

Entering the European market for blueberries

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. Good quality blueberries are a very profitable crop, but it takes large investments in cultivation, varieties and packing to deal with the fierce competition from Chile, Peru, Spain and Morocco.

Contents of this page

1. [What requirements must blueberries comply with to be allowed on the European market?](#)
2. [Through what channels can you get blueberries on the European market?](#)
3. [What competition do you face on the European blueberry market?](#)
4. [What are the prices for blueberries?](#)

1. What requirements must blueberries comply with 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](#). The [Trade Helpdesk](#) provides an overview of export requirements for blueberries (code 08104000).

What are the 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 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 Products exceeding the MRLs are withdrawn from the market.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 the United Kingdom, Germany, the Netherlands and Austria, use even lower maximum residue levels than those established by European legislation.

Tips:

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

Use [integrated pest management](#) (IPM) in production to reduce the use of pesticides. IPM is an agricultural pest-control strategy that includes growing practices and chemical management.

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

Make sure that lead contamination in your blueberries remains below 0.20 mg/kg and cadmium below 0,050 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, E. coli or other bacteria are present ([Regulation No 2073/2005](#)).

The European Food Safety Authority [recommends good agricultural, hygiene and manufacturing practices](#) to reduce contamination in berries.

Tip:

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

Phytosanitary regulations

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

As of September 2019, a [new European Directive](#) 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.

Tip:

Learn more about the European phytosanitary rules in [Council Directive 2000/29/EC](#) and the new [Implementing Directive 2019/523](#) on the protective measures against the introduction of harmful organisms in the European Union.

Quality standard

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

Blueberries must at least be:

- intact;
- sound – produce must be from rotting or deterioration likely to make it unfit for consumption;
- clean, practically free of any visible foreign matter;
- practically free from pests;
- practically free from damage caused by pests;
- fresh in appearance;
- free of abnormal external moisture;
- free of any foreign smell and taste, including bitter taste in case of bilberries;
- able to withstand transport and handling.

Bilberries and blueberries must be practically free of agglomerated berries. Blueberries must be practically covered with bloom, according to the varietal characteristics.

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.

Tip:

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.

Post-harvest

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

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, however, buyers may have specific requirements for fruit grading, so it is best to discuss it beforehand.

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 kg–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;
- Shakers or buckets often in 250 g or 500 g sizes done by packing companies in destination countries.

Tips:

Always discuss specific packaging requirements and preferences with your customers.

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 Prepackaged 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

Buyers in the end market often do not have preferences for specific blueberry varieties. The main reason for it is to optimise productivity and extend supply seasons. However, 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 sweet taste are most likely to fetch higher prices currently. In the future, as the market for blueberries further matures and end clients become more knowledgeable, specific variety preferences may also develop.

Tips:

Learn more about different blueberries by looking at the available varieties of large nurseries, such as [Fall Creek Nursery](#).

Choose the right blueberry varieties by learning from other companies, such as the [Peruvian suppliers in the United Kingdom](#).

Certification

Common certifications for blueberries include [GlobalG.A.P.](#) for good agricultural practices and [BRCGS](#), [IFS](#) or similar HACCP-based food safety management systems for packing and processing facilities. Management systems recognised by the [Global Food Safety Initiative \(GFSI\)](#) are most recommended.

Sustainability and social responsibility

Complying with sustainable and social standards has become common for all fresh fruit and vegetables. Besides GlobalG.A.P. to ensure good agricultural practices, a social certificate such as 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](#). Especially larger retail chains in northern Europe are more prepared to buy your product if you comply with social and sustainability standards.

Tips:

Implement at least one environmental and one social standard. See the [Basket of Standards](#) of the Sustainability Initiative of Fruit and Vegetables (SIFAV).

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 certified organic blueberries.

Specialised buyers such as [SpecialFruit](#) (Belgium) and [Eosta](#) (Netherlands) often work with organic blueberries. For a large part, organic blueberries are sourced locally and sometimes from the bilberry or wild blueberry varieties. In France, retailer Carrefour sells [zero residue blueberries](#) 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 have to use organic production methods according to the [European legislation](#) and apply for an organic certificate from an accredited certifier.

