INTERNATIONAL FRESH PRODUCE ASSOCIATION

2024 United States

Produce Industry Brand

Who we are:

International Fresh Produce Association (IFPA) is the leading global trade association representing companies in the fresh produce and floral supply chain.

We are here to:

- advocates for members and industry;
- connects individuals and organizations with ideas, data and with each other;
- guides with education, insight, expertise, and solutions.

Produce Industry Branding

In today's fast-paced world, people turn to quick, convenient meals and snacks. But where will they look tomorrow? The fruit and vegetable industry's brand is vital in capturing consumers' attention and preference.

Why it matters: Understanding our brand is crucial. By resonating with consumers, we can increase our share of stomach and compete against other grocery store products.

The big picture: A brand is shaped by consumer perception and every aspect of the industry. And to win the food fight, fruits and vegetables must compete with various grocery store sections.

The bottom line: Consumer feedback helps us understand brand perception and increases our share of stomach.

Understanding Brand Perception

Brand perception is crucial in developing relationships with customers and winning their loyalty.

Why it matters: Consumers always consider their emotional connection when choosing between items that fulfil a similar purpose whether it be hunger in the produce category or indulgence in the floral category.

The big picture: Understanding the personality and attributes of our industries helps us connect with consumers.

The bottom line: Leverage industry personality and attributes to help shape your brand perception with consumers.

A guide for marketers

What this research tell us:

- The reputation of the produce industry is strong for businesses to build their messaging.
- The produce industry is not seen as dynamic so we can benefit by demonstrating innovations in breeding and growing as well as showing produce in modern settings.
- Produce marketing can build off the industry's personality of being consistent and trustworthy– "fruits and vegetables should be the highlight of every meal."
- There are opportunities to build on produce is good for public health and unique products. These matter to consumers, yet the produce industry is not leveraging these attributes.
- To attract the best talent, is important that consumers have a line of sight to production.
- Gen Z has the least favorable impression of the produce industry, making it important to demonstrate the modernity of the industry to attract new talent.

Our Research Methodology

The study was conducted using an online methodology, with all fieldwork conducted on the Russell Research survey website.

A total of 4,533 interviews were conducted from February 9 – 28, 2024.

To qualify for study inclusion, respondents were screened to meet the following qualifications:

- Age 18 - 78
- Primary or shared responsibility for purchasing groceries for household
- Purchase groceries once a month or more often
- Typically purchase groceries at a supermarket/grocery store or online retailer
- Reside within the United States, Brazil, the United Kingdom, Germany, China or Australia
- Does not work in a competitive industry

All research was carried out in compliance with all relevant legal and ethical requirements within the United States and in compliance with ISO 20252:2019.

United States Summary

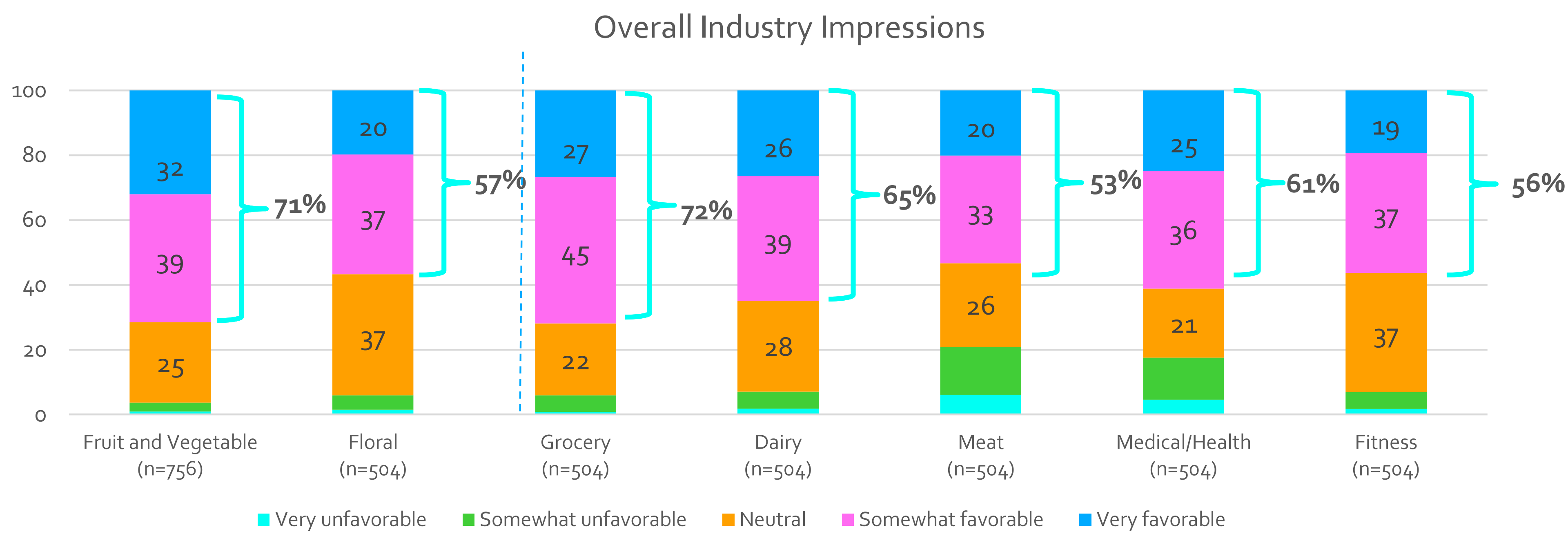
- Consumer impressions of the US fruit & vegetable industry are strong compared to benchmark industries.
  - Over 7 in 10 respondents have a favorable impression
  - Nearly half of consumers believe the industry is *'on its way up'* while remaining consumers believe its *'holding its ground'*. These momentum ratings are at parity or better than competitive benchmarks.
  - Fruit & Vegetable industry has the strongest reputation; significantly higher than all other industries.

