



# Mushroom Council

## Fresh Mushroom Tracker Highlights

Data through 5/19/2019

### Spotlight – Notable and Newsworthy

- **In the 4-weeks** – Specialty and value added mushrooms show significant sales gains
- **In the 52-weeks** – Mushroom category growth rate outpaced Total Produce

#### Total Mushrooms – 4 Weeks

- Fresh mushroom volume saw a softening in the market in the latest four weeks (-5.5%), but an increase of +1.9% in Average Selling Price (ASP) helped restrict a decline in dollar sales (-3.7%)
- Total Produce dollar sales also declined (-2.8%)
- The softening in the category was shown across all regions and dollar trends ranged from -8.0% in Plains to -1.4% in Southeast
  - Ten markets showed an increase in dollar sales, led by Chicago at +12.9%
- Organic and Conventional mushrooms also showed softer sales trends across most regions, but Plains and West showed significant increases in Organic dollar sales and volume
  - Plains Organic dollars increased +10.5% and volume increased +28.2%
  - West Organic dollars increased +17.8% and volume increased +14.3%

#### Segment/Variety – 4 Weeks

- White mushrooms held the largest share of fresh mushroom volume (63%) and dollars (58%) and were the primary driver behind sales trends in the latest four weeks
  - As the largest mushroom segment, white mushroom sales trends softened this period. Total U.S. white mushroom volume declined -7.4%, but an increase in ASP helped restrict a decline in dollar sales (-5.1%)
- Cremini mushrooms made up 29% of total dollar sales and showed flat dollar sales growth, while portabella mushrooms made up 6% of total dollar sales and declined -19.1%
- Specialty and value added mushrooms both showed strong sales growth in the four-week period
  - Dollar sales grew +4.8% and +16.8%, respectively
  - Volume grew +5.2% and +36.7%, respectively

#### Total Mushrooms – 52 Weeks

- 52-week mushroom category dollar sales increased +2.0%, driven by a +1.0% increase in volume (lbs.), and an +0.8% increase in ASP
- Mushroom dollar growth rate outpaced Total Produce by +0.5 points and translated to +\$25.9M in incremental sales for the 52-week period
  - All regions except Plains contributed to dollar growth for the 52-week period. West led the regions at +4.7%
- Organics held a 14% share of category dollars, but drove 23% of dollar growth. Organics held a slightly smaller share of volume (12%), but drove 34% of volume growth
  - Conventional still controlled most of the category with an 86% share of dollar sales and +\$19.9M in incremental sales

#### Segment/Variety – 52 Weeks

- Brown mushrooms drove 45% (+\$11.6M) of dollar gains for the year, despite a smaller relative share of total dollar sales (34%) vs. white mushrooms (58%)
  - Cremini mushrooms were the primary driver behind brown mushroom growth (+4.4% in dollars) and added +\$15.6M in incremental sales
    - Portabella dollar sales declined -5.3% and volume declined -6.6%
- White mushrooms, with the largest share of category dollars (58%), also contributed significant dollar growth to the category (+\$3.8M)
- Specialty mushrooms made up 5% of total dollar sales and increased +10.8% (+\$6.5M), which accounted for 25% of category dollar gains
- Value added mushroom dollar sales also grew by double-digits (+16.7%), led by a +65.6% increase in Northeast and a +41.5% increase in Great Lakes