



# AGENDA

California Avocado Commission  
Marketing Committee Meeting

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## Meeting Information

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**Date:** March 9, 2022

**Time:** 10:00 a.m.

**Location:** Web/Teleconference

**Web/Teleconference URL:**

<https://californiaavocado.zoom.us/j/84751011157?pwd=aUh3OW9CYjZzZTBDDdFdLWlJCVkUyZz09>

**Conference Call Number:** (669) 900-6833

**Meeting ID:** 847 5101 1157

**Passcode:** 273995

**Meeting materials will be posted online at least 24 hours prior to the meeting at:**

<https://www.californiaavocadogrowers.com/commission/meeting-agendas-minutes>

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## Committee Member Attendance

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As of Tuesday, March 8, 2022, the following individuals have advised the Commission they will participate in this meeting via web/teleconference:

Gary Caloroso

Dave Fausset

Denise Junqueiro

Rachael Laenen

Patrick Lucy

Andy Lyall

Hayden McIntyre

Doug Meyer

Peter Shore

Steve Taft

Chris Varvel

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Time	Item
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10:00 a.m.	1. Call to Order a. Roll Call/Quorum
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<b>Time</b>	<b>Item</b>
10:05 a.m.	<p><b>2. Opportunity for Public Comment</b> Any person may address the Committee at this time on any subject within the jurisdiction of the California Avocado Commission.</p>
10:10 a.m.	<p><b>3. Consent Calendar</b> Consent Calendar items are expected to be routine and non-controversial, to be acted upon by the Marketing Committee at one time without discussion. If any Committee member, staff member, or interested person requests that an item be removed from the Consent Calendar, it shall be removed so that it may be acted upon separately.</p> <p>a. Consider Approval of Marketing Committee’s Web/Teleconference Meeting Minutes of December 9, 2021</p>
10:15 a.m.	<p><b>4. Discussion Items</b></p> <p>a. Chairman Caloroso’s Welcome to 2022 Marketing Committee and Introductions</p> <p>b. 2022 California Crop Forecast</p> <p>c. 2022 Import Crop Projections</p> <p>d. 2022 Media Plan and Creative Updates</p> <p>e. Consumer Public Relations and Living Well Brand Advocates Plans</p> <p>f. Retail and Foodservice Tiered-Account Updates</p> <p>g. Shop.CaliforniaAvocado.com</p> <p>h. Industry Updates</p>
12:00 p.m.	<p><b>5. Adjourn Meeting</b></p>

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## **Disclosures**

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The times listed for each agenda item are estimated and subject to change. It is possible that some of the agenda items may not be able to be discussed prior to adjournment. Consequently, those items will be rescheduled to appear on a subsequent agenda. All meetings of the California Avocado Commission are open to the public and subject to the Bagley-Keene Open Meeting Act.

All agenda items are subject to discussion and possible action. For more information, or to make a request regarding a disability-related modification or accommodation for the meeting, please contact April Aymami at 949-341-1955, California Avocado Commission, 12 Mauchly, Suite L, Irvine, CA 92618, or via email at [aaymami@avocado.org](mailto:aaymami@avocado.org). Requests for disability-related modification or accommodation for the meeting should be made at least 48 hours prior to the meeting time. For individuals with sensory disabilities, this document is available in Braille, large print, audiocassette or computer disk. This meeting schedule notice and agenda is available on the internet at <https://www.californiaavocadogrowers.com/commission/meeting-agendas-minutes> and <http://it.cdfa.ca.gov/igov/postings/detail.aspx?type=Notices>.

If you have questions on the above agenda, please contact David Cruz at [dcruz@avocado.org](mailto:dcruz@avocado.org) or 949-341-1955.

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### **Summary Definition of Conflict of Interest**

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It is each member's and alternate's responsibility to determine whether they have a conflict of interest and whether they should excuse themselves from a particular discussion or vote during a meeting. To assist you in this evaluation, the following *Summary Definition of Conflict of Interest* may be helpful.

A Commission *member or employee* has a conflict of interest in a decision of the Commission if it is reasonably foreseeable that the decision will have a material effect, financial or otherwise, on the member or employee or a member of his or her immediate family that is distinguishable from its effect on all persons subject to the Commission's jurisdiction.

