

Fresh Produce Retail Analysis: Key Findings & Data-Led Recommendations

An anonymised Fresh Produce case study using barcode-level analysis to identify assortment, supplier, and waste optimisation opportunities



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Context



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Context

Fresh Produce is highly sensitive to seasonality, shelf life, demand variation, supplier dependency, and waste exposure. This case study uses barcode-level retail analysis to assess Fresh Fruits and Vegetables across:

Assortment Movement | Supplier Dependency | Sales Contribution | Waste Risk

The objective was to identify where the category was stable, where it was exposed, and where optimisation actions should be prioritised.

Core Assortment Dominance

~77% of barcode activity came from retained Old barcodes

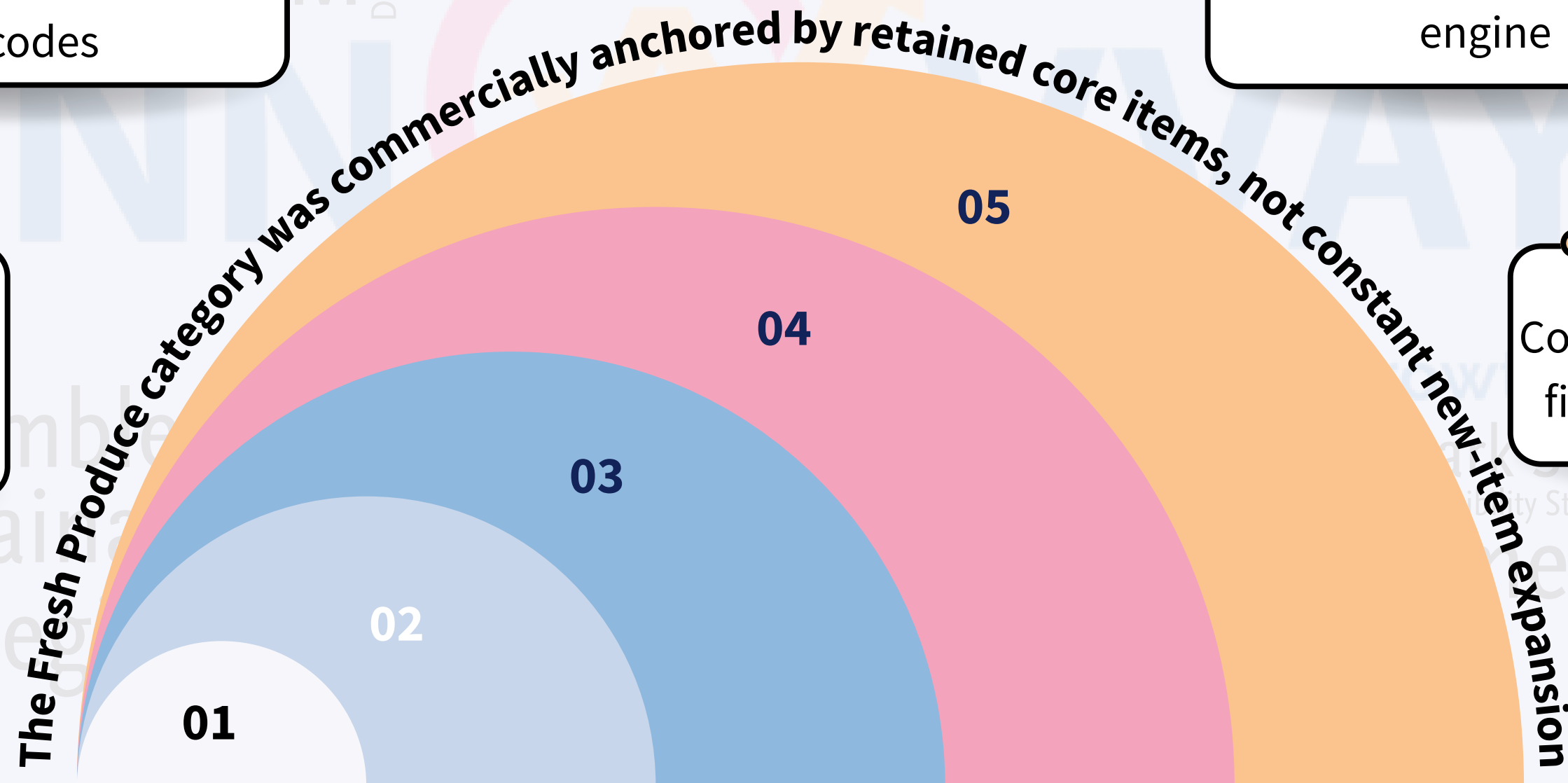
Old barcodes generated the majority of total sales

Old barcodes remained the commercial anchor.

