



Food Industry Trends and Consumer Preferences for Blueberries

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Emeritus Professor of Food Marketing

IBO Summit 2023
Centrum Spotkania Kultur
Lublin, Poland

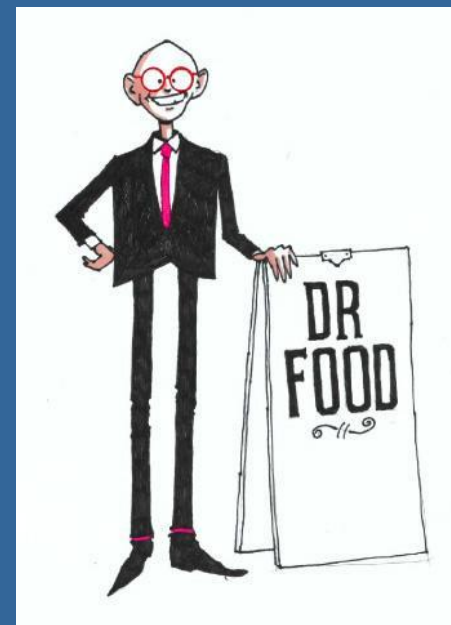
Tuesday, July 4th, 2023



@profdavidhughes

www.supermarketsinyourpocket.com

**Imperial College
London**

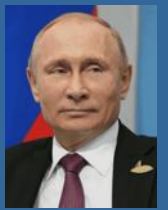
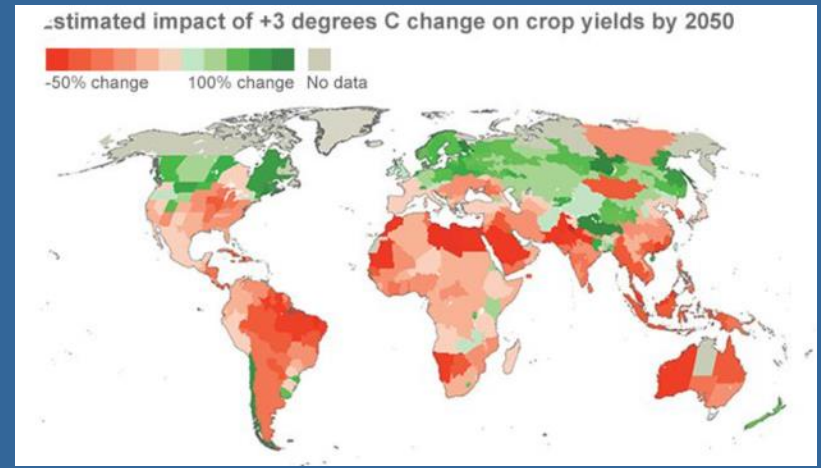
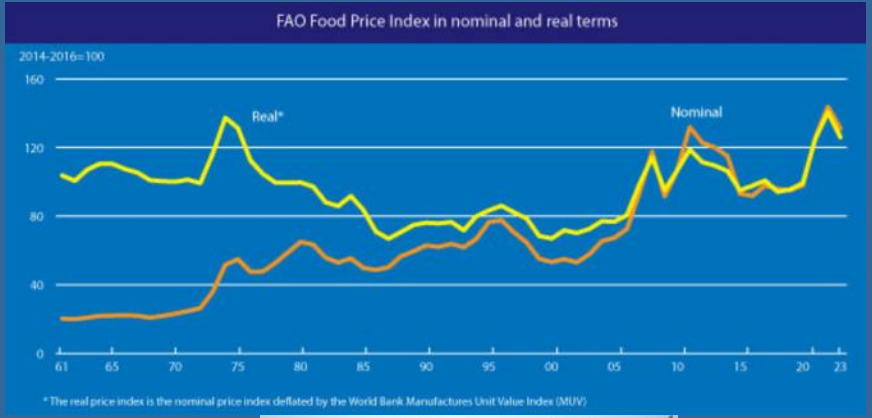
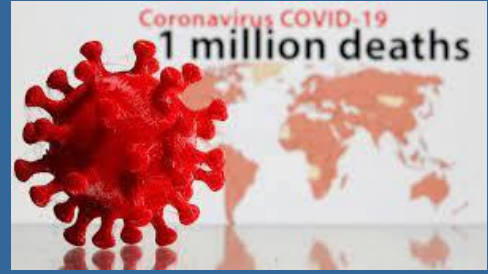


We are Living in Particularly Turbulent Times which are, likely, the New Normal!

unprecedented

/ʌn'presɪdɪntɪd/

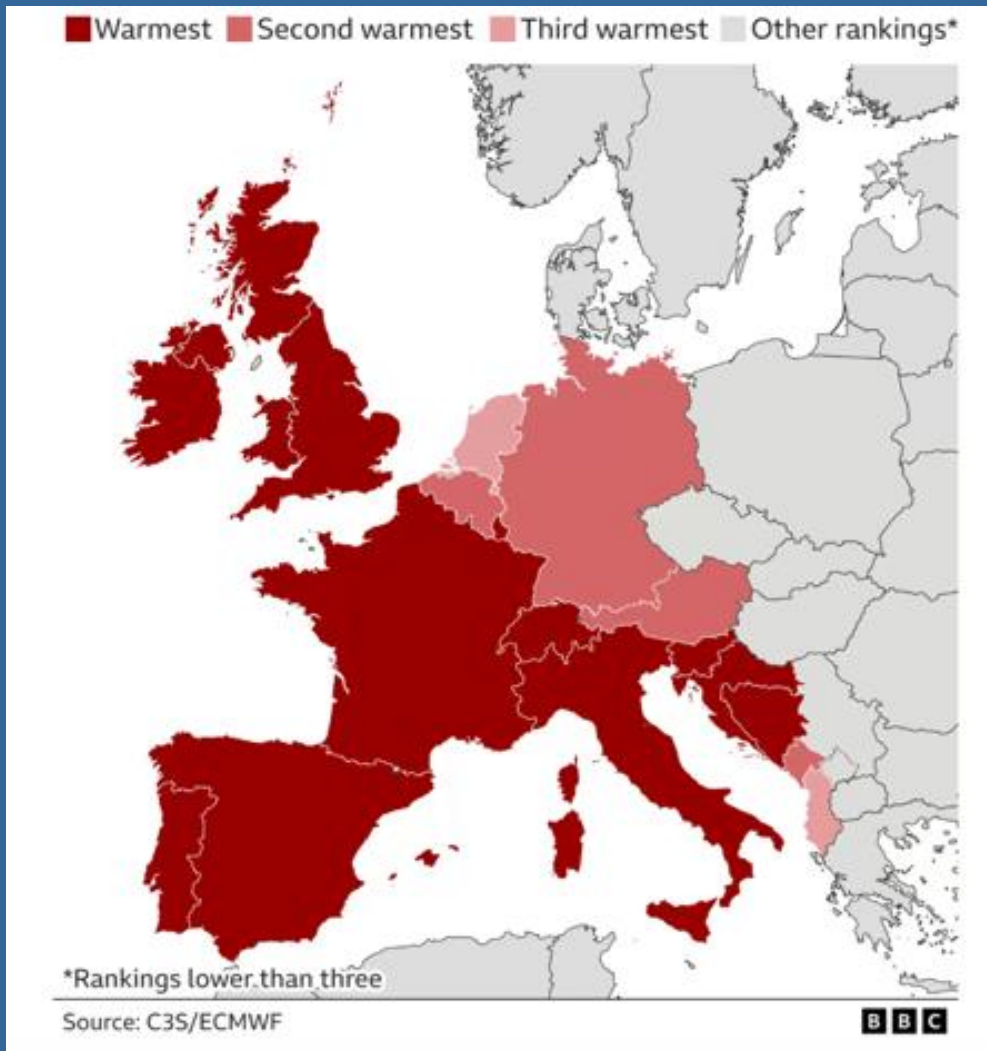
Definition: never done or known before.



8 cycles of ice ages and warmer periods in the last 800,000 years!

Which countries had their warmest ever year in 2022?

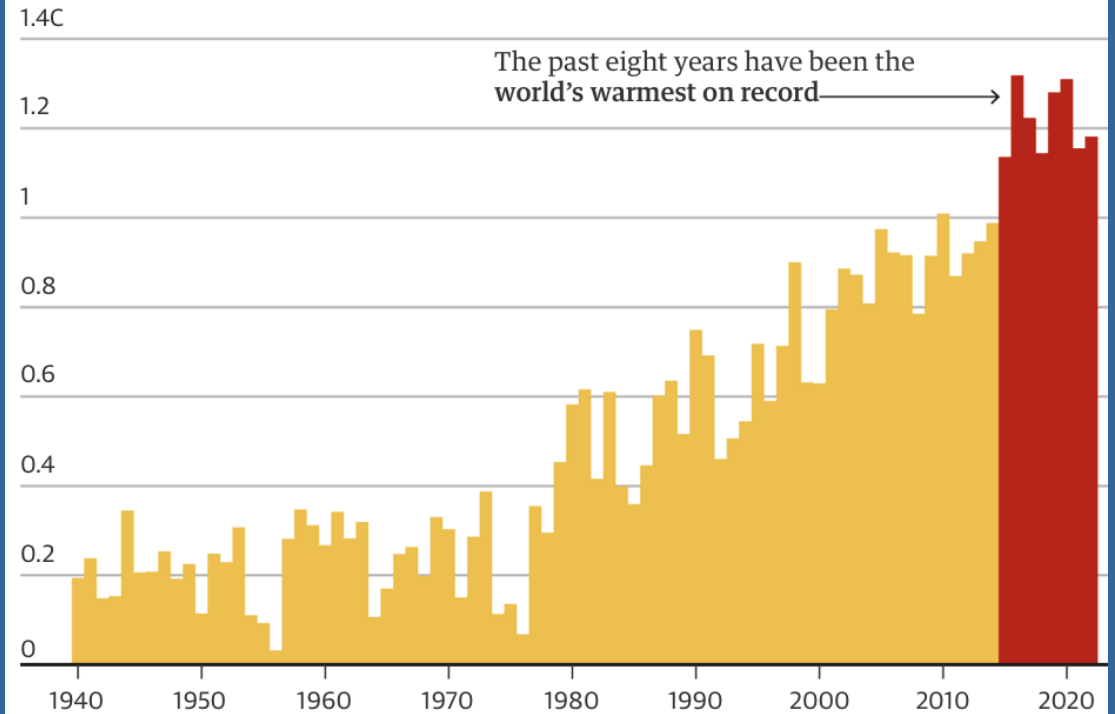
Twelve European countries broke temperature records in 2022



Global temperatures in 2023 set to be among hottest on record

Global temperatures have risen to record-breaking levels

Increase in annual global-average temperature above 1850-1900 average, in degrees Celsius



Guardian graphic. Source: Copernicus Climate Change Service, ERA5. Figures are for surface air temperature anomalies at two metres above ground level, relative to 1850-1900.

Sea level rise accelerates, European glacier melt shatters records,

El Niño planet-warming weather phase has begun

May 2023

US scientists confirmed that El Niño had started. Experts say it will likely make 2024 the world's hottest year.



