



**Avocado Regional Composite
California Region**

January – March: 2009 vs. 2010



Methodology

- **Sales and Market Data is obtained using CAST**
- **(Category Avocado Sales Trend)**
 - Information Resources Inc. gathers chain-wide sales across all RMAs (Retail Market Areas)
 - Regional figures include data collected from all reporting retailers, as well as imputed data (non-reporting retailers such as club, warehouse and independent stores) for a total of 100% of retail sales for the area
 - Data is entered into CAST system
 - Using CAST, data is queried and reported
- **Average Selling Price (ASP) is not Advertised Retail Price**
 - Average selling price is the average of all prices including coupons, promotional pricing, club/loyalty card deals that are given at the register at the time of purchase
- **Analysis is based on a Calendar Year (Jan – Mar) unless otherwise noted**
- **Total U.S. totals and averages utilized in comparisons includes all U.S. regions**
- **Retail data provided by IRI / FreshLook Marketing**
- **Important Note: Due to the fact that IRI / FreshLook recently restated all retail data, this review cannot be compared or used in conjunction with prior reviews**





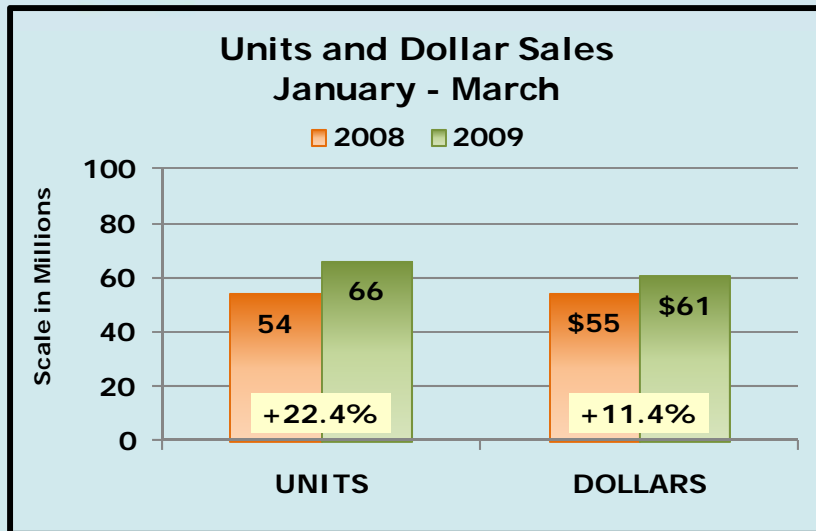
California: Region Highlights

- **Overview based on the following IRI markets:**
 - Los Angeles; Sacramento; San Diego; San Francisco
- **California Overview**
 - Category unit and dollar trends exhibited consecutive growth in 2009 and 2010
 - Units: +22% in 2009, and +34% in 2010
 - Dollars: +11% in 2009, and +8% in 2010
 - Category average selling price (ASP) exhibited consecutive price declines of -9% to \$0.92/unit in 2009, and -20% to \$0.74/unit in 2010
 - The rolling 12-month average was 24.88 million units per month and ASP of \$0.84/unit
 - Volume peaked in Jan'10 with over 32.85 million units sold
 - ASP was the lowest during Feb'10 at \$0.71/unit
- **California versus Total U.S. trends**
 - California's category unit trend of +34% outpaced the national average by +5 points
 - CA's PLU 4046 unit trend of +149% was the main driver of this increase, +13.0 million units
 - Category dollar trend of +7.6% was -4 points below the national average
 - California's 2010 category ASP of \$0.74/unit was -12% lower than the national average of \$0.83/unit

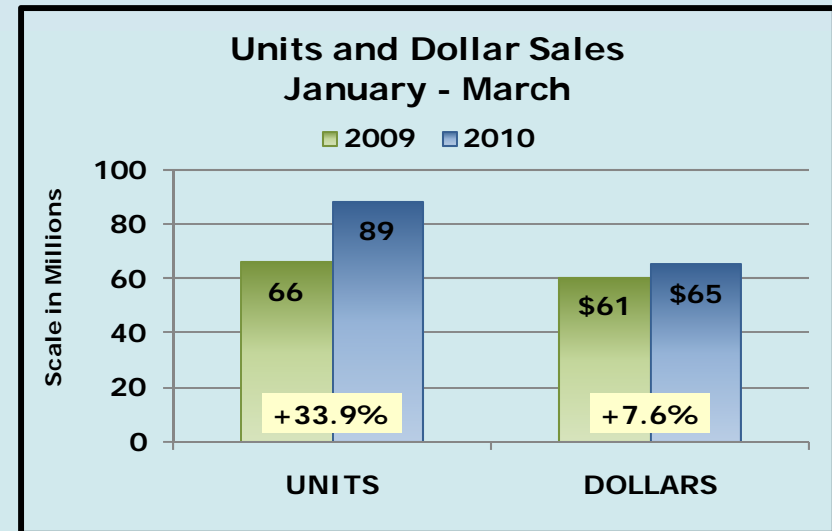




California: Region Retail Sales Overview



Jan-Mar	2008	2009	08v09
Category ASP/Unit	\$ 1.01	\$ 0.92	-9.0%



Jan-Mar	2009	2010	09v10
Category ASP/Unit	\$ 0.92	\$ 0.74	-19.6%

- Category units experienced consecutive double-digit growth of +22% in 2009, and +34% in 2010
- Category dollars experienced consecutive growth of +11% in 2009, and +8% in 2010
- Category average selling price (ASP) experienced consecutive price declines of -9% to \$0.92/unit in 2009, and -20% to \$0.74/unit in 2010





