

INTERNATIONAL
**FRESH
PRODUCE**
ASSOCIATIONSM

**SNAP: USDA Supplemental
Nutrition Assistance Program**



IFPA continues to advocate to increase fruit and vegetable access for SNAP recipients. Citing USDA research, IFPA suggests incentivizing produce purchases through the Supplemental Nutrition Assistance Program (SNAP) to help recipients meet dietary recommendations.



IFPA research with Circana indicates there is a large market opportunity in SNAP participants, but with reduced purchase frequency and spending, the industry must work on increasing basket size and frequency through promotions or incentives.



What is SNAP

The USDA Supplemental Nutrition Assistance Program (SNAP) provides supplemental food benefits to low-income families to supplement their grocery budget so they can afford nutrition food essential to health and well being.

SNAP covers all food and beverage with exception of alcohol and hot prepared foods.



SNAP

- Largest U.S. nutrition assistance program, accounting for 68% of USDA nutrition assistance spending in fiscal year (FY) 2023, totaling \$112.8 billion.
- Benefits averaged \$211.93 per participant per month in 2023



Eligibility

Households must apply in the state in which they live and meet federal guidelines including resource and income limits which are updated annually.

- Households typically must have a gross income at or below 130% of the poverty line.

Benefits range from 1 month to 3 years, with most beneficiaries remaining on SNAP for 6 months before they need to renew.



SNAP Recipients – 12.3% of U.S. population

41.7 million people



22.2 million households



14 million children



(2024)



Nation's largest nutrition assistance program, accounting for 68% of USDA nutrition assistance spending in fiscal year (FY) 2023.



SNAP acceptance

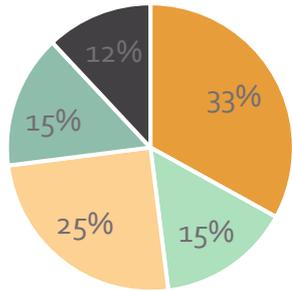
- Grocery stores
- Convenience Stores
- Farmer's markets
- Dollar Stores
- Pharmacies
- Dollar Stores

*retailers must meet USDA requirements, including minimum stocking standards and compliance with rules and regulations



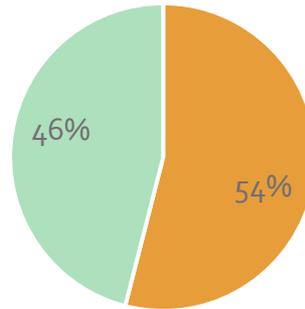
SNAP Recipients' demographics

Recipient Age



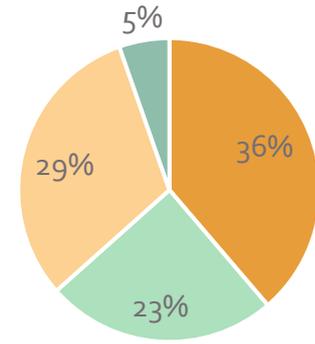
- Under 18
- 18-29
- 30-49
- 50-35
- 65 and older

Recipient Gender



- Women
- Men

Recipient Race



- Non Hispanic White
- African American
- Hispanic
- Asian



States with largest percentage of SNAP recipients

	Share of individuals receiving SNAP benefits	Share of households receiving SNAP benefits	Average monthly SNAP benefit per individual	Average monthly SSNAP benefit per household
New Mexico	21.3%	28.2%	\$190	\$354
Louisiana	18.5%	22.8%	\$187	\$380
Oregon	17.9%	24.9%	\$176	\$305
Oklahoma	16.9%	21.0%	\$183	\$375
Massachusetts	15.9%	24.2%	\$196	\$321
Nevada	15.8%	22.0%	\$166	\$311
West Virginia	15.7%	19.9%	\$170	\$319
Pennsylvania	15.4%	20.3%	\$178	\$329
Illinois	15.4%	20.9%	\$192	\$351
New York	15.0%	21.9%	\$209	\$359



