

# National Mango Board: Mango Benchmark Study

52 Weeks Ending October 6, 2012



**FRESHFACTS<sup>®</sup>**  
SHOPPER INSIGHTS  
POWERED BY **Spire**



# 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

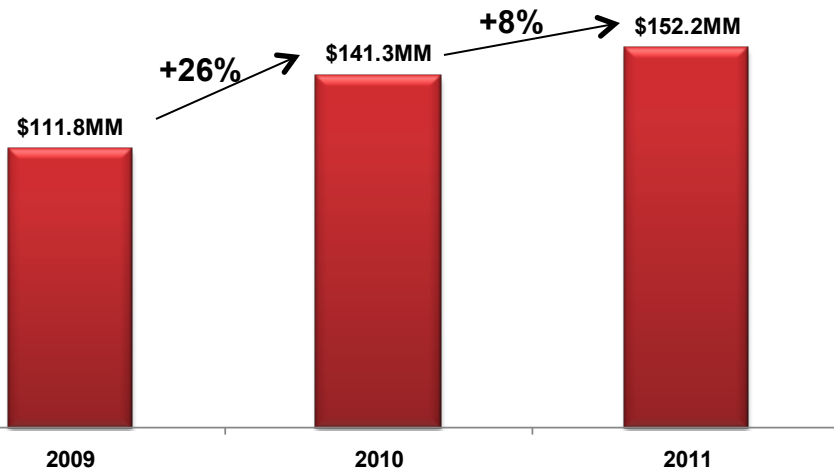
**Understand the impact of heavy buyers:**

73% of mango dollar sales from heavy buyers

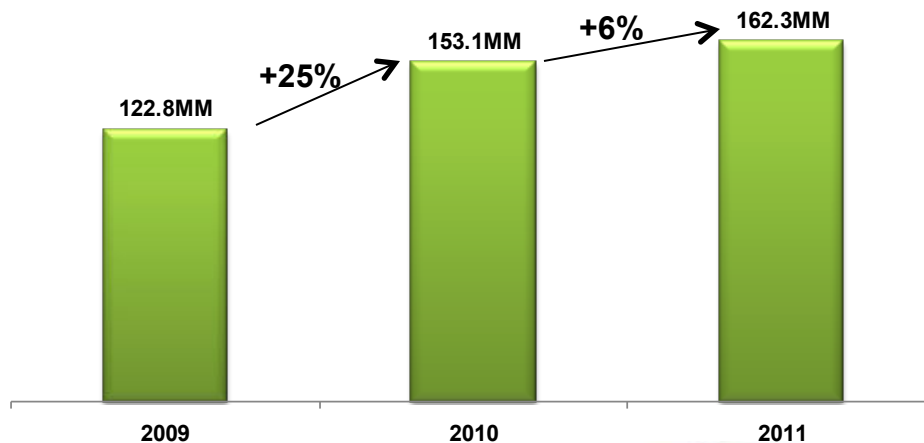
# Mango sales continuously increased over the past three years

