

THE EXPONENTIAL POWER OF COLLABORATIVE MARKETING



Agenda

Clarification of Misconceptions:

- **No new grower assessments.**
- Industry wide initiative.
- Supporting ALL fresh apples grown in the US

- Fresh Apple Data and Trends
- Consumer Insights
- Consumption Campaign
- How you can help
- Q+A Panel

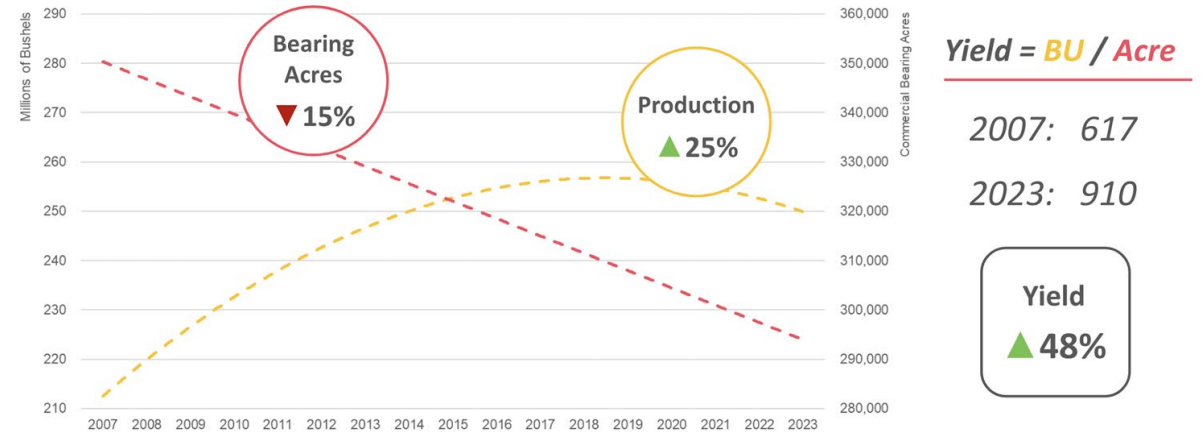


Domestic Apple Grower Challenges

- Oversupply.
- Declining export demand.

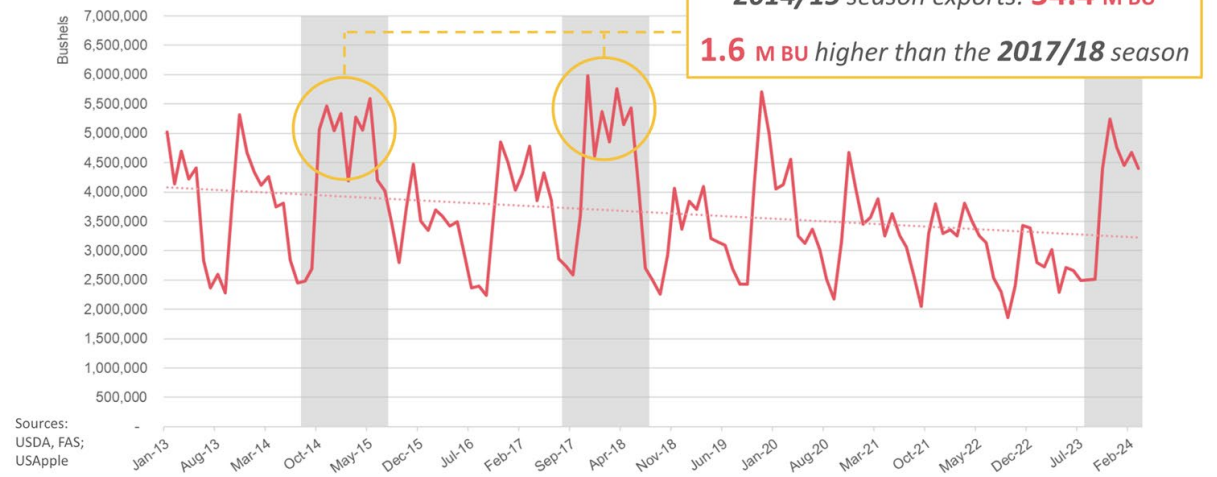
★ Static to declining consumption in the US market.

