

FRESH FOCUS

SPAIN 2018

THE ANNUAL PUBLICATION FROM EUROFRUIT, ASIAFRUIT AND AMERICAFRUIT



EXPORT
WINNERS



The art of innovation

Fresh ideas fuel renaissance
in Spanish horticulture



FUTURE OF
THE AVOCADO

FRUIT ATTRACTION

CITRUS

TROPICALS

BERRIES

POSTHARVEST

STONEFRUIT

FRUITNET

MEDIA INTERNATIONAL

Maintaining the momentum



A surge in innovation and a can-do attitude are transforming Spanish horticulture

Maura Maxwell

Maura Maxwell **Editor**



his year marks the 15th edition of FRESH FOCUS SPAIN and plenty has changed since 2002. Back then the industry was more inward looking, concerned with sliding profitability, growing competition from third countries like Morocco, and stalling consumption.

Fifteen years on and despite facing the same challenges the mood is strikingly different. The industry is abuzz with fresh ideas and the scale of innovation on display at this year's Fruit Attraction points towards a sector that has taken charge of its own destiny.

These pages are packed with fresh ideas – whether it's new offerings for the convenience market, product launches, technological advances or developments in postharvest, packaging and machinery, there's an awful lot to feel positive about.

This has come to the attention of venture capitalists. Moyca and Martinavarro are just two of the companies to have caught the eye of the large funds and a number are reportedly eyeing Planasa as their next potential target.

Of course, that's not to say that the old problems have miraculously disappeared. Sectors like stonefruit are still crying out for structural reform and market diversification remains a tough nut to crack.

In an interview with Miguel Arias Cañete in the inaugural issue, the then agriculture minister highlighted the need for Spain to open up new export markets beyond Europe. Since then, companies have made inroads in Asia, Africa, South America and the Middle East – albeit at a slower pace than hoped – but the EU still accounts for almost 93 per cent of Spain's total shipments.

It would be a shame if the port workers' dispute, which has been rumbling on for several months, was to scupper the progress made by exporters in key markets such as China.

In the meantime, let's raise a glass to 2018 and hope that the momentum the industry has built up can be maintained over the coming year. ●

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FRESH FOCUS

SPAIN 2018

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FRUITNET MEDIA INTERNATIONAL

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The power of attraction

MADRID—Michael Barker talks to Raúl Calleja, director of Fruit Attraction, about what visitors to this year's fair can expect.

by Michael Barker

What are the major issues facing the Spanish fruit and vegetable sector generally at present?

Raúl Calleja: Spain occupies first place in the worldwide ranking of fruit and vegetable exports. It produces 22m tonnes of fresh fruits and vegetables, of which approximately 60 per cent is exported and the rest sold internally. Similarly, the sector generates more than 400,000 jobs.

Maintaining this position requires continual investment in modernising farms and improving production processes to further strengthen the sector and ensure its future sustainability. It is also essential to diversify

our export markets and facilitate the lifting of phytosanitary barriers that exist in many countries. Last year the Chinese market was opened to Spanish stonefruit exports, and we want to continue working with the authorities along these lines in order to gain access to countries with a large consumption potential for other Spanish fruits and vegetables.

We must also look at how we can accelerate the process of innovation by boosting operation-

al funds and programmes aimed mainly at financing new investments in farms. Another priority is to improve crisis and emergency management by reforming EU regulations on withdrawal prices. This would help maintain sustainable prices and alleviate the negative effect of the Russian veto. Before the ban came into effect in 2014, Russia was the number one non-EU market for Spanish fruits and vegetables and despite our best efforts it has not been possible to offset the volumes we sent to this country with exports to new markets.

Given the focus on healthy eating at the moment, how big an opportunity is this for the fruit and vegetable sector to increase sales and consumption?

RC: Like Fruit Attraction, it is an opportunity that must be seized. Through this event we're seeking, among other things, to showcase the diversity and quality of fresh

ABOVE—The 2017 edition of Fruit Attraction will be the biggest yet
ABOVE RIGHT—Raúl Calleja: several new elements have been added to the show



fruits and vegetables, and highlight the benefits of including them in your diet, in order to boost consumption levels. Nowhere is this better demonstrated than in our Fruit Fusion gastronomic space, which provides a unique opportunity for producers to promote their products internationally through product tastings and cooking demonstrations featuring renowned chefs.

How are preparations going for Fruit Attraction this year?

RC: Very well. The 2017 edition of Fruit Attraction will be the biggest yet, with more than 1,500 exhibiting companies and more than 60,000 professional visitors from 110 countries worldwide. These figures demonstrate the international fruit and vegetable market's confidence in and commitment to this trade show, which was ultimately created by and for the sector.

Are there any new features to look out for?

RC: This year we have incorporated a number of new features in the trade show with the aim of continuing to offer companies the most effective marketing tool. These include the Guest Importer Market, which this year will be Brazil and China. The objective is to carry out institutional, market and commercial actions during the trade show that will encourage the growth and development of trade relations between China and Brazil and the countries of the European Union. We have invited government delegations and the main players from these two countries to the fair and expect there will be around 200 sellers, purchasing managers, traders, importers and retailers from Brazil and China.

Another new feature is the Smart Agro space, which aims to drive digital transformation and technological innovation at every level of the supply chain – production, processing, distribution and marketing – with the aim of making production more efficient with higher levels of quality and control and a lower

environmental impact.

It will feature more than 1,000m² of space, with practical talks and workshops on topics ranging from cultivation to consumer sales, such as apps, drones, software/hardware, IoT, big data, ERPs, monitoring, automation, robotics etc.

We've also incorporated the Nuts Hub, focused on dried fruit and nuts, which will allow all companies in this segment to present their products to the industry.

Meanwhile, FreshN'Star is a new programme containing the entire directory of participating companies, workshops and product displays of the two star products of this year's edition: lettuce and pomegranates. As part of this, Proexport will be holding its Salad Attraction conference.

On this occasion, we have also incorporated the Lanzadera Programme, a new exhibition space in ready2exhibit format, with 6m² spaces at a very economical cost. It is effectively designed to give visibility to new companies in the sector in order to emphasise entrepreneurship and young businesspeople. Along with all of these new features, we will continue to promote the Organic Hub, dedicated to companies specialising in organically grown produce, as well as Pasarela Innova, Fora Innova and Fruit Fusion, all accompanied by a complete and very strong programme of technical workshops.

In a busy calendar of events, what makes Fruit Attraction a must-attend show?

RC: Fruit Attraction offers infinite possibilities. It's a very dynamic event held in a fantastic city, Madrid, and provides a true commercial, business and international networking environment for the trade.

The success of the event is down to three factors. Firstly the synergy between organisers Ifema and Fepex which has enabled us to develop a project tailored to the needs of the

sector. Secondly, the month in which Fruit Attraction is held is a key month for planning campaigns and closing supply agreements between suppliers and fruit and vegetable traders for the entire winter. Thirdly, the fair has the power to attract customers from all over the world, including many high calibre visitors like supermarket buyers.

How do you see the relationship between Britain and Spain developing post-Brexit?

RC: This is unquestionably one of the greatest challenges of the sector in Europe right now. Let's not forget that the UK is the third largest market for Spanish exports and one that, moreover, recorded significant growth last year – 14 per cent in value and 12 per cent in volume. Logically there is concern, as indicated earlier by Fepex, which considers the maintenance of a single market without borders between the European Union and the UK to be high priority.

The aim is not only to preserve access to this country but also to maintain the homogeneity of legislation, given that progressive distancing from community rules could lead to phytosanitary barriers and distortions of competition.

What impact has the Brexit situation had on Spanish produce exports so far?

RC: The reality is that Spanish exports to the UK have stagnated in the first quarter of the year due to uncertainty within the sector regarding the negotiations for the UK's departure from the EU, the third round of which recently concluded without any major advances being made.

While Spanish fruit and vegetable exports to this country recorded the same value as in the same period of 2016, with €1.054bn, the volume has decreased by 1 per cent, to a total of 849.4m tonnes. ●

PREVIEW
—Exhibitors

RIGHT—More than 1,500 companies will take part in this year's show

Innovation takes centre stage in Madrid

MADRID—New product launches, anniversaries and a chance to catch up with old friends. Fresh Focus Spain picks out some of the highlights at this year's Fruit Attraction.

by Maura Maxwell



Eurobanan

Fruit Attraction will serve as the launch pad for Eurobanan's new Avocado Light. With 30 per cent less fat than other varieties, Ramón Rey (below) believes the latest addition to the produce giant's Isla Bonita tropical range will take the market by storm. The company will also showcase its new super juice range. Full story on p18.



Zespri

Zespri is the world's biggest kiwifruit marketer, accounting for 30 per cent of the volume traded globally and 45 per cent of sales in Spain. The company celebrates its 20th anniversary this year with a brand new stand offering plenty of opportunities for visitor participation, from augmented reality videos to product tastings and the chance to make their own kiwifruit smoothies with the Zespri smoothiebike.



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Unica

With a range of more than 100 products and an annual production volume of 270,000 tonnes, Unica Group is a heavyweight in the Spanish produce industry. In addition to citrus and stonefruit, the company is launching its new range of dried fruit and vegetable snacks at Fruit Attraction. "We are continually expanding our range through the introduction of new products and packaging formats, especially in the snacking sector," says Diego Calderón.

Smurfit Kappa

Smurfit Kappa's Octagonal L box will take centre stage at the trade fair. Specially developed for the fruit and vegetable industry, the box has a capacity of 120kg and 180kg and is designed to withstand long transit times. Its strong vertical resistance makes it easier to stack and it can be folded and mounted by a single person.



Westfalia

Multinational fresh produce supplier Westfalia will be exhibiting at Fruit Attraction for the first time, showcasing its global avocado marketing and supply chain capabilities. The company says its new production facility in Portugal, Westfalia Fruit Iberia, recently completed its 2017 phase of plantings and will eventually become Europe's biggest avocado orchard.



