



**ASIA FRUIT
LOGISTICA**

MARKETING & CONSUMERS : Varietal innovation in table grapes and how this will enhance the consumer experience in Asia



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- Managing Director at the SNFL Group
- 20 Years in the Group, first at AM FRESH UK followed by SNFL
- 18 Years experience in the Table Grape Industry



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1990 **A TRAILBLAZING PARTNERSHIP**

Timothy Sheehan, breeder of the Sheehan varieties was working to develop new and improved table grape varieties when he crossed paths with SNFL's Chairman, Duncan Macintyre and Alvaro Muñoz, CEO of AM FRESH.



1998 **ASSEMBLING AN AMBITIOUS PROGRAM**

Tim accumulated a unique collection of around 200 diverse parent varieties combining flavor, crispness and large berry sizes then went on to establish a successful program with over 300,000 crosses. Prompting a company growth spurt worldwide with plantings in California, Arizona and Spain.



2007 **SHEEHAN BECOMES A BREEDING POWERHOUSE**

Sheehan's new seedless varieties now successfully recognized as Ivory™, Allison™, Great Green™, Timco™, Timpson™, Krissy™ and Melody™ begin to be planted around the world with large planting expansions following in the next few years from the Sheehan California Collection.



2009 **SHEEHAN LEAVES A LEGACY**

Sadly, Tim passed away in 2009 but his legacy continued on and Sheehan Genetics, now wholly owned by SNFL GROUP developed and launched a collection of 20 patented table grape varieties.



2015 **A BRAND-NEW BEGINNING**

SNFL established a brand-new breeding program "Grape Genesis" flourishing under the direction of Dr. Juan Carreño with the clear objective of building on Tim Sheehan's legacy and to provide the highly dynamic table grape industry with even better and more consumer-focused varieties. Varieties with enhanced disease tolerance to reduce pesticide inputs, varieties with naturally high levels of antioxidants for a healthier diet, varieties with more interesting and distinctive flavors for greater customer appeal



2022 **SPEARHEADING GRAPE INNOVATION**

Dr. Juan Carreño and his team have already produced around 300,000 hybrids which have been screened in our DNA labs and test blocks, resulting in a collection of 50 advanced selections now undergoing evaluation in our trial sites around the world. The first new varieties emerging from this program will be launched in 2021/22.

