



THE
MUSHROOM
COUNCIL

Getting to the Root of Mushroom Matters

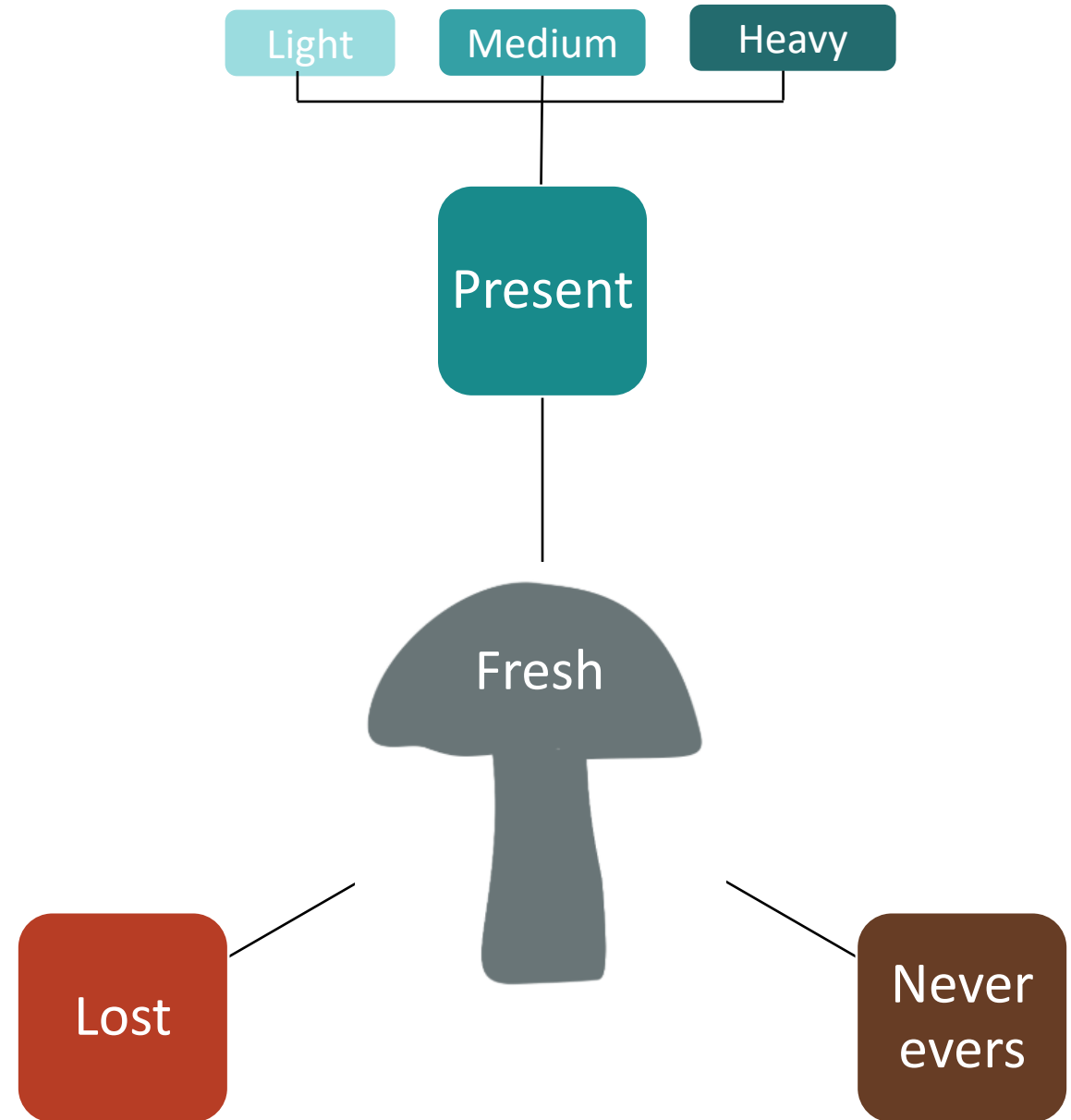
A Deep Dive into Mushroom Consumers —
Presents, Losses and Never Evers

January 2025



Methodology

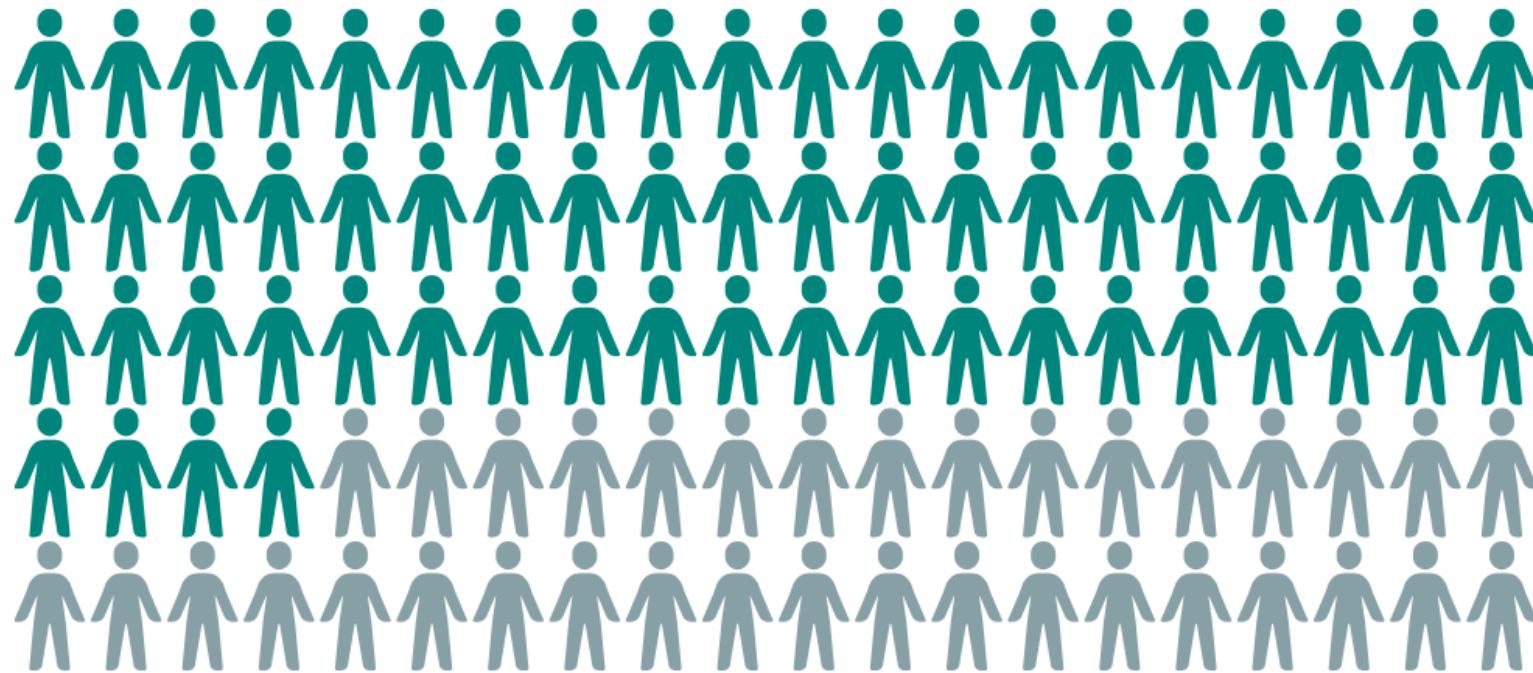
- Consumer survey
 - November 2024 among 2,000 consumers
 - Reflecting the population on key demographics and geography
 - Income
 - Ethnicity
 - Gender
 - Age
 - Region



Current mushroom consumers

48% buy mushrooms at retail per Circana

The U.S. population



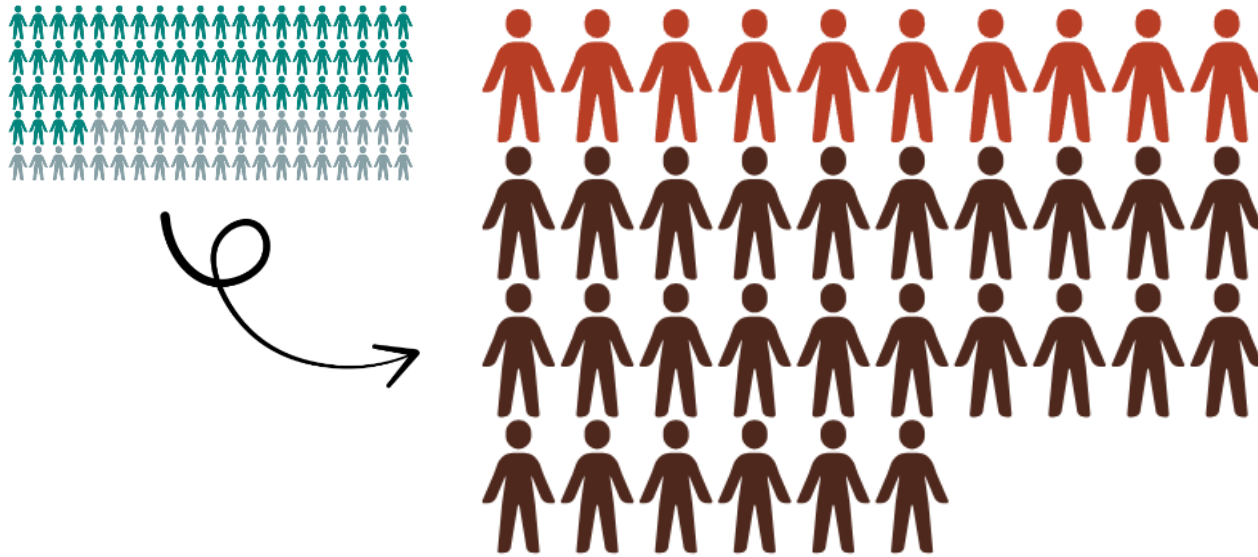
66%

Of the U.S. population consumes mushrooms at least once a year, whether at home or at/from a restaurant

