

CALIFORNIA PRUNE BOARD
Annual Update
2022-2023



Driving Industry Success in 2023

A MESSAGE FROM THE EXECUTIVE DIRECTOR

It's been said that change is the only constant in life, and in the prune industry, we know that to be true. The last year has brought with it changes in market dynamics, compounded by the ever-evolving realities of food and agriculture production. Through it all, we stand alongside you to remain resilient – and there is much to be proud of, which you can learn about in this annual update.

Globally, amid geopolitical and economic headwinds, California Prunes have maintained premium positioning in the marketplace. This didn't happen by accident. It's the result of our industry's ability to adapt and bring to market the ultimate, premium, sustainably grown product. At the California Prune Board (CPB), we are proud to help share this story through domestic and global marketing that helps build awareness and drive returns to the industry. You can learn more about these efforts in subsequent pages, including how we are demonstrating the "California difference."

Looking ahead, we are pursuing even more ways to expand visibility by adding new partnerships and

fresh thinking to support our marketing efforts. Our nutrition research (See Page 14) continues to unlock new opportunities that showcase the myriad of health benefits of the fruit we produce. In doing so, California Prunes can be introduced to a new generation of prune consumers.

We're also investing in production research (See Page 12) that seeks to expand options and improve returns to growers. We do this knowing there can be no "California difference" without elevated practices that produce premium, sustainable fruit while supporting profitability.

While we work on your behalf, we see the effort you are putting in every day and recognize our role as an extension of the industry. We're here to serve growers and handlers of all sizes and scales, and are not taking our foot off the pedal as we work hard for your success. We encourage all members of the industry to join us. I have no doubt that together our collective efforts will chart a course for a bright future for California Prunes.



A handwritten signature in black ink that reads "Donn Zea".

Donn Zea
Executive Director
California Prune Board



Want to learn more? Scan the QR codes that are included throughout the report for a deeper dive into the section.

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Getting Better and Better: California Prune Board Continuously Improves

CHAIRMAN GEORGE SOUSA JR.

I've been involved with the California Prune Board (CPB) for more than 35 years and sit on numerous other boards. The work that happens with this group is something special. Whether it's a meeting of the Executive Committee, the full Board or a gathering of the entire industry like the Prune Summit (See Page 18), there is a sense of industry collaboration, transparency and enthusiasm for shared success you can't find in many other places.



The elected Board members and staff work with passion, rooting all their work in the strategic plan (See Page 5) and running CPB like a small business. This means using resources wisely, and always looking for ways to get the most bang for our buck to achieve our vision and make the industry more successful. It means acting with grit, and not being afraid to carefully and strategically try new things. It also means not only addressing short-term challenges and opportunities, but also planning for a thriving California Prune industry for decades to come. This entrepreneurial spirit has resulted in a mindset of continuous improvement across all areas of the Board and the activities we invest in.

CPB is focused on five strategic priorities in its strategic plan:

- Production Research that aims to lower costs, improve quality and protect industry investments.
- Nutrition Research that expands our understanding of the health benefits of California Prunes.
- Trade Policy and Market Support that facilitates government purchases, ensures steady funding for export promotion and research, and advocates on behalf of the California Prune industry.
- Expanding Visibility aimed at driving industry success through increased demand and value for California Prunes.
- Creating a Unified Industry.

For the last priority – bringing the industry together – we need your help. While CPB staff are extraordinary, the industry is best served when growers and handlers are willing to roll up their sleeves, put aside their company hats and work together for efforts that benefit all. By doing so, we can better shape our future. That's why I got involved, and I encourage you to join me and others in developing a sustainable industry for generations to come.

Cheers,

A handwritten signature in black ink that reads "George Sousa Jr." The signature is written in a cursive, flowing style.

George Sousa Jr.
Chairman

New Board Members Coming Soon!

Eligible growers and handlers will soon receive ballots to participate in the upcoming California Prune Board election. The newly elected Board will begin June 2024 and be in place for two years.

Strategic Plan At A Glance

Mission:

Unite growers and packers to drive essential activities that support the California Prune industry.

Vision:

A world enthusiastic about California Prunes.

Purpose:

Promote lifetime wellness through the enjoyment of California Prunes.

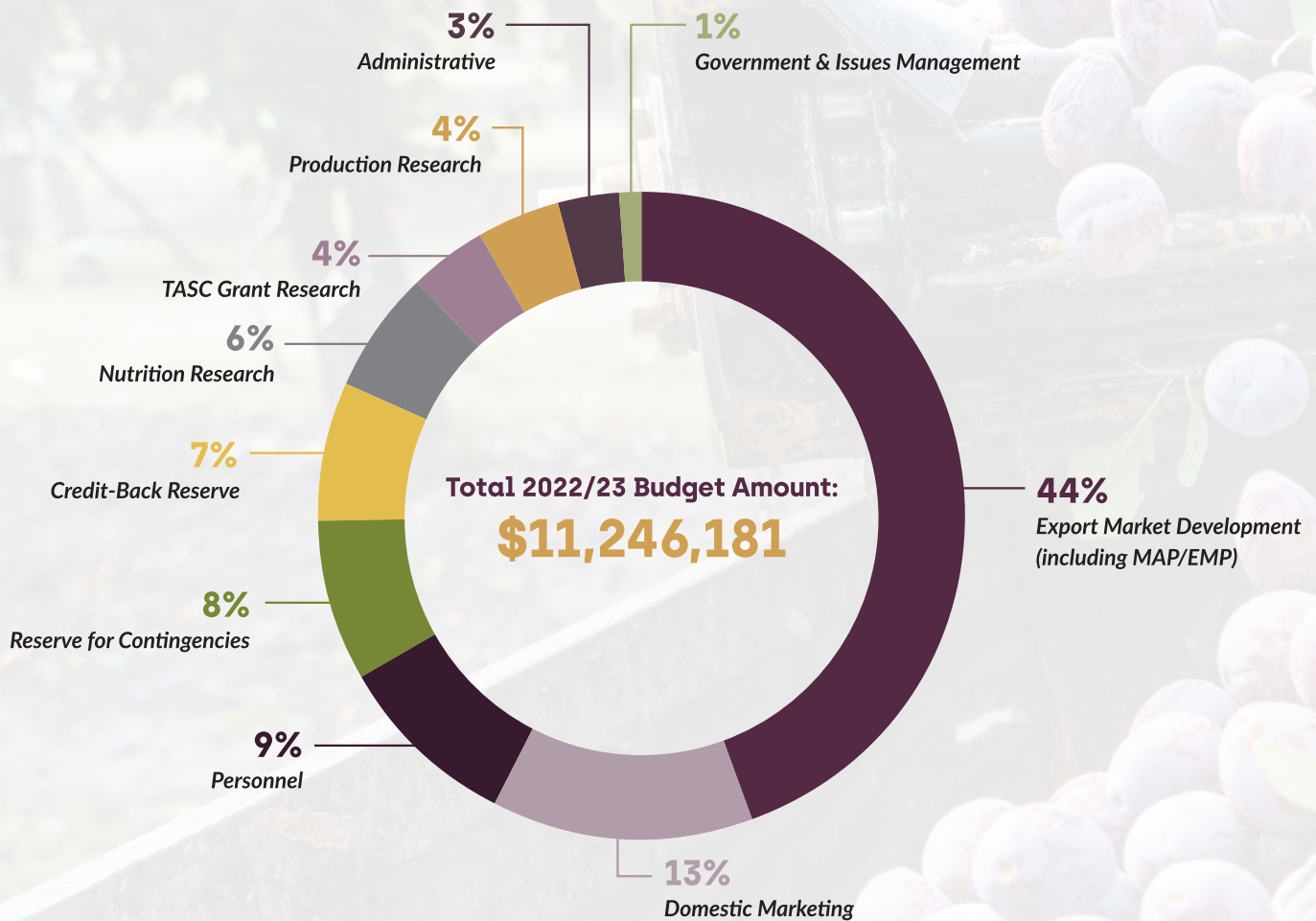
Values:

- Collaborate with integrity.
- Engage in respectful dialogue.
- Embrace challenge and change.
- Commit to prune quality and continuous improvement.
- Have an attitude of customer service towards our stakeholders.



Budget Allocation

The financial information below provides an overview of the 2022/23 budget allocations, as established and overseen by the individual committees and the entire California Prune Board.



“The California Prune Board works hard to maximize the dollars entrusted to it, using resources wisely and effectively. In addition, great care is taken to ensure transparency and accuracy in financial reporting — and each year the Board receives a clean audit from our outside auditor.”

