



Avocado Regional Composite Great Lakes 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**





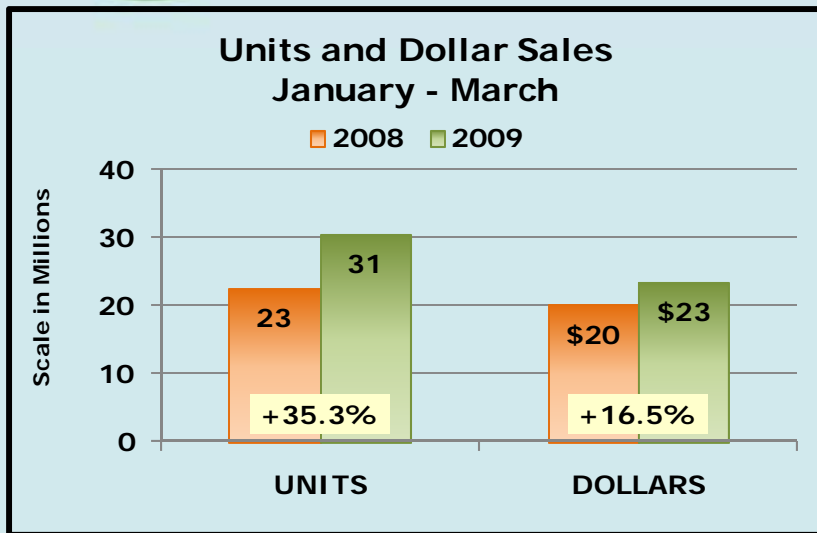
Great Lakes: Region Highlights

- **Overview based on the following IRI markets:**
 - Chicago, IL; Cincinnati, OH; Cleveland, OH; Columbus, OH; Detroit, MI
- **Great Lakes Overview**
 - Category units experienced consecutive double-digit growth of +35% in 2009, and +26% in 2010
 - Category dollars experienced consecutive double-digit growth of +17% in 2009, and +19% in 2010
 - Category average selling price (ASP) experienced consecutive price declines of -14% to \$0.77/unit in 2009, and -5% to \$0.73/unit in 2010
- **Great Lakes versus Total U.S. trends**
 - Great Lakes' unit trend of +26% was -3 points below the national average
 - Great Lakes' dollar trend of +19% outperformed the national average by +7 points
 - Great Lakes' PLU 4770, the main driver of this increase, dollar trend of +128% was +87 points higher than the national average of +41%
 - All of the Great Lakes' sizes/segments grew in volume and dollars except for Other avocados, which decreased -54% in units and -44% in dollars
 - Great Lakes' 2010 category ASP of \$0.73/unit was -13% lower than the national average of \$0.83/unit

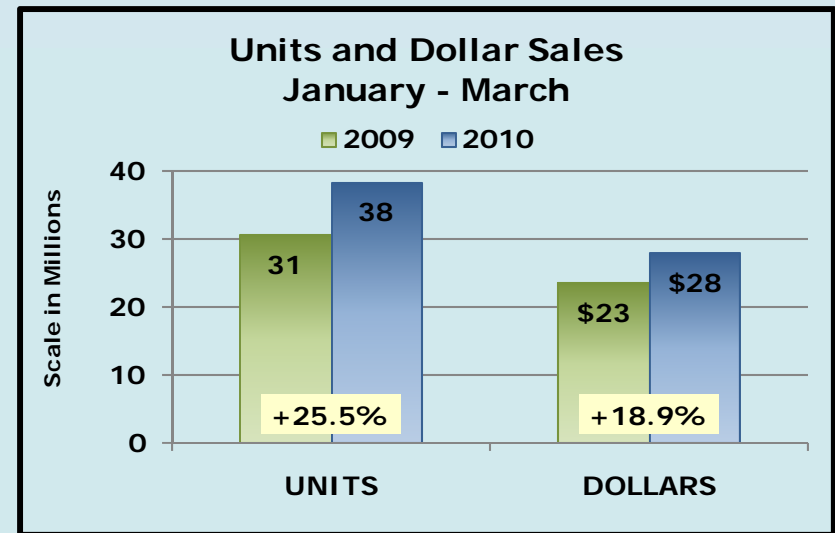




Great Lakes: Region Retail Sales Overview



Jan-Mar	2008	2009	08v09
Category ASP/Unit	\$ 0.89	\$ 0.77	-13.9%



Jan-Mar	2009	2010	09v10
Category ASP/Unit	\$ 0.77	\$ 0.73	-5.3%

- Category units experienced consecutive double-digit growth of +35% in 2009, and +26% in 2010
- Category dollars experienced consecutive double-digit growth of +17% in 2009, and +19% in 2010
- Category average selling price (ASP) experienced consecutive price declines of -14% to \$0.77/unit in 2009, and -5% to \$0.73/unit in 2010