U.S. Apple Yield



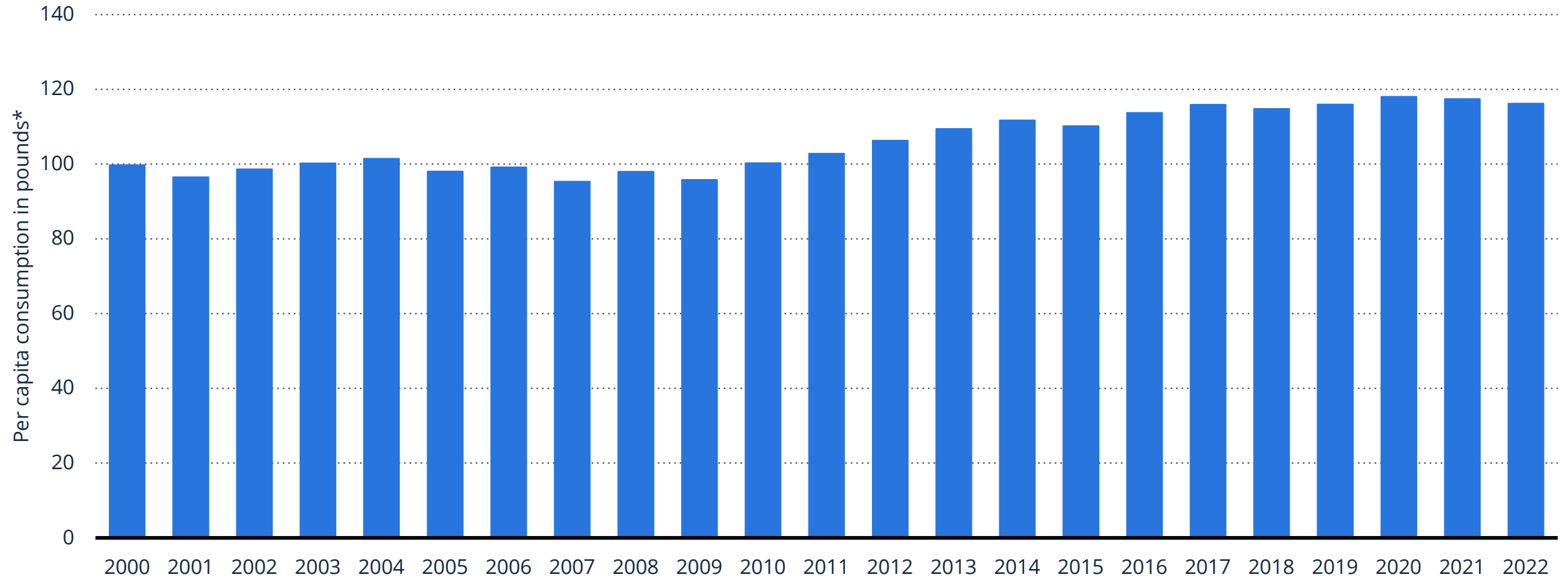
Sources: USDA, NASS; USApple

U.S. Fresh Apple Exports



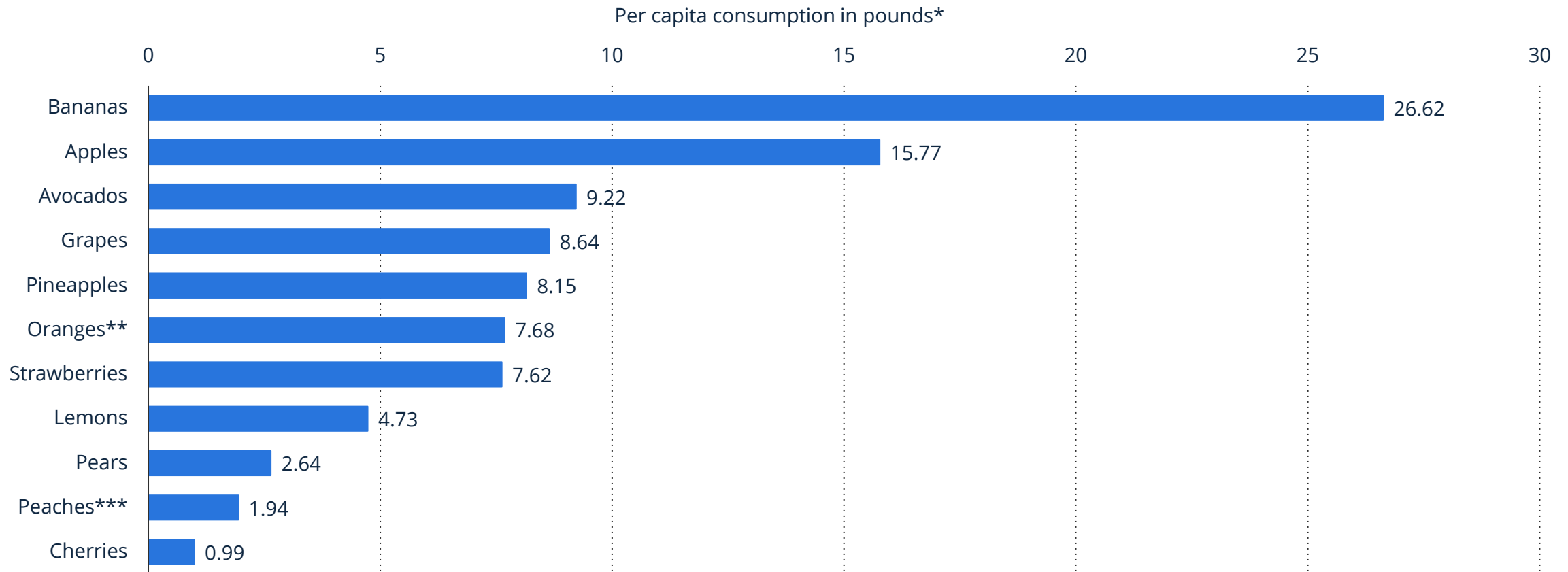
Sources: USDA, FAS; USApple

Per Capita Consumption of Fresh Fruit in The United States From 2000 to 2022 (in pounds)



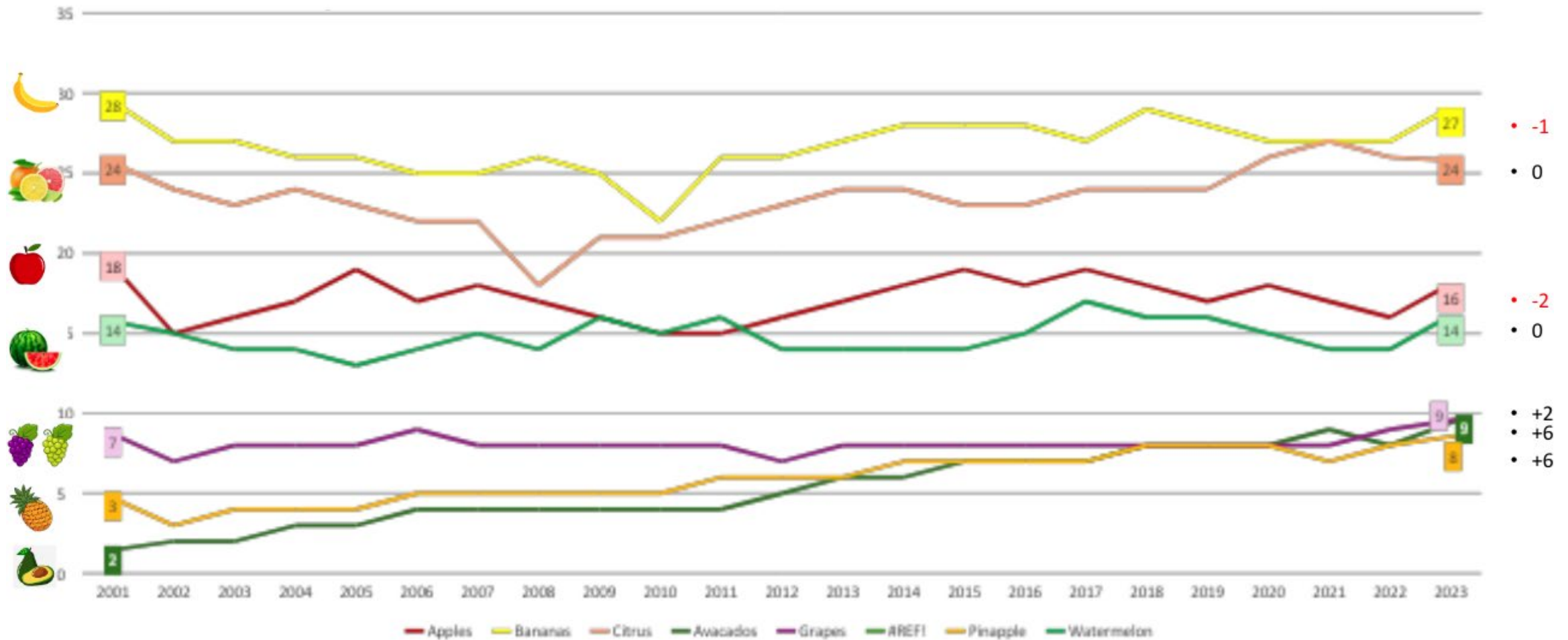
Description: The timeline shows the per capita consumption of fresh fruit in the United States from 2000 to 2022. Americans consumed about 116.21 pounds of fresh fruit per capita in 2022. According to the Agricultural Marketing Resource Center, the most commonly consumed fresh fruits in the U.S. are: bananas, apples, oranges, grapes and strawberries. Read more | **Note(s):** United States; 2000 to 2022; * Based on farm weight and the U.S. resident population plus the Armed Forces overseas. According to ERS the data are proxies for consumption. Consumption normally represents total supply minus exports, [...] Read more | **Source(s):** Economic Research Service; US Department of Agriculture

