



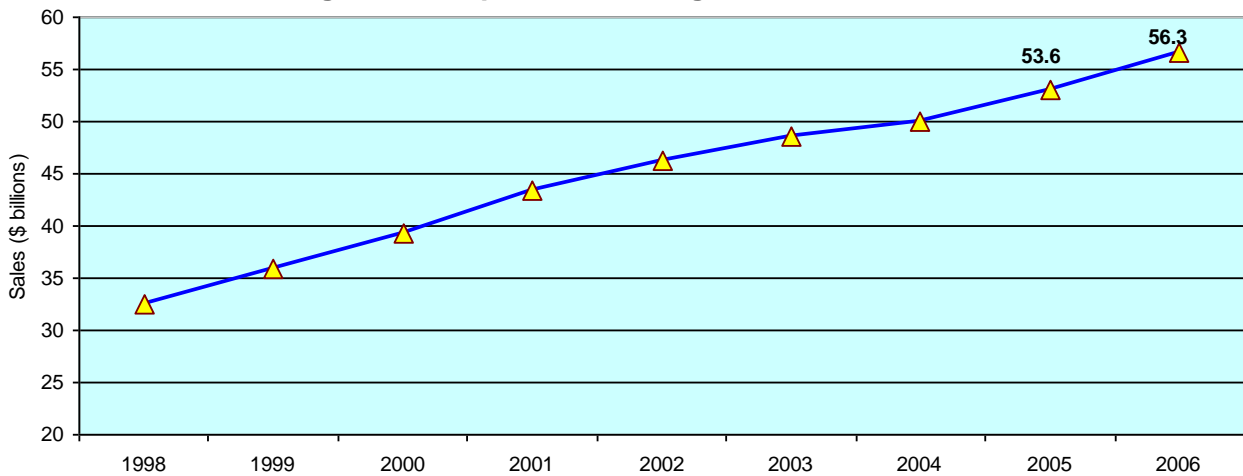
Retail Fresh Produce Industry Sales

This PMA member service was compiled by the Produce Marketing Association
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Notes: *This Fact Sheet provides the most current information available at the time of publication.
Sources of all information are given at the end of this Fact Sheet under "References."*

TREND IN RETAIL PRODUCE SALES

Fig. 1 - Retail produce sales grows 6% in 2006



PRODUCE SHARE OF RETAIL SALES

Fig. 2 - Produce share of retail sales climbs to 12.4% in 2005



SALES OF MAJOR FRUITS

Fig. 3 – Retail Sales of Fresh Fruits

| Fruit | Sales 2005 (\$ millions) | Sales 2006 (\$ millions) | % of Total Produce Sales 2005 | % of Total Produce Sales 2006 |
|--------------------------|-----------------------------|-----------------------------|----------------------------------|-------------------------------------|
| Apples | 3795 | 4260 | 7.1% | 7.6% |
| Apricots | 45 | 41 | 0.1% | 0.1% |
| Avocados | 964 | 1081 | 1.8% | 1.9% |
| Bananas | 3434 | 3628 | 6.5% | 6.5% |
| Berries | 3797 | 4226 | 7.2% | 7.5% |
| Cherries | 778 | 899 | 1.5% | 1.6% |
| Coconuts | 16 | 16 | 0.0% | 0.0% |
| Grapefruit | 352 | 392 | 0.7% | 0.7% |
| Grapes | 3802 | 3911 | 7.2% | 7.0% |
| Kiwis | 100 | 110 | 0.2% | 0.2% |
| Lemons | 519 | 590 | 1.0% | 1.1% |
| Limes | 322 | 385 | 0.6% | 0.7% |
| Mangoes | 223 | 280 | 0.4% | 0.5% |
| Melons | 2719 | 2947 | 5.1% | 5.3% |
| Nectarines | 533 | 522 | 1.0% | 0.9% |
| Oranges | 1549 | 1677 | 2.9% | 3.0% |
| Other Fruit | 426 | 443 | 0.8% | 0.8% |
| Papaya | 86 | 94 | 0.2% | 0.2% |
| Peaches | 784 | 836 | 1.5% | 1.5% |
| Pears | 641 | 710 | 1.2% | 1.3% |
| Pineapple | 568 | 629 | 1.1% | 1.1% |
| Plums | 409 | 405 | 0.8% | 0.7% |
| Pomegranate | 52 | 60 | 0.1% | 0.1% |
| Specialty Oranges | 35 | 37 | 0.1% | 0.1% |
| Tangelos | 92 | 90 | 0.2% | 0.2% |
| Tangerines/ Mandarins | 558 | 602 | 1.1% | 1.1% |

