



Avocado Regional Composite

Great Lakes Region

January – September: 2010 vs. 2011



Methodology

- **Sales and Market Data is obtained using CAST**
- **(Category Avocado Sales Trend)**
 - Symphony Information Resources Inc. Group (SymphonyIRI Group) 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-Sep) unless otherwise noted**
- **Market compositions are provided by SymphonyIRI Group**
- **Total U.S. totals and averages utilized in comparisons includes all U.S. regions**
- **Retail data provided by SymphonyIRI Group / FreshLook Marketing**
- **Important Note: Due to the fact that SymphonyIRI Group / FreshLook Marketing 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 markets:**

- Chicago, IL; Cincinnati, OH; Cleveland, OH; Columbus, OH; Detroit, MI

- **Great Lakes Overview**

- Category units grew +40% in 2010, but declined -12% in 2011
- Category dollars experienced consecutive growth of +21% in 2010, and +1% in 2011
- Category average selling price (ASP) declined -14% to \$1.02/unit in 2010, but increased +15% to \$1.18/unit in 2011
- The rolling 12-month average was 8.4 million units per month and ASP of \$1.14/unit
 - ASP was the lowest during Oct'10 at \$0.89/unit, which coincides with when volume peaked at 10.7 million units sold

- **Great Lakes versus Total U.S. trends**

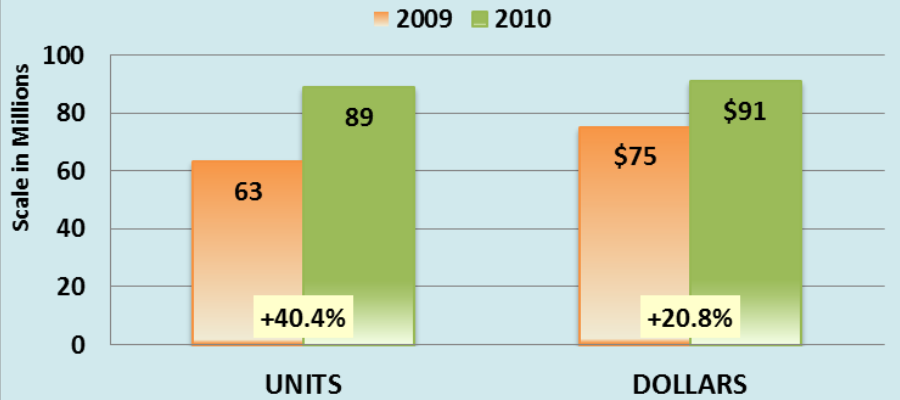
- Great Lakes' unit trend of -12% was +5 points higher than the national average
 - The Great Lakes' PLU 4225 unit trend of -22% outperformed the national average by +7 points
- Great Lakes' dollar trend of +1% underperformed the national average by -7 points
- Great Lakes' 2011 category ASP of \$1.18/unit was -3% lower than the national average





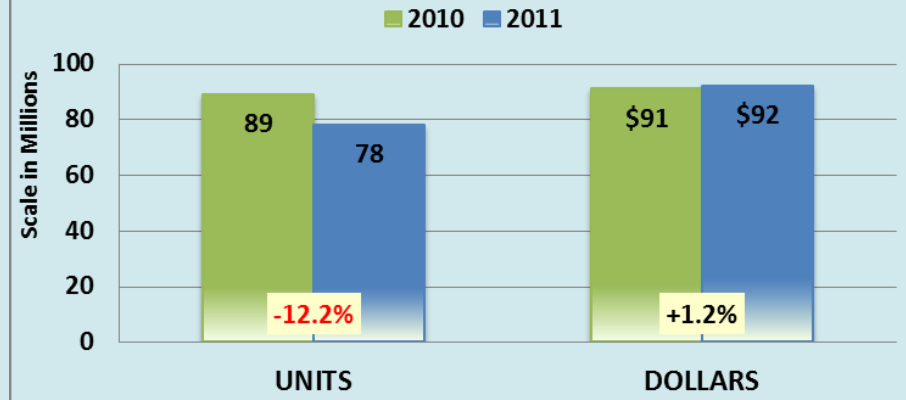
Great Lakes: Region Retail Sales Overview

Units and Dollar Sales January - September



Jan-Sep	2009	2010	09v10
Category ASP/Unit	\$ 1.19	\$ 1.02	-13.9%

Units and Dollar Sales January - September



Jan-Sep	2010	2011	10v11
Category ASP/Unit	\$ 1.02	\$ 1.18	+15.3%

- Category units grew +40% in 2010, but declined -12% 2011
- Category dollars experienced consecutive growth of +21% in 2010, and +1% in 2011
- Category average selling price (ASP) declined -14% to \$1.02/unit in 2010, but increased +15% to \$1.18/unit in 2011





