

Student Research

Case Studies in Agribusiness

California Polytechnic State University San Luis Obispo Year 2017

Bonipak Produce Inc.

Steven Partie* Grant Copeland†
David Minney‡

*Agribusiness, Cal Poly, San Luis Obispo

†Agribusiness, Cal Poly, San Luis Obispo

‡Agribusiness, Cal Poly, San Luis Obispo

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Bonipak Produce Inc.

Don Klusendorf walked to the front of the room filled with Cal Poly students. He raised his hand and asked, “Who here had heard of Bonipak Produce before coming here today.” The room was silent and a slight chuckle was heard when no one raised their hand. Knowing exactly the outcome of this question, Don, the Vice President of Sales and Marketing, explained the reasoning behind this, “When you go to Whole Foods and purchase a head of lettuce, do you come back to buy that specific head of lettuce again? No, you come back to Whole Foods because you know you can trust their quality. Bonipak is not a household name because our customers, Safeway/Albertsons, Costco, Walmart, Kroger, Whole Foods are. We are a high quality and great customer service vegetable producer our customers (the retailers) trust and that is our market.” Don went on to explain how this attention to quality and customer service allowed for a beet farm from 1932 to become the fifth largest agriculture producer for fresh vegetables in the nation.

History of Bonipak:

Bonipak was created in 1932 when Milo Ferini and Dominick Ardantz, two sugar beet farmers, formed a partnership in Guadalupe, California that dedicated itself to product quality and customer service. In 1936, the partnership acquired Bonita Vegetable Co., which later became known as Bonita Packing Company and further shortened to Bonipak. Shortly after the acquisition of Bonita Vegetable Company, sugar beets got replaced with products such as celery, lettuce, and other vegetables. Ferini and Ardantz both agreed that Guadalupe limited the growth of their company, so in 1950 they decided to move to Santa Maria, California. The Santa Maria Valley offered fertile soil and temperate growing conditions, providing year-round production of many of their products. By the 1960’s, the second generation, which included Patrick Ferini, Henri Ardantz, and Milo Ferini Jr., entered the family business. In 1962, the second generation

saw growth in acquiring one of their Santa Maria competitors Betteravia Farms. Betteravia Farms became a part of Bonipak in 1972 and by 1977 took control of Bonipak's interest to change from a co-op to a corporation. By 1977, Bonipak ownership consisted of Betteravia Farms, F and A, and Adams. By 1988, Betteravia Farms purchased Adams' share of Bonipak, and in 1997 bought out F and A's remaining shares allowing them to take complete control over Bonipak. Now with full control of the company, the third generation, Alain Pincot, Craig Reade, Mitch Ardantz, Rob Ferini and Tom Minetti, entered the family business. The new wave of owners also brought new ideas in the 1990's, Bonipak first started producing organic products and experimented with value-added products. Bonipak increased their growing capacities and strengthened their position in the marketplace throughout the 2000's. They also became one of the first vegetable producers to open an in-house lab to assist in good agricultural practices. By 2010, what started as a small beet farm became one of the fifth largest agricultural producers of fresh vegetables in the United States.

Produce Industry

Overview

Fresh produce is becoming one of the largest industries to date, reaching seven billion dollars in total profit by the end of 2018 (Bizzozero). According to the USDA ERS in Figure 1, fresh produce sales was valued at eight billion dollars in 2012. There are several factors that drive the fresh produce industry. According to Figure 3, convenience, quality, health and versatility are how products are meeting key customer needs. U.S. producers meeting these expectations has led to sales of over 63 billion dollars (PMA). However, according to the Produce Marketing Association Report in Figure 4, "it is not only what people buy, but where they buy the produce." For example, Trader Joe's and Whole Foods provide premium produce; while Aldi and Food 4 Less are providing customers with lower cost options. The quality and value of produce that these stores offer has inspired the natural foods movement.

The natural foods movement for desirable products that are non-gmo, all-natural, or organic has allowed for more companies to seize the opportunity of creating their own unique niche in the market. More competition is arising from different industry giants focusing on fresh

produce. For example, Dole, Del Monte and Chiquita have recently entered the fresh produce industry. Dole is the biggest of the players with operations in more than 90 countries (Hoovers). With the growth of the fresh produce worldwide, larger growers have begun to dominate the export and global market while the smaller growers have learned to work the domestic market (Alvarez et. al). With no real differentiation between the actual products, quality assurance is vital. However, physical injury caused by disease, seasonality, and temperature are factors that affect the quality and food safety of the fresh produce.