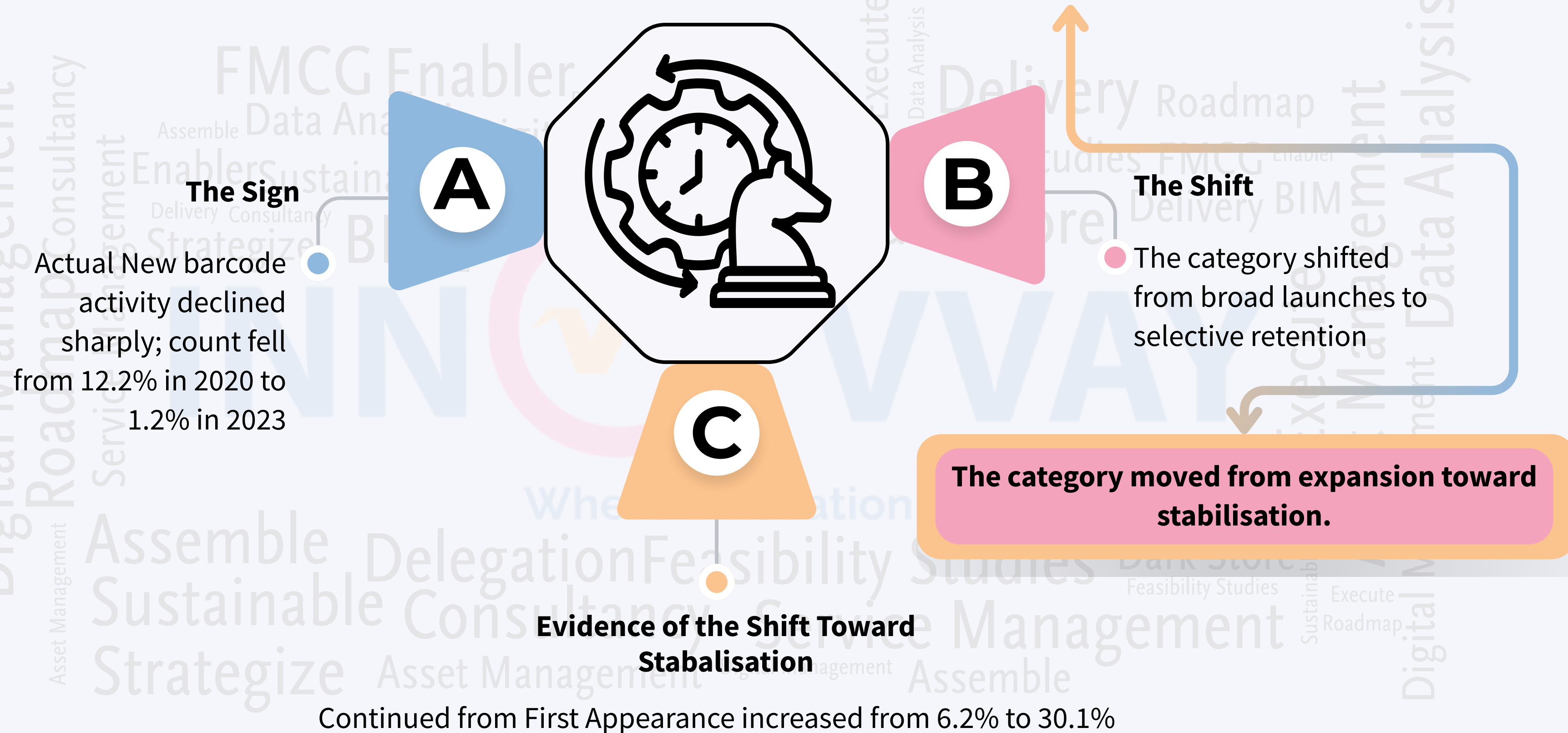
The established range remained the commercial engine

Old barcodes formed the core of the assortment.

