

Fall Creek® update 2024



Field + Forum, Meterik 17th July 2024



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Grower Support Representative
Fall Creek® Farm & Nursery | Poland

Agenda

- Fall Creek® – serving growers for more than 45 years
- Commercial platforms and varieties
- Rabobank report – where is the blueberry industry going?
- High Chill Varieties – commercialization platforms
- FC11-164 – the future?
- Mechanisation
- Market insights from Europe – season 2024



Building on a track record of excellence

45+ yrs

Founded In 1978 in the U.S.

40+

varieties



Family-owned,
two generations of
leadership

800+

Permanent employees

9+

Nurseries
(Peru, Chile, Mexico, Spain,
South Africa, Netherlands, USA (3))

3+

Research Development Centers
(United States, Spain, Mexico)

United States

Mexico

South America

EMEA

China





Competitive Varieties Paired with Applied Research

FALL CREEK FARM & NURSERY, INC.

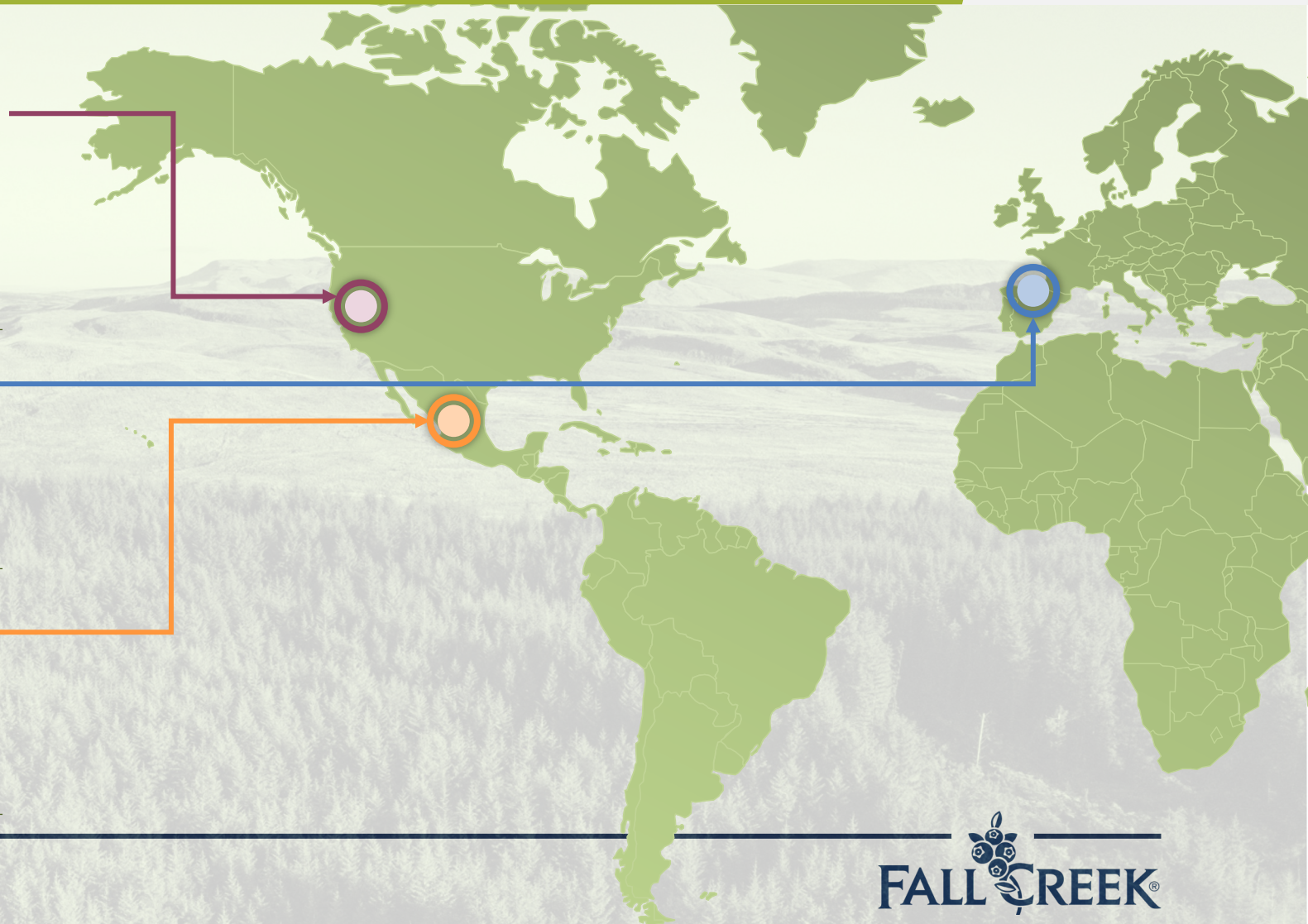
- Founded 1978
- Active Breeding Programme Since 1998
- Focus: High & Mid-Chill Varieties – Oregon + No & Low-Chill - California

