

BENEFITS OF THE CALIFORNIA STRAWBERRY COMMISSION

2019-2023

CALIFORNIA
STRAWBERRY[®]
COMMISSION





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A MESSAGE FROM THE PRESIDENT

The past five years exemplify the world-class performance of California strawberry farming. The 70,000 people that work every year to grow and deliver strawberries to consumers met record challenges between 2019 through 2023. We faced a global pandemic, import recalls, historic floods, market disruption and run-away inflation with perseverance and innovation.

Despite these challenges, the nature of farming forces us to solve today's challenges and imagine the opportunities that lie ahead. Over these past five years, the industry-elected Board of Directors utilized the California Strawberry Commission to respond to crisis and maintain stable programs in food safety, research, marketing and public policy. In many cases, the metrics for this summary report are a measure of the industry's success.

Demand for California strawberries is stronger than ever, and strawberries are now the largest source of vitamin C from fresh fruit in the American diet. California strawberry farms are always adapting and continue to provide upward mobility, generating the most minority farmers in the country. I am the grandson of a bracero and eternally grateful for the opportunities created by California strawberry farms and the year-round dedication of individuals that propel our industry forward.

As we look to the next five years, we know that mother nature created California's climate as the best in the world to grow strawberries and the government has created the most challenging climate in the world to be a farmer. Sustainability of California strawberry farming remains a cornerstone that we will steadfastly uphold.

Rick Tomlinson
PRESIDENT
CALIFORNIA STRAWBERRY COMMISSION

ABOUT CALIFORNIA STRAWBERRY COMMISSION

California Strawberry Commission (CSC) is comprised of more than 400 strawberry farmers, shippers and processors, all working together to advance strawberry farming for the future of our land and people. CSC creates opportunities for success through groundbreaking programs focused on workforce training, strawberry production research and nutrition research. Through science-based information and education, CSC delivers the good news about sustainable farming practices that benefit the health of people, farms and communities.

Vision

CSC is the unified voice of a sustainable farming community which has the confidence of consumers and policy makers to ensure that California strawberries continue to be America's favorite fruit.



Mission

Unify the California strawberry industry to ensure successful farming operations while inspiring consumers and policy makers to love and sustain California strawberries.

STRATEGIC PILLARS

PUBLIC POLICY:

Serve as the unified voice of the industry in all federal and state legislative and regulatory matters.

GROWER SERVICES:

Provide technical resources and training to increase the success of farming operations.

COMMUNICATIONS:

Continually improve the reputation of the industry, while addressing issues and crises as they arise, and driving positive consumer perceptions and behaviors.

RESEARCH:

Prioritize research that provides scientific solutions to policy issues, builds revenues and reduces costs, and contributes to building industry reputation.

MARKET INSIGHTS:

Create and implement programs that provide meaningful market data, analysis, trends and insights across all industry sectors and consumer segments.

DEMAND FOR STRAWBERRIES: 2019-2023

	2019	2020	2021	2022	2023	RATE*
TOTAL \$ SALES FOR FRESH**	\$2,109,516,266	\$2,535,476,406	\$2,835,031,797	\$2,698,253,483	\$2,670,818,407	6.08%
TOTAL \$ SALES FROZEN (FARM VALUE)	\$206,460,000	\$241,360,000	\$324,765,000	\$277,980,000	\$184,416,000	-2.78%
TOTAL \$ SALES IN ALL MARKETS	\$2,315,976,266	\$2,776,836,406	\$3,159,796,797	\$2,976,233,483	\$2,855,234,407	5.37%

	2019	2020	2021	2022	2023	RATE*
TOTAL LBS. IN ALL MARKETS	2,218,688,774	2,243,815,680	2,234,841,353	2,284,635,242	2,322,000,655	1.14%
TOTAL LBS. FOR FRESH	1,818,548,505	1,892,146,572	1,915,562,025	1,955,256,147	1,978,384,005	2.13%
TOTAL LBS. FOR FROZEN	400,140,269	351,669,108	319,279,328	329,379,095	343,616,650	-3.74%

	2019	2020	2021	2022	2023	RATE*
CA \$ SALES % OF FRESH CA/FL/MX	66.5%	72.8%	67.5%	65.1%	61.3%	-2.03%
CA LBS. AS % OF TOTAL LBS.	72.6%	71.4%	66.8%	66.3%	66.2%	-2.27%
CA LBS. AS % OF TOTAL FRESH LBS.	75.5%	75%	70.4%	69.5%	68.9%	-2.27%
CA LBS. % OF TOTAL FROZEN LBS.	61.5%	56.6%	51.1%	51.8%	54%	-3.22%

PER-CAPITA RETAIL SALES IN U.S.

	2019	2020	2021	2022	2023	RATE*
PER-CAPITA \$ FRESH SALES	\$8.30	\$9.84	\$11.03	\$11.49	\$12.06	9.80%
PER-CAPITA \$ FROZEN SALES	\$0.64	\$0.85	\$0.87	\$0.98	\$1.12	14.84%
PER-CAPITA QUANTITY FRESH & FROZEN	3.01	3.53	3.55	3.58	3.59	4.53%
PER-CAPITA QUANTITY FRESH SALES	2.99	3.51	3.53	3.56	3.58	4.53%
PER-CAPITA QUANTITY FROZEN	0.01	0.02	0.02	0.02	0.02	5.33%

Source: Estimating the Benefits of the California Strawberry Commission 2019-2023, June 2024 Report

*Average annual rate of change.

**Fresh dollar sales represent F.O.B wholesale pricing.

STATISTICS

ON THE CALIFORNIA STRAWBERRY INDUSTRY: 2019-2023

Demand for fresh and frozen strawberries averaged 3.3 billion pounds per year (9 million pounds per day), growing 3.5% annually.

