

Removing Fruit & Vegetable Consumption Barriers Through Policy & Societal Change

BY MILKEN INSTITUTE
COMMUNITY EXPLORER PROFILES

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Benefits of Partnering with IFPA for produce industry research

Clear Actionable Insights tying together complex data sets into industry ready content

Knowledgeable Experts building a story to support your initiatives

Integrated and Consistent Data bringing a clear and consistent view







IFPA worked with Circana to leverage data from the Milken

Institute to better understand produce consumption for different demographic groups with the goal of using the data to effectively remove consumption barriers through policy and societal change.







Milken Communities

Urban America

74% of the US population

819 urban metro counties.

I-Urban Core = Prosperous, ethnically and linguistically diverse large metro areas with substantial disparities between their highly educated (largely White) and less educated (largely Black or African American) residents (26 percent of the population)

2-Lower-Middle Class = Less populous suburban and small metro counties that are not as economically prosperous as the rest of Urban America (18 percent of the population)

3-Affluent Suburbs = Affluent and more populous (but less diverse) suburban and small metro counties that jointly represent the profile with the highest median income (16 percent of the population)

4-Middle Class = Middle-class communities with a largely White population that resides in large- to medium-sized suburban and small metro counties (14 percent of the population)

Industry-Driven America

17% of the US population

1,507 counties where employment is concentrated in one industry.

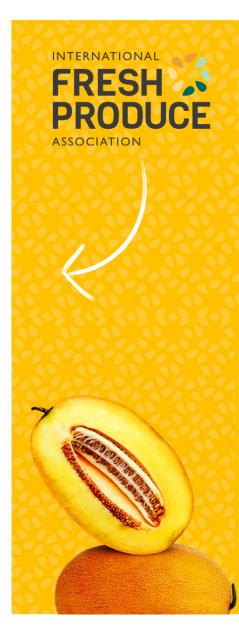
5-College Towns = College towns with a relatively young, highly educated, and highly geographically mobile population (5.4 percent of the population)

6-Manufacturing Midwest = Counties primarily located in the Midwest that form the profile with the highest proportion of White population working in the manufacturing sector (5.2 percent of the population)

7-Low-Wage Manufacturing = Low-wage workers in the manufacturing and chemical industries located largely in the South and Northeast regions of the country, with an above-average proportion of the population living below the poverty line (4.9 percent of the population)

11-Hispanic Agriculture = Highly agricultural communities with a higher than average concentration of Hispanic or Latino population residing mostly in the West and South (1.2 percent of the population)

15-The Great Plains = Agricultural counties located in the Great Plains with a high proportion of the White population (0.3 percent of the population)



Milken Communities

Extremely Vulnerable America

3.5% of the US population

378 counties that represent the profile with the lowest levels of income.

9-Hispanic Southern Border = Counties mostly located along the US southern border with a majority of a relatively young Hispanic or Latino population living in extreme poverty (1.4 percent of the population)

10-Black South = Southern counties with the highest proportion of Black or African American population and lowest median household income of all profiles (1.3 percent of the population)

12-White Appalachia = White communities in Appalachia with the third-highest level of unemployment rates and second-lowest household income of all profiles (0.7 percent of the US population)

16-American Indian Reservations = American Indian Reservation communities living in extreme poverty with more than one-third of the population with income below the poverty line (0.1 percent of the population)

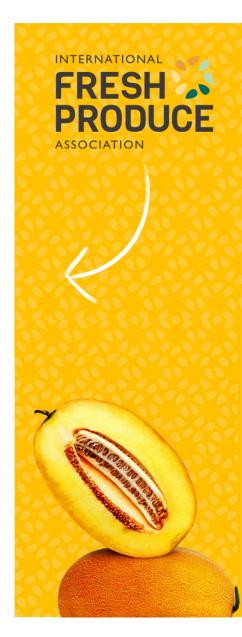
Graying America

5.1% of the US population

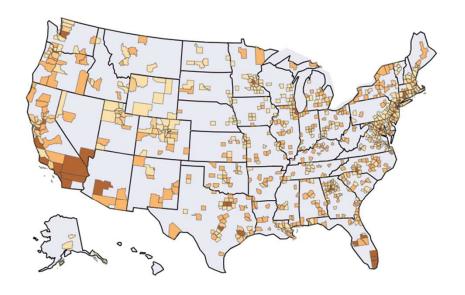
424 counties that represent the highest concentration of population age 65 years or older.