Contributors to Produce Loss

Physical injury can be easily caused by mishandling the delicate produce. This occurs on all levels of the supply chain. For example, shipments sent overseas often struggle with splintered boxes or crates. Domestically, over packing, dropping, walking, or throwing containers lead to the most produce loss. Physical injury to produce opens the door to disease caused by bacteria, leading to major food safety problems. For example, food safety has plagued the industry from its early existence. Contamination from animal byproducts and water borne microbes have lead to sufficient restrictions to be placed on fresh produce. As a result, smaller farms are unable to keep up with the costs of meeting the new food safety standards (Bell et. al).

Bacteria can also be formed from temperature fluctuations. Each type of vegetable or fruit demands a certain temperature in order to maintain optimal freshness. Produce loss can easily be caused by a break in the cold chain, which allows bacteria like E. Coli and Salmonella to form. If spread, these bacterias can destroy much of the current market for that product.

Seasonality is another large issue facing the produce industry. Although produce can be grown in every state, the length of the growing season, variability of weather, availability of labor and land costs affect the viability of production (Bell et. al). All of these conditions affect the way farmers are able to make decisions on how much to produce, when it will be ready to harvest, and the quality of their product.

New Developing Trends

Vegetables have been able to remain an important dietary item throughout the years because it meets basic nutritional needs and prevents disease (Seminis). In the last decade, the produce industry has seen an increase in demand from the growing number of people trying to include healthier foods in their diet. A report conducted by the Nielsen Global Health and Wellness Survey showed that around 41% of Generation Z said they would be willing to pay more for healthier products (Watson). Another study conducted by PwC also showed, “Over the past year, nearly half (47%) of the 18-34 age group surveyed had changed their eating habits towards a healthier diet, as compared to just 23% of those aged over 55” (PricewaterhouseCooper). Younger generations, such as millennials, starting to shop for themselves has caused an increase in demand for healthier foods, such as fresh fruits and vegetables. Another factor that has contributed to this growing demand has been the rise in organic products. Sales for organic products have grown by 20% annually. The sudden increase in demand for organic foods has even outnumbered some organic suppliers. The U.S. market for imported organic food has rose to \$1 billion per year (Faber). This statistic raises a question if the U.S. is going to see more organic specialty farms forming in the future? Current trends suggest that consumer preference is going to keep the produce industry as a major player in food retail for years to come.

Another significant trend has been the growth in demand for value-added products such as pre-washed and cut vegetables. Out of the five fresh produce categories, value-added vegetables saw the biggest growth 7.5% of total volume in 2011. Value-added fruit was second with a 4.6% increase. Steve Lutz, the Executive Vice President of the Nielsen Perishables Group from 2000 to 2013, stated that “Quality, selection and better targeting with better packaging are all fueling growth” in regards to value added products like pre-cut vegetables. Another factor that has contributed to this trend is consumers desire for convenience and demand for a wide variety of options. The importance of customer convenience has encouraged the growth of bagged salads and pre-cut vegetables. Experts have predicted that the ready-to-eat vegetable and fruits sector will increase from \$5.5 billion in 2013 to \$7 billion by 2018 (Bizzozero).

The globalization of supply is also a major trend in the produce industry. Peter Menzel, an American freelance photojournalist best known for his coverage of scientific and

technological subjects, conducted a study on what the world eats. After traveling around the world for multiple years, he noted that most grocery stores are now carrying the same items, the only difference is the people who are in them (Menzel). The significance of this study shows that as the world is becoming more globalized, more producers are exporting to other regions. Therefore, more products are becoming available to a wider variety of people increasing demand for fresh produce.

Lastly, the final trend is the growing importance of large retailers due to the growing consolidation (Seminis). The rise of supercenters, such as Wal-Mart, allows control of market share for multiple industries, fresh produce included, while keeping prices low. This has caused a decrease in people shopping at supermarkets (Volpe). This growing trend has led to the “one stop shop customers”, who choose retailers like Wal-Mart because the accessibility of multiple items at one place. This caused retailers to encourage their producers to have a diverse portfolio of products.