— MIKE VERESCHAGIN, Audit Committee Chair

Actual Financial Results

Assessment Income:	\$5,241,973
Generic Market Access Program:	\$2,740,958
Emerging Markets Program:	\$334,597
TASC Grant Income:	\$435,604
Other Income:	\$35,275

Total Income: \$8,788,407

Export Market Development:	\$4,671,674
Domestic Marketing:	\$1,443,289
Personnel:	\$976,674
Credit-Back:	\$581,276
Production Research:	\$448,479
TASC Grant Research:	\$435,604
Administrative:	\$448,428
Government & Issues Management:	\$154,450
Nutrition Research:	\$127,176

Total Expenditures: \$9,287,050

Beginning Balance of Funds:	\$1,696,310
Ending Balance of Funds:	\$1,197,667



About the California Prune Industry

ECONOMIC IMPACT AND
ACREAGE QUANTIFIED

The California Prune industry is a world leader, supplying over 90% of the domestic market and serving as the largest player in the global market, with approximately 40% market share. In addition, during the last five years, California Prunes have generated a higher price when compared to the competition globally, showcasing the premium positioning of California Prunes as the ultimate, sustainably grown product.

The California Prune Board (CPB) is carefully tracking bearing and non-bearing acres in California and is sharing that information here, as it is central to balancing supply and demand, and maintaining premium value for the California Prune industry. The following section will showcase the latest report of standing prune acreage in California, premium value averages, overall world prune production and average prune prices.

By the Numbers

**\$160
million:**

The farm gate value of the California Prune crop each year

**\$717
million:**

The economic impact California Prune growers and handlers generate each year

**600
growers:**

The make up of the California Prune industry

**27
handlers**

process California Prunes, juice and ingredients

**over
90%**

of the U.S. total prune supply and 33% of the world's supply is grown in California

**over
\$2,300:**

The average prune price per ton

Source: USDA, NASS Walnut/Raisin/Prune Report State Summary

California Prunes have a
21% Premium Value

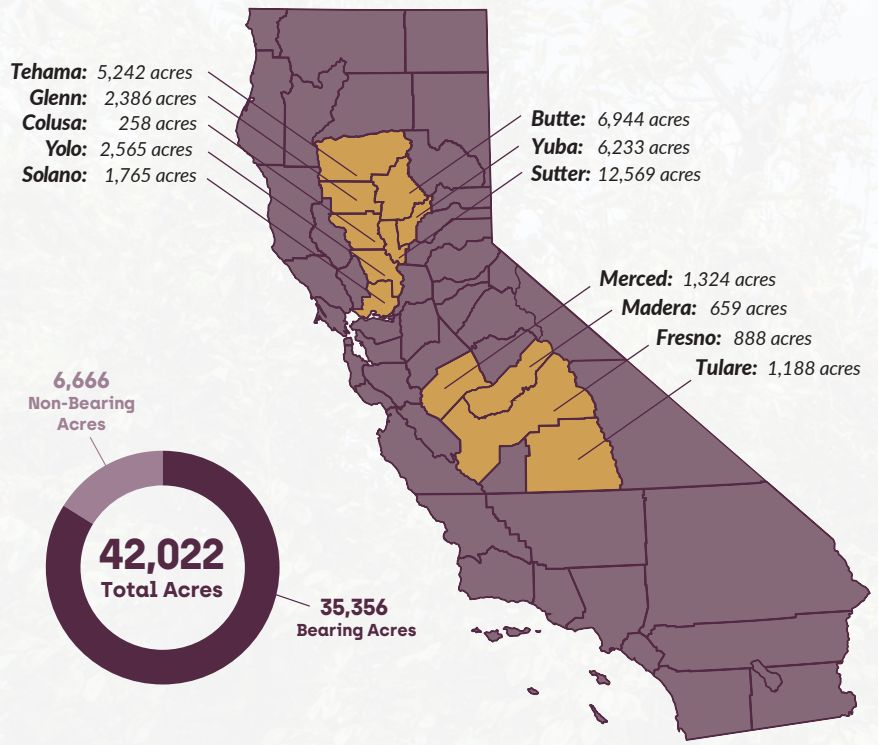
over major competition

(U.S. average value per MT of global exports)

Standing Prune Acreage

Standing Prune Acreage – December 31, 2022

County	Bearing	Non-Bearing ¹	Total
Butte	5,618	1,326	6,944
Colusa	201	57	258
Fresno	697	191	888
Glenn	2,034	353	2,386
Madera	631	28	659
Merced	1,212	112	1,324
Solano	1,300	465	1,765
Sutter	11,248	1,321	12,569
Tehama	4,550	692	5,242
Tulare	1,021	167	1,188
Yolo	1,064	1,501	2,565
Yuba	5,780	453	6,233
Total	35,356	6,666	42,022

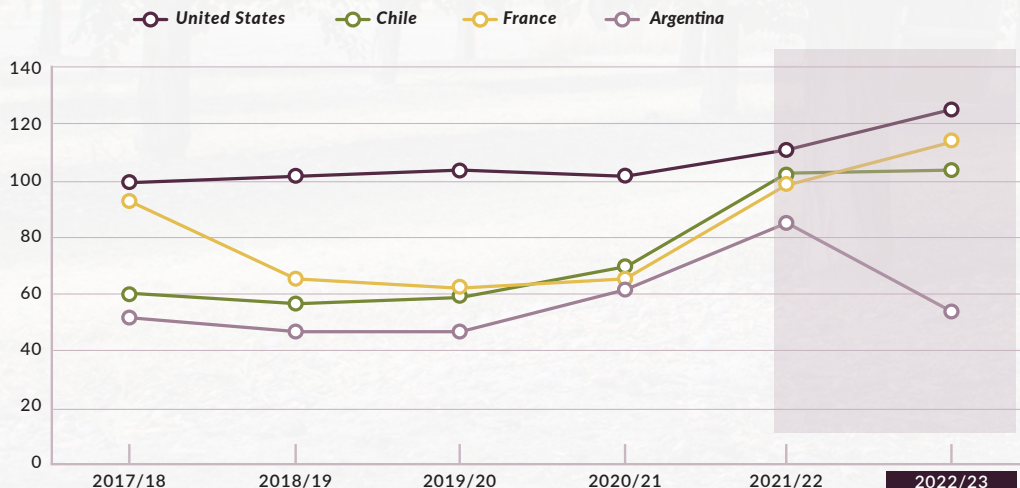


¹Planted between 2018 and 2022, inclusive.

California Prunes Retain Premium Value

The 2022/23 growing season saw California Prunes achieve a 21% premium over Chile, 10% over France and 122% over Argentina.

Average Value Per MT Index: trended over 5 years



Average \$ per MT:

(2022/23 Crop Year)

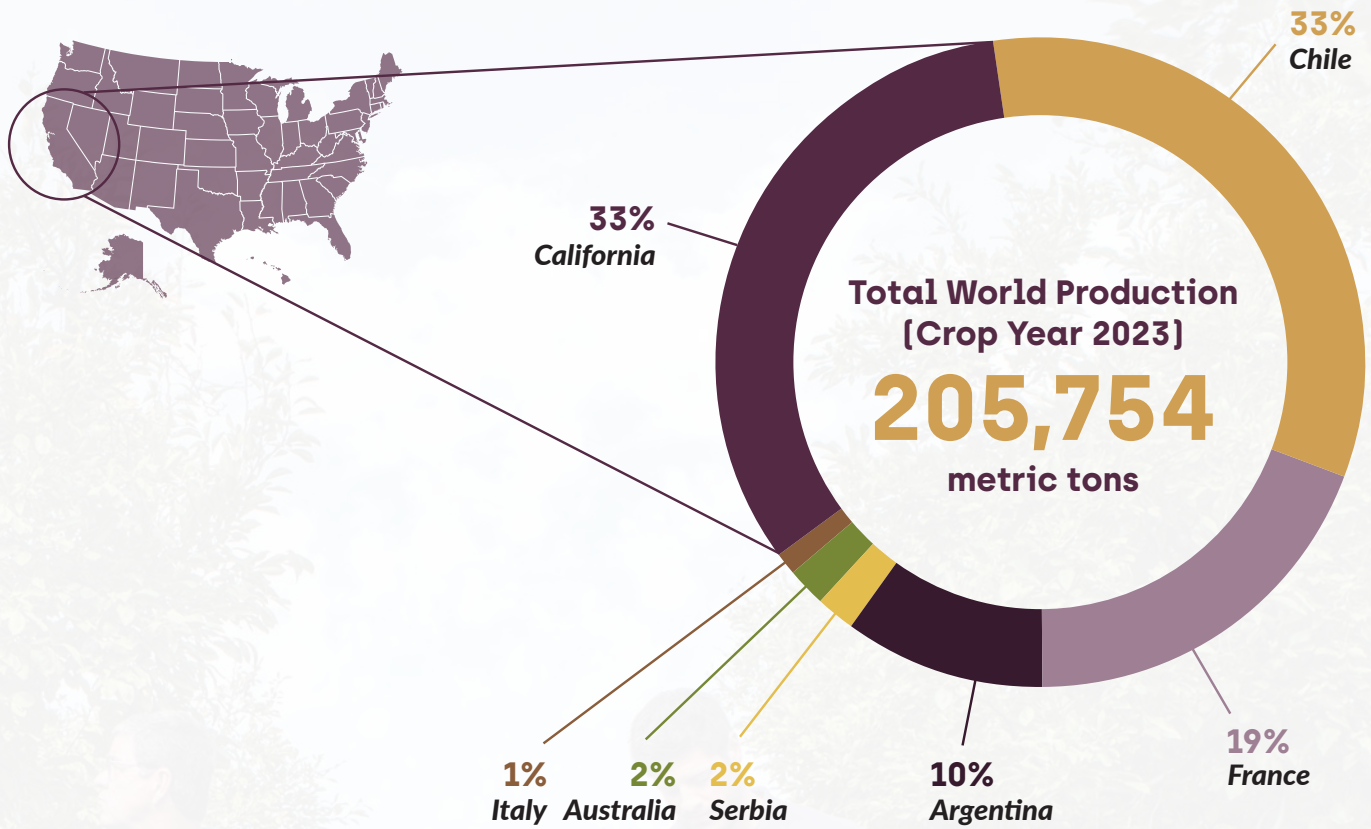
U.S.	\$4,922
CHILE	\$4,077
FRANCE	\$4,494
ARGENTINA	\$2,224

