



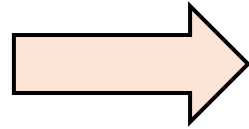
# California Crop Update

TomatoNews Conference

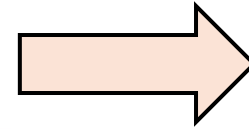
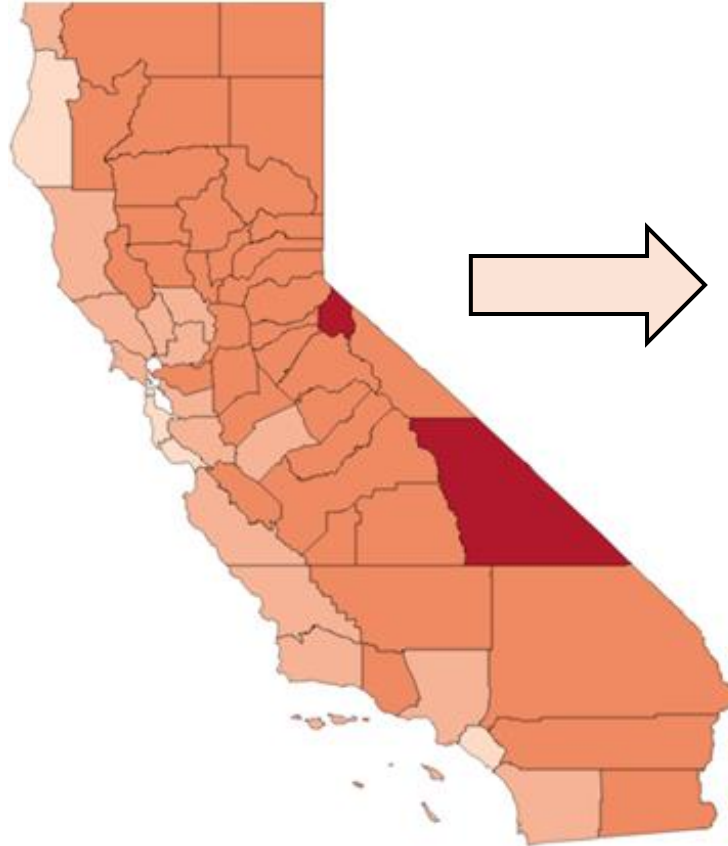
December 2024

# California Heat Impacts Production

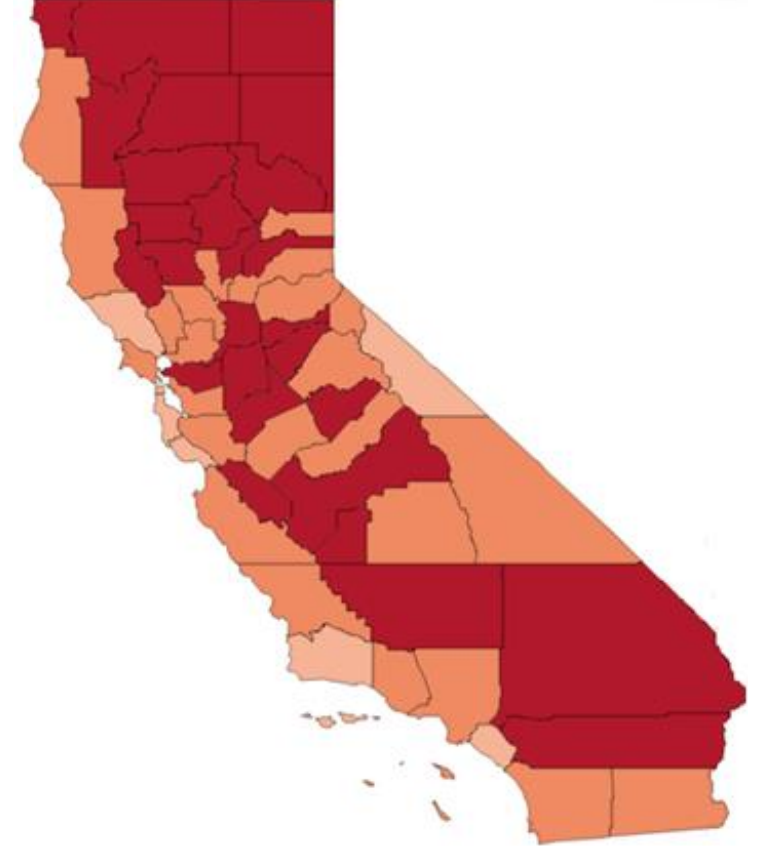
May (State 2.4°F / 1.3 °C)



