

From the **Grove**

The Latest News from the California Avocado Industry

**Commission Makes Connections
at Nation's Largest Produce Show
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10th World Avocado Congress to be Held in New Zealand Read more on Page 30



From the Grove

Volume 12, Number 4

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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.

Winter 2022

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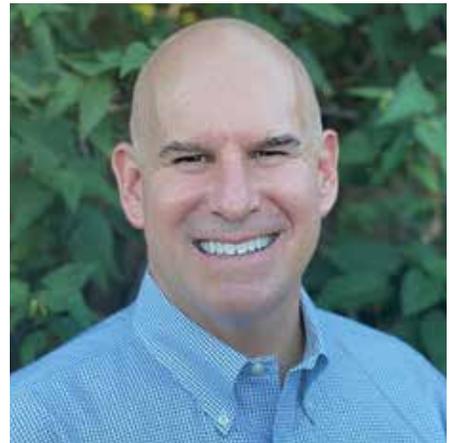
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“Success Came Because I Never Saw Obstacles”

~ Dr. Frieda Rapoport Caplan



Jeff Oberman

I'm honored to lead the dedicated team at the California Avocado Commission. During my first three months on the job, I've enjoyed the opportunity to meet growers and stakeholders throughout the supply chain, gaining valuable insight on their unique backgrounds, operations and expectations concerning my role and direction for the Commission. My travels have included visits to all five districts, in addition to the California Avocado Society's Annual Meeting in Pauma Valley. I also attended the International Fresh Produce Association Global Produce Show in Orlando, Florida, where I interacted with growers, retailers and other players in the avocado industry. My takeaway from the California visits was that there are competing opinions concerning the current 'state of the industry' and outlook for the future. Colleagues of mine in the 'Commission World' sometimes describe these visits as the 'Airing of Grievances Tour'. However, I have found this to be a 'Listen and Innovate for the Future' experience.

I was reminded at the outset of the CAS Annual Meeting by their president that they represent a voluntary dues-based organization. At the Commission, we are charged with optimizing the growers' return on assessment dollars. It is my 20+ years of service experience at United Fresh, a voluntary



Charley Wolk, Jeff Oberman and Leo McGuire

dues-based association, that will help inform the direction I take to help drive value for California avocado growers. Though we operate with the aid of a mandated budget, I'm focused on providing the same return on investment that drives participation in voluntary organizations. Every day! I greatly appreciate the input I received as we set the course for navigating the coming 2023 season.

The excitement generated by all these in-person gatherings had a different feel, as in many cases it has been close to three years since we have been able to do that. This resulted in a very well-attended IFPA (formerly PMA)

Show in Orlando that had near-record attendance. The Commission was rewarded with a prime location for our booth because of our 50 years of participation in the exposition. And that's important because this show provides a great venue to drive the California avocados' premium value positioning to retail customers, industry stakeholders and peers. The CAC team met with key customers, handlers and growers. We also gained insights from various exporters into the U.S. market by attending their respective nation's meetings held at the show.

Reflecting on these travels presents us with the ability to determine



Jeff Oberman with Samee and Ralph Foster

how we can best seize the many opportunities before us and prioritize our activities to reach our 2023 goals. Many have shared that California avocado growers potentially face a challenging year like none other. That said, it goes back to the core mission of the Commission – maximizing California avocado grower viability in today’s environment. To accomplish this task, we have put forth a plan that will increase efforts at trade (point of sale) as well as continued messaging to ensure the brand occupies an exclusive position in the minds of consumers as well as retailers and foodservice operators. An analysis of the feedback I received on industry issues led to three topics rising to the top of the list: a renewal of the focus on varieties; the need to address key issues that impact grower profitability; and the desire to research the value of sustainability programs.

Concerning varietal work, during 2023 the Commission will continue education programs that illustrate the value of legacy, current and new varieties to growers. We also will be working with buyers to explore promotional opportunities at strategic points within our marketing season for specific varieties.

The top challenges for California

avocado grower profitability are clearly water and labor. We plan to seek partners for collaboration on water and labor issues beyond produce and traditional ag to include construction, landscape management and increased engagement with local, regional and national boards.

In a similar vein, we are reaching out to ag industry sectors beyond produce for insights on their sustainability program successes that can help *tell our story* to customers, consumers and government officials, and identify potential cost savings that create a win-win scenario. I’m a firm believer in collaboration to achieve goals, and we are going to utilize this approach to maximize the effectiveness of our efforts versus a ‘go it alone’ mantra.

Yep – there is a lot on our plate for the coming year and some may say the headwinds are strong and challenges face our sector from every direction. To counter this mindset, I’m going to challenge our team and grower stakeholders to channel the late Dr. Frieda Rapoport Caplan who shared this sage advice in the 2015 documentary film “Fear No Fruit” about her life as a produce industry trailblazer: **“Success came because I never saw obstacles.”** 🥑



Board of Directors

District 1

Member/Jessica Hunter-**Secretary**
Member/Michael Perricone
Alternate/Vacant Seat

District 2

Member/John Cornell
Member/Ohannes Karaoghlanian
Alternate/Charley Wolk

District 3

Member/ Maureen Cottingham
Member/Robert Grether-**Chair**
Alternate/Vacant Seat

District 4

Member/Rachael Laenen-**Vice Chair**
Member/Jason Cole-**Treasurer**
Alternate/Catherine Keeling

District 5

Member/Will Carleton
Member/Daryn Miller
Alternate/Vacant Seat

Handlers

Member/Gary Caloroso
Member/Peter Shore
Alternate/Connor Huser

Public Member

Vacant Seat

To contact a CAC representative, please visit:
CaliforniaAvocadoGrowers.com/Commission/your-representatives

By April Aymami
Industry Affairs Director

CAC Kicks Off 2022-23 Fiscal Year Seating New Board Members and Executive Officers

In October 2022, the California Avocado Commission conducted its annual election of board officers. The CAC Board consists of 19 members and alternates, of which 15 are producers representing the five growing districts throughout California (10 members and five alternates), three are handlers representing operations that handle at least 1% of the California crop (two members and one alternate), and a public member who is appointed by the California Department of Food and Agriculture. Board members and alternates are elected for two-year terms, with half of the producer and handler member seats up for election annually. In odd years, alternate producer and alternate handler member seats also are up for election. For the 2022 General

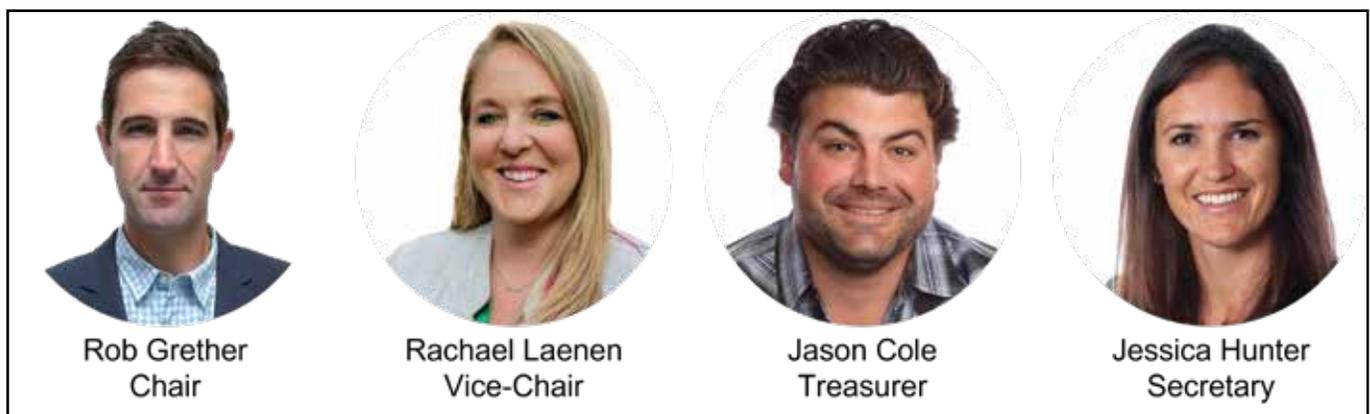
Election, one producer member seat was available in each of the five districts, as well as one handler member.

