

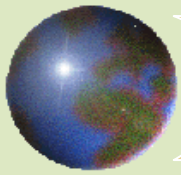
Small Fruit Berry Crops:

Production and marketing overview

Mark Gaskell, Ph.D.

University of California Cooperative Extension





Small fruit Berry Crops

- Blueberry
(*Les myrtilles*)



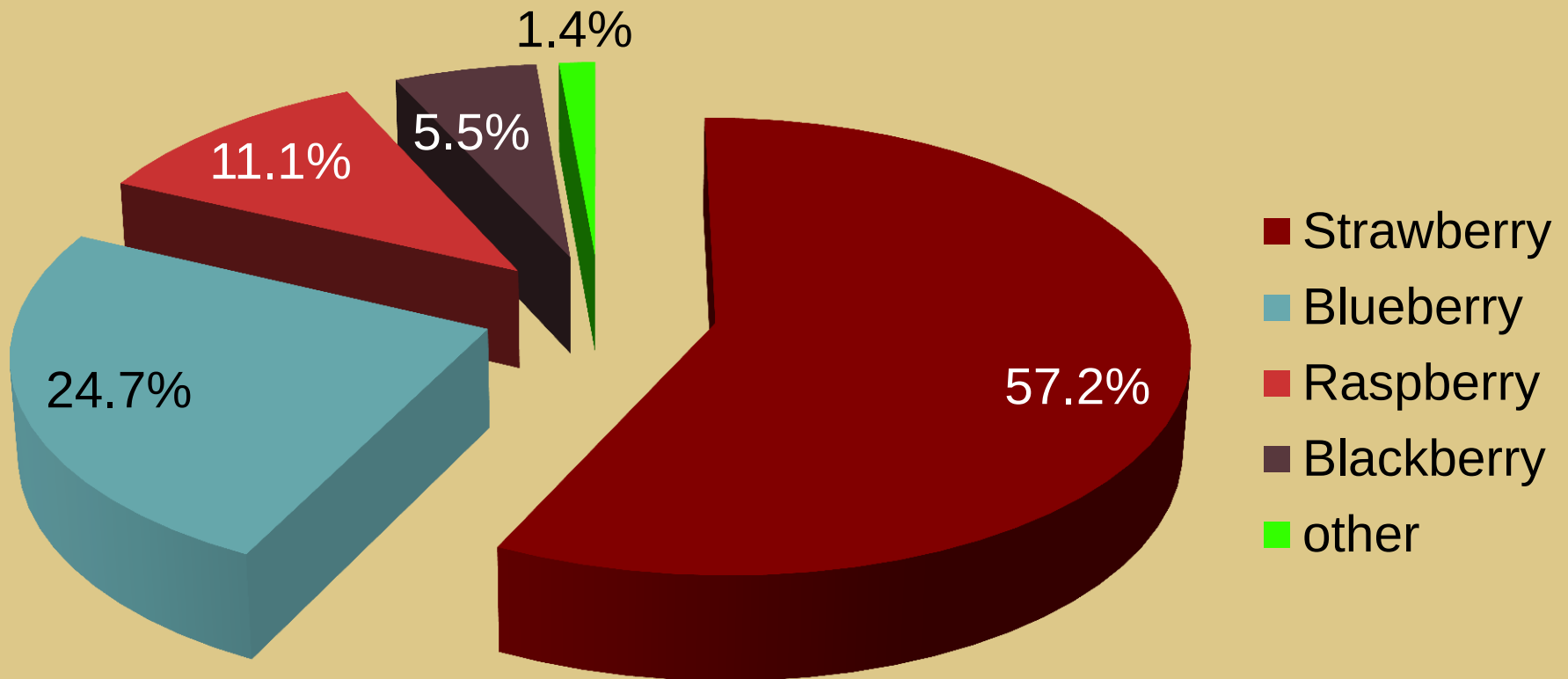
- Blackberry
(*Les mûres*)

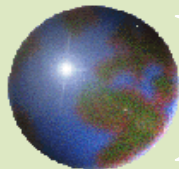


- Raspberry
(*Les framboises*)



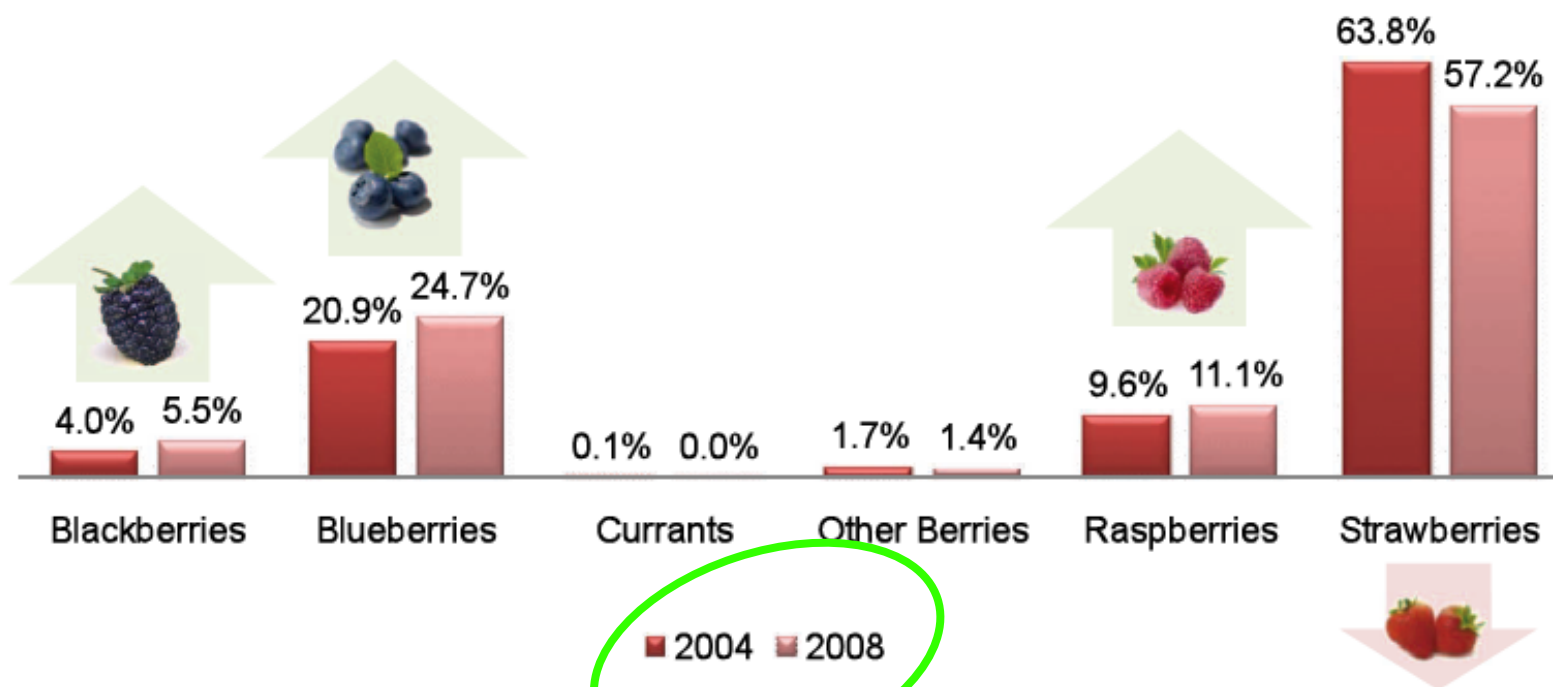
U.S. Sales of Small Fruits - 2008

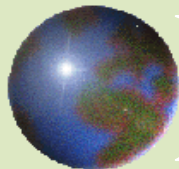




Consumer demand for small fruits - US

**Subcategory Contribution to Total Berries
2004 vs 2008**





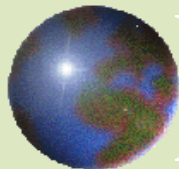
United Kingdom Small Fruit Market

2009

2010

(million pounds)

Strawberry	383.4 (61.5%)	394.1 (60%)
RASPBERRY	117.1 (18.8%)	124.2 (18.7%)
BLUEBERRY	96.4 (15.5%)	117.6 (17.7%)
BLACKBERRY	25.9 (4.1%)	25.9 (3.9%)
TOTALS	622.8	661.8



United Kingdom Small Fruit Market

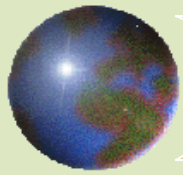
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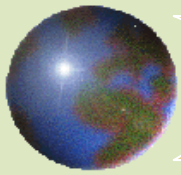
January 2012 UK supermarket chains reporting weekly sales for blackberrries up 98% and blueberries up 16% over same time prior year



Small fruit berry crops

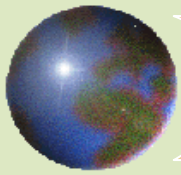
- *Small perennial shrubs or vines*





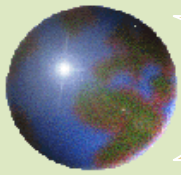
Small fruit berry crops

- *Small perennial shrubs or vines.*
- *Share many production and marketing characteristics with strawberry.*
- *Raspberries, blueberries, and blackberries increasing importance over past 10-15 years.*
- *Historically cultivated in temperate cold areas.*
 - > now also into subtropical areas of US, Spain, Morocco and highland tropics in Mexico and Central America*



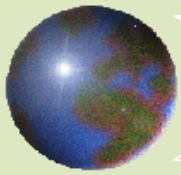
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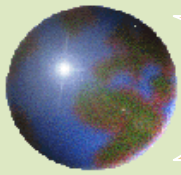


Opportunities for small fruit crops

- *Out of season production > October to May / June
> investigate other mid season markets?*

Create jobs in rural areas – high labor requirement.

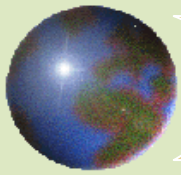
Well adapted to many mild, coastal areas for off-season production



Opportunities for berry crops

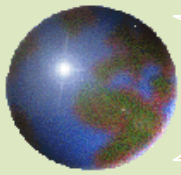
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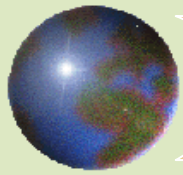
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Fresh market or processing?

