

Dan Legard, VP Research & Education

California Strawberry Commission Update

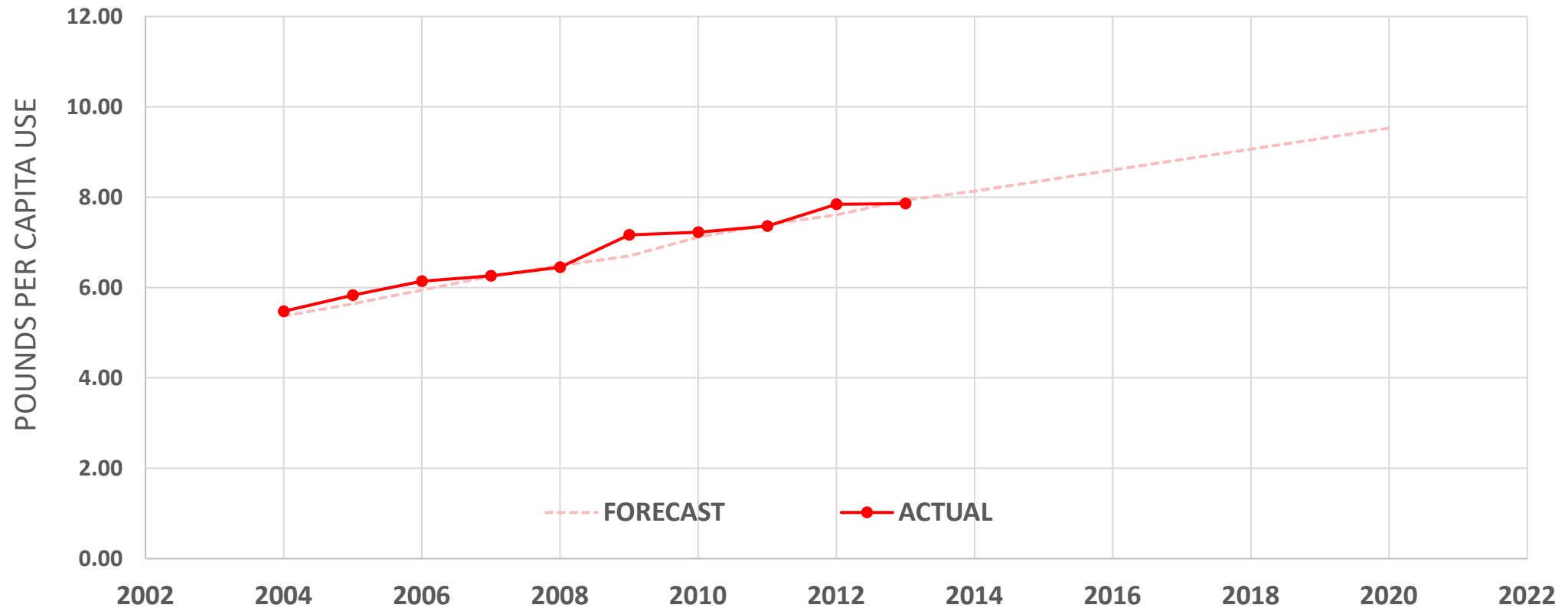
Strawberry Industry Trends

- All from federal data sources (with some CSC data)

