



## **Avocado Regional Composite**

## **West 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**





## **West: Region Highlights**

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

- Boise, ID; Denver, CO; Las Vegas, NV; Phoenix, AZ; Portland, OR; Seattle, WA; Spokane, WA

- **West Overview**

- Category units grew +37% in 2010, but declined -19% in 2011
- Category dollars experienced consecutive growth of +10% in 2010, and +7% in 2011
- Category average selling price (ASP) declined -20% to \$0.90/unit in 2010, but increased +32% to \$1.18/unit in 2011
- The rolling 12-month average was 19.9 million units per month and ASP of \$1.11/unit
  - ASP was the lowest during Jan'11 at \$0.86/unit which coincides with when volume peaked at 27.9 million units

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

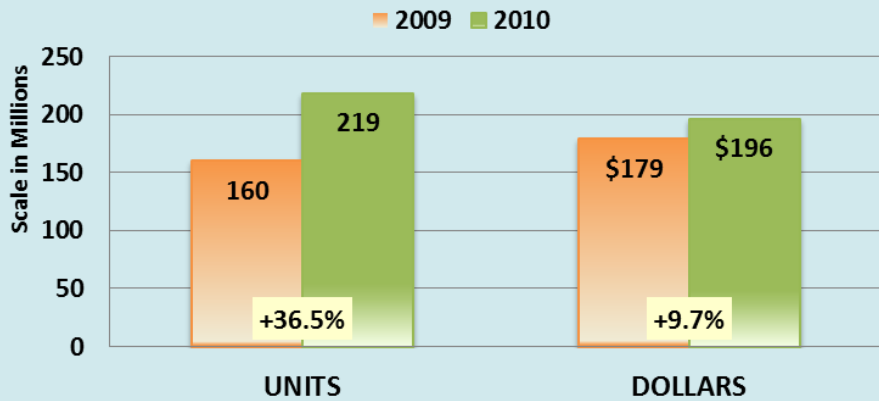
- West's category unit trend of -19% was -2 points below the national average
- West's category dollar trend of +7% was -1 point below the national average
- West's 2011 category ASP of \$1.18/unit was -3% lower than the national average of \$1.21/unit





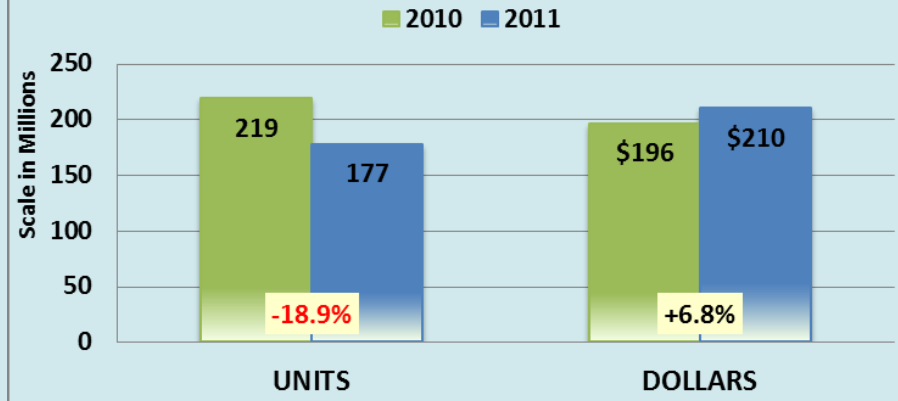
# West: Region Retail Sales Overview

### Units and Dollar Sales January - September



Jan-Sep	2009	2010	09v10
Category ASP/Unit	\$ 1.12	\$ 0.90	-19.6%

### Units and Dollar Sales January - September



Jan-Sep	2010	2011	10v11
Category ASP/Unit	\$ 0.90	\$ 1.18	+31.7%

- Category units grew +37% in 2010, but declined -19% in 2011
- Category dollars experienced consecutive growth of +10% in 2010, and +7% in 2011
- Category average selling price (ASP) declined -20% to \$0.90/unit in 2010, but increased +32% to \$1.18/unit in 2011





