



Numerator

MYTHBUSTERS

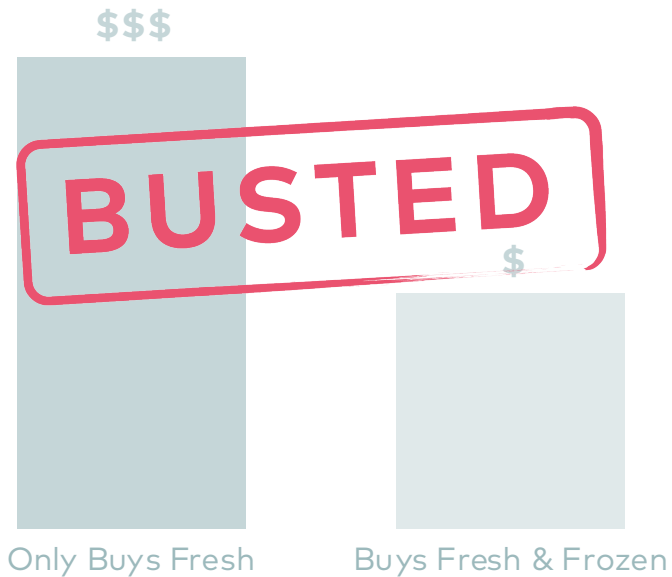
**"Frozen produce buyers spend
less on fresh produce."**

January 2020

MYTH

"Frozen produce buyers spend less on fresh produce."

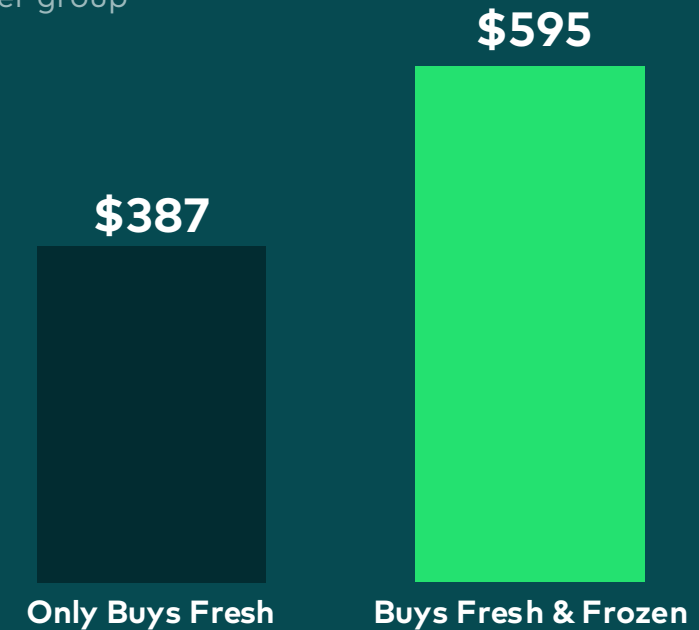
Fresh Produce Spend
by shopper group



TRUTH

Frozen produce buyers spend more on fresh produce.

