



## Avocado Regional Composite

# Great Lakes Region

January – September: 2008 vs. 2009



## 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-Dec) unless otherwise noted**
- **Total US 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***





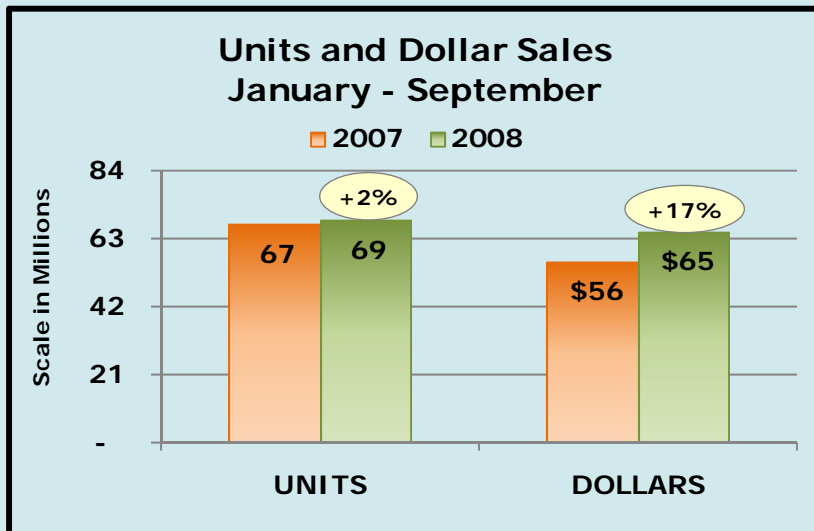
## *Great Lakes: Region Highlights*

- **Overview based on the following IRI markets:**
  - Chicago, IL; Cincinnati, OH; Cleveland, OH; Columbus, OH; Detroit, MI
- **Great Lakes Overview**
  - Category units experienced consecutive growth of +2% in 2008 and +22% in 2009
  - Category dollars also experienced consecutive growth of +17% in 2008 and +14% in 2009
  - Category average selling price (ASP) increased +14% to \$0.95/unit in 2008, but declined -6% to \$0.89/unit in 2009
- **Great Lakes versus Total US trends**
  - Great Lakes' unit trend of +22% was +3 points above the national average
  - Great Lakes' dollar trend of +14% outpaced the national average by +1 points
  - All of the Great Lakes' sizes/segments grew in volume and dollars except for PLU 4770 which was down -17% in units and -6% in dollars
  - Great Lakes' 2009 category ASP of \$0.89/unit was -15% lower than the national average of \$1.04/unit

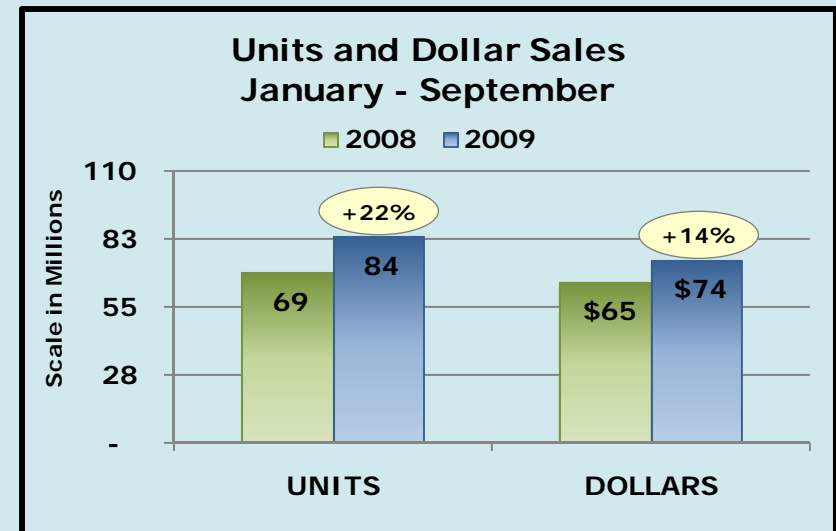




## Great Lakes: Region Retail Sales Overview



Jan-Sep	2007	2008	07v08
Category ASP/Unit	\$ 0.83	\$ 0.95	14%



Jan-Sep	2008	2009	08v09
Category ASP/Unit	\$ 0.95	\$ 0.89	-6%

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# Great Lakes vs. Total US: PLU Comparisons January – September: 2008 vs. 2009