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

JANUARY - SEPTEMBER: 2010 vs 2011

UNITS		West			Total U.S.		
PLU	Description	2010	2011	Variance	2010	2011	Variance
4046	Small Hass #60 sizes & smaller	109,984	95,607	-13.1%	386,205	314,231	-18.6%
4225	Large Hass #40 & #48 sizes	87,937	60,348	-31.4%	488,726	347,908	-28.8%
4770	X-Large Hass #36 sizes & larger	2,052	1,154	-43.7%	41,629	40,363	-3.0%
Other	Greenskins, Pinkertons, non-Hass PLUs	610	965	+58.2%	20,734	25,000	+20.6%
Organic	All Organic PLUs	3,837	2,981	-22.3%	11,343	9,715	-14.3%
Bags	All bagged PLUs	14,190	16,215	+14.3%	136,711	167,884	+22.8%
<b>TOTAL CATEGORY UNITS (add '000s)</b>		<b>218,611</b>	<b>177,271</b>	<b>-18.9%</b>	<b>1,085,348</b>	<b>905,102</b>	<b>-16.6%</b>
DOLLARS		West			Total U.S.		
PLU	Description	2010	2011	Variance	2010	2011	Variance
4046	Small Hass #60 sizes & smaller	\$ 85,577	\$ 107,332	+25.4%	\$ 284,396	\$ 346,791	+21.9%
4225	Large Hass #40 & #48 sizes	\$ 95,927	\$ 85,701	-10.7%	\$ 577,197	\$ 557,668	-3.4%
4770	X-Large Hass #36 sizes & larger	\$ 4,572	\$ 2,957	-35.3%	\$ 66,133	\$ 77,589	+17.3%
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 526	\$ 872	+65.7%	\$ 34,896	\$ 43,138	+23.6%
Organic	All Organic PLUs	\$ 5,951	\$ 6,126	+2.9%	\$ 17,996	\$ 20,225	+12.4%
Bags	All bagged PLUs	\$ 3,805	\$ 6,635	+74.4%	\$ 36,148	\$ 53,846	+49.0%
<b>TOTAL CATEGORY DOLLARS (add '000s)</b>		<b>\$ 196,359</b>	<b>\$ 209,624</b>	<b>+6.8%</b>	<b>\$ 1,016,767</b>	<b>\$ 1,099,258</b>	<b>+8.1%</b>
AVERAGE SELLING PRICE (ASP) / UNIT		West			Total U.S.		
PLU	Description	2010	2011	Variance	2010	2011	Variance
4046	Small Hass #60 sizes & smaller	\$ 0.78	\$ 1.12	+44.3%	\$ 0.74	\$ 1.10	+49.9%
4225	Large Hass #40 & #48 sizes	\$ 1.09	\$ 1.42	+30.2%	\$ 1.18	\$ 1.60	+35.7%
4770	X-Large Hass #36 sizes & larger	\$ 2.23	\$ 2.56	+14.9%	\$ 1.59	\$ 1.92	+21.0%
Other	Greenskins, Pinkertons, non-Hass PLUs	\$ 0.86	\$ 0.90	+4.7%	\$ 1.68	\$ 1.73	+2.5%
Organic	All Organic PLUs	\$ 1.55	\$ 2.06	+32.5%	\$ 1.59	\$ 2.08	+31.2%
Bags	All bagged PLUs	\$ 0.27	\$ 0.41	+52.6%	\$ 0.26	\$ 0.32	+21.3%
<b>CATEGORY ASP</b>		<b>\$ 0.90</b>	<b>\$ 1.18</b>	<b>+31.7%</b>	<b>\$ 0.94</b>	<b>\$ 1.21</b>	<b>+29.6%</b>

