9th INTERNATIONAL TABLE GRAPE SYMPOSIUM

CHILE

FEBRUARY / 2020

South African Table Grape versus the rest of the World or with the rest of the World

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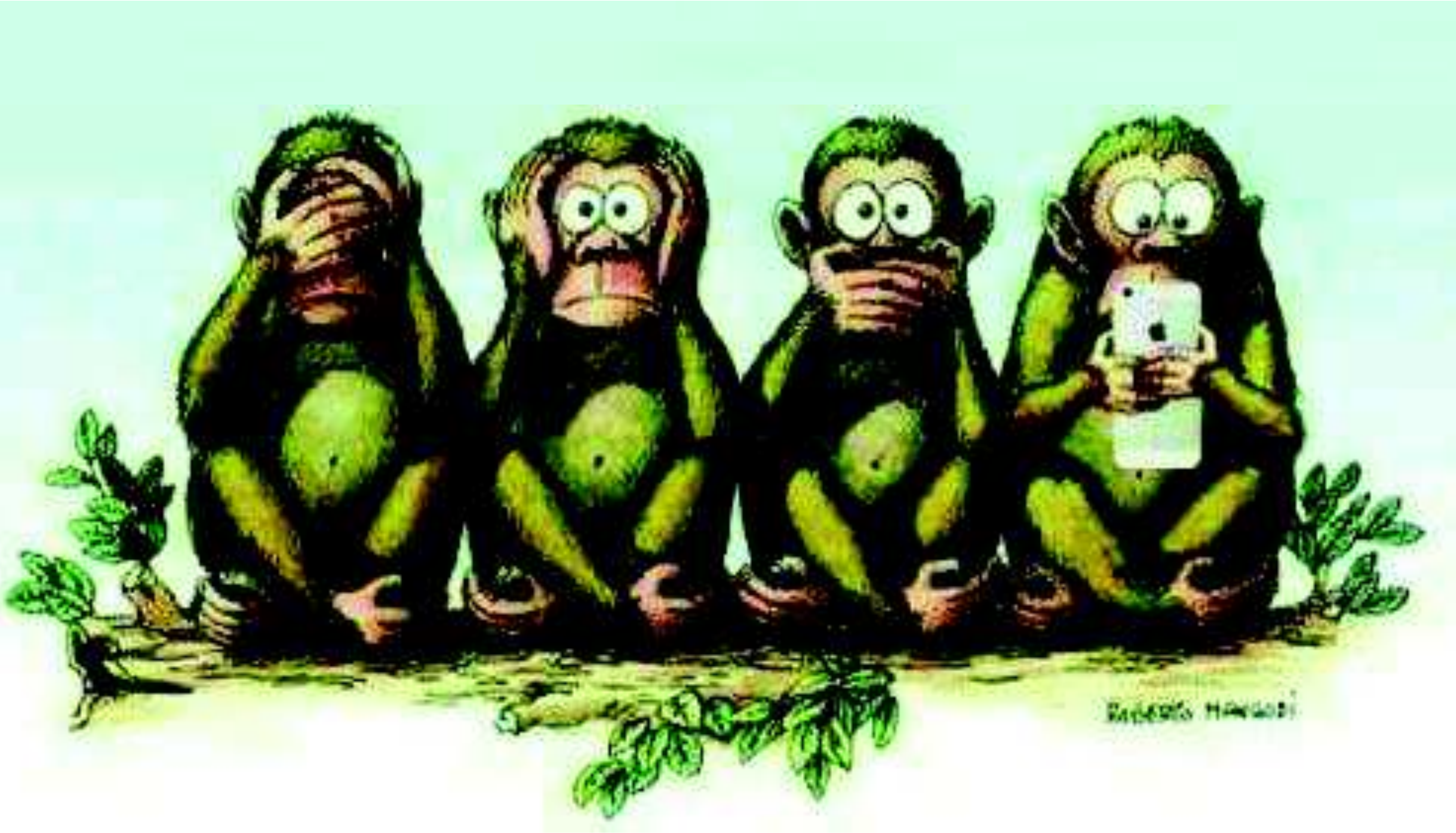
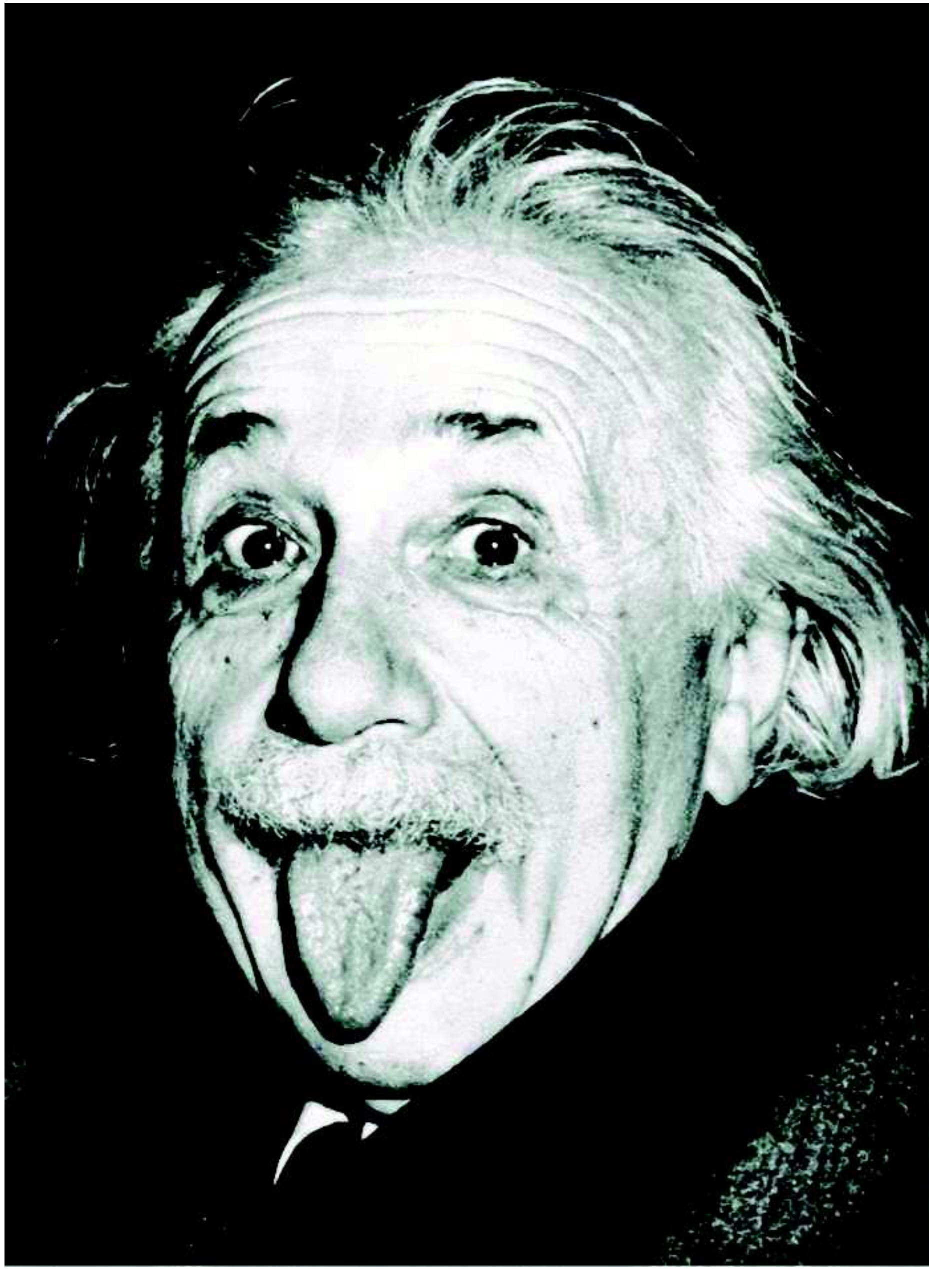


Human brain is like a parachute if
is not open is not useful



Disclaimer

- The following presentation are not necessary representing San Lucar view and opinion.
- Is not my intention to offence any one, my apologies then in advance if any one feel so, however if you get uneasy and believe the you need a change, then mission accomplish.
- I am not holding the truth, but I am sure that I am not far off of “reality”

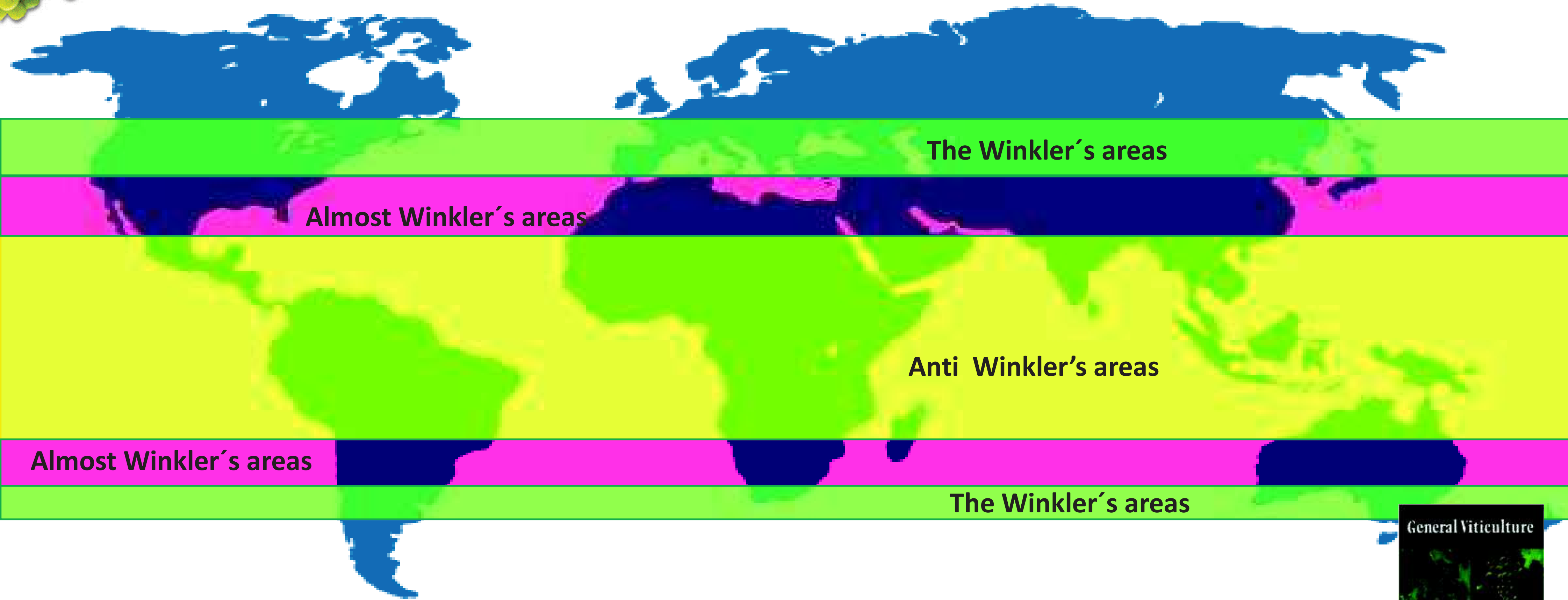
World Scenario

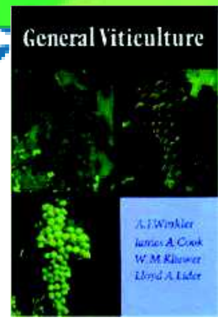
- The development of the tropical and subtropical production techniques, by Indians in mid late 60´s and improve by Brazilians by the late 90´s, where the foundation of a new world production revolution in term of expansion, which take place in the late 90´s early 2000´s.

- The development of the Bio-Technology call “Embryo rescue”, by Dr. Ramming in 1990, was the foundation of the world new varieties revolution in term of new breeding frontiers.
- Genetic identification of genes associate to a desirable characteristics, shortened the development of varies in term of time span.

Genome editing, the unknown new revolution, CRISPR-Cas9 Enzyme

Development of new Table Grape Production zones

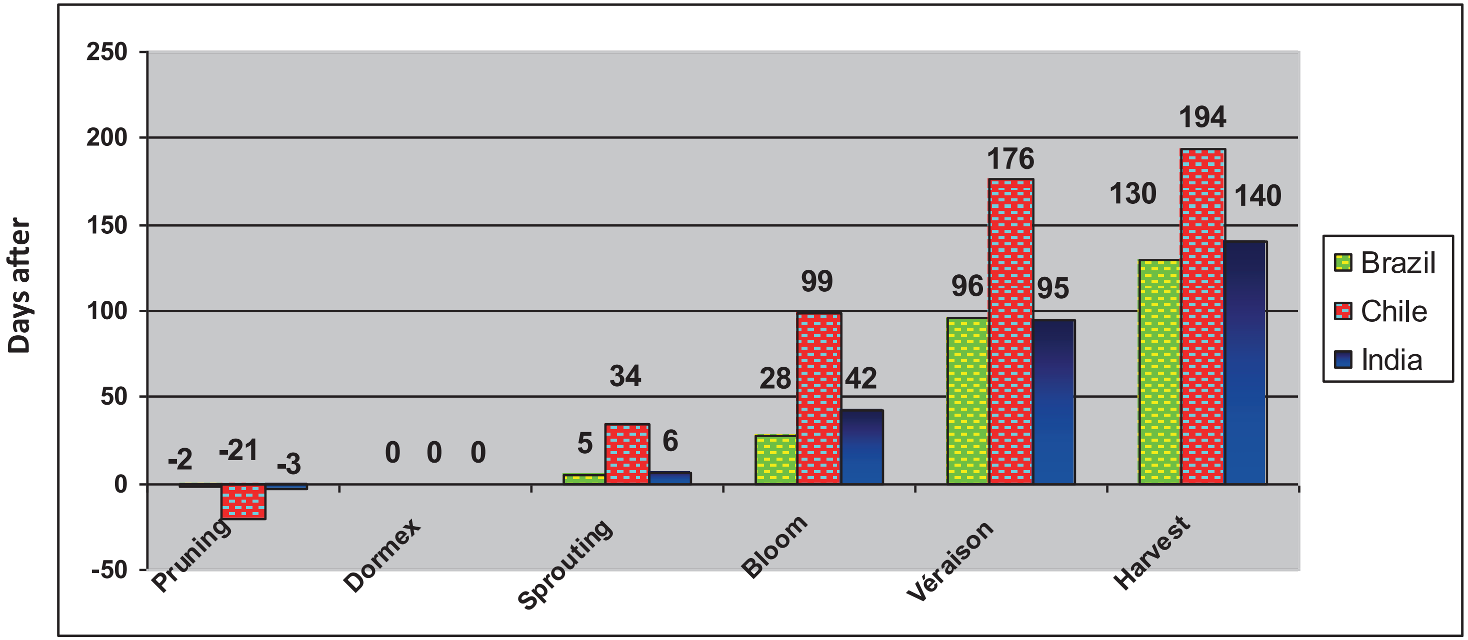




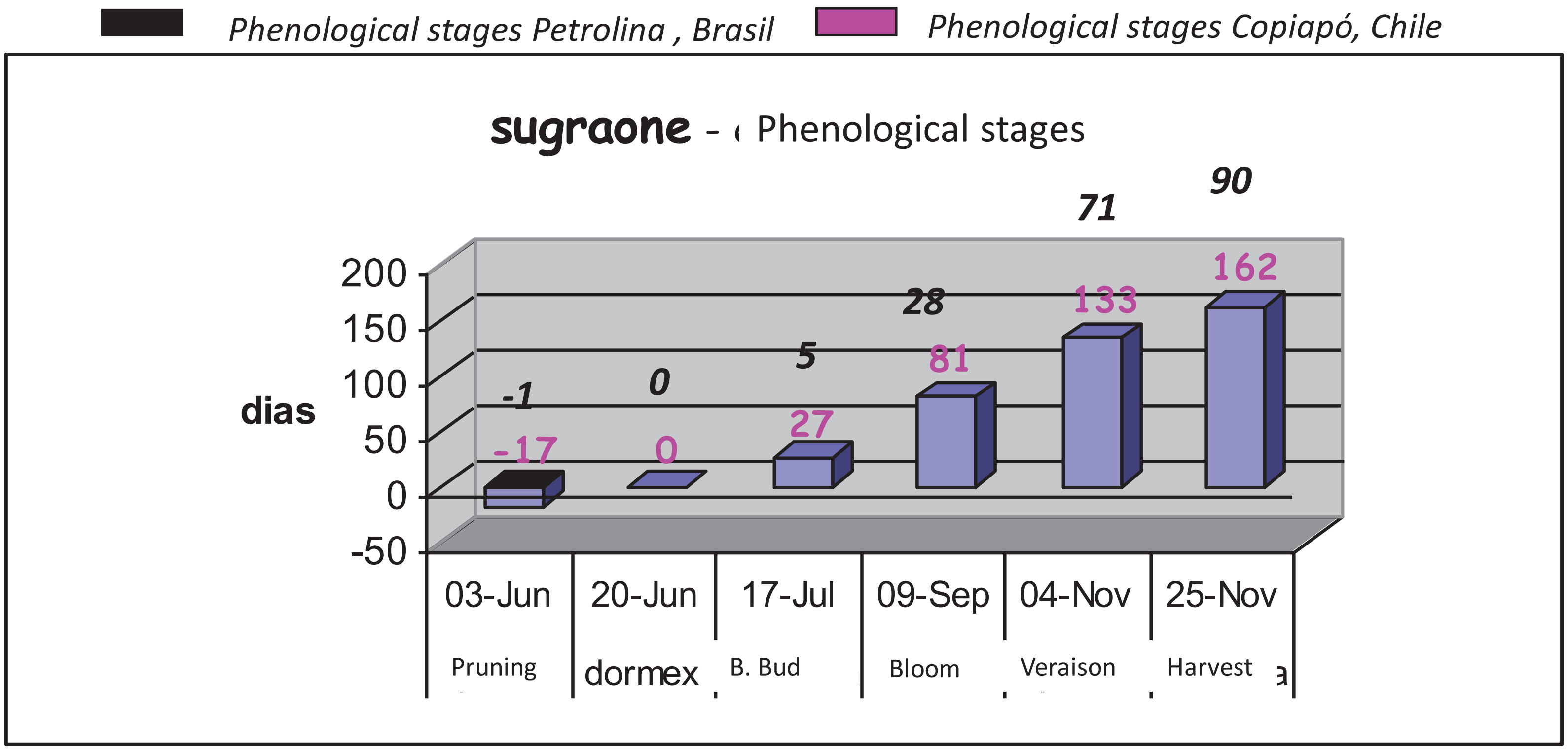
General Viticulture
A. J. Winkler (Author), James A. Cook (Author),William Mark Kliewer (Author), Lloyd A. Lider (Author),Laura Cerruti (Editor)

Fuente: adaptado de J. Pandol 2014 Apeco/ Copiapó

Phenological Stages and comparative production cycle Thompson Seedless

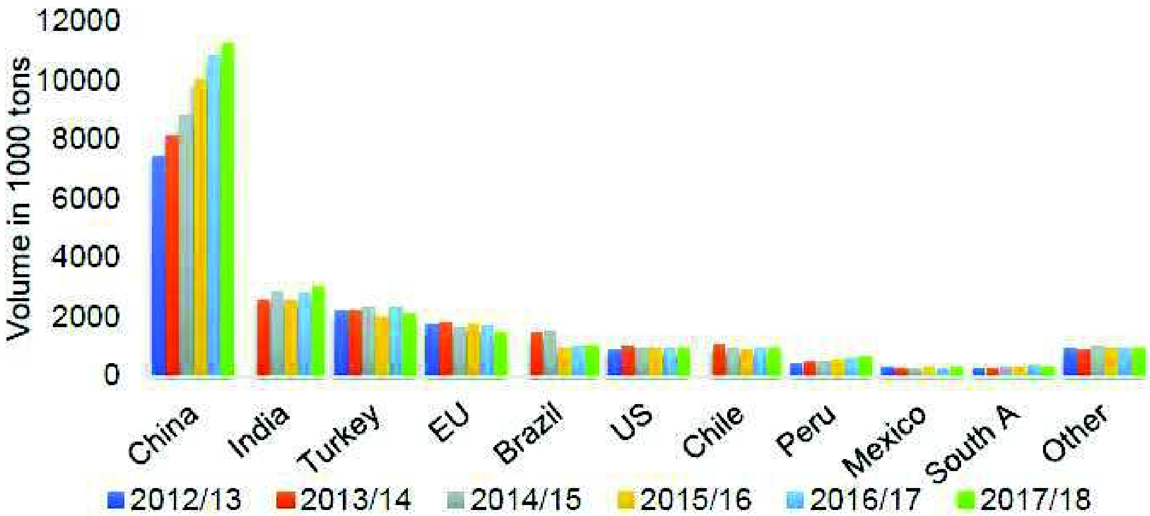


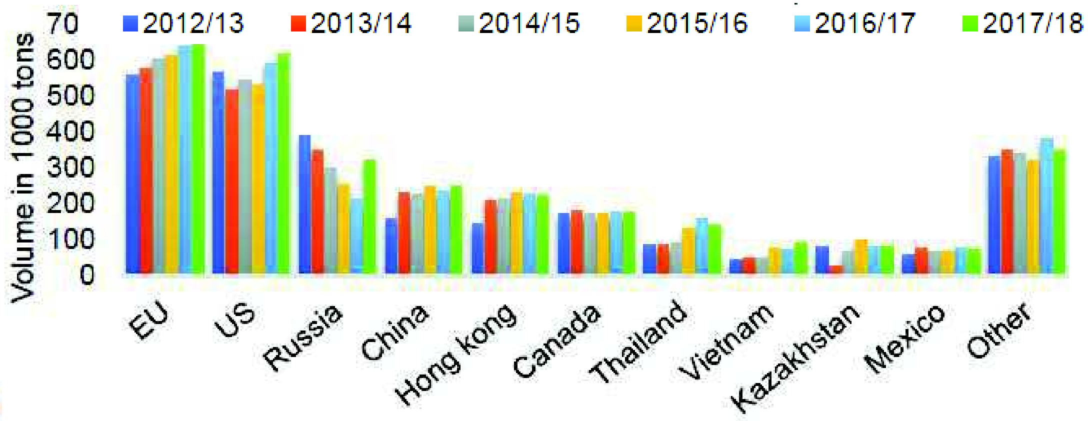
Fuente: V. Giancaspero, O. Salgado 2008 - 2009



- ***Each Table Grape production area have their key management, dosages, timings and different objectives***

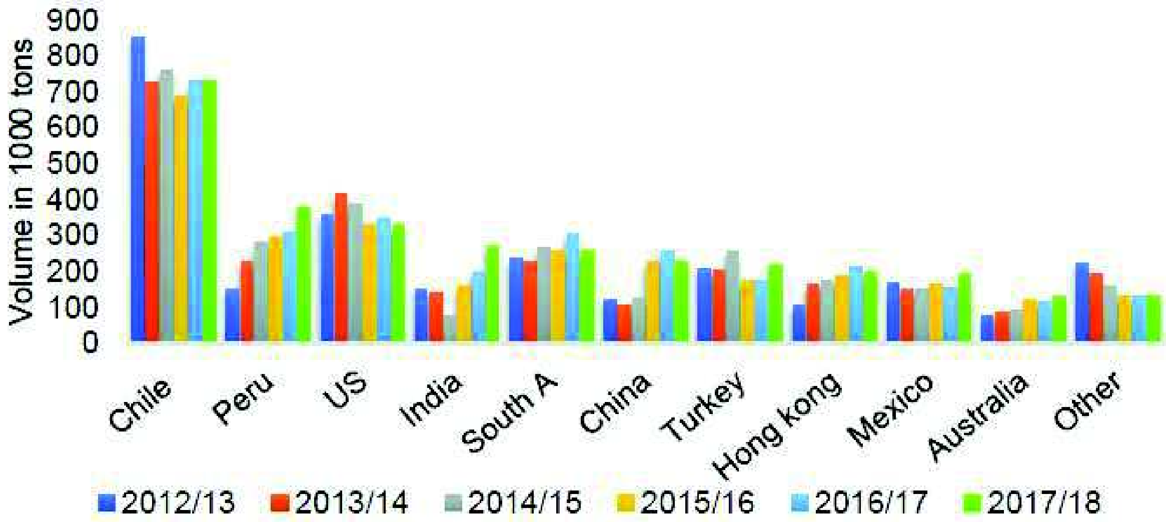
Source : V. Giancaspero, 2008 - 2009





World leading Importers

World leading Producers / Exporters



Source: USDA 2017/18

Who will be the winner:

Volume?

Quality – condition ?

Offer of variety pool ?

Market position ?

Highly productive and efficient farms , cost……..else?

Professional Agriculture management: technical, quality production and business oriented, market driven…………?

Information on time and with quality…………….decision making process?

Source: Adapted from A. Hoffmann 2015


I do not want to change !!!

Chilean and Peruvian transit time to the major Market region

Should be consider 7 to 10 days between harvest and departure plus 10 – 15 days of selling and 4 – 5 days in the shelve, so add 22 – 25 days above the TT to have the Post harvest commercial life

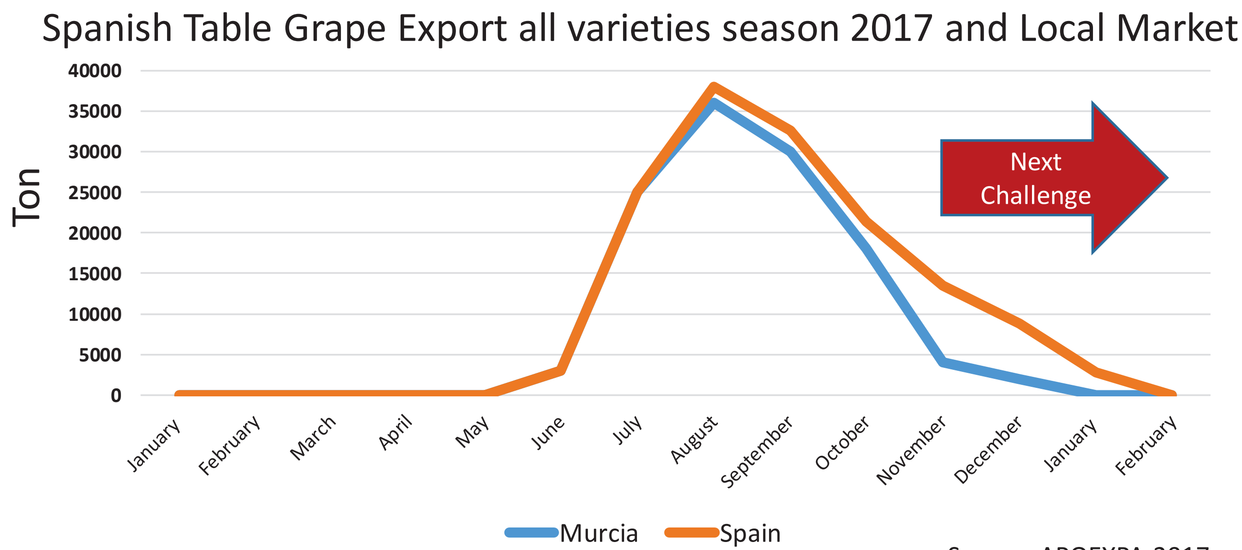
Nota: **+** additional time above the agreed ETA / TT

Source: O. Salgado 2011 collected from a number of shipping line operating in Chile

Market competition

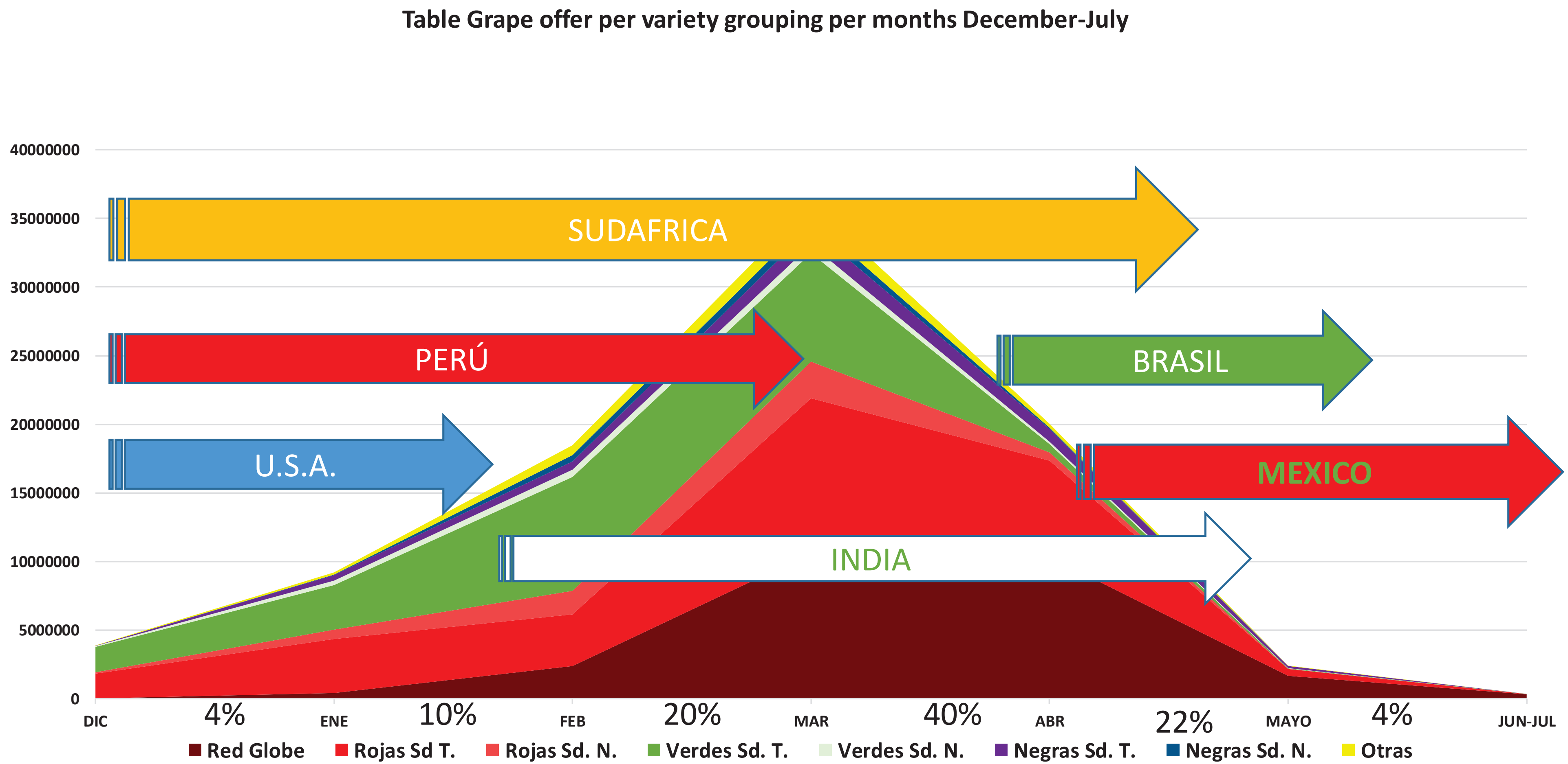
EU Grape

- The Spanish industry, basically Murcia (leading the process) are facing a major transformation in term of Varieties and packing formats, the growers are large, reducing the fragmentation of the industry. They have their own (Murcia) breeding program.
- Italy in a more slow motion, are also making a big transformation, but mainly driven by few players.
- Strong movement towards the "Eat Local"
- This will reshape the counter season consumption and will leave as second purchase decision, towards the import, if local is present.