No Commission member or employee shall make, or participate in making, any decision in which he or she knows or should know he or she has a conflict of interest.

No Commission member or employee shall, in any way, use his or her position to influence any decision in which he or she knows or should know he or she has a conflict of interest.

**CALIFORNIA AVOCADO COMMISSION**  
**MARKETING COMMITTEE WEB/TELECONFERENCE MEETING MINUTES**  
**December 9, 2021**

A web conference meeting of the Marketing Committee was held on Thursday, December 9, 2021, with the following people participating:

**MEMBERS PARTICIPATING**

Gary Caloroso  
Phil Henry  
Denise Junqueiro  
Rachael Laenen  
Andy Lyall  
Ed McFadden  
Doug Meyer  
Peter Shore  
Steve Taft  
Angela Tallant  
Rob Grether (Ex Officio Member)

**MEMBERS NOT PARTICIPATING**

Patrick Lucy  
Doug O'Hara  
Carson McDaniel  
Debbie Willmann

**CAC STAFF PARTICIPATING**

April Aymami  
Tom Bellamore  
Zachary Benedict  
David Cruz  
Jan DeLyser  
Angela Fraser  
Ken Melban

**OFFICIALLY PRESENT**

Bryan Reugebrink (MullenLowe)  
Candace Hollar (Mediahub)  
Tyler Kirsch (MullenLowe)  
Erica Sanchez (MullenLowe)  
Sam Schaitberger (MullenLowe)  
Temra Wald (Temra Wald Consulting)

**GUESTS PRESENT**

David Anderson (Anderson Food Sales and Marketing)  
Jennifer Ayvazian (Fusion)  
Carolyn Becker (CL Marketing)  
Will Carleton  
Michaela Dollar (MullenLowe)  
Brittany Ferrant (Mediahub)  
Kim Kurata (Kurata Communications)  
Jillian McMenamin (Golin)  
Steven Muro (Fusion)  
Jill Netzel (Fusion)  
Laura Paden (PJ/PR)  
Martin Pagh Ludvigsen (MullenLowe)  
Mollie Partesotti (MullenLowe)  
Lecia Rdzak (Fusion)  
Matt Schraut (Fusion)  
Kevin Simek (Mediahub)  
Chris Varvel (Henry Avocado)

**ITEM #1 ROLL CALL/QUORUM**

The Marketing Committee teleconference meeting was called to order at 10:02 a.m. by Chairman Gary Caloroso. A quorum was established.

**ITEM #2 OPPORTUNITY FOR PUBLIC COMMENT**

Mr. Caloroso acknowledged that this was Phil Henry's last Committee meeting and thanked him for all that he has done. Ms. DeLyser noted that he has served since the beginning of the reestablishment of the Committee and will recommend to the Chair that Chris Varvel from Henry Avocado Corporation take his place on the Committee.

**ITEM #3 CONSENT CALENDAR**

Mr. McFadden moved to approve the Consent Calendar, including minutes from the June 16, 2021 meeting. The motion was seconded by Mr. Shore and unanimously approved.

*MOTION 21-12-09-1.*

#### **ITEM #4 DISCUSSION ITEMS**

##### **2020-21 California Crop Recap – Item 4.A.**

Ms. Aymami reported that for the fiscal year 2020-21 there were 260 million pounds of California avocados harvested. She advised the Committee that CAC crop estimating is on a calendar year now and this number does not include 9.5 million pounds carryout of Hass. She reminded the Committee that estimating is not a perfect science and crop volume varies significantly from our estimates from time-to-time and CAC does a great job working with the Committee's input to adjust our marketing programs throughout the year.

##### **2021 Import Crop Performance – Item 4.B.**

Mr. Caloroso asked for an update on Jalisco based on recent reports they will be coming into the U.S. Mr. Bellamore reminded it has been a number of years since parts Mexico were approved for access to the U.S. and that state-by-state access from Mexico is slowly still happening because of required protocols. Mr. Melban noted there is no final approved plan yet but it is expected to occur and may be slow in the beginning. He said the market will adjust accordingly. Mr. Caloroso added that Jalisco's existing demand is in Canada, Japan and Europe so it is unknown how much will come into the U.S.

