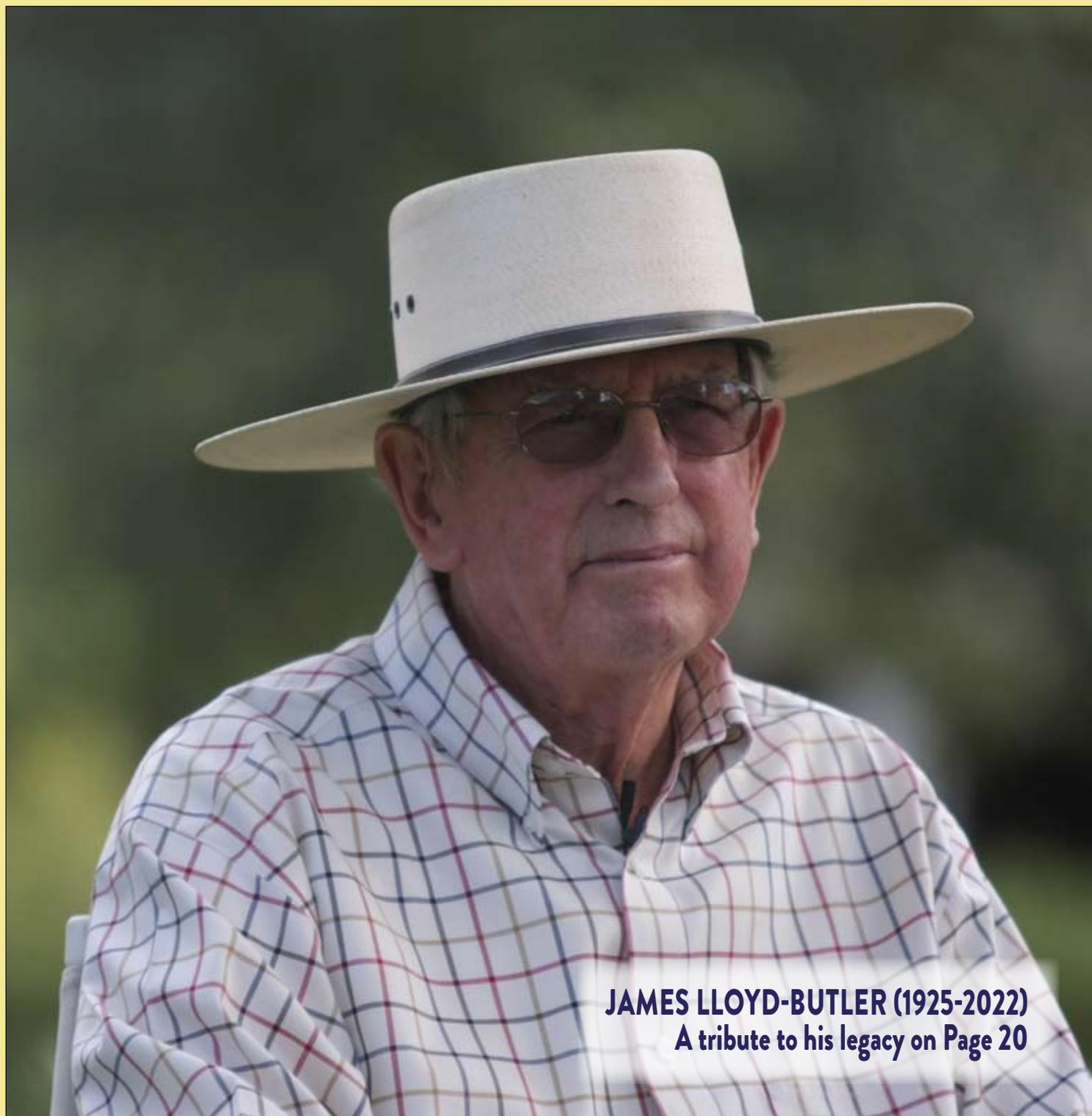


From the **Grove**

Spring 2022

The Latest News from the California Avocado Industry



JAMES LLOYD-BUTLER (1925-2022)
A tribute to his legacy on Page 20



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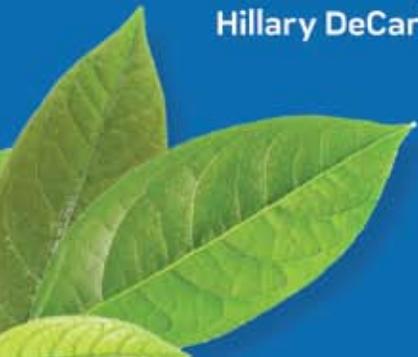
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**JAMES LLOYD-BUTLER
(1925-2022)**
A tribute to his legacy on Page 20



From the Grove

Volume 12, Number 1

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The articles, opinions and advertisements presented in this magazine are designed to offer information and provoke thought. Inclusion in this publication does not presume an endorsement or recommendation by the California Avocado Commission for any particular product or cultural practice.

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To give you a sense of where we're going, first let me catch you up on where we've been...

In the winter issue of this magazine, I noted that in November 2021 the California Avocado Commission Board engaged the executive search firm, Boyden, to help identify and recruit our next President. Over the past few months, the Succession Task Force — a small group comprised of current and former Board members — has been working closely with the Boyden recruiters, Jeff Hodge and Gwen Sabo, to drive this process forward, and I am happy to report that it is nearing the end.

While it has been a busy few months for the Boyden recruiters and the Task Force, preparation for this leadership transition has been many years in the making and advanced by the collective effort of many stakeholders. In 2017, President Tom Bellamore and Chairman Rick Shade kicked off the effort with the Board and with the formation of an ad hoc Succession Committee. The work product of this effort five months later was a comprehensive Succession Plan, prepared well ahead of Tom's retirement date but in place, in case of emergency.

It is articulated in the Succession Plan that there should be regular review and modification as necessary, but over more than four years, it is still on point. For example, the Succession Plan identified the following short- and long-term priorities:

- Position California avocados to be the world's most valued and desired avocados
- Advocate for, and engage with, the industry
- Support industry strategy through research and outreach
- Cultivate organizational excellence and demonstrate the effective use of resources

Your Board believes these remain our strategic priorities today and that the Key Industry Aspirations specified in the Succession Plan also haven't changed:

- An assured place in the market
- A price to growers that is both premium to the competition and fosters grower sustainability
- Consistently high-quality production
- Highly productive and efficient growers
- Production stability from year to year
- Socially responsible practices
- Leaders in innovation
- Positive consumer perceptions about our brand

With this Succession Plan as our foundation, Jeff Hodge and Gwen Sabo hit the ground running late last year. First, they conducted numerous stakeholder interviews with current and past Board members, CAC's vice presidents, handlers and other growers. Over the holidays, they leveraged their network to develop an initial list of both internal and external candidates for presentation to the Succession Task Force. Since



Rob Grether

then, the Task Force worked with the recruiters to review resumes, narrow the candidate list and then conducted multiple rounds of interviews with numerous candidates — first on Zoom and then in person.

While I can't yet share with you our selection, I can share this: there are many very talented, highly experienced, and natural leaders who were genuinely excited about the opportunity to lead the California Avocado Commission. It has been a truly humbling experience. We have had the privilege of interviewing candidates from a wide variety of industries, candidates with deep knowledge in relevant verticals, and candidates with innumerable professional accomplishments. It is gratifying for me to serve an organization — as represented by the growers, the staff, the culture, the brand, and the product — that is so attractive to so many extraordinary people. We have a lot to be proud of at CAC. We have a lot to look forward to at CAC. Stay tuned. 🍊

A handwritten signature in blue ink, appearing to read 'Rob Grether'. The signature is fluid and cursive.



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A Preview of Spring and Summer Marketing

To encourage demand for California avocados among the consumer sector and build preference and loyalty for the fruit among the trade sector, the California Avocado Commission creates and executes an integrated marketing program with layers of consumer and trade support. Together, the Commission's trade program, consumer advertising, public relations outreach, influencer marketing, as well as relevant and engaging social media content help generate demand for California avocados when and where the fruit is available. The following is a quick recap of early-season activity and a preview of 2022 spring and summer marketing plans.

To pique the interest of its targeted trade audiences in the pre-season months the Commission begins a robust trade marketing program before harvesting begins in earnest. The Commission launched trade media support and conducted retail and foodservice outreach in January and February (see 'Sell-In' article pages 31-32) to build awareness of the upcoming California avocado season and the promotional support CAC provides its retail and foodservice partners. As early season harvesting began, the Commission delivered support to local retailers who merchandised California avocados leading up to the Big Game and will continue customized retail programs during the season.

Targeted consumer advertising will be aligned with trade promotions — pairing demand for California avocados with their availability at local retailers and foodservice operators. For example, the mobile directions app Waze will direct targeted consumers to retail stores with California avocados available

that are conveniently located on their route. Customized retailer promotions with partners' dietitians and cooking schools also are in development, and social and digital support for foodservice operators and retailers will be offered.

CAC will continue its award-winning "the best avocados have California in them" advertising campaign featuring uplifting messaging paired with imagery evoking the California lifestyle. The consumer media plan targets avocado shoppers in California and the West who are willing to pay a premium price for the fruit. The ads and content generated for the consumer marketing program will be shared across a broad range of channels. Video ads will be placed on streaming channels including Hulu, Tremor video and YouTube. Audio ads will reach listeners on iHeart radio, Spotify and Pandora, while digital advertising and custom content will reach targeted consumers on popular channels such as The Kitchn and Food52. Peak season outdoor advertising will take place in June and July. The ShopCaliforniaAvocado.com site will ensure California avocado merchandise is available year-round for aficionados interested in showing off their love for California avocados. Social media will round out the consumer advertising program with content shared on CAC's Facebook, Instagram, Pinterest and YouTube channels. To reach a younger avocado audience, the Commission has expanded its effort and is building its social media presence with a new TikTok channel.

