

# Entering the European market for blueberries

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Blueberries are a typical retail product that require scale and professional cultivation. As a supplier, it is important to operate in close coordination with producers and establish international partnerships to reach major retailers. Over the years it has become a difficult market to enter. Good quality blueberries can still be a very profitable crop, but it takes large investments in cultivation, varieties and packing to deal with the fierce competition from Peru, Spain and Morocco.

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## 1. What requirements and certifications must blueberries meet and have to be allowed on the European market?

Fresh blueberries must comply with the general requirements for fresh fruit and vegetables, which you can find on [the CBI market information platform](#). [My Trade Assistant](#) of Access2Markets provides an overview of export requirements for blueberries and other berries of the *Vaccinium* genus (product code 08104000).

### What are mandatory requirements?

There are specific marketing standards for different berries, but most importantly they must be clean for direct consumption and the quality must be well kept by a proper post-harvest process.

### Pesticide residues and contaminants

Pesticide residues are one of the crucial issues for fruit and vegetables suppliers. This is especially relevant for fresh blueberries, as they are directly consumed.

To avoid health and environmental risks, the European Union has set maximum residue levels (MRLs) for pesticides and other contaminants, such as heavy metals, in and on food products. Products exceeding the MRLs are withdrawn from the market.

Note that buyers in several EU Member States, such as Germany, the Netherlands and Austria, use even lower MRLs than those established by European legislation. The German retailer LIDL, for example, only allows 33% of the MRLs established by the law. [LIDL has a supermarket network across Europe](#) and this requirement normally applies regardless of the country in which the product will be sold.

#### Tips:

Check [the EU Pesticides database](#) to find all MRLs and those specific for blueberries. Search by product or pesticide to find the list of associated MRLs.

Use [integrated pest management](#) (IPM) in production to reduce the use of pesticides.

Read more about MRLs [on the website of the European Commission](#). Check with your buyers if they require spray registers or if they have additional requirements on MRLs and pesticide use.

Make sure that lead contamination in your blueberries remains below 0.10 mg/kg and cadmium below 0.030 mg/kg, according to the [maximum levels for certain contaminants in foodstuffs](#).

## Microbiological criteria

Food safety authorities can withdraw imported berries from the market or stop them from entering the European Union if salmonella, norovirus, E. coli or other bacteria are present ([Regulation No 2073/2005](#)).

The European Food Safety Authority (EFSA) has identified [potential factors that cause contamination of berries with Salmonella and norovirus](#). These include rainfall, the use of contaminated water for irrigation or for applying pesticides, and contaminated equipment. EFSA recommends good agricultural, hygiene and manufacturing practices to reduce contamination in berries.

#### Tips:

Make sure to use clean water and equipment in the cultivation and processing of blueberries. Use good hygiene practices when hand-picking your berries.

Use the [European Union guidance document](#) on addressing microbiological risks in fresh fruits and vegetables in primary production through good hygiene.

Review the [search results for blueberries in the EFSA website](#), to be aware of the additional potential risks identified by this authority.

## Phytosanitary regulations

Blueberries must go through plant health checks before entering or moving within the European Union.

European regulation requires plants and fruits of the *Vaccinium* genus originating in Canada, Mexico and the USA to be free from *Grapholita packardii* Zeller, also known as cherry fruit worm, which must be established in the country of origin by the national plant protection organisation. The plant health inspection must take place in the country of origin and the shipment must be accompanied by a phytosanitary certificate, guaranteeing that they are:

- properly inspected;
- free from quarantine pests, within the requirements for regulated non-quarantine pests and practically free from other pests;

- in line with the plant health requirements of the EU, laid down in [Regulation \(EU\) 2019/2072](#).

**Tip:**

Check which (other) fruit and vegetables require a phytosanitary certificate in the lists of Annex XI and Annex XII of [Regulation \(EU\) 2019/2072](#).

## Quality standard

For more information on quality, size, packaging and labelling requirements for berries, including blueberries, see the [UNECE standards for berry fruits](#) (2023 edition).

Blueberries must at least comply with the general quality requirements (see Table 1). Bilberries and blueberries must be practically free of agglomerated berries. Blueberries must be practically covered with bloom, according to the varietal characteristics.

