

The European market potential for fresh blueberries

Last updated:

06 February 2023

Blueberries in Europe have become popular as a healthy and easy-to-snack fruit. Consumers in the United Kingdom and Germany are especially fond of blueberries. Regional differences in consumption predicts further growth of blueberries throughout Europe. The growing demand is being met by an enormous increase in supply, so as a supplier it is important to stay ahead of the competition with innovative cultivars and monitor supply and demand carefully.

Contents of this page

1. [Product description](#)
2. [Which European countries offer most opportunities for blueberries?](#)
3. [Which trends offer opportunities or pose threats on the European blueberry market?](#)

1. Product description

Blueberries are part of the genus *Vaccinium*. The main types of blueberries are highbush, lowbush, rabbit eye and half-high hybrid varieties. The most common blueberry for commercial cultivation is the (northern) highbush type. There are many varieties of blueberries each with their own characteristics in terms of size, growing season, flavour and cold hardiness.

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

In this factsheet we will use the statistics of all the *Vaccinium* varieties. The main imported berries of the *Vaccinium* genus are blueberries, and it is possible that these are registered under different sub-codes.

Harmonised System (HS) code	08104000 Cranberries, bilberries and other fruit of the genus <i>Vaccinium</i>
Harmonised System (HS) code Sub-classification	<ul style="list-style-type: none">• 08104050 Fresh fruit of species <i>Vaccinium macrocarpum</i> and <i>Vaccinium corymbosum</i> (American blueberry and cranberry)• 08104030 Fresh fruit of species <i>Vaccinium myrtillus</i> (European blueberry or bilberry)• 08104010 Cowberries, foxberries or mountain cranberries (fruit of the species <i>Vaccinium vitis-idaea</i>)• 08104090 Other (possibly including blueberries among others)

Types of blueberries	<ul style="list-style-type: none"> • Northern highbush (<i>Vaccinium corymbosum</i>) • Southern highbush (<i>Vaccinium darrowii</i>) • Lowbush or wild blueberries (<i>Vaccinium angustifolium</i>) • Rabbiteye (<i>Vaccinium virgatum</i>) • half-high hybrids
Cultivars commercial varieties	Many different varieties are used depending on local climate and circumstances, early & late season coverage and characteristics.

What makes Europe an interesting market for blueberries?

Blueberries have been expanding fast in Europe and a growing supply will continue to push the consumption of blueberries. The unused potential makes Europe an interesting market, but you must be aware of market speculation and overproduction.

Popularity of blueberries continues to rise

The European blueberry market has expanded rapidly over the past years. Both demand and supply are expected to continue to grow, although nobody knows its true potential. Suppliers can take advantage of the strong demand, but at the same time must count on increasing price pressure due to a higher availability of blueberries worldwide.

Greater supply pushes the market forward

Over the course of five years, Europe's blueberry trade increased by €1 billion to a total value of €2.1 billion in 2021. Approximately 39% of this value concerned the import from developing countries.

Until now, the fast-expanding imports of blueberries into Europe could be contributed to the greater supply volumes from mainly Chile, Peru and Morocco. But new planting and production has been on the rise everywhere, counter-seasonal as well in and around Europe: in Spain and Poland, in the Ukraine, Serbia and Morocco and further away.

COVID-19 has had no negative impact on demand

Blueberries are a typical retail fruit in Europe and they also score well as a healthy snack. The COVID-19 pandemic has had little impact on blueberry sector growth. Instead, retail promotions and focus on health have boosted the growth of blueberry consumption during the pandemic years. The main obstacle in the supply chain have been the lockdowns and the low availability of resources in the producing countries, mainly resulting in delays. As an exporter, if you are able to manage your production, packing and logistics well, you can continue to supply the European market.

Declining prices make way for mass consumption

The supply side is looking for the boundaries of the European potential. Inevitably this has affected the product value. The average price trade price of blueberries has been in a downward trend since 2016. Prices seem to have hit rock bottom in recent years.

Despite the ever-increasing supply and lower average prices, Europe continues to import more blueberries every year. With lower trade prices, retailers are able to offer attractive prices and promotions making the blueberry an accessible berry fruit for European consumers.