On November 17, 2022, the CFDA announced the results of CAC's 2022 General Election and seated the new board members for commencement of the 2022-23 CAC fiscal year. To the right is a summary of the results of the election, with elected members serving a two-year term (November 1, 2022 through October 31, 2024). A listing of the full Board of Directors can be found on page five. Please take note of who the current Commissioners are who represent your district. If you are unsure of which district your grove resides in, please

contact the Commission or locate your city/zip code on the following chart: CaliforniaAvocadoGrowers.com/commission/district-map.

Affiliation	Member
District 1	Jessica Hunter
District 2	John Cornell
District 3	Maureen Cottingham
District 4	Rachael Laenen
District 5	Will Carleton
Handler	Gary Caloroso

In addition to CAC's annual election, each November the newly seated board members conduct an election among their producer members to fill the seats of the Commission's Executive Committee. The following individuals have been re-elected to serve as the Commission's Executive Committee for the term ending October 31, 2023. 🍌



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Chair

Rachael Laenen
Vice-Chair

Jason Cole
Treasurer

Jessica Hunter
Secretary



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CAC Board Reduces Assessment Rate and Directs Increased Spending on Trade Activities

By April Aymami
Industry Affairs Director

At its October 20, 2022, meeting, the California Avocado Commission Board of Directors took action to approve the CAC assessment rate for the upcoming 2022-23 fiscal year, reducing the rate to 1.50% of the gross dollar value of fruit sold. The new assessment rate reflects a quarter percent reduction from the 2021-22 assessment rate of 1.75%, and will be in effect on fruit harvested from November 1, 2022, through October 31, 2023.

The approved CAC assessment rate, along with HAB assessment rebate funds, will generate an estimated \$9.9 million of revenue, assuming a crop size of 250 million pounds and an average value of \$1.35 per pound. By design, the revenue is projected to fall short of anticipated expenditures and should accomplish the goal set by the Board of reducing CAC's cash reserves balance by \$3.5 million, to a more reasonable level of \$7 million.

In addition to establishing the annual assessment rate, at the October meeting the CAC Board and management conducted an in-depth review of the proposed 2022-23 CAC budget and business plan, specifically the funds allocated to marketing programs and activities. As requested by the Board in August, CAC management presented two marketing plans based on an \$8 million and \$9 million marketing spend. The Board reviewed both plans, and

the areas highlighted by management as needing to be scaled down or eliminated to meet the \$8 million budget. The Board identified programs and activities that they believed should be fully funded, such as CAC's participation in the International Fresh Produce Association Global Produce & Floral Show, or canceled, such as the California Avocado Merch Shop. They also expressed a desire to see more spending allocated toward retail and foodservice trade activities.

In the end, the CAC Board voted to approve an \$8.6 million marketing budget with direction to management to submit a revised marketing plan for approval in November that included a budget of no less than \$3 million dollars for trade marketing activities. The final marketing plan, approved in November, allocated a nearly even split between the consumer and trade budgets, coming in at 52% and 48% respectively, whereas it had previously been closer to 60/40.

Included here are just a few of the business plan highlights for the 2022-23 fiscal year. The complete business plan and budget can be reviewed online at the following locations:

Business Plan: CaliforniaAvocadoGrowers.com/commission/accountability-reports/business-plans

Budget: CaliforniaAvocadoGrowers.com/commission/accountability-reports/finance

The Commission's Business Plan is a comprehensive document designed to

outline the diverse budgetary, marketing, industry affairs and production research objectives and strategies implemented annually in support of CAC's Mission Statement: **To maximize grower returns by enhancing premium brand positioning for California avocados and improving grower sustainability.**

The CAC Annual Business Plan 2022-23 provides California avocado growers with the following information:

- The California Avocado Commission's four priorities, mission statement and vision

California avocado industry strategic intent through 2025, including key industry aspirations, competitive advantages, brand positioning/promise, target markets, CAC's core values, critical factors for success and key performance measures, objectives and strategies

- A summary of integrated California avocado marketing programs including media, email, online, outdoor, search engine optimization and social media marketing

Continued evolution of the well-received "The best avocados have California in them" brand campaign

- Social media strategies, including content creation, further development of CAC's TikTok platform, developing cultural content in line with targeted consumers' interests and updated creative best practices based on the latest platform formats for Facebook, Instagram, Twitter, Pinterest and TikTok

- Consumer website maintenance

and initiatives: optimization based on analytics reports, enhancement of newsletter signup and the online store locator, user testing, content development

- Seasonal consumer and trade public relations such as: news bureau outreach, media tracking/reporting, the Brand Advocate program, Living Well Brand Advocate program, and chef partnerships

- Trade outreach including LinkedIn content development, retail trade advertising, photography/videography and attendance at and sponsorship of key industry events

- Foodservice marketing and outreach including foodservice chain menu development, foodservice Avo-Grove Open House with flavor pairing sessions, foodservice chain performance programs, foodservice tiered account marketing

- Retail-specific action plans including custom retail recipe development and retail marketing material development for tiered accounts

- Retail merchandising studies, including Market Trends reports, POS data and reports, AMRIC data report and Market's Analysis report

- Opportunistic export program promotions and marketing including point-of-sale support

- California avocado merchandise shop closure plan and execution (the merch shop closed on 11/30/22)

- Industry affairs initiatives and deliverables, including crop forecasting and analysis, AMRIC operations, grower and grove database maintenance, legislative and regulatory advocacy, field/technical support, sustainability project, water and labor issues, Pine Tree Ranch management, product registrations

- Grower outreach via digital and print publications, newsletters, field meetings/seminars/workshops, grower forums and field days, Food Safety manuals and grower website content

- Specific production research goals

and deliverables by topic – avocado lace bug, field testing and potential release of five advanced rootstocks, chloride

mitigation strategies, crop water use and irrigation management strategies and tool development 🍷

CALIFORNIA AVOCADO COMMISSION MARKETING BUDGET COMPARISON \$8,600,000

PROGRAM AREAS	2022-23 TOTAL BUDGETS (\$8,600,000)	
Consumer Marketing	\$ 4,736,549.00	
Consumer:	\$ 3,925,949.00	46%
Retail:	\$ 810,600.00	9%
Consumer Public Relations	\$ 440,500.00	5%
Living Well	\$ 88,430.00	1%
Trade Marketing - Retail	\$ 2,416,646.00	28%
Trade Marketing - Foodservice	\$ 725,000.00	8%
Marketing Support	\$ 182,875.00	2%
California Avocado Merchandise Shop	\$ 10,000.00	0%
TOTAL MARKETING BUDGET:	\$ 8,600,000.00	
Consumer %: 52%		
Trade %: 48%		