Fresh Produce Spend
by shopper group

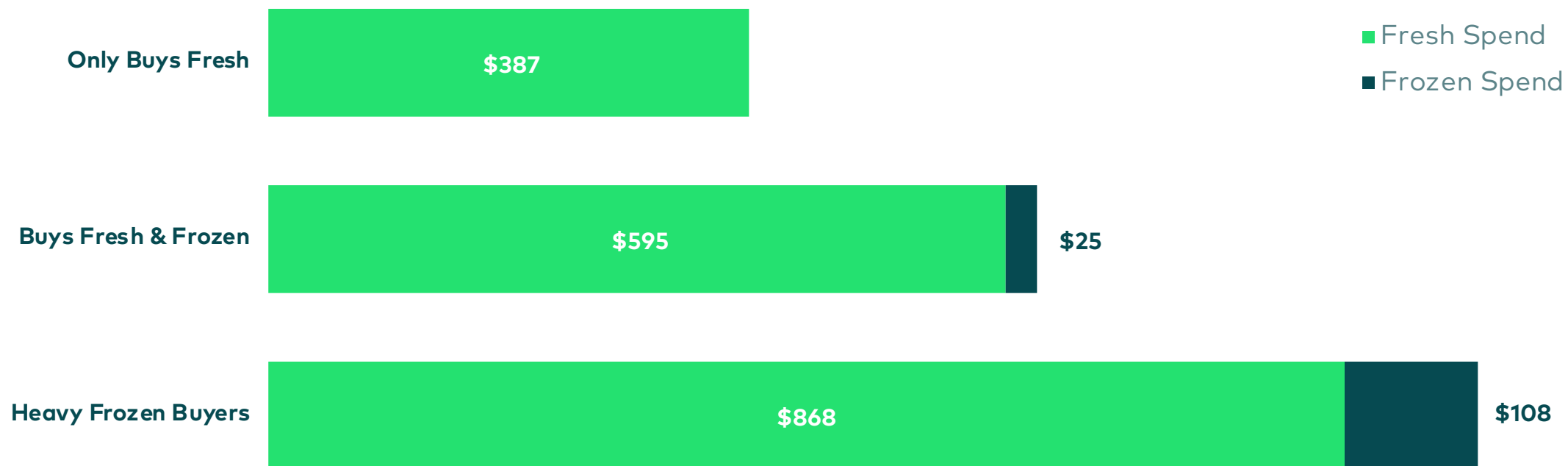


Frozen produce buyers spend 54% more on fresh produce than those who buy exclusively fresh.

And heavy buyers of frozen produce spend more than *twice* as much on fresh.

