

НОМЕ

REVENUE

CONSUMER ADVERTISING

ONLINE & SOCIAL MEDIA

CONSUMER PR

RETAIL

FOODSERVICE

RESEARCH

KEY PERFORMANCE INDICATORS: NOVEMBER 2018 THROUGH APRIL 2019

\$1.00

Average Selling Price

Category Average Selling Price per Unit for the 4-weeks ending March 24, 2019 30.8 Million

Consumer Media Impressions

Includes offline, online and social media impressions through April 2019

183.5 Million

Consumer PR Impressions

Media coverage secured with print, broadcast and online media outlets through April 2019

3.4 Million

Trade Public Relations Impressions

Positive direct CAC trade public relations circulation through April 2019

1.03 Million

Consumer Website Visits

A 24% decrease in visits to CaliforniaAvocado.com versus the same period in 2018 7

Foodservice Chain Promotions

Number of Foodservice chain promotions scheduled (90 chains contacted)







CONSUMER ADVERTISING ONLINE & SOCIAL MEDIA



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REVENUE - CROP MOVEMENT AND MEASURES

U.S. Hass Avocado Supply (November-April)								
	2018/1	9	2017/1	8	2016/17			
		Est. %		%		%		
Origin	Volume (MM lbs)	Complete*	Volume (MM lbs)	Complete	Volume (MM lbs)	Complete		
California	51	29%	107	32%	72	33%		
Chile	34	48%	22	44%	46	51%		
Mexico	1,216	62%	1,069	56%	955	58%		
Peru	0	0%	0	0%	0	0%		
Other	6	103%	2	49%	4	48%		
Total	1,307	55%	1,200	48%	1,077	51%		
*based on current projections					Source: HAB/CAC			



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REVENUE - CROP MOVEMENT AND MEASURES

		November 1 -April 30, 2019				November 1 - April 30, 2018							
		(millions)		%			(millions)				%		
Grade	Size	Size %	Pounds	Dollars	Avg	Lug \$	Consigned	Size %	Pounds	Dollars	Avg Lug \$		Consigned
Hass #1 Conv	40	11%	3.0	5.9	\$	49.77	1%	7%	5.3	8.4	\$	40.54	3%
	48	44%	11.6	22.5	\$	49.09	1%	36%	26.4	42.5	\$	40.53	1%
	60	23%	6.1	11.0	\$	46.08	2%	29%	20.9	28.4	\$	34.25	1%
	70	9%	2.5	4.4	\$	44.73	2%	16%	11.5	13.2	\$	29.04	1%
	84	4%	1.0	1.1	\$	29.62	4%	7%	5.4	4.8	\$	22.50	1%
	All		26.4	48.6	\$	46.84	2%		73.3	102.2	\$	35.22	1%
Hass #2 Conv	All		1.8	2.7	\$	38.20	3%		7.0	7.0	\$	25.99	4%
Hass #1 Organic	All		2.9	6.5	\$	55.28	1%		6.9	11.8	\$	43.20	1%
	C	alifornia	Avocad	o Regio	on D	Distri	bution -	This Ye	ar vs. La	st Year			
November 1 -April 30, 2019						November 1 - April 30, 2018							
			(millio	illions)		%		(millions)				%	
Region Reg		Region %	Pounds	Dollars	Avg	Lug \$	Consigned	Region %	Pounds	Dollars	Av	g Lug \$	Consigned
EAST CENTRAL		2%	0.5	1.0	\$	47.65	5%	1%	1.2	1.5	\$	32.68	1%
NORTHEAST		3%	0.9	1.7	\$	50.78	0%	1%	1.2	1.7	\$	34.97	1%
PACIFIC		75%	23.6	42.9	\$	46.42	2%	79%	69.2	93.7	\$	34.34	1%
SOUTHEAST		2%	0.7	1.4	\$	49.43	0%	1%	0.5	0.8	\$	36.51	0%
SOUTHWEST		2%	0.6	1.0	\$	44.54	0%	2%	1.8	2.2	\$	31.41	0%
WEST CENTRAL		3%	1.1	2.2	\$	50.26	0%	2%	1.9	2.5	\$	34.26	0%
EXPORT		13%	4.1	7.9	s	48.99	1%	14%	12.1	19.2	\$	39.91	1%