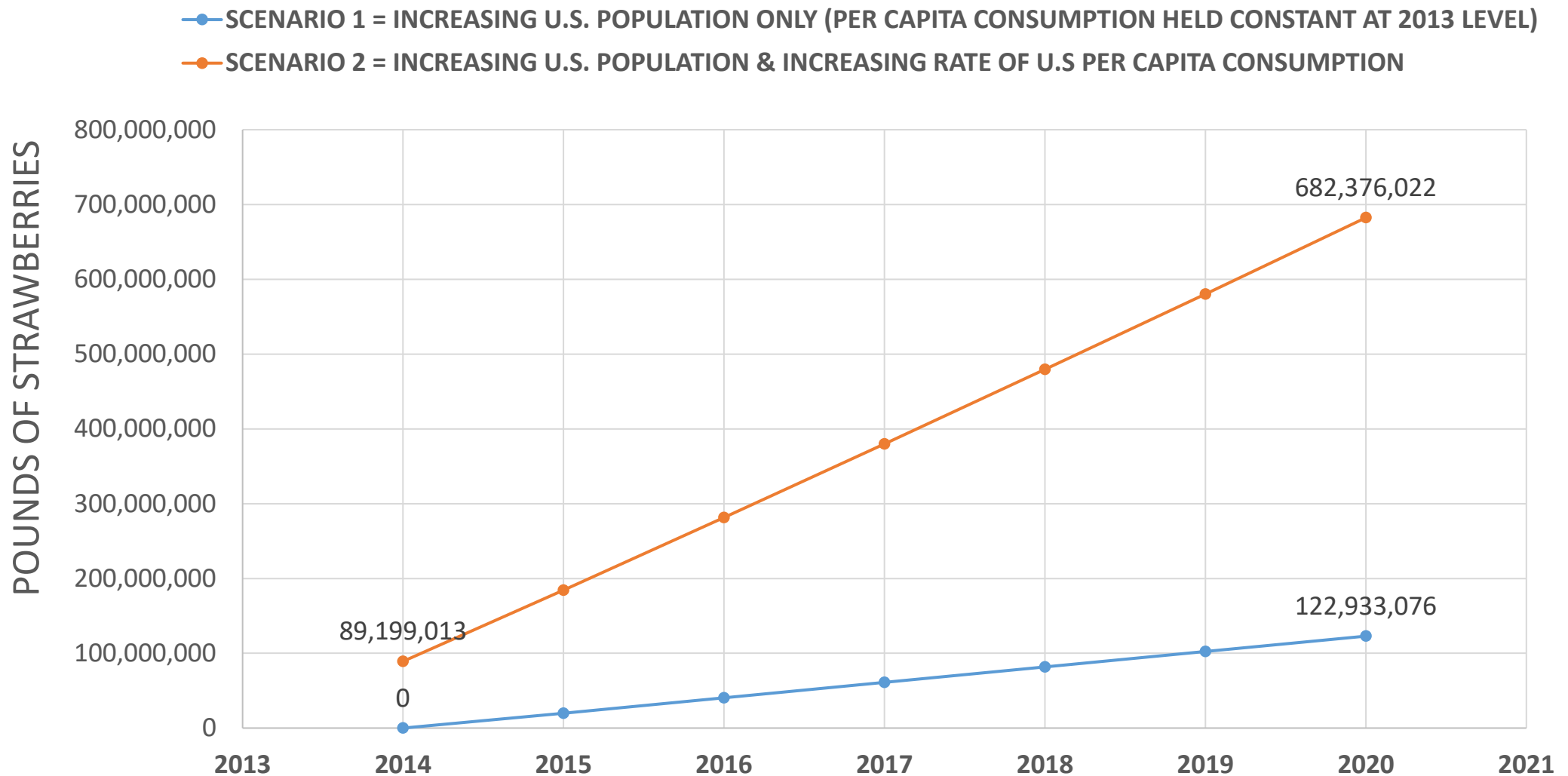
The “Good” News

Consumption Is Increasing (Lbs per Capita)

