WHAT'S INSIDE A **CALIFORNIA AVOCADO**

FY26 Dashboard Performance Report

October 28, 2026





PROGRAM OVERVIEW

Objectives, audience, key Performance indicators and revenue

Marketing Objectives



Objectives

- Achieve a premium average price per pound that meets or exceeds the four-year historical F.O.B. price differential between California Avocados and imports
- Build and sustain trade commitments (retail and foodservice) that support California Avocado volume, timing and market priorities
- Maintain or increase preference and perceived value with targeted consumers



Strategies

- Utilize data and strategic insights to shape trade and consumer targeting and programs
- Develop trade and consumer communications that differentiate California Avocados and create demand leading up to and throughout the season
- Create collaborative trade programs that reach avocado shoppers and patrons

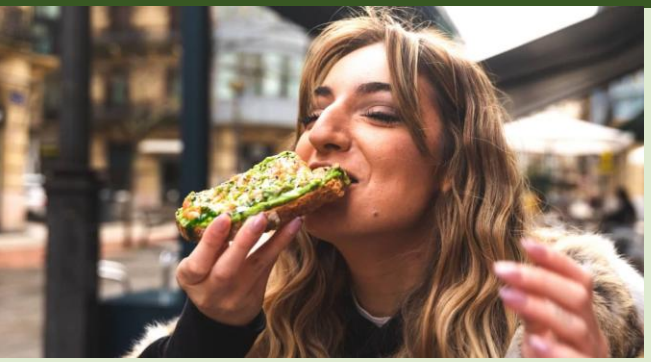
Target Audience

Ultra and Mega buyers, who are responsible for 35% and 18% of avocado purchase dollars, respectively



PRIMARY

- Age range: 25-44 (primarily Millennials)
- 55% have children in the home, 36% serve avocados to children as well as adults
- $89K+ average household income
- 51% college educated, 30% associate degree
- Located in the Western Region: California, Oregon, Washington, Arizona, Utah, Colorado
- 76% are interested in "healthy living"



SECONDARY

- Younger Gen Z (18-24) *(any race/ethnicity, ultra/mega buyers)*
- Elder Gen X (55-60) *(any race/ethnicity, ultra/mega buyers)*
- Spanish-language speakers *(any age, ultra/mega buyers)*
- Expanded geographical regions *(dependent on availability)*

Key Performance Indicators

$1.06

Average Selling Price*

Category Average Selling Price per Unit for the 4-weeks ending October 4, 2026

258.4 Million

Consumer Media Impressions

Includes offline, online and social media impressions through September 2026

197.9 Million

Consumer PR Impressions

Media coverage impressions secured with print, broadcast, online media outlets and influencer channels through September 2026

22.8 Million

Trade Media and Public Relations Impressions

Positive direct CAC trade media and public relations circulation through September 2026

6.63

Return on Ad Spend

In pilot partnership with Instacart, which drove $329K in attributed sales on $49.6K spend, with new-to-brand shoppers at 11x ROAS

1.33 Million

Custom CALIFORNIA AVOCADO bag straps distributed

Retail Sales & Volume

RETAIL (4 weeks)	Sep25 (9/8/25 - 10/5/25)	Sep26 (9/7/26 - 10/4/2026)	Variance
Avg. Volume (Units) / Week	56,648,820	58,868,303	+3.9%
Avg. Dollars / Week	$63,253,072	$62,428,051	-1.3%
Avg. Selling Price/Unit	$1.12	$1.06	-5.0%
RETAIL California Season	**Mar25-Aug25 (3/9/25 - 9/28/25) 30 weeks**	**Mar26-Sep26 (3/8/26 - 9/27/26) 30 weeks**	**Variance**
Avg. Volume (Units) / Week	58,916,065	65,282,417	+10.8%
Avg. Dollars / Week	$73,337,044	$69,349,562	-5.4%
Avg. Selling Price/Unit	$1.24	$1.06	-14.7%
RETAIL Non-California Season	**Sep24-Feb25 (9/8/24 - 3/2/25) 26 weeks**	**Sep25-Feb26 (10/5/25 - 3/1/26) 22 weeks**	**Variance**
Avg. Volume (Units) / Week	54,536,716	62,349,011	+14.3%
Avg. Dollars / Week	$68,840,414	$61,681,700	-10.4%
Avg. Selling Price/Unit	$1.26	$0.99	-21.6%

Source: Circana, Total U.S. MULO+, 4 weeks ending 10-04-26 vs. prior year; 2026 CA Season vs. prior year; 2026 Non-CA Season vs. prior year

Retail Price

Avg. Retail Price $1.24	Avg. Retail Price $0.99	Avg. Retail Price $1.06
2025 California Season	2026 Non-Season	2026 California Season
Mar 2025 – Aug 2025 (3/9/25 - 9/28/25) 30 weeks	Sep 2025 – Feb 2026 (10/5/25 - 3/1/26) 22 weeks	Mar 2026 – Sep 2026 (3/8/26 - 9/27/26) 30 weeks

Source: Circana, Total U.S. MULO+, 2025 CA Season; 2026 Non-CA Season; 2026 CA Season

Revenue: Crop Movement & Measures

California Avocado Grade and Size Distribution - This Year vs. Last Year									
		November 1, 2025 - October 31, 2026				November 1, 2024 - October 31, 2025			
		Size %	(millions)		Avg Lug $	Size %	(millions)		Avg Lug $
Grade	Size		Pounds	Dollars			Pounds	Dollars	
Hass #1 Conv	40	9.6%	24.0	37.1	$ 38.71	6.3%	14.6	32.5	$ 55.67
	48	35.1%	87.6	139.8	$ 39.92	32.5%	75.4	174.6	$ 57.88
	60	25.5%	63.5	93.9	$ 37.00	25.4%	58.9	117.1	$ 49.71
	70	15.5%	38.5	49.5	$ 32.09	17.5%	40.6	62.4	$ 38.41
	84	6.8%	16.8	20.0	$ 29.66	11.2%	25.9	30.5	$ 29.43
	Other	7.6%	19.0			7.2%	16.7		
	All	100%	249.3	366.5	$ 36.75	100%	232.1	447.5	$ 48.19
Hass #2s	All		34.2	38.9	$ 28.45		22.5	33.3	$ 36.97
Hass Organic #1	All		19.4	36.7	$ 47.28		19.7	49.2	$ 62.44

California Avocado Region Distribution - This Year vs. Last Year								
All Varieties	November 1, 2025 - October 31, 2026				November 1, 2024 - October 31, 2025			
		(millions)				(millions)		
Region	Region %	Pounds	Dollars	Avg Lug $	Region %	Pounds	Dollars	Avg Lug $
EAST CENTRAL	3.8%	12.4	20.2	$ 40.81	4.6%	12.6	25.9	$ 51.15
NORTHEAST	5.5%	18.1	28.2	$ 38.95	3.3%	9.1	19.4	$ 53.39
PACIFIC	76.0%	249.2	357.8	$ 35.90	76.6%	209.9	392.6	$ 46.76
SOUTHEAST	6.8%	22.3	35.1	$ 39.35	6.6%	18.0	38.0	$ 52.78
SOUTHWEST	2.6%	8.6	12.6	$ 36.60	2.4%	6.7	12.8	$ 47.61
WEST CENTRAL	4.6%	15.1	23.1	$ 38.22	6.2%	16.9	36.4	$ 53.74
EXPORT	0.7%	2.2	3.5	$ 39.86	0.2%	0.7	1.5	$ 59.16

