

Three avocados are shown on the left side of the slide. One is sliced in half, revealing its green flesh and brown pit. The other two are whole, dark green, and bumpy-skinned.

Avocado Regional Composite Northeast 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**





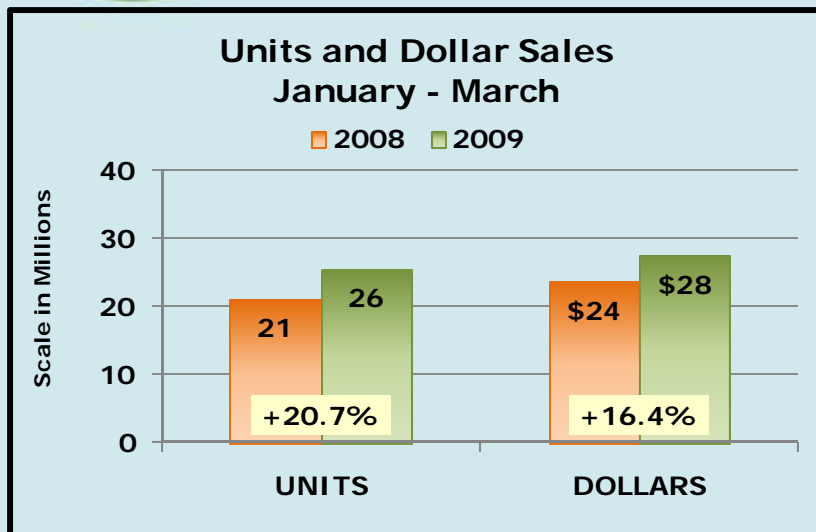
Northeast: Region Highlights

- **Overview based on the following IRI markets:**
 - Albany, NY; Boston, MA; Buffalo, NY; New England; New York; Philadelphia, PA; Pittsburgh, PA
- **Northeast Overview**
 - Category units exhibited consecutive double-digit growth of +21% in 2009, and +38% in 2010
 - Category dollars exhibited consecutive double-digit growth of +16% in 2009, and +20% in 2010
 - Category average selling price (ASP) exhibited consecutive price declines of -4% to \$1.08/unit in 2009, and -13% to \$0.93/unit in 2010
- **Northeast versus Total U.S. trends**
 - Northeast's category unit trend of +38% was +9 points above the national average of +29%
 - Northeast's PLU 4225 unit trend of +43% outpaced the national average by +15 points
 - Northeast's category dollar trend of +20% outpaced the national average by +8 points
 - Northeast's PLU 4225 dollar trend of +23% outpaced the national average by +13 points
 - Northeast's 2010 category ASP of \$0.93/unit was +12% higher than the national average of \$0.83/unit

