

Blueberry update 2026

More supply, tighter margins, and greater differentiation are rewriting the industry's economic playbook

November 2026

Rabobank

Executive summary



The calendar is filling

Global fresh blueberry exports will likely surpass 1m metric tons in 2027/28, led by Peru, with a broader group of origins also expanding. Supply calendars in the US and Europe are becoming more crowded, while China is emerging as a regional exporter. Seasonal timing remains important, but competitiveness will increasingly depend on reliable supply, commercial consistency, destination strategy, and a competitive cost structure.

The economics are changing

Rising labor, input, and logistics costs are increasing margin pressure, while blueberry prices have not consistently kept pace. The right genetics can improve marketable yield, fruit quality, harvest efficiency, and input-use efficiency, but performance depends on local growing conditions, production systems, and market fit. Variety selection and agronomic execution will become increasingly important to profitability.

Demand must be earned

Blueberries retain considerable consumption potential as Europe, Asia, and other markets increase their share of global imports. Yet greater availability will not automatically generate sustained demand. Mature markets need deeper household penetration, higher purchase frequency, and more eating occasions, while emerging blueberry markets require investment in awareness, affordability, distribution, and suitable packaging formats.

The industry grew as expected, but competition changed faster

The competitive map has been redrawn

- A decade ago, global blueberry exports were concentrated among a relatively stable group of established suppliers. Chile, Canada, the US, Argentina, Spain, and Poland accounted for most internationally traded volume, while Mexico was emerging as an exporter. Peru was only beginning its rapid ascent, while Morocco had yet to become a significant global supplier. By 2025/26, the landscape had changed markedly. Peru had become the dominant fresh-blueberry exporter, Morocco one of the fastest-growing suppliers, and China an emerging regional exporter, particularly within Asia. The industry's center of gravity has shifted from a relatively concentrated group of traditional exporters to a larger, more diverse, and more competitive supply network (see figure 1).

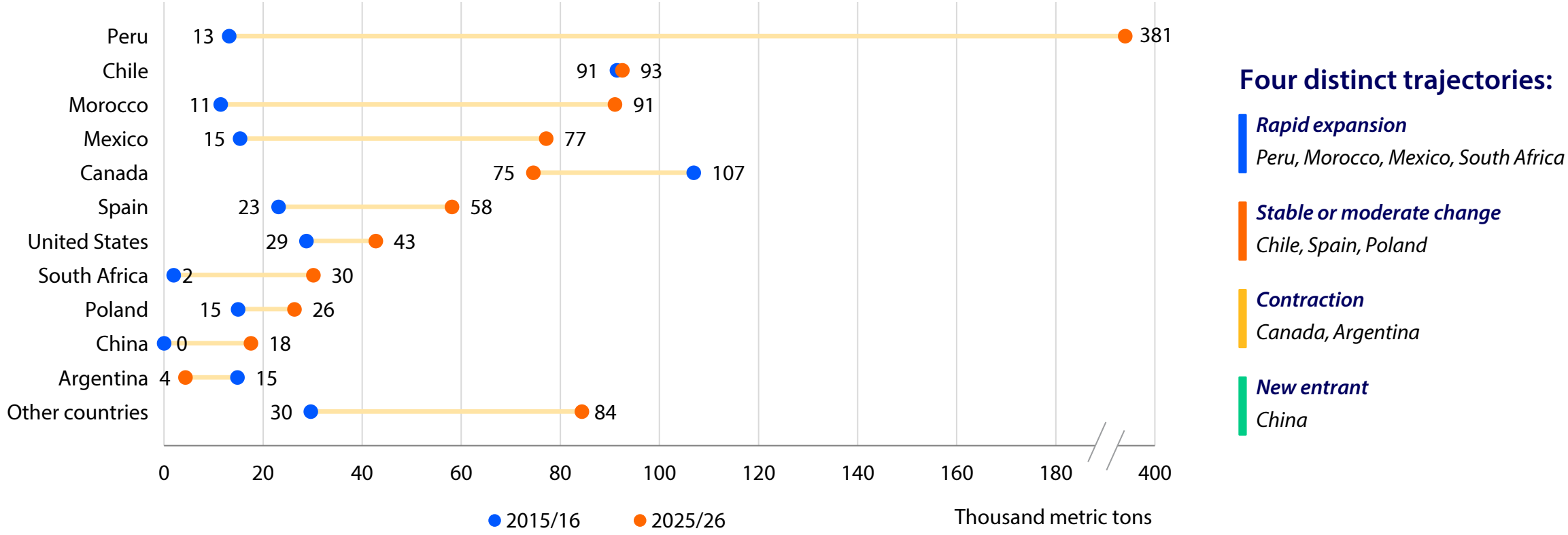
We anticipated the growth, but underestimated the competitive shift