Table 1: Quality requirements and permissible tolerances for fresh berries, including blueberries

General quality requirements (all classes)
1. Intact;
2. sound – produce affected due to rotting or deterioration, making it unfit for consumption, is excluded;
3. clean, practically free of any visible foreign matter;
4. practically free from pests;
5. practically free from damage caused by pests;
6. fresh in appearance;
7. free of abnormal external moisture;
8. free of any foreign smell and taste, including bitter taste in case of bilberries;
9. the development and condition of the berry fruits must be such as to enable them: <ul style="list-style-type: none"> <li>• to withstand transportation and handling.</li> <li>• to arrive in satisfactory condition at the place of destination.</li> </ul>

Europe almost exclusively requires Class I blueberries as a minimum. Blueberries in this class must be of good quality and within the following permissible tolerances:

- very slight leakage of juice;
- very slight bruising;
- a tolerance of 10% is allowed for fruit that meets Class II standards.

In no case may the defects affect the fruit flesh, the general appearance of the produce, the quality, the keeping quality and the presentation in the package.

**Tips:**

Maintain strict compliance with quality, delivering it as agreed with your buyer. Being careless with your standards will lead buyers to raise issues with quality.

Check these articles by Wageningen University which highlight the [different characteristics that determine the quality of blueberries](#) and [harvest practices](#) for the delivery of a high-quality product.

## Post-harvest

Berries must be cooled directly after harvest, which lowers the field heat from the berry and extends shelf life. A perfect [cold chain](#) is a must to maintain fruit quality and successfully export your blueberries to Europe.

**Tip:**

Consider [using](#) a controlled atmosphere for temporary storage in addition to your cold rooms, so as to further improve the quality and shelf life of your product.

## Size and packaging

There is no specific standard for blueberry sizes in Europe. Buyers may have specific requirements for fruit grading, so it is best to discuss it beforehand.

The type of packaging also depends on your buyer. The contents of each package must be uniform and contain only berry fruits of the same origin, variety and quality.

Common packaging includes:

- Bag-in-box for bulk packaging (3–4 kg);
- Clamshells or punnets of various sizes, such as 12x125 g, for direct marketing. Larger packaging than the usual 125 g is growing more popular, subject to supply levels;
- Shakers or buckets often in 250 g or 500 g sizes done by packing companies in destination countries.

European retailers increasingly push for more sustainable packaging. As a supplier, you are expected to use recyclable or biodegradable packaging. The organic importer Eosta, for example, [offers plastic-free packaging alternatives for blueberries](#). Also, back in 2021, the [Italian brand Sant'Orsola](#) introduced zero-waste and zero-

residue blueberries in plastic-free packaging. Looking ahead, the EU-funded project FRIETS has developed [edible seaweed-based coatings to preserve berries and avoid plastic packaging](#).

#### Tips:

Always discuss specific packaging requirements and preferences with your customers. Make sure you can offer different types of wholesale and retail packaging.

See the [buyer requirements for fresh fruit and vegetables](#) on the CBI market information platform for the legal labelling requirements.

Check the additional requirements if your product is pre-packed for retail in the [Codex General Standard for the Labelling of Pre-packaged Foods](#) or [Regulation \(EU\) No. 1169/2011](#) on the provision of food information to consumers in Europe.

## What additional requirements do buyers often have?

Good agricultural practices, certifications and sustainability are most important, but future requirements may also become more specific in relation to varieties and taste.

### Variety

Although varieties are often indicated in the packaging, consumers in the end market often do not have preferences for specific blueberry varieties. The main reason to choose the right variety is to optimise productivity, quality and extend supply seasons. Choosing the right variety is important to obtain the best product for your client in terms of flavour, firmness, colour and shelf life. Large blueberries with a high brix value (sweet taste) are most likely to fetch higher prices.

In the future, as the market for blueberries further matures and end-clients become more knowledgeable, specific variety preferences may also develop. Keep in mind that not all varieties work well in all growing areas. Breeders usually perform an evaluation of the climatic conditions and characteristics of your growing area to recommend the right variety for you.

#### Tips:

Learn more about different blueberries by looking at the available varieties of large nurseries, such as [Fall Creek Nursery](#). Try not to become completely dependent on a single variety, but experiment with different ones.

Choose the right blueberry varieties by learning from other companies. Close cooperation with market players in Europe is essential.

## Certification

Common certifications for blueberries include [GLOBALG.A.P.](#) for good agricultural practices, and [GLOBALG.A.P. Chain of Custody \(CoC\)](#). Additionally, [BRCGS](#), [IFS](#) or similar HACCP-based food safety management systems recognised by the [Global Food Safety Initiative \(GFSI\)](#) are required for packaging and processing facilities.

## Sustainability and social responsibility

Besides GLOBALG.A.P., water management has become a crucial issue for blueberry cultivation. This means that many importers require [SPRING](#) for berries and the GLOBALG.A.P add-on for sustainable irrigation and groundwater use. Additionally, a social certificate such as [GRASP](#) or Sedex Members Ethical Trade Audit ([SMETA](#)) is highly recommended to get your product up to retail standards.

