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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 Web/Teleconference Board Meeting

November 19

November 19

Time: 10:00am – 1:00pm

Location: Web/Teleconference

2020 California Avocado Acreage and Condition Report Available

To ensure the California Avocado Commission can make informed marketing and budgeting decisions, it has partnered with LandIQ to conduct statewide spatial land use surveys via digital satellite imagery, aerial photography and analytical tools. This data is compiled in a comprehensive land use database and an annual summary is prepared. The [2020 Statewide Avocado Acreage and Conditional Analysis is now available online](#).

Highlights from this year's survey are as follows:

- Planted avocado acreage in the state totaled 54,017
- The planted avocado acreage for avocado growing counties is as follows:
 - Riverside — 5,046
 - Santa Barbara — 6,741
 - San Diego — 16,488
 - San Luis Obispo — 4,043
 - Ventura — 19,754

- Minor county total (Fresno, Kern, Los Angeles, Monterey, Orange, San Bernardino, Tulare) — 1,945
- As concerns the growing regions, their acreage is divided as follows:

2020 Avocado Acreage Classification Summary				
County	Producing Acres	New/Young Acres	Topped/Stumped Acres	Planted Acres
San Diego	14,421	783	1,284	16,488
Riverside	4,335	446	264	5,046
Ventura	17,056	1,825	874	19,754
Santa Barbara	5,828	629	284	6,741
San Luis Obispo	3,894	82	67	4,043
Five County Total	45,534	3,766	2,772	52,072
<i>Minor Counties</i>				
<i>Orange</i>	<i>990</i>	<i>91</i>	<i>11</i>	<i>1,092</i>
<i>San Bernardino</i>	<i>467</i>	<i>22</i>	<i>3</i>	<i>492</i>
<i>Monterey</i>	<i>222</i>	<i>0</i>	<i>7</i>	<i>230</i>
<i>Tulare</i>	<i>104</i>	<i>2</i>	<i>1</i>	<i>106</i>
<i>Los Angeles</i>	<i>14</i>	<i>3</i>	<i>0</i>	<i>17</i>
<i>Fresno</i>	<i>1</i>	<i>3</i>	<i>0</i>	<i>4</i>
<i>Kern</i>	<i>3</i>	<i>0</i>	<i>0</i>	<i>3</i>
Minor Counties Total	1,800	121	23	1,945
GRAND TOTAL	47,334	3,887	2,795	54,017

- The age of planted acreage breaks down as follows:
 - Planting to 4 years — 4,417 acres (8%)
 - 5 – 8 years — 9,289 acres (17%)
 - 9 – 15 years — 7,717 acres (14%)
 - 16 – 20 years — 8,989 acres (17%)
 - 21 years + — 23,604 acres (44%)

The report also has tables detailing acreage by zip code, new acres by county and planting year, a breakdown of avocado acreage by planting density (high density versus standard), the net change in producing/young/stumped acreage by county, and various maps noting the acreages of avocados planted.

Recording of California Avocado Society Annual Meeting Available Online

On October 21, the California Avocado Society hosted its 105th Annual Meeting virtually where industry experts discussed a range of topics of interest to the California avocado industry. A [recording of the CAS meeting](#) is now available online. Presentations included the following:

- Dr. Gary Bender — High density planting
- Lance Andersen — Evapotranspiration
- John Burr — Pulse irrigation
- Jim Davis — Avocado lace bug

CAS President Leo McGuire and Board Director Ben Faber also spoke at the event.

Online Nitrogen Management Course Available

The University of California is offering a seven-part online [Nitrogen Management course](#). The curriculum addresses the objectives of the American Society of Agronomy and the [video sessions](#) will cover:

- Environmental impacts of nitrogen loss
- Nitrogen cycling soil transformations
- Nitrogen cycling plant utilization
- Nitrogen sources
- Nitrogen budgeting
- Irrigation and nitrogen management
- California cropping systems

Four discussion sessions will be held in January 2021. The discussions will cover nutrient management and soil and water management.

