2014 CONSUMER PERISHABLES DATABOOK

Hot topics | Demographic differences | Product usage | Retail performance

PRODUCE

BAKERY

SEAFOOD

MEAT

DELI

Featuring data from **Nielsen Perishables Group**

GROCERY HEADQUARTERS

A supplement to Grocery Headquarters magazine

2014 CONSUMER PERISHABLES DATABOOK

Category Data

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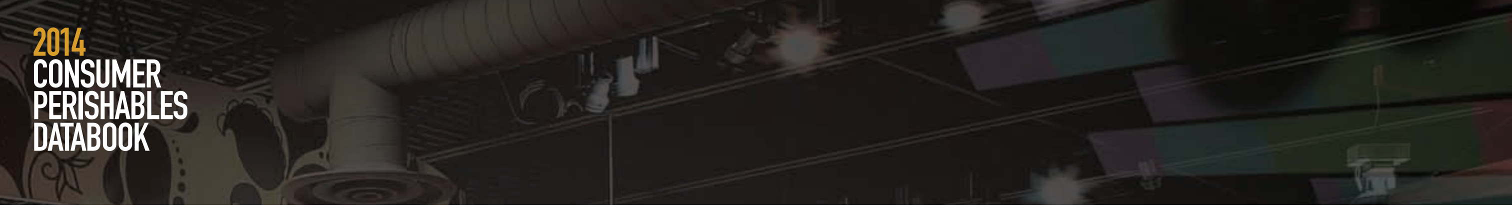

Fresh, by the numbers

The Consumer Perishables Databook is an in-depth analysis of top categories within the fresh departments.

BY SETH MENDELSON

HOW MANY TYPES OF APPLES ARE CURRENTLY AVAILABLE TO CONSUMERS?

I will play it safe and say more than 20, though I am pretty certain that the answer could actually be quite a bit higher. How about grapes? Cuts of meat? And how many products are in the bakery section?

The answers vary dramatically, but one thing is certain: If a retailer is serious about making a statement that his or her grocery store wants to be everything to almost every consumer, they have to be sure that the fresh section is totally up to speed.

The various fresh sections are in an enviable position at supermarkets across the country. Besides being the cash cow of the store, the fresh departments set the tone for the overall business. Place a lot of emphasis on the section, with a broad array of product, the right fixtures and, most importantly, the correct lighting, and you make a statement with consumers that you are taking the fresh departments very seriously. That statement will spread across the store like wildfire.

So how do retailers know what works? The objective of our annual *Consumer Perishables Databook* is to help retailers make the decision on what categories to stock and what items that they should carry within those categories. We study 60 different categories across a number of perishables segments with the able assistance of the Nielsen Perishables Group.

Our job, as always, is to give retailers as much information as possible about these categories to help them determine their overall marketing and merchandising strategies, not to mention what products to carry across these segments.

Of course it is not just about how many types of products are available in the marketplace, but which of those items are most in-demand with consumers and give retailers the best chance to build sales and profits.

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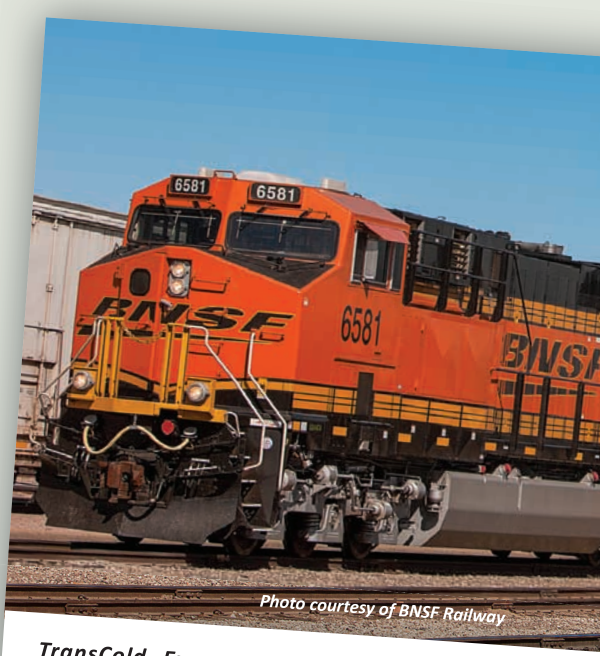

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COOKING TRENDS DRIVE FRESH GROWTH

Global influences and multicultural products contribute to increased sales.

{BY CARA AMMON}

CONSUMERS CONTINUE TO PLACE AN EMPHASIS ON PREPARING FRESH, HEALTHY FOODS FOR THEIR FAMILIES. This can take many different forms, from preparing traditional home-cooked meals, to assembling value-added meal components, to providing healthy, on-the-go snacks. The fresh departments are responding to consumers' needs with new items and packaging designed for today's busy lifestyles. Although many consumers want gourmet meals made from quality products, there are still those that have lingering concerns about the economy, maintaining cautious spending habits. According to the most recent Nielsen Global Survey of Consumer Confidence and Spending Intentions, consumer confidence fell four points in the last quarter of 2013, and 71% of consumers believe the U.S. is still in a recession. These attitudes likely contribute to consumers' desires to create healthy meals with premium ingredients at home.

Economic concerns may also be influencing where shoppers spend their food dollars. Traditional grocers still earn the majority of fresh dollars, but consumers are spreading their fresh purchases across a wider variety of retailers. Nielsen projects that by 2016 consumers will spend 15% of their fresh dollars at mass/supercenters and 12% of their fresh dollars at club stores.

No matter which type of retail outlet, fresh is more important to the retail environment than ever before. The five fresh departments: deli, produce, meat, bakery and seafood, are increasing contributions to store sales, now generating

30% of total sales. Meat is the largest contributor to the fresh space with 39% of dollar sales, followed closely by produce with 32% of dollar sales. During the 52 weeks ended February 22, the fresh departments continued to grow despite higher average retail prices. Dollar and volume sales increased for all five departments nationally.

Further evidence of fresh foods' importance is basket size. According to data from Nielsen Homescan, baskets containing fresh foods are up to two times larger than baskets without fresh foods. In recent years, shoppers have been filling their baskets with products that satisfy four key needs. Products with health, convenience, premium indulgence and multicultural or globally inspired characteristics are driving growth and sparking innovation across fresh departments.

On a department level, bakery experienced significant growth across all areas, including desserts, breads and rolls and breakfast items. Overall, for the tracked period, bakery dollar sales and volume sales increased by 4.8% and 3.9%, respectively, compared to the previous year, driven by consumers' needs for convenience, gourmet indulgence and expanding flavor palates.

Many consumers look to the bakery for convenience in the form of take-and-bake breads and rolls and other assemble-at-home items. Consumers who want "homemade" without the work have helped the take-and-bake segment grow by double-digits across the department.

Consumers also want premium indulgence, and where better to fulfill that desire than the bakery? Items with names that suggest decadence by listing or implying three or more flavors, such as cranberry oatmeal walnut, triple chocolate or coconut macadamia white chocolate, had significant growth. In addition to sweets, indulgence can also be in the form of savory items. Baked goods such as herb-infused breads and bagels can also satisfy a craving for a tempting treat.

Shifting demographics, the Internet and restaurants have introduced consumers to a variety of new flavors, and this has impacted what consumers look for in the bakery. Within breads, for example, naan and pita both experienced significant growth, up 13.7% and 5.0%, respectively, compared to the previous year.

The deli department is also experiencing strong growth, primarily driven by consumer demand for quick and easy meals and snacks for their families. Deli-prepared foods now generate 57% of department dollars. Seemingly, in an effort to compete with restaurants and provide an alternative option for take-out, retailers have improved the quality of their prepared food offerings and increased the variety and number of items available. This strategy is working; during the tracked period deli-prepared foods increased dollar and volume sales by 7.3% and 6.1%, respectively, more than any other deli offering. Dollar and volume sales are up in every deli prepared foods category.

Similar to bakery, consumers are looking for help creating "homemade" meals; they want to be more involved in preparing meals at home but want part of the work done for them. For example, pizza components that allow consumers to assemble a pizza at home have increased in dollars and volume 7.5% and 5.7%, respectively, compared to the previous year.

Fresh food growth

	DOLLAR GROWTH	VOLUME GROWTH
Bakery	4.8%	3.9%
Deli	5.4%	4.3%
Meat	3.5%	1.3%
Produce	7.3%	3.2%
Seafood	5.7%	0.9%

How much are consumers buying?

	AVG. ITEM COUNT (PER STORE/WEEK)	% CHANGE
Bakery	311	3.1%
Deli	494	3.3%
Meat	762	1.4%
Produce	683	5.8%
Seafood	109	1.9%

The cost of fresh

	AVG. RETAIL PRICE	% CHANGE
Bakery	$2.86	0.8%
Deli	$4.86	1.1%
Meat	$3.19	2.2%
Produce	$1.45	4.0%
Seafood	$6.31	4.8%

Promotional dollars

	DOLLARS % ON PROMOTION	DOLLARS % ON PROMOTION YR AGO
Bakery	14.2%	14.2%
Deli	15.1%	15.6%
Meat	23.7%	24.7%
Produce	20.0%	20.5%
Seafood	23.3%	24.9%

Source: Nielsen Perishables Group Fresh Facts, total U.S. 52 weeks ended February 22

With consumers' busier lifestyles, many are skipping traditional meals in favor of on-the-go snacking. While they may not want a full meal, many are looking for healthy options and exotic flavors. Increasingly, the deli is providing options to meet these needs, and consumers are responding. Deli snacking items with a declared health benefit, such as low saturated fat or unsalted, experienced double-digit increases.

The meat department also experienced dollar and volume growth in all areas, despite slight across-the-board increases in average retail price. Total department dollars were up 3.5% and volume was up 1.3%. This growth can be attributed to some of the same trends occurring across fresh.

Consumers want to feel more involved in meal preparation, but in today's busy world they are looking for quicker and easier options. As seen in other fresh departments, consumers want help in creating a "homemade" meal. Despite higher prices, the desire for easier meal solutions has led to increased sales in convenience items across beef, pork and chicken, including value-added meats, such as seasoned or marinated meats, and fully cooked meats.

Global influences are also evident within the meat department; consumers are trying new types and cuts of meat in a wide variety of multicultural flavors, including buffalo and goat or prepared meats with international seasonings such as sesame ginger or masala.

Traditional proteins and cuts of meat still generate the majority of sales; however higher retail prices are spurring new uses and more trading among the different proteins. For example, versatile cuts such as ground beef and chicken breasts can be used in any number of ways, and consumers can easily use these cuts as substitutes.

The produce department has also gained from greater demand for health benefits as consumers move toward including more fresh fruits and vegetables into their diets. Even with a 4.0% increase in average retail price, dollars increased 7.3%, and volume increased 3.2% for the tracked period.

Another contributing growth factor is the increasing popularity of value-added produce for meals and snacking. Both the value-added fruit and the value-added vegetable categories posted double-digit increases in dollars and volume during the latest 52 weeks. Though consumers are busier than ever—and snacking is becoming more important—they still want healthy options. Produce sales have benefited from this trend as produce companies are providing consumers with portion-controlled, healthy snacking options, such as single-serve, pre-cut vegetables with dip.

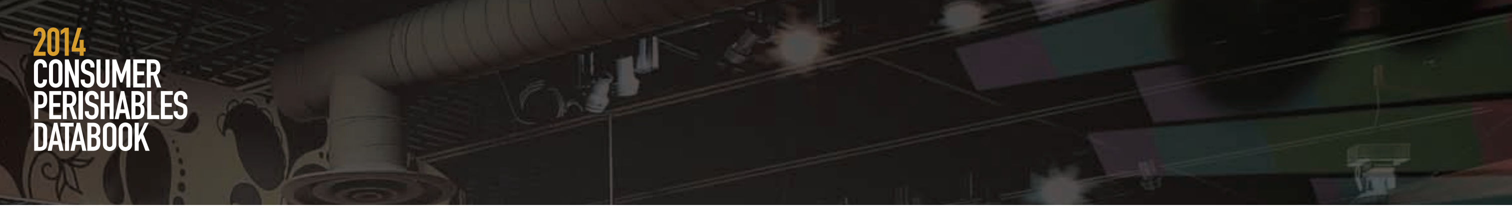
Value-added produce also allows for more convenient meal preparation. Value added vegetables for meal preparation and side dishes have experienced significant increases, with meal preparation dollars and volume up 8.7% and 8.0%, respectively, and side dish dollars and volume up 17.0 and 15.6%, respectively. Moving beyond just pre-cut vegetables, many of these items may be seasoned or packaged in microwavable bags. Like the meat department, consumers are seeking value-added components to help them create "homemade" meals.

The increasing demand for global flavors is present within the produce department as well. Consumers are discovering "new" fruits such as mango, papaya and pomegranate, and driving growth in the specialty fruit category. Additionally, while still small in terms of sales, there has been significant growth in exotic fruits and vegetables such as star fruit, sapote and sun chokes.

The seafood department's dollar growth can be attributed in part to higher retail prices. For the 52 weeks ended February 22, volume remained steady and dollars increased 5.7%. The seafood department is the smallest of the fresh departments in terms of dollar sales; however, seafood shoppers are important to retailers. On average, seafood shoppers spend more than $75 per trip.

Similar to trends for fresh meat, seafood shoppers are looking for convenient meal solutions. During the past year, value-added seafood dollar sales increased 4.4% as consumers look for easier ways to prepare meals at home. Items such as stuffed or marinated salmon and seasoned shrimp contributed to growth in the value-added segment.

The seafood department also caters to shoppers seeking indulgence. Many consumers are turning to the seafood department for premium items for dinners at home; dollar and volume sales for products including lobster, crab and other higher-priced seafood items increased, along with the number of households purchasing these premium items.



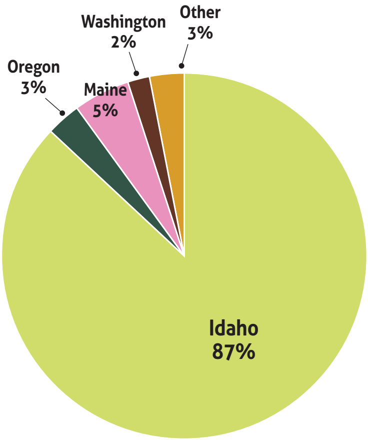
Information & Methodology

About the Nielsen Perishables Group

The Nielsen Perishables Group is the industry expert in fresh food consulting. As a vital part of Nielsen, a leading global provider of information and analytics around what consumers watch and buy, we provide a holistic picture of store-level activity across retail channels. Based in Chicago, the Nielsen Perishables Group offers a full spectrum of products and services geared toward complete market and category understanding. Solutions include retail measurement, consumer research, analytics, marketing communications, category development, best practice development and shopper insights. We have 14 years of experience refining tools and strategies for maximizing success in the fresh departments. *Find out more at www.perishablesgroup.com.*

WHAT STATE PRODUCES THE BEST POTATOES?

Source: Grocery Headquarters survey of 800 consumers taken April 27 to May 11.



About the data in this Consumer Perishables Databook

NIELSEN PERISHABLES GROUP FRESHFACTS®

The Nielsen Perishables Group provides point-of-sale scan data from the U.S. Fresh Coverage Area (FCA). The FCA universe includes key retailers from food, mass/supercenter and club chains, or more than 18,000 stores. The data set does not include alternative channels such as convenience or natural foods stores. The data is an aggregate of both UPC and random-weight (PLU and system 2) items. Data is aggregated from a store, item, weekly feed.

Contact the Nielsen Perishables Group for more information:

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FRESHFACTS® SHOPPER INSIGHTS POWERED BY SPIRE, A DATALOGIX COMPANY

Through a partnership with Spire, the Nielsen Perishables Group develops insights around shopper dynamics and switching behaviors by accessing shopper loyalty card data. The loyalty card data includes every product purchased in the store, including all fresh department items, both UPC and random-weight. Data is from approximately five million static U.S. households covering a cross-section of regional food retailers. The Spire panel closely matches U.S. census demographic profile.

The Bakery Department

By targeting key households, innovating to meet consumers' needs and implementing an effective promotional strategy retailers can continue to win sales.

{BY LYNN BROTZMAN, NIELSEN PERISHABLES GROUP}

Although often viewed as an occasion-based department, the bakery is a diverse and growing space. Bakery offerings are evolving to meet a range of shopper needs—from convenient breakfast solutions and meal components for lunch and dinner, to decadent desserts for personal treats and special occasions.

In 2012, rising everyday prices and decreased shopper trips slowed bakery department growth, however conditions rebounded in 2013. Dollar and volume sales increased 5% and 4% for the 52 week period ended February 22, and sales were up across the majority of bakery categories as pricing stabilized.

Shifting sales among complementary products was a notable bakery trend. For example, the rolls category outpaced bread dollar growth and gained volume share as a result of new and varied offerings. On average, retailers expanded offerings by 8% to include products primarily found in restaurants such as chocolate-filled croissants, cheese rolls and pretzel buns. A similar story is shaping up with cakes and cookies, which together account for 40% of department sales. Although a heavily shopped category, cake dollar and volume sales have slowed over the past year, but cookies are picking up the slack. Cookies—like chocolate chip and snickerdoodle—offer shoppers a convenient, portion-controlled alternative to cakes.

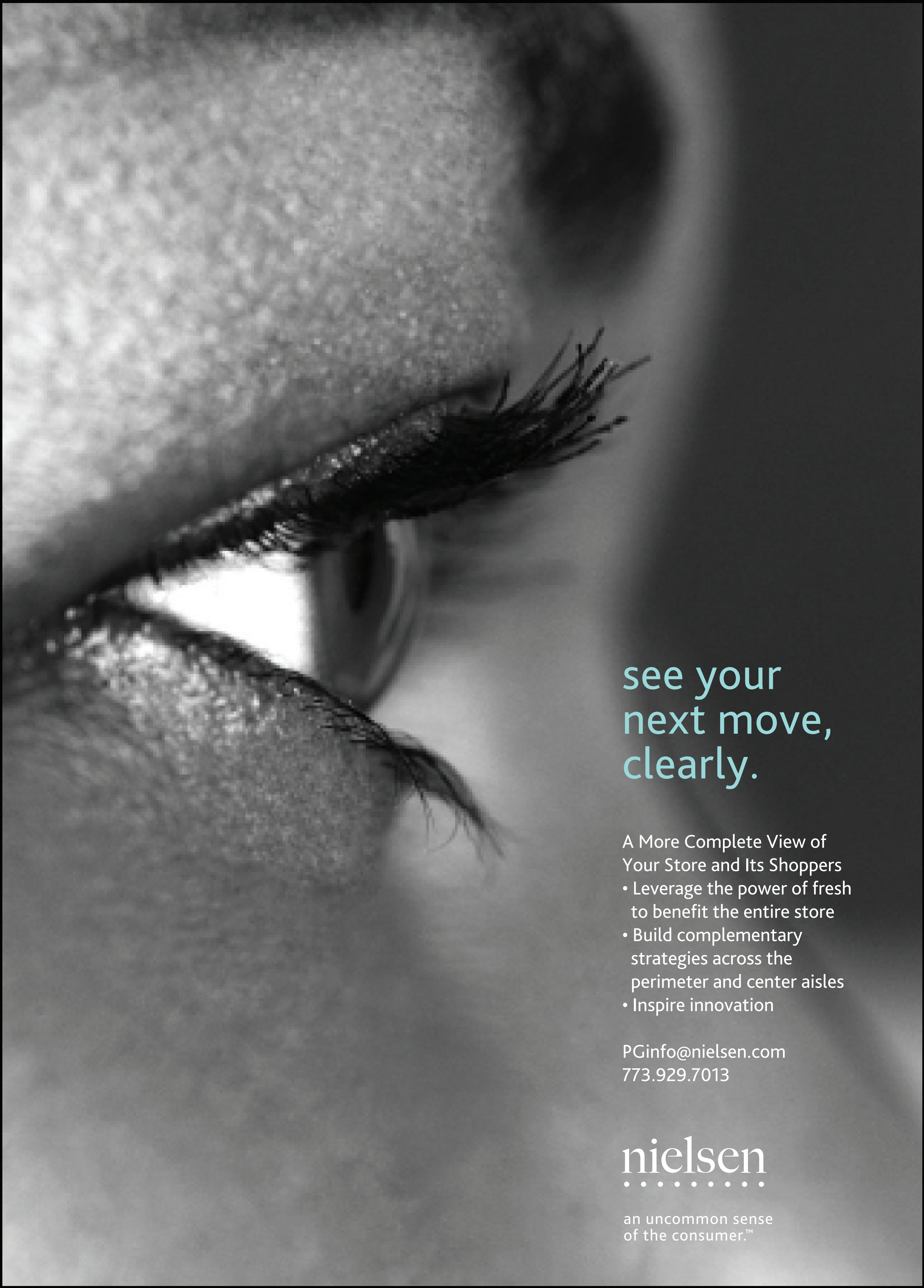
Nearly 45% of in-store bakery shoppers are seeking products that fulfill three primary needs: premium, convenience and health. These shoppers tend to be couples and families looking for quick meal solutions. It is important to understand and innovate around these needs and consider the type of consumer demanding them. To target these shoppers effectively, bakery products should be suitable for small households and families and meet at least one of the key needs.

Naturally, the bakery is known for premium, indulgence offerings. Shoppers seek out fudge, dipped treats and tres leches or tiramisu cake for their gourmet qualities. However, gourmet indulgence in the bakery is not limited to sweet flavors. Savory specialty rolls experienced double-digit growth with the introduction of new products such as cheese rolls and ciabatta/panini rolls.

Convenience at the in-store bakery takes many forms. Many U.S. households consist of one or two members and accommodating this demographic in the bakery translates to smaller package sizes, especially with desserts. With a 7% increase in dollar sales, another convenience craze in the bread segment is take-and-bake, which allows consumers to serve hot, fresh bread at their convenience.

Health is also priority for many consumers, even in a department commonly associated with indulgence. For example, consumers use mini desserts to manage portions; with additional mini dessert offerings in the bakery dollar and volume sales increased 7% and 5%, respectively. Gluten-free products also increased bakery presence, up 50% in dollar sales. Breads have the highest number of gluten-free products followed by dessert items like cakes and cookies.

Perishables Group FreshFacts Shopper Insights — Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.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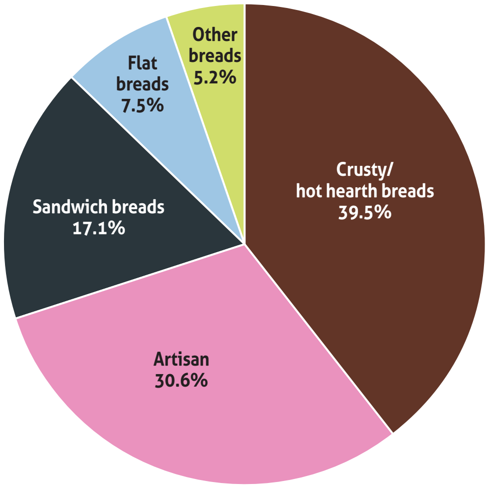
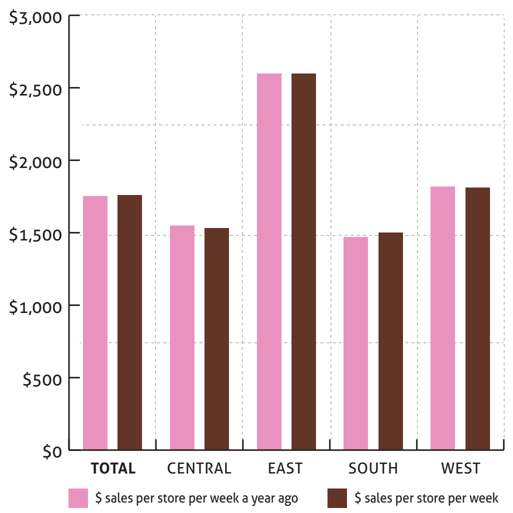
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14

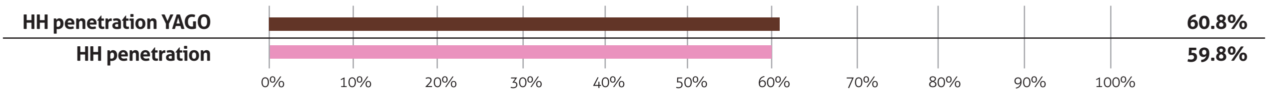


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

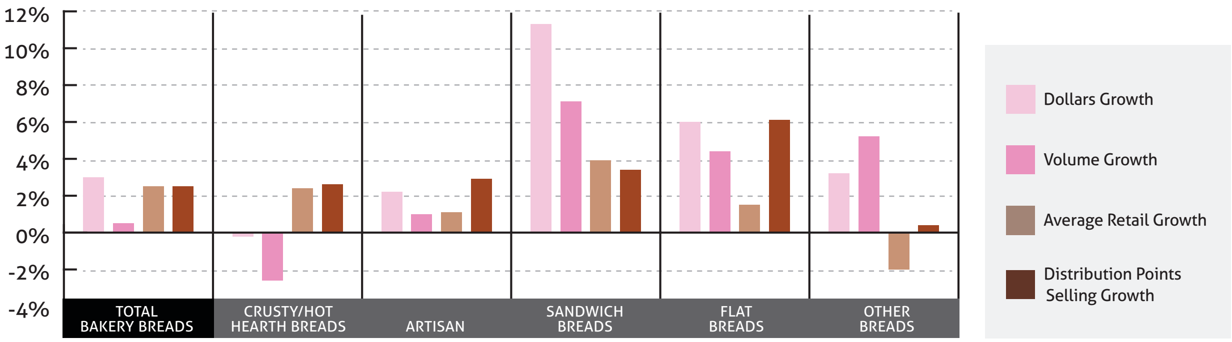


Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.

Share of Category Dollars

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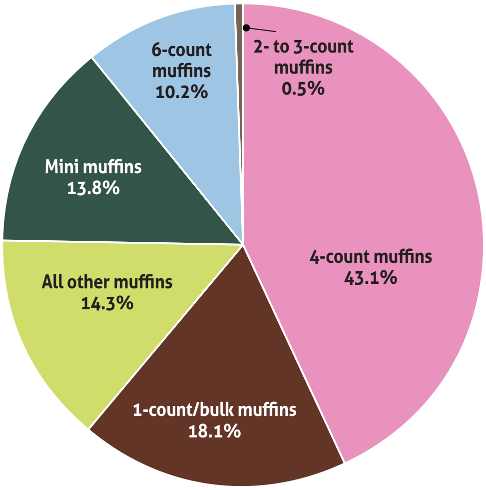

Average Weekly Dollar Sales by Region

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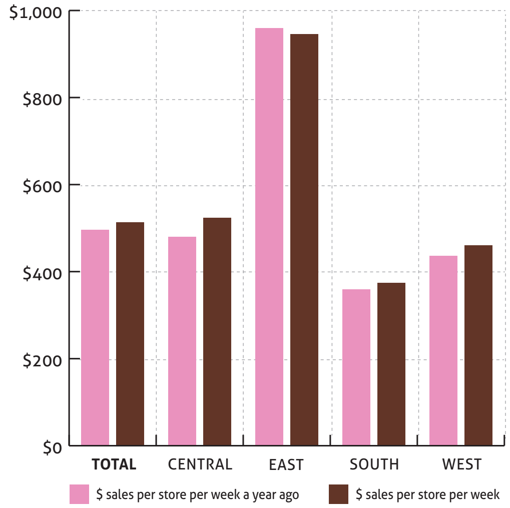
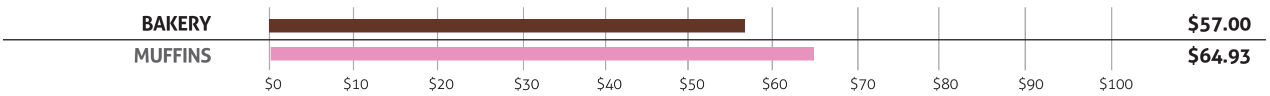


Average Basket Size Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

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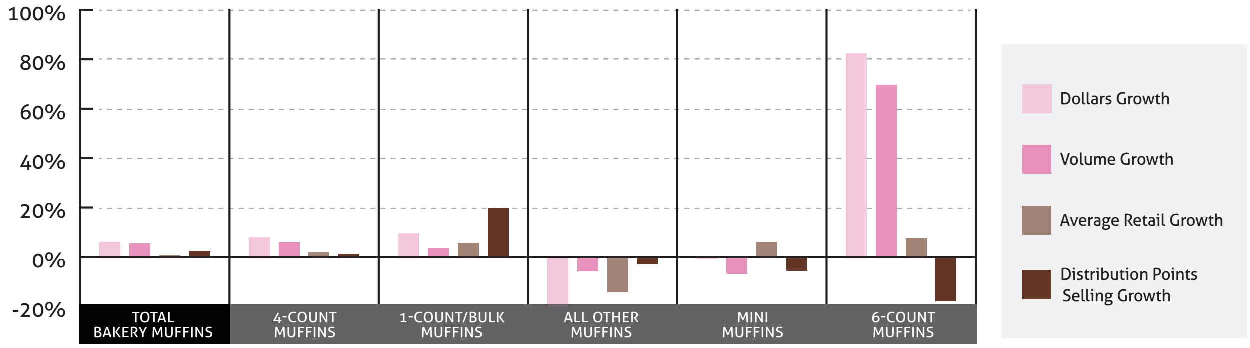

Perishables Group Keeping Your Business Fresh | FreshFacts Shopper Insights

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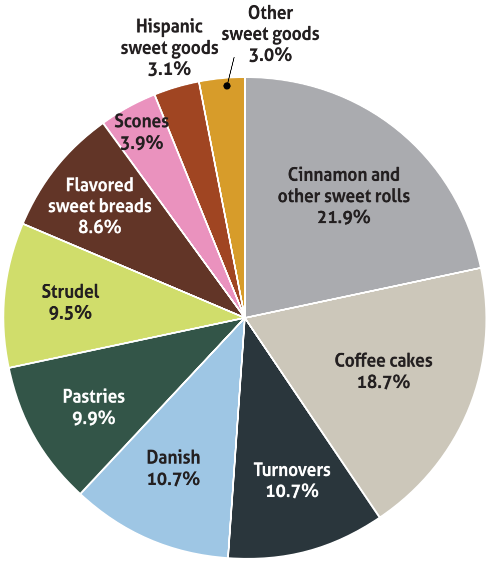
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14



Average Weekly Dollar Sales by Region

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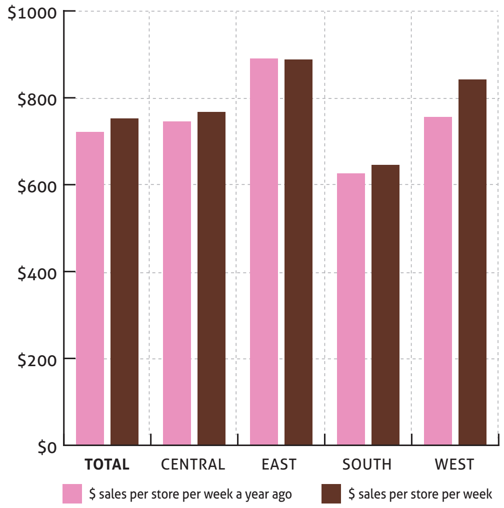
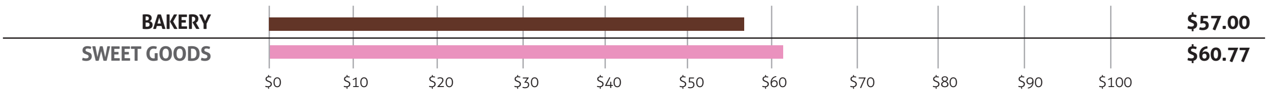


Average Basket Size Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

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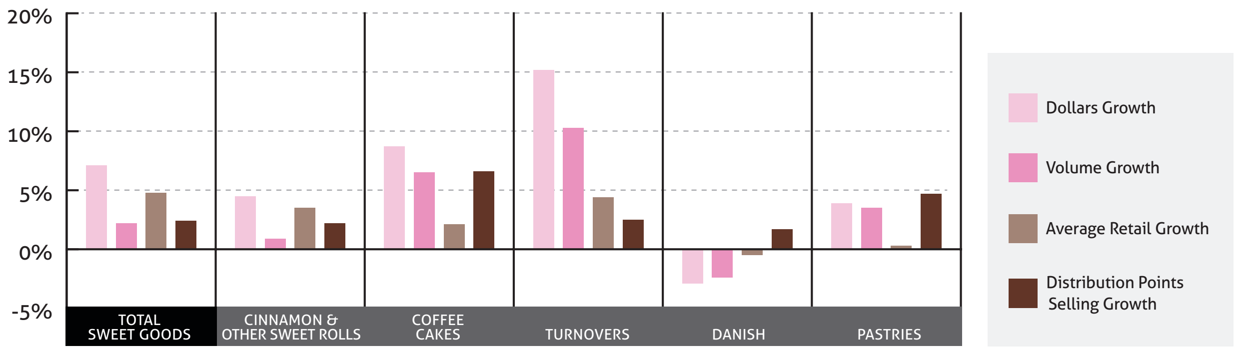

Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.

The Meat Department

The meat department can continue to drive success by innovating with alternative cuts, meal solutions and consumer education.

{BY KATE GRITTI, NIELSEN PERISHABLES GROUP}

As the largest of the five fresh departments, the meat department is an important component of both fresh and total store success. During the latest 52 weeks ended February 22, the meat department increased dollar sales 4% and volume 1%. However, this growth was slower in comparison to the other fresh departments, and can be partially attributed to continued consumer concern over rising meat prices.

During the tracked period, shoppers spent $14.47 per trip in the meat department, the most of any fresh department. The average shopper basket containing meat was $62.83.

