

2025 Consumer Tracking Study Shows Improvement in Key Metrics

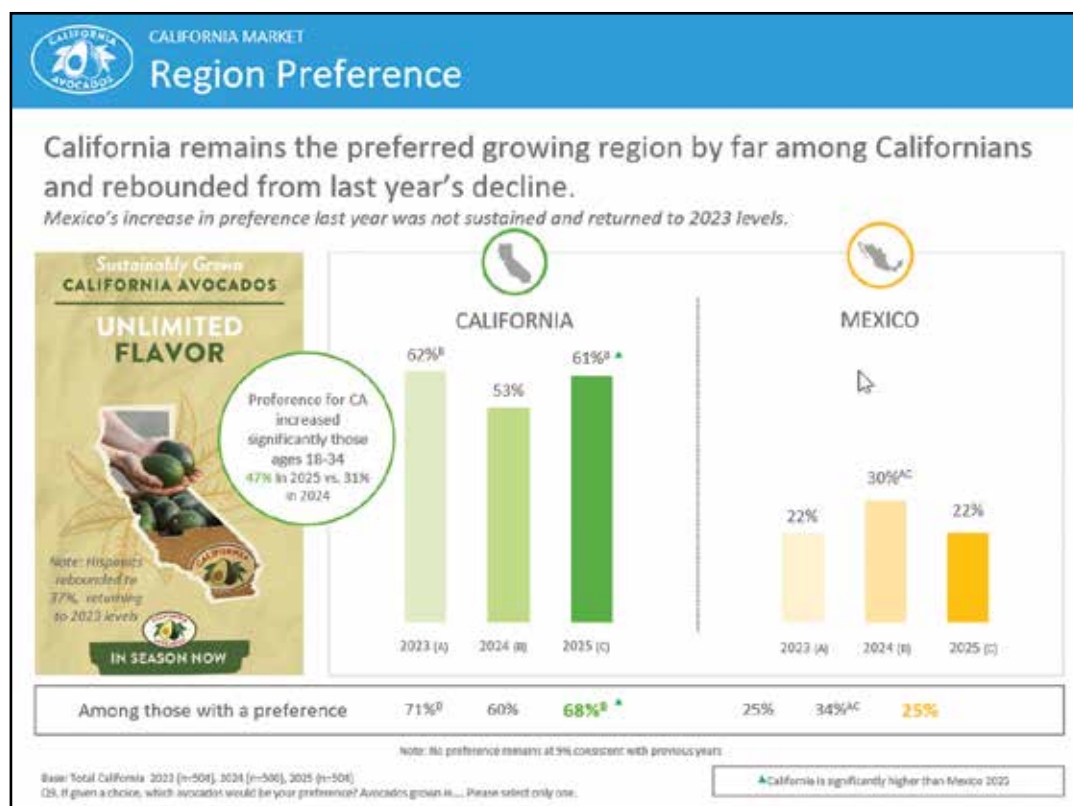
Building brand loyalty and purchases of California avocados at a premium price is a key objective of the California Avocado Commission. To do that, a tracking study is conducted annually to better understand consumer behavior and attitudes and help determine how best to communicate with targeted consumers. The results of the 2025 California Avocado Tracking Study show marked improvement in a variety of key metrics and provide insights about what avocado shoppers' interests and preferences are.

The 2025 California Avocado Tracking Study was fielded in July and August 2025, with results presented to the CAC Board of Directors in the fall. Online interviews took place with 1,403 avocado shoppers from California, individual states in the West (Arizona, Colorado, Oregon, Utah, Washington) and in the Central, South and Northeast Regions. Data from each of these states and regions, as well as a projection to the total United States, is available and was studied by the CAC

marketing team. This article focuses on key learnings from the California market where the majority of California avocados are purchased.