Food security is back on EU leaders' menu with a global flavour

Countries are Increasingly Concerned About Their Food Security

UK sleepwalking into food supply crisis, says farming union

December 6th, 2022



'Tsunami of need' - UK's biggest food bank network launches emergency appeal

October 20th, 2023



Yes, we have no tomatoes: Why shelves are emptying in UK stores

February 2023

Over 2 million households in Australia (21%) have experienced severe food insecurity in the last 12 months



Rabobank analysis forecasts "eggflation" to remain high in 2023

Nearly 6 million people in Canada experienced

food insecurity in 2021,



Home-based foodbank needs help as demand soars in Christchurch

June 2021

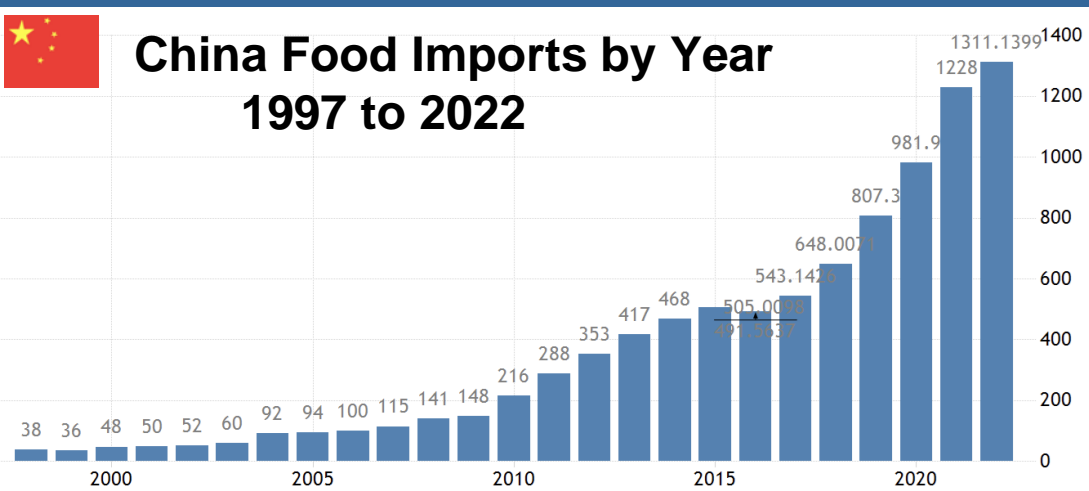


India's rice export ban: The Asian countries set to be hit hard — and those that'll profit

September 2022



China Food Imports by Year 1997 to 2022



Argentina keeps beef export ban in place until 2024

January 2023



Global risks ranked by severity over the short and long term

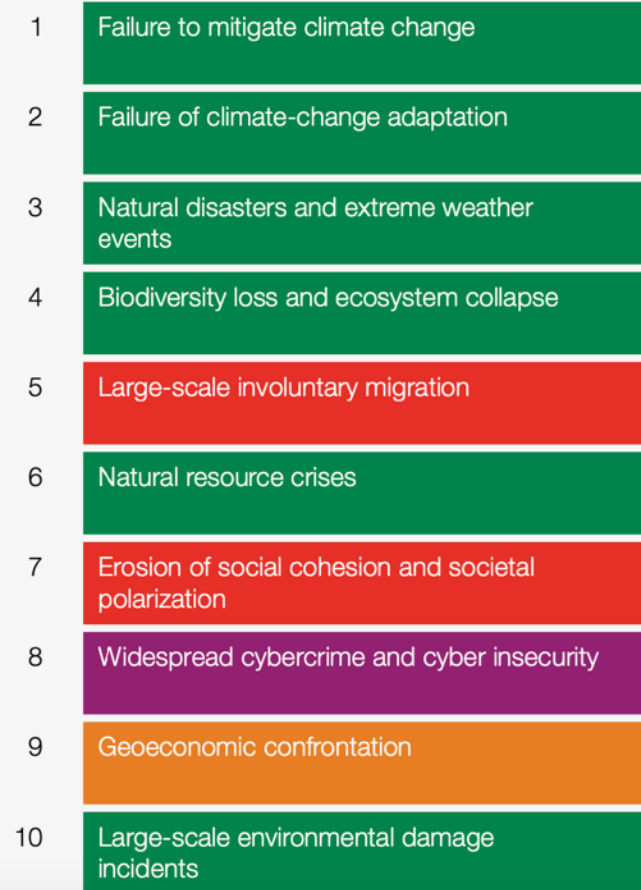
"Please estimate the likely impact (severity) of the following risks over a 2-year and 10-year period"



2 years



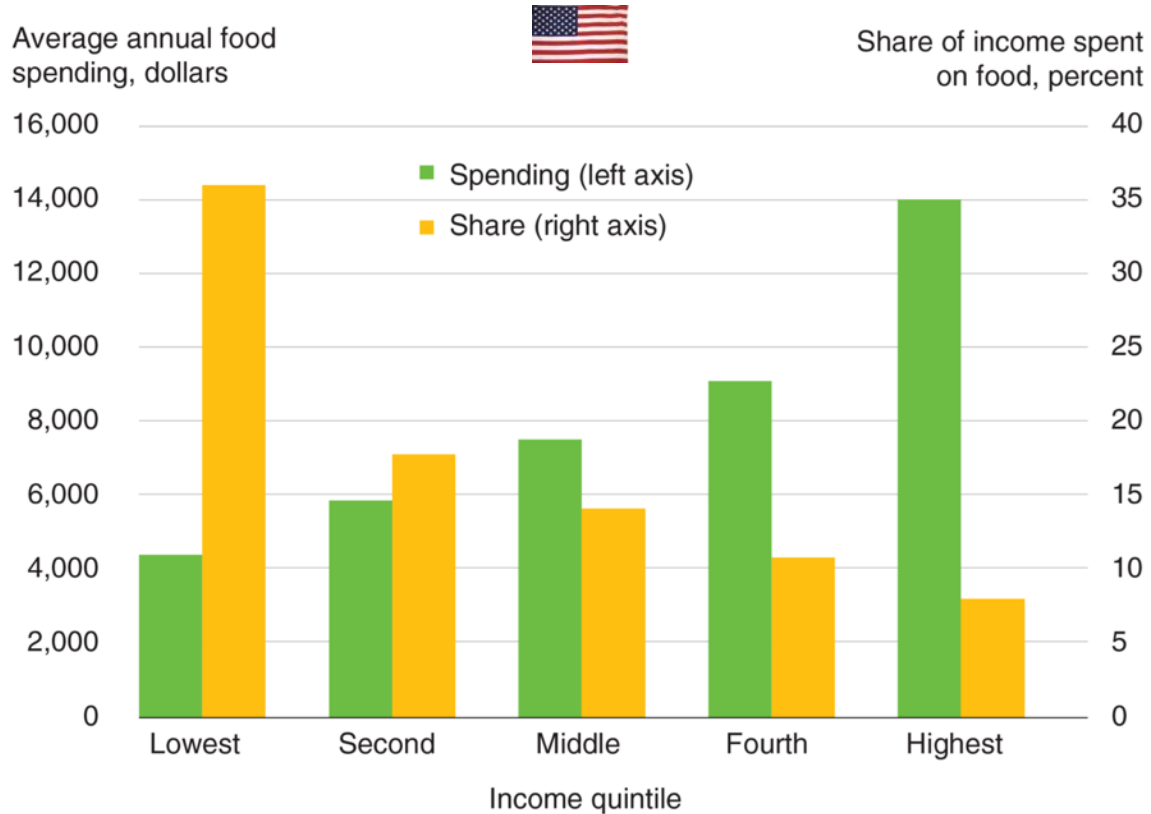
10 years



**The Global Risks
Report 2023
18th Edition**

January 11th, 2023

“ ... predicts persistent polycrises of food, energy & fertilizer shortages during the next 2 years ... food system failures are unavoidable and society can expect further food price spikes as the cost of living crisis continues”.

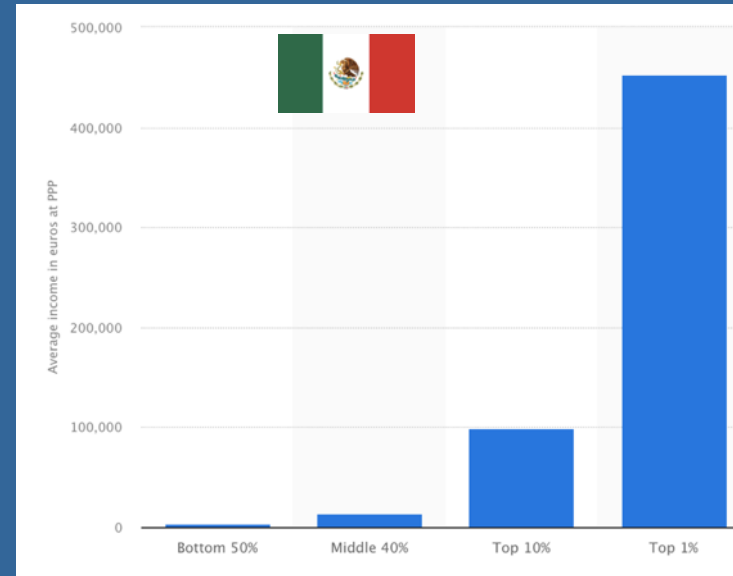


Source: USDA, Economic Research Service using data from the U.S. Bureau of Labor Statistics, Consumer Expenditure Survey 2019.

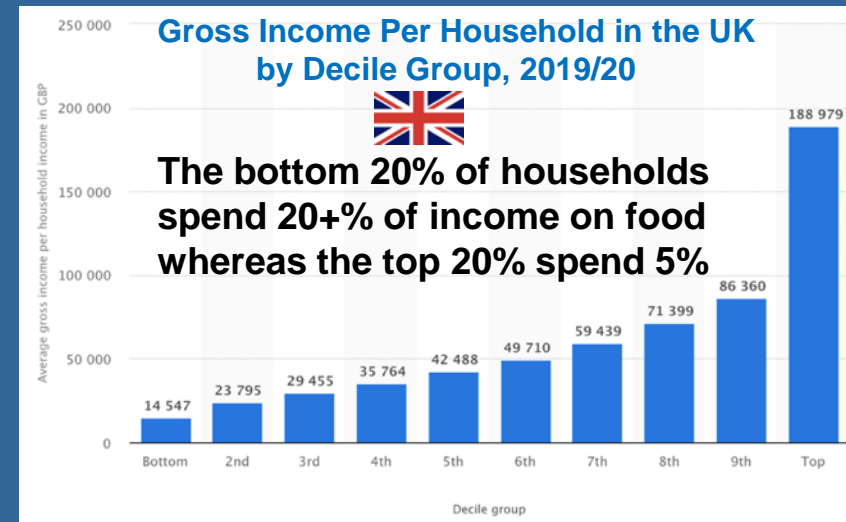
The Lowest 20% of Households Spend 37% of Their Income on Food Whereas the Top 20% Spend 7% of Their Income on Food

The "Haves" and "Have Nots"

Average income in Mexico in 2021, by income percentile



The top 10% of households are comfortable whereas 90% are in trouble!



The bottom 20% of households spend 20+% of income on food whereas the top 20% spend 5%

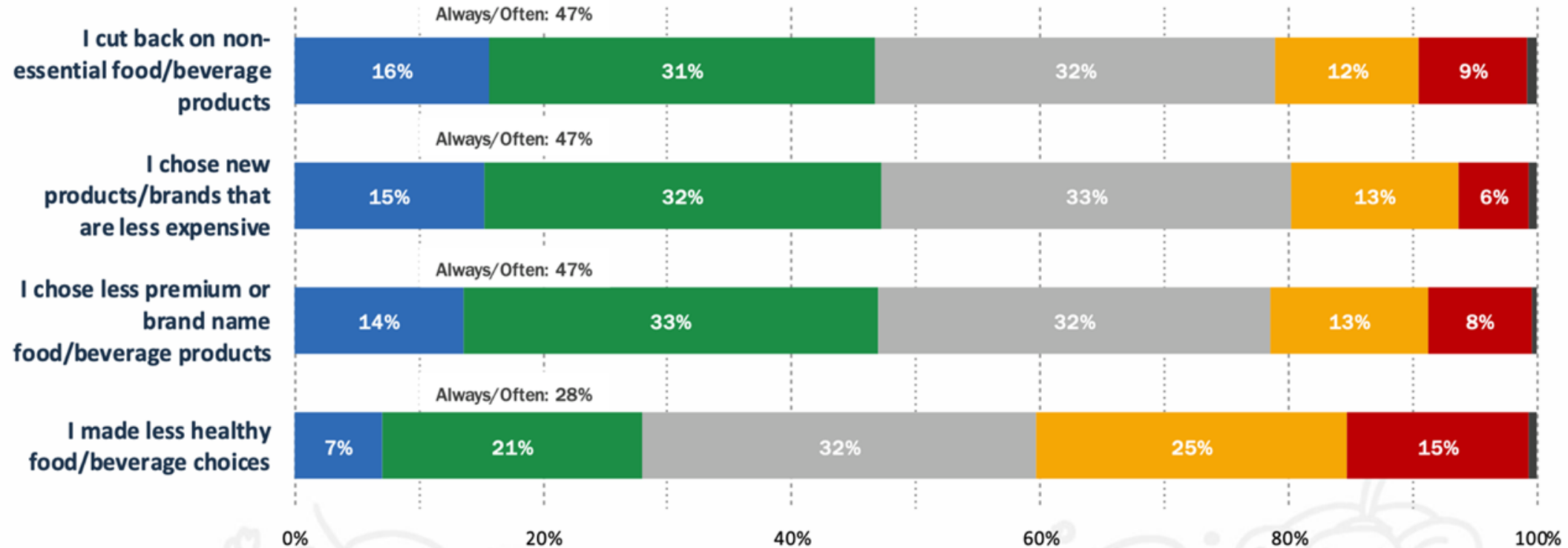
Nearly half who saw an increase say it always/often impacts purchasing



Three in ten say they have made less-healthy choices. Younger generations are more likely to cut back on non-essential items than their older counterparts.

