



Reporte de las tendencias mundiales del Kiwi

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Fedefruta
FEDERACION DE PRODUCTORES DE FRUTAS DE CHILE

Comité del Kiwi





Arqueología del kiwi, de dónde venimos
Presente del kiwi, dónde estamos

Las tendencias del mundo
Consumidores, marketing y competidores

El futuro al que vamos, cómo nos preparamos para un viaje exitoso



WORLD TOTAL KIWI PRODU

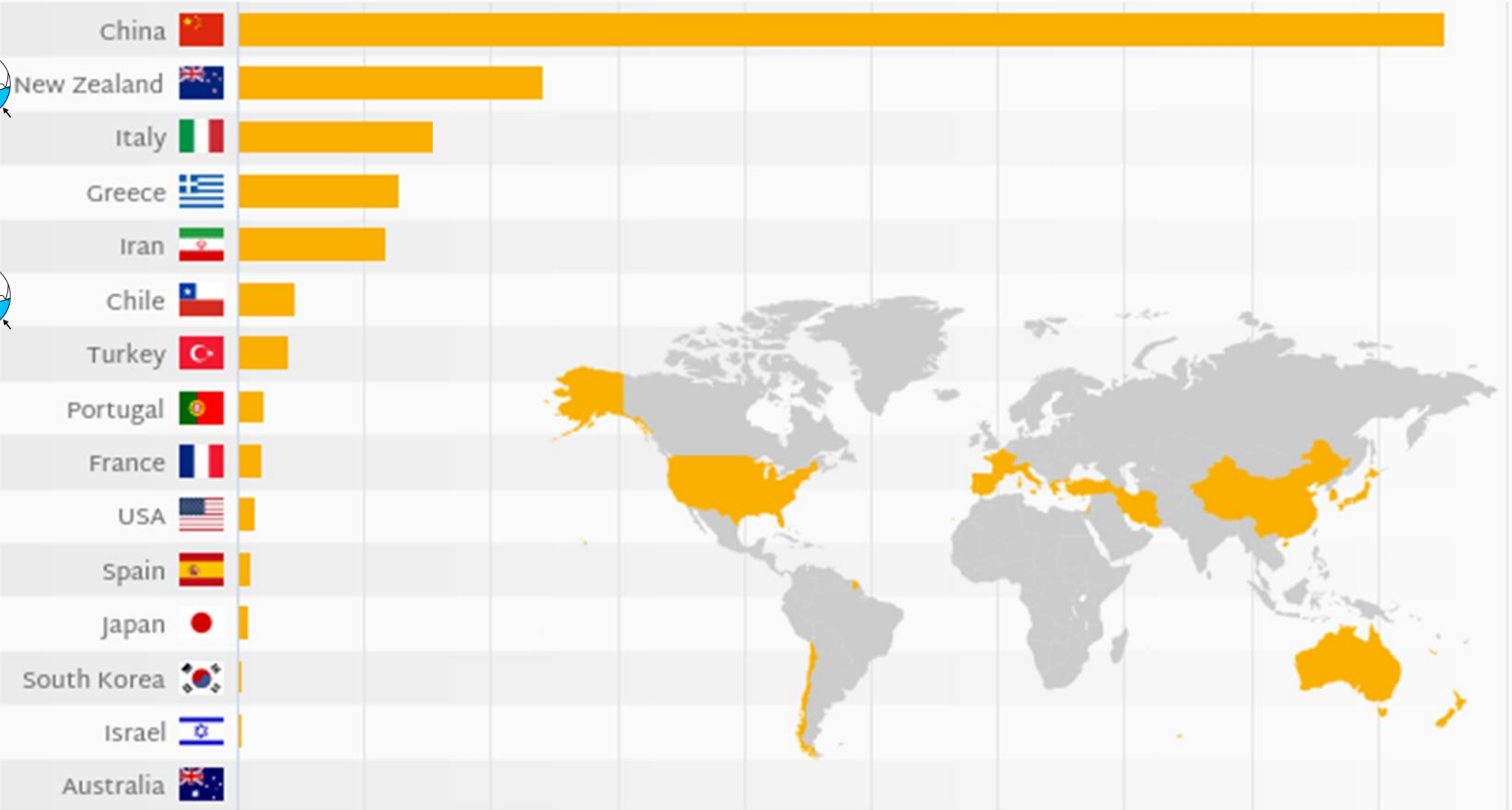
Top Southeast Asia (Asean) Export - Goods and Services