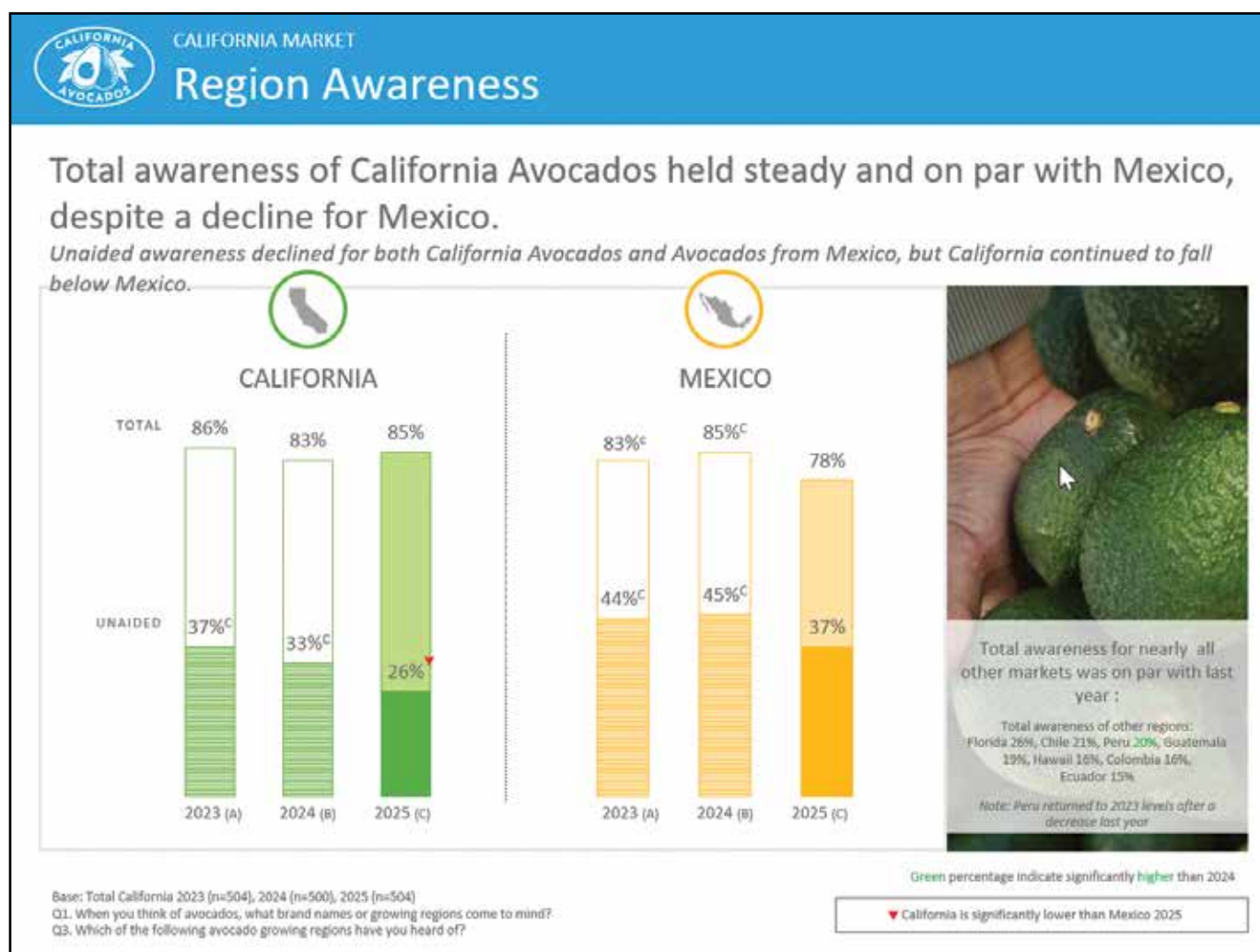
Tracking Study Highlights for the California Market *Preference for California avocados improved.*

California remains the preferred growing region by far among Californian avocado shoppers. With reduced marketing investment in 2024, preference for California had declined. However, following increased investment in 2025, California preference rebounded to 61% compared to 22% preference for avocados from Mexico and less for other regions. Preference for California avocados also increased among ages 18 to 24, fulfilling a CAC objective from the business plan. Hispanic Californians continue to prefer avocados from Mexico, but to a lesser degree than in 2024 at 45%; 37% of Hispanic Californians now prefer California avocados.



Awareness of California avocados held steady. Total region awareness of California avocados — measured by asking consumers directly if they are aware of California avocados — continues to be strong and on par with awareness of avocados from Mexico. Total awareness of California is higher among ages 25 and older at 86%, and awareness improved among the younger age group of 18 to 24, increasing from 64% in 2024 to 77% in 2025. Unaided awareness for California — measured first by asking consumers what brands or origins of avocados they are aware of — declined and is significantly below Mexico, despite a decline for Mexico too.

The study also measures awareness of advertising for avocados. In 2025, total ad awareness for California avocados remained steady and on par with Mexico. Mexico experienced a decline in top-of-mind awareness, returning to 2023 levels. However, top-of-mind ad awareness for California continues to be below Mexico. On the positive side, more than half of respondents said they had been seeing or hearing a lot of advertising or buzz for California avocados — which is about the same as for Mexico’s advertising — despite Avocados from Mexico having a significantly larger marketing budget than CAC.

