National Mango Board: Mango Benchmark Study

52 Weeks Ending October 6, 2012

FRESHFACTS® SHOPPER INSIGHTS

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Mango key findings

In recent trends, mango has continuously grown in dollars and volume across total U.S.

Despite the growth, the percentage of people buying mangos still ranks well below other fruit categories

Annual Household Penetration:

Bananas: 85%
Apples: 71%
Mangos: 14%

Opportunity areas:

Increase household penetration:

Complementary fruits (avocado and stone fruit) have higher annual penetration than mango

Target strongest mango consumer segments:

- Foodies
- Natural/Organic
- Hispanic

Identify cross-merchandising opportunities:

Mango buyers purchase other fruits and popular fresh items

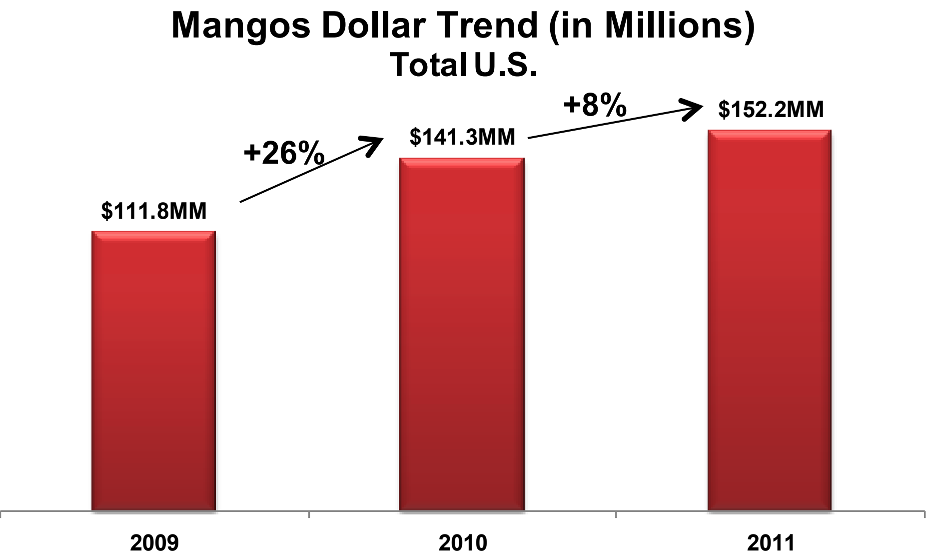
Understand the impact of heavy buyers:

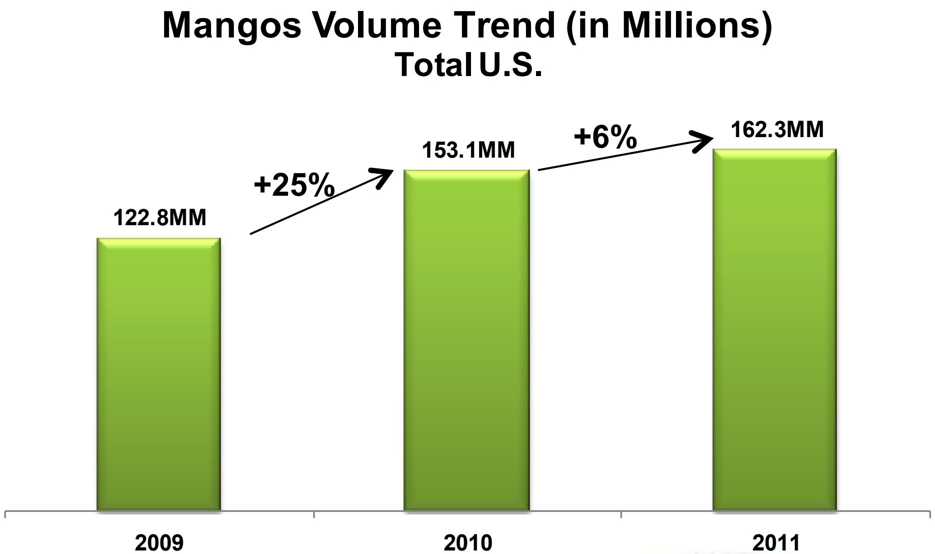
73% of mango dollar sales from heavy buyers

Source: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, 52 weeks ending 10/6/12

Mango sales continuously increased over the past three years

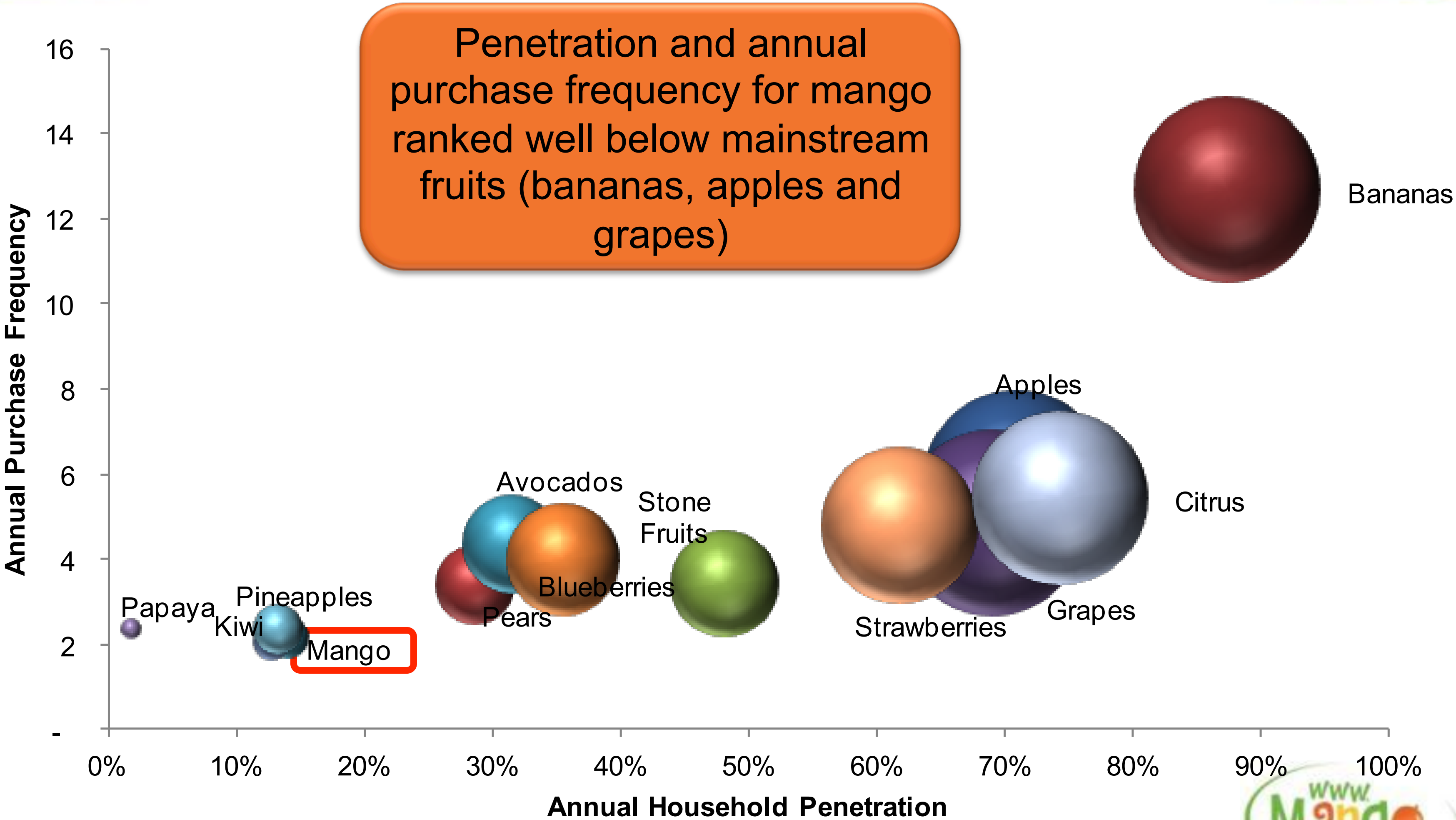
- Mango has a historic trend of growth year -over-year
- Despite continuous sales growth, mango still presents an opportunity for expansion





