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**Calendar**

*For a listing of industry events and dates for the coming year, please visit:*  
<http://www.californiaavocadogrowers.com/commission/industry-calendar>

No events are scheduled for December 15, 2020 through January 1, 2021.

**2021 California Crop Estimate and Harvest Projections Released**

The California Avocado Commission has published the 2021 California Avocado Pre-Season Crop Estimate and weekly harvest projections for the calendar year (January 1st through December 31st). The estimate and projections are the result of handler surveys submitted in early December 2020 and represent the industry's best information on the coming season's crop at this time.

2021 California Crop Harvest Projection						Dec 2020 Handler Survey Hass Distribution
Month	Hass	Lamb	Gem	Other	Total	
Jan	2,577,700	-	-	199,600	2,777,300	0.8%
Feb	11,736,000	-	-	163,300	11,899,300	3.8%
Mar	26,529,900	-	-	53,500	26,583,400	8.7%
Apr	48,920,700	1,100	493,300	37,100	49,452,200	16.0%
May	54,689,900	21,500	698,100	27,700	55,437,200	17.9%
Jun	55,513,600	289,700	695,200	198,100	56,696,600	18.2%
Jul	50,099,500	4,526,600	105,500	146,100	54,877,700	16.4%
Aug	32,741,900	2,711,300	4,300	51,500	35,509,000	10.7%
Sep	19,244,500	1,241,900	3,600	69,600	20,559,600	6.3%
Oct	2,946,300	206,200	-	12,300	3,164,800	1.0%
Nov	-	1,700	-	3,900	5,600	0.0%
Dec	-	-	-	37,300	37,300	0.0%
<b>Total</b>	<b>305,000,000</b>	<b>9,000,000</b>	<b>2,000,000</b>	<b>1,000,000</b>	<b>317,000,000</b>	<b>100%</b>

Further details of the estimate and harvest projections can be found [online](#) and includes the following information:

- Pre-season industry volume estimates, broken down by variety, based on AMRIC Handler survey responses
- Weekly harvest forecast utilizing AMRIC Handler Survey percentages for Hass variety (4-year historical forecast used for Lamb, 2-year historical used for Gem and other)
- Weekly harvest forecast comparison of 4-year historical forecast versus AMRIC Handler Survey

The Commission staff will remain in contact with growers, handlers and grove managers throughout the season, via surveys and telephone conversations, to track harvest strategy and will provide updated forecasts to the industry as they become available. As we have done in the past, CAC will plan to follow up with the handlers in February to discuss crop volume and harvest plans before the season gets underway.

In addition to handler surveys and discussions, the annual grower crop survey and acreage inventory survey will be conducted in Spring 2021, with a mid-season crop estimate update available mid-May 2021.

## **CalOSHA COVID-19 Emergency Regulation in Effect**

The Office of Administrative Law approved the CalOSHA COVID-19 Emergency Regulation as adopted by the CalOSHA Standards Board. The Emergency Regulation is effective immediately. The emergency regulation is a mix of existing requirements found in current CalOSHA guidelines, definitions and requirements from AB 685 (Reyes) and new employer mandates.

Highlights from the emergency regulation are as follows.

### **Injury and Illness Prevention Program (IIPP)**

Employers must include COVID-19 information in their IIPPs, including by not limited to:

- A system by which employees can report COVID-19 symptoms, exposure and possible workplace hazards.
- A means of identifying COVID-19 hazards by screening employees, responding to COVID positive or exposed employees, and evaluating workplace activities or equipment that could lead to exposure. Employees must be allowed to participate in identifying and evaluating these hazards. Employers are responsible for correcting unsafe and unhealthy conditions and practices.
- Procedures to investigate and effectively respond to COVID-19 cases and notify those who may have been exposed within one day.
- Employee training concerning COVID-19 policies and protocols, COVID-19-related benefits available to employees, COVID-19 symptoms and the importance of remaining home when ill.