INNOVATION CENTERS & OWNED TRIAL SITES IN KEY MARKETS

TO ENSURE GLOBAL RELEVANCE



VARIETAL DEVELOPMENT



ABOUT US



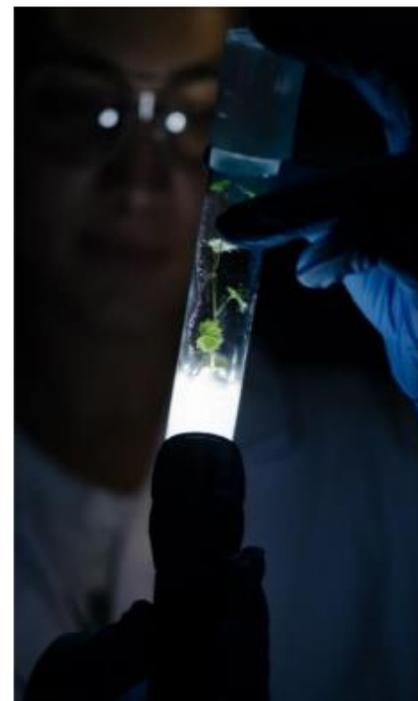
20 NEW TABLE GRAPE
VARIETIES RELEASED



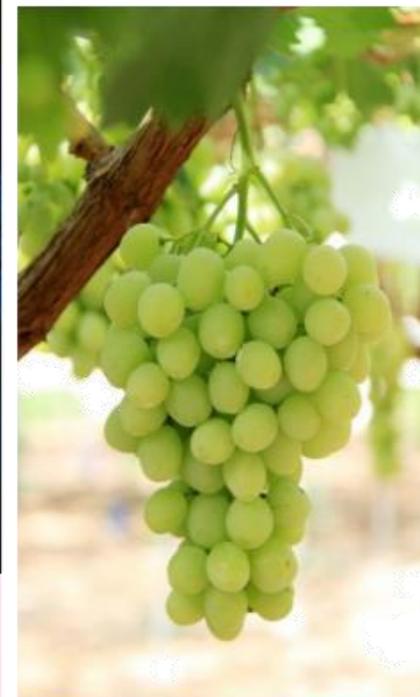
+30.000 HA LICENSED
WORLDWIDE



PLANTINGS IN 18
COUNTRIES



+ 400 INDIVIDUAL
GROWERS LICENSED



+ 70 MILLION
CARTONS PRODUCED
EVERY YEAR





OUR GLOBAL NETWORK OF GROWERS REQUIRE FARMING PROTOCOLS FOR A VARIETY OF LOCAL AGRONOMIC CONDITIONS.





