

WORLD AVOCADO ORGANIZATION

Presented by Zac Bard, WAO President

SAMAC Meeting

Nelspruit , September 2024



Today's presentation:

- Opening, brief history & Setting the scene
- WAO European marketing review 2023
- A look at India – Successful WAO 2023 campaign
- Taking avocado promotions in Europe to the next level
 - Key avocado consumer insights across Europe
- Survey and Q&A
- Closing



WAO EUROPEAN MARKETING REVIEW

2023

First WAO promotions – 2017

Consumer education – avos are relatively new, low penetration

Communicate health benefits, versatility, convenience

WAO's Retail Support in 2023

- Spanning more than 12 countries



✓ Across the UK, Europe & most recently India.

- Over 30 Retailer campaigns



✓ National & Regional Campaigns.

- With more than 97 activities in-store & online

WAO 2023 Media, Social Media & Influencers Campaign



1 | A sustainable superfood: debunking myths

2 | A versatile nutritious and tasty food for a healthy lifestyle

Launch of the avocado environmental sustainability MYTH BUSTING CAMPAIGN

20 minutes

L'avocat plaide en faveur d'un plaisir non coupable

La culture de ce fruit, considéré comme un aliment santé, est en pleine croissance. Mais elle est aussi l'objet de nombreuses critiques. L'association française de producteurs d'avocats (AFA) a décidé de lancer une campagne de communication pour promouvoir ses avantages nutritionnels et environnementaux.

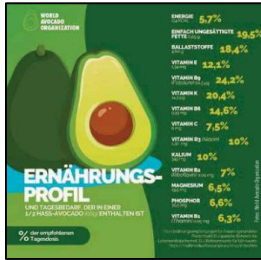
Avantages nutritionnels

L'avocat est riche en gras sains, en fibres et en vitamines. Il est également une source importante de potassium et de magnésium. Ces nutriments sont essentiels pour la santé cardiovasculaire et la régulation de la tension artérielle.

Avantages environnementaux

Contrairement à ce que beaucoup croient, l'avocat est un fruit à faible empreinte carbone. Sa culture nécessite peu d'eau et de produits phytosanitaires. De plus, les avocats sont souvent cultivés en agroécologie, ce qui favorise la biodiversité et la santé des sols.

FRUCHTHANDEL
Verantwortung übernehmen und aufklären



FRUITNET

DEBUNKING the myths

World Avocado Organization Director Zac Bard with Laura Chubbie about the green ripening in the avocado ripening process and the ripening process.

Myth 1: Avocados are high in fat.
Avocados are high in healthy fats, specifically monounsaturated fats, which are beneficial for heart health. They also contain fiber and essential vitamins.

Myth 2: Avocados are high in calories.
While avocados are calorie-dense, they are also very nutrient-dense. The healthy fats and fiber in avocados can help with satiety and overall health.

Fresh Plaza

Consommation d'avocat : « La France n'a pas encore atteint son plein potentiel »

végétale

La durabilité au cœur des préoccupations

THE AVOCADO DEBATE

HONOR MAY ELDRIDGE

CHANGING PLANET

FoodNavigator EUROPE

The search for the 'super Hass': How the avocado industry is battling 'misconceptions' about the 'world's favourite superfood'

Fresh Plaza

"Asia, con promociones, puede convertirse en un mercado masivo"

La producción de aguacate ha crecido significativamente en los últimos cinco años y se espera que continúe creciendo en los próximos años, aunque ya se observa una desaceleración, según cuenta Zac Bard, CEO de la World Avocado Organization, WAO.

elEconomista.es

La digitalización en el cultivo de aguacates permite reducir el uso del agua hasta un 50%

MERCADOS

La hoja de ruta de la WAO se centra en la búsqueda de la calidad y la promoción internacional



REUSSIR Fruits & Légumes
Nourir votre performance

Avocat : l'Association mondiale de l'avocat poursuit sa promotion en France

Alimarket
Cuestión de confianza

Zac Bard (WAO): "Que dos tercios de la población mundial incluyan aguacate en su dieta puede cambiar el futuro"

Impact

24 interviews and background briefings resulted in 15 positive stories

Proactive approach helped in mitigating negative coverage

We Educated Consumers through Top Media Outreach

THE Sun



HOLA



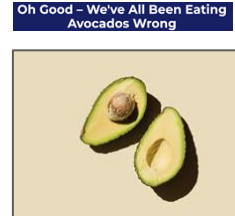
stern



M



HUFFPOST



ELLE



20minutos



freundin

REZEPT: AVOCADO-TATAR MIT DILLCREME UND POCHIERTEM EIGEL

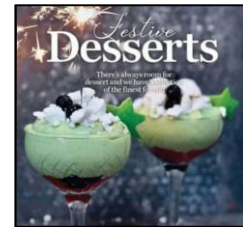


Cuisine Actuelle

Avocat : quelle variété choisir et quelle est la véritable saison



FOOD & LIVING
Vegan



Impact

553 positive stories reaching 842 Million European consumers

Social Media & Influencer Activities

- 4 social media channels
- 626 social media posts in 4 EU markets/languages
- 15 influencer marketing collaborations
- 143 influencer stories