Fruit & Veggie Industry	**Fruit & Veggie Industry Personality Traits**
• Makes room for a variety of brands, • Promotes both public and individual health • Offers affordable options.	• Simple • Consistent • Trustworthy • Friendly • Approachable

- Relative importance analysis indicates a need to communicate the industry is *Transparent in its production/service methods.*

Consumers have a more favorable impression of the produce industry than the benchmarked industries except grocery – where it is on par.

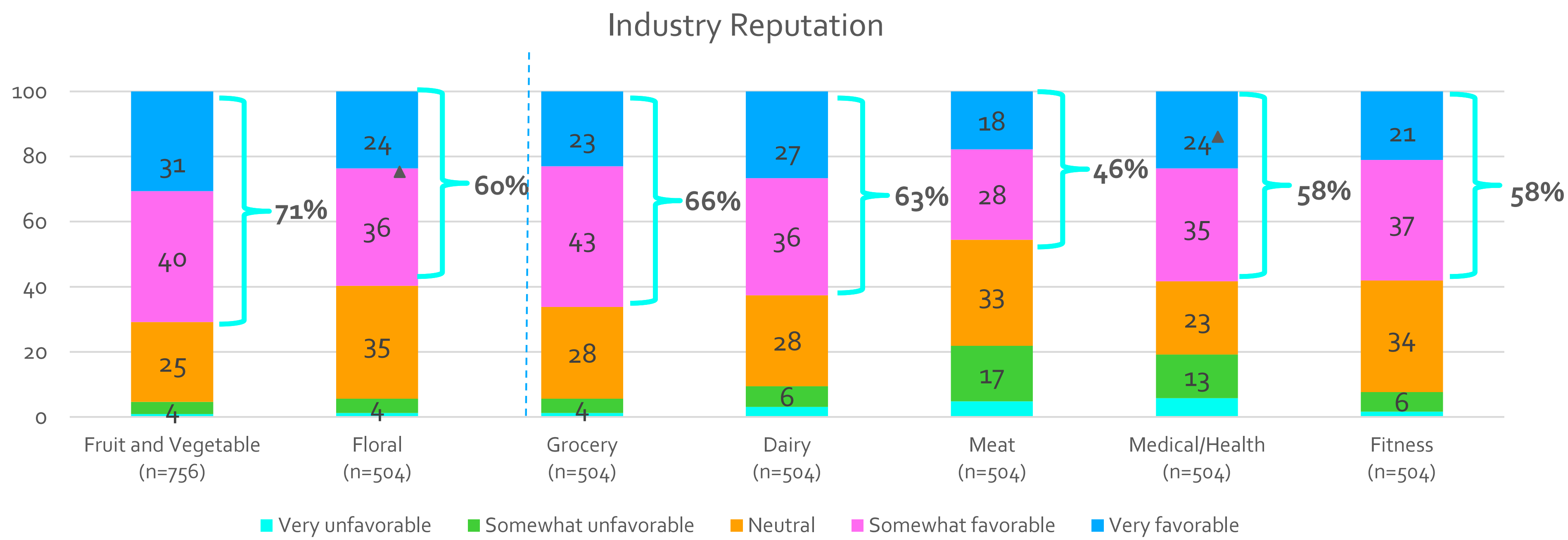
TIP: The produce industry's reputation is strong for businesses to build their messaging.



Base: Total US Respondents Evaluating Industry
3. What is your overall impression of the [INSERT INDUSTRY]?

Consumers believe the US produce industry has a favorable reputation. It exceeds all benchmarked industries.

