



# 小浆果，大学问

蓝莓、树莓、黑莓供应链经验分享

Small berry, Big knowledge

Experience sharing about the supply chain  
(Blueberry, Raspberry, Blackberry)

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# 01

## 一、 蓝莓、树莓、黑莓 国内供应链现状

The current situation in domestic  
China (Blueberry, Raspberry,  
Blackberry)



## 蓝莓-经历了一个爆发增长后，进入转型期！

Blueberry-after going through a explosive growth, it finally got in a transition period.

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2001年，蓝宝石首次尝试在中国商业化种植蓝莓

In 2001, “Sapphire” first attempt to grow blueberries commercially in China.



2017年国际蓝莓大会在中国的云南曲靖举办

In 2017, International Blueberry Conference was held in Qujing, Yunnan, China.



# 1、体量的增长掩盖不了中国国内在种植、运输领域的落后！

The increasing volume can not cover the backwardness in the field of planting and transportation in China.



辽宁、吉林等产区，以散户大棚、露天果搭配种植为主



## 2、种植品种、技术落后 Planting varieties, outdated technology



直到今天，在云南、贵州、浙江等地，都还有大量农户在种植不适合鲜食的兔眼系列品种的蓝莓  
Until today, there are still a lot growers planting rabbiteye blueberries which is not  
suitable for eating in fresh



### 3、采后冷藏运输储藏技术落后 Outdated technology in Post-harvest refrigerated transport storage



一些地方缺乏冷库及低温加工分选车间，甚至对冷藏运输温度都不清楚！

In some places, there is a shortage of cold storage and low-temperature processing sorting plants, even people do not know about the temperature using Post-harvest refrigerated transport storage.



## 树莓、黑莓-“洋”水果的中国之路

## Chinese road for imported fruit – Raspberry and Blackberry

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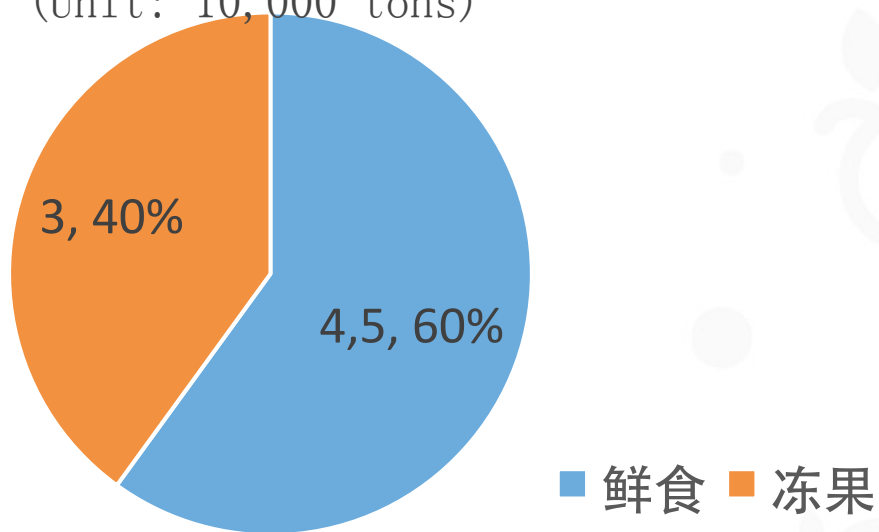
在欧美地区，树莓、黑莓是作为一个日常消费的果品，大家对树莓的认知度远高于中国消费者。  
Raspberry and Blackberry are used as a fruit for everyday consumption in Europe and America, everyone has better and wider awareness of them than in China.

## 口感的差异性，能否满足国人对树莓的诉求

.Differences in taste, whether it can meet Chinese consumer' s demands for raspberry

美国树莓产量（单位：万吨）

Raspberry Production in the United States  
(Unit: 10,000 tons)



美国全年树莓产量超过7.5万吨，且鲜食比例超过60%，且因为饮食习惯的差异，在欧美餐桌上，树莓的接受度更高。In the United States, raspberry production exceeded 75,000 tons, and the proportion of fresh food exceeded 60%. Due to differences in eating habits, raspberries were more accepted on American and European tables.

# 02

## 二、行业痛点

Title

Bottleneck of the industry



# 1、缺乏核心竞争力的品种，盲目选择一些被淘汰的品种

Varieties which lack of core competitiveness.

Choosing some eliminated varieties blindly.



在国内的贵州、云南等地，还有大量农户在推广种植淘汰的兔眼类品种。

In some places like Guizhou and Yunnan Province, Rabbiteye blueberries are planted greatly by a lot of growers.

**2、过于追逐快速投资回报，没有深耕农业的精神**

Excessively pursuing of rapid returns on investment,  
not deepening the spirit of agriculture.

**3、消费市场还不成熟，陷入价格战循环**

Consumer market is still immature,  
trap in a cycle of Price war.

# 03

## 三、 未来方向

Title

Future direction



1、终端与种植端互相渗透，以采促销，以销反哺采。

Combine with the sales end and growing end,  
purchase to promote sales, and sales to guide purchase contrarily.

2、品类品牌化，用品牌养成消费者的消费习惯。

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Fruit category branding, using the brand to  
develop consumer buying habits

3、渠道为王，通过好的渠道，将品类品牌真正打响。

Selling channel is the most important thing.

Through a good channel, fruit category branding  
can be maken a difference.

# 04

## 四、 百果园小浆果类现状

Title

The current situation for Small  
berry in Pagoda

| 销售额占比<br>Sales ratio                            | 2014年 | 2015年 | 2016年 | 2017年 |
|---|-------|-------|-------|-------|
| 树莓类（含黑莓）<br>Raspberry (including<br>blackberry) | 0.01% | 0.10% | 0.23% | 0.22% |
| 蓝莓类<br>Blueberry                                | 0.62% | 0.79% | 1.34% | 1.42% |
| 小浆果合计<br>Berry in total                         | 0.63% | 0.89% | 1.57% | 1.64% |



# 05

## 五、 百果园小浆果投资规划

Title

The investment program for  
Small berry in Pagoda

百果园也在积极打造自有的小浆果供应链

Pagoda also are actively building our own berry supply chain.

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A top-down view of various fruit slices and two small metal forks arranged on a white background. The fruit includes several orange slices, two tomato slices, and one kiwi slice. The forks are positioned diagonally. The text 'Thank you!' is printed in a large, bold, black font on the right side of the image.

**Thank you!**