



“World table grape supply, strong incomers into our business”

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SAVE THE DATE

MÉXICO
Spring Summit

SAN DIEGO, CA.

04-20-2024



PROTEKU
GRAPE GUARDS®

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INFRUTA
CHILE

'A grape idea'

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Highlights



- We are in a highly integrated business, focusing towards the retail, 52 week oriented and interrelated with what is happening in almost all producing and/or exporting countries in the world.
- We cannot see our business only with a local perspective.
- The challenges are transversal, and we are united by some common factors among all.....weather uncertainty, the political – logistics environment and the consumers.





Who do we owe?

In our business, we have very little access to the **consumer**, we focus on the client, and this is a mere link in the chain, but from whom we do not always receive information or solid data, to conclude about our consumers need, which is our ultimate goal and reason why we must strive to exist and is who justifies our demand.





Sainsbury's October – November 1985

SPECIAL OFFER

AMERICAN CLASS I

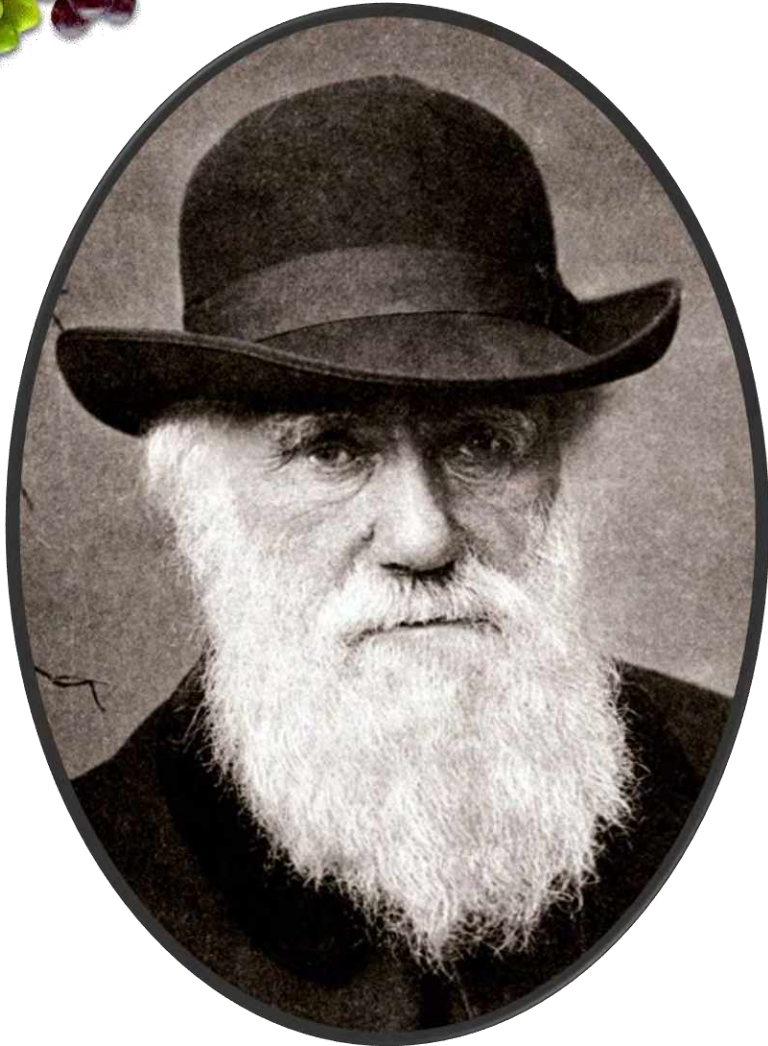
Seedless White Grapes loose-per lb

~~£1.85~~

£1.75

GOOD FOOD COSTS LESS AT SAINSBURY'S

2022 and 2023 October – November
£1.50 – 1.75 /lb within the top high-end UK retails



“It's not the strongest species that survives, nor is it the most intelligent that survives. It's the one that most adapts to change ”.....and who learns to innovate (said by me Coco Salgado)

Phrase attributed to Charles Darwin

1809 - 1882



***¿Can't you see that we are extremely busy,
come back another day with your silly ideas !!!!!***





The human brain is like a parachute...if you don't open it...it doesn't work

Albert Einstein



"Before you shake your head, make sure you have it"

Truman Capote
(1924 - 1984)



PROYECCIÓN VS EXPORTACIÓN - PERÚ / CHILE / SUDÁFRICA



REPRESENTATIVIDAD EXPORTACIONES POR GRUPO VARIETAL - TOTAL



TOP 5 VARIEDADES MÁS EXPORTADAS TOTAL - PERÚ / CHILE / SUDÁFRICA



PROYECCIÓN VS EXPORTACIÓN PERÚ



PROYECCIÓN VS EXPORTACIÓN CHILE



PROYECCIÓN VS EXPORTACIÓN SUDÁFRICA



EXPORTACIÓN POR VARIEDADES, SEGÚN GRUPO VAR. PERÚ



EXPORTACIÓN POR VARIEDADES, SEGÚN GRUPO V. CHILE



EXPORTACIÓN POR VARIEDADES, SEGÚN GRUPO VAR. SUDÁFRICA



EXPORTACIÓN POR DESTINOS PERÚ / CHILE / SUDÁFRICA



EXPORTACIÓN POR DESTINOS PERÚ / CHILE / SUDÁFRICA



EXPORTACIÓN POR DESTINOS PERÚ / CHILE / SUDÁFRICA



EXPORTACIÓN SEMANAL POR DESTINOS PERÚ / CHILE / SUDÁFRICA



PROYECCIÓN VS EXPORTACIÓN - PERÚ / CHILE / SUDÁFRICA



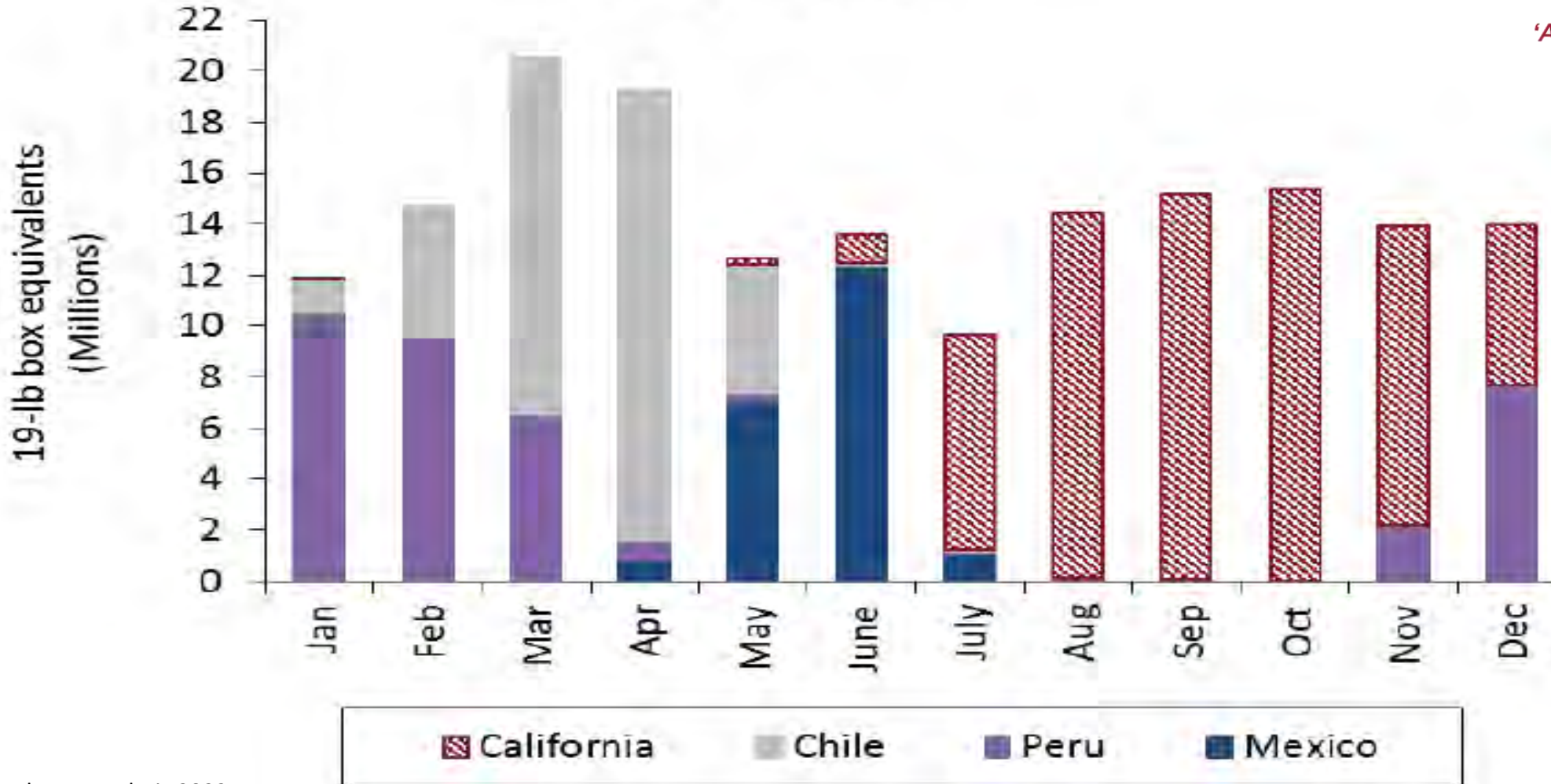
“Coopetition”
Compete + Cooperate

MÉXICO
table grapes





U.S. Consumption of Table Grapes by Month Jan-Dec, 2022

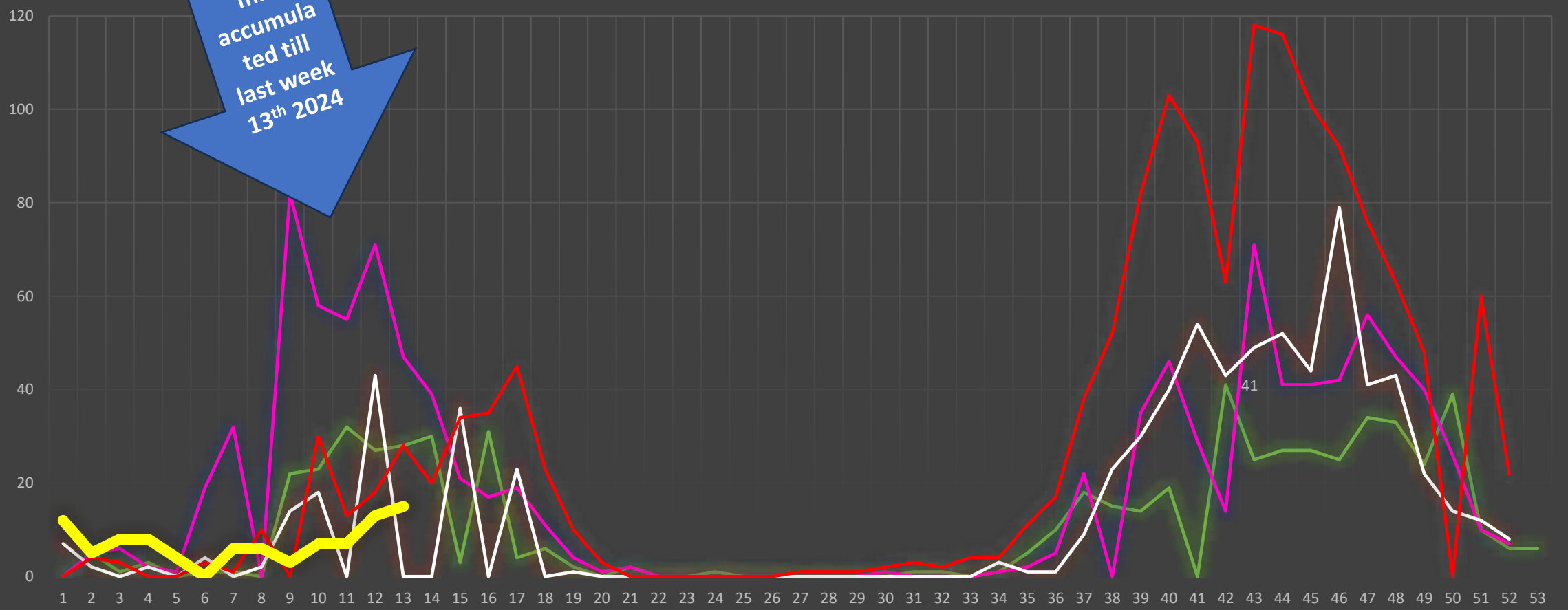




CONTAINERS BRASIL- USA week 13

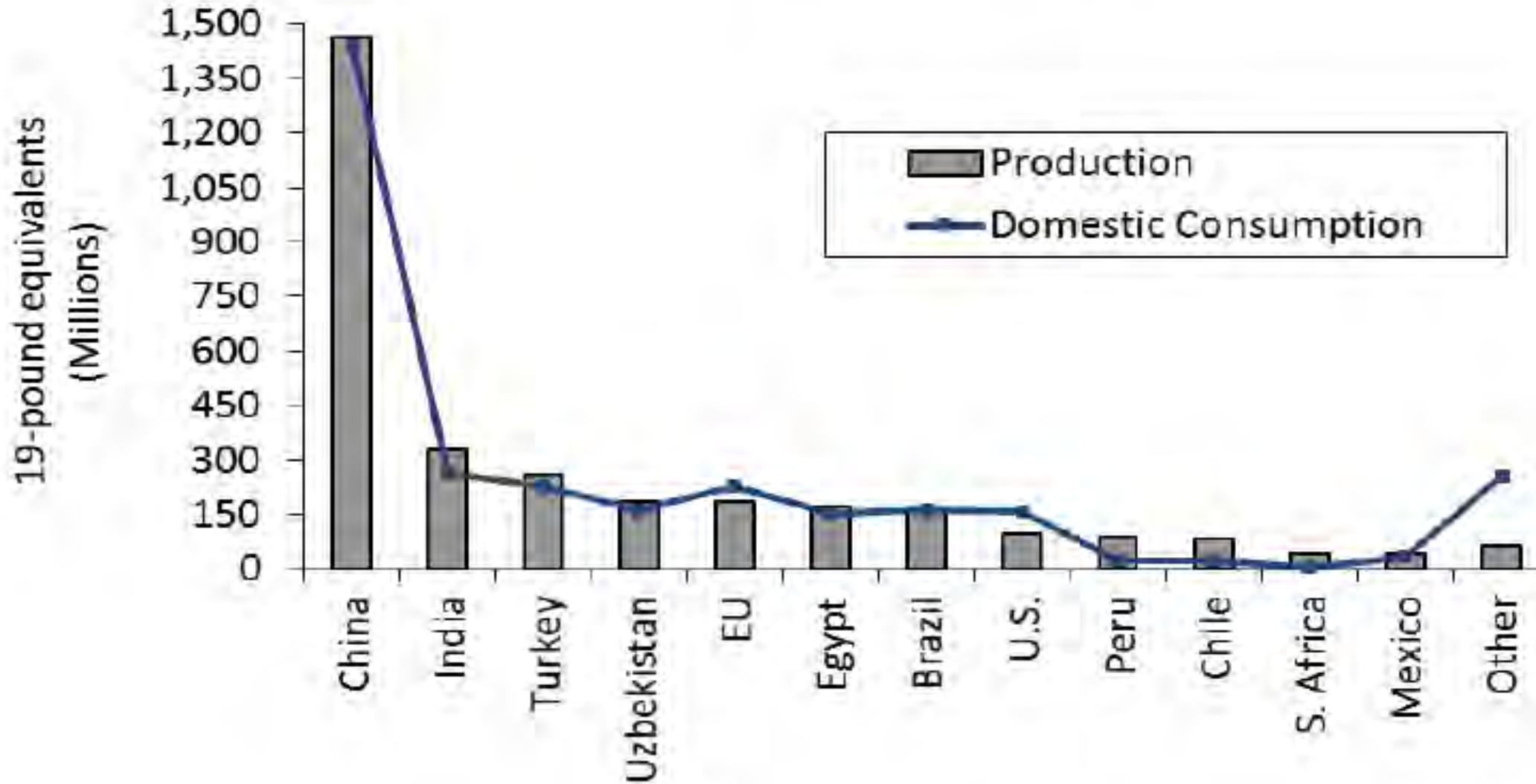
— 2020 — 2021 — 2022 — 2023 — **2024**

50 to 900 mm accumulated till last week 13th 2024





Fresh Grape Production and Consumption By Country, 2022-23





Before



**Investment
Funds**

Now





Table Grape Revolution

Tropical and subtropical
Table grape production

Embryo rescue
Genetics
(Gen Editing)

Middle class



Improvement in
production
techniques



Key Drivers

Improvement Pre
and Post Harvest
Technology





Hypothesis

*“Whatever one man can imagine;
another man can make come true”*

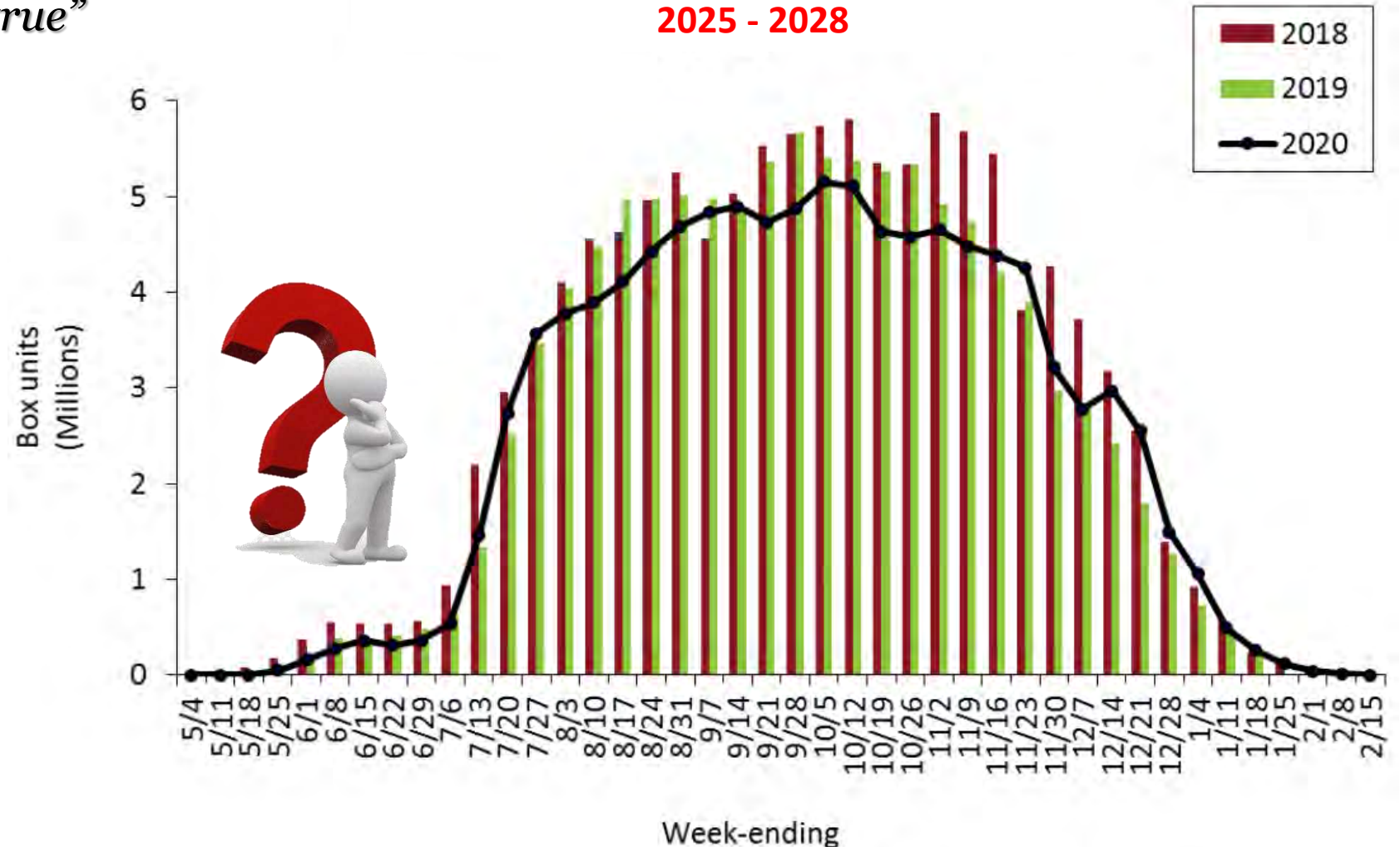


Julio Verne
1828 - 1905

Weekly Uzbekistan Table Grape Shipments
2025 - 2028

Weekly Chinese Table Grape Shipments
2025 - 2028

Weekly Spain and Italy Table Grape Shipments
2025 - 2028



***Colon and
his damn
theories..!***



***We've been talking about these since 2004-7 with
Victor "Pinche Pajarito" Giancaspero***



El mapa de oferta de uva de mesa tendrá un cambio dramático en los próximos años

- **The discovery of subtropical or tropical areas (towards the equator)** with dry periods allows the harvest to be moved or managed according to the market need of each market, Gap or unreliable supply.
- **The new varieties (the successful ones)** will enhance the impact of these new areas, use of plastic (late/early/rain/color) for some years now, are valid strategies that are more accessible, new PGR (ABA) allow production in areas in that before colour was too restrictive.
- **While the market is cleared of “losing” varieties (Melisa/Princess, Regal, Jade/King Hussein, Red Seedless/Emperatriz, Down Seedless, Perlette),** we will have strong confusion, but traditional varieties will maintain or play a role. for a long period of time, while maintaining the profitability of the business.....Profit!!!).
- **Focus or concentrate on trial / test blocks and local evaluations** of each variety, depending on local needs, which may be:
 - **Production cost** (thinning, pruning, clearing, leaf removal, harvest)
 - **Restriction or weather problems** (Colour, lack of light, rain)
 - **Market access** (colour, sizes, harvest life/traveling grapes)

There is no single formula to evaluate, select and make decisions for the selection of a new variety.

