



Produce Trendspotting

of **PRODUCE** . . . for **PRODUCE** . . . by **PRODUCE**

To sell... or not to sell)... that is the question (and answer)

Did you know that eggplant begins its peak season in November? I'm sure if you grow eggplant or buy it for a wholesale or retail operation you probably do know that. The rest probably don't spend a lot of time thinking about it. Well, **Produce Moneyball** is about to change all that. After all, for every banana, strawberry or apple there are ten categories just like eggplant. Ignore these categories and you just don't have the full picture. **The Produce Trendsetter** pitches in with their monthly review of the consumer and once again **What's in Store**, along with its shining star the **Volume Whisperer**, illuminates the comings and goings of eggplant right on the shop floor.

Fourth quarter. The stretch run. The sprint to the holidays. Whatever you call it, there is no denying the importance of this last section of the calendar. It is not lost on us that the final quarter is also stacked with over and above events that offer opportunities for big business but also potential distractions that can complicate operations for the final drive to the fiscal year end, assuming your financial calendar matches with the annual calendar. I have found, during my years in the business, that people either approach the fourth quarter with optimism hoping for a year end sales boon to bring in the numbers, or they enter it with trepidation hoping that the post summer slowdown doesn't chip away at the success carved out over the last three quarters. In the end, for most people, their year end business goals boil down to sales. And that's the topic of this month's poll question. Do sales accelerate or slow down in your business during the fourth quarter amidst all the holiday celebrations.

So go ahead and answer this week's poll question. Remember, the results are anonymous and an interesting slice into the psyche of the industry. Don't forget to check back next month for the results, and don't forget to read to the end for last month's poll findings.

Execulytics Monthly Poll

Click on the image below to answer this month's poll question. Remember, all answers are anonymous.

Results will be published in next month's Produce Trendspotting.

During the calendar's fourth quarter (encompassing Thanksgiving, Christmas and New Year's Eve) does your business experience a sales boost or a sales decline?

