



# Getting to Know Fresh Mushroom Consumers



Presented by:

Cristie Mather | Curious Plot

Jonna Parker | IRI

Anne-Marie Roerink | 210 Analytics



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## Produce is a major anchor for total store success

Mushroom baskets are more valuable

Fresh departments' share to total fresh perimeter



**Fresh produce is a sales powerhouse:**

- 10%-15% of total store \$ sales

**Fresh produce is a trip magnet:**

Top trip drivers are bakery and produce

- 55% of trips include produce
- 41.1 trips/year

**Importantly:**

When mushrooms are in the basket, the total ring averages \$92.77

Source: IRI, Household Panel data, All outlets, mushrooms, 52 weeks ending 6/12/2022

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## The total ring is highest for crimini baskets

Specialty is mostly lower as it tends to be a meal/recipe not stock-up trip



**\$92.77**

Total ring if mushrooms are purchased



**\$92.53**

If crimini/brown mushrooms are purchased



**\$105.98**

If crimini mushrooms are purchased; Portabella = \$89.85



If specialty mushrooms are purchased:

- **Shiitake: \$99.98**
- **Oyster: \$85.37**
- **Enoki: \$75.94**
- **Random weight: \$72.33**

Source: IRI, Household Panel data, All outlets, mushrooms, 52 weeks ending 6/12/2022

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## 52% of American households buy fresh mushrooms

That means lots of opportunity for growth

### Mushroom shopping trends

Household penetration



**52.1%**

**Or 63.4 million buying households**

Trips/year



**7.3x**

**Or 63 days between purchases**

Spend/trip



**\$3.07**

Annual \$/buyer



**\$22.42**

Source: IRI, Household Panel data, All outlets, mushrooms, 52 weeks ending 6/12/2022

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Understanding what else mushroom consumers purchase can help drive that extra trip or dollar

- Methodology

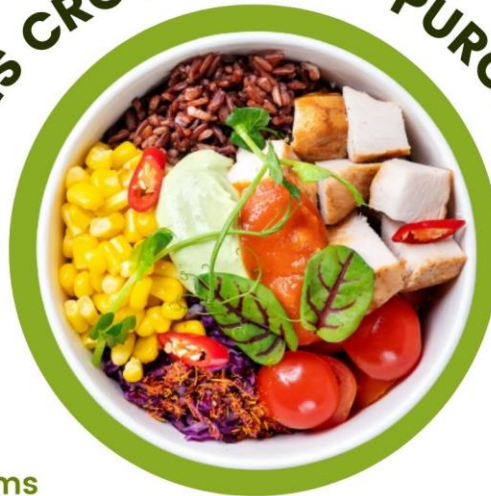
- Cross- and co-purchase analysis
- IRI multi-outlet universe
- 52 weeks ending June 12, 2022
  - Excludes heavy lock-down and grocery stock up from early pandemic
- Category, sub-category and segment level insights



## WHAT IS CROSS- & CO-PURCHASING

**CROSS**

Household who purchase mushrooms also buy...



**CO**

When mushrooms are bought, what else is in the basket

## How to use?



### Data-based decision making in:

- Cross-merchandising
- Cross-promoting
- Cross-advertising
- Recipe development
- Meal deal development
- Also-buy suggestions in online baskets
- Etc.

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### Total mushrooms

#### Co-purchase analysis



#### Category level (examples)

Source: IRI, Integrated Fresh, MULO, 52 weeks ending 6/12/2022



Fresh cooking  
root &  
cruciferous  
vegetables



Fresh salad  
vegetables,  
salads and  
leafy greens



Deli specialty  
cheese



Chicken, esp.  
breast and  
thighs



Shelf-stable  
pasta



Tomato  
products  
and frozen  
vegetables



Olives,  
pickles and  
relish



Natural  
cheese  
dairy



Beef,  
including  
steak and  
ground



Eggs

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## How to use?

On mushroom labels and merchandising



Specialty mushrooms with deli cheese



Relevant mixed veg with mushrooms



Suggested addition of fresh mushrooms

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## Total mushrooms

Co-purchase analysis



Sub-category level

Other fresh vegetables most frequently included in the same basket when any type of fresh mushrooms are purchased.