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.

Through what 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?

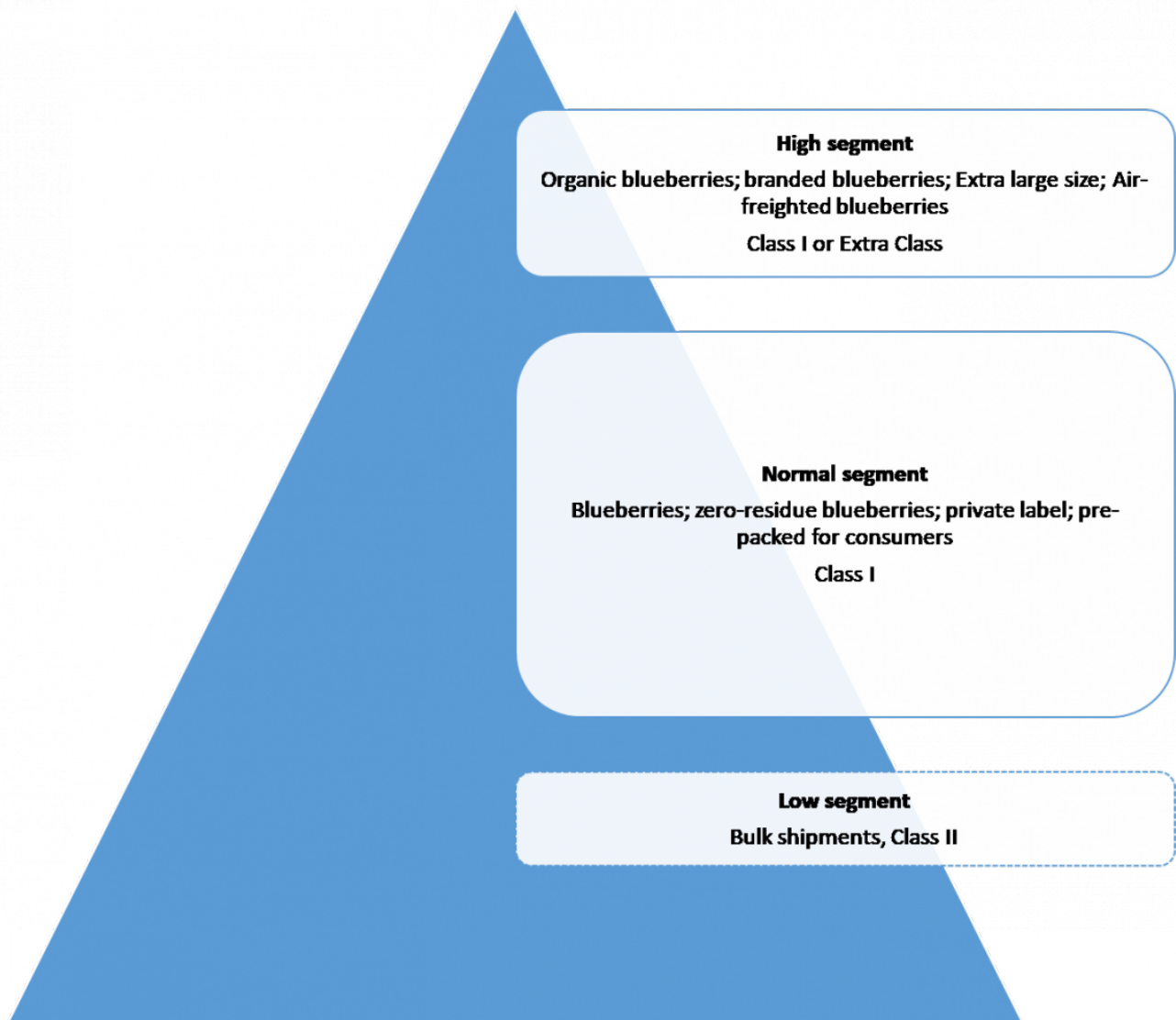
The market segmentation for blueberries is straightforward. Certified organic blueberries and those branded as premium fetch the highest prices. Several supermarkets in large consuming countries have premium brands, such as [Rewe's Feine Welt premium blueberries](#) (extra-large, hand-picked blueberries of the Rocio or Corona varieties) and [Waitrose's DUCHY blueberries](#) (organic blueberries).

