

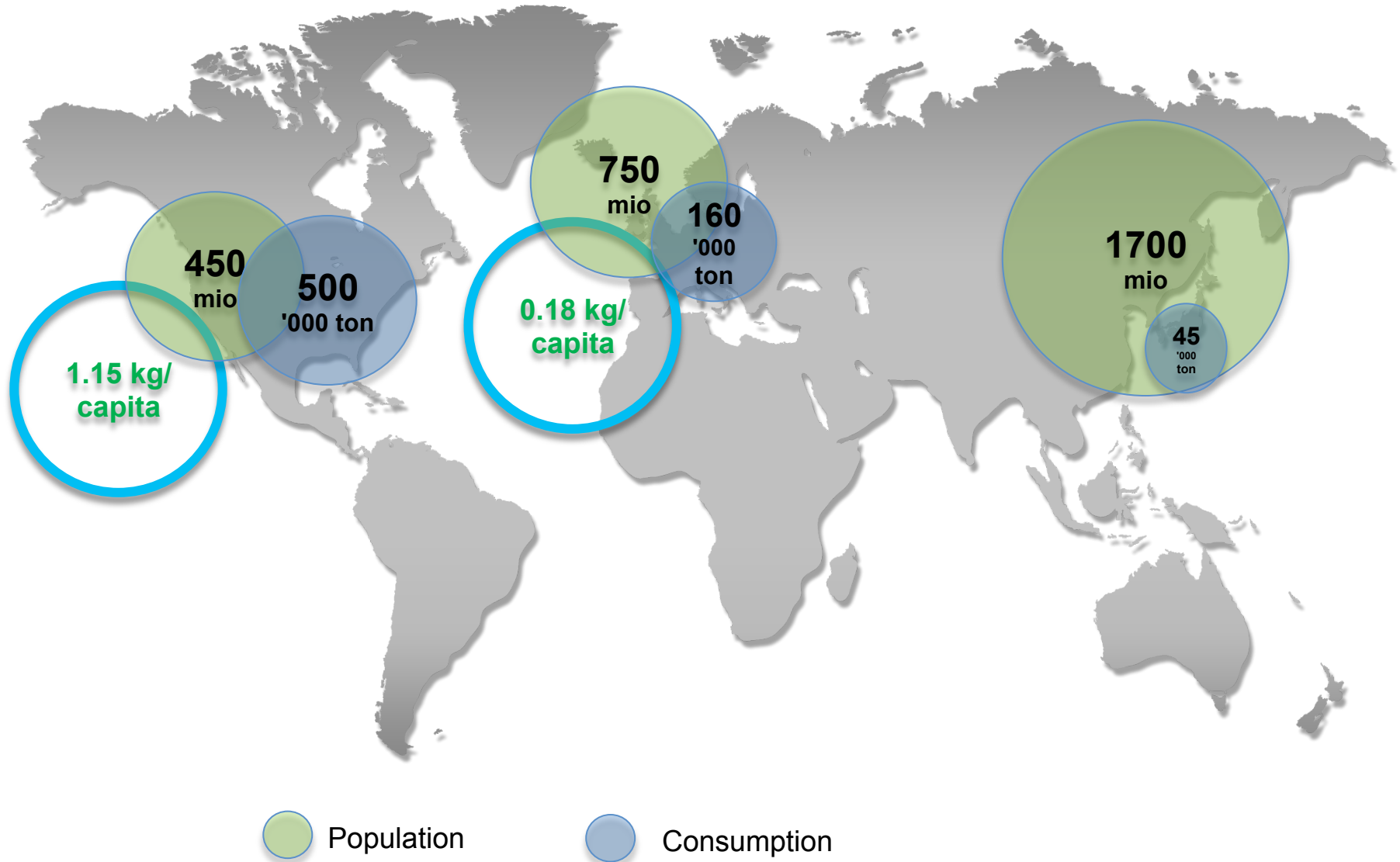


Blue Sky for Blueberries

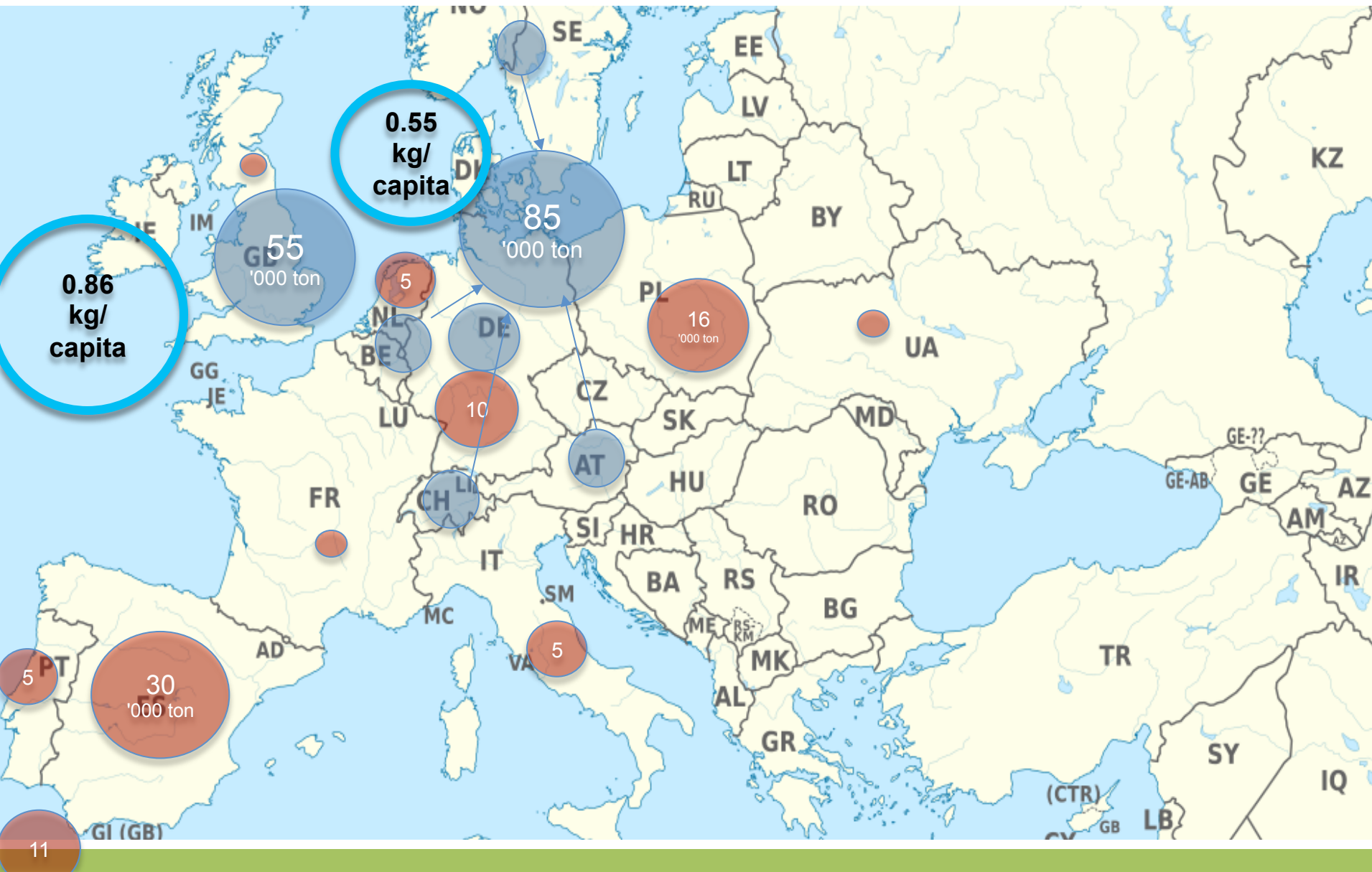
Hans Liekens
Huelva, July 2018



Blueberry Consumption vs Population 2017



Spain is most important European Producer and exporter.



Total European Blueberry consumption 2017: 160.000 ton

So, if...



