



North American Highbush Blueberry Market Situation

Highbush blueberries are native to North America. Commercial production of these forest blueberries began in 1916 when the first commercial crop grown in the Pinelands of New Jersey went to market. Today, highbush blueberries are produced in 48 U.S. states, two Canadian provinces, Mexico and other southern and northern hemisphere countries, including Peru, Chile and Argentina.

Blueberry Industry Growth¹

Highbush blueberries comprise 92% of all blueberries grown in the United States and 80.4% of North American blueberry production, while lowbush blueberries comprise 8% of all blueberries grown in the U.S and 19.6% in North America.

The U.S., Canada and Mexico together produce



1,112.6 million lb. (504,666 mt.)
of blueberries annually.

Highbush blueberry production

630.1 million lb. (504,666 mt.) in the U.S.

895 million lb. (405,965 mt.) in North America

Lowbush (wild) blueberry production

55 million lb. (24,947 mt.) in the U.S.

217.5 million lb. (98,656 mt. mt.) in North America

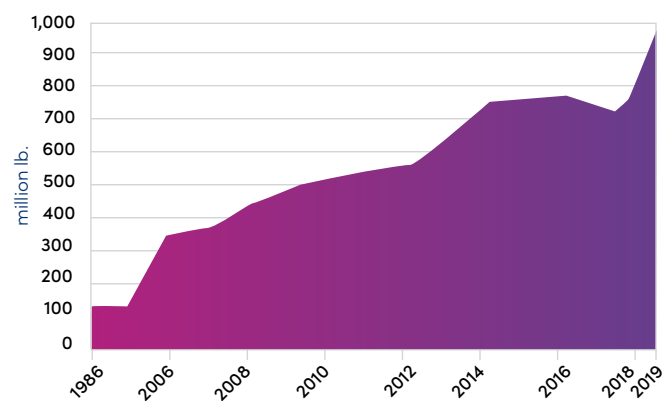
Market share for highbush and lowbush

508.8 million lb. (230,787 mt.) fresh

603.8 million lb. (273,879 mt) frozen

Fresh highbush blueberries make up 99.3% of all North American fresh blueberries, while lowbush make up 0.7%. Frozen highbush blueberries make up 64.6%, while lowbush make up 35.4% of all North American frozen blueberries.

North American Highbush Blueberry Production



Highbush Blueberries Span the U.S.¹

U.S. highbush blueberries continue to thrive with production acres, farming and processing efficiencies. Fresh blueberry production begins in February in Florida and California, and ends in late September and early October in the Northwest. The peak of North American frozen production is June through August.

Highbush blueberries are marketed as both fresh and frozen. Fresh blueberries are mainly harvested by hand. Blueberries for the frozen and ingredient market, known as processed blueberries, are available year-round. They are machine harvested and promptly frozen or processed to preserve their flavor, texture, shape and color.

2020 Preliminary

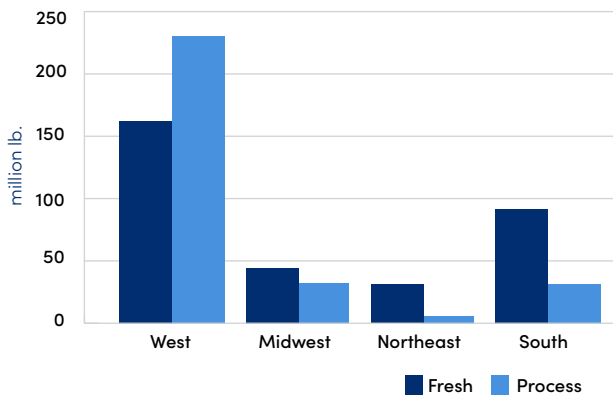
Major fresh producing U.S. states (million lb.)

