

Argentina



Blueberries from Argentina

The Fresh and Early Quality Supply



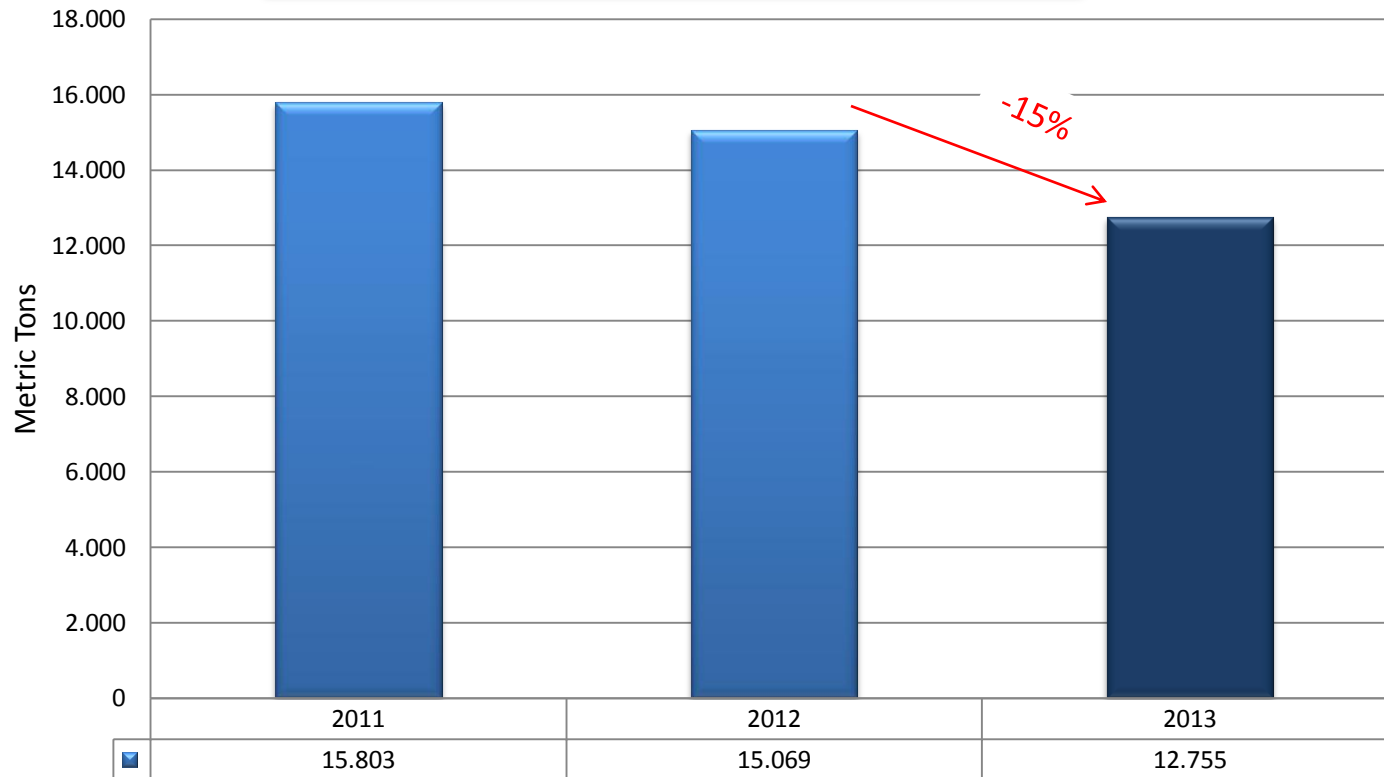
ARGENTINEAN
blueberry
committee

Index

-  I. Argentinean Blueberry Industry – Insight.
-  II. Argentina´s Blueberry Evolution – (2011 – 2013).
-  III. Natural Early Blueberry source for Europe.
-  IV. The Argentinean Blueberry Committee (ABC).

