

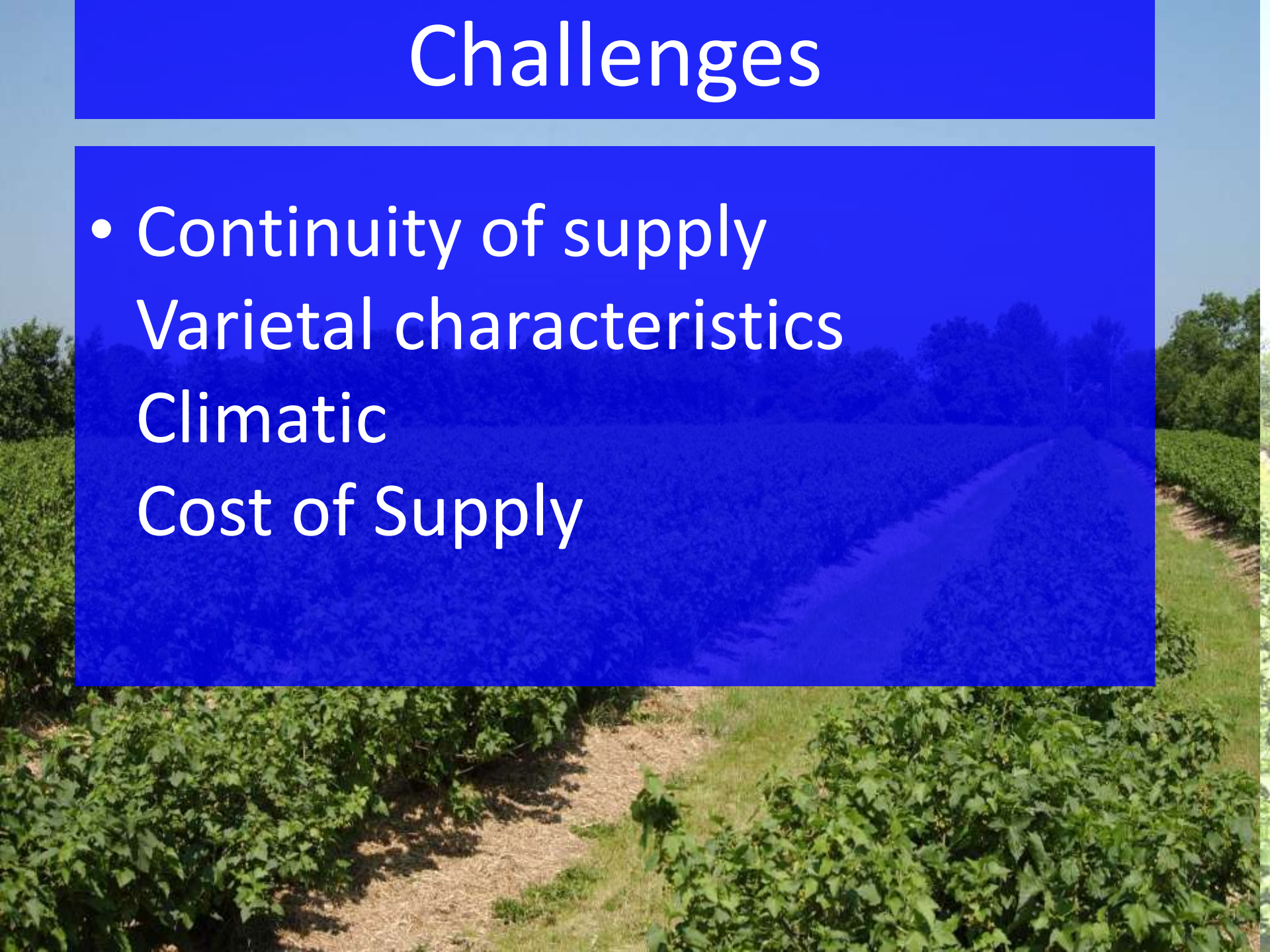
# Challenges To Fresh Blackcurrant Sales