- *Best opportunities are for fresh market emphasis.
> best utilizes geographic, climate advantages*
- *Use processing market for volume of product that cannot be marketed fresh.*

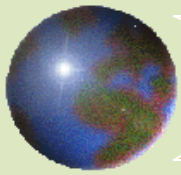




Small fruit berry crops – need for research

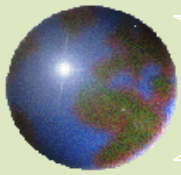
- *New varieties constantly with improved productivity and quality.
 - > need to be evaluated in specific environments especially with regard to the market*
- *Need for continuing research on variety development, cultural practices, pests / disease management.*
- *Use of field tunnels improves yield / quality during off season.
 - > not always justified*





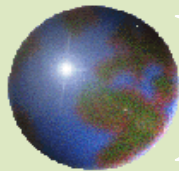
Opportunities for berry crops

- *Other small fruit crops can also utilize infrastructure and experience from existing strawberry industry.*
- *Important for employment and rural economies.*
- *Especially important for unemployed women.*
- *Additional options:*
 - *summer and autumn exports,*
 - *domestic sales, tourism*
 - *organic (biologique) production*



Opportunities for berry crops

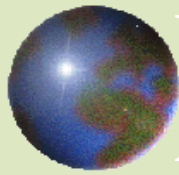
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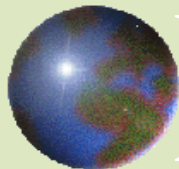




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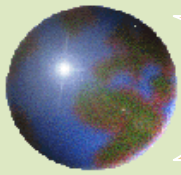




Organic Berry Production

- *Growing demand in EU and concentrated effort among EU supermarkets*
 - > more specialized market with premium prices*
- *Higher costs of production and more demanding management*
 - > specialized skills and special research needs*
- *Important to have close connection with production and specialized post harvest handling and marketing.*



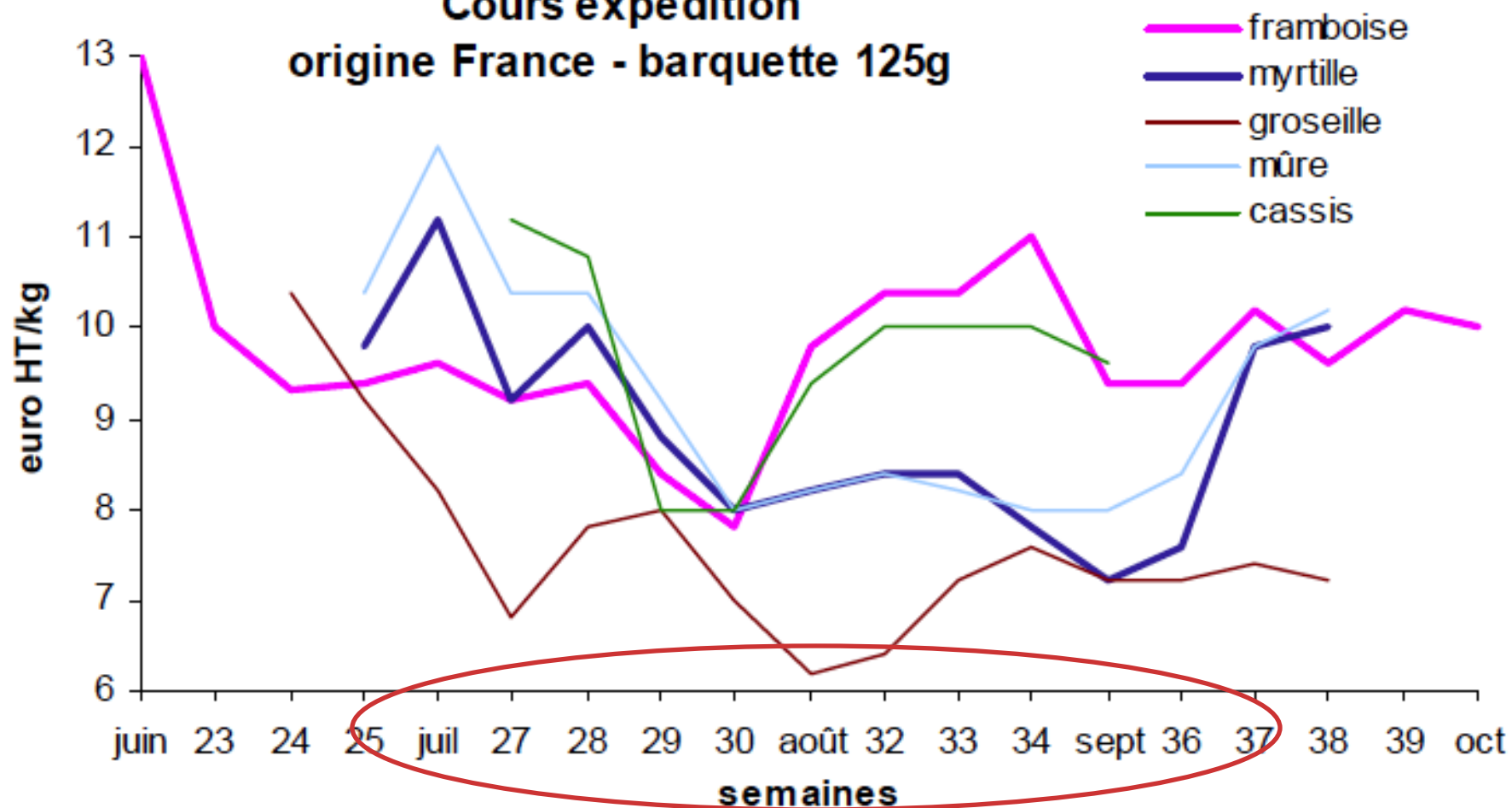


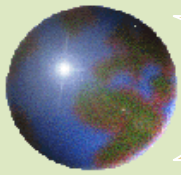
Current market sources for small fruits

- *Growing market in EU supplied by Chile, Argentina, Mexico, South Africa, Spain + recently Morocco.*
- *Popular fruits in many areas of Europe where production limited to June and July.*
- *Mild climates and established market channels offer many advantages for Portugal.*

2010 France – wholesale price in domestic market

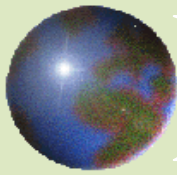
Cours expédition origine France - barquette 125g





Blueberry situation





Blueberry nutraceutical value

BLUEBERRIES A Handful of Health

Plump, juicy, and sweet, with vibrant colors ranging from deep purple-blue to blue-black and highlighted by a silvery sheen called a bloom, blueberries are one of nature's great treasures. Though miniature in size, they are also proof that, when it comes to health benefits, good things really do come in small packages.



BLUEBERRIES ARE...

LOW IN FAT.

A one-cup serving contains only **80 calories** and virtually no fat.

FULL OF PHYTONUTRIENTS.

Research suggests that the phytonutrients in blueberries, called polyphenols, have antioxidant and anti-inflammatory properties that may help lessen the inflammatory process associated with chronic conditions such as cardiovascular disease, cancer, and other age-related diseases.^{5,6,7}

FULL OF DIETARY FIBER.

A handful of blueberries helps satisfy recommended daily fiber intake.²

Fiber helps keep the body regular, the heart healthy, and cholesterol in check.³

PACKED WITH VITAMIN C.

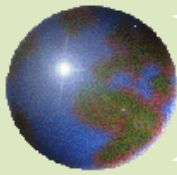
One serving delivers almost **25%** of one's daily requirement of vitamin C.²

Vitamin C aids collagen formation and helps maintain healthy gums and capillaries and a healthy immune system.³

AN EXCELLENT SOURCE OF MANGANESE.

Manganese plays an important role in bone development and in converting proteins, carbohydrates, and fats into energy.⁴





NORTH AMERICAN BLUEBERRY CONSUMPTION

With blueberry production increasing to match rising levels of consumption, it's clear that more Americans are discovering just how good these Little Blue Dynamos are!

Total

283
million lbs.

349
million lbs.

414
million lbs.

749
million lbs.

853
million lbs.

1995

2000

2005

2010

2011

15.5 oz.

17.8 oz.

20.2 oz.

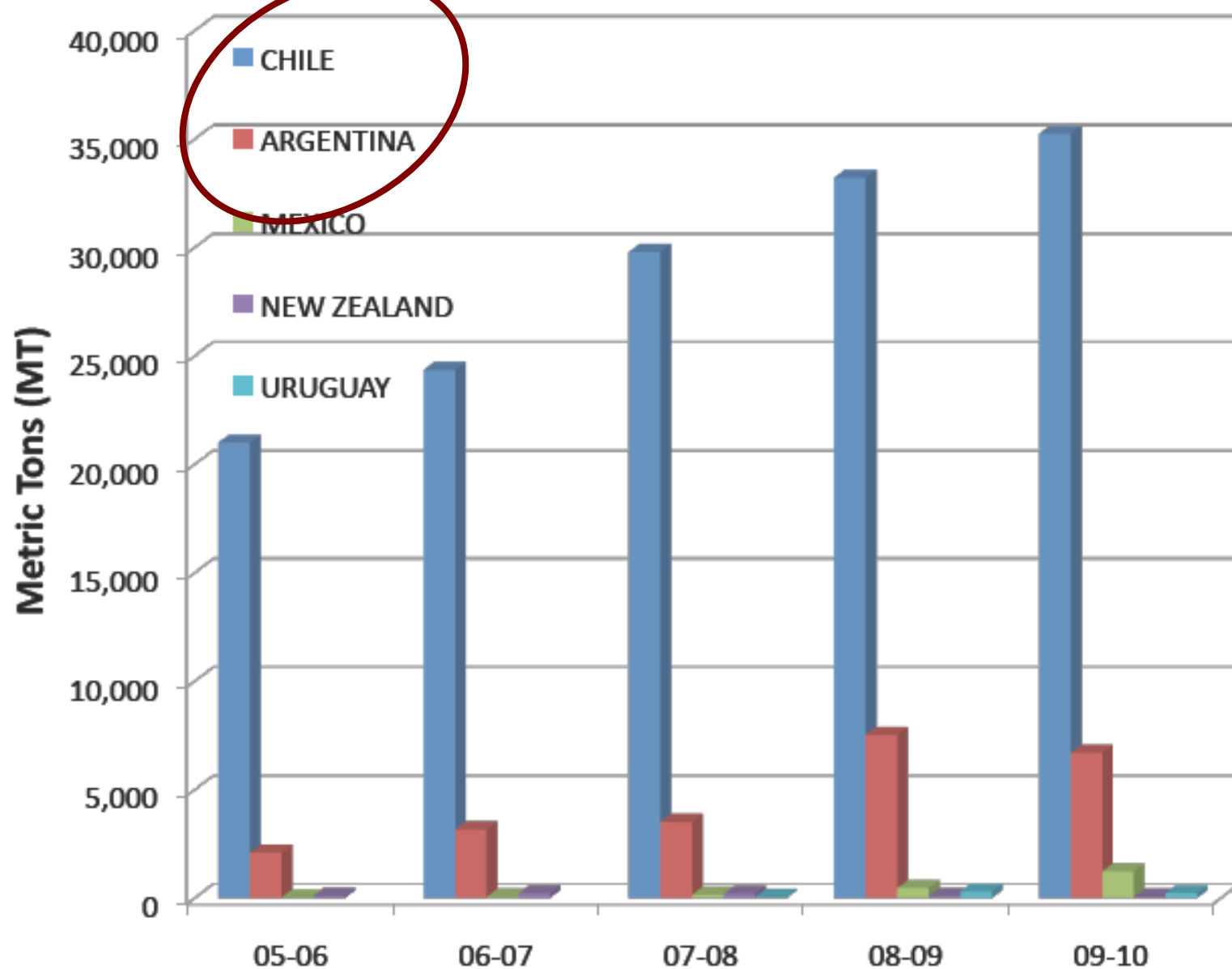
34.9 oz.