Fresh meat is the main driver of department sales, comprising 62.2% of dollars. Fresh beef represents more than half of fresh meat dollars. Despite high sales, beef grew at a slower-than-average rate. As consumers become wary of rising beef prices, many have begun to stray from traditional cuts to more affordable and flavorful alternatives. This trend is evident when looking at category growth. During the latest 52 weeks, shank, brisket, plate and flank had the strongest dollar growth, up 6.9% and 7%, respectively. Traditional cuts like sirloin and round maintained steady sales compared to the prior year despite increased pricing.

The largest driver of fresh meat dollar growth during this period was chicken, which increased 6.8% compared to the prior year. Although chicken breasts made up the majority of fresh chicken sales, consumers have increasingly become attracted to lower-priced options. Chicken thighs and chicken combo-packs were among the fastest growing varieties, with thighs ($1.80 per pound) growing dollars 12.2% and combo packs ($1.45 per pound) gaining 21.5%. In comparison, chicken breasts sold for $2.82 per pound.

While most fresh meat categories maintained steady volume sales due to price increases, lamb and pork decreased prices, helping to grow volume. Lamb posted the strongest volume growth among fresh meat, up 4.6%. With a low price per pound compared to other cuts, shoulder butt drove volume growth for the pork category, far outpacing growth of the largest sub-category, loin.

Representing 27.1% of department dollars, processed meat is an important component of meat department sales. Processed meat increased dollars 2.6%, led by bacon, the largest sub-category. Bacon grew 13.1% in dollars compared to the previous year; however, growth was driven by steep price increases of 12.3%.

Fully cooked meat, a smaller contributor to the meat department, posted strong growth, increasing dollars by 5%, with all varieties growing except fully cooked turkey. Fully cooked chicken represented the majority of sales, but fully cooked beef and stir fry/fajita strips had the strongest growth, increasing 8% and 11.9%, respectively.

While still a small part of total meat sales, natural and organic products have seen strong growth in the meat department. Despite the lack of clarity over natural labeling, natural meat has grown 9.8% in dollars. Organic also continues to grow, up 26.7% in dollar sales. Other health claims seeing growth in the meat department are grass-fed, antibiotic free and vegetarian fed.

Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.

Share of Category Dollars

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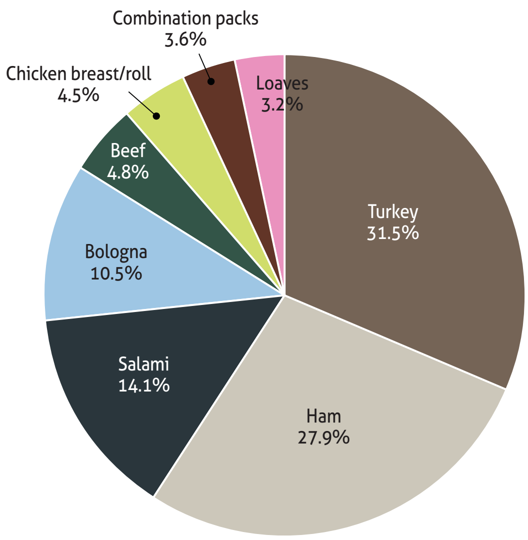
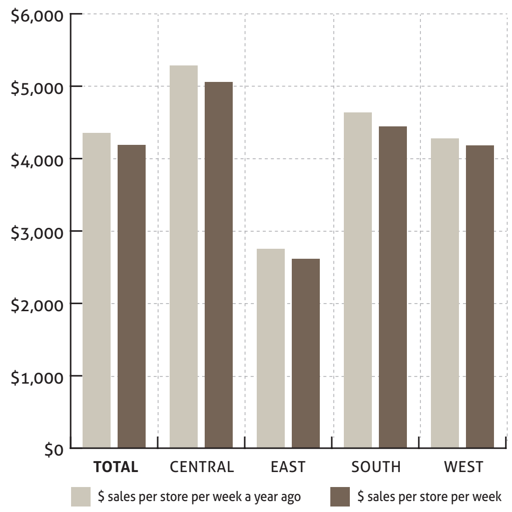
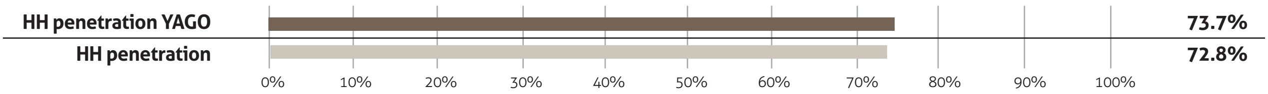


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

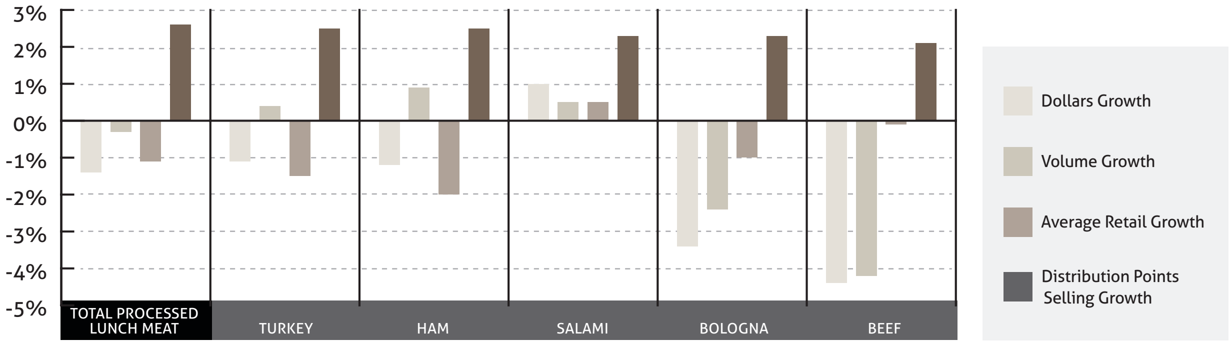


Household Penetration Total U.S. for the 52 weeks ended 2/22/14



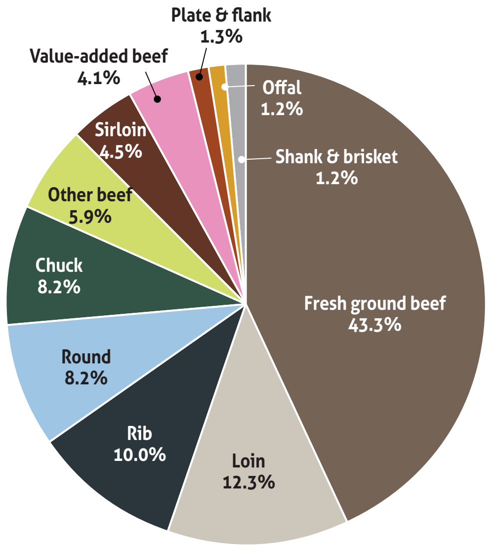
Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14

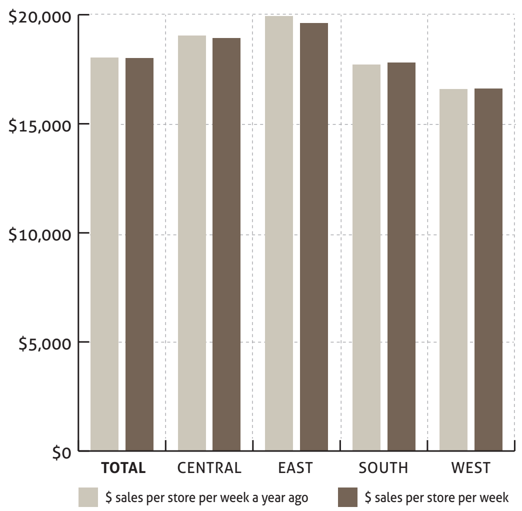


Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.

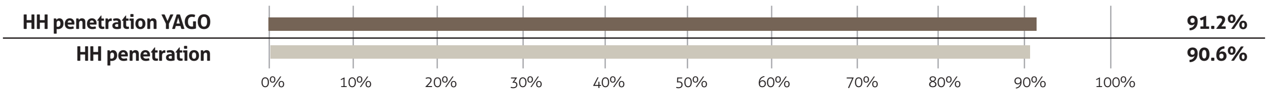
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14



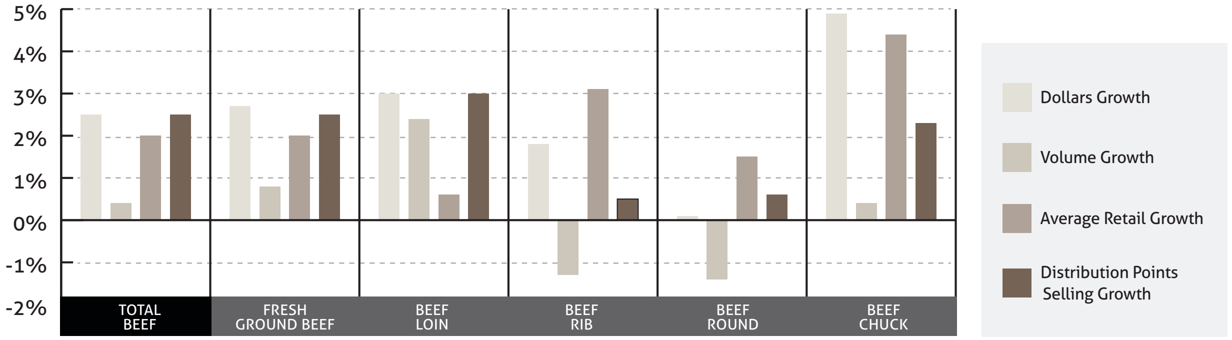
Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14



Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14



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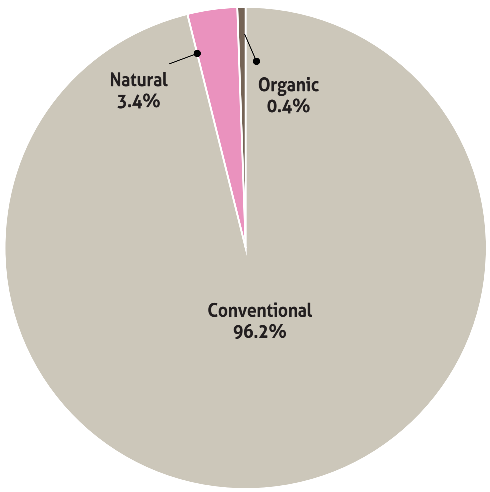
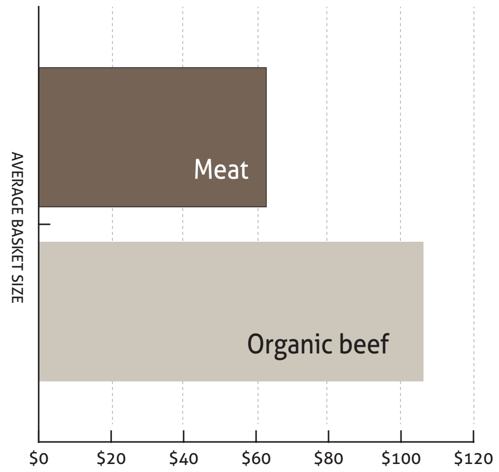
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14

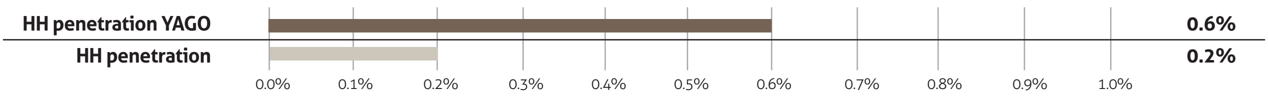


Average Basket Size

Total U.S. for the 52 weeks ended 2/22/14



Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

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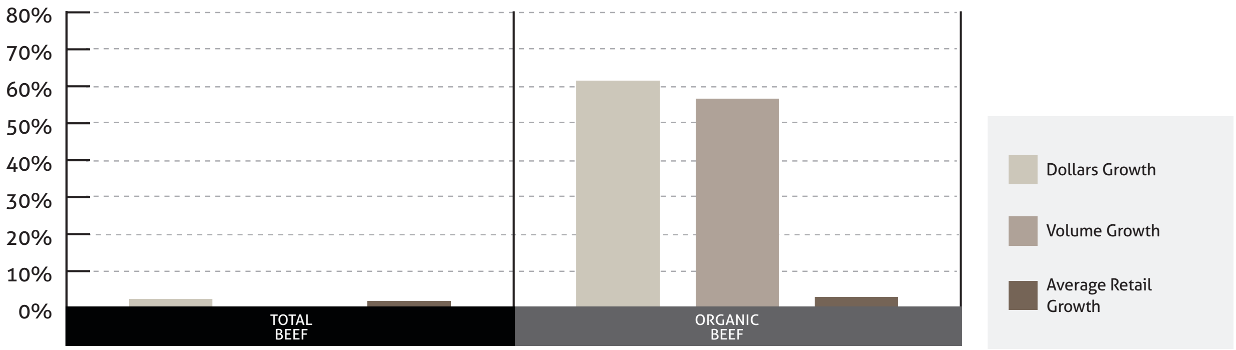

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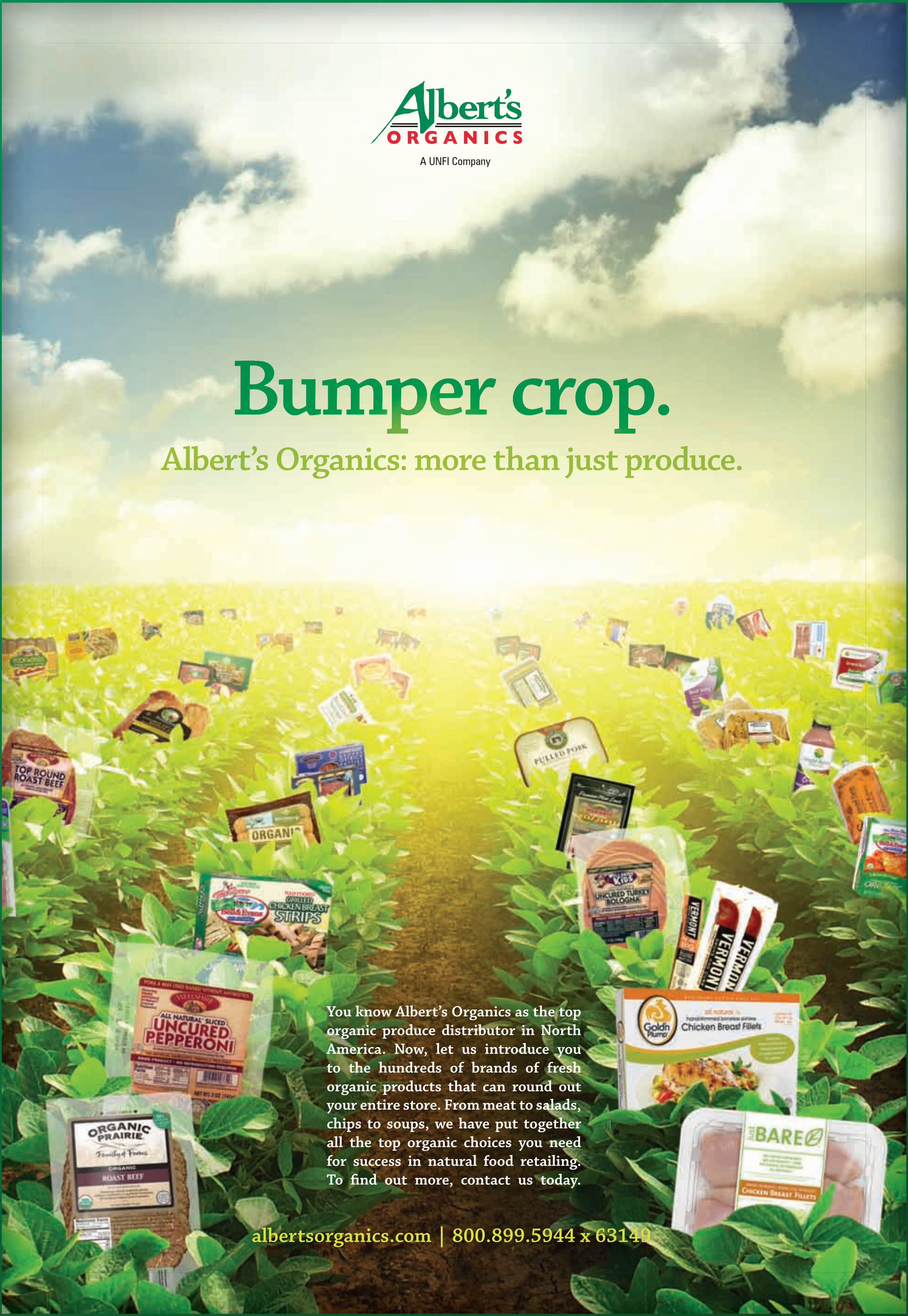
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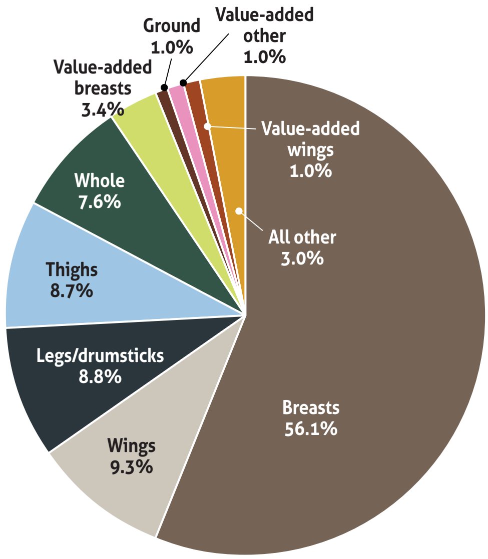
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14



Average Weekly Dollar Sales by Region

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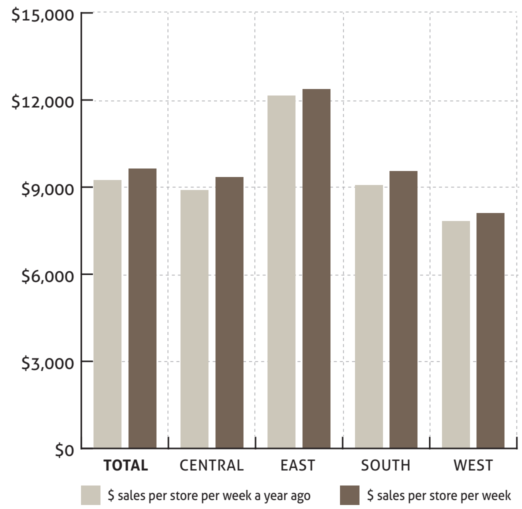
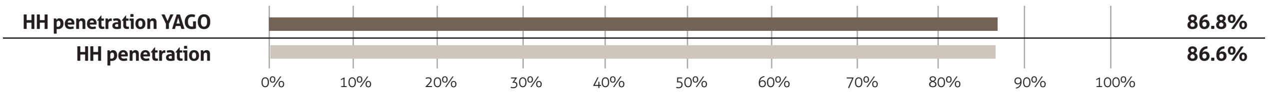


Household Penetration Total U.S. for the 52 weeks ended 2/22/14



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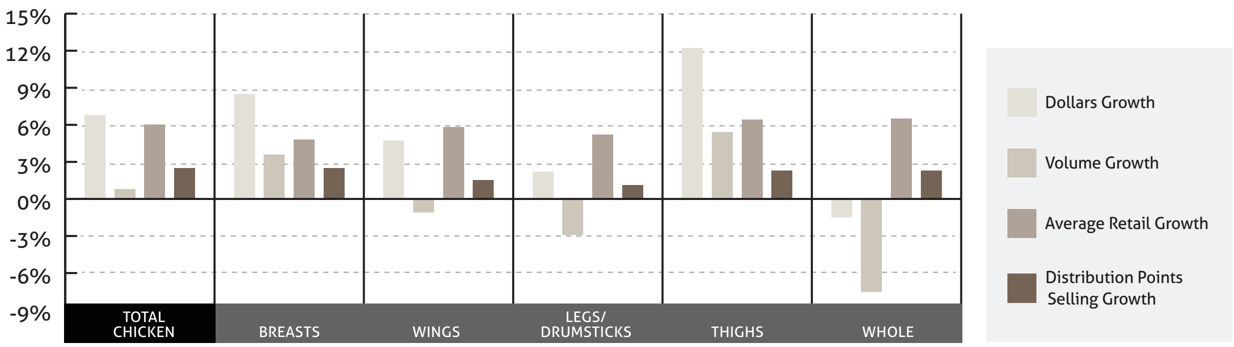

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Share of Category Dollars

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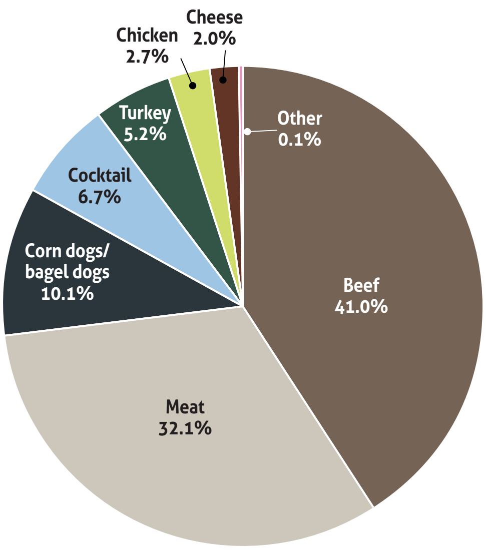

Average Weekly Dollar Sales by Region

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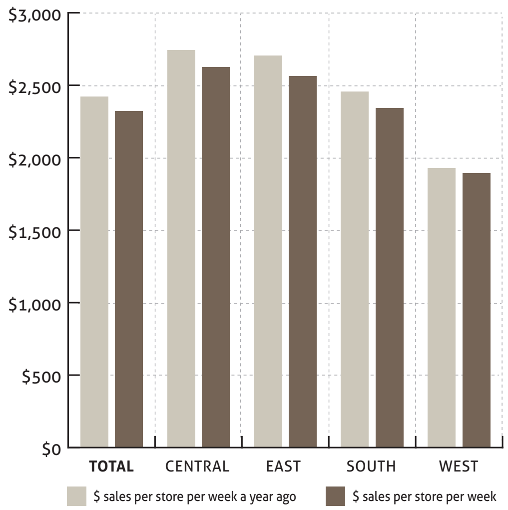

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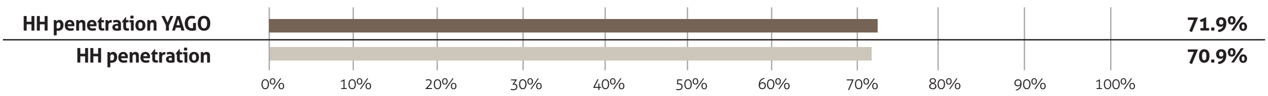

Trend Comparisons

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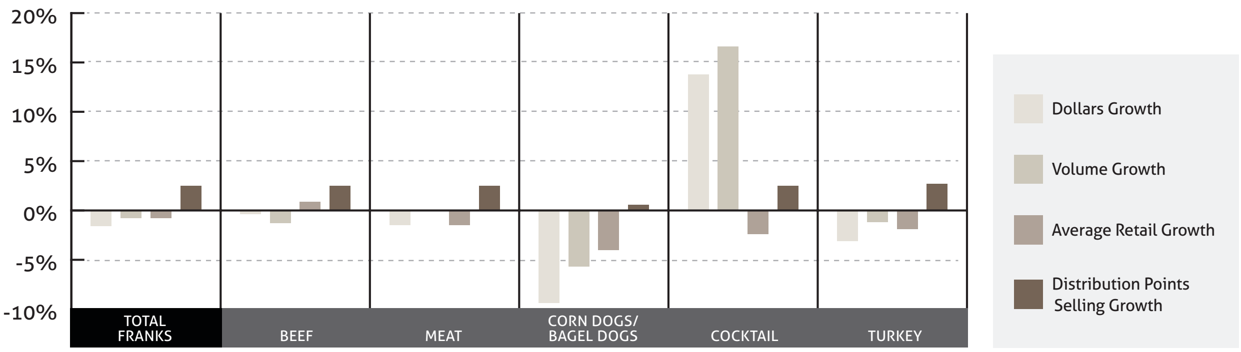

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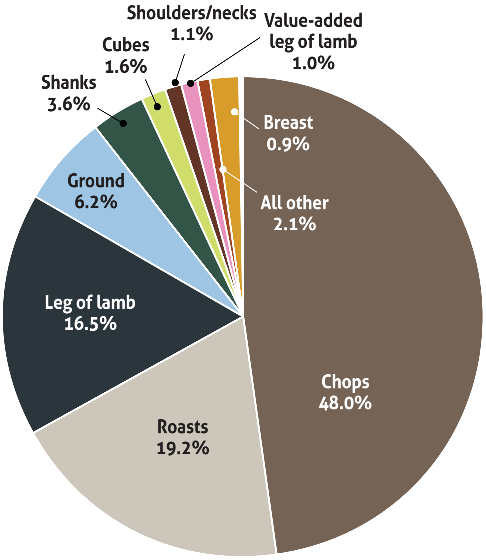
- **SUPERIOR SALES VELOCITY,** selling 8% faster per item than the category average[2]

Source: IRI Infoscan - Total U.S. MultiOutlet - Data Ending 4/13/13
[1]Sales Trend using Dollar Sales during 52 Weeks Ending 4/13/14 vs. 52 Weeks ending 4/17/11
[2]Sales velocity calculated as Dollars Sold per Average Weekly Total Point of Distribution over 52 weeks ending 4/13/14, comparing Nathan's Famous brand vs. total hot dog category average

Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14



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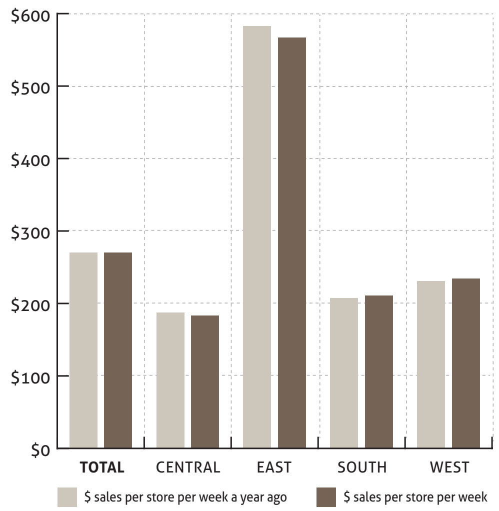
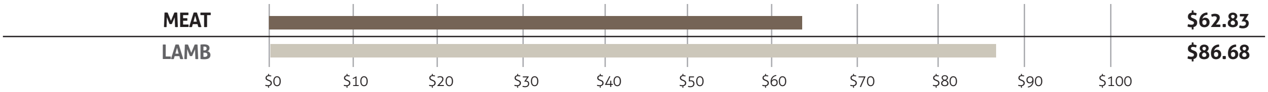
Total U.S. for the 52 weeks ended 2/22/14



Average Basket Size Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

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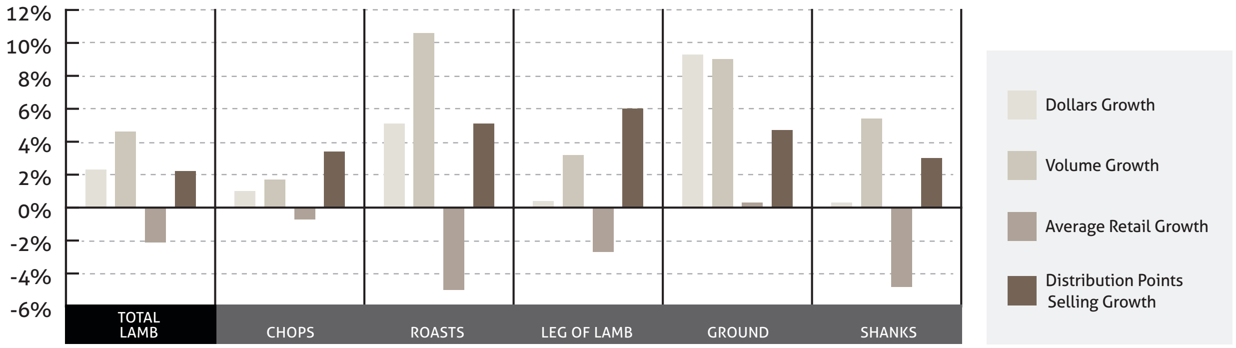

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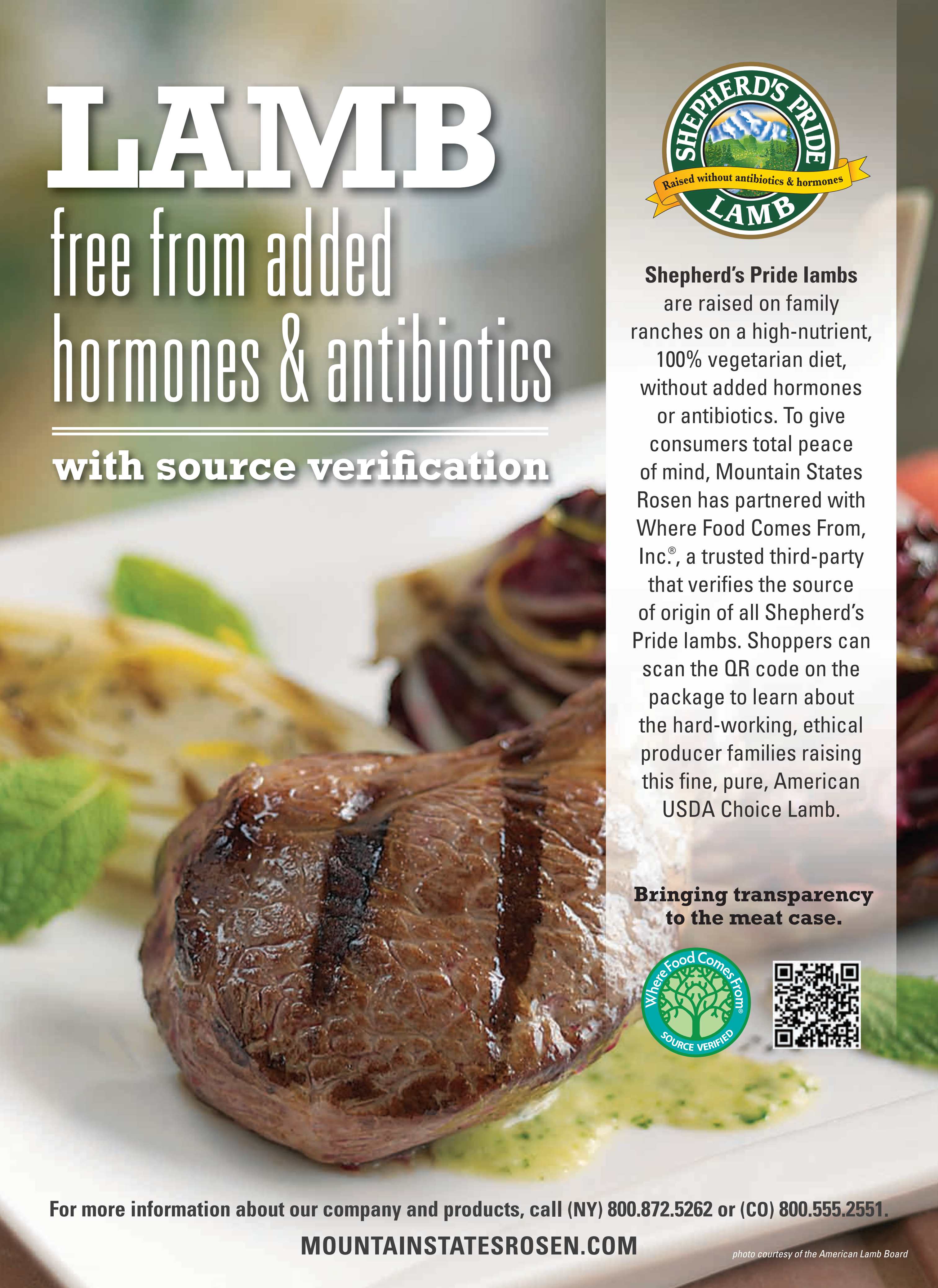
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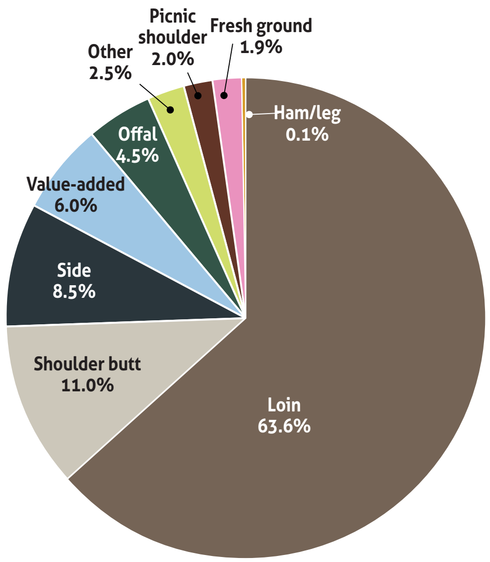
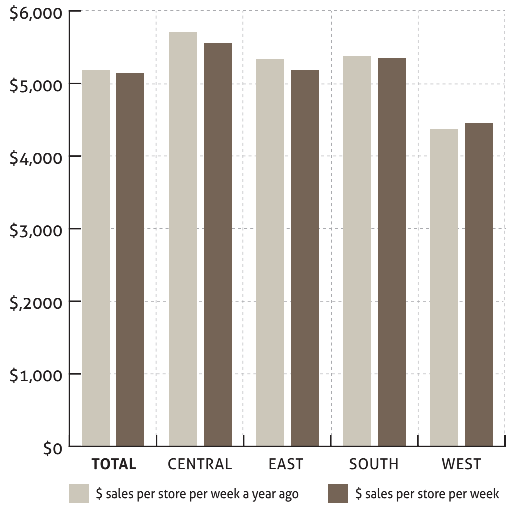
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14