Dundee May 2012  
Stephen Taylor

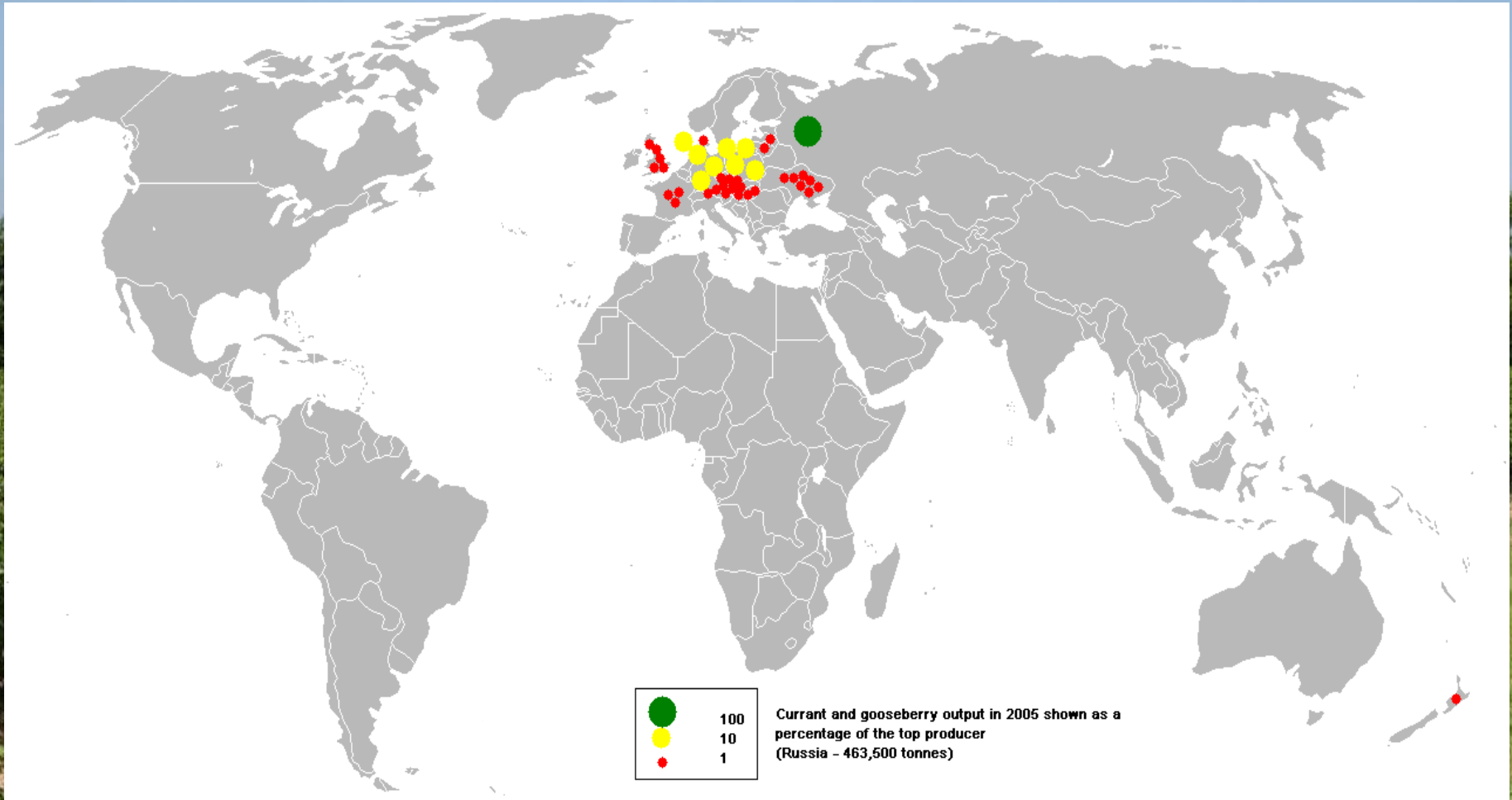


# Challenges

- Continuity of supply
- Varietal characteristics
- Climatic
- Cost of Supply



# World Currant Distribution



# UK Production Distribution



# Advantages



- Tradition
- Health characteristics
- Low current market penetration

# Tradition

- During WWII, most fruits rich in Vit. C such as oranges became almost impossible to obtain in the UK.
- Blackcurrant cultivation was encouraged by the British government as high in Vit C and grew well in the UK
- From 1942 on, almost the entire British blackcurrant crop was made into blackcurrant syrup/cordial and distributed to the nation's children free, giving rise to the lasting popularity of blackcurrant flavourings in Britain.
- Today 99+% is processed