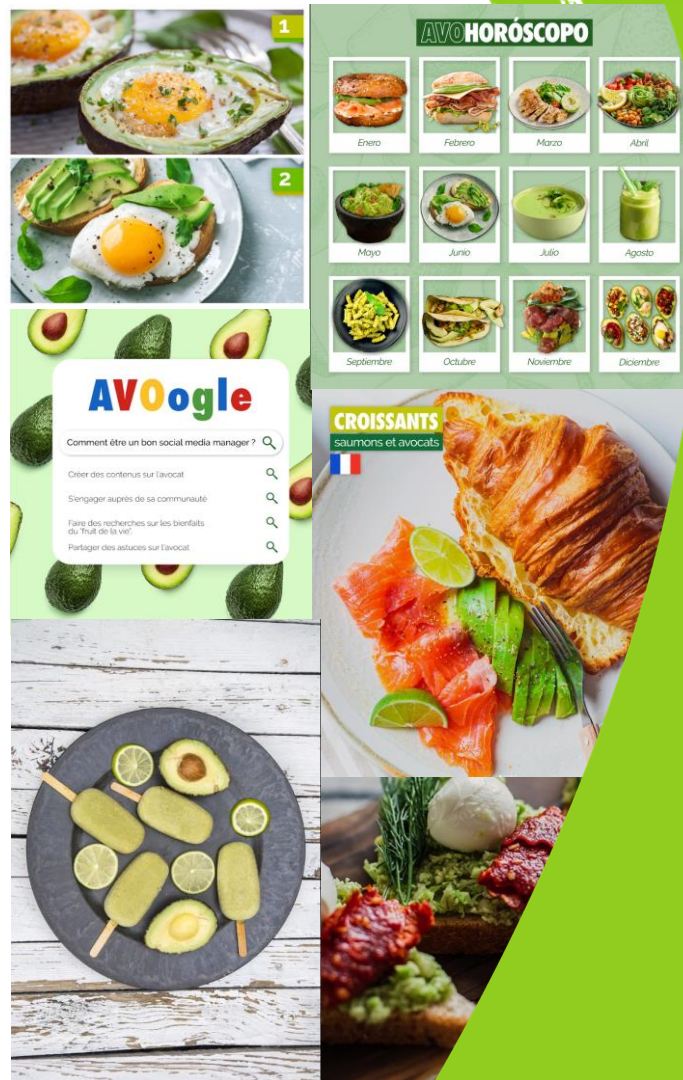


Impact

31 Million Total Reach

9.2% Engagement Rate

Over 200.000 Followers



Let's Have a Look...





A LOOK AT INDIA

WAO Marketing Campaign 2023

Presentation Roadmap

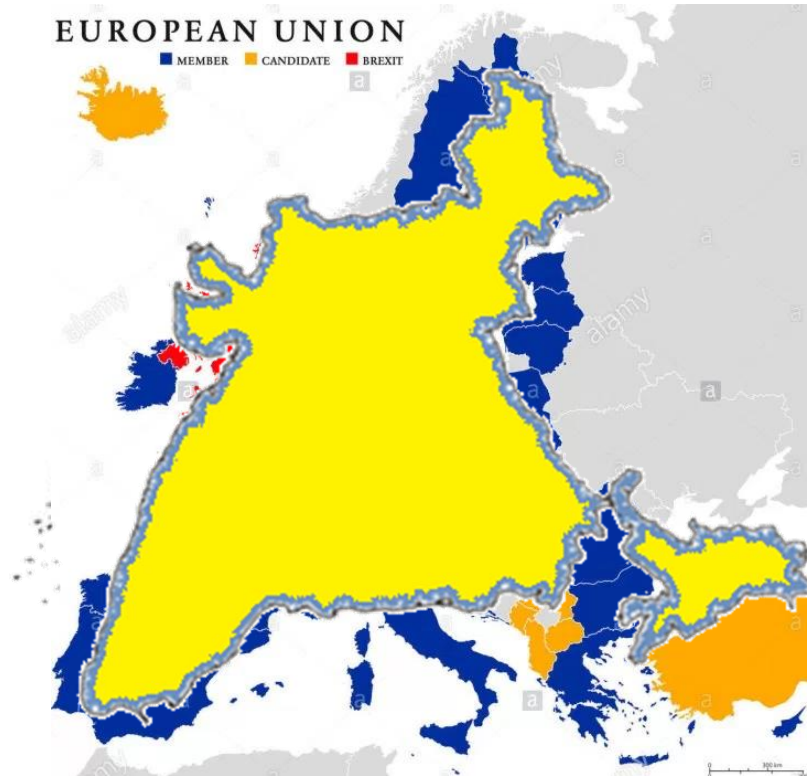
- ❑ **About India**
- ❑ **About Indian Avocado Market**
- ❑ **WAO Promotions**
- ❑ **Future steps**



India – No Market Like It

- ❑ **Not a country**
 - **A Continent**
- ❑ **Strong Economy**
 - **Resilient to many global turmoil**
- ❑ **Food Economy**
 - **300 million consumers!**
 - **Unified by aspiration**
- ❑ **Small Families**
 - **Open to change**
 - **Young population**
- ❑ **High disposable incomes**
 - **Willingness to spend**
- ❑ **Media Revolution**
 - **Part of a Global Village**
- ❑ **Imported Food**
 - **Niche to Mainstream**
- ❑ **Avocado Consumption**
 - **Rising exponentially**