The fee for the course is \$120 for non-students and \$60 for students. Interested parties can join the course at any time until December 31, 2020. [Online registration for the nitrogen management course](#) is available.

For more information, contact Sat Darshan Khalsa at sdskhalsa@ucdavis.edu or 707.205.7007.

Spanish Version of Hass Avocado Board Quality Manual Available

The Hass Avocado Board has launched a [Spanish version of its Avocado Quality Manual: A Guide to Best Practices online](#). The manual is available on HAB's [avocado quality webpage](#), which is designed to make it easy for industry stakeholders to access this critical information.

Users can download a complete PDF version of the Avocado Quality Manual or download PDFs of specific sections of the manual that pertain to their interests (in both English and Spanish). The manual has individual chapters focused on best practices for:

- Packing houses within California ([English](#)) ([Spanish](#))
- Packing houses outside California ([English](#)) ([Spanish](#))
- The transport sector ([English](#)) ([Spanish](#))
- Distribution centers ([English](#)) ([Spanish](#))
- Re-packers and fruit ripeners ([English](#)) ([Spanish](#))
- The retail sales sector ([English](#)) ([Spanish](#))
- Identifying common internal and external fruit defects ([English](#)) ([Spanish](#))

CAC's Social Campaigns and Merchandise Shop Keep California Avocados Top-of-mind Year-round

In a year like 2020, when trips to the grocery store were fewer and far between due to the pandemic, keeping California avocados top of mind was imperative to drive purchases and a premium price. In order to keep targeted consumers

engaged with the brand, the California Avocado Commission provided consumers with compelling content that would encourage them to look for California avocados in season. CAC also implemented nimble social media strategies that could easily be adjusted to cultural sensitivities and concerns during turbulent times. In addition, the Commission launched a California avocado merchandise shop to bring the fruit to the forefront of cultural conversations and allow consumers to directly showcase their love of California avocados throughout the year.

From May through November, the Commission pivoted its social media strategy as needed to ensure California avocados' premium image was maintained during a year filled with social unrest and a surging global pandemic. As COVID-19 hit the United States, the Commission quickly transitioned its social communications to address the health concerns surrounding the crisis by focusing on posts that shared food handling and storage safety tips, including how to wash, handle and freeze California avocados. CAC quickly updated the consumer website with content making it clear California avocado growers and distributors were following safety precautions. As COVID progressed across the U.S. and increasing numbers of Americans began spending more time in their kitchens, the Commission expanded its rollout of helpful how-to content demonstrating safe handling and preparation techniques. To broaden its reach, the Commission shared how-to video content on Pinterest for the first time.

Mindful that millions of Americans were living in locked-down environments, the Commission increased its efforts to share recipe ideas with consumers on social channels. The recipes demonstrated the fruit's versatility while inspiring consumers to try new things in their kitchen.

During times of cultural unrest, and crises like the devastating wildfires in the west, the Commission monitored social media conversations closely and modified social content to ensure the brand proceeded with sensitivity. When platform sentiment became negative on Twitter and Facebook, the Commission moved away from those volatile channels and focused its attention on platforms like Pinterest, which were more attuned to the California Avocados brand.

CAC's social campaigns also brought to life the playful "The best avocados have California in them" campaign with creative videos, GIFs, GIPHY stickers and static images shared across social channels. Across the board, these posts received positive feedback on Facebook, YouTube, Instagram, Pinterest and Twitter driving brand affinity and excitement for the 2020 California avocado season. On GIPHY, California avocado stickers were viewed more than 250,000 times.

To expand California avocados' presence in consumers' lives throughout the year, the Commission launched its online California avocado merchandise shop. The shop gives consumers the opportunity to showcase their love of California avocados with a curated selection of beach gear, clothing, stickers, socks and more. And when consumers show off their California avocado gear, they create a word-of-mouth ripple effect that ensures the Golden State fruit remains part of the cultural conversation all year long.

