

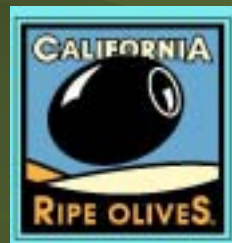
# **The California Olive Industry Today**

**Christi Darling, Interim Manager  
California Olive Committee**



# CALIFORNIA OLIVE COMMITTEE

- *What has the market been doing?*
- *Where are we going as an industry?*
- *What kind of Research projects are we focusing on this year?*
- *Exciting news regarding our Marketing program for 2006!*



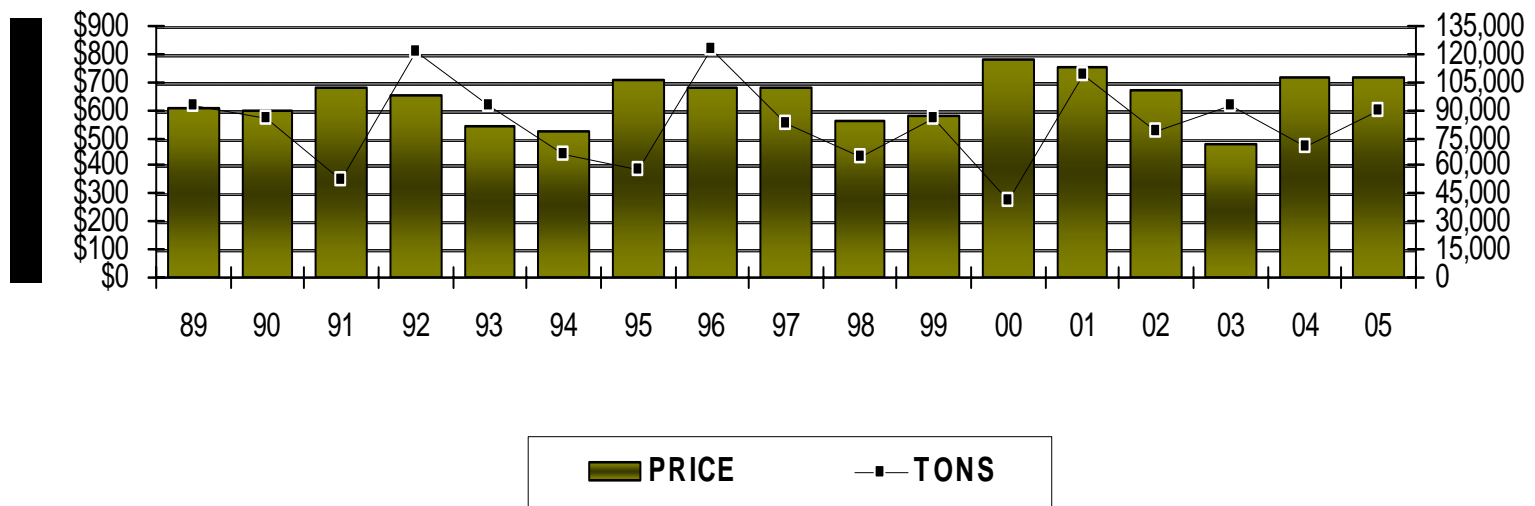
# CALIFORNIA OLIVE COMMITTEE

## Combined Variety Canning Tons & Grower Prices ~

for 2005 Total Combined Tons= 89,958  