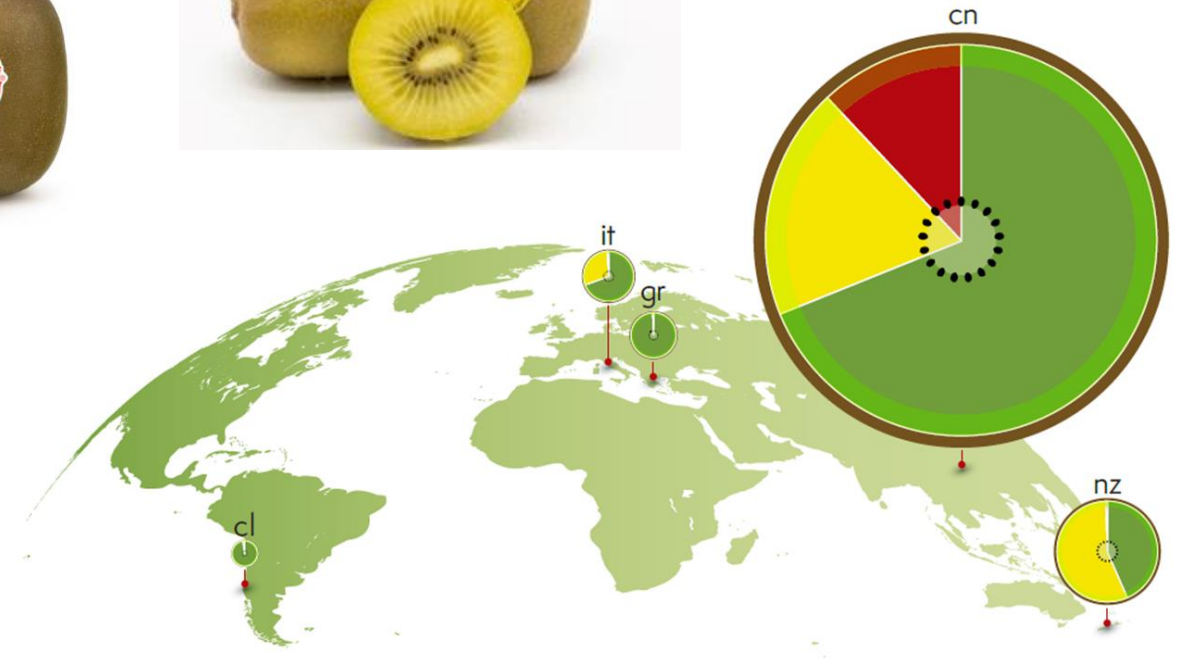
Data Sources: UNITED NATIONS



2022 PAÍSES PRODUCTORES DE KIWI (ton)



Pasar de un mundo mono varietal, a uno multi varietal y multi color



¿Canibalismo del amarillo al verde?



Pandemias y enfermedades frutales y su impacto disminución de la superficie, de la producción y de la oferta



KIWIFRUIT'S MOST UNWANTED

Out of this world (OHW) undertakes research and response planning to minimise the impact of future biosecurity incursions to the kiwifruit industry.

The following organisms are considered the highest risk to the kiwifruit industry, based on the likelihood of them getting here and establishing, and the potential production and market access implications should they occur.

Our most incursions aren't necessarily the most important to this list, however, we intend to be on alert for any unusual patterns of pest symptoms and outbreaks on orchard biosecurity best practices. See more.

FRUIT FLIES Quarantined, Chiral, Mediterranean - High likelihood of entry - have crossed sea routes many times. - Highly invasive pest with a range of horticultural hosts, but considered low risk to kiwifruit. - Severe impact across horticulture, particularly for Mediterranean fruit fly which is not present in most major kiwifruit markets.	CERATOCYSTIS WILT - But for its long history causing damage to kiwifruit in Israel - reports of up to 50% vine loss. - Vine death can occur extremely rapidly after appearance of symptoms. Prevent and control measures to be reviewed. - Distribution globally and other strains may be at risk of entry to kiwifruit. - May be available with good biosecurity practices and if detected early.
BROWN MARMORATED STINK BUG - Pest on kiwifruit resulting in fruit drop and rot. Fruit loss potentially 5-20% but up to 50% on worst results. - Extremely difficult to eradicate - early detection is essential. - Major nuisance pest overwintering inside houses in high numbers. - High likelihood of entry as a hitchhiker on shipping containers, cars, machinery and luggage.	SPOTTED LANTERNFLY - Already over 30 host species, including kiwifruit - considered a high risk invasive pest. - Production impacts from extensive feeding resulting in stunted growth, wilting, and some fruit drop, which can be severe. - Highly invasive pest that is hard to control - tends to fly out of orchards when spotted are released.
PSA NON NZ STRAINS - A2 has been found in NZ - other non NZ strains are also present and may spread to other kiwifruit. - Part of the A2 strain is known to be more virulent to kiwifruit than the A2 form of the pest. - Have been found on the kiwifruit in the United Kingdom. - May be difficult to distinguish from 'common' A2 as it is a very similar pest.	WHITE PEACH SCALE - Regularly intercepted on imported fruit. Therefore any imported fruit should be taken on to orchards as a precaution. - Up to 20% production losses reported on Italian orchards. - A2 environment considered favourable for establishment.
YELLOW SPOTTED STINK BUG - Large stink bug with distinctive yellow markings. Adults are about the size of a 50-cent coin. - Attacks more than 30 host species, including kiwifruit. - Feeding damage can result in significant fruit loss, similar to BMSB. - Known kiwifruit pest which can arrive on shipping containers, cars and machinery.	INVASIVE PHYTOPHTHORA - Known as the 'potato blight' - a group of significant plant pathogens and a major threat to global food security. - Species have caused plant impacts to kiwifruit orchards. Many other known and unknown species could also cause severe impact under certain conditions. - Local spread, particularly with plant material movements. - Can spread to plants showing no symptoms.