Per Capita Consumption of Fresh Fruit in The United States In 2022, By Selected Fruit Type (in pounds)



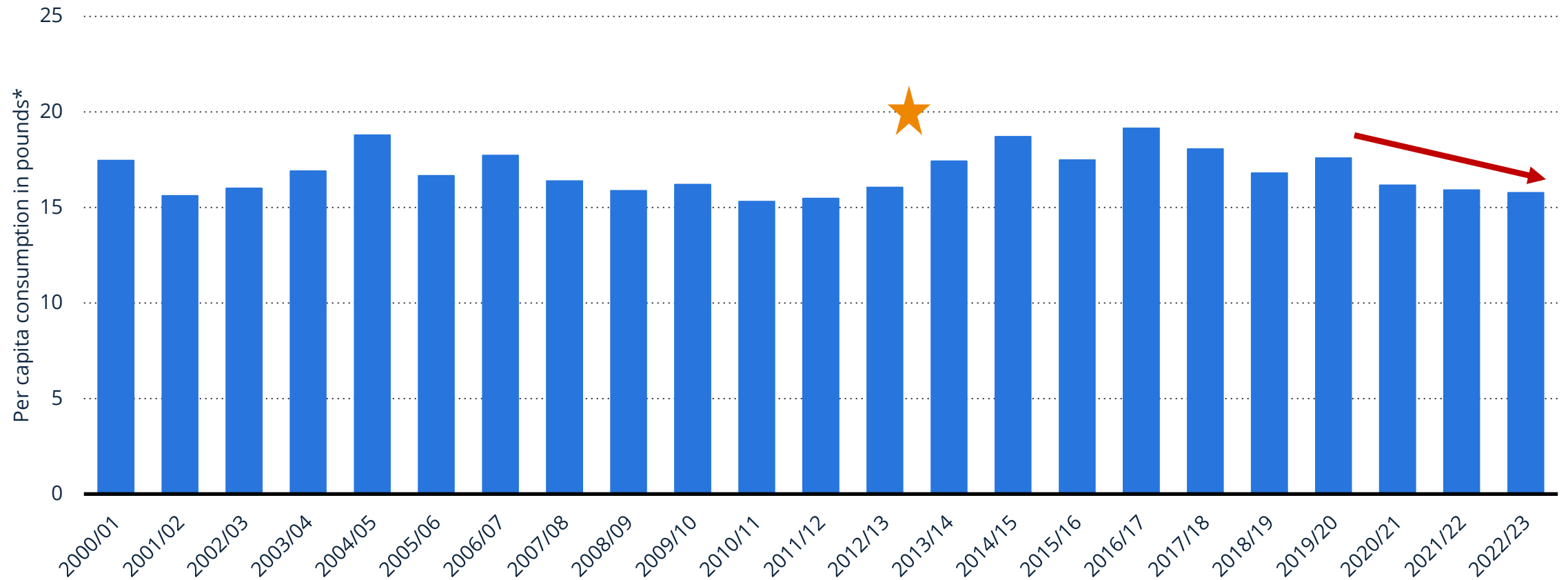
Description: This statistic highlights the per capita consumption of fresh fruit in the United States in 2022, by single fruit type. Bananas and apples were the leading fruit types in the U.S. in 2022, based on per capita consumption. The per capita consumption of fresh apples amounted to approximately 15.77 pounds that year. Americans consumed cherries the least out of these selected fruits in 2022. Read more | **Note(s):** United States; 2022; * Based on retail weight. According to ERS the data are proxies for consumption. Consumption normally represents total supply minus exports, nonfood use, and ending stocks. **Oranges includes oranges and [...] Read more | **Source(s):** Economic Research Service; US Department of Agriculture

Per Capita Consumption of Fresh Fruit in the United States From 2001 to 2023 (in pounds)



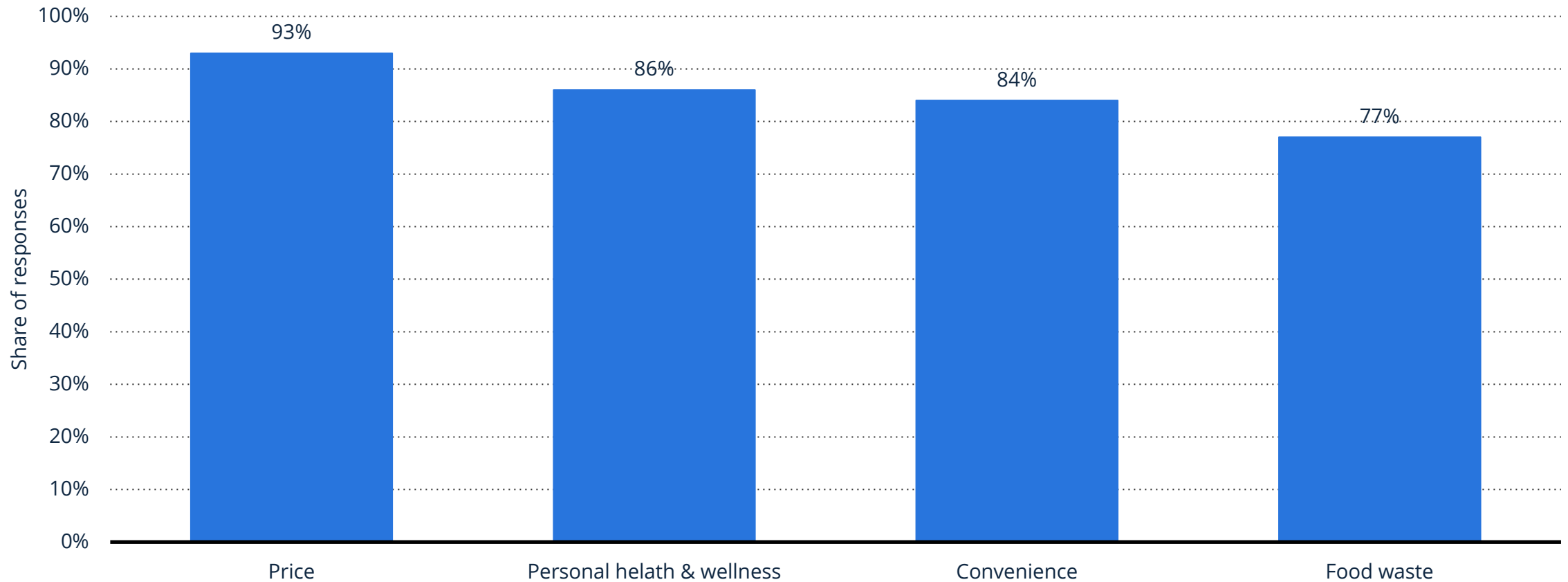
Description: In 2024, about 39 percent of respondents in the United States that the term "fresh" best defines healthy food to them. This was the most frequently chosen definition. The term "low in sugar" was the third most frequently chosen definition for healthy foods, with nearly 37 percent of respondents choosing this definition. Read more | Note(s): United States; March 23 to April 4, 2024; 3,000 respondents; 18-80 years | Source(s): Greenwald & Associates; IFIC