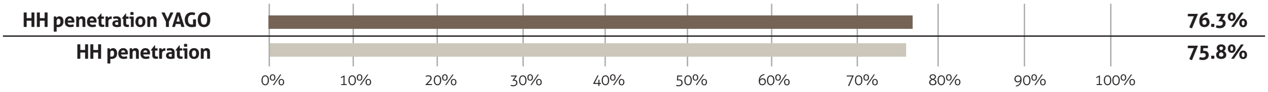


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14



Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

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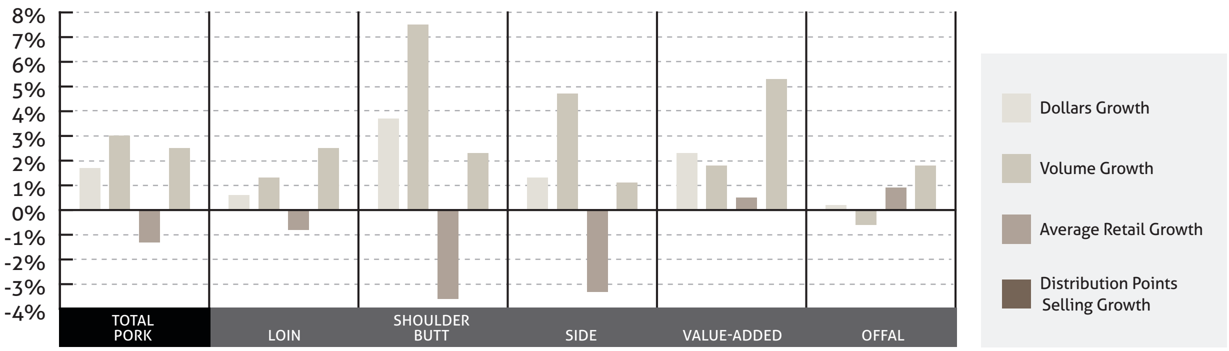

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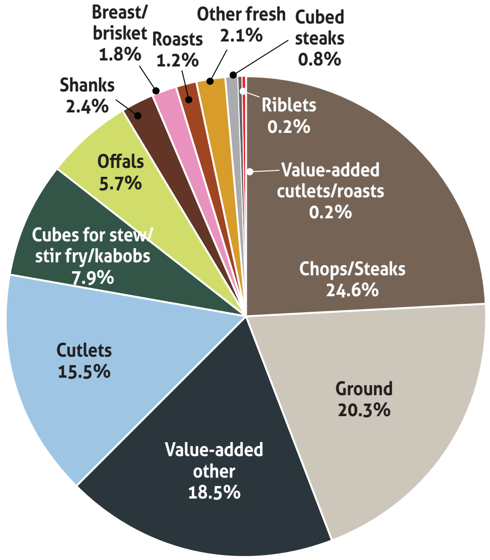
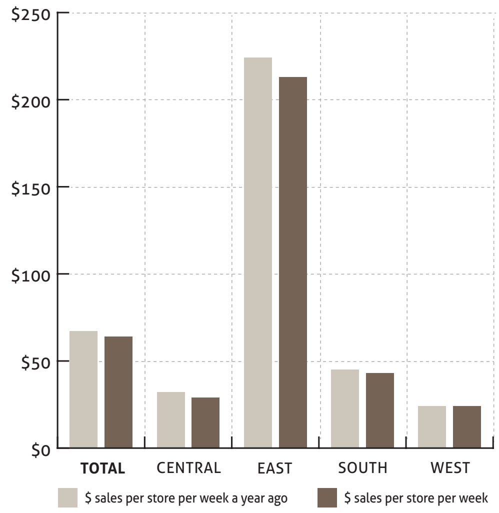
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14

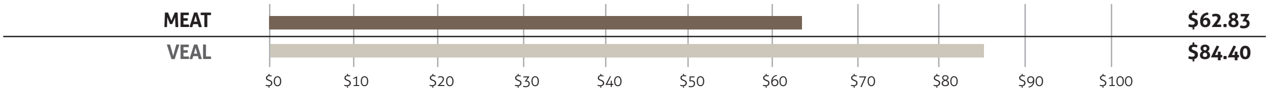


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14



Average Basket Size Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

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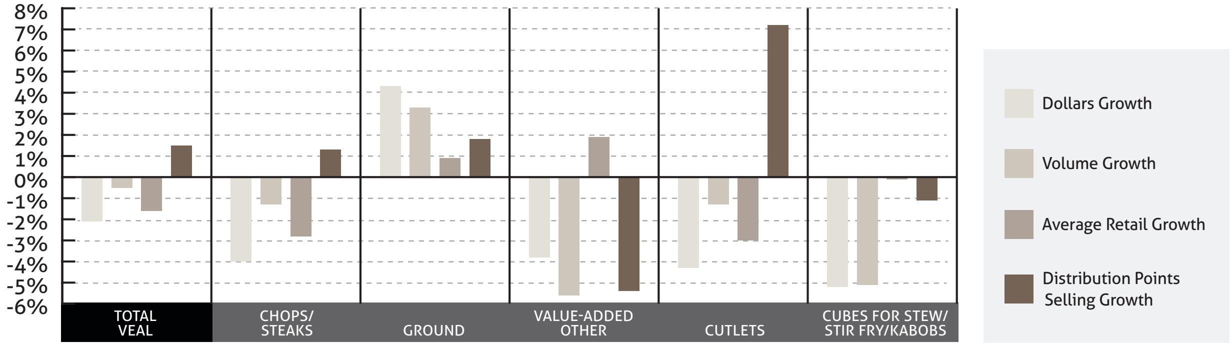

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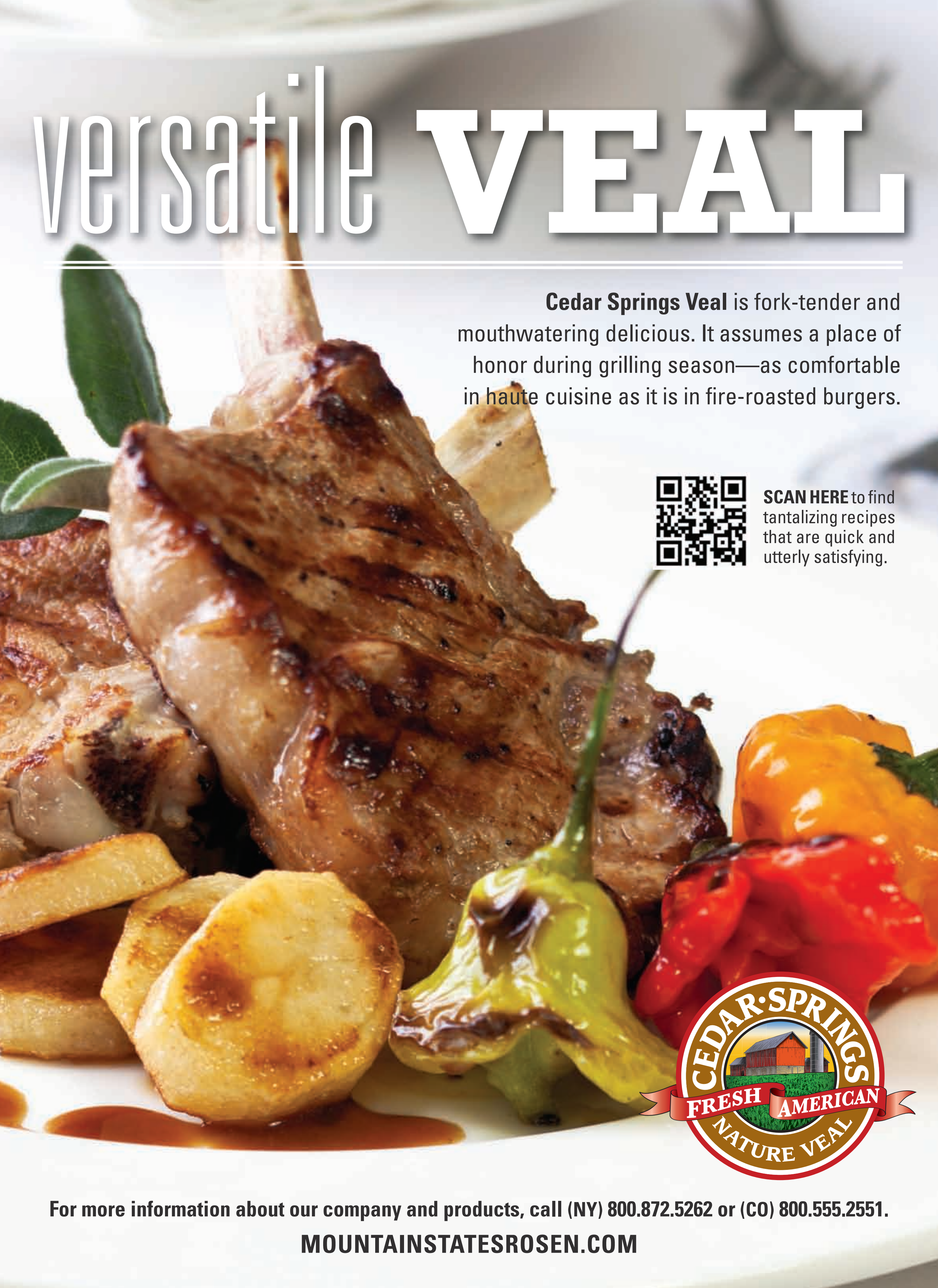
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The Deli Department

Retailers have the opportunity to leverage the in-store deli as a point of differentiation, and attract shoppers from other retailers and from the foodservice industry.

{BY JADE BLACK, NIELSEN PERISHABLES GROUP}

THE DELI DEPARTMENT is becoming increasingly valuable to shoppers, both in prepared and non-prepared categories. This evolution of the in-store deli continued to drive department growth. Many retailers are overhauling their formats to more closely resemble foodservice and are improving product quality, often placing grocers in direct competition with foodservice. While foodservice-type offerings continue to drive deli sales upward, established categories are also contributing to department growth.

During the 52 weeks ended February 22, deli department dollar and volume sales increased 5% and 4%, respectively. This was the highest volume growth among the five fresh departments nationally. Dollar growth in the deli was third behind seafood and produce, and everyday pricing in the deli experienced minimal increases. The department also continued to expand offerings, increasing unique items selling on store shelves 3% compared to the previous year.

The deli department maintains a wide reach across the U.S. with 94% of households purchasing deli products throughout the year. Deli shoppers spend an average of $8.58 per trip on deli products and make 15 trips to the deli per year. These shoppers are valuable across the store—shoppers spend $61.29 when a deli product is in the basket. This basket ring is second only to the seafood basket.

Deli meat and deli cheese are two established categories that experienced dollar gains during the latest 52 weeks, up 3% each. Consumers are using deli meat and cheese to supplement gourmet foodservice in the comfort of their homes, demonstrated by growth in deli specialty meat and deli specialty cheese. Deli specialty meat increased dollar and volume sales 10% and 9%, respectively.

The major source of department innovation and convenience trends is deli prepared, where sales of products like deli prepared chicken, deli entrées and deli sides continue to climb. In fact, each of the 15 deli prepared categories increased dollars and volume during the latest 52 weeks. Overall, deli prepared foods increased dollar and volume sales 7.3% and 6.1%, respectively.

Deli prepared chicken, despite being an established category, continues to experience dollar growth, up 9% versus the previous year. Retailers are expanding offerings beyond the basic rotisserie chicken to include flavor options like Italian and barbeque-flavored chicken. It is not just main-dish products posting growth in deli-prepared. Deli sides increased dollar sales 12% compared to the previous year, as consumers seek quick options to complete their meals. Retailers have responded to this demand—the number of unique deli side items selling on store shelves also increased compared to the previous year.

Retailers are also catering to multiple eating occasions throughout the day. Deli breakfast food dollar sales grew 8% as shoppers look to the deli for quick, quality morning meals. Breakfast sandwiches, French toast, pancakes, waffles and omelets are among the fastest growing breakfast foods.

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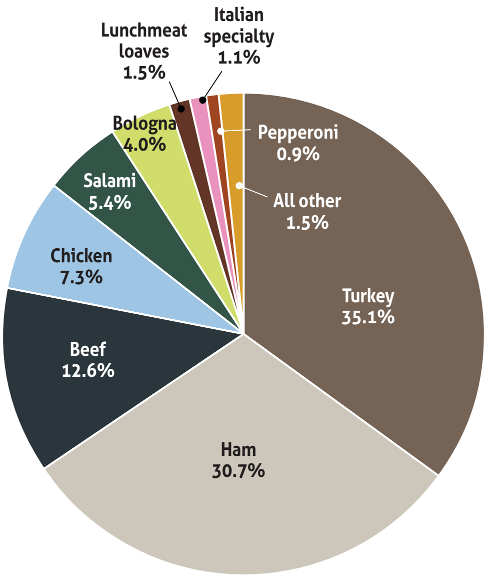
Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.

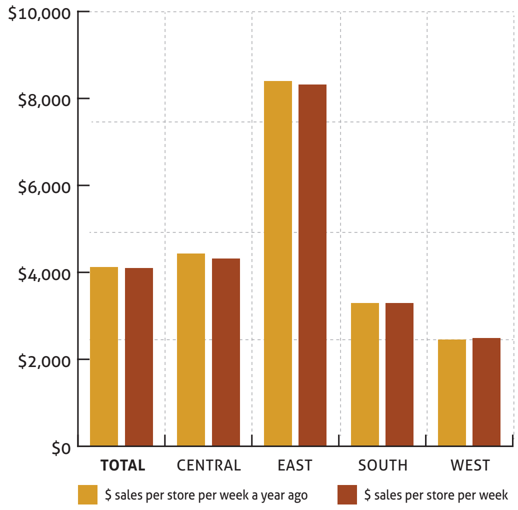
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14

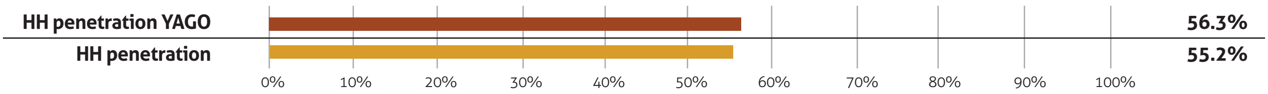


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

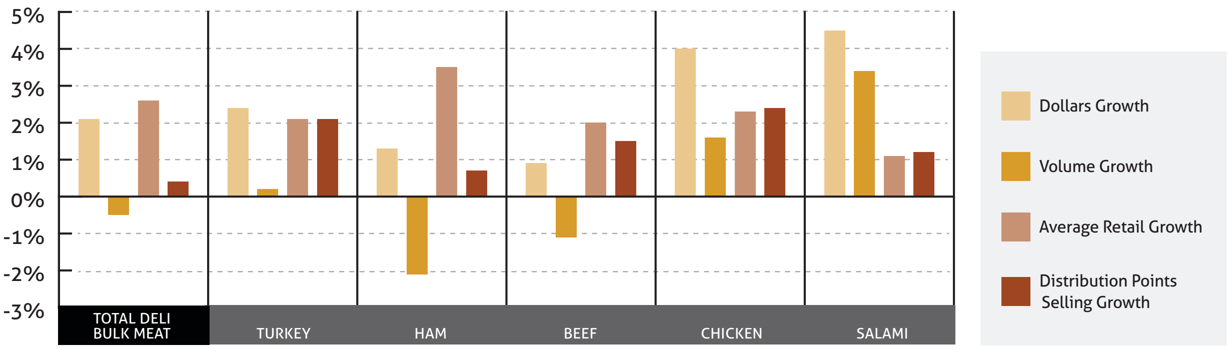


Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



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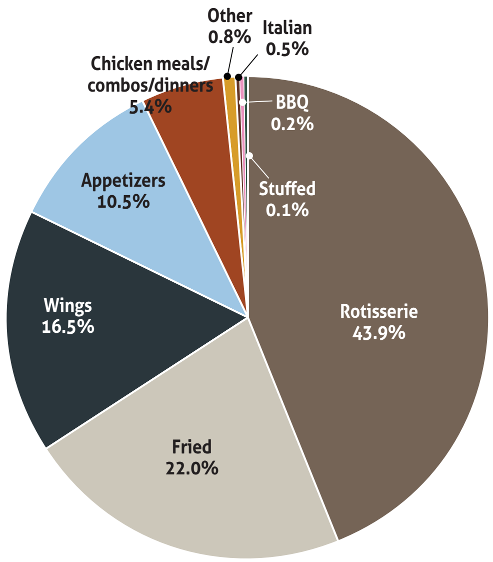

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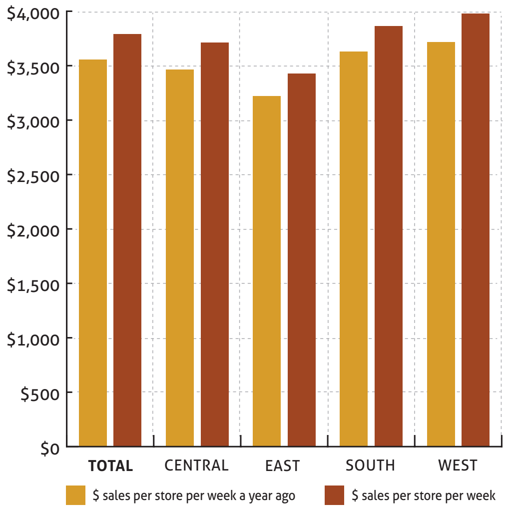
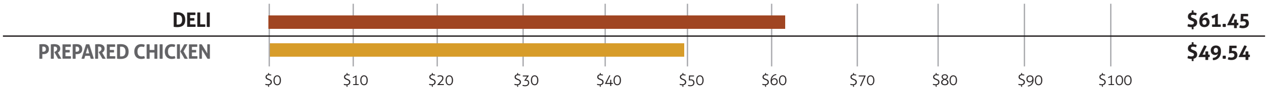


Average Basket Size Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons
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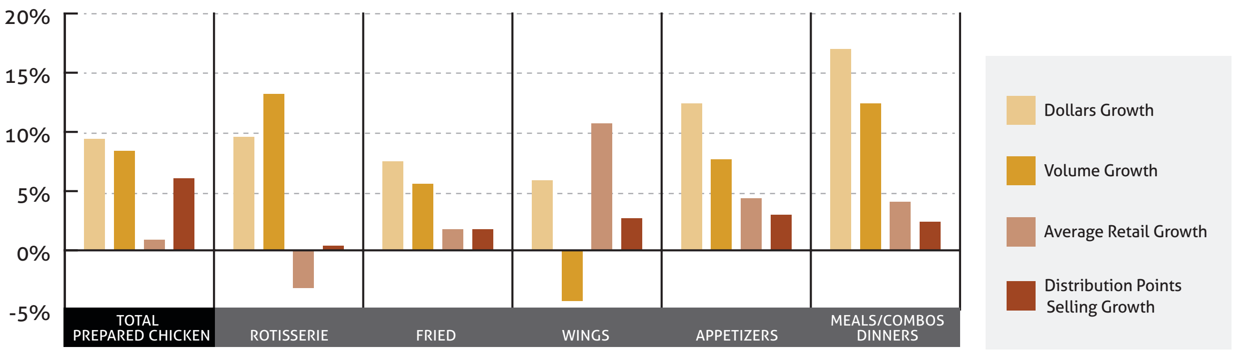

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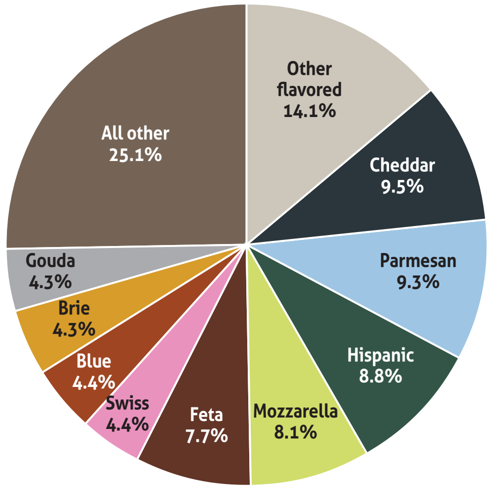
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14



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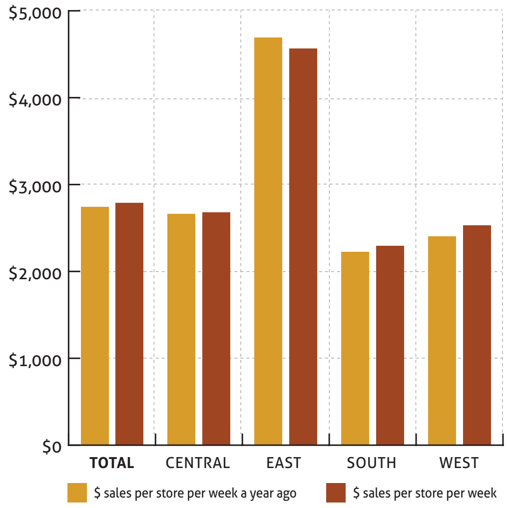
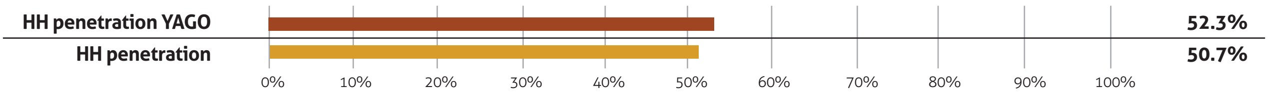
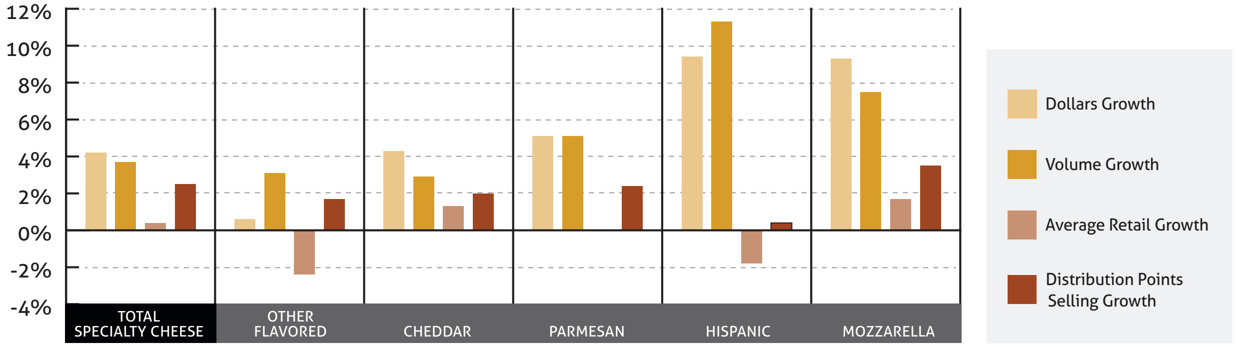


Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.

The Seafood Department

Fresh and prepared products continue to draw shoppers into the seafood department despite increases in average retail price.

{BY GRAHAM MCDOWELL, NIELSEN PERISHABLES GROUP}

SEAFOOD DEPARTMENT DOLLAR SALES continued to climb due largely to an uptick in pricing and decreased promotional activity. The seafood department contributed 4.8% to total fresh sales for the 52 weeks ended February 22. Among the five fresh departments, seafood posted the second-largest dollar sales growth behind produce with a 5.7% increase. The department maintained volume sales compared to the previous year.

Fresh seafood accounted for 79% of department dollar sales, with $5 billion in total sales for the tracked period. A 5.4% average retail price increase helped fresh seafood drive dollar sales up 5.7% while also contributing to flat volume sales.

Shrimp, which accounted for 30% of fresh seafood sales, was a major driver of dollar growth during the period, due largely to a 12.3% increase in average retail price. This increase contributed to a 6.8% volume decline.

Fin fish accounts for the largest segment of fresh seafood with 56.3% of total sales. During the latest 52 weeks, fin fish dollar sales grew 6% while average retail price increased 2.9%. However, fin fish shoppers were not deterred by price increases; volume increased 3.6% compared to the prior year. Unlike other fresh seafood categories, promotions on fin fish did not drive dollar and volume increases, likely due to already low average retail pricing compared to other fresh seafood categories.

Within the fin fish segment, salmon and tilapia were the highest contributors to overall sales with 37.9% and 25.2% of category dollar sales, respectively. Salmon saw a large increase in average retail price with a 7.9% jump, which contributed to a 5.5% gain in total dollar sales compared to the prior year. However, the large spike in retail price did adversely impact volume, which was down 2.3%. Two years ago, the abundant salmon supply drove the retail price down 8% for the category. The data shows a natural market reaction to the supply leveling out and the industry returning to previous average retail price levels.

Tilapia continues to grow in popularity as a more affordable option relative to other fresh fish segments. The average retail price of tilapia was $3.82 per pound compared to salmon at $7.69. The average retail pricing remained steady, and dollars and volume increased 5.3% and 4.6%, respectively.

While a smaller segment than fin fish and shrimp, crustaceans showed strong growth as dollars were up 8.9% versus the prior year. Crustacean volume increased 9.6% as average retail prices declined 0.7%. Overall, promotional activity played a large part in total crustacean sales, with 41.4% of the category's volume attributed to promotional activity. In comparison, the shrimp category only had 24.8% of promotional volume that contributed to total volume sales.

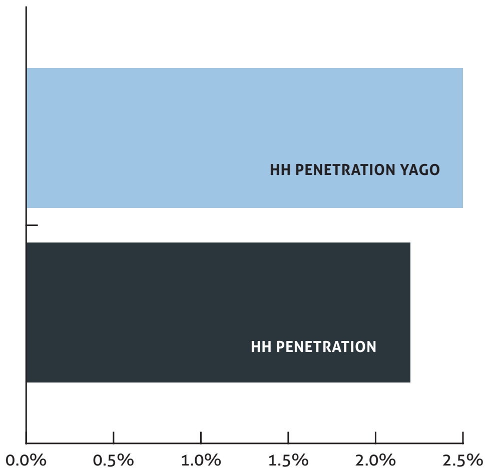
Looking beyond fresh seafood, consumer engagement with prepared seafood continues to grow. Prepared seafood dollar sales increased 4.4%, due largely to an increase in average retail price. Prepared seafood volume remained steady compared to the prior year.

Prepared fish posted increases in both dollars and volume, up 12.2% and 8.8%, respectively. In contrast, the prepared crustacean category was flat in dollar sales and down 2.9% in volume sales.

Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.

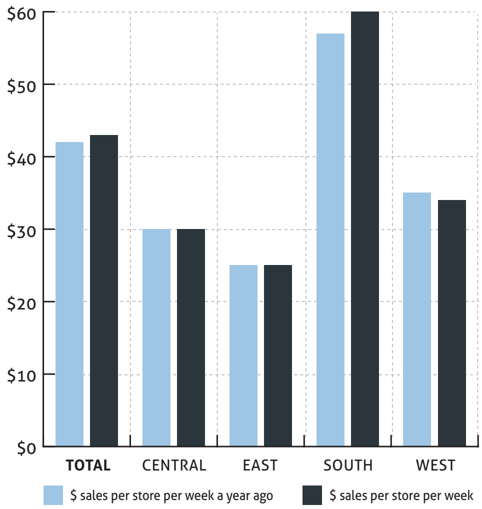
Household Penetration

Total U.S. for the 52 weeks ended 2/22/14

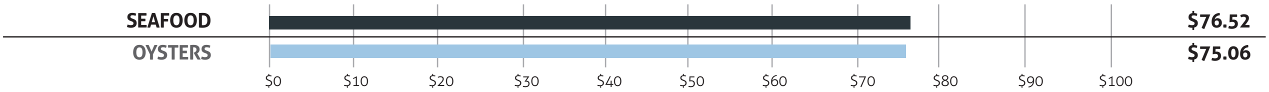


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

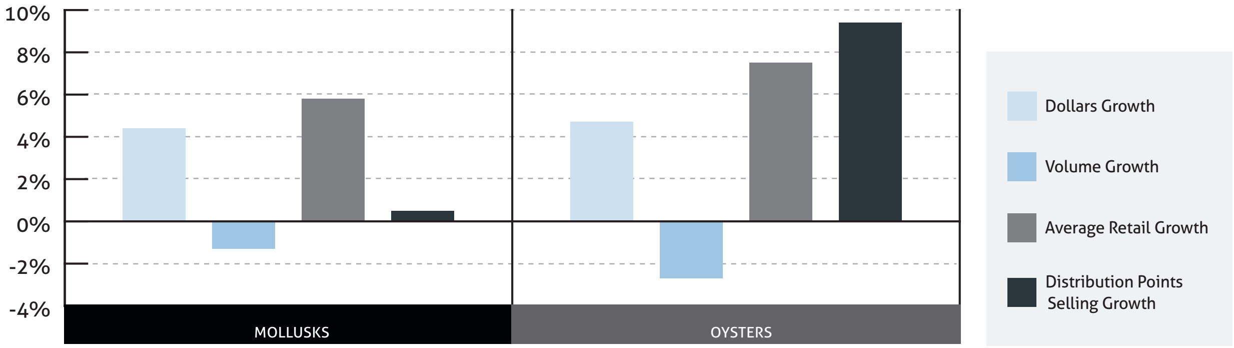


Average Basket Size Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

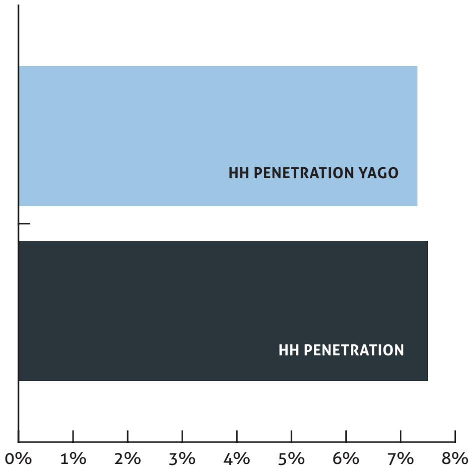
Total U.S. for the 52 weeks ended 2/22/14



Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.

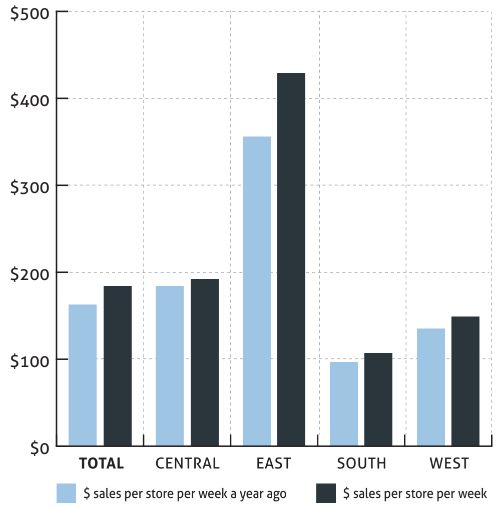
Household Penetration

Total U.S. for the 52 weeks ended 2/22/14

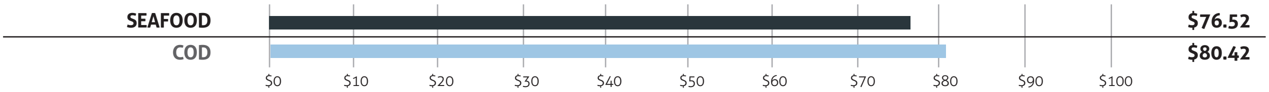


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

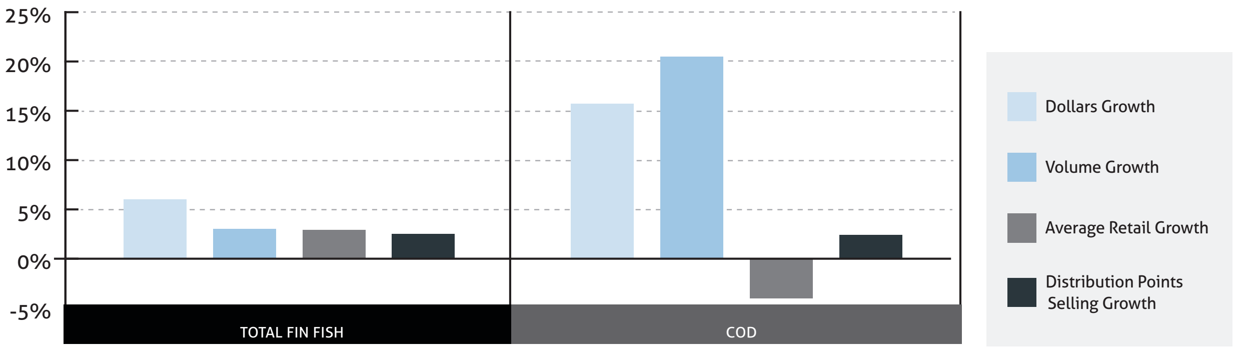


Average Basket Size Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



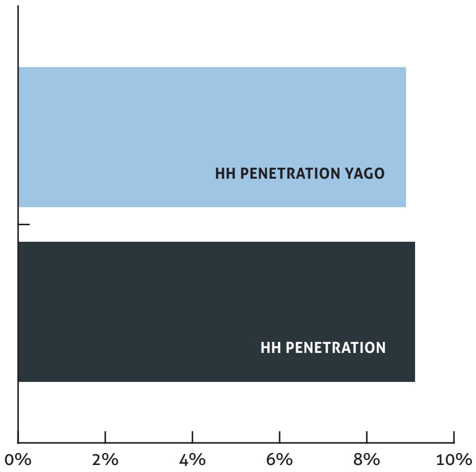
Perishables Group Keeping Your Business Fresh · FreshFacts Shopper Insights powered by Spire

Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.


