



Avocado Regional Composite

South Central 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**





South Central: Region Highlights

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

- Dallas, TX; Houston, TX; Little Rock, AR

- **South Central Overview**

- Category units grew +23% in 2010, but declined -28% in 2011
- Category dollars experienced consecutive growth of +9% in 2010, and +7% in 2011
- Category average selling price (ASP) declined -12% to \$0.80/unit in 2010, but increased +48% to \$1.19/unit in 2011
- The rolling 12-month average was 17.5 million units per month and ASP of \$1.12/unit
 - ASP was the lowest during Oct'10 at \$0.87/unit, which coincides with when volume peaked at 23.8 million units sold

- **South Central versus Total U.S. trends**

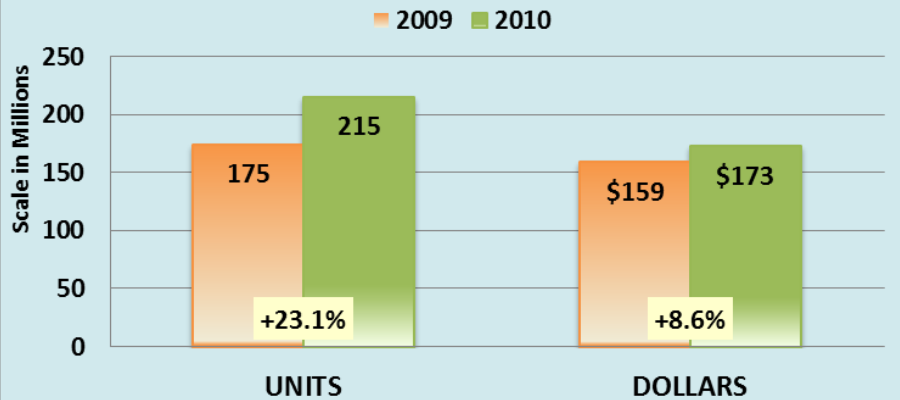
- South Central's category unit trend of -28% was -11 points below the national average of -16%
- South Central's category dollar trend of +7% was -1 point below the national average of +8%
- South Central's 2011 category ASP of \$1.19/unit was -2% lower than the national average of \$1.21/unit





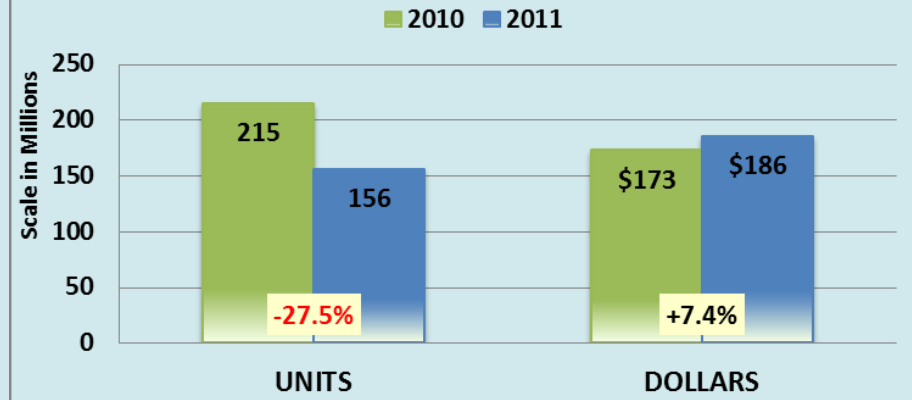
South Central: Region Retail Sales Overview

Units and Dollar Sales January - September



Jan-Sep	2009	2010	09v10
Category ASP/Unit	\$ 0.91	\$ 0.80	-11.8%

Units and Dollar Sales January - September



Jan-Sep	2010	2011	10v11
Category ASP/Unit	\$ 0.80	\$ 1.19	+48.1%

- Category units grew +23% in 2010, but declined -28% in 2011
- Category dollars experienced consecutive growth of +9% in 2010, and +7% in 2011
- Category average selling price (ASP) declined -12% to \$0.80/unit in 2010, but increased +48% to \$1.19/unit in 2011





