



HASS AVOCADOS

ABSTRACT 2010 State of the Category (SoC)

Type: Retail Report

Purpose:

To provide a comprehensive avocado category review detailed by IRI region, and how the avocado trends compare to total fruit trends. It is typically a lengthy report over 100 pages that provides several metrics and analytical views. This report measures the performance of the avocado category over three-consecutive years across all IRI regions plus Total U.S., and includes trends for the total avocado category, organic avocados versus conventional avocados and Hass Avocados only.

IRI Regions included in report:

- California
- Great Lakes
- Midsouth
- Northeast
- Plains
- South Central
- Southeast
- West
- Total U.S.

Key Benefits/Attributes:

The SoC is most useful to those looking to learn specifics about avocado category retail trends, share and indices in their given region.

It's a powerful report that is most useful as a planning tool because it includes several metrics and year-over-year comparisons as well region comparisons for:

- Avocado dollar region share of Total U.S.
- Avocado category dollar share of Total Fruit
- Avocado dollar and volume trends for total category, Hass Avocados, Non-Hass Avocados and Organic Avocados
- Hass Avocado share of total category
- Hass Avocados versus Non-Hass Avocado volume and dollar contributions
- Avocado trends versus Total Fruit trends
- Category average selling prices and trends
- Holiday dollars comparisons for the most recent year
- Size/PLU detail for the current year versus the prior year
- Quarterly volume with average selling prices over a three-year timeframe
- Annual review by quarter for volume versus average selling price
- DMA snapshots by region which include category trends and average selling prices
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Results / Conclusion:

National Overview

- *Hass Avocado were the dominant variety of Avocados sold in the Total U.S. accounting for over 92%*
- *From 2008 to 2010, the total avocado category across all regions outpaced the Total Fruits dollar and volume trends by double-digits*
 - *Avocado average selling price for all regions declined at a faster rate than Total Fruits, except for the Southeast which experienced an increase during this time*
 - *Organic Avocados volume and dollar trends, in most regions, grew at a faster rate than Hass Avocados and the Total Fruits category; however, they account for a small percentage of the category*
- *From 2009 to 2010, Avocado category volume growth of +26.7% was driven by PLU 4046, PLU 4225 and Bagged Avocados*
 - *Collectively, these three accounted for 93% of the total category volume*
 - *PLU 4046 volume increased +34.8% (+123.4 million units), and accounted for 35% of the category volume*
 - *PLU 4225 volume increased +17.4% (+90.5 million units), and accounted for 45% of the category volume*
 - *Bagged Avocados volume increased +33.9% (+43.3 million units), and accounted for 13% of the category volume*
- *On a national average, the Memorial Day, Father's Day, Independence Day and Thanksgiving holiday dollar contributions underperformed the Total Fruits contributions*
 - *There may be opportunity to promote and further drive category sales during these time periods to maximize their fair share of Total Fruits*

Regional Overview

- *From 2008 to 2010, the MidSouth region experienced the largest volume (+80.4%) and dollar (+40.0%) gains*
- *California, South Central and West regions contributed the most to Avocado category, collectively accounting for 64% of Total U.S. category volume and 59% of category dollars*
- *The Northeast region has the most potential to continue growing the Avocado category*
 - *Avocado dollar share of Total U.S. averaged 11.2%, whereas its Total Fruits averaged 18.6%, the largest gap of all the regions*
 - *From 2008 to 2010, the Avocado volume and dollar trends grew by double-digits each year, outpacing the Total Fruits trends by more than +12 points each year*
 - *The share gap coupled with its consistently strong growth trends shows that this region has room to further grow its Avocado category*



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Usage:

The SoC measures and compares category shares and avocado category trends by region so that regions can be evaluated individually as well as in comparison to one another to identify which regions are showing significant changes.

Use this report as a research and planning tool:

- *What are the significant trends in one region or another?*
- *Where might there be opportunity for you to do more marketing or sell into a specific region you had not targeted in the past?*
- *Is there a holiday that should be better exploited to further drive avocado sales?*
- *What marketing programs can you offer or develop in order to further develop the avocado category for a given region?*
- *If you are targeting a specific region, what are the significant trends that are occurring and how do they compare to the Total U.S. figure? Are they over-performing or under-performing versus the Total U.S. average?*
 - *If under-performing, what holidays or sizes or time periods need to be better addressed (with marketing programs or stimulate retailer relationships) in order to help the overall category perform better?*

Time Frame / Frequency:

Report data includes: 2008, 2009, 2010. This report is updated every two years.

Sources:

*Retail Data - SymphonyIRI Group / FreshLook Marketing
Report prepared by – Fusion Marketing*