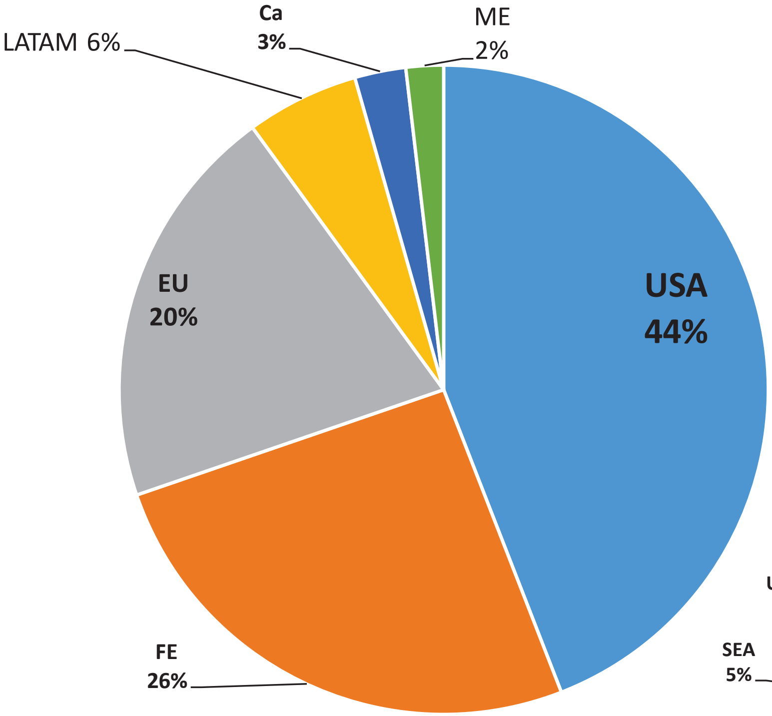
Source: APOEXPA 2017

Table grape offer from key table grape suppliers

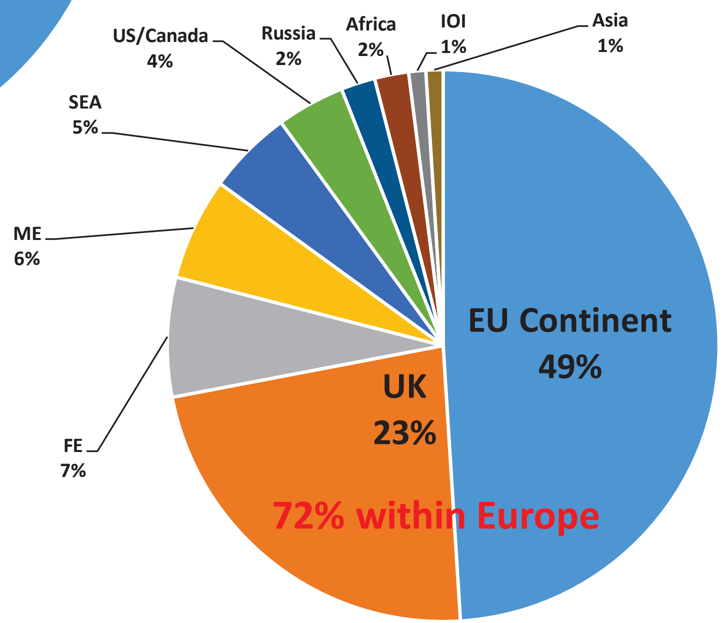


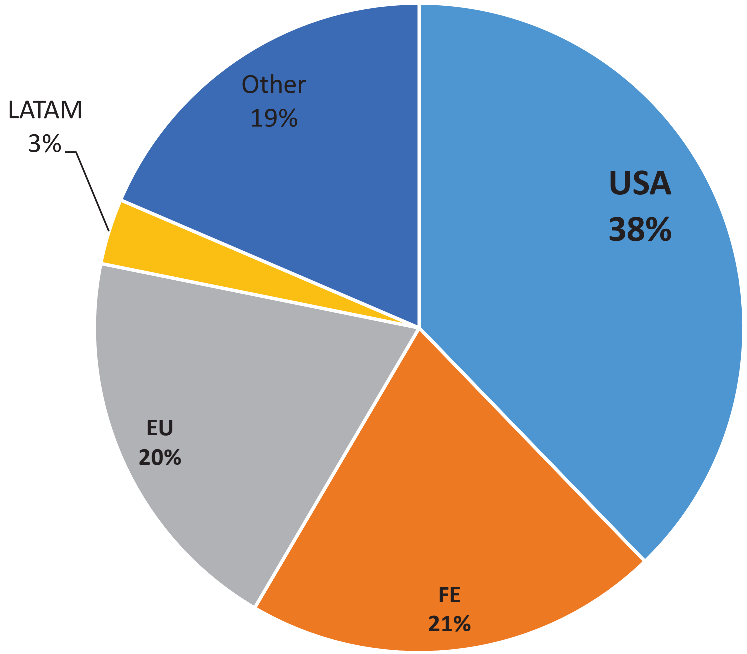
Fuente: ASOEX 2018 y Dragomir Ljubetic

Source: Adapted from C.Corssen. Frutera Santa María S.A. 2018



Chile represent 54% of the USA importation ,
Mexico 29% and Peru 16%





Source: PROVID (Informe de Campaña 2017-2018) y ASOEX 2018

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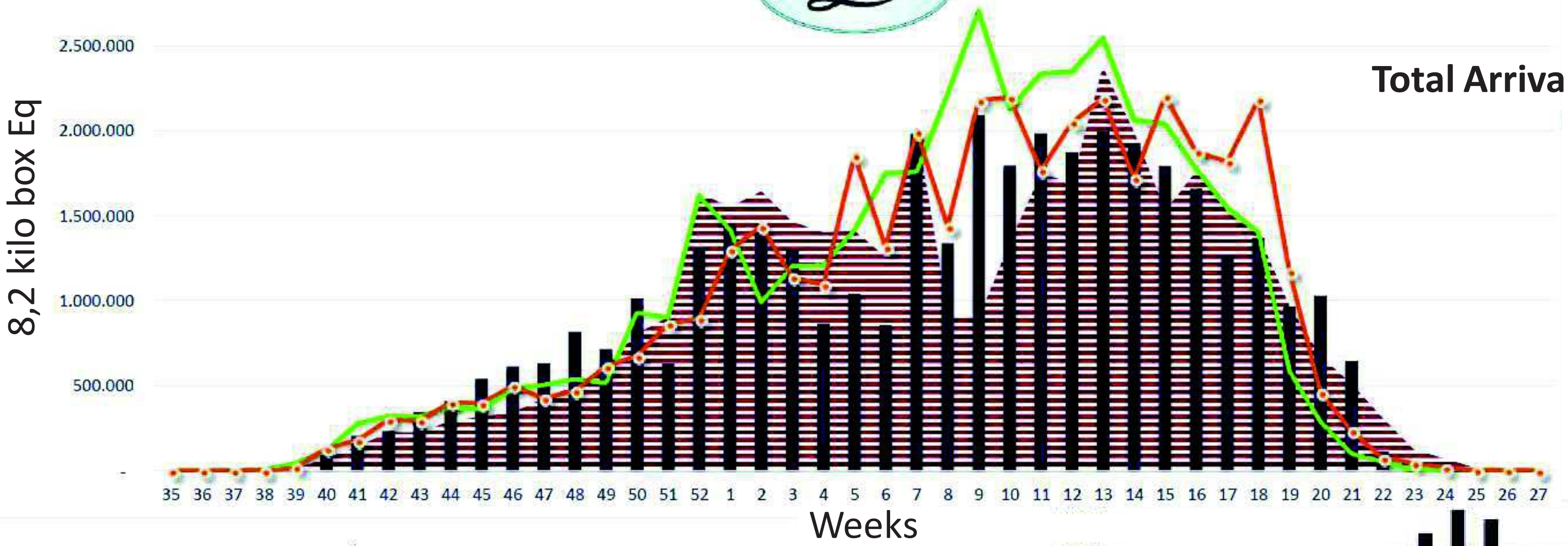
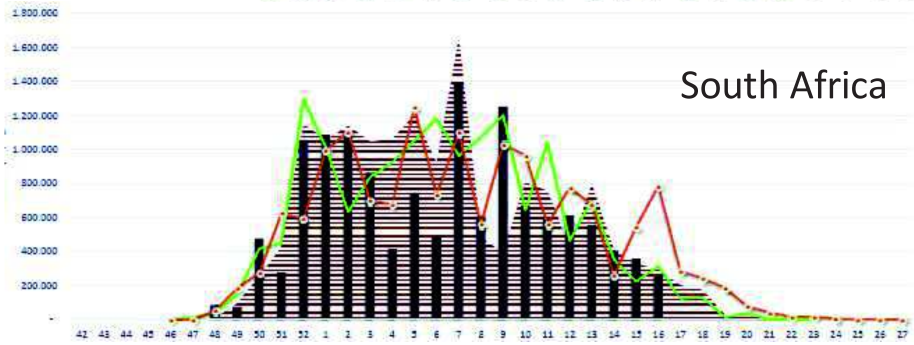
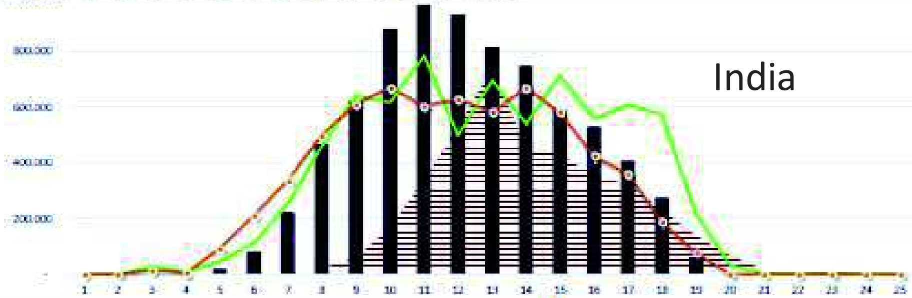
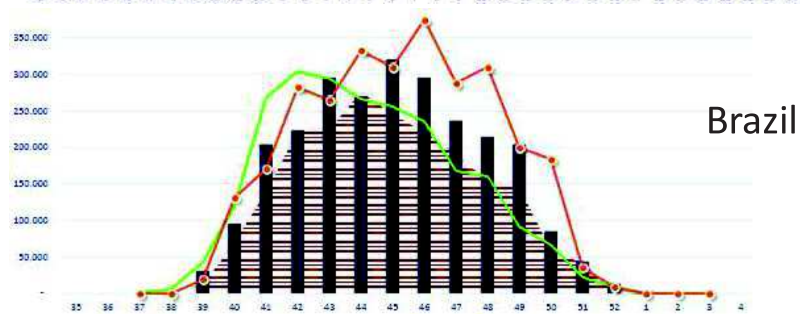
Source: OFS Data August 2018

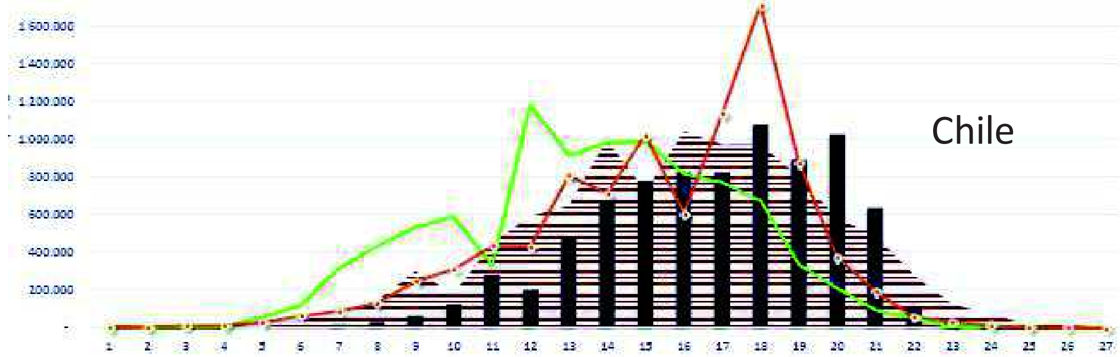
Total Arrivals in the EU-Continent



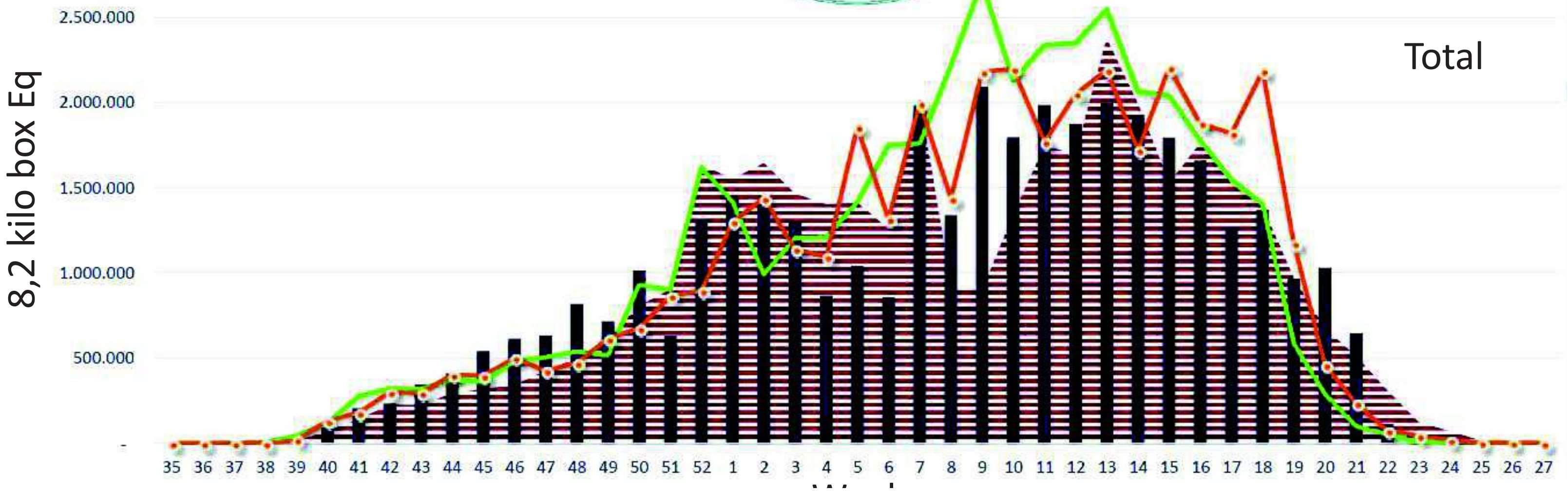


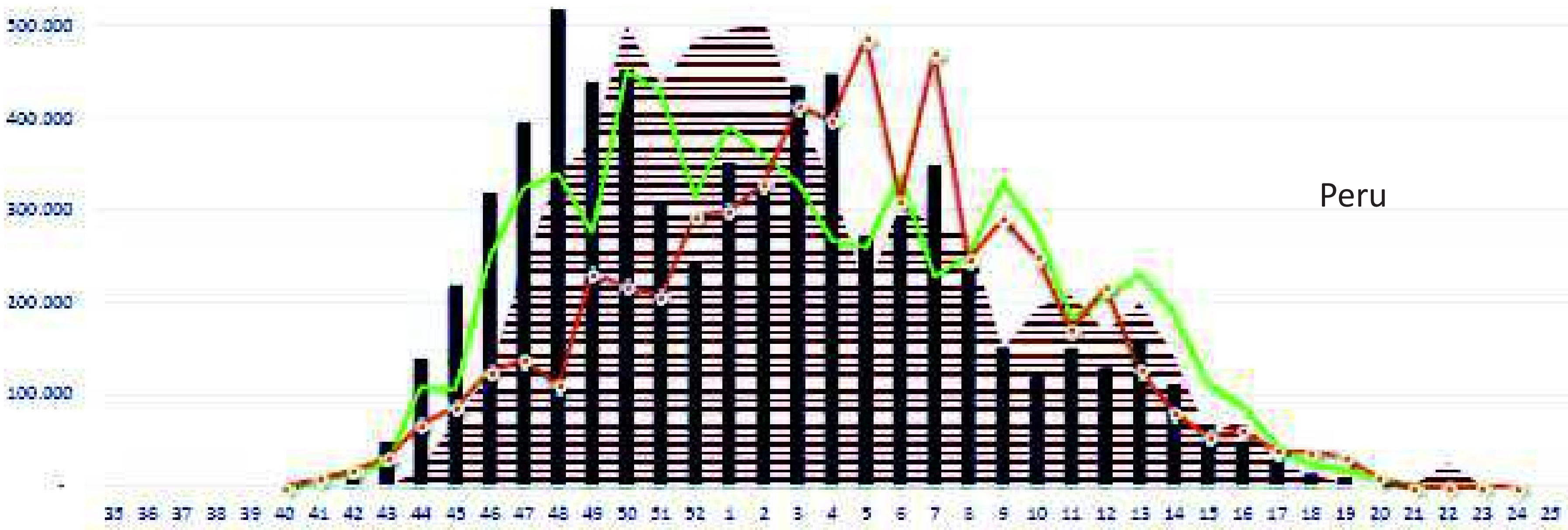






Source: OFS Data August 2018





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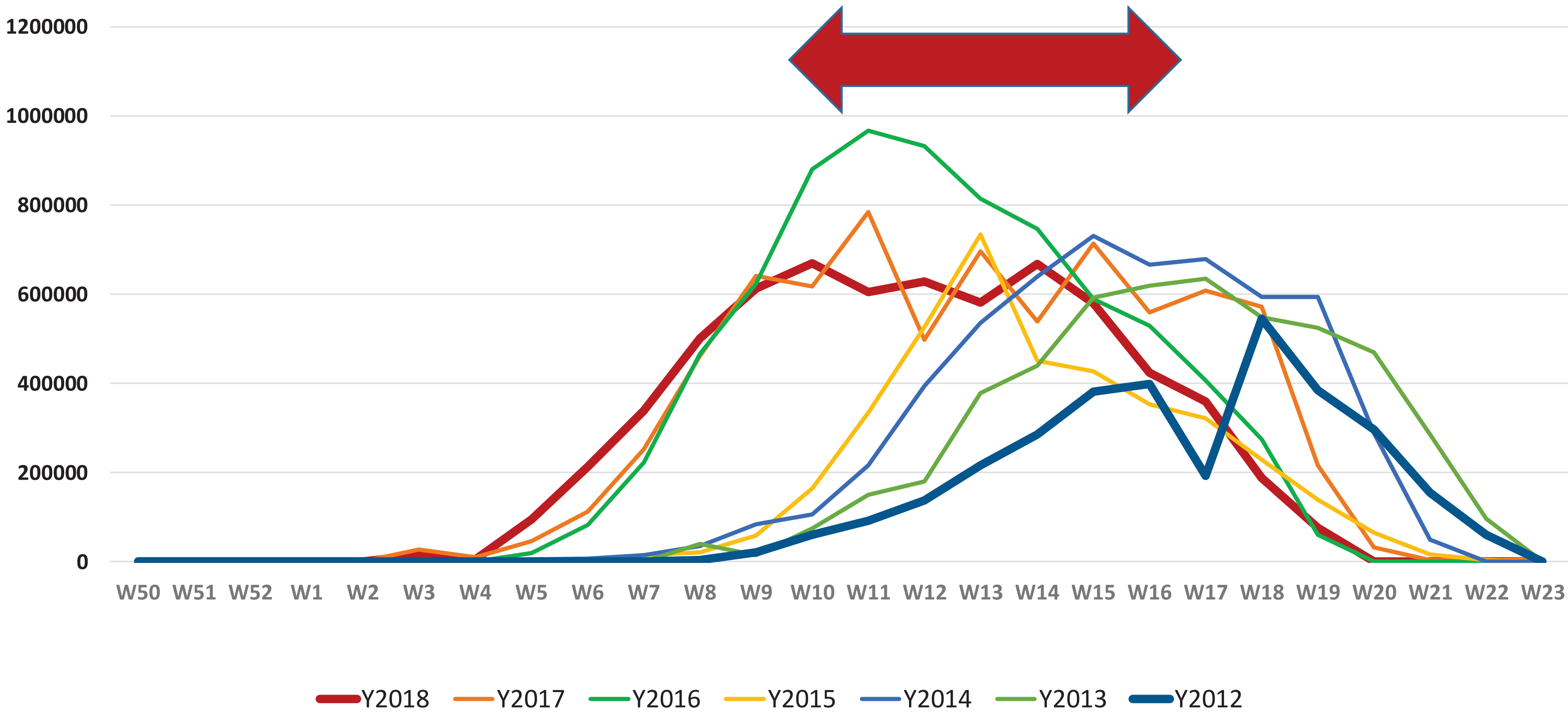
ETA-EU Indian Table Grape in bulk boxes

(mainly 10 x 500 and 90% THS)



Source: information from Sahyadri Export, data compiled by OFS Chile P. Sobarzo 2018, graphic O. Salgado

Uvas India 2018,
Las ultimas cargas del 2017 se vendieron semana26

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SanLucar

India export to EU, Russia Federation is not Included
Updated 11/04/2018

34.856 plots

Date : 11/04/2018

MIS Report - 2017-2018

Summary of registered plots			
State	**Renewed**	**New**	**Total**
Andhra Pradesh	2	68	70
Karnataka	29	43	72
Maharashtra	21161	13553	34714
Total	**21192**	**13664**	**34856**

Summary of Export in the Current Season	
State Name	**Qty. (In MT)**
Maharashtra	89878.216
Karnataka	94.569
Total	**89972.785**

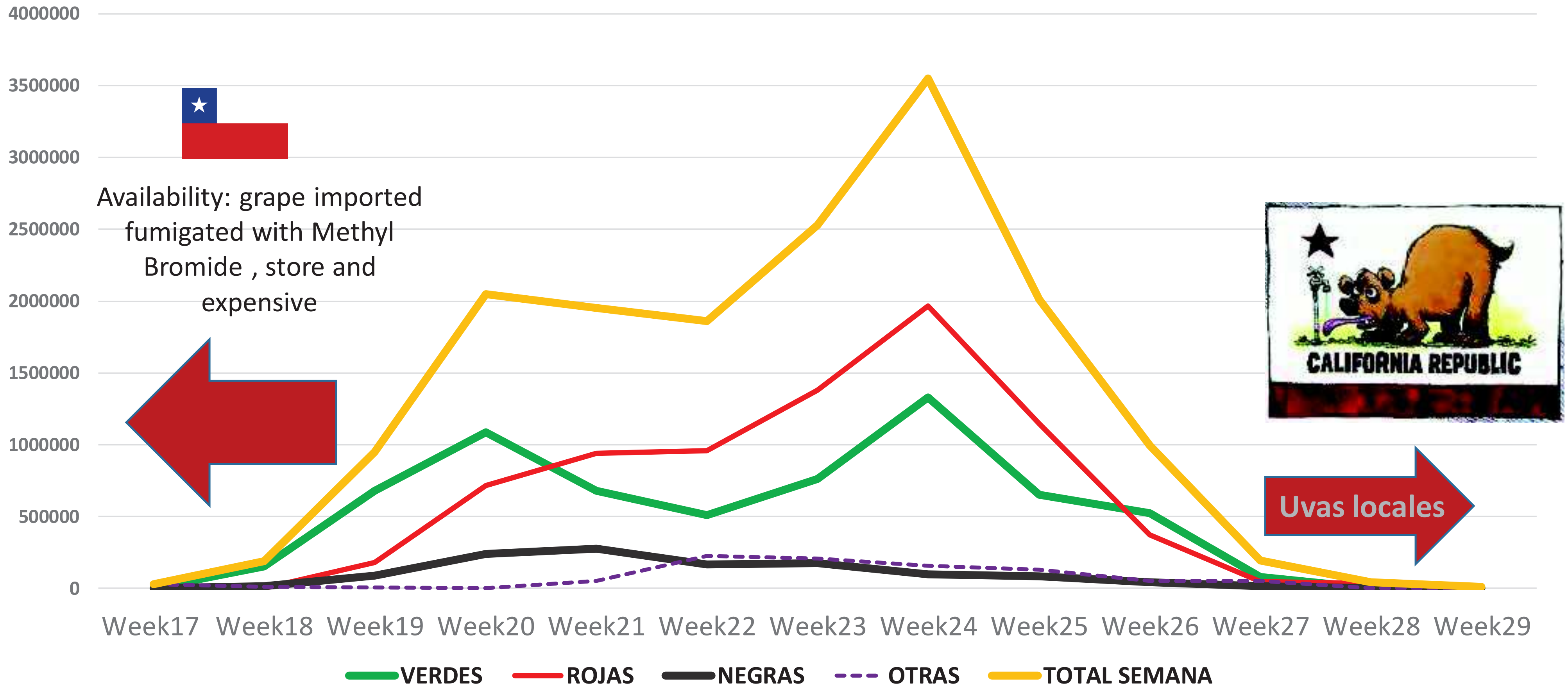
Summary of Export Containers wise as on -11/4/2017 vis a vis 11/4/2018(dd/mm/yyyy)

	MAHARASHTRA		**KARNATAKA**		**ANDHRA PRADESH**		**TELANGANA**		**TOTAL**	
Season	**No.of Container(s)**	**Qty.(In MT)**	**No.of Container(s)**	**Qty.(In MT)**	**No.of Container(s)**	**Qty.(In MT)**	**No.of Container(s)**	**Qty.(In MT)**	**No.of Container(s)**	**Qty.(In MT)**
2017-2018	6859	89972.785	0	0.000	0	0.000	0	0.000	6859	89972.785
2016-2017	6882	90880.566	0	0.000	0	0.000	0	0.000	6882	90880.566

*Note:Due to issuance of PSC from some other location the Export Summary may vary from State wise Report

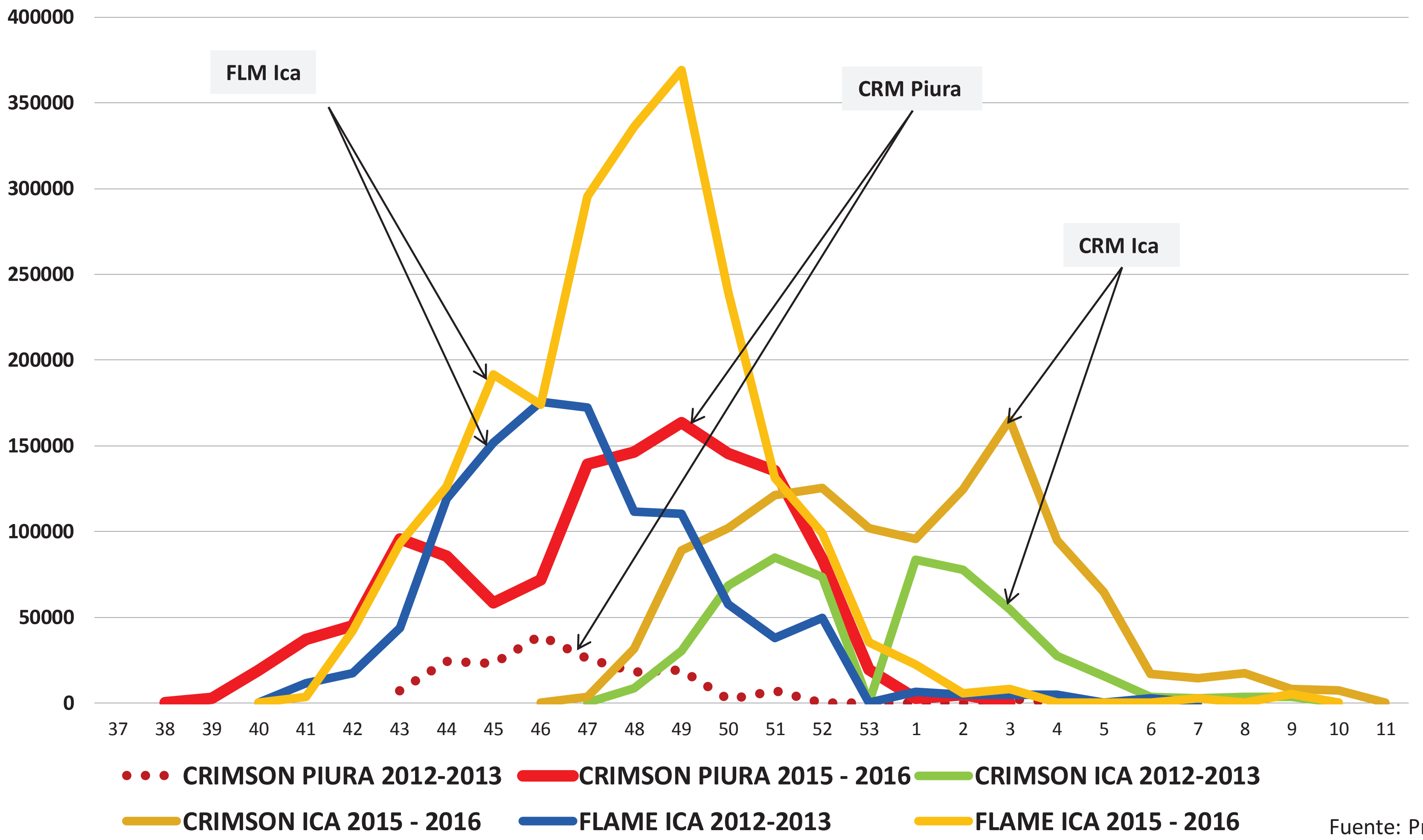
Summary of export - Country wise		
Country Name	**Qty. (In MT)**	**No. of Containers**
The Netherlands	47917.624	3608
Germany	15976.191	1237
United Kingdom	14963.797	1176
Denmark	2220.864	171
Finland	1804.800	147
Belgium	1796.410	144
Norway	1001.720	82
Latvia	706.868	41
France	696.078	45
Lithuania	650.150	42
Italy	447.722	33
Switzerland	394.640	32
Spain	306.550	22
Ireland	287.285	20
Sweden	263.445	21
Austria	222.528	17
Poland	213.401	14
Czech Republic	72.112	5
Greece	30.600	2
Total	**89972.785**	**6859**

