



# **Avocado Regional Composite**

## **Northeast 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**





## Northeast: Region Highlights

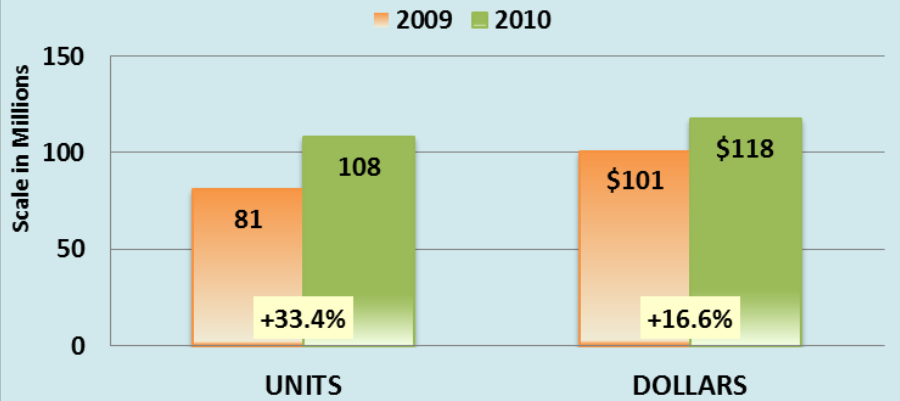
- **Overview based on the following markets:**
  - Albany, NY; Boston, MA; Buffalo, NY; New England; New York; Philadelphia, PA; Pittsburgh, PA
- **Northeast Overview**
  - Category units grew +33% in 2010, but declined -8% in 2011
  - Category dollars exhibited consecutive double-digit growth of +17% in 2010, and +11% in 2011
  - Category average selling price (ASP) declined of -13% to \$1.09/unit in 2010, but increased +21% to \$1.32/unit in 2011
  - The rolling 12-month average was 10.6 million units per month and ASP of \$1.28/unit
    - Volume peaked in Jul'11 with 14.1 million units sold
    - ASP was the lowest during Jan'11 at \$1.07/unit
- **Northeast versus Total U.S. trends**
  - Northeast's category unit trend of -8% was +9 points above the national average of -17%
    - Northeast's PLU 4225, their #1 selling segment, unit trend of -22% outperformed the national average by +7 points
  - Northeast's category dollar trend of +11% outperformed the national average by +3 points
    - Northeast's PLU 4225 dollar trend of +6% outperformed the national average by +9 points
  - Northeast's 2011 category ASP of \$1.32/unit was +9% higher than the national average of \$1.21/unit





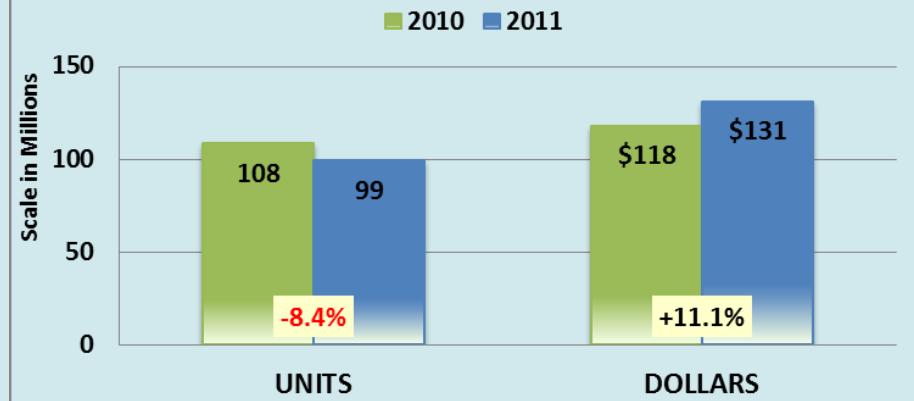
# Northeast: Region Retail Sales Overview

### Units and Dollar Sales January - September



Jan-Sep	2009	2010	09v10
Category ASP/Unit	\$ 1.24	\$ 1.09	-12.6%

### Units and Dollar Sales January - September



Jan-Sep	2010	2011	10v11
Category ASP/Unit	\$ 1.09	\$ 1.32	+21.2%

- Category units grew +33% in 2010, but declined -8% in 2011
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# Northeast vs. Total U.S.: PLU Comparisons January – September: 2010 vs. 2011