Ms. Aymami shared that the 2021 import update through last Sunday was nearly 2.8 billion pounds. In comparison to 3 billion pounds in 2020 and there still are four more weeks to go. These are 2021 calendar year numbers and she noted that Other Imports were other varieties than Hass which includes Greenskins from the Dominican Republic.

##### **2021-22 California Crop Forecast – Item 4C.**

Ms. Aymami reported that the 2022 California pre-season crop estimate based on AMRIC Handler reporting is 306 million pounds with 291 million Hass, 9 million Lamb Hass, 5 million GEM and 1 million Other varieties. September's crop estimate total was 301.5 million. She noted these are very preliminary but is confident in the Hass numbers. Ms. Aymami mentioned that the monthly numbers for Lamb Hass, GEM and Other varieties may shift. She said the Lamb Hass has been gaining traction in volume, that it has been underestimated the last few years and may end up higher than the estimate. GEM finished at 2.5 million this year and will probably end up between 4-5 million.

The monthly projected numbers were based on the Handler survey, showing some fruit in February, kicking off in March, running through August and then winding down in September. CAC will revisit the crop numbers in February and discuss with the Committee afterwards.

##### **2022 Import Crop Projections – Item 4.D.**

Committee members agreed that numbers from Mexico were appearing slightly lower than last year. Mr. Meyer noted that through November sizing was down and heavier to 60's and smaller but that was starting to shift to larger fruit in December. There was agreement that this is encouraging for California. It was also noted that the Big Game is later in 2023 (February 13) and in Los Angeles.

No one on the committee had numbers from Chile yet. There was reference to port delays having stymied any momentum and Chile may not be much of a factor moving forward. The committee agreed that it is too early for any discussion about Peru volume and timing, they will circle back in February.

Ms. Junqueiro noted that it may still be a few years out before significant volume comes from Colombia. Ms. Tallant agreed and cited reasons such as infrastructure and growers still needing to get certified. There was consensus that Colombia would likely be similar volume to last year.

California Avocado Tracking Study – Item 4.E.

Ms. Wald presented summary results from the 2021 California Avocado Tracking Study, focusing on observations from the California market and highlighting key results from western states and the total United States. Awareness continues to be strong for California and California Avocados are seen as most premium, best tasting, freshest, safest, worth paying more for and the preferred region.

2021 Media Results and Learnings – Item 4.F.

Ms. Hollar presented an overview of the 2021 media results and shared preliminary plans for 2022, noting CAC will continue with outdoor, audio, digital, social and retail media. Ms. Sanchez from MullenLowe highlighted how advertising creative from the campaign “the best avocados have California in them” is being updated for the season.

Shop.CaliforniaAvocado.com Updates – Item 4.G.

Ms. Schaitberger presented observations from last year and the strategic approach planned for the Commission’s merchandise shop this year. Mr. Kirsch shared new merchandise launched in November and early December. In the packet was the Merchandise Shop update through October for everyone’s review. The marketing team will discuss benchmarks for this year and start reporting on actual sales and performance.

2020-21 Year-End Dashboard – Item 4.H.

Ms. DeLyser noted that the Dashboard report was included in the meeting packet for everyone’s review and to let her know if they had any questions.


Industry Updates – Item 4.I.

Mr. Melban noted that the California Avocado Grower Profitability Study was completed and is posted on CaliforniaAvocadoGrowers.com.

**ADJOURN**

Mr. Caloroso adjourned the web/teleconference meeting at 12:01 p.m.

Submitted by:

  
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Jan DeLyser, CAC Staff



**CALIFORNIA AVOCADO COMMISSION**

**AB 2720 Roll Call Vote Tally Summary**

To be attached to the Meeting Minutes

<b>Meeting Name:</b> <i>Marketing Committee Meeting</i>	<b>Meeting Location:</b> <i>Zoom Web/Teleconference</i>	<b>Meeting Date:</b> <i>December 9, 2021</i>
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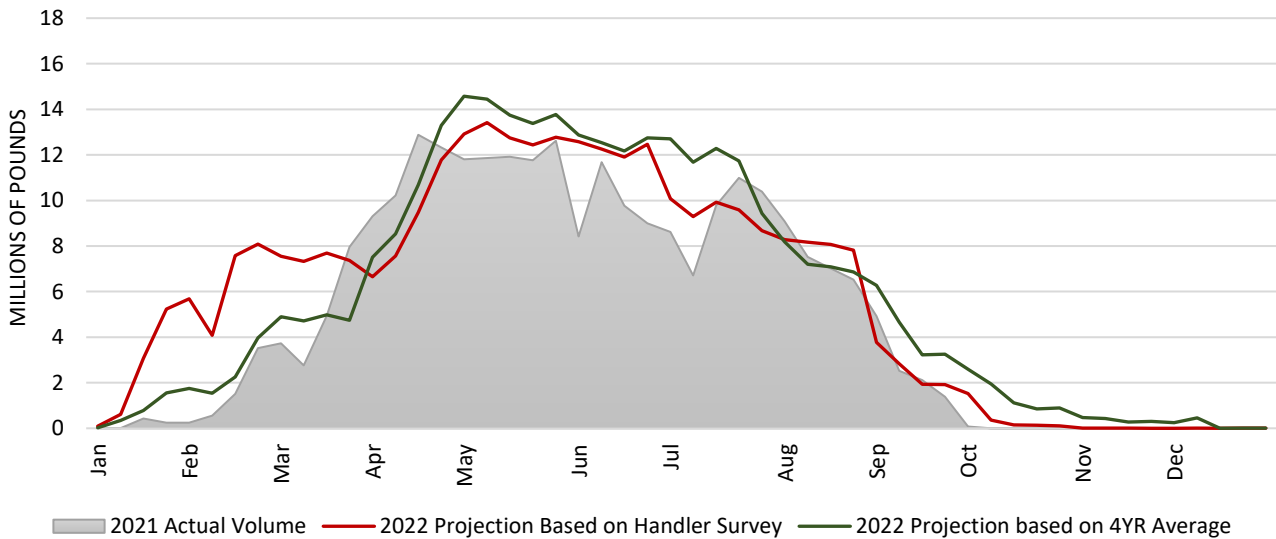
<b>Attendees Who Voted</b>	<b><u>MOTION</u> <u>21-12-9-1</u></b>
Gary Caloroso	Yea
Phil Henry	Not Present
Denise Junqueiro	Yea
Rachael Laenen	Yea
Andy Lyall	Yea
Ed McFadden	Yea
Doug Meyer	Yea
Peter Shore	Yea
Steve Taft	Yea
Angela Tallant	Yea
<b><i>Outcome</i></b>	<b>Unanimous</b>



## 2022 EARLY-SEASON CALIFORNIA AVOCADO CROP UPDATE FEBRUARY 2022

2022 Preliminary California Crop Harvest Projection						Feb 2022 Handler Survey Hass Distribution
Month	Hass	Lamb	Gem	Other	Total	
Jan	9,171,200	-	-	178,700	9,349,900	0.5%
Feb	25,800,000	-	-	156,200	25,956,200	9.0%
Mar	29,718,500	-	66,500	51,000	29,836,000	10.2%
Apr	46,381,700	1,000	1,758,700	55,400	48,196,800	16.5%
May	49,288,200	15,400	1,897,400	25,800	51,226,800	17.5%
Jun	47,580,500	220,200	1,054,100	215,800	49,070,600	16.9%
Jul	41,276,600	4,766,400	181,600	159,100	46,383,700	14.8%
Aug	30,453,700	2,649,200	37,300	55,100	33,195,300	10.6%
Sep	10,777,500	1,154,200	4,400	56,200	11,992,300	3.7%
Oct	552,100	192,000	-	9,800	753,900	0.2%
Nov	-	1,600	-	7,100	8,700	0.0%
Dec	-	-	-	29,800	29,800	0.0%
<b>Total</b>	<b>291,000,000</b>	<b>9,000,000</b>	<b>5,000,000</b>	<b>1,000,000</b>	<b>306,000,000</b>	<b>100%</b>

**California Avocado Commission**  
**2022 Weekly Harvest Projection vs. Prior Year Actual Harvest**  
**based on 306 MM pound crop size**  
**(All California Varieties)**