June (State 5.8°F / 3.2 °C)



July (State 6.8°F / 3.8 °C)

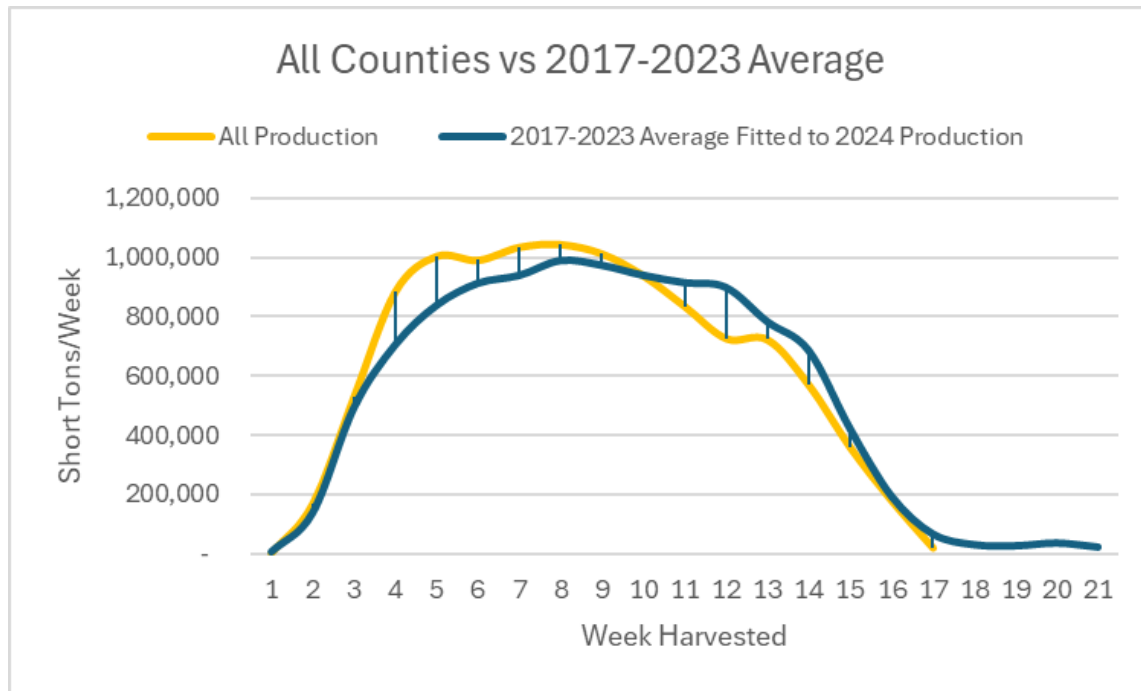


Source: National Oceanic and Atmospheric Administration (NOAA)