Consumer public relations programs complement CAC's advertising program. To generate early season demand and build awareness of the peak season, in March consumer media, influencers, retailers and trade media attended a virtual

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Digital channels continue to play a critical role in the Commission’s consumer marketing program as they provide CAC with the opportunity to engage with fans at home, on the road or in the workplace.

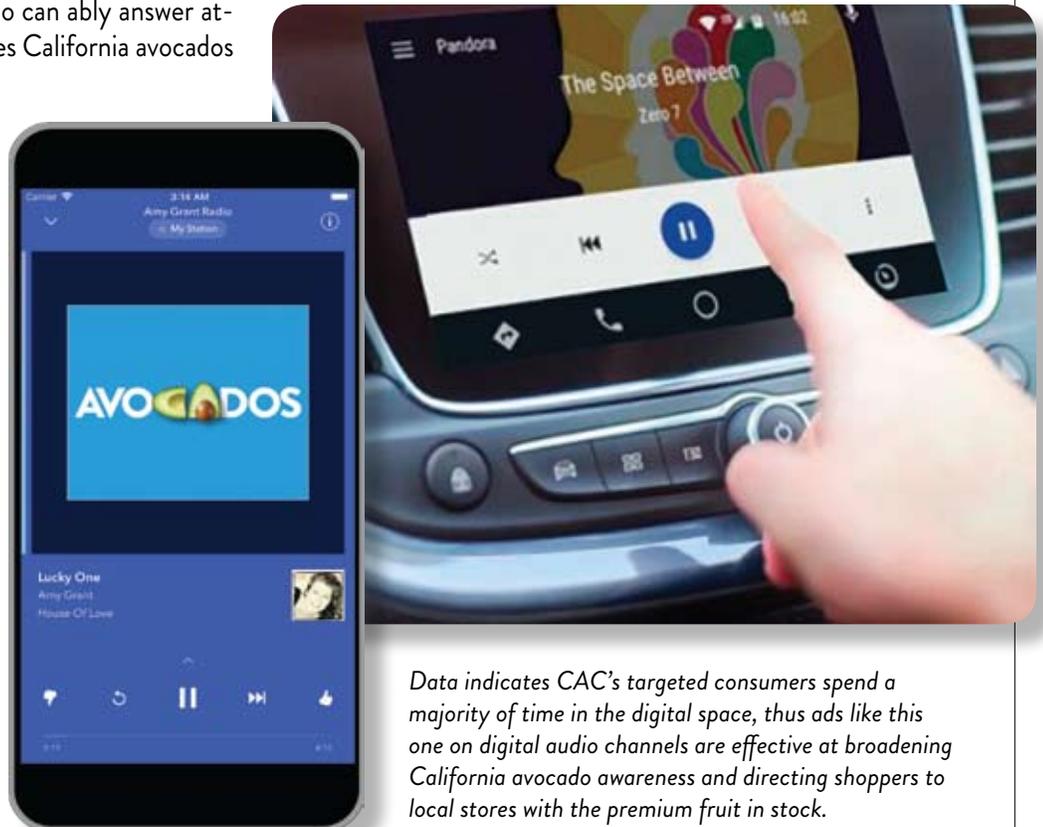
cooking class hosted by food/charcuterie board expert and food stylist Meg Quinn, who discussed the upcoming California avocado season while highlighting how the fruit can be effectively used on charcuterie boards and fruit boards.

In the middle of May, the Commission will host a California avocado grove “open house” for local media, influencers and trade guests where they will mingle with California avocado growers and CAC staff who can ably answer attendees’ questions about what makes California avocados so special. To celebrate the 10th anniversary of California Avocado Month, the Commission will conduct broad media outreach efforts and share new recipes crafted by celebrity chef and Top Chef alum Nyeshia Arrington.

In addition, the Commission will continue working with influential brand advocates who are talented storytellers and photographers capable of capturing the premium essence of California avocados. Four registered dietitians, who have been selected for the successful Living Well Brand Advocate program, will share recipes, nutritional information and the benefits of California avocados across their digital and social channels throughout the

season. Ultimately, these combined efforts will continue to expand California Avocados brand preference and loyalty in its targeted markets (see Tracking Study pages 29-30).

Further, pending crop availability, the Commission also will support customers beyond the West, including export programs in South Korea and China. 🥑



Data indicates CAC’s targeted consumers spend a majority of time in the digital space, thus ads like this one on digital audio channels are effective at broadening California avocado awareness and directing shoppers to local stores with the premium fruit in stock.



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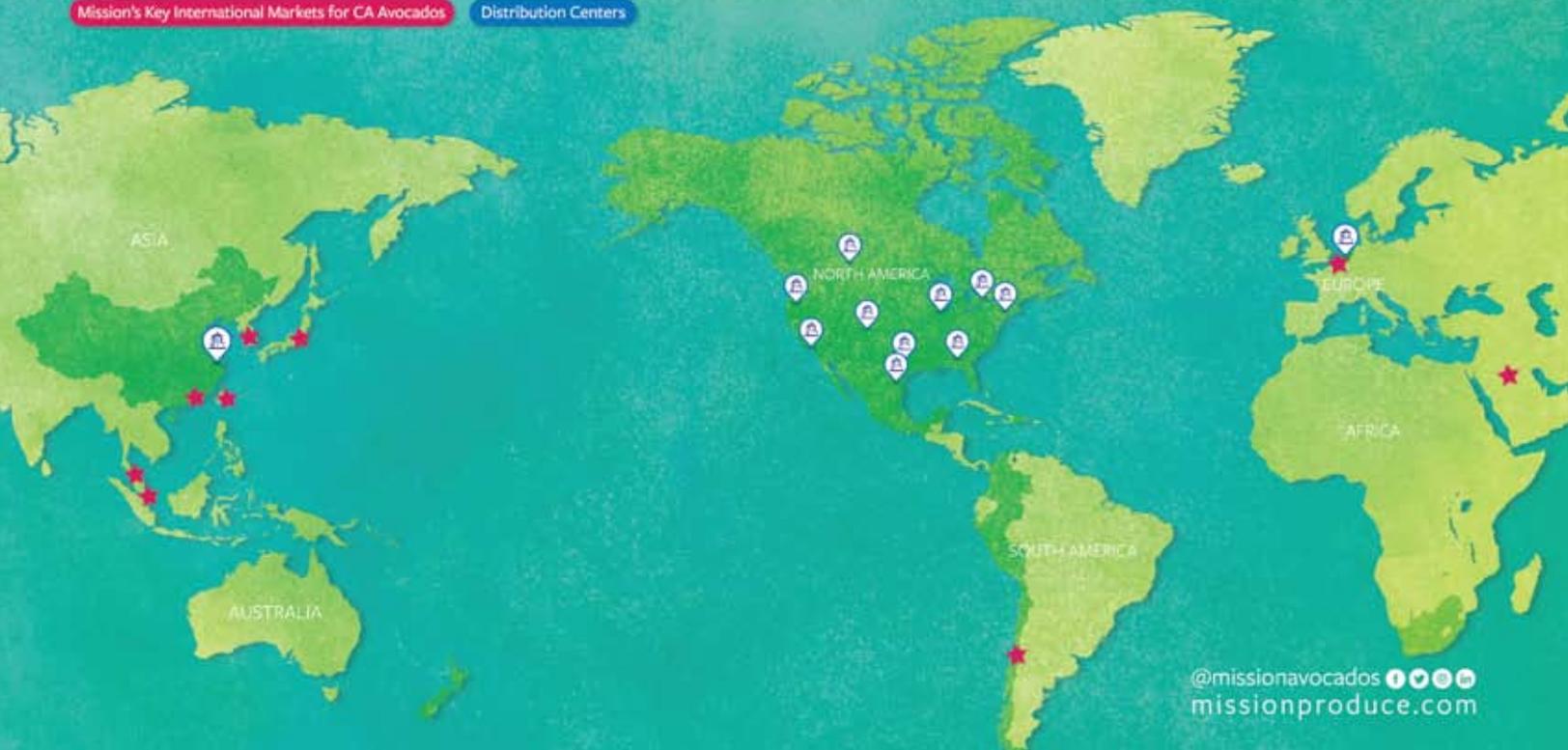
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Growing Avocados in a Megadrought

A new study published in the journal *Nature Climate Change*, led by University of California Los Angeles faculty member Dr. Park Williams, determined the Western United States megadrought — a drought lasting two decades or longer — that has been ongoing since 2000 is the region's driest period since A.D. 800! Furthermore, they concluded the current drought could continue until 2030. Their data were generated by reading tree rings from more than 1,500 trees across the Western U.S. along with recent meteorological data.

Their analysis also highlights the impacts that climate change is having on the Western U.S. — more intense heatwaves, higher temperatures, greater climate variability (think water-rich 2011, snow-laden 2019 and record warm 2021), and most of all dryness.

Managing avocados under these conditions is difficult and many growers are having to make hard decisions about their groves. While there is no ideal way to grow avocados under drought condi-

tions, there are steps growers can take to make sure that every drop of water they have is used efficiently and effectively.

Irrigation

There is arguably no more important thing to do during a drought than to service and maintain your irrigation system and its components. Your goal should be for every drop of water that enters your irrigation system — whether from a well or district water — to reach a tree by promptly fixing leaks and improving your system's uniformity. To help you in this task, most water management districts offer free water audits that will tell you about your system's efficiency and where best to make improvements specific to your situation.

There are a number of little things you can do to help improve your irrigation system's efficiency and save water. These include capping sprinklers to dead or diseased trees. If your grove has a mix of mature and young trees, change out the sprinkler heads near the

young trees to lower-flow rate heads so you are not overwatering the young trees. Consider investing in pressure compensating emitters or sprinklers. Pressure compensating emitters maintain a constant flow rate over a range of pressures as is common between the top of a slope and bottom of a slope.

You also can save water by optimizing your irrigation management through scheduling and soil moisture monitoring. To properly schedule your irrigation you should utilize an irrigation scheduling calculator tool, such as the avocado-specific one that can be found on AvocadoSource.com. This calculator has many features, such as allowing the user to adjust their system's distribution uniformity (DU) in order to see how much water can be saved by improving the system's DU.

