



Avocado Regional Composite Plains 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





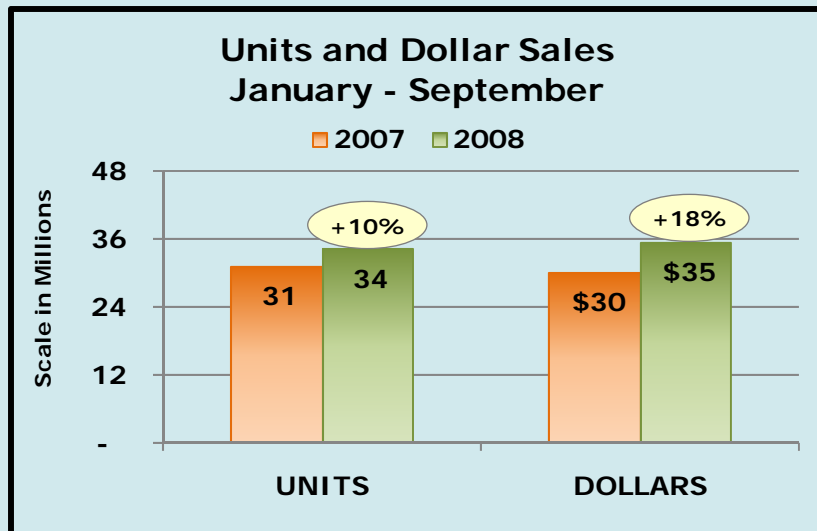
Plains: Region Highlights

- **Overview based on the following IRI markets:**
 - St. Louis, MO; Omaha, NE; Des Moines, IA; Minneapolis/St. Paul, MN; Kansas City, KS/MO; Wichita, KS
- **Plains Overview**
 - Category units experienced consecutive double-digit growth of +10% in 2008 and +20% in 2009
 - Category dollars also experienced consecutive double-digit growth of +18% in 2008 and +14% in 2009
 - Category average selling price (ASP) increased +8% to \$1.04/unit in 2008, but declined -4% to \$0.99/unit in 2009
- **Plains versus Total US trends**
 - Plains' category unit trend of +20% was slightly higher than the national average of +19%
 - Plains' #1 selling PLU 4225 exhibited a unit trend of +9% which was -16 points below the national average
 - Plains' category dollar trend of +14% was also slightly higher than the national average of +13%
 - Plains' PLU 4046 dollar trend outpaced the national average by +95 points
 - Plains' 2009 category ASP of \$0.99/unit was -5% lower than the nation's \$1.04/unit average

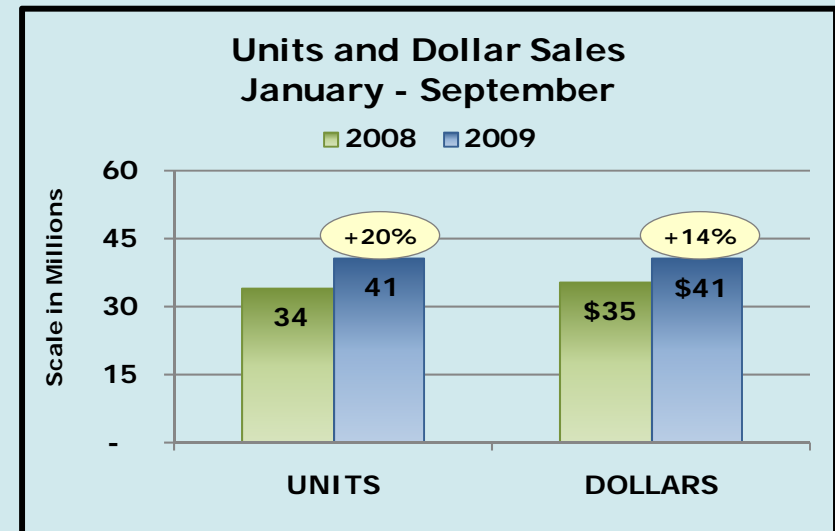




Plains: Region Retail Sales Overview



Jan-Sep	2007	2008	07v08
Category ASP/Unit	\$ 0.96	\$ 1.04	8%



Jan-Sep	2008	2009	08v09
Category ASP/Unit	\$ 1.04	\$ 0.99	-4%

- Category units experienced consecutive double-digit growth of +10% in 2008 and +20% in 2009
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- Category average selling price (ASP) increased +8% to \$1.04/unit in 2008, but declined -4% to \$0.99/unit in 2009





