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Calendar

Several meetings for the month of March have been cancelled. Please see the following link for more information on upcoming events: <http://www.californiaavocadogrowers.com/commission/industry-calendar>.

California Avocado Commission 2020 Annual Meetings Cancelled

In light of the current public health situation, and out of an abundance of caution, the California Avocado Commission (CAC) Annual Meetings scheduled for March 24-26, 2020 have been cancelled.

The Commission is currently working to identify alternative plans to ensure growers receive the latest updates regarding CAC's 2020 marketing campaign and will communicate those plans through the GreenSheet, CAC's e-newsletter. If you do not currently receive the GreenSheet, please be sure to [sign-up today](#).

GreenSheet Readers Encouraged to Complete Commission's Three-question Survey

To ensure GreenSheet readers have the opportunity to receive information most relevant to them, the California Avocado Commission (CAC) has emailed GreenSheet readers a three-question online survey asking readers to submit their grove zip code. By collecting the zip codes, the Commission can create segmented distribution lists that will allow growers to receive GreenSheet newsletters customized by region.

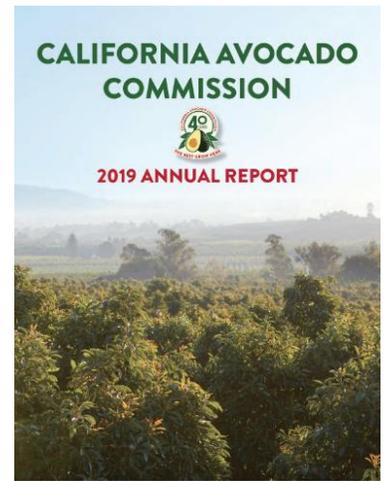
If you have not already completed the online survey, the Commission encourages you to do so [now](#).

2019 CAC Annual Report Available Online

The 2019 Annual Report includes financials and industry statistics, and showcases the Commission's activities during the past year including:

- Initiatives celebrating the Commission's 40th anniversary

- Successful continuation of the Made of California Campaign utilizing non-traditional channels
- Premier ads on the premium food genre sector of Hulu’s digital television platform
- Newly designed recipe portion of the CaliforniaAvocado.com website
- Mythbuster consumer content showcased on digital and social media channels
- Robust reach of integrated public relations campaigns, including blogger advocate content (799 million impressions)
- Strategic geo-targeted social media retailer ads and a successful first-time GPS-driven digital campaign on Waze
- Retailer promotions that created opportunities beyond point-of-sale in deli/catering retailer sectors and on digital and social media channels
- Boosts in sales volume for export promotions in South Korea
- Advocacy efforts focused on the Farm Bill, labor concerns, access to foreign markets and the passage of the Farm Workforce Modernization Act
- Efforts to secure exemption for California avocado growers from the Central Coast Regional Water Quality Control Board’s Ag Order 4.0
- Actions taken to address concerns about wildfire risk management and initiatives to keep growers updated concerning Public Safety Power Shutoff protocols and threatening weather conditions
- CAC-sponsored growers seminars, including low-cost Food Safety Modernization Act Produce Safety Alliance training sessions
- Networking with industry leaders at the World Avocado Congress
- Completion of the 2018 Statewide Avocado Acreage and Condition Analysis report
- Ten-year Industry Statistical Data
- Audited Financial Statements for 2018-19

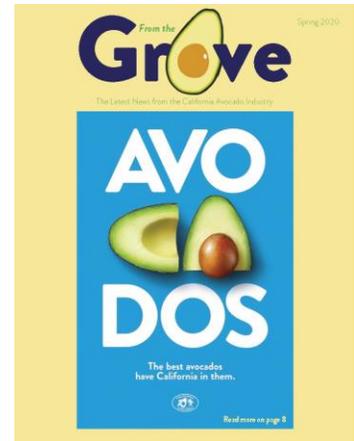


Spring 2020 Issue of From the Grove Available Online

The California Avocado Commission (CAC) has published the Spring 2020 issue of From the Grove [online](#) and as a downloadable [pdf](#). The latest issue includes the following highlights:

- CAC President Tom Bellamore shares highlights from the Hass Avocado Board’s commissioned [report](#) from the Centre de Cooperation International En Recherche Agronomique Pour Le Developpment
- [CAC Chairman John Lamb](#) reflects on the start of the current season and discusses the importance of sustainability
- An extended look at the Commission’s new “[The best avocados have California in them](#)” consumer campaign and how [CAC’s trade marketing](#) is aligned with the new creative