SELECT ONE

☐ Boost

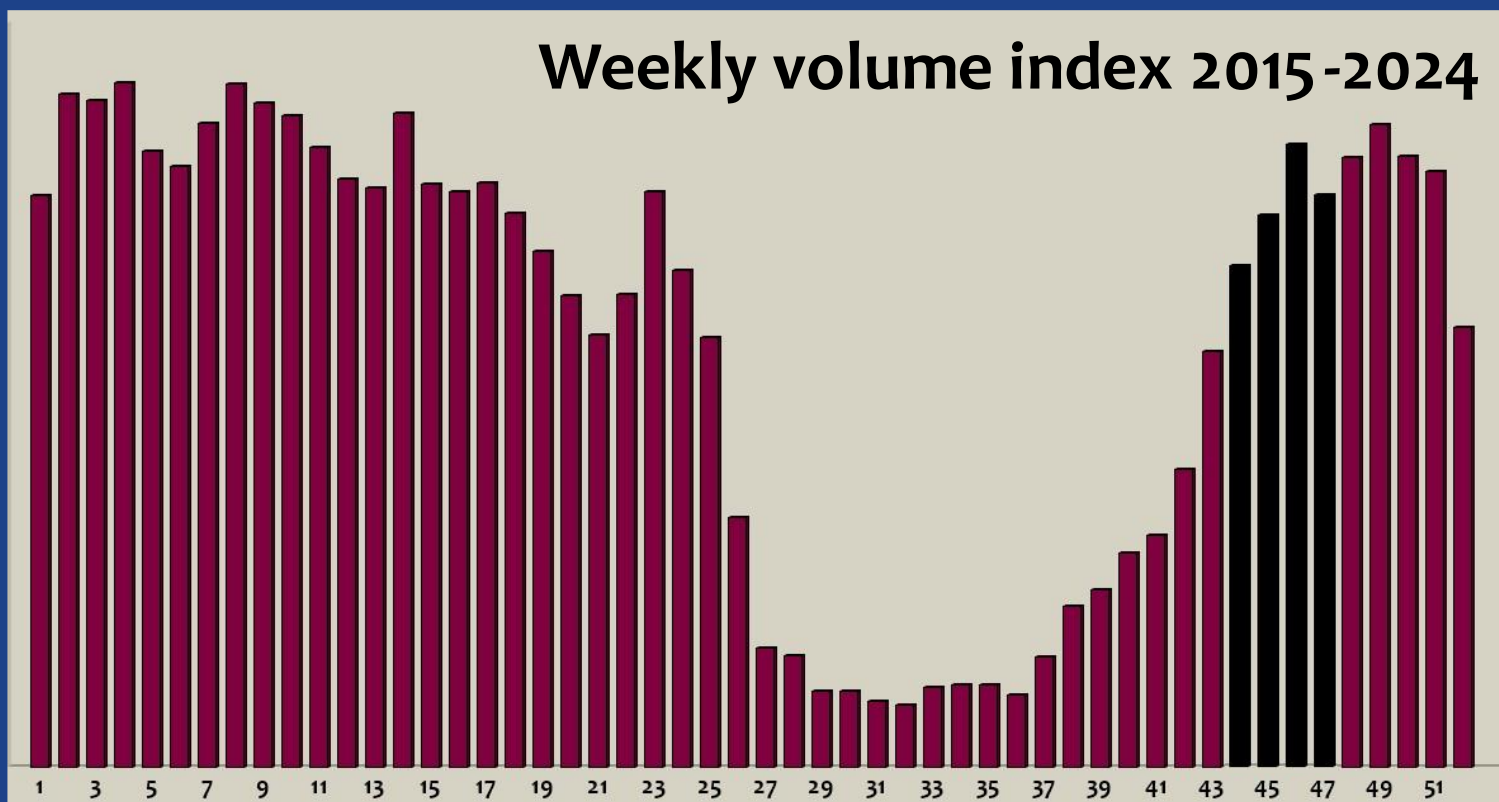
☐ Decline

☐ Neither, it stays the same

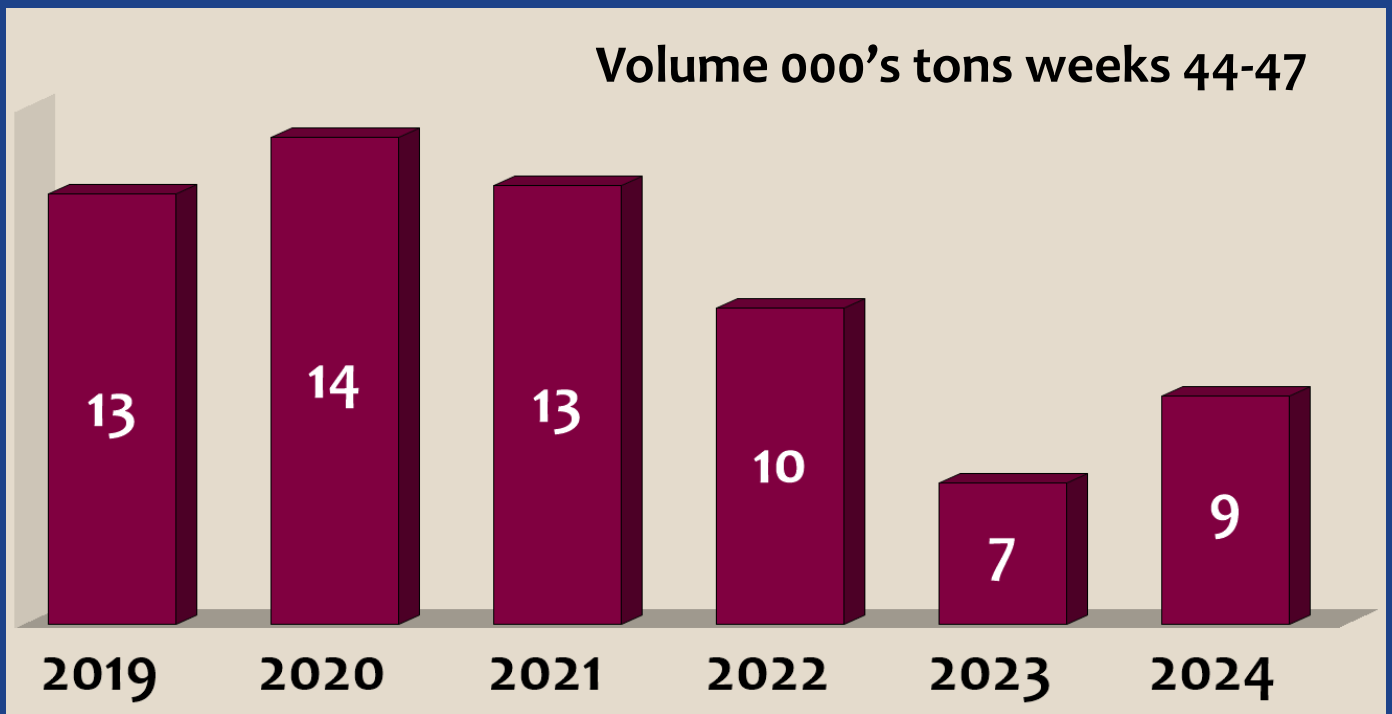


Produce Moneyball

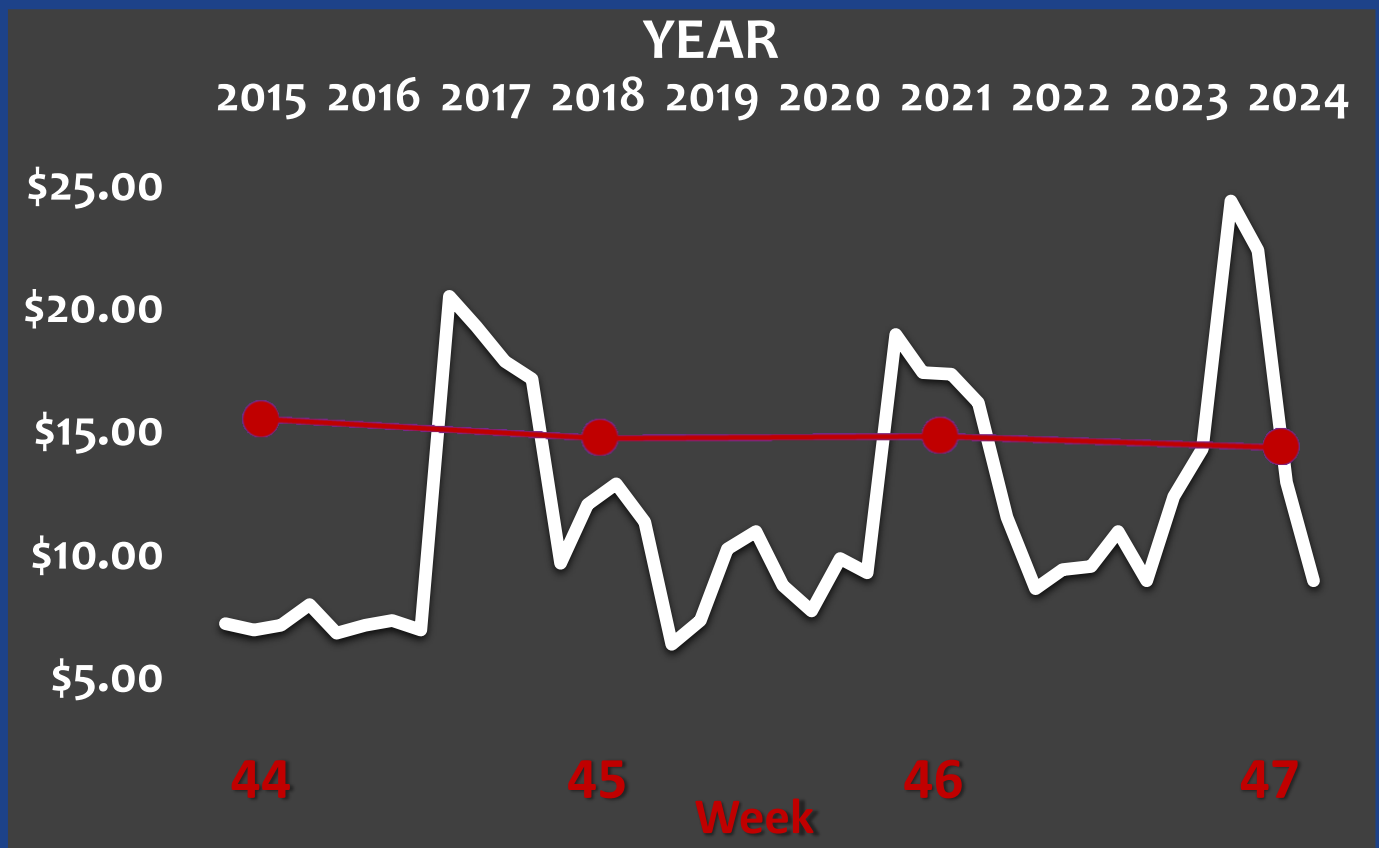
As mentioned right off the top of the newsletter, there is more to the produce business than just bananas, strawberries or apples. For every banana, there's about ten eggplants. And the business cannot run on bananas alone. So, if you are wondering why we are firing up the **Produce Moneyball** engine for a 'C' item, it's because the whole is greater than the sum of its parts. Also, without eggplant how would we be able to make baba ghanouj or eggplant parmigiana. That alone makes eggplant an important enough item. And what better time than the present, just as eggplant prime time is beginning. We see from the chart below that November begins a strong period for the purple wonder.