Plains vs. Total U.S.: PLU Comparisons January – September: 2008 vs. 2009

JANUARY - SEPTEMBER: 2008 vs 2009

UNITS		Plains			Total US		
PLU	Description	2008	2009	Variance	2008	2009	Variance
4046	Small Hass #60 sizes & smaller	4,956	10,517	112.2%	224,505	258,720	15.2%
4225	Large Hass #40 & #48 sizes	21,186	23,066	8.9%	344,268	428,888	24.6%
4770	X-Large Hass #36 sizes & larger	468	534	14.1%	26,703	29,703	11.2%
Other	Greenskins, Pinkertons, non-Hass PLUs	1,389	876	-36.9%	18,212	19,622	7.7%
Organic	All Organic PLUs	365	371	1.6%	8,368	9,254	10.6%
Bags	All bagged PLUs	5,797	5,494	-5.2%	89,884	102,011	13.5%
TOTAL CATEGORY UNITS (add '000s)		34,160	40,858	19.6%	711,940	848,198	19.1%
DOLLARS		Plains			Total US		
PLU	Description	2008	2009	Variance	2008	2009	Variance
4046	Small Hass #60 sizes & smaller	\$ 5,950	\$ 11,881	99.7%	\$ 204,528	\$ 214,584	4.9%
4225	Large Hass #40 & #48 sizes	\$ 23,582	\$ 23,823	1.0%	\$ 450,663	\$ 537,451	19.3%
4770	X-Large Hass #36 sizes & larger	\$ 1,191	\$ 1,301	9.2%	\$ 47,304	\$ 49,751	5.2%
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 2,919	\$ 1,639	-43.8%	\$ 29,475	\$ 31,396	6.5%
Organic	All Organic PLUs	\$ 567	\$ 562	-0.9%	\$ 14,311	\$ 15,602	9.0%
Bags	All bagged PLUs	\$ 1,224	\$ 1,295	5.8%	\$ 36,226	\$ 35,733	-1.4%
TOTAL CATEGORY DOLLARS (add '000s)		\$ 35,433	\$ 40,502	14.3%	\$ 782,507	\$ 884,519	13.0%
AVERAGE SELLING PRICE (ASP) / UNIT		Plains			Total US		
PLU	Description	2008	2009	Variance	2008	2009	Variance
4046	Small Hass #60 sizes & smaller	\$ 1.20	\$ 1.13	-5.9%	\$ 0.91	\$ 0.83	-9.0%
4225	Large Hass #40 & #48 sizes	\$ 1.11	\$ 1.03	-7.2%	\$ 1.31	\$ 1.25	-4.3%
4770	X-Large Hass #36 sizes & larger	\$ 2.54	\$ 2.44	-4.3%	\$ 1.77	\$ 1.67	-5.5%
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 2.10	\$ 1.87	-11.0%	\$ 1.62	\$ 1.60	-1.1%
Organic	All Organic PLUs	\$ 1.55	\$ 1.52	-2.4%	\$ 1.71	\$ 1.69	-1.4%
Bags	All bagged PLUs	\$ 0.21	\$ 0.24	11.6%	\$ 0.40	\$ 0.35	-13.1%
CATEGORY ASP		\$ 1.04	\$ 0.99	-4.4%	\$ 1.10	\$ 1.04	-5.1%

- Plains' category unit trend of +20% was slightly higher than the national average of +19%
 - Plains' unit trend of +20% was driven by the #2 selling PLU 4046, which grew +5.56 million units
 - Plains' #1 selling PLU 4225 exhibited a unit trend of +9% which was -16 points below the national average
- Plains' category dollar trend of +14% was also slightly higher than the national average of +13%
 - Plains' unit trend of +16% was primarily driven by PLU 4046 which grew +\$5.93 million
 - Plains' PLU 4046 dollar trend outpaced the national average by +95 points
- Plains' 2009 category ASP of \$0.99/unit was -5% lower than the nation's \$1.04/unit average
 - All segments showed an ASP decline in 2009 except for Bagged Avocados which increased +12%