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

JANUARY - SEPTEMBER: 2010 vs 2011

UNITS		South Central			Total U.S.		
PLU	Description	2010	2011	Variance	2010	2011	Variance
4046	Small Hass #60 sizes & smaller	124,108	84,559	-31.9%	386,205	314,231	-18.6%
4225	Large Hass #40 & #48 sizes	56,371	32,269	-42.8%	488,726	347,908	-28.8%
4770	X-Large Hass #36 sizes & larger	23,812	27,436	+15.2%	41,629	40,363	-3.0%
Other	Greenskins, Pinkertons, non-Hass PLUs	1,348	1,559	+15.6%	20,734	25,000	+20.6%
Organic	All Organic PLUs	1,089	1,234	+13.4%	11,343	9,715	-14.3%
Bags	All bagged PLUs	8,313	8,930	+7.4%	136,711	167,884	+22.8%
TOTAL CATEGORY UNITS (add '000s)		215,041	155,987	-27.5%	1,085,348	905,102	-16.6%
DOLLARS		South Central			Total U.S.		
PLU	Description	2010	2011	Variance	2010	2011	Variance
4046	Small Hass #60 sizes & smaller	\$ 65,318	\$ 76,655	+17.4%	\$ 284,396	\$ 346,791	+21.9%
4225	Large Hass #40 & #48 sizes	\$ 68,347	\$ 53,897	-21.1%	\$ 577,197	\$ 557,668	-3.4%
4770	X-Large Hass #36 sizes & larger	\$ 32,842	\$ 46,953	+43.0%	\$ 66,133	\$ 77,589	+17.3%
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 2,094	\$ 2,752	+31.4%	\$ 34,896	\$ 43,138	+23.6%
Organic	All Organic PLUs	\$ 1,631	\$ 2,123	+30.2%	\$ 17,996	\$ 20,225	+12.4%
Bags	All bagged PLUs	\$ 2,430	\$ 3,124	+28.5%	\$ 36,148	\$ 53,846	+49.0%
TOTAL CATEGORY DOLLARS (add '000s)		\$ 172,662	\$ 185,504	+7.4%	\$ 1,016,767	\$ 1,099,258	+8.1%
AVERAGE SELLING PRICE (ASP) / UNIT		South Central			Total U.S.		
PLU	Description	2010	2011	Variance	2010	2011	Variance
4046	Small Hass #60 sizes & smaller	\$ 0.53	\$ 0.91	+72.2%	\$ 0.74	\$ 1.10	+49.9%
4225	Large Hass #40 & #48 sizes	\$ 1.21	\$ 1.67	+37.8%	\$ 1.18	\$ 1.60	+35.7%
4770	X-Large Hass #36 sizes & larger	\$ 1.38	\$ 1.71	+24.1%	\$ 1.59	\$ 1.92	+21.0%
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 1.55	\$ 1.77	+13.7%	\$ 1.68	\$ 1.73	+2.5%
Organic	All Organic PLUs	\$ 1.50	\$ 1.72	+14.8%	\$ 1.59	\$ 2.08	+31.2%
Bags	All bagged PLUs	\$ 0.29	\$ 0.35	+19.7%	\$ 0.26	\$ 0.32	+21.3%
CATEGORY ASP		\$ 0.80	\$ 1.19	+48.1%	\$ 0.94	\$ 1.21	+29.6%

- South Central's category unit trend of -27% was -11 points below the national average of -16%**
 - South Central's PLU 4046, (their #1 selling segment) unit trend of -32% was -13 points below the national average
- South Central's category dollar trend of +7% was -1 point below the national average of +8%**
 - South Central's PLU 4225, (their #2 selling segment) dollar trend of -21% was -18 points below the national average
- South Central's 2011 category ASP of \$1.19/unit was -2% lower than the national average**

