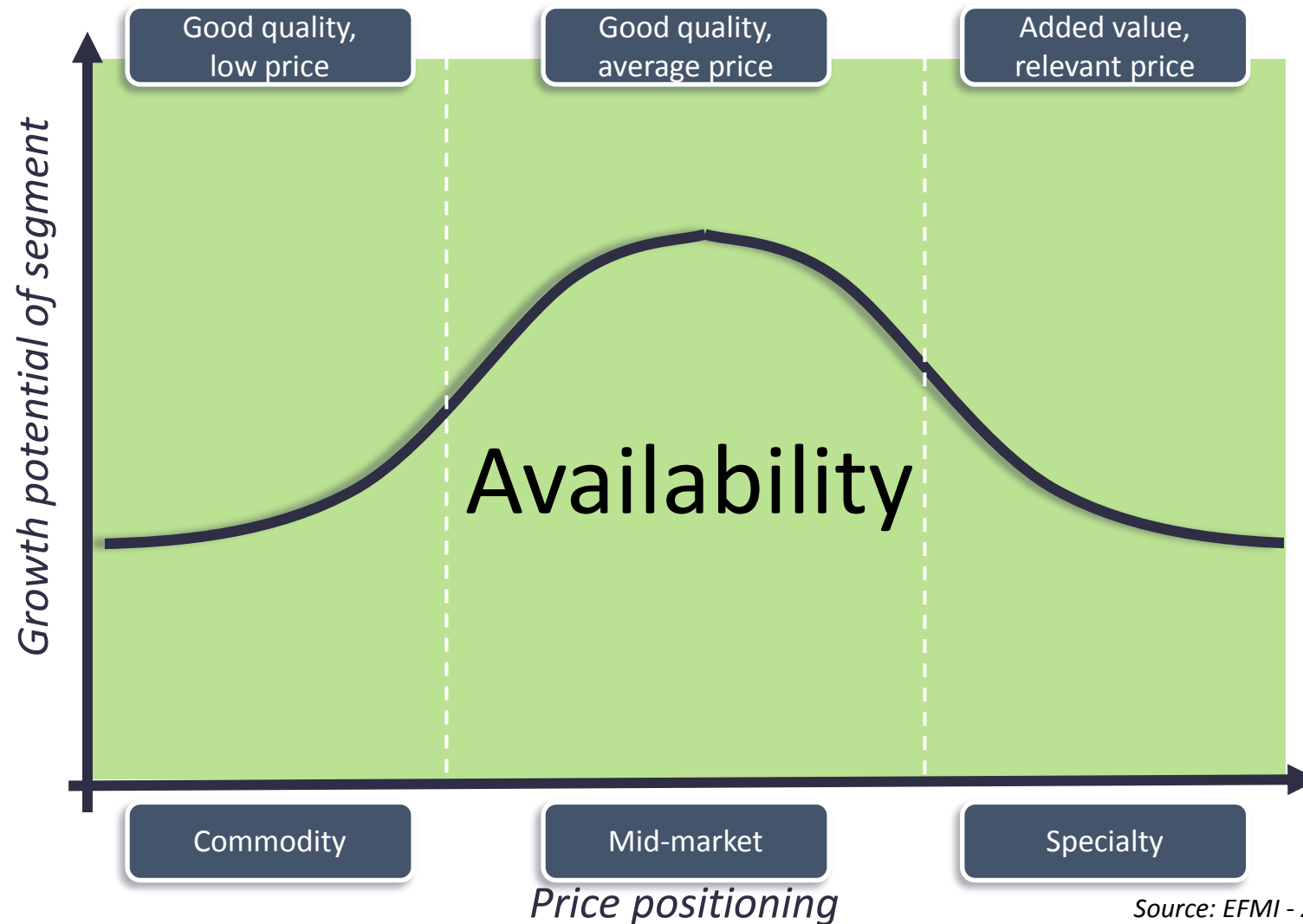




Trends and developments in the fresh supply chain; chain management as a service from a vegetable seed breeding company.

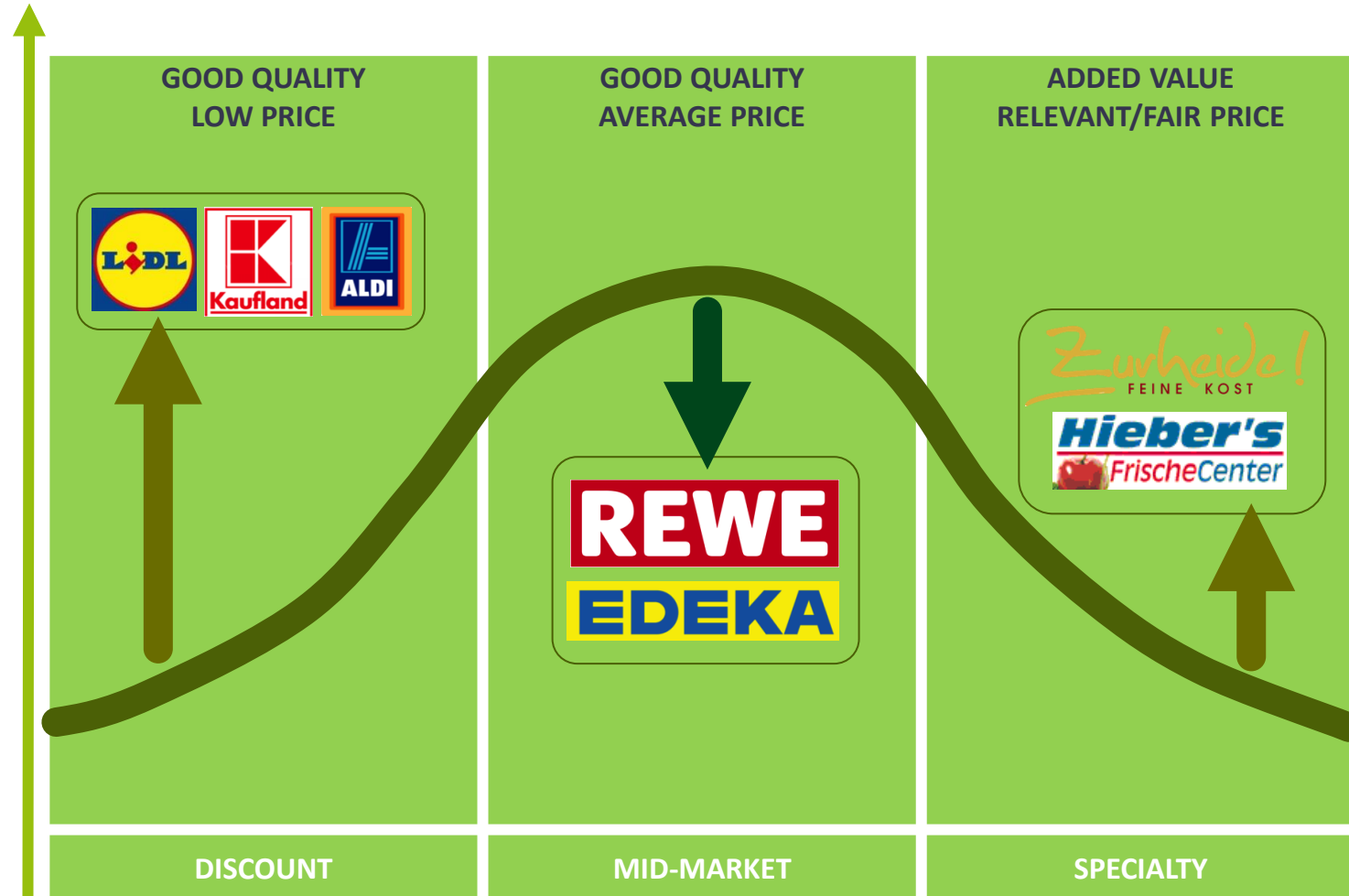
**ABRAS Essencial**      **Jan Doldersum & Thijs Hulisz**  
**March 19<sup>th</sup> 2018**

