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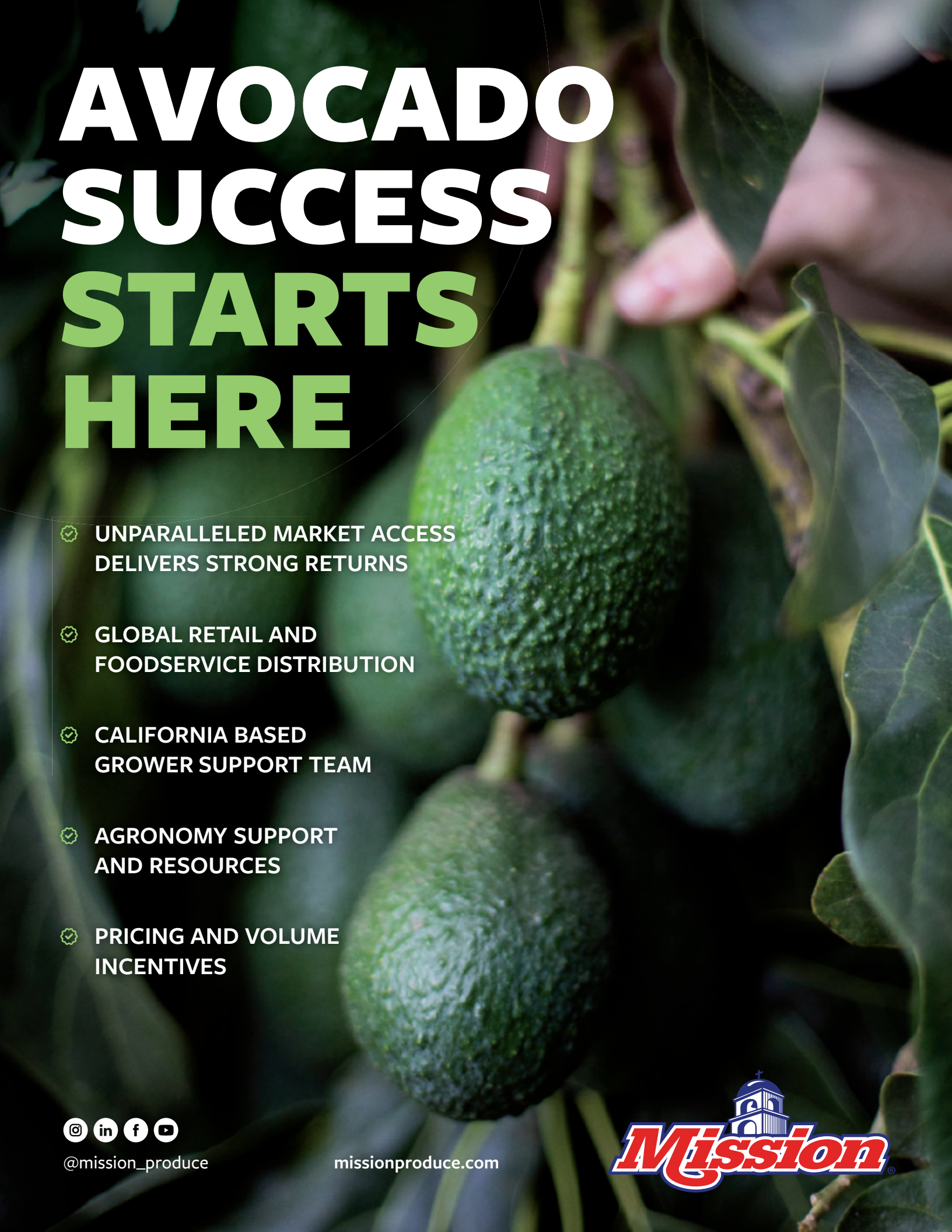
Fall 2026

The Latest News from the California Avocado Industry



CAC'S INFLUENCER PARTNERS CREATE RETAIL-FOCUSED CALIFORNIA AVOCADO STORIES FOR TARGETED AUDIENCES

See more on Page 8



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From the **Grove**

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President
Ken Melban
kmelban@avocado.org

Editor
Tim Linden
Champ Publishing
925.216.0973
tim.linden@ymail.com

Ad Sales
Tom Fielding
626.437.4619
tomfielding1@mac.com

Design/Layout
Heather Gray
User Friendly, Ink.
userfriendlyink@gmail.com

April Aymami
Director of Industry Affairs
and Operations
aaymami@avocado.org

www.californiaavocadogrowers.com

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Message from the President

By Ken Melban
President



Ken Melban

CAC Continues to Press for America First Trade Policy

The California Avocado Commission's pursuit of a tariff rate quota (TRQ) on Mexican avocado imports remains an uphill battle, but developments in early October show why we keep pressing.

On October 1, Mexican President Claudia Sheinbaum and Mexico avocado industry leaders announced certifications intended to improve labor compliance and environmental traceability. While these goals appear laudable, their legitimacy is suspect. In a country known for its lawlessness, these actions are more likely tantamount to putting lipstick on a pig regarding inspections, and they do nothing to address import surges and excessive volumes into the United States.



CAC President Ken Melban (right) meets with Ambassador Jamieson Greer, Mexico City, July 2026.

An October 2 Fresh Plaza article reported that Mexico is restricting exports from orchards established on deforested land. It also cited research by the Global Initiative against Transnational Organized Crime, which found that official sources estimate 80% of Michoacán's avocado orchards were established illegally.

The article describes how corruption helped countless groves gain legal status, which brings into serious question the validity of these new certifications. The concerns cited in the article go beyond environmental documentation and describe an industry deeply affected by organized crime, extortion and corruption, which demands scrutiny of the Mexican supply chain serving the U.S. market!

On October 5, seven California congressional Republicans urged U.S. Trade Representative Jamieson Greer to address surges in Mexican avocado imports. Their letter stated: "Preferential access to the American market should not allow Mexican cartels to use their influence over the supply chain to undercut lawful U.S. producers. Reasonable limits on surges would help USTR accomplish its USMCA (United States-Mexico-Canada Agreement) seasonal produce and trade-deficit reduction goals while preserving domestic production and preventing American growers from becoming the latest casualties of the Mexican cartels. For these reasons, we respectfully urge you to make reasonable and enforceable limits on avocado surges from Mexico a priority in the USMCA renegotiation."

The congressional request reflects the Commission's position: California growers need trade provisions that address import surges and afford them the opportunity to sell their fruit in their home market during their production season.

The next day — October 6 — the Commission issued a press release challenging Mexico's announcement. As I said in the release, "The administration should reject this charade and impose a seasonal tariff rate quota while California growers are in the market. Eighty percent of the orchards are already established illegally. Promises of future compliance do not remedy the harm California growers are enduring today. California growers can compete with farmers anywhere in the world, but they should not have to compete with drug cartels."

The Commission's message is clear: U.S. trade policy must give American growers a fair chance to compete. A TRQ would set an import volume eligible for preferential tariffs with imports above that level subject to a higher tariff. It must meaningfully address market surges and excess supply.

California avocado growers have invested too much in their groves, employees and communities to have their future put at risk, and the Commission remains relentless in its advocacy on your behalf.



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Chair's Report

By Rachael Laenen
Board of Directors Chair

Challenging and Productive Year



Rachael Laenen

As the 2025-26 crop year comes to a close, I'd like to take a little time to reflect on my first year as Chair of the Commission. It has been a challenging year to say the least, but I'm proud of what we have accomplished and excited about what is to come.

Early in the year, we made the decision to reallocate a significant part of the marketing budget towards retail programs and promotions. This allowed our Retail Marketing Directors to confidently approach the right retailers with valuable programs to promote California avocados. As a result, we were able to run more promotions with more retailers for longer periods of time. Our RMDs also established strong relationships with new customers in new geographies. The initial results of these programs look really positive, and the retailers are already excited about next year. With an anticipated 2026-27 crop of 400 million pounds, the groundwork we established this year will be invaluable as we seek to move 20% more California fruit. This strategy appears to have delivered tangible results this year, and we will continue with the same approach into 2027.

We also took an aggressive approach with trade advocacy in Washington, D.C. With the United States-Mexico-Canada Agreement under review, we seized the opportunity to request a seasonal tariff rate quota during California avocado season to help with excessive import volumes from Mexico. Ken Melban has assembled an experienced and well-connected team who are guiding our efforts for maximum impact. I have been approached by industry leaders in other commodities who have seen our advocacy efforts, and they have been highly complimentary, if not a little chagrined they weren't being as proactive! We have gained the attention of the decision makers at the Office of the U.S. Trade Representative and continue to strengthen our relationships with elected officials who are advocating on our behalf. While it remains an uphill battle, people *are* paying attention. The issues we are raising are serious and have widespread implications, and we will continue this advocacy work on behalf of growers.

I'm grateful for the support of my fellow board members and for choosing me to guide our discussions during this tumultuous year. I am pleased with the robust debates we have had, the breadth of topics we have tackled and the decorum we have maintained. While our decisions have not always been unanimous, I'm grateful we have all proceeded in a supportive way, knowing our actions are always guided by doing what is in the best interest of California avocado growers. In November, the new board will have a different composition based on our redistricting decision. We will have eight growers, representing four districts, two handler representatives and one public member. While there may be fewer of us at the table, the work we do will be no less important and the voices of growers will be no less heard. I'm confident our board can continue to work in a unified direction — where we go, we go together.