Fresh vs. Frozen Produce Spend

Annual Buy Rate by Group

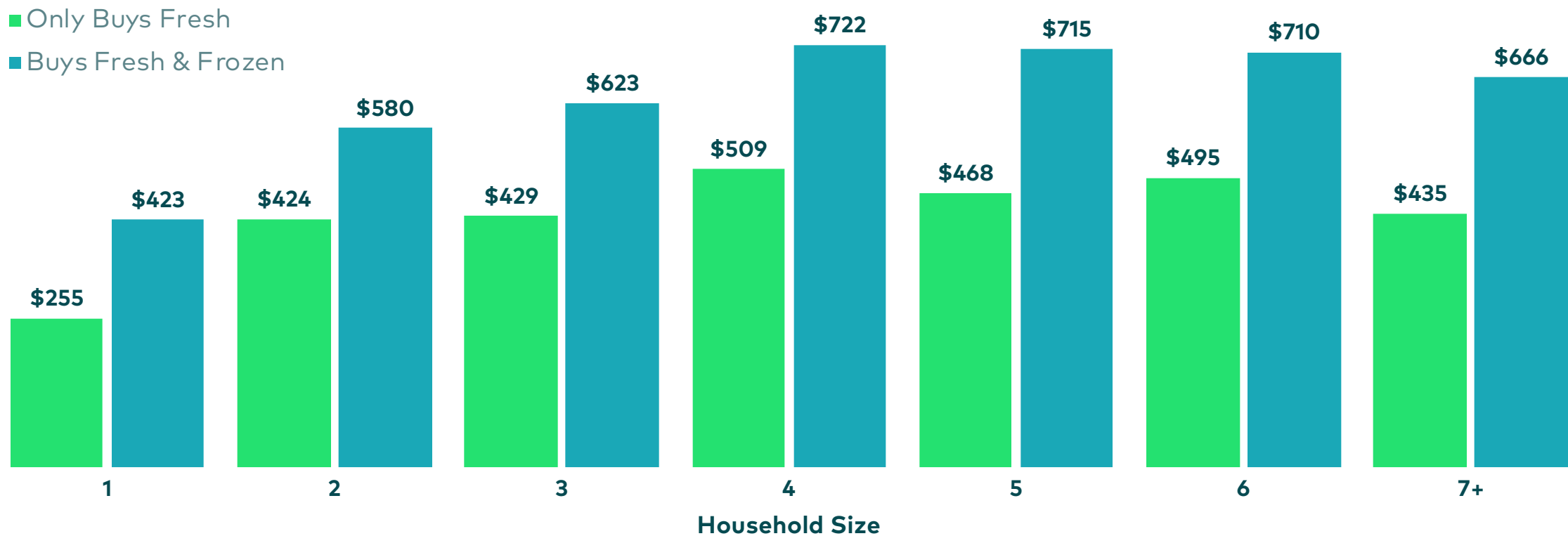


Larger household sizes did not explain the difference in spending.

A higher fresh spend was seen between groups even when household size remained constant.

Fresh Produce Spend

Annual Buy Rate by HH Size



This group's higher spend on produce overall is likely attributed to their focus on health.

Frozen produce buyers are more likely to be concerned with health & wellness than non-buyers.

Frozen Produce Buyer Psychographics

Index vs. "Fresh Only" Buyers



**Concerned With
Healthy Eating**

HHs: 59%, Index: 115



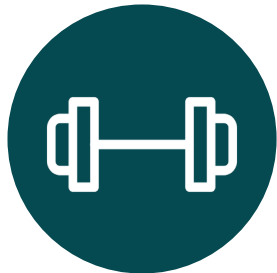
**Watches
Weight**

HHs: 31%, Index: 126



**Reviews
Nutrition Labels**

HHs: 34%, Index: 131



**Exercises
Regularly**

HHs: 28%, Index: 114



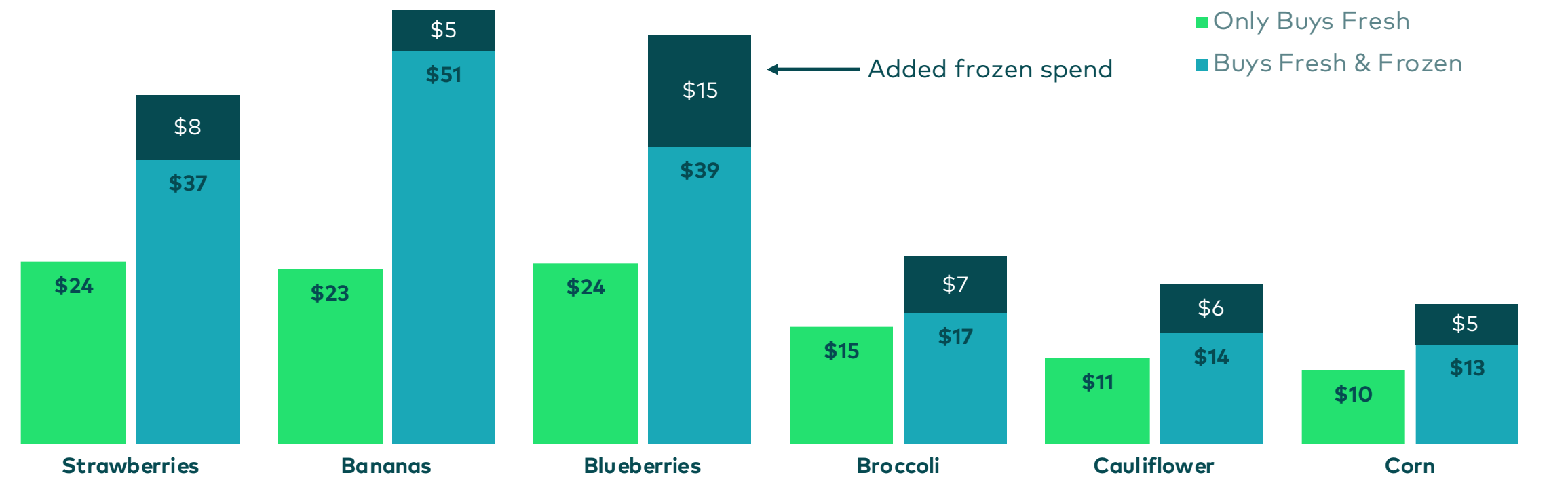
**Takes Vitamins
& Supplements**

HHs: 39%, Index: 125

The increased buy rate for fresh produce is more notable with fruits than it is with vegetables.