# Young markets



# Overtime the growth potential is changing

Growth potential



# Overtime the growth potential is changing



# Key trends & developments

Retail & Consumer

# Trend: Global Demand for All Things Local



# Retailers Respond



## Retailers Respond



# Retailers Respond



**REWE.DE/REGIONAL**

**REWE Regional**

„Gezählt habe ich sie noch nicht. Aber im Blick habe ich sie alle.“

AUS DEINER REGION 

**REWE DEIN MARKT**

**Kevin van Ijperen**  
Gemüsebauer aus der Lutherstadt Wittenberg in Sachsen-Anhalt

Locally grown

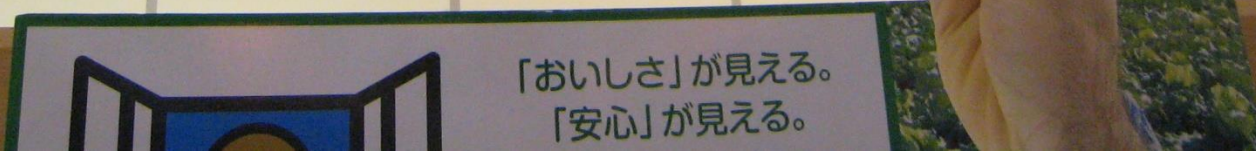




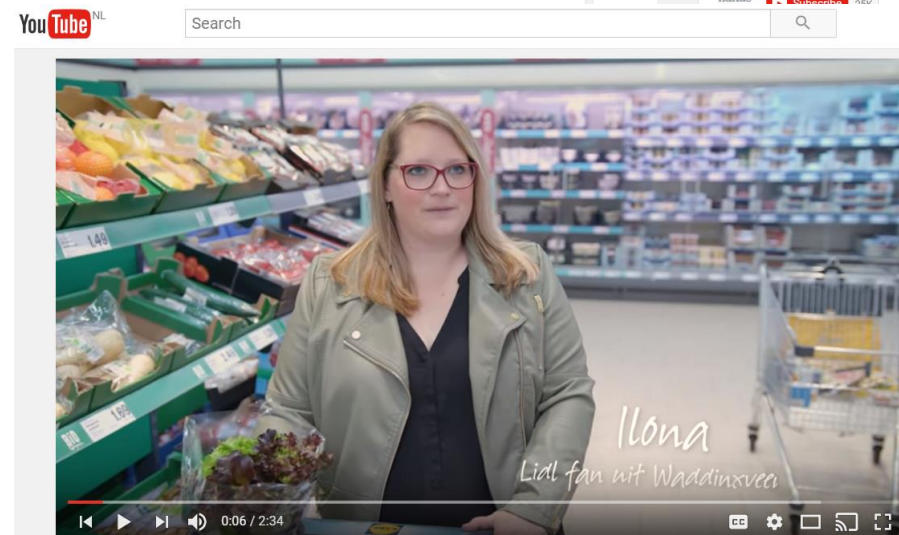


# We want to know who made it



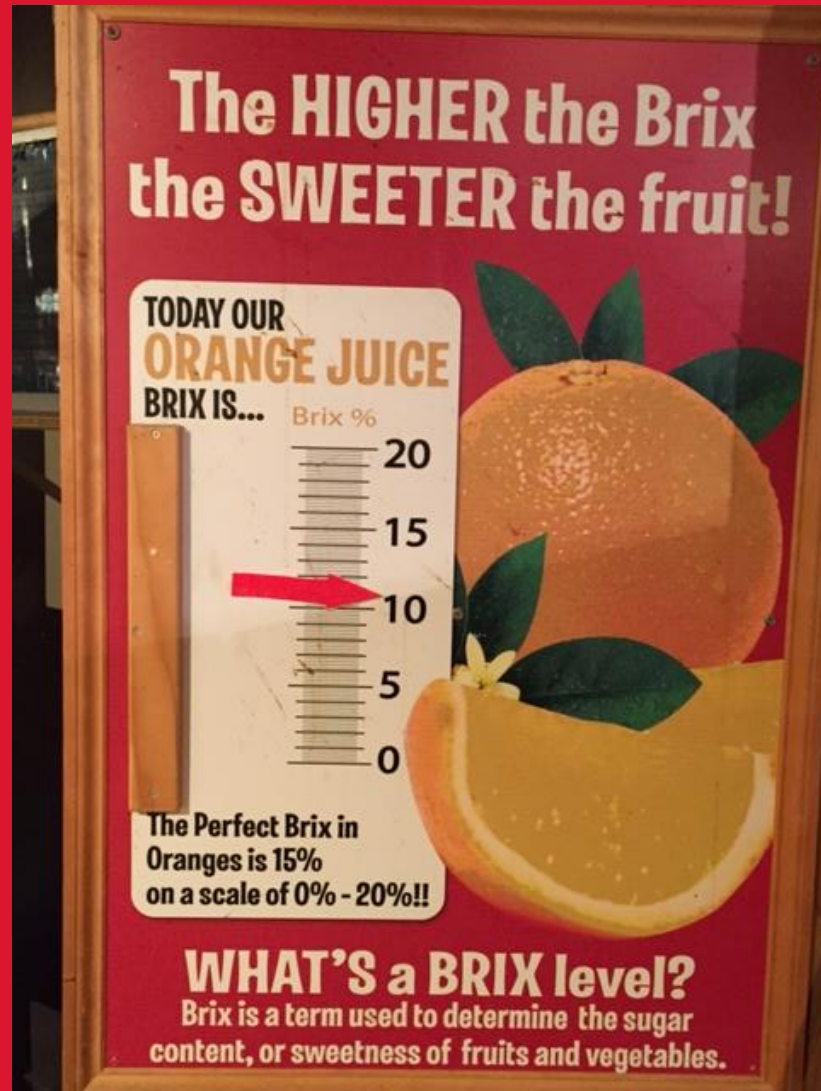


# We want to know who made it: Story telling



# Make taste tangible





FRESHLY PICKED HERBS			
<b>BASIL</b> TASTE: PEPPERY, SOMEWHAT MINTY FLAVOR. REMINISCENT OF LICORICE. USE: IN MEDITERRANEAN, THAI DISHES, AND IS ALSO TASTY WHEN PREPARING BEEF, POULTRY, LAMB, VEAL AND FISH OR AS A GARNISH.	<b>ROSEMARY</b> TASTE: STRONG, SHARP AROMA. REMINISCENT OF LEMON & PINE. USE: EXCELLENT SEASONING FOR ANY POULTRY, MEAT OR VEGETABLE DISH.	<b>MINT</b> MINT COMPLIMENTS ALL KINDS OF MEATS, FISH AND VEGETABLE DISHES. EXCELLENT COMBINED WITH JUST ABOUT ANY VEGETABLE, SOUP, SAUCE, CANDY AND CHOCOLATE.	
<b>PARSLEY</b> TASTE: SLIGHTLY PEPPERY, TANGY FRESH. USE: IT CAN BE ADDED TO OMELETS, SALADS OR AS A GARNISH.	<b>THYME</b> TASTE: STRONG, SLIGHTLY LEMONY. USE: WITH JUST ABOUT ANY POULTRY, CASSEROLE, STEW, SOUP OR VEGETABLES.	<b>CILANTRO</b> TASTE: TANGY SHARP FRESH FLAVOR. USE: ENHANCES POULTRY AND MEATS, OR MEXICAN RECIPES, SALADS AND SOUPS.	
<b>OREGANO</b> TASTE: PUNGENT AND PEPPERY FLAVOR. MAKE THIS A CLASSIC PIZZA HERB. USE: ADDS ZEST TO MANY ITALIAN, GREEK AND MEXICAN CUISINES. COMPLEMENTS TOMATO DISHES, BEEF & LAMB STEWS, SOUPS, SALADS OR CASSEROLES.	<b>SAGE</b> TASTE: A PUNGENT, SLIGHTLY BITTER, MUSTY MINT FLAVOR. USE: MAKES A GREAT RUB FOR MANY MEAT AND POULTRY DISHES. PROBABLY BEST KNOWN AS A DELICIOUS ADDITION TO POULTRY STUFFING.	<b>TARRAGON</b> TASTE: A DISTINCTIVE ANISE LIKE FLAVOR WITH UNDERTONES OF SAGE. USE: IT ENHANCES ANY MEAT AND MOST MAINSTREAM VEGETABLES. TARRAGON IS ESSENTIAL TO HOLLANDAISE & BEARNAISE SAUCE.	
	<b>CHIVES</b> TASTE: HAS A MILD ONIONLIKE FLAVOR. USE: IN HERBAL VINEGARS, BUTTERS AND CHEESES. ALSO TO FLAVOR SALADS AND SOUPS.	<b>DILL</b> TASTE: PARSLEYLIKE FLAVOR WITH UNDERTONES OF ANISE. USE: ESSENTIAL FOR PICKLING. SUPPLEMENTS FISH SOUPS, STEWS, POTATOES & SAUCES.	

# Consumer is more aware and concerned of waste

- Be truly sustainable in your offer  
(*Inglorious vegetables*)



# Recipe boxes and meal kits are allowing retailers to cater to “for tonight” shoppers



© Ahold Delhaize

