



# Desafíos de la Industria del Kiwi Chileno

Ricardo González  
Copefrut S.A.

Oscar Villegas  
Exportadora Subsole S.A.

# ¡UN KIWI RICO DE MARZO A OCTUBRE!



# ¿Qué significa un kiwi rico de Marzo a Octubre?

- Un kiwi dulce, con la acidez justa, sin columela dura, con la presión adecuada, que produzca:
  - “Sabor y consistencia”
  - “Repetición de la compra”
  - “Preferencia por el kiwi Chileno”



# Desafíos de la Industria



**Productivos**

**Post cosecha**

**Comerciales en origen y destino**



**Comisión  
Producción**

**Comisión Post  
Cosecha**

**Comisión Comercialización  
y Marketing**

Un esfuerzo conjunto entre Productores y Exportadores

**FedeFruta**  
FEDERACIÓN DE PRODUCTORES DE FRUTA DE CHILE

**ASOEX**  
ASOCIACIÓN DE EXPORTADORES DE FRUTAS DE CHILE S.A.  
"Juntos, nuestra fruta vale más"

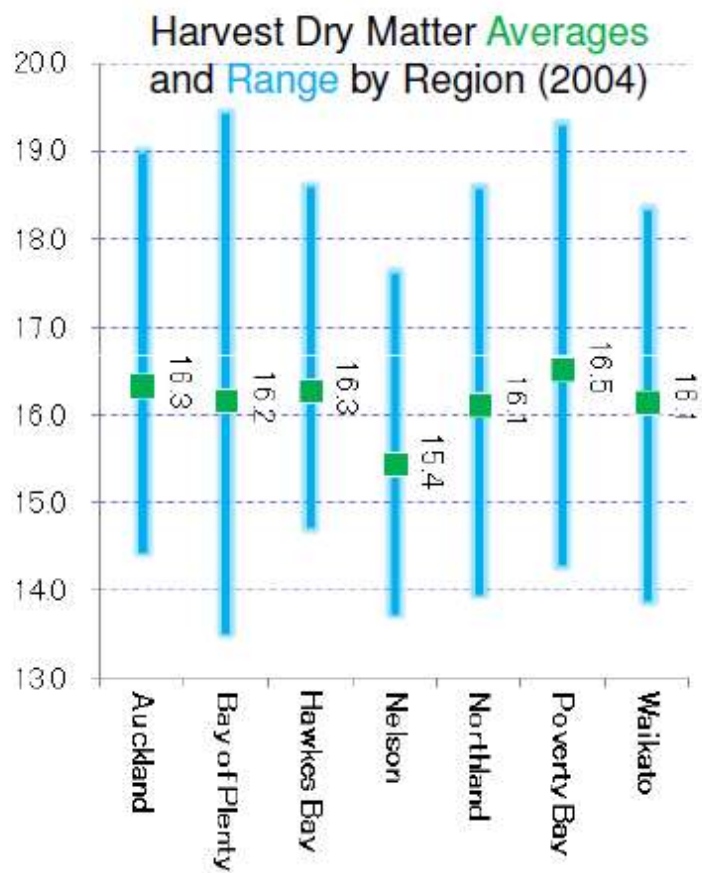
# Desafíos Productivos



- Producción alta materia seca
- Homogeneidad
- Buena guarda
- Sin columela dura
- **¡Consistencia y Sabor!**