Source: Nielsen Perishables Group FreshFacts®, stable stores 2009 through 2011

Mango growth was due to a small group of buyers



Note: bubble size represents dollar sales

Source: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, 52 weeks ending 10/6/12

Profile of the mango buyer

Who is the mango buyer?
Mango reaches **14%** of all shopping households, and buyers purchase an average of **2.1** times per year

How much does the mango buyer purchase?
The average mango buyer spends **$2.60** per trip on mangos, and purchases **2.1 units** per trip

How much does the mango buyer spend in the store?
The mango buyer spends **$80** across the entire store when mango is in their basket, while the average produce buyer spends $57 per trip

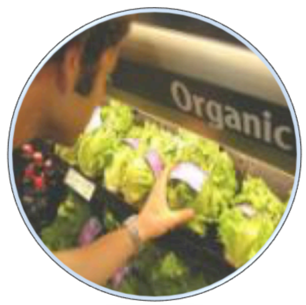
Source: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, 52 weeks ending 10/6/12

Mango sales driven by foodies, natural/organic and Hispanic households

Of the 14% of households that bought mango, the strongest buyers were:

Foodies*

Natural/Organic



Hispanic

These buyers:

- Accounted for 55% of mango dollars sales, but only 46% of total store dollars sales
- Purchased mango between two and three times per year

**Foodies consist of high-priced and premium food buyers*

Source: FreshFacts® Shopper Insights powered by Spire and Spire's proprietary Essence™ shopper segmentation; 52 weeks ending 10/6/12

Mango buyers focus on fresh items and are likely to purchase other produce in the same trip

Fresh accounted for more than half of the most popular items purchased with mangos

The mango basket is more likely than the average basket to contain the following produce items

Avocados
- 9.9 times more likely

Pears
- 7.8 times more likely

Stone Fruits
- 7.2 times more likely

Other Berries
- 6.1 times more likely

Blueberries
- 6.0 times more likely

Strawberries
- 5.4 times more likely

Herb and Spices
- 5.2 times more likely

Squash/Pumpkins
- 4.9 times more likely

Citrus
- 4.8 times more likely

Corn
- 4.3 times more likely

Source: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, 52 weeks ending 10/6/12

All fruits interact with mango, particularly tropical fruits

Having the strongest interaction, tropical fruit buyers were likely to include mango in the basket

However, low penetration limited the number of occurrences

Fruits are complements and interact with mango baskets

Higher penetrated fruits with strong interaction can act as a gateway to increase frequency and reach of mangos







	Mango	Papaya	Kiwi	Pineapple	Avocado	Stone Fruit	Strawberries
Household Penetration	14.0%	1.9%	12.8%	13.3%	31.7%	48.2%	62.0%
Annual Trips per HH	2.1	2.4	2.0	2.3	4.3	3.4	4.8

Source: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, 52 weeks ending 10/6/12

Heavy mango buyers drove mango sales by purchasing more often

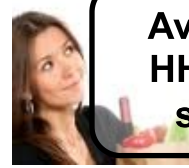
- Heavy mango buyers accounted for almost 75% of dollar sales and made nearly three more mango trips than medium or light buyers
- Heavy mango buyers spent more in the store ($84) than medium ($77) or light buyers ($70)

Shopper Group	% of Mango Dollars	% of HHs	Mango Trips per HH	Mango $ per HH	Mango $ per Trip	Mango Units per HH	Mango Units per Trip	Avg. Store $ per Product Basket
All Mango Buyers	100.0%	100.0%	2.1	$5.55	$2.60	4.4	2.1	$80.29
Heavy Mango Buyers	73.4%	33.4%	3.9	$12.21	$3.09	9.5	2.4	$84.12
Medium Mango Buyers	18.8%	33.3%	1.4	$3.13	$2.20	2.6	1.8	$77.33
Light Mango Buyers	7.8%	33.3%	1.0	$1.31	$1.26	1.2	1.2	$69.95

Source: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, 52 weeks ending 10/6/12

One additional trip by the top third of mango buyers could increase annual mango sales $391 per store






	Annual Mango Trips per Buyer	Average Mango Dollars per Trip	Average HHs per store	Annual Mango Opportunity when Purchased One More Time
Heavy	3.9	$3.09	126	$391 per store
Medium	1.4	$2.20	126	$278 per store
Light	1.0	$1.26	126	$159 per store

The mango opportunity from one additional trip is 41% higher* for heavy buyers than medium buyers

Note: Assumes that the additional trip will be at the average dollars per trip for each buyer group

*Comparison of $391 per store for heavy buyers versus $278 per store for medium buyers

Source: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, 52 weeks ending 10/6/12

Opportunity for mango by focusing on heavy buyers

Despite increased growth year-over-year, mangos are not yet mainstream

Findings

Increase HH penetration:

Complementary fruits (avocados and stone fruit) have higher penetration than mango

Strongest mango consumers:

- Foodies

- Natural/Organic

- Hispanic

Mango buyers purchase fresh:

Other fruits were purchased in the same trip with mango

Heavy buyers drove mango sales:

73% of mango dollar sales from heavy buyers

Heavy buyers present the largest opportunity ($391 per store) from buying one more time

Implications

Expand penetration beyond the niche strong consumers

Increase frequency among top buying groups to grow sales

Tactics

- **Cross-merchandise with other fruits**
- **Promote to prompt trial and increase frequency**
- **Provide education and usage ideas that appeal to new and existing buyers**

Source: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, 52 weeks ending 10/6/12

APPENDIX

National Mango Board: Mango Benchmark Study

APPENDIX A:
Study Contents and Custom Hierarchy

National Mango Board: Mango Benchmark Study

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Objectives and approach

- Objectives
  - To provide a deeper understanding of the mango consumer
  - To enhance the retailer toolkit with consumer shopping behavior, basket interactions and affinities, and top and bottom consumer segments
    - Understand the mango buyer at heavy/medium/light volume levels, what items are in the basket with mango, and if mango is mainstream and has a high household penetration
- Approach
  - The Nielsen Perishables Group created a custom hierarchy to compare mango to other fruit categories via a FreshFacts® Shopper Insights report set
    - Analyzed the report sets and created comprehensive findings with insights and implications
    - Study contents on next page

Study contents

- Buyer behavior and H/M/L
  - Purchase frequency, household penetration, dollars and units per trip in total and by H/M/L (heavy/medium/light) mango buyers
- Buyer and basket interaction
  - Categories most often purchased together with mango
  - Combinations of categories purchased by a household over the course of a year
- Basket affinity
  - Most popular items purchased with mango
  - Items more likely to be in a mango basket than in the average basket
- Essence™
  - Which consumer segments are strongest for each mango

Custom hierarchy

Category

- Apples
- Avocados
- Bananas
- Blueberries
- Cherries
- Citrus
- Grapes
- Kiwi
- **Mango**
- Melons
- Other Berries
- Other Fresh Fruits
- Other Specialty Fruit
- Papaya
- Pears
- Pineapple
- Stone Fruits
- Strawberries
- Value-Added Fruit

APPENDIX B:
Spire Loyalty Network

National Mango Board: Mango Benchmark Study

Shopper Insights parameters

- Through a partnership with Spire, Nielsen Perishables Group develops insights around shopper dynamics and switching behaviors by accessing **shopper loyalty card data**

The **Spire Loyalty Network™** retailer composite includes multiple regional grocery chains

- Comprised of <u>every product</u> in the store, including all fresh department items, even non-UPC and random-weight items

- Spire Loyalty Network™ panel characteristics:
  - 30 million+ U.S. households in total and growing
    - Over 4 million “static” regular shoppers for analysis
  - 12 retail banners with more than 1,600 stores across 24 states
  - Closely matches U.S. census demographic profile

Source: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, 52 weeks ending 10/6/12