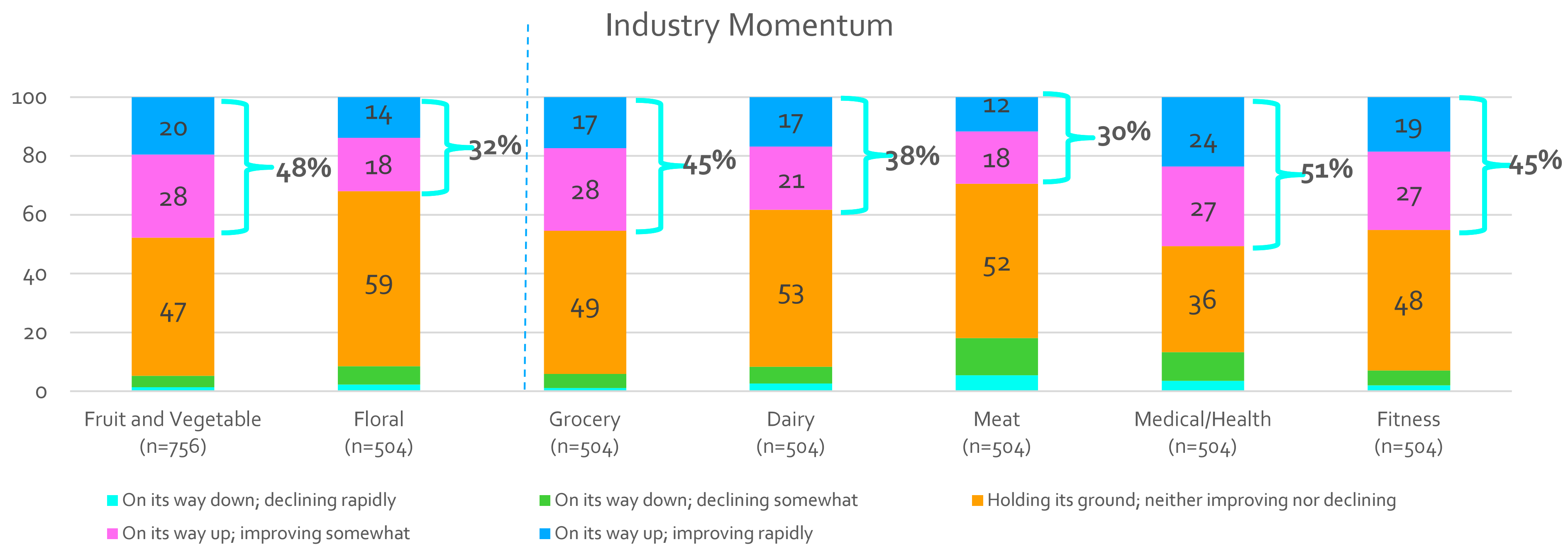
TIP: Produce companies can build upon the strong reputation of the industry in its messaging.



Base: Total US Respondents Evaluating Industry
6. Which of the following best describes what you feel is the current reputation of the [INSERT INDUSTRY]?

Most consumers view the produce industries as stagnant – neither improving or declining.

TIP: This is an opportunity for the industry to show its dynamic and innovative side.



Base: Total US Respondents Evaluating Industry

5. When you think about certain industries, some seem to be on their way up and have a lot going for them, while others don't. Which of these statements best describes how you feel about the [INSERT INDUSTRY]?

Industry Drivers United States

Relative Importance for Fruit and Vegetable Industry

Relative Importance

What is it?

It is an extension of regression analysis that allows us to assess which attributes are most important and exactly how much more important one is than another.

The most important factors to U.S. consumers when evaluating the produce industry are:
Promotes public health
Is Trustworthy
Offers unique products and experiences

	Relative Importance	Rank Order
Total US Respondents	(756)	
Promotes public health	9.29	1
Is trustworthy	9.27	2
Offers unique products and experiences	9.24	3
Is transparent in its production/service methods	8.41	4
Promotes individual health	7.65	5
Makes room for a wide variety of brands	7.52	6
Treats employees fairly	6.10	7
Is innovative	5.88	8
Adapts quickly to meet the needs of consumers	5.71	9
Uses technology wisely	5.49	10
Creates products or services worth paying extra for	5.30	11
Attracts top talent	5.26	12
Is mindful of the environment	4.85	13
Offers affordable options	4.30	14
Values diversity, equity and inclusion	2.87	15
Helps solve some of society's most pressing problems	2.86	16

Stated vs. Relative Importance – Produce Industry

The results of the Relative Importance Analysis (regression analysis) are compared to what consumers state is important to them and plotted on a quadrant map. From this map, three important groupings of attributes are defined as follows:

Critically Important

(High Relative / High Stated Importance)

- **These are strong positioning attributes if an industry can deliver in these areas.**
  - ✓ Is trustworthy
  - ✓ Is transparent in its production/service methods
  - ✓ Makes room for a wide variety of brands
  - ✓ Promotes individual health

Hidden Opportunities

(High Relative / Low Stated Importance)