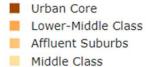
8-Retiree Communities = Retiree communities with adequate household incomes and access to economic resources (4.5 percent of the population)

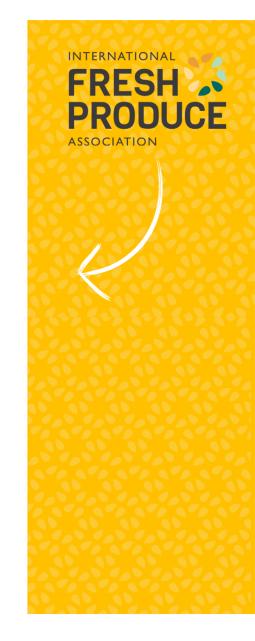
13-Isolated Seniors = Isolated seniors with high disability rates and relatively low incomes (0.6 percent of the population)



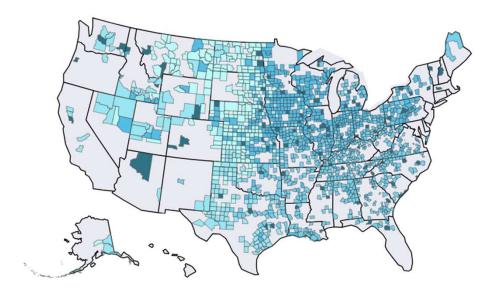
Urban America







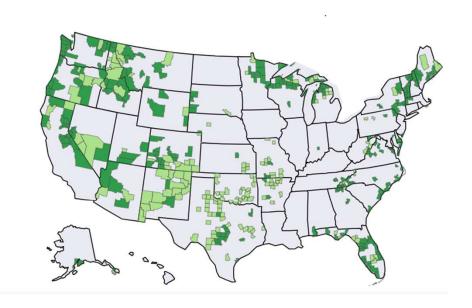
Industry Driven America



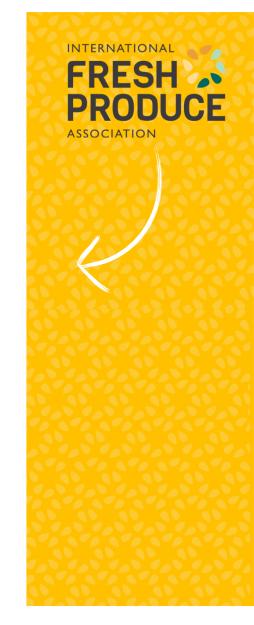
- College Towns
- Manufacturing Midwest
- Low-Wage Manufacturing
- Hispanic Agriculture
- The Great Plains