Anecoop

Fruit Attraction marks the official launch of Anecoop's brand new convenience label, Ysi. The group recently established a new company, Janus Fruit, to handle its growing range of fresh-cut and snack products. The company also celebrated the 25th anniversary of its much-loved Bouquet seedless watermelons this year. "Visitors to the stand will also have the opportunity to sample freshly squeezed pomegranate juice," says commercial director Miguel Abril. Full story on p12.



VI.P Val Venosta

Italian apple marketer VI.P Val Venosta plans to hold an informal breakfast meeting with the media to discuss the 2016/17 season and to look ahead to its new campaign which, despite the anticipated reduction in volumes due to spring frost, will continue to put Spain very much at the centre of its commercial export strategy. With around ten per cent of the cooperative's average 350,000 tonnes of apples sold in Italy each season, Spain continues to be an important outlet for Val Venosta-branded fruit. Full story on p25.



COMPARTIMOS HORIZONTES



ABOVE—Fruit Attraction is the ideal time to plan programmes for the new season

Auvergne-Rhône-Alpes

The French region of Auvergne-Rhône-Alpes and its 30,000ha of production area will be represented for the first time at Fruit Attraction this year. Headlined by its 'Region of Taste' brand, the stand will feature the Auvergne-Rhône-Alpes Gourmand Committee, Fruits Strategic Committee and three companies – Comptoir Rhodanien, Concept Fruits and Coopenoix.

Cuna de Platero

Madrid will serve as the launch pad for berry specialist Cuna de Platero's brand new slogan: 'From our fields to you' encompasses the cooperative's ethos that the grower is at the heart of everything it does. "Our customers know that our brand is synonymous with quality and freshness because they are buying berries direct from the field," says managing director Juan Bañez. Full story on p26.



Induser

Induser's range of packing products, which includes its multi-head weighers, are ultra-precise and faster and more adaptable than ever according to sales and export director Pedro Martínez "The machines work with all types of packaging format as we strive to give our customers the opportunity to widen their packaging options in the simplest and most cost effective way possible," he says. Full story on p46.



"Fruit Attraction allows us to strengthen our relationships with current partners and make contact with new ones"

Valagro

Valagro's biostimulants and specialty nutrients are sold in more than 80 countries via the group's 13 subsidiaries. In addition to its production site in Italy, the company has six other facilities including its most recent in Pirassununga, Brazil.

Extenda

Around 200 companies will take part in this year's Fruit Attraction under the umbrella of Extenda, the trade promotion agency for Andalucía. Representing 42 per cent of the national total, the region leads the way in Spanish exports of fruit and vegetables. Exports for the first six months of 2017 totalled €3,544bn, a 12.5 per cent increase over the same period of the previous year.

Aartsenfruit

With a turnover of €200m and a supply base of more than 40 countries, Breda-based Aartsenfruit describes itself as true international gateway for fruit and vegetables. "We will be exhibiting at Fruit Attraction to strengthen our relationships with our current partners and make contact with new suppliers," says Brigitte van der Pluym. "The market is always in motion and new opportunities and possibilities spring up every day. We like to lead the way in this area."

Fruits de Ponet

"Fruit Attraction gives us a chance to meet with our customers and analyse the stonefruit campaign and exchange ideas about how we can make improvements for the next season," says Santi Bonet. "It is also the ideal platform from which to promote our growing autumn and winter fruit offering, which is growing steadily under the company's 'Good fruit, 365 days a year' strategy."



ABOVE & RIGHT—Some of the industry's best-known brands will be showcased

SAT Royal

The priority for SAT Royal at Fruit Attraction is to get together with clients to plan for the forthcoming berry campaign. "At this year's show we will also be presenting some new raspberry and blueberry varieties," says Diego Pozancos. "Having undergone rigorous testing we are about to launch them commercially and are confident they will get a favourable reception from the market." Full story on p42.



Verdifresh

Sun&Veg's smoothies (below) are the latest addition to Verdifresh's growing range. The 100 per cent natural vegetable and fruit smoothies incorporate special ingredients including matcha tea, hemp seeds, agave and guarana and come in 250ml pouches that are flexible and lightweight, making them an ideal choice for on-the-go consumers.



Spanish growers and exporters pride themselves on the advancements they have made in accessing new markets

Frutaria

Exporting to 55 countries including China, Brazil, South Africa and Finland, Spain's Frutaria prides itself on being able to reach the four corners of the globe, says Carlos Echeste. The company's oranges are gaining a firm foothold in the Chinese market and is confident that the import protocol for Spanish table grapes will be in place by 2018.

Decco

Decco has been providing post-harvest solutions to the Spanish market since 1967 and will be celebrating its 50th anniversary with customers and collaborators at Fruit Attraction.



ABOVE—The fair will showcase the quality and diversity of the international produce arena

Bejo

Bejo's Christiaan Reynders says he believes seed companies play a vital role in bringing new flavours and experiences to consumers in order to help raise consumption levels. The company is presenting several new varieties of lettuce, green bean, cauliflower, cabbage, cucumber, asparagus, carrot and courgettes as well as a new range of baby leaf lettuce for the convenience sector which have a high disease resistance and has been adapted to suit growing conditions at different stages of the year.





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REPORT

—Anecoop

Anecoop, Spain's biggest cooperative grouping, had much to celebrate in 2017. Not only was it a year in which to take stock of what it had achieved so far in its 40-year history, but also a chance to lay the foundations for the coming decades of growth.

The creation of two new companies, Exóticos del Sur and Janus Fruit, are a case in point. The former has been set up to market Anecoop's expanding line of greenhouse-grown tropical fruits, principally papayas, while the latter encompasses the group's fast-growing fresh-cut and snack offering. To underpin its ambitions in this sector, the company has created a new convenience brand, Ysi de Bouquet, for the national market which is being officially unveiled at this year's Fruit Attraction.

"The formation of these two companies reinforces our commitment to develop the kind of new product lines that our customers are demanding," Anecoop's new commercial director Miguel Abril tells FRESH FOCUS SPAIN.

Janus Fruit's offer comprises 40 different fruit-based products ranging from 80g to 700g formats, as well as several vegetable snack packs, with several other products are currently under development. The entire range is packed using recyclable packaging and the company is working on the development of a new line of PLA biodegradable plastic.

While the fresh-cut trend has been somewhat slower to take off in Spain than elsewhere in Europe, there are signs that it is starting to gather momentum. In the past year alone, sales of Anecoop's fruit pots topped 800,000.



Anecoop taps into convenience trend

VALENCIA—The launch of its brand new convenience label, Ysi de Bouquet, clearly signals the company's ambitions in the fresh-cut arena.

by Maura Maxwell

"As well as being about convenience, these products address a very serious concern: namely, offering new ways of consuming fruits and vegetables in order to halt the slide in consumption," Abril says.

Meanwhile, Anecoop's exotics business, Exóticos del Sur, is going from strength to strength. Thirty-five producers have joined the group in the past year and production is expected to reach 1,500 tonnes this season. This has given rise to the development of new sales channels, including a line of sliced papayas for the horeca industry, and next season the company plans to open a new packhouse dedicated exclusively to papayas.

Elsewhere, Abril highlights the progress made by the group's organics subsidiary, Solagora, which has also seen sales rise steadily over the past year.

He is keen to point out, however, that new product lines are not the sole focus of the group going for-

Anecoop currently exports to 69 countries and is seeking further market diversification, according to Miguel Abril.

"The geopolitical landscape is very complex right now but in spite of this we have seen a notable increase in exports over the past two years, while also growing in the domestic market," he says. "As well as consolidating our position in existing export markets we continue to open up new ones."

Eastern Europe, in particular, has assumed a position of key strategic importance for the group, which has branches in four countries – the Czech Republic, Slovakia, Poland and Russia. With the exception of Russia, each market has seen strong growth in recent years.

Anecoop is made up of around 27,000 producers organised into 68 cooperatives located in four autonomous communities. In 2015/16 sales increased by 10.7 per cent in value and 4.8 per cent in volume, reaching €639m and 782,000 tonnes respectively. Including Anecoop's overseas divisions, overall sales reached €802m and 930,000 tonnes.

ward. "Naturally, we want to keep growing and improving in our core products – citrus, vegetables, stonefruit, melons and watermelons – where our focus is on improving quality, taste and food safety," he says. ●

TOP—Miguel Abril says progress has been made on many fronts in 2017



Anecoop has been part of your world for the last 40 years. Customers, cooperatives, farmers, employees, suppliers and consumers who have all worked together in over 70 countries to grow **a company which, above everything else, looks after people.**

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As producers, our fruit and vegetables are the culmination of a working model that is based on four cornerstones: healthy eating, food safety, the environment and the social economy.

Growing these values has enabled us to reach different milestones, such as becoming **the world's leading kaki producer**. Our **Bouquet Persimon®** brand is synonymous with quality, innovation and food safety on the international market.



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CITRUS

INTERVIEW

—Mateu Chilet, Citrus Genesis International



Cream of the crop

VALENCIA—Varietal development in the easy peeler category is hotting up. Mateu Chilet, business development manager at Citrus Genesis International, provides an overview of what consumers can expect to see on supermarket shelves in the coming years.

by Maura Maxwell



Could you provide a brief overview of your current stable of new citrus varieties, and what stage they have reached in their commercial development?

Mateu Chilet: Octubrina is a precocious clementine variety that delivers high yields year after year. Despite being quite a new cultivar, it has already caught the interest of growers in many countries in both hemi-

spheres such as Spain, Italy, Turkey, Israel, the US, South Africa, Peru, Uruguay and Chile. Plantings have reached about 300ha in Spain alone. So far it has received very positive feedback from retail customers in the UK and we plan to develop sales in other markets very soon.

Cultifort, meanwhile, is another clementine that offers advantag-

es for both growers and customers: trees are very productive and the variety has an attractive reddish colour, high Brix and juice content, melting texture and succulent taste. It has reached commercial production in Spain and will soon be produced in different countries such as Italy, Turkey, South Africa, Uruguay and Peru.