Departure of Table Grape 3 colors all market , Mexico 2018



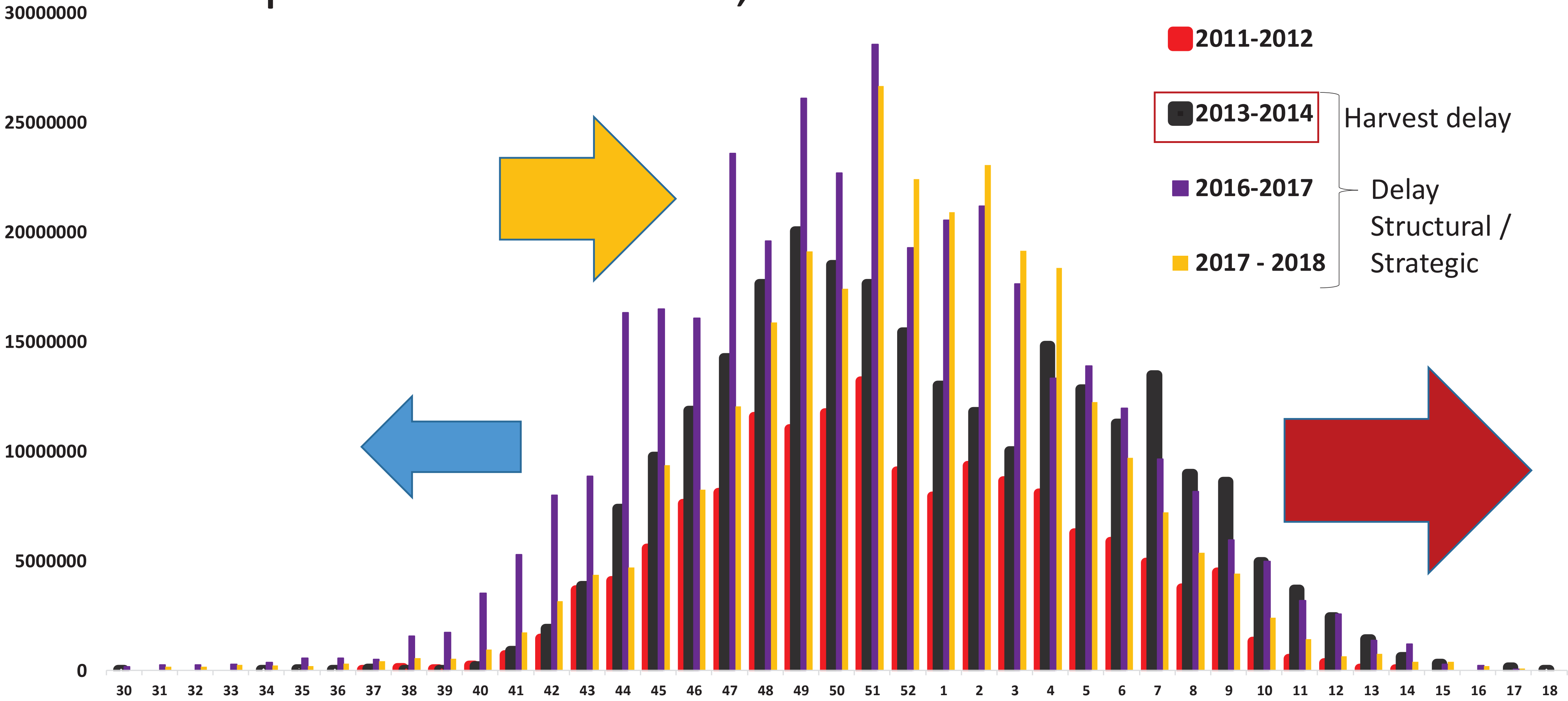
Source: Asociación Agrícola Local de Productores de Uva de Mesa Hermosillo, Sonora, México 2018

FLM v/s CRM all in 8,2 kilo boxes ETD Peru



Fuente: Provid 2016

Departures from Peru, all markets all Varieties



Fuente: Provid /Senasa 2018

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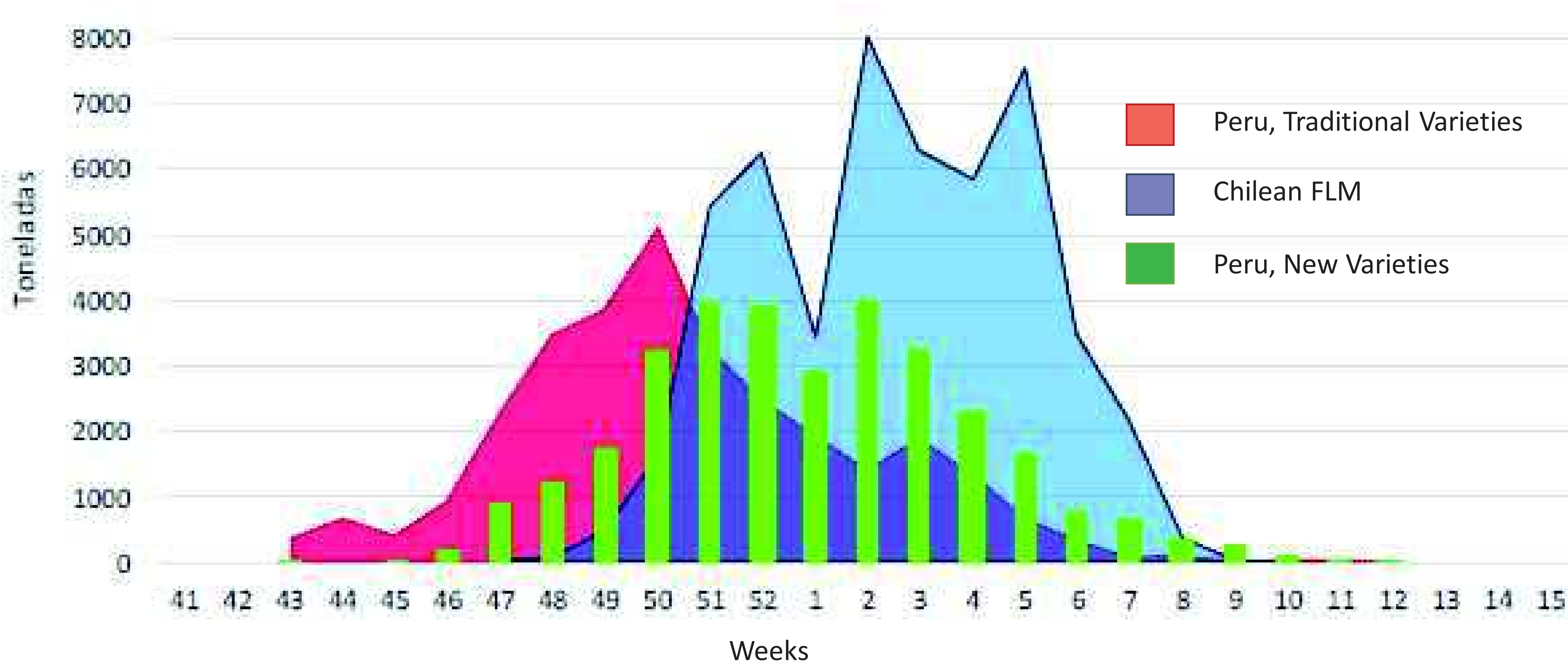
Weekly Red seedless export in to the USA 2017/18



Fuente: ASOEX – SENASA, Elaborado por Decofrut 2018

		2017-2018		2016-2017	
VARIEDAD	color	CAJAS 8,2 Kg	%	CAJAS 8,2 Kg	%
RED GLOBE	red	16.648.543	49,5%	23.064.741	57,7%
CRIMSON	red	3.106.116	9,2%	3.306.573	8,3%
SUGRAONE	grn	2.718.111	8,1%	4.395.054	11,0%
FLAME	red	2.130.625	6,3%	2.137.057	5,3%
TIMPSON	grn	1.044.441	3,1%	475.960	1,2%
SWEET CELEBRATION	red	923.889	2,7%	582.249	1,5%
SWEET GLOBE	grn	872.170	2,6%	313.309	0,8%
THOMPSON	grn	717.479	2,1%	1.068.755	2,7%
ARRA 15	grn	673.027	2,0%	581.454	1,5%
JACKS SALUTE	red	358.006	1,1%	125.280	0,3%
MAGENTA	red	334.842	1,0%	409.879	1,0%
SCARLOTTA	red	167.900	0,5%	77.176	0,2%
TIMCO	red	162.141	0,5%	95.172	0,2%
MIDNIGHT BEAUTY	blk	114.635	0,3%		0,0%
SWEET SAPPHIRE	blk	103.870	0,3%	47.712	0,1%
SUMMER ROYAL	blk	89.427	0,3%	50.860	0,1%
ARRA 29	red	87.189	0,3%	9.772	0,0%
EARLY SWEET	grn	70.543	0,2%	195.039	0,5%
ALLISON	red	68.376	0,2%		0,0%
SABLE SEEDLESS	blk	66.623	0,2%	35.592	0,1%
SUGAR CRISP	grn	61.622	0,2%	63.606	0,2%
AUTUMN ROYAL	blk	58.120	0,2%	108.177	0,3%
BLACK SEEDLESS	blk	53.208	0,2%	54.087	0,1%
SWEET JUBILEE	blk	51.929	0,2%	247.684	0,6%
SWEET ENCHANTMENT	red	50.117	0,1%	69.188	0,2%
COTTON CANDY	grn	37.601	0,1%	6.825	0,0%
MAYLEN (INIA GRAPE ON	blk	17.734	0,1%	4.580	0,0%
ARRA 13	grn	7.200	0,0%	10.800	0,0%
CENTENNIAL	grn	6.480	0,0%	9.880	0,0%
PRISTINE	grn	6.126	0,0%		0,0%
ARRA 18	blk	3.744	0,0%	8.872	0,0%
AUTUMN CRISP	grn	3.600	0,0%		0,0%
KRISSY	red	3.600	0,0%		0,0%
SWEET JOY	blk	3.179	0,0%	2.160	0,0%
SWEET MAYABELLE	red	3.049	0,0%	7.084	0,0%
SWEET INSPIRATION		2.891	0,0%		0,0%
IVORY	grn	1.800	0,0%		0,0%
SWEET NECTAR	red	1.800	0,0%	3.726	0,0%
KELLY	grn	1.800	0,0%		0,0%
MIX GRAPES		2.813.310	8,4%	2.424.315	6,1%
TOTAL		**33.646.862**	**100,0%**	**39.992.618**	**100,0%**

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COLOR	%
Black	1,7%
Green	18,5%
red	71,5%
(no name)	8,4%
Total	**100,0%**

PERÚ 2017-2018

		2017-2018		2016-2017	
VARIEDAD	color	CAJAS 8,2 Kg	%	CAJAS 8,2 Kg	%
RED GLOBE	red	16.648.543	49,5%	23.064.741	57,7%
CRIMSON	red	3.106.116	9,2%	3.306.573	8,3%
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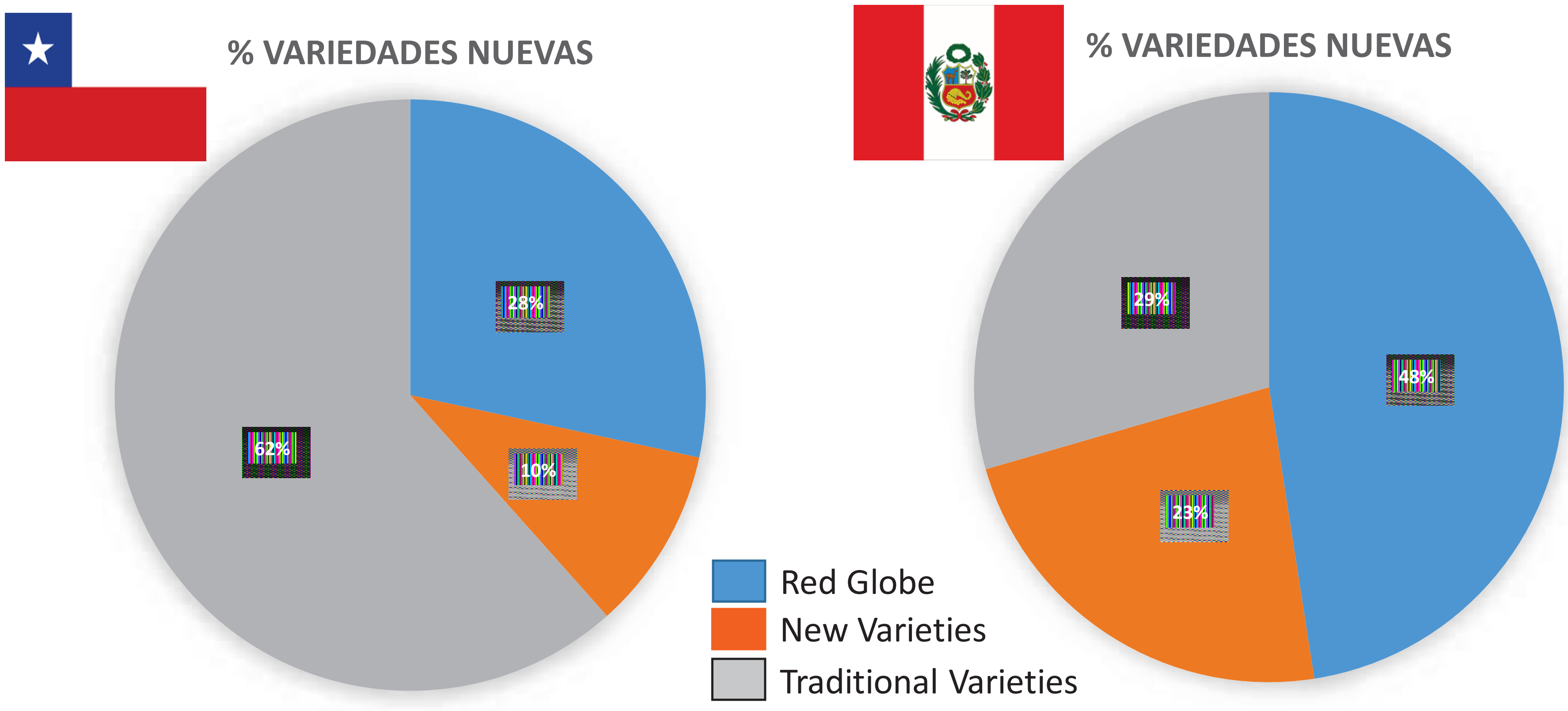
JACKS SALUTE	red	358.006	1,1%	125.280	0,3%
TOTAL		**33.646.862**	**100,0%**	**39.992.618**	**100,0%**

New varieties =	**8.023.554**
	23,8%

Source: from M. Silva, data Provid/SENASA 2018

% of New Varieties in Chile and Peru



Fuente: from M. Silva adapted from ASOEX 2018 y PROVID

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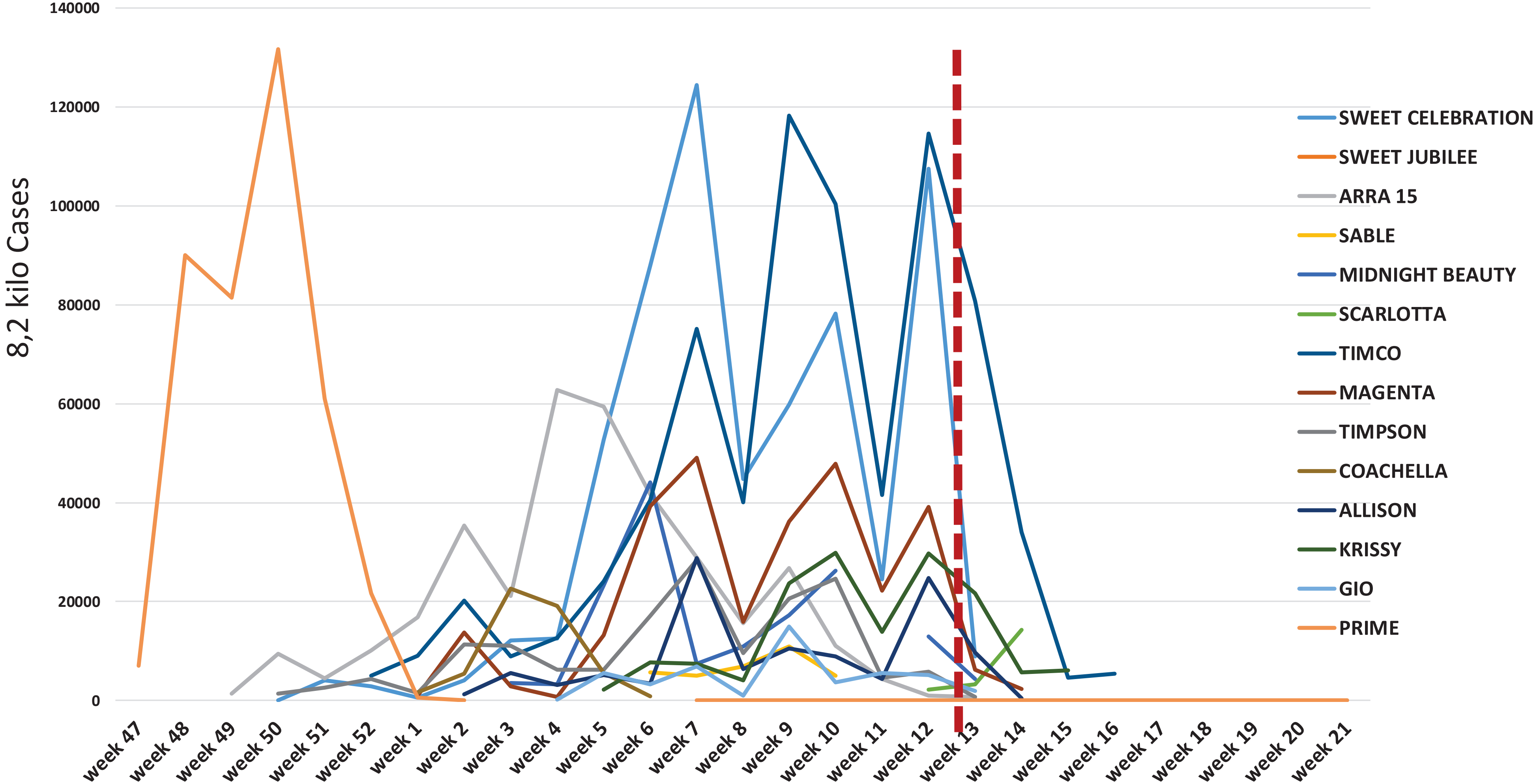
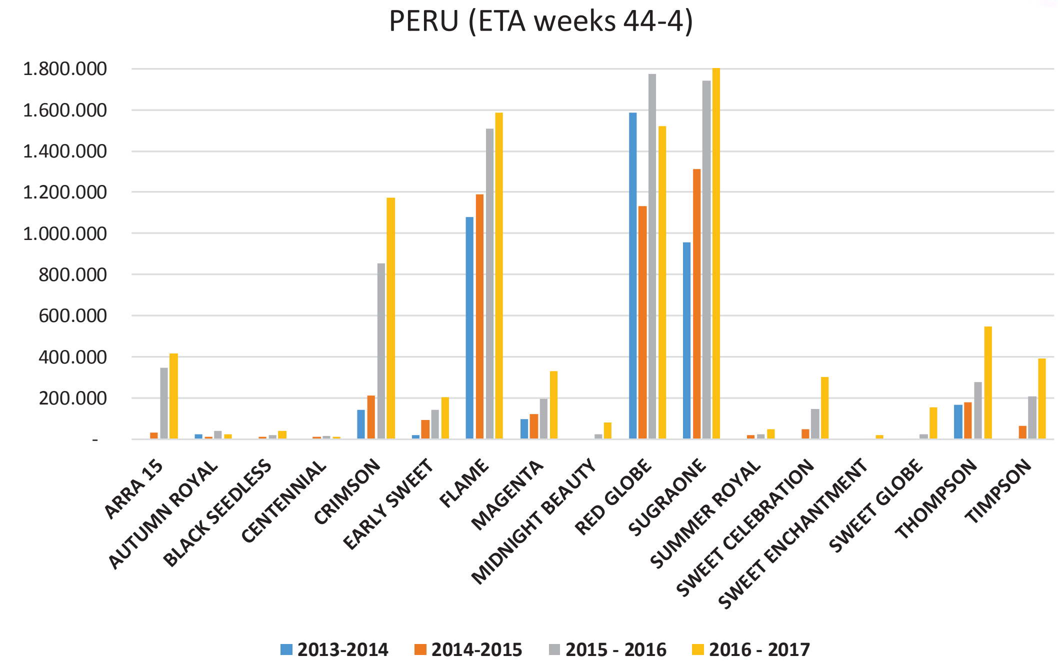
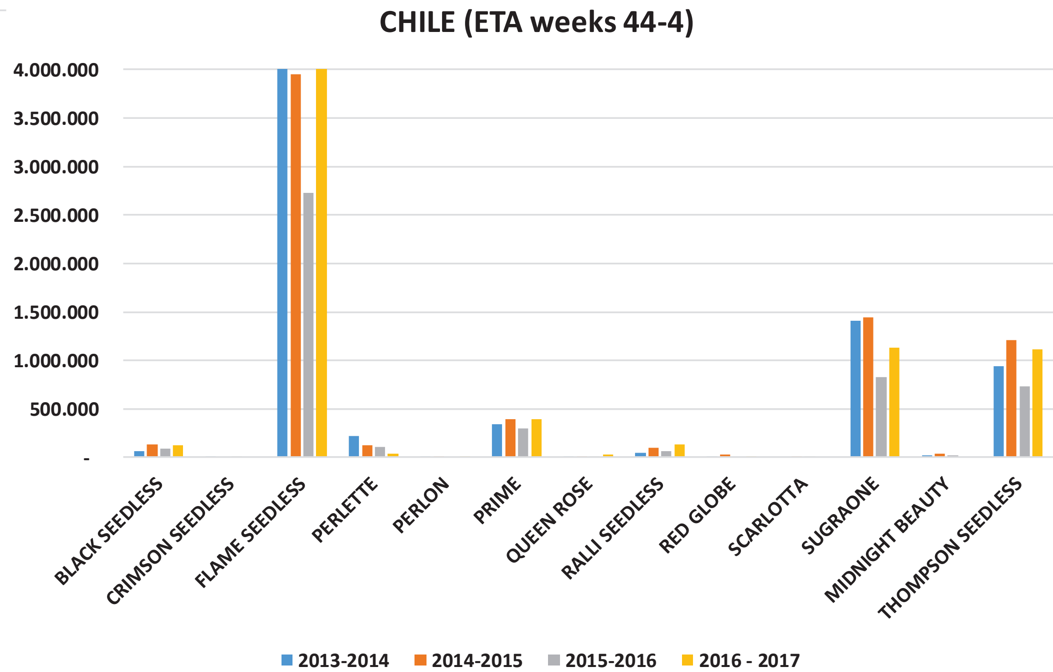
2016-2017 ETD weeks from Chile American Market



