STRAWBERRY SHOPPER PLAYBOOK

Leveraging Strawberry Category Growth Drivers and Shopper Insights



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Study Development: Fusion





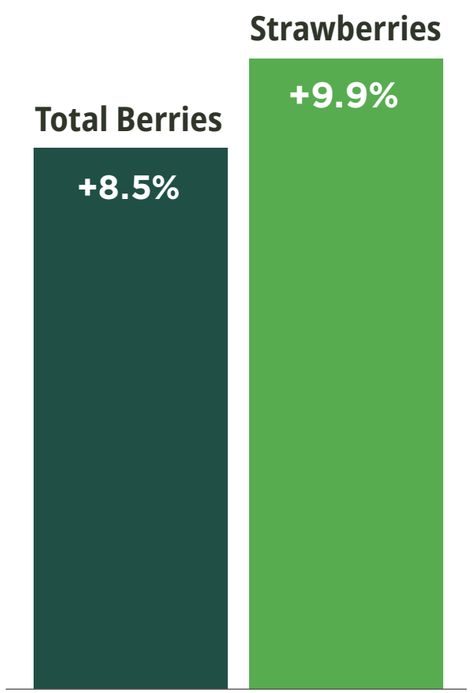
Strawberries Outpaced Total Berry Category Growth, Driven by 32 oz. Packages

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TOTAL STRAWBERRY DOLLAR SALES $5.4 Billion | STRAWBERRY CATEGORY SALES INCREASE VS. 2024 +$491 Million

Strawberry dollar sales growth outpaced the total berry category in the past year.

Dollar Growth Rate vs. Prior Year

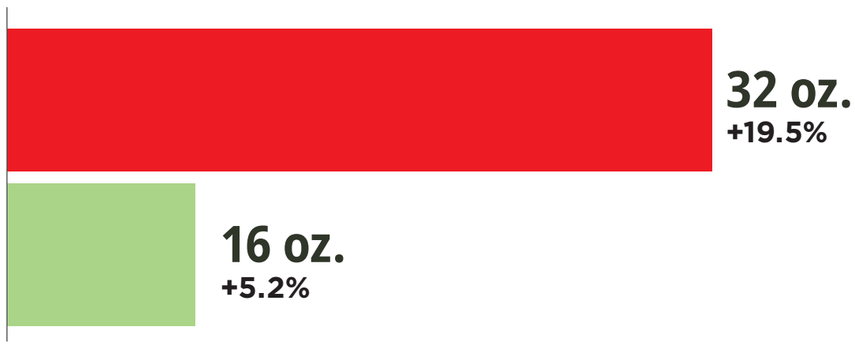


Over the past year, the strawberry category increased by +$491 million, driven by 32 oz. packages.

Incremental Dollar Sales by Package Size Share

Retail dollar growth of 32 oz. packages was achieved without cannibalizing 16 oz. sales.

Dollar Growth Rate vs. Prior Year by Package Size





Maximize retail sales by optimizing product offerings with 32 oz. packages of fresh strawberries.

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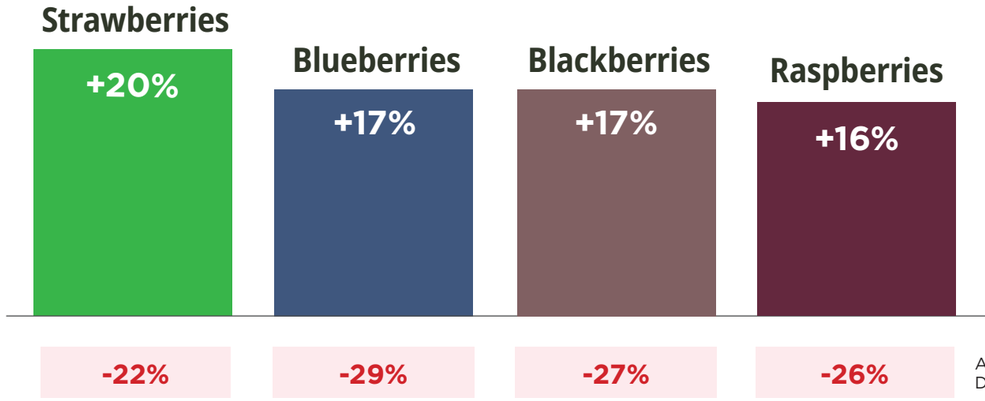
Strawberry Promotions Shine, Yet Purchase Motivators Go Beyond Discounts

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Heavy Buyers: PURCHASE ONCE PER WEEK OR MORE | **Medium Buyers:** PURCHASE SEVERAL TIMES PER MONTH | **Light Buyers:** PURCHASE ONCE PER MONTH OR LESS

Strawberry promotions consistently deliver a stronger promotional lift on a smaller discount, outperforming other berry varieties.