CALIFORNIA AVOCADO COMMISSION 2022-23 PROJECTION & BUDGET WITH COMPARISON TO 2021-22

ACCT CODE	REVENUES:	2022-23		2021-22		2022-23 vs. 2021-22		COMMENT
		PROJECTION	%	AMENDMENT #1	%	INCREASE (DECREASE)	PERCENT CHANGE	
40001	CAC Assessment Revenue	\$4,935,938	46.9%	\$6,398,438	48.8%	(\$1,462,500)	-22.86%	Assessment rate 1.50%, crop size 250 MM lbs, price \$1.35
40011	HAB 85% Rebate Assessment Revenue	\$4,940,625	47.0%	\$5,928,750	45.2%	(\$988,125)	-16.67%	
	Subtotal Assessment Revenues	\$9,876,563	93.9%	\$12,327,188	94.0%	(\$2,450,625)	-19.88%	
	Subtotal Other Revenues	\$640,750	6.1%	\$782,121	6.0%	(\$141,371)	-18.08%	
	Total Revenues	\$10,517,313	100.0%	\$13,109,309	100.0%	(\$2,591,996)	-19.77%	
ACCT CODE	EXPENDITURES: Marketing Programs	2022-23 PROJECTION	%	2021-22 AMENDMENT #1	%	2022-23 vs. 2021-22 INCREASE (DECREASE)	PERCENT CHANGE	COMMENT
51000 & 65000	Consumer Marketing	\$4,736,549	33.7%	\$5,375,000	35.7%	(\$638,451)	-11.88%	
54000	Consumer Public Relations	\$440,500	3.1%	\$785,000	5.2%	(\$344,500)	-43.89%	
54000	Consumer/Trade Living Well	\$88,430	0.6%	\$145,000	1.0%	(\$56,570)	-39.01%	
52000	Merchandising	\$2,416,646	17.2%	\$2,194,035	14.6%	\$222,611	10.15%	
53000	Foodservice	\$725,000	5.2%	\$772,500	5.1%	(\$47,500)	-6.15%	
59000	Marketing Activities Support	\$182,875	1.3%	\$112,500	0.7%	\$70,375	62.56%	
57000	California Avocado Merchandise Shop	\$10,000	0.1%	\$147,330	1.0%	(\$137,330)	-93.21%	
	Subtotal Marketing Programs	\$8,600,000	61.2%	\$9,531,365	63.3%	(\$931,365)	-9.77%	
EXPENDITURES: Non-Marketing Programs								
64000 & 65000	Industry Affairs & Production Research	\$1,587,060	11.3%	\$1,465,412	9.7%	\$121,648	8.30%	
66010	Grant Programs	\$400,000	2.8%	\$475,000	3.2%	(\$75,000)	-15.79%	
70000	Administration	\$3,466,160	24.7%	\$3,577,725	23.8%	(\$111,565)	-3.12%	
	Subtotal Non-Marketing Programs	\$5,453,220	38.8%	\$5,518,137	36.7%	(\$64,917)	-1.18%	
	Total Expenditures	\$14,053,220	100.0%	\$15,049,502	100.0%	(\$996,282)	-6.62%	
	Excess Of Revenues Over (Under) Expenditures	(\$3,535,908)	-33.6%	(\$1,940,194)	-14.8%	(\$1,595,714)	82.25%	
	Estimated Beginning Reserves - Nov. 1	\$10,922,229		\$10,412,422		\$509,807	4.90%	
	<i>Estimated 2021-22 Revenue Surplus based on Actual Prices/LB</i>			\$1,400,000				
	<i>Estimated 2021-22 Unspent Funds Returned to Reserves</i>			\$1,050,000				
	Estimated Ending Reserves - Oct. 31	\$7,386,321		\$10,922,229		(\$3,535,908)	-32.37%	

Produce Industry Icon Jan DeLyser to Retire

California Avocado Commission actively seeking new vice president of marketing

Produce industry maven Jan DeLyser announced her plan to retire from the California Avocado Commission after 24 years of service to the organization. The tentative timing for her retirement is mid-February 2023.

“Jan DeLyser is an icon in the produce industry and has been instrumental in the development of the avocado category and the premium California avocado brand,” said Jeff Oberman, president of CAC. “No doubt Jan’s family would have loved for her to retire a bit earlier; instead her commitment to California avocados, the growers and supporting the Commission through its recent leadership transition has been invaluable and appreciated.”

Jan DeLyser’s spent her entire 47-year career in the produce industry. Prior to working for the Commission, Jan held a number of positions in the produce industry, working with The Packer newspaper, the Fresh Produce Council (now Fresh Produce & Floral Council), Sun World International and Westlake Produce Inc. She joined CAC in 1998 as Merchandising Director for the Southwest Region. In 2000 she was promoted to Vice President Merchandising and to Vice President Marketing in 2003.

“As a director of the California Avocado Commission, I have had the pleasure of working closely with Jan and witnessing firsthand her exceptional leadership, creativity, and unrivaled understanding of the produce industry,” shared Rob Grether, chairman. He continued, “it is as a California avocado grower that I am most grateful to Jan for her tireless efforts over the past 24 years to not only increase demand for our state’s avocados, but to also lay the foundation for sustainable demand for years to come.”

Jan’s career was filled with mentorship and leadership. She was chairperson of the Produce Marketing Association and served on the Board of Directors of the United Fresh Produce Association (now merged as the International Fresh Produce Association). She currently serves on the IFPA’s DEI committee, represents the Commission on the Buy California Marketing Agreement as a board member and is a member of the Brighter Bites Los Angeles committee. A former chair of the Produce for Better Health Foundation and the Fresh Pro-

duce & Floral Council, Jan was appointed to the California State Polytechnic University Don B. Huntley College of Agriculture Dean’s Advisory Council in May 2021. Awards and accolades have followed from her years of marketing excellence and contributions to the industry. Honors she received include:

2016 Robert L. Carey Leadership Award at PMA’s Fresh Summit in Orlando, FL

2013 Award of Honor from the California Avocado Society

2011 Produce Marketer of the Year by The Packer

2007 Women in Produce Award of Excellence by UFPA

2003 Southern California Produce Achievement Award by the Fresh Produce Council

Recognized by Progressive Grocer Magazine in 2007 and 2013 as one of the Top Women in Grocery

During her tenure at CAC as vice president marketing, the Commission received a Marketing Excellence Award from Produce Business magazine for 11 consecutive years

“California avocados have been a significant part of my life for nearly a quarter of a century, and my entire adulthood has revolved around the produce world that I love,” said California Avocado Commission Vice President Marketing Jan DeLyser. “Now I’m looking forward to new experiences, more time with family and staying in touch with colleagues who have become dear friends.”

The Commission is actively seeking a vice president of marketing to serve after DeLyser’s retirement and advised that interested qualified individuals should send a cover letter and resumé to careers@avocado.org. 🥑





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By Ken Melban
Vice President of Industry Affairs & Operations

GEM in 2022

Across the California avocado industry, and beyond, the buzz surrounding GEM avocado continues. Recently the California Avocado Commission hosted an industry wide webinar on GEM, including a discussion with participating handlers. In early December, board and staff leadership also spent time visiting with growers, and yes, there was quite a bit of GEM discussion.

Much of the talk focused on the future for GEM production in California, and how to build the market. Throughout the industry varying views on GEM exist. While some growers are bullish on the variety, others are opting for the “wait and see approach.” With average production levels running 40% greater than Hass in 2022, and 54% larger in 2021, and comparable pricing, it is easy to see why there is enthusiasm.

But, as with every new venture, questions persist. Will the market accept a new variety? What will production look like in 10, 15, 20 years? And what about pricing?



Recently Dr. Mary Lu Arpaia organized a UC Riverside GEM field day at the Lindcove Research & Extension Center in Tulare County, with over 50 farmers present. Interestingly, only a handful of attendees were current avocado growers. The remaining attendees were interested citrus and other tree crop growers — some with hundreds of acres.

The day also included a visit to a four-acre GEM grove, all under shade. The grower’s cost was roughly \$20,000 per acre for the shade infrastructure and screen. He is hoping to get at least five years for the screen, with an expected

\$5,000 per acre replacement cost. Having grown up in Michoacán he was determined to own his own grove! Quite the pioneer, and that day his grove garnered much attention.

The California GEM industry continues to make

advancements, doubling in volume from 2.5 million pounds in 2021 to nearly 5 million pounds in 2022. Early estimates for 2023 are 6 million pounds, but some believe it may be closer to 10 million pounds or more.

As volumes increase, the discussion has shifted to market strategies. With Hass production representing 94.5% of California’s total volume this year, how do we market GEM and not negatively impact Hass? And at the current low GEM volume, with multiple packers bidding for the fruit, how do we ensure successful programs for retailers?

The California avocado industry is embarking on this GEM journey together – willingly for many, and for others, a bit unwillingly. Nevertheless, the journey has begun. It is in our collective interests’ that we navigate GEM’s future prudently. The Commission will continue to provide information on GEM to ensure growers can make informed decisions. We also will look to foster discussion and debate throughout the industry. 🥑

YIELDS				
Comparison of 2021/2022 Hass & 2022 GEM production				
	2021		2022	
	Hass	GEM	Hass	GEM
Pounds:	254,362,795	2,499,939	256,083,487	4,995,433
Bearing Acres:	45,000	287	45,000	628
Average pounds per acre:	5,653	8,711	5,691	7,955
GEM average % yield above Hass:		54%		40%



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Grower Engagement

As previously mentioned, in early December board leadership and staff visited multiple groves and talked with growers. The discussion at these visits centered on the future of the California Avocado Commission. A big part of the conversation focused on your marketing dollars and how to best utilize Commission resources to provide the best lift for California fruit. We also spent time learning about varying cultural practices in the industry. It was interesting to see growers implementing new practices, and in some instances really pushing the envelope in on-farm advancements. Areas like irrigation management, utilization of compost and spacing of new plantings were a few of the topics. Commission representatives heard from a broad representation of growers, who in total represented more than 10% of California's avocado production.

