



**SEKOYA®**

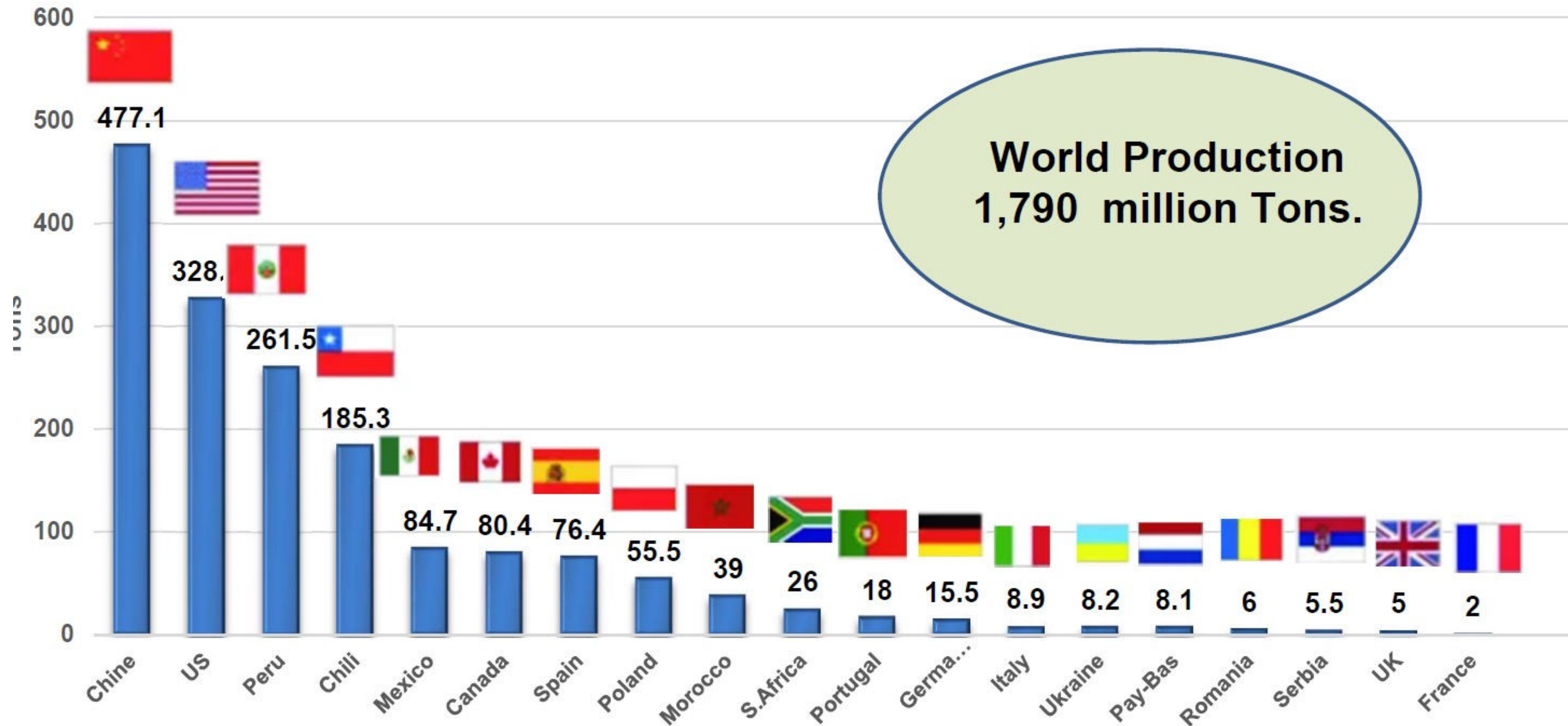
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**Blue Sky for Blueberries!**

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# Globalization Production

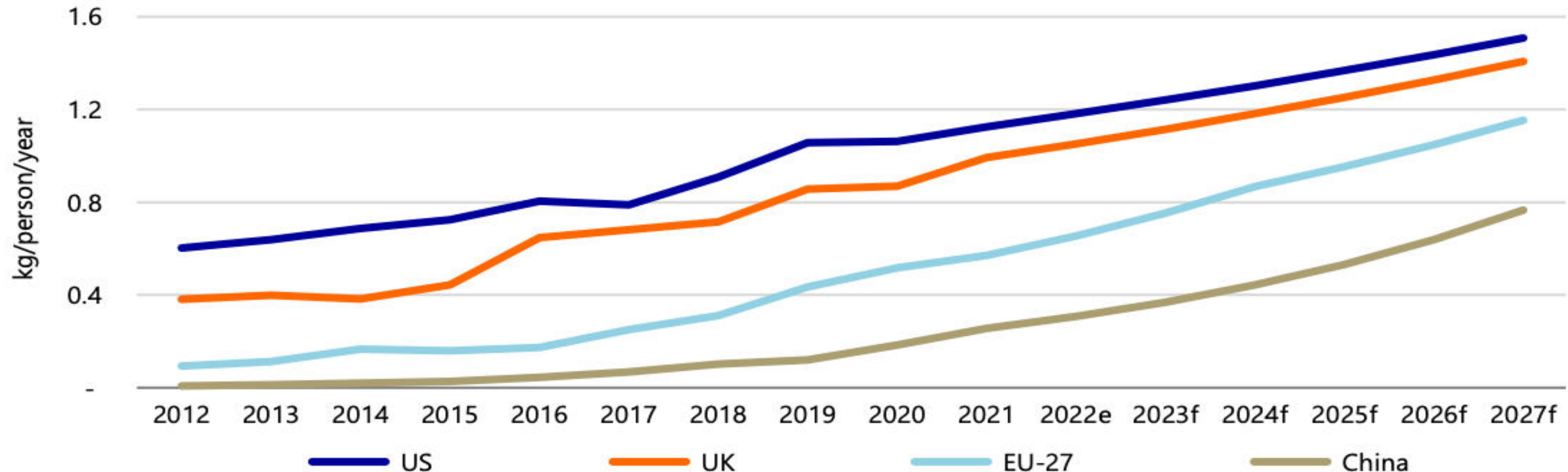


**IBO 2022**

# Growing Fruit Need



Figure 1: Per capita availability of fresh blueberries in selected markets, 2012-2027f