FALL CREEK EUROPE

- Established Spain Nursery 2015
- Active Breeding Programme Since 2016
- Develop Low-chill varieties

FALL CREEK MEXICO

- Established 2010
- Active Breeding Programme Since 2006
- Focus: No & Low-Chill Varieties



Rabobank: Blueberry update 2023

Operational efficiency
and premiumisation
will transform the
blueberry industry*

*Rabobank Report – Blueberry Update 2023



Efficiency

- New and better varieties – more kg/ha
- Going from 3300 plants/ha to 4000 – 5000 plants/ha
- More effective picking – new genetics with bigger fruit and more condensed ripening, mechanisation
- Increasing yield in first years after planting – vigorous varieties giving crop very fast



Premiumisation

- Tasty, crunchy and flavourfull fruit in different market positions
- Better eating experience
- Increasing standard diameter in Europe
- New genetics across the globe setting trends also for High Chill areas

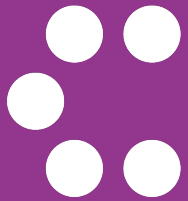


Rabobank Blueberry update 2023

- *"margin pressures will continue to prompt the industry to improve efficiency and productivity, including **variety** upgrades"*
- *"The industry has raised the bar in terms of **fruit quality**. This will be a critical aspect in fostering further consumption growth"*
- *"Adoption of **new technology** and **varieties** will be key to providing blueberries that will satisfy consumers globally"*



COMMERCIALIZATION PLATFORMS



FALL CREEK™
COLLECTION



OPEN
CATALOGUE



SEKOYA.



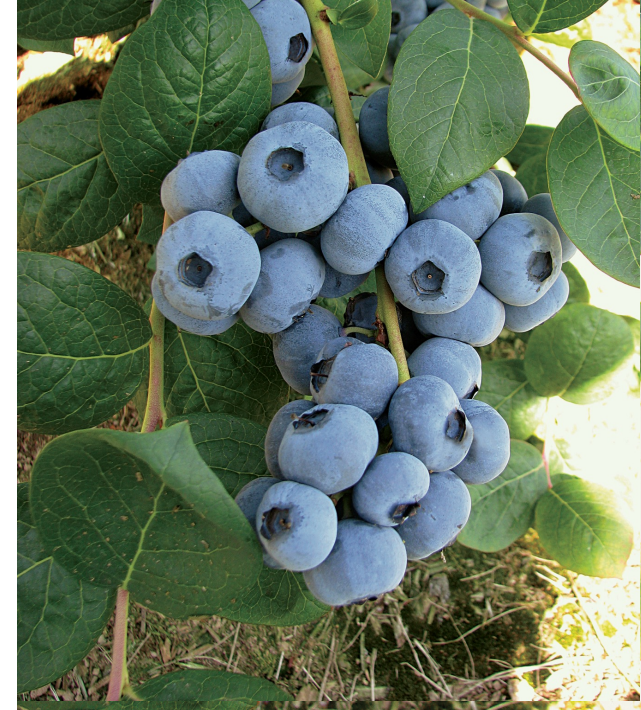


DEFINITION OF FALL CREEK® OPEN CATALOGUE

Open catalogue is **available for all customers** who do business with Fall Creek®. Order quantities do not affect customers' access to this platform and no License fees are required.

Varieties are available to anyone without any license fees, only plant royalties.

Strong portfolio of High Chill varieties from early to late season.




FALL CREEK®

**OPEN
CATALOGUE**

- Blue Ribbon
- Top Shelf
- Cargo
- Valor
- Last Call



FALL CREEK® COLLECTION



DEFINITION OF FALL CREEK® COLLECTION

The Fall Creek® Collection is a value-added blueberry genetics platform that includes tech transfer and horticultural support for professionalized commercial blueberry growers around the globe.

Our goals for this program are simple:

- Give growers a competitive advantage with a pipeline of special new genetics at all chill levels.
- Create a flexible program that gives growers the choice to stay independent in growing and marketing these varieties, or to partner with other fruit marketers.
- Help growers succeed with these varieties by offering a higher level of horticultural support and technical expertise through our advanced Applied Research and Grower Support teams.