About 1.2 million more pounds of strawberries were sold each day in 2023 than were sold daily in 2019.

Retailers sell an average of \$3.5 billion in fresh strawberries annually (\$9.6 million per day), growing 10.4% per year.

In retail stores, fresh strawberries accounted for 44.5% of all berry dollar sales, 10.3% of fruit aisle sales and 5% of produce department sales.

Consumers purchased an average of 3.4 pounds of fresh strawberries from retailers annually, growing 4.5% per year. They consumed nearly 195 million more pounds in 2023 than they did in 2019.

California supplied 71.6% of all fresh strawberries in the U.S. market, averaging \$2.6 billion per year (\$7 million per day). Imports supplied an average of 22.8% of all fresh strawberries.

Nearly **40,300 acres in California were devoted to growing strawberries** in 2023, 7,300 more than in 2019.

The cost to cultivate and harvest strawberries averaged \$87,000 per acre, or \$15.34 per tray. **The cost per tray rose from \$12.39 in 2019 to \$17.73 in 2023, growing 9.4% per year.** Dollar prices per pound at the retail level rose 5.2% per year.

The U.S. exported \$515 million worth of fresh and frozen strawberries per year, or \$1.4 million per day. **California accounted for 87.7% of the total pounds of fresh strawberries exported by the U.S. each year.**

The health of the strawberry industry improved from 2019 to 2023. Of 176 individual metrics analyzed on the basis of growth rates, except for operating costs, 77% of the metrics exhibited favorable trends for the industry.

ESTIMATING THE BENEFITS

OF THE CALIFORNIA STRAWBERRY COMMISSION: 2019-2023



The CSC's consumer website averaged 480,000 visits per year, or more than 1,300 per day. Utilizing social media platforms, the **CSC generated 15.6 million consumer engagements per year** or 42,600 per day on the topic of strawberries.

The CSC's industry website grew from nearly 490 registered users in 2021 to more than 1,850 in 2023.

Programs to maximize frozen California strawberry sales to government markets resulted in 200 million pounds sold, growing 12.3% per year.

Legislative advocacy programs saved the strawberry industry as much as \$50 million per year on two regulatory issues alone.

Through its partnership with the Cal Poly Strawberry Center, the CSC provided 62 bug vacuum services per year, with improvement in equipment performance averaging 39.2%. **Companies saved a total of \$22.4 million as a result of the bug vacuum program from 2020 through 2023.**

The CSC's efforts to obtain outside funding for research to improve farming operations resulted in more than \$67.8 million from 2019 through 2023, averaging \$13.6 million per year. Funding sources included venture capital and government agencies.

CSC spent less than \$110,000 in assessment dollars per year on promotional programs in Canada and Mexico which **contributed to generating sales of 228.1 million pounds of strawberries per year in those two countries.**

The Ibotta shopper rewards campaign resulted in an average of **over 42 million impressions per year with 51.3% of the buyers purchasing strawberries again** after the campaign ended.

CSC Grower Services offered 607 free training classes over five years, with 1,600 people attending each year. About 77% of the companies in the industry and 89% of the acres of strawberries grown in California were represented in the classes. **Industry members saved more than \$820,000 on training classes over the five-year period.**

Despite inflation and crisis events over the past five years, CSC continually spent at least 76% of assessment dollars on programs and services benefiting the strawberry industry. This was achieved by maintaining a very low overhead rate. Unfortunately, flat budgets and inflation have reduced CSC buying power in 2023 to 83.4% of what it was in 2018.

In February 2024, the California Strawberry Commission retained The Tootelian Company to conduct a study to examine the financial and market benefits members of the California strawberry industry receive for the assessments they pay to the Commission. This study focused on how healthy the strawberry industry was for the time period 2019 through 2023 and what the Commission did during that time for both payers and the industry in general.



GROWER SERVICES

California Strawberry Commission’s (CSC) Grower Services team provides technical resources and training to industry members to increase the success of farming practices.

Benefits Snapshot

GROWER EDUCATION WORKSHOPS

From 2019-2023, 607 workshops were provided with 8,000 people attending, averaging 1,600 attendees per year.

77% of companies encompassing 89% of California strawberry acreage participated. Workshops were provided at no cost to industry members, a savings of over \$260,000 per year.

OPERATIONAL OPTIMIZATION

65 companies used the bug vacuum assessment and retrofit service in 2022 and 2023. The average percent improvement of the equipment was 39% and development of the retrofit kit saved growers an average of \$500 per acre.

Total savings to companies was estimated at \$22.4 million, an average of \$5.6 million per year.

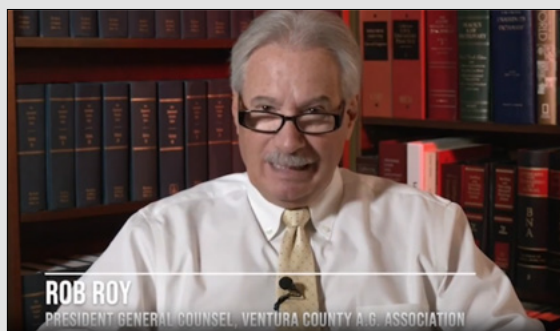
NOTABLE 2023 ACTIVITIES

Resources for New Labor Laws

Hosted **3 webinars** detailing the California Ag Labor Relations Act and associated changes brought on by the passages of AB 2183 and AB 113.

Worked with legal counsel to develop and deliver a bilingual **30-minute training video** for field supervisors on work stoppages.

Developed 1-hour bilingual training video for HR staff to standardize the **Non-Supervisory SHP training** delivered annually to seasonal workers.



CSC webinar featuring guest speaker Rob Roy, President and General Counsel at Ventura County A.G. Association, on new labor laws.



