



CALIFORNIA CANNING PEACH ASSOCIATION

CLING PEACH REVIEW

Winter/Spring 2015





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ON THE COVER:
Photography: Ron Boone

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California Canning Peach Association 93rd Annual Meeting • January 20, 2015 STATE OF THE ASSOCIATION

Good afternoon and welcome to the Peach Association's 2015 Annual Meeting

As we begin the new year, the California cling peach industry outlook is much improved over recent years and I believe growers should have renewed confidence in our future.

We are very pleased to have reached an agreement with processors last month on pricing for our 2015 crop at \$460/ton. This price amounts to an \$81/ton increase over last year. It is also more than double the Association's previous largest single year price increase.

Most importantly, it is consistent with the responses we received from more than 130 growers during our Fall 2014 survey regarding the future raw product pricing necessary in order for the California cling peach industry to be sustainable in the coming years. Growers now have certainty on 2015 pricing and can meet with their lenders to secure needed crop financing and can also meet with their insurance agents to purchase 2015 crop insurance at higher levels of coverage. Hopefully this agreement will turn out to be a "win/win" situation by allowing processors sufficient time to communicate with their customers and use higher 2015 raw product pricing as justification for raising their selling prices in retail and foodservice sales channels in order to maintain their profit margins. However, most importantly, it is our hope that this pricing will lead to much needed new plantings of peach orchards to replace older orchards to enable us to meet the current market demand with domestically-grown canned peaches.

During the last 10 years, we have seen the industry's total bearing acreage decline by 37%

and yet we still have more old orchards than non-bearing orchards in the ground. Today all processors are willing to offer growers 20 year contract terms for new plantings. Hopefully the nurseries will now arrange to bud a few more trees so growers can plant more of our most desirable varieties in 2016 and 2017. Now is the time for growers to start these conversations with your local cannery field representative and your nursery salesperson in order to have specific commitments in place on any acreage you are considering planting in the next few years.

Obviously, I am pleased by our improved pricing in 2015. Farming peaches entails a great deal of risk and growers must see an opportunity to be rewarded for taking these risks. It was very clear to us that the combination of unchanged peach pricing along with consistently better returns from walnuts and almonds would lead to further peach acreage reductions in the coming years. Now it appears that we are swimming with the current rather than against it in 2015, as walnut pricing appears to have weakened while the peach price has increased by more than \$1,300/acre given average yields this year.

However, one year doesn't make a trend and we can't go backwards in our pricing after 2015. We must continue to keep pace with rising labor costs and competing crop margins in order to be successful in the future. It is my hope that we can continue to build on the progress we've made during the past 10 years – let's take a minute to walk back down Memory Lane and revisit the state of our industry in 2005.

10 Years Ago –

- The industry had 30,200 bearing acres; however, the Association began the year with



Rich Hudgins

Today, all processors are actively seeking additional acres to be planted in 2014 and 2015 in order to meet the current market demand.

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Expanding Peach Operation is a Family Affair

By Robyn Rominger

A progressive California farmer hopes that peaches can be part of a long-term, diversified strategy to provide a profitable opportunity for the next generation.

Jeff Cederlind of Cederlind Farms in Winton is expanding his peach operation with the help of his three sons, all of whom are in their early 20s.

“We wanted to expand our operation and the boys wanted to continue to grow peaches,” Jeff said.

Jeff is a second-generation farmer, following in the footsteps of his father, Dennis. “Dad bought his first piece of property in 1959 in the Turlock area. We got into peaches in 1999 with 20 acres. Here we are, 15 years later, with about 210 acres,” he said.



Derek, Cindy, Jeff, Mark & Kyle Cederlind.

Cederlind Farms grows about 770 acres of crops and produces turkeys, with operations in both Merced and Stanislaus counties. The family farm includes Jeff, his wife, Cindy, and their three sons: Mark, 24, Derek, 22, and Kyle, 20.

“I knew what I wanted to do since preschool,” said Jeff, who began farming full-time after graduating from Turlock Christian High School in 1986.

Cindy grew up in the Chicago area and after graduating from nearby Trinity International University, she moved to California and began teaching first grade at Turlock Christian School. She and Jeff met at church and eventually got married. After nine years of teaching, Cindy decided to become a stay-at-home mom. Today, with her children grown, she manages the payroll for Cederlind Farms.

The Cederlinds have about 145 bearing acres of cling peaches and have recently expanded their operation by 65 more acres.

“Right now, there is a demand for new orchards. The price for peaches has increased and the canneries want you to plant,” said Jeff.

The decision to plant more peaches was influenced by family considerations as well.

“We wouldn’t pursue peaches if it wasn’t family-positive because peaches are a lot of work. It’s five months of intense farming,” requiring precise irrigation and fertilization at critical times during the growing season, he noted. “The sizing of the fruit is something you really have to keep your eye on, to make sure they’re going to make it to size.”

The Cederlinds also produce winegrapes, almonds and walnuts, and they own a custom grape-harvesting operation.

“We’re fairly diversified, which is a good thing,” Jeff said. “We want to stay diversified because you never know from one day to the next what could happen to different markets. It’s a bit more of a challenge to farm that way because you’re thinking about many different directions.”

In recent years, there has been a strong demand for almonds, which are mechanically harvested and “very profitable,” he noted. “We’re bucking the trend a little bit. We have a lot of young almonds planted, but to stay balanced and diversified, we are growing more peaches.”

“And we’re planting them with the idea of machine harvesting in the future if we have to go in that direction—if the labor isn’t available,” Jeff added.

CCPA President, Rich Hudgins, notes that “A lot of people want to be diversified, but it’s tough because of the uncertainty regarding our labor situation.”

He adds that the state’s peach acreage has been affected by competing crops. “It’s less labor-intensive and less risk to grow almonds and walnuts,” he said. “Most growers are not increasing their peach acreage because almonds and walnuts are doing so well.”

Jeff is betting that in the future, some of the labor risk may be mitigated by mechanical harvesting.

“Jeff is a very progressive grower. He’s going to plant more peaches—that’s pretty progressive at this day and age. Not a lot of people are. I think he’s trying to build a future for his kids.”

Noting that Jeff’s three sons are young farmers, Hudgins said, “A lot of guys who don’t have younger children might not want to do it. It becomes more of a young man’s game and if they take the risk, they may reap the rewards. There’s a reward in it right now because the price is up significantly in 2015.”

The Cederlinds grow 13 varieties of cling peaches for Del Monte Foods and Seneca Foods. Their peaches are harvested the first of July through the end of August. They carefully manage their harvest schedule because if there

is a break during the peach harvest, laborers may leave to work on other crops in the region such as sweet potatoes.

“They’re going to go where there are crops; therefore, we try to get things organized during planting, so we don’t have big gaps in the harvest and have the labor leave,” Jeff said. “If we didn’t have harvesting, pruning and tying work for them, we could lose them to other crops.”

Water availability is also a major concern. Due to reduced surface-water supplies, the Cederlinds converted their peach orchards from flood irrigation to drip irrigation this year. They also put in a new well.

Rising costs for labor and other inputs pose a challenge for peach growers. “Our expenses are going up 8 percent to 10 percent a year, so the peach prices in the future will need to continue to follow that for us to be profitable,” Cederlind said.

Foreign imports of peaches, especially from China, continue to be an on-going issue. “Does America want dependence on foreign food? In foreign countries, they don’t have the same regulatory requirements as we do here,” he said.