# Fresh Variety Selection

- Varieties selected from best of processed varieties
- Until last two years, areas planted for “fresh” are the best selections from those bred for processing e.g. Ben Connan, Ben Lomond and Ben Tirran.
- In 2006 Winterwood Farms Ltd. started formal collaboration with SCRI to develop new varieties with fresh market characteristics.
- ‘Big Ben’ is first commercial fresh variety that has come from this.
- Fresh Target market is the UK multiples

# Fresh pick Traits











# Uneven Ripening



# Difficult To Pick



# Fresh pick Traits

- More berries per strig / cheaper to pick
- Green Strigs
- Berries not prone to shatter
- Edible!



	PROCESS	FRESH	FRESH
		Short Term	Long Term
High Brix:Acid & Low Total Acidity			
Berry Taste / Texture			
High Vit C			
High Anthocyanins			
Pest & Disease Resistance			
Growth Habit / Bush Shape			
Hand Picking Cost			
Yield			
Strig Count			
Strig Shatter			
Green Strigs			
Winter Chill <1800hrs			
Winter Chill <1000hrs			

# Promo Funding

- “The Seasonal Berries Campaign”
  - Promote fresh sales only and all soft fruits
  - 8 core members contribute 0.06% turnover
  - £230k (€290k) fund gives £8.2m(€10.2m) PR value (35X factor)
  - [www.SeasonalBerries.co.uk](http://www.SeasonalBerries.co.uk)
  - Monthly Newsletter
  - Social Networking Sites e.g. Facebook & Twitter
    - Use of surveys
    - Spreading health messages
- “The Blackcurrant Foundation”
  - Promote all sales but only Blackcurrants
  - [www.BlackcurrantFoundation.co.uk](http://www.BlackcurrantFoundation.co.uk)



# Seasonal Berries Campaign

## Waitrose: Website

## Asda: Online Magazine



**Waitrose Organic Strawberries 300g**  
**SAVE £1.00**

£ 2.49  
(£11.04 per kg)  
was £3.49



## Tesco: Website



# Seasonal Berries Campaign

## Sainsbury's: Website

### Pancake Day recipes

Tasty recipes and handy tips for making the perfect pancakes.

Find out more



## Ocado: Online Magazine and Website

Flip them, stack them, savour them

ORDER EVERYTHING FROM MIXING BOWLS TO YOUR FAVOURITE TOPPINGS

Shop now



### The Ocado range - lovingly delivered

GOOD QUALITY, SENSIBLY PRICED AND, OF COURSE, RESPONSIBLY SOURCED



Shop now

## Co-op: Website



£2 was £4  
The Co-operative blueberries  
225g (£8.88 per kg)  
(Available until 14th February 2012)

Add item to shopping list



£2 was £4  
The Co-operative strawberries  
200g (£8.88 per kg)  
(Available until 14th February 2012)

### pancake deals

Get Big Deals and Special Offers on the Co-operative and Sainsbury's. The below is a selection of our deals. You will find more deals available in store. Subject to availability. See each product for offer and date.

<p><b>BUY ONE GET ONE FREE</b></p> <p>£2.99 was £4.98 McNaggs Special W Sauce 8 packs (25.99 per kg) (Available until 14th February 2012)</p> <p>Add item to shopping list</p>	<p><b>HALF PRICE</b></p> <p>£2 was £4 The Co-operative blueberries 225g (£8.88 per kg) (Available until 14th February 2012)</p> <p>Add item to shopping list</p>
<p><b>HALF PRICE</b></p> <p>£1.35 was £2.70 The Co-operative mandarin 700g (£1.93 per kg) (Available until 14th February 2012)</p> <p>Add item to shopping list</p>	<p><b>HALF PRICE</b></p> <p>£2 was £4 The Co-operative strawberries 200g (£8.88 per kg) (Available until 14th February 2012)</p> <p>Add item to shopping list</p>