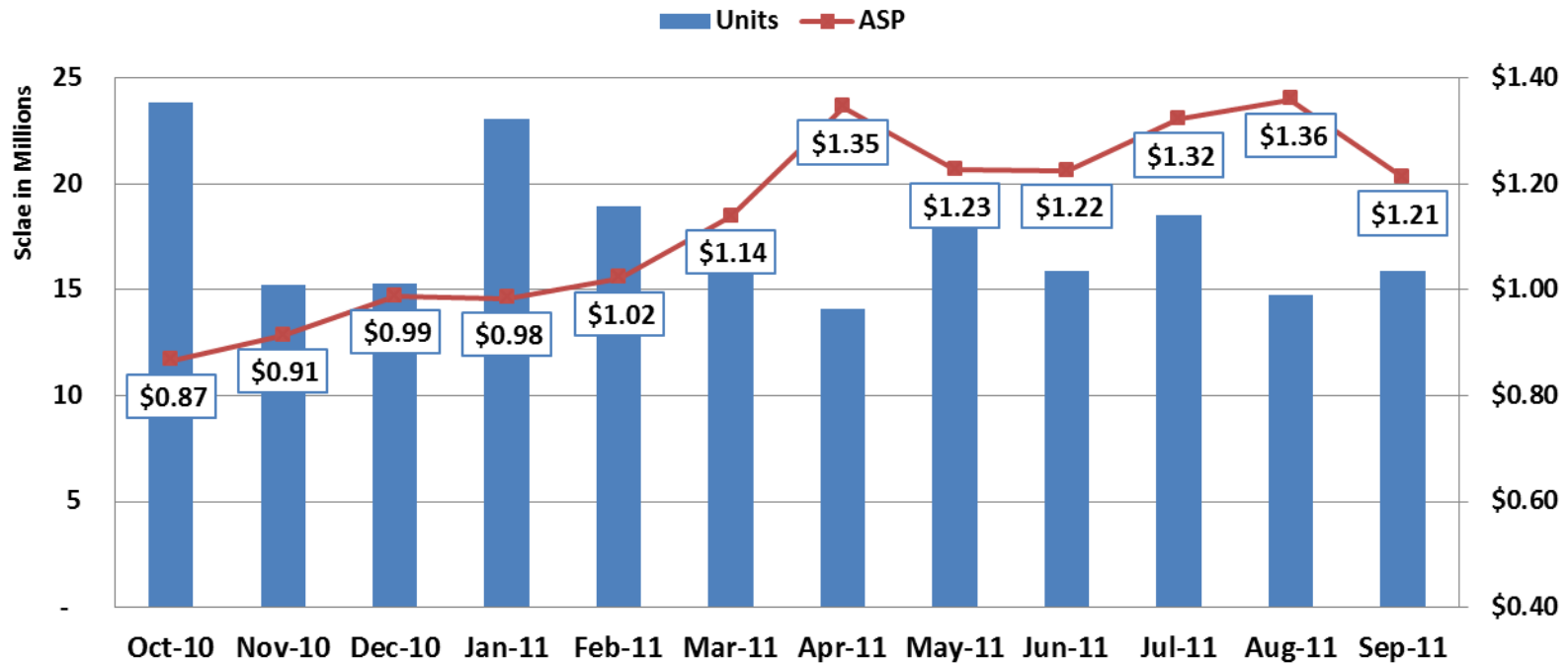




South Central Total Category by Month: Units to ASP (rolling 12-months)

- **The rolling 12-month average was 17.5 million units per month at \$1.12/unit**
 - The recent 6-months (Apr'11-Sep'11) showed an average of 16.3 million units each month, -13% lower than the prior 6-months average of 18.7 million units
 - Oct'10 was the peak of the 12-months observed with 23.8 million units sold
- **ASP was the lowest during Oct'10 at \$0.87/unit**
 - The recent 6-months (Apr'11-Sep'11) showed an ASP of \$1.28/unit, +31% higher than the prior 6-months which had an ASP of \$0.98/unit

Monthly Units vs. Average Selling Price (\$/Unit)





South Central: Region Highlights

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

- Dallas, TX; Houston, TX; Little Rock, AR

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- **South Central versus Total U.S. trends**

- South Central's category unit trend of -28% was -11 points below the national average of -16%
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- South Central's 2011 category ASP of \$1.19/unit was -2% lower than the national average of \$1.21/unit





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**