Ave. \$ per MT Change versus last year:

U.S.	+12%
CHILE	+2%
FRANCE	+14%
ARGENTINA	-35%

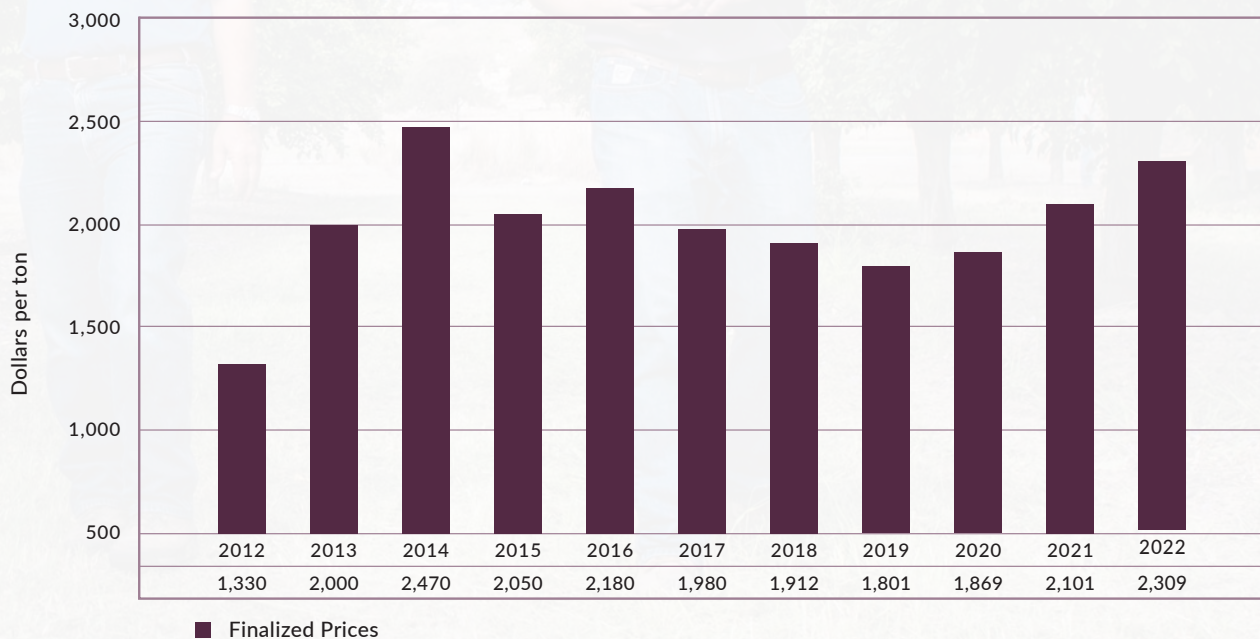
Source: TDM EXPORTS. All averages are indexed against the base value of U.S. Average Value per Ton in 2017/18 which was \$3,929.

World Prune Production



Average Prune Prices

Finalized and Non-Finalized Prices



Source: USDA, NASS Walnut/Raisin/Prune Report State Summary

Crop Management and Sustainability:

CALIFORNIA PRUNE BOARD AT WORK

At the crux of the California Prune Board's (CPB) efforts to drive demand and value for California Prunes is the positioning of prunes grown in the Golden State as the best in the world – and CPB's crop management and sustainability efforts are all focused on maintaining this premium positioning, while furthering the industry's competitive advantage.

Specifically, CPB's crop management and sustainability efforts, driven through production research, are aimed at decreasing production costs and risks, improving processing efficiency and worker safety, and championing Good Agricultural Practices while building a climate-smart production toolkit. This includes funding for innovations in drying technologies, as the world looks to a more sustainable future and the cost of natural gas escalates.

Over the last year, there have been several key accomplishments under this strategic priority, including significant strides in varietal research and securing state and federal funding for research that will ultimately benefit growers and handlers.

Varietal Program Plants Roots in Grower Orchards

Reduced drying costs, lengthened bloom time to mitigate the risk of weather-related bloom issues, and lengthened harvest time to help with labor issues are just a few of the many potential benefits from new varieties being researched by CPB as part of its varietal program.

First initiated in 1985, the program is in the process of evaluating 23 new varieties in conjunction with the University of California (UC), Davis.

Over the past year, the program has engaged in a shift from being a standard breeding program – creating new cultivars that increase genetic diversity of prunes – to a selection program where the best varieties are being placed directly in the field.

“The UC system has yielded some excellent work for the California Prune industry, and we thank them for their partnership,” said Zach Bagley, managing advisor, Production Research & Partnerships at CPB. “Now, we’re ready to see that research in action and put these varieties to the test by growing them out in large block trials directly in grower fields, which will be harvested and evaluated for their performance with our commercial handling partners.”

In addition to these changes, in 2024 CPB is transitioning the in-field management of the selection program to be operated out of a private nursery, Sierra Gold. This shift will allow for cost stability, management that is more representative of the industry standard, and will bring the potential of increased collaboration between UC Prune Breeding staff and the California Prune industry.

Opportunities are available for growers to participate in the program and be the first to experience some of the potential benefits of the new varieties. To learn more about how to get involved in the varietal program, scan the QR code to connect further.



Technical Assistance for Specialty Crops Grant Maintains EU Access

As part of its commitment to leverage outside research dollars when possible, CPB has secured funding through a Technical Assistance for Specialty Crops (TASC) grant to investigate the voids in residue associated with the use of sulfuryl fluoride for treating U.S. dried fruit and tree nuts. In doing so, CPB is ensuring continued access to the European Union through a program fully funded by the United States Department of Agriculture.

Nutrition Research:

CALIFORNIA PRUNE BOARD AT WORK

Investing in nutrition research is one of the cornerstones of the California Prune Board (CPB). This research identifies important, scientifically supported nutrition and health benefits of California Prunes and serves as a tool to expand visibility and support demand and value for California Prunes.

During the last fiscal year, the program had some big wins, including the culmination of findings from CPB's largest clinical trial to date and the coming together of the Nutrition Advisory Panel (NAP) in person for the first time since 2019. Comprised of researchers with expertise in various disciplines, the NAP's counsel is crucial to shaping CPB's research strategy to ensure the industry remains at the forefront of nutrition science. Importantly, all work of the panel is rooted in a carefully designed nutrition research roadmap.

The roadmap represents a 10-year strategy, developed in 2021, to advance California Prunes as the leading plant-based source to support healthy bones. Implementation of the roadmap is an opportunity to better understand the favorable "prune effect" on bone health at all life stages and expand knowledge of how prunes impact the connection between gut and bone health.

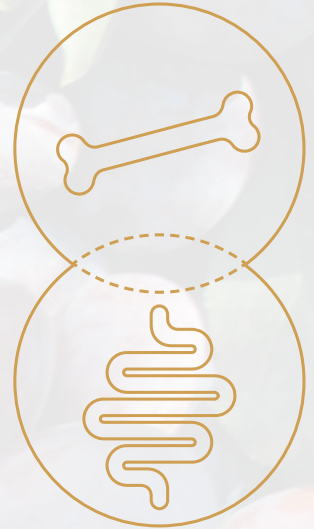
Unveiling the Power of Prunes: Bones, Gut Health and More

CPB's largest clinical trial to date is driving success. CPB first invested in The Prune Study, led by Dr. Mary Jane De Souza, PhD, at Pennsylvania State University, in 2016 and since has investigated how prunes provide various health benefits to the body.