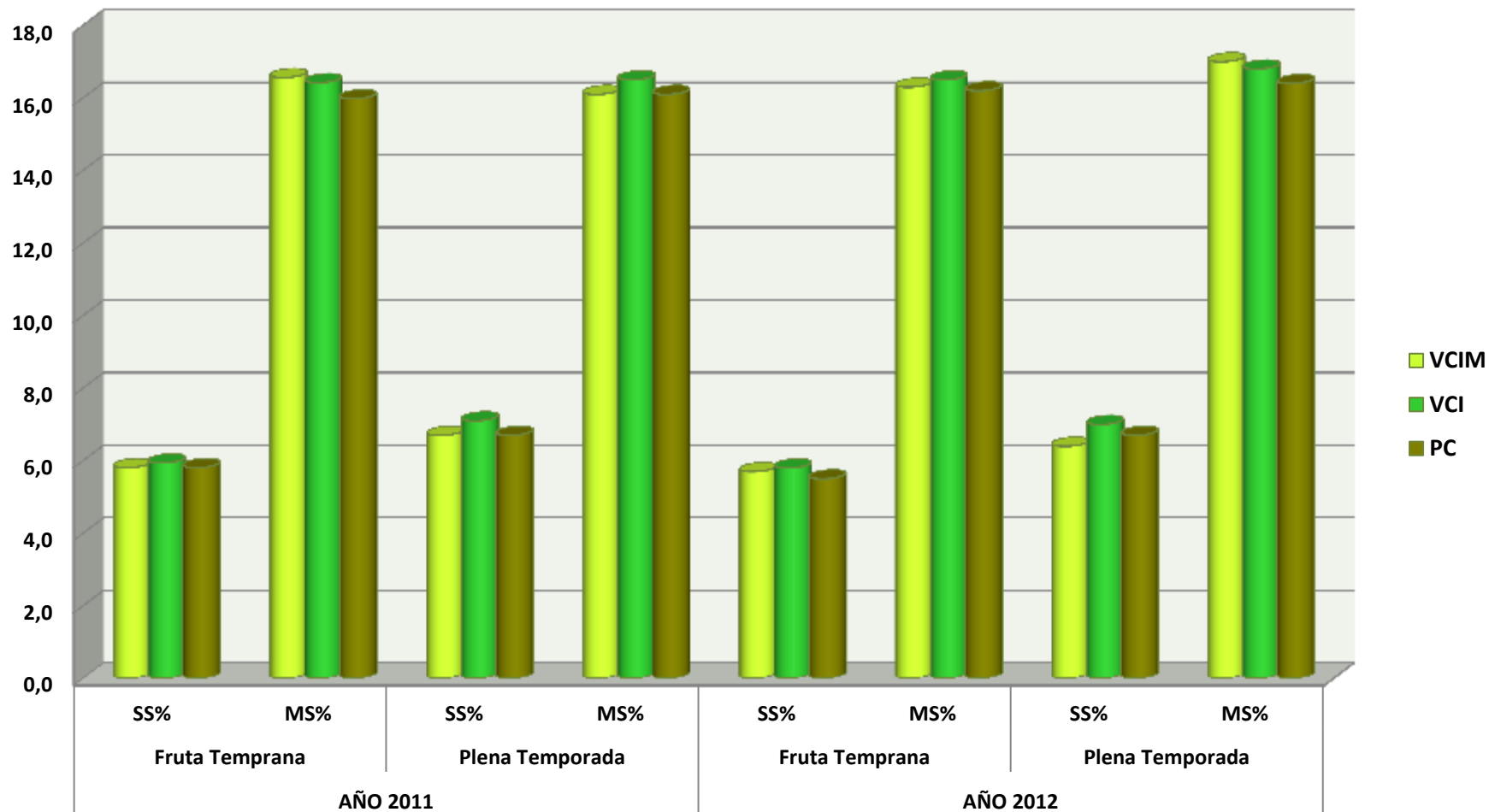
# Materia Seca por Zona de Producción



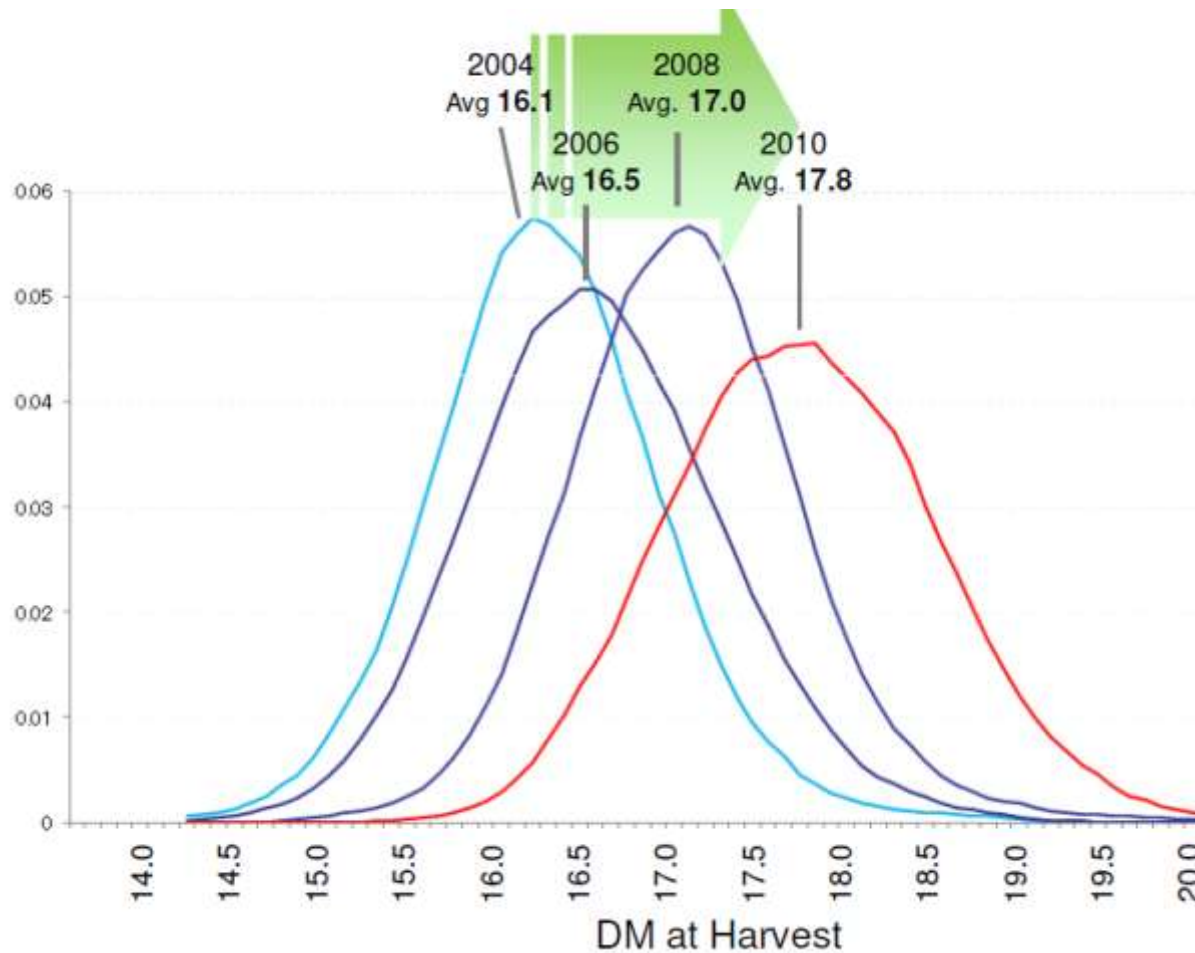
Fuente Zespri



## Chile Parámetros de Madurez por Zona Agroclimática Temporadas 2011 - 2012



# Aumento de Materia Seca Hayward - NZ



Fuente Zespri

Un esfuerzo conjunto entre Productores y Exportadores

FedeFruta  
FEDERACIÓN DE PRODUCTORES DE FRUTA DE CHILE

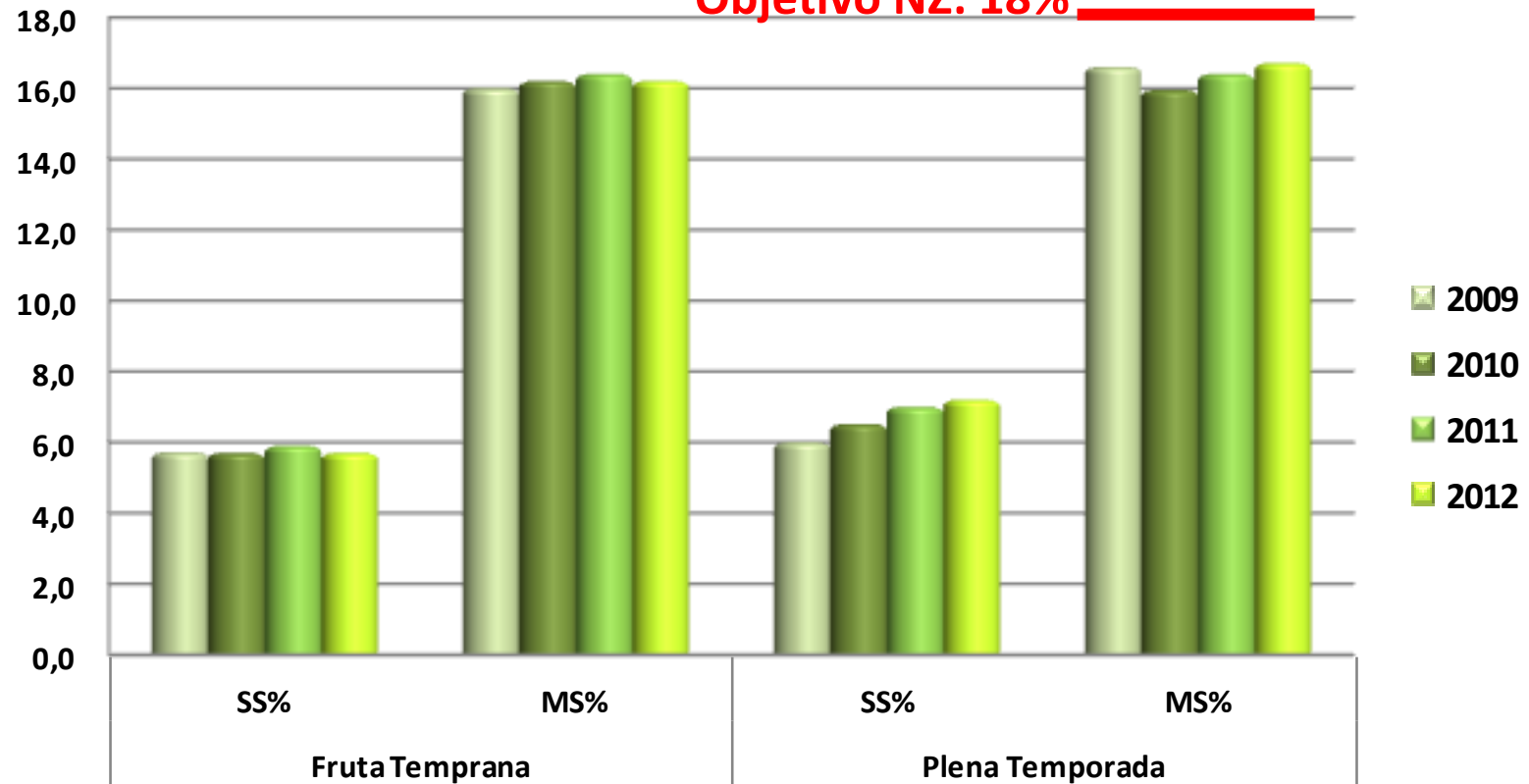
ASOEX  
ASOCIACIÓN DE EXPORTADORES DE FRUTA DE CHILE  
"Juntos, nuestra fruta vale más"





## Comparativo Parámetros de Madurez Temporadas 2009-2010-2011 y 2012

**Objetivo NZ: 18%**



# Desafíos Productivos PSA...un desafío país



- NZ pérdidas directas por USD 410 millones en 5 años
  - Apoyo inicial del Gobierno USD 40MM
  - Formación de KVH público-privado para el manejo de la enfermedad
- Italia pérdidas por EUR 40 millones sólo en el área de Latina



Un esfuerzo conjunto entre Productores y Exportadores

**FedeFruta**  
FEDERACIÓN DE PRODUCTORES DE FRUTA DE CHILE

**ASOEX**  
ASOCIACIÓN DE EXPORTADORES DE FRUTAS DE CHILE  
"Juntos, nuestra fruta vale más"

# PSA...amenaza latente



La industria del Kiwi en Chile:

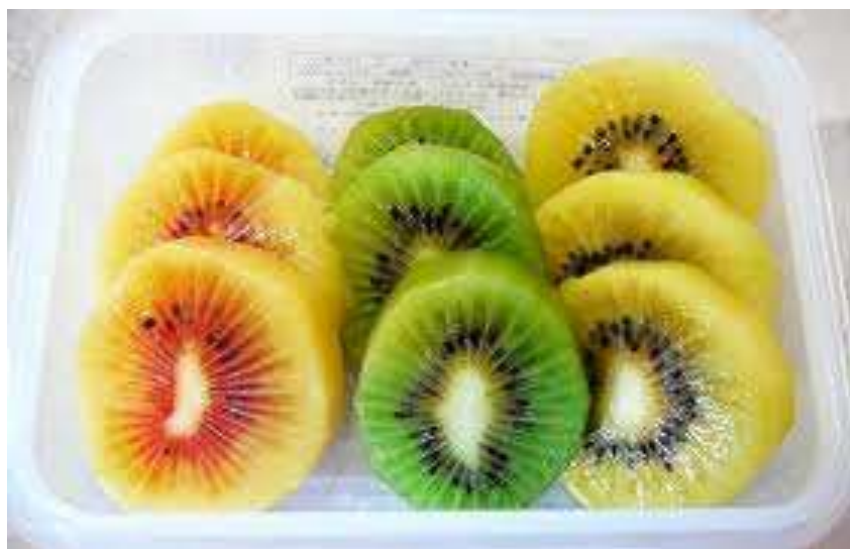
- USD 200 MM facturación anual
- USD 1000 MM en Huertos e Infraestructura
- USD 50 MM en mano de obra directa

**¡FALTA RECURSOS Y  
PREPARACIÓN PARA ENFRENTAR  
LA PSA!**

# Desafíos Productivos de Post Cosecha y Comerciales



- Nuevas variedades



Un esfuerzo conjunto entre Productores y Exportadores

FedeFruta  
FEDERACIÓN DE PRODUCTORES DE FRUTA DE CHILE

ASOEX  
ASOCIACIÓN DE EXPORTADORES DE FRUTA DE CHILE S.A.  
"Juntos, nuestra fruta vale más"

# Desafíos de Post Cosecha



- **UNIFORMIDAD Y CONSISTENCIA**
  - Daño por frío, pulpa translúcida, inconsistente
  - Columela dura
  - Des uniformidad de presiones
  - Protocolo de maduración en origen y destino para cada etapa de la temporada
  - Segregación de materia seca en origen
  - Ablandamiento prematuro
  - Pudrición

**MEJORAMIENTO DE PROCEDIMIENTOS E  
INCORPORACIÓN DE NUEVAS TECNOLOGÍAS  
QUE RESUELVAN ESTOS PROBLEMAS**

# DESAFÍOS COMERCIALES



Un esfuerzo conjunto entre Productores y Exportadores

**FedeFruta**  
FEDERACIÓN DE PRODUCTORES DE FRUTA DE CHILE

**ASOEX**  
ASOCIACIÓN DE EXPORTADORES DE FRUTAS DE CHILE  
"Juntos, nuestra fruta vale más"

# Desafíos Comerciales



1. **Guiar:** Indicar que kiwi necesitamos para ser exitosos, incentivando y alineando a producción, post cosecha y recibidores para llegar a la meta.