India Consumer Mosaic



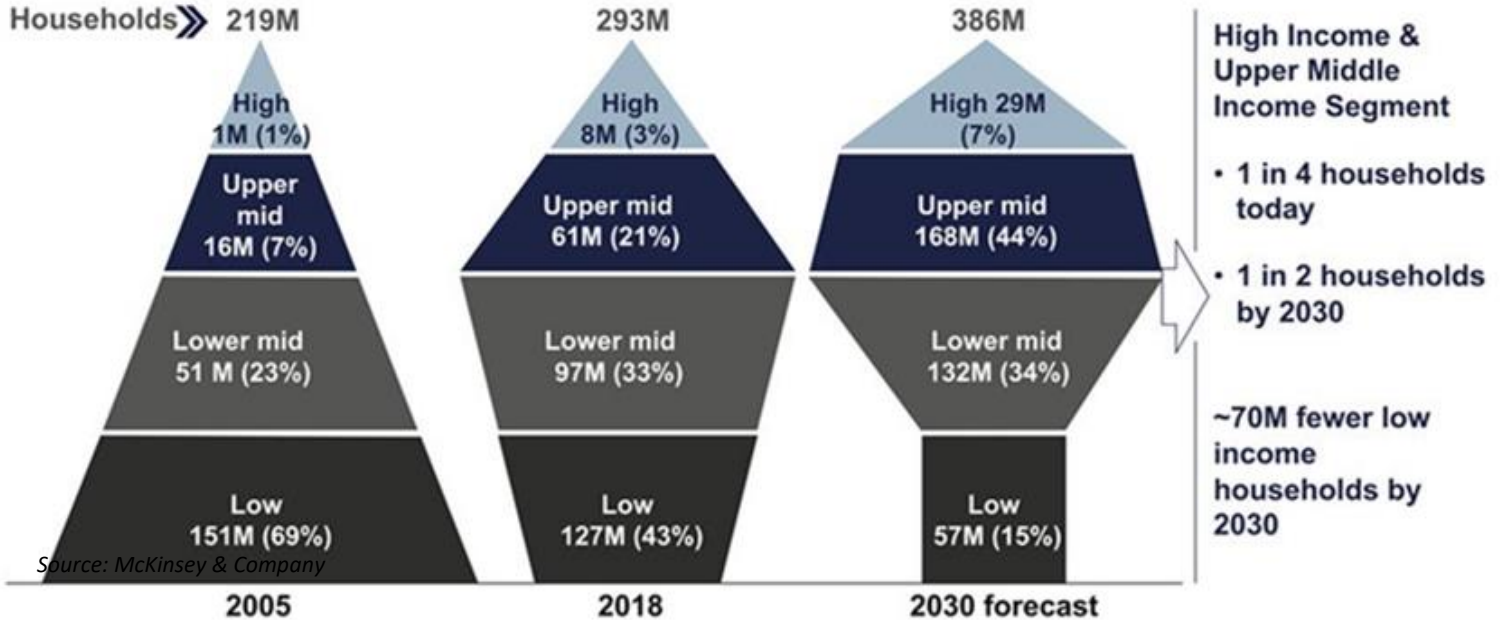
Map for representative purposes, not strictly to scale.

Source: Third Eyesight

	European Union	India
Comprises of	28 countries	29 States, 7 Union Terr.
Area	4.08 million km ²	3.3 million km ²
Population	511+ million	1.4+ billion
Languages	24 official, 150 minority	22 official, 1600+ other major & minor

