

Trends in Global Berry Business & Position of Ukraine

Dutch Trade Mission to Ternopil
'Fruit & Berries Global Business'
Introduction by Benno Grimberg
Coordinator PIB FoodTechLink Ukraine
25 June 2018, Ternopil, Hotel Ternopil



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- PIB FoodTechLink Ukraine
- Trends in Global Berry Business
- Case: Mexico
- Position of Ukraine
- Appearance & Shelf Life

Contents II

- Market Research & Benchmarking
- Innovations in Equipment
- Ukraine Promotion & Marketing
- Conclusions

FOCUS ON FOUR INDUSTRIAL SECTORS

- Fruit & Vegetables
- Industrial Bakeries
- Dairy
- Meat



PIB FOODTECHLINK UKRAINE: PRIVATE PARTNERS

Grimco Trade Holland®

DIFCO
INTERNATIONAL

AQUA
member of MPS

WIGS

dutnion

Elpress

W e van wijk

Used Refrigeration Equipment
HOS
Import and export

JASA
PACKAGING SYSTEMS

Kiremko
Food Processing Equipment

LEKKER KERKER
- SINCE 1996 -
dairy & food
equipment

LS

T

marel
MEAT

**MUSH
COMB**
flexible new machinery

**OMORI
EUROPE**

oost nv

PLASTIC FROST®

rbk group
COMPETITIVE FOOD CHAIN CONCEPTS

SOLIDUS
SOLUTIONS

sormac

Tolsma
Storage Technology
Grisnich
Members of the Tolsma-Grisnich Group

Unifreezing
FOOD PROCESSING TECHNOLOGY

van Abeelen
KOUDE- & KLIMAATOPLOSSINGEN
Gegarandeerd Cool !!

THE NETHERLANDS



Provincial capitals in red

A Wikipedia Map

Trends in Global Berry Business

2016 World Highbush Production by Region

000 Metric Tons	2012			2014			2016		
	FR	PR	Total	FR	PR	Total	FR	PR	Total
North America	155.3	116.8	272.1	184.6	145.6	330.2	174.3	174.1	348.3
South America	86.5	37.1	123.6	90.7	30.9	121.6	124.5	37.6	162.1
Europe	41.1	3.5	44.6	60.9	3.6	64.5	73.2	6.9	80.1
Med. & N. Africa	2.5	0.0	2.5	6.8	0.3	7.1	12.1	0.4	12.5
Sub Saharan Africa	1.4	0.2	1.6	2.0	0.2	2.2	2.9	0.1	3.0
Asia & Pacific	17.2	4.6	21.8	30.9	6.5	37.4	38.6	10.5	49.1
TOTAL	303.9	162.3	466.2	376.0	187.0	563.1	425.5	229.5	655.0

2010

≈124k MT

≈97k MT

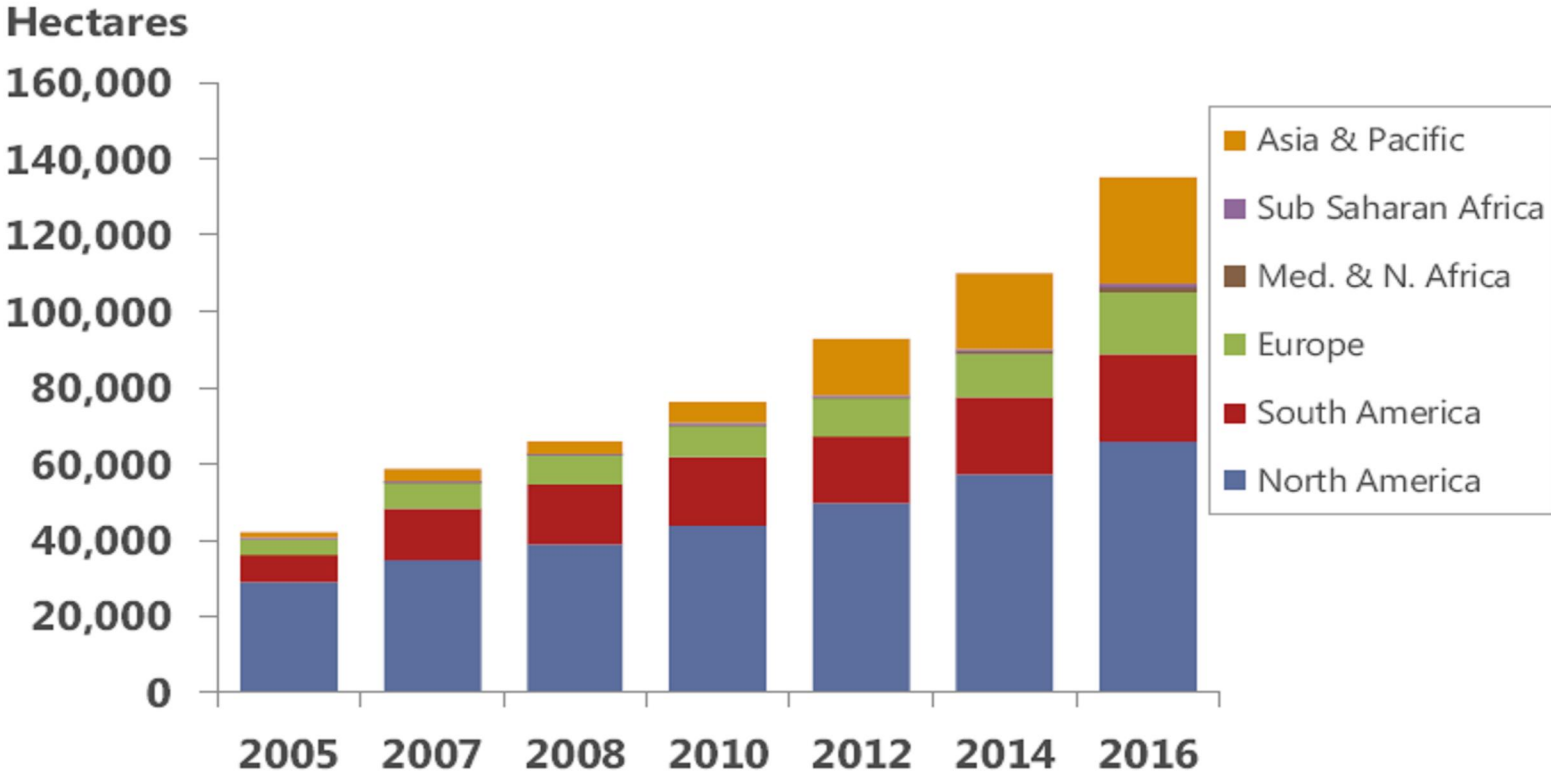
≈92k MT

2016 Worldwide Lowbush Production Wild Region

000 Metric Tons	2012			2014			2016		
	Fresh	Process	Total	Fresh	Process	Total	Fresh	Process	Total
Quebec	0.5	27.2	27.7	0.0	35.5	35.5	2.3	52.2	54.5
PEI	0.0	6.4	6.4	0.0	10.3	10.3	0.0	15.4	15.4
Nova Scotia	0.0	20.4	20.4	0.0	28.1	28.1	0.0	29.5	29.5
New Brunswick	0.0	15.9	15.9	0.0	27.2	27.2	0.0	37.7	37.7
New Foundland	0.0	0.5	0.5	0.0	0.5	0.5	0.0	1.0	1.0
Maine	0.2	45.4	45.6	0.2	47.2	47.4	1.8	46.7	48.5
China	0.5	4.1	4.5	0.5	5.4	5.9	0.4	7.0	7.4
Europe	1.8	17.7	19.5	1.8	9.1	10.9	1.5	11.0	12.5
Total Wild	2.9	137.5	140.4	2.5	163.3	165.8	6.0	200.5	206.5



2016 World Highbush Planting Growth by Region



Cort Brazelton & Kayla Young
© 2017 International Blueberry Organization



2016 World Highbush & Wild Production

Total Global Crop

000 Metric Tons	2012			2014			2016		
	Fresh	Process	Total	Fresh	Process	Total	Fresh	Process	Total
North America	155.9	232.5	388.4	184.8	294.4	479.2	178.4	356.6	535.0
South America	86.5	37.1	123.6	90.7	30.9	121.6	124.5	37.6	162.1
Europe	42.9	21.2	64.1	62.7	12.7	75.4	74.7	17.9	92.6
Med. & N. Africa	2.5	0.0	2.5	6.8	0.3	7.1	12.1	0.4	12.5
Sub Saharan Africa	1.4	0.2	1.6	2.0	0.2	2.2	2.9	0.1	3.0
Asia & Pacific	17.7	8.7	26.4	31.4	11.9	43.3	39.0	17.5	56.5
TOTAL	306.83	299.75	606.58	378.50	350.38	728.87	431.48	430.07	861.55