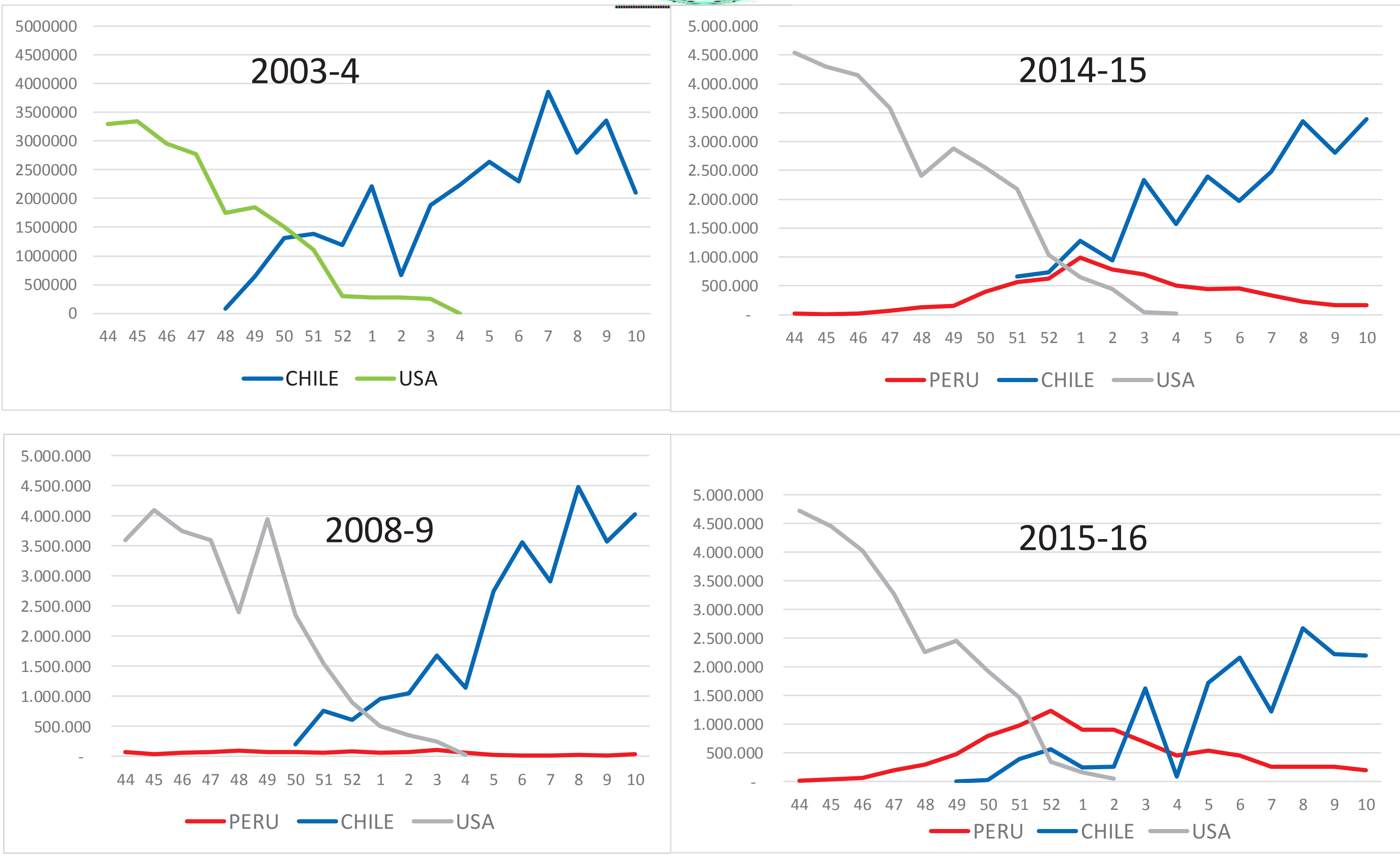
Source: P. Sobarzo 2017 data ASOEX/





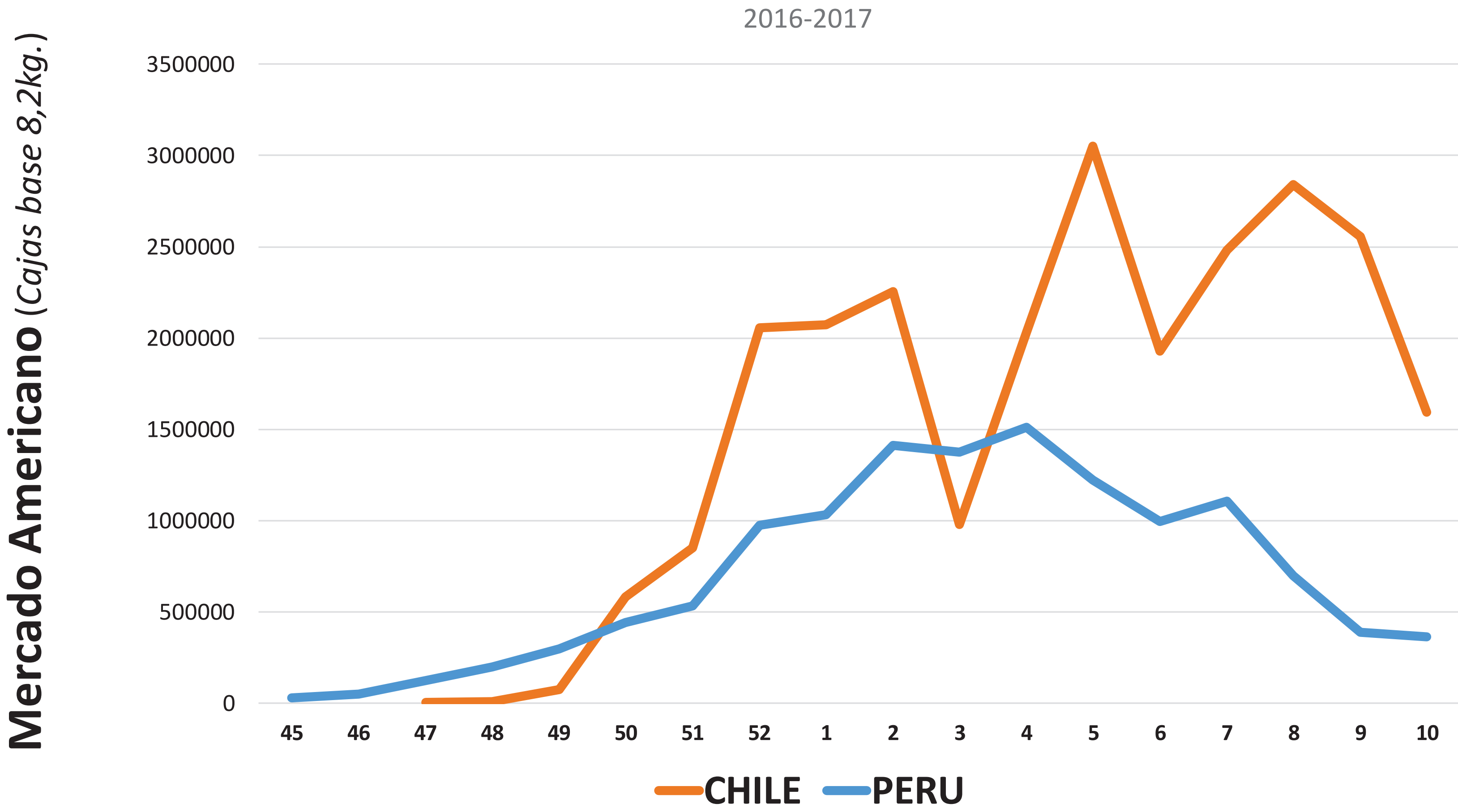
Source: P. Sobarzo 2017 data ASOEX/

Mercado Americano *(Cajas base 8,2kg.)*

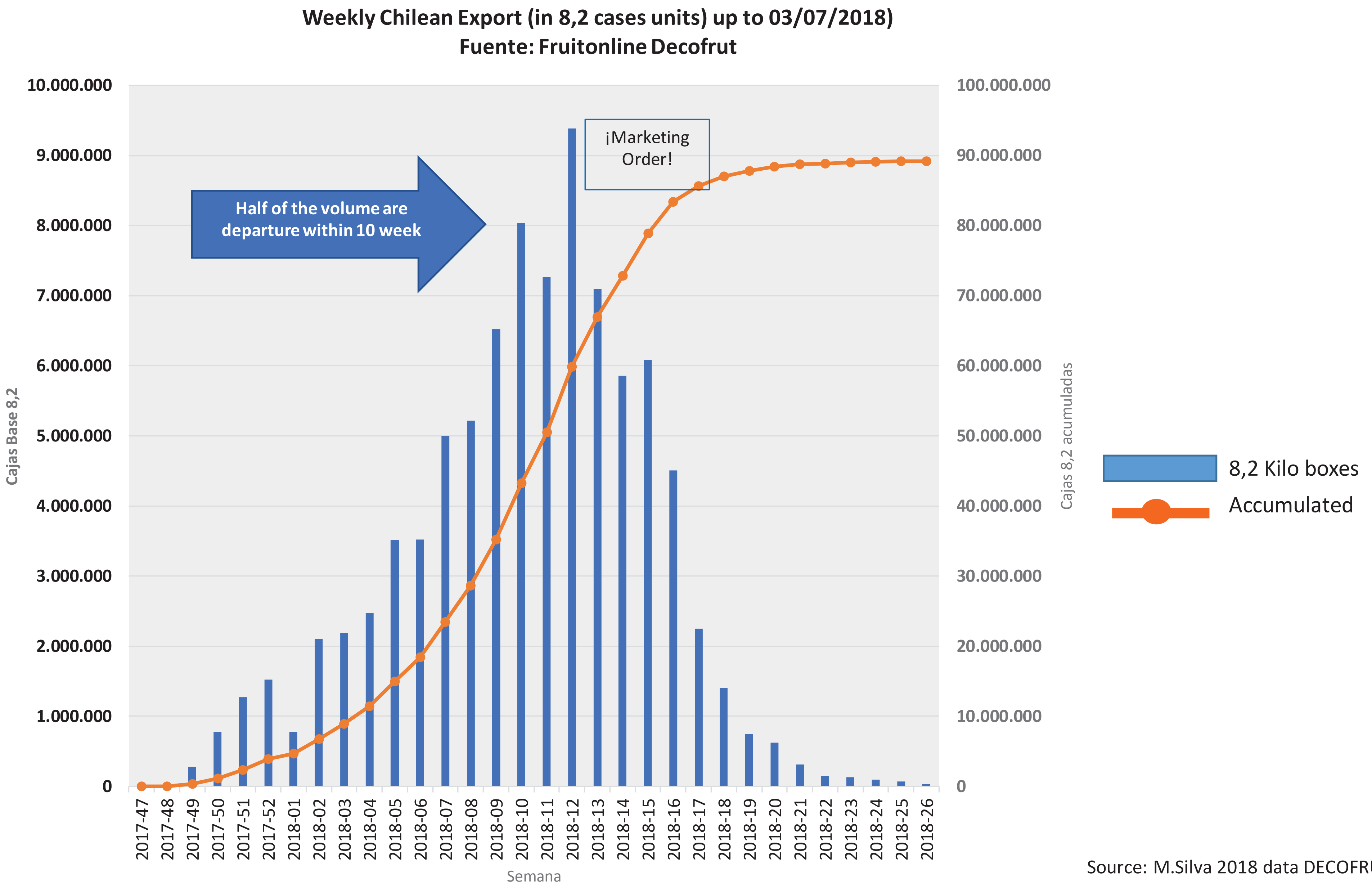


Peru is covering faster the transition after California Table Grape and Chile

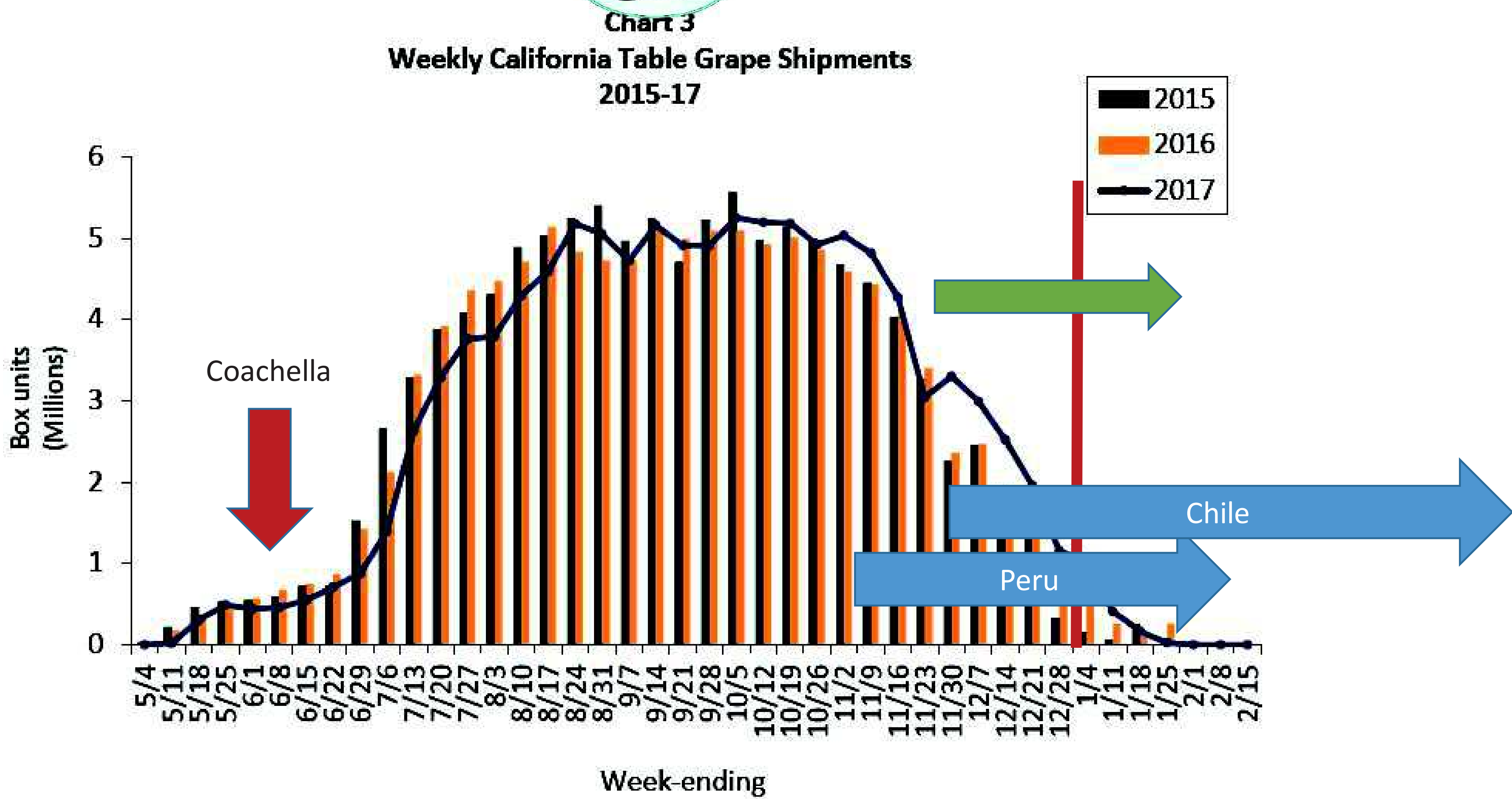
Source: P. Sobarzo 2017 data ASOEX/



Source: P. Sobarzo 2017 data ASOEX/



Source: M.Silva 2018 data DECOFRUT



Source: CTGC 2018

Table 1
Top 15 Varieties by Volume in 2017
2015-17 (Box Units)

Rank in 2017	Variety	2017	2016	2015
1	Scarlet Royal	17,689,509	19,013,066	17,687,688
2	Autumn King	16,363,163	13,974,311	15,058,421
3	Flame Seedless	11,815,282	12,335,391	14,418,957
4	Sugraone[1]	6,119,807	6,314,691	6,659,352
5	Blanc Seedless[2]	5,423,597	4,230,243	4,428,859
6	Autumn Royal	4,374,434	5,365,081	4,947,469
7	Red Globe	3,781,468	6,052,698	7,407,860
8	Crimson Seedless	3,563,955	7,489,710	8,783,341
9	Sheegene-20[3]	3,083,500	820,729	117,487
10	Princess	2,778,858	3,568,543	4,479,138
11	IFG 68-175[4]	2,488,166	2,640,658	2,533,392
12	Sugranineteen[5]	2,398,614	1,521,080	1,667,976
13	Sheegene-13[6]	2,327,149	1,317,487	746,349
14	Sheegene-17[7]	2,308,944	1,813,697	1,135,788
15	C51-63[8]	1,992,193	2,495,588	2,065,126

Source: CTGC 2018

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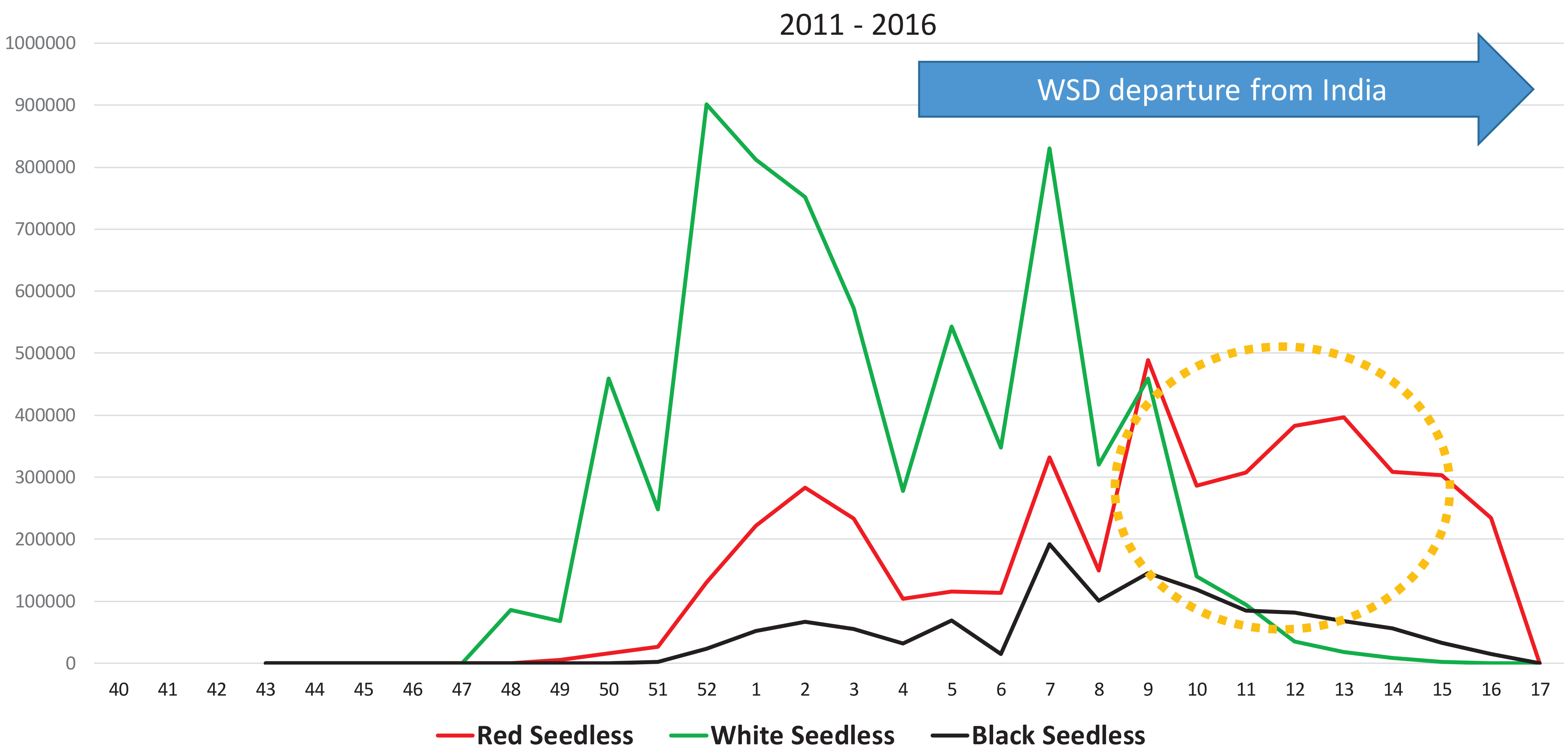
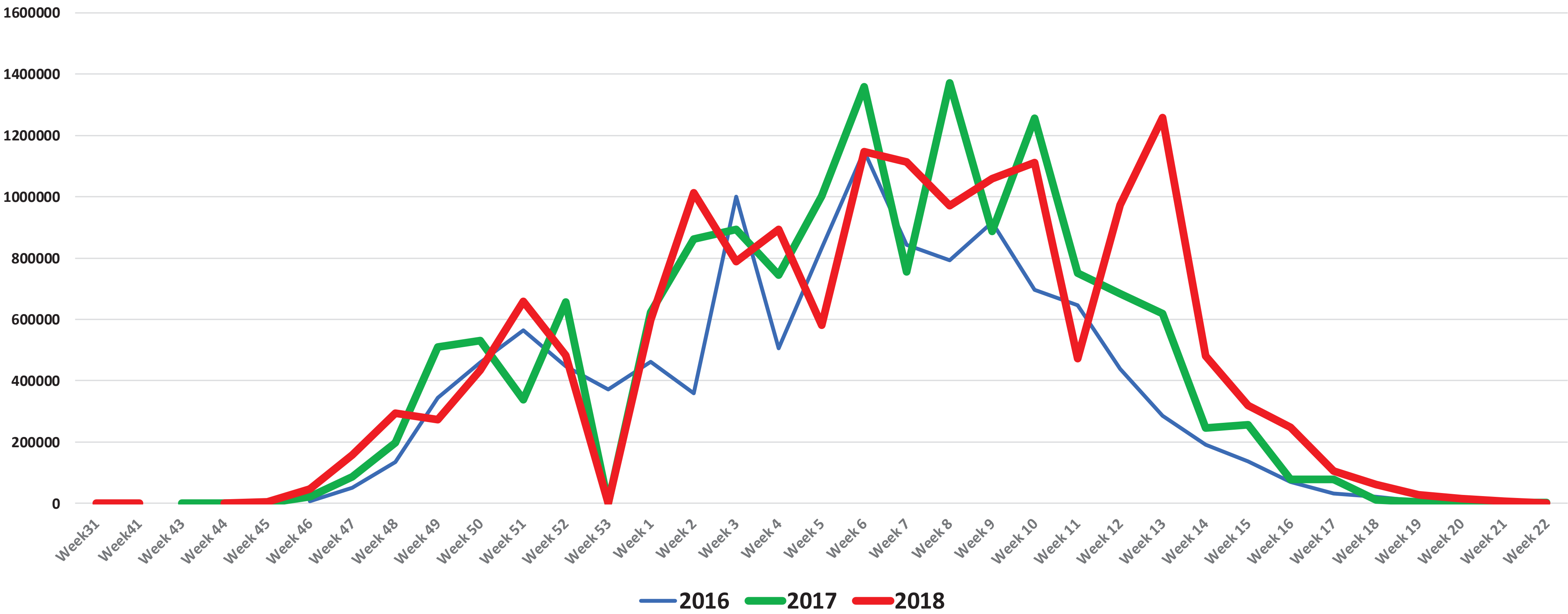
South Africa Red Seedless departures in 4,5 kilo boxes



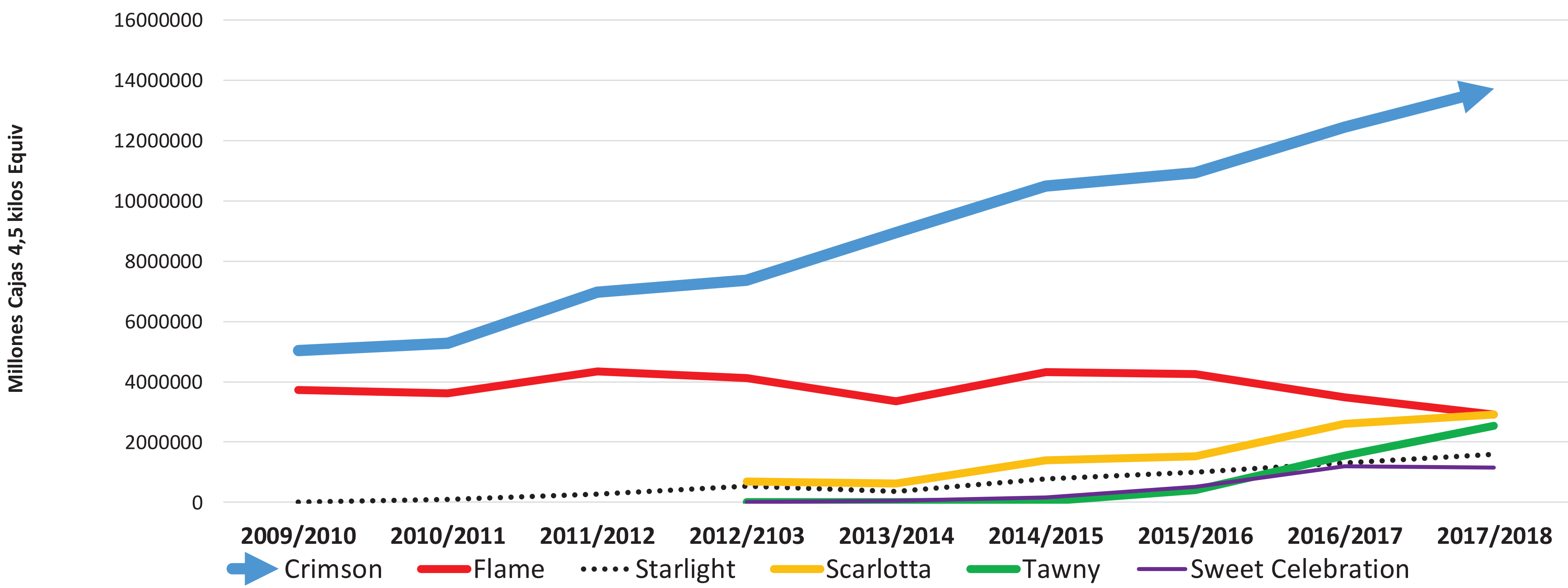
Fuente: SATI 2016

Red Seedless South Africana departures in 8,2 kilo unit boxes



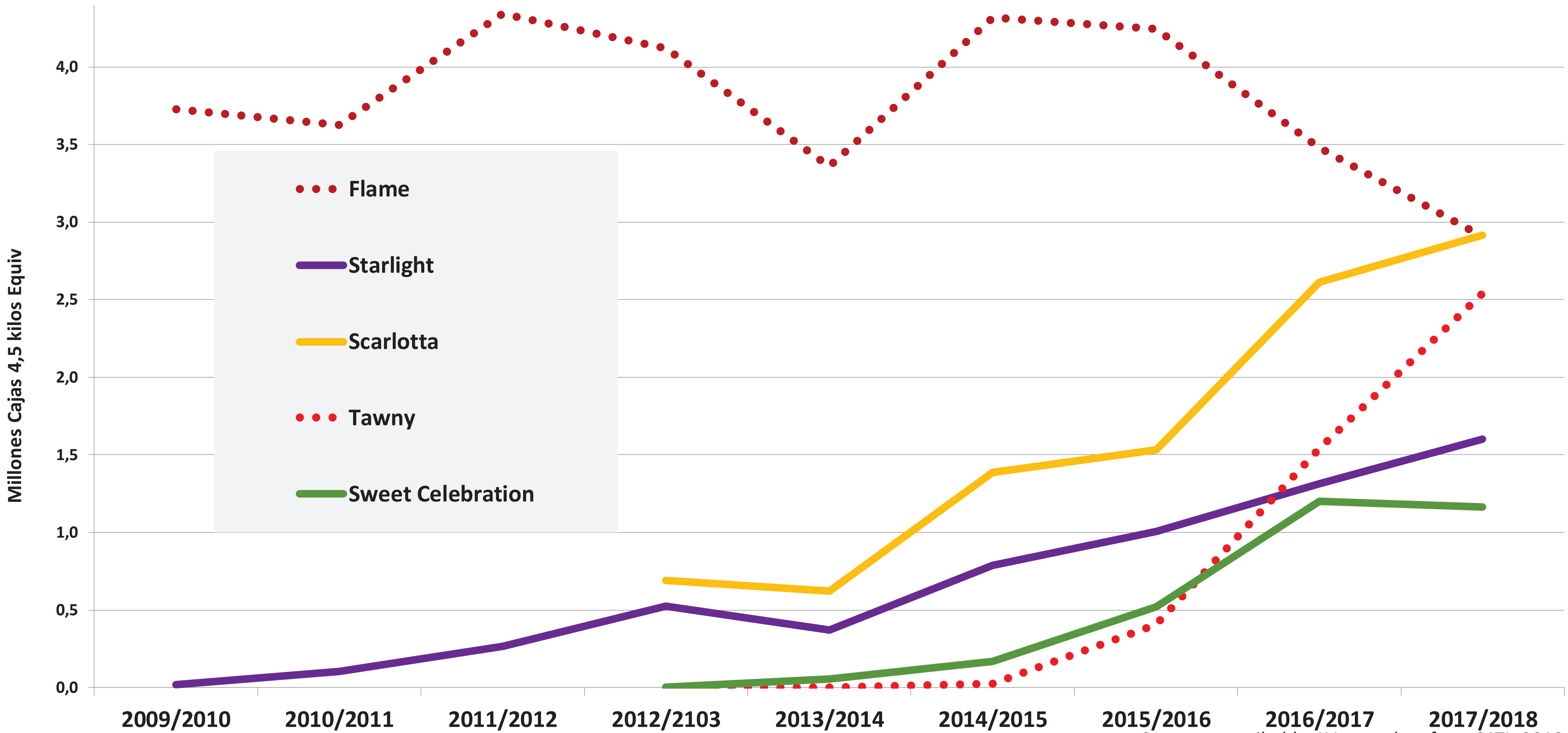
Fuente: Provid 2018

Red Seedless in 4,5 kilos export to all Markets South Africa



Source: compiled by K.Louw, data from SATI, 2018

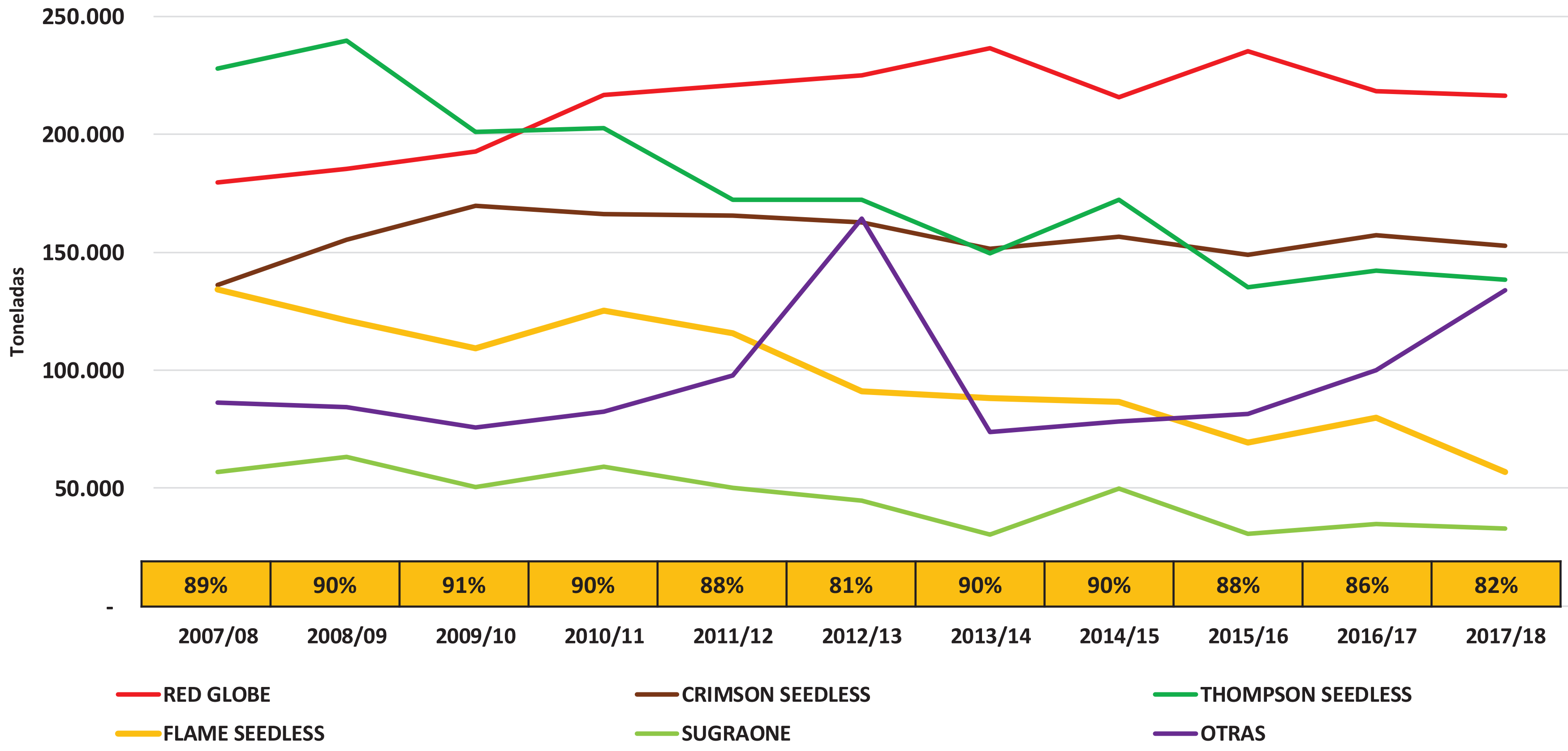
Red Seedless (except CRM) export to all Markets South Africa



Source: compiled by K.Louw, data from SATI, 2018

Chilean export, traditional Varieties

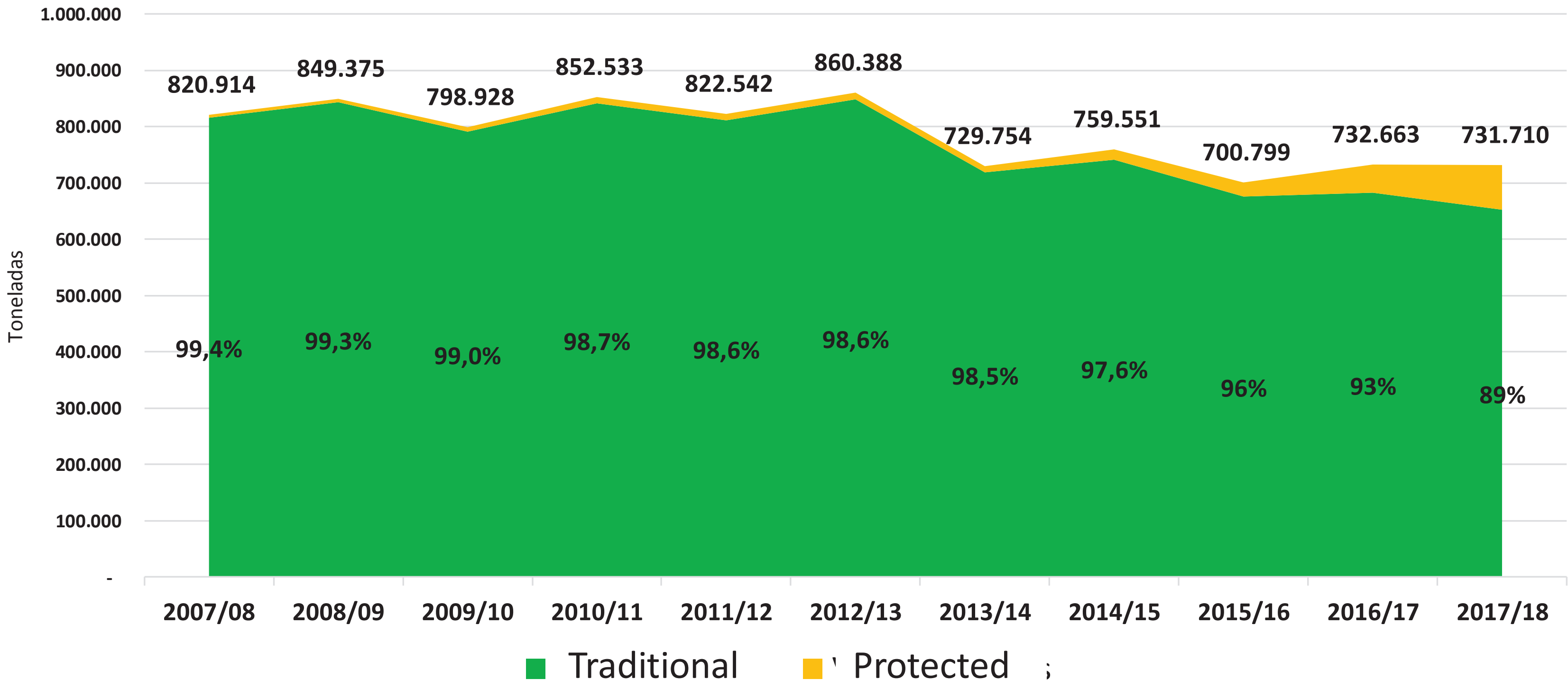
Source: SAG-ASOEX / compiled by iQonsulting



Fuente: SAG-ASOEX / Elaborado por iQonsulting

Chilean export protected varieties and traditional varieties

Fuente: SAG-ASOEX / Elaborado por iQonsulting



Fuente: SAG-ASOEX / Elaborado por iQonsulting

What is demanding the USA Market?