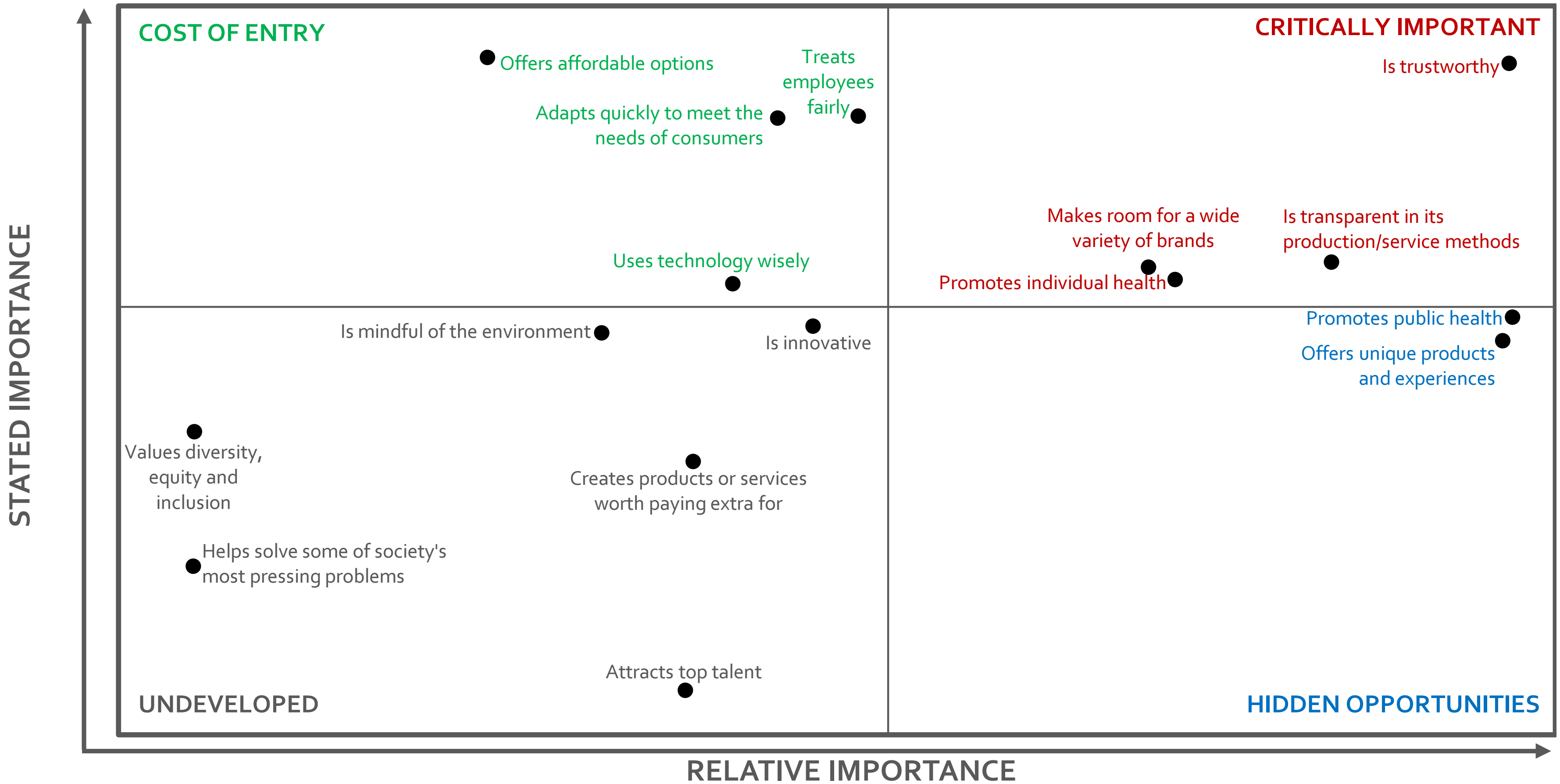
- **These drivers may not be expressed but are important positioning attributes.**
  - ✓ Promotes public health
  - ✓ Offers unique products and experiences

Cost of Entry

(Low Relative / High Stated Importance)

- **These are important for all category industries to deliver. They are necessary but provide no leverage.**
  - ✓ Treats employees fairly
  - ✓ Offers affordable options
  - ✓ Adapts quickly to meet the needs of consumers
  - ✓ Uses technology wisely

Stated vs. Relative Importance – US Produce Industry



US consumers are most likely to agree that the produce industry:

Makes room for a variety of brands
Promotes both public and individual health
Offers affordable options

Industry Descriptor Agreement Ratings
(Top-Two Box Ratings: Agree Completely/Somewhat)