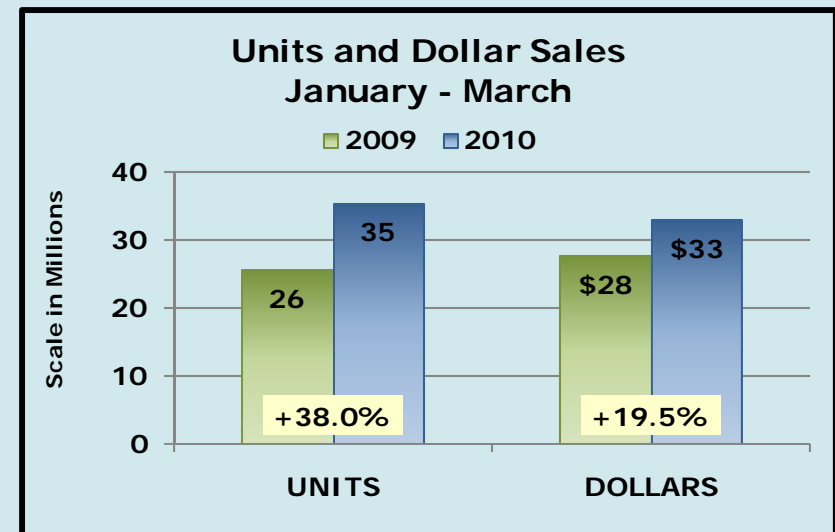




Northeast: Region Retail Sales Overview



Jan-Mar	2008	2009	08v09
Category ASP/Unit	\$ 1.12	\$ 1.08	-3.5%



Jan-Mar	2009	2010	09v10
Category ASP/Unit	\$ 1.08	\$ 0.93	-13.4%

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

JANUARY - MARCH: 2009 vs 2010

UNITS		Northeast			Total U.S.		
PLU	Description	2009	2010	Variance	2009	2010	Variance
4046	Small Hass #60 sizes & smaller	2,842	2,340	-17.7%	90,883	118,234	+30.1%
4225	Large Hass #40 & #48 sizes	15,524	22,231	+43.2%	149,511	191,033	+27.8%
4770	X-Large Hass #36 sizes & larger	178	219	+23.0%	8,713	16,195	+85.9%
Other	Greenskins, Pinkertons, non-Hass PLUs	1,528	2,430	+59.1%	7,939	7,968	+0.4%
Organic	All Organic PLUs	468	365	-22.1%	2,761	3,743	+35.6%
Bags	All bagged PLUs	5,155	7,875	+52.8%	27,085	33,227	+22.7%
TOTAL CATEGORY UNITS (add '000s)		25,695	35,460	+38.0%	286,891	370,400	+29.1%
DOLLARS		Northeast			Total U.S.		
PLU	Description	2009	2010	Variance	2009	2010	Variance
4046	Small Hass #60 sizes & smaller	\$ 2,854	\$ 2,019	-29.3%	\$ 69,226	\$ 79,854	+15.4%
4225	Large Hass #40 & #48 sizes	\$ 19,660	\$ 24,264	+23.4%	\$ 164,597	\$ 181,304	+10.1%
4770	X-Large Hass #36 sizes & larger	\$ 383	\$ 465	+21.4%	\$ 14,173	\$ 19,940	+40.7%
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 2,295	\$ 3,373	+47.0%	\$ 13,422	\$ 13,289	-1.0%
Organic	All Organic PLUs	\$ 703	\$ 565	-19.7%	\$ 4,441	\$ 5,133	+15.6%
Bags	All bagged PLUs	\$ 1,755	\$ 2,366	+34.8%	\$ 9,697	\$ 9,514	-1.9%
TOTAL CATEGORY DOLLARS (add '000s)		\$ 27,651	\$ 33,052	+19.5%	\$ 275,556	\$ 309,034	+12.1%
AVERAGE SELLING PRICE (ASP) / UNIT		Northeast			Total U.S.		
PLU	Description	2009	2010	Variance	2009	2010	Variance
4046	Small Hass #60 sizes & smaller	\$ 1.00	\$ 0.86	-14.1%	\$ 0.76	\$ 0.68	-11.3%
4225	Large Hass #40 & #48 sizes	\$ 1.27	\$ 1.09	-13.8%	\$ 1.10	\$ 0.95	-13.8%
4770	X-Large Hass #36 sizes & larger	\$ 2.15	\$ 2.12	-1.3%	\$ 1.63	\$ 1.23	-24.3%
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 1.50	\$ 1.39	-7.6%	\$ 1.69	\$ 1.67	-1.4%
Organic	All Organic PLUs	\$ 1.50	\$ 1.55	+3.1%	\$ 1.61	\$ 1.37	-14.8%
Bags	All bagged PLUs	\$ 0.34	\$ 0.30	-11.7%	\$ 0.36	\$ 0.29	-20.0%
CATEGORY ASP		\$ 1.08	\$ 0.93	-13.4%	\$ 0.96	\$ 0.83	-13.1%