Impact of Increased Cost on Food/Beverage Purchasing (If Observed an Increase)

Always Often Occasionally Rarely Never Not sure



Q11 Over the past year, how often did the increased cost of food/beverages lead to the following? Filter: Have noticed an increase in the overall cost of food and beverages in the past year (n=920)

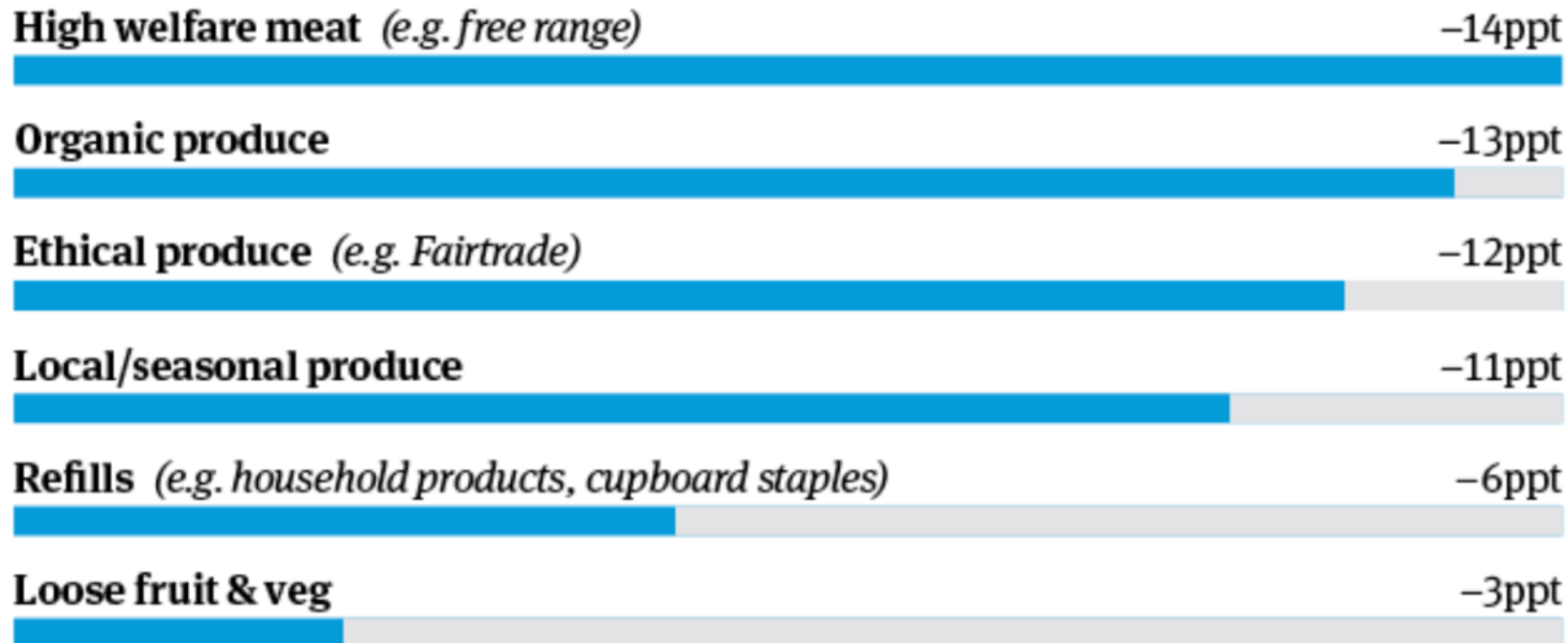
Shoppers giving up on organic and healthy foods to cope with cost of living

Survey undertaken
August 2022



The Grocer

Since February 2022, have you bought any of these products? *(compared to pre-cost of living crisis)*



Source: Lumina Intelligence survey of 1,000 UK adults



In the EU, p.c. fresh produce consumption down by 10% in 2022/23: Germany -12%; Spain -10%; UK -5%; USA -4%.
Fruit & Veg. seen as being expensive. Frozen sales spike!



How Low Can You Go?!



Hard Discounters, Aldi and Lidl, Drive Coruscating Retail Food Price War in UK



Hearty Food Thin
Pepperoni Pizza 314G

[Write a review >](#)

[Rest of shelf >](#)



Aldi Price Match

£0.75 £0.24/100g



Hearty Food Thin Cheese
& Tomato Pizza 314G

[Write a review >](#)

[Rest of shelf >](#)



Aldi Price Match

£0.75 £0.24/100g



2+
days

H W Nevill's White Bread
800G

[Write a review >](#)

[Rest of shelf >](#)



Aldi Price Match

£0.39 £0.05/100g



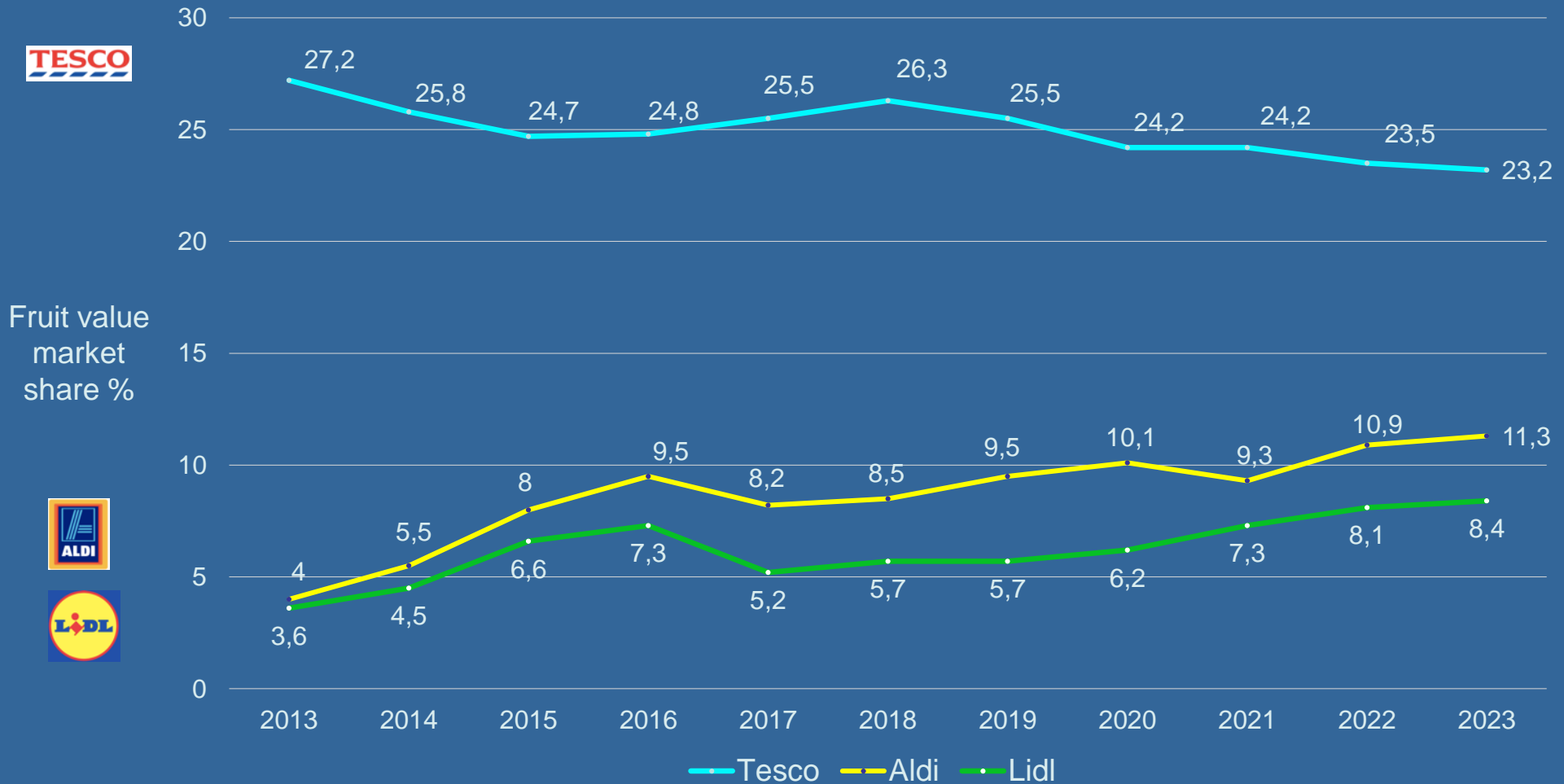
Pizzas for <\$1.00 and Sliced Bread for \$0.50. Really?!

Europe's top 10 grocery retailers: sales growth 2022-27





Fresh Produce Retail Value Market Share for Tesco, Aldi & Lidl 2013-2023*



Source: Kantar UK to w/e June 11th, 2023

In 2022/23, Lidl/Aldi had 18.7% share of “high value” UK retail blueberry market



Life in 2023 “Every Country”:
Food for “The Haves and The Have Nots”

Oliver: “Please Sir, I Want Some Fruit”.

Workhouse Master: “WHAT!”
(grudgingly) “OK but you can only have
Aldi price-matched apples and, certainly,
NO blueberries for you.”

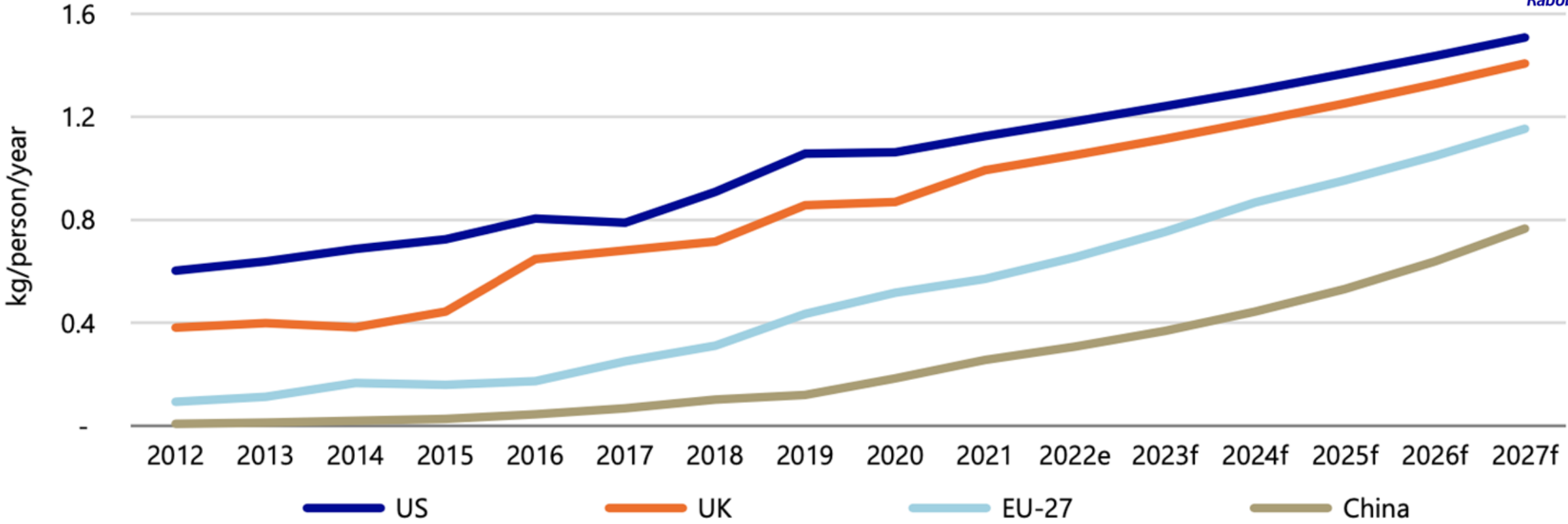
“Starvation in the Workhouse”, Henry Furniss 1910
Courtesy of The Victorian Web and Apologies to Charles Dickens

Dr. Food @ProfDavidHughes

The spectre of a Dickensian workhouse Christmas beckons for income “Have Not” households. Thank goodness for chicken but what about chicken producers? £2.90/kg. in UK (\$US1.58/lb.) defies economic logic in the face of spiralling input costs. Eggs are being rationed, chicken next?