Revenue: Crop Movement & Measures

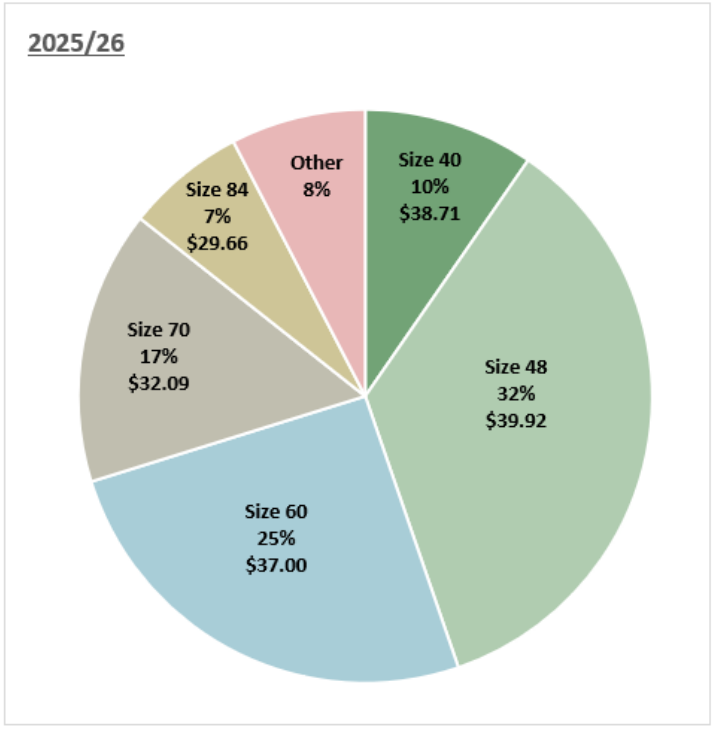
U.S. Hass Avocado Supply (November-October)			
	2025/26	2024/25	2023/24
Origin	Volume (MM lbs)	Volume (MM lbs)	Volume (MM lbs)
California	338	329	363
Chile	8	18	12
Colombia	17	137	59
Mexico	2,819	2,306	2,423
Peru	143	218	134
Total	**3,325**	**3,008**	**2,991**

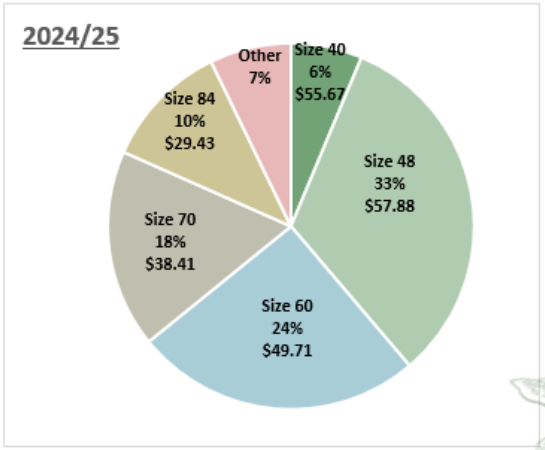


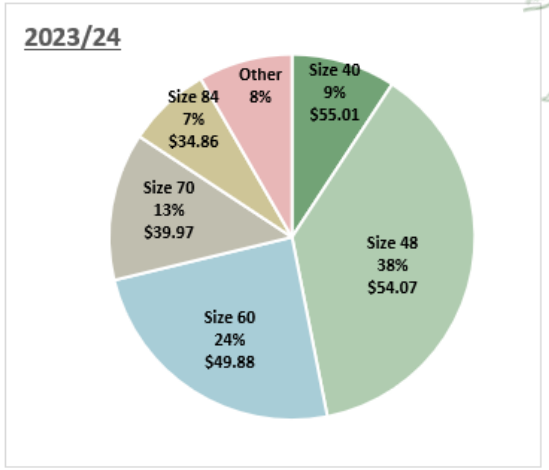
Revenue: Crop Movement & Measures

Size Distribution and Average Lug Price

Hass #1 Conventional (November-October)







Source: AMRIC



CONSUMER & RETAIL MARKETING HIGHLIGHTS

Creative, paid media, social media, website, email, search, brand PR, and events and influencer partnerships

FY26 Executive Summary



218.4M
PAID MEDIA IMPRESSIONS
FY25: 253M

40M
SOCIAL MEDIA IMPRESSIONS
FY25: 109M

11M
SOCIAL MEDIA VIDEO VIEWS
FY25: 28.9M



8.5M
PAID MEDIA CLICKS/ ENGAGEMENTS
FY25: 16M

8.2M
SOCIAL MEDIA CLICKS/ ENGAGEMENTS
FY25: 9.3M



2.3M
WEBSITE PAGEVIEWS
FY25: 2.1M

20.2%
ENGAGEMENT RATE
FY25: 26.2%



986K
EMAILS DELIVERED
FY25: 1.05M

2,013
NEW EMAIL SUBSCRIBERS
FY25: 1,573

19.8%
OPEN RATE
FY25: 21.2%

1.2%
CLICK RATE
FY25: 1.2%



190.4M
EARNED MEDIA IMPRESSIONS
FY25: 177M

7.5M
CONSUMER INFLUENCER IMPRESSIONS
FY25: 3.6M

Total budget: $3.87M

Consumer & Retail Marketing Results

Tactic	2024-25 Budget	2025-26 Budget	% Change	2024-25 Impressions	2025-26 Benchmark Impressions	% Change	2025-26 Achieved Impressions	Tracking to Benchmark
AUDIO	$150,000	$0	-100%	12,751,493	N/A	N/A	N/A	N/A
OOH	$150,000	$125,000	-17%	16,170,058	17,076,503	+6%	13,691,860	-20%
DIGITAL	$1,140,000	$650,000	-42%	137,982,482	88,448,520	-36%	87,731,941	-1%
VIDEO	$950,000	$915,000	-3%	78,616,088	58,315,901	-26%	112,566,274	+93%
SEARCH	$100,000	$30,000	-70%	8,176,805	2,413,515	-70%	4,394,490	+82%
SOCIAL	$625,500	$500,000	-20%	109,719,383	21,588,212	+17%	39,496,575	+82%
PR & EVENTS	$752,000	$356,000	-53%	177,000,000	125,000,000	-29%	190,445,226	+52%
CONSUMER INFLUENCER	$141,000	$175,000	+24%	3,600,000	2,200,000	-30%	7,514,718	+241%
WEBSITE	$83,600	$83,600	0%	2,082,605	2,000,000	+4%	2,309,963	+15%
EMAIL	$77,500	$75,000	-3%	1,049,196	750,000	+39%	986,038	+31%
TOTAL	**$4,169,600**	**$2,909,600**	**-30%**	**546,235,616**	**317,792,651**	**-41%**	**459,137,085**	**+44%**

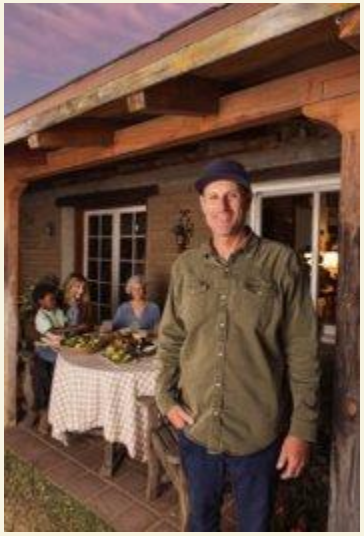
*All metrics fiscal 2025-26 through September 30, 2026; paid media includes consumer and retail paid media program metrics

Highlights: Creative











Approach

- Developed *Voice of the Grower* campaign, featuring real growers as approachable, trusted storytellers, bringing authenticity and a stronger emotional connection to consumers
- Highlighted California Avocados as locally and responsibly grown by farmers who care, reinforcing their premium difference
- Total budget: $320K (Consumer $250K, Retail $70K)

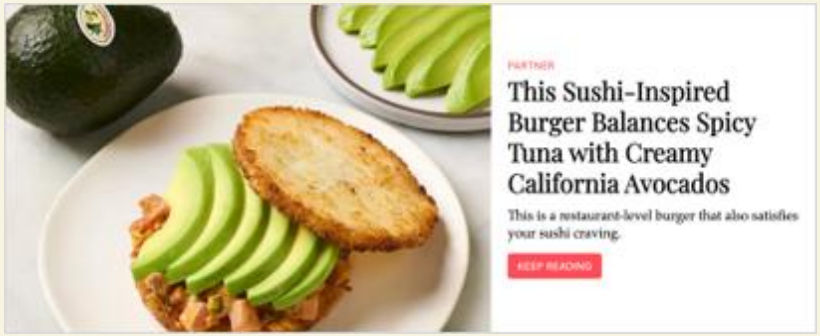
Results

- Strengthened California Avocado differentiation through authentic grower storytelling and a focus on care and quality
- **California Avocados continue to be described as worth paying more for,** with 61% respondents agreeing they are worth paying more for, on par with 2025
- **California remained the preferred growing region for avocados among Californians**, but fell slightly behind 2025 levels (54% in 2026 vs. 61% in 2025)