Source: Trade Map, USDA, Rabobank estimates 2022

## 2023:

- Global consumption **doubled** last 5 years to 2,000 million tons

## In 5-7 years:

- Global consumption will **double again**

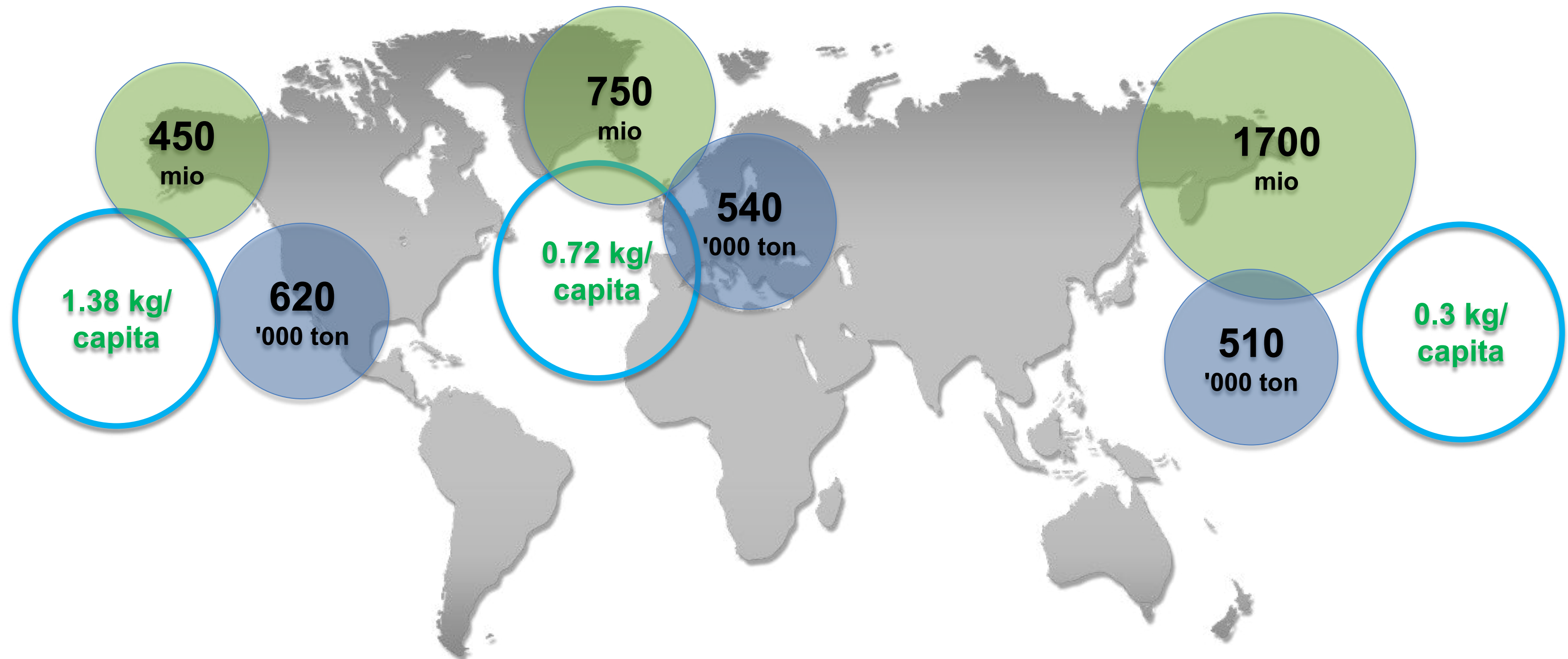


Canada has a 3,1 kg pc consumption or more than double of the USA



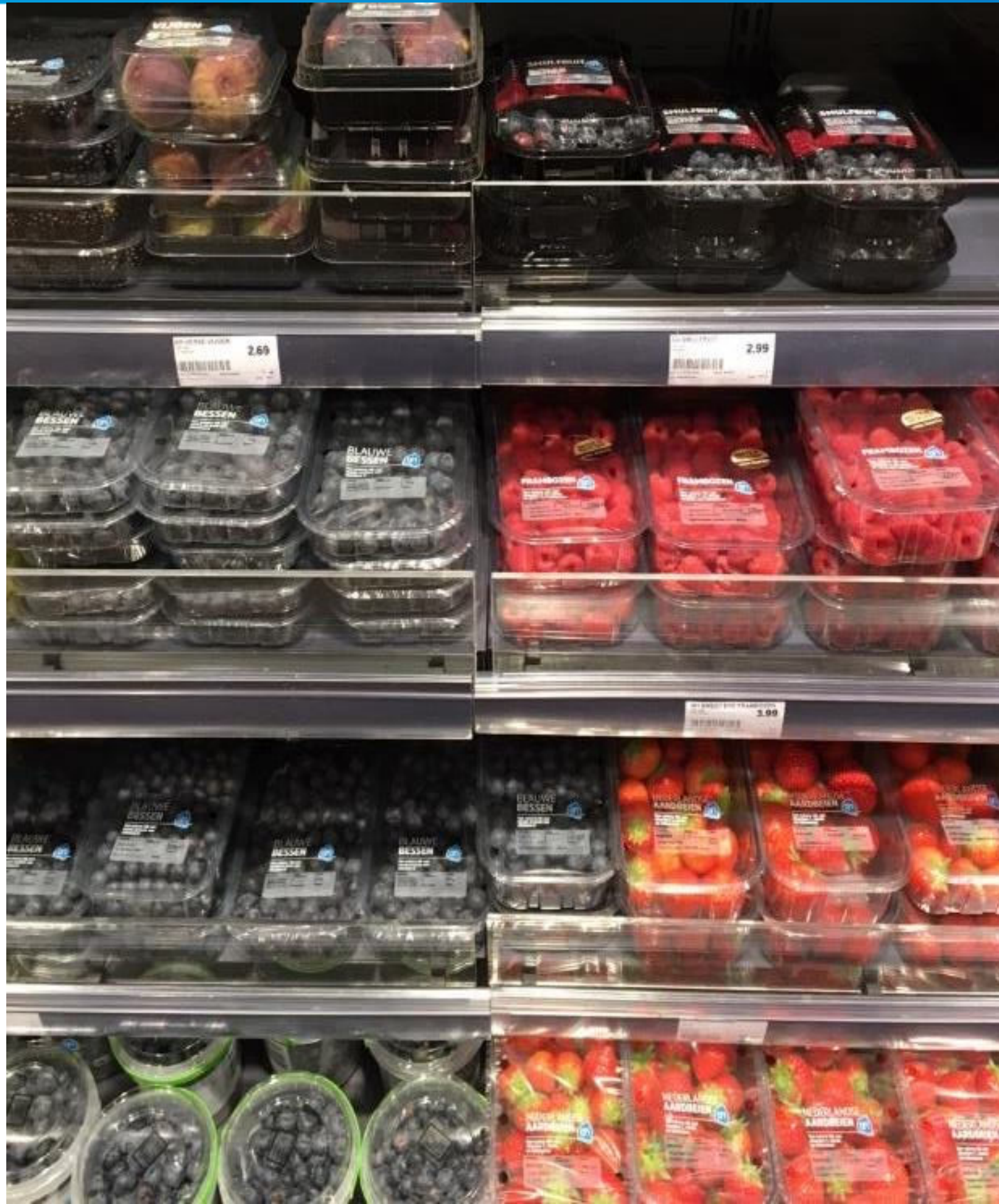
# Blueberry Consumption

## Consumption vs. Population 2022

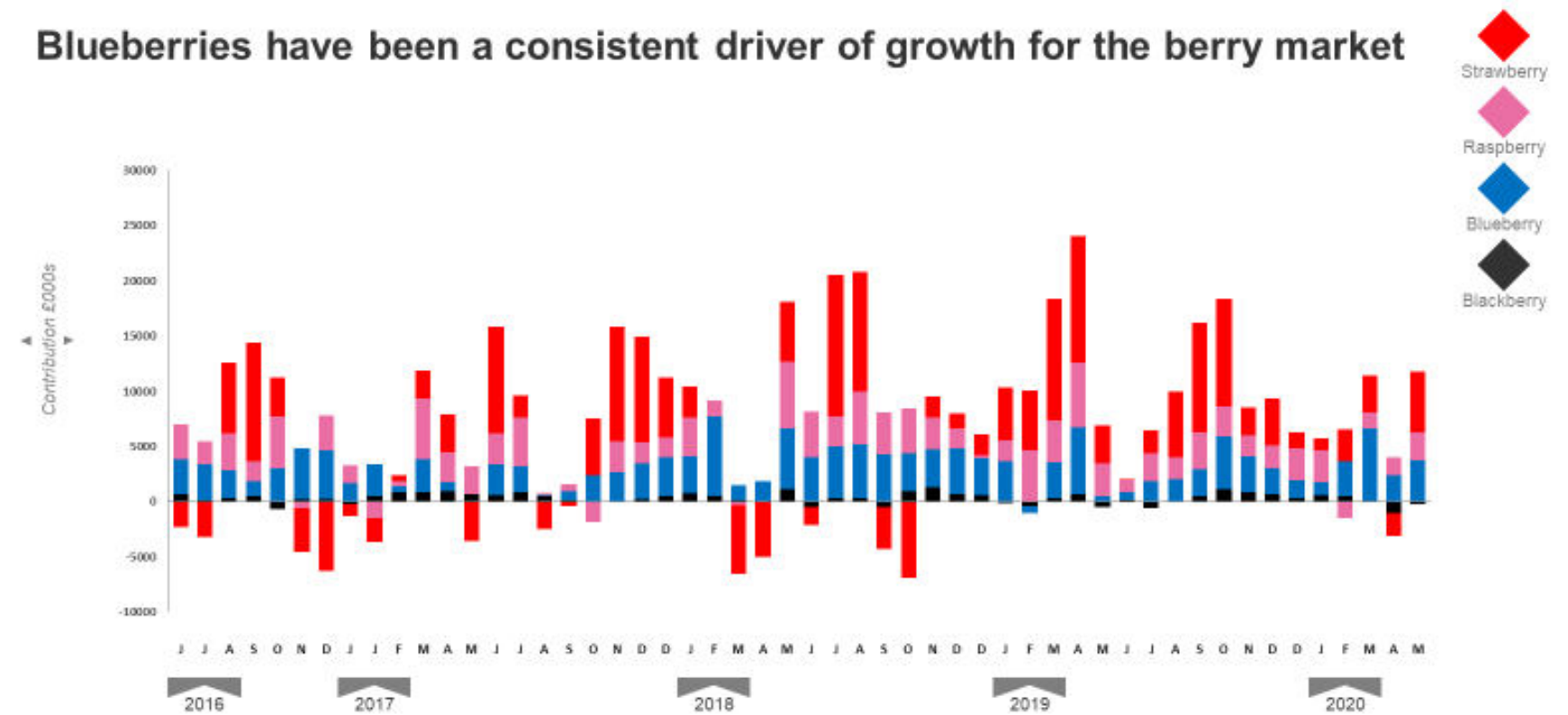




# Consistent Driver of Growth



Blueberries have been a consistent driver of growth for the berry market



Berries have grown significantly ahead of both Total Produce and Fruit in the last 5 years.