**California Avocado Commission**  
2022 Harvest Distribution Projection by Week

<b>Week Ending</b>	<b>Hass</b>	<b>Lamb</b>	<b>GEM</b>	<b>Other</b>	<b>Total</b>
9-Jan	93,645	-	-	4,200	97,845
16-Jan	561,610	-	-	52,400	614,010
23-Jan	2,995,383	-	-	71,200	3,066,583
30-Jan	5,184,868	-	-	50,900	5,235,768
6-Feb	5,577,043	-	-	100,800	5,677,843
13-Feb	4,051,727	-	-	25,700	4,077,427
20-Feb	7,567,540	-	-	5,400	7,572,940
27-Feb	8,065,784	-	-	24,300	8,090,084
6-Mar	7,532,900	-	1,000	17,500	7,551,400
13-Mar	7,314,900	-	-	10,600	7,325,500
20-Mar	7,632,200	-	47,900	15,500	7,695,600
27-Mar	7,338,500	-	17,600	7,400	7,363,500
3-Apr	6,560,600	-	83,000	6,600	6,650,200
10-Apr	7,343,300	-	199,800	14,500	7,557,600
17-Apr	9,035,300	-	433,900	4,800	9,474,000
24-Apr	11,306,300	-	452,800	13,300	11,772,400
1-May	12,311,200	1,000	589,200	16,200	12,917,600
8-May	12,870,900	5,800	519,800	18,000	13,414,500
15-May	12,308,400	-	433,300	6,400	12,748,100
22-May	11,859,200	400	572,300	-	12,431,900
29-May	12,389,700	9,200	372,000	1,400	12,772,300
5-Jun	12,226,900	3,600	325,000	26,300	12,581,800
12-Jun	11,753,900	36,400	383,500	86,700	12,260,500
19-Jun	11,700,000	41,300	99,800	56,200	11,897,300
26-Jun	12,039,700	138,900	245,800	46,600	12,471,000
3-Jul	9,596,500	346,600	95,000	46,000	10,084,100
10-Jul	8,752,800	488,300	29,500	24,100	9,294,700
17-Jul	8,675,300	1,225,300	-	16,700	9,917,300
24-Jul	7,901,700	1,588,300	57,100	45,200	9,592,300
31-Jul	7,525,400	1,117,900	-	27,100	8,670,400
7-Aug	7,394,500	855,300	20,800	12,100	8,282,700
14-Aug	7,448,500	712,200	-	12,000	8,172,700
21-Aug	7,448,200	612,300	1,000	1,700	8,063,200
28-Aug	7,302,500	469,400	15,500	29,300	7,816,700
4-Sep	3,372,500	398,900	2,300	2,100	3,775,800
11-Sep	2,457,200	364,600	-	9,500	2,831,300
18-Sep	1,723,200	187,500	-	26,600	1,937,300
25-Sep	1,795,100	111,600	2,100	13,400	1,922,200
2-Oct	1,433,000	91,600	-	4,600	1,529,200
9-Oct	214,900	147,900	-	2,800	365,600
16-Oct	131,700	9,300	-	7,000	148,000
23-Oct	98,000	34,800	-	-	132,800
30-Oct	107,500	-	-	-	107,500
6-Nov	-	1,600	-	2,000	3,600
13-Nov	-	-	-	2,000	2,000
20-Nov	-	-	-	3,100	3,100
27-Nov	-	-	-	-	-
4-Dec	-	-	-	-	-
11-Dec	-	-	-	12,800	12,800
18-Dec	-	-	-	-	-
25-Dec	-	-	-	6,900	6,900
31-Dec	-	-	-	10,100	10,100
<b>Total</b>	<b>291,000,000</b>	<b>9,000,000</b>	<b>5,000,000</b>	<b>1,000,000</b>	<b>306,000,000</b>

Hass=Results of February 2022 AMRIC Handler survey \* Lamb=4-year average distribution \* Gem and Other=3-year average distribution