And yes, returns this year have been rough. At an average of 95 cents per pound, it is difficult for many growers to stay in business, let alone turn a profit. While the Commission is working hard on our behalf, there will never be a silver bullet to guarantee profitability. The responsibility falls on each of us to strive for improvement and efficiency every day. To leverage opportunities available through the U.S. Department of Agriculture, Natural Resources Conservation Service and Resource Conservation District that will help fund irrigation efficiency projects and other tools to enhance productivity. To attend as many meetings and seminars as possible to continue gaining knowledge. To talk to your fellow growers and find out what new things they're trying.

There is no guarantee next year will be better. But it isn't certain it will be worse either. As a farmer, I'm an eternal optimist and always hoping next year will be better. In the meantime, I'll be out cleaning ditches and drains to prepare for El Niño!

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Influencers experienced first-hand the unique grove-to-retail-to-table California avocado story with an immersive grove tour experience.

CAC's Influencer Partners Create Retail-Focused California Avocado Stories for Targeted Audiences

This season, the California Avocado Commission hosted high-impact retail activations with three Southern California retailers that generated authentic influencer content designed to bring the California avocado story to life and drive demand for the peak season fruit where and when it was available.

The influencer program shares the California avocado story — the fruit's unique seasonality, the people and practices behind the fruit and the versatility of avocados in recipes that suit any lifestyle — through social media channels that extend the reach of retail promotions. These partnerships help the Commission connect with targeted consumers, especially younger shoppers and digitally engaged consumers who increasingly discover recipes, food brands and grocery inspiration through retail-tagged social media content.

For the activations, the Commission partnered with 10 influencers who focus on developing content centered on living a healthy lifestyle, including a love for seasonal local produce, with an especially strong affinity for California avocados. Those selected for each activation were based within the selected retailer's region, had a high number of local followers who could visit local stores to purchase the fruit and excelled


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Influencers expand the reach of retail activations by capturing in-store content that brings to life the unique value of California avocados and builds awareness of their availability at nearby retailer locations.

at their ability to engage with CAC's target audience.

The first retail activation of the season featured an immersive grove tour experience led by California avocado grower David Jefferson at his Ventura County farm. Attendees gained a deeper understanding of the care, expertise and responsible farming practices of California avocado growers via a guided grove tour, harvesting demonstration and a recounting of the family's personal farming history. They also had an opportunity to harvest the fruit themselves and then settled in for a California avocado-centric lunch sourced from the retail partner. The day concluded with the influencers conducting an in-store visit to a local location of the retail partner to capture content that shared the grove-to-retail shelf connection that locally and responsibly grown avocados experience.

For another retail partner activation CAC developed this season, CAC leaned into messaging and branded materials to incorporate the retailer in a turnkey way, streamlining the process for simpler retailer inclusion. Here, influencers received a shipment of fresh California avocados and branded reusable shopping bags from the retail partner for a virtual "Come Shop with Me" experience. With fresh produce and branded assets in hand, the influencers crafted fresh, summer-focused recipe content that highlighted the fruit's availability at the retailer and demonstrated how easily California avocados can be incorporated into everyday meals and occasions. By sharing this content with their audiences, the influencers showcased the availability of the fruit at the retailer's nearby locations and encouraged their followers to enjoy California avocados

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CAC's influencer partners create immersive experiences for their followers that blend together lifestyle and recipe content — such as the pleasure of an in-store organic California avocado smoothie.

throughout the summer.

The final retail activation took place at multiple locations of a premium grocery chain where organic California avocados were featured in a popular smoothie at the retail beverage counter and within the store's produce department. Influencers captured videos and images of the trendy drink and eye-catching California avocado in-store displays. The influencers then shared aspirational lifestyle content — showcasing aesthetic, enviable visuals — from their in-store experience, helping reinforce the appeal of fresh, locally grown California avocados and the retailer's in-store availability of the fruit with their followers.

All activations took place in June and July, with influencer content going live during peak season and throughout each retailer-specific promotion. The program helped strengthen CAC's partnerships with key retailers by delivering a steady stream of authentic, retail-focused content that piqued consumer interest, spurred social media conversations and drove demand for the peak season fruit at their stores.

The program produced strong results, with influencer content generating 844,000 total impressions to date and an average 3.98% engagement rate across three retail activations — outperforming the 3.49% benchmark.

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

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Custom POS Materials Drive Loyalty with Retailers and Consumers

The California Avocado Commission's point-of-sale materials pique the interest of shoppers with eye-catching photography, mouth-watering recipe imagery, relevant purchasing information (such as ripening tips) and themed art that ties into cultural moments. These POS materials, such as signage, display bins and custom bag straps developed specific to retailers' requests and preferences, are key to driving sales and building loyalty with retailers to ensure California avocados stay on store shelves for longer periods of time during the season. Combined, these POS materials resulted in significant in-store placement of California Avocados brand signage throughout the peak season in retail units located both in-state and beyond. Thus far, CAC has provided customers with more than 5,250 display bins this season and developed more than 20 creative assets for in-store and digital usage.

When retailers request custom signage, it signifies a commitment by them to use California avocado-branded POS in their stores and share CAC's key marketing messages with their shoppers. "Since many retailers like their departments



Green Star Food Co-op in Ithaca, NY, serviced by wholesale distributor Four Seasons Ephrata, championed California avocados — GEM included — throughout the season.



Providing helpful ripening information on POS materials helps shoppers make informed purchase decisions.





This chalk art sign at Bristol Farms showcases organic GEM avocados and the unique attributes of the fruit.





California avocado-branded signage also immersed the fruit in cultural moments — like Memorial Day celebrations.

to look more consistent these days, or always have a purpose for the signs, the Commission has responded by offering custom designs that meet the retailers' needs — building more loyalty with those customers," said CAC Retail Marketing Director Carolyn Becker. "Check out the sampling of signs so far this season!"

Some retailers produce their own signs using CAC imagery and information provided by the Commission's marketing team. In addition, the Commission partnered with Walmart to produce custom straps for bagged avocados that served as on-shelf signage, calling attention to the origin of the Golden State fruit.



Don Don Donki, a discount retail chain in California and Hawaii, ran activations around Memorial Day.



Fresh Market signs not only featured the rich, nutty, buttery flavor of California avocados —they provided recipe suggestions demonstrating the versatility of the fruit.

The Commission also contracts with auditors who visit retailer partners and conduct in-store audits. These visits are used to provide CAC with reports on the various avocado displays created by their retailer partners and to ensure that fruit in California avocado-branded bins is filled solely with California fruit. The diverse displays, some of which are showcased in this article, help build awareness of the availability of California avocados, encourage demand and brand loyalty, and provide helpful information at the point of purchase for busy shoppers.



Heatwaves and Avocados

By Tim Spann, PhD
Spann Ag Research & Consulting

It is undeniable that our climate is changing and as a result our weather is becoming more erratic. For California avocado growers this is resulting in more frequent, hotter and longer duration heat waves. It is true that heat waves are nothing new to California avocado groves, but these events used to occur a few times per season with temperatures peaking over 100°F for a few hours in the afternoon. In recent years, heat events have become more common, often lasting for several days in a row, and temperatures have been documented to reach 100°F and stay above that temperature for 8 hours or more in numerous groves.

What Happens to an Avocado Tree During a Heatwave?

Under normal conditions, an avocado tree is extracting water from the soil through its roots, which moves through the tree and exits through leaf pores known as stomates. Stomates can open and close to regulate the flow of water vapor out of a plant and the entry of carbon dioxide for photosynthesis. The opening and closing of stomates is driven by plant hydration, temperature, relative humidity and wind. The loss of water from a plant's leaves through the stomates acts as an evaporative cooler, maintaining leaf temperature close to that of air temperature.

The purpose of closing leaf stomates under high temperature and/or low humidity is to slow the movement of water from the soil, through the plant, to the atmosphere. If this "flow" is too rapid, the water column — which is under very high tension — can snap, resulting in the formation of an air bubble (embolism) in the water conducting tissue (xylem) of the plant. These air bubbles are nearly irreversible and can lead to permanent damage to the plant.

Avocados evolved in a very moderate subtropical climate where temperatures rarely exceed 85°F and rainfall is abundant. As a result, they are poorly adapted to the high temperatures and low humidity that is common in California. Research conducted in California and Australia looked at the leaf function of avocados in Irvine, Riverside (Hass) and in the Murray Valley, Victoria (Fuerte). What they found is that avocado photosynthesis dropped off and stomates closed during the afternoon when air temperatures rose above about 85°F (Figure 1).