The Spire Loyalty Network™

Comparison of Spire Loyalty Network™ Composite to U.S. Census

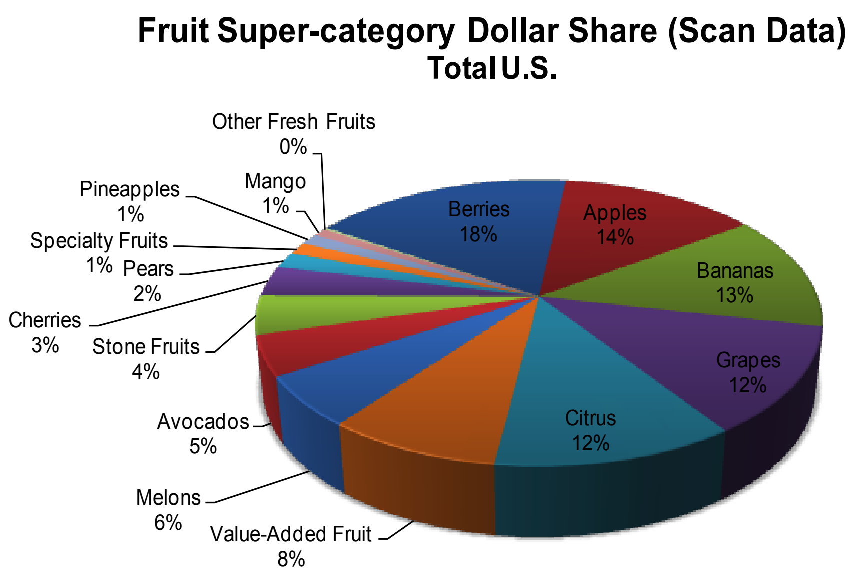
U.S. Census Demographics	Index Comparison
Income	
Median household income	102
Household	
Female persons	98
Persons per household	100
Homeownership rate	101
Living in the same houses in 1995 and 2005, pct 5 yrs old & over	107
Age	
Persons under 5 years old	96
Persons under 18 years old	98
Persons 65 years old and over	102
Race	
White persons	97
Black persons	129
Asian persons	82
Persons of Hispanic or Latino origin	72
Education	
High school graduate	100
Bachelor's degree or higher	99

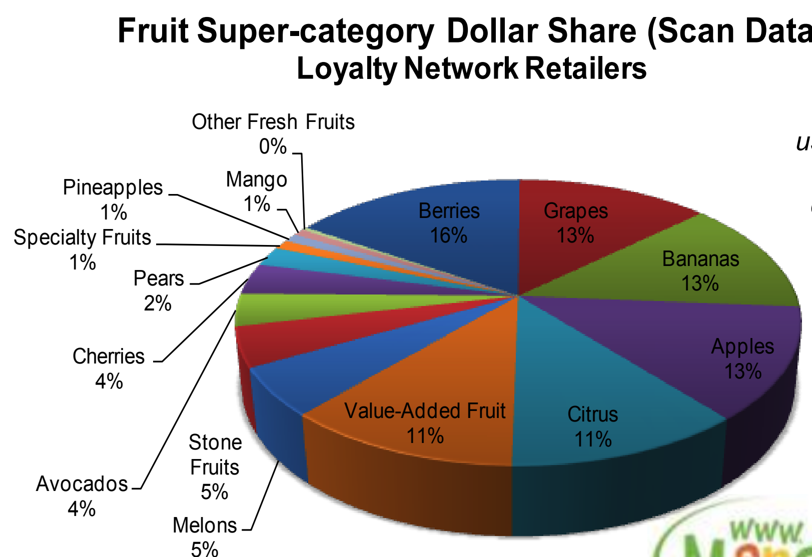
All Shopper Insights solutions also include comparison sales performance data from FreshFacts® to understand trends and impact of this retail composite

Source: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire

Report parameters

- **Geography:** Spire Loyalty Network™ retailer composite
- **Time Period:** 52 weeks ending 10/6/2012
- **Level of Detail:** super-category (fruits) by category (mango separated out of specialty fruit)
- **Hierarchy:** custom hierarchy





**Pie charts use standard hierarchy, data ending 9/29/12*

Source: Nielsen Perishables Group FreshFacts®, Spire Loyalty Network composite, 52 weeks ending 10/6/12

APPENDIX C:
FreshFacts® Shopper Insights Dashboard and H/M/L Analysis

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Profile of the mango buyer

Who is the mango buyer?
Mango reaches **14%** of all shopping households, and buyers purchase an average of **2.1** times per year

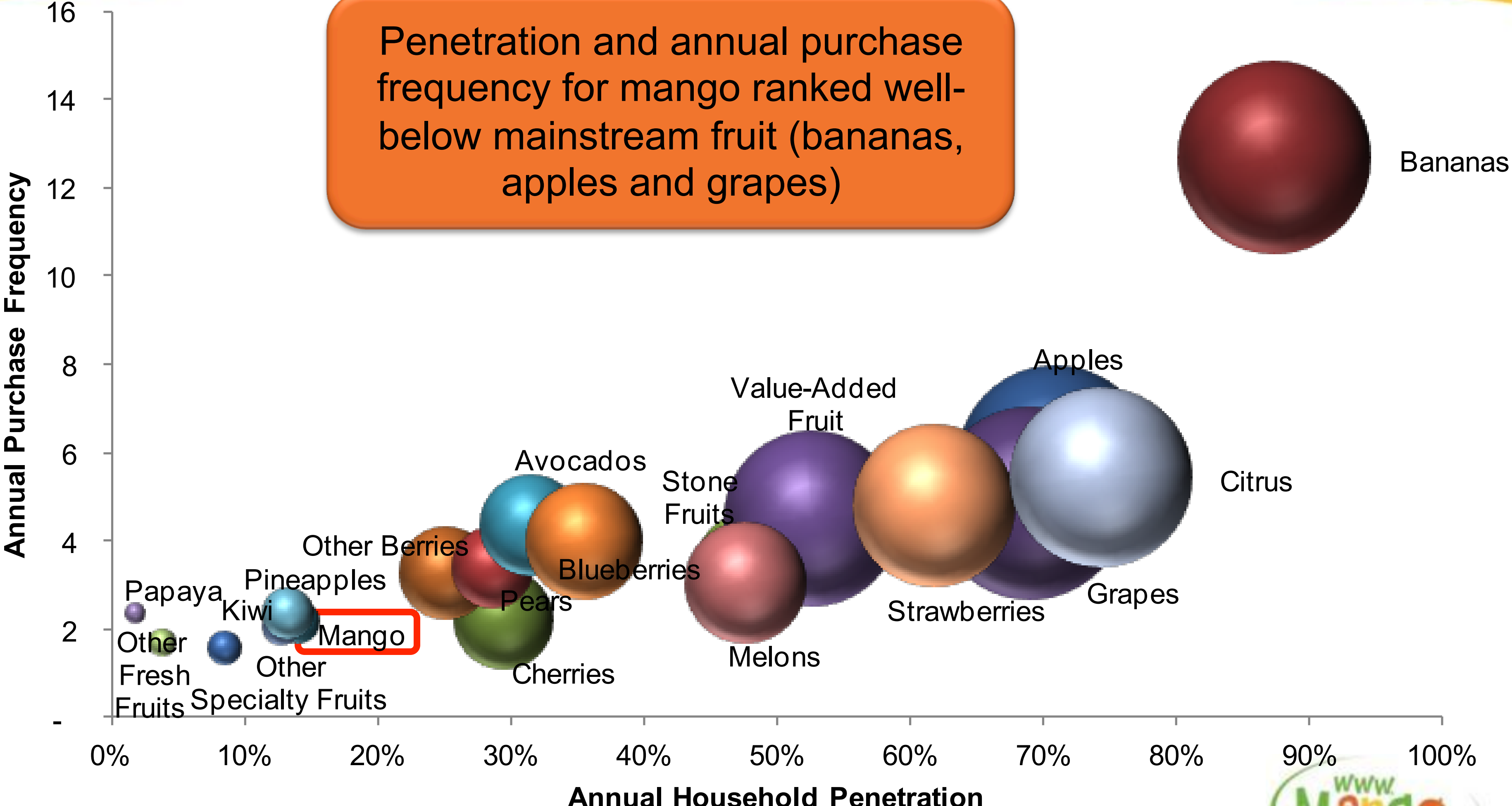
How much does the mango buyer purchase?
The average mango buyer spends **$2.60** per trip on mango, and purchases **2.1 units** per trip

How much does the mango buyer spend in the store?
The mango buyer spends **$80** across the entire store when mango is in in the basket, while the average produce buyer spends $57 per trip

Source: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, 52 weeks ending 10/6/12