0,18 kg/capita



0,86 kg/capita

645.000 ton



1,1 kg/capita

825.000 ton

So if we cover the todays need as follow...

Europe & UK Production: 105.000 ton

Africa Production: 20.000 ton

ROW Imports: 35.000 ton

... and we might need 645.000 ton...

...to cover the growth, we need 500.000 ton extra
(and might need more)

@ let's say 25ton/ha (which is ambitious, no?)

= 20.000 Ha extra

... as from when...

At the actual YoY consumption growth rate we need this in **9 years** from now

Penetration & Consumption of Users

US

- Market penetration: **53%**
- Average Per capita consumption of active users: **2.5kg** per person/year

UK

- Market penetration: **<45%**
- Average Per capita consumption of active users: **1.9kg** per person/year

Europe (Estimates):

- Market penetration: **<10%**
- Average Per capita consumption of active users: **1.7kg** per person/year

So lets assume ...

.. the average consumption of users = cst @ 1.7 kg per capita



Penetration <10%



Penetration 45%

575.000 ton

Supply chain basics Fresh produce



Why is penetration in Europe low?

Low consumption.....
....because for some it is a logic Choice...



"I CAN'T BELIEVE THAT MY OWN MOM WANTS ME TO EAT
MORE FRUITS... I MEAN, SNOW WHITE WAS KILLED
BY A SINGLE BITE OF APPLE, RIGHT?"

<https://ourworldindata.org/obesity>

Marketing – Health Benefits - Superfoods



Low consumption....

.....Because Blueberries are expensive?



BONI SELECTION
blauwe bessen
450g

€ 2,04/st

€ 4,53/kg



blauwe bessen
250g

€ 3,33/st

€ 13,32/kg
















blauwe bessen Jumbo
125g

€ 2,59/st

€ 20,72/kg

Low consumption....

.....Because Blueberries are expensive?

 	Chips 	 Mijn lijstjes	 Weekmenu	
Volledig assortiment	Kortingen Rode Prijzen Bio Nieuw Boni Selection Zonder gluten Zonder lactose			
 <p>BONI S. Hand Cooked Chips Rosem... 125g</p> <p><u>€ 1,16/st vanaf 3 st</u></p> <p>€ 1,29/st € 10,32/kg</p>	 <p>LAY'S GRILLS 40g</p> <p><u>€ 0,59/st vanaf 3 st</u></p> <p>€ 0,66/st € 16,50/kg</p>	 <p>CROKY Red Devils snacks paprika 80g</p> <p><u>€ 1,07/st vanaf 3 st</u></p> <p>€ 1,19/st € 14,88/kg</p>	 <p>LAY'S Heinz Tomato Ketchup 45g</p> <p><u>€ 0,50/st vanaf 20 st</u></p> <p>€ 0,56/st € 12,44/kg</p>	
 <p>MARS snacksize 3x35g</p> <p>€ 1,99/st € 7,11/kg</p>	 <p>MARS chocolade mini cubes 242g</p> <p>€ 2,46/st € 10,16/kg</p> <p>Korting -25% vanaf 2 st</p>	 <p>MARS ice cream 12st</p> <p>€ 8,38/st € 16,73/kg</p> <p><u>€ 7,54/st vanaf 3 st</u></p>		

Avg € 13,53/kg

What are the real competitors of Blueberries or fresh cut fruit?



What do you believe drives consumption?

1. Good taste
2. Cheap price
3. Good looking fruit
4. Attractive packaging
5. Presentation in shop

1. Good looking fruit
2. Attractive Packaging & Presentation in shop
3. Good Taste
4. Cheap price



Make fruit as sexy as unhealthy snacks



[THINGS WE MAKE](#) [OUR NEWS](#) [ABOUT US](#) [WHERE TO ENJOY](#) [GET IN TOUCH](#) | [EN](#)