Clemenlate is a late natural mutation of Clemenules that allows growers to extend the season for another four weeks from January. It's now ending the experimental phase to which we submit all





CLOCKWISE FROM
LEFT—New
offerings Belabela,
Clemenlate,
Cambria and
Octubrina

Part of AMC Group, Citrus Genesis International was set up in 2009 and brings together a global network of growers and the most successful international breeding programmes to develop new high quality citrus varieties.



varieties before releasing them for commercial purposes and it will be ready for launch in the mid-term.

Then we have Belabela, the newest true-to-type satsuma available in the market. It was launched in 2013 and there are now over 400ha under production. It is currently available from Spain and last year the first volumes were delivered from Peru. South Africa and Turkey are next in line for development.

Finally, there is Cambria which is also growing strongly. The variety hails from South Africa and

the first trees were planted in Spain in 2011. Now, there are around 400ha of production in Spain, Israel and Morocco. Up to 1,000ha of plantings have been authorised in the Mediterranean countries – news that has been very well received by growers, and orders have been flooding in.

So which ones are enjoying the most success commercially?

MC: Octubrina, along with Belabela and Cambria are creating quite a buzz on the market. These three varieties are following the path opened up by Orri and Spring Sunshine mandarins.

I understand that Octubrina is sold exclusively by Tesco in the UK. Are you planning to adopt this strategy in other countries?

MC: So far, there is only enough production to Tesco. As volumes grow in the future, the variety will arrive to other markets too.

What key trends are you seeing in the citrus market right now? What are consumers looking for specifically when it comes to new varieties?

MC: The current tendencies are mainly focused on seedless easy-to-peel cultivars that offer rich and distinctive flavours, freshness, better shelf-life and attractive external colouration. In the last few years, we've also experienced an increasing demand for new varieties with healthy attributes.

NEW GIANT IN SPANISH CITRICULTURE

Martinavarro has shored up its position as Spain's biggest citrus supplier by joining forces with Huelva's Río Tinto to establish Citri&Co. The move marks the latest stage in Martinavarro's plan to establish itself as leading player in the global citrus market following last year's acquisition by Miura Private Equity of a 25 per cent stake in the group in order to fund its national and international expansion.

The new group will own six packhouses and more than 8,000ha of production, giving it an annual output of 500,000 tonnes of citrus worth an estimated €325m.

"While both Río Tinto and Martinavarro will continue to be run independently, the formation of Citri&Co will allow clients from both companies to benefit from the group's key strengths by providing a wider range of citrus products and ensuring security of supply managed under the Total Quality model," the company said.

"Citri&Co plans to enter into new markets and expand its product portfolio and continue working to diversify its supply from both the Northern and Southern Hemisphere and to ensure a quality product offering to its customers throughout the year."

Almazora, Castellón-based Martinavarro was founded by the Martinavarro, Dealbert and Ballester families in 1946 and is Europe's leading citrus exporter handling 420,000 tonnes a year and with sales of over €280m.

Martinavarro manages around 6,000ha and four packhouses in Castellón, Valencia and Huelva and the organisation has subsidiaries in several countries including the Netherlands and the UK.



ASIAN ADVENTURE

A total of 27 Spanish companies took part in the 2017 edition of Asia Fruit Logistica, the country's biggest presence to date, and citrus was one of the main products on display, reflecting Spain's growing success in the Asian market.

First-time exhibitor García Ballester recently added Singapore to its growing list of Asian markets. The company has been growing and exporting citrus for more than 100 years but is a relatively new entrant to the Asian market, this being only its second full season there. The fastest growth has been in China – shipments having doubled this past year alone – but Malaysia and Indonesia are also key strategic destinations.

The company recently opened a new facility in southern Spain that commercial director Jorge García says will serve as the base for the company's growing Navel programme to China. The company's goal for the coming year is to add South Korea to its growing list of Asian markets. It is also investing in new plantings of Leanri mandarins and Navel oranges.

Meanwhile, SanLucar's Orri mandarins have had a favourable reception in China according to international business development director Holger Brandt, who says the fact that the company can offer the variety year-round is particularly appealing to retail customers. As part of its strategy to bring the SanLucar value chain to China the company has decided to open an office in Shenzhen. The next step, says Brandt, will be to build a distribution centre there.

Anecoop's Pablo Mora says demand for Spanish oranges in China now far exceeds supply and they now sell for the same price as Californian oranges.

Last season Spain shipped almost 20,000 tonnes of citrus to China but Mora says this could have been closer to 30,000 tonnes if the climate had not affected production and shippers hadn't experienced the disruption of the port workers' strike.

"We were planning to send 120 containers but only ended up doing 45," he says. "Nevertheless we're hopeful we can increase our volumes to China in 2017/18."

Juan Motilla, one of the most successful Spanish citrus companies operating in China is warning that the ongoing dispute between port workers and the Spanish government is putting the sector's future in Asia in jeopardy. Having already caused major disruption to shipping schedules last season it threatens to do the same in the coming season unless a resolution is found.

"The stevedores' actions are putting the brakes on our expansion plans and endangering a business that we have worked very hard to build up," says commercial manager Juan Motilla.

How has Spanish citrus production changed over the past decade in terms of protected varieties? What proportion of Spain's output do such varieties now account for?

MC: The market share of protected varieties is growing significantly, especially on the mandarin front. There are some protected varieties of oranges and lemons, a few of grapefruit and a large number of protected mandarins which represent most of the citrus offer, especially from Christmas time until the end of the citrus season in May, when superior mandarins such as Orri, Tang Gold and Nadorcott lead the market.

How big a problem is the unauthorised planting of protected varieties in Spain? Are producers gradually coming around to the concept of licensed varieties?

MC: While it remains a big problem in the citrus sector a lot of progress has been made. The legal framework is clear and knowledge and understanding of it have been massively improved thanks to the positive experiences of growers and exporters, better control systems, and support from the government, grower unions and other bodies who have helped to raise awareness through seminars, workshops, visits to trial plots, etc. _ ●



LEMON OUTLOOK POSITIVE

Ailimpo's initial lemon harvest for the 2017/18 season points toward a production volume of 1.08m tonnes, similar to the previous season's total. The association said the figure would enable the sector to once again consolidate its export volume to EU markets, satisfy growing demand in the domestic market and re-launch exports to third countries such as Canada, Brazil and the Middle East.

"Moreover, this production volume will afford normal lemon processing activity, for which Spain ranks second worldwide and has a key role in regulating the offer and market balance," Ailimpo said.

.....
ABOVE—Mateu Chilet: there are more protected varieties available than ever



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TROPICALS

REPORT
—Avocados

The lighter avocádo has landed

MADRID—Eurobanan is preparing to take the market by storm with its new low-fat avocado.

by Maura Maxwell

Eurobanan's new Avocado Light is set to be an instant hit when it is officially unveiled at this year's Fruit Attraction in Madrid. With 30 per cent less fat, it is kinder to waistlines while still packing the same nutritional punch as mainstream varieties.

The exclusive variety, which is being sold under Eurobanan's Isla Bonita label, comes from specific regions in Latin America where the climate and growing conditions confer the fruit with its unique characteristics that includes a lower fat content. Its nutritional make-up has been independently verified in laboratories in the country of origin and the avocado carries the seal of approval from the Spanish Hearth Foundation's Food Health Programme as being a product with reduced fat content.

Eurobanan's import and marketing director Ramón Rey acknowledges that the timing of the launch could not have been better – coming at a time when the market is caught in the grip of full-blown avocado mania.

This is by no means Eurobanan's only new offering for Fruit Attraction. The company will also be

showcasing the latest additions to its Premium Gold range which brings together the finest selection of Isla Bonita-branded tropical and exotic fruit that has been picked at its optimum point of ripeness and packed to the highest specifications, as well as its new range of super juices incorporating superfoods such as chia, kale and turmeric.

With demand for convenience products at an all-time high, Rey is confident that these new products will chime perfectly with a growing awareness among consumers about environmental issues and ongoing concerns over health and wellbeing.

"Consumers have grown accustomed to getting what they want, when they want," he says. "This is the market we face today and the one that companies must respond to. Providing innovation and added value cannot simply be an aspiration: we have to make it a reality." ●



ABOVE—The exclusive variety has 30 per cent less fat than a regular avocado



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LEFT—Trops expects to see a 25 per cent increase in its mango output this season
RIGHT—Frutas Montosa's Native-branded guacamole and mango sauce

The future's bright for tropical

MÁLAGA—Business is booming for two of Spain's leading tropical fruit specialists, Frutas Montosa and Trops.

by Maura Maxwell

Mangoes and avocados are riding high in the popularity stakes. Spain is Europe's leading grower and exporter of both products, the subtropical microclimate around Málaga and the coastal areas of Granada being ideally suited to their cultivation.

According to the National Association of Subtropical Fruit Producers, more than 90 per cent of national avocado production and 95 per cent of mango production are concentrated within these two regions and it is here that two of Spain's leading producers are to be found.

"We're fortunate enough to work with two products that are delicious and nutritious as well as being fashionable"

Frutas Montosa is made up of some 1,500 producers and employs more than 400 people. The family-owned company has been on a continuous growth trajectory since its establishment in 1982 and last year it saw its sales break through the €100m barrier for the first time.

This was helped along by strong growth in the company's fresh and processed lines. Its Native-branded guacamole and mango sauce have proved to be a hit with Spanish consumers and were recently launched in the UK market.

Marketing manager Isabel Izquierdo believes there is some way to go before demand for mangoes and avocados peaks.

"In countries like Chile, per capita consumption stands at around 5kg – in Spain it doesn't yet reach 1kg," she notes. "Fortunately, both mangoes and avocados are perceived by consumers as being particularly healthy and beneficial."

The firm concentrates exclusively on supplying the European

market, with a heavy focus on the premium sector. It supplies customers 365 days a year through partnerships with producers in South America and Africa.

