



# Annual Meetings

April 14-16, 2026



# Today's Program

1. **Welcome** – Rachael Laenen, Chair
2. **USMCA Joint Review – TRQ, USDA Mexico Inspections, Commission Redistricting, Industry Composition, Budget** – Ken Melban, President
3. **Retail 2025 and Looking Ahead** – Carolyn Becker and Dave Anderson, Retail Marketing Directors
4. **Advertising** – Zac Benedict, Marketing Director
5. **Public Relations** – Lori Small, Senior Marketing Manager
6. **Industry Affairs, Research** – April Aymami, Industry Affairs Director



**USMCA JOINT REVIEW – TRQ  
USDA MEXICO INSPECTIONS  
COMMISSION REDISTRICKING  
INDUSTRY COMPOSITION  
BUDGET**



# USMCA Joint Review – TRQ

- United States-Mexico-Canada Agreement “Joint Review” is underway to determine if improvements are needed and whether USMCA should be extended beyond its termination date in 2036.
- November 2025 Commission submitted written comments requesting a seasonal TRQ (tariff-rate-quota) on Mexican avocados for the months of March through September to help curb the surging low-priced avocado import volumes from Mexico.
- December 2025 I testified at the United States Trade Representative’s Joint Review hearing in Washington D.C. to reinforce the industry’s urgent need for the TRQ.
- December 2025 Congressional letter sent to USTR supporting our TRQ request.
- March 2026 Chair Laenen and I traveled to Washington D.C. and met with senior USTR officials and Congressional members.
- March 2026 Commission provided additional data to USTR on volumes and pricing.
- It is clear from our discussions the Joint Review negotiations are an extremely sensitive and complicated balance of interests.
- To best position the California avocado industry to receive the border relief it needs, it is critical the Commission be the one coordinated, unified voice for the industry and that we stay focused on achieving an effective seasonal TRQ.
- Joint Review is an untested process and is expected by the Administration to continue beyond July 1, 2026.



# USDA Mexico Inspections

- September 2025 USDA created an audit team to conduct field audits of certified groves.
- USDA agreed to provide quarterly reports on inspection activities and outcomes.
- 2026 first quarter report included:
  - APHIS working with State Department to hire additional audit team members (in progress).
  - Currently four experienced avocado program employees have been assigned.
  - USDA is working to increase orchard audits in the second quarter and beyond, but audits will continue to be limited until additional staff are hired and onboard.
  - When pests are detected, the originating orchard is suspended from the program pending recertification inspection and approval during the next certification cycle.
  - In the first quarter of FY2026, APHIS audited 18 orchards associated with packing house detections, of which 6 resulted in additional positive pest detections in the orchards.
  - During these audits APHIS reviewed an average of 54.77% of the trees in each orchard.
  - APHIS directly inspected 38,749 trees and found 202 to be infested with a total of 265 stem weevil specimens.
  - Additionally, the audit team performed paper audits of more than 5,800 harvest actions from over 2,000 orchards. Through data analysis, the team successfully identified and took action on at-risk orchards and shipments.
- November 2025 Commission submitted written comments under the USMCA Joint Review requesting the inspection program be made a permanent part of the USMCA.



# Commission Redistricting

- Required by Commission law every five years.
- Shall establish no fewer than three and no more than five Districts.
- Each District representing approximately the same percentage of avocado production.
- February 2026 Redistricting Committee unanimously recommended Four Districts.
- March 2026 Board approved by two-thirds majority (required).
- Effective November 1, 2026.
- September 2026 all member and alternate seats up for election.