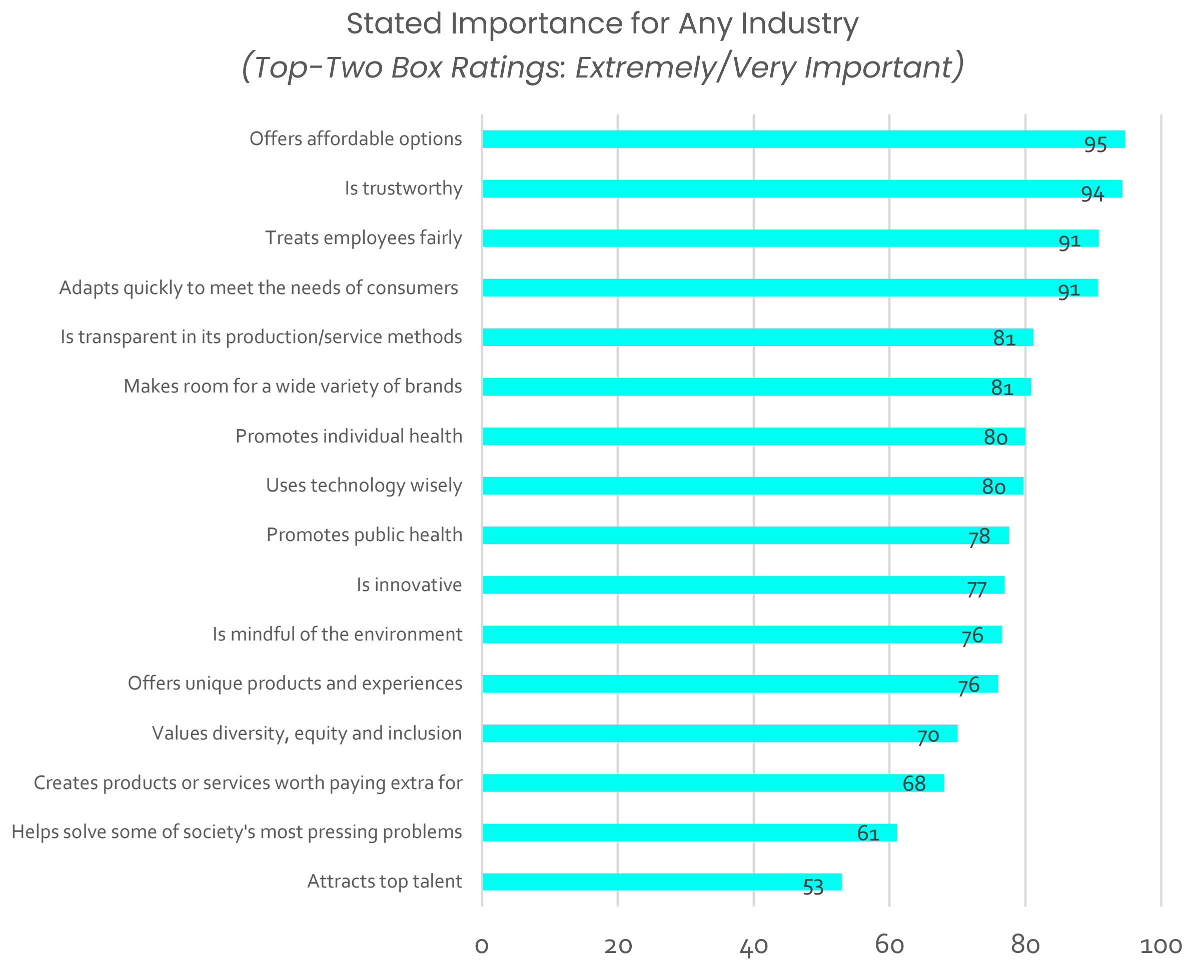
	Fruit and Vegetable	Floral	Grocery	Dairy	Meat	Medical/ Healthcare	Fitness
Total US Respondents Evaluating Industry	(756)	(504)	(504)	(504)	(504)	(504)	(504)
	%	%	%	%	%	%	%
Makes room for a wide variety of brands	77	65	84	75	67	64	61
Promotes public health	77	40	67	67	52	84	80
Promotes individual health	76	41	67	67	49	81	86
Offers affordable options	76	62	80	77	63	49	63
Is mindful of the environment	72	66	59	62	49	54	49
Is trustworthy	72	62	73	72	54	67	62
Adapts quickly to meet the needs of consumers	71	64	77	71	64	73	69
Offers unique products and experiences	70	72	74	67	59	70	70
Creates products or services worth paying extra for	64	57	63	58	54	56	54
Is transparent in its production/service methods	63	55	62	61	48	56	58
Is innovative	62	58	67	63	51	79	70
Uses technology wisely	58	47	66	58	48	78	67
Treats employees fairly	54	54	64	55	44	61	56
Helps solve some of society's most pressing problems	53	38	52	44	38	69	48
Values diversity, equity and inclusion	52	49	63	48	44	63	61
Attracts top talent	41	44	45	41	32	64	51

2. Thinking about the [INSERT INDUSTRY], how much do you agree or disagree that the following **attribute** describes this industry?

When thinking about any type of industry…

U.S. consumers place the highest importance on

Affordability
Trustworthiness
Making sure its employees are treated fairly
Adapt quickly to meet consumer needs.



Base: Total US Respondents (n=756)
1. How important is it to you that any type of industry …?

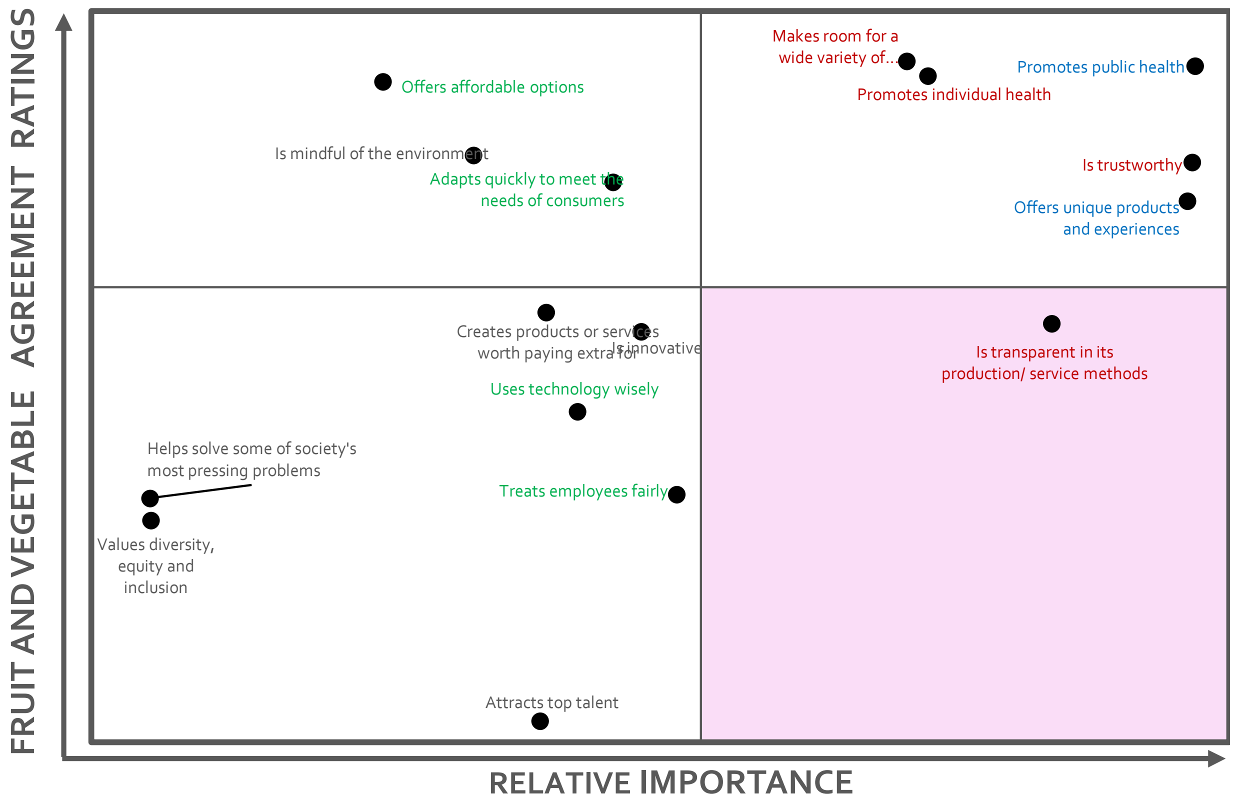
The relative importance of each statement and respondents' agreement that the industry portrays that statement was plotted on this map.