Over the last fiscal year, three new papers were published in high impact scientific journals as a result of the findings. In total, The Prune Study will yield about 10 scientific papers, giving credibility to the messages CPB communicates to health professionals and consumers alike. Among the key findings include a greater understanding of the positive effect of prunes on bone health in postmenopausal women. These benefits are especially relevant today, as the food-as-medicine movement picks up steam and there is a greater understanding of the role foods may play in disease prevention and management.

With osteoporosis impacting more than 10 million people in the U.S. over the age of 50, most of them women, and having no known cure, foods that may benefit bone health have a huge potential to improve overall health. With a group of nearly 200 postmenopausal women, The Prune Study found those who had consumed prunes every day over the span of one year were able to maintain bone mineral density at the hip, offering a protective shield against osteoporosis. This was in comparison to the control group who did not consume prunes and experienced a loss of bone mineral density at the hip, highlighting that consuming prunes may mitigate the deleterious effects of menopause on bone metabolism.

The Prune Study also showcases how inflammation and other factors can influence bone health and is paving the way for a comprehensive understanding of prunes' multifaceted benefits.



Sharing Research Findings Across the Globe

Nutrition research is meant to be shared, and in 2023 CPB supported researchers who collectively participated in seven presentations at four scientific conferences, reaching health and nutrition professionals and spurring conversations with peers to cultivate other research potential.

By using researchers to help tell the nutrition story of prunes to a wider audience, CPB benefits from added credibility and influence. In addition, with each study, the prune industry empowers consumers to make informed choices and moves closer to CPB's vision of creating a world enthusiastic about California Prunes. A sampling of where CPB has shared the health benefits of California Prunes over the last year include:



Government and Issues Management:

CALIFORNIA PRUNE BOARD AT WORK

California Prune growers and handlers are increasingly affected by decisions made by policymakers and agencies at the state and federal level, and the California Prune Board (CPB) ensures the California Prune industry has its voice heard.

CPB staff as well as its partners – including the Torrey Advisory Group – are continually monitoring for threats and opportunities that could negatively or positively impact the industry. They are pounding the pavement to inform officials about issues, policies and programs that impact California Prunes, and are constantly working to secure funding and growth opportunities through the California Department of Food and Agriculture (CDFA), the United States Department of Agriculture (USDA), the Foreign Agriculture Service (FAS) and more. With increasingly high turnover in politics and as the U.S. heads into a major election year, maintaining a constant drumbeat of activity with policymakers has never been more critical to ensuring the California Prune industry can thrive well into the future.

Giving California Prunes a Voice Through Direct Outreach and Active Coalitions



During its annual trip to Washington, D.C., CPB connects elected officials directly with growers who share the story of California Prunes.

CPB has been monitoring updates to the Farm Bill, trade and energy policy, environmental regulations and opportunities around nutrition and food as medicine, among others.

Advocacy on behalf of the California Prune industry occurs via two main strategies: boots on the ground presence on Capitol Hill and participation with other stakeholders through coalitions that can drive the industry's success.

"If you are not there telling your story, others will do it for you," said Michael Torrey, president of Torrey Advisory Group, which serves as the eyes and ears of the California Prune industry in D.C. "And if you are not at the table, opportunities could slip by."

The intersection between politics and policies that impact food and agriculture has never been more complicated, and the volume and velocity of issues require constant prioritization of resources and timing. CPB identifies issues of specific concern to the California Prune industry through the Government and Issues Management Committee and goes to work on Capitol Hill with agencies to educate and voice concerns. Preparing informative materials and compelling messaging is a key part of the strategy.

At the core of CPB's work is developing successful funding proposals and programs to support export markets. The organization strives to foster a strong partnership with FAS and maintains an excellent performance rating each year. During the last year, that performance resulted in approximately \$3 million of Market Access Program (MAP) funding for key export markets, \$335,000 of Emerging Market Program (EMP) funding for market exploratory research and \$436,000 of Technical Assistance for Specialty Crop (TASC) research for continued use of sulfur dioxide in the European Union.

CPB is an active participant in coalitions at the state and federal level where it can leverage the power of multiple parties working together for shared success on issues that affect production and trade. Examples of such coalitions include: United States Agricultural Export Development Council; Dried Fruit Association of California; California Farm Bureau; Minor Crop Farmer Alliance; and the California Specialty Crops Council.

Government Purchases Serve as an Important Market

American families and individuals in need of nutrition support can access food due to a variety of programs facilitated by USDA through food banks, school breakfast and lunch offerings, the Supplemental Nutrition Assistance Program (SNAP) and more. CPB works to maintain positive relationships with the Agricultural Marketing Service and Food and Nutrition Service to provide up-to-date information about industry production and inventory, and advancements in nutrition discovery.

During the last year, these purchases equated to \$4.9 million/1,026 tons, proving to not only be an important market opportunity that has absorbed excess supply, but also, in many instances, has served as children's and adults' first exposure to California Prunes.

Prune Summit 2023



Central to the mission of the California Prune Board (CPB) is the charge to unite growers and packers – and the 2023 Prune Summit did just that with a focus on building an enduring industry for the future.

The summit brought nearly 200 stakeholders together, in person, for the first time in three years. Several notable partners, supporters and representatives from organizations that play a large role in the success of the industry took part in the summit's agenda.

95%
of attendees
expressed
satisfaction
with the 2023
Prune Summit

*Based on 2023 post-summit survey results

Panelists George Sousa, Jr., president, Mariani Packing Co.; Dane Lance, president & CEO, Sunsweet Growers Inc.; and Jaswant Bains, president & CEO, Sacramento Packing, participated in a panel entitled “A Conversation with Industry Leaders,” during which panelists agreed the industry’s focus should remain on maintaining equilibrium in supply and demand.

Future-Proofing the California Prune Industry

Prune Summit 2023 attendees had the opportunity to dive deep into challenges and opportunities facing the industry, including topics such as global economics and the impact on the prune industry; renewable energy; emerging technologies in production and post-harvest research; nutrition research; demand-building strategies; and other hot topics among the industry.

A series of panels were held throughout the day, including a conversation with next-generation leaders in the industry, featuring Matt Bozzo, Nick Cubre, Dave Van Groningen and Natalie Mariani Kling. With a strong focus on adaptation for the future, the panel held discussions on adjusting operations to meet new regulations, embracing innovative technologies, optimizing farming techniques and more. Other notable panels and presentations kept attendees engaged throughout the day, specifically:



- Robert Fox of CoBank hosted a discussion on the current state of the U.S. and global economies and the impacts on the U.S. farm economy.

- A panel moderated by Trudi Hughes, president & CEO, California League of Food Processors, addressed California's renewable energy and decarbonization goals and the impact on the California Prune industry. The panel featured perspectives from Michael Boccadoro, president, West Coast Advisors; Emily Rooney, president, Agricultural Council of California; and California Department of Food and Agriculture Undersecretary Christine Birdsong.



- Assemblymember James Gallagher highlighted the challenges facing California agriculture using his personal experience as part of a prune-growing family in Sutter County.

- As hosts for the day, Registered Dietitian Leslie Bonci and Chef Kat Turner, both California Prune Board partners, kept the energy vibrant and led attendees in a fun and delicious activity, showcasing six unique prune pairings that utilized and highlighted the versatility and nutritional benefits of California Prunes. The exercise woke up the palates of the attendees and left them buzzing with ideas on how to creatively incorporate prunes into more dishes every day.



CPB encourages growers and handlers to get involved to help shape the future of California Prunes, and participation in the Prune Summit is one way to show your support. CPB thanks those who attended and hopes to have even more participation in the future.



Domestic Marketing:

WINNING IN A DIGITAL WORLD

The U.S. continues to be the #1 global destination for California Prunes – and the potential to continue to grow demand here is powerful, as Americans prioritize health, versatility and convenience. At the same time, the ways in which Americans get information is changing. Digital marketing is now an essential tool, and the California Prune Board (CPB) is prioritizing digital communication by creating compelling content and integrating digital-savvy influencers to talk about the ways to increase nutrition and wellness with California Prunes, while positioning the fruit as a premium, delicious product – all while setting up California Prunes to “win” search traffic online and be a trusted authority.

Content that Crosses Borders

CPB’s digital content has legs across the globe, as it is being shared between domestic and global marketing teams, thus effectively getting the most out of dollars invested. In a collaborative effort with CA Grown, grower features and heritage recipes developed by CPB were utilized by global export market teams to tell the story about the people behind California Prunes – ultimately tying back to CPB’s vision of creating a world enthusiastic about California Prunes.

© CA Grown

Influencer Marketing, Chef Collaborations Provide Good ROI

Data shows that 92% of consumers trust recommendations from their favorite social media influencers over traditional advertisements, according to Nielsen. This means consumers are more likely to try a product, recipe or idea if it comes from a social influencer.