STRAWBERRY PER CAPITA CONSUMPTION FORECAST

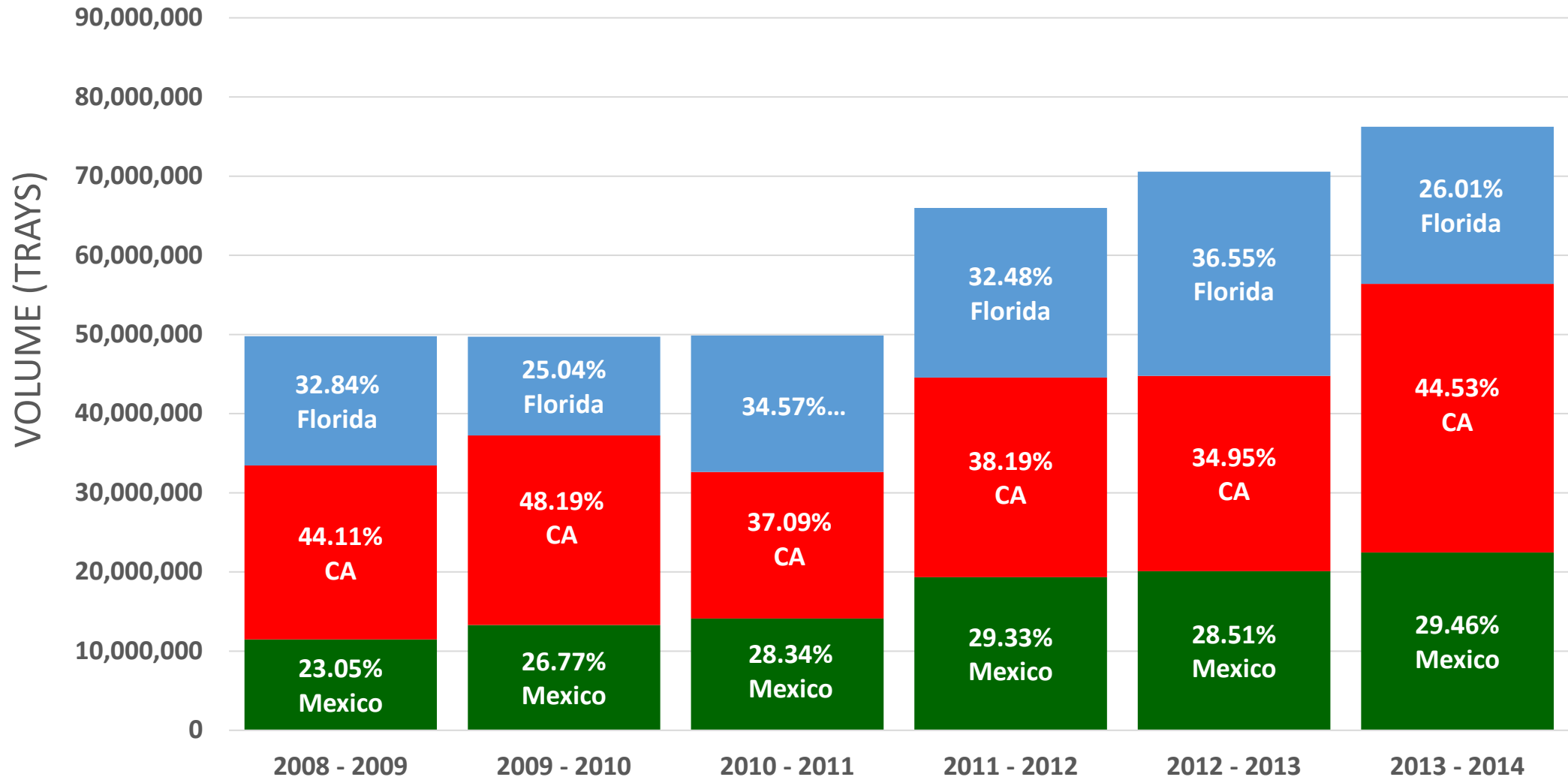


Projected Increase in U.S. Strawberry Consumption (Fresh)