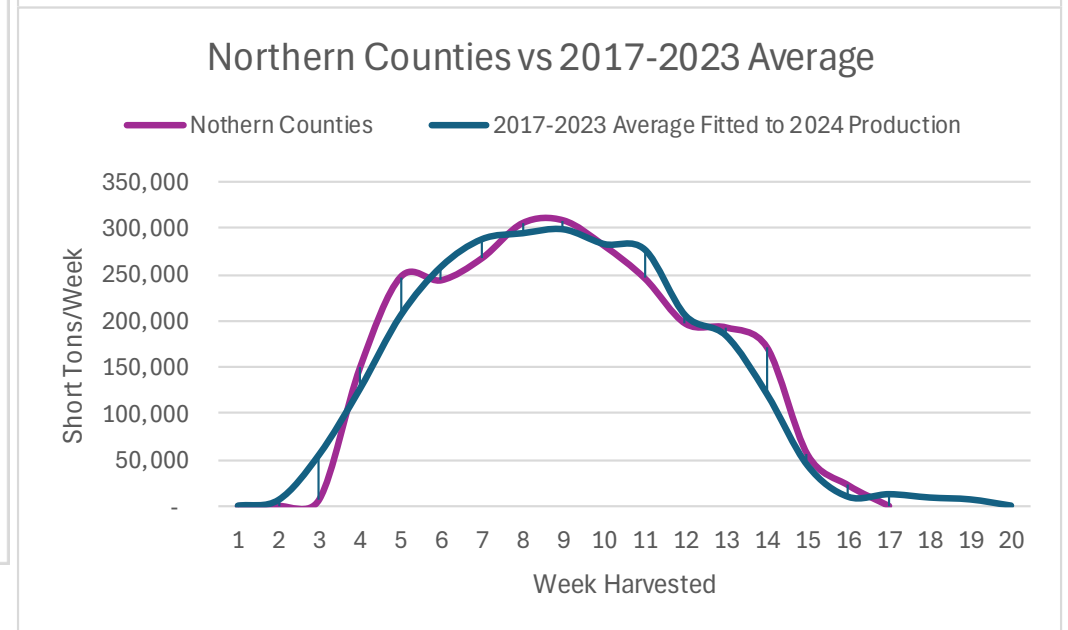
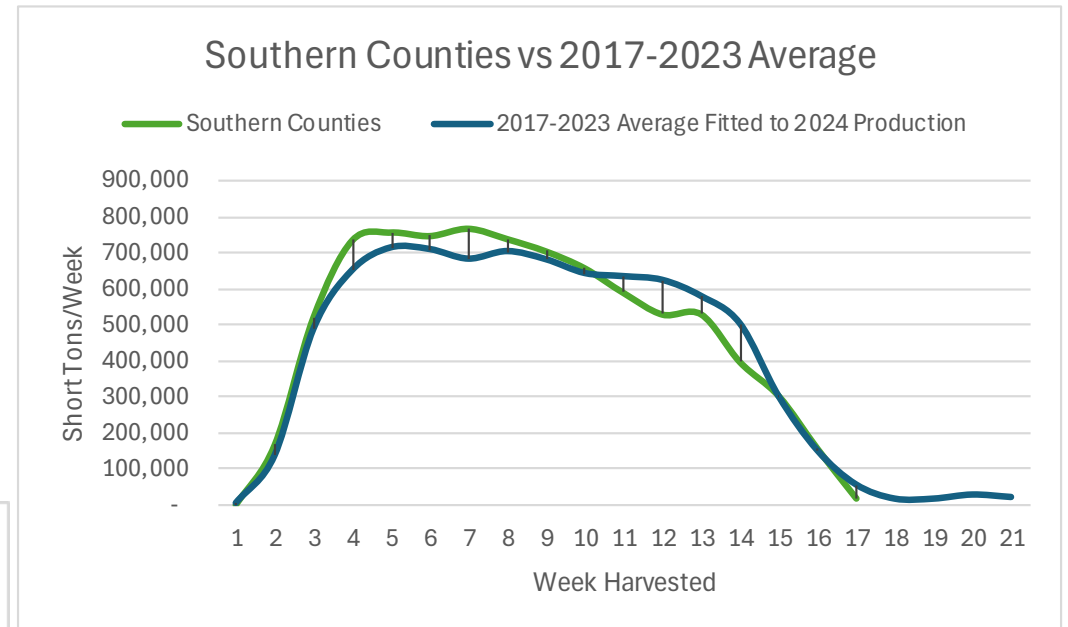


