



Retail Channel Overview

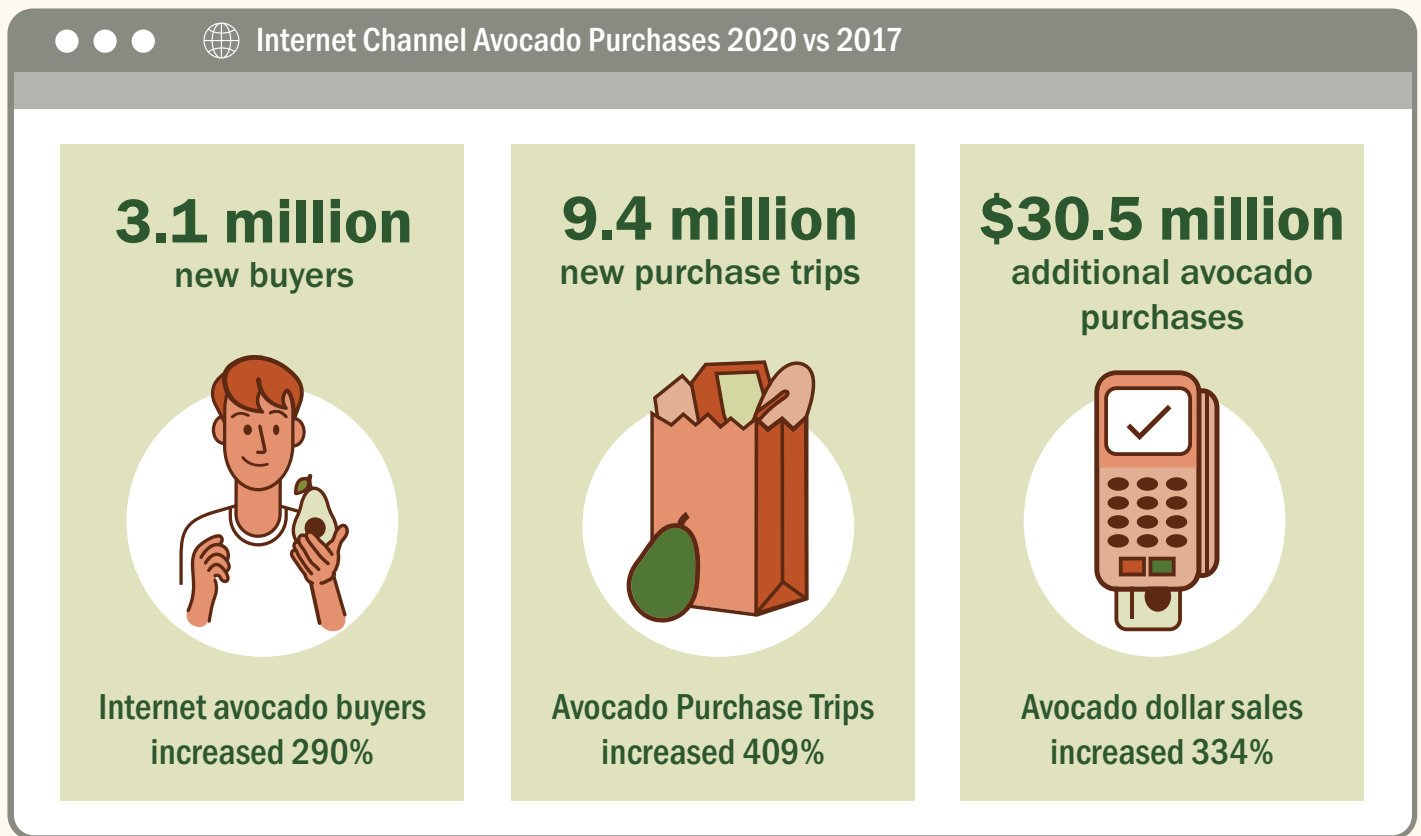
Understanding Avocado Category Purchase Trends
by Channel to Drive Retail Sales of Hass Avocados