Fresh onions  
White, yellow, red and scallions



Fresh peppers  
Bell peppers and mini peppers



Tomatoes  
Bulk, packaged grape & cherry tomatoes



Cucumbers

Other top  
Fresh produce

- Squash
  - Broccoli
  - Carrots
  - Spinach
  - Lettuce
- Avocados
  - Potatoes
  - Berries
  - Celery
  - Refrigerated salad dressing

## How to use?

### On mushroom labels and merchandising



Common cross-purchase items on veggie kabobs



BBQ bundles with common co-purchases

#### AH Salade BBQ pakket

per pakket

9.71 **9.14**

Voeg toe +

Niets relaxer dan samen barbecuën in de zon. Heb jij ook moeite met kiezen wat je nu echt nodig hebt? Relax! Wij doen alvast een voorzet met onze verschillende BBQ-pakketten.

“ Nothing more relaxing than grilling out together. Are you struggling with what you need? Relax! We make it easy with our variety of BBQ bundles.”

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## Total mushrooms

### Co-purchase analysis



#### Sub-category level

Meat items most frequently included in the same basket when any type of fresh mushrooms are purchased.

Source: IRI, Integrated Fresh, MULO, 52 weeks ending 6/12/2022



Chicken  
Breast and thighs



Steak  
Ribeye, New York strip, Filet Mignon



Bacon  
Packaged bacon



Ground beef  
All lean levels  
And pork dinner sausage



Lunch meats  
Ham and turkey

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## How to use?

### On mushroom labels and merchandising

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Highlight the mushroom opportunity in grilling

DELIVERING THE WORLD'S FRESHEST PRODUCE

#### Mushrooms on permanent menu at Jersey Mike's Subs

May 2, 2022 - General News

Print Email Facebook Twitter Plus



Grilled Portabella Mushroom and Swiss Sub

MANASQUAN, N.J. — What's your number? #64! After a year-long try out, Jersey Mike's Subs assigns an official number—64—to its Grilled Portabella Mushroom and Swiss Sub, awarding the popular meatless option a coveted place on the permanent menu board.

The sub, introduced in February 2021, features fresh grilled Portabella mushrooms, green peppers and onions with melted Swiss cheese. The Grilled Portabella Mushroom and Swiss Sub was named *best healthy fast-food sandwich* in the 2022 *Eat This, Not That!* Food Awards.

Ideate around mushrooms on subs



Suggestive selling in the ad

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## How to use?

### On mushroom labels and merchandising

● ● ●



Co-merchandise marinated/seasoned mushrooms in the full-service meat counter



Sausage-stuffed mushrooms, with a cross-purchase index of Italian sausage and mushrooms of 122

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## Total mushrooms

### Co-purchase analysis



### Sub-category level

Dairy items most frequently included in the same basket when any type of fresh mushrooms are purchased.

Source: IRI, Integrated Fresh, MULO, 52 weeks ending 6/12/2022



Shredded cheese  
All types



Eggs  
All types



Sour cream  
Plus high co-purchase with yogurt



Sliced and blocks of cheese



Butter

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With today's inflation in dairy, especially eggs, mushrooms can be a budget hero

### Q2 average price per unit vs. Q2 2021



Cheese:  
\$3.76 | +10.5%



Eggs:  
\$4.30 | +52.8%



Sour cream:  
\$2.47 | +18.4%

Yogurt:  
\$2.42 | +21.6%



Butter/margarine:  
\$4.31 | +29.2%



Source: IRI, Integrated Fresh, MULO, 13 weeks ending 9/25/2022

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## Total mushrooms

### Co-purchase analysis



### Sub-category level

Center store items most frequently included in the same basket when any type of fresh mushrooms are purchased.

Source: IRI, Integrated Fresh, MUJO, 52 weeks ending 6/12/2022



Broth/stock



Spaghetti sauce



Canned tomatoes



Olives



Spices, beyond salt/pepper



Pasta, esp. long noodles



Tortillas/flatbreads and center-store bread



Salad dressing

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## How to use?