Pasts and Never Evers

Looking at the 32% who don't consume fresh mushrooms, shows most never consumed them

The non-mushroom consumers (34% of the population)



10%

Of the U.S. population stopped consuming mushrooms in the past few years

24%

Of the U.S. population don't eat mushrooms now and never have



Defining the segments and opportunities

Each group has very specific attitudes, habits and opportunities

Research to understand each of the segments' habits and attitudes:



Mushroom

- Consumption
- Knowledge
- Attitudes
- Accelerators
- Detractors



Food in general

- Cooking expertise
- Restaurant engagement
- Shopping for groceries



Sustainability

- General attitude
- Mushroom knowledge



Health and wellbeing

- General attitude
- Mushroom knowledge




The Never Evers

Don't like nor eat mushrooms and never have

The Never Evers in summary

Share of the population:

24%



Over indexing as Never Evers:

- Hispanic of all ages
- Black/African American of all ages
- Lower and low-mid income
- Gen Z
- Younger Millennials
- Young kids in the household
- Low to low-middle income

Food attitude:

Functional and routine with a heavy reliance on frozen and semi/fully-prepared meals. Fast food is their primary restaurant choice.

Mushroom attitude:

Substantial dislike with little willingness to experiment with mushrooms or give them a 2nd chance

Health, sustainability and value attitude:

- Far less emphasis on health, the planet and transparency, but very concerned over food prices
- Less engaged with produce across all formats, whether fresh, frozen, canned, beverages or supplements

Most Never Evers do not eat mushrooms in any form

Delivery other than fresh could grow consumption among $\pm 5\%$ of the population

Do you consume mushrooms in other forms, whether dried, as an ingredient or powders/supplements. Please check all that apply.

Share of never evers (22% of the population)	Share
No mushrooms at all	75%
As an ingredient (like in pre-made spaghetti sauce or soup)	16%
Canned mushrooms	7%
Frozen mushrooms (by themselves or in/on a meal, like pizza)	5%
Functional mushroom powders or supplements	1%
Dried mushrooms	0%
Fresh mushrooms (like the ones in the produce department)	0%

Why canned?

- 60% More convenient
- 40% Don't go bad
- 36% Cheaper
- 32% Like them better

Why supplements and powders?

- 40% More convenient
- 40% Get the benefits, not the taste
- 36% Cheaper
- 32% Better way to absorb nutrients

Why be haters?

Well...taste, texture, smell, look, mold, touch — Never Evers have a near physical aversion to fresh mushrooms

Why do you not consume fresh mushrooms? Please check all that apply.

Top reasons among Never Evers (22% of the population)	Share
Don't like the flavor/taste	49%
Don't like the texture	40%
Don't like the smell	22%
Don't like the appearance	21%
The idea of eating fungi which reminds me of mold	20%
Don't like touching them	14%
Simply don't think to buy/order them	12%

Only reason not to buy fresh mushrooms:

2%

Too expensive/don't have the money

5%

Don't think about it. They believe more recipes would help overcome this

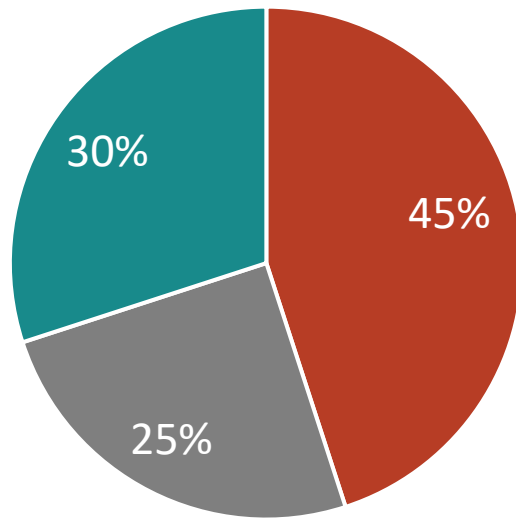
5%

Worry if they are safe to eat. The top worries are not knowing if they are the toxic kind or fresh enough

The dislike is real

Nearly half “strongly dislike” mushrooms and would remove every little bit of mushroom from a meal that had some on/in it

Would you say, you...?



- Strongly dislike mushrooms
- Dislike mushrooms
- Don't like them enough to spend money on them

If encountering a slice of pizza, cup of soup or some other meal with mushrooms in/on it, what do you do?

- 46%** I painstakingly remove every little bit of mushroom
- 28%** I remove the bigger pieces, but eat the slivers
- 26%** I just eat the meal, mushrooms and all



Top of mind association: gross

First question of the survey before respondents know what the study is about

First word that comes to mind when reading “mushrooms.”



Analysis:

- Words expressing Never Evers’ dislike of mushrooms dominate the cloud
- Others are functional descriptors of what it is (a fungi; vegetable)
- Verbatim illustration for Never Evers:

Rubbery and tastes like dirt

Word cloud, in which the size of the word corresponds to the number of times it was used

Few believe in ways to adequately hide mushrooms

Making it harder to convert Never Evers

If you were shown other ways to prepare mushrooms that result in a more favorable texture or hide the smell, would you be game?

56% No thanks, not eating mushrooms

37% I'm willing to try

5% I have tried, and still disliked it

2% I have tried it and liked it, but still not making them



[if willing]

What would prompt you to try a blended burger or blended taco meat that “hides” finely diced mushrooms in ground beef/turkey/etc. or in a sauce? Please check all that apply.

Top 3 Reasons

47% If someone else made it

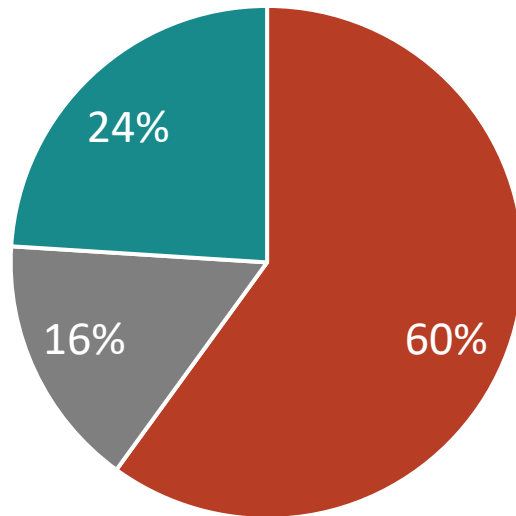
40% If they were in a sauce, like spaghetti sauce, and you can't taste them

26% If blended items were available at a restaurant I visit

Few believe in second chances

Making it even harder to convert Never Evers, especially with many dealing with others in the household who don't consume mushrooms

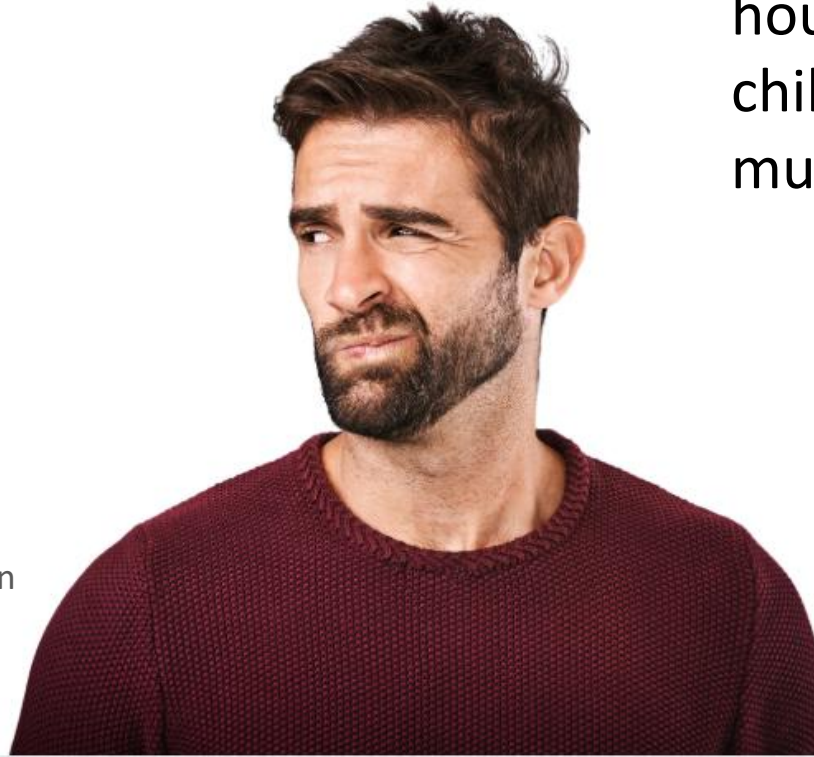
Do you occasionally check to see if you've overcome your dislike for mushrooms?