Trusted creators can include health professionals, lifestyle experts and professional and home chefs. In 2022, CPB hosted a recipe contest on Instagram with influencer Teri Turner, creator of the food blog “No Crumbs Left,” and invited consumers to share their delicious and nutritious recipes made with California Prunes. The contest was a success, resulting in more than 400 submissions. In 2023, CPB brought the contest back – but, this time, expanded submissions across various social media platforms to broaden the audience reach. The recipe contest continues to be among CPB’s most successful activations to date. Highlights of the influencer program and chef collaborations include:



Teri Turner

Teri Turner – a best-selling cookbook author, blogger and podcaster – partnered with CPB to host and select the winners of the recipe contest, engaging her followers to participate and helping CPB to reach a wider audience.



Cherry Bombe

CPB launched a partnership with the Cherry Bombe Podcast Network in 2022, including features on the #1 baking podcast in North America, “She’s My Cherry Pie.”



Bronwen Wyatt

Bronwen Wyatt of Bayou Saint Cake in New Orleans continues to be a proud ambassador of California Prunes, notably developing recipes utilized throughout CPB’s domestic and international channels.

Influencer Program = More Consumption of California Prunes

43

chef and influencer partnerships

48

original recipes shared highlighting the versatility, flavor, quality and health benefits of California Prunes

6.69

million video views

920K

podcast downloads

Nutrition Research Drives Media Outreach

CPB works year-round to share the health benefits of California Prunes via consumer, lifestyle, health and science news media. CPB's investment in nutrition research provides a pipeline of content that fuels a regular cadence for outreach, with each study fostering an opportunity to tell the California Prunes story. In addition, the Board is continuously looking for ways to break into consumers' routines and tie California Prunes into trends like snacking and the interest in food as medicine. All media relations activities reinforce CPB's key messages and are designed to inspire an important behavior change: eating more California Prunes.

Notable media wins from the last year include:

EatingWell

10 Fruits You Should Eat Every Week, According to a Dietician

REAL SIMPLE

6 Foods and Drinks That Support Bone Health (Besides a Glass of Milk)

redbook

9 Weird Food Pairings That Are Shockingly Good

GOOD HOUSEKEEPING

7 Top Health Benefits of Prunes, According to Registered Dieticians

TODAY

35 New Year's resolutions you can actually stick to in 2023

Eat This, Not That!

10 Healthy(ish) Game Day Recipes Perfect for Football Season

53

earned media placements

794.5

million+ impressions

(potential number of people reading California Prune news)

72%

of total media placements include messaging highlighting the health benefits of prunes

CPB Website Serves as a Hub for Information About California Prunes

CaliforniaPrunes.org serves as the premier, go-to source for online information about California Prunes. The site is filled with information that educates and inspires people to try California Prunes in new ways by engaging consumers, healthcare professionals, foodservice professionals and the industry. The information has been organized according to the relevancy of these audiences for more intuitive navigation. All pages, recipes and pieces of content on the site have been updated with the newest search engine optimization (SEO) technology. Pages are loading faster, traffic is increasing and CPB recipes are coming up more frequently in search engines. In addition, an industry portal has been created to provide easy-to-access reports and updates to industry members. Overall, user experience has improved and those who visit CPB's website have every reason to stay on the site longer and explore all the wonderful things to love about California Prunes.



See what's new on CPB's website

Live and In-Person: Empowering Registered Dietitians and Healthcare Professionals

Registered dietitians (RD) and other healthcare professionals continue to influence consumers' behavior and food choices. By arming them with information about nutrition research on the healthfulness of California Prunes, they, in turn, can serve as ambassadors to consumers.

This year, CPB focused on conferences and events that allowed the Board to reach thousands of healthcare professionals in single settings, including the Academy of Food and Nutrition Conference & Expo (FNCE), North American Menopause Society (NAMS) annual conference and Today's Dietitian Spring Symposium, along with webinars with the Women's Health Dietary Practice Group.

34,617+
Registered Dietitians and
Healthcare Professionals engaged

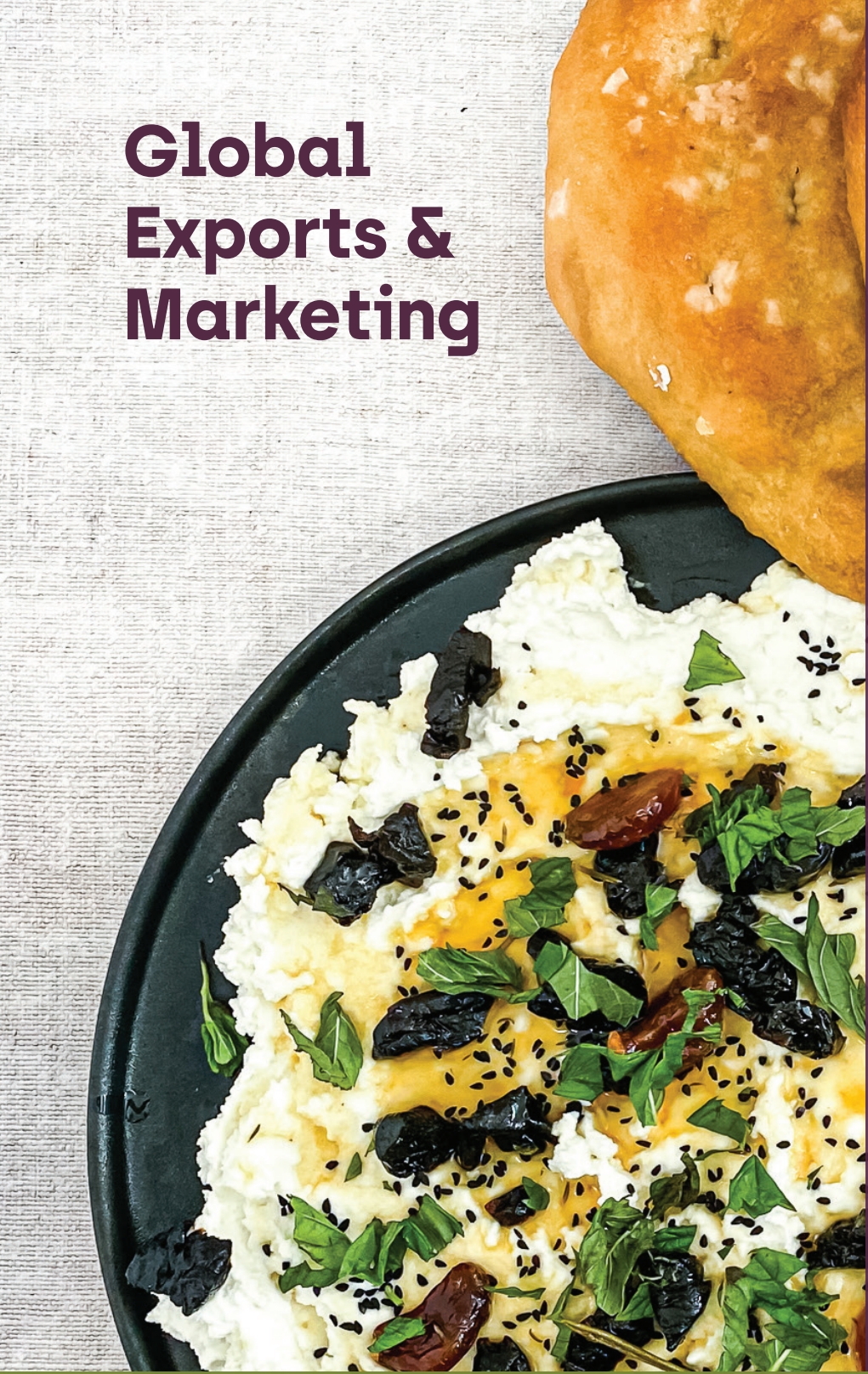


'Prunes. For Life.' Newsletter Engages Healthcare Professionals

CPB delivers the latest research, tips and studies about California Prunes and their role in a healthy diet directly to the inboxes of healthcare professionals. By doing so, CPB encourages them to recommend California Prunes to their patients or clients. The newsletter is received by more than 1,800 subscribers who can affect patient food choices and has a high average open rate of nearly 36%.



Global Exports & Marketing



California Prunes are known and sought after around the globe. In fact, over the past five years, California Prunes have maintained a premium value over prunes from other countries. At the crux of this are efforts led by the California Prune Board (CPB) and others to position California Prunes as the ultimate, premium, sustainably grown product – something that would not be possible without the work of California growers and handlers upholding the quality that has come to be expected from the Golden State.