Per Capita Consumption of Fresh Apples in the United States From 2000/01 to 2022/23 (in pounds)



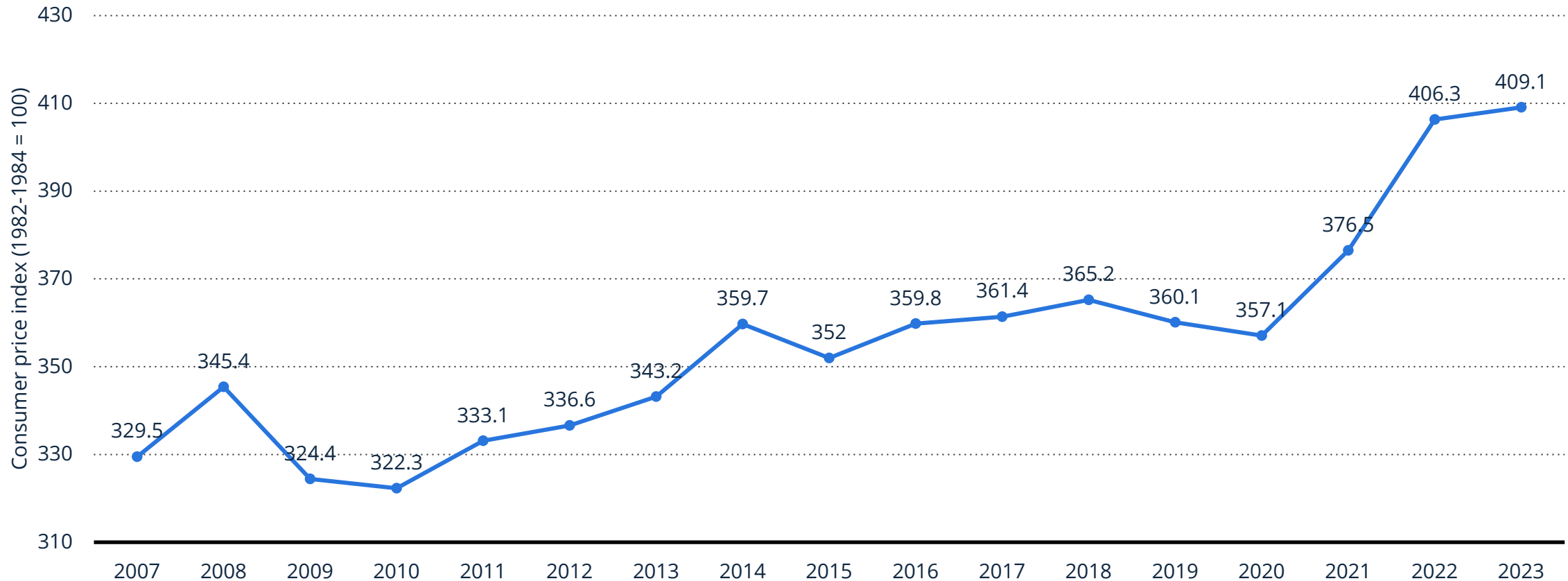
Description: Apples and bananas are the most consumed fresh fruit per capita by American consumers. Since 2000, the per capita consumption of fresh apples has fluctuated between about 15 and 19 pounds per consumer each year. In 2022/23, 15.77 pounds of fresh apples were consumed per consumer. [Read more](#) | **Note(s):** United States; 2000/01 to 2022/23; *Based on retail weight. All per capita consumption figures are calculated using resident population plus the Armed Forces overseas. Data are conducted on a crop-year basis beginning in the year indicated. [Read more](#) | **Source(s):** Economic Research Service; US Department of Agriculture

Drivers of Fresh Food Consumption Among Consumers in the U.S. in 2023



Description: In the U.S., 93 percent of consumers reported that price was a driver for purchasing fresh food. Consumers also commonly reported that personal health and wellness was an important driver for fresh food purchases that year. [Read more](#) | **Note(s):** United States; July 2023; 2,000*; *The source used a survey approach that was designed to approximate US census demographics. [Read more](#) | **Source(s):** Deloitte