Company Overview:

As of 2014, Bonipak/Betteravia was ranked 10th largest (in acreage) agriculture firm in the west. With over 20,000 plantable acres, Bonipak has been able to diversify their production of fresh vegetables. Currently, Bonipak offers 18 conventional, five organic and three processed/value-added products. Having one of the widest ranges of products has allowed Bonipak to secure customers like Costco, Safeway-Albertsons, Kroger and Loblaw. The cooler in Santa Maria receives and ships over 100,000 cartons of fresh vegetables everyday. How is it that a company starting as a beet farm in 1932 is able to be one of the top five fresh vegetable producers in the nation?... it all starts with Bonipak’s signature Seed to Sale approach.

Seed to Sale:

Bonipak uses a unique Seed to Sale approach that allows for complete control of their products and maximum customer satisfaction. By vertically integrating, Bonipak is able to project volume needs and be a leader in sustainable growing. There is no established timeline to

the Seed to Sale approach because Bonipak is dedicated to the highest quality products and, therefore, will only plant and harvest when it is the ideal time to do so.

Plan

The first step of the Seed to Sale approach is establishing a plan. Bonipak's sales team works with both the customer and the field teams to ensure volumes and product specifications are met. This allows all Bonipak teams to forecast supply and demand months in advance. Furthermore, Bonipak is able to order specific packaging for the products, such as private labels.

Seed

Bonipak has established relationships with the highest quality seed producers. By working closely with these producers, Bonipak can plan for the best varieties for certain soil conditions, climates and seasons. Often times Bonipak utilizes transplants, which are grown in a nearby facility then planted once two to three inches high. This allows for an increase in crop uniformity, and a decrease in pesticide and labor use.

Plant

Being established in Santa Maria since 1950 allows for unique insights about Bonipak's land. The first and second generations owners are able to blend both science and personal knowledge about Santa Maria to maximize quality and yields. Bonipak has a state of the art laboratory for testing nutrient and pH levels of their fields to allow for minimal input of fertilizers. Minimal tillage and crop rotations are two ways Bonipak keeps the biological nature of the land in balance, while also keeping true to their sustainability practices. With such a wide selection of crops and personal knowledge of growing seasons and conditions, Bonipak is able to optimize yields by planting the perfect crops in the best field at the ideal time. With over 20,000 farmable acres located in Santa Maria, Bonipak utilizes high tech transplant planting machinery, which allows for hours of work to be cut down to minutes. The use of recyclable drip-tape watering systems allows for sustainable growing because it reduces water usage by 50% and eliminates water run off. Once planted, internal PCA testing facilities and third party spraying

companies control pesticide usage. Don stated, “We control levels of pesticide usage to the absolute lowest essential applications on conventional products.”

Harvest

Bonipak’s harvest and sales teams work together to ensure the freshest products are ready to ship when needed. Constant communication between product and harvest managers enables a quick cut to cool time. Harvest teams know that for every hour a freshly cut product is not cooled, results a one day loss in shelf life. Using multiple trucks which carry smaller loads is one way to help with this. By filling up multiple small trucks during harvesting, Bonipak is able to get the products to the the different cooling devices much quicker.

Cooling

Bonipak has positioned their cooler to be no more than 19 miles away from any of their fields (Figure 5). This dramatically reduces uncooled time compared to their competitors in Salinas who’s coolers can be as far as 75 miles away. A recent expansion to the cooler added an extra 40,000 square feet to the existing 60,000 square foot facility (Figure 6). This expansion also included an addition of a variety of different cooling machines that utilize vacuum cooling technologies. Cauliflower is the hardest to cool, taking up to three hours, while lettuce can be cooled in less than 45 minutes. Working with such a large cooler and having to chill over 22,000,000 cartons a year requires a large demand for energy. Bonipak’s dedication to sustainable farming allowed an investment for a four and a half acre solar field, which covers over 33% of energy used by Bonipak.

