

#### RIDING THE "BLUE WAVE"





Building Demand to Keep Pace
With Expanded World Blueberry
Production



#### **Blueberry Market Situation**





 Health Interest Continues to Drive Blueberry Demand



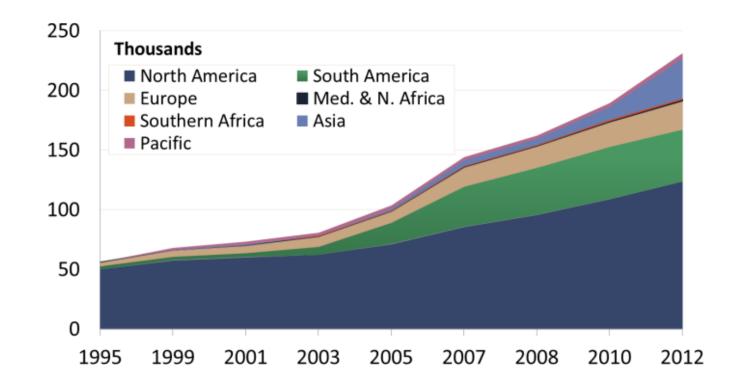
- Blueberry Interest Encourages Increased Worldwide Blueberry Production
- Industry Efforts Needed to Keep Demand Ahead of Supply



#### The Blue Wave is Rapidly Approaching



World Blueberry Acreage from 1995 to 2012 Increased from Just Over 50,000 Acres to Over 231,000 Acres





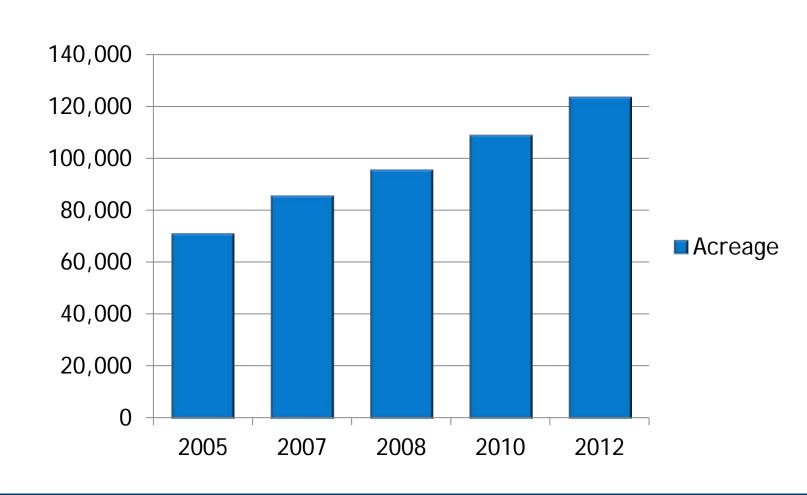


### North American Highbush Acreage Has Increased +74% Since 2005

From 71,075 Acres to 123,635 Acres







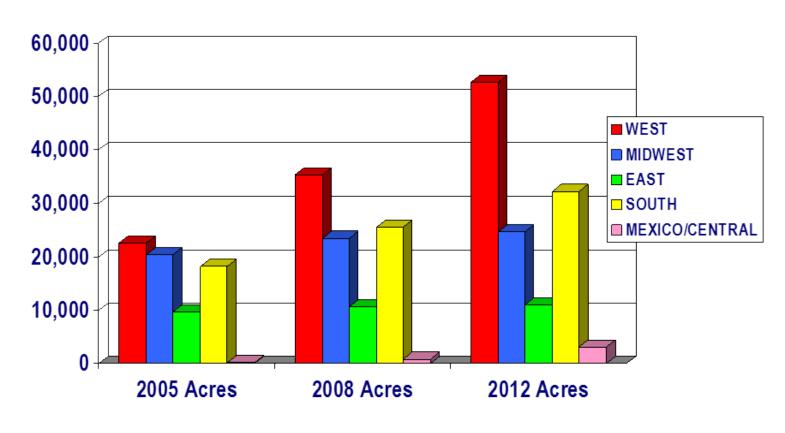




# NORTH AMERICAN HIGHBUSH BLUEBERRY ACREAGE ESTIMATES BY REGION 2005 to 2012







Impressive Acreage Growth in West and South. Traditional Growing Areas Remain Fairly Constant, though Higher Yielding Varieties Replacing Some Bushes on Existing Fields. Mexican and Central American Acreage Now Adding to the Total.





