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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>

CAC Marketing Committee Web/Teleconference

February 16

February 16

Time: 10:00am – 12:00pm

Location: Zoom Web/Teleconference

San Diego County Growers Encouraged to Complete Crop Report Questionnaire

The 2020 Crop Report Questionnaire was recently mailed to San Diego County growers to collect important crop data — such as crops grown, yield and gross value — utilized by the County of San Diego's Agriculture, Weights and Measures department. The deadline to complete the questionnaire is February 28, 2021.

Responses from the questionnaire remain confidential and are used to compile relevant statistics for the annual Crop Report and is not shared with other agencies. The data helps identify:

- The top 10 crops in San Diego County
- New and emerging crop trends
- The overall value agriculture provides San Diego County
- The county's statewide production ranking

In addition, the data plays an important role in helping elected officials make policy decisions, determining financial assistance during disaster declarations, assisting financial institutions and government agencies to make decisions about farm loans, and helping educate the public about the important role agriculture plays in the economy.

If you did not receive a questionnaire by mail, you can [download a copy of the questionnaire from the SDAWM website](#) or contact Porfirio Macillas at Porfirio.Mancillas@sdcounty.ca.gov.

Completed questionnaires may be faxed to 858.467.9697, emailed to Porfirio.Mancillas@sdcounty.ca.gov or mailed to:

Office of Agriculture, Weights and Measures
9325 Hazard Way
San Diego, CA 92123

Important Notice for San Diego TSAWR Customers

Agricultural customers in the San Diego County Water Authority service area should be aware the Transitional Special Agricultural Water Rate program became the Permanent Special Agricultural Water Rate program as of January 1, 2021. For those currently enrolled in the TSAWR, they will be automatically transferred to the new PSAWR and can remain in the program through June 30, 2021.

However, in order for previous TSAWR customers to remain in the PSAWR program beyond June 30, agricultural customers must complete an application for the PSAWR program and be in one of the four eligibility programs:

- San Diego Growers List - Pesticide Use
- Active Certified Producers Certificate – County of San Diego
- Organic Producers - United States Department of Agriculture
- San Diego Regional Water Quality Control Board General Agricultural Order Enrollment Program

The PSAWR program will be open to new qualified participants and there is no minimum amount of land that must be dedicated to agricultural purposes in order to qualify.

Water districts will be contacting agricultural customers to remind them to enroll in PSAWR before June 30. For more complete information about the PSAWR, download the SDCWA's [PSAWR Handbook](#).

Commission's "Summer" Ad Earns Gold in Bowery Awards

On December 1, the California Avocado Commission's animated "Summer" advertising from "The best avocados have California in them" campaign was awarded a gold prize at the Bowery Awards. The ad, which shows animated California avocados sunbathing around a swimming pool and going down a slide into the pool, won gold in the Film Craft/Motion Video: Discipline — Animation category. The Bowery Awards, named after a New York City area that is famous for being a hotspot for creativity and culture, is a new virtual competition for professional creatives who work independently within the commercial world.

