



VISION SOUTHERN HEMISPHERE



INTER
PERA
2010

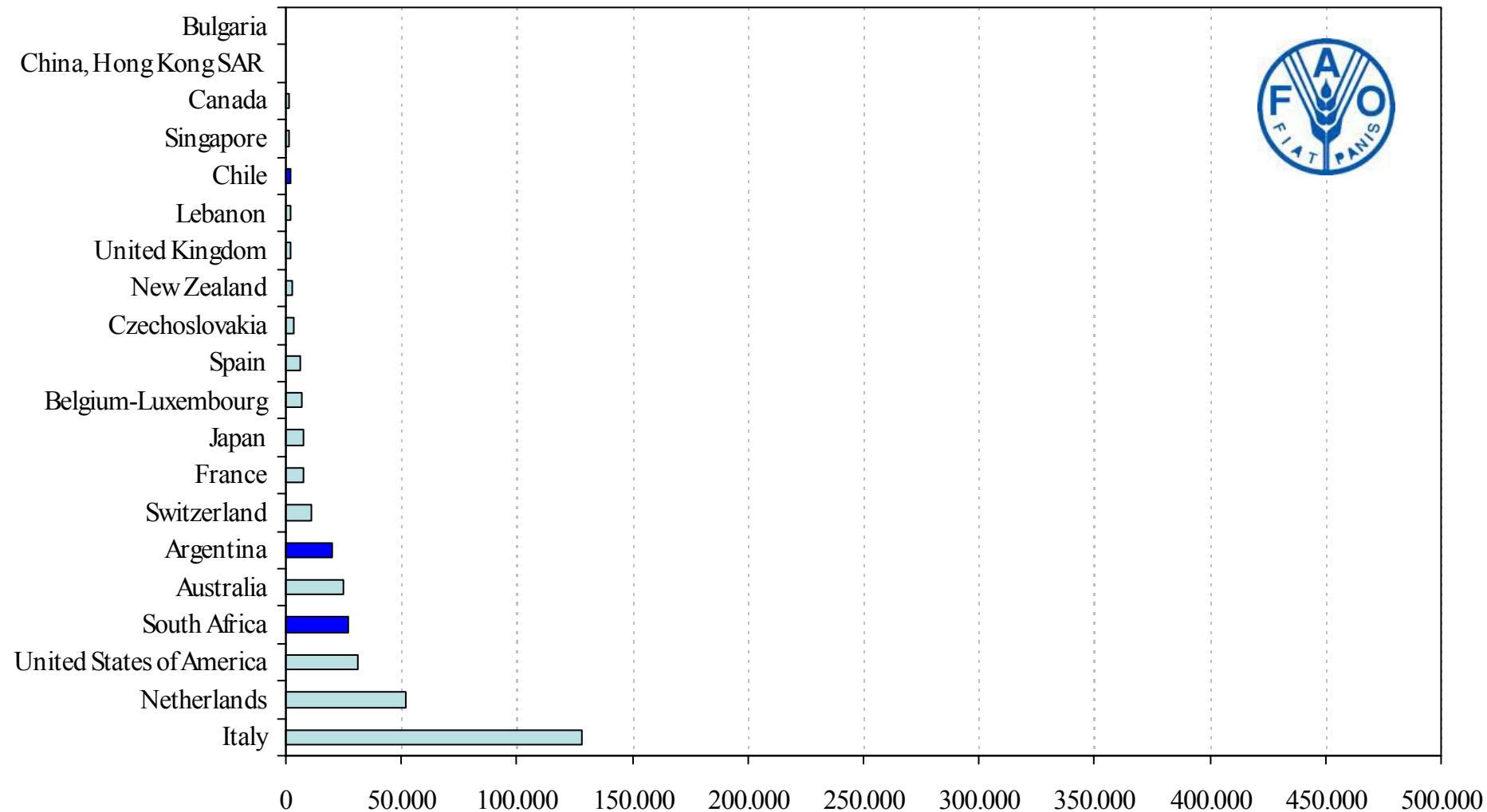
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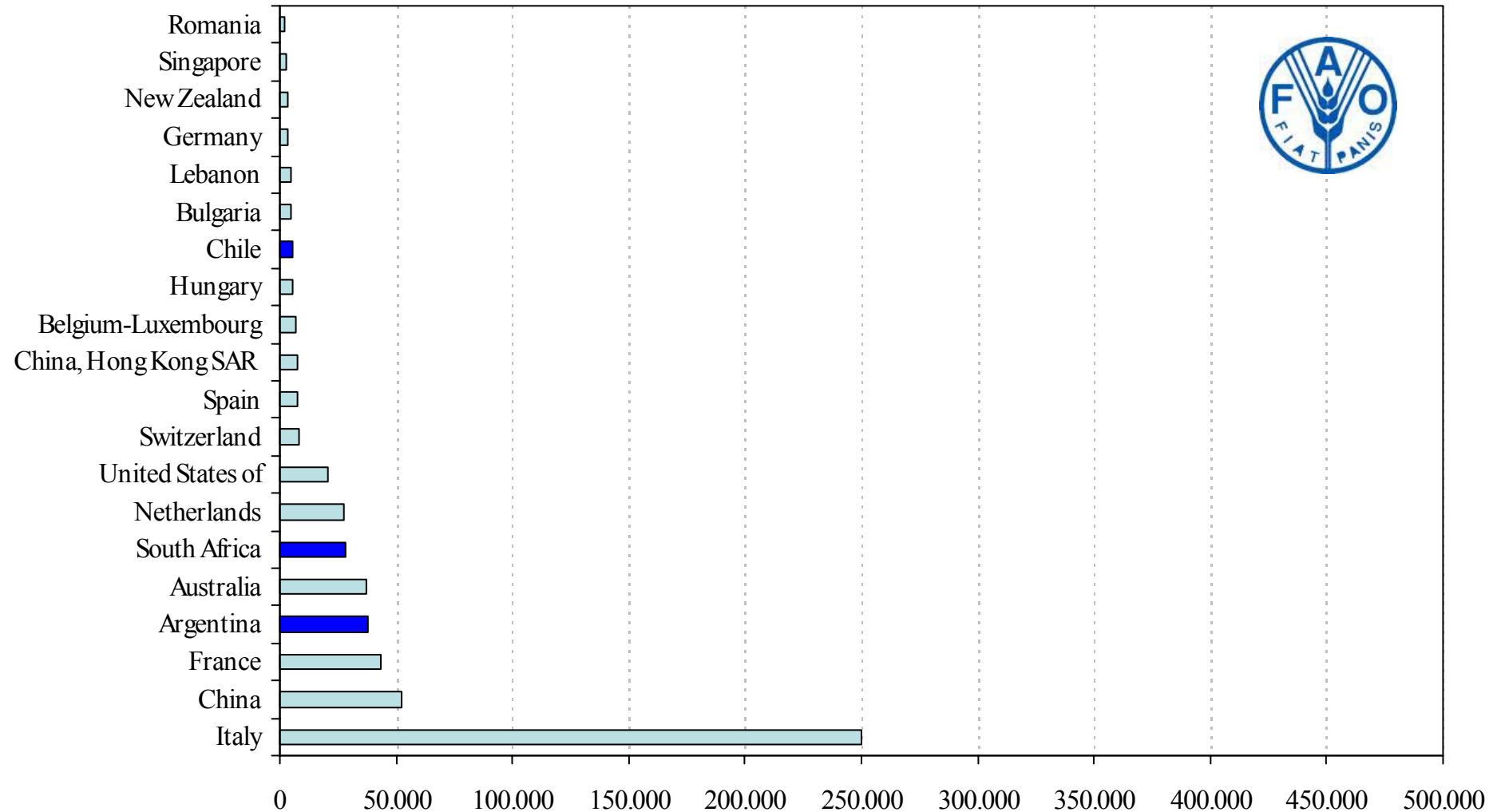



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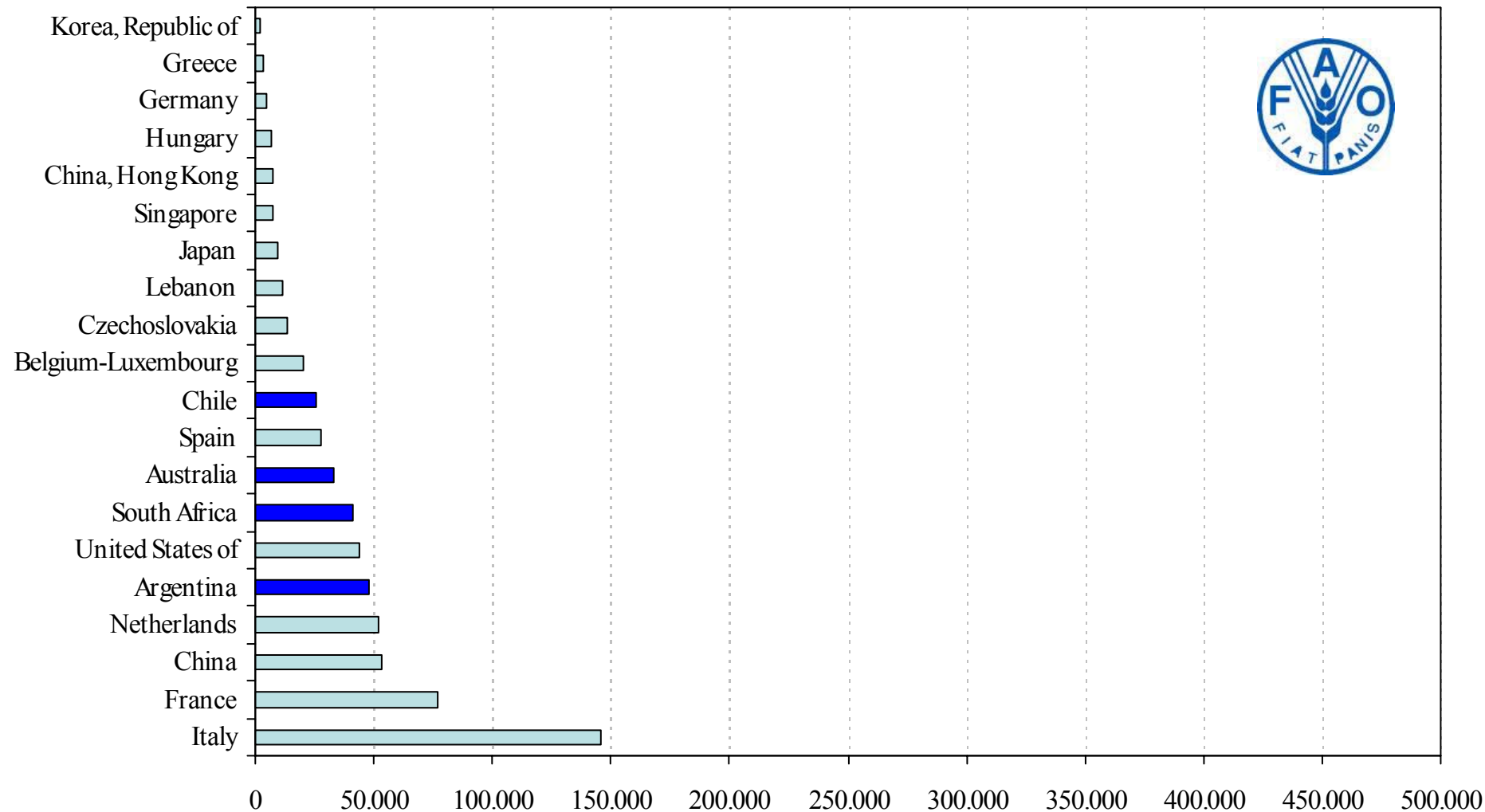
GLOBAL RANKING OF EXPORTERS OF PEARS (1961, TONS)



GLOBAL RANKING OF EXPORTERS OF PEARS (1970, TONS)

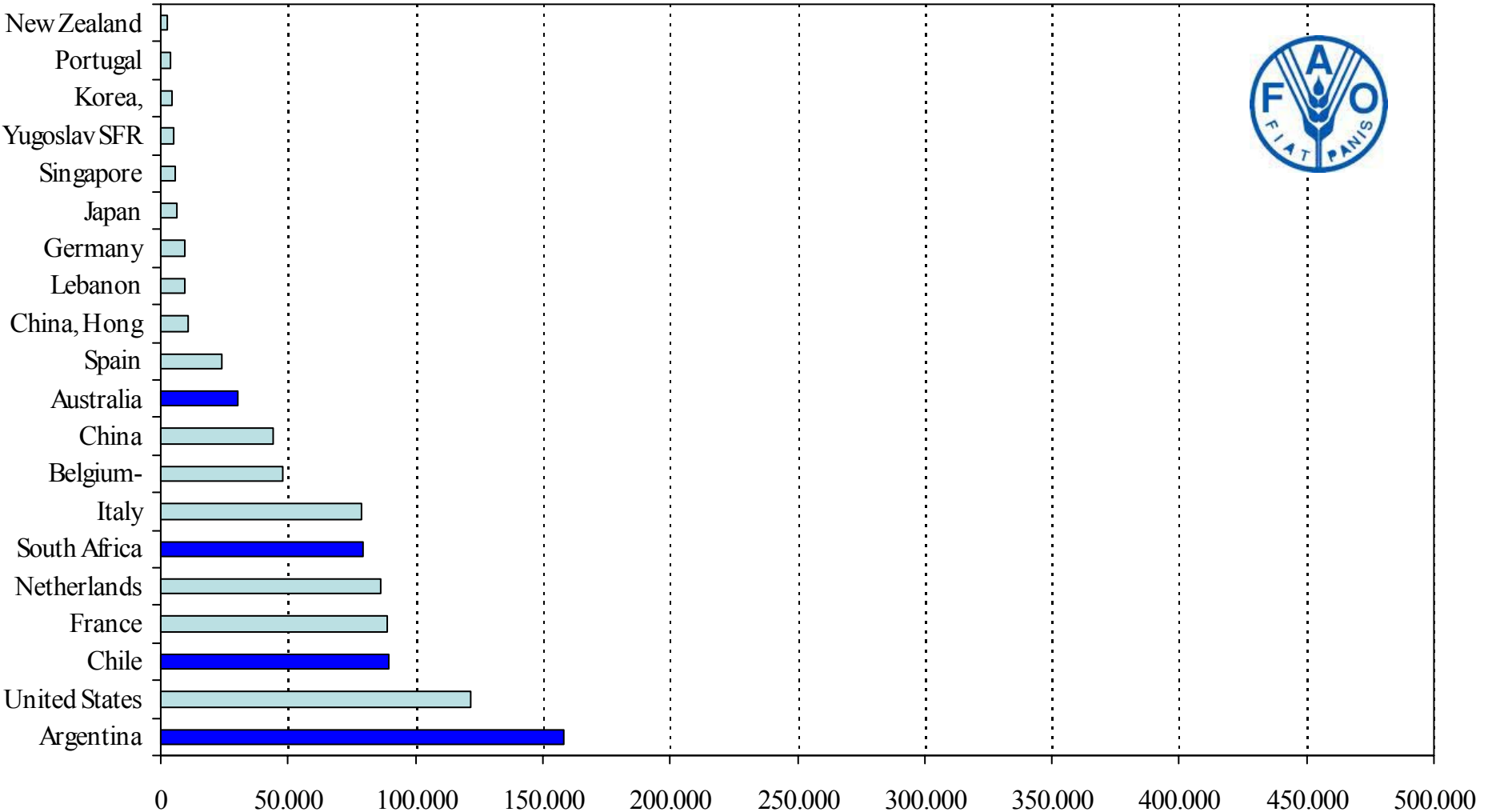


GLOBAL RANKING OF EXPORTERS OF PEARS (1980, TONS)