39.5 oz.

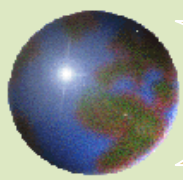
Per Capita



U.S. COUNTERSEASONAL FRESH BLUEBERRY IMPORTS

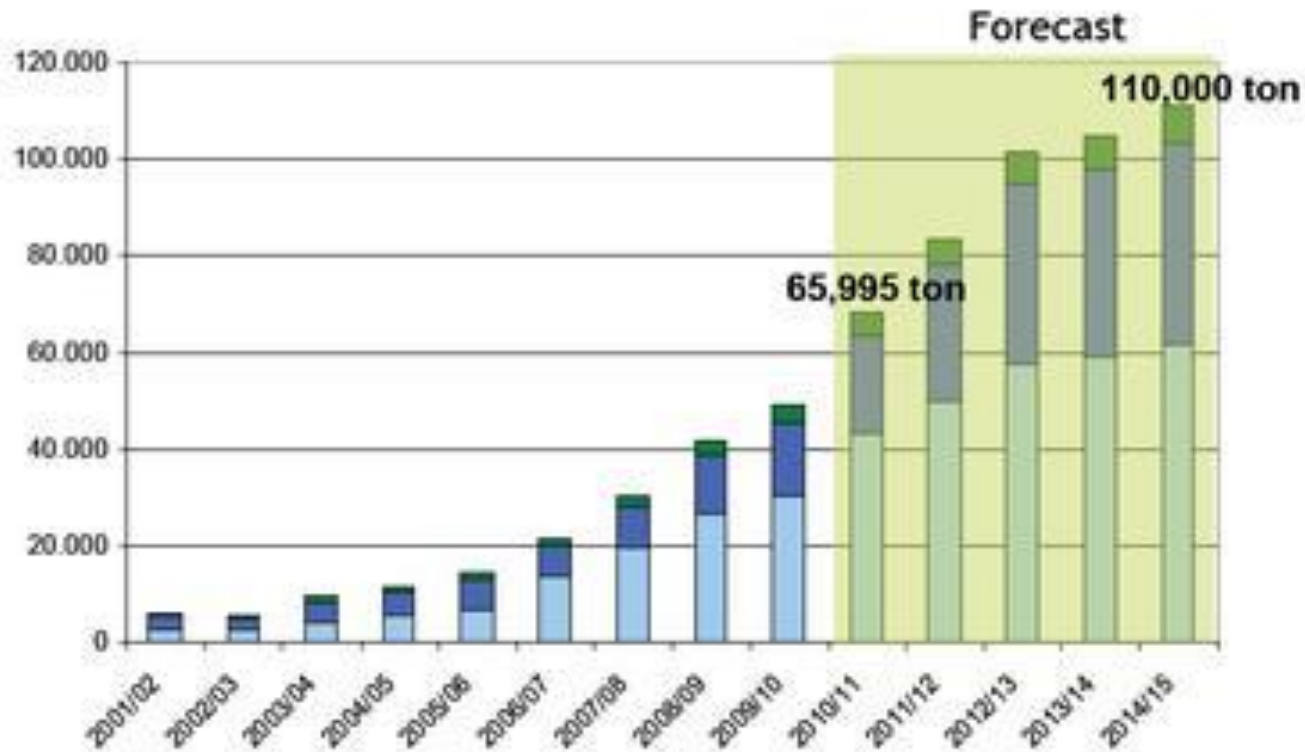


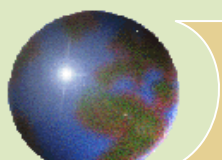
Source: Honigberg (Sunbelle Mktg) GBC Monterey, CA 2011