It makes sense that eggplant begins its time in the spotlight as the weather starts to turn cold. Considering the types of recipes that use it, including the two delicacies mentioned above, plus ratatouille to round out the list. But what has happened recently during this important time of the year for eggplant? The chart on the next page paints an interesting story. It actually reads a bit like a fairy tale. You know the one, where the princess is living a joyful life only to be imprisoned by an evil king eventually being freed by the handsome prince to live happily ever after. Well, that's a lot like eggplant. November of 2020 acts like the joyful beginning, while 2021 is the beginning of the prison years and in 2024 Princess Eggplant is saved, beginning life happily ever after. Will that be



the fate of eggplant? Time will tell. A quick review of the FOB cost chart for medium/large one and one-ninth bushel eggplant and the picture gets a bit clearer, with a bit of mud thrown in. Starting in 2019 and extending through the start of the pandemic stricken 2020, costs are relatively low coinciding with increasing volumes. In 2021 costs went up and volumes dropped, costs reversed themselves in 2022 and volumes went... down? Costs crept up in 2023 and volume plummeted. Finally costs went up sharply in 2024 and volumes went up. It's starting to sound like a Seinfeld episode; just do the opposite. One thing **Produce Moneyball** is good at is bringing calm into the world of chaos. This year, expect costs to keep close to \$15 FOB for the month of November.