In addition to knowing how much water to apply to your trees, you need to decide when and how often to apply this water. This is where soil moisture monitoring comes into play. Soil moisture levels have several phases,



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from saturated to the permanent wilting point. In between these phases is what is known as “plant available water.” This is the small fraction of water held in a soil that is easily available to the plant. Your goal in scheduling irrigation is to maintain plant available water levels with minimal to no periods in the saturated or permanent wilting phases. To do this, you need to monitor the soil in your grove since the plant available water content is influenced by the unique soil characteristics of your grove. For details on how to efficiently and effectively irrigate avocados see “Irrigation Management in California Avocado Groves” in the Spring 2019 issue of *From the Grove*.

Mulching

Mulching is the application of material to the soil surface without incorporating it into the soil. In their na-

tive rainforest environment, avocados are naturally mulched by leaves and other plant debris that accumulate on the forest floor. In cultivated avocado groves it is often necessary to supplement fallen leaves with other organic mulches, particularly when the grove is young. Ideally for avocados, mulches should be coarse material such as avocado trimmings, composted greenwaste or wood chips. Mulch should be spread evenly, 3 to 5 inches thick beneath the tree, but kept several inches away from the trunk.

Mulch helps to conserve water in several ways. Mulch reduces water loss due to evaporation by shading and insulating the soil surface. Mulch also helps to reduce water runoff, soil compaction and soil erosion. The combined effect is a reduction in rapid soil moisture fluctuations that help minimize plant stress. In addition, mulching helps to reduce

weed growth; weeds steal water from trees and increase overall grove water use.

In addition to these physical effects on soil moisture, mulching improves root growth. Avocado roots require a lot of oxygen and flourish in the soil-mulch interface zone. More root growth means more water and nutrient uptake that leads to improved tree health and yields.

When considering mulch sources for your avocado grove, local is best. If you have trimmings and branches from within your grove, consider chipping and using these as mulch. If you need to bring mulch in from outside your grove, it should be sourced from as near to your grove as possible to reduce the risk of introducing invasive pests. If you must bring in mulch from an unknown location, it should be composted or otherwise treated (heat, chemical fumigation) to ensure that it is pest free. Also be aware that mulches can be a source of weed seeds, particularly greenwaste. Sourcing mulch locally and knowing the source is always the best practice.

Stumping or Removing Trees

Reducing the number of trees requiring water in your grove, either by stumping or completely removing trees, is one option for dealing with drought. Stumping involves cutting the tree down to 4 to 5 feet in height, leaving about 2-foot-long stubs of the main scaffold limbs. The stumps should be immediately whitewashed with a diluted (50:50) water-based paint to protect against sunburn. Tree sealant should NOT be used on the cut surfaces; tree sealant will slow the tree’s natural healing process and keep the cut surface moist, which can actually increase the chance for disease and rot to set in. It is best to stump as early in the year as possible, generally after the trees have been harvested.

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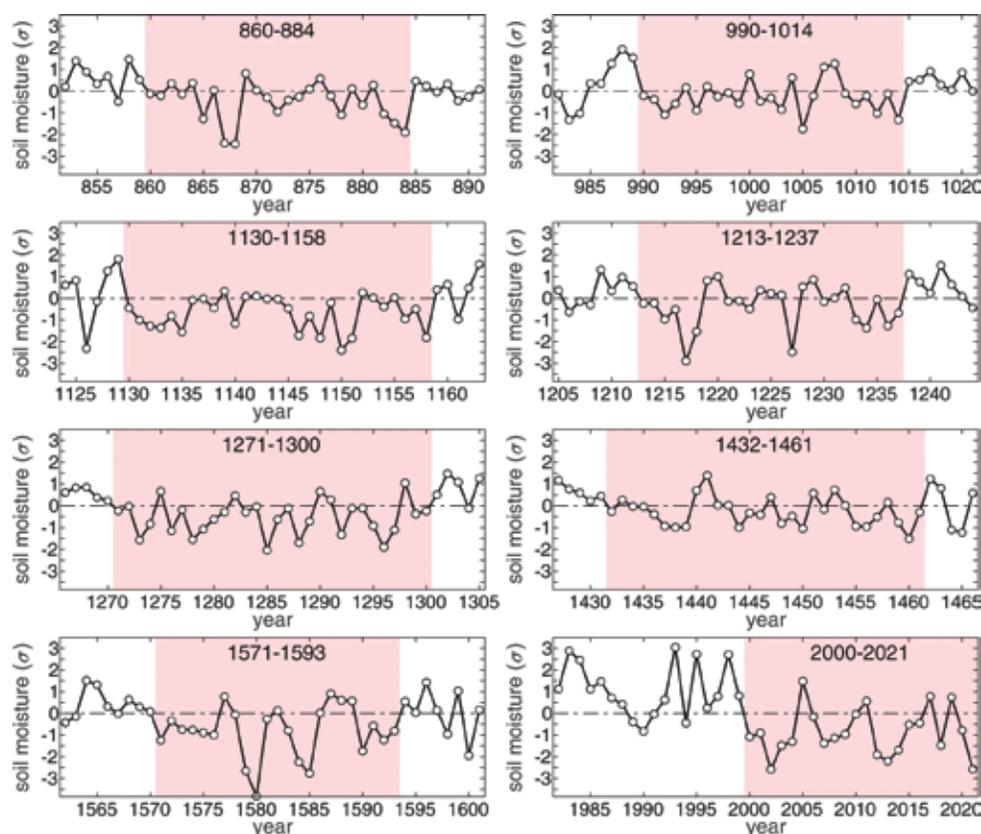
When stumping, consider stumping an entire irrigation block. This will make managing irrigation much easier because the entire block can be shut off rather than having to cap individual sprinklers. Irrigation can be shut off to stumped trees until they start to grow new foliage, usually after one to several months. When the trees start to regrow, it is important to keep the soil moist, but not overwatered. Use of soil moisture sensors is critical during this period. A stumped block will require less water for several years following stumping as the canopy of the trees regrows. Stumped trees generally will be out of production for two years following stumping, producing a crop in the third year.

Deciding which trees to stump or completely remove from your grove isn't always easy. Stumping is generally a good option if the trees are in good health, but are simply too tall and their production has begun to drop off. Completely removing a block is a better option if the trees are diseased, in poor health, or are in a problematic area that is too difficult to manage. Removing and replacing trees will obviously reduce water use for several years as the young trees grow; however, production will be lost for a longer period compared to stumping.

Another potential option that some growers may consider is topworking. Topworking trees starts similarly to

stumping, but instead of allowing the original tree to regrow, new scion wood is grafted onto the stump. This may be a useful strategy if you wish to reduce the number of pollinizer trees in your grove or if you still have blocks of green skin varieties.

There is no ideal way to conserve water when growing avocados — they are thirsty trees. However, by combining several different tactics — improving irrigation efficiency, mulching, reducing the size of very tall trees or eliminating diseased trees — each grower can make incremental improvements to their grove that will help our industry survive until the rains return. 🍷



Summer soil moisture anomalies, expressed as standard deviations from the 800–2021 mean (σ), during the longest eight extended drought events during the 800–2021 study period. The pink background bounds the years of each extended drought event. The horizontal dotted black line represents the 800–2021 mean. For the first seven droughts shown, soil moisture anomalies come from the study's tree-ring reconstruction. For the final drought (2000–2021), anomalies come from the observation-based record. Image from: Williams, A.P. et al. Rapid intensification of the emerging southwestern North American megadrought in 2020–2021. *Nat. Clim. Chang.* (2022). <https://doi.org/10.1038/s41558-022-01290-z>

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This foodservice recipe for Smoky Grilled Caesar Salad with California Avocado shows restaurant chains how they can start with a known dish and add a California-style twist that takes the menu item to the next level.

Cooking Up New Recipe Support

Eating an avocado plain or with a little salt is a perfect way to enjoy a California avocado — no recipe needed. While plain is good, the fact that avocados are extremely versatile creates demand-building usage opportunities 24/7. For this reason, recipes using California avocados are a key component of the California Avocado Commission’s marketing toolbox, providing inspiration to consumers and customers with new usage ideas and encouraging them to buy more. Commission recipe work happens year-round, and new recipes are created annually to support seasonal marketing programs. It’s important to note that the recipes don’t stand on their own, they are part of public relations outreach, advertising, brand advocate communications and trade partner programs that include California avocado messaging. Many include calls to action to seek out California avocados in season or look for California on the label or menu.

Each year in the pre-season, CAC’s Marketing team (in-

cluding agencies) determines what programs need recipes and then provides direction to a range of recipe developers. This direction includes brand guidelines, topics and themes as applicable. CAC often works with well-known chefs who sometimes also act as spokespersons for the Commission. In 2022 these will include food stylist and author Meg Quinn and celebrity Chef Nyesha Arrington.

Dietitians and nutritionists, including influencers who are part of the Commission’s Living Well Brand Advocate program, also develop recipes using California avocados. Popular bloggers and social media influencers create innovative recipes and photograph them for use on their own social channels. Custom content creation media partners that are part of the Commission’s advertising program furnish unique California avocado applications too. These recipe developers provide concept ideas to CAC, and after receiving input they get to work in their kitchens to bring the ideas to life. For widely distributed recipes such as those used in consumer public



Living Well Brand Advocate Elizabeth Shaw, MS RDN CPT, came up with a flavorful, nutritious recipe for California Avocado Granola Bars. The CAC team enjoyed the bars very much and collaborated with Shaw on a second, more indulgent version of the recipe, California Avocado Sticky Toffee Bars.



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This Sesame Seared Ahi Tuna and Grilled California Avocados dish utilizes simple grilling techniques to create an impressive entrée. On [CaliforniaAvocado.com](https://www.californiaavocado.com) CAC calls out these recipe nutrition highlights, “high potency of dietary fiber (107% DV), protein (146% DV), plus B Vitamins; B5 (100% DV), B3 (330% DV), B6 (190% DV) and B12 (200% DV)”.