Verticillium

Sintomatología

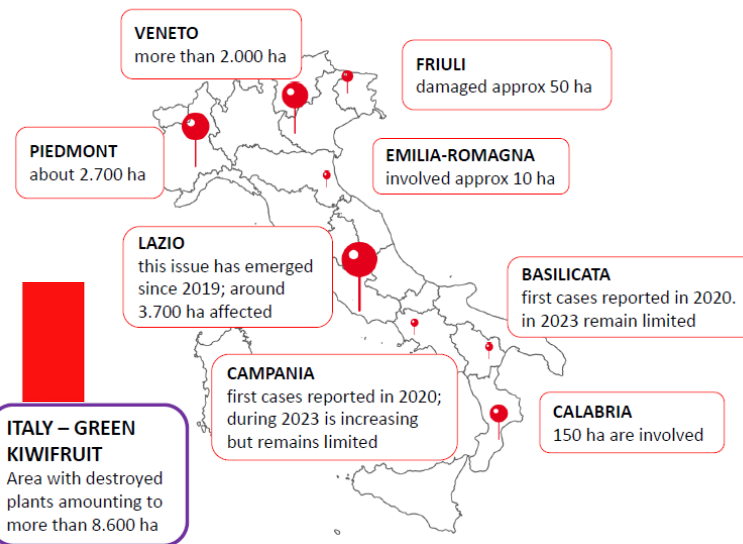
Siembra de Tejidos

Muestras

Alternaria rorescens ás probable)

Biosecurity Report - KVDS

Kiwifruit vine decline symptoms in Italian regions
Hectares of green kiwifruit involved **from 2012 to 2023**