Ahold Delhaize US banner Giant offers Fresh Meal Kits. Each features pre-measured fresh ingredients for two servings of the selected meal as well as step-by-step instructions.



Tesco launched its own recipe boxes – priced at GBP8 for a meal for two – in late 2016.



© Waitrose

Described as “ultra convenience”, Waitrose’s Dinner for Tonight bags were launched late 2016. Meals are priced from GBP8-12 and serve two people.

# Snacking is important category growth driver



## Introduction Tommies the basis for...

Attention to new concept:

- Display XL incl. top card
- Cashback action

### Result

- More attention to the products
- High sales results

Concept launched in cooperation with the retailer





Pick Your Own

**As produce freshness and waste reduction continue to be top of mind for consumers, retailers are offering new types of DIY experiences to allow shoppers to have an active role in their grocery selections.**

Strategies include adding instore gardens to allow shoppers to pick their own vegetables and offering a wider variety of bulk shopping at affordable prices, all aiming to cater to shoppers' evolving needs.

#### PLANET RETAIL'S VIEW

As mainstream grocers continue to adopt food-progressive practices around fresh, finding new ways to bridge the gap between the product source and the consumer will prove key in determining the next generation of food progressives

#### Best-in-Class Retailers



# Retail disruption: Discount

- The discount sector has experienced phenomenal growth globally
- Gaining greater consumer acceptance as it broadens appeal through improved formats, more convenient locations, stronger marketing and larger product assortment.
- Brands are increasing their presence in grocery discount as Aldi and Lidl introduce more national and international brands into the mix.

## Discount stores are becoming...



Larger to host an expanded assortment



More quality-led



More convenience-driven, both in terms of assortment and location

# Trend: Discounters add Fresh-cut Salads to their assortment



# Trend: Discounters add Premium Salate to their assortment



# New product launches in the convenience produce section.

Sainsbury's makes a coherent effort to make everyday food more exciting, bringing new colours, textures and flavours to shoppers' plates.



“ **TESCO**  
customers have told  
hey'd like help in  
osing healthy options.

H-E-B ready-made salads are designed for on-the-go consumption in the US. The products are sold in the produce department and provide trendy ingredients like kale or quinoa.

Taking inspiration from foodie blogs, **Tesco** and **Aldi** now offer vegetable spaghetti options under their private label brands