JANUARY - SEPTEMBER: 2008 vs 2009

UNITS		Great Lakes			Total US		
PLU	Description	2008	2009	Variance	2008	2009	Variance
4046	Small Hass #60 sizes & smaller	2,699	6,342	135.0%	224,505	258,720	15.2%
4225	Large Hass #40 & #48 sizes	48,887	59,405	21.5%	344,268	428,888	24.6%
4770	X-Large Hass #36 sizes & larger	5,899	4,893	<b>-17.1%</b>	26,703	29,703	11.2%
Other	Greenskins, Pinkertons, non-Hass PLUs	782	895	14.4%	18,212	19,622	7.7%
Organic	All Organic PLUs	819	934	14.0%	8,368	9,254	10.6%
Bags	All bagged PLUs	9,660	11,118	15.1%	89,884	102,011	13.5%
<b>TOTAL CATEGORY UNITS (add '000s)</b>		<b>68,747</b>	<b>83,587</b>	<b>21.6%</b>	<b>711,940</b>	<b>848,198</b>	<b>19.1%</b>
DOLLARS		Great Lakes			Total US		
PLU	Description	2008	2009	Variance	2008	2009	Variance
4046	Small Hass #60 sizes & smaller	\$ 2,826	\$ 6,385	125.9%	\$ 204,528	\$ 214,584	4.9%
4225	Large Hass #40 & #48 sizes	\$ 49,809	\$ 55,123	10.7%	\$ 450,663	\$ 537,451	19.3%
4770	X-Large Hass #36 sizes & larger	\$ 6,545	\$ 6,169	<b>-5.7%</b>	\$ 47,304	\$ 49,751	5.2%
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 1,218	\$ 1,344	10.4%	\$ 29,475	\$ 31,396	6.5%
Organic	All Organic PLUs	\$ 1,343	\$ 1,538	14.5%	\$ 14,311	\$ 15,602	9.0%
Bags	All bagged PLUs	\$ 3,392	\$ 3,517	3.7%	\$ 36,226	\$ 35,733	<b>-1.4%</b>
<b>TOTAL CATEGORY DOLLARS (add '000s)</b>		<b>\$ 65,133</b>	<b>\$ 74,076</b>	<b>13.7%</b>	<b>\$ 782,507</b>	<b>\$ 884,519</b>	<b>13.0%</b>
AVERAGE SELLING PRICE (ASP) / UNIT		Great Lakes			Total US		
PLU	Description	2008	2009	Variance	2008	2009	Variance
4046	Small Hass #60 sizes & smaller	\$ 1.05	\$ 1.01	<b>-3.8%</b>	\$ 0.91	\$ 0.83	<b>-9.0%</b>
4225	Large Hass #40 & #48 sizes	\$ 1.02	\$ 0.93	<b>-8.9%</b>	\$ 1.31	\$ 1.25	<b>-4.3%</b>
4770	X-Large Hass #36 sizes & larger	\$ 1.11	\$ 1.26	13.6%	\$ 1.77	\$ 1.67	<b>-5.5%</b>
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 1.56	\$ 1.50	<b>-3.5%</b>	\$ 1.62	\$ 1.60	<b>-1.1%</b>
Organic	All Organic PLUs	\$ 1.64	\$ 1.65	0.5%	\$ 1.71	\$ 1.69	<b>-1.4%</b>
Bags	All bagged PLUs	\$ 0.35	\$ 0.32	<b>-9.9%</b>	\$ 0.40	\$ 0.35	<b>-13.1%</b>
<b>CATEGORY ASP</b>		<b>\$ 0.95</b>	<b>\$ 0.89</b>	<b>-6.5%</b>	<b>\$ 1.10</b>	<b>\$ 1.04</b>	<b>-5.1%</b>