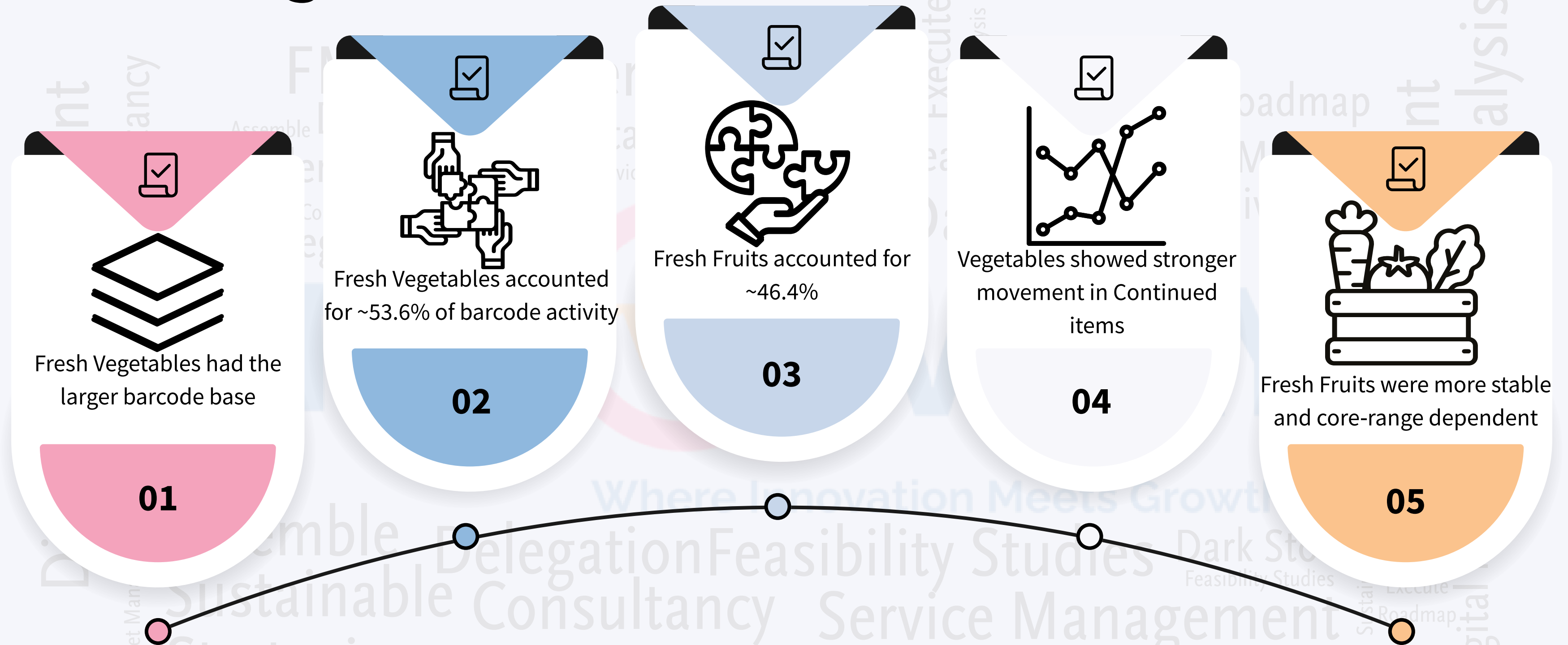
Core range protection is the first optimisation priority



Shift Toward Assortment Stabalisation

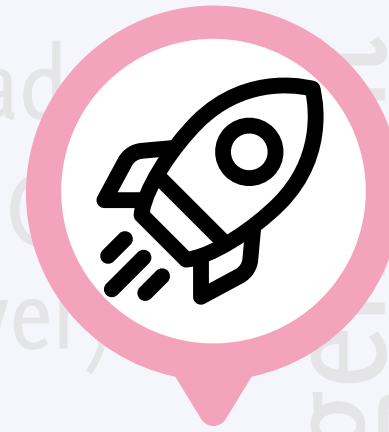
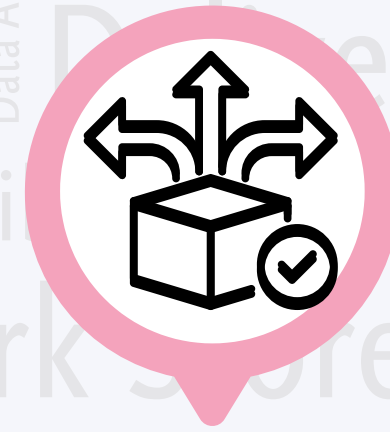
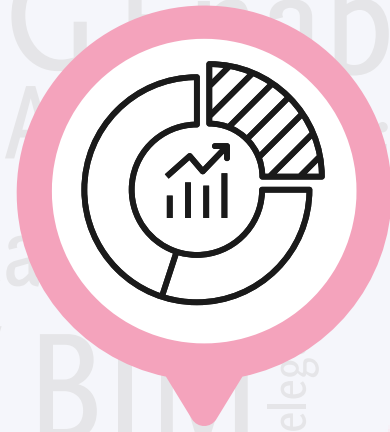