Average Ton Value= \$715

Source: OGC

### OLIVE GROWER PRICES & DELIVERIES (CANNING TONS)



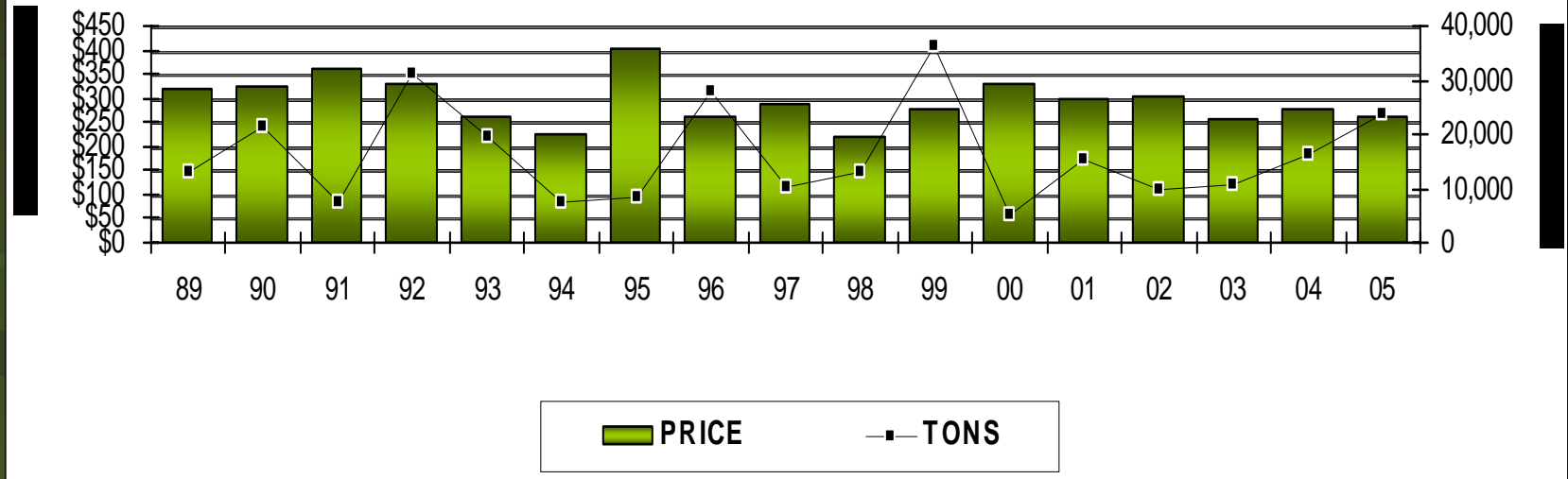
# CALIFORNIA OLIVE COMMITTEE

## *Limited Tons & Average Limited Ton Values ~*

*for 2005 Total Combined Tons= 23,794    Average Price= \$261*

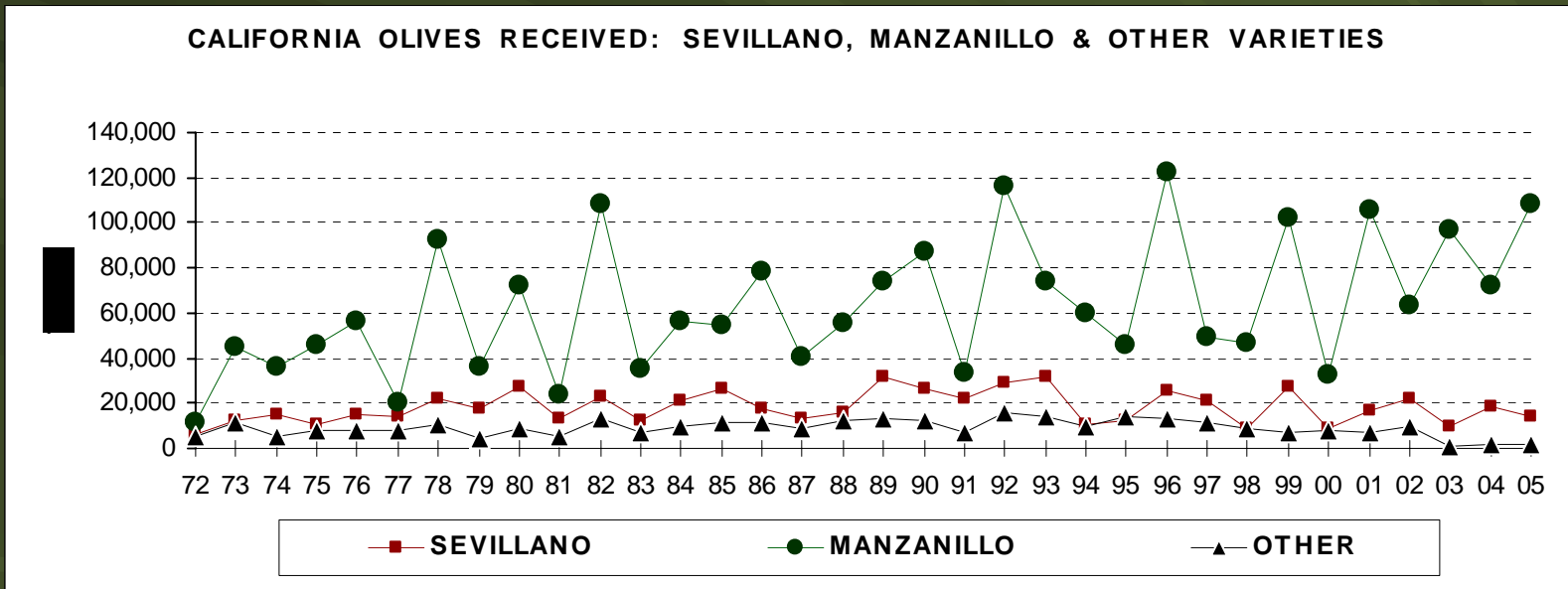
*Source: OGC*

### OLIVE GROWER PRICES & DELIVERIES (LIMITED TONS)



# California Weekly Olive Receipts Report in 2005: Sevillano variety ~ 13,795 Manzanillo variety ~108,291 Other varieties combined ~ 1,503

