Consumer Trends Driving Produce Consumption

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Percent of U.S. households that buy produce? 100%

Per capita TOTAL VEGETABLE consumption as % of USDA guideline?

Per capita TOTAL FRUIT consumption as % of USDA guideline?

Annual per capita FRESH FRUIT “eatings”?

Annual per capita FRESH VEGETABLE “eatings”?

Percent of New Yorkers who are obese?
Consumer Trends

• Produce consumption
  • Obesity & overall health
• Aging population
  • Smaller households
• Ethnic diversity
• Sustainability and food sources
• Complex lives and time pressure
Average U.S. consumption compared to recommendations, 2013

Note: Rice data were discontinued and thus are not included in the grains group.

1Based on a 2,000-calorie diet.


“US obesity rates rising for first time since 2004”

Source: bbc.com/news/world-us-canada

2014-15 Average: 38%
Total Fruits

Estimated percentage of persons below, at, or above recommendation

Source: 2015 Dietary Guidelines Advisory Committee (DGAC), Subcommittee 1: Food and Nutrient Intakes and Health: Current Status and Trends
Total Vegetables
Estimated percentage of persons below, at, or above recommendation

- M 1 to 3
- M 4 to 8
- M 9 to 13
- M 14-18
- M 19-30
- M 31-50
- M 51-70
- M 71+
- F 1 to 3
- F 4 to 8
- F 9 to 13
- F 14-18
- F 19-30
- F 31-50
- F 51-70
- F 71+
- All 1+

% below recommendation vs. % at or above recommendation

Intake below recommendation
Intake meeting recommendation
Intake above recommendation

Source: 2015 Dietary Guidelines Advisory Committee (DGAC), Subcommittee 1: Food and Nutrient Intakes and Health: Current Status and Trends
2+ people, no kids
- Single person
- HH w/kids

Percent of Households
- 32%
- 41%
- 27%

68% = No Kids

Source: Data from presentation at FMI Midwinter Conference, January 2013, based on the research report titled “Reframing Retail through the Lens of Changing Food Culture,” Daymon Worldwide and Hartman Group, 2012.

Consumption   Obesity   Aging   Smaller Households   Diversity   Sustainability   Complex Lives
Non-white Households will be Majority by 2050

Distribution of the U.S. Population

- **Hispanic**
- **Black**
- **Asian**
- **White Non-Hispanic**

<table>
<thead>
<tr>
<th>Year</th>
<th>Hispanic</th>
<th>Black</th>
<th>Asian</th>
<th>White Non-Hispanic</th>
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<tbody>
<tr>
<td>2000</td>
<td>4%</td>
<td>13%</td>
<td>13%</td>
<td>70%</td>
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<tr>
<td>2010</td>
<td>5%</td>
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</tr>
<tr>
<td>2020</td>
<td>6%</td>
<td>19%</td>
<td>19%</td>
<td>60%</td>
</tr>
<tr>
<td>2030</td>
<td>7%</td>
<td>23%</td>
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<tr>
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<td>8%</td>
<td>27%</td>
<td>27%</td>
<td>51%</td>
</tr>
<tr>
<td>2050</td>
<td>9%</td>
<td>30%</td>
<td>30%</td>
<td>46%</td>
</tr>
</tbody>
</table>

Source: Nielsen presentation, 2012
Source: US Census
Distinct ethnic cuisines co-mingle in cross-cultural cuisine

Experimentation drives food diversity

Peruvian & Japanese

Mexican & Korean

Texas Style BBQ and Thai

Korean BBQ, Vietnamese, & Mexican

Soul & Mexican
Consumption  Obesity  Aging  Smaller Households  Diversity  Sustainability  Complex Lives

FARM FRESH

Organic Cotton

Dirty Dozen

Clean Fifteen

Source: Environmental Working Group, 2015
Competition for Sourcing Local Produce

Increase in local & regional marketing channels

Since 2007, growth in--

- Farmers’ markets (2014)
- Regional food hubs (2014)
- School Districts with farm to school programs (2011-12 school year)

Sources: USDA, Agricultural Marketing Service, Food Nutrition Service; National Farm to School Network.
Imperfect Revolution Rising…

https://vimeo.com/98441820
https://www.youtube.com/watch?v=lqY6qTCetsg
Takeaways…

• Increasing pressure to address obesity & overall health
• Aging consumers, singles, and smaller will shape produce demand
• Accelerating ethnic diversity of consumers and food preferences
• Potential “permanent” value shopping mentality due to ongoing economic stresses
• Growing awareness, concern, and confusion about sustainability and food safety
• Less time for shopping, decision-making, and food preparation due to complex lives and time pressure