Blueberry production and export - Chile

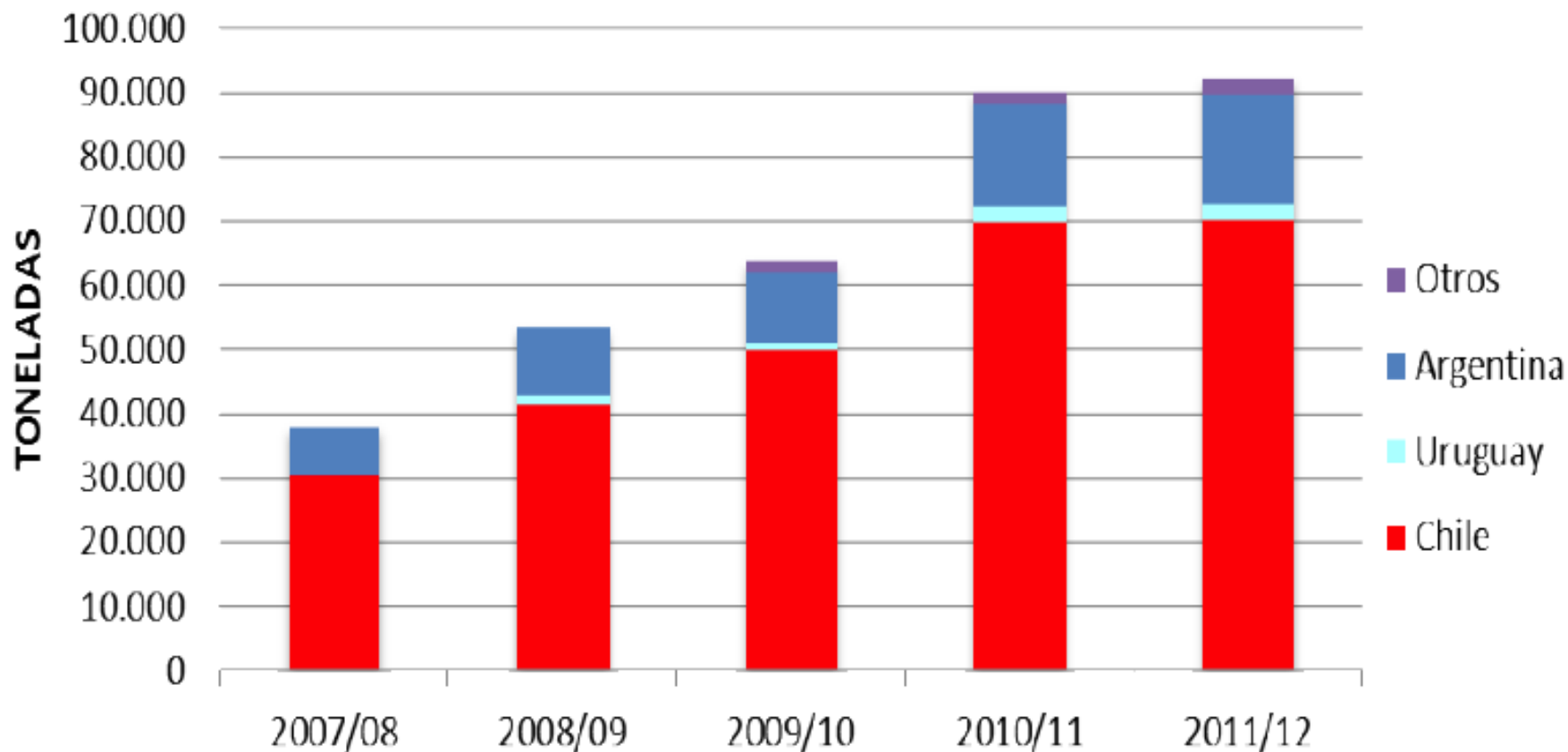
Export Forecast



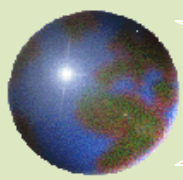


Blueberry production and export - Chile

ARÁNDANO DEL HEMISFERIO SUR: EXPORTACIÓN TOTAL EN TONELADAS

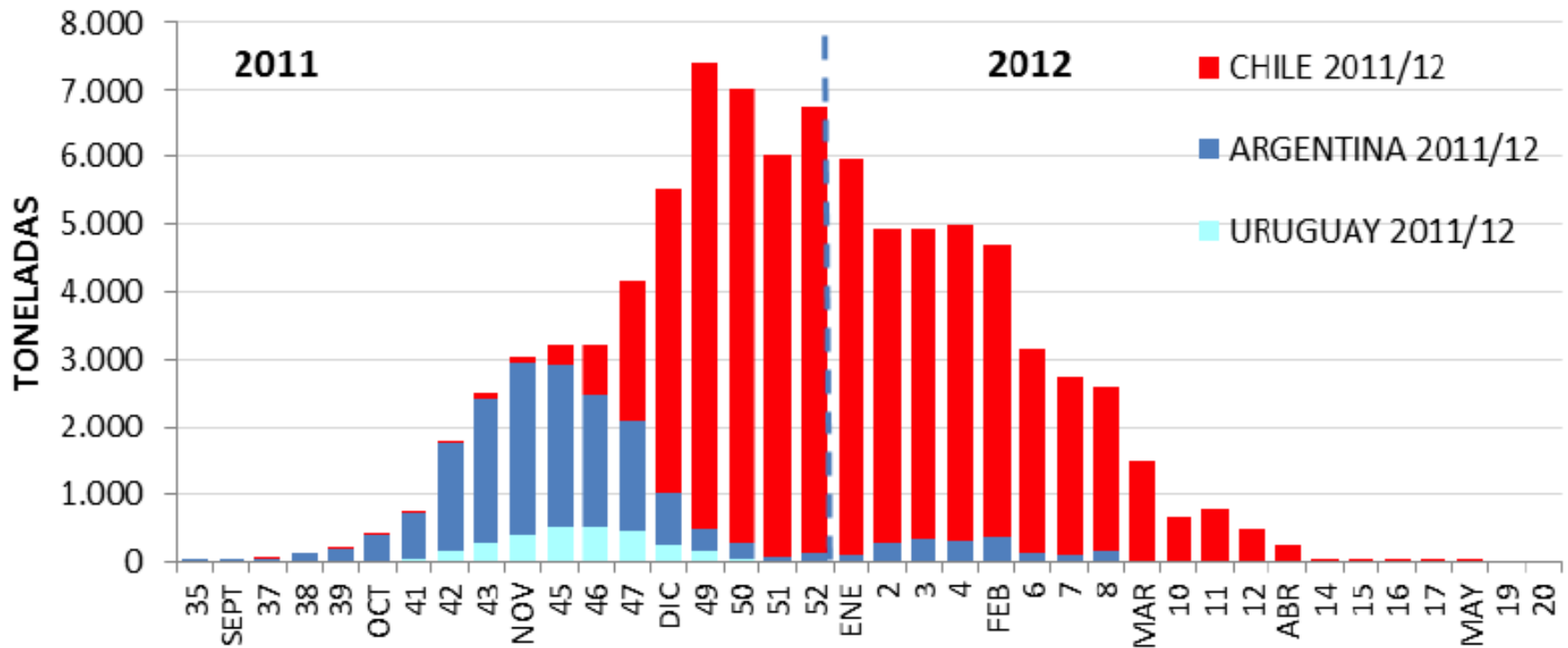


Fuente: MAG / SAG - ASOEX / iQonsulting.

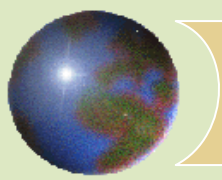


Blueberry production and export – South America

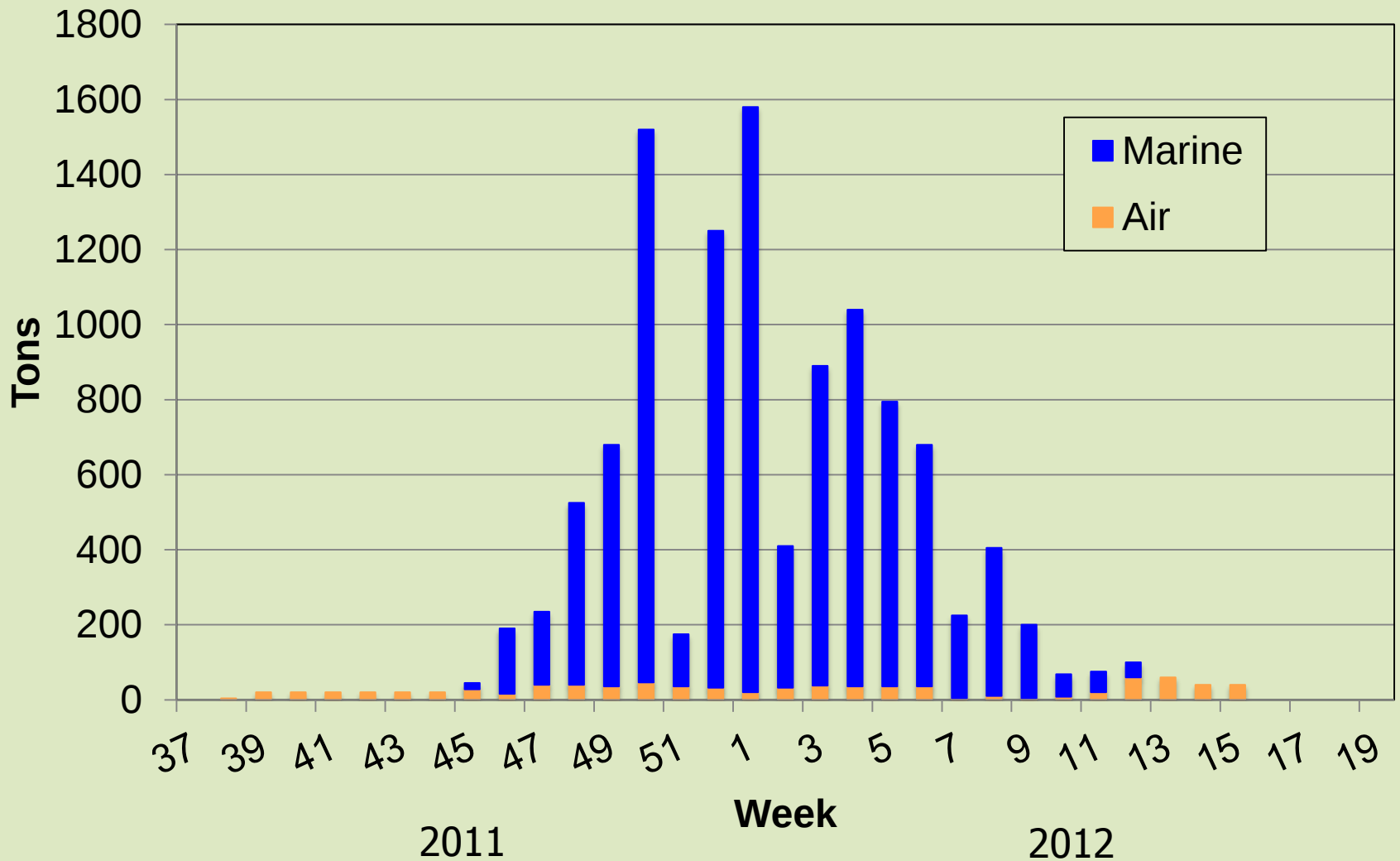
ARÁNDANO DE SUDAMÉRICA: DISTRIBUCIÓN DEL VOLUMEN DE EXPORTACIÓN
SEMANAL POR PROVEEDOR.
TEMPORADA 2011/2012



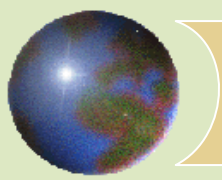
Fuente: SAG - ASOEX / MAG / iQonsulting.



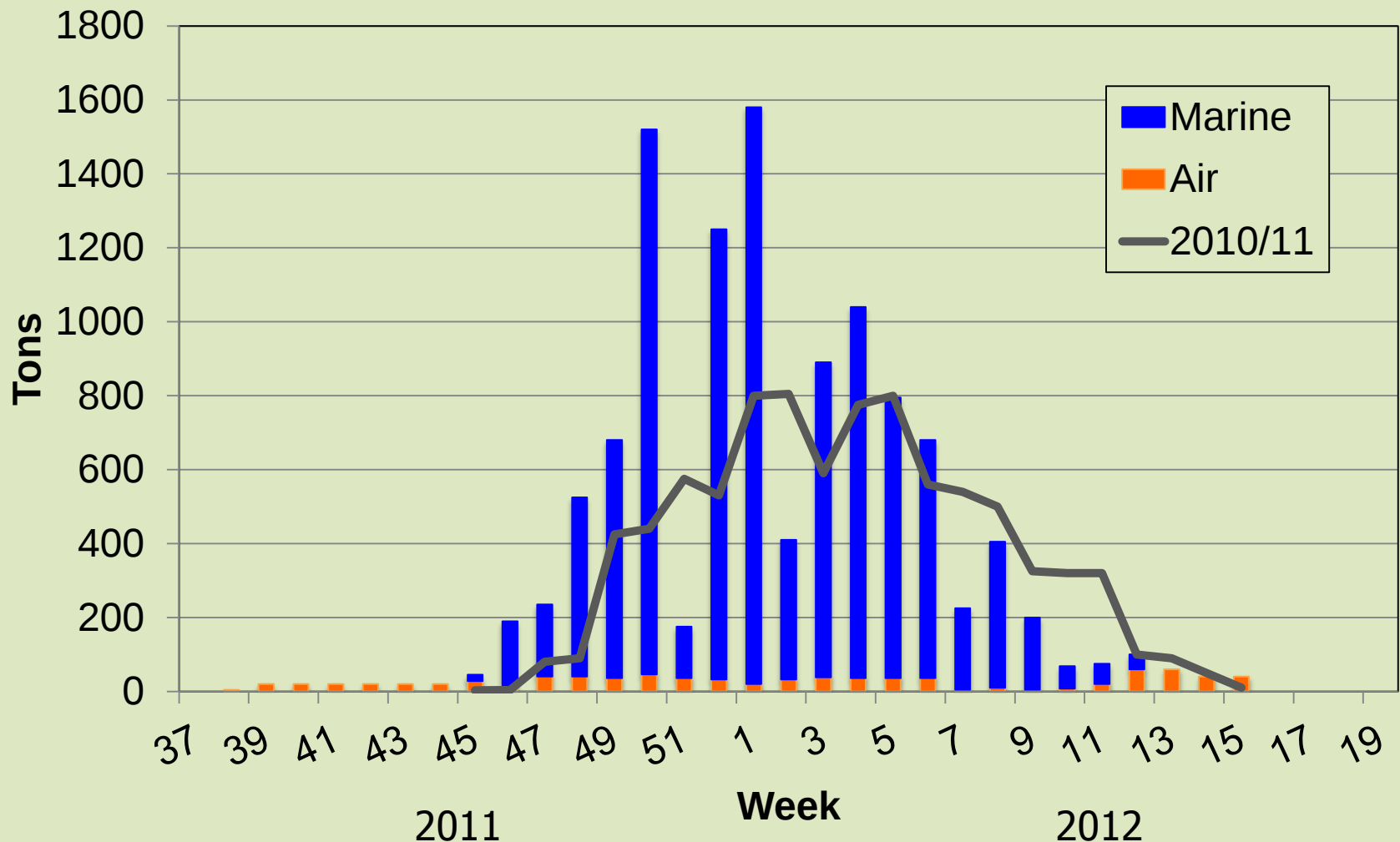
Weekly EU market Chilean blueberry shipping volume by mode of transport – 2011 / 2012 season