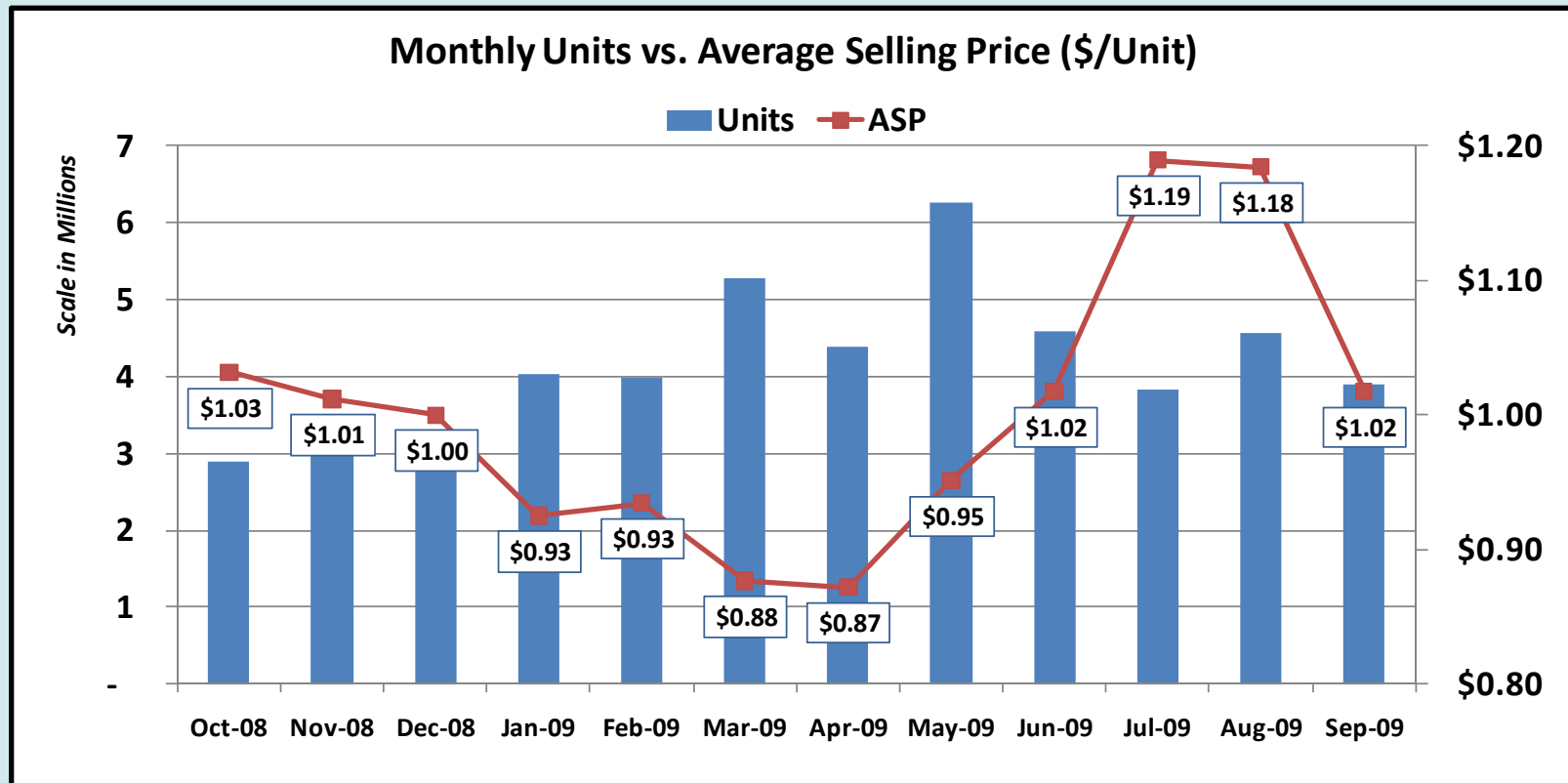




Plains

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

- The rolling 12-month average was 4.17 million units per month and \$1.00/unit
 - The 6-months ending in September showed an average of 4.59 million units each month, +23% gain over the prior 6-month average of 3.74 million units
- Average selling price was lowest in Mar-09 and Apr-09 when it was below \$0.90/unit
 - The 6-months ending in September showed an ASP of \$1.03/unit, +8% higher than the prior 6-months which had an ASP of \$0.95/unit





Plains: Region Highlights

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- **Plains Overview**

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- **Plains versus Total US trends**

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- Plains' category dollar trend of +14% was also slightly higher than the national average of +13%
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- Plains' 2009 category ASP of \$0.99/unit was -5% lower than the nation's \$1.04/unit average





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**
- **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-Dec) unless otherwise noted**