CONSUMER ADVERTISING ONLINE & SOCIAL MEDIA CONSUMER PR

RETAIL

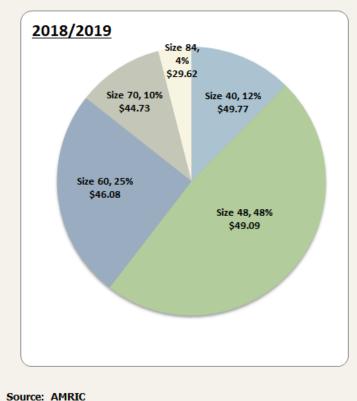
FOODSERVICE

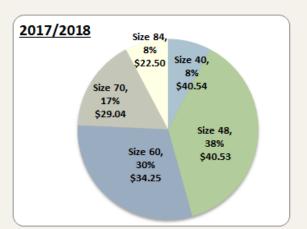
RESEARCH

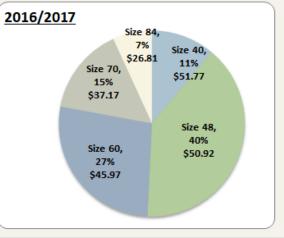
REVENUE – CROP MOVEMENT AND MEASURES

Size Distribution and Average Lug Price

Hass #1 Conventional (November-April)











CONSUMER ADVERTISING ONLINE & SOCIAL MEDIA

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REVENUE - RETAIL SALES AND VOLUME

<u>RETAIL</u> (4 wks)	<u>Mar-2018</u> (3/4/18 – 3/25/18)	<u>Mar-2019</u> (3/3/19 - 3/24/19)	<u>Variance</u>	
Volume (Unit)	175,821,910	197,028,478	+12.1%	
Dollars	\$190,989,759	\$197,758,149	+3.5%	
Avg. Selling Price/Unit	\$1.09	\$1.00	-7.6%	
<u>RETAIL</u> <u>California Season</u>	<u>Apr-Sep17</u> (4/2/17 – 9/24/17)	<u>Apr-Sep18</u> (4/1/18 – 9/23/18)	<u>Variance</u>	
Volume (Unit)	895,052,842	1,188,327,329	+32.8%	
Dollars	\$1,234,584,114	\$1,315,951,277	+6.6%	
Avg. Selling Price/Unit	\$1.38	\$1.11	-19.7%	
<u>RETAIL</u> <u>Non-California Season</u>	<u>Oct17-Mar18</u> (10/1/17 - 3/25/18)	<u>Oct18-Mar19</u> (9/30/18 – 3/24/19)	<u>Variance</u>	
Volume (Unit)	972,855,919	1,116,600,644	+14.8%	
Dollars	\$1,133,125,002	\$1,166,535,779	+2.9%	
Avg. Selling Price/Unit	\$1.16	\$1.04	-10.3%	







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REVENUE - RETAIL SALES AND VOLUME

Avg. Retail Price \$1.38



Apr - Sep 2017 (4/2/17 - 9/24/17) Avg. Retail Price \$1.04

Off Season

Oct 2018 – Mar 2019 (9/30/18 – 3/24/19) Avg. Retail Price \$1.11



Apr – Sep 2018 (4/1/18 – 9/23/18)



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CONSUMER ADVERTISING – OUTDOOR

- 3,493,268 Impressions
- Six locations in Los Angeles, San Francisco, San Diego and Orange County