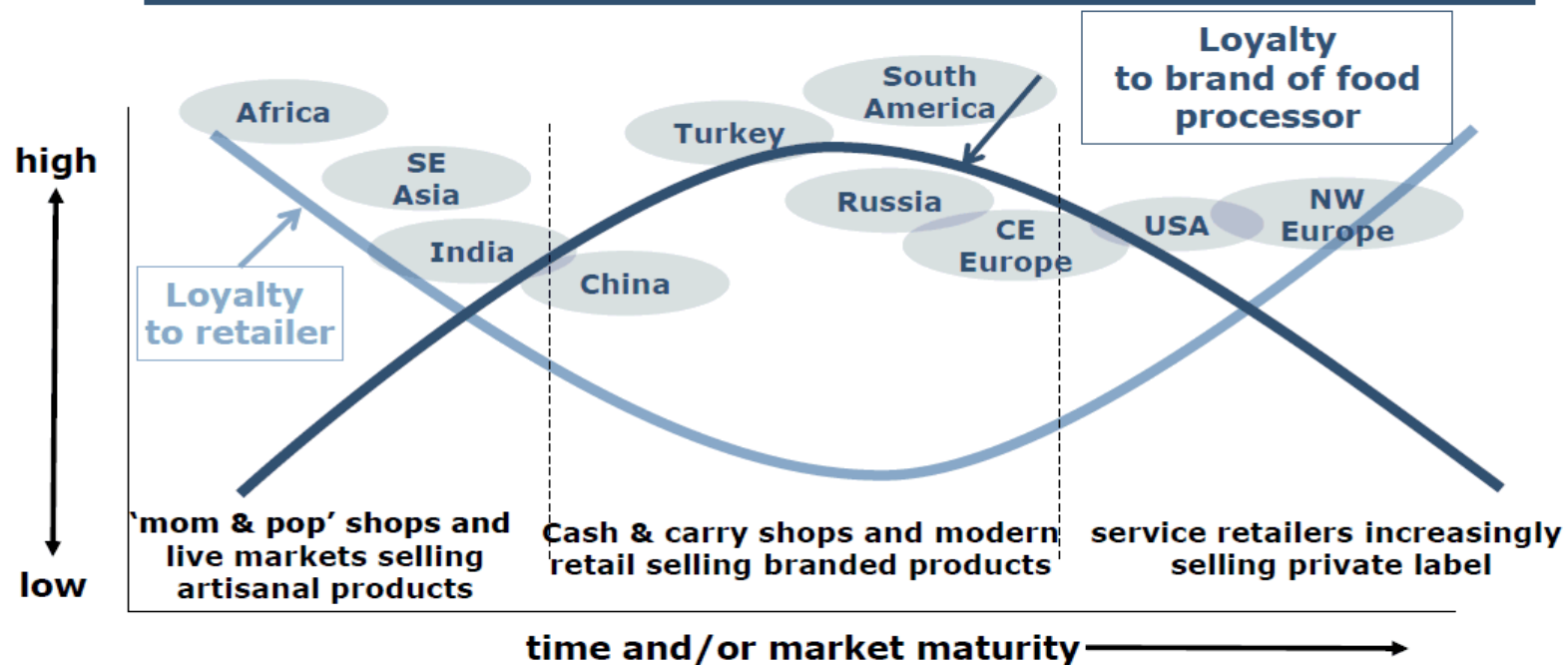


# Global evolution of retail towards brands

## Global evolution of modern food retail

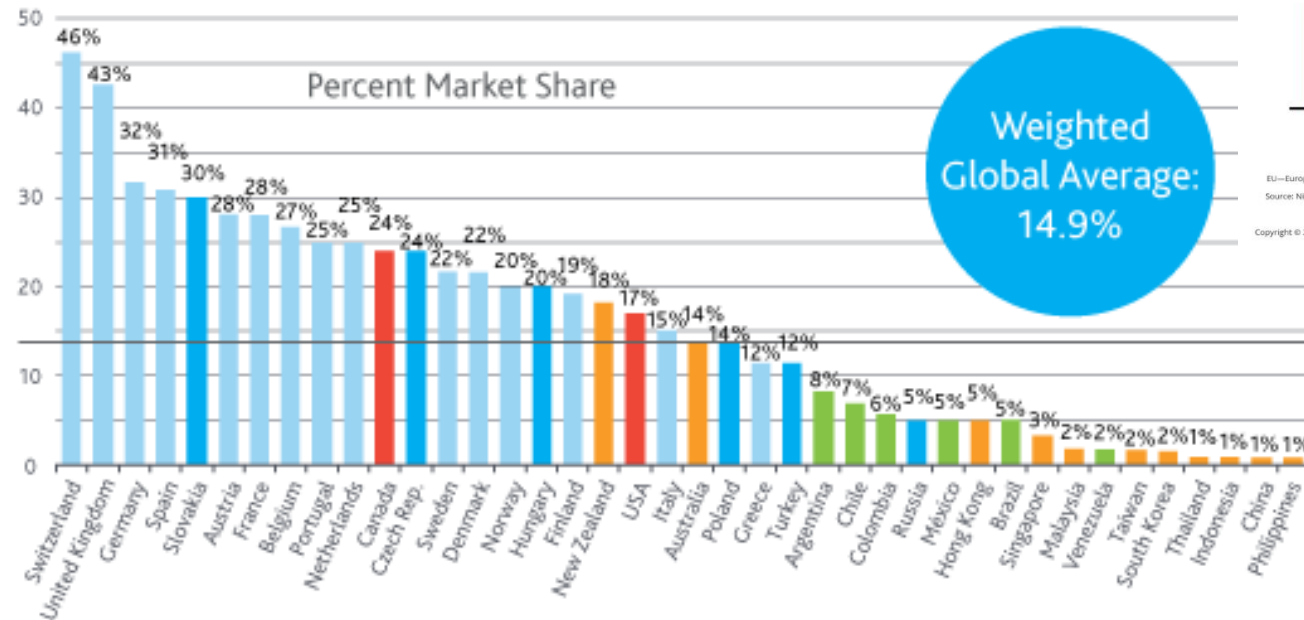
*Modern retail and brands lack goal congruence in developing countries*

### Loyalty curves

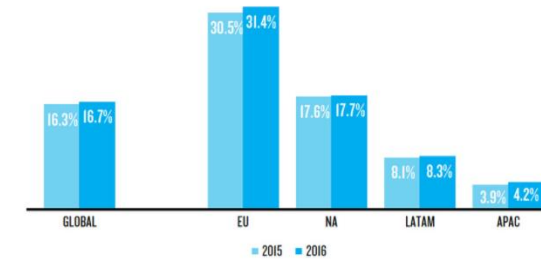


# Private label growth

The private label reality is significant and mostly growing, but not everywhere



GLOBAL PRIVATE-LABEL VALUE SHARE GROWTH  
2015 - 2016



EU—Europe; NA—North America; LATAM—Latin America; APAC—Asia-Pac IfC  
Source: Nielsen Retail Measurement Services

Copyright © 2017 The Nielsen Company

Source: The Nielsen Company, 2009 for most countries (some of the smaller markets is 2008 data)

Note: For a consistent cross-country view, all categories are weighted equally to produce an average private label share. Individual country reporting may vary due reporting differences.

# Retailers should be rethinking value lines to fend off discounters

- Homebrand, one of Australia's largest private label brands, was axed by Woolworths in 2016. In the face of growing competition from Aldi, the retailer is now focusing on its more aesthetically pleasing Essentials range.