Great Value Fruit and Veg

Shop all round pound deals here

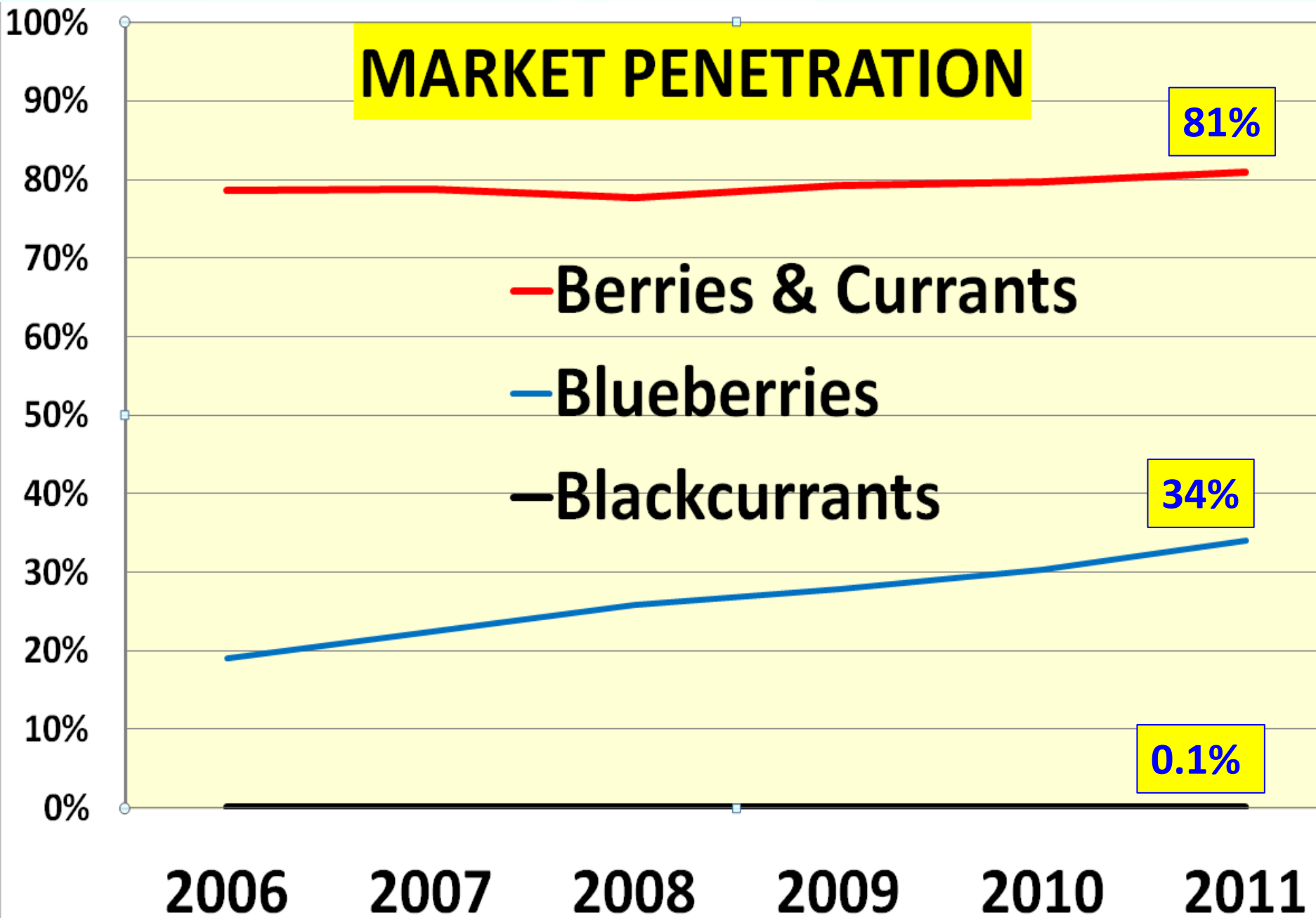
Only £2



# UK – Market Research

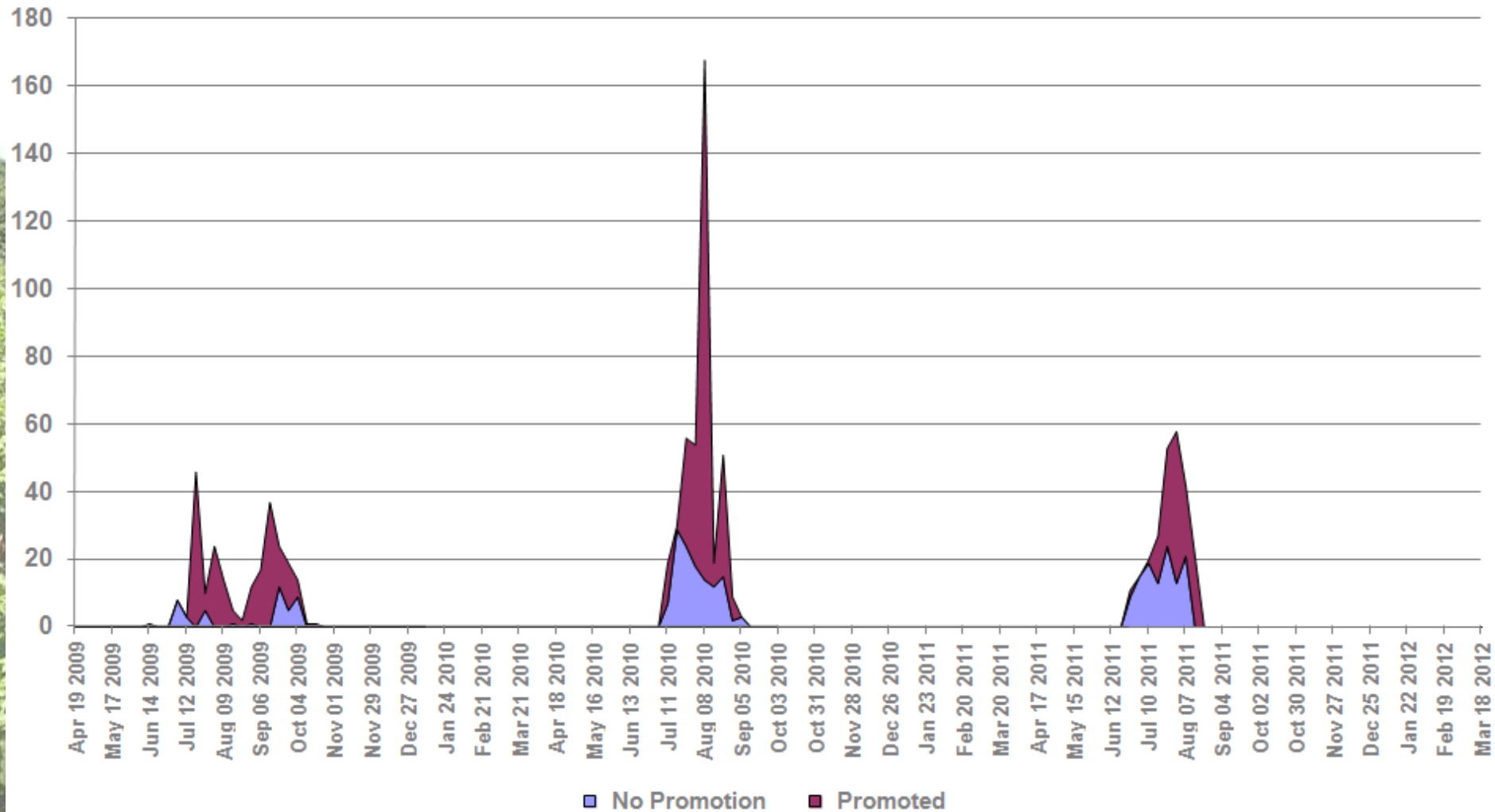
- Excellent data available
  - “Kantar World Panel” = 25,000 consumers enter data
  - “Nielsen” EPOS data from cross section of retailers.
- Highly Targeted promotions possible
- Fruit Market = £4.1 bn (€5.1bn) +2%
- Berry Market = £783m (€1.0 bn) +14%
- Blueberry market = £160m (€200m) +13%
- Total Blueberries sold ~ 24,000 tonnes
- Total Blackcurrants sold < 150 tonnes !