In order to ensure that the fruit reaches the customer at its optimum ripeness, its firmness and Brix level is checked before it leaves the packhouse and the temperatures in the trucks are adapted according to requirements on the journey.

Meanwhile, Trops sold a record 20,000 tonnes in 2016/17, plus 8,000 tonnes of mangoes, giving the company an annual sales total of €80m. Commercial director Martina Otten says the positive results were down to higher yields, an increase in planted area and the incorporation of new growers into the cooperative, which today comprises more than 2,000 members.

"For 2017/18 we expect to see a 25 per cent increase in mango production, but avocado production is likely to be somewhat lower than last season, although we

Spain has been chosen as the venue for the thirteenth edition of the International Mango Congress, which will take place in October 2020. The announcement was made during the 2017 edition of the conference which was held in Guangxi, China in July.

Although Spain does not rank among the world's top mango producing countries, the decision reflects the importance of its research work into mangoes and other subtropical fruits.



TROPICALS



FRUTAS FÉNIX

Mangoes and avocados are the latest additions to Valencia-based Frutas Fénix's range. The company specialises in supplying Spanish-grown fruits and vegetables to Central and Eastern Europe and has now set its sights on conquering the Asian market. It has carried out limited shipments of kaki and oranges to Hong Kong and China and is now looking to establish a regular programme.

Managing director Tatyana Okhomush believes the company's Fenix Flame and Roksolana brands are a natural fit for the Asian market. "Our main focus in Asia is on citrus, kaki and pomegranates but we have an extensive catalogue which means we can supply the market the whole year round," she says.

don't yet have concrete figures," she tells FRESH FOCUS SPAIN.

Although consumption of fresh fruits and vegetables is going down in Spain, avocados and mangoes are both bucking the trend, maintaining healthy growth.

"We're fortunate to work with products that are considered to be fashionable," Otten says. "As well as being delicious, both have extraordinary nutritional benefits

and are very versatile."

And as per capita consumption in Spain lags behind that of neighbouring countries like France and Portugal, she is optimistic about the future.

"The greater availability of ready-to-eat fruit is fuelling demand for mangoes and avocados in both the retail and foodservice sectors," she says.

"It wasn't easy in the beginning and it took a while to learn how to ripen the fruit properly. But we have invested considerably in ripening rooms and in developing the know-how to guarantee that the quality of our ready-to-eat offer is second to none." ●

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REPORT
—Organics

Exceeding expectations

MÁLAGA—Eurofresh is expanding its avocado supply base and adding new tropical lines to its organics range.

by Maura Maxwell

Organics specialist Eurofresh prides itself on being able to supply organic Hass avocados 365 days a year and it is now looking to extend its range with the introduction of new exotic lines including ginger, turmeric and mango.

International sales manager Sergio Pérez-Borbujo sees opportunities in every corner of the globe. We believe there is the potential to develop surprising and different products from countries like Ecuador, Thailand, Kenya and Vietnam," he tells FRESH FOCUS SPAIN.

At present the company's production base spans Spain, Peru, Colombia, the Dominican Republic and Morocco. In addition to owning its own farms it works with around 700 local growers, managing around 3,600ha overall. Its biggest operation is in Peru, which accounts for approximately a third of its output.

Last year the company beefed up its organic avocado offer with the introduction of fruit from the Dominican Republic and this year it launched the first Fairtrade organic avocados from Peru.

"Organic avocados are our flagship product and the one that really defines us as a company," says Sergio Pérez-Borbujo. "We believe in growing 100 per cent organically, using the highest food safety standards and without compromising on quality and flavour. We control the whole value chain from the field right through

"We don't treat fruit as a commodity. Behind every avocado that we grow we see a consumer whose wellbeing and values we respect"



to delivery to the supermarket to ensure that this is achieved."

This approach is the reason why Eurofresh decided to set up its own ripening and packing operation in Rotterdam four years ago. Explaining the company's philosophy, Pérez-Borbujo says: "We don't treat fruit as a commodity. Behind every avocado that we grow we see a consumer whose wellbeing and values we respect".

He likens the service the company provides to a tailor-made suit designed to fit the customer perfectly, be it small retail packs or large-scale formats for the foodservice industry.

Eurofresh was quick to spot the potential of avocado cultivation in Colombia and Morocco and took the decision to develop a production base in both countries some five years ago. Pérez-Borbujo claims both have cultural idiosyncrasies that make them quite different from other countries and says establishing a production base

required "vision and a lot of perseverance that is now beginning to bear fruit".

"Colombian avocados are still largely unknown in Europe, although they are gradually starting to gain traction. The climatic and soil conditions in the country require very specialist treatment and there are not many companies that have the expertise to export the fruit," he says.

With the recent opening of the US market to Colombian avocados and negotiations well underway to secure access to various markets in Asia, Pérez-Borbujo is confident that Colombia has a bright future ahead – an optimism he shares about the organics movement in general.

"Countries like Germany, Switzerland and Austria were the first to embrace the organics trend some 20 years ago, and the market is still going strong, with our sales increasing by around 20 per cent a year," he notes, adding that US retailers like



Walmart and Costco are also committing to organics in a big way.

The next frontier for Eurofresh is Asia. Although the market still lags a long way behind Europe and the US, Pérez-Borbujo observes that importers, retailers and even governments are working hard to increase the consumption of organic produce.

"The forecasts suggest that the market will grow exponentially over the next five years and when this happens we're facing a scenario when there may not be enough fruits and vegetables to supply the European market," he warns. "Europe's retail sector is undergoing some profound changes and if supermarkets want to remain competitive and guarantee their supply they will have to get closer to producers and optimise the value

LEFT—Eurofresh guarantees a year-round supply of organic avocados

RIGHT—Ginger is one of the company's new product additions

chain. That is the only way in which they will be able to take on the likes of Amazon, who are set to cause real disruption in the industry."

In the mean time, he says Eurofresh will continue to invest in its production and expanding its packing capacity to handle its expanding product range.

"Our investment in food quality and food security will continue to grow, as will our goal to consolidate our position in new markets such as South Korea and Singapore," he says. "Further down the road, we plan to develop processed to complement our portfolio of tropical fruit." ●



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REPORT
—Companies

Orsero buys Hermanos Fernández López

BARCELONA—The Fernández family has taken a major stake in the Italian distributor as part of deal that brings Spain's second-largest produce supplier under its control.

by Mike Knowles



Italian fresh produce group Orsero looks set to extend its reach in the Spanish market – as well as offering a boost to major brands like Marlene, Zespri, Pink Lady, Fresón de Palos and Sandia Fashion – after agreeing a deal to acquire Barcelona-based distributor Hermanos Fernández López, in which it already has a 50 per cent shareholding.

Significantly, the deal makes the Spanish firm's owner the Fernández family the second-largest shareholder in Orsero, after FIF Holding. They have been active in the Spanish fresh produce market for over half a century and are expected to remain fully in control of the company's daily operation. In addition, they will now occupy a place on Orsero's management board.

The acquisition also represents a positive step for Orsero, securing the long-term future of its partnership with Spain's second-largest fresh fruit and vegetable supplier. Last year, Hermanos Fernández López generated sales of €181m, marketing around 180,000 tonnes of produce via three major distribution platforms in Madrid, Barcelona and Alicante, as well as 33 sales outlets in seven of the country's wholesale markets.

Orsero was listed on the Italian stock exchange at the start of 2017, a watershed moment that saw the company merge with a special purchase acquisition company called Glenalta Food and change its name from GF Group. That listing gave the group a more secure financial footing after its much-publicised debt restructuring, while the disposal of non-core operations like Moño Azul in Argentina and an executive jet airline company have afforded it more freedom to restructure loans and insurance deals. That opens the door once again to future expansion, with confidence returning on the back of net sales of €685m in 2016 – up from €617m in 2015 and €555m in 2014.

As far as Orsero's commercial strategy is concerned, strengthening its position as a leading fruit and vegetable distributor in southern Europe is very much the priority. In Spain, where its range of branded products enjoys a good reputation among buyers and consumers, the group says the Hermanos Fernández López deal will allow it to continue investing in its own F.lli Orsero extra-premium trademark in Spain.

Commenting on this and two other similar acquisitions – Orsero has also agreed to buy a remaining

50 per cent share in Fruttital Florence and Galandi, also based in Florence – Orsero's vice-president and chief executive officer Raffaella Orsero suggested there was plenty of scope for expansion in the Mediterranean. "These acquisitions reinforce our leadership in the market of southern Europe. We believe strongly in retaining these two companies' management operations, which have made them strong and vital in their respective markets. They will continue to offer not only valued commercial support but also real added value in terms of growth." ●



ABOVE—Orsero CEO Raffaella Orsero sees plenty of room for growth in Spain
TOP—Hermanos Fernández López sells a full range of fresh fruit and vegetables

REPORT
—Italian apples

Apple production in Italy's Val Venosta region might be 20-30 per cent lower than last year due to the widespread spring frost, but for the v.i.p. Val Venosta cooperative, the prospects for a good start to the season remain rosy. That's partly thanks to an expected increase in volumes of club varieties like Kanzi, Envy and Ambrosia, production of which has continued to expand despite the adverse conditions.

Ambrosia in particular appears likely to generate plenty of interest. Along with Piedmont-based group Rivoira, v.i.p. has grown the variety under a Europe-wide exclusive licence since 2013. Now, the two companies are looking to consolidate the progress they've made, with an eye on further growth in 2018/19 when their output should take another major step forward.

"The very warm summer and a lack of rain has obviously had an effect on the average size, which will be slightly smaller as for the other varieties," predicts Rivoira's executive manager Marco Rivoira, "but we think the market will adapt to the situation thanks to the product's

intrinsic quality and the general lack of European apples."

What does bode well is the fact that last year the companies enjoyed a positive response to the launch of Baby Ambrosia, smaller versions of the variety sold in 1kg bags for the domestic market and in 18kg packs for export. "So we're not worried about having a larger quota of product at this size," Rivoira adds.