CONSUMER ADVERTISING

ONLINE & SOCIAL MEDIA



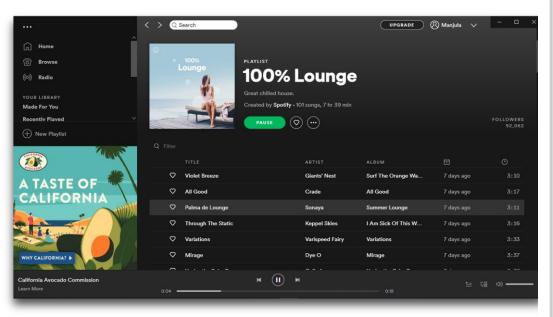






CONSUMER ADVERTISING – AUDIO: SPOTIFY

- · Sponsored Listening sessions, audio and overlays
- Targeted to California artists, cooking and dinner party playlists and outdoor lifestyle playlists











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CONSUMER ADVERTISING – DIGITAL - BRAND

- · Digital video, mobile and display banners
- 793,891 YouTube Impressions for Preseason video



















TASTEMADE





CONSUMER ADVERTISING

ONLINE & SOCIAL MEDIA



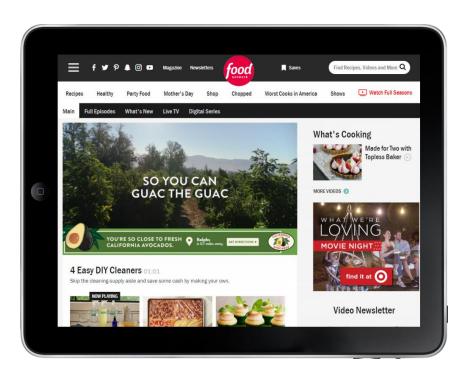






CONSUMER ADVERTISING – DIGITAL - RETAIL

- Digital video, mobile and display banners
- Utilizing store location data to drive users to retail stores









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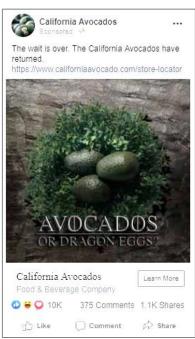
RESEARCH

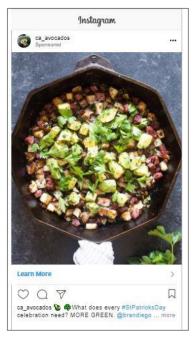
CONSUMER ADVERTISING - SOCIAL - BRAND

- 1,426,278 Impressions
- 285,106 Engagements with a 19.9% Engagement Rate
- Season-long social advertising across top platforms





















CONSUMER **ADVERTISING**

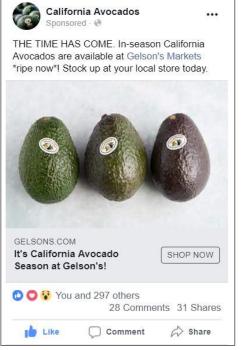
ONLINE & SOCIAL MEDIA CONSUMER PR

RETAIL



CONSUMER ADVERTISING – SOCIAL - RETAIL

- 528,498 Impressions
- 6,059 Engagements with a 1.15% Engagement Rate
- Hyper-targeted social for each retailer





















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ONLINE MARKETING: NOVEMBER 2018 – APRIL 2019

CONSUMER WEBSITE

• # of Visits: 1.03MM (-24% decrease YoY)

Page Views/Visit: 1.32 (-2% decrease YoY)

• Time on site: 0:41s (-2% decrease YoY)

• Total Page Views: 1.5MM (-22% decrease YoY)

CONSUMER BLOG

• # of Visits: 441.2K (30% increase YoY)

• Time on site: 2:53 (65% increase YoY)

NOTES

- Facebook, Twitter, Instagram, and Pinterest posts ran during preseason and to kick off the season, reaching a premium audience that resulted in a high number of engagements
- Retail campaigns ran on Facebook, Twitter, and Instagram and were hyper-targeted with messaging that was customized for each retailer

