



Avocado Regional Composite

Plains Region

January – September: 2010 vs. 2011



Methodology

- **Sales and Market Data is obtained using CAST**
- **(Category Avocado Sales Trend)**
 - Symphony Information Resources Inc. 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 by SymphonyIRI Group / FreshLook Marketing 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 markets:**

- St. Louis, MO; Omaha, NE; Des Moines, IA; Minneapolis/St. Paul, MN; Kansas City, KS/MO; Wichita, KS

- **Plains Overview**

- Category units grew +31% in 2010, but declined -16% in 2011
- Category dollars experienced consecutive growth of +23% in 2010, and +6% in 2011
- Category average selling price (ASP) declined -6% to \$1.08/unit in 2010, but increased +27% to \$1.38/unit in 2011
- The rolling 12-month average was 4.4 million units per month and ASP of \$1.29/unit
 - Volume peaked in Jan'11 with 6.2 million units sold
 - ASP was the lowest during Oct'10 at \$1.00/unit

- **Plains versus Total U.S. trends**

- Plains' category unit trend of -16% slightly outperformed the national average
 - Plains' PLU 4046, their #2 selling segment, unit trend of +16% was +35 points higher than the national average
- Plains' category dollar trend of +6% was -2 points below the national average of +8%
- Plains' 2011 category ASP of \$1.38/unit was +13% higher than the national average of \$1.21/unit

