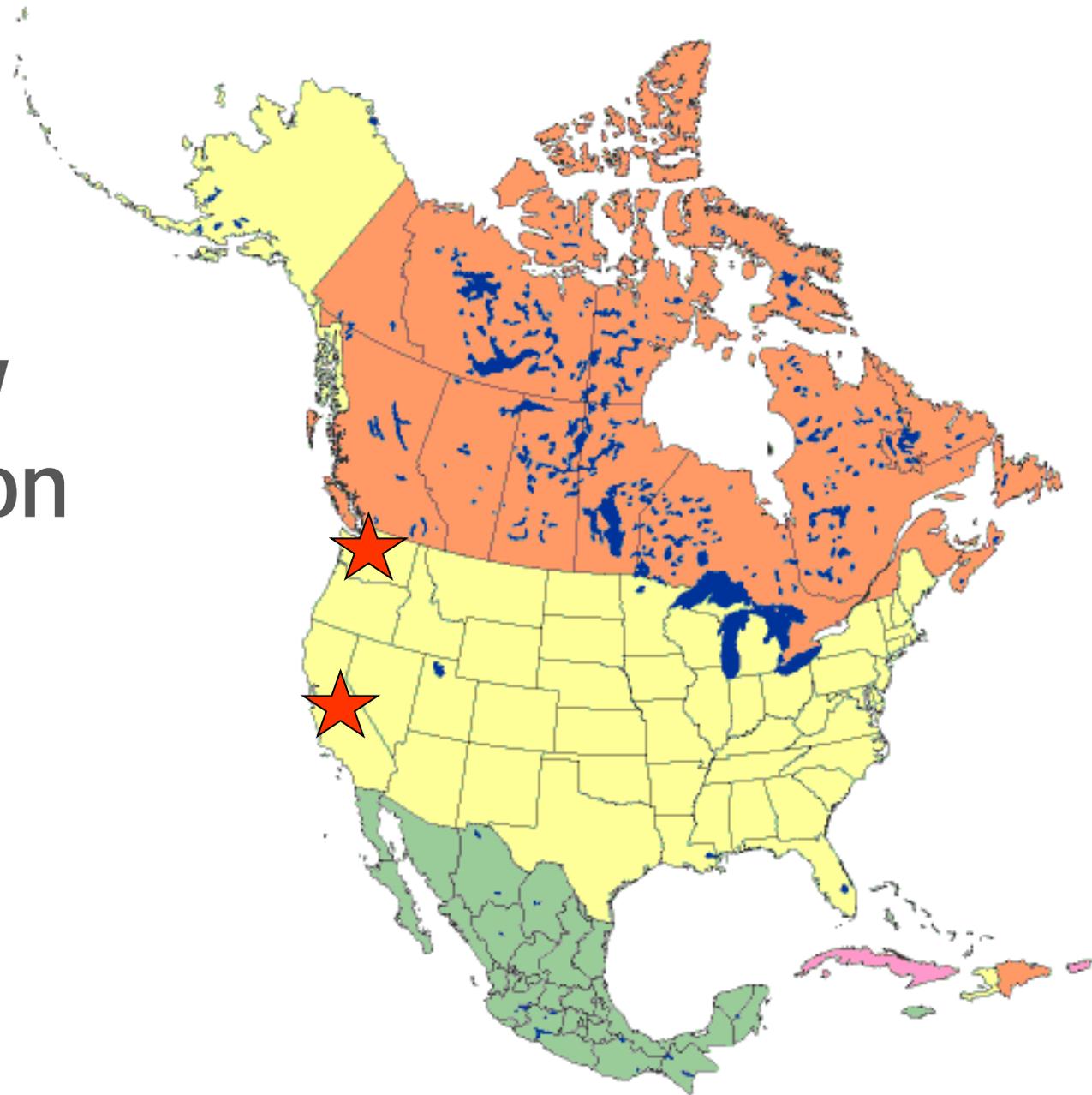


WASHINGTON Red. 
Raspberries

USA Raspberry Industry: Trends



Primary Production Areas



2011 US Raspberry Production

metric tonnes

Washington (<i>frozen</i>)	32,786
California (<i>fresh</i>)	44,000
Oregon (<i>frozen</i>)	2,269
All Other (<i>fresh</i>)	<u>1,000</u>
USA TOTAL	73,238

metric tonnes = 2,204.6 pounds

Growing Regions

Processed Market



- Whatcom County
 - July – Mid August
 - 66 mil *lbs*/30,000 *mt*
- Skagit/Snohomish
 - Late June – Mid August
 - 2.2 mil *lbs*/1,000 *mt*
- SW Washington
 - Mid June - August
 - 3.4 mil *lbs*/1,545 *mt*
- Oregon
 - Mid June - August
 - 5.0 mil *lbs*/2,272 *mt*

Machine Harvest



The Northwest is unique...

99% of raspberries going into the processed market are machine harvested.