Optimizations

- Expand to always-on, grower-driven content across social and blog, including behind-the-scenes stories, occasions and use cases
- Evolve *Voice of the Grower* for seamless integration with future activations tied to California's 2027 Super Bowl and 2028 Olympics opportunities

Highlights: Paid Media







Approach

- Promote the *Voice of the Grower* campaign through a mix of channels reaching consumers and shoppers at every stage of the funnel across consumer and retail channels
- Total budget: $1.753M (Consumer $1.378M, Retail $375K)

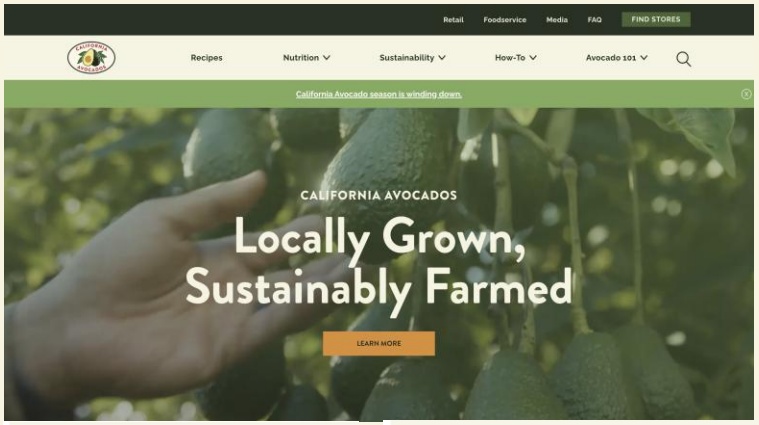
Results

- **High-impact video and custom content beat benchmarks all season.** LoopMe CTV reached a 98.9% completion rate (vs. a 90% benchmark) and drove a **10% lift in purchase consideration** (85K+ people), while both The Kitchn custom recipes topped their 40K page-view benchmark
- **Retail media proved it drives sales.** Instacart, a new partner this year, delivered a 6.63x ROAS ($329K in attributed sales on $49.6K spend), and new-to-brand shoppers hit 11x. It's the only tactic in the program with direct sales reporting

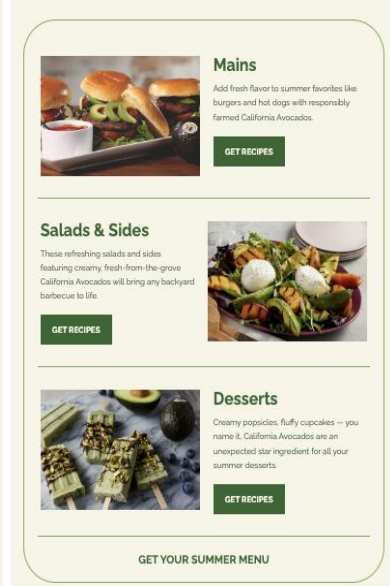
Optimizations

- **Moving YouTube and paid search to managed partners** in FY27 for more hands-on optimization and stronger performance
- **Consolidating to fewer, higher-impact partners** and prioritizing those that offer brand lift and sales studies, so we can measure the campaign's impact on consideration and purchase, not just media metrics

Highlights: Web, Email & Search







*All metrics fiscal 2025-26 through September 30, 2026

Approach

- Leverage digital channels (email, website and search) to educate, inspire and drive conversion through the Store Locator
- Total budget: $188,600 (Website $83,600; Enewsletter $75K, Search $30K)

Results

CONSUMER WEBSITE

- Sessions: 2.0M (21.5% increase YOY)
- Pageviews: 2.3M (10.9% increase YOY)
- Engagement rate: 20.2% (22.9% decrease YOY)
- Top landing page by sessions was Store Locator: 768.5K (154.2% increase YoY)
- Instagram was the top traffic source for website sessions, driving 449.5K sessions (397.1% increase YoY)

ENEWSLETTER

- Subscribers: 160,252 (increase of 2,013 subscribers since Nov. 2025)
- Emails Delivered: 986,038 (6.0% decrease YOY)
- Average Open Rate: 19.8% (6.6% decrease YOY)
- Click-Through Rate: 1.22% (0.8% decrease YOY)

SEARCH

- Organic Search Sessions: 428,083 (21.5% of traffic, 51.5% increase)
- Paid Search Sessions: 234,734 (11.8% of traffic, 50.8% increase)
- "Avocado nutrition facts" had 415,381 impressions (118.5% increase YoY) and 20K clicks (281.1% increase YoY)

Optimizations

- **Website:** Conduct website audit, implement page updates as needed in 2027
- **Email:** Refine A/B testing, evolve and refresh our audience segments; send a "Do You Still Want to Hear From Us?" email to unengaged Two Star segment in 2027
- **Search**: Lean into content relating to the topics consumers are curious about, using language they are actively searching

Highlights: Social Media





Approach

- Drive engagement, consideration, loyalty and awareness through social media content, advertising and engagement with target audiences
- **Total budget:** $500K total; $220,500 paid spend

Results

- **Drove more action across channels:** Engagements and clicks grew nearly 70% to 8.2M, with 44% less spend than last year
- **Grew a loyal, engaged community:** We added nearly 3,000 net new followers, up 11.6% over last year, led by strong growth on Instagram

Optimizations

- **Prioritize high-growth channels:** Focus investment and content on Instagram and TikTok, where our audiences are growing and engaging the most
- **Lean into local, everyday moments:** Create more lifestyle content that highlights California Avocados' local roots and mirrors how California Avocados show up in consumers' everyday lives

Highlights: PR & Retailer Events





Approach	☐ **PR**: Drive awareness and demand for California Avocados during the 2026 season through media outreach, TV Spokesperson segments and the distribution of a MAT release ☐ **Retailer Events**: Strengthen CAC's connection to key retail partners and drive consumer awareness of California Avocado availability in-store through local influencer retail events and a grove tour ☐ **Total budget**: $356,000 (Media Relations: $171,000, Retail Activations: $185,000)
Results	• Generated **190.4M on-strategy media impressions** — exceeding KPIs by 83.65% — with **50.5M** coming from TV Spokesperson segments and **38.3M** from the MAT release • Achieved **1.5M impressions** and **14.4k interactions** across retail influencer events from the Ventura Grove Tour and retail partnerships with Sprouts Farmer's Market, Stater Bros. Markets and Erewhon
Optimizations	• Expand the mix of dedicated segments and round-up opportunities as well as expertise of spokespeople to maximize both message depth and scale • Reserve budget flexibility for timely in-season segment opportunities • Further explore types of content creation from firsthand experiences at future grove tours to deliver credible, seasonal storytelling

Highlights: Consumer Influencer





Approach

- Collaborate with 7 highly curated influencers to deliver aspirational, crave-worthy content across three high-impact points, fueling seasonal buzz, purchase intent and long-term brand affinity
- **Total budget**: $175,000

Results

- Reached **7.5M impressions**, exceeding our impressions goal by nearly 250% as well as maintained an average **engagement range of 2.42%** (against our goal of 1-3%)
- Achieved **237K interactions** across **26 deliverables** and **positive consumer sentiment** as indicated through audience comments

Optimizations

- Engage mid-tier to macro-level influencers when awareness is the primary objective and smaller, niche creators when engagement is priority
- Explore a curated group of influencers to create a steady stream of content throughout the season, helping build familiarity and credibility of the brand



TRADE PR

Trade industry media coverage and press releases

Trade PR Executive Summary

257

Total Story Placements

22.8 Million

Total Story Impressions

Proactive Outreach
Timely press releases covering crop forecast, board leadership, marketing launch, California Avocado Month, retailer activations and TRQ efforts, etc.

