

***BLUEBERRY
TRENDS AND
MARKET
CHALLENGES***

Blueberries™

U.S. HIGHBUSH BLUEBERRY COUNCIL



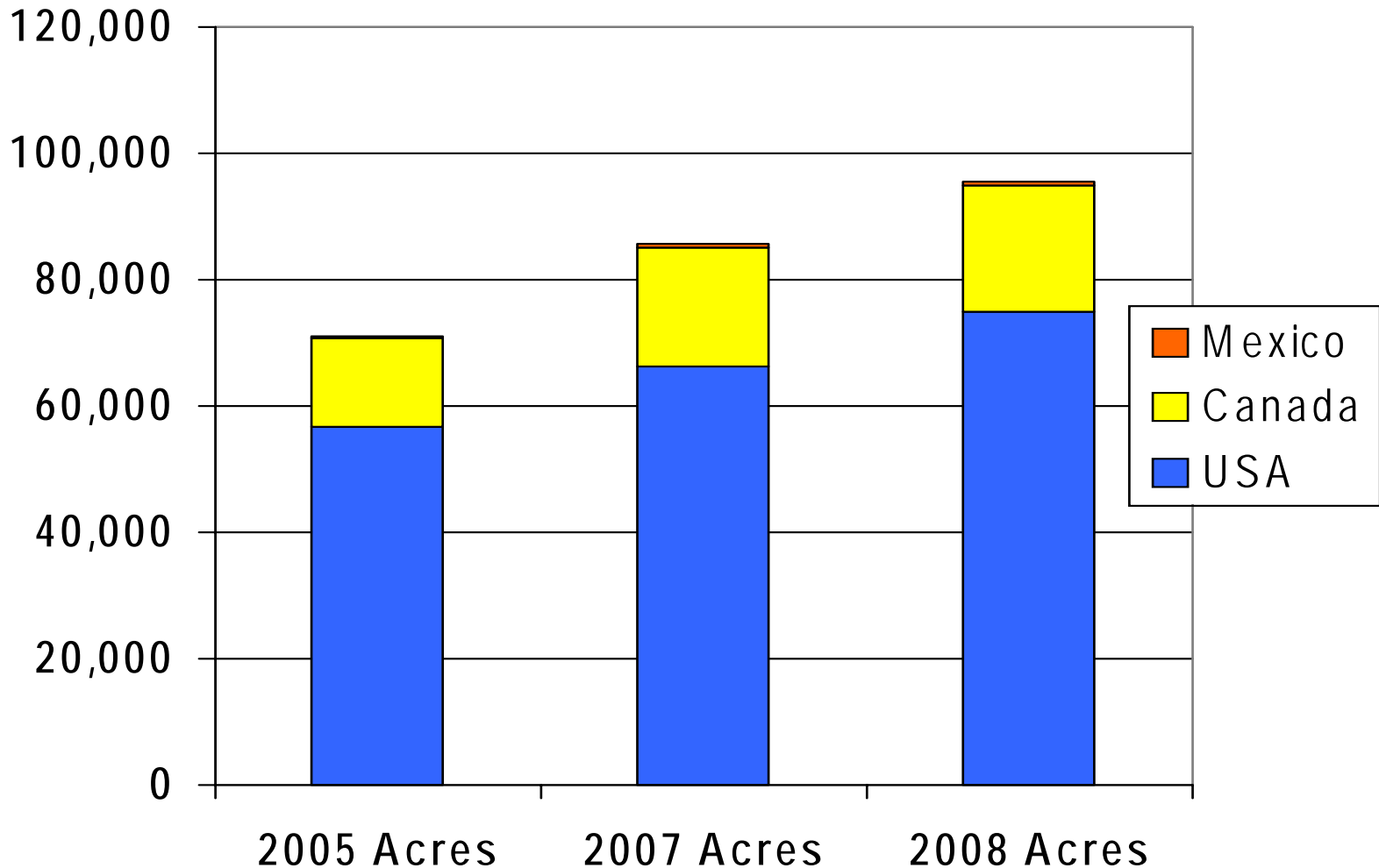


BLUEBERRY MARKET SITUATION

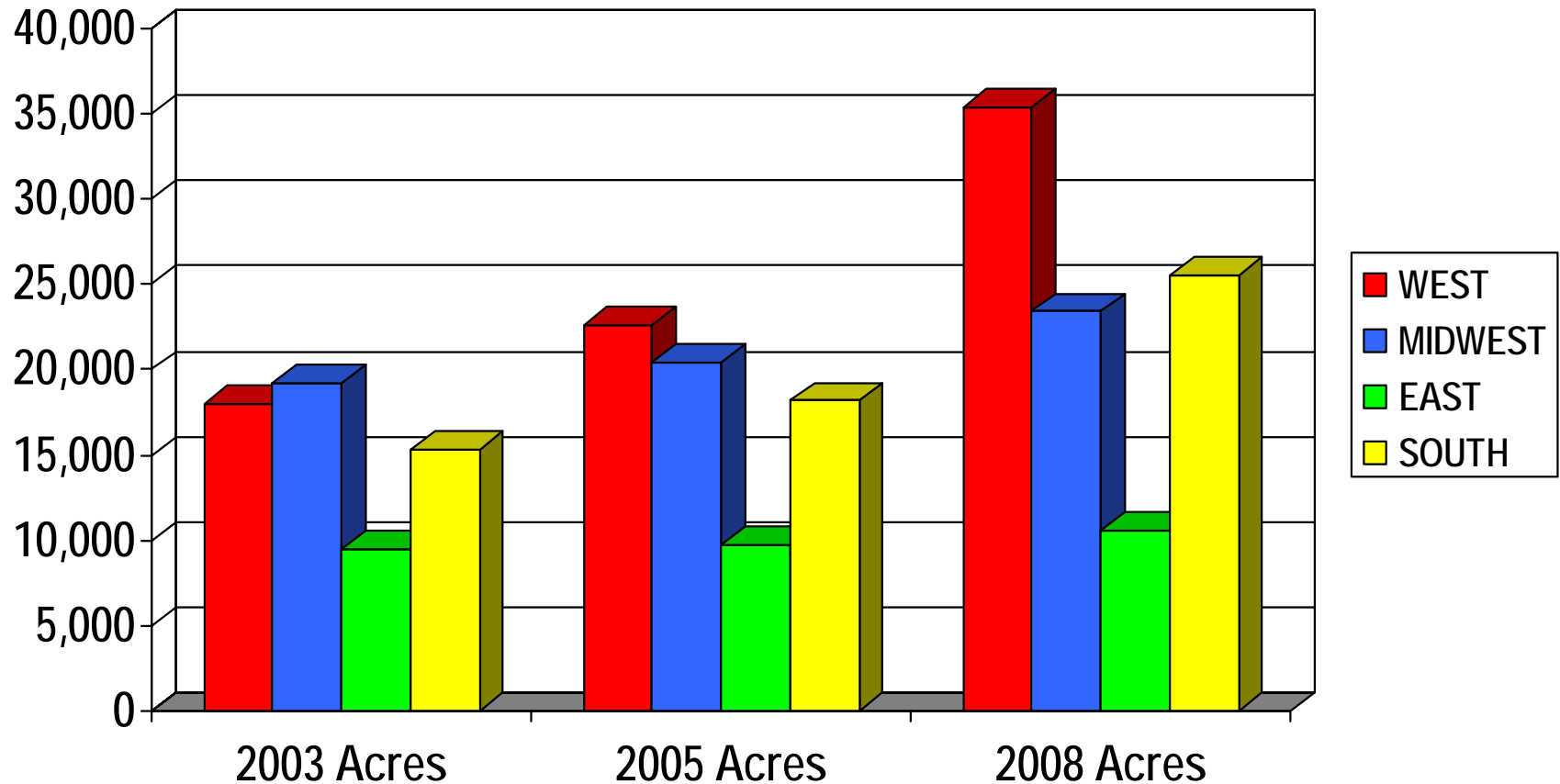
- Health Interest Continues to Drive Blueberry Demand
- Blueberry Interest Encourages Increased Worldwide Blueberry Production
- Industry Efforts Needed to Keep Demand Ahead of Supply