Plantings are set up for machine harvest

- Majority of raspberries are planted on raised beds
- 10 foot row spacing with a side wire trellising system
- One machine picks 20-25 acres
- 2-3 day picking rotations (depending on variety)



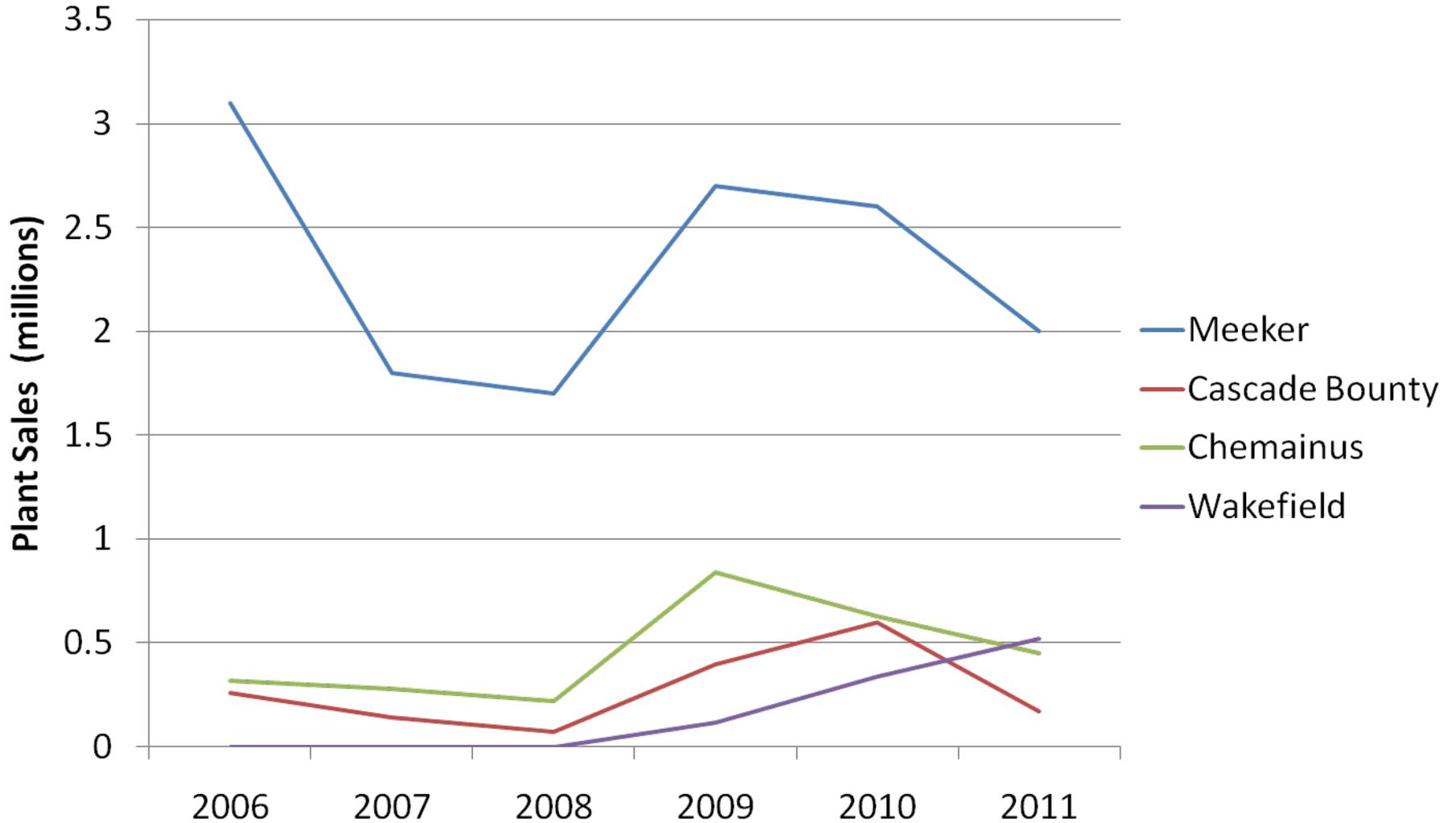
Trends and Projections

Major Processing Cultivars

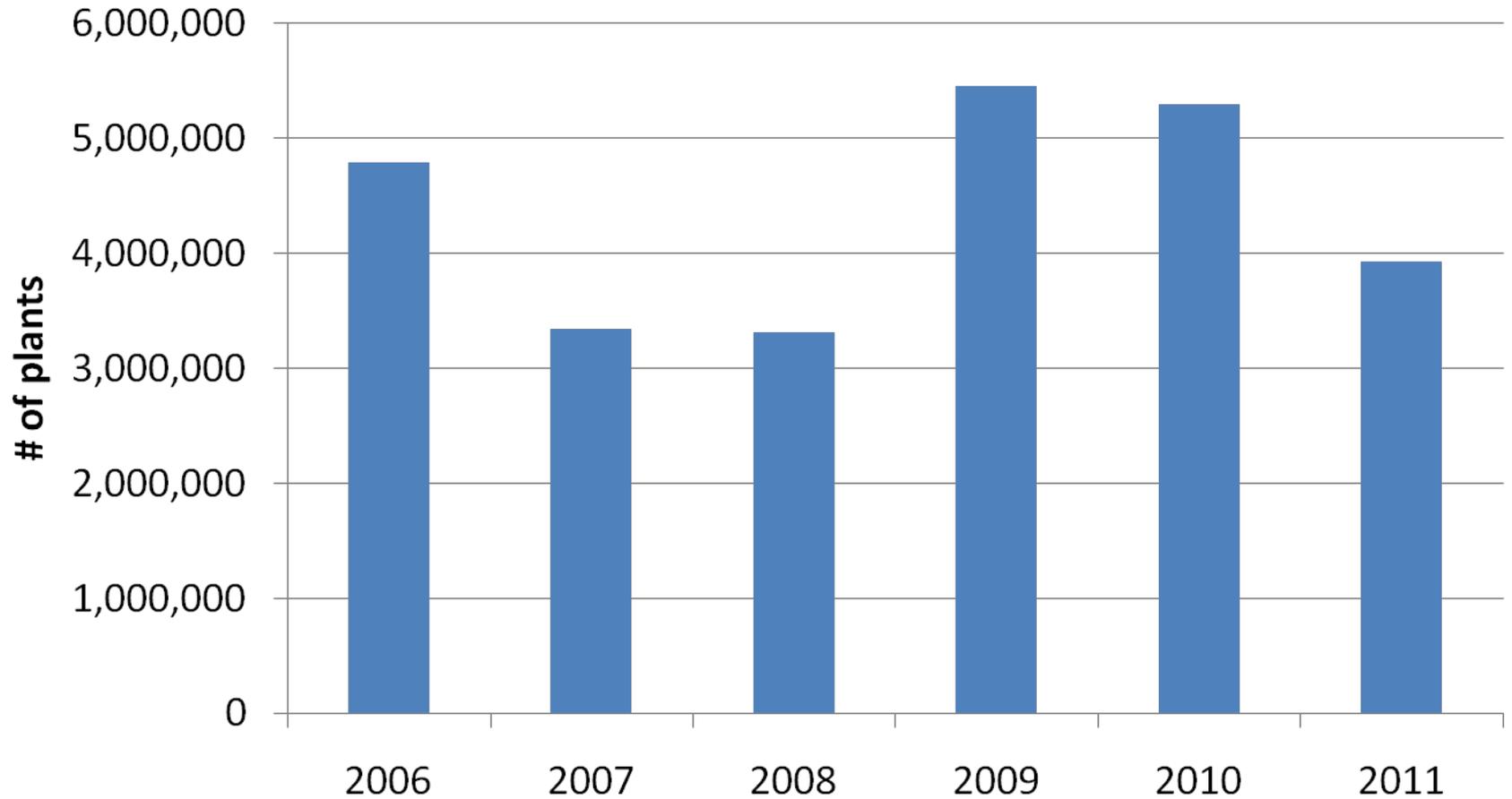
(based on 2011 plant sales in PNW)

Meeker	51%
Wakefield	13%
Chemainus	11%
Cascade Bounty	4.5%
Saanich	4.2%
Willamette	0%
Nootka	0%

