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ASOCIACIÓN DE INVESTIGACIÓN PARA EL DESARROLLO  
DE UVA DE MESA.

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# Welcome!





# TerraFresh

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# About Us – Frutura Companies



FruturaUruguay



TerraFresh Organics sources high-quality fruit from organic farmers in the U.S., Mexico and Central and South America, that they sell to top-tier customers in North America. The company was acquired by Frutura in 2021 and is managed by founders Greg Holzman and Steve Akagaki.

## Production Acreage:

- Grapes: 9,392 Acres
- Citrus: 6,137 Acres
- Avocados: 9,733 Acres
- Berries: 7,898 Acres
- Cherries: 3,830 Acres
- Kiwi: 848 Acres



# Chilean Systems Approach

## Our Goal:

Provide Chilean growers the opportunity to avoid fumigation via the Systems Approach and enter the US organic marketplace.



This year, through our partners Dayka & Hackett and Subsole, we were able to secure six containers of organic Chilean grapes. While the conventional market was quite challenged in the window, we were able to sell close to \$60 for every box.

## Conventional Peruvian and Chilean grapes (combined):

- 2023-24 Season: 65 Million Cartons
- 2024-25 Season: 74 Million Cartons

**We believe that there is just close to 1% of those volumes marketed organically in that window!**

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# Chilean Grapes



## Highly profitable window for Chilean Organic grapes:

Presently, there are next to no Organic grapes between the end of the Peru season and the beginning of the Mexican season.

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# U.S. Retail Market Potential



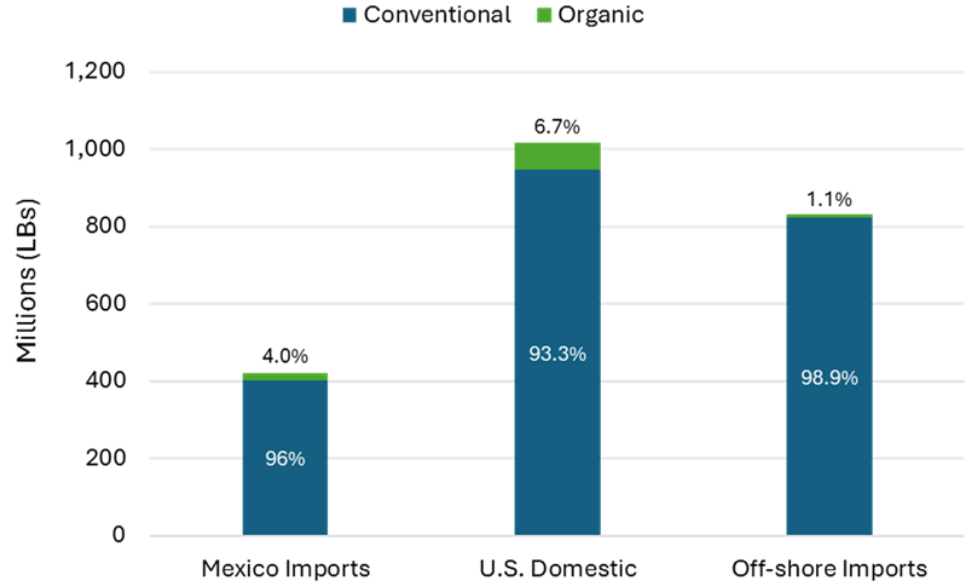
## U.S. Domestic Season

- **Organic grape volume increased +35%** between 2023-2024.
- Organic volume exceeded 68M pounds (6.7% of total volume; 9.4% of total dollars).
- **Consumers paid a 44% premium for organic grapes** (\$2.96/LB for organic vs. \$2.06/LB for conventional).

## Import Seasons

- Organic volume from Mexico was 4% of total, while off-shore organic sales made up just over 1%.
- Both reflected a sizable increase over the previous year but there is still **room for growth**.

## U.S. Grape Volume



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Volume = LBs

Source: Circana, Total U.S. MULO+, Fresh Whole Grapes (excluding Fresh Cut or Processed)

52 Weeks Total | **Mexico Import Season:** 11 Weeks Ending July 7<sup>th</sup>, 2024; **U.S. Domestic Season:** 21 Weeks Ending December 1<sup>st</sup>, 2024; **Off-shore Import Season:** 20 Weeks Ending April 20<sup>th</sup>, 2025



# U.S. Table Grape Consumers



- **Table grape buyers tend to be affluent.**
- The category is more likely to be purchased by Boomers or older Millennials with young families.
- Gen Z has the desire to purchase organic produce and in the coming years, are expected to become heavier category buyers.
- Grapes have a high co-purchase index with berries. In this category, roughly 11% of U.S. annual sales volume is organic. **The market could easily support this same level of organic development in grapes.**
- Premium fruit **consumers are willing to trade up when organic offerings are present** – especially those with young children.
- The U.S. import season is ripe for organic growth!



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Volume = Lbs  
Source: Circana Integrated Fresh Panel, Total U.S. All Outlets,  
52 Weeks Ending 05-18-25 vs. YA



# Benefits & Room for Growth



**The opportunity for growth in this area is very strong!**

If we compare other conventional produce items and the organic penetration related to those items, **1%** is an incredibly low bar, giving rise to tremendous opportunity for growth. (i.e. organic apples have a **15%** market share in the USA.) If we were to separate just Chilean grapes, organic penetration is next to nothing.



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# Thank You!

## Any Questions?



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