Source: ARANDANOS - MERCADO INTERNACIONAL Y EXPECTATIVAS PARA LA OFERTA DE CHILE, Quiros Consulting

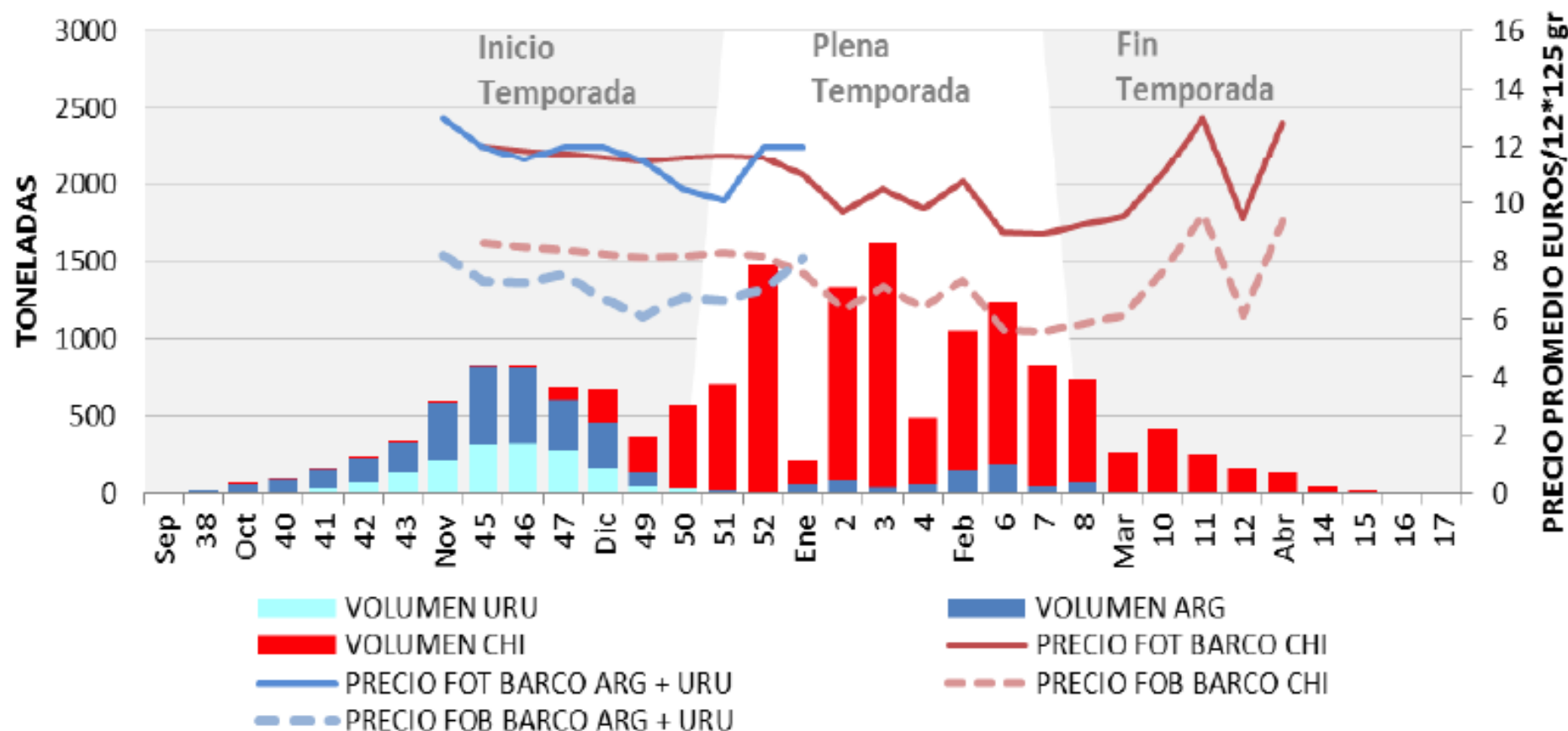


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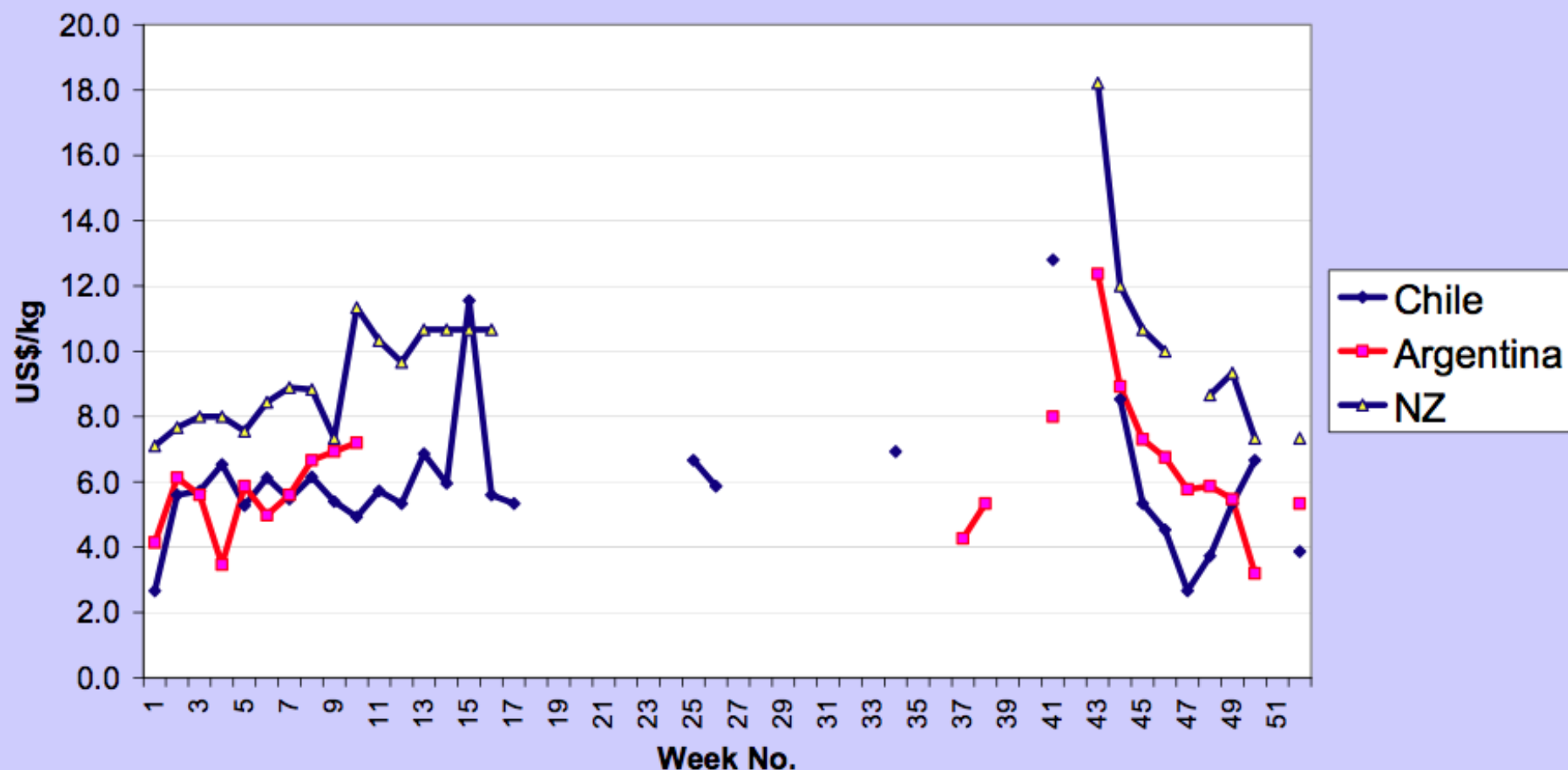
ARÁNDANO SUDAMÉRICA: ARRIBOS SEMANALES Y PRECIO FOT Y FOB AL MERCADO DE EUROPA TEMPORADA 2011/12



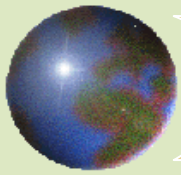
Fuente: MAG / SAG / ASOEX / iQonsulting.

TEMPORADA	EE.UU.	CANADA	EUROPA	LEJANO ORIENTE	MEDIO ORIENTE	LATINOAMERICA	TOTAL
2009/10	40.807	409	7.124	1.481	66	3	49.890
2010/11	58.592	683	8.620	1.945	16	66	69.922
2011/12	54.862	816	11.363	2.884	98	79	70.102
% VAR	-6%	19%	32%	48%	513%	20%	0,3%

**Figure 34 Blueberries wholesale prices at New Covent
Garden market (2005-2009) - United Kingdom**



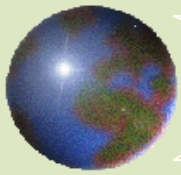
source: "Assessment of Moroccan Berries Exports (An Export Market Analysis), Moroccan Integrated Agriculture and Agribusiness Program, United States Agency for International Development, Rabat. 2010.