The California avocado merchandise shop has not yet officially launched on all of CAC's social channels, but it has been promoted on Pinterest to capture the attention of "Premium Californians", a key consumer target for the Commission's. Thus far, the Pinterest posts have garnered 619,000 impressions. The new merchandise site was shared in a California avocado e-newsletter, which has nearly 200,000 subscribers. That particular email received an average open rate of 36%, exceeding industry benchmarks.

This season CAC's social content on Facebook, Instagram and Twitter has yielded more than 3 million unpaid impressions and more than 11.2 million paid impressions. On YouTube, CAC videos have garnered more than 12 million views (both paid and unpaid). And the Pinterest pins featuring how-to content, new California avocado merchandise and recipes gathered more than 12.7 million impressions. By adapting its social media strategies to changing cultural sensitivities and launching an online merchandise shop, the Commission has successfully promoted the fruit's premium quality and versatility, while driving affinity for the brand during a most challenging year.



Playful visuals and compelling storytelling captured viewers' attention on YouTube.

Commission Connects with Global Audience at First-ever Virtual PMA Fresh Summit Event

Due to COVID-19, for the first time in seven decades the Produce Marketing Association Fresh Summit was held virtually, welcoming retailers, dietitians, foodservice distributors and operators, handlers, educators, students and trade press from across the globe to three days of live online presentations, workshops, networking sessions and virtual receptions. Because PMA Fresh Summit is a respected global industry event with 70 years of history, attendees from 64 countries flocked to the virtual event, which played host to 31 speakers, showcased more than 21 hours of educational content and drew more than 360 exhibitors. Nearly 2,000 live viewers joined PMA's CEO Cathy Burns for her State of the Industry presentation and more than 61,000 views were garnered by "Marketplace" exhibitor videos.

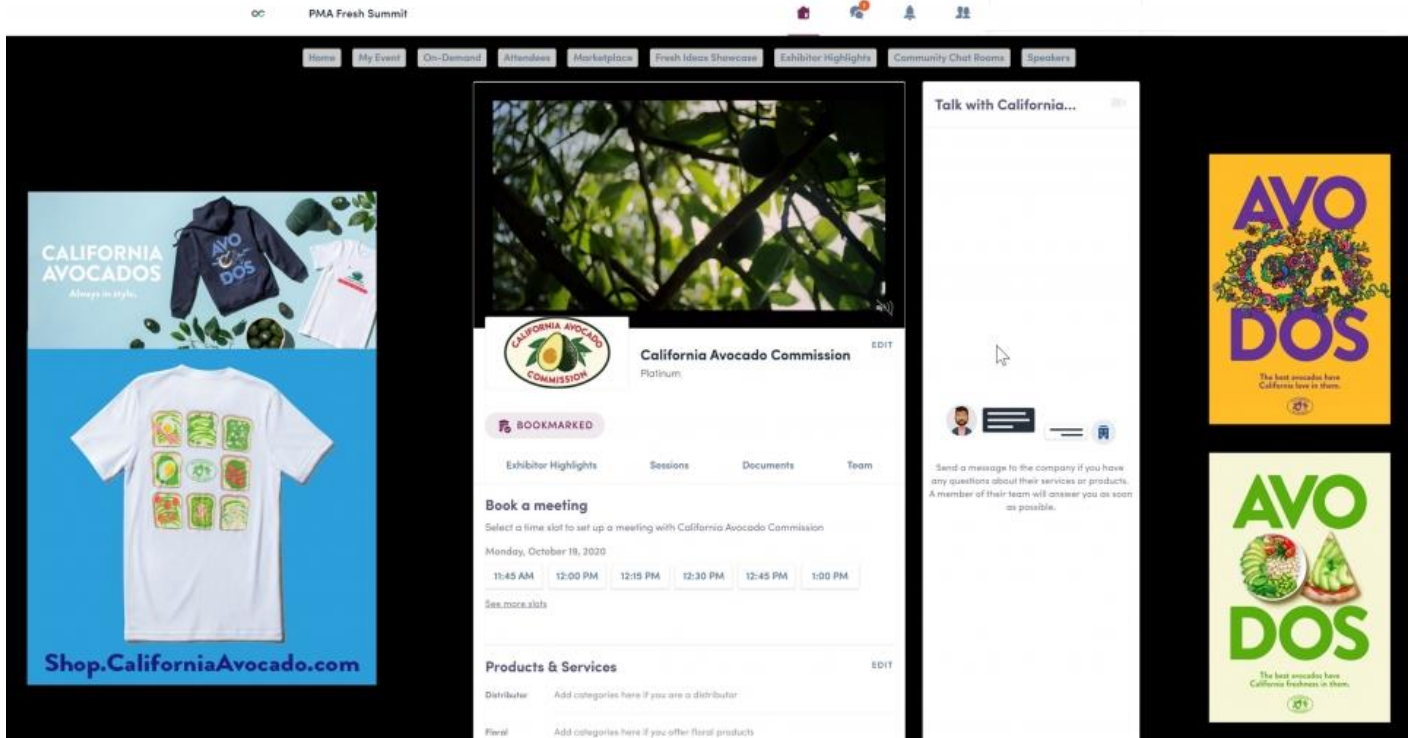
The California Avocado Commission (CAC) decided to participate and sponsor the virtual summit for several reasons. By attending this year, CAC was able to maintain the high level of PMA-assigned points it has earned through its support of the event during the past 40 years. These points will ensure the Commission will continue to secure high-traffic locations for its Fresh Summit show booths, prime hotel blocks and other benefits in forthcoming years. The PMA Fresh Summit also provided the Commission with a key opportunity to maintain a strong presence in front of retail buyers and other industry members and demonstrated CAC's continued support for PMA and the industry at large. The Commission's participation in the event was promoted via a trade press release, LinkedIn posts and personal outreach.