-top 20 fruits & vegetables

Fruits*			Vegetables*		
1	Bananas	73%	1	Potatoes	68%
2	Apples	69%	2	Onions	66%
3	Grapes	62%	3	Tomatoes	63%
4	Strawberries	62%	4	Carrots	60%
5	Oranges	56%	5	Bell peppers	53%
6	Watermelon	54%	6	Lettuce	53%
7	Lemons	48%	7	Broccoli	51%
8	Blueberries	45%	8	Salad mix	50%
9	Peaches	42%	9	Cucumbers	49%
10	Pineapple	42%	10	Celery	46%

Fuente: Industry Trends 2018 - THE PACKER

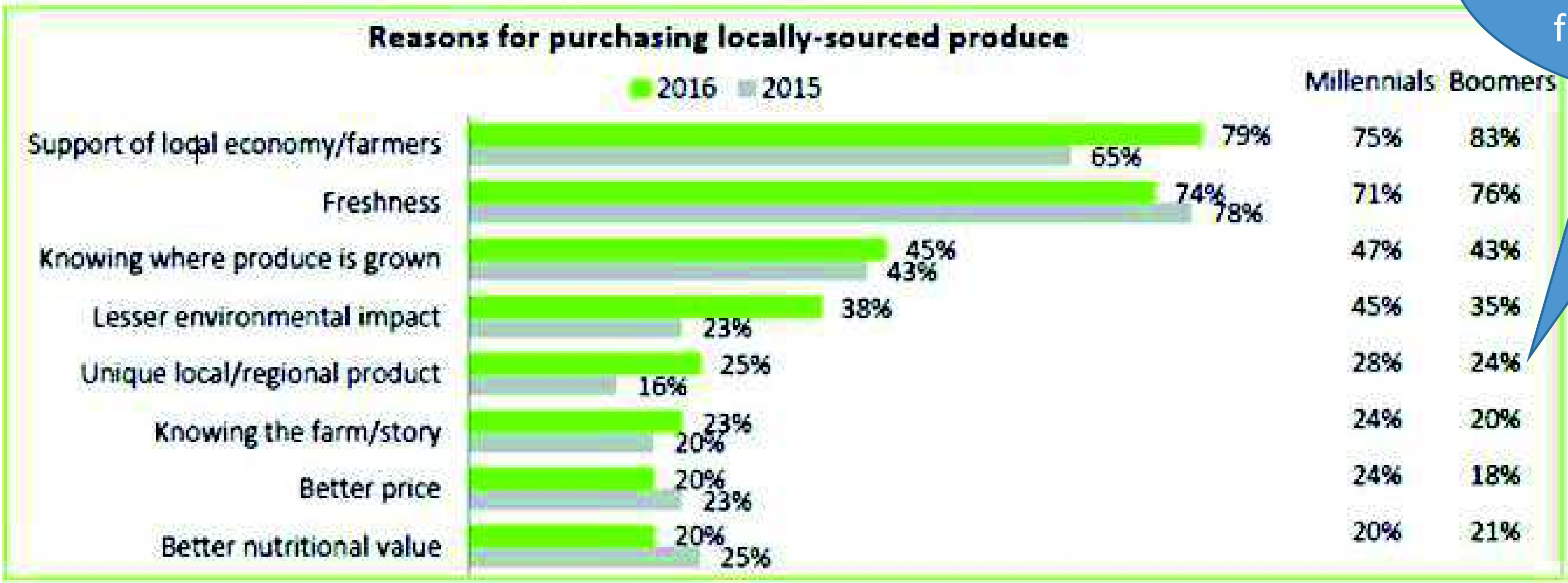
Local

- Local sourcing is a growing trend. Consumers are becoming more ethically and sustainably minded. Local ranges can win shopper loyalty and gain a more environmentally aware consumer base. Business advantages in efficiency and sustainability can also be made.
- Typically with local products, quality is highlighted over value credentials. The fresh category contains great examples of retailers using local supply chains. It also provides inspiration on how to effectively promote local products in-store.
- Stores are looking to become 'hyperlocal'. Despite many shoppers being globally minded, the desire to have links to local regions and buy local products will increase.
- Retailers will need to support SMEs positively perceived by shoppers, helping them to feel part of their local community. This will result in retailers selling more seasonal ranges with varying availability; adding uniqueness and increased demand.

Source: IDG Retails Analysis 2018

In USA are a preference for the Local produce

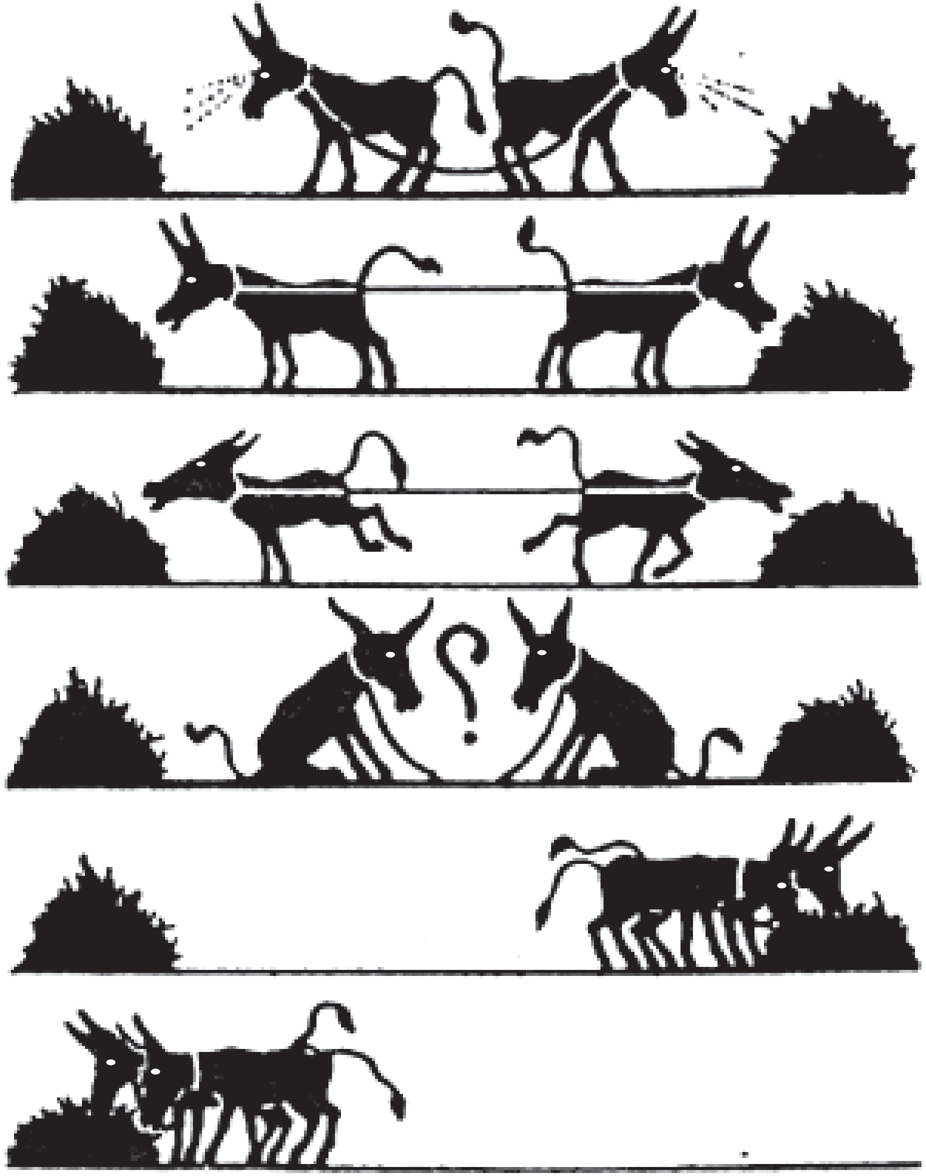
Fresh 0 Local, 61% shows high interest to purchase Local fruits and vegetables

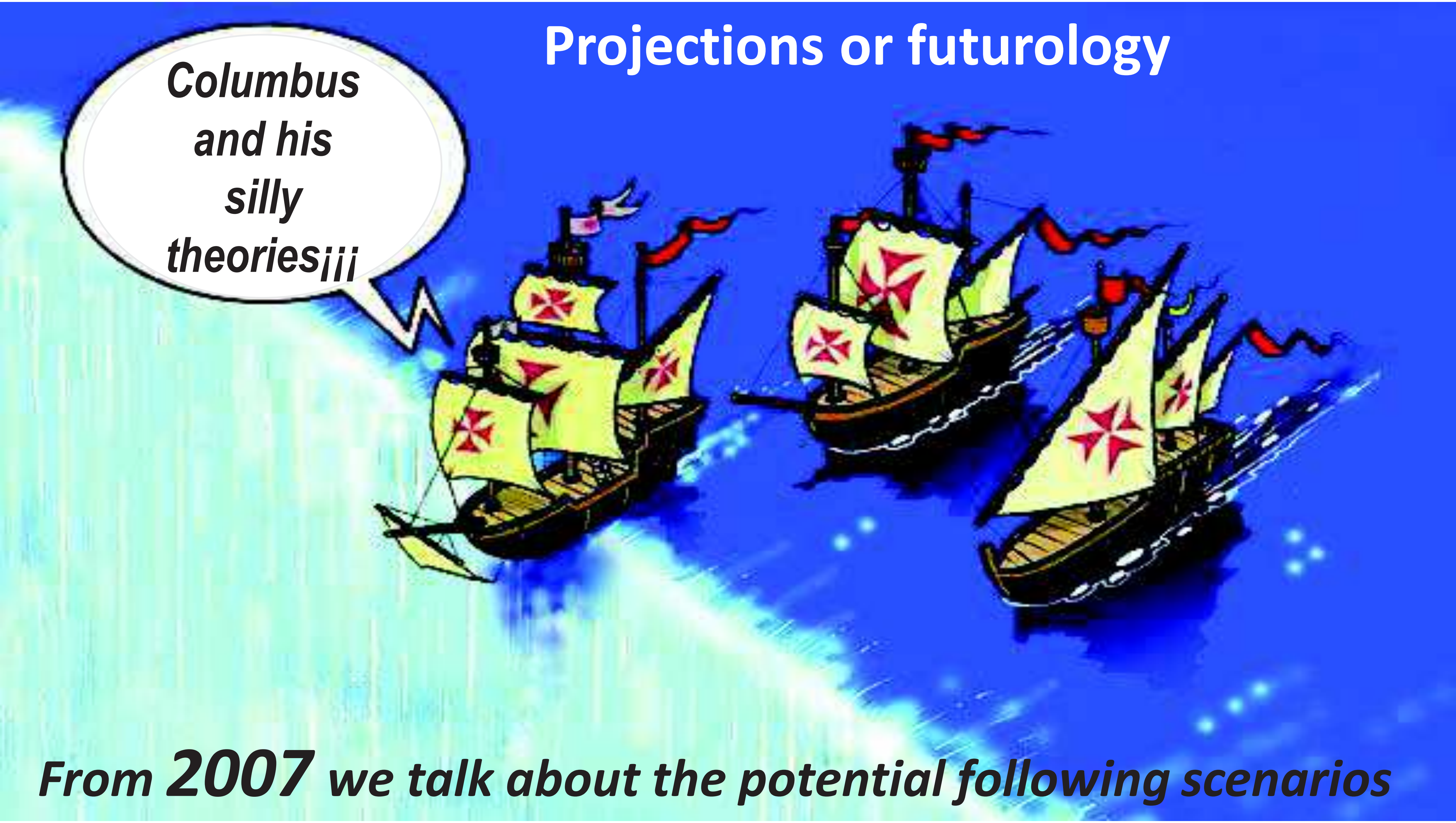


91% of consumers prefer California grapes over other origins if prices are the same. 68% still prefer California grapes even if they are priced higher than the imported grapes! (FleishmanHillard Research & Analytics, 2018, U.S. Omnibus 2017 Report.)

Fuente: C. Corssen, Frutera Santa Maria from FMI's 2016 Power of Produce - Publicado en PMA.com el 4-May-2017 y CTGC 2017 Industry Analysys


PEPSI




Projections or futurology
Columbus and his silly theories¡¡¡
From 2007 we talk about the potential following scenarios

The supply table grape map will face a dramatic change in the coming years.

- **The discovering of Tropical or subtropical areas** o (towards the Equator), with dry periods, will allow the movement or manage the harvest, as per the need of each market, windows and periods of unsecure supply.
- **The new varieties (the successful ones)** will enhance the impact of those new areas, use of plastic (early / late /rain/color) since few years a go is a production strategy, but more and more accessible, new PGR (ABO as example) will allow the production in some restrictive areas.
- **While the market are clean-up from looser varieties** (in Chile: Melisa / Princess, Regal, Jade / King Hussein, Red Seedless/ Emperatriz, Down Seedless, Perlette), confusion will be the norm, but the traditional varieties will keep playing a role for a long period of time while remind profitable.
- **Focus or concentrate in Test Blocks** and local evaluation of each one of the varieties, according local production environment, which can be:
    - Production cost (thinning, pruning, summers-hoots removal, harvest)
    - Weather restrictions (color issues, lack of light, rain, heat waves)
    - Market access (Color, sizes, post harvest lifespan)

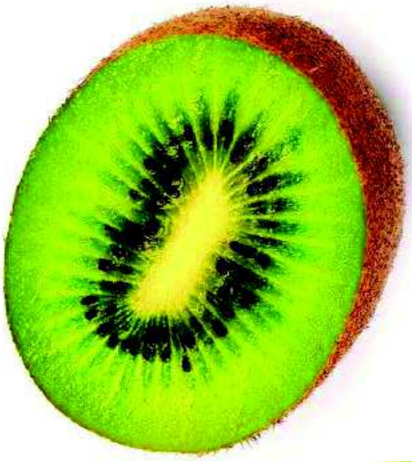
Is not a single formula of evaluation process, selection and decision making process for approve or disregard a varietie.

Princes / Melissa is a relative successful varieties in CA -US

Source: O. Salgado 2007 - 9 (collaboration de V. Giancaspero)

- **Will be Local Varieties** or for particular agro – ecological environments
- **Each new varieties for a long period of time will have associated a business model** end of the "Free Varieties " or when was possible by pass the payment.
  - Crimson, Flame, Autum Royal, Red Globe y Sugraone
- **Will be also Privet varieties** we might produce them by request
- **Some traditional table grape production areas will tend to disappear** or will reduce the market role, specially in countries / industries "well establish".
- **Time to analyze every single angle of the business** and give a deep thought for the next movement, but we do not have the luxury of the time, collateral damages and lost of a lot of growers / exporters /importers will be a trend.
- **We might need to questioning the participation of some markets** or we might need to abandon some of them.
- **The Table Grape will tend to be a "Commodity"** ……………….52 week
- **Consolidation and concentration of the Production,** less number of producer but bigger.

Source: O. Salgado 2007 - 9 (collaboration de V. Giancaspero)




zero


Heineken
HEINEKEN PILSENER
PREMIUM QUALITY

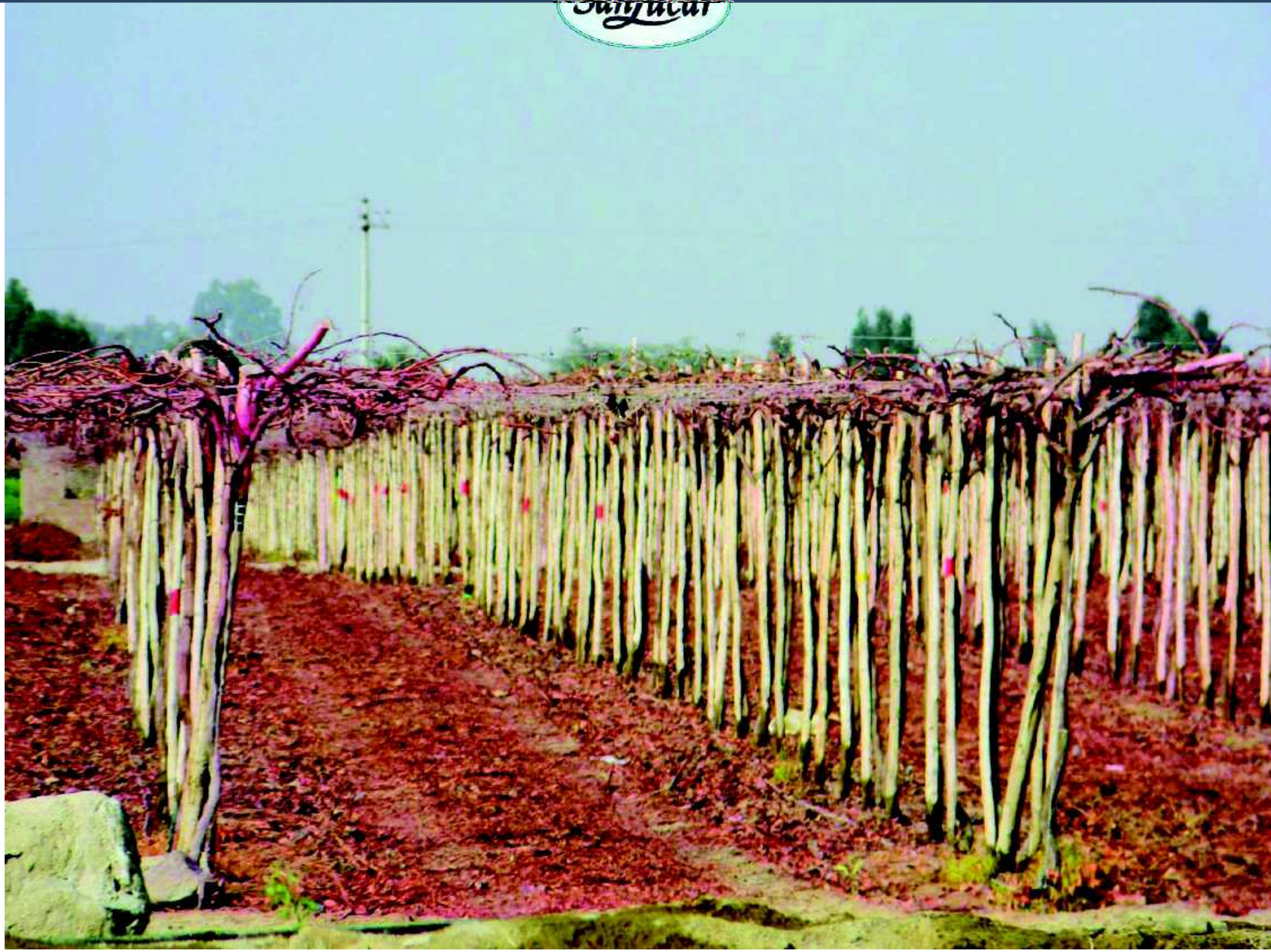

Zespri


Microsoft
Windows xp
Windows is shutting down...

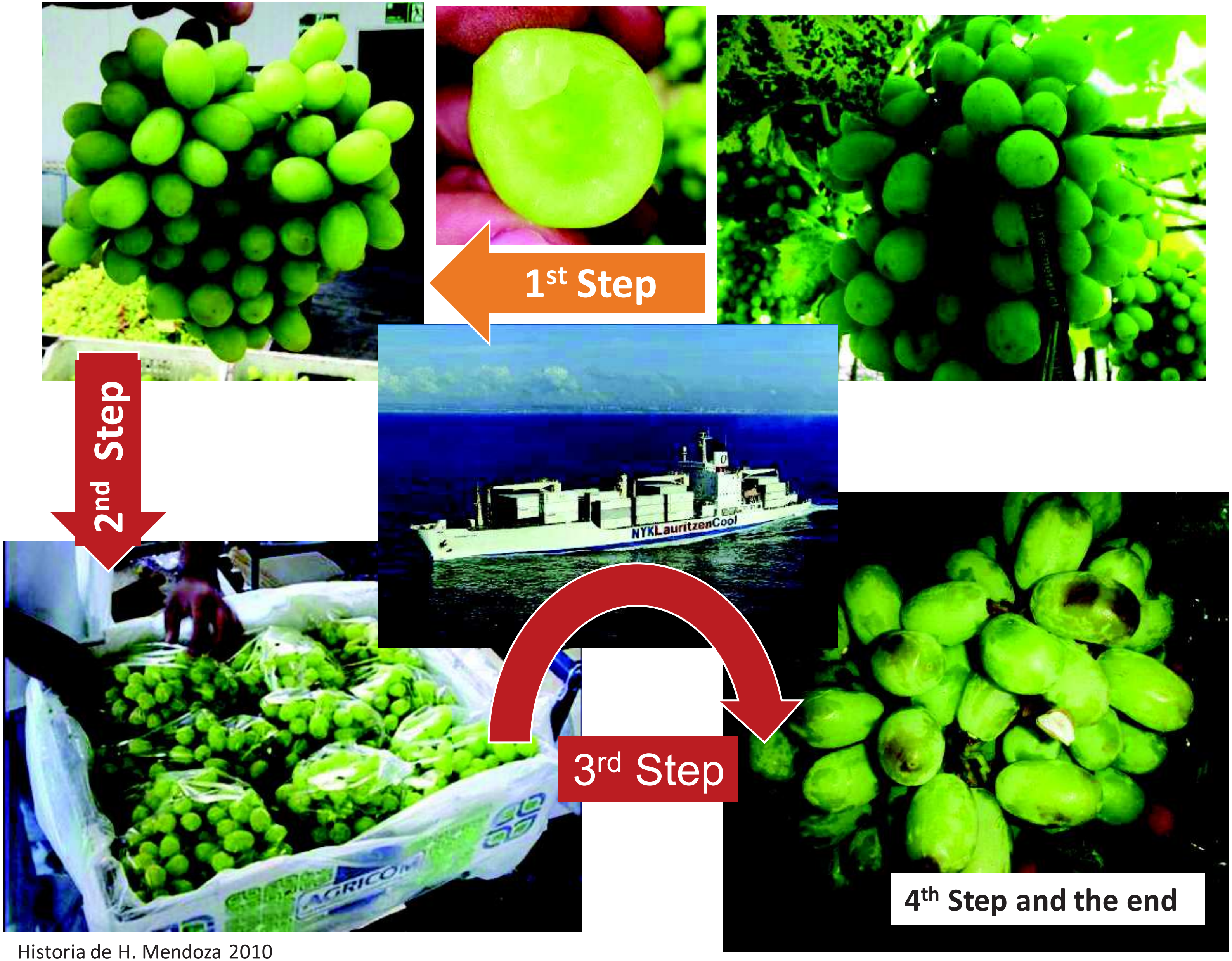
The new victim the Dormex™ Hydroxide Cyanamid

We keep loosing tools

Dormex ™, application by painting 27 USD the litter, 25th of September 2014



Ica After Dormex 2013



Historia de H. Mendoza 2010

So how we see RZA fruit?

With a strong discrepancy between the fruit a the filed, compared at the arrival.

"So we have a Technical Challenge"


Copyright (C) Jose Maria Andres, submitted 05 March

What is quality??

Quality is not post harvest and we defined as:

*“Reach or achieve the expectation and requirement of our clients, aiming to have the **maximum level of customer satisfaction**…………….and then client **repeat the purchase !!!!!!**”.*

Oscar Salgado

Have by default include the fruit condition concept, for the customers is an irrelevant academic discussion.

Quality $\neq$ Condition

This allow us to sort the accountability of our

operation

Quality Problems

- Definition:
  - More static or less dynamic post harvest features or problems, which tend to change more slowly, or not at all during the “commercial shelf life” of the table grape like:
    - Brix (sugar) and acid
    - Color
    - Berry size (in millimeters) un even size among berries
    - Cluster weight
    - Cluster shape
- Associated more directly to packing operation and mismanagement at the pack house, sorting and packing as such.

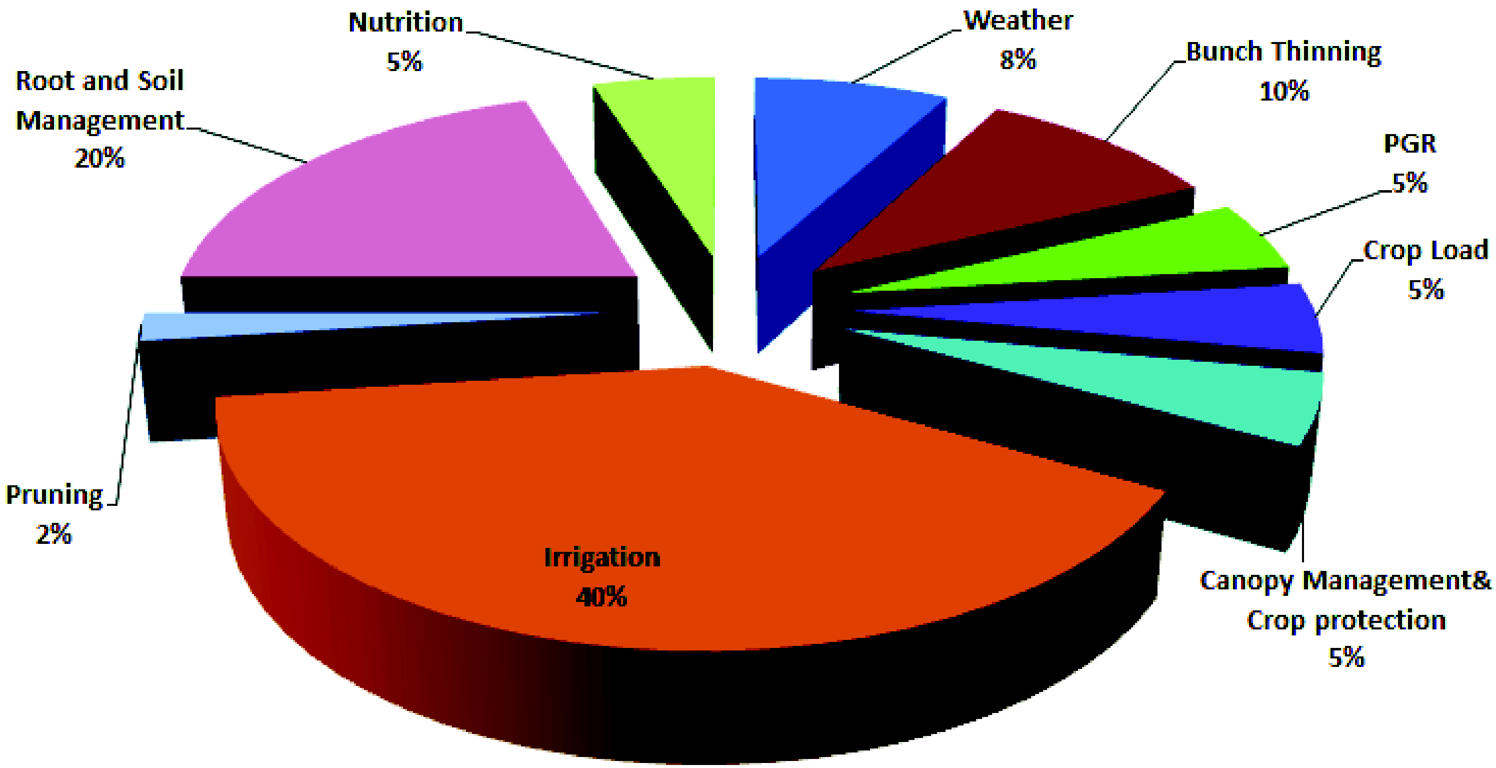
Source: Uses and customs of the Chilean industry

Condition Problems

- Definition:
  - Dynamic and progressive post harvest problems, which tend to change faster or evolving, during the commercial shelf life of the table grape like:
    - Decay
    - Shattering
    - Internal breakdown
    - Water berry
    - Bleaching (SO2 damage)
    - Hair line and or berry split
    - Loos skin
- Associate more directly to a cooling, packing materials and post harvest mismanagement of the fruit.
- Mot of the problems are trigger at the field level and enhance during the cooling and handling till the market.