NORTH AMERICAN Highbush Blueberry Acreage Estimates- 2005 to 2008

An Increase of +33% in Three Years from 71,000 Acres to More Than 95,000 Acres

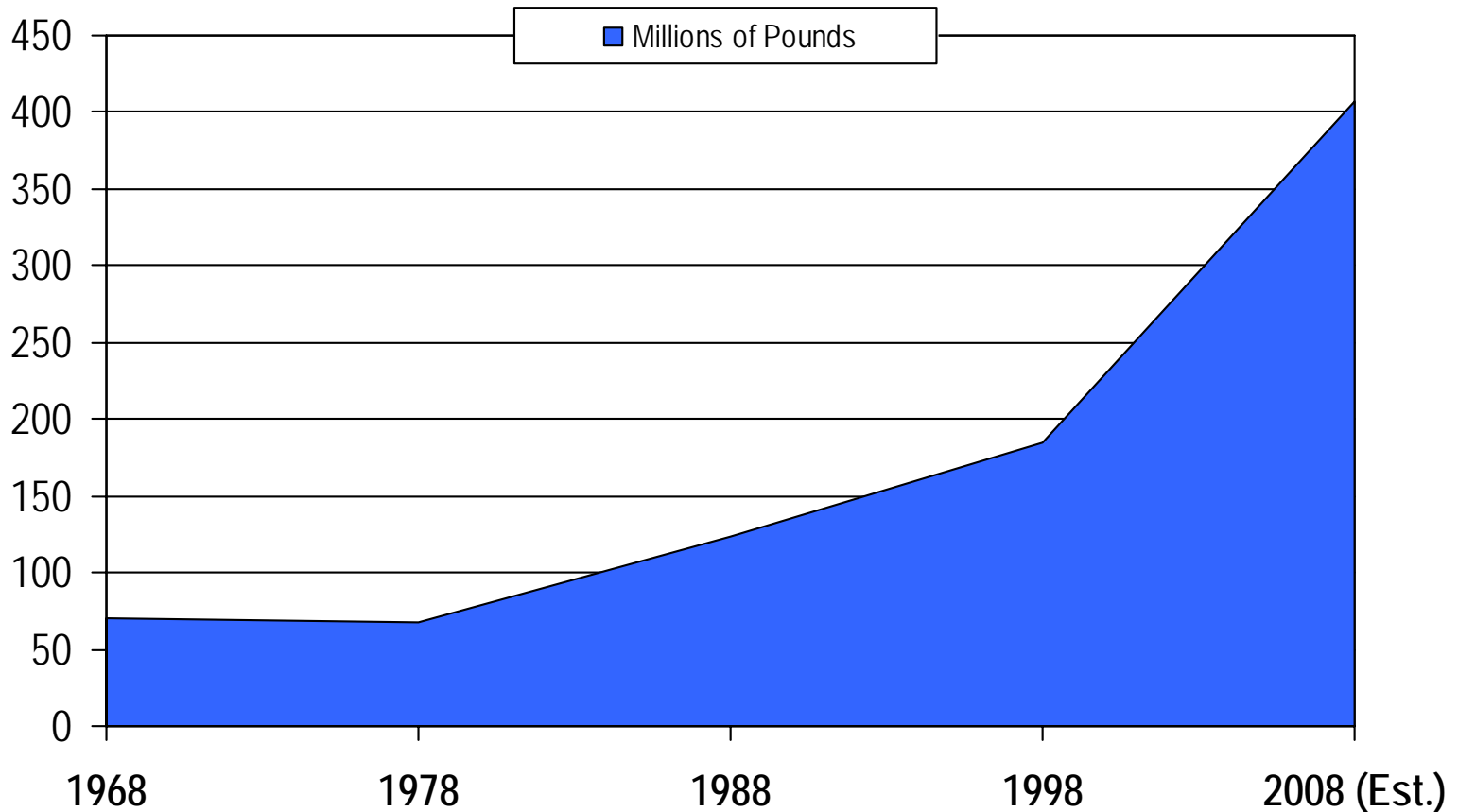


NORTH AMERICAN Highbush Blueberry Acreage Estimates 2003 to 2008



Impressive Acreage Growth in Western and Southern States Over the Past Five Years While Traditional Growing Areas Remain Fairly Constant, Though New Higher Yielding Varieties Replacing Some Bushes on Existing Acreage