This year, CAC Director of Trade Affairs Angela Fraser served as co-chair of Fresh Summit. As co-chair, Angela greeted attendees prior to multiple sessions and also sang for one of the virtual receptions. One of the receptions featured the singer Sting and other entertainers; another featured DJ Questlove. During the various receptions, industry members used the chat feature on the platform to engage with one another. More than 40,000 messages were exchanged during the summit, which began with preview days for buyers on September 28. Attendees were able to preview the virtual Fresh Summit "marketplace" as early as October 7, and the key expo dates took place October 13 – 15. The event platform will remain live through November 13.

The Commission was a platinum sponsor of the event, so California avocados were featured during the Wednesday morning General Sessions with the showing of a California avocado-branded video. California avocados also received prominent listing on PMA advertising leading up to the event and premium advertising positioning.

The Fresh Summit online platform allowed attendees to request and hold virtual meetings. During the event the CAC team hosted 13 virtual meetings with select customers, trade media and potential marketing partners. The Commission also secured 821 views of its profile and 661 views of its Sponsored Product Demo video, including views by representatives from Costco, Gelson’s, Hannaford, Lund’s, PF Chang’s China Bistro, Sysco, Topco, Tops and Walmart.

Jan DeLyser, CAC vice president marketing, provided updates about the current California avocado season and an early look at next season during a Zoom-based presentation. Carolyn Becker and Dave Anderson, CAC retail marketing directors, also hosted a presentation entitled, “Evolving Opportunities with Avocado Promotions.”



Visitors to the California Avocado Commission Marketplace viewed advertising and merchandise examples, downloaded helpful documents, watched videos and booked meetings with the Commission team.