#### WORLDWIDE HIGHBUSH BLUEBERRY SUMMARY

World Acreage More than Doubled Since 2005
North American Acreage +74% while South American Acreage +142%
North and South America Account for 72% of World Acreage in 2012
Compared to 86% in 2005





WORLD ACREAGE	2005	2008	2010	2012
North America	71,075	95,597	108,931	123,635
South America	18,039	39,703	43,950	43,640
Europe	9,736	18,038	20,780	24,101
Mediterranean and North Africa	0	355	672	1,098
Southern Africa	740	910	1,124	1,146
Asia and Pacific	4,188	7,870	14,117	37,615
TOTAL	103,778	162,473	189,574	231,235



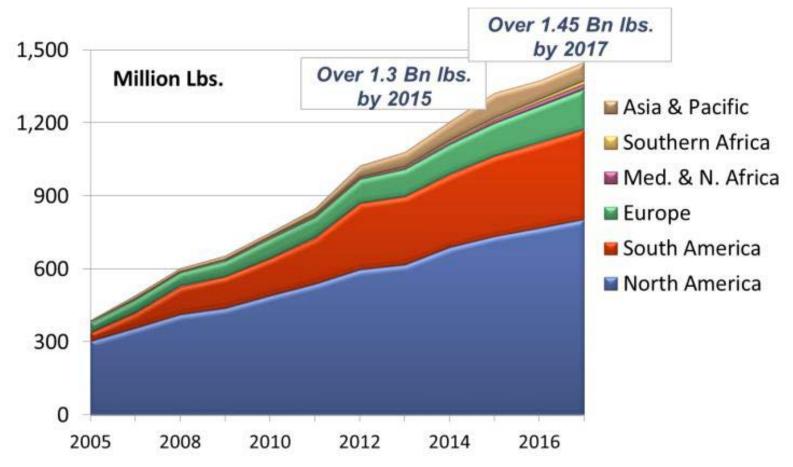


#### Predicted Growth in Worldwide Blueberry Production

From 393 Million Pounds in 2005 to 1 Billion Pounds in 2013 and More Than 1.4 Billion Pounds by 2017







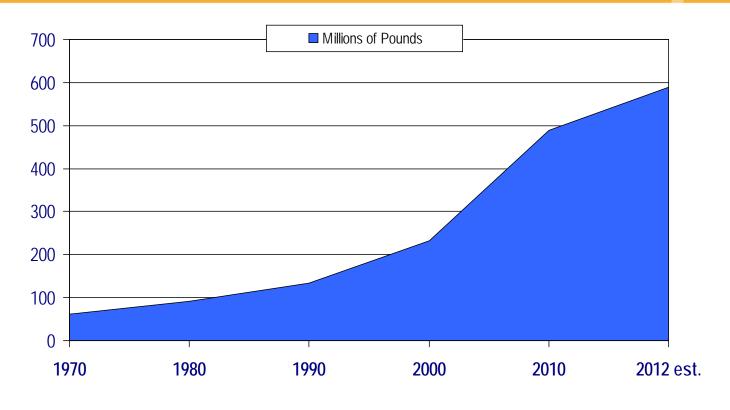




### North American Highbush Blueberry Production Trends 1970 to 2012







Production increased 8 fold from 1970 to 2010 (61 million lbs. to 489 million lbs.) The 2012 crop is currently estimated at 589 million pounds and projected to reach 805 million pounds by 2017.