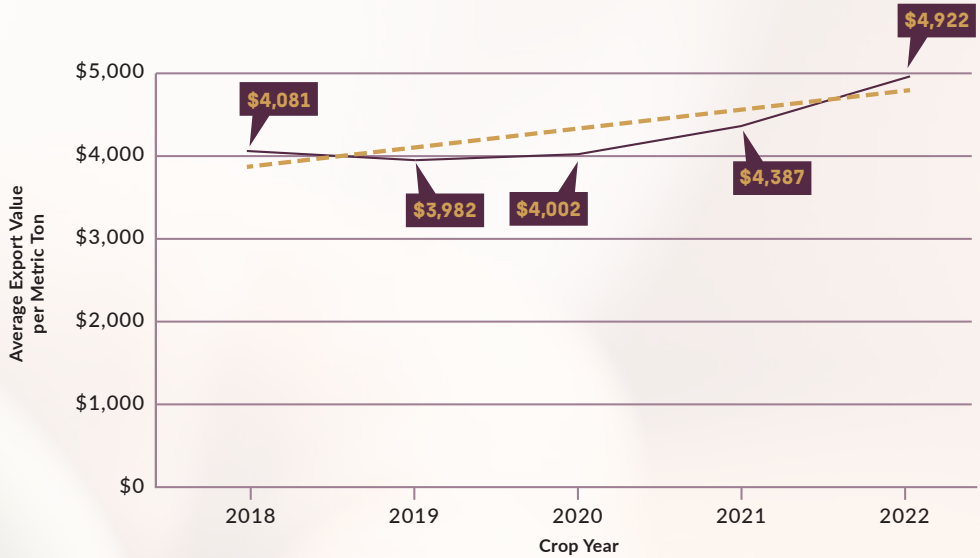
Funding for global marketing is driven by the Market Access Program (MAP) from the United States Department of Agriculture's Foreign Agricultural Service (FAS). The MAP is designed to build commercial support for U.S. agricultural products and commodities, and while MAP reaches nearly every part of the world, CPB chooses to concentrate on markets where it believes it can have the biggest impact.

Supply and Demand

During the last year, the total value of California Prune exports came back in alignment with the average between 2018 and 2020. That said, in 2020, Chile and France faced little-to-no inventory, paving the way for California Prunes to fill the global supply gaps leading to a tight supply in 2022/23. To balance out supply and demand, the California Prune industry has taken a conservative approach to exports, keeping supply for domestic customers to help sustain the long-term success of California's growers and handlers.

California Prune Average Export Value per MT

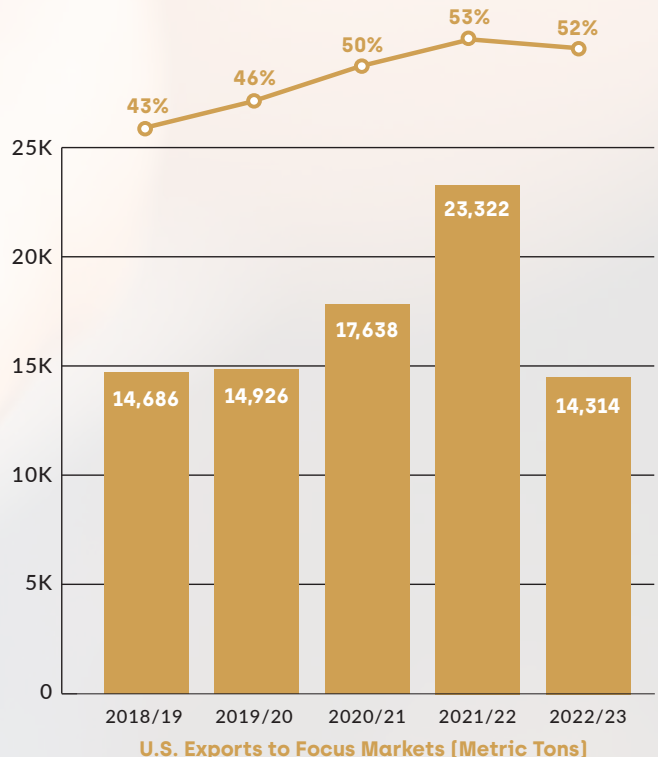
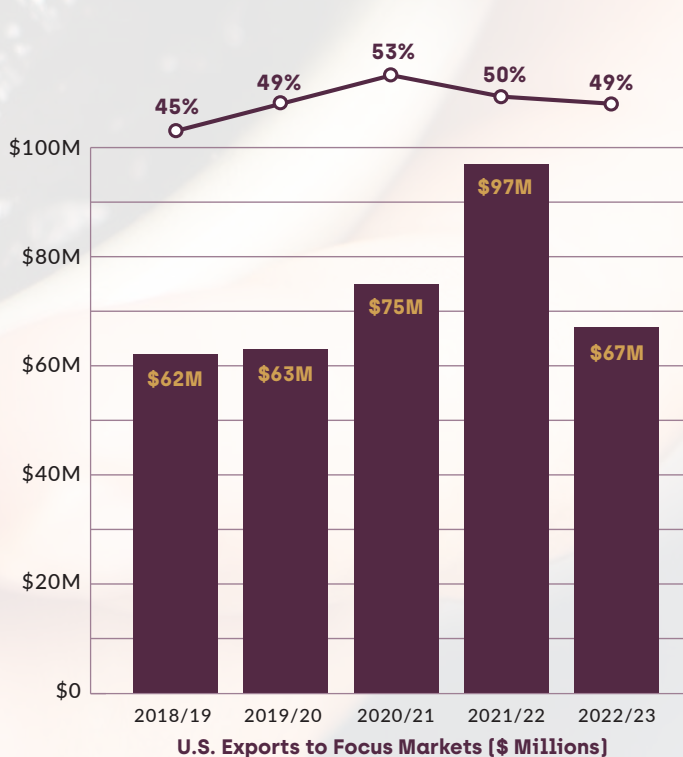
The U.S. average value per MT of global exports has risen by **21%** over the last 5 years



MAP Markets Share of Exports





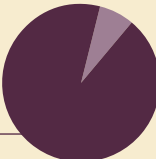

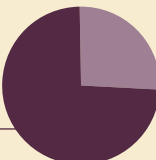

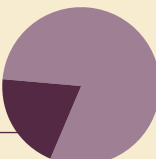





Japan, Canada, Italy, China/Hong Kong and the United Kingdom

The five MAP-focus markets in 2022/23 accounted for **49%** export value and **52%** export volume



A Closer Look at Export Markets

CPB concentrates its global marketing on primary markets (in yellow below) and secondary markets (in purple), with primary markets holding the greatest potential for premium value or overall consumption of California Prunes.

 Market	 Market Share	 U.S. Exports
Japan 	93% 	\$31.2 million
Canada 	74% 	\$15.8 million
Italy 	20% 	\$8.8 million
China/ Hong Kong  	7% 	\$10 million
United Kingdom 	5% 	\$1.4 million

Japan:

Let's Pukatsu

Japan is the largest and most premium export market for both value and volume, and California Prunes have a strong reputation among consumers there, maintaining over 90% market share.

The past year saw the return of face-to-face meetings for this health-conscious country and CPB reignited the trade's enthusiasm for California Prunes with fresh and creative campaigns that highlighted the value of California Prunes, even during a period of high inflation.

A new TV commercial, "Let's Pukatsu" was the foundation to CPB's advertising and marketing efforts in Japan. The newly created Japanese word "Pukatsu" loosely translates as "prune activity" and the campaign's focus was to promote premium California Prunes and a healthy lifestyle by featuring a series of different Japanese consumers during typical daytime scenarios. With "Pukatsu," consumers can enjoy guilt-free daily snacking and support their digestive system and bone health.

"It's time to Pukatsu" was shown on TV and digital platforms last spring, reaching more than 100 million people. The campaign theme was also used on social media, on websites, at point-of-sale in retailers and in healthcare provider activities – creating synergy of messaging across all our targets.

To learn more about CPB activities in Japan:



Morning Activity: "Asa-Katsu" shows our hero character, a young Japanese woman, doing morning yoga with her dog



Bone Health Activity: "Hone-Katsu" shows a couple going surfing and enjoying a prune snack



It's time to Pukatsu: Shows a young family cooking and eating, visualizing the versatility of California Prunes

Canada:

Embracing Digital Marketing to Drive Demand

As the United States' neighbor to the north, it's easy to see how the proximity of this key market provides ample opportunity for the California Prune industry, having few shipping challenges and tariff-free access. Three successive years of strong growth in export volumes make Canada the 3rd largest market for California Prunes in terms of value and 4th for export volume.

