

Mango Development Index Report

**9 U.S. Regions & 48 Markets
52 Weeks Ending 12/27/2008**

Provided by the Perishables Group on behalf of the National Mango Board

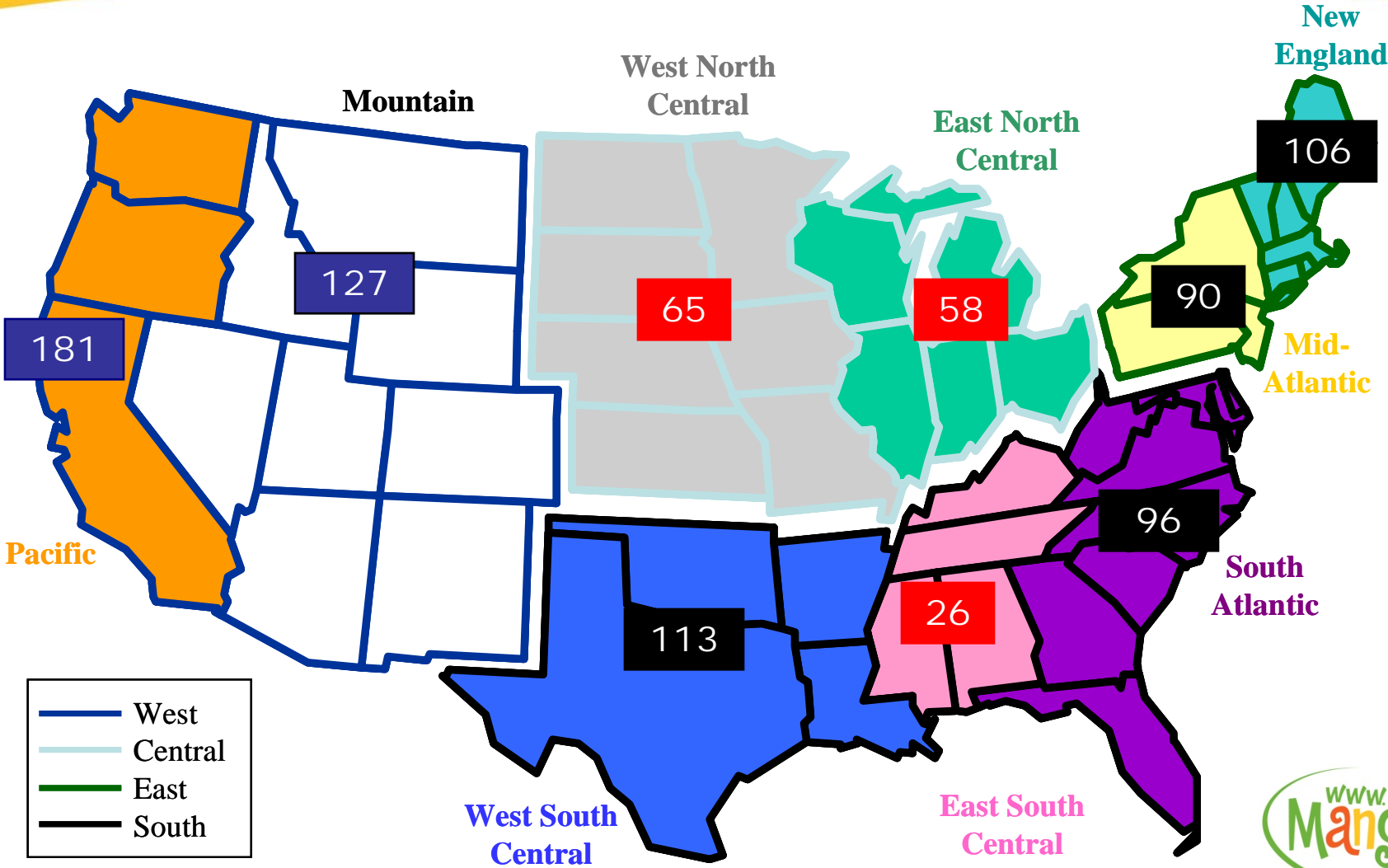


Understanding the Market Index

- The Mango Market Development Index is designed to measure and compare mango performance relative to population by region and market
- The index system allows for easy comparisons
- The national/total U.S. index is 100
- An index greater than 120 represents a significant above-average mango performance – these are shown in blue throughout the report
- An index less than 80 represents a significant below-average mango performance – these are shown in red throughout the report
- An index between 81 and 119 represents mango performance that is more comparable to the U.S. average – these are shown in black throughout the report