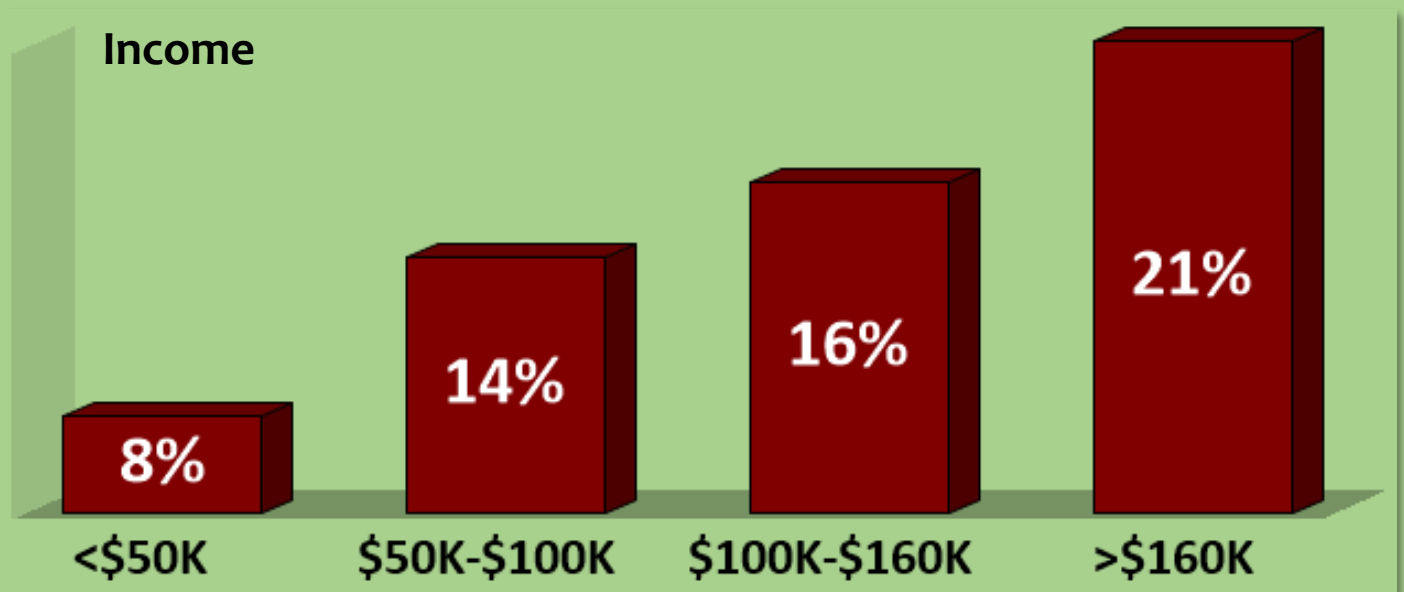
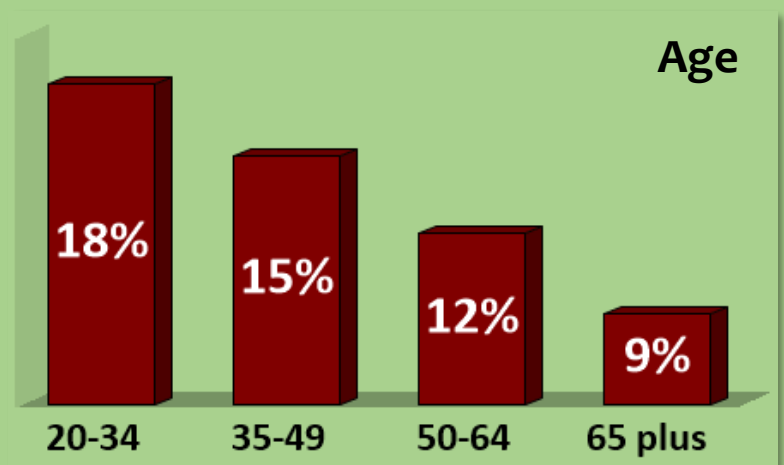
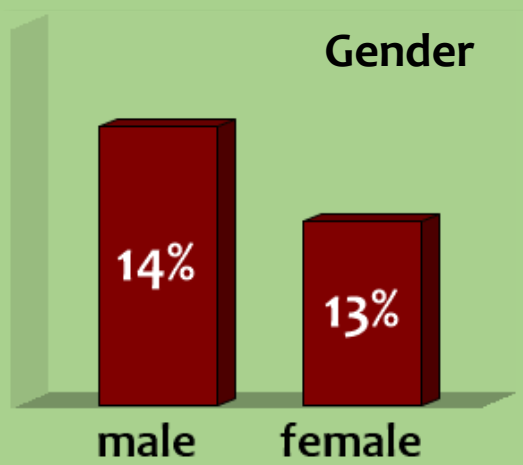


The Produce Trendsetter



Who remembers their first bite of eggplant parmigiana? I sure do. I was in my early twenties, out with colleagues at a local spot called *Rogues*. Someone convinced me to order it as an appetizer. I hesitated, eggplant instead of pasta noodles? My unrefined palate couldn't picture it. But one bite changed my mind. It was rich, savoury, and layered with flavour. Honestly, it might have been the moment my taste buds grew up.