Canadian consumers continue to seek healthy foods and snacks, have a growing interest in gut health and are primed for messaging around bone health. Here, California Prunes hold nearly 75% market share. Last year, in this market, CPB furthered relationships in the nutrition community to amplify nutrition research supported by CPB, and utilized digital channels to reach audiences economically and via platforms they are interested in. Specifically, CPB:

- Hosted a webinar in May 2023 with Leslie Bonci, CPB's U.S. nutrition ambassador, for 50 registered dietitians. Topics included the latest scientific research funded by CPB and tips for how to incorporate California Prunes into diet and lifestyle.
- Partnered with The Papaya Podcast – downloaded by 160,000 Canadians – where the host highlighted the health benefits of California Prunes. CPB advertising spots within the podcast also worked as a tool to increase audience reach.
- Capitalized on the growth of vegan and vegetarianism in Canada by working with popular Toronto restaurant PLANTA Queen and hosted a dinner for 17 key media and influencers. The event featured a five-course California Prune-themed dinner, driving top-of-mind awareness and demonstrating the versatility of California Prunes in a vegan/vegetarian diet. Guests of the event shared their experiences to their respective social media platforms, garnering more than 1.1 million impressions.



To learn more about CPB activities in Canada:



Italy:

CPB Targets Consumers From Foodies to Fitness Enthusiasts

Italians are known for their love of food, allocating a high percentage of their income to food products, and demanding the best quality produce – making them a perfect consumer for California Prunes. As the 5th largest export market for value and 6th largest export market in volume, this European country provides an opportunity to emphasize point-of-origin, taste and health messages to consumers.

In May 2023, Italian media and other influencers attended a unique sensory event hosted by California Prunes. In collaboration with mixologist Vincenzo Vitolo – who made two California Prunes cocktails – and perfumer Cristian Calabro, guests were treated to cocktails and an exclusive prune-inspired perfume. The event was designed to appeal to the senses of smell and taste and worked to showcase California Prunes in a fresh way that generated coverage across press, broadcast and social media platforms, reaching more than 5 million consumers.

Younger consumers interested in a healthy lifestyle were engaged via California Prunes collaborations with three world-class Italian athletes who specialize in diving, volleyball and swimming. On the cusp of the 2024 Summer Olympics in Paris and the 2026 Winter Olympics in Milan, interest in sports is especially high in the European Union. The pride Italians have for their athletes, coupled with the athletes' reach on social media platforms, gave CPB the opportunity to engage young audiences around their passions and interests.



To learn more about CPB activities in Italy:



China/Hong Kong:

Gathering Market Intelligence, Targeting the Trade

China/Hong Kong is the 4th largest market in terms of value and 2nd for export volume. Historically, this market has been a home for smaller-sized fruit, but as the category matures, a premium market is developing for California Prunes.

With geopolitical uncertainties on the rise, CPB is pivoting its efforts in China/Hong Kong, focusing primarily on trade intelligence reporting for 2023/24. With this new role, CPB will keep the industry informed on the trading situation, as well as on the growth of the Chinese prune industry.

Prior to activating this intelligence-gathering strategy, advertorials were placed on two digital media platforms, targeting traders in the Chinese food and beverage industry. The advertorials reached more than 1.1 million potential traders or buyers and received more than 260,000 clicks to the website. Additionally, 18 companies have put the California Prunes logo on packaging, further highlighting the quality and safety consumers can expect from California Prunes.



United Kingdom:

Winning with Tariffs, Bone Health

Prunes sold into the U.K. are benefiting from a two-year temporary tariff suspension valid through December 2024 – and CPB is making the most out of this opportunity. To promote California Prunes and the 0% tariff, CPB exhibited at IFE, International Food & Drink Event in London, one of the U.K.'s leading food trade shows. CPB supported the event with samples and collateral in the market, which is the epicenter for essential trade media, whose reach and influence extends to English-speaking trade stakeholders all over the world.

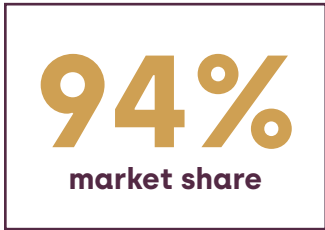


Additionally, the U.K.'s stringent standards around health and nutrition are not only followed globally, but also set the tone for what is coming down the pipeline for other markets. Here, CPB's work continued with the Royal Osteoporosis Society (ROS), which has awarded Bone Health Accreditation to California Prunes, providing added credibility to the bone health research supported by CPB. As a result of the accreditation, California Prunes can now use the bone health logo in marketing, providing clout and recognition for California Prunes in the U.K.

South Korea:

Back in the Game

The South Korean market is a premium export market for California Prunes; currently the 7th largest export market for volume and value with over 94% market share. While CPB activities funded via MAP were temporarily paused here in recent years to allow greater focus on larger global headwinds, California Prunes re-entered the market in 2023 and is preparing for even greater outreach opportunities in 2024.



With a new team on the ground, CPB has invested in market research and re-activation activities, including updates to the website and social media accounts, and translation of a fresh suite of collateral. With a good foundation in place, the team is busy launching activities to the trade, healthcare professionals and consumers with the goal of building current and future demand for California Prunes.

Emerging Markets Program:

Thailand and Mexico

CPB is constantly evaluating markets for new opportunities and in 2019, CPB received funds from FAS under the Emerging Markets Program (EMP) for market assessments in Mexico and Thailand. While initially delayed due to the global pandemic, 2022/23 brought access to new information to enhance the California Prune industry's understanding of the potential in two regions: Thailand and Mexico.

The Thailand market assessment was reviewed by the Export Committee, which determined sufficient information was reported for activation and no continuation needed. The assessment was then shared with processors, allowing them to use the data to inform their business strategy.

The Mexico market assessment was also reviewed by the Export Committee, which expressed interest in a deeper analysis of trade and healthcare professional audiences. Using the original budget allocated to this effort, CPB has implemented outreach activities in 2023 such as trade show attendance, a seminar for healthcare professionals and trade communications. Based on the interest in this market, CPB has applied for further EMP funding in Mexico, and the application for \$415,000 was approved.

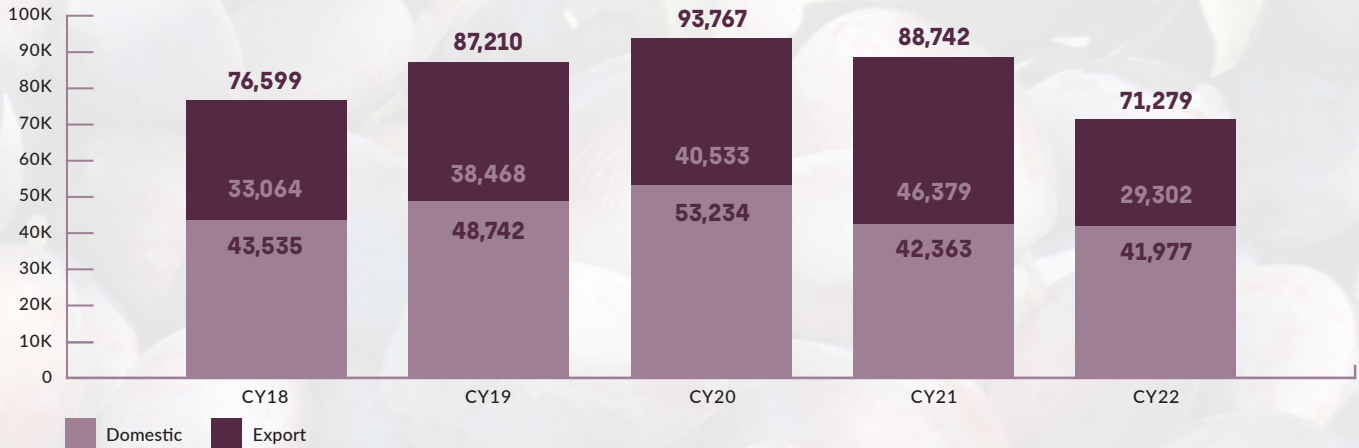
Facts and Figures

The facts and figures provided below are prepared on a crop-year basis spanning August 1, 2022 – July 31, 2023, and include both current and historical information reported in short tons (ST). This statistical content is compiled using data from processors' reports as required by the State Marketing Order.