Mango Index by U.S. Region



Blue = Index > 120 Red = Index < 80

Sources: Perishables Group FreshFacts® powered by the Nielsen Company and the US Census Bureau



Regional Mango Index Summary

- The Pacific sub-region was by far the leading region for mangos, indexing very high at 181 (8 point increase compared to 2007)
- Even though these sub-regions increased in 2008, there is still much opportunity for growth in the West North Central (index of 65) and East North Central (index of 58) sub-regions

Mango Subcategory Development Index by Sub-Region

Market	Index
Total U.S.	100
Pacific Sub-region	181
Mountain Sub-region	127
West South Central Sub-region	113
New England Sub-region	106
South Atlantic Sub-region	96
Mid Atlantic Sub-region	90
West North Central Sub-region	65
East North Central Sub-region	58
East South Central Sub-region	26

Blue = Index > 120 Red = Index < 80

Sources: Perishables Group FreshFacts® powered by the Nielsen Company and the US Census Bureau



Regional Mango Index Change

- In 2008, six out of the nine sub-regions showed an increase in the mango performance index compared to 2007
 - The Mountain sub-region had the largest growth with a 16 point increase
 - The East North Central sub-region showed a 5 point increase in this underperforming region
- While still indexing moderately, the South Atlantic sub-region decreased by 9 points in 2008
- The East South Central sub-region continued to decline. There is much opportunity to improve performance in this region that significantly underperformed

Market	2008 Index	2007 Index	Pt Change
Total U.S.	100	100	0
Pacific Sub-region	181	173	8
Mountain Sub-region	127	111	16
West South Central Sub-region	113	115	(2)
New England Sub-region	106	105	1
South Atlantic Sub-region	96	105	(9)
Mid Atlantic Sub-region	90	87	3
West North Central Sub-region	65	62	3
East North Central Sub-region	58	53	5
East South Central Sub-region	26	29	(3)

Blue = Index > 120 Red = Index < 80

Sources: Perishables Group FreshFacts® powered by the Nielsen Company and the US Census Bureau



Mango Index by Market

Index by ScanTrack Market – 48 Markets

Market	Index
Total U.S.	100
San Francisco	228
Los Angeles	217
Houston	205
Sacramento	193
Las Vegas	191
San Diego	182
Miami	175
Washington DC	164
Phoenix	155
Denver	139
Dallas	133
Minneapolis	130
Orlando	122
New York	119
Baltimore	116
Seattle	113
Boston	109
Tampa	109
Hartford-New Haven	100
Jacksonville	98
Philadelphia	94
Chicago	93
Grand Rapids	90
Buffalo-Rochester	83

Market	Index
Total U.S.	100
Atlanta	82
Portland OR	82
Albany	74
Syracuse	73
West Texas	72
Columbus	69
Detroit	61
Richmond-Norfolk	53
Salt Lake City-Boise	52
Raleigh-Durham	51
Milwaukee	50
Charlotte	44
Indianapolis	43
Cincinnati	42
Pittsburgh	41
Louisville	39
Cleveland	38
St Louis	38
New Orleans-Mobile	32
Nashville	31
Birmingham	18
Memphis	17
Little Rock	16
Oklahoma City-Tulsa	7

Blue = Index > 120 Red = Index < 80

Sources: Perishables Group FreshFacts® powered by the Nielsen Company and the US Census Bureau



Mango Index by Market

Market Summary

- Three of the 48 markets indexed over 200. These areas also have high Hispanic populations contributing to their strong mango performance
 - San Francisco = 228
 - Los Angeles = 217
 - Houston = 205
- Sacramento and Las Vegas are also leading markets, indexing just under 200
- The Pacific Region indexed the highest among the nine regions which is driven by high index markets in California:
 - San Francisco = 228
 - Los Angeles = 217
 - Sacramento = 193
 - San Diego = 182