### On mushroom labels and merchandising



Icons to highlight popular applications



Others also bought suggestions

### Knorr Maaltijdmix spaghetti bolognese

90 g Normale prijs per KG € 19,44

vanaf maandag

1.75

Voeg toe +

### Anderen kochten ook



Grand Italia Spaghetti all'uovo  
vrij zondag



1.99



1.99



5.25

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## Sub-category co-purchase summary with combined ranks (popularity and index)

1-25	Combined Score
FRESH ONIONS	11
FRESH PEPPERS	14
FRESH TOMATOES	18
FRESH CUCUMBERS	22
FRESH SQUASH	24
FRESH BROCCOLI	25
FRESH CARROTS	25
FRESH SPINACH	27
FRESH LETTUCE	30
FRESH AVOCADOS	31
FRESH POTATOES	32
FRESH BERRIES	34
FRESH CELERY	40
FRESH APPLES	47
DAIRY NATURAL SHREDDED CHEESE	52
SHELF-STABLE WET BROTH/STOCK	56
CHICKEN BREAST	56
FRESH BANANAS	63
FRESH EGGS	66
FRESH CAULIFLOWER	69
DAIRY SOUR CREAM	71
DAIRY NATURAL SLICES CHEESE	71
CANNED & BOTTLED TOMATOES	72
FRESH GRAPES	72
DAIRY BUTTER	73

26-46	Combined Score
DAIRY NATURAL BLOCKS/CHUNKS CHEESE	74
FRESH SALADS-BLENDS	76
SPICE/SEASONING - NO SALT/PEPPER	76
DAIRY YOGURT	77
DAIRY WHIPPED TOPPINGS	79
BEEF STEAK	79
HARD/SOFT TORTILLAS/TACO KITS	80
CENTER STORE SANDWICH BREAD	84
FRESH BEANS	85
DAIRY RFG ALTERNATIVE MILK	85
SHELF-STABLE SPAGHETTI/ITALIAN SAUCE	85
DAIRY REFRIGERATED MILK	87
DELI SALADS LETTUCE-BASED	89
OLIVES	89
DAIRY CREAM CHEESE	89
BACON	90
GROUND BEEF	93
SHELF-STABLE LONG PASTA	97
COTTAGE CHEESE	100
SHELF-STABLE POURABLE SALAD DRESSINGS	101
CRACKERS	101
FRESH CABBAGE	102

\* The lower the score the higher the popularity and co-purchase index

Source: IRI, Integrated Fresh, MULO, 52 weeks ending 6/12/2022

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## Category cross-purchase summary; household penetration of $\geq 10\%$



1-25	% Households buying	% Buyer overlap	Cross- purchase index
REFR. MEAT ALTERNATIVES	10.0	13.4	135
CENTER STORE WRAPS/FLATBREADS	18.9	24.2	128
FRESH HERBS	35.8	45.7	126
FROZEN MEAT/SEAFOOD ALTERNATIVES	15.6	19.5	126
FRESH FINFISH	41.5	51.3	124
DELI REFR. PICKLES/RELISH/OLIVES	23.2	26.5	123
FRESH REFR. SALAD DRESSINGS	23.2	28.6	123
REFR. TORTILLA/EGG ROLL WRAPS	14.0	17.2	123
RANDOM WEIGHT SAUSAGE	13.3	16.2	122
FRESH TORTILLAS/WRAPS/FLATBREADS	18.2	22.2	122
FRESH SHELLFISH	37.5	45.2	121
FROZEN PASTA	24.1	28.9	120
DELI PRE-SLICED CHEESE	28.2	33.7	120
DELI PRE-SLICED LUNCHEAT	25.3	30.2	119
DRY BEANS/VEGETABLES	44.5	52.2	118
FRESH CRUCIFEROUS VEGETABLES	69.4	81.9	118
COTTAGE CHEESE	43.6	51.2	117
DELI SIDE DISHES	35.0	41.0	117
DELI GRAB & GO CHEESE	34.6	40.6	117
BAKING NUTS	41.9	49.1	117
PERIMETER BAGELS/BIALYS	23.1	26.7	116
BAKING SYRUP/MOLASSES	14.4	16.7	116
FROZEN JUICES	13.5	15.7	116
ASIAN FOOD	64.4	74.2	115