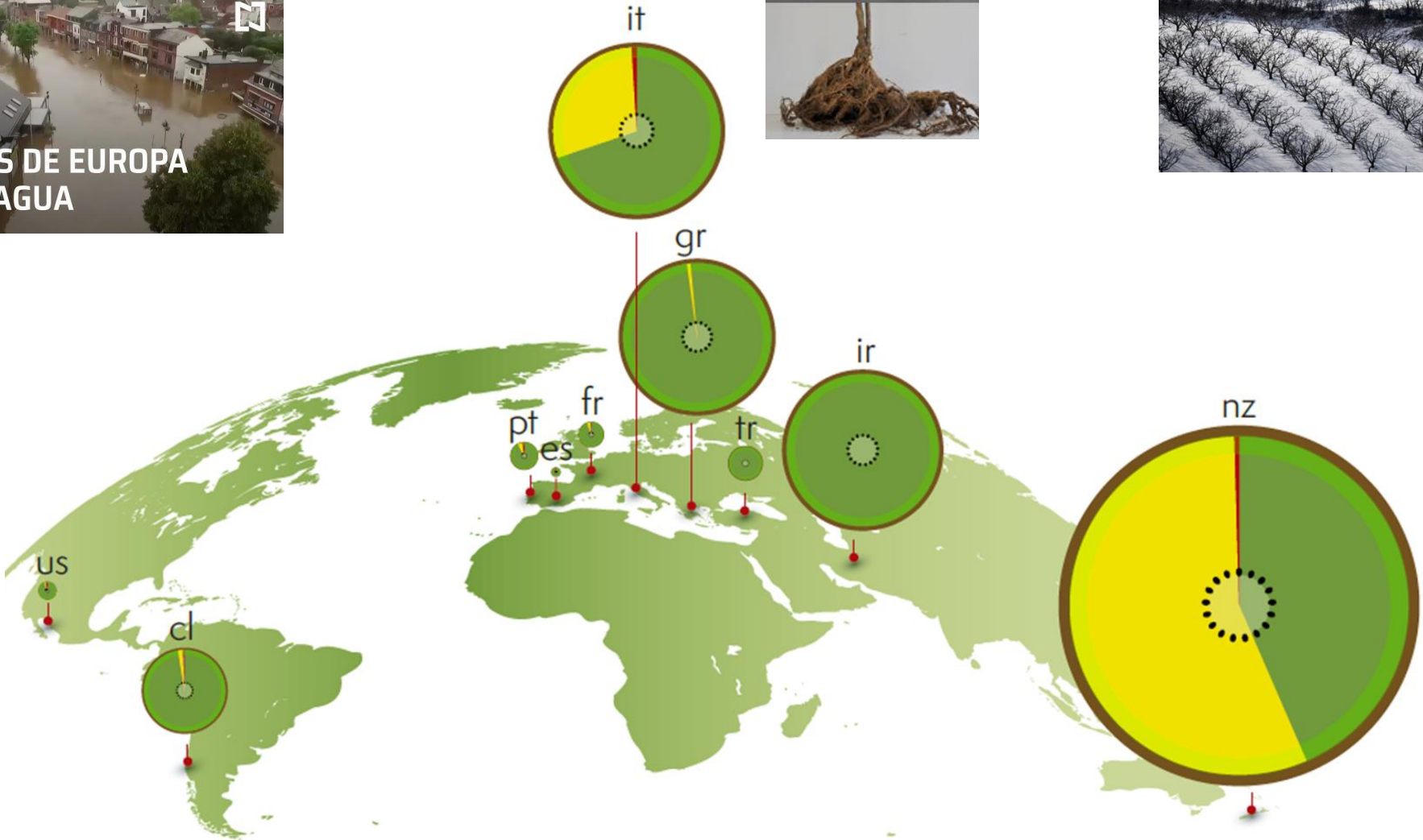


MORIA DEL KIWI:
A CHE PUNTO SIAMO?

Hemos tenido una ventana de 6 años de altos precios, debido a la baja producción de otros países



Incremento Parámetros
PAM



Ciclón en Nueva Zelanda

Precipitaciones
en las últimas 24h
(mm)

Al 14 de feb.

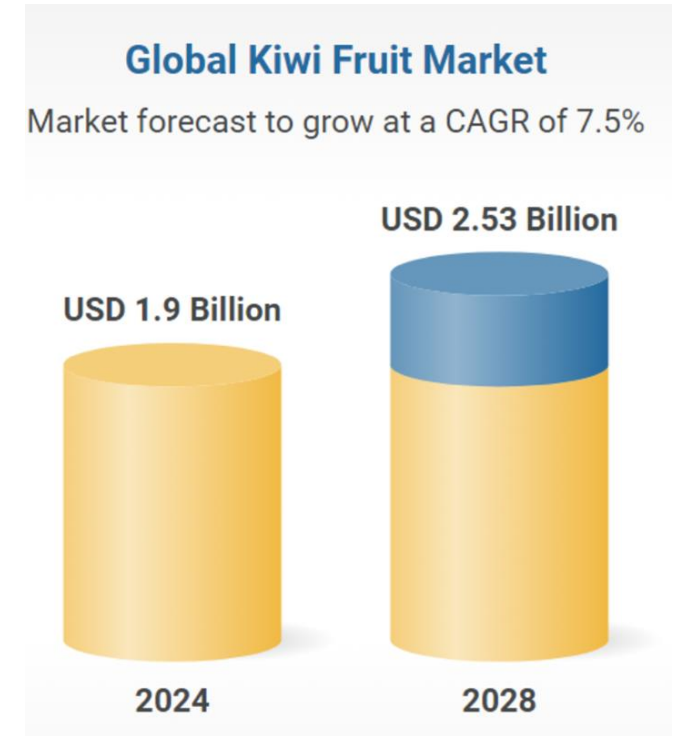




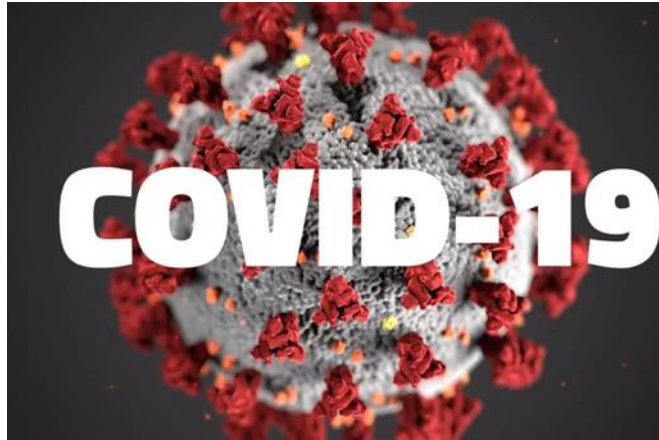
Las tendencias del mundo

Consumidores, marketing y competidores

¿Esto es la demanda y el consumo real,
o es la confesión de las estadísticas bajo tortura?



¿Qué razones puede haber o hay detrás de esto?