Fabio Zanesco, commercial director at v.i.p. says the South Tyrolean Ambrosia crop will in fact be larger this season as new plantings come into play. "Today our contribution remains below its potential because of the spring frosts, but anyway we will have good sizes because the summer heat had a lesser impact in our mountain regions and there was enough water."

The first new-season shipments of Ambrosia out of Piedmont were on their way to a number of different markets in mid-September, while Val Venosta's harvest was due to begin towards the middle of October.

GROWTH IN STORE

Given the comparative lack of product, the new campaign is unlikely to see major expansion as far as international clients are concerned. As

Undying love for Ambrosia

LACES—Recent investment in club apple varieties looks likely to keep Italian suppliers in a strong position commercially this season, despite the expected loss of production due to frost.

by Mike Knowles

a result, the partners' commercial strategy for Ambrosia and another of their shared, licensed varieties, Golden Rosé, will continue to focus on clients in Italy, Europe and beyond. "It seemed like a natural choice to focus on consolidating our sales this season," Zanesco explains, "even if there is the opportunity to work with some new customers with volumes that will we will reserve on a joint-venture basis."

Zanesco is keen to point out that consolidation doesn't mean the partners will stop thinking about the future. "We have several innovations to present soon in terms of packaging, distribution and communication," he reveals. "Ambrosia will continue to grow in the coming years. We are confident that many other buyers and distributors will gradually join us to expand Ambrosia's reach and to offer it to consumers in a larger number of national and international outlets." ●

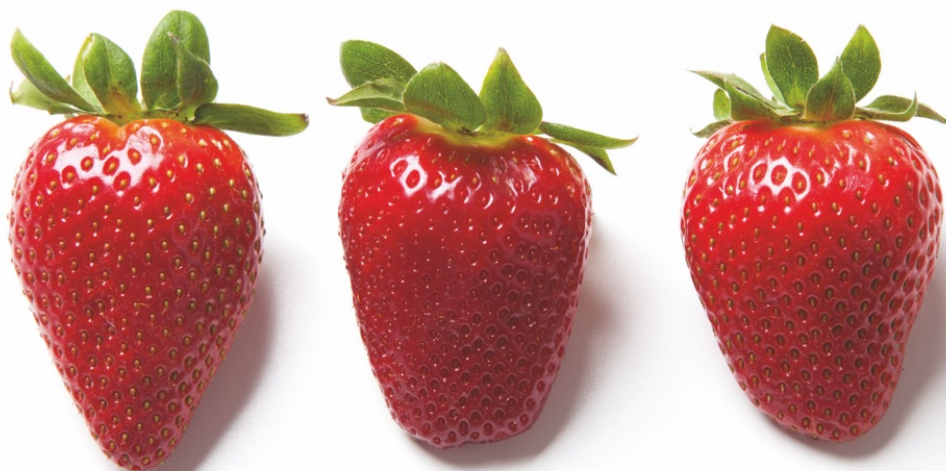
.....
BELOW—Ambrosia volumes are set to rise this season



BERRIES

REPORT

—Strawberries



Spain's berry renaissance

HUELVA—The global berry boom is transforming Spain's soft fruit sector. Fresh Focus Spain brings you a round-up of some of the newest developments.

by Maura Maxwell

Spain's soft fruit industry has become a hive of innovation. A better product mix has restored the sector's profitability and growers are embracing new trends and technologies in their bid to capture new consumers. Whether it's the introduction of new varieties that enable companies to extend their season and raise the quality bar, or the harnessing of ground-breaking marketing concepts, there's no doubt the industry is abuzz with fresh ideas.

Cuna de Platero is a case in point. The company's Global Berry Partner concept has gone from strength to strength since its launch in 2016. According to managing director Juan Bañez, it is now able to supply Spanish-grown strawberries and raspber-

ries throughout the year and blueberries for an eight-month period, while it continues to develop its blueberry and blackberry programmes in order to extend the season.

This summer the company harvested its first strawberry crop from the province of Ávila in a pilot programme involving a 5ha trial plot. Harvesting in Ávila begins in June, once production in Huelva has come to an end, and runs through to November.

"We'll be able to assess the results once the season ends in





November, but up to now the results have been satisfactory," Bañez says. "We're not talking about a huge quantity of fruit, but it nevertheless allows us to offer our customers premium strawberries throughout the year."

On an industry-wide level, he expects to see a more even distribution in raspberry volumes throughout the year, with fewer supply peaks, now that the range of varieties available to producers has increased, while in blueberries, volumes are set to rise as plants become more mature.

"Blackberries are the big challenge for Huelva right now. There are huge opportunities to develop this product but we're still looking for the right variety, one that combines the quality and flavour that the market is seeking with a stable production volume throughout the year," he adds.

In terms of strawberries, Cuna de Platero's production is focused on the indigenous varieties developed by and for the Huelva industry, such as Fresas Nuevos Materiales's Primoris, Rábida and Rociera, which Bañez claims are tried and tested in terms of maintaining their flavour, quality, shelf-life and productivity throughout the season. The company also has its own trial plot in which it continuously tests new varieties.

"Blackberries are the big challenge. There are huge opportunities to develop this product but we need the right varieties"

This year's Fruit Attraction will serve as the backdrop for the launch of the company's brand new slogan. 'From our fields to you' encompasses the cooperative's ethos that the grower is at the heart of everything it does. "Our customers know that our brand is synonymous with quality and freshness because they are buying berries direct from the field," Bañez explains.

He is optimistic about the health of the soft fruit industry. »



LEFT—Fresas Nuevos Materiales' strawberry varieties are tried and tested
BOTTOM LEFT—Cuna de Platero's managing director Juan Bañez
ABOVE—Fresón de Palos has hooked up with Sony for its new Peter Rabbit film

Strawberry and Blackberry Raspberry varieties



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BERRIES

"Demand is expected to increase throughout Europe and Huelva is very well positioned. We are the main producer in Europe and we are very specialised and professionalised, which allows us to adapt quickly to the needs of the different markets," he says.

"Moreover, consumers are also becoming better informed about the origin of the products they buy, as well as the production process employed and the philosophy of the companies that supply them. Our sustainable management model fits perfectly with these values."

While most companies within Huelva's soft fruit industry are seeking greater diversification, Fresón de Palos's identity remains firmly rooted in its star product, strawberries: its annual output of 70,000 tonnes makes it Europe's biggest strawberry producer.

The company has nevertheless gradually been introducing other

Spanish soft fruit producers have high hopes for the forthcoming season. As strawberry acreage stabilises, the expectation is that there will be a better balance between supply and demand. According to Freshuelva, around 5,400ha have been planted with strawberries in the province of Huelva for 2017/18 compared with 5,800ha in the previous season. This is part of a wider trend that has seen producers switch increasingly to other berries, principally blueberries, as they chase higher returns.

berries to its offer and now produces 3,000 tonnes of blueberries, 1,500 tonnes of raspberries and 500 tonnes of blackberries a year.

While it retains a strong focus on the local market, selling 35 per cent of its volume domestically, it is also exploring new opportunities both within Europe's borders and beyond. In September the company became a first-time exhibitor at Asia Fruit Logistica in Hong Kong. "We've done some trial shipments of blueberries and strawberries to Hong Kong and see a good opportunity to develop the Asian market for blueberries," says marketing director Jaime Zaforas.

When it comes to marketing, Fresón de Palos is without doubt one of the most innovative in the

industry. Last year it joined forces with Sony Pictures in a joint promotion centred on the launch of the Smurfs: Lost Village film, a campaign that Zaforas describes as a huge success – so much so that it has once again linked up with the entertainment giant on its new live action/animation feature Peter Rabbit, due to be released in March 2018.

The campaign will once again feature television, internet and print advertising and consumers will have the chance to win a range of prizes including a trip to the Sony Pictures studios in California.

"Like the Smurf movie, there is a natural affinity between our products and the character of Peter Rabbit. Beatrix Potter, the stories' author, was a well-known naturalist and the fruit and vegetables garden features prominently in the books," says Zaforas. ●

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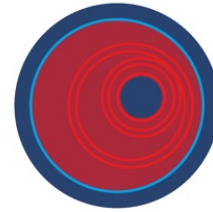
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BERRIES

INTERVIEW

—Iván Leache, BerryWorld Iberia



LEFT—The company is the exclusive European and African licensee for the Mountain Blue Farms varieties
RIGHT—Iván Leache of BerryWorld Iberia



BerryWorld beefs up blues offer

LEPE—Iván Leache of BerryWorld Iberia speaks to FRESH FOCUS SPAIN about the launch of the group's new blueberry programme.

by Maura Maxwell

Fruit Attraction has become the main meeting for Spain's horticultural industry at the beginning of the new season. What news will you be presenting at the fair?

Iván Leache: This year at Fruit Attraction, the BerryWorld group will introduce the blueberry varieties from the Mountain Blue Farms programme, for which we hold the exclusive rights in Europe and Africa. We believe these varieties will change the rules of the game in the blueberry market due to their exceptional taste and because they will be available for 12 months of the year. We are sure that they will receive a great response from consumers and retailers alike.

It's almost a year since BerryWorld Iberia was created. What have you achieved in that time?

IL: We have been expanding our team in order to be able to control and manage more efficiently our pro-

duction from North Africa, Spain and Portugal. And from this season our new R&D centre in Huelva will be up and running and this will provide a big boost to the BerryWorld group. Here, we will be able to test our new proprietary varieties and develop the best practices for each one. We are currently planting the four most important berries: strawberries, raspberries, blueberries and blackberries.

How is the new season shaping up?

IL: Each year is different from the previous one and it is difficult to predict now what may happen over the next nine months. Let us hope, however, that Mother Nature is kind and allows us proceed with as few problems as possible.

How is the berry production landscape changing in Spain?

IL: It seems like strawberry acreage has stabilised and may even increase this next season. Likewise, the growth in new blueberry plantings will be smaller than in previous years. As for raspberries, we think that planted area will continue to expand this year.