Great Lakes vs. Total U.S.: PLU Comparisons January – September: 2010 vs. 2011

JANUARY - SEPTEMBER: 2010 vs 2011

UNITS		Great Lakes			Total U.S.		
PLU	Description	2010	2011	Variance	2010	2011	Variance
4046	Small Hass #60 sizes & smaller	8,798	8,055	-8.4%	386,205	314,231	-18.6%
4225	Large Hass #40 & #48 sizes	53,307	41,668	-21.8%	488,726	347,908	-28.8%
4770	X-Large Hass #36 sizes & larger	6,295	3,639	-42.2%	41,629	40,363	-3.0%
Other	Greenskins, Pinkertons, non-Hass PLUs	503	883	+75.6%	20,734	25,000	+20.6%
Organic	All Organic PLUs	915	945	+3.3%	11,343	9,715	-14.3%
Bags	All bagged PLUs	19,079	22,822	+19.6%	136,711	167,884	+22.8%
TOTAL CATEGORY UNITS (add '000s)		88,898	78,013	-12.2%	1,085,348	905,102	-16.6%
DOLLARS		Great Lakes			Total U.S.		
PLU	Description	2010	2011	Variance	2010	2011	Variance
4046	Small Hass #60 sizes & smaller	\$ 8,545	\$ 9,943	+16.4%	\$ 284,396	\$ 346,791	+21.9%
4225	Large Hass #40 & #48 sizes	\$ 66,143	\$ 65,452	-1.0%	\$ 577,197	\$ 557,668	-3.4%
4770	X-Large Hass #36 sizes & larger	\$ 9,034	\$ 6,439	-28.7%	\$ 66,133	\$ 77,589	+17.3%
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 893	\$ 1,565	+75.4%	\$ 34,896	\$ 43,138	+23.6%
Organic	All Organic PLUs	\$ 1,456	\$ 1,754	+20.5%	\$ 17,996	\$ 20,225	+12.4%
Bags	All bagged PLUs	\$ 4,909	\$ 6,933	+41.2%	\$ 36,148	\$ 53,846	+49.0%
TOTAL CATEGORY DOLLARS (add '000s)		\$ 90,979	\$ 92,087	+1.2%	\$ 1,016,767	\$ 1,099,258	+8.1%
AVERAGE SELLING PRICE (ASP) / UNIT		Great Lakes			Total U.S.		
PLU	Description	2010	2011	Variance	2010	2011	Variance
4046	Small Hass #60 sizes & smaller	\$ 0.97	\$ 1.23	+27.1%	\$ 0.74	\$ 1.10	+49.9%
4225	Large Hass #40 & #48 sizes	\$ 1.24	\$ 1.57	+26.6%	\$ 1.18	\$ 1.60	+35.7%
4770	X-Large Hass #36 sizes & larger	\$ 1.43	\$ 1.77	+23.3%	\$ 1.59	\$ 1.92	+21.0%
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 1.78	\$ 1.77	-0.2%	\$ 1.68	\$ 1.73	+2.5%
Organic	All Organic PLUs	\$ 1.59	\$ 1.86	+16.7%	\$ 1.59	\$ 2.08	+31.2%
Bags	All bagged PLUs	\$ 0.26	\$ 0.30	+18.1%	\$ 0.26	\$ 0.32	+21.3%
CATEGORY ASP		\$ 1.02	\$ 1.18	+15.3%	\$ 0.94	\$ 1.21	+29.6%