Brand advocates develop recipes targeted to reach consumers who are looking for ideas of high interest. With shoppers interested in reducing food waste, Beth Brickey created this No Waste Broccoli & California Avocado Soup.

relations outreach the Commission tests the recipes for performance and obtains nutrition analysis from an independent laboratory. With that data CAC can promote certain recipes as having nutritional attributes that consumers seek, such as low sodium or high fiber.

Oftentimes, recipes created by spokespersons or partners are featured on their own digital channels, reaching consumers via advocates they trust. Other times, CAC distributes recipes as part of a press release or other outreach or shares the recipes via retailers to support California avocados in their promotional programs. All of these methods are useful for introducing new users to California avocados and encouraging increased usage among present purchasers.

To keep content fresh and satisfy fans on the Commission's consumer website, many of these new recipes are added to CaliforniaAvocado.com throughout the year. This recipe content plays a very important role in attracting website visitors. Visitors to the recipe pages on CaliforniaAvocado.com averaged more than 32,000 per month during fiscal year 2020-21, and from November 2021 through January 2022, 44% of all visits to the website were to the recipe pages. The CAC team regularly reviews the website's recipe content, removing recipes that seem dated or that underperform, adding "back

end" data to help search engines find the recipes, and making sure fans can discover new California avocado ideas.

On the foodservice side of the business, CAC's team targets foodservice operators with the goal of inspiring them to include California avocados on their menus in season. The team works with chefs and restaurants to obtain recipes of menu items that include avocados and then showcases these recipes in editorial articles for foodservice audiences. For example, if an article is about global cuisine, the foodservice team will offer the publication photos and recipes of ethnic dishes with California avocados to be included in the article, many times offering to set up an interview with the chef or restaurateur. The inclusion of the photo and recipe in the article demonstrates the versatility and value of California avocados on foodservice menus and how chefs are using California avocados to regionalize a dish.

CAC's foodservice team also uses recipes to create inspirational sample menu dishes at trade events that demonstrate the ease with which other restaurants have incorporated California avocados on the menu. Recipes targeted to chefs also are featured in the foodservice section of the Commission's consumer website. 🥑

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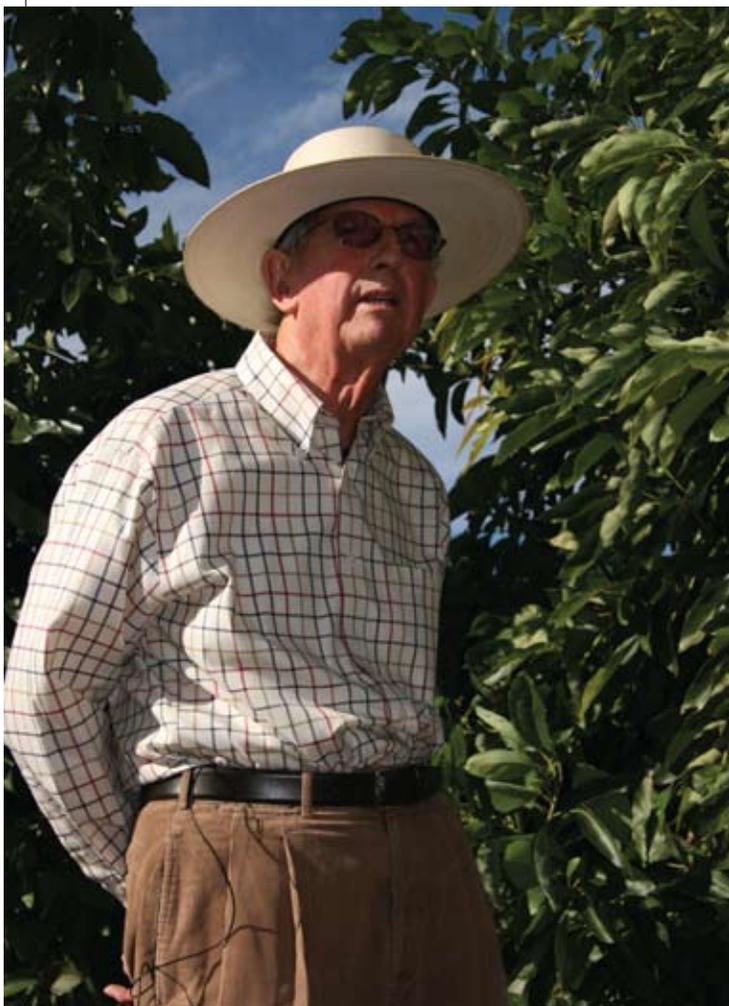
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Grower Profile



A Gentleman Farmer Passes On James Lloyd-Butler (1925-2022)

By Tim Linden



James Lloyd-Butler, a Ventura County farmer extraordinary with a rich background steeped in California history, died at the age of 96 in late January while still an active participant in the very successful agricultural ranch he nurtured for many decades.

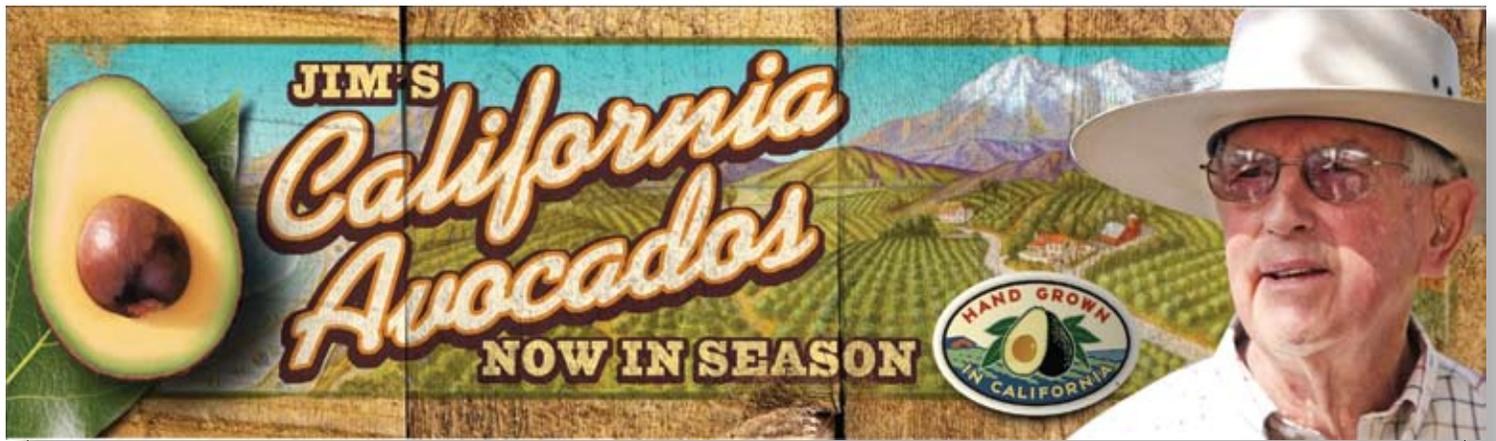
“He was an excellent farmer,” said Roger Essick of Essick Farm Management who knew Mr. Lloyd-Butler for more than three decades, and personally helped manage his ranch for the first decade and a half of this century. “I managed it alongside of Jim. He was always very much involved and was there every day.”

Essick called Mr. Lloyd-Butler “a very practical grower who would think through every change. And if he made a change, he would stick with it. You’d call him ‘open-minded’, which is a very rare trait for old farmers.”

And Essick said it served him well as his ranch, which included avocados and citrus, was one of the top performers in Ventura County. “I’d say it was right at the top.”

The longtime farm manager said Mr. Lloyd-Butler was open to any idea that helped improve his grove from new varieties to new pruning techniques to new crop inputs. “If he started something, he’d stick with it and reap the benefits. He was a big believer in mulch and the benefits he reaped were incredible.”

James Ormonde Lloyd-Butler was born on December 15, 1925, in Oxnard, CA, at St. John’s Hospital and lived most of his life within a short drive of that location on a ranch that was originally Rancho Santa Clara del Norte, a 14,000 acre



Mexican land grant dating back to 1837, and occupying much of the Oxnard Plain. Mr. Lloyd-Butler's ancestors acquired their part of the property in 1864, and it passed down to him and his brothers, Pat and Shane, through their mother Ida Ross Lloyd-Butler. She became the principal heir in 1908. Mr. Lloyd-Butler grew up on the ranch picking walnuts, which at the time was a major Ventura County crop. After graduating from Santa Clara High School in Oxnard, he joined the Navy and served as a radioman in the Pacific theater during World War II. After the war, he earned degrees from St. Mary's College in Moraga and Cal Poly, Pomona.

In the late 1950s, Mr. Lloyd-Butler and Cynthia Dolores Marsh were married and settled into life in Ventura County. He initially worked as a superintendent on another farm but eventually took over duties at the family farm in the mid-1970s as his father's health was waning.

Son Thomas Lloyd-Butler said from the mid-1970s until just a few months before his death, his father managed the family ranch owned by the three wings of the family. Once James took over the reins, he endeavored to modernize the operation by trying new farming practices and upgrading all aspects of the operation from crop sectors to varieties to the irrigation system.

Though avocados were grown on the ranch as early as the 1950s, Tom said his father experimented with new varieties and greatly enhanced the avocado portfolio. Tom noted that his father was one of the first growers to experiment with the GEM variety. "My father had a tradition of innovation. He had studied entomology and was very interested in bio-diversity. It resonated with him."

Tom recalled a bee habitat project his father worked on in collaboration with Dr. Gordon Frankie of UC Berkeley. That project is still alive today, supporting 126 species of native bees found on the ranch. "If it wasn't for people like him, we wouldn't have made the progress we had," Frankie was quoted as saying in another publication's tribute to James Lloyd-Butler.