Turns out, I'm not alone. Household penetration numbers suggest about one in seven Canadians had their own eggplant "a-ha" moment. Today, eggplant is winning over younger, higher-income



Consumers, especially men. Nearly one-third of young men in the top income bracket buy it, and about one-quarter of young women too. Parmigiana, baba ghanouj, ratatouille, the dishes vary, but the story is the same: eggplant is trending with an easy to spot demographic.

Where to find these fans? Ontario is a stronghold, but Quebec is home to the real standouts: two out of five high-income young men there purchase eggplant regularly. At lower incomes, the numbers dip, giving Ontario the crown. And where do they shop? Club stores. Spot one there, and peek into their cart, you'll likely see cabbage, garlic, and zucchini. In other words, the makings of a hearty eggplant stew.

Just writing this has me craving one.

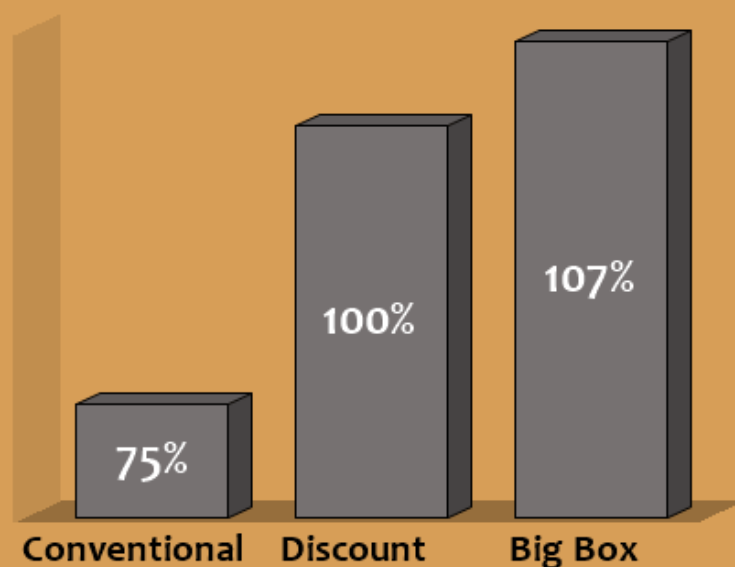
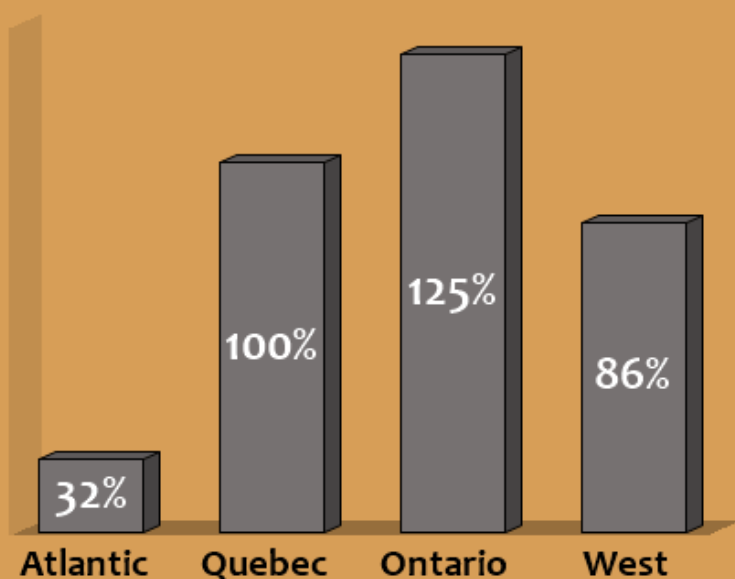