Cod
Offer your customers the highest-quality cod available.
ALASKA SEAFOOD
2x
A WEEK

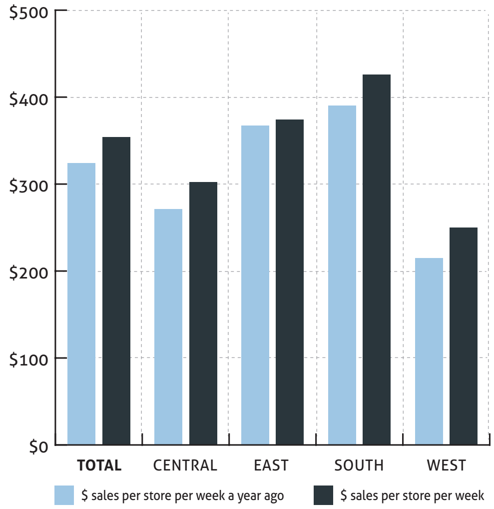
Household Penetration

Total U.S. for the 52 weeks ended 2/22/14



Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14



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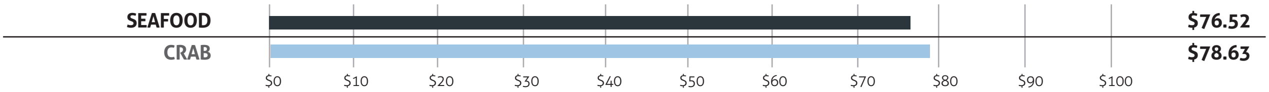
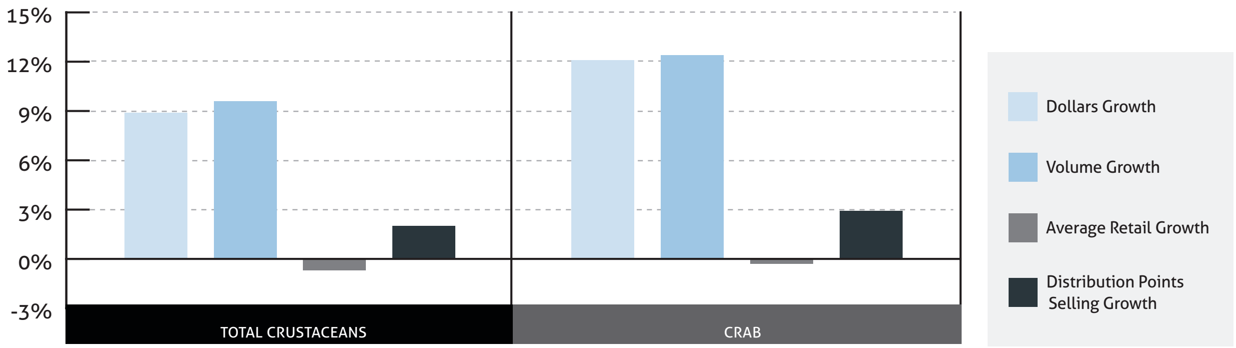


Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.

Snow Crab

Nature's healthiest convenience food, courtesy of Alaska.

Wild, sustainable, and fully-cooked, Alaska snow crab is easy to enjoy as cocktail claws, whole legs, split legs, or lightly scored 'Snap 'n Eat' sections. Low in fat and calories but high in protein, our snow crab shines as an appetizer, all-you-can-eat entrée, and in gourmet salads, soups, and seafood platters. Time-starved customers appreciate this convenient and delicious option that comes straight from the pure waters of Alaska – that's why 8 out of 10 look for our logo when buying seafood.

ALASKA SEAFOOD®

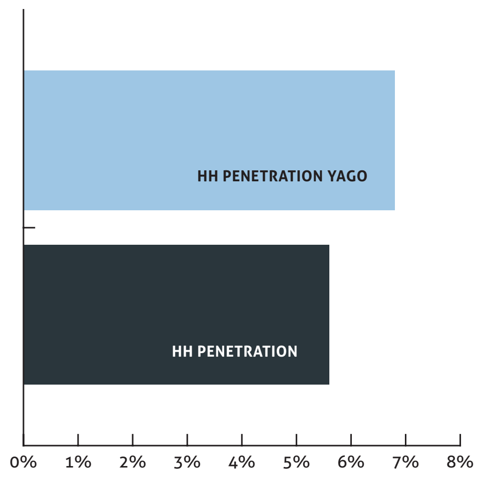
Wild, Natural & Sustainable®

For literature: www.alaskaseafood.org/retailers • **For assets:** alaskaseafood.creatorselect.com

For promotional support: Mark Jones 855-288-8841

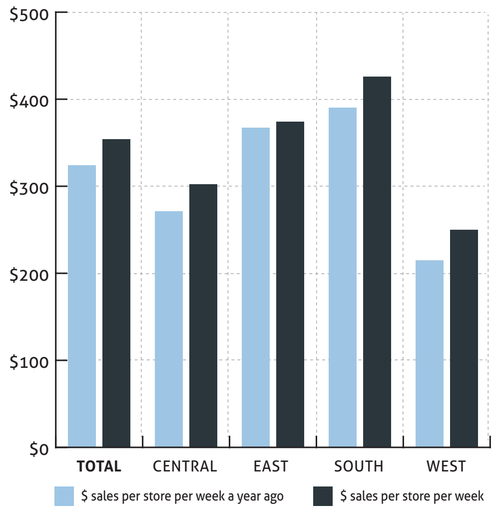
Household Penetration

Total U.S. for the 52 weeks ended 2/22/14

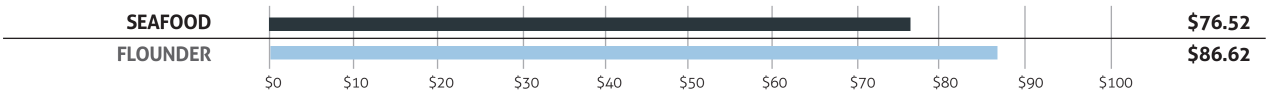


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

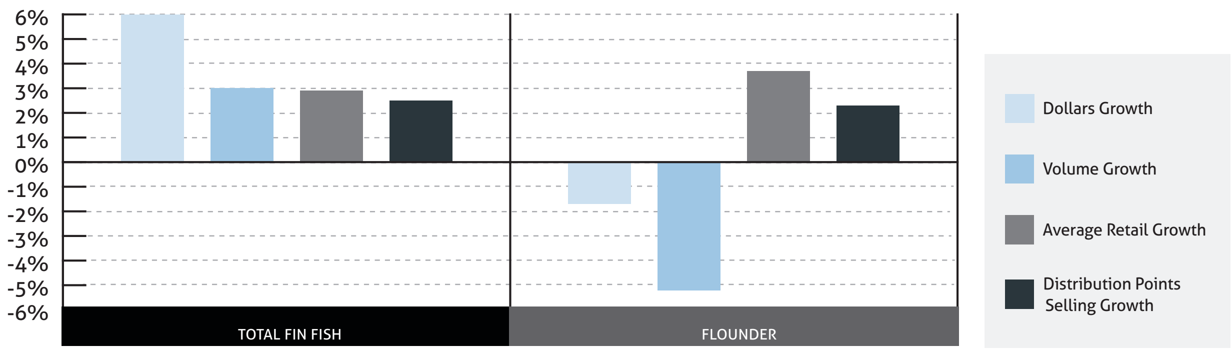


Average Basket Size Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.

Lean and tender, low calorie and delicious, wild Alaska sole is a healthy and economical option for seafood lovers. As with all Alaska Seafood, our sole is wild-caught and environmentally sustainable. It's quick and easy to prepare, with mild flavors that are ideal for health-minded consumers on the go and many popular ethnic dishes. Just make sure you buy the right brand – 8 out of 10 consumers say they look for our logo when buying seafood.

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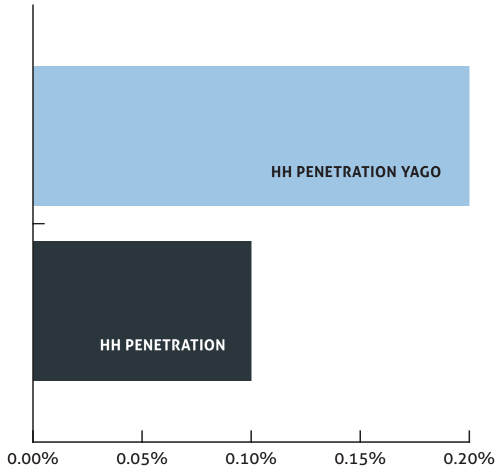
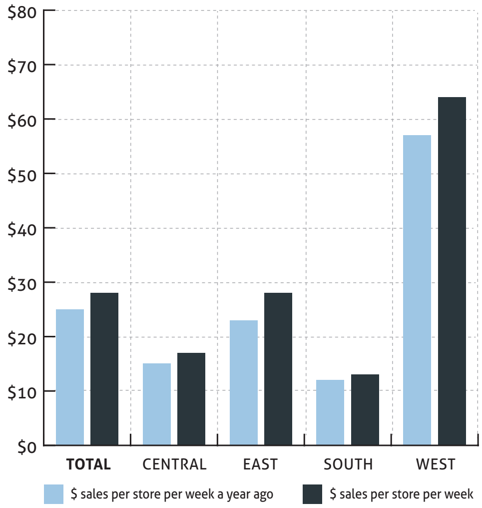
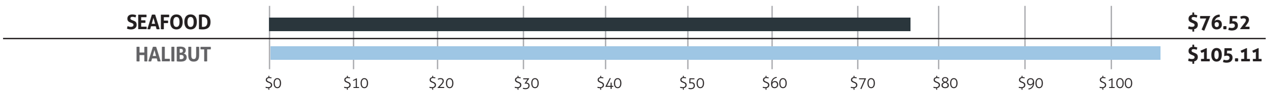
Household Penetration
Total U.S. for the 52 weeks ended 2/22/14



Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14



Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons
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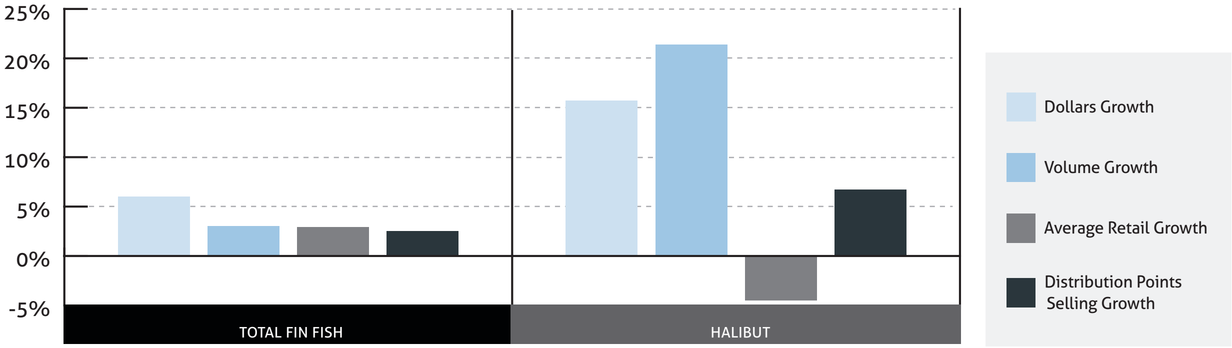
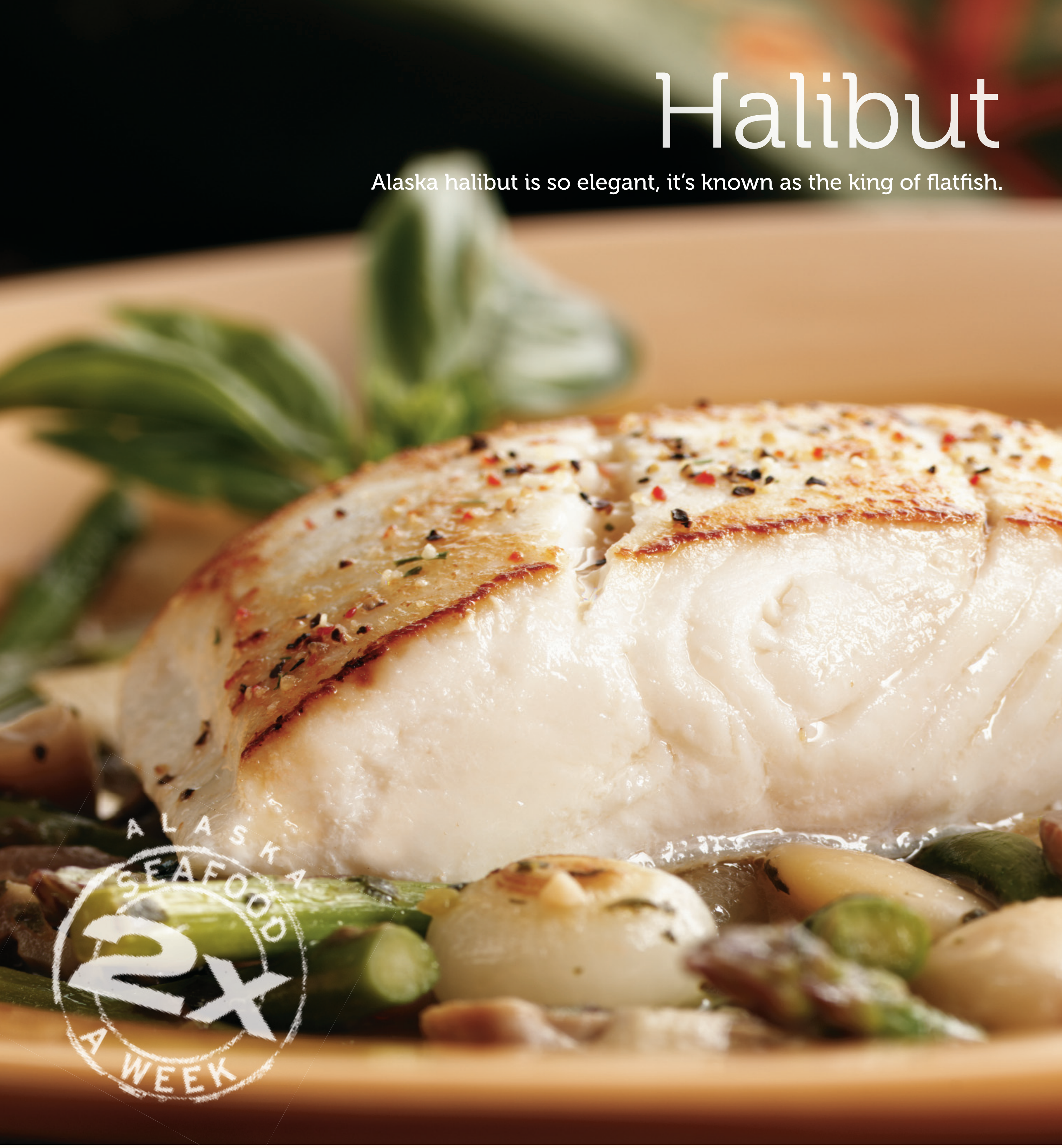


Perishables Group® Keeping Your Business Fresh® FreshFacts® Shopper Insights powered by Spire

Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.



Delicately delicious, with a firm and flaky texture, Alaska halibut is extremely versatile and easy to prepare. Consumers can enjoy it grilled, roasted, sautéed, or poached in healthy salads, hearty soups, exquisite entrées, or the best fish and chips they've ever had. Our halibut is wild-caught in the pristine waters of Alaska, where we've set the international standard for environmental sustainability. That's why 80% of consumers say seeing our logo increases their likelihood to purchase.

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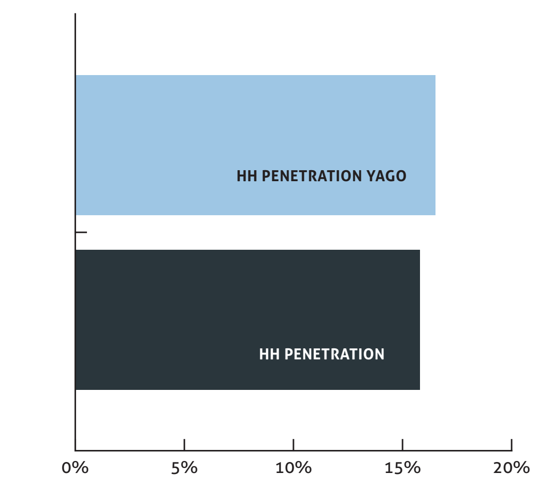
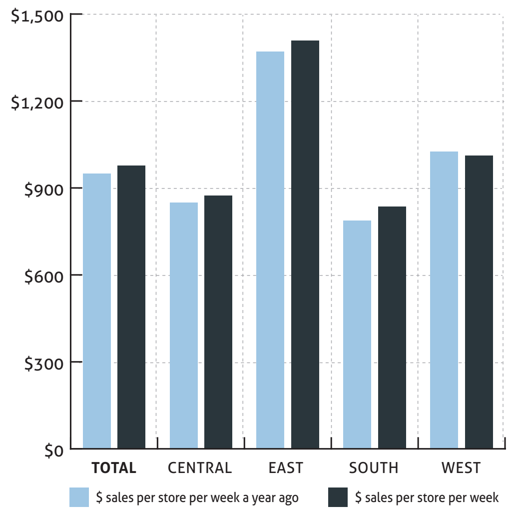
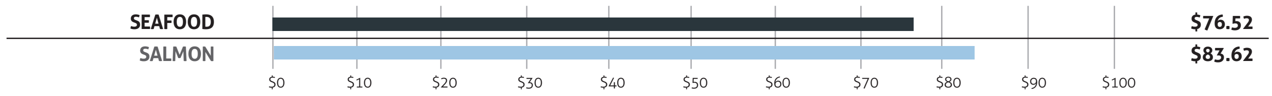


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14



Average Basket Size Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

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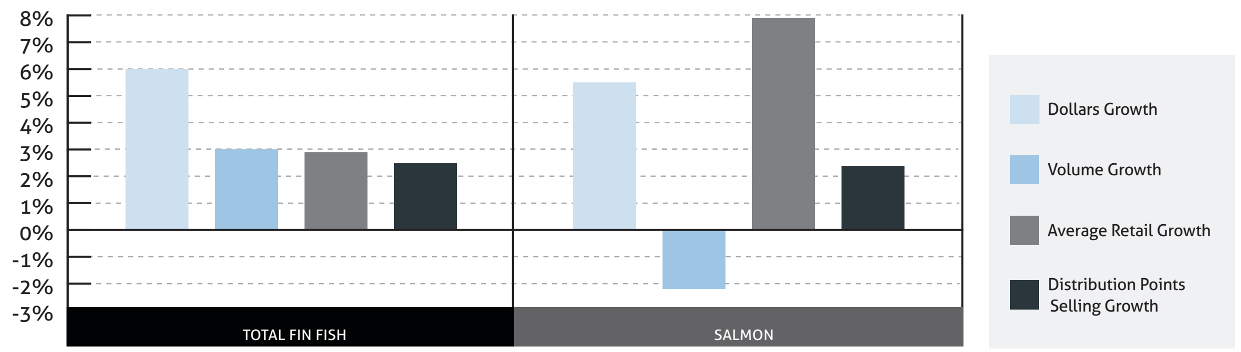

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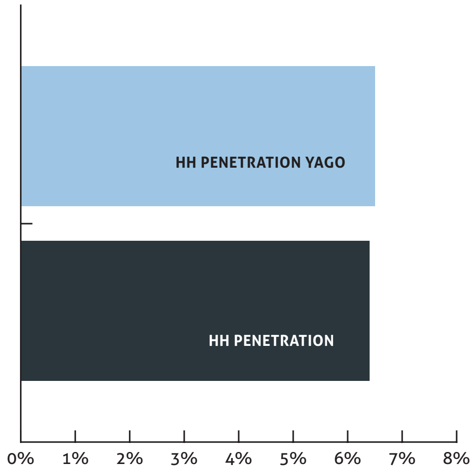

Average Weekly Dollar Sales by Region

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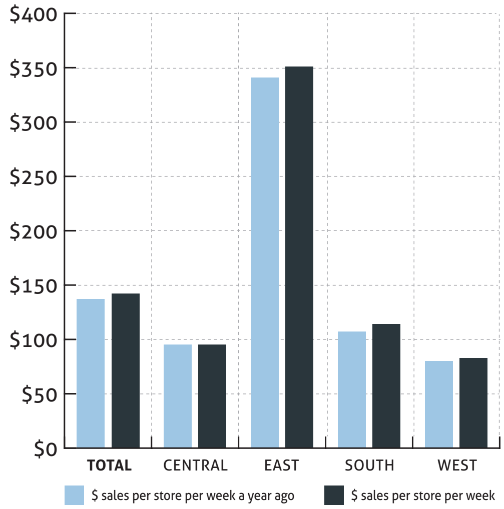
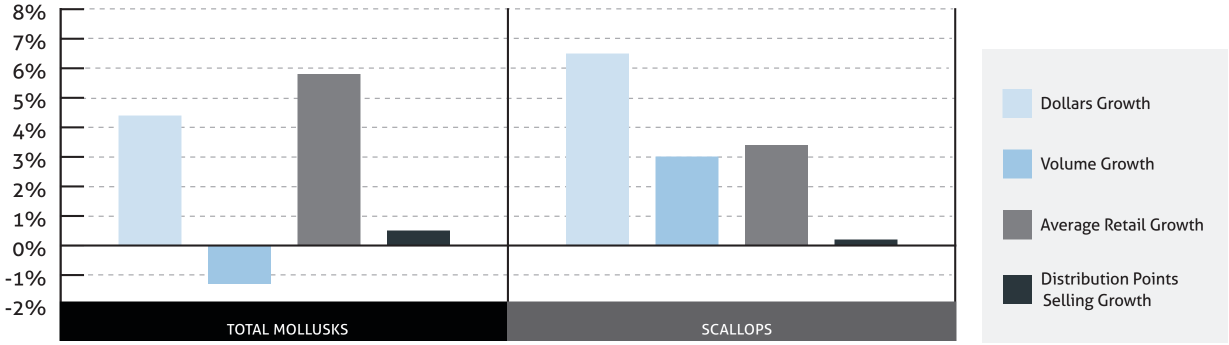


Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



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Scallops

The world's best scallops call the Gulf of Alaska home.

Harvested from the unspoiled waters of Alaska, our legendary wild scallops are known for their large size, sweet meat, and melt-in-your-mouth texture. Not only are they an easy and amazing addition to any cook's culinary repertoire, but they're also low in calories and high in protein and omega-3 fatty acids. Best of all, we can offer this uncommon luxury year-round. Maybe that's why 80% of consumers say that seeing our logo increases their likelihood to purchase.

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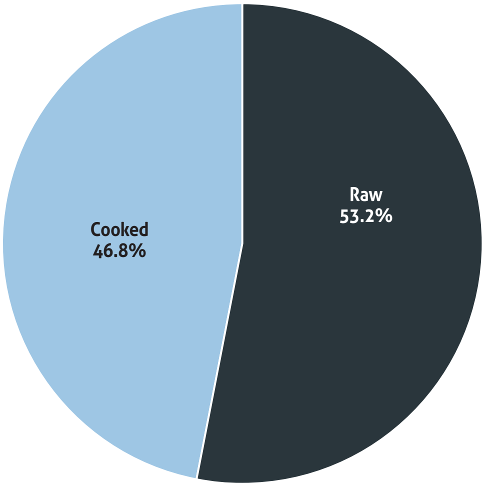
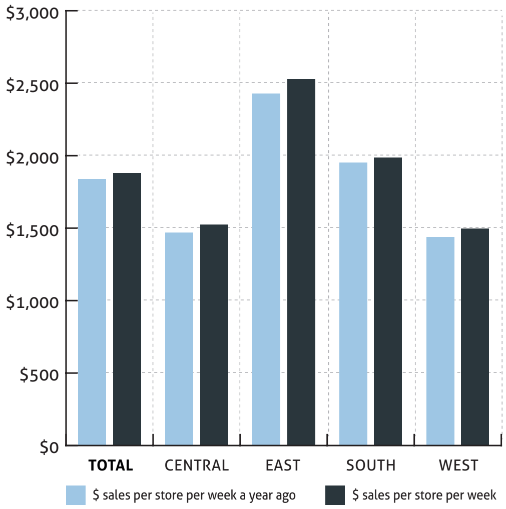
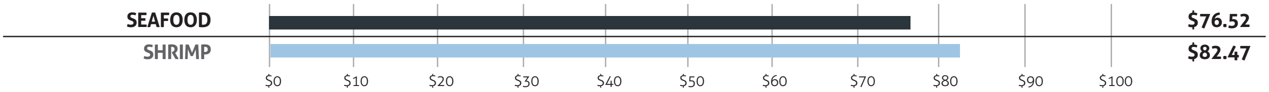
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14



Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14



Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons
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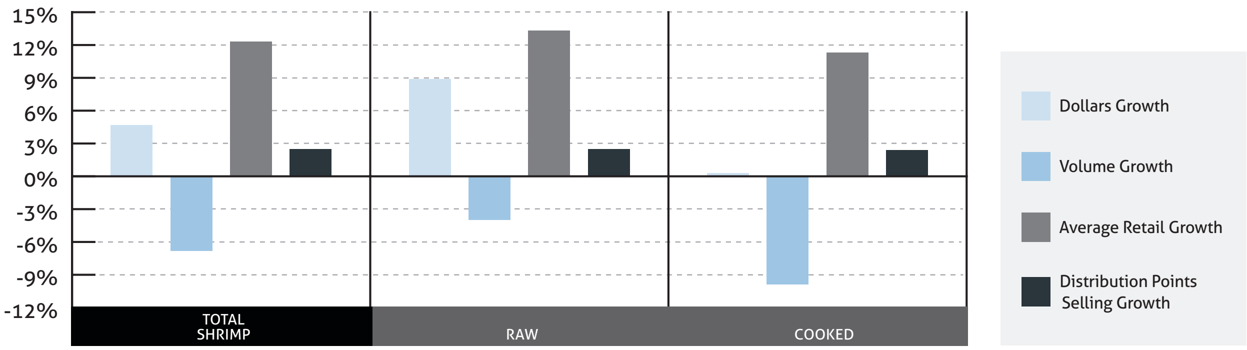

Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.

Power of the Brand

To consumers, the Alaska Seafood brand speaks volumes.

It's as clear as the waters of Alaska: Your customers are looking for the Alaska Seafood Brand. For years, we've worked hard to maintain our position as the clear consumer choice by offering delicious and nutritious wild seafood that's available year-round.

Consumers know our nation's last frontier is truly unspoiled, with pure waters that are home to the world's finest salmon, whitefish varieties and shellfish. That's because Alaska pioneered the international standard for environmentally sustainable fisheries decades ago.

It's this dedication that makes merchandising Alaska Seafood by name the most powerful way to boost sales and inspire customer loyalty. Just ask seafood lovers!

ALASKA SEAFOOD®

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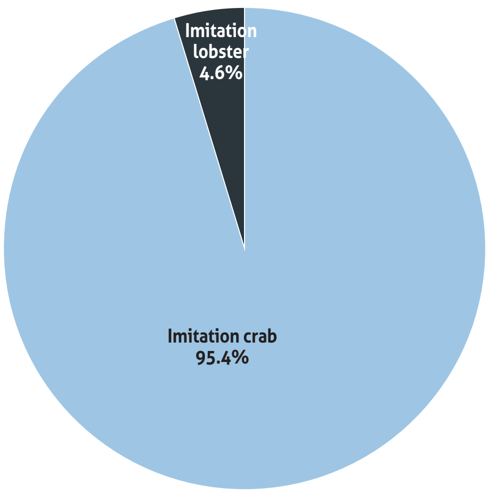
For more information or free in-store merchandising materials, contact Mark Jones toll free at **855-288-8841** or **mjones@alaskaseafood.org**

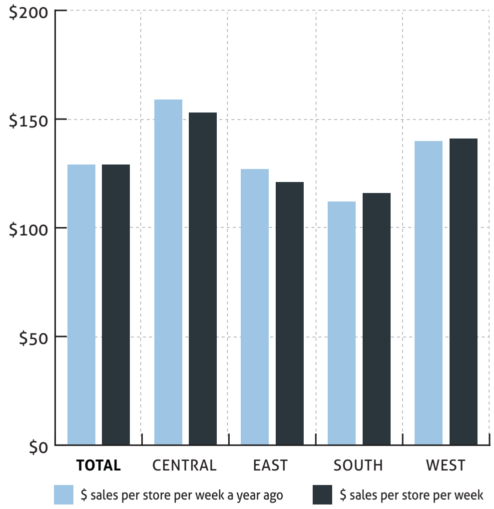
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14

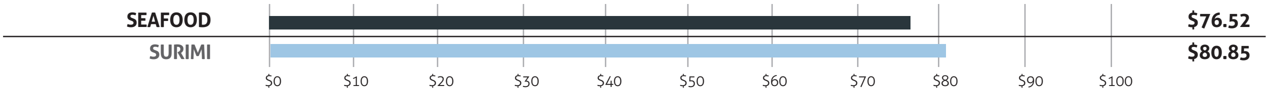


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

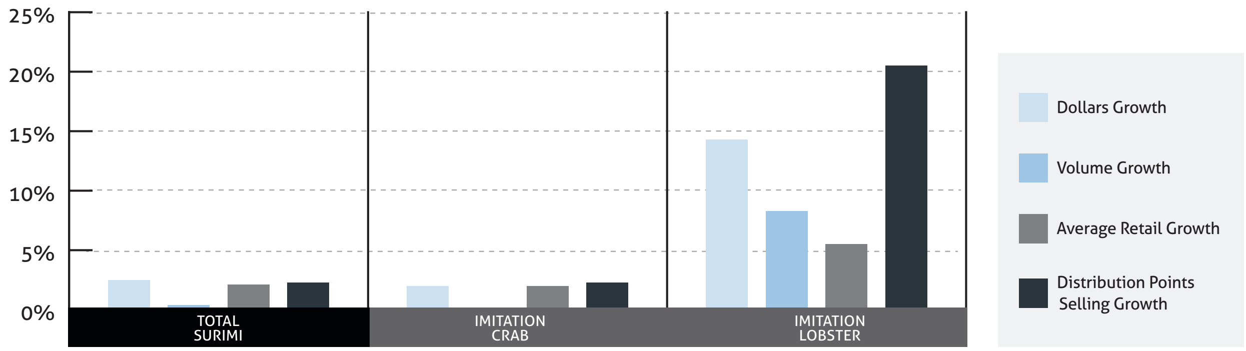


Average Basket Size Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.

Surimi seafood can be made from many different fish species. The highest quality surimi seafood is made with genuine Alaska Pollock harvested in the icy, pristine waters of Alaska. Our surimi is always succulent and sweet and a great source of protein and omega-3 fatty acids, and is naturally low in fat, cholesterol and calories. Pre-cooked and ready-to-use, there's no shell to remove and no waste. Ideal for any recipes that call for the flavor of lobster, shrimp, scallops and crab, Alaska surimi is available year-round. We think that's why 8 out of 10 shoppers look for our logo when buying seafood.

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The Produce Department

By staying in tune with shifts in shopper behaviors and trends, retailers can provide consumers with the right products and maximize growth potential.

{BY JULIETTE KING, NIELSEN PERISHABLES GROUP}

The produce department led dollar growth in the perimeter of the store, increasing sales at a faster rate than the meat, deli, bakery and seafood departments. During the 52 weeks ended February 22, fresh produce dollar sales increased 7.3%. A 4.0% increase in average retail prices contributed to the strong dollar growth. A 3.2% increase in volume demonstrates that despite rising retail prices, consumers are willing to pay more for products that meet certain needs, like health and wellness or convenience. With 32.5% of total perishables dollar sales and a 99.7% household penetration, the produce department should be a vital part of any retailer's winning strategy.

For the tracked period, the average ring of baskets containing produce was $56.29, the smallest of the five perishables departments. However, the average spend per trip increased 2.9% to $8.91, driven in part by higher pricing across the department. With the exception of bananas and grapes, each of the 10 top selling produce categories posted price increases from the previous year. For most categories, increased pricing did not deter shopper purchases. However, berries, which is the number one produce category in terms of dollar sales and has posted consistent growth for many years, had a slight decrease in volume sales as a cold spring limited production for the 2013 crop.

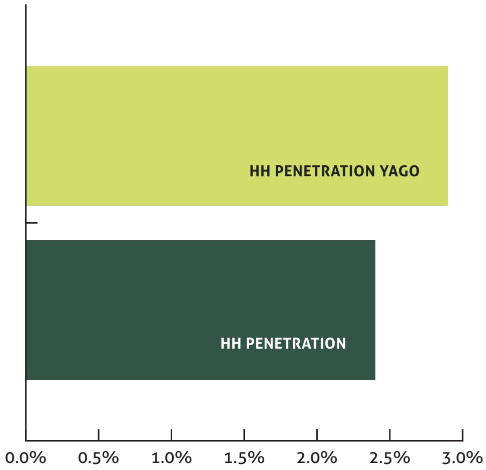
When looking at the produce categories with the highest dollar growth, a few consumer trends are brought to light. Fueled by cooking blogs and recipe websites the "foodie" movement continues to drive consumer engagement with food and cooking. Health and wellness is also a growing trend, especially in the produce department. Cooking greens led the entire department with the largest dollar growth from the prior year (24%), driven by kale with an astounding 102% increase from the prior year. Cooking vegetables grew nearly 11%, driven by Brussels sprouts, root vegetables and cauliflower, all of which had double-digit dollar growth. Ensuring a consistent offering of these traditional cooking-focused categories can attract that "gourmet at home" consumer and a larger basket ring.