**Total Produce**  
Val: +£1.1bn  
(+13.1%)



**Fruit**  
Val: +£578m  
(+17.2%)



**Berries**  
Val: +£145m  
(+48.4%)



# Growing Market



Kantar very recent UK data shows Apples 15% retail value, grapes 14.3%, citrus 13.3%, strawberries 12.6%, bananas 9.9% and **blues 8.1%**.

Fresh berries have 28% of the total retail fruit value and are heading towards 30%. **Blueberries**, in value terms, **will pass bananas in 3 years** or so. As ex-Chiquita this is a big thing!



# Why Blueberries?



## Positive Research & Press on the Health Benefits of Blueberries Impacts Berry Sales

Consumers around the world continue to hear about new & positive health benefits of including blueberries in their diet.



SUPERMARKET

- **Consumer confidence in the category**
- **High repeat purchase ( if the quality is in line with the expectation)**
- **Low shrink/in store waste**

Health Research



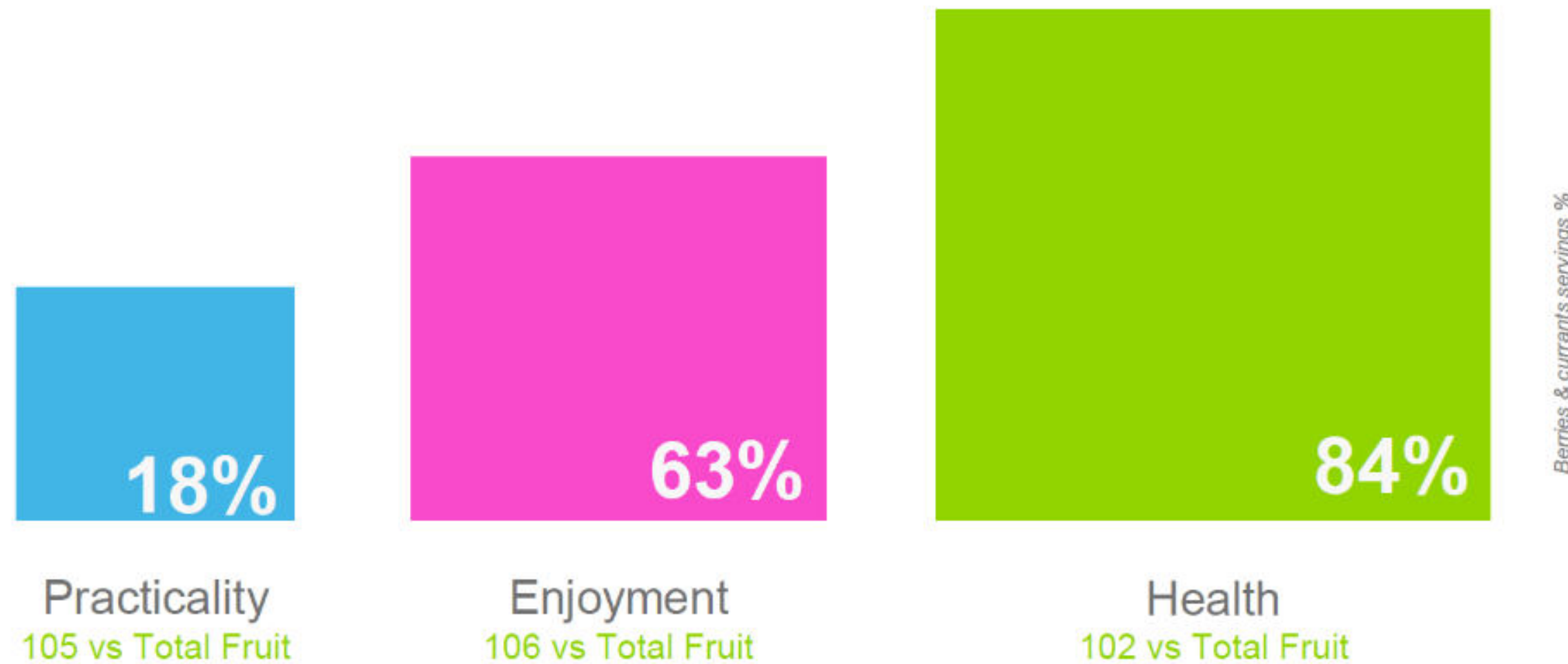


# Why Blueberries?



**Health is THE key consumer need state when choosing Berries.**

Berries also over-index for Enjoyment and Practicality when compared to Total Fruit.



# Health...

## Heart health Measured by the handful



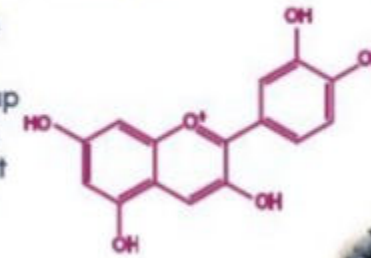
## GRAB A BOOST OF BLUE



An easy way and nutritious solution to eating well – just grab a handful, rinse and enjoy!

### BOOST YOUR DAILY RECOMMENDED SERVINGS OF FRUIT.

Blueberries contribute phytonutrients called polyphenols. This group includes anthocyanins (163.3 mg/100 g), plant compounds that give blueberries their beautiful blue color.



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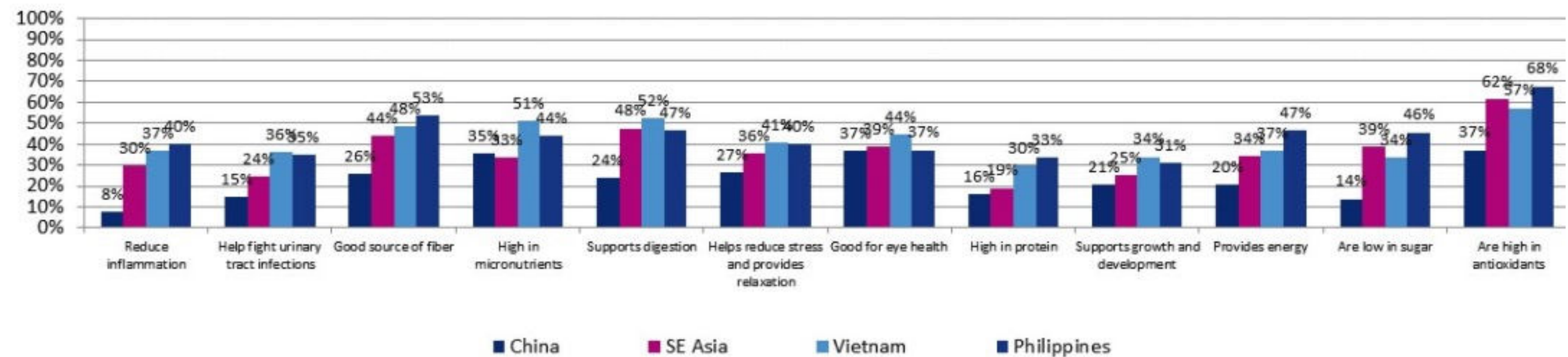
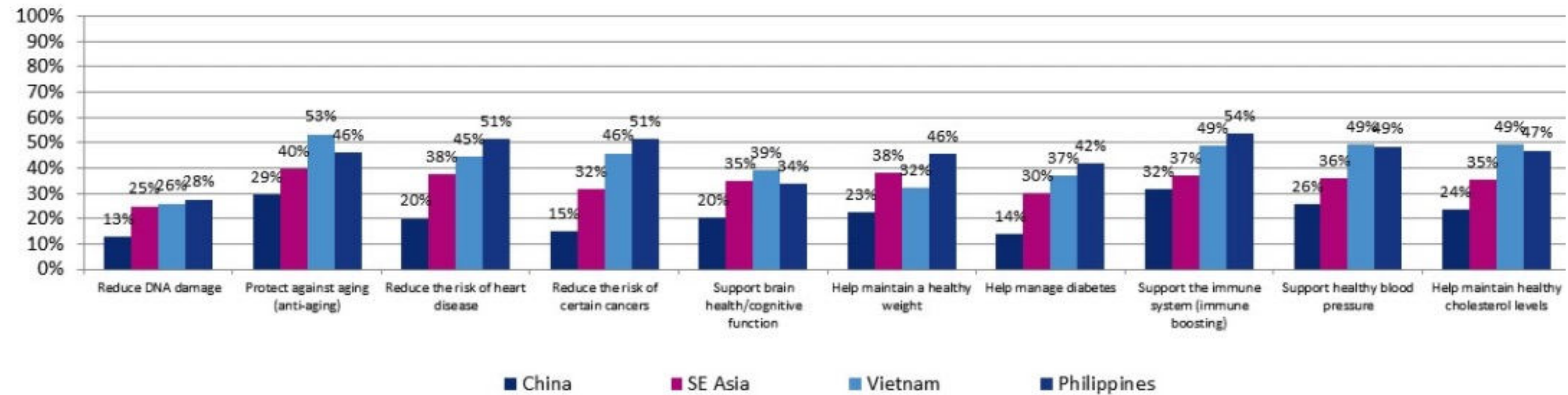
  