How do you see the outlook on the European market over the next few years?

IL: I think that berry consumption

will continue to grow in the coming years. We are fortunate to work in a "healthy" industry that fits well with the new European lifestyle. People are taking better care of themselves and the consumption of berries helps to maintain a healthier life.

The industry is constantly talking about the need to innovate and introduce more added value to the products. Can you give me examples how BerryWorld is going about this?

IL: At BerryWorld we work closely with our retail customers to better understand consumers' needs and trends. We have more than 20 years' experience in the strategic management of the berry category, contributing to the growth of a market that in England exceeds £1.2bn in sales. Within the group we have a large team dedicated to consumer marketing, and another that is continually developing new products, varieties and types of packaging.

Finally, what are the main projects you have lined up for 2018?

IL: One of our priorities is to consolidate our presence in the market with raspberries and strawberries, while introducing new varieties of blueberry and blackberry, to ensure we provide the best quality across the whole soft fruit category. ●



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REPORT

—Fruits CMR

Fruits CMR plots steady course of growth

BARCELONA—With sales increasing every year, the company is making new investments in order to future-proof the business.

by Maura Maxwell



Fruits CMR is to build a new logistics platform at its Madrid subsidiary, CMR Infinita. The 5,000m², state-of-the-art facility will house coldstorage facilities, ripening rooms and office space and is the company's latest investment in Spain's capital city, having previously expanded its presence at Mercamadrid where it now counts a total of nine outlets at the wholesale market.

"These investments will significantly boost our storage capacity and enable us to improve the level of service we provide our customers in the region," says CMR's import-export director Carles Martí Inglada.

The group continued on its upwards trajectory last year posting sales of €160m. The results were boosted by an increase in exports, which now account for 35 per cent of the group's turnover. "Our exports are growing year-on-

year, as are our sales on the domestic market," says Martí, adding that the company now supplies markets throughout Europe and North Africa with a complete range of fruits and vegetables.

Meanwhile, CMR's melon operation in Brazil is also going from strength to strength. The company has 2,200ha of farms at its disposal in the north east of the country – all of which is GlobalGAP and GRASP certified – producing Piel de Sapo, Yellow Honeydew and watermelons for the European market which are sold under the Cosarica label.

"Having our own farms means that we can control the entire production process exhaustively so we can not only guarantee the quality of our melons but we can also ensure that we ship regular supplies to the market from October right through to May," Martí continues.

The European market has experienced its fair share of ups and downs in recent years, with prices suffering as a result of oversupply. Martí acknowledges that timing is everything when it comes to supplying melons over the winter period.

"It's not easy to match supply with demand and shipping the right quantities at the right time with the right specifications is essential to guarantee a positive season," he observes. "At the end of the day, no two seasons are the same."

When it comes to varieties, Martí notes that Piel de Sapo is becoming increasingly popular in central and northern European markets.

"By and large consumers in these countries are unaccustomed to this variety, preferring to buy other, smaller types of melon. However, as retailers become more familiar with its excellent organoleptic qualities we are seeing an upswing in demand and this, in turn is leading to an increase in production," he says.

In order to address the challenges posed by climate change and water scarcity in Brazil, the company will continue to invest in improving its irrigation infrastructure and ensure it has an adequate supply to be able to meet production requirements throughout the season. ●

ABOVE—Cosarica melons are available from October to May

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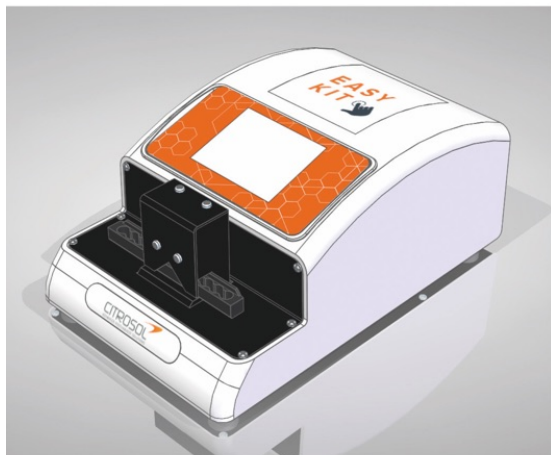


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POSTHARVEST

REPORT

—Citrosol



On-site testing is easy as 123

VALENCIA—Citrosol's new Easy-Kit does away with the need to send samples to external laboratories for testing.

by Maura Maxwell

Necessity is the mother of invention, or so the adage goes, and in the case of Easy-Kit, the latest offering from Spanish postharvest specialist Citrosol, the need for such a tool was indeed acute. The kit provides a fast and simple way to measure PC fungicide concentrations in drenchers, waxes, wastewater and fruit – in fact throughout the entire handling and packing process.

"We spotted a gap in the market," the company's CEO and director of science Benito Orihuel tells *FRESH FOCUS SPAIN*. "Other industrial processes have simple, inexpensive and reliable monitoring and analysis tools but there wasn't a reliable device for measuring fungicide residues on fruit, or for measuring concentrations of these fungicides for postharvest use in situ at different critical points in the citrus packing process, such as during drenching or waxing."

Up to now, the only way to test for residues was to send a sample to an external laboratory for analysis, a process which takes several days, if not weeks, in countries where such facilities are limited.

The kits use a small spectrophotometer, developed by Citrosol, to measure the concentration of fungicides there and then in the packhouse. It takes just 25-30 minutes for the result to develop for treatment baths and waxes and 40-45 minutes to measure residues on fruit samples.

"The immediacy of the results is the key advantage of the Easy-Kit as it allows companies to take swift action to correct any anomalies," says Orihuel. "No specialist knowledge is required for its use, and it is also a much cheaper option for companies as it does away with the need to invest in building a testing laboratory or sending samples to an outside facility."

The kits are multipurpose – they can be used to analyse the concentration of fungicides throughout the entire postharvest process in the packhouse, ensuring that treatments are being applied in the right manner and allowing workers to act rapidly to correct any imbalance: if a dosage is too high it can exceed maximum residue levels, while if it is too low it can lead to problems with fruit rot.

"At the end of the packing process, the kits can be used to analyse residue levels on the fruit itself to ensure that it complies with legal requirements as well as those of individual supermarket chains, depending on the market," says Orihuel. "There is no other product on the market anywhere in the world offering portable, fast, easy-to-use and cost-effective residue and fungicide analysis on the spot. Not only have we found a niche, but it is for a very large segment of the market."

The kits are due to be launched ahead of the new Spanish citrus campaign in October 2017. Citrosol is targeting citrus packhouses in Spain and other producing countries, as well as laboratories and research centres. They can also be used for other fruits such as apples and pears.

"There might also be a potential market for them in other parts of the food distribution chain where quality control is important," Orihuel notes. ●

LEFT ABOVE—The Easy-Kit provides immediate results "in situ"

LEFT BELOW—Orihuel, left, during a visit to the company's new R&D centre



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New solutions for new challenges

VALENCIA—Now in its 50th year, Decco Ibérica continues to roll out new products to meet the changing requirements of the Spanish market.

by Maura Maxwell



Even in today's increasingly crowded fresh produce events calendar, Decco Ibérica believes that Fruit Attraction stands out from other trade fairs. "Fruit Attraction is a unique event where we have the opportunity to get closer to our customers in a pleasant environment and share opinions about service and products, campaign expectations, future movements," the company says.

"This year is particularly special since we are celebrating our 50th anniversary – having provided postharvest solutions to the Spanish market since 1967, Fruit Attraction is without doubt the ideal place to blow out the candles and celebrate together with our customers and collaborators."

During that time the company has launched a number of groundbreaking products, and at this year's show it will be showcasing its new

Deccopyr Pot, a pyrimethanil-based fungicidal fumigation solution for treating stonefruit and pipfruit. It is highly effective against a broad range of fungi and has a low toxicological profile and can therefore be used safely in coldstores or even directly in the container or the truck.

Deccopyr Pot is already registered in Spain and will soon be available in other European markets.

As a multinational, Decco is present in both Asia and South America, where it plays a key role in the growth and development of the local fruit and vegetable production and export industries.

"We have teams on the ground who are continuously evaluating the characteristics of these markets, the condition of the fruit and associated problems so that they can implement the solutions that already available in other mature post-harvest markets like Europe

ABOVE & ABOVE LEFT—Deccopyr Pots are used for treating stonefruit and pipfruit

and the US," Decco says. "Countries such as Turkey, India, China and Chile were our fastest growing markets last year and are projected to keep on growing rapidly in the coming years."

Looking ahead to 2018, Decco expects to go on expanding in emerging markets and consolidating its position in countries where it has been a leader for years.

It will also continue to develop products that respond to new trends in the market such as organics while expanding its catalogue of post-harvest protection solutions. ●

The Deccopyr Pot is highly effective against a broad range of fungi and can be used safely in coldstores or even directly in the container or the truck

REPORT

—agilesFood Iberia

CLICK AND CONNECT

The creators of a new mobile-based online marketplace for the fresh produce industry believe it has the power to revolutionise the way produce is traded globally. Established in November 2016, FruitsApp is described by its founders Carlos Iborra and Eslem Alzate as the first bidirectional business-to-business marketplace for the fruit and vegetable sector.

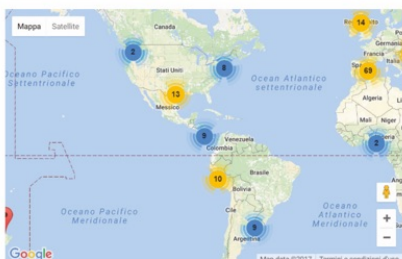
It uses artificial intelligence and algorithms and bots to connect buyers and sellers all around the world, thereby streamlining the trading process, avoiding intermediaries and saving time, resources and money for the companies involved. And by connecting all the actors in the chain, FruitsApp raises the visibility of even the smallest company, enabling it to reach a better deal.