Fresh Vegetables vs Fresh Fruits



Fresh Vegetables showed greater lifecycle movement, while Fresh Fruits remained more dependent on the retained core range.

Supplier Concentration



01

One Anchor Supplier drove the majority of sales

02

Anchor Supplier sales share was **~85.7%**

03

Supplier diversity existed, but sales concentration remained high

04

Secondary suppliers supported assortment breadth

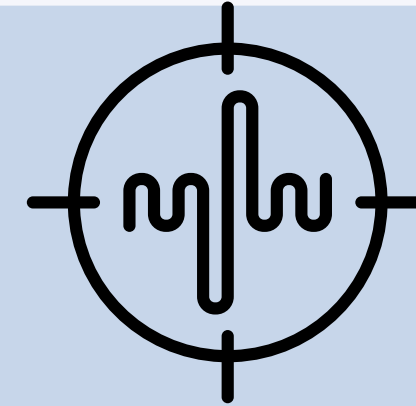
05

Supplier strength was linked to core-range support, not only new launches

Anchor Supplier Dependency Over Time

04

Anchor Supplier generated over 80% of annual sales



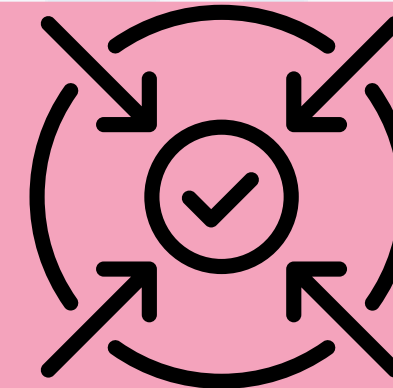
03

Supplier dependency declined slightly from 2019 to 2022- which then increased again in 2023