Retailers can also impose their individual standards, such as [Tesco Nurture](#) or [M&S Field to Fork](#). Especially larger retail chains in northern Europe are more prepared to buy your product if you comply with social and sustainability standards.

In the near future you can expect new standards and buyer requirements to be introduced. For example, the [Sustainable Trade Initiative for Fruit and Vegetables \(SIFAV\)](#), a private covenant between European importers and retailers, has formulated new goals towards 2025 that include reducing the carbon footprint and sustainable water use.

### Tip:

See the SIFAV [basket of water standards](#) and the [basket of social standards](#). Implement at least one social and one environmental standard, after researching the market and assessing your buyer's needs.

## European Green Deal

In the coming years the [European Green Deal](#) will influence how resources are used and greenhouse gas emissions are reduced. The new EU policies on sustainability will prepare Europe for becoming the first climate-neutral continent by 2050.

The [Farm to Fork Strategy](#) is at the heart of the European Green Deal aiming to make food systems fair, healthy and environmentally-friendly. It will ensure sustainable food production and address things like packaging and food waste. For suppliers of fresh fruit and vegetables, it is important to look beyond more and higher standards and to try to be ahead of the developments.

### Tip:

For other additional requirements, such as payment and delivery terms, see the CBI's reports on [buyer requirements for fresh fruit and vegetables](#) and [tips for doing business with European buyers](#).

## What are the requirements for niche markets?

### Organic matches the healthy profile of blueberries

Organic certification can be an interesting way of setting your blueberries apart and marketing them at higher prices. Blueberries are very popular because of their health benefits and are directly consumed, which leads to

increased consumer interest in clean and certified organic blueberries.

Specialised buyers such as [SpecialFruit](#) (Belgium), [Lehmann Natur](#) (Germany) and [Eosta](#) (Netherlands) work with organic blueberries. For a large part, organic blueberries are sourced locally and are sometimes from the bilberry or wild blueberry varieties. In France, retailer Carrefour sells [zero-residue blueberries](#), blueberries without detectable pesticide residues, as an alternative to organic. In Germany, low or zero residue is already a standard and organic is one step up from it.

To market organic products in Europe, you must use organic production methods according to [European legislation](#) and apply for an organic certificate with an accredited certifier. In January 2022 the new [Regulation \(EU\) 2018/848](#) came into force. This legislation includes new rules for group certifications, new approaches for dealing with suspected non-compliance and residues, and new rules at the EU borders for imported products. Inspection of organic products has become stricter to prevent fraud, and producers in third countries have to comply with the same set of rules as those producing in the European Union.

**Tip:**

Strive for residue-free blueberries and certify your production as organic, if possible, to broaden your market opportunities. But remember that implementing organic production and becoming certified can be expensive; you must be prepared to comply with the entire organic certification process.

## 2. Through which channels can you get blueberries on the European market?

Blueberries are a premium fruit, which you can market through specialised soft fruit importers to supermarkets. Offering different packaging options can increase your market chances.

### How is the end-market segmented?

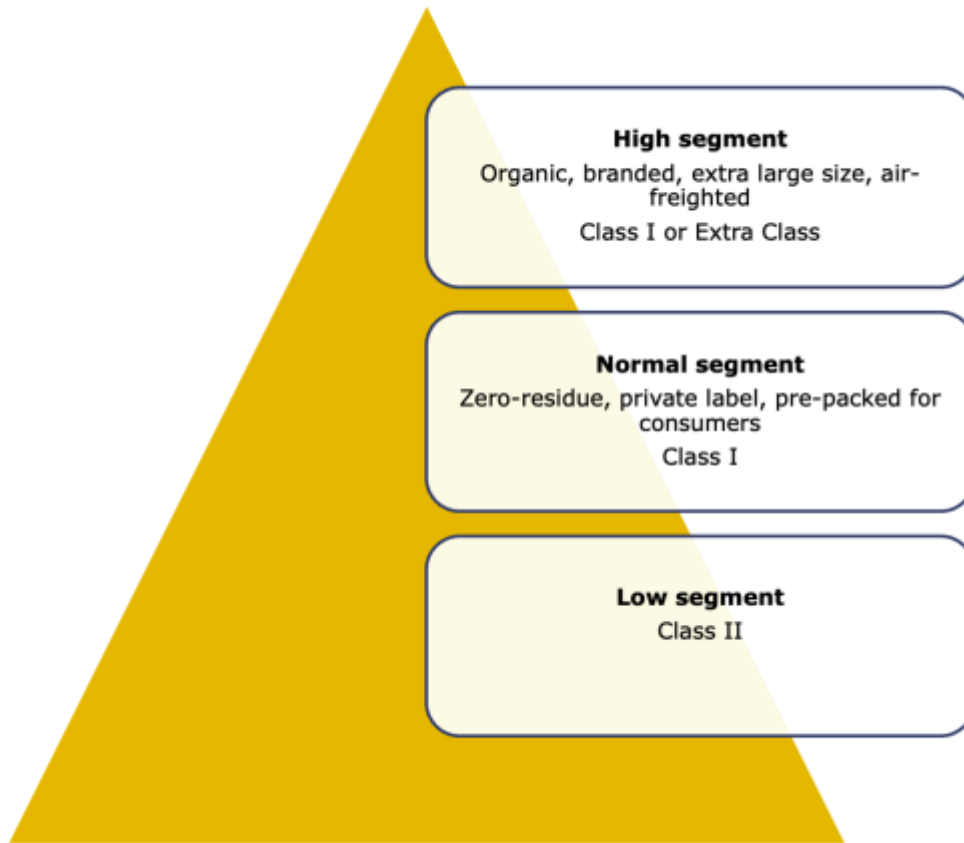
The market segmentation for blueberries is straightforward. Certified organic blueberries and those branded as premium fetch the highest prices. Several supermarkets in large consuming countries have premium brands, such as [Waitrose's DUCHY blueberries](#) (premium organic blueberries), [Family Tree Farms Jumbo Ultra-Premium Blueberries](#) or [Driscoll's 'Sweetest Batch' premium blueberries](#).