SALES OF MAJOR VEGETABLES

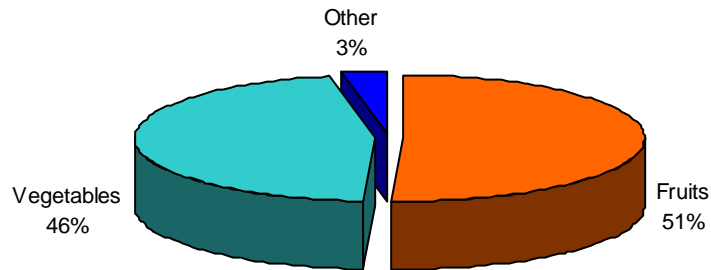
Fig. 4 – Retail Sales of Fresh Vegetables

| Vegetable | Sales 2005 (\$ millions) | Sales 2006 (\$ millions) | % of Total Produce Sales 2005 | % of Total Produce Sales 2006 |
|-------------------|-----------------------------|-----------------------------|-------------------------------------|-------------------------------------|
| Artichokes | 131 | 123 | .24% | 0.22% |
| Asparagus | 717 | 775 | .13 | 1.4 |
| Beans | 463 | 492 | 0.9 | 0.9 |
| Broccoli | 1070 | 1091 | 2.0 | 1.9 |
| Beets/Beet Greens | 30 | 29 | 0.1 | 0.1 |
| Cabbage | 401 | 409 | 0.8 | 0.7 |
| Carrots | 1764 | 1804 | 3.3 | 3.2 |
| Cauliflower | 395 | 391 | 0.7 | 0.7 |
| Celery | 874 | 920 | 1.6 | 1.6 |
| Corn | 677 | 672 | 1.3 | 1.2 |
| Cucumbers | 974 | 1013 | 1.8 | 1.8 |
| Eggplant | 137 | 134 | 0.3 | 0.2 |
| Garlic | 200 | 215 | 0.4 | 0.4 |
| Greens | 165 | 169 | 0.3 | 0.3 |
| Leeks | 38 | 38 | 0.1 | 0.1 |
| Lettuce | 2194 | 2269 | 4.1 | 4.0 |
| Mushrooms | 1233 | 1288 | 2.3 | 2.3 |
| Onions | 2336 | 2396 | 4.4 | 4.3 |
| Other Vegetables | 757 | 770 | 1.3 | 1.4 |
| Parsnip | 19 | 21 | 0.1 | 0.1 |
| Peas | 152 | 187 | 0.3 | 0.3 |
| Peppers | 1789 | 1842 | 3.0 | 3.0 |
| Potatoes | 3201 | 3568 | 6.0 | 6.3 |
| Pumpkins | 111 | 122 | 0.2 | 0.2 |
| Radishes | 126 | 131 | 0.2 | 0.2 |
| Roots | 80 | 83 | 0.2 | 0.2 |
| Spinach | 217 | 181 | 0.4 | 0.3 |
| Sprouts | 75 | 82 | 0.1 | 0.2 |
| Squash | 770 | 782 | 1.4 | 1.4 |
| Sweet Potato/Yams | 297 | 311 | 0.6 | 0.6 |
| Tomatoes | 4393 | 5034 | 8.7 | 8.9 |

