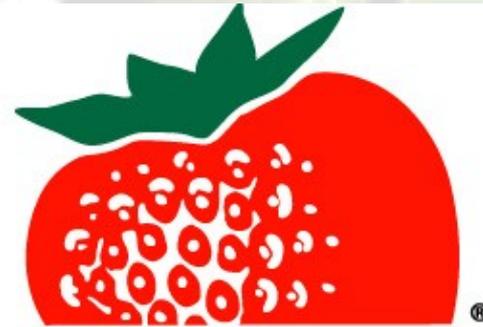


Driscoll's[®]

The Finest Berries in the World.[®]



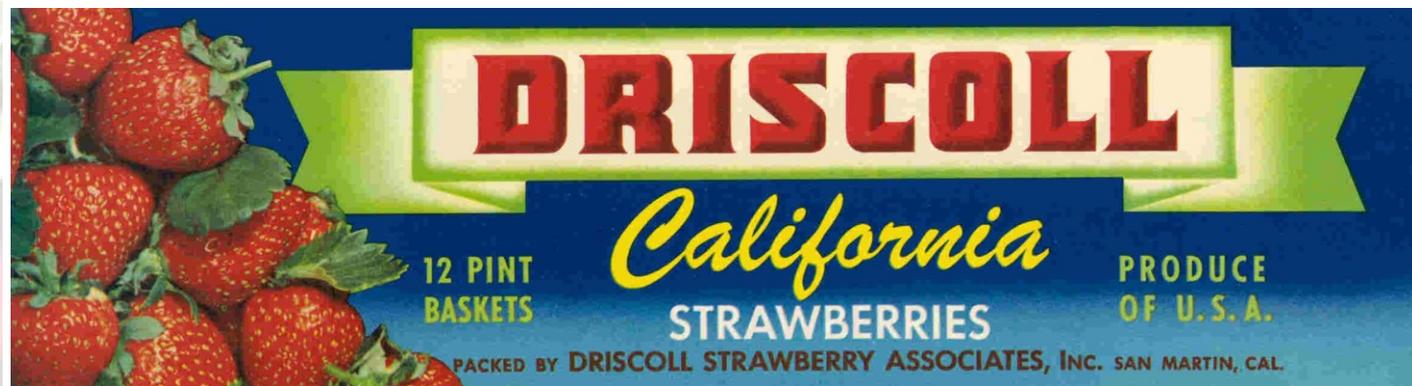
FIA Presentation

5 December 2002

AGENDA

- ◆ ***DRISCOLL'S HISTORY AND MISSION STATEMENT***
- ◆ ***PRODUCT AVAILABILITY AND SOURCING***
- ◆ ***SALES STRATEGY AND RETAIL CONSOLIDATION***
- ◆ ***THE DRISCOLL'S DIFFERENCE***