### **COVID-19 Protocols**

The regulation requires the following:

- Physical distancing and mask wearing are mandatory, unless they are not possible.
- Employers must provide masks and ensure they are worn over the nose and mouth when the employee is indoors or outdoors and not socially distanced from others.
- Face masks are not required if an employee is alone in a room, while eating and socially distanced in an indoor area where outside air is maximized, they are wearing other respiratory protection, cannot wear a mask due to mental/physical health conditions or performing tasks where masks aren't feasible.

- If physical distancing is not possible at fixed work locations, solid partitions must be installed.
- Outside air should be maximized in buildings unless outside air would be hazardous to employees.
- In employee-provided housing, residents who maintain a household together outside of work must be housed in the same housing unit without others. The same applies for residents who work in the same crew or work together at the same worksite. Employees who do not typically share a household or work together can only be housed in the same unit unless no other housing options are possible.
- Common areas of housing units must provide enough space for physical distancing, including sleeping areas. Housing units must be effectively cleaned and disinfected daily.
- Employee-provided transportation should be assigned such that employees residing in the same housing unit or working in the same crew/worksites should be transported in the same vehicle. Physical distancing measures and masks are mandatory. Vehicles must be cleaned and disinfected before each trip and between different drivers. Hand sanitizer must be available. Windows should be kept open and ventilation systems should not recirculate air.

### **Employee COVID Testing and Reporting**

- If there is a workplace outbreak, employers must provide free COVID-19 testing for all employees who were potentially exposed. They must be tested immediately and then one week later. Testing must continue on a weekly basis until the outbreak has ended.
- COVID-19 cases must be reported to the local health department as required by law. COVID-19-related serious injuries or deaths in connection with employment must be reported to CalOSHA.
- Employer must record all employee COVID-19 cases, including last day at the workplace and date of a positive test.
- Exclusion from the Workplace When COVID Positive or Exposed
- Employees who test positive or are exposed to COVID must be excluded from the workplace for 14 days, even if they test negative before the 14 days expire.
- Employer must continue and maintain the employee's earnings, seniority, rights and benefits while they must remain at home.

### **COVID Outbreaks at the Workplace**

- If an outbreak occurs, besides testing and employee exclusion (noted above), the employer must conduct an investigation to identify and abate COVID hazards. The review must be updated every 30 days until outbreak ceases.
- Employer must contact the local health department within 48 hours for guidance and to share outbreak workplace data.
- If there is a major outbreak (20 or more COVID cases within a 30-day period), employers also must use MERV-13 or higher filters within buildings, determine the need for respiratory protection program and determine whether to halt some or all operations until COVID-19 hazards have been corrected.

Full text of the [emergency regulation is available online](#).

## **Avocado Decision Support Tools Analysis Available**

Assistance with the decision support tools (DST) developed under the auspices of the California Avocado Commission to help growers optimize tree nutrition for greater yields is now available via a consulting service provided by Dr. David Crowley, UCR Professor Emeritus. This service will examine your leaf analysis data and generate a customized and confidential report showing where your orchard stands with respect to its yield potential. You will then receive a confidential report of the priority ranking for each nutrient element and its quantitative importance in affecting potential fruit yields. To access this service, growers should submit their leaf analysis report data by email. The DST analysis service will cost \$20 per report for each block, along with a nominal setup fee. For more information on the DST output, or to submit your plant analyses reports for a DST model run, email Dr. Crowley at [Avocado.DST@gmail.com](mailto:Avocado.DST@gmail.com).

## **California Avocado Recipes and Photography Encourage Consumer Demand for California Avocados**

Developing new California avocado recipes and stunning avocado beauty shots to accompany them are a highly impactful means of driving demand for the premium fruit. In the retail sector, shoppers most often “buy with their eyes” drawn to unique California avocado recipes paired with mouth-watering photos in point of sale and marketing materials. Likewise, the California Avocado Commission’s visually striking recipe section on CaliforniaAvocado.com remains the number one draw for visitors to the site. By piquing consumers’ interest with new recipes and fresh photography the Commission increases desire for the brand and ultimately encourages purchases of the Golden State fruit.