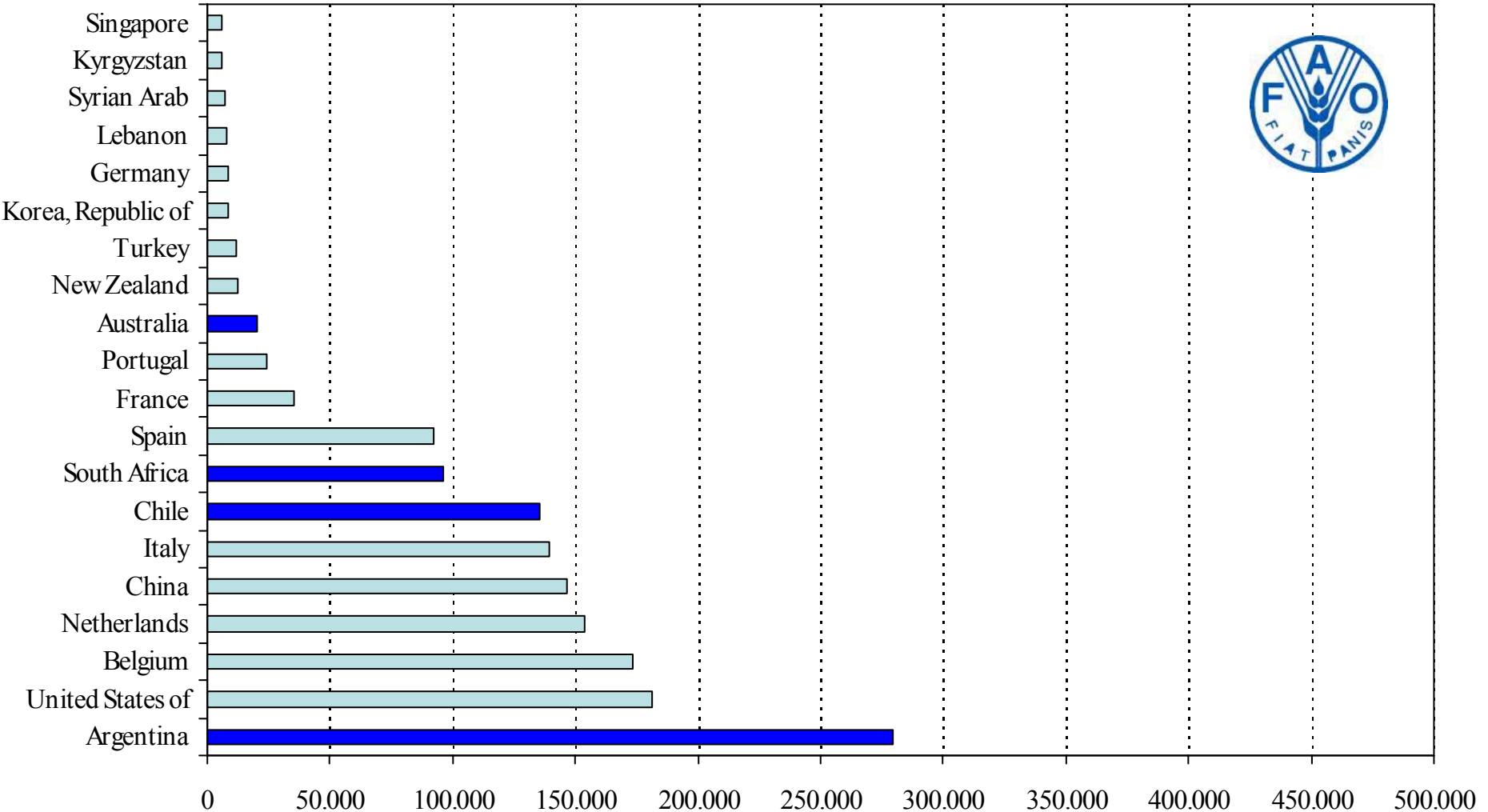




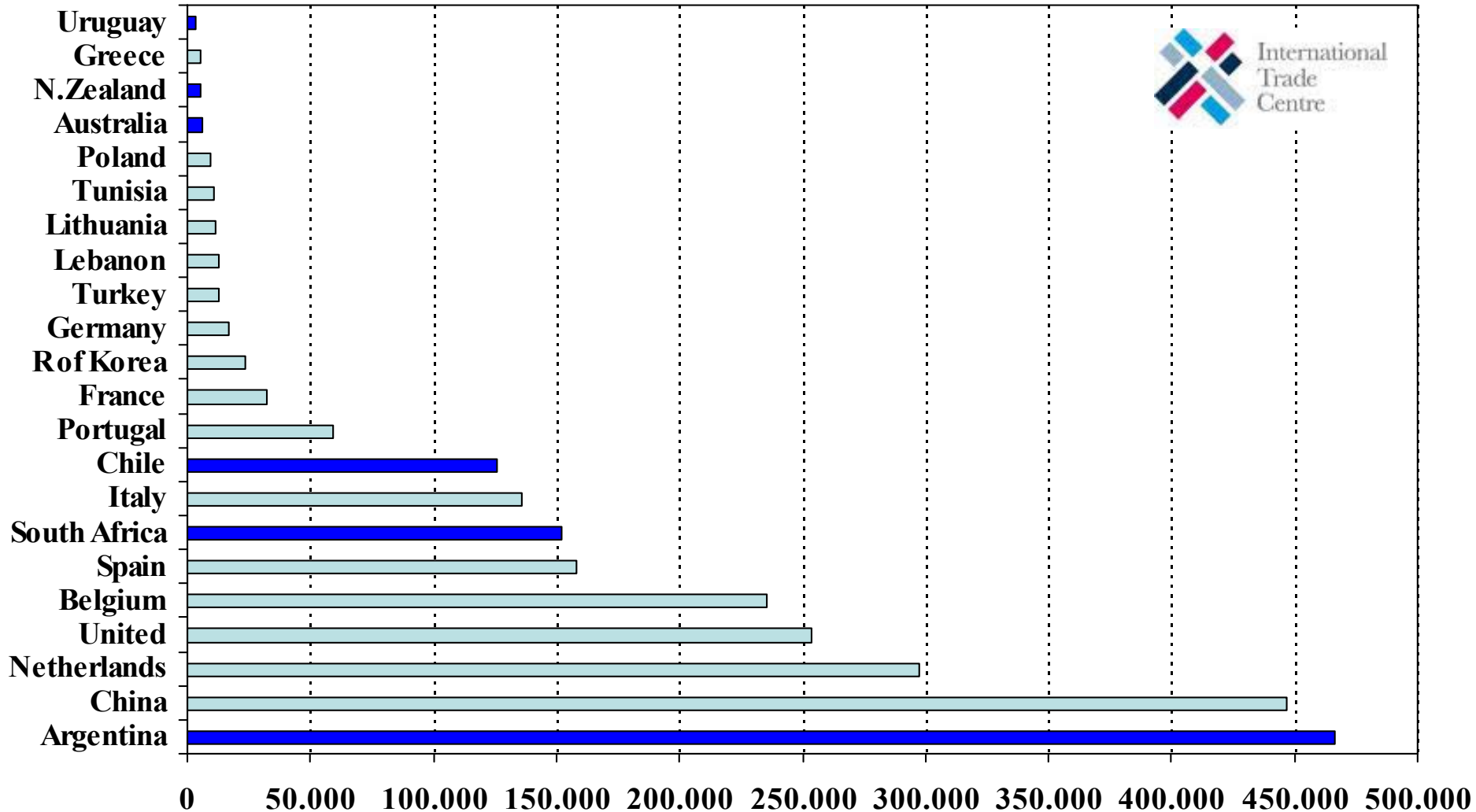
GLOBAL RANKING OF EXPORTERS OF PEARS (1990, TONS)



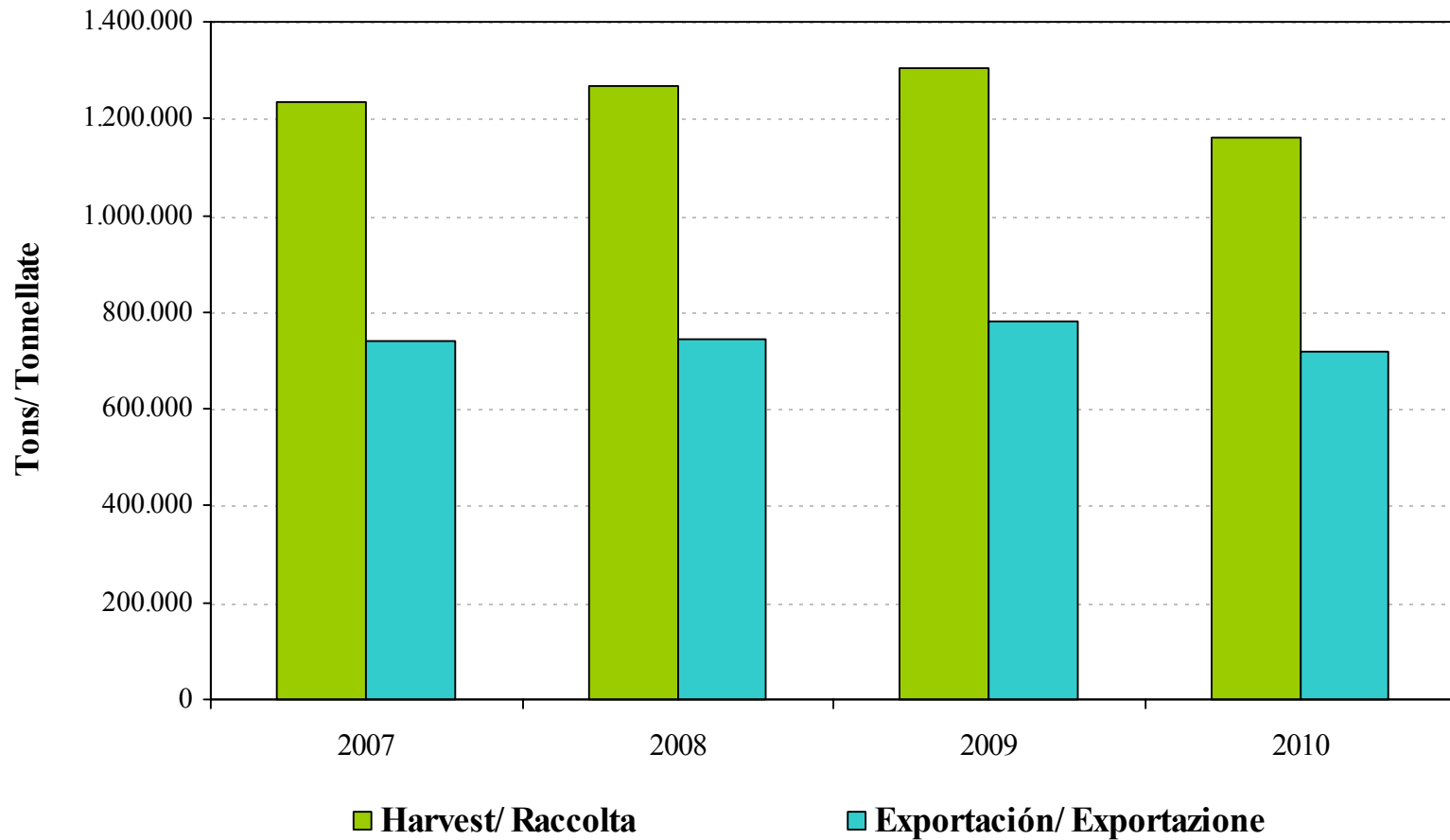
GLOBAL RANKING OF EXPORTERS OF PEARS (2000, TONS)



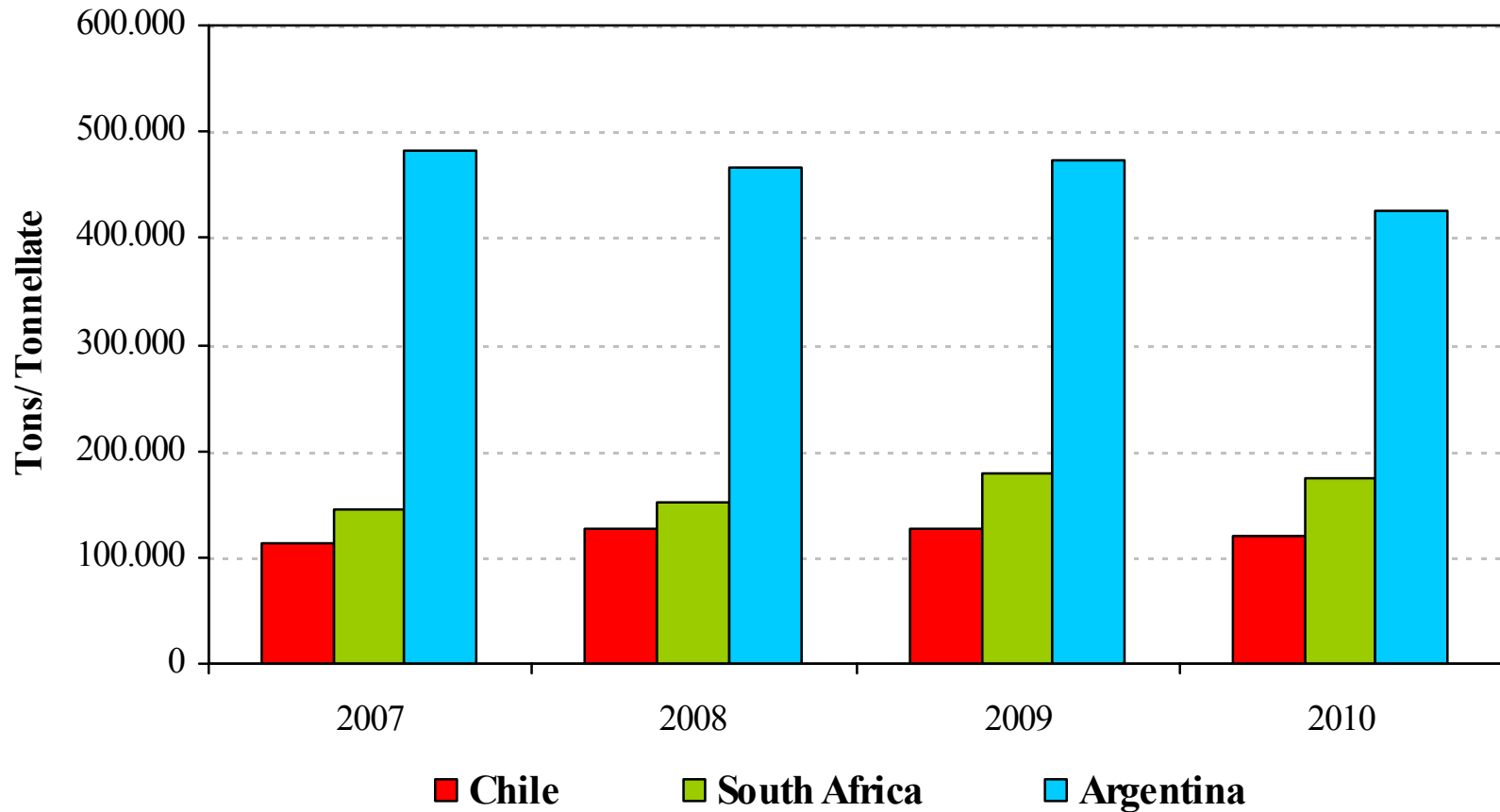
GLOBAL RANKING OF EXPORTERS OF PEARS (2008, TONS)