Plant Sale Trend by Variety



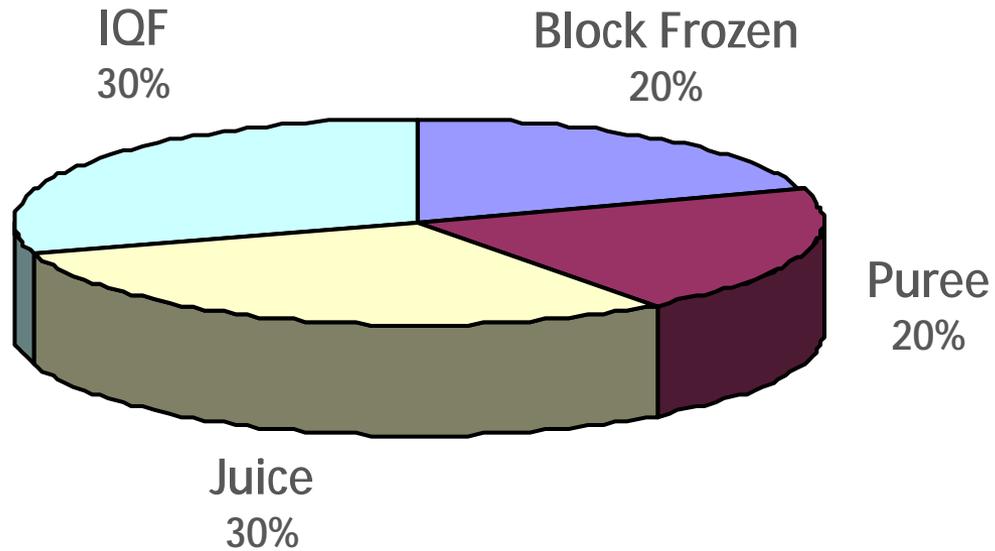
Total Raspberry Plant Sales



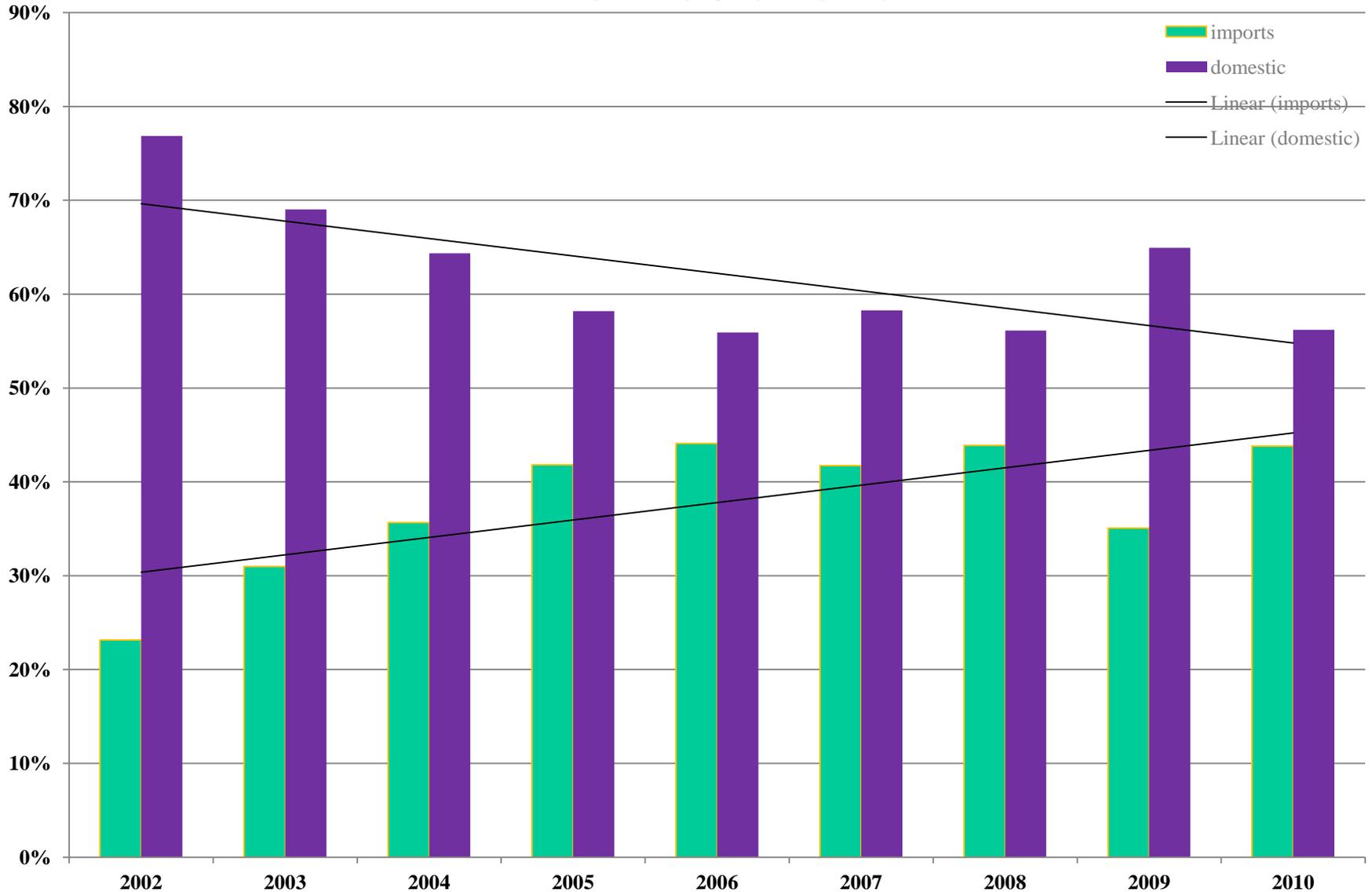
Processing



U.S. Processed Raspberry Production

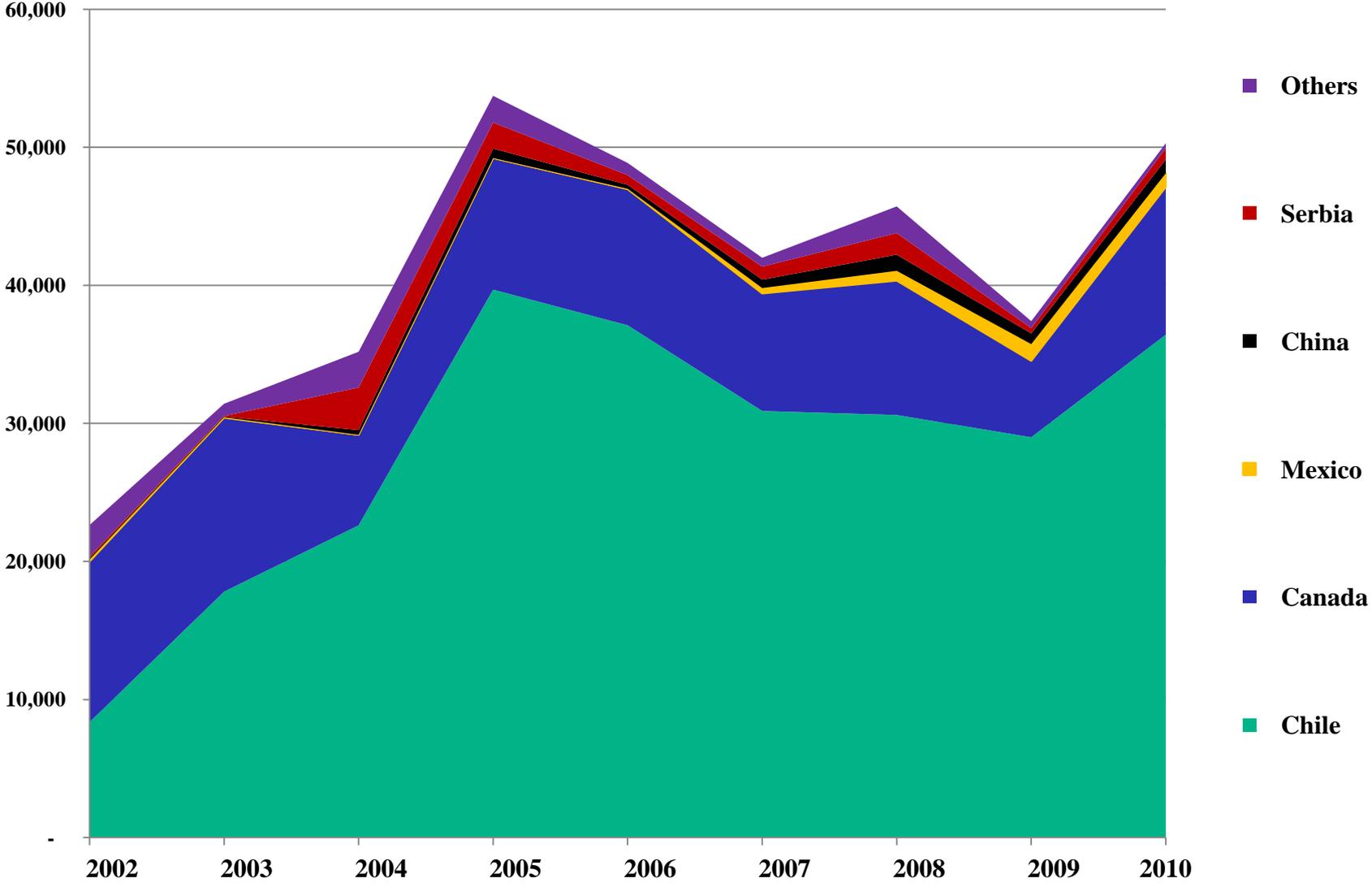