SOCIAL MEDIA

- Facebook
 - Total Fans: 330.2K (-1% decrease YoY)
 - Impressions: 662.6K (-83% decrease YoY)
- Twitter
 - Total Followers: 20.2K (4% increase YoY)
 - Total Retweets: 311 (94% decrease YoY)
- YouTube
 - Views: 926.6K (124% increase YoY)
 - Subscribers: 1,069 (45% increase YoY)
- Instagram
 - Followers: 42.5K (13% increase YoY)
 - Impressions: 807.7K (-81% decrease YoY)

EMAIL

- Average Open Rate: 18.4%
- Click through rate: 2.6%
- Emails Sent: 1 email to an average of 200k successful deliveries



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CONSUMER PUBLIC RELATIONS – NEWS BUREAU

- Fulfilled both proactive and ongoing responsive requests from media covering California Avocados
- Total Impressions To Date: 176,387,973







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CONSUMER PUBLIC RELATIONS – SEASON OPENING ANTICIPATION

- Partnered with Chef Mike Fagnoni of Hawks Public House in Sacramento who developed iconic California recipes, hosted kickoff media/influencer event with live demo and distributed press release featuring the one-of-a-kind recipes and benefits of eating seasonally
- Total Impressions To Date: 35,216,152



Molly Hawks, Chef Mike Fagnoni and Jan DeLyser welcomed Season Opening Anticipation guests on 4/6 at Hawks Public School in Sacramento.



Media and influencer guests enjoyed a four-course lunch featuring California Avocados at Season Opening Anticipation event.



Chef Mike Fagnoni's California Avocado and Roasted Beet Salad, featured in Season Opening Anticipation campaign.





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CONSUMER PUBLIC RELATIONS – BLOGGER ADVOCATES

- Food Blogger Advocates and Health and Wellness Blogger Advocates develop and publish monthly California Avocado recipe posts through July. Ambassadors include bloggers from: Cooking with Cocktail Rings, Rustic Joyful Food, Yummy Healthy Easy, Kirbie's Cravings, The Roasted Root, Whitney Bond, Eating by Elaine and Meal Prep Chef
- Total Impressions To Date: 3,400,010











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RESEARCH

CONSUMER PUBLIC RELATIONS

Total consumer impressions secured to date: 183,494,883

EatingWell







*This is a comprehensive total of all PR-related coverage from November 1, 2018 – April 30, 2019. It includes print, broadcast and online coverage, as well as program extension coverage (such as social media posts from our Artisan Chefs, etc.), year-to-date, and therefore is higher than traditional media impressions.



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RESEARCH

CONSUMER REGISTERED DIETITIAN NUTRITIONIST (RDN) PROGRAM

RDNs developed four (4) new recipes for use on CAC website, blog, and social media platforms



Wild Rice Pilaf with California Avocado



Mashed Cauliflower with California Avocado



California Avocado Loaded Sweet Potatoes



California-style Stuffed Bell Peppers





CONSUMER ADVERTISING ONLINE & SOCIAL MEDIA





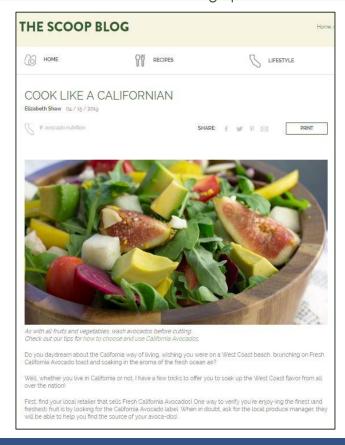


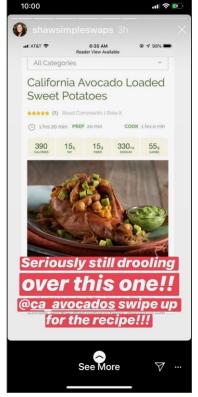
RESEARCH

CONSUMER REGISTERED DIETITIAN NUTRITIONIST PROGRAM

Elizabeth Shaw, MS, RDN, CLT, CPT -- The Scoop Blog and ShawsSimpleSwaps Instagram