During a heatwave, the avocado tree's response is to close its stomates to prevent excess water loss and the development of embolisms. This results in leaf temperature increasing because the evaporative cooling has been reduced. Under

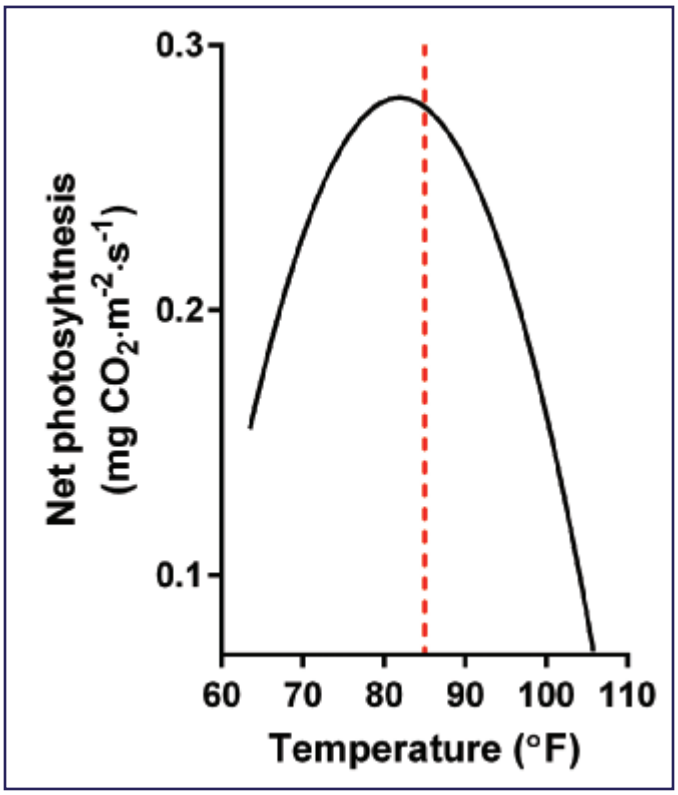


Figure 1. The relationship between air temperature and net photosynthesis of Fuerte avocado in the Murray Valley, Victoria, Australia. The vertical red line is at 85°F. Redrawn from: Scholefield et al. 1980 California Avocado Society Yearbook 64:93-106.



Figure 2. A 4-year-old tree showing heat damage primarily on the top and west sides of the tree.

extreme conditions, the leaves and small stems of the tree will overheat and literally cook. When trees are gradually and routinely exposed to high temperatures they can acclimate to a certain level, but when heat events occur in the early or late season, when the trees are acclimated to "normal" temperatures, they suffer more severe damage.

Heat Damage

Young trees are often more severely damaged during heatwaves than mature trees. The greater space between young trees, compared with mature trees, allows the heat to fully surround the trees, exposing them to high temperatures from all sides. Young trees also have less mass and smaller diameter branches. As a result, they have less water content relative to surface area and heat up much more quickly than large trees. Lastly, young trees simply don't have the extensive root system and reserves to tolerate extreme weather events and likely close their stomates sooner than mature trees. Damage to mature trees is usually primarily across the top of the canopy and on exposed sides of the trees.

As leaf temperature rises after the stomates close, wilting will occur. Once leaves wilt, they expose fruit and branches that were previously shaded. This results in sunburn damage to small and, in some cases, large branches. These damaged branches may sprout in time, but without some intervention they will never be healthy, fully functional branches in the tree canopy.

Fruit can suffer both direct and indirect damage from heat. Mature fruit exposed to heat can become very hot. Under normal conditions, thermal imaging cameras have been used to document fruit surface temperatures in bins of harvested fruit. Bins placed in the shade have fruit surface temperatures of about 75°F, whereas unshaded bins have fruit surface temperatures approaching 110°F. This demonstrates how quickly fruit can heat up when exposed to direct sunlight. There also is some evidence that severe heat can cause changes in the composition of the various oils in the avocado, resulting in decreased fruit quality.

Young developing fruit for next season, like young trees, have very little mass and heat up very quickly. This fruit can quickly reach at least ambient temperature all the way to the center of their developing seed and may even exceed ambient temperatures. As a result, the fruit become soft, their developing seeds die, and they are no longer viable. In addition, many of these young fruit can be severely sunburned as the surrounding leaves wilt and expose them to direct sunlight.



Figure 3. Young avocado fruit damaged during a heat event showing a dead seed.

Recovery

Many growers have probably heard the analogy: treat it like a freeze, wait and see. While this is true, there are some nuances missing in this analogy. Following a freeze, it is difficult to know the full extent of the damage and where the dead tissue ends and live tissue starts. Thus, the common advice is to wait until the tree begins to regrow, indicating where the living tissue is, and then prune back to this new growth. In the case of a freeze, this usually takes several months since we're not in an active period of growth for the tree. And that is the big difference — trees are usually in an active state of growth when heat events occur.

In most cases, trees damaged by heat will sprout quickly and show you where the living tissue is. Once this new growth appears, it is safe to come in and prune the dead and damaged wood from the tree. However, sunburn protection is critical. It is very important to pay attention to the weather forecasts and use your best judgement before pruning. If another hot spell is coming, it would be best to wait until temperatures return to more normal levels.

Whitewash **must** be applied the day of pruning — it takes



Figure 4. A heat damaged limb on a tree with new growth emerging near the base (circle). This branch should be pruned back to this new growth.

only a very brief exposure to full, mid-day sun for previously shaded branches to burn. Some growers prefer to whitewash their trees prior to pruning. They do this to prevent the whitewash from coating the pruning wound and inhibiting the normal wound healing response of the tree. If using this approach, be sure that all exposed branches are protected after the pruning is complete and apply additional whitewash if needed. Typical whitewash is a diluted latex paint — use 1-part paint to 1- up to 3-parts water — but some growers, particularly those who are certified organic, prefer to use a natural kaolin clay product (e.g., Surround®).

For young trees, those less than about 3 years old where most of the canopy may be damaged, the goal should be to get leaves back on the trees before the end of the growing season. These trees are unlikely to bloom the following spring. Once these trees are growing, prune away the dead and damaged branches and whitewash the tree. Be judicious with your water and fertilizer application. Remember, the leaf area on these trees has been drastically reduced and thus, so has their water need. Hand fertilizing with a good quality water-soluble complete fertilizer, rather than fertigation, would be a good way to nurse trees through recovery. This will allow you to tailor the amount of fertilizer applied to each tree based on its level of damage and regrowth.

For larger trees (about 4 years old and older) and mature trees, where only a portion of the canopy is damaged, it's likely there will be some bloom next year. These trees also should be pruned once new growth starts and whitewashed as needed. However, unlike with young trees, the reserves of these larger trees will result in a more rapid regrowth. It will still be important to modify irrigation schedules to account for canopy loss to ensure these larger trees are not over-watered, but their greater size provides some buffering capacity and regular fertilization can resume once new growth starts.

The damaged tissue from heat is going to provide a massive opportunity for avocado branch canker (*Botryosphaeria* and *Colletotrichum* fungi) pathogens to enter the trees. It is critical that the damaged branches be removed from the trees before the possibility of winter rains arrive. The damaged tissues are essentially open wounds in the trees. When we get rain, or even high moisture from heavy fog, the avocado branch canker pathogens will release their spores into the air, which will land on the damaged leaves and branches, forming latent infections. When conditions are right, those spores will germinate, and we will see severe cases of avocado branch canker. Thus, it is critical to begin the cleanup process now to prevent more severe damage down the road.

Preventing Heat Damage

The only way to prevent heat damage from occurring during extreme heat events is to modify the microclimate of the grove. And the only somewhat viable means of doing this is with water. When water is applied to a grove, there are three ways that it can cool the environment:

- Convective cooling: when water evaporates in air (either under the tree or overhead) there is a temperature drop that results in air circulation (convection) within the grove.
- Hydro-cooling: water applied directly to the leaves and fruit absorbs the sensible heat from the plant tissues and carries it away in "runoff."
- Evaporative cooling: water applied directly to leaves and fruit removes sensible heat to latent heat transfer during evaporation (this is how water loss through stomates cools leaves).

All applications of water in the grove will cool trees in one or more of these ways. Factors such as climatic conditions, water application rates, application uniformity and system operation will dictate how much each mechanism contributes to cooling.

The evaporation of water requires large amounts of energy (910 BTU/lb water at 86°F). When cooling a grove using evaporative methods such as canopy irrigation, this energy (heat) comes either from solar radiation and/or from the surfaces (i.e., plant tissues) the water contacts. To prevent sunburn damage, it is best if this energy (heat) comes from the plant tissues of which one is trying to prevent sunburn.

In the Pacific Northwest where orchard cooling has been used in apple production, rates of overhead water application range from 8 gallons per minute per acre (gpm/ac) to over 80 gpm/ac. Typically the lower rates are used for continuous application and the higher rates are used in pulsing applications — 15 minutes on, 15 minutes off.

A complete discussion of orchard cooling can be found in the article "Potential for Heat Mitigation by Overhead Irrigation in Avocado Groves" in the Winter 2021 issue of *From the Grove.*

The unfortunate reality of the changing world we live in is that the weather is becoming more erratic with extreme temperature events becoming more common. There is little growers can do to adapt to these events. The best prevention is to maintain optimum tree health so the trees are as well prepared as can be for these extreme events.

OpenET for California Avocados:

What Growers Need to Know

By Ali Montazar, PhD
UCCE Irrigation and Water Management Advisor
in San Diego, Riverside, and Imperial Counties

Efficient irrigation is one of the most important management decisions in California avocado production. Applying too little water reduces tree growth, yield and fruit quality, whereas excessive irrigation wastes water, increases production costs and may increase the risk of root diseases and nutrient leaching. Because avocado trees are highly sensitive to both water deficit and over-irrigation, accurate irrigation scheduling is essential for maintaining healthy orchards, maximizing productivity and improving water use efficiency.

One of the most effective ways to estimate orchard water requirements is through crop evapotranspiration (ET), which represents the combined water lost through soil evaporation and plant transpiration. Replacing the water lost through ET helps growers better match irrigation with crop water demand while avoiding both under- and over-irrigation.