↑
≈51%

↑
≈49%

↑
≈50%

↑
≈50%

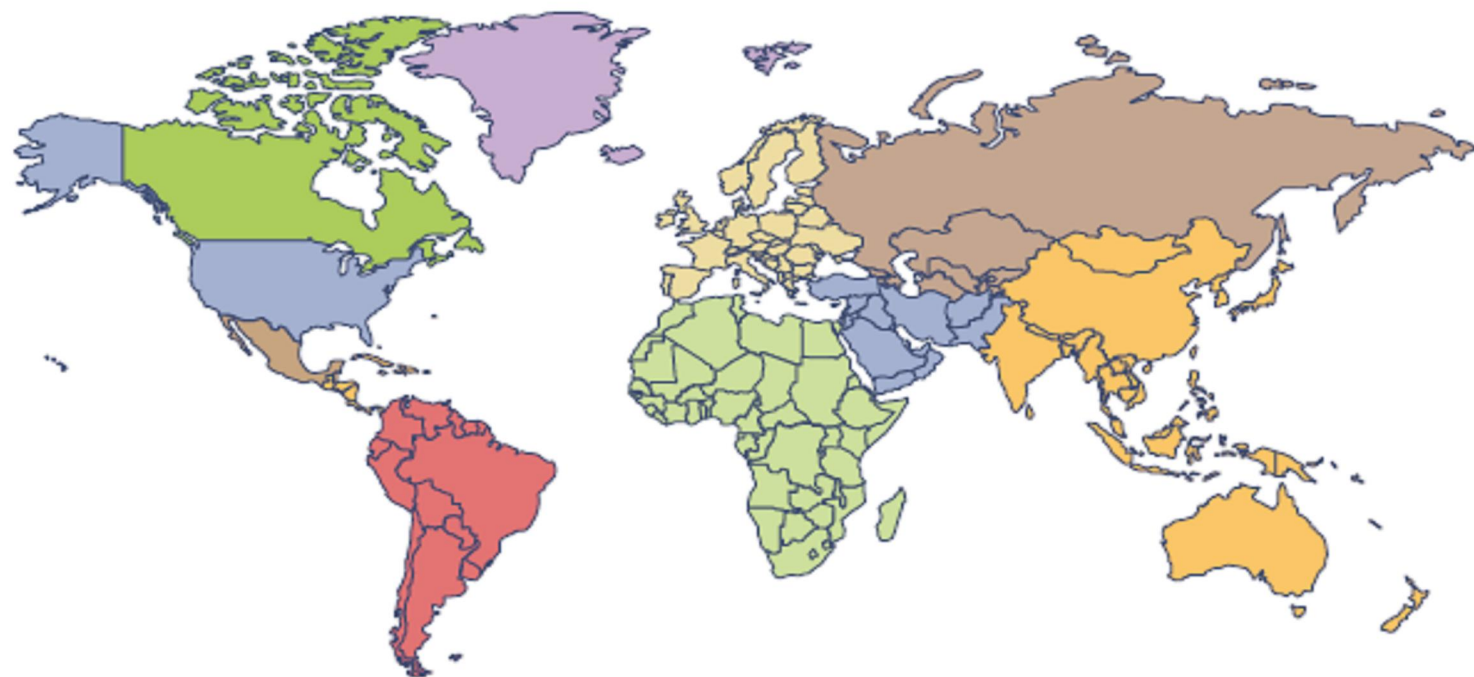
↑
≈50%

↑
≈50%

255k MT



Top Ten Countries



2016 (15/16 S. Hem.) Top Ten Highbush Production

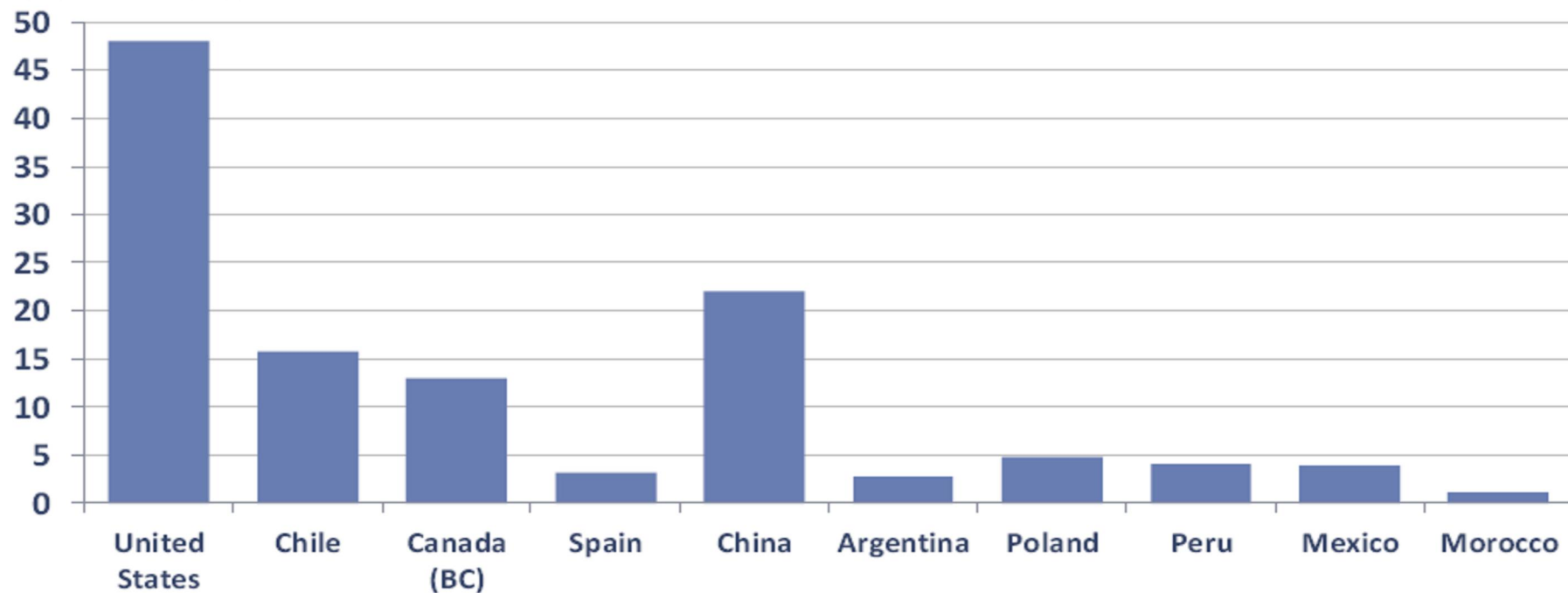
000 Metric Tons	2012			2014			2016		
	FR	PR	Total	FR	PR	Total	FR	PR	Total
United States	125.4	87.2	212.6	145.4	103.7	249.1	133.1	123.5	256.6
Chile	70.1	29.9	100.0	74.0	27.3	101.3	91.4	33.9	125.3
Canada (BC)	22.7	29.5	52.2	27.2	41.7	69.0	22.7	49.9	72.6
Spain	9.8	0.1	9.8	19.6	0.1	19.7	28.0	2.0	30.0
China	8.2	3.2	11.3	16.0	4.0	20.0	20.0	8.0	28.0
Argentina	14.2	6.4	20.6	12.6	2.9	15.4	14.9	3.0	17.9
Poland	10.1	1.5	11.7	14.0	1.5	15.5	15.0	1.0	16.0
Peru	0.1	0.0	0.1	2.0	0.0	2.1	15.4	0.4	15.8
Mexico	5.6	0.1	5.6	10.4	0.1	10.5	16.5	0.6	17.1
Morocco	2.2	0.0	2.2	6.4	0.2	6.7	11.4	0.3	11.7
Top 10 Total	268.3	157.9	426.2	327.7	181.5	509.2	368.4	222.6	591.0