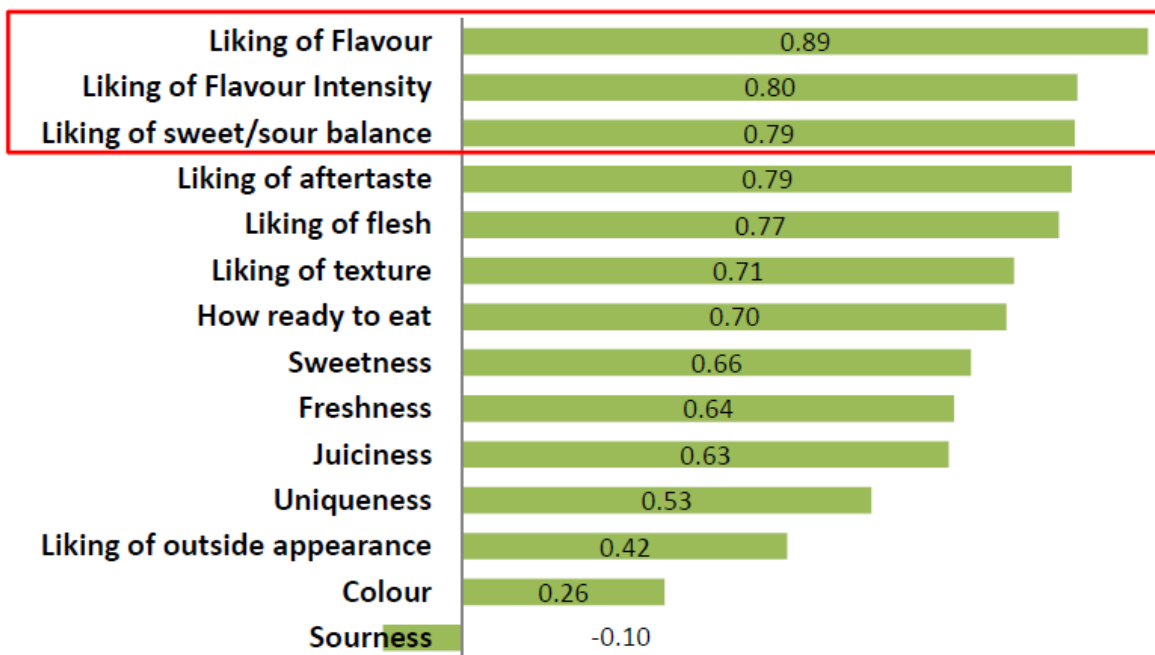


# Razones para Comprar Kiwis Japón



- *After flavour, sweet/sour balance is a key driver of overall liking.*

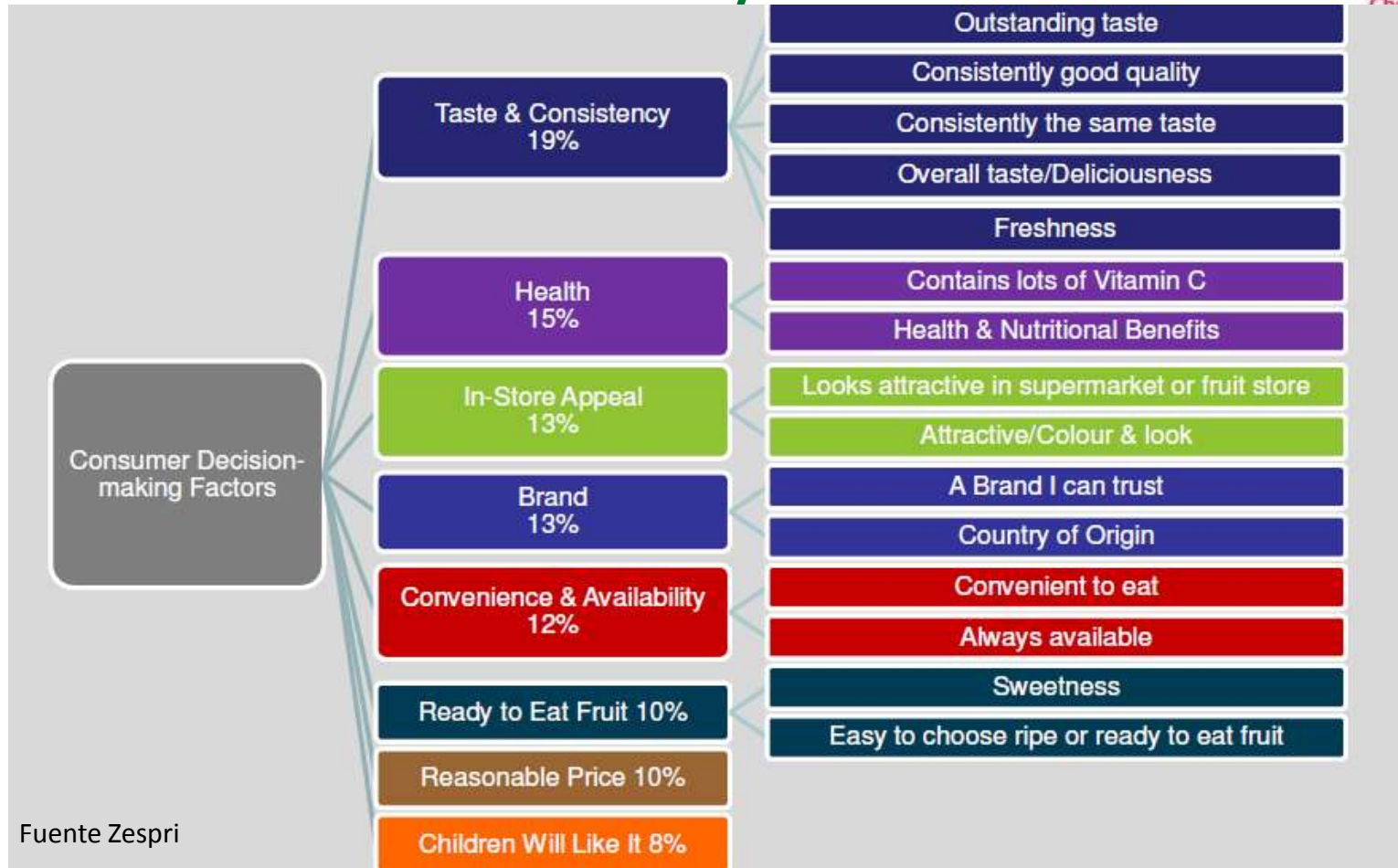
## OVERALL LIKING GREEN



Japan Sensory 2010 ISO week 19 Methodology: Pearson correlation  
Total sample; Unweighted; base n = 387



# Factor de decisión en la compra Consistencia y sabor N°1



## ¿PAGAR POR SABOR Y CONSISTENCIA, MS?

Un esfuerzo conjunto entre Productores y Exportadores

FedeFruta  
FEDERACIÓN DE PRODUCTORES DE FRUTA DE CHILE

ASOEX  
ASOCIACIÓN DE EXPORTADORES DE FRUTAS DE CHILE  
"Juntos, nuestra fruta vale más"

# Aumento de Materia Seca Hayward - NZ



Fuente Zespri

Un esfuerzo conjunto entre Productores y Exportadores

Fedefruta  
FEDERACIÓN DE PRODUCTORES DE FRUTA DE CHILE

ASOEX  
ASOCIACIÓN DE EXPORTADORES DE FRUTAS DE CHILE S.A.  
"Juntos, nuestra fruta vale más"

# Desafíos Comerciales



## 2. Involucramiento de las áreas comerciales desde PRODUCCIÓN al CONSUMIDOR FINAL.



# Desafíos Comerciales



## 3. Elección de RECIBIDORES especialistas de kiwis:

- Que vendan kiwi pre maduro, rico, que asegure un buen consumo
- Que implementen tecnologías de segregación
- Que puedan desarrollar la categoría y no sólo vender
- Trabajen en equipo con los supermercados presentado una buena propuesta de valor
- Que hagan promoción

PRODUCCIÓN

Embalaje y  
Frigoríficos

Fletes a  
puerto

Embarque  
marítimo

**RECIBIDORES**

SUPERMERCADOS  
CONSUMIDOR  
FINAL



**RIPE & EASY KIWI**

*Just scoop and eat*

**Sun Pacific Marketing 2012-2013**

# Punto de Venta y Publicidad



- Trade support includes
  - ✓ Trade Advertising
    - Outlining the consumer consumption and trade opportunities.
  - ✓ Secondary Display pieces
    - Communicate the Ripe & Easy™ consumer message
  - ✓ Pallet Display Module
    - ✓ Easy to build, high impact display that drive the consumer message and sales

## Secondary Display



## Pallet Display Module



Tell the Ripe & Easy<sup>™</sup> Story

## Wake Up The Sleeping Giant

**THE OPPORTUNITY**

- U.S. consumes nearly 120 MM lbs. of kiwi per year but pales in comparison to Europe or Canada.
- Consumers love kiwi that has been peeled and sliced for them but lack the time and inclination to prepare at home.
- Consumers are generally unaware that kiwi is a nutrition powerhouse, and that you simply scoop and eat ripe kiwi. No need to peel and slice!

**THE SOLUTION**

- Offer Ripe & Easy<sup>™</sup> consistent, ripe packs of kiwi.
- Educate consumers to simply halve and scoop.
- Communicate nutrition with package insert and our website [www.ripeandeasykiwi.com](http://www.ripeandeasykiwi.com).
- Tell the Ripe & Easy<sup>™</sup> kiwi story using clamshell packs, display ready cartons and display bases with photographs of Moms and kids scooping and enjoying halved kiwi.
- Build trust, offer Ripe & Easy<sup>™</sup> kiwi that is consistently ready to eat.

Single Family Display

Tri-Pack Source

Display Ready Cartons

© 2011-2012 9th Pacific Produce, CA 93104  
333-812-9977  
[www.ripeandeasykiwi.com](http://www.ripeandeasykiwi.com)

## Trade Advertising

# Información al consumidor



- 3"x 5" tri-fold inserted into clamshells that tells the **Ripe & Easy™** nutrition, storage, uses, and recipe story
- Periodically “spifes” inserted to promote the halve and scoop!



### Kiwi & Fresh Fruit Puff Pastries

2 pkg. (2 slices) frozen puff pastry, thawed  
3 lbs. flour  
1 egg beaten with 1/4 tsp. water  
1 tsp. sugar  
1/2 cup coarse cheese, softened  
1/2 cup sugar  
2 lbs. strongly flavored  
2 lbs. cream cheese  
2 cup frozen chopped topping, thawed

**Directions:**  
1. Heat oven to 400°F.  
2. Cut puff pastry into 12 squares, one sheet at a time. Place sheets together, top with 12.5" squares. With a knife, cut to squares 3 1/2" from edges and prick the centers with a fork. Set squares to baking sheet, cover and refrigerate 30 minutes. Preheat oven to 400°F. Brush pastry squares with egg wash then lightly seal the edges with sugar. Place in center of oven and bake for 30 minutes or until golden brown. Let cool.

Beat cream cheese, sugar, orange juice and 1/2 cup kiwi in a bowl. Fold in chopped topping. Spoon mixture into 12 squares and place in trays top. Brush fruit with melted preserves. Freeze tops with powdered sugar. Serve immediately or store and reheat up to 4 hours.

The beauty of Ripe & Easy Kiwi is that it's ready to eat when you are. The fruit will give to slight pressure. Then simply cut the kiwi in half and dig in with a spoon.

Ripe & Easy Kiwi can stay at room temperature for many days and can be refrigerated for weeks. Eat the average year to eat a daily serving of 2-4 lbs. What a delicious way to get your vitamins.

©2015 Sun Pacific Produce, CA 94100  
www.sunpacificfruit.com

### Get the Scoop

## Ripe & Easy

...to eat Kiwifruit

SUN PACIFIC

Kiwi, like many fruits, will eventually ripen on their own which can take a few days and even a couple of weeks.

But when you're ready for a snack and healthy meals for you or your family, you don't want to wait. And why should you? Introducing Sun Pacific's Ripe & Easy to you. It's perfect.

Ripe & Easy Kiwi are already perfectly ripe so you can enjoy their delicious, juicy and tangy flavor immediately.

So why wait? Simply cut in half and scoop with a spoon. Quick and easy. Award-winning Ripe & Easy...to eat. Only from Sun Pacific.

No matter how you slice it, Ripe & Easy Kiwi is a nutritional powerhouse - one of the most nutrient-dense fruits in the world.

- Kiwi is 90% water, the average fruit.
- Kiwi helps maintain heart health, regulate digestion and lower cholesterol.
- It contains natural antioxidants and phytochemicals that reduce cancer-causing mutations.
- Antioxidant Vitamin E fights free radicals.
- Magnesium supports nerve impulses in the brain.
- Kiwi is essential to red blood cell formation and reproduction.
- Kiwi also contains other natural nutrients such as fiber, calcium, iron and copper.