Traditionally, ET-based irrigation scheduling has relied on weather station data, crop coefficients and field observations. More recently, satellite technology has made it possible to estimate crop water use directly for individual orchards. One example is OpenET (https://openetdata.org), a free, publicly available platform that provides field-scale ET estimates using satellite imagery, weather data and multiple scientifically validated evapotranspiration models. OpenET allows growers to monitor orchard water use throughout the season without installing specialized field instrumentation.

Like any irrigation decision-support tool, OpenET should be understood before it is relied upon for irrigation scheduling. This article summarizes findings from a recently published, peer-reviewed study (Montazar et al., 2026) that evaluated OpenET performance in four mature California avocado orchards and explains what the results mean for irrigation management.

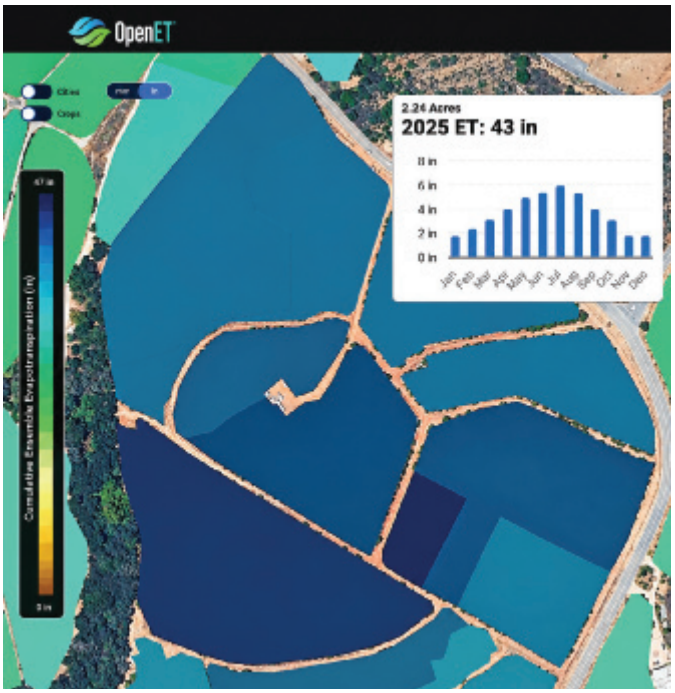


Figure 1. Example of the OpenET platform showing field-scale crop evapotranspiration (ET) estimates for commercial avocado orchards. The inset shows the annual ET total and monthly ET distribution for a selected orchard block.

How Does OpenET Estimate Orchard Water Use?

OpenET estimates crop evapotranspiration by combining satellite imagery with weather data and scientifically validated remote-sensing models. Satellite observations provide information about field and canopy conditions, while weather data describe the atmospheric conditions that drive water loss through soil evaporation and plant transpiration. OpenET combines estimates from multiple ET models to provide an integrated estimate of crop water use.

For growers, OpenET provides daily, monthly and annual ET estimates for individual orchard blocks without requiring specialized field instrumentation. These estimates can be useful for tracking changes in orchard water use throughout the season, comparing water use among orchard blocks or years, and supporting irrigation planning.

An important distinction, however, is that OpenET estimates rather than directly measures ET. Its accuracy depends on how well satellite observations, weather data and the underlying models represent conditions within a particular orchard. Therefore, evaluating OpenET against field-measured ET is important for understanding how its estimates can best be used for irrigation management in California avocado orchards.

How We Evaluated OpenET

OpenET was evaluated using field measurements collected from four mature commercial avocado orchards in Southern California between 2022 and 2025. The orchards, identified here as Sites A–D, represented different avocado-growing environments, including coastal, inland and transitional production regions.

Actual orchard evapotranspiration was measured using the eddy covariance (EC) method, a well-established technique for directly measuring field-scale ET (Figure 2). These measurements provided the field reference for evaluating OpenET estimates. Daily OpenET estimates were compared with corresponding field-measured ET to determine how closely OpenET tracked actual orchard water use. Daily differences also were examined over time to determine whether relatively small differences accumulated and resulted in meaningful differences in seasonal ET.

How Well Did OpenET Estimate Orchard Water Use?

Daily comparisons showed that OpenET generally tracked measured orchard ET well across all four avocado orchards. As shown in Figure 3, most daily differences between OpenET-estimated and field-measured ET were relatively small, with the majority of observations falling within approximately ±0.05 inch per day and centered near zero. OpenET generally estimated slightly higher ET than the field measurements, although day-to-day differences were modest.



Figure 2. Eddy covariance instrumentation installed above the avocado canopy in a commercial California avocado orchard. The system continuously measures actual orchard ET, providing the field reference for evaluating OpenET estimates.

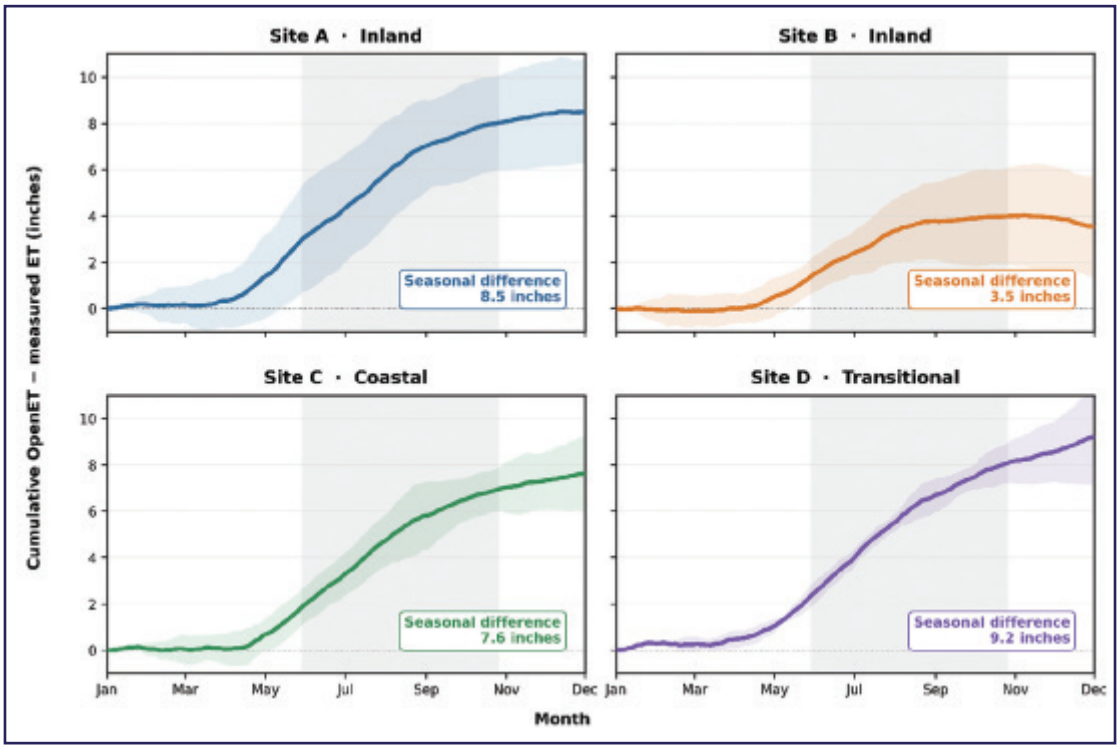


Figure 3. Distribution of daily differences between OpenET-estimated and field-measured ET across four commercial California avocado orchards. Each point represents one daily observation; boxes show the interquartile range (25th–75th percentiles), median and 10th–90th percentiles. Positive values indicate that OpenET estimated higher ET than measured ET.

Small daily differences can become important when they persist over an irrigation season. Irrigation decisions are typically based on water use accumulated over days, weeks and months rather than on a single day's ET. As a result, relatively small differences in daily ET can accumulate into much larger differences in estimated seasonal water use.

This pattern is clearly shown in Figure 4. Differences between cumulative OpenET and field-measured ET remained relatively small during winter and early spring, when orchard water use was low, but increased during late spring and summer as crop water use increased. By the end of the measurement period, cumulative ET overestimation averaged approximately 8.5 inches at Site A, 3.5 inches at Site B, 7.6 inches at Site C and 9.2 inches at Site D.