NORTH AMERICAN Highbush Blueberry Production 1968 to 2008

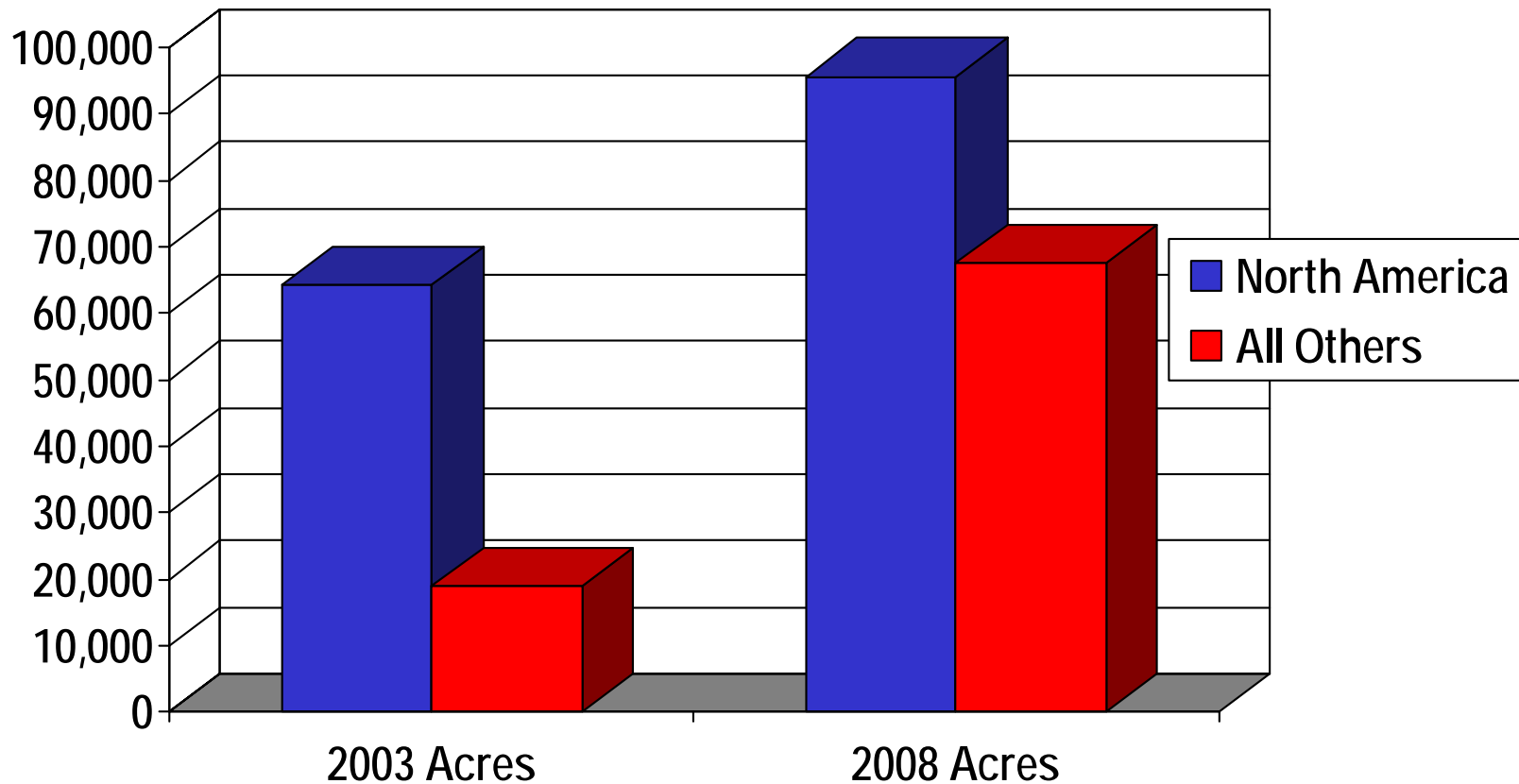


Production has increased more than five fold over the past 40 years from 71 million pounds in 1968 to an estimated 407 million pounds in 2008

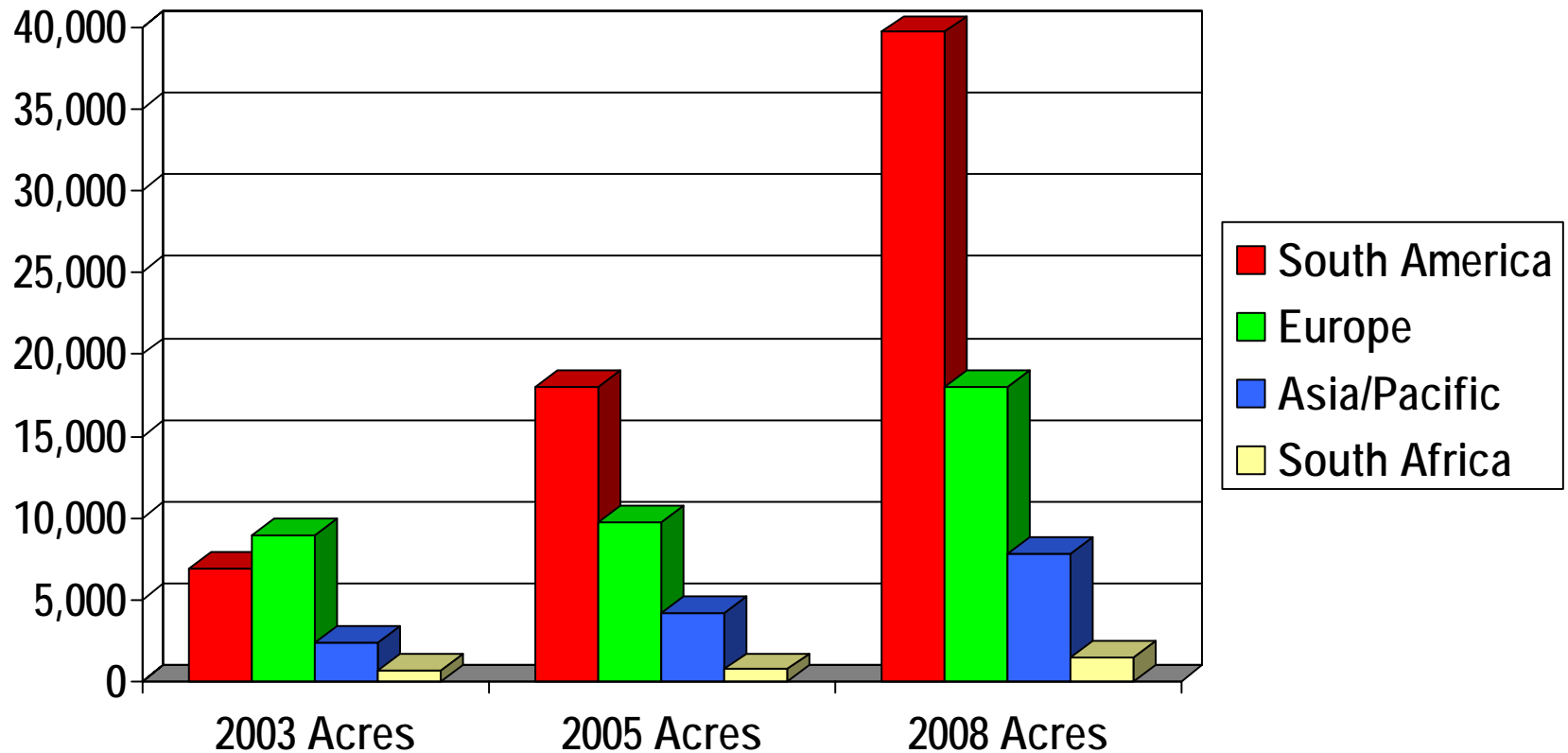
GROWTH IN WORLDWIDE Highbush BLUEBERRY ACREAGE

