

WATER SUPPLY CONDITIONS IMPROVE, BUT WILL IT BE ENOUGH TO AVOID RATIONING?

In early January 2009, the Metropolitan Water District estimated that there was a 1 in 2 chance it would need to implement some level of rationing, starting this July, under its Water Shortage Allocation Plan (WSAP). The remainder of January brought dry conditions and further analysis of the impacts of the recently released Biological Opinion for the Delta smelt. Based on the analysis and lack of precipitation, Metropolitan revised its estimate of the chances of rationing upward to 3 in 4 in early February and indicated that mandatory reductions for urban customers could go as high as 30%. Since then, heavy precipitation in key watersheds feeding the State Water Project (SWP) has improved conditions such that SWP contractors, including Metropolitan, will likely avoid receiving a record-low allocation in 2009. While Metropolitan has not officially revised its estimate for implementing the WSAP, with precipitation in these watersheds at 148% of normal in February and more rain and snow in the forecast, indications are that the chances of WSAP implementation are now closer to 1 in 2 again, with a lower level of rationing (5% - 10%) likely if any rationing is necessary at all.

While critical, ultimately the 2009 hydrology will be one of many factors that determine if and how much Metropolitan rations its supplies. The Governor's call for rationing, rationing's impacts on Metropolitan's finances and rates, and how much of their dwindling storage reserves the Department of Water Resources and Metropolitan want to save for future years will all impact these decisions. For more information please visit the Southern California Agricultural Water Team Web site at www.scawt.com.

PREPARE FOR GROVES AHEAD OF FRIGID WEATHER

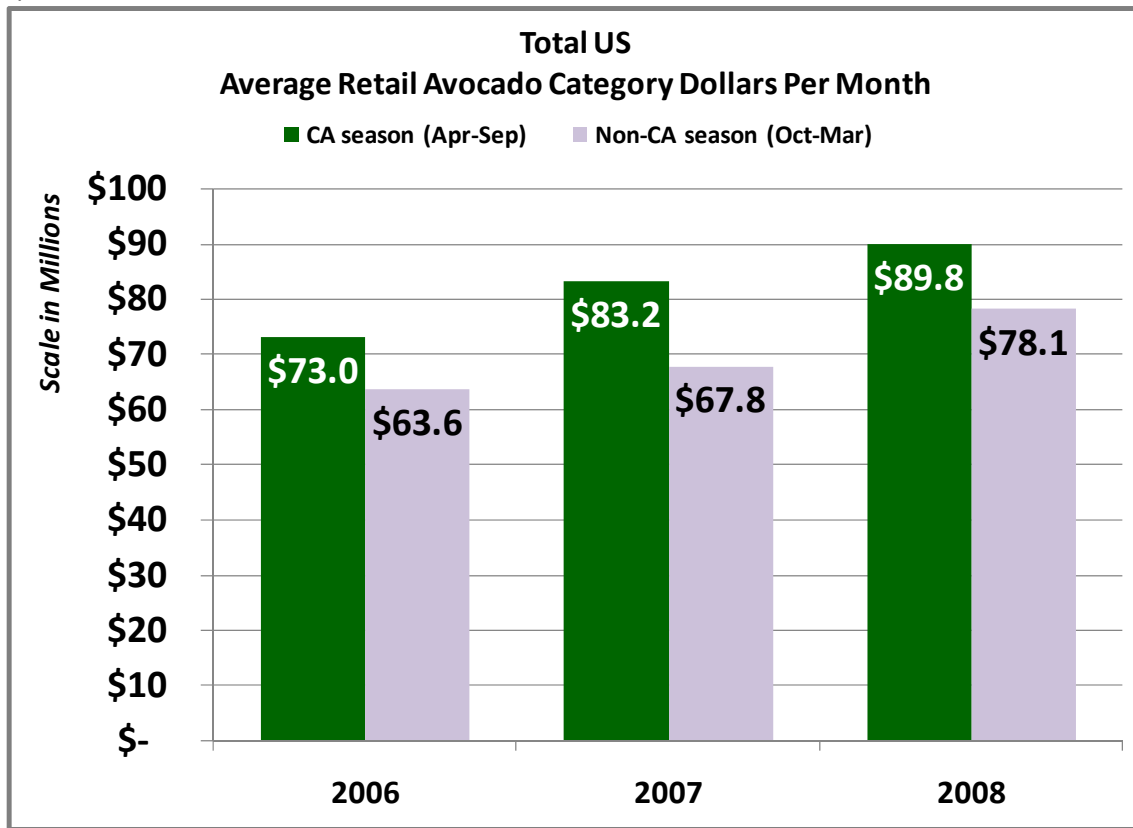
The 30-day Weather Outlook is calling for a significant freeze event over multiple nights from March 8th – 14th (see the Weather Outlook section in this issue of the Greensheet and follow your local and regional weather forecasts closely.) The forecast currently calls for a series of wet storms followed by very cold dry air dropping down from the Arctic. If this scenario plays out we will have a high risk of orchard damage, particularly to pushing floral buds. It is important to watch the dew point temperatures during these cold dry nights, if these are very low and particularly if accompanied by winds above 3 mph, it may be unwise to use irrigation for freeze protection as this can exacerbate damage. If the air mass lacks an inversion layer due to air movement or low humidity the use of wind machines and helicopters can exacerbate freeze damage. Go to www.avocadosource.com to learn more about California freezes and past experiences. For post-freeze assessment of crop and orchard losses please see: http://www.avocado.org/admin/upload/FREEZEWATCH_Flyer-DEC2009.pdf