for a total of 123,589 tons for 2005

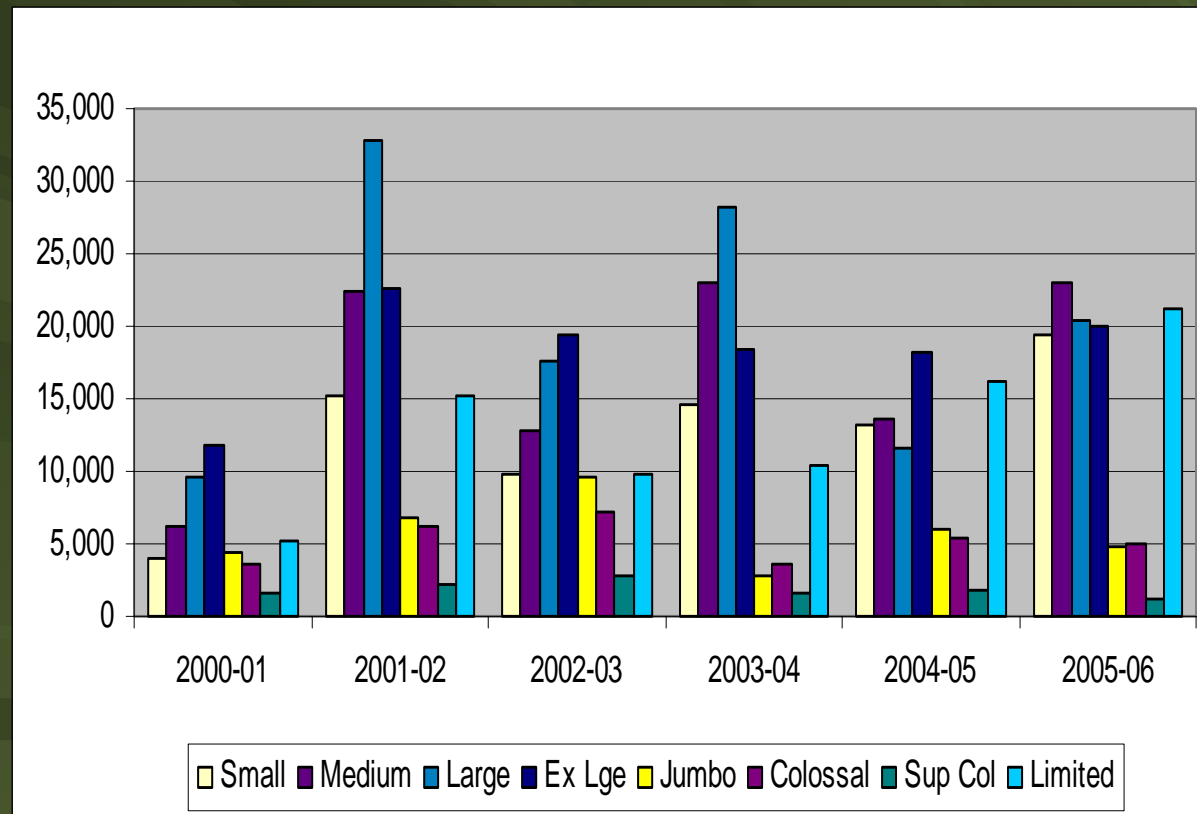


Source: COC-19's/ Annual Stat Book (Pg 22) /CASS

# CALIFORNIA OLIVE COMMITTEE

## Grower Deliveries to Handlers by Size Grade IN TONS

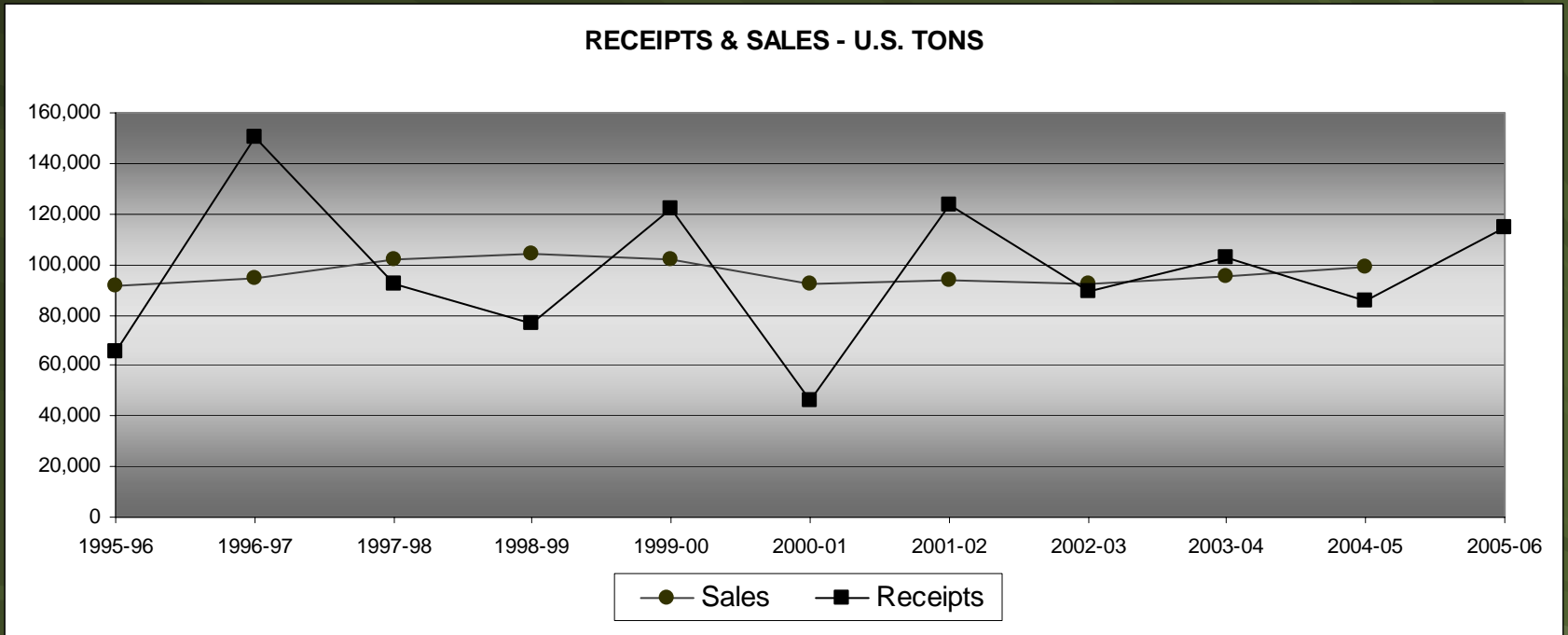
Source: COC-19's /Annual Statistical Book (Pg 24) /CASS