Responsive Interviews
Served as reliable, go-to source for both California Avocado feature stories and category/industry coverage

Trade PR Highlights


California Avocado Commission Seats New Board of Directors


California Avocado Commission Unveils New Advocacy Video Supporting Seasonal Tariff Rate Quota Proposal

Effort Amplifies California Avocado Growers' Priorities During the USMCA Review and Calls for Policies That Strengthen Domestic Agricultural Sustainability


PRODUCE NEWS

California Avocado Month highlighted through peak season marketing efforts


the SNACK

CALIFORNIA AVOCADOS

1 billion avocados

8.1 points

77%

83%

330 million pounds

$3 billion

$2 premium

73%

79%

94%


THE PACKER

How Digital Tools and Authentic Stories Drive Spring Marketing Efforts

Approach

- Combined proactive releases with responsive interviews to garner stories with top produce and grocery trade outlets that would reach key retail decision makers

Results

- Comprehensive coverage secured across key produce and retail trade outlets.
- Feature stories covered topics such California avocado crop size, retail marketing efforts, TRQ advocacy and
- Generated **257 stories**, resulting in more than 22 **million media impressions**

Optimizations

- Prioritize outreach around key retail planning windows, develop more in-depth features on retailer programs and industry health, and use coverage insights to refine topics and target outlets.



RETAIL PARTNERSHIPS

Retail activations, partnerships and retailer support

Key Performance Indicators
Retail – Western Region

76%
More Retail Activations in 2026 than 2025

CA Peak Months

Activations

May = 16 / June = 28

July = 31 / August = 24

September = 15

9.2 Million

Retail Shopper Impressions

Retailer's Shopper Marketing Campaigns

$918,000

Attributed Sales

Retail Shopper Marketing Campaigns

196 Audits

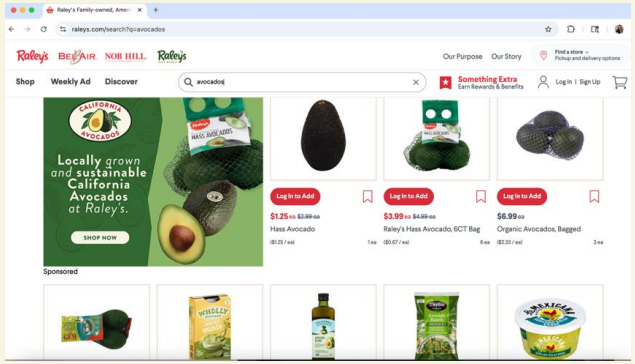
Store Audits SoCal & NorCal
Over 8 weeks Peak Season

79.3% Loyalty Rate

Expansion

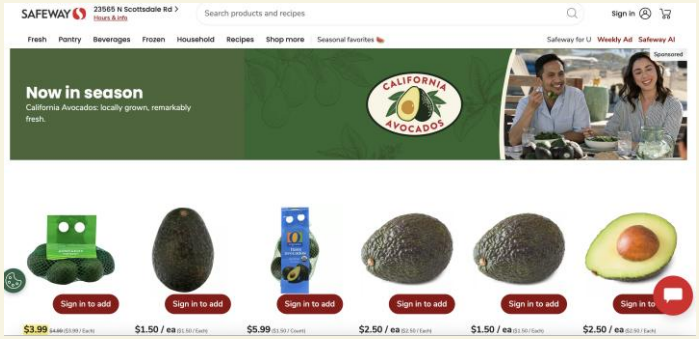
CALIFORNIA AVOCADOS in TX, OK, KS, CO, FL, SC, GUAM

Retail Highlights-
Shopper Marketing Campaigns









Approach

- Shopper Marketing Campaigns communicate brand messaging to shoppers and optimize online sales

Results

- 9.2 million impressions
- $918,000 attributed online sales

Optimizations

- California Avocados is a supportive digital partner to key retailers in California and western states
- Social media add-ons
- Complementary digital assets from the retailers programming

Retail Highlights –
Signs & Brand at Point of Purchase





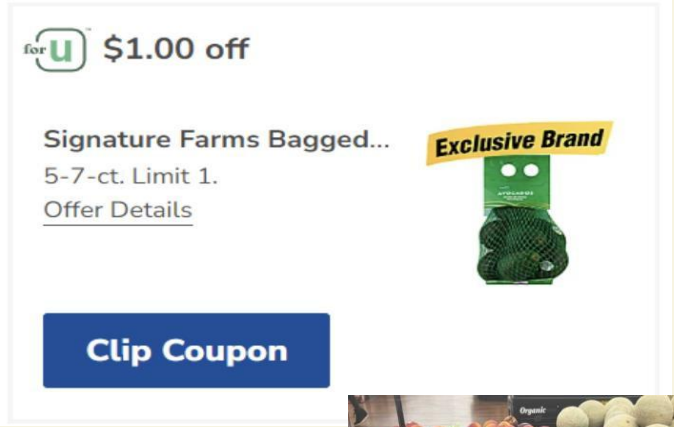






Approach	• Request and negotiate California Avocados at Point-of Purchase in Custom Signage
Results	• Six (6) Retailers participating
Optimizations	• Digital TV Screens at Retail • Check-stand dividers and cart signs

Retail Highlights – Albertsons/Vons SoCa







11X17" SINGLE SIDED - AVOCADOS

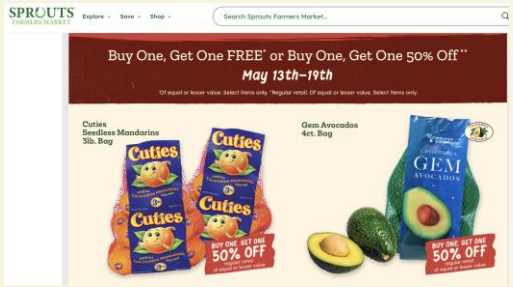




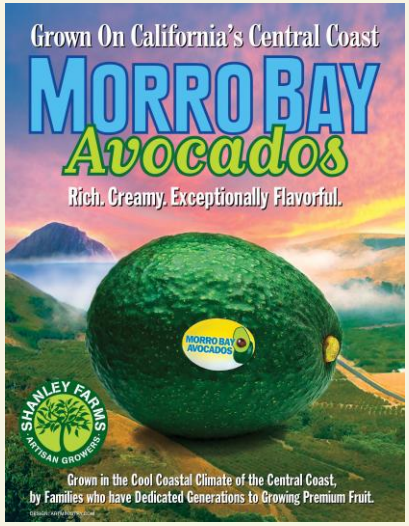
Approach	• Win back Southern California largest retailer to stay in California for the full season and no longer use Peru avocados • Plan activations per month for every month of the California season May - September
Results	• 2-3 Activations Per Month • Variety of activations to engage shoppers and optimize CAC funds
Optimizations	• Digital coupons • Higher level "Local California" message • Advertising California Avocados 2-3 times per month to continue driving sales

Retail Highlights - Sprouts











Approach	• Frequent activations season-long to drive sales • Negotiate additional regions for California Avocados
Results	• Demos, custom signs, digital coupons, bulk & bag promotions and late-season support • CA, AZ, CO, OK, KS and TX expansion
Optimizations	• Demos to support ads and displays in stores to engage shoppers for sales

Retail Highlights – Four Seasons



Approach	• Identified East Coast distributor with desire to invest in California Avocado programming • Strategized with customer and handler to create in store incentives for participating retailers
Results	• Four Seasons reported 4X California Avocado volume vs. any previous reporting period! • Established significant display and merchandising activity with leading edge retailers across the East coast • Developed the impetus for an ongoing GEM support program celebrating the most recent California Avocados varietal
Optimizations	• Promoting the connection to California with a 2027 Grove Tour celebrating and recognizing their best in class retailers from the 2026 season