The most common segment is Class I blueberries, which are geared to average consumers. Retailers offer these blueberries in different sizes of consumer packages and often private label. They can be sourced from any origin. When market demand is very high, 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.

Figure 1: Market segments for blueberries in Europe



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 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.

2. Through what channels can you get blueberries on the European 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 [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. However, for industrial processing frozen or preserved blueberries are almost exclusively used.

Tips:

Combine fresh exports with processed blueberries, for example, frozen, dried, syrups, purees and juices. Some 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.

Read our study about [exporting processed fruit to Europe](#) such as [frozen berries](#) on the CBI market information platform.

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 packages after harvest or outsource repacking in the destination country.

Supermarket supply programmes

Blueberries are a typical retail product. Large retail organisations want to source blueberries from sources located as close as possible, 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, so they are starting to participate in farming companies.

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.

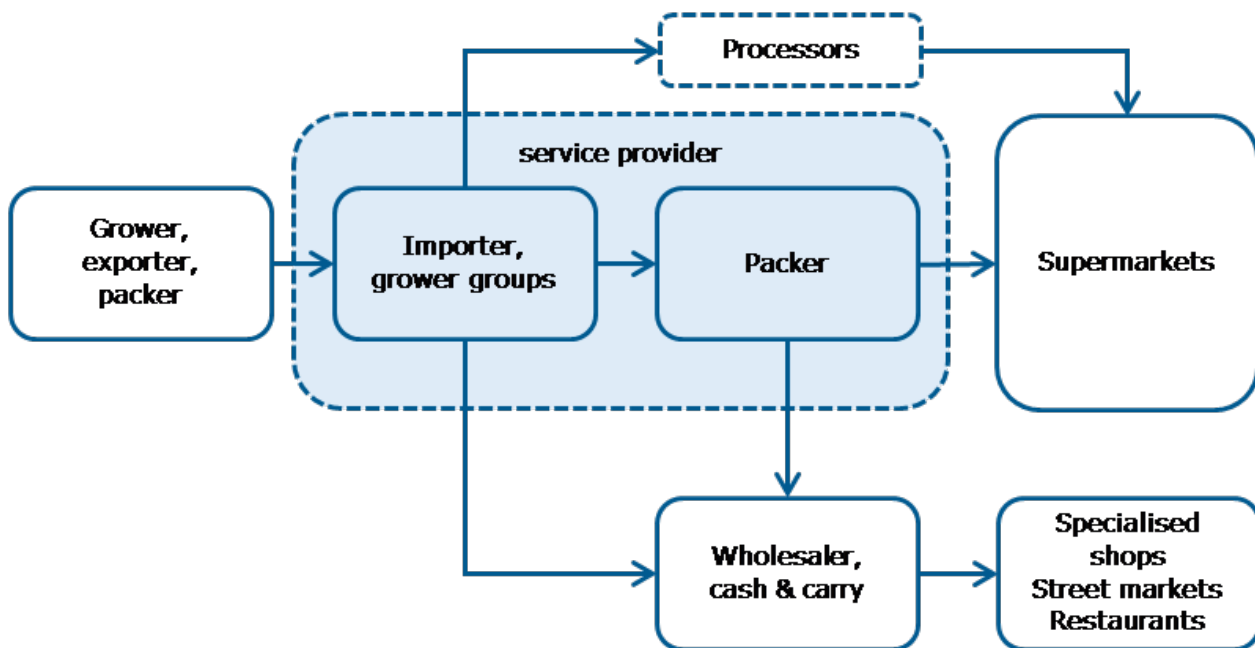
Wholesalers (spot market)

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, subject to trade 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



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. 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, offer full service and reliable volumes year-round, including supply from local sources.

The most likely route to become part of a retail programme is to cooperate with a service provider that has a local infrastructure and established supply contracts with retailers.

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 wholesale clients.