One common theme with the growers we visited is their commitment to continually reinvesting in their groves. These growers are bullish about the future of California's avocado production and firm in their belief that California has a distinct geographical advantage. No one can get to California's core market — California — before us!

As the Commission looks to conduct its strategic planning in 2023, input from the field —from the growers we represent — is crucial. We want to hear from you and welcome your ideas. Input can be provided to kmelban@avocado.org.





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California Avocado Growers & Commission Staff Earn Industry Awards

This year, the California Avocado Commission's marketing team and five California avocado growers earned three prestigious industry awards. Each award celebrated different achievements — individual career accomplishments, marketing excellence and building demand for Hass avocados through service to the Hass Avocado Board — and secured positive recognition and media coverage for the Commission and California avocado growers.

On June 30, Zac Benedict, CAC's online marketing director, was added to *Produce Business* magazine's 40 Under Forty list spotlighting an international pool of rising entrepreneurs and leaders who have shaped the produce industry and are paving the way for the future. The magazine noted, "this year's winners illustrate the strength and depth of the industry's talent — and each one has demonstrated leadership growth and keen insight into building our industry." Each of the winners was given the opportunity to discuss their accomplishments, as well as their goals and aspirations, with the magazine. Zac joins the Commission's April Aymami and Dave Cruz in being named to the publication's 40 Under Forty list. The press coverage garnered by this award is substantial. *Produce Business* magazine's print circulation, pass-along and online distribution generates more than 64,000 impressions.

Zac has progressed swiftly into a highly respected and seasoned produce marketer since he started with the Commission as a marketing intern in 2005. In his current role, Zac leads CAC's digital communications, including social campaigns, digital advertising, CaliforniaAvocado.com, and various custom communications in cooperation with targeted consumers. He also created the Commission's blog. He plays a critical role in blogger advocate communications and consumer responses, and during the pandemic his insights into the mood of the Commission's targeted audience helped guide the tone and cadence of communications.

Throughout his career, Zac has earned numerous professional achievements. He was named as one of Produce Marketing Association's Emerging Leaders in 2012 and as a PMA High-Performance Manager in 2016. He also served as a



Zac Benedict, named to Produce Business Magazine's 40 Under Forty list, in a California avocado grove.

contributor to the Know a Farmer Panel in 2012 and for the Social Media Marketing World events in 2014 and 2015.

In August, the Commission earned its 11th consecutive Marketing Excellence Award from *Produce Business* magazine. This year, the Commission was honored for its 2021 California Avocados Road Trip Videos marketing program. With more Americans taking road trip vacations, the Commission partnered with Chef Oliver English and filmed him preparing unique California avocado recipes with iconic California locations as a picturesque backdrop. The videos showcased the versatility of the fruit in a series of easy-to-prepare recipes while celebrating the pleasures of California's hit-the-road lifestyle. A summary of the award-winning campaign can be viewed at: <https://www.producebusiness.com/full-speed-ahead/>.



Hass Avocado Board “Making It Happen” award recipient Jan DeLyser with Bob Lucy of Del Rey Avocados and Steve Barnard of Mission Produce at the HAB 20th anniversary celebration in San Juan Capistrano.

In late September, the Hass Avocado Board commemorated its 20th anniversary by celebrating key individuals who played critical roles in establishing, building and helping to grow HAB programs, strategies and direction. Nominees — who were chosen by their peers — included board, committee and special sub-committee members as well as staff and those associated with CAC and other boards representing imported avocados. Five California growers who served on the HAB Board of Directors were among the “Making It Happen” honorees, including Charley Wolk, Bob Schaar, Jamie Johnson, Sal Dominguez and Scott Bauwens. Recognition of past CAC Board chair and current Board alternate Charley Wolk drew positive attention to his role in helping to establish HAB and acknowledged the role the Commission has played in ensuring avocado importers contribute to category marketing and building demand for increased supplies of avocados in the U.S.

Jan DeLyser, CAC vice president marketing, also received HAB’s “Making it Happen” Recognition Award in appreciation of the role she played in establishing HAB’s marketing program. When HAB was first established, the Commission managed all activities of the association.

After joining the Commission in

1998 as merchandising director for the Southwest region, Jan’s role expanded quickly to include leadership of the Commission’s marketing department and programs. She was named vice president merchandising in 2000 and by 2003 had assumed her current position. Throughout her tenure, Jan has remained active in industry leadership, having served as chairperson for the Produce Marketing Association (now the International Fresh Produce Association), the Produce for Better Health Foundation and the Fresh Produce and Floral Council. She has served on the Board of Directors of the United Fresh Produce Association, is a member of the Brighter Bites Los Angeles committee and the International Fresh Produce Association’s Diversity, Equity and Inclusion committee. She also represents the Commission on the California State Polytechnic University Don B. Huntley College of Agriculture Dean’s Advisory Council and the Buy California Marketing Agreement board. Her previous awards include the PMA’s Fresh Summit 2016 Robert L. Carey Leadership Award, the California Avocado Society’s 2013 Award of Honor, *The Packer* 2011 Produce Marketer of the Year award, the UFPA 2007 Women in Produce Award of Excellence and the Fresh Produce & Floral Council’s

2003 Southern California Produce Achievement Award. *Progressive Grocer* magazine recognized her as one of the Top Women in Grocery in both 2007 and 2013.

Ultimately, recognition of California avocado growers and Commission staff garners positive media coverage before a targeted industry audience that reflects positively on the California Avocados brand, the Commission and our growers. 🥑

California Avocado Commission

PROMOTION

“California Avocado Road Trip Videos”

STRATEGY

California road trips always have been popular. The California Avocado Commission partnered with chef Oliver English to take California avocados on the road to film recipes consumers can cook while traveling. In each video, the chef demonstrated the easy-to-prepare recipe.

The videos ran on Channel Factory, The Food Network, POPSUGAR, Spotify and The Kitchn. Videos also ran on Hulu on National Avocado Day. CAC also reached the target audience on its TikTok channel, which launched in April 2022. The commission worked with popular TikTok influencer Kelz (5.8 million followers) to “duet” and react to the “Redwoods” video.

RESULTS

- This series yielded 954,000 video views, 17,100 engagements (likes, comments, shares) and 3.9 million impressions on Instagram, Facebook and Twitter.
- On YouTube, these videos yielded an additional 2,100 organic views.
- The Redwoods Video, posted on the new California avocado TikTok channel, yielded 1,000 organic views and 375 engagements. When posted on TikTok influencer Kelz’s channel, this video generated 100,600 views, 12,530 engagements and yielded more than 5 million potential impressions.
- The three videos yielded more than 15M impressions and 14M views since July 2021.
- The videos also have yielded 144,000 impressions and 143,000 views on The Kitchn since March 2022.

20 / AUGUST 2022 / PRODUCE BUSINESS

The Commission’s marketing team secured an 11th consecutive Marketing Excellence Award for its California Avocados Road Trip Videos. Reprint courtesy of *Produce Business* magazine.



CAC staff in the California Avocado Commission booth

Commission Makes Connections at Nation's Largest Produce Show

The 2022 International Fresh Produce Association Global Produce & Floral Show (formerly known as the Produce Marketing Association Fresh Summit) provided the California Avocado Commission with an important opportunity to reconnect with targeted retail, trade and industry partners after a two-year in-person hiatus of the event. As the COVID-19 epidemic took root, the show was converted to a virtual presence in 2020 and was cancelled in 2021 after a hurricane hit New Orleans shortly before the show. With the return to an in-person format, this year's event was the perfect venue to introduce Jeff Oberman, the new CAC president, and showcase CAC's leadership position in U.S. and global markets.