# Harvest Result

*The Effect of the Heat Wave on Harvest Progression using Actual Short Tons harvested by week compared with the 2017-2023 average output by week fitted to actual 2024 production. Accelerated maturity followed by periods of low yields due to heat impact and maturation timeline.*



Source: PTAB



Jul-24 to Jun-25  
2024 ESTIMATES

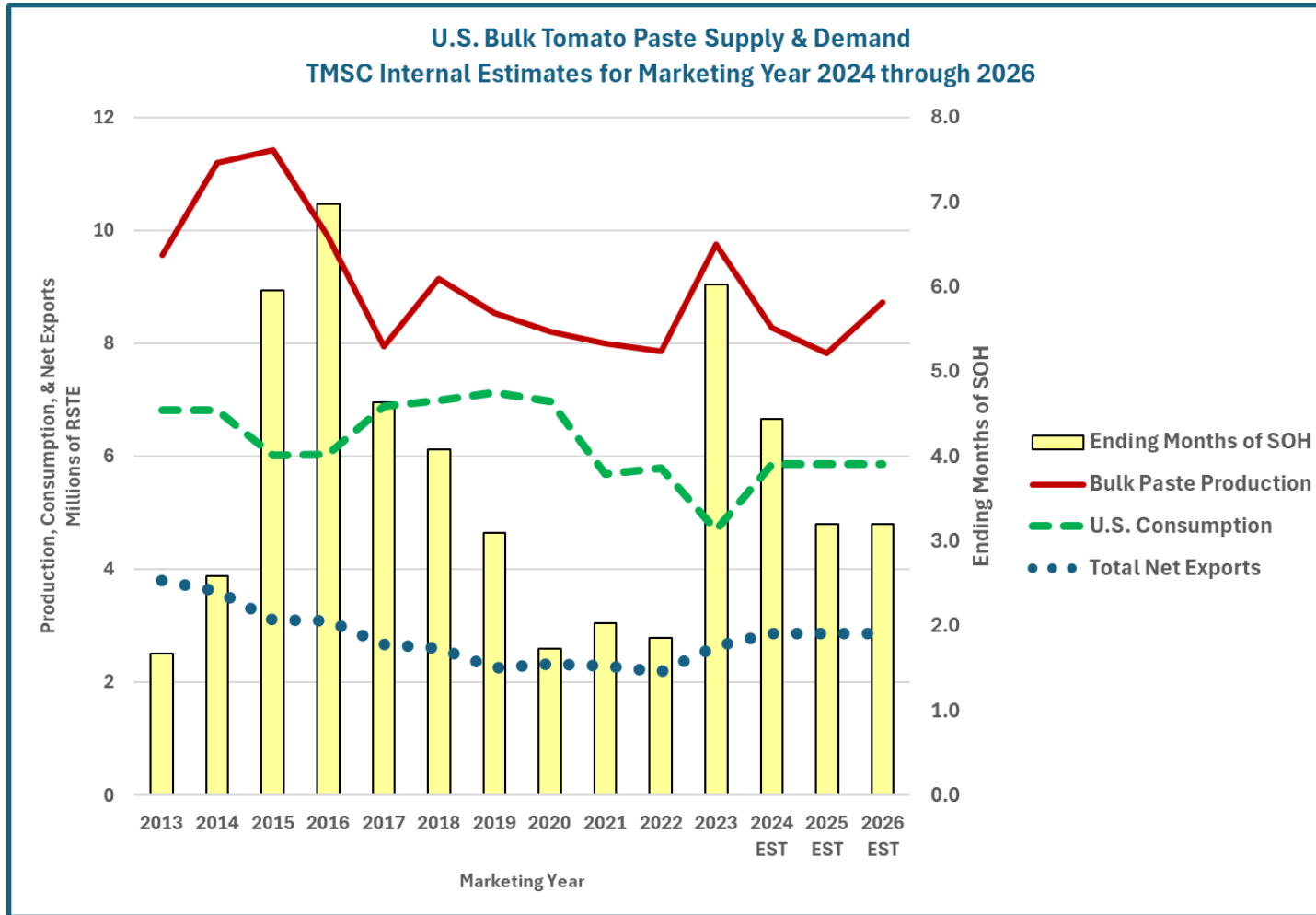
Month of Stock:  
~1.6 Months ↓

Production as Ratio  
of Movement:  
95%