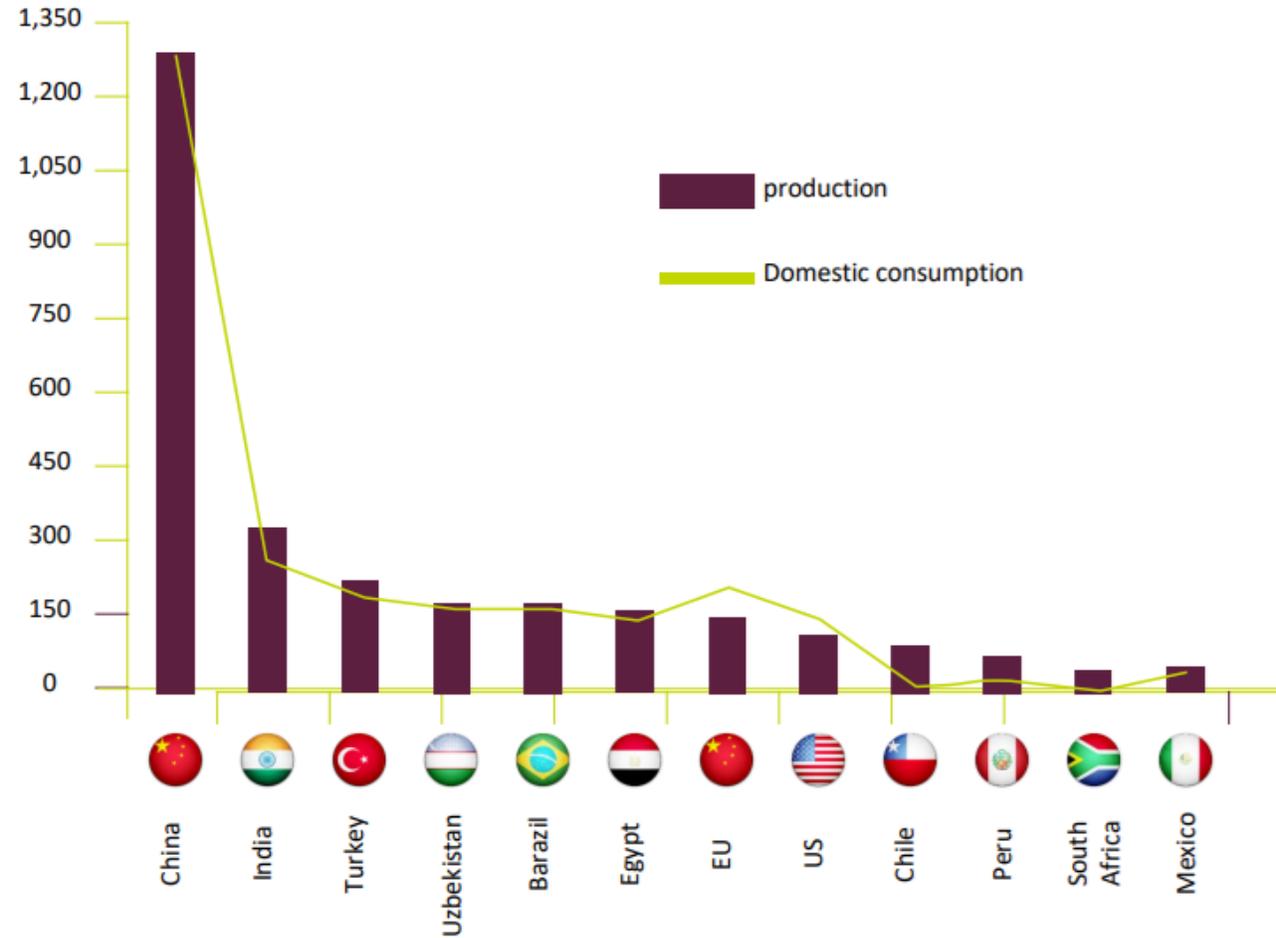
CURRENT STATE OF THE GLOBAL TABLE GRAPE CATEGORY AND MARKET TRENDS

ASIA



FRESH GRAPE PRODUCTION AND CONSUMPTION BY COUNTRY, 2021-22

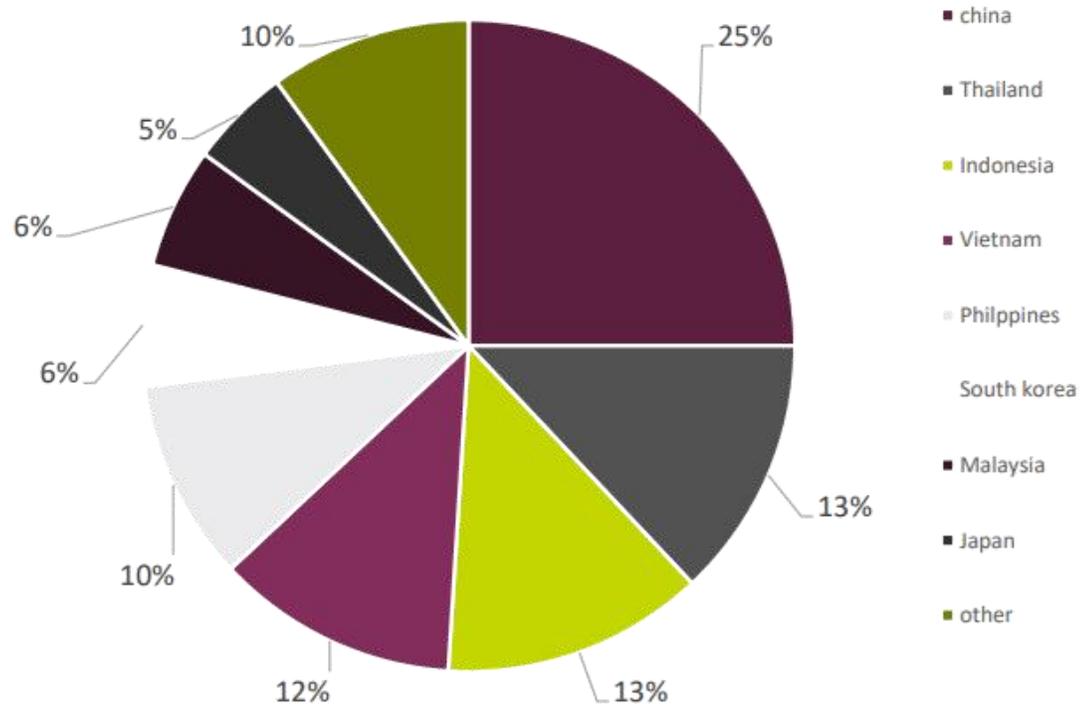
**CHINA
SIGNIFICANTLY
LEADS TABLE GRAPE
CONSUMPTION
AND PRODUCTION
WORLDWIDE.**



Source: Californian Table Grape Association

CURRENT STATE OF THE GLOBAL TABLE GRAPE CATEGORY

China represents 25% of the total imports into Asia.



- China produces and consumes more grapes than rest of the territories together
- Consumers are **switching into seedless grape** varieties and are becoming more sophisticated
- China **consumes majority** of the grapes produced in China
- An represents a **25%** of the total grapes imported to Asia
- Thailand, Indonesia and Vietnam** represents **38%** of table grapes imports.



THERE IS AN OPPORTUNITY TO FURTHER GROW GRAPES CONSUMPTION IN CHINA,

ESPECIALLY AMONG GENERATIONS X, Y AND Z.

