



the all-new & improved

Produce Report:
CANADA



A New & Improved Source for Market Intelligence

Canadian data is hard to come by, just ask anyone who sells fresh fruits and vegetables to any one of the top Canadian grocery retailers and they'll tell you the same thing.

In 2024 we launched *Proxy Market Share*, an alternate source for Canadian retail intelligence. In short, it was a hit with the industry. It provided insights into retail leaders and laggards, plus visibility into the major grocers gaining market share and those losing it. It was the ideal solution for produce suppliers wanting to craft a custom pitch based on their retail customers' category strengths and weaknesses.

The early success of *Proxy Market Share* prompted an enhanced intelligence system that goes far beyond retail market shares. Introducing *The Produce Report: Canada*.

In addition to the market share reporting that made the initial report so popular, the new and improved system adds national and regional volume availability stats complete with estimated retailer requirements reported by month, quarter or annual needs, depending on the timeframe of the report right down to the number of trucks required in each Canadian region for each major retailer. Now produce suppliers can 'size the prize' when creating their tailored sales strategies. This is something you won't find anywhere else.

Something else many produce suppliers will tell you, they have two sets of customers; the retailers they sell to and the consumers who shop in their customers' stores. Expose a lack of understanding, or worse, a disregard for the consumer shopping in their stores and it could be a deal breaker. *The Produce Report: Canada* has you covered there too. In-depth consumer profiles offers a glimpse of the core Canadian consumer for each category.

With market share insights, seasonal volume estimates by retailer, and consumer profile details - all supported by robust analytics - *The Produce Report: Canada* emerges as the go-to resource for Canadian produce intelligence. The best part, the required investment is far lower than other intelligence solutions that offer far less. Keep reading this guide for more information on how the *The Produce Report: Canada* intelligence system can transform your Canadian sales efforts.

The New & Improved Produce Report: Canada Usage Guide

Six tabs, each providing valuable intelligence from a different vantage point

The first tab, titled **'Market Analysis'**, houses the raw household penetration and market share data. On the first page national household penetration is displayed per product for each retailer. We gather this intelligence each month by asking 1,000 Canadian grocery shoppers about their produce purchases, both about what they've purchased and where they shop.

Each retailer's household penetration is indexed to the market, showing leaders and laggards, then multiplied by publicly available national, total store market share to calculate our **Proxy Market Share**. The difference between this value and the identical metric from the same time period last year gives us the change in the proxy market share. Check out the page called **Terminology** further on in this user's guide to get detailed descriptions of all the terms used in **The Produce Report: Canada**.

Subsequent pages break the intelligence down by Canadian region and by retail format. These pages report on household penetration and penetration index only. Reliable, publicly available market share data on these smaller slices of the Canadian market are not available.



In the second tab, titled **'Product Analysis'**, the report becomes inter-active. Using the first drop down box the user can select the desired category for a deeper review of market shares and household penetration indices. The second drop down box brings the intelligence one step deeper by narrowing the scope to only the desired retail company.

The selections on this page determine the focus category and retailer on the next tab titled SWOT analysis.

Select a Product from the dropdown list to the right: **Tomatoes** Make Selection

National	Market Share	HH Pen%	HH Pen% Ind
Loblaw	29.1%	58.6%	103.8%
Sobeys	20.1%	56.6%	100.3%
Metro	11.2%	57.8%	102.2%
Walmart	7.3%	51.7%	91.4%
Costco	9.0%	56.8%	100.5%
Pattison	3.6%	50.9%	90.1%
Other	19.7%		

Regional Analysis

WEST	HH Pen%	HH Pen% Ind
Loblaw	63.6%	105.7%
Sobeys	70.3%	116.8%
Walmart	54.6%	90.6%
Costco	49.6%	82.4%
Pattison	57.3%	95.2%

Ontario	HH Pen%	HH Pen% Ind
Loblaw	56.3%	102.7%
Sobeys	48.8%	89.0%
Metro	53.7%	98.0%
Walmart	48.8%	89.0%
Costco	56.4%	102.8%

Quebec	HH Pen%	HH Pen% Ind
Loblaw	50.8%	96.1%
Sobeys	64.7%	122.3%
Metro	58.8%	111.2%
Walmart	61.7%	116.8%
Costco	72.6%	137.4%