Net Exports:  
10% ↑

US Consumption:  
25% ↑

# Inventory & Production



Source: Morning Star, GATS, CLFP

Jul-25 to Jun-26  
2025 ESTIMATES

Month of Stock:  
~1.2 Months ↓

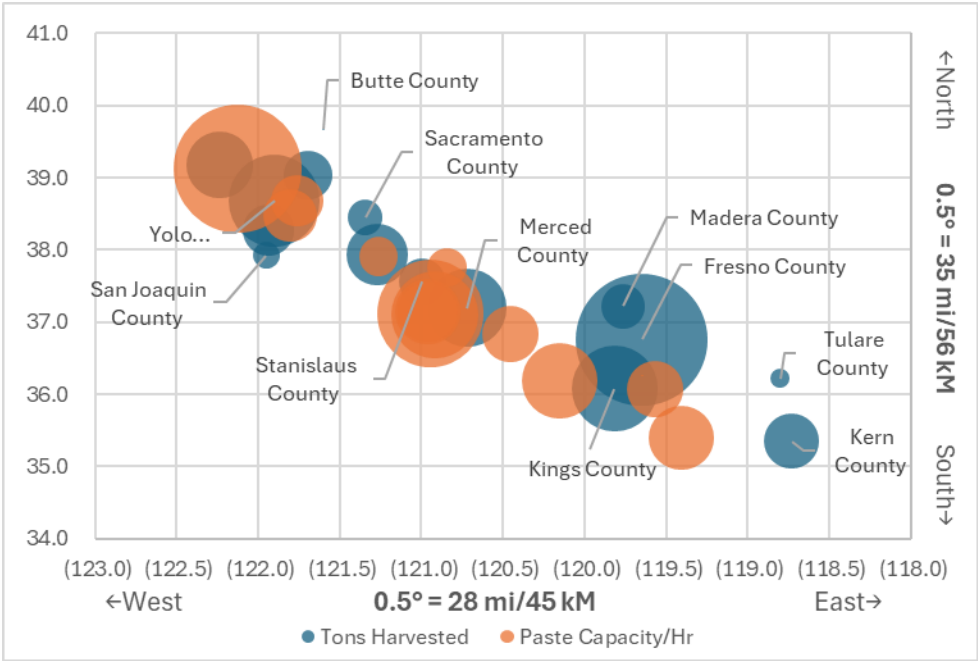
Production as Ratio  
of Movement:  
90%

Priority:  
Short Season

Priority:  
Proximity to Factory

# Strategic Sourcing

**Tonnage by County and Geo Location of Paste Capacity/Hr**  
**Blue = Tons Harvested 2024; Orange=Factory Paste Output/Hr**



