

# State of the Avocado Category Report

The State of the Avocado Category report, which uses IRI FreshLook data, provides an overview of long-term dollar sales and volume sales at retail for the total U.S. and the California region for the years 2017 through 2020. It also includes an overview of all the regions in the country. The study then provides a deep dive into the avocado category with particular attention paid to the retail sales in California, including bagged vs. bulk avocados, organic vs. conventional avocados as well as sales per week and average retail price. It concludes with sections that delve into the positive impact of the California season on retail sales and overall development of the category in both California and Western markets (where California avocados are primarily sold and marketed). While the report mostly focuses on the state of California and key markets in the Western United States, it also shows some national trends that can be used as a comparison.

Key findings of the State of the Category report include:

- In California, the California season averages over \$5.2 million more sales per week than the non-California season and the gap is widening
- In 2020, the California season lifted average weekly dollar sales by 33% and units by 23%
- California sales velocity is increasing at twice the rate of the rest of the U.S. (+103.1% vs. +47.9%, respectively)
- California bagged avocado sales velocity (\$2,352/million All Commodity Volume) was nearly twice as high as the rest of the U.S. (\$1,202/million ACV)
- In California, the average retail selling price was 8% higher during the California season
- Over the past four years, the average retail price of organic and conventional avocados in California has been consistently higher than the average price in the rest of the nation

## CALIFORNIA REGION AVOCADO CATEGORY NEARING RETAIL SALES OF FIVE HUNDRED MILLION DOLLARS

In 2020, California region avocado sales reached nearly \$500 million and surpassed 400 million units, up 27% and 38% vs. 2017, respectively.



Source: IRI/FreshLook

In 2020, California shoppers purchased more than 400 million avocados, which resulted in nearly half a billion dollars in retail sales. Over 62% of avocado sales growth occurred during the California season.

“This report is thick with enlightening and actionable information that will allow us to further improve our marketing programs,” said Jan DeLyser, California Avocado Commission vice president marketing. “It also provides data-driven results that demonstrate the strength and results of the California avocado program.”

The State of the Avocado Category report was developed as a part of the California Avocado Commission’s Tiered-Account program. It includes detailed information and data that provides staff and agencies a more robust understanding of the avocado category and the importance of the state of California and Western markets where California avocado distribution is the highest. These findings help to form insights that drive the development of the Commission’s marketing programs and approach as well as to provide “data nuggets” that CAC retail marketing directors can share with



## THE CALIFORNIA SEASON DRIVES HIGHER PRICES AS VOLUME AND DOLLAR SALES INCREASE

The California Season is defined by greater volume, greater dollar sales and an increase in ASP vs. the Non-California Season. In 2020, ASP increased by 7.7%, which generated 9 cents more per unit than the Non-California Season.



Source: IRI/FreshLook

*In California, during the 2020 California season, shoppers purchased more avocados, more often and were willing to pay a higher price (9 cents more per avocado than during the non-California season).*

retail partners to grow the sales of California avocados.

Using this information and insights from the report to improve marketing programs ultimately helps build demand for California avocados, which in turn can assist growers by increasing the velocity of sales and bolstering FOB prices.

The report also includes information that will be utilized in the development of trade press releases, articles and marketing materials, furthering the Commission's position as the industry leader. 🍷

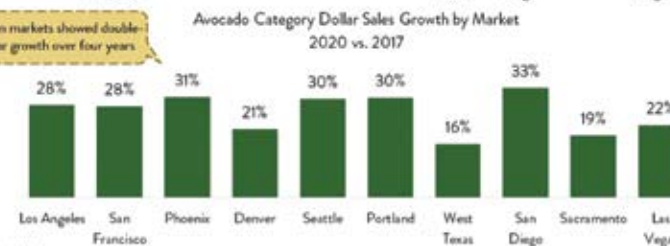


## L.A. AVOCADO SALES ARE MORE THAN TWICE THAT OF THE SECOND LARGEST WESTERN MARKET

Los Angeles recorded \$216 million in avocado sales during 2020 and was one of the fastest growing Western markets (+28%). All Western markets showed double-digit growth vs. 2017.



All Western markets showed double-digit dollar growth over four years



Source: IRI/FreshLook

*All Western markets grew by double digits in 2020. Los Angeles retail sales hit \$216 million. This represents growth of 28% in the market that is 2.7 times bigger than the next largest market.*