**blueberries®**  
U.S. Highbush Blueberry Council



# Big Health Awareness in Asia



Awareness that Eating Blueberries Can Help with Health Issues

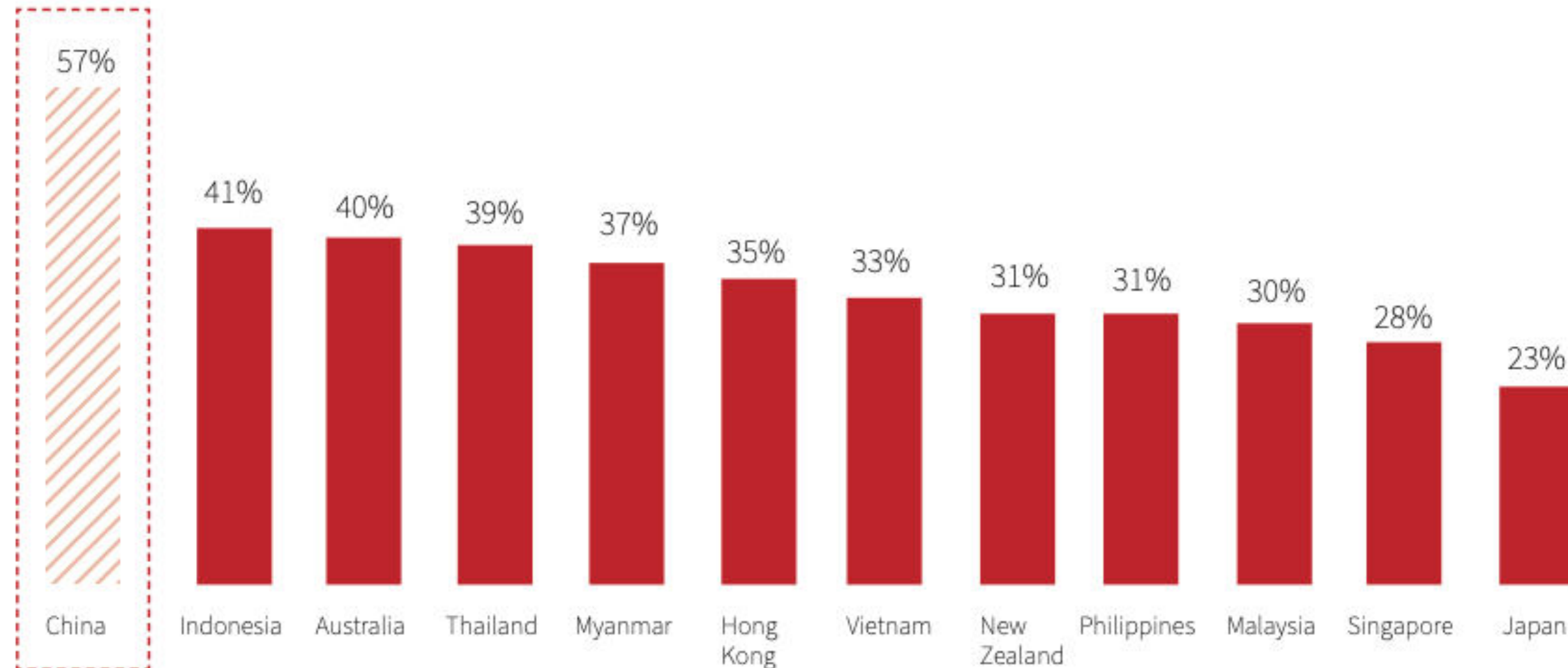


Health Awareness is much more important in Asia compared to Europe & the US



More than half of Chinese consumers check a product's nutritional values and potential impact on health before making a purchase

% of people who chose to check nutritional values and potential impact on health



Source: PwC Survey 2020

# Through the Eyes of Consumers



## Purchase



**Good looking**  
(nice shape, color and no moisture)



**Availability**  
(Easy to find in shop)

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## Repurchase



**Not Sour**  
(Excellent Taste)



**Not Soft**  
(Good Firmness)



# Firmness is important



Driven by firmness leading to consistent quality.  
Quality cannot be compromised

QUALITY (Firmness) will be the key promise

Blueberries today are often too soft for Supermarkets (resulting in waste) and unsatisfied consumers who stop buying.

Pink Lady, Royal Gala, Driscoll's Maravilla raspberry, all successful brands based on genetics providing firmness

Crunchy is 'hot'

Driscoll's Maravilla: Sweet, Appealing And Long Lasting  
Published on May 10 2019 5:10 PM as Fresh Premium tagged: IssuingPhoto / Driscoll's / Raspberry / Maravilla



## "Crunchy" is the Most Used Claim on Food Labels in Italy in 2020

"Croccante" (crunchy) is the main attribute mentioned on labels of food sold in Italy, based on a just published Nielsen research on 70.000+ SKU's.

Crunchy is becoming a **very important purchase criteria** and the **positive characteristics** of the blueberry.



nielsen

BLUEBERRY SUPERFOOD INGREDIENT IN ITALY ACCORDING TO NIELSEN  
CONSUMPTION, HABITS, NUTRITION, DETAIL, MARKETING, HEALTH by THODRABRO JULY 2020

China 2021 - Henk Vaandrager: what is not crunchy, cannot be sold.



