



Chile, August 2018

European perspective



- An overview of Angus Soft Fruits
- The UK & European berry market
- Changes in global blueberry supply to Europe
- Challenges & Opportunities for Chilean blueberry industry



Angus Soft Fruits - Film



What we do



Delivering great tasting fresh berries that will delight our customers each and every day

EXCEED INNOVATE COLLABORATE EFFICIENT INTEGRITY

angus
SOFT FRUITS

SWITHENBANK
fresh & natural

Our customers

ALDI

BOOTH'S
FOOD, WINE AND GROCERY

M&S

Sainsbury's

TESCO

Morrisons
Since 1899

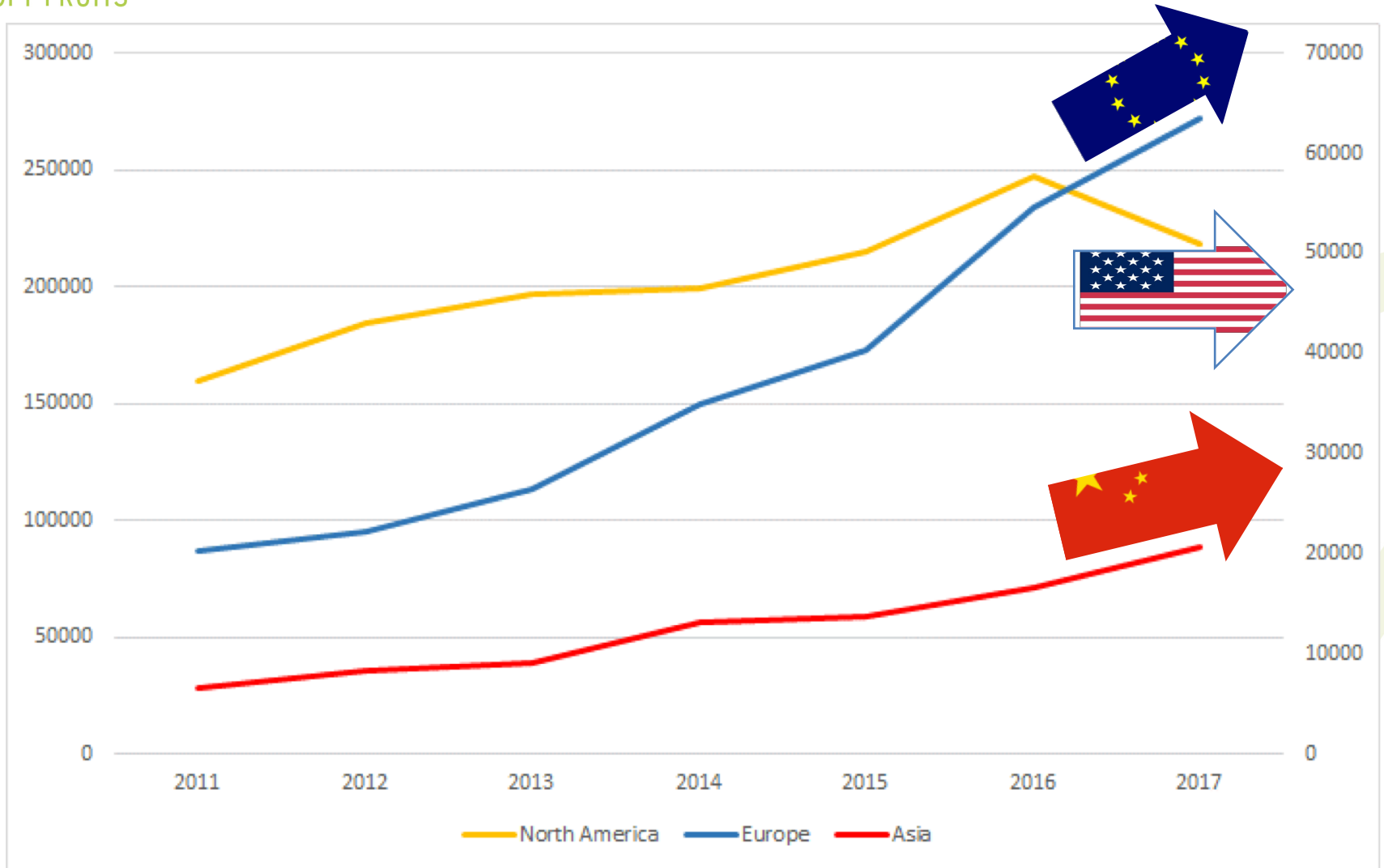