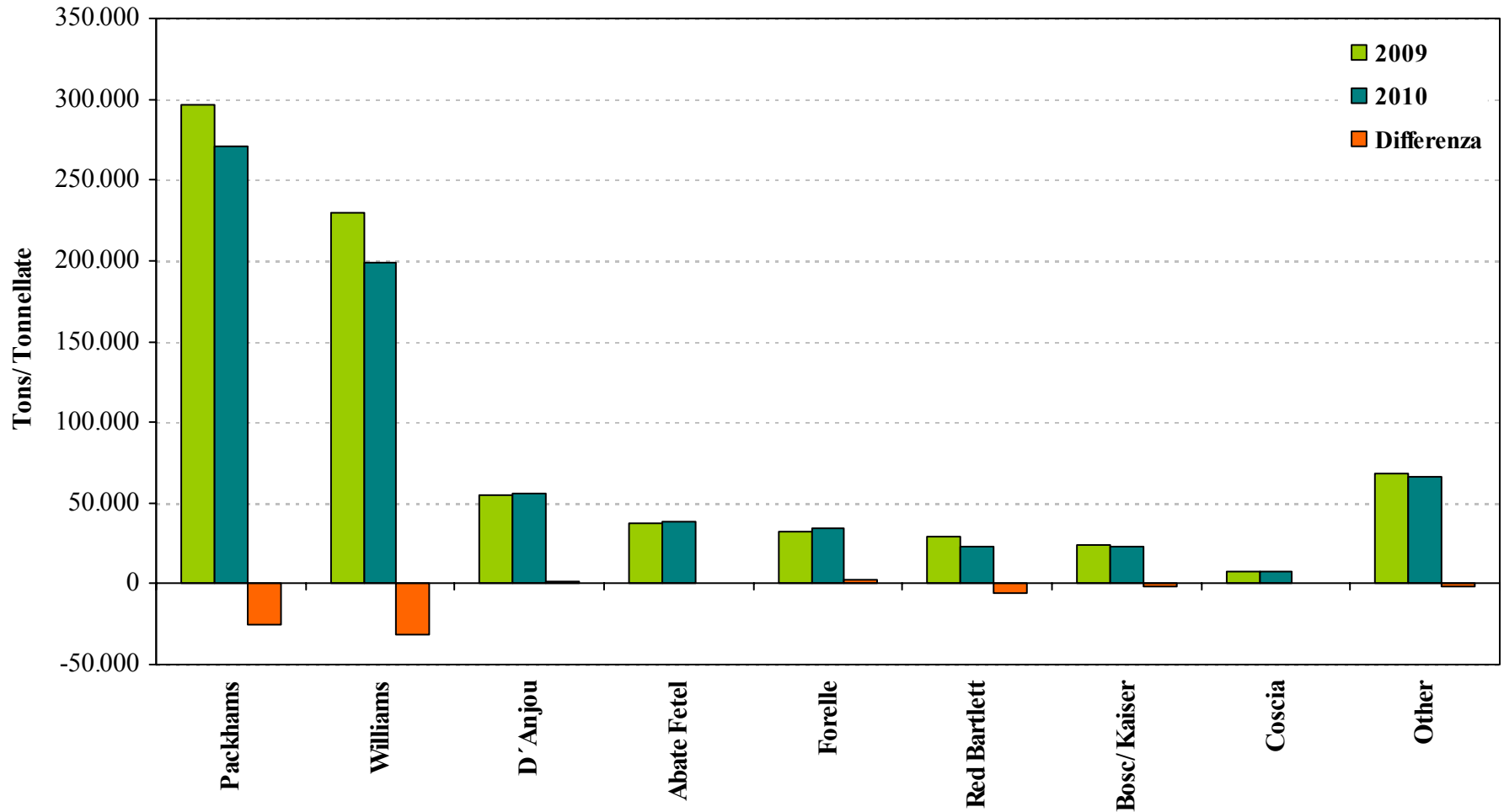
SOUTHERN HEMISPHERE: DEVELOPMENTS IN PEARS



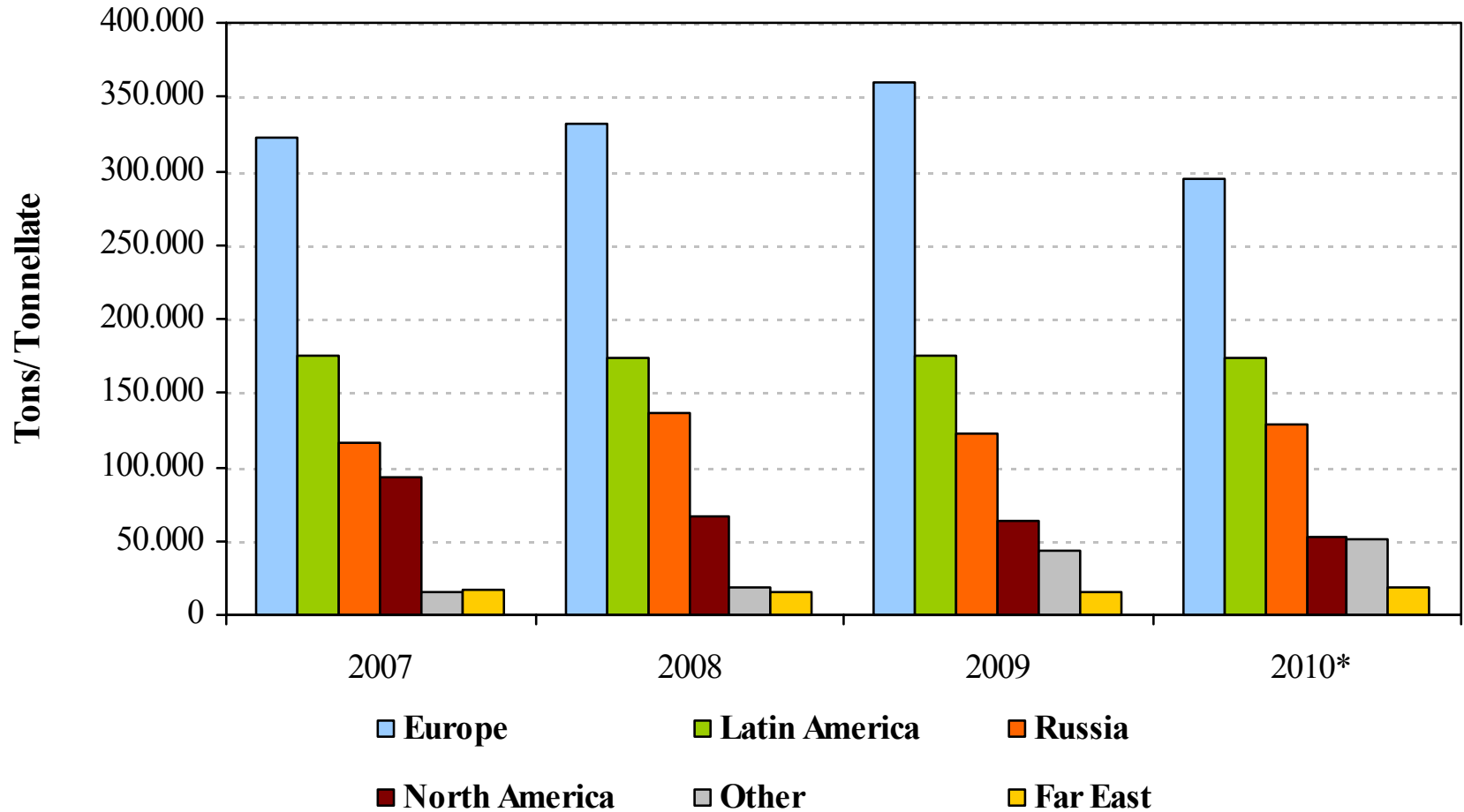
SOUTHERN HEMISPHERE: EXPORT OF PEARS



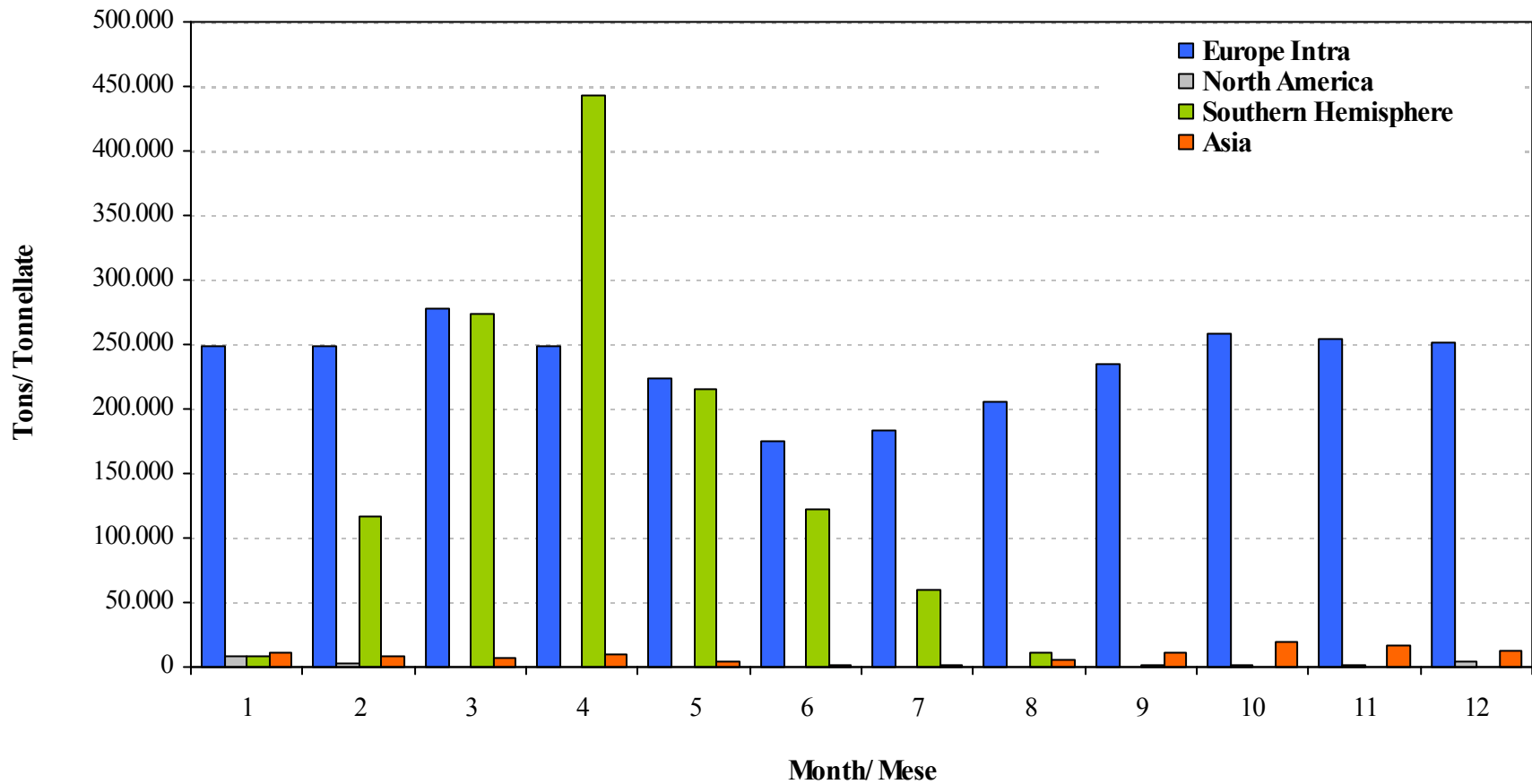
SOUTHERN HEMISPHERE: EXPORTS BY VARIETY



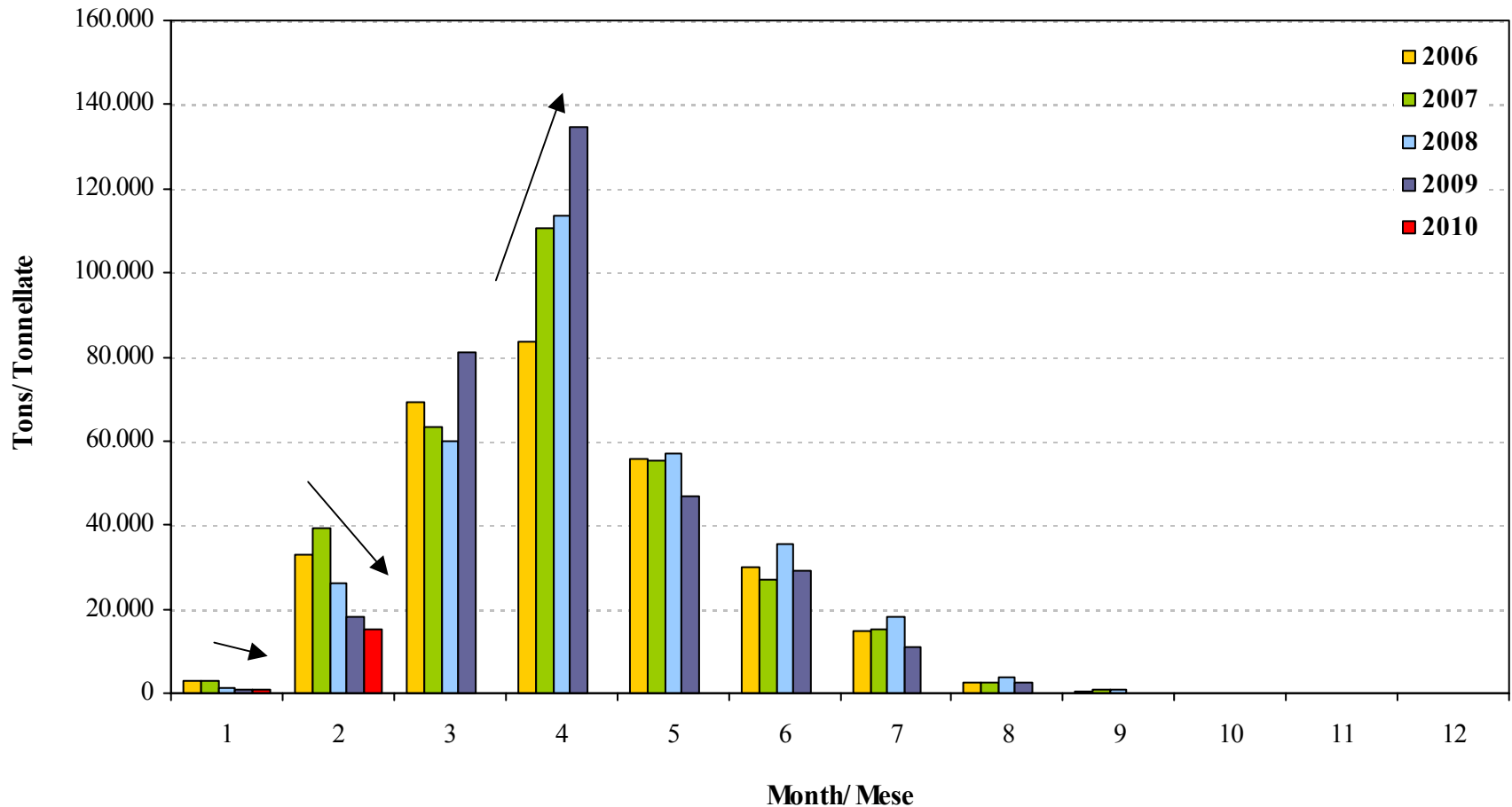
SOUTHERN HEMISPHERE: EXPORT MARKET



EUROPE: MONTHLY IMPORT (2004-2009; Seasonability)