MARKET SHARE

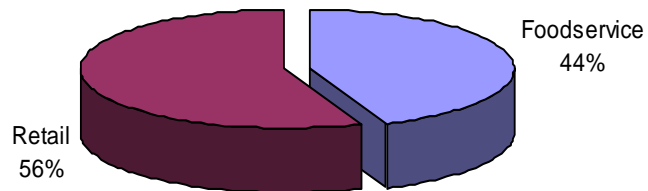
Fruits and Vegetables

Fig. 5 - Fruits captured 51% of retail produce sales in 2006



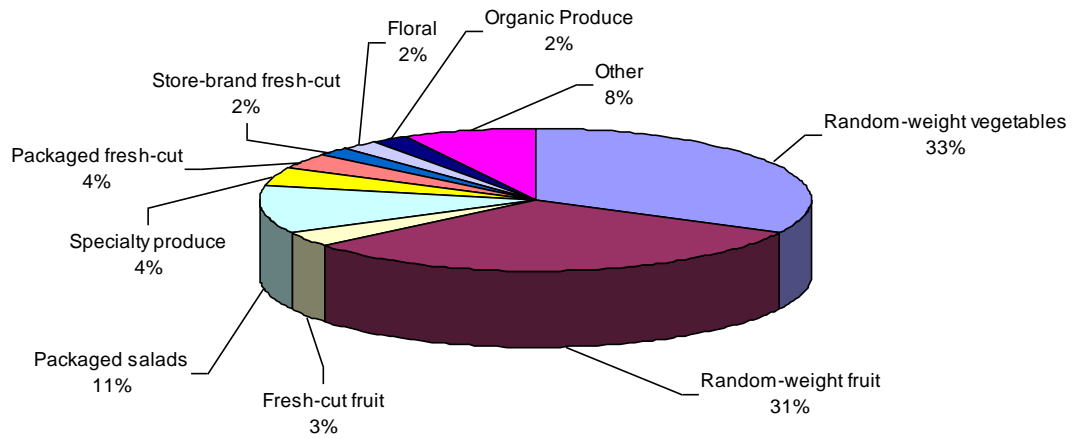
Retail and Foodservice

Fig. 6 - Retail sales estimated to be 56% of total fresh produce sales in 2005



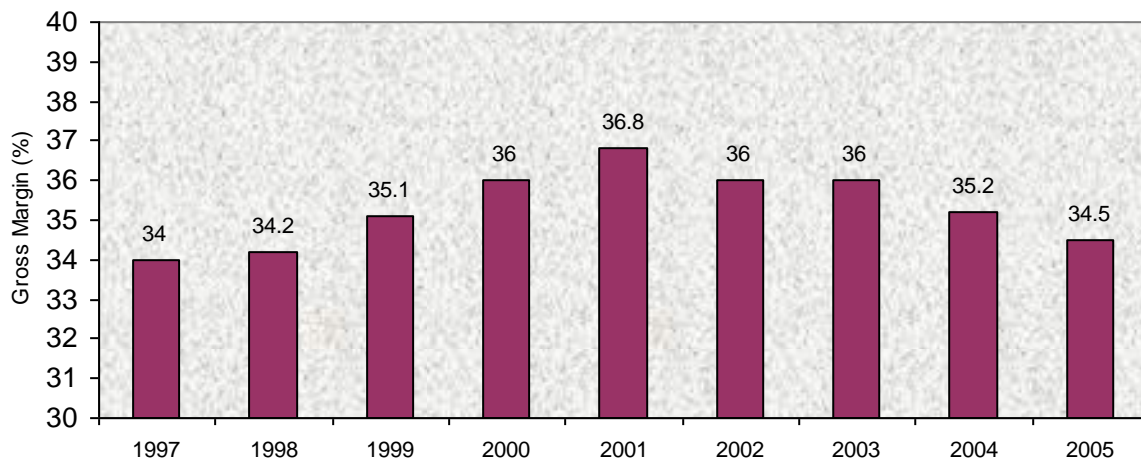
PRODUCE SALES BY LINE ITEM

Fig. 7 - Share of produce department sales by line item (2006)