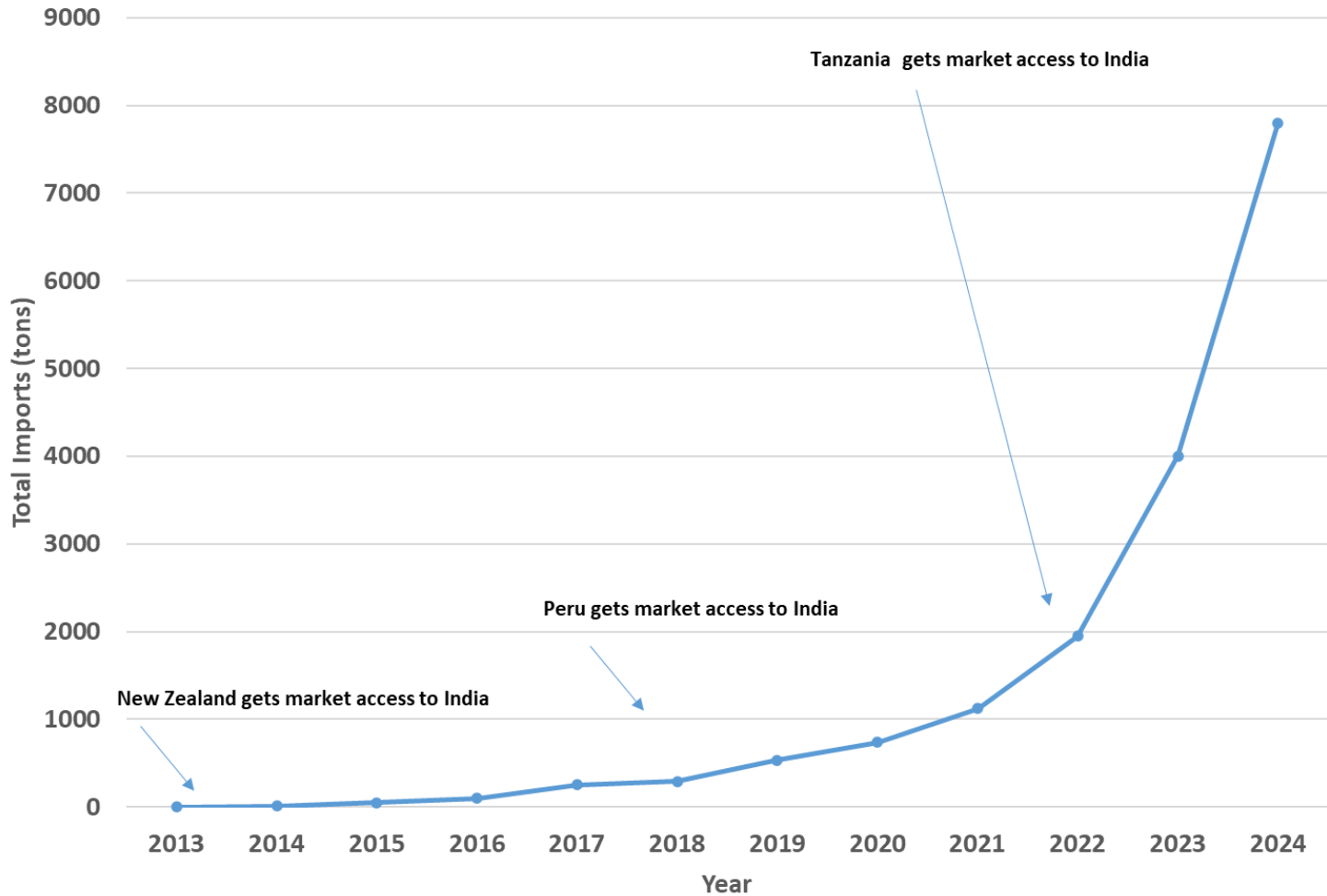
India Consumer Base

Evolution of the household-income profile in India



Vegetarians 40 % of population

Avocado imports to India 2013 - 2021



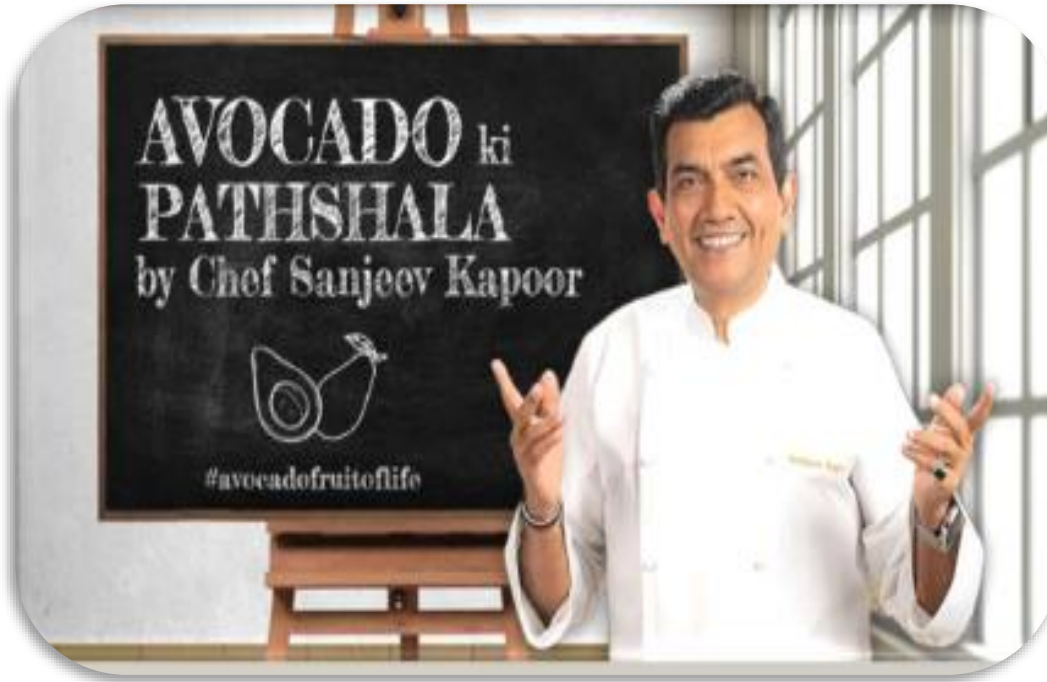
2023 WAO India Campaign



WAO 2023 Activities

- ❑ **A pilot 5 month Educational campaign was launched in June 2023**
- ❑ **Campaign included:**
 - **WAO engagement with celebrated Indian voices**
 - **Outreach to leading food and lifestyle media**
 - **Outreach through celebrated chefs and nutritionists**
- ❑ **Campaign results were outstanding**