Grower Education Workshops

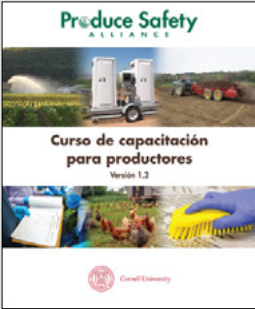
In 2023, the Grower Services team developed and delivered **9 full-day leadership workshops**, focused on building skills to manage and prevent conflict on the ranch, to **462 crew leaders and supervisors** from **69 companies** from all major production districts.

Attendees at the Labor Management and Compliance Leadership Training.

Regulatory Issue Education and Training

CSC hosted **2 FSMA Produce Safety Alliance Grower in-person trainings** in Spanish, with **84 managers from 54 companies** receiving their FSMA Produce Safety Alliance Grower Training Certification. Additionally, CSC Grower Services developed curriculum and received approval from the California Department of Pesticide Regulation as an official T2 Pesticide Safety Training Program, delivering 5 trainings in all growing districts. In 2023, **143 pesticide safety trainers** at **46 companies** completed training.

The Grower Services team also continued to improve relations with the Food & Drug Administration (FDA) by actively pursuing a collaborative approach to addressing food safety concerns surrounding the winter and spring floods and the hepatitis A outbreak caused by imported frozen organic strawberries.



Produce Safety Alliance grower manual used during in-person trainings.



Participants in the T2 Pesticide Safety Training Program.

Operational Optimization

To ensure Spray Rig optimal performance, Grower Services trained crews at **39 companies** to calibrate **110 Spray Rigs**. Also in 2023, an updated Bug Vac was introduced and Grower Services provided new technical resources addressing improved design, operation, maintenance and safety procedures. These materials were provided to industry members and **121 Rigs** were assessed and retrofitted according to the new standards.

CSC Grower Services calibrating a Spray Rig on industry member's farm.

Grower Services team works to optimize Bug Vac according to new specs.

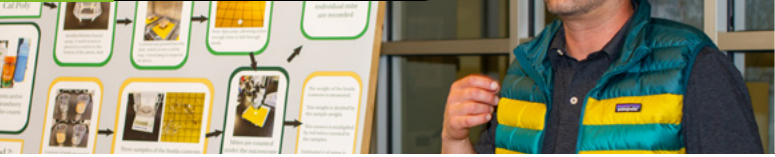


Key Program Results

HANDS-ON EDUCATION:
Hosted 51 in-person training events with **2,540 attendees** and **161 companies** represented.

ONE-ON-ONE SUPPORT:
Provided **141 one-on-one field-based trainings and services** to industry members.

EXTENDED SUPPORT:
Supported multiple **industry trainings and extension meetings**, including UCCE, UC Breeding Field Days, Cal Poly Strawberry Center Field Day, County Ag Commissioners and other industry affiliates.



RESEARCH

California Strawberry Commission's (CSC) Research team prioritizes research that provides scientific solutions to policy issues, builds revenues, reduces costs and contributes to building industry reputation.

Benefits Snapshot

From 2019-2023, the CSC Research team obtained \$67.8 million in funding for research to improve farming operations.

Most of that funding was a result of the commission soliciting venture capital funds for third-party companies working on automation equipment for the strawberry industry.

About \$1.5 million came from collaboration with the Public Policy team to obtain grants from California DPR and USDA-ARS to support strawberry research.

NOTABLE 2023 HIGHLIGHTS



Cal Poly Strawberry Center Partnership

The Cal Poly Strawberry Center, formed as a partnership between CSC and Cal Poly, continues to address growers' needs through research and education in plant pathology, entomology and automation.

Examples of projects coming out of the Strawberry Center include the evaluation of strawberry cultivars and elite breeding lines for disease resistance, the investigation of potential emerging pathogens and abiotic disorders, characterization of the impact of soil temperature and soil moisture on disease development, and the use of UV-C light treatment for managing pests and disease. From the Automation program, further optimization of the Bug Vacuum, the development of a Cross Hole Puncher/Burner and a new laser runner cutting project were prioritized.

Cal Poly graduate student Kiley Jenson, M.S. conducts research in the Entomology lab at the Strawberry Center.



CAL POLY Strawberry Center

STRAWBERRY CENTER RESEARCH IMPACT ON THE INDUSTRY:

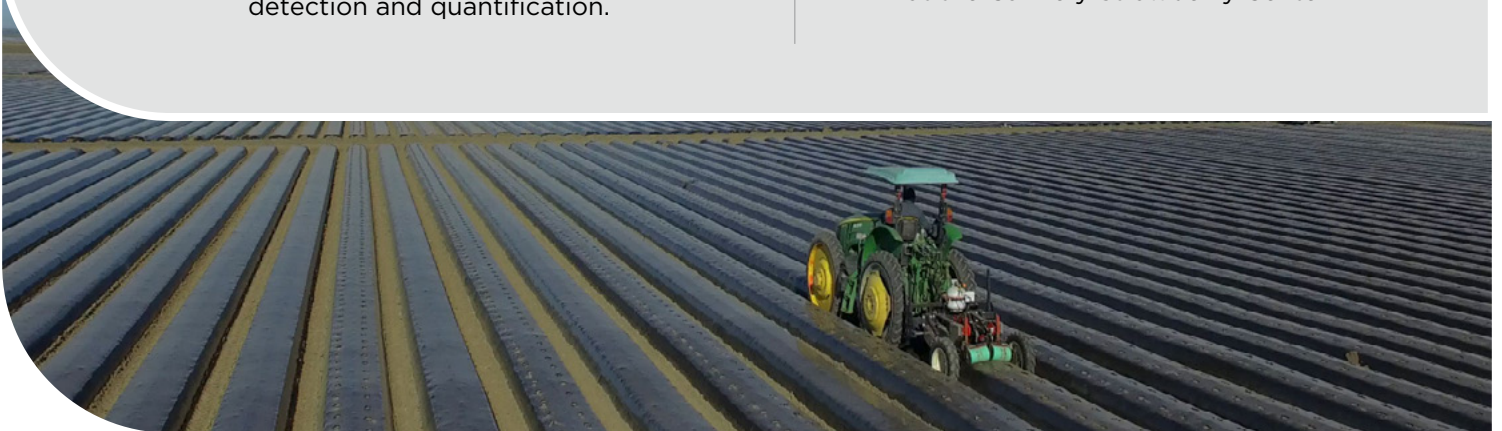
The Cross Hole Puncher/Burner was used to burn holes on **650 acres** of commercial production fields.