26-34	% Households buying	% Buyer overlap	Cross- purchase index
FROZEN JUICES	13.5	15.7	116
ASIAN FOOD	64.4	74.2	115
FROZEN FRUIT	38.6	44.4	115
CENTER STORE ENGLISH MUFFINS	39.6	45.4	115
FRESH MIXED VEGETABLES	32.7	37.4	115
DRIED FRUIT	53.4	61.1	115
COCKTAIL MIXES	18.1	20.7	115
REFR. WHIPPED TOPPINGS	59.6	68.1	115
SHELF-STABLE PIZZA PRODUCTS	22.7	25.9	115

Excludes "all other" categories, such as all other vegetables

Source: IRI, Integrated Fresh, MULO, 52 weeks ending 6/12/2022

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## Total mushrooms

Cross-purchase analysis

Sub-category level

Items frequently purchased by mushroom households with household penetration of at least 10% or more. Excluding "all other" subcategories.



Plant-based meat alternatives



Wraps, tortillas flatbreads (center store and fresh)



Fresh herbs



Frozen plant-based meat alternatives



Fresh finfish



Deli olives/pickles/relish



Refrigerated salad dressing



Refr. Eggroll/springroll wraps



Italian sausage



Fresh shellfish



(Frozen) pasta



Deli cheese



Deli meat



Dried beans



Cruciferous vegetables

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Source: IRI, Integrated Fresh, MULO, 52 weeks ending 6/12/2022

## Segment cross-purchase summary; household penetration of $\geq 10\%$

Excludes "all other" categories, such as all other chicken

1-25	% Households buying	% Buyer overlap	Cross-purchase index	26-50	% Households buying	% Buyer overlap	Cross-purchase index
FRESH ASPARAGUS	18.8	27.9	149	FRESH KIWIS	13.3	17.1	129
FRESH EGGPLANT	11.2	16.1	144	FRESH SALMON	30.2	38.7	128
DELI SPECIALTY GOUDA	10.0	13.8	142	WHOLE COFFEE BEANS	12.0	15.4	128
FRESH PEAS	15.1	21.2	140	FRESH SQUASH	48.8	62.3	128
FRESH BRUSSELS SPROUTS	17.7	24.8	140	FRESH GARLIC	22.2	28.3	127
DELI SPECIALTY GOAT	11.4	15.7	137	FRESH SALADS-SLAW	20.9	26.6	127
ASIAN COOKING OILS	10.4	14.3	137	GROUND CHICKEN	10.5	13.3	127
FRESH RADISHES	17.1	23.4	137	FRESH SPINACH	48.2	61.2	127
DELI SPECIALTY BRIE	10.6	14.4	136	DELI SIDE DISHES PASTA	23.6	29.7	126
FRESH CAULIFLOWER	29.6	40.1	135	DRY/REFR. YEAST	15.4	19.4	126
FRESH BASIL	11.3	15.3	135	DELI SPECIALTY PARMESAN	22.9	28.7	126
FRESH KALE	11.7	15.8	134	RFG LIQUID EGGS	10.0	12.6	125
DELI SPECIALTY FETA	21.1	28.2	134	FRESH GRAPEFRUIT	14.0	17.5	125
READY TO DRINK COCONUT MILK	15.2	20.1	133	DRIED CRANBERRIES	16.1	20.0	125
CANNED/BOTTLED MUSHROOMS	18.7	24.7	132	FROZEN PEAS	30.2	37.5	124
FRESH COOKING GREENS	16.0	21.1	132	DELI SPECIALTY MOZZARELLA	12.3	15.2	124
DELI SPECIALTY RICOTTA	14.3	18.7	131	FROZEN RAW SHRIMP	38.2	47.3	124
CHICKEN DINNER SAUSAGE	14.5	19.0	131	FRESH SWEET POTATOES/YAMS	16.4	20.2	124
MARINATED VEGETABLE/FRUIT	22.8	29.8	131	FRESH BROCCOLI	51.9	64.1	124
FRESH CILANTRO	16.4	21.4	130	DELI HUMMUS	32.4	40.0	124
FROZEN MEAT ALTERNATIVES	12.9	16.7	130	FRESH PEARS	28.2	34.8	123
FROZEN SPINACH	17.4	22.4	129	REFR. PIZZA CRUST DOUGH	10.3	12.6	123
FRESH BEANS	32.9	42.4	129	REFR. SALAD DRESSINGS	23.2	28.6	123
CENTER STORE PITA	10.2	13.2	129	RW GRAB & GO CHEDDAR CHEESE	11.3	13.9	123
DELI SPECIALTY FRESH MOZZARELLA	18.3	23.5	129	DAIRY ALTERNATIVE YOGURT	10.6	13.0	123