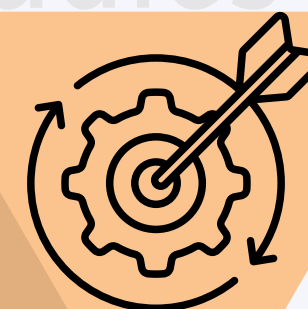
02

The wider supplier base supported variety, not sales at the same scale

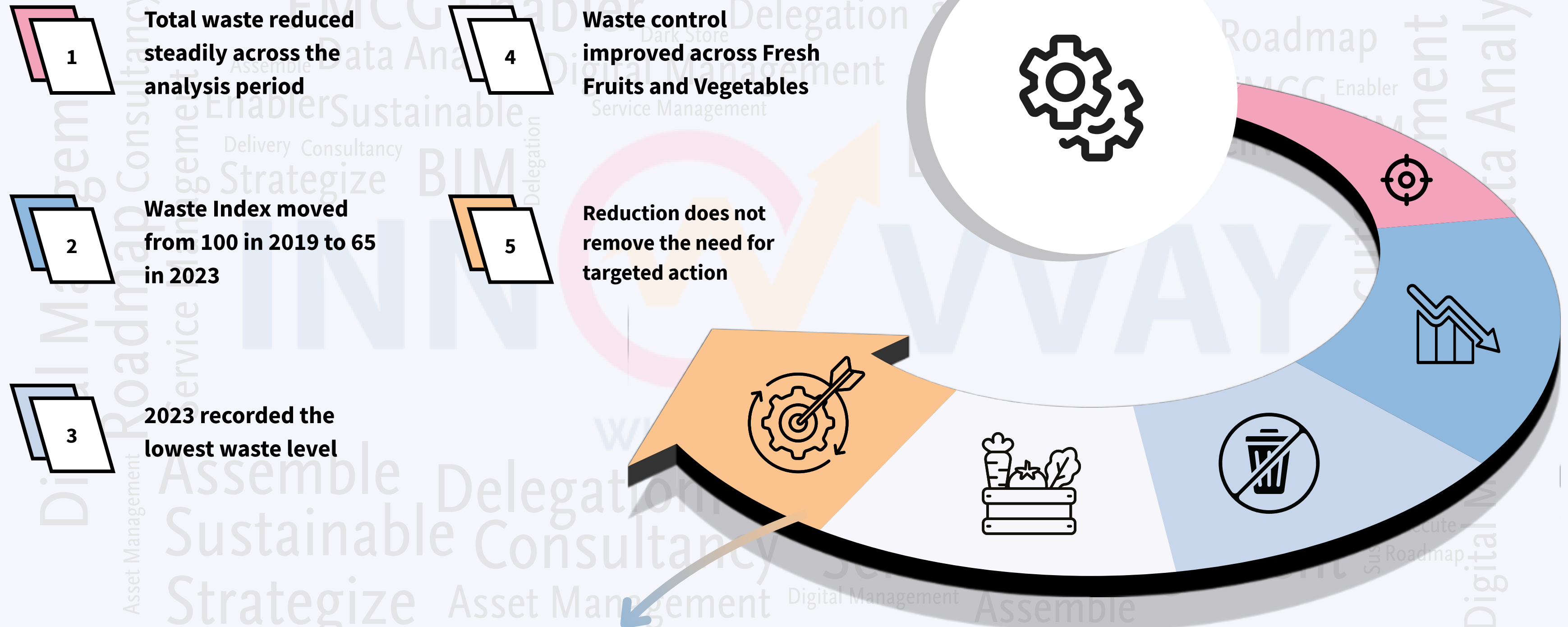


01

Supplier dependency should be reviewed, not immediately replaced

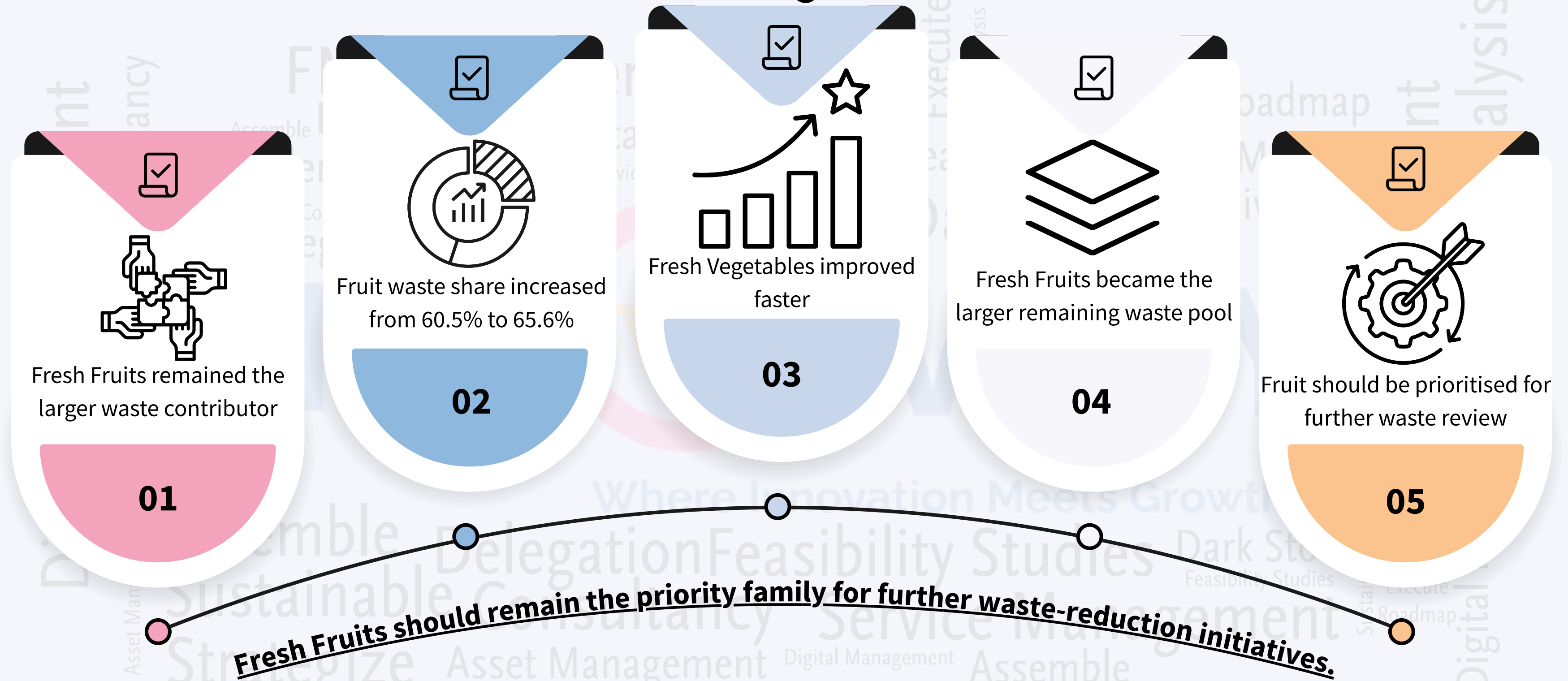


Waste Reduction Trend

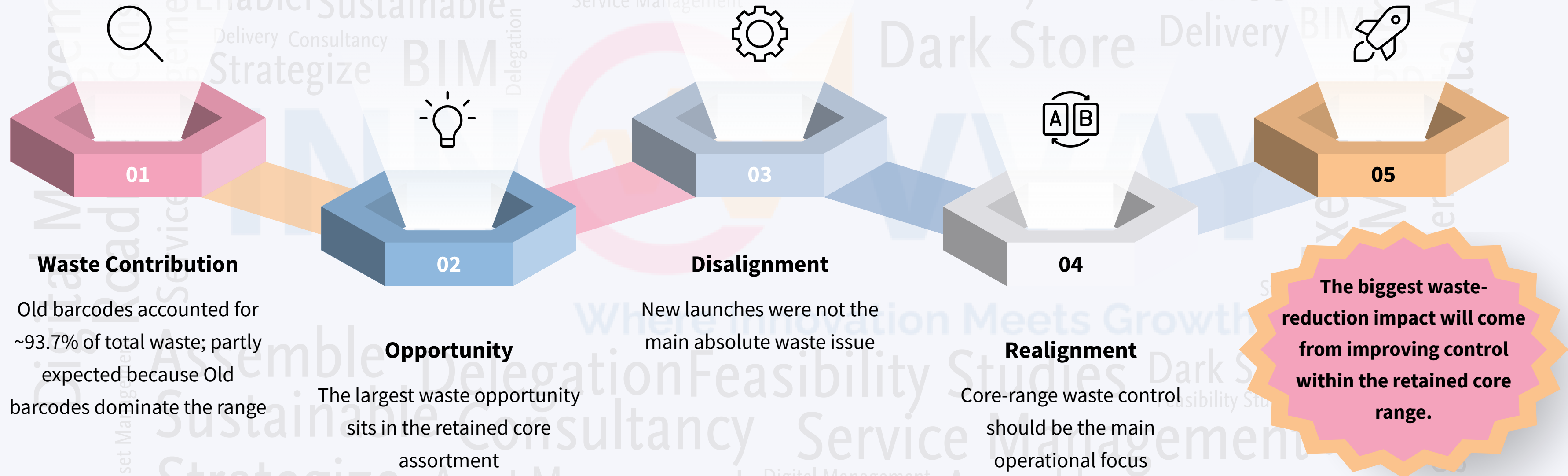


Waste improved overall, but the remaining opportunity became more concentrated.

Fresh Fruits Waste Priority



Waste by Barcode Lifecycle



Retained Newer Items

Continued from First Appearance became significant

Continued from First Appearance items became more important; waste share rose from 1.8% in 2020 to 13.4% in 2023

Reclassifying Retained Items

Retained newer items were no longer short-term launches- became part of the recurring assortment. They require regular sales, waste, supplier, and replenishment review

Once new items are retained, they must be managed like recurring assortment lines.

Waste Risk Matrix



Actual New items are riskier by rate; Old barcodes create the largest total waste exposure.