# CALIFORNIA OLIVE COMMITTEE

*Canning and Limited ~ combined*

*Based on COC-19's received, and Sales Reported*



*10 year average Receipts = 100,372 Tons*

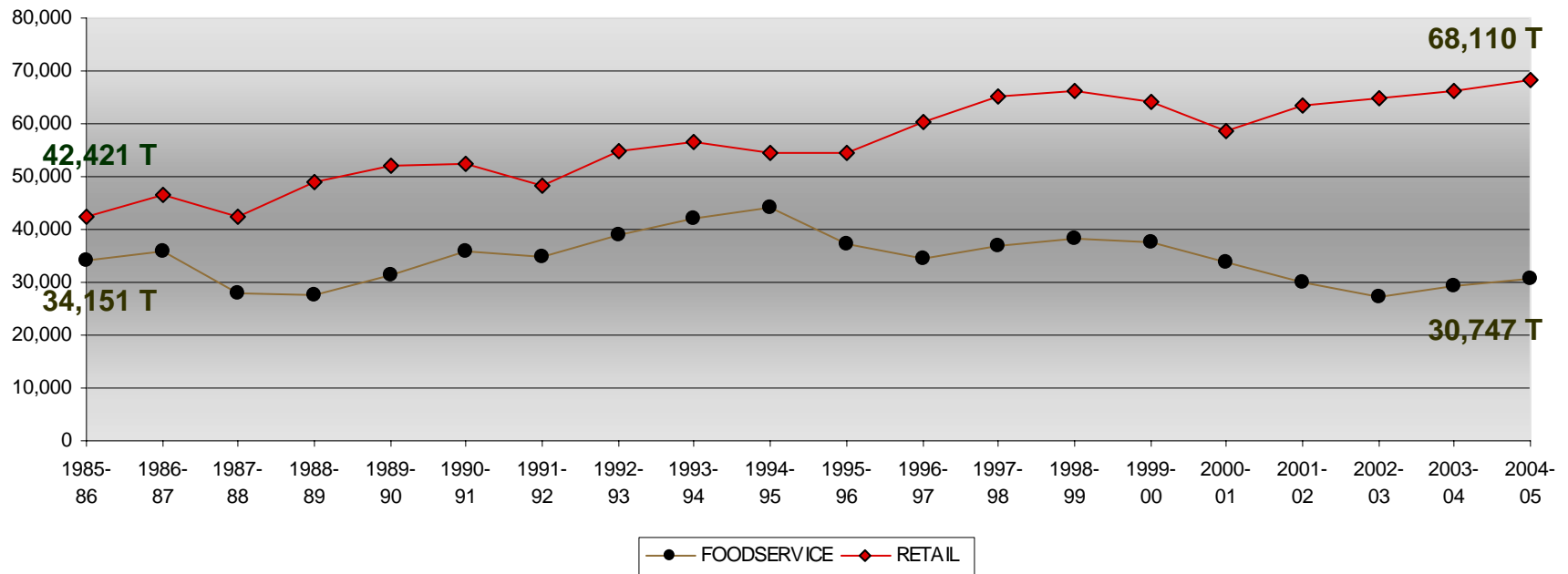
*10 year average Sales = 96,759 Tons*

# CALIFORNIA OLIVE COMMITTEE

*Canning and Limited ~ combined*

*Over 20 year period ~*

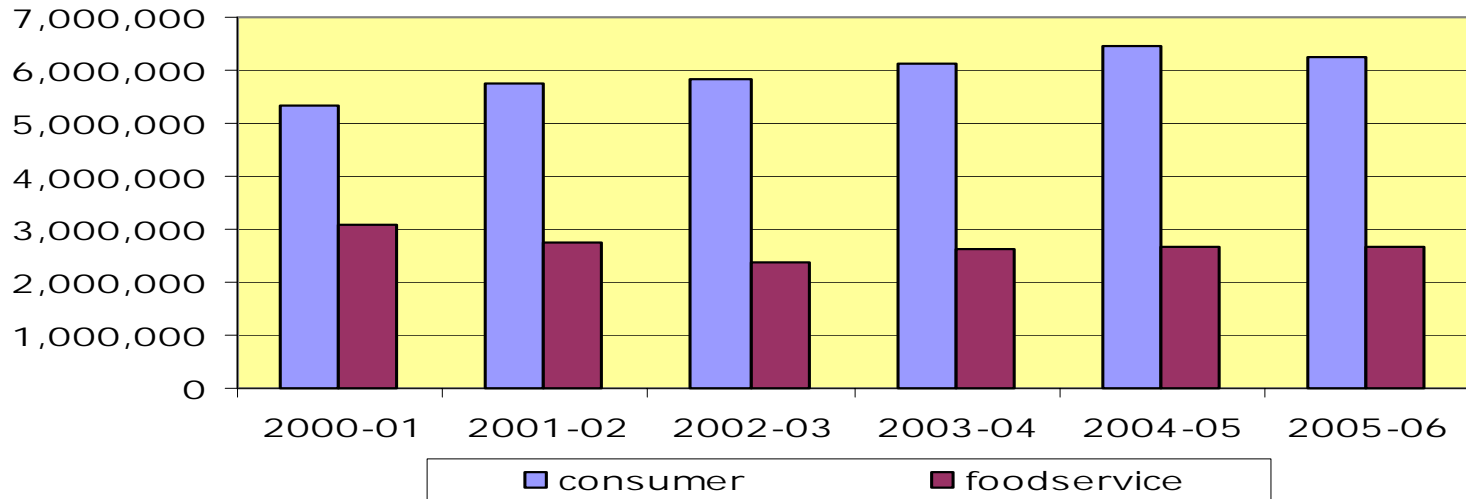
