



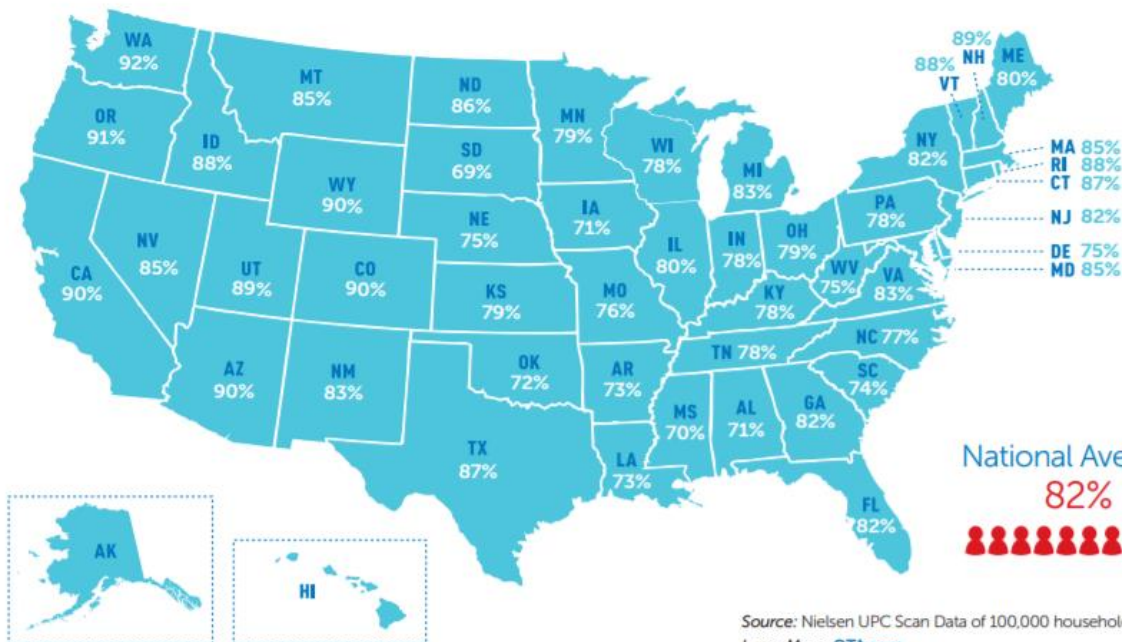
# **Understanding the Organic Consumer Opportunity**

*February, 2019*

The background features a series of concentric circles in light gray, some solid and some dashed, creating a sense of depth and movement. A large, solid orange circle is the central focus, containing the title text. A dark brown, curved shape is positioned behind the orange circle, partially visible on the left side.

# **Quantifying the Opportunity**

## Percentage of U.S. Households Purchasing Organic Products



Data not available for AK + HI

National Average:

82%

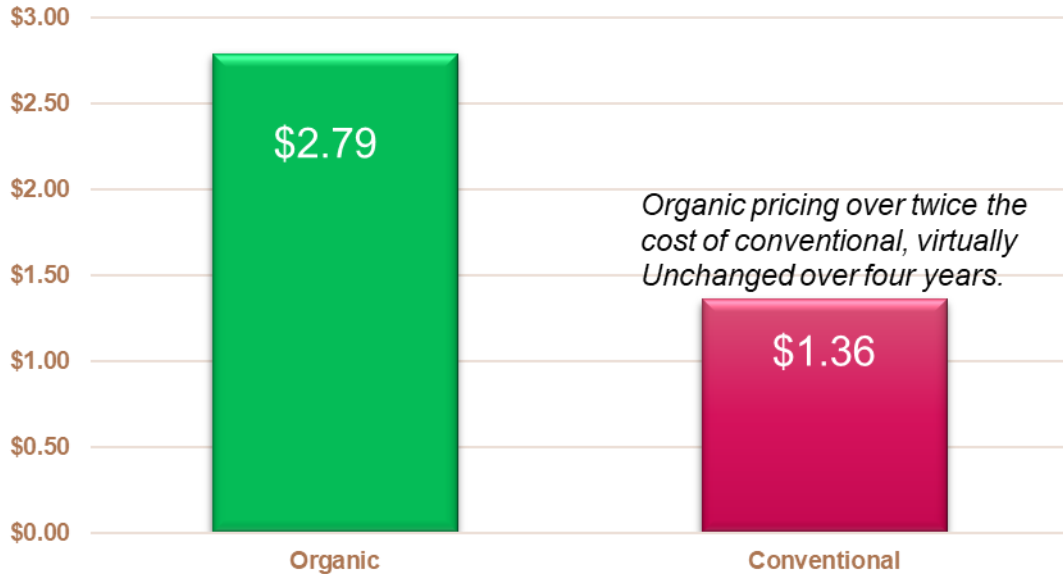


Source: Nielsen UPC Scan Data of 100,000 households, 2016

Learn More: [OTA.com](http://OTA.com)

