



# Avocado Regional Composite

## South Central 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***





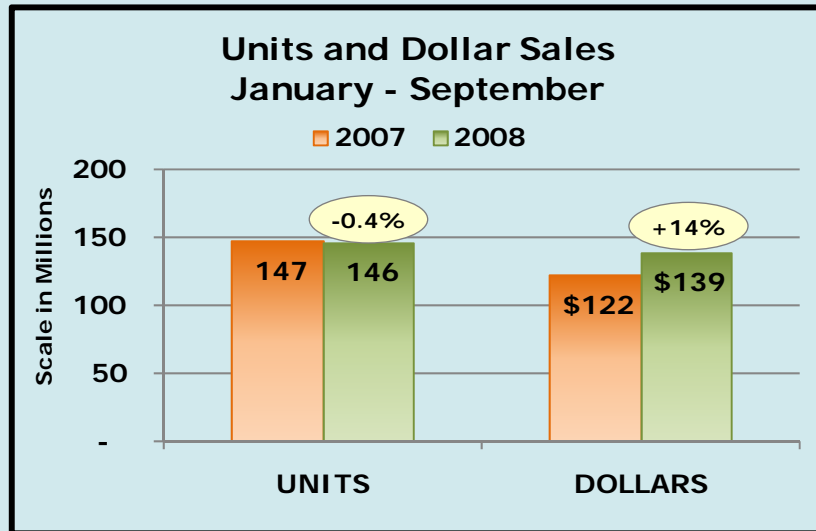
## South Central: Region Highlights

- **Overview based on the following IRI markets:**
  - Dallas, TX; Houston, TX; Little Rock, AR; New Orleans, LA
- **South Central Overview**
  - Category units experienced a slight decline of -0.4% in 2008, but rebounded in 2009 growing +18%
  - Category dollars experienced consecutive double-digit growth of +14% in 2008 and in 2009
  - Category average selling price (ASP) increased +14% to \$0.95/unit in 2008, and declined slightly in 2009 to \$0.92/unit
- **South Central versus Total US trends**
  - South Central's category unit trend of +18% was slightly below the national average of +19%
    - PLU 4046 and PLU 4225 exhibited unit trends that were above the national averages
  - South Central's category dollar trend of +14% was +1 point above the national average
    - PLU 4225 showed a dollar trend of +29% which was +10 points better than the national average of +19%
  - South Central's 2009 category ASP of \$0.92/unit was -12% lower than the nation's \$1.04/unit average

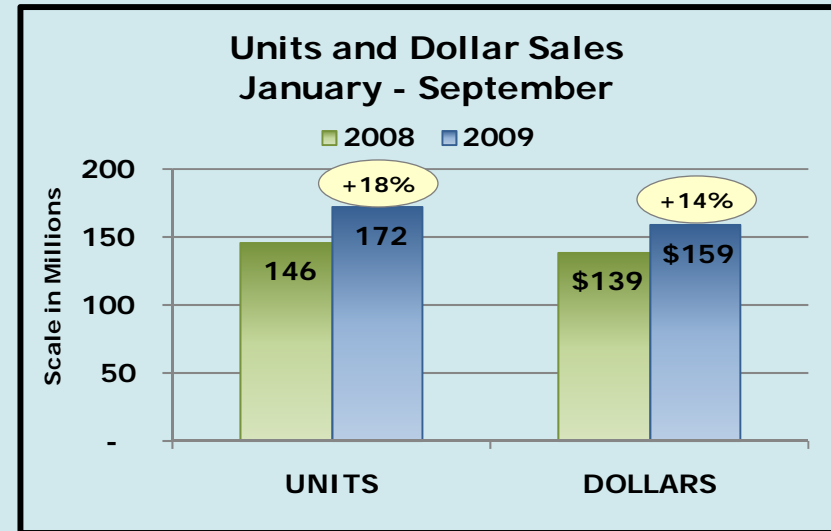




## South Central: Region Retail Sales Overview



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



Jan-Sep	2008	2009	08v09
Category ASP/Unit	\$ 0.95	\$ 0.92	-3%

- Category units experienced a slight decline of -0.4% in 2008, but rebounded in 2009 growing +18%
- Category dollars experienced consecutive double-digit growth of +14% in 2008 and in 2009
- Category average selling price (ASP) increased +14% to \$0.95/unit in 2008, and declined slightly in 2009 to \$0.92/unit