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

JANUARY - MARCH: 2009 vs 2010

UNITS		Great Lakes			Total U.S.		
PLU	Description	2009	2010	Variance	2009	2010	Variance
4046	Small Hass #60 sizes & smaller	2,158	3,102	+43.7%	90,883	118,234	+30.1%
4225	Large Hass #40 & #48 sizes	23,848	24,363	+2.2%	149,511	191,033	+27.8%
4770	X-Large Hass #36 sizes & larger	1,093	4,436	+305.7%	8,713	16,195	+85.9%
Other	Greenskins, Pinkertons, non-Hass PLUs	317	144	-54.4%	7,939	7,968	+0.4%
Organic	All Organic PLUs	242	363	+50.1%	2,761	3,743	+35.6%
Bags	All bagged PLUs	2,872	5,909	+105.7%	27,085	33,227	+22.7%
TOTAL CATEGORY UNITS (add '000s)		30,530	38,317	+25.5%	286,891	370,400	+29.1%
DOLLARS		Great Lakes			Total U.S.		
PLU	Description	2009	2010	Variance	2009	2010	Variance
4046	Small Hass #60 sizes & smaller	\$ 2,117	\$ 2,940	+38.9%	\$ 69,226	\$ 79,854	+15.4%
4225	Large Hass #40 & #48 sizes	\$ 18,016	\$ 19,355	+7.4%	\$ 164,597	\$ 181,304	+10.1%
4770	X-Large Hass #36 sizes & larger	\$ 1,509	\$ 3,438	+127.8%	\$ 14,173	\$ 19,940	+40.7%
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 463	\$ 262	-43.5%	\$ 13,422	\$ 13,289	-1.0%
Organic	All Organic PLUs	\$ 380	\$ 458	+20.6%	\$ 4,441	\$ 5,133	+15.6%
Bags	All bagged PLUs	\$ 999	\$ 1,465	+46.6%	\$ 9,697	\$ 9,514	-1.9%
TOTAL CATEGORY DOLLARS (add '000s)		\$ 23,484	\$ 27,918	+18.9%	\$ 275,556	\$ 309,034	+12.1%
AVERAGE SELLING PRICE (ASP) / UNIT		Great Lakes			Total U.S.		
PLU	Description	2009	2010	Variance	2009	2010	Variance
4046	Small Hass #60 sizes & smaller	\$ 0.98	\$ 0.95	-3.4%	\$ 0.76	\$ 0.68	-11.3%
4225	Large Hass #40 & #48 sizes	\$ 0.76	\$ 0.79	+5.2%	\$ 1.10	\$ 0.95	-13.8%
4770	X-Large Hass #36 sizes & larger	\$ 1.38	\$ 0.78	-43.9%	\$ 1.63	\$ 1.23	-24.3%
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 1.46	\$ 1.81	+23.9%	\$ 1.69	\$ 1.67	-1.4%
Organic	All Organic PLUs	\$ 1.57	\$ 1.26	-19.6%	\$ 1.61	\$ 1.37	-14.8%
Bags	All bagged PLUs	\$ 0.35	\$ 0.25	-28.7%	\$ 0.36	\$ 0.29	-20.0%
CATEGORY ASP		\$ 0.77	\$ 0.73	-5.3%	\$ 0.96	\$ 0.83	-13.1%