# Industry Composition

2016 Lbs.	# of Growers	% of Growers	Total Lbs.	Avg. Lb. / Grower	% of Lbs.
>1,000,000	70	1.80%	158,439,983	2,263,428	39.19%
100,000-1,000,000	615	15.78%	183,991,160	299,173	45.51%
75,000-100,000	152	3.90%	13,120,669	86,320	3.25%
50,000-75,000	252	6.46%	15,510,541	61,550	3.84%
25,000-50,000	429	11.01%	15,294,785	35,652	3.78%
<25,000	2,380	61.06%	17,967,541	7,549	4.44%
<b>Total</b>	<b>3,898</b>	<b>100%</b>	<b>404,324,679</b>		<b>100.00%</b>

2025 Lbs.	# of Growers	% of Growers	Total Lbs.	Avg. Lb. / Grower	% of Lbs.
>1,000,000	68	2.31%	133,372,914	1,961,366	40.43%
100,000-1,000,000	490	16.62%	147,000,262	300,001	44.56%
75,000-100,000	119	4.04%	10,272,433	86,323	3.11%
50,000-75,000	197	6.68%	12,001,840	60,923	3.64%
25,000-50,000	379	12.85%	13,667,837	36,063	4.14%
<25,000	1,696	57.51%	13,592,536	8,014	4.12%
<b>Total</b>	<b>2,949</b>	<b>100%</b>	<b>329,907,822</b>		<b>100.00%</b>

2025 Lbs.	# of Growers	% of Growers	Total Lbs.	Avg. Lb. / Grower	% of Lbs.
>100,000	558	19%	280,373,176	502,461	85%
<100,000	2,391	81%	49,534,646	20,717	15%



**BUDGET**

# Revenues



	<u>BUDGET</u>	<u>%</u>
CAC Assessment Revenue (330MM Lbs. crop)	\$3,168,750	31.1%
HAB 85% Rebate Assessment Revenue	\$6,422,813	63.0%
<b>Subtotal Assessment Revenues</b>	<b>\$9,591,563</b>	<b>94.1%</b>
Administration & Accounting Fee Revenue (AIP)	\$72,000	0.7%
Grant Funding	\$210,000	2.0%
Interest Income	\$240,000	2.4%
From the Grove Income	\$60,000	0.6%
Other Income	\$31,250	0.3%
<b>Subtotal Other Revenues</b>	<b>\$613,250</b>	<b>5.9%</b>
<b>Total Revenues</b>	<b>\$10,204,813</b>	<b>100.0%</b>

# Expenditures



	<b>2025-26 BUDGET</b>	<b>%</b>	<b>2025-26 AMEND #1</b>	<b>%</b>
Consumer Marketing	\$4,597,600	33.9%	\$3,805,500	27.1%
Trade Marketing - Retail	\$2,817,400	20.8%	\$4,084,500	29.1%
Trade Marketing - Foodservice	\$650,000	4.8%	\$650,000	4.6%
Marketing Activities Support & Personnel	\$935,000	6.9%	\$905,000	6.4%
<b>Subtotal Marketing Programs</b>	<b>\$9,000,000</b>	<b>66.3%</b>	<b>\$9,445,000</b>	<b>67.2%</b>
Industry Affairs & Production Research	\$2,342,205	17.3%	\$2,368,238	16.9%
Grant Programs	\$200,000	1.5%	\$210,000	1.5%
Operations	\$2,027,829	14.9%	\$2,027,829	14.4%
<b>Subtotal Non-Marketing Programs</b>	<b>\$4,570,034</b>	<b>33.7%</b>	<b>\$4,606,067</b>	<b>32.8%</b>
<b>Total Expenditures</b>	<b>\$13,570,034</b>		<b>\$14,051,067</b>	
<b>Total Revenues</b>	<b>\$10,194,813</b>		<b>\$10,204,813</b>	
<b>Excess Of Revenues Over (Under) Expenditures</b>	<b>(\$3,375,221)</b>	<b>-33.1%</b>	<b>(\$3,846,254)</b>	<b>-37.7%</b>