Tom recalls that his father was always welcoming other

growers and researchers to the property, willing to both learn from them and pass on his own learnings. Like the farm manager Essick, Tom pointed to his father's love of mulching, which he used to improve the soil and reduce water usage. "He also used cover crops," he said. "He was always wanting to conserve soil. He was a believer in regenerative agriculture."

Ben Faber, a University of California Cooperative Extension (UCCE) specialist for Ventura County, also had a long relationship with Mr. Lloyd-Butler. "He was a wonderful guy," said Faber. "He was a really good person always willing to hold field workshops."

In fact, on his passing, Faber wrote a piece for the UCCE newsletter that he titled, "A Fine Farmer Passes".

Faber worked with Mr. Lloyd-Butler on many different crops including avocados, Meyer lemons and litchis over the years. In the tribute to this fine farmer, he wrote: "He was a great gentleman who loved learning, had a great love of family and was one of the best, if not the best farmers in Ventura County."

Jan DeLyser, vice president of marketing for the California Avocado Commission, used similar words with the same thought when describing her interactions with Mr. Lloyd-Butler. "He was such a gentleman. He had an impeccable ranch and was always willing to give."

DeLyser recalled that CAC filmed much of its footage for the "California Hand Grown" campaign on his ranch, as he was always willing to share his time and his property for the betterment of the industry.

Of his father, Tom Lloyd-Butler said: "He knew what his values were, and he lived them with a tremendous amount of consistency."

Twenty-nine-year-old John Lloyd-Butler, the grandson of James and son of Tom, had much opportunity to interact with his grandfather over the years. Like his father, John spent summers working on the ranch and learning about agriculture from his grandfather. In fact, he has made it his career as he currently works in ranch management for Brokaw Nursery, which is in Ventura County fairly close to the family ranch.

“I spent a lot of time with him over the last four years,” John said, speaking of his grandfather’s farming skills. “For starters, he looked at the ranch from the finest detail. He looked at every tree. He had the unique ability to walk the grove and notice any change on a per tree basis.”

The younger Lloyd-Butler said his grandfather certainly slowed down over the years, but he still had a sharp eye for detail and was very much involved in the business end of farming. “Four months ago, he was working on some invoicing and asked my wife to check his math when we went over there. It was still spot on.”

He revealed that asking someone to check his work was true to his philosophy. “He believed in the Ronald Reagan saying... trust but verify.”

John is very grateful that he was introduced to farming by his grandfather and is very appreciative that his family has kept the ranch and has been active in agriculture for more than 150 years.

Tom Lloyd-Butler agrees and said his father’s stewardship will allow his family to continue its legacy in Ventura County.

He noted that while his father managed the ranch for the family for the past five decades, the next generation, including himself and his cousins, are getting involved and sharing the load. Though Tom lives in San Francisco and is in the financial industry, he has been more involved in the ranch in recent years and expects to take an even more active role as the result of his father’s death. He said other members of the extended family are like minded. “My father made the ranch more profitable and more productive, and his brothers were very supportive of his operational skills and vision.”

Thomas said the next generation has many different skill-sets and members of the family are interested in helping in a variety of ways. As they move forward, he expects the decision-making process to be a collaborative approach...with avocados continuing to be a cornerstone of the farming interest. Currently, the ranch has about 150 acres of avocado trees in production.

James Lloyd-Butler was predeceased by his wife Cynthia of 59 years in 2016 and his daughter, Camila, who died of cancer in 2018. 🍷



Jim and his team, the Romo Brothers: (L to R) José Romo, Ramiro Romo, James Lloyd-Butler and Arturo Romo (foreman). The Romos have worked on the ranch for 40 plus years.

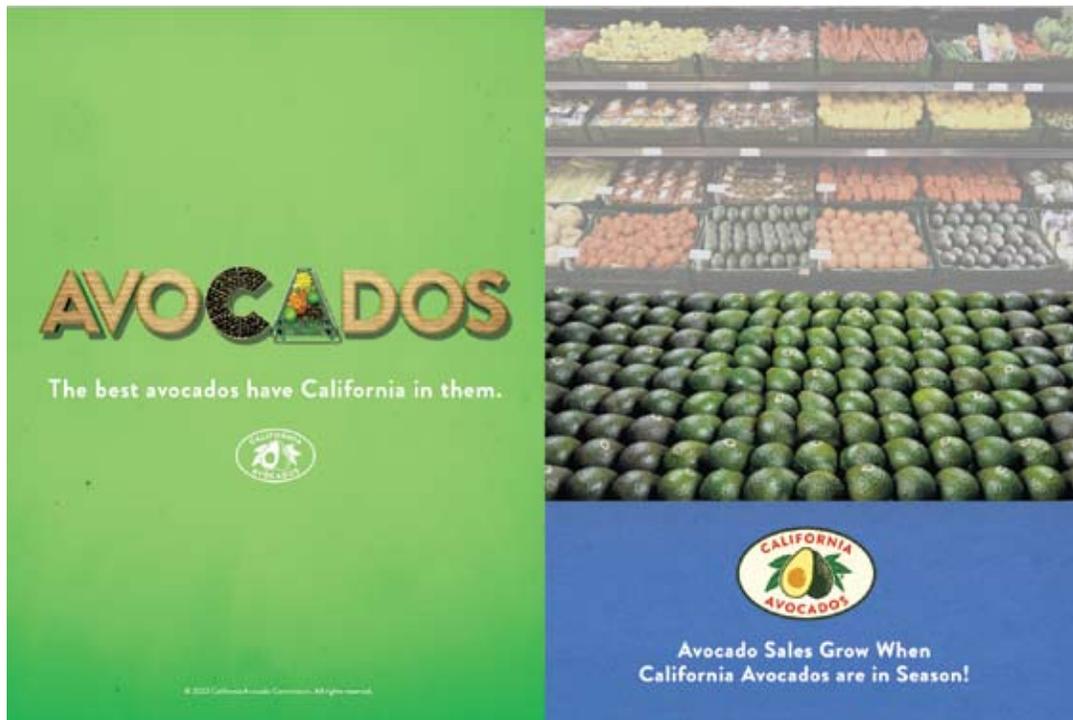


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2022 Trade Advertising



A two-page spread in the February issue of the SNACK magazine launched the season.

To keep California avocados top-of-mind with targeted retailers and foodservice chain partners leading up to and during California avocado season, the California Avocado Commission advertises in trade newspapers, magazines and digital publications. These ads help “sell” the Golden State fruit to the decision-makers who determine if and when to merchandise California avocados on their store shelves or include them on restaurant menus.

Retail Trade Advertising

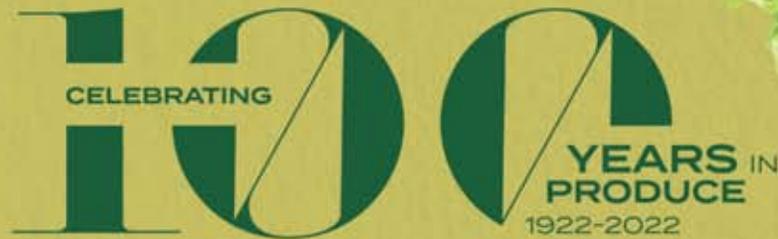
CAC’s retail trade ads are targeted to retailers, wholesalers, growers, shippers, wholesale clubs, buying brokers and the buying side of the industry to help secure distribution of California avocados and support their sales. In 2022 these trade ads are utilizing the current ad campaign creative and tagline, “the best avocados have California in them.” The campaign started in February, runs through July and may include ads in October in *The Packer* and *The Produce News* to support the

Commission’s activity at the newly named The Global Produce and Floral Show (formerly PMA Fresh Summit).

With a seasonal crop, it is important that buyers and decision makers are reminded of the high demand for California avocados from consumers, the sales lift and increased dollars that can be generated when California avocados are available. The retail trade media plan is estimated to generate nearly 37 million impressions with 34 million generated from digital ads and the remaining from print ads. The media plan has broad reach and frequency pre-season and during the season with 711 “insertions,” keeping California avocados top-of-mind with key decision-makers.

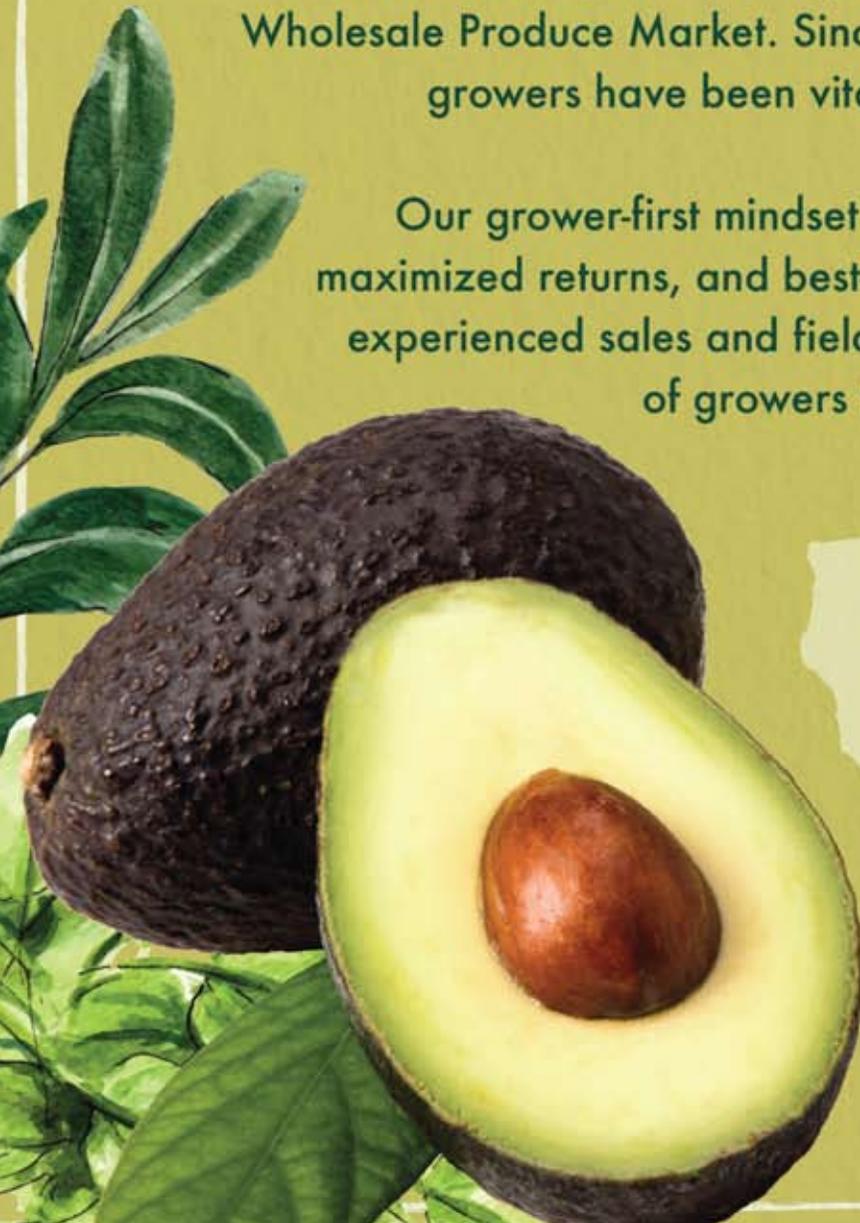
This season kicked off with a two-page spread in *the SNACK* magazine. A vellum piece was used as an overlay on the right-hand page of the spread. The ad featured California avocados in a grocery store setting with the headline: Avocado Sales Grow When California Avocados are in Season! Once the vellum overlay is turned over, statistics including weekly dollar sales, customer preference and increased sales velocity show