Along those lines, regulatory compliance is a challenge, from pesticide-use reporting to operating smog-free tractors. “Those are things we really have no control over—we’re pretty much forced to do things.”

Cindy added, “It’s more paperwork.”

“And of course, Mother Nature always has the final say,” Cederlind said.

When Jeff isn’t farming, he enjoys playing golf. He coaches golf at Turlock Christian High School, and he coached Mark and Kyle when they were on the school’s golf team.

Jeff and Cindy find much satisfaction in the fact that their children want to continue their family tradition of farming. “We farm together,” Jeff said.



Jeff Cederlind holding peach.

In recent years, there has been a strong demand for almonds, which are mechanically harvested and “very profitable,” he noted.

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Annual Meeting Presentation



Dan Dooley

California Canning Peach Association 93rd Annual Meeting • January 20, 2015 KEYNOTE ADDRESS

I plan to spend some time this afternoon recapping our 2014 water situation and talking about what is on the horizon for 2015. I will also touch on Proposition 1 that passed in November, the long-awaited water bond, and then end up with a discussion on the groundwater legislation that passed the Legislature last August and was signed in September by the Governor and talk about what that means and where it's going.

The drought last year was wasn't of historic proportions, but compounded by some regulatory actions that did not exist in 1976-77, the impacts of this drought were made far more dramatic.

The drought last year was wasn't of historic proportions, but compounded by some regulatory actions that did not exist in 1976-77, the impacts of this drought were made far more dramatic. We had a shortfall of about 6.6 million acre feet in terms of surface water availability, there was an additional increase in pumping of groundwater of about 5 million acre feet leaving a net shortage of about 1.6 million acre feet. So, if you think about three and a half or four acre feet for permanent plantings, that's a lot of land that was stressed because of the lack of availability of water. Interestingly, there were not nearly as many acres fallowed early on in 2014 as first anticipated, but nonetheless the impacts were quite significant. The estimated crop revenue loss was about \$800 million. Additional pumping costs amounted to just under a half a billion dollars. The impact to livestock and dairy was a couple hundred million, for total direct losses to agriculture,

either through increased cost or lost revenue of about \$1.5 billion. When you add the multipliers on processors and suppliers, the total impact of the drought was estimated by my colleagues at UC Davis to be about \$2.2 billion as a result of the 2014 drought. Those dollars were mostly concentrated in the Central Valley of California which was much more dramatically impacted than some other regions of the state. Lost jobs were estimated to be over 17,000 – again many of those jobs were in the San Joaquin Valley. If you think about the types of jobs and the communities that were most impacted, those were areas that had the most need to begin with so the consequences were quite dramatic. A friend of mine who runs the southern San Joaquin community food bank programs, has estimated that for the four southern counties in the San Joaquin Valley that there were over a half a million people that went to bed every night not knowing where their next meal was going to come from as a result of unemployment that reached 30 or even 40 percent as a result of the lack of agricultural or food related jobs.

There was an expectation early on that this was going to have a dramatic impact on the cost of food. Although at this point, it is hard to tell if there was any impact on the cost of food. The overall Consumer Price Index (CPI) adjustment for all food products in 2014 was 2.7 percent, and if you look at processed fruits and vegetables, there was actually a reduction of .3 percent in the cost. So there does not appear to be any direct correlation, at least for one year, between the pressures on water supplies and the ultimate cost of food. There is an exception to that – the biggest impact reflected in CPI adjustments in cost were in the meat sector which rose just over 12 percent in 2014. There are some causation questions there. Was that as a result of the drought or not? So, 2014 was not a good year unless you are a water lawyer! Unfortunately, 2015 isn't shaping up much

better. We got all excited in the first couple of weeks in December because we had a series of storms come through. We'd have an 18 hour break and then another storm would come through. You had the feeling that this was like 1978 and that these storms were going to start coming one after another. Does anybody remember the last time it rained? It was before Christmas that we had any significant rain. (You can tell when we're in a drought because the meteorologists on television report trace amounts and historically trace amounts don't mean much of anything.)

If you look at current reservoir storage conditions around the state, the highest in the state at the moment is Shasta at two-thirds of average for this time of year. The low is McClure Reservoir on the Merced River at 14 percent of normal for this time of the year. The further south you go the worse it gets in the San Joaquin Valley. Isabella and Pine Flat are just below 30 percent of average storage for this date so there's not a great prospect, unless we have storms everyday between now and April 1, that things are going to dramatically turn around.

The first snow survey results are going to be released on Feb. 1, but every expectation is that snowpack is going to be well below normal unless something dramatic happens in the next few days. I checked the weather this morning and the 10-day forecast, at best, shows a 20 percent chance of rain in the next five or six days. So 2015 is shaping up to be equally as bad as 2014 and that is going to put increasing pressure on groundwater supplies and put increasing pressure on the markets for water transfers and it's going to challenge our state's infrastructure to be able to respond appropriately.

I can tell you that if you just looked only at precipitation numbers you can feel less pessimistic. The Northern state is actually at or above normal in terms of rainfall. The Central part of the state is a bit below normal and the Southern part of the state is a tad above normal; however, that's rainfall and what we really need is snowpack and we are not getting the snowpack. The snow elevations are high, it's in the central and southern Sierras, so it's not looking good at the moment.

One thing I can tell you is the state's regulatory agencies are going to do everything that they can to make provisions for water to meet health and safety needs, making sure we get water to communities that have unreliable water supplies so that we can take care of the needs of people and many of those are in agricultural regions – places like Firebaugh, Mendota and Huron which have to rely on the projects to provide some needed water supplies. Unless something happens meteorologically, there will be actions by the state board to curtail water rights in 2015. That's a very controversial thing. Last year was the first year that it's been done but the reality is they were attempting to curtail water rights based on seniority of rights, so if you were a junior water holder, to protect the rights of the senior water right holders, they implemented the curtailments. I am quite certain unless something changes in the water supply dynamics that they will do that again. There is going to be a greater focus in 2015 on fisheries (as described in a recent Sacramento Bee article regarding five species in the Delta). What is quite certain is the dry conditions are having adverse consequences on people who rely on having sufficient water to grow the crops and supply their homes, but also on species that rely upon water for their survival.

It is going to be a challenging year. Every day that goes by in this period of the year makes it more challenging to pick up ground because typically 75 percent of our precipitation falls between Jan. 1 and the 15th of March, so we are already 20 days into that wettest cycle of our hydrological year and the opportunity to make up lost ground is not very good. As growers, make sure you have efficiency tests done on your wells, make sure you have the bowls as low as you can set them so that you don't have to scramble around to find someone to pull your well in the middle of the season when people are lined up to get well drillers and people to work on their wells. Unfortunately, we are continuing to put deeper straws into the existing groundwater basins which has long-term adverse consequences.

Now to better news, Proposition 1, the water bond authorized by the Legislature in 2008,

Every day that goes by in this period of the year makes it more challenging to pick up ground because typically 75 percent of our precipitation falls between Jan. 1 and the 15th of March, so we are already 20 days into that wettest cycle of our hydrological year...

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President's Report - 93rd Annual Meeting

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nearly 4,000 unsold acres. The 2005 Unsold Pools returned \$231/ton for previously contracted fruit and \$131/ton for fruit from orchards planted without a contract.