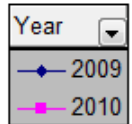
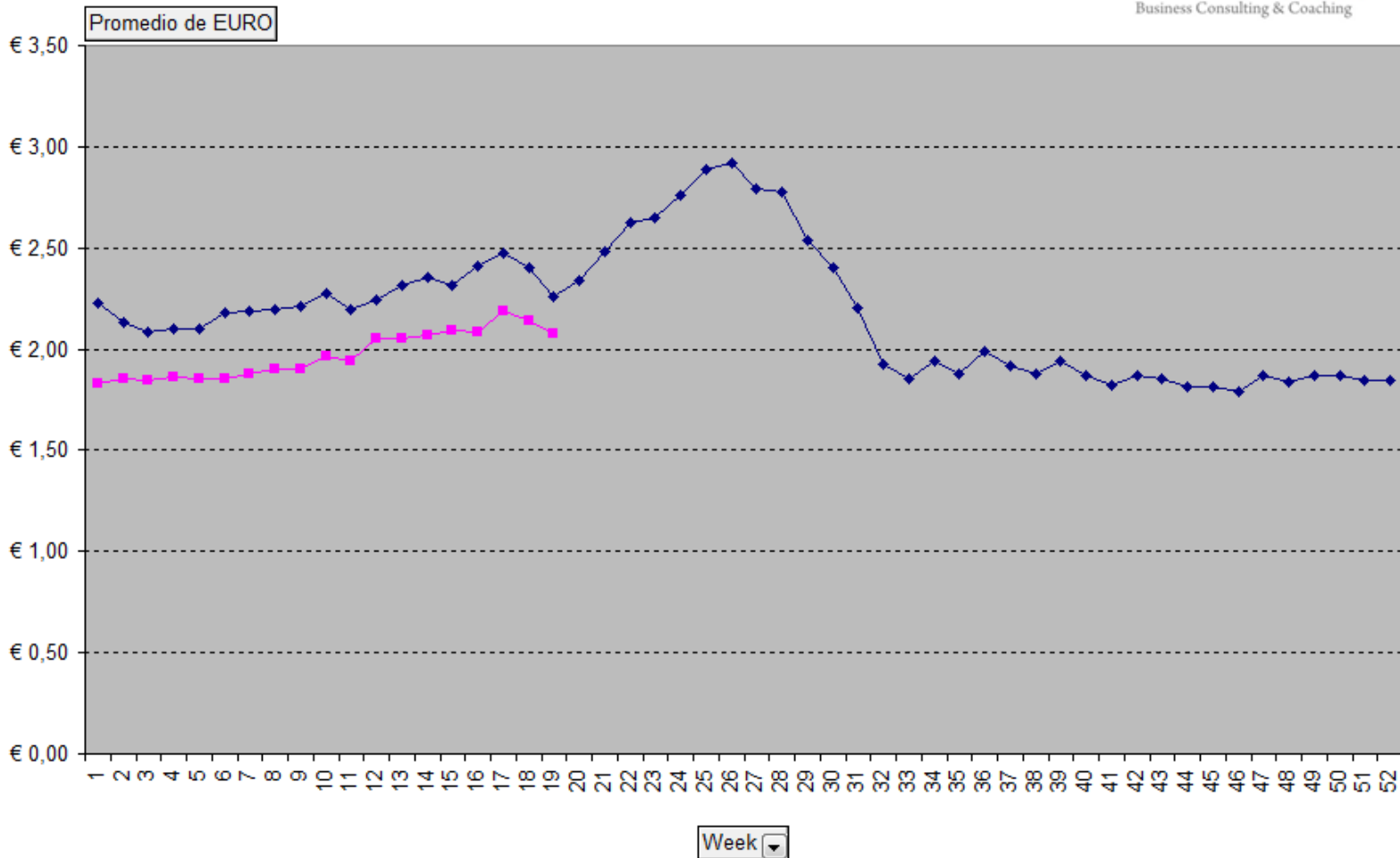
SOUTHERN HEMISPHERE: TREND IN EXPORTS TO EUROPE





PRICE RETAIL EUROPE: PERA PRODUCED IN EUROPE

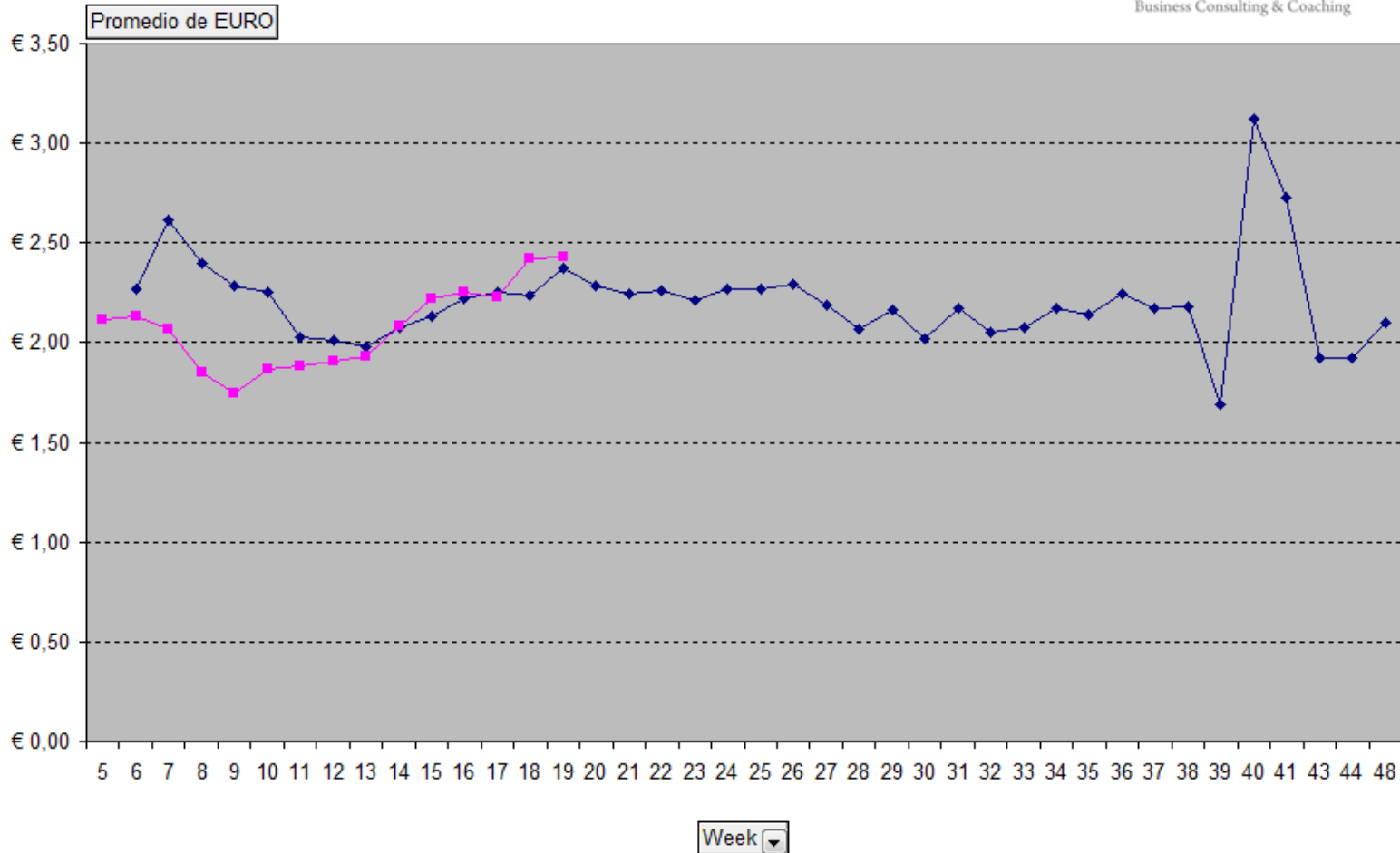
Market (Todas) Retail (Todas) Variety (Todas) Origin (Todas)





PRICE RETAIL EUROPE: PEARS PRODUCED IN THE SOUTHERN HEMISPHERE

Market (Todas) Retail (Todas) Variety (Todas) Origin (Todas)

