



**FRUIT
LOGISTICA**

POLAND

SOFT FRUIT MARKET



EWABIS®
ESTABLISHED IN 1987

AGNIESZKA WRYK

23TH JUNE 2022



Agenda

- Poland
- Ewa-Bis presentation
- Political situation in Central Europe
- Global production of soft fruits
- Polish market
- Polish consumption of soft fruits
- Customer preferences and awareness
- Soft fruit seasonality in Poland
- Packings
- Retailers
- Service provision

Poland

Poland

- is a country in Central Europe
- has a population of over 38 million
- is the fifth-most populous member state of the European Union
- is a developed market
- it has the sixth largest economy in the European Union



Ewa-Bis F&V sales



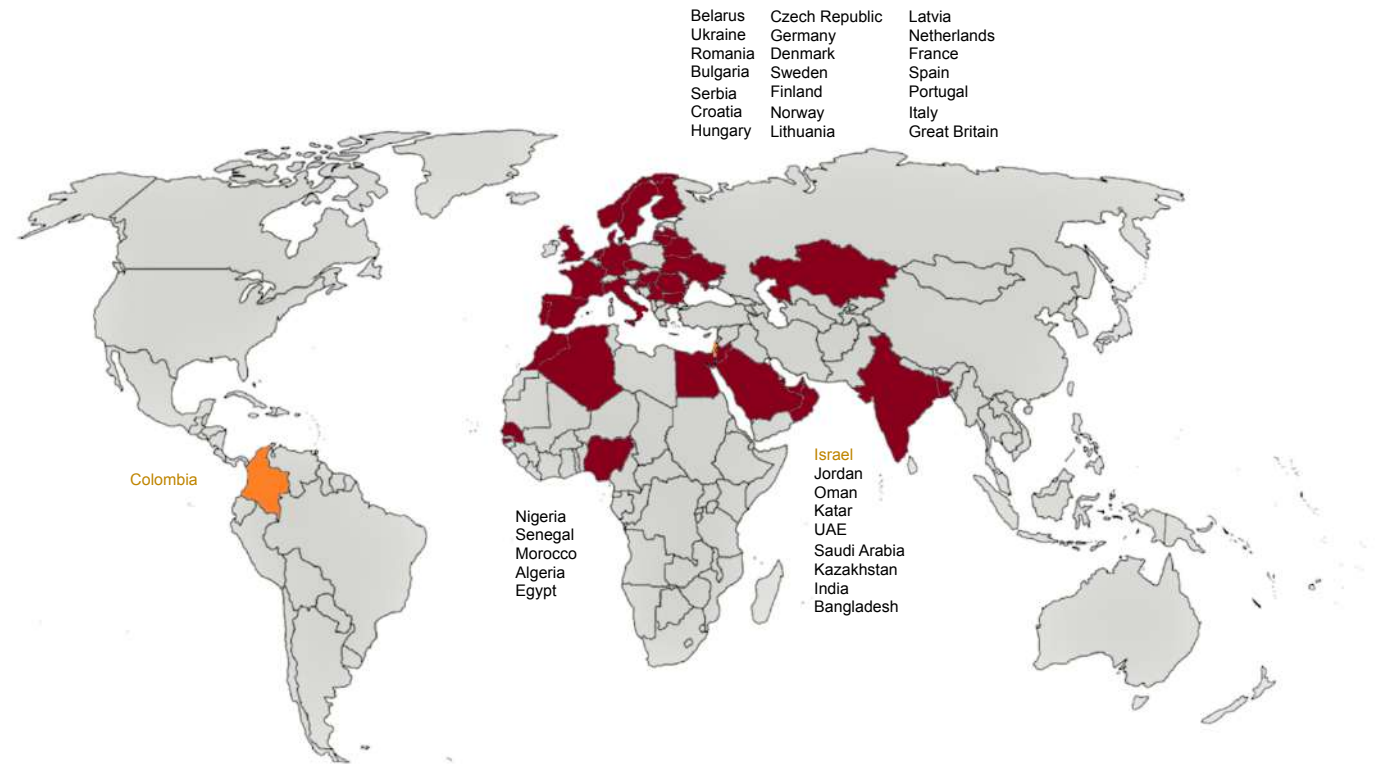
The company is one of the 5th largest exporters in Poland and cooperates with approx. 60 producer groups and approx. 140 individual farmers.