90% of Global Production 

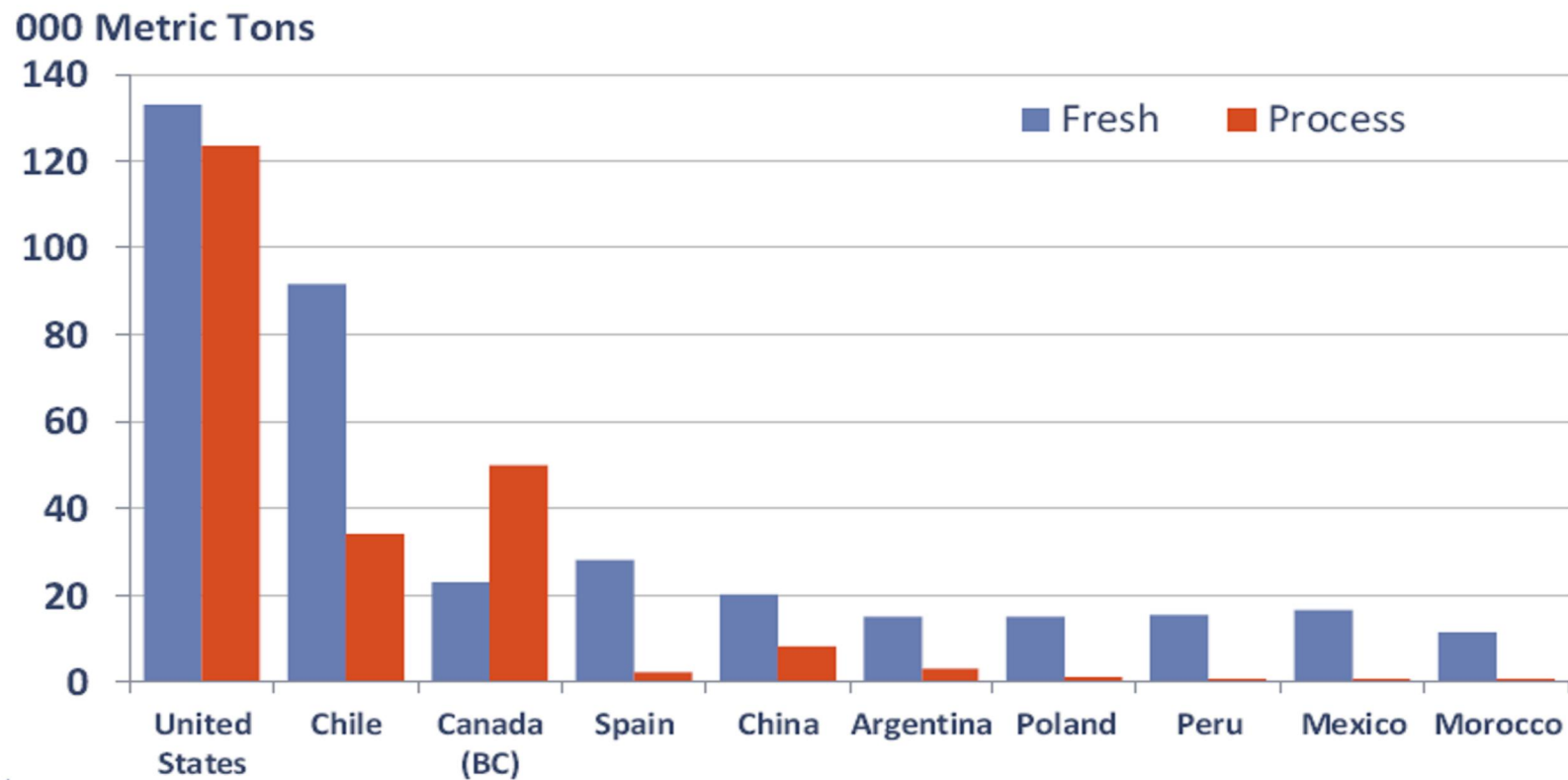


2016 Top Ten Planting by Country

Thousand Hectares

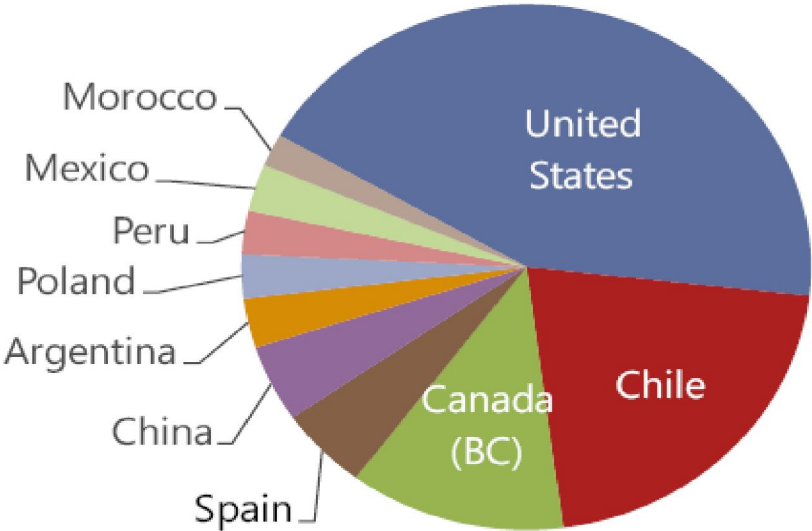


2016 Top Ten Highbush Production – Fresh vs. Process

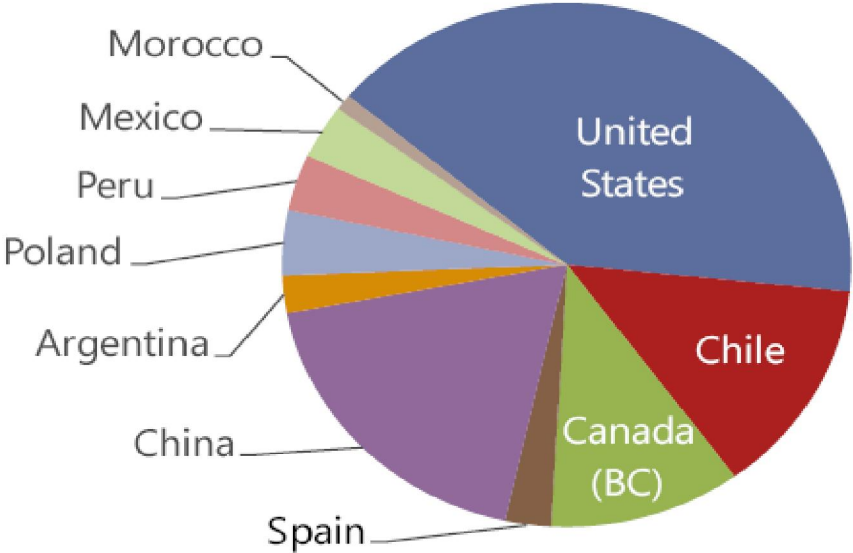


2016 Top Ten Highbush Production & Planting

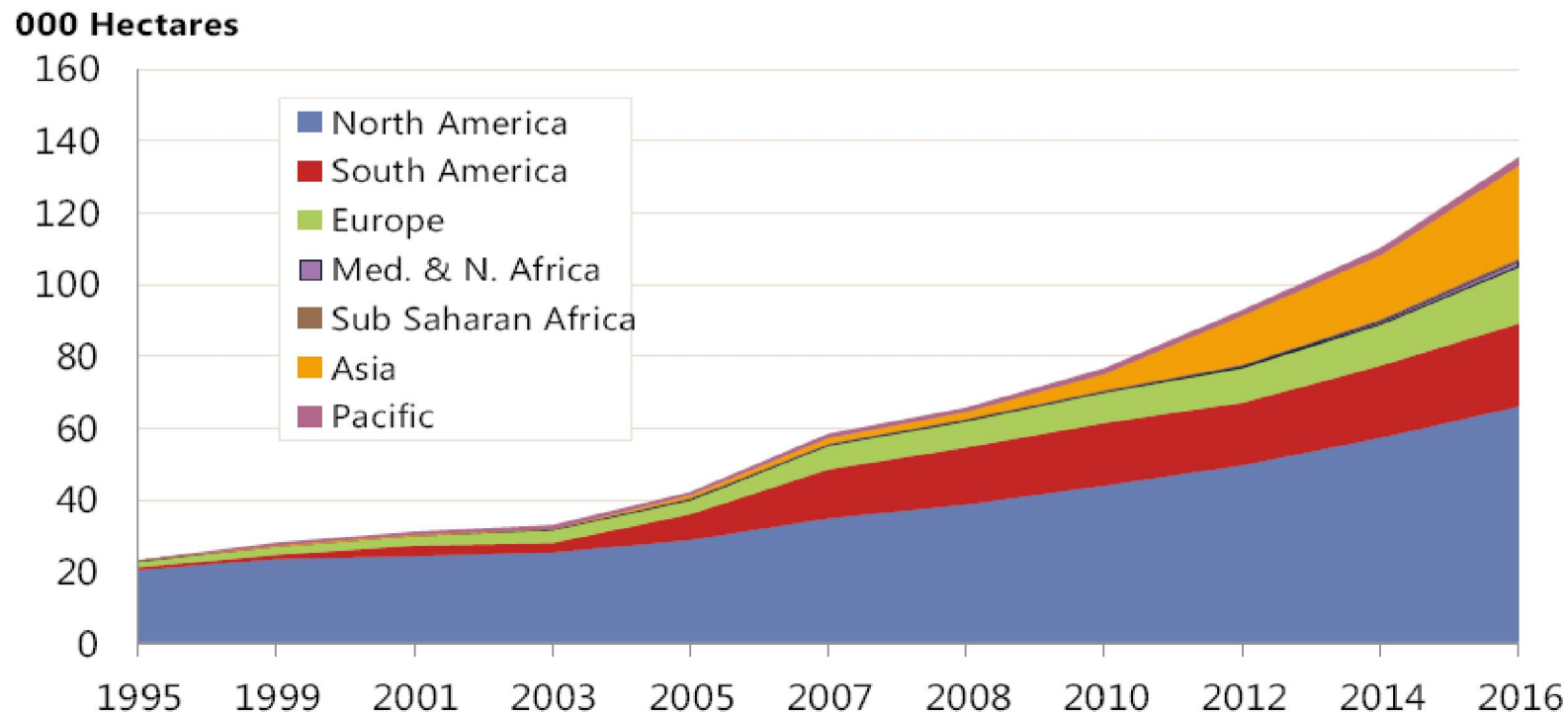
2016 World Top 10 Production