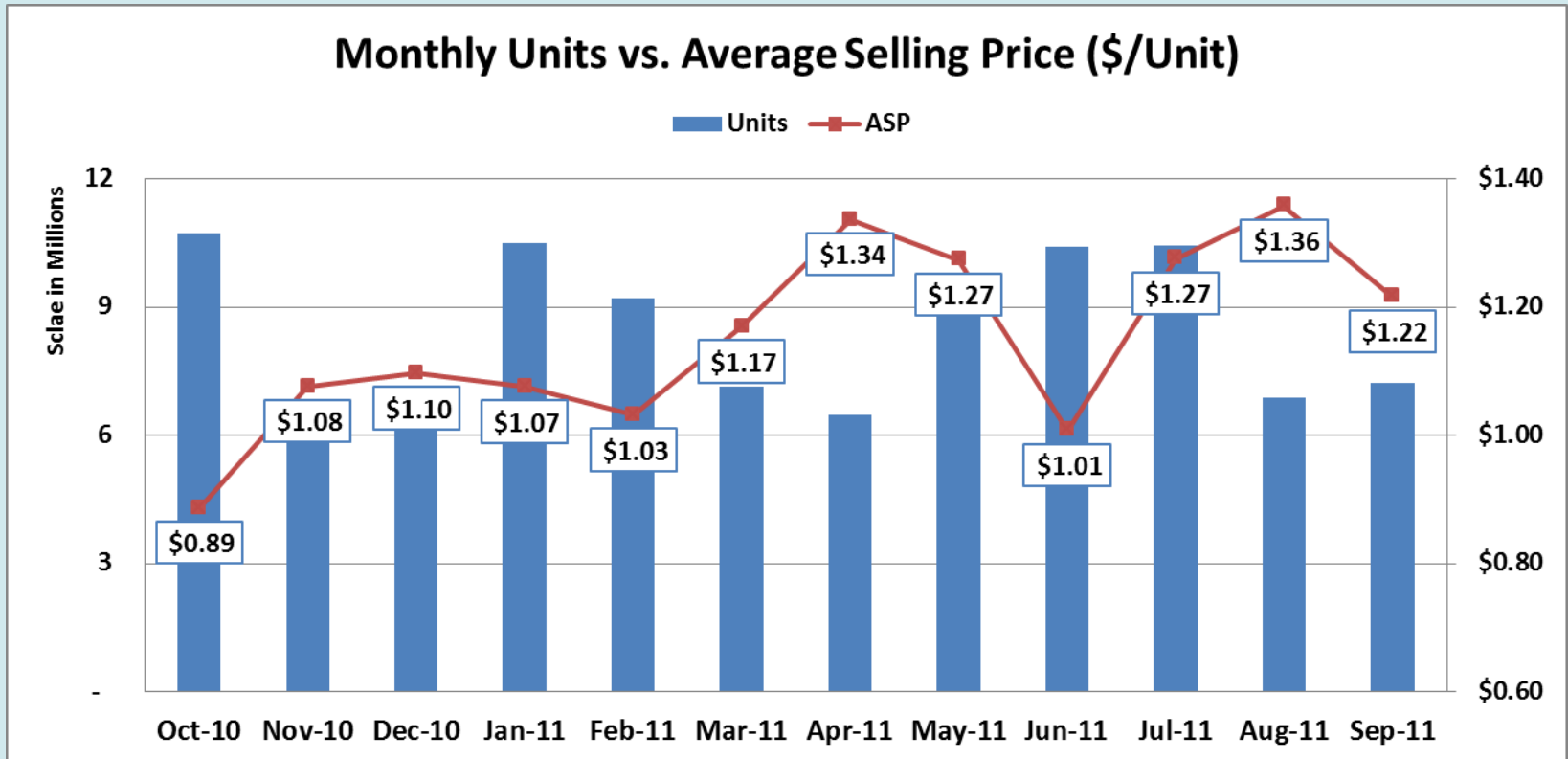
- **Great Lakes' unit trend of -12% outperformed the national average by +5 points**
 - The Great Lakes' PLU 4225 (their #1 selling segment) unit trend of -22% outperformed the national average by +7 points
- **Great Lakes' dollar trend of +1% underperformed the national average by -7 points**
- **Great Lakes' 2011 category ASP of \$1.18/unit was -3% lower than the national average of \$1.21/unit**





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

- **The rolling 12-month average was 8.4 million units per month at \$1.14/unit**
 - The recent 6-months (Apr'11-Sep'11) showed an average of 8.5 million units each month, +3% above the prior 6-months average of 8.3 million units
 - Oct'10 was the peak of the 12 months observed with 10.7 million units sold
- **ASP was lowest during Oct'10 at \$0.89/unit**
 - The recent 6-months (Apr'11-Sep'11) showed an ASP of \$1.23/unit, +18% higher than the prior 6-months which had an ASP of \$1.04/unit





Great Lakes: Region Highlights

- **Overview based on the following markets:**

- Chicago, IL; Cincinnati, OH; Cleveland, OH; Columbus, OH; Detroit, MI

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- **Great Lakes versus Total U.S. trends**

- Great Lakes' unit trend of -12% was +5 points higher than the national average
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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 Symphony Information Research, Inc. Group (SymphonyIRI Group) / 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-Sep) unless otherwise noted**