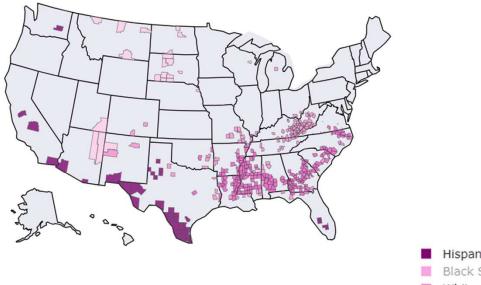
Graying America



Retiree Communities **Isolated Seniors**



Extremely Vulnerable America

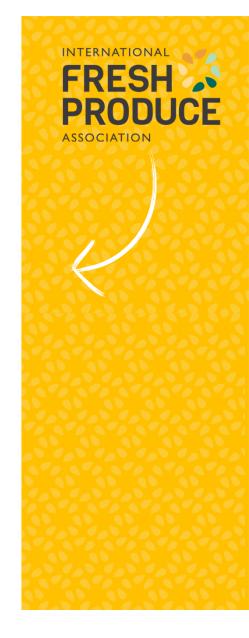




Black South

White Appalachia

American Indian Reservations



						% Fruit \$			Cost per lb.
Urban Core	25%	High	18%	21%	23%	25%	.14%	.86%	\$2.01V \$1.75F
Affluent Suburbs	18%	High	12%	17%	19%	20%	74%	.73%	\$2.15V \$1.81F
Middle Class	13%	High	15%	16%	16%	16%	.44%	1.55%	\$2.00V \$1.70F
Hispanic Ag	1.2%	Mid	1%	1.09%	.97%	.97%	2.01%	2.96%	\$1.62V \$1.48F
Retirees	4%	Mid	6%	6%	7%	6%	2.09%	2.63%	\$2.07V 1.80F
Manufacturing Midwest	5%	Mid	7%	5%	4%	4%	.93%	2.16%	\$1.81V \$1.51F
Great Plains	.26%	Mid	.2%	.05%	.03	.03	8.22%	4.30%	\$1.80V \$1.49F
Lower Middle Class	18%	Mid/Low	22%	20%	19%	18%	.67%	1.93%	\$1.86V \$1.61F
College Towns	5%	Mid/Low	6%	6%	6%	6%	72%	.99%	\$2.03V \$1.71F
Low wage Manu	5%	Mid/low	8%	4%	3%	3%	2.36%	2.96%	\$1.66V \$1.40F
Hisp Southern Border	1.33%	Mid/Low	1%	1.2%	.91%	1.01%	1.15%	2.65%	\$1.53V \$1.93F
American Indians	.69%	Mid/Low	.2%	.10%	.09%	.09%	2.44%	-1.026%	\$1.42V \$1.52F
Black South	1.23%	Mid/Low	1%	1%	.71%	.67%	2.95%	2.96%	\$1.61V \$1.37V
Isolated Seniors	.63%	Low	1%	.51%	.43%	.37%	2.04%	1.06%	\$1.70V \$1.52F
White Appalachia	.69%	Low	.69%	.54%	.38%	.35%	.30%	.41%	\$1.60V \$1.39F





Situation:

Total volume of veggies decreased .70% 2022 to 2023

Total volume of fruit increased .40% 2022 to 2023

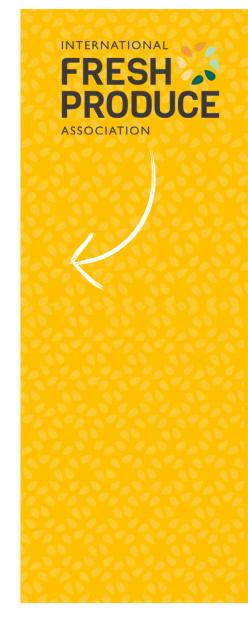
CALL TO ACTION:

Increasing the sales of veggies and fruits

POSSIBLE IMPACT:

Increasing annual spend per capita of segments that under index to \$103.95 on veggies and \$105.47 on fruit would mean a \$2.185B increase in sales on veggies and \$2.387 B increase in sales on fruit

Increasing annual volume per capita of segments that under index to 51 lbs of veggies and 59 pounds of fruit would mean an additional 801M lbs in sales on veggies and 1.054B lbs on fruit



Produce Champions

SEGMENTS:

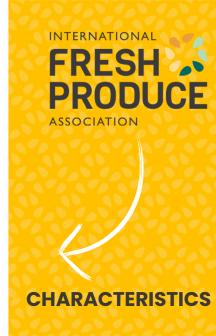
Urban Core
Affluent Suburbs

OPPORTUNITY:

- Increase retailer access
- Offer high-quality produce
- Become health partner
- Offer unique items