Off-season blueberry summary

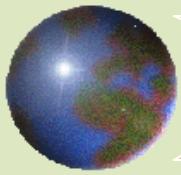
- *Argentina and Chile ship ~ 20,000 tonnes to EU.*
- *Moroccan blueberry acreage increasing + 500 ha planted or planned*
 - *1000 ha within a decade*





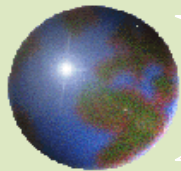
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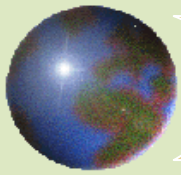
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Raspberry situation



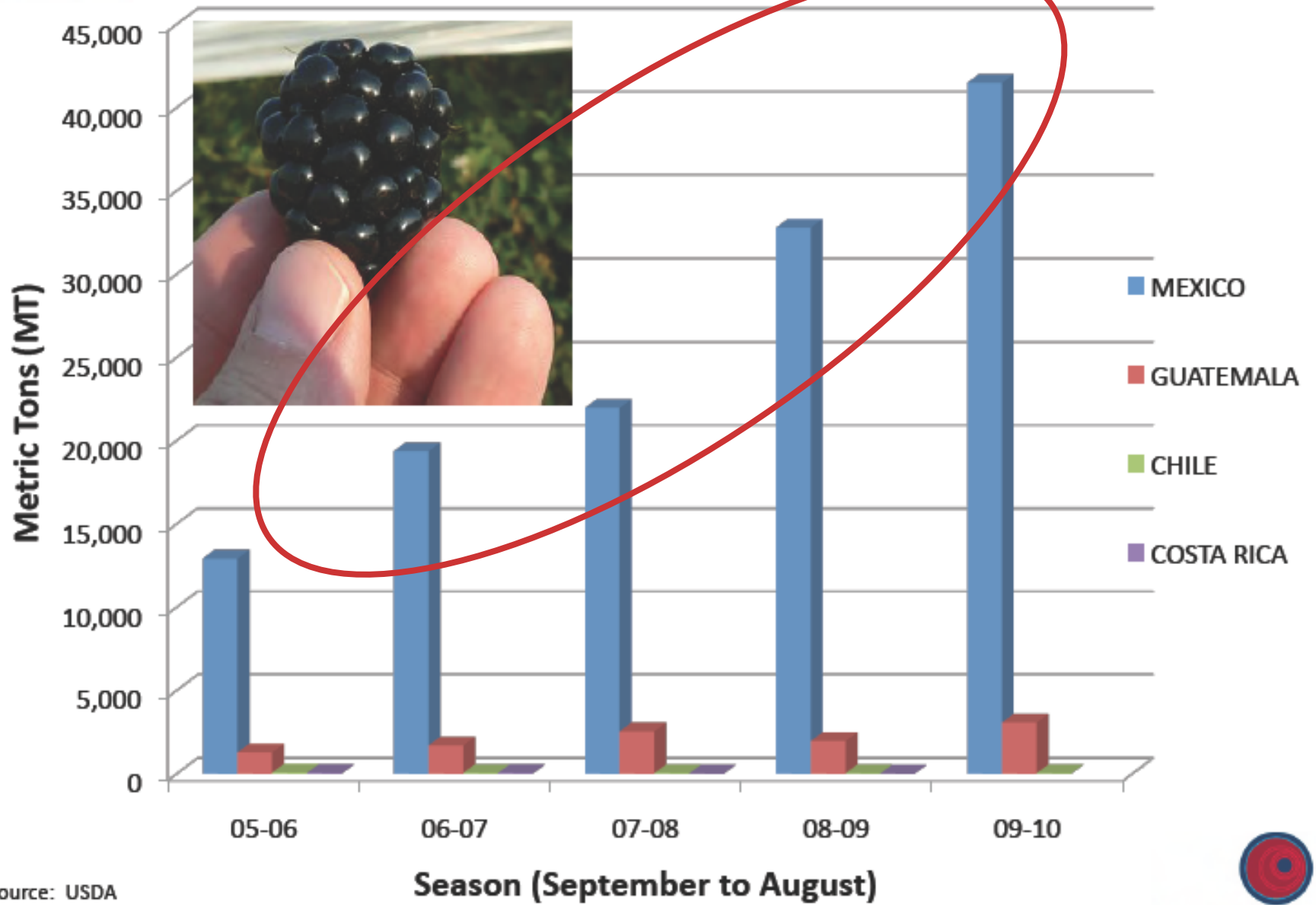


Blackberry situation





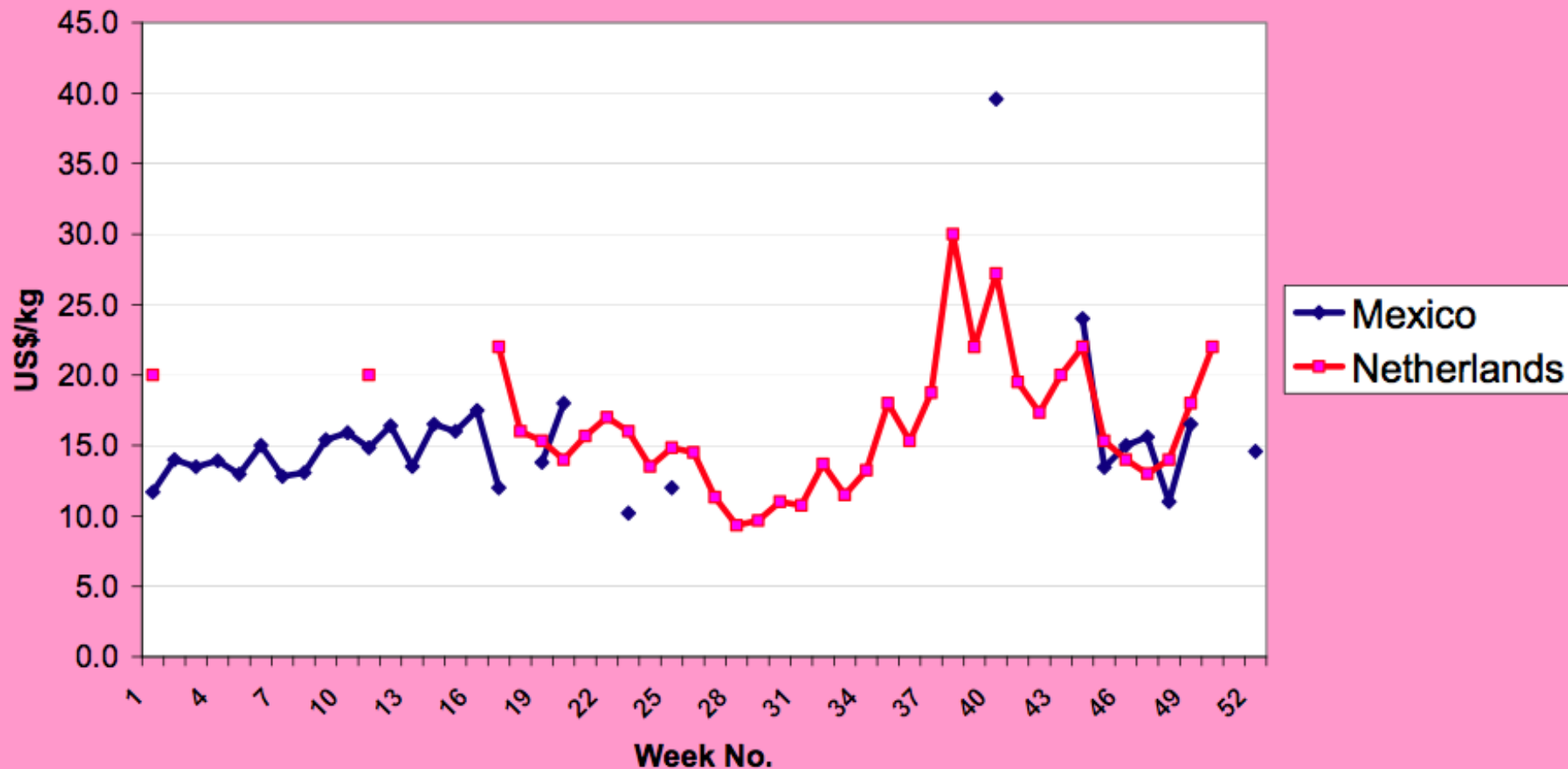
U.S. FRESH BLACKBERRY IMPORTS



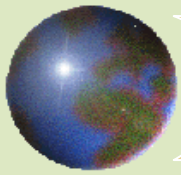
Source: USDA

Source: Honigberg (Sunbelle Mktg) GBC Monterey, CA 2011

**Figure 32 Blackberries wholesale prices at New Covent
Garden market (2005-2008) - United Kingdom**



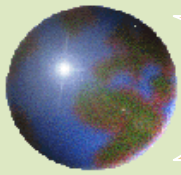
Source: "Assessment of Moroccan Berries Exports (An Export Market Analysis), Moroccan Integrated Agriculture and Agribusiness Program, United States Agency for International Development, Rabat. 2010.



Blackberry production in Mexico

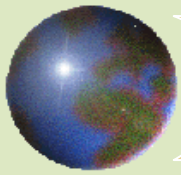
- *Considerable effort in recent years in improving production and management and breeding new varieties.*
- *10,000 ha of blackberries in MX and
> expect to double in next 10 yrs.*
- >>> now 80,000 workers involved in berry production and marketing in Mexico.*