# Budget



	<u>2025-26*</u>	<u>2024-25</u>
Beginning Reserves – November 1, 2025	\$10,847,600	\$16,089,300
Estimated Ending Reserves – October 31, 2026	\$7,001,346	\$11,003,755
<b><u>REVENUE</u></b>		
CAC Assessment Revenue (\$0.01/lb.)	\$3,168,750	\$1,950,000
HAB 85% Rebate Assessment (\$0.025/lb.)	\$6,422,813	\$7,905,000
Other	\$613,250	\$517,000
<b>Total Revenues</b>	<b><u>\$10,204,813</u></b>	<b><u>\$10,372,000</u></b>
<b><u>EXPENDITURES</u></b>		
Marketing Programs	\$9,445,000	\$11,085,000
Non-Marketing Programs	\$4,606,067	\$4,372,545
<b>Total Expenditures</b>	<b><u>\$14,051,067</u></b>	<b><u>\$15,457,545</u></b>
<b>Excess Of Revenues Over (Under) Expenditures</b>	<b>(\$3,846,254)</b>	<b>(\$5,085,545)</b>

\*Amendment #1

# Marketing Update

1. Program nuts and bolts
2. Retail prioritization
3. Advertising targeting
4. Brand evolution
5. Trade PR activity
6. Consumer PR activity



# Program Nuts & Bolts

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
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## KEY CHANNELS

Consumer	Retail
<ul style="list-style-type: none"> <li>• Targeted paid media/advertising</li> <li>• Paid content partnerships</li> <li>• Social media advertisements</li> <li>• Owned digital (website, blog, enewsletter)</li> <li>• Consumer media/public relations</li> <li>• Consumer influencers</li> </ul>	<ul style="list-style-type: none"> <li>• In-store promotions/demos</li> <li>• In-store influencer activations</li> <li>• Customized point-of-sale materials</li> <li>• Sales contests</li> <li>• Shopper marketing (retail operated)</li> <li>• Targeted paid media/advertising</li> <li>• Owned digital (website, enewsletter)</li> <li>• Retailer social media advertisements/placements</li> <li>• Industry trade media/public relations</li> </ul>



**RETAIL**



# Incremental Funding 2026

## What Do You Get With Additional Funding?

- With volume-moving retailers, you get a promotion activation every month of the California season – May through August. 4-5 activations versus only 1 or 2
- Goal: Large volume of fruit moving through the pipeline focused when less import competition in marketplace

<b>RETAIL PROMOTION CATEGORIES</b>	<b>AVERAGE VOLUME UNIT MOVEMENT PER MONTH (Circana Data)</b>
National Chains with Key Western Divisions	18,475,000
National Club Retailers (Western Divisions)	4,500,000
National Specialty Retailers	6,526,512
National Mass Retailers (Western Divisions)	2,900,000
Regional Retailers	1,900,000
Regional Specialty Retailers	290,000
Hispanic-Dominant Retailers	360,000
<b>TOTAL:</b>	<b>34,951,512</b>

# Retailer Shopper Marketing 2025



- 377,000 Impressions & 38,000 Units Sold - Raley's
- 2,744,362 Impressions & 861,545 Units Sold - Albertsons Media

