



FRESH MUSHROOM ENGAGEMENT

**A look at household penetration, trips
and spending as of Q1 2024**





Mushroom Household Penetration at Retail

Mushrooms have experienced an erosion in household penetration over the past few years. Household penetration reflects the share of households that have purchased fresh mushrooms in the produce department at least once in the past year. The total share of mushroom-consuming households is likely bigger, when taking into account mushrooms included in kabobs, deli-prepared dishes or stuffed mushrooms sold through the deli or meat departments.

Across all retail outlets, 48.9% of consumers purchase fresh mushrooms at least once. This is down about 1% versus last year, but down 5.3% from three years ago.

- White mushrooms have the highest household penetration but also the most erosion.
- Crimini/brown mushrooms have the second-highest household penetration with the share holding relatively steady over the past few years. This goes hand-in-hand with a rising share of dollars/volume as well. However, it's important to note that assortment of crimini/brown has also increased.
- Portabellas are purchased by just below 10% of households
- Shiitake have the highest penetration of the small varieties, at 2.8%. However, it is likely that exotic mushrooms are purchased through other outlets that go unmeasured such as farmers' markets, specialty stores, etc.

Product	% HH Buying	% HH Buying Change vs YA	% HH Buying Change vs 2 YA	% HH Buying Change vs 3 YA
Produce department	99.0%	0.0%	0.0%	-0.2%
Fresh cooking vegetables	90.2%	0.0%	-0.7%	-1.4%
Fresh mushrooms	48.9%	-1.0%	-2.8%	-5.3%
White fresh mushrooms	36.2%	-1.0%	-3.1%	-5.3%
Crimini/brown fresh mushrooms	24.8%	-0.1%	0.0%	-1.4%
Portabella fresh mushrooms	9.5%	-0.9%	-2.3%	-4.0%
Random weight fresh mushrooms	7.7%	-0.7%	-1.5%	-3.0%
Shiitake fresh mushrooms	2.8%	-0.3%	-0.5%	-0.6%
All other fresh mushrooms	1.3%	-0.1%	-0.4%	-0.7%
Oyster fresh mushrooms	0.5%	-0.1%	0.0%	-0.1%

Source: Circana , Integrated Fresh Household Panel, all outlets, 52 weeks ending 4/21/2024

Mushroom Trips per Buyer (at Retail)

While the total produce department is experiencing an increase in the number of times consumers purchase fresh fruit and vegetables, mushroom trips have been flat over the past year, and are down compared to two and three years ago.

- Consumers who buy mushrooms, buy them an average of nearly eight times per year.
- The trip pressure is primarily driven by white mushrooms.
- Crimini/brown mushrooms have seen an increase in trips over all three years.
- Portabella and shiitake are other mushroom types with an increase in the purchase frequency.

Product	Product Trips per Buyer	Product Trips per Buyer Change vs YA	Product Trips per Buyer % Change vs YA	Product Trips per Buyer Change vs 2 YA	Product Trips per Buyer % Change vs 2 YA	Product Trips per Buyer Change vs 3 YA	Product Trips per Buyer % Change vs 3 YA
Produce department	84.1	+1.4	+1.7%	+3.2	+3.9%	+5.2	+6.6%
Fresh cooking vegetables	21.5	+0.3	+1.2%	+0.7	+3.2%	0.0	0.0%
Fresh mushrooms	7.9	0.0	0.0%	-0.2	-2.0%	-0.5	-6.3%
White fresh mushrooms	5.7	0.0	-0.4%	-0.1	-2.1%	-0.4	-7.3%
Crimini/brown fresh mushrooms	4.7	+0.1	+1.2%	+0.2	+3.4%	+0.1	+2.9%
Portabella fresh mushrooms	3.4	+0.1	+3.4%	0.0	-0.6%	+0.1	+4.3%
Shiitake fresh mushrooms	3.2	+0.2	+6.2%	+0.4	+14.9%	+0.2	+6.8%
All other fresh mushrooms	2.2	+0.3	+15.8%	+0.2	+10.4%	0.0	-0.4%
Random weight fresh mushrooms	2.1	+0.0	+1.4%	+0.1	-4.0%	-0.1	-4.7%
Oyster fresh mushrooms	1.7	+0.1	+7.6%	+0.1	+4.5%	-0.7	-28.8%

Source: Circana , Integrated Fresh Household Panel, all outlets, 52 weeks ending 4/21/2024



Mushroom Dollars per Trip (at Retail)

Fresh mushroom spending per trip is relatively flat. Longer-term, there is a bit of an increase, but this reflects inflation.

- On average, shoppers spend \$3.26 on mushroom per buying visit.
- The amount is highest for “all other” which includes many of the specialty varieties.
- Crimini is also an above-average spend, at \$3.70 versus \$2.87 for white mushrooms.