- No, never did and never will like mushrooms
- I have not, but really should see if I still dislike them
- I have tried them again on occasion, but still not a fan

71%

Say that others in their households, adults and children, won't eat mushrooms



Mushroom and general food attitudes are further roadblocks to encourage consumption

Low mushroom knowledge:

35%

Of Never Evers believe that mushrooms are nutritious, whereas 25% believe they are not

Basic approach to food:

- Shop fewer channels, buying just the food they need
- Rarely purchase restaurant food, and over index for fast food if they do
- Heavily rely on frozen and other heat & eat items versus scratch cooking
- Stick to routine meals
- Below-average focus on nutrition, sustainability and transparency
- Highly concerned about inflation

Conclusions

- It is hard to overcome “gross, yuck, nasty, eww or dislike”
 - Few engage with mushrooms in other formats (canned, dried, etc.)
 - A small number would eat mushrooms if it weren't for others in the household
- Health and sustainability are unlikely to move the dial as these consumers are less motivated in these areas in general
 - The exception are Gen Z and Young Millennials
- Moving Never Evers into Light Buyers would be a heavy lift
 - Inclusion (well hidden) in sauces is a possible pathway
 - Action: work on inclusion of mushrooms on frozen/deli pizza, sauces, etc. through CPG and retail partnerships





The Losts

Used to purchase fresh mushrooms but don't anymore.

The Losts: 10% of households in the past 5 years

Losts were mostly light and medium consumers before exiting the category

Share of the population:



Over indexing as Pasts:

- Men
- Hispanics of all ages
- Black/African American of all ages
- 1-person households
- Lower income
- Gen Z
- Younger Millennials

Mushroom attitude:

Most (76%) do consume mushrooms in formats other than fresh, especially as meal ingredients

Food attitude:

While most rely on home-prepared meals versus eating out. They are meal assemblers vs. home chefs. They heavily shop supercenters and hard discounters. Occasionally try new items.

Health, sustainability and value attitude:

- Less emphasis on health, the planet and transparency, but very concerned over food prices
- Heavily focus on convenient ways to consume produce, such as supplements, shots, smoothies, etc.

Mushroom purchases before exiting the category:

46% At the grocery store only (to prepare yourself)

26% At restaurants only (fast food to fine dining)

28% Both at grocery stores and restaurants

The estimated impact of the Losses

Using retail numbers though 26% were foodservice only purchases

Total U.S.: 128.5 million households

10% Lapsed: 12.9 million households

82% were light consumers → 0.5 lbs x 2 trips x 10.53M households = 10.5M pounds

14% were medium consumers → 1.0 lbs x 5 trips x 1.8M households = 4.5M pounds

4% were heavy consumers → 1.0 lbs x 17 trips x 0.5M households = 4.4M

19.4M lost pounds/year

28% Lapsed <1 year

36% 1-2 years

15% 3-4 years

21% 5 years

Estimated impact of the Losses since 2019

Lost pounds matches the shipping report: 896.4M in '23 - 979.3M in '19 = **-82.9M**

10% Lapsed: 12.9 million households

	<1 year	1-2 years	3-4 years	5 years	5-year impact
Total lapsed	28% -3.6M	36% -4.6M	15% -1.9M	21% -2.7M	-12.9M HHs
Light	48%	76%	58%	80%	-1 lbs/year/HH
Medium	26%	16%	33%	10%	-5 lbs/year/HH
Heavy	26%	8%	8%	10%	-17 lbs/year/HH

	<1 year	1-2 years	3-4 years	5 years	5-year impact
Light	-1.7M	-5.3M	-3.9M	-10.8M	-21.7M
Medium	-4.6M	-5.5M	-11.1M	-6.7M	-28.1M
Heavy	-14.0M	-8.3M	-8.1M	-20.2M	-50.7M
					-107.2M lbs

-84.9M pounds

While having exited the fresh mushroom category, 76% use mushrooms in other formats

Do you consume mushrooms in other forms, whether dried, as an ingredient or powders/supplements. Please check all that apply.

Share of lapsed (10% of the population)	Share
No mushrooms at all	24%
Canned mushrooms	27%
As an ingredient in things like pre-made spaghetti sauce or soup	27%
Frozen mushrooms (by themselves or in/on a meal, like pizza)	20%
Dried mushrooms	10%
Functional mushroom powders or supplements	9%
Fresh mushrooms (like the ones bought in the produce department)	0%

Canned mushrooms, or buying items that already have mushrooms in or on it, fits The Past's meal assembly approach to cooking. This style already includes ready-made sauce, soup, frozen pizza, etc. An opportunity is to spruce up these meals with fresh mushrooms.

A range of barriers prompted category exit

Dislike among others in the household, affordability, lack of top of mind, perishability are the big ones

Why do you no longer consume fresh mushrooms? Please check all that apply.

Top reasons among the Losts (10% of the population)	Share
Someone else in the household doesn't eat them, so I don't either	45%
Can't afford mushrooms with the cost of living being so high	39%
Simply don't think to buy/order them	33%
Mushrooms are too expensive	31%
Mushrooms go bad too quickly	25%
Never liked the idea of eating fungi which reminds me of mold	24%
Too much work	23%
Never liked the texture/flavor/smell all that much	21%
Worry about whether they are safe to eat	21%
Don't tend to make meals that would include mushrooms	21%
The quality in the store is lacking, they always look too old	18%
Don't or rarely buy restaurant food anymore	15%
A bad experience	12%

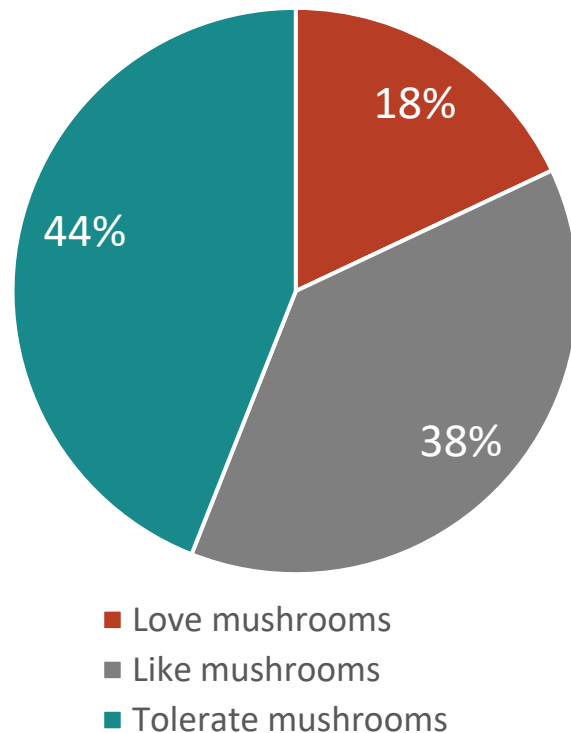
Mostly priority light consumers who like mushrooms ok, but not enough to create room in their wallets to still purchase mushrooms or go out of their way to create different meals with/without mushrooms

Was overwhelmingly pizza, burgers and steak

Losses mostly like or tolerate mushrooms

Making them an easy sacrifice for 82% as illustrated by the hypothetical scenario

Would you say, you...?



If money were no issue at all, would you resume buying mushrooms...?

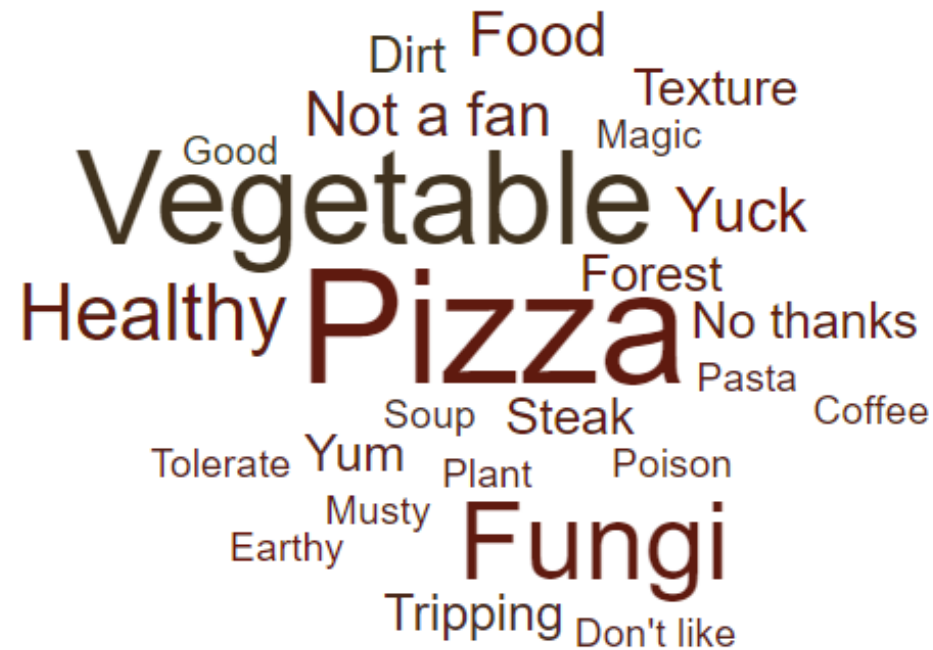
- 20% For sure
- 53% Maybe
- 20% Probably not
- 7% Definitely not

With 44% of Losses merely tolerating over loving or even just liking mushrooms, makes re-capturing their business over the next few years far from automatic.