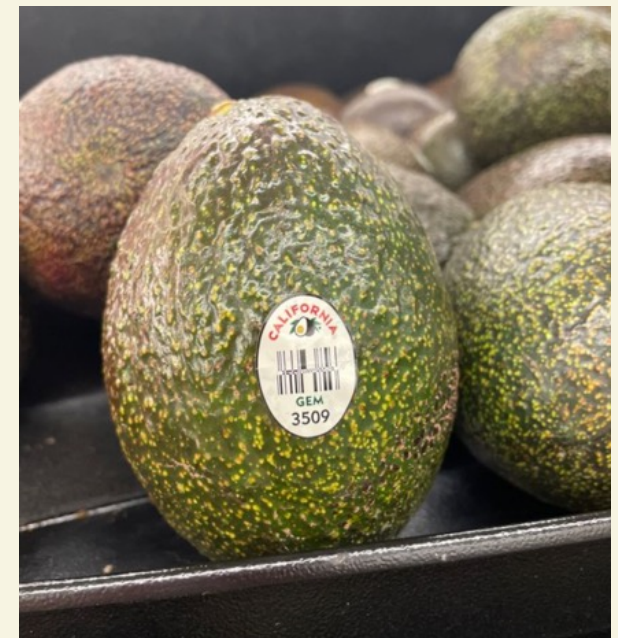
# SoCal Retailer 2025



## Store Audits:

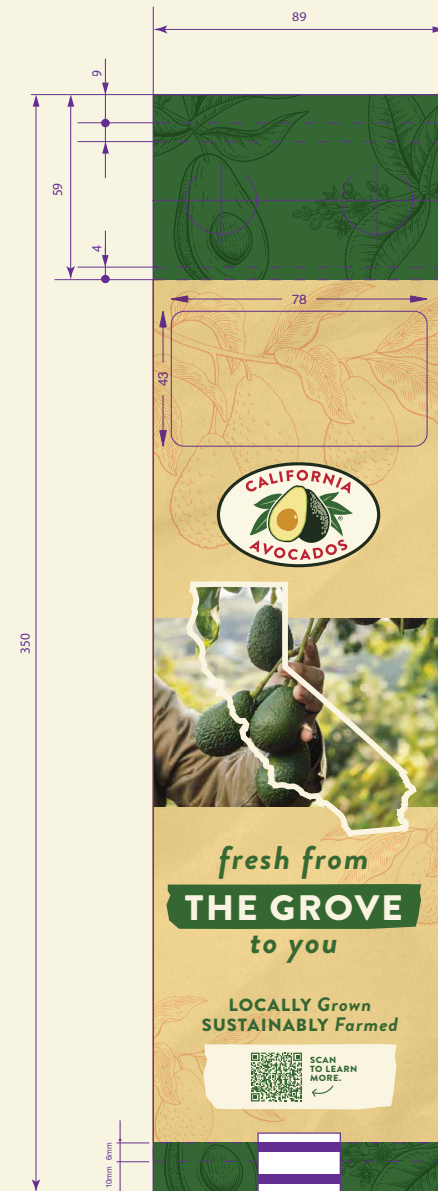
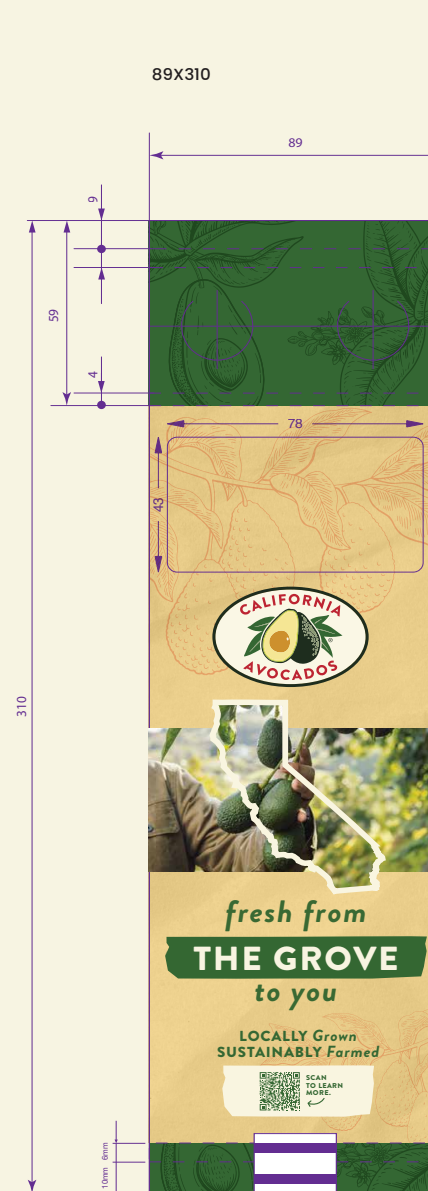
- June 1-July 6, 2025 Promotion: California as primary source
- Sales Contest using CAC Display Bins, GEM's and all sizes from California

