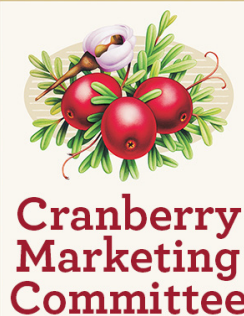


# March 2021 Cranberry News



## CRANBERRY MARKETING COMMITTEE HOSTS 2021 ANNUAL WINTER MEETING VIRTUALLY



The cranberry industry once again gathered virtually via a Zoom webinar for the CMC's annual winter meeting February 10, 2021. The condensed meeting included brief presentations of agenda items and corresponding question-and-answer periods.

George Rogers presented the CY20 first quarter production and sales numbers (pg. 6). The Committee also went through its process of estimating 2021 U.S. production, which is expected to be 8,754,000 bbls. See page 2 for the 2021-2022 Marketing Policy.

Karen Cahill presented an update on domestic marketing activities (pg.4). Matt Lantz of BCI went over the challenging process of establishing MRLs in the EU and addressed several key trade policy updates (pg. 3). Sarah Gelpi updated the Committee on how the global pandemic has impacted the CMC's marketing programs in China and India. (pg. 5).

Several industry groups updated the Committee on their recent happenings (pg. 7).

The Committee voted to spend \$100,000 on domestic promotion of the *H. pylori* clinical study (front cover) and \$170,000 on a five-year strategic plan (see below).

*To download February 2021 Meeting materials, including recorded presentations, visit [uscranberries.com](http://uscranberries.com) and scroll down to Web Resources*

## COMMITTEE VOTES TO PROCEED WITH VOLITION PARTNERS FOR STRATEGIC PLANNING

During its annual February meeting, the Committee voted unanimously to move forward with a 5-year strategic plan proposal submitted by Volition Partners. The company's main areas of expertise include developing strategy, organizational design, culture and common purpose. Volition recently worked with the Cranberry Institute on its strategic plan and the company came highly recommended by several industry members.

The three-phase plan will involve wide industry input and is expected to be completed by the August 2021 Committee meeting.

### ***Phase 1: Discovery and Assessment***

*Timing: February-March*

During phase 1, Volition will "level set" needs and expectations of the group through a research and discovery process that will include:

- Review of past/current strategic plans and other relevant reports

and materials that have guided the CMC's past activities, including interviews and discussion with CMC leadership.

- A quantitative survey of industry stakeholders (~50) to ensure all representative voices have been heard and assess which issues and opportunities are of greatest importance to stakeholders.
- One-on-one interviews with up to 20 board members and/or critical industry experts and constituents to assess opportunities, concerns and priorities from each of their perspectives. These will be a mix of informal/open-ended listening sessions combined with guided discovery questions to gain insights on a list of specific questions and issues.
- The interviews and survey will tackle macro-level industry trends and challenges as well as specific

perspectives on the past and future role of the CMC.

Phase 1 key deliverables:

- Qualitative interview guide developed in consultation with CMC leadership.
- Survey creation and deployment, developed in consultation with CMC leadership.
- Coordination and facilitation of all interviews (to be done individually via video-conference).
- A detailed insights and findings report/presentation derived from provided documents and available third-party research, the quantitative survey and 1:1 interviews. This report may be delivered as a written document for distribution and also presented the CMC leadership or full board in a 90-120 minute video conference presentation, as requested.