- We were plagued with oversupply which resulted in depressed selling prices by processors.
- Signature Fruit was still owned by John Hancock Insurance Company and California Fruit & Tomato Kitchens was still in the peach business.
- The 2005 peach price averaged \$237/ton with pricing at breakpoints of 0-3%, 3-5%, 5-8%, etc. Final grower payments were due December 1.
- Grading for green and soft fruit was subjective and any No. 2 fruit over 5% counted on the Schedule of Values offgrade. And finally, canners offered just 10-year terms for new plantings, while some growers planted orchards without any contract at all.

Clearly, we have come a long ways since 2005. I remain optimistic regarding our ability to continue making further progress during the next 10 years as well. While our immediate goal is to get an adequate number of new acres planted so we can meet current demand, we can't lose sight of our other priorities – controlling costs, improving raw product quality, and finding new markets for our products.

For more than 30 years, the cling peach industry has funded varietal research efforts at U.C. Davis through our state marketing order. While this effort has resulted in the development of many of the most popular cling peach varieties grown in California today, we must accelerate the introduction of the next generation of new higher yielding varieties. Our average yields have plateaued for the past decade after increasing steadily during the 1970's and 1980's. During the coming year,

the Peach Association will coordinate with U.C. plant breeder Tom Gradziel and his team to aggressively rollout several of his newer experimental varieties so they can be evaluated under commercial growing conditions. At the end of the day, all the research in the world will do no good until the industry can implement the results. Simply put, get us the trees and we will find growers interested in planting them.

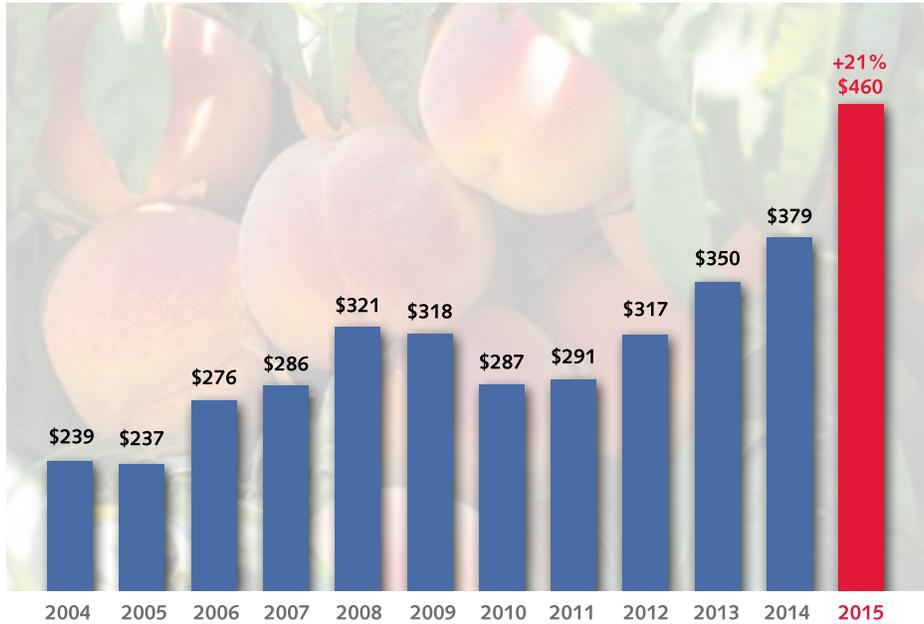
Since 2008, growers and processors have also been working together jointly to administer the Canning Peach Mechanization Research Fund. While we have made some progress on mechanized fruit thinning technology and have evaluated several new mechanized harvest options, much more work remains to be done to reduce our industry's reliance on hand labor for nearly all of our thinning and picking. Recognizing that labor availability and labor cost pressures continue to be major problems faced by all growers, canners increased their machine harvested fruit delivery volume in 2014. While CCPA members did deliver 25% more machine harvested fruit in 2014 (despite an 11% reduction in our overall crop), we still have not matched the delivery totals achieved back in 2007 and 2008 when labor was less costly and more readily available. This must remain a work in progress for 2015 and beyond. Obviously labor costs will continue to increase in coming years as California's minimum wage rises to \$10/hour on January 1, 2016 and our current ag workforce continues to shrink.

Secondly, our efforts to improve raw product fruit quality also must incorporate results from our varietal research work at U.C. Davis. Trees capable of more uniform fruit ripening and having the ability to let fruit hang on the tree for a longer period without softening would significantly improve case yields at the cannery and would also enhance our ability to deliver more machine harvested

Clearly, we have come a long ways since 2005.

I remain optimistic regarding our ability to continue making further progress during the next 10 years as well.

California Cling Peach Price Trends (Price/Ton)

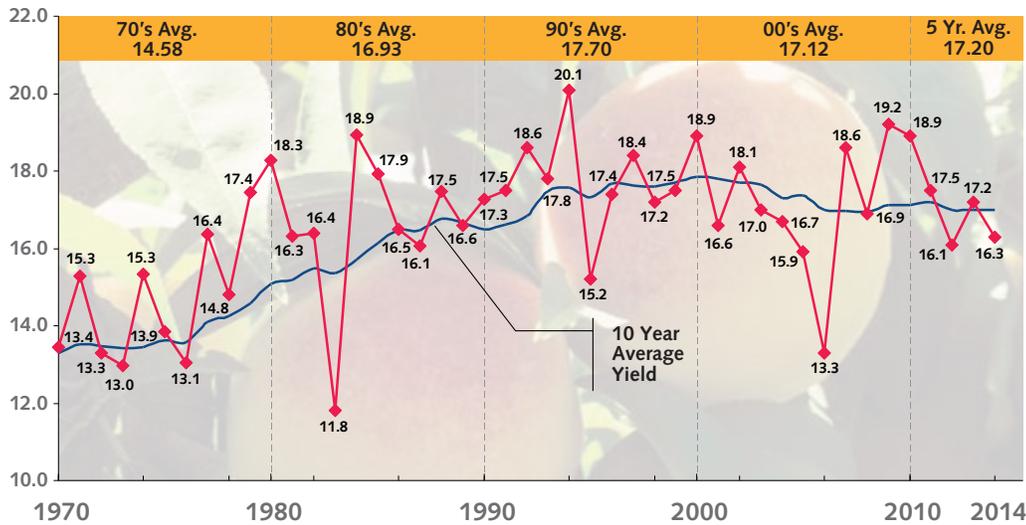


...we must accelerate the introduction of the next generation of new higher yielding varieties. Our average yields have plateaued for the past decade after increasing steadily during the 1970's and 1980's.

California Cling Peach Production Trends Yield Per Bearing Acre

1970 - 2014

Tons / Bearing Acre



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President's Report - 93rd Annual Meeting

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fruit in future years. We have a few scattered experimental blocks of these so-called “Long Keeper” varieties in production, but there is currently a lack of budwood to expand these plantings significantly next year. As more trees become available, we will line up growers to plant them so growers can get fruit with more uniform maturity delivered to the plant in coming years.

The third focus area is developing new markets for our products. While sales of the 2014 canned peach pack is more a function of our limited supply than market demand, we must recognize that total domestic retail sales of canned peaches are likely to continue posting slight year-to-year declines and that peach growers don't have the resources which would be necessary to turn this trend around. However, there are additional market

opportunities which should offer us the chance to offset this declining retail sales volume. The most obvious growth opportunity is the USDA's school feeding program. For two years running, USDA representatives have been unable to source all the canned peaches they were seeking to purchase for use in the school lunch and school breakfast programs.