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## White segment cross-purchase summary; household penetration of $\geq 10\%$

Excludes "all other" categories, such as all other chicken



1-25	% Households buying	% Buyer overlap	Cross- purchase index	26-50	% Households buying	% Buyer overlap	Cross- purchase index
FRESH ASPARAGUS	18.8	29.6	158	FRESH GARLIC	22.2	28.8	129
FRESH BRUSSELS SPROUTS	17.7	25.6	145	FRESH KIWIS	13.3	17.2	129
FRESH PEAS	15.1	21.5	142	FRESH SQUASH	48.8	63.0	129
CANNED/BOTTLED MUSHROOMS	18.7	26.5	142	REFRIGERATED PIZZA CRUST DOUGH	10.3	13.2	129
FRESH EGGPLANT	11.2	15.8	142	FROZEN PEAS	30.2	38.9	129
FRESH RADISHES	17.1	24.1	141	GROUND CHICKEN	10.5	13.5	129
FRESH CAULIFLOWER	29.6	41.3	139	FRESH SPINACH	48.2	61.9	129
DELI SPECIALTY RICOTTA	14.3	19.8	139	FROZEN RAVIOLI	12.9	16.6	128
ASIAN COOKING OILS	10.4	14.4	138	FROZEN MEAT ALTERNATIVES	12.9	16.5	128
FRESH KALE	11.7	16.1	137	DRIED CRANBERRIES	16.1	20.6	128
FRESH BASIL	11.3	15.5	137	FRESH COOKING GREENS	16.0	20.5	128
DELI SPECIALTY FETA	21.1	28.9	137	FRESH SALMON	30.2	38.5	128
DELI SPECIALTY GOAT	11.4	15.6	136	SS FISH/SEAFOOD	19.5	24.8	127
FROZEN SPINACH	17.4	23.5	135	DELI SIDE DISHES PASTA	23.6	29.9	127
DELI SPECIALTY BRIE	10.6	14.2	135	FROZEN RAW SHRIMP	38.2	48.5	127
FRESH CILANTRO	16.4	22.0	134	WHOLE COFFEE BEANS	12.0	15.2	126
READY TO DRINK COCONUT MILK	15.2	20.3	134	DELI SPECIALTY MOZZARELLA	12.3	15.5	126
FRESH SALADS-SLAW	20.9	27.8	133	DELI SPECIALTY PARMESAN	22.9	28.7	126
MARINATED VEGETABLE/FRUIT	22.8	30.3	133	OLIVES	45.7	57.4	125
CANNED/BOTTLED SAUERKRAUT	13.7	18.2	132	REFR. LIQUID EGGS	10.0	12.6	125
CHICKEN DINNER SAUSAGE	14.5	19.1	132	FRESH PEARS	28.2	35.2	125
CENTER STORE PITA	10.2	13.5	132	SHELF-STABLE NOODLES	38.2	47.7	125
DELI SPECIALTY FRESH MOZZARELLA	18.3	24.0	131	FRESH SWEET POTATOES/YAMS	16.4	20.4	125
FRESH BEANS	32.9	42.7	130	DELI SALADS LETTUCE BASED	34.1	42.4	125
DRY/RFG YEAST	15.4	20.0	130	FRESH BROCCOLI	51.9	64.6	125