Opportunity to increase penetration and frequency for mango

Penetration and annual purchase frequency for mango ranked well-below mainstream fruit (bananas, apples and grapes)



Note: bubble size represents dollar sales

Source: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, 52 weeks ending 10/6/12

Key measures for fruit categories

	10/09/2011 - 10/06/2012			
Category	Penetration	Trips per HH	Net $ per Trip	Volume per Trip
Bananas	87.5%	12.6	$1.41	2.1
Citrus	74.5%	5.4	$3.40	2.2
Apples	71.0%	5.7	$3.91	2.2
Grapes	69.1%	4.8	$4.63	2.1
Strawberries	62.0%	4.8	$3.73	1.3
Value-Added Fruit	52.7%	4.5	$5.48	1.6
Stone Fruits	48.2%	3.4	$3.10	1.6
Melons	47.8%	3.0	$4.27	0.2
Blueberries	35.7%	3.9	$3.99	1.3
Avocados	31.7%	4.3	$3.08	2.0
Cherries	29.5%	2.2	$6.27	2.0
Pears	28.7%	3.4	$2.77	1.6
Other Berries	25.2%	3.2	$4.36	1.5
Mango	14.0%	2.1	$2.60	2.1
Pineapples	13.3%	2.3	$3.48	1.1
Kiwi	12.8%	2.0	$2.03	2.9
Other Specialty Fruits	8.5%	1.6	$3.38	1.4
Other Fresh Fruits	3.9%	1.7	$5.04	1.2
Papaya	1.9%	2.4	$3.78	1.1

Source: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, 52 weeks ending 10/6/12

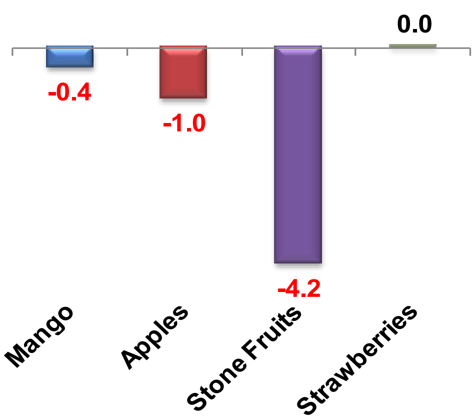
Penetration steady for mango, but decreased for apples and stone fruits

Metric

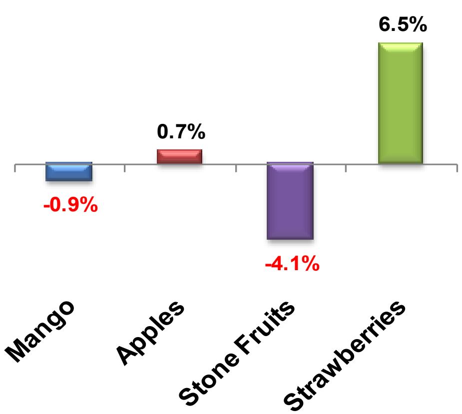
	Mango	Apples	Strawberries	Stone Fruits
Penetration	14.0%	71.0%	62.0%	48.2%
Volume per Trip	2.1	2.2	1.3	1.6
Dollars per Trip	$2.60	$3.91	$3.73	$3.10
Avg. Basket Size	$80.29	$83.38	$83.33	$76.09

Change

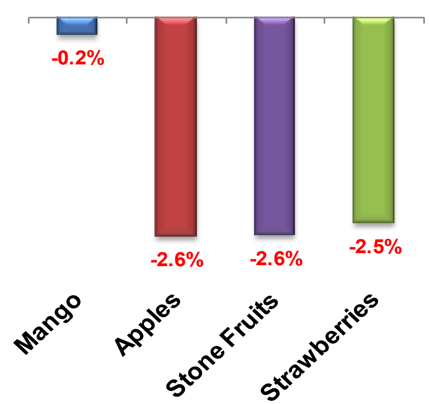
Penetration
Point Change



Trips per Buyer
% Change



Volume per Trip
% Change



Volume per trip remained steady for mango

Source: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, 52 weeks ending 10/6/12

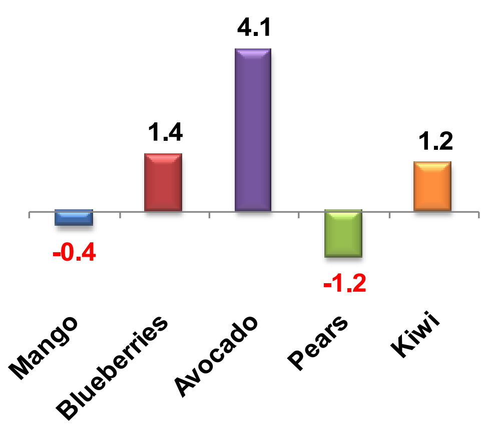
Mango could expand similarly to avocados

Metric

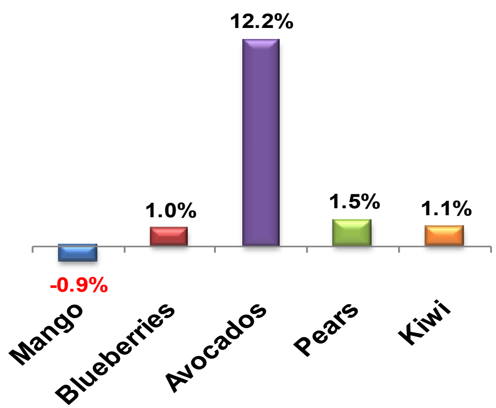
	Mango	Blueberries	Avocado	Pears	Kiwi
Penetration	14.0%	35.7%	31.7%	28.7%	12.8%
Volume per Trip	2.1	1.3	2.0	1.6	2.9
Dollars per Trip	$2.60	$3.99	$3.08	$2.77	$2.03
Avg. Basket Size	$80.29	$85.34	$77.76	$84.76	$87.35