JANUARY - SEPTEMBER: 2010 vs 2011

UNITS		Northeast			Total U.S.		
PLU	Description	2010	2011	Variance	2010	2011	Variance
4046	Small Hass #60 sizes & smaller	7,283	7,513	+3.2%	386,205	314,231	-18.6%
4225	Large Hass #40 & #48 sizes	66,297	52,014	-21.5%	488,726	347,908	-28.8%
4770	X-Large Hass #36 sizes & larger	814	180	-77.9%	41,629	40,363	-3.0%
Other	Greenskins, Pinkertons, non-Hass PLUs	6,363	7,424	+16.7%	20,734	25,000	+20.6%
Organic	All Organic PLUs	1,077	1,194	+10.9%	11,343	9,715	-14.3%
Bags	All bagged PLUs	26,293	30,767	+17.0%	136,711	167,884	+22.8%
<b>TOTAL CATEGORY UNITS (add '000s)</b>		<b>108,126</b>	<b>99,091</b>	<b>-8.4%</b>	<b>1,085,348</b>	<b>905,102</b>	<b>-16.6%</b>
DOLLARS		Northeast			Total U.S.		
PLU	Description	2010	2011	Variance	2010	2011	Variance
4046	Small Hass #60 sizes & smaller	\$ 8,544	\$ 11,290	+32.1%	\$ 284,396	\$ 346,791	+21.9%
4225	Large Hass #40 & #48 sizes	\$ 87,222	\$ 92,524	+6.1%	\$ 577,197	\$ 557,668	-3.4%
4770	X-Large Hass #36 sizes & larger	\$ 1,578	\$ 366	-76.8%	\$ 66,133	\$ 77,589	+17.3%
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 10,087	\$ 12,462	+23.5%	\$ 34,896	\$ 43,138	+23.6%
Organic	All Organic PLUs	\$ 2,172	\$ 2,875	+32.3%	\$ 17,996	\$ 20,225	+12.4%
Bags	All bagged PLUs	\$ 7,990	\$ 11,128	+39.3%	\$ 36,148	\$ 53,846	+49.0%
<b>TOTAL CATEGORY DOLLARS (add '000s)</b>		<b>\$ 117,594</b>	<b>\$ 130,645</b>	<b>+11.1%</b>	<b>\$ 1,016,767</b>	<b>\$ 1,099,258</b>	<b>+8.1%</b>
AVERAGE SELLING PRICE (ASP) / UNIT		Northeast			Total U.S.		
PLU	Description	2010	2011	Variance	2010	2011	Variance
4046	Small Hass #60 sizes & smaller	\$ 1.17	\$ 1.50	+28.1%	\$ 0.74	\$ 1.10	+49.9%
4225	Large Hass #40 & #48 sizes	\$ 1.32	\$ 1.78	+35.2%	\$ 1.18	\$ 1.60	+35.7%
4770	X-Large Hass #36 sizes & larger	\$ 1.94	\$ 2.04	+5.2%	\$ 1.59	\$ 1.92	+21.0%
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 1.59	\$ 1.68	+5.9%	\$ 1.68	\$ 1.73	+2.5%
Organic	All Organic PLUs	\$ 2.02	\$ 2.41	+19.3%	\$ 1.59	\$ 2.08	+31.2%
Bags	All bagged PLUs	\$ 0.30	\$ 0.36	+19.0%	\$ 0.26	\$ 0.32	+21.3%
<b>CATEGORY ASP</b>		<b>\$ 1.09</b>	<b>\$ 1.32</b>	<b>+21.2%</b>	<b>\$ 0.94</b>	<b>\$ 1.21</b>	<b>+29.6%</b>

- Northeast's category unit trend of -8% was +9 points above the national average**
  - Northeast's PLU 4225, their #1 selling segment, unit trend of -22% outperformed the national average by +7 points
- Northeast's category dollar trend of +11% was +3 points above the national average**
  - Northeast's PLU 4225, their #1 selling segment, dollar trend of +6% outperformed the national average by +9 points
- Northeast's 2011 category ASP of \$1.32/unit was +9% higher than the national average of \$1.21/unit**