This season, the Marketing team crafted 48 new California avocado recipes and generated 158 photos. A total of nine new recipes and 22 photos were developed in partnership with the Commission’s Living Well Brand Advocates. Each of the nutritious recipes were designed to appeal to popular dietary lifestyles, including two recipes that — using the same ingredients and with slight adjustments — provided consumers with two meal options. A California avocado steak sandwich can be prepared as a steak salad; likewise California avocado granola bars can instead be made into sticky toffee bars — thereby transforming a breakfast or snack into a dessert.

Early in the season, the Commission secured 16 photos including whole/cut fruit shots, as well as grilling and Mediterranean Diet photos to accompany on-trend usage ideas for trade and online marketing purposes. The Commission’s Public Relations program also worked with chef partners who developed seven satisfying and visually appealing recipes that were photographed just prior to pandemic-related closures. In addition, throughout the 2019-20 season consumer blogger partners developed and posted numerous California avocado recipes and photos to their channels and websites.

Pivoting programs in response to COVID-19 and heightened needs for recipes and California avocado beauty shots for use at retail, a major retail-friendly recipe development and photo shoot project was executed virtually. Considering retailer recipe needs, including use in product demonstrations and cooking events that are expected to return post-pandemic, CAC developed recipes that are high in produce, use few ingredients and are simple to prepare. With the pandemic still raging, it was not possible for CAC staff to attend photo shoots in person. To maintain the continuity of their businesses, some photographers set up the technology for clients to view photo shoots remotely, which is what CAC did, providing guidance on matters such as avocado shape and color, prop selection and recipe preparation.

CAC produced a deep cache of recipes and photos covering everything from omelets to pies, salads to grilled dishes, guacamole and dip spreads, air fried avocados and a California avocado charcuterie board.

By creating new recipes and photography, the Commission expanded its catalogue of assets that can be used during the 2020-21 California avocado season and beyond. This season’s expansive recipe and photography development initiative provided an important refresh that will encourage repeat visits to the consumer website, expand fans’ perception of California avocado usage and pique shoppers’ interest in the years to come.



*The Commission’s Living Well Brand Advocate showcases grilled avocados, a hot trend, with sweet potato in a tasty salad loaded with nutrition.*

### California Market Trends

To view all market trend graphs, including “Weekly Volume Summary,” “Weekly Avocado Prices” and “U.S. Avocado Supply,” please visit: <http://www.californiaavocadogrowers.com/industry/market-statistics>.

California Avocado Society Weekly Newslines\* Avocado Prices – December 8, 2020

	Conventional #1	Organic #1
<b>California Hass</b>	<b>(Field Price Per Lb)</b>	<b>(Field Price Per Lb)</b>
#32’s		
36’s		
40’s		
48’s	Insufficient Volume to Quote	
60’s		
70’s		
84’s		
*To subscribe to the Weekly Newslines, please contact the California Avocado Society at (949) 940-8869 or <a href="http://www.CaliforniaAvocadoSociety.org">www.CaliforniaAvocadoSociety.org</a> .		

## California Avocado Commission Weekly Volume Summary (Pounds)

	Week Ending 12/13/2020	Season-to-Date (since 11/01/2020)	2020 Year to Date
Hass	125,763	6,334,616	364,943,922
Lamb	0	0	11,169,186
Other (Greens)	7,831	29,366	1,628,786
<b>California Total</b>	<b>133,594</b>	<b>6,363,982</b>	<b>377,741,894</b>
Florida	324,060	3,370,070	31,816,455
Chile	0	0	2,445,132
Mexico	46,130,357	291,073,613	2,102,555,486
Peru	0	0	184,299,619
Other (Imports)	0	6,340,000	46,130,000
<b>Import Total</b>	<b>46,130,357</b>	<b>297,413,613</b>	<b>2,335,430,237</b>
<b>USA Total</b>	<b>46,588,011</b>	<b>307,147,665</b>	<b>2,744,988,586</b>

Sources:

California = CAC (AMRIC)

Florida = Florida Avocado Admin Committee

Chile = Comite de Paltas, Chile

Mexico = APEAM

Peru = ProHass

Other Imports = USDA AMS website

### Crop Statistics

The 2020 California avocado season has finally wrapped up harvest, over two months after the close of CAC's fiscal year. On a fiscal year basis, November 1, 2019 through October 31, 2020, the 2020 crop brought in 375.5 million pounds, just 2.5 million pounds more than the mid-season estimates of 373 million pounds. As we all saw, however, the 2020 crop still had more to give, with carryout harvest continuing through December 9, and bringing in additional volumes of approximately 6 million pounds. The 2020 crop was harvested at over a million pounds a week, for 47 weeks in 2020, resulting in a final total crop volume of about 382 million pounds. The varietal breakdown of the 2020 crop came in at 368.2 million Hass, 11.1 million Lamb Hass, 1.5 million Gem and 1.2 million Other.