## Crimini segment cross-purchase summary; household penetration of $\geq 10\%$

Excludes "all other" categories, such as all other chicken



1-25	% Households buying	% Buyer overlap	Cross- purchase index	26-50	% Households buying	% Buyer overlap	Cross- purchase index
FRESH ASPARAGUS	18.8	31.8	170	CENTER STORE PITA	10.2	14.4	141
FRESH KALE	11.7	19.3	164	DELI SPECIALTY PARMESAN	22.9	32.1	140
FRESH BRUSSELS SPROUTS	17.7	28.9	163	DELI SPECIALTY MOZZARELLA	12.3	17.2	140
DELI SPECIALTY GOAT CHEESE	11.4	18.7	163	FRESH SALMON	30.2	42.0	139
FRESH BASIL	11.3	18.0	159	DELI SIDE DISHES PASTA	23.6	32.8	139
ASIAN COOKING OILS	10.4	16.6	159	DAIRY ALTERNATIVE ICE CREAM	12.1	16.8	139
FRESH EGGPLANT	11.2	17.7	158	FRESH GARLIC	22.2	30.8	138
DELI SPECIALTY BRIE	10.6	16.7	158	FRESH SWEET POTATOES/YAMS	16.4	22.6	138
FRESH PEAS	15.1	23.3	154	PERIMETER NAAN	12.2	16.9	138
READY TO DRINK COCONUT MILK	15.2	23.3	154	FROZEN SPINACH	17.4	23.9	137
CHICKEN DINNER SAUSAGE	14.5	21.9	151	DELI HUMMUS	32.4	44.4	137
FROZEN MEAT ALTERNATIVES	12.9	19.4	151	DELI PRE-SLICED HAM	10.8	14.8	137
DELI SPECIALTY FETA	21.1	31.8	151	DRY/RFG YEAST	15.4	21.0	136
FRESH CILANTRO	16.4	24.1	147	FRESH BEANS	32.9	44.7	136
DELI SPECIALTY FRESH MOZZARELLA	18.3	26.6	146	RW GRAB & GO CHEDDAR CHEESE	11.3	15.4	136
FRESH KIWIS	13.3	19.3	145	REFR. PIZZA CRUST DOUGH	10.3	13.9	135
FRESH RADISHES	17.1	24.8	145	FRESH SPINACH	48.2	64.9	135
WHOLE COFFEE BEANS	12.0	17.4	145	FRESH SALADS-SLAW	20.9	27.8	133
FRESH COOKING GREENS	16.0	23.1	145	TONIC WATER/CLUB SODA	12.5	16.6	133
DAIRY ALTERNATIVE YOGURT	10.6	15.3	144	FRESH SQUASH	48.8	64.8	133
DELI SPECIALTY RICOTTA	14.3	20.5	144	FRESH LEMONS	24.6	32.6	133
FRESH CAULIFLOWER	29.6	42.4	143	DRIED CRANBERRIES	16.1	21.3	132
GROUND CHICKEN	10.5	15.0	143	REFR. SALAD DRESSINGS	23.2	30.6	132
MARINATED VEGETABLE/FRUIT	22.8	32.5	142	FROZEN PEAS	30.2	39.8	132
REFR. LIQUID EGGS	10.0	14.2	141	GROUND TURKEY	29.8	38.9	131



## How to use?

### On mushroom labels and merchandising



Co-merchandise fresh herbs and mushrooms with a cross-purchase index of 159 for fresh basil



Provide recipes surrounding items mushroom household tend to buy, including a vegetarian/vegan option



Align vegetable mixes with popular cross-purchase items, including asparagus, at 170


## In summary: Fresh mushroom consumers are foodies



- Foodies, liking specialty varieties across categories, such as fresh herbs, lamb (though still <10%) and specialty cheese
  - Foodie nature is enhanced for crimini
- Over index for the use of frozen meat, poultry and seafood; fruits and vegetables and other frozen offerings
- Over index for purchasing plant-based alternatives, including meat, chicken, yogurt and cheese (not milk)
- Over index for deli cheese and meat (vs. pre-packaged dairy)

## However...Not all mushroom consumers are equal

56% of light buyers only purchased fresh mushrooms once. Heavy buyers are foodies

		Annual spend	Annual trips	Days between trips
	<b>Heavy</b> 33%	<b>\$56</b> Or 75% of sales	<b>17.0</b>	<b>33</b>
	<b>Medium</b> 33%	<b>\$14</b> Or 19% of sales	<b>5.2</b>	<b>77</b>
	<b>Light</b> 34%	<b>\$4.50</b> Or 6% of sales	<b>2.0</b>	<b>102</b>