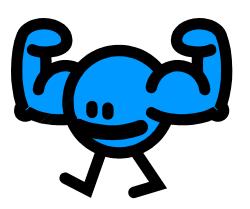


# Keeping Pace With Record Levels of Production





Given Growth Projections Need to Increase Per Capita Consumption +38% from Current Level of 36 Ounces to 50 Ounces Per Person by 2015





#### 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



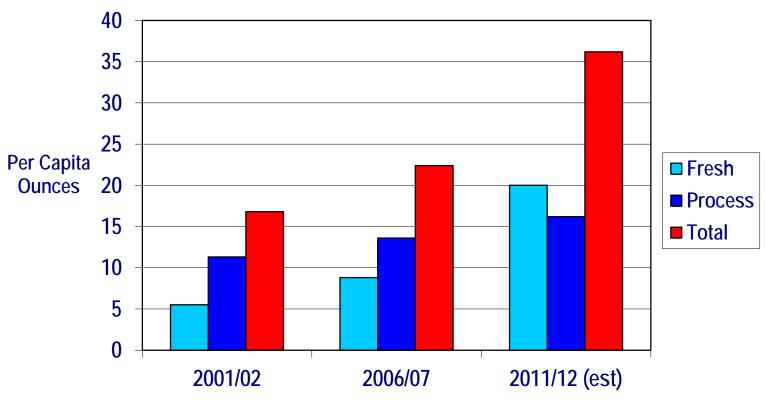




## Blueberry Interest Reflected in U.S. Per Capita Consumption Increases







Over past ten years total consumption has more than doubled from 16.8 ounces in 2001/2002 to 36.2 ounces in 2011/2012

Fresh consumption increased from 5.5 ounces to 20.0 ounces

Fresh consumption increased from 5.5 ounces to 20.0 ounces Process consumption increased from 11.3 ounces to 16.2 ounces



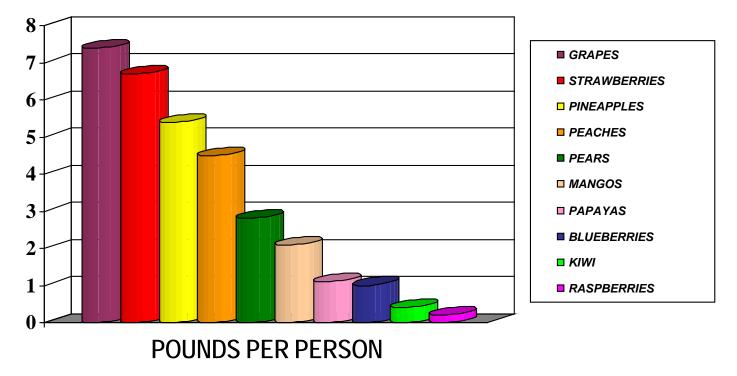


### Projected Per Capita Consumption of Various Types of Fresh Fruit in 2010

(As Reported by USDA ERS- August 2012)







Packer "2013 Fresh Trends Report" notes just 48% of survey respondents had purchased blueberries at least one time in 2012





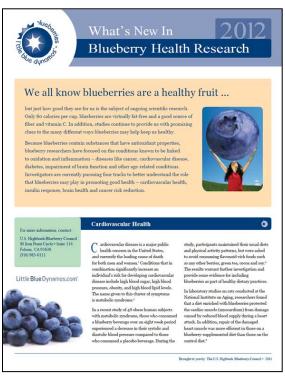
## Blueberry "Health Halo" Continues to Drive Blueberry Interest



 Need to Maintain Consumer Awareness of Blueberries and Health Given More Aggressive Claims By Other Fruit and Vegetable Groups