EACH SERVING OF RIFE & EASY KIWI CONTAINS THREE TIMES THE RIBOFLAVIN (B2), MORE POTASSIUM THAN A BANANA, AND MORE FIBER THAN A BOWL OF GRANOLA.

### Kiwi & Rice Pudding Dessert Martini

**Ingredients:**  
1/2 cup white rice  
3 cups whole milk  
1 cup heavy cream  
1 cup sugar  
1/2 tsp. salt  
1/2 cup kiwi extract

**Directions:**  
1. Cook rice in 1 1/2 cups water in a large sauce pan. Bring to a boil, then reduce heat to a simmer. Cook for 45 minutes or until rice is tender. Drain rice. Cook rice for 45 minutes - should be very soft and slushy. Remove milk from heat and stir in 1/2 cup of extract. Let cool to room temperature. Mix in 1/2 cup of sugar, 1/2 cup of heavy cream, 1/2 cup of kiwi extract. Stir well. Pour into martini glasses and garnish with kiwi slices.

# Kiwi Nutrition Insight

- Kiwi is a **nutritional powerhouse** with a remarkable story to tell
  - 1 serving (2 Kiwi) has:
    - Twice the RDA of **Vitamin C**
    - More **Potassium** than a banana
    - More **Fiber** than a bowl of bran cereal
    - More **antioxidant Vitamin E** than a serving of avocado
    - Only 45 calories, cholesterol free
    - **Great flavor** that kids love



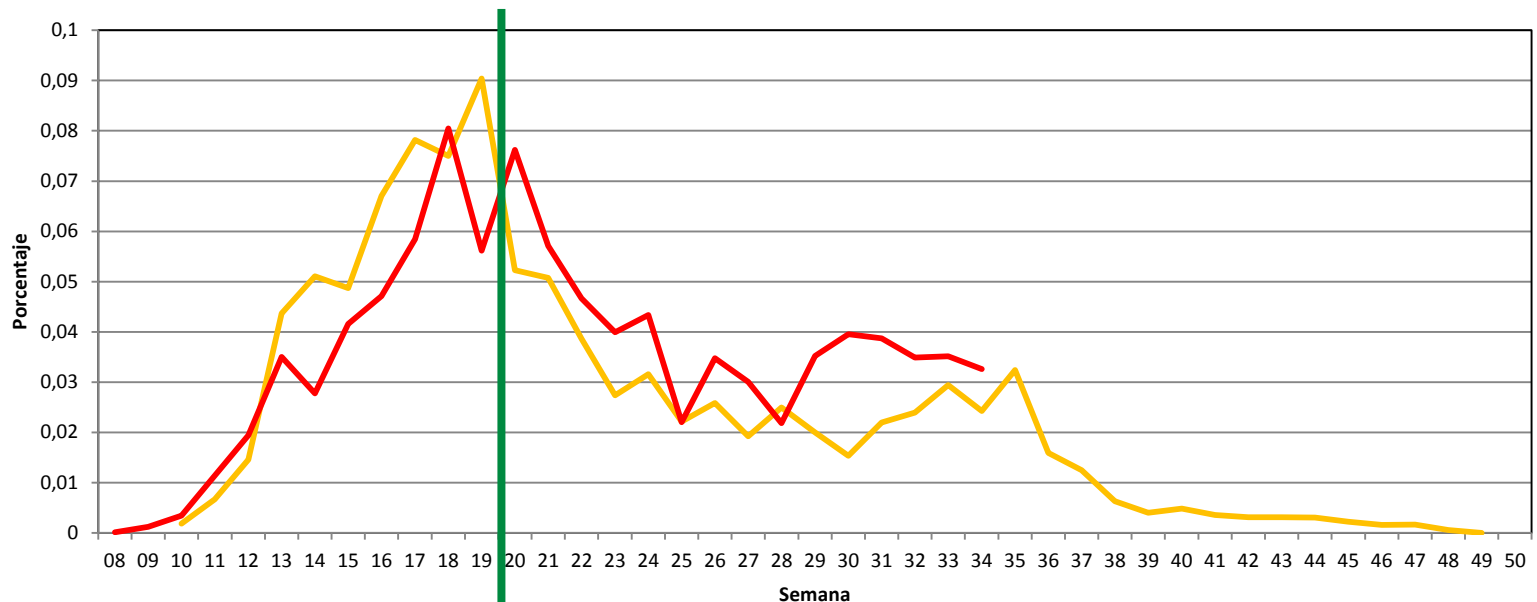


# Desafíos Comerciales



## 4. Distribución homogénea de los embarques

Porcentaje semanal de exportación de kiwi chileno a mercados de destino. 2012



Fuente: Expordata-ASOEX

**Semana 20, 14 al 20 de Mayo**

— 2009

— 2012

# Un Logro Concreto

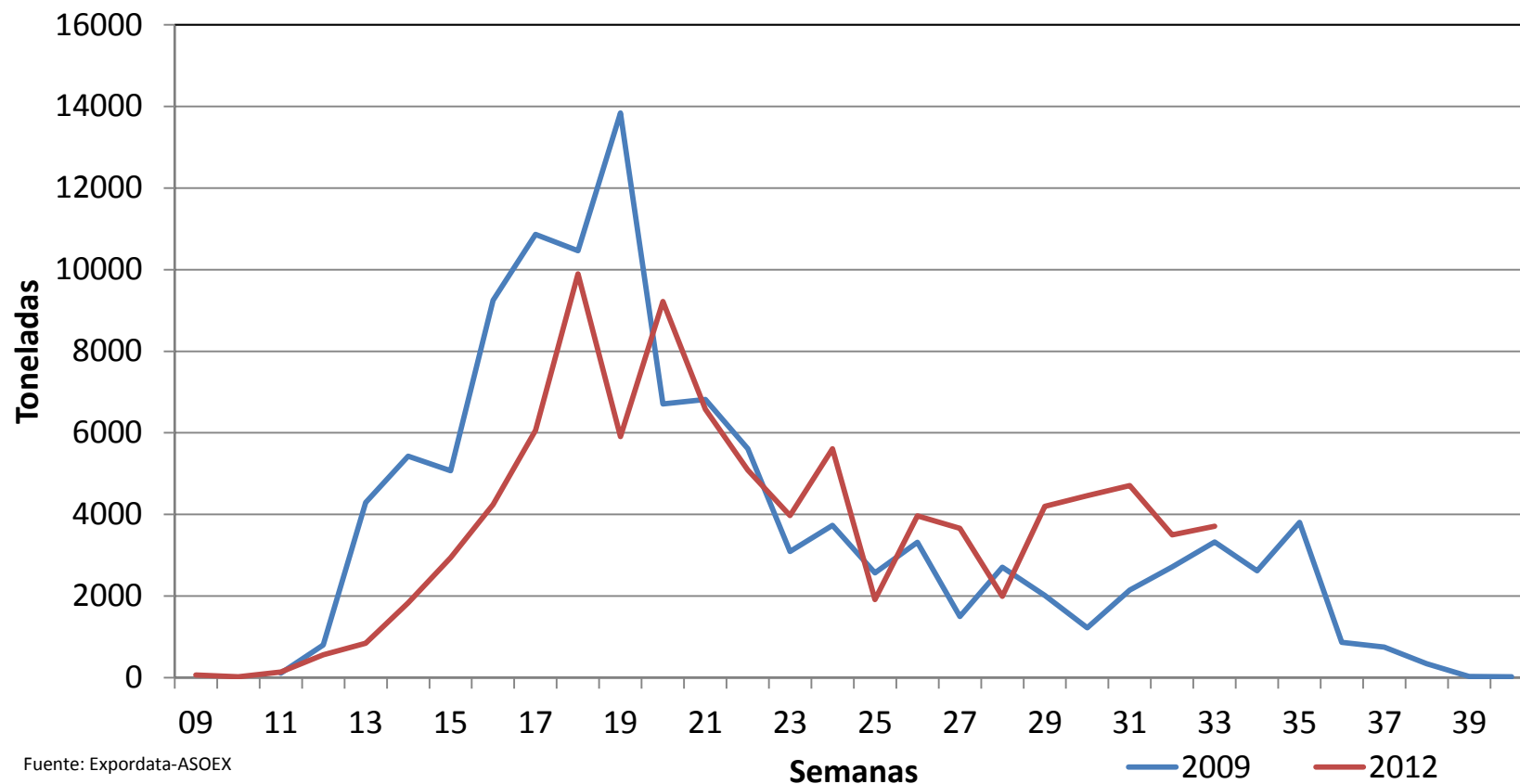


- Inicio temporada: stocks de Kiwi del Hemisferio Norte muy altos similares al 2009 con ventas muy lentas por la crisis.
- Se informó a la Industria de la necesidad de distribuir los embarques más homogéneamente durante la temporada chilena.
  - Infokiwi: estrategias recomendadas para la temporada.
  - Seminarios dirigidos a los comerciales