Top of mind association: pizza

First question of the survey before respondents know what the study is about

First word that comes to mind when reading “mushrooms.”



Pizza dominates the word association, which interestingly was the most consumed cuisine with mushrooms before exiting the category. Others are functional descriptors of what mushrooms are (a fungi; vegetable; plant)

Verbatim illustrations for Losts:

I'm not crazy about them, but can tolerate them if they're in a sauce. So it's easy to live without since my husband doesn't eat them.

I used to eat them in sauces and on steak, etc. It's just one extra ingredient that I cannot afford anymore.

Word cloud, in which the size of the word corresponds to the number of times it was used

Overcoming mushrooms' "recessive gene" fate

Few believe they will be able to successfully hide mushrooms but more like the idea of adding them to just their meals

45%

Of the Losts say they stopped eating mushrooms because others in their households won't eat them

Who are those others?

44% Other adults

11% Children

44% Other adults and children

Though others in the households don't eat them, would you buy mushrooms if..? (of the 45% of Losts)

56% You had better ideas on how to add mushrooms to just your meal

33% Mushrooms were available in a small quantity, like 4 oz?

22% You had better ideas on how to "hide" mushrooms in meals and get away with it

22% You're ordering your own meal at a restaurant

The impact of others in the household not liking mushrooms is seen among Losts as well as Light Presents. Focusing on ways to add mushrooms to just part of the meal, may help bring Losts back.

Mushroom and general food attitudes are further roadblocks to encourage consumption

Lacking mushroom knowledge:

45%

Of Losts believe that mushrooms are nutritious, whereas 11% believe they are not

Greater awareness of mushrooms' nutrition and sustainability qualities than Never Evers, but marked gap with Present Purchasers.

Basic approach to food:

- Shop value channels with small sets and pre-packaged only
- Don't purchase restaurant food often, and over index for fast food if they do
- Meal assemblers, not home chefs
- Only experiment with new cuisines and flavors a little
- Below-average focus on nutrition, sustainability and transparency
- Highly concerned about inflation

Conclusions

- What looks to be a small group, 10% of the population, translates into 100 million lost pounds over 5 years
 - The mushroom override by others in the household is a substantial barrier
 - Merely like or tolerate mushrooms versus love them, so it's an easy sacrifice
- More knowledgeable about mushroom's positive nutritional and sustainability profile but Losts have a far greater focus on finances
- Moving Losts back to at least Light Buyers is challenging given the wide range of reasons, yet opportunity exists
 - **Crystal ball:** 56% of Losts believe the chance of them buying mushrooms again is 50/50 and 18% believe the chance is better than 50%
 - **Affordability:** relevant, targeted promotions and stressing the blend's ability to stretch the meat dollar
 - **The mushroom override by the household:** divide and conquer cooking, keeping pre-cooked mushrooms on hand, mushroom side dishes, hidden mushrooms, compromise dishes, etc.
 - **Lack of top-of-mind awareness:** shoppable recipes, secondary displays, etc.






The Presents

- **Light:** Purchase mushrooms a few times a year out of tradition more so than love for mushrooms.
- **Medium:** Purchase every few months
- **Heavy:** Mushroom lovers

The Presents: 64% of the population

Though not all Presents contribute to sales equally

Share of the population:



64%

Over indexing as Presents:

- Asian
- White/Caucasian
- Two-person households
- Boomers
- Gen X
- No kids in household
- High income

Mushroom attitude:

Consume fresh, often in combination with other formats, such as canned or as an ingredient

Food attitude:

Enjoyment of scratch cooking rises along with mushroom usage, with Heavy Presents being foodies. Shop supermarkets, clubs and specialty/organic stores. Engage with a wide range of restaurants from fast food and food trucks to fine dining.

Health, sustainability and value attitude:

- Highly focused on making healthy and nutritious choices, as well as sustainability and social responsibility, while less worried about inflation.
- More engaged with all forms of produce.

Mushroom purchases :

57% At the grocery store only (to prepare yourself)

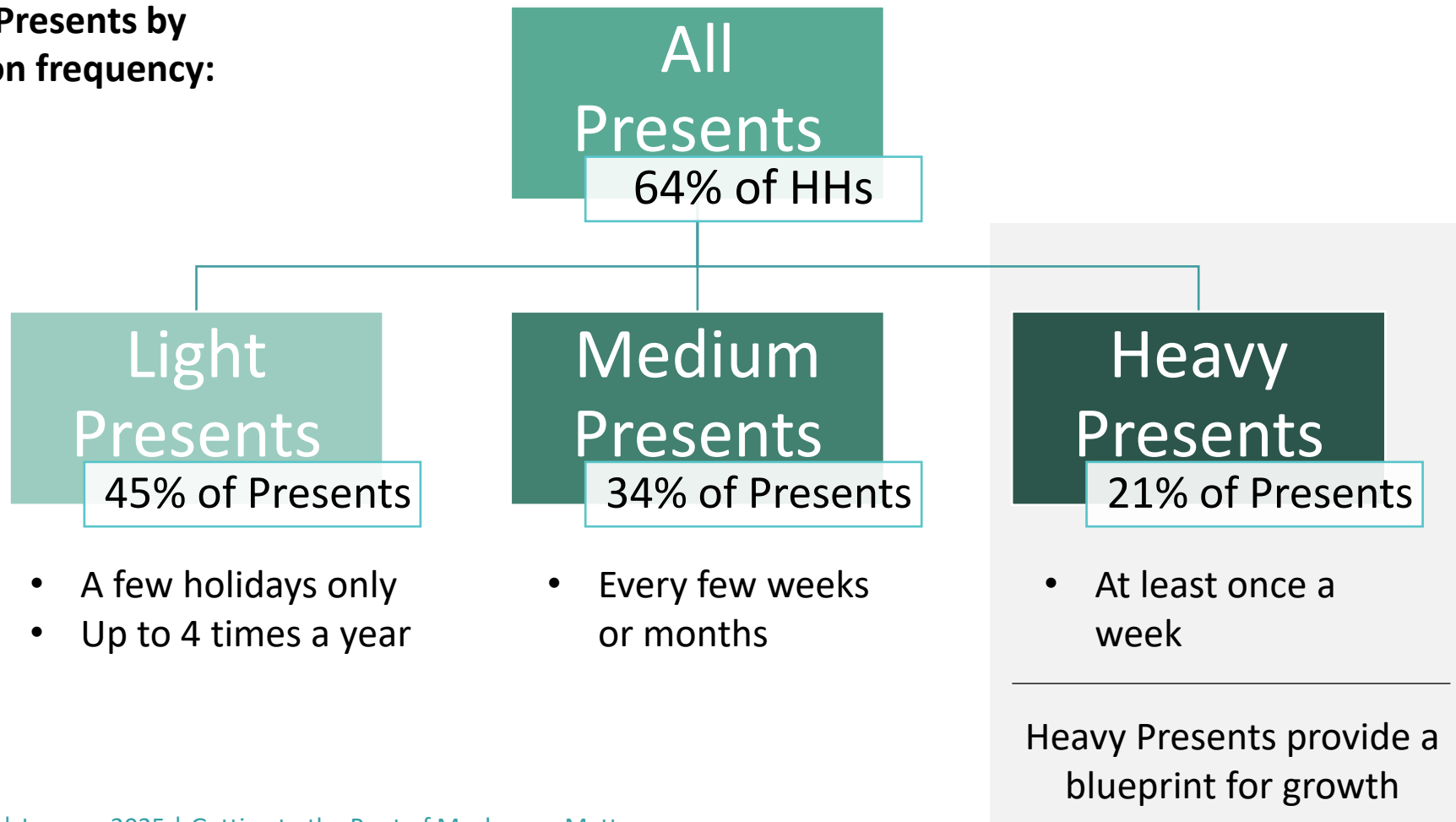
7% At restaurants only (fast food to fine dining)

36% Both at grocery stores and restaurants

Dividing current buyers into light, medium and heavy

Very similar division to seen in the Circana HML study

Division of Presents by consumption frequency:



The Heavy Presents blueprint for growth

Mushroom perceptions and habits show how to move Lights and Mediums into higher frequencies

Traits of Heavy Presents: the true mushroom lovers



Average far more meal applications with mushrooms versus the pizza connection for Light and Medium Presents.



Consume mushrooms across more meal occasions from breakfast to dinner and snacks. They have them on hand and use them up.



Consume a far greater variety of mushrooms, starting with crimini and white but many exotics as well. Upsize to larger packs to save.



Love food and love to cook. As foodies they like to explore new dishes and cuisines at home and restaurants, from fast food and food trucks to fine dining.