CONSIDERATIONS:

- 1. Offer Convenience: Make it easy for customers to access and purchase fruits and vegetables by offering pre-cut or pre-packaged produce, ready-to-eat fruit cups, or grab-and-go vegetable snacks.
- **2. Variety and Seasonality**: Highlight seasonal availability to keep offerings fresh and enticing.
- 3. **Promote Meal Solutions**: Showcase fruits and vegetables as versatile ingredients for creating delicious and healthy meals. Provide recipe ideas, cooking tips, and meal prep inspiration. Consider offering meal kits or recipe bundles.
- **4. Partner with Influencers and Health Experts**: Collaborate with nutritionists, dietitians, and health influencers who have a strong influence within these segments.
- **5. Offer Sampling and Tastings**: Allow customers to sample different fruits and vegetables to experience their flavors and textures firsthand.



- Veggie & Fruit purchases index higher than food purchases
- Highest spend of all segment per lb for produce
- Under index in access to stores

12

Food Champions

SEGMENTS:

Middle Class
Retirees
Lower Middle Class
College Towns

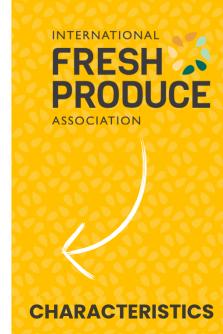
OPPORTUNITY:

Become a food partner Offer versatile items

Become a health partner

CONSIDERATIONS:

- **1. Targeted Marketing**: Craft marketing messages that resonate with the values and interests of the segments in question.
- **2. In-Store Experience**: Create an inviting and visually appealing display of fruits and vegetables in your store. Consider offering samples and demonstrations.
- **3. Convenience and Accessibility**: Make it easy for customers to purchase fruits and vegetables by offering convenient options such as pre-cut, pre-packaged, or ready-to-eat varieties.
- **4. Educational Content**: Provide educational content about the nutritional benefits and versatility of fruits and vegetables; including recipe ideas, cooking tips, nutritional information, and guides on selecting and storing produce.
- **5. Community Engagement**: Engage with the community through events, workshops, or partnerships that promote healthy eating and local produce.
- **6. Online Presence**: Leverage your online presence to showcase your selection of fruits and vegetables and reach customers beyond your physical location.



 Over index on food purchase, fruit & veggies purchases, and access to retail outlets.

Needing a nudge

SEGMENT:

Manufacturing Mid west

OPPORTUNITY:

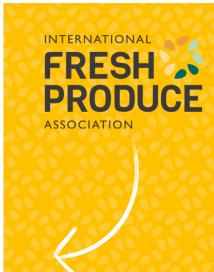
Increase retailer access

Become a health partner

Offer versatile items

CONSIDERATIONS

- **1. Highlight Health Benefits**: Emphasize the nutritional value and health benefits of fruits and vegetables in your marketing materials.
- Offer Fresh and Seasonal Variety: Keep your inventory stocked with a diverse selection of fresh fruits and vegetables, focusing on seasonal options.
- **2. Create Appealing Displays**: Arrange your fruits and vegetables in visually appealing displays that catch the eye of shoppers.
- **3. Provide Sampling Opportunities**: Offer samples of ripe or in-season fruits and vegetables to allow customers to taste the quality and freshness of your produce.
- **4. Offer Convenience**: Make it convenient for customers to purchase fruits and vegetables by offering pre-cut, pre-packaged, or ready-to-eat options
- **5. Educate Customers**: Provide educational resources and cooking tips to help customers incorporate more fruits and vegetables into their diets.
- **6. Promote Locally Sourced and Organic Options**: Highlight locally sourced or organic fruits and vegetables to appeal to customers who prioritize sustainability and environmental responsibility.
- Cross-Promote with Other Departments: Collaborate with other departments in your store to cross-promote fruits and vegetables with complementary products.