Campaign Start - Avocado Ki Pathshala (School of Avocados)



Social Media Campaign with Celebrity Chefs



Meghna's Food Magic
Followers: 6M



Impressions: 17.2M | Reach: 3.5M



Chef Rakhee Vaswani
Followers: 136K



Impressions: 262K | Reach: 150K



Aruna Vijay
Followers: 556K



Impressions: 756K | Reach: 325K



Neha Deepak Shah
Followers: 2.5M



Impressions: 5.6M | Reach: 2.5M



Chef Harpal Singh Sokhi
Followers: 1.6M



Impressions: 2M | Reach: 250K

Promotion with Nutritionists



Pooja Makhija
Followers: 404K



Impressions: 383K | Reach: 209K



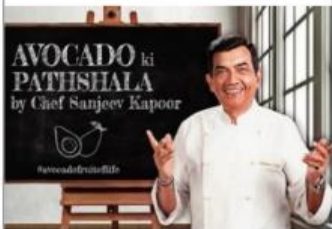
Kavita Devgan
Followers: 51 K



Impressions: 25K | Reach: 18K

PR & Media Outreach Activities

Sanjeev Kapoor's avocado pathshala



Chef Sanjeev Kapoor is set to give insights on avocado on his social media handles

Avocado, a green and buttery fruit, has garnered global attention and has gained immense popularity in India. Chef Sanjeev Kapoor is embracing this trend through the Avocado Ki Pathshala, a consumer education campaign. "In association with World Avocado Organization, Chef Kapoor is set to provide a comprehensive guide to exploring the wonders of avocados on his social media platforms. This online initiative educates consumers about the basics of avocados," informs brand's management team.

"Join us to explore interesting tips and recipes that cover everything about this creamy and nutritious superfood!" shares Sanjeev Kapoor.

"In the series, Sanjeev Kapoor will share insights on avocado selection, cutting, storage, and seamless integration into diverse Indian cuisines. The recipes can be checked out on Chef Sanjeev Kapoor's official social media handles," the team adds.

Avocado Cheese Spread: The Perfect Alternative to Mayonnaise

Chef Neha Deepak Shah, renowned for her culinary expertise and passion for creating delightful dishes, proudly presented her creative culinary creation, Avocado Cheese Spread. This was done as part of the ongoing educational campaign of World Avocado Organization that seeks to reach the population more about avocados and their great benefits.

This revolutionary dairy-free recipe has not only captured the hearts of food enthusiasts but has also taken social media by storm, garnering over a million views in just four days. Her audience is enthusiastically requesting the recipe and sharing their culinary creations, tagging Chef Neha in their posts.

"Avocado Cheese Spread is the perfect replacement for Mayo or unhealthy spreads. It is wholesome, packed with good fats," added Chef Neha Shah.

"Avocado Cheese Spread blends creamy avocados with savory flavours offering a delicious and nutritious alternative for those who are lactose intolerant, or those looking for healthy-eating without compromising on taste. The recipe is available on the social media handles of Chef Neha Deepak Shah."



Avocado Cheese Spread blends creamy avocados with savory flavours

Avocado Uttapam Tacos: ब्रेकफास्ट में चाहते हैं देसी द्रव्य तो ट्राई करें एवोकाडो उत्तपम टैकोस रेसिपी

Join Breakfast Recipes series to get all the latest and best recipes to try at home.

World Heart Day - How Avocados can help you keep your Heart Healthy

Nutrient-packed avocados are the ultimate first food for babies

Avocados are a nutrient-rich fruit that are perfect for babies. They are easy to digest and provide essential vitamins and minerals. Avocados are also a good source of healthy fats, which are important for brain development.

India offers immense potential for avocado consumption: Zac Bard, chairman, WAO

World Avocado Organization (WAO) chairman, Zac Bard, shares his insights on the growing avocado market in India. He highlights the health benefits of avocados and the potential for increased consumption in the Indian market.

How to eat avocados: Diet food of diabetics to perfect friend for weight loss

Avocados are a healthy and nutritious fruit that can help you lose weight and manage diabetes. They are low in carbs and high in healthy fats. This article provides tips on how to incorporate avocados into your diet.

How avocados help in weight loss

Health expert reveals 5 reasons how avocados can help you fight obesity. Avocados are rich in monounsaturated fats, which can help reduce inflammation and improve heart health. They also contain fiber, which helps with digestion and keeps you full longer.