Consumer demand for convenience is another trend impacting the produce department. Products that provide additional value to consumers continue to increase item count. For example, value-added vegetables—which includes meal prep, snacking and trays—increased 8.5% while value-added fruits (fresh-cut fruit, overwrap and jar and cups) increased 4.1%. Both categories posted dollar increases, 13.2% and 10.9%, respectively, compared to the previous year. Organic produce, while still less than 7% dollar share of the department, increased sales 21.6% from the prior year, outpacing conventional items' 6.8% growth. While retailers should not miss out on the growth of organics, the importance does vary by category. At least one organic offering in the following categories is a must, as more than 20% of their sales come from organics: cooking greens, healthy alternatives, carrots, herbs/spices/seasonings and packaged salad.

Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.

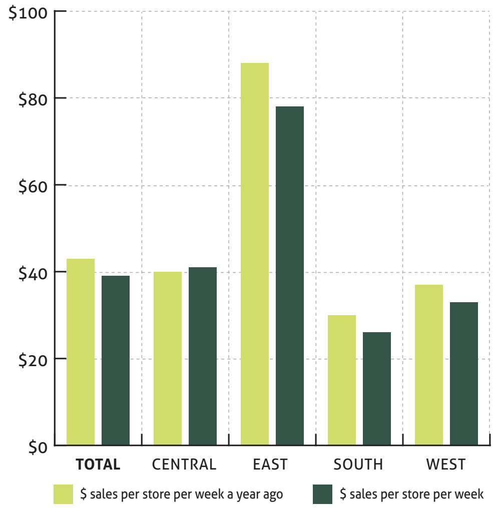
Household Penetration

Total U.S. for the 52 weeks ended 2/22/14

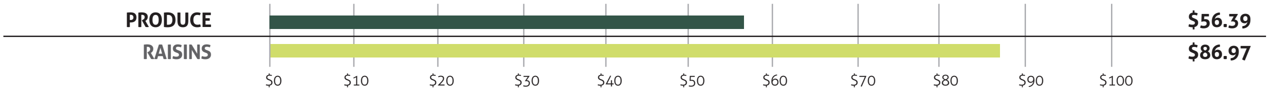


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

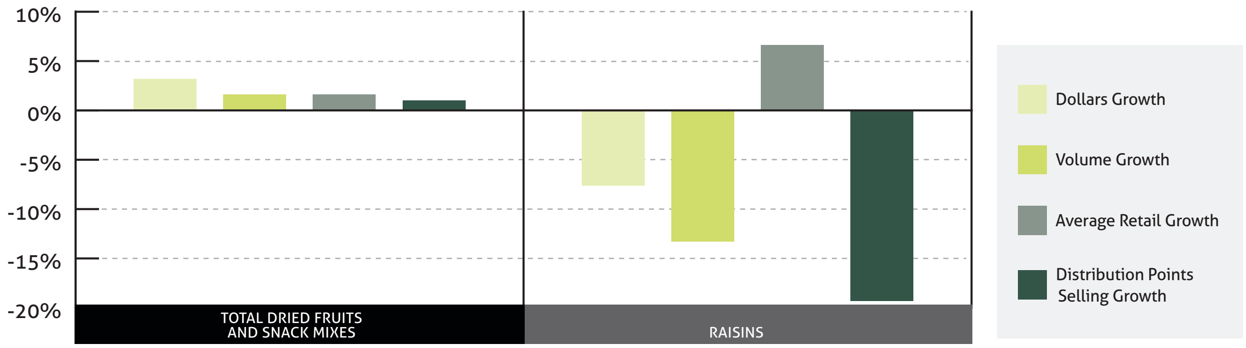


Average Basket Size Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



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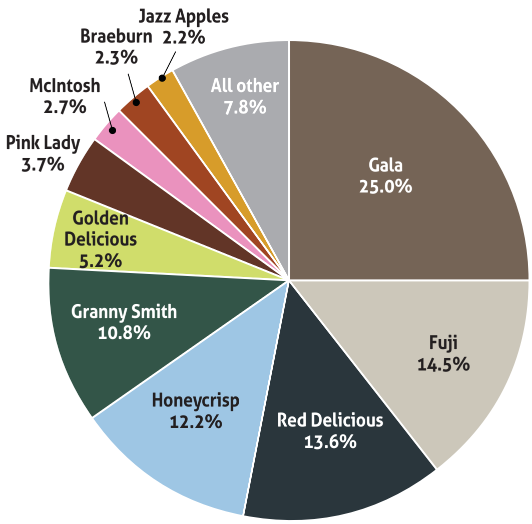
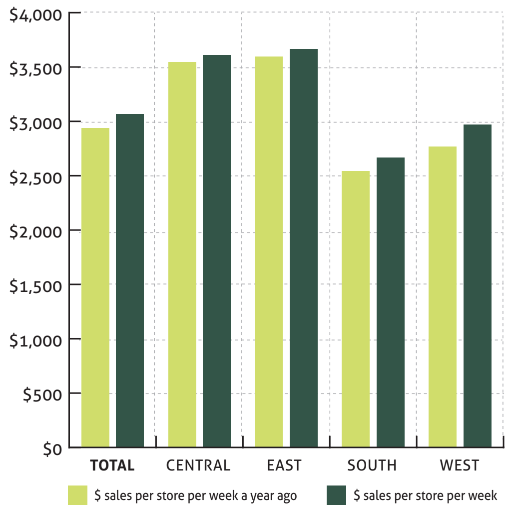
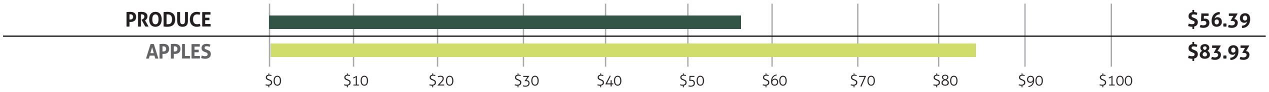
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14



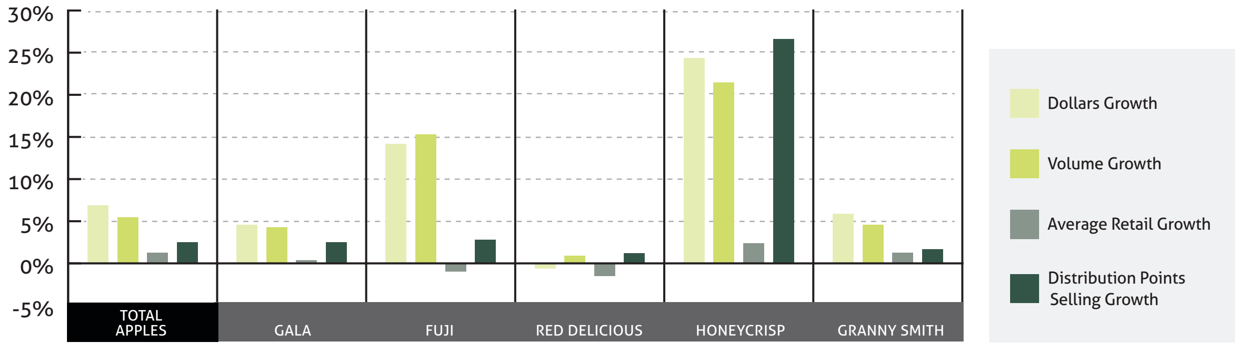
Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14



Average Basket Size Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14



Perishables Group FreshFacts Shopper Insights

Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.

Ralph faithfully tends to his orchards.

Ralph, an orchard manager and loyal Rainier employee for over 35 years, oversees a complicated yet highly productive block of Honeycrisp apples. Even the hilly terrain and windy conditions are no match for his strong faith and proven farming techniques which ensure the finest quality fruit.

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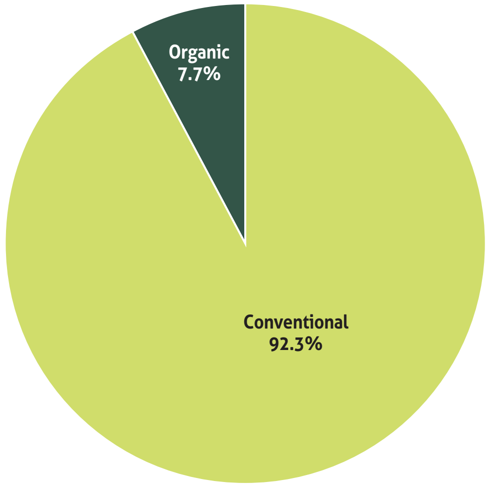
Apples, Pears, Cherries & Blueberries | 509-697-6131 | Selah, Washington | rainierfruit.com

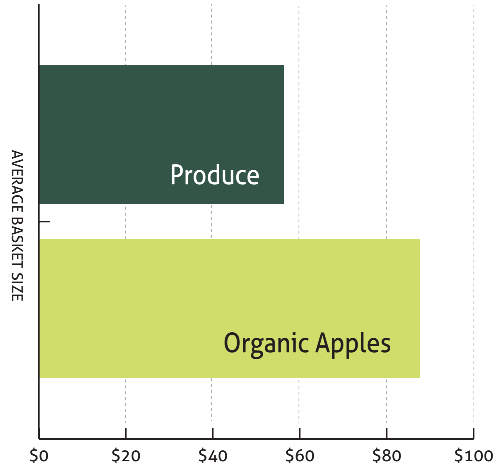
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14

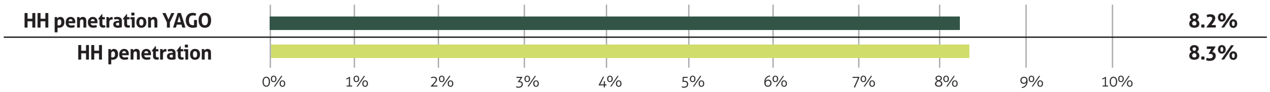


Average Basket Size

Total U.S. for the 52 weeks ended 2/22/14

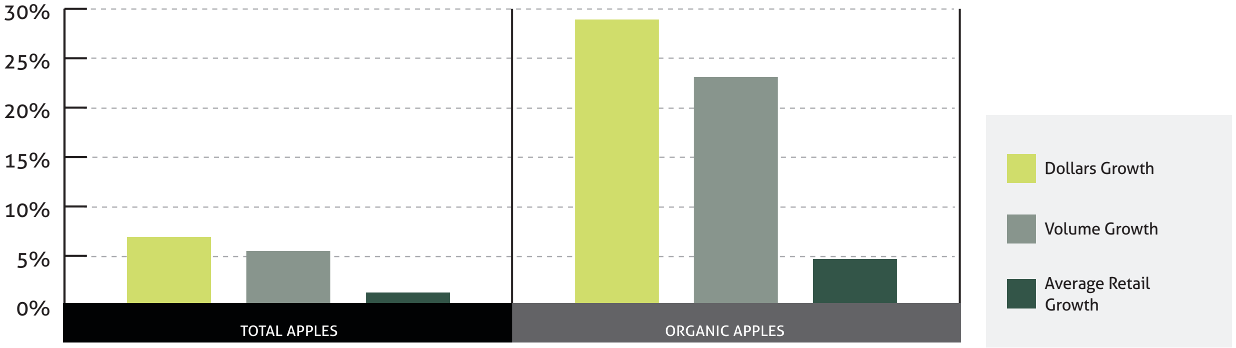


Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.

#1 Selling Branded Organic Apples*

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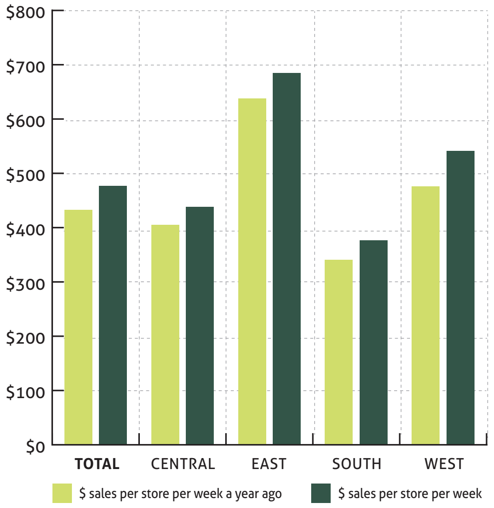
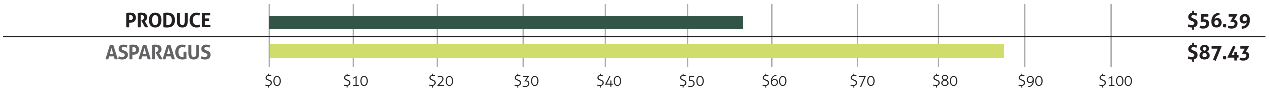
*Source: Nielsen Perishables Group *FreshFacts*®, Organic apple sales, September 1, 2013 to March 30, 2014. Excludes all private label and unbranded organic apple products.

Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

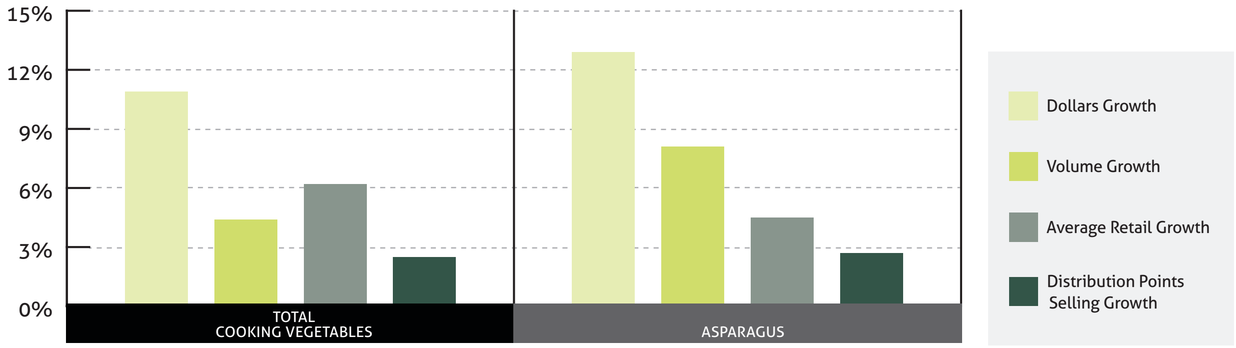
Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14



Average Basket Size Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14



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Household Penetration

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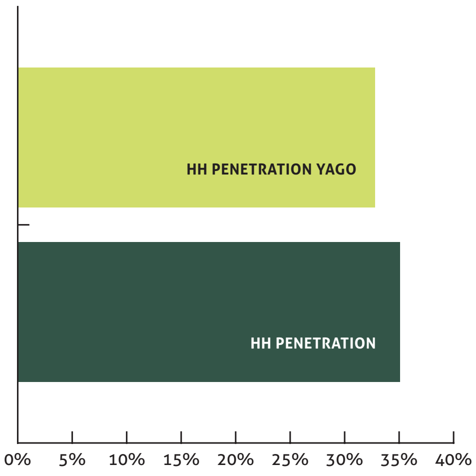
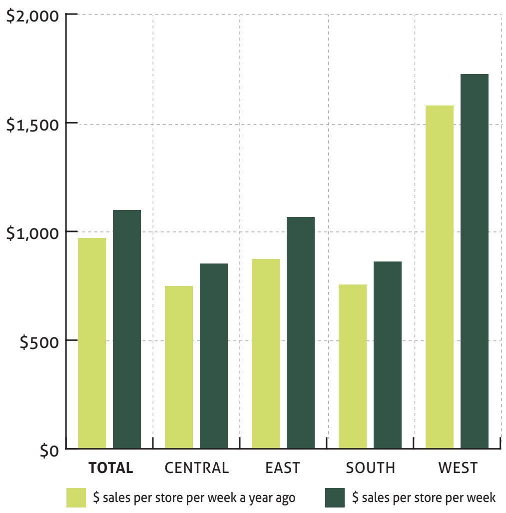


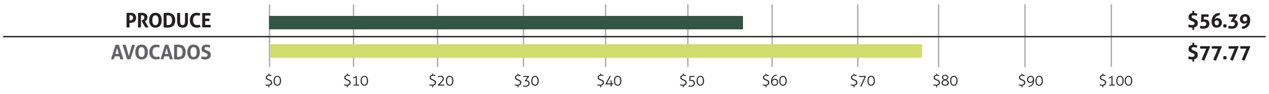
Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14



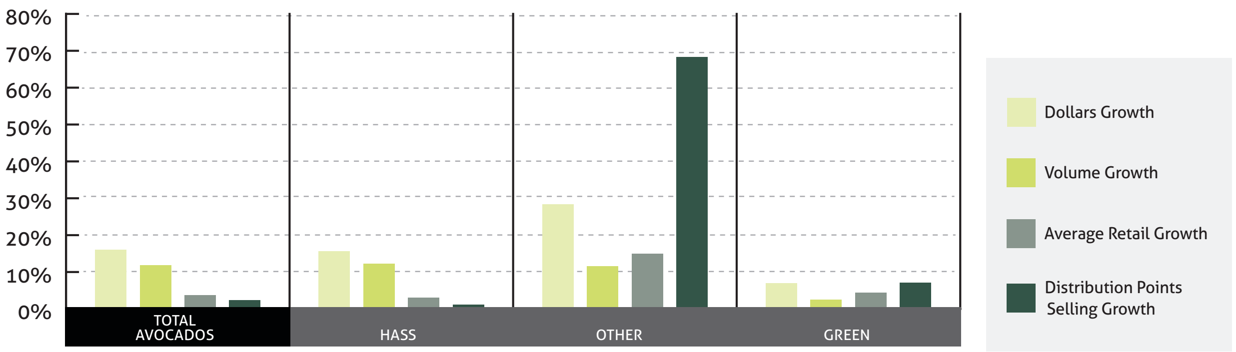
Average Basket Size

Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



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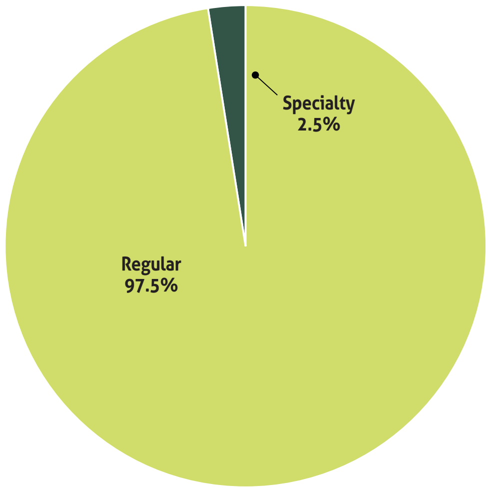
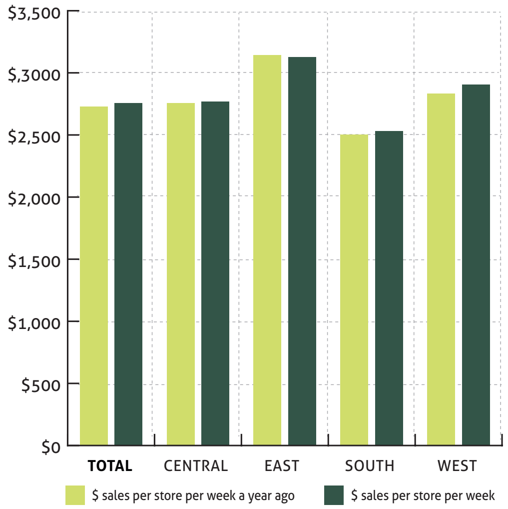
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14

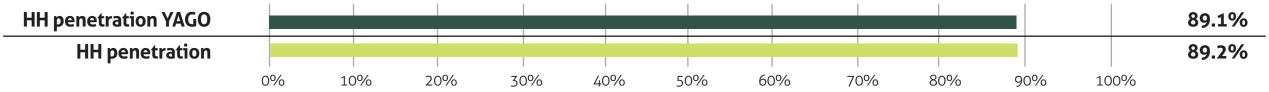


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

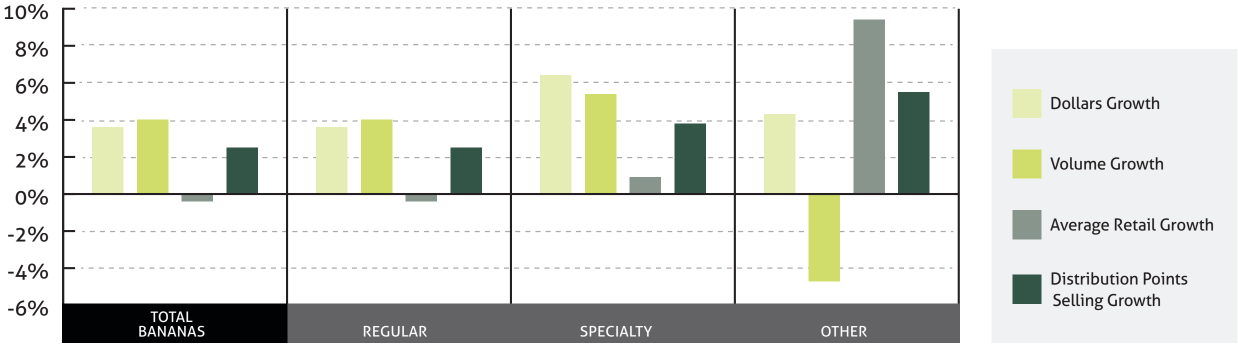


Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



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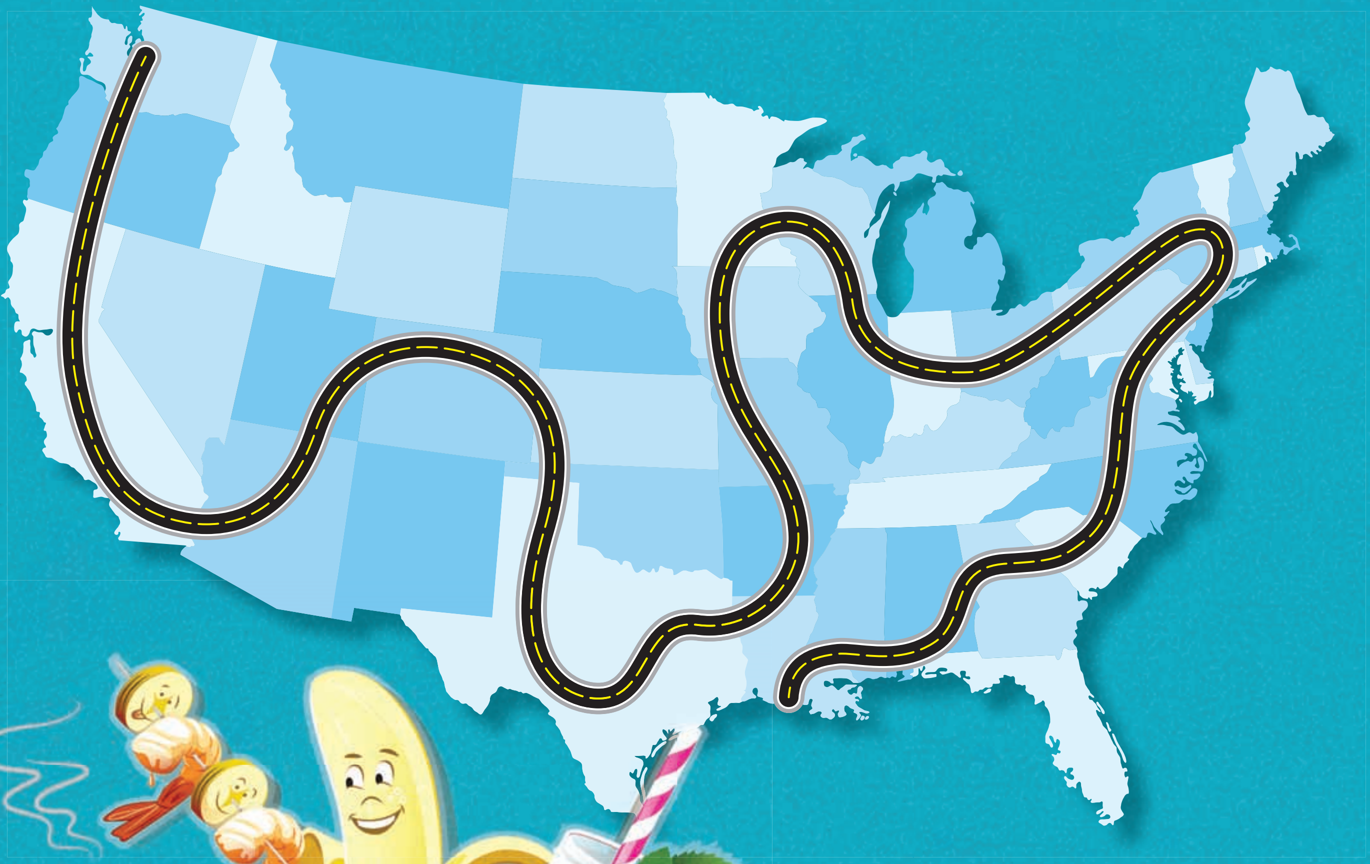
Peel the love™ Dole®

KEEP YOUR EYES ON THE ROAD

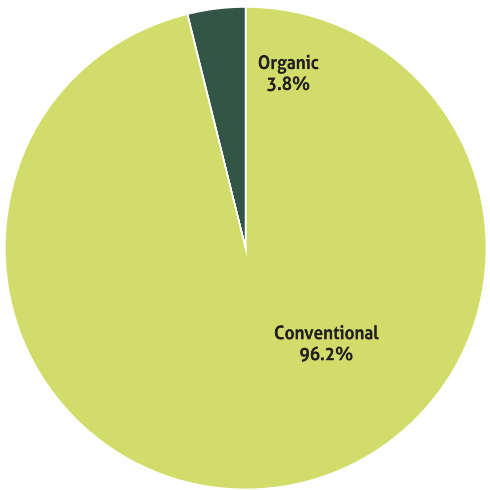
Dole's "Peel the Love Summer Tour"
is coming back with even more stops and
promotional opportunities than last year.



Contact your Dole representative to provide you with materials and help you schedule a Peel the Love event.

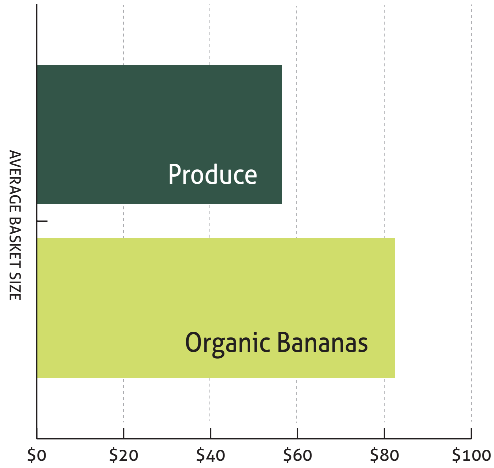
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14



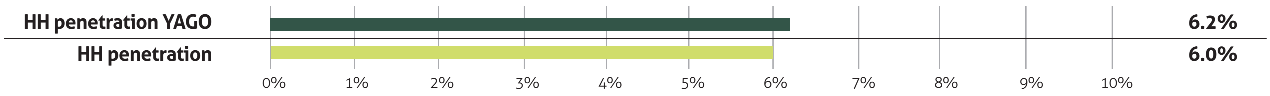
Average Basket Size

Total U.S. for the 52 weeks ended 2/22/14



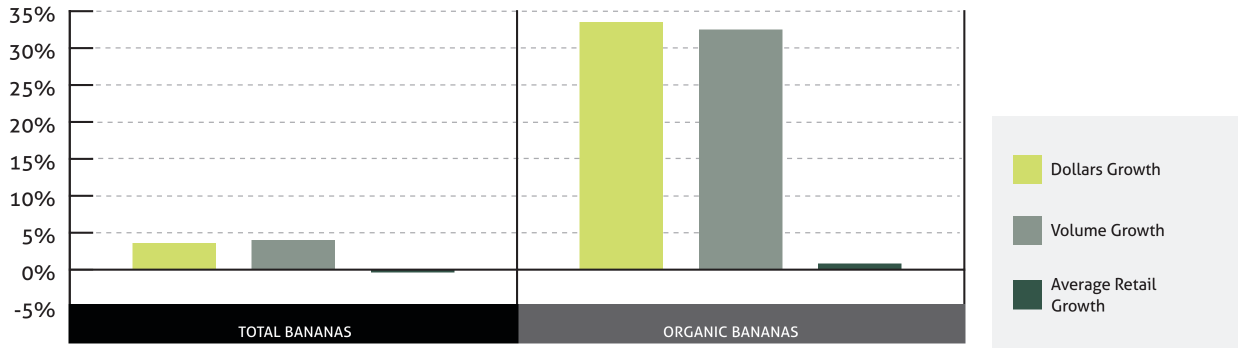
Household Penetration

Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



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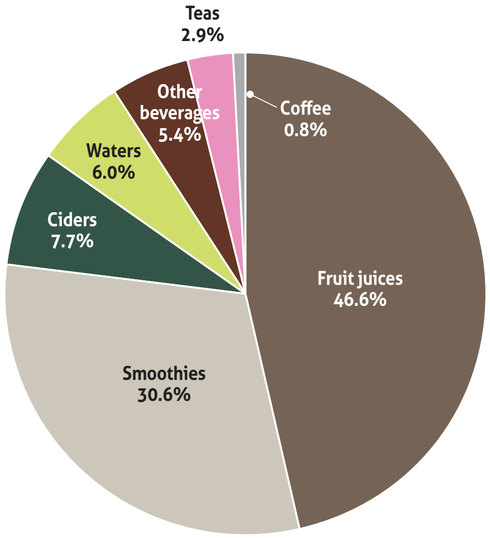
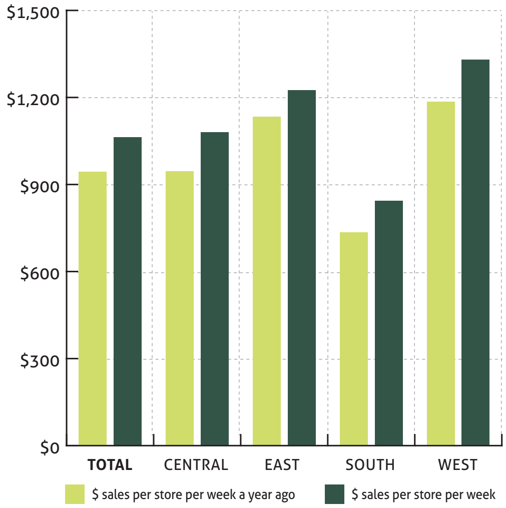
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14

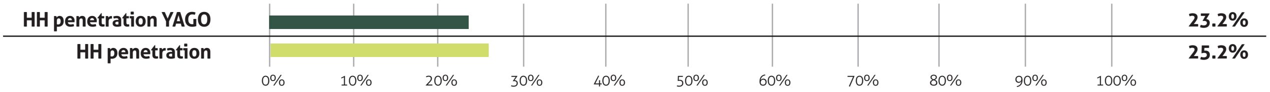


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

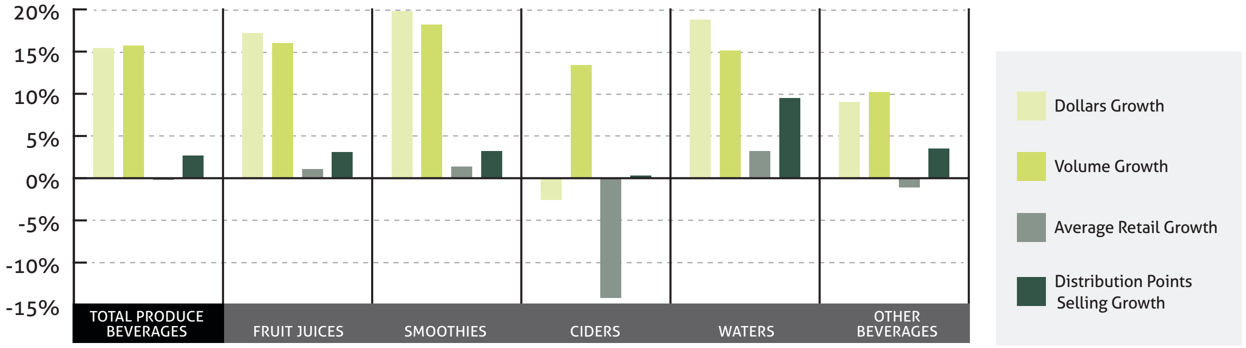


Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



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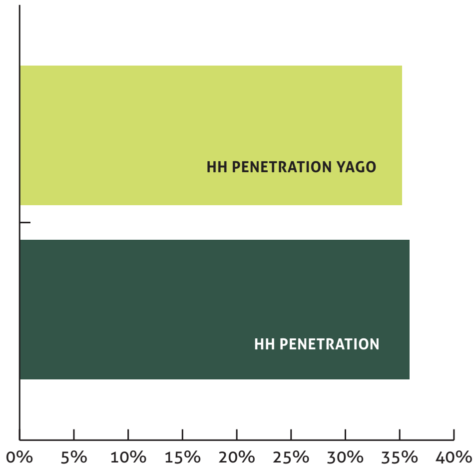
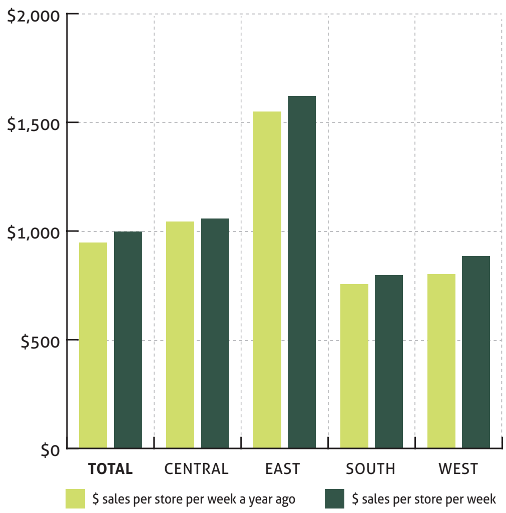
Household Penetration