*continued on page 7*

# CRANBERRY MARKETING COMMITTEE 2021 CROP YEAR ESTIMATE

## 2021 Domestic Cranberry Production Estimate Updated 2/10/2021

1,000 barrels	
Massachusetts	2,034
New Jersey	530
Wisconsin	5,293
Oregon	500
Washington	188
2020 Domestic Production Estimate	8,545

## 2021 Crop Year Marketing Policy (9/01/2021 - 8/31/2022) Updated 2/10/2021

1,000 Barrels		
1	Estimated Carry-In	4,275
	<i>Production &amp; Acquired</i>	
2	Estimated Domestic Production	8,545
3	Estimated Foreign Acquired	1,925
4	Total Production & Acquisitions (2+3)	10,469
5	Available Supply (1+4)	14,745
	<i>Estimated Shrinkage</i>	
6	2% of Carry-in (1)	86
7	4% Estimated Production/Acquisitions (4)	419
8	Estimated Shrinkage	350
9	Adjusted Supply (5-8)	14,395
	<i>Sales &amp; Usage</i>	
10	Fresh Fruit Sales	334
11	Processing Fruit Usage	9,880
12	Total Sales/Usage (10+11)	10,214
13	Estimated Adjusted Carry-Over	4,180
14	Inventory as a % of sales	40%

→ From 'Total Available Supply and Sales', may be adjusted based on Committee input

→ From Committee estimates

→ From Committee estimates

→ Sum of Estimated Domestic Production and Estimated Foreign Acquired

→ Sum of Total Production & Acquisitions and Estimated Carry-in

→ 2% of Estimated Carry-In

→ 4% of Total Production & Acquisitions

→ Committee Estimate

→ Estimated Shrinkage deducted from Available Supply

→ From Committee estimates

→ From Committee estimates

→ Sum of Fresh Fruit Sales and Processing Fruit Usage

→ Total Sales/Usage deducted from Adjusted Supply

# EUROPEAN UNION PESTICIDE POLICY REMAINS A CHALLENGE FOR CRANBERRY INDUSTRY

At the CMC's annual winter meeting, Matt Lantz of Bryant Christie, Inc., highlighted the difference of establishing MRLs in the European Union versus the rest of the world. The EU pesticide policy is based on a hazard-based methodology. This policy has greatly affected the approval of crop protection substances within the European Union and often its corresponding MRLs. The EU has committed to reducing pesticides by 50% by 2030, which is impacting industries all around the world.

An example of how the EU's policies effect the cranberry industry would be how the industry has sought Quinclorac in the EU for 9 years. The data was good enough to establish MRLs in the US, Canada, Australia, Taiwan, Korea, and China (notoriously difficult to get MRLs), but not good enough for the EU.

Another example would be the loss of Bravo in 2014, but the return 18 months later after a data package was submitted.

After five years of no issues based on risk not hazard, the EU found health concerns, and the Bravo MRL will be removed September 2, 2021. What was acceptable in the EU five years ago is no longer acceptable. Though BCI notifies the industry years in advance of MRL issues, the EU policies remain challenging.

Other pesticides to watch:

- The final decision on non-renewal concerns over health for *Mancozeb* was announced December 4, 2020 and formally published on January 4, 2021. EU growers can use it until Jan 4, 2022. Separately, the EU is conducting a risk-based MRL review. They could recommend a MRL level and then decide to withdraw it. It will be in place until at least 2022, but beyond that there is no further information.
- *Admire* was withdrawn over concerns with bees and EU

growers cannot use this product. The MRL review proposed 0.05 ppm, but this too could be banned or the EU could follow the MRL review recommendation. Information sent to stakeholders indicates that all MRLs will be withdrawn by 2022 despite the MRL review recommendations.

The cranberry industry provides data packages, comments and works with in-country registrants to try to save MRLs. The industry was engaged with the United States International Trade Commission MRL report, which comes out this month. BCI also tracks any MRL changes so the industry is not caught unaware.

Download the full winter meeting MRL and Trade Policy reports at [uscranberries.com](http://uscranberries.com) > Web Resources > Annual Meeting Materials

## 2021 TRADE POLICY UPDATE

### European Union

Duty suspensions in the European Union remain in place for cranberry concentrate through January 1, 2025, and for SDCs and frozen cranberries through January 1, 2024.