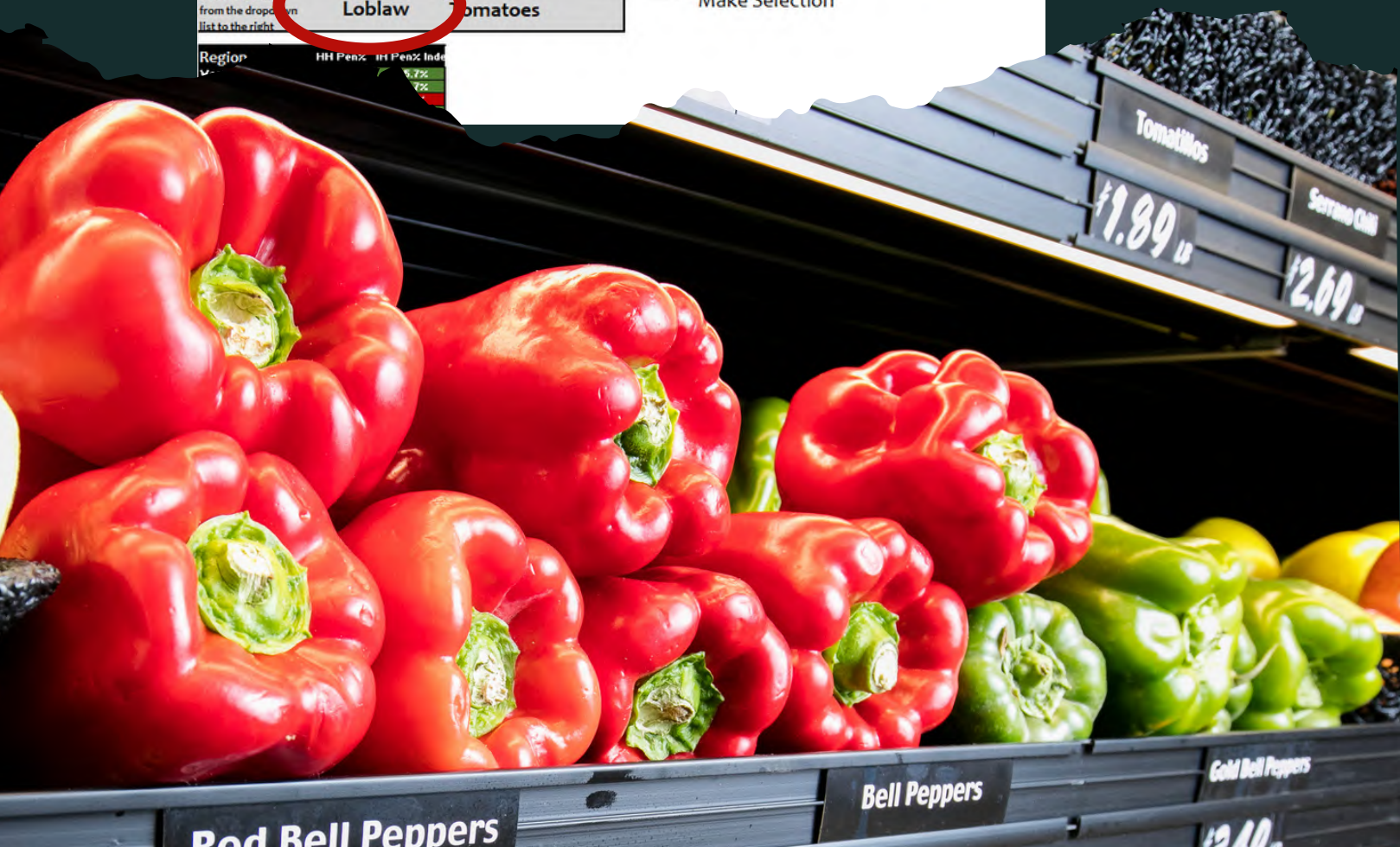
Format Analysis

Conventional	HH Pen%	HH Pen% Ind
Loblaw	59.9%	105.5%
Sobeys	60.2%	105.9%
Metro	60.0%	105.7%
Pattison	51.2%	90.1%

Discount	HH Pen%	HH Pen% Ind
Loblaw	59.8%	97.4%
Sobeys	51.9%	84.5%
Metro	61.2%	99.6%