Barcode Level Sales Fragmentation

6.5% had Low Sales Contribution

Sales were spread across many SKUs, origins, pack sizes, and product types

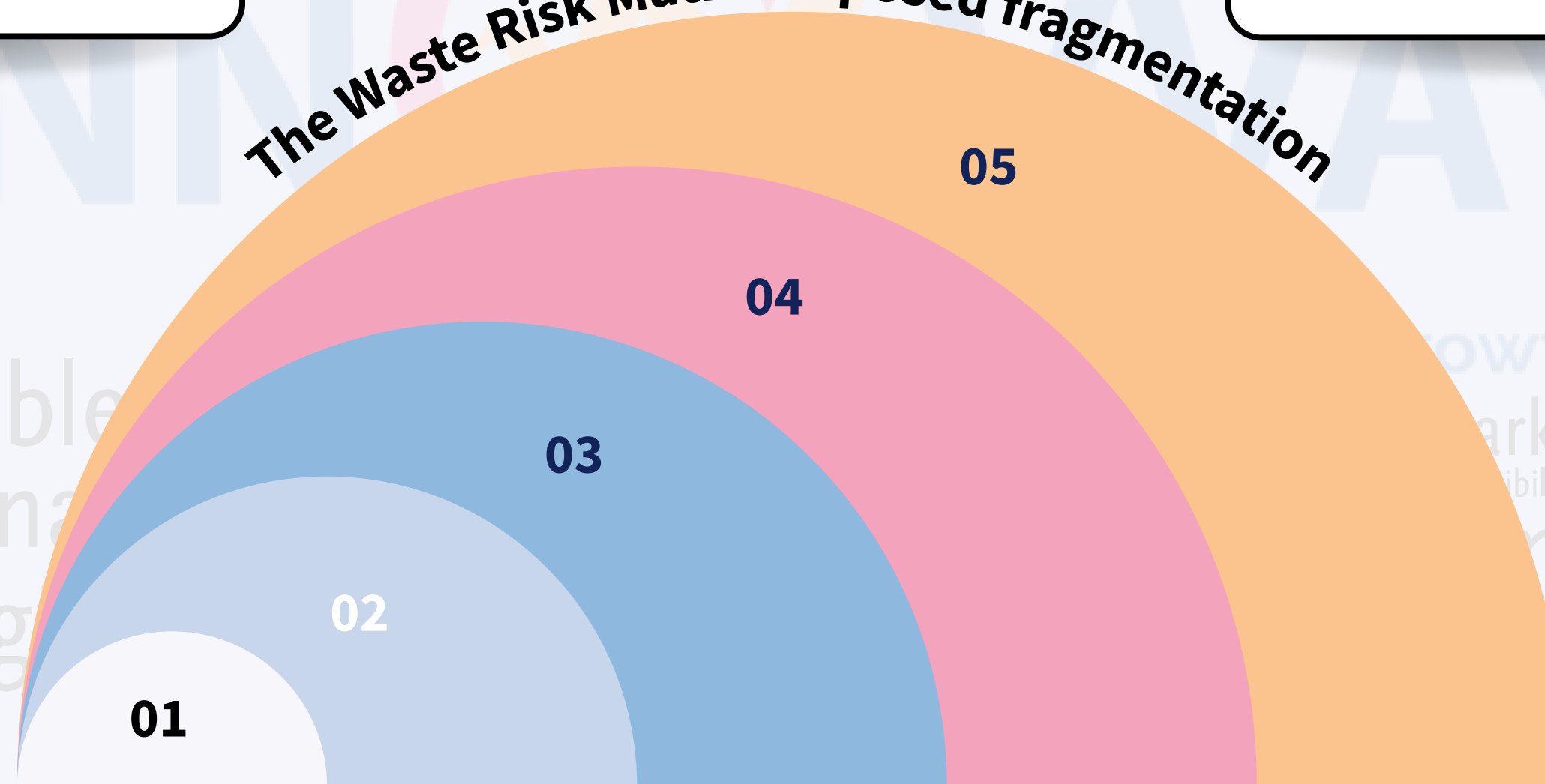
Low-sales / high-waste items require review

Waste Risk Matrix helped identify where waste is not supported by proportionate sales contribution.

92.4% of barcodes had No Sales / Insignificant contribution

The Waste Risk Matrix exposed fragmentation

The matrix helps prioritise action, not just describe waste



Key Findings



Old Barcodes

Retained items formed the core of activity and generated the majority of sales.



