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2016 California Avocado Acreage Inventory Update

Each year the California Avocado Commission (CAC) conducts an inventory of California avocado acreage in order to better understand industry trends and gauge the impact of ever-increasing production pressures on California avocado growers.

The acreage survey uses remote sensing techniques, applied against aerial and satellite imagery collected in the spring, to delineate avocado acreage into producing versus non-producing acreage. Furthermore, avocado acreage is classified by categories including: producing, topped/stumped and new/young. The annual acreage inventory is conducted for California's five main growing regions: San Diego, Riverside, Ventura, Santa Barbara and San Luis Obispo counties. Other minor counties' acreage is estimated based on ancillary data from county agricultural commissioners and our grower community. CAC uses the results from the acreage survey to complete a number of industry-related projects including — but not limited to — mid-season crop estimating, grove ID database and annual crop statistic reporting.

The results of the 2016 California avocado acreage inventory have been compiled and indicate a decline from 2015 in bearing (producing + topped/stumped classification) California avocado acreage of about 1,000 acres. This decrease is not surprising when factoring in the pressures placed on growers by the prolonged drought conditions and water availability. Of the more than 50,000 bearing acres, about 44,000 are classified as producing with the remain-

ing 6,500 representing topped/stumped acreage. What is unknown at this point, is how many of those acres classified as topped/stumped have been abandoned and how many will come back into production over time.

While the year-over-year analysis shows a decline of 4,500 producing acres from 2015, overall planted California acreage (producing + topped/stumped + new/young) has increased almost 600 acres from last year, for a total of 54,400

planted acres. A deeper dive into those “lost” producing acres points to a shift in classification to topped/stumped acreage. As CAC begins the planning process for next year, projects that will help quantify the number of topped/stumped acres that may remain in the industry and the number that could be abandoned are now being considered.

One bright spot in the results is an increase from 2015 of more than 1,600 acres classified as new or young trees.

2016 California Avocado Acreage Inventory Summary by County						
County	Producing Acres	Top/Stump Acres	New/Young Acres	Planted Acres	Bearing Acres	
San Diego	15,000	2,741	561	18,302	17,741	
Riverside	4,142	916	630	5,688	5,058	
Ventura	15,724	1,380	1,382	18,486	17,104	
Santa Barbara	4,267	712	484	5,464	4,980	
San Luis Obispo	3,269	745	491	4,505	4,014	
Five County Total	42,403	6,494	3,548	52,445	48,898	
Minor Counties Total*	1,958			1,958	1,958	
Grand Total	44,361			54,403	50,856	

California Avocado Acreage Classification Comparison (2015 vs 2016)						
County	Year	Producing Acres	Top/Stump Acres	New/Young Acres	Planted Acres	Bearing Acres
San Diego	2016	15,000	2,741	561	18,302	17,741
	2015	16,870	1,474	430	18,774	18,344
	Change (+/-)	-1,869	1,266	131	-472	-603
Riverside	2016	4,142	916	630	5,688	5,058
	2015	5,056	479	354	5,890	5,536
	Change (+/-)	-914	437	276	-202	-477
Ventura	2016	15,724	1,380	1,382	18,486	17,104
	2015	16,732	598	670	18,000	17,331
	Change (+/-)	-1,008	782	713	486	-226
Santa Barbara	2016	4,267	712	484	5,464	4,980
	2015	4,819	194	327	5,340	5,013
	Change (+/-)	-551	518	157	123	-33
San Luis Obispo	2016	3,269	745	491	4,505	4,014
	2015	3,500	220	124	3,844	3,720
	Change (+/-)	-231	526	367	662	294
Five County Total	2016	42,403	6,494	3,548	52,445	48,898
	2015	46,978	2,966	1,905	51,848	49,944
	Change (+/-)	-4,574	3,529	1,643	597	-1,046

This new/young acreage — totaling 3,500 industry-wide — is comprised of trees identified as four years or younger and is indicative of growers' continued support of the California avocado

industry through investment in new plantings and grove rejuvenation.

Details of the 2016 acreage update are included with this article, while archived acreage inventory updates can

be found on the grower website at CaliforniaAvocadoGrowers.com/industry/acreage-inventory-summaries. 🍷

2016-17 Mid-Season California Avocado Crop Update

The California Avocado Commission (CAC) thanks all of the growers who participated in the recently-concluded Crop Estimate Survey. Survey forms were mailed out in April with a return date of early May. Responses represented a wide range of grove sizes and locations for more than 25,000 acres, exceeding CAC's goal of 50 percent of acreage representation and capturing a fairly accurate snapshot of the industry and the crop currently being harvested.

The mid-season crop update is compiled by applying survey responses to predefined avocado acreage by area to project an estimated total industry volume. Avocado acreage is updated through an acreage inventory survey conducted annually in the spring (see 2016 Acreage Inventory Update article on page 20). In recent years, CAC has used bearing acreage (producing + topped/stumped classification) to calculate the mid-season crop update and, on average, actual volume has been within 6 percent of the mid-season estimate.

In calculating the 2016-17 mid-season crop update, using bearing acres, the survey results yielded a crop volume nearly 30 million pounds higher than the pre-season estimate of 215 million pounds. In reviewing what had already been harvested, as well as industry stakeholder input, these results did not seem feasible. Therefore, crop survey results — specifically estimated yield per acre, by area — were thoroughly reviewed a second time and were deemed

to be plausible. With these factors in play, the crop team turned to the bearing acreage figures being utilized to form the estimate, and ran the estimate using only producing avocado acreage. The results from this analysis produced an estimated crop size of 212.3 million pounds, which supports crop and industry indicators to-date.

These survey results were presented to the CAC Board in May and there was support to move forward using producing acres and a mid-season estimate update of 212.3 million pounds. While

crop estimating can be difficult to perfect, CAC staff will continue to review, monitor and evaluate the data available to estimate the California crop to continually provide the industry with the most accurate statistics possible.

Included are details of the 2016-17 mid-season California crop update, which contain variety breakdowns and production by county. Additional details can be found on CAC's website at CaliforniaAvocadoGrowers.com/industry/crop-projections-and-estimates/2016-17-mid-season-crop-estimate. 🍷

Variety	Producing Acres	Estimated Yield		Response %
		Lbs/Acre	Lbs (MM)	
Hass	42,240	4,801	202.8	59%
Lamb-Hass	1,392	5,058	7.0	45%
Other	729	3,363	2.5	46%
Total	44,361	4,789	212.3	58%

County	Hass Only			All Varieties		
	Producing Acres	Estimated Yield		Producing Acres	Estimated Yield	
		Lbs Per Acre	Lbs (MM)		Lbs Per Acre	Lbs (MM)
San Diego	14,171	5,560	78.8	15,003	5,531	82.9
Riverside	4,074	2,711	11.0	4,142	2,718	11.2
Orange	1,198	3,847	4.7	1,250	3,748	4.7
Ventura	14,778	5,761	85.1	15,725	5,698	89.6
Santa Barbara	4,190	3,926	16.4	4,266	3,908	16.7
San Luis Obispo	3,218	2,727	8.8	3,267	2,727	8.9
Minor Counties	611	2,990	1.8	708	2,932	2.1