Change

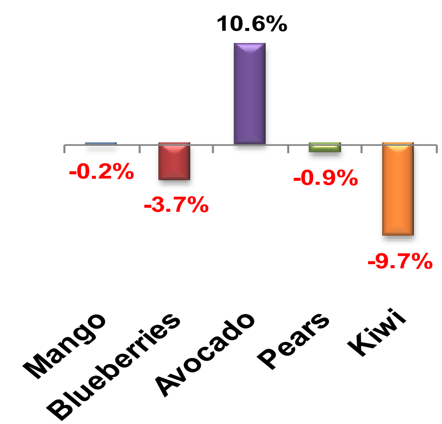
Penetration
Point Change



Trips per Buyer
% Change

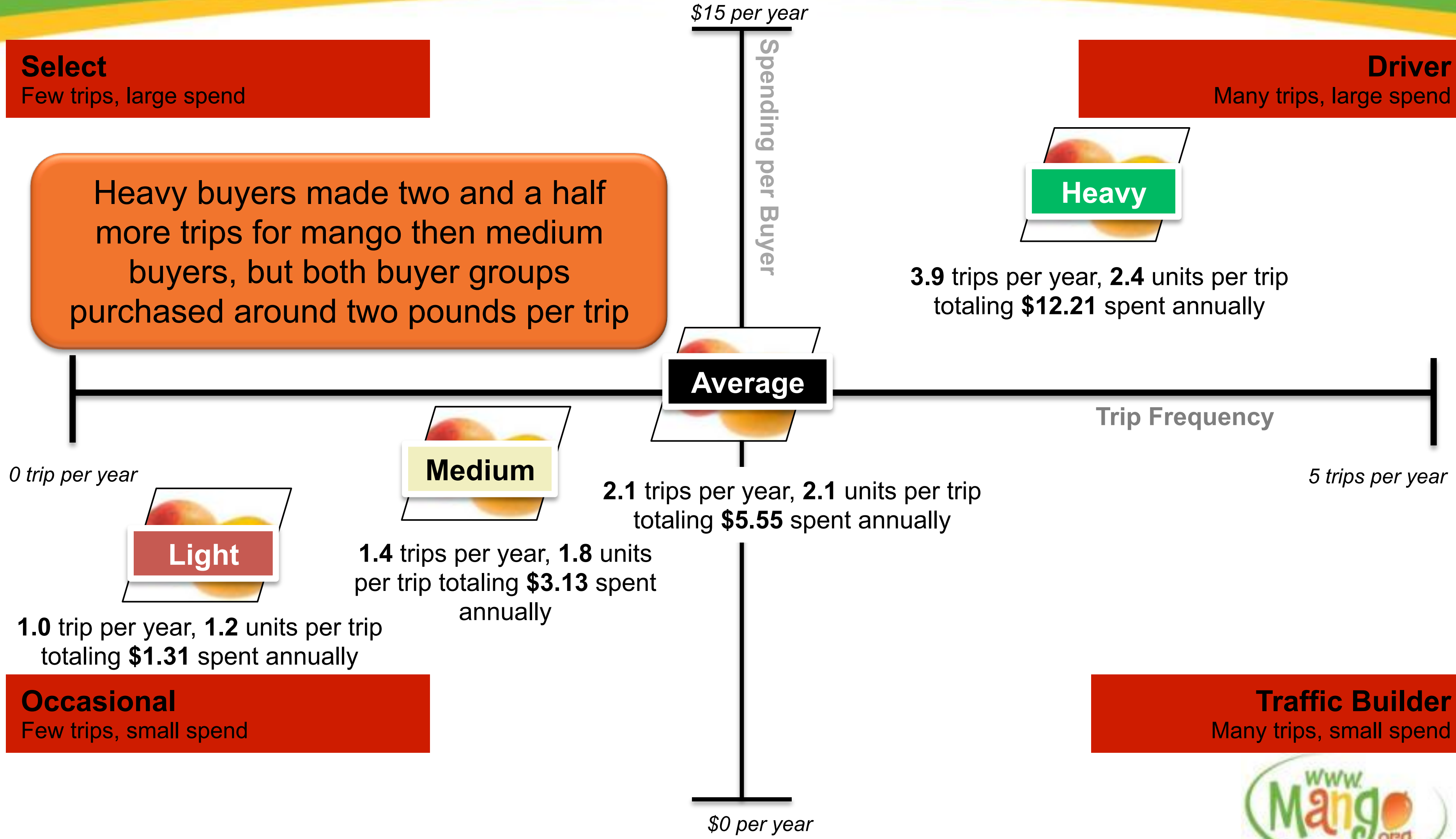


Volume per Trip
% Change



Source: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, 52 weeks ending 10/6/12

Heavy mango buyers' frequency drove category sales



Source: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, 52 weeks ending 10/6/12

Heavy mango buyers accounted for two-thirds of dollar sales

Heavy mango buyers represented a larger share of sales due to making more trips for mango

- Heavy buyers made nearly three more trips than the medium and light buyers
- Heavy mango buyers spent more in the store ($84) than medium ($77) or light buyers ($70)

Shopper Group	% of Mango Dollars	% of HHs	Mango Trips per HH	Mango $ per HH	Mango $ per Trip	Mango Units per HH	Mango Units per Trip	Avg. Store $ per Product Basket
All Mango Buyers	100.0%	100.0%	2.1	$5.55	$2.60	4.4	2.1	$80.29
Heavy Mango Buyers	73.4%	33.4%	3.9	$12.21	$3.09	9.5	2.4	$84.12
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Source: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, 52 weeks ending 10/6/12

APPENDIX D:
Buyer and Basket Interaction

National Mango Board: Mango Benchmark Study

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Two possibilities for products to interact

- Percent of Buyers and Baskets
  - ***What:*** *The share of all buyers or baskets where these two products appear together*
  - ***Why:*** *Sizes the interaction giving weight to combinations with broader appeal versus just higher likelihood*
  - ***How****: Useful to separate most popular combinations, if goal is to expand reach*

- **Buyer Interaction**

E.g. The percentage of mango buyers that purchased the comparison category within a 52-week time period

95% of **mango** buyers also purchased **bananas** in the latest 52 weeks

- **Basket Interaction**

E.g. The percentage of mango buyers that purchased the comparison category within the same shopping trip

45% of **mango** buyers purchased **bananas** in the same transaction

Source: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, 52 weeks ending 10/6/12

Weighing the likelihood of interaction

- Interaction Indexes
  - ***What:*** *Measures the probability that two products interact compared to any two products appearing together*
  - ***Why:*** *Determines if products are considered* ***complementary*** *(high basket and buyer interaction) or* ***substitutes*** *(low basket, but high buyer)*
  - ***How:*** *Identifies which products are much more likely to interact*

For example, 95% of mango buyers purchased bananas.
However, 88% of all buyers purchase bananas.
So, the buyer interaction index of mango and bananas is 107 (95%/88%).
While a larger percentage of mango buyers purchased bananas, the likelihood was about average.

Bananas, citrus and apples purchased with mango more often than other categories

Category	HH Penetration	% of Mango Buyers Purchasing:	Buyer Interaction Index	% of Mango Baskets Containing:	Basket Interaction Index
Bananas	87.5%	95.4%	107	44.5%	87
Citrus	74.5%	90.6%	119	25.0%	134
Apples	71.0%	85.7%	119	21.3%	113
Grapes	69.1%	83.7%	119	17.3%	112
Strawberries	62.0%	80.4%	127	20.3%	148
Value-Added Fruit	52.7%	62.7%	119	9.8%	94
Stone Fruits	48.2%	71.5%	146	15.2%	200
Melons	47.8%	66.7%	135	11.6%	168
Blueberries	35.7%	54.4%	151	10.8%	167
Avocados	31.7%	60.3%	187	17.4%	275
Cherries	29.5%	47.9%	160	4.8%	163
Pears	28.7%	51.1%	175	9.7%	215
Other Berries	25.2%	43.6%	168	7.0%	182
Mango	14.0%	-	-	-	-
Pineapples	13.3%	27.1%	200	5.3%	364
Kiwi	12.8%	30.1%	230	6.8%	561
Other Specialty Fruits	8.5%	20.5%	237	2.0%	319
Other Fresh Fruits	3.9%	4.8%	121	0.3%	94
Papaya	1.9%	6.5%	345	1.4%	707

Source: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, 52 weeks ending 10/6/12

APPENDIX E:
Basket Affinity

National Mango Board: Mango Benchmark Study

Co-promotion opportunities with categories with high penetration

The mango buyer purchased staples for the household

Mango Shopping List:*

- Bananas
- Milk
- Yogurt
- Packaged Bread
- Salty Snacks
- Tomatoes
- Packaged Cheese
- Citrus
- Meat - Beef
- Carbonated Soft Drinks
- Meat – Chicken
- Rfg Juices and Drinks
- Onions
- Apples
- Strawberries

Popular fresh items

* Most common companion items among categories with an affinity index over 100

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Source: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, 52 weeks ending 10/6/12

Mango buyers shop around the produce department

Affinity Index

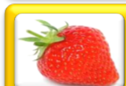

Avocados
- 9.9 times more likely


Pears
- 7.8 times more likely

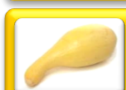

Stone Fruits
- 7.2 times more likely

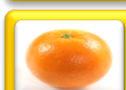

Other Berries
- 6.1 times more likely


Blueberries
- 6.0 times more likely


Strawberries
- 5.4 times more likely


Herb and Spices
- 5.2 times more likely


Squash/Pumpkins
- 4.9 times more likely


Citrus
- 4.8 times more likely


Corn
- 4.3 times more likely

- Mango buyers were 9.9 times more likely to have avocados in their basket than the average shopper's basket
- Mango shoppers likely to have a variety of produce in the household
  - Avocados, pears, stone fruits, other berries and blueberries were in their basket with mango
  - Based on affinity index, non-produce items that ranked among the top 30 categories included ethnic grocery, fin fish, deli dips, deli specialty cheese, yogurt and dry legumes
- Keep the consumer in the department by co-promoting with other fresh produce products

Note: Affinity index = item's penetration among baskets with mango/item's penetration among all baskets

Source: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, 52 weeks ending 10/6/12

APPENDIX F:
Essence™

National Mango Board: Mango Benchmark Study

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Essence™: "You are what you buy"

- Proprietary method for consumer profiling
- Based on actual purchase history throughout the store
- Grouped into 8 dimensions mapped to 40 segments

The Essence™ Dimensions:

Kids	**Ethnic Skew**	**Special Needs**	**Health & Wellness**
Age & Gender	**Affluence**	**Cooking Style**	**Dieting Style**