Princess/Melissa is a variety with a relative level of success in CA – US and Spain



- **We could have local varieties** or for different agroecological realities
- **Each new variety, for a long period of time, will have an associated business model**, the “Free Varieties” are finished or when we were able to avoid paying the Royalty.
 - **Crimson, Flame, Autumn Royal, Red Globe and Sugraone**
- **We will have, some private varieties** or we produce to order.
- **Some traditional table grape production areas** will tend to disappear or reduce their role, especially in countries with "well-established" industries.
- **These are times to analyse every angle of our business** and think about every move, but without the luxury of time, collateral damage and losses for many producers/exporters and importers will be more of a trend.
- **Perhaps we should be questioning our participation in some Markets** and abandoning some Markets.
- **Table grapes will tend to become commodity.....52 weeks**
- **Consolidation and concentration of production**, fewer but larger producers



What do we have to do or what should we do?

- Promotion by all possible and imaginable means, be on all platforms and social media (anime?).
- Focus all associations as joint promotion on 2 - 3 key markets promoting the "Table Grape Brand" (Avocado or Mango Model?)
- May the grape be a product that enchants and seduces.....playful!!!!
- Long-term relationships by getting to know our client and my client's client (consumer) more, going to the sales area more often and getting to know us more.
- Avoid supply surprises and just as we ask for markets and price reports, well report our campaign weekly.
- Costs, production and productivity at a competitive quality and condition.....**continuous improvement**
- Know in detail the strengths and weaknesses of our internal and external competitors
- Innovation/technology/training/Human resources
- Leave **Quality Control** to **Quality Assurance** por todos los medios posibles e imaginables.









What the customer in China asked for



What my good Salesman quoted



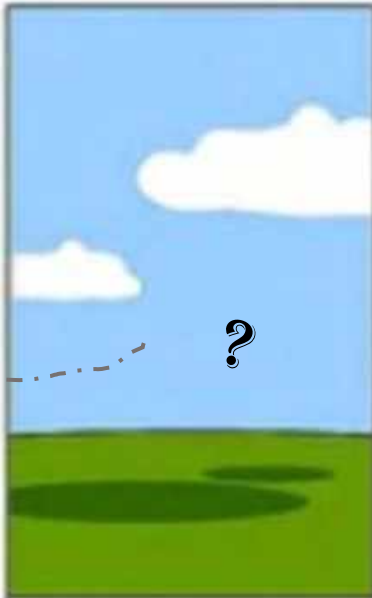
What the commercial instructed to the production



What the Agronomist understood



What the Agronomist instructed the producer



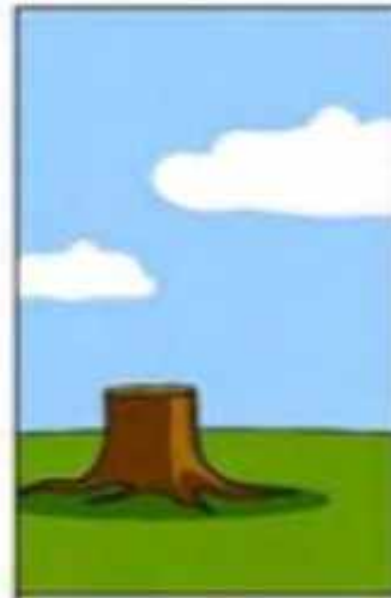
What the Producer understood



What the Packing Manager Receives as Instructions



What Was Finally Packed



What was loaded from the stock in the Container



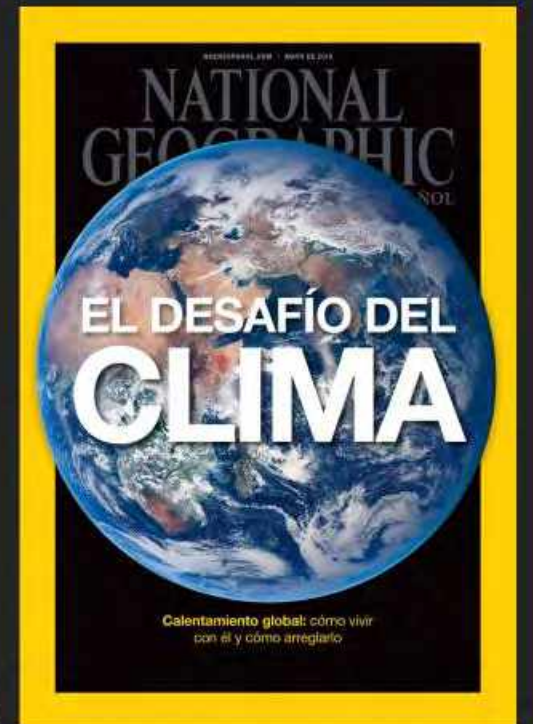
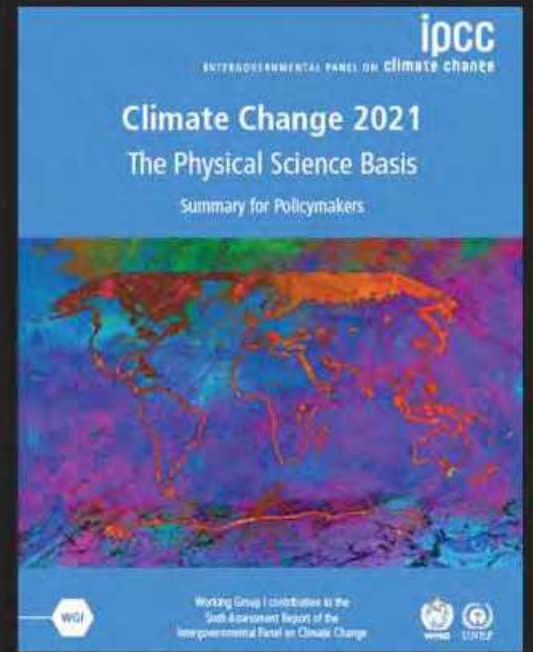
What the Chinese consumer was looking for

Regardless of whether we are defenders of climate change or skeptics, something is happening with our climate

We have more and more “events” of very high frequency, predicted with very little notice, more extreme and high impact.



Last call.

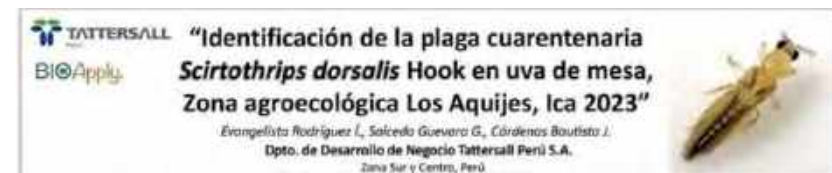




Climate change and potential effects in table grape

From Weather risk to a Weather uncertainty

Explosive new plague Thrips arrived in Peru 2022



Autumn Crisp in UK season 2022 origin Spain full of seeds

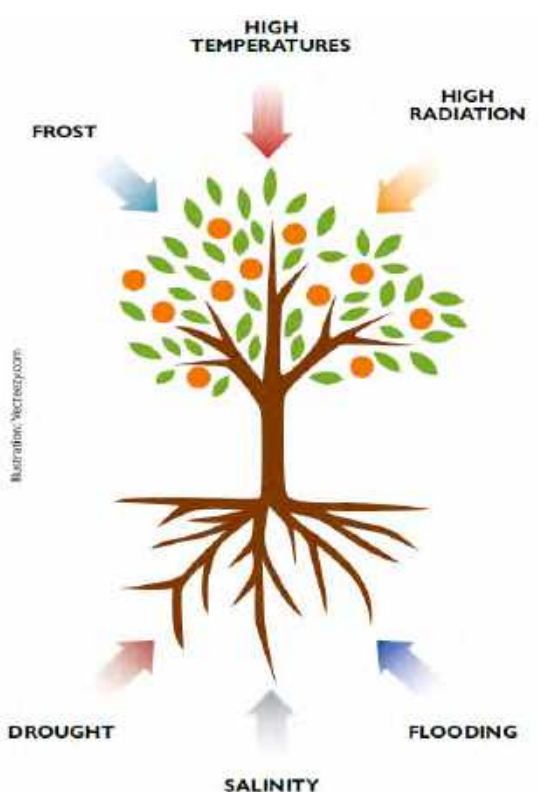


- ➔ Increase of the temperatures.
Increase of the evapotranspiration.
Early picking or shorter production cycles.
Overlap of pest generations.

Abiotic and biotic stress (O. Salgado)
- ➔ Less timespan to predict extreme and more intense weather events.
- ➔ Changes in the rainfall patterns affecting more the mediterranean production zones
- ➔ Alteration of the snow isotherm
- ➔ Less chilling hours accumulation

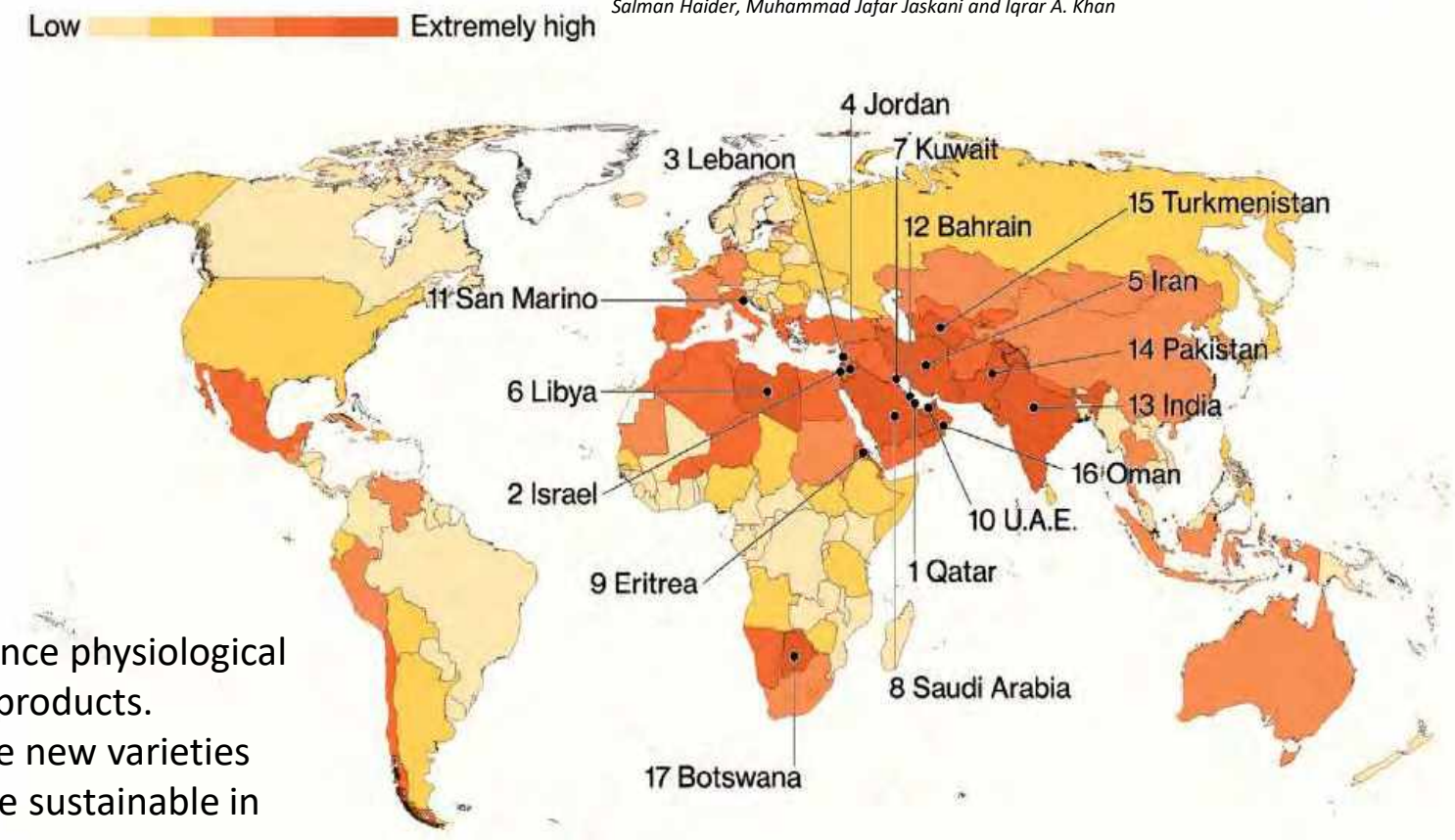


Fuente: Stress abiótico A. Azancot 2020




Top 17 countries facing the risk of extremely high-water stress

Source: Climate Change and Citrus Waqar Shafiqat, Summar A. Naqvi, Rizwana Maqbool, Muhammad Salman Haider, Muhammad Jafar Jaskani and Iqar A. Khan



Due to climate change, cultivated citrus trees may experience physiological problems leading to a decrease in production and quality products. Scientific knowledge must face this challenge and generate new varieties and rootstocks that allow citrus trees to adapt and become sustainable in these new environmental conditions.

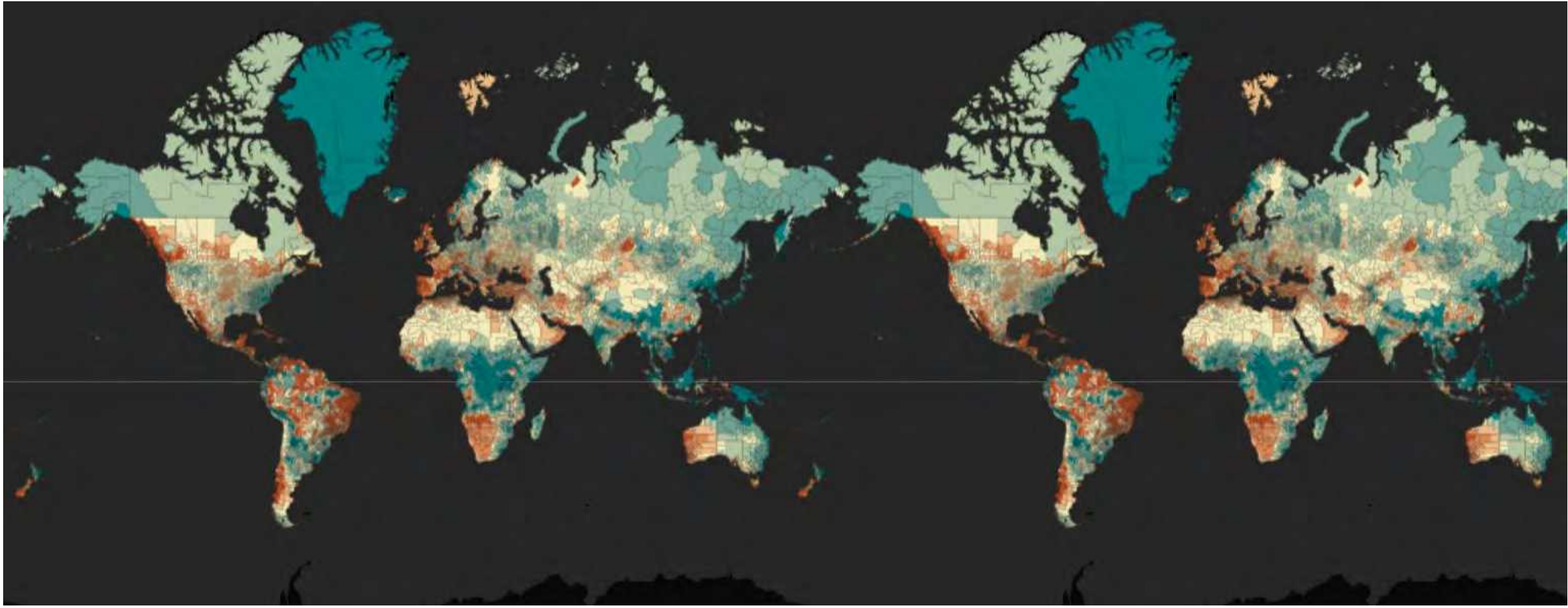
CITRICULTURE IN TIMES OF CLIMATE CHANGE	
Threats	Adaptation
Increased oxidative damage	Scientific knowledge
Decreased photosynthesis	Variety breeding
Reduced growth	Rootstock breeding
Increased sensitivity to drought	Cultivation techniques
Loss of production	Resource optimisation
Salinisation	
Crop soil deterioration	