Fresh Berry Promoted Dollar Sales Lift with Average Promoted Discount

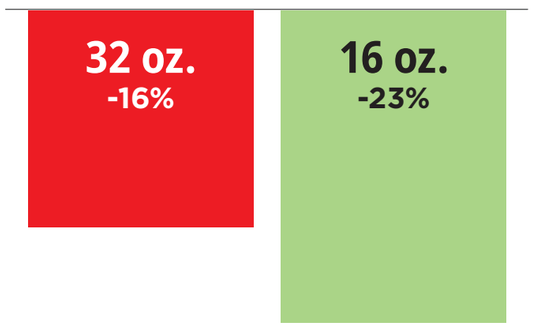


32 oz. packages were promoted with a smaller discount and delivered a comparable dollar sales lift as 16 oz. packages.

Promoted Dollar Sales Lift

32 oz.	16 oz.
+19%	+20%

Average Promoted Discount by Package Size



Heavy buyers are more motivated by displays and less influenced by price discounts compared to light buyers.

Incremental Purchase Drivers

Why did you end up buying more fresh strawberries than you planned?	Heavy Buyers	Medium Buyers	Light Buyers
Strawberries looked fresh	56%	65%	76%
Strawberries were perfectly ripe	44%	63%	41%
Strawberries were on sale	34%	41%	47%
Strawberries were in season	34%	52%	35%
There was a special display	28%	11%	24%



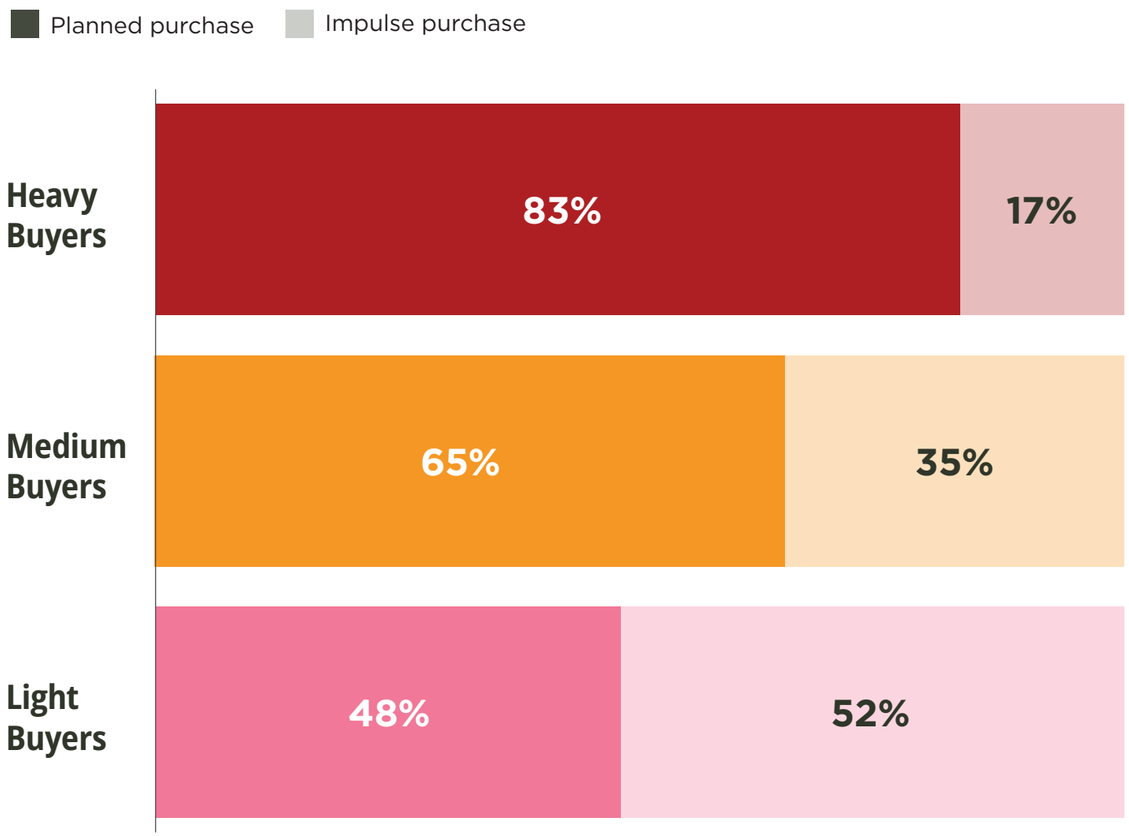
Incorporate impactful displays and merchandising as promotional strategies that go beyond discounts to encourage more incremental purchases.