Processing

Bonipak constantly searches for ways to diversify their products. One form of diversification is BoniFresh. Located just minutes away from the fields, BoniFresh offers broccoli and cauliflower florets, as well as cauliflower rice. At the early stages of Bonipak’s value-added products, they have seen smaller profit margins compared to their conventional products. However, Don sees the benefits outweighing the smaller margins. This diversification

has allowed Bonipak to enhance their product line, which has attracted customers, like Costco, to start carrying Bonipak products. This large accomplishment encourages Bonipak to create new value-added products, such as their new cauliflower rice, which Bonipak sees as the next hot item. As Bonipak continues to streamline their value added production, more products and higher margins are predicted.

Shipping

Bonipak focuses their sales in North America, utilizing trucking as the main form of transportation. What sets Bonipak apart from their competitors is the logistic efficiency of their docks. With anywhere from 100 to 250 trucks coming daily, Monday through Saturday, extensive planning is needed to ensure that Bonipak's produce does not break the cold chain. Each truck has an appointment time that is set up days in advance. This allows the harvesters to plan accordingly, allowing the freshest products to be shipped. Don had pushed Bonipak to create a appointment system to maximize Bonipak's efficiency. This was first looked at as pointless by their customers, truckers and competition, however, the system has since proved its effectiveness and has been adopted by the people who were originally against it.

Sales

As with any successful company, the ability to sell a high volume of product is essential. Bonipak is no exception. Don Klusendorf is the Vice President of Sales and Marketing and his staff is about 20 employees. Bonipak is able to keep their sales department employees low because of their customer relations. The utilization of private labels has helped create loyal customers who trust Bonipak for their personal labels. Furthermore, Bonipak does 88.5% of all sales with the top ten retailers; including Costco, Walmart, Safeway/Albertsons, Kroger, Loblaws, and Vons.

The main produce sold is broccoli, cauliflower, celery, lettuce and romaine. These items also come as organic, which is supported by the domestic health trends. Bonipak also believes speed is essential. Only 32% of orders are shipped as partial, allowing trucks to arrive at their destinations quicker. This is a crucial management tactic that provides the freshest produce and

ultimately unfailing customer satisfaction. Due to the effectiveness of the sales team, the top ten retailers are willing to pay the highest price for Bonipak products. Bonipak also has multiple commitments from customers. Consistent customers who order the same quantity of a product every week is able to purchase at a lower price when a product skyrockets in price. However, both Bonipak and that customer understand that when a price plummets, that customer will pay more.

Bonipak's sales team also actively avoids risk. They will only allow their products to make up 25 to 35% of the total product volume purchased by a customer. This allows them to avoid not being able to fulfill orders and lose vital partnerships. Bonipak's art of the selling has resulted in continued growth and success in the sales department.

Sustainability

Bonipak's mission statement for Sustainability is, "Farming with the future in mind." When you take from the land you must be willing to give back at the same time. Bonipak believes, "it's responsible growing practices and environmental commitment" are "what will leave the land more bountiful than it is today." This is done through five significant practices. The first is a drip tape watering system which uses 50% less water, has zero runoff and can be reused for many years. The second avenue is minimum tillage which not only prevents land erosion but also keeps the nutrients in the soil from sun damage/exposure. The third is a company wide recycling program that recycles anything, especially drip tape and cardboard. The fourth is crop rotation. Crop rotation is extremely important to keeping the soil protected and healthy. Bonipak uses cover crops to keep the biological balance of the land in tact. Lastly, is the Internal PCA/Testing and Spray Facilities. These facilities control levels to the lowest essential applications needed to produce the highest quality produce. Integrated Pest Management allows for low to no use of pesticides keeping the produce organic. In-house lab testing ensures that optimal soil quality and minimal inputs are used again for a natural taste and no water pollution. With all of these practices in mind, Bonipak is an enabler for what environmentally conscious and safe farming practices should be. As an industry leader, Bonipak continues to be profitable, meanwhile succeeding in the field of sustainability.