Evaluated **63 strawberry genotypes** from **6 breeding programs** against *Macrophomina* crown rot and *Verticillium* wilt through the Pathology program.

CSC provided additional funding for **5 projects** in the entomology program, all focused on improved management of Lygus bug, two spotted spider mites and spotted wing Drosophila.

The Diagnostic Laboratory processed **137 strawberry plant samples** and are expanding to include soil pathogen detection and quantification.

A new entomologist, Dr. Mohammad Aghaee, was hired at the Cal Poly Strawberry Center.



Field Day

Nearly 500 strawberry growers, shippers, processors, researchers and agricultural stakeholders gathered on August 3 for the 7th annual Cal Poly Strawberry Center Field Day, the largest research and education event for the California strawberry industry. The event showcased the latest in innovative strawberry farming technology and research to better combat challenges faced by strawberry growers.

Field Day attendees visit test plots to learn more about the plant pathology research being conducted at the Strawberry Center.



“The Strawberry Center Field Day gives growers the opportunity to see their investments in research in action,” said Allen Davis, chairman of the board at CSC. “It’s exciting to see this partnership between California Strawberry Commission and the Cal Poly Strawberry Center bring together growers, students and researchers to develop more efficient and sustainable tools that are being used today on California strawberry farms.”

PROJECTS PRESENTED AT FIELD DAY 2023

TOPIC	SPEAKER
Susceptibility to <i>Macrophomina</i> root rot and <i>Verticillium</i> wilt in 63 cultivars and advanced breeding lines	Joseph Ramirez (Cal Poly MS Student)
Does wheat cover cropping suppress <i>Macrophomina</i> root rot in strawberry?	Cooper Calvin (Cal Poly MS Student)
Field sanitation	Dr. Shashika Hewavitharana (Plant Pathologist, Cal Poly Strawberry Center) and Peter Henry (USDA ARS Salinas)
Fungicide efficacy against <i>Botrytis</i> fruit rot and powdery mildew	Kyle Blauer (Research Manager, Cal Poly Strawberry Center)
Survey of soilborne pathogens in Santa Maria and Oxnard	Samantha Simard (Cal Poly MS Student)
Effect of planting date on strawberry yield	Samantha Simard (Cal Poly MS Student)
Effects of plastic mulch color and number of drip irrigation lines on incidence of <i>Macrophomina</i> root rot	Colin Koubek (Cal Poly Undergraduate Student)
Infield <i>Lygus</i> bug monitoring for an integrated pest management program	Dr. Abbas Atefi (Senior Production Automation Engineer, CSC)
Optimized 2-row and 4-row spray rig design	Caleb Fink (Production Automation Engineer, CSC)
Hoop house arch removal	Will Kraemer (Production Automation Field Engineer, CSC)
Plastic mulch cross hole puncher	Will Kraemer (Production Automation Field Engineer, CSC)
Autonomous UV-C	Dr. Adam Stager (Founder, TRIC Robotics)
Runner cutter automation	Dr. Mojtaba Ahmadi (Senior Production Automation Engineer, CSC)
Harvest automation	Anshul Porwal (Co-Founder, NeuPeak) and Alex Gutierrez (Founder, L5 Automation, Inc.)
Automated mite counter	Congliang Zhou (PhD Student, University of Florida)
UV-C for arthropod pest management	Jose Alvarado Rojas (Product Development Specialist, Oro Agri)
Predatory mite quality assay summary	Dr. Ryan Perry (Lecturer and Entomologist, Cal Poly Strawberry Center)
Miticide and insecticide resistance	Kiley Jensen (Cal Poly MS Student)

UC Davis Plant Breeding Program

The UC Davis strawberry breeding program investigates key issues in strawberries, including disease resistance, aroma and yield, and leverages those discoveries to develop new varieties of strawberry plants to address the needs of California strawberry growers.



UC DAVIS PLANT BREEDING PROGRAM 2023 IMPACT:

In 2023, UC Davis released **5 new cultivars** - UC Eclipse, UC Monarch, UC Surflin, UC Golden Gate and UC Keystone - available for 2024 planting.

UC Davis was awarded grant funding in 2023 to improve resistance to *Macrophomina*, *Fusarium Wilt Race 2*, *Colletotrichum* and *Neopestalotiopsis*, and to develop genome enabled breeding strategies and resource allocation models to improve breeding efficiency.

Mitchell J Feldmann started as an assistant professor and director-elect of the UC Davis strawberry breeding program in March 2023, ensuring a smooth transition. The transition date is set to September 2024.

New UC Eclipse variety released by UC Davis.

USDA-ARS Partnership

CSC Research and Public Policy departments worked alongside the Strawberry Center and the U.S. Department of Agriculture Research Service (USDA-ARS) to secure \$1 million in federal funding to expand research in strawberry automation leading to sustainable farming practices, including workforce development. The funds from this partnership will be focused on efforts in automation advancements in the field including an automated Runner Cutter and Weed Remover.