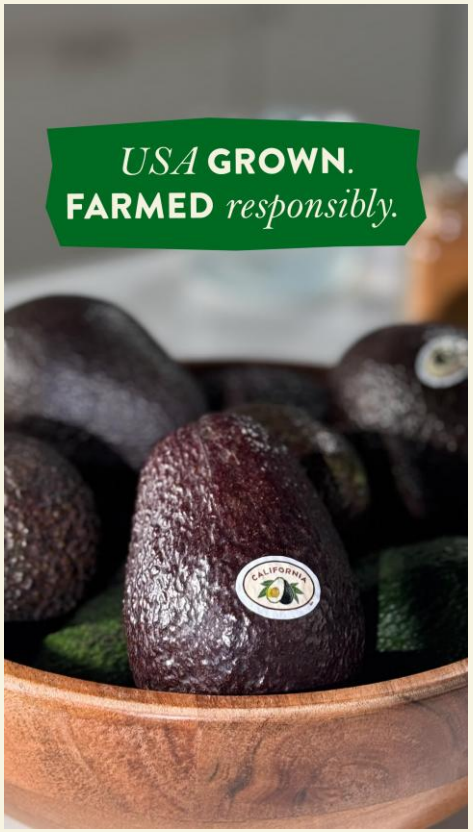
Retail Highlights - Wakefern



Approach	• Early season opportunity with NY Metro Market share leader • Identified interest in heavy early season promotion with CAC
Results	• Wakefern achieved $800,000 in retail sales exclusively against GEM variety (bags) • Internally identified commitment with $1,000,000 in retail sales on GEM for 2027 • Committed to extended program for 2027 inclusive of CA Hass crop
Optimizations	• Meeting with Wakefern digital marketing personnel late October 2026 • Identifying and optimizing on targeting capabilities for digital marketing efforts for 2027

Retail Highlights – Publix META





Approach	• Publix identifies continued desire despite freight and logistical costs to support California Avocados • CAC works thru a season-long plan involving multiple handlers
Results	• Publix reports positive results, albeit under margin compression • META targeting is focused singularly on the CAC digital marketing target audience
Optimizations	• Cause marketing event was also included this season. Evaluating the effectiveness of PRODUCE FOR KIDS vs. brand objectives • Retailer reports positive results and is evaluating 2027 season in late 2026 • Will be visiting with both Publix merchandising contacts as well as digital marketing contacts at Publix retailer marketing department in late 2026



RETAIL COMMUNICATIONS

Social, email, website, print and TV with retail partners

Executive Summary – Retail Communications

Giving retailers a compelling reason to talk about California Avocados

18.5M+ impressions
99+ placements across social, newsletters, web, print and TV

Consumer Insights Survey of 1,000 Western Region Avocado Shoppers gave retailers CAC-owned themes and supporting stats to build digital campaigns around

Social, Email, TV, Print and Web Campaigns with nine retail partners, including new 2025-26 partner Northwest Grocers

California Avocado Month Retail Social Media Co-Promotion with Gelson's, Avocado Green Mattress and dietitian Mascha Davis: 317K combined partner Instagram followers, 37K views and 5,800 comments

Retail Highlights

ALBERTSONS-VONS-PAVILIONS





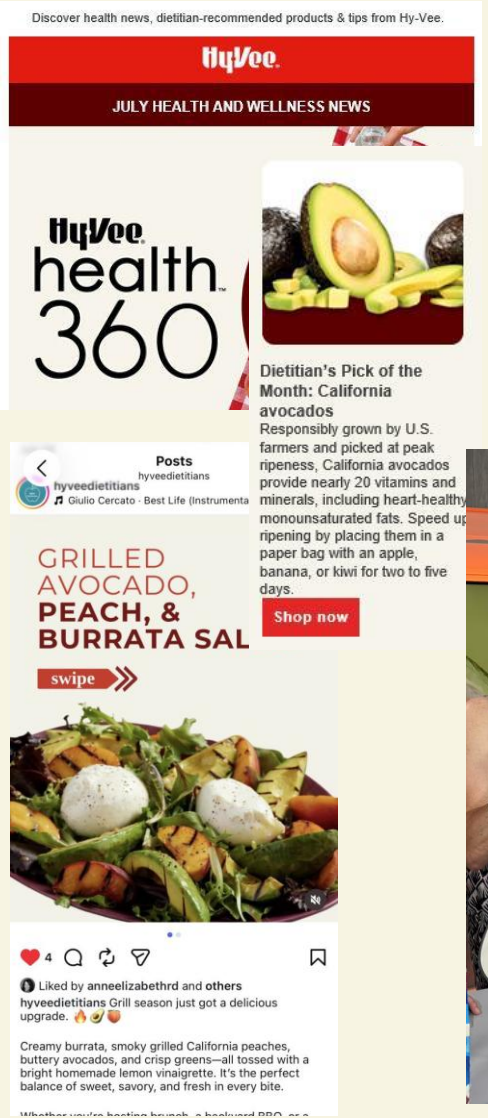




Approach	• 4-week social media campaign in support of California Avocado Month (June) • Weekly posts featuring CAC provided content, including: grower profile, how to videos (2) and recipe
Results	• Impressions: 1,394,783 • Views: 1,138,638
Optimizations	• Closer and more timely alignment with RMDs' promotional agreements to pitch and build campaigns accordingly • Provide RMDs with ideas to pitch ready-to-publish bylined blogs for retailer websites, attributed to retailer produce managers

Retail Highlights

HY-VEE DIETITIAN PICK OF THE MONTH



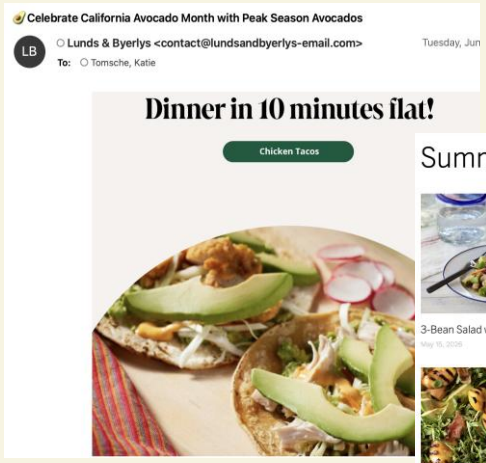


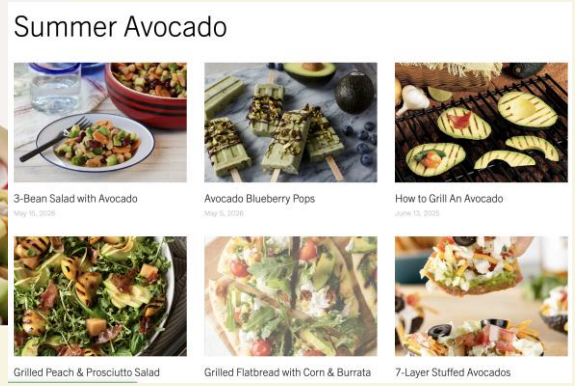


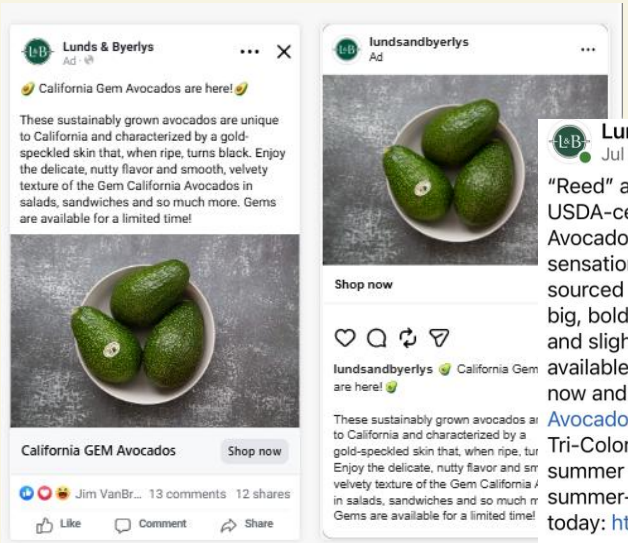
Approach	**Multi-touchpoint campaign throughout July** • Hy-Vee Health 360 and This Week at Hy-Vee newsletters • In-store signage • Social media posts • TV segments (3) and newspaper articles (5)
Results	**Print** • 13.7M reach • $126K ad value | $380K news value **TV (KCRG, Cedar Rapids)** • 421.5K reach • $3.9K ad value | $11.7K news value **Hy-Vee Newsletters** • Health 360: 400K circulation • This Week at Hy-Vee: 146K circulation
Optimizations	• Provide CAC boosting budget to secure social metrics report for month-long campaign

Retail Highlights

LUNDS & BYERLYS









Approach	• Good Taste Newsletter: Celebration of California Avocado Month with CAC-provided messaging and multiple recipes • Varietal Posts: Social media campaign featuring GEM Avocados (April 30-June 4) and Reed Avocados (July 3)
Results	• Good Taste Email: Circulation: 540K • Social Media - GEM: 117K
Optimizations	• Closer and more timely alignment with RMDs' promotional agreements to pitch and build campaigns accordingly • Provide RMDs with ideas to pitch ready-to-publish bylined blogs for retailer websites, attributed to retailer produce managers



RETAIL TRADE ADVERTISING

Retail trade advertising, communications and data-driven insights

Executive Summary – Retail Advertising

Combined trade advertising, retail communications and data-driven insights to reinforce the value of California Avocados and support retail planning and promotion.