By Most Measures, Future Demand for Blueberries Looks Excellent

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



Source: Trade Map, USDA, Rabobank estimates 2022



Canada has double the blues pc of the USA

Value Share of the UK Retail Fruit Bowl 2007 versus 2023



Retail Fruit Value 2007 £3,671 million		Retail Fruit Value 2023 £6,203 million	
	%		%
Apples	18.7	Berries	27.6
Berries	18.3	Apples	15.0
Bananas	15.7	Grapes	14.3
Citrus	14.2	Citrus	13.3
Grapes	12.5	Tropical Fruit	10.0
Tropical Fruit	9.2	Bananas	9.9
Stone Fruit	6.8	Stone Fruit	6.0
Pears	4.6	Pears	3.7



OR



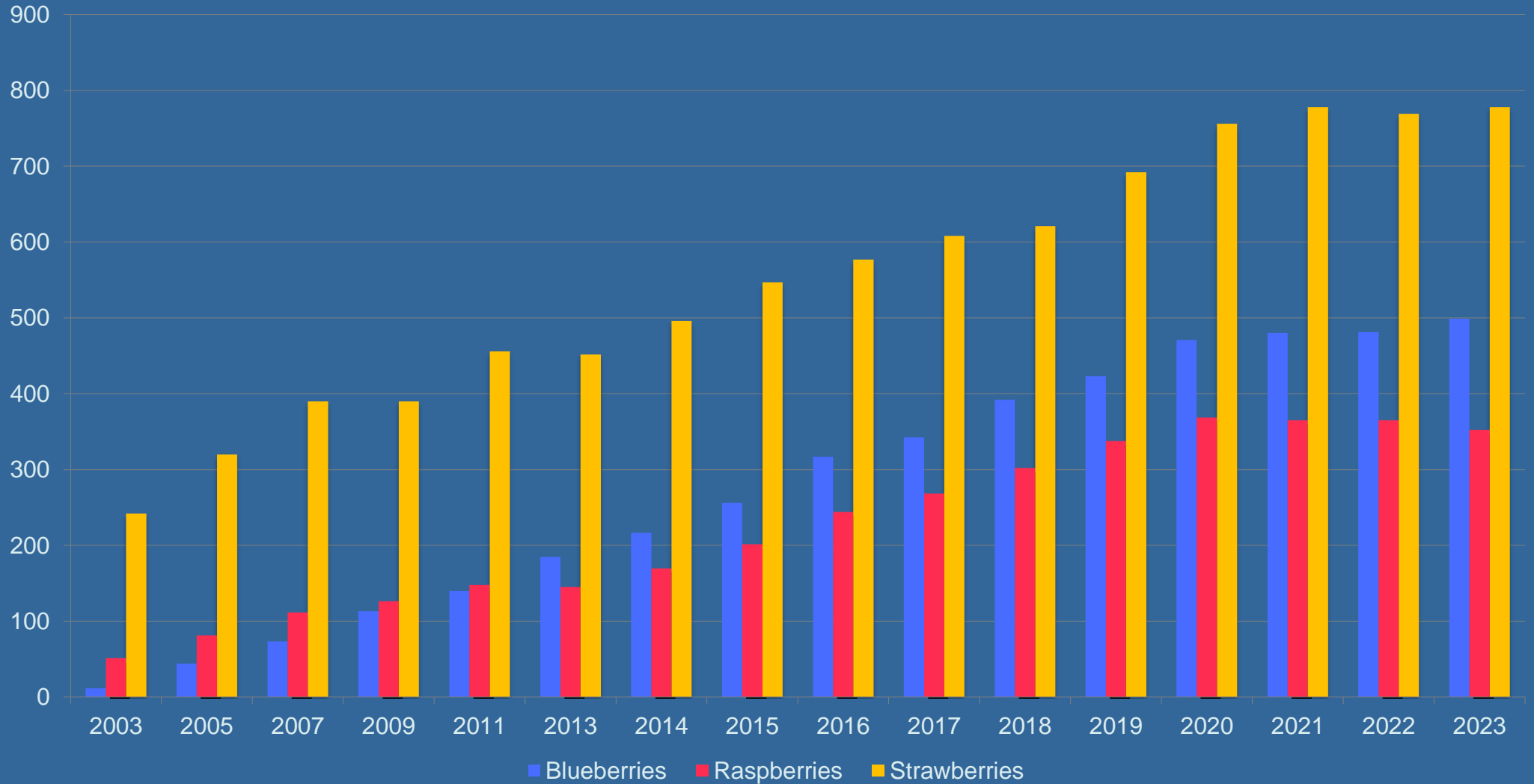
Average Weekly Household Spend
£2.80

Average Weekly Household Spend
£4.50

In 2023, Average Weekly Household Spend on Fresh Fruit & Veg. was £8 (\$10) - About 3 Takeaway Coffees!

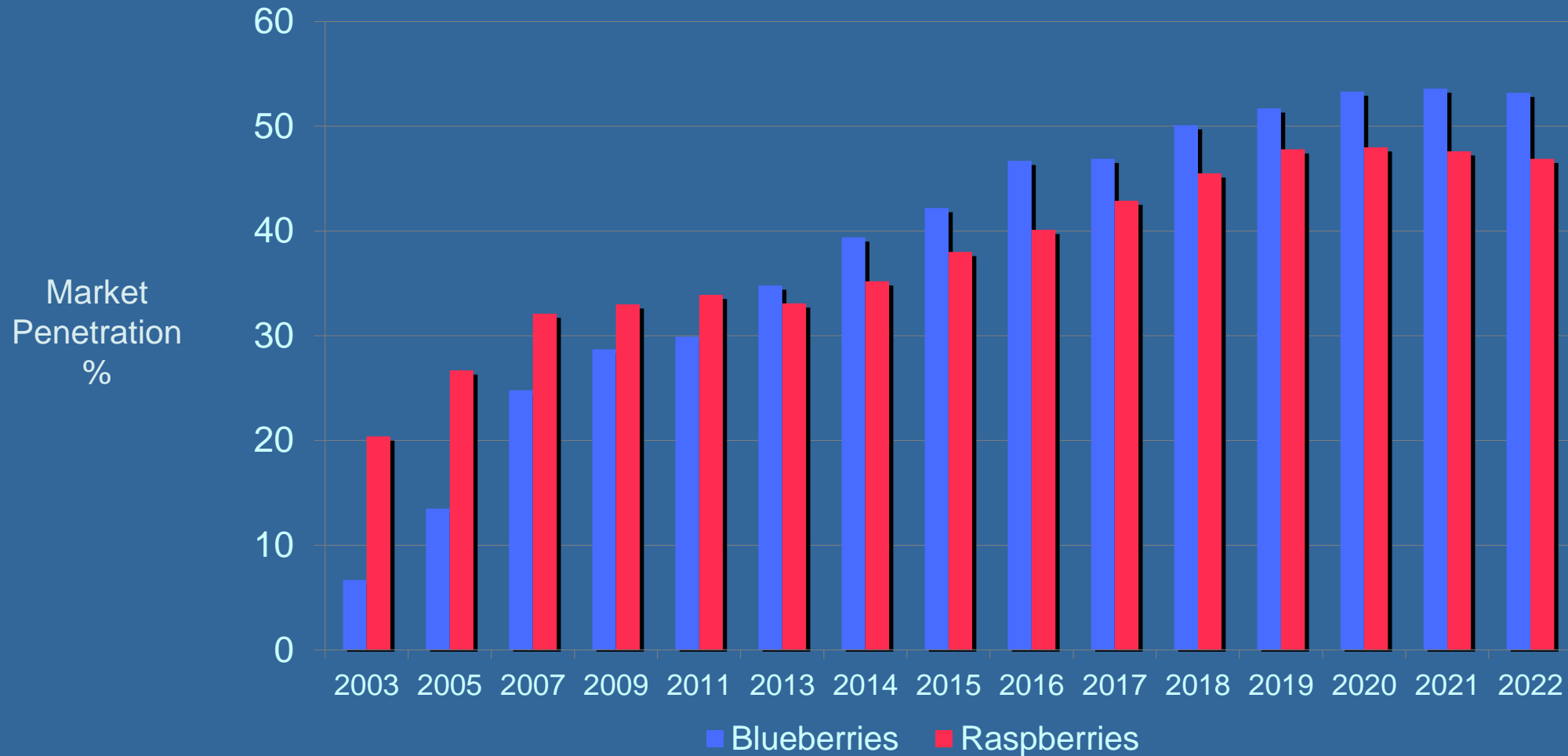


Growth in Retail Sales of Strawberries, Blueberries & Raspberries UK Market 2003-2023, £ Million



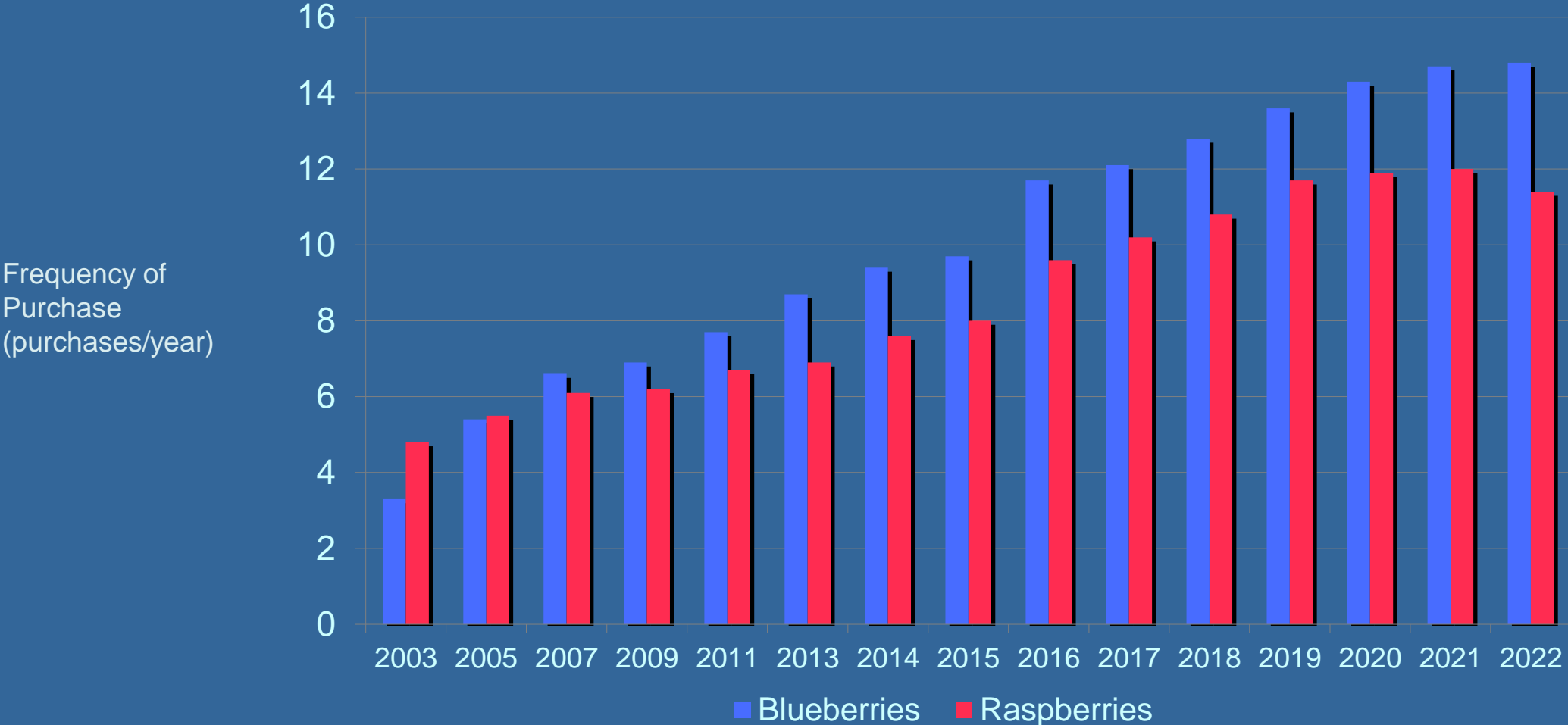
Source: Kantar WorldPanel (UK) to w/e April 16th, 2023