Inside one of the research stations where automation advancements are being made in partnership with USDA-ARS.



Key Program Results

UC Davis released **5 new cultivars** - UC Eclipse, UC Monarch, UC Surflin, UC Golden Gate and UC Keystone.

Peter Henry of USDA-ARS developed qPCR and RPA assays to specifically detect the new strain of *Fusarium oxysporum* pv. *fragariae* race 2. Testing of archived samples revealed the presence of Fof race 2 in two fields where it was previously unknown, but confirmed this pathogen is uncommon and only in Oxnard.

Newer technologies like the **Cross Hole Puncher/Burner** and **Strawberry Decapper** are expanding in industry trial and use. Additionally, 60% of the industry has adopted a CSC designed **Bug Vac**.

CSC secured **\$1 million** in federal funding to enhance the automation program.



PUBLIC POLICY

The objective of California Strawberry Commission’s (CSC) Public Policy team is to serve as a unified voice of the industry in all federal and state legislative and regulatory matters. This includes maintaining strong and effective public policy expertise and relationships in Sacramento and Washington, D.C., prioritizing issues that disproportionately affect strawberry farming.

Benefits Snapshot

MAXIMIZING GOVERNMENT PURCHASE OF FROZEN STRAWBERRIES

From 2019-2023, Public Policy worked to increase the purchase of California-only frozen strawberries by federal nutrition programs supported sales of 200 million pounds valued at \$325 million.

The purchases accounted for over 11% of total frozen California sales and improved the annual rate of frozen sales despite a declining market overall.

LEGISLATIVE AND REGULATORY ADVOCACY 2019-2023

In 2022 the California Strawberry Commission (CSC) worked with California Assembly Speaker Robert Rivas to secure a \$1 million dollar grant to be awarded to the Cal Poly Strawberry Center for the purpose of researching methods to combat soilborne diseases that harm strawberry plants.

The Public Policy team also worked with regulatory and trade agencies in Canada to ensure current California strawberry industry on-pack labeling practices would be accepted under new food traceability labeling requirements of the Canadian government, saving the industry an average of \$7.2 million per year from 2019-2023.

NOTABLE 2023 ACTIVITIES

Increase in Total USDA Frozen Strawberry Purchases

In 2023, CSC Public Policy team led an effort that increased USDA frozen strawberry purchases, totaling \$111,000,000, an increase of \$83,245,666 more than 2022. This growth can be attributed to strategic communications with USDA that resulted in numerous purchases for programs such as: 1) a Section 32 Emergency Bonus Buy, 2) Food Banks and 3) a new Native American Program. These purchases bolstered market demand, diminished crop loss and supported market pricing.

Federal Funding for Research Advancements

The Public Policy team worked collaboratively with CSC Research Department and Cal Poly’s Government Relations Director to secure a multi-year \$1 million annual federal funding grant. This funding infusion will help with research efforts focused on automation advancements that are eventually adopted in strawberry farming practices. Moreover, it highlights the industry’s commitment to fostering agricultural innovation and nurturing a skilled workforce for the future.

California Lt. Gov. Eleni Kounalakis toured storm damage to strawberry crop.



Key Policymaker Relationships and Legislative Involvement

ADVOCACY EFFORTS WITH FDA AND GROWER EDUCATION COLLABORATION: CSC’s proactive engagement with key FDA staff in Washington, D.C. facilitated crucial discussions on food safety crisis communication and fostered collaborative relationships with local agency contacts. By initiating meetings with key FDA staff, CSC was able to strengthen ties and develop new communication channels with FDA and Grower Education team to provide vital information to the industry related to food safety.

CONGRESSIONAL COLLABORATION FOR RESEARCH FUNDING: Through concerted efforts with U.S. Congressional members, CSC successfully secured a multi-year, annual million-dollar grant, propelling research initiatives in strawberry automation. This legislative support underscores the California strawberry industry’s pivotal role in driving economic growth and fostering innovation to support automation in strawberry farming production.

PARTNERSHIP WITH U.S. SENATOR ALEX PADILLA: A goal for 2023 was to forge a productive relationship with U.S. Senator Alex Padilla, enabling CSC to leverage legislative opportunities to amplify industry voices and advocate for critical reforms needed due to crisis-related weather disasters. Together with Senator Padilla and his staff, CSC helped ensure USDA relief programs can maintain flexibility and be responsive to the needs of specialty crops during emergency circumstances due to weather.



Peter Navarro testified and presented CSC video at Assembly Joint Informational Meeting.



California strawberry growers and CSC staff attended the Legislative Day at the Capitol and hosted a reception with the theme: Strawberry Farmer Resiliency and Contribution to Communities.

Grant Funding and USDA Purchases Benefiting the Industry

NEW FOOD BANK PROGRAM

Frozen strawberries purchased in the amount of \$18,614,204.40

NEW NATIVE AMERICAN PROGRAM

Frozen strawberries purchased in the amount of \$399,322.56

SECTION 32 BONUS BUY

A critical and timely \$28,135,439.22 was awarded for frozen strawberries during peak season. This USDA purchase helped stabilize market pricing, supply demand and it supported strawberry producers during challenging times.

2023 USDA SCHOOL LUNCH BUY

Frozen strawberries purchased in the amount of \$65,749,158.41

CAL POLY MULTI-YEAR FEDERAL FUNDING GRANT

A \$1 million federal funding grant for Cal Poly Strawberry Center signifies a monumental investment in pioneering research endeavors, for sustainable farming practices and technological advancements in the strawberry industry.