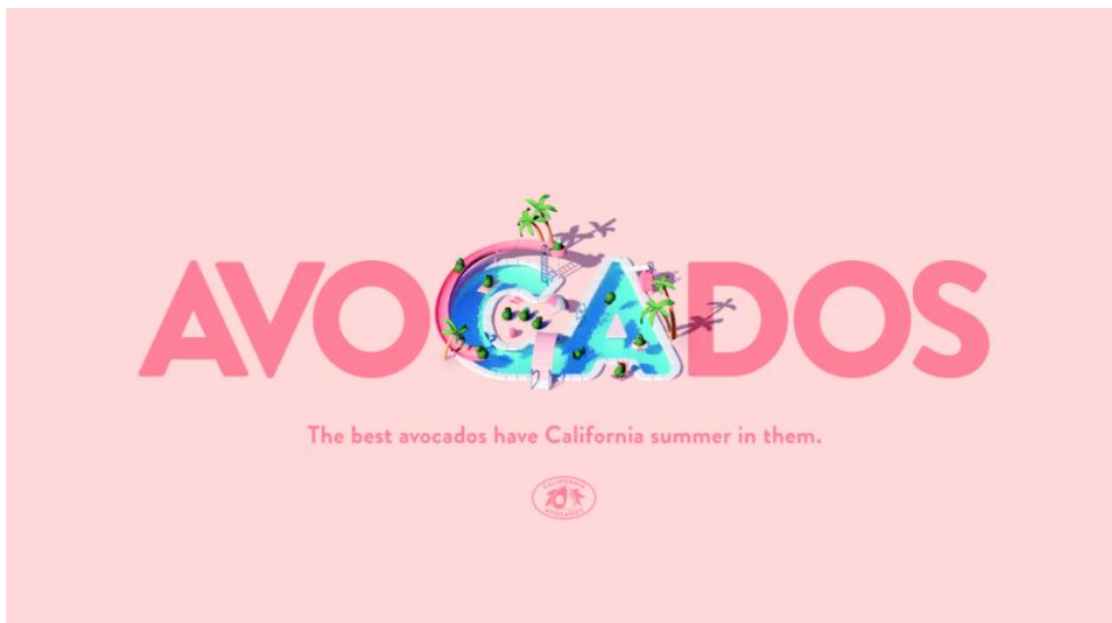
The Commission partnered with FOREAL, a design team based in Germany that focuses on high-end Computer-Generated Imagery animation, illustration and art direction, to craft a 15 second, CGI animated video based on their static "Summer" campaign piece. By partnering with the Commission, FOREAL was eligible to participate in the new competition and generate industry-wide awareness for the California Avocados brand.

CAC's "Summer" ad also was very well liked by avocado shoppers. In June, participants in an independent Instapanel study reviewed examples of the Commission's ad campaign executions and the "Summer" artwork was the "most liked" and "least disliked" concept, with an 88% rating of 4 or 5 and an average score of 4.30. "Summer" was among the three 15-second videos that performed strongest in likability and visual appeal. The summer setting of this ad spoke directly to many panelists — with some specifically saying the ad made them excited about summer.

Further, the "Summer" ad spot was most associated with key positive attributes: fun, memorable, imaginative, exciting, energetic, inviting and friendly. Notably, respondents were 20% more likely to view "Summer" as entertaining in

comparison to the other spots that featured California avocados.. Many panelists liked the direct connection between the ad, California and the avocados sunning themselves around the pool. As Vanessa, a panelist from Oregon, noted, “I loved the little characters, and ...how they’re tanning. It makes you really think of California because when you think California you think beaches...sun...them just chilling next to the pool, then it has the CA stand out again, and it perfectly reminds you of avocados.”

Ultimately, the “Summer” ad has proven itself a winner — by both advertising industry and consumer standards. The insights gained by the consumer test panel and the recognition by the creative collective of the Bowery Awards provides the Commission’s marketing team with valuable direction for the 2021 marketing season.



The “Summer” campaign piece created by FOREAL using CGI animation truly brings California avocados to life.

California Avocados Shine at the Worlds of Flavor and Flavor Experience Virtual Conferences

To generate excitement about the 2021 California avocado season, members of the California Avocado Commission foodservice team attended two virtual conferences to learn about flavor trends in the foodservice industry as well as to showcase the benefits of the Golden State fruit, while networking with key decision makers.