The most common segment is Class I blueberries, which are geared to average consumers. Retailers offer these blueberries in different sized consumer packages and often private label. They can be sourced from any origin. When market demand is very high or supply is short, occasional airfreight may raise blueberry prices.

Class II blueberries are not common, but can be marketed for fresh processing or by individual shops and street markets for quick sales. Blueberries that fail to meet the normal specifications are thrown away or, if possible, sold for any acceptable price.

The segmentation for blueberries is likely to diversify with more varieties, flavours, qualities and brands. The United Kingdom is farther ahead on these developments in Europe. Over the next few years, you will see a growing demand for premium blueberries, but also much more price competition from the medium segment.

Figure 1: Market segments for blueberries in Europe



Source: [ICI Business](#)

#### Tips:

Be honest about quality and back up your product. Document your cold chain and product appearance with photos before shipping to help you in case the buyer rejects the quality and wants to renegotiate value and price.

Try to come up with a unique selling point for your product, such as organic certified blueberries or a superior variety. This could help you differentiate from other suppliers and reach a higher segment. Check this example of Ilaru from Ecuador, with their [“Highland Blueberries” value proposition headline](#), that promises a premium-quality blueberry.

Branding your own blueberries can be an option if you are able to differentiate and invest in marketing. The best way to do this is with a partner in Europe.

### 3. Through which channels does a product end up on the end market?

#### Importers and service providers

Importers and traders play a central role in the distribution of blueberries. They are familiar with all the different requirements of end clients and are able to distribute to different markets. By sourcing blueberries from different regions, traders can assure their clients with year-round supply.



Blueberry and soft fruit specialists supply most of the market, forming a link between growers and retailers. Specialists such as [Yex](#) (formally known as Fruit World) and [Growers Packers](#) in the Netherlands, and [Chambers](#) and [S&A Group](#) in the United Kingdom, are closely involved in or integrated with primary production to offer a wide range of packing and mixing solutions. Packing is an important activity in the blueberry supply chain and consumer packing is a must for supermarkets.

Working closely with a company specialised in soft fruit is important to get your product to large retail chains. Specialists with global import activities are also very useful to indirectly reach wholesale, foodservice and processing channels. To reach industrial processors, it is a good idea to add frozen or preserved blueberries to your offer. However, the latter is a different market that you can further investigate in the CBI study on [exporting frozen berries to Europe](#).

## Supermarket supply programmes

Blueberries are a typical retail product. Large retail organisations want to source blueberries close to production, so they have more control and transparency in their supply chain. The demand for more transparency has led fresh fruit traders to get more involved in production. Several of these companies have merged their businesses with farmers and nurseries. For example, [Berryworld](#) is a highly specialised company that has managed to organise a group of international growers to supply to supermarkets, such as [ICA](#) (Sweden), [Coop Denmark](#) and [Albert Heijn](#) in the Netherlands.