ACTION GUIDE





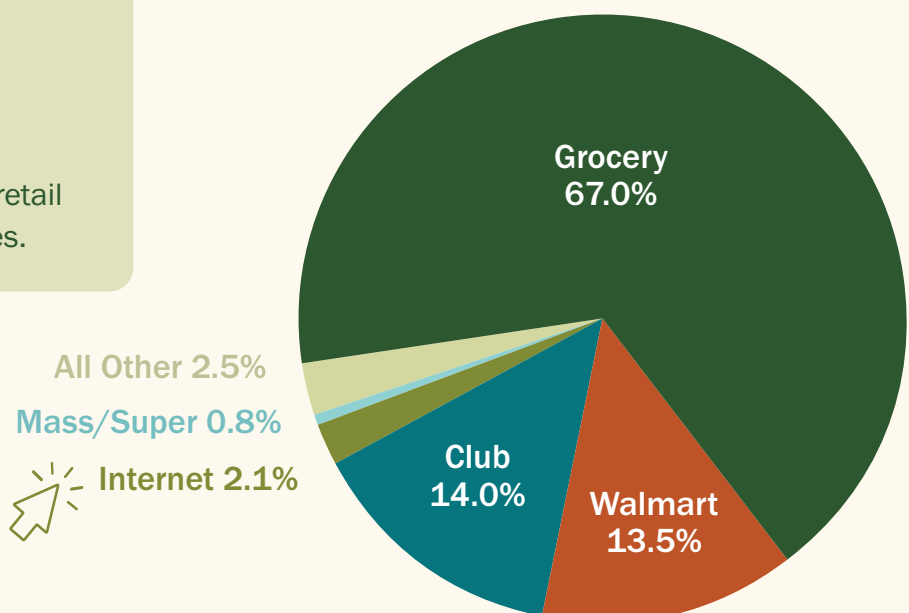
A Growing Number of Online Avocado Shoppers Are Purchasing More Avocados with Increased Frequency and Higher Spend



Internet Dollar Share has Quadrupled since 2017

In 2020, the Internet channel surpassed the Mass/Super channel as the fourth largest retail channel for avocado purchases.

2020 Avocado Dollar Share by Channel





Consider Additional High-Growth Channels as an Opportunity to Drive Greater Engagement with Ultra Shoppers, Who Represent the Largest Share of Avocado Dollars Across All Channels

2020 Avocado Dollar Share by Channel

Grocery	Walmart	Club	Internet	Mass / Super	All Other Outlets
Ultra 35.4%	Ultra 28.5%	Ultra 43.6%	Ultra 33.7%	Ultra 29.8%	Ultra 29.8%
Mega 17.9%	Mega 16.6%		Mega 19.5%	Mega 15.1%	Mega 18.0%
Super 12.6%	Super 12.3%	Mega 17.4%	Super 13.9%	Super 13.3%	Super 12.1%
Heavy 22.0%	Heavy 24.8%	Super 12.3%	Heavy 20.6%	Heavy 25.7%	Heavy 22.9%
Moderate 12.1%	Moderate 17.7%	Heavy 18.8%	Moderate 12.2%	Moderate 16.1%	Moderate 17.2%
		Moderate 7.9%			



2020 Avocado Dollar Growth by Channel

Highest Growth Channels

	Grocery	Walmart	Club	Internet	Mass / Super	All Other Outlets
Ultra	- 0.3%	+ 3.5%	+ 35.9%	+ 324.0%	- 24.4%	+ 6.1%
Mega	+ 1.5%	+ 23.8%	+ 12.3%	+ 458.1%	- 41.8%	+ 6.2%
Super	+ 7.4%	+ 21.5%	+ 50.9%	+ 397.6%	- 4.4%	+ 14.9%
Heavy	+ 6.0%	+ 23.3%	+ 18.0%	+ 240.2%	+ 16.9%	+ 10.6%
Moderate	- 6.1%	+ 22.9%	+ 3.8%	+ 343.5%	- 1.0%	+ 1.0%

Segment share of avocado purchasing households: Ultra= 8.3%; Mega= 8.3%; Super= 8.3%; Heavy= 25.1%; Moderate= 49.9%