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.

3. 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. To compete, you need to have your own production, but the entry costs are high due to the large investment required for planting. Seasonality is the other main factor that defines your competition (see supply calendar in figure 5). 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, Chile, Peru and South Africa are strong suppliers with increasing volumes. In the north, your principal competitors are European producers, such as those in Spain, but also nearby countries, such as Morocco and Ukraine, which enjoy some degree of preference thanks to their close distance to the European market.

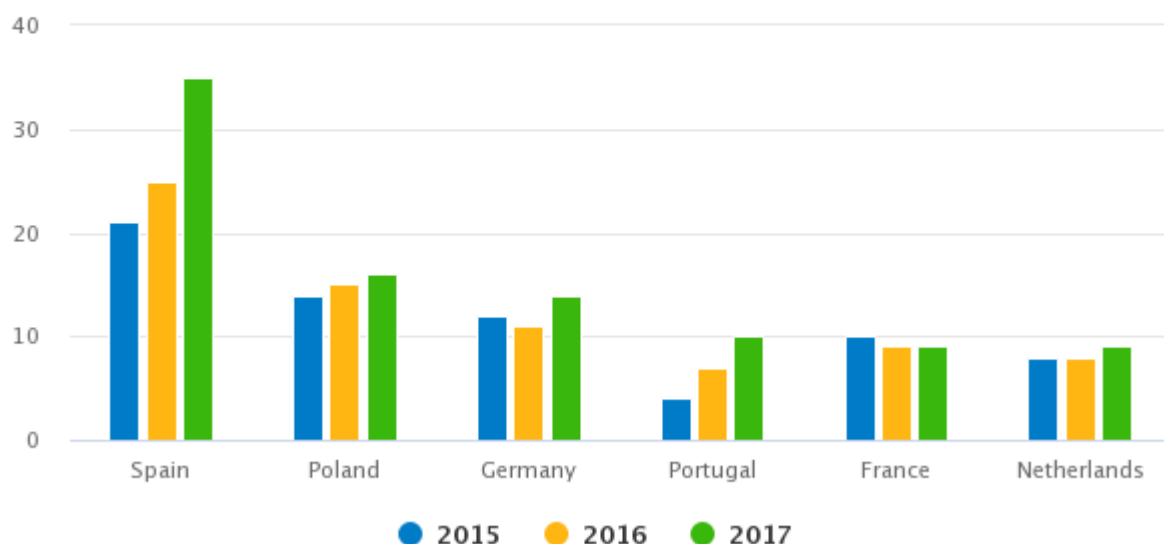
European production: Spain and Poland are leading suppliers

When local production is abundantly available, it is difficult for long-distance suppliers to sell on the European market. This is why volumes from the United States, Canada and Mexico are much smaller than from counter-seasonal producers Chile, Peru and South Africa.

Spain and Poland are the strongest European suppliers, but you will find blueberry production all over Europe. In fact, blueberry production is on the rise in most European countries (see figure 3).

Figure 3: Estimated production within the European Union in 2017 (according to Faostat)