 Expand Health Research and Move to Human Clinical Trials





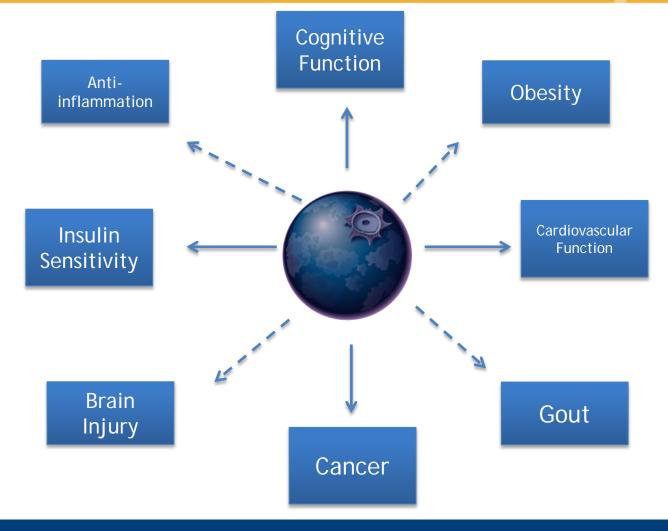




#### Current Areas of Focus in USHBC Health Research-Brain Health, Metabolic Syndrome, Cancer









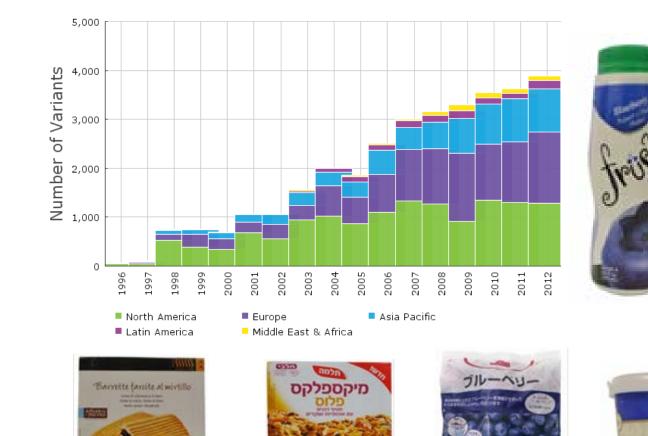


### Worldwide Interest in New Blueberry Products Continues to Grow

(Mintel Data)











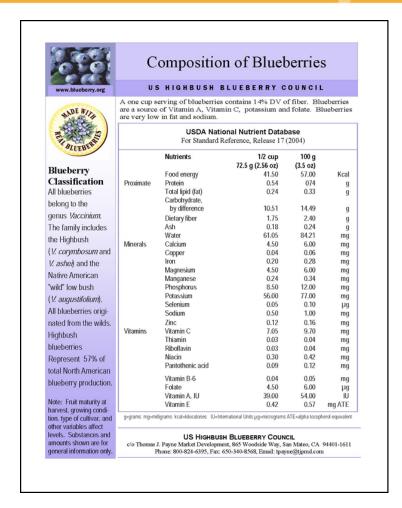
## Efforts In Place to Encourage New Product Development with Blueberries