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Strawberries Are a Planned Purchase for Most Heavy Buyers

83% of heavy buyers planned to purchase fresh strawberries, compared to 48% of light buyers.

Planned vs. Impulse Purchase by Purchase Frequency



Even when shoppers plan to purchase strawberries, freshness is the primary decision factor ahead of other considerations such as price and seasonality.

Planned Purchase Decision Influencers

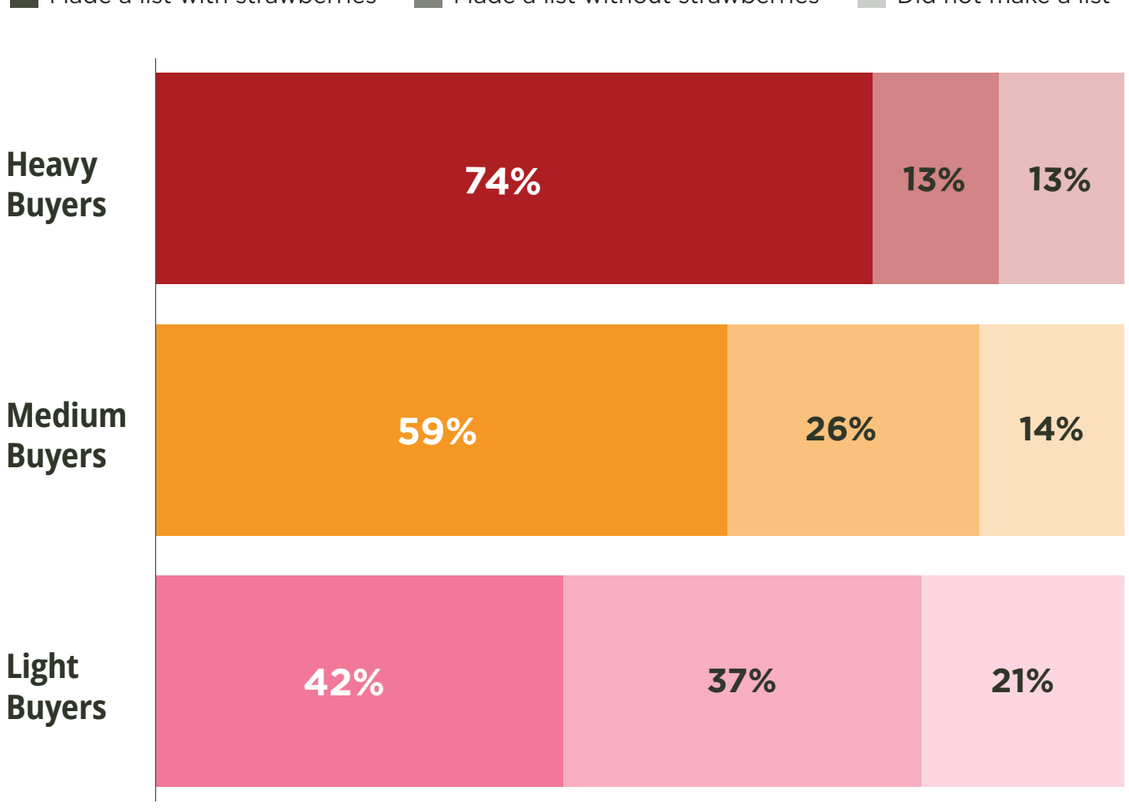
Which, if any, of the following played a role in your decision to purchase fresh strawberries while you were in the store?	Heavy Buyers	Medium Buyers	Light Buyers
The strawberries looked fresh	62%	65%	58%
Strawberries are a regular purchase/staple in my household	42%	35%	18%
The strawberries smelled fresh	40%	38%	31%
Strawberries were in season	38%	40%	43%
The strawberries were the right price	35%	44%	37%

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Strawberries Frequently Make the List for Their Healthy, Naturally Sweet Appeal

74% of heavy buyers added strawberries to their grocery list compared to 42% of light buyers.