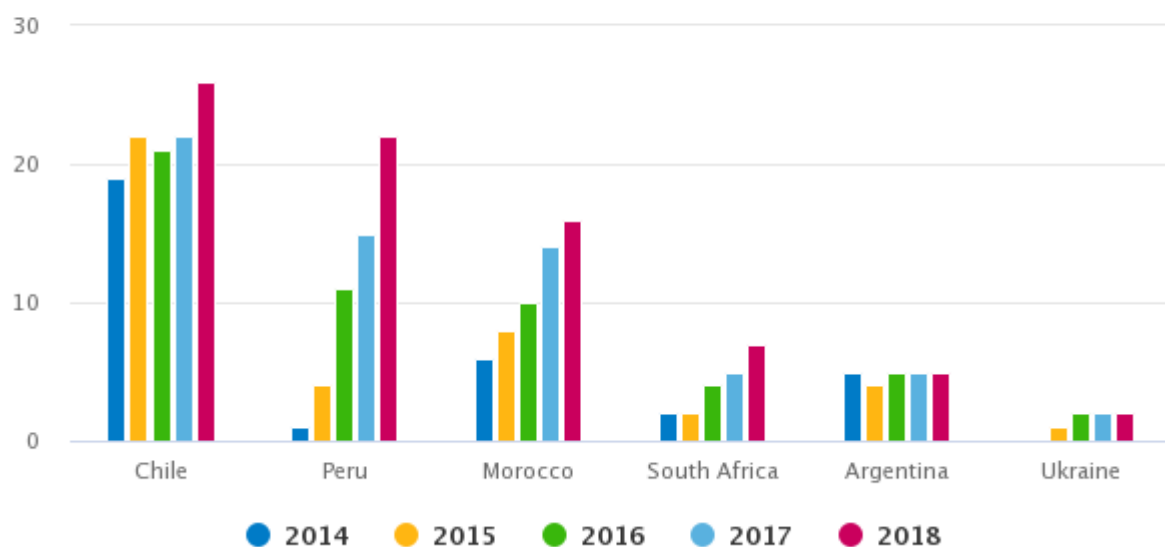
in 1.000 tonnes



Source: Faostat

Figure 4: Main non-European suppliers of fresh vaccinium berries (mainly blueberries) to the European Union

in 1,000 tonnes



Source: Eurostat / Market Access Database

Figure 5: Indicative blueberry supply calendar to Europe

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Mexico (Jalisco, Baja California)												
Marocco												
Spain, USA (south)												
France												
Portugal												
Netherlands												
Germany, Poland												
Canada, USA (north)												
Peru												
Argentina/Uruguay												
South Africa												
Chile												

Chile

Chile has been the leader in blueberries in the southern hemisphere for a long time (see figure 4). Chilean companies are highly experienced in breeding and cultivating some of the best blueberries in the world.

Their [expected fresh export volume for the 2019-2020 is 115 thousand tonnes](#). Chilean exporters are the most important counter-seasonal suppliers for the European market, shipping nearly 26 thousand tonnes of blueberries in 2018. Most Chilean blueberries exported to Europe are shipped to the United Kingdom and the Netherlands, but Spain is also increasing its imports 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. Expect growers in Chile to be innovative in production, increase organic production and [replace older blueberry varieties with new ones](#) with longer shelf life.

The experience and the advanced production knowledge in Chile can be a threat for new producers. But if your production is closer to Europe, it can be an opportunity to invest in your cultivation techniques and compete on your better market distance.

Tip:

Keep up with the developments in the leading blueberry producing countries. 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 from specific varieties.

Peru

Peru has had exponential growth in blueberry cultivation in the last four years (see figure 4). In less than a decade, Peruvian producers have built up a new blueberry sector and gained lots of experience. They mostly rely on the Biloxi variety, but they are also growing other blueberry varieties. Peru's current production volume is estimated at 78 thousand tonnes (2018-2019 season) and expected to exceed 120 thousand tonnes in the next two years.

Peruvian producers have the ambition to make the country the world's main exporter of blueberries in 2021, surpassing their South American neighbours in Chile. Keep in mind that Peru and Chile have an overlapping harvest season at the end of the year. Most Peruvian blueberries are shipped to the United States, but in Europe they have also become the second-largest non-European supplier.

There are several large blueberry producers in Peru and a relatively large share of small growers: 20% of all Peruvian producers have 10 hectares or less. This large presence of small producers is both a strength and a weakness for Peru. The scattered production over different areas makes the sector less vulnerable to adverse weather and gives Peruvian 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 [Agrodataperu.com](https://agrodataperu.com).

Morocco

Morocco is an up-and-coming producer of blueberries. There is no reliable data on the current Moroccan production to allow for projections, but blueberry exports from Morocco exceeded 18 thousand tonnes in 2018, growing from nearly nothing in one decade (see figure 4). Most of the Moroccan production goes to the European market. It is clear, however, that Morocco has not yet reached its peak.

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 Green Morocco programme (*Maroc Vert*) has made agricultural development a priority for the Moroccan government, encouraging private investment and exports. Several companies have recently invested in Moroccan blueberries: Australia's Costa Group became a majority stakeholder in African Blue in 2017 and the Spanish company Fresh Royal has its own blueberry plantations in Morocco. To a certain extent, Morocco's production relies on foreign investment, which makes its blueberry supply more dependable on the willingness of foreign investors.