**ANNUAL DOMESTIC SALES - U.S. TONS**



# CALIFORNIA OLIVE COMMITTEE

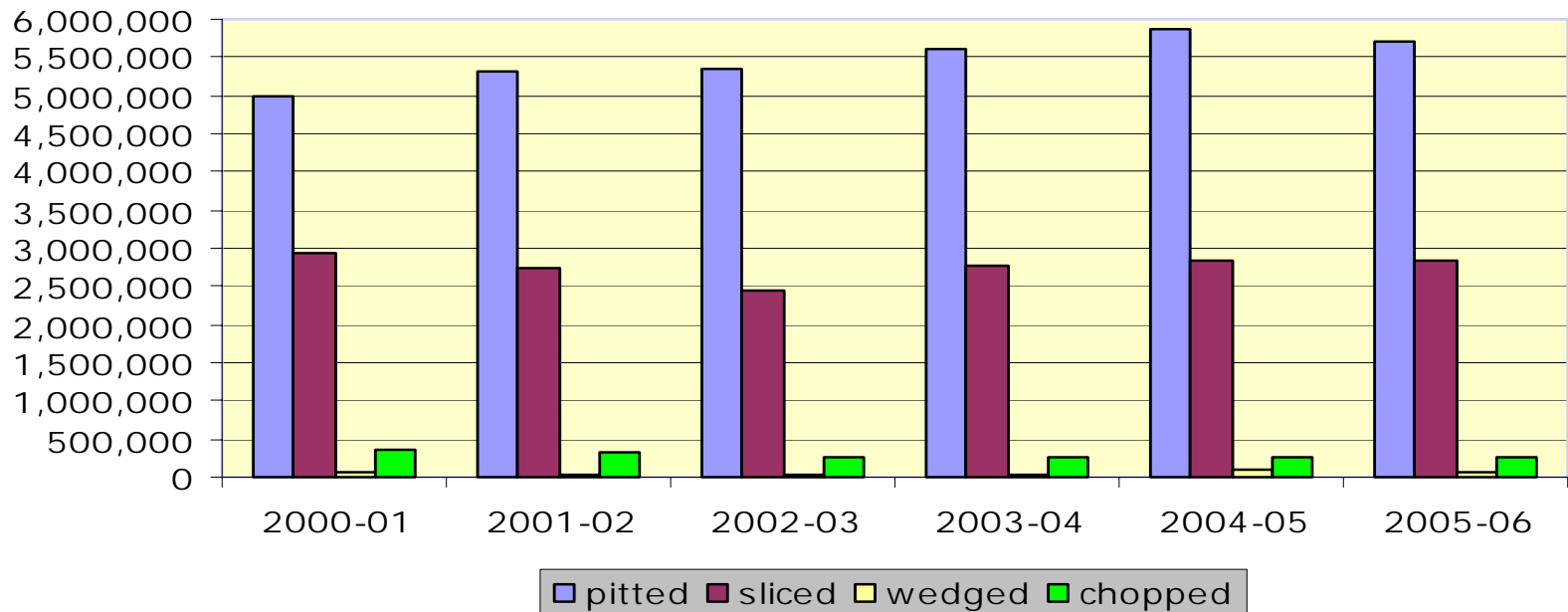
*Canning & Limited ~ combined*

## **RIPE OLIVE SALES** **7 Months: August-February** converted into 24/300 case basis



# CALIFORNIA OLIVE COMMITTEE

## RIPE OLIVE SALES 7 Months: August-February converted into 24/300 case basis



# CALIFORNIA OLIVE COMMITTEE

Source: COC/CASS

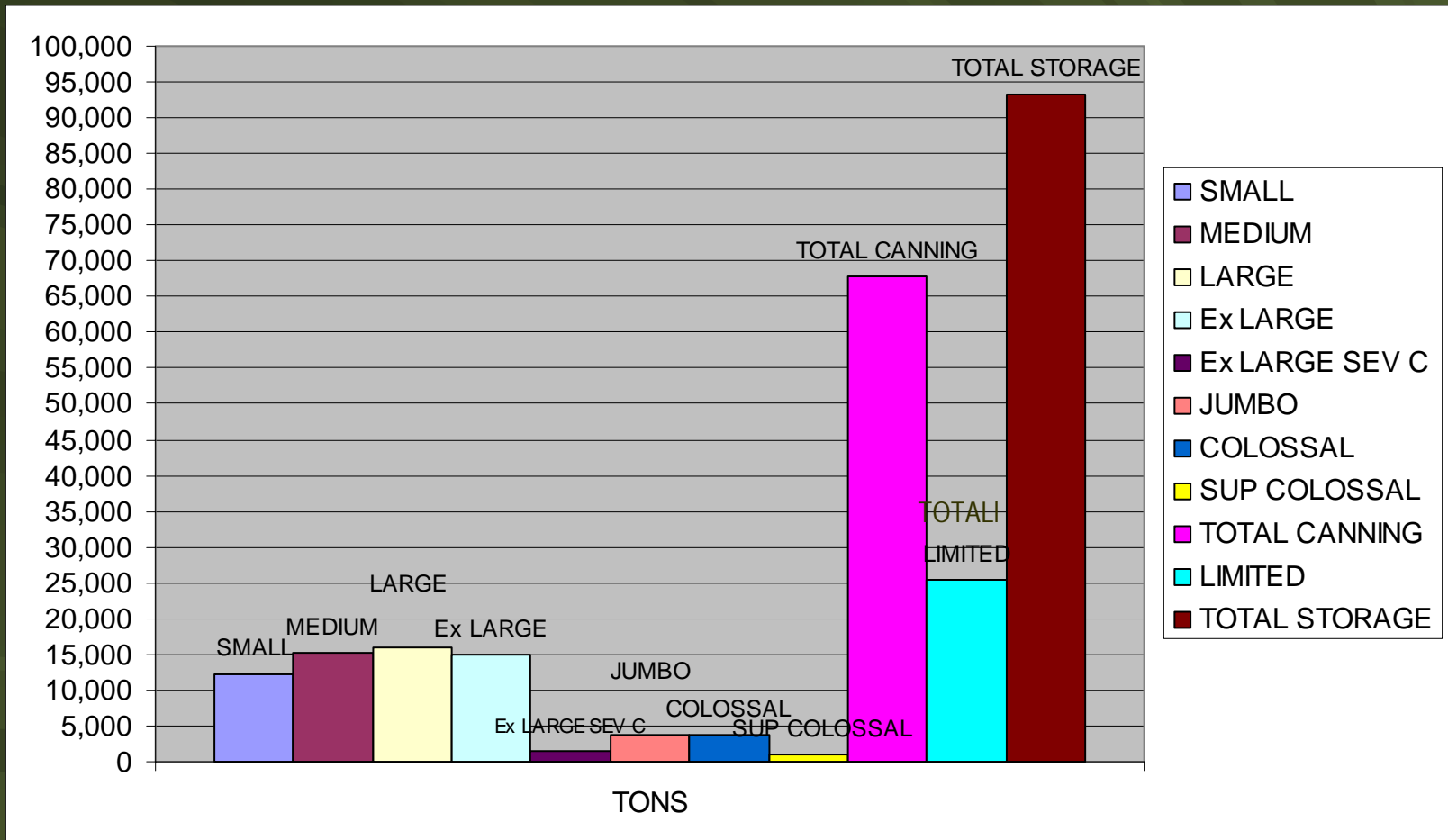
Raw Storage in Tanks as of February 28, 2006