2016 World Top 10 Planting



World Highbush Planting Increases 1995 - 2016



Utilization* in Major Markets

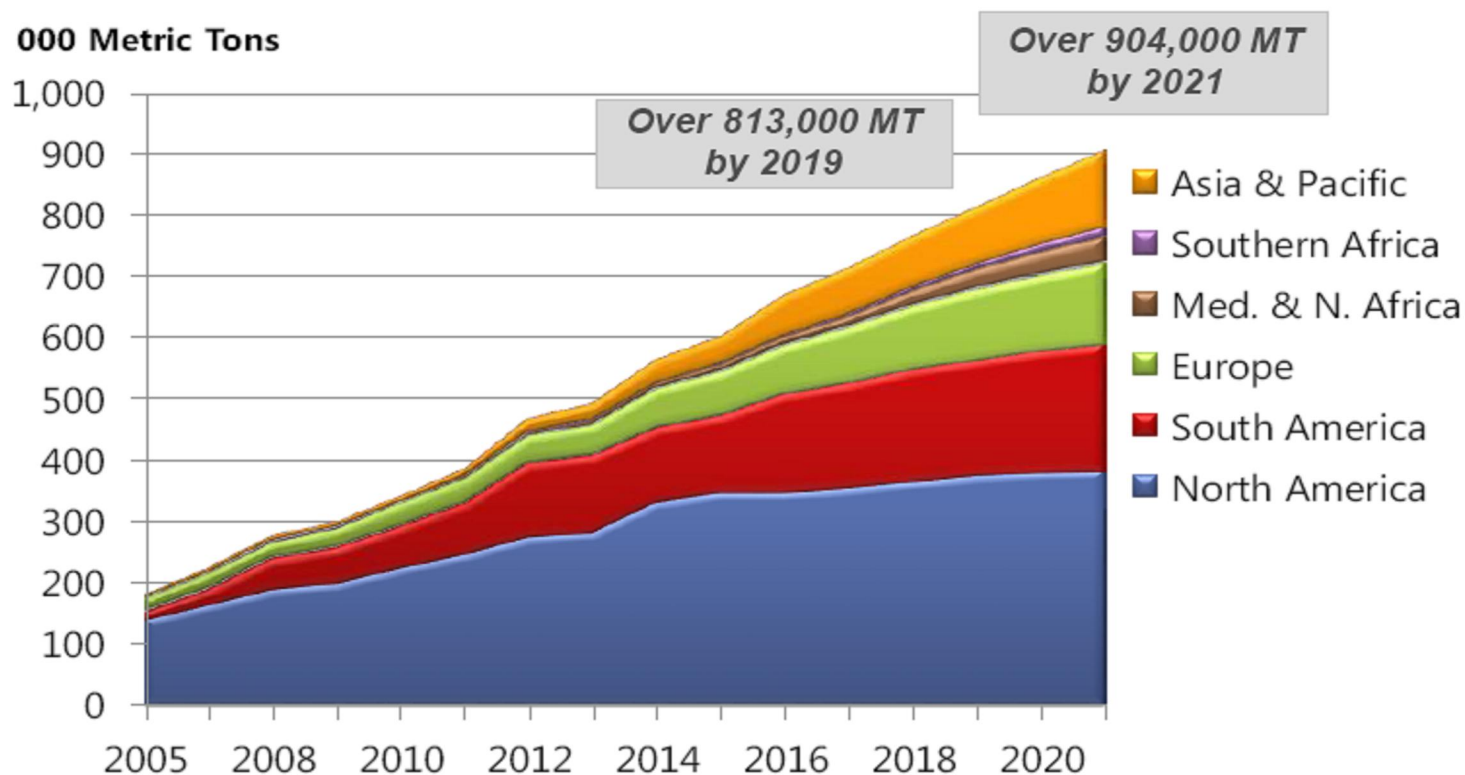
Three primary markets where fruit is consumed:

- North America
- Europe
- Asia | Pacific



**Utilization = Regional Production + Imports - Exports*

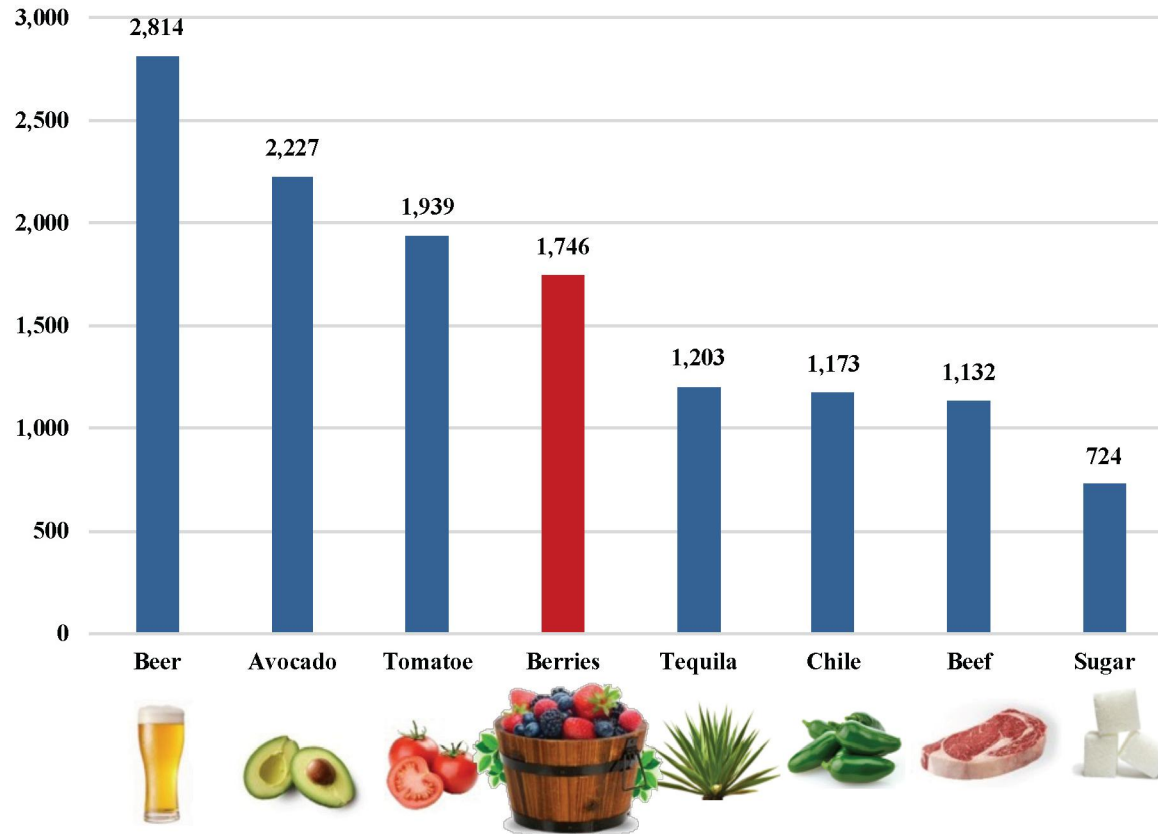
2016 World Highbush Production Growth Prediction