As you know, schools have been charged with increasing the amount of fruits and vegetables being served to students each day. In addition, USDA will only purchase domestically-produced fruits and vegetables for use in these school feeding programs. Canned peaches are popular with kids and they offer schools a lower cost per serving than most fresh fruit options. This represents a great opportunity for us and the Peach Association will continue our leadership effort to expand sales of canned

We must be working now to develop new markets in order to reach our ultimate goal of ensuring that there will still be attractive markets for our peaches 10 years from now despite the trend of declining U.S. retail canned peach sales.

Remaining U.S. Canned Peach Exports All Countries Except Mexico, Canada & Thailand

Thousands of Cases



PHOTO BY: KIM ROONE

peaches to schools as additional volume becomes available in the coming years.

Secondly, we will also continue to work with our canner customers to expand future U.S. canned peach exports beyond our traditional markets in Canada and Mexico. The U.S. currently exports fewer cases of canned peaches than any other major peach producing country. There is a rapidly expanding middle class of consumers in all parts of the globe looking to improve their diets by incorporating more California-grown products. Since 80% of the world's purchasing power and 95% of all consumers live outside the U.S., we must continue to seek our share of these new opportunities. The Peach Association will continue our work with processors to identify and pursue new export market options for our products. We must be working now to develop new markets in order to reach our ultimate goal of ensuring that there will still be attractive markets for our peaches 10 years from now despite the trend of declining U.S. retail canned peach sales.

At this point, I could easily transition to a discussion of the challenges we continue to face in 2015. Suffice it to say that the themes are familiar ones and problems that have easy solutions are not on the list. However, that's not what I plan to do today. What I am hoping that you take away from my remarks this afternoon is a renewed sense of optimism for our industry's future. I've always had a "glass half full" perspective – the truth is, you don't survive 33 years in this business without it! However, for my entire career, I have witnessed the ingenuity, the skill, and the work ethic that peach growers possess in adapting to new challenges and finding solutions to problems whether they originated on the farm or in the form of new regulations impacting our industry. I am convinced that this adaptability gene is part of every peach grower's DNA and that it will result in many more successful years for the peach industry in California.

I also know that California peach growers have a long history of being good stewards of the

land, of our air, and of our water. In addition, the Peach Association has been very fortunate to have generations of growers who have also been good stewards of our cooperative. We are gathering for our 93rd Annual Meeting today because of the willingness of generations of peach growers to focus, not on their individual differences and any personal agendas, but on common goals for the benefit of all Association members and the entire cling peach industry.

I spoke earlier this afternoon about the contrast between 2015 and 2005, I would also like to recognize the contributions of nearly half of the Peach Association's Board of Directors who have served continuously on the Board for the past decade – it's been quite a ride. Serving as a Board member of any farmer-owned cooperative requires a number of sacrifices. CCPA Board members take time away from their own farming operations seeking to do the right things for the peach industry. In the course of a year, they spend many hours around the Board table debating the issues and working to find the right answers to questions which don't always have simple answers.

In addition to our 10-year veterans, we have a good mix of newer Board members which adds the "fresh set of eyes" perspective to our Board discussions. Believe me, there have been very few boring discussions at our Board meetings in recent years.

We have been very fortunate during our 93-year history to have a long line of Board members who were willing to serve and assume the responsibility of leading our organization and I fully expect this to continue for the next generation of peach growers.

My Annual Meeting speech wouldn't be complete without recognizing the members of the team who serve as the staff of the California Canning Peach Association. They truly are the backbone of the organization

In addition to our 10-year veterans, we have a good mix of newer Board members which adds the "fresh set of eyes" perspective to our Board discussions.



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Spotlight Album Annual Meeting

KEY:
All photos
left to right



Kraig Kayser, Sunny Dale



Billy Dhami, Sarb Thiara, Gurnam Pamma,
Balbir Sohal, Jasbir Bains



Nachhattar Chohan, Didar Bains,
Mohan Bains, Harbhajan Sandhu



Rajinder Chohan, Marjorie Bishop
(Obertheier Award)



Jaswant Bains, Satinder
Davitt, Gary Thiara



Surjit Bains, Rajeev Davitt, Ravi Thiara



Peach sample tables



Annual Meeting Audience
(Dan Dooley speaking)



Rajinder Chohan, Ron Martella,
Satpaul Bains, Mohan Chohan



**Rich Hudgins, Rick & Debbie Zolezzi,
Ken Bettencourt**



Peach sample tables



Rich Hudgins



**Kashimir Cheema, Parm Shahi,
Shindi Thiara, Harminder Sohal**



Kuldip Atwal, Richard Lial, Peter Martini, Ken Bettencourt

Below: Kulwant Johl & Shindi Thiara



Suki Bains, Ranjit Davit



Harry & Gail Berberian, Ron Schuler



Ajayab Dhaddey



Brian Sowden

More pumping will further deplete water tables beneath our crops.

Northern District

Lack of rain amid California's ongoing drought is on the minds of growers this winter. Although we received plenty of rain in December, January has had no measurable rain. In fact, this was one of the driest January's in the State's recorded history. Water and its availability is still the major concern to all California growers. Adding to the concern is that this winter is proving to be very mild so we have very little snow pack, which means less runoff to replenish our lakes and reservoirs during the spring and summer months. As a result, irrigation districts will likely be forced to further curtail water deliveries to growers this year.

With this winter being fairly mild, the chilling hours we have received have been really low. Cling peach trees require a minimal of 800 chilling hours through the months of November to the end of February. As of February 2nd we have acquired 470 hours, which is a little over half of where we were a year ago. In fact, 470 hours is the second lowest chilling hour total we have seen in the last 20 years. The only year with fewer chilling hours than 2014/15 is 1996 with 441 chilling hours recorded as of February 1.

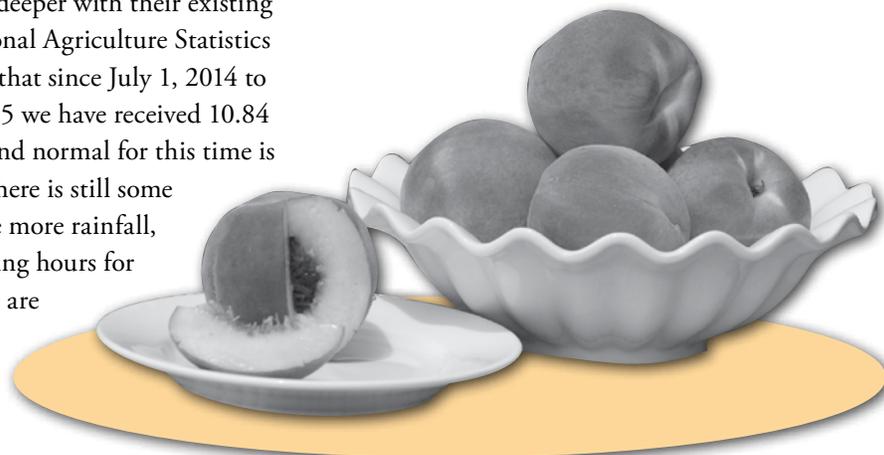
In response to the drought, some growers have added wells to their fields while others have had to go deeper with their existing ones. The National Agriculture Statistics Service reports that since July 1, 2014 to January 25, 2015 we have received 10.84 inches of rain and normal for this time is 11.36 inches. There is still some time to acquire more rainfall, snow, and chilling hours for February, so we are

going to stay optimistic. However, we need a drastic change in weather for February.