Source: FreshFacts® Shopper Insights powered by Spire and Spire's proprietary Essence™ shopper segmentation; 52 weeks ending 10/6/12

Profile of the mango consumer

- Mango had a higher appeal to those seeking general health benefits (such as natural/organic consumers), Hispanic consumers, and consumers who purchase high-priced and premium food

Source: FreshFacts® Shopper Insights powered by Spire and Spire's proprietary Essence™ shopper segmentation; 52 weeks ending 10/6/12

Top and bottom buyer themes for mango

- Top and bottom buyer segments for mango can be grouped into “themes”
  - Top buyer segment themes

Foodies*	Natural/Organic	Hispanic

**Foodies consists of high-priced and premium food buyers*

  - Bottom buyer segment themes

Convenience	Kid-Friendly Meals	Non-Foodies	Value and Convenience

Source: FreshFacts® Shopper Insights powered by Spire and Spire’s proprietary Essence™ shopper segmentation; 52 weeks ending 10/6/12

Top and bottom buyer segments for mango

- Top segments have higher sales share for mango than store, indicating more important to mango
  - Top segments cumulatively represent **55%** of mango sales share and **46%** of store sales share

Natural/ Organic | Hispanic | Foodies*

Convenience | Kid-Friendly Meals | Non-Foodies | Value and Convenience

Essence Segment	HH Penetration Among Each Segment	% Mango Sales	% Store Sales
Top 10 Segments			
Natural & Organic Families	31.5%	2.8%	2.3%
Natural & Organic Couples	29.1%	7.4%	5.7%
Hispanic Young Families	28.1%	5.8%	3.7%
Hispanic Kid-Focused Families	24.8%	0.3%	0.2%
Hispanic Couples	24.4%	7.5%	3.8%
Premium Healthy Living Families	24.4%	7.7%	8.1%
Finest Fresh Foodie Couples	24.0%	7.1%	6.3%
Premium Families w ith Babies	21.9%	0.8%	0.8%
Premium Healthy-Living Couples	21.1%	13.2%	12.6%
Finest-Focused Families	17.4%	2.4%	2.4%
Bottom 10 Segments			
Finest-Focused Singles/Couples	9.2%	1.2%	1.5%
On-the-Go Quick-Cooking Families	8.9%	2.7%	4.5%
Value Kid-Focused Families	8.1%	0.2%	0.3%
Kid-Focused Families	7.8%	0.6%	1.2%
On-the-Go Watching the Waistline Singles/Couples	7.3%	1.1%	1.2%
Value Older Adults	7.1%	0.2%	0.2%
Sunday Dinner Couples	7.1%	0.4%	0.8%
Value Meat & Potatoes Couples	6.6%	0.5%	0.6%
Value Quick-Cooking Singles	6.4%	1.0%	1.3%
Quick-Cooking Singles	6.0%	1.3%	1.9%

Foodies consists of high-priced and premium food buyers

Source: FreshFacts® Shopper Insights powered by Spire and Spire's proprietary Essence™ shopper segmentation; 52 weeks ending 10/6/12

Five of the Top 10 Segments

Essence Segment	Demographic Description	Purchase Behavior Description
Natural & Organic Families	Families with kids whose purchase behavior skews strongly to organic and natural products.	Skew to organic milk, produce and basics, eco-friendly non-food, natural HBC, soy and gluten-free products, organic baby food, healthy kids lunchbox/snack food, and premium products with enhanced health benefits.
Natural & Organic Couples	Households without kids whose purchase behavior skews strongly to organic and natural products.	Skew to organic milk, produce, Indian and Asian foods, organic basics, eco-friendly non-food, natural HBC, vegetarian foods, soy products, premium products with enhanced health benefits, soy products, and premium meats/cheeses.
Hispanic Young Families	Families with kids with a strong skew to Hispanic products, indicating a high likelihood of Hispanic/Caribbean ethnicity.	Purchases skew to Hispanic fres/frozen/ss food and beverages, ethnic HBC, Caribbean foods, value kids breakfast, kids yogurt, kids quick value meals, value HBC, and value quick cook and heat-and-eat meals.
Hispanic Kid-Focused Families	Families with kids with a strong skew to Hispanic products, indicating a high likelihood of Hispanic/Caribbean ethnicity, and a stronger focus on kids products, indicating a larger family.	Purchases skew to Hispanic fres/frozen/ss food and beverages, ethnic HBC, Caribbean foods, value kids breakfast, kids yogurt, kids lunchbox snacks, kids indulgent treats, kids quick value meals, value HBC, and value quick cook and heat-and-eat meals.
Hispanic Couples	Households without kids with a strong skew to Hispanic products, indicating a high likelihood of Hispanic/Caribbean ethnicity.	Purchases skew to Hispanic fres/frozen/ss food and beverages, ethnic HBC, Caribbean foods, value meats, value HBC products, fresh fish and grilling, and soul food.

Source: FreshFacts® Shopper Insights powered by Spire and Spire's proprietary Essence™ shopper segmentation; 52 weeks ending 10/6/12

Five of the Top 10 Segments

Essence Segment	Demographic Description	Purchase Behavior Description
Premium Healthy Living Families	Affluent families with kids. They tend to make meals at home, either simple meals (Meat & Potatoes) or fresh home cooked meals. They tend to be small/medium-sized families with kids.	They tend to buy healthier kid items, including healthier lunchbox items, as well as convenience prepared produce, convenience cleaning items, healthier dairy indulgent treats, and produce (incl. Organic produce).
Finest Fresh Foodie Couples	Highly affluent households without kids. They do a lot of home cooking, and tend to cook from scratch using fresh ingredients. They watch what they eat, but don't count calories, and tend to prefer premium and healthy fresh foods.	They buy premium beer/wine/liquor, premium meat and cheese, premium Italian products, and products with enhanced health benefits, such as PomWonderful and eggs with Omega-3. Many may be of Italian ethnicity, or skew toward Italian cooking style.
Premium Families with Babies	Households with babies, whose purchase behavior skews to more premium-priced products. Many prepare simple meals at home or purchase prepared foods. Many of these households are focused on healthy eating, and over one in ten is a heavy natural/organic household.	Their purchases skew to organic/healthy baby food, mainstream baby food/formula/care, organic milk, organic & eco products, natural HBC products, premium beer/wine/liquor, and other premium family products.
Premium Healthy-Living Couples	Affluent households without kids. They cook at home also, but don't have as strong a fresh skew as Super Premium HHs. They watch what they eat, but don't count calories.	They skew to fresh fish, convenience prepared produce, produce basics (including organic produce), Asian products, premium Italian products, and products with enhanced health benefits.
Finest-Focused Families	Households with kids whose purchase behavior shows a strong skew to premium products but does not show a strong health focus. Tend to be smaller families.	Tend to purchase kid foods, as well as high premium foods like premium meats and cheeses.

Source: FreshFacts® Shopper Insights powered by Spire and Spire's proprietary Essence™ shopper segmentation; 52 weeks ending 10/6/12

Five of the Bottom 10 Segments

Essence Segment	Demographic Description	Purchase Behavior Description
Finest-Focused Singles/Couples	Highly premium-driven households without kids whose purchase behavior shows a strong skew to premium products, but doesn't show a strong health focus.	Tend to purchase simple prepared meals, and their purchase behavior skews to highly premium priced products such as premium beer/wine/liquor, premium pet products, premium non-food, etc.
On-the-Go Quick-Cooking Families	Households with kids who need easy meal solutions, and who don't skew to premium or health-focused products.	Purchase quick cook meals/sides, kids breakfast, kids frozen breakfast, kids lunchbox products, toddler meals/diapers, sweet treats, and quick baking.
Value Kid-Focused Families	Families with children whose purchase behavior shows a heavy skew to kid-oriented products, indicating larger families with multiple kids, or kid-focused smaller families.	Purchase behavior also indicates a skew to value products. Also likely to rely on quick cook meals. Purchases skew to kid products of all types, sweet treats, value quick cook meals, and value family basics.
Kid-Focused Families	Families with children whose purchase behavior shows a heavy skew to kid-oriented products, indicating larger families with multiple kids, or kid-focused smaller families. More likely to rely on quick cook meals and simple prepared foods.	Purchases skew to kid products of all types, as well as quick meal solutions.
On-the-Go Watching the Waistline Singles/ Couples	Households without kids who are watching their calorie or fat intake, while needing quick-cook meal solutions and simple prepared foods.	They buy reduced fat/calorie and light foods, are most likely to rely on diet aids, sugar-free products, and supplements. They also purchase deli prepared foods, canned foods, and quick-cook meals and sides.