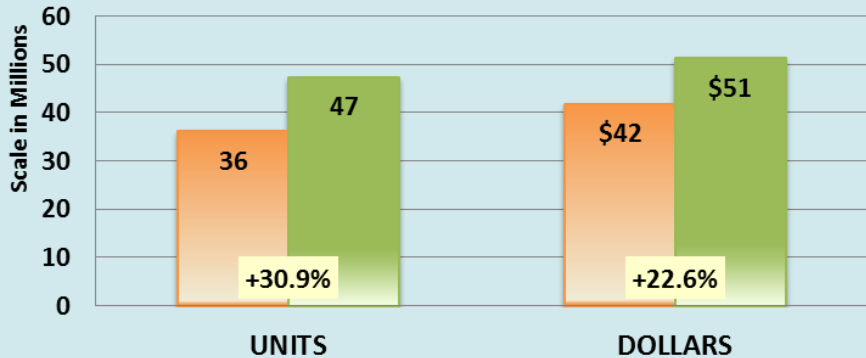




Plains: Region Retail Sales Overview

Units and Dollar Sales January - September

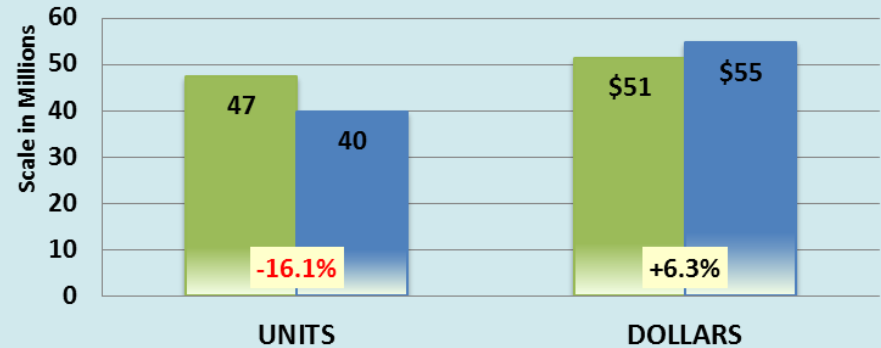
2009 2010



Jan-Sep	2009	2010	09v10
Category ASP/Unit	\$ 1.16	\$ 1.08	-6.3%

Units and Dollar Sales January - September

2010 2011



Jan-Sep	2010	2011	10v11
Category ASP/Unit	\$ 1.08	\$ 1.38	+26.8%

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

JANUARY - SEPTEMBER: 2010 vs 2011

UNITS		Plains			Total U.S.		
PLU	Description	2010	2011	Variance	2010	2011	Variance
4046	Small Hass #60 sizes & smaller	11,022	12,753	+15.7%	386,205	314,231	-18.6%
4225	Large Hass #40 & #48 sizes	29,794	20,474	-31.3%	488,726	347,908	-28.8%
4770	X-Large Hass #36 sizes & larger	551	530	-3.7%	41,629	40,363	-3.0%
Other	Greenskins, Pinkertons, non-Hass PLUs	283	281	-0.8%	20,734	25,000	+20.6%
Organic	All Organic PLUs	447	413	-7.6%	11,343	9,715	-14.3%
Bags	All bagged PLUs	5,221	5,226	+0.1%	136,711	167,884	+22.8%
TOTAL CATEGORY UNITS (add '000s)		47,318	39,678	-16.1%	1,085,348	905,102	-16.6%
DOLLARS		Plains			Total U.S.		
PLU	Description	2010	2011	Variance	2010	2011	Variance
4046	Small Hass #60 sizes & smaller	\$ 10,745	\$ 16,836	+56.7%	\$ 284,396	\$ 346,791	+21.9%
4225	Large Hass #40 & #48 sizes	\$ 36,795	\$ 33,374	-9.3%	\$ 577,197	\$ 557,668	-3.4%
4770	X-Large Hass #36 sizes & larger	\$ 1,470	\$ 1,476	+0.4%	\$ 66,133	\$ 77,589	+17.3%
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 514	\$ 524	+1.9%	\$ 34,896	\$ 43,138	+23.6%
Organic	All Organic PLUs	\$ 721	\$ 825	+14.5%	\$ 17,996	\$ 20,225	+12.4%
Bags	All bagged PLUs	\$ 1,081	\$ 1,547	+43.1%	\$ 36,148	\$ 53,846	+49.0%
TOTAL CATEGORY DOLLARS (add '000s)		\$ 51,326	\$ 54,582	+6.3%	\$ 1,016,767	\$ 1,099,258	+8.1%
AVERAGE SELLING PRICE (ASP) / UNIT		Plains			Total U.S.		
PLU	Description	2010	2011	Variance	2010	2011	Variance
4046	Small Hass #60 sizes & smaller	\$ 0.97	\$ 1.32	+35.4%	\$ 0.74	\$ 1.10	+49.9%
4225	Large Hass #40 & #48 sizes	\$ 1.24	\$ 1.63	+32.0%	\$ 1.18	\$ 1.60	+35.7%
4770	X-Large Hass #36 sizes & larger	\$ 2.67	\$ 2.78	+4.3%	\$ 1.59	\$ 1.92	+21.0%
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 1.81	\$ 1.86	+2.7%	\$ 1.68	\$ 1.73	+2.5%
Organic	All Organic PLUs	\$ 1.61	\$ 2.00	+23.9%	\$ 1.59	\$ 2.08	+31.2%
Bags	All bagged PLUs	\$ 0.21	\$ 0.30	+42.9%	\$ 0.26	\$ 0.32	+21.3%
CATEGORY ASP		\$ 1.08	\$ 1.38	+26.8%	\$ 0.94	\$ 1.21	+29.6%