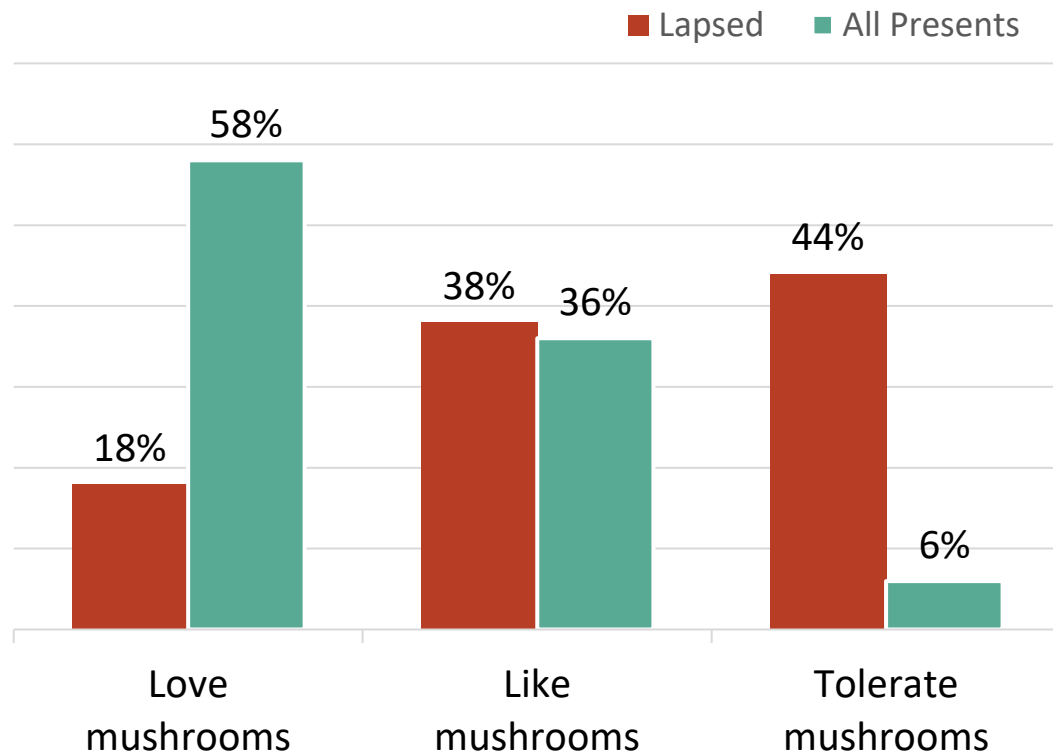


Recognize the nutritional and sustainable nature of mushrooms and see them as being good value. Want to see more nutrient info, especially vitamins.

From like to love as consumption rises

The household member barrier is much less prominent than among Pasts

Would you say you...?



58% of Presents love mushrooms

42%
Light Presents

64%
Medium Presents

82%
Heavy Presents

All members of the HH eat mushrooms: 70%

66%
Light Presents

73%
Medium Presents

79%
Heavy Presents

Heavy Presents' love for mushrooms is clear

Mushrooms rarely go to waste, are versatile and enhance meals in many ways

Mushroom meal attitudes:

% Very much Agree (4 on 4-point scale)	All Presents	Light Presents	Medium Presents	Heavy Presents
Mushrooms rarely go to waste at my house	53%	38%	55%	78%
Mushrooms make a meal taste better	46%	31%	49%	65%
Mushrooms make a meal healthier	44%	33%	47%	60%
Mushrooms are extremely versatile	43%	31%	44%	66%
Mushrooms make a meal more sustainable	33%	27%	36%	46%
I usually have mushrooms on hand	29%	19%	26%	59%
I typically look for dishes with mushrooms on restaurants' menus	23%	20%	23%	41%

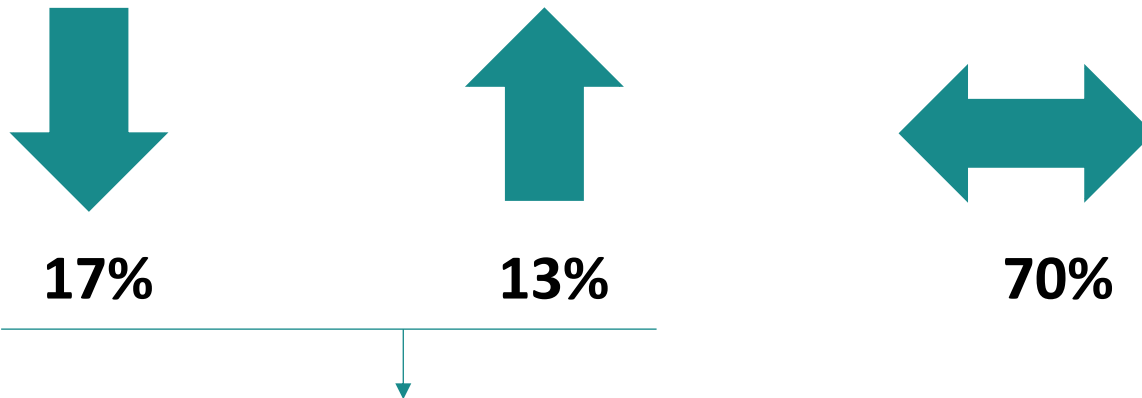
◇ Under index ◇ Over index

Heavy Presents, in particular, leverage the versatility of mushrooms to avoid wasting any at home. They believe meals taste better and healthier. The opportunity is to increase restaurant mushroom consumption, stress meal enhancement and having mushrooms on hand more often.

Consumption is mostly unchanged among Presents

Corroborated by Circana panel data that shows steady trips and spending

Thinking through your fresh mushroom consumption over the past year, would you say you now consuming...?



Net change: -4%

Vastly different patterns by segment:

Light Presents: -37%

Medium Presents: +7%

Heavy Presents: +27%

The small net negative in consumption versus year ago is driven by Light Presents, who average about 2 trips per year.

In fact, Heavy Presents, who represent a smaller 21% of consumers but some 60% of sales, show a net positive. This is likely offsetting the lost purchases among Lights — potentially growing sales among though not to the tune of offsetting the Losses.

Using Circana's panel data over the past few years shows very little change in trips and spend per trip, with household penetration being the biggest driver of decline.

If less, if more than last year — the top reasons why provide important clues

Why are you now consuming fewer fresh mushrooms?

Top 5 responses

- 39%** Simply don't think to buy/order them very often
- 28%** Don't or hardly ever buy restaurant food anymore
- 21%** Mushrooms are too expensive
- 21%** Can't afford mushrooms with the high cost of living
- 17%** Someone else in the household doesn't eat them, so I don't eat them as often



Economic impact are the #2, 3 and 4 reasons

Why are you now consuming more fresh mushrooms?

Top 5 responses

- 61%** Cooking/ordering more meals with mushrooms
- 43%** Learned about the nutritional benefits
- 42%** Learned how they add flavor to dishes
- 36%** Found new ways to prepare them
- 31%** Eating a greater variety of mushrooms

Reasons for consuming more mushrooms over the past year echo the traits of the Heavy Presents: meal and preparation variety, meal occasions, mushroom variety and nutrition.

Other changes reflect the pressure on America's pocketbooks

22%

Of mushroom consumers who purchase at least some store-bought mushrooms have made one or more changes to their purchases in the past year

Aside from how much, what, if any, are other changes you've made to your mushroom purchases?

If changes	All Presents	Light Presents	Medium Presents	Heavy Presents
Buy what's on sale	42%	37%	49%	42%
Buy different types of mushrooms	35%	20%	42%	53%
Buy a smaller container size	34%	41%	38%	19%
Buy a larger container size	31%	22%	34%	42%

◇ Under index ◇ Over index

Heavy Presents are far more likely to purchase a larger pack to save, while Light Presents move to smaller pack sizes for a better unit price. Channel shifting is also fundamentally changing the total produce dollar distribution and likely the mushroom dollar along with it.

Nutrition and sustainability matter to Heavy Presents

Delicious, nutritious and sustainable resonates with Medium and Heavy Presents in particular

Mushroom attitudes:

% Agree (4+5 agreement scale)	All Presents	Light Presents	Medium Presents	Heavy Presents
Mushrooms are healthy	86%	71%	91%	92%
Mushrooms are delicious	85%	70%	89%	96%
Mushrooms are nutritious	81%	60%	87%	90%
Mushrooms are grown sustainably	73%	60%	79%	83%

◇ Under index ◇ Over index

There is a definite correlation between positive sentiments regarding mushroom nutrition, sustainability, taste and value and the frequency of consumption

Sustainability in packaging and production can also be leveraged as purchase priorities

Mushroom attitudes:

% Purchase priority	All Presents	Light Presents	Medium Presents	Heavy Presents
Environmentally-friendly packaging (recyclable, biodegradable, etc.)	31%	36%	31%	32%
Organically grown	35%	38%	33%	40%
Brand or farm's practices in fair pay and treatment of workers	32%	36%	30%	34%
The size of the farm	19%	27%	17%	22%

◇ Under index ◇ Over index

Light Presents are younger in age and have an above average interest in sustainability (planet and people). Yet, they under indexed for knowing mushrooms are grown sustainably — a potential opportunity for education

Value perception is an opportunity area

Few light shoppers believe mushrooms provide good value for money. With most of the Pastes being light consumers before exiting the category, it underscores the impact of affordability in the current marketplace

Mushroom value attitudes:

% Very much agree	All Presents	Light Presents	Medium Presents	Heavy Presents
Mushrooms are a good value for money	35%	23%	38%	55%
I look for mushroom promotions/deals	28%	26%	29%	40%
I compare prices of different mushrooms and sliced vs. whole, etc. before buying	31%	24%	34%	42%

◇ Under index ◇ Over index

Price per pound

\$1.84 Total produce

\$1.95 Total vegetables

\$4.55 Total mushrooms

% of volume sold on merchandising (% any merch)

34.1% Total produce

24.1% Total vegetables

17.8% Total mushrooms

Source: Circana, Integrated Fresh, MULO+, 52 w.e. 12/1/2024

Top-of-mind association: healthy and delicious

First question of the survey before respondents know what the study is about

First word that comes to mind when reading “mushrooms.”