# Embarques a Europa 2009 v/s 2012



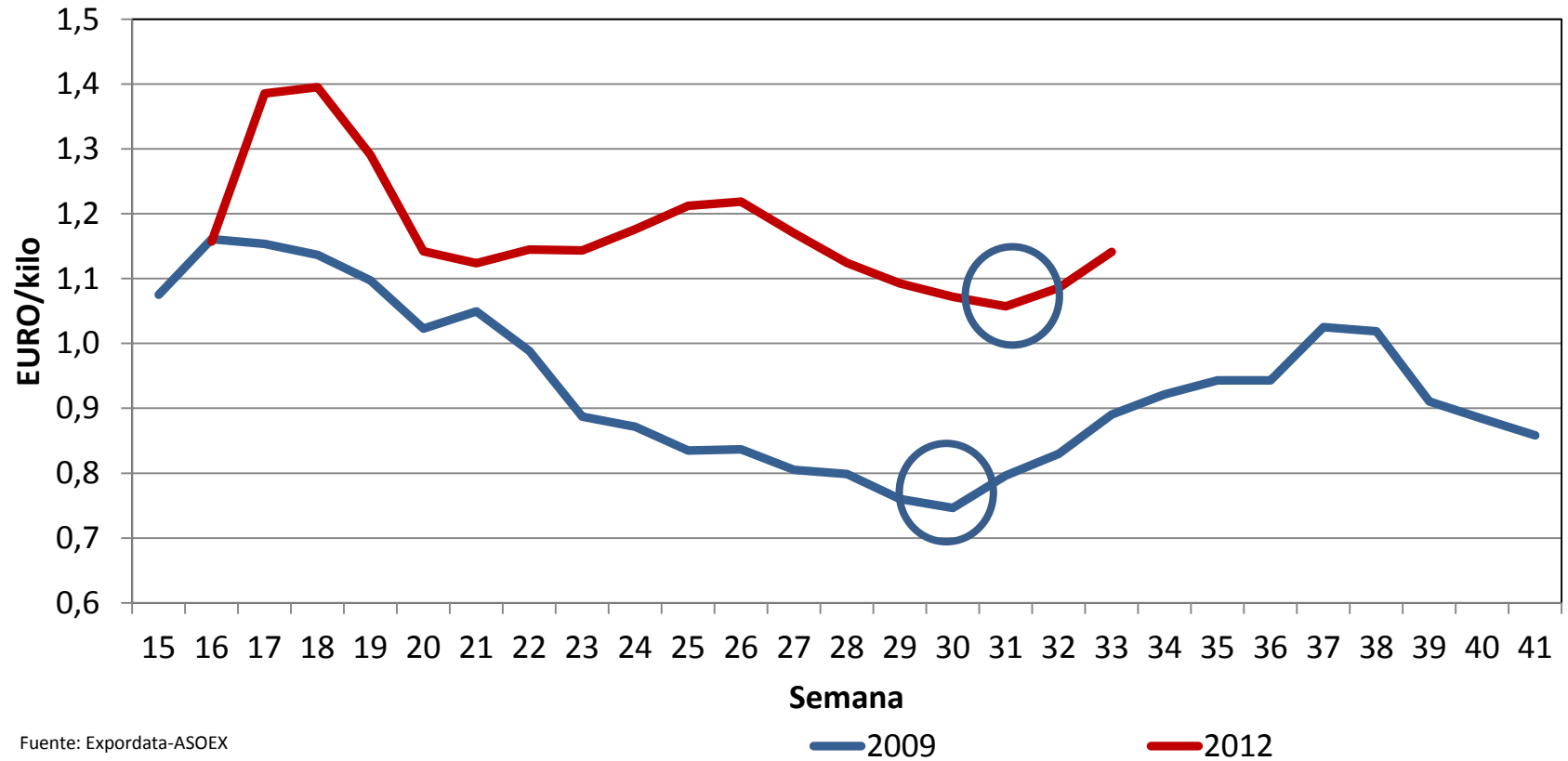
## SALIDAS DE KIWI CHILENO A EUROPA



Fuente: Expordata-ASOEX

# Precios de Venta en Euros 2009 v/s 2012

## PRECIOS FOT DE KIWI HAYWARD CHILENO EN EUROPA CONTINENTE



Fuente: Expordata-ASOEX

# Precio Mínimo de Venta



Un esfuerzo conjunto entre Productores y Exportadores

FedeFruta  
FEDERACIÓN DE PRODUCTORES DE FRUTA DE CHILE

ASOEX  
ASOCIACIÓN DE EXPORTADORES DE FRUTAS DE CHILE S.A.  
"Juntos, nuestra fruta vale más"

# Cadena de Valor



|                                   |             |              |
|-----------------------------------|-------------|--------------|
| <b>Precio de venta en Euros</b>   | <b>7,50</b> | <b>10,80</b> |
| Tipo de cambio                    | 1,25        | 1,25         |
| <b>Precio de venta en dólares</b> | <b>9,38</b> | <b>13,50</b> |

|                           |      |      |
|---------------------------|------|------|
| <b>Costos en destino</b>  |      |      |
| Comisión recibidor del 8% | 0,75 | 1,08 |
| Flete marítimo            | 2,90 | 2,90 |
| Gastos en destino         | 1,00 | 1,00 |

|                  |             |             |
|------------------|-------------|-------------|
| <b>FOB Chile</b> | <b>4,72</b> | <b>8,52</b> |
|------------------|-------------|-------------|

|                            |       |      |
|----------------------------|-------|------|
| <b>Costos en Origen</b>    |       |      |
| Comisión exportador del 8% | 0,38  | 0,68 |
| Materiales y servicios     | 4,75  | 4,75 |
| Libre por caja             | -0,40 | 3,09 |

|                                   |              |             |
|-----------------------------------|--------------|-------------|
| <b>Libre por kilo a productor</b> | <b>-0,04</b> | <b>0,31</b> |
|-----------------------------------|--------------|-------------|

## 5. Desafío Productivo, Comercial y de País

- FUMIGACIÓN BROMURO METHYLO
  - USA: fumigación obligatoria en destino, Chile prácticamente no se utiliza el system approach.
  - México: fumigación obligatoria en origen o destino.
  - Brasil: fumigación obligatoria en origen.
  - Japón: fumigación en destino frente a hallazgos de insectos cuarentenarios.