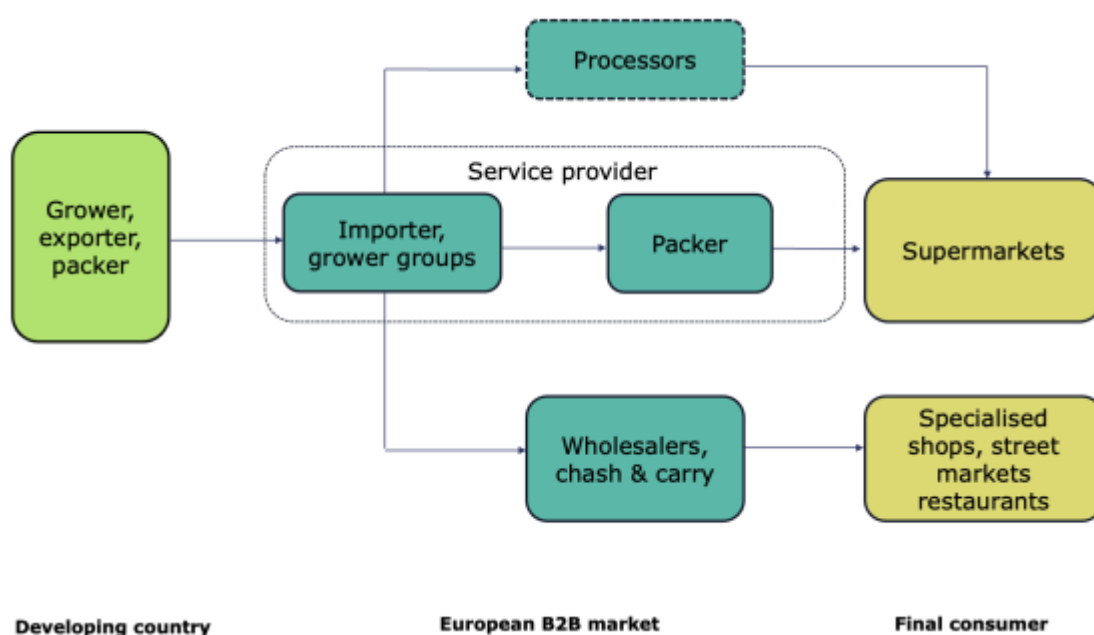
## Wholesalers (spot market)

Wholesalers often supply smaller quantities of blueberries to secondary channels such as specialised fruit retailers and food services.

Smaller, traditional wholesalers reach fruit shops, street merchants, restaurants and hotel chains. They may also do importing, but they are not equipped to organise a global network of blueberry growers. Instead, they prefer to buy from local growers and international blueberry specialists. Without a retail programme, they only cover the spot market and are most subject to market fluctuations.

Global growing and sourcing companies have covered the large wholesale business and supply major food service chains or non-specialised (cash & carry) wholesalers, such as [Metro](#).

Figure 2: Market channels for blueberries



**Tips:**

Combine fresh exports with processed blueberries, for example, frozen, dried, syrups, purees and juices. Few buyers may have demand for both, but more importantly, processed blueberries provide you with a secondary channel for fruit that is not fit for fresh export.

Make sure you have access to a reliable and certified packing station when dealing with large retailers. You have the option of packing your blueberries directly in consumer packaging after harvest or outsource repacking in the destination country. This will also depend on your customer's preference.

## **What is the most interesting channel for you?**

Taking part in retail supply programmes can provide the security of stable demand and average margins, which are often most profitable in the end. However, the requirements are high and the room for negotiation is minimal.

Supplying supermarkets directly is challenging for non-European suppliers. Their demand is programmed and the local seasonal production weighs heavily in retailers' preferences. As a foreign supplier, you must be prepared to integrate your business with European berry growers or service providers, offering full service and reliable volumes.

The most likely route to become part of a retail programme is to cooperate with a service provider that has a local infrastructure and already established supply contracts with retailers. [dps Ltd](#) (United Kingdom) is an example of a dedicated supplier for Marks & Spencer and Tesco, among other retailers. Their standards and the preparation time to become a supplier can be extensive, but in return they do strive for long-term partnerships.

If you cannot comply with the high service level or guaranteed supply contracts that are required by large retailers, it is best to work with an importer that has a diverse network of clients. An example of a key player is [Widmann](#) from Germany, the largest blueberry importer in the country. They have supermarket programmes, but also serve wholesale clients. With its own production in different countries and partnerships all over the world, Widmann is an example of a grower that has become a vertically-integrated company with worldwide operations.

**Tip:**

Go to trade fairs to find buyers. The main trade fairs for fresh fruit are [Fruit Logistica](#) in Berlin and [Fruit Attraction](#) in Madrid. To choose the best one to attend, review the latest visitors numbers and exhibitor lists. Check if your potential clients will be there.