Consumer price index for fresh fruit in the United States from 2007 - 2023

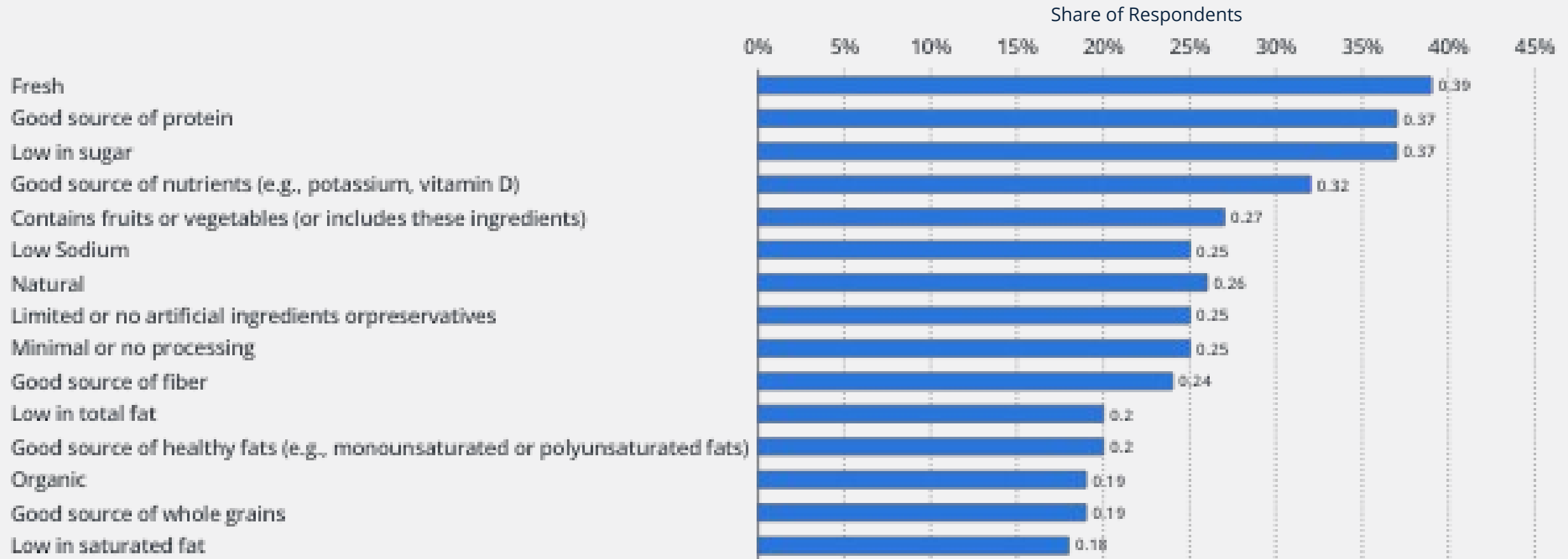


Description: This statistic illustrates the consumer price index for fresh fruit in the United States from 2007 to 2023 using the prices over the period 1982-1984 (=100) as a base. In 2023, the CPI for fresh fruit stood at an average of 409.1, up from 406.3 in the previous year. [Read more](#)

Note(s): United States; 2007 to 2023; * Annual averages. All urban consumers, U.S. city average. [Read more](#)

Source(s): Economic Research Service; US Department of Agriculture

Consumers' Definitions of Healthy Food in the United States in 2024



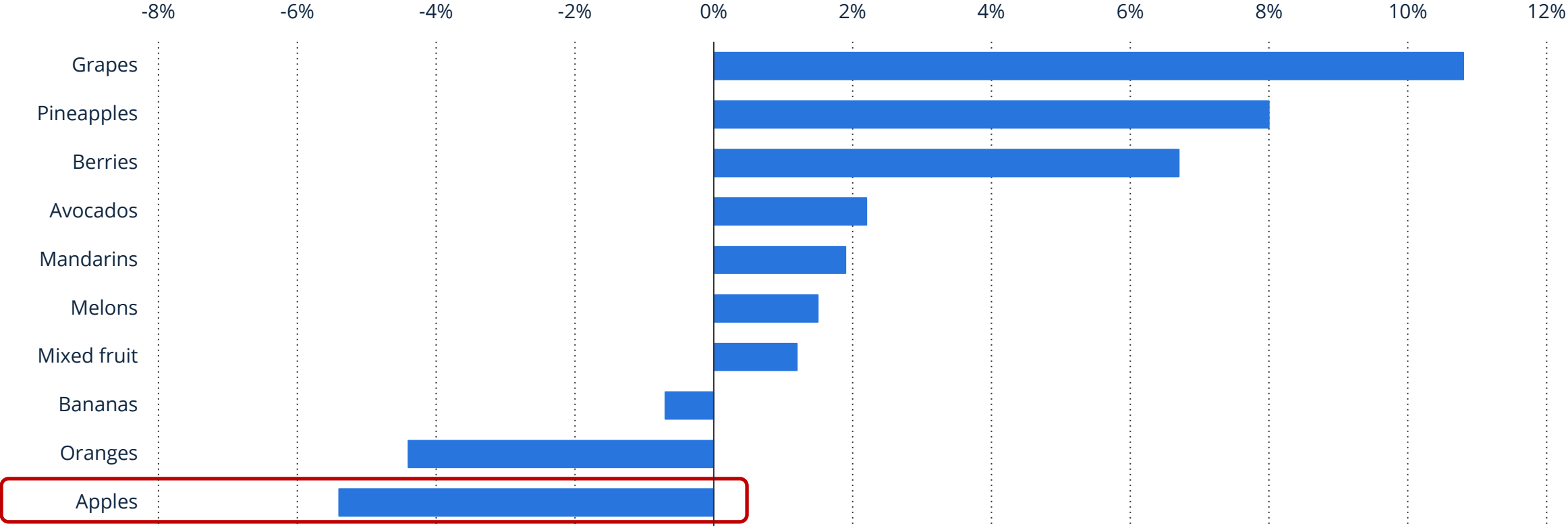
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Note(s): United States; March 23 to April 4, 2024; 3,000 respondents; 18-80 years | **Source(s):** Greenwald & Associates; IFIC

What is happening at retail?



Sales Growth of Fresh Fruit in the United States in 2023, By Type



Description: This statistic shows the sales growth of fresh fruit in the United States in 2023, broken down by type. In that year, U.S. sales of grapes increased by approximately 10.8 percent compare to the previous year. Read more | Note(s): United States; 52 weeks ended on December 2023 | Source(s): International Fresh Produce Association

What are the trends impacting customer engagement?

- A 2020 study on produce consumption by Produce for Better Health found that produce consumption in the US has declined by 10% over the last 18 years.
- This study also showed that Apples remain the 2nd most consumed fruit but is the 6th most declining fruit.
- The apple category is losing in eating occasions, while Bananas, Grapes, Blueberries, Strawberries and Oranges are increasing.

TOP FRUITS CONSUMED BY FREQUENCY

Annual eating occasions per capita

1	Bananas, 41.9
2	Apples, 28.2
3	Strawberries, 13.7
4	Oranges, 12.8
5	Grapes, 12.6
6	Blueberries, 11.7
7	Applesauce, 7.3
8	Watermelon, 5.8
9	Lemons, 5.7
10	Fruit salad, 4.9
11	Peaches, 4.7
12	Pineapple, 4.3

TOP FRUITS CONSUMED BY VOLUME

Average cups per occasion

1	Melons, 2
2	Apples, 1.3
3	Peaches, 1.2
4	Citrus, 0.9
5	Bananas, 0.9
6	Applesauce, 0.7
7	Berries, 0.7
8	Grapes, 0.6
9	Dried fruit, 0.5
10	Single/mixed nuts, 0.4