Growth of Blueberry and Raspberry Market Penetration UK Retail Market, 2003-2022



Source: Kantar Worldpanel (UK)

Frequency of Purchase of Blueberries and Raspberries, UK Retail Market, 2003-2022



Source: Kantar Worldpanel (UK)



Tesco Blueberries 350G

[Write a review >](#)

[Rest of shelf >](#)

£2.50 £7.14/kg \$9.06



Tesco Blueberries 250G

[Write a review >](#)

[Rest of shelf >](#)

Clubcard Price **£2.40 Clubcard Price**

Offer valid for delivery from 27/06/2023 until 17/07/2023

£3.00 £12.00/kg \$9.60

\$9 to \$22/kg range



Tesco Finest Blueberries 150G Class 1

[Write a review >](#)

[Rest of shelf >](#)

£2.50 £16.67/kg \$21.17



Tesco Organic Blueberries 150G







[Write a review >](#)

[Rest of shelf >](#)

£2.60 £17.33/kg \$22.00



No Product Attributes Communicated on Regular "Blues". Limited on Premium "Blues"

 <p>Featured Sainsbury's Blueberries 150g</p> <p>★★★★☆ (132)</p> <p>ALDI PRICE MATCH* </p> <p>£1.59 £10.60 / kg</p>	 <p>Featured Sainsbury's Blueberries 300g</p> <p>★★★★☆ (132)</p> <p>£2.85 £9.50 / kg</p>	 <p>Sainsbury's Blueberries 500g</p> <p>★★★★☆ (132)</p> <p>£4.50 £9.00 / kg</p>	 <p>Sainsbury's Frozen Blueberries 400g</p> <p>★★★★☆ (63)</p> <p>FROZEN</p> <p>£2.50 63p / 100g</p>	 <p>Sainsbury's Blueberries, Taste the Difference</p> <p>★★★★★ (2)</p> <p>£2.30 £1.53 / 100g</p>
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Indicative Price range/kg: frozen blues \$8; regular \$11.40; premium \$19.40

In the UK, “Premium” Blueberries are Crisp, Plump (size) & Sweet or Hand-Picked on “Select Farms”!



Regular “Blues” are Just Regular!




Fruit is Largely Private Label with Premium Produce being Premium Private Label!




“Have/Have Not” in USA, Too Little or No Communication on Fresh Blueberry Attributes

Indicative Price Range/kg:

- \$9-9.50 larger frozen packs
- \$10.26 larger pack regular
- \$23.47 small pack organic



\$5⁴⁹
 EBT SNAP EBT
 Fresh Blueberries
 18 oz **510 grms.**



\$3⁴⁹
 EBT SNAP EBT
 Fresh Blueberries
 1 pt **340 grms.**




Frozen




\$8.98/kg



In USA, most premium blues are private label



\$3⁹⁹
 EBT SNAP EBT
 Simple Truth Organic™ Fresh Blueberries
 6 oz **170 grms.**



\$6⁹⁹
 EBT SNAP EBT
 Simple Truth Organic™ Fresh Blueberries
 18 oz **510 grms.**



\$9.50/kg



+ Add

\$7.84 16.3 ¢/oz

Great Value Blueberries, 48 oz
(Frozen)



+ Add

\$8.66 21.7 ¢/oz

Great Value Frozen Wild Blueberries,
40 oz



Frozen Blues in Walmart
Online June 28th, 2023

The frozen blueberries
provide a great “value”
alternative to fresh during
a cost-of-living crisis!

If you’re cooking a pie or
making a smoothie, why
wouldn’t you choose frozen?

\$5.75 to \$7.65 per kg.



What's More, the Branded Blues SHOUT about Their Health & "Green" Advantages Relative to "Ordinary Blueberries"!

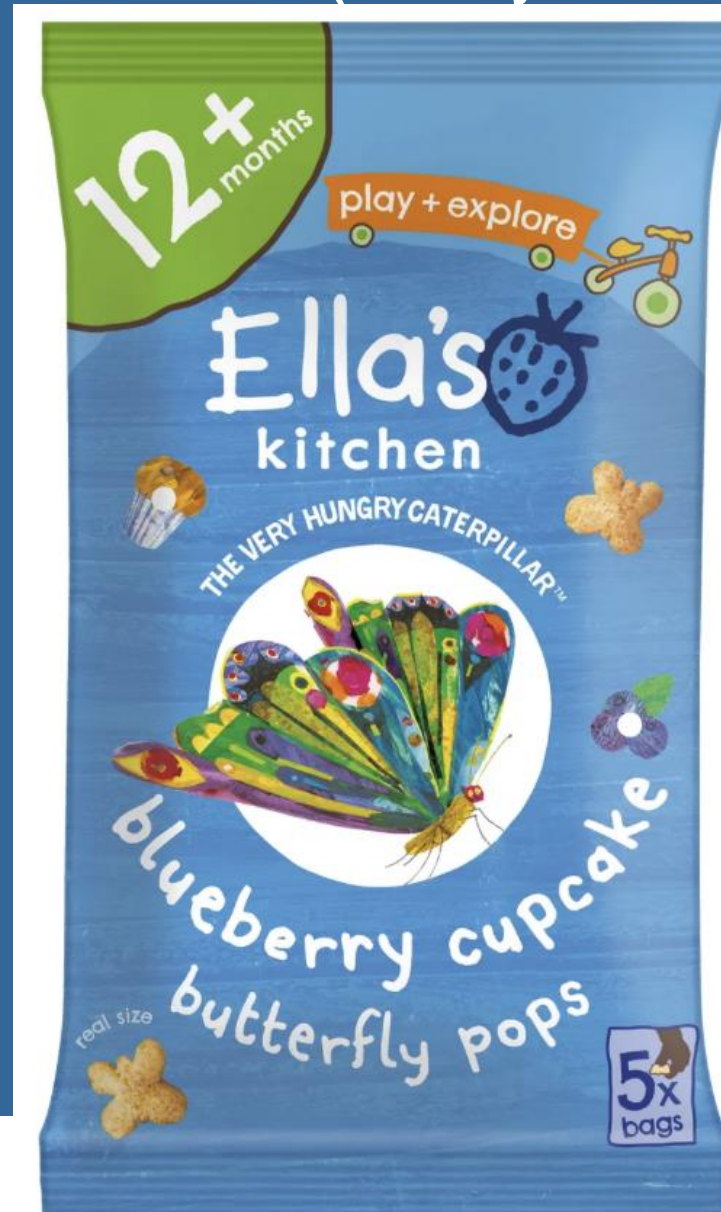




INGREDIENTS

Ingredients: Enriched flour (wheat flour, niacin, reduced iron, vitamin B1 [thiamin mononitrate], vitamin B2 [riboflavin], folic acid), corn syrup, high fructose corn syrup, dextrose, soybean and palm oil (with TBHQ for freshness), sugar, bleached wheat flour. Contains 2% or less of wheat starch, salt, dried blueberries, dried grapes, leavening (baking soda, sodium acid pyrophosphate, monocalcium phosphate), dried apples, citric acid, modified wheat starch, gelatin, yellow corn flour, natural and artificial flavor, xanthan gum, soy lecithin, caramel color, cornstarch, turmeric extract color, red 40, blue 2, blue 1, color added.

Processed Food with “blueberry ingredients” (<2%!)
Ride on the Coat-Tails of Your Health Credentials
(which you are too shy to talk about!)



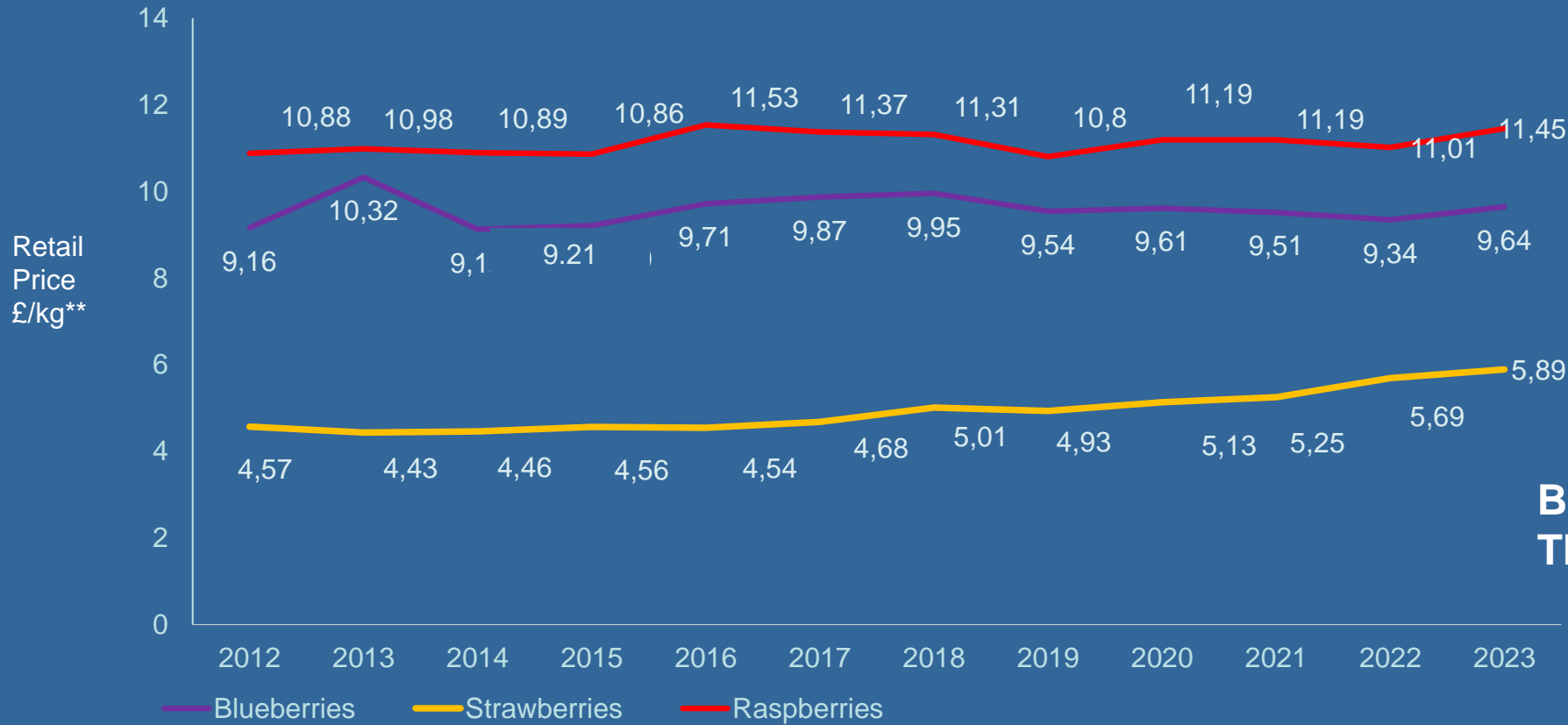
ingredients

and loads more good stuff..