Mass	HH Pen%	HH Pen% Ind
Loblaw	62.9%	114.7%
Walmart	50.2%	91.4%

Select a Retailer from the dropdown list to the right: **Loblaw** Tomatoes Make Selection



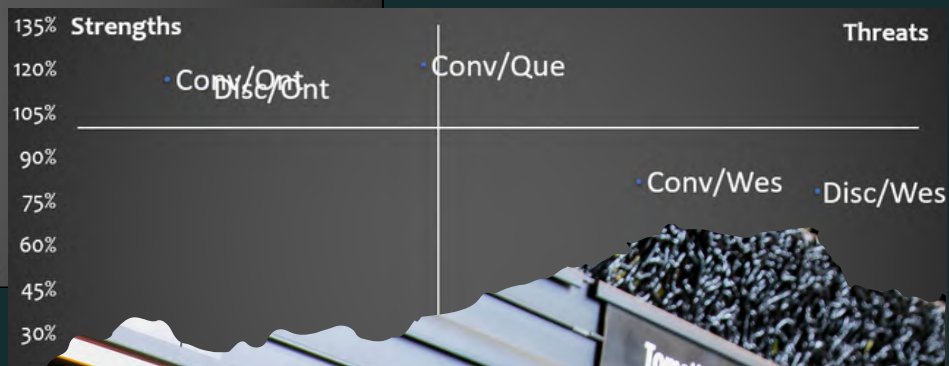
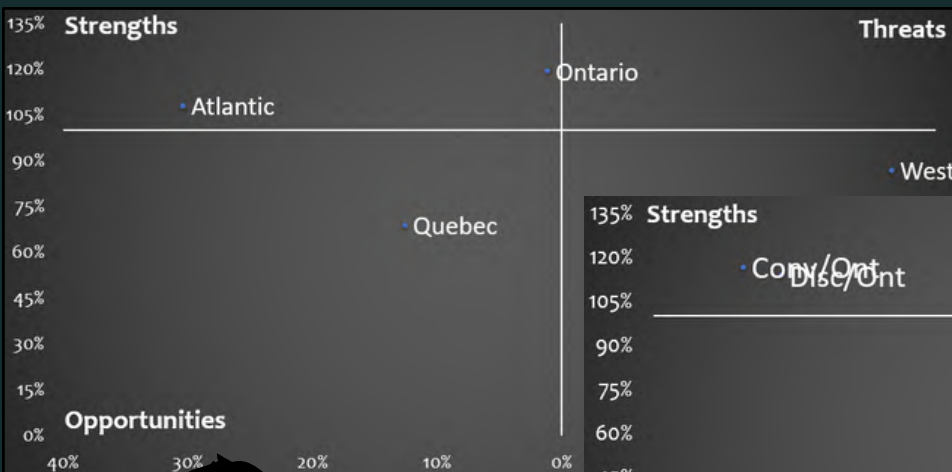
The third tab, titled **'SWOT Analysis'**, is one of the key intelligence features in **The Produce Report: Canada**. It is here that you can visualize the leaders and laggards and winners and losers. This is accomplished using five separate four-quadrant graphs categorizing retailers into one of the quadrants:

- Strengths - those who have an household penetration index above 100 and is growing its penetration relative to the market
- Weaknesses - household penetration below 100 and shrinking
- Opportunity - household penetration below 100 and growing
- Threat - household penetration above 100 and shrinking

Each chart details a different market breakdown:

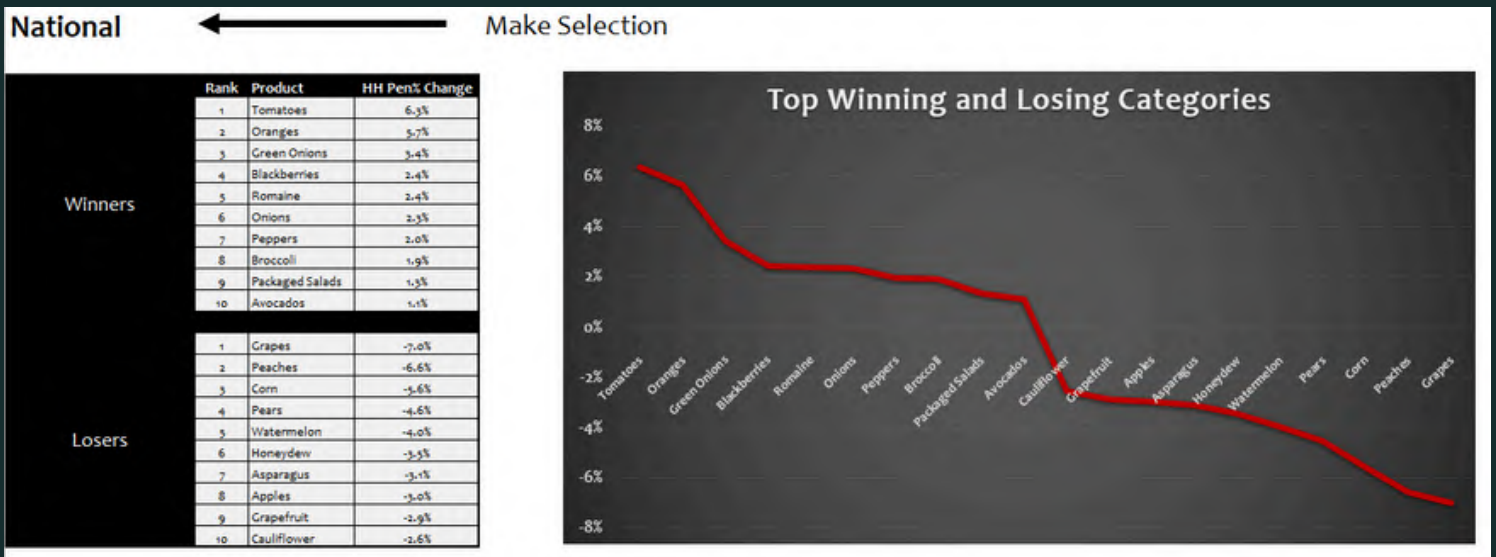
CHART

- 1) Each retailer's regional businesses for the target category selected in the Product Analysis
- 2) Each retailer's individual format businesses for the target category
- 3) Target retailer's (as selected in the Product Analysis) regional businesses for the target category
- 4) Target retailer's individual format businesses for the target category
- 5) Target retailer's format business within each region in which it is operated. This SWOT analysis offers the richest intelligence available on this tab. It is very useful for understanding your target retailer's strengths and weakness in very fine detail.



The fourth tab, titled **'Product Winners & Losers'** is another user driven analysis. The user can review the top 10 fastest growing categories and the top 10 fastest shrinking categories, comparing current results to the year prior's results.

By selected the appropriate group, the user can view these results nationally, regionally or by grocery format. this intelligence is useful in determining trends in the market place and if those trends are regionally specific or specific to different grocery formats.



The fifth tab, titled **'Volume Analysis'** is one of the new features in **The Produce Report: Canada**. One of the most powerful features, this user driven analysis allows the user to **'size the prize'**, offering product volume availability data straight from Statistics Canada. This availability data is then transformed into credible estimates for volume usage by retailer through the use of a sophisticated algorithm utilizing the report's own market share results, store counts, Canadian census data, USDA North American shipment data and estimates on the food service / retail splits by commodity. Volumes are presented as either annual, quarterly or monthly estimates, based on the timeframe of the report and further broken down to truckload requirements by Canadian region for each major retailer. An incredible source of detailed information not found anywhere else.

Again, the user can select their desired category with the dropdown box provided.

Select a Product from the dropdown list to the right

Kiwifruit

2025

2024

National HH Penetration %

17.53%

2024 National HH Penetration %

16.08%

Geography	Population	Percent of National Population (Ex: 100%)	Kiwifruit - HH Pen% Index	Per Capita Consumption 2023: March (Kgs)	Total Estimated Consumption (Kgs)	Estimated Regional Share of Kiwifruit
National	40,400,000	100%	100%	0.04	1,700,000	100%
Atlantic Region	2,600,000	6.4%	85%	0.04	90,000	5%
Quebec Region	8,900,000	22.0%	126%	0.05	500,000	29%
Ontario Region	15,800,000	39.1%	98%	0.04	700,000	41%
West Region	13,000,000	32.2%	96%	0.04	500,000	29%