Apples - annually we export **70 000 t** apples to 35 countries around the world

Tomatoes – annual export is 1035 t to European countries

Blueberries – annual export is 500 t to European and Asian countries

Ewa-Bis Group turnover for 2021 is 100 M USD





Ewa-Bis experience

We work with producers who meet the appropriate quality standards.
We require GG, GRASP, BRC Food, IFS Food and Eco
Ewa-Bis Sp. z o.o. is IFS Broker and Eco certified
We support suppliers in their development.
We develop an assortment of ecological products
We serve retailers in house and abroad



THE RUSSIA-UKRAINE WAR AND FRUIT INDUSTRY

Impact on sale to Russia and
Ukraine

Logistic issue

- Reduced availability
- Shipping delays
- Quality damage

Price increase

Reduced production

- Financial risk
 - Swift payments,
 - Clearing of payments
- Labour
 - Reduction
- Production cost
 - Energy
 - Minimum wages
 - Fuel

- Retailers impact



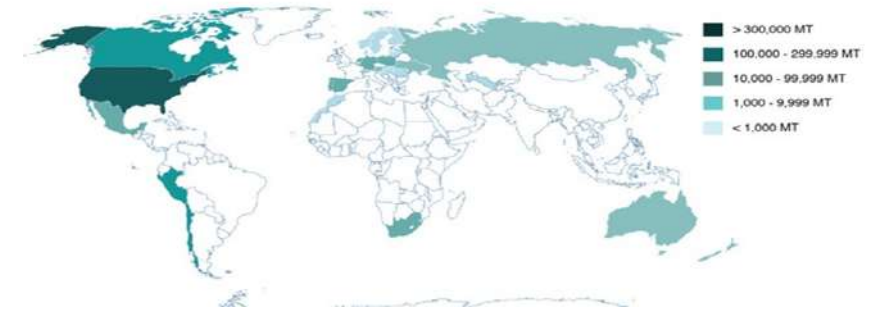
Messe Berlin

Blueberries Around the Globe

United States, Canada, Europe, Asia, and Southern Hemisphere

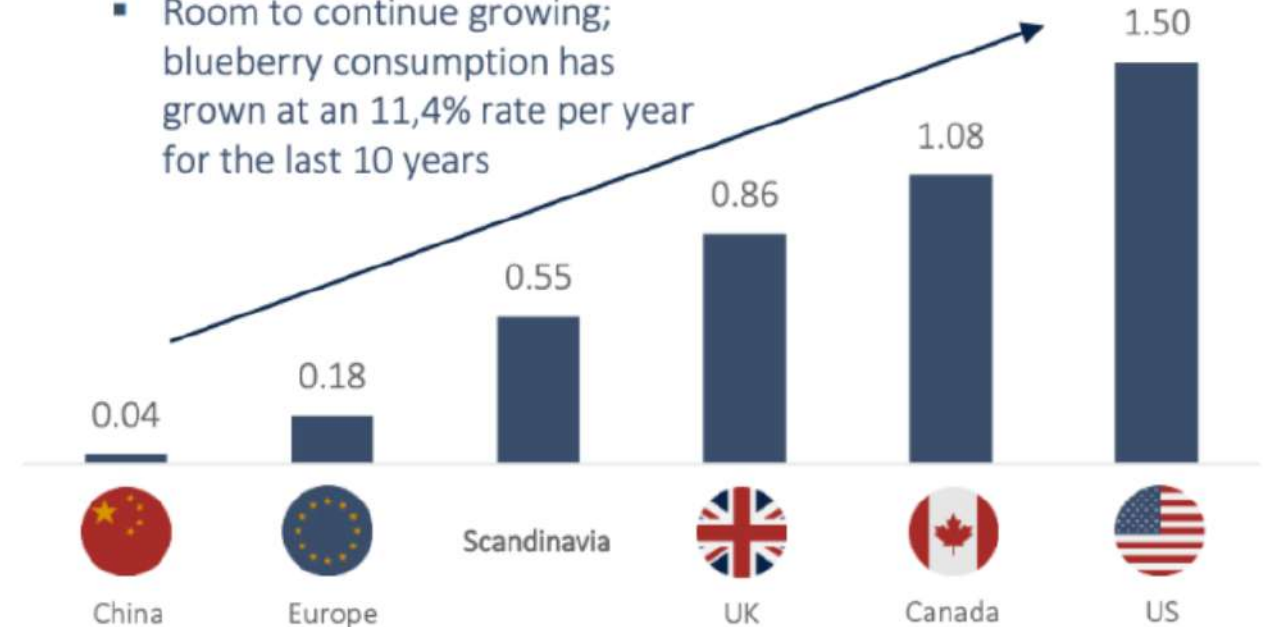
Rank	Rank	Production (metric tons)	Cultivated land