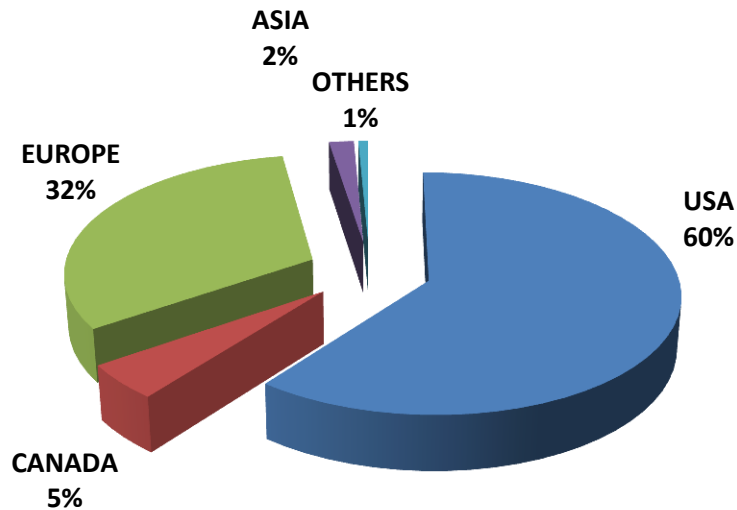
I. Argentinean Blueberry Industry – Insight.

Fresh Exports from Argentina 2011-2013

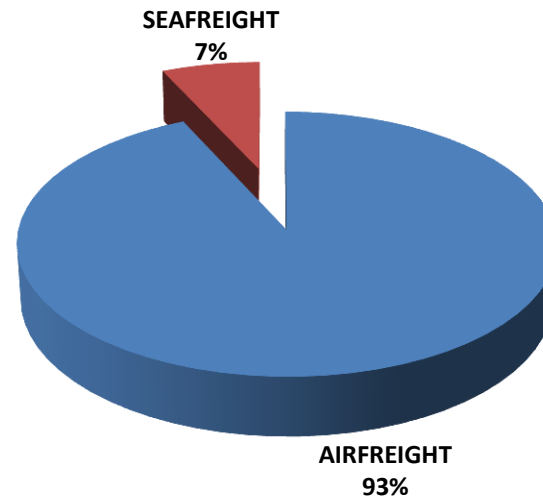


I. Argentinean Blueberry Industry – Insight.

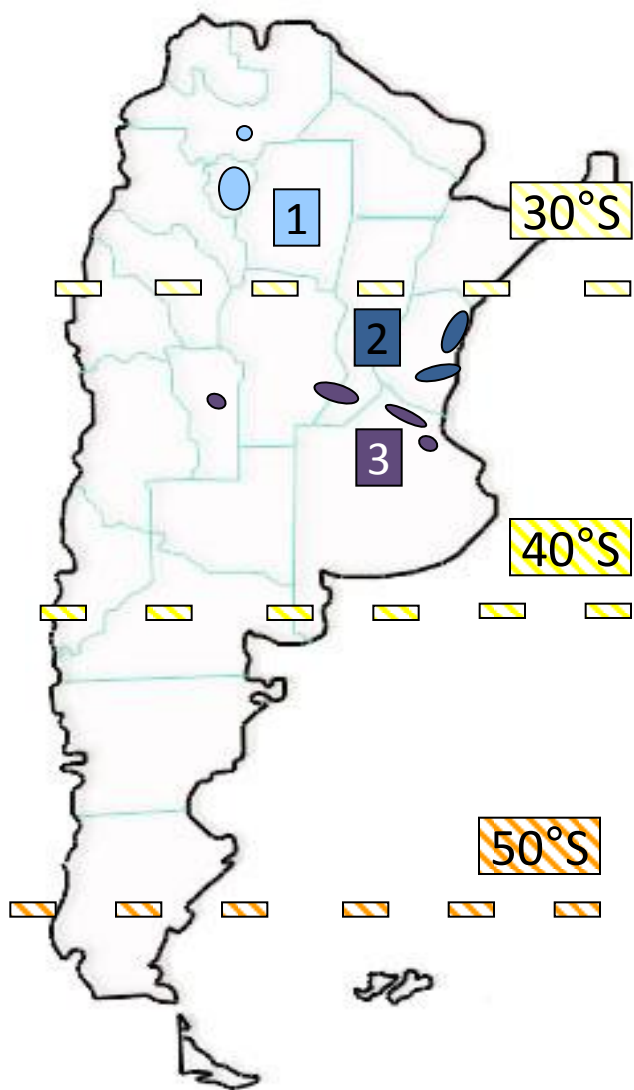
2013 Export Markets for Fresh Blueberries