Overall Activity Results

2023 KPIs	2023 Results
375 Clippings	509 clippings
6 million Impressions	32.9 Million Impressions
2% Engagement Rate	Approx. 2.2% Engagement Rate
90 Million Total PR Reach	772 Million Total PR Reach
15 Million Followers	47.21 Million Followers reached
\$57.3K Advertising Value	

How to Know if an Avocado is Ripe

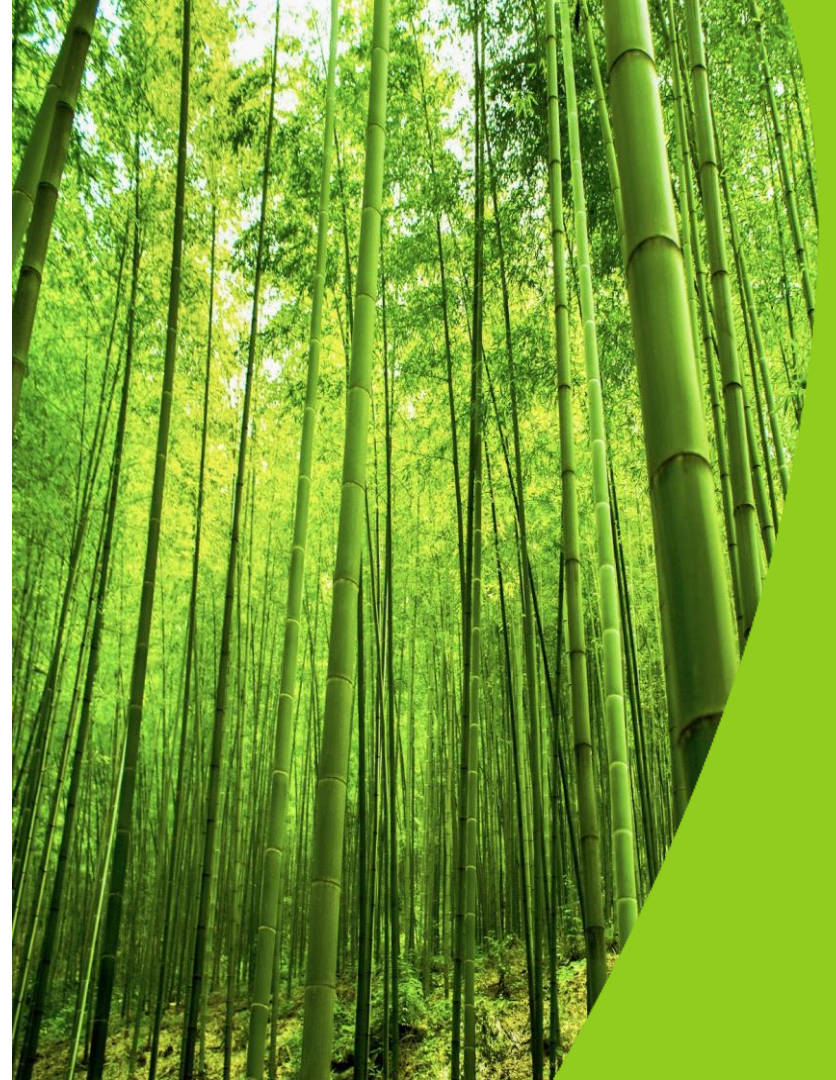


How to Cut & Store An Avo



Way Forward

- ❑ **Tip of the Iceberg**
- ❑ **Piece vs. Size**
- ❑ **Year Round Push**
- ❑ **Long Term View**





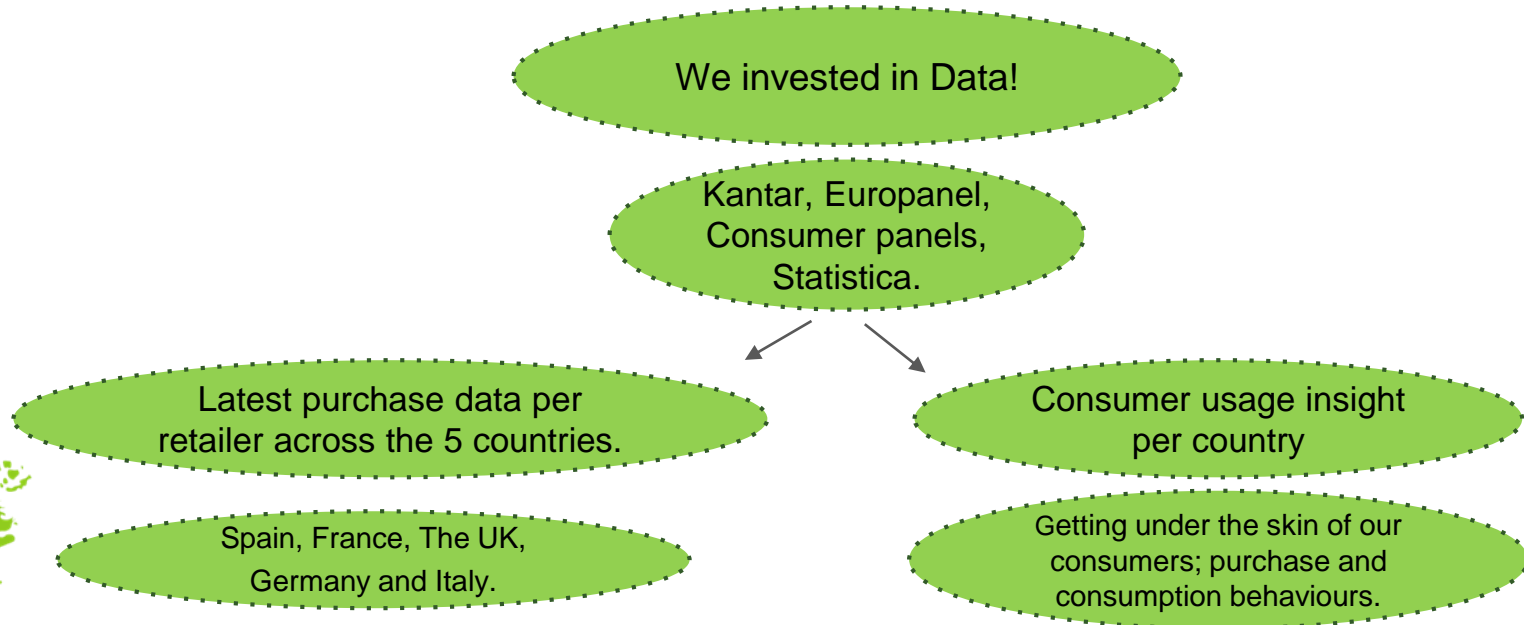
**TAKING AVOCADO
PROMOTIONS IN
EUROPE TO THE
NEXT LEVEL –**