Trends in Berry Business Mexico

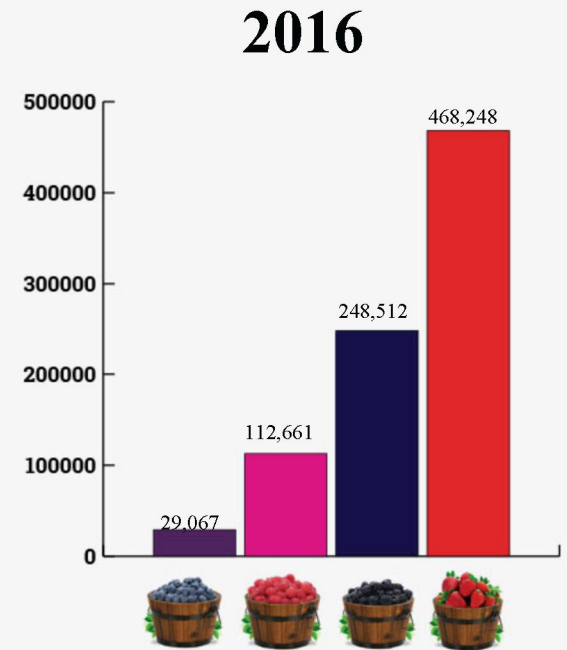
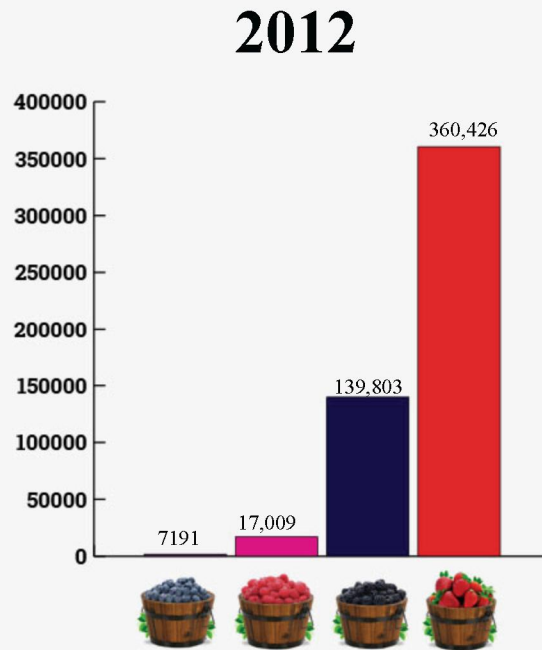
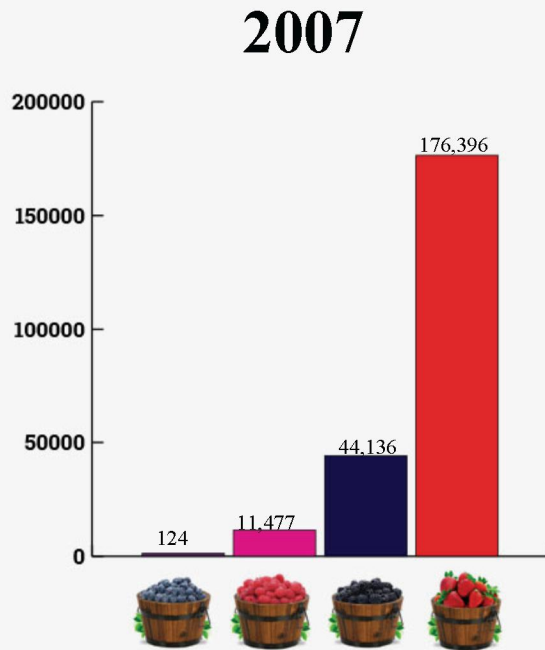
Main agricultural products exported in 2016

(Million Dollars)



Growth of berries in Mexico

Harvested (Tons)





Our Berries the best of the World.

Blueberries



18,031 tons.

Raspberries



35,627 tons.

Strawberries



458,972 tons.

Blackberries



152,992 tons.

\$1 746 millions dollars (2016)

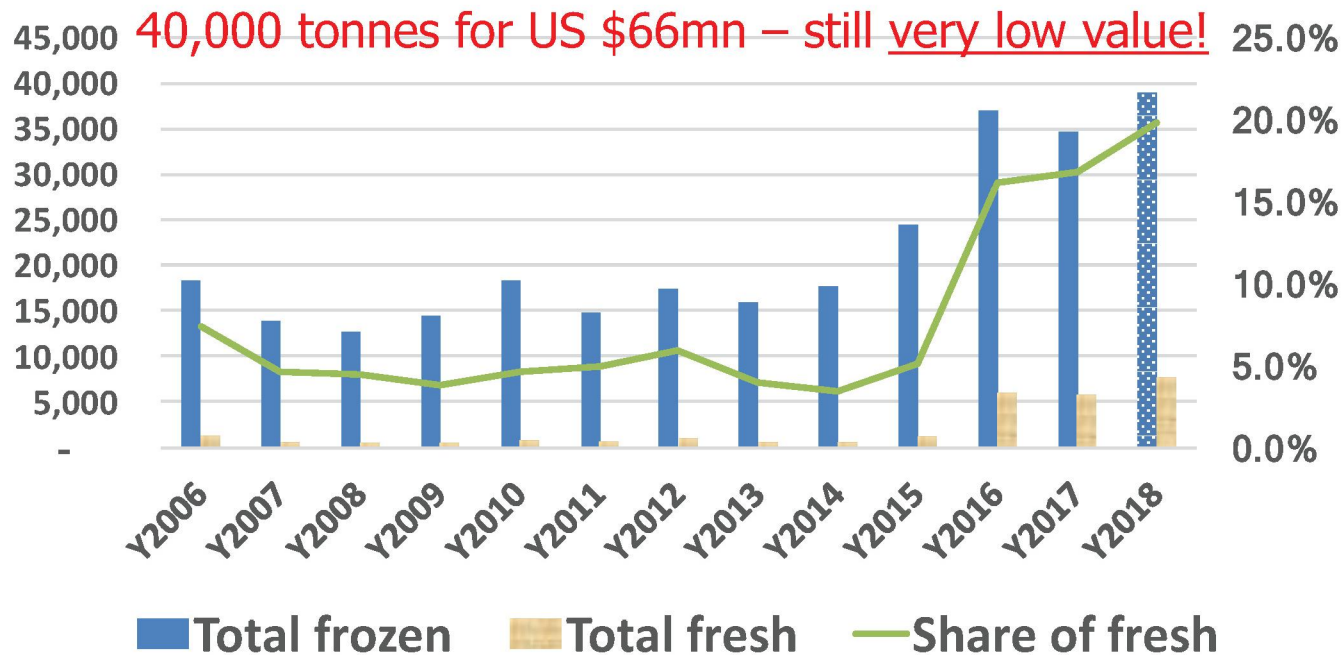
858 488 tons (2016)