From October 27 – 29, retailers, AMRIC handlers, industry stakeholders, associations and trade and consumer media members gathered at the Orange County Convention Center in Orlando, Florida. Although the show took place on the East Coast, which generally results in a lower attendance of

CAC's key account retailers than West Coast shows, CAC retail marketing directors David Anderson and Carolyn Becker were able to connect with Albertsons Safeway Companies, Kroger, Northwest Grocers, Sam's Club, Save Mart, Walmart and an assortment of other targeted retailers. Overall, the Commission team achieved its goal of meeting with at least 80% of targeted trade media show attendees. To thank retailers and trade media who responded to an invitation to visit the Commission's booth, CAC allowed them to select California avocado-branded merch shop gift items that were then shipped to them after the show.

In addition to retailer meetings, CAC's leadership team – including Jeff Oberman, newly promoted Vice President of Industry Affairs and Operations Ken Melban and Vice President Marketing Jan DeLyser – took advantage of the three-day event to build connections with handlers and international representatives. Oberman, DeLyser and Angela Fraser also participated in a meeting with the U.S. Depart-

ment of Agriculture. “The Commission team enjoyed the opportunity to connect in person with key industry decision makers and to ‘introduce’ Jeff Oberman in his new role as CAC president,” noted Jan DeLyser.

Members of the CAC team also benefitted from the general sessions, keynote speakers and workshops learning about trends they can incorporate into the next season’s marketing and advocacy initiatives. Further, the Commission was honored for its 50 years of exhibiting at the show’s precursor events – the PMA Fresh Summit and earlier conventions.

The Commission garnered more than 550,000 trade media impressions from the pre-show trade press release and show coverage. CAC’s combined in-person presence and media



CAC representatives Carolyn Becker and Jan DeLyser with the Safeway NorCal division team in the booth.

coverage helped spark interest in California avocados and the Commission’s marketing support programs as the team prepares for the upcoming season. 🥑

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2022 California Avocado Tracking Study Highlights

The California Avocado Tracking Study has been conducted regularly since the mid-1990s. The study helps the California Avocado Commission measure progress against some objectives and performance measures in the annual business plan and provides a wealth of information that helps the CAC Marketing team direct communications.

For the 2022 Tracking Study, from July 7 through August 7 nearly 1,400 avocado shoppers were interviewed from California, individual states in the West (Arizona, Colorado, Oregon, Utah and Washington), as well as in 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. The results were presented to the California Avocado Commission Board of Directors at their Board meeting on November 17, 2022 and the Marketing Committee on December 15, 2022.

Key Learnings from the 2022 California Avocado Tracking Study

Avocado purchasers buy avocados regularly: 66% of Californians and 74% of the Commission's "Premium Californian" targeted consumers report buying avocados on at least half their shopping trips. When choosing which avocados to purchase, consumers place two factors on par as the most important: being grown in safe conditions and expected taste.

Avocado buyers continue to prefer buying large avocados; however, in 2022 there was a directional (not statistically





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California Avocados continue to be viewed as superior vs. Mexico for “being the best” and “worth paying more for” in most Western states but are seen as comparable in the total US.



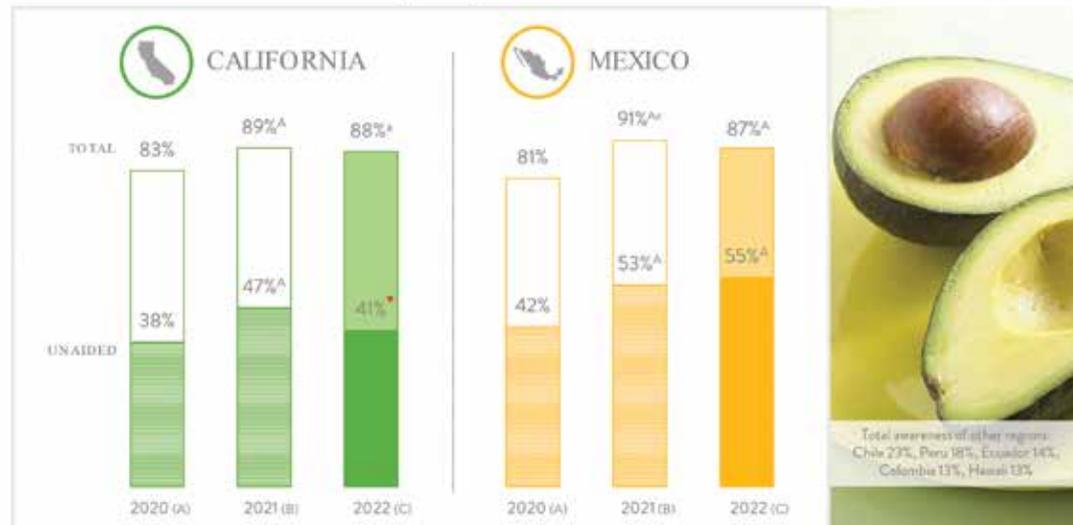
Base: Total 2022, CA (n=502), AZ (n=103), CO (n=102), OR (n=101), UT (n=102), WA (n=99), Total US (n=499)
Q1. How would you like to think about [California Avocados/Avocados from Mexico]. How much do you agree or disagree that the statement describes [California Avocados/Avocados from Mexico]?

Green percentages indicate significantly higher than 2021
▲ California significantly higher than Mexico 2022



Total awareness of California Avocados held steady and continues to be on par with Mexico.

Unaided awareness however is now lower for California than Mexico.



Base: Total California 2020 (n=505), 2021 (n=503), 2022 (n=502)
Q1. When you think of avocados, what brand names or growing regions come to mind?
Q3. Which of the following avocado growing regions have you heard of?

▼ California is significantly lower than Mexico 2022

significant) increase in preference for small avocados. While avocado buyers say they prefer to buy single avocados, regardless of size, 78% of Californians say they also buy bagged avocados. Two-thirds of respondents say they would be “a lot” or a “little more” likely to buy a bag of avocados if California was on the label.

In 2022, for the first time, Mexico is the preferred avocado origin in the U.S. overall. In recent years Mexico has been gaining consumer preference in the total country but had not yet surpassed preference for California. This development is somewhat expected considering that California avocados are usually not in distribution in much of the country outside the Western region and California marketing is focused on those targeted consumers, whereas Mexico has year-round distribution and marketing throughout the U.S.

In California and the West region, California avocados exceed Mexico and all other origins on positive product perceptions. While consumers state that California avocados are the most expensive, 59% state they are worth paying more for and 65% of Californians say California avocados are the best. About 51% of avocado shoppers in California say it is important that the avocados they buy are grown by California farmers.

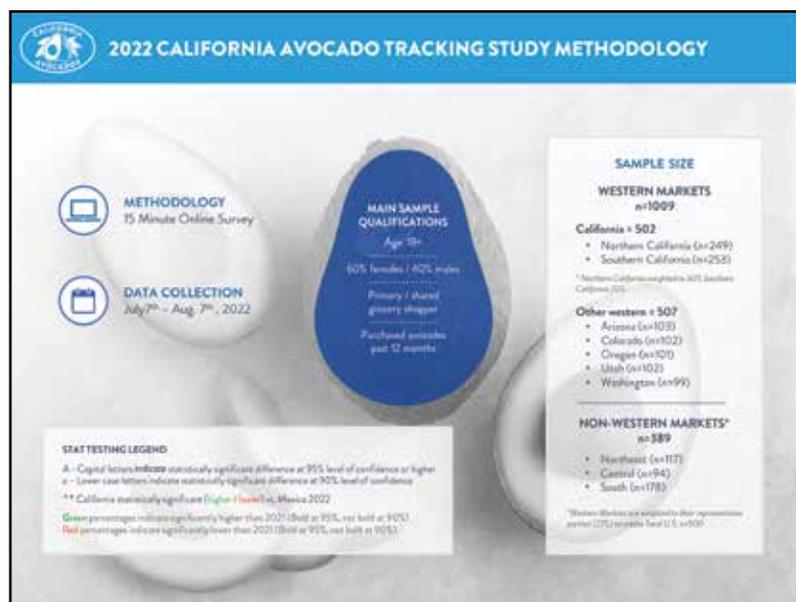
Certain sustainability factors are very important to

consumers when considering their avocado purchases. The following percentages of respondents said it is extremely or very important that:

- growers protect the water supply to help keep it safe (81%)
- harvesters and other workers are treated fairly (79%)
- growers use water responsibly (78%)

There is a gap between the importance consumers place on many sustainability attributes and the percentage of consumers who believe these statements are true for California avocado growers. While consumers’ perceptions that California avocado sustainability practices exceed those for avocados from Mexico, the percentage of respondents who associated sustainability with California avocado growers typically ranged from 50% to 60%, indicating there may be an opportunity to improve in this area.