- A celebration of the Commission's [eighth consecutive Marketing Excellence award](#)
- An overview of [California avocado organic sales figures](#) and the future of the market
- Highlights from the Commission's [public relations season-opener campaign](#)
- CAC Vice President of Industry Affairs Ken Melban provides an [overview](#) of the Farm Workforce Modernization Act and new advances concerning a Phase I trade agreement with China
- A look at recent research efforts to map the [genomic landscape of avocados](#)
- An in-depth look at the rise of [avocado branch canker disease](#) and current management recommendations
- A compelling profile of [California avocado grower Norm Kachuck](#)



Hass Avocado Board Seeks Nominations

The Hass Avocado Board (HAB), which serves the interests of global avocado industry stakeholders in an effort to stimulate and sustain U.S. market expansion, is [seeking industry experts to join its 12-member board](#). HAB board members meet four times a year.

HAB has mailed announcements of vacant seats to all eligible producers and importers of Hass avocados. Nomination forms are due March 30. The [Avocado Producer Member and Alternates Form](#) and [Avocado Importer Members and Alternates form](#) are available online.

Ballots will be mailed on April 27 and must be received by May 25. The board will announce the nomination results by June 8 and will submit two nominees for each position for consideration by the USDA Secretary of Agriculture for appointment. The term for the newly-elected HAB members will begin November 1, and the members and alternates will be seated at a HAB meeting on December 2.

Commission Showcases New Creative at Two Retail Industry Luncheons

Northern and Southern California are some of the most important markets for California avocados, thus the California Avocado Commission's presence at, and sponsorship of, The Fresh Produce and Floral Council's (FPFC) Northern and Southern California Luncheons present important opportunities. At both of these events, the Commission communicated information about the California avocado season and the Commission's marketing programs while networking with key decision makers, avocado handlers and industry stakeholders.

The NorCal Luncheon took place on February 19 in Pleasanton, CA; the SoCal event occurred on March 5 in Cerritos, CA. Carolyn Becker, CAC retail marketing director, was a presenter at both events. Becker shared information concerning this year's crop size, highlighted the new California avocado consumer advertising campaign and showcased a pre-season pre-roll video. Jan DeLyser, CAC vice president marketing, served as emcee at the NorCal luncheon and had the honor of introducing all the presenters and speakers.

As a key sponsor of both luncheons, the Commission had a booth at the events wherein fresh California avocados were featured in new California avocado display bins decked with the new campaign art and recipe booklets. At the Southern California event on March 5 in Cerritos, CA., FPFC Chair Brian Cook jumped back up to the microphone after Becker's presentation to say how much he liked the new California avocado creative.

As a sponsor and attendee, the Commission was able to raise the visibility of fresh California avocados and showcase messaging that encourages retailers, wholesalers and distributors in targeted markets to transition to California avocados once critical mass is available in the marketplace.



David Cruz and Carolyn Becker visit with Brian Carter of Mollie Stone's.

Successful Early California Avocado Promotions Build Momentum for the Season

High preference for California avocados had retailers planning Big Game and heart-healthy Valentine's Day promotions as soon as the early season fruit was available. To support the retailers willing to switch to California, the California Avocado Commission (CAC) partnered to support them on in-store, digital and social media promotions during these key retail periods.

The Commission's new display bins featuring "The best avocados have California in them" campaign creative were used in both Mollie Stone's Northern California and Gelson's Southern California retail locations from January 26 – February 21. Both chains also conducted sales contests to motivate stores to increase California avocado display sizes and use CAC's point-of-sale materials to drive awareness of the start of the California avocado season. In addition, CAC's social media team featured Facebook and Twitter posts about the events and highlighted the fruit's availability at these retail locations.

Early season promotions with targeted retailers helped spur retail sales at premium prices early in the year and drive momentum heading into the season. Mollie Stone's reported a 25 percent lift in sales in comparison to the same time period last year during its sales contests. Retailers monitor what their competition is doing, and results like these can create interest of larger chains as they consider avocado sourcing options heading into the height of California avocado season.



Display bins in this Mollie Stone's location showcase the new "The best avocados have California in them" creative.

FDA Nutrition Facts Label Updates

The Hass Avocado Board (HAB) has compiled a summary document of changes to the U.S. Food and Drug Administration's (FDA) final rules for the Nutritional Facts Label that are relevant to California avocado handler and other industry stakeholders. These changes are due to take place in early 2020.