**KEY INSIGHTS ACROSS
EUROPE**

We listened to WAO members:

Survey Questions we asked last year in Madrid (October):





- **What is the role of WAO** - 30% said support us to sell more, 30% deliver global news.
- **What is mostly slowing your sales** - 55% lack of data to support customer plans.
- **Would consumer insight be valuable to your customers** - 82% said yes!



WAO is armed to take the fruit category to the next level

- ✓ We know **who the consumer is**
- ✓ We know **their age, social status, family size**
- ✓ We know **where they are buying**
- ✓ We know **why they are buying** - their biggest motivators
- ✓ We know **when in the day** they love to eat avocado
- ✓ We know what they **like to eat it with**
- ✓ We know what marketing **activities will drive consumption**
- ✓ We know **what retail stores are selling** the most
- ✓ We know **what retailers to focus** on to sell more



	Breakfast
	Lunch
	Dinner
	Snacks

It's time to act like multinational brands; with insights and data we can help buyers understand opportunities for growth

The target Avocado consumer:

- The opportunity across all countries lies with the younger generation, those with more disposable income.



UK greatest opportunity with core consumer:

- Age: Emma aged 28 - 44 years
 - Purchasing Gender: Female bias
 - Class: Upmarket / middle (A,B,C1)
 - Life stage: Pre-family, Young family, don't alienate empty nesters, who currently make up the biggest consumer base.
-
- WAO recommendation 2024: Driving penetration to millennials to increase the longevity of the influence.

Avocado penetration is so varied per country:

→ Spain has the **highest penetration at 78%** vs Italy at 17%!

★ Penetration: the % of households purchasing over a year.

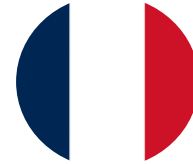


Country specific Data:

- Core Consumer: Maria, from Madrid, Spain
- Social class: Middle class
- Biggest occasion: Evening meals & Breakfast
- Purchase behaviour: High prices, high frequency.
- WAO recommendation 2024: Driving penetration among middle-age consumers because they have the highest propensity to purchase but with a regional bias where they under index

Young French consumers under index in avocado purchasing:

- French consumers average weight of purchase is **4.9kg per year**,
- A kg less than Spanish consumers awp at 5.9kg per year.
 - ★ Note this index is retail focused, different to Consumption per capita, which is 2.28kg in France.
 - ★ Average weight of purchase (AWP) - volume purchased per buyer per annum



Country specific Data:

- Core Consumer: Leslie, from France.
- Lifestage: Young without children.
- Opportunity for growth: Avocados only feature in 12% of mixed salads, where salads are included in 70% of meals.
- WAO recommendation 2024: Driving penetration with the target consumer who currently under-indexes in avocado purchasing.

Local adaptation is so important for each country:

- 45% of all German avocado occasions are eaten with bread
- So different to UK consumers, with over 34% of occasions are with the evening meal.



Country specific Data:

- ❑ Core Consumer: Sonja, from Germany
- ❑ Social class: Upmarket female.
- ❑ Usage occasion: Abendbrot is the #1 meal in Germany, avocado pairs so well with bread. |
- ❑ WAO recommendation 2024: Driving penetration among the core consumer, who has the highest propensity to purchase.

There are still big opportunities across Europe:

- Only 17% of households in Italy are purchasing avocados!!!
- WAO will support emerging markets with different marketing activities
 - ◆ Educate
 - ◆ Inspire
 - ◆ Inform



Country specific Data:

- Avocado market growth: Double digit growth since 2020
- Average Avocado price: Approx €2.50 per shopping trip, high in line with other EU countries.
- Shopper frequency: Purchasing 4 x per year.
- Usage occasion: Skewed towards weekends, in line with new consumer uptake
- WAO recommendation 2024: Huge growth opportunity, in targeted retailers where WAO members supply.

Understanding what will underpin our Marketing Support:



- Universal across all countries

WHY DO CONSUMERS BUY AVOCADOS

- #1 consumer usage needstate

POSITIVE HEALTH

WHY ARE CONSUMERS NOT BUYING AVOCADOS

- #1 Not knowing when it is ripe, bad experience



Sustainability focus is set to increase!