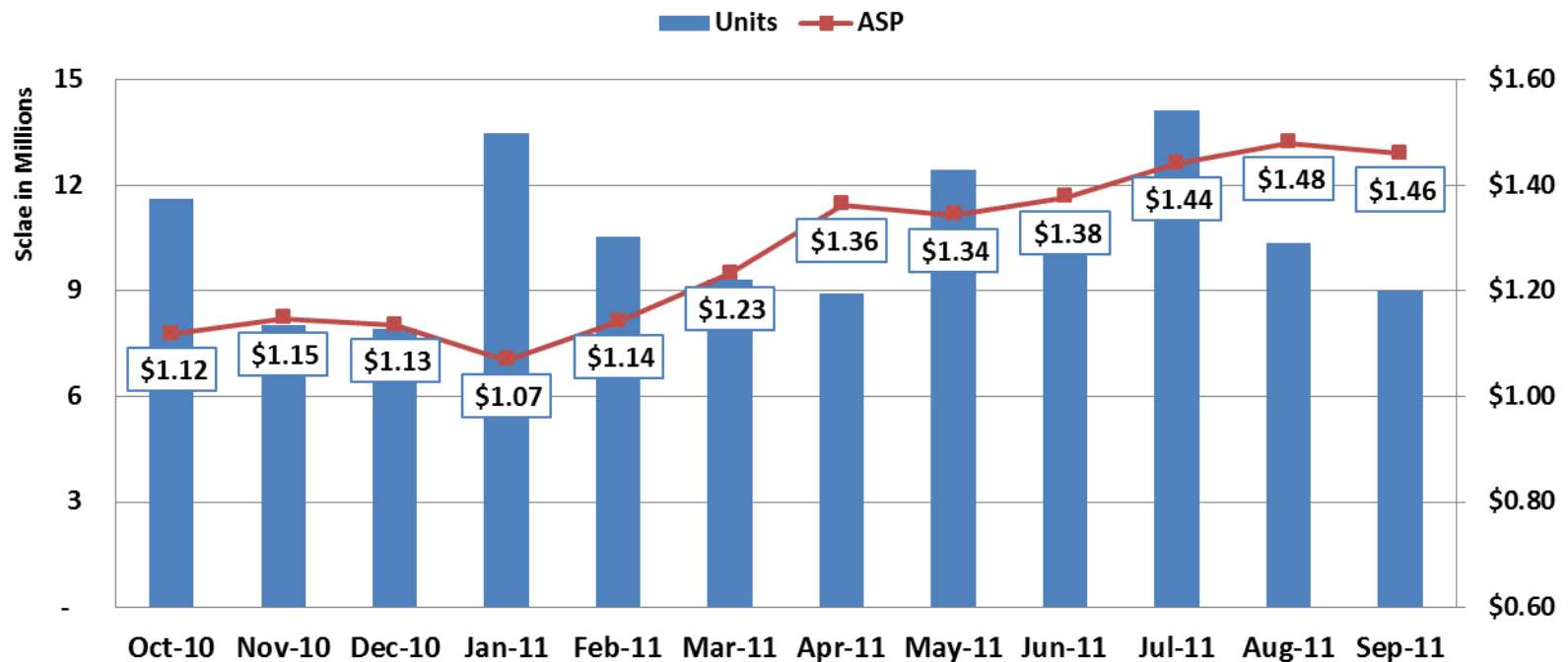




# Northeast Total Category by Month: Units to ASP (rolling 12-months)

- **The rolling 12-month average was 10.6 million units per month at \$1.28/unit**
  - The recent 6-months (Apr'11-Sep'11) showed an average of 11.0 million units each month, which was +8% higher than the prior 6-months average
  - Jul'11 was the peak of the 12 months observed with 14.1 million units sold
- **ASP was lowest during Jan'11 at \$1.07/unit**
  - The recent 6-months (Apr'11-Sep'11) showed an ASP of \$1.41/unit, +24% higher than the prior 6-months which had an ASP of \$1.13/unit

## Monthly Units vs. Average Selling Price (\$/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 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**