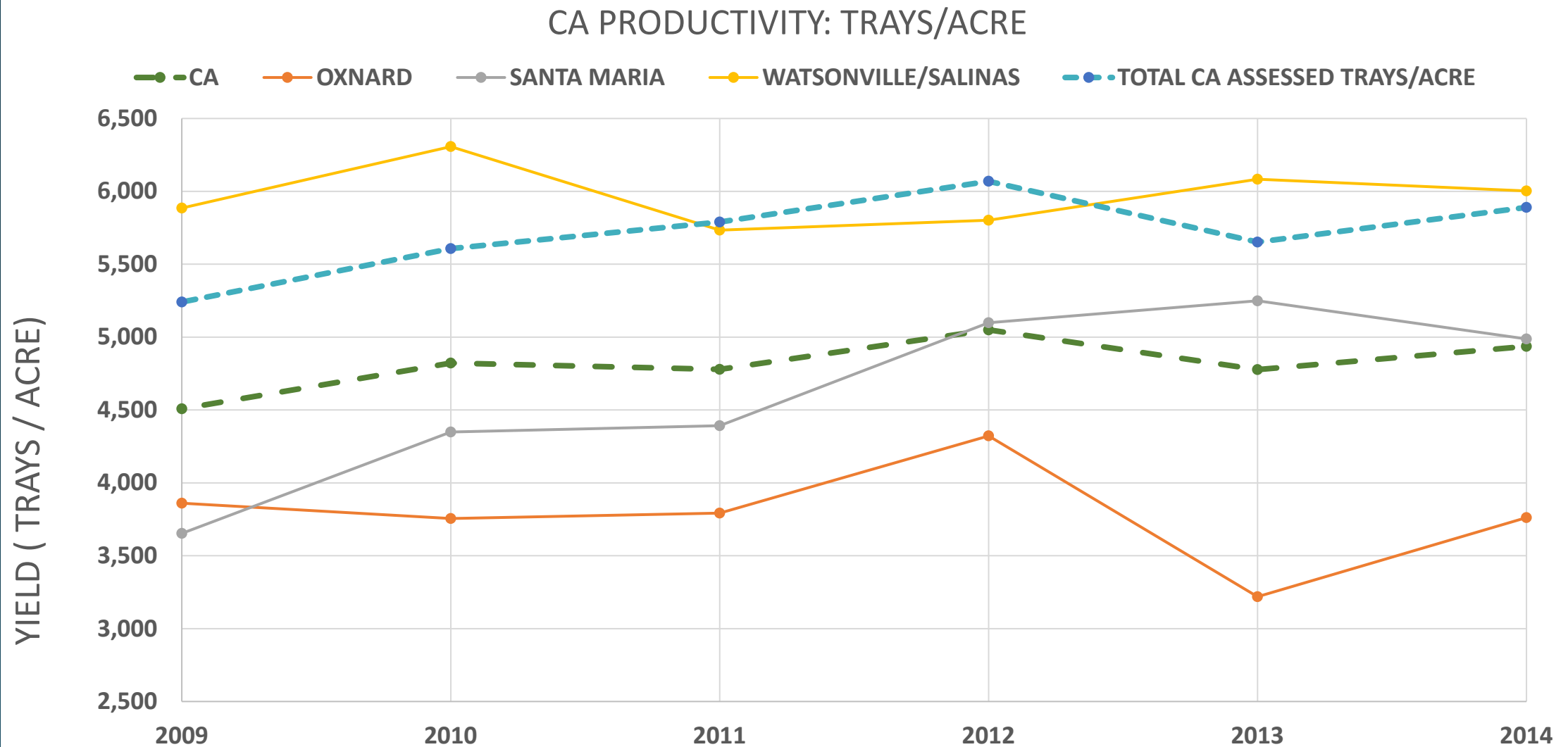


Strawberry Winter Market Share

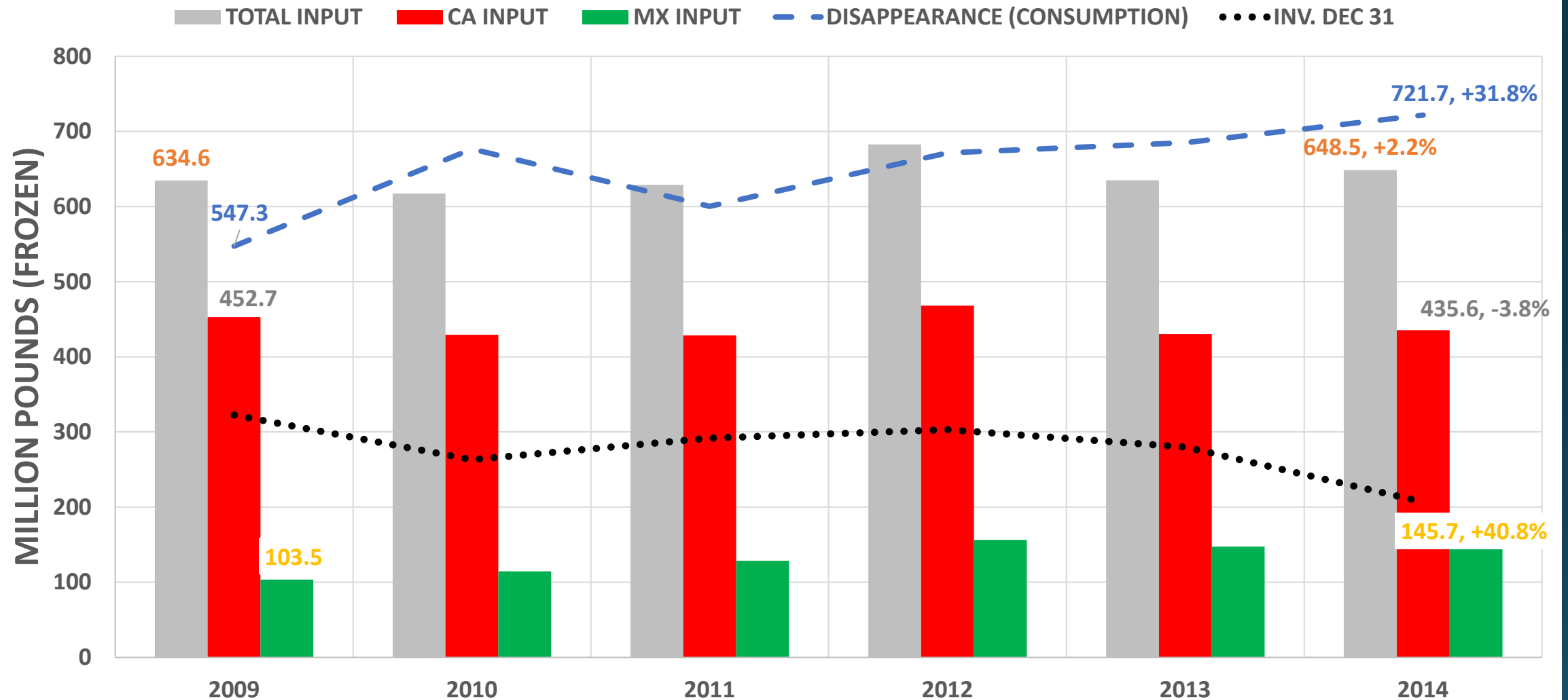
U.S. MARKET SHARE BY VOLUME: NOV 1ST - MARCH 31ST