U.S. Processed Red Raspberry Market Share

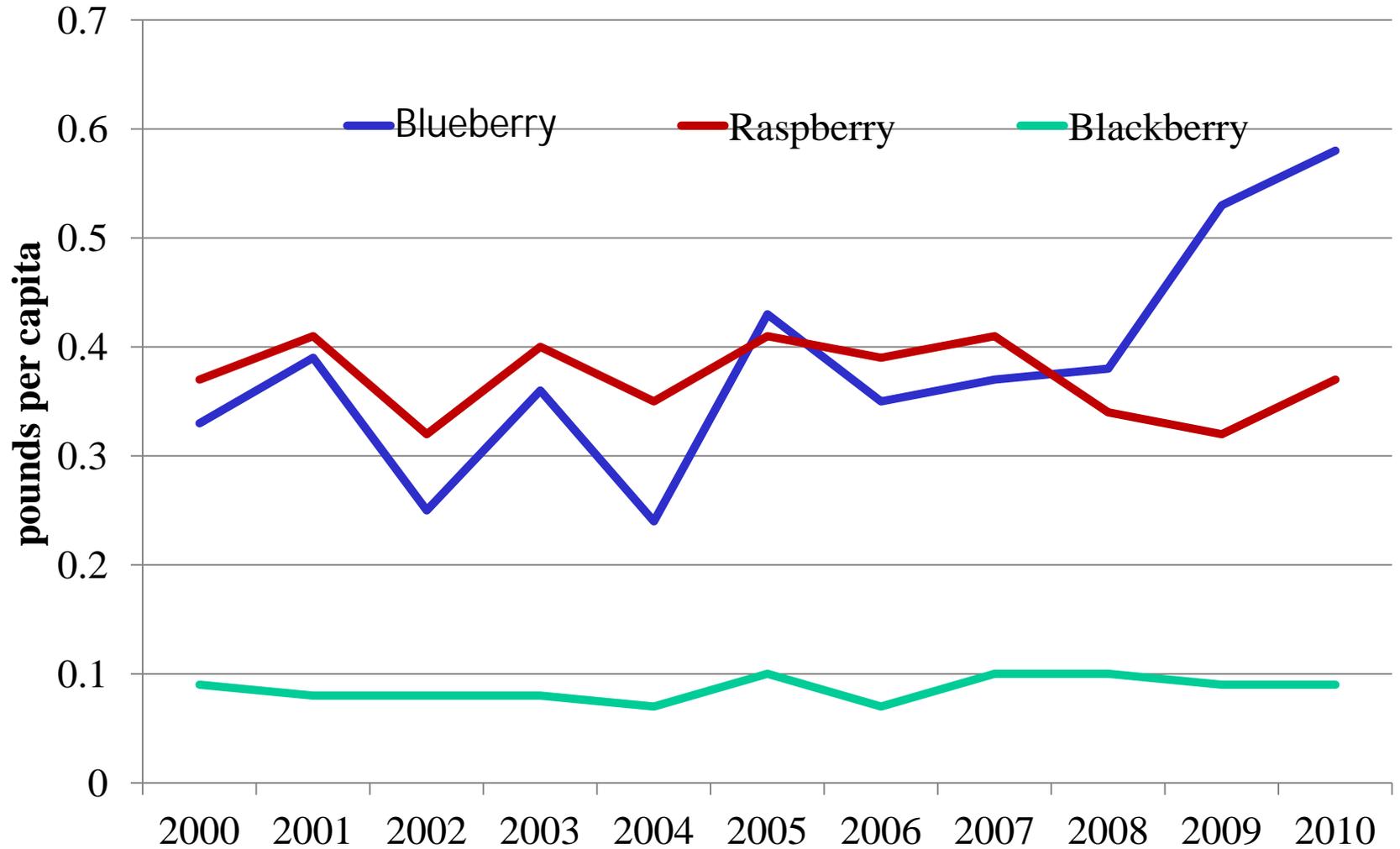


Frozen Raspberry Imports

1,000 lb's



US Frozen Berry Consumption





Main Fresh Raspberry Growing Areas



California Fresh Raspberry Production

- Roughly 2,000 acres are planted for fresh market each year
- 75 fresh market growers in the state (estimate)
- Top Varieties
 1. Driscoll's proprietary varieties
 2. Plant Sciences proprietary varieties
 3. NaturRipe proprietary varieties
 4. Public Varieties (very little)