States with largest percentage of SNAP recipients

	Share of individuals receiving SNAP benefits	Share of households receiving SNAP benefits	Average monthly SNAP benefit per individual	Average monthly SSNAP benefit per household
Alabama	14.7%	18.3%	\$192	\$384
Michigan	14.7%	19.1%	\$173	\$325
California	13.8%	22.8%	\$192	\$330
Florida	13.2%	18.4%	\$185	\$333
Rhode Island	13.2%	20.3%	\$199	\$318
Kentucky	13.2%	14.9%	\$161	\$347
Mississippi	13.1%	16.4%	\$182	\$366
North Carolina	13.1%	16.1%	\$173	\$347
Georgia	12.8%	16.5%	\$193	\$399
Arizona	12.4%	15.6%	\$182	\$370



SNAP programs

- USDA SUN Program: Summer nutrition for kids under 18.
- D-SNAP: Disaster Supplemental Nutrition Assistance Program



ERS study indicated \$1 billion increase in SNAP benefits would increase GDP by 1.54 billion and support 13,560 jobs and boost agricultural income by \$32 million during a slowing economy.



Produce purchase from SNAP Recipients

Fresh Produce

98% of SNAP households

Spend 35% less dollars per buyer than Non SNAP
(\$542.82 down \$10.50 vs. YA)

26% less product trips per buyer than NON SNAP
(69.3 flat vs YA)

Fresh Vegetables

97% of SNAP households

Spend 35% less dollars per buyer than Non SNAP
(\$254.23 down \$10.40 vs. YA)

28% less product trips per buyer than NON SNAP
(45 down .6 vs YA)

Fresh Fruit

98% of SNAP households

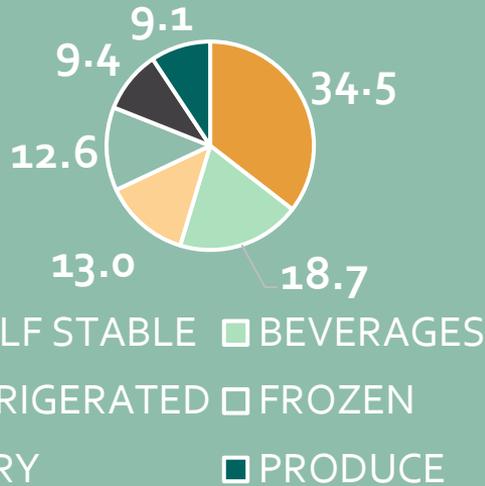
Spend 33% less dollars per buyer than Non SNAP
(\$294.56 up \$1.30 vs. YA)

29% less product trips per buyer than NON SNAP
(46.7 down .4 vs YA)

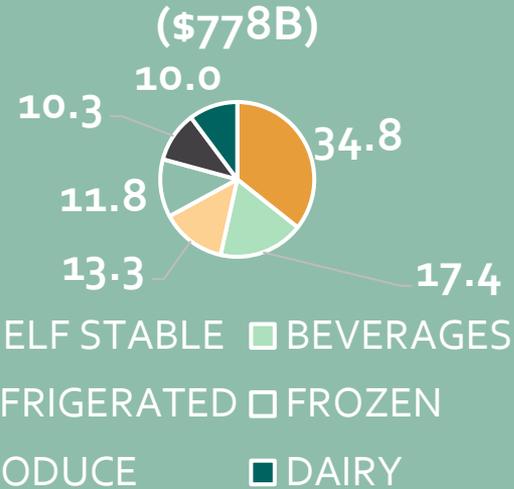


SNAP households purchase .9% less produce than non-snap households

% SNAP DOLLARS SPENT OF TOTAL STORE MINUS LIQUOR (\$200B)



% NON-SNAP DOLLARS SPENT OF TOTAL STORE MINUS LIQUOR



Appendix – Deep dive into commodities purchased through SNAP



SNAP HH's increased dollars spent per buyer in Fresh Onions, Broccoli, Squash, Cabbage and Spinach.