Total U.S. for the 52 weeks ended 2/22/14

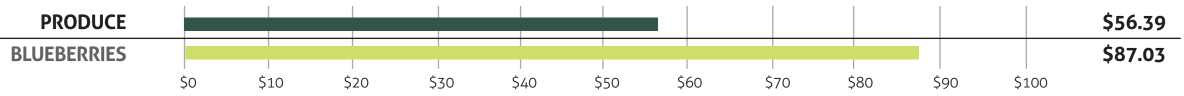


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

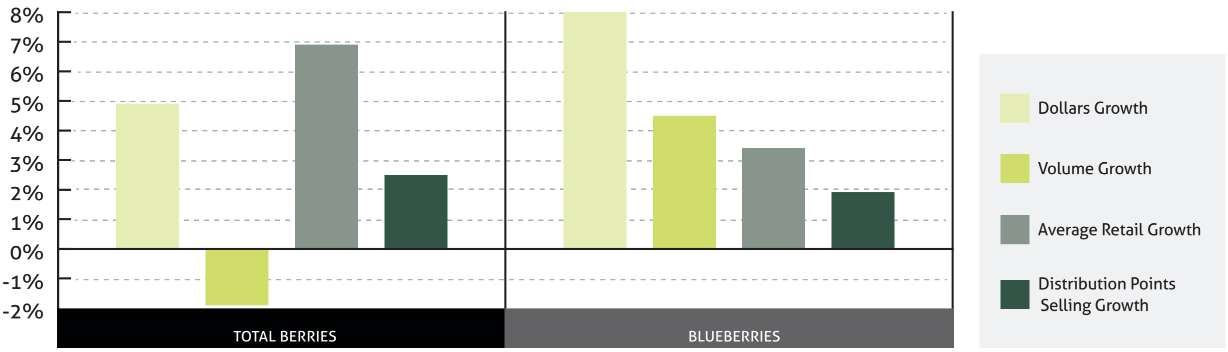


Average Basket Size Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



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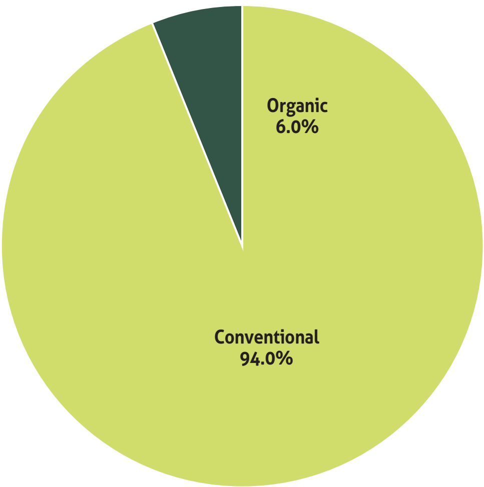
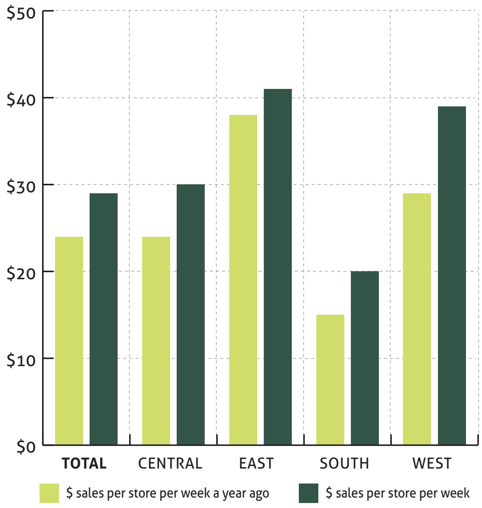
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14

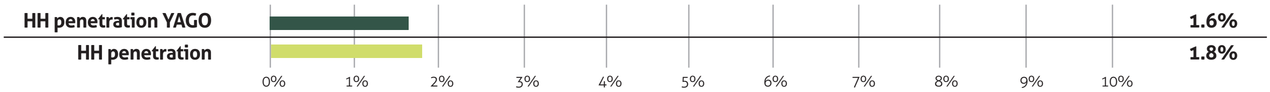


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

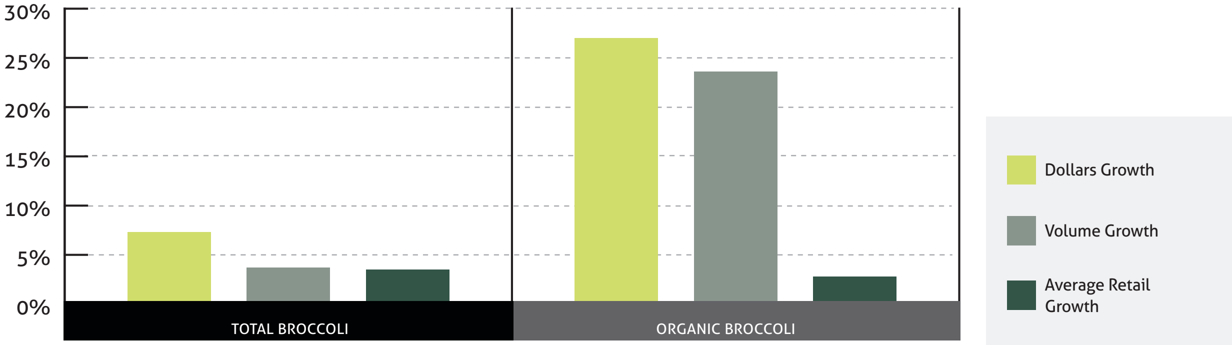


Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



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Share of Category Dollars

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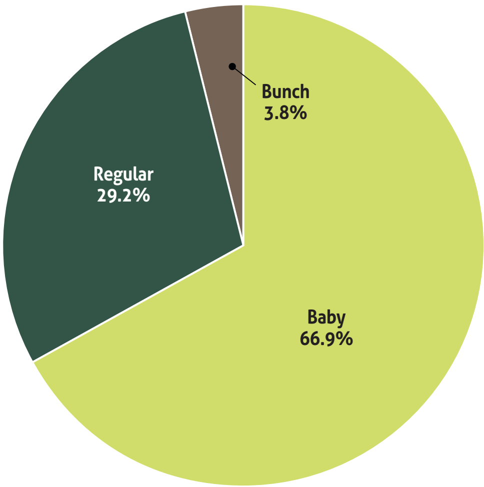
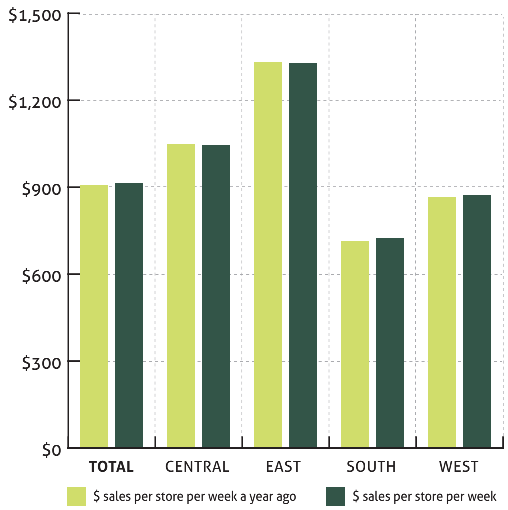


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14



Average Basket Size Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons

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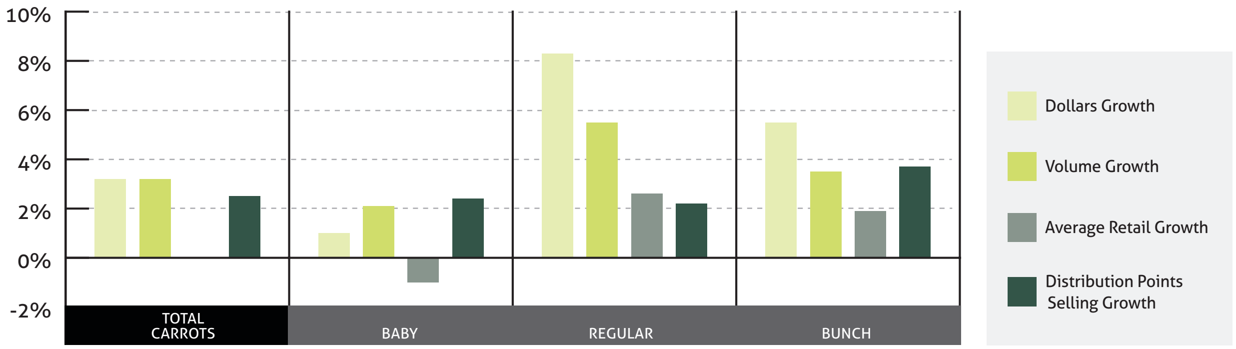

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Baby
CARROTS
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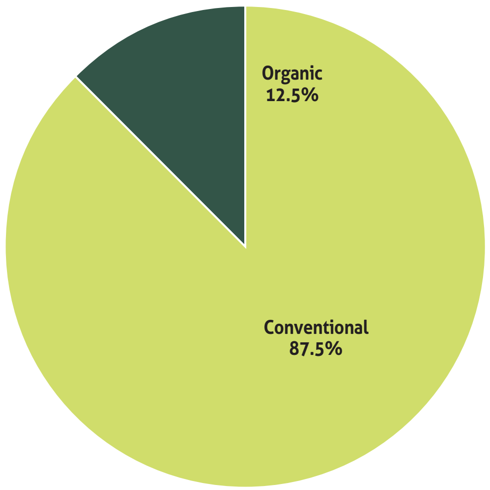
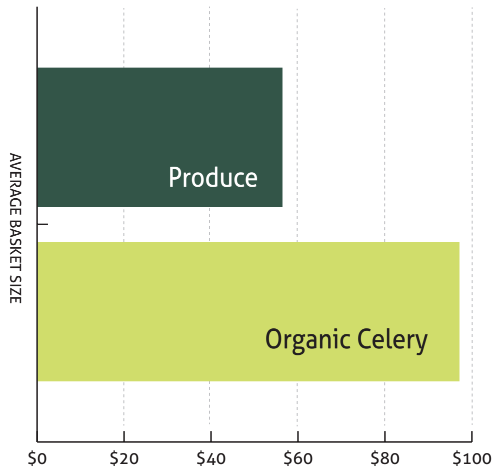
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14

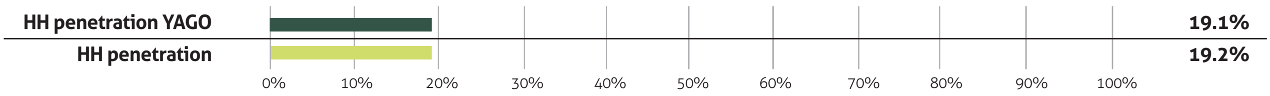


Average Basket Size

Total U.S. for the 52 weeks ended 2/22/14



Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

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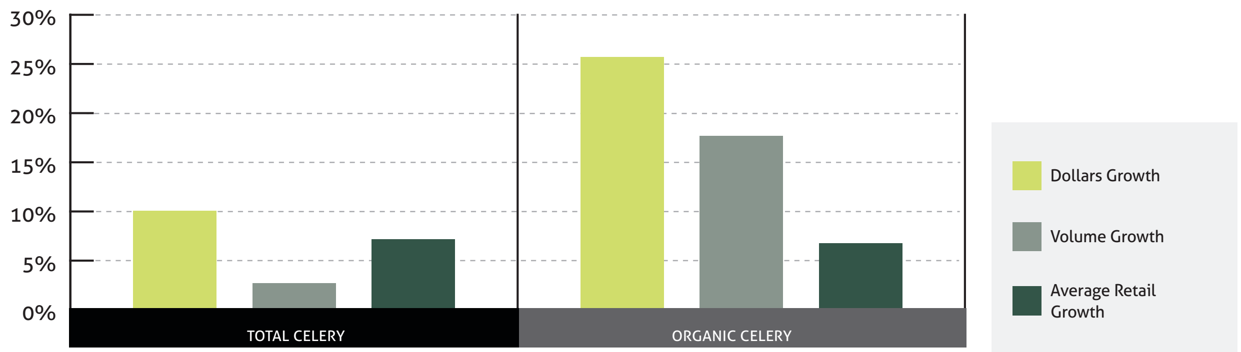

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Share of Category Dollars

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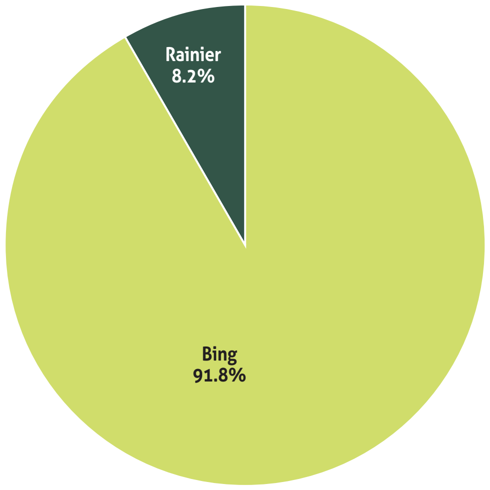
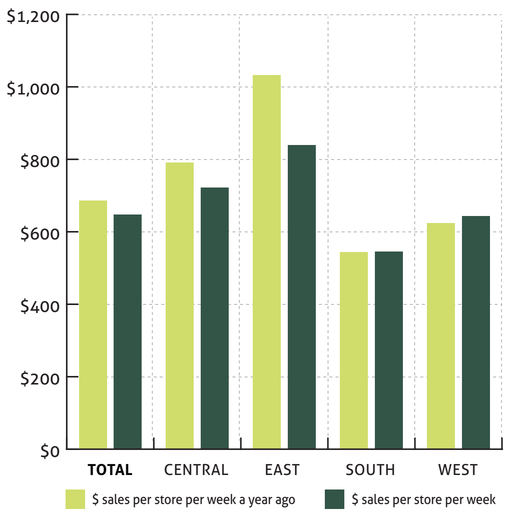
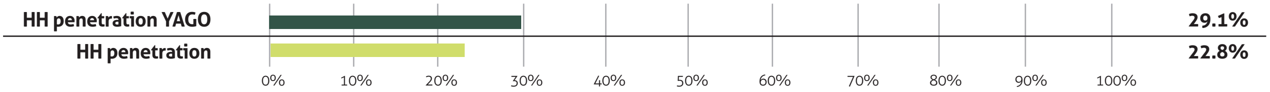


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

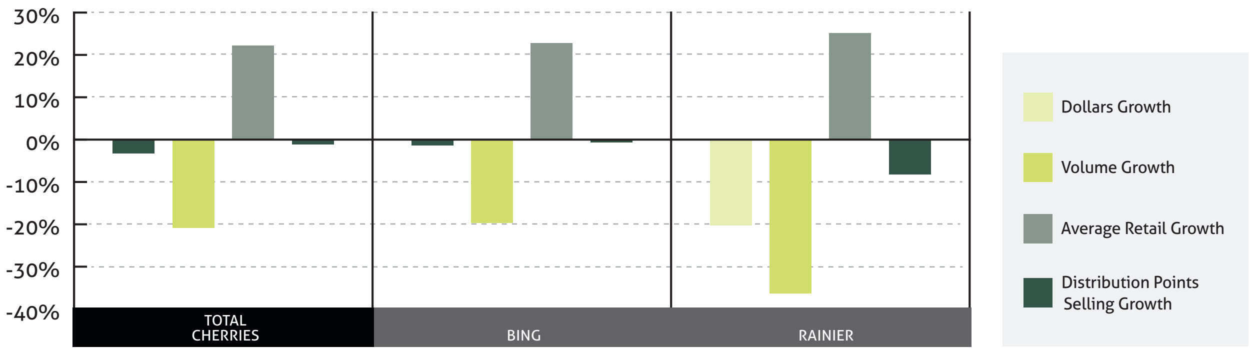


Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.

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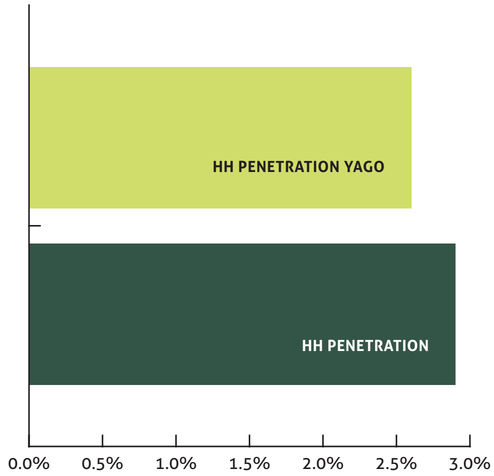
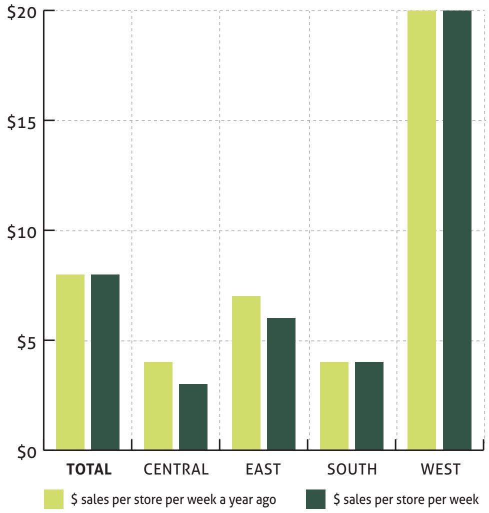
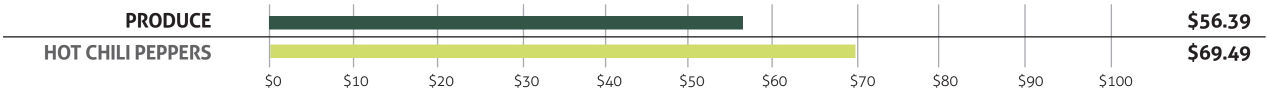
Household Penetration
Total U.S. for the 52 weeks ended 2/22/14



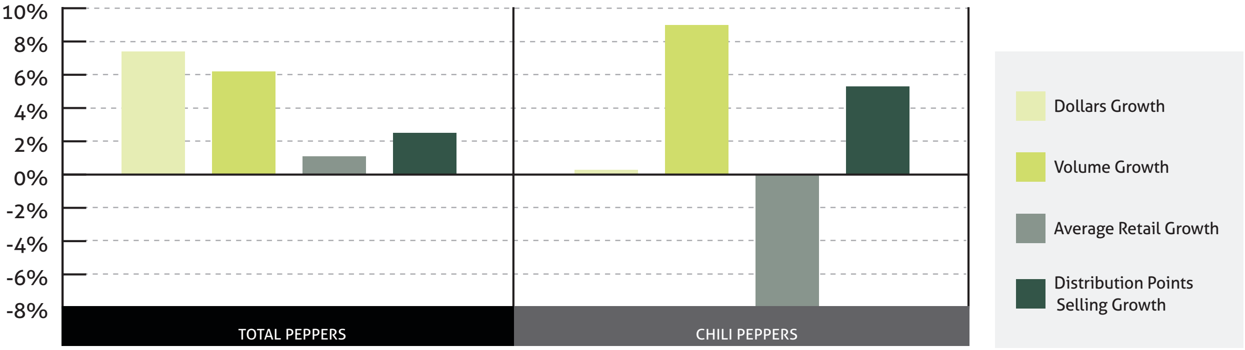
Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14



Average Basket Size Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14



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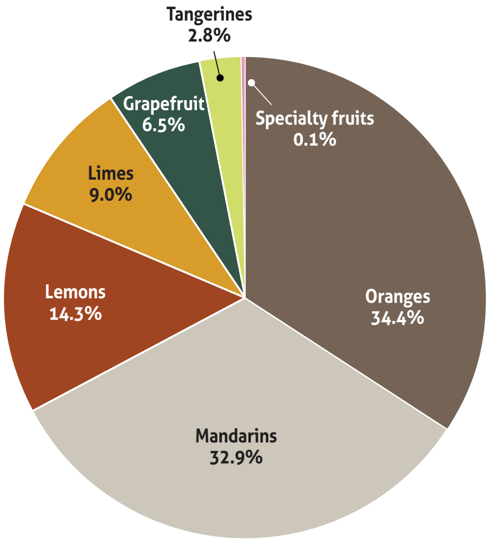
For more information and promotional support, contact New Mexico Department of Agriculture at www.newmexicotradition.com

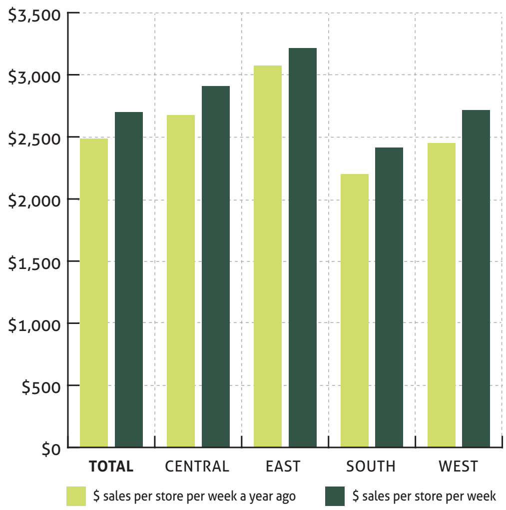
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14



Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14



Average Basket Size Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14

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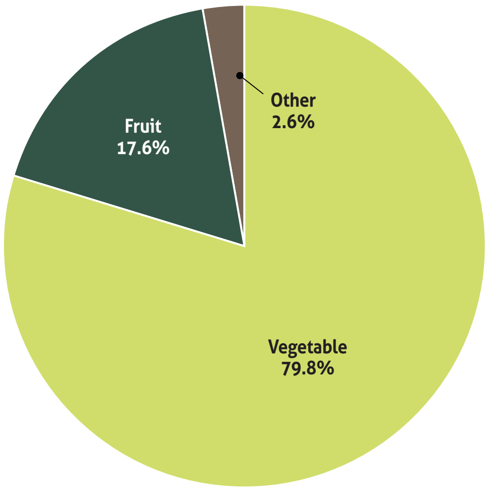
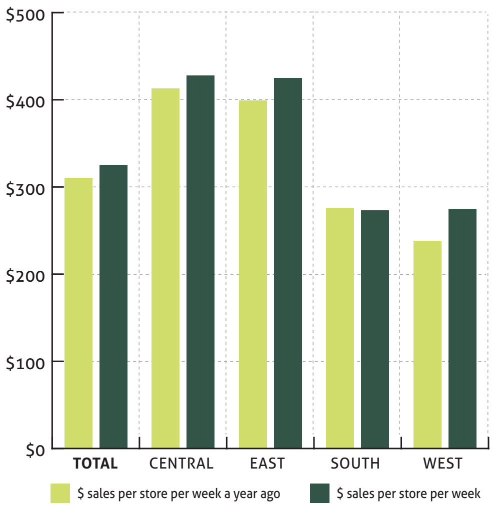
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14

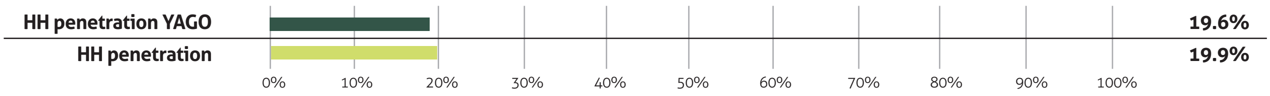


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14



Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14

Perishables Group Keeping Your Business Fresh | FreshFacts Shopper Insights powered by Spire

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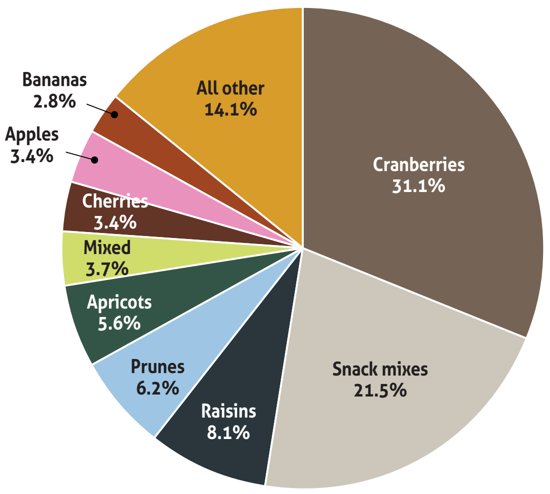
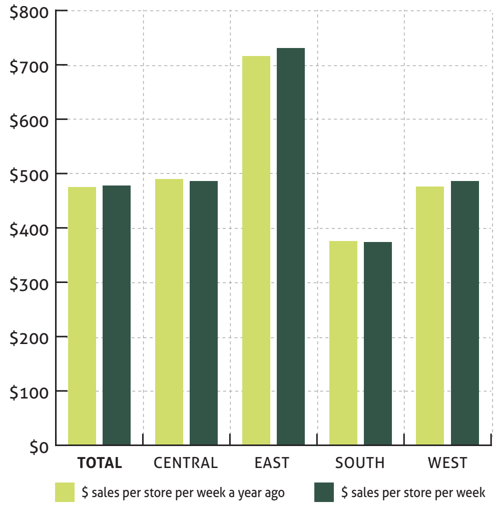
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14



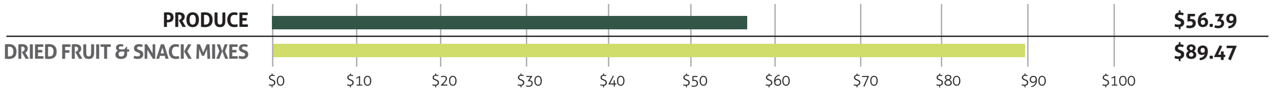
Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14



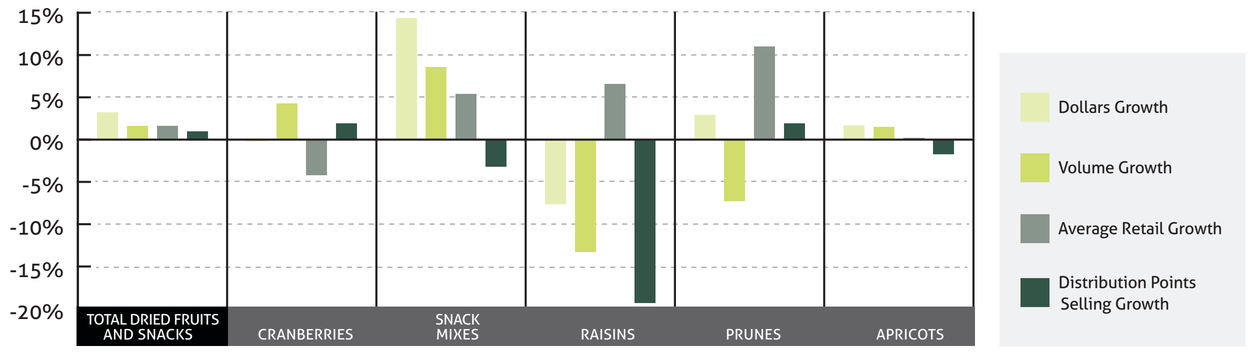
Average Basket Size

Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



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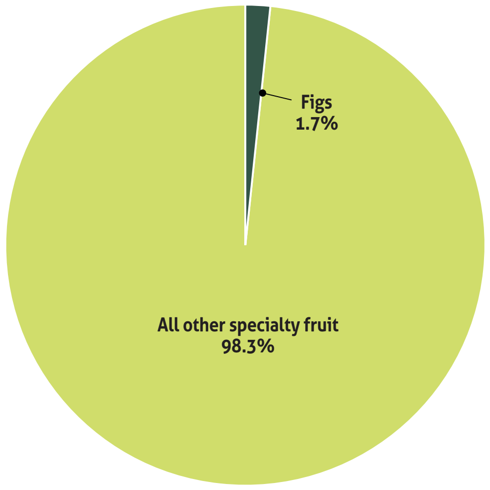
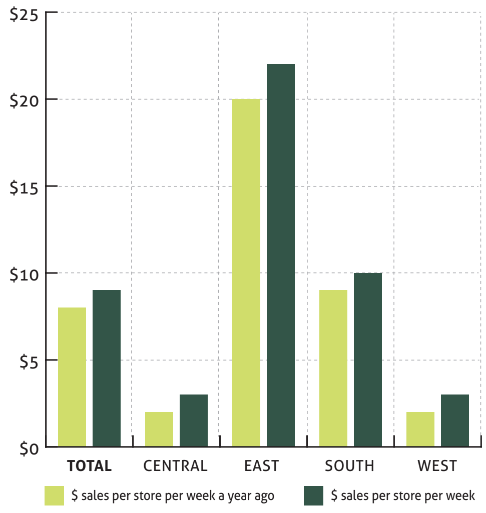
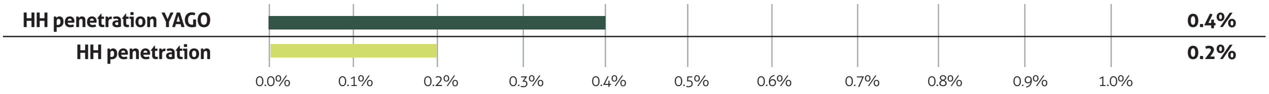


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

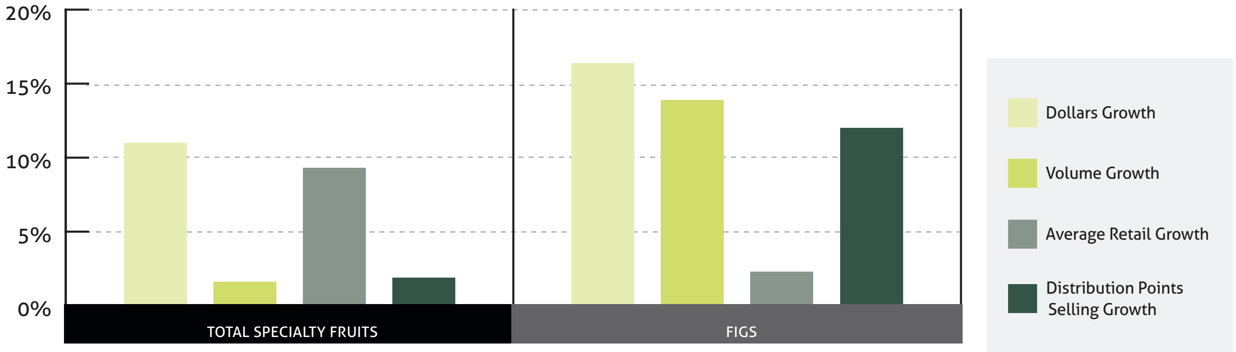


Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



Perishables Group FreshFacts Shopper Insights

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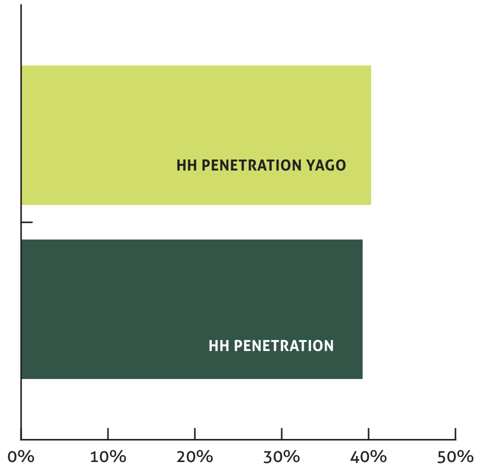
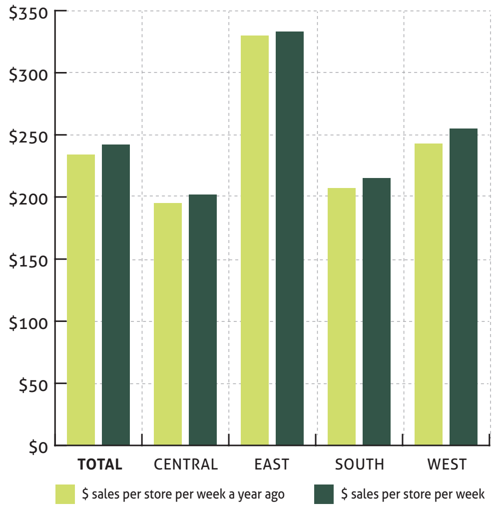
Household Penetration

Total U.S. for the 52 weeks ended 2/22/14

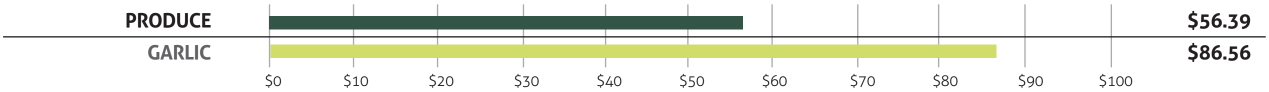


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

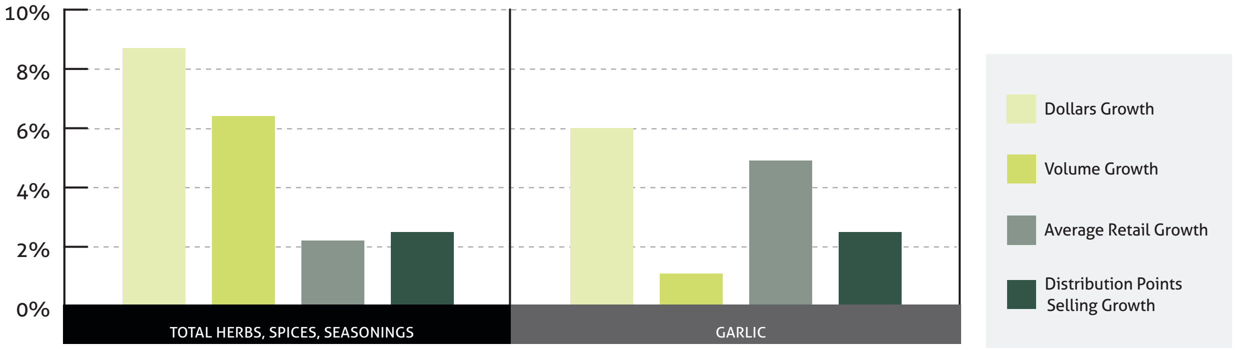


Average Basket Size Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



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Share of Category Dollars

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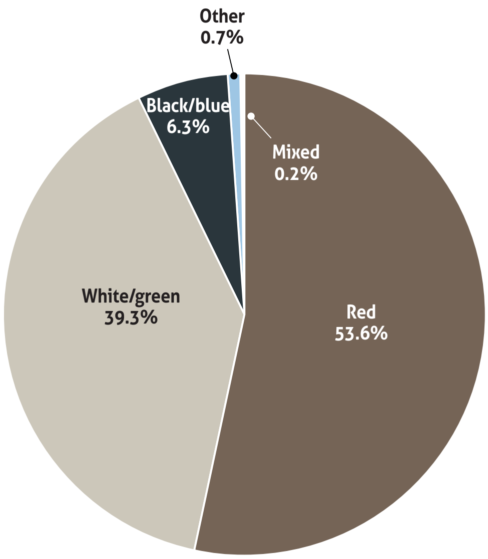