Exports of U.S. cranberry concentrate continue to be subject to an EU tariff of 25%, which was imposed in June 2018 in response to the U.S. Section 232 tariffs on steel and aluminum. This has resulted in an 86% drop in exports. The SDC tariff was delayed and should go into effect June 1, 2021, if there is no change in the system.

### United Kingdom

Free-trade talks between the US and UK have been underway since May 2020, but it is unlikely they will be completed in 2021.

### China

China has launched a domestic process through which Chinese importers can apply for a waiver of the 301 duties levied on U.S. products. The waiver does not apply to the 15% tariffs China imposed on frozen and fresh cranberries in response to the U.S. Section 232 tariffs.

## LATEST EUROPEAN UNION MRL WITHDRAWALS

In February 2021, the European Union published the decision to withdraw the MRL for chlorothalonil (Bravo) and propiconazole (Tilt):

- The established MRL for chlorothalonil (Bravo) on cranberries (0.01 ppm) is more restrictive than the US MRL (5 ppm) and will be effective on September 2, 2021. Until that date, the current MRL of 5 ppm is in effect.
- The established MRL for propiconazole (Tilt) on cranberries (0.01 ppm) is more restrictive than the US MRL (1 ppm) and will be effective on September 2, 2021. Until that date, the current MRL of 0.3 ppm is in effect.

Market	Source	Commodity	Active Ingredient	U.S. MRL	Codex MRL	Current MRL	Newly Established MRL
EU	COMMISSION REGULATION (EU) 2021/155	Cranberry	Chlorothalonil	5	Proposed: 5 15	5	{0.01}*
			Propiconazole	1	{0.3}	{0.3}	{0.01}*

\*Effective on September 2, 2021

## CMC BOARD OF DIRECTORS

August 1, 2020 - July 31, 2022

### DISTRICT 1 (MA, RI, CT)

#### *Major Cooperative*

Adrienne Mollor (Member)

George Rogers (Member)

Eric Pontiff (Alternate)

#### *Other Than Major Cooperative*

Parker Mauck (Member)

Dawn Gates-Allen (Member)

James Rezendes (Alternate)

### DISTRICT 2 (NJ)

#### *Major Cooperative*

Stephen Lee IV (Member)

John “Mike” Haines (Alternate)

#### *Other Than Major Cooperative*

Thomas Gerber (Member)

William R. Poinsett (Alternate)

### DISTRICT 3 (WI, MI, MN)

#### *Major Cooperative*

Jill Amundson (Member)

Douglas Rifleman (Member)

David Bartling (Alternate)

#### *Other Than Major Cooperative*

Suzanne Arendt (Member)

Wayne “Butch” Gardner (Member)

Vicki Nemitz (Alternate)

### DISTRICT 4 (OR, WA)

#### *Major Cooperative*

Kevin Hatton (Member)

Jack Stein (Alternate)

#### *Other Than Major Cooperative*

Nicholas Puhl (Member)

Martin “Ty” Vincent (Alternate)

### AT-LARGE

Andreas Welsch (Member)

Christopher O’Connor (Alternate)

### PUBLIC

Steven White, Ph.D. (Member)

Thomas O’Guinn, Ph.D. (Alternate)

### CMC OFFICE STAFF

Michelle Hogan, *Executive Director*

Karen Cahill, *Marketing Director*

Dotty Pipher, *Senior Executive Assistant*

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Super versatile.

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Superfruit®



## CMC DOMESTIC MARKETING PARTNERSHIPS UPDATE

Since the August 2020 Committee meeting, the CMC has executed two successful retail partnerships, expanded its social media presence, and communicated regularly with both consumers and industry members on a variety of cranberry-related issues.