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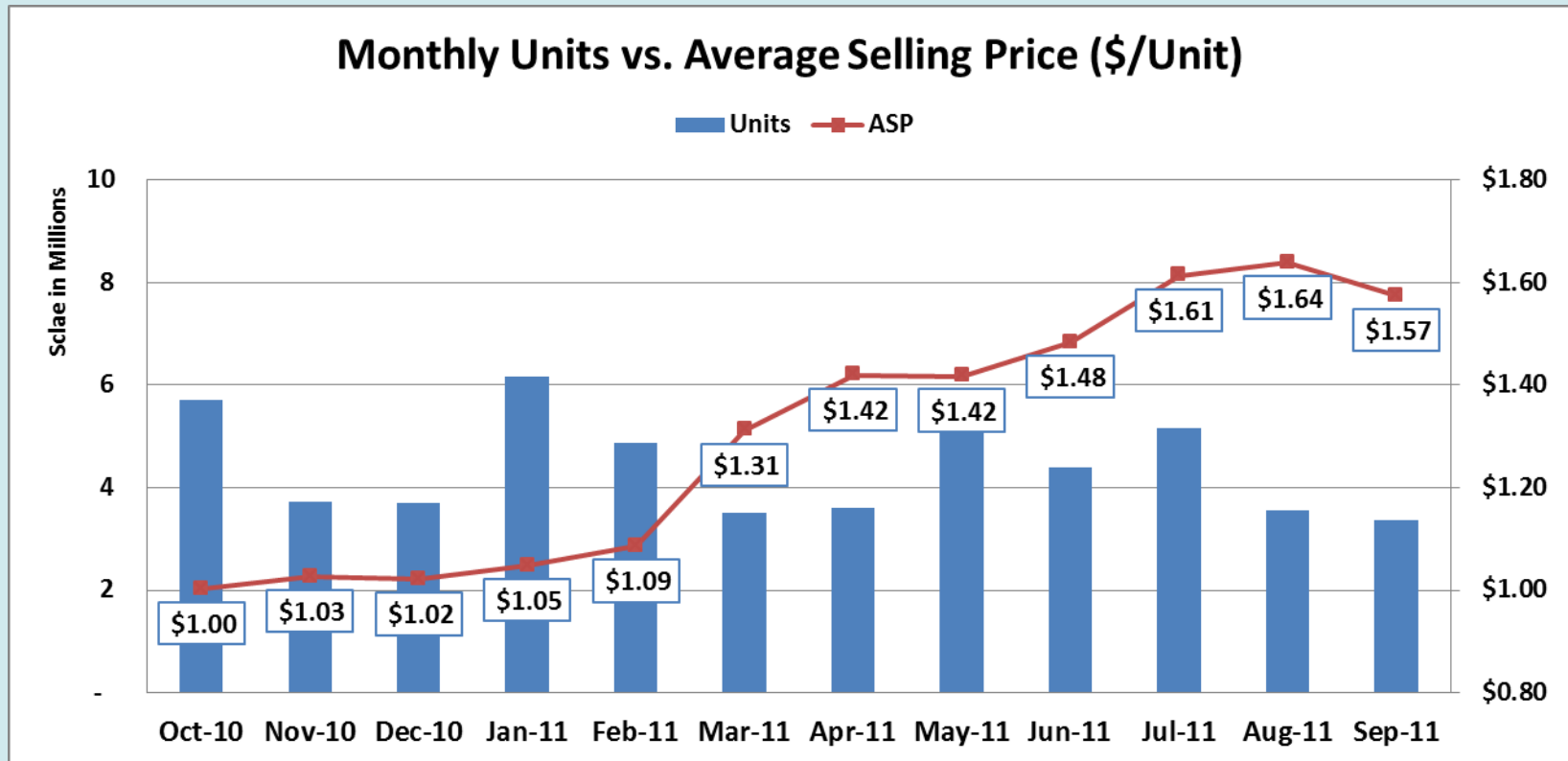




Plains

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

- **The rolling 12-month average was 4.4 million units per month at \$1.29/unit**
 - The recent 6-months (Apr'11-Sep'11) showed an average of 4.2 million units each month, -9% lower than the prior 6-months average of 4.6 million units
 - Jan'11 was the peak of the 12 months observed with 6.2 million units sold
- **Average selling price was the lowest during Oct'10 at \$1.00/unit**
 - The recent 6-months (Apr'11-Sep'11) showed an ASP of \$1.52/unit, +42% above the prior 6-months which had an ASP of \$1.07/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**