Pizza is an important connotation, but the list also includes steak, spaghetti, sauteed, salad, omelet, Italian, etc. Healthy, mmm and delicious references show the positive relationship.

Verbatim illustrations for Presents:

My favorite!

Love them!

Good source of Vitamin D

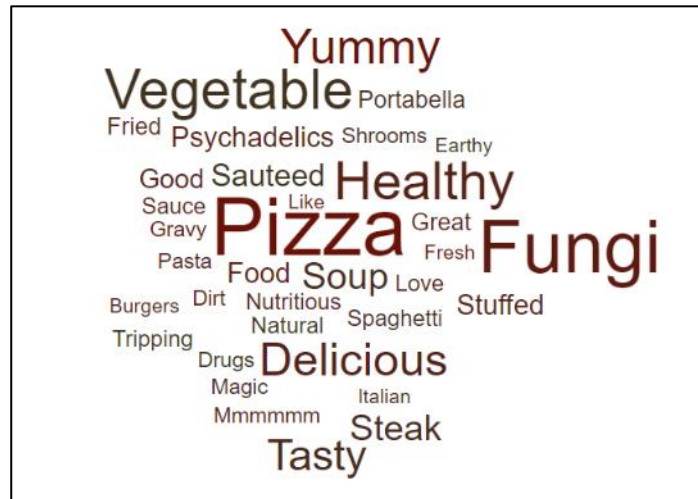
Mushrooms and garlic and a bit of salt in a pan with a bit of butter...mmmmm.

Word cloud, in which the size of the word corresponds to the number of times it was used

Heavy Presents' top-of-mind associations reflect their love and knowledge of mushrooms

First word that comes to mind when reading “mushrooms.”

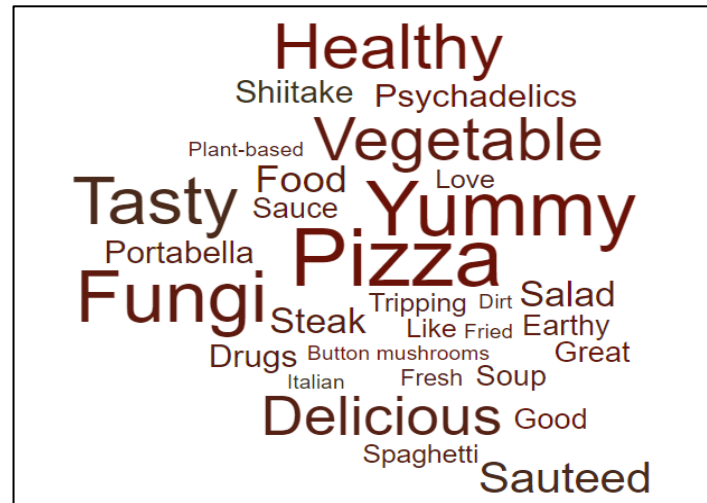
Light Present



Mostly functional:

- Meal type, especially pizza
- Fungi/vegetable
- Some positive emotions

Medium Present



Heavy Present



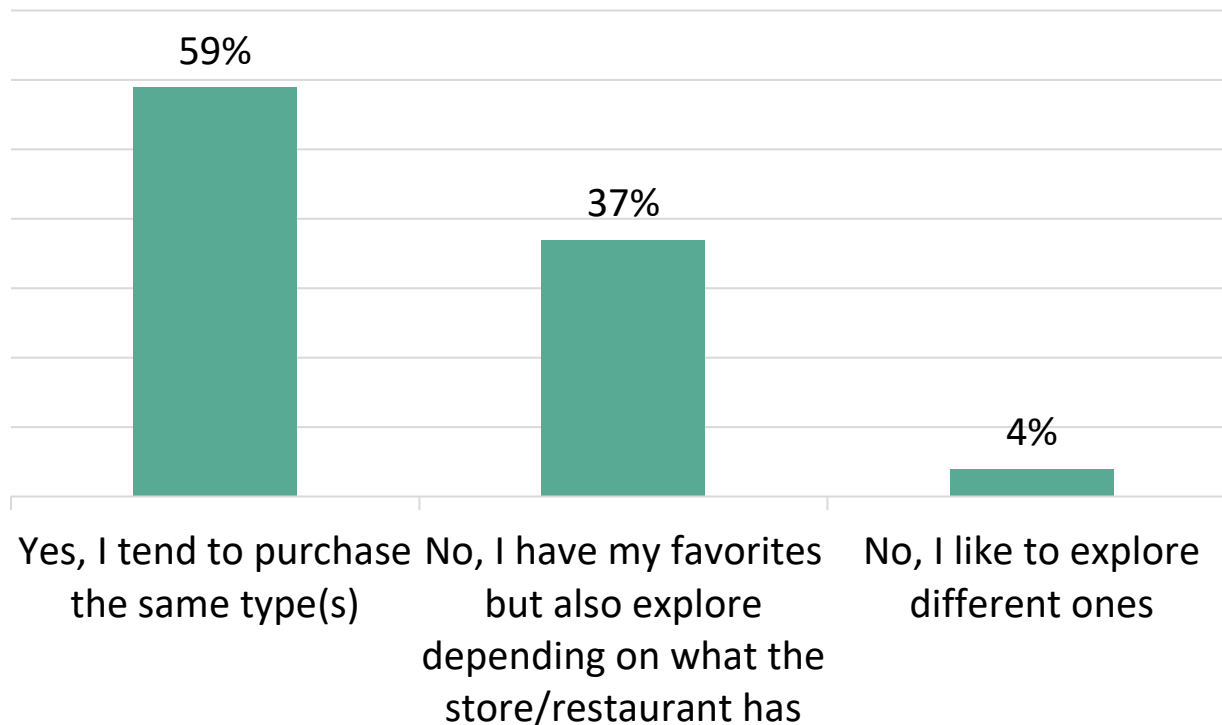
Mostly emotional:

- Delicious, healthy, tasty, yummy
- Meal type; wide variety
- Mushroom types
- Fungi/vegetable

Heavy Presents experiment with mushrooms more

Variety can be a way to increase consumption/spending among Medium Presents

Whether at home or from a restaurant, do you tend to purchase the same type(s) of mushrooms all the time?



Exploration by segment	Light Presents	Medium Presents	Heavy Presents
Same ones	66%	54%	52%
Mix	30%	41%	44%
Explore	4%	4%	5%

◇ Under index ◇ Over index

Top ways to prompt mushroom trial:

- 54%** See it on a restaurant menu
- 49%** Sampling
- 48%** Recipe
- 38%** Flavor/texture description
- 35%** Recommendation by friends/family
- 29%** Sales promotion

In-store purchase habits and preferences

Value-added sliced/cut is an opportunity to upsell Light Presents; Stuffed is an opportunity to grow consumption among all segments

Preferred mushroom purchase:

Organic vs. conventional mushrooms	All Presents	Light Presents	Medium Presents	Heavy Presents
Regular	37%	44%	36%	33%
Organic	26%	27%	24%	31%
Whatever is available	28%	21%	31%	29%
Whatever is cheaper	9%	9%	9%	7%

◊ Under index ◊ Over index

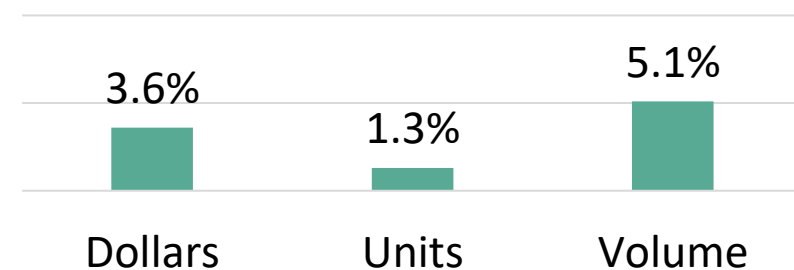
Heavy Presents show a slight preference for organic mushrooms. Importantly, they over index for buying whole, sliced and stuffed.

Organic has been a growth area for mushrooms in the past year.