https://www.californiaavocado.com/blog/april-2019/cook-like-a-californian







5-post Instagram Story: 2,139 impressions





CONSUMER ADVERTISING ONLINE & SOCIAL MEDIA







RESEARCH

CONSUMER REGISTERED DIETITIAN NUTRITIONIST PROGRAM

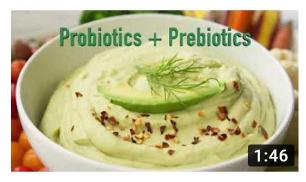
Manuel Villacorta, MS, RDN -- Video series about "gut health" lives on CAC's YouTube channel



Manuel's Minutes: Benefits of Avocado in Diets



How to Reduce Visceral Fat with California Avocados



Benefits of Probiotics & Prebiotics Foods for Gut...



How to Reduce Chronic Inflammation with Californi...



3 Types of Fiber in California Avocados



Benefits of Monounsaturated Fatty Acids







CONSUMER ADVERTISING ONLINE & SOCIAL MEDIA







RESEARCH

RETAIL - CUSTOMIZED RETAIL INFLUENCER PROGRAMS

Four (4) in-person meetings with targeted influencers to develop customized programs





In-store demo program at 4 stores (2 SoCal/2 NoCal); 4 three-hour demos per store during May and June



Team Education and Wellness Program includes giveaway of swag bags & cutters; California Avocado Consumer Sweepstakes on Raley's Facebook site during Memorial Day Week



Great Gelson's California Avocado Festival includes Superfood Spotlights and recipe booklets for in-store tours; blog for Gelson's website



Distribution of Superfood Spotlights at in-store events and one-on-one nutrition counseling with customers



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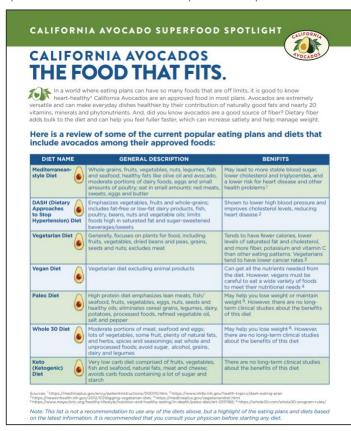
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RESEARCH

RETAIL - RETAIL PROMOTIONS

Two (2) California Avocado Superfood Spotlights were developed and distributed to Retail RDs at CAC's top-tier accounts to provide to consumers at point-of-purchase during California Avocado season





"While many factors affect heart disease, slets low in seturated fat and cholesterol may reduce the risk of heart disease









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RESEARCH

RETAIL - RETAIL PROMOTIONS

- Mollie Stone's kicked off the California Avocado season with a Big Game Sales
 & Display Contest (January 23 February 5)
- In February, Mollie Stone's ran a California Avocado and California Walnut Board co-marketing promotion featuring demos for Heart Health Month (February 6 – February 26)











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RESEARCH

RETAIL - RETAIL PROMOTIONS

- Gelson's Big Game Sales & Display Contest (January 23 February 5)
- Stores experienced sales increases versus prior year



Gelson's







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Bristol Farms

RESEARCH

RETAIL - RETAIL PROMOTIONS

- Passport to Savings Program (April 3 May 28)
- California Avocados featured in Bristol Farm's Passport to Savings digital offers supported by social media, digital materials and in-store signage









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RESEARCH

RETAIL - TRADE ADVERTISING - PRINT

THE PACKER





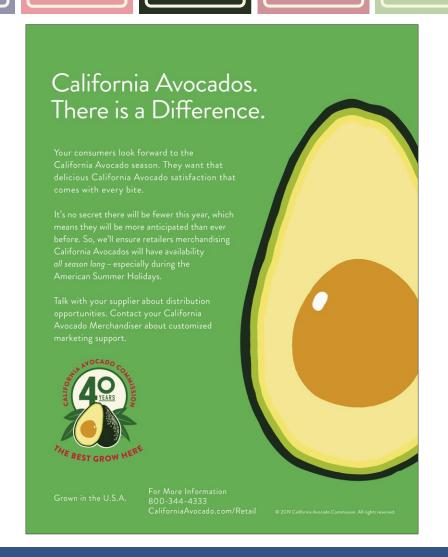
the SNACK







11 trade print ads running from March through April 30, 2019







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RETAIL - TRADE ADVERTISING - DIGITAL