CAC CONSUMER AD CAMPAIGN FEATURED IN RETAIL PRESENTATIONS

The California Avocado Commission (CAC) Consumer Advertising Kit is an important tool used by the CAC merchandisers in their retail meetings, highlighting the value of merchandising and promoting California Avocados. Retail planning meetings for the 2009 California season began in late February and will continue throughout the season.

CAC's retail presentation incorporates information on consumer trends and avocado purchase behaviors in support of the California Avocado Grower Campaign. Crop information is provided as well as information on the CAC materials available to support retail promotions including Point-of-Sale (POS) materials and recipes for in-store displays featuring California Avocados.

Retailers are provided insights from the 2008 Avocado Tracking Study addressing shifts in the consumer mindset as they are increasingly concerned with food safety and knowing where their food is produced. Information on the retail performance potential of California Avocados is also discussed.



For instance, the chart above shows that in 2008, grocery stores throughout the country achieved between 7 and 26 percent more avocado category dollar sales during the California Avocado season than during the non-California Avocado season months, yielding a total of 69.9 million more avocado retail dollars than the non-California season. On a store-by-store basis, this ranges from \$600 to \$3,900 more during the California Avocado season, which equates to \$100 to \$655 more per store, per month. This information is invaluable in assisting with informed retail purchase and merchandising decisions related to California Avocados.



Grocery Cart Ad image shown above. These ads will be utilized in Los Angeles markets, San Diego, San Francisco/Bay Area markets, Sacramento, Phoenix, Seattle and Portland

CAC also offers retail support to generate impulse purchases with in-store marketing via *Hand Grown in California*-themed display bins, grocery cart inserts, retail POS cards, danglers (hanging avocado-shaped cards), channel strips (to be affixed on the display) and in-store radio via the Instore Broadcasting Network (IBN).



Image of the Health Club Posters shown above. These ads will be posted in Los Angeles, San Diego, San Francisco/Bay Area, Sacramento, Phoenix, Seattle and Portland markets

CAC's integrated marketing approach including in-store support, radio, outdoor, fitness center, print advertising, consumer public relations, nutrition communications with foodservice promotions and online marketing creates top of mind awareness of and demand for California Avocados in season. As an added incentive to encourage participation in California Avocado promotions, CAC offers retailers valuable radio tags in support of feature ad and in-store promotions with California Avocados. Look for more updates on the 2009 California Avocado Grower campaign in future issues of the Greensheet.

CAC RECIPE FEATURED IN MED DIET E-MAIL

Mediterranean Food Alliance's Fresh Friday's recipe e-mail featured CAC's –Open Face Curried Avocado/Tomato Sandwich as a "perfect Super Bowl snack."

MEETINGS

CAC Board Meeting - March 19, 2009

HAB Board Meeting - March 26, 2009

Grower Seminars:

Tuesday, April 14th 1:00 p.m. – 4:00 p.m.

Cooperative Extension County Office / Auditorium 2156 Sierra Way, San Luis Obispo

Wednesday, April 15th 9:00 a.m. - 12:00 p.m.

Cooperative Extension County Office / Conference Room 669 County Square Dr., Ventura

Thursday, April 16th 1:00 p.m. – 4:00 p.m.

South Coast Winery Resort 34843 Rancho California Rd., Temecula

TOPICS:

BUGS! Pest Research Updates & Panel Discussions with Researchers and Entomologists

Drs. Joe Morse and Mark Hoddle, UCR Entomology Department, will provide research updates on avocado pests in California as well as the threat several species pose by way of introduction and industry invasion. The presentations will be followed by Q&A. A panel comprised of Drs. Morse and Hoddle, and local PCA's will answer questions presented.