2022 California Crop Weekly Harvest Projection		
4-Year Historical vs. AMRIC Handler Forecast		
All Varieties		
Week Ending	4-Year Historical Forecast	AMRIC Handler Forecast Feb 2022 Update
9-Jan	22,900	97,845
16-Jan	338,800	614,010
23-Jan	773,600	3,066,583
30-Jan	1,551,000	5,235,768
6-Feb	1,751,200	5,677,843
13-Feb	1,541,700	4,077,427
20-Feb	2,249,100	7,572,940
27-Feb	3,968,300	8,090,084
6-Mar	4,892,500	7,551,400
13-Mar	4,717,800	7,325,500
20-Mar	4,975,800	7,695,600
27-Mar	4,747,400	7,363,500
3-Apr	7,514,200	6,650,200
10-Apr	8,529,300	7,557,600
17-Apr	10,678,900	9,474,000
24-Apr	13,290,000	11,772,400
1-May	14,573,700	12,917,600
8-May	14,451,900	13,414,500
15-May	13,738,400	12,748,100
22-May	13,384,700	12,431,900
29-May	13,769,400	12,772,300
5-Jun	12,866,500	12,581,800
12-Jun	12,533,100	12,260,500
19-Jun	12,168,300	11,897,300
26-Jun	12,750,900	12,471,000
3-Jul	12,704,000	10,084,100
10-Jul	11,680,300	9,294,700
17-Jul	12,281,400	9,917,300
24-Jul	11,741,600	9,592,300
31-Jul	9,437,500	8,670,400
7-Aug	8,186,300	8,282,700
14-Aug	7,196,400	8,172,700
21-Aug	7,087,000	8,063,200
28-Aug	6,859,000	7,816,700
4-Sep	6,278,100	3,775,800
11-Sep	4,658,800	2,831,300
18-Sep	3,219,000	1,937,300
25-Sep	3,257,300	1,922,200
2-Oct	2,595,100	1,529,200
9-Oct	1,948,900	365,600
16-Oct	1,118,300	148,000
23-Oct	855,200	132,800
30-Oct	899,400	107,500
6-Nov	474,200	3,600
13-Nov	432,700	2,000
20-Nov	281,400	3,100
27-Nov	302,800	-
4-Dec	247,800	-
11-Dec	455,500	12,800
18-Dec	2,200	-
25-Dec	7,600	6,900
31-Dec	12,800	10,100
<b>Total</b>	<b>306,000,000</b>	<b>306,000,000</b>

<b>WEEKLY VOLUME SUMMARY</b>				
(Volume in Pounds)				
	Week Ending 03/06/2022		Season-to-Date since 11/01/2021	
	(CA) Harvest / (Import) Arrivals	Shipped by AMRIC Handlers	(CA) Harvest / (Import) Arrivals	Shipped by AMRIC Handlers
	<b>California Detail</b>			
HASS	7,609,622	8,181,111	41,718,335	30,472,033
LAMB	0	0	0	0
GEM	5,628	0	5,628	0
OTHER	4,600	22,025	243,185	219,075
<b>CALIFORNIA TOTAL</b>	<b>7,619,850</b>	<b>8,203,136</b>	<b>41,967,148</b>	<b>30,691,108</b>
<b>INDUSTRY ADJUSTED</b>	<b>7,772,042</b>	<b>8,368,961</b>	<b>42,801,514</b>	<b>31,322,456</b>
	<b>Imported Hass Detail</b>			
MEXICO	54,698,831	22,048,067	832,003,402	519,987,295
PERU	0	0	0	772,362
CHILE	1,090,000	789,832	9,917,418	8,737,728
COLOMBIA	730,000	296,575	5,710,000	2,570,200
NEW ZEALAND	0	0	0	0
DOMINICAN	0	37,000	940,000	1,402,825
<b>IMPORT TOTAL</b>	<b>56,518,831</b>	<b>23,171,474</b>	<b>848,570,820</b>	<b>533,470,410</b>
	<b>Other Detail</b>			
CA EXPORT	0	30,000	0	203,000
CA ORGANIC	0	650,043	0	2,302,085
IMPORTED (Greens)	4,110,000	0	36,570,000	0
FLORIDA	0	0	6,024,260	0
<b>GRAND TOTAL</b>	<b>68,400,873</b>	<b>31,540,435</b>	<b>933,966,594</b>	<b>564,792,866</b>

Arrival figures are provided by associations or AMS. All other figures are derived from AMRIC.