Organic maize flour 67% | Organic rice flour 12% | Organic vegetable oil (sunflower, rapeseed) 10% | Organic dried bananas 4% | Organic quinoa flour 3% | Organic dried blueberries 2% | Organic dried apples 2% | Natural flavouring* <1% | Natural vanilla flavouring* <0.1% | Thiamin (Vitamin B1)* <0.1% | Other stuff 0% I
may contain gluten, milk + soya



Average Retail Price for Fresh Strawberries, Blueberries & Raspberries in UK 2012-2023* (£/kg)



**Biggest Threat for Produce?
The Dreaded Commodity Trap!**



**For 10+ Years, Retail Blueberry & Raspberry Prices have been as Flat as Pancakes!
However, UK Field Labour & Other Key Costs have Increased by over 50%.**

Over-Cooked Global Supply?

The Wheel of Grocery Retailing Continues to Turn!



1920



2020s



Online Shopping Behaviour Different to In-Store? More Likely to Repeat Purchase and Less Likely to Browse. Not Exposed to the Theatre that Fresh Fruit Merchandising can Create which Encourages Impulse Purchases







Emerging, and Sometimes Stumbling, New Routes to the Food & Drink Consumer

Delivering: Restaurant Meals, Groceries and More



Meal Kits and "Ready Meals"



"Super Fast" Guys



HelloFresh achieved new quarterly revenue high of \$3bn in 1st Q 2023

A brand that delivers



Offset Guilt of Cookies with Innocence of Blues!



**GEN-Z
COMMUNITY**



**OWN THE
NIGHT
BRAND**



**DIGITAL
FIRST**



**DELIVERY
EXPERTISE**



**ASSET LITE
MODEL**



**HIGHLY
PROFITABLE**

Our cult brand meaningfully connects with a highly attractive demographic through delicious, craveable and creative products

Our digital ecosystem powers our brand and delivery core competency allowing us to reach 100+ million with warm, delicious cookies

Our best-in-class unit economics provide the blueprint for efficiently scaling our business throughout the US and beyond

~50%
18-24 Age

~80% Sales
after dark

~50% Digital
Revenue

30 minutes
or less

~1 Yr Payback

~30% 4-wall
Margin

Distillation of 2023 Global Consumer Trends

- Budgeteers Redefining Value: affordable & healthy supportive of “my values”
- “Unpuzzle” Health: Adding Positives Rather Than Just Removing Negatives
- Transparency Traceability Sustainability Authenticity
- Eco-economy (on food waste, plastic, energy, water, etc.) Positively Imperfect
- Consolidation of Hybrid Working (negative impact on food service)
- Quick Quality and Convenience
- Here and Now Revenge Spending (guilt-free indulgence)
- Trusted Traditional but Excite Me!
- Generational Push – looking after Digital Natives - Gen. Z (on issues & digital)
- Simplified Plant-Based (i.e. NOT multi-ingredient, over-processed fake meat!)

Consumers seek moments of happiness

- 62%** are seeking everyday moments of happiness they can enjoy
- 51%** are choosing smaller everyday treats to consume
- 3 in 5** say snacking boosts their emotional wellbeing



Source: Innova Consumer Trends 2023 Report – Balancing Priorities, Innova Snacking & Healthy Snacking Survey 2023

Changing attitudes to health

2 in 5



Consumers say the desire to 'feel well' has driven them to seek a healthier lifestyle

61%

Say healthier living means following a healthy, nutritious diet



Younger groups more likely to use food for positive health and mental wellbeing



Source: Innova Consumer Trends 2023 Report – Balancing Priorities



Top-Tier Considerations When Choosing Which Food and Beverage Products to Buy

The Hartman Group's *Brand Ambition: Food and Beverage Private Brands & Beyond* report finds that consumers consider **taste, price and quality** as the first-tier criteria when choosing which foods and beverages to buy.

Top Five Selection Drivers

(Among Category buyers, Average across 8 profiled categories)



To choose a product, consumers want to know how it will **satisfy taste expectations**, whether it is offered at an **acceptable price** point, the **product makeup** and **provenance**. **Brand plays a supporting role**, often standing in for a constellation of properties consumers seek, including distinctive taste experiences.



Source:
Brand Ambition: Food and Beverage Private Brands & Beyond report



And don't forget:

- Convenience
- Health (if I remember)
- Values-related issues (when they're affordable)



On the Rebranding of Driscoll's Berries

August 2016

An Interview with Soren Bjorn:

“We interviewed consumers all over the world and what we wanted was to find out from them if there was anything special about berries. What came back was surprising .. you couldn't tell where the consumer was – you would literally have a consumer in Shanghai writing about berries and you couldn't tell that it wasn't somebody from Bondi (Australia), Amsterdam or New York. Most associations with berries had to do with Summer, joy and bringing people together. Berries make people feel happy!”.

Comment:

As a relatively new fruit in many markets, blueberries are MUCH LESS seasonal in demand and, so, don't share that “best in Summer” perception that strawberries do. Also, blueberries substantially outperform other berries on perceived health benefits. YET, they carry the same fun loving/friends together aura that other berries do. Brilliant!



Attributes of “Sweetest Batch”:

- Deep blue colour
- Crisp with a “pop”
- Perfectly snackable size
- Well-rounded aroma
- Extra sweet flavor
- Family and fun

**Pre-Covid Launch (later-2019).
Now, Family Health Benefits
would have Higher Profile?
For Sure. Certainly in China.**

In the USA, Academic Research Indicates the Following Preferred Attributes of Blueberries*:

- Freshness
- Juiciness
- Sweetness for some, tartness for others
- Intense blueberry flavour
- Texture – crisp (not mushy)

Blueberry health benefits are many:
positive but complicates messaging!

Demographic Profile of “Heavier” Purchasers in USA**:

- Older (50+ yrs.) driven by health concerns
- Higher income
- White and Hispanic
- 2+ children in family

Specific Health Concerns Should be Addressed to Specific Consumers:

- Skin health (ALL women)
- Eye health
- Lowering blood pressure/heart concerns
- Managing diabetes
- Cancer risk reduction
- Weight loss
- Healthy digestion
- Improving mental health

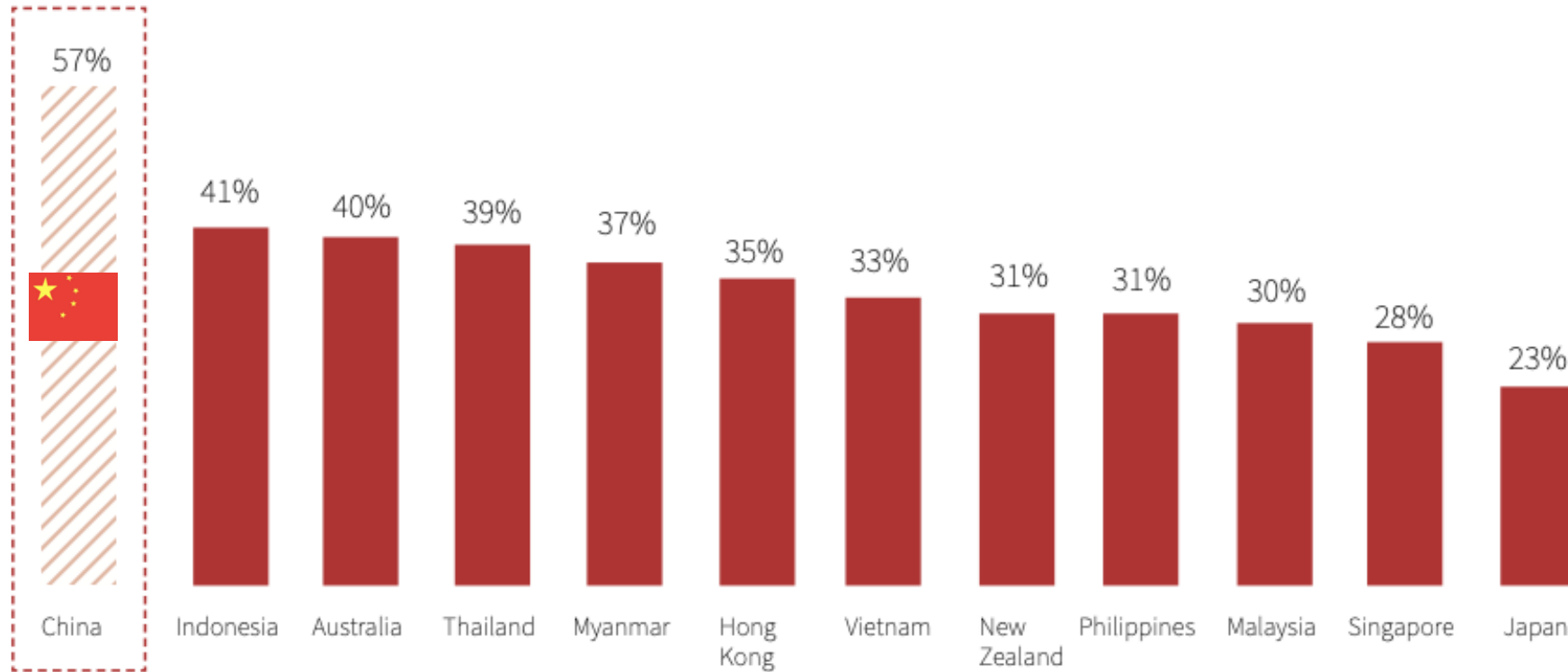


• Yue & Wang (2017): Consumer Preferences for Fresh Blueberry Attributes, Acta Hort. 1180, pp. 1-8

** The Packer Fresh Trends 2021/2

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

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



Source: PwC Survey 2020

Consumers likely to pay a premium for better quality healthier food in the next 12 months



Source: PwC Survey 2020

And, in Some Markets, “The Haves” will have Ability & Willingness to Pay. Mind you, it would be VERY Helpful if We Told Them Why Our Products Deserved a Substantial Premium Other than being Just Pricier!

Don't be Shy about Promoting the Many Attributes of Fresh Blueberries.

¹¹ International Diabetes Federation. (2019). IDF Diabetes Atlas.