*California Sales Contest June  
4U Digital Coupon Buy 3, get 1 Free*



# Walmart Bag 2025

- Customized Bag Straps for Approx 1,000 Walmart Stores With 10 Wk Ad Support



# Costco Late Season 2025



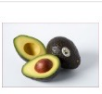
- Costco Late Season TPD Support 2025



# Ralphs-Food4Less-Frys-Smiths-Fred Meyer



- Over 1MM coupons via Targeted Digital Delivery

Approved Enabled YouTech General Pool One Off tracy Actions

**Save \$1 on 2 Large California Avocados** When you buy TWO (2) Large California Avocados. Excludes Organic Avocados.  
Clip ID: 4037793    Retailer Offer ID: 800000148830    Manufacturer Offer ID: 1142180    Source ID: 4230:Kroger    Offer Destination: 4230:Kroger White Label Site

POS Start	POS End	Display Start	Display End	Clip Limit	Clips (real time)	Clips (settled)	Redemptions	Brands	Categories	Targeting Rules
07/30/2025	08/19/2025	07/30/2025	08/12/2025	250000	0	N/A	N/A	California Avocados	Produce	Banner City Market, Banner Dillons, Banner Fred Meyer, Banner King Soopers, Banner QFC

*Created on: 07/17/2025 10:18 AM | Last edited on: 07/21/2025 12:31 PM*

# 2025



Target stores, 400 West Coast Locations





# 2026 Direction

- 2025 market conditions mandate new direction for 2026
- Commitment to volume – prioritization – extending season
- Multiple examples of retail merchandising demonstrated
- Enhancing scope and breadth of programming in 2026
- Laser focused on full seasonal support for priority retailers



**ADVERTISING**

# Consumer Target Audiences



Ultra and Mega buyers, who are responsible for 53%+ of avocado purchase dollars



PRIMARY

- Age range: 25-54 (primarily Millennials)
- \$89K+ average household income
- California, Oregon, Washington, Arizona, Utah, Colorado



SECONDARY

- Gen Z (18-24)
- Gen X (55-60)
- Spanish-language speakers
- Expanded geographical regions

# 2026 Brand Evolution

Continue to evolve the “What’s Inside a California Avocado” campaign by introducing **the authentic voices of California avocado growers.**