Giumarra



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Dalton Dowhan (951) 553-0834

VENTURA, SANTA BARBARA & SAN LUIS OBISPO COUNTIES

Abel Galvez (805) 798-7404

Pete Bastone (805) 469-0398

retailers how they can increase sales with California avocados.

In addition to running full-page print ads in *the SNACK* magazine during the season, CAC will run ads in *The Produce News* and *The Packer*, which both featured California avocados in their March issues, as well as *Fresh Digest* and *Produce Business* magazines. The *Produce Business* Masters of Merchandising March issue featured a full-page ad along with a full-page editorial. The editorial highlighted the Commission's marketing programs for 2022 that are designed to increase retail sales and drive consumers to stores that merchandise California avocados. This and other trade ad content encourages buyers and store produce personnel to stock the fruit in season.

The digital campaign is a mixture of email ads, trailers, a video sponsorship, wrap-around website ads and a podcast. Digital ads will run in *The Packer*, *PMG Fresh*, *The Produce News*, *Blue Book Produce Reporter*, *Supermarket Perimeter*, *Fresh Plaza*, *AndNowUKnow*, *Winsight Grocery Business* and *The Shelby Report*. A variety of ad sizes will be utilized to fit various applications including desktop, website and mobile. The digital ads link to the retail page on CaliforniaAvocado.com, which includes an infographic about how avocado sales grow when California avocados are in season. The infographic shows an increase in dollar sales, preference for California avocados and an increase in sales velocity.

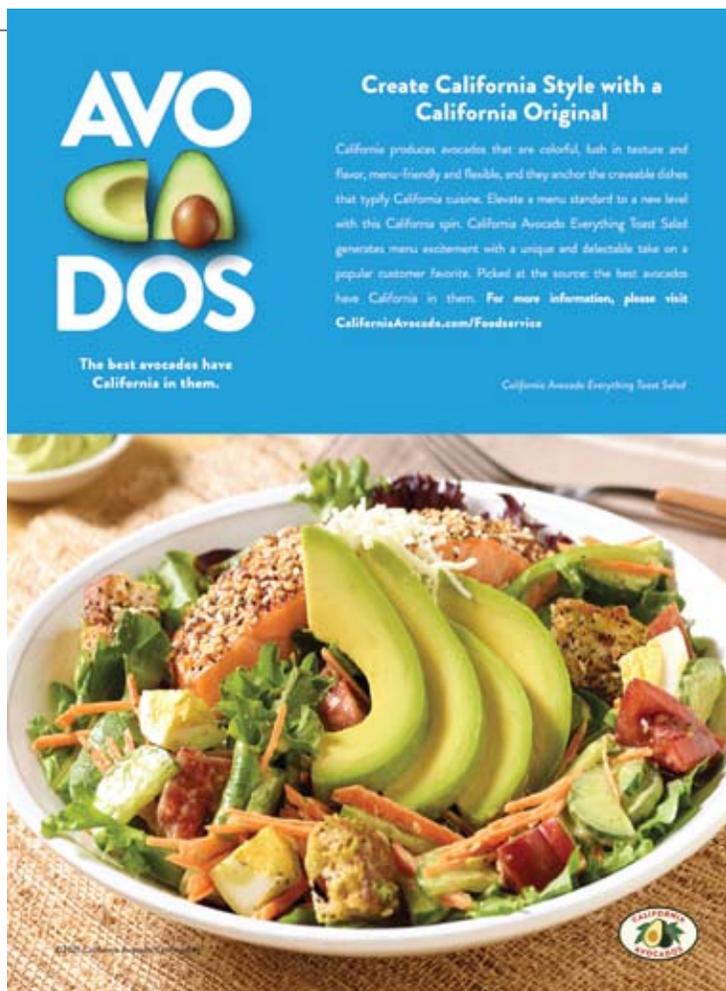
A podcast is scheduled for June and will feature an interview with CAC Vice President Marketing Jan DeLyser from an editor at *Winsight Grocery Business*. Podcasts are a popular messaging platform for the target audience, and CAC tested their use in 2021 with favorable results.

In addition to the paid advertising campaign, CAC secured \$180,000 in added value (free) advertising based on frequency purchases and the Commission's long-standing relationship with many of the trade publications.

Foodservice Trade Advertising

The Commission also uses trade advertising as one tool to reach potential foodservice chain partners — primarily menu decision-makers in the culinary, marketing and purchasing divisions in quick-service, limited-service and full-service restaurants in the west. The ads integrate elements of the consumer California avocado advertising campaign with an emphasis on culinary/food execution. They reinforce preference for California avocados and promote the benefits of including them on the menu in season. Integrating with the consumer ad campaign and retail ad campaign, the foodservice ads also feature the tagline, "the best avocados have California in them."

In 2022, digital and print ads launched in March and April, respectively, to inspire restaurants to incorporate California



Print ad appearing in *FSR*, *Flavor & The Menu* and *Plate* magazines between April/May through July/August.

avocados wherever possible. Digital ads are used to maintain off-season awareness of California avocado messaging throughout the year, whereas print ads, newsletters and slide galleries are scheduled during the months of peak California avocado availability to emphasize seasonality and patron preference.

California avocado print ads are scheduled for *FSR* (Full Service Restaurant), *Flavor & The Menu* and *Plate* magazines between April/May through July/August. Digital ads began in February in *Recipe Watch*, *Nation's Restaurant News* and *Recipe Report*. In March, digital ads also started in National Restaurant Association SmartBrief. Other foodservice advertising support includes *NRN Slide Gallery*, a banner ad in *Plate* "From the Editor" newsletter, and five different ad sizes rotating in May on GetFlavor.com.

Foodservice trade advertising is planned to continue into September, pending crop availability. In total, paid foodservice ads and value-added placements are expected to deliver more than 1.8 million impressions to encourage demand for California avocados among the target audience. 🥑

Micropropagation of Avocado in California

Because avocado trees are a clonal crop — produced from a single source through asexual reproduction — the market is dominated by just a few varieties and rootstocks. The lack of diversity in the trees' genotype can make them susceptible, as a group, to emerging pests and diseases. Further, avocado clonal propagation is very slow and labor intensive, which places limits on the trees' availability and increases the costs of new trees. To address these challenges, the California Avocado Commission partnered with The Huntington Botanical Gardens to explore how clonal micropropagation can be improved in order to increase plants' availability and decrease their cost.

The Huntington recently released its final report, "Opening Roads for Micropropagation of Avocado in California," to the Commission. The report,

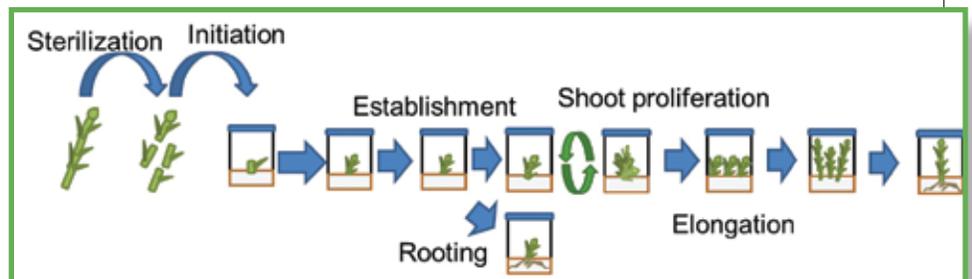


Figure 1. An illustration of the avocado micropropagation system developed by the Huntington Botanical Gardens. Illustration by Dr. Raquel Folgado, HBG.

which outlines tissue culture protocols developed during the three-year project, can be found online at: CaliforniaAvocadoGrowers.com/sites/default/files/California-Avocado-Commission-Avocado-Micropropagation-Final-Report.pdf. Below is a summary of its findings.

During the past three years, researchers carefully examined each stage of the micropropagation of avocado,

including rootstocks, cultivars and wild relatives. Avocados are very sensitive to tissue culture conditions. During the course of their research, they determined the development of optimized tissue culture protocols for different avocado varieties and rootstocks can shorten the propagation cycle, which could positively impact the California avocado industry.

The avocado micropropagation



Figure 2. In vitro avocado shoots at the initiation and establishment phases. Photos courtesy of Dr. Raquel Folgado, HBG.