Attributes on the right side are most important to respondents.

Attributes appearing in the lower right quadrant need the greatest attention—they are high in relative importance but rated low for the industry.

The US produce industry has an opportunity to be transparent in its production/service methods.

Relative Importance vs. Produce Agreement Ratings



Produce Industry Personality

AI Chosen Image to Depict Produce Industry

	Fruit and Vegetable	Floral	Grocery	Dairy	Meat	Medical/ Healthcare	Fitness
Total US Respondents Evaluating Industry	(756)	(504)	(504)	(504)	(504)	(504)	(504)
	%	%	%	%	%	%	%
Simple	38	25	30	31	22	9	16
Consistent	36	23	42	37	30	26	28
Trustworthy	35	24	37	34	22	34	22
Friendly	33	41	38	28	17	27	36
Approachable	30	29	39	25	17	27	28
Honest	27	18	26	26	19	24	19
Classic	27	34	30	34	27	14	13
Confident	22	19	26	20	22	35	38
Accepting	20	16	27	19	16	26	27
Budget-Conscious	19	10	28	17	16	11	10
Expert	19	19	16	23	22	48	26
Modern	18	23	26	25	20	36	31
Fun	17	35	13	9	8	4	32
Casual	15	19	27	17	13	7	18
Exotic	13	28	4	4	4	2	5
Trendy	13	24	15	9	9	6	38
Adventurous	13	14	9	8	9	6	26
Formal	6	27	6	5	8	16	6
Outdated	4	6	5	8	11	7	1
Boring	3	4	3	6	4	4	6
Uptight	2	3	4	4	3	12	6

4. Imagine for a moment the [INSERT INDUSTRY] was a person. What types of words and/or descriptions would you use to describe that person? Please select as many or as few adjectives and/or descriptors you'd like.