## **4. What competition do you face on the European blueberry**

## market?

The scale of your operation and your professional performance determine your competitive advantage in the blueberry market. Over the years the offer has diversified with new players, improved varieties and cultivation technologies. The entry costs to start your own production are high. Seasonality is the other main factor that defines your competition. It is important to monitor the increasing competition and the fast-planting rates worldwide in relation to demand.

## Which countries are you competing with?

In the southern hemisphere, Peru, Chile and South Africa are strong suppliers (Table 2). In the north, your principal competitors are European producers, such as those in Spain and Poland. Morocco is the strongest non-European competitor that competes within the European season. These supply seasons change quickly (see supply calendar in Figure 4). There is a search for new blueberry-producing countries to reduce dependence on Peru. This is why countries such as [Zimbabwe](#), [Ukraine](#), and [Georgia](#) are increasingly resonating with buyers.

When local production is abundantly available, it is difficult for long-distance suppliers to sell to the European market. Recent logistical challenges and increasing attention to carbon footprints have further tipped the scales in favour of local blueberries. In fact, as pointed out in the market potential section of this study, blueberry production is on the rise in most European countries.

Table 2: Main 10 exporters of blueberries to Europe, in 1,000 tonnes, 2019-2023

Exporters to Europe	2019	2020	2021	2022	2023	Share in 2023
Netherlands	53	66	71	85	75	20%
Spain	67	65	89	86	70	19%
Peru	38	56	62	85	61	16%
Morocco	25	32	40	51	48	13%
Chile	33	35	40	37	30	8%
Poland	18	19	23	24	24	6%
South Africa	12	16	19	23	21	6%
Portugal	4	5	6	7	7	2%
Germany	6	6	6	9	7	2%
Serbia	1	2	4	3	5	1%
Total imported volumes by Europe	290	337	368	434	369	

Source: ITC Trade Map, 2024

Note: European suppliers are marked in italics

Source: ITC Trade Map, 2024

Figure 4: Indicative blueberry supply calendar to Europe

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Mexico (Jalisco, Baja California)												
Morocco												
Spain, USA (South)												
France												
Portugal												
Serbia												
Netherlands												
Ukraine												
Zimbabwe												
Germany, Poland												
Canada, USA (north)												
Zambia, Namibia, northern South Africa												
Peru												
Argentina/Uruguay												
South Africa (western cape)												
Chile												

Source: [ICI Business](#) and [Dana Chahin](#)

## Peru: booming in blueberries

In less than a decade, Peruvian producers have built up a new blueberry sector, becoming the world's top exporters. Peru has had exponential growth in blueberry cultivation in the last five years, most of which was exported. In 2023, Peru exported a total volume of 206,584 tonnes, representing a 25% decline from 2022 due to rough weather conditions caused by [the El Niño phenomenon](#). Despite weather challenges, [Peru expanded its cultivation areas in 2023](#) and the predictions for future production levels remain positive.

Although most Peruvian blueberries are shipped to the United States, Peru has become the largest non-European supplier to Europe. Europe imported a value of €504 million in 2023 (see figure 3). Keep in mind that Peru and Chile have an overlapping harvest season at the end of the year, with volumes and competition increasing as a result.

Peruvian growers mostly rely on the Ventura and Biloxi cultivars, but new genetics and more blueberry varieties are being introduced. There are now [up to 62 blueberry varieties under development or in the patent application stage](#) and experts have projected that [120,000 tonnes of the more than 300,000 tonnes that Peru could export in 2025, will be of new varieties](#). In terms of organic, Peru [exported 30,634 tons of organic blueberries in 2023](#), which represented a 13% decline compared to 2022. However, Peru is still the main supplier worldwide.

In Peru, [30% of blueberry production comes from small producers](#). Cultivation areas vary between 5 and 50 hectares, in contrast to larger companies' areas with more than 1,000 hectares. The large presence of small producers is both a strength and a weakness for Peru. The scattered production over different areas gives producers the advantage of prolonging their harvest season. On the other hand, consistency in quality and agricultural practices may vary among small growers.

#### Tips:

Consider diversifying your production sources, for example, by teaming up with growers from different regions.

See who are the leading suppliers and competitors in Peru on [Agrodata.peru.com](https://agrodata.peru.com).

## Morocco: the advantage of proximity

Morocco is an up-and-coming producer of blueberries. Plantations came into use in 2005. In the last 15 years, [the area under blueberry cultivation has increased more than 15-fold](#). Most of the Moroccan production goes to the European market. European import levels reached a value of nearly €360 million in 2023, almost double the value recorded just five years earlier.

Morocco offers a good climate for blueberries and the harvest starts before Spain's. With relatively low labour costs and close proximity to the European market, Moroccan producers can compete well with producers in Southern Europe.