THE PACKER











81 trade digital ads running from March through April 30, 2019

The total impressions for the March through April print and digital campaign are 6,917,282



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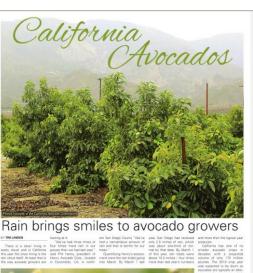
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RESEARCH

TRADE PUBLIC RELATIONS - NOVEMBER 2018 THROUGH APRIL 2019

- Proactive and ongoing reactive outreach to trade media covering California Avocados
- Distributed three press releases; numerous interviews and coverage from trade media guests at PR event
- Reached more than 3.4 million impressions







control file 2016 cmp seek were expected to be done in a woodso en fapical y an after a woodso en fapical y an after a woodso en fapical y an after a wood y and a seek a wood y and a fapical y followed by a down year. The 2016 con was allared to seek a seek a wood of the province of th

FOR INDUSTRY UPDATES YIBIT WWW.PRODUCENEWS.COM







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TRADE PUBLIC RELATIONS – SEASON OPENER HIGHLIGHTS

- Key topics included crop updates, marketing plans and season opener activities
- Coverage in all major produce trade publications





THE PRODUCE NEWS

Anticipation building for California avocado season

FEBRUARY 28, 2019

The California Avocado Commission is actively building anticipation for the 2019 California avocado season, teasing targeted consumers with social media communications and working with retailers and foodservice operators to set up timely crop transitions and customized promotions. Some smaller California retailers have already transitioned to California avocados, with early harvest inventory building in January to support the Super Bowl.

The current estimate for the California avocado crop for the CAC fiscal year (November 2018 to October 2019) is 175 million pounds, which is about half the volume of 2017-18.

Distribution will be targeted mainly to California and the West, With targeted distribution, the harvest season is expected to build into March with peak volume availability from April through July. Some volume may continue later, particularly from California's northernmost avocado-growing

"The commission is excited for the California avocado season start and the focused marketing support that is about to begin," said Jan DeLyser, CAC vice president marketing, "We're building anticipation,

letting targeted consumers know that the season is almost here via social media. The Scoop blog and communication by California avocado brand advocates."

CAC is continuing it's Made of California marketing campaign this year. Customized marketing programs with participating retailers and foodservice operators is also a major component of the California avocado support plan.

California avocado growing regions are receiving considerable rainfall early this season, which has created some delays in harvesting.

"Winter rains are very welcome, helping with tree health and fruit sizing," said DeLyser. "The California avocado growers whose crops were adversely impacted by last year's extreme temperatures are continuing to build for the future with good cultural practices

» California Avocado Commission

Dialing into consumer fervor for everything Thrones-related, the commission asks consumers to embrace their inner Targarven-and perhaps hatch a dragon of their own...



engagement of any of CAC's social posts to date reaching more than 350,000 impressions, with 36,000 likes, more

"Winter is over. The California avocados are here," said jan DeLyser, CAC vice president marketing. "CAC's topical themed social posts are examples of the opportunistic; fleet-of-foot marketing that keep California avocados top mind with our targeted consumers."

information. In annii, Shaw contributed to CAC thematic content called "Cook Like a Californian". Some of the

"California avocado harvesting is going strong with one week's volume this month reaching more than %1 million pounds, in time for the industry's ramp up leading into Cinco de Mayo." Said Detyser.