Opportunities for cost-efficient companies

A year-round demand of low-priced blueberries has forced suppliers to become more productive, more efficient and to consistently provide high-quality fruit. According to [Rabobank's reporting](#), there will be opportunities for value-added supplies and cost-competitive firms. Yet the demand for high quality is also increasing, so simply focusing on supplying commodity blueberries may not be enough.

Blueberry has become a market for high-level suppliers. Larger, merged companies have the advantage. In 2021 the world's largest blueberry company [Hortifrut, acquired Atlantic Blue](#) to expand its production into Morocco and supply Europe year-round. With Atlantic Blue's genetics they also strengthened their breeding capabilities. When you want to be among the leading blueberry suppliers to Europe, you need to secure varieties and invest in consistent quality and a year-round supply.

Tips:

Read the suggestions of British Columbia Blueberry Council on [how to keep your business environment safe](#) during the COVID-19 pandemic.

Make sure to have excellent commercial connections for your product before investing in blueberries. In Europe you can find and meet potential partners and buyers on the [Fruit Logistica trade fair](#). Think twice when starting new plantations. The increasing volumes make the market nervous, so it is better to focus on existing orchards or varietal renewal.

Read about the [increasing competition in the blueberry sector](#) and [how to do business with European buyers](#) on the CBI market intelligence platform.

Differences in consumption point to further expansion

Differences in consumption rates indicate that there is still a margin for further expansion in several European regions. But as a supplier it is important not to overestimate the market and secure your sales with steady buyers.

Global differences in consumption

Both on a global and European level there are large differences in blueberry consumption. A rough calculation based on production, import-export volumes and news sources points out that Europe is still far behind the United States and Canada (Table 1). Approximately 55% to 70% of blueberry availability is destined for fresh consumption. Based on the current consumption estimates in the United States and Canada it is safe to assume that you will see the blueberry market expand further in Europe in the next several years. Rabobank specialists confirm that [Europe is now the main source of the growing demand](#).

European differences in consumption

Within Europe there are significant differences in consumption too. The United Kingdom leads the consumption in Europe with an estimated 1kg per capita, which is far more than the European average of 0.6kg. Only Poland and the Netherlands have a higher calculated use of blueberries, but this is likely due to the dominant role of Dutch logistics and Polish production. The [International Blueberry Organization](#) (IBO) notices strong demand in northern Europe such as the United Kingdom, but also sees great opportunities for growth in countries such as Spain, France and in the Eastern part of Europe.

Enthusiasm motivates the market

There is great enthusiasm for the European market. Estimates vary, but according to the blueberry breeder Fall's Creek European consumption could be close to [360 g per person by 2026](#). This calculates to an additional demand of 80,000 tonnes in less than four years. Global production volumes and retail promotions will determine how much blueberries will finally be sold in the market.

Table 1: Estimates of annual blueberry consumption per capita in 2021 (including processed)

China	0.2-0.4kg
Europe	0.5-0.6kg
United States	1.5-1.8kg
Canada*	3-4kg

Source: calculations and industry sources (*Canadian consumption includes wild or low-bush blueberries. Consumption per capita of commercially-grown varieties is similar to the United States)

Tips:

Stay up to date with market developments by subscribing to newsletters and following [market updates from Freshplaza](#), [Fruitnet](#), the [International Blueberry Organization](#), [FruiTrop](#) and [FreshFruitPortal](#) or other news sites.

Participate in international berry congresses to get better insights into the blueberry industry, for example the [Global Berry Congress](#), the [International Blueberry Organization's \(IBO\) Summit](#), or seminars by [Blueberries Consulting](#).