Tools For Thrips Control - What is New and What is Changing in Pest Control Products

Dr. Guy Witney, CAC Industry Affairs, will discuss new products in line for registration on avocados and what we can expect from them. The big-picture issues shaping the future of pest management in avocados will also be discussed. Dr. Witney and Representatives from DOW AgriScience will present information about the latest thrips control product

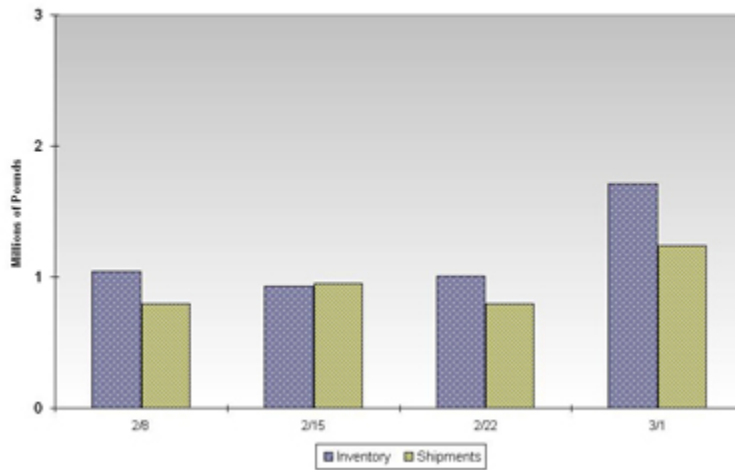
registered for use on avocados, *Delegate*. A combined panel of the researchers and local entomologists will field a Q & A session

4th Australian and New Zealand Avocado Growers Conference July 21-24, 2009 - Cairns Convention Centre Cairns, Queensland, Australia. For Further information, contact the conference managers: info@anzagc.org
Phone: +61 7 3858 5528 Fax: +61 7 3858 5499 Online: www.anzagc.org

CALIFORNIA AVOCADO MARKET TREND

Average Weekly Price ¹						
Size	This Week 3/1/2009		Last Week 2/22/2009		Season-to-Date (since 11/1/08)	
	Lug \$	Cents/Lb	Lug \$	Cents/Lb	Lug \$	Cents/Lb
Hass						
32	\$ 29.45	\$ 1.03	\$ 28.84	\$ 1.00	\$ 29.60	\$ 1.03
36	\$ 29.50	\$ 1.03	\$ 29.47	\$ 1.03	\$ 30.19	\$ 1.06
40	\$ 29.65	\$ 1.04	\$ 28.77	\$ 1.00	\$ 30.86	\$ 1.08
48	\$ 29.52	\$ 1.03	\$ 29.84	\$ 1.04	\$ 29.93	\$ 1.05
60	\$ 26.11	\$ 0.89	\$ 26.31	\$ 0.90	\$ 26.35	\$ 0.90
70	\$ 21.56	\$ 0.71	\$ 22.61	\$ 0.75	\$ 21.99	\$ 0.73
84	\$ 19.28	\$ 0.62	\$ 20.87	\$ 0.68	\$ 18.85	\$ 0.60
Organic	\$ 33.09	\$ 1.17	\$ 33.74	\$ 1.20	\$ 33.04	\$ 1.17
#2's	\$ 21.93	\$ 0.73	\$ 21.83	\$ 0.72	\$ 19.03	\$ 0.61
Fuerte	\$ 9.00	\$ 0.21	\$ 10.75	\$ 0.28	\$ 12.62	\$ 0.35
Bacon	\$ 11.01	\$ 0.29	\$ 11.28	\$ 0.30	\$ 10.60	\$ 0.27
Pinks	\$ 10.68	\$ 0.28	\$ -	\$ -	\$ 11.17	\$ 0.30
Lamb	\$ -	\$ -	\$ -	\$ -	\$ 26.74	\$ 0.92
Other	\$ 11.45	\$ 0.31	\$ 10.50	\$ 0.27	\$ 9.94	\$ 0.25
Previous Year Comparison						
Hass						
32	\$ 34.93	\$ 1.25	\$ 34.76	\$ 1.24	\$ 32.02	\$ 1.13
36	\$ 34.69	\$ 1.24	\$ 34.65	\$ 1.24	\$ 34.20	\$ 1.22
40	\$ 33.25	\$ 1.18	\$ 34.91	\$ 1.25	\$ 37.38	\$ 1.35
48	\$ 34.44	\$ 1.23	\$ 33.59	\$ 1.19	\$ 36.23	\$ 1.30
60	\$ 27.81	\$ 0.96	\$ 26.22	\$ 0.90	\$ 31.86	\$ 1.12
70	\$ 21.49	\$ 0.71	\$ 20.69	\$ 0.68	\$ 27.65	\$ 0.96
84	\$ 15.92	\$ 0.49	\$ 15.03	\$ 0.45	\$ 21.75	\$ 0.72
Organic	\$ 43.44	\$ 1.59	\$ 41.58	\$ 1.51	\$ 41.43	\$ 1.51
#2's	\$ 20.39	\$ 0.67	\$ 19.97	\$ 0.65	\$ 20.62	\$ 0.67
Fuerte	\$ 11.95	\$ 0.33	\$ 12.05	\$ 0.33	\$ 11.62	\$ 0.31
Bacon	\$ 9.29	\$ 0.22	\$ 10.15	\$ 0.26	\$ 10.64	\$ 0.28
Pinks	\$ 12.57	\$ 0.35	\$ 10.03	\$ 0.25	\$ 11.09	\$ 0.29
Lamb	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other	\$ -	\$ -	\$ -	\$ -	\$ 9.71	\$ 0.24
*Lug Prices include \$3.75 packing charge						