avocados through advertising, promotion and public relations, and engages in related industry activities. Califo avocados are cultivated with uncompromising dedication to quality and freshness, by more than 3,000 grovers in the Golden State. The California Avocado Commission serves as the official information source for California Facebook.com/CaliforniaAvocados and iBICA Avocados on Twitter. Pinterest and Instagram for updates









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RESEARCH

FOODSERVICE - CHAIN PROMOTION COVERAGE THROUGH OCTOBER

2019 Branded Chain Promotions: 7







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RESEARCH

FOODSERVICE CHAIN PROMOTIONS

Xperience Restaurant Group - March 3 - April 21





31 units (CA)



4 units (CA)









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FOODSERVICE CHAIN PROMOTIONS



77 units (CA, OR, AZ) March 4 – June 16





43 units (CA, AZ, NV, OR, WA, ID) April 22 – September 1





51 units (CA, UT, NV) March 21 – June 12





420 units (CA, NV) April 8 - August 18





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RESEARCH

FOODSERVICE - ONSITE MENU IDEATION SESSIONS























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RESEARCH

FOODSERVICE - PRINT ADVERTISING

- Three print ads running in Restaurant Business, FoodService Director and Plate
- 4 placements resulting in almost 191,311 impressions

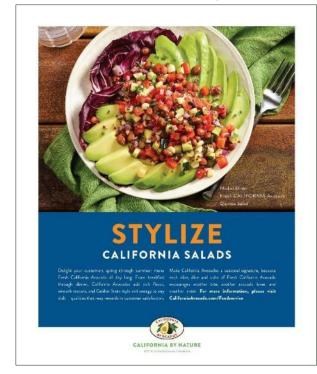


Plate: Mar/Apr Restaurant Business: Feb Nickel Diner – Los Angeles, CA

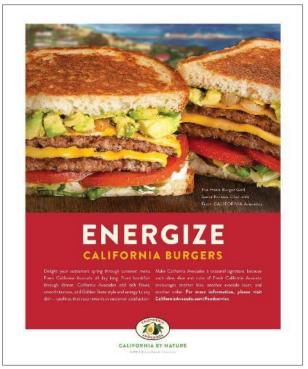
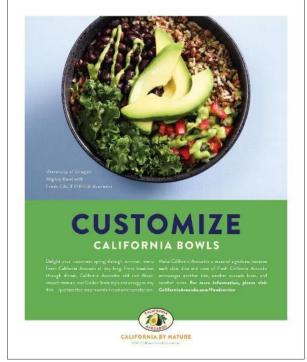


Plate: Jan/Feb The Habit Burger Grill



FoodService Director: March University of Oregon





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FOODSERVICE - DIGITAL ADVERTISING

Recipe Watch

- 3x: Feb April insertions
- 269,085 impressions
- 555 clicks





Food News Media's 5 Recipes

- 2x: Feb & April insertions
- 43,003 impressions
- 220 clicks





RB Daily

- 2x: March April insertions
- 192,336 impressions
- 85 clicks

RESTAURANT







FEATURED RECIPE

California Avocado & Crab Toast

Since Avocado Toest evolved from a local treat into a menu standard, chefs have created a myriad of variations on the theme. Pairing crab with Fresh California Avocados has proved a popular combination. Count on California grovers to deliver the best quality fruit for spring and summer menus.

Sponsored By







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Search Catersource

FOODSERVICE - PUBLIC RELATIONS

National Culinary Review's The Culinary Insider













California avocado relish with tuna crudo (a knockout!] wow)



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FOODSERVICE - EVENTS

Chain Gang Meeting (February 5)















CONSUMER ADVERTISING









RESEARCH

CONSUMER RESEARCH: 2019 CALIFORNIA AVOCADO TRACKING STUDY

- <u>Study summary</u>: an online survey of avocado purchasers to measure brand and competitive awareness plus consumer attitudes
- Previously an annual study, now biannual
- This year the survey questionnaire was trimmed for efficiency
- Study results are used to hone marketing messages to consumers and the trade
- Research will be fielded in early July with results by October