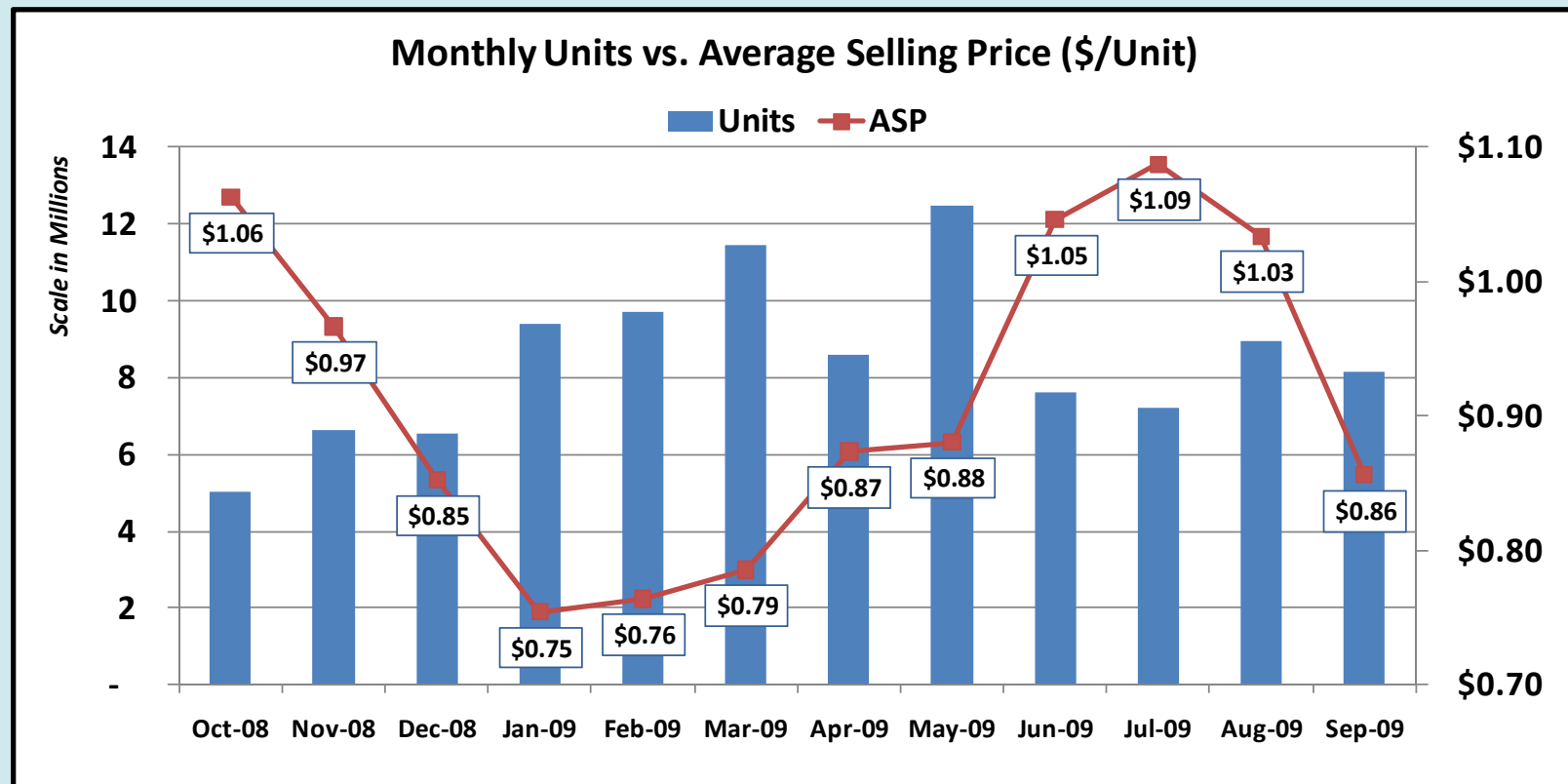
- Great Lakes' unit trend of +22% was +3 points above the national average
  - Great Lakes' unit growth was primarily driven by PLU 4225 which grew by +10.5 million units
- Great Lakes' dollar trend of +14% outpaced the national average by +1 points
- All of the Great Lakes' sizes/segments grew in volume and dollars except for PLU 4770 which was down -17% in units and -6% in dollars
  - PLU 4770 showed a +14% increase in ASP which may have contributed to its unit decline
- Great Lakes' 2009 category ASP of \$0.89/unit was -15% lower than the national average of \$1.04/unit





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

- The rolling 12-month average was 8.48 million units per month and \$0.90/unit
  - The 6-months ending in September showed an average of 8.84 million units each month, +9% gain over the prior 6-month average of 8.12 million units
- ASP was lowest in Q1-09, below \$0.80/unit
  - The 6-months ending in September showed an ASP of \$0.95/unit, +14% higher than the prior 6-months which had an ASP of \$0.84/unit





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  - Great Lakes' 2009 category ASP of \$0.89/unit was -15% lower than the national average of \$1.04/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 US totals and averages utilized in comparisons includes all U.S. regions**
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