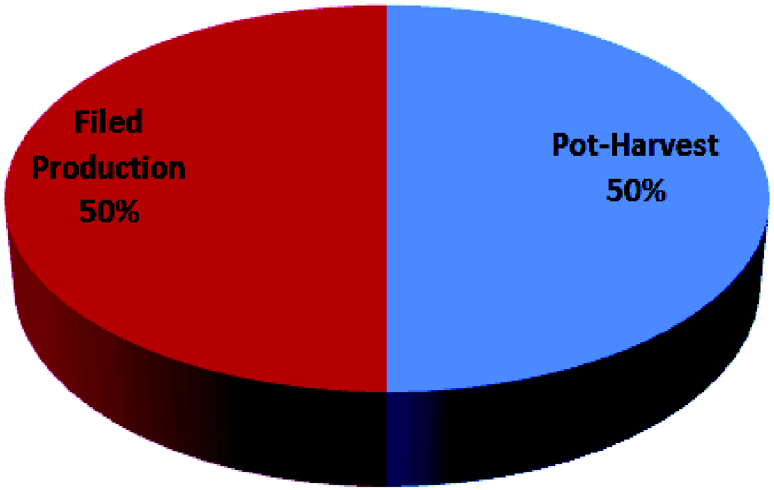
Source: Uses and customs of the Chilean industry

Agronomic Impact of some Techniques in a well manage Export Table Grape production unit



Source: Modified from D. Lujbetic 2004

Impact or share between filed production and Post harvest in successful arrivals of Table Grape



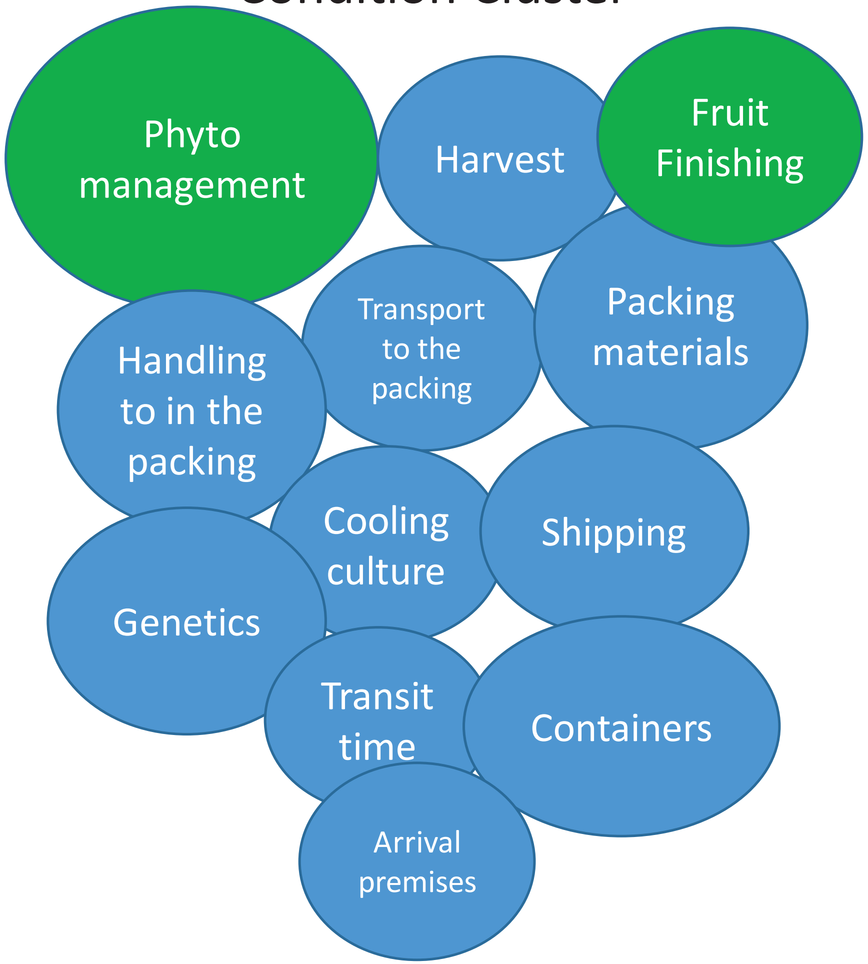
Source: O. Salgado 2011

Main South African Arrival Issues

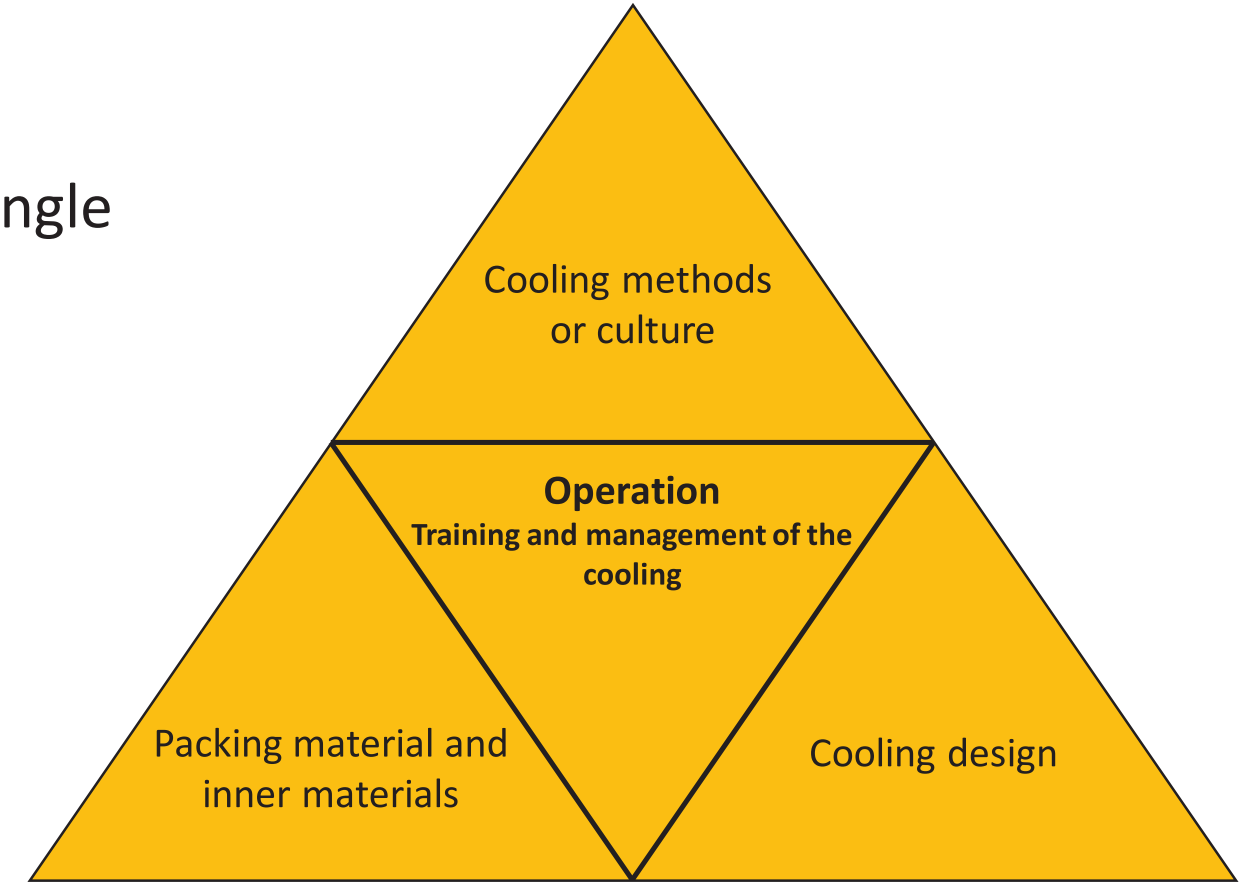
- Decay:
  - Bad fungal management, mainly at bloom
  - Clusters to tight
  - Wounds
  - Cooling issues (condensation)
- Split berries
  - Rough harvest
  - Condensation (Cooling)
  - Rough packing operation
  - Wrong packing materials
- Dray stem/rachis
  - Genetics
  - Pressure Vapor Deficit (RH%) cooling culture
- Shattering
- Bruising

Order doesn't means prevalence

Condition Cluster



Cooling Triangle

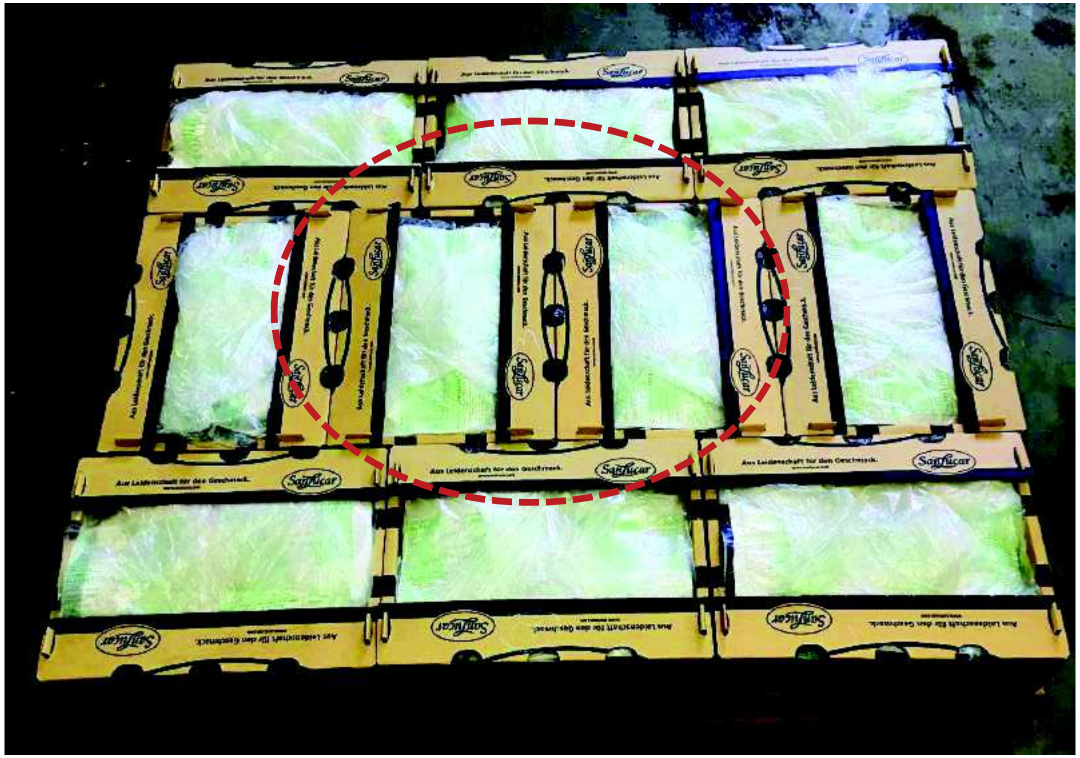


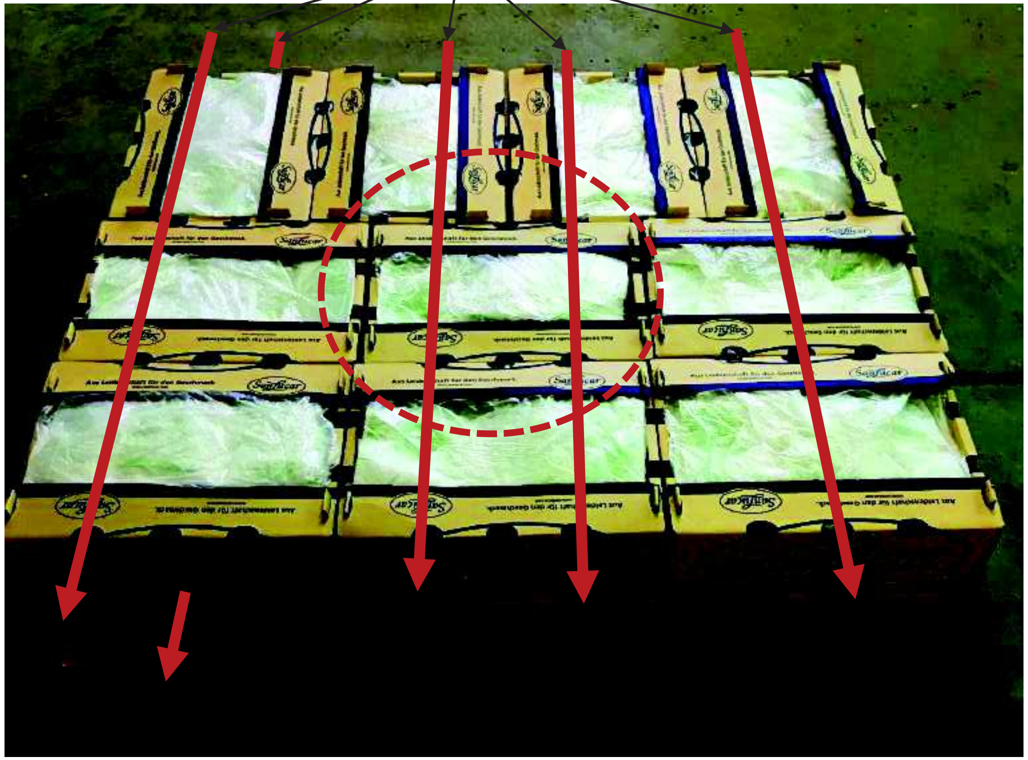
Source: adapted by O. Salgado from L. Luchsinger 2015

South African
Fast pre-cooler in Paarl
2017

South African
Fast pre-cooler in Paarl
2017

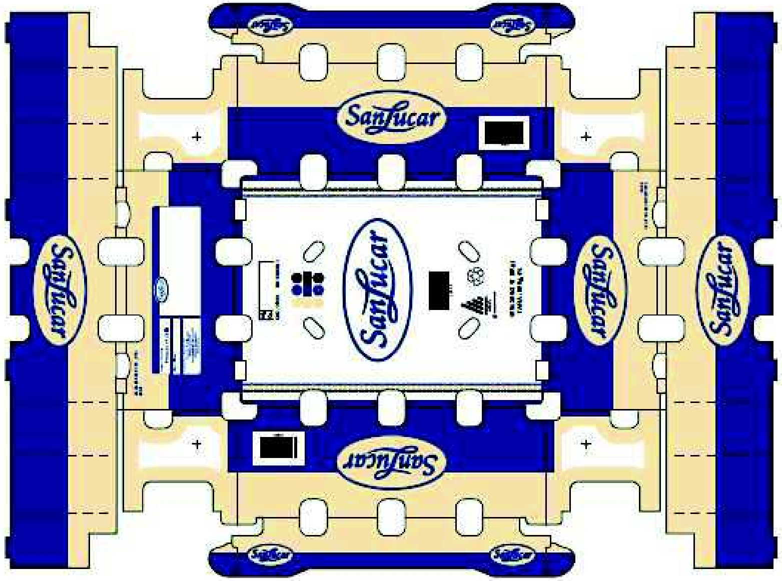
Cross ventilation form the top and the bottom of the box

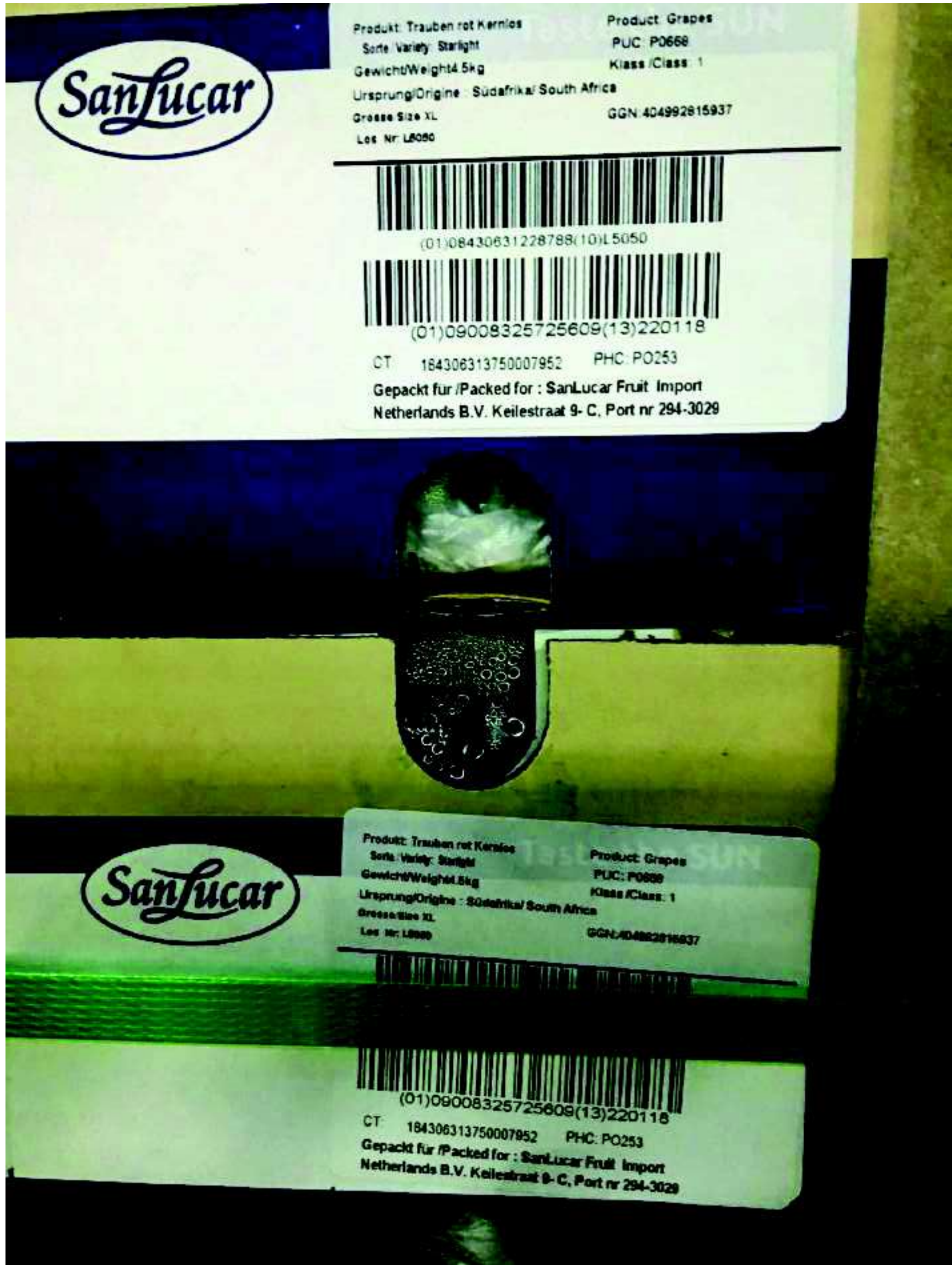




Standard two blind boxes format

Keep using for all market the one blind box staking format




SanLucar
Produkt: Trauben rot Kernlos
Sorte /Variety: Starlight
Gewicht/Weight4.5kg
Ursprung/Origine : Südafrika/ South Africa
Grosse Size XL
Product: Grapes
PUC: P0668
Klass /Class: 1
GGN 404992815937
(01)08430631228788(10)L5050
(01)09008325725609(13)220118
CT 184306313750007952
PHC: PO253
Gepackt fur /Packed for : SanLucar Fruit Import
Netherlands B.V. Keilestraat 9- C, Port nr 294-3029


SanLucar


950X650
HDPE
2
9


0.3 vent.
www.suragra.com
HDPE
HDPE


750X550 mm.
CASTILLOS
03%
750X550 mm.

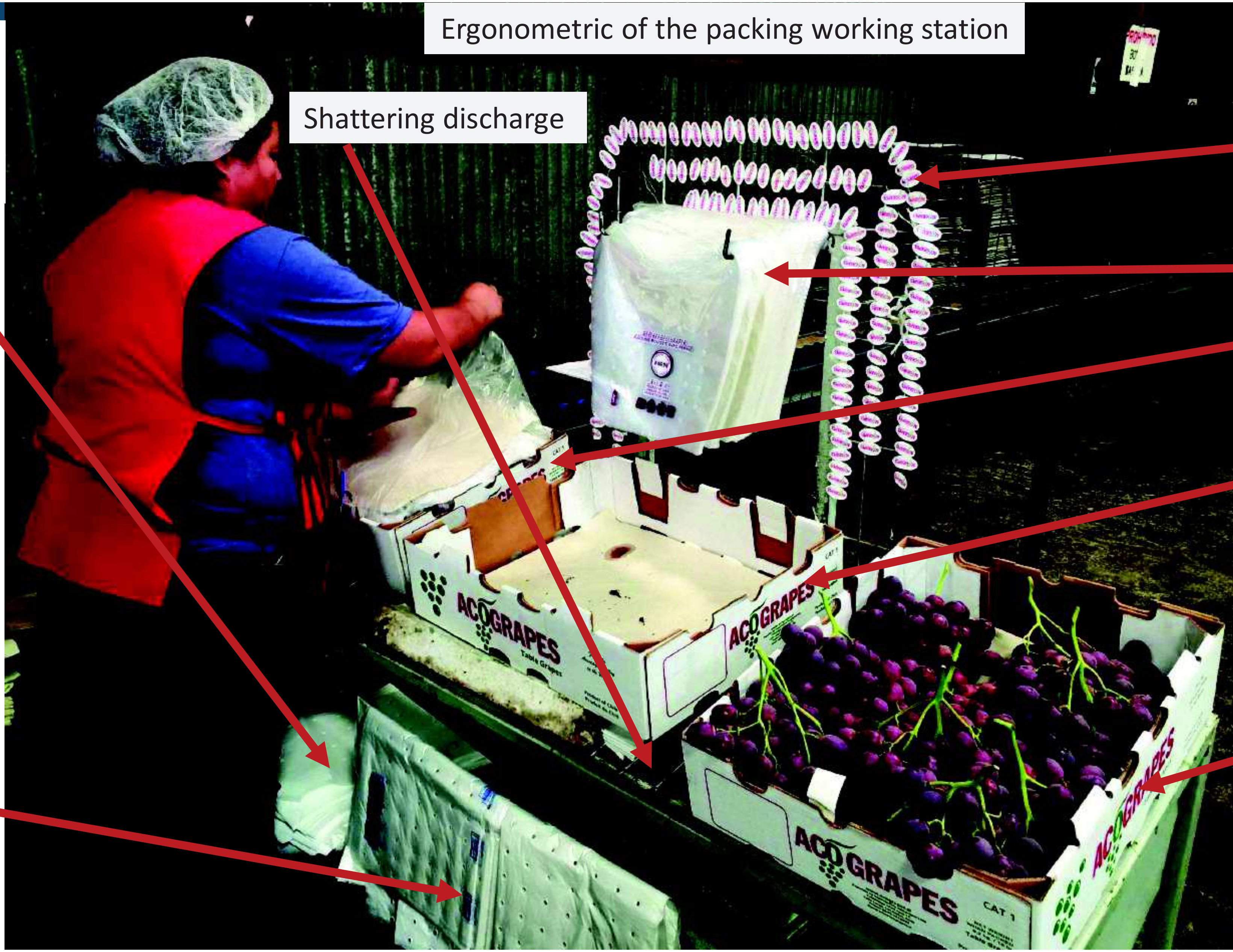
		Minor		Minor
Ventilated area %	Speed of the fast pre cooling	Dehydration in the FPC	Dehydration transit	General Dehydration
0				
0,3				
0,6				
0,9				
1,3				
2.0				
2,7				
Mayor	Mayor		Mayor	

Source: Adapted from L. Luchsinger 2017

All packers right – hand

Flow of the work from left to right

Ergonometric of the packing working station



Butter paper, SO2 pads and absorb sheets (inner packing materials)

Plastic liners

Stickers for sealing the liner

Rack holder of Poly bags

Packed box

Next box to be pack

Box with the clean fruit to be pack

Right – hand
packer and
flow of the work
In this format the packers are packing completely the box, till closing it.

SanLucar

Look after the ratio Cleaners and Packers, line can not stop and accumulate fruit because the bottle neck are the scale and the packers (speed / number?), we loos fruit condition if we delay the packing process as within the liner the VPD (vapour Pressure Deficit) are lower, so less dehydration and the SO2 start acting as a Fungicide / Fungistatic.

If the flow is not good enough workers tend to start putting on bunch on top of the other, loosing the bloom / natural wax, increasing shattering, cap-stems detachment and sometime causing micro damages on the cuticle.

In correct way to handle the bunches, hand and fingers ac not enter in to the bunch.



Correct way to clean a bunch, like this the bloom are not remove and you avid de de-barnching

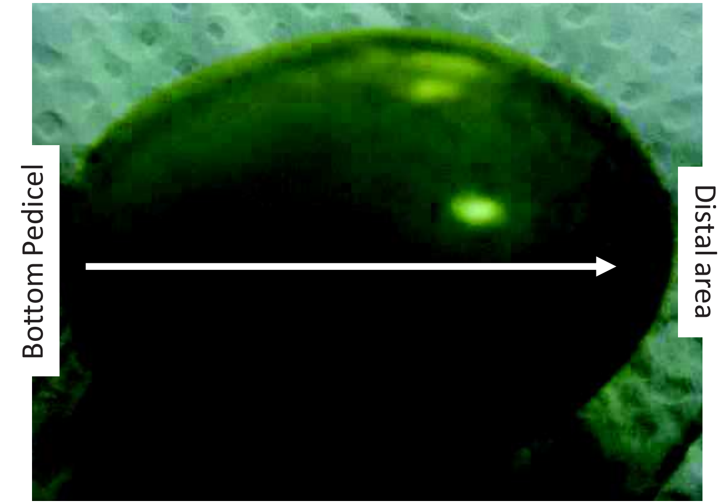
SanLucar

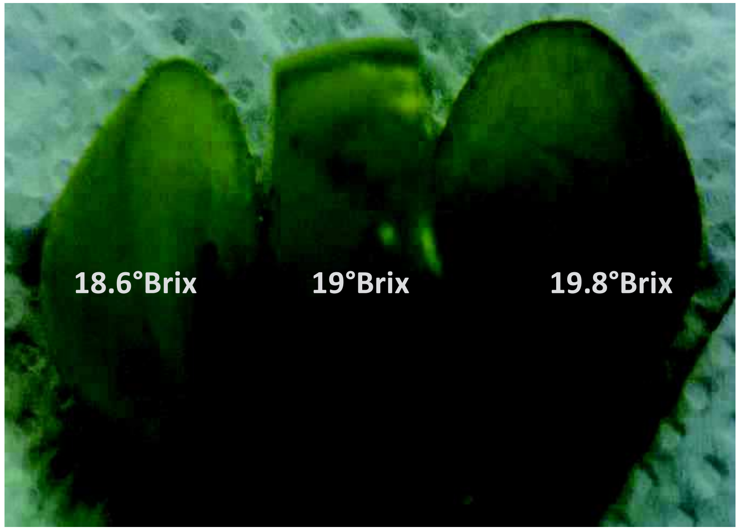
Fruit with good presentation after Chris implement the proper handling of the fruit, just one cluster shining as the wax was remove it, for China (and all the SEA market) this is a quality defect, for other markets are not that important, but bloom / wax is our first natural line of defence against post harvest diseases.

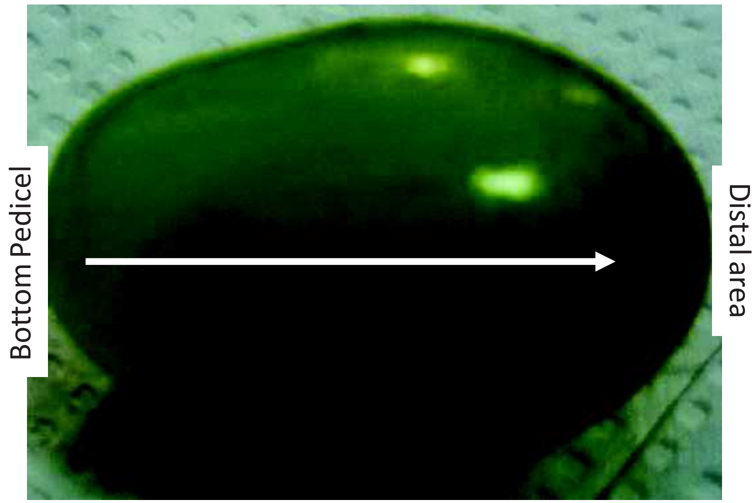
SanLucar

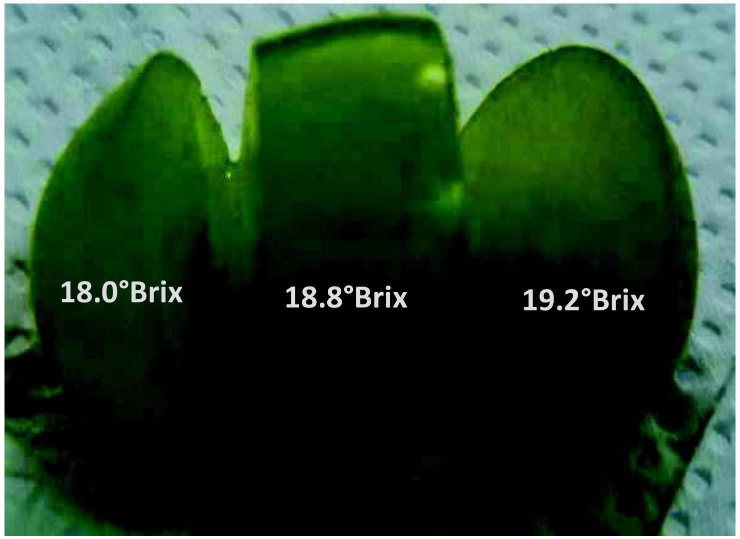
Seal the liner using a proper SL sticker, easy to handle than a solitape

……..y los niveles de ácidos?