California vs. Total U.S.: PLU Comparisons January – March: 2009 vs. 2010

JANUARY - MARCH: 2009 vs 2010

UNITS		California			Total U.S.		
PLU	Description	2009	2010	Variance	2009	2010	Variance
4046	Small Hass #60 sizes & smaller	8,766	21,779	+148.5%	90,883	118,234	+30.1%
4225	Large Hass #40 & #48 sizes	45,344	53,494	+18.0%	149,511	191,033	+27.8%
4770	X-Large Hass #36 sizes & larger	513	642	+25.1%	8,713	16,195	+85.9%
Other	Greenskins, Pinkertons, non-Hass PLUs	19	29	+57.1%	7,939	7,968	+0.4%
Organic	All Organic PLUs	320	947	+196.0%	2,761	3,743	+35.6%
Bags	All bagged PLUs	11,137	11,641	+4.5%	27,085	33,227	+22.7%
TOTAL CATEGORY UNITS (add '000s)		66,099	88,531	+33.9%	286,891	370,400	+29.1%
DOLLARS		California			Total U.S.		
PLU	Description	2009	2010	Variance	2009	2010	Variance
4046	Small Hass #60 sizes & smaller	\$ 5,976	\$ 13,874	+132.1%	\$ 69,226	\$ 79,854	+15.4%
4225	Large Hass #40 & #48 sizes	\$ 48,742	\$ 45,649	-6.3%	\$ 164,597	\$ 181,304	+10.1%
4770	X-Large Hass #36 sizes & larger	\$ 1,471	\$ 1,825	+24.1%	\$ 14,173	\$ 19,940	+40.7%
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 30	\$ 22	-27.1%	\$ 13,422	\$ 13,289	-1.0%
Organic	All Organic PLUs	\$ 555	\$ 925	+66.7%	\$ 4,441	\$ 5,133	+15.6%
Bags	All bagged PLUs	\$ 3,955	\$ 3,065	-22.5%	\$ 9,697	\$ 9,514	-1.9%
TOTAL CATEGORY DOLLARS (add '000s)		\$ 60,730	\$ 65,360	+7.6%	\$ 275,556	\$ 309,034	+12.1%
AVERAGE SELLING PRICE (ASP) / UNIT		California			Total U.S.		
PLU	Description	2009	2010	Variance	2009	2010	Variance
4046	Small Hass #60 sizes & smaller	\$ 0.68	\$ 0.64	-6.6%	\$ 0.76	\$ 0.68	-11.3%
4225	Large Hass #40 & #48 sizes	\$ 1.07	\$ 0.85	-20.6%	\$ 1.10	\$ 0.95	-13.8%
4770	X-Large Hass #36 sizes & larger	\$ 2.87	\$ 2.84	-0.8%	\$ 1.63	\$ 1.23	-24.3%
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 1.63	\$ 0.76	-53.6%	\$ 1.69	\$ 1.67	-1.4%
Organic	All Organic PLUs	\$ 1.73	\$ 0.98	-43.7%	\$ 1.61	\$ 1.37	-14.8%
Bags	All bagged PLUs	\$ 0.36	\$ 0.26	-25.9%	\$ 0.36	\$ 0.29	-20.0%
CATEGORY ASP		\$ 0.92	\$ 0.74	-19.6%	\$ 0.96	\$ 0.83	-13.1%