	HHP	Dollars per Buyer	% Change vs YA	% Difference from Non-SNAP	Trips per Buyer	% Change vs YA	% Difference from Non-SNAP
FRESH POTATOES	79.6	\$36.18	-9.6	-15%	9.3	-2.0	-19%
FRESH ONIONS	76.2	\$28.27	2.8	-21%	13.1	0.0	-23%
FRESH TOMATOES	72.9	\$38.73	-2.0	-27%	14.3	-1.2	-21%
FRESH LETTUCE	72.7	\$27.49	-3.7	-29%	9.6	-4.8	-22%
FRESH CARROTS	66.7	\$13.01	-2.7	-32%	6.1	-2.4	-31%
FRESH PEPPERS	65.6	\$25.33	-1.6	-34%	9.6	-2.1	-30%
FRESH CUCUMBERS	57.8	\$19.43	-2.2	-29%	9.8	-6.3	-27%
RW AO FRESH VEGETABLES	56.1	\$29.03	-0.6	-20%	10.3	1.6	-22%
FRESH CELERY	54.2	\$11.06	-7.1	-22%	4.9	-7.2	-21%
FRESH SALADS-KITS	44.5	\$42.67	-4.9	-21%	7.3	0.8	-16%
FRESH CORN	42.5	\$12.40	-2.4	-21%	4.4	-1.2	-25%
FRESH BROCCOLI	40.8	\$17.68	0.7	-32%	5.9	-1.3	-33%
FRESH SQUASH	39.4	\$14.97	1.1	-23%	5.0	-2.2	-28%
FRESH CABBAGE	39.1	\$10.17	2.6	-15%	4.2	-0.6	-14%
FRESH MUSHROOMS	38.2	\$19.38	-6.8	-27%	6.0	-5.4	-28%
FRESH SPINACH	35.7	\$14.35	1.0	-33%	4.6	-3.9	-32%
FRESH SALADS-GARDEN	31.2	\$15.01	-0.1	-23%	4.7	-1.2	-18%

CONTINUED: SNAP HH's increased spend in Fresh Garlic, Pumpkins, Radishes and Brussel Sprouts which show deeper opportunity is possible to diversify their produce spend



	HHP	Dollars per Buyer	% Change vs YA	% Difference from Non-SNAP	Trips per Buyer	% Change vs YA	% Difference from Non-SNAP
FRESH BEANS	26.0	\$12.91	-9.6	-25%	3.8	-2.0	-27%
FRESH GARLIC	24.7	\$10.92	2.8	-12%	3.6	0.0	-9%
FRESH SALADS-BLENDS	18.8	\$13.60	-2.0	-30%	3.3	-1.2	-25%
AO FRESH MIXED VEGETABLES	18.1	\$15.34	-3.7	-19%	2.7	-4.8	-19%
FRESH CAULIFLOWER	17.9	\$10.41	-2.7	-31%	3.1	-2.4	-30%
FRESH CILANTRO	17.5	\$8.62	-1.6	26%	5.3	-2.1	-13%
FRESH ASPARAGUS	15.1	\$10.63	-2.2	-22%	2.3	-6.3	-26%
FRESH COOKING GREENS	14.9	\$9.70	-0.6	-16%	3.1	1.6	-17%
FRESH SALADS-SLAW	14.3	\$6.50	-7.1	-26%	2.6	-7.2	-23%
FRESH SWEET POTATOES/YAMS	13.7	\$11.47	-4.9	-13%	2.7	0.8	-19%
FRESH MIXED LEAFY GREENS	13.7	\$13.83	-2.4	-26%	3.3	-1.2	-23%
FRESH PUMPKINS	12.2	\$12.88	0.7	12%	1.5	-1.3	-2%
FRESH RADISHES	11.6	\$6.25	1.1	-24%	3.2	-2.2	-29%
FRESH BRUSSELS SPROUTS	10.2	\$9.80	2.6	-34%	2.2	-0.6	-37%