# MARKET PENETRATION



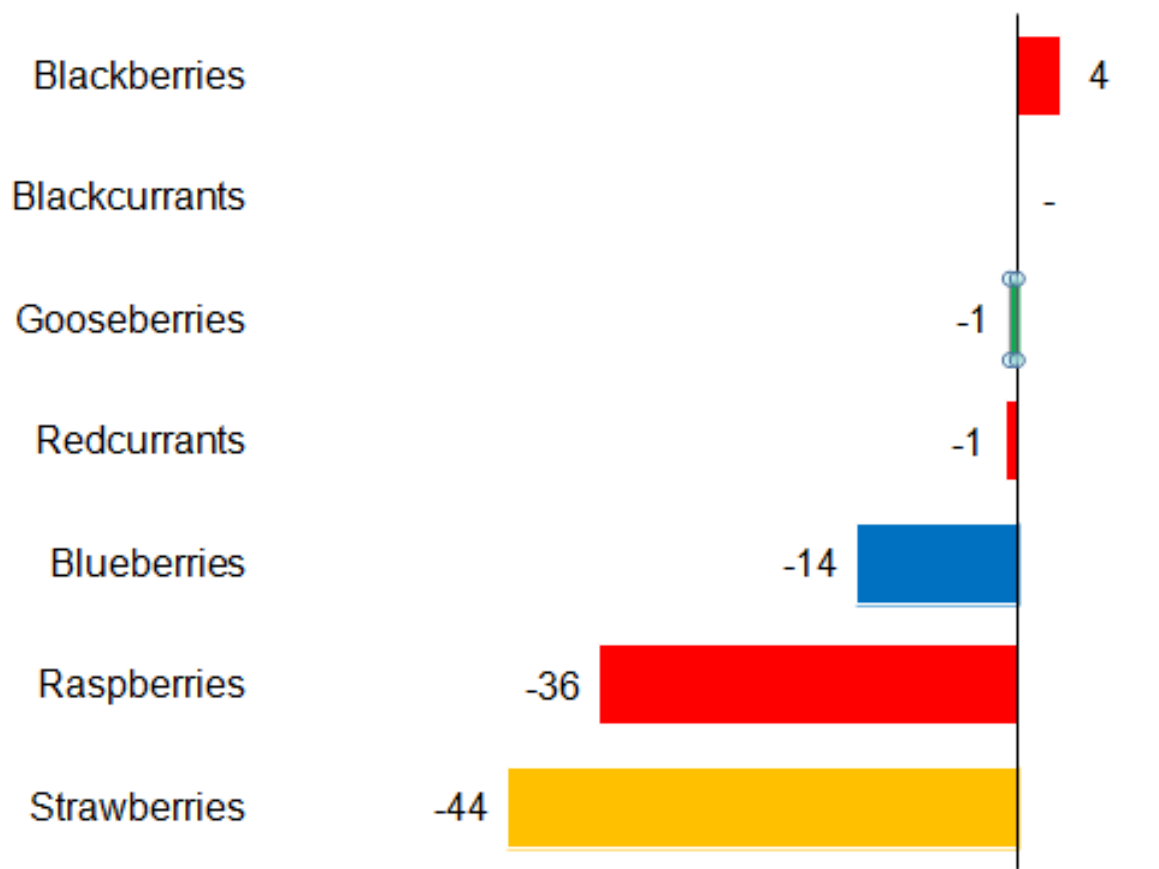
# Continuity Of Supply

Blackcurrants Weekly Sales £000s



# UK – Blackcurrant Market Research







## Berries & Currants - Net Switching Volumes - Blackcurrants



Switching - £000s

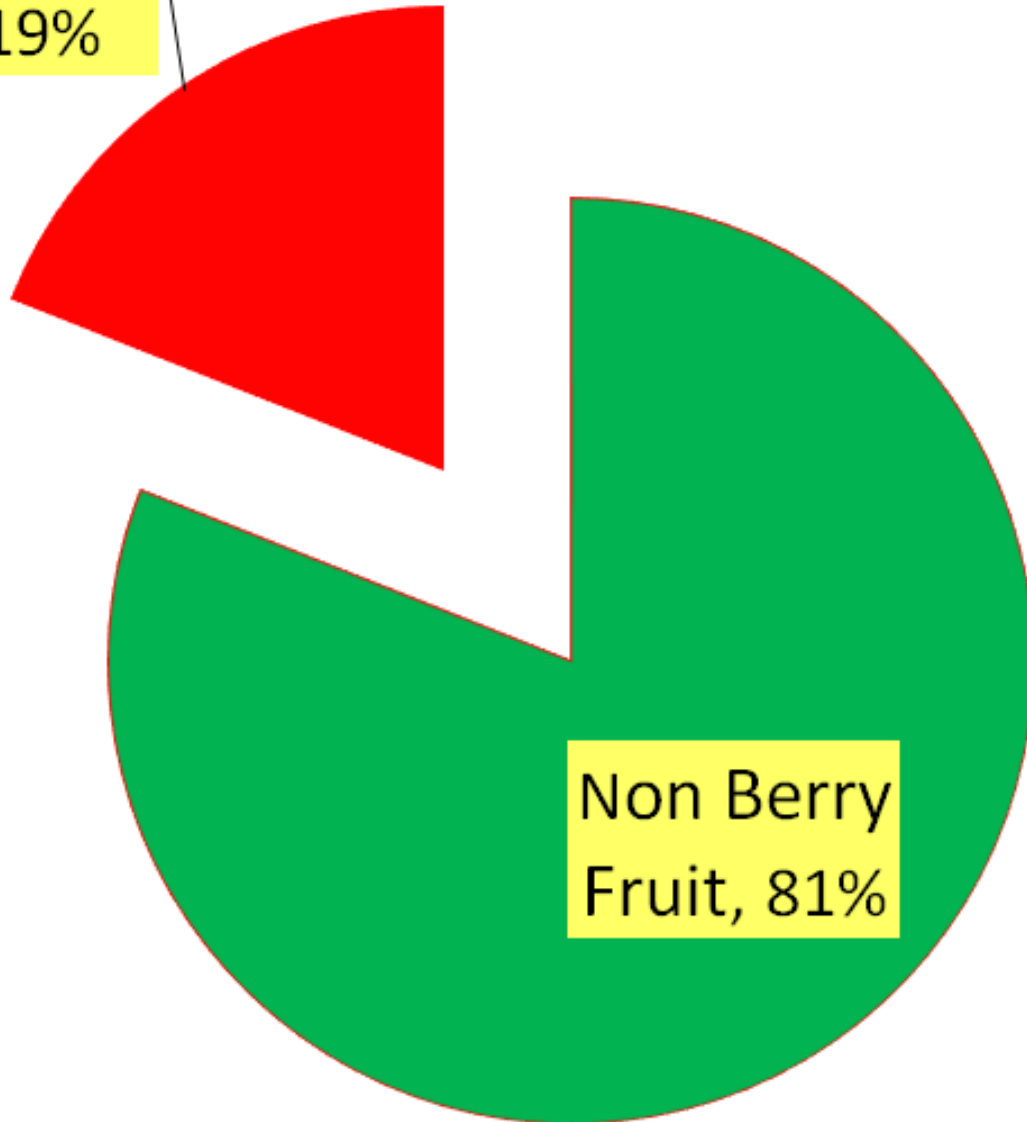
52 w/e Mar 20 2011 vs. 52 w/e Mar 18 2012

# UK Fruit Market Research

Fruit	52 W/E 19/2/12		
	Value Growth YoY (%)	Volume Growth YoY (%)	YoY % Change in Retail Kg Price
Total Fruit	 Confidential		
Berries			
Strawberry			
Raspberry			
Blueberry			
Blackberry			

