



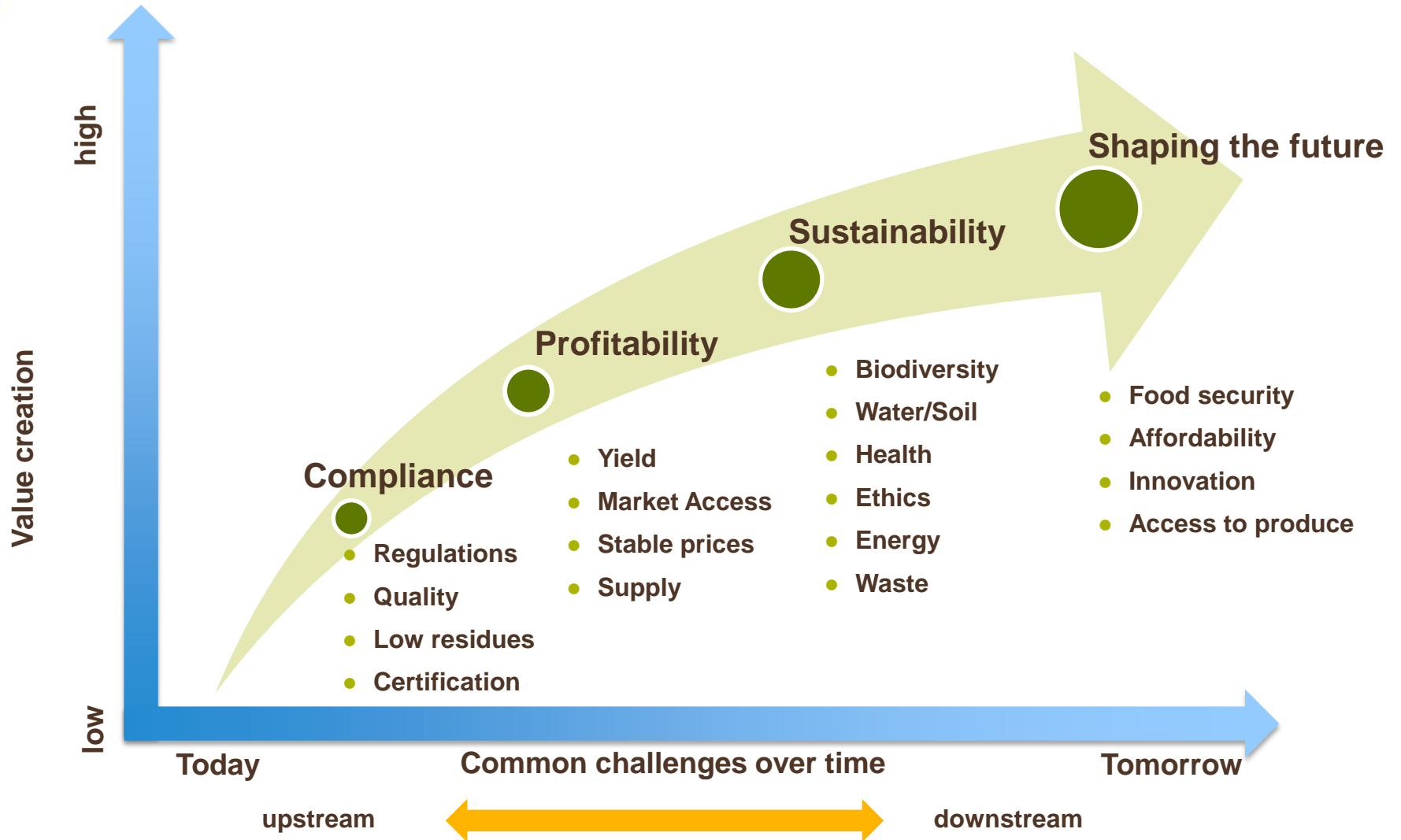
# FRESH CONNECTIONS IN SOUTHERN AFRICA

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Taking **Fresh**  TO THE **Next Level**

# Value chain actors' constraints



# A successful Value Chain



Produces and transports calories from farm to fork in most efficient way



Translates consumers needs into innovation and create value in the chain



Collaborates together to make the chain more sustainable over time



Broadens geographical scale and crop scope to extract value

**Value creation from farm to fork**

# Identify consumer preferences

## Convenience Eaters 25%

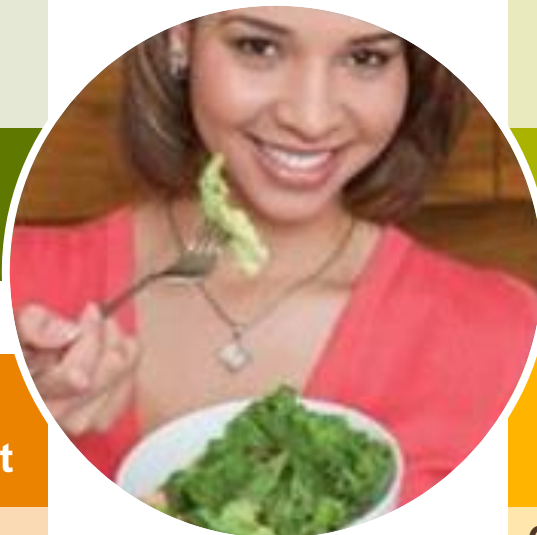
- Convenience
- Quick meals
- Pleasure, social contacts
- Low/no interest in vegetables
- No time to cook