"Carlos had been working for a number of multinationals within the industry for more than ten years. He observed that by communicating via costly and inefficient means such as telephone calls and fax, sellers were losing out on the best deals as they had no way of reaching all potential buyers to compare options," explains Elena Molinaro. "Thanks to our algorithms we know who is selling an apple and who is looking for apples and we connect them through an interactive map that they have in their personal profile."

The logistics are also integrated, meaning that at the end of each transaction the app provides various options of companies that cover a particular route.

Companies register to use the site for free and are charged a small commission on each transaction and logistics route. In addition to the basic service, FruitsApp offers extra services – such as demand, price and trend forecasting – for premium users at a fixed price. Sellers joining the platform are required to upload proof of GlobalGAP, HACCP or other accreditation systems, while buyers have to undergo solvency checks before they can use the service.

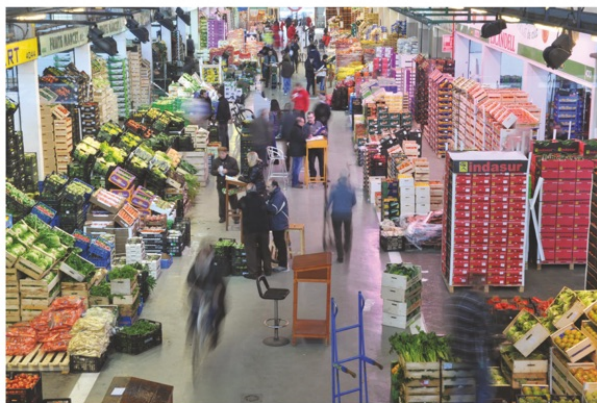
There are already over 1,400 companies registered on the private network, including Carrefour, Spar, Coop, Dia, Edeka and Fresh Del Monte. Most are located in Spain, but a growing number are based in other countries in Europe and South America.





REPORT

—Mercabarna



Giving back to the community

BARCELONA—Mercabarna plays a pivotal role in its local community, something it has worked hard to nurture. Managing director Josep Tejedo outlines some of the initiatives that make it a shining example to other wholesale markets the world over.

by Maura Maxwell

Throughout its 50-year history, Mercabarna has been in a constant state of evolution. Long gone are the days when it served merely as Barcelona's wholesale market; today, housed within its 90ha site on the edge of Spain's second-biggest city, and within easy reach of the international port and airport, is a thriving food city that operates 24 hours a day

Mercabarna recorded a 1.8 per cent increase in sales during the first half of 2017, a year in which the market handled 1.8m tonnes of produce. Assuming it continues on its current trajectory, sales will be up 2 per cent for the whole year.

"Fruits and vegetables are a mature sector and we don't expect to see big increases in sales, so we are very pleased with the result," says Tejedo.

He puts the market's solid performance during the first semester down to strong demand generated by the region's tourist industry.

as a distribution hub for the entire western Mediterranean. "We believe that the future lies in building a more efficient Mercabarna and, at the same time, one that is more in touch with the local community," says managing director Josep Tejedo. "That is why we have put the fight against food waste right at the heart of our agenda. Even though current waste levels are just 0.5 per cent, our objective is to contribute to a more sustainable supply chain."

This year saw the launch of the Strategic Plan for Food Usage that will culminate in the creation of a Food Usage Centre at the end of 2018. The aim is to make better use of the food that is left over at the end of each day by collaborating

with local charities to distribute it to those in need.

Furthermore, the market operates a scholarship programme – now in its third year – which takes on 50 unemployed workers and new graduates, as well as providing training for many more in the food sector. Last year alone, the scheme trained 282 people, of which more than half went on to find work in the industry.

The market also plays an important role in helping to promote healthy eating among schoolchildren and is an active participant in local 5-a-day initiatives, teaching kids about the important role of fruits and vegetables in healthy diet. ●

Mercabarna will play host to the next edition of the International Congress of the World Union of Wholesale Markets (WUWM), which takes place on 16-18 April 2018. The event attracts around 300 delegates, among them representatives and businessmen from the world's most important food markets, including wholesalers and retailers, from some 30 countries.

Under the theme "Markets of the Future: Responsible and Efficient", the congress will address the impact of markets on society and the environment. "Among the topics that will be discussed are food waste, markets as employment generators, educating children in eating habits, excellence in waste management and energy efficiency," says Josep Tejedo.

The conference will also analyse the vital role that markets can play as the backbone of society, and look at ways to increase the links between wholesale and retail markets.



TOP—Mercabarna celebrated its 50th anniversary in 2017

LEFT—The market's 5km and 10km races attract thousands of runners



biggest wholesale markets in Barcelona, Valencia and Madrid, as well as to producers across the country.

The new company is headed up by Jordi Calavera, whose company Ingravika has been agilesFood's local partner in Spain for the past seven years. "We chose Barcelona because we already have several customers at Mercabarna but more importantly that is where Jordi and his team are based," explains agilesFood Iberia's chief executive officer Christian Sega. "Jordi is from Barcelona and has extensive knowledge of the local fresh produce industry, so it seemed the perfect fit."

Calavera says that setting up the new division will allow the company to provide an even more spe-

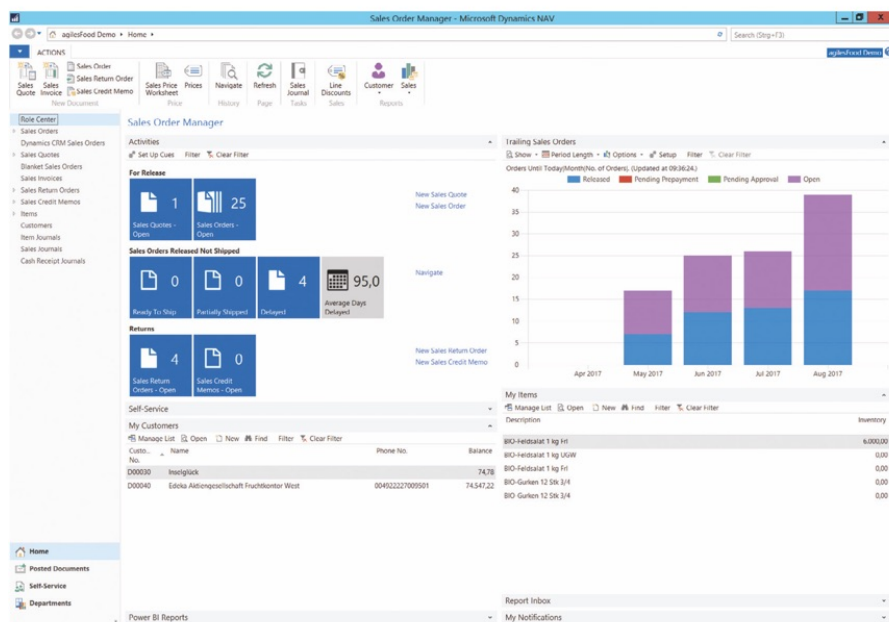
cialised service to its customers in Spain. "Obviously being located where our clients are provides two great benefits: cultural proximity and a faster response time to any incident," he says. "Our new business project with agiles allows us to specialise even more in a market where it already has extensive experience."

The founding of agilesFood Iberia is part of the group's wider expansion strategy that will see

further planned overseas openings in the coming years. With customers in ten continental European countries, the company now has the UK and US markets within its sights. The company has a strong vertical industry focus and its aim, says Sega, is to expand organically through strategic collaborations with local partners in various target markets.

Inventory management tools offered by the company cover virtually all processes including batch accounting, traceability, best before dates, order processing and packaging. One of its key advantages is that it uses Microsoft software, making it easy to implement and giving it a level of integration that other proprietary products cannot match. The platform is based on Microsoft Dynamics 365 Finance and Operations (formerly known as Navision or Dynamics NAV). It is very scalable and easy to adapt to the requirements of different countries.

"Supply chains are essentially the same the world over, and clients have very similar needs wherever they are based," Sega adds. "We add value by providing tried and tested localised software solutions that fit perfectly with the needs of each customer."



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STONEFRUIT

REPORT

—New varieties

SANLUCAR EXTENDS APRICOT WINDOW

SanLucar is boosting its premium apricot offer with a focus on early and late-season varieties grown on its farms in Spain and Turkey. With 270ha under production in what it claims to be the largest project for modern apricot varieties in Europe, the company is now able to market apricots from April through to September. The bulk of production is located in Murcia, Spain. In addition this year, late-season apricots are being sourced from farms in Turkey where SanLucar works in partnership with local growers. This will enable the company to prolong its marketing window until the month of September. "During the last three years, we have been focusing on selecting from the latest generations of fruit trees and the newest varieties," says SanLucar Group chief executive Stephan Rötzer. "The goal is always to obtain a product with the best taste and quality. It is a very dynamic process. Our research and development team dedicates itself daily to identify varieties that best meet our standards as a premium brand."

This season, the company introduced an innovative slider pack described as a convenient packaging 'to go' in which the apricot is well protected, preserving its quality by avoiding direct contact with the fruit.



Remaining relevant

SEVILLE—Innovation and diversification are the latest buzzwords in Spanish stonefruit, as producers seeking greater differentiation in an increasingly embattled sector.

by Maura Maxwell



he past few years have not been kind to Spain's stonefruit producers. Overplanting, the closure of the Russian market and deep-rooted structural problems have led to some eye-wateringly bad commercial results.

This has prompted a wave of diversification into new products and markets among some of the industry's leading players. Others have opted to focus more of their attention on premium varieties in a bid to shore up their competitiveness.

Seville-based SAT Royal is one such company. A pioneer in varietal development, its innovative stonefruit portfolio has helped cushion it from the crisis. But the group's Diego Pozancos acknowledges the market is becoming increasingly challenging. "2017 has been another extremely complicated season due to the excessive volume of stonefruit on the market," he says.