With the 2020 crop finally complete, the industry already has its eyes set on what next year may bring. The Commission has finalized crop surveys with handlers resulting in a 2020-21 pre-season California crop estimate of 317 million pounds (all varieties). The pre-season estimate of 317 million pounds breaks down as follows:

- Hass - 305 million pounds
- Lamb - 9 million pounds
- Gem – 2 million pounds
- Other - 1 million pounds

The pre-season estimate also includes monthly and weekly harvest projections, a summary is shown in the chart below, details of which can be found by clicking [here](#).

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Jun	55,513,600	289,700	695,200	198,100	56,696,600	18.2%
Jul	50,099,500	4,526,600	105,500	146,100	54,877,700	16.4%
Aug	32,741,900	2,711,300	4,300	51,500	35,509,000	10.7%
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### Weather: 30-Day Outlook For California's Coastal & Valley Areas

(December 15 – January 11)

Summary- A *La Niña* pattern is expected to persist through Jan 2021. It continues in February, although weaker. For California, this argues for drier than normal in the central and south portions, and wetter than normal in N California from late Jan - Feb. Heaviest rainfall will tend to focus Mendocino County north, and in the Pacific Northwest states. Occasionally, we may see some troughs develop over Arizona, S-SE California, and NW Mexico.

Activity of Fronts - We will see frequent frontal passages into northern California, Oregon and Washington with rains, and a tendency for higher than normal snow levels, while dry and warm periods persist or recur in Southern California. Despite the tendency for warm dry upper high pressure, there is a chance for some cold arctic surges to develop, with the usual frost/freeze events in S California and the San Joaquin Valley. Some of these may occur in mid to late Dec but are most likely in Jan, particularly in mid to late Jan and early Feb.

*La Niñas* and Precipitation Trend – *La Niñas* produce the best environment for atmospheric rivers into northern California and Oregon, with main focus into coastal areas of the Pacific Northwest. The northern Rockies and Great Basin also see above normal precipitation, but with persistently high snow levels for N and Central California (Sierras). Although more seasonable conditions for rain develop in NW California, the long term seasonal trend for Southern California will tend well drier than normal. As dry cold fronts come through, there is risk of cold Santa Anas, with damaging winds. In Southern California, *La Niñas* tend to have long fire seasons, and intermittent recurrence of fire conditions during the winter months (Dec, Jan, Feb).

Current Most Likely Precipitation Dates - (from our CFSDaily product out 30 days): For the near term, rains develop Dec 16-17 at the coast of N California – Bay Area. Some subtropical rains occur on 21-22 Dec through N and Northcentral California/Bay Area. Warm and dry 24-25. Rains 28, 30- 31, and again Jan 11-12, and Jan 18-22.

In S California - Most Likely Precipitation Dates: Dec 23...a few showers in the Tehachapi's at the southern end of a cold front. Other dates: Jan 12, and San Luis Obispo Co Jan 20-22 few showers. These are based on our CFSDailyAI forecast system.

SOCAL Santa Anas and Freezes - The main issue for SOCAL is the recurrent downslope/offshore wind events of Santa Anas. January is currently looking significantly dry. With that dryness often occurs Santa Ana winds. The cold Santa Anas of winter often associate with the strongest winds, and cold events. Freezes and wetbulb freezes (wetbulb temperature below 32, often occur in cold Santa Ana events). Hard freezes (temperature 29 or lower) can occur on dry clear nights if wind speeds decrease to calm in valley areas overnight.