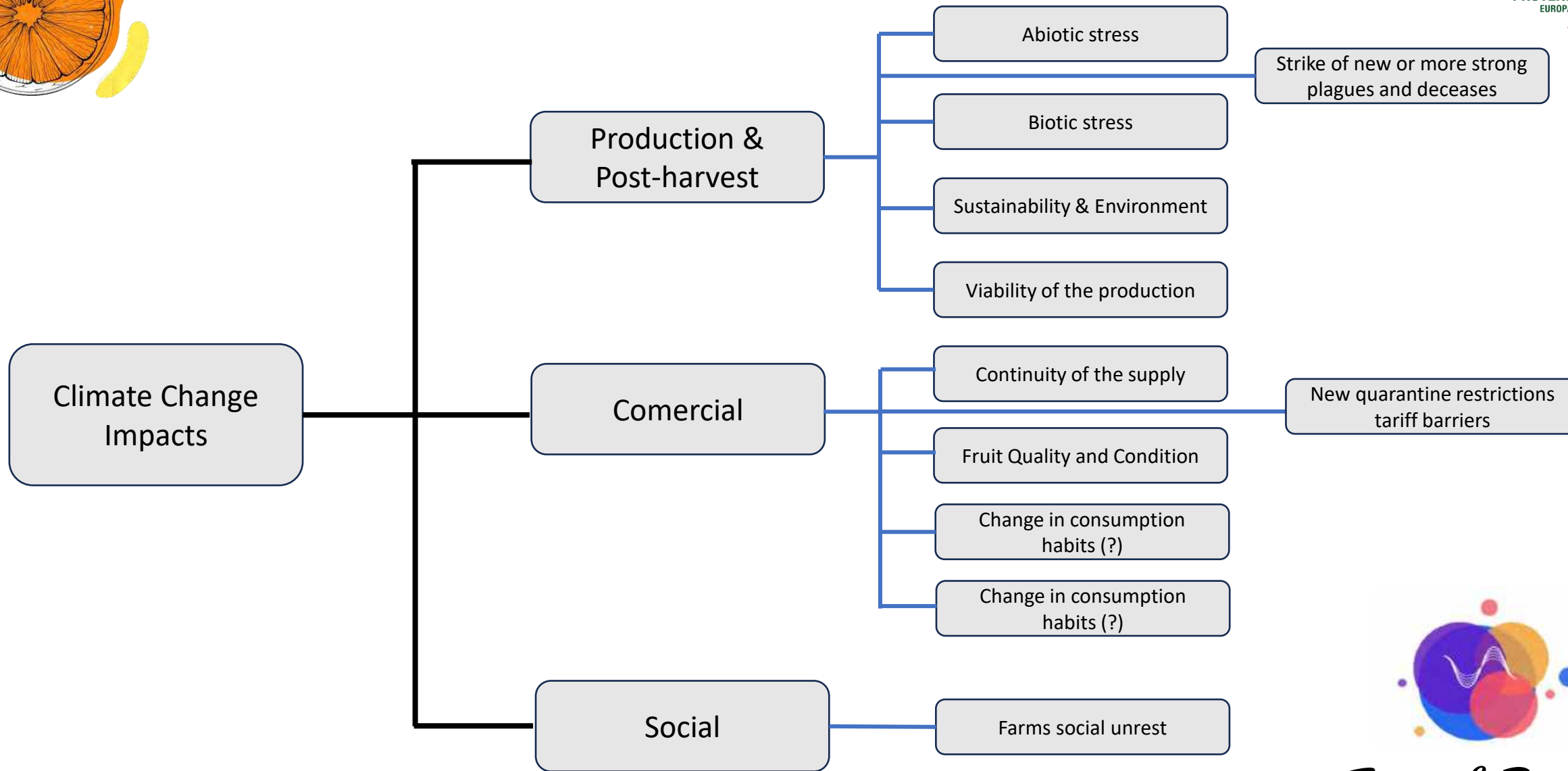
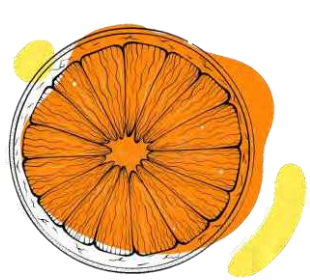


Source: Meto de Science Studies Journal, 12 (2022): 123–129. University of Valencia. <https://doi.org/10.7203/metode.12.20319>
 ISSN: 2174-3487. eI SSN: 2174-9221. Submitted: 02/02/2021. Approved: 23/04/2021.



Interactive Map: Precipitation in the 2050' s







Climate uncertainty

Abiotic Stress



Biotic Stress



Logistic





What Then are the Problems?
What is in our hands....to solve??

Hurricane Hilary

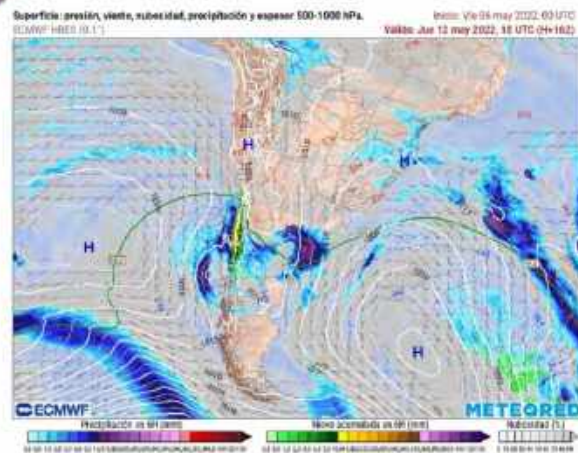


ciclón "Yaku"

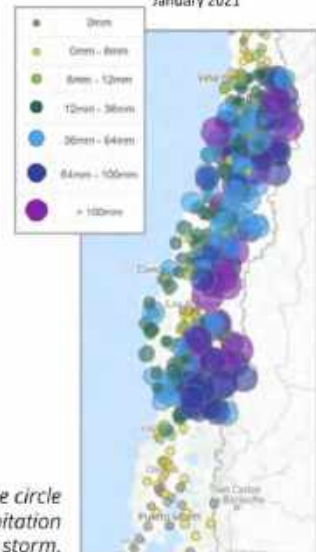
Marzo 2023



Atmospheric River Chile January 2021



Accumulated rainfall between 27th to 31st January 2021



The size and color of the circle shows the precipitation accumulated during the storm.

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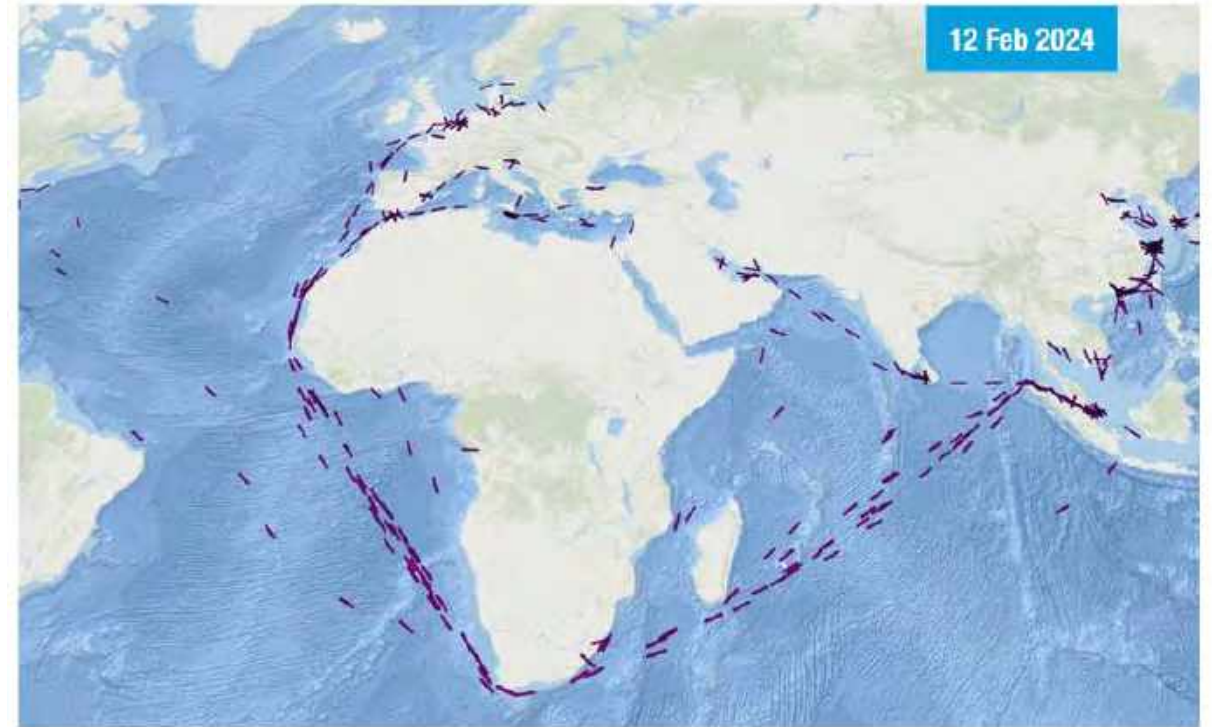
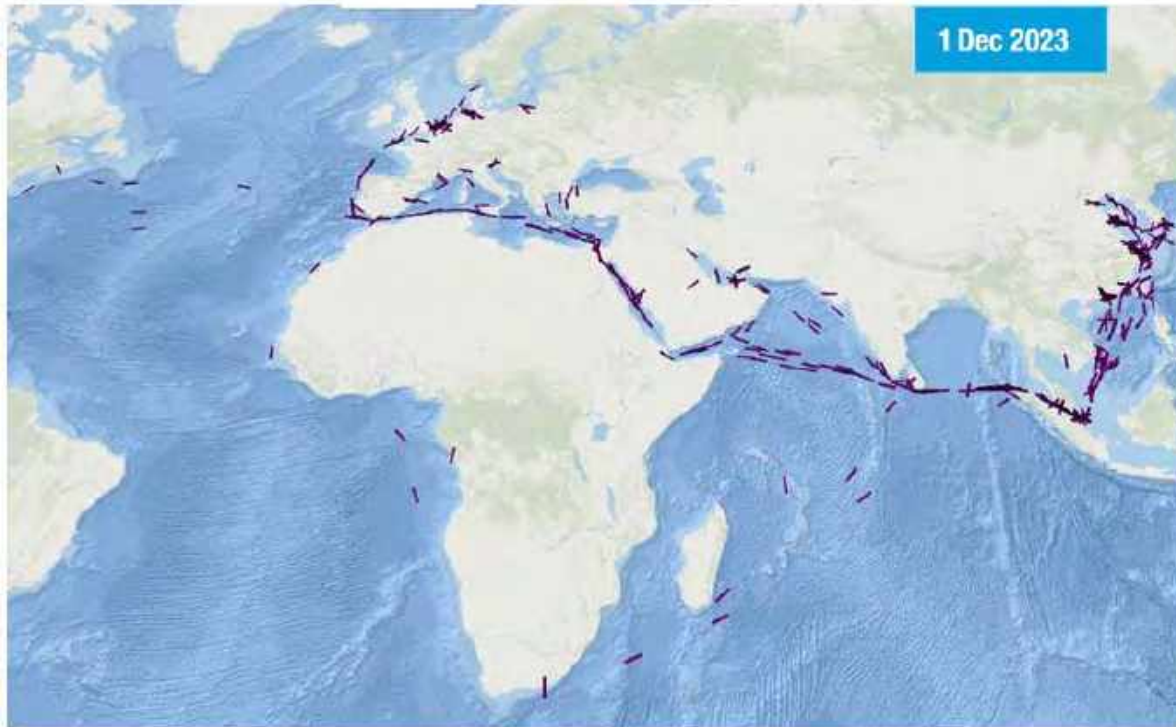
'A grape idea'

The probable path of Hurricane Hilary on Aug. 17, 2023. (NOAA)



Logistic

Change in container ship routes from the Suez Canal to the Cape of Good Hope because of attacks by Yemen's Houthi rebels.



As of February 1st, 2024, the drop through the Suez Canal was 82%



**Panama Channel
2023-24**



Baltimore 2024



**Evergreen
Suez Canal March 2021**



Logistica

“The line between order and disorder lies in logistics”

Sun Tzu; Chinese general, soldier and philosopher, author of “The Art of War” (6th century BC)



“My logisticians are a group without a sense of humour. They know that if my campaign fails, they will be the first ones I kill”

Alexander the Great; King of the Macedonian Empire (356 BC – 323 BC)



“Only with prudence, wisdom and skill can great goals be achieved, and obstacles overcome. Without these qualities nothing is successful.”

“An army marches on its stomach”

Napoleon Bonaparte (1769 – 1821) was a military general and the first emperor of France.



Transit time Peruvian and Chilean Table grape to a various market or regions



Consider 7 to 10 days between harvest and dispatch, final sells 20 – 21 days on top of the transit time

Note: + means additional delays in days between the ETD - ETA / TT in days

Source: O. Salgado 2013/17/18/18/20 collected from a number of shipping line operating in Chile and C. Soazo 2020

Transit time South African Table grape to a various market or regions



Consider 7 to 10 days between harvest and dispatch, final sells 20 – 21 days on top of the transit time

Note: + means additional delays in days between the ETD - ETA / TT in days

Source: compiled by O. Salgado, information from P. van Schalkwyk 2020



'A grape idea'

Covid..... and its consequences

**Sweetheart, your
daddy wore a mask,
and I still don't
recognize him.....**

**Cariño, tu papá usaba
una máscara y todavía
no lo reconozco.....**





Quality?



- **Table Grape Quality,**
- Factors that do not change in reasonable commercial times of post-harvest with traditional technical management, to the market.
- Determined at the time of harvest and product of agronomic/technical field production management.
- Levels of soluble solids (°Brix).
- Total Titratable Acidity Levels (%)
- Cluster Weight
- Berry weight
- Berry length and equatorial diameter
- Crunchiness
- Berry color
- Cluster Conformation

- **Table Grape Condition,** *'A grape idea.'*
- Dynamic factors that change or evolve at different speeds in reasonable post-harvest commercial times with traditional management, to the markets.
- Associated with the senescence of the fruit and its tissues, influenced by orchard management, pre-harvest, post-harvest culture, design and cold management, design of packaging materials, including internal ones and logistics management.
- Decays
- Internal and external browning
- Pedicellar tear and berry shattering / drop
- Fine, micro and macro cracking / berry split.
- Bleaching
- Dehydration of berries and stem or rachis



Cluster fresh from a harvest lug, which does not need "work" with the natural bloom or wax

Shining Cluster without bloom or natura wax and "clean/trimmed"



The Exporting Producer or Marketer Drivers

• Field or production drivers

- Logistical improvements
- Budget, administration, implementation, correction and control.
- Administration and allocation of resources.
- Agricultural Labor Administration (Human Resources)
- Technical management and administration
- Continuous improvement (quality / efficiency / KPI ratios)
- Technical and management audits (Quality Assurance against Quality Control), evaluation of what was implemented
- R+D+I (field trials) = Technology / Management techniques.
- Labor cost and availability
- Weather uncertainty
- Certifications

Efficiency and cost control

Tools for decision-making, implementation and auditing - correction

• Market Drivers

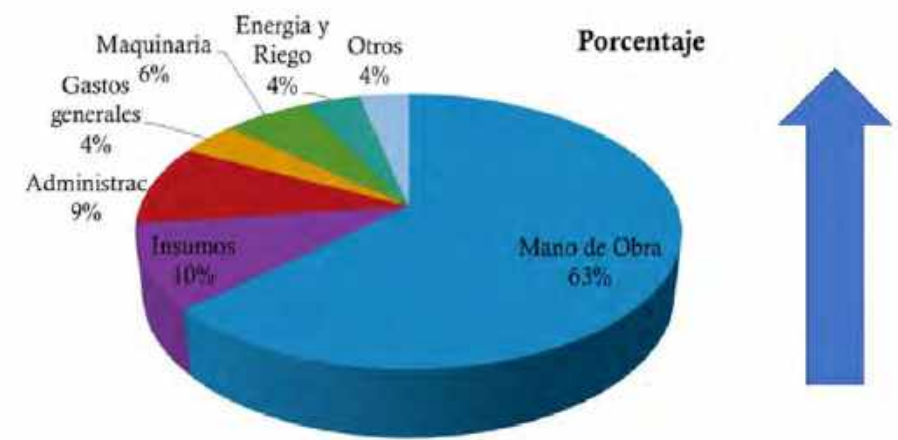
- Diversify markets
- Know (where it operates) and understand (how it operates) your customer/importers
- Retail-oriented and programs
- What your customer needs
- Know your client's customer as much as possible, so know the client of your client.
- Your cost string will be 3 digits after the comma
- Know your customer's cost chain
- Compliance and certifications
- Commercial discipline and taking your service level to your customer at +90%
- Avoid lack of supply and compliance with program deliveries

Market Strategy & Tactics

How do I differentiate myself from my neighbour and the outside alternative?



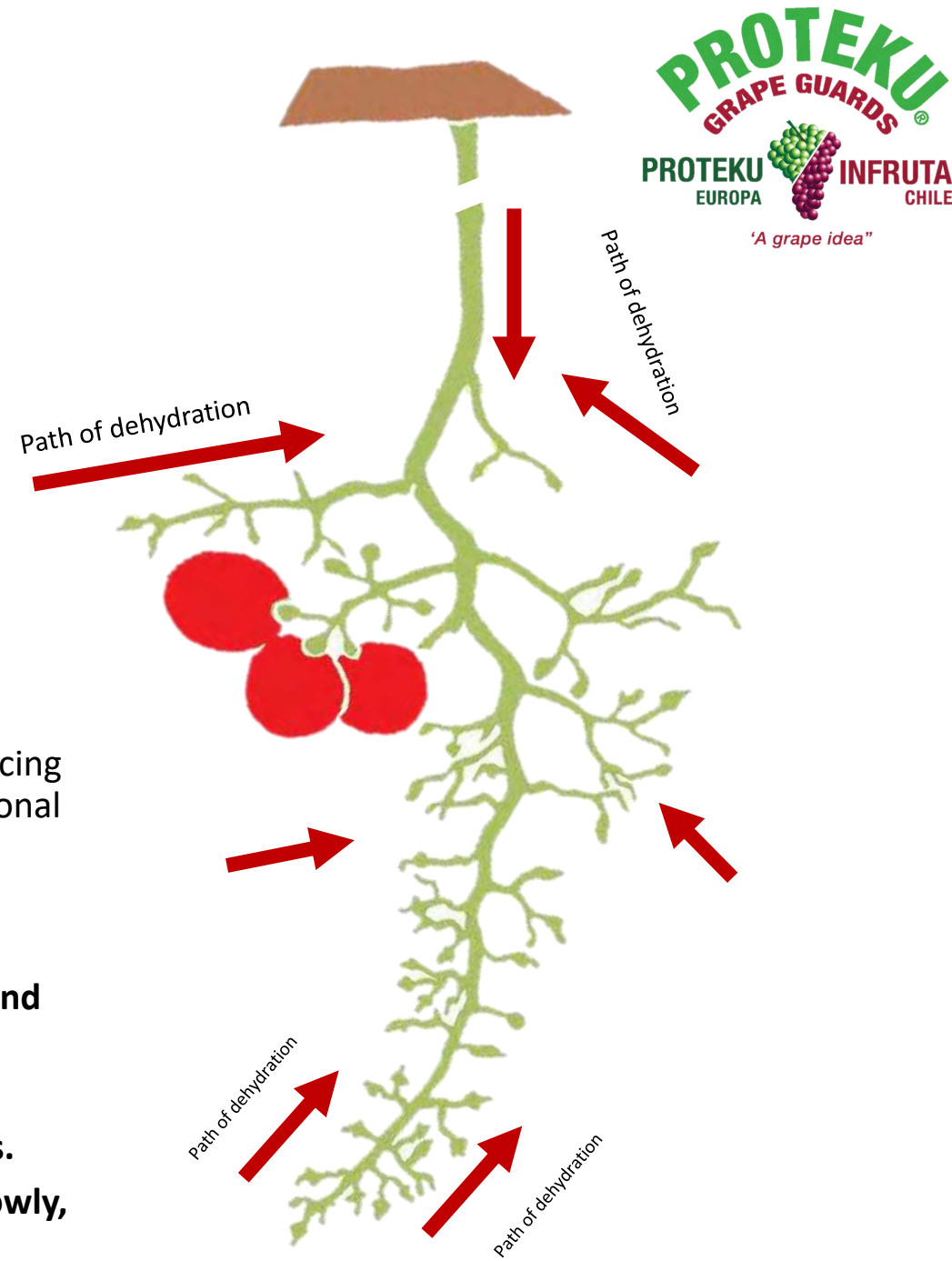
My direct Cost of Production





Dehydration Symptoms

- **Brown Tissue:**
 - Starts in cut zones
 - Its peripheric (from outside to inside of the stem) and starts in the thinner structures.
 - Browning and dehydration and related processes.
 - Loss of weight of bunch/cluster weight.
 - At the berry, the symptom is shrivelling, but rarely we see it.
- **Dehydration and browning development rate can be reduced**
 - **Enzymatic Oxidation:**
 - Use of citric acid in the foliar applications especially in the stems reducing the pH of the solution to 5 (need further trials H. Mendoza 2023 personal communication)
 - Use of algae extracts (further trials H. Mendoza 2023 personal communication).
 - **SO2 specially in gassing and controlled emission of SO2 sheets Top and Bottom pads or grape gas or SO2 sheet.**
 - **Dehydration :**
 - **Reducing DPV from harvest and forward in every step of the process.**
 - **Thick stems tend to manifest the symptoms of dehydration more slowly, stems vigour.**