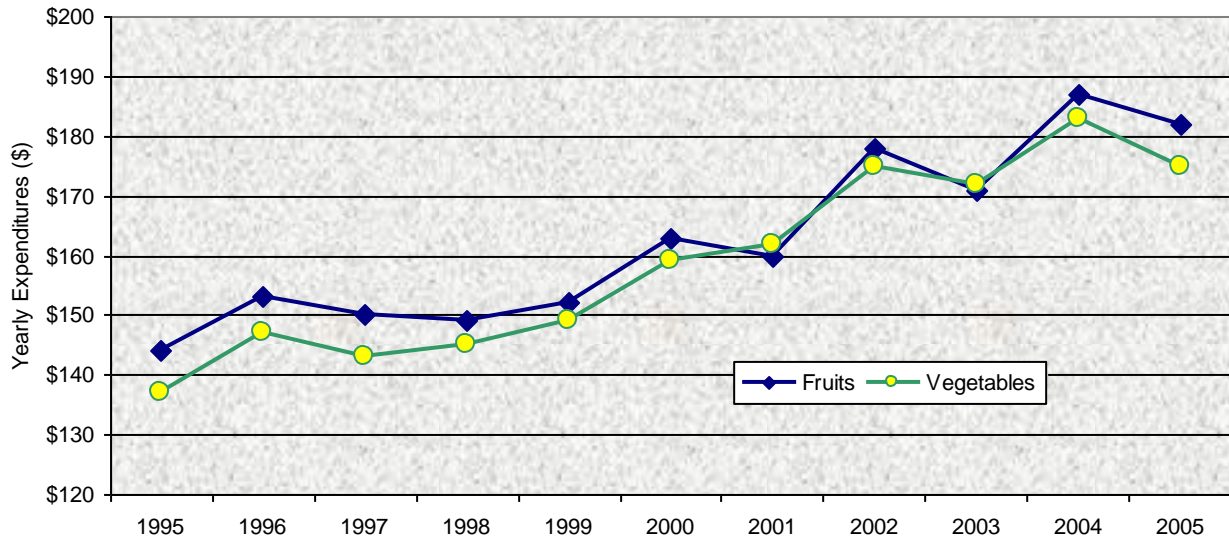
GROSS MARGINS

Fig. 8 - Fresh produce gross margin drops to 34.5% in 2005



CONSUMER EXPENDITURES FOR PRODUCE

Fig. 9 - Consumers spend \$357 on fresh produce in 2005



PRODUCE PENETRATION RATE

Fig. 10 – Percent of Households Purchasing Fresh Fruits in 2005

| Fruit | % of Households Purchasing Item | # Times Purchased/Year |
|--------------|---------------------------------|------------------------|
| Bananas | 84% | 15 |
| Grapes | 68 | 6 |
| Apples | 67 | 6 |
| Cantaloupes | 48 | 4 |
| Oranges | 44 | 4 |
| Peaches | 42 | 3 |
| Watermelons | 38 | 3 |
| Nectarines | 30 | 3 |
| Strawberries | 61 | 5 |
| Cherries | 23 | 2 |
| Grapefruits | 19 | 3 |
| Avocados | 23 | 5 |
| Limes | 17 | 3 |

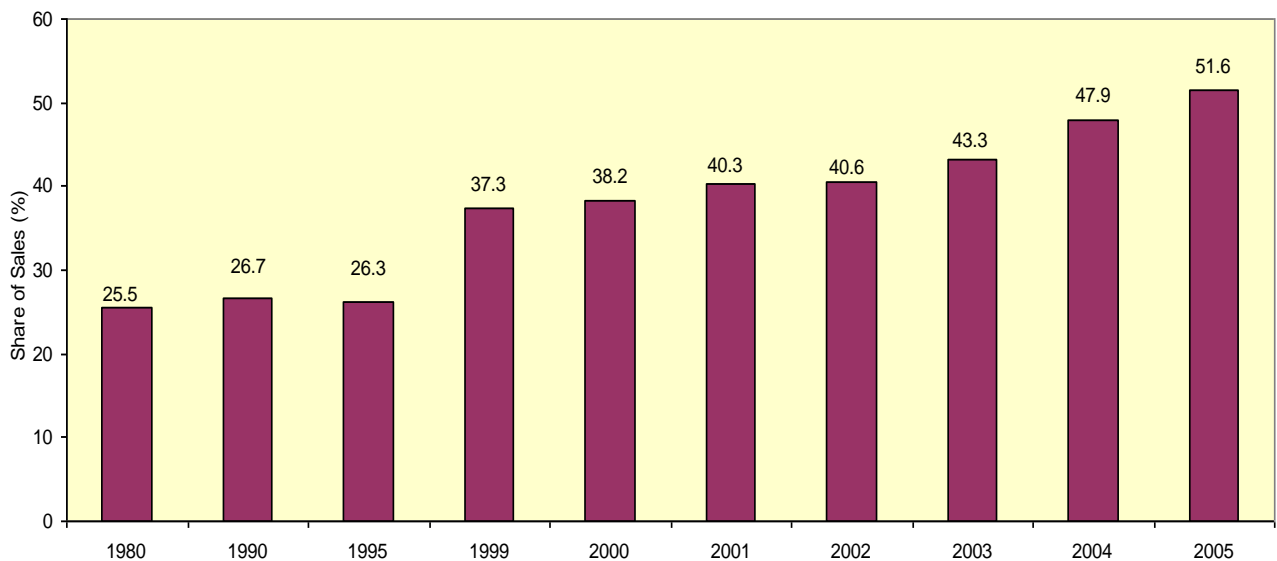
Fig. 11 – Percent of Households Purchasing Fresh Vegetables in 2005