Geography	Population	Percent of National Population (Ex: 100%)	Kiwifruit - HH Pen% Index	Per Capita Consumption 2022: March (Kgs)	Total Estimated Consumption (Kgs)	Estimated Regional Share of Kiwifruit
National	40,400,000	100%	100%	0.05	2,100,000	100%
Atlantic Region	2,600,000	6.4%	97%	0.05	130,000	13%
Quebec Region	8,900,000	22.0%	120%	0.06	500,000	50%
Ontario Region	15,800,000	39.1%	103%	0.05	800,000	80%
West Region	13,000,000	32.2%	89%	0.05	600,000	60%

Per Capita Consumption (Kgs)

Year	Per Capita Consumption (Kgs)
2019	0.04
2020	0.04
2021	0.05
2022	0.05
2023	0.04

Retailer	Proxy National Kiwifruit Market Share	Kiwifruit - HH Pen% Index	Estimated Consumption (Kgs)	Volume Change (Kgs)	% Volume Change
Loblaw	29.2%	100.7%	370,000	-90,000	-19.57%
Sobeys	21.6%	103.0%	280,000	10,000	3.70%
Metro	11.2%	103.8%	140,000	-30,000	-17.65%
Walmart	6.3%	83.4%	80,000	-30,000	-27.27%
Costco	14.6%	132.7%	190,000	-20,000	-9.52%
Pattison	2.3%	57.7%	30,000	-40,000	-57.14%
Other	14.8%	N/A	190,000	-90,000	-32.14%

Retailer	Proxy National Kiwifruit Market Share	Kiwifruit - HH Pen% Index	Total Estimated Consumption (Kgs) Rounded
Loblaw	29.3%	100.9%	460,000
Sobeys	17.4%	82.7%	270,000
Metro	10.9%	100.8%	170,000
Walmart	7.1%	94.9%	110,000
Costco	13.1%	119.3%	210,000
Pattison	4.4%	110.2%	70,000
Other	17.8%	N/A	280,000

Kiwifruit HH Pen% Index by Format	Conventional	Discount	Mass	Club
	89.7%	98.6%	98.1%	130.8%

Projected Future Truckloads

Make only **ONE** Selection

Retailer	April	May	June
<input type="checkbox"/> Loblaw	27	24	29
<input checked="" type="checkbox"/> Sobeys	20	18	22
<input type="checkbox"/> Metro	10	9	11
<input type="checkbox"/> Walmart	6	5	6
<input type="checkbox"/> Costco	13	12	15
<input type="checkbox"/> Pattison	2	2	2
<input type="checkbox"/> Other	13	12	15

Select Check Box for **ONE** retailer to see breakout of regional truckload volume

Sobeys	Region	April	May	June
<input type="checkbox"/>	Atlantic	2.7	2.6	3.0
	Quebec	4.4	4.0	4.8
	Other	6.2	5.7	6.8
<input type="checkbox"/>	Atlantic	3	5.8	6.9




The sixth and final tab, titled **'Consumer Profiles'** is another new feature in **The Produce Report: Canada**. Another powerful feature enabling the user to get better acquainted with their core consumer. As this is important to suppliers and retailers alike, this knowledge has the dual benefit of increasing the user's consumer intelligence and also enhancing their profile with their retail customers.

Using Execulytics consumer data, this user driven analysis reports on the gender, age, annual income and region of residence for the consumers with the highest household penetration of the selected category. It also gives an indication on the grocery store selections made by this core customer.

dropdown
up/down
arrow

Carrots

Typical Carrots Consumer

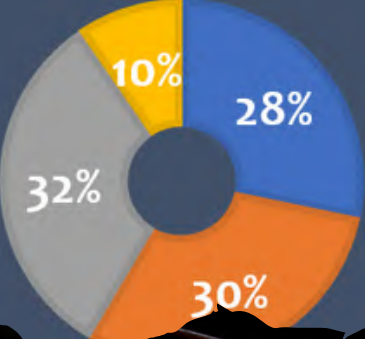


Carrots Consumer Profile

Gender	female
Age	65 plus years old
Annual Household Income	\$100K-\$160K per year

Common Grocery Formats

■ Conventional
 ■ Discount
 ■ Mass
 ■ Club



Conventional	28%
Discount	30%
Mass	32%
Club	10%

Regional HH Pen% Index

WEST	101%
ONTARIO	98%
QUEBEC	100%
ATLANTIC	108%



Terminology

The Produce Report: Canada uses various terminology, including:

Household Penetration & HH Pen%:

Refers to the percentage of households that have purchased the product in question during each measurement period.