Figure 3. *In vitro* avocado shoots at the propagation stage. Photo courtesy of Dr. Raquel Folgado, HBG.

system established by the researchers consists of sterilization, initiation, establishment, shoot proliferation, elongation and rooting. Researchers started by developing protocols to optimize the sterilization process and reduce the risk of contamination — successfully producing a surface decontamination method for juvenile and adult avocados. The researchers also discovered a new stage, which they called “establishment,” was critical to propagation. Experiments led the researchers to identifying the critical components in the medium, thus successfully creating media where avocado shoots (explants) could initiate and establish in tissue culture. At this time, more than 50 cultivars and rootstocks have been successfully established.

As concerns the multiplication stage — when small clusters of shoots develop, elongate and increase — researchers noted juvenile materials were easier to establish in culture and that the cultivar and state of the explant also played a role. Based on this knowledge, the group has successfully started the first avocado *in vitro* repository in the United States with more than 15 genotypes. The research group will continue

to secure additional avocado genetic resources.

Going forward, the team will continue to conduct research to better understand the *in vitro* rooting process of avocados and continue the micrografting trials, which produced positive

preliminary results. The Huntington, in partnership with the University of Queensland, also developed the first cryopreservation protocol for avocado clonal materials and will continue studies in an effort to establish the first cryobank for this crop. 🥑

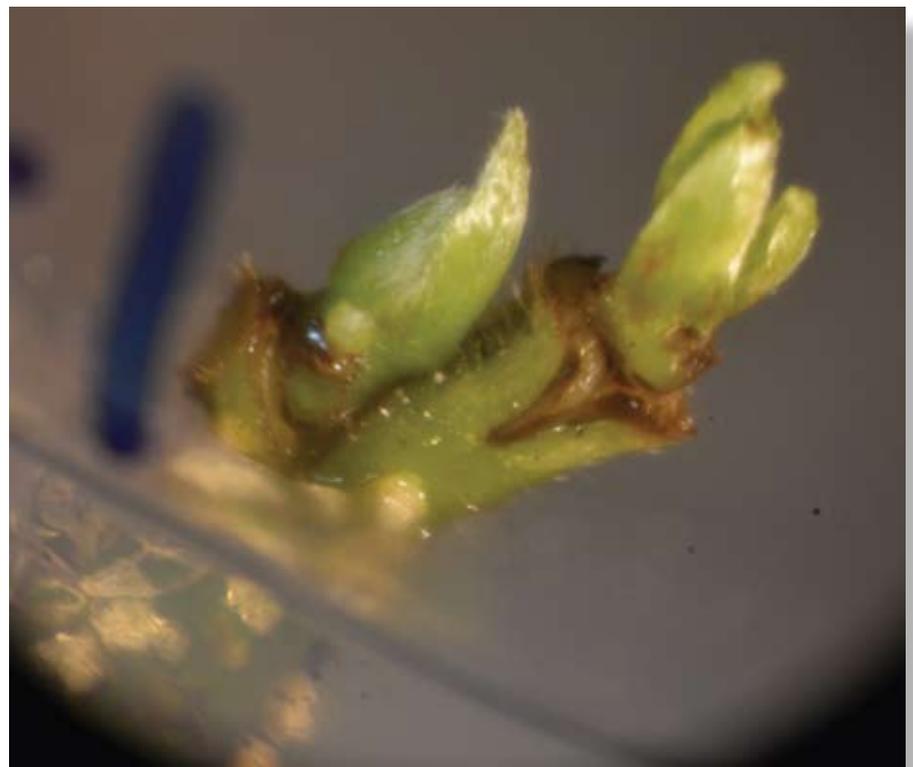


Figure 4. Examples of avocado micrografting. Shoot tips are dissected and grafted in tissue-cultured rootstocks. Photo courtesy of Dr. Raquel Folgado, HBG.

2021 California Avocado Tracking Study Highlights



Conducted regularly since the mid-1990s, the California Avocado Tracking Study helps the California Avocado Commission measure progress against some of the objectives and performance measures in the annual business plan and provides a wealth of data about perceptions among avocado shoppers. This information provides insights that guide consumer communications and support “sell-in” activities with retailers.

In 2021, surveys were conducted from August 9 through September 9, and the results were presented to the California Avocado Commission Marketing Committee in December and at the Board Meeting on February 24, 2022. Nearly 1,500 avocado shoppers were interviewed from Arizona, California, Colorado, Oregon, Utah and Washington in the West region, as well as from the Central, South and Northeast regions. From these interviews a sample also was balanced to project to the total United States. Supplemental surveys in California were conducted in order to analyze subgroups within the California market in depth.

Summary of 2021 California Avocado Tracking Study Learnings

Avocado purchasers buy avocados fairly regularly: 73% of Californians and 87% of the Commission’s “Premium Californian” target consumers say they buy avocados on at least half their shopping trips. This is an increase versus 2020 for both groups.

Awareness of California as an avocado growing region increased significantly again in 2021 to 47%, boosting overall awareness to 89%. California unaided and overall advertising awareness remains stable and at the highest levels to date. Despite an increase for Mexico, avocado advertising awareness between the two regions is comparable, which is notable because Mexico spends significantly more on advertising than California does. While Mexico’s association with all seasons increased significantly in 2021, California avocados significantly increased their strong association with summer to 79%, maintaining a big lead over Mexico.

Among avocado shoppers who have a preference for avocado origin, California continues to be the preferred growing



region among avocado shoppers in the state, the West region and in the U.S. overall (see chart). The Golden State fruit is perceived as the most premium, the best tasting, the freshest and the safest. About 74% of avocado shoppers throughout the country say it is important the avocados they buy are grown by California farmers; this is significantly higher in California at 81%. This measure had bumped up in 2020 and in 2021 it returned to prior levels.

Data indicated the importance of U.S.-grown produce and checking the fruit for the region where it was grown remain steady. Thus, encouraging consumers to check for the region where an avocado is grown remains an opportunity for differentiation. The biggest barrier to checking the region of the fruit was reported as price-based buying, with 45% of shoppers indicating they buy their avocados based on price. When checking to see what region an avocado comes from, respondents say they most often relied on the fruit's sticker.

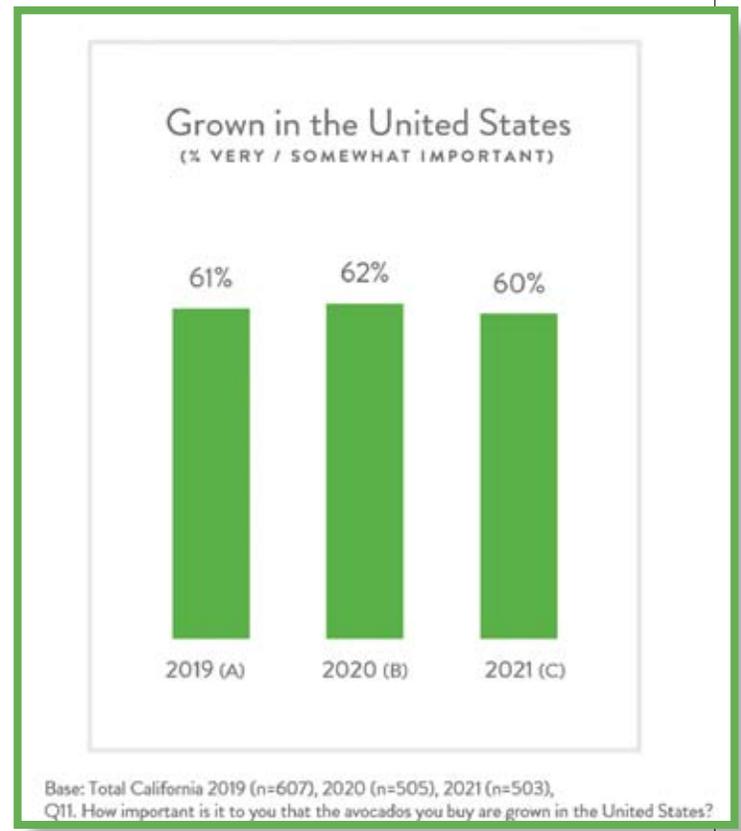
Respondents also indicated California avocados are worth paying more for and noted that safe, sustainable growing conditions – which they deemed important characteristics – are worth the price. In fact, respondents indicated safe growing conditions continue to be as important as taste. Those surveyed indicated that growers keeping the water supply safe is the biggest perceived sustainability advantage for California avocados.

The Commission shares key information from its tracking studies with avocado handlers and customers, using highlights to encourage retailers to carry California avocados in season. Understanding consumer behavior and attitudes helps the

marketing team determine how best to communicate with target consumers, which in turn encourages brand loyalty and purchases of California avocados at a premium price.

Notes on the 2021 California Avocado Tracking Study Methodology

- 15-minute online surveys
- Sample sizes: California 535, other western states (Arizona, Colorado, Oregon, Utah and Washington) about 100 each for a total of 494; non-western markets 450; for the total U.S. the sample was weighted to be representative and the sample size was 574
- Statistical significance was reported at the 95% confidence level
- Sample qualifications:
 - Age 18+
 - 60% female, 40% male
 - Primary/shared grocery shoppers who had purchased avocados in the past year
- Unless otherwise noted, results listed are for the California region 🥑



The “Sell-In”:

An Integral Part of CAC’s Promotional Effort

Each season, before that first California avocado is picked and packed and made ready for sale, the California Avocado Commission’s marketing team has contacted scores of potential buyers explaining CAC’s plans for the year and gauging their interest.

Jan DeLyser, the Commission’s vice president of marketing, revealed that the “sell-in” is the first step, and a very important element, in securing promotional support from the retailers and foodservice operators that are loyal to the California brand.

In fact, DeLyser said there are even several preliminary meetings that take place before the “sell-in” can start. “We kick off the season by meeting with the handlers and talking about our key accounts,” she said.

Those meetings, which took place virtually in January this year, gave the handler sales and marketing teams an all-important feel for the size and timing of the crop, and also provided the CAC staff a handle on which retailers and foodservice operators are most important to the ultimate sellers of the fruit. DeLyser said for the 2022 season those handler meetings proved to be very revealing. “Most of the handlers told us that growers were very interested in moving fruit sooner,” she said. “The market price [in January] was at an all-time high and some growers wanted to take advantage of that.”