HAB notes that "there have been no changes to the labeling requirements, but only adjustments to the size of organizations that have to comply with the FDA rules." Following is some of the USDA-approved information from HAB's summary document.

- Manufacturers with more than \$10 million in food sales must be compliant by January 1, 2020 and those with less than \$10 million in sales must be compliant by January 1, 2021
- Use of the Nutrition Facts label is voluntary as long as the avocados (whether a single fruit, or in a bag, box or container) do not bear nutrition claims
- Nutrition claims include (but are not limited to):
 - Heart-healthy
 - Good source of fiber
 - Lower in saturated fat
 - Cholesterol free
 - Good source of folate
- Any heart-healthy claim or symbol of the health claim used at point-of-purchase must include the complete FDA-approved health claim statement
- If nutrition claims are made at point-of-purchase, Nutrition Facts labels need to be fixed to the fruit or on shelf labels, signs, posters, brochures, notebooks, leaflets, etc. that are in close proximity to the fruit

A copy of the [HAB summary document](#) can be found in the right-hand navigation. The HAB document also contains copies of the Nutrition Facts Label for avocados.

A full copy of the final rules is available [online](#). If you have questions regarding the guidelines, the FDA encourages you to contact them directly for clarity and to ensure compliance.

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 – March 11, 2020

	Conventional #1	Organic #1
California Hass	(Field Price Per Lb)	(Field Price Per Lb)
#32's	\$1.62 - \$1.68	\$1.72 - \$1.82
36's	\$1.62 - \$1.68	\$1.72 - \$1.82
40's	\$1.62 - \$1.70	\$1.72 - \$1.92
48's	\$1.62 - \$1.70	\$1.94 - \$2.02
60's	\$1.22 - \$1.32	\$1.60 - \$1.68
70's	\$0.74 - \$0.86	\$1.36 - \$1.50
84's	\$0.40 - \$0.52	\$0.72 - \$1.00

*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 3/08/2020	Season-to-Date (since 11/01/2019)	2020 Year to Date
Hass	6,870,976	37,812,208	37,785,966
Lamb	0	0	0
Other (Greens)	24,536	913,389	783,104
California Total	6,895,512	38,725,597	38,569,070
Florida	169,840	9,807,538	2,309,780
Chile	0	2,525,666	445,506
Mexico	38,869,284	900,009,042	489,524,208
Peru	0	0	0
Other (Imports)	1,270,000	20,090,000	11,650,000
Import Total	40,139,284	922,624,708	501,619,714
USA Total	47,204,636	971,157,843	542,498,564

Sources:

California = CAC (AMRIC)

Florida = Florida Avocado Admin Committee

Chile = Comite de Paltas, Chile

Mexico = APEAM

Peru = ProHass

Other Imports = USDAAMS website

Crop Statistics

To help California avocado growers make informed harvesting decisions, below is the California Crop Weekly Harvest Projection for the first and second quarters of 2020. As shown in the chart below, as of W/E 3/8/20 over 41 million pounds has been harvested with another 4 million pounds harvested last week (W/E 3/15/20) bringing the season-to-date total to approximately 45 million pounds. While we are currently running about two weeks ahead of schedule on the harvest, another week of welcomed rains in California's growing regions should keep harvest for the current week below projections. At this time the Commission is not concerned that the current increase in harvest rates will have a detrimental impact to the overall timing of the season, however, will continue to monitor closely, as more small-sized fruit harvested early could affect total volume. In addition, fruit from other origins has been arriving at more normal levels, which has led to increased inventory levels and reduced market volatility. With the California season now underway, the Commission

recommends that growers communicate with their handlers and grove managers on a regular basis to plan their harvest strategy to ensure orderly supply to market, minimizing market volatility.