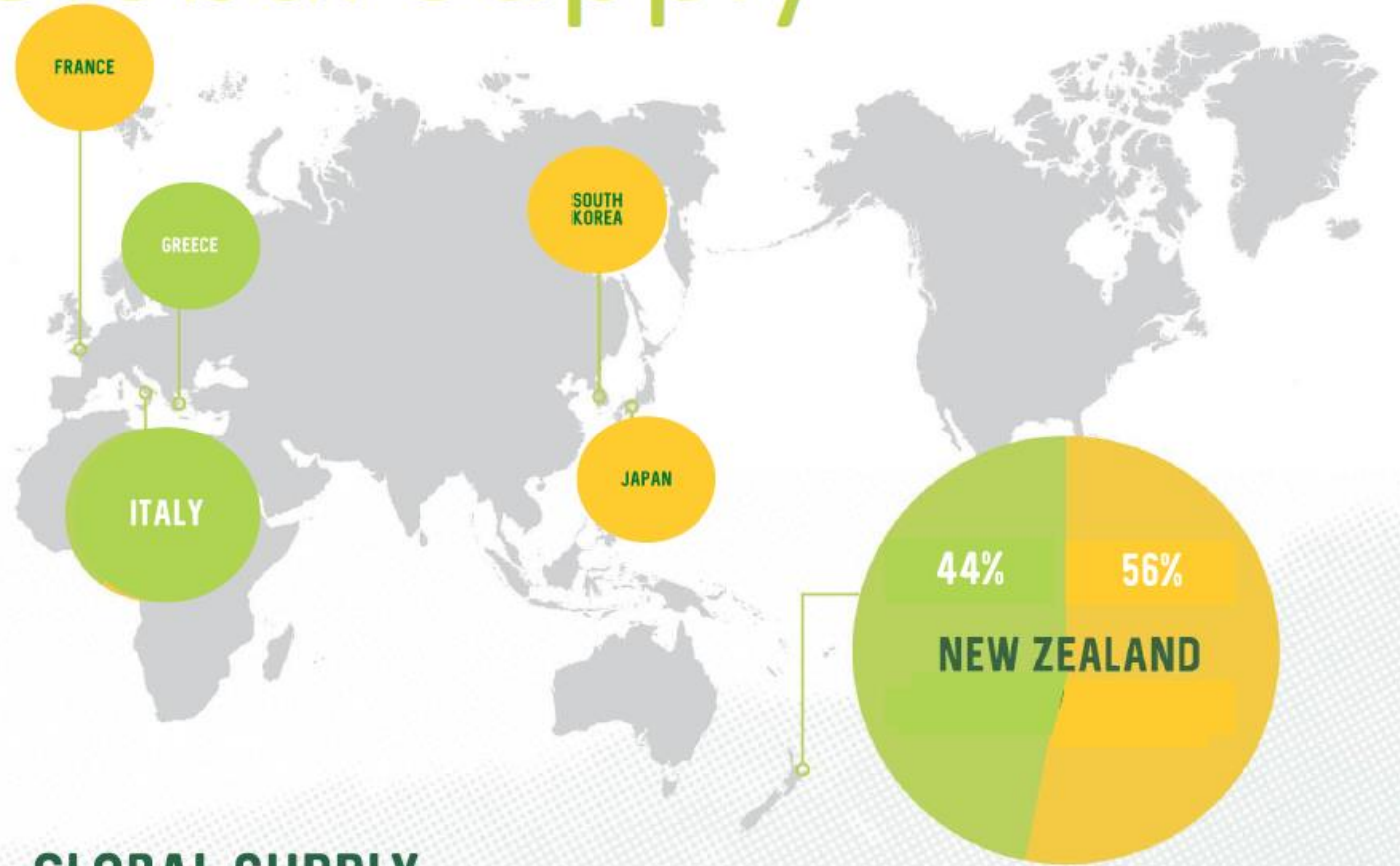
STRATEGY – 12 MONTH SUPPLY

Zespri Global Supply



BENEFITS

- GREATER RETURNS TO GROWERS
- SHARING OF EXPERTISE
- COOPERATION ON R&D AND TECH TRANSFER
- JOBS AND OPPORTUNITIES
- INVESTMENT
- MAKES US MEMBERS OF THOSE COMMUNITIES
- MAKES BRAND AND MARKETING SPEND MORE EFFICIENT