The CMC’s Produce Pairing partnership with California Walnuts facilitated by Produce for Better Health went off as planned in September. Cranberries and walnuts were featured in Weis Markets (a mid-Atlantic supermarket chain) from August 27 – September 30, 2020. The partnership included a Facebook Live segment on September 12, during which Dawn Gates-Allen explained the cranberry growing process and fielded questions. Weis Market dietitians also hosted a Facebook Live segment demonstrating the execution of a Walnut and Cranberry Energy Bite recipe. Both live segments reached more than 20,000 viewers. The promotion also incorporated: a media segment on PA Live on September 3, which reached more than 16,000 viewers; several online cooking classes featuring cranberries and walnut recipes; and an e-blast to the Weis Market shopper mailing list. This promotion resulted in a 37% sales lift and a 207% volume lift of dried cranberries across Weis Markets when compared to the same time period in 2019.

The CMC’s partnership with Amazon launched on September 21, 2020. This program was initially approved as a two-month campaign targeting 7 million impressions at a total cost to CMC of \$35,000. Amazon was running a promotion for first-time advertisers in the fourth quarter of 2020 and we received an additional 4 million impressions (\$20,000 added value) at no cost to CMC. Due to the initial success of the program, the Domestic Marketing Subcommittee was notified of an opportunity to extend the promotion for two more months at an additional cost to CMC of \$20,000. The DMS recommended a continuation and the full Committee voted on November 11 to extend the program. More than 50 products from seven different handlers were featured on the US Cranberry landing page. In total, the 16-week campaign generated 14,122,031 impressions, totaled \$182,433.28 in sales (\$2.38 return on ad spend) and resulted in 27,814 units sold. The purchase rate was 0.12%, which is well above Amazon’s grocery industry benchmark of 0.021%. Additionally, 26.94% of the purchases were from new-to-brand shoppers who had not purchased these cranberry products in the previous year.

This spring and summer the CMC will be working toward executing the remainder of the 2020/2021 domestic marketing plan, which includes a renewed partnership with Produce for Kids (now branded Healthy Family Project), and attendance at two major conferences (SNA & FNCE). We will continue to research ways to support food pantries and increase the overall effectiveness of our social media outreach.



# CMC'S INTERNATIONAL EXPORTS GROW DESPITE 2020 GLOBAL PANDEMIC CHALLENGES

The worldwide impact of COVID-19 on the agriculture industry was enormous, affecting global supply chains, product innovation, foodservice operations, planting and harvesting conditions, and much more. Despite all of this, CMC is pleased to report that exports of U.S. cranberries grew by 24% from 2018/19 to 2019/20, totaling 3.06 million 100-lb. barrel equivalents. Exports to China grew by 133% and to India by 172%. Furthermore, China and India had the highest growth of new cranberry product launches since 2014, out of all top-15 export markets. It is clear that CMC and the industry's efforts to increase awareness and drive demand for U.S. cranberries has had a positive and stabilizing impact in these markets.

Major challenges and concerns remain in China, particularly with regards to uncertain U.S.-China trade relations, increased domestic cranberry production, and the continued effects of COVID-19. The tense U.S.-China political relations in particular made it difficult in 2020 to secure partnerships with major retail brands that were concerned about the perception of partnering with a U.S. branded food product.

Despite these undeniable challenges, CMC successfully pivoted its marketing strategy in the wake of COVID-19 to conduct a slate of successful retail promotions, digital marketing and social media campaigns. The partnerships CMC secured with retail brands like Bread Talk and Ori Tea led to an overall sales increase of 121%. Taking advantage of consumers being at home and on social media more than ever, CMC secured nearly 366 million digital and social media impressions and increased the number of followers on Weibo and WeChat by a combined 65%.