CHARACTERISTICS

- Index correctly on food but under index on purchases on veggies and fruits
- Under index on access to stores

Struggling

SEGMENTS:

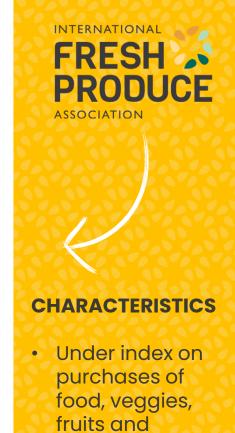
Hispanic Agriculture
The Great Plains
Low Wage Manufacturing
Hispanic Southern Border
American Indian Reservations
Black South
Isolated Seniors
White Appalachia

OPPORTUNITY:

Increase retailer access
Become a food partner
Offer versatile items

CONSIDERATIONS:

- **1.Menu Engineering**: Demonstrate incorporating fruits and vegetables in creative and appealing ways.
- **2.Visual Merchandising**: Create visually appealing displays of fruits and vegetables in your store.
- **3.Promotions and Specials**: Offer promotions, discounts, or meal deals that feature fruits and vegetables prominently.
- **4.Cross-Promotion**: Cross promote fruits and vegetable with center of store items.
- **5.Educational Events**: Host cooking demonstrations, workshops, or tasting events that focus on fruits and vegetables.
- **6.Partnerships and Sponsorships**: Partner with local schools, hospitals, or community organizations to promote healthy eating initiatives.
- **7.Employee Training and Engagement**: Train your staff to be knowledgeable about the fruits and vegetables you offer.



access to stores

Urban Core



Under index

fruit & veggie purchases
of stores

Slight increase volume 22-23

Per Capita Spend

\$84.79 Veggie/\$2.01 per lb \$94.22 Fruit/1.75 per lb

Per Capital Volume

42 lbs Veggie 54 lbs Fruit

Change in volume from 2022 to 2023

.14% Veggie .86% Fruit

11,151 Stores selling produce

8 Stores per 1000 people

18% of retail outlets

Average Dollars per store for Veggies: \$1.140M Average Dollars per store for Fruit: \$1.036M