1	United States of America	269,257	37,555
2	Canada	178,745	54,535
3	Mexico	29,067	2,946
4	Poland	14,721	5,039
5	Germany	10,710	2,714
6	France	9,352	2,483
7	The Netherlands	7,919	775
8	Portugal	6,572	-
9	Spain	6,412	-
10	Australia	3,470	913

2019 Global Blueberry Production
(Metric Tons)



Total Blueberry Consumption per Capita *In Kg*

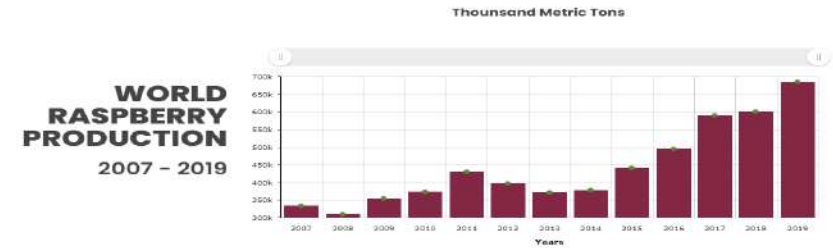
- Room to continue growing; blueberry consumption has grown at an 11,4% rate per year for the last 10 years



Source: Carsol

||||| Messe Berlin

Raspberries Around the Globe



In 2020, world production of raspberries was 895,771 tonnes, led by Russia with 20% of the world total (table). Other major producers were Mexico, Poland, Serbia and the United States

World Raspberry Production by Country

	Country	Production (Tons)	Production per Person (Kg)
	Russian Federation	174,000	1.185
	Mexico	128,848	1.033
	Serbia	120,058	17.148
	United States of America	102,510	0.313
	Poland	75,660	1.969
	Spain	59,990	1.286
	Ukraine	35,540	0.841
	Bosnia and Herzegovina	19,749	5.219
	Portugal	17,880	1.737
	Chile	15,942	0.907
	United Kingdom	15,073	0.228