CMC's new in-country representative, SS Associates, was able to successfully adapt to the rapidly changing conditions brought on by COVID-19 in India. A switch from a print media campaign to e-commerce promotions with five major retailers led to an average reported sales increase of 64%, with the best performing retailer reporting a 248% sales increase. SS Associates also found success partnering with popular snack food manufacturer

CMC Five Year Export Data Overview							
	2015/16	2016/17	2017/18	2018/19	2019/20	% Change (Past Year)	% Change (5-year)
<b>Target Markets</b>							
<b>China</b>	<b>128,319</b>	<b>194,848</b>	<b>184,094</b>	<b>82,117</b>	<b>191,118</b>	<b>133%</b>	<b>49%</b>
<b>India</b>	<b>2,322</b>	<b>1,259</b>	<b>4,032</b>	<b>5,907</b>	<b>16,059</b>	<b>172%</b>	<b>592%</b>
<b>Top 20 Export Markets (Based on 2019/20)</b>							
<b>Pan Europe</b>	<b>1,009,212</b>	<b>947,869</b>	<b>1,147,292</b>	<b>884,660</b>	<b>1,106,259</b>	<b>25%</b>	<b>10%</b>
Germany	375,009	319,421	370,468	265,388	347,805	31%	-7%
Poland	116,073	129,326	158,806	99,253	154,667	56%	33%
France	147,754	182,995	242,724	163,925	140,135	-15%	-5%
Other Europe	363,782	316,128	375,294	356,094	463,652	30%	27%
<b>Canada</b>	<b>475,361</b>	<b>493,121</b>	<b>446,579</b>	<b>201,778</b>	<b>419,267</b>	<b>108%</b>	<b>-12%</b>
<b>UK</b>	<b>399,577</b>	<b>413,502</b>	<b>397,926</b>	<b>288,320</b>	<b>364,780</b>	<b>27%</b>	<b>-9%</b>
<b>Mexico</b>	<b>151,756</b>	<b>170,273</b>	<b>165,787</b>	<b>291,215</b>	<b>265,443</b>	<b>-9%</b>	<b>75%</b>
<b>Australia</b>	<b>113,841</b>	<b>109,872</b>	<b>100,091</b>	<b>105,681</b>	<b>120,663</b>	<b>14%</b>	<b>6%</b>
<b>Malaysia</b>	<b>4,033</b>	<b>3,191</b>	<b>6,208</b>	<b>52,095</b>	<b>62,013</b>	<b>19%</b>	<b>1438%</b>
<b>Taiwan</b>	<b>67,384</b>	<b>68,500</b>	<b>50,620</b>	<b>55,338</b>	<b>58,838</b>	<b>6%</b>	<b>-13%</b>
<b>Russia</b>	<b>21,288</b>	<b>19,446</b>	<b>65,159</b>	<b>41,827</b>	<b>56,002</b>	<b>34%</b>	<b>163%</b>
<b>Korea</b>	<b>58,473</b>	<b>77,126</b>	<b>53,289</b>	<b>74,043</b>	<b>54,351</b>	<b>-27%</b>	<b>-7%</b>
<b>Japan</b>	<b>25,799</b>	<b>31,881</b>	<b>38,891</b>	<b>26,523</b>	<b>47,338</b>	<b>78%</b>	<b>83%</b>
<b>Israel</b>	<b>62,337</b>	<b>60,335</b>	<b>15,708</b>	<b>66,371</b>	<b>43,703</b>	<b>-34%</b>	<b>-30%</b>
<b>Hong Kong</b>	<b>28,137</b>	<b>29,191</b>	<b>10,697</b>	<b>54,541</b>	<b>36,599</b>	<b>-33%</b>	<b>30%</b>
<b>Jamaica</b>	<b>8,304</b>	<b>8,316</b>	<b>10,529</b>	<b>13,758</b>	<b>32,270</b>	<b>135%</b>	<b>289%</b>
<b>New Zealand</b>	<b>23,798</b>	<b>19,819</b>	<b>19,748</b>	<b>26,754</b>	<b>29,111</b>	<b>9%</b>	<b>22%</b>
<b>Puerto Rico</b>	<b>33,901</b>	<b>32,629</b>	<b>29,596</b>	<b>24,035</b>	<b>28,847</b>	<b>20%</b>	<b>-15%</b>
<b>Turkey</b>	<b>7,056</b>	<b>13,001</b>	<b>29,376</b>	<b>12,536</b>	<b>18,136</b>	<b>45%</b>	<b>157%</b>
<b>Colombia</b>	<b>5,256</b>	<b>4,872</b>	<b>9,020</b>	<b>18,518</b>	<b>15,355</b>	<b>-17%</b>	<b>192%</b>
<b>South Africa</b>	<b>8,301</b>	<b>14,003</b>	<b>16,720</b>	<b>12,895</b>	<b>11,384</b>	<b>-12%</b>	<b>37%</b>
<b>Singapore</b>	<b>6,779</b>	<b>5,984</b>	<b>6,000</b>	<b>6,405</b>	<b>9,232</b>	<b>44%</b>	<b>36%</b>
<b>UAE</b>	<b>1,807</b>	<b>6,511</b>	<b>14,284</b>	<b>17,162</b>	<b>8,746</b>	<b>-49%</b>	<b>384%</b>
<b>All Remaining Countries</b>	<b>272,103</b>	<b>339,926</b>	<b>400,086</b>	<b>199,420</b>	<b>273,888</b>	<b>37%</b>	<b>1%</b>
<b>Grand Total</b>	<b>2,777,908</b>	<b>2,869,369</b>	<b>3,033,607</b>	<b>2,473,875</b>	<b>3,062,225</b>	<b>24%</b>	<b>10%</b>