Deforestation
Carbon footprint
Water usage

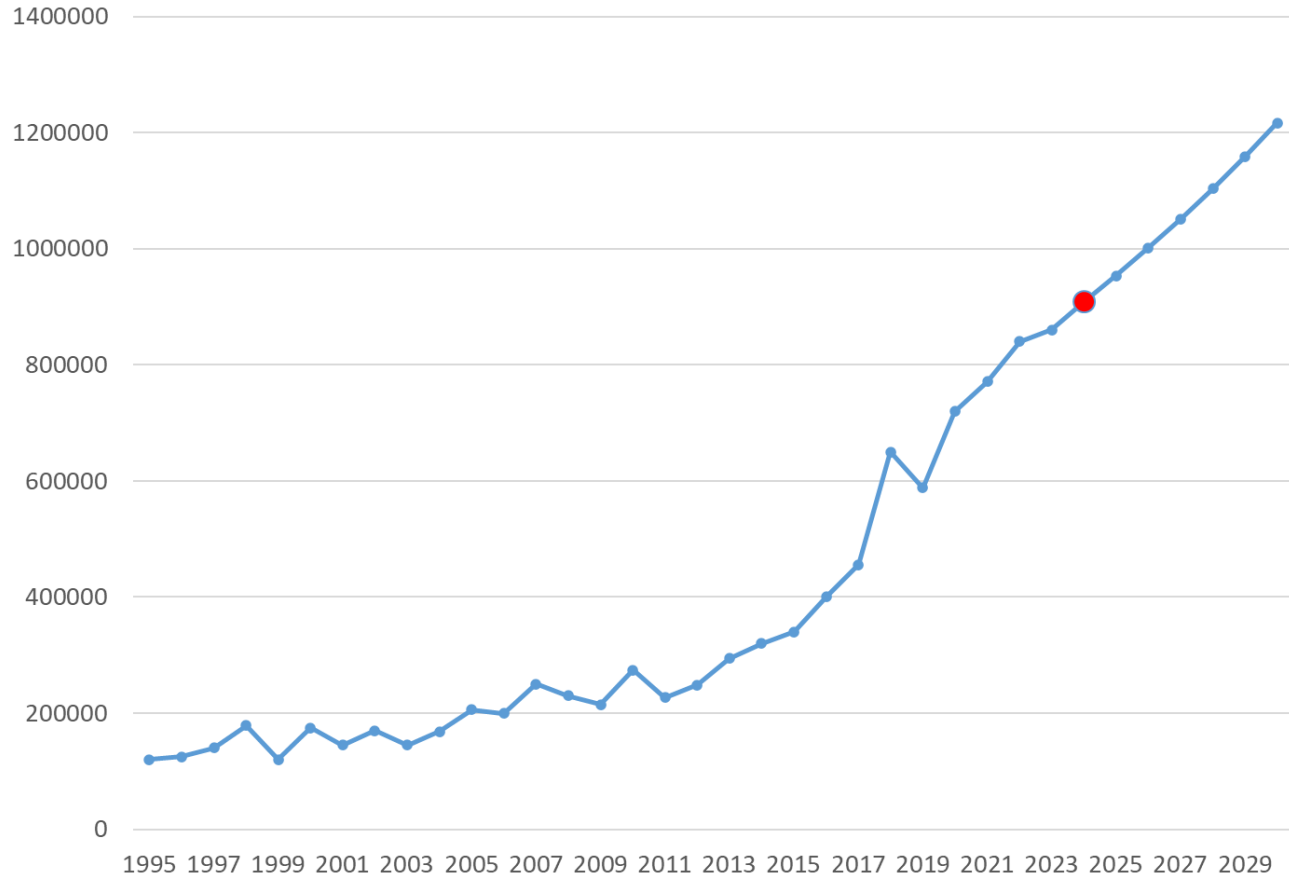
WAO's PR campaign will continue to tackle negative stories proactively and reactively with the facts.

Successful?

- Avocados are the most prevalent fruit on social media
- Increases in volumes in Europe have not had the equivalent impact of prices with few exceptions where EU summer volume increases were 15 – 25 %!
- Rule of thumb: difference between over an undersupply is as low as 8 percent. Historic volume increases have been in many cases way above this!
- (Growth rate in the USA is even higher thanks to USD 80 million HAB annual budget!
- SA has still maintained itself as an origin in spite of Peru grown at ridiculously high rates, especially in more recent years.
- 2022 & 2023 economically tough years in Europe (gas prices, Ukraine/Russia, post covid etc).
- 2024 volumes increased from 2023 by 6 percent, but returns (except in the early season where absolute record volumes were reached), have shot up.
- SA has a record crop with probably record returns for mid and late season.

**ALL OF THIS DID NOT HAPPEN BY ACCIDENT
PROMOTIONS CAN NOT CLAIM ALL THE CREDIT
BUT
THE SMALL INVESTMENT IN MARKET DEVELOPMENT
CERTAINLY PLAYED A SIGNIFICANT ROLE**

EU avo Market past and forecast





SURVEY

Support WAO to provide a better service!

Please hold up your phones, to complete our short survey!





QUESTIONS & ANSWERS



**THANK YOU
VERY MUCH**