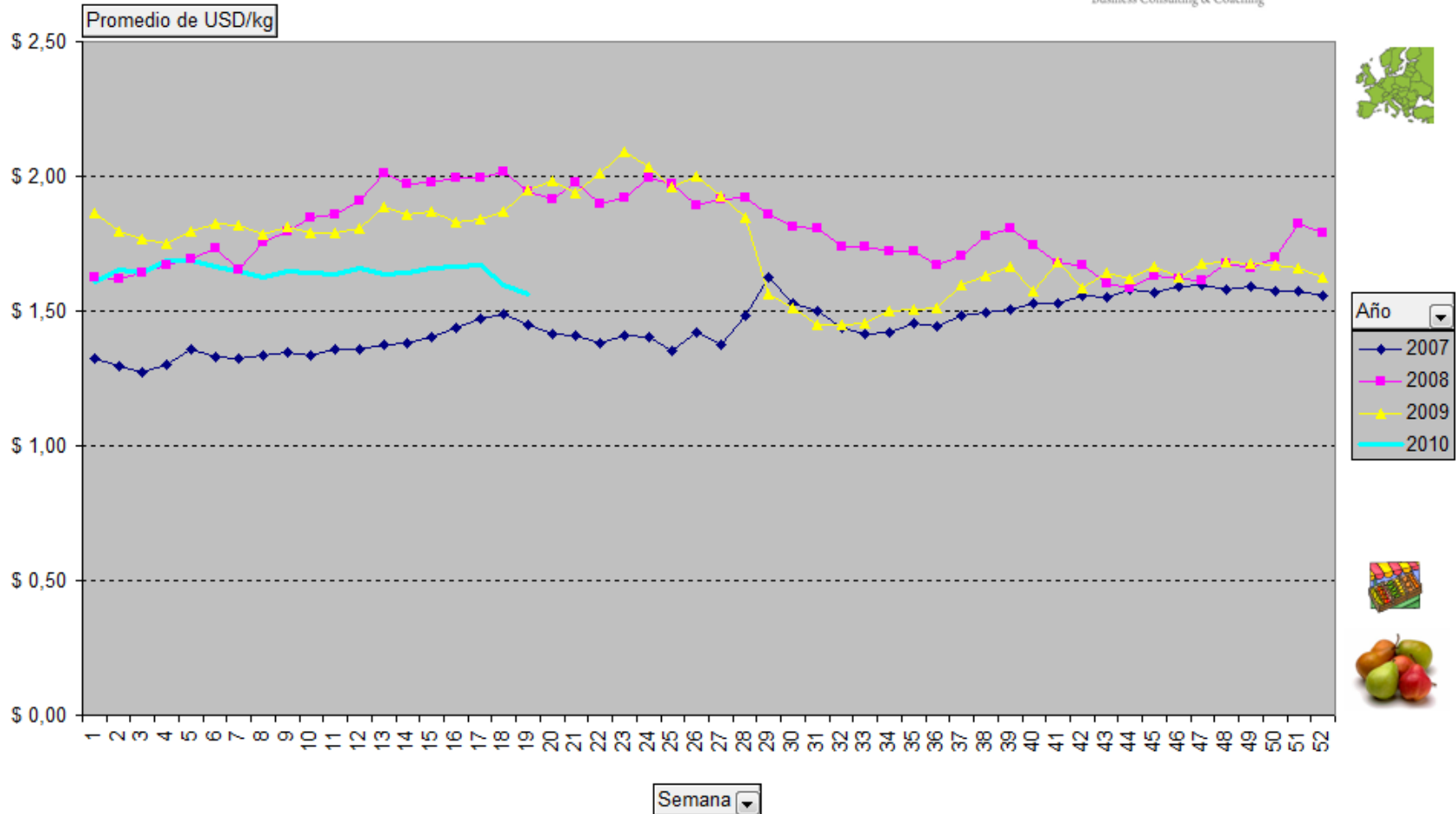


Year
 2009
 2010



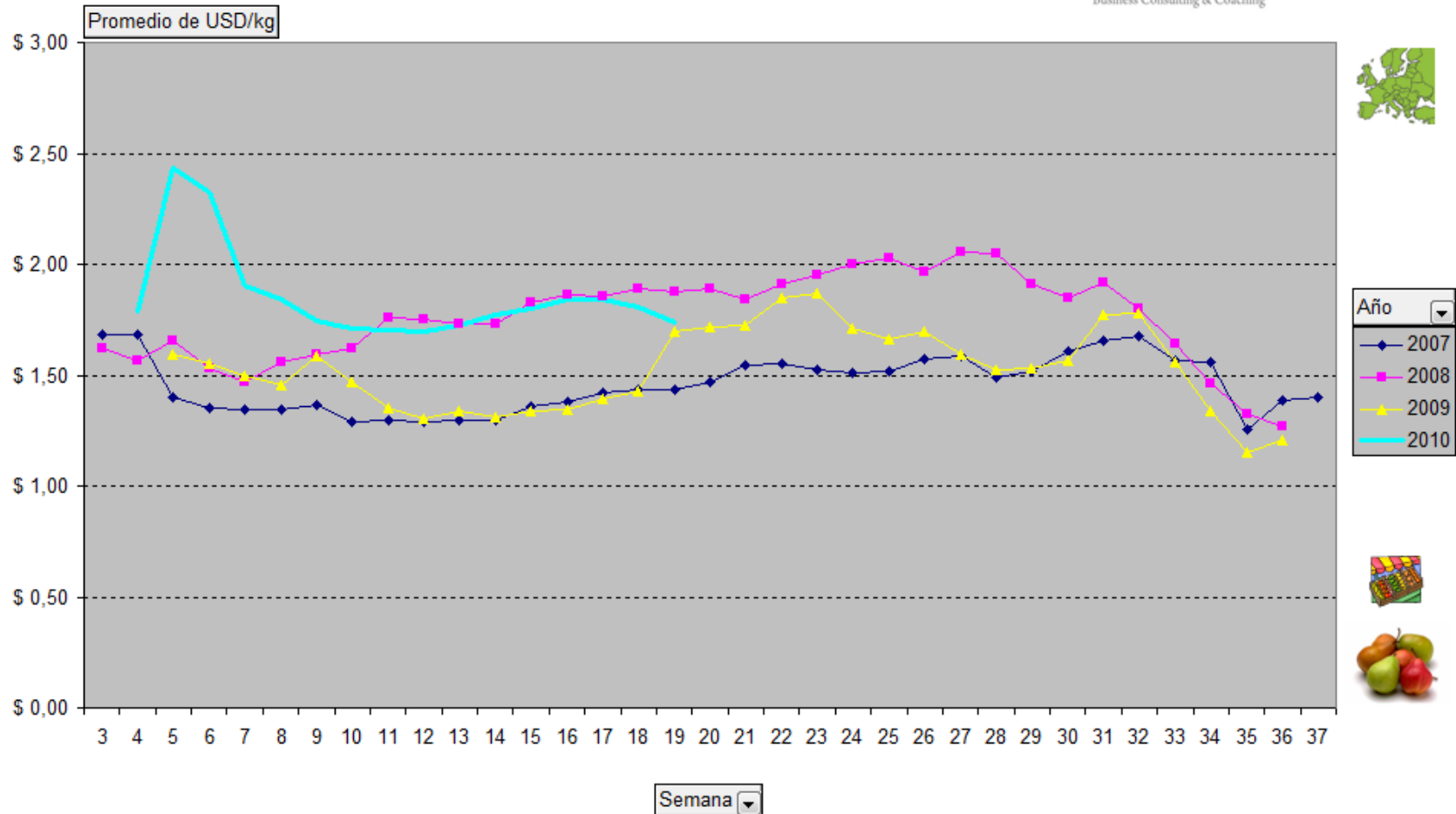
PRICE WHOLESALE EUROPE: PEARS PRODUCED IN EUROPE

(Todas) ▾
 (Todas) ▾
 EUROPA ▾
 (Todas) ▾
 (Todas) ▾



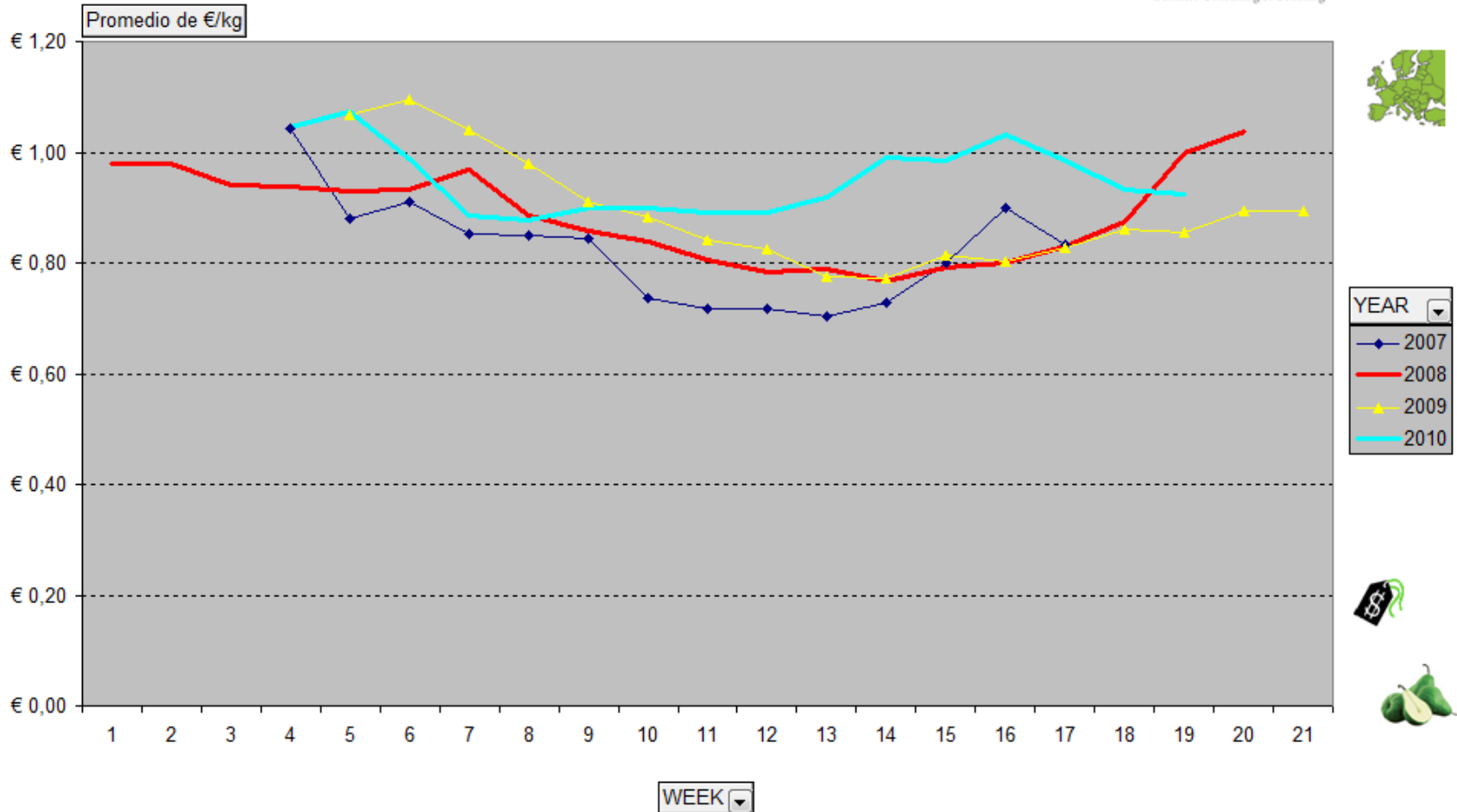


PRICE WHOLESALE EUROPE: PEARS PRODUCED IN THE SOUTHERN HEMISPHERE



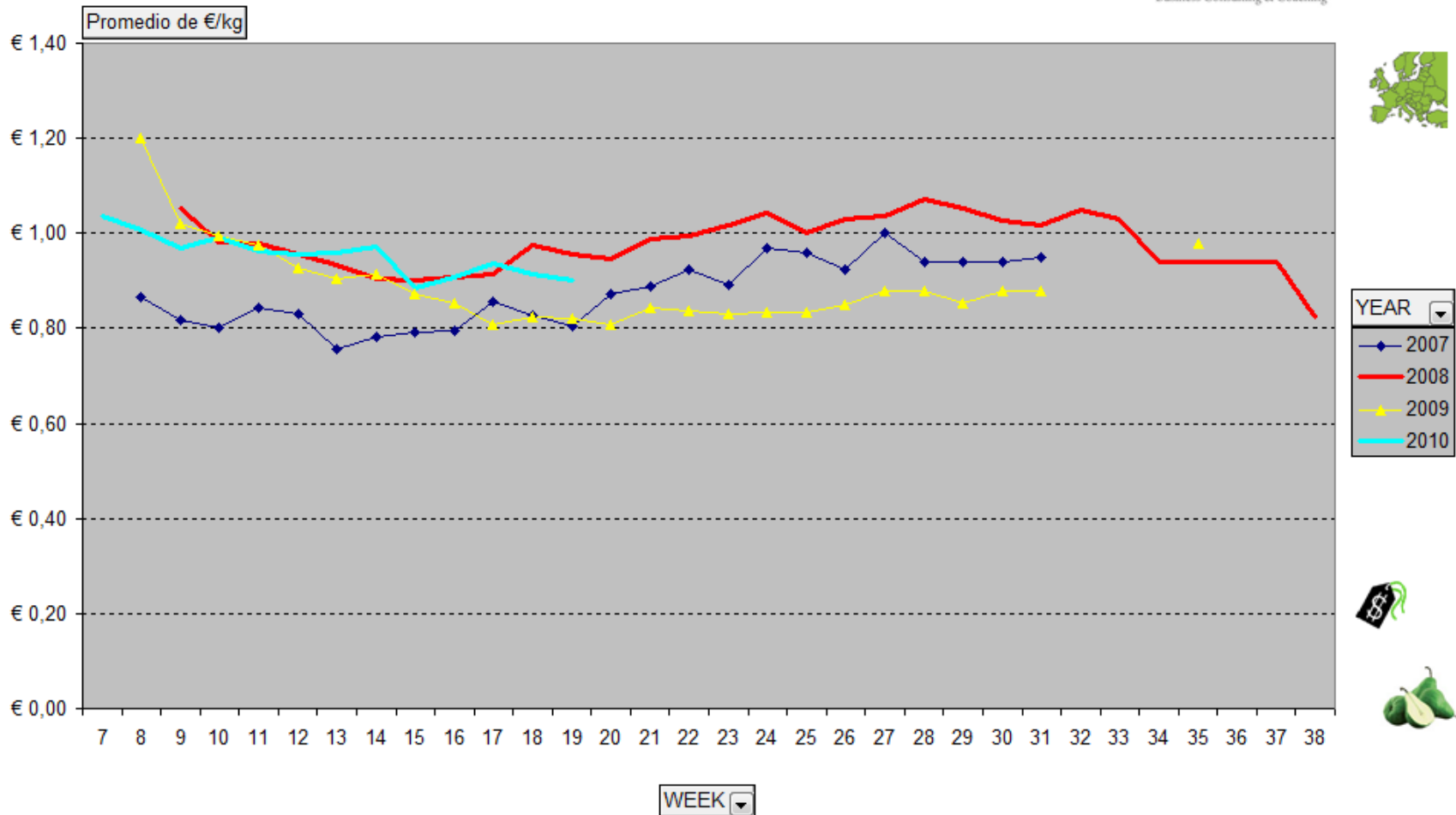
PRICE IMPORTED EUROPE: WILLIAMS PRODUCED IN THE SOUTHERN HEMISPHERE

VALUE FOT REGION ORIGIN (Todas) SIZE (Todas) VARIETY WILLIAMS ORIGEN (Todas)



PRICE IMPORTED EUROPE: PACKHAMS PRODUCED IN THE SOUTHERN HEMISPHERE

VALUE FOT REGION ORIGIN (Todas) SIZE (Todas) VARIETY PACKHAMS ORIGEN (Todas)