Did Shoppers Prepare a List That Included Fresh Strawberries? By Purchase Frequency



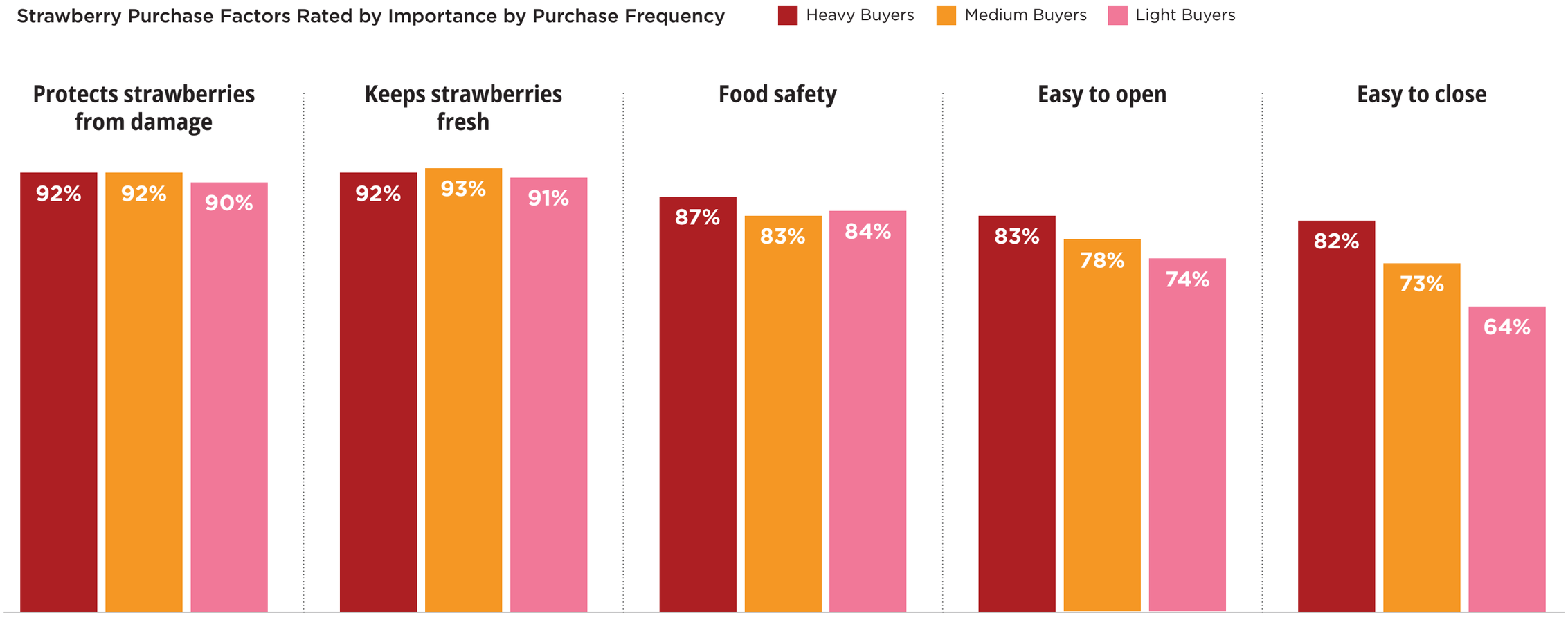
Choosing a healthy, natural snack is the top reason to add strawberries to shopping lists.