2003 to 2008

Total Acreage has Nearly Doubled from 83,299 Acres to Estimated 163,065 Acres
51% Increase in North America from 63,360 to 95,607 Acres
All Other Producers Up 356% from 18,939 to 67,458 Acres



OFFSHORE GROWTH IN HIGHBUSH BLUEBERRY ACREAGE 2003 to 2008

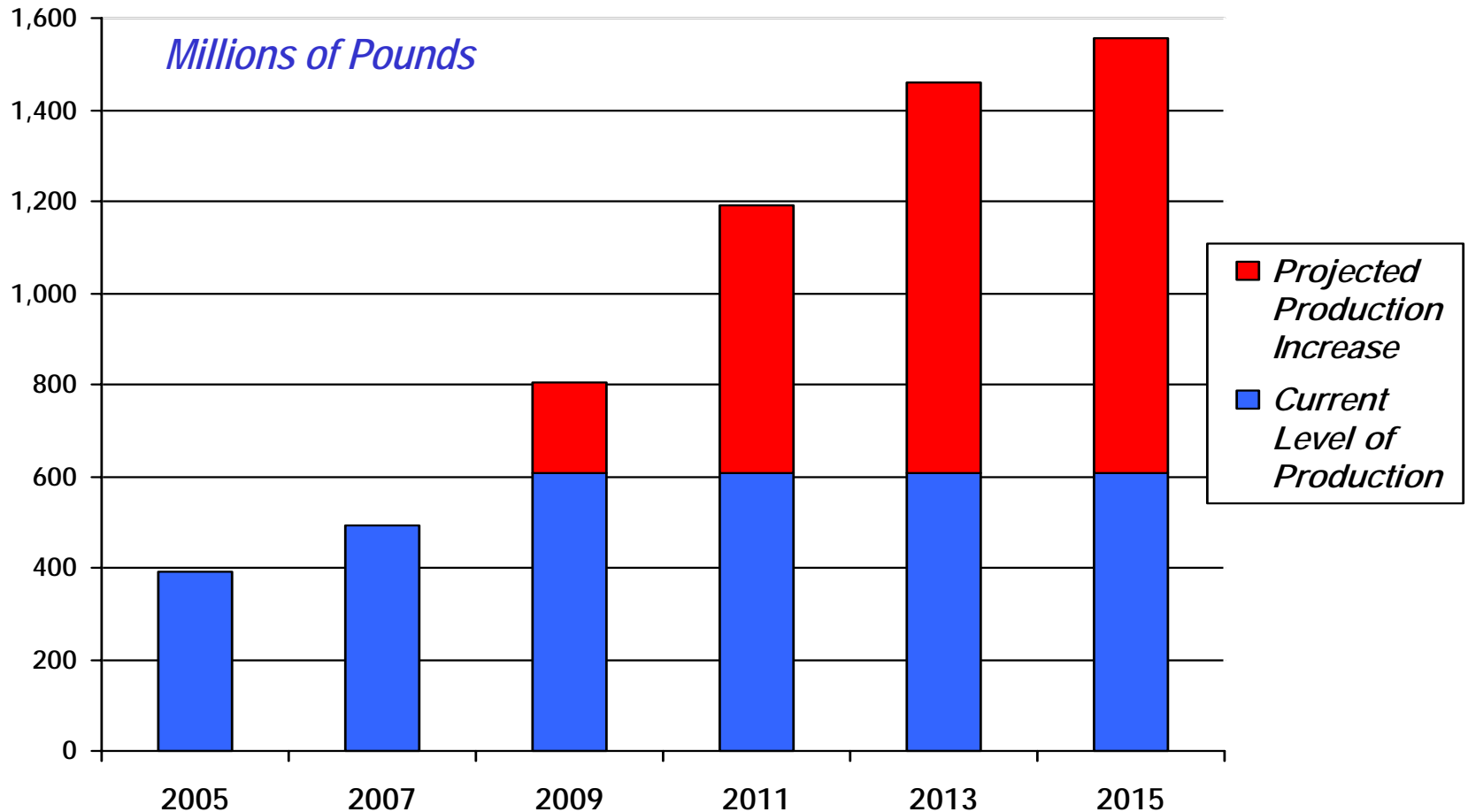


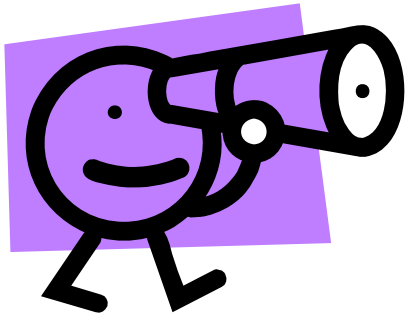
South American Acreage Increased by Over 32,000 Acres in Five Years (Primarily Chile and Argentina). Europe is up 9,000 Acres (Primarily Spain, Germany and Poland) and Asian Acreage has Increased by Over 5,000 Acres (Primarily China).

PROJECTED WORLDWIDE BLUEBERRY PRODUCTION

World Highbush Production Could Reach Over 1.5 Billion Pounds by 2015

North American Highbush Production Could Increase from 400 to Over 900 Million Pounds