South Africa

Unlike South American suppliers, South Africa mainly directs its blueberry export to Europe, especially to the United Kingdom. South Africa has been able to increase supply thanks to a rising production. [South Africa's growers produced more than 11 thousand tonnes](#) of blueberries in 2018, of which 72% was destined for fresh export. In 2019, the South African blueberry [production is expected to increase to 17 thousand tonnes](#).

Deep integration of South African businesses with British companies secures a market in Europe for South African blueberries, such as the case of [BerryWorld's joint venture](#) between South African grower Trevor McKenzie and the international blueberry company [Haygrove](#). The recent [opening of a large Fall Creek](#) nursery will contribute to diversity and new genetics for growers.

Argentina

Argentina used to be one of the principal counter-seasonal blueberry suppliers to Europe and remains among the top five largest. However, Argentina has not invested as much as Chile, Peru or South Africa; its [production area decreased by 57% in eight years](#) and exports to Europe have not grown in the past few years.

Argentina's producers suffered with the low prices in their supply window, mainly due to the large growth of Peruvian supply. Argentina's agricultural sector needs investment but economic instability in the country has not worked in its favour. Future blueberry production in Argentina will likely target niche markets, focusing on quality and organic fruit, in an attempt to differentiate it from the massive and productive supply from Peru.

The [recent opening of the Chinese market](#) for Argentinian blueberries and the [re-opening of the Israeli market](#) may offer better opportunities for Argentine producers, but they will continue to feel the pressure from other competitive suppliers.

Tip:

Lobby with blueberry producer organisations and authorities to open new markets for blueberries. Your national government can establish phytosanitary agreements and negotiate favourable import tariffs with other countries.

Ukraine

Blueberries have become one the [most popular fruits for cultivation projects in Ukraine](#), whose production is growing at an increasing rate. Most blueberry plantations in Ukraine started in recent years and the current planted area of 2.2 thousand hectares yielded an estimated 4.5 thousand tonnes of blueberries in 2018. According to experts, Ukraine's blueberry plantations will further grow in the future.

[Blueberry production in Ukraine is in its infancy](#) and still lacks the structure and level of organisation of blueberry growers in Chile, for example. But Ukraine's producers are catching up fast and they have the advantage of nearby the European Union market.

In addition to Ukraine, Serbia and other countries in Eastern Europe have been receiving foreign investments and subsidies, resulting in a fast growing and modern blueberry production using the latest technologies, yet small in volume for the time being.

Tips:

Monitor closely the developments in blueberry production in neighbouring countries. Blueberry

production is generally increasing everywhere, but watching the competition nearby may avoid oversupply problems during the same production seasons.

Invest in production techniques that increase your yield and product quality so you can position yourself against competitors. Find horticultural experts to get advice on the best production techniques for your region.

Who are you competing with?

There are several successful blueberry suppliers in various parts of the world. What they all have in common is a direct link with the cultivation, often of different varieties, and the ability and financial means to scale up and find strategic alliances.

Camposol: leading in volume and marketing

[Camposol](#) exported almost 25 thousand tonnes or just over US\$173 million of blueberries in 2018, which makes them the [leading Peruvian exporter](#) of blueberries. Of this supply, a 27% share went to Europe, accounting for 8% of all European blueberry imports from outside the EU.

Camposol's production season does not last the whole year, but their huge volumes and strong marketing allow them to trade with many large supermarket chains worldwide. In Europe, large retailers prefer larger suppliers because of supply consistency and compliance with quality and social requirements. Within Camposol's marketing strategy, they incorporated environmental and social commitments and launched their blueberry brand [The Berry That Cares](#) (TBTC).

Try to learn about the marketing efforts of the leading producing exporters, such as Camposol, but you must find your own identity and try to be original in your presentation.

Hortifrut: integrated from breeding to trade

[Hortifrut](#) is a major blueberry global player headquartered in Chile. It is a highly integrated company, both vertically and in production, including genetic breeding and cultivation alliances throughout the world.