Haldiram's, developing nine cranberry sweetmeats and selling more than 1,500 kg of U.S. cranberries.

Health benefits messaging has been a focus of the international marketing program for several years. However, 2020 saw a notable shift in consumer interest in health due in large part to COVID-19, as seen in the latest research from our Nielsen consumer surveys. For example, in China, 47% of consumers want to follow a diet that reduces the risk of lifestyle diseases and are more willing to invest in health products and health supplements that boost immune systems. And in India, 69% of consumers indicated that they eat cranberries specifically because of their health benefits. This is perfect timing as CMC plans to continue heavily promoting the results from the *H. pylori* clinical study. This includes partnering with prominent health-focused key opinion leaders, doctors, nutritionists, and health associations, and

securing advertisements in major consumer magazines, newspapers, and television shows. The results have already been noteworthy particularly in India, with more than 155 million impressions generated for the *H. pylori* press release and Dr. Amy Howell being featured in a 22-minute program on New Delhi Television Limited (NDTV). The future is bright for capitalizing on the cranberry health halo in CMC's target markets.

Download the full winter meeting  
International Marketing reports at  
[uscranberries.com](http://uscranberries.com) > Web Resources >  
Annual Meeting Materials

View the 2021 International Activity  
Calendar at [uscranberries.com](http://uscranberries.com) > Industry >  
Global Marketing

## FIVE-YEAR COMPARISON REPORT: FIRST QUARTER NUMBERS INCLUDING CY2020

CY2020 first quarter summary reports, as well as several comparison reports, can be found by clicking “Data and Reports” under the “Industry” menu on [www.uscranberries.com](http://www.uscranberries.com). The chart below represents data from September 1 to December 31 of each year. A few general observations comparing the 2019 vs. 2020 Crop Years are as follows:

- Domestic production increased by 1.6%.
- Foreign acquisitions increased by 30.4%.
- Domestic sales decreased by 4.8%.
- Export sales decreased by 27.6%.
- Total ending inventory decreased by 1.8%.