Community and Labor Support

Having been apart of the Santa Maria community for 67 years, Bonipak has had multiple opportunities to give back to their community. With 500 hired personnel, Bonipak is currently one of the largest employers in Santa Maria. To give back to their workers and the community, Bonipak offers scholarships to their employees to be able to attend Allan Hancock College. However, there is often a shortage of laborers in Santa Maria, which Bonipak counters by working with H2-A. Bonipak works hard to not only provide a great working environment, but also quality living arrangements. Bonipak has recently purchased a motel, which allows for low cost living in Santa Maria for their employees. Mitch Ardantz, an owner of Bonipak, as also been leading the Curletti Project, which is a living development for over 600 H2-A workers in the Santa Maria area. By doing this, Bonipak hopes to secure a stable labor source for Santa Maria farming.

Hardships

The difficulty with the produce industry is that many of the problems crushing growth are naturally occurring. In California, for example, weather is a huge problem. Bonipak is no novice to the impact of weather. In the Winter of 2017, California experienced over 200 inches of rain across the state resulting in the flooding/saturation of many low lying fields. Bonipak felt the effects of this flooding, as many of the acreage for planting became too moist or unplatable. To date, Bonipak has only 70% production of what they have had for years prior. Another hardship is differentiation. According to First Research, there are over 14,000 producers of fresh produce in the world. Therefore, being able to carve out a niche and grab a chunk of the market can be very challenging. In California alone, are two of the top three U.S. fresh produce producers in Taylor Farms at 3 billion and Grimmway Farms at 1.5 billion (First Research). Bonipak sought and maintained its competitive nature by offering superior customer service. With everyone selling the same produce, customer service is one way Bonipak has kept the satisfaction of the most vital component of its business, the customer.

Future of Bonipak

Bonipak's number one goal moving forward is to maintain positive sales relations with their customers, specifically the big ten. By working with the big ten and finding out what new products are increasing in demand, Bonipak hopes to increase their product line. Currently, Bonipak is looking at new products in two ways, value-added and raw commodities. Peppers and strawberries are two markets Bonipak is actively looking to engage in. Driscoll's has proven that Santa Maria is able to produce high quality strawberries and Bonipak wants to cut into the market share. BoniFresh is also looking to increase their product line through a variety of value-added products. They also hope to increase the efficiency of processing in hopes to reduce production cost, helping profit margins. Bonipak's cooler already has permits for another expansion. In order to need this expansion, however, Bonipak plans to both purchase and rent more land in the Santa Maria Valley. With the expansion of value-added products and more diversification in Bonipak's raw product line, this expansion could break ground in the very near future.

Figure 1: U.S. Vegetable Industry Overview

Table 1—U.S. vegetable industry at a glance, 2009-12					
Item	Unit	2009	2010	2011	2012 1/
<i>Area harvested</i>	1,000 ac.	6,617	6,989	5,709	6,638
<i>Vegetables:</i>					
Fresh (excl melon)	1,000 ac.	1,487	1,486	1,489	1,481
Processing	1,000 ac.	1,264	1,170	1,076	1,100
Potatoes	1,000 ac.	1,044	1,008	1,077	1,137
Dry beans	1,000 ac.	1,464	1,843	1,168	1,696
Other 2/	1,000 ac.	1,358	1,483	899	1,224
<i>Production</i>	Mil. cwt	1,261	1,198	1,190	1,250
<i>Vegetables:</i>					
Fresh (excl melon)	Mil. cwt	360	354	353	354
Processing	Mil. cwt	391	352	340	345
Potatoes	Mil. cwt	433	404	430	467
Dry beans	Mil. cwt	25	32	20	32
Other 2/	Mil. cwt	52	56	47	53
<i>Crop value</i>	\$ mil.	18,217	18,153	18,278	17,469
<i>Vegetables:</i>					
Fresh (excl melon)	\$ mil.	10,009	10,066	10,050	8,573
Processing	\$ mil.	2,141	1,698	1,800	1,863
Potatoes	\$ mil.	3,558	3,722	4,003	3,819
Dry beans	\$ mil.	790	887	694	1,342
Mushrooms	\$ mil.	959	924	1,018	1,099
Other 2/	\$ mil.	760	856	713	773
<i>Unit value 3/</i>	\$/cwt	14.45	15.15	15.35	13.97
<i>Vegetables:</i>					
Fresh (excl melon)	\$/cwt	27.80	28.45	28.44	24.25
Processing	\$/cwt	5.48	4.82	5.29	5.40
Potatoes	\$/cwt	8.22	9.21	9.31	8.18
Dry beans	\$/cwt	31.08	27.88	34.87	42.25
Other 2/	\$/cwt	33.06	31.78	36.83	35.32
<i>Trade</i>					
<i>Imports</i>	\$ mil.	7,969	9,158	10,269	10,192
<i>Vegetables:</i>					
Fresh (excl melon)	\$ mil.	4,061	5,052	5,570	5,095
Processing 4/	\$ mil.	2,149	2,295	2,575	2,650
Potatoes & products	\$ mil.	1,012	997	1,124	1,198
Dry beans	\$ mil.	134	140	165	180
Other 5/	\$ mil.	613	674	835	1,069
<i>Exports</i>	\$ mil.	5,172	5,629	6,072	6,091
<i>Vegetables:</i>					
Fresh (excl melon)	\$ mil.	1,682	1,900	1,960	1,600
Processing 4/	\$ mil.	1,178	1,240	1,395	1,450
Potatoes & products	\$ mil.	1,179	1,255	1,512	1,695
Dry beans	\$ mil.	306	305	285	425
Other 5/	\$ mil.	827	929	919	921
<i>Per capita use</i>	Pounds	392	397	383	395
<i>Vegetables:</i>					
Fresh (excl melon)	Pounds	141	145	143	143
Processing	Pounds	122	120	112	119
Potatoes & products	Pounds	114	114	110	114
Dry beans	Pounds	6	7	6	6
Other 2/	Pounds	10	12	12	13