Source: PTAB & Morning Star

**116.4%**  
 All Reservoirs  
 % of Historical Avg

**62.5%**  
 All Reservoirs  
 % of Capacity

Source:  
 EngagingData.com

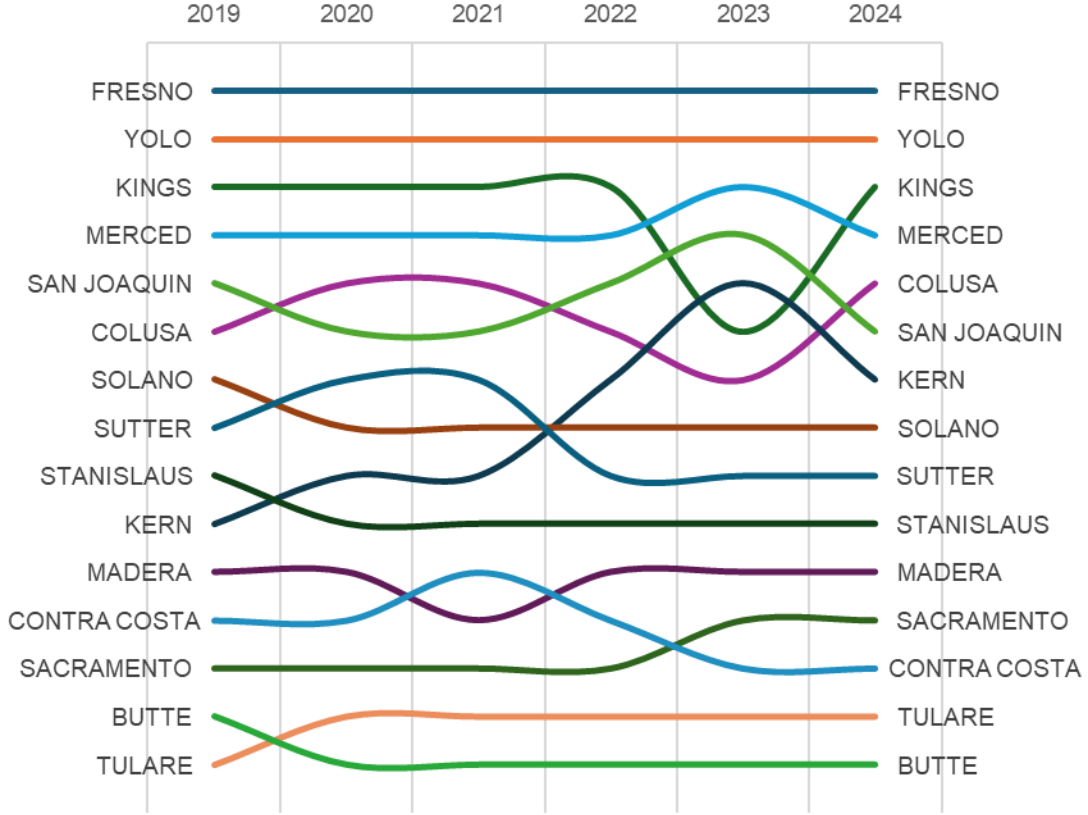
**5%**  
 Dec 2024  
 State Allocation

**10% → 40%**  
 Dec 2023-Final 2024  
 State Water Allocation

**5% → 100%**  
 Dec 2022-Final 2023  
 State Water Allocation