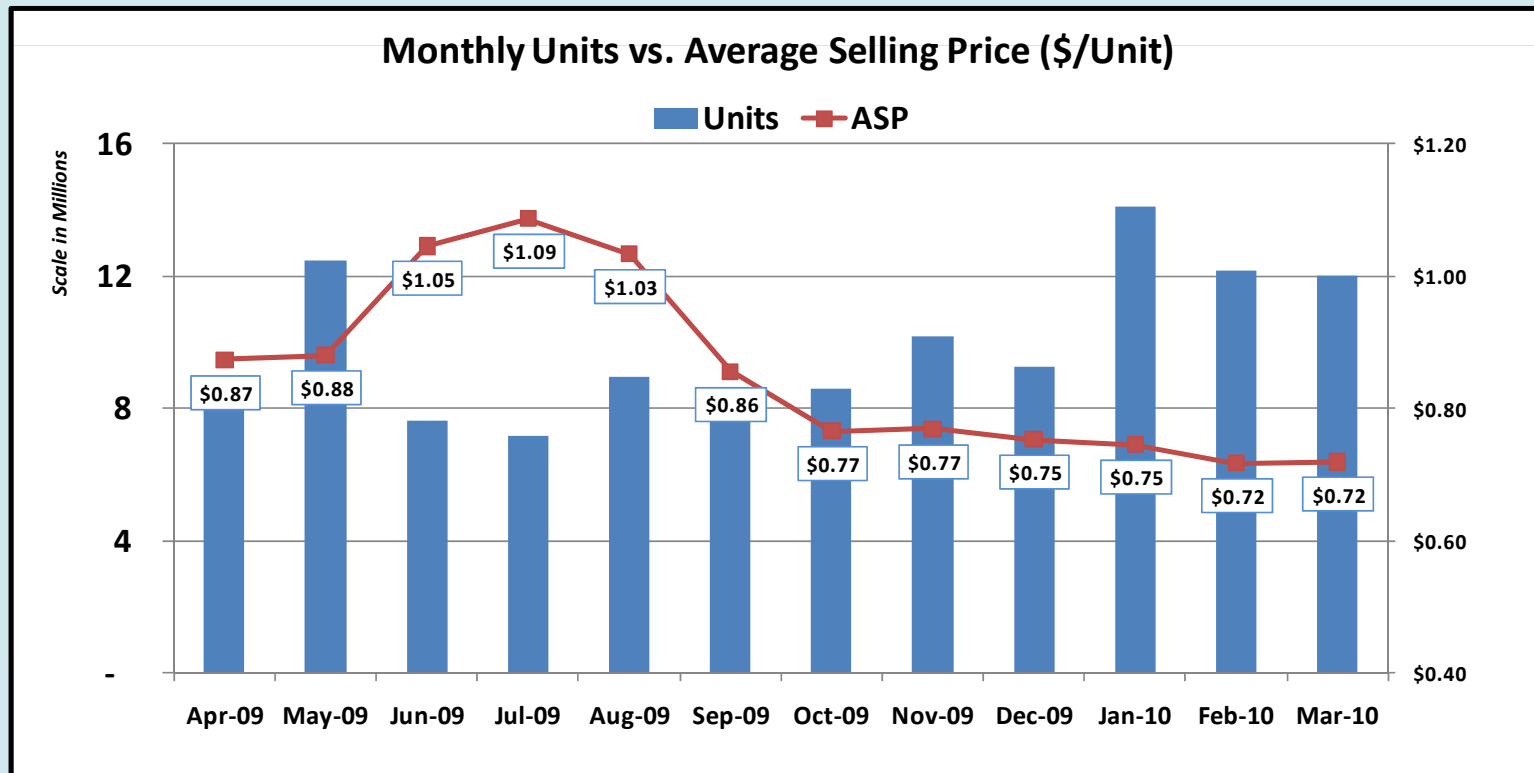
- Great Lakes' unit trend of +26% was -3 points below the national average of +29%
- Great Lakes' dollar trend of +19% outperformed the national average by +7 points
 - PLU 4770 was the main driver of this increase, +\$1.93 million
 - PLU 4770 trend of +128% outperformed the national average by +87 points
- All of the Great Lakes' sizes/segments grew in volume and dollars except for Other avocados, which was down -54% in units and -44% in dollars
 - Other avocados showed a +24% increase in ASP, which may have contributed to its decline in unit and dollar trends
- Great Lakes' 2010 category ASP of \$0.73/unit was -13% lower than the national average of \$0.83/unit





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

- **The rolling 12-month average was 9.95 million units per month and \$0.84/unit**
 - The recent 6-months (Oct'09-Mar'10) showed an average of 11.06 million units each month, +25% gain over the prior 6-months average of 8.84 million units
 - Jan'10 was the peak of the 12 months observed with over 14.11 million units sold, and this may be because of the New Year's celebration and people preparing for the Super Bowl
- **ASP was lowest in Feb'10 & Mar'10 at \$0.72/unit**
 - The recent 6-months (Oct'09-Mar'10) showed an ASP of \$0.74/unit, -22% lower than the prior 6-months which had an ASP of \$0.95/unit





Great Lakes: Region Highlights

- **Overview based on the following IRI markets:**
 - Chicago, IL; Cincinnati, OH; Cleveland, OH; Columbus, OH; Detroit, MI
- **Great Lakes Overview**
 - Category units experienced consecutive double-digit growth of +35% in 2009, and +26% in 2010
 - Category dollars experienced consecutive double-digit growth of +17% in 2009, and +19% in 2010
 - Category average selling price (ASP) experienced consecutive price declines of -14% to \$0.77/unit in 2009, and -5% to \$0.73/unit in 2010
- **Great Lakes versus Total U.S. trends**
 - Great Lakes' unit trend of +26% was -3 points below the national average
 - Great Lakes' dollar trend of +19% outperformed the national average by +7 points
 - Great Lakes' PLU 4770, the main driver of this increase, dollar trend of +128% was +87 points higher than the national average of +41%
 - All of the Great Lakes' sizes/segments grew in volume and dollars except for Other avocados, which decreased -54% in units and -44% in dollars
 - Great Lakes' 2010 category ASP of \$0.73/unit was -13% lower than the national average of \$0.83/unit





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**