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 – November 10, 2020

	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 11/08/2020	Season-to-Date (since 11/01/2020)	2020 Year to Date
Hass	1,684,018	1,684,018	360,293,323
Lamb	0	0	11,169,186
Other (Greens)	0	0	1,599,420
California Total	1,684,018	1,684,018	373,061,929
Florida	563,860	563,860	29,010,245
Chile	0	0	2,445,132
Mexico	41,147,621	41,147,621	1,852,629,494
Peru	0	0	184,299,619
Other (Imports)	1,540,000	1,540,000	41,330,000
Import Total	42,687,621	42,687,621	2,080,704,245
USA Total	44,935,499	44,935,499	2,482,776,419

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 through week ending 11/08/2020, where year-to-date harvest volumes total over 377 million pounds. It is estimated that over a million pounds were harvested for week ending 11/15/20, bringing the total 2020 crop harvested to date near 379 million pounds. It is anticipated that the final 2020 harvest will wrap up over the next few weeks, with the final crop number just north of 380 million pounds. As the 2020 season comes to an end, CAC is working with handlers on the official pre-season 2021 crop estimate, with total volume estimates and weekly projections available by mid-December.

**2020 California Crop Weekly Harvest Projection
Weekly Crop Movement vs. Distribution Projections
All Varieties**

Week Ending (CAC Week)	4-Year Historical Forecast	AMRIC Handler Forecast	Industry Adjusted		
	2020 Crop Estimate	July 2020 Update	AMRIC Harvest	AMRIC Shipments	Crop Size Indicator
1st QTR SubTotal	46,970,300	62,797,900	62,632,891	52,385,402	
2nd QTR SubTotal	208,904,900	180,168,200	183,472,758	181,250,607	
Jul 5 - (36)	17,578,200	14,163,600	12,177,567	11,574,500	374,673,325
Jul 12 - (37)	16,410,700	13,601,000	11,798,416	13,322,977	372,105,745
Jul 19 - (38)	15,887,500	10,485,100	10,492,982	15,018,629	372,149,541
Jul 26 - (39)	12,604,900	9,917,300	9,778,341	12,642,478	372,000,478
Aug 2 - (40)	10,048,300	9,504,100	9,606,655	9,872,224	372,159,315
Aug 9 - (41)	8,464,600	9,925,700	9,865,726	9,555,162	372,114,152
Aug 16 - (42)	7,533,300	9,558,200	8,963,219	9,861,463	371,447,339
Aug 23 - (43)	6,154,000	9,476,700	8,183,969	10,729,539	370,029,021
Aug 30 - (44)	5,176,500	8,960,900	8,756,953	9,712,553	369,882,962
Sep 6 - (45)	3,233,000	7,779,100	8,747,545	9,530,575	370,995,973
Sep 13 - (46)	2,491,000	6,776,200	6,209,499	6,981,700	370,435,815
Sep 20 - (47)	2,436,000	6,790,200	6,997,493	8,015,120	370,699,028
Sep 27 - (48)	2,037,600	5,674,000	6,137,477	7,900,578	371,207,626
Oct 4 - (49)	1,089,700	3,120,200	4,090,383	7,916,642	372,204,297
Oct 11 - (50)	640,000	1,864,400	2,504,002	6,233,898	372,852,109
Oct 18 - (51)	270,900	845,300	2,269,906	4,871,928	374,283,157
Oct 25 - (52)	266,400	831,300	2,033,879	2,756,603	375,485,328
Nov 1 - (1)	155,900	479,700	1,353,970	1,670,428	376,842,065
Nov 8 - (2)	7,700	8,900	1,684,018	2,792,568	378,033,319
Nov 15 - (3)	3,800	4,500	-	-	
Nov 22 - (4)	40,600	47,800	-	-	
Nov 29 - (5)	24,100	28,400	-	-	
Dec 6 - (6)	23,600	1,600	-	-	
Dec 13 - (7)	52,800	72,200	-	-	
Dec 20 - (8)	263,300	65,200	-	-	
Dec 27 - (9)	230,300	52,300	-	-	
2nd Half SubTotal	113,124,700	130,033,900			
Season-to-Date	368,361,400	372,728,000	377,757,648	394,595,574	
% of Crop	99%	100%	101%	106%	
Crop Size	373,000,000	373,000,000	Left to Harvest	Left to Ship	
Crop Variance	9,396,248	5,029,648	(4,757,648)	(21,595,574)	

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

(November 1-20)

Summary- A *La Niña* pattern is expected to persist through the winter. For California this argues for drier than normal in the central and south portions of the state, and wetter than normal in the Pacific Northwest. Northern California coast and mountains will be somewhat in between with periods of some rain but heavier rain will likely stay in northernmost areas, including Del Norte, Humboldt Co, Trinity Co, and Siskiyou's. Occasionally, we may see some troughs develop over Arizona, S California, and NW Mexico.