**More often fresh cut, especially not whole heads**

**More often buy frozen vegetables, they like it pre-cut**

## Value for money eaters 32%

- Price conscious
- Value for money
- Conservative, traditional meals
- Laggards



## Adventurous eaters 10%

- Hobby chefs
- Experimental cooking
- Early adopters
- Innovators

**More often eat vegetables on the day of purchase**

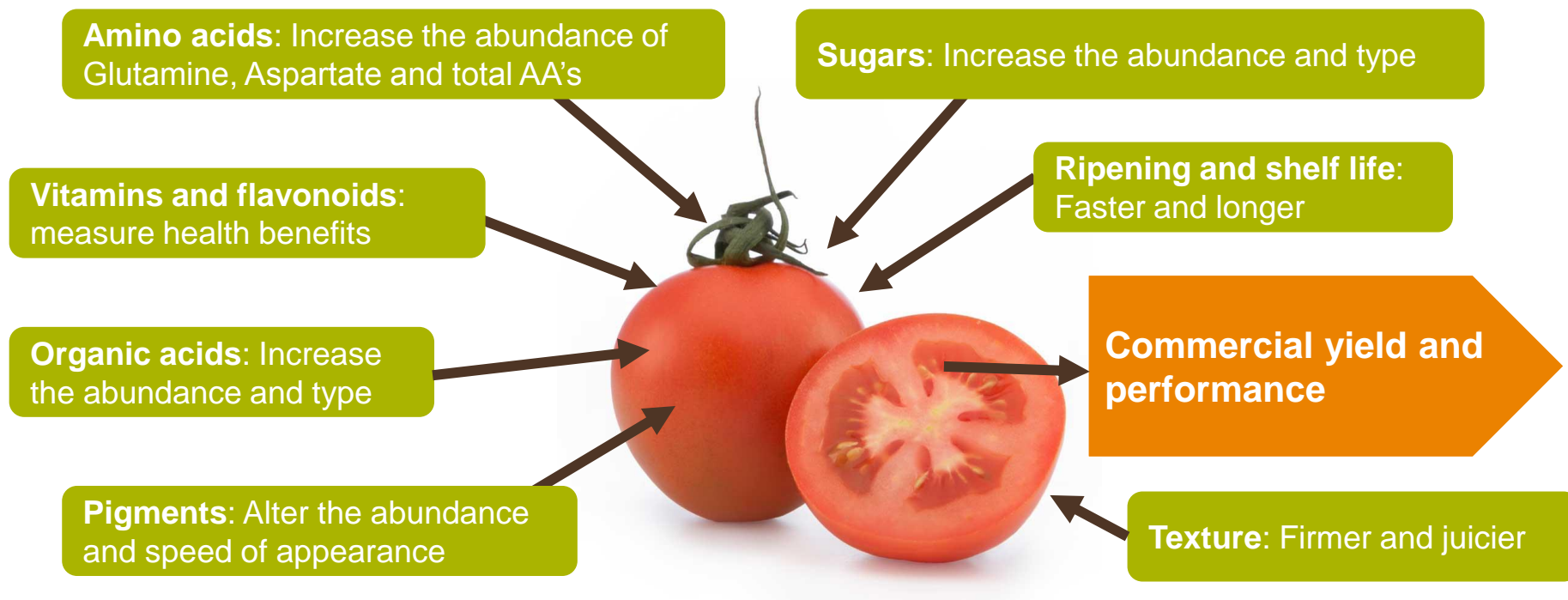
**More often eat whole head, less often buy pre-cut frozen**

## Conscious and involved eaters 32%

- Involved in what they eat
- Look after the environment
- Health conscious
- Quality food
- Home grown
- Time to cook

# Translate consumer understanding in fruit quality

Example: Aim for improving tomato



# Build the toolbox to breed desired fruit quality

## Example :

Deliver superior trait combinations; the right disease resistances and yield packages combined with traits bringing value to the whole produce chain – shelf-life, flavor, nutritional composition.



**Technical challenge:** Improve tomato quality (taste, aroma, texture, appearance) with no significant impact upon agronomic performance

Develop trait understanding

Identify molecular markers to follow useful variation; identify candidate genes and alleles



Validate in commercial germplasm

Develop new lines and hybrids

## Introduce innovation in the market



- **Kumato**<sup>®</sup> tomatoes reflect the supreme creativity of nature - drawing on our expertise of today's agronomic techniques and processes – by means of natural cultivation methods.
- Ripens from the inside outwards and changes naturally from dark brown to golden green.
- The fruits it produces are juicy and firm, with high levels of fructose with intense flavor.