Source: IRI, Household Panel data, All outlets, mushrooms, 52 weeks ending 8/6/2021

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## Comparing segments: a frequency opportunity

Spend per trip across segments is nearly even, it's the number of trips that defines the segments

### Penetration leaking across all:

- Heavy, Medium and Light all saw fewer qualifying buyers in L52 vs YA

### Amount Spent per Trip Similar

- Averages show about 1 unit each trip
- Only heavy buyers buy every 33 days vs. light every 102+ days

### Getting in the Cart More Often is Key:

- 56% of Light Buyers only purchased Mushrooms once

Source: IRI Household Panel Integrated Fresh, Custom HML Study for Mushroom Council, data ending 6-12-22

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## A frequency play = a \$75M opportunity

Spend per trip across segments is nearly even, it's the number of trips that defines the segments

### Mushrooms are mostly a stock-up trip item

- When buyers purchase mushrooms, they all average about \$92-94 in total

### Similar year-over-year change

- All 3 groups saw average trip spend on mushrooms decline slightly
- Annual spent on the category increased slightly but with penetration down, sales has a net loss
- Indicating price/quantity/value equation is considered by all

### Opportunity:

**\$75M**  
Opportunity

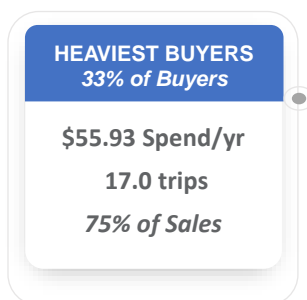
**\$36M** annually by converting 25% of Light Buyers to Medium frequency (3 more trips/year)  
**\$39M** annually by converting 25% of Medium to add 3 more trips

Source: IRI Household Panel Integrated Fresh, Custom HML Study for Mushroom Council, data ending 6-12-22

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## Getting to know the heavy mushroom buyers

Unique demographics skewing higher income



### High index > 120 — Listed in descending order

- Asian
- Age 45-64 No Kids \$70k+
- Age 65+ \$70k+
- Professional, Post-Graduate Education
- Upper (>=\$70k 1P + \$30k each additional)
- Male head of household ages 55 or older
- 2-Person households
- Ages 35-44 with kids \$70k+

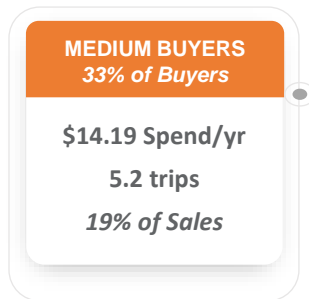
### Low index <80 Could be opportunities

- Under 35 Single No Kids City
- African American
- 65+ Under \$35k Non-City
- Lower (<\$30k 1P + \$5k per person)

Source: IRI Household Panel Integrated Fresh, Custom HML Study for Mushroom Council, data ending 6-12-22

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## Getting to know the medium mushroom buyers



### High index > 120 — Listed in descending order

- Asian
- Age of Children 0 to 5 and 12 to 17
- Age of Children All Three Groups
- Under 35 w/Kids \$70k+

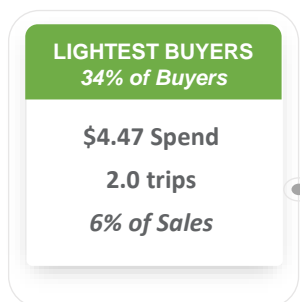
### Low index <80 Could be opportunities

- No Female Present
- Under 35 Single No Kids City
- Income \$0-34.9K
- 65+ Under \$35k Non-City

Source: IRI Household Panel Integrated Fresh, Custom HML Study for Mushroom Council, data ending 6-12-22

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## Getting to know the light mushroom buyers



### \*No Demo Group Indexed Above 119\*

- Under 35 Married No Kids City
- Age of Children 6 to 11 and 12 to 17
- No "Collar" or Skilled/Foreman Labor
- Some College Education

### No Female Present

### \*No Demo Group Indexed Below 80\*

Medium and light are not dissimilar nor strong skews = much opportunity!