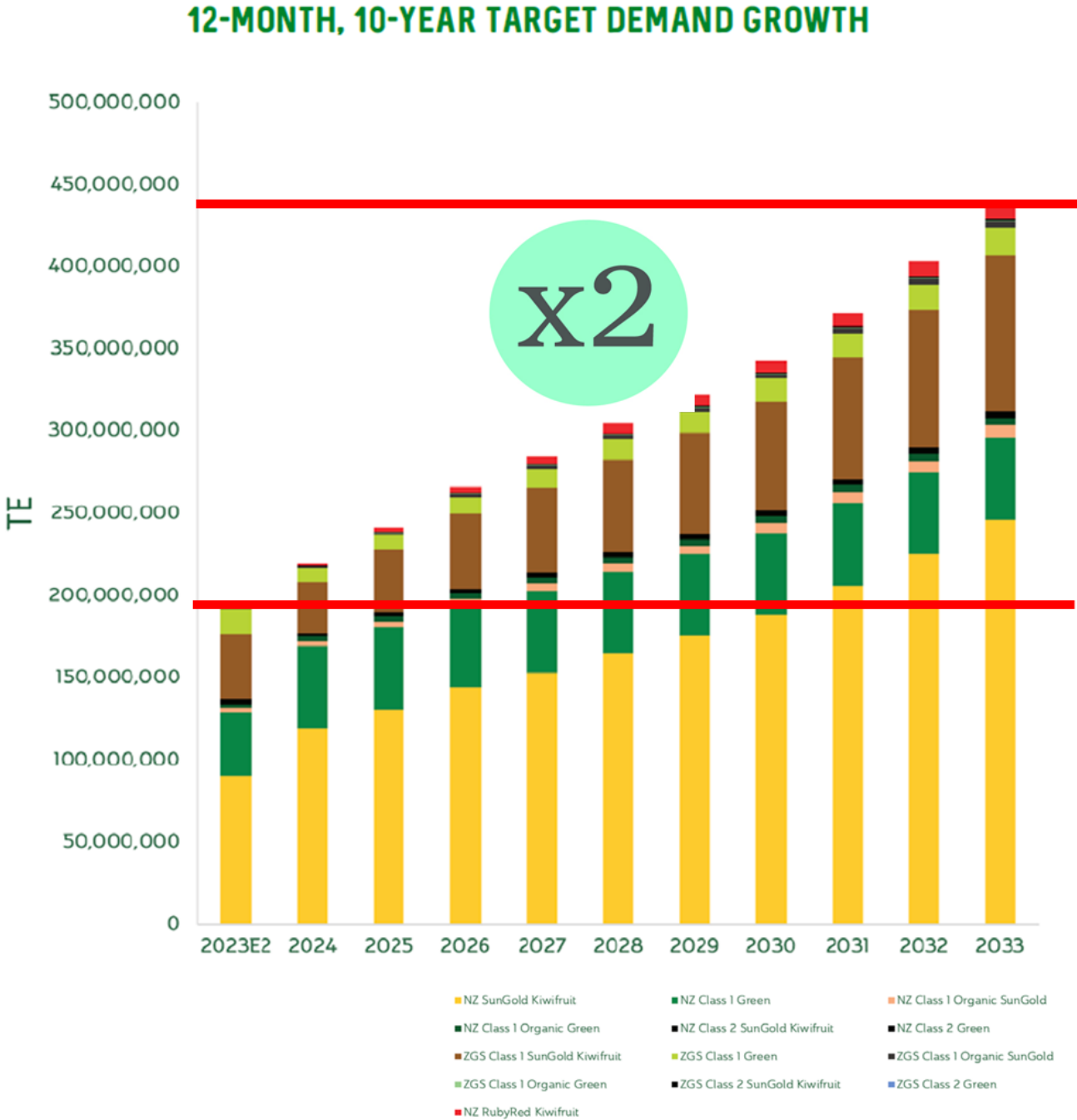
GLOBAL SUPPLY
STATISTICS 2021/22

- Percentage of Green trays supplied
- Percentage of Gold trays supplied

Estimación de Nueva Zelanda - 10 años plazo

El volumen de Nueva Zelanda se duplicará en 10 años. Principalmente en amarillos.

NZ proyecta al 2064 que el kiwi sea el 2% de las frutas.



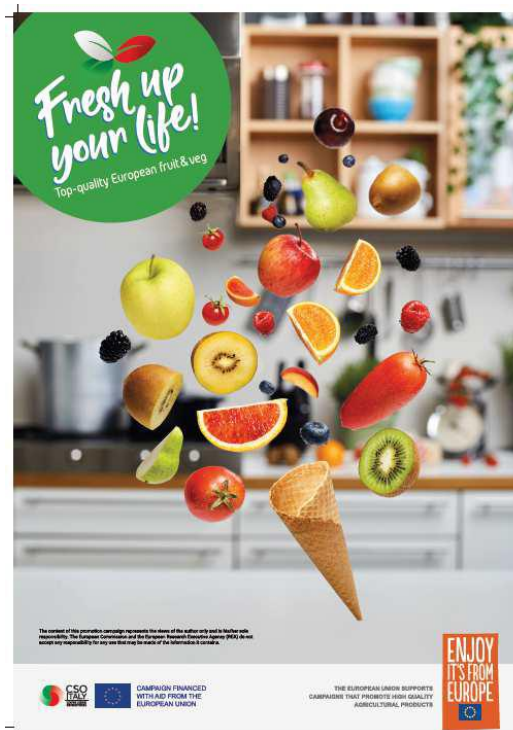
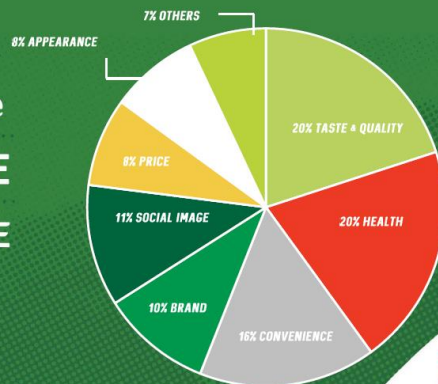
WHAT'S IMPORTANT TO PEOPLE Buying Our Kiwifruit

TASTE &
QUALITY
BRAND

Health
PRICE
+ Others

Convenience
SOCIAL IMAGE
APPEARANCE

CONSUMER DECISION MAKING FACTORS



Small in size.
Big on nutrition.