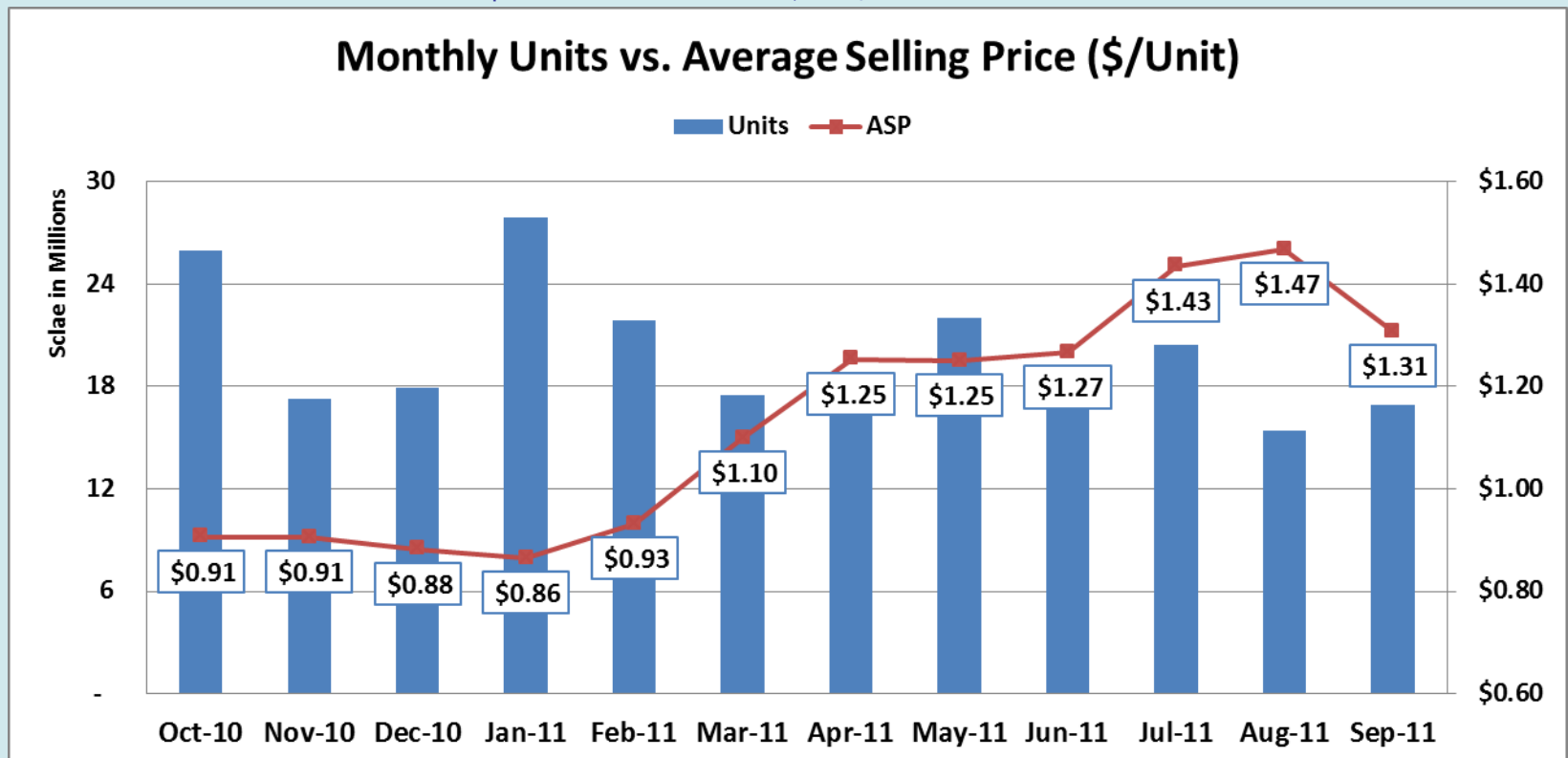
- West's category unit trend of -19% was -2 points below the national average
- West's category dollar trend of +7% was -1 points below the national average of +8%
- West's 2011 category ASP of \$1.18/unit was -3% lower than the national average of \$1.21/unit





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

- **The rolling 12-month average was 19.9 million units per month at \$1.11/unit**
  - The recent 6-months (Apr'11-Sep'11) showed an average of 18.3 million units each month, -14% lower than the prior 6-months average of 21.4 million units
  - Jan'11 was the peak of the 12 months observed with 27.9 million units sold
- **ASP was lowest during Jan'11 at \$0.86/unit**
  - The recent 6-months (Apr'11-Sep'11) showed an ASP of \$1.33/unit which was +44% higher than the prior 6-months ASP of \$0.92/unit





## **West: Region Highlights**

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

- Boise, ID; Denver, CO; Las Vegas, NV; Phoenix, AZ; Portland, OR; Seattle, WA; Spokane, WA

- **West Overview**

- Category units grew +37% in 2010, but declined -19% in 2011
- Category dollars experienced consecutive growth of +10% in 2010, and +7% in 2011
- Category average selling price (ASP) declined -20% to \$0.90/unit in 2010, but increased +32% to \$1.18/unit in 2011
- The rolling 12-month average was 19.9 million units per month and ASP of \$1.11/unit
  - ASP was the lowest during Jan'11 at \$0.86/unit which coincides with when volume peaked at 27.9 million units

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

- West's category unit trend of -19% was -2 points below the national average
- West's category dollar trend of +7% was -1 point below the national average
- West's 2011 category ASP of \$1.18/unit was -3% 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**