And, in fact, California growers did send more fruit to market in January and February than has been the case in many years. DeLyser said the intel about an early start to the season did help the Commission kick-off a few early retail promotions in time for the weekend in which the Big Game was played. But those meetings also confirmed that the bulk – about 80% – of California’s 2022 crop is expected to be sold in the April through July timeframe. This year that crop has been estimated at 306 million pounds, about 15% greater than 2021. Securing retail and foodservice promotional support for the California avocado remains a very important factor in achieving a price premium in the marketplace.

Retail Marketing Director Carolyn Becker, who handles



One of the Big Game-themed California avocados displays at Mollie Stone’s stores in February.

many of the western regional chains that are very loyal to the California brand, said the early start to this year’s crop was a great boost for some retailers. She noted that Bay Area based Mollie Stone’s Markets ran a large Big Game weekend pro-

motion featuring California avocados. The chain has long been a promoter of the state's avocados.

Becker said she begins the promotional push each season with an early email to all her accounts giving them crop information and explaining any new opportunities that will be available this season. "In that email this year, I was able to talk about the exciting weather we have had, including a good amount of rain, which nurtured the trees and improved the size of the fruit," she said. "I also talked about the increase in volume we are anticipating on the GEM variety and the opportunities to promote that variety."

Becker said many retailers are interested in promoting a bit earlier than usual. "We already have many promotions on the books," she said in early February, noting that retailers are getting creative with the early start to promote around St. Patrick's Day and the NCAA basketball finals in March.

Though it has long been backed by tracking studies, Becker said it is always important to remind these regional accounts that consumers continually express their preference for California avocados. "They prefer the quality of our fruit and the fact that it is locally grown."

Becker reported that some retailers are beginning to take in-person meetings in their offices, others are asking for in-person meetings off-site and many who continue to prefer Zoom-type meetings.

Retail Marketing Director David Anderson focuses most of his efforts on national accounts, working with their Western divisions. He has a simple explanation of the work he and the other members of the marketing team do. "The value we add is that we help people sell more California avocados," he said.

Anderson begins his "sell-in" effort three to four months before that first avocado is picked. He said the "early engagement" is an important part of the process as it gives these retailers a sense of the crop and a glimpse at the new promotional program. While the mechanics of his efforts are similar to those of Becker, he explained that national chains are a bit different. They have more stores in each division and require more fruit for successful promotions. While many like getting into the California avocado deal as soon as they can, they typically need to wait until peak-of-the-season volume is being picked, packed and shipped.

"Most of these accounts will get in with promotions when volume reaches 10-12 million pounds per week," he said, noting he has set up several promotions slated to take place when that volume is expected in early to mid-spring.

A key facet of Anderson's "sell-in" approach is to accurately forecast the numbers and make sure there is sufficient volume. "We need to have consistent supplies for their promotions," he said.

Kim Kurata, who leads the foodservice marketing efforts for CAC, noted that this year's "sell-in" included preliminary

contact with 70-80 restaurant chains, including 12 Tier 1 chains that ran promotions in 2021. "These are repeat promoters that have been loyal to the California brand," she said. "We contact each of them to make sure they are going to participate with us again this year."

The foodservice strategy mirrors that employed at retail by focusing on those accounts excited about promoting California avocados. In fact, Kurata said it is even more a geographic play in foodservice as it is the California restaurant locations that get the most traction when pushing the "local" connection California-grown avocados bring to the table.

Over the last two years, the coronavirus has had a well-publicized impact on foodservice operations. As such, CAC's foodservice team has had to alter its strategy a bit. Kurata said promotional activities have been focused digitally rather than utilizing printed, in-store point-of-sale material. She explained that dining in has been in a state of flux since spring of 2020 with many chains relying on internet orders and take-out business. CAC has capitalized on this with online promotions on the restaurant chains' websites to push the sale of menu items featuring California avocados.

Kurata said restaurateurs are pining for the day when they can fully return to in-house dining, but they love the digital support they are getting in the meantime.

She revealed that typically foodservice operators want to plan menu promotions 12-18 months ahead of time. It is always difficult to know the size of the California avocado crop that far in advance. Now with the pandemic it is equally difficult for foodservice operators to know the dining restrictions they may encounter that far down the road, so promotion planning is a challenge.

Kurata said most of the California avocado foodservice promotions will run during the months of April, May and June when California is in the peak of its season. She noted that her foodservice clients are still operating via Zoom and other digital platforms with very few taking in-person meetings.

DeLyser added that while the many connections with the accounts are a very important element of the early work the CAC team does, the effort doesn't stop there. The pandemic has made it difficult to connect at industry events or for the Commission to hold its own season-opening events for the past two years. "But we continue to pivot," she said. "We are inviting key account representatives, in addition to media and influencers, to a virtual cooking class at the end of March and planning to have a grove open house event in mid-May if in-person events are permitted."

The longtime CAC vice president reiterated the comments of Anderson noting that helping sell the California avocado crop at a good price is the main goal of everything the marketing department does. 🥑

Early Sales Boost California Deal

With a good marketing situation in January, followed by a week-long suspension of Mexican avocados in February, California avocado shipments were well ahead of schedule as March began. In fact, by March 7, more than 40 million pounds of California avocados had been harvested, packed and shipped, causing many handlers to expect a bit of a shift in the overall supply curve for 2022.

"This year I think the peak weeks will be a little earlier, mid-April through mid-June," said Doug Meyer, senior vice president of sales and marketing for West Pak Avocado Inc. "This is due to the earlier start to the season that has already taken a considerable amount of fruit off the trees, and I anticipate there will be high demand for California fruit and great returns for our valued growers during this time frame."

Still, Meyer expects West Pak to sell California fruit all summer long and into late September/early October. "Volume will be dwindling during the late season, but we will keep specific customer programs going until the end," he said.

The California Avocado Commission has estimated this year's crop as being slightly above 300 million pounds, which mirrors West Pak's projection. "Seems about right at this early point in the season," Meyer said in early March. "We need a series of rainfall events in March to help push sizing in the groves and keep the total pounds estimate on track. What may cause lower crop tonnage is greater than estimated harvest

rates in March and April, when fruit sizing is a little smaller (lighter weight)."

But regardless of when the California fruit is marketed, he is expecting a very good season for growers. "Mexico and the import programs will not cause lower prices this summer for California avocados," he predicted. "CAC has done a tremendous job of positioning all the crop's positive attributes... premium quality and flavor, freshness, local, versatile, and dependable."

He added: "There will be continuous promotional opportunities for California avocados for the next several months. California pricing does not need to be low or cheap for it to be promoted."

One of the trends helping to drive avocado sales is bagged fruit and Meyer expects it to continue. He noted that in 2021 "bagged sales grew 27.9%, and I foresee another impressive year of sales growth in 2022."

Commenting on California's early volume, Index Fresh California Field Manager Keith Blanchard said there are many reasons to pick early including a strong market as well as the location of your grove. "There is an urgency to pick if you are in a vulnerable position," he said, talking mostly about the wind.

By early February, he said Ventura County had experienced 16 days of wind events in recent months. "That's not a pleasant experience if you are a grower."

He added that the strong market price was helping growers make the decision to pick early, and it probably

was the major reason that California growers were picking early. In February, with the market price well into the \$60s, Blanchard said: "In my 25 years in the avocado business, I don't recall ever seeing prices this high at this time of year."

He noted that the early fruit was both the result of size picking as well as the vulnerable growers stripping their groves. In either event, he said the early fruit netted a nice return. "For many, a bird in the hand is worth it," he said, adding that some growers pick some of their fruit early as an insurance policy against wind damage and/or poor markets.

But for those growers who are taking a wait and see approach, the Index Fresh executive expects a strong market for California fruit throughout the season. He said Mexico's growers appear intent on keeping the market strong by regulating the volume to a certain extent.

Turning his attention toward California's organic avocado crop, Blanchard said overall volume appears to be on the rise as a percentage of the total crop. He said growers have been pretty happy with the grove price on organics over the last few years leading to increased acreage. "We have some growers converting some groves (from conventional to organic) and there are also some new plantings of organics," he said. "Growers are continuing to get a good premium for their organic production and the market for organics seems to be less volatile."

Blanchard said the one negative in



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the current calendar year is the lack of rain after a very nice end of 2021. “We were pretty hopeful early in the season and now we have seen hardly any rain in January and February,” he said. “We’d like to see a rainy March. We need to get more rain this season.”

In late February, Rob Wedin, executive vice president of sales for Calavo Growers Inc., Santa Paula, CA, agreed that the strong marketing conditions and the one-week hiatus in Mexican shipments clearly gave a boost to California growers. Throughout February, California growers sent many more pounds of fruit to market than was originally expected.

In fact, the Calavo executive said the company did ask its California growers to consider picking fruit early to fill demand when Mexico was out of the market. In late February, Wedin reported the f.o.b. price on 48s from California was about \$64 per carton, while size 60 fruit returned \$60 and size 70s checked in at \$48. Though he did not go through his historical data to confirm that these were record prices for this time of year, Wedin said they were either all-time highs or very close to it.

Originally, the Hass Avocado Board projection page predicted California would send about 6-8 million pounds to market in February, but the final number was over 25 million pounds. California had estimated its crop to be around 306 million pounds for the season with about 80% of the volume marketed from April through July. It now appears that a larger percentage of the fruit will be sold prior to April. Wedin said if the pattern continues, shipments in late June through July will be less than predicted.

But he added that this could be a good thing for California growers who are getting excellent returns currently. The marketing situation that will present itself in late June through July may be much different as he noted that the opening of avocado imports from the state of Jalisco for the first time, which is expected to begin in late June, should put more Mexican avocados in the U.S. market. In addition, Mexico is anticipating a larger than usual summer crop from Michoacán, and Peru has estimated that it will ship more fruit to the United States in that time frame. 🥑

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