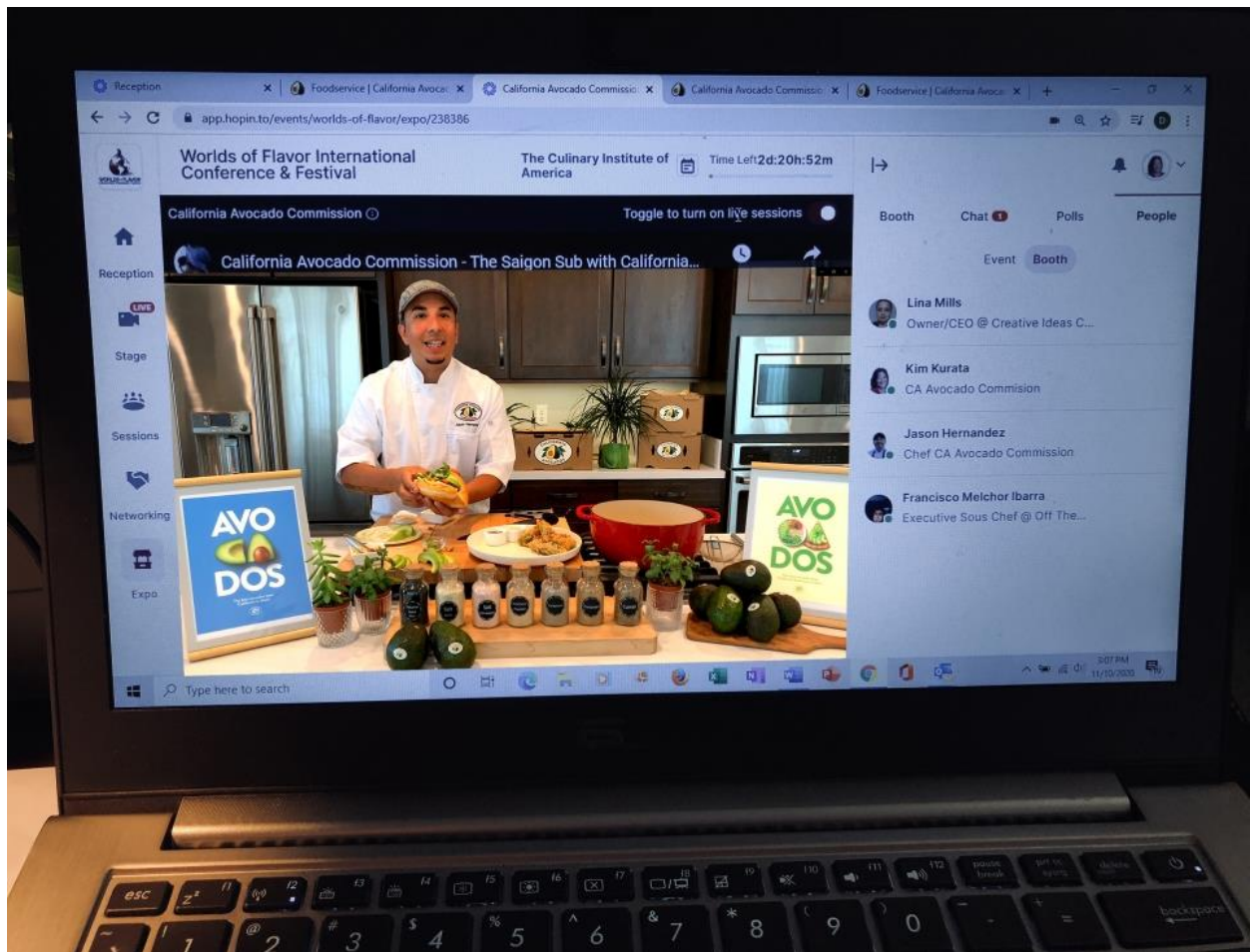
The Worlds of Flavor: World Kitchens, World Tables virtual conference took place November 10 – 13 attended by menu developers and decision makers from non-commercial foodservice operations, independent restaurants and chains. The Commission’s foodservice team presented a mix of pre-recorded food demonstrations and participated in live Q&A sessions hosted in a virtual sponsor “booths.” The team also joined two-minute online networking sessions where they were randomly paired with operators and given the opportunity to highlight the benefits and seasonality of California avocados.

At Flavor Experience, which took place from December 1 – 2, California avocados were featured in a dedicated eight-minute sponsored segment of the conference program. CAC foodservice team members shared pre-recorded food preparation videos and took part in a Q&A session. They also met one-on-one with key contacts in a series of arranged “speed dating” meetings. The Commission’s sponsor content was rated “best in show” in a survey of more than 100 attendees and cited as both memorable and useful.