Average Weekly Dollar Sales by Region

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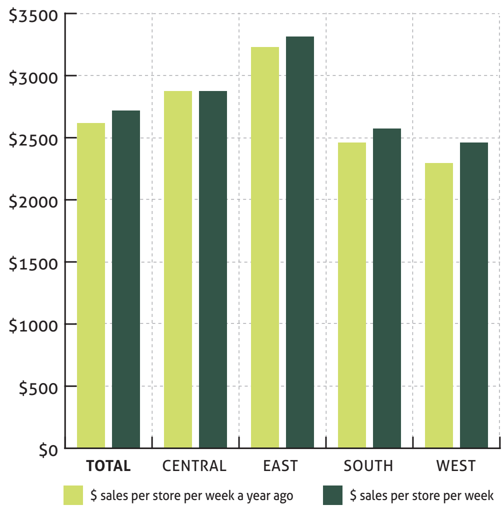
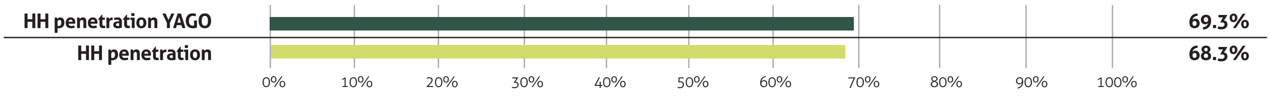


Household Penetration Total U.S. for the 52 weeks ended 2/22/14



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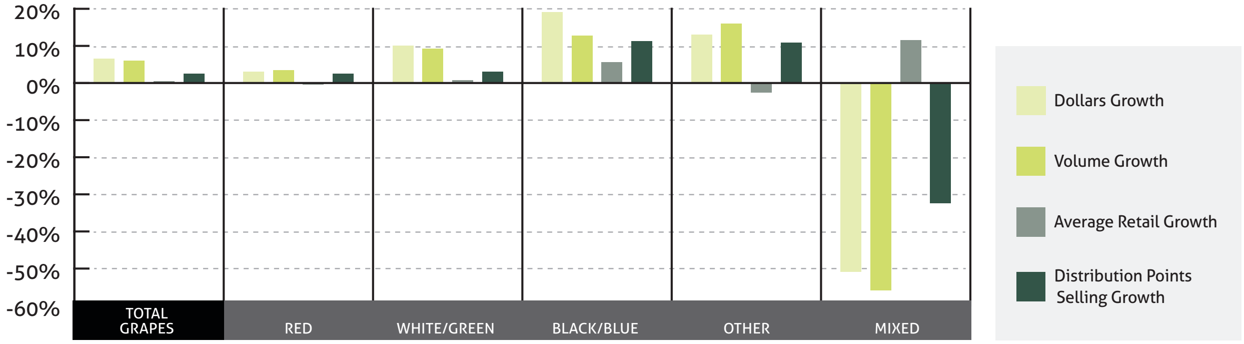

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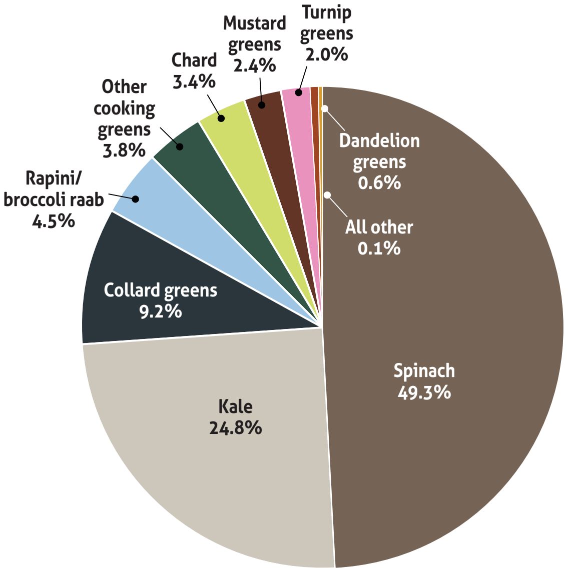

Average Weekly Dollar Sales by Region

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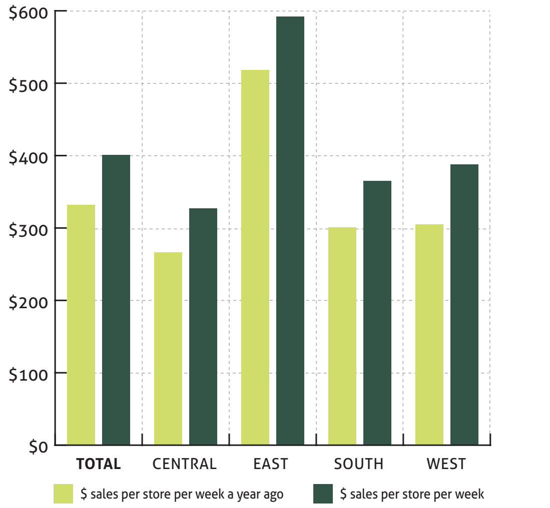
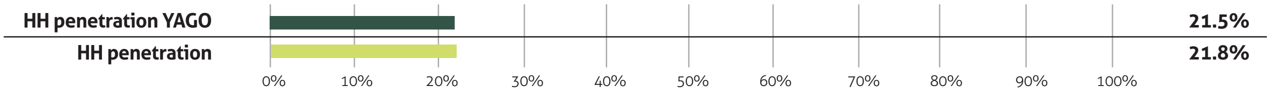


Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

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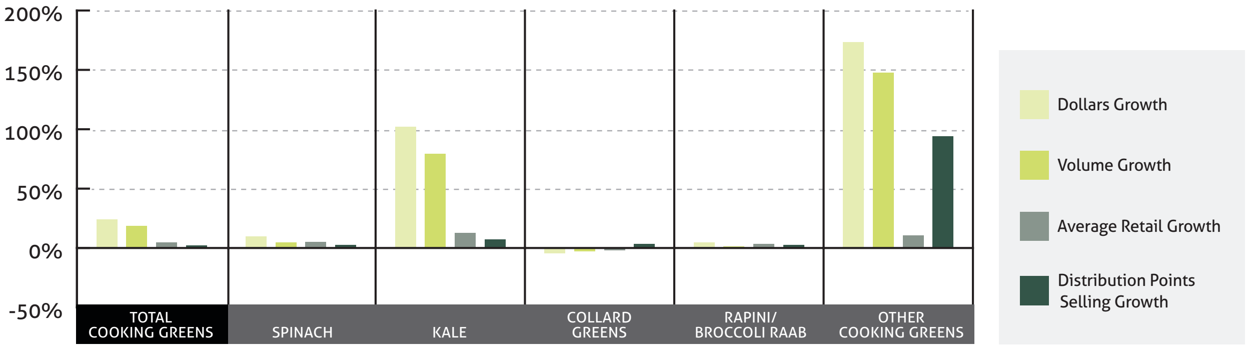

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Share of Category Dollars

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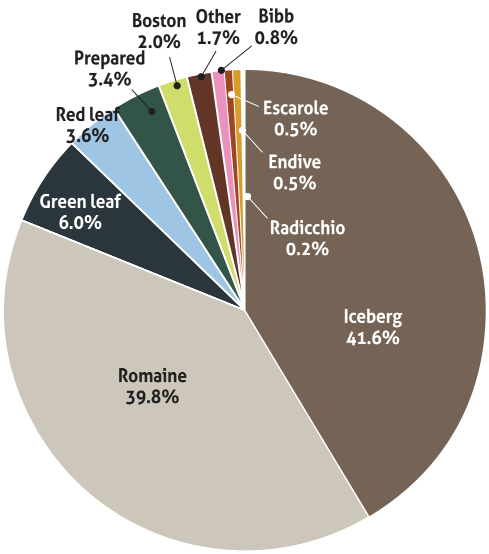

Average Weekly Dollar Sales by Region

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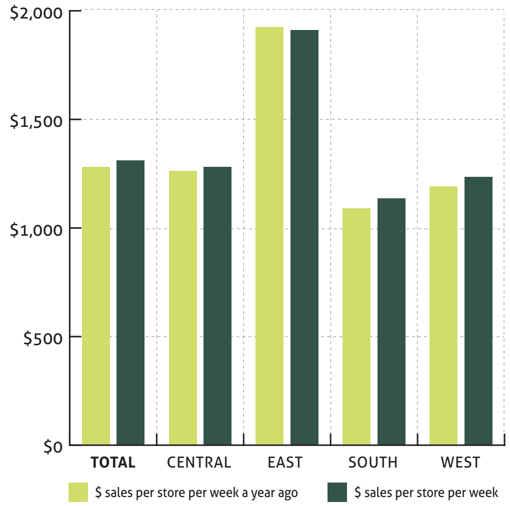
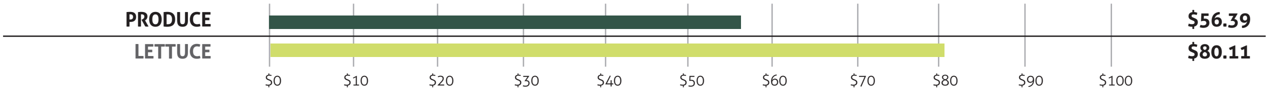
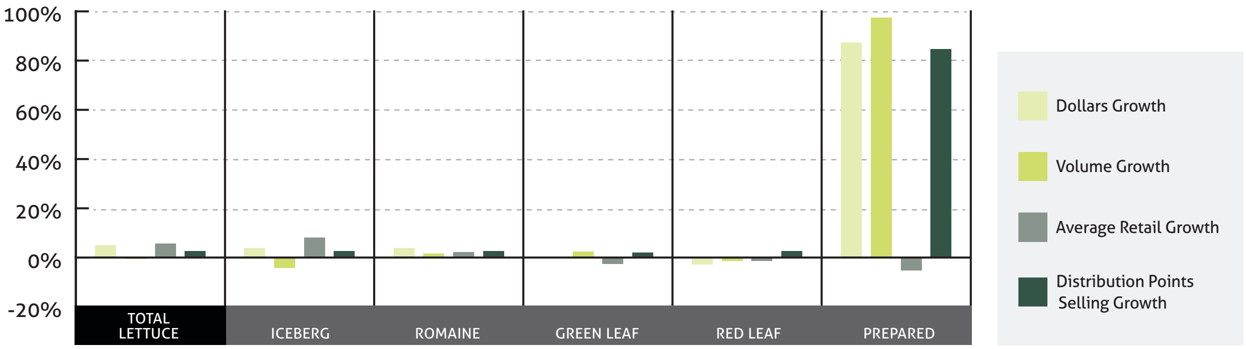


Average Basket Size Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



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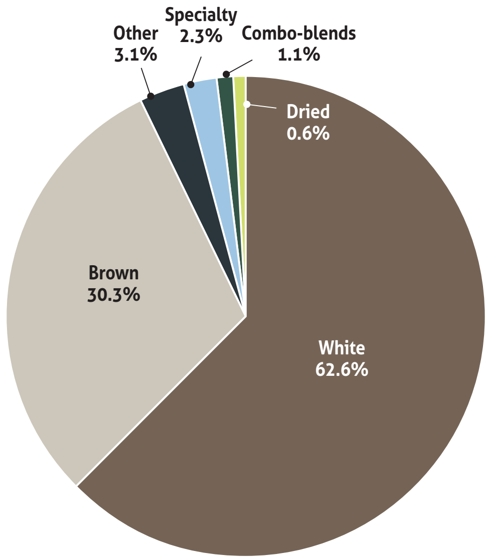
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14



Average Weekly Dollar Sales by Region

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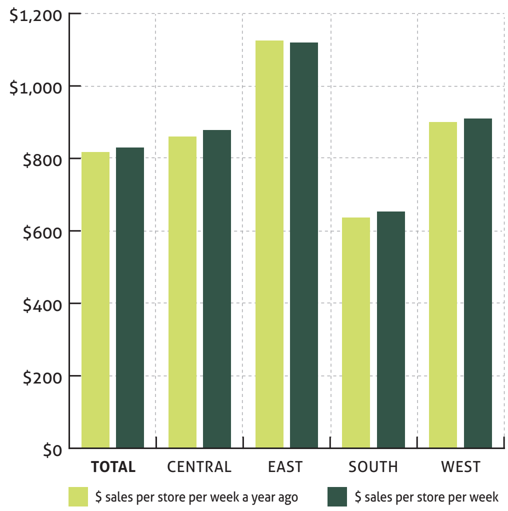
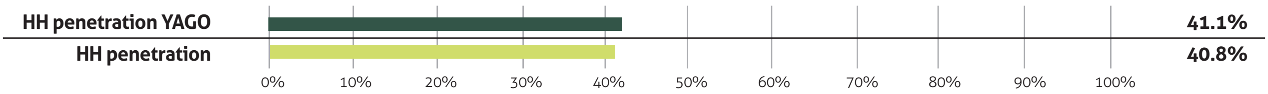


Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

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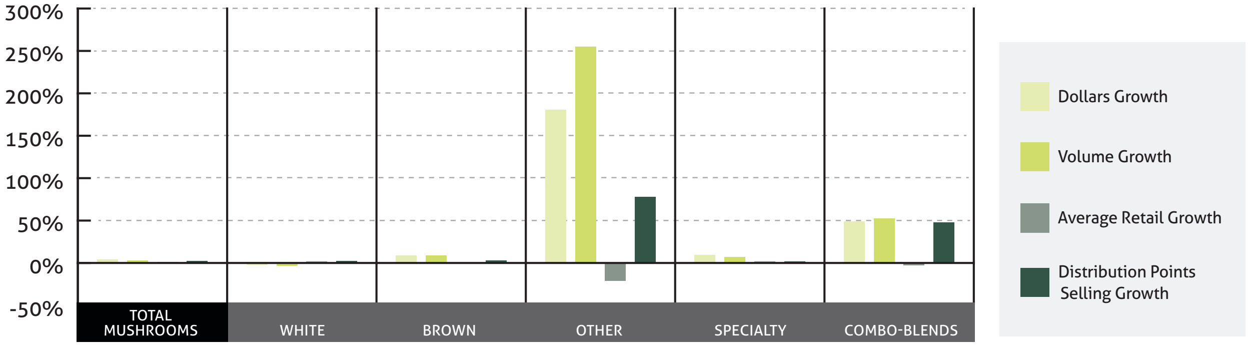

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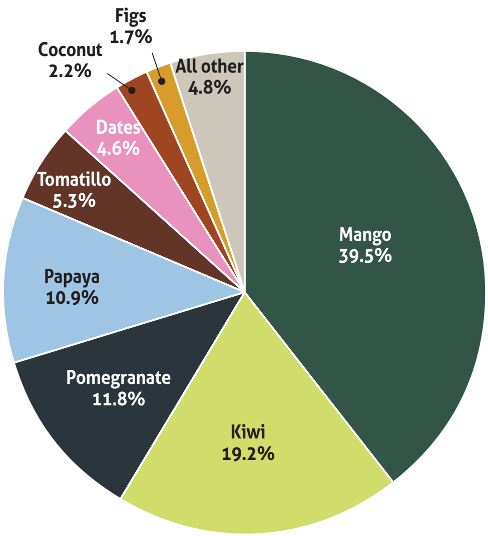
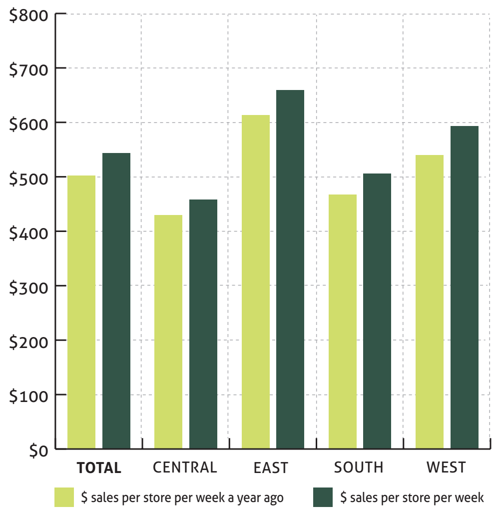
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14

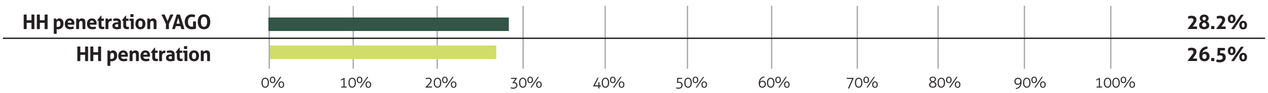


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14



Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

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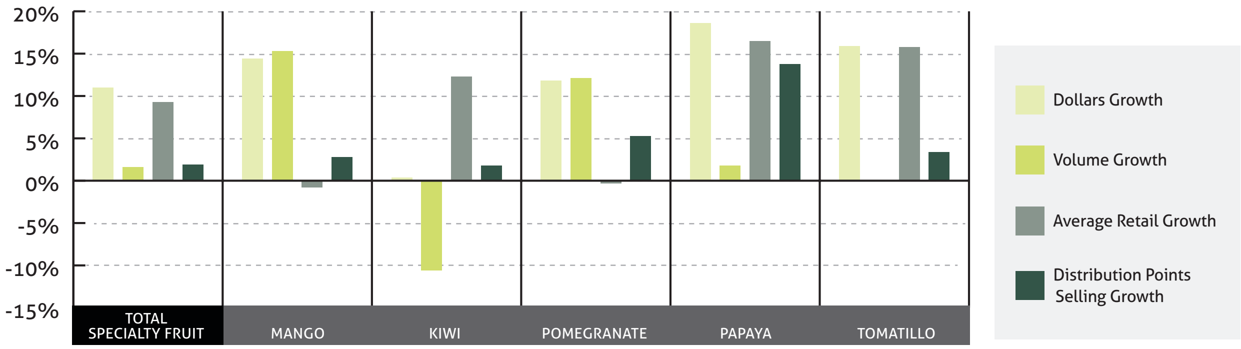

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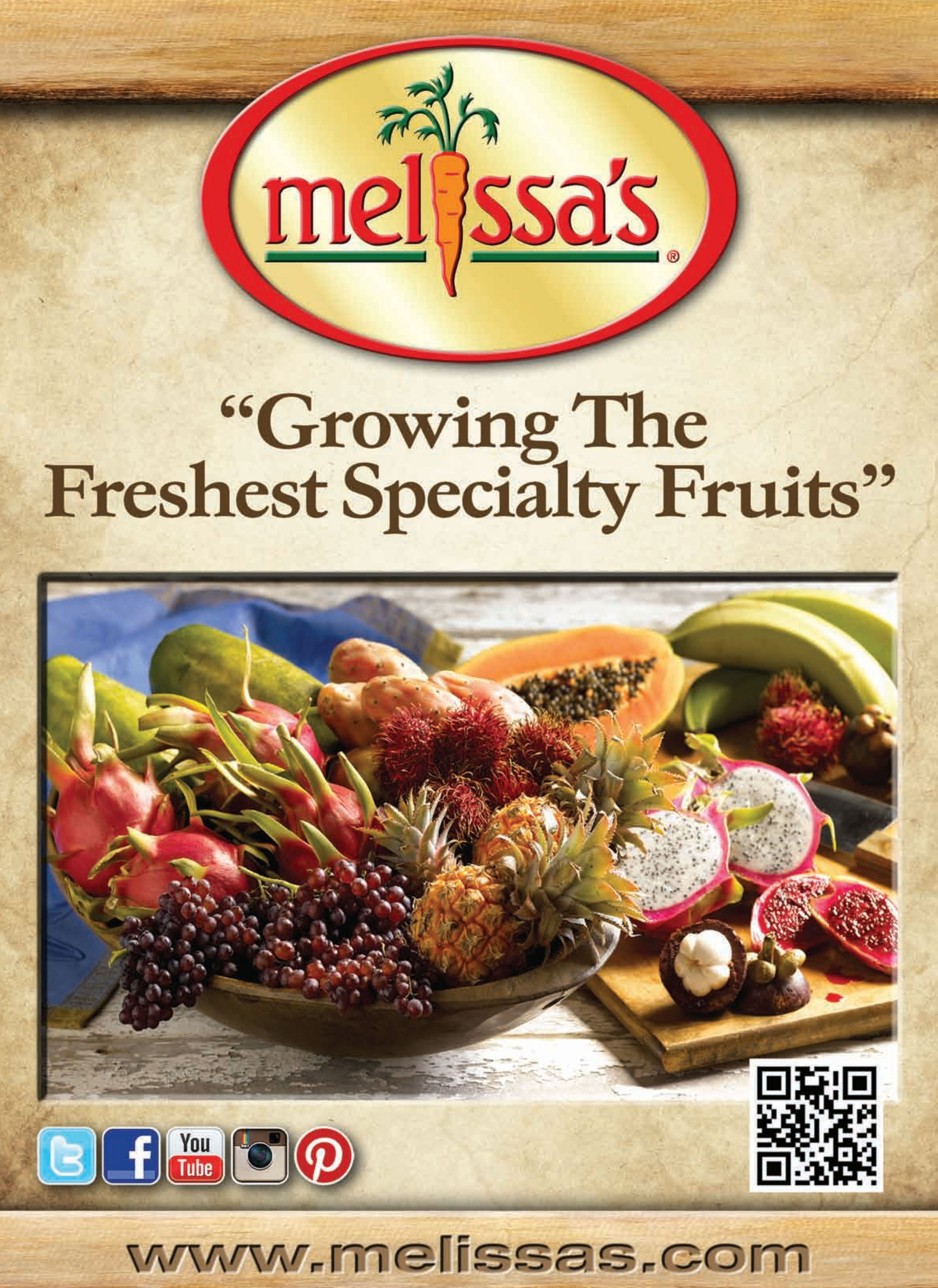
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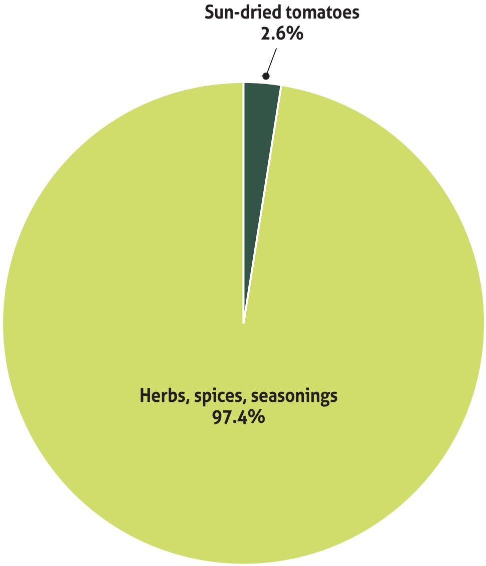
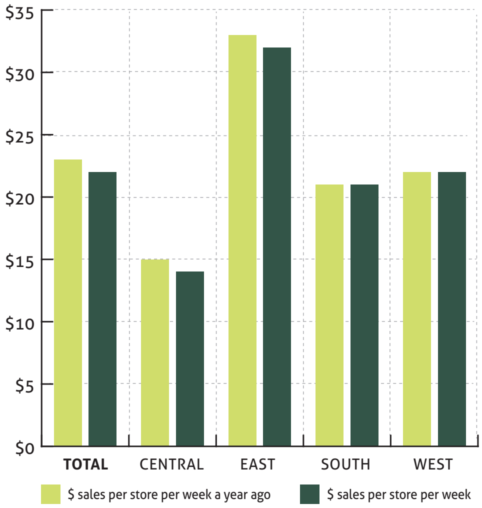
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14

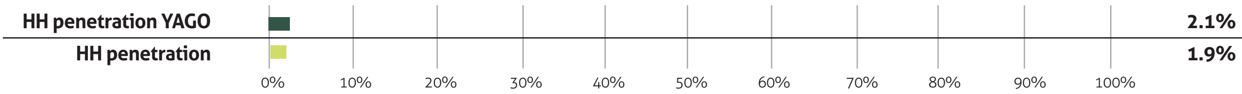


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

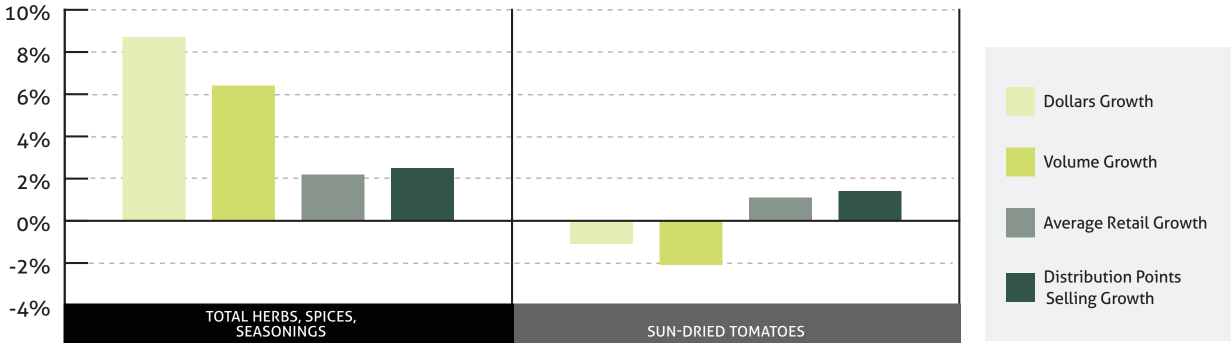


Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



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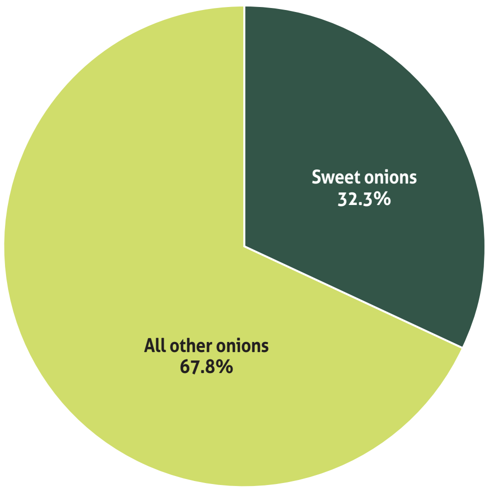
*National retail sales data 12/31/12

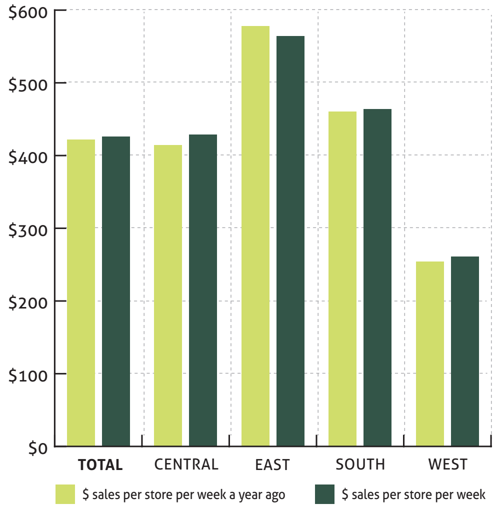
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14

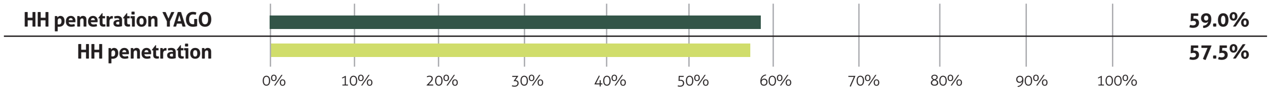


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14



Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14

Perishables Group Keeping Your Business Fresh FreshFacts Shopper Insights Spire

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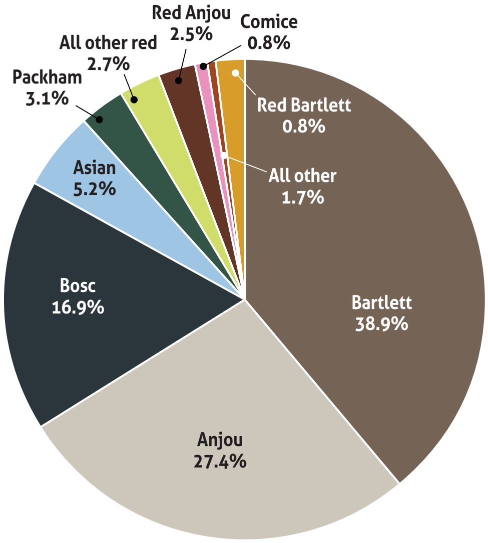
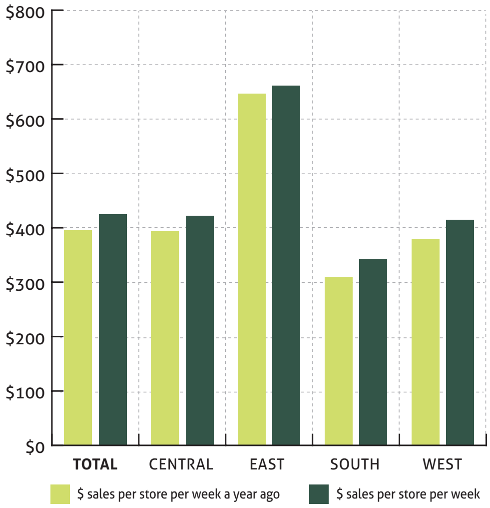
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14

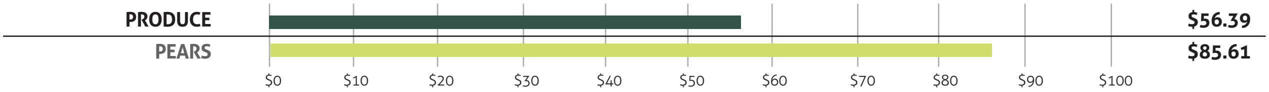


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

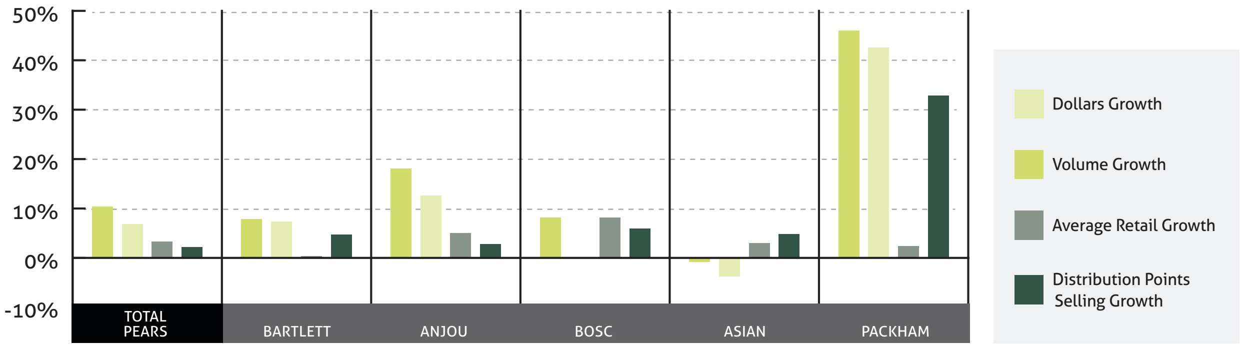


Average Basket Size Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

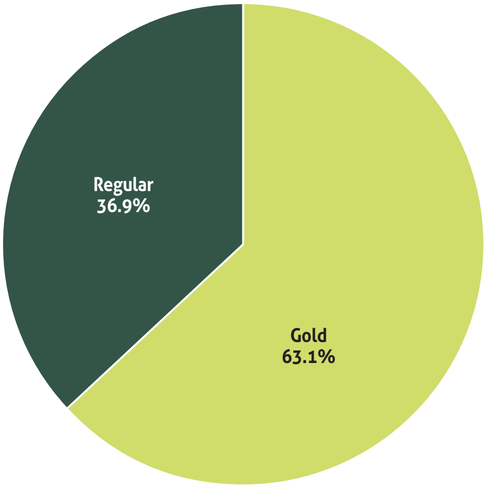
Total U.S. for the 52 weeks ended 2/22/14



Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.