Product	Dollars per Trip	Dollars per Trip Change vs YA	Dollars per Trip % Change vs YA	Dollars per Trip Change vs 2 YA	Dollars per Trip % Change vs 2 YA	Dollars per Trip Change vs 3 YA	Dollars per Trip % Change vs 3 YA
Dept-produce	\$8.96	+\$0.06	+0.6%	+\$0.25	+2.9%	+\$0.44	+5.1%
Fresh cooking vegetables	\$3.13	-\$0.01	-0.4%	+\$0.19	+6.5%	+\$0.26	+9.2%
Fresh mushrooms	\$3.26	-\$0.01	-0.2%	+\$0.14	+4.5%	+\$0.22	+7.2%
All other fresh mushrooms	\$5.56	+\$0.49	+9.7%	+\$0.97	+21.2%	+\$1.65	+42.3%
Crimini/brown fresh mushrooms	\$3.70	-\$0.01	-0.4%	+\$0.13	+3.5%	+\$0.24	+7.1%
Oyster fresh mushrooms	\$5.00	+\$0.43	+9.4%	-\$0.03	-0.6%	+\$1.58	+46.3%
Portabella fresh mushrooms	\$3.00	-\$0.12	-4.0%	-\$0.06	-1.9%	+\$0.06	+2.0%
Random weight fresh mushrooms	\$2.93	+\$0.04	+1.4%	+\$0.22	+8.1%	+\$0.28	+10.7%
Shiitake fresh mushrooms	\$5.90	+\$0.03	+0.4%	+\$0.35	+6.3%	+\$0.35	+6.3%
White fresh mushrooms	\$2.87	-\$0.03	-1.0%	+\$0.12	+4.2%	+\$0.16	+6.0%

Source: Circana , Integrated Fresh Household Panel, all outlets, 52 weeks ending 4/21/2024

Mushroom Units per Trip (at Retail)

Most mushroom buying trips include one package/unit of mushrooms per visit. Because of this, the changes over time are miniscule when measured in trips, but reflect larger percentage increases or decreases regardless.

Product	Unit Sales per Trip	Unit Sales per Trip Change vs YA	Unit Sales per Trip % Change vs YA	Unit Sales per Trip Change vs 2 YA	Unit Sales per Trip % Change vs 2 YA	Unit Sales per Trip Change vs 3 YA	Unit Sales per Trip % Change vs 3 YA
Dept-produce	3.1	0.0	-0.9%	-0.1	-4.1%	-0.3	-8.1%
Fresh cooking vegetables	1.3	0.0	0.1%	0.0	-1.2%	0.0	-2.8%
Fresh mushrooms	1.2	0.0	1.1%	0.0	0.0%	0.0	-1.3%
All other fresh mushrooms	1.3	+0.1	6.7%	0.0	2.2%	0.0	-0.5%
Crimini/brown fresh mushrooms	1.1	0.0	0.0%	0.0	-1.5%	0.0	-2.6%
Oyster fresh mushrooms	1.2	+0.1	5.7%	-0.1	-4.2%	-0.3	-20.9%
Portabella fresh mushrooms	1.3	0.0	3.6%	0.0	3.2%	0.0	2.7%
Random weight fresh mushrooms	1.1	0.0	0.1%	0.0	0.0%	0.0	-0.2%
Shiitake fresh mushrooms	1.2	0.0	0.3%	0.0	1.1%	-0.1	-5.1%
White fresh mushrooms	1.2	0.0	1.2%	0.0	0.8%	-0.0	-0.4%

Source: Circana , Integrated Fresh Household Panel, all outlets, 52 weeks ending 4/21/2024



Mushroom Annual Spend per Buyer (at Retail)

Shoppers spend about \$26 per year on fresh mushrooms.

- Crimini/brown mushrooms average annual spend now exceeds that of white mushrooms, at \$17.56. However, it is important to keep in mind that white mushrooms still have a higher household penetration.
- Shiitake, though purchased by a very small share, have the highest annual spend, at \$18.84.
- White mushrooms are the third-highest and have the highest household penetration and trip frequency.

Product	Dollars per Buyer	Dollars per Buyer Change vs YA	Dollars per Buyer % Change vs YA	Dollars per Buyer Change vs 2 YA	Dollars per Buyer % Change vs 2 YA	Dollars per Buyer Change vs 3 YA	Dollars per Buyer % Change vs 3 YA
Dept-produce	\$753.19	+\$17.14	+2.3%	+\$48.67	+6.9%	+\$81.12	+12.1%
Fresh cooking vegetables	\$67.30	+\$0.55	+0.8%	+\$6.05	+9.9%	+\$5.65	+9.2%
Fresh mushrooms	\$25.76	-\$0.17	-0.7%	+\$0.62	+2.5%	+\$0.12	+0.5%
All other fresh mushrooms	\$12.41	+\$2.64	+27.0%	+\$3.13	+33.8%	+\$3.66	+41.8%
Crimini/brown fresh mushrooms	\$17.56	+\$0.14	+0.8%	+\$1.16	+7.1%	+\$1.62	+10.2%
Oyster fresh mushrooms	\$8.54	+\$1.29	+17.8%	+\$0.32	+3.9%	+\$0.35	+4.2%
Portabella fresh mushrooms	\$10.18	-\$0.07	-0.7%	-\$0.25	-2.4%	+\$0.61	+6.4%
Random weight fresh mushrooms	\$6.23	+\$0.17	+2.8%	+\$0.23	+3.8%	+\$0.33	+5.5%
Shiitake fresh mushrooms	\$18.84	+\$1.18	+6.7%	+\$3.40	+22.1%	+\$2.24	+13.5%
White fresh mushrooms	\$16.45	-\$0.23	-1.4%	+\$0.33	+2.1%	-\$0.28	-1.7%

Source: Circana , Integrated Fresh Household Panel, all outlets, 52 weeks ending 4/21/2024