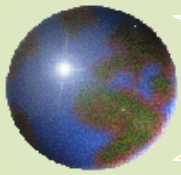
Off-season blackberry summary

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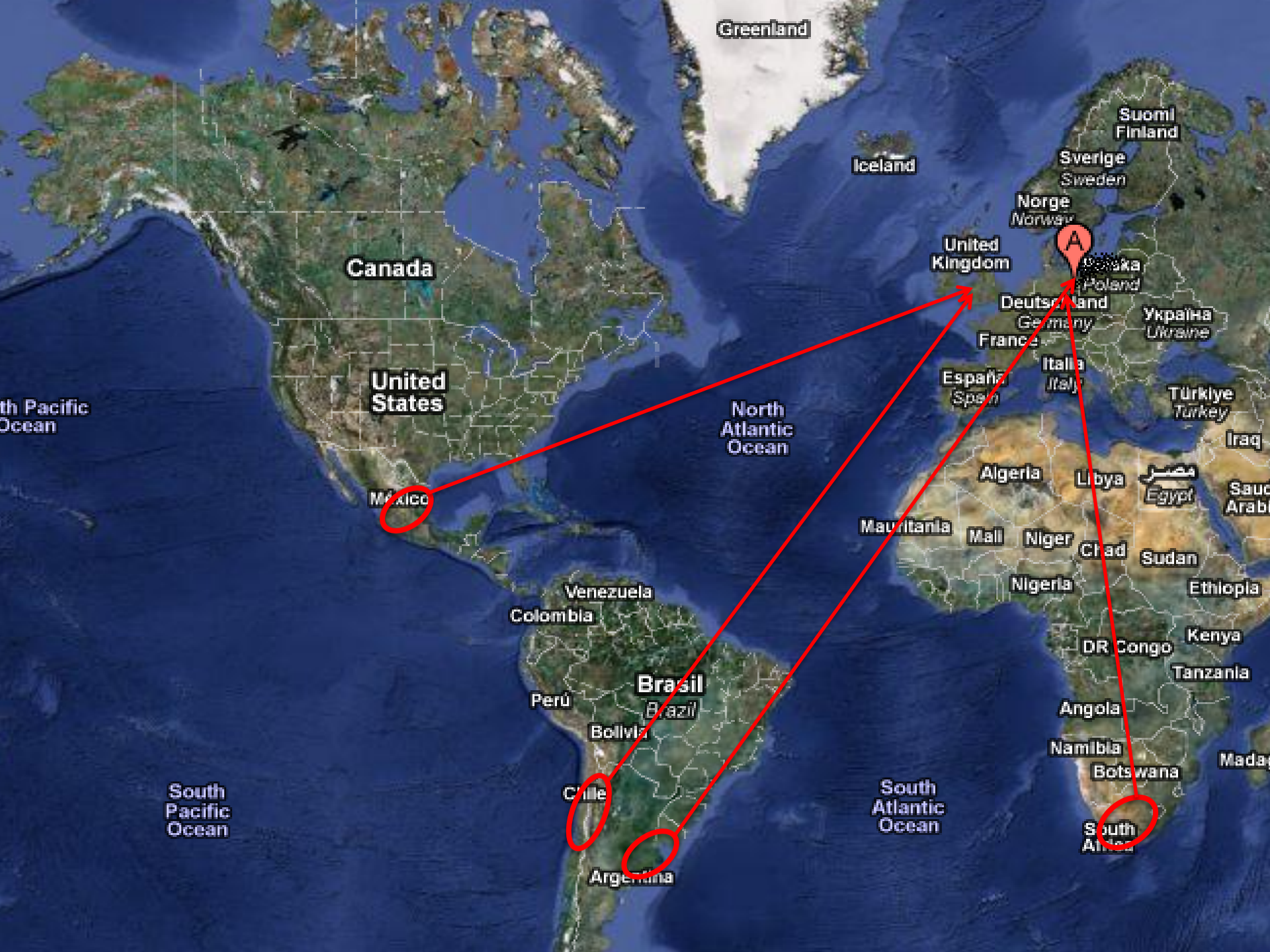
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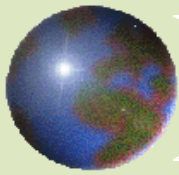
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Overall, Chile and Argentina
blueberry to EU = 15,000 > 20,000
tonnes at
8 Euro / kg

= ~ 160 Million Euros for Blueberries
to EU

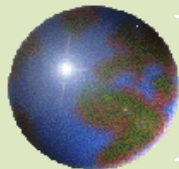


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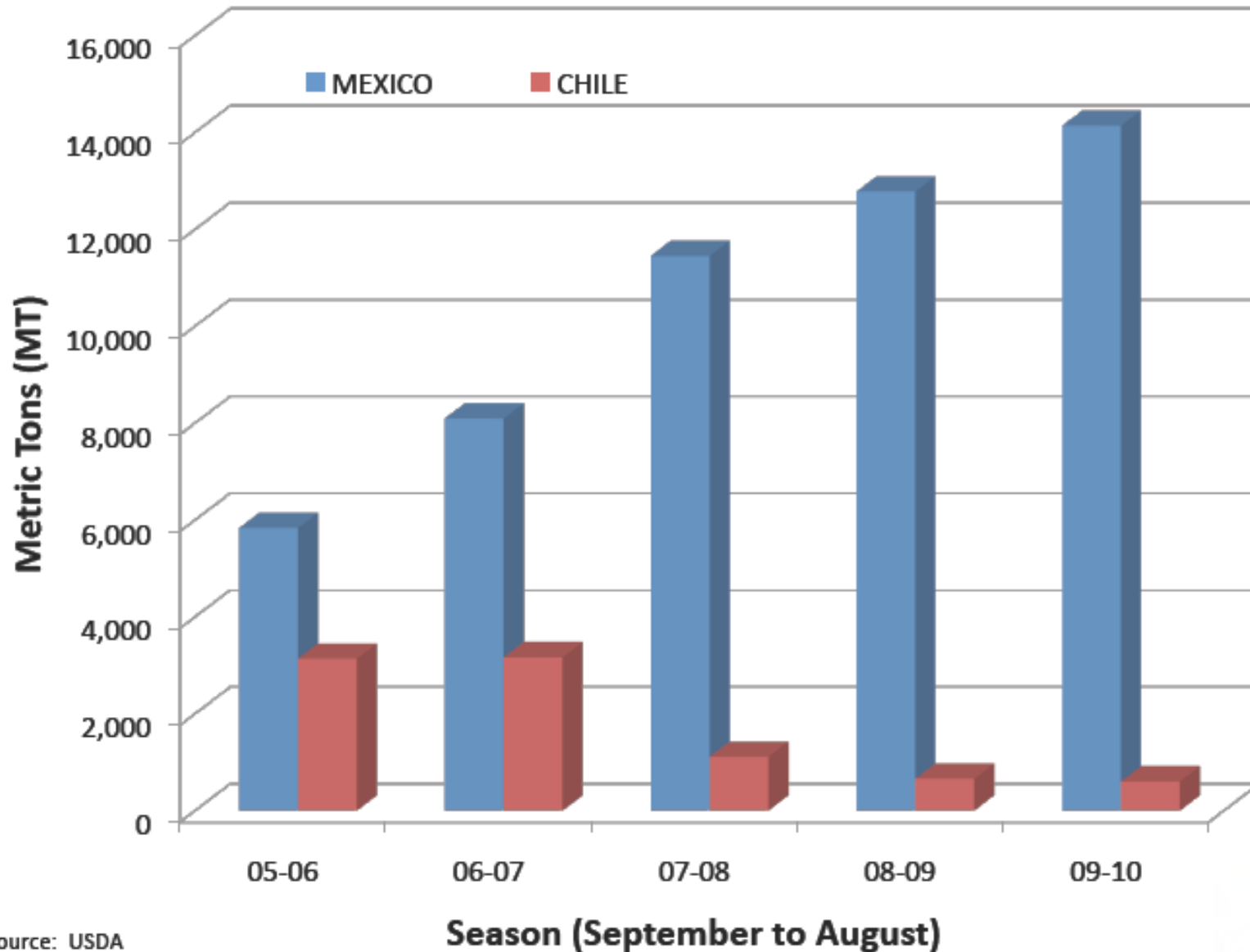
Mark Gaskell, Ph.D.

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U.S. FRESH RASPBERRY IMPORTS



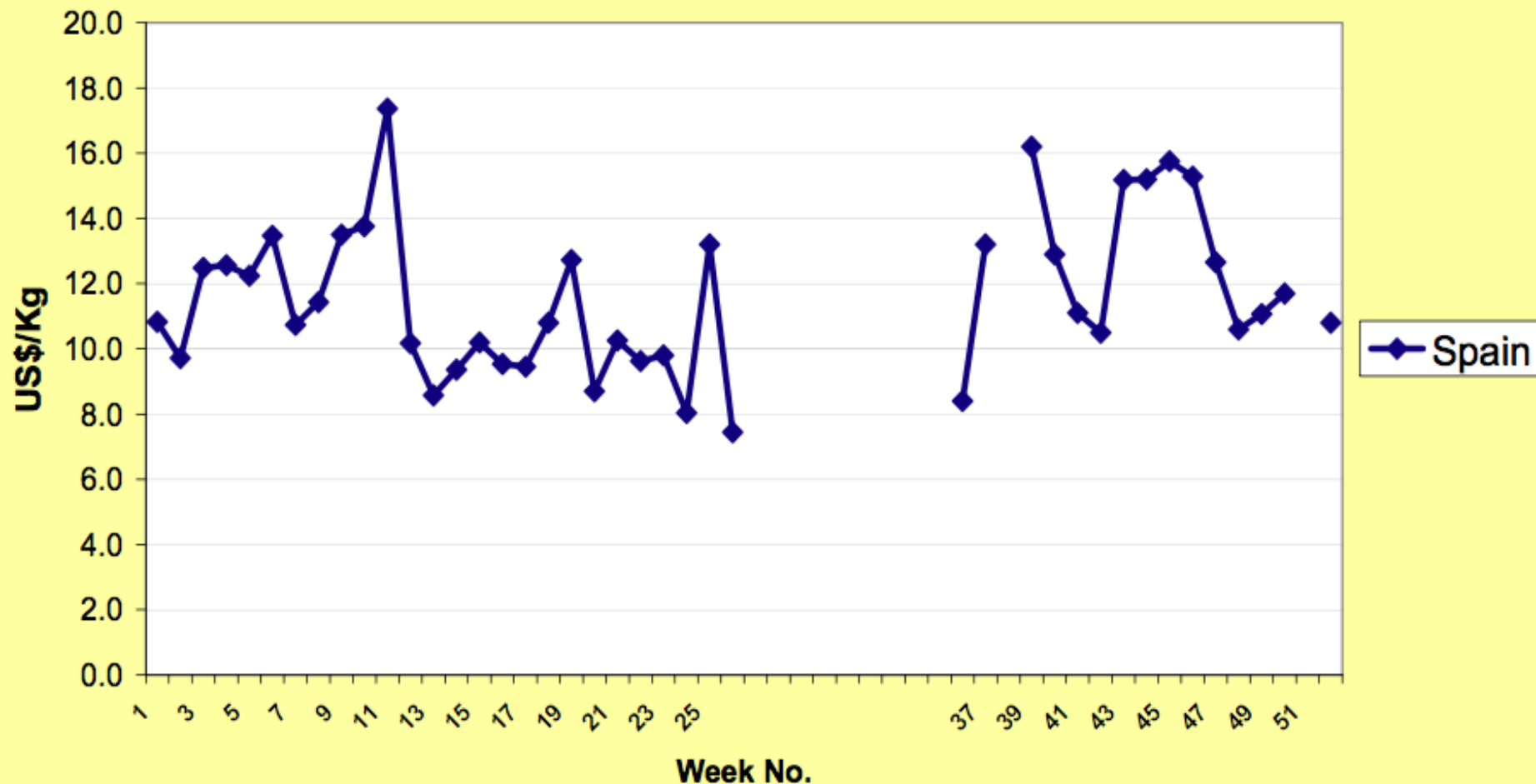
Source: USDA

Source: Honigberg (Sunbelle Mktg) GBC Monterey, CA 2011

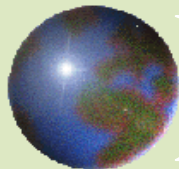


Global Berry Congress

**Figure 30 Raspberries wholesale prices in the New Covent
Garden market (2005-2009) - United Kingdom**

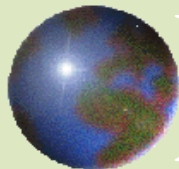


source: "Assessment of Moroccan Berries Exports (An Export Market Analysis), Moroccan Integrated Agriculture and Agribusiness Program, United States Agency for International Development, Rabat. 2010.