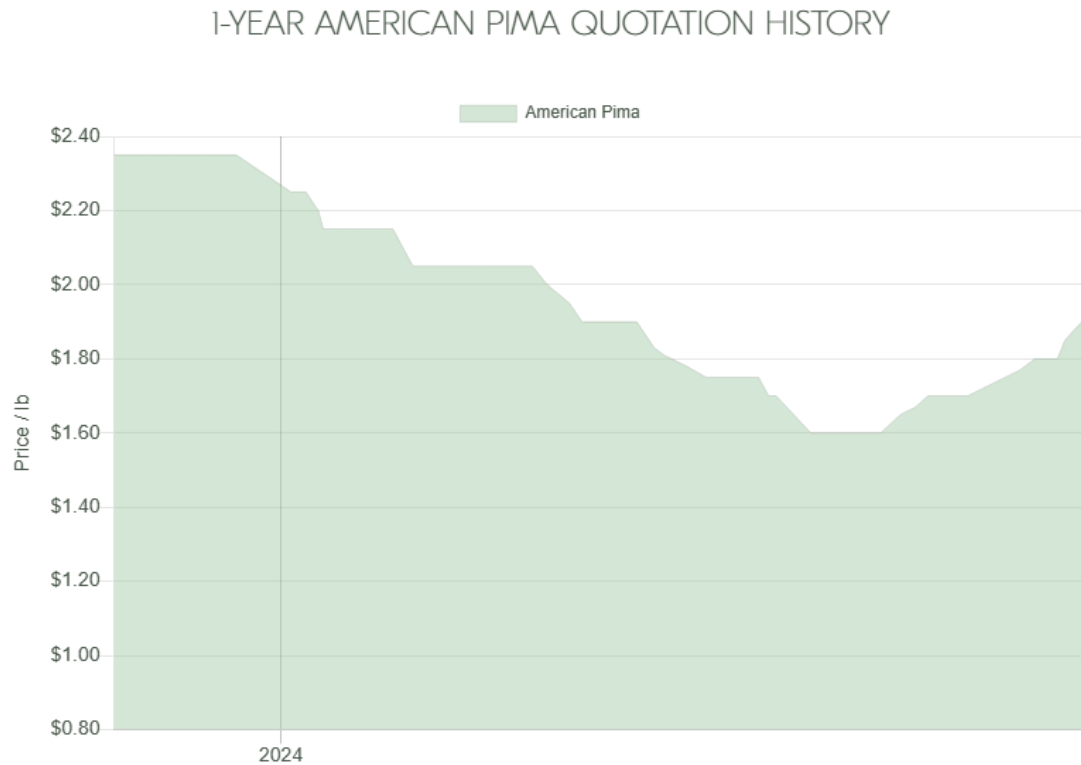
Source: California DWR

**County Rank of Total Tons Harvested (Top=1, Bottom=15)**



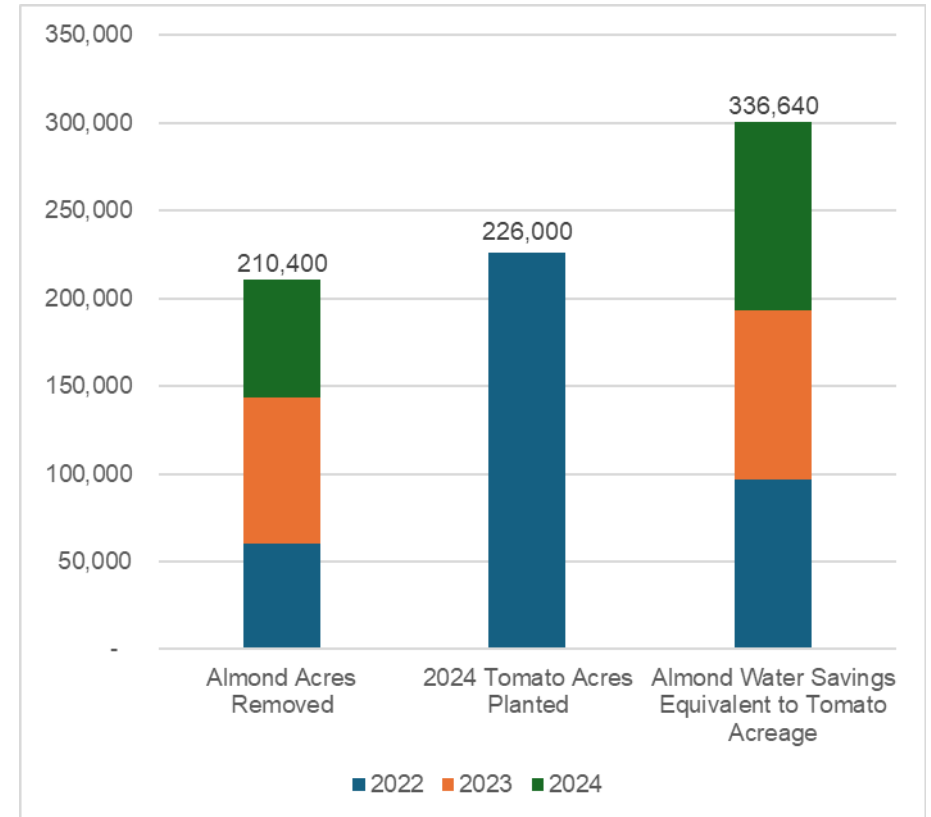
# Competition: Production & Trade Impacts

Pima Cotton: 182,000 acres (73,653 ha)



Source: Supima.com

Almonds: 1,525,000 acres (617,147 ha)



Source: Almond Board of California