



## Exporting fresh blueberries to Europe

Strong promotion and a growing demand for healthy, easy-to-eat food have resulted in a substantial increase in the European consumption of blueberries as well as a worldwide boost in production. Retailers and their service providers are now able to source blueberries all year round. Meanwhile as a supplier you will find yourself in an increasingly competitive market. To survive on the long term on the European market you need to be well integrated into the supply chain and provide a consistent and superior quality product.

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## 1 . Product description

Blueberries are part of the genus *Vaccinium*. There are three types of blueberries, the highbush, lowbush, and a half-high hybrid. The most common blueberry for cultivation is the highbush type. There are many varieties of blueberries with each their own specifications in size, flavour and cold hardiness.

Other berries that are found within the genus *Vaccinium* are bilberries, a European variety that is similar to the blueberry, cranberries and cowberries.

In this factsheet we will use the statistics of all the *Vaccinium* varieties. It is assumed that blueberries are sometimes included in the trade statistics of other berries of the genus *Vaccinium*.

Table 1: Combined Nomenclature (CN) commodity codes

Number	Product
0810400000	Cranberries, bilberries and other fruit of the genus <i>Vaccinium</i>

0810401000	Cowberries, foxberries or mountain cranberries (fruit of the species <i>Vaccinium vitis-idaea</i> )
0810403000	Fresh fruit of species <i>Vaccinium myrtillus</i> <i>European Blueberry or Bilberry</i>
0810405000	Fresh fruit of species <i>Vaccinium macrocarpum</i> and <i>Vaccinium corymbosum</i> - <i>American Blueberry and Cranberry</i>
0810409000	Other <i>possibly including blueberries among others</i>

Source: Eurostat Comext

## 2 . Which European markets offer opportunities for exporters of blueberries?

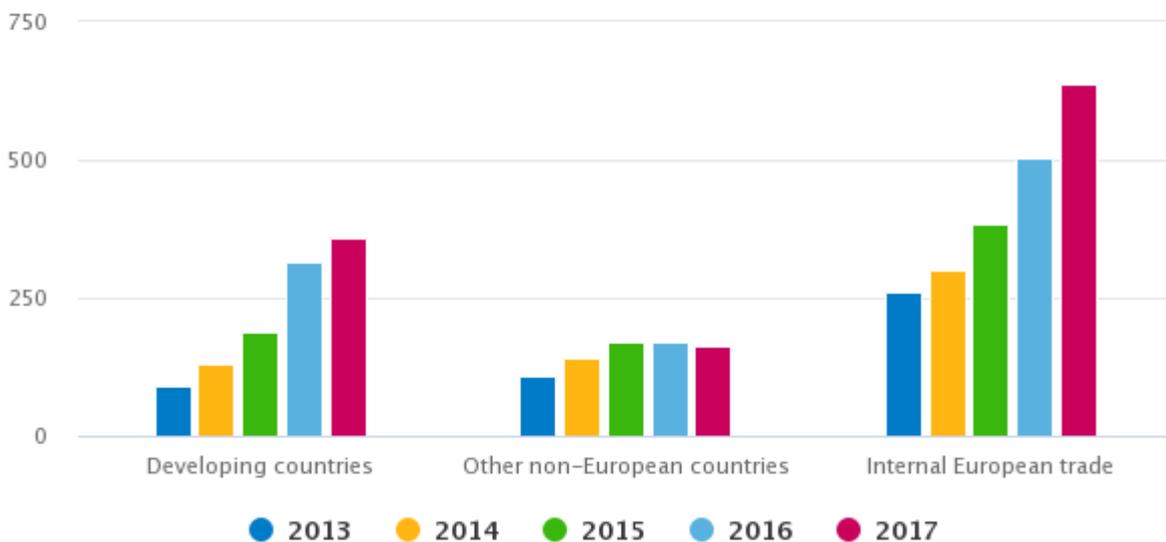
### Import from developing countries doubled in five years

The fast expanding import of blueberries into Europe can be contributed to the greater supply volumes from mainly Chile, Morocco and Peru. The demand is expected to continue its growth, although nobody knows its true potential.