	2016	2017	2018	2019	2020
<b>Beginning Inventory</b>					
Barrels Unfrozen:	0	0	0	0	0
Barrels in Freezers:	2,773,027	4,175,273	2,281,453	2,484,365	1,726,311
Barrels in Process Form:	2,024,414	1,842,736	2,016,816	1,671,832	1,020,448
Barrels in Concentrate Form:	3,508,002	3,727,372	2,586,624	1,780,092	2,017,370
Inventory Before Adjustments:	8,305,443	9,745,381	6,884,893	5,936,289	4,764,129
Adjustments:	-2,664	-5,070	31	1,018	0
<b>Adjusted Beginning Inventory:</b>	<b>8,302,779</b>	<b>9,740,311</b>	<b>6,884,924</b>	<b>5,937,307</b>	<b>4,764,129</b>
<b>Sources</b>					
Massachusetts, Rhode Island, Connecticut:	2,102,566	1,758,592	2,237,243	2,015,713	1,865,118
New Jersey:	575,192	422,830	447,592	447,723	513,796
Oregon:	379,458	474,359	544,464	515,038	560,002
Washington:	159,475	130,684	180,778	141,863	179,296
Wisconsin, Michigan, Minnesota:	6,040,837	5,335,325	5,271,545	4,485,133	4,608,826
Other states:	217	196	0	0	0
Total Domestic Acquired:	9,257,745	8,121,986	8,681,622	7,605,470	7,727,038
Foreign Acquired - Fresh:	75,624	86,617	76,013	75,156	41,704
Foreign Acquired - Processed:	1,909,554	1,146,160	1,639,325	1,026,431	1,422,735
Foreign Acquired - Concentrate:	7,526	44,017	2,403	23,749	2,827
<b>Total Barrels Acquired:</b>	<b>11,250,449</b>	<b>9,398,780</b>	<b>10,399,363</b>	<b>8,730,806</b>	<b>9,194,304</b>
Barrels in Transit:	-49,800	69,478	34,121	-1,623	-7,442
<b>Sales</b>					
Domestic Sales - Fresh:	288,629	284,632	281,559	282,003	282,459
Domestic Sales - Processed:	2,294,097	2,514,292	2,113,965	2,275,634	2,213,135
Domestic Sales - Concentrate:	0	0	357,071	364,215	304,835
Sold to Government:	139,874	54,903	14,552	30,798	11,974
Total Domestic Sales:	2,722,600	2,853,827	2,767,147	2,952,650	2,812,403
Foreign Sales Fresh:	43,821	45,269	46,461	50,134	42,788
Foreign Sales Processed:	952,697	996,609	1,296,038	961,414	600,126
Foreign Sales Concentrate:	175,022	136,386	118,344	225,264	252,474
Total Sales:	3,894,140	4,032,091	4,227,990	4,189,462	3,707,791
Shrinkage:	18,862	205,473	428,769	40,421	-7,354
<b>Total Sales &amp; Shrinkage:</b>	<b>3,913,002</b>	<b>4,237,564</b>	<b>4,656,759</b>	<b>4,229,883</b>	<b>3,700,437</b>
<b>Ending Inventory</b>					
Barrels Unfrozen:	195	0	0	0	0
Barrels in Freezers:	9,669,940	8,711,001	8,318,590	7,009,987	7,346,351
Barrels in Process Form:	2,218,808	2,336,321	1,622,852	858,545	775,374
Barrels in Concentrate Form:	3,701,482	3,923,683	2,720,207	2,568,075	2,128,829
<b>Total Barrels in Inventory:</b>	<b>15,590,425</b>	<b>14,971,005</b>	<b>12,661,649</b>	<b>10,436,607</b>	<b>10,250,554</b>

# COMMITTEE TO BEGIN 5-YEAR STRATEGIC PLANNING PROCESS WITH VOLITION PARTNERS

continued from page 1

## **Phase 2: Strategic Plan Development**

*Timing: April-June*

Following the assessment phase, Volition will begin development of the long-range strategic plan. Working closely with CMC leadership, the planning process will include the following activities:

- A general brainstorming and discussion meeting (half day or series of shorter meetings) to craft the outline of the plan and define its final scope and contents.
- A 2-hour mission and purpose ideation session with CMC leadership and key stakeholders to draft unifying mission and purpose statements that will provide a “north star” for the organization going forward.
- Coordination and facilitation of 6-7 break-out meetings on specific industry topics that need to be

addressed in detail as part of the strategic plan. Each breakout will include approximately 4-6 attendees (via video-conference). The final list of topics will be based on findings from discovery phase.