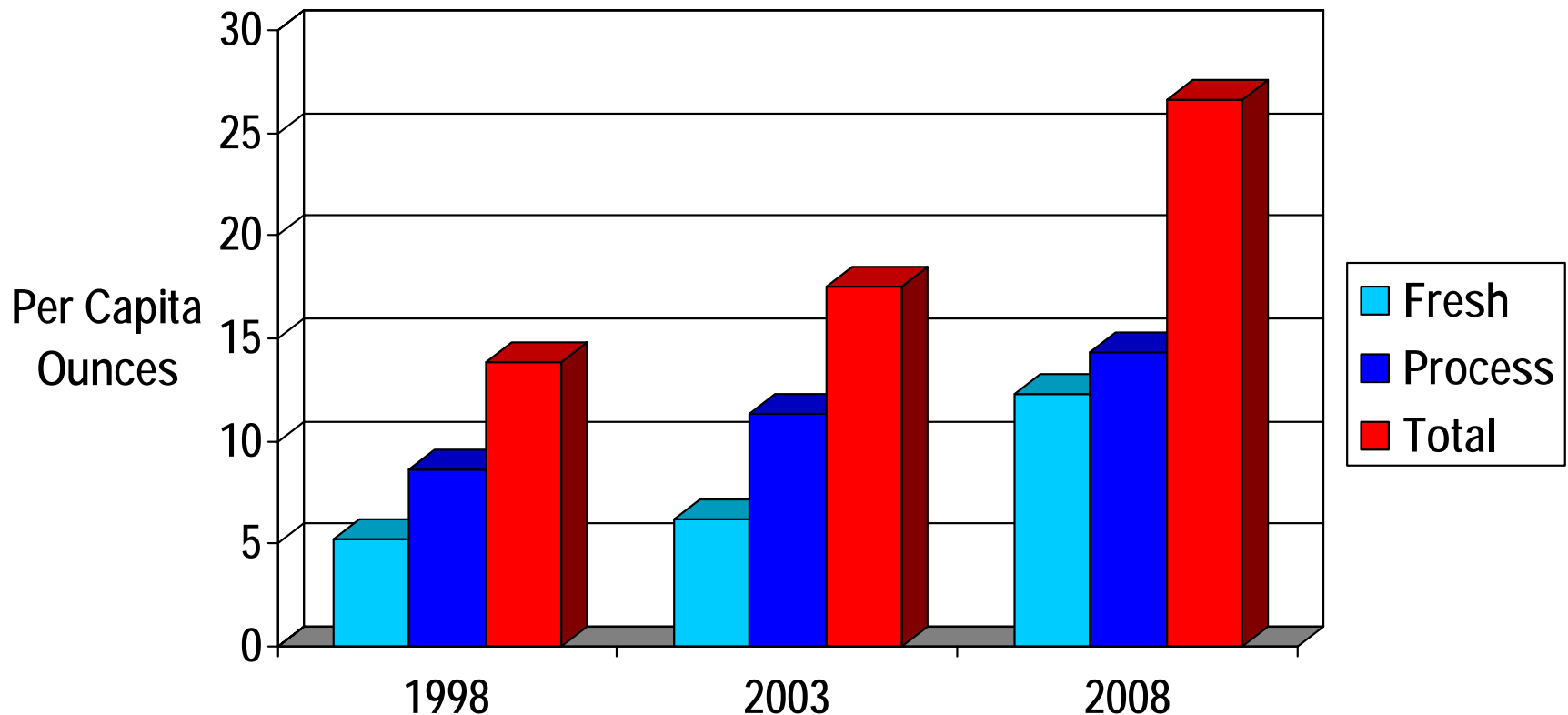


MARKET OPPORTUNITIES

- Blueberry Per Capita Consumption has Room to Grow
- Underdeveloped Domestic Markets
- Limited Volume Currently Allocated to Offshore Markets
- Blueberries Continue as Key Ingredient in New Product Development
- Blueberry “Health Halo” Remains a Purchase Driver

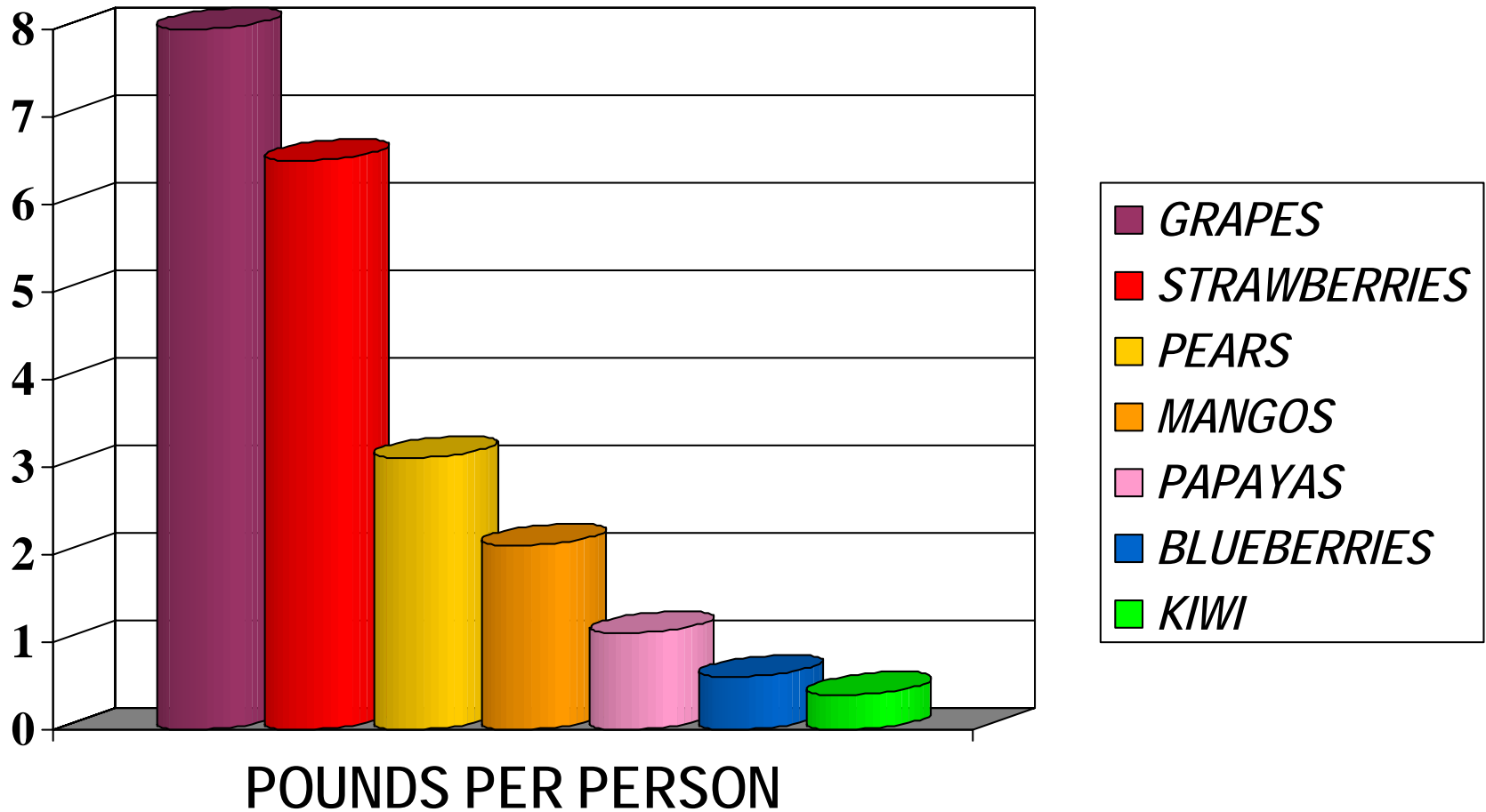
BLUEBERRY INTEREST REFLECTED IN U.S. PER CAPITA CONSUMPTION INCREASES

***Total Increase of +93% from 13.8 ounces in 1998 to an estimated 26.6 ounces in 2008
Fresh Consumption More Than Doubled (5.2 ounces to estimated 12.3 ounces)
Process Consumption Up +66% (8.6 ounces to estimated 14.3 ounces)***