# :60 Advertisement

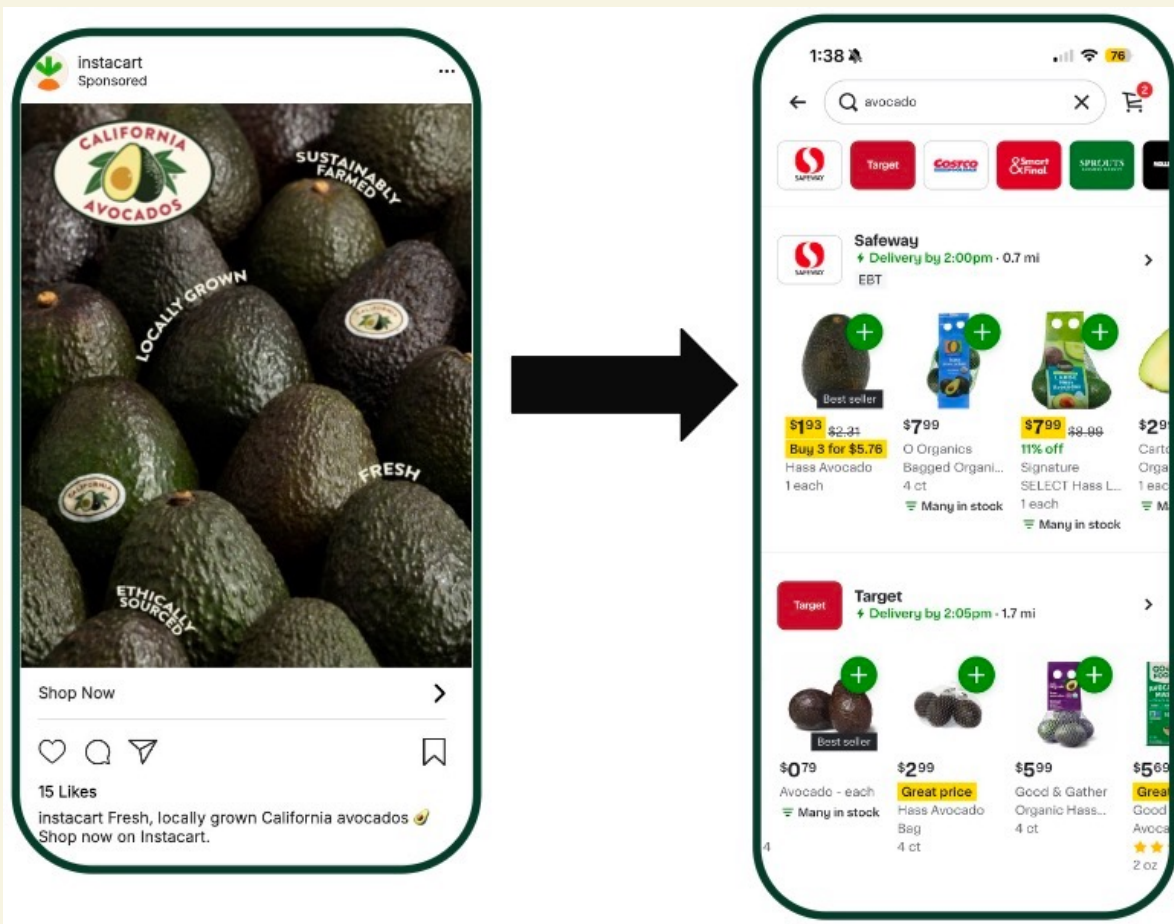


[View online: https://www.youtube.com/watch?v=IfoWY9FspgM](https://www.youtube.com/watch?v=IfoWY9FspgM)

# Video Advertising



# NEW! Instacart (California)





# Customized Retail Support

- In-store signage/bins
- Point-of-sale materials
- Digital banners
- Social media content



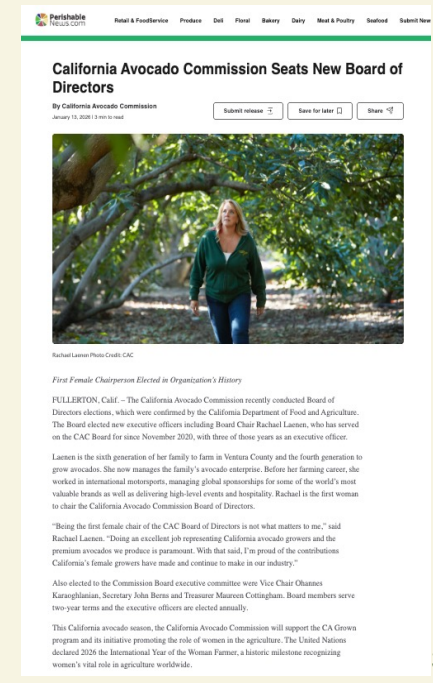
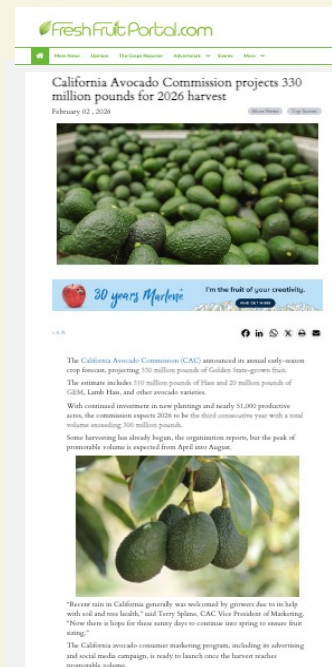


# PUBLIC RELATIONS



# Trade Media Activities

- Proactive efforts kicked off in January; more than 40 stories placed; releases have included:
  - Seating of new board members and executive committee
  - Early season crop forecast
  - Recognition of female growers in honor of International Women's Day
  - Launch of advertising efforts
  - Referendum results
- Reactive responses to media interview inquiries; nine feature stories secured to date



