

**NATIONAL PROCESSED RASPBERRY COUNCIL
Industry Relations Committee Conference Call
January 24, 2018; 9:00 a.m.**

Committee Members Participating:

<input checked="" type="checkbox"/> Henry Bierlink	<input checked="" type="checkbox"/> Julie Schedeen	<input type="checkbox"/> Antonio Dominguez
<input checked="" type="checkbox"/> Loren Kimura	<input checked="" type="checkbox"/> Rolf Haugen	<input type="checkbox"/> Brad Rader
<input checked="" type="checkbox"/> Richard Rubin	<input type="checkbox"/> Jonny Paris	

Others Participating:

<input checked="" type="checkbox"/> Tom Krugman	<input checked="" type="checkbox"/> Hakim Fobia	<input checked="" type="checkbox"/> John Clark
<input checked="" type="checkbox"/> Allison Beadle	<input checked="" type="checkbox"/> Corey Havard	

x = present o = absent

A. Call to Order; Establish Quorum

The meeting was called to order by Richard at 9:05 a.m. A quorum was established. Tom presented minutes from the November 27, 2017 meeting, noting amended language from that which had originally been sent to the committee. The addition was to recognize discussion regarding the inability of the Council to set or establish pricing, and its responsibility to create an environment conducive to demand growth. On a motion by Henry and seconded by Loren, minutes as amended were unanimously approved.

B. Market Data Review

Richard asked Tom to review the presentation on market data. Tom said that the purpose of the presentation was to answer questions that had previously been raised and to provide context for general discussion on market trends. Data trends reviewed included production by state, imports by country, total U.S. market share, cold storage inventories, and per capita consumption. Discussion requested a slide comparing fresh vs. frozen per capita consumption. Loren asked about the change in per capita consumption beginning in 2014. Richard suggested it was part of an overall trend of increased berry consumption. Other discussion pointed to the beginning of the Council's market education program becoming active in 2014.

Question was raised as to the volume of mixed berry blends containing raspberries entering the U.S. Tom suggested an HTS code which he believed to be that for berry blends. Richard said he would investigate Canadian HTS codes and see if there was a description that was appropriate so that these imports could be tracked as well. Corey indicated most IQF sales are going into berry blends and this is the fastest growing category with blends produced in Canada dominating the market.

Discussion then turned to the collection of data from domestic first handlers on product types, noting that at this time, only total volume processed is available. Loren believed that having this information would be useful to accurately track the size of the market by product. Hakim noted that data collection could be voluntary or added to the assessment self-reporting form. In either instance, data would need to be aggregated prior to presentation. Committee consensus was that this information would be useful, and that if voluntarily collected, only be distributed to those that had responded to the Council's request.

A voluntary supplier's list was discussed as an additional tool that would be helpful to the marketing team. Loren noted the frequency of requests for a supplier's list and suggested it should be in the form of a searchable database. Publication would be on the Council's website. Rolf was not in favor of creating a list as he felt it would be detrimental to domestic industry interests. Hakim responded by recognizing that the Council's role is to support the entire industry not only one part. Inclusion on the list would be voluntary, with an annual update. It was stated that much of the information is already available, and a published list like that used by other industries would put it in one place to answer potential buyer's questions.

Richard then asked the committee about non-financial measures of success. He said that increasing per capita consumption seemed relevant but questioned whether it was a market success or one that translated and was meaningful to growers. Julie asked whether there was any correlation to the decline in Canadian imports, or if it was a function of a shift to berry blends. Henry also raised a question regarding Canadian imports noting that there was a decline in production as well a shift to berry blends for IQF raspberries. He also said there was a sense in the industry that total import volume from Canada was not decreasing. There was agreement that import volume from Canada needed to be reconciled. Julie also questioned data on California processed raspberry supply with reports indicating volume was much greater than being reflected in the review as presented. Tom noted that California volume was as reported from first handler reports. There was brief discussion on the data discrepancy for California processed raspberry volume. Discussion concluded with a consensus that more accurate and realistic data for Californian production and total Canadian imports including berry blends were key pieces of missing data.

C. Adjourn; next meeting

Committee members agreed that the next conference call would be February 26, 2018 at 9:00 a.m. (pacific) to continue the discussion on market scope and appropriate measures of success. There then being no further business, the call was adjourned at 10:15 a.m. by Richard.