Insights from the Tracking Study also are shared with avocado handlers and customers to encourage retailers to carry California avocados and promote their origin during the peak season. Understanding consumer behavior and attitudes helps the CAC Marketing team develop messaging that will resonate with target consumers, which in turn encourages brand loyalty and purchases of California avocados at a premium price. 🥑



Notes on the 2022 study methodology

- The surveys were 15-minute online surveys
- Sample sizes: California 502, the other Western states at about 100 each for a total of 507; non-western markets 398; for the total U.S. the sample was weighted to be representative and the sample size was 500
- 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

By Tim Spann, PhD
Spann Ag Research & Consulting

Production Research Focuses on Grower Needs

When I began working for the California Avocado Commission in 2012, the Production Research budget was more than \$1 million annually. At that time, CAC staff worked with the Production Research Committee to develop an annual request for proposals that included a general list of research priorities, but the proposals received were largely at the discretion of the researchers.

Over time, the PRC made the decision to make the annual RFP more focused, listing specific topics on which proposals were needed. And in recent years, the RFP process has been eliminated entirely in favor of asking specific researchers for proposals on specific topics that the PRC has decided are needed to address critical issues within the industry. As a result, the annual Production Research budget has been reduced to about \$200k to \$300k annually, but is focused on projects that will, hopefully, have a direct impact on growers.

Avocado Rootstock Development

The largest project — both in scope and investment — CAC is currently funding is for the development of new rootstocks. Three years ago, the PRC recommended and the Board approved no longer funding active breeding of

new rootstock selections. Rather, the decision was made to focus on evaluating rootstock selections that had been previously made but never fully evaluated.

Through discussions with Dr. Patricia Manosalva, the current University of California rootstock breeder, five rootstocks that showed promise for having phytophthora root rot and/or salinity tolerance were selected to move into commercial-scale trials to decide whether to release them commercially. The five rootstocks selected are known by their code names PP35, PP40, PP42, PP45 and PP80. The traits of these rootstocks are shown in the accompanying table.

Since 2019, these five rootstocks have been planted by growers from San Diego County to San Luis Obispo County under a range of conditions.

Each planting has at least 100 trees of one or more rootstocks. The growers selected to plant these trials have groves that exhibit one or more of the following conditions: high phytophthora root rot pressure, high chloride levels, heavy soils prone to saturation, high salinity irrigation water, alkaline irrigation water, and high soil pH.

Dr. Manosalva is preparing the patent paperwork for PP35 and PP40 with the hopes that these two selections will become commercially available to growers in 2023. The remaining rootstocks likely will be released in 2024 and 2025.

Phenology and Ecology of the Avocado Lace Bug

The avocado lace bug is an invasive pest that has been in California since 2004, when it was found infesting backyard avocado trees in the National City/



Adult avocado lace bugs and their eggs on the underside of an avocado leaf (left). Avocado lace bug feeding damage, “necrotic islands,” seen on the upper surface of avocado leaves.



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Chula Vista area of San Diego County. From the original find in late 2004 until late 2017 there was no known movement of ALB out of backyard trees in the National City/Chula Vista area. However, in October 2017 there were several reports of ALB in commercial avocado groves in the Oceanside and De Luz areas of northern San Diego County. Since then, the pest has continued to spread and is now known to be as far north as Los Angeles County. Given the new movement of the pest and its apparent change in aggressiveness as an avocado pest, the PRC began funding a project with Dr. Mark Hoddle in late 2021 to better understand the biology of this pest to help determine control strategies.

Dr. Hoddle and his team have been conducting quarterly surveys of ALB in commercial groves in Bonsall and Oceanside. Their findings to date tentatively indicate that ALB populations tend to decline in spring and increase in summer through fall. They also have observed several generalist predators—including predatory thrips, predatory mites, ladybugs, and spiders—associated with ALB populations. However, they note that none of these natural enemies are particularly numerous or synchronized with ALB populations.

Genetic analyses completed in 2005 following the original ALB finds in California found that the population in southern San Diego County was from Nayarit, Mexico. However, genetic analyses of northern San Diego County specimens indicated that this population matched populations in Florida and the Caribbean, indicating a second introduction of ALB into California. Dr. Hoddle and his team are now reevaluating the populations in southern San Diego County to determine if the original Mexican genotypes have been replaced by the more aggressive Florida/Caribbean genotypes. Additional ALB populations in Mexico have been sampled



Feeding damage from avocado seed weevil larvae, *Heilipus lauri*, on Hass avocado fruit (top). An adult avocado seed weevil (bottom). Photos credit, Dr. Mark Hoddle.

and are being analyzed to get a better impression of the overall genetic diversity of this pest.

Lastly, Dr. Hoddle and his team are trying to understand how temperature affects the development of ALB. They have conducted their own trials in the lab at UC Riverside and also have been able to access some unpublished data from a study in Cuba. Their analysis of these data shows that ALB has a minimum development temperature of about 48 °F and a maximum development temperature of about 98 °F. These data aid in understanding how temperature, in particular high temperatures such as during heat waves, will affect ALB development and survivorship.

The Avocado Seed Weevil, *Heilipus* Species

Another project currently being funded with Dr. Mark Hoddle is titled, “Proactive Management of Avocado Seed and Stem Feeding Weevils, *Heilipus* species.” This project is partially funded by CAC, with the balance of funding coming from a new initiative from the California Department of Food and Agriculture to conduct proactive research on potential invasive pests. CAC has long been aware of the invasion potential of the avocado seed weevil and this threat has been leveraged to prevent or limit the importation of avocados from certain countries.

This was a great opportunity to leverage the funding offered by CDFA

to help us develop early detection tools for this pest so that any potential introduction could be detected early and hopefully, quickly eradicated. Thus, a key component of this research is to purify, synthesize and test under field conditions the aggregation pheromone of the avocado seed weevil.

Using avocado seed weevils in the quarantine facility at UC Riverside, Dr. Hoddle and his team determined that the major component of the aggregation pheromone for this pest is a chemical named grandisol. This compound is well known as it is the major chemical in the pheromone of the boll weevil. This allowed Dr. Hoddle and his team to test their own synthesized version of a grandisol mixture as well as commercially available boll weevil lures for effectiveness in the field. Unfortunately, both failed to attract avocado seed weevils in the field in Mexico.

Grandisol exists in two different forms, which are mirror images of one another. Chemically, these two forms are known as enantiomers. Only one of these forms exists naturally, but commercially synthesized grandisol is an equal mixture of the two forms and biological systems can discriminate between the two. Thus, Dr. Hoddle hypothesizes that the “unnatural” grandisol may be causing interference and inhibiting responses to the natural enantiomer in the field. They are working with cooperators in India to produce the pure natural enantiomer of grandisol. They are planning to test this formulation in the field in Mexico in late spring or early summer of 2023.



*Oviposition holes (egg laying holes) from the avocado seed weevil (*Heilipus lauri*) on Hass avocado fruit. Photo credit, Dr. Mark Hoddle.*

Herbicides for Use in Bearing Avocado Groves

Only 10 herbicide active ingredients are registered for use in bearing avocado groves in California. Of these, paraquat is a restricted use chemical making it difficult to use. Glyphosate is under continuous scrutiny and many weed species have developed some level of resistance to it. Thus, there is a need to have more tools in the toolbox so growers effectively can manage weeds in their groves. In 2019, CAC began funding a project to evaluate herbicides currently registered for use on citrus in California for potential use in avocados. Looking at products already registered

on another subtropical crop in the state would significantly reduce the timeline and hurdles to registration.

Alion (Indaziflam) was a promising product that provides pre-emergence control of broadleaf and grass weed, including many glyphosate-resistant species. However, Bayer would not support registration of the product due to concerns with the shallow rooting of avocado and the potential for root up-take. Similarly, Treevix (Saflufenacil), which provides good control of broadleaf weeds including those resistant to glyphosate, was not supported by BASF due to issues they have observed on avocados in Chile.