The Moroccan government has made agricultural development a priority, encouraging private investment and exports. Several companies have invested in Moroccan blueberries: Australia's [Costa Group became a majority stakeholder in African Blue in 2017](#). Several Spanish companies have invested in cultivation in Morocco, such as the [Spanish company Fresh Royal with its own blueberry plantations](#). To a certain extent, Morocco's production relies on foreign investment, but it has a strong advantage in the early season and direct connection with the European and Spanish market.

#### Tip:

Read more about Morocco's strategic advantages and challenges in this [article published in Freshplaza](#).

## Chile: leading in experience

Chilean companies are highly experienced in breeding and cultivating some of the best blueberries in the world. Today, they are exploring production growth in other countries such as Peru and Mexico. For a long time, Chile was the leader in blueberry export in the southern hemisphere, but in 2019 they were overtaken by Peru's booming export. With a large north to south stretch, these two countries together are able to fulfil the whole off-season blueberry period in Europe.

European imports of Chilean blueberries were valued at €169 million in 2023, showing a 2.7% decline over the past five years. Most blueberries exported to Europe are shipped to the Netherlands and the United Kingdom, but Germany and Spain have also maintained constant but lower import volumes from Chile.

Due to increasing competition from Peru and Morocco, the Chilean blueberry sector has seen the need to keep improving quality to maintain its leading role. You can expect growers in Chile to be innovative in production. They have increased organic production, for example. According to the [International Blueberry Organisation](#)

(IBO), 25% of blueberry area under cultivation in Chile is organic. In 2023, Chile saw a [slight increase in its total organic blueberry exports compared to 2022, reaching 14,752 tonnes](#).

[Varieties renewal is also part of the country's ongoing efforts](#) to maintain its position in the world, as Chile currently exports mainly traditional varieties such as Biloxi, Legacy and Duke. For the 2024/2025 season, the Chilean Blueberry Committee [expects new varieties shipments to increase by 26%](#), reaching more than 16,000 tonnes.

The experience and the advanced production knowledge in Chile raise the bar for new exporters. To compete with Chilean blueberry companies, you must be able to provide an equal quality level or distinguish yourself in another way, such as being closer to the European market.

Tip:

Look at developments in countries with similar climates and try to understand the growers' choices of blueberry varieties. Ask for advice from breeding companies about the benefits of specific varieties.

## South Africa: putting itself on the blueberry map

Unlike South American suppliers, South Africa mainly directs its blueberry export to Europe. The Netherlands and the United Kingdom are the main importing markets. The European import of South African blueberries passed the value of €100 million for the first time in 2021 and since then has grown to reach €157 million in 2023.

Thanks to a rising production, South Africa has become one of the main suppliers to Europe and its blueberry industry is the fastest-growing horticultural industry in South Africa. The next IBO summit will be held in South Africa in 2025, highlighting the [increasing role of Southern Africa in the worldwide blueberry sector](#).

South Africa has faced challenges such as [port delays and power outages](#) that affect the cold storage of the blueberries. Although the country has also faced production shortages, [South Africa's production in 2023 was not as limited as in other producing countries](#). General export volumes declined only by 2%, and exports to Europe declined by 8%. Additionally, the general price upsurges even benefited growers and exporters.

The blueberry sector is dominated by a few large companies. Deep integration of South African businesses with British companies secures a market in Europe for South African blueberries. This is the case for Driscoll's partnership with [Haygrove's](#) blueberry production in South Africa and [BerryWorld's joint venture](#) with South African grower Trevor McKenzie. The latest [opening of a large Fall Creek nursery](#) and the [partnership between blueberry breeder Planasa and TopFruit South Africa](#), have contributed to diversity and new genetics for growers.

Tips:

Use digital technology to stay ahead of the competition. Technology can help increase your yield and product quality to position yourself against competitors. Read our [tips on going digital](#) on the CBI market information platform and stay ahead of developments such as this [Chilean harvesting tool](#).

Find horticultural experts to get advice on the best production techniques for your region. These may include anything from new fertilisation practices or netting to protect the crop up to high-tech greenhouse technology.

## Which companies are you competing with?

There are several successful blueberry suppliers in various parts of the world and what they all have in common is a direct link with cultivation, often of different varieties. They have the ability and financial means to scale up and find strategic alliances. Successful companies can reinvest their profits in new genetics and foreign acquisitions, a necessity to remain competitive.

### Camposol: leading in volume and marketing

[Camposol](#) is the leading Peruvian exporter of blueberries. Their huge volumes and strong marketing allow them to trade with many large supermarket chains worldwide. Camposol has more than 3,000 hectares and expects to increase its blueberry output to 100,000 tonnes in next years through varietal replacement and the addition of new land. Their latest innovation is their new [in-house developed variety La Chola](#), characterised by its high yield, firmness, large berry size and high brix.