Mango Index by Market

Market Summary

- These markets indexed extremely low, demonstrating a growth opportunity, especially those located in the East South Central Region which by far ranked the lowest among the nine regions:
 - Oklahoma City/Tulsa = 7
(Declined by 16 points compared to 2007)
 - Little Rock = 16
 - Memphis = 17
 - Birmingham = 18
 - Nashville = 31
 - New Orleans/Mobile = 32



Mango Index Change by Market

- While there was some slight variance in 2008 compared to 2007 in market indexes, overall strong and weak markets remained

Market	2008 Index	2007 Index	Pt Change
Total U.S.	100	100	0
San Francisco	228	198	30
Los Angeles	217	213	4
Houston	205	218	(13)
Sacramento	193	141	52
Las Vegas	191	188	3
San Diego	182	176	6
Miami	175	190	(15)
Washington DC	164	203	(39)
Phoenix	155	132	23
Denver	139	109	30
Dallas	133	152	(19)
Minneapolis	130	98	32
Orlando	122	120	2
New York	119	113	6
Baltimore	116	133	(17)
Seattle	113	120	(7)
Boston	109	110	(1)
Tampa	109	105	4
Hartford-New Haven	100	103	(3)
Jacksonville	98	97	1
Philadelphia	94	87	7
Chicago	93	92	1
Grand Rapids	90	114	(24)
Buffalo-Rochester	83	94	(11)

Market	2008 Index	2007 Index	Pt Change
Total U.S.	100	100	0
Atlanta	82	86	(4)
Portland OR	82	106	(24)
Albany	74	68	6
Syracuse	73	71	2
West Texas	72	75	(3)
Columbus	69	69	0
Detroit	61	64	(3)
Richmond-Norfolk	53	55	(2)
Salt Lake City-Boise	52	58	(6)
Raleigh-Durham	51	53	(2)
Milwaukee	50	64	(14)
Charlotte	44	44	0
Indianapolis	43	41	2
Cincinnati	42	43	(1)
Pittsburgh	41	47	(6)
Louisville	39	45	(6)
Cleveland	38	47	(9)
St Louis	38	45	(7)
New Orleans-Mobile	32	38	(6)
Nashville	31	36	(5)
Birmingham	18	20	(2)
Memphis	17	19	(2)
Little Rock	16	18	(2)
Oklahoma City-Tulsa	7	23	(16)

Blue = Index > 120 Red = Index < 80

Sources: Perishables Group FreshFacts® powered by the Nielsen Company and the US Census Bureau



Mango Index Change by Market

- Seventeen markets showed an increase in growth while five markets showed significant increases by more than 20 points
 - Sacramento had the highest increase at 52 points followed by San Francisco at 30 points showing there is still growth in this over performing region
 - Minneapolis showed a significant 32 point increase, especially since this is in an underperforming sub-region
 - Denver increased by 30 points followed by Phoenix at 23 points
- Twenty-nine markets showed a decline in growth while 10 markets declined by more than 10 points
 - Washington, DC showed the greatest decrease with a decline of 39 points; although, this market still indexed above average
 - Portland and Grand Rapids dropped by 24 points from an above national average to a low average index



CDI Methodology

Methodology and Definition of Terms:

- Data and analysis is provided by the Perishables Group (PG) using their proprietary FreshFacts® data set powered by the Nielsen company, as well as US census population data to achieve development indexing
- The data set time period was 52 weeks ending 12/27/2008
- 2007 index from data set of 52 weeks ending 8/25/2007
- PG compiled category index figures for 48 out of the 52 ScanTrack Markets
 - Markets that did not meet an adequate level of ACV coverage include: Omaha, Des Moines, Kansas City, and San Antonio
- Definitions and Calculations
 - Category Development Index is the relationship between unit sales of and the population of an area for all products in the category
 - Calculation: $(\text{Geography Category Sales} / \text{Geography Population}) / (\text{National Category Sales} / \text{National Population})$



CDI Methodology

- Unit of Measure for CDI
 - PG reports CDI based on dollars only, as volume unit of measure may vary across perishables categories
- Geographies Available for CDI
 - PG currently collects population data by county
 - This allows PG to compute a population estimate for any geographical area that is built up from counties, such as ScanTrack® markets