The average consumption in Europe is still lower than northern America, where blueberries are much more common. The USA and Canada are also the largest producers. Considering the size of their local markets and their similar seasons to Europe, southern countries are better positioned to benefit from the European growth. This is notable in the strong and increasing supply from for example Chile and Peru.

Figure 1: Estimate of the European import of fresh berries of the vaccinium variety (mainly blueberries)

in € million



Source: ITC Trademap

### Tip:

- Keep up to date with the global developments of blueberries by following international news sources such as the [Overview Global Blueberry Market on Freshplaza](#), the [market updates of Rabobank](#), or the [market intelligence of Agriculture and Agri-Food Canada](#).

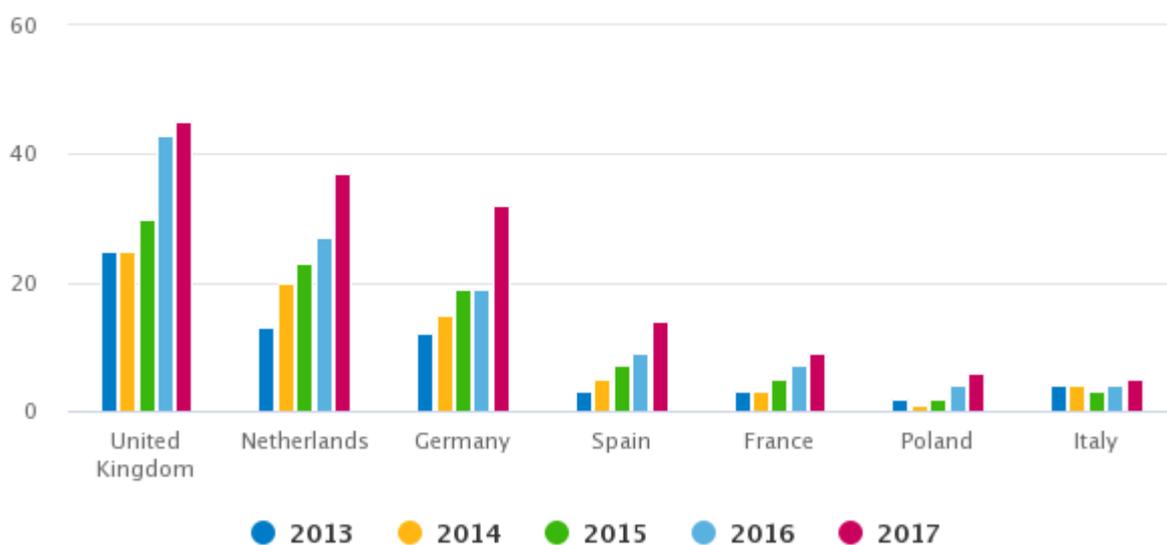
## Northern Europe offers most opportunities for blueberry imports

Most of the current imports from third countries enter the United Kingdom (€66 million) or the Netherlands (€62 million). The United Kingdom leads blueberry consumption in Europe and registered a specifically strong import growth from Spain in 2016 and 2017 compared with preceding years. However, [Brexit](#) may have an effect on imports in that it may drive prices down. The Netherlands play an important role as a trade hub. In terms of total consumption, Germany is the second largest market.

In these countries you can expect to find leading importers or traders of blueberries who have experience with long distance suppliers. Spain is one of the main entrance points into Europe for suppliers in Morocco.

Figure 2: Main European importers of berries of the genus *Vaccinium* (mainly blueberries)

in 1,000 tonnes



Source: ITC Trademap

### Tip:

- As a new supplier rely on the experience of larger import countries such as the United Kingdom, the Netherlands and Germany.

## Southern Europe has potential for growth as consumption is still low

Because northern European countries such as Poland, Germany, France and the Netherlands,

traditionally grow more berries than the south, they are used to having a higher consumption. For example, in Scandinavian countries wild berry picking is a popular outdoor activity.

In southern Europe, blueberry consumption is still relatively small. But the increasing production volume helps develop a local market. According to the Association of Polish Fruit Growers, Spain has become the largest producer (and exporter) of blueberries in Europe. This creates opportunities for exporters that are able to supply during the off-season.

The production data in most international sources is out of date. According to Faostat, for example, Spain produced 6.4 thousand tonnes of blueberries in 2016, while their trade balance for berries and blueberries of the genus *Vaccinium* was 32.7 thousand tonnes. You can expect European production volumes to be higher than indicated below.

