

2022 Regional Retail Avocado Category Development Drivers

California and the West Region Study Highlights

In late 2022, the Hass Avocado Board conducted an in-depth analysis of retail avocado category data from calendar year 2021, the last full year of data that was available at the time. This information was compared to data from calendar year 2018 to understand changes over time. The Regional Retail Category Development Drivers report is the most current avocado category study that provides regional category development data as well as detailed consumer demographic information.

Below are key learnings from the study, focusing on California and the West region. The analysis demonstrates strong avocado category development in California and the West, confirming the value of decades of marketing by the California Avocado Commission and other organizations. Note, the information provided below is for all avocados sold at retail in the U.S. regardless of origin; when California is mentioned in this article it refers to the region of California and sales of any avocado, not only California avocados.

Key Research Learnings

The avocado category continues to be highly developed in the West and California, the two regions where much of the California avocado crop is distributed. A Category Development Index measures each region's share of total U.S. avocado volume compared to its share of the total U.S. population. The West Category Development Index is 154, the highest in the country. The California CDI is 127, the second highest in the country. The region that had the strongest CDI growth was the Southeast.

Between 2018 and 2021 the retail avocado category grew by an incremental \$435 million, which was an increase of 17.7%. The California region saw a 32% increase in avocado dollar sales over the 3-year period, which accounted for nearly one-third of total U.S. incremental dollar sales. The average amount that avocado shoppers spent on avocados per shopping trip increased 5% since 2018 in the total U.S.; the California region led this growth with the highest average dol-



lar sales per trip as well as the strongest growth, up 20.8%.

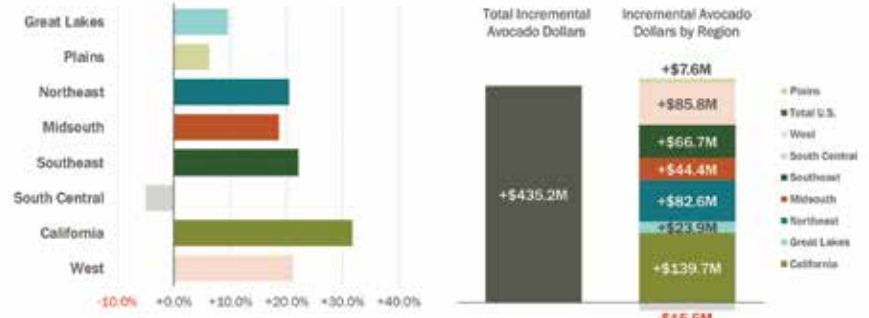
The California and West regions exceeded the total U.S. and all other regions on other category purchase dynamics measures, including household penetration, average annual purchases per household, annual number of shopping trips when avocados were purchased and percent of repeat buyers.

An important overall conclusion of the study is that the avocado category in the United States has room for growth and opportunities exist to use different strategies in different regions.

The research also provides data about consumer demographics, market basket value, avocado shopper segmentation, regional profiles and purchase trends for the total U.S. and by region. With this information the California Avocado Commission and other associations can develop a deeper understanding of category dynamics and shopper purchase behaviors. Ultimately, understanding shopper purchasing helps uncover opportunities for growth and aids in effective sales and marketing. 🍷

Data source: IRI Consumer Network™ (now known as Circana), reported by the Hass Avocado Board.

Avocado Dollar Growth % Change and Incremental Sales 2021 vs. 2018



Average Avocado Dollars per Trip in 2021



Regional Avocado Purchase Trends

	Total U.S.	West	California	South Central	Southeast	Midsouth	Northeast	Plains	Great Lakes
CDI:	154	127	113	101	86	80	74	70	
Household Penetration	57.9%	71.8%	73.8%	63.0%	54.1%	49.2%	52.7%	52.3%	50.2%
Average Annual Spend per Household	\$39.63	\$47.79	\$58.41	\$30.79	\$38.10	\$36.00	\$41.92	\$28.36	\$28.90
Annual Purchase Trips	13.2	15.5	15.8	11.0	14.2	12.4	13.3	11.2	10.9
Spend per Trip	\$3.01	\$3.08	\$3.69	\$2.81	\$2.69	\$2.90	\$3.15	\$2.53	\$2.66
Repeat Buyers	82.9%	86.7%	87.2%	83.4%	82.5%	80.5%	81.7%	80.6%	80.1%

■ Above Total U.S. Average ■ Below Total U.S. Average