Kiwifruit from Chile



Las nuevas generaciones son protagonistas de los cambios:

	Baby Boomers 22%	X 18%	Millennials (Y) 42%	Z 17%
	Análogos	Inmigrantes digitales	Nativos Digitales (59%)	
Año	1946-1964 (49-57 años)	1965-1979 (35-48 años)	1980-1999 (15-34 años)	2000 (0-14 años)
Hitos	Guerra fría, Woodstock	Muro de Berlín, Early mobile	Globalización, 9/11	Calentamiento global
TIC				
Comm.				
Shop	Son reflexivos y lentos	Son reflexivos y lentos	Toman decisiones inmediatas	Inmediatez y Switch
Motivación	Orden Estructura	Logros Metas	Socialización Disfrute	Contribución Movilidad

Base total: 6.750 casos; 6.834 Exp

Radiografía del consumidor en el GQ 23/24

Resiliente, reflexivo y activo en la búsqueda de ofertas

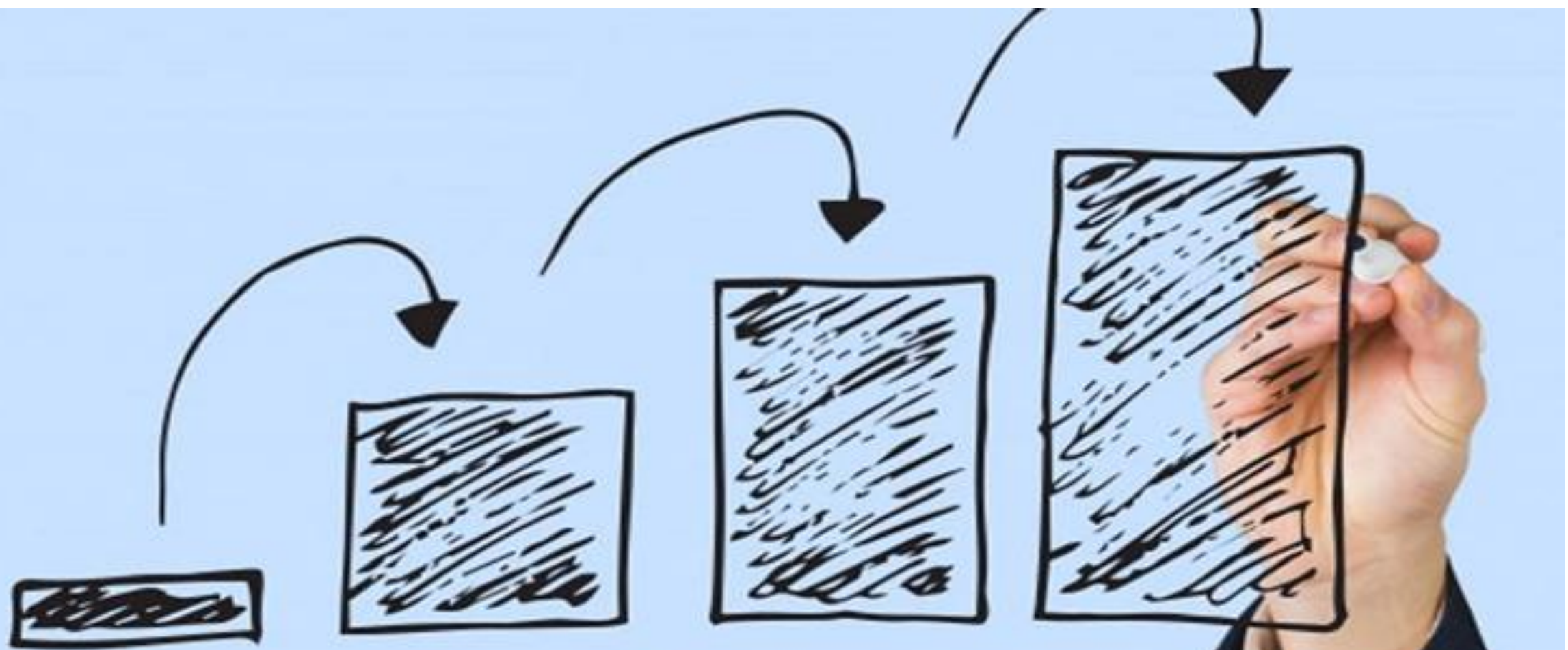


42th IKO CONFERENCE
CURICÓ • CHILE • 2023



**El futuro al que vamos, cómo nos preparamos
para un viaje exitoso**





EVOLUCIÓN Del CONSUMIDOR



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ASOCIACIÓN DE PRODUCTORES DE FRUTAS DE CHILE