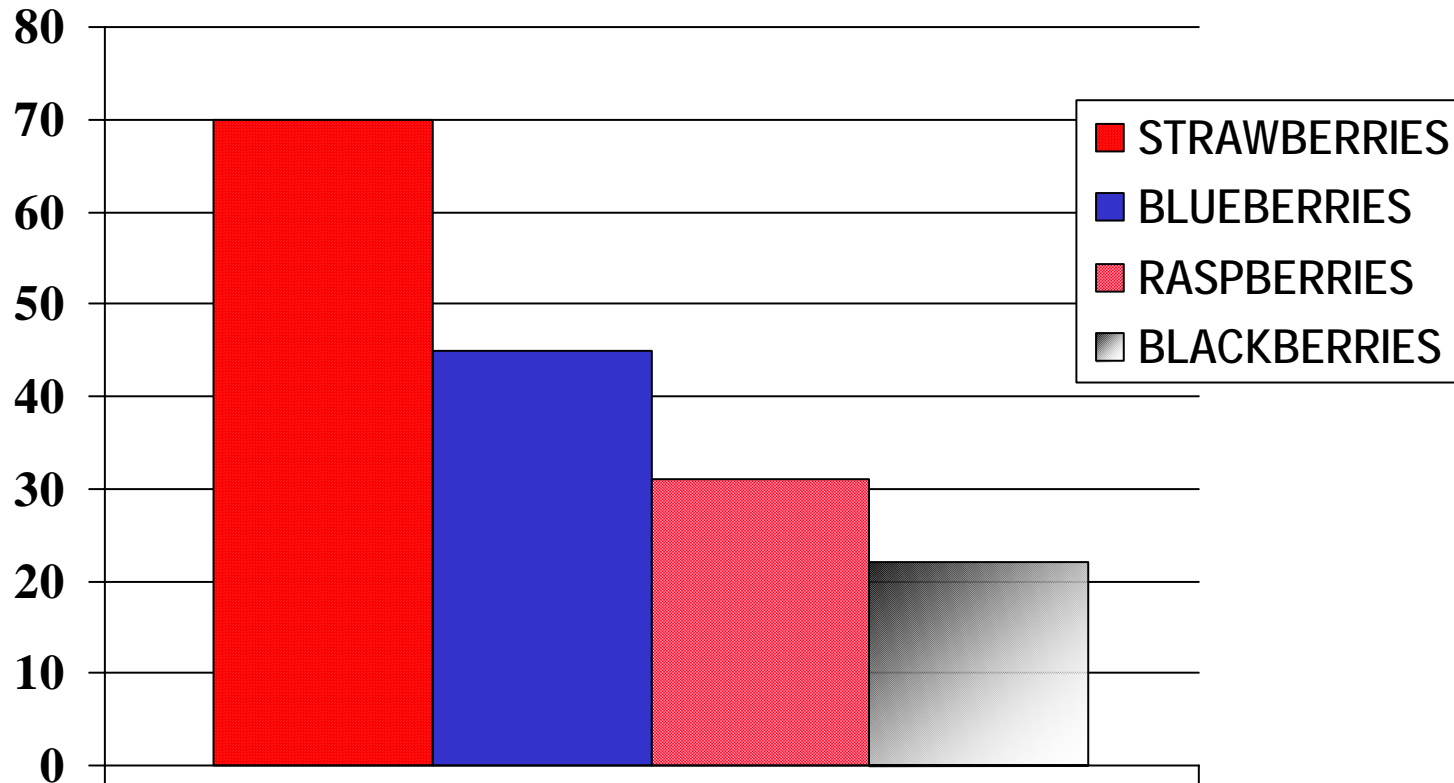
PER CAPITA CONSUMPTION OF VARIOUS TYPES OF FRESH FRUIT IN 2007