Matrix (Rimsulfuron) — which provides contact and extended residual control of grasses and broadleaf weeds, including glyphosate resistant weeds such as fleabane — was supported by Corteva for registration on avocados. This product will be entering IR-4 trials in 2023 to complete residue studies. If everything goes smoothly, Matrix may be available for California avocado growers by late 2024.

Shadow (Clethodim) is used for postemergence control of grasses and was also supported by its manufacturer, Arysta. Similar to Matrix, Shadow will be entering the IR-4 program in 2023 for residue trials.

What is the IR-4 Program?

The IR-4 Program is a federally funded program that is a partnership between the USDA National Institute of Food and Agriculture and the Agricultural Research Service, U.S. Environmental Protection Agency, the agrochemical industry and commodity groups. The project was formed in 1963 to address the “minor use problem.”

In the U.S., fruits, vegetables, nuts, herbs, spices, and ornamental landscape plants are known as specialty crops. This is in contrast to corn, soybean, cotton, wheat, and other small grains that are known as major crops. The agrochemical industry lacks the financial incentive to conduct the efficacy trials and residue studies needed to register agrochemicals on specialty crops (minor crops) like they do on major crops where the chemicals can be sold for use on millions of acres. This became known as the “minor use problem.”

The mission of the IR-4 program is to: “Facilitate Regulatory Approval of Sustainable Pest Management Technology for Specialty Crops and Specialty Uses to Promote Public Wellbeing.”

Thus, when a specialty crop like avocados needs to have a new chemical registered it does not have to spend the hundreds of thousands to millions of dollars necessary to complete the registration process. We can, given sufficient efficacy data and the support of the chemical manufacturer, submit the product to the IR-4 Program to complete the registration process.

Chloride Mitigation Strategies for Avocado Irrigation Water

Chlorides in irrigation water are a major issue for almost all California avocado growers since avocados are generally considered the most chloride sensitive of all tree crops. However, the issue of managing chlorides has proven intractable. In 2021, the PRC was introduced to Dr. Haizhou Liu, an associate professor of chemical engineering at UC Riverside, who is an expert in chloride mitigation in wastewater treatment systems. CAC funded a one-year project with Dr. Liu to review what technologies exist that could potentially be used at the grove level to treat avocado irrigation water.

Dr. Liu and his team reviewed avocado irrigation water analyses provided by cooperating growers as well as the analyses from samples they collected. The purpose of this evaluation was to conduct a holistic review of the chloride chemistry in agricultural irrigation water. They input this data into chemical modeling software to understand how chloride molecules interact in saline irrigation water. This told them that chloride exists as negatively charged anions as well as in metal-chloride clusters, particularly with calcium, magnesium, manganese and iron. Thus, they could

look for technologies that would specifically handle these conditions.

Next, Dr. Liu and his team reviewed chloride removal technologies that could be a fit for avocado irrigation water. Their review found several candidate technologies, including nanofiltration, electrodialysis, and capacitive deionization with carbon electrodes.

Nanofiltration is a physical separation technology that uses low pressure and low energy input compared with traditional reverse osmosis systems. Furthermore, the membrane materials can be tailored to the specific irrigation water being treated.

Electrodialysis exposes water to low electric voltages using submerged electrodes. During this process, the chloride ions migrate toward an anode via ion exchange membranes, thus separating the chloride from the water.

Capacitive deionization is an example of newly emerging technologies that can be more energy saving and selective by choosing specific electrodes. In these systems, chlorides are removed as solid precipitates eliminating the difficulty of disposing brine solution from traditional reverse osmosis systems.

Dr. Liu and his team will be completing their evaluations and submitting a final report to CAC in February 2023. From this, CAC will be able to determine if there are technologies worth investing research dollars into for on-farm chloride mitigation.

Avocado Crop Coefficient for Optimized Irrigation

The final project currently being funded by CAC is a new project with Dr. Ali Montazar, an irrigation and water management farm advisor with UC Cooperative Extension. This project, like the seed weevil project, leverages CDFA funding. Dr. Montazar had received funding from CDFA to conduct research to re-evaluate the crop coefficient of avocados, but that funding

limited his work to a few sites in San Diego and Riverside counties. With CAC's additional funding, Dr. Montazar can expand his study to Ventura County to have data from a broader range of avocado groves.

The crop coefficient (K_c) explains the relationship of a specific crop's evapotranspiration (ET)—the amount of water used by a crop through both evaporation and transpiration—to that of a reference crop. In California, the reference crop is defined as a well-watered pasture grass field.

Systems such as the California Irrigation Management Information System (CIMIS) provide reference crop ET values. To use this information to calculate irrigation needs for avocados a crop coefficient is needed. For example, the irrigation calculator on avocadosource.com uses a crop coefficient of 0.86. This means if the CIMIS data shows a reference ET of 1 inch of water, avocados

would need 0.86 inches for the same period.

The current crop coefficient for avocados was cobbled together from several different studies, none of which were specifically designed to calculate the crop coefficient, and using some guestimates from citrus. The current value of 0.86 does not account for any seasonal variation nor does it account for variation in location (e.g., coastal vs. inland valley).

When completed, this new study will provide growers with a robust crop coefficient that accounts for seasonal and geographic variation as well as how irrigation water quality affects the crop coefficient value. This will help growers with their overall irrigation efficiency, which should directly benefit growers' bottom lines since we know irrigation is the single greatest cost in producing avocados. 🍫



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Avocado Groves in Matahui, New Zealand

New Zealand Avocado Industry to be Showcased at 2023 World Avocado Congress

By Tim Linden

New Zealand is excited to be hosting the 2023 World Avocado Congress in April and equally happy to be showcasing the various facets of their avocado industry from the grove through the supply chain.

The 10th World Avocado Congress (WAC) will be held in the Aotea Centre, in the heart of Auckland City, from Sunday, April 2 through Wednesday, April 5, 2023. In addition, there will be four field day options on Saturday, April 1, as well as two others on the opening day of the event. Jen Scoular, CEO of NZ Avocado and president of the World Avocado Congress

Committee, is encouraging attendees to arrive early and leave late to enjoy all New Zealand has to offer.

In late November, Scoular updated *From the Grove* on the planning process for the WAC and revealed that there were already more than 850 registrants, which was the committee's initial target. She expects many more registrations over the coming months, but not too many that it will be declared a sellout. She noted that the main auditorium in the modern Aotea Centre has seating for more than 2,000 people over three levels. However, Scoular said the closing gala does have limited room, so she urged current registrants and potential

registrants to sign up early to claim their seat at the always-enjoyable closing event.

The newly refurbished Aotea Centre boasts that it includes the latest cutting-edge technology throughout and impresses with fresh natural lighting, easy accessibility, and modern décor.

“The World Avocado Congress enables us to collectively view and critique our industry; learn about the opportunities and challenges and the current and future supply and demand of avocados,” Scoular said. “Those wanting to improve their avocado business need to be part of the global conversation taking place at the congress.”

She told *From the Grove* that the avocado industry is in a much different situation than it was when the last congress was held four years ago in Colombia. “We are very aware that the global environment and the avocado sector are in very different times than at the 2019 Congress, and what we are recognizing is the enormity of the opportunity to collectively step up together as a sector and find some answers to the challenges.”

She noted that environmental conditions absolutely require attention “but we also face increased global supply without the same increase in demand, except perhaps in the United States.”

Scoular opined that the ability of the U.S. market to keep

the demand curve ahead of or at par with supply is the result of a robust promotional scheme that just doesn’t exist in other consuming countries. “The U.S. has a fantastic structure for promotion,” she said, pointing to the federally-mandated Hass Avocado Board, which collects funds for its programs as well as promotional campaigns conducted in the U.S. market by organizations representing the various producing countries. The rest of the world does not have that structure in place but does need to step up and grow the market, using the U.S. experience as a blueprint, according to Scoular.

“We see huge increases in supply coming from Colombia and Peru,” she said, adding that more effort needs to be made to sharpen the demand side. Scoular noted that China is one country with very good potential that needs to be developed.