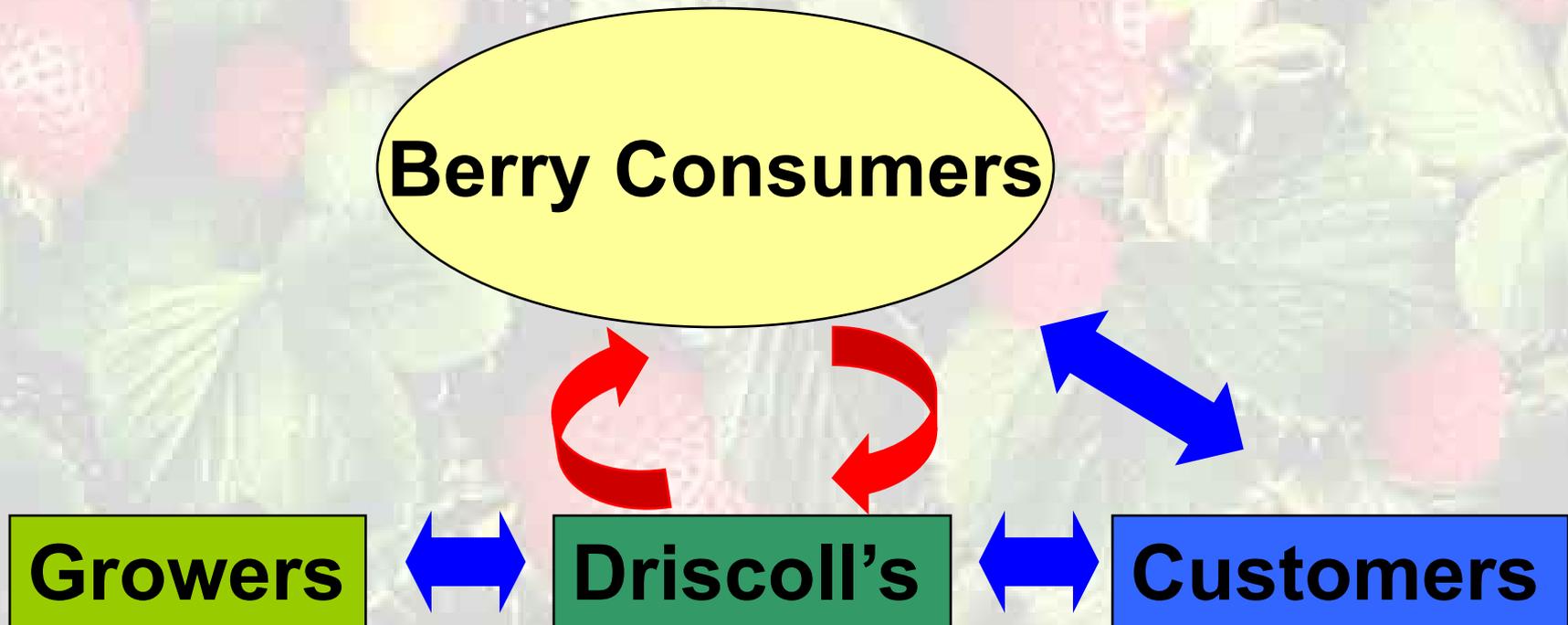
The Driscoll Heritage



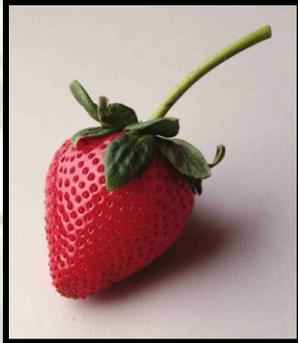
- ◆ **Original Driscoll Family Founded**
- ◆ **Quality Differentiation Dating Back to *1900* with the *Banner Strawberry***
- ◆ **Patented Proprietary Strawberry Program Established c.1945**

Mission Statement

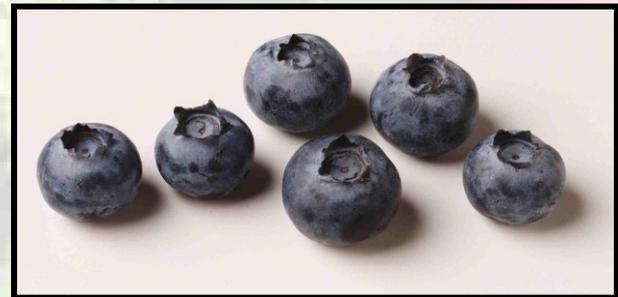
To continually delight Berry Consumers through alignment with our Customers and our Berry Growers.



Berry Patch



Complete Berry Category Assortment



Product Availability

JAN FEB MAR APR MAY JUN JUL AUG SEPT OCT NOV DEC

Strawberries



Raspberries



Blackberries



Blueberries



Sourcing and Distribution Locations

North America

South America



Sales Strategy and Customer Segmentation

Growers

Driscoll's

Sales

RETAIL

FOODSERVICE

EXPORT

WHOLESALE

Retail Consolidation

- ◆ Top 5 Companies represent 29% of all U.S. Supermarket Sales
- ◆ Driven by Wal-Mart, declining store profits, economies of scale, value of new locations
- ◆ Over 25 large store mergers in the U.S. in 1998
- ◆ Trend expected to continue...

Retail Consolidation (cont.)

◆ Challenges:

- ◆ Limited number of buyers
- ◆ Retail Buying Personnel continually change
- ◆ More power in fewer hands
- ◆ Larger supply requirements - seeking 2-4 shippers
- ◆ Retail Decision Makers challenged to keep in touch with marketplace

The “Driscoll’s Difference”

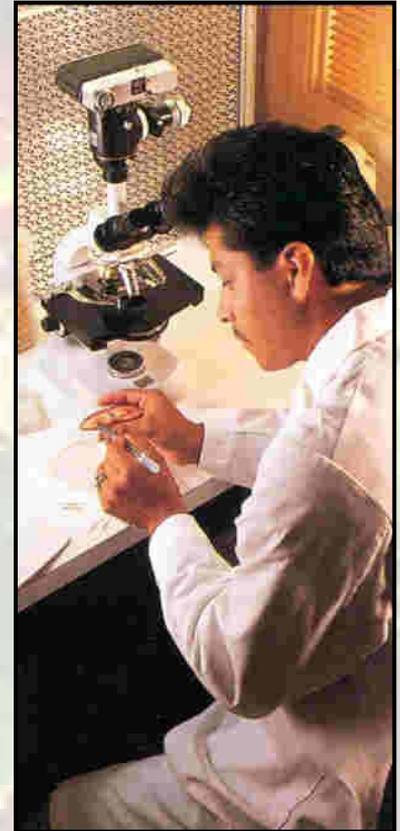
- ◆ **Year-Round Single Source Berry Patch**
- ◆ **Research & Development**
- ◆ **Food Safety**
- ◆ **Quality Assurance**
- ◆ **Consumer Affairs**

Research & Development

World's largest proprietary berry development program

**Varieties Selected Based on
*Consumer Preference***

- **Flavor**
- **Color**
- **Quality**



Food Safety

◆ **All Product Locations certified and monitored by PRIMUS**

◆ **Pesticide Monitoring Program**

- **Mandatory Weekly Reporting**
- **Random Third Party Auditing**

◆ **Microbiological Irrigation Water Source Testing**

◆ **Customer Access to Data Via Web Access**



Quality Assurance

- ◆ **Largest Private Q/A Program in Berry Category**
- ◆ **Inspections at Cooler Facility**
- ◆ **Grower feedback mechanism**

Consumer Affairs

- ◆ **100% Satisfaction Guarantee at Consumer Level**
- ◆ **High Frequency of Contacts**
 - **1-800 number**
 - **e-mail**
 - **consumer web site**
 - **written letters**

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