Average Trays per Acre Since 2009

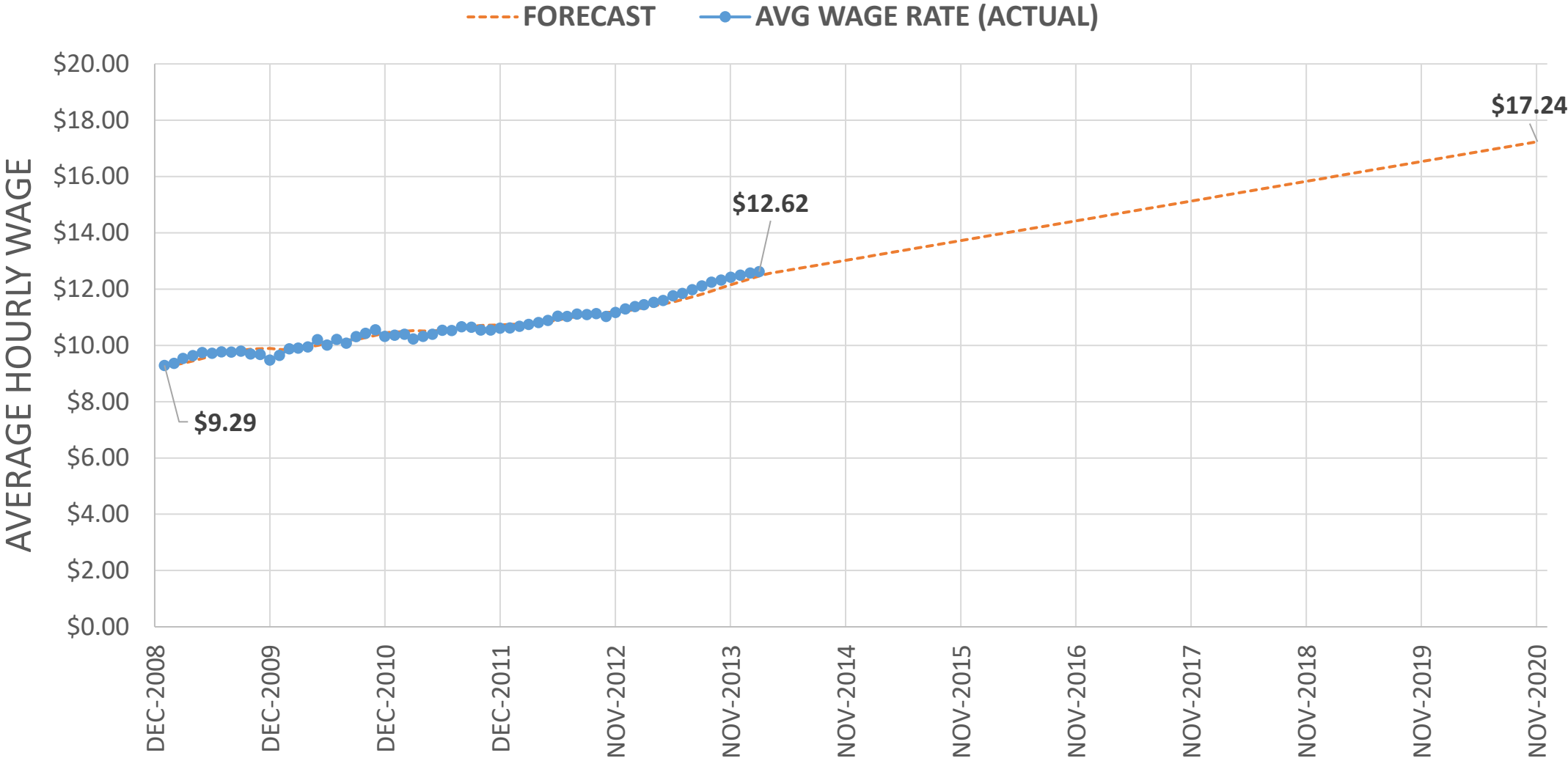


Frozen Strawberry Consumption, Production & Inventory