Reason for list inclusion	Heavy Buyers	Medium Buyers	Light Buyers
Strawberries are a healthy, naturally sweet snack	61%	57%	39%
Strawberries are a staple on my shopping list	50%	33%	19%
Strawberries are in season	39%	47%	28%
Strawberries are a convenient snack for my household	37%	30%	23%
My kid(s) asked for them	25%	18%	4%
My spouse or another adult asked for them	20%	9%	9%

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Shoppers Prefer Packaging That Preserves Quality, Freshness, and Offers Convenience

Strawberry Purchase Factors Rated by Importance by Purchase Frequency



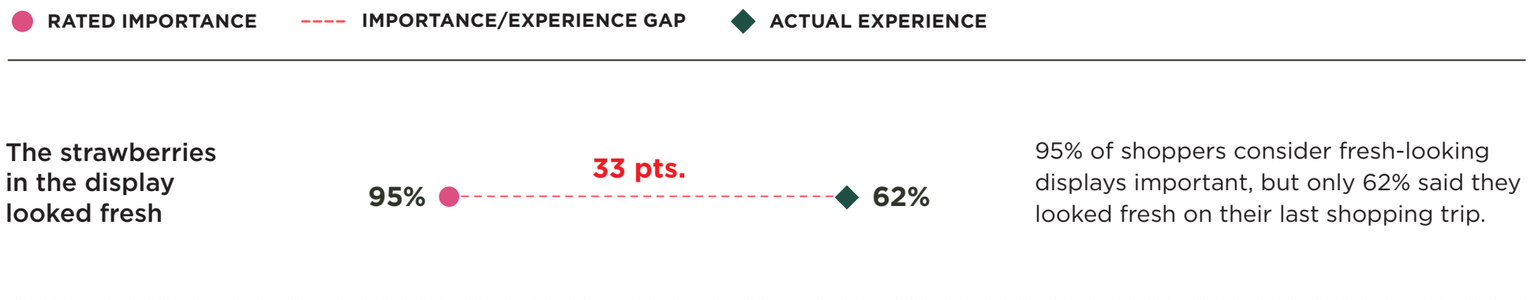


Keep strawberries fresh and ready to eat with simple packaging that protects them from damage and contaminants.

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Heavy Buyers Experienced a Gap Between Expectations and Actual Experience

Strawberry Display Factors — Rated Importance vs. Actual Experience Among Heavy Buyers



95% of shoppers consider fresh-looking displays important, but only 62% said they looked fresh on their last shopping trip.

With no gap, signage represents a point of consistency for shoppers.

Strawberry Attributes — Gap in Rated Importance vs. Actual Experience Among Heavy Buyers

Attribute	Importance/Experience Gap
Right color	29 pts.
Free of bruises/blemishes	42 pts.
Right ripeness	32 pts.
Right price	20 pts.
In season	36 pts.
Right aroma	29 pts.



Ensure consistency in the shopper journey with reliable quality and clear signage to bridge the gap between evolving shopper expectations and their in-store experience.

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The Fresh Strawberry Path to Purchase

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BEFORE THE STORE
Shopping List

Nearly two-thirds of strawberry shoppers prepared a grocery list that included strawberries.

- The primary reason for the inclusion of strawberries was 'strawberries are a healthy, naturally sweet snack.'
- For heavy buyers, the subsequent reason was 'strawberries are a list staple.'

AT THE STORE
Quality Attributes

A fresh appearance was the most important purchasing factor to strawberry shoppers.

- Attributes such as color, ripeness, and overall quality were valued by all shoppers when purchasing strawberries.
- Heavy buyers paid closer attention to aroma, moisture, and leaf condition than light buyers.

AT THE STORE
Display Factors

Display factors were the next-most important purchasing factors after quality attributes.

- A well-organized display, clear signage, and an easy-to-find location within the store were highly valued by all shoppers.
- Nearly 7 out of 10 heavy buyers said they believe refrigerated strawberries stay fresher longer, with 61% rating refrigeration an important display factor.

AT THE STORE
Product Mix

32 oz. packages are gaining popularity.

- 32 oz. packages drove 88% of incremental strawberry volume (lbs.) sales without eroding sales of 16 oz. packages.
- 32 oz. packages drove a similar promoted dollar lift as 16 oz. at a smaller discount, marking their promotional effectiveness as a high-value, high-performance size.

AT THE STORE
Price + Promotions

Strawberry promotions outperform other berries.

- When strawberries are on promotion, they consistently outperform other berries by delivering a stronger promotional lift on a smaller discount.

AT THE STORE
Purchase

AFTER THE STORE
Satisfaction

Satisfied shoppers act on their positive experiences which increases category engagement and reinforces the purchase cycle.

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