Grape Condition, the stem our headache Physical Phenomena



Green



Partially brown pedicels



Pedicel and part of the rachis dry



Pedicels and central rachis partially brown

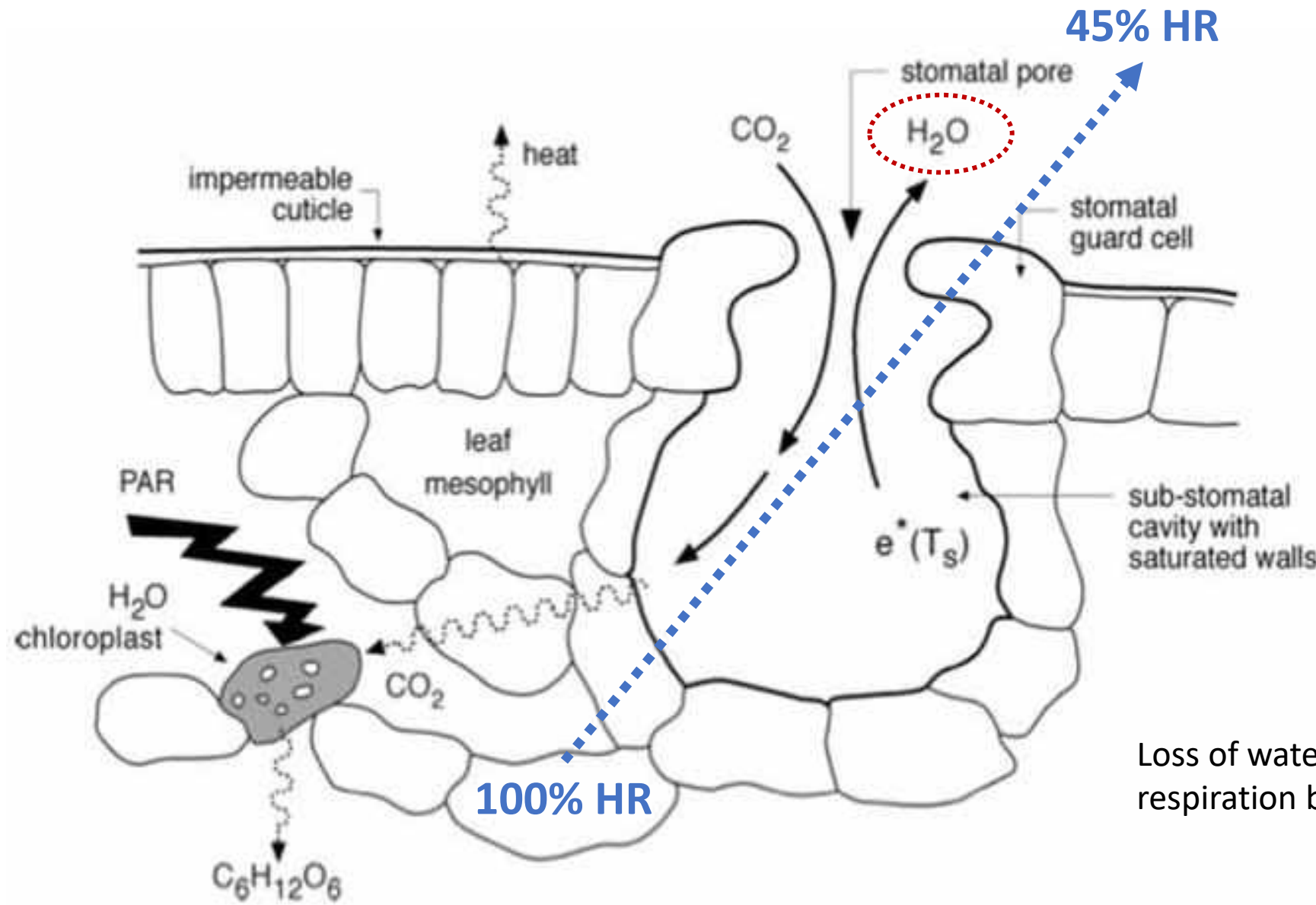


Dry stem





Fundamental dilemma in plants



The biochemistry of plant tissue requires a highly hydrated medium (turgor), but the atmosphere that provides CO₂ and light (respiration process that causes water loss is biochemical but not very relevant), is drier, so plants release water to the surrounding atmosphere, this is the process with the greatest impact is due to the **VPD** (Vapor Pressure Deficit) between the tissue and the surrounding environment.

Loss of water is caused by transpiration and respiration but for the last one is less relevant



“The beginning”

Reviewing the basic of farming, basic for a good fruit.



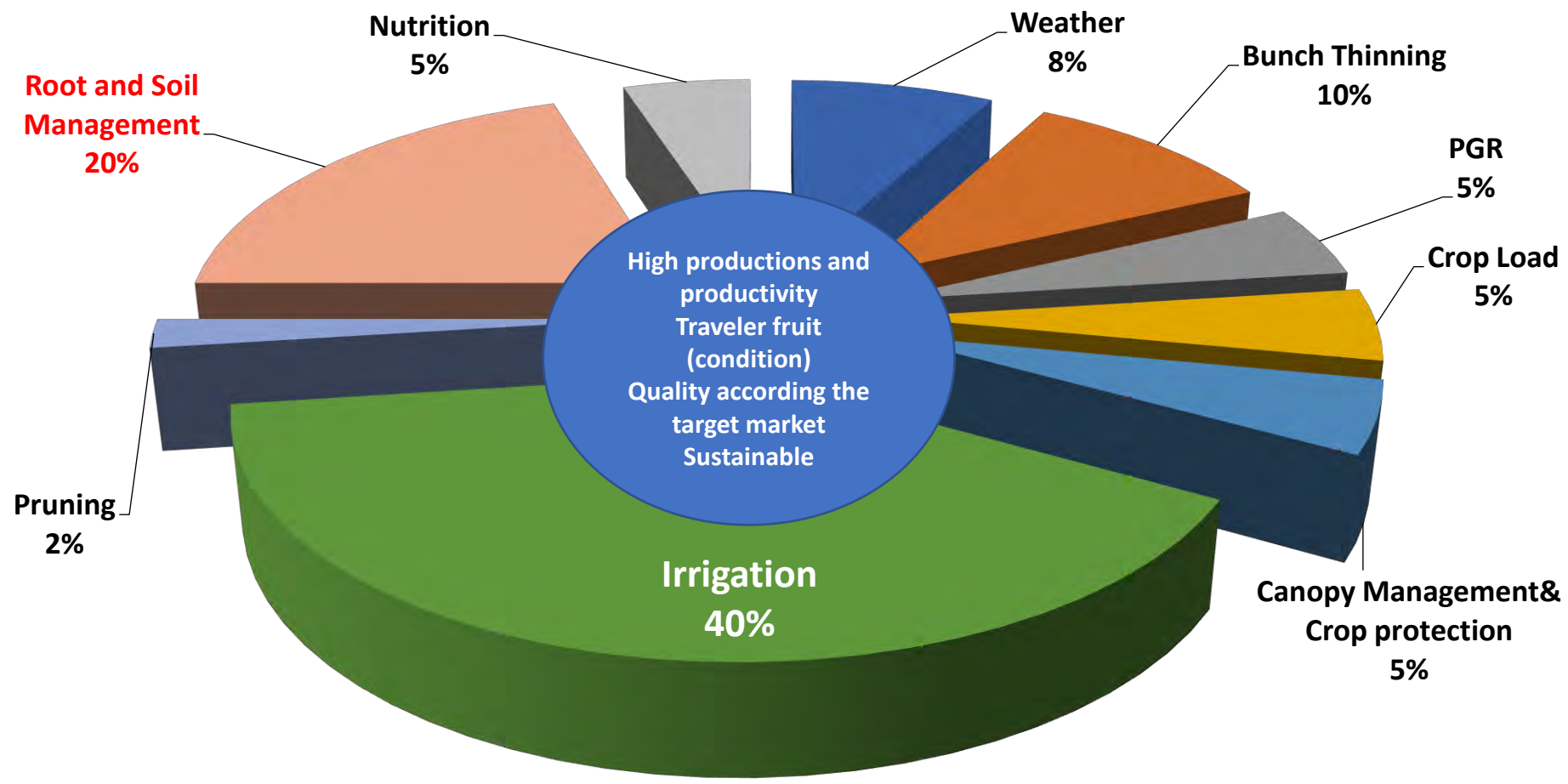
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Agronomic Impact of some Techniques in a well manage Export Table Grape production unit



Source: Modified from D. Lujbetic et al 2004



Impact or share between field production and Post harvest in successful arrivals of Table Grape



50% Field Production



50% Pre & Post harvest





Destroy the paradigm





Destroy the paradigm



Caral, Peru Autumnns Crisp












The hard decisions
CA April 2024



New production areas

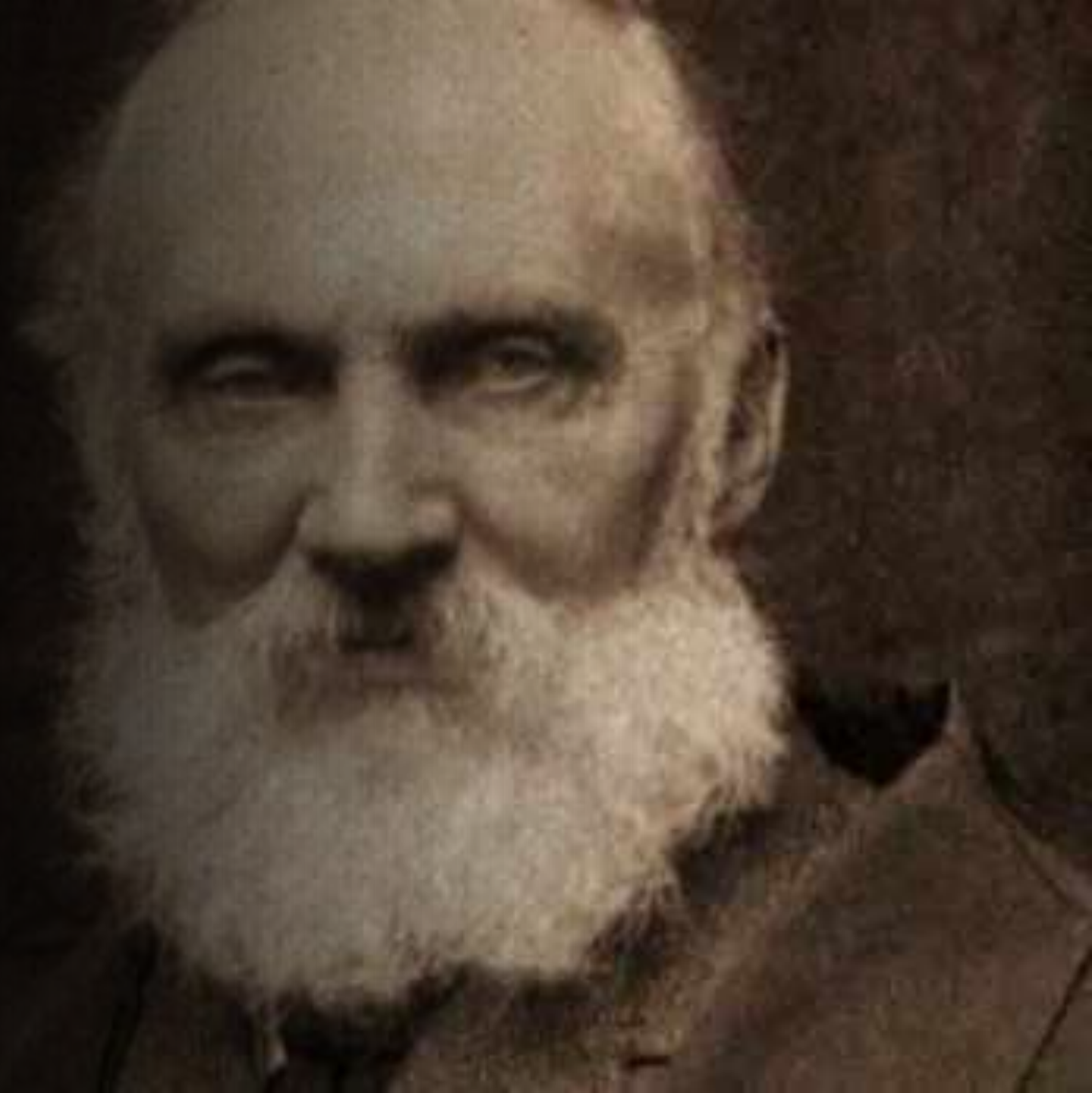


Harvest Nov 2010 Cauca Valley - Colombia



“What is not defined
cannot be measured.
What is not measured
cannot be improved.
What is not improved
is always degraded.”

William Thompson 1st Baron Kelvin
1824 - 1907





Understanding the New incomers





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'A grape idea'

China





20% or more of
Chinese production
(Xinjiang).
Timing September
till November, store
till late January-
February sometime



5% to 10% (Hebei,
Shandong, Yunnan,
Henan, Shaanxi,
Liaoning)

Double pruning



Table grape production in China, supply and distribution

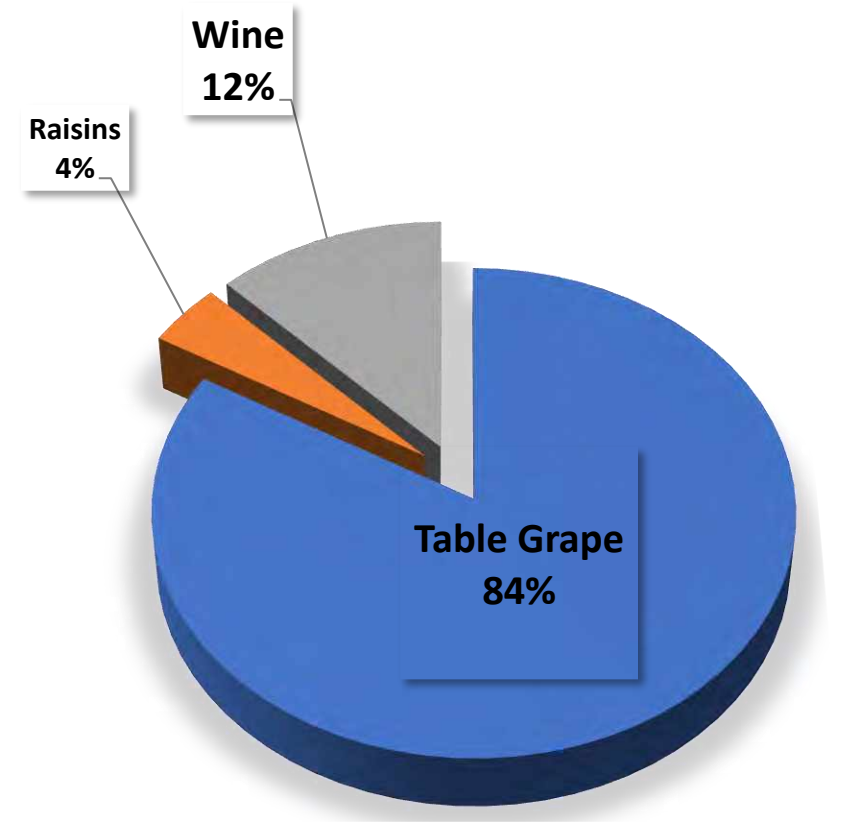
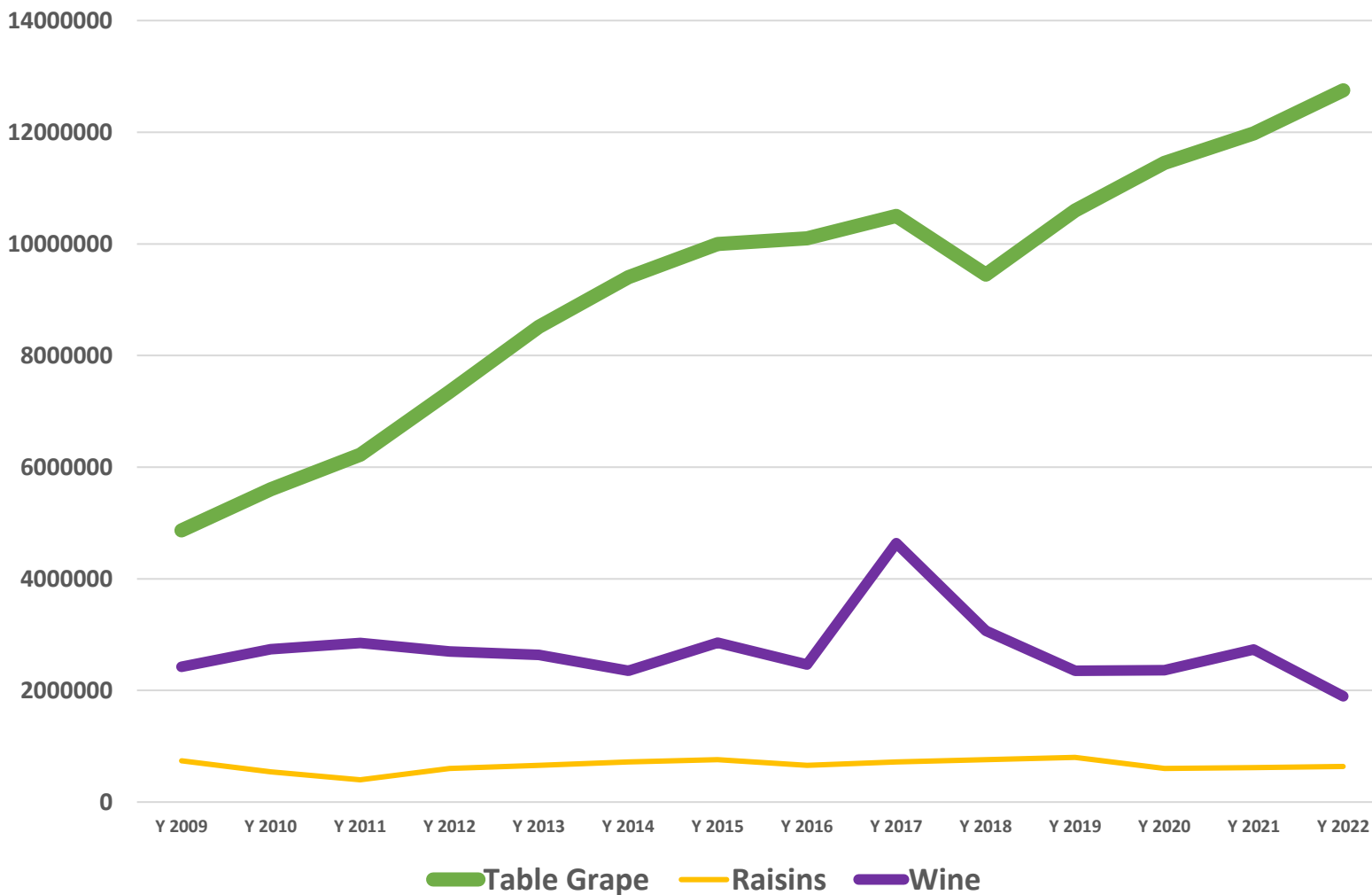
Fresh Table Grape	2020/21		2021/22		2022/23		2023/24	
	June 2020		June 2021		June 2022		June 2023	
China	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area planted (Ha)	728.000	728.000	733.000	733.000	730.000	733.000	0	728.000
Area harvested (Ha)	0	0	0	0	0	0	0	0
Comercial production (MT)	10.900.000	11.450.000	11.200.000	11.980.000	12.600.000	12.750.000	0	13.500.000
Non Comercial production (MT)	0	0	0	0	0	0	0	0
Production (MT)	10.900.000	11.450.000	112.000.000	11.980.000	126.000.000	1275.000.000	0	135.000.000
Imports (MT)	193.800	193.800	185.000	181.000	180.000	175.00	0	12.0000
Total supply (MT)	11.093.800	11.643.800	11.385.000	12.161.000	12.780.000	12.925.000	0	13.620.000
Fresh Dom. Consumption (MT)	10.665.400	11.215.000	11.035.000	11.810.200	12.390.000	12.535.000	0	13.140.000
Exports (MT)	428.400	428.000	350.000	350.800	390.000	390.000	0	480.000
Withdraw from the Market (MT)	0	0	0	0	0	0	0	0
Total distribution (MT)	11.093.800	11.643.800	11.385.000	12.161.000	12.780.000	12.925.000	0	13.620.000