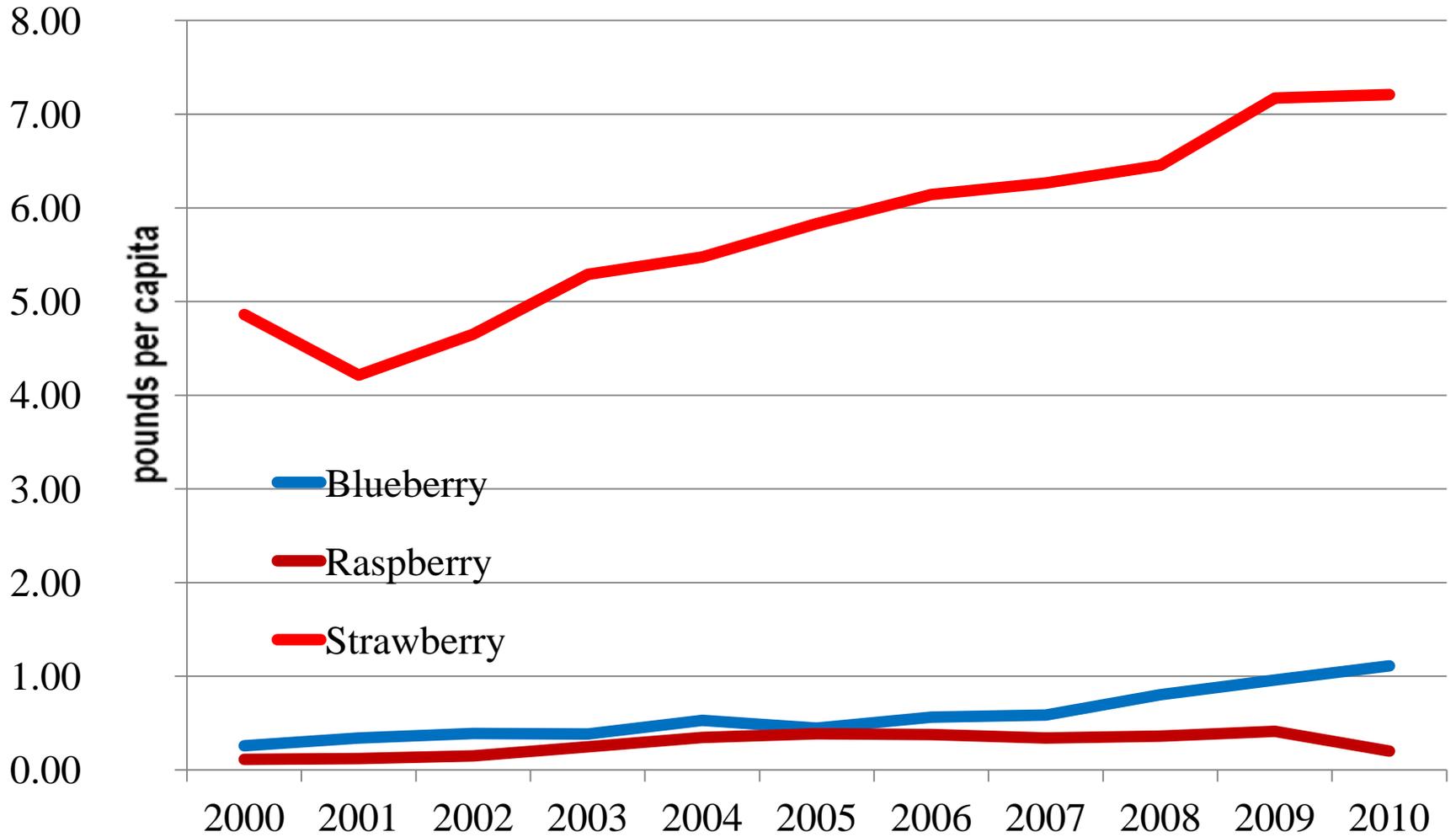


California Fresh Raspberry Production

- Commercial plantings usually stay in ground for 2 – 3 years, usually achieving between 2 – 4 harvest cycles
- Average price to grower over past few years is \$2.25/lb.
- 5% – 10% of fresh production ends up in processed market

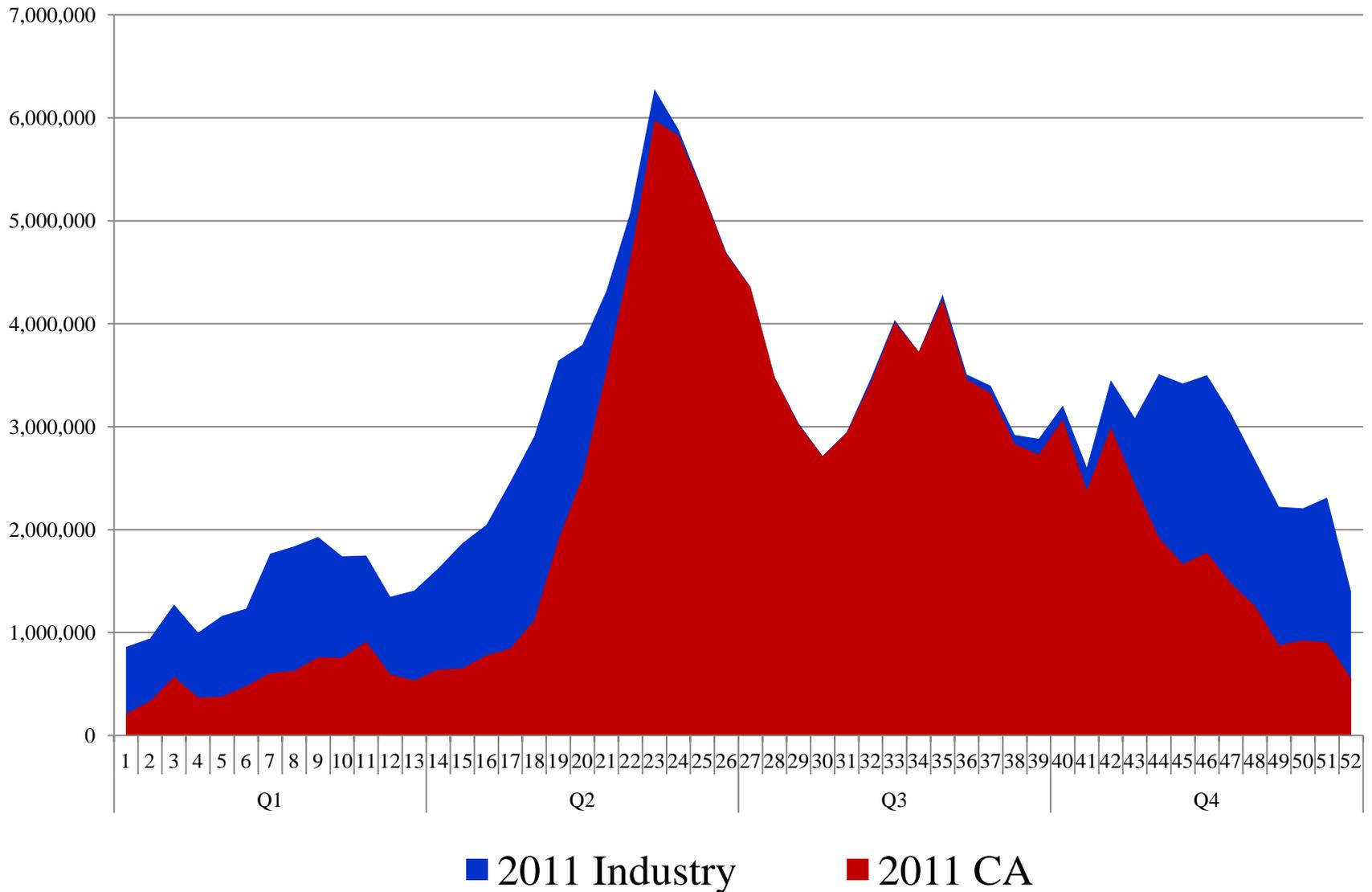


US Fresh Berry Consumption



2011 California Volume vs. Industry Volume *(lbs)*

(source: USDA)