# Total Value Fruit

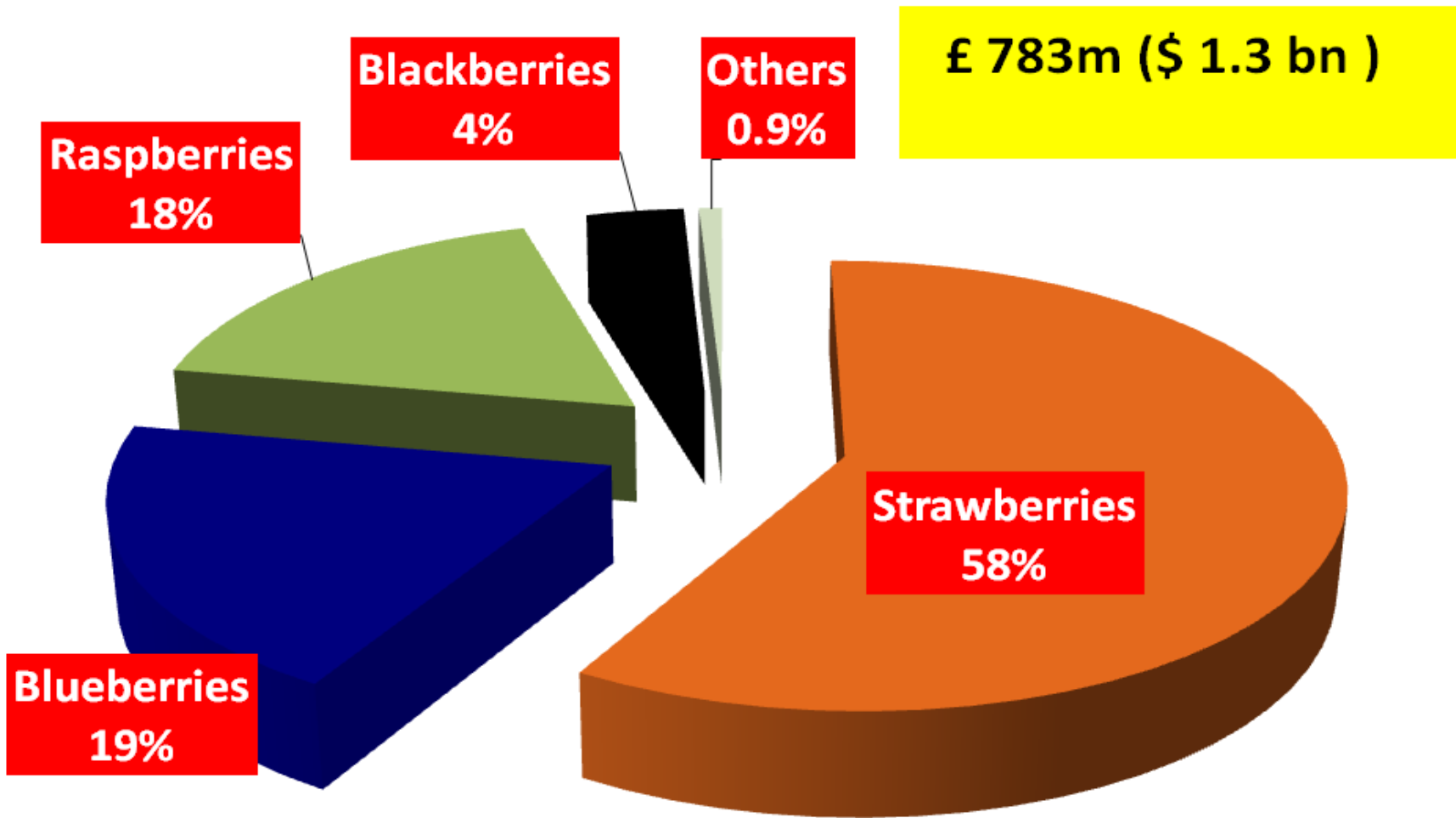
Berries,  
19%



Non Berry  
Fruit, 81%



# UK Berry Sales



# Summary – The Future Of Fresh

- Nothing will change until varieties move to next level.
- Massive Penetration potential with right varieties
- Research potential
  - Will be beneficial BUT likely show similar results to Blues
  - More money on Blueberry research will inevitably lead to a higher proportion of PR opportunities for Blueberries.
- Blackcurrants will remain a juice driven product until more edible and commercially attractive varieties are bred.

The Competition .....



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**Thank you!**