THINGS WE MAKE

FRUIT

VEGGIES

SOUPS

PROFESSIONAL

JUSTFRESH > THINGS WE MAKE > FRUIT



SHOW ALL

BAGS

CUPS

SHAKERS

STICKS



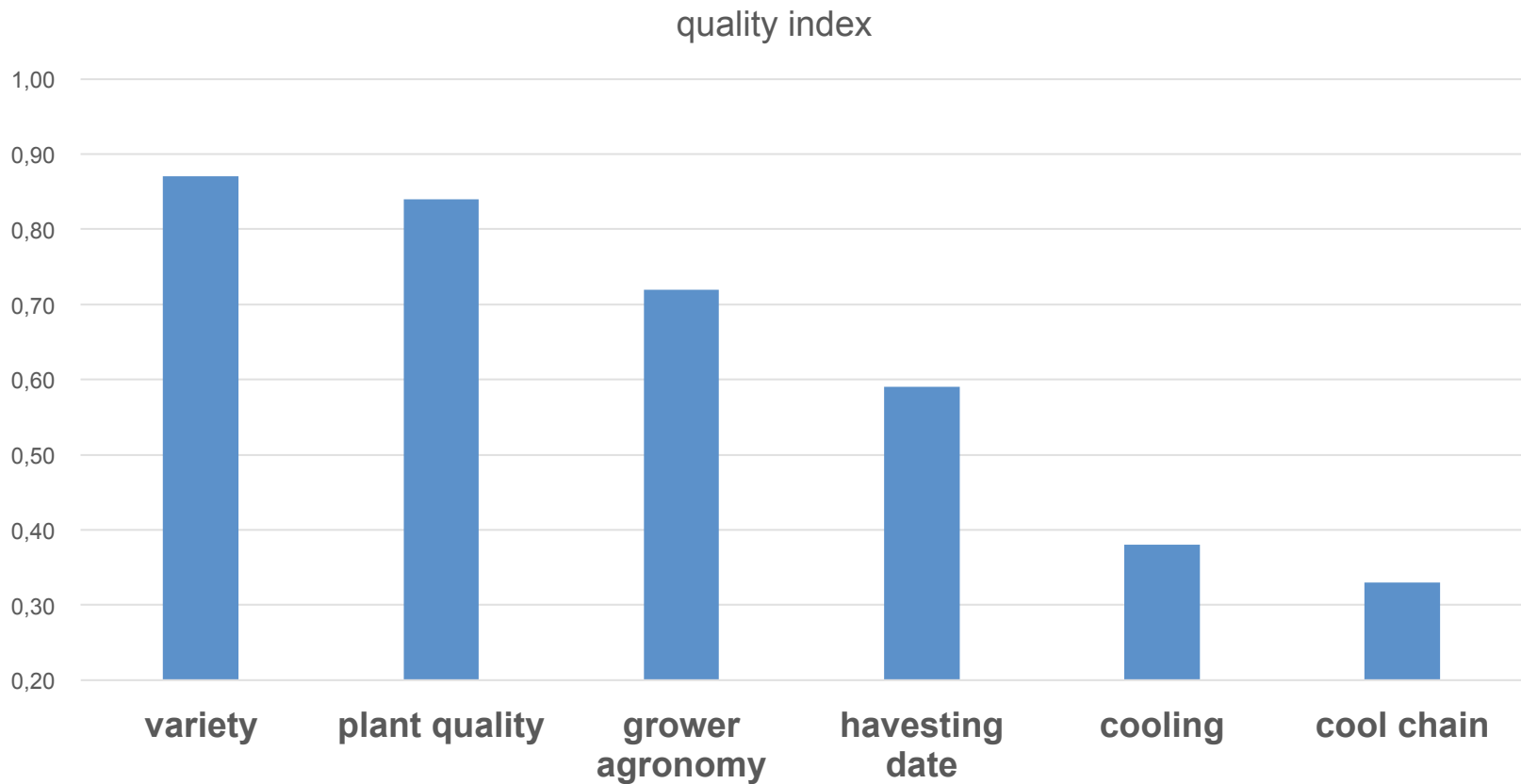


What is the secret of Lays, Twix,....

**100% perfection &
constant quality**

(along the supply chain, from
grower to retail shelf)

Parameters in the quality





Or just,....

Blue  *Note*™

“Tell Your Kids
to Eat Blueberries”

 **FALL CREEK®**

Or just,....