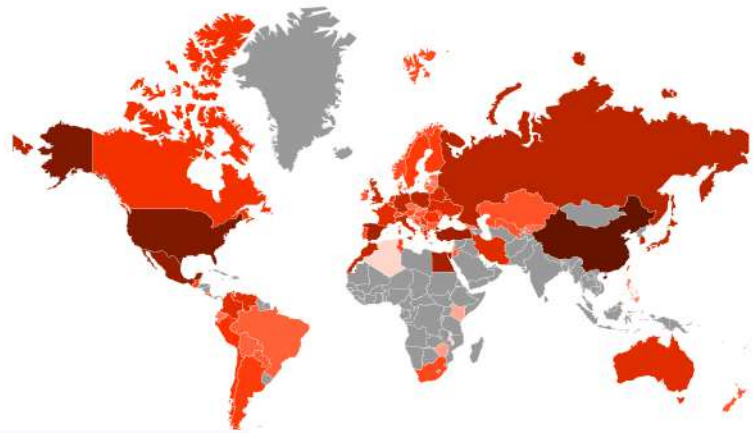
Raspberry production – 2020

Country	Production (thousands of tonnes)
Russia	182
Mexico	146
Poland	122
Serbia	119
United States	101
World	896

Source: FAOSTAT of the United Nations^[1]

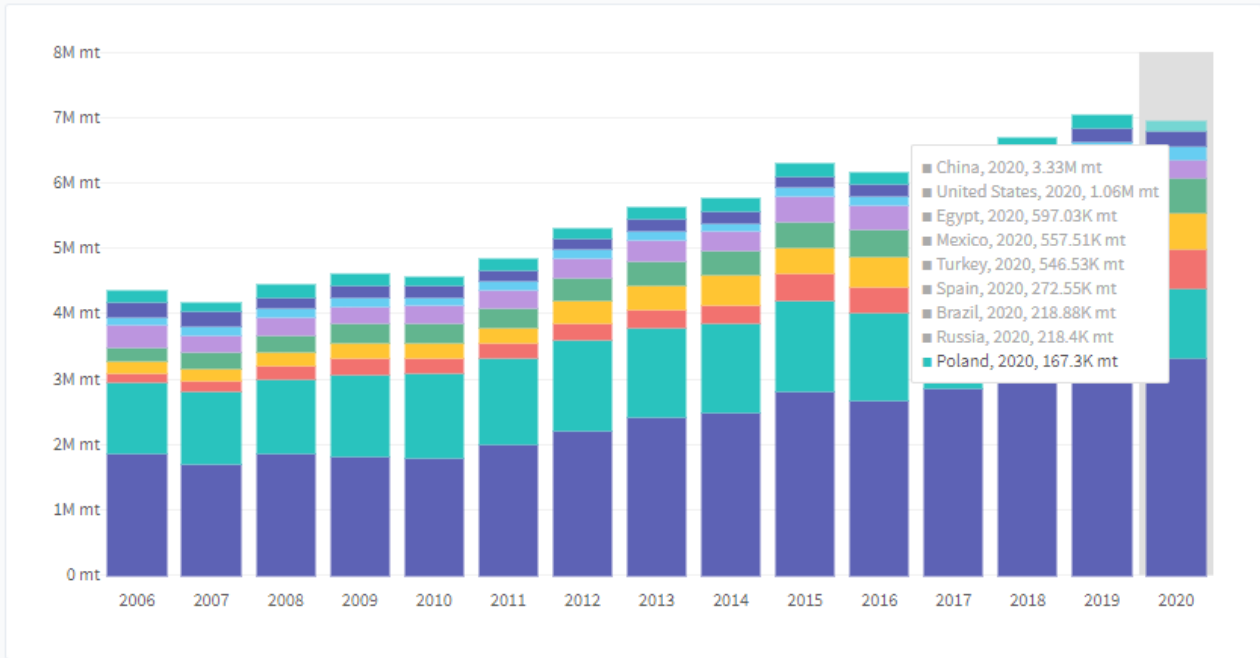
Russian Federation, Mexico and Serbia produce together more than 50 % of world's total raspberry globally.

Strawberries Around the Globe



Production Trends of Top 10 Producers of Fresh Strawberry

This is the production trends of the top 10 producers of Fresh Strawberry from 2006 to 2020.