Position of Ukraine



Ukraine: soft fruit exports

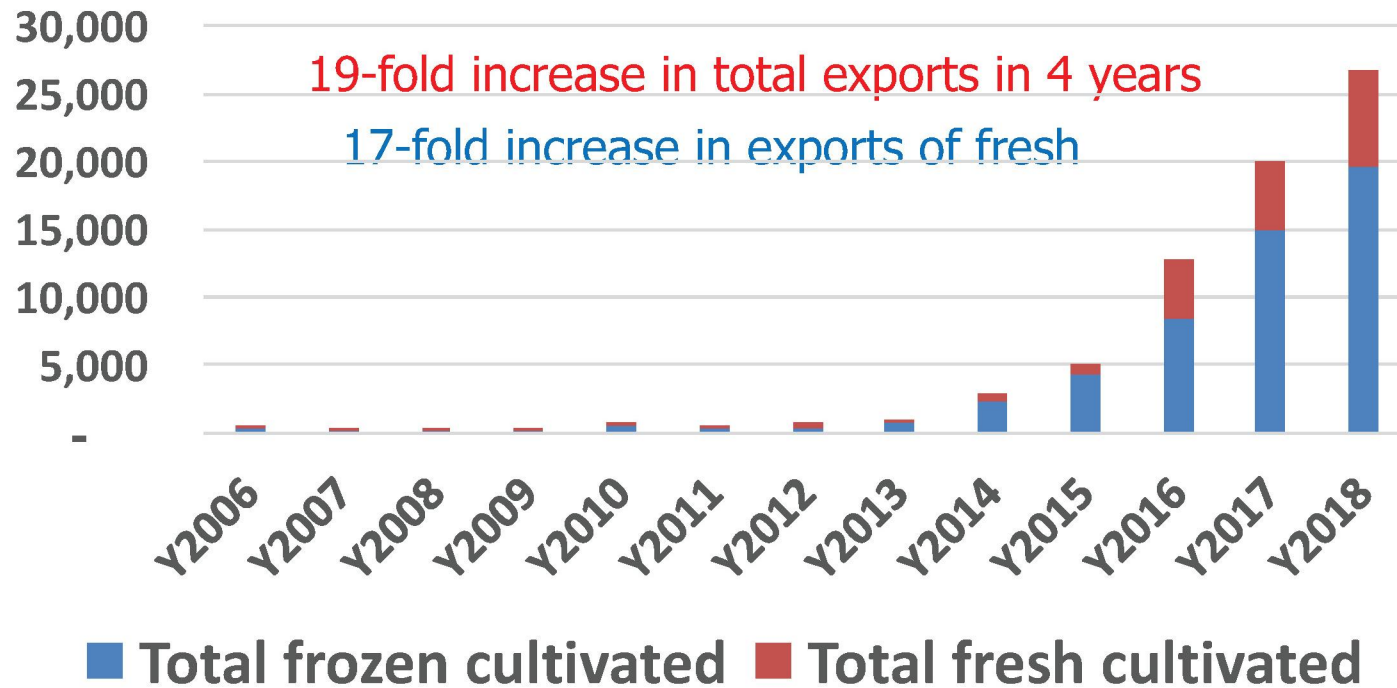
Exports of fresh and frozen soft fruits from Ukraine in 2006-2017 (2018 forecast), thousand tonnes





Ukraine: soft fruit exports (without wild berries)

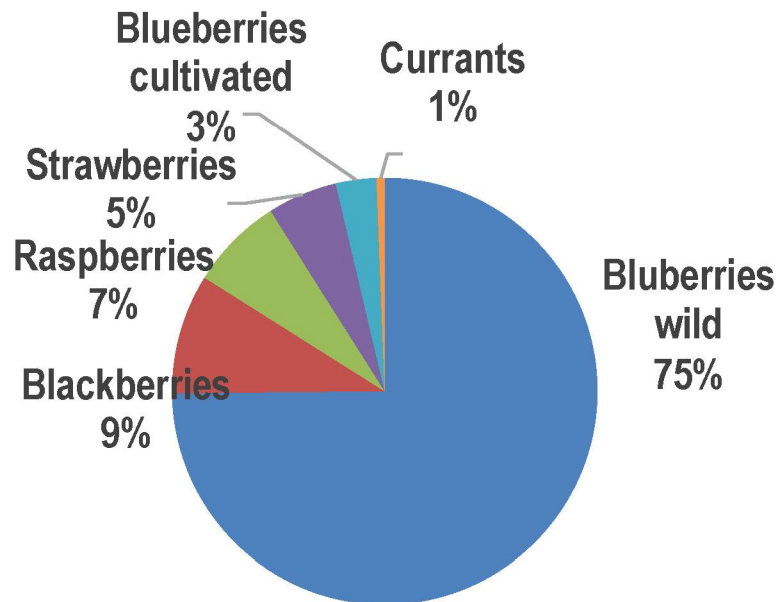
Exports of fresh and frozen soft fruits from Ukraine
in 2006-2017 (2018 forecast), thousand tonnes



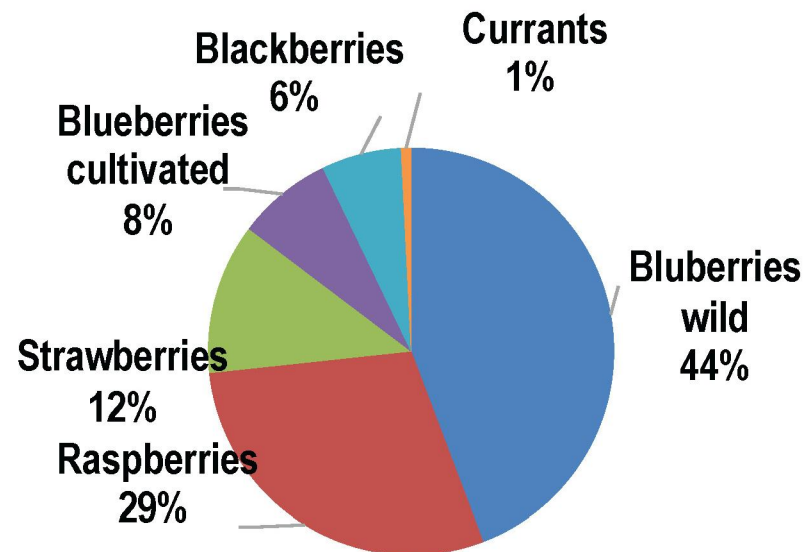


Ukraine: soft fruit export structure evolution

2014



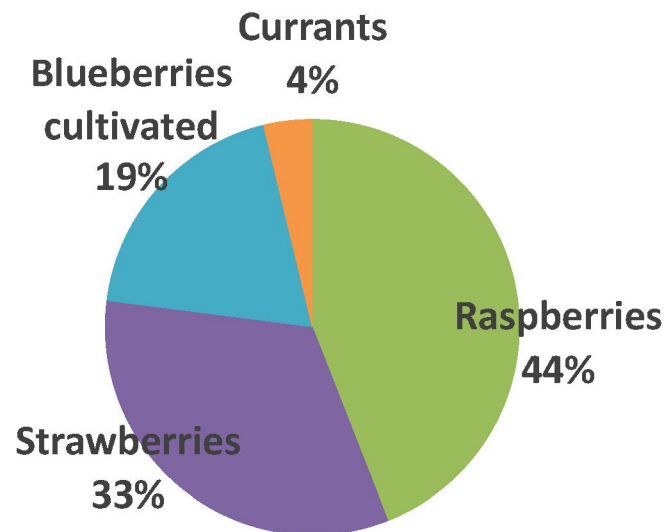
2017



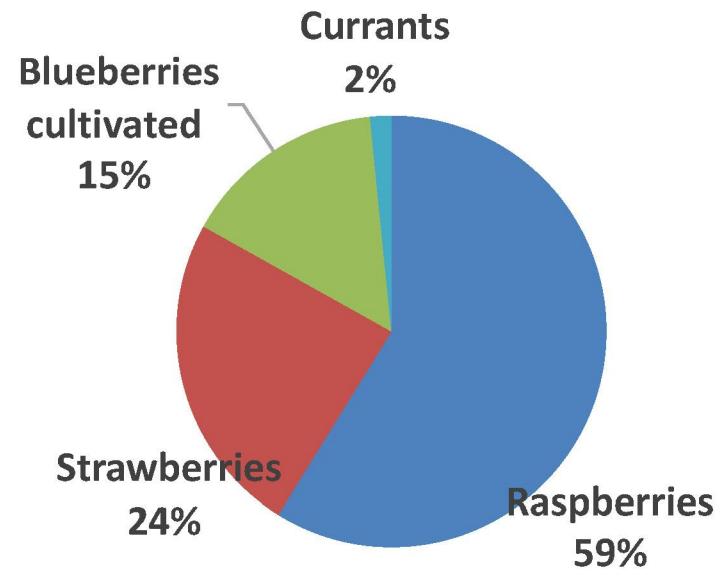


Ukraine: soft fruit export structure evolution (without wild berries)