PROGRAM HIGHLIGHTS

Trade Visibility: 216 advertising placements generating 6.8 million in print and digital circulation
Retail Engagement: Newsletters achieved a 28% average open rate and a 4.7% click rate
Actionable Insights: Developed customized scorecards, Annual Business Reviews (ABRs), retailer tools and performance reports to support retailer decision-making

PROGRAM SUCCESS

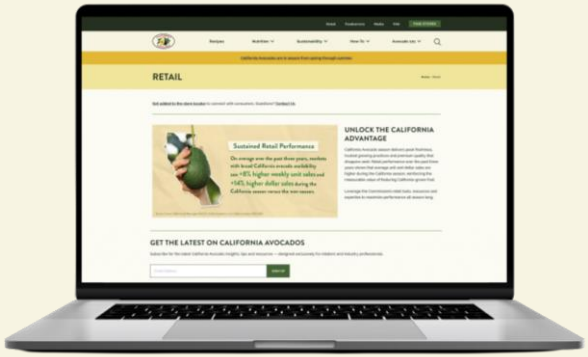
Strengthened retail communications and equipped retail partners with the information and resources needed to plan, merchandise and promote California Avocados.

Retail Highlights





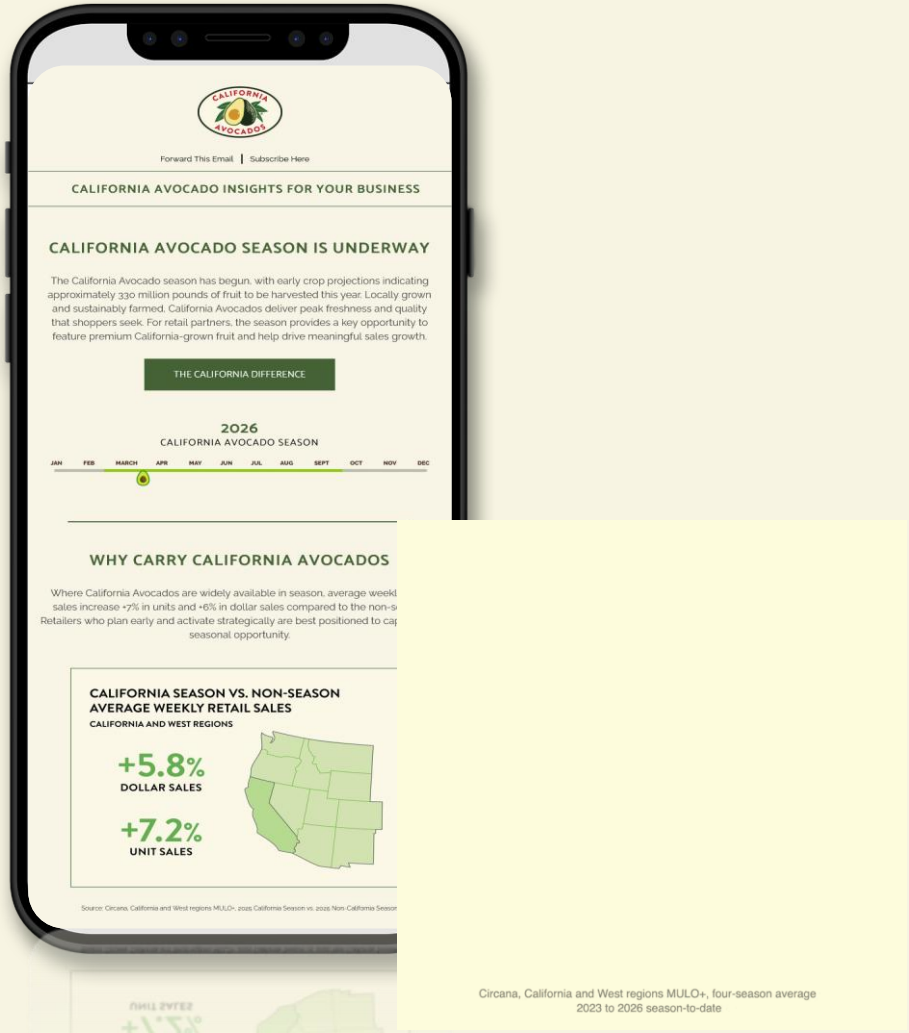




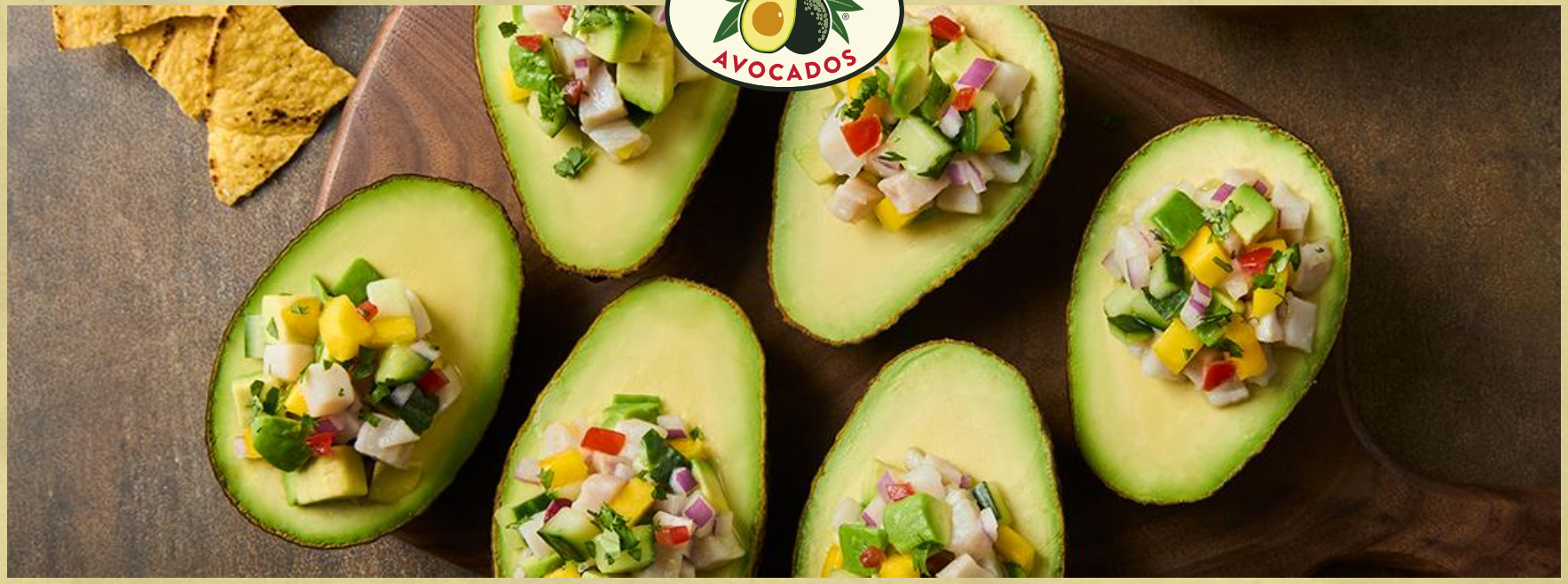


Approach	• Developed and executed *The California Advantage* campaign across produce and grocery trade publications, with print and digital placements from March through October • Total Advertising Spend: $110,000
Results	• Highlighted California Avocado retail value and seasonal sales opportunities driving traffic to the retail newsletter and webpage • Placements included The Packer, The Produce News, Produce Business, Perishable News, Fresh Plaza, Shelby Report, AndNowUKnow and Produce Reporter • Total Placements: 216 • Total Print and Digital Circulation: 6,800,000
Optimizations	• Align campaign flights with key seasonal retail planning periods and coordinate with trade media outreach. Evaluate performance by publication and creative format • Prioritize high-impact advertising placements during peak selling periods