# Size is important

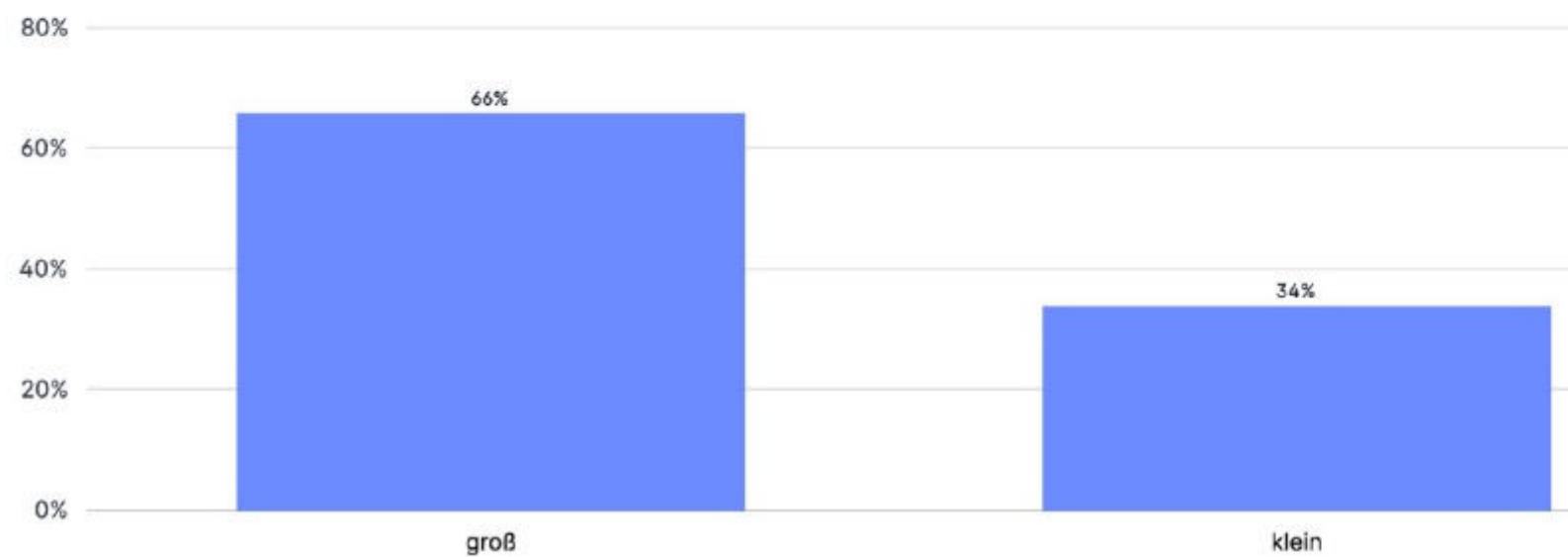
2/3 of European consumers prefer big blueberries...  
and this is not different in China



The result at the market research platform Appinio. 66% prefer large blueberries.

2. Frage: 200 Teilnehmer (100%)    Sortierung ☐           Darstellung nach: **Standard**

Magst du lieber große oder kleine Heidelbeeren ?



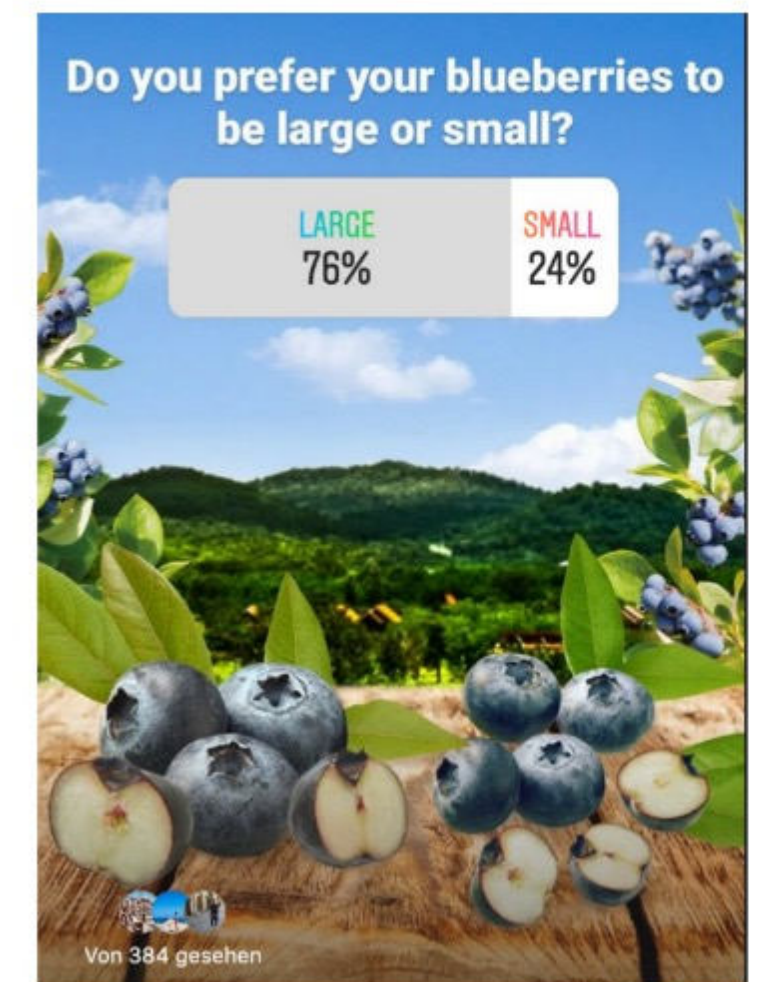
And on instagram more or less the same:



On Facebook 80% are for big blueberries.



Taste the SUN 



# Growth Opportunity

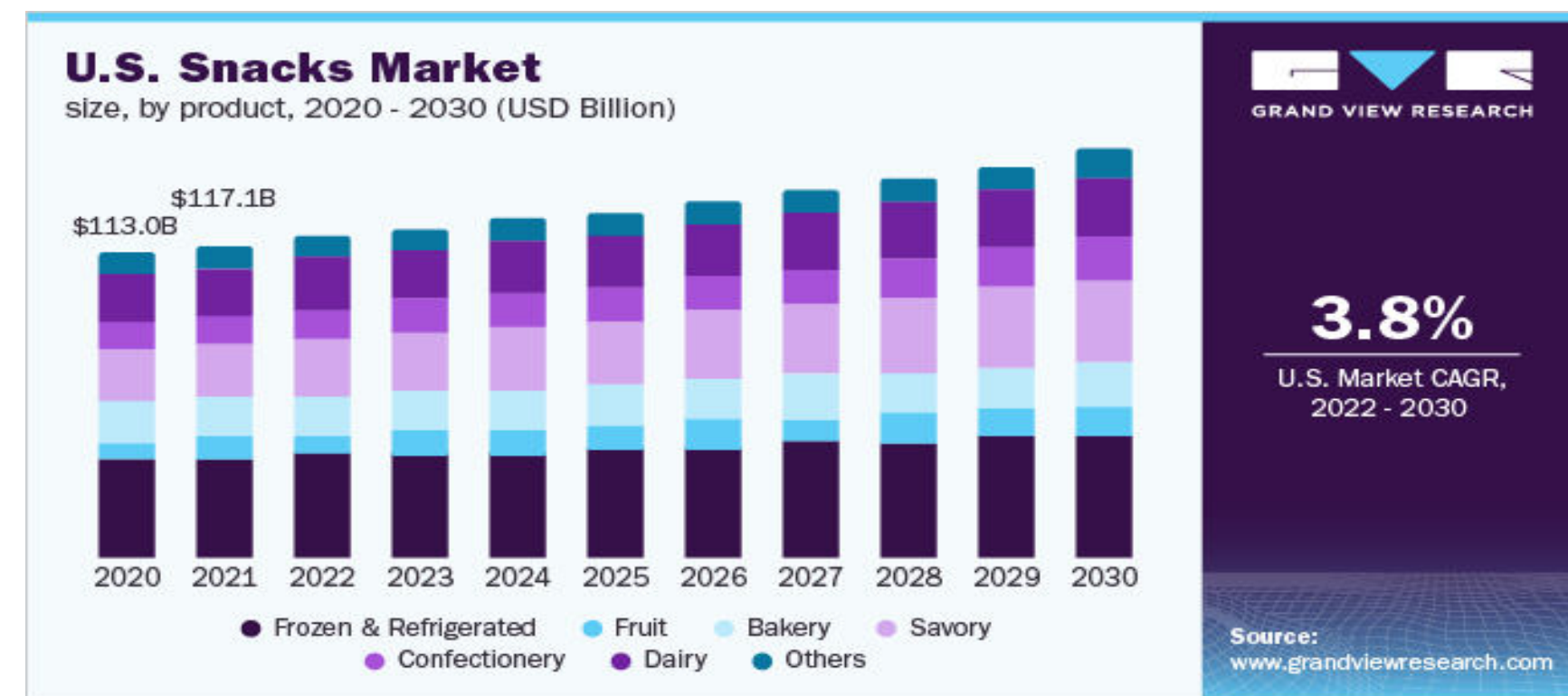


Today blueberries are mainly consumed in Breakfast  
...but the snacking category is **4x bigger**

The **global breakfast** food market size was **valued at \$398.1 billion** in 2020, and is projected to reach \$729.5 billion by 2030, registering a CAGR of 6.3% from 2021 to 2030.