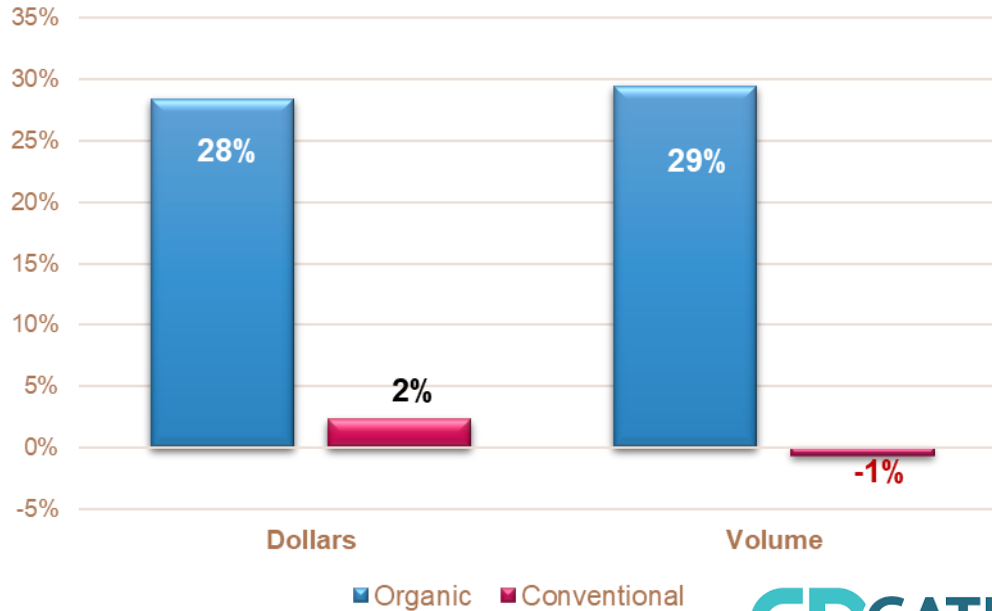
# Organic Produce Performance

## 2018 Average Retail Price



# Organic Produce Performance

## Percentage Growth 2015-2018 Total Produce



# Organic Produce Top 10 Categories

*Packaged salad dollars nearly 3X the #2 category*

| <u>Category</u>        | <u>2018</u>   | <u>\$ Chg.</u> | <u>% Chg.</u> |
|------------------------|---------------|----------------|---------------|
| <b>PACKAGED SALADS</b> | 1,156,155,970 | 75,886,305     | 7%            |
| <b>APPLES</b>          | 394,091,219   | 45,876,320     | 13%           |
| CARROTS                | 339,579,903   | 32,003,400     | 10%           |
| <b>POTATOES</b>        | 312,321,535   | 86,686,330     | 38%           |
| <b>BANANAS</b>         | 302,817,028   | 102,761,878    | 51%           |
| <b>STRAWBERRIES</b>    | 296,618,490   | 93,903,894     | 46%           |
| LETTUCE                | 259,364,737   | 27,824,527     | 12%           |
| <b>BLUEBERRIES</b>     | 258,569,705   | 146,763,740    | 131%          |
| TOMATOES               | 242,005,696   | 29,876,485     | 14%           |
| GRAPES                 | 169,079,627   | 32,535,025     | 24%           |