Area: hectare (HA), metric ton (MT)



Table Grape, Wine and Raisins, China

2009 to 2022



Share by 2022 of Table Grape, Wine and Raisins China

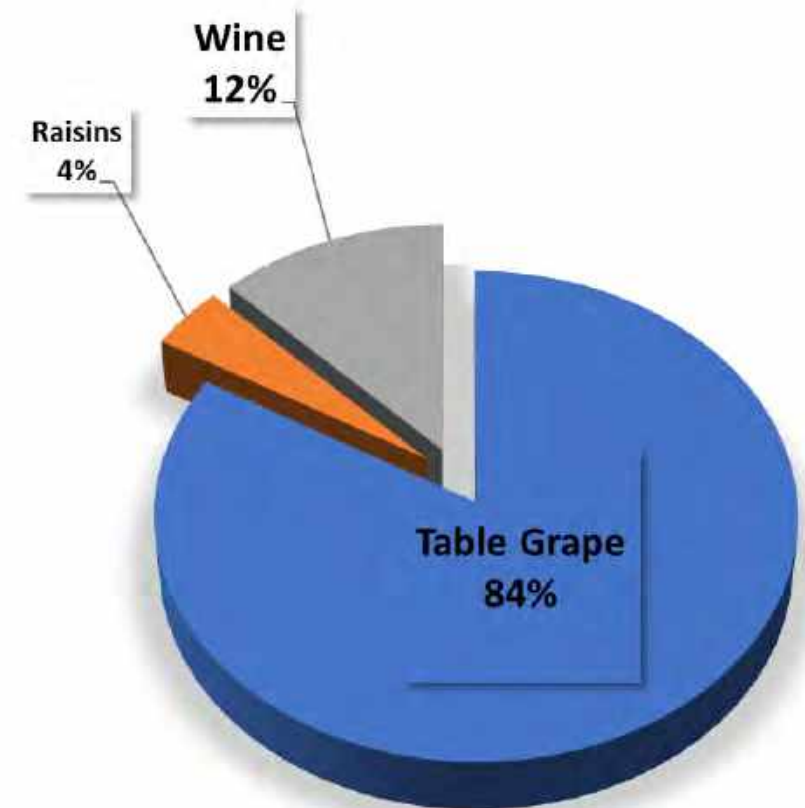
Source: M. A. Giaciniti, own compilation, personal communication 2024



Grape Production in Metric Tone by Prefecture China by 2022

Prefectures	Year 2022
Anhui	572.711
Beijing	10.111
Chongqing	132.519
Fujian	244.339
Gansu	267.400
Guangxi	719.974
Guizhou	411.355
Hebei	1.341.485
Heilongjiang	82.120
Henan	904.662
Hubei	323.273
Hunan	277.708
Mongolia	45.836
Jiangsu	623.022
Jiangxi	115.738
Jilin	81.292
Liaoning	807.175
Ningxia	208.650
Shaanxi	890.849

Prefectures	Year 2022
Shandong	12.23.251
Shanghai	39.258
Shanxi	439.712
Sichuan	542.090
Tianjin	60.699
Xinjiang	3.164.786
Yunnan	1.013.197
Zhejiang	736.552
Grape	15.279.764,26





According to data from G. Tocornal (2023) in China there are:
100,000 hectares of Shine Muscat from 2017 to date
1,400,000,000 physical boxes or packages: a lot of small.

Main goals:

Yunnan and south

Shandong and northeast;

Xinjiang northwest

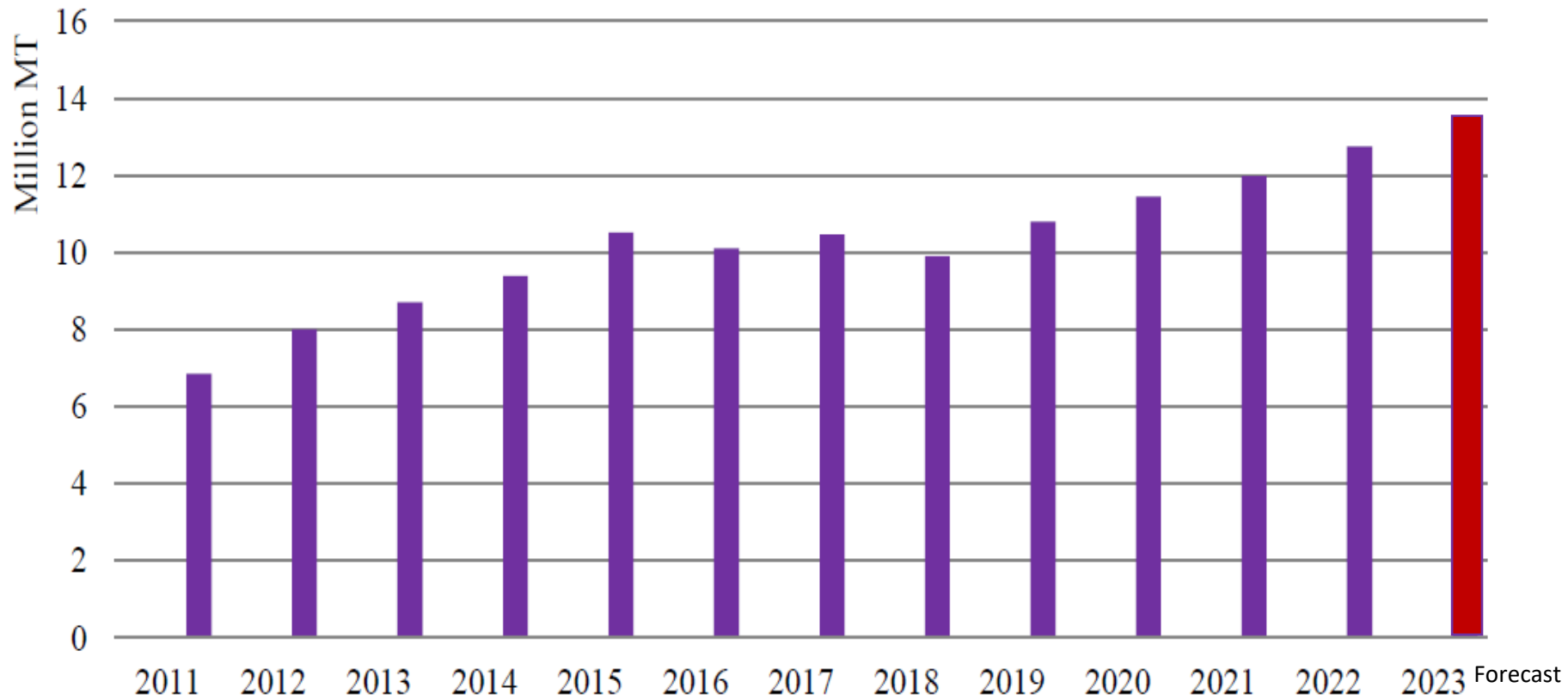
Peru, should keep watching that China produces store grape later and later (Xinjiang- Shaanxi) or double pruning (Yunnan) or to store and sell in January, February sometime even in early March.

In Yunnan, it is harvested in March (mid late) the first harvest from Yunnan, which will be ready and under greenhouses is no longer just plastic. In China, the Piura grape arrives together with Chilean cherries, cherries = slow market for grapes. The Shine Muscat lasts 3 to 3.5 months and the cold storage technology are getting better.

China will have, I don't know if in volume of grapes for the 12 months just like Brazil and Australia.

What is the difference with Peru.....its local market.

O. Salgado 2023



Source: USDA – GAIN Report 2023, based in Chinese Statistic Yearbook 2022

China production is projected up 750,000 tons to 13.5 million on good growing conditions and improved production practices. Investments in crop protection, plant breeding, cultivation, and storage technology is enhancing fruit quality but also extending the supply season and enabling production in nearly all the provinces. Exports are forecast to surge by 23 percent to 480,000 tons as higher supplies boost shipments to Asia markets, especially Indonesia and Vietnam. Imports are forecast to decline for the fifth straight year, plunging over 25 percent to 130,000 tons, as greater volumes of good quality domestic supplies further erode import demand.

Source: USDA (United States Department of Agriculture) Foreign Agricultural Service, December 2023

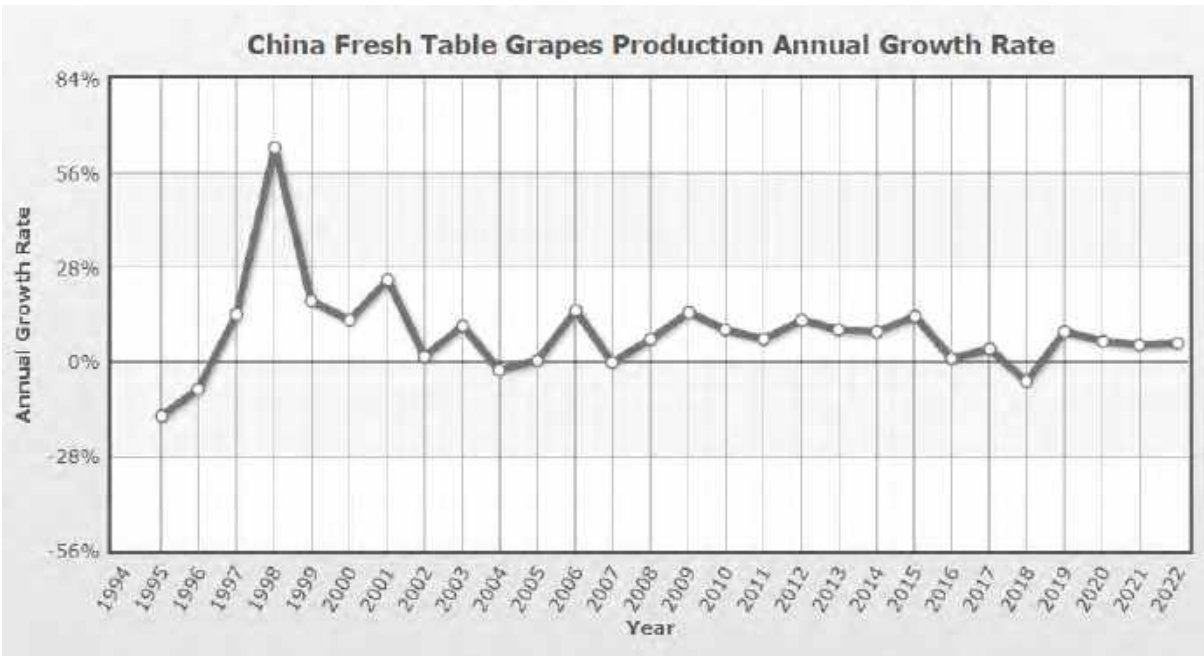
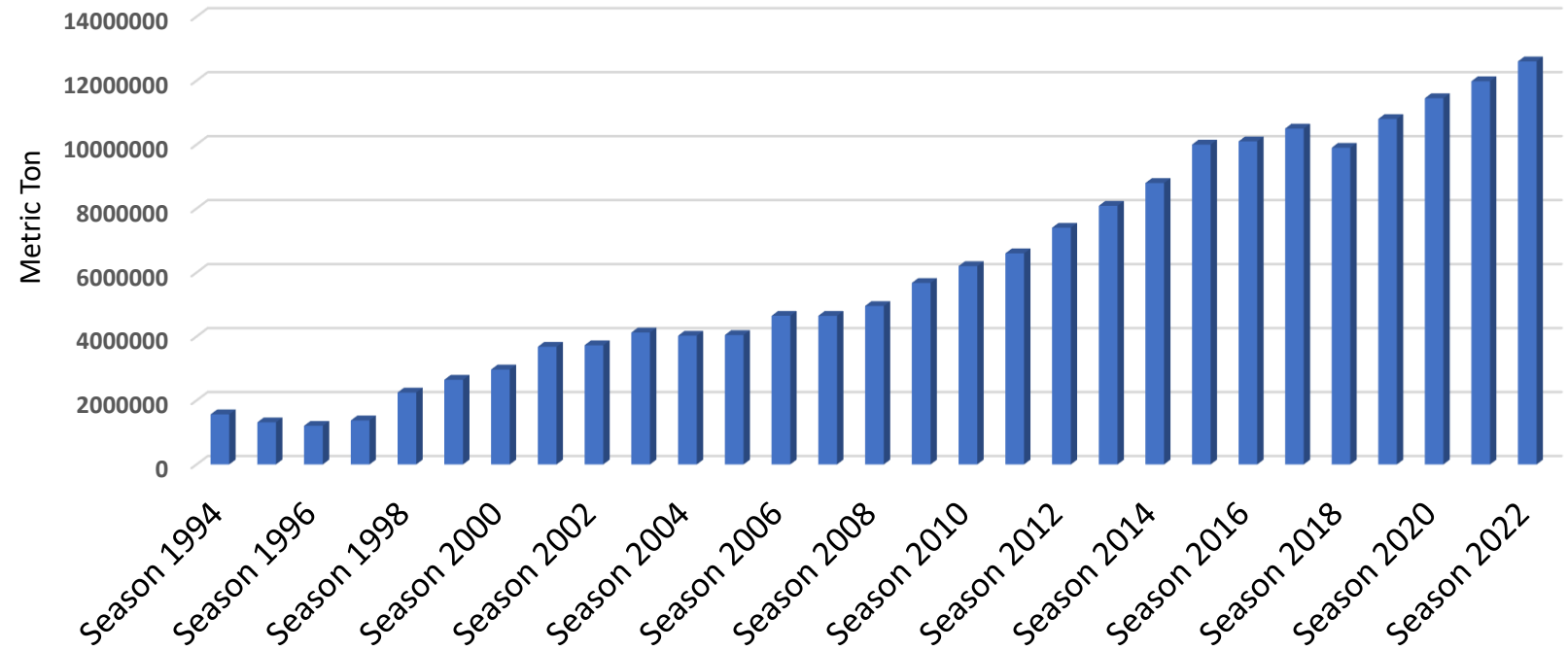
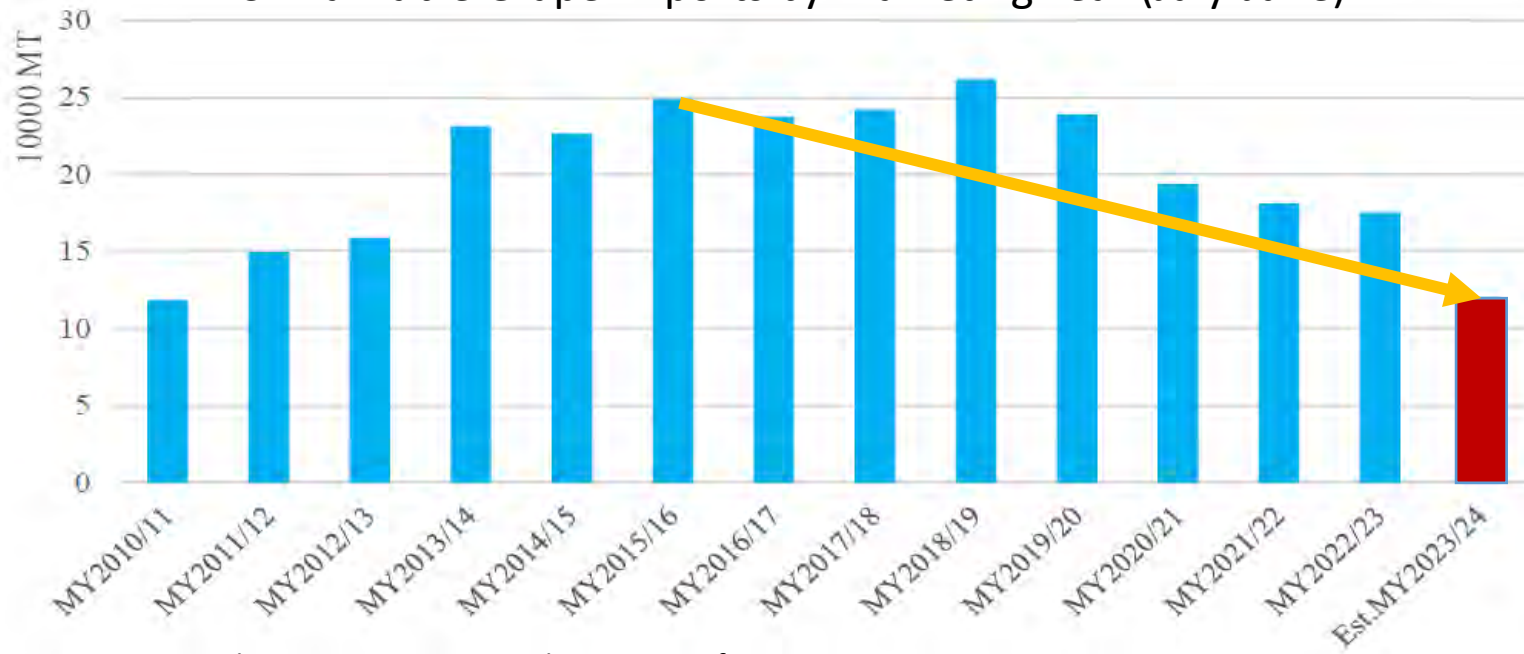


Table grapes produced in China



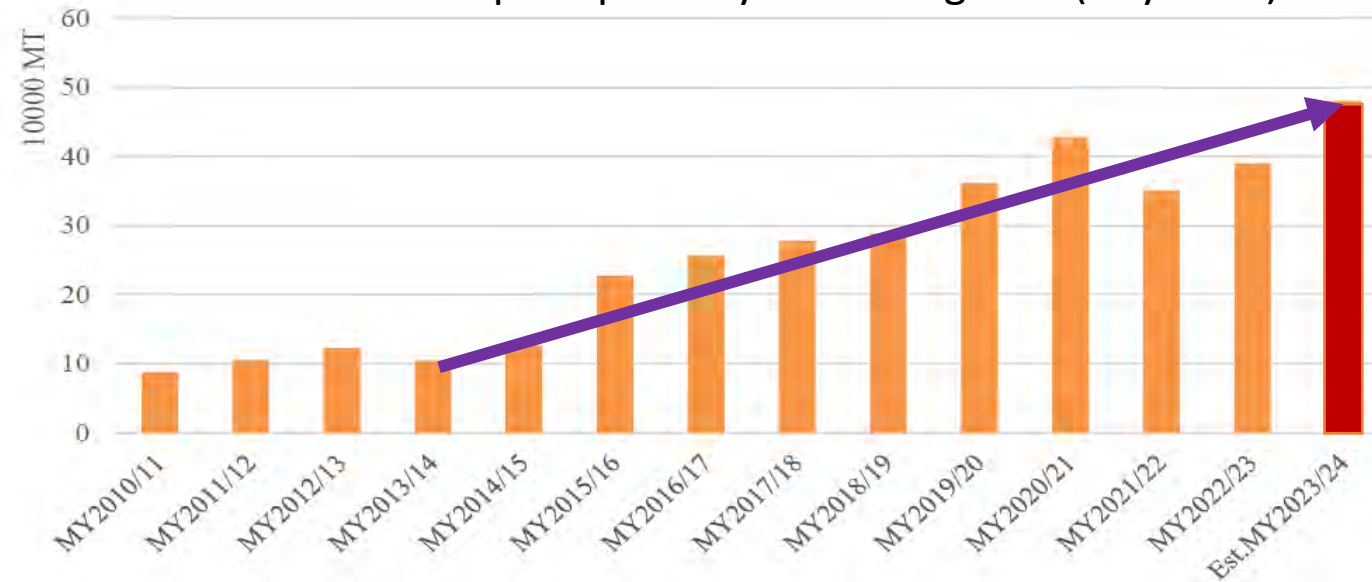


China: Table Grape Imports by Marketing Year (July-June)