Fuente: A. Barbosa, Coopexvale, Petrolina 2014

Sour Rot complex

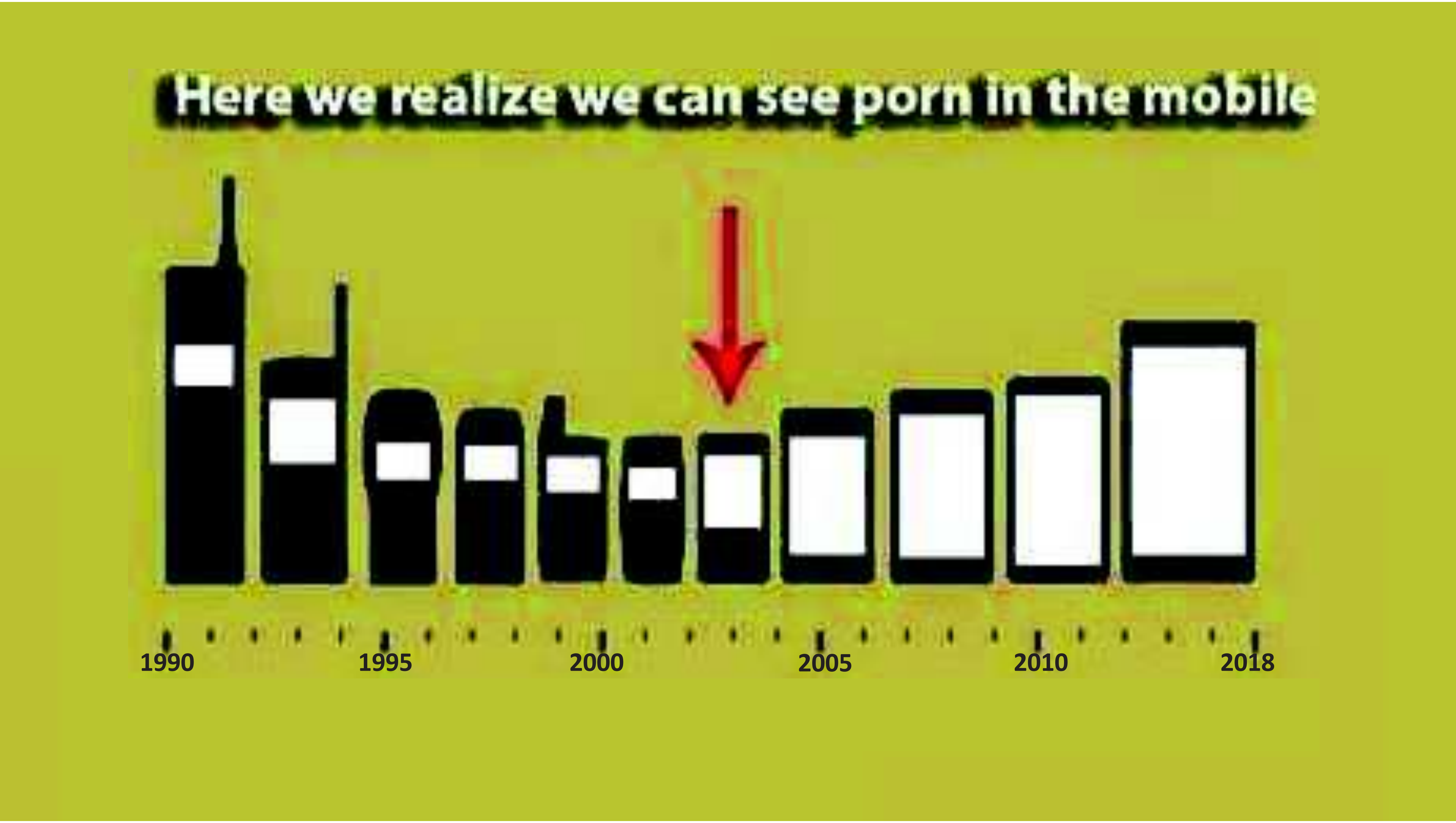
Fungus associated to a Sour Rot Complex in Chile		
Effect of 0ºC and the risk of developed growth of each fungus		
Spices	Minimum Temperature in 0ºC	Risk of decay
Botrytis cinerea	0	High
Rhizopus stoloniffer	>5	Nil
Aspergillus niger	>7	Nil
Penicillium sp.	0	Moderate
Cladosporium herbarum	0	Moderate
Alternaria alternata	0	Moderate
Yeasts	>5	Low to Nil

Note: fungus did not growth at average temperature they grow at a single point of temperature, so the average temperature at the cooling is a wrong concept!!!

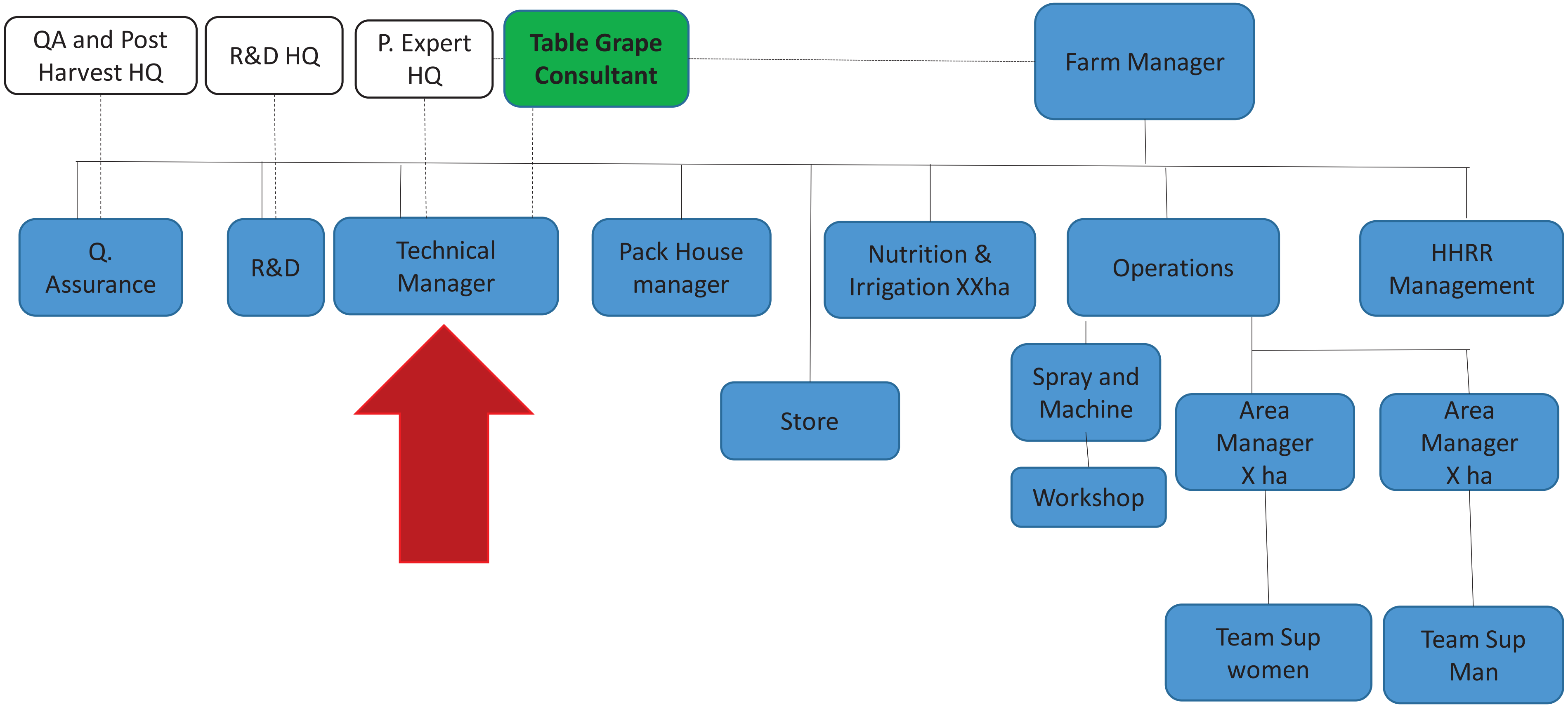
Source : Latorre et al 2002

Too busy for innovation????

We are very very busy as you can see, please not now!!!!


Here we realize we can see porn in the mobile
1990
1995
2000
2005
2010
2018

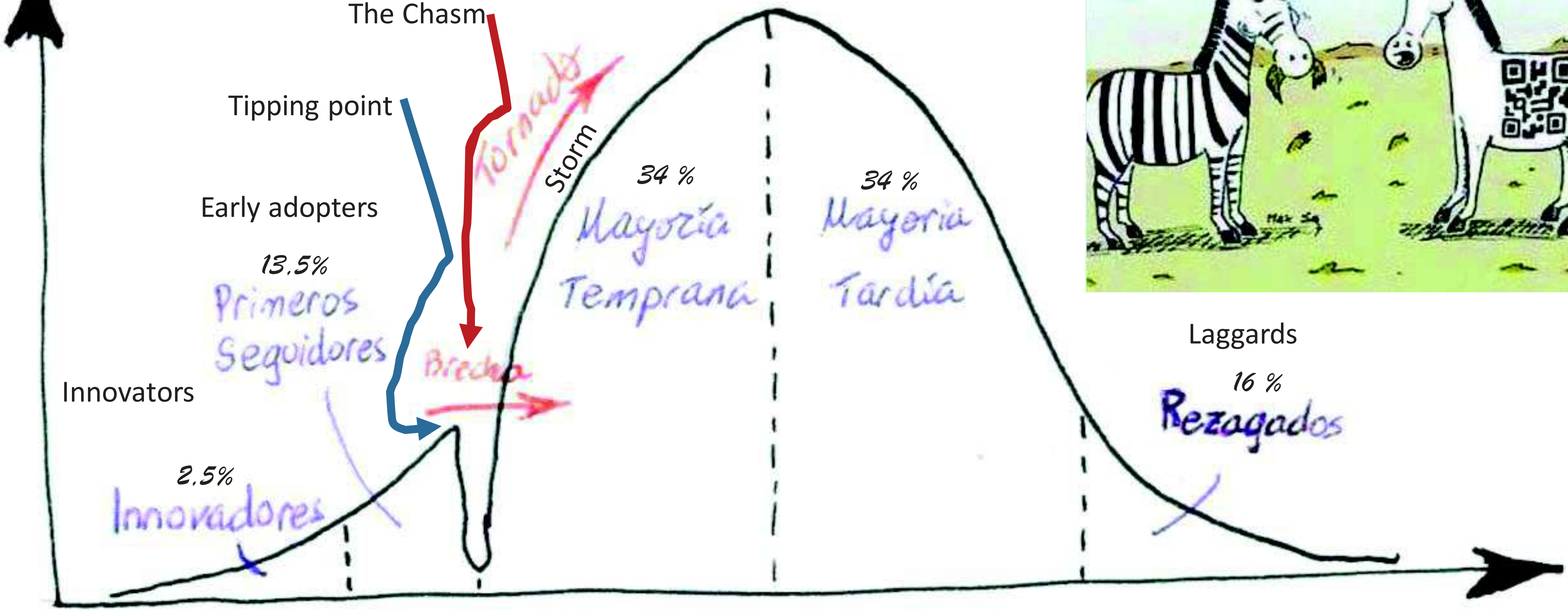
Farm Management

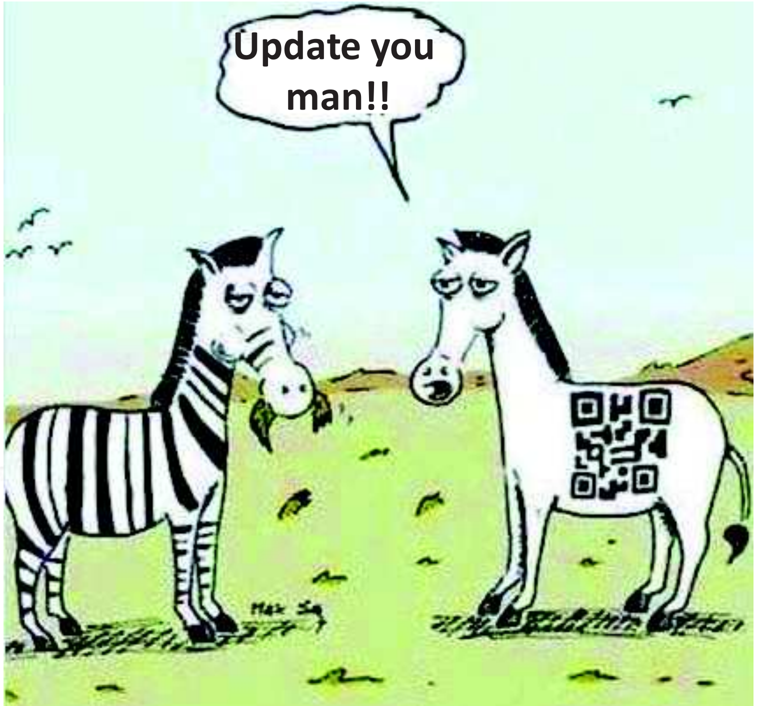


Metro Supermarket
in Berlin

https://qz.com/704100/a-startup-that-wants-to-end-world-hunger-is-starting-with-a-tiny-indoor-vertical-farm/

Diffusion of innovations Theory





Everett Rogers (1962)

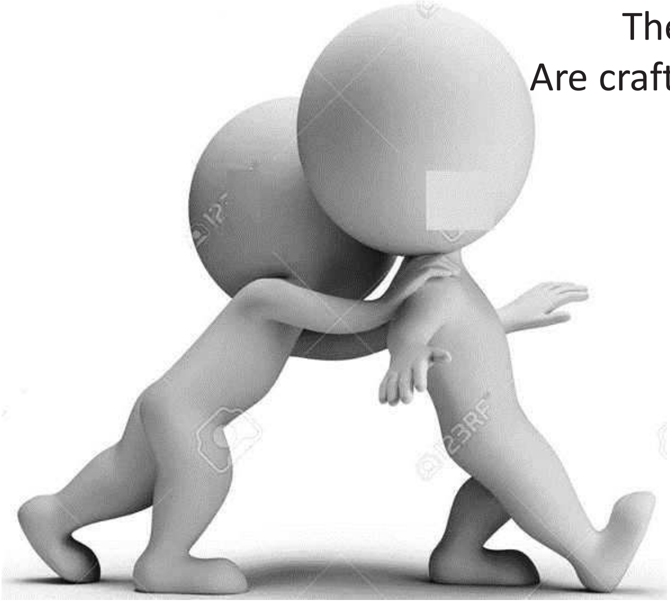
Are you concern about the competitors? Means that the competition wins, we have to know then before they become your competitors

I want to compete or differentiate ? I am selling Grape or a product ?

R&D how much I invest?

“ I have the best quality in the world” ………!!!!! Well this is a stone-age argument

I have 40 years of experience…….sorry chaps,
Wrong you have 1 years of experience which you repeat 39!!!



The Painter Artist drama ………his masterpiece is unique and is impossible to replicate it
Are craft-makers but we should became designers and mass producers (gestión/mejora continua)

Active Inertia: make always the same, maybe we are the best in our field but………..
Kodak, Olivetti , Motorola……………Taxis /UBER
…………Collaborative Economy ………..re-invent or reengineering (Donald Sull)

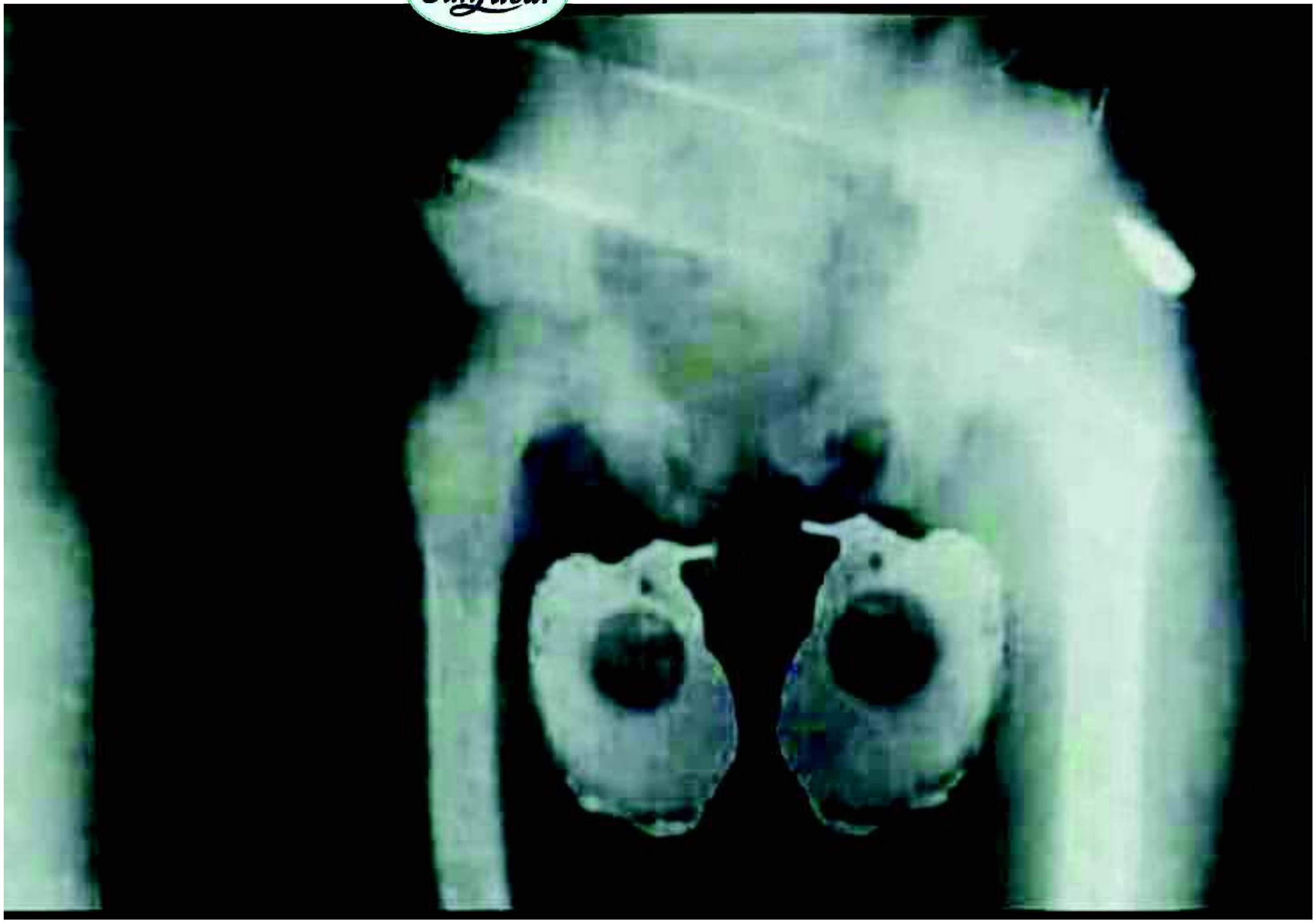
“Blue Ocean Strategy” from Chan Kim y Renee Mauborgne

" The wise man gets more advantages for his enemies than the fool for his friends “

Benjamin Franklin

- If you can not be strong, but you don't know how to be weak, you will be defeated
- The inhabitants are the basis of a country, food is the happiness of the people. The prince must respect this fact and sober, as well as austere in his public spending
- If you know others and you know yourself, not in a hundred battles you will be in danger; If you do not know others, but you know yourself, you will lose a battle and gain another; If you do not know others or know yourself, you will be in danger in every battle.

Murcia / Spain Last week



Italy

- Skilled labour availability
- Land and vineyard development cost
- Climate (rain and high temperatures)
- Active ingredients availability for pest and disease control (MRL issue)
- Control of volume production (excess of fruit on the market - Farmers not doing crop adjustment)
- Market access
- Lack in public research and education
- Farm fragmentation
- Production not quality driven (commodity market)
- Logistic and infrastructure (lack of ports and easier transport system)
- Business oriented management

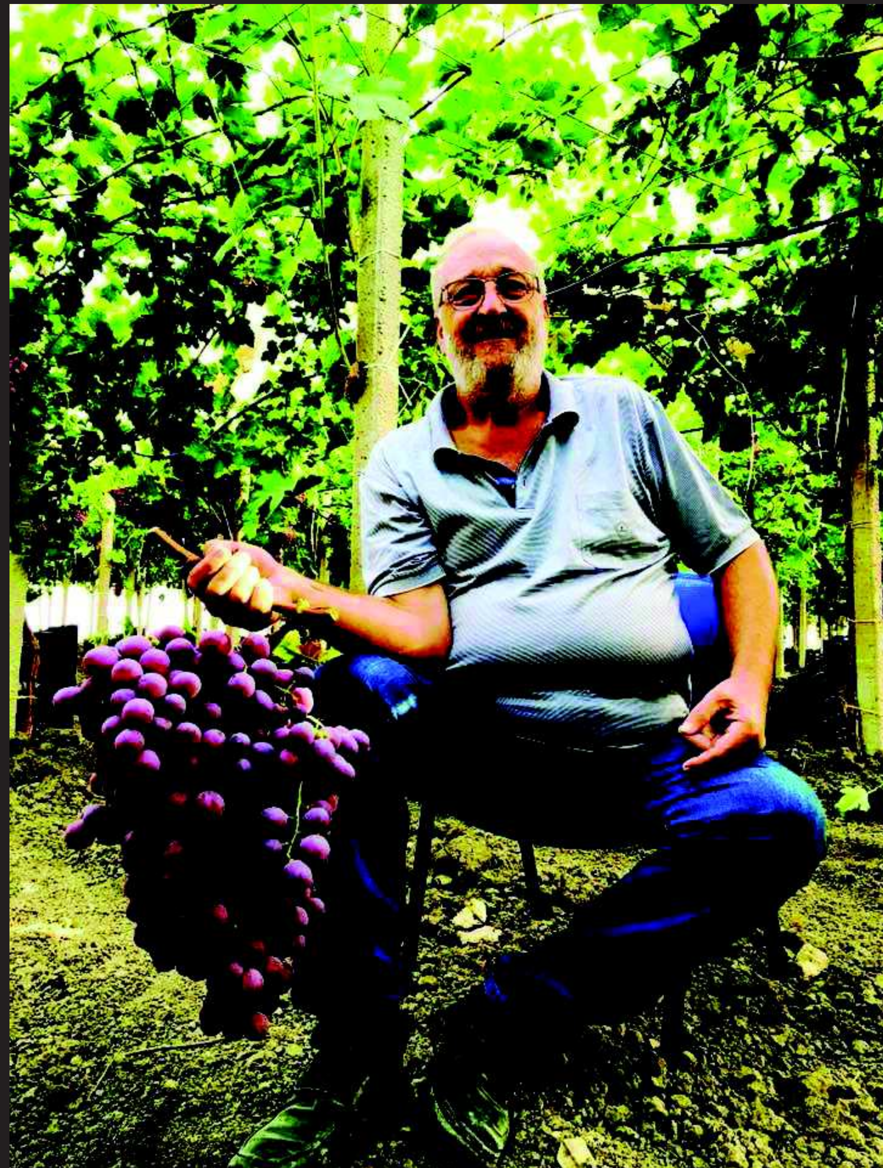
Michele Melillo m.melillo@graper.it

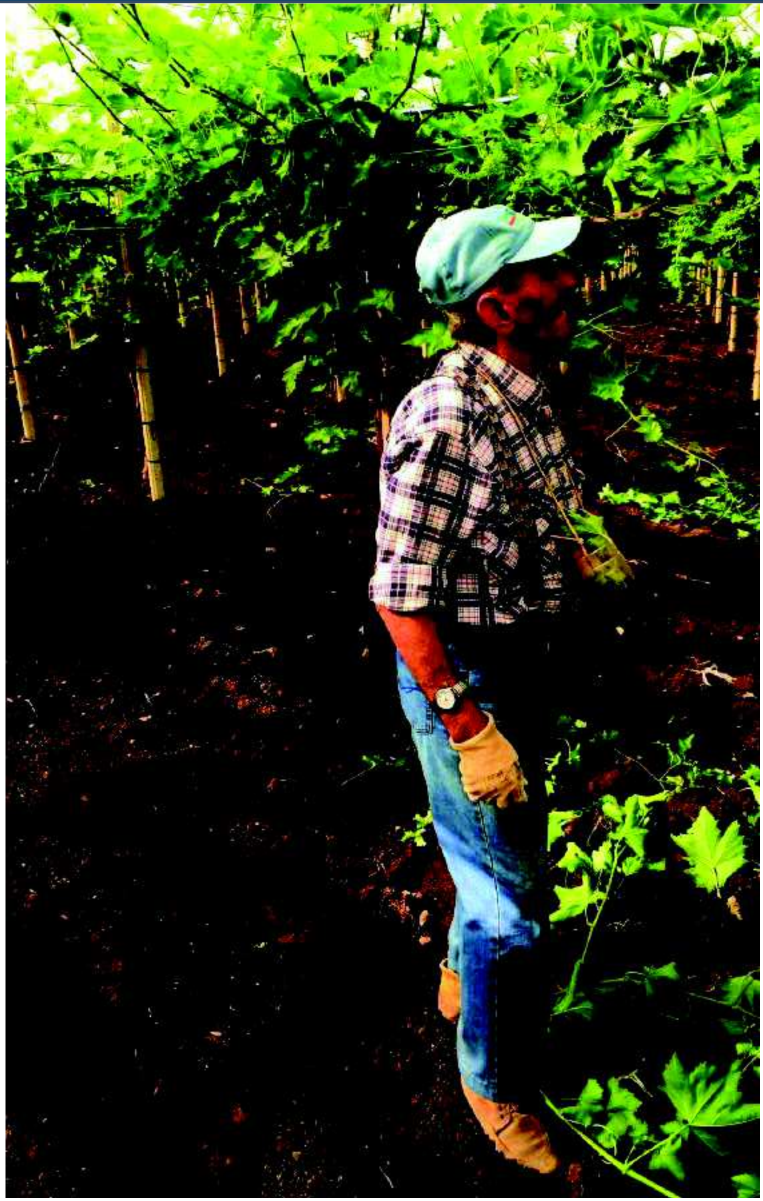
- Varietal choice for new plantings. What plant????
- Not knowledge of Intellectual Property(IP)!
- Laborers (not enough legal workers)
- Hi production costs
- Global competition specially on very early and late varieties (lower selling price)
- Weather changing (Majority of vineyards in Apulia are now grown under plastic from bud burst to harvest to protect from rains already in spring)
- More frequent physiological disorders in Italia variety and consequent problems (cracking first of all)
- Traditional production areas with no virgin soils available. “Very tired soils”.
- Not connection between growers and market (growers don't know what's happen in the market)..
- ……. I‘ let you know!!

Pietro Scafidi pscafidi@ifg.world

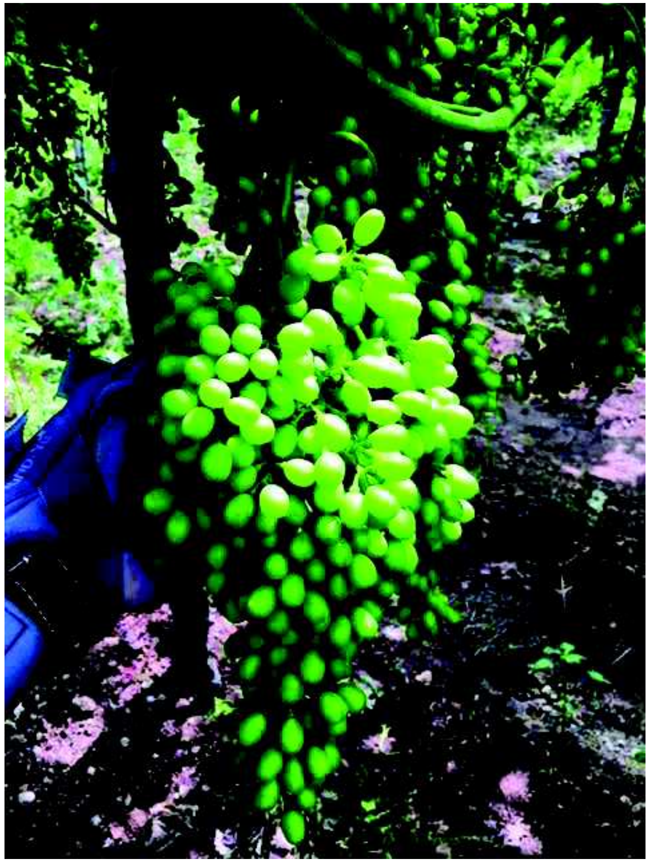
Taste the sun

Il Signore Vita produttore
della Sicilia, **grappolo**
di Red Globe
Agosto 2018





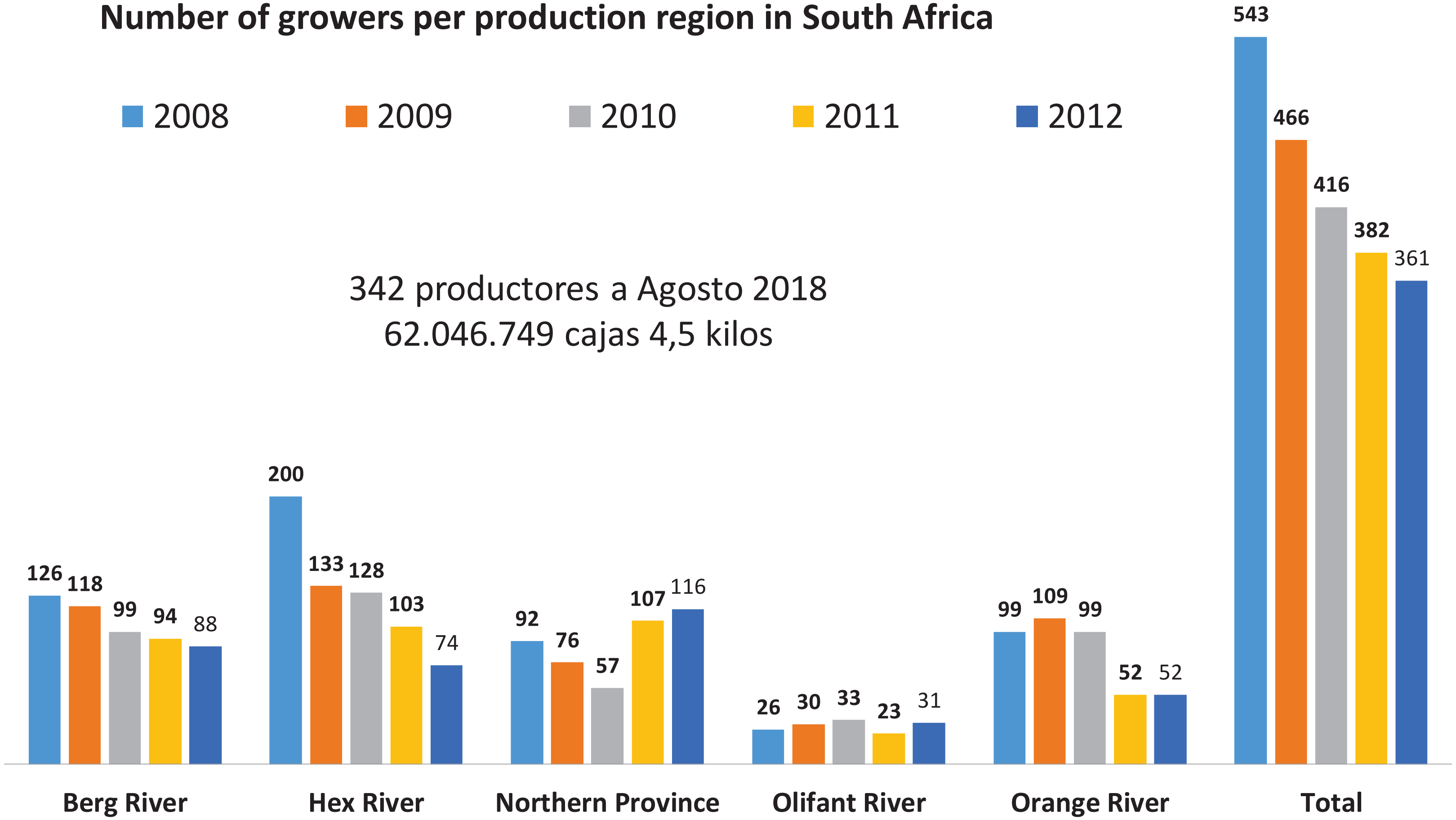
Productor Italiano 87 años al 2016…………………….