1/ ERS forecasts. 2/ Includes sweet potatoes, dry peas, lentils, and mushrooms (except for crop value). 3/ Ratio of total value to total production. 4/ Includes canned, frozen, and dried. Excludes potatoes, pulses, and mushrooms. 5/ Other includes mushrooms, dry peas, lentils, sweet potatoes, and vegetable seed. All trade data are on a calendar-year basis.
Note: Cwt = hundredweight, a unit of measure equal to 100 pounds.

Figure 2: Top 25 Vegetable Growers in the West (2014)

Rank	Company	HQ State	Acreage	Acreage Change	Year Founded	Crops	Previous Rank
1	Grimmway Enterprises	CA	57,787	4,692	1968	beans, carrots, potatoes, mixed organic vegetables	1
2	D'Arrigo Bros. Of California, Inc.	CA	36,847	3,047	1927	fennel, broccoli, cauliflower, mix lettuce, head lettuce, Romaine	2
3	Tanimura & Antle	CA	25,527	-3,854	1982	anise, artisan lettuce, Romaine, beets, bok choy, broccoli, cauliflower, celery, cilantro, endive, escarole, kale, leeks, lettuce, napa, parsley, spinach, strawberries	3
4	Ocean Mist/Boutonnet Farms	CA	24,890	N/C	1935	broccoli, cauliflower, celery, fennel, head lettuce, mix lettuce, spinach, artichokes, other	4
5	J.G. Boswell	CA	20,000	N/C	1925	tomatoes	5
6	Nunes Vegetables, Inc.	CA	19,223	663	1976	lettuce, cauliflower, celery, broccoli, leaf lettuce, Romaine, green onions, asparagus, strawberries, organic vegetables	6
7	Rio Farms	CA	17,644	394	1978	carrots, celery, cole crops, leafy vegetables, mustard greens, onions, parsley, peppers, spinach bok choy, broccoli, carrots, cauliflower, cilantro, endive, frisee, head lettuce, napa, parsley, Romaine, spinach, spring mix, garlic, peppers, fennel, organic vegetables, organic strawberries	7
8	Mission Ranches	CA	15,645	N/C	1988	cantaloupe, honeydew, watermelon, tomatoes, lettuce, onions	10
9	Dresick Farms, Inc.	CA	14,500	N/C	1974	green cabbage, leaf lettuce, Romaine, head lettuce, spinach, broccoli, cauliflower, celery, bok choy, napa, beans, cilantro, fennel	9
10	Betteravia Farms	CA	13,111	-2,320	1932	potatoes, corn, onion	12
11	Agrinorthwest	WA	13,000	N/C	1969	onions, spinach, broccoli, asparagus, strawberries, sweet corn, celery, radishes, cilantro	12
11	Boskovich Farms	CA	13,000	N/C	1915	potatoes	11
13	Larsen Farms	ID	12,900	-149	1969	celery, leafy greens, peas, spinach, squash, tomatoes, iceberg lettuce, artichokes, broccoli, cauliflower	14
14	R.C. Farms LLC	CA	10,467	-306	1971	onions	23
15	River Point Farms	OR	10,100	4,572	2007	potatoes	15
16	Wada Farms	ID	10,000	N/C	1942	lettuce, broccoli, cauliflower, celery, onions, carrots, strawberries	18
17	Merril Farms	CA	9,090	1,090	1933	lettuce, cauliflower, broccoli, celery, cabbage, Romaine	16
18	Royal Packing Co	CA	8,310	N/C	1948	celery, cole crops, leafy greens, peas, spinach, other	17
19	Bengard Ranch	CA	8,247	N/C	2005	carrots, beans, corn, potatoes, garlic, onions, other	22
20	Mercer Canyons	WA	7,301	601	1968	broccoli, head lettuce, baby greens, mache, organic vegetables	19
21	American Farms LLC	CA	7,019	N/C	1985	potatoes, sweet corn	20
22	Greenridge Farming	WA	7,000	N/C	1976	potatoes, sweet corn	20
23	Christiansen & Giannini	CA	6,800	N/A	1972	carrots, cole crops, leafy greens, onions, peppers, spinach, tomatoes	N/A
24	Harris Farms	CA	5,322	-1538	1937	asparagus, broccoli, cabbage	21
25	Neil Bassetti	OR	4,900	N/C	1930	iceberg lettuce, Romaine, mix leaf, spinach, celery, cauliflower, broccoli, asparagus, onions, peppers,	24