Comité del Kiwi



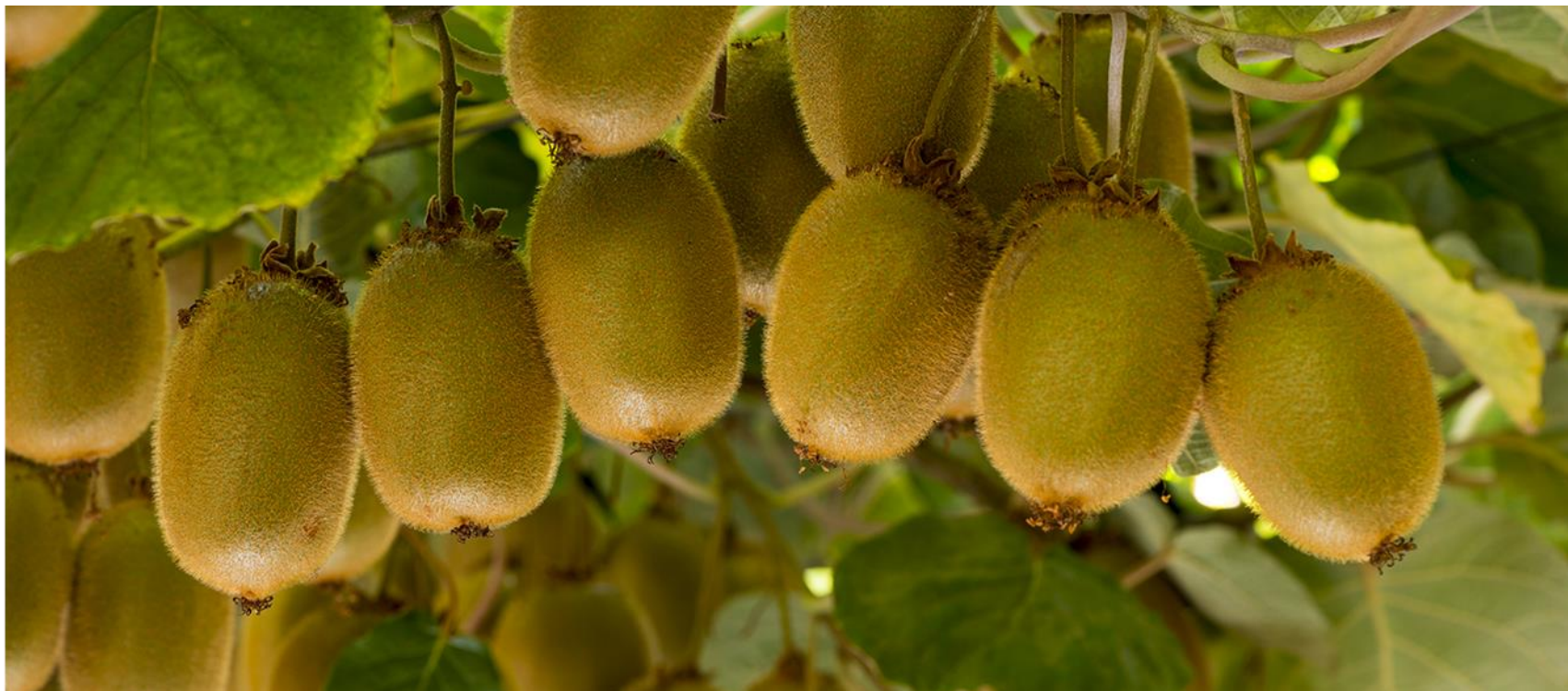


Debemos estar preparados para un viaje en que vamos a seguir al consumidor permanentemente, considerando desde la partida que

- Hay un buen mercado para el kiwi verde de buena calidad
- Con producciones altas y estables el productor se sustentará
- Después de 40 años, aún no somos tan buenos produciendo verdes
- Es importante producir bien las variedades amarillas
- Nuevos competidores pueden surgir en el hemisferio sur
- Una alta calidad de producto permite competir
- El consumidor debe disfrutar comer un kiwi de Chile
- No se nos debe olvidar que el que paga el viaje es el consumidor satisfecho, no el importador o la cadena logística. Sin sabor y una fruta competitiva, el futuro es frágil como para arriesgarse en la magnitud de las inversiones que se requieren

La teoría de la evolución del
consumidor





**Tenemos las capacidades y las condiciones para
ofrecer un excelente producto**