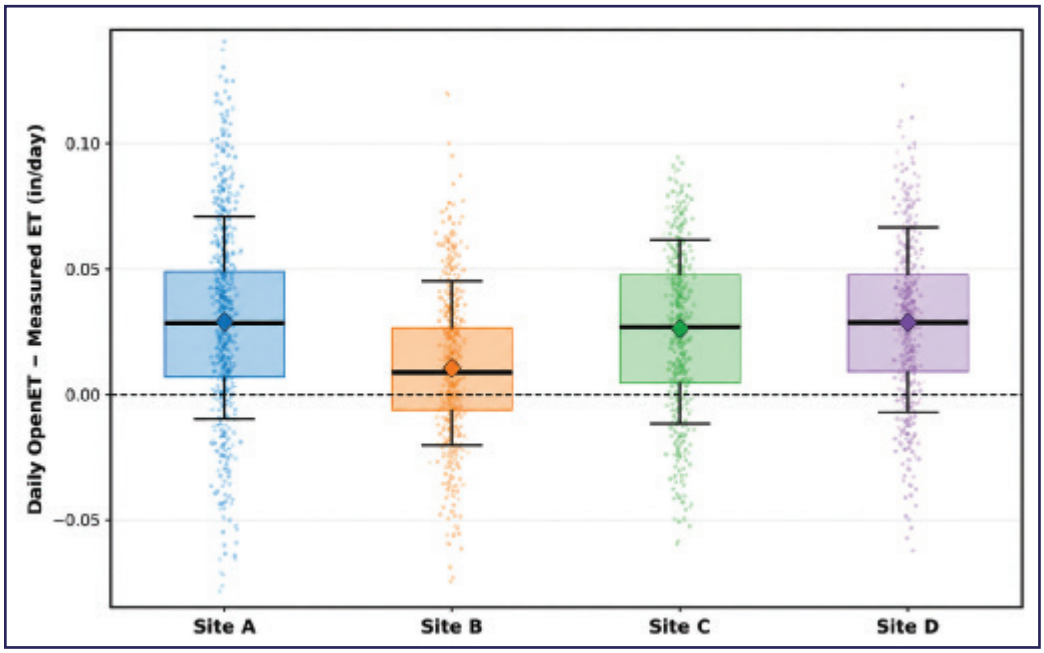


Figure 4. Seasonal accumulation of differences between OpenET-estimated and measured ET across four commercial California avocado orchards. Solid lines represent the multi-year average, and shaded areas indicate year-to-year variability. Although daily differences were generally small, they accumulated throughout the irrigation season.

These results show that OpenET successfully captured seasonal changes in orchard water use across the four orchards, but small daily differences accumulated over time and resulted in higher seasonal ET estimates than the field measurements. This distinction is important for irrigation management: OpenET can provide valuable information on seasonal water-use patterns, but its ET estimates should not automatically be treated as the exact amount of irrigation water that needs to be applied.

Differences between OpenET estimates and field measurements are expected because the two approaches represent ET differently. OpenET combines periodic Landsat satellite observations with weather data to estimate ET at a 30 × 30 m (approx. 100 x 100 ft.) spatial resolution, while the field reference was based on continuous eddy covariance measurements within each orchard. Orchard characteristics such as canopy cover, exposed soil, topography, irrigation practices and local microclimate also may contribute to differences between satellite-estimated and field-measured ET.

Using OpenET Effectively

The results of this study show that OpenET can be a practical tool for monitoring water use in California avocado orchards. It can help growers track seasonal changes in orchard water use, compare ET among orchard blocks or years, and support irrigation planning without requiring specialized field instrumentation.

OpenET is most useful when its estimates are interpreted as a guide rather than as an exact irrigation requirement. For example, an OpenET estimate of one inch of ET should not necessarily be interpreted to mean that exactly one inch of irrigation needs to be applied. The results from the four orchards evaluated in this study demonstrate that relatively small daily differences between OpenET-estimated and measured ET can accumulate into several inches during a season.

Irrigation decisions should therefore consider orchard-specific conditions in addition to OpenET estimates. Irrigation records, soil moisture information, weather conditions and observations of orchard conditions can provide important context for interpreting satellite-based ET estimates. When used together with this field information, OpenET can help growers better understand seasonal orchard water use and make more informed irrigation management decisions.

Key Take-Home Messages

- OpenET effectively tracked seasonal patterns of water use across the four California avocado orchards evaluated but generally estimated higher ET than field measurements.
- Small daily differences accumulated over time, resulting in seasonal ET overestimation ranging from approximately 3.5 to 9.2 inches among the four orchards.
- OpenET is most useful as a decision-support tool for tracking orchard water use and supporting irrigation planning rather than as an exact measure of irrigation requirement.
- OpenET estimates should be interpreted together with orchard-specific information, such as irrigation records, soil moisture, weather conditions and field observations, when making irrigation management decisions.

Learn More

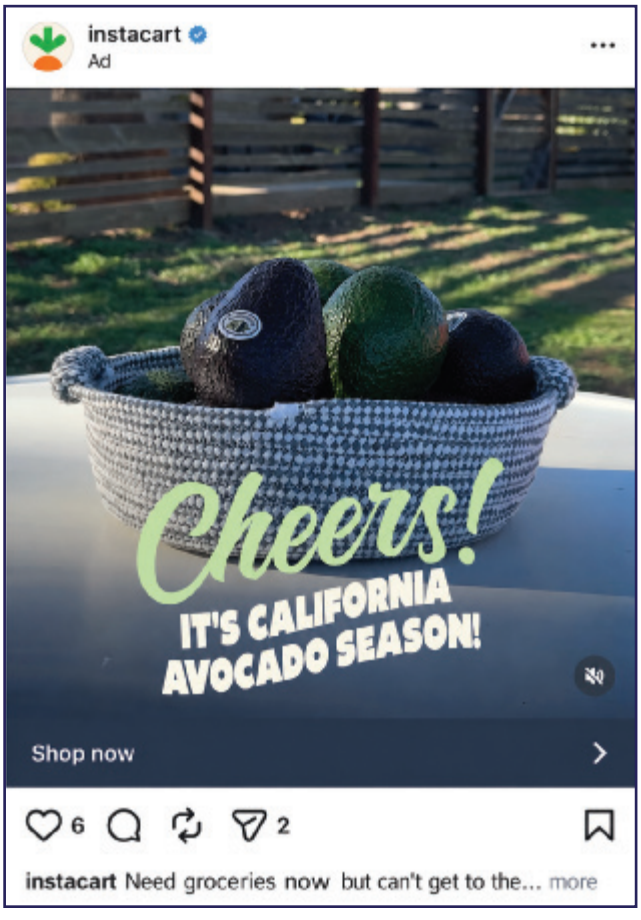
This article highlights the practical findings of our research for California avocado growers. For a detailed description of the field measurements, data analysis, and scientific interpretation, see:

Montazar, A., Faber, B., Daccache, A. (2026). Persistent daily OpenET bias drives seasonal water-use divergence in California avocado orchards. *Agricultural Water Management*, 333, 110651. https://doi.org/10.1016/j.agwat.2026.110651

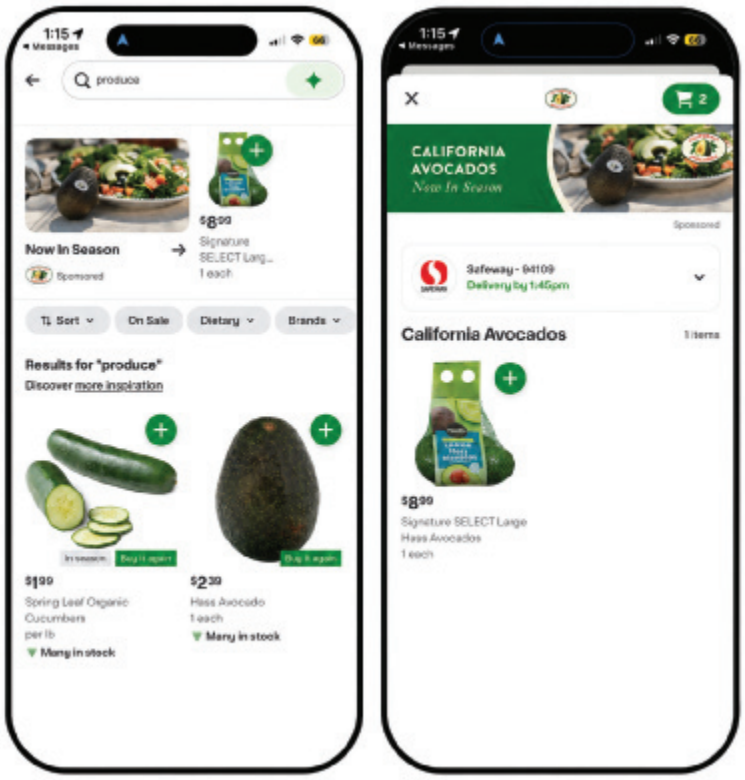
2026 Instacart Partnership Turns Digital Grocery Shopping into California Avocado Sales

This season, the California Avocado Commission tested a new way to connect consumers with California avocados, right when those shoppers are making grocery purchase decisions. Through a pilot partnership with Instacart — a popular online grocery shopping service — CAC targeted shoppers with California avocado advertisements "in app" based on region, along with the specific avocado products for which they were shopping, creating a direct connection between advertising and retail sales.

Traditionally, marketing via online shopping channels has been challenging because bulk avocados at retail are identified using Price Look-Up codes that do not always identify where an avocado is grown. Additionally, available programs could not be targeted regionally, meaning marketing California avocados via Instacart would not have been practical, nor an efficient marketing investment. That changed in 2026 when Instacart implemented a pilot program that allowed geo-targeting consumers by region.



California avocado social media ad featured on Facebook through Instacart.



Sponsored California avocado banner ad featured in the Instacart app.

From June 1 through July 31, 2026, CAC used sponsored display ads within Instacart, targeting shoppers in priority areas of California at select retailers carrying California avocados. The ads appeared as consumers browsed the platform and planned their grocery purchases, putting California avocados directly in front of shoppers at a critical point in the purchase journey.

The Commission also extended the campaign beyond Instacart by testing advertising on Meta platforms, including Facebook and Instagram. The social media activity helped keep California avocados top of mind among produce shoppers. Together, the two approaches reached consumers both while they were planning their purchases and when they arrived at the digital shelf.