HH Pen% Index:

This is the household penetration index and compares one household penetration value to the entire market. It is measured by dividing the target household penetration value into the total market household penetration value and displayed as a percentage. An index value over 100% is considered over-indexed (i.e. performing better than the market), while a value under 100% is under-indexed (i.e. performing worse than the market). A value of exactly 100% signifies that performance is equal to the market.

Index Change:

This measure is displayed on the regional and format breakouts. It is the change in the household penetration index from the same period last year.

Market Share Proxy:

The estimated market share. This is only displayed in the national analysis. It is calculated by multiplying the household penetration index by publicly available, total store market share data.

Market Share Proxy Chg:

This is also only displayed in the national analysis. It is the change in the market share proxy from the same period last year.

SWOT:

An analysis that categorizes business performance in a category as either a strength, weakness, opportunity or threat.

Categories in the SWOT analysis:

Strength: A household penetration index over 100% and an index change greater than 0%

Weakness: A household penetration index under 100% and an index change less than 0%

Opportunity: A household penetration index under 100% and an index change greater than 0%

Threat: A household penetration index over 100% and an index change less than 0%



FAQ's

1) Is this the same as market share reports from other companies?

Market share reporting relies on front-end data obtained from '*participating*' retailers, focusing solely on those specific retailers. In contrast, our data is collected from the Execulytics consumer panel, offering insights into purchased produce varieties and visited stores without any restrictions on retailers.

2) Is The Produce Report: Canada better than typical market share reporting?

While traditional market share reporting provides precise data, it lacks comprehensiveness. The Produce Report: Canada, on the other hand, estimates retailer market shares by factoring indexed household penetrations with published full-store market share figures. These estimates cover the complete set of retailers, not just '*participating*' ones. This method is valuable for identifying market leaders, laggards, expanding businesses, and declining ones. Conventional market share reports are useful for understanding overall market size and how the business is distributed among '*participating*' retailers. In contrast, The Produce Report: Canada, although reliant on estimates, offers a more inclusive view of the market by including all significant players.

3) How does the NEW & IMPROVED Produce Report: Canada estimate retail volumes?

It uses an in-depth algorithm calling on a variety of data sources including: The Produce Report: Canada's own estimates on Canadian market shares, Canadian per capita commodity availability, obtained from StatsCan, North American seasonal shipment volume available through USDA sources to gauge seasonality and researched estimates on the split between retail and food service by commodity.

4) Is it accurate?

It provides a reliable projection of overall requirements, adjusted for seasonal variations. However, it does not consider or anticipate annual shifts in merchandising strategies, such as new advertising initiatives that can significantly influence short-term sales volumes. This tool serves as a valuable resource for assessing potential opportunities and shaping a tailored sales pitch for specific retailers, offering unique insights unavailable with other reporting services.

5) Why use The Produce Report: Canada rather than other reporting tools?

The NEW & IMPROVED Produce Report: Canada is not only cost-effective but it also offers comprehensive intelligence on the Canadian produce market. It serves as a valuable resource for creating sales pitches to Canadian retailers at a fraction of the cost of traditional, less informative reporting tools. This tool reveals insights into strong retailers in your product category, identifies growth opportunities, and helps you understand volume potentials. Moreover, it aids in understanding your category's core consumer and includes retailers not covered by traditional reporting tools. The benefits of The Produce Report: Canada far outweigh its price, making it a worthwhile investment.

6) What's next for Produce Report: Canada?

Throughout the year detailed category deep dives will provide insights into organic penetrations, splits between packaged and bulk and varietal details of all major categories. Users will be able to further understand retail strengths and weaknesses plus consumer profiles for each measured element within the category. The best part; all Quarterly and Monthly subscribers will receive these category deep dives free of charge throughout 2025.



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CANADA

Pricing.

	CDN\$	U.S. \$
Annual Report	\$1,500 + H.S.T.	\$1,250
Quarterly Subscription	\$6,000 + H.S.T. Add quarterly advisory services \$1,000	\$5,000 Add quarterly advisory services \$850
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