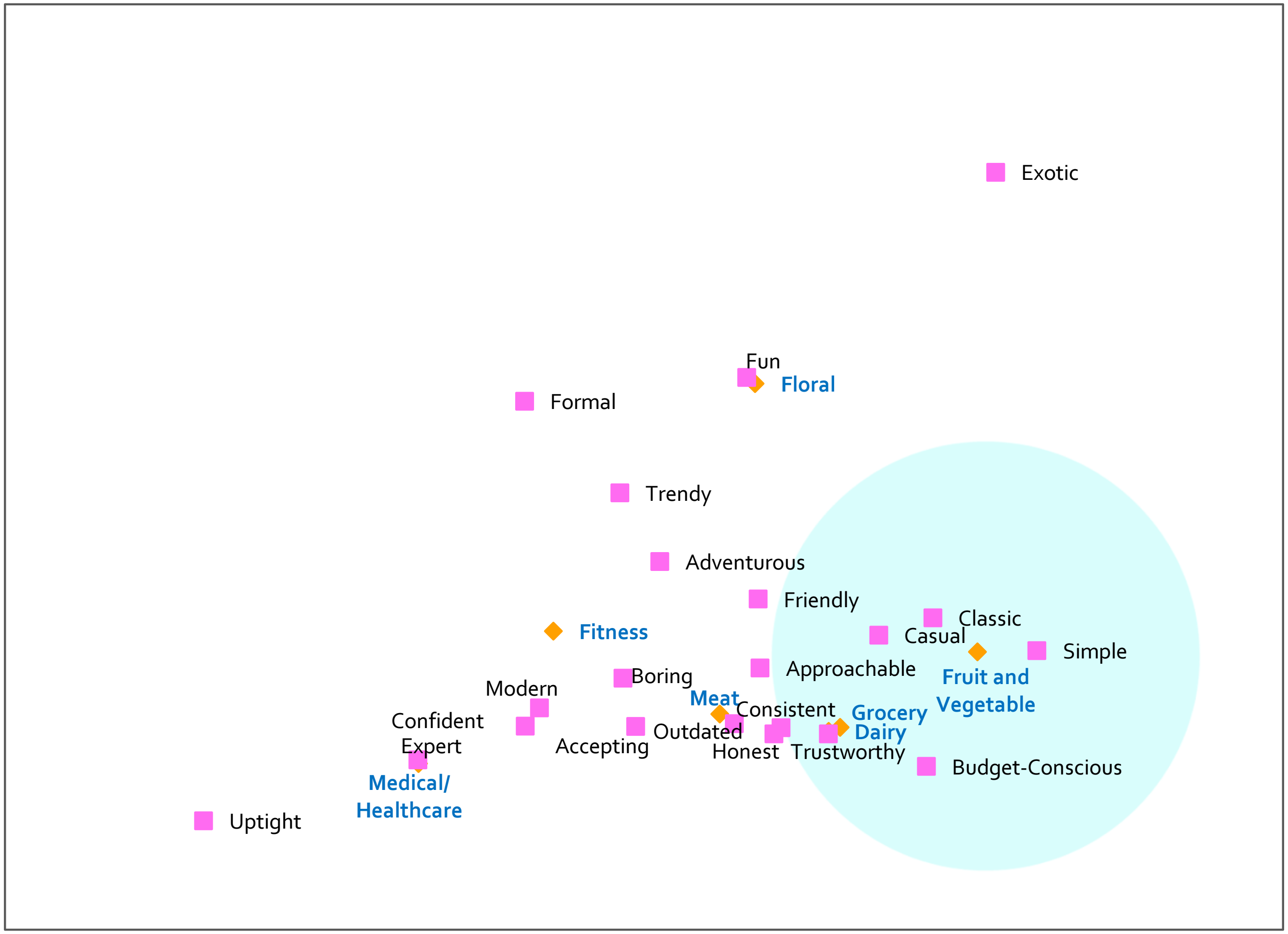
Industry Personality Correspondence Map

Correspondence analysis

What it is:

A mapping technique that allows us to determine which industry attributes are most differentiating for and which attributes would need to be changed to move industry perceptions closer or farther from another industry.

Industries and attributes that are rated similarly are placed close to each other on the map, while those that are rated differently will appear in a different area of the map.



Fruit and Vegetable Industry Findings By Key Segments

Gen Z has a more negative view of the produce industry than other generations.

		Gender		Generation				Income	
	Total US	Male	Female	Gen Z	Millennials	Gen X	Boomers	Under $75K	$75K or More
Total US Respondents	(756)	(361)	(390)	(74)	(172)	(228)	(282)	(561)	(173)
	%	%	%	%	%	%	%	%	%
Overall Impression of Industry									
Very Favorable	32	33	31	26	39	31	30	32	32
Very/Somewhat Favorable	71	72	71	61	73	71	77	71	77
Industry Momentum									
On its way up /Improving rapidly	20	19	20	16	25	19	16	19	21
On its way up /Improving rapidly or somewhat	48	49	47	43	47	48	52	47	53
Industry Reputation									
Very Favorable	31	31	31	20	38	31	28	31	33
Very/Somewhat Favorable	71	73	69	64	72	72	73	69	77

Gen Z and females are less likely to associate key attributes with produce industry.

Fruit and Vegetable Industry Findings By Key Segments

		Gender		Generation				Income	
	Total US	Male	Female	Gen Z	Millennials	Gen X	Boomers	Under $75K	$75K or More
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	%	%	%	%	%	%	%	%	%
Makes room for a wide variety of brands	77	78	77	70	76	79	81	76	83
Promotes public health	77	80	74	72	80	78	76	77	80
Promotes individual health	76	78	75	69	79	79	77	76	78
Offers affordable options	76	78	74	76	76	76	77	75	83
Is mindful of the environment	72	74	70	59	74	77	72	71	76
Is trustworthy	72	75	69	64	74	72	73	70	77
Adapts quickly to meet the needs of consumers	71	71	70	61	73	71	73	71	72
Offers unique products and experiences	70	73	66	66	74	69	67	69	75
Creates products or services worth paying extra for	64	66	61	54	73	62	60	64	65
Is transparent in its production/service methods	63	66	60	58	70	62	59	63	63
Is innovative	62	66	59	57	67	61	63	64	62
Uses technology wisely	58	63	54	53	65	57	55	58	61
Treats employees fairly	54	54	53	51	57	57	47	55	49
Helps solve some of society's most pressing problems	53	55	52	54	66	53	40	53	56
Values diversity, equity and inclusion	52	53	51	45	63	53	44	54	48
Attracts top talent	41	46	36	35	51	42	33	42	39