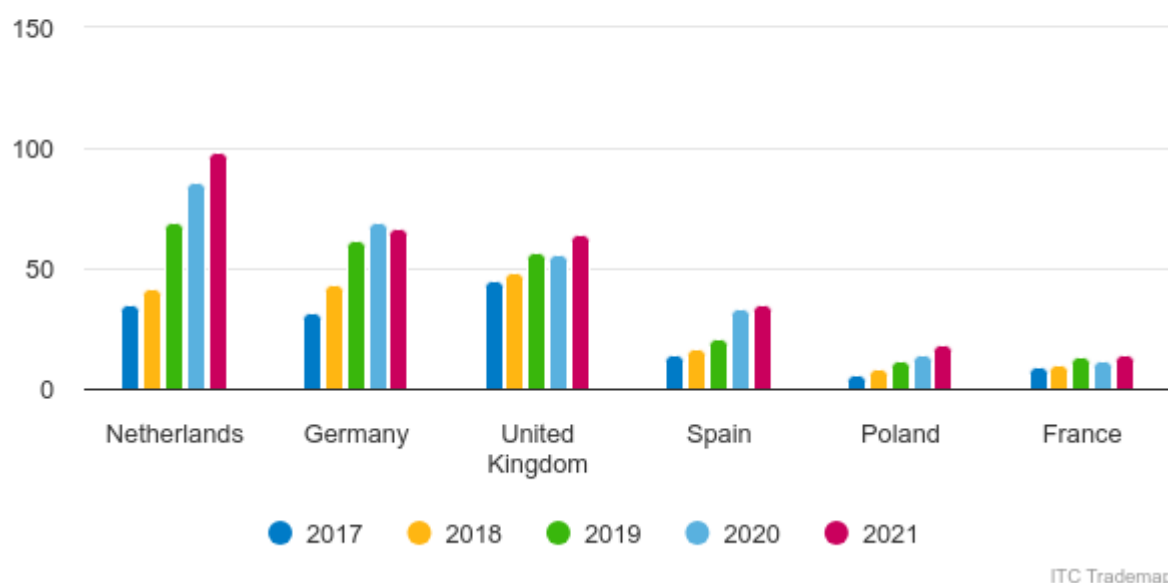
Read up on the blueberry industry and markets in the [Global State of the Blueberry Industry Report 2022](#) from the International Blueberry Organisation (IBO).

2. Which European countries offer most opportunities for blueberries?

Germany and the United Kingdom are the leading markets for blueberries, although the United Kingdom is closest to reaching maturity. A large and increasing part of the European supply is traded (and packed) in the Netherlands. Local production can also be a motivation to increase imports outside of the local season, which can be seen in Spain and Poland. In other parts of Europe, including France and Eastern Europe, there is untapped potential for blueberries.

Figure 2: Main European importing countries of fresh vaccinium berries (mainly blueberries)

In 1,000 tonnes



ITC Trademap

Table 2: Blueberry production in Europe in 1,000 tonnes

	2015	2016	2017	2018	2019	2020	2021
Europe*	61.1	66.92	86.48	106.32	133.98	154.58	166.25
Spain	21.06	24.95	35.36	43.52	53.38	48.52	61.23
Poland	14.10	14.72	16.34	25.30	34.77	54.10	55.40
Portugal	4.44	6.57	9.84	11.06	15.16	15.42	17.14
Germany	11.95	10.71	13.81	12.76	14.85	11.30	15.64
Netherlands	7.37	7.70	8.30	9.30	11.06	9.20	8.50

Source: Eurostat. (* including estimations)

The Netherlands: a good place for the distribution of blueberries

The Netherlands has become the largest importer of blueberries in Europe. Most blueberries were distributed outside the country. It is an important market when you are looking for an easy way to supply several European markets.

The Dutch market has grown together with the increasing European demand. The total volume of imported blueberries in 2021 was 98,000 tonnes (see Figure 2) and another 8,500 tonnes was added from its national production (see Table 2). More than 75,000 tonnes were (re-)exported. Most blueberries were re-exported to Germany. Belgium, United Kingdom, Poland and Scandinavia are important destinations to reach via the

Netherlands as well. The rest was absorbed by the Dutch consumption or processing industry.

Among Dutch consumers blueberries have become the most popular soft fruit after strawberries, which are being produced locally on a large scale. The Dutch market for blueberries still relies more on imports. But there is a strong potential to increase production. The International Blueberry Organization (IBO) has called the Netherlands one of the hotspots of blueberry investments in Western Europe. Only the current cost of energy is holding back greenhouse production. Dutch growers are stretching their seasons with different varieties and cooperative structures, trying to compensate for their high production costs.

Competition from Dutch growers is expected to increase between July and mid-September. Nevertheless, the Netherlands will remain an important re-exporter of blueberries throughout most of the year.