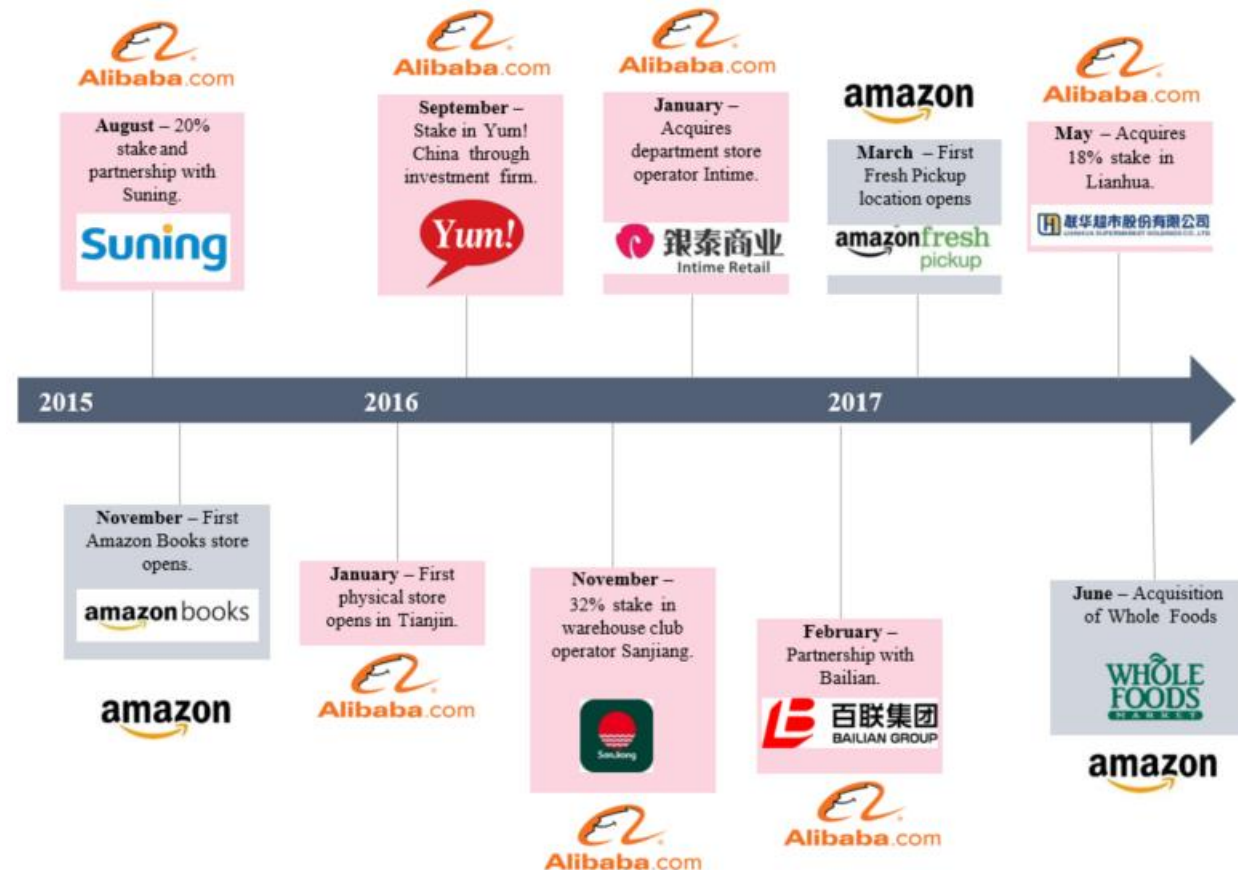


- In 2016, **Tesco** launched eight new farm brands for fresh categories to meet customers' needs for "a new level of quality" at low prices. In other words, to combat the discounters. Everyday Value is being removed where duplication occurs.



# Online developments

Amazon and Alibaba have made a series of major investments in physical retail over the past two years



# Disruptors



## Amazon to buy Whole Foods Market in \$13.7bn deal

Takeover of organic food specialist marks new push into grocery market after launch of Fresh delivery service



Amazon is to acquire Whole Foods Market for about \$13.7bn. Photograph: Spencer Platt/Getty Images

Amazon, the world's most powerful online retailer, has taken a giant stride into the grocery market, announcing \$13.7bn (£10.2bn) to take over organic food chain

Amazon was already in talks with one fifth of grocery suppliers, "suggesting a launch in grocery may be earlier than we thought"

survey, presented to the Australian Food and Wine on Wednesday, the investment bank revealed

# Implications – Long run



- Pressure on industry to build scale, invest in tech, cut costs and differentiate.
- Bezos: relentless on 2 strategic elements
  - Speed
  - Low(est) price—long history of selling at a loss to inflict pain on competitors (books, media, diapers...)
- Amazon is in the commoditization game
- “your margin in my opportunity”



# Intermezzo



# PILARES



RASTREAMENTO  
COLABORATIVO



MONITORAMENTO  
DE AGROTOXICOS



COBERTURA  
COLETIVA



POLÍTICA DE  
CORREÇÃO

# METODOLOGIA



CADERNO DE CAMPO



RASTREABILIDADE



MONITORAMENTO



GESTÃO DO  
VAREJO



CONSULTA DA ORIGEM  
E TRAJETÓRIA DO ALIMENTO

ADESÃO  
47

VAREJOS  
PARTICIPANTES





# Family company

- Since 1924
- Independent
- About 2,500 colleagues  
in more than 30 countries

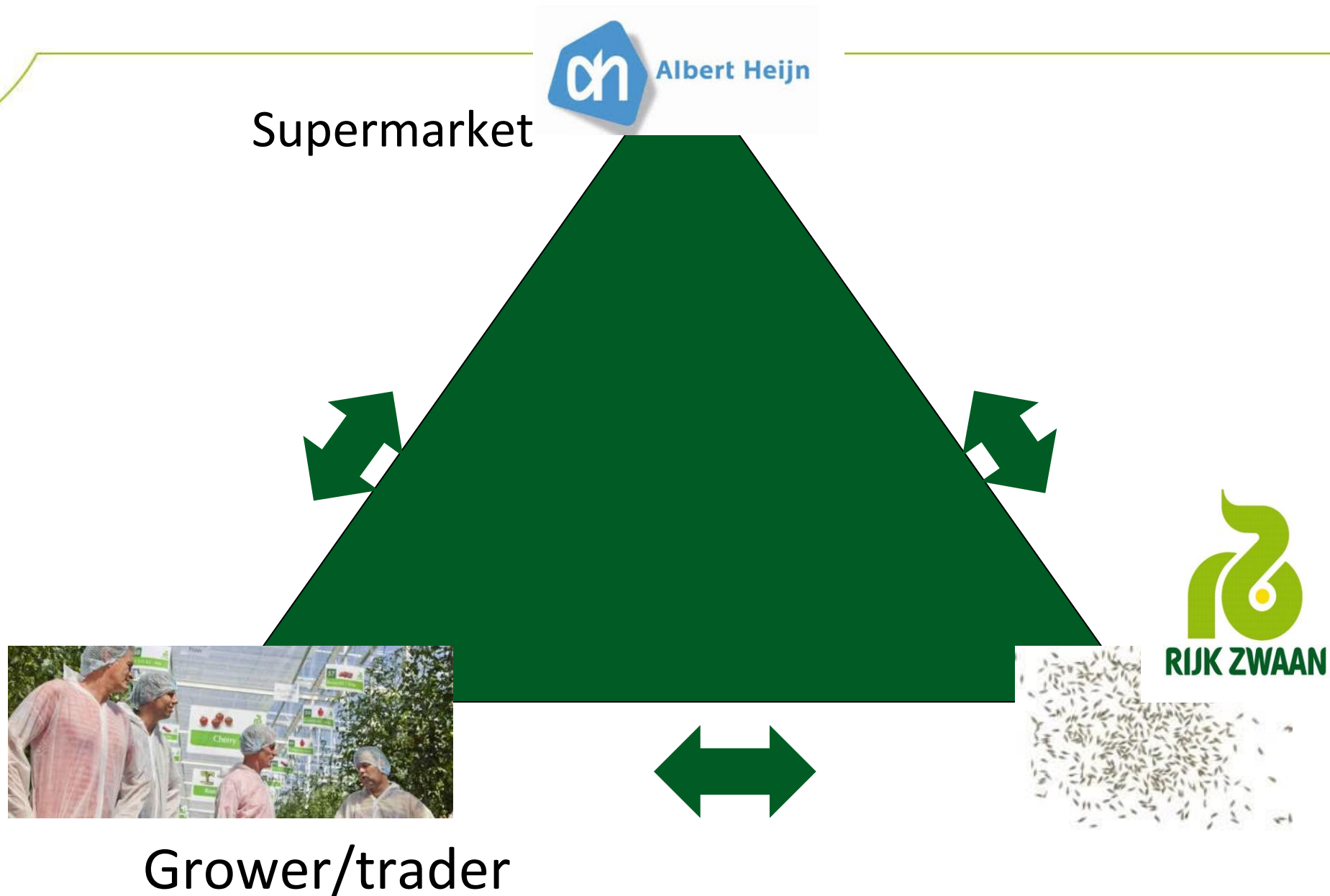


# Developing new varieties

- Demands from the market
- Natural diversity
- High tech research
- Worldwide breeding locations



# Our business model





We already have received 8 Brazilian retailers in  
the Retail Centre in Berlin.