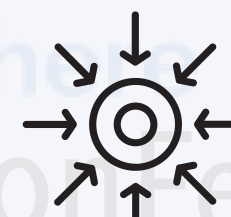
Assortment Stabilisation

New barcode activity declined by 2023 as selected introductions were absorbed into the recurring assortment.



Vegetable Movement

Fresh Vegetables showed a larger and more dynamic barcode base than Fresh Fruits.



Supplier Concentration

One Anchor Supplier generated majority of commercial value.

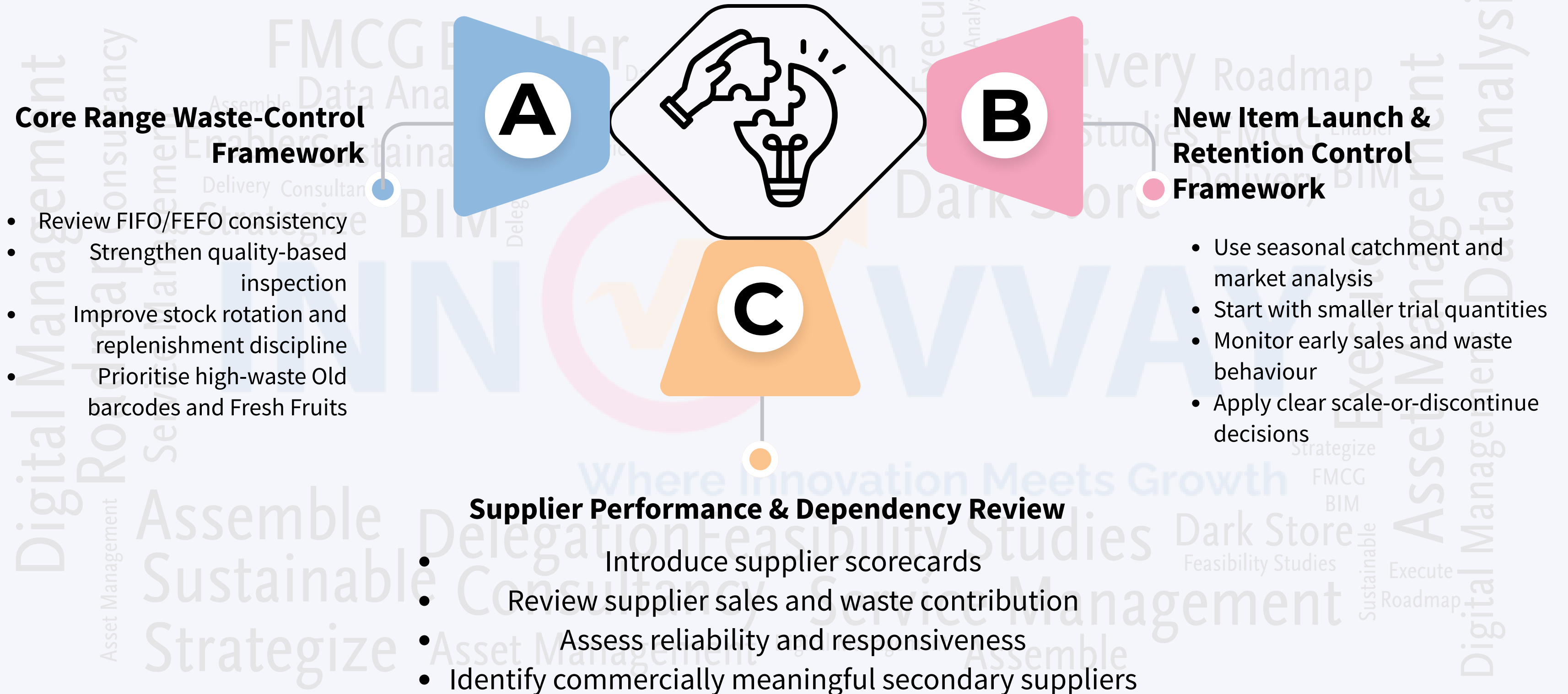


Waste Management

Old barcodes hold the largest waste opportunity, while Actual New Items carry the highest waste-risk rate.

The category matured, but optimisation opportunities remained across core range control, launch discipline, supplier review, and waste-risk prioritisation.

Data Led Recommendations



The recommendation is not broad expansion, but structured control of core items, new launches, and supplier dependency.

Thank you