BOTTOM LINE: Between one in seven and one in eight Canadians are bringing eggplant home from the grocery store. The specialty veg appeals to a younger, higher income customer base with a small slant towards men. Eggplant popularity across all demographics peaks in Ontario but spikes in Quebec with the target audience. Club stores are a popular place to pick up eggplant and don't be surprised when you see an eggplant consumer cooking with cabbage, garlic and zucchini.



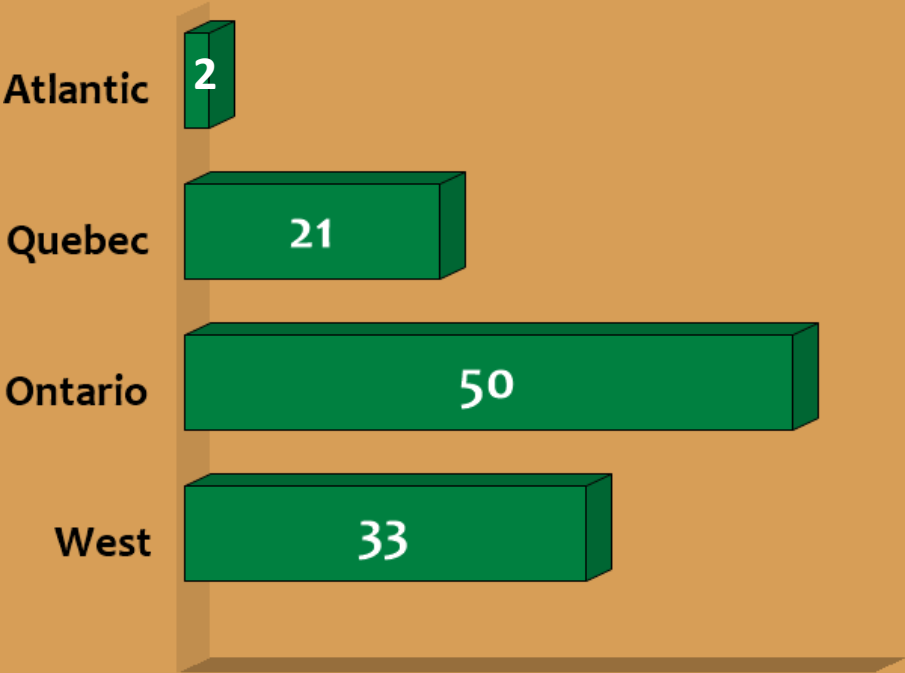
What's In Store?

Who would have thought eggplant could be such a fascinating product? Not only does it anchor a lineup of iconic dishes, but its market story is equally compelling, packed with quirky consumer patterns and surprising demographic twists. **Produce Moneyball** showed us a plotline worthy of a Seinfeld episode: when you expect one thing, the opposite happens. Prices go up? So does demand. Prices go down? Demand eases off. Then **the Produce Trendsetter** pointed out that young, high-income men are most likely to toss eggplant into their cart. But what about on the shop floor, what's really happening in store? That's where our **What's In Store** feature comes in, spotlighting the latest moves in eggplant's retail world.



We already know Ontario leads in penetration, indexing at 125%. Yet Quebec reveals a curious twist: among core consumers, household penetration is even higher than Ontario, but once non-core shoppers are factored in, the index settles back to 100%. Meanwhile, the West lags, and the Atlantic barely registers, though shifting demographics and younger buyers could change that story over time. Format dynamics add another layer: big box stores (mass merchants and clubs) hold the advantage, discount banners hold their own, but conventional stores trail badly. It's another case of higher-income consumers getting the specialty produce they want, even in formats designed to save them money.