2023 Activities at-a-Glance

40 Advisories sent to industry	14 Farm tours
9 Workshops/webinars presented to industry	3 Storm damage tours
27 Letters sent to legislators and regulatory agencies	71 Legislative/regulatory in-person meetings
7 USDA frozen bid solicitations	34 Sacramento Capitol offices
	16 Washington, D.C.
	21 in District meetings



COMMUNICATIONS

The purpose of California Strawberry Commission’s (CSC) Communications team is to continually improve the reputation of the industry, while addressing issues and crises as they arise, and driving positive consumer perception and behaviors.

Benefits Snapshot

2019-2023 consumer outreach through social media channels generated 77.8 million engagements, averaging 15.6 million per year or 42,600 per day over that time period.

Outreach to health professionals through participation at FNCE 2019-2023 averaged 1,850 annual booth visitors and over 4,000 dietitian toolkits distributed.

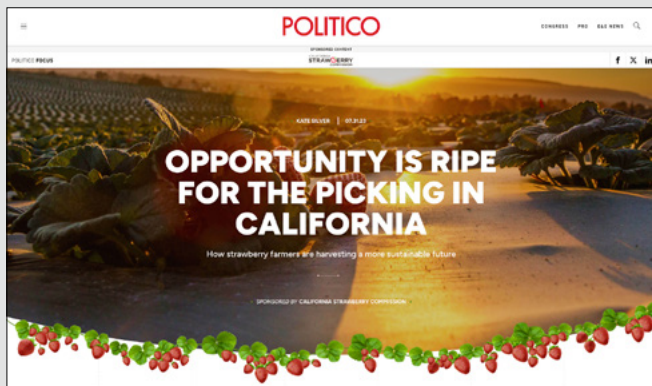
NOTABLE 2023 ACTIVITIES

Spotlighting Innovation and Sustainability

CSC produced *California Strawberries: Growing a Sustainable Future*, a snapshot of the industry’s sustainability efforts focused on environmental stewardship, economic impact and growing communities. The snapshot was promoted through earned and paid media outreach, social media ads and via CSC-owned channels. Key messages from the snapshot drove communications efforts across all key strategies to reach legislators, civic-minded consumers, local California communities, retailers, trade and ag industry members, and health professionals.

The Sustainability Snapshot is available on CaliforniaStrawberries.com.





CSC Board Member Peter Navarro and his brother, John Navarro, were featured in the CSC POLITICO ad campaign.

Crop of Opportunity Digital Media Campaign

The “Crop of Opportunity” digital media campaign combined digital promotion and partnerships with publications including *POLITICO*, *Agri-Pulse*, *CalMatters* and *And Now U Know* to promote personal stories of opportunity through the eyes of farmers and farmworkers. Through strategically targeted ads sent straight to the phones of CSC’s target audience, banner ads with key media outlets and sponsored content, the campaign drove traffic back to CaliforniaStrawberries.com and customized, CSC website landing pages where additional stories of sustainability, economic impact, research and innovation were spotlighted.

CAMPAIGN RESULTS

POLITICO sponsored content and advertising generated **2.6 million ad impressions** and drove **8,800+ pageviews** with an **average time on page of 3:14** (higher than the *POLITICO* benchmark).

60+ digital ads reached **2.3 million people**, receiving **6.7 million engagements** and **5.2 million video views**.

CalMatters 10-week online campaign was viewed **2.7 million** times.

Ads drove **58,000+ website visits** to landing pages on CaliforniaStrawberries.com.

#BehindtheBerry California Strawberries - Influencer Farm Tour

Ten high-profile social media influencers specializing and reporting on topics and issues related to sustainability, agriculture and food/nutrition attended the #BehindTheBerry Farm Tour. This resulted in high-quality, influencer-produced content promoted during the tour and throughout the year. This third-party content helped build credibility around CSC key messages and expanded reach to broader audiences.

Santa Maria farmer, Mayra Paniagua, hosted social media influencers and dietitians at the social media influencer Farm Tour.



FARM TOUR SOCIAL MEDIA RESULTS

200+ social media posts

4.9 million people reached

5.8 million online engagements

5.2 million video views

Promoting Nutrition Research

Three new nutrition research studies were published in 2023, adding to the growing body of research on strawberry health benefits. Studies were promoted through national press releases driving **1,000+ media stories** and nearly **2 billion impressions**. CSC promoted its nutrition research and engaged with dietitians and health professionals at conferences and events throughout the year.

Sweet Science: Eating Strawberries Could Help Prevent Dementia and Depression

Scientists Say Eating Strawberries Could Help Keep Your Brain Sharp

Eating one popular fruit could help reduce your chances of developing dementia, study finds

2 Servings Of Strawberry Per Day Could Improve Heart And Brain Health

Health Professional Outreach

FNCE: In October 2023, CSC exhibited at the Academy of Nutrition and Dietetics Food & Nutrition Conference & Expo (FNCE) held in Denver, CO, reaching **6,500+ registered dietitians**. Ask the Farmer sessions were hosted in the booth, giving health professionals an opportunity to engage with farmers Neil Nagata and Mayra Paniagua on questions about strawberry farming. Social media content from the event received **35,000+ engagements**.

California strawberry farmers Neil Nagata and Mayra Paniagua educated dietitians at FNCE conference.



TODAY'S DIETITIAN SPRING SYMPOSIUM:

Additionally, CSC sponsored and presented nutrition research at Today's Dietitian Spring Symposium, attended by **650+ registered dietitians and health professionals** and through a sponsored webinar attended by nearly **1,500 attendees**.

CSC Communications team brought new nutrition research to share at Today's Dietitian Spring Symposium.

Community Engagement

CALIFORNIA STRAWBERRY FESTIVAL: CSC was the main sponsor of the Ventura County California Strawberry Festival, one of the largest strawberry events in the country. As the main sponsor, CSC messaging and logo appeared on shuttle buses and signage throughout the venue and in social media posts and radio and television advertisements. Hundreds of attendees visited CSC’s booth for numerous giveaways and a social media contest. The booth also provided an opportunity for CSC staff to engage festival participants in providing educational information on the strawberry industry’s sustainability efforts and its positive impact on local communities.