Produce Industry Findings By Key Segments

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Total US Respondents	(756)	(361)	(390)	(74)	(172)	(228)	(282)	(561)	(173)
	%	%	%	%	%	%	%	%	%
Simple	38	39	37	41	34	40	39	38	37
Consistent	36	38	35	27	31	39	43	36	36
Trustworthy	35	36	33	22	37	39	35	35	34
Friendly	33	33	32	32	32	33	35	32	36
Approachable	30	28	32	27	26	31	36	31	26
Honest	27	31	24	18	31	30	26	27	26
Classic	27	23	30	30	21	31	27	26	30
Confident	22	22	21	14	25	25	20	22	22
Accepting	20	22	19	24	23	18	17	21	16
Budget-Conscious	19	21	18	19	13	25	19	20	13
Expert	19	23	15	8	20	22	20	18	20
Modern	18	21	15	14	17	22	17	18	16
Fun	17	16	18	12	24	16	12	17	18
Casual	15	15	15	18	15	17	12	16	12
Exotic	13	15	12	16	18	13	7	15	10
Trendy	13	15	10	15	17	13	7	13	11
Adventurous	13	17	9	18	15	12	9	14	9
Formal	6	7	5	7	9	5	2	6	5
Outdated	4	7	2	7	4	4	3	4	6
Boring	3	3	2	3	5	2	1	3	2
Uptight	2	3	1	3	5	1	1	2	5

While Gen Z has a more negative view of the produce & floral industries, they have less shopping responsibilities.

Shopping Habits

		Gender		Generation				Income	
	Total US	Male	Female	Gen Z	Millennials	Gen X	Boomers	Under $75K	$75K or More
Total US Respondents	(756)	(361)	(390)	(74)	(172)	(228)	(282)	(561)	(173)
	%	%	%	%	%	%	%	%	%
Responsibility for Grocery Purchases									
Primarily responsible	72	72	73	46	79	75	79	75	68
Share responsibility	28	28	27	54	21	25	21	25	32
Frequency of Purchasing Groceries									
Several times per week	24	26	21	22	29	21	21	22	28
Once a week	52	52	53	46	45	59	57	52	56
2 to 3 times per month	20	19	22	30	22	15	19	22	17
Once a month	4	3	5	3	5	4	3	5	0
Mean times per month:	4.6	4.8	4.5	4.4	4.8	4.6	4.6	4.5	5.0
Groceries Purchase on a Regular Basis									
Fresh produce (fruits and vegetables)	91	89	92	91	90	89	94	89	96
Beef and/or poultry	88	91	85	89	90	89	85	88	88
Dairy milk	84	86	82	88	83	87	81	85	83
Fresh flowers	9	8	10	8	13	9	7	7	19

Shopping Habits

	Total US	Gender		Generation				Income	
		Male	Female	Gen Z	Millennials	Gen X	Boomers	Under $75K	$75K or More
Total US Respondents	(756)	(361)	(390)	(74)	(172)	(228)	(282)	(561)	(173)
	%	%	%	%	%	%	%	%	%
Typical Grocery Purchase Locations *									
Supermarket/Grocery Store	97	97	96	95	97	96	97	96	97
Mass Merchandiser	38	40	36	32	42	38	37	39	41
Warehouse Club	26	27	24	27	26	25	25	21	41
Dollar Store	25	28	21	31	31	25	13	28	14
Online retailer	18	20	17	19	29	13	12	18	22
Convenience Store	13	17	8	22	23	7	2	12	15
Farmer's Market/Farm Store	8	10	6	11	10	6	7	7	13
Drug Store	6	7	5	8	11	4	3	6	10

* Respondents had to purchase from a supermarket/grocery store and/or from an online retailer to qualify for this study.

Demographic Summary

		Gender		Generation				Income	
	Total US	Male	Female	Gen Z	Millennials	Gen X	Boomers	Under $75K	$75K or More
Total US Respondents	(756)	(361)	(390)	(74)	(172)	(228)	(282)	(561)	(173)
	%	%	%	%	%	%	%	%	%
Gender									
Male	49	100	-	49	50	52	43	47	54
Female	51	-	100	50	48	48	57	53	44
Non-binary	1	-	-	1	2	0	0	0	1
Generation									
Gen Z (18 - 26)	16	16	16	100	-	-	-	15	12
Millennials (27 - 42)	29	30	28	-	100	-	-	29	31
Gen X (43 - 58)	28	30	26	-	-	100	-	28	29
Boomers (59 - 78)	27	24	30	-	-	-	100	27	28
Mean Age:	46.8	46.3	47.4	22.4	36.1	51.2	68.0	47.1	47.4
Marital Status									
Married	30	28	31	5	28	35	41	22	60
Not Married	69	71	67	91	71	64	59	77	40
Employment Status									
Employed	46	56	36	51	62	50	19	41	64
Not Employed	54	43	63	46	38	48	80	58	36

Demographic Summary (Cont'd.)

		Gender		Generation				Income	
	Total US	Male	Female	Gen Z	Millennials	Gen X	Boomers	Under $75K	$75K or More
Total US Respondents	(756)	(361)	(390)	(74)	(172)	(228)	(282)	(561)	(173)
	%	%	%	%	%	%	%	%	%
				[Z]	[M]	[X]	[B]		
Education									
Less than high school	14	16	11	18	20	11	7	15	4
High school	46	42	50	70	41	43	40	51	31
College	40	42	39	12	38	46	53	34	65
Median Annual Household Income:	$41.7K	$43.4K	$40.0K	$36.5K	$42.5K	$40.7K	$44.5K	$31.7K	$107.5K
Region									
Northeast	19	18	21	19	17	17	24	18	24
South	45	46	43	50	48	45	38	47	37
Midwest	22	21	22	16	21	24	24	21	23
West	14	14	14	15	14	14	14	14	17
Live in Red vs. Blue States									
Red State	66	66	65	72	65	65	63	67	59
Blue State	34	34	35	28	35	35	37	33	41