*Whole Canning Sizes*

SIZE	TONS	CONV 24/300s
SMALL	12,175.72	1,887,237
MEDIUM	15,191.35	2,354,659
LARGE	15,843.97	2,455,815
Ex LARGE	14,869.46	2,304,766
Ex LARGE SEV C	1,410.02	218,553
JUMBO	3,828.98	593,492
COLOSSAL	3,634.66	563,372
SUP COLOSSAL	940.95	145,847
<b>TOTAL CANNING</b>	<b>67,895.11</b>	<b>10,523,742</b>
LIMITED	25,376.64	3,933,379
<b>TOTAL STORAGE</b>	<b>93,271.75</b>	<b>14,457,121</b>

# CALIFORNIA OLIVE COMMITTEE

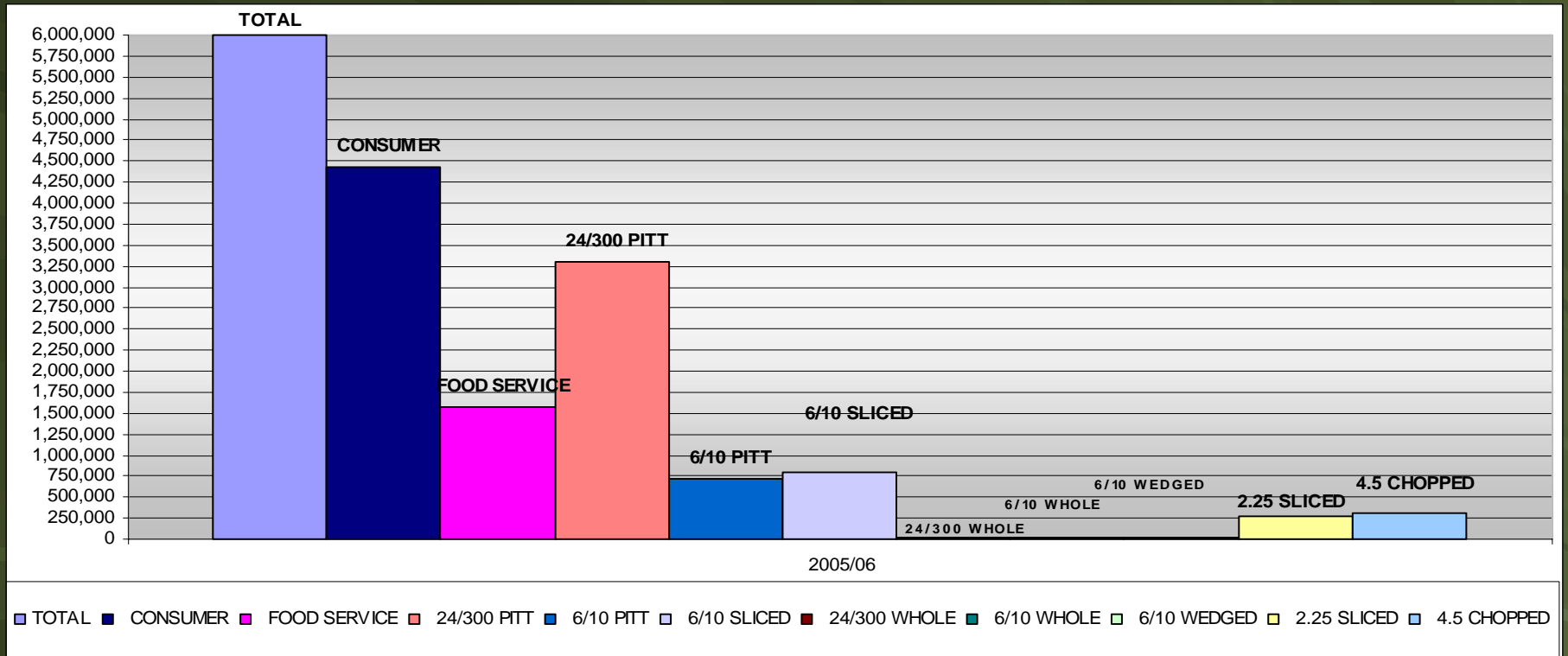
## Raw Storage in Tanks as of Feb 28, 2006 in Tons



ITEM	Ending Inventory as of Feb 28, 06 in converted 24/300 case basis		
	2005/06	2004/05	% CHANGE
TOTAL	5,997,074	6,307,639	-4.92
MARKETS ~			
CONSUMER	4,430,380	4,361,832	1.57
FOOD SERVICE	1,566,694	1,945,806	-19.48
STYLES ~			
WHOLE	28,162	38,370	-26.60
PITTED	4,077,641	4,255,618	-4.18
WEDGED	15,670	20,860	-24.88
SLICED	1,435,444	1,639,074	-12.42
CHOPPED	328,879	249,516	31.81
BROKEN PITT	111,278	104,200	6.79
KEY ITEMS ~			
24/300 PITT	3,306,873	3,433,865	-3.70
6/10 PITT	717,533	790,540	-9.24
6/10 SLICED	801,353	1,073,270	-25.34
24/300 WHOLE	15,665	21,973	-28.71
6/10 WHOLE	12,444	16,059	-22.51
6/10 WEDGED	14,886	20,435	-27.15
2.25 SLICED	266,202	274,513	-3.03
4.5 CHOPPED	305,534	197,124	55.00

# CALIFORNIA OLIVE COMMITTEE

Includes ~ Total Inventory= Total Consumer Inventory, Total FoodService Inventory  
 Then broken down into Key Items ~  
 converted into 24/300 case basis