Source: FreshFacts® Shopper Insights powered by Spire and Spire's proprietary Essence™ shopper segmentation; 52 weeks ending 10/6/12

Five of the Bottom 10 Segments

Essence Segment	Demographic Description	Purchase Behavior Description
Value Older Adults	Smaller households with older adults whose purchase behavior shows a skew to value products.	Purchase older adult products, value beer/wine/ liquor, value family basics, value quick cook and heat-and-eat meals, canned foods, and soul food.
Sunday Dinner Couples	Smaller households without kids whose purchase behavior indicates that they cook at home, and who don't skew to premium, value or health-focused products.	Purchase meat, including large special-occasion meat cuts, grilling meats/foods, quick versatile meats, soul foods and sweet treats.
Value Meat & Potatoes Couples	Smaller households without kids whose purchase behavior indicates that they skew to value products and cook at home, but don't skew to health-focused products.	Purchase value beer/wine/liquor, value meats, soul food, grilling meats, and value basics.
Value Quick-Cooking Singles	Smaller value-focused households who need easy meal solutions, and who don't skew to health-focused products.	Purchase tobacco, value beer/wine/liquor, value quick cook meals and sides and value heat-and-eat meals.
Quick-Cooking Singles	Smaller households who need easy meal solutions, and who don't skew to premium or health-focused products.	Skew to tobacco, mainstream beer/wine/liquor, quick cook meals/sides, quick heat-and-eat meals, and value sweet treats.

Source: FreshFacts® Shopper Insights powered by Spire and Spire's proprietary Essence™ shopper segmentation; 52 weeks ending 10/6/12

APPENDIX G:
Essence™ Definitions

National Mango Board: Mango Benchmark Study

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40 Essence™ segments

Healthy Living Couples
1 Finest Fresh Foodie Couples
2 Premium Healthy-Living Couples
3 Healthy Living Couples
4 Eating Right Value Couples

Healthy Living Families
5 Premium Healthy Living Families
6 Eating Right On-the-Go Families
7 Eating Right Value Families

Premium On-the-Go Couples & Families
8 Premium On-the-Go Couples
9 Premium On-the-Go Families

Watching the Waistline Singles/Couples
10 Finest Fresh Watching the Waistline Singles/Couples
11 Premium Watching the Waistline Singles/Couples
12 On-the-Go Watching the Waistline Singles/Couples

Watching the Waistline Families
13 Premium Watching the Waistline Families
14 On-the-Go Watching the Waistline Families

Finest-Focused Couples and Families
15 Finest-Focused Singles/Couples
16 Finest-Focused Families

Low-Cooking Singles
17 Quick-Cooking Singles
18 Value Quick-Cooking Singles

Quick Cooking Families
19 On-the-Go Quick-Cooking Families
20 On-the-Go Value Quick-Cooking Families

Meat & Potatoes Couples
21 Sunday Dinner Couples
22 Value Meat & Potatoes Couples

Meat & Potatoes Families
23 Value Meat & Potatoes Families
24 Meat & Potatoes Families

Families with Babies
25 Premium Families with Babies
26 Young Families with Babies
27 Value Young Families with Babies

Kid-Focused Families
28 Premium Healthy Kid-Focused Families
29 Kid-Focused Families
30 Value Kid-Focused Families

Older Adults
31 Healthy Living Older Adults
32 Quick Convenience Older Adults
33 Value Older Adults

Natural/Organic Households
34 Natural & Organic Couples
35 Natural & Organic Families

Hispanic Households
36 Hispanic Couples
37 Hispanic Young Families
38 Hispanic Kid-Focused Families

Kosher Households
39 Kosher Couples
40 Kosher Families

Source: FreshFacts® Shopper Insights powered by Spire and Spire's proprietary Essence™ shopper segmentation; 52 weeks ending 10/6/12

Definition of Healthy Living segments

Sample Image	Description	Sample High-Index Products

Healthy Living Couples

4 Essence segments: 1) Finest Fresh Foodie, 2) Premium Healthy-Living, 3) Healthy Living, 4) Eating Right Value

- No kids
- Range from 55 to 75+ years of age
- Trying to eat right but doesn't count calories
- Range from Highly Affluent to Less Affluent
  - Affluent tend to cook at home, esp. using scratch / fresh ingredients
  - Middle Income / Less Affluent skew towards simple meal makers or quick meal solutions

- Products with enhanced health benefits
- Produce Basics (mostly Fresh but some Canned for less affluent)
- Meats, Fish, and Cheeses
- Beer / Wine / Liquor
- Italian products

Healthy Living Families

3 Essence segments: 1) Premium Healthy Living, 2) Eating Right On-the-Go, 3) Eating Right Value

- Families with Kids
- Likely to be 35-44 or 35-54 for higher income
- Trying to eat right but doesn't count calories
- Range from Affluent to Lower Income
  - Affluent tend to be small families and cook at home, either simple or fresh
  - Middle- and Lower-Income may cook at home but rely more on easy meal solutions, yet still skew more to fresh and produce relative to their income bracket

- Healthier kid items, incl. lunchbox
- Convenience / Prepared Produce
- Convenience Cleaning items
- Some Mexican and Italian-style meals

www.Mango.org

Source: FreshFacts® Shopper Insights powered by Spire and Spire's proprietary Essence™ shopper segmentation; 52 weeks ending 10/6/12

Definition of Babies & Kids segments

Sample Image	Description	Sample High-Index Products

Families with Babies

3 Essence segments: 1) Premium, 2) Young, 3) Value

- Households with Babies
- Likely 25-34 or 25-44 for higher income
- Range from purchasing Premium to Value
  - Premium families focus more on healthy eating and natural / organic
  - Non-Premium focus on quick meal solutions or heat-and-eat meals

- Baby Food / Formula / Care, skewing Organic for higher income
- HBC products, skewing Hispanic for lower income
- Kids Quick Meals, Yogurts, HBC, Breakfast

Kid-Focused Families

3 Essence segments: 1) Premium Healthy Kid-Focused, 2) Kid-Focused, 3) Value Kid-Focused

- Families with Children
- Likely to be 35-44
- Skews to single moms for lower income
- Skew heavily to kid-oriented products, indicating larger families with multiple kids or kid-focused smaller families
- Range from purchasing Premium to Value
  - Premium families tend to cook at home and skew to fresh / natural, with focus on healthy
  - Non-Premium focus on quick-cook meals and prepared foods

- Kids / Lunchbox items
- Baby food
- HBC
- Quick cook meals
- Family basics

Source: FreshFacts® Shopper Insights powered by Spire and Spire's proprietary Essence™ shopper segmentation; 52 weeks ending 10/6/12

Definition of Watching the Waistline segments

Sample Image	Description	Sample High-Index Products

Watching the Waistline Singles/Couples

3 Essence segments: 1) Finest Fresh, 2) Premium, 3) On-the-Go

- No Kids
- Likely 25-34 or 55-75+
- Skews female for highest income
- Actively watching calories and/or fat intake
- Prefer reduced fat/calorie products, health food and simple prepared meals
  - Some skew to on-the-go, quick-cook, supplements, and diet aids as well

- Reduced fat/calorie and light foods
- Quick meals and Deli-prepared foods
- Diet aids
- Supplements

Watching the Waistline Families

2 Essence segments: 1) Premium, 2) On-the-Go

- Families with Kids
- Likely 35-44, or 35-54 for higher income
- Higher- to Middle-Income
- Skews towards HH's with more females for higher-income
- Prefer simple meals and healthy snacks
  - Some purchase healthy products for kids also (e.g. lunchbox solutions, canned items, etc.)