# Problemas



Un esfuerzo conjunto entre Productores y Exportadores





# Problemas



Un esfuerzo conjunto entre Productores y Exportadores

# Problemas



# Problemas



Un esfuerzo conjunto entre Productores y Exportadores

# Algunos mensajes de nuestros recibidores



# Desde UK: Matthew Churchill Tecnólogo Senior de Greencell

greencell

## The UK Retailers



# Waitrose



Sainsbury's  
*Try something new today*



TESCO  
*Every little helps*



ASDA  
part of the WAL-MART family



M  
MORRISONS



The co-operative



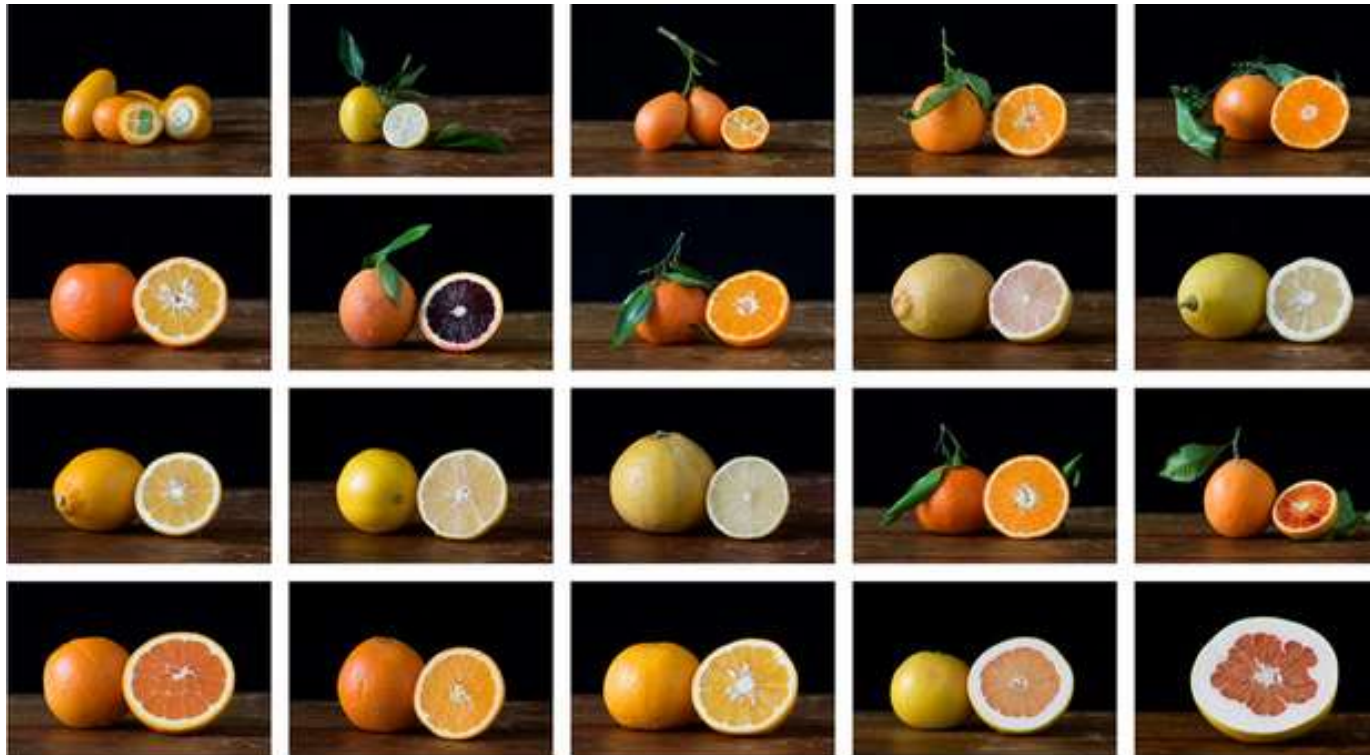
entre Pro res

Fru



- Sales of Kiwi fruit are at best static and across many areas in decline.
- Kiwi has become very much a commoditised fruit in the last 5 to 10 years.
- Kiwi is lacking behind other fruit categories with regards to penetration and growth.
- Flavour consistency can often be disappointing – very acidic resulting in poor repeat purchase trends.
- Internal condition can be erratic and inconsistent – poor, bladdery condition internally with firm hard cores.
- Perception that New Zealand Kiwi fruit is the best and consistent in high quality attributes.
- Little varietal development however priorities must be PSA resistant cultivars.
- The fruit can appear uninspiring and needs to once again become an exciting, ‘must have’ purchase.
- Per Capita consumption is in decline.
- Little promotion of the Kiwi fruits key USP’s – ‘unique selling points’ – attractive internal appearance, sweet flavour, flavour profiles and health benefits.

- Consumers see little change in development of kiwi varieties.





- More needs to be done to promote this fruit.
- The Kiwi has many exciting features to consumers that are not fully exploited.
- Many people do not understand or realise how attractive the fruit is internally.
- People do not understand the health benefits.
- People do not know what else can be done with a kiwi promote recipe ideas.





# Learning from other fruits.....

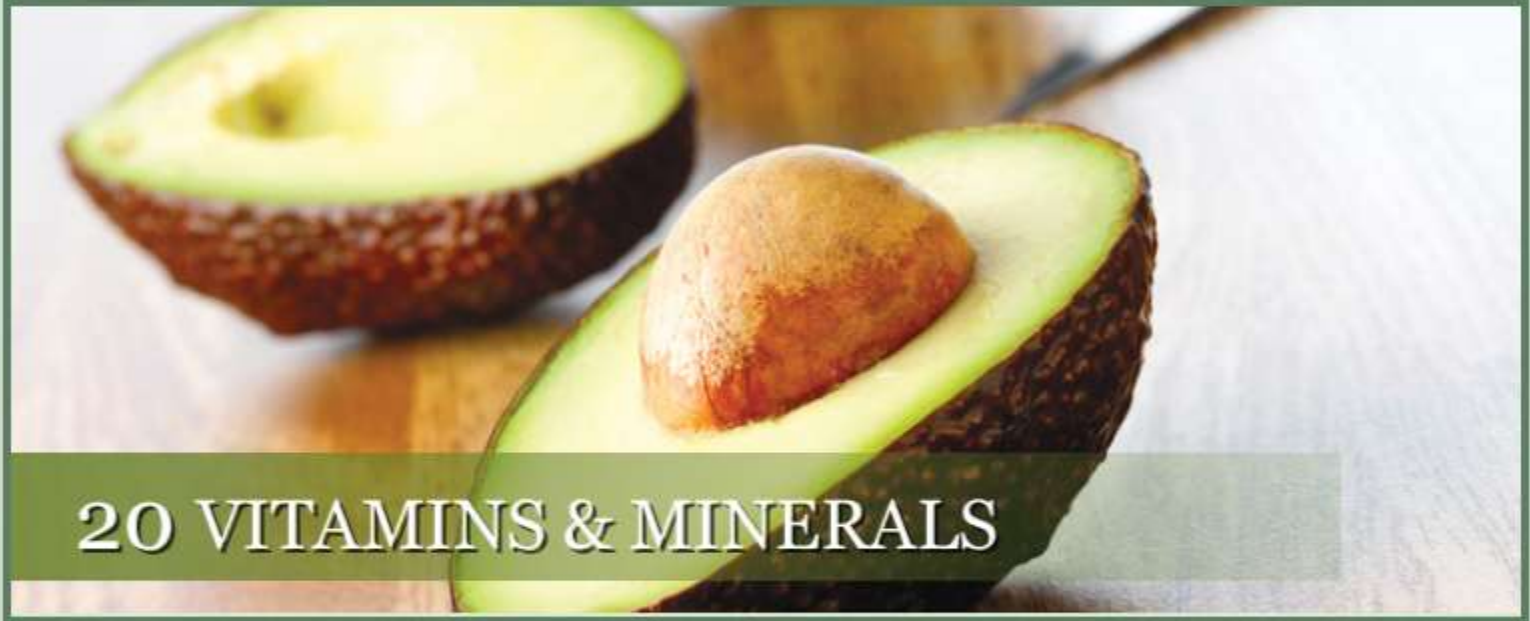
greencell

Consumer education and information is key to drive sales

Member Extranet Log-in



- Home
- Chilean Avocados
- Recipes
- About Us
- Nutrition
- Retail
- Foodservice
- Press Room



## 20 VITAMINS & MINERALS

### CHILEAN AVOCADO RECIPES

Make everyday meals sensational with Chilean Hass Avocados.

**GET RECIPES** ▶



### CHECK OUT THIS YEAR'S TAILGATER OF THE WEEK WINNERS THANK YOU FOR PLAYING!

### CHILEAN AVOCADO LOVERS CLUB

Check out this year's winners!

CHILEAN AVOCADO

# Desde Korea: Hee Jeung Kim

## Gerente Comercial y Socia de NZO



### Zespri Kiwifruit is facing difficulties in terms of production and consumption.

- Difficulty in production

- Due to PSA, Zespri Gold kiwifruit production is decreased.
- It appears that main volume of Hort 16A is going to be transferred to G3.
  - In 2013 ZESPRI Gold production volume will show further decrease.
  - Consumer reaction on G3, the new variety of NZ Gold Kiwifruit, is not promising as they are not used to the new taste.