Grapes are underrepresented in the fruit basket with **only 29% OF CHINESE CONSUMERS BUYING GRAPES ON A WEEKLY BASE.**

There are opportunities to increase category consumption with **Gen X, Y and Z**

QUALITY is the most important factor in deciding which grape to buy, meaning **FLAVOUR AND THE FIRMNESS** of the grapes.

When shoppers are asked about satisfaction with the category, **88% stated** to be very satisfied or satisfied with the grapes they can find in store. Even though they would like to see **FRESHER AND MORE FLAVOURFUL PRODUCTS** on top of a wider assortment

There is a slightly negative health connotation with grapes as almost **90% CHINESE STATED THEY WILL EAT MORE GRAPES IF THESE WERE HEALTHIER**, driven by the high sugar content found in grapes.



RED COLOUR STILL DOMINATES THE MARKET

RED COLOUR IS STILL THE #1 PREFERRED COLOUR AMONG 70% OF CHINESE GRAPES SHOPPERS, as it gives people a **festive feeling** and it arose the **desire to eat**; they are linked to sweeter flavours.

BLACK IS SECOND IN PREFERENCE as it has a sense of **fullness**, it's the dark pearl!

The dark colours, red and black, are associated to more nutrients and anthocyanin which are **good for health**.

Younger generations are more open to try new colours as **green and mixed packs**; the influence of the colour to their lives is extremely important, even for fruit.



Our Main Varieties for Asia





Ivory™

Early season variety with an excellent sweet neutral flavour. **Very crunchy large uniform berries and bunch size.** Great fertility. Very strong vine vigour. One of our most demanded grapes !



Timpson™

Superb mid-season white variety, with high productivity and an evident muscat flavour. **Tim Sheehan's favorite green!**



Great Green™

Mid-to-late season *Great Green* variety with uniform large ellipsoidal berries. **Extra crunchy!**

Harvest Calendar



IVORY	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
PERU	•										•	•
CHILE	•	•										
SOUTH AFRICA	•	•										
AUSTRALIA	•	•										



GREAT GREEN	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
CHILE		•	•									
PERU	•											•
AUSTRALIA		•										



TIMPSON	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
PERU	•										•	•
SOUTH AFRICA	•	•										
CHILE	•	•	•									
AUSTRALIA	•	•										



Carlita™

Mid to late-season bright red variety with an intense sweet, neutral flavor, and a crisp texture. **Very large and loose bunches** of good sized and unique shape berries. **High productivity.**



Allison™

Very late season red variety with **large crisp flavoured berries** allowing extending the red grapes season. Large bunch size with **high productivity**. Very good condition after 6 weeks in storage trial.



Melody™

Mid season deep black variety with an intense **sweetened flavour and crunchy large oval-like berries**. Naturally achieved full colour, high fertility and very strong vine vigour.

Harvest Calendar



CARLITA	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
SOUTH AFRICA	•	•										
AUSTRALIA		•	•									



ALLISON	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
SOUTH AFRICA	•	•	•									•
CHILE			•	•								
PERU	•	•										•
AUSTRALIA			•	•	•							



MELODY	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
PERU											•	•
SOUTH AFRICA	•	•	•									
CHILE		•	•	•	•							
AUSTRALIA		•	•									



BREEDING PROGRAM GRAPE GENESIS

WHERE THE FUTURE BEGINS

VARIETAL INNOVATION, BREEDING FOR CONSUMERS TRAITS, & SUSTAINABILITY



BREEDING OBJECTIVES

MAINSTREAM



Extending consumers **seasonal windows** through high quality **late and early varieties**, providing greater availability to consumers.

+FLAVOUR



Creating **new and exciting flavour profiles** that surprise and delight consumers, maximizing the reach of consumption through new potential targets..

DISEASE RESISTANCE



Converting **natural disease tolerance and resistance (mainly powdery mildew and downy mildew)** table grape varieties in the new paradigm, resulting in much reduced agrochemicals inputs and residues in human body.

HEALTH



Developing healthier categories of table grapes, with **increased antioxidant content**, increasing growers and consumers acceptance and interest for healthy snackable produce.



Thank
You!

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