CHILE



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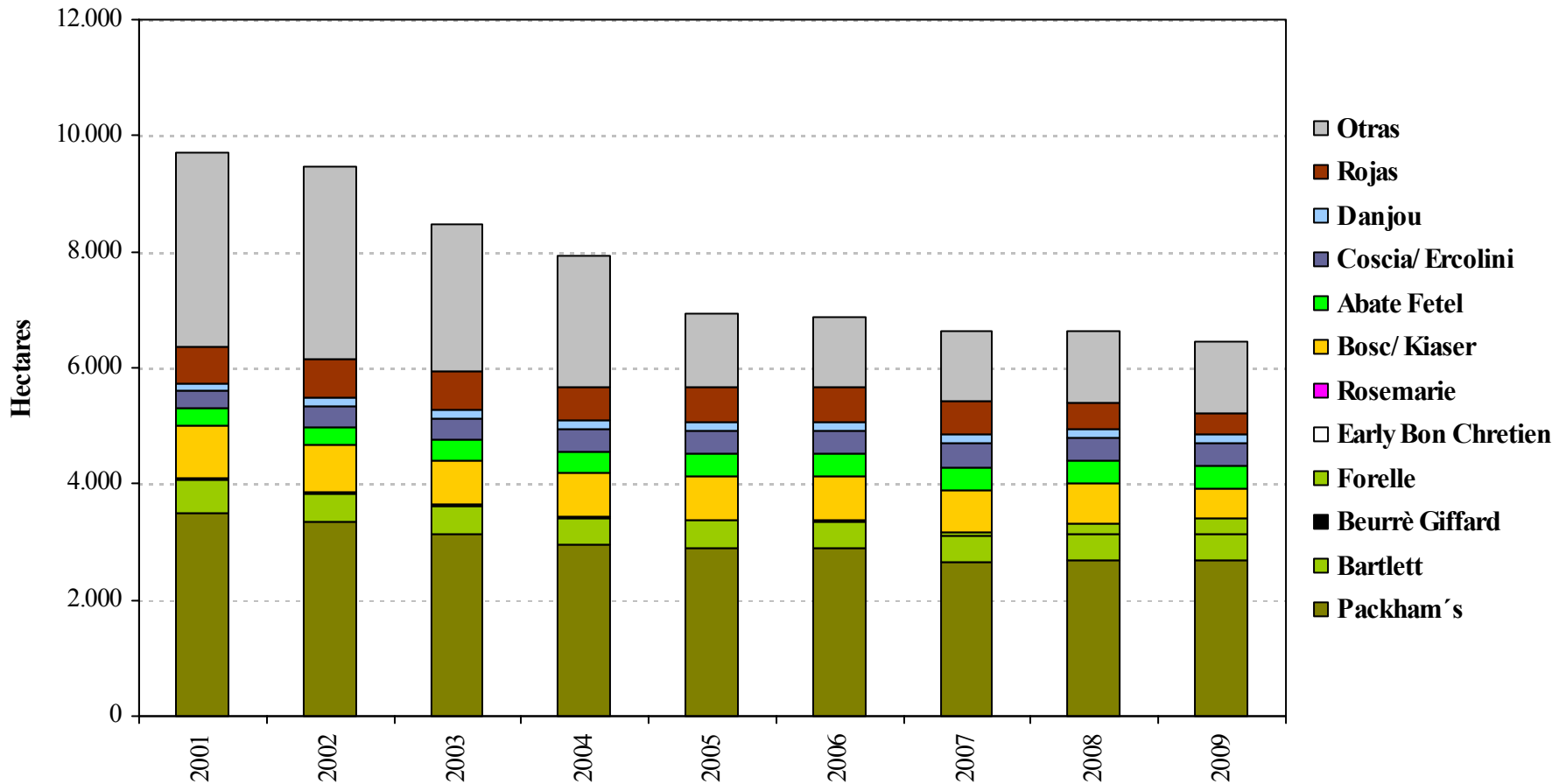
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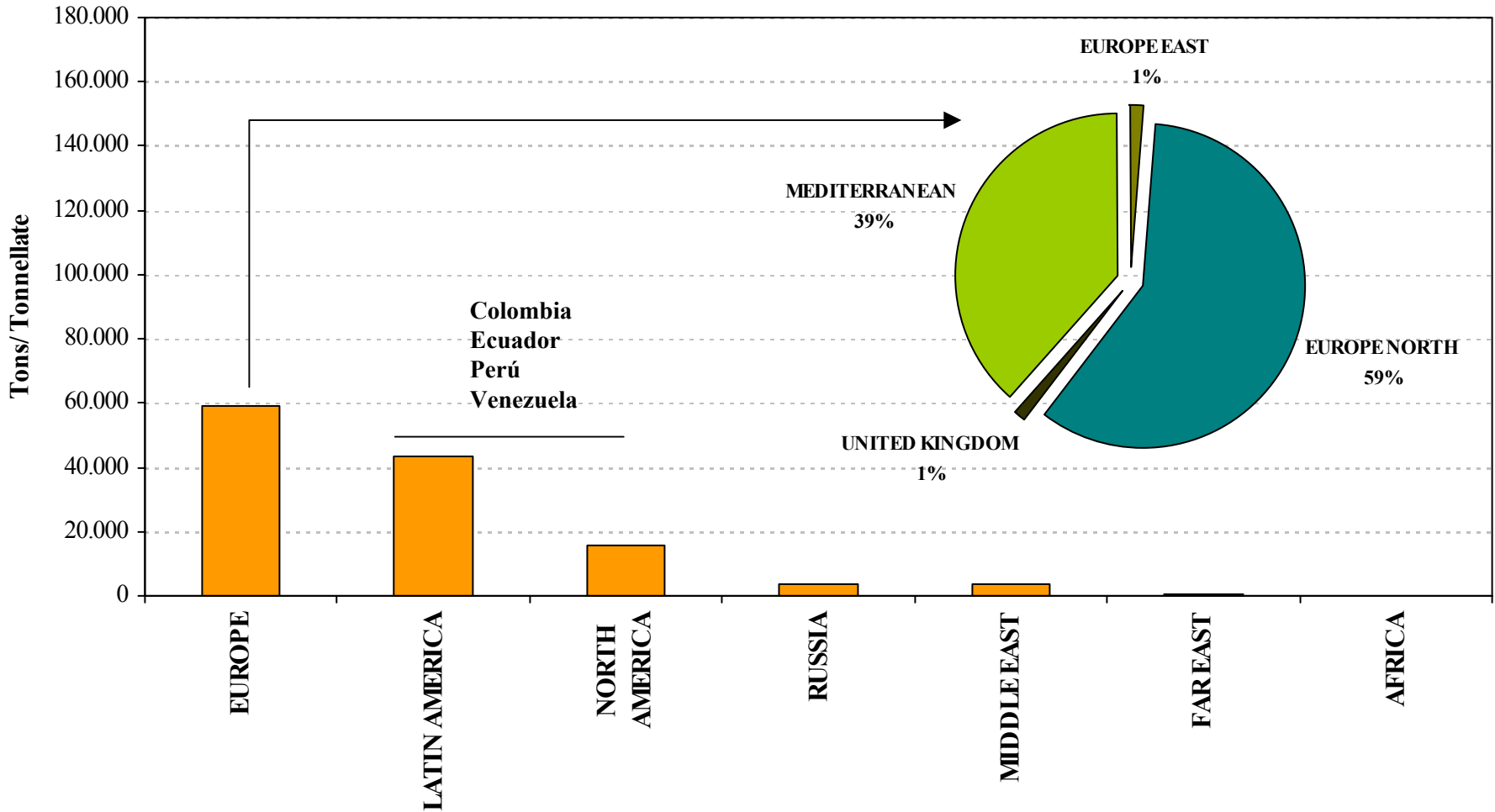


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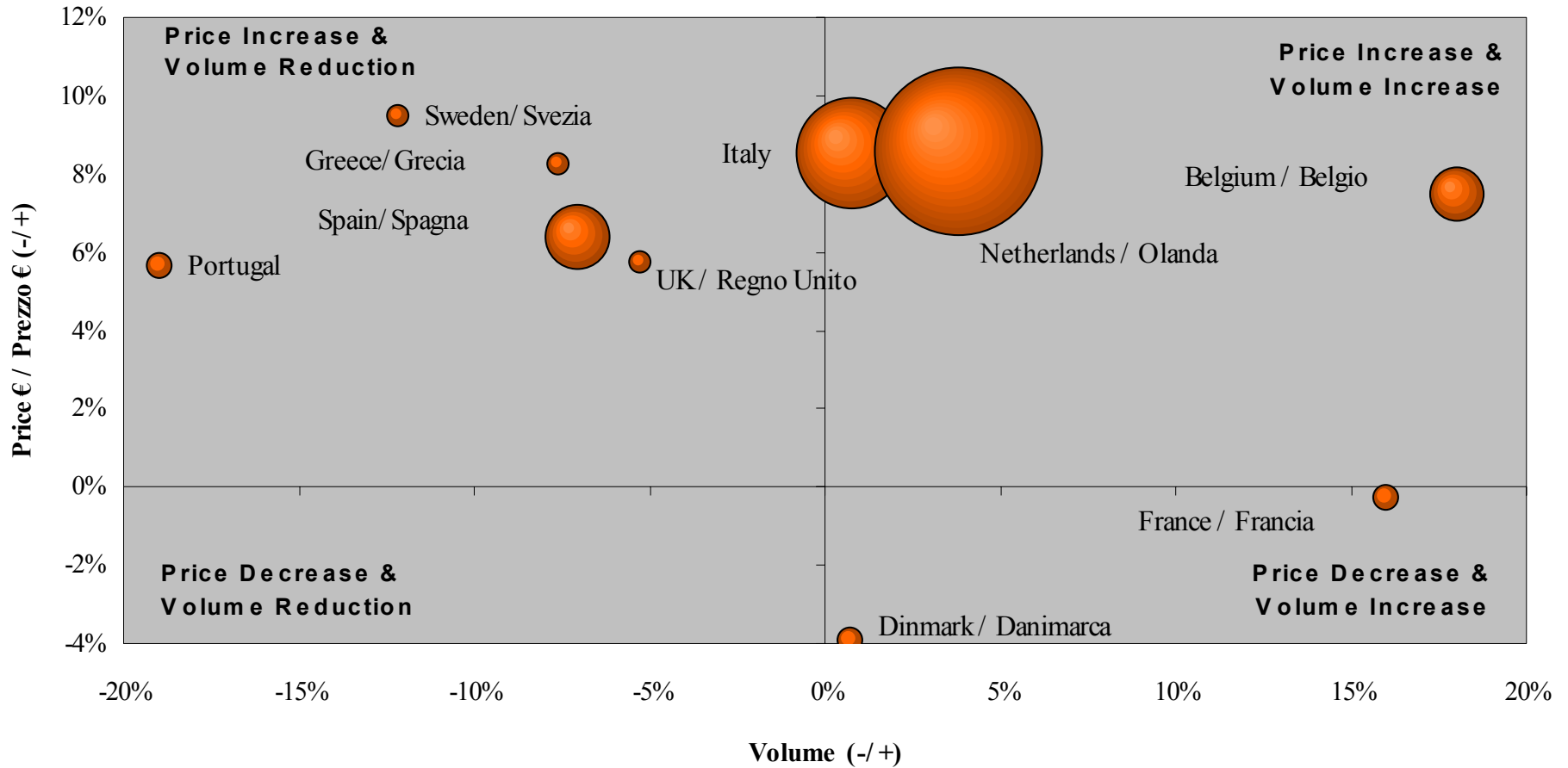
CHILE: EVOLUTION HECTARES OF PEARS (Varieties)



CHILE: EXPORT MARKET (2009)



EUROPE: TREND IMPORT FROM CHILE (2004-2009)





ARGENTINA



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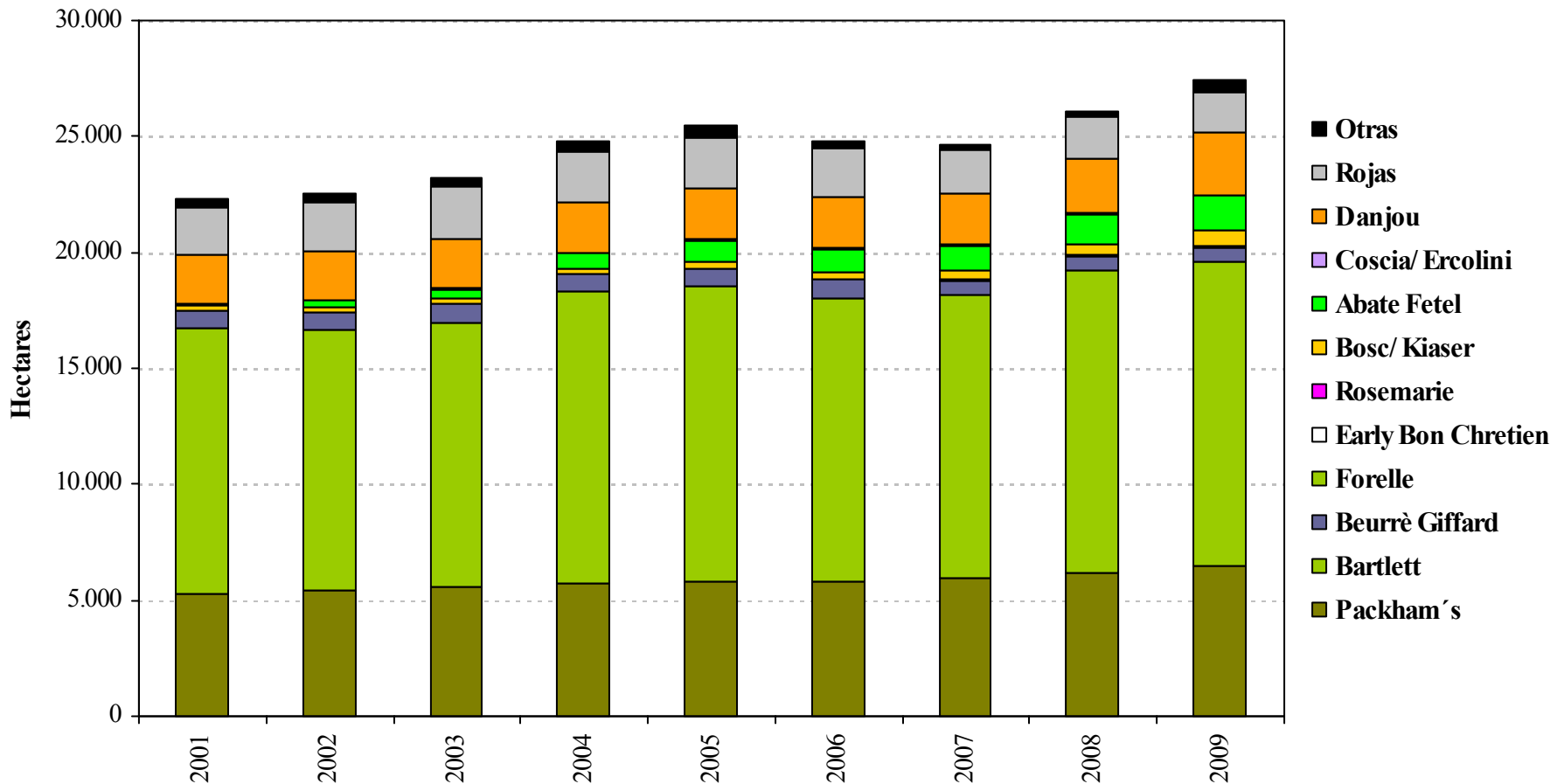
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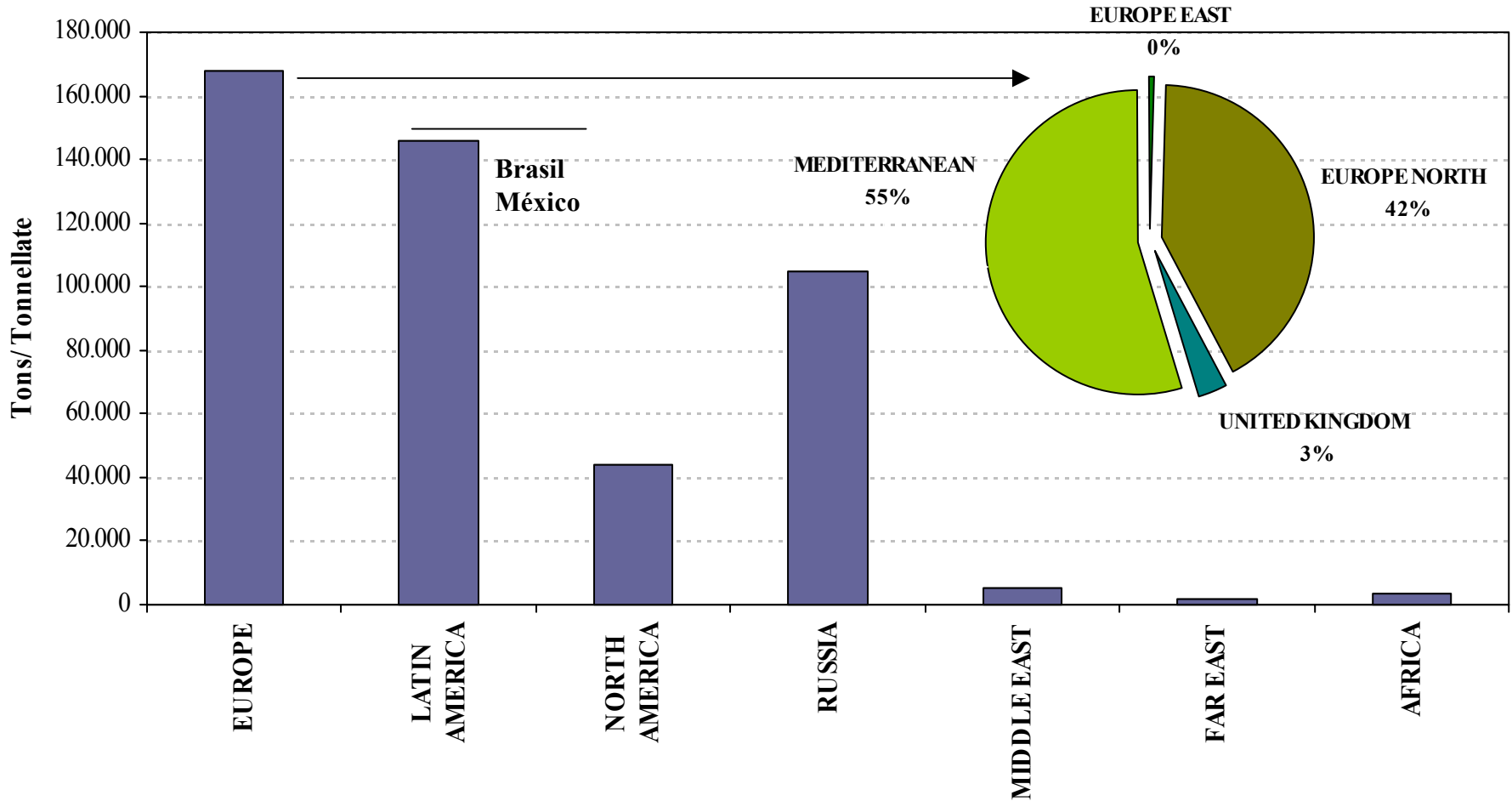