Source: Trade Data Monitor, LLC and FAS Beijing, from USDA – GAIN Report 2023

China: Table Grape Exports by Marketing Year (July-June)

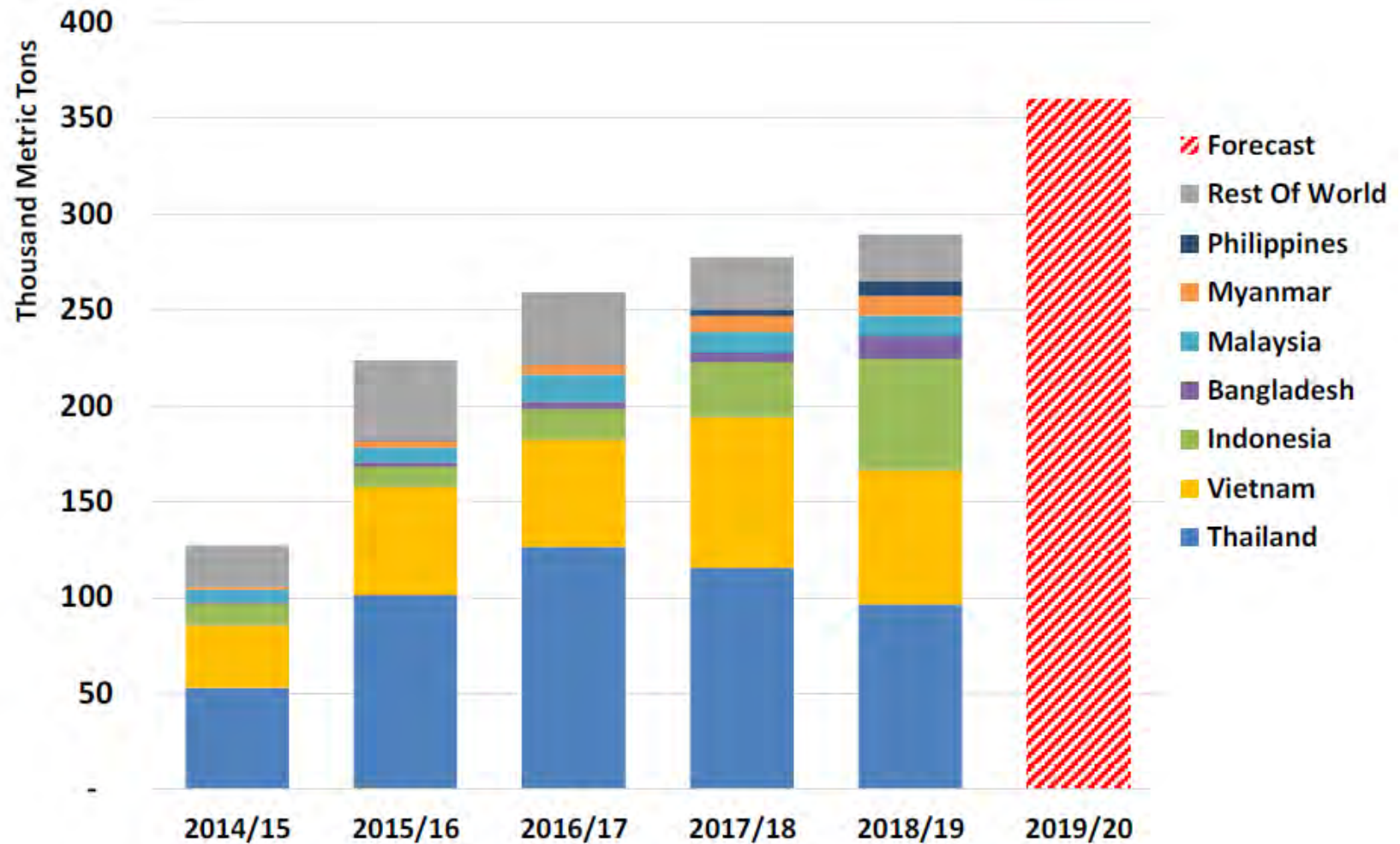


Source: Trade Data Monitor, LLC and FAS Beijing from USDA – GAIN Report 2023





China Table Grape Exports: Continued Growth in Asia



Source: USDA Foreign Agricultural Service June 2020



Total production:

1.600.000.000 boxes 8,2 kilos boxes as per USDA forecast 2023

1.500.000.000 boxes 8,2 kilos as per Indexmundi.com

Export:

58.000.000 boxes 8.2 kilos



Shine Muscat, Yunnan
Southwest of China,
picking from late April
to early May.





Retail Price 2 kilos 190
RMB (USD 27,00) in
Shaanxi, 23 January 2024

Pic: O. Salgado 2024





Shaanxi, 23 January 2024



Fruit pack 6th of October 2023, picture 24th January 2024

Pic: O. Salgado



Fruit pack 6th of October 2023, picture 24th January 2024

Pic: O. Salgado





Repacking 24th January 2024

Pic: O. Salgado



Repacking 24th January 2024

Pic: O. Salgado



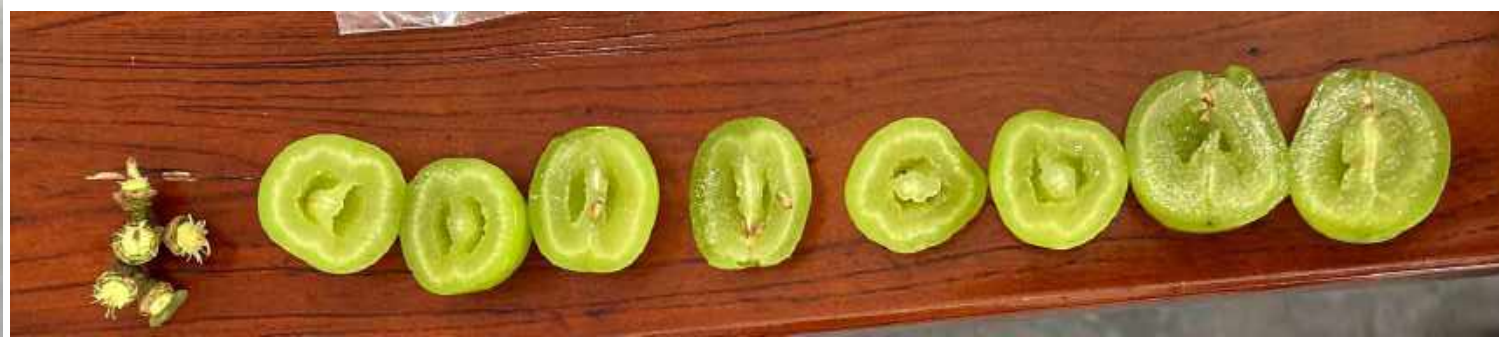
Repacking 24th January 2024

Pic: O. Salgado



Repacking 24th January 2024

Pic: O. Salgado









Shine Muscat Orchard
seems 2 years old, unknow the productivity
January 26th, 2024
O. Salgado 2024



Shine Muscat



Shine Muscat



Plantation: 2,5 m between roads, plants at 1,5 m, 2 to 3 buds per spurs (Piton/Espuela/Brocada) and 14 to 16 outlet with 1 to 1,2 spurs each (January 26th, 2024)







Xinjiang







Cold storage in China:
Reality









Chinese Crimson 24th of
January, Australian Clone?
Stored in China



Shine Muscat
24th January 2024



Street stores outside of one of the main Local Wholesale Markets



Picture: O. Salgado 22 January 2024



Street stores outside of one of the main Local Wholesale Markets



Class 2



Class 1



650 RMB / box



Picture: A. Hoffmann September 2019



May 5th, 2020

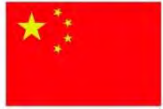




Asking
Price:150 RMB
Variety: Shine
Muscat
Weight:2.5Kg
Grade:1

Week 8/ 2023





Asking Price:120 RMB
Variety: Shine Muscat
Weight:2.5Kg Grade:1

Week 46/ 2022





G. Tocornal Santa Elena 2023





Fruit set for second November harvest























Asking Price: RMB100 Variety: Shine Muscat Weight:
4Kg Grade: 2



Source: JP. Zapico week 12 2024



Asking Price: RMB 110
Variety: Black Seedless
Weight: 2.75Kg

Source: JP. Zapico week 45 2023









India

**INDIA is the ONLY
NORTH HEMISPHERE
country PRODUCING
AND EXPORTING
GRAPES like SOUTH
HEMISPHERE countries**

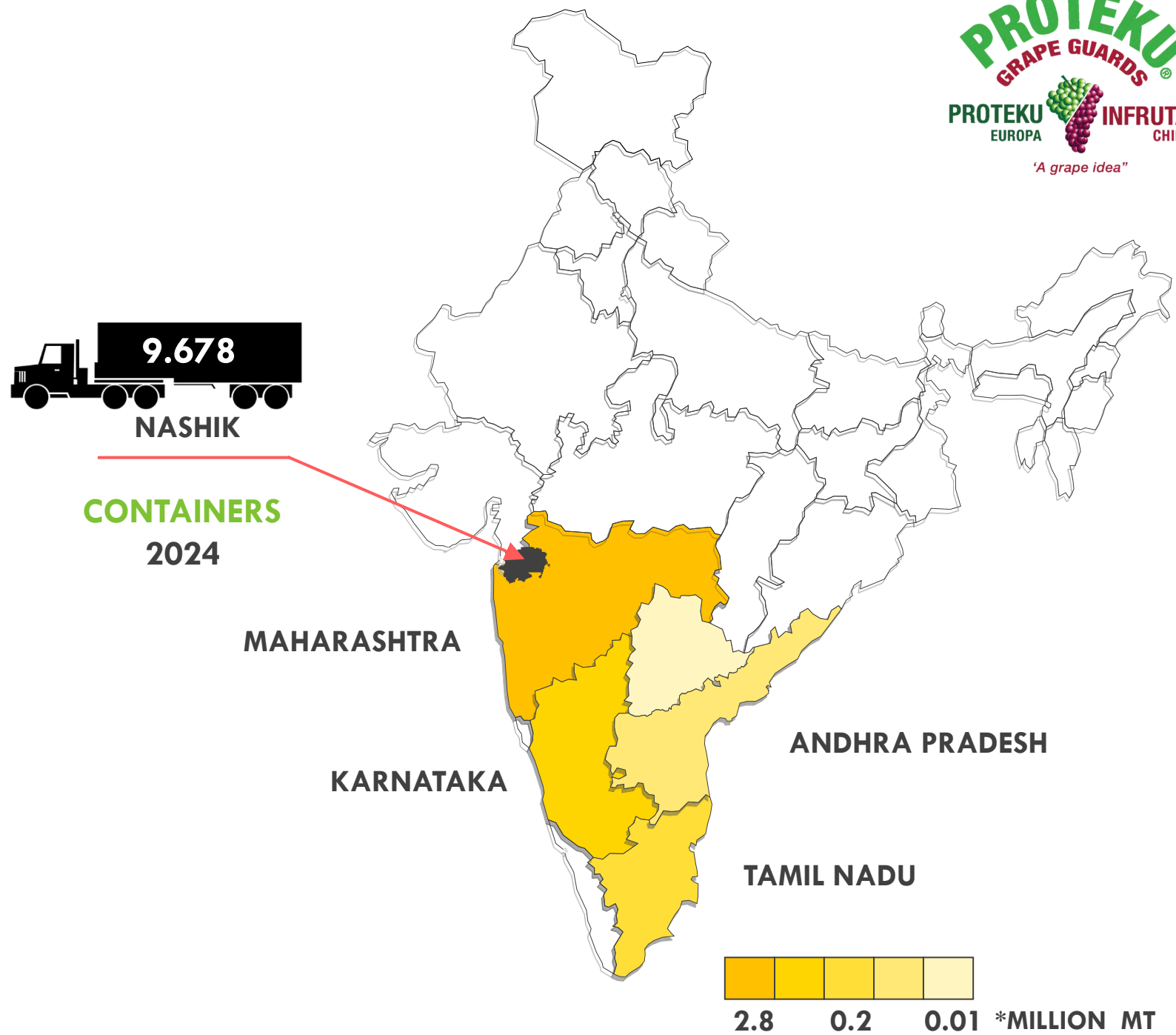


'A grape idea'



India

Grape production in India is continuing its development, to supply growing world demand. The industry has set itself some ambitious objectives, hoping to triple its production by 2050. So, surface areas have seen a big rise over the past twenty years, though it is above all improved cropping techniques which are currently enabling better productivity and access to the international markets. While this origin is highly competitive, its development was curbed in the early 2010s by phytosanitary constraints, forcing the authorities to implement strict protocols and encourage producer training.





India India: Commodity, Grapes, Fresh, Production, Supply and Distribution

(Area in Hectares, Quantity in Metric Tons, and Trees in Thousands)

Fresh Table Grape	2020/21		2021/22		2022/23	
	June 2020		June 2021		June 2022	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area planted	140.000	140.000	142.000	142.000	0	142.000
Area harvested	130.000	130.000	140.000	140.000	0	141.000
Comercial production (MT)	230.000	230.000	290.000	290.000	0	285.000
Non Comercial production (MT)	0	0	0	0	0	0
Production (MT)	230.000	230.000	290.000	290.000	0	285.000
Imports (MT)	6.600	6.600	8.000	8.000	0	9.000
Total supply (MT)	2.306.600	2.306.600	2.908.000	2.90.000	0	2.859.000
Fresh Dom. Consumption (MT)	1.830.020	1.830.020	2.305.000	2.285.000	0	2.270.000
Exports (MT)	267.200	267.200	255.000	275.000	0	270.000
Withdraw from the Market (MT)	209.380	209.380	348.000	348.000	0	319.000
Total distribution (MT)	2.306.600	2.306.600	2.908.000	2.908.000	0	2.859.000

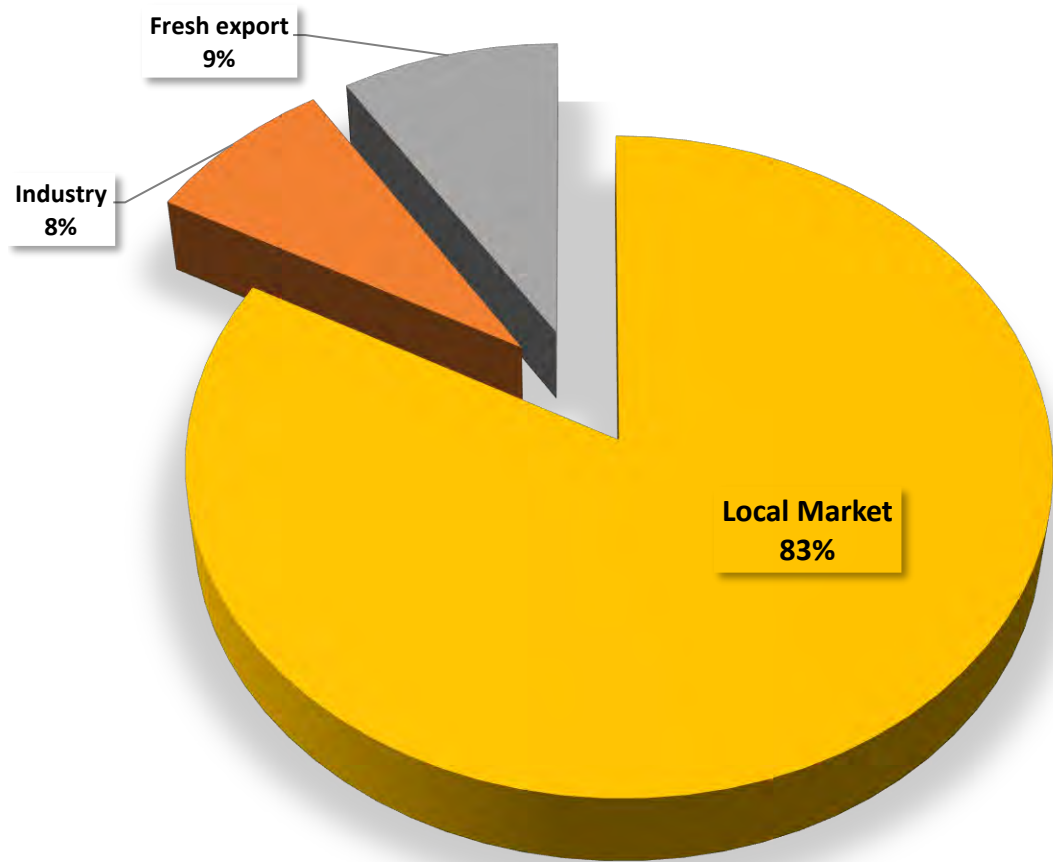
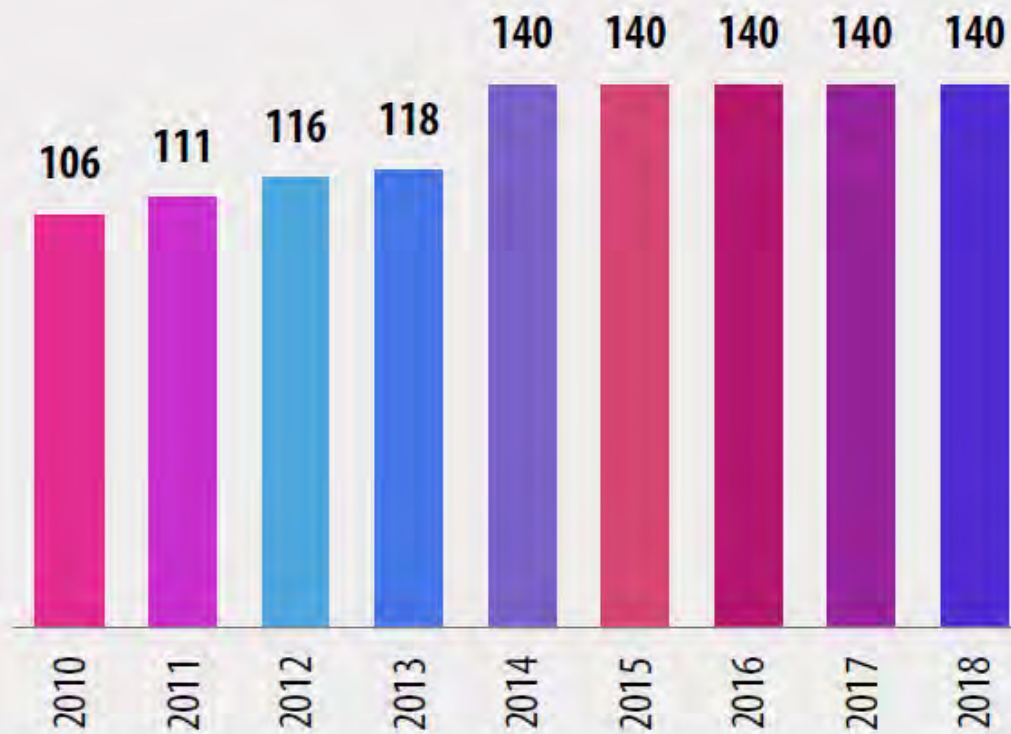