Rank	Country	Country 2020	Production Quantity 2020
1	China	≈ 37.56%	3.33M
2	United States	≈ 11.92%	1.06M
3	Egypt	≈ 6.74%	597.03K
4	Mexico	≈ 6.29%	557.51K
5	Turkey	≈ 6.17%	546.53K
6	Spain	≈ 3.08%	272.55K
7	Brazil	≈ 2.47%	218.88K
8	Russia	≈ 2.47%	218.40K
9	Poland	≈ 1.89%	167.30K
10	Morocco	≈ 1.88%	166.96K

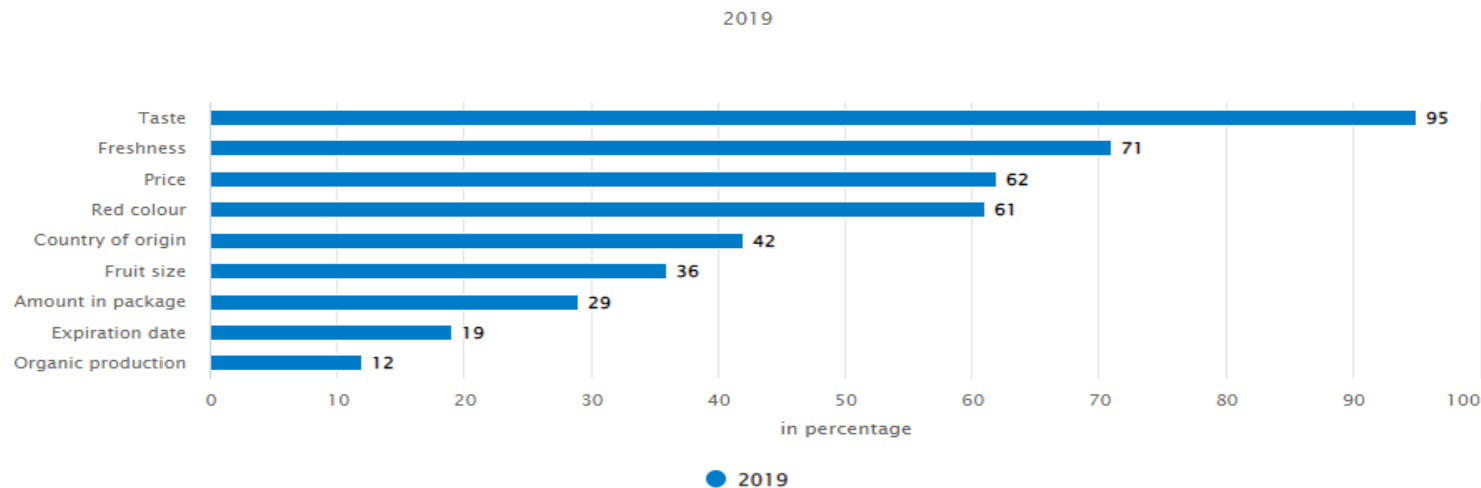
Source: Tridge

Customer expectations

- Strawberries are one of the most popular summer fruits in Europe
- According to a consumer report by Roamler, 93% of Europeans consume strawberries
- Strawberries are heavily promoted during the local season, but some consumers are prepared to pay a premium for high-quality, tasty strawberries during the off-season



Figure 5: What do European consumers look for when purchasing strawberries?



Source: Roamler Consumer report strawberry season, 2019

WZROST LICZBY KONSUMENTÓW

4/2022 VS. 4/2021

1



67%

2



50%

3



26%

4



15%

5



12%

Kantar, KZGPOIW, INSPIRE, FPOIW

- COVID influence
 - Healthy
- Availability
- Packaging
 - Closed punnet
 - Heat seal importance
- Price
- Taste

Soft fruit consumption in Poland 2021/2022

General fruit consumption in Poland

Average annual fruit and preserves consumption per household (kg/person)

