

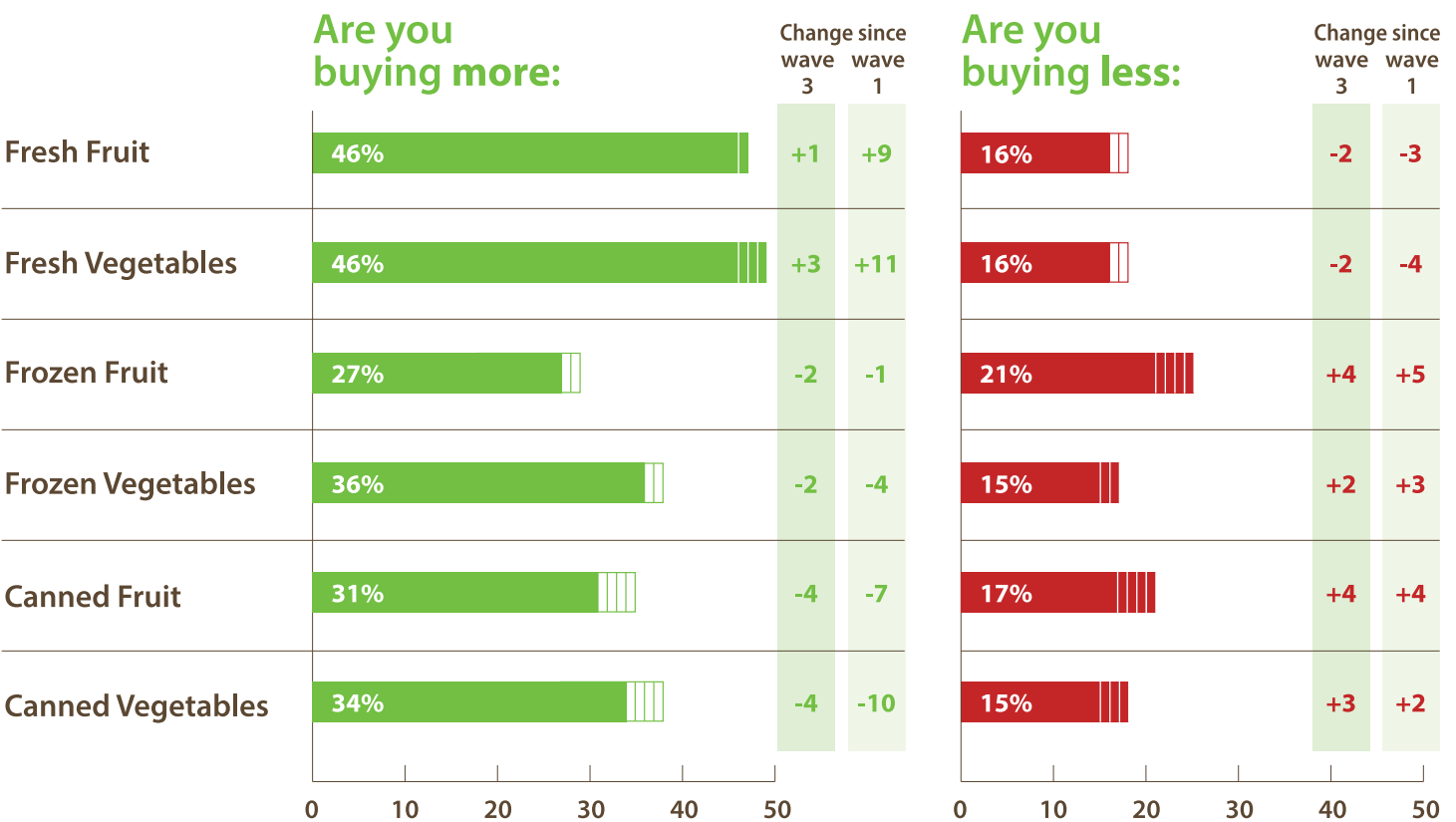


U.S. Consumer Sentiment During the Coronavirus Crisis: Wave 4

PMA's Consumer Sentiment research aims to provide insight into how the Coronavirus pandemic is impacting consumer shopping trends for produce. This is directional information that can help guide PMA and its members with their messaging to consumers during this uncertainty.

"Fresh produce purchasing remains strong overall as more than 8 out of 10 consumers say they are purchasing more or the same amount of both fresh fruit and vegetables as before the COVID-19 outbreak. However, consumers' concern with food costs is continuing to rise. While data shows that produce has had the smallest of increases versus other categories, the perception is present for consumers buying less produce."

- Lauren M Scott, Chief Marketing Officer, PMA



When compared to Wave 1, U.S. shoppers are significantly more likely to say they are purchasing more fresh fruit and vegetables than before the pandemic outbreak, while the number of shoppers who say they are buying less of each is declining.



Why would you say you are buying less fresh produce?

| | | Change since wave 3 | Change since wave 1 |
|---|-----|---------------------|---------------------|
| I am shopping less frequently so I am concerned about how long it will last | 47% | -3 | -4 |
| I am concerned about its safety/cleanliness | 37% | -4 | -4 |
| It is hard to find what I want in the stores where I shop | 29% | 0 | -3 |
| It costs too much/am having financial issues | 22% | +7 | +2 |
| I am not satisfied with the quality that is available where I shop | 12% | +1 | -3 |
| I am concerned about its country of origin/where it was grown | 14% | -7 | 0 |
| I am not that concerned about eating healthy right now | 7% | -2 | -3 |
| I consider eating fresh produce a treat right now | 10% | +1 | +1 |
| I am shopping more online now and don't trust the quality of online produce | 22% | +6 | +13 |

As more U.S. shoppers continue to shift to online purchasing and safety remains a concern, increasing confidence in the quality of fresh produce sold through this channel becomes more critical.

How much do you agree with the following statements?

| | | Change since wave 3 | Change since wave 1 |
|---|-----|---------------------|---------------------|
| I am concerned about the safety/cleanliness of fresh produce now. | 58% | -3 | -3 |
| Since the outbreak, I have been paying more attention to the shelf life of produce so, I try to buy produce that has a longer shelf life. | 58% | -3 | +1 |
| I'd be more likely to buy produce now if it came in sealed containers or bags. | 50% | +1 | -3 |
| I consider eating fresh produce a treat right now. | 47% | -2 | +1 |
| Since the outbreak, I have been paying more attention to the country of origin/where it was grown. | 41% | -4 | -2 |
| I have been substituting frozen or canned fruits and vegetables for fresh produce since the outbreak. | 33% | -10 | -7 |
| Financial concerns are preventing me from buying as much fresh produce as before the outbreak. | 34% | -4 | -5 |
| Eating healthy has declined as a priority in my life right now. | 33% | -3 | 0 |
| Since the Covid-19 outbreak, I am less concerned about my/my family's diet. | 24% | -4 | -2 |

0 10 20 30 40 50 60 70