Scarlotta 22 Mayo 2018

Scarlotta 3 de Agosto 2018 Bari

Number of growers per production region in South Africa



342 productores a Agosto 2018
62.046.749 cajas 4,5 kilos

Fuente: SATIG 2014 update till week 14 PPECB 2013

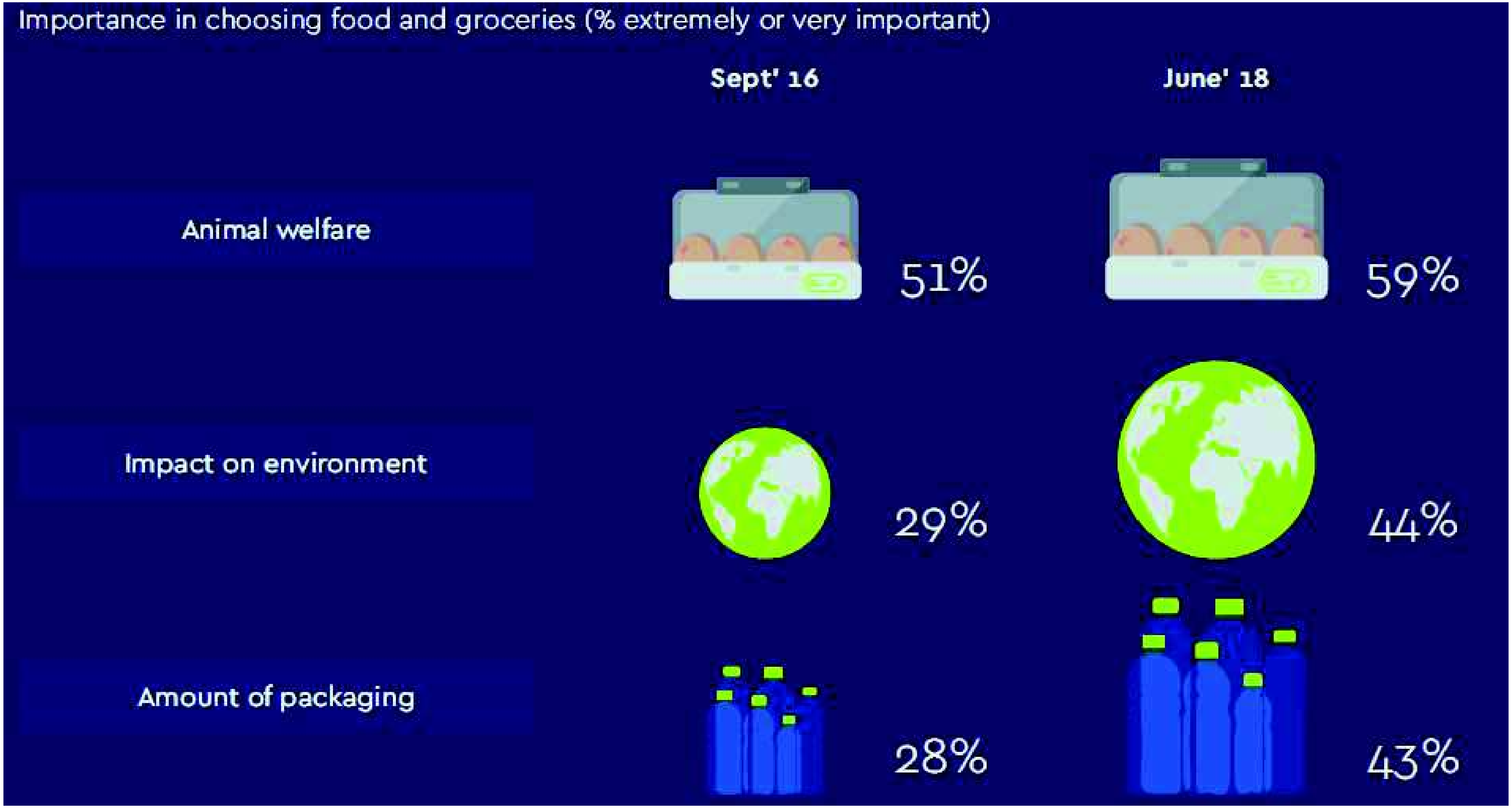
Exportaciones Sudafricanas en Cajas de 4,5 kilos todos los mercados

REGION	2017/2018	2016/2017	% CHANGE
	(4.5 KG) EQUIVALENT CARTONS		
NORTHERN PROVINCES	6 828 762	5 537 784	23,31%
ORANGE RIVER	19 015 641	20 532 515	-7,39%
OLIFANTS RIVER	2 802 436	3 968 073	-29,38%
BERG RIVER	13 052 616	15 426 175	-15,39%
HEX RIVER	20 365 296	22 110 612	-7,89%
ALL REGIONS	**62 064 749**	**67 575 160**	**-8,15%**

El potencial pudo ser 70 -75.000.000 de cajas de 4,5 kilos o
39 – 37.000.000 cajas de 8,2 kilos

Fuente: SATI 2018

Taste the sun



Source : IGD British Snapshots , Shoppers Vista, June 2018

74%

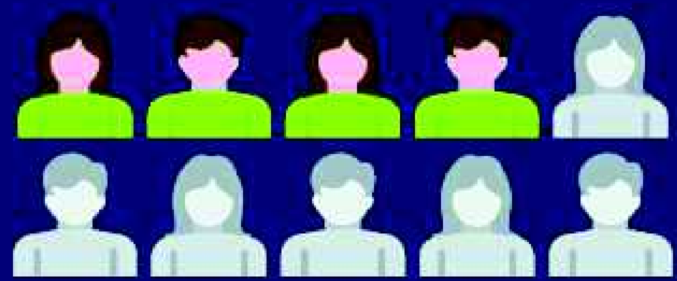
have become more aware of the environmental impact of plastic packaging over the last 12 months

54%

say recent TV shows (e.g. Blue Planet) have inspired them to make changes to support the environment

60%

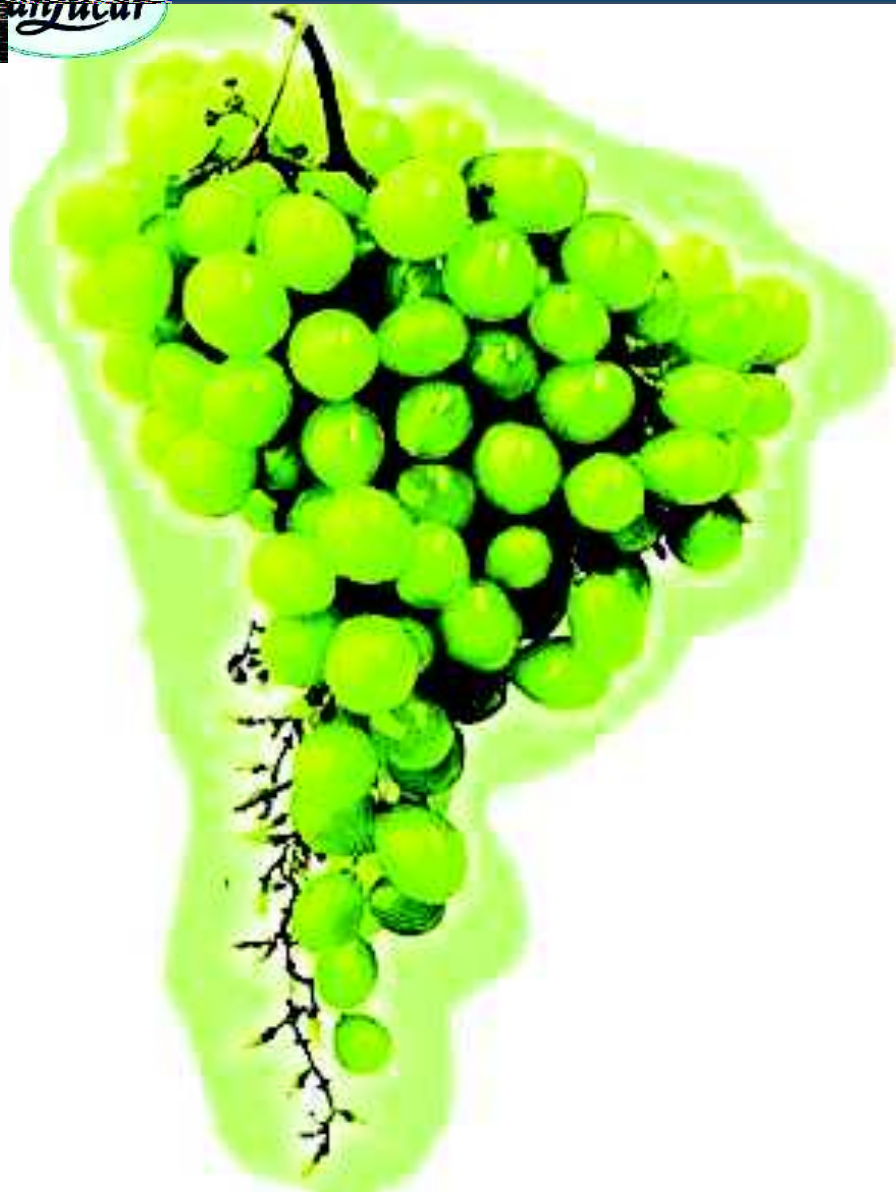
of under 35s say concern for the environment will be more important to them in the next 5-10 years



38%

of influencer shoppers say they will always buy environmentally sustainable food and grocery products in the future

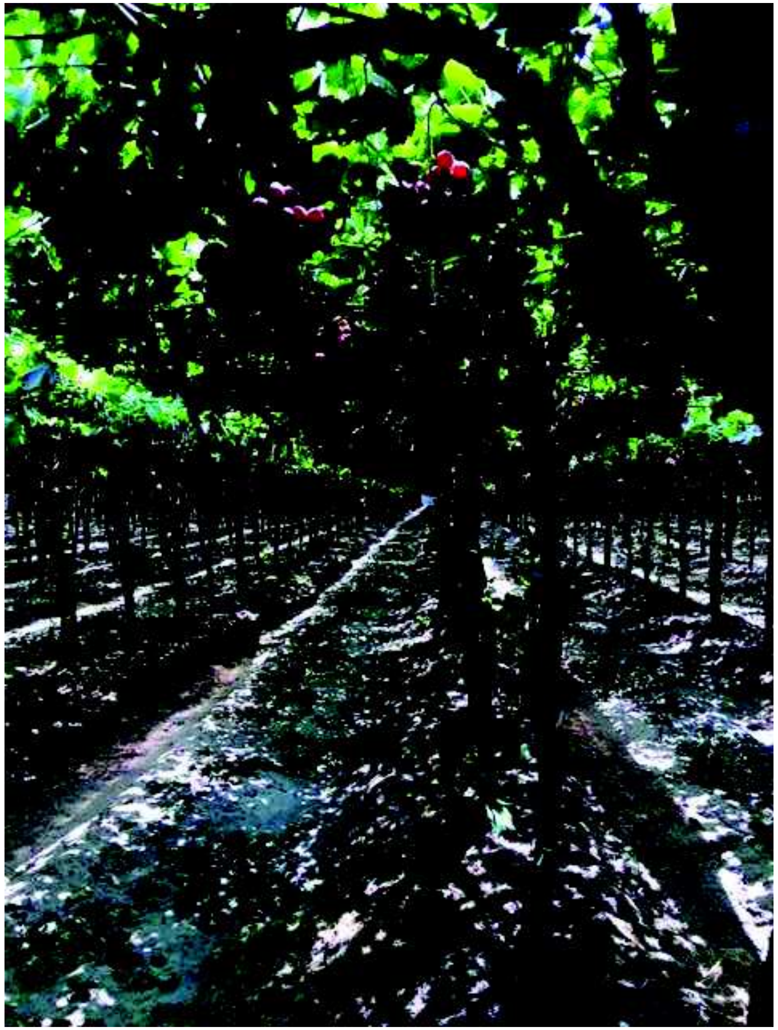
Source : IGD British Snapshots , Shoppers Vista, June 2018



- The best Marketer is the technician which design the fruit which are demanded by the client of my client.
- Knows your competitors
- New forms of business……………………….
- Renew or die, you are not obliged to be alive


When everything
goes wrong...


...remember
that it
could be
still worse!!!



Star Light a una semana de cosecha Egipto 15 de Mayo 2018

27th of July 2018

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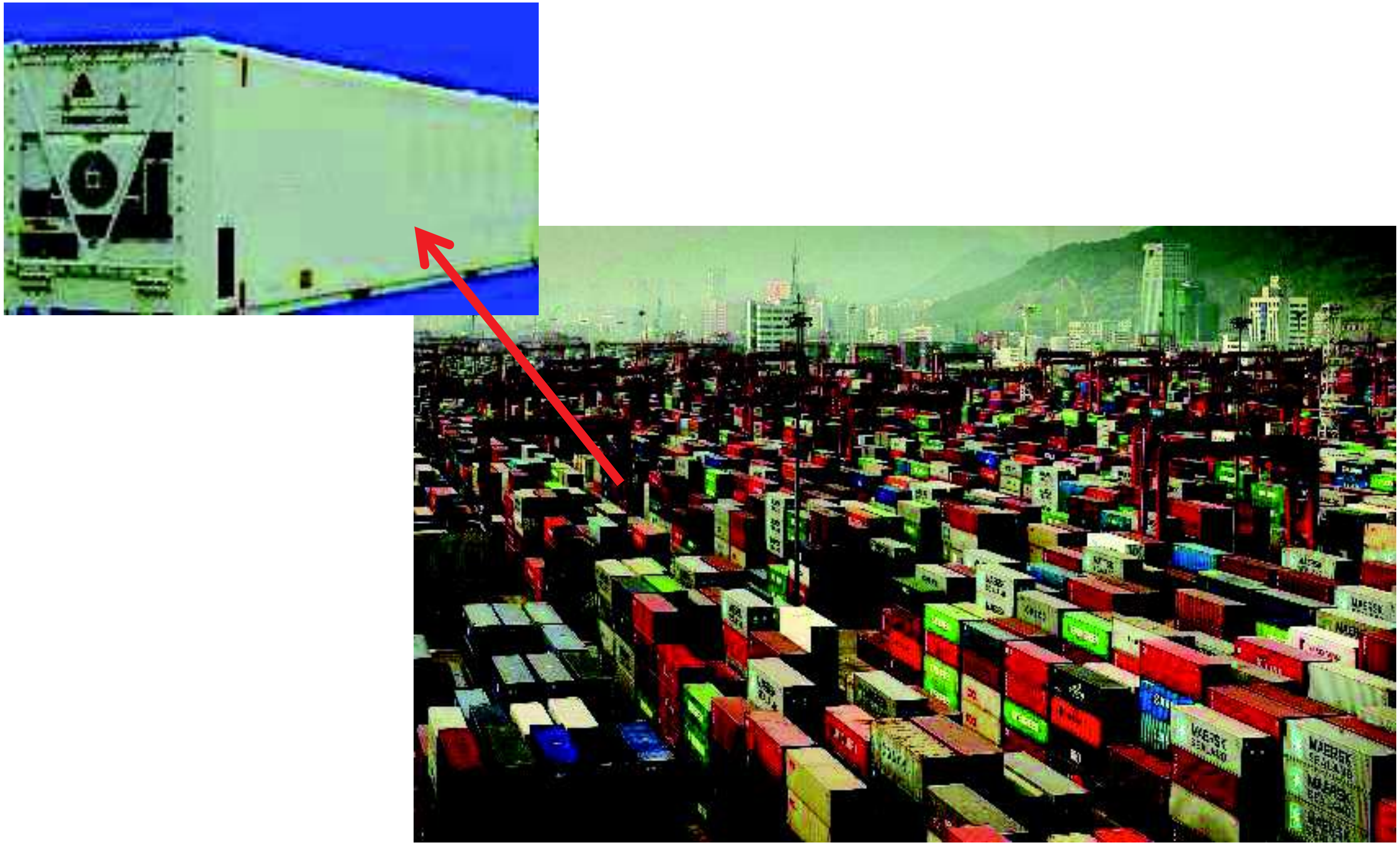
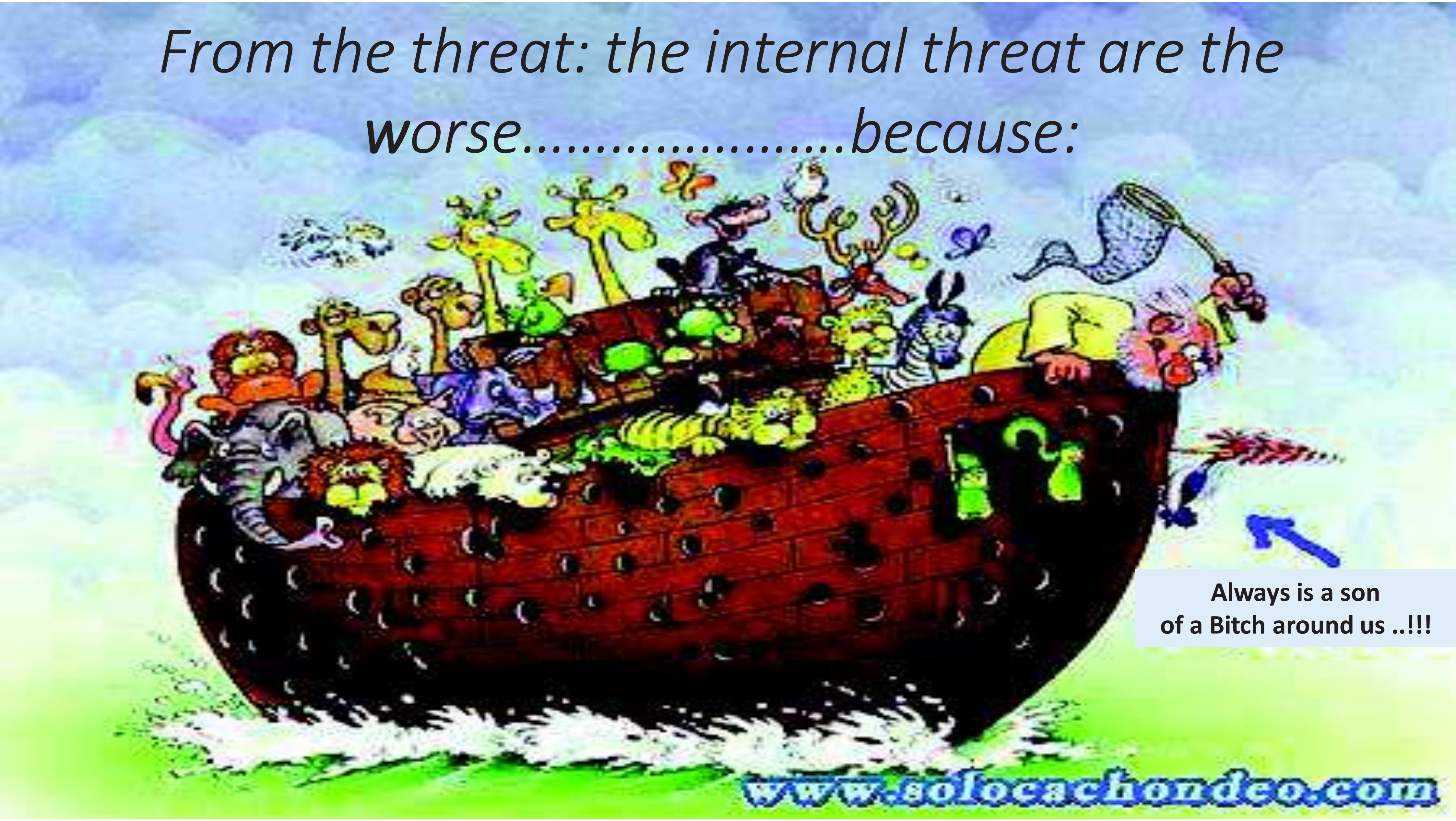
ZZZZZZZZZ
SanLucar


MAERSK



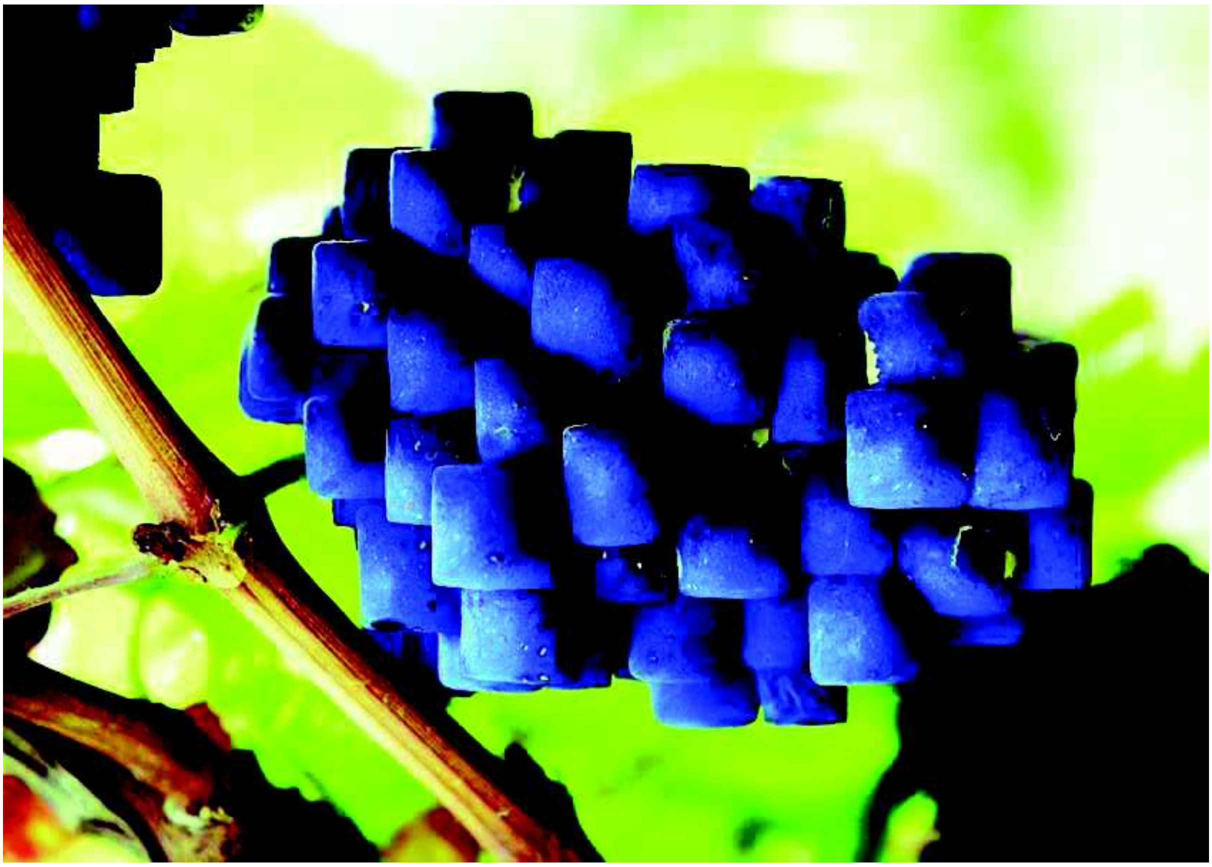
*From the threat: the internal threat are the **w**orse……………………because:*

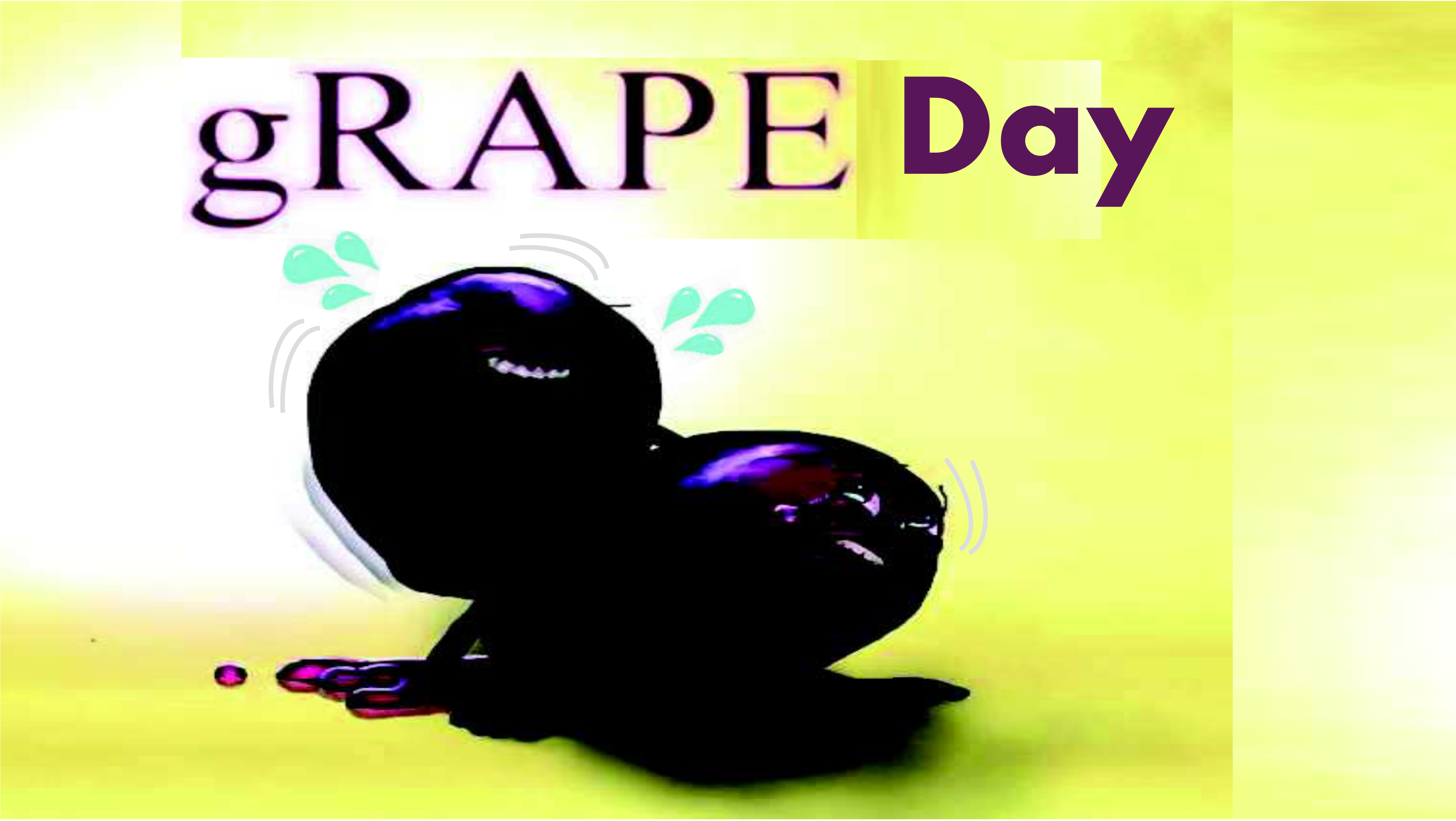


Always is a son of a Bitch around us ..!!!

Do not relax, every body have the right to be in business, but no body are obliged to remind in business, remember our business is changing very fast and what is changings even faster and faster than our business, is the speed of the change…….

Oscar Salgado

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