CSC continues to support strawberry growing regional initiatives including Santa Maria Valley Chamber’s Junior CEO program.

JUNIOR CEO: Sponsorship of community events like the Santa Maria Valley Chamber’s Spring Junior CEO session enabled 20 young entrepreneurs to learn the skills needed to launch their own businesses.



CSC was proud to sponsor the California Strawberry Festival at its new location at the Ventura County Fairgrounds.

Key Program Results

MESSAGING RESONATED WITH TARGET AUDIENCE: Key messages reached **39 million people** and drove 479,000+ visits to CaliforniaStrawberries.com.

DIGITAL ADVERTISING SUCCESS: Social media and digital advertising saw a **36% increase in impressions** and **1,000% increase in engagement** over 2022.

MEDIA LOVE FOR STRAWBERRIES: **1,300+ media** stories earned **5.2 billion media impressions**, with 90% of the stories emphasizing strawberry nutrition in top-tier outlets.



MARKET INSIGHTS

California Strawberry Commission's (CSC) Market Insights team creates and implements programs that provide meaningful market data, analysis, trends and insights across all industry sectors and consumer segments.

Benefits Snapshot

Sales of California strawberries to Canada and Mexico from 2019-2023 accounted for 84.6% of total exports and 10% of production.

Over 1.1 billion pounds valued at \$1.7 billion were exported to these countries during that time period, averaging over 228 million pounds valued at \$342 million per year.

Commission promotional programs in Canada and Mexico were funded by USDA Foreign Agricultural Service grants at \$462,168 per year and assessment funds at \$108,225 per year.

NOTABLE 2023 ACTIVITIES

Retail Outreach

CSC conducted retail outreach in 2023, representing the industry as a unified voice to retailers on the crop forecast and important issues that could impact the ability of California strawberry farmers to fulfill retail demand. The industry forecast calls and insights from CSC retail category reports drove retail outreach, which included both retailer meetings and the distribution of a monthly newsletter.

RETAIL OUTREACH HIGHLIGHTS:

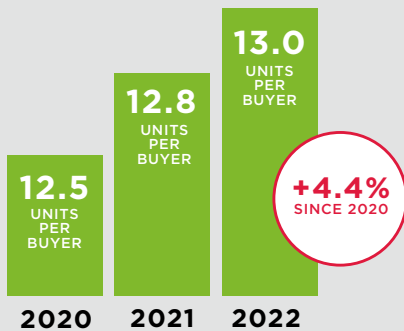
19 industry forecast calls with an average attendance of 19 people representing an average of 12 shipper companies.

42 meetings with the top 15 U.S. supermarket chains and **9 meetings with the top Canadian chains** during peak season.

12 retail newsletters were sent to 233 subscribers resulting in **35.8% average open rate**.

Newsletter **subscriptions increased by 18%** in 2023 over the previous year.

STRAWBERRY PURCHASES PER BUYER ARE RISING



IRI Consumer Network™ 2022

Consumer Insights Survey

To better understand the strawberry industry's reputation and the consumer's mindset, CSC conducted a consumer insights survey in 2023. The survey included insights from both California residents and the broader U.S. consumer to determine if the California consumer climate differed from the national consumer.

KEY CONSUMER INSIGHTS:

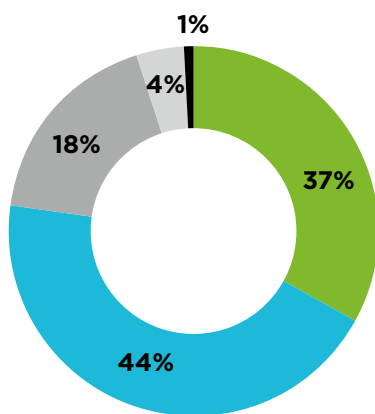
On a national level, the California strawberry industry has a strong reputation and positive perception, with **77% of survey respondents saying they trust the industry**, and this increases for California residents.

California residents are more engaged with the industry, being more knowledgeable, having a more positive opinion of and being more trusting of the industry. They're more likely to purchase California-grown and organic strawberries.

Consumers are most interested in learning more about **strawberry farming practices, sustainability efforts and worker safety**.

Consumer purchases of strawberries are primarily driven by **color, aroma, being organic and being kid friendly**.