- Reduced calorie/fat products
- Quick meals and Deli-prepared foods
- Diet aids
- Kids lunchbox

www.Mango.org

Source: FreshFacts® Shopper Insights powered by Spire and Spire's proprietary Essence™ shopper segmentation; 52 weeks ending 10/6/12

Definition of Meat & Potatoes segments

Sample Image	Description	Sample High-Index Products

Meat & Potatoes Couples

2 Essence segments: 1) Sunday Dinner, 2) Value Meat & Potatoes

- No Kids
- Skew to 65+
- Lower income
- Cook at home
    - No particular focus on health
- Some skew to value products while others don't skew to either premium or value

- Meat
- Grilling foods
- Soul foods

Meat & Potatoes Families

2 Essence segments: 1) Value Meat & Potatoes, 2) Meat & Potatoes

- Households with Kids
- Likely to be 25-44
- Lower- to Lowest income
- Skews to single moms for lowest income
- Cook at home
    - No particular focus on health
- Some skew to value products while others don't skew to either premium or value

- Meat
- Grilling foods
- Kids breakfast and indulgent items

Source: FreshFacts® Shopper Insights powered by Spire and Spire's proprietary Essence™ shopper segmentation; 52 weeks ending 10/6/12

Definition of Easy Meal segments

Sample Image	Description	Sample High-Index Products

Low-Cooking Singles

2 Essence segments: 1) Quick-Cooking, 2) Value Quick-Cooking

- Single households without kids
- 75+ for women; 55+ or < 34 for men
- Middle- to Lower-income
- Rely on easy meals / heat-and-eat
- Also skews to Tobacco and Beer / Wine / Liquor

- Quick cook meals & sides
- Tobacco
- Beer / Wine / Liquor
- Heat-and-Eat meals

Quick Cooking Families

2 Essence segments: 1) On-the-Go, 2) On-the-Go Value

- Households with kids
- Likely to be 25-34
- Middle- to Lower-income
- Rely on easy meal solutions
- Not focused on Health or Premium
- Purchase basics as well as kids breakfast / lunchbox items

- Quick cook meals & sides
- Quick baking
- Kids breakfast
- Toddler meals/diapers
- Sweet treats

Source: FreshFacts® Shopper Insights powered by Spire and Spire's proprietary Essence™ shopper segmentation; 52 weeks ending 10/6/12

Definition of Upscale segments

Sample Image	Description	Sample High-Index Products

Premium On-the-Go Couples & Families

2 Essence segments: 1) Couples, 2) Families

- Includes HH's with and without kids
- 55-75+ for couples, 35-54 for families
- Middle- income for couples, higher- for families
- Purchases higher-priced products
  - No particular focus on health
- Skews to prepared meals and indulgence
- Likely to own pets and purchase HBC items and home items in grocery

- Simple prepared meals
- Pet items
- Sweet treats
- Convenience cleaning products
- Deli- prepared foods & breads

Finest-Focused Couples and Families

2 Essence segments: 1) Singles/Couples, 2) Families

- Includes HH's with and without kids
- 55-75+ for couples, 35-44 for families
- Highest income bracket
- Ranges from highly premium to premium
  - No particular focus on health
- Couples skew towards premium for food as well as Beer / Wine / Liquor, Pet, & Non-food

- Simple prepared meals
- Premium priced products

Source: FreshFacts® Shopper Insights powered by Spire and Spire's proprietary Essence™ shopper segmentation; 52 weeks ending 10/6/12

Definition of Specialty segments

Sample Image	Description	Sample High-Index Products

Older Adults

3 Essence segments: 1) Healthy Living, 2) Quick Convenience, 3) Value

- No kids
- 65+ years of age
- Middle- to Lower Income
    - Premium HH's purchase HBC items for age
    - Non-Premium purchase functional health items and family basics

- Older adult products
- Diabetic/sugar-free products
- Yogurt for digestive health
- Canned foods
- Quick Cook and Heat-and-Eat meals

Natural/Organic Households

2 Essence segments: 1) Couples, 2) Families

- Includes HH's with and without kids
- Age ranges include 25-44 and 55-64
- Highest income bracket
- Skews to Organic as well as Indian/Asian, natural HBC, and eco-friendly non-food

- Organic milk, produce, and basics
- Indian & Asian foods
- Eco-friendly non-food
- Natural HBC
- Vegetarian foods
- Soy products
- Premium products with enhanced health benefits

Source: FreshFacts® Shopper Insights powered by Spire and Spire's proprietary Essence™ shopper segmentation; 52 weeks ending 10/6/12

Definition of Ethnic segments

Sample Image	Description	Sample High-Index Products

Hispanic Households

3 Essence segments: 1) Couples, 2) Young Families, 3) Kid-Focused Families

- Includes HH's with and without Kids
    - Kids HH's skew to quick meals, quick-cook and heat-and-eat meals
    - Non-Kids HH's skew also to meats, fish, grilling, and soul food.
- Likely to be 25-34 or < 25
- Skews to Hispanic as well as Value

- Hisp. Fresh / Frozen / SS Food & Bvg
- Ethnic HBC and Value HBC
- Caribbean foods
- Value-Kids- Breakfast, Yogurt, Quick Meals
- Value- Quick Cook / Heat-and-Eat

Kosher Households

2 Essence segments: 1) Couples, 2) Families

- Includes HH's with and without Kids
    - Kids HH's purchase healthy lunchbox snacks
- Higher income
- 55+ for couples and 35-44 for families
- Skews to Kosher as well as Healthy, Vegetarian, Organic, and Fish and/or Sushi

- Kosher foods
- Vegetarian / Organic
- Fresh fish

Source: FreshFacts® Shopper Insights powered by Spire and Spire's proprietary Essence™ shopper segmentation; 52 weeks ending 10/6/12

Essence™ top/bottom segments for mango

ShopperGroup Segments	Mango HH Penetration Among Segment	Mango Trips per HH	Mango Dollars per Trip	Mango Volume per Trip	% of Mango Sales	% of Store Sales	% of HH	Index of Mango to Store Sales
Top 10 Segments								
Natural & Organic Families	31.5%	2.8	$2.83	2.1	2.8%	2.3%	2.0%	119
Natural & Organic Couples	29.1%	2.7	$2.64	2.0	7.4%	5.7%	5.8%	131
Hispanic Young Families	28.1%	2.5	$3.08	2.6	5.8%	3.7%	4.1%	156
Hispanic Kid-Focused Families	24.8%	2.1	$3.05	2.6	0.3%	0.2%	0.2%	127
Hispanic Couples	24.4%	2.9	$2.92	2.4	7.5%	3.8%	5.0%	197
Premium Healthy Living Families	24.4%	2.4	$2.71	2.1	7.7%	8.1%	6.5%	94
Finest Fresh Foodie Couples	24.0%	2.5	$2.53	1.9	7.1%	6.3%	6.2%	113
Premium Families with Babies	21.9%	2.2	$2.77	2.1	0.8%	0.8%	0.7%	99
Premium Healthy-Living Couples	21.1%	2.3	$2.53	2.0	13.2%	12.6%	12.5%	105
Finest-Focused Families	17.4%	2.3	$2.69	2.0	2.4%	2.4%	2.2%	100
Bottom 10 Segments								
Finest-Focused Singles/Couples	9.2%	1.7	$2.35	1.8	1.2%	1.5%	1.7%	80
On-the-Go Quick-Cooking Families	8.9%	1.6	$2.45	2.0	2.7%	4.5%	3.9%	61
Value Kid-Focused Families	8.1%	1.6	$2.62	2.2	0.2%	0.3%	0.3%	73
Kid-Focused Families	7.8%	1.6	$2.54	2.0	0.6%	1.2%	0.8%	52
On-the-Go Watching the Waistline	7.3%	1.8	$2.33	1.9	1.1%	1.2%	1.4%	87
Value Older Adults	7.1%	1.9	$2.42	2.0	0.2%	0.2%	0.2%	105
Sunday Dinner Couples	7.1%	1.6	$1.37	1.5	0.4%	0.8%	1.0%	51
Value Meat & Potatoes Couples	6.6%	1.6	$2.40	2.0	0.5%	0.6%	0.7%	87
Value Quick-Cooking Singles	6.4%	1.5	$2.32	1.9	1.0%	1.3%	1.5%	75
Quick-Cooking Singles	6.0%	1.5	$2.33	1.9	1.3%	1.9%	2.1%	69

Source: FreshFacts® Shopper Insights powered by Spire and Spire's proprietary Essence™ shopper segmentation; 52 weeks ending 10/6/12