The **global snack** market size was valued at **\$ 1,450.4 billion** in 2021 and is expected to expand at a compound annual growth rate (CAGR) of 2.7% from 2022 to 2030.



<https://industry-update.com/cereal-dtc-brands-such-as-magic-spoon-change-the-game-for-breakfast-2022/63187/>

<https://www.grandviewresearch.com/industry-analysis/snacks-market>





**SEKOYA®**

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**So, What is SEKOYA™ ?**

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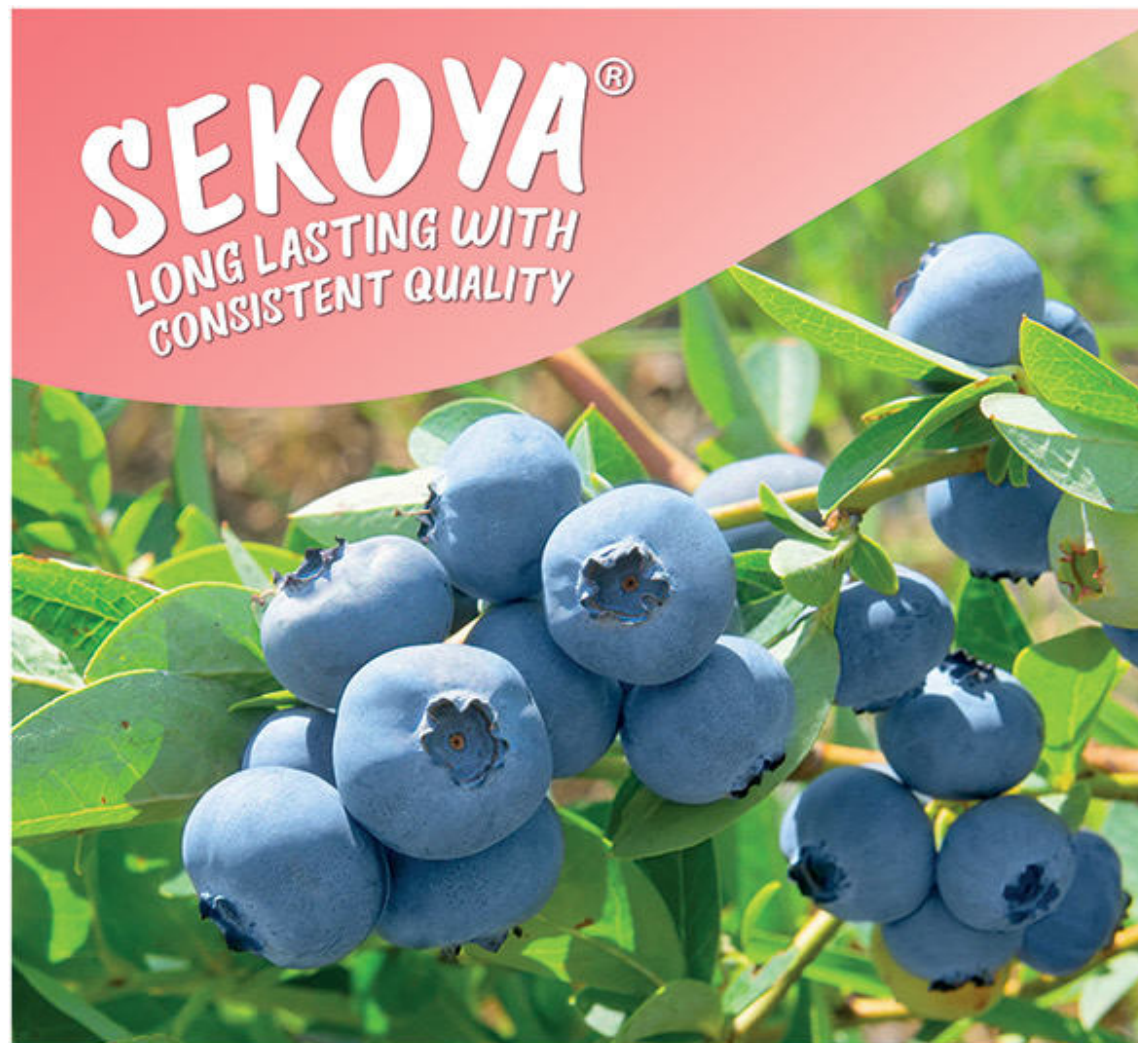




# What is SEKOYA™?



SEKOYA™ is a **B2B platform** designed to deliver the LIVIE™ Eating Experience: crunchy, long-lasting, big & tasty blueberries – 52 weeks per year.





# Value Proposition



- A **semi-exclusive network** of 14 highly professional SEKOYA™ Licensee Members (growers/marketers) targeting 52-week per year **supply programs**.
- An **actively managed supply platform** built around a package of varieties, services, quality assurance, and supply chain coordination to serve the **premium fruit** market segment.
- Organized & managed to deliver **defined volumes to all major markets** across the 52-week period.
- **Transparent membership**. Members are not a secret; they are the secret behind the successful 52-week supply. Members can work with Sublicenses – growers.





# SEKOYA™ Members



15 Members have global rights and opportunities.



# 52-Weeks Premium Fruit Supply



Early

Mid

Late

- HIGH CHILL
- MID CHILL

PRODUCTION SEASON  
Early

BERRY SIZE  
18 - 28 mm

SHELF LIFE  
Up to 45 Days

QUALITIES  
Exceptionally Firm,  
Jumbo Size, Light Blue,  
Sweet & Aromatic

SEKOYA CRUNCH™

FC13-083

PRODUCTION SEASON  
Mid

BERRY SIZE  
18 - 28 mm

SHELF LIFE  
45+ Days

QUALITIES  
Very Firm, Jumbo Size,  
Sweet & Aromatic,  
Light Blue

SEKOYA GRANDE™

FC13-122

PRODUCTION SEASON  
Late

BERRY SIZE  
18 - 28 mm

SHELF LIFE  
Up to 45 Days

QUALITIES  
Very Firm, Crispy & Meaty,  
Jumbo Size, Light Blue,  
Sweet & Aromatic