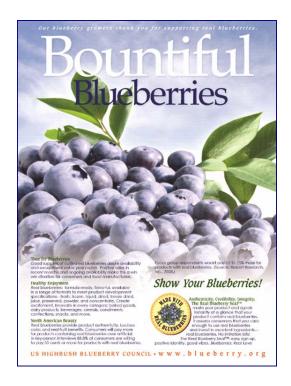


#### Food Manufacturer Promotion-Advertising













### Blueberry Coverage in Food Trade Publications









# Exploring Unique Blueberry Uses- Pet Foods















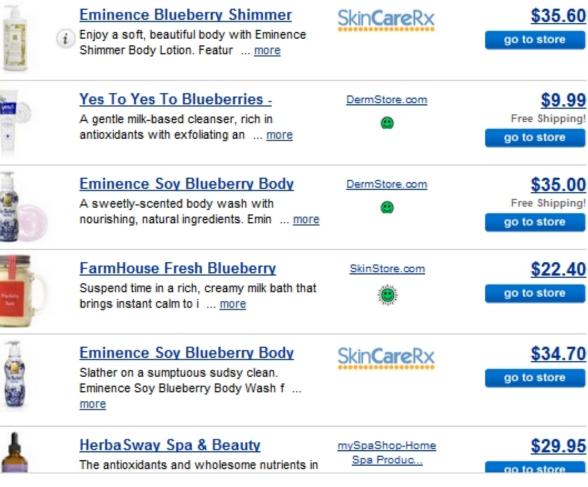


#### Cosmetics











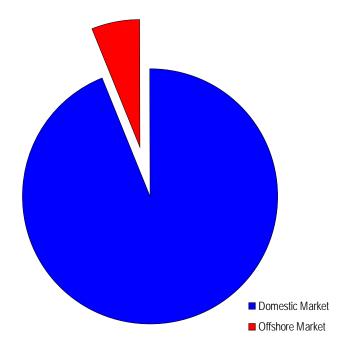


#### Offshore Market Offers Potential



### Just Over 6% of U.S. Highbush Blueberry Crop Shipped Offshore in 2012

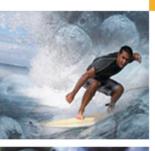








# International Market Development Activities



- Trade Shows
- Websites
- Retail Promotion
- Trade and Consumer Advertising and Publicity







## International Trade Shows and Foodservice Promotions















#### International Websites











#### Retail Promotions-India















#### Retail Promotions- Taiwan















#### Retail Promotions-Japan











#### Trade and Consumer Advertising















# International Television Coverage















#### **Domestic Promotions**



 Leveraging Blueberry Health Awareness



 Attracting New Users through Little Blue Dynamo Lifestyle Campaign





#### Target Audiences



#### Primary:

- Women 25 to 45
- Average to Above Average Income
- Mothers and Young Professionals



• Women 45+









#### Action



Teaming with Celebrity Spokesperson who relates to target audience



Allison Sweeney-Host of "The Biggest Loser" NBC TV

Heavy Emphasis on Social Media to Reach Target







# Spokesperson Delivery of Little Blue Dynamo Message



- Trade and Consumer Press Releases
- Face to Face Meetings with Media
- Videos, Tips and Recipes added to USHBC Website
- Celebrity and USHBC Social Media Announcements- Facebook, YouTube, Twitter