Table grape - India - Evolution of planted areas

(in 000 hectares / sources: FAO, USDA)





Date : 20/04/2024

MIS Report - 2023-2024

Summary of registered plots

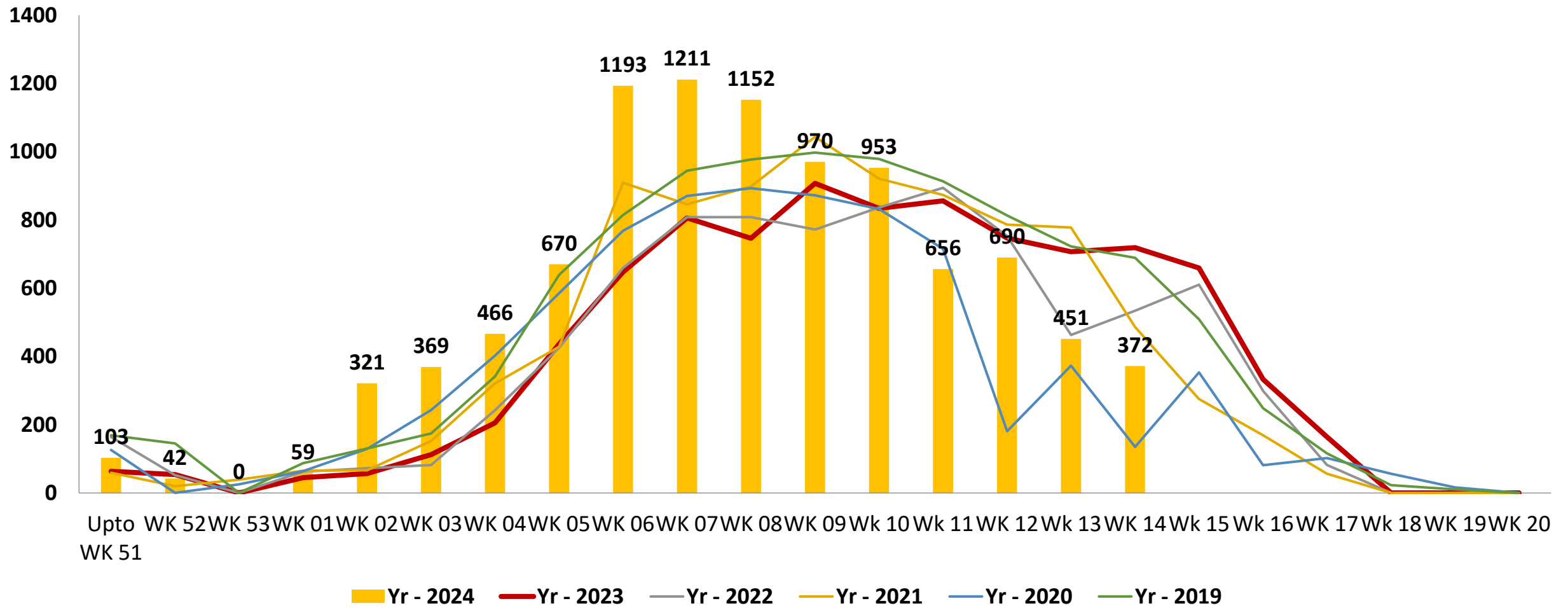
State	Renewed	New	Total
Maharashtra	37850	6430	44280
Karnataka	9	2	11
Andhra Pradesh	0	2	2
Total	37859	6434	44293

44.294 Plots almost each plot one growers and average 1 to 1,5 ha



All markets Week wise Shipment up to week - 14

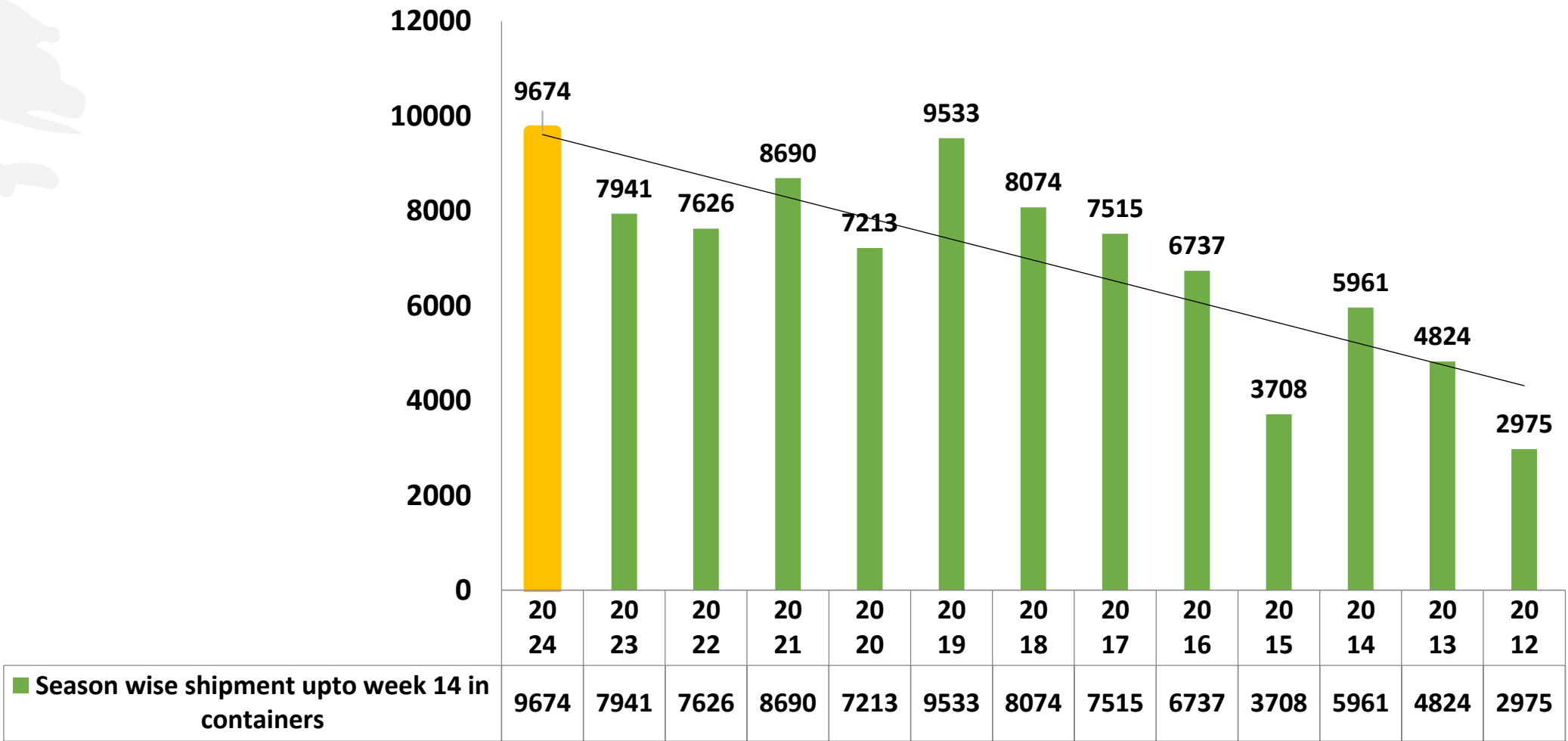
Total containers = 9678 (22 to 23 million 8,2 kilo cases)



Source: SEASZON International from Shipping Line 2024

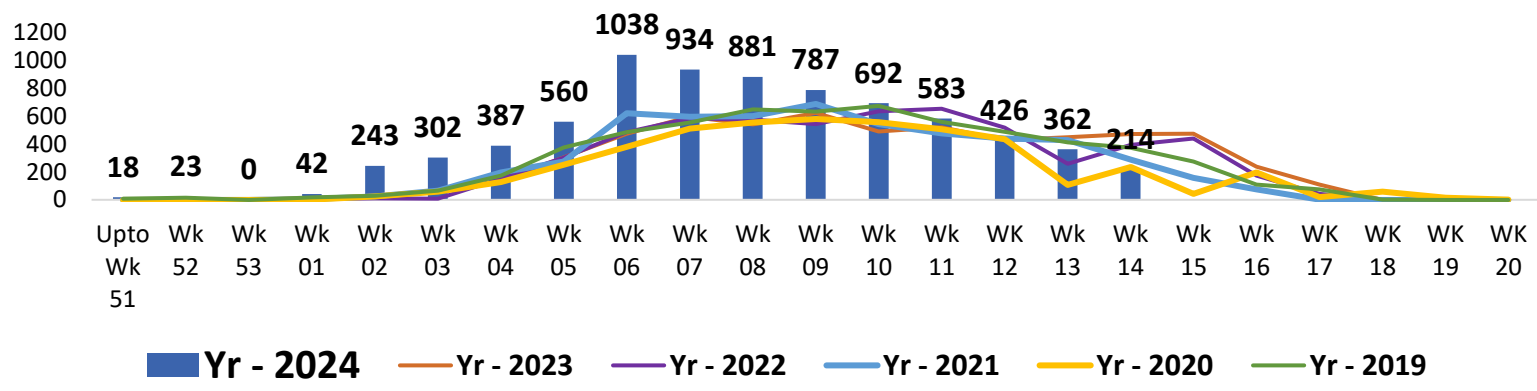


Indian Season wise shipment up to week 14

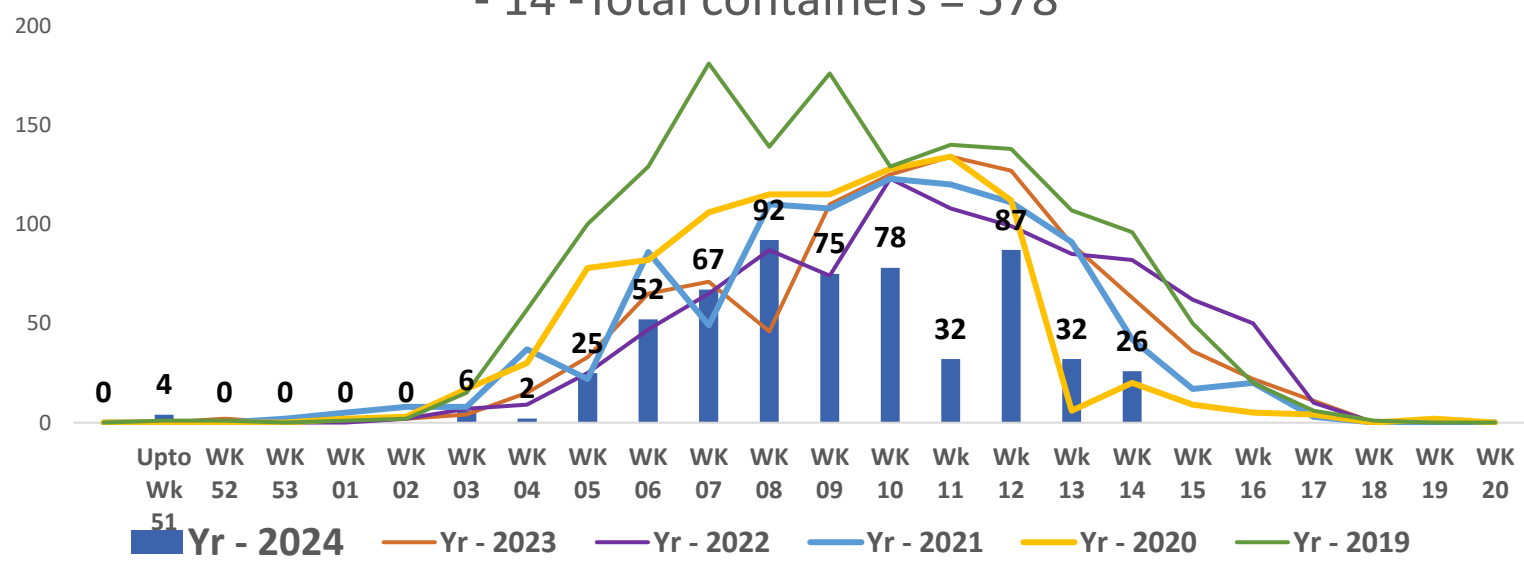




Rotterdam Week wise Shipment to Rotterdam up to week - 14 -Total containers = 7492

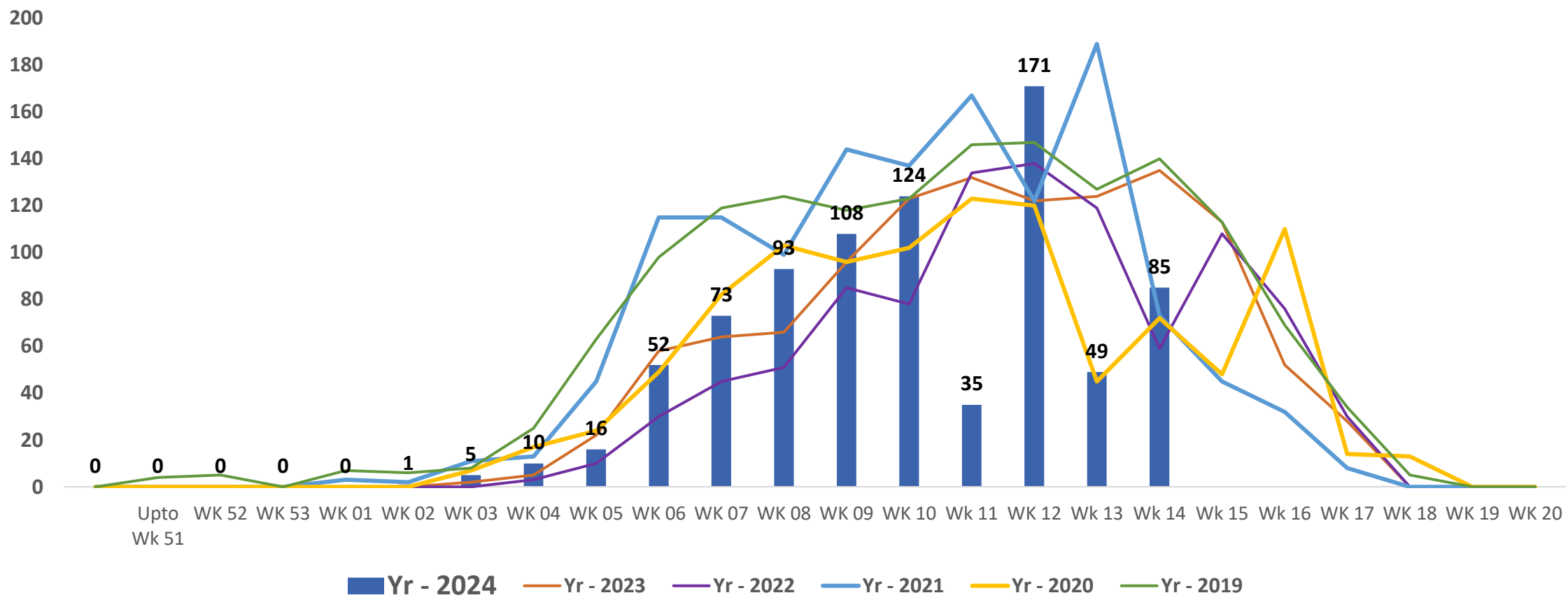


Rest of EU Week wise Shipment to Rest of EU up to week - 14 -Total containers = 578



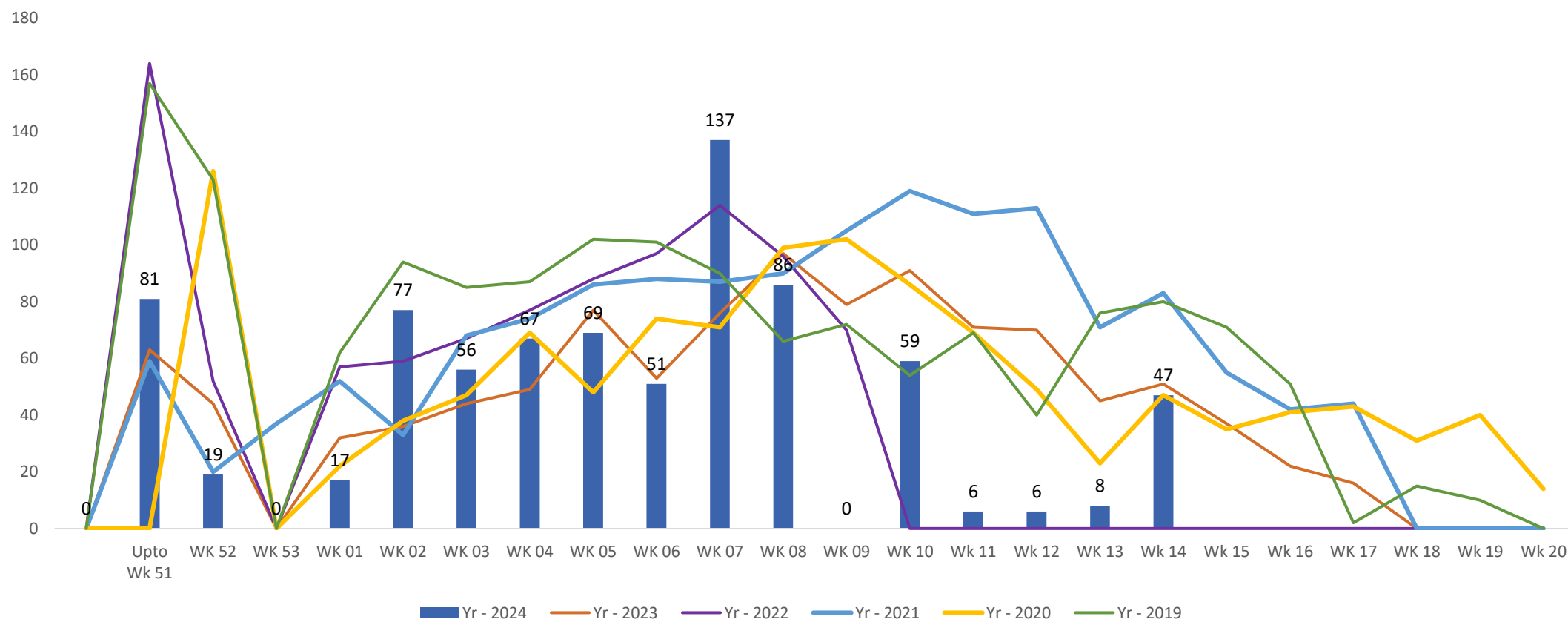


UK Week wise Shipment to UK up to week 14 -Total containers = 822





Russia Week wise Shipment to Russia up to week 14 -Total containers = 786





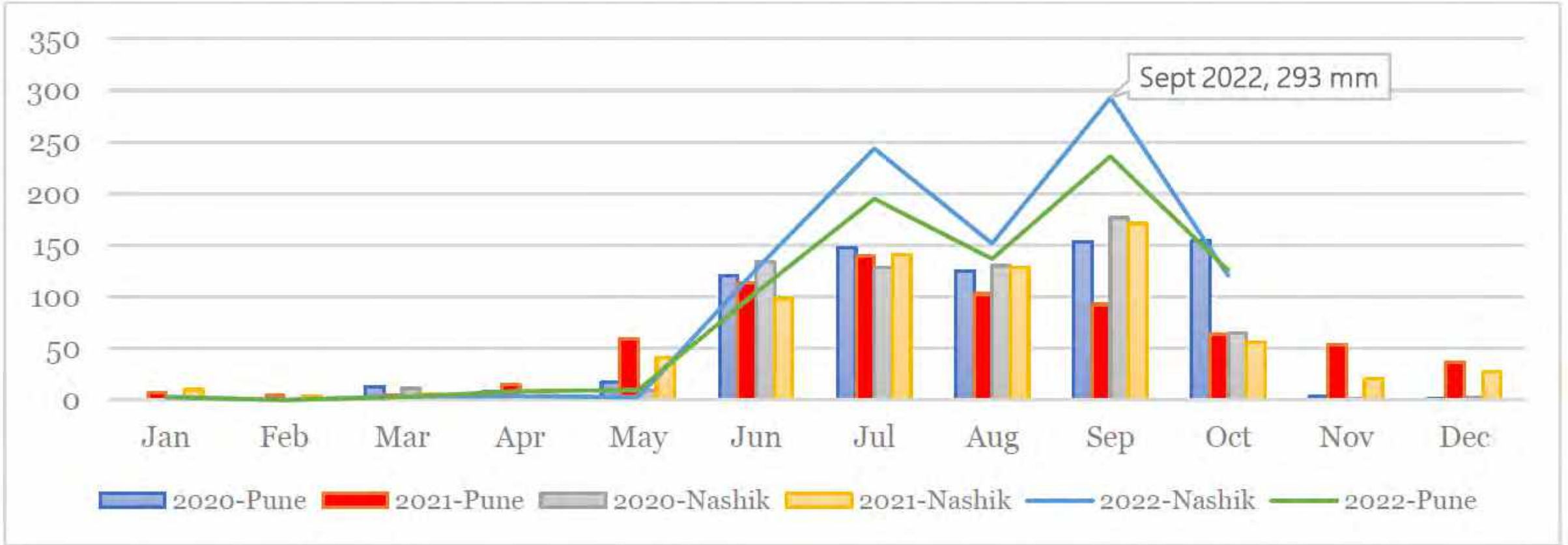
EU & Russia country wise shipment up to week 14

(Source: SEASZON International from Shipping Line)





Calendar Year 2020-2022 Monthly Precipitation (Millimeters) – Nashik and Pune Districts, Maharashtra, India



Notes: Nashik and Pune are among the major table grape growing regions in Maharashtra. This satellite-derived weather data is from the U.S. Air Force (USAF) 557th Weather Wing.
Source: USDA Global Agricultural and Disaster Assessment System ([GADAS](#)).