The results were especially strong. The Instacart program generated a 6.63x Return on Ad Spend, meaning for every $1 CAC invested in Instacart advertising, the campaign generated $6.63 in California avocado sales. That exceeded Instacart's typical benchmark of 4x to 6x return. This display campaign generated $329,000 in sales directly attributable to the Instacart ads and 205,000 California avocado units sold.

Meta advertising also delivered strong results. The campaign reached consumers at a cost of approximately $3.42 to $3.45 for every 1,000 times an ad was shown, a measure known as Cost Per Impression. This was at the low end of Meta's typical $3 to $5 benchmark — which indicates high performance — helping the Commission reach a large number of produce shoppers.

Beyond the impressive numbers, the test demonstrated the potential of connecting advertising more directly to the point of purchase; rather than simply measuring whether consumers saw an ad, CAC connected ad exposure to actual purchases of California avocados. This provides a clearer picture of how digital advertising can help turn seasonal awareness into retail action, to demonstrate the demand that California avocados generate. These results also give CAC stronger performance data to share with retail partners, highlighting CAC's promotional value with digital support and future seasonal commitments.

For growers, that connection matters. California avocados have a limited, seasonal window to capture consumer attention and demand. By reaching shoppers when they are actively planning their grocery purchases, the program helped support demand and sales during the peak season. The sales connected to this advertising program demonstrate the opportunity to use increasingly precise digital tools to help drive purchases of California avocados at retail.

Influencer-Created Recipes Help Reach Younger Targeted Shoppers

California Avocado Matcha Smoothie and California Avocado Pancakes

The California Avocado Commission partners with key food and lifestyle influencers throughout the California avocado season to have them develop avocado-centric recipes that they share with their followers on social media and then for posting on CaliforniaAvocado.com. The consumer influencers this year have a combined following of more than 3.7 million across Instagram, YouTube and TikTok.

These unique, trend-inspired recipes are meant to keep California avocados top-of-mind among consumers and encourage them to look for California on the label when picking up their avocados to ensure they are selecting the locally grown fruit.

Below are two recipes created by Southern California-based influencer Erica Costello that use California avocados in unique ways and generated considerable buzz online. Give them a try!

California Avocado Matcha Smoothie

Serves: 4
Time: 10 minutes



Ingredients

- 2 cups milk of choice
- 1 ripe, Fresh California Avocado, seeded, peeled and quartered
- 1 1/2 Tbsp. drinking-grade matcha powder
- 4 Tbsp. honey or agave
- 1 tsp. vanilla extract
- 1 large frozen banana
- 1 1/2 cups ice

Instructions

1. Add milk, avocado, matcha powder, honey or agave, vanilla extract, frozen banana and ice to a high-speed blender.
2. Blend until creamy and smooth.
3. Taste and add more sweetener if desired.
4. Pour and enjoy.

California Avocado Pancakes

Serves: 2
Time: 20 minutes



Ingredients

- 1 cup all-purpose flour
- 1 1/2 Tbsp. brown sugar
- 1 tsp. baking powder
- 1/2 tsp. salt
- 1/4 tsp. cinnamon
- 1 ripe, Fresh California Avocado, seeded, peeled and quartered
- 3/4 cup milk of choice
- 1 large egg
- 1 Tbsp. vegetable oil
- 1 tsp. vanilla extract or vanilla bean paste
- Butter or avocado oil for pan

Instructions

1. In a medium bowl, whisk together flour, brown sugar, baking powder, salt and cinnamon.
2. Add California Avocado, milk, egg, vegetable oil and vanilla to a blender. Blend until smooth.
3. Pour wet ingredients into dry and stir until combined.
4. Heat butter or avocado oil in a pan over medium heat.
5. Scoop batter into pan and cook about 2 minutes per side, flipping once.
6. Plate and top with your favorite toppings.

Variation: Fold some chocolate chips or chopped banana into the batter before cooking, if desired.

Recipes created by Erica Costello for the California Avocado Commission.

**Large avocados are recommended for this recipe. A large avocado averages about 8 ounces. If using smaller or larger size avocados adjust the quantity accordingly.*

2026 Statewide Avocado Acreage & Condition Analysis*

Prepared by LAND IQ

EXECUTIVE SUMMARY

Spatial land use information is essential for the California Avocado Commission to make informed decisions for budgeting and marketing of crops. Accurate and timely land use information is the foundation of these analyses and is vital to the decision-making process. Increased availability of digital satellite imagery, aerial photography and new analytical tools make remote sensing land use surveys possible at the grove scale. These technologies allow accurate, large-scale crop and land use identification to be performed at time increments as desired and make highly accurate and comprehensive statewide avocado mapping possible.

Growers, industry, regulators, government agencies, and commodity groups also benefit from spatial data related to crop type, location, condition, and density. These data are key components for management of environmental resources and proximity to sensitive areas including water quality, air quality, and disease or pest vectors.

For 2026, the total planted avocado acreage in California was 55,522 acres.

INTRODUCTION

Accurate acreage information is critically important to the work of the Commission. Acreage drives a multitude of activities that range from yield forecasting to member data tracking and budgeting. In response to this need for information, Land IQ was contracted by CAC to develop a comprehensive and accurate statewide spatial land use database of avocado groves and condition on a grove scale using remote sensing, statistical, and temporal analysis methods.

FORECASTING METHODS

Land IQ integrated crop production knowledge with multiple satellite and aerial image resources to conduct remote sensing land use analysis at the grove scale. The mapping approach employs advanced spatial statistical analysis to determine prediction probabilities and inform Quality Assurance/Quality Control efforts. A rigorous QA/QC and photo interpretive analysis is employed to improve predictions on all lower confidence groves. In addition, these groves are also back-checked with the CAC industry representatives.

Individual avocado polygon boundaries (areas of homogeneous crop types representing true cropped area rather than legal parcel boundaries) are used so that each independent avocado polygon can be analyzed independently and assigned a condition class. The results represent the true cropped area and not legal or other less detailed boundaries that may be available elsewhere.

The condition legend was developed by CAC and is summarized in Table 1.

Table 1. Avocado Condition Description

Condition	Description
Producing	Groves that are greater than 4 years old.
Topped/Stumped	Groves that have been topped and/or stumped and not producing.
New/Young	Groves that are 4 years old or younger.
Abandoned	Groves previously identified as avocados that do not return to healthy growth statistics as represented by spectral data.

**This is an excerpt of the full report, which is available on CaliforniaAvocadoGrowers.com.*

Data Collection

Satellite data resources were used for the classification. Avocado boundaries from 2025 avocado mapping were used as a base layer for 2026. Multiple Landsat 8 images were used for the initial crop classification. Imagery from the Landsat 8 satellite is free of charge, available every 16 days, and used for temporal analysis throughout the growing season. Following analysis with Landsat 8 images, various sources of localized high resolution imagery were used to further evaluate groves for condition, age, and boundary updates. Data provided by Maxar is higher resolution but requires a paid subscription.

Analysis

The Land IQ avocado mapping unit is a grove-scale layer focused on avocado polygons equal to or greater than 0.5 acres across the state. 20,005 delineated polygons were classified using multiple image sources and dates. The images are used as the base layer data, in which classification algorithms are applied for crop identification.

Classified groves with a lower confidence level are carefully reviewed by assessing image resources using photo interpretation methods. Results are also cross-validated with ancillary data sources such as the coinciding USDA Crop Data Layer, county agricultural surveys and county crop reports to assess and evaluate significant differences.

The geospatial database is attributed with avocado polygon size in acres, relevant county, and the appropriate condition category per the CAC legend (Table 1). Table 2 summarizes the database attributes associated with the final mapping product and their definitions.

Table 2. Definition of Database Fields

Avocado Polygon Attribute	Description
Acres	Area of the avocado polygon
County	Indicates the county that the centroid of each avocado polygon resides in
Crop 2026	Crop classification type for the year 2026
Modified By	Name of person who last modified the record
Date Data Refers To	Date the data refers to
Last Modified Date	Date record was last modified
Condition	Describes condition of the avocado polygon
Year Planted	Year the grove was planted or stumped
Comments	Any user-provided comments
Source	Original source of the boundary and attribute information

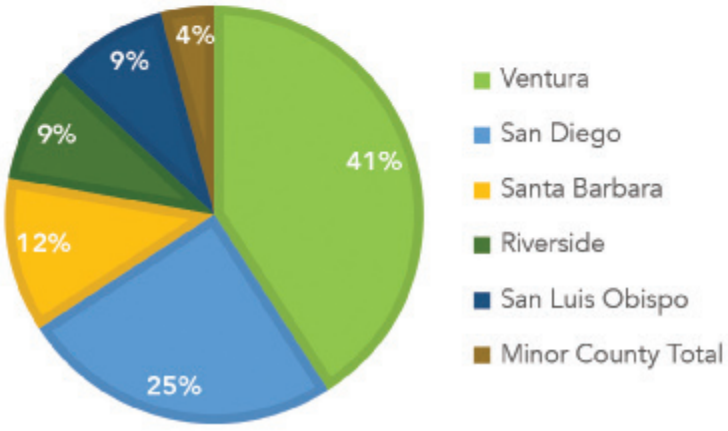
NUMERIC RESULTS

The avocado acreage classification for the 2026 year totaled 20,005 avocado fields and 55,522 planted acres. The five main avocado growing counties are Ventura, San Diego, Santa Barbara, Riverside, and San Luis Obispo. Small acreages were also present in Orange, San Bernardino, Monterey, Tulare, Los Angeles, Sacramento, Fresno, Kern, Santa Cruz, Sonoma and Stanislaus Counties. Statewide avocado acreages by county are summarized in Table 3 and Figure 1.