2020 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)	2020 Crop Estimate	Dec 2019 Update	AMRIC Harvest	AMRIC Shipments
Jan 5 - (10)	83,551	66,800	38,337	52,577
Jan 12 - (11)	563,245	444,600	481,651	50,464
Jan 19 - (12)	849,841	678,700	1,781,044	370,050
Jan 26 - (13)	2,035,214	1,590,000	3,077,607	1,251,352
Feb 2 - (14)	2,396,386	1,863,100	2,989,183	1,792,132
Feb 9- (15)	2,438,378	1,923,400	2,586,327	2,584,285
Feb 16 - (16)	2,254,233	1,778,600	5,428,615	4,859,289
Feb 23 - (17)	3,054,890	2,409,300	6,685,333	4,315,399
Mar 1 - (18)	4,774,531	3,764,900	10,120,017	7,357,643
Mar 8 - (19)	5,783,889	5,900,000	8,528,670	8,566,651
Mar 15 - (20)	6,950,880	7,092,700	-	-
Mar 22 - (21)	6,591,990	6,725,900	-	-
Mar 29 - (22)	9,193,258	9,381,700	-	-
1st QTR SubTotal	46,970,288	43,619,700	41,716,784	31,199,841
Apr 5 - (23)	11,858,607	9,617,600	-	-
Apr 12 - (24)	14,345,012	11,650,800	-	-
Apr 19 - (25)	14,791,298	12,017,000	-	-
Apr 26 - (26)	17,094,936	13,896,900	-	-
May 3 - (27)	16,903,500	13,720,100	-	-
May 10 - (28)	15,823,163	15,964,800	-	-
May 17- (29)	16,312,544	16,457,200	-	-
May 24 - (30)	17,923,706	18,084,600	-	-
May 31 - (31)	17,104,552	17,257,900	-	-
Jun 7 - (32)	15,110,018	15,795,000	-	-
Jun 14 - (33)	16,858,319	17,624,600	-	-
Jun 21 - (34)	17,754,874	18,550,600	-	-
Jun 28 - (35)	17,024,376	17,775,200	-	-
2nd QTR SubTotal	208,904,906	198,412,300	-	-
3rd QTR SubTotal	110,055,710	124,235,800	-	-
4th QTR SubTotal	3,069,096	2,732,200	-	-
Season-to-Date	24,234,159	20,419,400	41,716,784	31,199,841
% of Crop	7%	6%	11%	8%
Crop Size	369,000,000	369,000,000	Left to Harvest	Left to Ship
Crop Variance	17,482,625	21,297,384	327,283,216	337,800,159

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

(March 13 – April 6)

Summary- The long term *El Niño*-Southern Oscillation weakens, and we are seeing the beginning markers for a developing *La Niña*, with colder equatorial waters along the equator at 100W to 140W.

The MJO went through an activity minimum and is set to increase, and reach a maximum about March 15-20 for California and the west coast of the US.

There is support for troughing again north of Hawaii in the tropics and subtropics 20N to about 35N.

Ridging high pressure is most active into N California and Oregon from the west. This favors the anomalously dry conditions in N California and southern Oregon.

The longwave trough is continuing in the interior W US.

Subtropical trough will be extending westward along 30-35N intermittently from S California.

In the Near Term – March 14-28... Salinas Valley-San Luis Obispo Co...Significant rains focus into S California, San Luis Obispo Co and south. No significant storms are on the horizon, mainly just fronts that carry a bunch of scattered light showers. In general, wet periods occur from March 15-17th, freezes and some possible hard freezes on the 18-19th, rains from the 20-22nd. Another rain occurs for N California on 24-25th and move south into the central coast area on its way to SOCAL, and produce snow in the Sierras.

In the southern California avocado growing areas, from San Luis Obispo to San Diego County, the period from March 14-28th will have showery periods, some seasonable rain amounts, and even some above normal rainfall, especially Santa Barbara Co to Los Angeles Co. Frequent frontal passages are indicated. Heaviest rains appear to be on the 12th, 16th, then a cold system and thunderstorms about the 18-19th and again about 25-27th. Some frosts are possible as the airmass dries out briefly between rains on 15th, and 19-20th.

Summary – March 28 – April 30... The general synopsis for Southern California is that showers are possible on April 1-5. The clear periods between fronts with showers bring risk of light frost in the coldest valleys. The first half of April also has a few cold mornings during the first week, between a few light shower events. Drier and warmer during April 15-20, with more coastal fog and low clouds at the coast and coastal valleys, and warmer nights.

Seasonal Outlook May 1-31... Northern and Central California overall pattern....A little above normal rainfall from showers and thunderstorms in the early to mid-month period. Temperatures near normal. For central California (Sierras and central coastal valleys) near normal rainfall. Temperatures near normal in April, but rapidly turning hot in early May as high pressure builds early in the season this year.

Southern California: San Luis Obispo Co to San Diego Co...Our latest guidance is suggesting that May 1-15 will be warmer and drier than normal. Watch for May, as a whole, to be sunnier and warmer than normal, possibly with some early hot days in coastal hills as well as inland valleys and deserts.

Alan Fox...Fox Weather, LLC

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