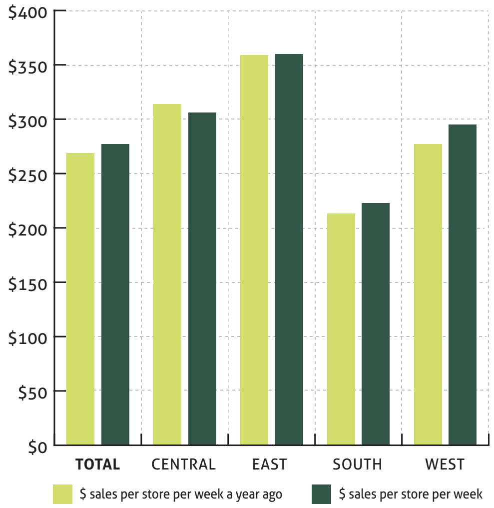
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14

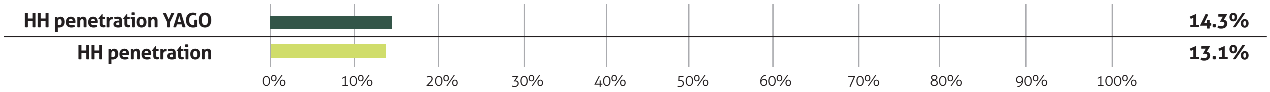


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

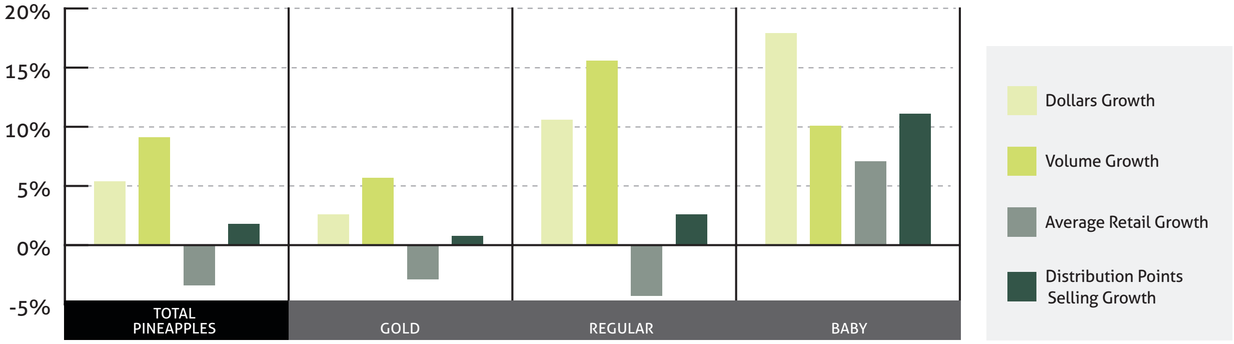


Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



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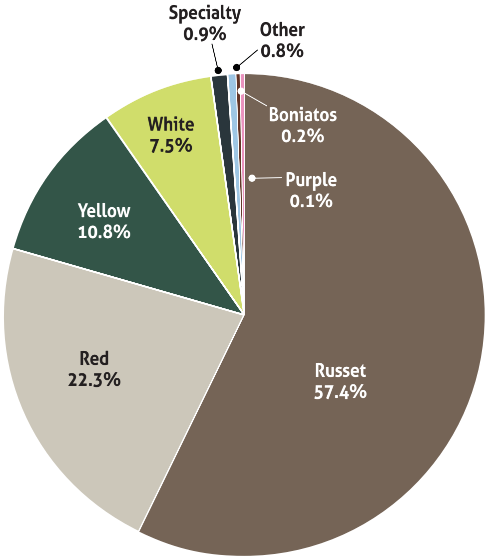
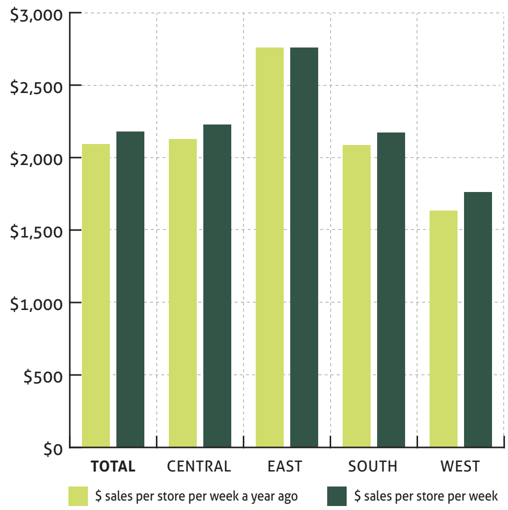
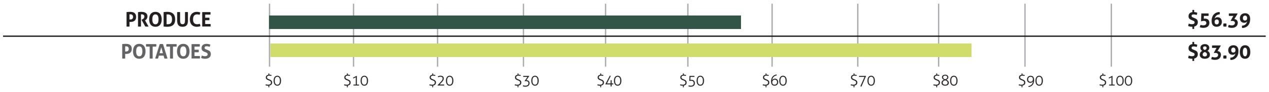
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14



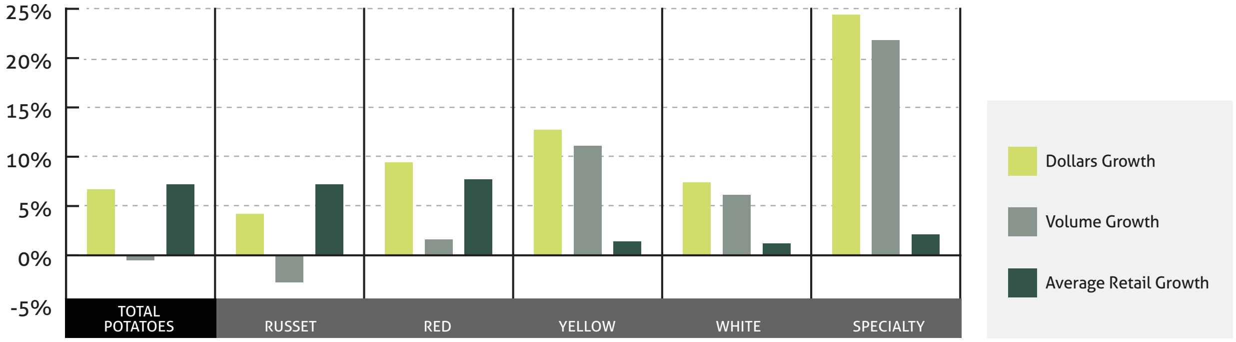
Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14



Average Basket Size Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14



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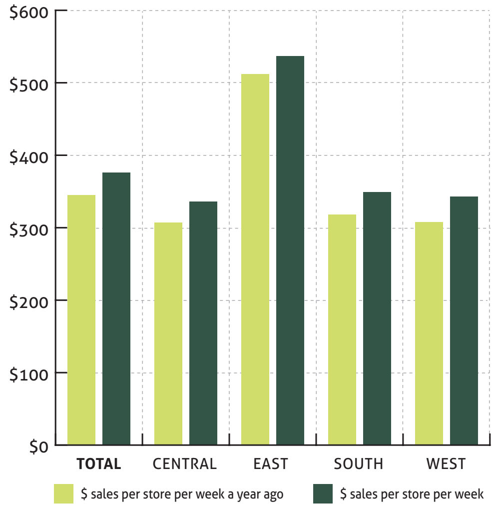
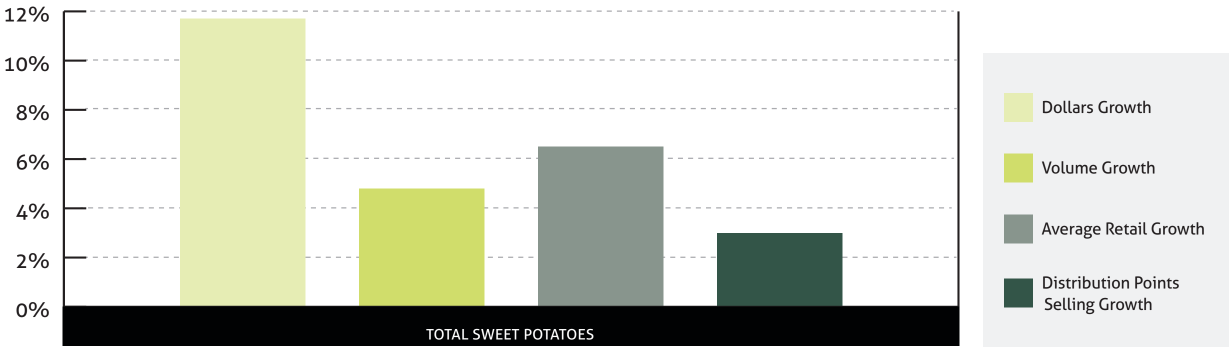
Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14



Average Basket Size Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14



Perishables Group® Keeping Your Business Fresh® FreshFacts® Shopper Insights powered by Spire — Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.

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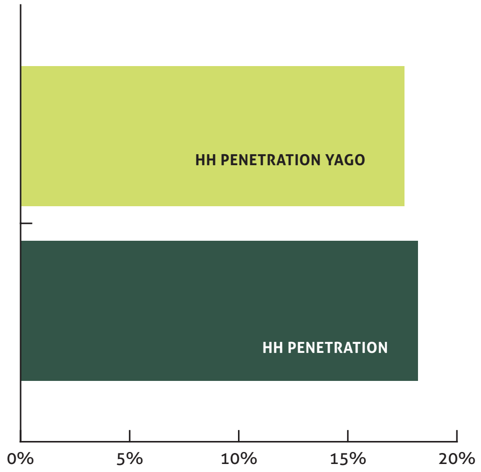
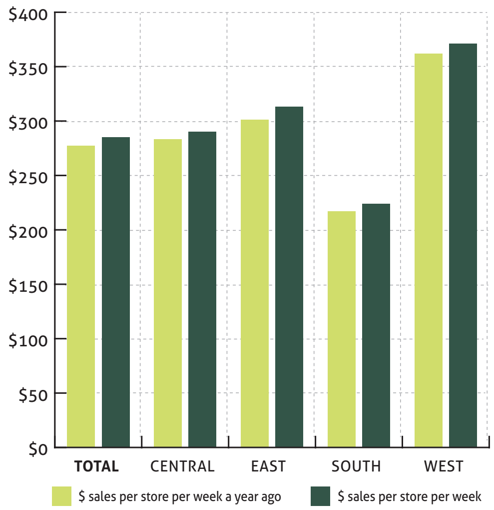
Household Penetration

Total U.S. for the 52 weeks ended 2/22/14



Average Weekly Dollar Sales by Region

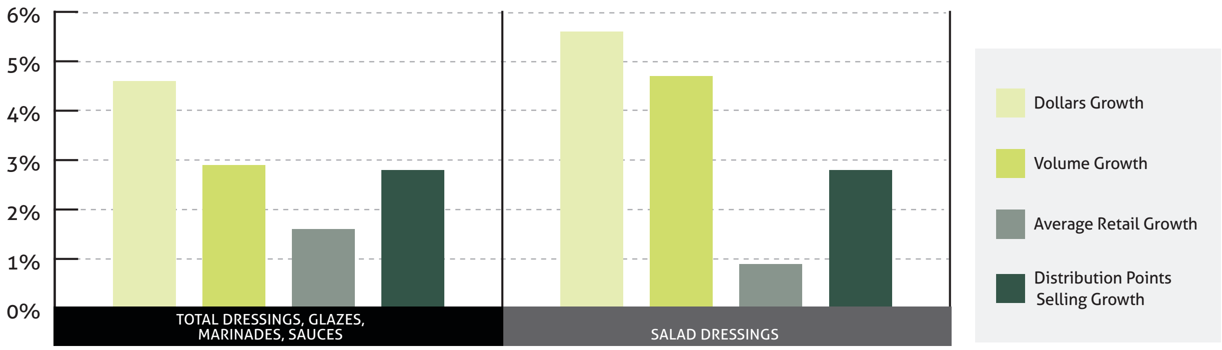
Total U.S. for the 52 weeks ended 2/22/14



Average Basket Size Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.

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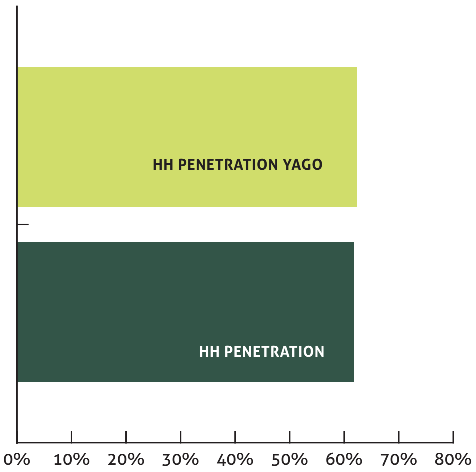
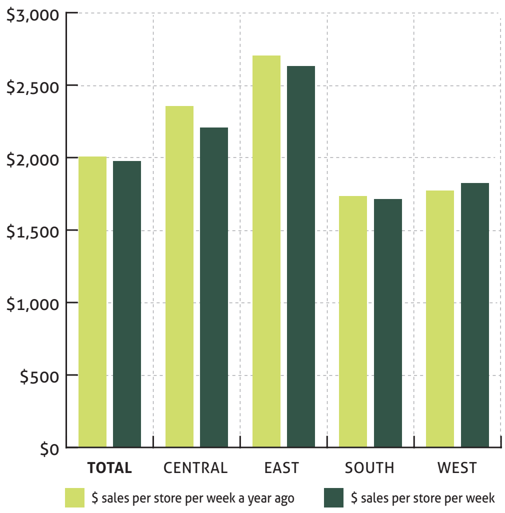
Household Penetration

Total U.S. for the 52 weeks ended 2/22/14



Average Weekly Dollar Sales by Region

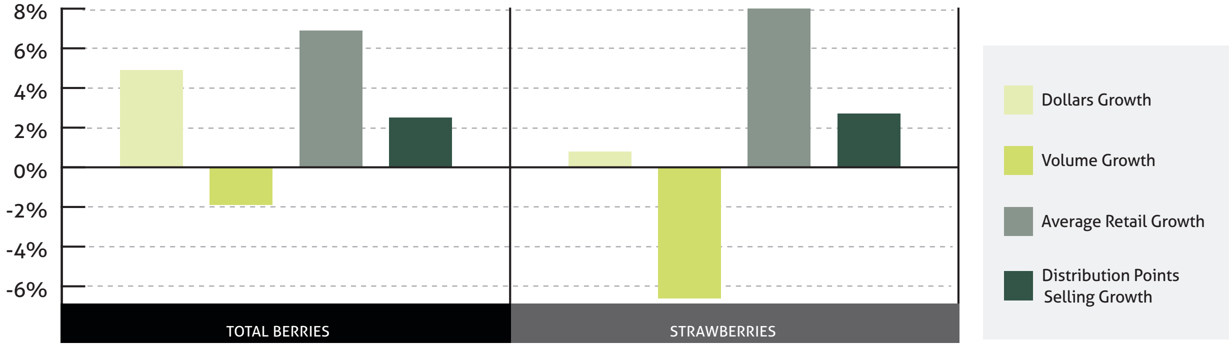
Total U.S. for the 52 weeks ended 2/22/14



Average Basket Size Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



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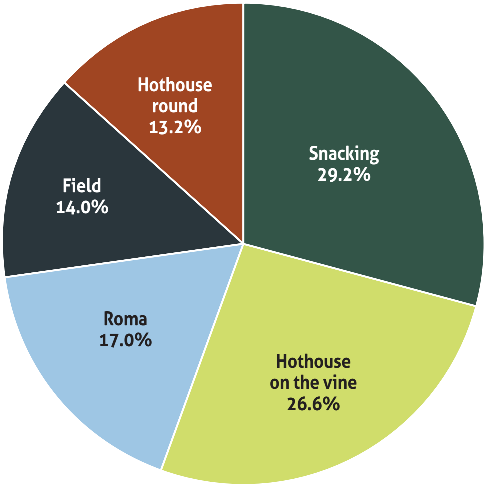
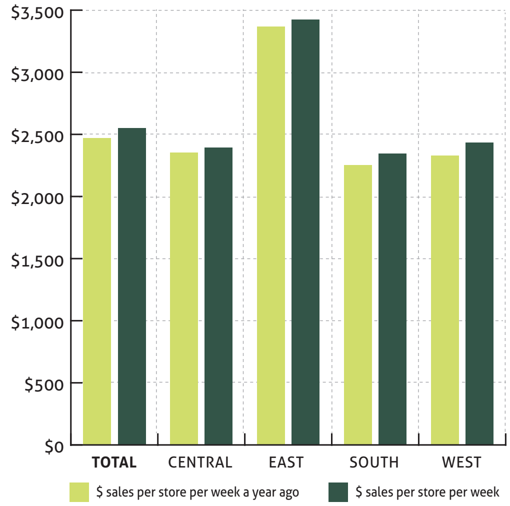
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14



Average Weekly Dollar Sales by Region

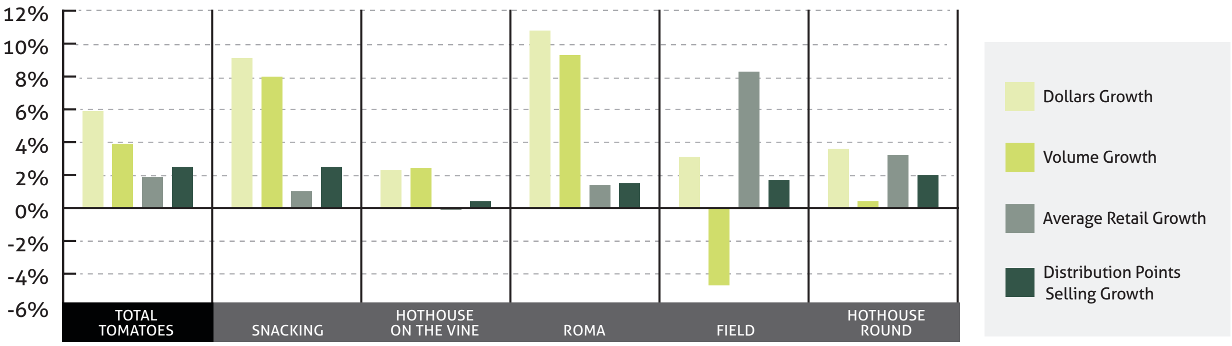
Total U.S. for the 52 weeks ended 2/22/14



Average Basket Size Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



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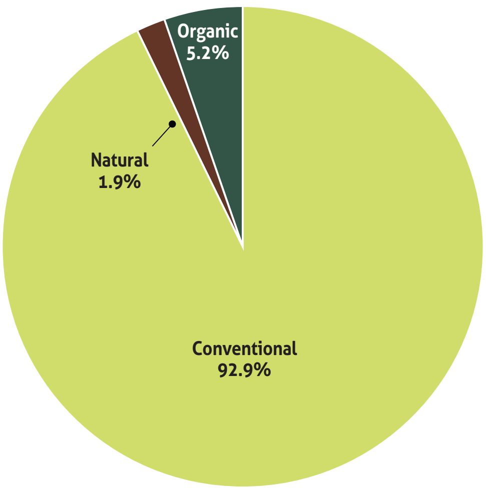
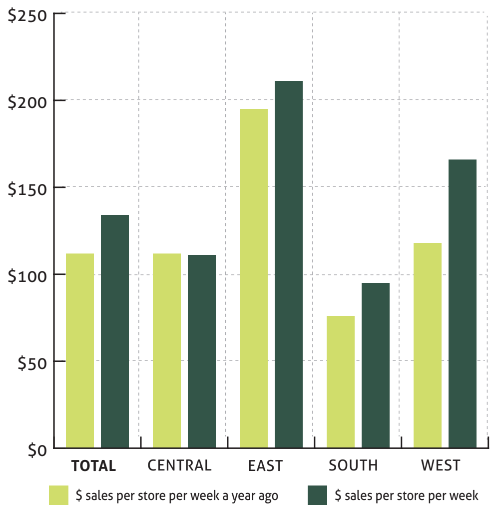
Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14

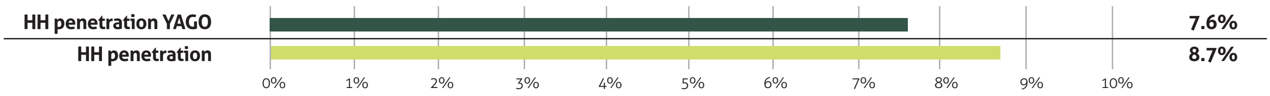


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

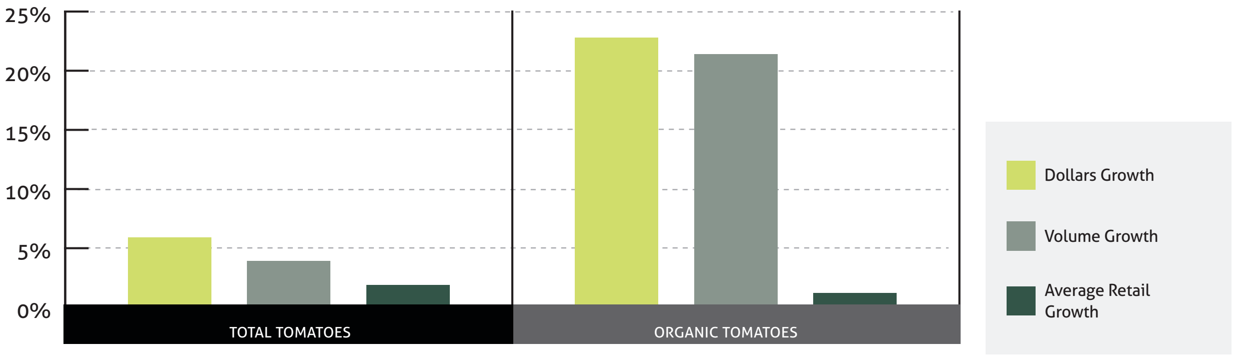


Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



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Share of Category Dollars

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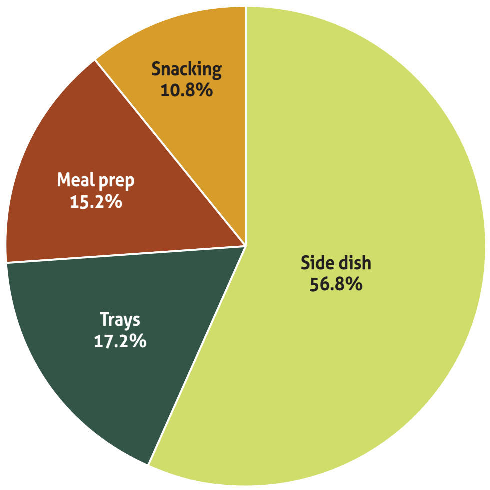
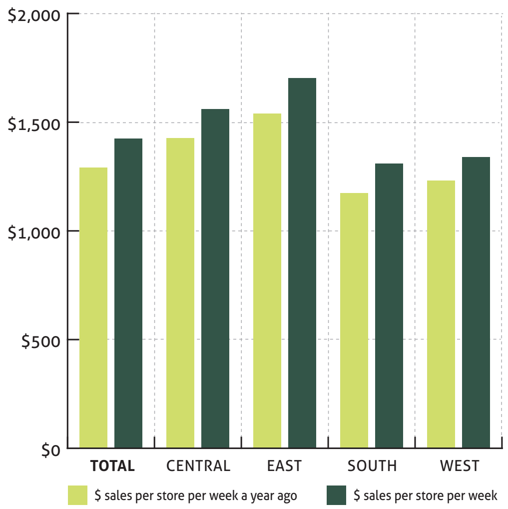
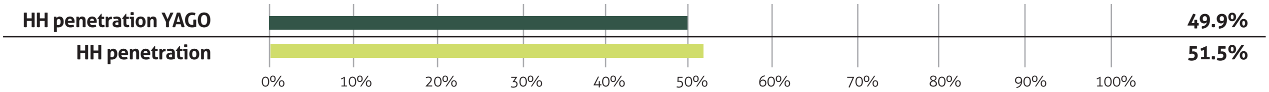


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

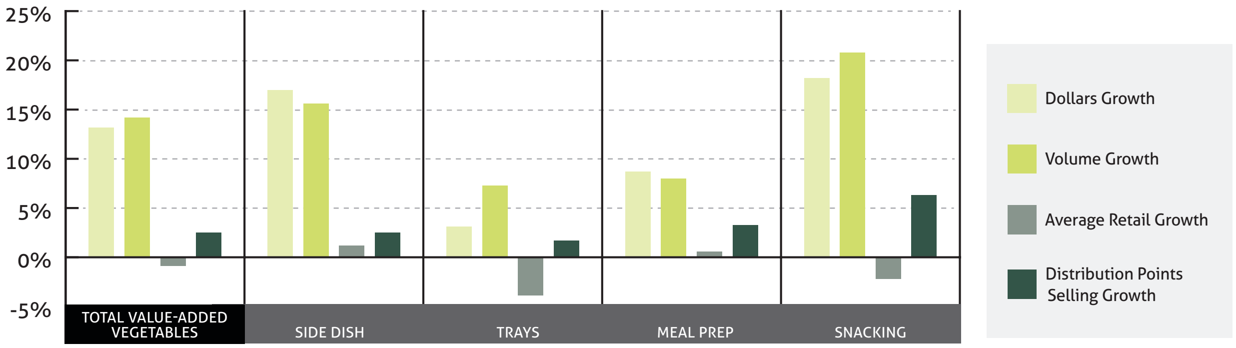


Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14



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Household Penetration

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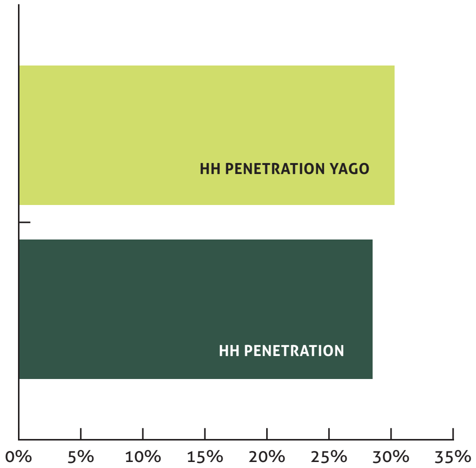
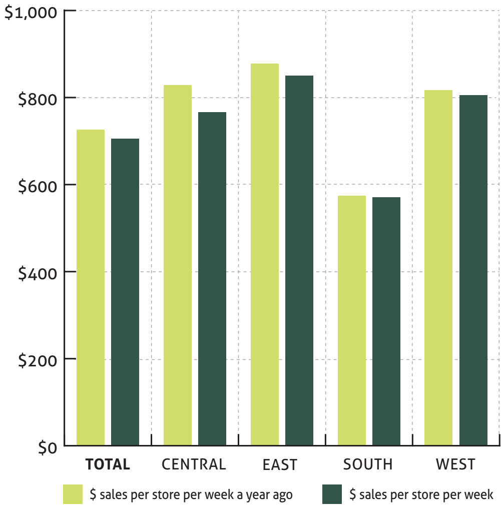


Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14



Average Basket Size Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14

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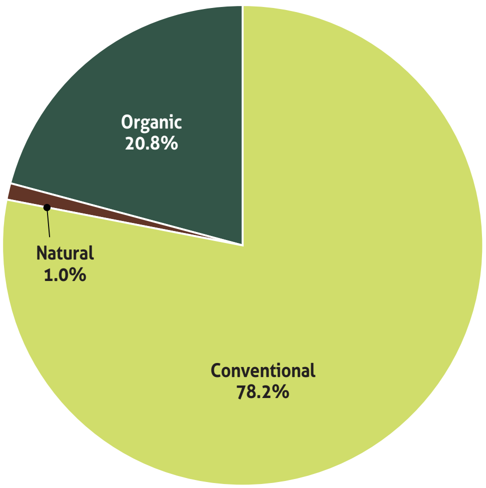
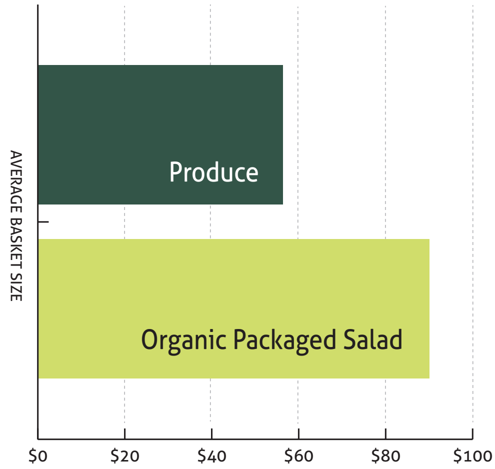
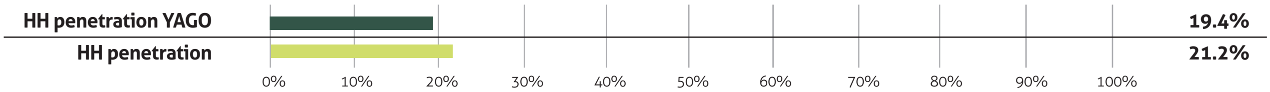
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14



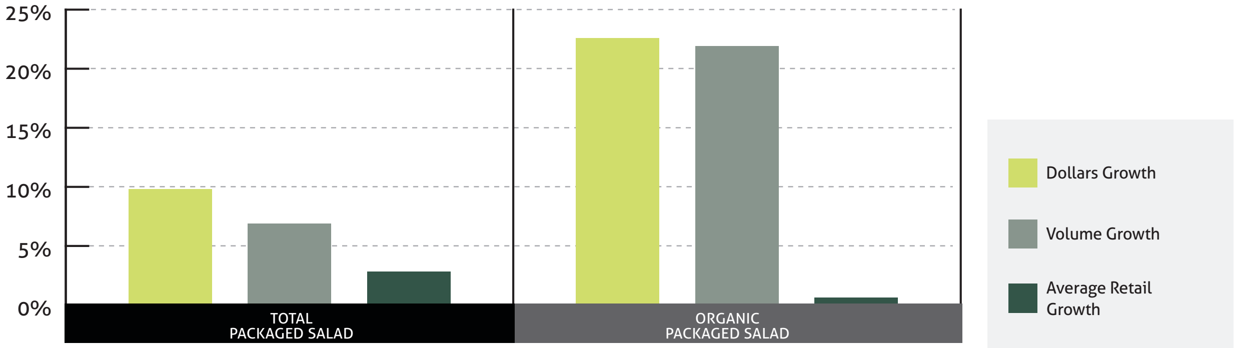
Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14



Household Penetration Total U.S. for the 52 weeks ended 2/22/14



Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14



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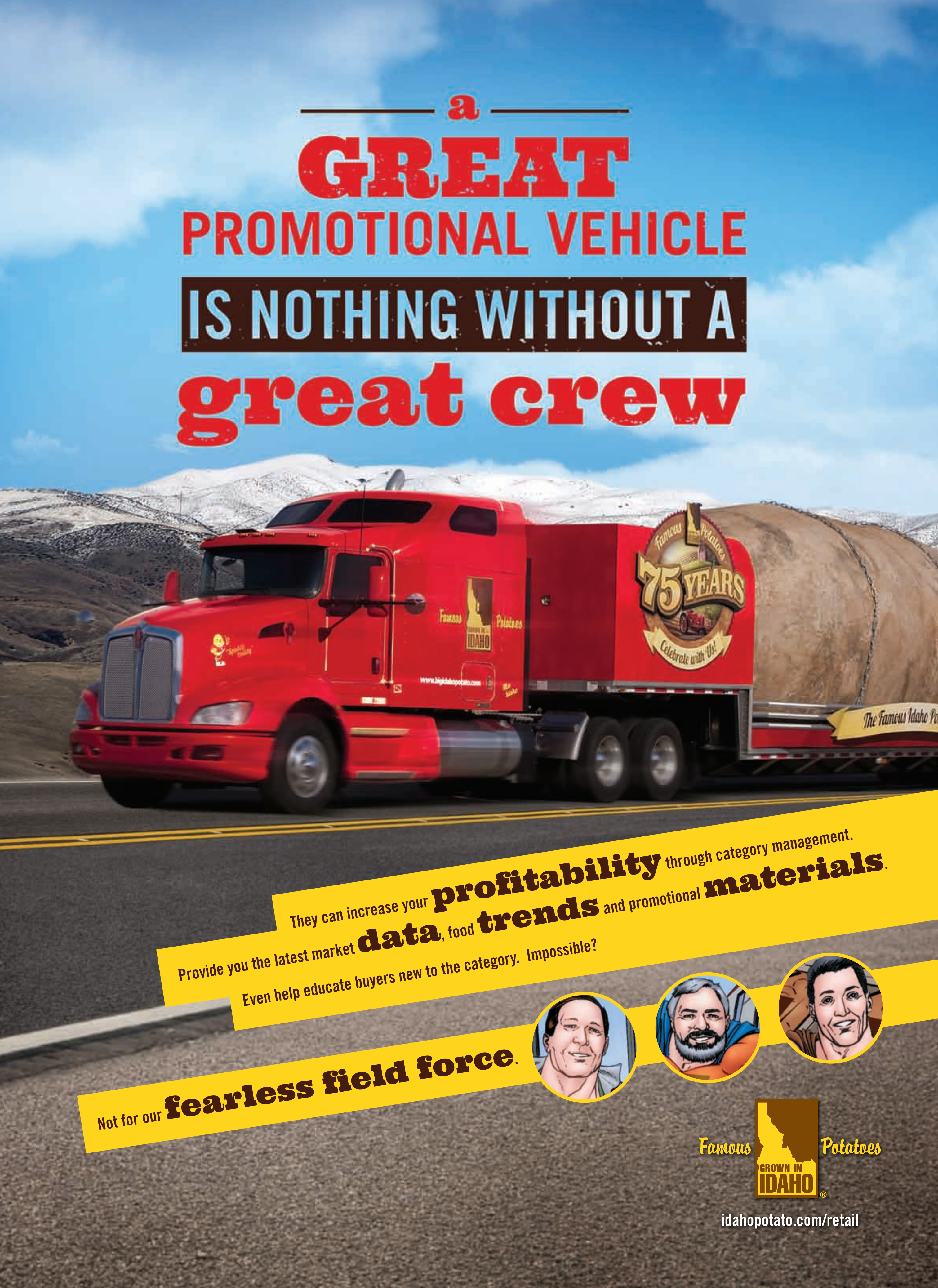

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