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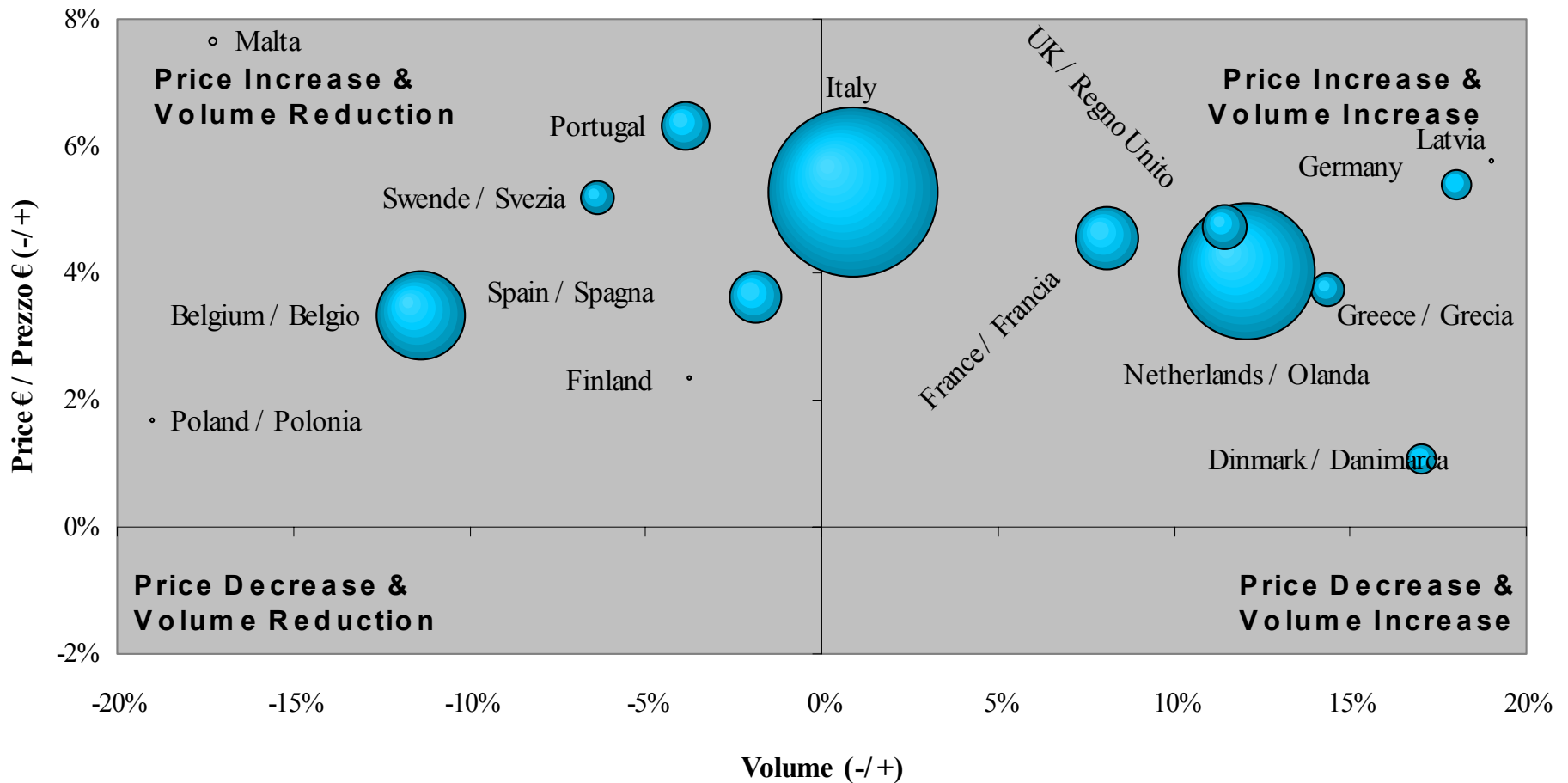
ARGENTINA: EVOLUTION HECTARES OF PEARS (Varieties)



ARGENTINA: EXPORT MARKET (2009)



EUROPE: TREND IMPORT FROM ARGENTINA (2004-2009)



ARGENTINA COMPETITIVENESS

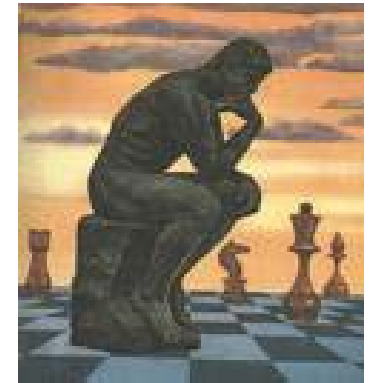
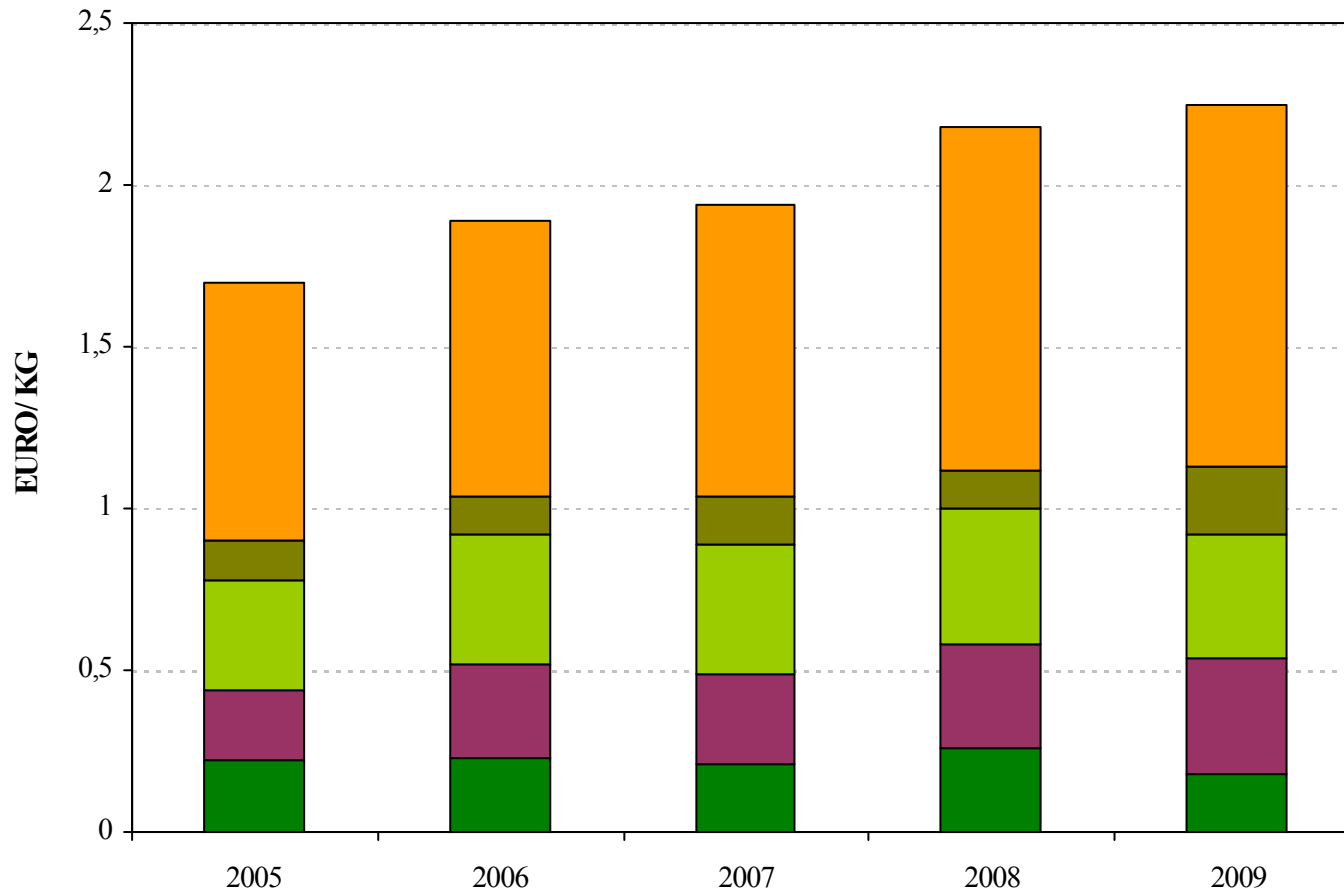
Positive

- Patagonia: region agroecological
- Environment: 40,000 hectares with pheromones (80% clusters)
- Specialization and tradition in pears
- Tendency increase in the hectares cultivated
- Safe production: traceability cluster

Negative

- Parity: euro/dollars (decrease price FOT)
- Parity: peso/dollars (increases domestic costs)
- Europe: high cost Logistic and re-packing

WOULD IT BE NECESSARY TO RESTRUCTURE THE COST OF LOGISTICS AND RE-PACKAGING?

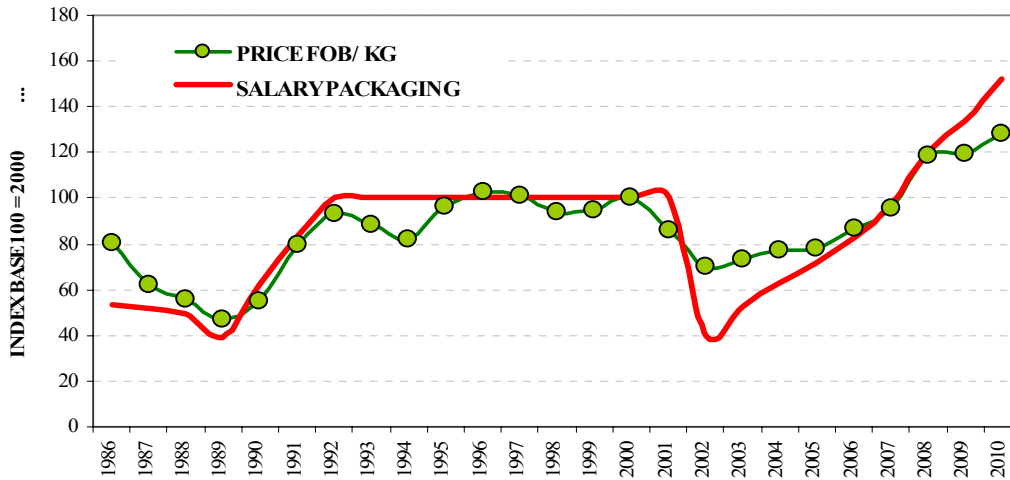


- Logistic+repacking
- Trade margin
- Expenses Import
- Packing (FOB)
- Fruit Growers

WOULD IT BE NECESSARY TO RESTRUCTURE THE COST OF LOGISTICS AND RE-PACKAGING?

(EURO/KG) PEARS OF ARGENTINA	2005	2006	2007	2008	2009
PRICE RETAIL	1,70 €	1,89 €	1,95 €	2,18 €	2,24 €
Logistic+Repacking	0,80 €	0,85 €	0,90 €	1,06 €	1,12 €
Wholesaler/Ingrosso	0,90 €	1,04 €	1,05 €	1,12 €	1,13 €
Trade margin	0,12 €	0,12 €	0,15 €	0,12 €	0,21 €
FOT / Importatore	0,78 €	0,92 €	0,90 €	1,00 €	0,91 €
Expenses	0,34 €	0,40 €	0,40 €	0,42 €	0,38 €
FOB / Exportatore	0,44 €	0,52 €	0,50 €	0,58 €	0,54 €
COST Packing	0,22 €	0,29 €	0,28 €	0,32 €	0,36 €
GROWER / Produttore	0,22 €	0,23 €	0,21 €	0,26 €	0,18 €
Grower/Retail	16,0%	15,3%	15,0%	17,4%	11,1%