- Difficulty in Consumption

- With decreased supply volume, Zespri increase its price accordingly. It drove the serious price barrier for consumption.
  - In major retails show 10~25% of minus growth in Kiwifruit sales.
  - Launch of Golden from Chile made harder for ZESPRI's sales especially through major retails.
- Nevertheless, we need to keep in mind that ZESPRI is still the market leader.

# Chilean Kiwifruit in coming years



- Chilean kiwifruit will be able to make continuous growth as the market leader ZESPRI is struggling from low production on Hort 16A, changing of variety and wrong price strategy.
- When economy is going through tough time, the most importable factor for marketing is “Price”.
  - Chilean Kiwifruit will have further decrease in import duty having strong competing point.
- In conclusion, outside environment for Chilean Kiwifruit is very positive.
  - The biggest risk will come from amongst Chilean Kiwifruit exporters.
  - It means if Chilean Kiwifruit exporters can cooperative each other, the future of Kiwifruit market is widely open for Chile.

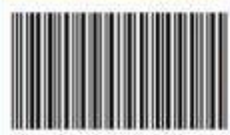
# Quality Management



- The single most critical issue for Chilean kiwifruit is **“Hard Core”**.
  - Conduct joint research to minimize Hard- Core.
  - Korean consumers are specifically sensitive on hard-core issue.
- **Set up a strong quality criteria for Korea** export Kiwifruit
  - To supply to Korea, the kiwifruit must meet a set standard.
  - **In general, quality of Chilean kiwifruit is getting better,**
  - **However, early picked kiwifruit is still an issue.**
    - **In Korea they are called as “Stone” not a fruit.**



Jingold



8809226259214

오리지널 · 키위 브랜드



enza  
GREEN KIWI



원산지: 칠레 KSAISO 9001인증업체 인증번호: 030-0205 제철기간: 12월 15일 ~ 6월 15일  
판매처: 키위(엔젠포지드) 031-945-7831 www.nozochard.com 02-763-0947 (농산물) 500-7-

It's New 맛있는 골드키위

Jingold<sup>TM</sup>  
진골드

con il contributo di Camera di Commercio di Forlì-Cesena



Un esfuerzo conjunto entre Productores y Exportadores

Fede

FEDERAZIONE COOPERATIVE PRODUTTRICI

"Juntos, nuestra fruta vale más"

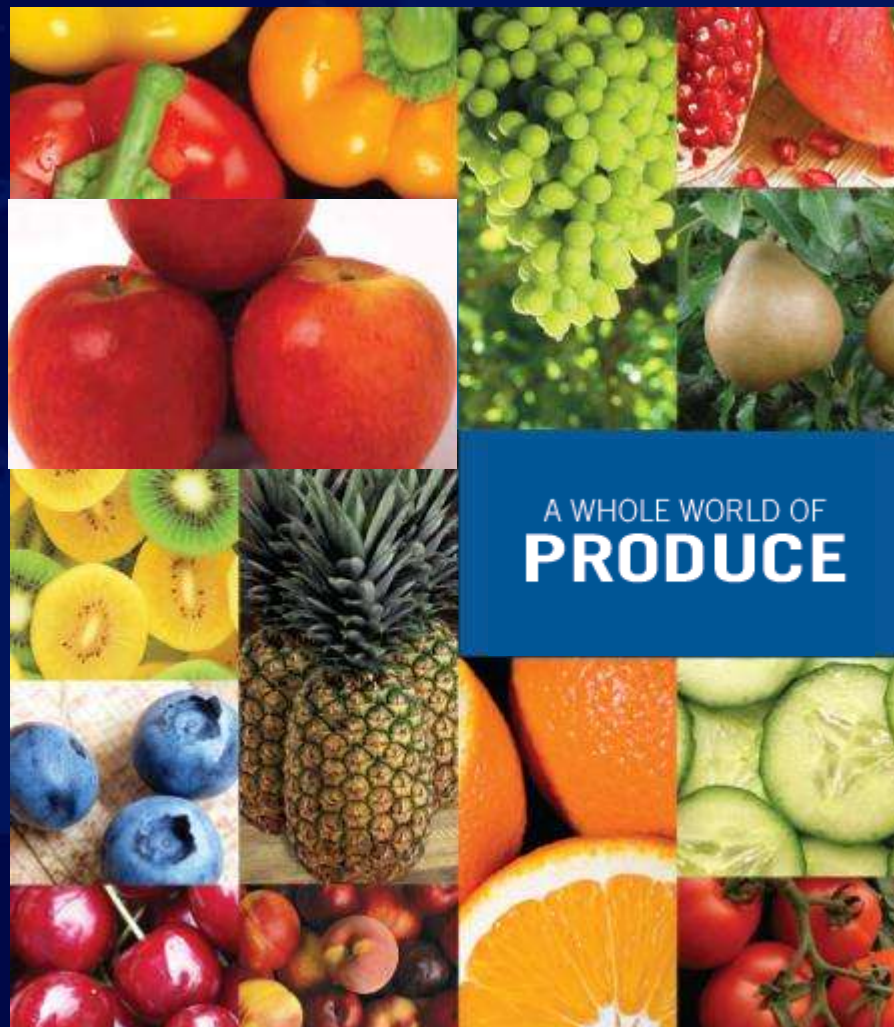
Desde USA: Steve Woodyear  
Kiwi Manager, Oppenheimer



*expect the*

[ **WORLD** ]

*from us*



**Chilean Kiwifruit Insights**

**August, 2012**



# The U.S. Retail Landscape



In 2011, retail sales of conventional kiwifruit (not including club stores like Walmart, Sam's Club, Costco, BJ's) increased 9%.

- Organic kiwifruit sales **rose 10%**
- Fruit sales in volume across all other categories **reduced 4%** on average.







# Challenges for Chilean Kiwifruit



- **A general lack of CONSISTENCY in the following areas:**
  - **Fruit quality (eating and visual)**
  - **Volume shipped to the market per week to each coast**
  - Box count per pallet
  - Weight per box
  - **Lack of promotion**
    - Kiwi needs promotion to sell. Without promotions to support retail sell through kiwi drops off the radar for consumers
- The requirement of **fumigation on arrival impacts storage and shelf life.**
- Fruit size – the market prefers larger sizes than Chile can naturally deliver.

**“When in doubt, do not ship.” North America is an expensive place to do business. It is far cheaper to resolve a problem with quality or condition at home than in the market, where impact on grower returns can be considerable.**



# Opportunities for Growth



1. Standard volume fill pack: 9 kg or 10 kg

**2. Continue to improve standards and consistency of fruit across all shippers**

3. **Better coordination of shipping volumes** by market and by U.S. coast, i.e.

*In weeks 17-21 2012, volumes shipped to the US increased 317% to the East Coast and 80% to the West Coast. The market cannot absorb that much volume over such a short period of time. As a result, significant damage was done to the value of the Chilean kiwifruit market in the U.S.*

4. Maximize the box count per pallet. Box counts vary anywhere between 112 -128 per pallet. With marine cargo, and many of the market based costs on per pallet rates this impacts grower return.

5. **New variety development** – True early varieties, naturally larger fruit, sweeter, gold, red, Arguta other?

6. **Promotional funding.**

7. Continued industry-to-government efforts to assure uninterrupted access.

## GUIAR

Obtención sabor, resolver columela dura...

Incentivar la producción de alta materia seca



## SEGREGACIÓN

Productor, zona, mercados

## INVOLUCRAMIENTO

Desde Producción a Consumidor

DISTRIBUCIÓN HOMOGÉNEA  
DE EMBARQUES

## FUMIGACIÓN

Usar system approach para USA

## NUEVAS VARIEDADES

## RECIBIDORES ESPECIALISTAS

Madurar – Promocionar – Informar  
al consumidor

# ¡UN KIWI RICO DE MARZO A OCTUBRE!



## ¡GRACIAS!