25% OF POPULATION = 84.2M

24% TOTAL PRODUCE VOLUME22% TOTAL VEGGIE VOLUME24% TOTAL FRUIT VOLUME

24% TOTAL PRODUCE DOLLARS23% TOTAL VEGGIE DOLLARS25% TOTAL FRUIT DOLLARS

Affluent Suburbs



Over index

fruit & veggie purchases

Under index

of stores

Slight decrease veggie volume; Slight increase fruit volume 22-23

Per Capita Spend

\$98.32 Veggie/\$2.15 per lb \$104.56 Fruit/\$1.81 per lb

Per Capita Volume

46 lbs Veggie 56 lbs Fruit

Change in volume from 2022 to 2023

-.74% Veggie .73% Fruit

7,921 Stores selling produce

8 Stores per 1000 people

12% of retail outlets

Average Dollars per store for Veggies: \$1.209M

Average Dollars per store for Fruit: \$1.098M

18% OF POPULATION = 59.6M

18% TOTAL PRODUCE VOLUME
17% TOTAL VEGGIE VOLUME
18% TOTAL FRUIT VOLUME

19% TOTAL PRODUCE DOLLARS
19% TOTAL VEGGIE DOLLARS
20% TOTAL FRUIT DOLLARS



Lower Middle Class



Over index

fruit & veggie purchases
of stores

Slight increase veggie volume; Increase in fruit 22-23 **Per Capita Spend**

\$98.24 Veggie/\$1.86 per lb \$98.31 Fruit/\$1.61 per lb

Per Capita Volume

53 lbs Veggie 61 lbs Fruit

Change in volume from 2022 to 2023

.67% Veggie 1.93% Fruit

14,131 Stores selling produce

4 Stores per 1000 people

22% of retail outlets

Average Dollars per store for Veggies: \$545K

Average Dollars per store for Fruit: \$646K

18% OF POPULATION = 59.2M

19% TOTAL PRODUCE VOLUME
20% TOTAL VEGGIE VOLUME
19% TOTAL FRUIT VOLUME

18% TOTAL PRODUCE DOLLARS
19% TOTAL VEGGIE DOLLARS
18% TOTAL FRUIT DOLLARS

Middle Class



Over index

fruit & veggie purchases # of stores

Slight increase veggie volume; Increase fruit volume 22-23

Per Capita Spend

\$113.87 Veggie/\$2.00 per lb \$111.94 Fruit/\$1.70 per lb

Per Capita Volume

57 lbs Veggie 66 lbs Fruit

Change in volume from 2022 to 2023

.44% Veggie 1.55% Fruit

9,349 Stores selling produce

5 per 1000 people

15% of retail outlets

Average Dollars per store for Veggies: \$716K

Average Dollars per store for Fruit: \$740K

13% OF POPULATION = 44.6M

16% TOTAL PRODUCE VOLUME
16% TOTAL VEGGIE VOLUME
15% TOTAL FRUIT VOLUME

16% TOTAL PRODUCE DOLLARS16% TOTAL VEGGIE DOLLARS16% TOTAL FRUIT DOLLARS

College Towns



Over-index

fruit & veggie purchases
of stores

Down veggie volume; Increase fruit volume 22-23

Per Capita Spend

\$114.85 Veggie/\$2.03 per lb \$114.32 Fruit/\$1.71 per lb

Per Capita Volume

57lbs Veggie 67lbs Fruit

Change in volume from 2022 to 2023

-72% Veggie .99% Fruit

3,517 Stores selling produce

5 Stores per 1000 people

6% of retail outlets

Average Dollars per store for Veggies: \$841K

Average Dollars per store for Fruit: \$843K

5% OF POPULATION = 17.4M

6% TOTAL PRODUCE VOLUME

6% TOTAL VEGGIE VOLUME

6% TOTAL FRUIT VOLUME

6% TOTAL PRODUCE DOLLARS

6% TOTAL VEGGIE DOLLARS

6% TOTAL FRUIT DOLLARS

Manufacturing Midwest



Under-index

fruit & veggie purchases Over index

of stores

Up veggie & fruit volume 22-23

Per Capita Spend

\$72.94 Veggie/\$1.81 per lb \$67.13 Fruit/\$1.51 per lb

Per Capita Volume

40lbs Veggie 45lbs Fruit

Change in volume from 2022 to 2023

.93% Veggie

2.16% Fruit

4,241 Stores selling produce

4 stores per 1000 people

7% of retail outlets

Average Dollars per store for Veggies: \$334K

Average Dollars per store for Fruit: \$486K

5% OF POPULATION = 17M

4% TOTAL PRODUCE VOLUME

4% TOTAL VEGGIE VOLUME

4% TOTAL FRUIT VOLUME

4% TOTAL PRODUCE DOLLARS

4% TOTAL VEGGIE DOLLARS

4% TOTAL FRUIT DOLLARS



Low-wage Manufacturing



Under-index

fruit & veggie purchases

Over index

of store

Up veggie & fruit volume 22-23

Per Capita Spend

\$67.20 Veggie/\$1.66 per lb \$58.98 Fruit/\$1.40 per lb

Per Capita Volume

40lbs Veggie 42lbs Fruit

Change in volume from 2022 to 2023

2.36% Veggie 2.96% Fruit

4.868 Stores selling produce

3 stores per 1000 people 8% of retail outlets

Average Dollars per store for Veggies: \$222K Average Dollars per store for Fruit: \$346K