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

**Mangos Dollar Trend (in Millions)  
Total U.S.**

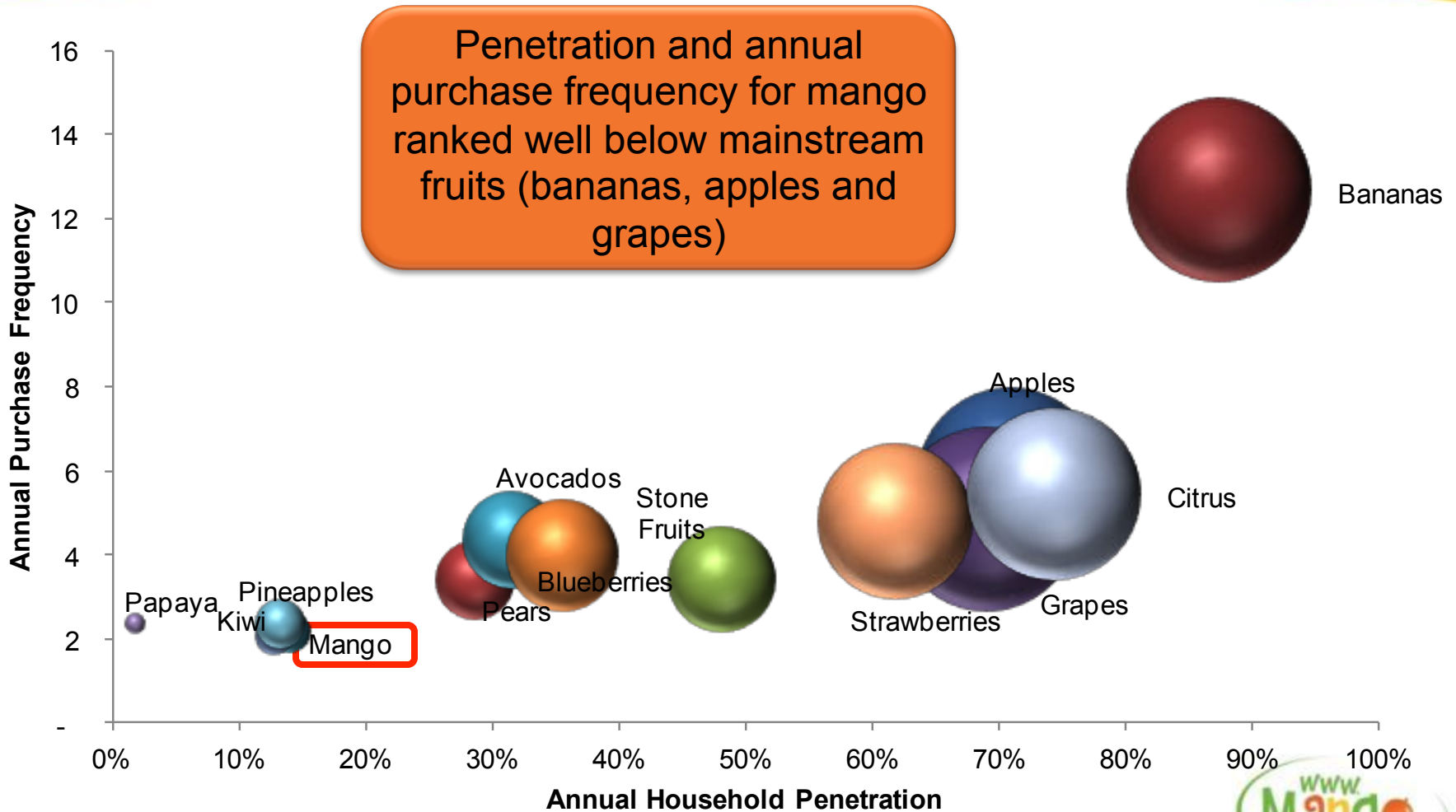


**Mangos Volume Trend (in Millions)  
Total U.S.**



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



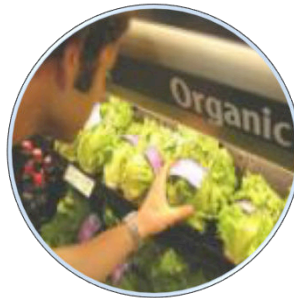
# Mango sales driven by foodies, natural/organic and Hispanic households

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



Strawberries

• 5.4 times more likely



Pears

• 7.8 times more likely



Herb and Spices

• 5.2 times more likely



Stone Fruits

• 7.2 times more likely



Squash/Pumpkins

• 4.9 times more likely



Other Berries

• 6.1 times more likely



Citrus

• 4.8 times more likely



Blueberries

• 6.0 times more likely



Corn

• 4.3 times more likely



# 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





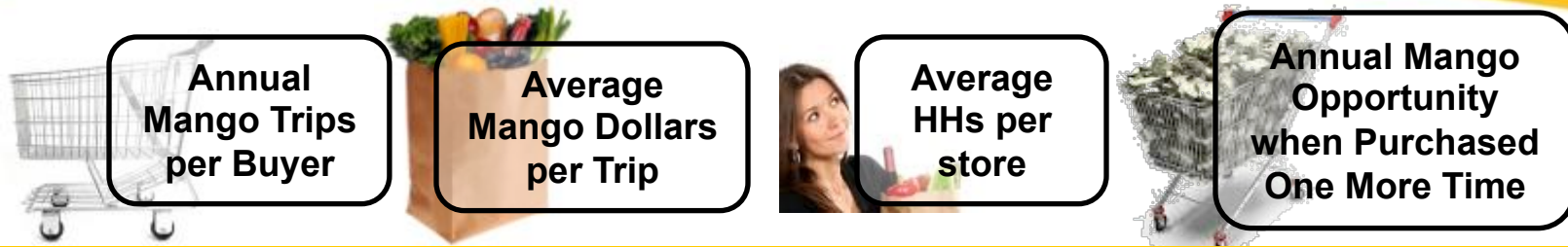
# Heavy mango buyers drove mango sales by purchasing more often

- 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



# 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
<b>Heavy</b>	3.9	\$3.09	126	\$391 per store
<b>Medium</b>	1.4	\$2.20	126	\$278 per store
<b>Light</b>	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



# 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**