



A California Perspective on the Next Phase of the Global Prune Industry

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California prune grower and Board Member of the California Prune Board

A Grower's Perspective

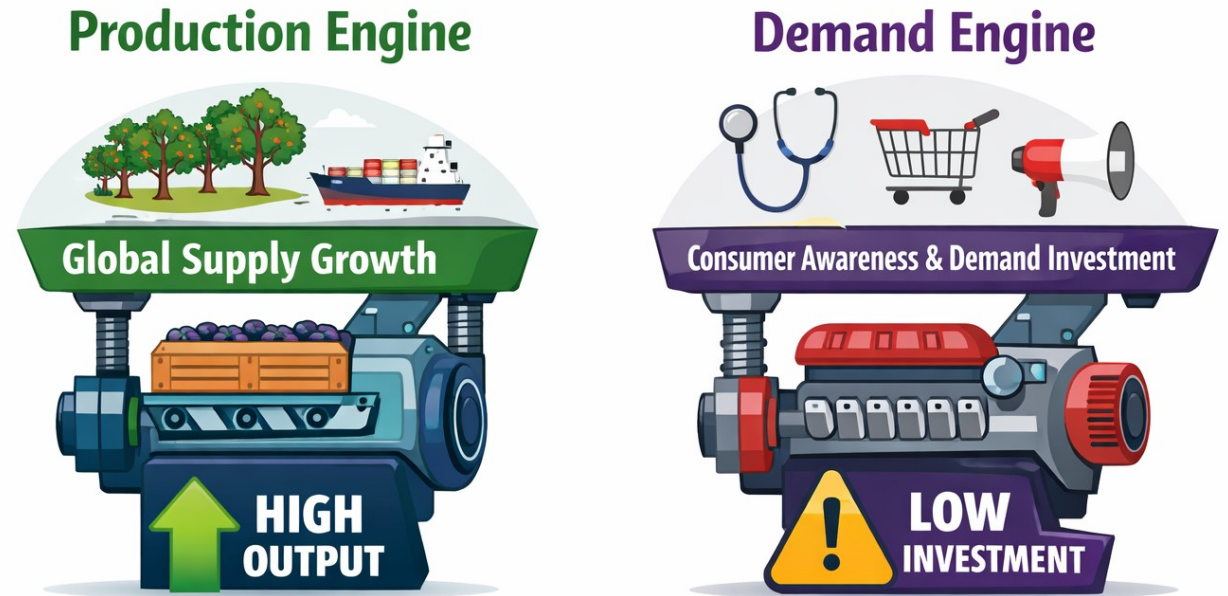
- Multi-generational California prune grower
- Board Member, California Prune Board
- Chair, Nutrition Research Committee



The Global Shift

Supply is Easy. Demand in Hard.

- California: historical leader in quality, innovation, and category-building
- Chile: largest global volume producer and exporter
- New entrants increasing global supply



Sustainable growth requires both engines.

What Happens When Supply Outpaces Demand?

- Global supply expanding
- Marketing investment not expanding at same rate
- Risk: commoditization and erosion of value