TOP GROWING FRUITS

Annual eating occasions per capita change, 2015-2020

1	Bananas, +2.3
2	Grapes, +1.9
3	Blueberries, +1.8
4	Strawberries, +0.9
5	Oranges, +0.7

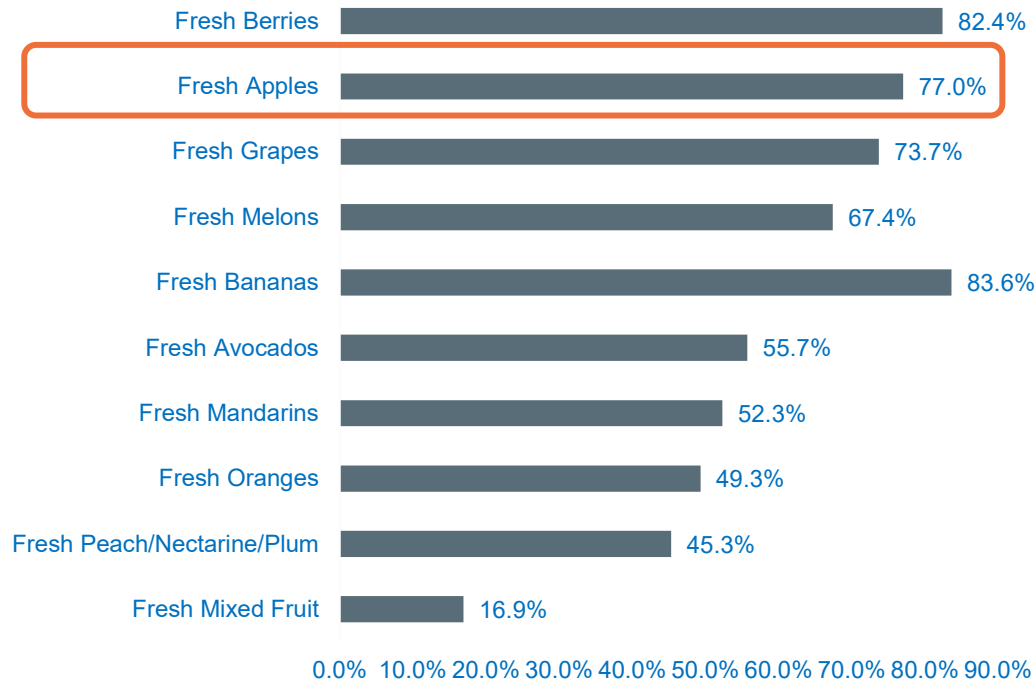
TOP DECLINING FRUITS

Annual eating occasions per capita change, 2015-2020

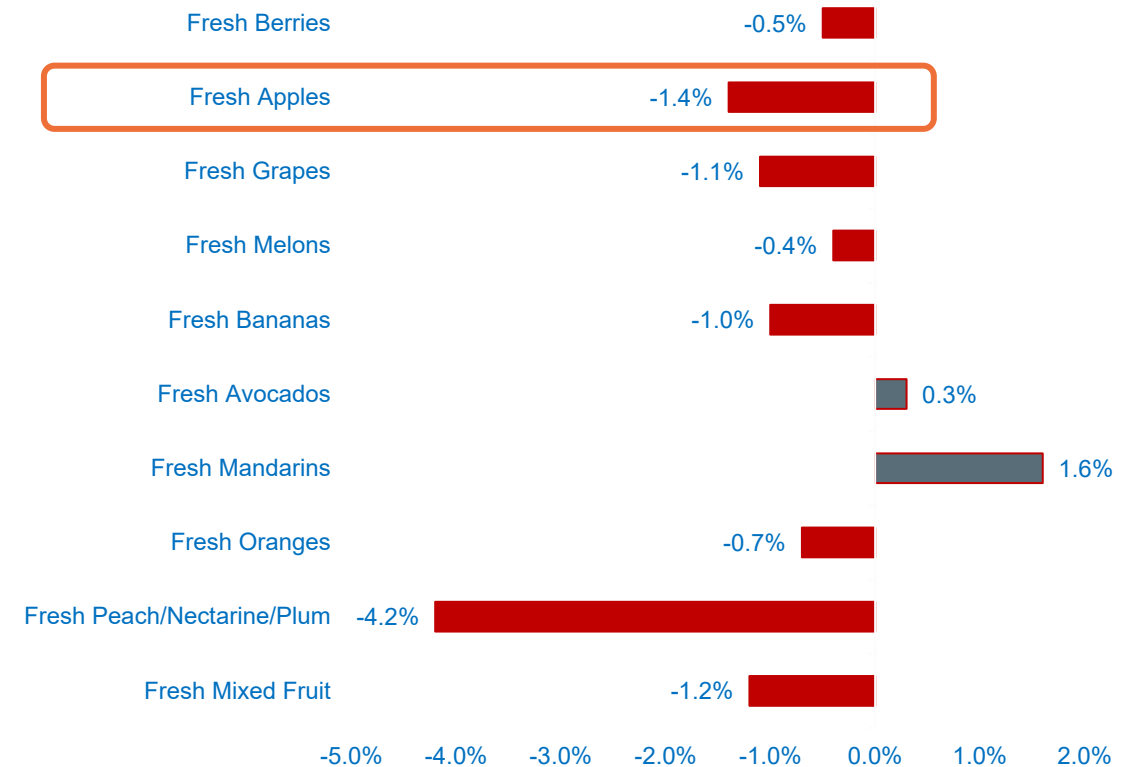
1	Raisins, -1.3
2	Mixed Fruits, -0.8
3	Peaches, -0.8
4	Cantaloupe, -0.6
5	Pineapple, -0.5
6	Apples, -0.2

Household Buying Trends on Fresh Produce

Top Selling Aisle Fresh Fruit by % HH Buying



Top Selling Aisle Fresh Fruit by % HH Buying



331 mil

Total US population

131 mil

Total US HH

100.87 mil

Total US HH purchasing
apples

30.13 mil

Total US HH NOT purchasing
apples

1.8 mil

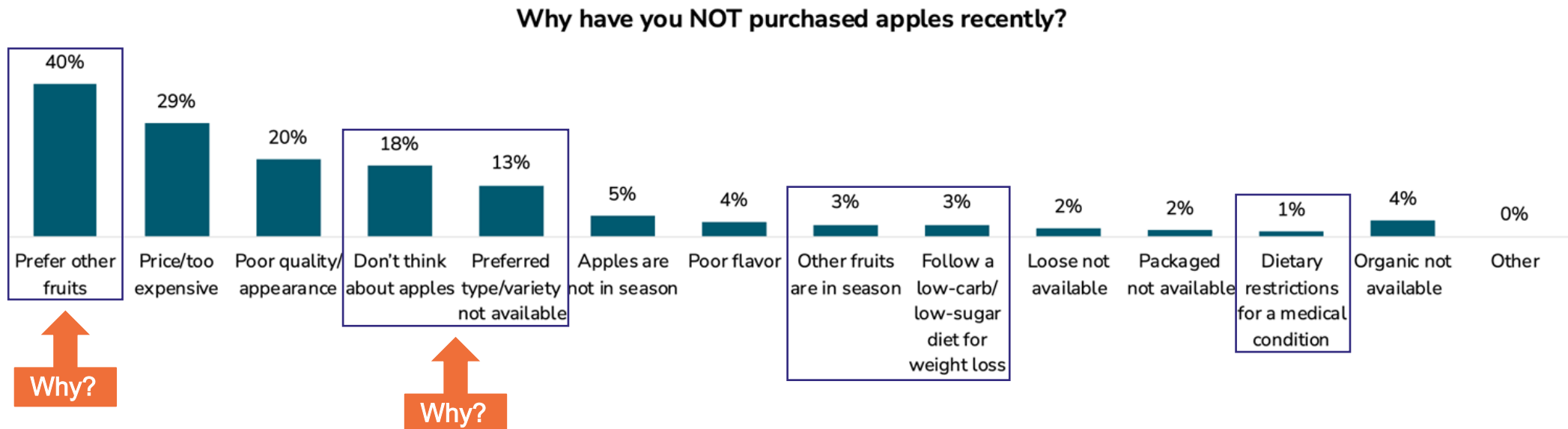
Total US HH we lost YOY

Why Apple Consumers Walk Away

Consumers who had not purchased apples in more than one month said they prefer other fruits, apples are too expensive, or the quality is poor.