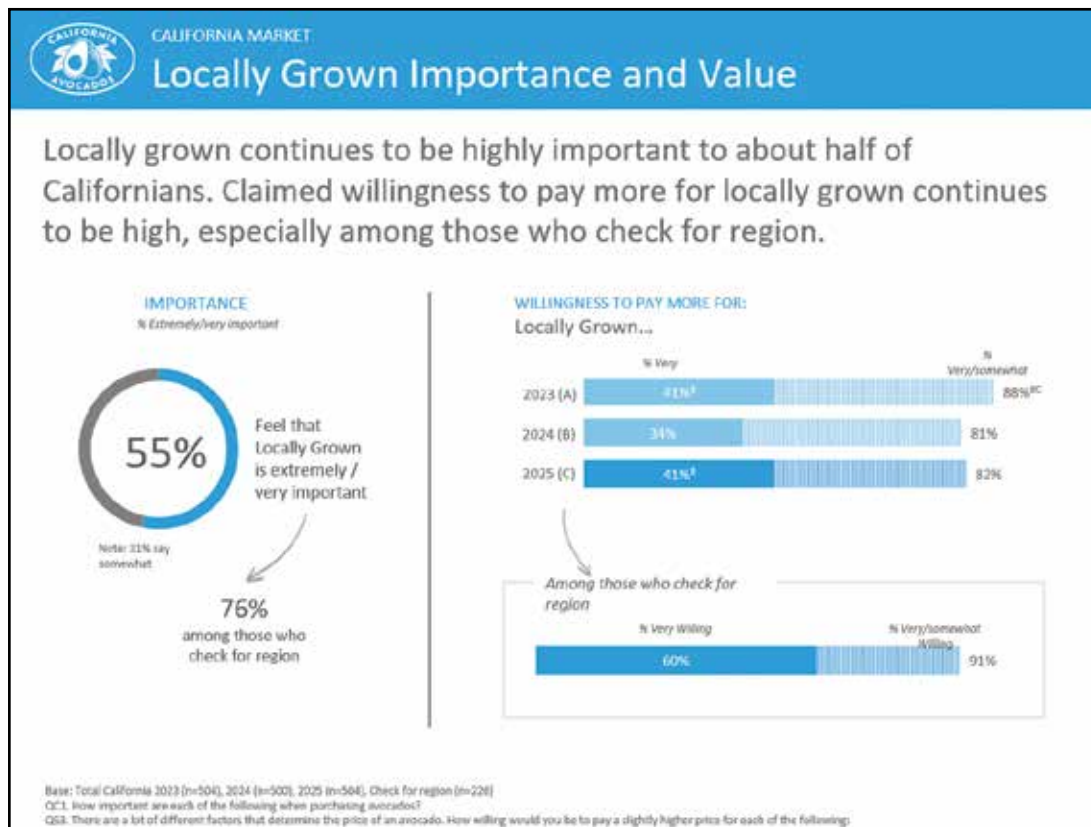


Very positive perceptions about California avocados

continue. California avocados are perceived as the best on all quality, taste and safety measures surveyed. In California as well as the Western region, California avocados continue to exceed Mexico and all other origins on positive product perceptions. Particularly notable was a significant increase in those who said California avocados are the best avocados, up from 63% in 2024 to 71% in 2025.



Consumers say they are willing to pay more for attributes that align with California avocados. “Grown in California” and “locally grown” continue to be important to avocado shoppers and are viewed as worth paying more for. This is especially true for consumers ages 25 and up and those who check for origin when shopping for avocados. There also continues to be a high willingness to pay for avocados grown with sustainable farming practices at 80%. Similarly, 79% say they are willing to pay more for ethically sourced avocados.



The tracking study shows that CAC’s key messages about sustainability and ethical sourcing align with consumer values, with 86% being at least somewhat interested in learning more. All surveyed sustainability associations with California avocados are strong, and about half of these values increased versus the prior year.

Ethically sourced related ratings for avocados from Mexico improved versus 2024, but California avocados continue to be viewed as more ethically sourced than avocados from Mexico at 67% versus 55%.



How is the research used? The tracking study provides a wealth of information that helps the marketing team direct consumer communications. The Commission shares key information with handlers and customers, including fact-based sales points for retailers and foodservice operators. For example, highlights from past tracking studies were used to show handlers the value of prominently featuring the California origin on labels and packaging, as was manifested in 2025 on multiple handlers' avocado bags. CAC also utilizes

key data from the study to encourage retailers to carry California avocados in season and feature the brand on shelf and in displays, as well as to help build a sales story for foodservice to carry and promote California avocados in season.

The tracking study also is used to measure marketing progress against specified goals; the Commission set objectives and performance measures in the 2024-25 annual business plan, some of which were measured by the tracking study results and reported to the Board of Directors. 🥑

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