Both events provided the Commission with opportunities to keep fresh California avocados top-of-mind with professionals looking for new ideations for their menus and established the potential for continued and new promotional partnerships for the 2021 season.

Commission staff discussed California avocados' value and their impact on the menu with a wide range of representatives. At Worlds of Flavor, they established 32 contacts with: American River College, Aramark, Ashland Public Schools, Bon Appetit @Google, Compass Group, Elio Hospitality, Facebook, Great American Hospitality, Harvest Table Culinary Group, Kansas State, Kum & Go, Kumquat360, Marriott, Natick Labs, NC State, Nordstrom, Oak Park USD, Off the Grid, Peets Coffee, Sacramento County Office of Education, Santa Clara County Office of Education, Schoolcraft College, Sodexo, Sonoma State, SUNY, TCU, University of Iowa, USC, Wegmans, Wyndham Grand Clearwater and Xoc Tequila Grill.

At Flavor Experience, they spoke with an additional 38 contacts from: Another Broken Egg, BJs Restaurants, Blaze Pizza, Buffalo Wild Wings, Cheesecake Factory, Chili's, Del Taco, El Dorado Cantina, Farmer Boys, Fazoli's, Grill Concepts, Houlihans/Landry's, IHOP, Kum & Go, Lazy Dog, Logan's Roadhouse, Luna Grill, McAlister's, Mooyah, NBC Universal, Nordstrom, On the Border, OTG Group, Papa John's, Rubio's, Sammy Hagar Restaurants, Shari's, Sodexo Artisan Restaurants, Sonic Drive-In, Sonoma State, TGI Fridays, Tropical Smoothie Cafe, Twin Peaks, WaBa Grill and Walk-Ons Enterprises.



Pre-recorded video with Chef Jason Hernandez discussing flavor pairings and adding a California twist to a global dish.

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 – January 12, 2021

	Conventional #1	Organic #1
California Hass	(Field Price Per Lb)	(Field Price Per Lb)
#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 www.CaliforniaAvocadoSociety.org.

California Avocado Commission Weekly Volume Summary (Pounds)

	Week Ending 1/17/2021	Season-to-Date (since 11/01/2020)	2021 Year to Date
Hass	0	6,334,616	0
Lamb	0	0	0
Other (Greens)	10,120	47,965	17,480
California Total	10,120	6,382,581	17,480
Florida	170,830	4,658,830	755,590
Chile	0	0	0
Mexico	78,245,163	577,321,227	188,476,009
Peru	0	0	0
Other (Imports)	1,170,000	11,640,000	3,940,000
Import Total	79,415,163	588,961,227	192,416,009
USA Total	79,596,113	600,002,638	193,189,079

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

Below are the weekly harvest projections and actuals for the first quarter of 2021. As seen in the table below, weekly projections indicate modest harvest in the first part of the year, with only 11-13 percent expected to go to market through week ending 3/28/21, and the majority of that volume not projected to be harvested until March. The first few weeks of January has seen very limited harvest of only “Other” varieties, with no Hass harvested year-to-date. It is important to keep in mind that these projections are over a month old and current market conditions will likely dictate how much of the California crop will actually be harvested in the early part of the year. The Commission is continuing discussions with industry members and will update harvest projections for March through the end of the season after the Big Game in February. In addition, early season wind events have hit many regions and so CAC will be working to gauge how these events may have had an impact on total crop volume. With all this in mind, as growers prepare for the start of the season, the Commission recommends that growers communicate with their handlers and grove managers on a regular basis to plan their harvest strategy.