Types purchased:

Whole vs. value-added mushrooms	All Presents	Light Presents	Medium Presents	Heavy Presents
Whole	86%	77%	87%	93%
Sliced/diced/cut	69%	63%	72%	73%
Stuffed	21%	14%	23%	26%

Growth vs. YA



Source: Circana, Integrated Fresh, MULO+, 52 w.e. 12/1/2024

Upsizing is an opportunity to grow sales

Ideation, promotions, but also quality influence a larger pack purchase

Package size purchasing habits:

	Tend to purchase different sizes
All Presents	34%
Light Presents	21%
Medium Presents	39%
Heavy Presents	43%

◊ Under index ◊ Over index

Reasons to purchase a 16 or 24 oz package:

Heavy Presents

59% A good sales promotion for a larger pack size	65%
48% If the larger pack is cheaper on a price/ounce basis	55%
33% Around holidays	39%
59% When needed for multiple meals planned	73%
45% When looking really fresh and I know they will last a while	58%

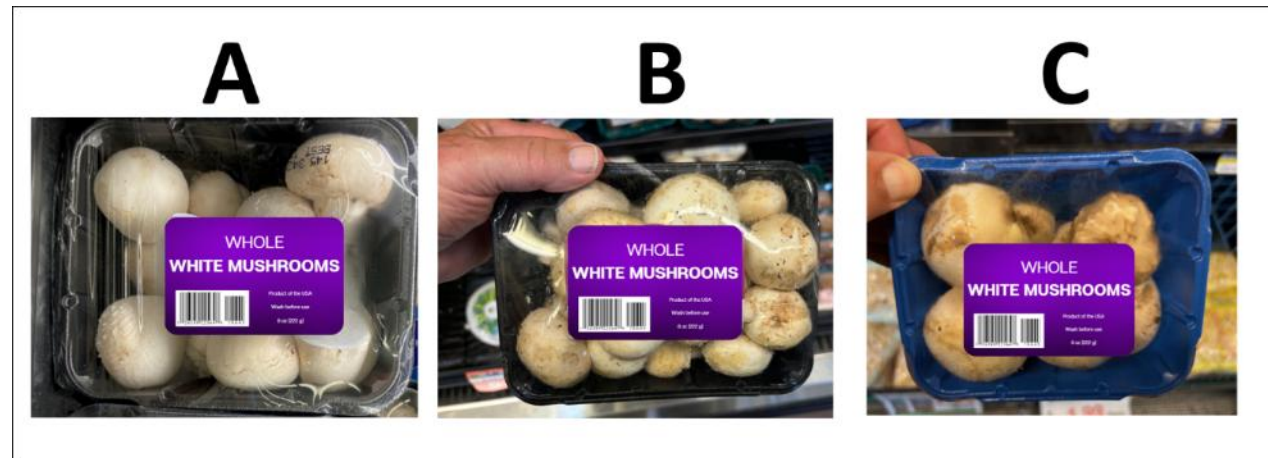
!!!

While traditional ways of discounting can drive a larger purchase, especially among Heavy Presents, good quality can do the same.

Less-than-optimal quality costs us in multiple ways

The loss of a planned purchase, no upsized purchase and no impulse. And let's not forget longer-term category engagement implications

Say you are going to the store and plan to buy fresh white mushrooms. Please have a look at the mushrooms in scenario A, B and C. Assuming the price is reasonable and the same for all, would you purchase the mushrooms in scenario...?



Yes, would buy	93%	52%	13%
Light	84%	35%	9%
Medium	89%	42%	11%
Heavy	96%	61%	15%

Substantial levels of lost business due to lack of quality, especially among Light and Medium Presents

Out-of-stocks and quality issues lead to switching, at best

Need to focus on fill rates and operational excellence

If encountering mushrooms that don't meet your freshness standards, what do you typically do?


11% Don't know, they always look fine at my store

45% Look for a different kind of fresh mushrooms instead

15% Go to a different store to buy them

13% Purchase canned mushrooms instead

17% Forego buying mushrooms altogether

- 
1. Only 11% answered quality is never an issue at their stores
 2. At best, 45% switch to another fresh mushroom, provided they look good
 3. At worst, 17% forego the purchase altogether
 4. 28% switches to another store or canned

Consistent quality issues can change habits and extend into longer-term switch behaviors and/or category exit.

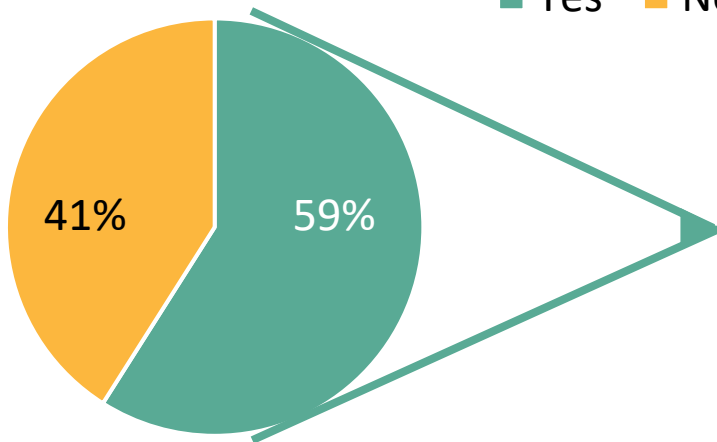
Online sales are a minor part of mushroom sales

Still, improved online conversion rate is an opportunity, especially since light consumers are more likely to order groceries online

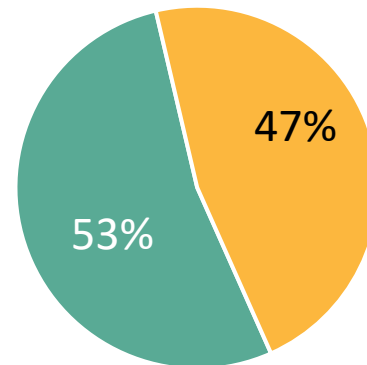
Ordering groceries and mushrooms online in the past year



■ Yes ■ No



Ordered online groceries



If yes, ordered mushrooms online?

20%

of online mushroom shoppers tend to frequently check “also buy” recommendations when buying them

27%

of online mushroom shoppers frequently check recipes when adding them to cart

17%

of online mushroom shoppers frequently have concerns over the freshness and quality of mushrooms in online orders; 54% do occasionally



Mushrooms and meal applications

Heavy Presents show that a wider variety of meal applications and occasions can drive additional consumption

Heavy Presents consume mushrooms across more meal occasions

When do you tend to consume fresh mushrooms?



Breakfast	Lunch	Appetizer or snack	Dinner	
30%	51%	31%	86%	
20%	48%	26%	66%	Light
33%	53%	30%	91%	Medium
49%	64%	44%	93%	Heavy

Heavy Presents show much greater tendency to consume mushrooms for breakfast, lunch, dinner and a snack. As seen earlier, they are more likely to purchase stuffed mushrooms, as well.

Range of meal applications underscore mushrooms' versatility, especially among Heavy Presents

What are all the ways in which you consume mushrooms?

	All Presents	Light Presents	Medium Presents	Heavy Presents
As a pizza topping	79%	68%	82%	83%
Sauteed mushrooms	63%	36%	74%	74%
As an ingredient in stir fry	58%	40%	66%	73%
As an ingredient in soup	52%	34%	59%	63%
In pasta/noodle dishes	50%	25%	56%	62%
Served with steak, chicken, pork	46%	24%	52%	61%
As a burger topping	43%	27%	51%	54%
As an ingredient with eggs and egg dishes	42%	25%	45%	67%
As a side dish	37%	21%	45%	52%
Cooked on the grill	35%	20%	37%	50%
Sliced and served raw in salad	33%	15%	36%	48%
Stuffed mushroom appetizer	31%	14%	34%	45%
As a meat substitute	27%	24%	28%	34%
Finely chopped and blended with ground meat like burgers, meatloaf, tacos, chili	23%	12%	25%	35%
Pickled mushrooms	6%	5%	8%	10%

◇ Under index ◇ Over index

While mushrooms as a pizza topping shows the least variation, substantial opportunity gaps exist in all other applications.

Upgrading ready-meals with mushrooms

Heavy Presents do so twice as often as Lights



Do you add fresh mushrooms to “upgrade” quick meals such as frozen pizza, a jar of spaghetti sauce, ramen noodles, etc.?

	All Presents	Light Presents	Medium Presents	Heavy Presents
Yes, all the time	30%	24%	31%	49%
Yes, occasionally	50%	47%	54%	39%
Yes, but only if I have mushrooms in the fridge	11%	14%	10%	6%
No	10%	14%	6%	7%