Tip:

Make use of Dutch traders when you have difficulties in entering different European markets – find a selection of importers on the [member list of the Dutch Fresh Produce Centre](#). Dutch importers often have wide experience in trading and are familiar with the different European preferences. Dutch fruit companies have a no-nonsense mentality. So, calling or visiting them often works better than e-mailing.

Germany: most potential for blueberry consumption growth

With its high and fast-growing volume, Germany is the country with the most potential for blueberries in Europe at the moment. But requirements can be strict. Suppliers that are price competitive and able to deal with the required quality standards can find an attractive market in Germany.

Recently (2019) Germany overtook the United Kingdom in import volume. Germany's blueberry imports increased from 32,000 tonnes in 2017 to 67,000 tonnes in 2021. German growers added another 15.600 tonnes to the imports. While volumes are rising, packaging has become more diverse, with larger sizes of for example 500g. Larger-sized packaging often carries a premium. [Germany is also the main destination for frozen berries](#) in Europe.

Most blueberries come from Spain (almost 21,000 tonnes) and Germany itself. Retailers prefer to source blueberries from nearby with the guarantee of a clean and sustainable production. Locally produced blueberries are often organic certified – almost 10% of the blueberry production area was organically-certified in 2020. But Germany is also a price-conscious market and this makes buyers shift to more economic sources when available, such as Morocco or Poland. In the off-season Peru and Chile (often shipped through the Netherlands) take over most of the supply.

To supply long-distance blueberries to Germany, you will have to give attention to quality and sustainability. For example, [South African growers have started to promote their efforts](#) to improve their potential on the German market. This includes supporting local communities, the use of renewable energy, reforestation strategies, biodiversity growth, and the implementation of detailed waste-reduction and recycling programmes.

Tip:

Expect to put extra effort into product documentation and certification ([GlobalGAP](#), [IFS](#), [organic](#)) to supply the German market. You can best focus on clean, competitively-priced, or adding extra value by supplying organic blueberries.

United Kingdom: market leader in blueberry consumption

The United Kingdom is market leader in blueberry consumption per capita. For both European and non-European suppliers, it is one of the largest markets. Maturing demand and price pressure may slow down future growth compared to other European countries.

Berries, including blueberries, have the biggest share in the fruit production of the United Kingdom. But campaigns such as [Love Fresh Berries](#) promote berries year-round. Blueberries are relatively new but they have become very popular as a superfood or snack fruit. They are often used as an ingredient, for example in porridge, drinks and muffins. Blueberries are available in packages of multiple sizes.

Blueberries are popular all year round and supplied by a large number of countries. The average annual consumption reached an estimated 1kg per capita. This makes it one of the largest, but also one of the most mature markets for blueberries in Europe.

According to news sources, [British production reached 4,600 tonnes](#) in 2021. This is still in stark contrast to the 64,000 tonnes of blueberries that were imported. There are several international blueberry companies in the UK, such as [Angus Soft Fruit](#), [BerryWorld](#) and [S&A Produce](#). But despite the UK's ambition to promote British-grown berries, the country lacks the necessary human resources to really increase local production. Many foreign workers left the country following Brexit (Britain's decision to the European Union).

Slow domestic production and less favourable trade relations with the EU have opened the doors for alternative suppliers with a similar supply window, such as Morocco. Import from Morocco increased fivefold between 2020 and 2021, to a volume of 8,100 tonnes.

Spain: new opportunities for Moroccan suppliers

In Spain future growth can be expected, if not through local production, then by increasing import volumes. But Spanish blueberry suppliers stay close to their own season. Therefore, opportunities are not limited to a counter-seasonal supply. Instead, Spain imports most from Morocco to complement its local production.

Blueberry consumption continues to grow every year. Compared to most northern-European markets, Spain's consumption is still underdeveloped. Despite the limited consumption, the country has grown to become the largest producer and the fourth-largest importer of blueberries. Most blueberries are destined for other markets, in particular Germany and the United Kingdom – the two largest blueberry consuming countries. With a total export volume of 90,000 tonnes Spain is Europe's principal source for blueberries.