SEKOYA FIESTA™

FC13-113

- LOW CHILL
- NO CHILL

PRODUCTION SEASON  
Very Early

BERRY SIZE  
18 - 28 mm

SHELF LIFE  
45+ Days

QUALITIES  
Exceptionally Firm,  
Jumbo Size, Uniform,  
Sweet & Aromatic

SEKOYA POP™

FCM14-052

PRODUCTION SEASON  
Early-Mid

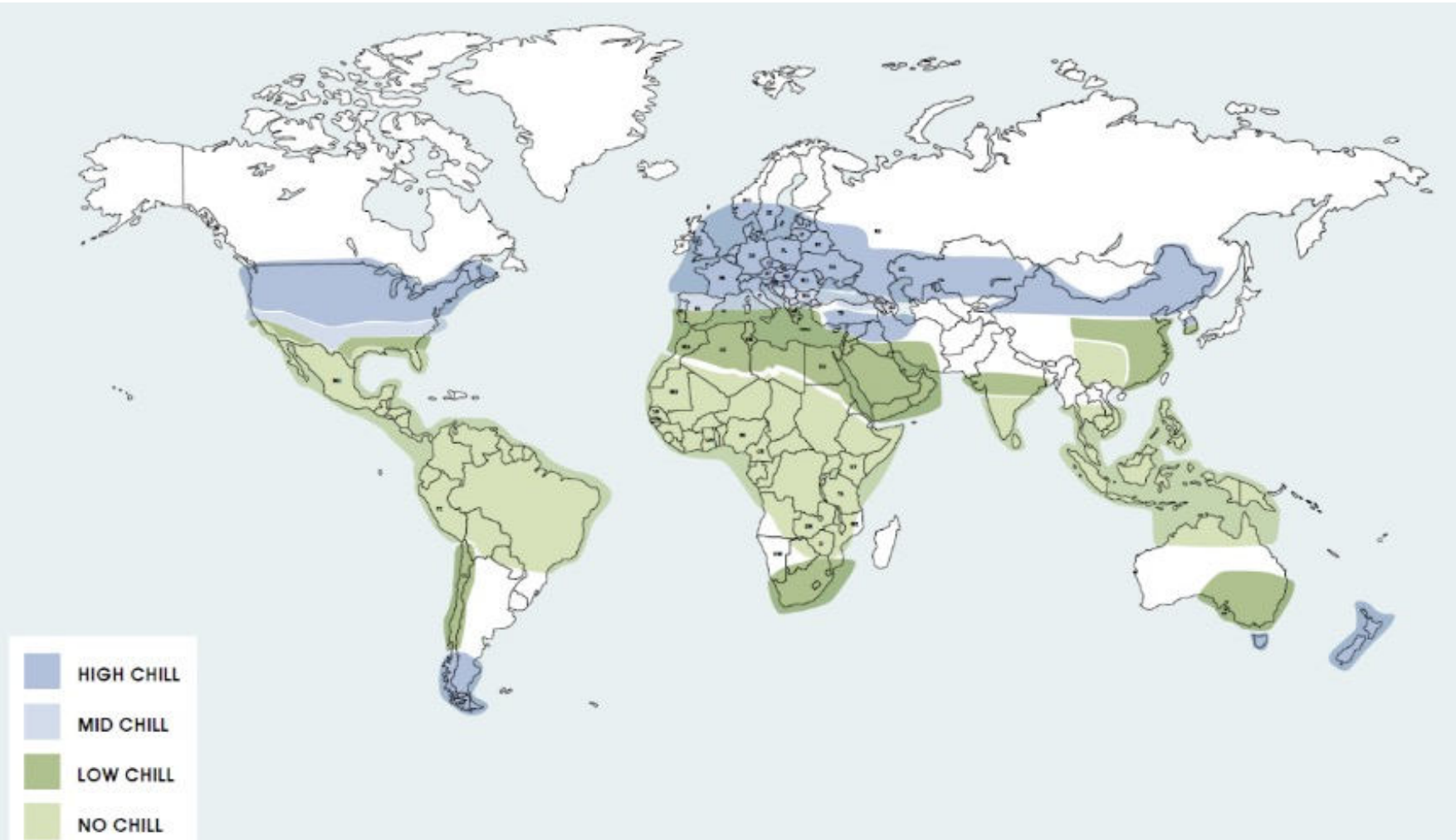
BERRY SIZE  
18 - 28 mm

SHELF LIFE  
45+ Days Top Quality

QUALITIES  
Uniform, Jumbo Size,  
Very Firm, Light Blue,  
Sweet & Aromatic

SEKOYA BEAUTY™

FCM12-097

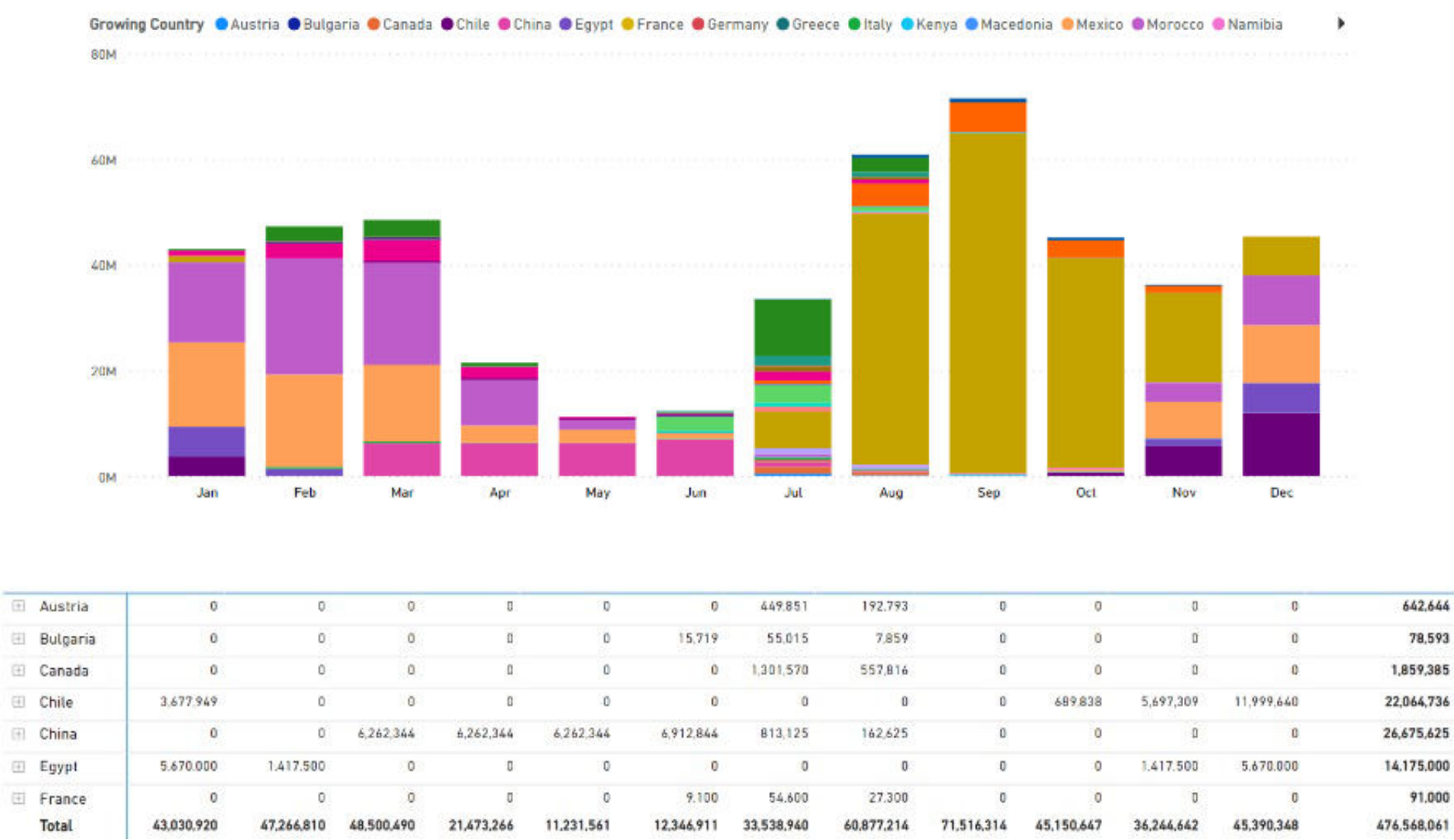
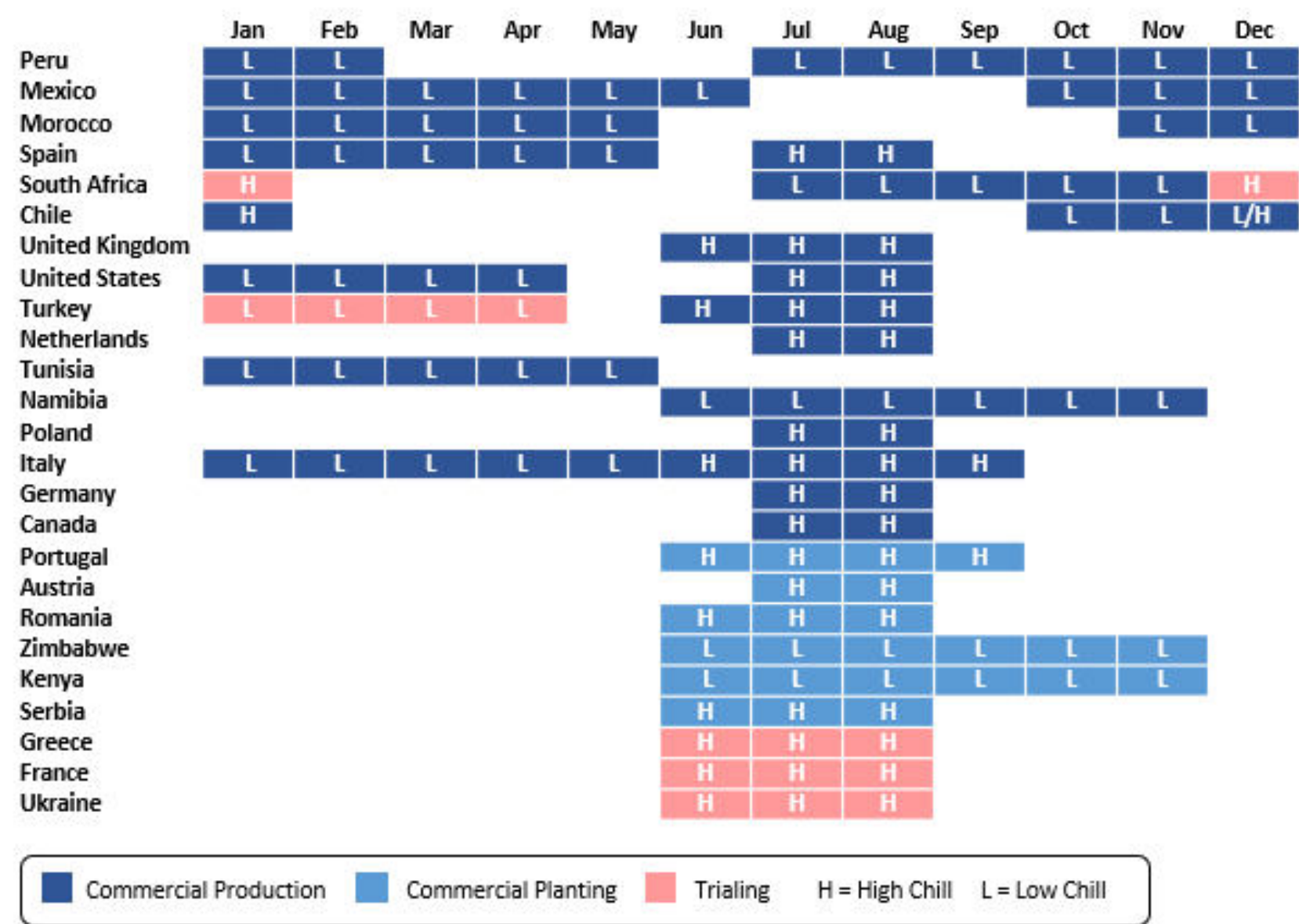