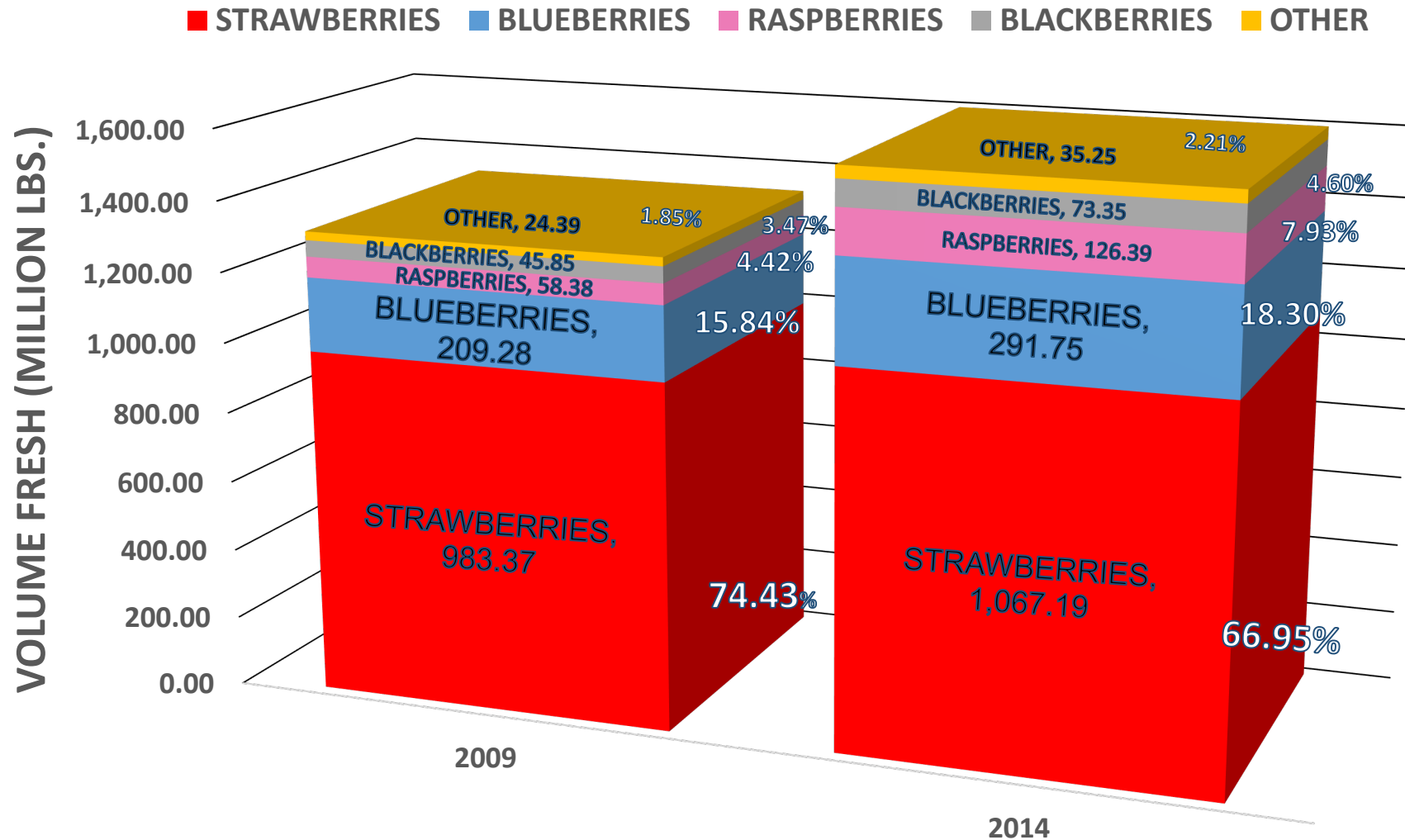


The Not So Good News

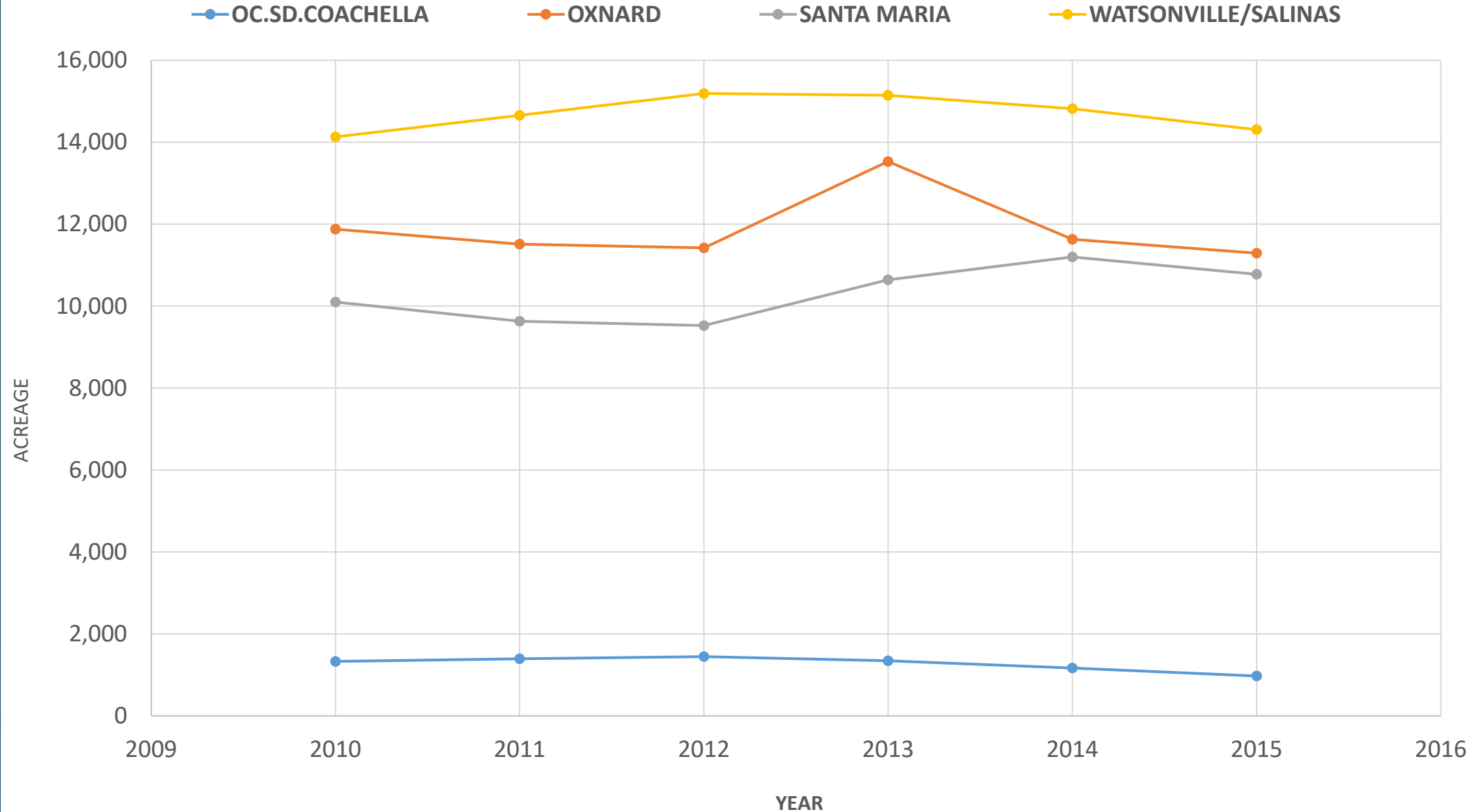
Wage Rates & Trends for all CA Berry Crops



Strawberries are Losing Market Share to Other Berries



Strawberry Acreage by District in CA



Retail & F.O.B Price Per Lb.