- During phase 2, we will also begin to explore ideas for a supplemental effort to create a potential 10- to 15-year industry vision.

Phase 2 key deliverables:

- Summary findings and analysis from breakout sessions.
- Draft long-range strategic plan delivered to CMC leadership.

## **Phase 3: Strategic Plan socialization and delivery**

*Timing: July-August*

Once the draft strategic plan has been green lighted (with reasonable changes as

requested), Volition will begin the process of socialization with board members. The plan (or at minimum an executive summary) will be circulated in advance of the August 2021 board meeting, possibly with a short survey to obtain clear and consistent feedback. Any additional input or change requests from board members will be incorporated into the final plan to be delivered in person by Volition Partners at the August 2021 CMC board meeting.

Volition Partners will then work with CMC to plan and facilitate the August board meeting, including in-person attendance to deliver the plan and facilitate any related planning sessions as mutually agreed.

Phase 3 key deliverables

- Final strategic plan document(s).
- August board meeting agenda and facilitation guide.



At its annual winter meeting, the Committee received updates from several industry groups representing different growing regions around the country.

### **CI**

The Cranberry Institute & CMC chairs and executive directors have been connecting on monthly calls. The CI is in the process of implementing its new strategic plan, spending time on the water model and its impact on IR-4, working closely with government affairs, and working on tariffs and MRL issues.

CI's executive director, Bill Frantz, noted how remarkably accessible and easy it was to work with

Volition Partners during the CI's strategic planning process. He stressed how collaborative the effort was, and the CI's chair, Andy Reitz, added Volition's approach and curiosity about the cranberry industry was helpful in the planning process.

### **WSCGA**

The Wisconsin State Cranberry Growers Association has been coordinating its strategic plan implementation amongst Wisconsin cranberry organizations. Most meetings have been virtual, but they are planning on an in-person summer meeting. Most of the work the WSCGA has been doing lately is on research, including renovation and

construction at the research station, which will open June 1, 2021.

### **CCCCGA**

The Cape Cod Cranberry Growers Association has also been working on a strategic plan, as well as preparing for its virtual winter meeting. CCCGA received a NRCS conservation innovation grant and is looking at micro-climate data to help drive management decisions for food quality. Other recent accomplishments include: \$500,000 from USDA ARS (a joint industry effort with WSCGA & ACGA), funding for bog renovations throughout the state, capital improvement grant program for growers looking to do

capital improvement projects.

### **ACGA**

2020 was a relatively quiet year for the American Cranberry Growers Association due to the challenges of the pandemic. Most events and meetings were either canceled or moved online, including both the Summer Field Day and the Winter Annual Meeting. The most significant development was the recent hiring of a research geneticist and a bioinformaticist by the USDA/ARS. Both will be joining the team of researchers at the Rutgers Marucci Center in Chatsworth, NJ and will be partnering with the existing cranberry breeding program.





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- 2 CROP YEAR 2021 ESTIMATE**
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# March 2021 Cranberry News

## COMMITTEE SUPPORTS DOMESTIC CLINICAL STUDY PROMOTION

At its annual winter meeting, the Committee voted to move forward with a proposal for amplification of the *H. pylori* clinical study, targeting consumer health, nutrition, food, science and trade media in the United States.

Pollock Communications will be enlisted to generate media coverage of the study results highlighting the benefits of cranberry PACs.

The promotion will create additional awareness of the study results and positive cranberry health benefits among consumers by leveraging the support of influential registered dietitian spokespersons and a nutritional biochemist, such as Dr. Jed Fahey, the director of the Cullman Chemoprotection Center at Johns Hopkins Medical School.

In addition to consumer media outreach, Pollock will conduct targeted outreach to industry publications that reach growers and retailers to create even more awareness of the latest cranberry research.



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