Out in the orchards growers have been able to do a majority of the pruning, shredding, weed spraying and dormant spraying done. Also, growers have begun to start planting trees, which is earlier than normal because of the mild winter. For 2015 we are estimating around 1,000 acres will be planted statewide this spring. Moving forward this year, we strongly urge you to contact nurseries early if you are interested in planting in the 2016 season. All canners are currently offering 20-year contracts for new plantings and several have planting incentive programs for growers. A limiting factor on new plantings is limited ground availability since a great deal of the Yuba/Sutter area's typical orchard ground has already been converted into other permanent crops.

Since the end of harvest, growers in the northern districts have pulled 744 acres out of 1,524 acres statewide. These pullouts will leave the industry with less than 19,000 bearing acres throughout the state in 2015.

In closing, we would like to thank everyone who attended the Annual Meeting on January 20th in Sacramento and we look forward to working with our members during the coming 2015 harvest. 🍑



President's Report - 93rd Annual Meeting

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and I am very proud of their accomplishments and dedication to meeting the needs of our members.

If you were listening closely, you may have noticed something different during my staff introductions – for the first time in 32 years, Bill Bryan's name wasn't mentioned as our Modesto field representative. Bill retired at the end of December and is eagerly looking forward to his first ever summer off – obviously, we wish him a long and happy retirement. On a related note, we are now looking for a new Modesto area field representative. If you know of someone we should be visiting with regarding this opportunity, please let us know.

Just as the CCPA staff works together as a team, the path to continued industry success will require growers and processors to work together even more closely in the coming years. Neither growers nor processors can succeed if the other is not successful as well. If we are all moving forward together, then success will take care of itself.

In closing, you can be assured that the Peach Association will continue our 93-year leadership role as we seek to maintain a profitable and successful California cling peach industry for many years to come. I am very proud to serve as your President. Best wishes for a successful 2015. 🍑



Staff Changes at CCPA



Bill Bryan

After 32 years of service as a Peach Association field representative, Bill Bryan has retired as of December 31st. He is now eagerly looking forward to his first-ever summer off. We wish Bill a long and happy retirement.



Steve Mobley

We are pleased to announce that Steve Mobley will be serving as our new Modesto/Kingsburg field representative beginning in March, 2015. Steve previously worked for the Peach Association from 2006-2012 as a part-time field representative in the Kingsburg area.



Keynote Speaker - 93rd Annual Meeting

Continued from page 7

Sites Reservoir makes a lot of sense economically. Of the surface projects out there that are politically feasible, it is by far the cheapest water to be developed...

supposed to be on the 2008 ballot (taken off) supposed to be on the 2010 ballot (taken off), supposed to be on the 2012 ballot (taken off), because all of the polling showed that it didn't have a chance of passing. In order to cobble together the votes in the Legislature they added projects in legislators' districts. This further complicated getting the political support necessary to get the bond passed. Enter Jerry Brown, who is famously frugal. He put a lot of pressure on the Legislature and the advocates to be more reasonable regarding the costs and the type of projects that were being funded. At the end of the day there was a negotiated agreement. It does include \$2.7 billion for water storage. The expectation is that a significant portion of the funding will be used for Sites Reservoir which is an offsite reservoir in Colusa County and Temperance Flat which is upstream of Friant Dam on the San Joaquin River. I think Sites Reservoir makes a lot of sense economically. Of the surface projects out there that are politically feasible, it is by far the cheapest water to be developed largely because they can use a lot of the Glenn-Tehama-Colusa infrastructure to get water to the reservoir site and generate power coming out and they can store water until there is a demand for it and it can serve a lot of different needs. It has a lot of utility and the capital cost per acre foot is relatively cheap.



You also hear a lot of people advocating for Temperance Flat but you don't hear about anybody agreeing to pay the capital obligation. It is a very expensive project at \$3.5 billion for 90,000 acre foot of yield. Even if 50 percent of the benefit is a public benefit, I don't see any local water contractors stepping up to the table to repay the remaining

obligation. It is clear in the bond that some of this money can be used for groundwater storage and quite candidly that is the cheapest water storage out there. There is a 50 percent cost-share in the storage component so they are going to be hard pressed to find somebody willing to front the 50 percent. I would not be surprised by a shift of some of that money into groundwater storage in future years.

There are also significant monies in Prop. 1 for groundwater quality, ecosystem restoration, and watershed management and a bit for flood protection; the total bond measure amounted to \$7.5 billion dollars but about \$400 million of that is money that was already approved and rolled into Prop. 1. For the storage component, the California Water Commission has complete authority to make determinations about how that money gets allocated. That authority is very unusual for an unpaid commission, but now they get \$4.5 billion and get to determine how that gets allocated. They are currently in the process of establishing parameters for how these funds get allocated. That's a little bit about the water bond. By now, and in 2016 a lot is going to be happening, it will serve you well to pay attention to what's going to be happening and appropriately weigh in if you are so interested.

Regarding the Delta...once every generation or so we get close to a fix and then it falls apart and we have to wait for another 20 years before we can revisit the issue. It's very complicated. The governor has his proposal out there in the Bay Delta Conservation Plan. It was recently tweaked to eliminate some intake pumps and to change the way it operates in quite significant ways which outlined in some environmental documents which are out for public comment now. I think the public comment period closes mid-summer. I assume it's going to make it through that process, but the reality is if somebody can figure out how to cobble together the political coalition to support the project, I have a hard time seeing how

it moves forward soon. The issue here is the high cost so the state contractors and federal contractors that are looking for reliability from the Delta, are the likely people to step to the table and say, if we pay for it, what will we be getting? A response saying, we want you to repay the capital obligation, but we can't tell you if you are going to get more reliability out of the Delta even if we have the tunnels, will create a very difficult dynamic to get anybody to agree to repay several billion in costs for a project. Whether you agree with the project or not, the reality is the people who would have to fund it must have some certainty about what they get in exchange for what they are paying. Those things will be 11th hour negotiations, including state and federal agencies and fisheries' agencies all in the room, probably at very high levels including the White House and Governor's office. In my opinion, that is what it is going to take to get something done.

Lastly, I will touch on groundwater regulation. Whether you like the groundwater bill or not, it is the most significant piece of water legislation to pass in California in 100 years. We were the only western state that had no management or regulatory structure with regard to groundwater. People in agriculture, I think, are increasingly aware that there's an issue out there and we have to address it. Groundwater is going to become a part of a long-term, sustained agricultural infrastructure in California. My guess is if you look south of the Kings watershed, we are oversubscribed on groundwater to the tune of about 20 percent. If you are going to bring those basins into balance, there's going to have to be either an augmentation of surface water supplies (and you can speculate on the likelihood of that) or a reduction in extractions of groundwater on the order of 20 percent. That doesn't have to occur tomorrow because we have enormous reservoirs stored in those groundwater aquifers, but as many people know, you have to lengthen the straw every so often to continue to rely on those supplies and the cost escalates because it takes more power to lift. There's a greater recognition than I've seen in 30 years in the water business, that what we're doing is not sustainable. What is the cause of it? Well,

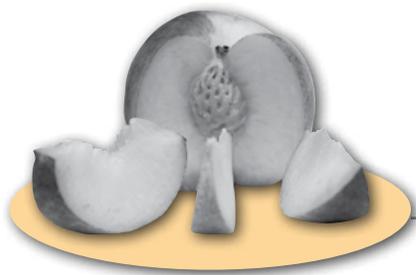
a lot of people like to say it is because the Endangered Species Act is limiting pumping from the Delta. It certainly has an impact, but we've also increased permanent plantings enormously in the southern Central Valley. These crops tend to use more water than the row crops they replaced. We also had an enormous influx of dairies, many on marginal ground that previously were growing small grains, if anything, beforehand and are now growing two or three crops a year using six or seven acre feet of water per acre. Our urban population has grown. Most of the urban centers in the San Joaquin Valley rely on groundwater, so there's a whole host of things that have caused us to be in this condition and we've got to address all of these things. We've got to have a more sensible regulatory structure that allows us to rely more predictably on exports to the San Joaquin Valley and we have to manage local supplies more efficiently than we have in the past. The groundwater bill sets up a structure that empowers local agencies to oversee groundwater aquifers or sub basins. They can form an agency, or use existing agencies – they can cobble together a whole bunch of agencies and develop groundwater sustainability plans that are designed over a 20-year horizon to bring those basins into some sort of balance. People were generally supportive of that notion. It's what happens next that is the step that got many people excited.