Spain is mainly focused on a seasonal supply with a peak from April until June. But the introduction of early varieties can bring Spain onto the market as early as next February. During this period Spain exports most of its production but also imports blueberries from Morocco. Morocco puts competitive pressure on Spanish growers and is responsible for 75% of Spain's import volume of 35,000 tonnes. Some of the Spanish companies have extended their season and improved their competitiveness by integrating with growers or investing in cultivation projects in Morocco. At the same time local production continued to grow to 61,000 tonnes in 2021. The concentrated period of a strong supply from Spain, Morocco and Portugal often results in lower trade prices.

Tip:

[Visit the Fruit Attraction fair](#) to find blueberry alliances. This is especially useful if you can complement Spanish blueberry production.

Poland: blueberries are an important crop

With a strong production of more than 55,000 tonnes, blueberries are an important crop in Poland. The country has a long tradition of blueberry cultivation, but is also among the fastest growers in import.

Exports in 2021 (nearly 24,900 tonnes) exceeded Polish imports (17,600 tonnes). But blueberries are imported year-round. This is a good sign that Polish consumers are developing a taste for blueberries also outside their local season. Blueberry imports in 2021 were three times higher than five years earlier. Spain supplies Poland just before the local season starts. The off-season demand is mainly fulfilled by Peruvian and Chilean blueberries traded through the Netherlands and Germany.

The main export markets for Polish blueberries are Germany and the United Kingdom. Poland is also well-positioned to supply the eastern European markets.

Consumption is increasing and price is an important motivation for Polish consumers to purchase blueberries. The average value per imported kilo was slightly lower than in Germany and the Netherlands. This means that price-competitive suppliers are best aligned to get their blueberries into Poland.

Tip:

Focus on price-competitive blueberries when Poland is your final market. If you want to supply Poland directly you can find many blueberry professionals at the [International Blueberry Conference](#), held in Poland. Keep in mind that English is not yet a common language for business in Poland.

France: slow but steady growth

Blueberry demand in France is developing slower than one might expect. The current consumption rate leaves room for further expansion. For off-season suppliers it can take longer to set foot on this typical and seasonal market.

France has the third-largest population in Europe and is therefore among the main markets for blueberries. However, the consumption has emerged much slower than in Germany and the United Kingdom. The reason for this is most likely the preference for local fruit that French farmers produce themselves such as stone fruit and raspberries, but also European blueberries (bilberries). French consumers make a strong [distinction between wild and cultivated blueberries](#).

Just as in Spain and Italy, consumption in France is still low, but professionals anticipate a continuous and steady growth in these conservative markets. And with reason; French imports have shown a stable growth in the past five years.

There is strong demand for locally-produced blueberries, but the actual cultivation of American blueberries is marginal. However, clear data on French production is lacking. The Syndicate of Blueberry Producers (SPMF) wrote that, in 2019, [French blueberries only accounted for 11% of the consumption](#). The current production will be a few thousand tonnes at the most.

With a minor production, France will not be able to cover future growth. Spain and Morocco have already stepped into this gap, becoming France's main suppliers. Volumes from Peru and Portugal are also gradually rising. Currently, Spain is responsible for half of the 13,800 tonnes of imported blueberries in 2021. France will continue to depend on these external suppliers. The strongest demand is within the French and European season, but off-season demand will eventually increase as well.

Tip:

Find more information through the links above. Use the translator function of your browser to read the information in English.

3. Which trends offer opportunities or pose threats on the European blueberry market?

Consumer interest in easy and healthy snacks is one of the main success factors for blueberries. Innovation in new cultivars will perfect blueberry quality and increased production per hectare. On top of that, strong promotion and product availability will further boost the market and keep blueberries affordable for consumers. However, clean and fresh blueberries from local sources are preferred.

All about varieties and quality

The costs of blueberry cultivation, packaging and logistics are on the rise. At the same time the market requires high and affordable quality. Cultivars that produce higher quality fruits are expected to play a more significant role.

Higher costs in combination with the need for quality are the drivers behind extensive breeding programmes. Taste is considered the most important by professional growers. A high yield and quality berry can improve profitability.

For long distance suppliers, durability has become a main concern. Logistical delays in getting fruit to market have affected exports. When exporting blueberries from Peru or Chile to the European market, more durable cultivars can be beneficial.

Success in the blueberry sector has always been related to high investments. But the search for a perfect and affordable berry in a high-cost and competitive market has become a survival-of-the-fittest situation. Large grower operations such as [African Blue](#) in Morocco have had the support of variety breeding programmes, in this case from the Costa Group. Initially a joint venture between Moroccan business partners, Costa Group and Total Produce UK, African Blue has now become one of the main Moroccan suppliers to the European market.