¹² OECD. (2020). OECD-FAO Agricultural Outlook 2020-2029. OECD

¹³ Pisuthippan, A. (2019). The problem of Thailand's sweet tooth. Bangkok Post

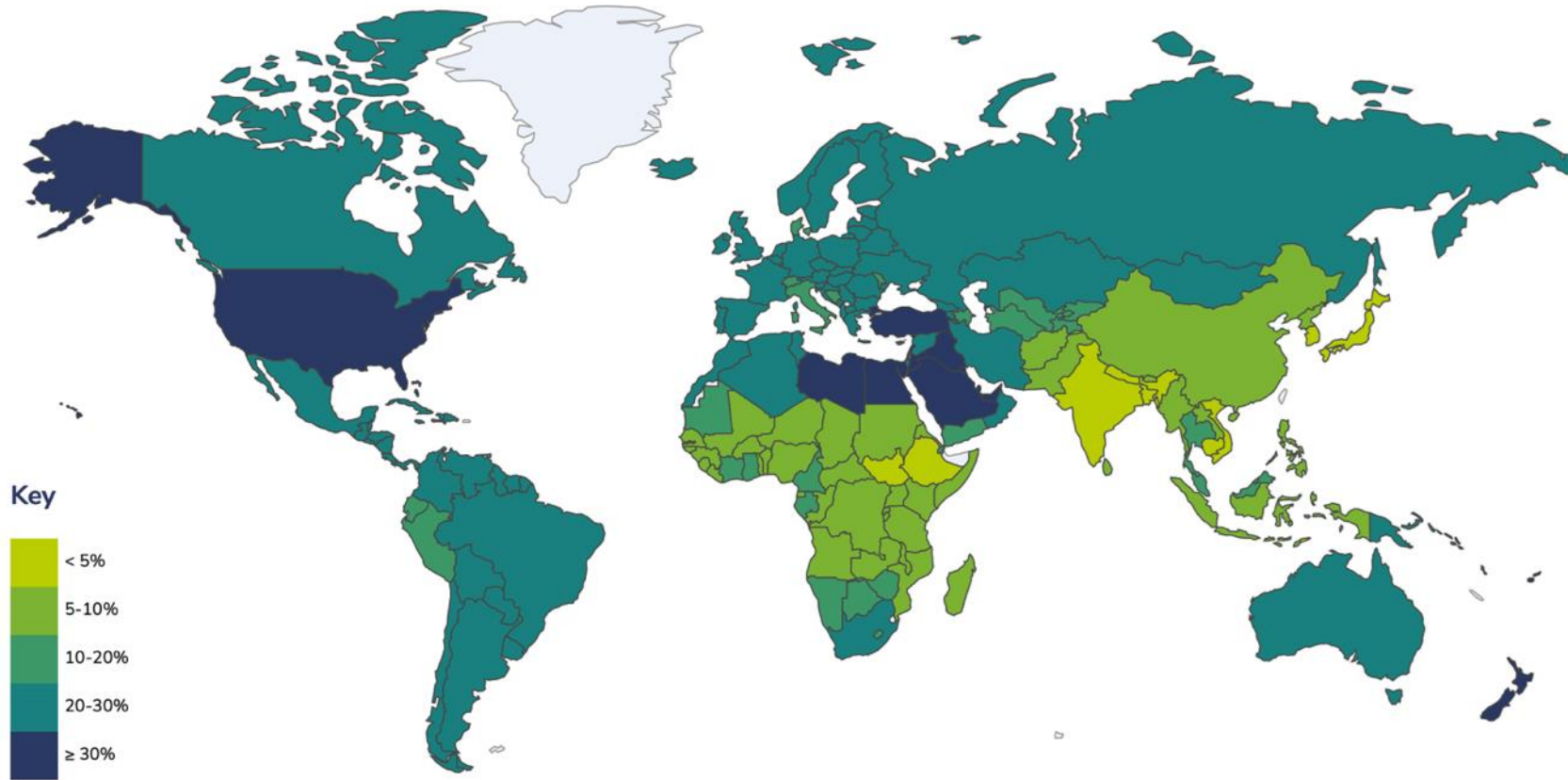
¹⁴ Ministry of Health. (2019). MOH TO INTRODUCE MEASURES TO REDUCE SUGAR INTAKE FROM PRE-PACKAGED SUGAR-SWEETENED BEVERAGES; Khalik, S. (2019) War on diabetes: Unhealthy label for high-sugar drinks, total ban on ads to be introduced in Singapore. The Straits Times



THE POWER IS ON YOUR PLATE

Estimates of prevalence of obesity in adults

Obesity BMI ≥ 30 kg/m². All adults



Source: Global Health Observatory Data Repository <https://apps.who.int/gho/data/node.main.A900A?lang=en> (last accessed 14.06.21)

The bigger, the worse

World, overweight and obesity forecasts

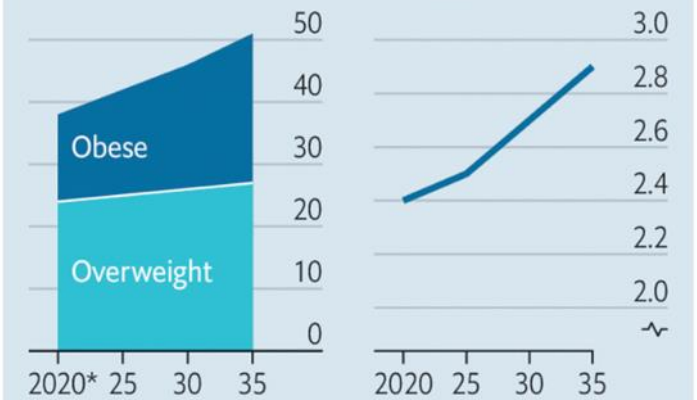
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Share of population

%

Economic cost

% of GDP



Source: World Obesity Federation

*Estimate

The Economist

The proportion of consumers who say the following.

Global

74%



I am concerned about the state of the environment

66%



Food, drink and supplement brands should be doing more to protect the planet

49%



I have made changes to my diet in the last two years to lead a more environmentally-friendly lifestyle



DOSSIER DE PRESSE

LE B.A.B.A du mieux MANGER!



= **Goûter**
équilibré noté B

Voir composition détaillée à la fin

Carrefour and Colruyt Introducing Nutri-Scores On Private Label Products



How Would



Score?

Brilliantly!

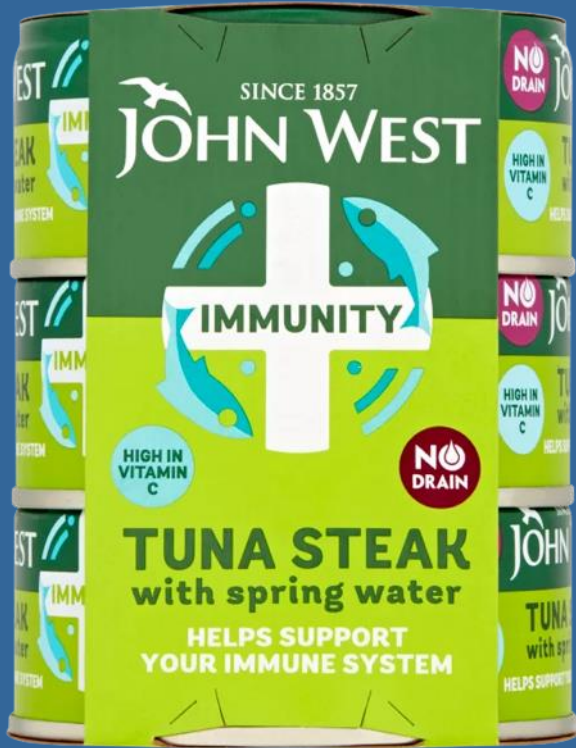


- The majority of Nestlé's traditional food and drinks do not meet a "recognised definition of health."
- Just 37% of its consumer food and beverage products meet international health standards.
- The global food company acknowledged the issue in an internal presentation seen by the Financial Times.



Imperial College
London

Don't Be Shy: Shout About Your Product's Health Benefits!





Fresh Produce with Immunity Benefits But Too Shy to Make Claims



Chobani doubles down on probiotics as consumers seek immunity-boosting products

December 15th, 2020

The dairy giant is debuting a line of yogurt cups and drinks that spotlight the microorganisms, as well as an extension geared toward children.





BAI ANTIOXIDANT INFUSION VARIETY PACK

- 1 Gram of Sugar
- No Artificial Sweeteners
- Antioxidant Infused

15 PACK

ANTIOXIDANT BEVERAGES WITH VITAMIN C | 15 x 18 FL. OZ BOTTLES (270 FL. OZ.) | 15 x 530 mL BOTTLES (7.95 L)

FLAVORS WITH OTHER NATURAL FLAVORS

Cheat death.

The antioxidant power of pomegranate juice:



©2011 Ferrisburgh LLC. All rights reserved. POM Wonderful and The antioxidant power of pomegranate juice are trademarks of Ferrisburgh LLC.

Heart therapy.

POM Wonderful. The Antioxidant Superpower.



Life support.

The antioxidant power of pomegranate juice:

©2011 Ferrisburgh LLC. All rights reserved. POM Wonderful and The antioxidant power of pomegranate juice are trademarks of Ferrisburgh LLC.



I'm off to save
PROSTATES!



"...Natural Fruit Product with Health Promoting Characteristics." - FTC Judge

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Economist**

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Weekly edition

The world in brief

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My Economist ▾



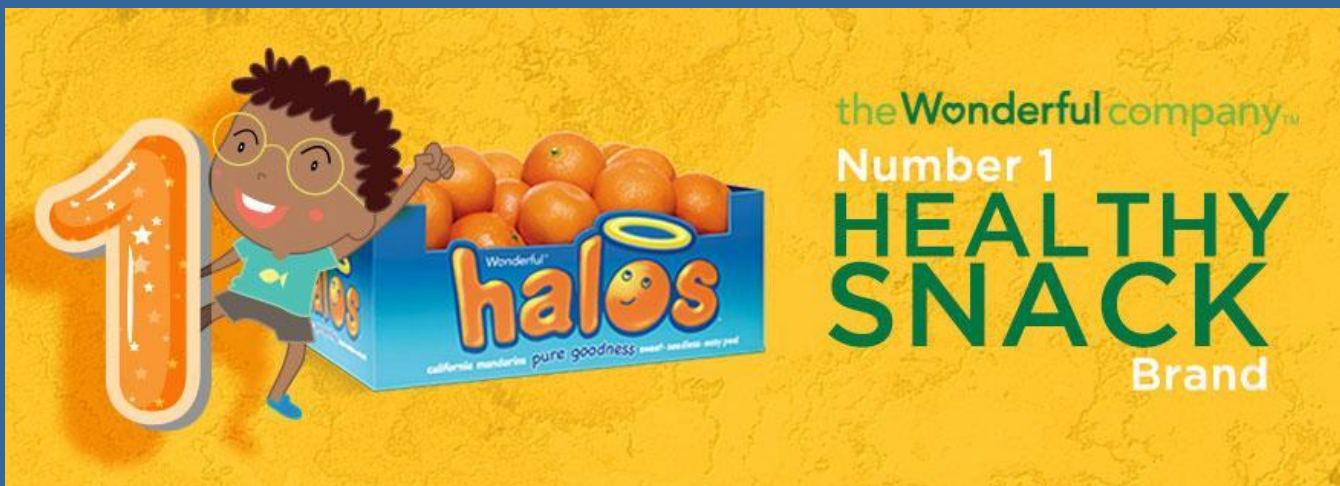
Next Year in Moscow
A podcast about Russia's future



The A to Z of economics
Economic terms explained to you in plain
English



The Intelligence
Our daily podcast considers unrest in Sudan





The super simple superfood




BROCCOLINI

The super simple superfood



Shanghai Filmgoers Enjoy New Blue Pop Movie Snack with Blueberries from Chile

January 28th, 2019



Heart health

Measured by the handful



GRAB A BOOST OF BLUE

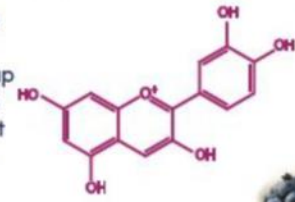


An easy way and nutritious solution to eating well – just grab a handful, rinse and enjoy!



BOOST YOUR DAILY RECOMMENDED SERVINGS OF FRUIT.

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



=



And Eco-Scores are Next Up!

LIDL TO HELP CONSUMERS GO GREENER WITH NEW ECO-SCORE TRIAL IN SCOTLAND



What will be Your Enviro-Score?



02 Feb 2023 --- A myriad of so-called eco-labels are being rolled out across various F&B products, but with no gold standard or strict rules governing precisely what the logos mean and what methodology is behind them, concerns are growing that they will confuse consumers and ultimately be counterproductive.



Fresh Del Monte Produce announces launch of carbon neutral pineapples

December 6th, 2022



July 9th 2021

SIIM hails Zero Carbon pineapple

French importer SIIM has announced the first 'Zero Carbon' pineapple, from its plantations in Ecuador to its Rungis facility in France

French importer SIIM, a subsidiary of Omer-Decugis & Cie, has announced the world's first 'Zero Carbon' pineapple.

By measuring and offsetting the carbon emissions from its plantations in Santo Domingo, Ecuador, to its platform in Rungis International Market in Paris, the Terrasol pineapple has been certified as carbon neutral by TÜV Rheinland in the first half of 2021.



Source: Del Monte

It is a new product line extension from the Del Monte Gold, HoneyGlow and Del Monte 'The Original' pineapple varieties, grown in Costa Rica

PepsiCo's Net Water Positive Vision

Reduce Use + Replenish More



Efficiency

Achieve **best-in-class¹** or **world-class²** water-use standards at all company-owned and third-party facilities by 2030

Over 11 billion
liters of water a year avoided¹

50% reduction⁴
in water use at PepsiCo sites³

Nearly half
of sites located in high-risk watersheds



Replenishment

Replenish more than **100% of water** used at all high-water-risk sites by 2030



Safe Water Access

Provide **100 million people** with safe water access by 2030



Alliance for Water Stewardship Standard

Adopt in **high-water-risk areas** where PepsiCo operates by 2025

¹ 1.2 liters of water per liter of beverage or 0.4 liters per kilogram of food (high-water-risk manufacturing sites only)

² 1.4 liters of water per liter of beverage or 0.4 liters of water per kilogram of food (all other manufacturing sites)

³ At company-owned manufacturing facilities in high-risk watersheds and compared to a 2015 baseline

⁴ Based on estimated reductions in water use at high-water-risk PepsiCo-owned facilities of 80% at snack facilities and 90% at beverage facilities against a 2015 baseline

⁵ At company-owned manufacturing facilities in high-risk watersheds and against a 2015 baseline



We're crafting the foods + beverages you love **with less water than ever.**



PEPSICO



PEPSICO FOUNDATION

We Feed Potential



Almonds: Angelic or Devilish?!

