

OVERVIEW GLOBAL BLUEBERRY MARKET

The blueberry campaign is starting in northern countries. Eastern European growers suffered some frost damage in spring, but the general mood is still positive. In the Netherlands and Belgium, the demand is greater than the supply and that situation seems to apply to most countries. Only in the US are traders noticing the competition from summer fruit. In Latin America, growers are waiting for the start of the season, which usually takes place around September. Although the US and Europe are major markets, more and more producers are looking to reach the Middle East and Asia.

Poland expects smaller but good harvest

Frost in spring damaged the harvest. The volume will thus fall by 10 to 30% compared to last year. Producers are satisfied with the quality of the berries. The calibres are also larger. The main markets for blueberries are in Europe, with the UK, Ireland and Germany as major destinations. Additionally, exporters are finding new markets for the berries in Asia, mostly in Malaysia, Japan, Singapore and Hong Kong. "This year, we are also expecting to export to India," affirms a trader. That Polish traders are betting strongly on the Asian market is also revealed by the presence of exporters at fairs in the continent.

The demand for blueberries is rising, but customer requirements are becoming more demanding just as quickly. Supermarkets are also increasingly more focused on ethical issues.

Romania: Small producer, but growing

Although the country is still a small producer of blueberries, production is on the rise. In recent years, a number of investments have been made in cultivation. Different experts see a good future for blueberry cultivation in Romania. Most plantations currently have between 10 and 40 hectares, but there are plans for expansions to reach up to 100 hectares. The total acreage is modest, with 300 hectares; however, in the coming years, this could grow to 1,500 hectares. The fact that the sector mainly consists of small growers makes exporting to big customers difficult. Also, most of the production is bought by a single party, which also limits the possibilities.

Netherlands: Demand exceeds supply at start of season

The Dutch blueberry season has started under excellent market conditions. Growers say that they've had an unprecedented start of the season, with the demand exceeding the supply. While normally a lot of blueberries go to refrigerated chambers, these will now remain empty. According to the growers, this could lead to extreme shortages later in the season. Just like Dutch producers, the countries that hit the market before the Netherlands suffered frost damage. As a result, there were no stocks and Dutch blueberries arrived in an empty market. The production volumes in the Netherlands are consequently also lower. Due to the extremely hot weather, many early species have certainly undergone an emergency ripening. The shortages are so great that blueberries have even been flown from the United States, but according to the Dutch, there are doubts about the quality of these.

While the growth of blueberry sales in supermarkets has stood at around 20% for years, the pace has now slowed down and sales rose by 12% last year. Growers expect the ceiling to this growth to be reached some time. Another challenge is finding enough seasonal workers to pick the berries. The economy is so good that people have many alternatives. Growers wonder where they'll be able to find the necessary labourers.

Belgium: Small volumes due to hot weather

The season has started in Belgium, but the volumes are smaller than expected. The warm weather of the past few weeks caused the berries to ripen very quickly, but the sizes didn't develop at the same pace. This results in smaller blueberries and fewer kilos available.

The domestic production is supplemented with imports from, among others, Portugal, although these volumes are smaller. The Polish season is starting slowly, but also with smaller volumes than usual. Large volumes are expected only in week 31. Besides, there are also imports from Romania.

France: Shortages since mid-June

Since mid-June, the market has been suffering blueberry shortages. Traders see the demand rising across Europe, but the supply is also increasing rapidly. A retailer says that prices were already low before this period of shortages.

Spain: Large harvest, little labour

A significant increase in production, the low prices paid and a shortage of pickers have been the most determining factors for the season in Huelva, which is nearing its end. The acreage in Spain has increased by 30% and stands at 2,538 hectares, which is almost half of the acreage devoted to strawberries, with more than 5,000 hectares. The volume has grown by 60%, with the harvest having been especially notable in April and May. Statistics for June show that 33,000 tonnes were traded in that month; however, prices fell by 27%. There was an almost empty market between February and April, since the Chilean campaign came to a close earlier.

Since the second week of May, production has increased, among other things, due to the higher temperatures, which resulted in the volume harvested in three weeks being similar to the one usually harvested in 5 weeks. As a result, prices were under pressure. It was also difficult to find pickers in this period. The shortage of labourers is a serious problem for companies in Huelva this year. Since the blueberry harvest coincides with those of strawberries, raspberries, citrus and early stone fruits, there is a lot of work for very few people. Companies are investing in machinery, automation and storage facilities.