# South Central vs. Total US: PLU Comparisons January – September: 2008 vs. 2009

JANUARY - SEPTEMBER: 2008 vs 2009

UNITS		South Central			Total US		
PLU	Description	2008	2009	Variance	2008	2009	Variance
4046	Small Hass #60 sizes & smaller	90,059	105,044	16.6%	224,505	258,720	15.2%
4225	Large Hass #40 & #48 sizes	36,796	46,241	25.7%	344,268	428,888	24.6%
4770	X-Large Hass #36 sizes & larger	10,715	12,666	18.2%	26,703	29,703	11.2%
Other	Greenskins, Pinkertons, non-Hass PLUs	1,571	1,648	4.9%	18,212	19,622	7.7%
Organic	All Organic PLUs	885	872	-1.5%	8,368	9,254	10.6%
Bags	All bagged PLUs	6,418	5,907	-8.0%	89,884	102,011	13.5%
<b>TOTAL CATEGORY UNITS (add '000s)</b>		<b>146,444</b>	<b>172,378</b>	<b>17.7%</b>	<b>711,940</b>	<b>848,198</b>	<b>19.1%</b>
DOLLARS		South Central			Total US		
PLU	Description	2008	2009	Variance	2008	2009	Variance
4046	Small Hass #60 sizes & smaller	\$ 56,729	\$ 61,106	7.7%	\$ 204,528	\$ 214,584	4.9%
4225	Large Hass #40 & #48 sizes	\$ 55,725	\$ 71,766	28.8%	\$ 450,663	\$ 537,451	19.3%
4770	X-Large Hass #36 sizes & larger	\$ 20,488	\$ 20,216	-1.3%	\$ 47,304	\$ 49,751	5.2%
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 2,239	\$ 2,434	8.7%	\$ 29,475	\$ 31,396	6.5%
Organic	All Organic PLUs	\$ 1,363	\$ 1,400	2.7%	\$ 14,311	\$ 15,602	9.0%
Bags	All bagged PLUs	\$ 2,579	\$ 1,982	-23.2%	\$ 36,226	\$ 35,733	-1.4%
<b>TOTAL CATEGORY DOLLARS (add '000s)</b>		<b>\$ 139,124</b>	<b>\$ 158,904</b>	<b>14.2%</b>	<b>\$ 782,507</b>	<b>\$ 884,519</b>	<b>13.0%</b>
AVERAGE SELLING PRICE (ASP) / UNIT		South Central			Total US		
PLU	Description	2008	2009	Variance	2008	2009	Variance
4046	Small Hass #60 sizes & smaller	\$ 0.63	\$ 0.58	-7.7%	\$ 0.91	\$ 0.83	-9.0%
4225	Large Hass #40 & #48 sizes	\$ 1.51	\$ 1.55	2.5%	\$ 1.31	\$ 1.25	-4.3%
4770	X-Large Hass #36 sizes & larger	\$ 1.91	\$ 1.60	-16.5%	\$ 1.77	\$ 1.67	-5.5%
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 1.43	\$ 1.48	3.6%	\$ 1.62	\$ 1.60	-1.1%
Organic	All Organic PLUs	\$ 1.54	\$ 1.61	4.3%	\$ 1.71	\$ 1.69	-1.4%
Bags	All bagged PLUs	\$ 0.40	\$ 0.34	-16.5%	\$ 0.40	\$ 0.35	-13.1%
<b>CATEGORY ASP</b>		<b>\$ 0.95</b>	<b>\$ 0.92</b>	<b>-3.0%</b>	<b>\$ 1.10</b>	<b>\$ 1.04</b>	<b>-5.1%</b>