2013 Fresh Blueberries - Logistics



I. Argentinean Blueberry Industry – Insight.



Tucumán & Salta

1

Planted Area: 1.200 has
Harvesting Period: weeks 36/37 to 46/47
2013 Production: 5.900 Tons

44%

Concordia

2

Planted Area: 1,000 has
Harvesting Period: weeks 38/39 to 48/49
2013 Production: 5.000 Tons

37%

Buenos Aires & rest


3

Planted Area: 500 has
Harvesting Period: weeks 41/42 to 51/52
2013 Production: 1.855 Tons

19%

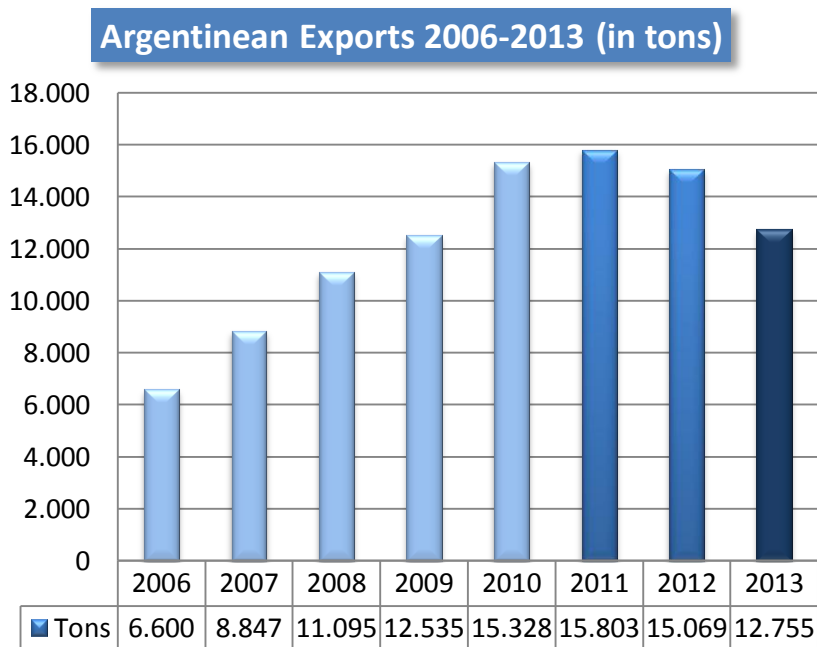
I. Argentinean Blueberry Industry – Insight.

Main Varieties:

 HARVEST BY VARIETY																
	AUGUST	SEPTEMBER				OCTOBER				NOVEMBER				DECEMBER		
VARIETY	32-35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50
Snowchaser																
Springhigh																
Primadonna																
Jewel																
Star																
Bluecrisp																
Oneal																
Emerald																
Misty																
Abundance																
Millennia																
Sapphire																

II. Argentina's Blueberry Evolution – (2011 – 2013).

Last eight year's seasons.



2006-2010: Rapid growth.

2011 & 2012: Stabilization & Variety Renewal.

2013: Two Major Climatic Events:

- Late Frosts in Tucumán & Salta.
- Tornado with Hail in Concordia.

II. Argentina´s Blueberry Evolution – (2011 – 2013).

a. Late Frosts in Tucumán & Salta.

- From July 21st until August 27th Tucumán and Salta had between 15 and 20 frosts.
- 5 of those with Temperatures -6°C or below.
- Min of -8°C in Salta.
- Apart from the lost production they caused considerable delay in the volumen arrivals.
- First reduction in Abc Estimates. From 16.000 to 14.000 tons.