Table 2: Estimated harvest of high bush blueberries in Europe, in 1,000 of tonnes

Country	2010	2015/2016	Changes
Spain	1.7	27.0	1488%
Poland	9.2	14.0	52%
Germany	8.3	9.5	15%
Portugal	0.3	4.5	1400%
Netherlands	0.3	3.8	1167%
Italy	1.4	2.9	107%
France	11.0	2.8	-75%
Great Britain	-	2.2	-
Austria	-	0.84	-
Finland	-	0.15	-
Sweden	2.8	0.06	-98%
The Czech Republic	-	0.00	-

Source: The Association of Polish Fruit Growers, based on the data of Faostat, Eurostat, USDA, IBO, IAFE

### Tip:

- Use the wholesale markets [Mercabarna](#) (Barcelona) or [Mercamadrid](#) (Madrid) as starting points when considering to export to Spain, or visit the [Fruit attraction trade fair](#).

### 3 . Which trends offer opportunities on the European market for fresh blueberries?

#### Attention to health food

Consumers in Europe are becoming more aware of health issues and pay more attention to their diet. This trend has a positive impact on the marketing of fresh blueberries.

Blueberries are known to contain high quantity of vitamin c and dietary fibre. It is important to understand that the promotion of health benefits is a major influence on the commercial success of blueberries.

#### Production and promotion are contributing to the blueberry consumption

The blueberry industry will continue to promote blueberries to boost consumption. Suppliers worldwide are attempting to profit from the growing popularity of blueberries. This has resulted in many new production projects. Production and product promotion have become essential factors for the current consumption growth.

Although industry sources still see opportunities to continue to develop the blueberry market, nobody knows how far this can be stretched. When investing in blueberry production, you must be aware of the risks and volatility in supply and demand.

#### Tips:

- Stay informed: If possible, visit international conferences such as the [Global Berry Congress](#) or the [International Blueberry Organisation Summit](#) and subscribe yourself for industry newsletters.
- Make sure to have established the right client relations before investing in blueberry production.
- Evaluate the possibility of joining a producers association to increase your promotional reach.

#### Preference for local seasonal products can affect external supply

Consumers are becoming more conscious about seasonal fruit and there is a growing preference for local produce. Thanks to advancing storage technologies European producers will also be able to extend their season. The extended seasons and the preference for local products can pose a risk to future import from long-distance suppliers.

Currently a significant part of the berry demand is still met by imports. As a non-European supplier your best chances remain during the off-season periods.

#### Blueberries are a convenient snack or ingredient

The European consumer has an increasing preference for fruit that is easy to consume or easy to use. Blueberries can be packed in different sizes and are an excellent option as a snack or as an ingredient in for example desserts.

Snack packages are especially popular in north-western Europe, such as in [Germany](#), [the Netherlands](#) and [the UK](#). Remember that your packaging has to be attractive to the consumer.

Blueberries are also a well appreciated addition to yoghurts, cereals, sweet pastry or fruit shakes and salads. Both fresh and frozen blueberries are used as ingredient.

### Tip:

- Offer different packing options to your client. Blueberry is a multifunctional fruit and there are different ways to sell it concerning packaging and mixing.

## Consumer experience has become a success factor

Blueberries are often a product of indulgence. European consumers like to treat themselves, therefore you must consider their experience has become an important success factor for your product. Especially when dealing with experienced buyers of blueberries, who appreciate premium quality, you can distinguish yourself with superior quality and taste.

### Tips:

- Select the blueberry varieties that suit best your client's market. Yield and production costs are important for your competitive position, but a superior taste will help you to become a preferred supplier.
- Ensure that supply chain logistics and transport processes do not affect product taste in any significant way. Using attractive packaging will also distinguish your product.

## Consumers expect a sustainable product

Supply chains are becoming more transparent and consumers are well informed about environmental and social issues. They expect your product to have a sustainable approach to production and processing. Remember that negative news in your supply chain can put consumers off.

Buyers act on this by requiring transparency and certifications from your company. Social and environmental certification schemes include actions to strongly reduce and register the use of pesticides, take action on the safety of employees and/or even include price guarantees for producers.