# CALIFORNIA OLIVE COMMITTEE

As of February 28, 06

Our industry's approximate supply in converted 24/300 case size

<b>TOTAL INVENTORY</b>	5,997,074
<b>CONVERTED STORAGE</b>	14,457,121
<b>APPROXIMATE SUPPLY</b>	20,454,195

# CALIFORNIA OLIVE COMMITTEE

*Table Olive Acreage by County & Variety*

	COLUSA	FRESNO	GLENN	KERN	MADERA	SHASTA	TEHAMA	TULARE	TOTAL
<b>Manzanillo</b>	22	883	3,533	378	1,182	37	3,509	16,404	25,948
<b>Sevillano</b>		33	938	17	179	147	2,906	673	4,893
<b>Mission</b>		10	22			46	348	17	443
<b>Barouni</b>						42		24	66
<b>Ascolano</b>			47		37		106	37	227
<b>Obliza</b>								3	3
<b>TOTAL</b>	22	926	4,540	395	1,398	272	6,869	17,158	31,580
<b>Percent</b>	0.1%	2.9%	14.4%	1.3%	4.4%	0.9%	21.8%	54.3%	

*Based on 2004 Regulated Table Olive Handlers Only*

*Source: Annual Statistical Book 2004/2005*

*Last reported March 2005*

# COC Research Sub-Committee Proposals Approved for December 13<sup>th</sup> 2005 Annual Meeting for 2006

## 2006 Research Grant Proposals

<b>Project Leader</b>	<b>Project Title</b>	<b>Duration</b>	<b>Budget Proposal</b>	<b>Roll-over?</b>	<b>Approved</b>
Daane, K. & Johnson, M.; Opp, S.; Patterson- K. L.	<u>Predicting Climate Induced Olive Fly Death in the Central valley</u>	(Year 2)	~ \$39,136		
Daane, K. & Johnson, M.	<u>Quarantine Screening and Selection of Imported Natural Enemies of Olive Fly</u>	(2 years-new)	~ \$25,909		
Zalom, F. & Connell, J.; Burrack H.	<u>Bait Spray Treatment Timing for Olive Fruit Fly Control</u>	(1 year –new)	~\$14,758		
Rosa, U. & Ferguson, L.; Smith, D.	<u>Damage Assessment of CA Table Olives Mechanically Harvested</u>	(3 years-new)	~\$33,000		
Smith, D.	<u>Redesign of the Mechanical Olive Harvester</u>	(2 years-new)	~\$45,000		
Burns, J. & Crisosto, C.; Glozer, K.; Ferguson, L.	<u>Facilitating Olive Mechanical Harvest with Abscission Materials</u>	(1 year-new)	~\$22,000		
Zalom, F. & Krueger, W.; Connell, J.; Burrack, H.	<u>Post-Harvest Techniques of Olive Fly Control</u>	<i>(this is a roll-over from 2005 monies set aside)</i>	~ \$7,250		
Yokoyama, V. & Miller, G.	<u>Development of Control Strategies for Olive Fruit Fly</u>	<i>(this is a roll-over from 2004's monies set aside)</i>	~ \$52,000		



# Overview of COI's Marketing Program for 2006

*Vittles*

# Current Programs

- Public Relations
- Website
- Retro-designed Postcard recipe packet
- Elementary School educator packets
- Cookbook chapter for diabetics
- Sonoma Diet co-promotions

# Recipe Postcard Packet

When's a cookbook more than a cookbook?