II. Argentina's Blueberry Evolution – (2011 – 2013).

a. Late Frosts in Tucumán & Salta.



II. Argentina's Blueberry Evolution – (2011 – 2013).

a. Late Frosts in Tucumán & Salta.



II. Argentina's Blueberry Evolution – (2011 – 2013).

a. Late Frosts in Tucumán & Salta.



II. Argentina´s Blueberry Evolution – (2011 – 2013).

b. Tornado with Hail in Concordia.

- October 11th 4 AM.
- Week 41. Less than 4% of the Season Harvested.
- 55mm of rain and hail in 15 minutes.
- Winds with gusts of more than 100km/h.
- Big and focused damage in an area that concentrates 50% of Concordia´s volume.
- Estimated loss of 3.000 tons.
- Second recuction in Abc Estimates. From 14.000 to 11.000 tons.

II. Argentina's Blueberry Evolution – (2011 – 2013).

b. Tornado with Hail in Concordia.



II. Argentina's Blueberry Evolution – (2011 – 2013).

b. Tornado with Hail in Concordia.



II. Argentina's Blueberry Evolution – (2011 – 2013).

b. Tornado with Hail in Concordia.



III. Natural Early Blueberry source for Europe.

Advantages for Argentina

- Perfect window for early fruit.
- No fumigation required for Medfly.
- Market with impressive growth rate.
- Excellent options for airfreight fruit.
- Very well linked by Seafreight Companies.

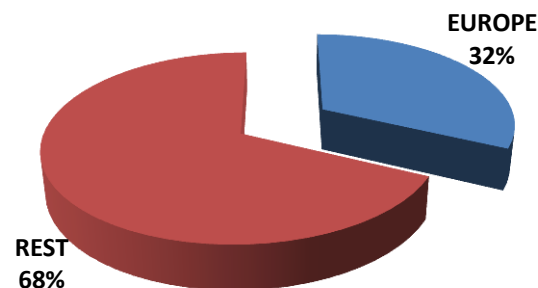
Advantages for Europe

- Early Fruit matches when late Polish and Dutch fruit is scarcing.
- Higher quality and varietal options than other Southern Hemisphere suppliers.
- Very good air logistic options with direct flights to AMS, FRA, CDG and LHR.
- Good seafreight linking provides a good pricing fruit from November to January.

III. Natural Early Blueberry source for Europe.

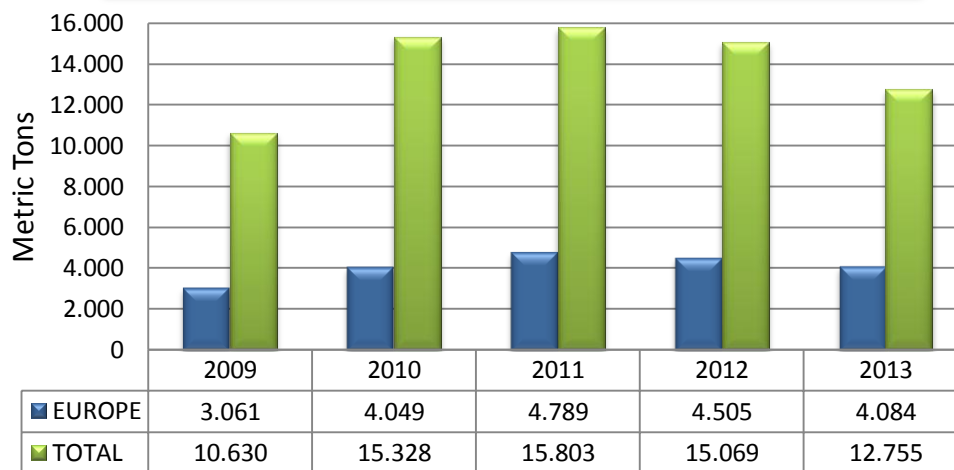
	2012	2013	var %
TOTAL	15.069	12.755	-15%
USA	9.475	7.733	-18%
CANADA	732	614	-16%
EUROPE	4.505	4.084	-9%
ASIA	313	231	-26%
OTHERS	44	93	111%