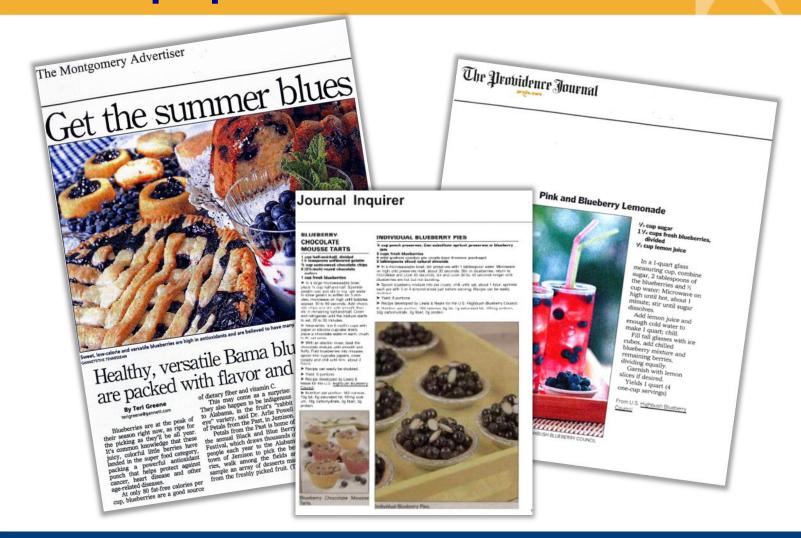




# Consumer Promotion - Newspapers











#### Magazines









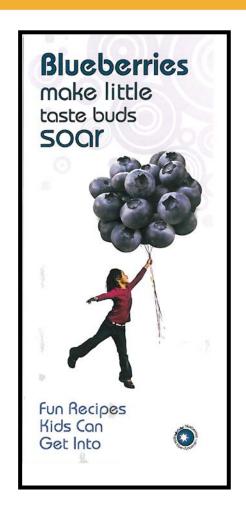


#### Consumer Recipe Leaflets











# National and Regional Television Coverage















# Consumer Promotion - Website and Banner Ads











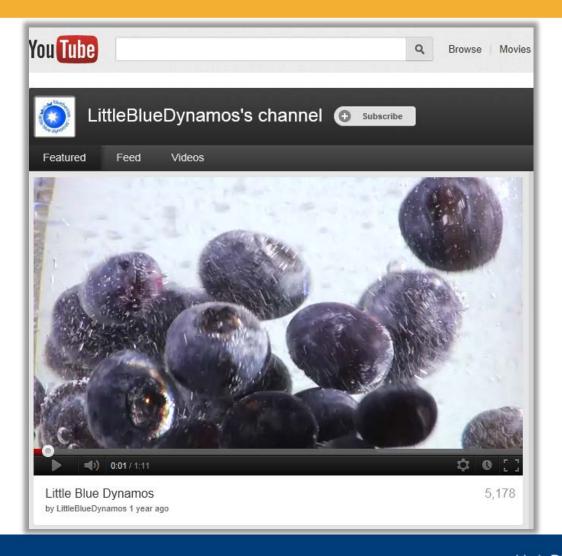




# Consumer Promotion Via Social Media: YouTube









### **Twitter**









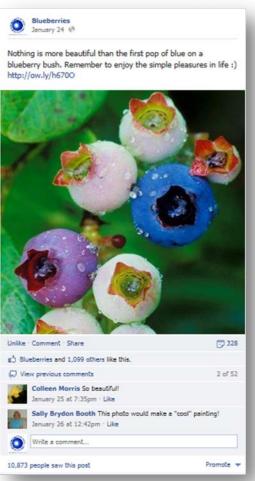


### **Facebook**











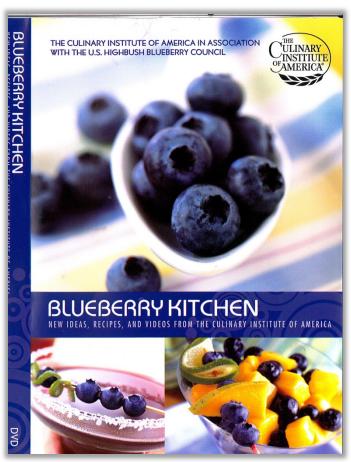


### **Foodservice Promotion**







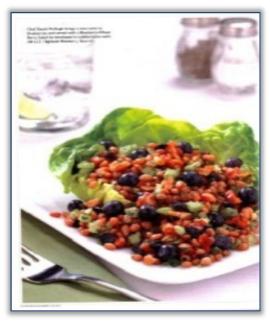




## Blueberry Coverage in **Foodservice Publications**











bright color and a healthy dose of valuable phytonutrients to this gluten-free dessert.

## FOODSERVICE DIRECTOR







# Foodservice Promotion - Trade Advertising







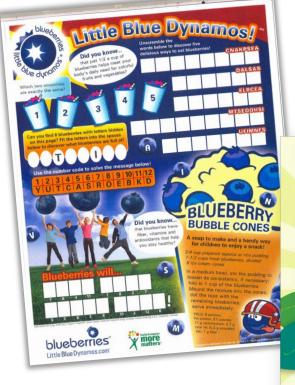




# Foodservice Promotion-Grade Schools and Colleges

















## ACTION PLAN-Staying Ahead of the "Blue Wave"



- Continue Blueberry Health Exploration With a Move to Extensive Human Feeding Trials
- Leverage International Opportunities



- Continue to Address Core User Group (Women 45+) and Use Lifestyle Themed Promotions to Attract New User Group of Women 25 to 45 Years of Age-- "Little Blue Dynamos"
- Pursue USHBC Assessment Increase from 6/10ths Cent Per Pound to 9/10ths Cent Per Pound to More Aggressively Fund and Promote Health Message





## "Ride The Blue Wave" Cell Phone Site-Your Source for USHBC Information



- USHBC Market Promotion Updates
- Up-to-date Health Research Findings
- Blueberry Usage, Demographics and Statistics
- Type <u>www.ridethebluewave.com</u> in your Web Browser and Add to your Home Screen











#### U.S. HIGHBUSH BLUEBERRY COUNCIL

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