## Shopping

gaining behavioral insights with innovative technology.

“What is the ideal shelf lay out?” What do your customers find of your shelf?

- “Is the product easy to find for the consumer?”

**Retail  
Center**

# Retail

## 3 RZ service concepts

1. Developing new and better concept & products
2. Finding sourcing solutions & improving quality
3. Creating category growth



# Example of Marketing concept

**abras**  
Essencial



**La Lechuga Snack**  
es la primera lechuga especialmente  
apta para su uso deshojada como  
base o soporte de distintos  
preparados (guacamole,  
cremas, salsas...)

**¡AÚN NO HAS VISTO  
EL VÍDEO DE SNACK?**

**La base más  
crujiente  
para tus snacks**

**Lechuga Snack**  
Actualmente existen dos variedades  
dentro de esta categoría: Tendita R2  
y Chicarra R2, siendo la primera  
línea por la disponibilidad del  
producto durante todo el año.

**Beneficios para  
el consumidor**

- La primera lechuga base para Snack.
- Resiste toppings calientes.
- Facil preparación/deshojado.
- Excelente sabor y textura crujiente.
- Apta también para su consumo tradicional  
como cogolito o en ensaladas.

**Beneficios para  
el distribuidor**

- Disponibilidad todo el año.
- Buena vida comercial.
- Nuevos colores próximamente.
- Ofrece un nuevo valor a tu  
consumidor (sus snacks).

**Beneficios para  
el restaurador**

- Hojas frescas y muy atractivas.
- Excelente sabor crujiente.
- Muy fácil de preparar como snack.
- Muy poco desperdicio.
- Responde a la tendencia de productos  
bajos en calorías.



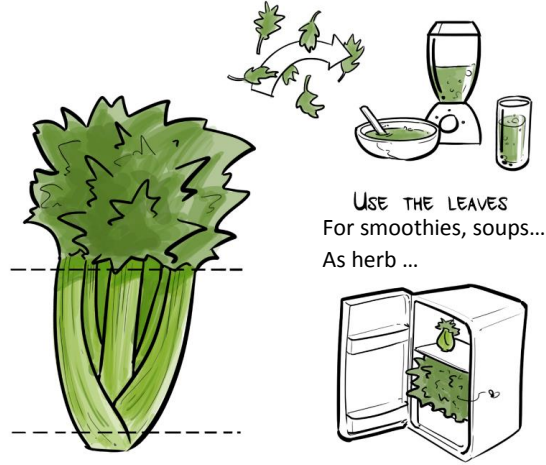
**¿AÚN NO HAS VISTO  
EL VÍDEO DE SNACK?**



## 2 cuts & it's ready to eat

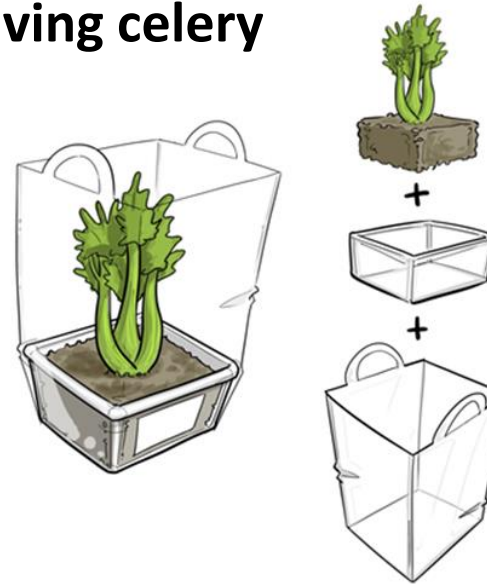


BETTER TASTE, LESS STRINGY



TAKES UP LESS SPACE

## Living celery



## Kitchen garden



## Packaging

Inspire consumers on product usage & highlight how unique the product is!



**Leaves:** Source of Folate (Vitamin B11) & Vitamin C  
Perfect for your morning smoothie!



**Sticks:** High in Vitamin K, C & A. Source of Potassium  
The ideal evening snack!



## Snacking



# Example: Finding sourcing solutions

- Levarht Caribbean melon for Dubai



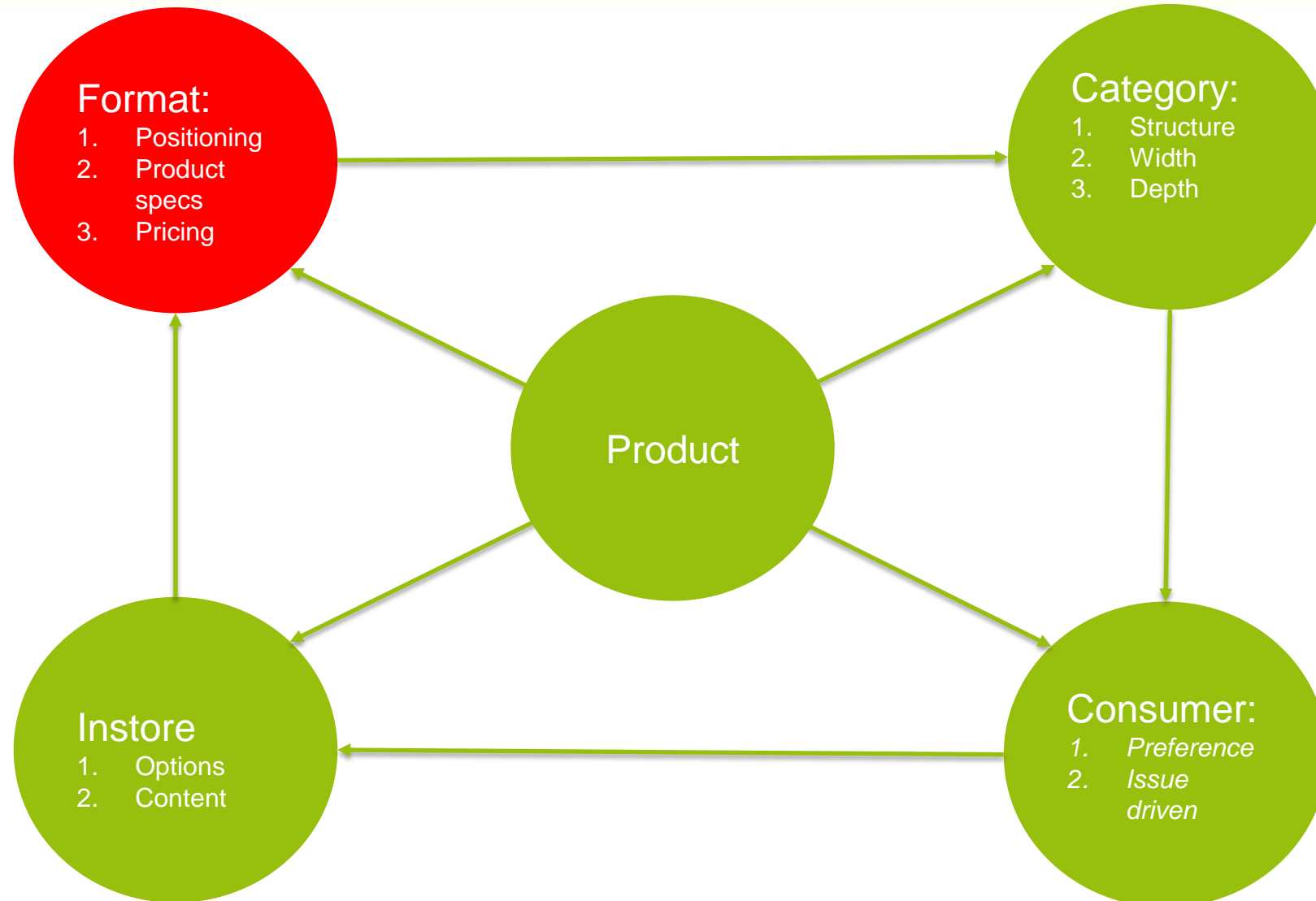
Rijk Zwaan introduces Caribbean melons in Turkey