Table 3. Summary of 2026 Statewide Avocado Acreage by County

Five County	Acres	Number of Fields	Minor County	Acres	Number of Fields
Ventura	22,849	7,338	Orange	904	389
San Diego	13,810	6,139	San Bernardino	604	192
Santa Barbara	6,787	2,060	Monterey	355	76
Riverside	5,114	2,703	Tulare	79	32
San Luis Obispo	4,928	1,033	Sacramento	31	10
			Los Angeles	28	19
			Fresno	17	8
			Stanislaus	9	1
			Santa Cruz	3	3
			Kern	3	1
			Sonoma	1	1
Five County Total	**53,488**	**19,273**	**Minor County Total**	**2,034**	**732**
Overall Total: 55,522 Classified Acres / 20,005 Fields					

Figure 1. Summary of 2026 Statewide Avocado Acreage by County



Acreage by county and condition for the five main growing areas are summarized in Table 4 and Figures 2 and 3.

Table 4. Summary of 2026 Statewide Avocado Acreage by Condition

County	Producing Acres	Top/Stump Acres	New/Young Acres	Planted Acres
Ventura	19,416	449	2,983	22,849
San Diego	12,274	524	1,013	13,810
Santa Barbara	6,275	69	443	6,787
Riverside	4,324	126	664	5,114
San Luis Obispo	4,428	29	471	4,928
Five County Total	**46,718**	**1,197**	**5,573**	**53,488**
Minor Counties	1,800	20	213	2,034
Total	**48,518**	**1,218**	**5,787**	**55,522**

Figure 2. 2026 Avocado Acreage by Condition and County

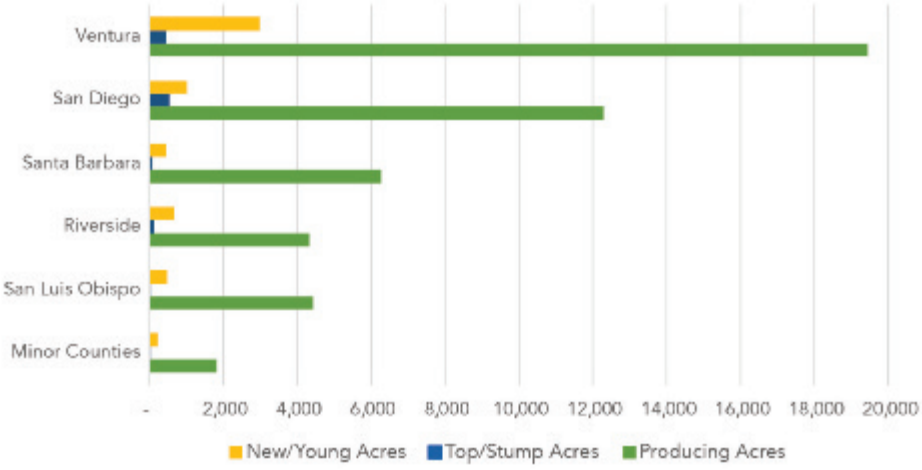
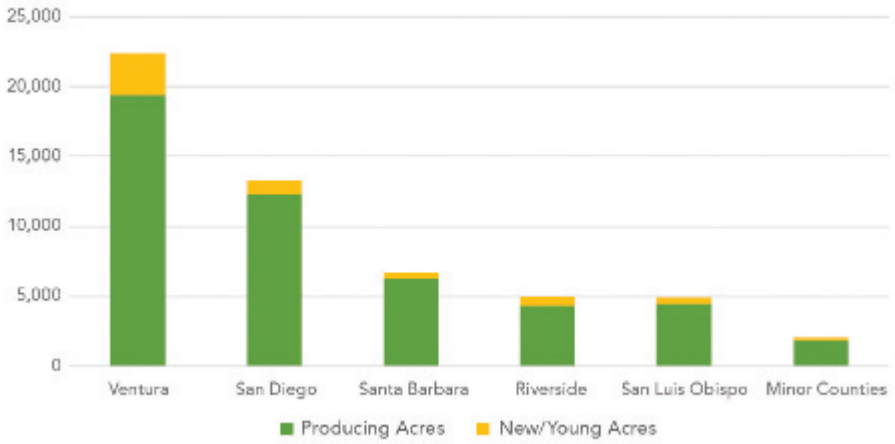


Figure 3. 2026 Avocado Acreage of Producing and New/Young Acreage by County



In addition to acreage and condition summaries, a spatial analysis was completed to determine acreage by other jurisdictional boundaries including zip code. Acreage by zip code is summarized in Table 5.

Table 5. Summary of 2026 Statewide Avocado Acreage by Zip Code

Ventura

Zip Code	Producing Acres
90265	4
91320	1
91360	35
91361	5
93001	1,495
93003	224
93004	145
93010	260
93012	1,248
93013	34
93015	3,116
93021	2,202
93022	2
93023	943
93030	37
93033	228
93036	103
93040	526
93060	4,892
93065	120
93066	3,797

San Diego

Zip Code	Producing Acres
91935	4
92003	580
92019	4
92021	272
92025	302
92026	807
92027	1,368
92028	3,240
92029	13
92040	5
92055	-
92057	257
92059	98
92061	1,291
92064	225
92065	164
92069	225
92078	45
92082	2,892
92084	483

Santa Barbara

Zip Code	Producing Acres
93013	2,040
93101	2
93103	40
93105	294
93108	134
93109	13
93110	25
93111	537
93117	2,957
93436	75
93454	49
93455	109

Riverside

Zip Code	Producing Acres
92028	25
92220	3
92503	94
92504	97
92506	3
92507	7
92508	19
92521	11
92530	4
92543	2
92544	13
92557	12
92562	144
92570	7
92583	9
92590	3,713
92592	86
92595	20
92881	17
92882	16
92883	21

San Luis Obispo

Zip Code	Producing Acres
93401	248
93402	15
93405	169
93420	589
93428	218
93430	362
93442	584
93444	600
93445	1
93452	18
93454	1,580
93465	44

Orange

Zip Code	Producing Acres
92602	592
92610	47
92618	63
92620	13
92624	0
92675	102
92694	0
92705	2
92782	7
92887	1

San Bernardino

Zip Code	Producing Acres
91709	17
91784	7
92313	13
92346	6
92359	127
92373	70
92374	336
92407	4

Monterey

Zip Code	Producing Acres
93907	3
93908	5
93960	266
95012	1
95076	7

Tulare

Zip Code	Producing Acres
93221	1
93235	1
93244	4
93247	3
93257	11
93286	17
93292	9
93631	4
93647	-

Sacramento

Zip Code	Producing Acres
95615	9
95690	8

Los Angeles

Zip Code	Producing Acres
90265	11
90274	4
90631	5
91301	0
91711	1
91768	4

Fresno

Zip Code	Producing Acres
93609	1
93648	2
93654	2
93662	1
93706	0
93725	7

Stanislaus

Zip Code	Producing Acres
95363	-

Santa Cruz

Zip Code	Producing Acres
95076	2

Kern

Zip Code	Producing Acres
93215	3
93308	-

Sonoma

Zip Code	Producing Acres
95476	1

In 2026, a separate analysis was performed to determine the year the grove was either planted or stumped. Table 6 shows the acreage that was either planted or stumped within that year (stumped acreage is included with planted acreage as stumped trees are treated as young/new trees for this planted classification).

Table 6. 2026 Planted Avocado Acreage by Year Planted or Stumped

Year Planted	Planted Acres	Year Planted	Planted Acres	Year Planted	Planted Acres	Year Planted	Planted Acres
1984	12,637	1995	107	2006	954	2017	1,178
1985	10	1996	155	2007	1,369	2018	1,664
1986	38	1997	98	2008	834	2019	1,733
1987	121	1998	241	2009	1,103	2020	1,625
1988	27	1999	759	2010	898	2021	2,428
1989	32	2000	343	2011	1,026	2022	2,263
1990	490	2001	926	2012	1,069	2023	1,769
1991	175	2002	2,358	2013	2,303	2024	1,344
1992	157	2003	1,468	2014	1,838	2025	1,053
1993	134	2004	2,033	2015	1,527	2026	572
1994	467	2005	1,172	2016	3,024		

Table 7 and Figure 4 show the age as a percentage of planted acreage.