Source: USDA ERS- Fresh Fruit Farm Weight



PERCENT OF CONSUMERS PURCHASING BERRIES IN 2008

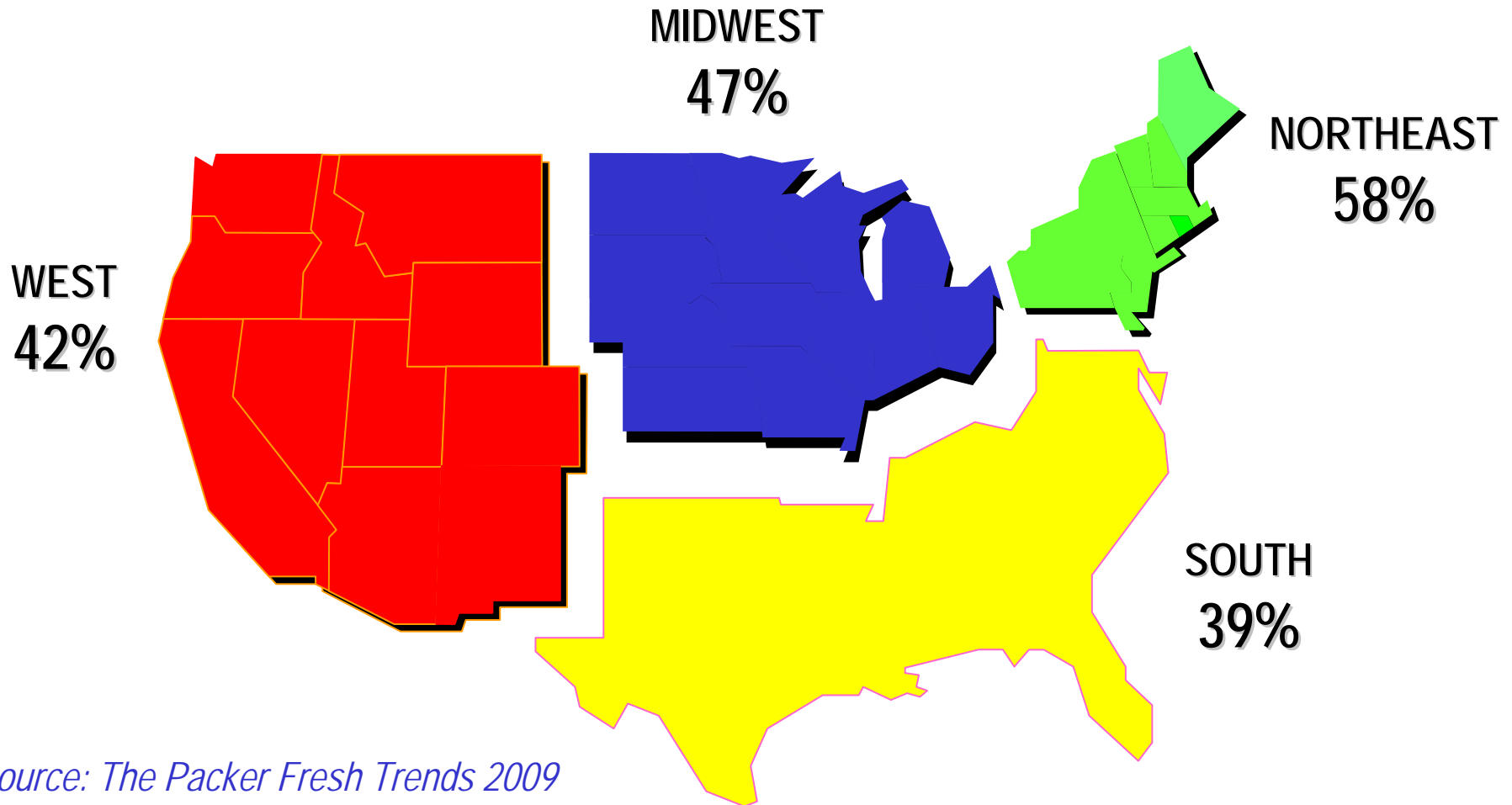
Source: The Packer Fresh Trends 2009



Percent Purchasing by Berry Type

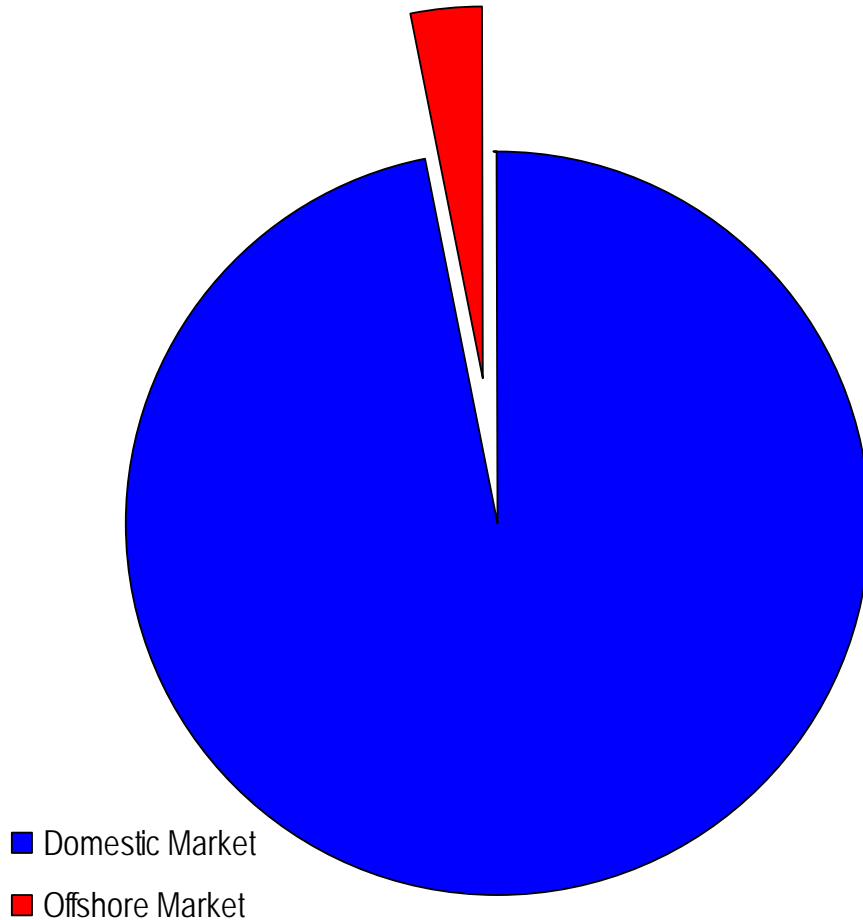
OPPORTUNITY TO EXPAND DOMESTIC MARKETS

PERCENTAGE OF CONSUMERS PURCHASING BLUEBERRIES IN 2008



Source: The Packer Fresh Trends 2009

OFFSHORE MARKET OFFERS POTENTIAL



Only 3% of U.S. Highbush Blueberry Crop Shipped Offshore in 2008
(10.2 million lbs. fresh and frozen)

Nearly Two out of Every Three Shipments Were to Japan (6.4 million lbs.) Followed by United Kingdom (1.4 million) and South Korea (0.9 million)

NEW PRODUCT DEVELOPMENT- A KEY TO INCREASED CONSUMPTION

- New Product Development Continues Upward Trend
- Over 1,400 New Blueberry Products Introduced in North America in 2008
- Top Categories: Non-Alcoholic Beverages
 - Dairy Products
 - Baked Goods
- Opportunity to Expand Blueberry Use Beyond Traditional Applications to Cosmetics and Pet Foods



Bountiful Blueberries

Frozen is Hot!

The supply of frozen blueberries has reached an all-time high. Good supplies assure availability and exceptional value. According to recent USHBC research, consumers recognize the health benefits of blueberry-containing products and want blueberries in every bite. Last year over 1,300 blueberry-containing products entered the market. This is the time to formulate with blueberries: formula-ready, flavorful, frozen blueberries.