Retail Highlights



Approach	• Delivered targeted retail-focused messaging to chains, independent retailers, handlers and distributors, featuring category insights, benefits of carrying California avocados and merchandising opportunities and resources
Results	• Retail newsletters maintained strong audience engagement in 2026 • Average Open Rate: 28.0%, up 2.2% YOY (27.4% in 2025) • Average Click Rate: 4.7%, down 35.6% YOY (7.3% in 2025) *Industry average rates- Open: 30.9% Clicks: 1.01%* *Based on Omeda, 2026 B2B newsletter benchmarks*
Optimizations	• The retail newsletter program has been discontinued



FOODSERVICE HIGHLIGHTS

Chain promotions, culinary training & education, foodservice media

Foodservice Executive Summary

13.3M
ANNUAL MEALS SERVED BY CULINARY TRAINING PARTNERS

350K
PAID TRADE MEDIA IMPRESSIONS

16
CHAIN PARTNER BRANDS

876
PARTICIPATING CHAIN LOCATIONS

60+
CHAIN PARTNER SOCIAL POSTS

Despite the reallocation of funding for this program early in the season, the foodservice program delivered on metrics while leaning on its strength in relationships and loyalty among partner foodservice operators.

Foodservice partners built preference for local, sustainable avocados into their brand DNA, while broadcasting and amplifying CAC's messages to their paying customers, AND buying and serving California Avocados in season.

Foodservice Highlights: Chain Promotions



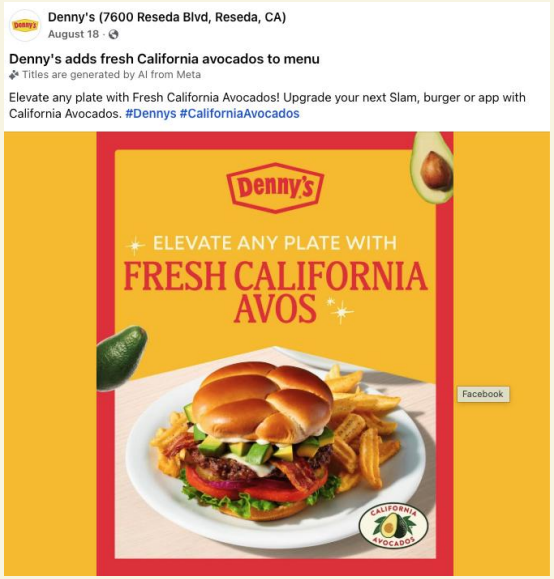
Approach

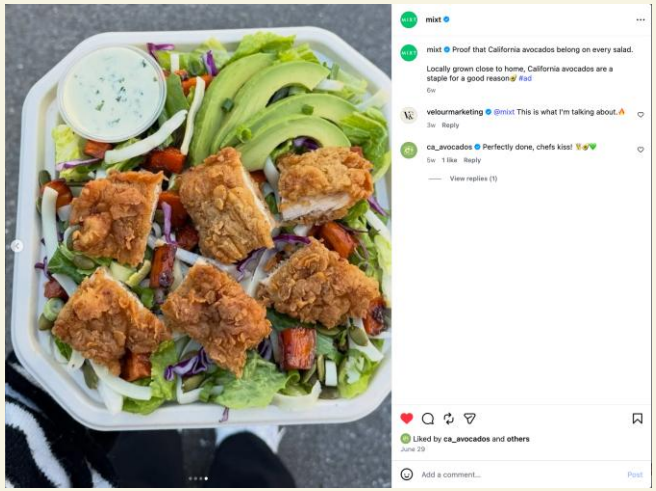
- Engage current chain partners to participate
- Meet potential new partners at industry events to sell in the program
- Activate menu promotions during the season, focused on digital/social media promotion, in-store POS and local/sustainable messaging

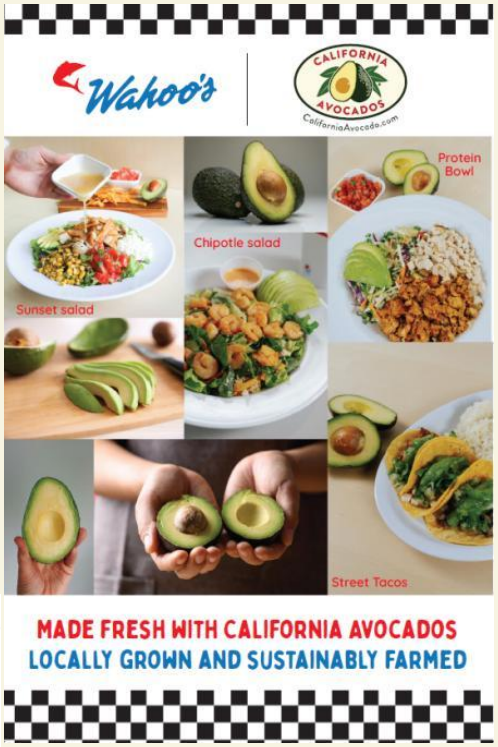
Results

- 16 brands ran CAC promotions from May 1-Aug 18
- 100% returning long-term chain partners from FY25
- 876 Locations
- 60+ social posts by partners promoting California Avocados, delivering seasonal, sustainable messaging

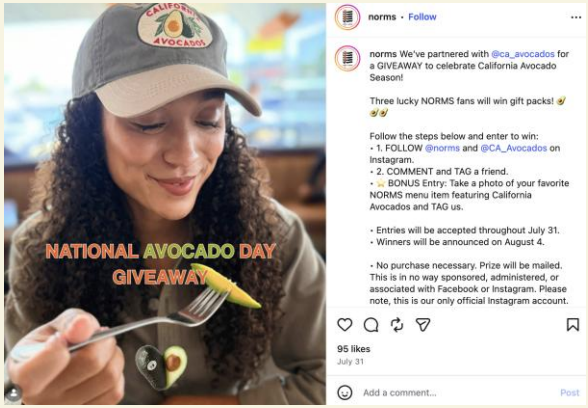
Chain Promotion Examples











Foodservice Highlights: Culinary Training & Education

Approach	• Hands-on, sensory on-site training and menu ideation with culinary staff/team members • Pair with pop-ups to reach a consumer audience • Position California Avocados as the preferred, premium, local source for fresh avocados • Menu signage and digital promotion of California Avocados at meal stations
Results	• Conducted training with Nike HQ, UCSB, Oregon State University, University of Washington culinary teams and at the Flavor Experience conference • Reached Gen Z guests at corporate and university settings with California Avocado messaging and culinary innovation • These institutions serve an estimated 13.3MM meals per year and focus on local sourcing

Foodservice Highlights: Media


Grilled California Avocado with Peanut Salsa Macha

Salsa Macha adds a nice crunch and spicy flavor to this dish.

FSD | FoodService Director



Culinary Arts: Alchemy or Artistry? Yes, to Both

Aneesha Hargrave, executive chef for the California Avocado Commission…creating an avocado-stuffed flatbread topped with a salad and finished with pickled avocados… layered flavors, spices and textures to create a bomb

FSR

Sponsored by California Avocado Commission

Chefs and operators share how seasonality, versatility, guest demand, and freshness turn this ingredient into a strategic advantage.

Doubling down: How California avocados drive menu value this season

For foodservice operators, spring and summer is the best time for California avocados. For operators, this means locally grown fruit at peak quality and freshness.