In the near term, we are in a transition period, with a more likely return (finally!) of winter rains to N California. Snowfall in the central and southern Sierra will tend to be lighter and with higher snow levels than normal.

There is support for development of lows and troughs into N California and the Pacific Northwest states, as we turn toward a more normal or seasonable condition for rain in NW California. Southern half of California remains unusually dry and warm, but with cold and frosty nights still possible in the inland valleys with the dry air.

For northern California, showers occur Nov 11-15. The best chances for rains appear to be Nov 11-15, Nov 17-23, Nov 26-28th. The first half of Dec appear at current time to be unusually dry, with a more likely return of warm conditions during the dry periods in Dec. 1-3, 6-12th.

Santa Ana or offshore warm dry winds are possible again during periods between rains in mid to late Nov, and the first part of Dec, i.e. around 3-4th and 9th of Dec.

Both the CFSv2 and NMME seasonal long range prediction models suggest that December through March look very dry for all of California, but wetter than normal for Oregon and the Pacific Northwest coast. The NORCAL coast (Humboldt County north) and Cascades from Mt Lassen northward have a chance for near normal precipitation. This winter there is a better than normal chance for atmospheric rivers to develop, bringing abundant rains to the Pacific Northwest coast, and east into Idaho. By contrast, it appears persistently dry for SOCAL and the south half of California with occasional rains but still drier than normal.

There appears to be a lack of rain state-wide in Jan 2021. Feb and Mar do not look as dry as we have been seeing in the previous model solutions from NMME and CFSv2 – Mar 2021 in Northcentral through Southern California.

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

Potential Dates of Precipitation (from Fox Weather's CFSDailyAI system):

The listing of dates normally included for hot and cold spells, is a very approximate solution. What we can point out is that the latest version of the North American Multi-Model Ensemble (NMME) as well as the CFSv2 have been showing well above normal temperatures during November. This suggests that the upcoming cold snaps during 6-8th and 11-17th do not appear to be representative of the prevailing pattern over the late Nov and early to mid-Dec period. This would tend to be consistent with our IVTinit™ results for return to a mild pattern after 18 Nov.

Seasonal Outlook - The long range outlook for Dec 9, 2020 – Feb 28, 2021... A dry and warm early winter continues to be indicated, with recurrent Santa Anas for SOCAL and coastal mountains of the central coast, and in the Sierra west slope. December is a little drier than normal for NORCAL, and marginally wet for Central and Southern California. Jan, Feb and most of March look currently look very dry, and appear to turn colder than normal during most of Feb, and again during a part of March. 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 avocados/citrus areas.

In *La Niña* seasons, we usually see dry and cold conditions in central and southern California, but wetter and warmer than normal in Oregon, Washington, and NW California. This upcoming season looks extraordinarily dry, with both CFSv2 and NMME models showing below normal rainfall in Jan and Feb 2021, and most of Feb 2021.

Optimistically, the chances appear better for near or a little above normal rainfall in the wet months of Feb and Mar in northcentral and N California, including Tuolumne Co north to Mt Lassen area, the Siskiyou's, and northern California coast. With that, there is a chance for above normal snowfall in N California and the Sierras in Feb and Mar due to below or near normal temperatures concurrent with near or above normal precipitation. However, thanks to *La Niña*, it may be difficult to realize precipitation approaching normal in Southern parts of California, even if the snowfall and snow water equivalents make a good Comeback during Feb and Mar.

Alan Fox...Fox Weather, LLC

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