If your certifications are in line with the [Global Social Compliance Programme \(GSCP\)](#), you will have a better chance of being accepted by European supermarkets.

### Tips:

- Check the [Global Social Compliance Programme \(GSCP\)](#) website for more information about social and environmental conduct.
- Read more about [which trends offer opportunities on the European fresh fruit and vegetable market](#) on the CBI market intelligence platform.

4 . Which requirements should fresh blueberries comply with to be

## allowed on the European market?

### Which legal and non-legal requirements must your product comply with?

#### Minimise pesticides

Pesticide residues are one of the crucial issues for fruit and vegetable suppliers. The European Union has set maximum residue levels (MRLs) for blueberries. Expect buyers to be extra alert on residue levels for blueberries because they are consumed directly as a whole. Northern Europe is an important market for blueberries and supermarkets there tend to be stricter in residue levels than the European regulation. This means you have to control your production process very precisely.

#### Tips:

- Use the European [MRL database](#) to find out the MRLs that are relevant for fresh blueberries. You can search the database for your product or the pesticide used and find the list of the MRLs associated with your product or pesticide.
- Reduce the amount of pesticides by applying [integrated pest management](#) (IPM) in production. IPM is an agricultural pest control strategy that includes growing practices and chemical management.
- Read more about [MRLs at the EU Export Helpdesk](#) and always check with your buyers if they have additional requirements on MRLs and pesticide use.

## Quality

For blueberries the shelf life is a very important quality feature. They should arrive sufficiently matured but not overripe.

The minimum quality states that fresh blueberries must be:

- Intact and sound;
- clean, practically free of any visible foreign matter;
- practically free from pests;
- practically free from damage caused by pests;
- free of abnormal external moisture;
- free of any foreign smell and/or taste.

The condition of the products must be such as to enable them:

- to withstand transport and handling;
- to arrive in satisfactory condition at the place of destination.

To reach the best qualification, which is often a minimum in Europe, blueberries must be practically free of agglomerated berries. Also they must be practically covered with bloom, according to the varietal characteristics.

The marketing and quality standard is included in the [standard for berry fruits of the United Nations Economic Commission for Europe \(UNECE\)](#).

There is another (older) [standard for quick frozen blueberries in the Codex Alimentarius](#).

Conformity checks are part of European [Regulation \(EC\) No. 1580/2007](#). In the event of non-compliance your product can be rejected. In certain third countries local inspection bodies are allowed to carry out pre-export checks.

## Tips:

- Make sure you supply the quality as agreed in the product specifications and discuss with your buyer which additional certificates are required. These requirements vary between countries and market segments.
- Make sure the post-harvest handling, including cooling, is well organised to ensure product quality and shelf life. Investing in an un-interrupted cold chain is crucial for berries.

## Size

The size requirements depend on the specific buyer. Most importantly, you are expected to supply the size you agreed with and ensure uniformity in size.

If you are looking for an example in size standards for blueberry, you can take the [United States Standards for Grades of Blueberries](#) as an indication:

- Extra large. Less than 90 berries per cup (237 ml or ½ pint);
- Large. 90 to 129 berries per cup;
- Medium. 130 to 189 berries per cup; and,
- Small. 190 to 250 berries per cup.

## Packaging

Blueberries are most often packaged in plastic punnets, such as clamshells. These punnets are then placed in a cardboard crate. Punnets can be directly sold to retailers, or the berries are re-packed in different packaging. Punnets usually have a weight size of 125 (individual snack size) to 500 grams.

As an exporter you need to ensure that the packaging will protect the blueberries from contamination, leakage, and dehydration. The [UNECE standard for berry fruits](#) states that berry fruits must be packed in such a way as to protect the produce properly:

- The materials used inside the package must be clean and of a quality such as to avoid causing any external or internal damage to the produce.
- The use of materials, particularly of paper or stamps bearing trade specifications, is allowed, provided the printing or labelling has been done with non-toxic ink or glue.
- Packages must be free of all foreign matter, except for incidental leaves and twigs for wild berries.

## Tips:

- Consider packaging to be part of your presentation. Discuss the packaging requirements with your buyer.
- See also the [Recommended International Code of Practice for Packaging and Transport of Tropical Fresh Fruits and Vegetables \(CAC/RCP 44-1995\)](#).