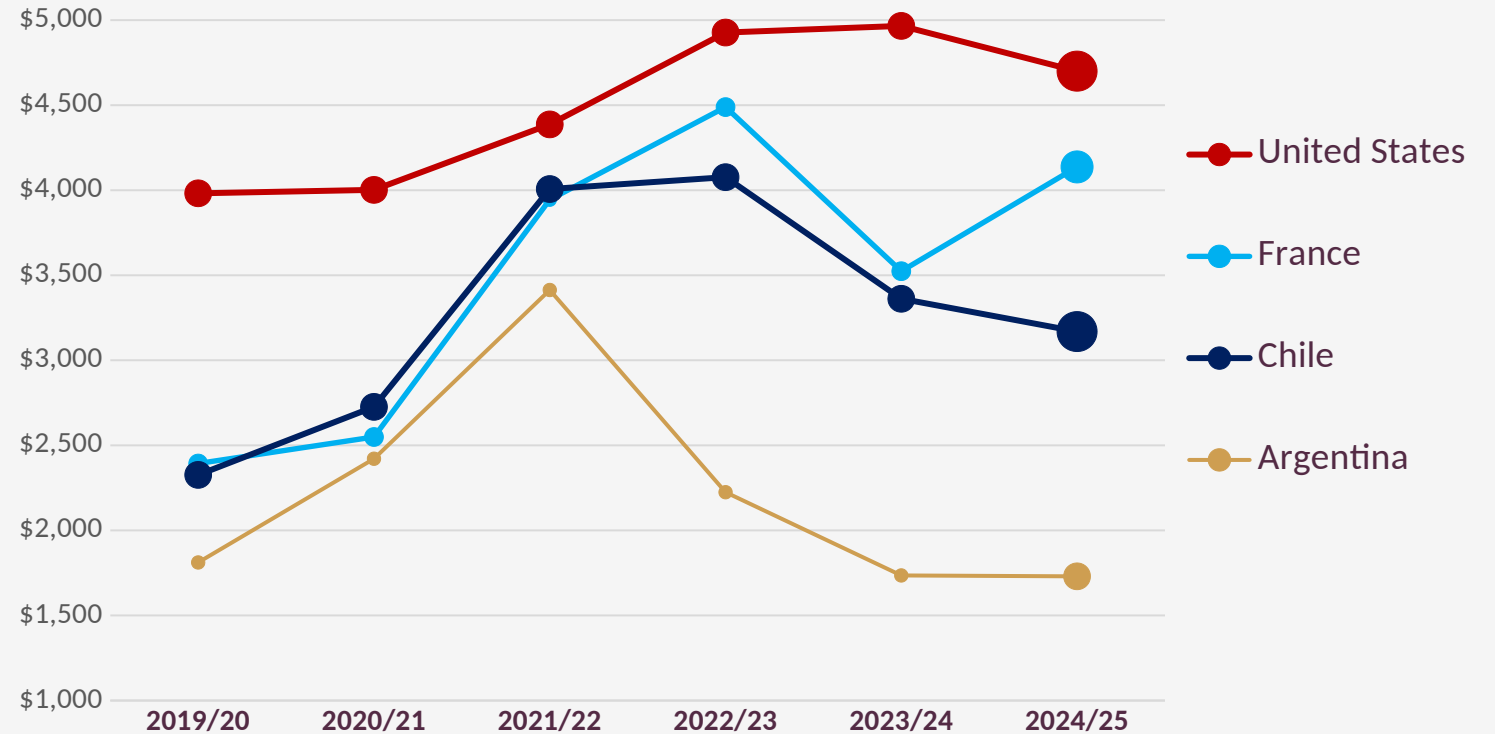
Volume vs. Value

Competing on Volume is Short-Term

Competing on Value is Sustainable

- Share of stomach is competitive
- Consumers choose relevance
- Differentiation protects growers

Value Per MT: trended over 5 years



Source: FAS/TDM EXPORTS.

California's Model: Collective Investment

Overview of the Marketing Order

- Grower & handler funded
- Grower & handler governed
- Transparent, accountable
- 5-year referendum support



california[®]
prunes

Prunes. For life.

Benefits

- Production research
- Nutrition research
- Global marketing
- Policy advocacy

California Prune Board Structure

California Department of Food & Agriculture (CDFA)

California Prune Board (CPB)

CPB Staff + Advisors

Executive Committee

Donn Zea
Executive Director

Audit Committee

Export Committee

Marketing Committee

Crop Mgmt &
Sustainability
Research
Committee

Government &
Issues
Management
Committee

Nutrition Research
Committee

Strategic Pillar: Production Research

- Orchard health & long-term productivity
- Innovation to manage cost pressures
- Climate and biological resilience