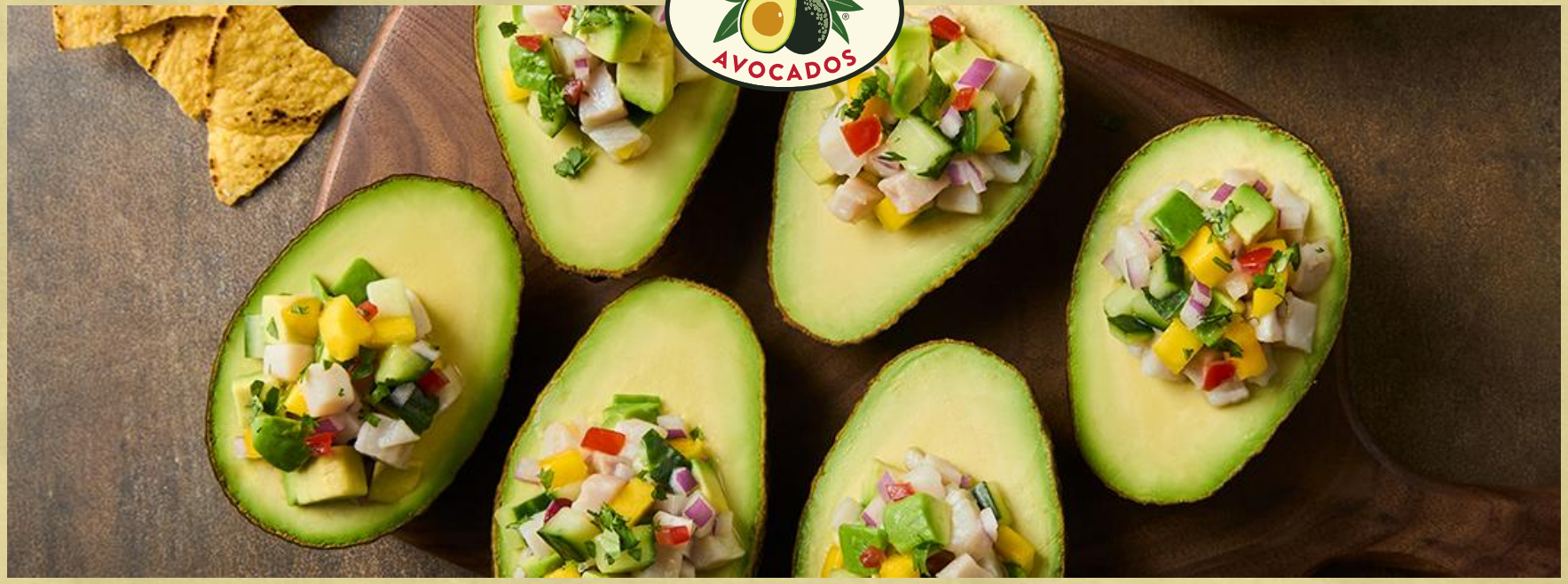


SmartBrief

Why seasonal sourcing is becoming more than a marketing strategy

How restaurants are turning peak-season ingredients into margin drivers and brand signals.

Approach	• Utilized paid and earned media to generate awareness of the California Avocado brand within foodservice industry • Focused on value-driven messaging with paid media • Showcased versatility and high benefit of California Avocados on the menu with earned media
Results	• $40,000 paid media investment yielded over 350,000 impressions, averaging $.11 per impression • Almost 50% of those who requested information from the California Avocado Commission were Director level and above



RESEARCH HIGHLIGHTS

Annual Tracking Study, California Market Analysis, California Avocado Branded Bag Study

Research: Tracking Study

Objective Metrics

Awareness

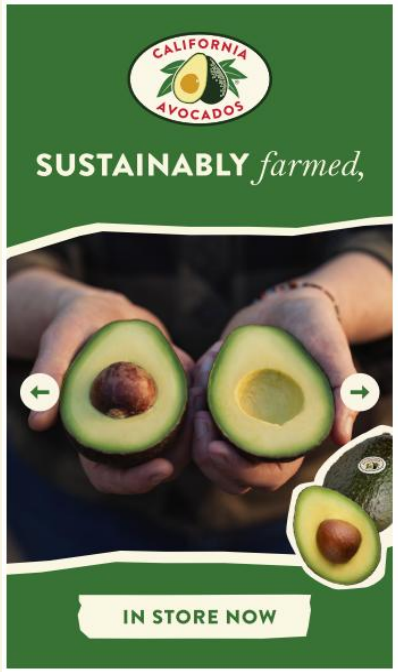
California region and ad awareness continue to be on par with Mexico, but region awareness fell slightly since last year (to 80% from 85% in 2025).

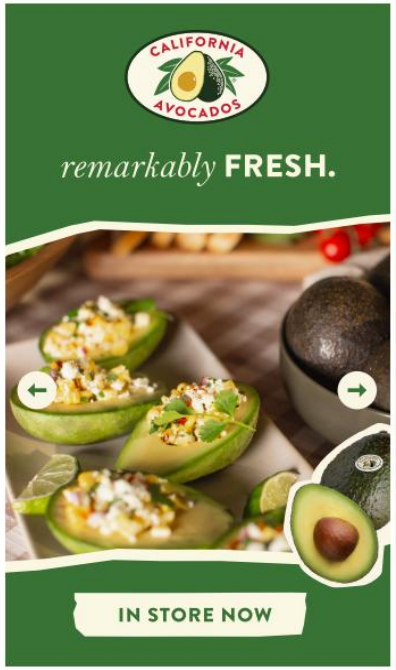
Preference

Preference for California continues to be very strong and above Mexico, but returned to 2024 levels as well (to 54% down from 61% in 2025).

Premium Perception

California maintained last year's perception of being the best, and worth paying more for (72% agree somewhat or strongly that California Avocados are the best). 61% say they are worth paying more for.









Research: Tracking Study

Additional Highlights

Willingness to Pay More

These attributes command willingness to pay more for California Avocados:

1. Locally grown
2. Fresher/higher quality
3. Grown in safe environmental conditions
4. In-season produce

Purchase Drivers

When choosing to buy avocados in general, taste is the most important factor, followed closely by grown in safe environmental conditions

"Grown in" Verbiage

Within California, Grown in CA is the most compelling signage, followed by Locally Grown; USA-grown decreased since last year







Research: Tracking Study

Recommendations

REINFORCE...

that California Avocados are superior and worth paying more for, with the messaging that resonated most with consumers:

- Locally/ California grown
- Fresh/better tasting
- Grown in safe environmental conditions
- In-season

SUPPORT...

messaging with growers' efforts to ensure California Avocados are sustainably and responsibly grown

TAILOR...

growing region message to regional audience (e.g., locally grown within California, USA-grown when marketing elsewhere)



Research: California Market Analysis

Overview:

- This study delivered a comprehensive assessment of evolving California Avocado market dynamics.
- Examined supply trends, retail sales performance, and FOB pricing within the California Avocado marketplace
- Established key metrics to evaluate and monitor California season performance
- Delivered to CAC staff in March 2026

FY2025 California Avocado market dynamics:

- The California Avocado crop declined 10% vs. FY 2024 to 325.6M lbs.
- California Avocados accounted for 48% of total California shipments (down -14 points)
- Retail ASP per pound in California averaged +14% above the rest of the country

Key Takeaways

- **Regional Shipments:** A greater share of the FY 2025 crop stayed in California, rising to 57% (+2 points vs. FY 2024)
- **Retail Volume:** Unit sales reached 470.9M in FY 2025, 2% below FY 2021, while dollar sales hit a five-year high of $647.5M
- **California Season Lift:** The 2025 season added +$45.2M in incremental retail dollar sales, offsetting a $31.6M decline in the rest of the year
- **Sales Velocity:** California Avocados delivered a $3.0K dollar sales velocity, more than double the $1.3K national average
- **Bagged vs. Bulk:** The retail price gap narrowed to 3 points in FY 2025. Outside California, the gap remained wider at 11 points

Research: California Avocado Branded Bag Study - Walmart

Overview:

- California Avocado branded bags ran at Walmart in two formats, a 6-count small Hass and a 4-count large Hass, across select Western Walmart regions from July to September 2025
- Results compared Walmart regions that carried the branded bags against the rest of market (ROM), 11 weeks ending 09-28-25 vs. year ago
- Delivered to CAC staff February 2026

Key Takeaways

- **Regions That Carried:** Walmart regions carrying the branded bags beat their ROM by +8.1 points in unit growth and +3.5 points in dollars
- **Bagged Growth:** Branded bags drove the gains, with total bagged units up +15.6% year over year
- **6-Count Driver:** The small 6-count bag led growth, up +213.4% in units and +170.5% in dollars
- **4-Count Velocity:** The large 4-count bag reached only 22.6% distribution but posted the highest sales velocity of any bag size where it was carried
- **Implication:** California-branded bags may offer an opportunity for growth and stronger performance relative to the market with the right support