# Procurement for Retail



SEKOYA™ Value Planning with our members allows retailers and fruit buyers to have access to all strategic information





# 52-Weeks Big & Crunchy Berries





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# LIVIE™ Update

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# SEKOYA™ vs. LIVIE™

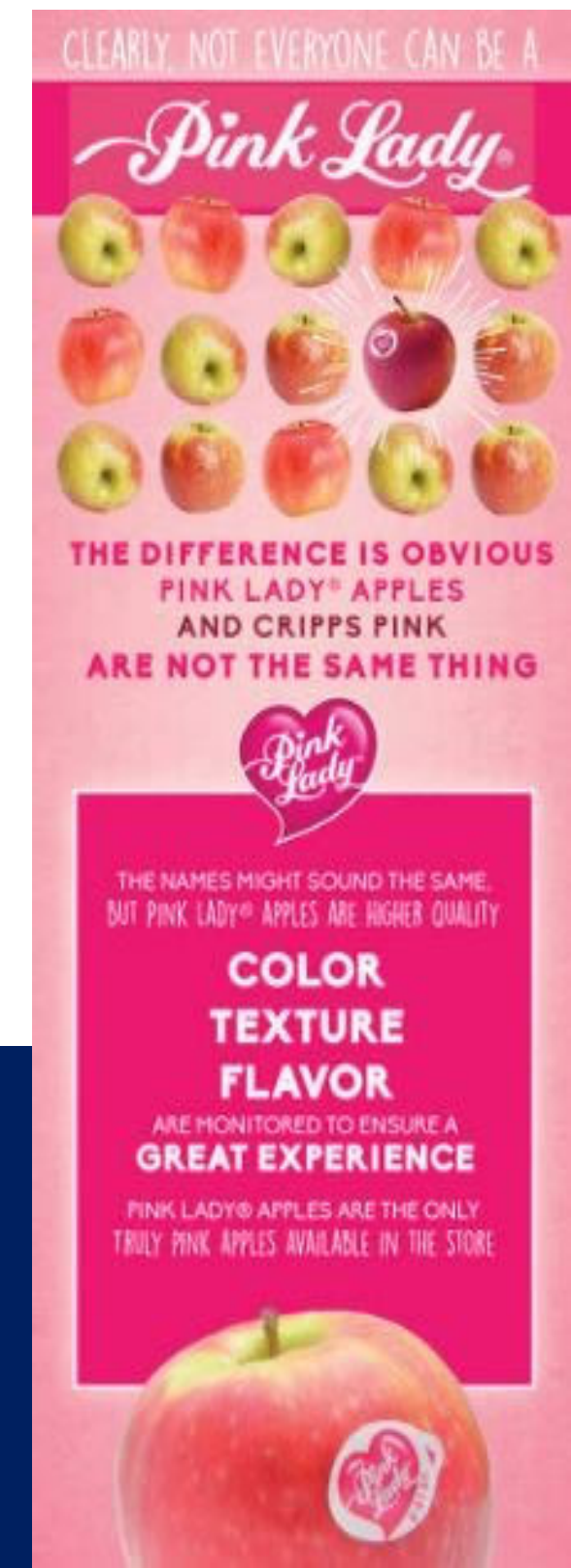


Just like not all Cripps Pink apples are Pink Lady apples,  
not every SEKOYA™ Blueberry can become a LIVIE™ Blueberry.

LIVIE™ Blueberries are a selection of blueberries from our SEKOYA™ Network  
that must fulfill our promise of **consistent quality**:

- Firmness
- Large Size
- Great Taste
- Beautiful Appearance
- Long Shelf-life

LIVIE™ Blueberries are a selection of our SEKOYA™ Blueberries





# LIVIE™ Quality Specifications



Size: >18mm



Brix: >11

Acidity: <1.1

Ratio B/A: >13:1

Firmness: >70 shores



These are the parameters for full acceptance.

For information on tolerances, please review the official LIVIE™ Quality Specification Guide provided by our SEKOYA™ Quality Department.



# The LIVIE™ Quality Logo



## LIVIE™ BRAND

### WHY FRUIT BRANDING?

**Value creation** is an important aspect in growing the berry category – focus on the shopper and the moments of consumption. Blueberry consumption **doubled** in the last 5 year **from 1 to 2 million tons/year**. All parameters indicate the consumption will double again the following 5-7 years. This will be a very big category.

Too many Fresh Produce products in the supermarkets are still commodity goods. Extra growth happens through **differentiation in assortment & branding**.





# The Challenge Today...



Over 50% of consumer experiences in blueberries today are negative.  
Less than 25% of consumer experiences align with their preferences.

WINNING THE CONSUMERS' **TRUST** WILL LEAD TO **REPURCHASE**.



We have chosen an **on-pack quality logo** (an Ingredient Brand like Intel Inside) that consumers can trust and count on to identify the best blueberries from our SEKOYA® Network:

**LIVIE™**

Only berries of **consistent quality** that meet our highest standards in terms of **size, firmness, flavor, appearance** and **shelf-life** will bear the LIVIE™ Quality Assurance.

**QUALITY  
ASSURANCE**



# Our Brand Purpose



Our brand essence is simple: **Consistent Quality**

- Establish reassurance and trust in the product
- Add value to our authorized users
- Create distinction in the market

**We believe that supplying exceptional berries every day is not only possible but can be assured!**

Key Drivers: **Consistent Quality** and **Never Being Disappointed**

Our Promise – **THE BETTER BERRY INSIDE™!**





# Who can use the logo?



**DISRUPTIVE & SIMPLE: Only SEKOYA™ Members & Supermarkets**





# What do retailers get in return?



- **Satisfied** customers
- Higher **consumer trust** leading to continuous repurchases
- **Less waste** at store level
- A tool to increase sales via expanded **category management**

**52-weeks consistent quality** means  
no missed sales...

(bad quality = stop buying for 6-10 weeks)



...resulting in a **category growth** of  
**11-20%** on a yearly basis.



# LIVIE™ POS Material



We will create **PULL**

...by interacting directly with consumers via Social Media/Influencers, Media, POS materials...



Posts will explain:

- What LIVIE™ is
- Consumer benefits
- Where to find it
- Fun ways to implement LIVIE™ Blueberries in one's activities





# We believe in Snacking



New blueberry varieties are suitable due to ...





# Thank you!



## Questions?



[www.sekoyafruit.com](http://www.sekoyafruit.com)