5% OF POPULATION = 15.9M

4% TOTAL VEGGIE VOLUME

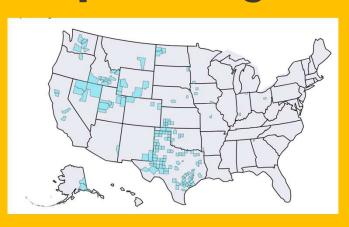
4% TOTAL FRUIT VOLUME

4% TOTAL PRODUCE DOLLARS

3% TOTAL VEGGIE DOLLARS

3% TOTAL FRUIT DOLLARS

Hispanic Agriculture



Under-index fruit & veggie purchases

Up veggie & fruit volume 22-23

Per Capita Spend

\$75.71 Veggie/\$1.62 per lb \$77.54 Fruit/\$1.48 per lb

Per Capita Volume

47lbs Veggie 52lbs Fruit

Change in volume from 2022 to 2023

2.01% Veggie2.96% Fruit

882 Stores selling produce

5 per 1000 people

1% of retail outlets

Average Dollars per store for Veggies: \$400K

Average Dollars per store for Fruit: \$493K

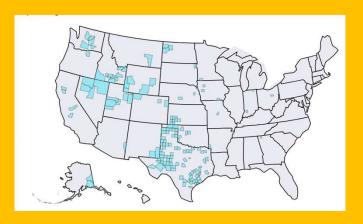
1.2% OF POPULATION = 4M

1.1% TOTAL PRODUCE VOLUME
1.2% TOTAL VEGGIE VOLUME
1.1% TOTAL FRUIT VOLUME

.96% TOTAL PRODUCE DOLLARS
.97% TOTAL VEGGIE DOLLARS
.97% TOTAL FRUIT DOLLARS



The Great Plains



Under-index fruit & veggie purchases

Up veggie & fruit volume 22-23

Per Capita Spend

\$11.23 Veggie/\$1.80 per lb \$11.69 Fruit/\$1.49 per lb

Per Capita Volume

6 lbs Veggie

8 lbs Fruit

Change in volume from 2022 to 2023

8.22% Veggie

4.30% Fruit

111 Stores selling produce

7 stores per 1000 people

.2% of retail outlets

Average Dollars per store for Veggies: \$110K

Average Dollars per store for Fruit: \$163K

.26% OF POPULATION = 854K

.03% TOTAL PRODUCE VOLUME

.03% TOTAL VEGGIE VOLUME

.04% TOTAL FRUIT VOLUME

.03% TOTAL PRODUCE DOLLARS

.03% TOTAL VEGGIE DOLLARS

.03% TOTAL FRUIT DOLLARS

Retiree Communities



Over index

fruit & veggie purchases
of stores

Up veggie & fruit volume 22-23

Per Capita Spend

\$141.89 Veggie/\$2.07 per lb \$137.36 Fruit/\$1.80 per lb

Per Capita Volume

69 lbs Veggie 76 lbs Fruit

Change in volume from 2022 to 2023

2.09% Veggie 2.63% Fruit

3,823 Stores selling produce

4 stores per 1000 people

6% of retail outlets

Average Dollars per store for Veggies: \$663

Average Dollars per store for Fruit:

4% OF POPULATION = 14.8M

6% TOTAL PRODUCE VOLUME

6% TOTAL VEGGIE VOLUME

6% TOTAL FRUIT VOLUME

7% TOTAL PRODUCE DOLLARS

7% TOTAL VEGGIE DOLLARS

6% TOTAL FRUIT DOLLARS

\$704K



Isolated Seniors



Under index

fruit & veggie purchases

Over index

of stores

Up veggie & fruit volume 22-23

Per Capita Spend

\$64.90 Veggie/\$1.70 per lb \$57.23 Fruit/\$1.52 per lb

Per Capita Volume

38 lbs Veggie 38 lbs Fruit

Change in volume from 2022 to 2023

2.04% Veggie 1.06% Fruit

613 Stores selling produce

3 per 1000 people

1% of retail outlets

Average Dollars per store for Veggies: \$210K

\$273K

Average Dollars per store for Fruit:

.63% OF POPULATION = 2.0M

.45% TOTAL PRODUCE VOLUME

.50% TOTAL VEGGIE VOLUME

.41% TOTAL FRUIT VOLUME

.40% TOTAL PRODUCE DOLLARS

.43% TOTAL VEGGIE DOLLARS

.37% TOTAL FRUIT DOLLARS

Hispanic Southern Border



Under index

fruit & veggie purchases

Over index

of stores

Up veggie & fruit volume 22-23

Per Capita Spend

\$65.02 Veggie/\$1.53 per lb \$73.56 Fruit/\$1.93 per lb

Per Capita Volume

42 lbs Veggie 53 lbs Fruit

Change in volume from 2022 to 2023

1.15% Veggie 2.65% Fruit

940 Stores selling produce

5 per 1000 people

1% of retail outlets

Average Dollars per store for Veggies: \$287K

Average Dollars per store for Fruit: \$273K

1.33% OF POPULATION = 4.4M

1.2% TOTAL PRODUCE VOLUME
1.17% TOTAL VEGGIE VOLUME
1.23% TOTAL FRUIT VOLUME

.96% TOTAL PRODUCE DOLLARS.91% TOTAL VEGGIE DOLLARS1.01% TOTAL FRUIT DOLLARS



Black South



Under index

fruit & veggie purchases

Over index

of stores

Up veggie & fruit volume 22-23

Per Capita Spend

\$55.08 Veggie/\$1.61 per lb \$52.98 Fruit/\$1.37 per lb

Per Capita Volume

34 lbs Veggie 39 lbs Fruit

Change in volume from 2022 to 2023

2.95% Veggie2.96% Fruit

1,322 Stores selling produce

3 per 1000 people

2% of retail outlets

Average Dollars per store for Veggies: \$135K Average Dollars per store for Fruit: \$241K

1.23% OF POPULATION = 4.0M

.84% TOTAL PRODUCE VOLUME

.87% TOTAL VEGGIE VOLUME

.83% TOTAL FRUIT VOLUME

.69% TOTAL PRODUCE DOLLARS

.71% TOTAL VEGGIE DOLLARS

.67% TOTAL FRUIT DOLLARS

White Appalachia



Under index fruit & veggie purchases

Up veggie & fruit volume 22-23

Per Capita Spend

\$52.60 Veggie/\$1.60 per lb \$45.22 Fruit/\$1.39 per lb

Per Capita Volume

33 lbs Veggie 32 lbs Fruit

Change in volume from 2022 to 2023

.30% Veggie

703 Stores selling produce

3 per 1000 people

1% of retail outlets

Average Dollars per store for Veggies: \$149K

Average Dollars per store for Fruit: \$246K

.69% OF POPULATION = 2.2M

.43% TOTAL PRODUCE VOLUME

.47% TOTAL VEGGIE VOLUME

.39% TOTAL FRUIT VOLUME

.35% TOTAL PRODUCE DOLLARS

.38% TOTAL VEGGIE DOLLARS

.32% TOTAL FRUIT DOLLARS

American Indian Reservations



Under index

fruit & veggie purchases

Over index

of stores

Up veggie & down fruit volume 22-23

Per Capita Spend

\$70.54 Veggie/\$1.42 per lb

\$70.61 Fruit/\$1.52 per lb

Per Capita Volume

50 lbs Veggie

47 lbs Fruit

Change in volume from 2022 to 2023

2.44% Veggie

-1.26% Fruit

109 Stores selling produce

4 per 1000 people

.2% of retail outlets

Average Dollars per store for Veggies: \$233K

Average Dollars per store for Fruit: \$235K

.12% OF POPULATION = 399K

.11% TOTAL PRODUCE VOLUME

.12% TOTAL VEGGIE VOLUME

.10% TOTAL FRUIT VOLUME

.09% TOTAL PRODUCE DOLLARS

.09% TOTAL VEGGIE DOLLARS

.09% TOTAL FRUIT DOLLARS