## Labelling

Food placed on the European market must meet the legislation on food labelling.

On the label or marking of each box should at least be the following information:

- Name and physical address of the packer and/or dispatcher;
- Product name;
- Country of origin;
- Commercial specifications: Class, size and weight;
- Traceability code (for example [GlobalGap Number](#) (GGN) (recommendable);
- Officially recognised code mark such as a [Global Location Number](#): The name and address of the packer or dispatcher can be replaced by an official control mark.

For pre-packages you must also:

- Include the name and the address of a seller established within the European Union with the mention 'Packed for:' or an equivalent mention.
- Use a language that is understandable by the consumers of the country of destination.

For organic produce you must include the European [organic logo](#) and the code number of the control authorities.

### Tips:

- For detailed information on labelling, see the [Codex Alimentarius on food labelling](#) for the labelling of pre-packaged foods and the European [Regulation \(EU\) No 1169/2011 on the provision of food information to consumers](#).
- Make sure to consult your client for buyer-specific requirements concerning labelling. Supermarkets in particular usually make additional demands.
- Consult the [EU Trade Helpdesk](#) for a full list of requirements for fresh fruit, including blueberries, selecting the product code: 08104000

## 5 . Which additional requirements do buyers often have?

### Certification as guarantee

Since food safety is a top priority in all European food sectors, you can expect most buyers to request extra guarantees from you in the terms of certification.

The most commonly requested certification for blueberries is [GLOBALG.A.P.](#), a pre-farm-gate standard that covers the whole agricultural production process, from before the plant is in the ground to the non-processed product (processing is not covered). Whether GLOBALG.A.P. is required also depends on the destination country, market conditions and market channel. For example, it has become nearly impossible to supply northern Europe without GLOBALG.A.P. since it is a standard requirement for most supermarkets.

Examples of other food safety management systems that can be required are:

- [BRC](#) (British Retail Consortium)
- [IFS](#) (International Food Standard)
- [FSSC22000](#) (Food Safety System Certification)
- [SQF](#) (Safe Quality Food Programme)

These management systems are supplemental to GLOBALG.A.P. and are recognised by the [Global Food Safety Initiative \(GFSI\)](#).

### Tips:

- Identify the food-safety management systems that are usually requested in your target market. Expect GLOBALG.A.P. to be one of them.
- Read more on the various food-safety management systems at the [Standards Map](#) website.
- Always remember that food safety is a major issue. Work proactively with buyers to improve food safety, taking care to be transparent and remain up to date with regard to buyer requirements and regulations.

## Social and environmental compliance

There is growing attention for the social and environmental conditions in the producing areas. Most European buyers have a social code of conduct which they will expect you to adhere to. As regards blueberries, social compliance is important, and for most large retailers this is a must, although product quality is top priority.

For blueberries it can be a plus to be [GRASP](#) certified. In social certification GRASP, which is part of GLOBALG.A.P., is most accessible and gaining in importance.

Another good option is implementing standards recognised by the [Sustainability Initiative Fruit and Vegetables](#) (SIFAV). This comprises an initiative from traders and retailers to become 100% sustainable in sourcing from Latin America, Africa and Asia by 2020.

### Tips:

- For a complete overview of buyer initiatives for social compliance, see the [buyer requirements for fresh fruit and vegetables](#) on the CBI marketing intelligence platform.
- Examine your company's current performance, for example by completing a self-assessment on the [BSCI website](#).
- Consult the [Standards Map database](#) for additional information and to learn about differences between fair-trade labels.

## 6 . What are the requirements for niche markets?

### A growing niche market for organic blueberries

An increasing number of consumers prefer food products that are produced and processed by natural methods. The market for organic blueberries is still small, but with a growing demand, especially in German speaking and Scandinavian countries. The supply is limited.

In order to market organic products in Europe, you have to use organic production methods according to [European legislation](#) and apply for an organic certificate with an accredited certifier.

### Tips:

- Consider organic as a plus, not as a must, and be prepared to comply with the whole organic process. Remember that implementing organic production and becoming certified can be expensive.

- For more details about organic produce as a requirement, see the [CBI buyer requirements for fresh fruit and vegetables](#).
- Read more about organic farming on the [Soil Association website](#).
- Find importers that specialise in organic produce that understand the market and have access to this niche market. Use databases such as [Organic-Bio](#).