- 16 recipes
- Strong California branding
- Nutritional messages
- PR appeal

35,000 distributed in '05

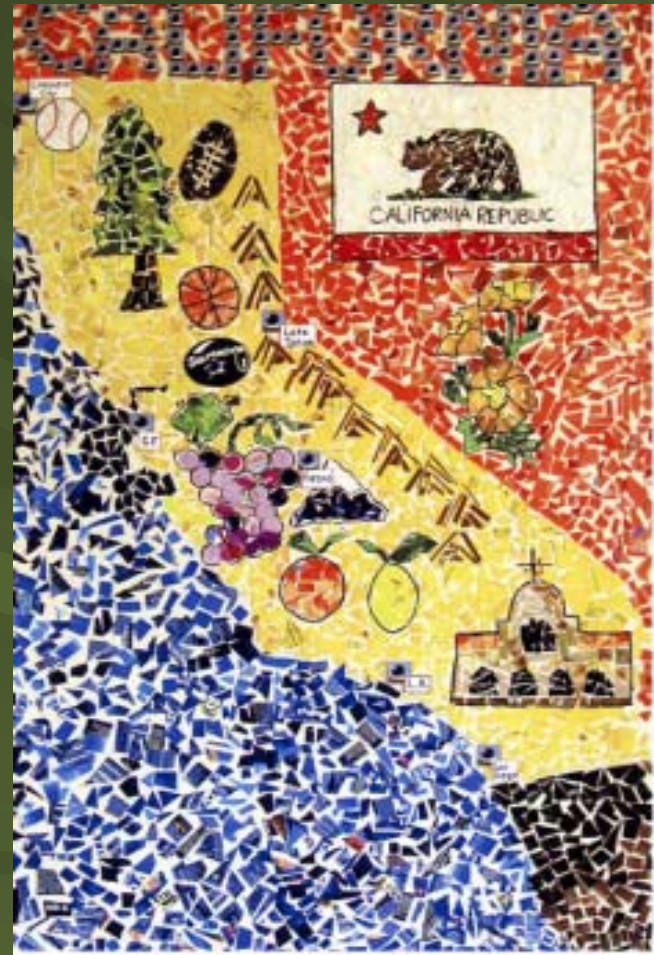
Reordered for '06

Over 5,000 requests shipped already in April



# Education Programs

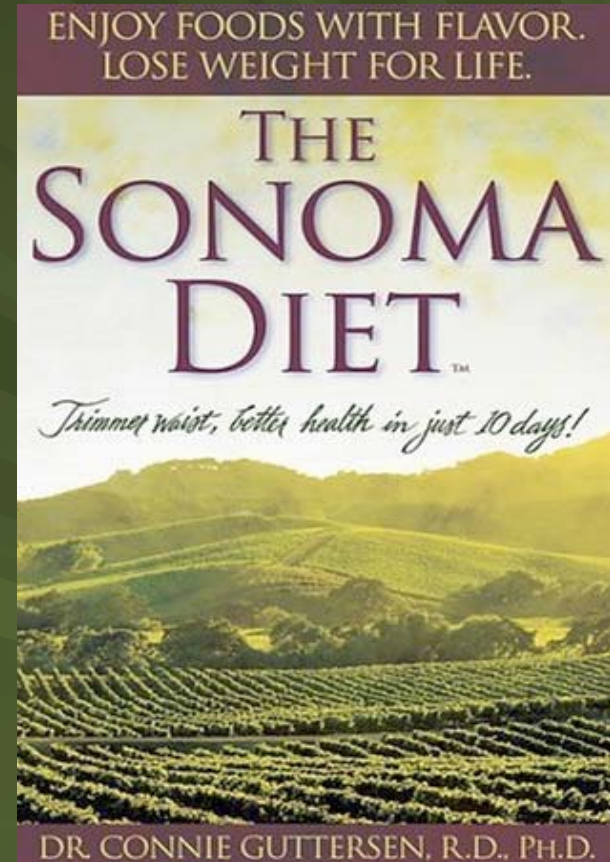
- Reaching Kids
  - 15,000 classrooms
    - Study Guides
    - Activity Sheets
    - Web downloads
    - Oliville
    - Stickers
    - Art Program





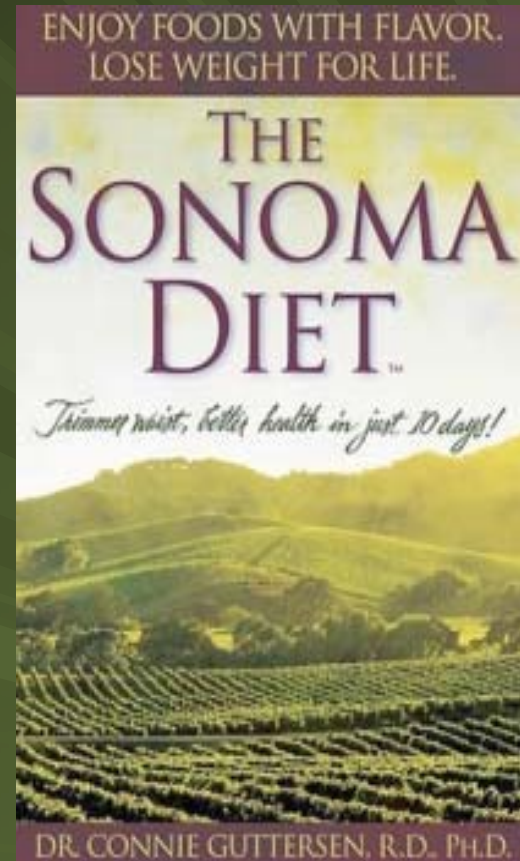
# Sonoma Diet Co-promotion

- Author is COI website writer/nutritionist.
- Better Homes & Gardens hired her.
- 400,000 advance book orders.
- Best seller list
- Launched in January.
- PR bonanza



# Sonoma Diet Promotions

- \$5 million promotional budget by BH&G.
- Book publicity program includes olive recipes.
- 200-store national supermarket promotion.
- Sonoma Diet “shopping list” in Better Homes & Gardens ad.
- Sonoma Diet “shopping list” distributed at 200 stores.
- California Ripe Olive ad in Better Homes & Gardens.
- California Ripe Olives linked on Sonoma Diet website.
- TV appearances, radio interviews, book signings.



# Better Homes & Gardens shopping list

**THE SONOMA DIET**

Look for these delicious foods that are approved for **THE SONOMA DIET**

**Barilla PLUS Multigrain Pasta**  
is a good source of fiber, protein and omega-3, and has a taste your family will love. Visit [www.barilla.com](http://www.barilla.com) for great recipe ideas.

**Peppertree Farm**  
Whole Grain Breads are fresh, soft and taste amazingly delicious. Visit the Peppertree Farm website at [www.peppertree.com](http://www.peppertree.com)

**Peppertree Farm 100% Whole Wheat Mini Bagels**  
Whole Grain Bagels that have 100 calories. They are fresh, nutritious, and most importantly delicious.

**California Ripe Olives**  
Only 6 calories per large olive, California Ripe Olives have heart-healthy monounsaturated fat, are cholesterol and sodium free. Perfect for snacking and adding healthy flavor to dishes.

[www.sonomadiet.com](http://www.sonomadiet.com)

# COI ad in BHG

**The culinary  
little black dress.**



Always in good taste. And at just 6 calories, no trans fat and no cholesterol, it may just help you fit into yours. Plus, for foodie fashionistas we're offering 18 free retro art/recipe postcards, at [www.calolive.org/bhg](http://www.calolive.org/bhg).



# Olive Coupon in 200 stores

**Save \$1 on three cans of  
California Ripe Olives.**



Save \$1 when you purchase 3 six ounce cans  
of any brand of California Black Ripe Olives.

**The culinary little black dress.**



Always in good taste. And at just 6 calories, no  
trans fat and no cholesterol, it may just help  
you fit into yours. Plus, for foodie fashionistas,  
we're offering 18 free retro art/recipe postcards,  
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*For more recipes, nutritional information and more,  
visit us at [www.CalOlive.org](http://www.CalOlive.org)*



*Thank you !*

*Vittles*