The backstop is, if local agencies are not formed, if they don't develop a plan, if they are not meeting the metrics in their plan, the State Water Resources Control Board (SWRCB) has the authority to intervene and impose an interim plan, including pumping restrictions and taxes on the local area until the local entities can get their act together. That, as you might expect, raises the hackles of a lot of folks; some just don't think the SWRCB has the capacity to do that effectively. If they do it at all, it's going to be messy. It is likely there will be some proposals to clean up the bill. It clearly has some problem areas in it. There will be some efforts to create a more efficient process to



Whether you like the groundwater bill or not, it is the most significant piece of water legislation to pass in California in 100 years.

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Promoting California Canned Peaches Around the World

By Michelle Paul, Export Promotions Consultant, Bryant Christie Inc.

Every year, the California
Cling Peach Board (CCPB)
receives roughly \$500,000
through a federal grant to promote
California canned peaches in export
markets.

This funding is awarded through a competitive application review process administered by the United States Department of Agriculture (USDA) Foreign Agriculture Service (FAS) branch. Through this grant, or the Market Access Program (MAP), consumers, retailers, and foodservice professionals in Mexico and Canada are exposed to the high quality, taste, and consistency of California grown cling peaches. The MAP funds allow the CCPB to greatly leverage the \$150,000 in grower assessment funds allocated for export promotion activities each year.

During the 2013/14 marketing year, 1,068,945 cases of canned peaches were exported around the world, with some cases traveling as far as Japan. However, the majority of canned peach exports are distributed in Canada and Mexico, representing 44% and 46% of all exports. To support the sale of product moving to these markets, the CCPB contracts with in-country representatives to maintain close contact with primary retail and foodservice purchasing decision makers. These promotional efforts have proven particularly successful in Canada.

Since the 2010/2011 marketing year, exports of canned peaches to Canada have grown by 56%. Between 2012/13 and 2013/14 alone, exports grew by nearly 10%. While such a significant growth in export volumes to Canada is partially offset by declines in

our Mexico export volume due to higher selling prices to Mexican wholesalers and importers, it demonstrates the success of recent promotional activities supported by the CCPB.

Every month, the CCPB's Canadian representative Ken Berger sends the industry a detailed report covering the availability, price, and country of origin of canned peaches on supermarket shelves across the nation. In addition, Ken provides a spreadsheet listing all canned peach products that are advertised at a discounted price on a weekly basis. This information is invaluable when developing in-store sampling events and other promotions, supported by both the CCPB and by individual processors and distributors active in this market.

Ken Berger not only provides a window into the Canadian market for the cling peach industry, but has also positioned himself as the 'eyes and ears' of the CCPB. By consistently meeting face-to-face with processors, distributors and retail category managers, Ken has successfully organized a robust schedule of promotional events. Most recently, samples of California cling peaches were offered at every Save-On grocery store in Alberta and British Columbia provinces. The CCPB is also planning a large promotion in partnership with Conagra (Del Monte), featuring California peaches in grocery stores across Canada.

Besides supporting retail promotions, the CCPB Canadian program also targets consumers. In February, 2014, the Board commissioned a comprehensive consumer research study. Over a one-month period, researchers met with consumers in focus groups and collected data through online surveys of Canadian consumers. Through this research, the CCPB has determined how Canadians prefer to eat canned peaches and the most effective promotional methods to

The MAP funds allow the CCPB to greatly leverage the \$150,000 in grower assessment funds allocated for export promotion activities each year.

increase their consumption. This research was also made available to each processor to assist with the development of their own promotional programs.

In addition to research, the CCPB has also developed a consumer-facing public relations campaign in Canada. Through regular distribution of press releases highlighting the findings of the Oregon State University study comparing fresh to canned peaches, California cling peaches are consistently featured in print and online as a healthy alternative to fresh produce throughout the winter months. The CCPB is also working to place chefs and nutritionists on TV talk and news shows to highlight the nutritional value of canned peaches. Both radio interviews and TV placements allow for messaging and branding in a way not always permitted by other media.

The final component of the Canadian marketing program is a partnership between the CCPB and the foodservice sector. The CCPB regularly advertises canned peaches as a perfect ingredient in trade magazines such

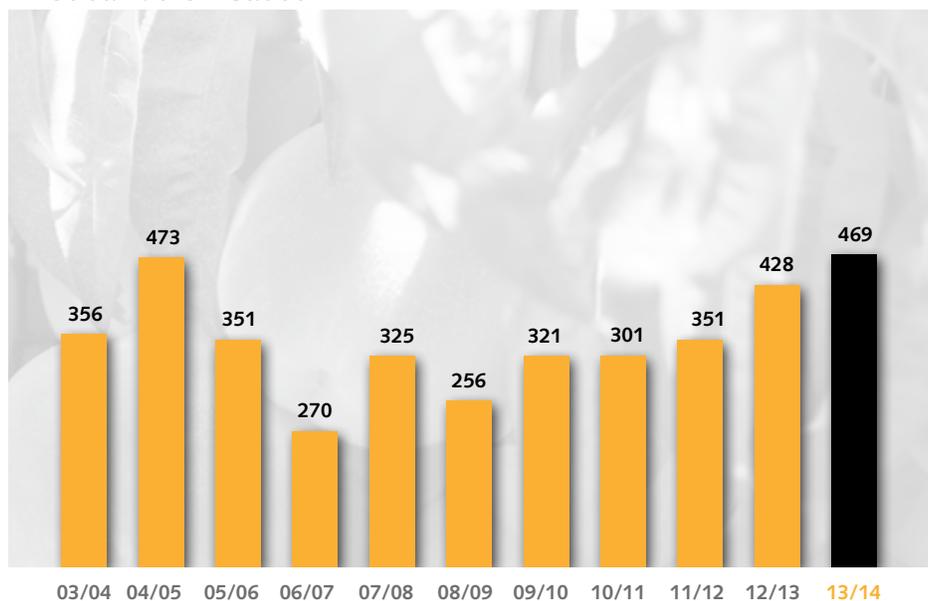
as Sysco Today. In 2014, the CCPB developed five additional recipes with photography to promote the versatility and unique flavors of canned peaches. In addition, the CCPB sponsored a group of foodservice and retail professionals to travel to California and visit peach orchards during harvest. The group also toured two peach canning facilities. Through events such as these, the CCPB is exposing key decision makers and influencers to the high food safety standards, consistent quality, and great taste of California cling peaches. This is particularly important as competition from off-shore product intensifies.