New Zealand exports 55-75% of its volume but also has seen its own per capita consumption of avocados increase significantly in recent years from 2.6 kg to 3.8 kg (about 8 pounds) per person. She said that was the result of a lot of market development, but more work needs to be done. Although she also noted that with a population of only 5 million people, the island country is not going to make a huge dent in the supply curve. New Zealand’s main export markets are Australia and several Asian countries.

Scoular added that there also are challenges concerning labor shortages, technology not quite keeping up, and glob-



Aerial photo by Cara Davis



Aerial view of Waiheke Island with sand, trees and houses on the shore and boats in the surrounding ocean

al freight disruptions. The WAC Committee president said planning is currently underway for the educational sessions and those topics will certainly be brought to the forefront, along with a host of others. She also revealed that the period in which to submit extracts has passed with 150 papers submitted and currently being reviewed for inclusion. She added that the full program for the World Avocado Congress should be published in late January. Topics will include the future of food, sustainability, climate change, food trends, food security, water and carbon lifecycles for avocado production, practical on-orchard application of research to achieve high yields, agritech innovation, global supply chains, grower returns and the ongoing challenges of food supply, to name a few.

Field days will include New Zealand's top growers - achieving yields of over 50 tons a hectare - new intensive plantings from greenfield dairy farms, and packhouse visits. Topics will include sustainable income through multiple crops, avocado propagation and diversity of horticulture, New Zealand agtech, supply chain issues and collaboration with scientific partners.

"Field days are always a highlight for congress attendees," Scoular said. "They are the perfect opportunity to

showcase New Zealand's leadership in avocado growing, sustainable environmental practice, ethical worker treatment and beautiful, lush orchards. We encourage our avocado visitors to book field day tickets on the World Avocado Congress website to select one of the fantastic trips we have on offer."

As part of the World Avocado Congress field days, NZ Avocado is partnering with social enterprise Eat My Lunch to supply lunches. "For every lunch eaten on the field days, a child is provided with a school lunch," she said. "Eat My Lunch cares for our future through supporting children in over 87 schools throughout New Zealand. Supporting Eat My Lunch aligns with the theme of the congress, Respectful: respect for people, respect for environment and respect for our future."

Scoular said with the global avocado market worth approximately \$8 billion (USD) in 2020 and expected to grow to \$17 billion (USD) by 2025, the World Avocado Congress has become the most prestigious global event to celebrate the avocado sector.

For more information and to register for the World Avocado Congress visit the website: wacnz2023.com 🥑

By Tim Linden

2023 Could Be Challenging

Though the 2023 California avocado crop is similar in size to 2022, the marketing situation appears to be much different. At least that is the view expressed by several fruit marketers.

“Last year we had an extreme market,” said Peter Shore, vice president of product management for Calavo Growers Inc., Santa Paula, CA. “We’re not expecting to see those high returns this year.”

In early 2022, it was evident that Mexico would fall short of its projected volume for its fiscal year, which runs from July 1 to June 30. As a result, there was a very strong market for avocados as California growers began picking their fruit in January. Many of the state’s growers altered their harvesting strategies and put much more fruit into the market during the first quarter of the year. That created a demand-exceeds-supply situation for California avocados through most of the season. In the grove, prices hit record highs and many growers had record returns.

One year later, Mexico has a robust crop, and the market price reflects a situation in which supply is greater than demand. The FOB price going into the new year is only half of what it was a year ago.

“We are expecting to see a normal harvesting schedule this season,”



Shore said. “There should be some fruit picked in March, but we expect the bulk of the crop to be picked from the end of April through June.”

Calavo is expecting the crop to fall somewhere above 250 million pounds but most likely less than last year’s crop of 270 million pounds. “It’s always difficult to guess what the market will be, but we are anticipating a steady market throughout most of the California season,” he said.

The 2022 market was quite volatile with record FOB prices throughout the first two-thirds of the calendar year. The Calavo executive said the market is expected to rise from its current state

once demand picks up in January as it typically does in the runup to the Big Game avocado promotions that proliferate. He expects the optimum time to move California fruit will be toward the end of Mexico’s season in May and June.

On the plus side, Shore said California’s volume level should create a fairly strong marketing situation for the state’s fruit as there are many Western retailers that will be clamoring for the fruit and ready to switch to it when it’s available. That should put the California avocado in a premium position with premium pricing, but that price is still a function of the overall market, which is expected to be much lower in 2023.

Another good sign for the 2023 California season is the expected size of the fruit. “We’ve had two good rain events so far this winter,” Shore said, hoping that the promising start to the rainy season continues. “That should help size the fruit. We are seeing good size on the trees right now (early December). It’s too early to tell for sure but we think the fruit might be one size larger.”

Gary Calaroso, regional business development director for the Giumarra Companies, said the Giumarra estimating team believes the California crop will be around the 250-million-pound range. “We think the volume will be very similar to last year with the size of the fruit being a little bigger,” he said.

Because of the heavy volume of Mexico fruit currently in the U.S. market and expected through the rest of the 2022-23 winter, Caloroso said, “we expect there will be better opportunities for California fruit in the spring and summer.”

He added that Giumarra does not expect to see much California fruit on the market until well into March. “We think the best opportunities are to market the fruit a little later than last year,” he said.

At the back end of the deal, the company will have California fruit in September and October. “We are typically in the California deal to the very, very end,” he said, noting that Giumarra has a number of growers producing in the most northern district, allowing for later marketing.

In characterizing the avocado market when he spoke in early December, Caloroso said “during the last couple months the market has been low. We believe that is a reflection of the economy. A lot of consumers are hurting and the demand is being impacted by folks watching their money very closely.”

Couple the impacts of inflation

and the volume of avocados expected to be sold in 2023 and Caloroso said it does point to a more challenging situation. “We believe that there will be more avocados in the U.S. market than we’ve ever seen before in 2023,” he said. “Mexico has a big crop, including Jalisco (granted access in mid-2022), and Peru has opportunities to ship a lot of fruit here. We think total volume (into the U.S. market) will top 3 billion pounds.”

He added that Colombia is also expected to send more fruit to the U.S. market but he predicted it would still be a relatively small amount as Colombian exporters and U.S. importers develop the market for that fruit. He added that it is very important that Colombia gets off to a good start with top quality fruit.

Because of that increased volume of fruit, Caloroso said California growers should moderate their expectations. “We’re not expecting to see record returns.”

He said the industry will have to closely watch what is the best price point to move avocados at retail in a down economy. He indicated that there could be a retail price point that can move the volume of fruit and also deliver relatively good returns all along the supply, including at the grower level.

Caloroso said another positive for the avocado industry is the return of the foodservice sector from its low points during the pandemic restaurant shutdowns. “The foodservice sector has come back,” he said. “It was the sector hit hardest during the pandemic and it is back, but we are concerned what will happen with consumers in this economy.”

Gary Clevenger, managing member for Freska Produce International, echoed the comments of the other two handlers in noting that every year is different and 2023 does not look like it will have the high prices for avocados that were prevalent during most of the 2022

California avocado season.

“Last year, growers were rushing to get fruit off the trees in January to take advantage of the high prices,” he said. “I don’t think that is going to happen this year.”

He said Mexico does have a large crop, but he expects the volume being imported into the U.S. to decline beginning in March/April. “This year, I think the sweet spot for the California fruit will be in the March/April/May time frame,” he said, adding that if the crop reaches the 250 million pound number, there will most likely be California fruit into September.

He added that several weather factors – including the typical wind in January – could impact the ultimate size of the crop. On a positive note, Clevenger said there have been several beneficial storms with more in the forecast. “Rain definitely helps size the crop and it also cuts a few dollars off the water bill, so it’s a welcome sight.”

Concerning the size of the crop, he has heard mixed reports from growers with some looking at a lot of fruit in their groves and others seeing a below average crop. Another unknown, according to the Freska executive, is that there are new plantings in Ventura County that will reach the harvest stage this year. He is reluctant to predict what kind of volume those trees might produce in 2022, but said over time, those young trees will give the Ventura County volume a boost.

Clevenger revealed in mid-December that the current market price for Mexico avocados was about \$30 per carton FOB at the border. While that is a price that will not entice California growers to pick early, he said it is an excellent promotional price and the industry should be able to move many avocados in January, helping to create a better marketing situation in the spring. 🍌



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