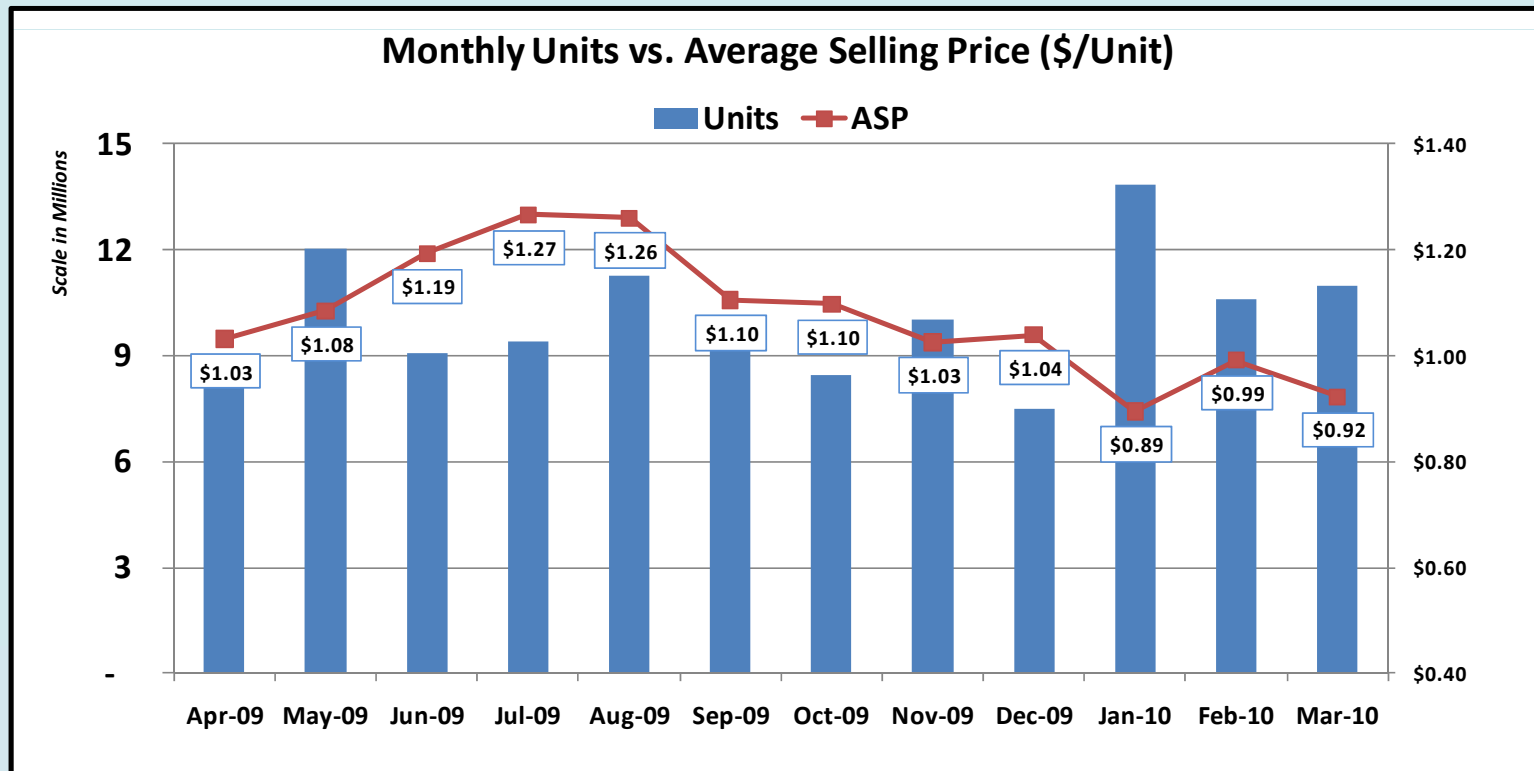
- **Northeast's category unit trend of +38% was +9 points above the national average of +29%**
 - Northeast's +38% unit trend was primarily driven by its #1 selling segment (PLU 4225), which grew +6.71 million units
 - Northeast's PLU 4225 unit trend of +43% outpaced the national average by +15 points
- **Northeast's category dollar trend of +20% outpaced the national average by +8 points**
 - Northeast's +20% trend was primarily driven by PLU 4225, which grew +\$4.60 million
 - Northeast's PLU 4225 dollar trend of +23% outpaced the national average by +13 points
- **Northeast's 2010 category ASP of \$0.93/unit was +12% higher than the national average of \$0.83/unit**
 - All selling segment, except for Organic avocados, experienced ASP declines in 2010, decreasing category ASP -13%





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

- **The rolling 12-month average was 10.09 million units per month and \$1.07/unit**
 - The recent 6-months (Oct'09–Mar'10) showed an average of 10.24 million units each month, +3% gain over the prior 6-months average of 9.94 million units
 - Jan'10 was the peak of the 12 months observed with over 13 million units sold, and this may be because of the New Year's celebration, people preparing for the Super Bowl, and ASP being the lowest during this month
- **ASP was lowest on Jan'10 at \$0.89/unit**
 - The recent 6-months (Oct'09–Mar'10) showed an ASP of \$0.98/unit, -15% lower than the prior 6-months which had an ASP of \$1.16/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**