2021 California Crop Weekly Harvest Projection				
Weekly Crop Movement vs. Distribution Projections				
All Varieties				
	4-Year Historical Forecast	AMRIC Handler Forecast	Industry Adjusted	
Week Ending (CAC Week)	2021 Crop Estimate	Dec 2020 Update	AMRIC Harvest	AMRIC Shipments
Jan 10 - (10)	69,000	56,000	8,096	38,858
Jan 17 - (11)	434,000	361,900	10,120	40,143
Jan 24 - (12)	965,400	793,400	-	-
Jan 31 - (13)	1,926,800	1,566,000	-	-
Feb 7 - (14)	2,202,100	2,567,600	-	-
Feb 14 - (15)	1,601,200	1,878,300	-	-
Feb 21 - (16)	2,346,000	2,757,000	-	-
Feb 28 - (17)	3,998,900	4,696,500	-	-
Mar 7 - (18)	5,414,600	6,751,600	-	-
Mar 14 - (19)	5,832,100	7,274,700	-	-
Mar 21 - (20)	5,812,600	7,249,900	-	-
Mar 28 - (21)	4,253,400	5,307,200	-	-
1st QTR SubTotal	34,856,100	41,260,100	18,216	79,001
2nd QTR SubTotal	167,788,200	161,586,100	-	-
3rd QTR SubTotal	103,720,000	107,900,600	-	-
4th QTR SubTotal	10,635,700	6,253,200	-	-
Season-to-Date	503,000	417,900	18,216	79,001
% of Crop	0%	0%	0%	0%
Crop Size	317,000,000	317,000,000	Left to Harvest	Left to Ship
Crop Variance	(484,784)	(399,684)	316,981,784	316,920,999

Weather: 30-Day Outlook For California's Coastal & Valley Areas

(January 11-31)

Summary- A *La Niña* pattern is expected to persist through Mar 2021. It continues in February and well into March. For California, this argues for drier than normal in most of California, and seasonably wet in the Pacific Northwest and far NW California during at least Jan and most of Feb. Heaviest rainfall will tend to focus Mendocino County north, and in the Pacific Northwest states. On infrequent occasions, zonal flow conditions (wet west flow) periods occur, and may produce some rains of significance into Central and Southern California, Nevada and Arizona.

Activity of Fronts - We will see more frequent frontal passages into northern California, Oregon and Washington with rains, and a tendency for higher than normal snow levels overall. Mixed in with these overall dry and warm conditions will be an occasional unusually cold and snowy event with low snow levels in central and southern California. Despite the tendency for warm dry upper high pressure, there is a chance for a few arctic surges to develop, with the usual frost/freeze events into S California and San Joaquin Valley. These are most likely in mid to late Jan and mid Feb.

La Niñas and Precipitation Trend – *La Niñas* produce the best support environment for atmospheric rivers into NW California, Oregon-Washington, and British Columbia. Main focus is into coastal Pacific Northwest. The north parts of the Rockies and Great Basin also see above normal precipitation, but with recurrently high snow levels for N and Central California (Sierras).

Although more seasonable conditions for rain may develop in N and NW California for short periods, the long term seasonal trend for most of California, and especially SOCAL, will tend to be drier than normal. As dry cold fronts come through, there is risk of Santa Ana wind events, some with damaging winds, mainly late Jan and in first half of Feb. In Southern California, *La Niñas* tend to produce long fire seasons, and intermittent recurrence of fire conditions during the winter months (Jan, Feb, Mar).

Current Most Likely NORCAL Precipitation Dates (from our CFSDaily products out 30 days): Rains Jan 13. Rainy again Jan 24-27, In Feb, current rain dates are Feb 6-7-8, and Feb 12-13 and Feb 19-20.

In S California - Most Likely Precipitation Dates: Jan 26-28, and Feb 6-8, 12. Other rains are currently suggested for 19-20 Feb.

SOCAL Santa Anas and Freezes - The main issue for SOCAL is the recurrent downslope/offshore wind events of Santa Anas. January is fairly dry for SOCAL. With that dryness often occur Santa Ana winds. The cold Santa Anas of winter often associate with strong damaging winds and freeze events. Freezes and wetbulb freezes (wetbulb temperature below 32), often occur in cold Santa Ana events. Hard freezes (ambient air temperature 29 or lower) can occur on dry clear nights if wind speeds decrease to calm in valley areas overnight. Freezes then Santa Anas then freezes occur in S California after the rains of 24-27 Jan.