Source: IRI Household Panel Integrated Fresh, Custom HML Study for Mushroom Council, data ending 6-12-22

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## Heavy buyer basket gets extra boost Especially in crimini



### \$92.53 average White Button

Heavy: \$93.93    Medium: \$91.38    Light: \$84.66



### \$105.98 average Crimini

Heavy: \$107.61    Medium: \$103.23    Light: \$95.31



### \$89.85 average Portabella

Heavy: \$90.78    Medium: \$86.67

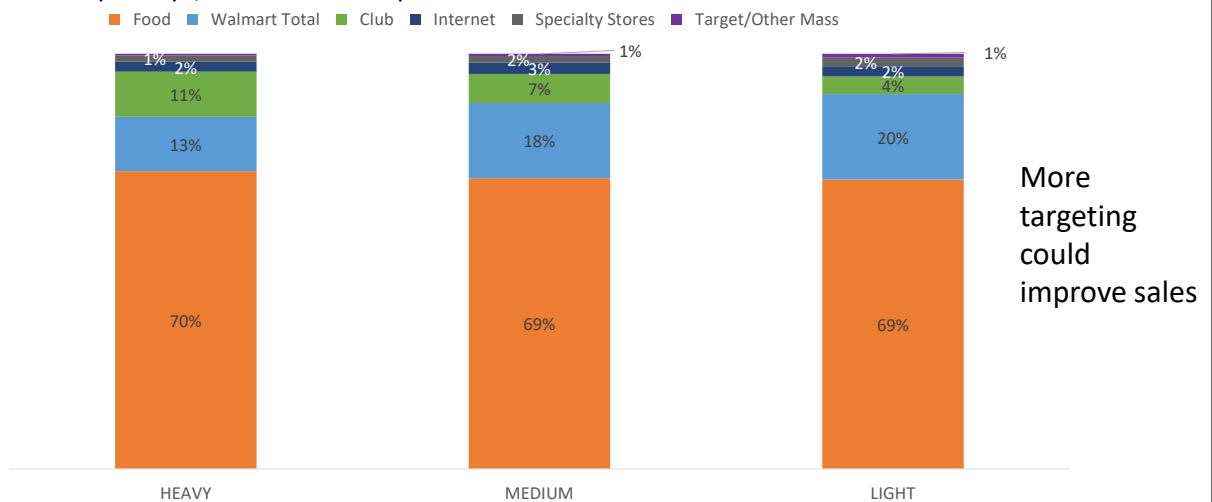
Source: IRI, Household Panel data, All outlets, mushrooms, 52 weeks ending 6/12/2022

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## Food (grocery) drives the majority of sales

Medium/light buyers are more likely to buy at Walmart vs. Heavy at club

Channel Comparison by H, M and L Mushroom Group – Dollar Sales Share of All Outlets



Source: IRI, Household Panel data, All outlets, mushrooms, 52 weeks ending 6/12/2022

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## Final thoughts

- White button mushrooms have good penetration across Heavy, Medium and Light
- White is the most popular among all groups, but a similar rate in both Heavy and Medium
  - Sales have been moving from white to brown each year
- Brown and Specialty are skewed toward Heavy
- Browns could be the potential gateway into Heavy and Medium to increase frequency and ring
- Lights could be attracted with either White or Brown
  - Or other package sizes and above all, usage occasions
- Specialty is almost exclusively purchased by Heavy with very low penetration for Medium and even Heavy



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## Final thoughts

### **Basket co-purchase insights:**

- Heavy, Medium and Light mushroom buyers have very similar baskets relative to the most popular items
  - Driven by cooking vegetables, dairy, meat and center store favorites
- All 3 groups are also buying multiple Fresh Produce categories during their mushroom buying trip
  - Fresh Onions, Tomatoes, Peppers, Lettuce/Salads and Potatoes all have high co-basket share
- Co/cross-purchase is more determined by the kind of mushroom
  - With heavy buyers mostly responsible for specialty and slight overindex for browns

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For questions or comments,  
Jonna: [Jonna.Parker@IRIworldwide.com](mailto:Jonna.Parker@IRIworldwide.com)  
Anne-Marie: [aroerink@210analytics.com](mailto:aroerink@210analytics.com)

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