There are still many plantations in Huelva that are not yet fully productive, so production in Huelva is expected to increase in the coming seasons. However, the expansion of the acreage seems to have reached some stability. Europe and Scandinavia are the main destinations for Spanish blueberries. Asia and the Middle East are emerging markets.

Italy aims for year-round production

The season has started in Trentino with the harvest at a large cooperative. It is unclear what the extent of the frost damage, recorded earlier this year, will be. "On average, we expect the production to fall by 10%, but there are growers who have lost everything," explains a trader. As for the quality, growers are satisfied. The season lasts until mid-October. In recent years, investments have been made in new varieties, but also in cultivation further south in Sicily and Calabria. These expansions have made it possible to extend the season and are motivated by an ambitious plan to allow Italy to grow blueberries all year round.

Greece: Harvest volume reduced by heat

The Tripoli and central Peloponnese region are facing problems due to the high temperatures recorded. A grower tells us that a smaller volume is expected because of the heat. The harvest kicks off in July and continues until August. The same grower affirms that exports will be impossible this season due to the smaller volume. Most of the demand comes from the larger cities.

Australia has sights sets on China

The season runs from June to April. The market value (farm gate) stands at 120 million Australian dollars (81.6 million Euro). The domestic market absorbs 75% of the production. About 10% is exported to Asia and Europe, and the remaining 15% is devoted to processing, with most of it being frozen.

Last year, the country had the largest harvest volume ever, with a total of 11,000 tonnes. As a result, growers increased their exports, especially to China, where the market is growing quickly. Although it is still early in the season, it is said that both the quality and the prices are good.

Stone fruit competes with blueberries on the US market

With the start of the harvest in British Columbia, volumes increased on the market. A California-based trader confirmed this trend. The harvest has also started in Oregon, Washington, Michigan and the Midwest. Meanwhile, the season is coming to an end in Florida, Georgia, North Carolina and California.

The demand for blueberries is good, but the market is feeling the impact of competition from other summer fruits. Given that berries are available all year round, consumers are currently more drawn towards peaches, nectarines and cherries.

Canada: Harvest has started in British Columbia

The harvest in British Columbia has only just started. Because of the cold winter, the harvest kicked off two weeks later than usual. "All regions have started later this year, but it is actually a rather normal year. This is how it should be," affirms a trader. Blueberries are not affected by cold winters, according to traders, so the quality is very good. Volumes are about 20% lower than last year. Accurate figures are difficult to estimate, because the season has only just begun.

Mexico sees opportunities for exports in Europe

It will take until October for the season to start. Although the largest volumes are intended for the US and domestic markets, there is also room for exports to Europe. Even though there is an overlap with the seasons in Peru, Argentina and Chile, those countries focus on other markets. The US is a good market with a huge demand.

Argentina hopes to enter China

Investments have been made to improve the sorting of the fruit. The aspects they want to focus on are the size, colour, firmness and defects. The season starts in September and lasts until November. As regards exports, there are plenty of opportunities overseas. A trader explains that they exported their first batch by sea last year. The results were so good that more volumes are being shipped this year. China is a new destination. The market is not yet open, but exporters hope that the papers will be signed in the coming months. Also, the country has a good connection with the Middle East and the Far East. Singapore and Dubai are reached with a daily flight. The traditional markets are Europe, Canada and the US.

Peru predicts strong growth

Last year, the country's blueberry exports were worth approximately \$ 250 million. Forecasts point to an export value of \$ 1 billion by 2021. The country exported more than 24,000 tonnes of blueberries, and this volume should rise to 120,000 tonnes by 2021. Agriculture is an important pillar of the economy. In regions with many crops, unemployment is zero.

In order to bring this huge volume onto the market, the sector needs some fine tuning. Research shows that the market can handle 10,000 tonnes per week. Ideally, 60 to 70% should be on the market between September and November. The rest will follow in the months afterwards. Although countries such as Uruguay, Argentina and Chile compete in terms of volume, the Peruvian sector is especially afraid of Mexico's quality berries. The country reached an agreement with neighbouring Chile for the export of blueberries.

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