But across produce types, frozen dollars are incremental to an already heightened fresh spend.

Fresh Produce Spend
Annual Buy Rate by Produce Type

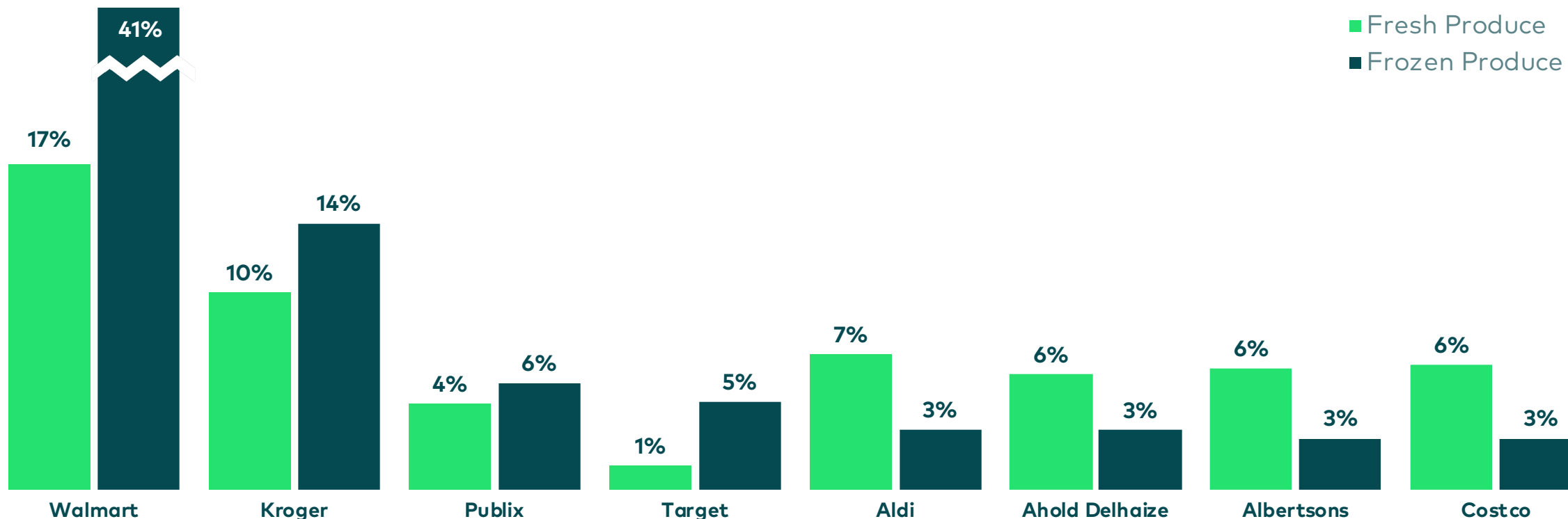


Consumers aren't spending their fresh and frozen produce dollars in the same place.

Retailers may be leaking produce dollars if they don't offer both fresh and frozen options.

Top Retailers for Fresh & Frozen Produce

Share of Wallet



**Frozen produce
doesn't replace
fresh produce**

**...and those who buy frozen produce
are **more valuable** to the produce
category as a whole.**

Questions we can help to answer:

- Who is my typical shopper and what are the best ways for me to identify their preferences and needs?
- How can I optimize my assortment to prevent leaked trips and dollars?
- What else are shoppers buying when they don't choose my brand or products?

Any other myths you want us to bust?
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