SALARY PARTICIPATION IN THE BUSINESS OF PACKAGING FRUIT

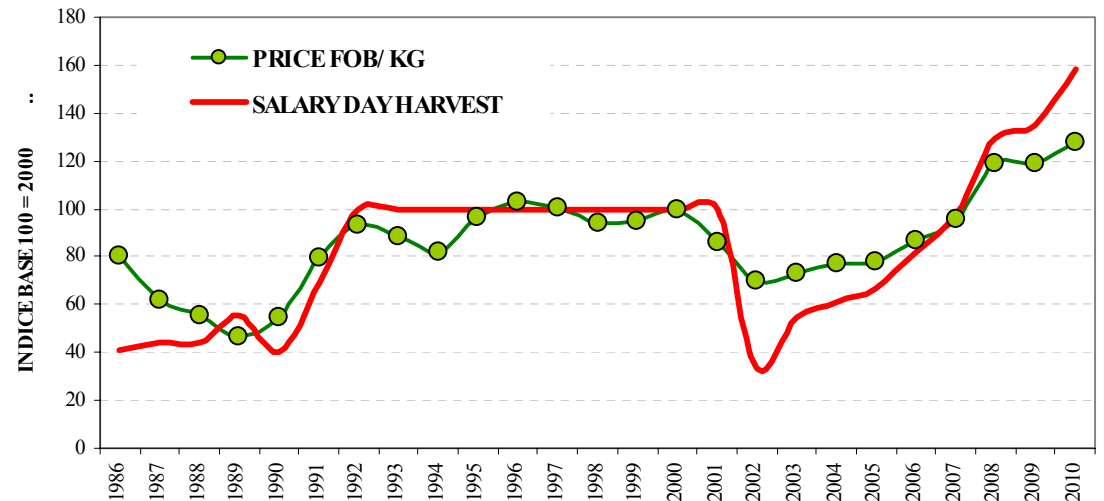


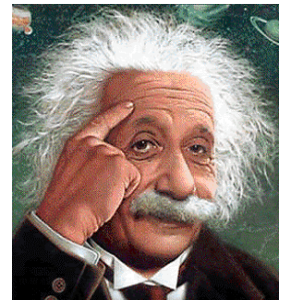
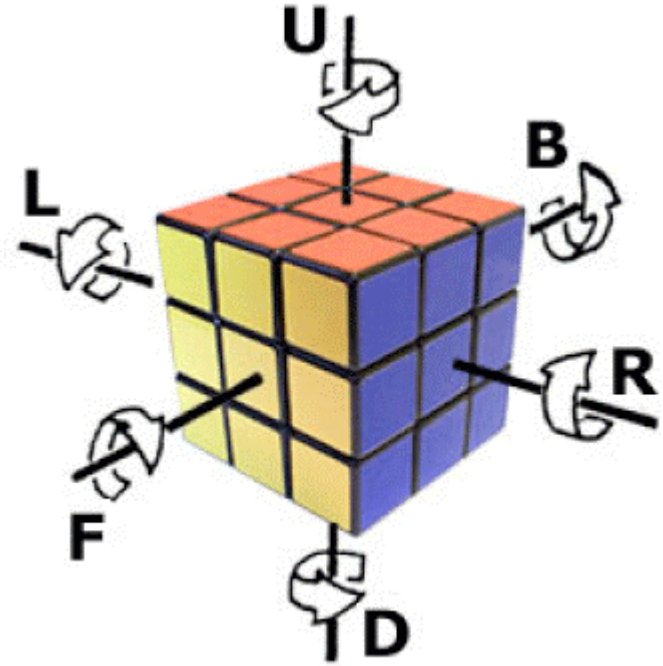
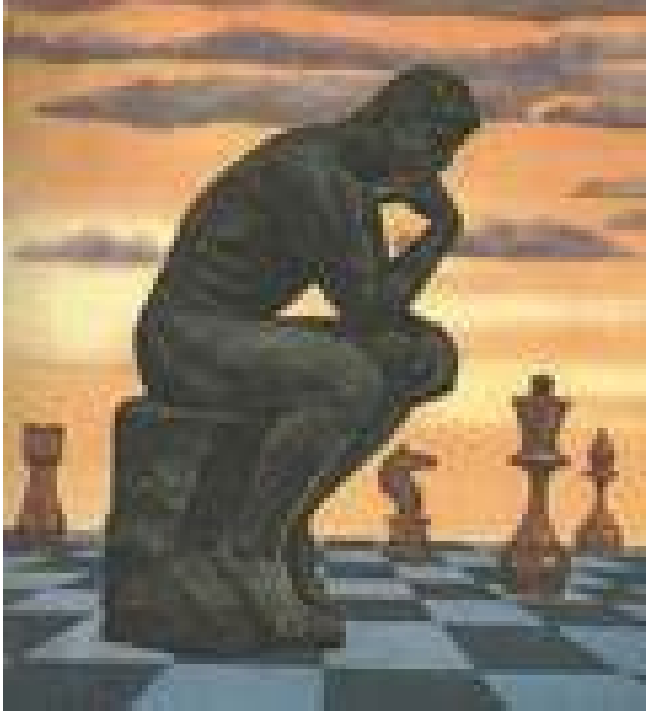
Packing

Grower

Domestic costs: manpower

SALARY PARTICIPATION IN THE BUSINESS OF HARVEST







SOUTH AFRICA



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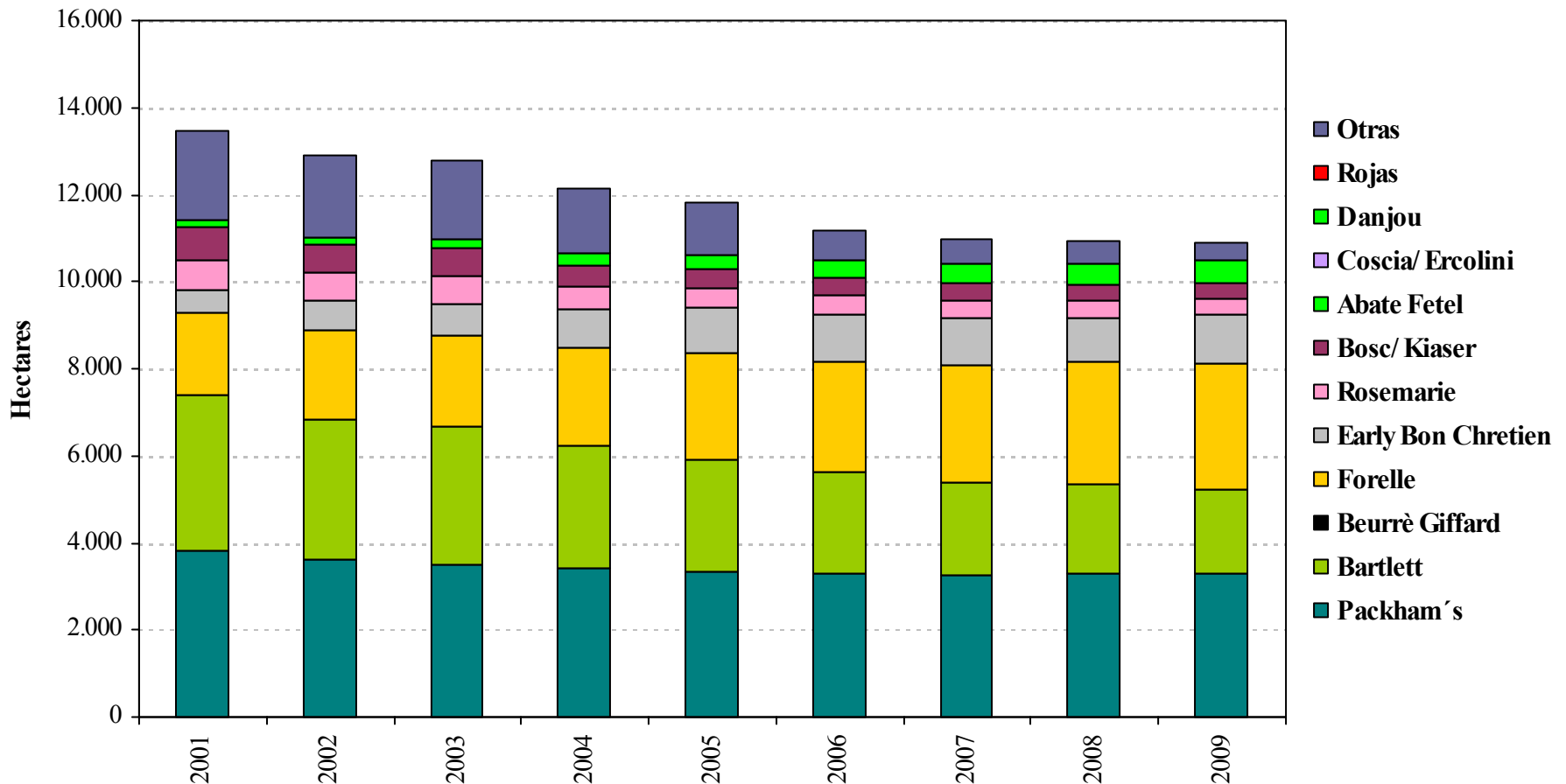
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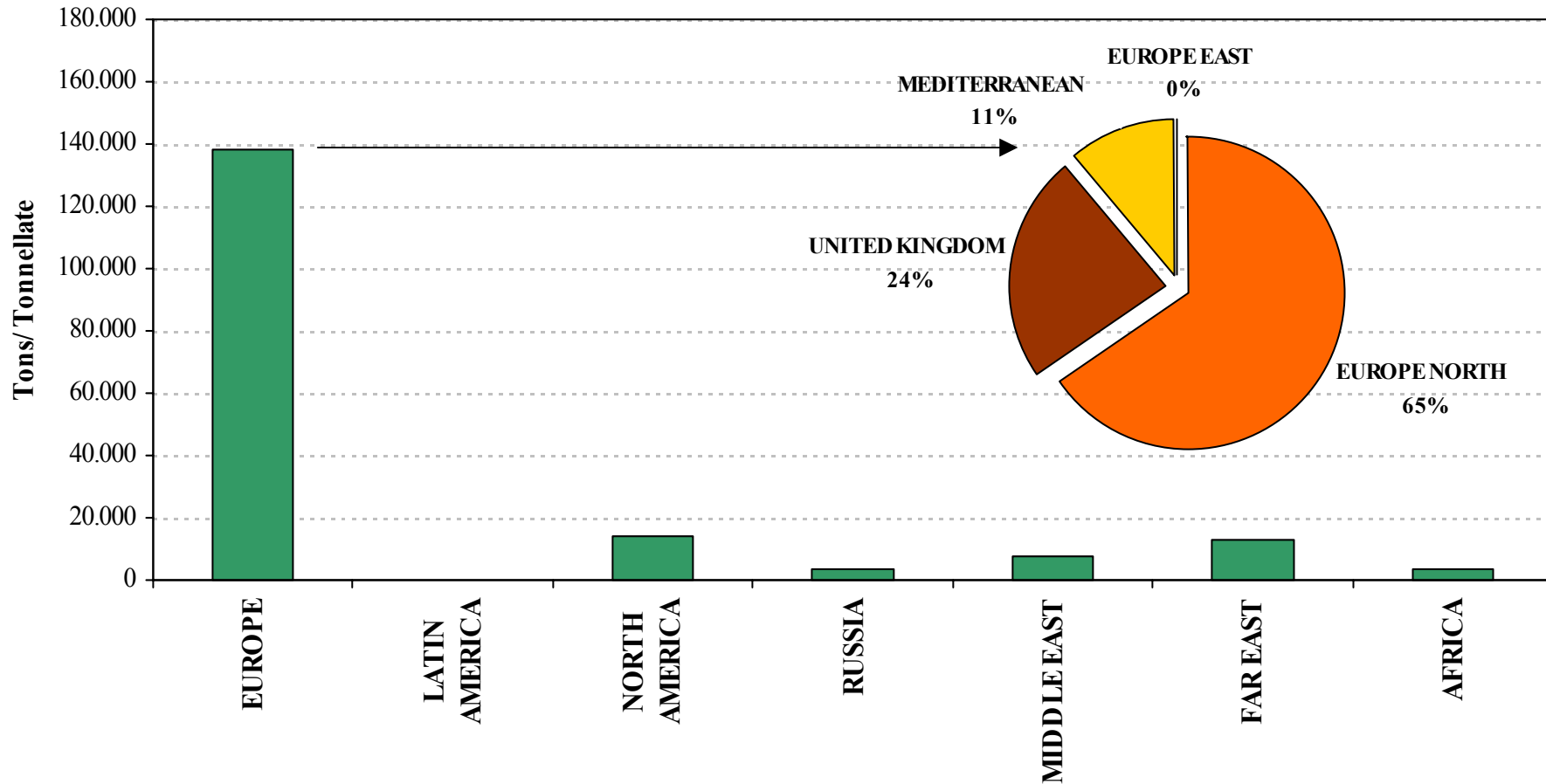


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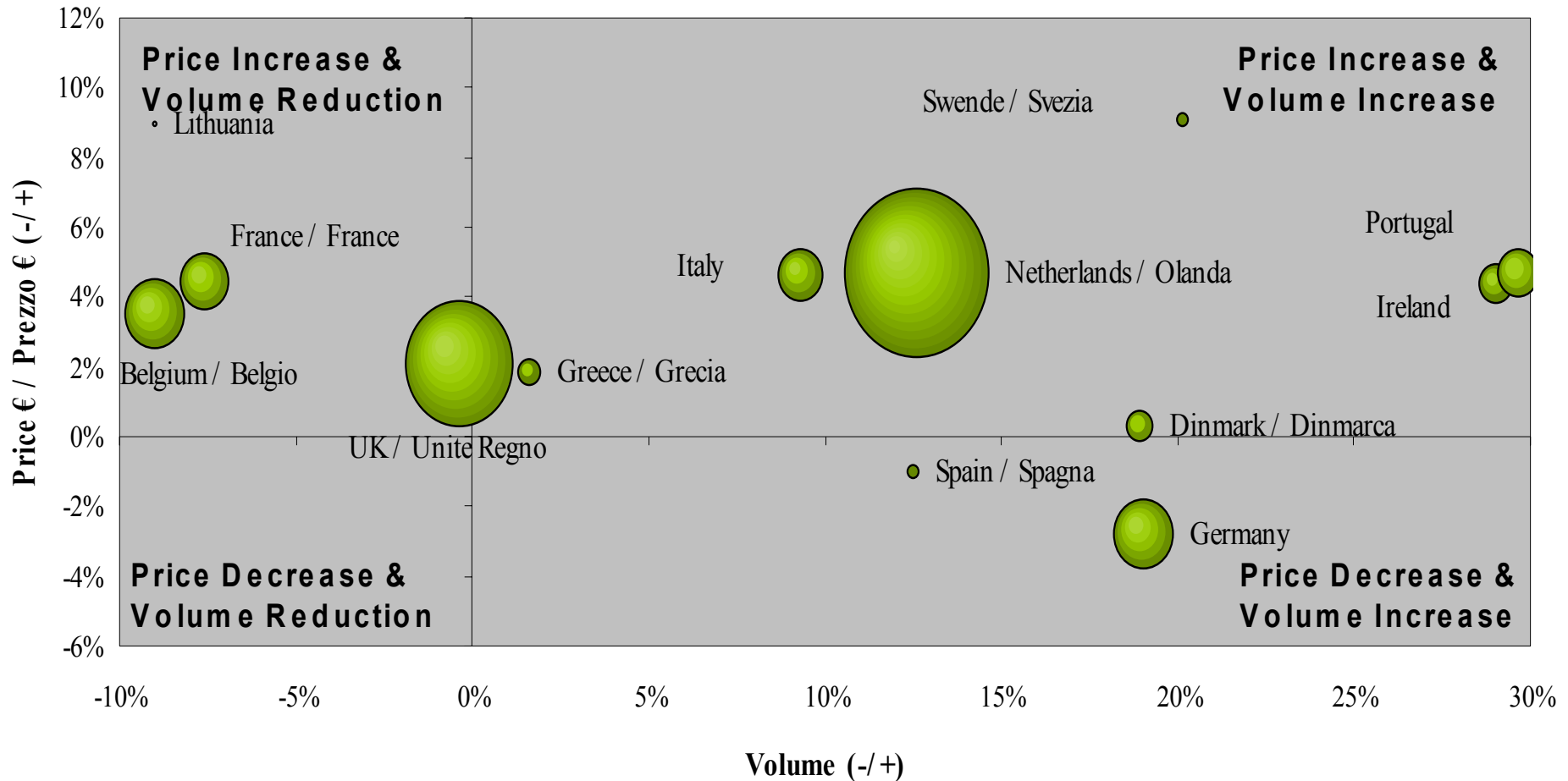
SOUTH AFRICA: EVOLUTION HECTARES OF PEARS (Varieties)



SOUTH AFRICA: EXPORT MARKET (2009)



EUROPE: TREND IMPORT FROM SOUTH AFRICA (2004-2009)





THANK YOU FOR YOUR ATTENTION



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