<http://www.freshplaza.com/article/184982/With-Caribbean,-we-want-to-offer-retailers-the-same-quality-and-flavour-year-round>

# Creating category growth

Example Woolworths,  
South-Africa

# Rijk Zwaan Category Growth approach







Our *vision* is to be the  
DESTINATION OF CHOICE

in our customer's world of food through having

the MIND of a SUPERMARKET

& the soul OF A *deli*

**W WOOLWORTHS**



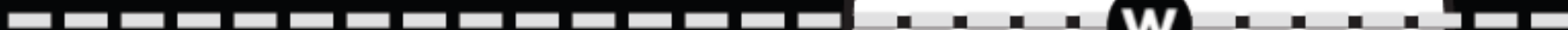
# LEADERS



Entrench our selves



WE get better and better



Change customer  
perception



Must complement and  
enhance, NOT ERODE.



# DESTINATION SHOP

## ATTACK

ON OUR STRENGTHS



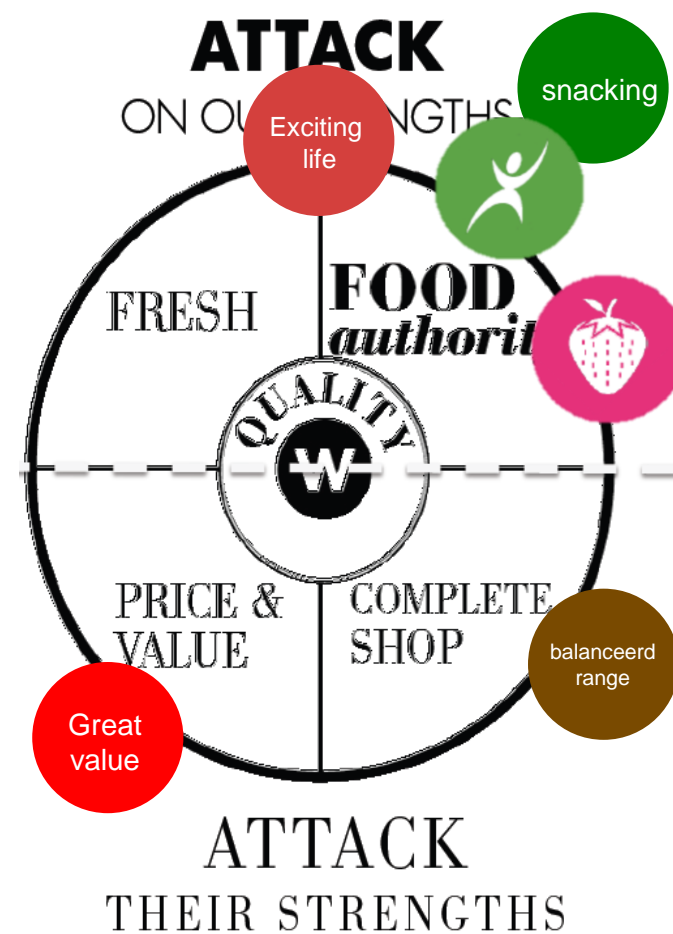
ATTACK  
THEIR STRENGTHS

# Growth drivers

- Exciting life
- Fabulous Flavours
- Health & Wellness
- Balanced range
- Great Value