Table 7. 2026 Age as a Percentage of Planted Acreage

Age	Acreage	Percentage of Planted Acres
Planting–4 years	4,739	8.5%
5–8 years	8,049	14.5%
9–15 years	12,604	22.7%
16–20 years	5,230	9.4%
21 years +	24,901	44.8%

Figure 4.
Age as a Percentage of Planted Acres

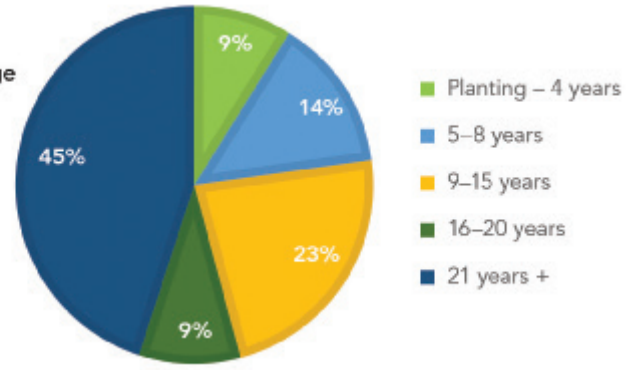
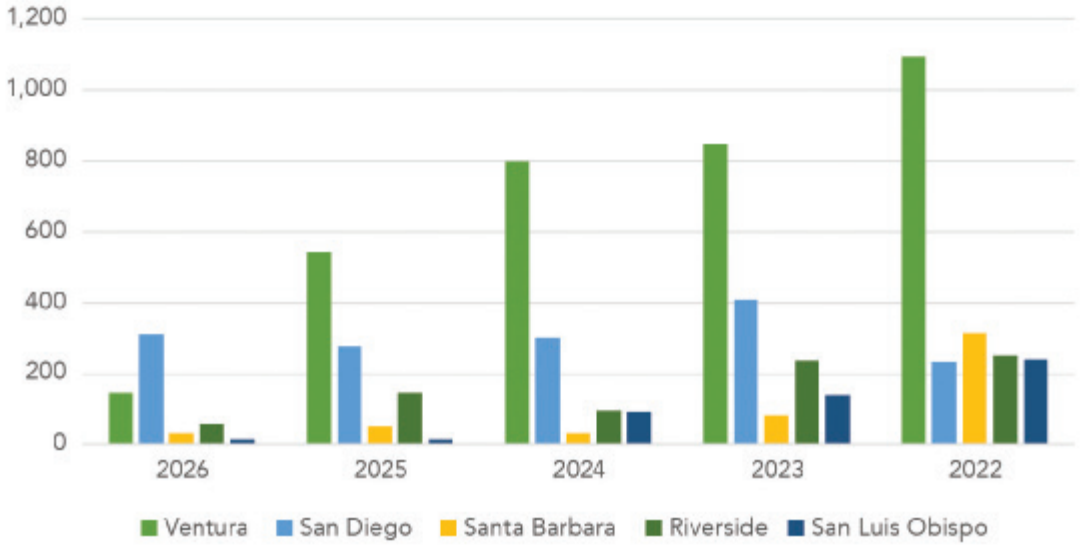


Table 8 and Figure 5 detail the acreage with a planting year within the last five years. This includes both newly established groves and older orchards that have been recently stumped, as the stumping process resets a grove's recorded planting year. The spatial analysis can only be performed once new groves have reached a certain canopy size. Thus, the acres reported for 2025 and 2026 are only those that have been visually confirmed through ground truthing efforts.

Table 8. New Acres by County and Planting Year

County	2026	2025	2024	2023	2022
Ventura	146	544	800	846	1,096
San Diego	312	276	304	410	235
Santa Barbara	32	52	31	81	315
Riverside	57	146	94	238	253
San Luis Obispo	14	15	92	141	238

Figure 5. Young Avocado Acreage by Planting Year



By Tim Linden

2026 Season Produced Mixed Results for California Growers

To be sure, California avocado growers have had some positive returns in 2026 with solid volume, good supplies and periods of a strong market. However, it also has been a disappointing season with large supplies of fruit from Mexico depressing the market for multiple months.

From the Grove interviewed shippers from three different California avocado handlers to get their perspective on the current season as well as any comments they might have regarding the 2027 season.

Keith Blanchard, field manager for Index Fresh, headquartered in Bloomington, CA, said that the industry's early projections of 330 million pounds of fruit have proven to be fairly accurate. However, he said the weekly harvest pattern included several notable deviations. "The season began more slowly than anticipated, with March harvests trailing early projections," he said, adding that volume did pick up in April and aligned more closely with expectations through May and into the summer. "While volume and sizing have been generally favorable, grower returns were disappointing for much of the 2026 season due to persistent pricing pressure," he said.

Blanchard reported that one noteworthy development has been the broader distribution of Hass and GEM avocados into markets east of California. "That wider Hass investment reflected retailer prioritization of produce grown in the USA in correlation to America's 250th anniversary promotions this summer," he said. "GEM distribution reflects increased GEM availability, marketing investment and growing market interest in the variety."

He said California saw a significant increase in GEM production during the 2026 season, with the growth expected to continue with the 2027 season. "This increased availability should create additional opportunities to expand customer awareness, distribution and demand for GEMs across a broader geographic footprint."

As he focused on the major market factors that influenced California growers in 2026, Blanchard said Mexican pricing pressure weighed on the California market and reduced the pricing environment available to domestic growers. He added that South American imports were less influential than they have been in recent years, making them a comparatively smaller factor in the market dynamic this season. "Although reduced South American pressure was helpful, it did not fully offset the impact of Mexican pricing on California fruit values," he added.

Concerning prospects for 2027, Blanchard said it is early but initial indications point to a very strong California crop, potentially exceeding 400 million pounds. "California growers have dealt with recurring heat concerns in recent years, and the industry is understandably monitoring conditions closely," he said. "However, the heat experienced so far in 2026 has not included the sharp, extreme temperature spikes that can cause the greatest concern for groves. Instead, the weather pattern has been more gradual and sustained, which trees generally tolerate better than sudden, severe heat events. At this stage, the recent heat has not materially changed expectations for the 2027 crop. The overall outlook remains positive, though weather conditions through the fall and winter will continue to be important to monitor."

He added there is some expectation that climate conditions in Mexico could affect fruit sizing, potentially resulting in a greater proportion of smaller sizes. "If that occurs, it could become a relevant factor in the U.S. market, particularly in relation to the size profile and competitive position of California fruit. For California growers, an El Niño weather pattern can be beneficial if it delivers meaningful rainfall without excessive storms, flooding or damaging heat events."

Blanchard concluded that the 2027 season is shaping up to be one

worth watching. "California appears positioned for a larger crop, GEM production is expected to continue expanding and weather developments in California and competing supply regions could influence both fruit size and market conditions," he said.

Gary Clevenger, managing member and co-founder at Oxnard, CA-based Freska Produce International, LLC, noted that from a production standpoint, California appears to be finishing close to the approximately 330-million-pound forecast estimated by the California Avocado Commission at the beginning of the season. "A substantial portion of the crop moved during the core summer season, with volume now winding down," he said in late September, adding that the market was challenging during much of that time. "Having fruit available in the right sizes helps, but it does not guarantee strong returns when overall supply is heavy. June provided a better pricing window within this season, yet prices were substantially below June 2025."

He reported that larger sizes did command better prices than the smaller fruit, but was not willing to call it a good season for most growers. "Results depend on yield, size mix, harvest timing and production costs," he said. "Meeting the crop estimate is encouraging, but the more important measure for growers is what they have left after expenses."

Clevenger said CAC's reported promotions with East Coast specialty retailers were a positive development with those programs giving California fruit exposure beyond its traditional markets and helping communicate what makes it worth choosing. "I would distinguish that increased visibility from a confirmed increase in total eastern shipments," he said. "The opportunity is there, but the program has to work economically after freight and handling. Clear California identification, consistent eating quality and retailer support are especially important when shoppers can choose a lower-priced imported avocado."

The Freska Produce executive did express concern about Mexico's production this season. "The volume of Mexican fruit in the U.S. market was a major influence. The September industry report showed Mexican shipments well ahead of last year, while arrivals from Peru and Colombia were lower," he said. "California growers were still competing in a heavily supplied market."

And he noted that the increased costs California growers must pay is problematic. "Water, labor, harvesting and other operating costs also make lower prices harder to absorb."

Clevenger said it is too early to make a reliable prediction on California's 2027 crop. "The immediate questions are how well the young fruit held through the (summer) heat and how the trees recover. Conditions can vary considerably between coastal and inland groves, so damage in one area should not automatically be applied to the entire industry," he noted. "El Niño adds another variable. Winter rainfall could help water availability, while excessive rain or prolonged wet conditions could create other problems. The timing and location of that weather will matter. At this stage, these conditions add uncertainty rather than justify a firm increase or decrease in the crop estimate. We need updated grove assessments before drawing that conclusion."

And he opined that Mexico's volume and timing will remain central to the market California growers face. For Peru and Colombia, he said an important question is how much fruit is directed to the United States compared with Europe and other destinations.

He did add that California growers do have opportunities to provide better results. "The priority is to build committed retail programs ahead of harvest and keep giving consumers a clear reason to choose California fruit," he said. "That puts growers in a better position than relying on a seasonal shortage to support the market."

Keith Barnard, senior vice president of global sourcing from Mission Produce, did comment on the recent acquisition of Calavo, but did not offer commentary on the 2026 or 2027 crops.

"Calavo is now part of Mission, bringing together two organizations with deep roots in the avocado industry. For growers, that means being connected to a broader sourcing, packing and distribution platform," he said. "We're excited to work with more growers across California. The state remains one of the most important growing regions in the category, and expanding our grower network further strengthens the foundation of our sourcing program. It also creates an opportunity to share the agronomic expertise, technical resources and operational support that Mission has developed across its global farming operations."

Barnard continued: "From a sourcing perspective, the combination is valuable because strong sourcing programs are built on both relationships and infrastructure. The California avocado industry has been built on generations of grower relationships, expertise and commitment to the category, and bringing those relationships together with complementary operational capabilities further strengthens the foundation of Mission's sourcing network."

He added: "California has been an important part of Mission's sourcing program for many years. The combination deepens those roots and reinforces our commitment to the state's avocado industry."

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