Strategic Pillar: Nutrition Research

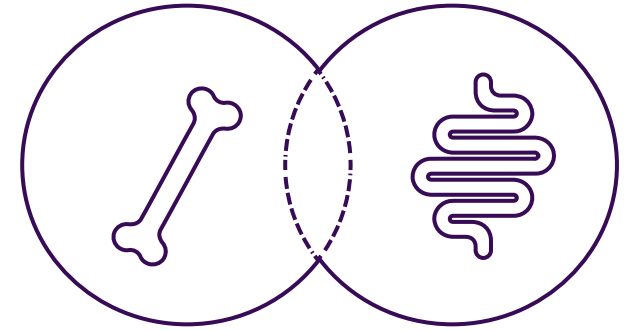
Our License to Play

California Prune Research Portfolio:

- 70+ published, peer-reviewed scientific studies examining prune nutrition and health benefits
- 30 years of investment
- Guided by Nutrition Advisory Panel



Nutrition Research Investment



Strongest Evidence: Bone Health

Clinical trials show

- Maintains bone mineral density over 6-12 months
- Reduces bone breakdown markers
- Benefits may persist over time

Gut-Bone Axis: A Modern Mechanism

- Reduced inflammatory signaling
- Positive microbiome shifts
- Linked to beneficial gut bacteria

Emerging Areas Beyond Bone Health

Microbiome

Gastrointestinal Lining

Leaky Gut

Inflammation

Metabolic Disease

Science Alone Does Not Build Demand



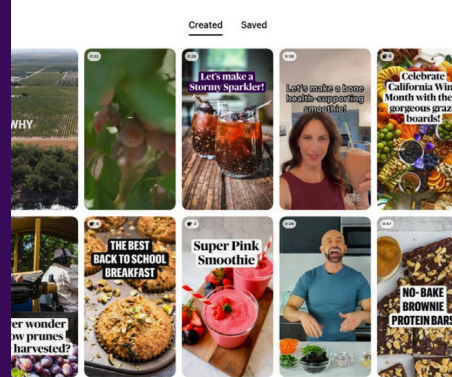
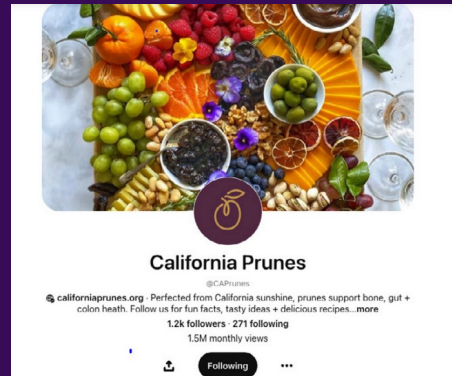
RESEARCH CREATES
CREDIBILITY

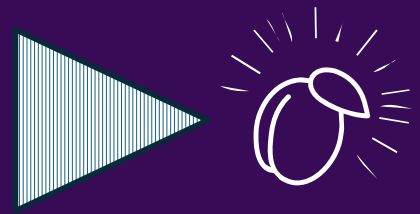
COMMUNICATION
CREATES
AWARENESS

INVESTMENT BUILDS
CATEGORY GROWTH

Global Marketing & Promot

- Driving demand and reinforcing value
- Strong Domestic Market
- Export Market Development





Trade Follows the Consumer



Trade responds to pull

Consumer demand requires:

Consistency

Credibility

Long-term investment



Talking to Consumers

- Identify target audience - all markets are different
- Understand motivations
- What are barriers?
- Opportunities to purchasing prunes

Collaboration or Competition?

- Each producing country has responsibility to build demand
- Collaboration platforms exist
- Example: International Prune Association



IPA

International
Prune Association

Greatest Risk & Greatest Opportunity

Risk

- Oversupply without demand growth
- Commoditization
- Quality erosion



Opportunity

- Strategic investment
- Differentiation through science
- Expanding the global prune consumer base



Volume leadership is one phase – Value leadership is the next



Contribution can take many forms:

Funding

Research

Market
developme
nt

Collaboratio
n

Leadership by
Contribution



Thank you.