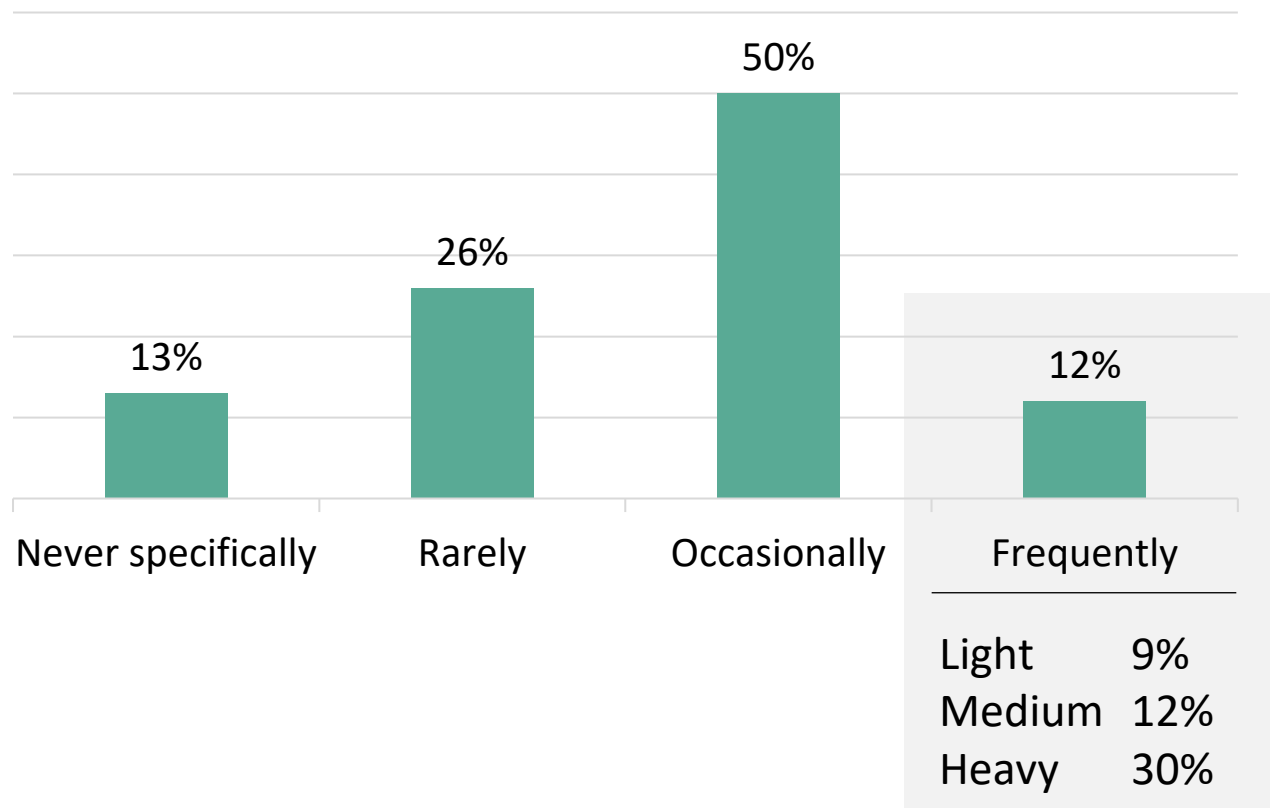
◊ Under index ◊ Over index

Many of these types of meals are winning categories as shown by volume sales vs. YA

- +3.3% Ramen
- +2.4% Shelf-stable spaghetti/Italian sauce
- +1.9% Shelf-stable soup
- +8.8% Deli pizza
- +0.5% Frozen pizza

Mushroom meal inspiration sources provide more clues on how to reach the different segments

How often do you search specifically for recipes, tips or meal inspiration that contain mushrooms?



Top research platforms

1. Online search “Google”
2. Recipe apps or websites
3. Family/friends
4. Cookbooks
5. YouTube

While nationwide stats are interesting, patterns vary widely by generation and mushroom segment

Heavy presents research mushroom recipes more often and across more platforms

What sources do you use when looking for mushroom-focused recipes, tips or meal inspiration?

	All Presents	Light Presents	Medium Presents	Heavy Presents
Google/search engines	43%	28%	48%	45%
Recipe apps or websites	41%	38%	40%	44%
Family/friends	36%	31%	35%	40%
Cookbooks	36%	30%	38%	44%
YouTube	33%	35%	28%	40%
Pinterest	23%	22%	26%	23%
Facebook	23%	24%	25%	20%
TV/streaming cooking shows	21%	21%	19%	28%
Grocery store app or website	19%	22%	20%	24%
Recipes on mushroom package	19%	14%	23%	21%
Instagram	16%	19%	18%	16%
TikTok	16%	19%	15%	18%
Magazines	13%	10%	13%	17%
Influencers	8%	12%	6%	9%
Chat GPT or other artificial intelligence	7%	8%	6%	9%

With the exception of YouTube, social media is less important to mushroom searches compared to other foods, such as meat.

The Council's partnership with AllRecipes plus search optimization for relevant key words appear key ways to highlight mushrooms.

Recipe inspiration can prompt unplanned purchases, at retail and restaurants

When shopping or ordering restaurant food, what could prompt you to purchase mushrooms if you had not planned to? Please check all that apply.

	All Presents	Light Presents	Medium Presents	Heavy Presents
A recipe idea	52%	51%	49%	59%
A great deal or discount	45%	35%	48%	51%
Sampling a dish using mushrooms	38%	35%	39%	40%
A meal display, featuring all ingredients for the meal, such as omelets	31%	34%	32%	37%
Recommendation for the menu item	31%	19%	36%	39%
Mushrooms in more than one location, such as near steak, eggs, pizza, etc.	29%	25%	32%	34%
Ready-to-cook mushrooms that are pre-stuffed, pre-washed or pre-sliced	24%	17%	27%	30%
Attractive display or prominently called out on the menu	20%	13%	20%	30%

◊ Under index ◊ Over index

Recipes work for all segments to prompt an impromptu mushroom purchase.

Heavy Presents can be prompted to purchase mushrooms at the store or at a restaurant in many ways, from a great deal to an eye-catching display.

Four areas emerge as desirable on-pack info

Nutrition info, recipes, storage info and sourcing

What information would you like to see on mushroom packages?

	All Presents	Light Presents	Medium Presents	Heavy Presents
Nutrition/health callouts	57%	48%	59%	64%
Recipes	48%	43%	48%	56%
Storage recommendations	46%	45%	48%	45%
Farm location (city, state, etc.)	40%	28%	44%	49%
Farm/farmer information	31%	27%	32%	37%
Environmental information, such as carbon footprint	23%	26%	23%	27%
None of these	7%	7%	6%	4%

◇ Under index ◇ Over index

Heavy Presents have an above-average interest in nutrition/health callouts and recipes, in particular.

As seen earlier, they are most likely to search for mushroom-centric recipes often and across platforms.

Vitamins top the list of desired nutrition info

Combine the feature and the benefit for optimal result

What nutrition information would you like to see prominently highlighted on the top/front of mushroom packages?

	All Presents	Light Presents	Medium Presents	Heavy Presents
Vitamins (D, E, B2, B12, etc.)	72%	69%	73%	78%
Protein	66%	65%	69%	67%
Calories	57%	60%	55%	51%
Serving size	47%	43%	50%	48%
Sodium	35%	43%	36%	36%
Total fat	30%	42%	29%	27%
Saturated fat	22%	31%	23%	16%
None of these	4%	1%	3%	4%

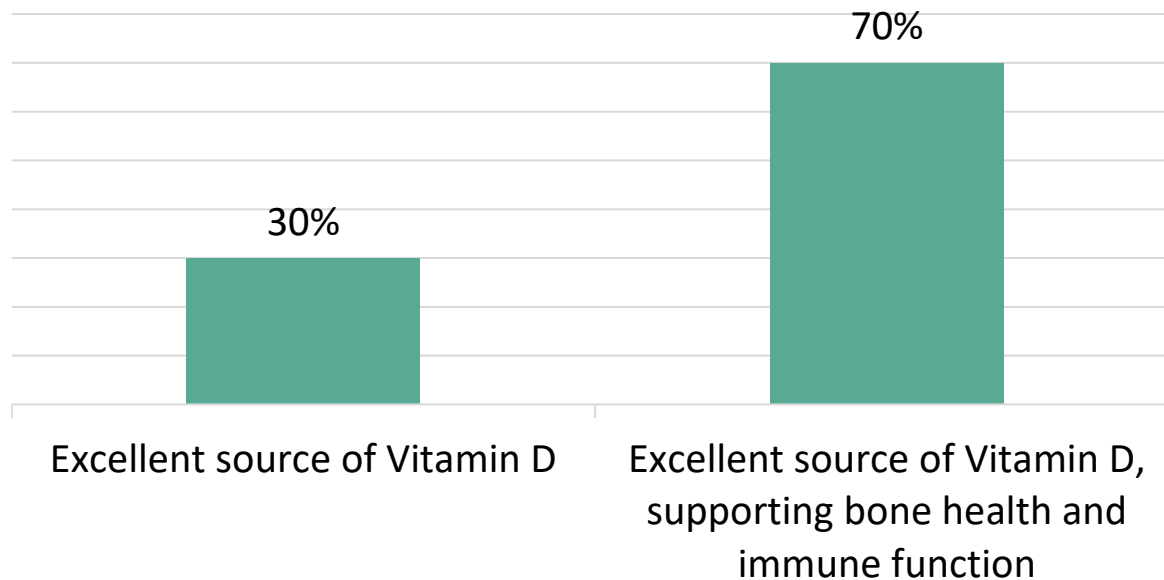
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Nutrition information is of interest to all consumption segments.

While front-of-pack nutrition labeling is common in Europe and other parts of the world, fewer nutritional callouts are common on U.S. packages.

7 in 10 prefer connecting the feature to the benefit in our example of Vitamin D

[if interested in nutrition information] What is your preference for nutrition callouts on the front/top of the package, using Vitamin D as an example.





Key takeaways

Final thoughts by segment

Key takeaways by segment

Never Evers

The dislike for mushrooms is real, with little enthusiasm to hide mushrooms in the meal or give them a second chance.

Opportunities:

- Strong reasons to give mushrooms a second chance, with a focus on nutrition
- Optimize mushrooms in/on ready-made meals, sauces, soups, etc.
- Solutions to prevent the group dynamic mushroom override for those who do like them

The Losts

Stopped eating mushrooms in the past 5 years. The mushroom override by others in the household, awareness and affordability are key reasons.

Opportunities:

- Solutions to prevent the group dynamic mushroom override
- Build value-for-money narrative, including the blend and nutritional value
- Leverage pizza (most common prior mushroom connection) to bring them back

The Presents

Range from mushroom dabblers to true lovers.

Opportunities:

- Leverage the traits of Heavy Presents as a blueprint for growth for Light and Medium
- Inspiration and quality can drive larger and impulse purchases
- Optimize mushroom usage across meal occasions, dishes and greater variety
- Use new recipes/appliances to move people from tolerate to like to love