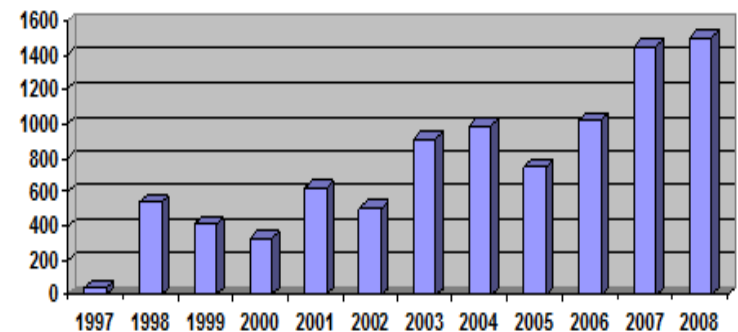


MADE WITH REAL BLUEBERRIES

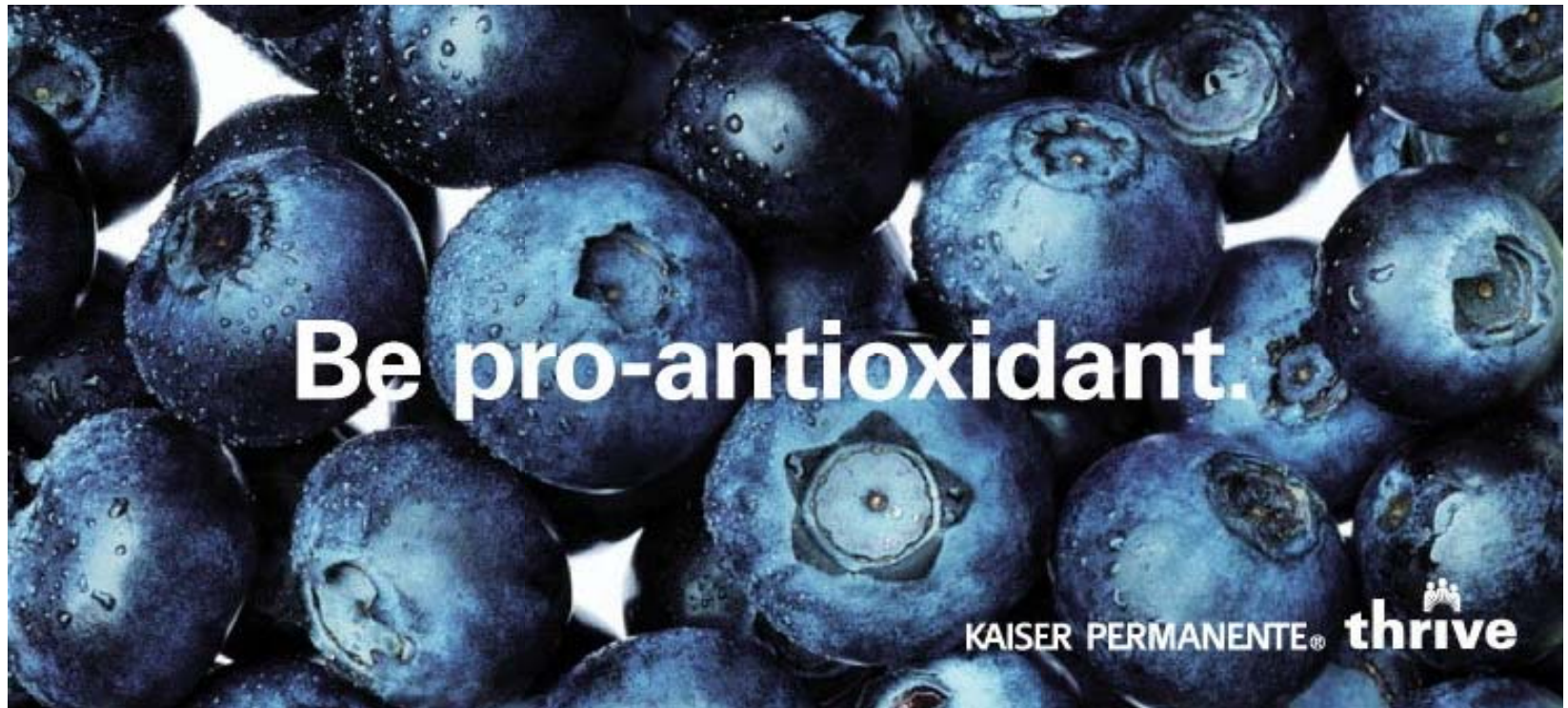
North America's growers thank you for supporting real blueberries.

US Highbush Blueberry Council
www.blueberry.org

New Blueberry Products/North America



***HEALTH RESEARCH
A MAJOR COMPONENT OF USHBC MARKET
PROMOTION PROGRAM***



Superfruits

Meet the Real Superberries

See why should try acai and goji

By [Rachel Meltzer](#), Rachel Meltzer is a *Prevention* magazine research editor.

New, exotic-sounding fruits with heavy-duty health claims seem to be everywhere---but the evidence backing these superfoods is often flimsy. Now research finds that acai and goji may live up to the superhero claims.

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Forget Superfruits: Eat a Plum

by [Chris Sparling](#)

Plums poised to give blueberries run for the money

By [Kathleen Phillips](#)
Texas AgriLife Extension Service

Super berries! New fruits like goji and acai pack a ton of nutrients

Pomegranate Juice Is Packed With Antioxidants

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It's time to start ordering pometinis at girls' night out (or making your own [pome-ritas](#) at home). A new University of California, Los Angeles, study ranked 10 beverages by their levels of disease-fighting antioxidants—and pomegranate juice came out on top. Here, the healthiest beverage powerhouses:

1. Pomegranate juice
2. Red wine

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The Cranberry Advantage

The whole fruit trumps juices and canned jellies—with more fiber and antioxidants

The Star: [Cranberries](#).

These festive, ruby-hued beauties beat out [coffee](#), [blueberries](#), and even red wine in a recent analysis of [antioxidants](#) reported in the *American Journal of Clinical Nutrition*.

USHBC RESEARCH PROJECTS



Age Related Diseases

(Parkinson's, Alzheimer's, Diabetes, Bone Density, Cancer)

USDA HNRCA- Boston

Loyola University-Chicago

Agri-Food Canada

National Institutes of Health

Johns Hopkins University

Oklahoma State University

Pennington Research Center

University of Cincinnati

City of Hope

Vision Studies

Dalhousie University/Agri-Food Canada

Louisiana State University

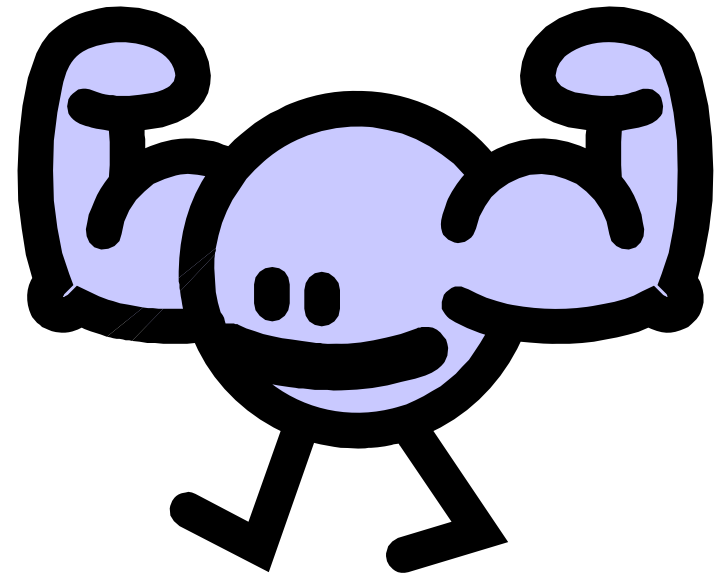
Food Safety

Michigan State University

Penn State University

Given Growth Projections Will Need to Significantly Increase Per Capita Consumption by Year 2015

Increase U.S. Per Capita Consumption by +65% from Estimated 26.6 Ounces in 2008 to 44.0 Ounces by 2015 to Keep Pace With Record Levels of Production



USHBC BLUEPRINT 2015

Building Demand to Meet Future Supply



- Expand Health Research and Move to Human Clinical Trials
- Reach Out to a Larger Audience, Explore New Markets and Uses
- Maintain Consumer Awareness of Blueberries and Health Given More Aggressive Claims By Other Fruit and Vegetable Groups
- Expand Current Promotional Activities and Broaden Audience Reach Through Advertising Programs
- Support Good Management and Food Safety Practices

Blueberries[™]

U.S. Highbush Blueberry Council

www.blueberry.org