# Retail Influencer Activations



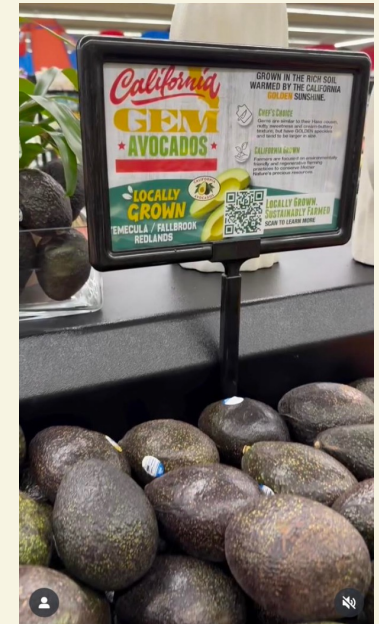
## Sprouts Farmers Market Activation

- Ventura County
- Integrated retail + grove tour experience



## Stater Bros. Markets Activation

- San Diego County
- In-store Come Shop With Me experience



# Hyper-Local PR Market Bursts



Late March — San Diego

Mid-April — Los Angeles

Mid-May — Santa Barbara/SLO

Mid-June — San Francisco Bay area

Mid-July — Sacramento

August — Ongoing support





# Market Burst Components

**Each market activation will be customized:**

- Sponsored TV segments
- Local media outreach
- Local California Avocado spokespeople
- Localized consumer influencers
- In-store retail activations with influencers

**Additionally, multi-market activities include:**

- Press releases
- MAT release



# California Avocado Voices



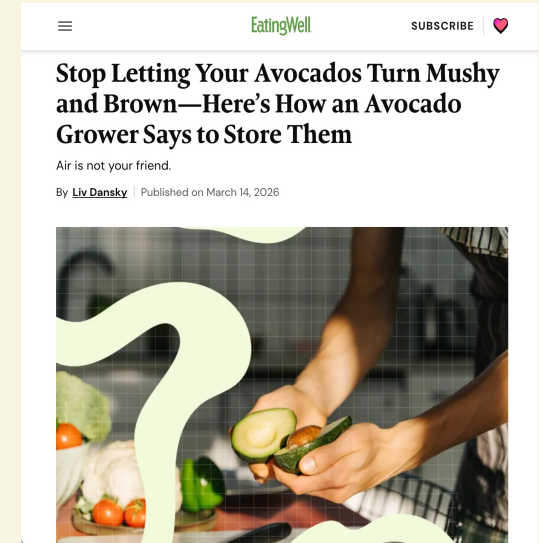
## Broadcast + Local Impact

- Robert Jackson interviewed by KOGO-AM radio



## National Consumer Media

- Daryn Miller quoted in Food & Wine
- Maureen Lamb Cottingham featured in EatingWell





# Sponsored TV Segments

## TV Segments:

- **San Diego | The Localist — Fox 5**
  - Broadcasted live March 26
- **LA | KTLA**
- **Santa Barbara/SLO | Morning News — KEYT**
- **San Francisco | Live in the Bay — KRON**
- **Sacramento | Your CA Life — ABC 10**





