



Developments & Trends Effecting North America & Europe



The unstable economy in North American & Europe has reshaped the international fresh fruit and vegetable industry. Here are just some of the trends.

- ✓ Continue to see a more price conscience customer
- ✓ More focus on locally grow
- ✓ Rising growing costs
- ✓ Bankruptcies & mergers (retail, grower, whole)
- ✓ Value added (less & more)
- ✓ Reduce packaging expenses (white to craft box)
- ✓ Food safety & traceability



Top 20 North American Retailers

Rank	Name	\$Bil. (000)	Stores
1	Wal-Mart	258,500	3395
2	Kroger	77,200	4397
3	Costco	72,500	544
4	Supervalu	45,000	2491
5	Safeway	44,800	1743
6	Loblaw	31,500	1036
7	Publix	24,000	990
8	Ahold	21,800	704
9	Delhaize	19,200	1581
10	C&S	19,000	0

Rank	Name	Bil. (000)	Stores
11	7-Eleven	17,000	6142
12	HEB	15,000	310
13	Sobeys	14,900	1353
14	Meijer	13,700	185
15	Metro	11,300	767
16	Wakefern	10,600	62
17	BJ's	10,100	177
18	A&P	9,600	445
19	Dollar General	9,500	8308
20	Giant Eagle	8,000	369



North America Retail Sales

\$1,000,000,000,000

00



Top 20 retailers control 75% of sales

\$735,000,000,000



Top 5 retailers control 50% of sales

Wal-Mart	\$258,500,000,000
Kroger	\$77,200,000,000
Costco	\$72,500,000,000
Supervalu	\$45,000,000,000
<u>Safeway</u>	<u>\$44,800,000,000</u>
Total	\$498,000,000,000