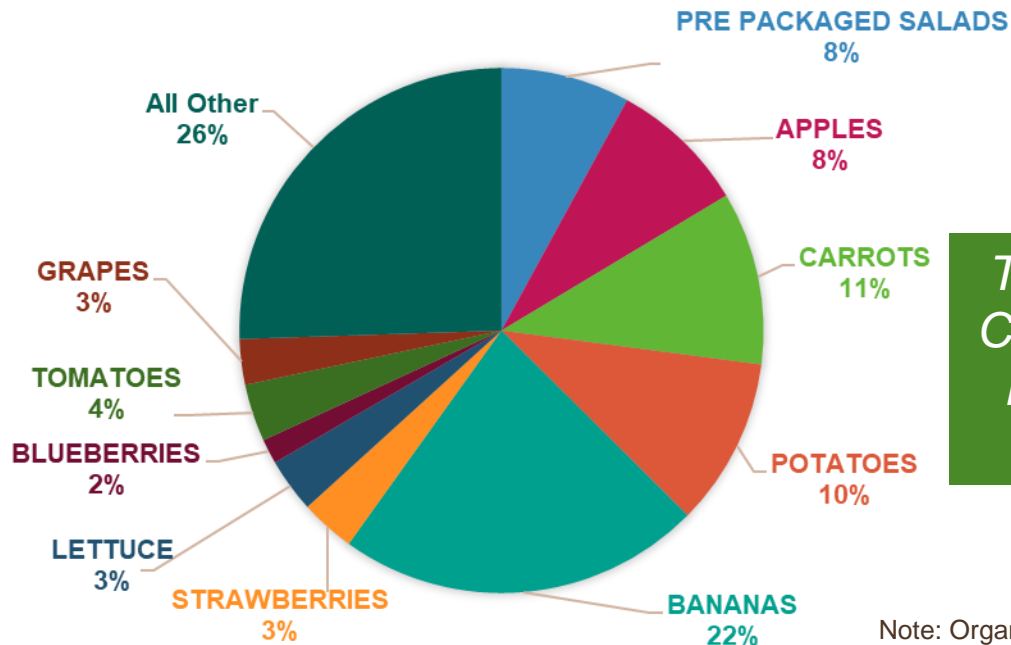
Note: Organic spices/herbs omitted

**CP**CATEGORY  
PARTNERS



# Organic Produce Performance

## ORGANIC VOLUME



*Top 10 Organic Categories drive nearly 75% of volume*

Note: Organic spices/herbs omitted

**CP**CATEGORY  
PARTNERS

Source: Category Partners  
Total US supermarkets, 52 weeks, Jan-Dec.



# Top 10 Percentage Growth Organic Categories

| Category          | % Chg. |
|-------------------|--------|
| SPECIALTY MELONS  | 453%   |
| PAPAYAS           | 422%   |
| BRUSSEL SPROUTS   | 265%   |
| KIWI              | 246%   |
| REMAINING PEPPERS | 234%   |
| CORN              | 219%   |
| LIMES             | 168%   |
| BLACKBERRIES      | 137%   |
| BLUEBERRIES       | 131%   |
| TANGERINES        | 122%   |

Source: Category Partners: Total US supermarkets, 52 weeks, Jan-Dec., 2018 vs. 2015

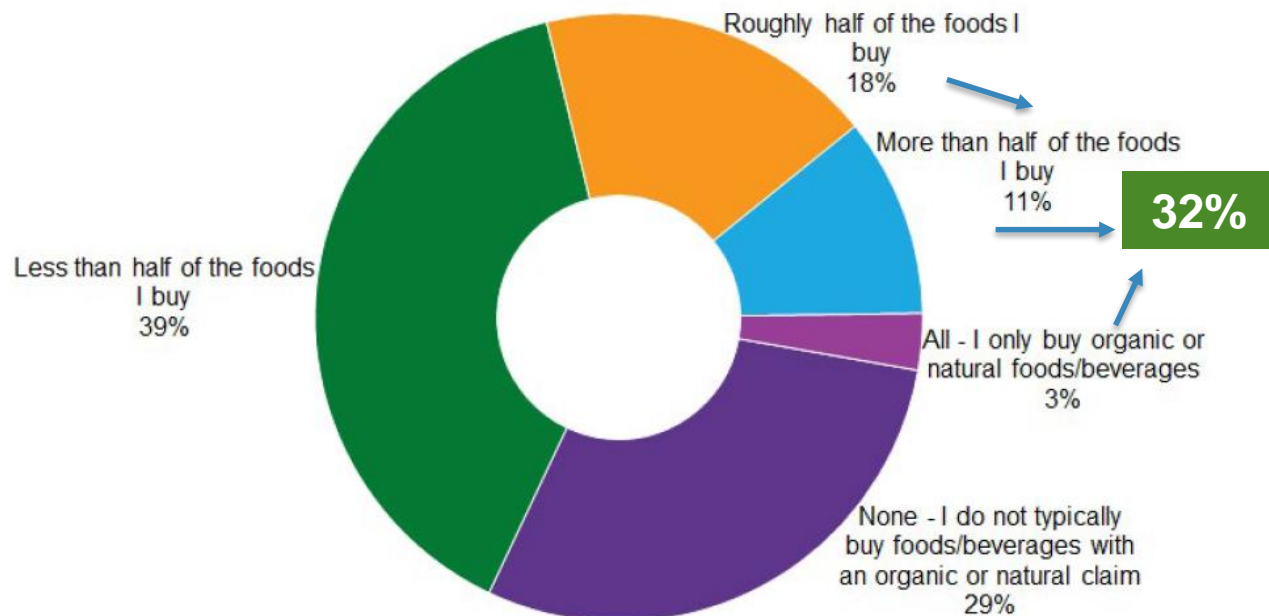




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**Consumers**

*"On a typical grocery shopping trip for your household, what portion of your food or beverage purchases is organic or natural?"*



Base: 2,000 internet users aged 18+

Source: Lightspeed/Mintel



# The Price Barrier is Real

*"On a typical grocery shopping trip for your household, what portion of your food or beverage purchases is organic or natural?"*

*"Which of the following statements do you agree with?"*



Base: 2,000 internet users aged 18+

Source: Lightspeed/Mintel



# Organic Buyers Think Differently

*"Which of the following statements do you agree with?"*

*"Which of the following apply to your organic food/beverage purchase habits?"*



Base: 2,000 internet users aged 18+

Source: Lightspeed/Mintel