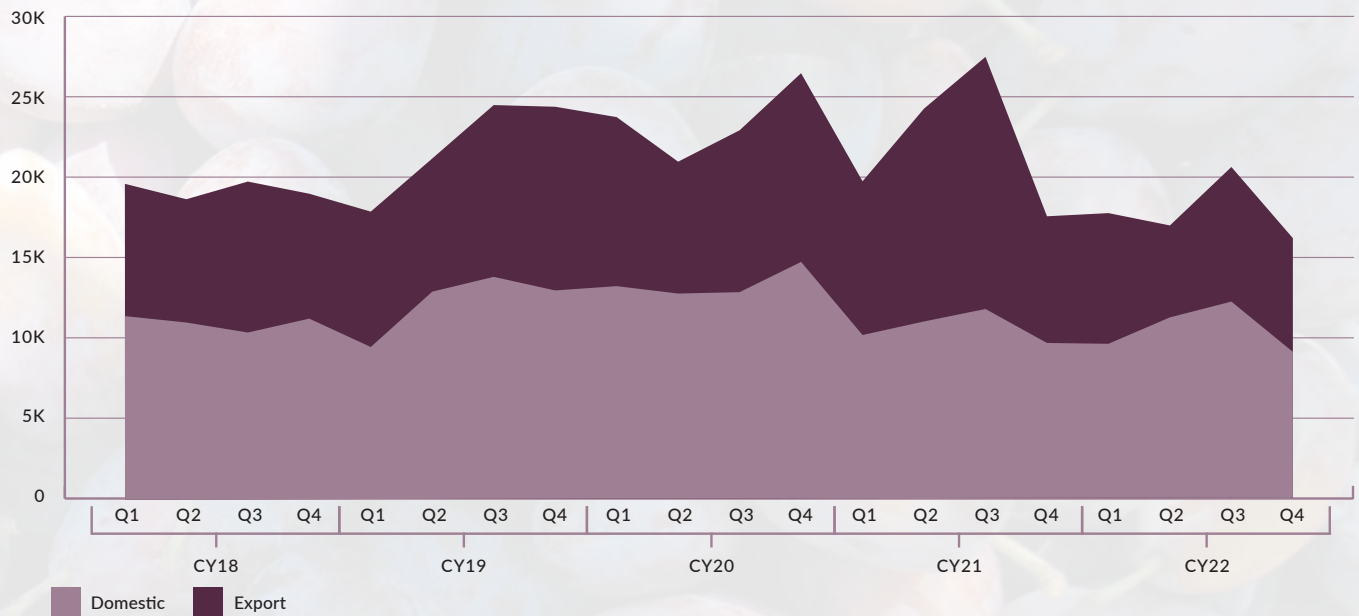
California Prune Supply, Shipments, Beginning and Ending Inventories



California Prune ST Shipments by Year



California Prune ST Shipments by Quarter



Prune Tree Sales

2019	404,153
2020	262,795
2021	229,527
2022	161,567
2023	244,211

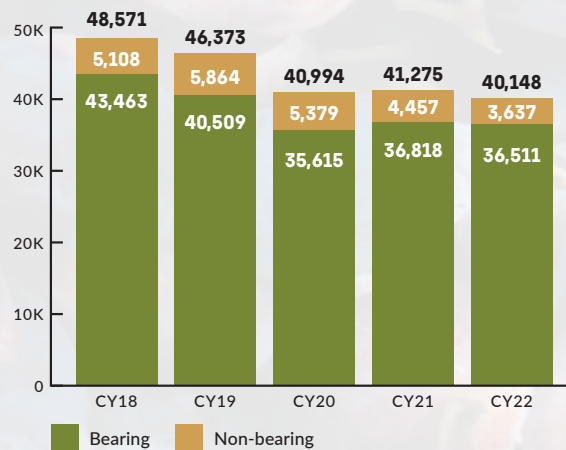
2022 Total Production - 69,491 Short Tons

2023 Carry-In Inventory - 39,908 Short Tons

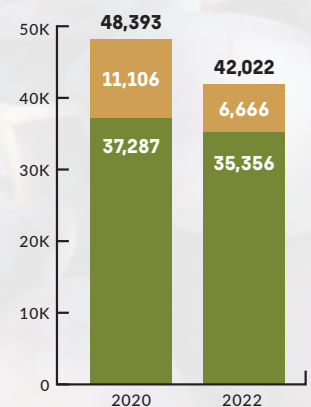
2023 Supply - 114,908 (Board estimate of 75,000 plus carry-in of 39,908)

Total Prune Acreage

(Processors)



(Land IQ)



Resources



Newsletter Sign Up:

- Orchard Notes: Grower-focused newsletter with crop information
- Positively Prunes: Broader industry updates
- Prunes. For Life.: Nutrition-focused newsletter



California Prunes in the News:

- See how prunes are gaining media traction and stay up to date on California Prune Board press releases



Meetings:

- Keep updated on various industry meetings and events



Industry Portal:

- Annual Statistical Reports
- Production Research Reports
- Inventory and Shipment Data
- Exports by Country
- Board Member Information
- Brand Resources & Asset Library

This content is password protected. Contact CPB for password.



University of California, Agriculture and Natural Resources Integrated Pest Management:

- Resource for the year-round IPM program recommended by UC ANR



Fruit and Nut Research & Information Center:

- Database of past prune research reports and resources

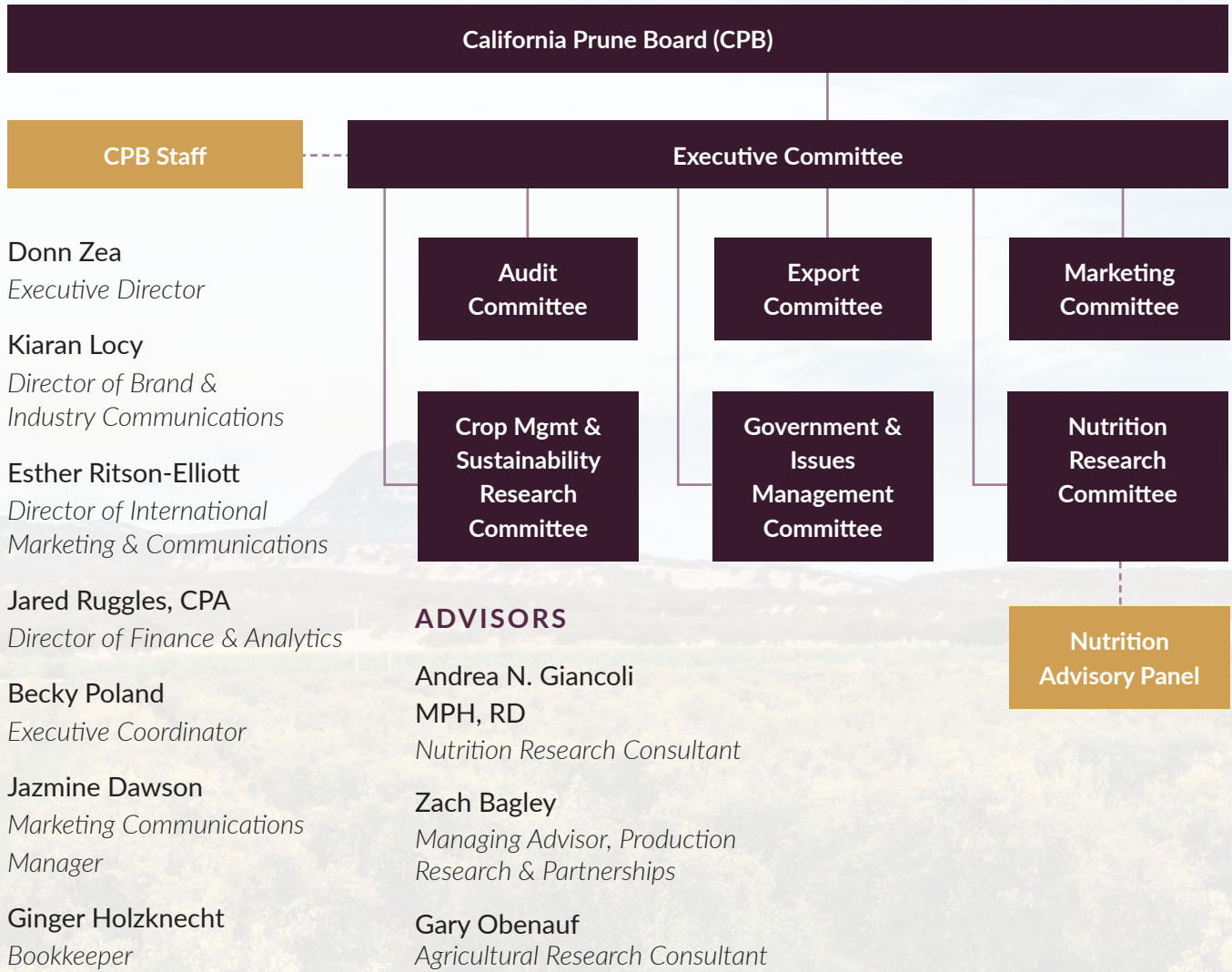
Questions? Connect with Us!

We welcome any feedback or questions you might have about the California Prune Board's (CPB) activities. Sign up for CPB's regularly distributed newsletters and follow the Board on social media for ongoing news, updates and inspiration about the many wonders of California Prunes.



Ensure you're getting all the latest information from CPB staff throughout the year. Learn more.

Board Structure



California Prune Board

3017 Douglas Blvd, Suite 280
 Roseville, CA 95661
 P: 916-749-3442
 Fax: 916-749-3632

www.CaliforniaPrunes.org
contact@californiaprunes.org



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