SNAP HH's increased \$/buyer in Fresh Berries, Mandarins, Bulk (RW) All Other Fresh Citrus, Avocados, Stone Fruit and Pineapples even though these fruits are more expensive than more basic alternatives



	HH P	Dollars per Buyer	% Change vs YA	% Difference from Non-SNAP	Trips per Buyer	% Change vs YA	% Difference from Non-SNAP
FRESH BANANAS	80.2	\$30.31	-3.9	-27%	22.8	-0.4	-29%
FRESH BERRIES	75.8	\$83.91	3.3	-34%	14.0	2.1	-32%
FRESH GRAPES	71.4	\$44.88	-3.1	-27%	9.8	2.0	-23%
FRESH APPLES	70.6	\$40.52	-6.6	-27%	9.4	-6.2	-27%
FRESH MELONS	67.4	\$42.27	-14.8	-17%	8.1	-12.5	-18%
FRESH MANDARINS	49.5	\$31.40	9.8	-14%	5.9	6.1	-17%
RW AO FRESH CITRUS	49.0	\$12.74	0.3	-12%	7.5	6.0	-19%
FRESH AVOCADOS	48.0	\$38.80	14.5	-32%	11.8	3.3	-28%
FRESH ORANGES	46.8	\$20.03	-8.3	-22%	4.6	-5.1	-19%
FRESH PEACH/NECTARINE/PLUM	43.0	\$21.00	4.1	-24%	4.8	2.6	-24%
FRESH PINEAPPLES	41.7	\$20.73	2.6	-16%	5.5	0.3	-22%

**CONTINUED: SNAP HH's increased \$/buyer in Fresh Cherries, Pears, Kiwis, and Limes
although fruit mixes and fresh lemons purchasing declined**



	HH P	Dollars per Buyer	% Change vs YA	% Difference from Non-SNAP	Trips per Buyer	% Change vs YA	% Difference from Non-SNAP
RW AO FRESH FRUIT	36.4	\$15.31	5.7	0%	2.8	-3.2	-9%
FRESH CHERRIES	34.6	\$20.12	0.3	-27%	3.2	0.5	-21%
FRESH LEMONS	24.4	\$22.24	-5.1	-10%	5.1	-7.6	-12%
FRESH PEARS	20.4	\$13.98	6.6	-26%	3.9	-2.4	-24%
FRESH MIXED FRUIT	18.3	\$49.39	-7.9	4%	5.7	-10.4	4%
FRESH KIWIS	16.5	\$16.88	21.5	-25%	3.1	22.5	-13%
FRESH LIMES	14.1	\$26.18	27.2	-6%	5.9	14.9	-14%
FRESH GRAPEFRUIT	10.6	\$11.24	-11.6	-30%	2.9	-5.9	-17%
FRESH MANGOES	9.8	\$23.63	-16.8	-40%	3.8	-10.9	-26%

SNAP Methodology in Integrated Fresh Scan Panel

How are SNAP Households identified in IF Scan Panel?

- SNAP households are identified via Circana's Omnibus surveys (i.e. survey questions sent to all household panelists)
- Panelists are asked whether anyone in their household participates in SNAP.
- The survey captures point-in-time participation. The survey is fielded to Scan panelists every 6 months.

How are SNAP Households weighted?

Households who responded to the SNAP survey are demographically weighted and projected to represent all US Households.

Can I limit my analysis to items or trips that were purchased using SNAP benefits?

No. The SNAP survey identifies panelists who were SNAP participants, but trip level detail is not available. Purchase metrics for these panelists reflect their overall purchases, not just the items or trips that were purchased using SNAP benefits.