Land in Raspberry Production

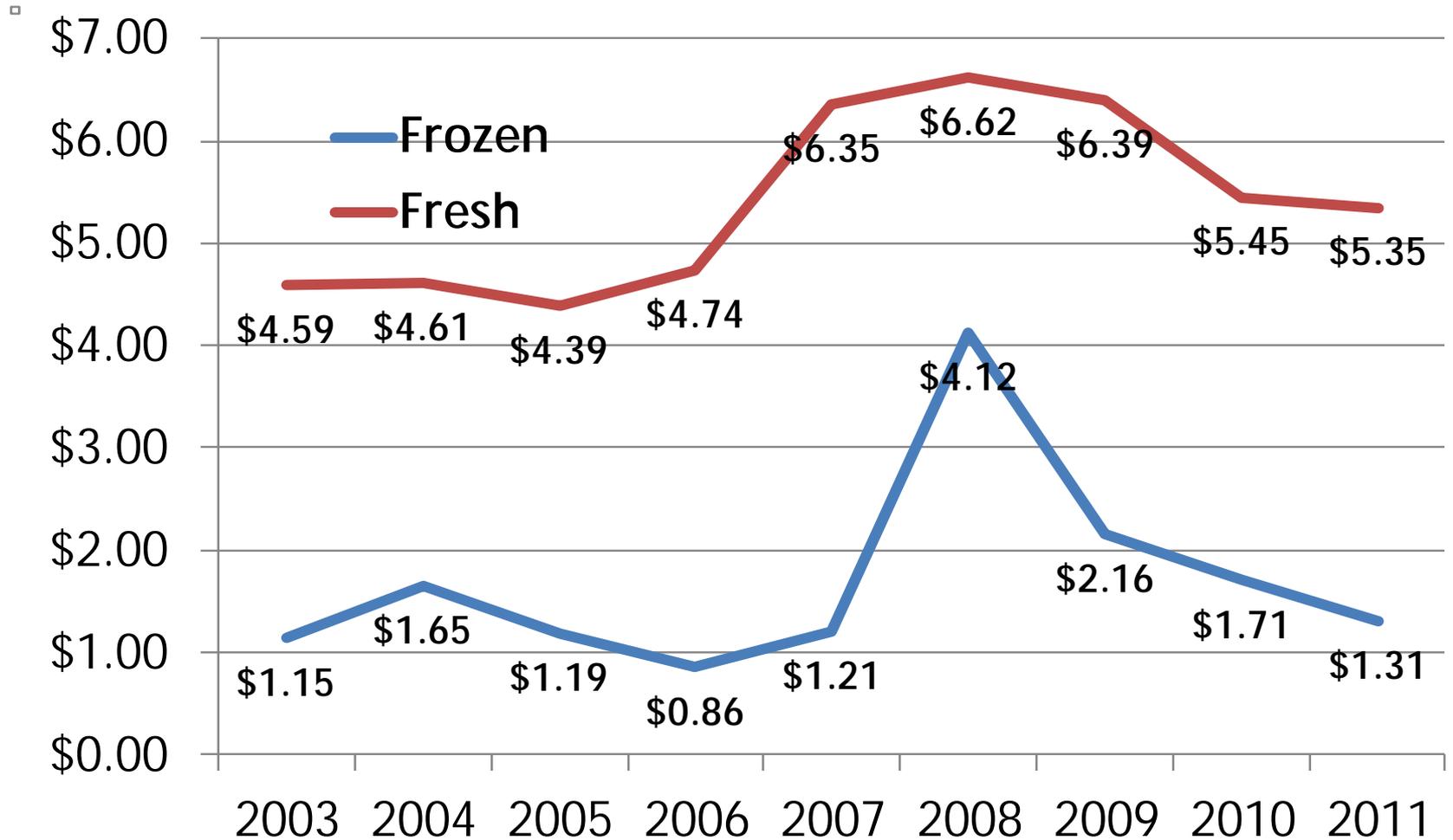
in hectares

hectare = 2.48 acres

Washington <i>(98% frozen)</i>	4,050
California <i>(95% fresh)</i>	2,100
Oregon <i>(80% frozen)</i>	540
All Other <i>(99% fresh)</i>	<u>350</u>
USA TOTAL	7,040

Raspberry Price to Growers

US \$/kg.



Trends and Projections

- **Cost of Production**
 - Avg. \$1.25 per kg. for processed raspberries
 - IQF quality increases costs
- **Processing Plants in PNW**
 - 10 IQF plants – 2 new in 2011
 - 18 Block Frozen
 - 4 Juice Concentrators

2012 Challenges

- New cultivar development
- Pest management tools
 - International maximum residue limits (mrl)
 - Buffers for endangered species protection
 - Spotted wing drosophila
- New product development leading to increased demand
- Increased grower acceptance of Good Agricultural Practices (GAP) – food safety, traceability
- Labor Supply

WASHINGTON Red. 
Raspberries