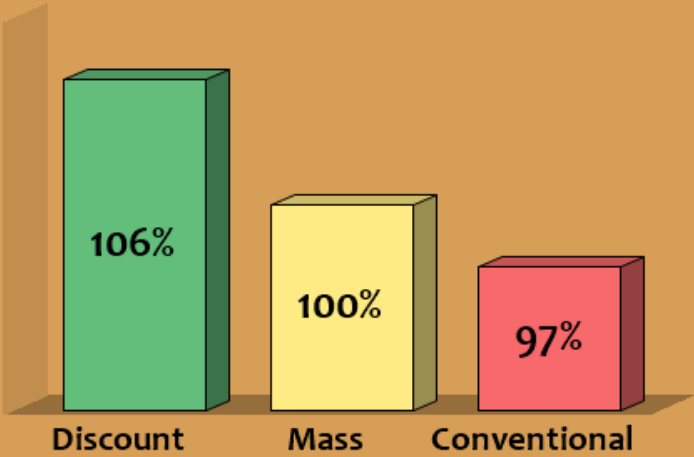
Now for a striking contrast. In Quebec, 8 out of 20 core shoppers buy eggplant regularly. In the West however, the largest demographic is middle-aged, middle-income women and only 1 in 20 shoppers in this demographic pick it up. Eight to one. That’s a massive gap. And with all this talk of household penetration, how much volume are we really dealing with?



Enter the **Volume Whisperer**. This tool brings together multiple data streams to size the eggplant prize with precision. For November, the numbers look like this, according to the **Volume Whisperer**:

- Atlantic: 2 truckloads
- Quebec: 21 truckloads
- Ontario: 50 truckloads
- West: 33 truckloads

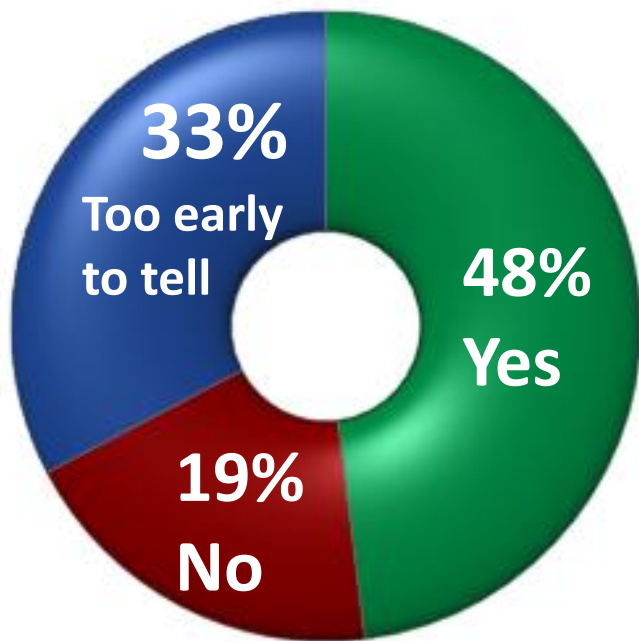
That’s 106 truckloads of eggplant across Canada in a single month. That’s a whole lot of ratatouille.



← **More Expensive Less** →

Pricing adds one more curveball. If you’re selling eggplant, expect the strongest prices out West, softening as you move east. You’d think Western Canadians are big eggplant buyers, but they aren’t, retailers may simply be using pricing to spark demand. And here’s the kicker: if you’re bargain hunting, don’t head to discount stores. The best deals are actually in conventional formats. When it comes to eggplant, sometimes you just have to toss out conventional thinking and go with the flow.

Last Month's Poll Question



With Labour Day in the rear-view mirror, year-end goals start to come into focus. Are you on track to meet most of your goals?

Check back to this spot every month to see the results of last month's Produce Trendspotting survey. Be sure to answer this month's question, if you haven't already, follow this link:

[PRODUCE TRENDSPOTTING POLL](#)

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Sincerely,

Execulytics Managing Partner

Mike Mauti