# INDUSTRY AFFAIRS

# Assistance for Specialty Crop Farmers (ASCF) Program

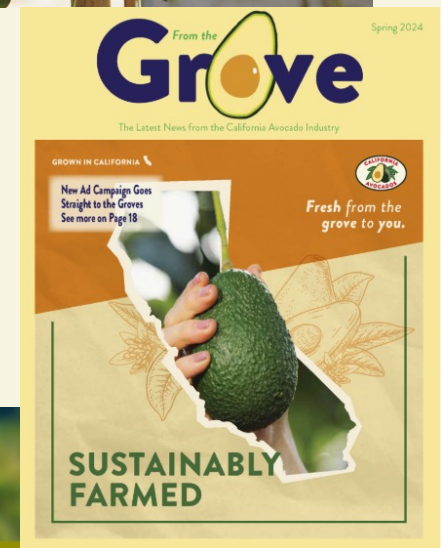
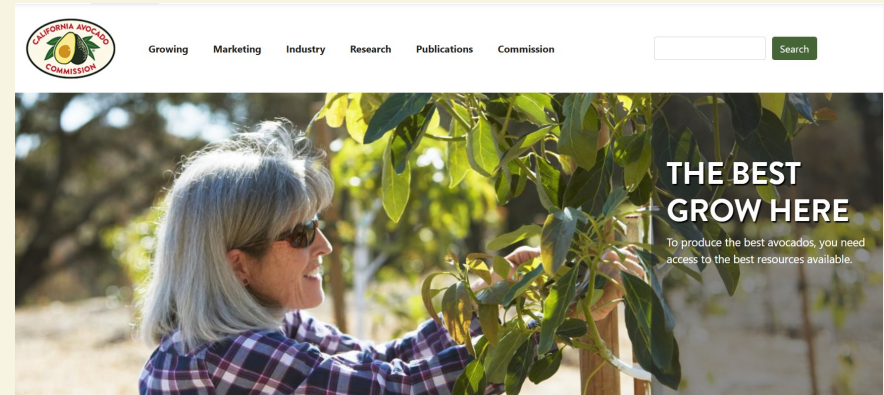


- \$1 billion through a one-time bridge payment for specialty crops to address market disruptions, elevated input costs, inflation and market losses due to unfair trade practices.
- ASCF payments are based on reported 2025 planted acres.
- **Acreage Reporting** Period Reopened: **DUE April 24, 2026**
  - FSA has reopened the acreage reporting period to give producers more time to complete 2025 crop acreage reports for eligible ASCF crops.
  - Growers who have never interacted with their FSA should connect with their local FSA office ASAP to ensure they are in the queue.
- Commodity-specific payment rates will be released soon after the acreage reporting deadline.

# Grower Outreach



- Grower website
  - CaliforniaAvocadoGrowers.com
- Magazine
  - *From the Grove*
- E-newsletter
  - GreenSheet
- Educational Videos
- Board/Grower/Field Meetings





# GreenSheet and SMS Sign-up!

- You **MUST** sign-up again to **REMAIN** on the **GREENSHEET** list!
- Semi-monthly e-newsletters
- Industry alert emails
- NEW – SMS text messaging capabilities!
- NEW – Region specific communications!





# Grower Crop Survey

- **ONLINE** only submissions!
- What you need
  - CAC ID
  - Grove Zip
  - # of Acres by Variety
  - Estimated LBs by Variety

## **URGENT**

REQUEST FOR GROWER  
PARTICIPATION IN THE CALIFORNIA  
AVOCADO INDUSTRY CROP  
ESTIMATE

**RETURN BY MAY 15, 2026**



**RESEARCH**



# CAC Funded Research

- **12 Current Projects - \$860,130**
  - Pest & Disease \$526,075
  - Breeding, Varieties & Genetics \$29,232
  - Cultural Management \$272,323
  - Industry Research Support \$32,500
- **Recently Completed**
  - Crop water use data and crop coefficients for avocados  
*Dr. Ali Montazar*
  - Avocado Irrigation Calculator (Ventura County only)  
*Andre Biscaro*
- **Industry Priorities and Future Projects**
  - Email Tim Spann at [tim@spannag.com](mailto:tim@spannag.com)





# ProGibb LV Plus SLN Renewed

- Renewed through July 31, 2029
- Use pattern remains the same as previous SLN
  - 1 application per year
- Minimal disruption to harvesting and other grove management activities
  - Restricted entry interval - 4 hours
  - Preharvest interval – 0 days
- Can be used under organic and conventional management
- Questions
  - Consult your local PCA
  - Tim Spann at [tim@spannag.com](mailto:tim@spannag.com)



**THANK YOU**