Oregon	(72)	Texas	(4)
California	(55)	Illinois	(1)
Washington	(35)	Indiana	(0.8)
Michigan	(41.3)	New York	(0.4)
New Jersey	(30)	Mississippi	(1.5)
Georgia	(45)	Louisiana	(0.5)
North Carolina	(22)	Alabama	(0.1)
Florida	(17)	Arkansas	(0.1)

Major frozen processing U.S. States (million lb.)

Washington	(130)	North Carolina	(11)
Oregon	(88)	New Jersey	(6)
Michigan	(32)	Indiana	(0.2)
Georgia	(20)	Mississippi	(0.5)
California	(12)		

U.S. Highbush Blueberry Production by Region (By Million lb.)¹



Market Demand for Blueberries²

Blueberry ingredients appeal to food manufacturers and consumers alike. According to a 2019 survey conducted by Rose Research, manufacturers characterize blueberries as versatile and easy to work with, with strong consumer appeal.² Three-quarters of manufacturers surveyed reported using blueberries in their products – higher than any other berry. In fact, blueberries were singled out as the berry most used in manufactured goods by about a two-to-one margin versus strawberries and cranberries. And the majority of survey respondents agreed that products containing blueberries are highly sought after by consumers.

Blueberries' health halo is a key force driving demand: 81% of manufacturers agreed adding blueberries to their products provides consumers with perceived or additional health benefits. Blueberries' color and flavor add to their popularity, with a majority of manufacturers surveyed citing that blueberries provided added value to their customers.

The Advantages of Blueberry Ingredients²

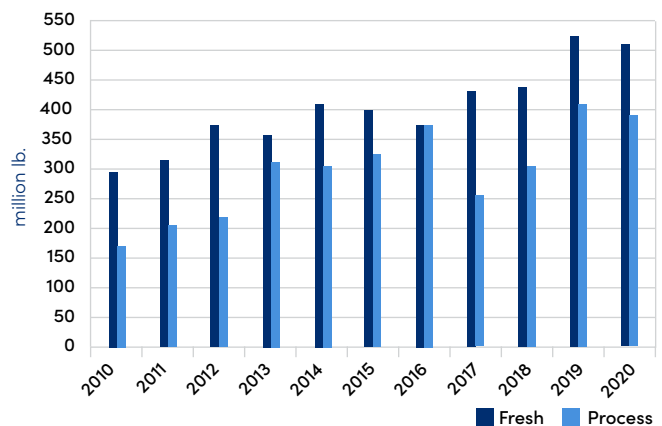
Advantages cited by food professional survey respondents are shown in the word cloud below.



Blueberry Consumption

U.S. blueberry consumption continues to increase. The USDA Economic Research Service (ERS) reported from 2000-02 to 2017-2019 that U.S. fresh blueberry consumption grew over 510%.⁴ In 2019, per capita use of fresh blueberries reached 2.33 pounds (1,056.87 g.) and frozen per capita consumption was 0.32 pounds (145.15 g.), totaling 2.65 pounds (1,202.02 g.).⁵

North American Highbush Blueberry Production Fresh and Process^{1,3}



Sources

¹NABC 2020 Preliminary Crop Estimate

²Blueberries in Food Manufacturing, August 2019 Report, Rose Research

³NABC. 2019 Preliminary Crop Report as of March 5, 2020.

⁴<https://www.ers.usda.gov/webdocs/outlooks/99458/fts-371.pdf?v=6552.3>

⁵Fruit Yearbook Supply and Utilization Tables 2020. Tables G-5, G-38

⁶Blueberry Customer Segmentation, April 2019 and Winter 2020, Topline U&A Study Wave 2, Jan./Feb. 2020

The U.S. Highbush Blueberry Council is an agriculture promotion group, representing blueberry growers and packers in North and South America who market their blueberries in the United States and overseas, and works to promote the growth and well-being of the entire blueberry industry. The blueberry industry is committed to providing blueberries that are grown, harvested, packed and shipped in clean, safe environments. Learn more at blueberrycouncil.org.