### Hortifrut: integrated from breeding to trade

[Hortifrut](#) is a global player in the blueberry sector headquartered in Chile. It is a highly integrated company, both vertically and in production. The company has genetic breeding and cultivation alliances throughout the world. Hortifrut recently launched a [virtual reality tool for consumers and trade professionals](#). The tool – Berry reality – allows users to take a virtual tour of their farms in Peru, Morocco, Spain and Portugal.

In Europe, Hortifrut and the Spanish company Atlantic Blue founded [Euroberry Marketing](#) to commercialise blueberries throughout Europe. Hortifrut's combination of breeding technology with year-round production offers them a strong competitive advantage. Having easy access to different varieties of blueberries and an integrated supply chain make it easier to negotiate bigger contracts with large buyers.

### United Exports: using different origins

The international cultivation and breeding company [United Exports](#) is one of the largest producers in South Africa and has cultivation in key origins such as the United States, Peru, Chile, Australia, Mexico, Spain and Zambia. They prove the importance of combining different growing seasons. They have developed their own unique breeding programme with [OZblu blueberries](#). Europe is one of their main targets, servicing supermarkets such as Marks & Spencer, Waitrose, Lidl and Albert Heijn.

#### Tips:

Try to find funding to upgrade your company or establish strategic alliances. Size and integration matter in the blueberry sector. If you lack financial resources, you can explore credit options with development banks and investment organisations, such as [FMO](#) and [Oiko Credit](#).

Focus on varieties and increase your knowledge of blueberry production. Knowledge will help you cultivate and export the best quality berry. Start with webinars and [studies on the Blueberry consulting website](#).

## Which products are you competing with?

The biggest advantage of blueberries over other berries and soft fruit, is that they have a longer shelf life, a good quality throughout the year and are relatively easier to transport. Because it is a less traditional fruit,

consumers have become used to the year-round availability of blueberries. This means the supply period is much longer and stable than traditionally consumed soft fruit, such as strawberries, or stone fruit. This also explains why blueberries are the most frequently-imported berry by Europe from developing countries (Figure 5).

Source: ITC Trade Map, 2024

Because it is strongly promoted as a healthy product, blueberries have gained popularity over other soft fruit. However, when prices for blueberries go up too much, it can be a reason for consumers to switch to other fruit or choose frozen blueberries. Frozen and processed blueberries are generally cheaper and just as easy to use. Yet, fresh fruit is still the main product form of global blueberry production: according to the [2024 IBO report](#), 70% of the total output in 2023 was fresh instead of processed.

Tip:

Try to be competitive in price and quality in relation to other soft fruit on the market, although it is not something you can always control.

## 5. What are the prices of blueberries on the European market?

Until 2016, the demand was large enough for prices to rise, but after 2017 production volumes pushed prices back to the level of 2014. Prices in 2023 increased due to production shortages everywhere, but mainly in Peru, where the shortage was caused by the [El Niño phenomenon](#). Price levels in the future will depend on developing production worldwide.

In 2024, exporter prices for normal-to-high segmented blueberries have fluctuated between €6 and €8 per kilo (FOB). The actual prices will depend on the supply levels in the market, but also on the quality of your product. Prices can also vary depending on the destination market. The most accurate way to be informed about prices is to talk to your clients. If you work with an importing company or trader, expect to pay them around 8% commission on their sales prices, plus handling costs.

Retail prices range between €12 and €32 per kilo, depending on the country and the origin. Small packages with premium blueberries are the most expensive. Organic blueberries are sometimes sold for more than €30/kg. You can monitor retail prices by visiting the websites of leading European supermarkets, such as [Mercadona](#) (Spain), [Rewe](#) (Germany) or [Sainsbury's](#) (United Kingdom). [Italian Berry](#) publishes retail prices on the Italian market.

Be aware that retail prices have no relation to trade prices. When availability is very high, supermarkets tend to have additional promotions to help sell the extra volumes. Supermarket margins and costs are the highest in the supply chain (see Figure 6).

Source: [ICI Business](#)

Tips:

Look at indicative wholesale prices on [Freshplaza](#) and [France Agrimer](#) (search for 'myrtille' in French),



which will provide a rough indication of the market value of blueberries.

Read market updates in [Agronometrics](#) and subscribe to experts' newsletters such as [DC's B-Side](#). These provide updated market information.

[ICI Business](#) carried out this study in partnership with [Dana Chahin](#) on behalf of CBI.

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