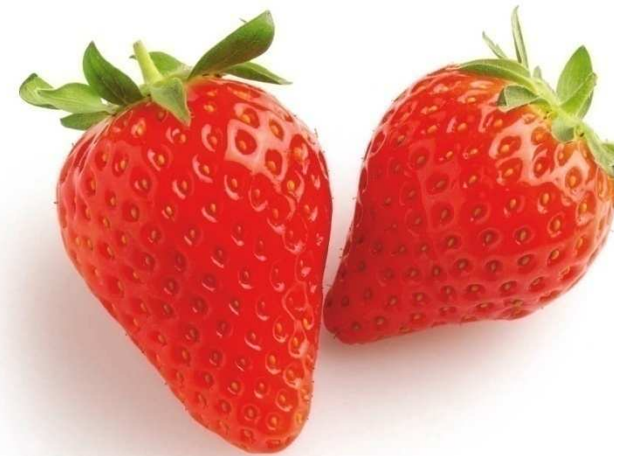


Wal-Mart Food 51% of sales

All Sales \$258,500,000,000

Food \$131,000,000,000

Fruit & Veg. \$13,000,000,000

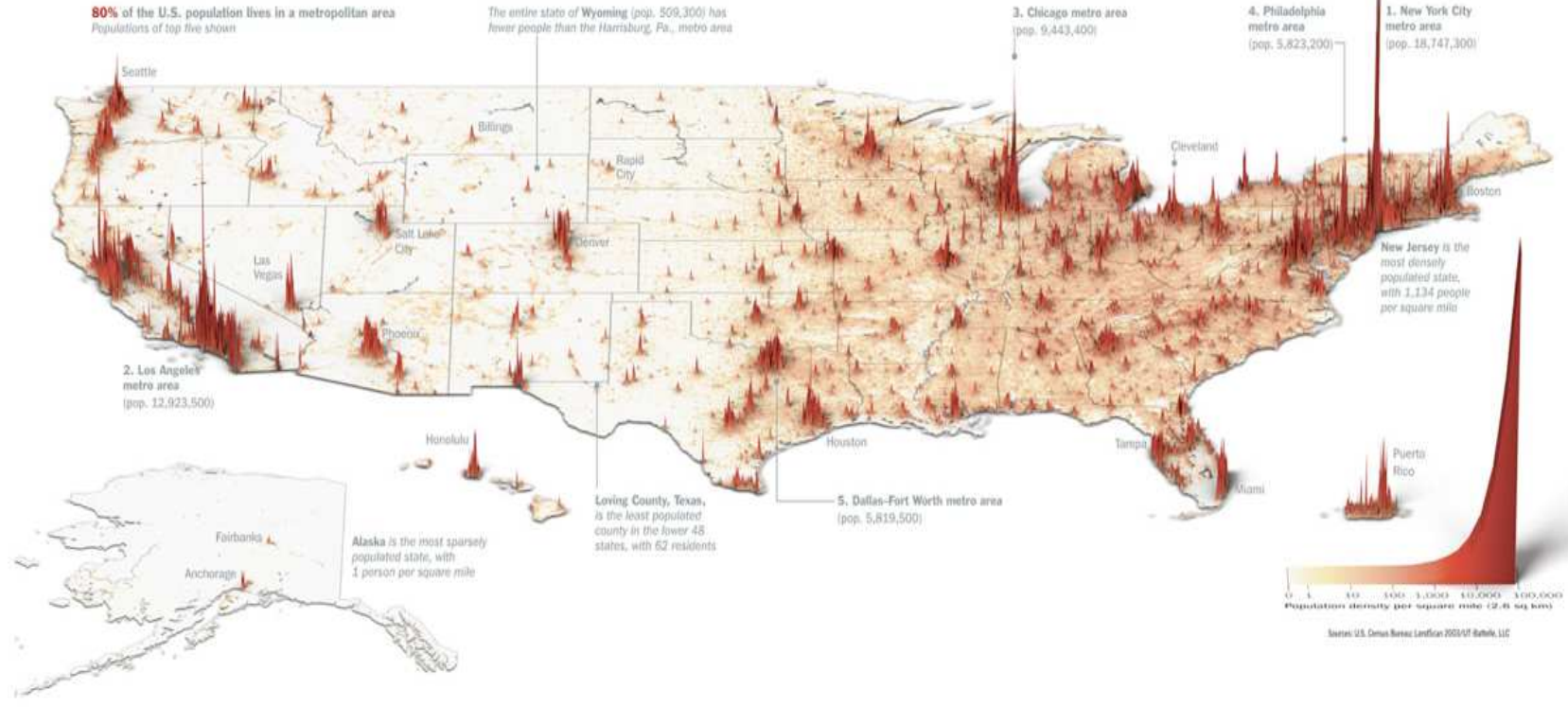


Where We Live...

Unlike many developed countries, the U.S. keeps growing. We are also moving south and west. But compared with China or India, the nation is a vast prairie

Our families are getting smaller—with one vital exception. Compared with those of Europe and Japan, the U.S. population is younger and more colorful because of the continued arrival of immigrants and their higher-than-average birthrates. Of the 100 million Americans who will join us in the next 37 years, half will be immigrants or their children. In the next few decades, 97% of the world's population growth will occur in the developing world; the U.S. is the largest developed country in the world that is still growing at a healthy clip. That matters, strategically, economical-

Ala.; Possum Trot, Ky.; or Lonelyville, N.Y. But they are all probably close to someone's idea of paradise. —By Nancy Gibbs



At least 65 percent of all winter fruit and Bananas consumed in North America enter the United States through the Philadelphia area. Why so much fruit here? Centrally located to many major markets, with second-day truck delivery to two-thirds of U.S. consumers. Delaware River ports have extensive on-dock refrigerated warehouses and a network of inland cold-storage facilities accessible to shippers.



Big “4” Retailers in the UK control 76% of Market

Rank	Name	% Market
1	Tesco	31
2	Asda	17
3	Sainsbury's	16
4	Morrison	12
5	Co-op Group	9
6	Waitrose	4
7	Somerfield	3
8	Aldi	3
9	Costco	
10	Lidl	



Top 10 European Retailers

Rank	Name	World Sales \$Bil. (000)
1	Carrefour	117,300
2	Metro	98,600
3	Schwarz (Lidl)	80,900
4	Rewe	73,400
5	Aldi	65,700
6	Auchan	57,800
7	Edeka	49,100
8	Leclerc	47,300
9	Intermarche	44,300
10	Casino	42,000



Rotterdam Fruitport, located in the Netherlands, is completely geared to the handling of vegetables & fruits. Fruitport is one of the largest clusters within Europe for 'perishables'. The location of Rotterdam Fruitport which is centrally situated between the growing areas of the Westland, the fruit importers in Barendrecht and the auctions in Bleiswijk (also know as 'the Golden Triangle') is an important element of its success. In the Golden Triangle, there are: temperature controlled storage facilities with large capacity more than 200 specialized importers, exporters & distributors & more than 50 specialized transport companies. In Rotterdam Fruitport, activities such as handling, storage, distribution, repackaging and trade take place.



The Greenery
Philadelphia, USA
Barendrecht, The Netherlands
+1 215 940 0750
j.ruta@greeneryproduceusa.com

Mexico/Tropics
anurrutia@infosel.net.mx