WORLD GRAPE AVAILABILITY



COUNTRY	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	COUNT (IN MONTHS)
INDIA													9
USA													9
CHILE													7
PERU													7
ITALY													7
BRAZIL													6
SOUTH AFRICA													6
SPAIN													5
MEXICO													4
EGYPT													3



END OF HARVEST

NOT USED AS AN EXPORT WINDOW



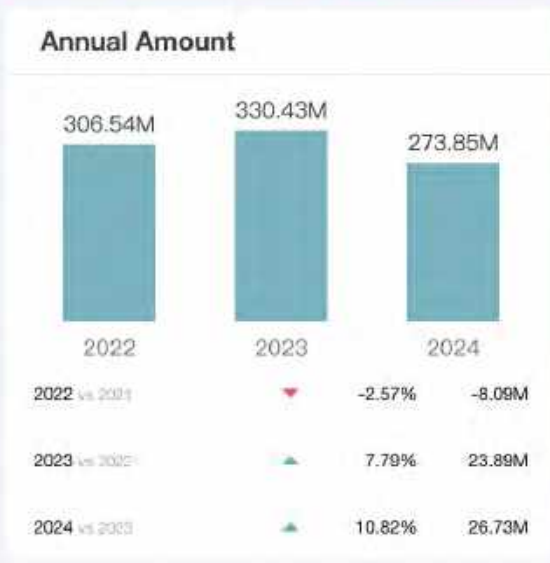
Asking Price:110 Variety:
White Seedless (ZonaKa)
Weight:4Kg Grade:1

Week 8/ 2023





910.83M AMOUNT 589.96M QUANTITY 78K TIMES 2650 #IMPORTER 749 #EXPORTER



Top10 Exporters

Company	Amount (M)	Percentage (%)
SAHYADRI FARMS P...	87.05M	7.38%
EURO FRUITS PVT L...	46.02M	5.05%
IFC OVERSEAS	44.82M	4.92%
MAHINDRA AGRI SOL...	32.74M	3.59%
FRESHTROP FRUITS L...	30.25M	3.32%
INDYGLOBAL VENTU...	29.77M	3.27%
PC FOODS PRIVATE L...	29.29M	3.22%
BOMBAY FRUITS & V...	23.82M	2.62%
MAGNUS FARM FRES...	23.12M	2.54%
SAHYADRI FARMERS...	22.86M	2.51%

Top10 Importers

Company	Amount (M)	Percentage (%)
OGL FOOD TRADE L...	31.5M	3.46%
SAHYADRI FARMS B.V.	26.6M	2.92%
EDEKA EINKAUFSCO...	22.17M	2.43%
DAISY FRUIT TRADIN...	21.83M	2.4%
ORIGIN FRUIT DIREC...	20.74M	2.28%
ANTON DURBECK G...	16.17M	1.77%
GLOBAL FRUIT POINT...	15.49M	1.7%
TIMERFRUIT B.V.	14.27M	1.57%
DOLE EUROPE GMBH	13.06M	1.43%
UNISEL CO SIA	12.69M	1.39%





Table Grape Imports, MY 2019/20-2021/22 (MT)

Country	2019/20	2020/21	2021/22	Change %
<i>World</i>	7,341	6,589	7,915	20
China	4,832	4,305	5547	29
Afghanistan	679	949	1,521	60
Chile	302	283	512	81
Italy	120	18	81	359



Indian grape

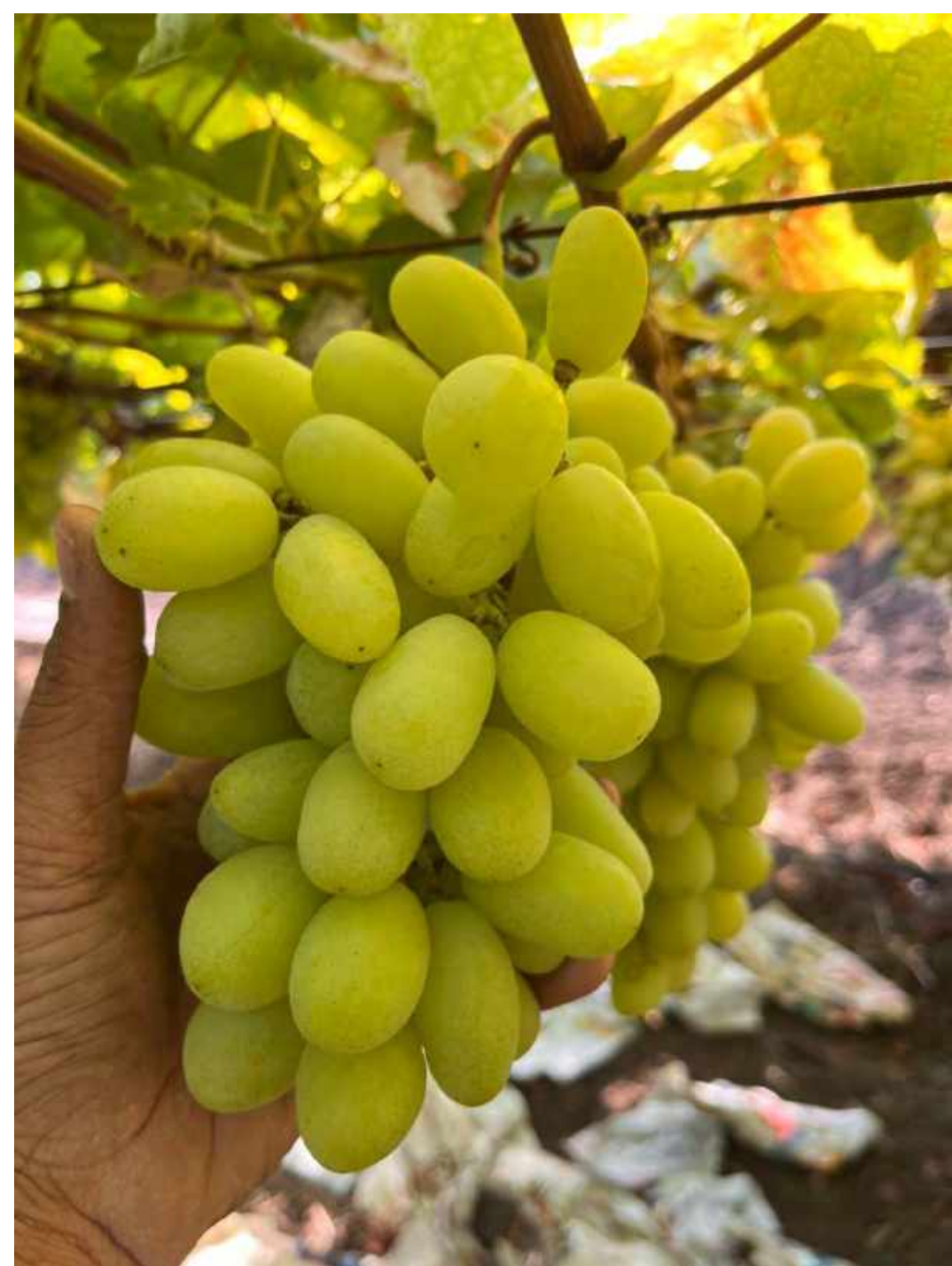
Variety - Thompson

Grower - Bhushan Deshmukh

Location- Vani, Nashik

Season 2024

Source: Akash Kiran Patil 2024





Source: Akash Kiran Patil 2024



Variety - Sharad
Grower - Prabhakar More
Location - Pimpalgaon,
Nashik
Season 2024





Source: Akash Kiran Patil 2024



Variety- Ganesh
Grower - Ganesh
(Bubloo) More
Location - Vani,
Nashik
Season 2024





Source: Akash Kiran Patil 2024



Variety – Jumbo
Grower - Vikram More Location -
Pimpalgaon,
Nashik
Season 2024











“The new Indian Deal”

Source:

P. Moreno SFNL 2024

P. Byani Panacea Indi Global Farms 2024

A. Tambuwala, Sahyadri Farms / Seasons International 2024

PROTEKU
GRAPE GUARDS®



‘A grape idea’



Arra 15,
Production
block at
Sahyadri
Season 2024





Fresh Packhouse
Capacity : 300 MT/per day

6 Packing Lines
No. of Employee : 3000+



Fresh Packhouse
Capacity : 300 MT/per day

6 Packing Lines
No. of Employee : 3000+



Seeding goodness

<https://www.sahyadrifarms.com/about-us/our-story>





Timco, Test Block at Sahyadri Season 204





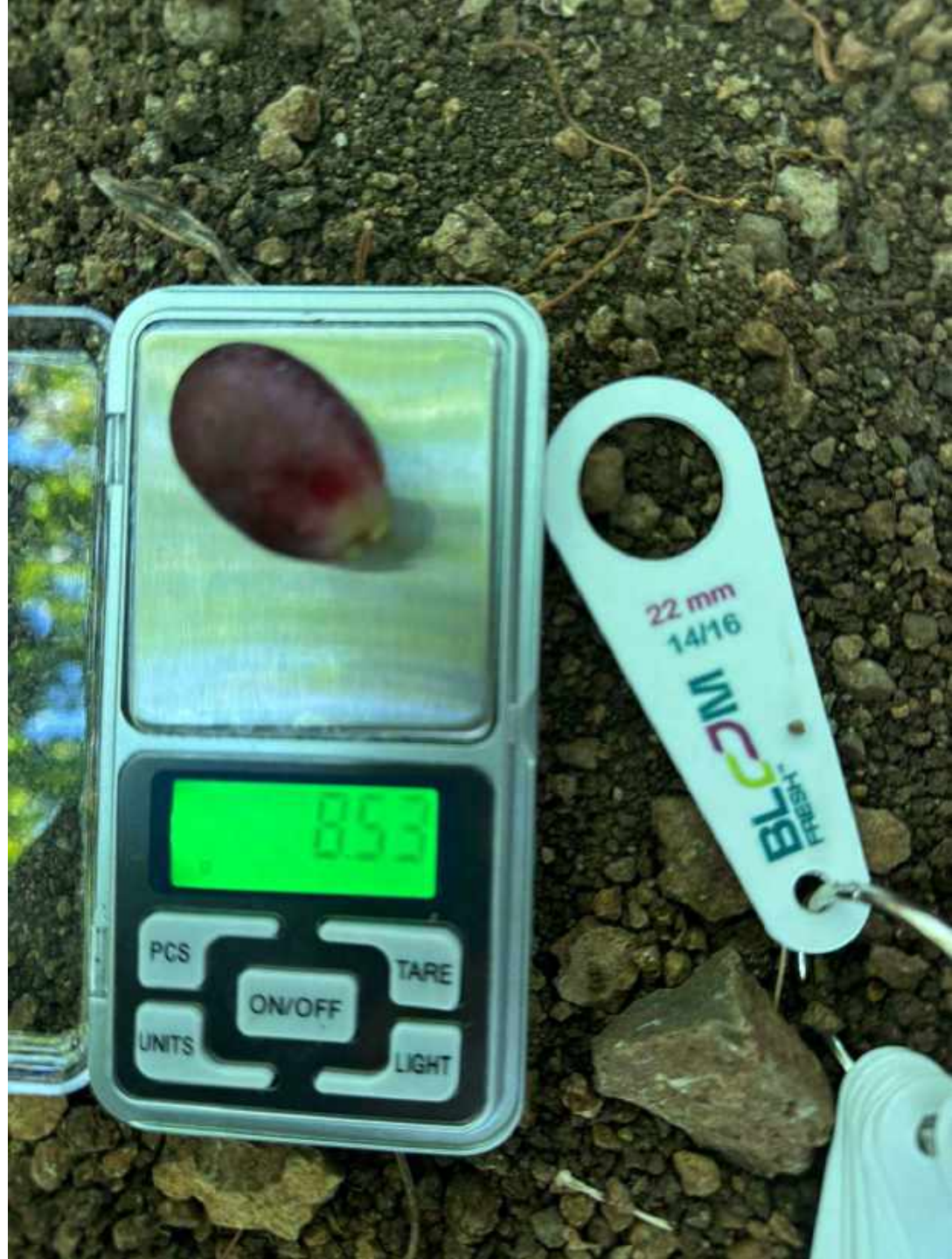


Allison, Test Block
at Sahyadri Season
204





Source: P. Moreno SFNL 2024





Source: P. Moreno SFNL 2024



Source: P. Moreno SFNL 2024





Timson, Test Block at Sahyadri Season 2024





Allison Panacea India
Global Farms
Season 2024
Source: P. Bayani 2024





Bayani farms in Nashik
(Panacea Indiglobal
Exporter)









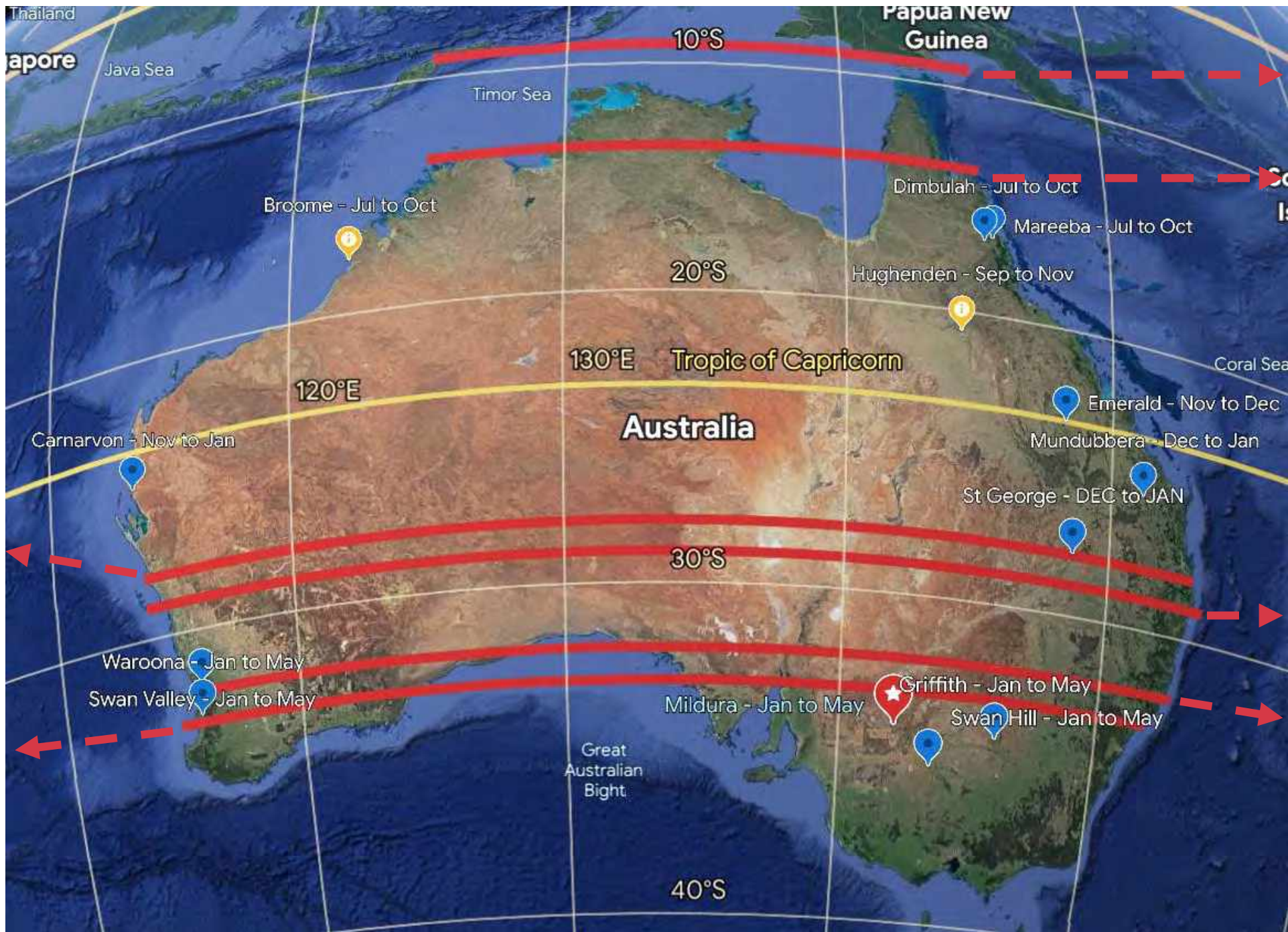
Timco Panacea India Global Farms Season 2024

Source: P. Bayani 2024









**Petrolina -
BRA**

Ica - PER

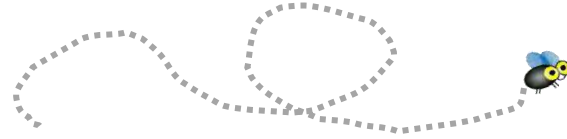
**Orange River -
SA/NAM**

**La Serena -
CHI**

Hex River - SA

**Valle del
Aconcagua
- CHI**





Worried about the competition? It means that the competition beats you, you must know who can be my competition before they are.

Do I want to compete, or do I want to differentiate myself? Do I sell grapes, or do I sell a product?

R&D, how much do I invest in it?

I have the best Quality.....!!!! Well, that argument is from the Stone Age

I have 40 years of experience.....NO, I have one year that I repeated it 39 times!!!

Drama of the Painter his work of art is one and irreproducible, let us be designers and manufacturers (management / continuous improvement)

Active Inertia: Always do the same thing, you may do it excellently.....but.....Kodak, Olivetti, Motorola.....Taxis /UBER Collaborative Economy.....you must reinvent yourself (Donald Sull)

“Blue Ocean Strategy” by Chan Kim and Renee Mauborgne





Don't relax, we all have the right to be in business, but no one is obliged to stay in business, remember our business is changing very quickly and what changes much faster and faster than our business, is the speed of change.

O. Salgado 2016





Thank You

Oscar Coco Salgado



Packaging Materials

CERTIFICATED





*Never ever
give up!!!*



Oscar (Coco) Salgado



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cocosalgado@gmail.com