Hortifrut's combination of breeding technology with year-round production is unique, giving it a strong competitive advantage. In Europe, Hortifrut and Spanish company Atlantic Blue founded [Euroberry](#) together to commercialise blueberries throughout Europe.

Having easy access to different varieties of blueberries and an integrated supply chain, like Hortifrut, makes it easier to negotiate bigger contracts with large buyers.

Tips:

Try to find funding to upgrade your company or establish strategic alliances. Size and integration matters 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](#).

Build a professional website to present a strong impression of your company. Follow the example of the leading blueberry suppliers, but present your own identity and unique strengths.

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 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.

Because it is strongly promoted as very healthy, blueberries have gained popularity over other soft fruit. However, price can be an issue. When prices for blueberries go up too much, it can be a reason for consumers to switch to other fruit as well as frozen blueberries, which are generally cheaper and just as easy to use.

Tip:

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

4. What are the prices for blueberries?

Blueberries can be a very profitable crop. That is why many growers started to plant blueberries, which led to a decline in price after 2016. Product availability is crucial for price developments during the year. Until 2016, the demand was large enough for prices to rise, but in 2017 and 2018 production volumes pushed prices back to the level of 2014.

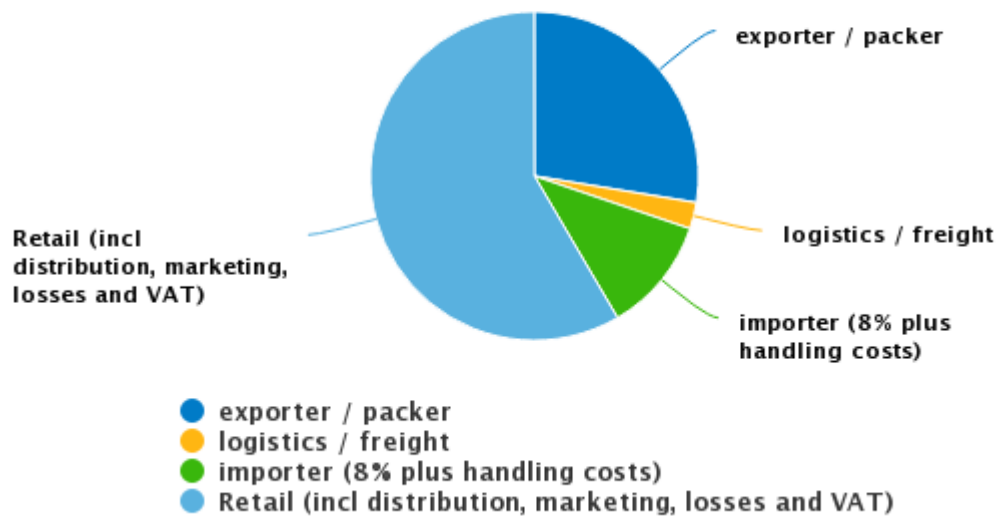
Be aware that oversupply can dramatically decrease prices in certain periods. For example, just before the summer of 2019, [Freshplaza](#) reported that Spanish growers received €2/kg due to excessive volumes on the market, while retail prices were still at €19/kg. Blueberry's trade price is determined according to availability and market demand, season, origin and quality.

General wholesale prices for 12 x 125 g packages (1.5 kg) can be €6 to €7 euros on the low side, up to €11 to €15 euros in a good market. If you work with an importing company or trader, expect to pay them around 8% commission plus handling costs.

Retail prices are usually between €12 and €24 per kilo. Small packages with premium blueberries are the most expensive. Organic blueberries are sometimes sold for more than €24/kg. Be aware that retail prices have no relation with trade prices.

Figure 6: Indicative price breakdown for consumer packed blueberries

in € per kilo



Source:

Tip:

Look at indicative wholesale prices on [FreshFruitPortal](#) and [France Agrimer](#) (search for 'myrtille' in French), which will provide a rough indication of the market value of blueberries.

This study has been carried out on behalf of CBI by [ICI Business](#).

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