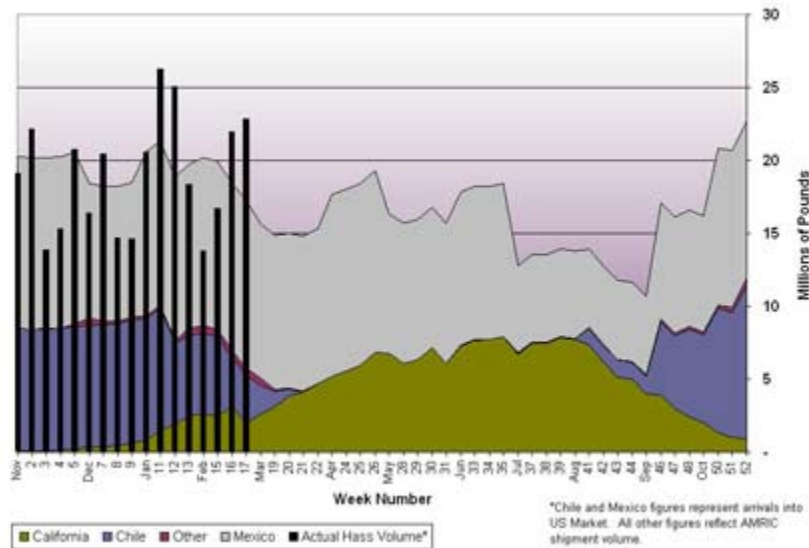
4-Week California Inventory and Shipment Volume



AVOCADO VOLUME IN A U.S. MARKET

Avocado Volume Summary				
	This Week	Last Week	Season-to-Date	Est %
	3/1/2009	2/22/2009	(Since 11/1/08)	Complete*
				(thru Oct 09)
Hass	1,095,000	715,150	6,228,400	3%
Lamb-Hass	-	-	113,929	1%
Greens	144,421	81,916	1,234,558	19%
CA Total	1,239,421	797,066	7,576,887	4%
Chile	2,966,725	2,775,300	56,793,307	32%
Mexico	18,741,084	18,457,479	256,306,422	51%
Other	26,725	5,800	2,415,625	20%
Florida	76,175	160,545	14,052,327	26%
USA Total	23,050,130	22,196,190	337,144,568	35%

*Percentage complete are estimates based on current projections.



30 DAY WEATHER OUTLOOK

By Fox Weather

Longwave trough over California this week will push inland over the great basin next week. Significant and cold storms will occur on March 5-6th, then cold showery/snowy conditions in the Sierra Nevada on the 7th, followed by another cold showery storm with heavy snow in the Sierra Nevada on the 9th. Cold and dry over most of California with freeze risk multiple nights during March 8-14th, with freeze risk greatest during March 9-13th over most of California. Upper low pressure recurring with cold showery periods and low snow levels March 9-10th in southern California mountains, and a chance for showers in the Southern California deserts and in Arizona. It almost looks like a Yukon express type pattern, at least for central and Northern California, although these are more common during December-February. Finally we get a sunny break with offshore flow in Northern California on 13-14th. It appears that we'll see more rains into northern and possibly Central California during the 15-18th as high pressure from the 13-14th breaks down and troughs arrive again from the west.

March 18-April 5: a cool trough-type pattern will continue with the longwave trough lingering near or over California. We'll see an increase in cutoff low formation over and near Southern California with showers and thunderstorms a possibility over the mountains and deserts of Southern California and the Southern Sierra Nevada. Freeze risk will be above normal for Northern and Central California spring bloom season, and some of these freeze events could still reach into Southern California at times. Rainfall expected above normal for the southern deserts and Western Arizona, and near normal for the rest of California. Support will continue for cutoff lows and troughs near Baja California and Southern California into the first part of April. Near or above normal snowfall can be expected for the Sierra Nevada during this period.