Another **18%** of consumers said they do not think about apples.

Additionally, **13%** have not purchased apples in a few months or more because their preferred variety was not available.



The 2024 Dirty Dozen™

Of the 46 items included in our analysis, these 12 fruits and vegetables were the most contaminated with pesticides.



Strawberries

The average American eats about eight pounds of fresh strawberries a year – and with them, dozens of pesticides, including chemicals that have been linked to cancer and reproductive damage, or that are banned in Europe.

[LEARN MORE](#)

02

Spinach

Spinach is packed with nutrients – but also EU-banned pesticides

03

Kale, collard & mustard greens

More than half of kale samples tainted by possibly cancer-causing pesticide

04

Grapes

05

Peaches

Peaches pack a punch when it comes to pesticide contamination

06

Pears

Pears among the most pesticide-contaminated fruit in EWG's Dirty Dozen™

07

Nectarines

08

Apples

Apples doused with chemical after harvest

09

Bell and hot peppers

10

Cherries



11

Blueberries

Blueberries back on the Dirty Dozen™, with traces of several toxic pesticides

12

Green beans

Green beans join the Dirty Dozen™, tainted by a pesticide EPA banned over 10 years ago

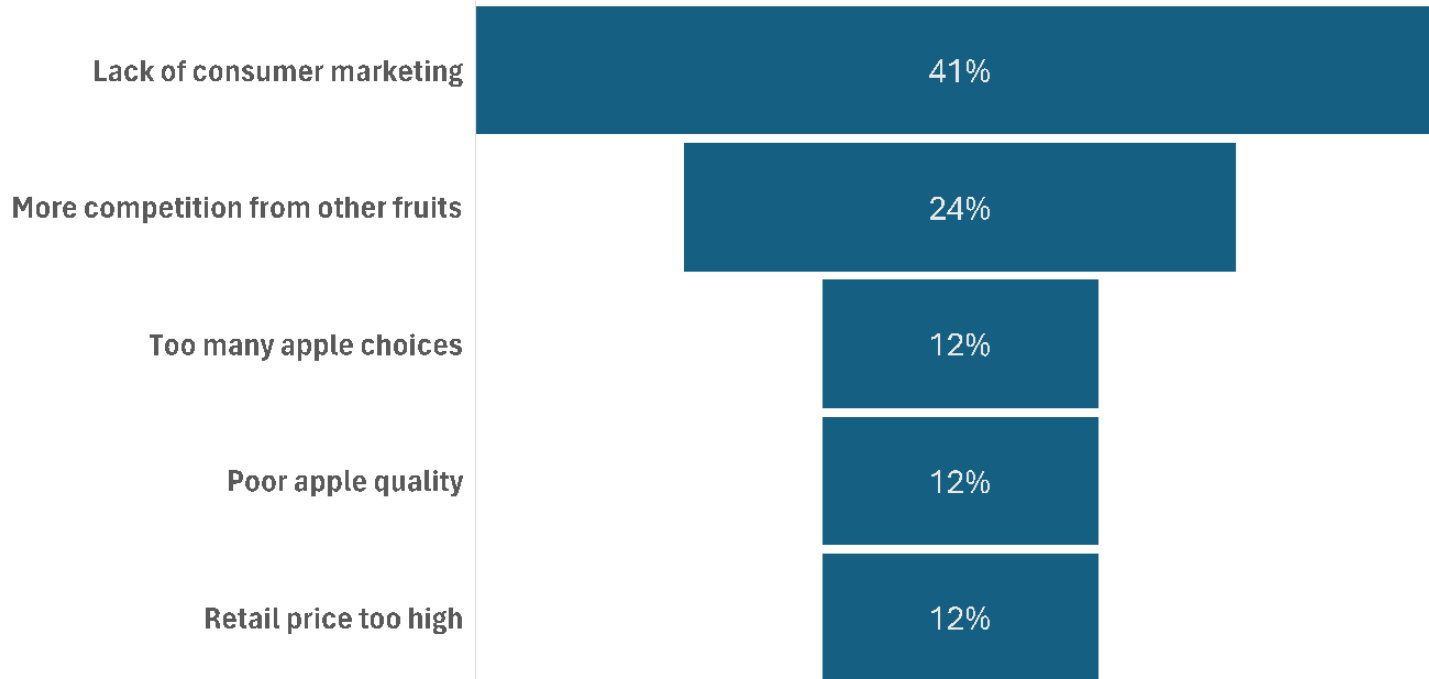


Apples are yummy
unless they've been
cursed. Warning: Do
not eat talking food.



Apple Survey: Growers

What do you think is causing the fresh apple consumption decline in the US Market?



Assortment

- Too many new apples crowding the shelf.
- Slew of varieties causing exhaustion on the part of consumers.

Marketing

- Lack of unified marketing message.
- Better marketing of competitive fruits – keeping their program top of mind for shoppers.
- No focus on nutritional benefits of eating fresh apples.

Quality

- Poor quality – too green for long-term storage, not fresh packed, sizing is too large, more bruised apple with low color in market today