*Seasonal area planted (ha) to strawberry and raspberry
Huelva, Spain*

Season	Strawberry	Raspberry
2009/10	6.500	910
2010/11	6.400	943
2011/12	7.150	1320
% change	+11,7%	+40,0%

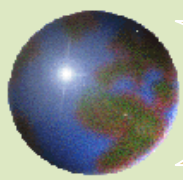


Seasonal strawberry and raspberry production (tonnes)

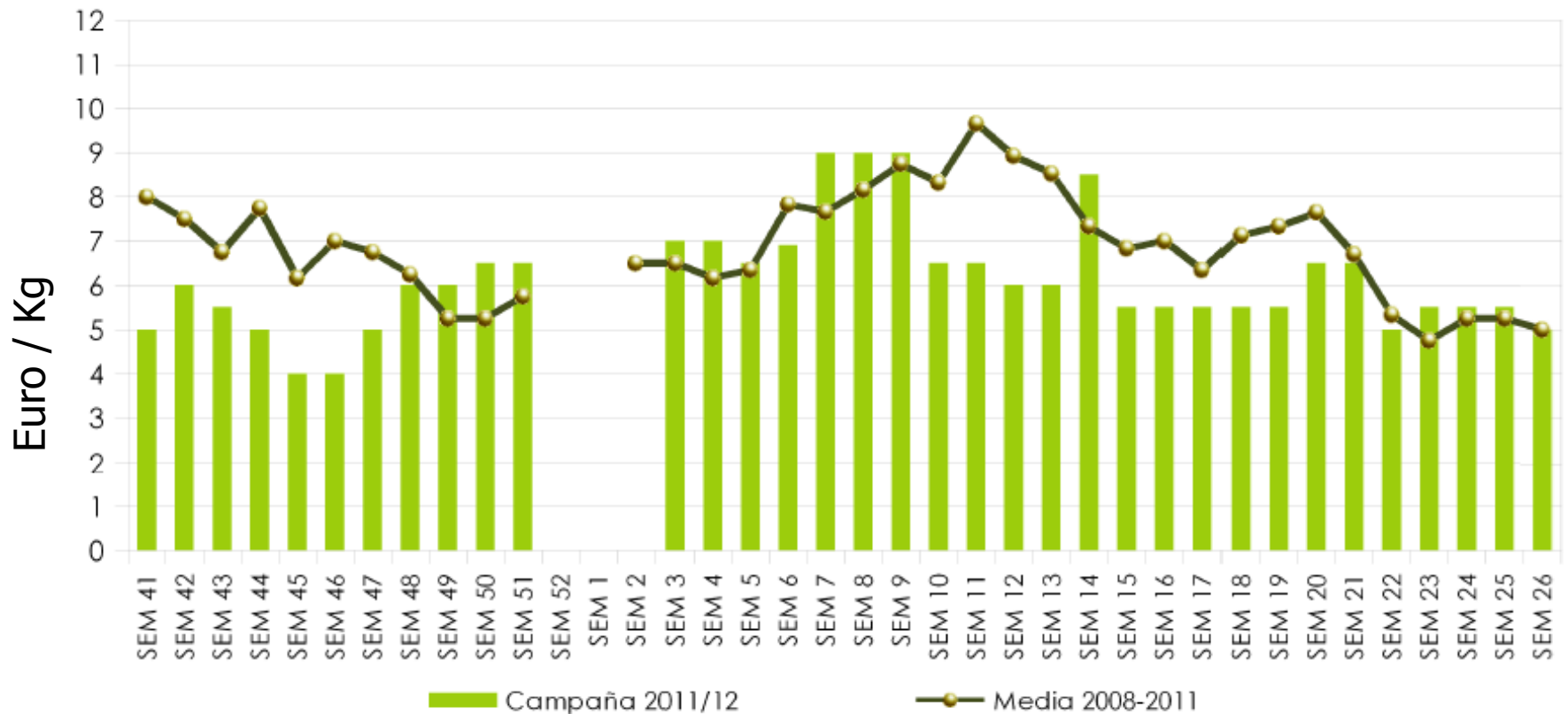
Huelva, Spain

Season	Strawberry	Raspberry
2009/10	264.355	8.250
2010/11	252.250	8.460
2011/12	280.000	12.091
% change	+11,0%	+42,9%

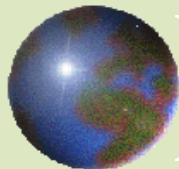
Source: CAPMA: Anuarios y Avances de superficie y
producción de Octubre 2012 .



Weekly shipping point prices for raspberry - Huelva



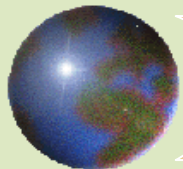
Source: Chancellery for Agriculture, Fisheries, and Environment, Spain



Volume of fresh raspberry exports (ton) - Spain

	2011 / 12 Season	variation from average of last 3 seasons
Huelva	11.829,8	+7,75%
Andalucía	12.205,8	+8,12%
España	12.824,2	+0,47%

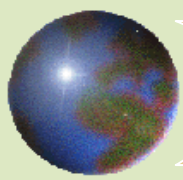
Source: Chancellery for Agriculture, Fisheries, and Environment, Spain



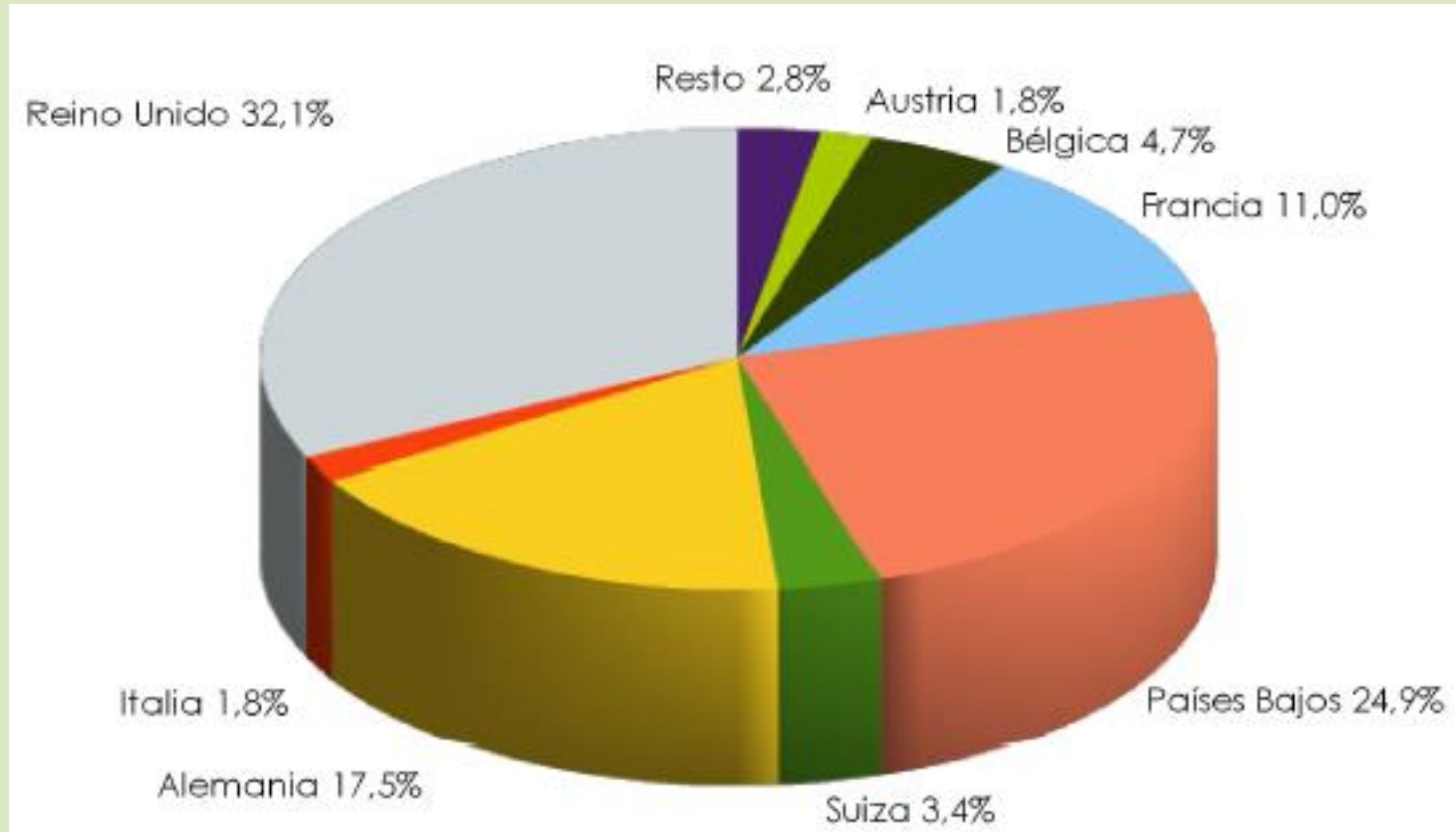
Value of fresh raspberry exports – Spain (000s Euros)

2011 / 12 Season		variation from average of last 3 seasons
Huelva	92.583,7	+16,35%
Andalucía	96.232,1	+16,65%
España	101.091,5	+9,85%

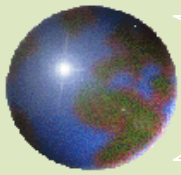
Source: Observatorio de Mercados y Precios. Junta de Andalucía



Destinations of fresh raspberry exports from Huelva

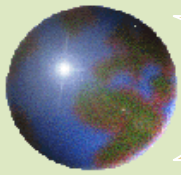


Source: Observatorio de Mercados y Precios. Junta de Andalucía



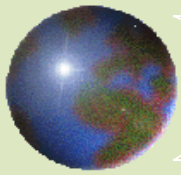
Off-season raspberry summary

- *EU market heavily supplied by Spain, some Portugal.*
- *Moroccan raspberry acreage increasing > + 1000 ha planted or planned.*
 - *2500 ha within a decade*



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