2013 Export Markets of Fresh Blueberries



Fresh Exports from Argentina 2009-2013

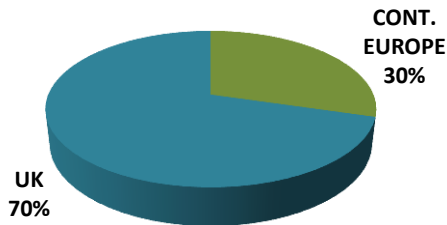
YEAR	EUROPE	TOTAL	% SHARE
2009	3.061	10.630	29%
2010	4.049	15.328	26%
2011	4.789	15.803	30%
2012	4.505	15.069	30%
2013	4.084	12.755	32%



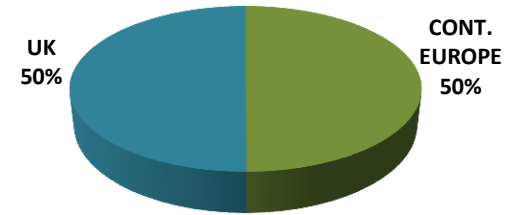
III. Natural Early Blueberry source for Europe.

UK & Continental Europe.

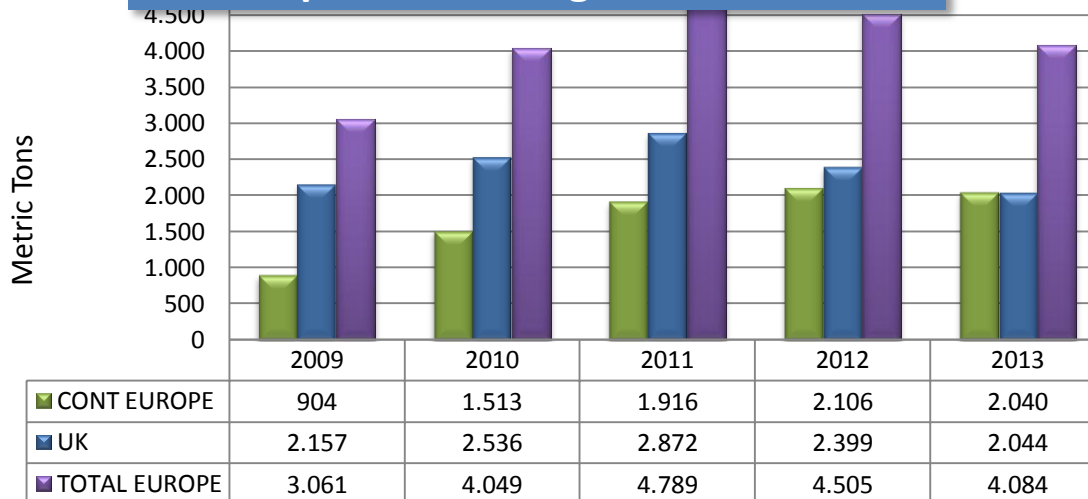
2009 Export Markets of Fresh Blueberries



2013 Export Markets of Fresh Blueberries



Fresh Exports from Argentina 2009-2013



YEAR	UK	CONT.EU.
2009	20%	9%
2010	17%	10%
2011	18%	12%
2012	16%	14%
2013	16%	16%

IV. The Argentinean Blueberry Committee (ABC).

- Non Profit Organization Established in 2010.
- Supported solely by it's Company members.
- Among them it includes 15 Producers and/or Exporters of Fresh Blueberries, 3 Regional Producer's NPO and 1 Processed Blueberry Company.
- By 2013 accounts for more than 80% of Argentinean Blueberry Exports.



IV. The Argentinean Blueberry Committee (ABC).

- Source of information for all the industry as well as the worldwide markets.
- Position Argentina as a reliable supplier of blueberries to the world.
- Assist in the improvement of the conditions of the whole local industry.
- Develop new markets.
- Achieve a sustainable growth of Argentinean exports throughout the whole production chain.



THANK YOU!



For more information:

www.argblueberry.com

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