## 7 . What competition do you face on the European blueberry market?

### More competition from worldwide producers

The overall competition is increasing while production volumes are becoming substantial. The principle producers remain the United States (250,000+ tonnes), Canada (180,000 tonnes) and Chile (100,000+ tonnes). According to the [U.S. Highbush Blueberry Council \(USHBC\)](#) North American production has a growth perspective of over 400,000 tonnes in four years.

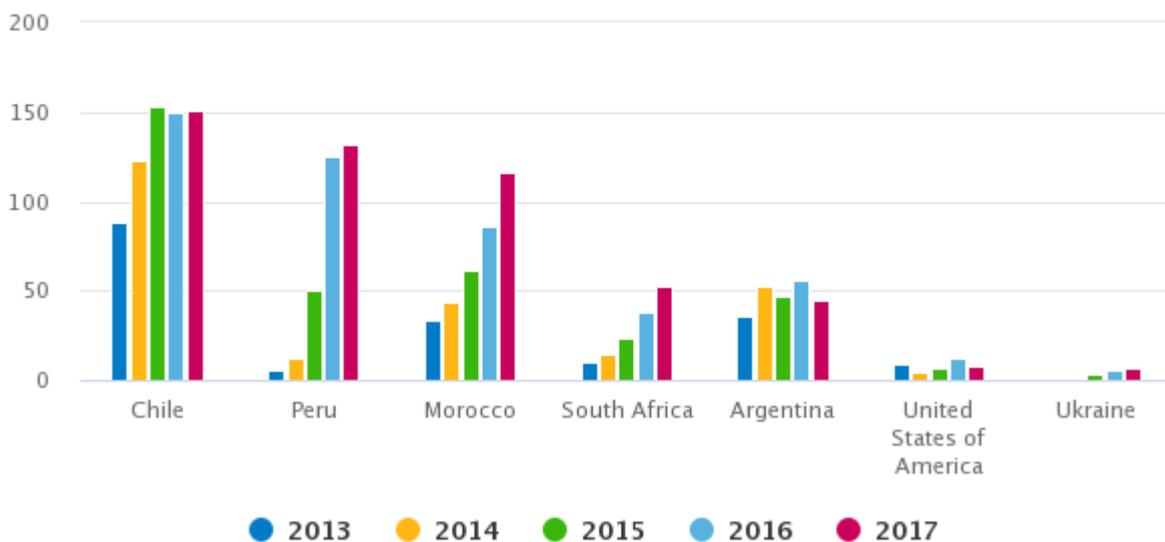
But new countries are emerging fast such as Peru, Mexico and Morocco. Countries south from the traditional producing regions are trying to fill the supply gaps in Europe. Europe imports a large volume of blueberries from Chile, Morocco and Peru. South Africa and Argentina are not far behind. These countries are most important to look at when analysing your competitive landscape.

Nevertheless, Chile's supply to Europe has stabilised due to a pest problem and decreasing quality. It shows how important high-quality produce is for the European market.

Furthermore, new markets are opening up. For example, China has opened its borders to Peruvian and Argentinian blueberries. This means Europe will have to fight harder in order to maintain a stable supply and will look for alternative suppliers in for example South Africa.

Figure 3: Main suppliers of berries of the genus *Vaccinium* to Europe (mainly blueberries)

in € million



Source: ITC Trademap

### Tip:

- Try to read news and publications regularly to see what other exporters are saying, for example on [Freshplaza](#) and the [Fresh Fruit Portal](#). You can also use these channels to promote your company and inform your buyers.

## High cost of entrance

The investment to start blueberry production is high due to the high costs of the plants, inputs and protective infrastructure. On top of that are certification costs required by the European market. This hampers small and low finance growers to participate in the blueberry supply to Europe. Also, as a new player you are more likely to lose on your investment if the market turns around.

Changes in the demand or the preferred variety are common in the fresh fruit trade. The urgency to anticipate fast developments in demand and varieties of blueberries affects suppliers worldwide. The ability to invest and financial strength are often critical factors to remain in business.