The Cascades from Mt Lassen north to Oregon border have a good chance for below normal precipitation in second half of Jan. February appears to have support for frequent dryness or subnormal rain. Exception is the snows of 23-27 Jan. Jan and Feb are normally the best months for winter precipitation. Temperatures also appear near or above normal for the most part during this coming spring (Feb-Mar).

The NORCAL Coast Precipitation periods: - (Mendocino County north): Precipitation dates: Jan 12-13, 22-23, 24-27, Feb 12-13. Feb 19-22.

Sierra Nevada best chance for Precipitation: 24-27 Jan, 6-8 Feb, and 18-29 Feb.

Freezes in north and northcentral California: 15 Jan, 21-22 Jan, several occasions within the period 25-30 Jan, 9-11 Feb. Freezes in central coast region...suggested by cold daytimes outside of rain occurrence:, 24, 28-30 in Jan, and Feb 8.

Freezes in central and southern California 21-22 Jan, (including San Joaquin Valley and Delta). Coldest periods are: 28-30 Jan, 7-10 Feb from our CFSDailyAI model.

La Niña seasons are not favorable for subtropical jet formation, or significant rains into SOCAL. However, this winter, the anomalously warm SST's (positive SSTA) continuing to the west of California and out into the central Pacific may contribute additional support for upper high pressure to persist at times in Feb as well as contribute moisture for infrequent SOCAL storms (see Figure 3).

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.

Southern California Deserts Outlook for Jan 15-Feb 15: Mostly warmer and drier than normal, but less warm than earlier in the winter. There is also more risk for frost as well as showery/windy/cold periods.

Jan 24-27 continues to consistently have the highest probability of significant rains and mountain snows, with gusty winds with cold weather in the SOCAL southern and eastern Deserts.

*****Looking Ahead – Long Range Outlook Feb 7-Mar 31 with Comments for Apr-June*****

Warmer and drier than normal overall. Exceptions appear to be: Colder than normal 7-10 Feb in particular, with higher than normal incidence of freezes and frost in SOCAL during Feb and Mar 2021, both in southern and eastern deserts as well as SOCAL avocado/citrus areas. If the upper lows are strong enough, rains, instead of frosts/freezes are possible. In either case, troughing is expected to be more frequent in late Feb and Mar for California as a whole.

...Feb 8-Mar 31, 2021 Highlights:...

A well defined *La Niña* is currently indicated for the early spring period. However, if troughing focuses into the area NW of Hawaii, we may see a return of troughing in the early spring period (Feb-Mar) as mentioned above, with cold troughs, and showers into central and southcentral California. In a *La Niña* situation, this would be our best chance for retrieving some rain and mountain snow (SierraNV).

This supports predominantly weak westerlies in the southern storm track off southcentral and S California through this normally active period for late winter and early spring 2021. Continued seasonably rainy/snowy 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, interrupted, as mentioned above, by an occasional trough in California with showers and low snow levels.

From the latest CFSDaily 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 as fronts with sparse rain amounts push through from NW to SE.

We will offer a little hope for some rains in the Feb 12-18 time frame, which is normal, but rains may turn out to be spotty and light, according to current guidance.

For Feb-Mar 2021, NMME guidance suggests: near normal temperatures at the NORCAL coast with recurrent dry N wind events. Drier than normal conditions are indicated by CFSv2 for Feb. The statistically wet periods of Feb are 13-18 , and 26-28 – 4 Mar.

Feb 23-Mar 23...the pattern is basically unchanged. Strong *La Niña* conditions persist along the equatorial central and east Pacific, and below normal energy to drive the southern branch of the westerlies.

For SOCAL in Feb, due to La Nina, it may be difficult to realize precipitation approaching normal. There continues a chance for cold troughs to develop in California and perhaps some occasional relief from the stark dry scenario.

April-May-June 2021... continue drier than normal in the current CFSv2 model simulation. Under these conditions, we would suggest an early start to the 2021 fire season. In fact, the North American Multi-Model Ensemble shows above normal sea surface temperatures in April-June in the midlatitude eastern N Pacific, and associated drier and warmer than normal conditions for May-June.

Alan Fox...Fox Weather, LLC

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