= voorwaarde



# Results after project



# Results after project



# Results after project



# Results after project

- Woolworths lettuce project South Africa



Ralph/  
Rafael



Olite & Baesa



Auvona



Seurat

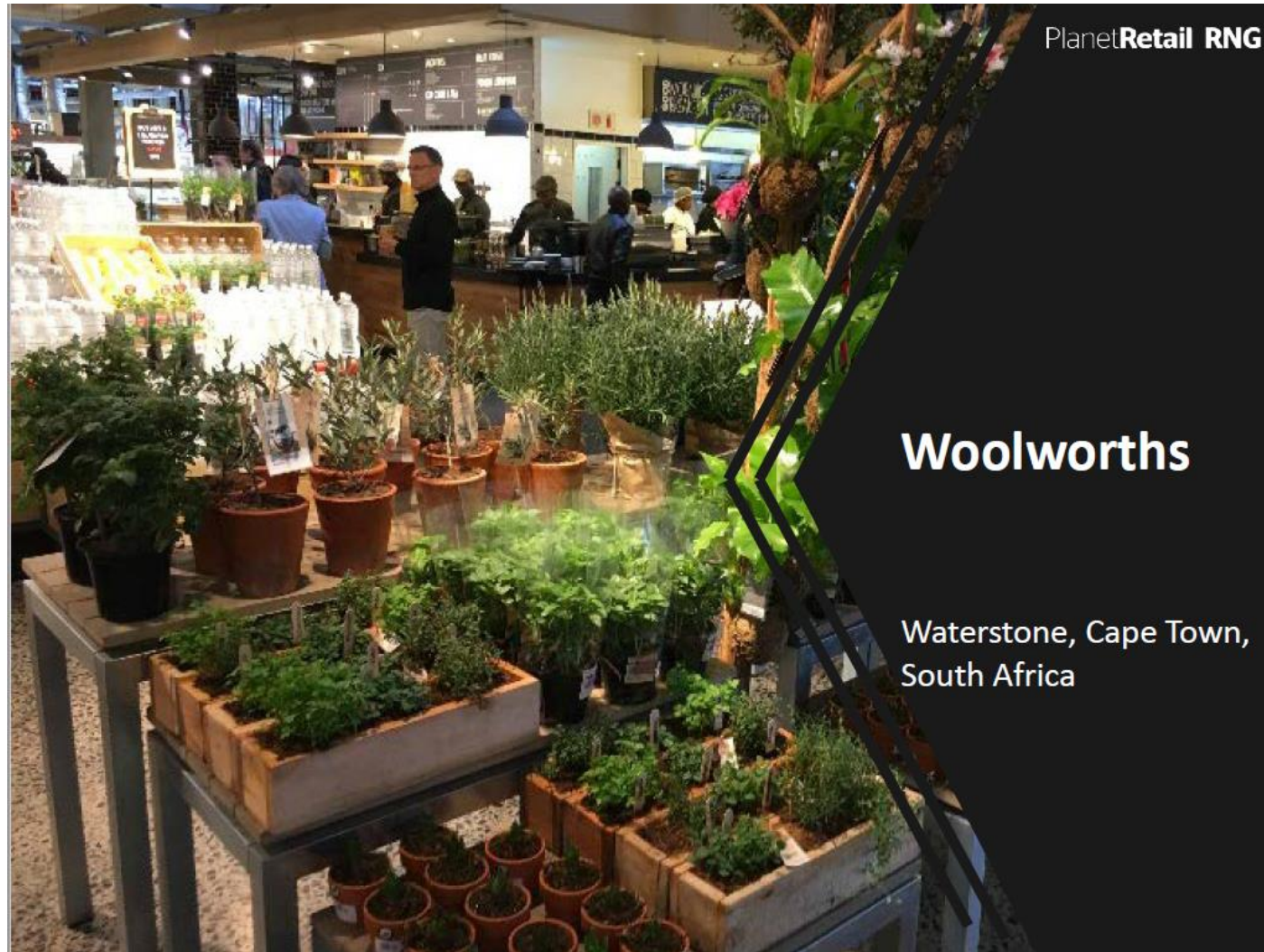
Soliflore



Crunchita /  
Verodita



# Acknowledgement and recognition by Planet Retail



# Acknowledgement and recognition by Planet Retail

WOOLWORTHS – WATERSTONE, CAPE TOWN

The store has an excellent fresh food offer.



The strong merchandising of fresh produce conveys product authority and uses product colour to add vibrancy into the category.



Instore theatre is reinforced through strong free-standing merchandising displays and areas such as fresh coffee beans (below).



Fresh flowers and plants at the entrance help reinforce the retailer's strong fresh and quality credentials.

# 3 exemplos do Inovação no Brasil

Thijs Hulisz

Chain manager Latin America



# SNACKPEP<sup>®</sup>

O PEPINO SNACK!  
conveniente  
& SAUDÁVEL



Variedades  
Rijk Zwaan



Produção  
no produtor



Embalagem  
do Brasil



Marketing  
Materiais

# SNACKPEP<sup>®</sup>

O PEPINO SNACK!  
conveniente  
& SAUDÁVEL

Produtor 	Varejista 	Consumidor 
Alta produtividade, precocidade	Vários produtores no Brasil	Alternativa saudável para lanches
produto diferente, com tamanho diferenciado	Apresentação na prateleira	Fácil, consumo direto
Partenocarpio	Alternativa saudável para lanches	Sem sementes
Produção padroniza	Durabilidade	
Marca, embalagem e suporte de marketing	Se encaixa no segmento tomate snack	

Produto disponível no mercado!

# SNACKPEP®

O PEPINO SNACK!  
conveniente  
& SAUDÁVEL



# Linha com tomate está chegando





Sweet**Palermo**®

A Pimenta **Doce**

**abras**®  
Essencial

  
RIJK ZWAAN





SweetPalermo®

**abras®**  
Essencial

## A Pimenta Doce

 <b>Produtor</b>	 <b>Varejista</b>	 <b>Consumidor</b>
Variedade disponível nas cores amarelo , laranja e vermelho	Vários modelos de embalagens disponíveis	Extremamente doce, frutado, pele lisa
Boa produtividade	Materiais de divulgação	Adequado a todos os métodos de cozimento
Vários modelos de embalagens disponíveis	Boa vida de prateleira	Receitas e inspiração no <a href="http://sweetpalermo.com.br">sweetpalermo.com.br</a>
O tipo saco está desenhado e pronto para uso	Diferencia-se de pimentas comuns em sabor e tamanho	Ideal para churrasco e saladas

Produto disponível no mercado!



# Sweet Palermo®

## A Pimenta Doce



**Sweet Palermo®**  
www.sweetpalermo.com.br

*a vida é doce*

**RECEITA: SWEET PALERMO RECHEADO**  
Por que não variar um pouco com Sweet Palermo?  
Sweet Palermo é ideal para ser preenchido com vários ingredientes... Inclua o que quiser!  
Aqui está uma maneira rápida e fácil de preparar uma refeição completa. Depois, tudo que você tem a fazer é servi-lo em suas louças mais bonitas.

**INGREDIENTES**  
1kg de quinoa vermelha  
2 colheres de sopa de azeite  
1 cebola, finamente picada  
200g de carne moída  
1 colher de colherada de mix de temperos para picadão  
2 tomates em cubos  
3 colheres de colherada de molho de tomate  
1kg de quinoa de cor vermelha, destemperada  
4 Sweet Palermo afilados

**MODO DE PREPARO**  
1. aqueça a quinoa a 100°C. Cozinhe a quinoa de acordo com as instruções da embalagem. Aguarde o dreno em uma fregesina e frite a cebola por 2 min. Adicione a carne moída e o tempero para picadão e frite por mais 3 min. Retire do fogo, adicione os tomates e deixe cozinhar um pouco.  
2. Corte os pimentos em uma fregesina seca por 2 min, até que estejam desmontados. Adicione 200g de carne moída. Frite os filhotes de berinjela e misture 200g de carne moída, adicione também o queijo de cabra e a quinoa. Prepare os Sweet Palermo afilados, enche-os com a carne moída e a quinoa e coloque no fogo. Fritados em Sweet Palermo com a carne moída misturada com a quinoa e coloque em um prato decorado com azeite. Anos em Sweet Palermo por apenas 20 min. Pálidos com o restante dos pimentos e berinjela.

**Sweet Palermo®**  
RIJK ZWAAN

**SWEET PALERMO É PERFEITO PARA QUEM QUER ADICIONAR SABOR E MUITA DOÇURA NO SEU DIA A DIA.**

**UM NOVO CONCEITO**  
Não é bom saber que algo tão gostoso, fácil e versátil na cozinha também tem um excelente valor nutricional?

**VERSÁTIL E COLORIDO COMO A VIDA DEVE SER**  
Garante o complemento perfeito para uma grande variedade de pratos: frios e quentes.

**MODO DE PREPARO:**  
Sweet Palermo pode ser grelhado, assado, cozido ou a vapor. Pode ser consumido cru, o que dará um toque surpreendentemente doce às saladas. Sweet Palermo pode ser servido como aperitivo. É ótimo para acompanhar carnes também. É o melhor de tudo, devido à sua doçura e ao seu toque sutil as crianças adoram!

**A riqueza nutricional do Sweet Palermo o torna um "super alimento".** É um passo adiante: é rico em vitamina C, sendo mais que o dobro da quantidade existente na laranja. Além disso, contém vitamina E, ácido fólico, magnésio, beta-caroteno e potássio.  
Dando força e equilíbrio para a sua vida!

# Pimentão Blocky



*Produto disponível no mercado  
Visita o nosso estande no espaço Rama*

# Pimentão Blocky

Produtor 	Varejista 	Consumidor 
Alta produtividade	Vida de prateleira - Shelflife	Sabor
Diferentes cores disponíveis	Peso	Crocante
Parede grossa	Tamanho	Doce
Resistências	Inovação	Durabilidade
	Combinação de cores	

Produto disponível no mercado!



Many thanks for your attention!  
Please visit us at our stand in **Espaço  
Rama**

Sharing a healthy future



# Questions and Discussion

Sharing a healthy future



**PRÊMIO 2018  
VAREJOS**