- Economic impact
 - Richest household (20%)
85% higher fruits eating than the poorest household (20%)
– 63 kg/person
 - Soft fruit 117,9% higher
 - 7,3kg/persons vs 3,4 kg/person

Tabela 19

Przeciętne roczne spożycie owoców i przetworów
w gospodarstwach domowych ogółem (w kg na 1 osobę)

Wyszczególnienie	2015	2016	2017	2018	2019	2020	I-III 2020	I-III 2021
Owoce i przetwory	43,08	43,92	43,68	45,00	45,24	46,32	11,34	12,18
Owoce świeże i chłodzone	41,28	41,88	41,64	42,72	42,84	43,44	10,68	11,28
jabłka	13,20	12,96	12,00	11,64	12,12	11,28	3,72	3,48
owoce jagodowe	5,64	5,16	4,92	5,04	4,80	5,04	0,45	0,50
owoce pestkowe	4,44	4,44	3,96	5,16	4,68	3,60	0,18	0,18
owoce cytrusowe	7,80	8,16	8,04	8,04	8,52	8,76	3,09	3,72
banany	6,12	6,84	7,92	7,80	7,80	9,36	2,43	2,43
pozostałe owoce	3,84	4,32	4,80	5,04	5,16	5,40	0,81	0,96
Owoce suszone i orzechy	1,20	1,20	1,20	1,32	1,32	1,44	0,33	0,45
Owoce mrożone	0,12	0,12	0,12	0,12	0,12	0,24	0,06	0,09
Przetwory owocowe	0,60	0,72	0,72	0,84	0,96	1,20	0,27	0,36
Soki owocowe (I)	9,60	9,50	9,72	9,96	10,56	11,40	2,73	2,97

Źródło: obliczenia własne na podstawie danych GUS.

Average family spends 7,5% expenses for fruits

Soft fruit seasonality

Production
May - September

Import of fresh products:
October – May



Okres dojrzewania	Odmiana	Lipiec				Sierpień				Wrzesień			
		1 tyg.	2 tyg.	3 tyg.	4 tyg.	1 tyg.	2 tyg.	3 tyg.	4 tyg.	1 tyg.	2 tyg.	3 tyg.	4 tyg.
Odmiany Wczesne	Chanticleer												
	Earlblue												
	Bluetta												
	Sunrise												
	Hannah's Choice												
	Duke												
Odmiany o średnim okresie dojrzewania	Huron												
	Spartan												
	Patriot												
	Meador												
	Bluejay												
	Berkeley												
	Toro												
	Draper												
	Bluecrop												
	Bonifacy												
	Elizabeth												
	Bonus												
Odmiany późne	Goldtraube												
	Herbert												
	Chandler												
	Bluegold												
	Rubel												
	Brigitte												
	Ozarkblue												
	Nelson												
Odmiany późne	Denise												
	Legacy												
	Darrow												
	Liberty												
	Lateblue												
	Elliott												
	Pink Lemonade												
	Aurora												



Customer awareness

Sustainable development

- environmental protection
- Reduction of chemical plant protection
- Reduction of energy and water consumption

Social responsibility

- Minimum wages
- Abuse prevention
- Equality

Quality

- Quality assurance systems
 - Global Gap
 - IFS, BRC

Foot print

- environmental





Retailers

Biedronka – 3150 stores

Lidl – 810 stores

Netto - 600 stores

Auchan – 113 stores (multiformats)

C4 – 900 stores (multiformats)