Tip:

Find cooperation opportunities with blueberry breeders, nurseries and commercial partners to integrate your supply. For small, independent suppliers it has become very difficult to manage in the blueberry business. Well-known blueberry breeders include, [Planasa](#) and [Fall Creek](#).

Health leads to clean and sustainable blueberries

Consumers in Europe are becoming more aware of a healthy diet. The COVID-19 pandemic resulted in a greater need for healthy foods. The fast growth of blueberries can be attributed for a large part to consumers who are looking for healthy foods. This is why it is extra important to meet the consumer expectation of supplying a clean, sustainable and pesticide-free product.

Blueberries are known to contain high quantities of vitamin C and dietary fibre. It is important to understand the

impact and the promotional value of the health benefits of blueberries. Today you can find blueberries in all kinds of foodstuffs, in which they are used to add value with their healthy image.

New product launches that use blueberries as a healthy ingredient strengthen the image of blueberries. Such products also include important claims such as additives/preservatives free, environmentally friendly packaging and organic. A company that took organic seriously is [King Berry](#) in Argentina. King Berry even [obtained a biodynamic certification](#) that allows them to be part of a very specific market. There are also developments in the packaging that make blueberries a better choice, for example the [100% recyclable punnets in the British ASDA supermarkets](#).

Tips:

Find ways to reduce pesticides by using natural or integrated pest management (IPM) such as the [Blueberry IPM Manual of Northwest Washington](#). Check your country for similar guidelines for pest management.

Only start with organic production if local circumstances allow for it. For example, hydroponic cultivation is not permitted for organic certification in Europe.

Blueberries respond to the interest in snack fruit and easy ingredients

The European consumer has an increasing preference for fruit that is easy to consume or easy to use. This means your product is likely to be packed for consumers. When packing at point of origin, make sure your packaging is suitable and attractive for the European consumer.

Blueberries can be packed in different sizes and are an excellent option for consumers as a snack. Snack packages are especially popular among retailers in north-western Europe, such as in Germany, the Netherlands and the United Kingdom. The increasing supply has opened up the market for larger sized retail packages of 500g or more.

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

Figure 3: Example of attractive packaging by [Angus Soft Fruits](#)



Source: Photo of by [ICI Business](#)

Figure 4: Example of wholesale packaging at the Rungis market in Paris



Source: Photo of by [ICI Business](#)

Tip:

Offer different packaging options and sizes to your buyers. Also take sustainability into account and try to reduce plastic: for example provide top seal closures instead of lids.

Promotion and production continue to develop markets

Production and product promotion have become essential factors for the current consumption growth. When investing in blueberry production, you must be aware of the risks and volatility in supply and demand.

The blueberry industry and promotional organisations such as the [International Blueberry Organization](#), [Fruits from Chile](#) and the [U.S. Highbush Blueberry Council](#) continue to promote blueberries to boost consumption. Subsequently, worldwide suppliers attempt to meet the growing demand by increasing their production capacity. This has resulted in many new production projects and plantings all over the world.

It is the dynamic of promotion and production that keep markets developing further. And although industry sources still see opportunities to continue developing the blueberry market, nobody knows how far this can be stretched.

Preference for local seasonal products

There is a growing preference for local produce. When products are available from local sources, you will have more difficulties to put your product to market. This is usually the case unless you have a significant competitive advantage, for example in price or a superior variety.

Consumers are becoming more conscious about seasonality and there is a common notion that fruit from local growers is more sustainable. Thanks to advancing storage technologies and different blueberry varieties, European producers will also be able to extend their season. The extended seasons and the preference for local products can pose a risk for the future import from external suppliers.

Currently a significant part of berry demand is still met by imports. In the long-term Europe can become more self-sufficient during their main production period. As a non-European supplier your best chances are during the off-season periods or at the beginning or end of the European production season.

Tips:

Diversify your markets so you can optimise profit during your specific supply season.

Read the [CBI Trends in fresh fruit and vegetables](#) to get more insights into fresh trends that can benefit your growth.

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

Please review our [market information disclaimer](#).