ASDA

freshdirect™

Reynolds
more than just a greengrocer

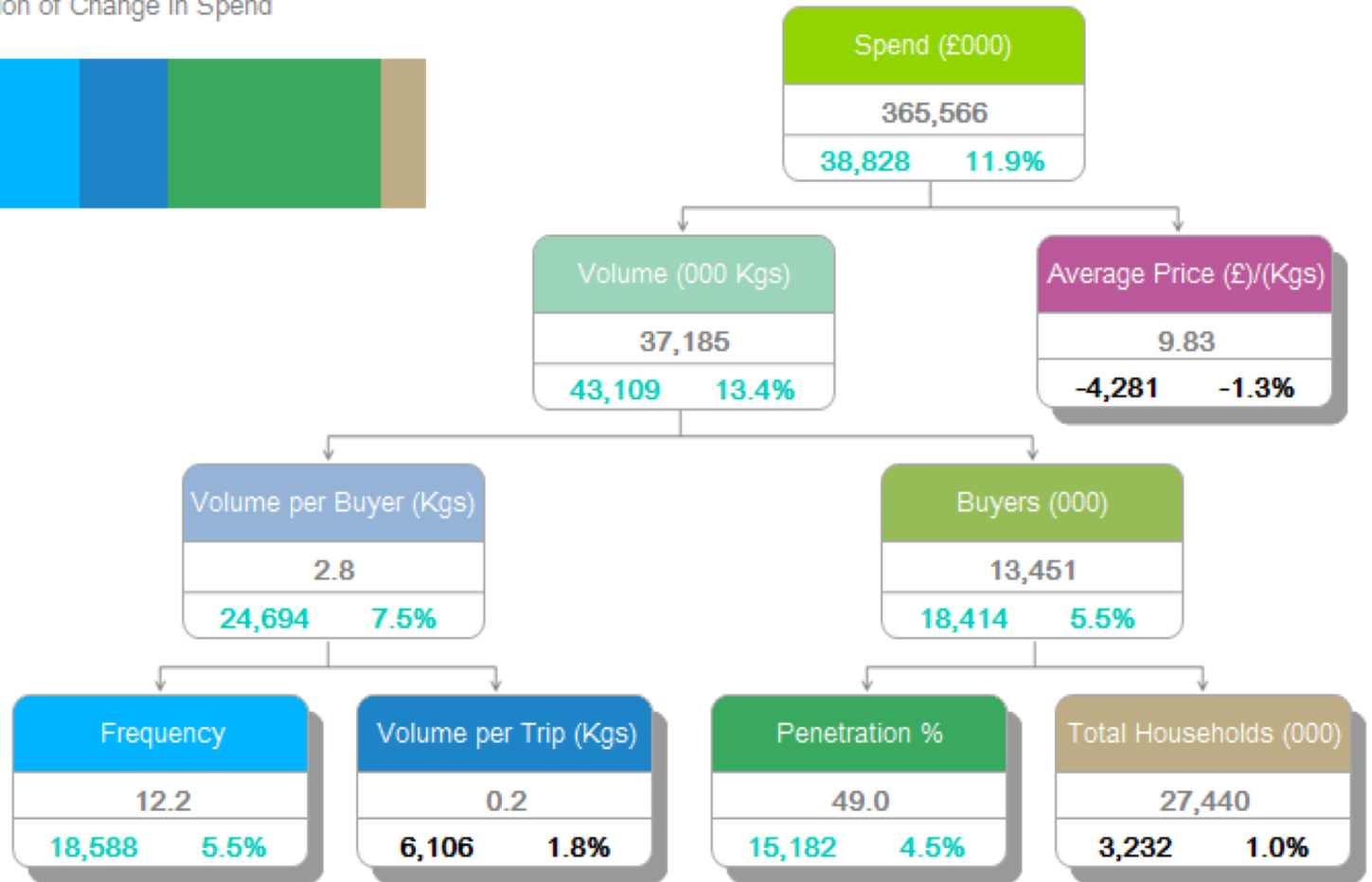
COOP

Global blueberry market growth



UK blueberry market growth

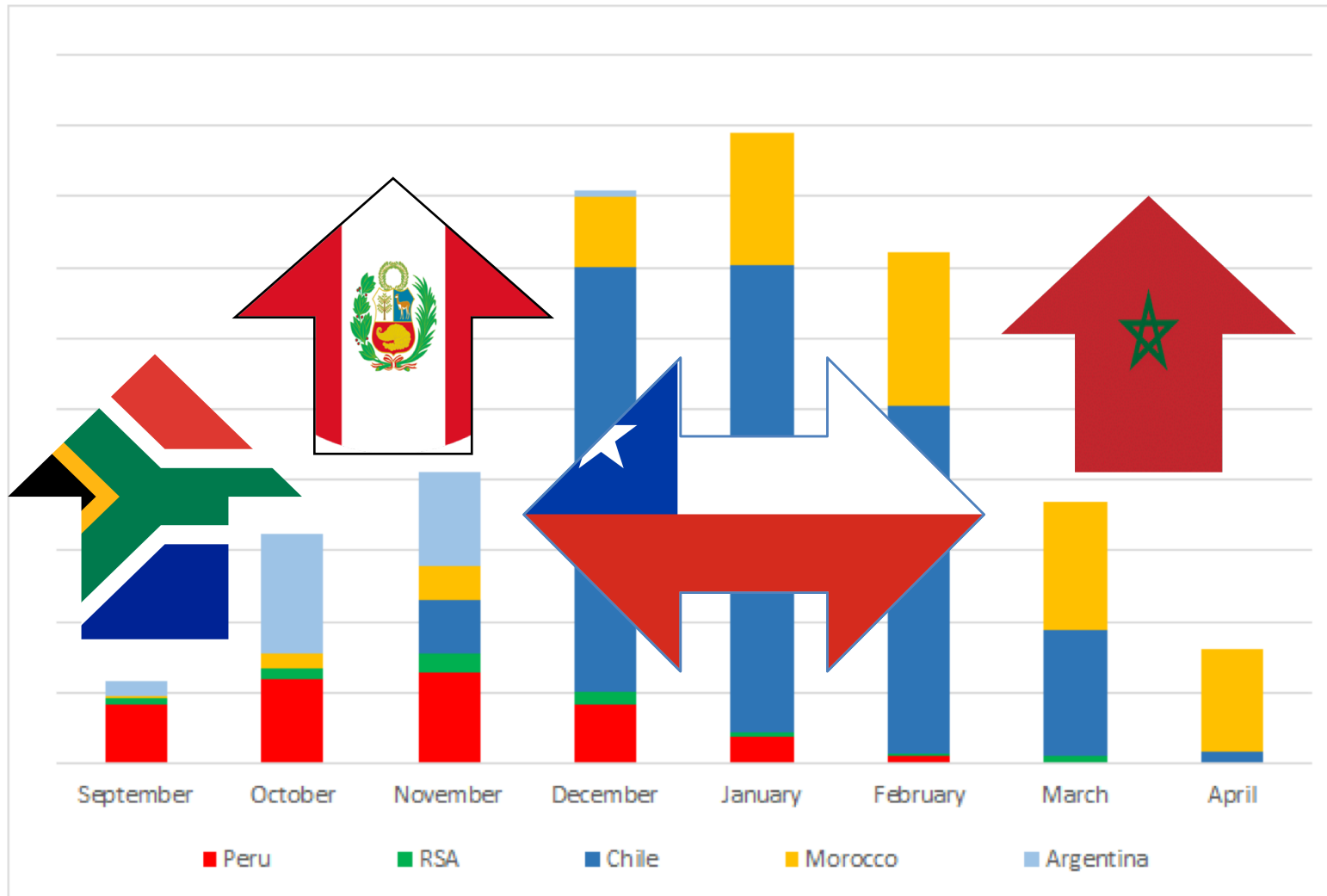
Attribution of Change in Spend





- Berries = largest fruit category in the UK
- Multiple pack sizes & ranges
- Longer shelf life

Changing blueberry supply (Europe)



Peru, Mexico & South Africa

- Large scale production
- Latest generation genetics
- Low production costs
- Investment in supply chain infrastructure
- Short shipping times
- Strong, bold fruit but questions over Peruvian & Mexican flavour

- Long established, professional industry
- Perception of Chilean blueberry quality has slipped over the past 5 years
 - Excessive organic production
 - Older plantations & varieties
 - Chill chain
 - Excessive trading & speculation
 - Sea freight times - > 35 days (Peru & RSA 14 days)

The image features a white background with decorative wavy lines. A thick green line curves across the top left, and a thick red line curves across the bottom right. The text "Thank you" is centered in a green, sans-serif font.

Thank you