Retail

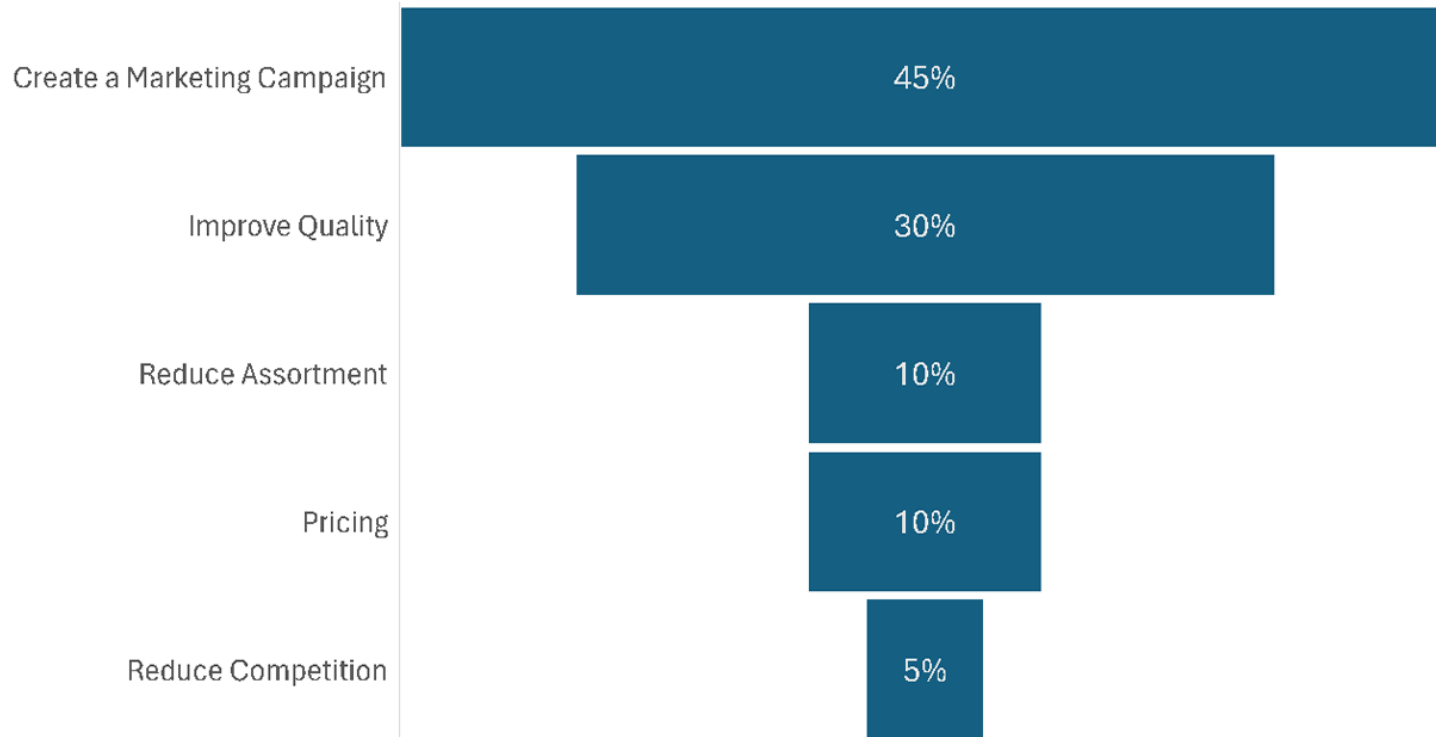
- Retail inflation/gouging – they are operating off of higher margins.
- Poor shelf experience – empty shelves due to labor?

Competitive Fruit/Products

- Better alternative and more exotic fruit in marketplace.
- Growing number of prepackaged snack options.

Apple Survey: Growers

What would you do to increase fresh apple consumption in the US Market?



Marketing

- Bring back “An Apple a Day”.
- Find effective ways to ensure consumers of all ages think of fresh apples for snacks and meals – they are convenient, healthy and delicious.
- Better information in stores about club varieties- signage to differentiate with story on how they came to fruition.
- Clever packaging to entice children to ask for apples.

Quality

- Improve flavor and texture.
- Stricter specifications for pressure, color and size.
- Remove Red Delicious from the market.
- Stop McIntosh after March
- Pick fruit for flavor vs storage.
- Clamp down on quality control for bagged apples.

Assortment

- Clean out non-performing varieties
- Eliminate Red Delicious, Cortland and McIntosh

Pricing

- Stop the high/low pricing strategies where the high prices fund the low discounts.
- Retailers need to lower their prices

Reduce Competition

- Put tariffs in place – all of the other countries do it.

Apple Consumption Program Overview



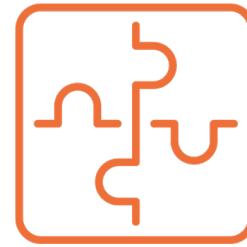
Goal

Collaborative consumer marketing campaign focused on driving fresh apple consumption in the domestic market.



Funding

No additional grower lift.
Explore grants, private sector and secondary partner investments.



Tactics

Consumer Insights Led + Shopper Targeted
Paid Digital, Social Media, Influencer partners
Retail Platform
Activations – no “pay to play” features or ads.

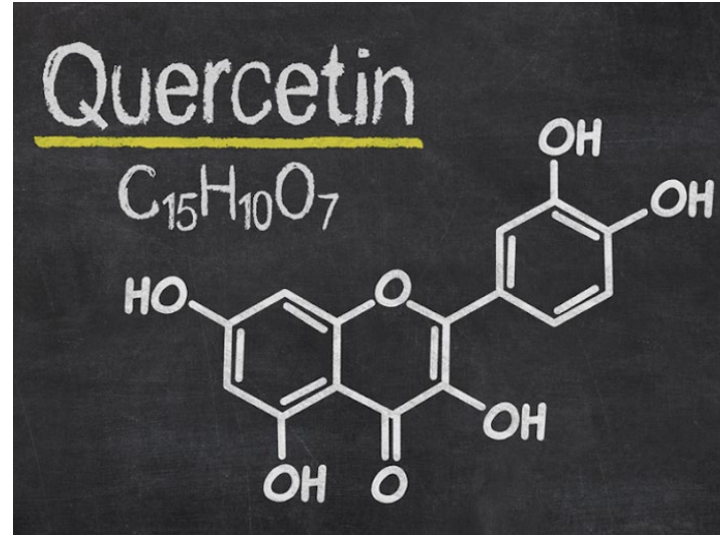


Key Messages: Wellness



Fiber = Gut Health

Soluble and Insoluble Fiber
5 grams of fiber/20% daily value
Improve Digestion
Lower Cholesterol
Weight Management



Phytonutrients

Found in Skin
Mood Boosting – Dopamine Release
Fight Degenerative Brain Disease
Sharpness
Improve Blood Flow



Hydration & Recovery

Natural Source of Clean Energy
Extended Hydration: 85% water
Blood Sugar Control (Low Glycemic)
Prebiotic - More Gut Health!
Boosts Metabolism
Vitamin C and Magnesium

Apple Consumption Team Committees

1. Industry Partnerships
2. Shopper Insights
3. Objective and KPIs
4. Wellness
5. Quality
6. Retail Partnerships
7. Funding
8. Sustainability

- Fortune 500 companies with ESG initiatives.
- Health Care System – Insurance + Providers
- Public Health Institutes – FDA, CDC, etc.
- Private/Non-Profit Health – AHA, ADA, etc.
- Private Sector
- State Health Education + Nutrition Initiatives
- Universities with Tree Fruit Programs
- Field + Warehouse Suppliers
 - Materials – Simplot, Wilber Ellis, GS Long
 - Equipment – John Deere, New Holland, CA
 - Packaging – Compac, MAFF, CHEP, IFCO
 - Processors – TreeTop, CrunchPak
 - Insurance

How can you help?

Show your support

Sign the “Letter of Support”

Share your logo as a partner of the campaign.

Share the message.