TRUST OF CALIFORNIA STRAWBERRY INDUSTRY

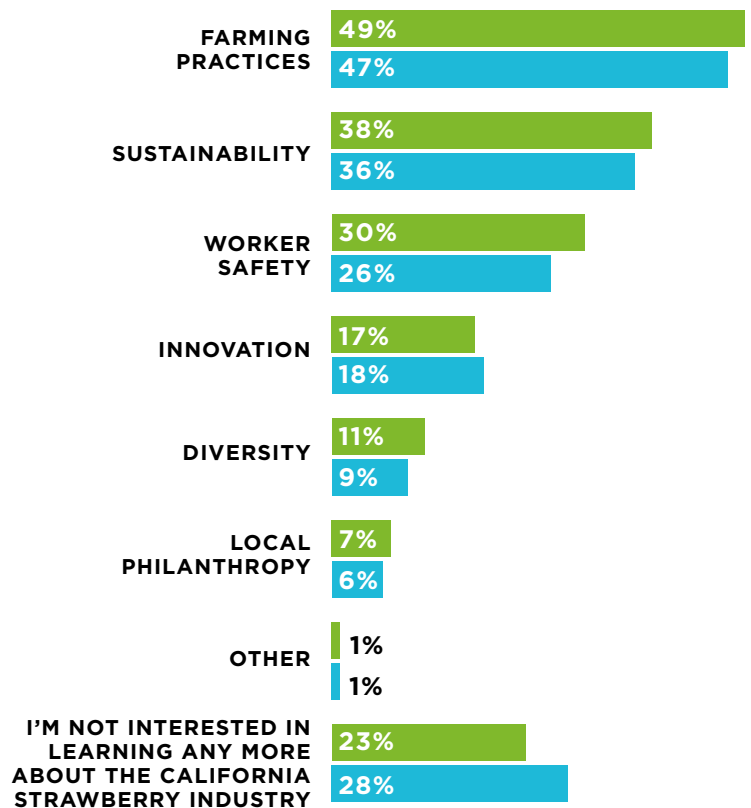


In CA, the top (9-10) trust number increases to

37%

- TRUST (9-10)
- SOMEWHAT TRUST (7-8)
- NEUTRAL (5-6)
- SOMEWHAT DISTRUST (2-4)
- DISTRUST (0-1)

TOP AREAS OF INTEREST FOR LEARNING MORE



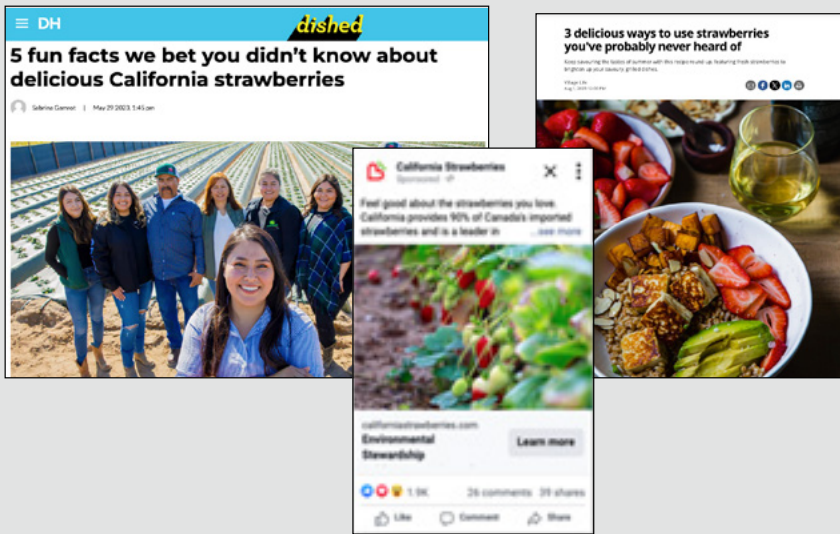
- CA RESIDENTS
- GEN POP

Export Markets

CSC’s Export Marketing program helped maintain the volume and value of fresh and frozen California strawberry exports to Canada and Mexico. These markets combined represent nearly 90% of all California strawberry exports. In 2023, a combined **236 million pounds** of California strawberries, valued at **\$375 million**, were exported to Canada and Mexico, with Mexico exports reaching record levels of **61 million pounds** valued at over \$69 million. USDA-FAS (Foreign Agricultural Services) Market Access Program (MAP) **grants funded 80%** of the 2023 Export Market program.



236 million pounds of California strawberries were exported to Canada and Mexico in 2023



Canada

The Canada program was consumer focused, aimed at increasing engagement and purchase intent for California-grown strawberries through education and promotion, especially during the timeframes of April-June and August-October. The program combined social media and online tactics, such as digital advertising, media relations and influencer engagement, to showcase the nutrition benefits, versatility, convenience and year-round availability of California strawberries.

CANADA PROGRAM RESULTS

More than **51 million impressions**, exceeding goals by 21%

2.5 million engagements, exceeding goals by 209%

31,572 clicks to website, exceeding goals by 24%

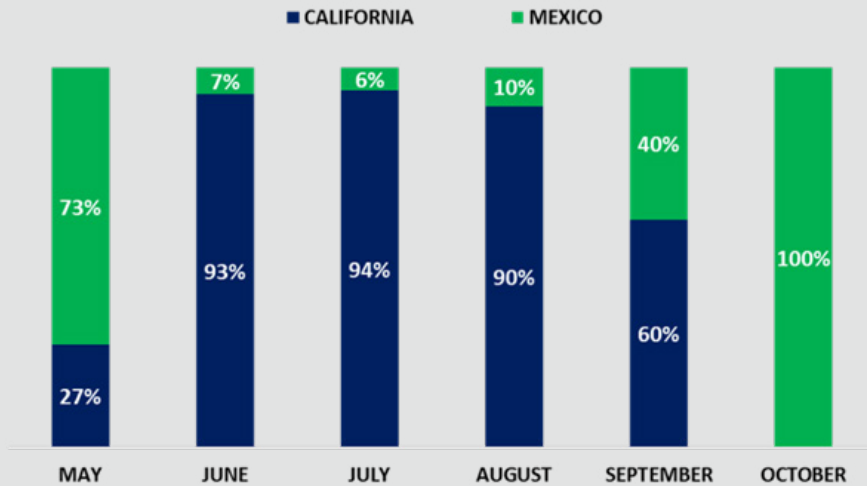
Mexico

The Mexico program is focused on reaching consumers primarily through retail and wholesale trade promotions. The program combined POS and merchandising, trade relations and consumer communications to help drive sales of California strawberries.

MEXICO PROGRAM RESULTS

In-store promotions were held in **15 cities** across **8 retail chains** and **196 stores**.

Promotions saw an **average sales increase of 249%**.



Fresh strawberry market share by origin during peak California season when merchandising and in-store promotions are running.



CSC worked with our team in Mexico to implement in-store promotions in 15 cities in the highlighted regions of Mexico.





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