### Tip:

- Look for cooperation or even integration with trusted client relations. More and more importers are interested in getting more directly involved in production, however, do not expect your buyer to bear all your costs.

## Scale and professional performance have become key

Entering the European market is a big hurdle for many companies, primarily because of certification and meeting buyer requirements. Successful growers are very professional and have scaled up their production. For small companies it has become harder to compete.

In Europe large retailers prefer larger suppliers because of supply certainty and compliance with quality requirements. As a supplier of fresh blueberries to European retailers you are not in a position to argue about the rules of the game. Your buyer will switch easily to other suppliers if expectations are not met.

### Tips:

- Contact an experienced importer before entering the European market, especially if you are aiming for major retailers.
- Establish a credible track record including transparent information on your company and product quality. Being part of a stable partnership and supply chain can help you to establish and maintain your position on the market.
- Read the [tips for doing business with European buyers](#) on the CBI market intelligence platform.

## Buyers source according to the seasons

Your buyer will likely prefer to have a year round supply of blueberries, especially when he is working with retail contracts. Therefore they carefully choose their suppliers and buy according to the seasons to obtain the best quality. Local sourcing has the preference, although price is leading. As a supplier you must be aware of your competition with overlapping seasons.

You can try to extend your season through excellent post-harvest and storage conditions, but this can be very challenging when competing with the competitors from in-season regions.

Table 3: Blueberry supply calendar

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

### Tips:

- Compare your supply window with those of other suppliers.
- Find more general information use the same platform to read about the [competition you are facing on the European market for fresh fruit and vegetables](#).

## 8 . Through which trade channels can you get fresh blueberries on the European market?

### Traders become producers to supply supermarkets

Large retail organisations want to buy their blueberries as close to the source as possible. This way they have more control and transparency. For fresh fruit traders it is a trigger for getting more involved in production and are starting to participate in farming companies. This phenomenon also works the other way around with large producers investing in a sales office abroad becoming importers of their own products.

To become a successful supplier for large volume buyers you have to be prepared to integrate your business. Supermarkets demand a reliable volume and full service in packaging and logistics.

### Tip:

- Find partnerships with service providers that can strengthen your position and help you to

enter major retail programmes. Check also the [CBI tips for finding buyers on the European fresh fruit and vegetables market](#).

## Specialised importers

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. There are specialised importers in the European market that deal with soft fruit. These importers can help you get your blueberries into supermarkets and wholesale markets. Working closely with an experienced importer is also a good way to reach many different segments such as smaller shops and niche segments.

### Tips:

- Connect to importers by visiting trade fairs such as the [Fruit Logistica](#) in Berlin and [Fruit Attraction](#) in Madrid or use their online catalogues.
- Consult the CBI market intelligence platform with general information about [the channels through which you can get fresh fruit and vegetables onto the European market](#).

## Blueberries as an ingredient

As blueberries are becoming a common product in the fresh department of supermarkets, food processors and the professional food market are eager to adopt it as well.

The food industry offers access for processed blueberries such as pulp. Brands attract consumers by marketing blueberries in products such as [ice cream](#), [yoghurt](#), [juice](#), [breakfast cereals](#) and [bakery products](#).

Cash & carry wholesalers, such as the [Metro group](#), for the professional market are more likely to sell larger packings and frozen blueberries. They supply food services such as restaurants and catering.

The scale of your production matters, but expect prices for frozen and processed blueberries to be less attractive than for fresh ones. However, it can be an interesting option for your berries that are not suitable for the fresh channel.

## 9 . What are the end market prices for fresh blueberries?

The consumer prices for blueberries depend on several factors, such as quality, origin and packing size. Generally you can find them for around 15-20 euros per kilo and 22-24 euros for organic. Frozen blueberries are sold for less, approximately between 6 and 9 euros per kilo.

As an exporter you have to be aware that there is not always a direct relation between trade prices and consumer prices.

Trade prices for blueberries have been declining slightly due to the extensive global competition in blueberry production.

### Tip:

- Find information about consumer prices in the online assortment of supermarket chains such as [Tesco](#) (English: "blueberries"), [Albert Heijn](#) (Dutch: "blauwe bessen"), [Rewe](#)

(German: "heidelbeeren"), [Carrefour](#) (French: "myrtille") and [Mysupermarkt.co.uk](#).

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