| Vegetable | % of Households Purchasing Item | # Times Purchased/Year |
|-----------|---------------------------------|------------------------|
| Onions | 71% | 6 |
| Tomatoes | 70 | 8 |
| Potatoes | 74 | 5 |
| Peppers | 58 | 6 |
| Lettuce | 47 | 5 |
| Cucumbers | 50 | 5 |
| Corn | 39 | 3 |
| Carrots | 74 | 5 |
| Broccoli | 40 | 5 |
| Celery | 50 | 3 |
| Squash | 35 | 4 |

TOTAL RETAIL FOOD SALES

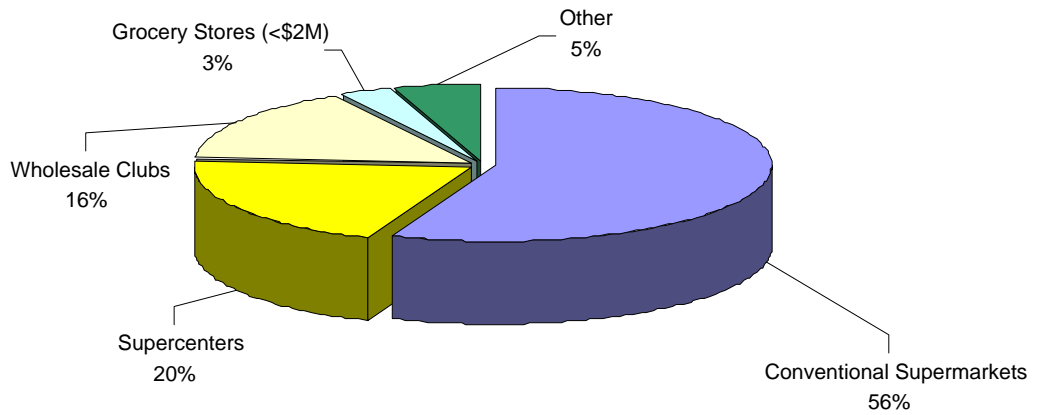
Top Retailers Market Share

Fig. 12 - Top five companies accounted for 51.6% of retail sales in 2005



Distribution of Sales by Store Format

Fig. 13 - Conventional grocery outlets capture 56% of total supermarket sales in 2006



REFERENCES

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- Fig. 2 “2006 Annual Produce Operations Review – Fertile Ground,” *Progressive Grocer*, Oct 15, 2006, pp 21-33
- Fig. 3 The Fresh Look Marketing Group, <http://www.freshlookmarketing.com>
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- Fig. 5 The Fresh Look Marketing Group, <http://www.freshlookmarketing.com>
- Fig. 6 The Fresh Look Marketing Group, <http://www.freshlookmarketing.com>
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- Fig. 7 “2006 Annual Produce Operations Review – Fertile Ground,” *Progressive Grocer*, Oct 15, 2006, pp 21-33
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- Fig. 9 Consumers Expenditures Survey in 2005, Bureau of Labor Statistics, <http://stats.bls.gov/cex/home.htm>
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- Fig. 11 “2006 Annual Produce Operations Review – Fertile Ground,” *Progressive Grocer*, Oct 15, 2006, pp 21-33
- Fig. 12 2006 Directory of Supermarket, Grocery & Convenience Store Chains, Chain Store Guide, <http://www.csgis.com>
- Fig. 13 “74th Annual Report of the Grocery Industry,” *Progressive Grocer*, April 15, 2007, pg 24