The company is carving out new markets for its Pluot and Metis-branded plum-apricot »

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"Although the market was tested by strong volumes, we were very happy with our new arrivals and the overall quality we produced this season"

hybrids, most recently in China where their attractive appearance and sweetness chime perfectly with consumer tastes. The Metis range includes juicy, deep red Oxy; Tonic, which has yellow flesh and contrasting red skin; Safari, with mottled green skin and crunchy-but-juicy pink flesh; and fragrant, yellow-fleshed Aroma with purplish skin.

In addition to SAT Royal, the range is produced by Italy's Granfrutta Zani and Minguzzi, plus Blue Whale in France. As part of its long-term global strategy, the Metis group is also working with Southern Hemisphere producers to ensure year-round supply.



Fruits de Ponent is another well-known stonefruit producer, whose offering includes the popular Oki-branded flat peaches. The company, which celebrated its 25th anniversary this year, has been ramping up production of other products in its bid to become a year-round presence on the market. Today it counts apples, pears, pomegranates, kiwifruit and almonds among its range, as well as other agricultural products including olive oil and grains.

"It's still early days, but we believe our 'Good fruit, 365 days a year' strategy is going well," says Santi Bonet. "We are convinced that diversification is the way forward, not just in terms of our product range but also the services we provide, such as coldstore leasing."

Meanwhile, El Ciruelo is doubling the capacity at its Alhama packhouse in Murcia to handle its growing output of early stonefruit and grapes, both of which are showing strong potential in new markets like Asia.

In spite of the poor prices, sales director Rupert Maude is positive about the company's performance this year. "Although the market was tested by the strong volumes, we were very happy with our new arrivals and the overall quality we produced and I would sum it up as a positive season," he says.

Maude believes that future growth in the market will be driven by the introduction of new varieties that offer better eating quality. "Together with consistent service and a can-do attitude we are convinced that this will deliver long-term growth," he says. ●

LEFT & PREVIOUS PAGE—SAT Royal's pluots are capturing new customers as far afield as Asia

THAILAND BECKONS FOR SPANISH CHERRY PRODUCERS

A delegation of Thai plant health inspectors visited Spain's Jerte Valley in July to tour the region's orchards and packhouses and monitor pest control programmes. The visit is the latest step towards the signing of a protocol that would pave the way for Spanish cherry exports to Thailand, and the culmination of a process which began several years ago.

Representatives from the regional government and Spain's Ministry of Agriculture, Fisheries, Food and the Environment were also present on the visit, which took in several packhouses and gave Thai officials an opportunity to look at sorting, packing and storage facilities and analyse pest control and traceability measures in situ.

Spanish stonefruit producers have set their sights on conquering new markets in a bid to find alternatives to the EU market, which has come under increasing pressure since the Russian ban on European-grown fruits and vegetables was introduced in August 2014.

Progress in Asia has been slow, however. Until now the focus has been on Malaysia, Singapore and Hong Kong, but moves are now underway to explore new avenues.

A number of companies made their first shipments to China last season following the opening of this market to Spanish peaches and plums in earlier that year.



REPORT

—Packaging

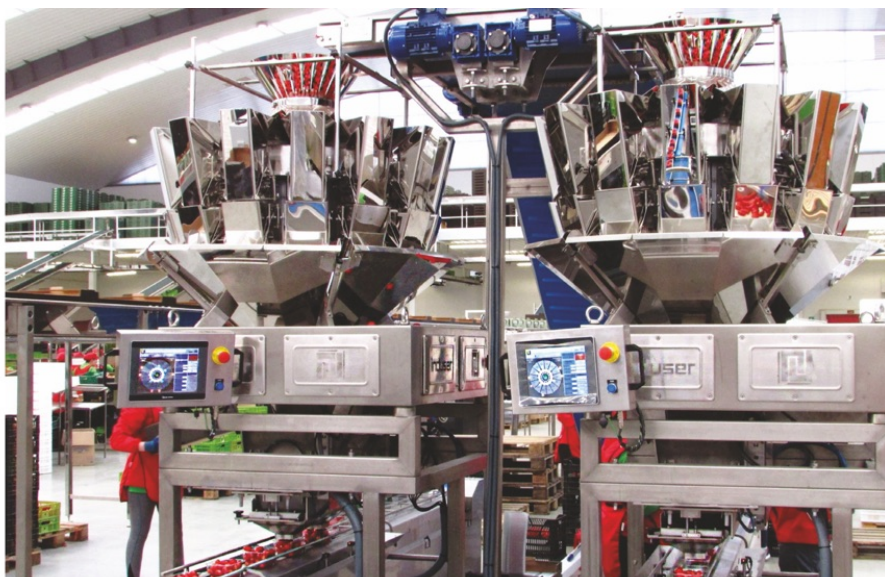
Induser has been designing and building complete packing lines for the sorting and weighing of produce, and the filling, closing, and capping of containers, since 2005. While its main customer base is in Spain, it has gradually expanded its sphere of influence, building up a notable presence in other markets such as France and Austria and more recently has expanded into North Africa and the Americas.

"Our team has years of experience and this has helped us to become experts in precise and efficient packing machinery," says sales and export director Pedro Martínez. "From this solid base, we collaborate with producers to develop new packing solutions, aiming to optimise each client's individual output."

In 2017 the company's turnover reached €5m and it hopes to double that figure within the next five years, mainly through growth in overseas markets. It has been investing both in its facilities and team in order to reach this goal.

"At this year's Fruit Attraction we are presenting several packing products, such as our multi-head weighers, which are ultra-precise and faster than ever," Martínez tells *FRESH FOCUS SPAIN*. "Our 'star' innovation is the concept of adaptability which has been integrated in all of our machines so that they now work with all types of container. We strive to give our clients the opportunity to widen their range of packaging formats without excessive investments or growing pains, which is becoming increasingly important in the market."

He observes that in recent years the European market has demonstrated a really exciting level of dynamism, becoming more consumer-centric and more global in its outlook. "It is clear to us that the market will continue growing



Induser puts adaptability first

ALMERÍA—Pedro Martínez of packaging machinery specialist Induser explains why the company's customisable machines are winning over new customers all over the world.

by Maura Maxwell

this way, introducing new products, as well as innovating through new packing formats in order to integrate consumption into daily life.

"We always consider the latter when designing all of our multi-format machinery; if a company's packing process can't adapt to a new format or container, it is very possible that it will hurt their position in the market."

With new packaging trends emerging constantly, the company has developed totally flexible machinery to support its clients' innovations. For example, this year it introduced a complete high-volume packing line with automatic dispensing, filling, and closing or capping suitable for punnets, clamshells, shaker cups, and buckets.

"The first line we built was prepared for ten totally different formats, and the customer has just widened their catalogue with four additional formats," Martínez

explains. "Changing between formats takes less than a minute, so they don't waste time or money, and they have the flexibility to keep up with the trends and demands of the global market."

Another big focus now is customisable packing, as seen with multi-coloured products like cherry tomatoes and snack or hot peppers, Martínez continues.

Looking ahead, he says the company will continue to expand into new sectors, like nuts and candy, in which it has already been involved in successful projects. Within the fresh fruit and vegetable category, the company sees particularly good opportunities for growth in the berry market. This year it developed a high-capacity berry packing line capable of handling its customer's growing volume.

"Another project we're working on is our bagging machine for resealable zipper-style bags," Martínez continues. "This is already a widespread trend in the American market, and it is sure to be prominent on European supermarket shelves within the next few years. With our experience in automating this type of packing, we will be able to offer complete and cutting-edge solutions to our clients." ●

.....
ABOVE—Induser allows clients to widen their range of packaging formats easily and cost effectively

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REPORT
—Robotics

Investment in robotics offers helping hand for El Dulze

MURCIA—The Spanish vegetable producer has installed a large team of robots at its lettuce packhouse in Murcia, reducing its workforce requirements dramatically.

by Nina Pullman

Spanish vegetable producer El Dulze has installed 68 robots at its packing plant in Murcia in a move that has apparently cut its labour requirements by 80 per cent.

The LR Mate 200iB robots, developed by Fanuc Robotics, use a vision system to detect the density of lettuces on the packing line, and move produce through the root-cutting process. With a capacity of 550,000 lettuces per day, the robots have reduced the required workforce at El Dulze from 500 to 100. The new system has also reduced the number of rejections from 20 to 5 per cent due to increased hygiene and less human contact. "This business has traditionally been labour intensive but today labour is increasingly unavailable," says managing director, José Sánchez.

Faced with a major labour shortage, Murcia's produce industry has relied increasingly on immigrant workers, but Sánchez says this hasn't solved the problem. "As minimal skill is needed we have a real problem with labour and turnover of these workers is high – they just seem to come and go," he explains. "Reducing the amount of people has made everything more hygienic and

damage to the lettuces caused by handling is now minimal."

Sánchez said visiting retailers are now exposed to a high level of investment throughout the business, and said the commitment to robotics has had a "major impact on gaining new business".

El Dulze now aims to increase overseas sales thanks to the investment taking it to a "higher level". "The need to invest wasn't a difficult decision to make. Of course there are many reasons why this investment has been made but generally they all focus around delivering a consistently high quality product and keeping El Dulze competitive," he adds. ●

ABOVE—Finding adequate labour is a major problem in Spain

"Reducing the amount of people has made everything more hygienic and damage caused by handling is now minimal"

2017 was another year of double digit growth for Valencia-based packaging specialist Obeikan MDF. Managing director Salvador Martínez says the company's solid performance is down to a combination of factors. "We're pushing into new markets like China, Peru and Canada and winning new retail customers in countries like France, Germany, Italy and the UK, while continually expanding our product range," he tells FRESH FOCUS SPAIN.

The company's most recent offering includes a range of boxes whose lids double up as children's puzzles and games, or pictures that can be framed and mounted, coasters, Christmas tree decorations and even smart phone holders. "The possibilities are endless," says Martínez, "but in every case the idea is to add value to the consumer."

The company's patented MDF box system are able to withstand even the longest journeys and ensure products arrive in top condition, while their high quality graphic print finish ensures that they really stand out on supermarket shelves.



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