2014



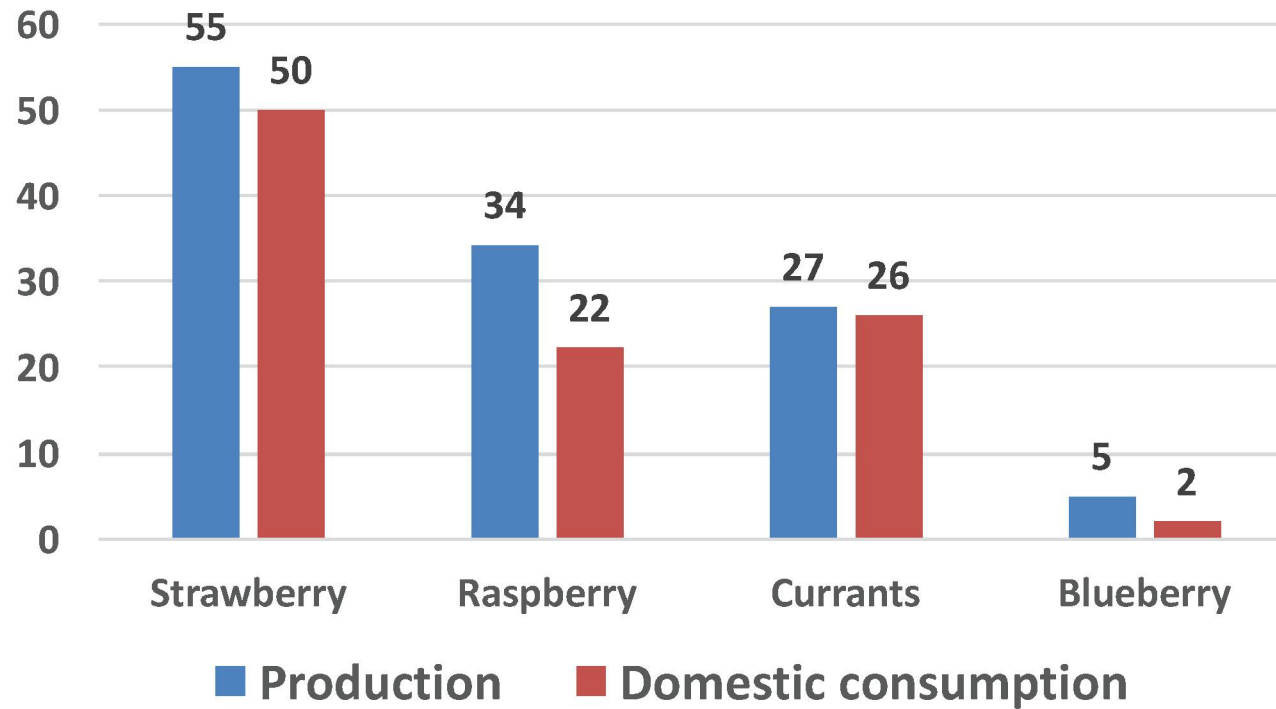
2017



Production of cultivated soft fruits in Ukraine reached 120,000 tonnes in 2017



Ukraine: production vs domestic use in 2017



Blackcurrant production in Europe

Blackcurrant production 2015

- Poland 140 000
- Ukraine 36 000
- United Kingdom 13 400
- France 8 000
- Germany 7 000
- Denmark 5 000
- Lithuania 3 500
- Netherlands 2 300
- Finland 1 200
- Norway 742
- Hungary 550
- Austria 155





Exports forecast for 2020

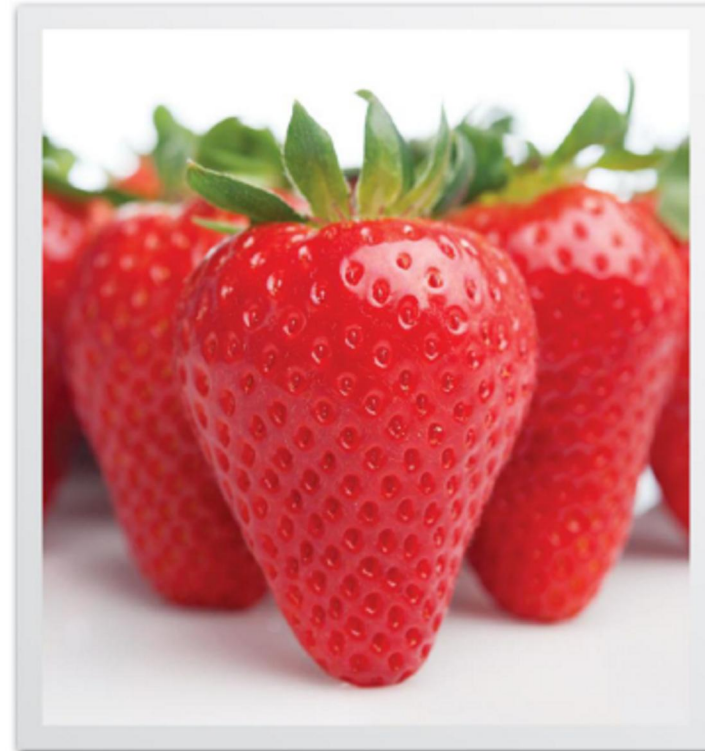
- Decline in exports of wild blueberries to around **15,000 tonnes**;
- Share of fresh berries in export volumes of cultivated berries to reach **40-44%** and value – to exceed **60%**;
- Total exports of cultivated soft fruits to reach **40,000 tonnes** (57,000 with wild);
- More than half of all exports by volume will be raspberry -**22-23 thousand tonnes**;
- The fastest increase in export volumes will be for blueberries;
- Development of honeysuckle exports.

Appearance & Shelf Life

Appearance & Shelf Life

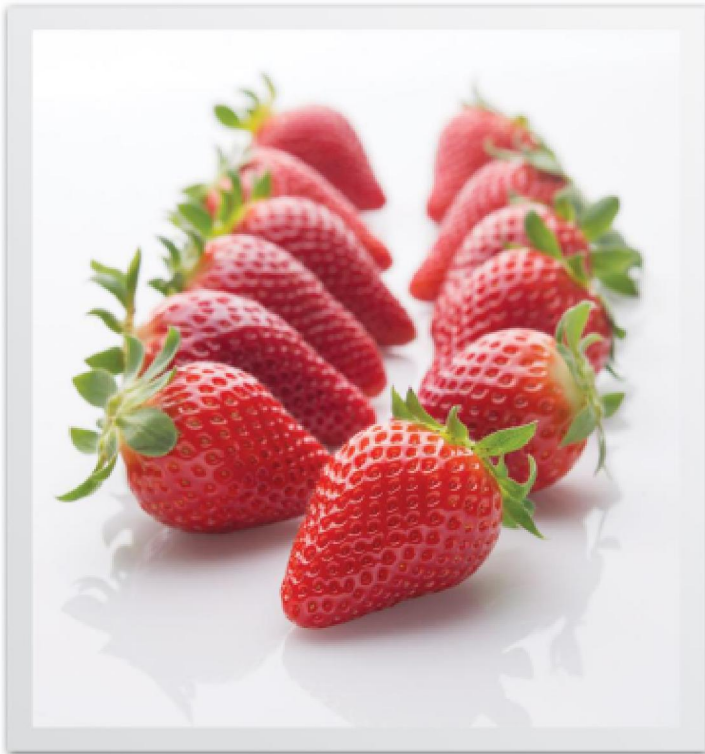


**Florida
Fortuna**



FL 05 107
Winterstar® Brand Fruit

Sensory Qualities



Characteristics

- High Sugars
- Moderate Acidity
- Fruit Aroma
- Large Size



Berry Cream

felicitaciones
mama! mom



Berry Cream



Bowl

Berry Bowl

PLUS Berries



Superberries

Superberries

Superberries
by plusberries

Post-harvest & Marketing





 **tcc**
bringing
loyalty
to life



Albert Hein in Rijswijk-NL: Snackfruit Strawberries



Jumbo Concept Store in Breda-NL: Raspberries from Morocco & Blackberries from Mexico