Figure 3: Sales in Fresh Produce Industry

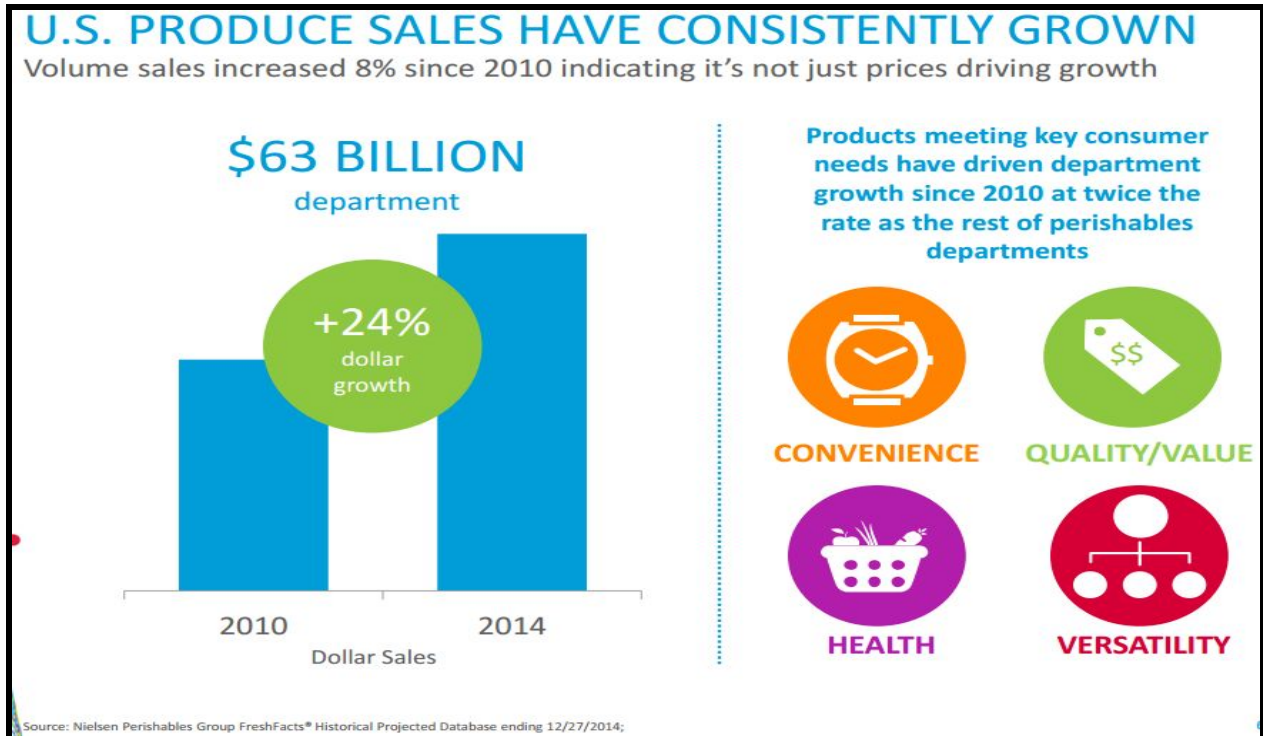


Figure 4: Main Department Stores in Fresh Produce Industry