Unlike Canada, California cling peach exports to Mexico have decreased in the past year. This decline is largely attributable to an increase in canned peach prices, an increase in the value of the US dollar against the Mexican Peso and stiff competition from products sourced from China, Chile and Greece. From June, 2013 through May, 2014 California exported 496,000 cases of canned peaches to Mexico. Despite a 25% decrease over the year prior, Mexico maintained its

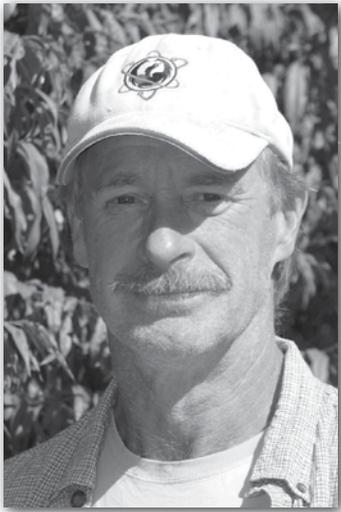
...the CCPB is exposing key decision makers and influencers to the high food safety standards, consistent quality, and great taste of California cling peaches.

U.S. Canned Peach Exports to Canada 2004-2014

Thousands of Cases



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Tom Gradziel

New Processing Peach Selections in the Dixon-Andross Gap

Tom Gradziel, Department of Plant Sciences, University of California at Davis.

A key requirement for processing peaches is a continuous supply of quality fruit to the canneries.

A major goal of the UCD processing peach breeding program has been the development of a series of varieties allowing continuous harvest to complement early California varieties such as *Carson*, *Andross*, *Halford* and *Sullivan#4* (Chart 1). The remaining gap in this series is sometimes referred to as the *Dixon-gap* or *Dixon-Andross* gap and has been a particularly difficult breeding problem. This time period appears to represent a critical threshold for peach fruit development such that most seedlings resulting from traditional crosses in the breeding program tend to ripen either before or after the gap, and those few maturing within the gap are very susceptible to pit problems, including pit-fragments and red pit-staining. (Both lignin formation which gives pits their hardness and anthocyanin formation which results in the red pit-staining are in the same biochemical pathway). The

commercial variety *Dixon* which ripens at this time had to be abandoned because of these problems despite its high productivity and otherwise good fruit quality, and the variety *Andross* is also very susceptible. Part of the difficulties in breeding improved varieties is the highly inbred nature of California processing peach germplasm, with most commercial varieties tracing their lineage back to only two or three original parents. Thus, an important early breeding objective was to bring in new germplasm to address these well established, as well as emerging industry problems, and to then genetically recombine this material to optimize both the desired target traits as well as commercial quality and productivity under California growing conditions. The following 3 advanced UCD selections are results of this process and contain new germplasm from Europe, South America and South Africa (Figure 1).

Kader is a newly released processing peach variety ripening just after *Carson*, though because of its ability to maintain good on-tree fruit quality can be harvested up to a week after the full-ripe stage. Trees are productive with high-quality fruit for processing

This time period appears to represent a critical threshold for peach fruit development such that most seedlings resulting from traditional crosses in the breeding program tend to ripen either before or after the gap, and those few maturing within the gap are very susceptible to pit problems, including pit-fragments and red pit-staining.

Table 1. Fruit characteristics of Extra-Early and Early-Season UCD processing peach selections compared with standard cultivars. [Data averaged from multiple years following heavy fruit thinning to assess maximum fruit sizing potential. Higher Fruit Brown Rot numbers indicate higher susceptibility. The (a*) color value increases from green-yellow {as in Carson at ~5} to yellow-gold{ a* =12}.

UCD Selection	Ripe Date	Brix	pH	Brix/TA	Firmness (lbs.)	Max. Fruit Weight (g)	Susceptibility to Brown Rot	Color (a*)
Carson	20-Jul	10.4	4.0	18.6	6.7	219.5	13.2	4.97
Kader	22-Jul	12.9	3.9	26.9	7.2	332.7	3.1	6.98
Early#6	30-Jul	11.7	3.8	21.4	7.3	237.9	4.2	5.73
Early#5	2-Aug	11.9	3.7	21.3	7.9	235.7	6.4	7.19
Dixon	27-Jul	12.8	4.1	32.1	5.5	226.4	16.4	6.07
Andross	2-Aug	12.6	4.1	30.8	7.6	332.2	11.7	6.87



An Early #5 tree with ripe fruit

Traits incorporated from the South African germplasm include improved fruit firmness and fruit brown-rot resistance, and a suppression of red-pigmentation throughout the fruit including the fruit cavity]. This suppression of red-pigmentation results in a uniform golden yellow flesh color. *Early#6* ripens approximately three days before *Andross* with desirable levels of fruit sweetness and acidity along with good fruit firmness (Table 1). Trees tend to crop heavily with fruit displaying good uniformity in size, shape and color.

Early#5 ripens with to just after *Andross* and is similar to *Andross* in fruit sweetness, acidity, firmness and color. Size of commercially thinned fruit for *Early#5* as well as *Early#6* is also comparable to *Andross*, though over-thinned fruit will not continue to size as



Figure 1. Processed fruit samples for the new UCD variety 'Kader' (top) and Advanced Selections *Early#5* (center) and *Early#6* (bottom).

Continued on page 22

(Fig. 1) and with a low incidence of pit-fragments and red pit-staining despite its maturation in the *Dixon* gap. Its high sugar content (Brix) and low acidity (pH) are both desirable for processing as is a Brix/TA ratio of over 20 (Table 1). Fruit firmness, color and maximum size potential are comparable to *Andross* though with improved Fruit Brown Rot resistance. The potential for large fruit size allows over-thinned trees to develop correspondingly larger fruit and so maintain higher yields. The lineage of *Kader* includes breeding material from Europe and Brazil as well as traditional Californian processing peach varieties. It is the results of over 20 years of breeding efforts with most of that time spent in testing its early and mature tree productivity and fruit processing quality in each of the major California growing regions. The variety *Kader* was released in the summer of 2014 and virus-free foundation stock has been made available to California nurseries for commercial tree propagation.

Early#6 is the most recent advanced UCD breeding selection ripening in the Early-harvest season and combines processing peach breeding germplasm from California and South Africa. [The 'Early' designation identifies the harvest season while '#6' identifies its order of release for grower testing rather than order of harvest date].