Jumbo Concept Store in Breda-NL: Softfruit Mix (3 varieties)



Jumbo Concept Store in Breda-NL: Berry Patch



Australia: Berry Patch (Concept)



Jumbo Concept Store in Breda-NL: Fresh Yoghurt & Berries



Jumbo Concept Store in Breda-NL: Fresh Yoghurt & Berries



Jumbo Concept Store in Breda-NL: Smoothies



Market Research & Benchmarking

Market Research & Benchmarking

- SIAL 2018 in Paris
- Fruit Logistica 2019 in Berlin
- Global Berry Conference 2019 in Rotterdam
- Anuga 2019 in Cologne (last in 2017)
- Interpack 2020 in Düsseldorf (last in 2017)
- Store Checks European Retailers
- Meetings with Traders in Soft Fruit

Innovations in Processing & Packaging Equipment

Octinion Strawberry Picking Robot



The image shows a white and green Octinion strawberry picking robot. It has a flatbed with three blue plastic crates on it. A green robotic arm with a gripper is mounted on the robot. The robot is positioned in front of a large white board that serves as a backdrop. The board features the Octinion logo and text. The background behind the board shows a greenhouse with strawberry plants.

OCTINION
Engineering the future

Strawberry picking robot

- Picking quality, picking speed and sorting quality like the ideal human picker
- Only picking if the action won't bruise strawberries
- Damage-free picking of 70% of all ripe strawberries
- Advanced quality monitoring to allow sorting, crop monitoring and precision farming

in collaboration with **FLANDERS MAKE** **PROFICIENTRUM BOODESTRATEN** **KU LEUVEN** with support of **AGENTSCHAP INNOVEREN & ONDERNEMEN**

Octinion Strawberry Picking Robot



Vriesvers fruit







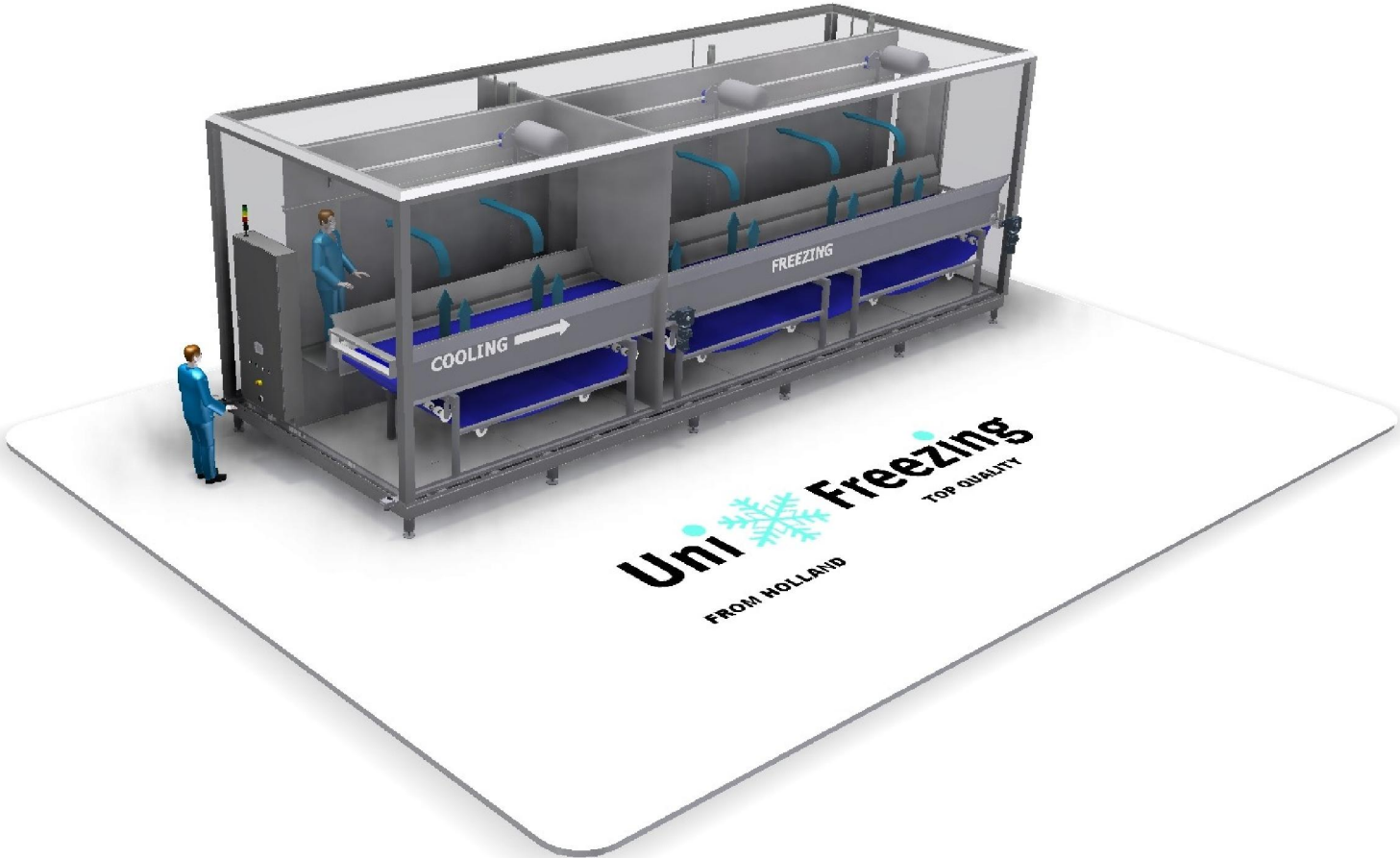
natuurlijk

per schepje (25g)	per 100g
56 kcal	43 kcal
201 kJ	185 kJ

- Los ingevroren fruit, 100% natuurlijk
- Heerlijk zoet van smaak

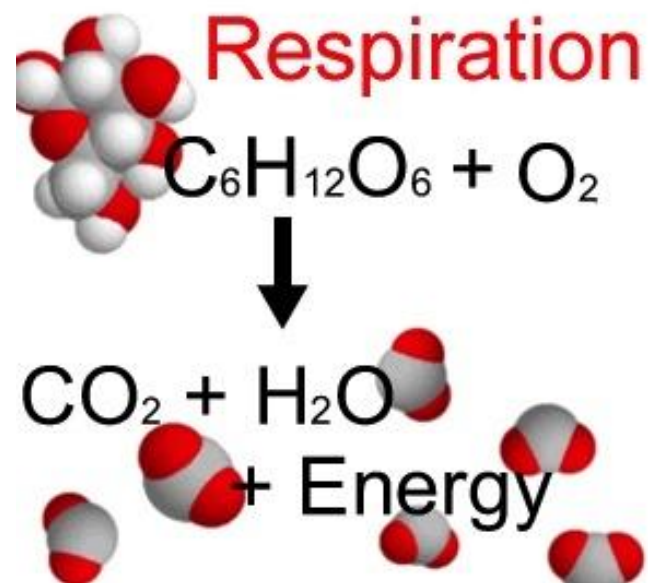
per schepje (25g)	per 100g
56 kcal	43 kcal
231 kJ	185 kJ

Unifreezing IQF Tunnel Freezer



Science of respiration

- Fruit and vegetables need oxygen to stay fresh
- The respiration rate varies by variety and changes through the seasons



Products with PerfoTec



Shelflife Raspberries - 8 Days



UA Collective Promotion & Marketing

- Fruit Logistica 2018 in Berlin, February 7-9
- Biofach 2018 in Nürnberg, February 14-17
- Global Berry Conference 2018 in Rotterdam

Conclusions UA Berry Business

- Get ready for Bright Future
- Get ready for International Presentation: PPP
- Special attention to Organic³
- Fresh & Frozen: Market Entrance Strategies

Thank you for your attention!
Questions?

www.foodtechlink.com

www.grimco.com.ua



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