Have a paper-wrapped break with *KitKat*

January 11th, 2023



Mars bar plastic wrapper swapped for paper May 2023



So, What Took You So Long?!

Smarties becomes the first global confectionery brand to switch to recyclable paper packaging

January 26th, 2021

Mondelēz's Cadbury chooses recycled plastic over paper for new Dairy Milk chocolate wrappers

September 20th, 2021





Cardboard Recyclable



Recycle with Paper



Recycled PET reduces CO2 Footprint



FSC-certified Compostable Recyclable



Compostable



Home Compostable Film

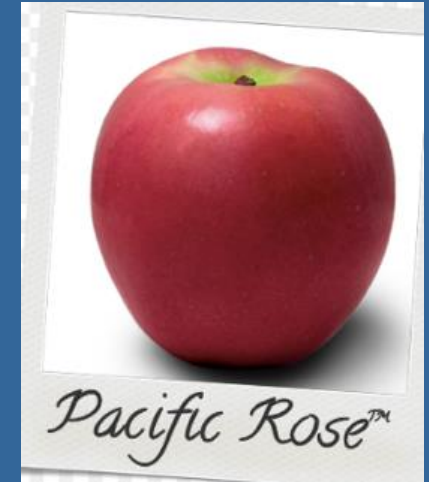


“How’d You Like Your Blueberries?”

“With Adjectives, Please”!

- Jumbo
- Varietal name
- Brand name
- Local
- Sweet or Tart
- Provenance
- Antioxidant-rich
- Organic
- Pesticide-free
- Carbon-zero
- Hand-picked
- Biodegradable (packaging)
- Cheap! (many of the income “Have Nots”)

The adjectives should be important to YOUR target market customer and most powerful if unique to your product.



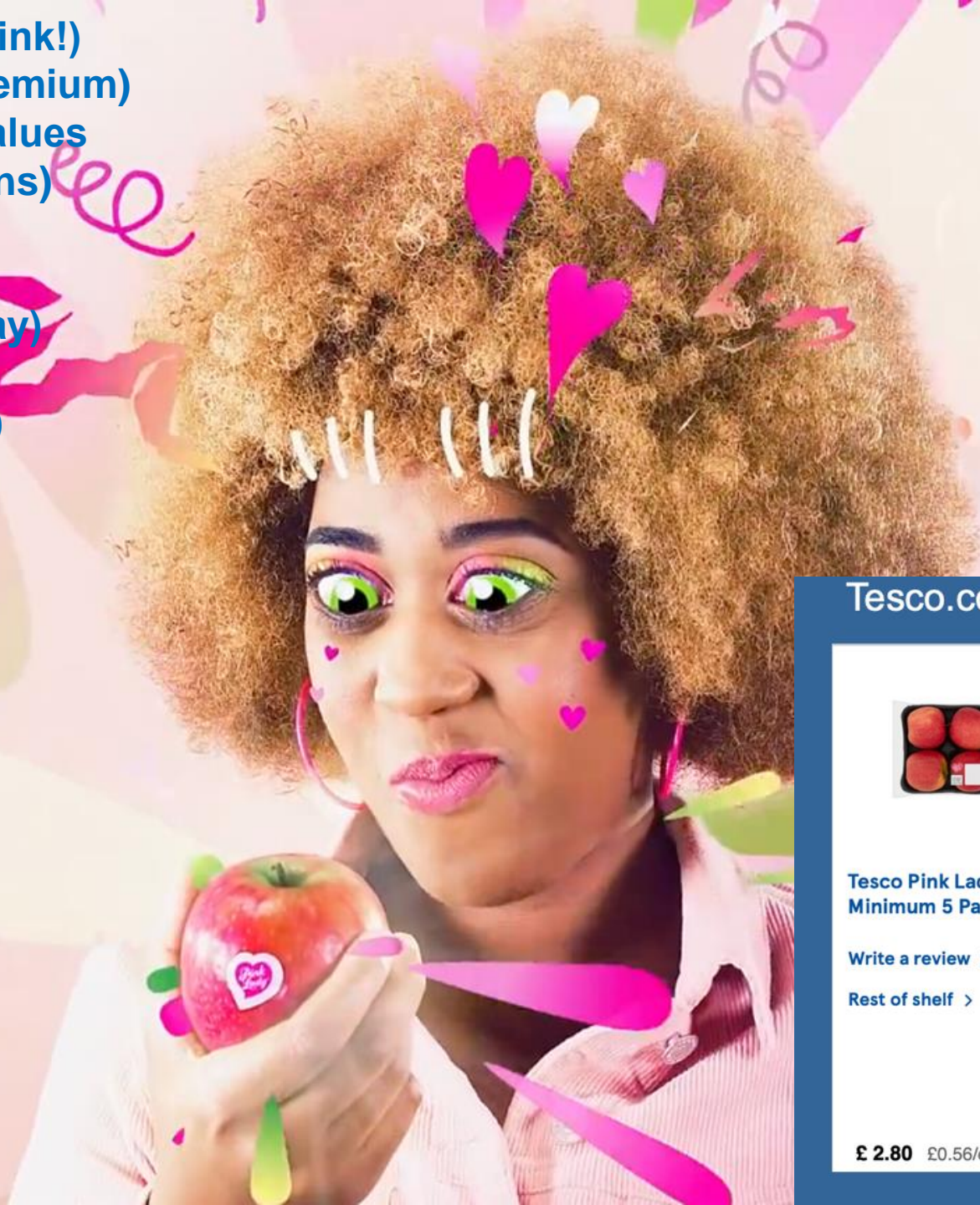
Apples and Kiwifruit with
Strong Brands and IP
Protection in Global Markets



Best in Class:

- R&D partnership with PFR to produce unique varieties that appeal to consumers
- Brand development globally
- Consumer focus on health in Asia
- Supply chain management excellence
- 52 week availability

- Identifiably different (It's Pink!)
- Clear marketing vision (premium)
- In tune with consumers' values (e.g. charitable contributions)
- 52 week availability
- High profile promotions (e.g. TikTok, Valentine's Day)
- Associated products (e.g. Pink Lady juice/chips)



Tesco.com Retail Prices for Apples



Tesco Pink Lady Apple
Minimum 5 Pack

[Write a review >](#)

[Rest of shelf >](#)

£ 2.80 £0.56/each



Rosedene Farms Gala
Apples 6 Pack

[Write a review >](#)

[Rest of shelf >](#)

Aldi Price Match



£ 0.93 £0.16/each

Jazz apples partner with DreamWorks Animation's new movie

April 13 , 2021



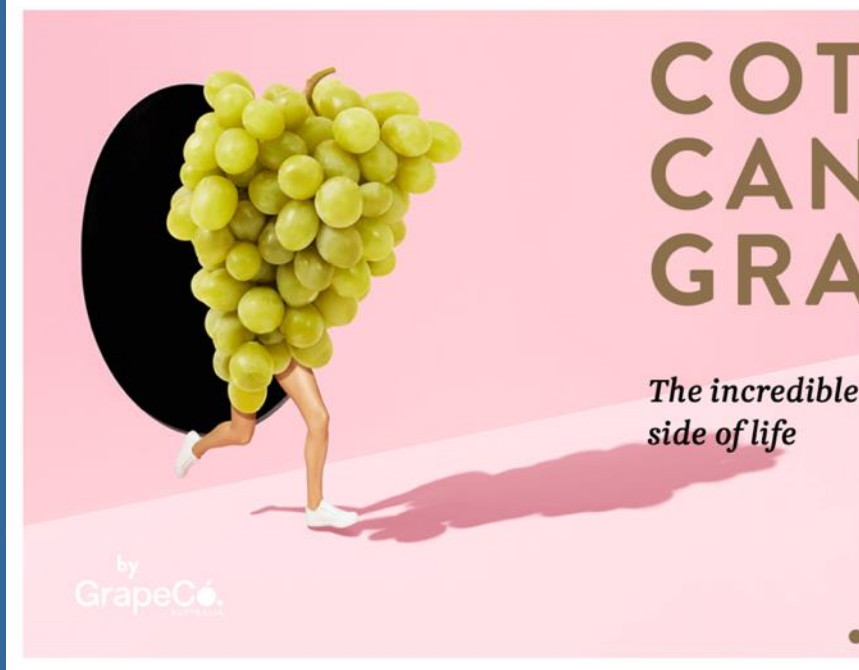
Jazz apples are part of an exclusive new partnership with the new DreamWorks Animation movie, Spirit Untamed.

The movie, which arrives in theaters June 4, 2021, is the next chapter in DreamWorks Animation's franchise that began with the 2002 Oscar-nominated movie Spirit: Stallion of the Cimarron and includes an Emmy-winning TV series.

Apples are core to the story narrative of Spirit Untamed, which will hopefully encourage children and families to eat more healthy produce. With retail partners nationwide this spring, Jazz apples will promote the movie with custom package artwork that depicts two of the movie's heroes: Lucky, a headstrong girl, and the wild stallion Spirit, whom she befriends. In the artwork, Lucky rides a galloping Spirit while holding an apple.







COTTON CANDY™ GRAPES

The incredible taste of Cotton Candy™ from the sweeter side of life

by GrapeCo AUSTRALIA



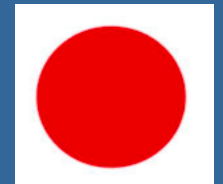
Marks & Spencer online:
 Cotton Candy \$10/kg
 Green seedless \$4.75/kg



Coca-Cola takes Minute Maid into fresh fruits with Frutura licencing deal

April 20th, 2023

The agreement also includes Coca-Cola's Simply brand and covers the US and Japan.



Both brands will be “exclusively deployed” by Frutura company Dayka & Hackett (D&H). Founded in 2005, D&H imports, sells and markets table grapes, citrus, stone fruit, mangos and avocados to US retailers.

Under the deal, Minute Maid and Simply will no longer be confined to the beverage category; the brands will be found in the produce aisle on fresh citrus and grape products. The Simply brand is entering the produce category as Simply Select with D&H citrus in the US. Minute Maid will be used on D&H grapes in the US and D&H fresh citrus and grapes in Japan.





Who Do Consumers Trust Most When Thinking About Their Food Across Europe?



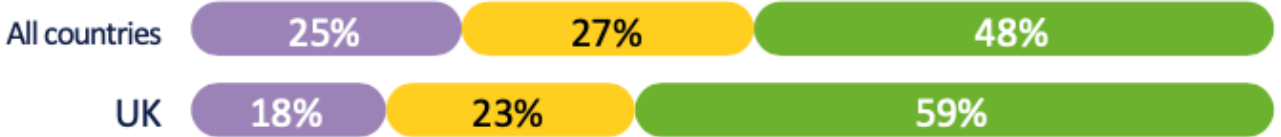
Trust in actors

● % expressing distrust ● % neutral ● % expressing trust

Trust in Farmers



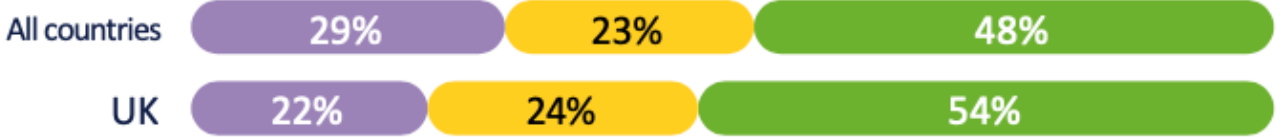
Trust in Manufacturers



Trust in Retailers



Trust in Authorities



UK and EU Consumers Trust Farmers More than Other Actors in the Food Industry.

Linking the Consumer to the Farmer is a Powerful Way of Building Trust in Your Product



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