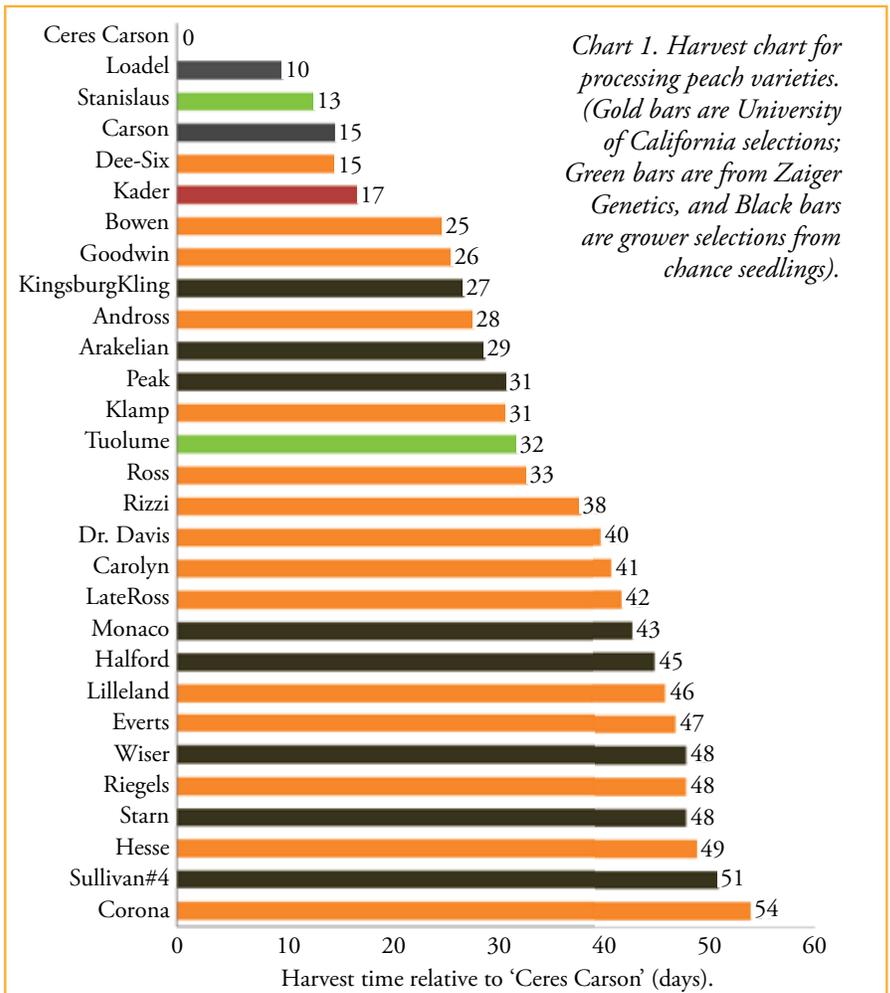


Chart 1. Harvest chart for processing peach varieties. (Gold bars are University of California selections; Green bars are from Zaiger Genetics, and Black bars are grower selections from chance seedlings).

Promoting California Canned Peaches Around the World

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Through the MAP program, the CCPB engages in a large variety of promotional activities that would not be otherwise possible.

position as the largest importer of California canned peaches during the 2013/14 marketing year.

The CCPB promotional program in Mexico consists of two components; supporting the wholesale market and the retail sector. Each component of the program leverages California's reputation for high food safety standards and consistency. While canned peaches are very popular among Mexican consumers, several house-hold brands originating from Chile dominate market share. Collectively, La Costena, Herdez, and Clemente Jacques represent 85% of market share.

To combat the stiff competition, the CCPB supports Mexican wholesalers by sponsoring regular sampling events. Furthermore, the CCPB develops and distributes point of sale materials and marketing collateral (giveaways) to key California canned peach wholesalers. Unlike Canadians, Mexican consumers enjoy cooking at home with canned peaches. Through the development and distribution of recipes, the CCPB is maximizing their exposure to consumers and key retailers in this market.

In addition to supporting wholesalers, the CCPB organizes several in-store sampling events with retailers such as H.E.B. and Walmart. Through these events, consumers sample California peaches at the point of sale, building confidence in the quality and taste. In addition, the CCPB sponsors sales contests for retail staff, offering prizes for those stores who sell the greatest volume of California cling peaches.

Through the MAP program, the CCPB engages in a large variety of promotional activities that would not be otherwise possible. In-country representatives provide regular reports on market conditions that assist not only the CCPB in developing promotions, but also the processors, brokers, and wholesalers to sell more product. Moving forward, the CCPB export marketing program will continue to seek feedback from the industry to maintain a focused and effective program. Messaging will continue to feature the high quality, taste, and nutritional content of California grown cling peaches both in Canada and in Mexico. 🍑



New Processing Peach Selections in the Dixon-Andross Gap.

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aggressively as *Andross* and *Kader*, being more comparable to *Carson* and *Dixon*. Multiyear disease evaluations by Dr. Rick Bostock at UCD have shown significantly better resistance than *Andross* or *Carson*, though not as good as *Kader* and *Early#6*. Early, small-scale test-plantings in the Sacramento and San Joaquin Valleys have received high marks from both growers and processors with more extensive regional testing planned.

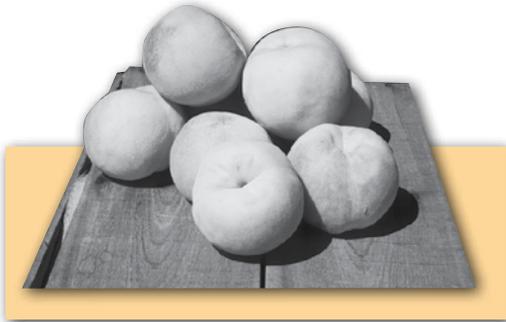
Growers interested in planting the *Kader* variety should contact their nursery as it is now fully-released and commercially available. Growers interested in establishing test plantings of *Early#5* or *Early#6* should contact Ajayab Dhaddey, in the Association's Yuba City field office (530) 673-8526 or the UCD processing peach breeding program (Tom Gradziel, TMGradziel@UCDavis.Edu, Cell: (530) 400-9292). 🍑

Keynote Speaker - 93rd Annual Meeting

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adjudicate your right to pump groundwater in future years. The current litigation process takes anywhere from 15-30 years depending on how many players and a huge amount of cost and agony in the process. So, there is a need to clean up these procedures.

The year 2015 is going to be a challenging year, like 2014 was, because it is likely the drought is going to continue and there are going to be just as many policy questions coming out as there were last year. One



Grower Profile

Continued from page 5

Eldest son Mark is in charge of pest control and fertilizer management. "I'm also interested in propagation and genetics," he said. "Two years ago, I made 500-600 trees, mostly almonds, and I made about 150 grafted grapevines."

Derek manages irrigation and farm-safety compliance. "I'd like to farm as long as I can and I'm hoping to buy ground for myself and farm it in the future. I've been involved since I was a little boy. My brothers and I always loved going to work with Dad. It was something really cool that we did. It was the same thing for my dad—he went to work with his dad. It was passed down—it's a family tradition."

Kyle is in charge of mechanics. "I pretty much knew that I wanted to be a farmer since kindergarten. As a little kid, I always wanted to figure out how things worked, and I

of the things I say to encourage people is, there are a lot of folks like me who are fully engaged in the discussions – people who are a part of the water infrastructure. In the law business we refer to ourselves as the hydraulic brotherhood, but it is time for some real parties and interests, real farmers and people who are on the ground making decisions every day about how they use their water supplies, to get engaged in this process in a much more active way.

I encourage individual farmers and the state's Ag organizations to escalate your game and stay actively involved as the State's groundwater regulatory apparatus is put in place. It is the only way to assure that groundwater rights for farmers will be preserved in the coming years. Thanks for the opportunity to visit with you this afternoon. 🍑

The year 2015 is going to be a challenging year, like 2014 was, because it is likely the drought is going to continue and there are going to be just as many policy questions coming out as there were last year.



Cindy & Jeff Cederlind.

enjoyed hanging out with Grandpa. Today, I'm the mechanic in the family. I work on the tractors and all the farm equipment, especially during the grape harvest, keeping the harvester going—I'm on call at night. And I'm in charge of fixing and servicing and moving the equipment during the day." His mechanical aptitude is not limited to farming. Earlier this year, Kyle also worked on a car, truck and RV for the Stanislaus County Fair destruction derby.

It's clear that Mark, Derek and Kyle intend to carry on the family farming tradition, and the youngest Cederlinds can rightfully claim to be third-generation peach growers in California. 🍑



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