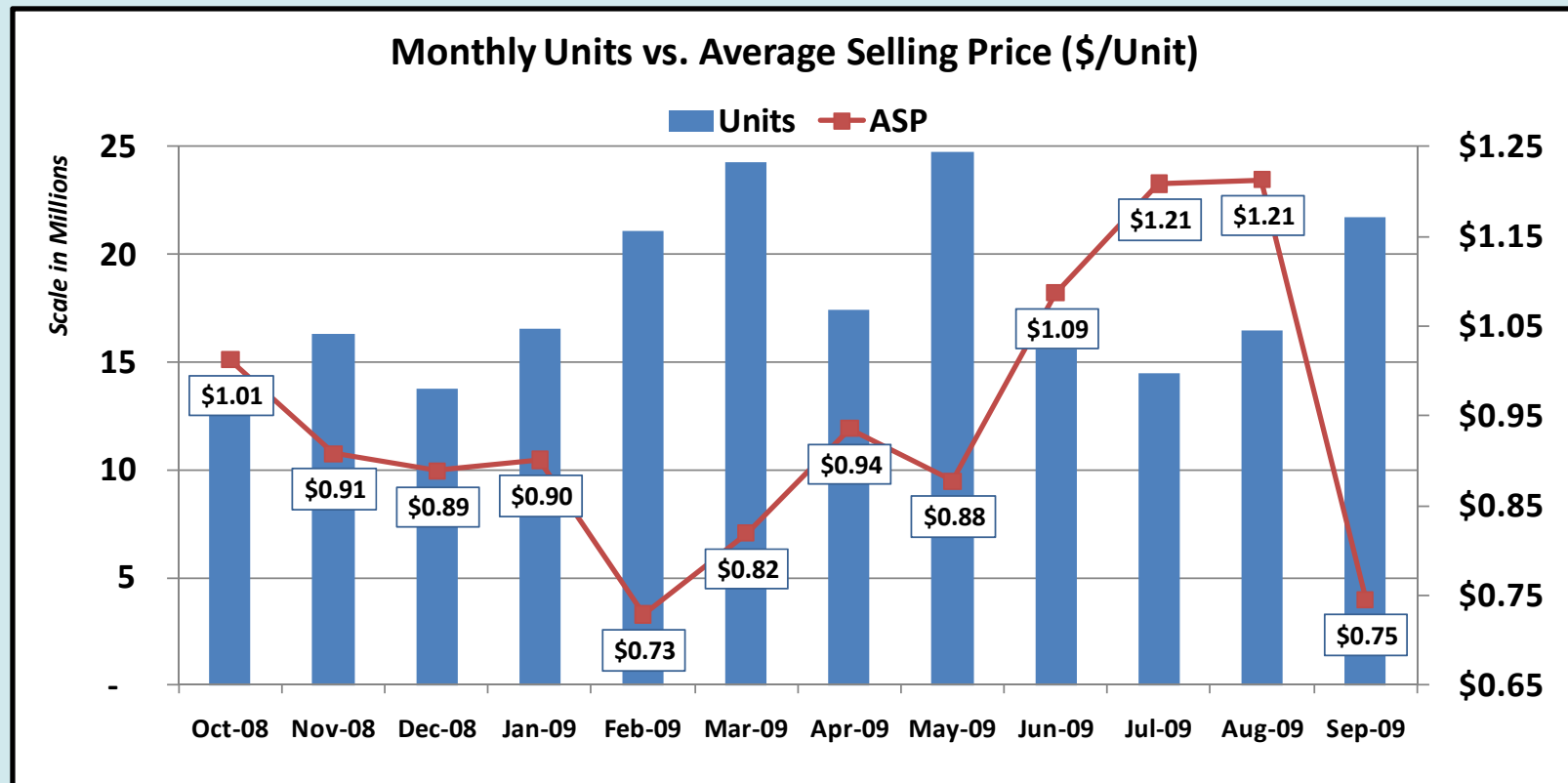
- South Central's category unit trend of +18% was slightly below the national average of +19%
  - PLU 4046 and PLU 4225 were the main growth drivers with their collective gain of +24.43 millions units
    - Both exhibited unit trends that were above the national averages
- South Central's category dollar trend of +14% was +1 point above the national average
  - Their +14% trend was primarily driven by PLU 4225 which increased +\$16.04 million, and showed a dollar trend of +29% which was +10 points better than the national average of +19%
- South Central's 2009 category ASP of \$0.92/unit was -12% lower than the nation's \$1.04/unit average





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

- The rolling 12-month average was 18.03 million units per month and \$0.92/unit
  - The 6-months ending in September showed an average of 18.42 million units each month, +4% gain over the prior 6-month average of 17.65 million units
- Average selling price was below \$0.80/unit in Feb-09 and Sep-09
  - The 6-months ending in September showed an ASP of \$0.98/unit, +14% higher than the prior 6-months which had an ASP of \$0.86/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 US totals and averages utilized in comparisons includes all U.S. regions**
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