Dino – 1815 stores

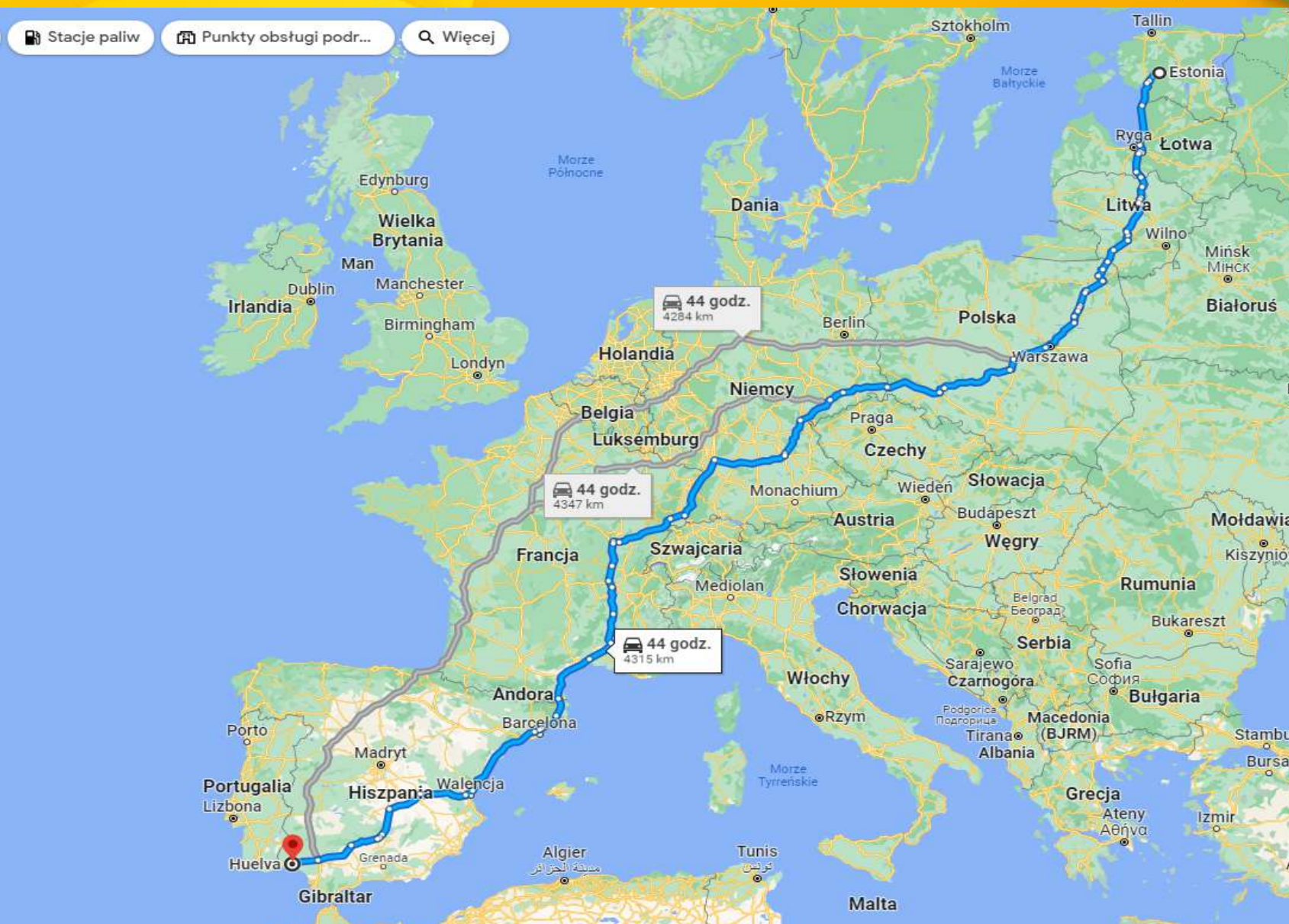
Retailers

Availability - 12 months

Packaging

- not standard weight
– 300g 700g
- EAN codes
- Plastic reduction
- Quality standards audits
- Laboratory tests
 - MRLs
- Quality
 - Varieties, Brix, durability





Service provision

Polish experience

Huelva – Estonia – app 4400 km

Warsaw – Estonia – 1000 km

Quality checks

Distribution



¡Gracias!

Agnieszka Wryk
23th June 2022