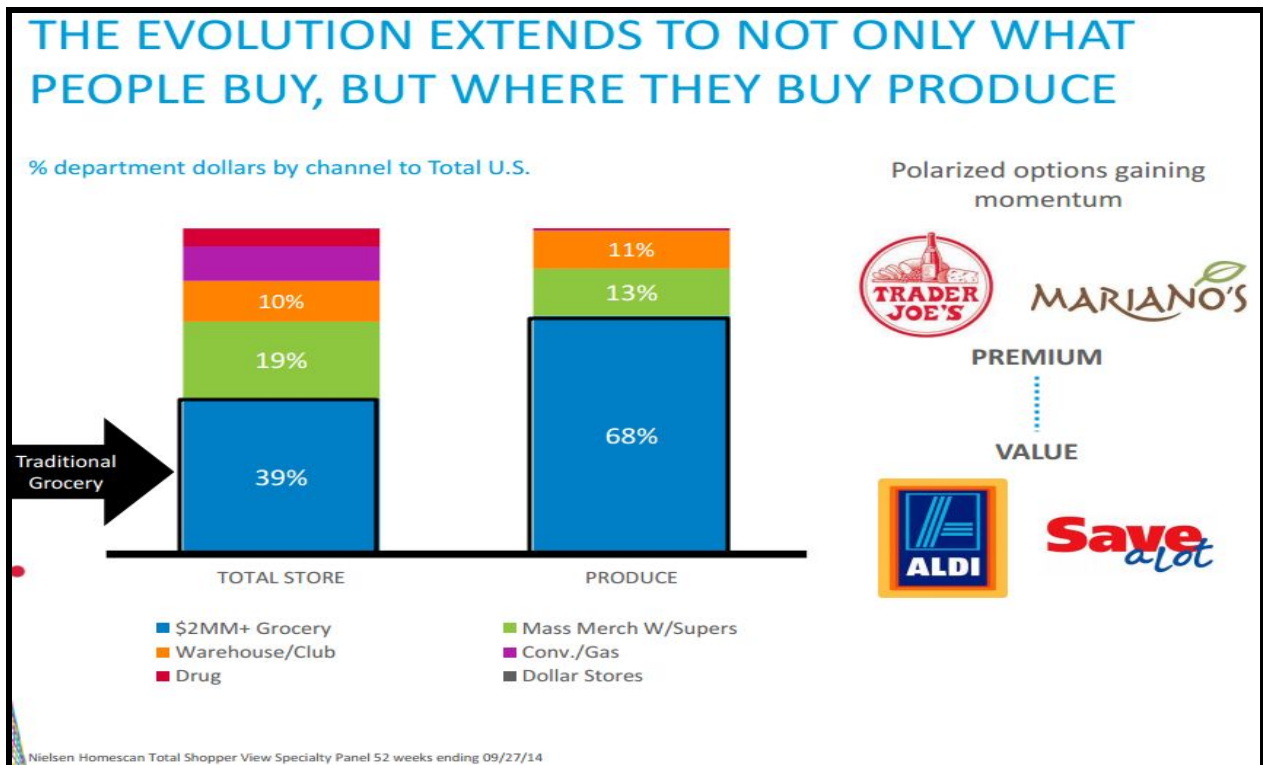


Figure 5: Bonipak Cooler Distance



Figure 6: Bonipak Cooler Expansion



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