ArabellaBlue® 'FC14-062'

- Early – mid season variety (Draper timing)
- Very good vigour and fast build up of crop
- Very good flavour, fruit quality and storage (42+ days)
- High yields
- Concentrated ripening
- 70% of the fruit exceeding 16 mm
- Avg fruit size 18 mm and 2 grams



LoretoBlue™ 'FC11-118'

- Mid, mid – late variety (Liberty timing)
- Good vigour, more „compact” plant than ArabellaBlue
- Very good flavour, fruit quality and storage (28+ days)
- High yields
- Concentrated ripening
- Avg fruit size 18.7 mm and 2.1 grams
- Uniform fruit untill last pick



LunaBlue® 'FC12-205'

- Mid – late, late variety (10-14 days after LoretoBlue)
- Very vigorous plants
- Very good flavour, fruit quality and storage (28+ days)
- Avg fruit size 17 mm and 2 grams





DEFINITION OF SEKOYA®

SEKOYA® is an **actively managed B2B supply and fruit sourcing platform** to retail, built around a series of carefully selected varieties, services, quality assurance, and supply chain coordination to create and serve a new mass-premium blueberry category.

A **small group of independent SEKOYA® Members** build our semi-exclusive network of highly professional, diverse grower-marketers that produce volumes within their grower networks and sell fruit directly to all major markets.

The **goal is to grow the category** through firmness, extended shelf-life, and customer satisfaction, while reducing food waste.



GLOBAL SEKOYA® MEMBERS



SEKOYA® is a B2B-branded platform designed to deliver the LIVIE™ Eating Experience: crunchy, long-lasting & tasty blueberries – 52 weeks per year. 15 Members have global rights and opportunities.



SEKOYA CRUNCH® 'FC13-083'



- **Early season variety (Duke window)**
- **Firm, crunchy and very tasty fruit**
- **Very good cold storage performance**
- **Average size 19 mm and 2.5 grams**

MID-HIGH CHILL



SEKOYA GRANDE® 'FC13-122'



- **Mid season variety**
- **Firm, crunchy and very tasty fruit**
- **Very good cold storage performance**
- **Average size 19 mm and 2.6 grams**

MID-HIGH CHILL



SEKOYA FIESTATM 'FC13-113'



- **Average size 21 mm and 2.8 grams**
- **Firm, crunchy and very tasty fruit**
- **Very good cold storage performance**
- **Late season variety**

MID-HIGH CHILL



FC11-164

- Mid-late variety possible to be picked in one pick
- Very well suited for mechanical harvest
- Very firm fruit and exceptional storage
- Amazing flavor and crunchiness



FC11-164

- Commercial trials launched in Europe in autumn 2023/spring 2024
- Planted on Row trials in spring 2023 in several locations across Europe
- 2024/2025 – continue commercial trials
- 2025 – 2027 – Assess data gathered from the growers
- Depending on the performance and feedback launching a new variety



Mechanisation

- All of the varieties with good firmness can be picked with good harvesters (Valor, Cargo, Collection)
- In NL it is common to pick even Duke with harvesters
- FC11-164 can enhance the effectiveness and optimization of harvesting with machine but it is not the only variety suitable for that



Market Update

- Poland
- UK
- Netherlands/Germany
- Romania/Serbia
- Spain/Portugal



Poland

- Very early start (2-3 weeks advancement compared to 2023)
- Significant frost damage in Western Poland
- Retailers are claiming that fruit size is below average
- No peak?
- Less fruit than in 2023
- Price for Duke at 20th of June – 5,5 euros for bulk fruit
- Higher prices for new varieties with good cold storage



Turkey

- Early start – February – SHB
- Average prices for bulk – 5,5-6 euro/kg (south of Turkey)
- Main markets – internal, East and Europe
- High demand for high quality fruit!
- NHB production in the North also early with prices 4-5 euros/kg bulk



Romania

- Very early season – 3 weeks earlier
- Big gap in prices depending on the grower power – small vs big (2-6 euros/kg)
- Overlap with Spanish and Moroccan season
- Interest in new varieties
- Growers already looking for harvesting machines



Spain

- SHB season later than 2023
- Average price around 4.5 – 5 euros/kg
- Better price for good quality fruit of new genetics

Portugal

- Season started 1 week earlier than 2023
- Growers struggling with labor
- Need for mechanisation, looking for machine harvest varieties



Georgia

- Early season – 10 days earlier than 2023
- Average price around 4.5 euros/kg but many growers unhappy
- Main markets – Russia, Germany



**TO BUILD A
WORLD WITH
BETTER
BLUEBERRIES**

THANK YOU



Presented by: Fall Creek® Farm and Nursery | Date: 22 September