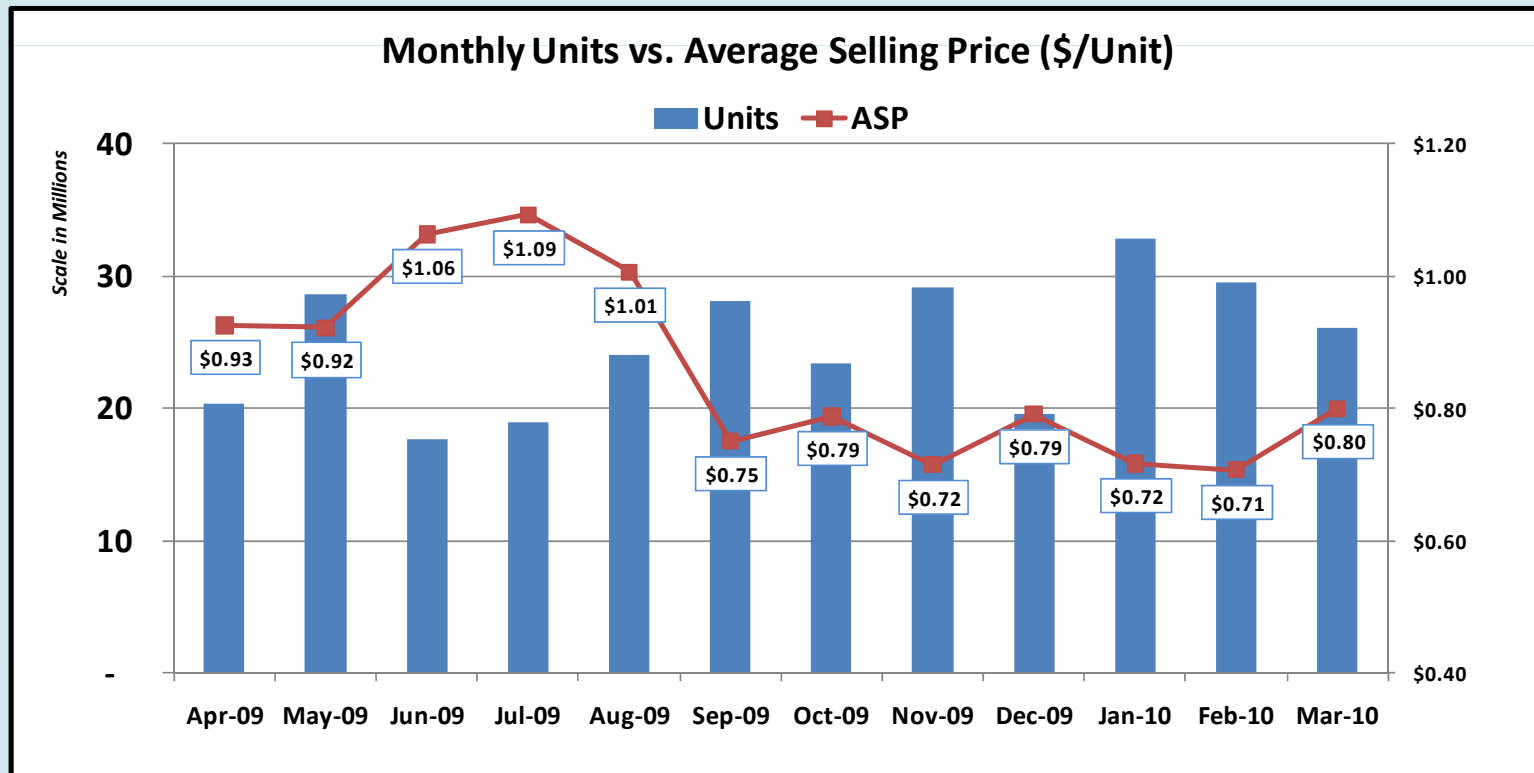
- CA's category unit trend of +34% outpaced the national average by +5 points**
 - CA's PLU 4046 was the main driver of this growth, +13.0 million units
 - CA's PLU 4046 trend of +149% was +119 points higher than the national average of +30%
 - CA's PLU 4225, their #1 selling segment, unit trend of +18%, was -10 points lower than the national average of +28%
- CAs category dollar trend of +8% was -4 points below the national average of +12%**
 - CA's PLU 4225, their #1 selling segment, dollar trend of -6% was -16 points below the national average of +10%
- CA's 2010 category ASP of \$0.74/unit was -12% lower than the national average of \$0.83/unit**
 - All segments experienced ASP declines in 2010, from 2009, decreasing category ASP -20%





California Total Category by Month: Units to ASP (rolling 12-months)

- The rolling 12-month average was 24.88 million units per month and \$0.84/unit
 - The recent 6-months (Oct'09-Mar'10) showed an average of 26.77 million units each month, +16% gain over the prior 6-months average of 22.99 million units
 - Jan'10 was the peak of the 12 months observed with over 32.85 million units sold, and this may be because of the New Year's celebration and people preparing for the Super Bowl
- ASP was the lowest on Feb'10 at \$0.71/unit
 - The recent 6-months (Oct'09-Mar'10) showed an ASP of \$0.75/unit, -21% lower than the prior 6-months when the ASP was \$0.94/unit





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Appendix

- **Retail scan data is collected and entered into CAST approximately every 4-6 weeks**
 - Data collection began in 1997
 - Data is collected and distributed by Information Research, Inc. (IRI) / FreshLook Marketing
 - Data is scrubbed and reviewed for accuracy prior to entry
- **Total U.S. totals and averages utilized in comparisons includes all U.S. regions**
- **Other data is analyzed by CA Avocado Commission's Data Analyst (Fusion Marketing) in conjunction with CAC personnel**
- **Analysis is based on a Calendar Year (Jan-Mar) unless otherwise noted**