- **Fascination**<sup>®</sup> a seedless watermelon meeting consumer expectation on color (red flesh) and taste (high brix 13-14 and uniform allocation of sugar in all fruit).
- Vigorous plant with good leaf cover and early ripening (get better price for the farmer).
- Attractive for retail fresh-cut

# Innovative pipeline addressing retailer and consumer needs



Tomato

Superior flavor with benchmark shelf life and yield



Pepper

Seedless mainstream pepper, color intensity and retention



Melon

High sugar combined with long shelf life



Watermelon

High fruit quality under stress, firm flesh for fresh cut



Sweet corn

Step-change in recoverable yield





# Sustainability spans many issues for growers

## “Social”

- Ethical methods
- Food safety
- Health
- Access to training
- Access to inputs
- Community



## “Environment”

- Water
- Soil
- Air
- Biodiversity
- Waste

## “Economic”

- Functional market
- Certification
- Efficient resource
- Profitable farming
- Infrastructure

# Helping farmers to become more sustainable through



## Practical tools

**Operation Pollinator**  
MultiFunctional Landscapes

Operation Pollinator • Creating essential habitat for pollinating insects to enhance biodiversity in intensive agriculture

Successful Public Private partnership with 10 years of practical experience across Europe

The quality of field margins is essential to deliver multiple benefits

Ecological Focus Areas • Targeted implementation to succeed to create environmental value and maintain farm profitability

Biodiversity enhancement requires proactive management – all over crops done

A practical and integrated approach to identify and solve multifunctional landscape issues

Assess Establish Manage

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Bringing plant-potential to life

syngenta

**Heliosec**

Syngenta's innovative on-farm water management solution

Heliosec is a simple, efficient and economical separation-based system for managing and reducing water use. The water that remains after filling and cleaning crop protection equipment is placed in a plastic-lined container. Sunlight and wind evaporate the water which leaves the residues of crop protection products behind as a dry deposit. The plastic liner is removed and disposed of at a treatment centre. Heliosec requires minimal maintenance, the disposal volume is small, and it helps farmers to assess and reduce water consumption.

Service

- On-site assessment (software)
- Set-up and implementation
- Training on BMPs

Product application process

- Transport, storage and handling
- Filling the sprayer
- Spraying in the field
- Washing the sprayer
- Disposal of washing water and re-washes

Heliosec unit

- Double-walled plastic tub, secure cage and roof
- Delivered flat packed, final assembly on site
- Holds up to 2500L and serves an average size farm
- Low maintenance

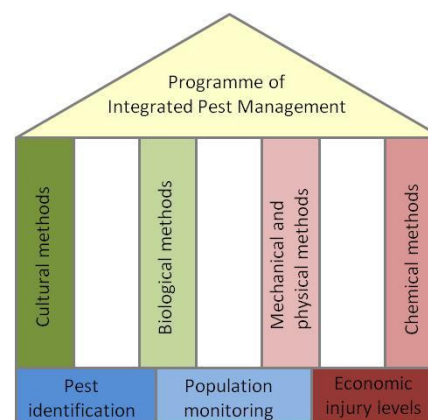
Heliosec trains farmers and helps to

- Discharge of spray tank remnants
- Clean using equipment appropriately
- Mitigate point source contamination and comply with EU legislation
- Follow BMPs and reduce water consumption

Heliosec: A safe and secure on-farm solution

syngenta

## Seeing is believing



**Interra**  
Farm Network

Interra 2012: A Successful Year Training & People

syngenta

**DRIFT RISK EVALUATION TOOL**

Field Crop

Orchards

Vineyards

European Crop Protection

TOPPS PROVIDIS

Assuring food supplies; safety, security and quality

A guide to pesticide residues

"Assuring Food Supplies, Safety, Security and Quality" is a guide to pesticide residues' aims to enhance the awareness of topics surrounding pesticide residues in food and related areas with user-to-consumer focus around the use of agrochemicals in modern crop production. The new 'Syngenta E-book' format enables you to tailor the level of information to your specific customer's demands.

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Helping to

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# Bringing it all together in our Fruit Quality Contract

## Market Context

### Growers

- Growing market access risk for fresh and processed fruits
- Increasingly complex and stringent regulatory and value chain requirements
- Looking for simplification in production

### Food Chain

- Seeking to de-risk produce sourcing
- Focused on quality and supply guarantee

### Consumer

- Expecting healthy & safe produce year around

## Fruit Quality Contract

### Offer

- Integrated Crop Protection program to reduce complexity
- Secured market access
- Match value chain requirements
- Quality Guarantee (efficacy & crop safety)
- Sustainability compliance

### Technology

- Disease and pest management chemical and biological solutions
- Responsible Residue management program
- Desired genetics

### Sustainability Services

- Increase biodiversity
- Manage wastewater

# Thank you



**syngenta**

*Bringing plant potential to life*