The NORCAL Coast Precipitation - (Mendocino County north) and Cascades from Mt Lassen northward have a good chance for below normal precipitation in January. February appears to have above normal precipitation for NW California, and otherwise near normal precipitation for northcentral and remainder of N California. Temperatures also appear near or above normal for the most part.

*La Niña* seasons are not favorable for subtropical jet stream formation, or significant rains into SOCAL.

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The listing of dates normally included for hot and cold spells, and precipitation are based on our CFSDaily and CFSDailyAI forecast products, and present generally expected trends in precipitation (both products) and temperature (CFSDailyAI) to 4km. Our system gives some consideration of terrain and coastal influence. We consider the CFSv2 as one of the better ways to represent basic weather down in the sub-monthly time scale beyond the 15 day GFS or monthly maps from CFSv2 or NMME.

Mostly warmer and drier than normal. Dates for showery periods appear at this time to be Dec 20-22 in San Luis Obispo Co. Also, on Jan 11-12: San Luis Obispo Co to Los Angeles and San Bernardino Co's, the high deserts, and into NW Arizona/S Nevada Mt Charleston area. Coldest spells occur 18 Dec, 22-23 Dec, and 10-12 Jan 2021.

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**\*\*\*Looking Ahead – Long Range Outlook Jan 15-Mar 15 with Comments for Apr-June\*\*\***

A dry and warm early winter continues to be indicated in Jan after some rains in December (mentioned above). Watch for a turn to colder than normal with higher than normal incidence of freezes and frost in SOCAL during Feb and Mar 2021, both in northcentral California Viticultural region, as well as SOCAL avocado/citrus areas.

Jan 15-Feb 15 2021 Highlights:

A well defined La Nina s currently indicated for the early spring period. For precipitation in California this is unfavorable news. With colder than normal sea surface, the energy available to drive the westerlies in the central and eastern N Pacific will tend to be well below normal. This supports predominantly weak westerlies in the southern storm track through this normally active period for late winter and early spring 2021. Continued seasonably wet or possibly above normal precipitation in Pacific Northwest states (Washington, Oregon and Idaho), and below normal precipitation, i.e. warmer and drier than normal in California. With the dry fall, this could be one of the driest November – February seasons we have seen in a long time. The period of mid to late January, per the latest CFS Daily 45 day forecast product, rains are currently indicated by the model, but amounts are persistently small.

This pattern also argues for recurrent Santa Ana wind events the last week of Jan and early Feb. We will hang out a little hope for some rains in the Feb 10-18 time frame, which is normal, but the rains may turn out to be spotty and light, according to current guidance.

For Feb-Mar 2021, NMME guidance suggests: cooler than normal at the NORCAL coast with recurrent dry N wind events. Not sure that we're going to see that near normal rainfall in Feb that we were previously mentioning. Statistically wettest periods of Feb are 8-12, 13-18 , and 26-28.

Feb 15-Mar 15...

The pattern is basically unchanged. Strong La Nina conditions persist along the equatorial central and east Pacific, and below normal energy to drive the southern branch of the westerlies again.

For SOCAL in Feb, due to *La Niña*, it may be difficult to realize precipitation approaching normal. There is no definable trend, other than below normal precipitation at this time.

April-May-June 2021

Continued drier than normal. Under these conditions, expect an early start to the 2021 fire season. In fact, the North American Multi-Model Ensemble (NMME) shows above normal sea surface temperatures in April-June in the midlatitude eastern N Pacific, and associated drier and warmer than normal for May-June. June currently looks unusually warm with persistently hot conditions in N California forest areas at the start of the fire season.

Statistically, the period Jan 2-10 is usually an active one, for storms. Jan 12-22 is statistically a cold period with freezes between rain events. This Jan in N California, we expect subnormal rainfall, so the 12-22 is more likely to be dominated by frost and freeze events, and persistent valley haze and fog in the San Joaquin Valley. Jan 23-31 can still experience some of the mid-winter pause in storminess in N California as the storm track focuses into the Pacific Northwest. During wet seasons, this is usually a time for the southern storm track to dominate and bring rains into southern and central California.

Alan Fox...Fox Weather, LLC

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