- Our outlook from five years ago correctly anticipated Peru's continued expansion and emergence as the leading global fresh-blueberry exporter. We also expected demand to grow sufficiently to absorb a substantial increase in supply. Global exports ultimately exceeded our previous projection, although annual supply remained volatile and the composition of growth differed from our expectations (see figure 2). What we underestimated was how quickly the competitive structure would evolve. China shifted from a predominantly domestic production and consumption market to become the world's largest producer and an increasingly relevant regional exporter. Morocco expanded faster than expected, while several smaller and emerging origins gained commercial relevance sooner than anticipated. Competitive expansion is extending beyond the largest exporters, although the pace and durability of growth vary considerably by origin (see figure 3).
- The broader lesson is that country-level acreage and export volume are no longer sufficient measures of competitive strength. Advantage increasingly depends on the ability to convert genetics, agronomic performance, fruit quality, harvest efficiency, timing, logistics, and market access into profitable, saleable volume.

Growth has redistributed competitive weight

Global exports nearly tripled as Peru took the lead and a broader group of origins gained scale

Figure 1: Fresh blueberry exports by origin, 2015/16 vs. 2025/26



Four distinct trajectories:

Rapid expansion
Peru, Morocco, Mexico, South Africa

Stable or moderate change
Chile, Spain, Poland

Contraction
Canada, Argentina

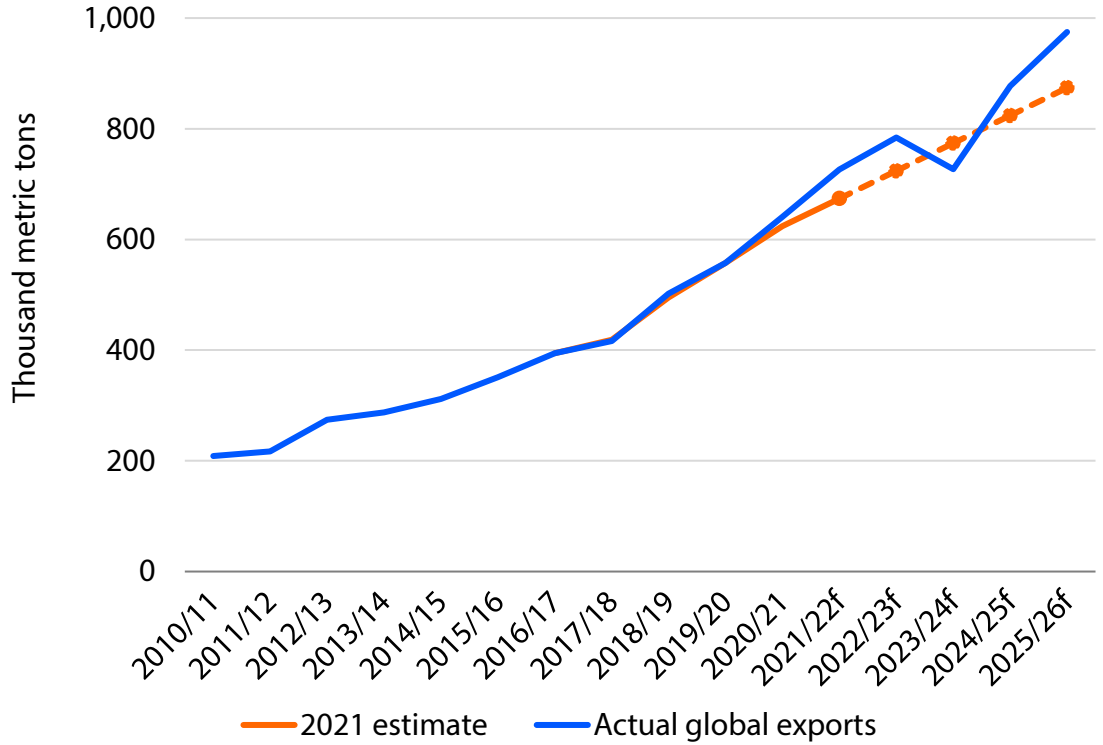
New entrant
China

Source: *Trade Map, ODEPA, Office des Changes, SENASA, USDA AMS, RaboResearch 2026*

Global exports exceeded our 2021 outlook

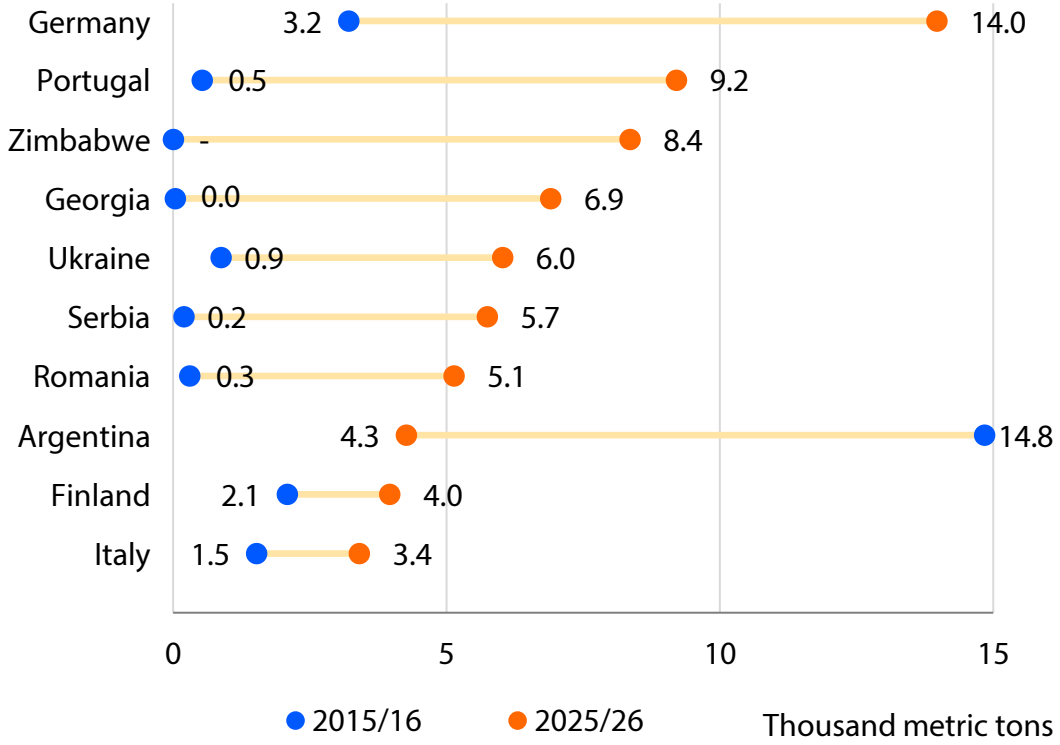
But the true surprise is outside the top 10 exporting countries

Figure 2: Actual exports against the 2021 forecast for global fresh blueberry exports, 2010/11-2025/26f



Note: Forecast published in our 2021 blueberry report.
Source: Trade Map, USDA, RaboResearch 2026

Figure 3: Fresh blueberry exports for countries outside the top 10, 2015/16-2025/26



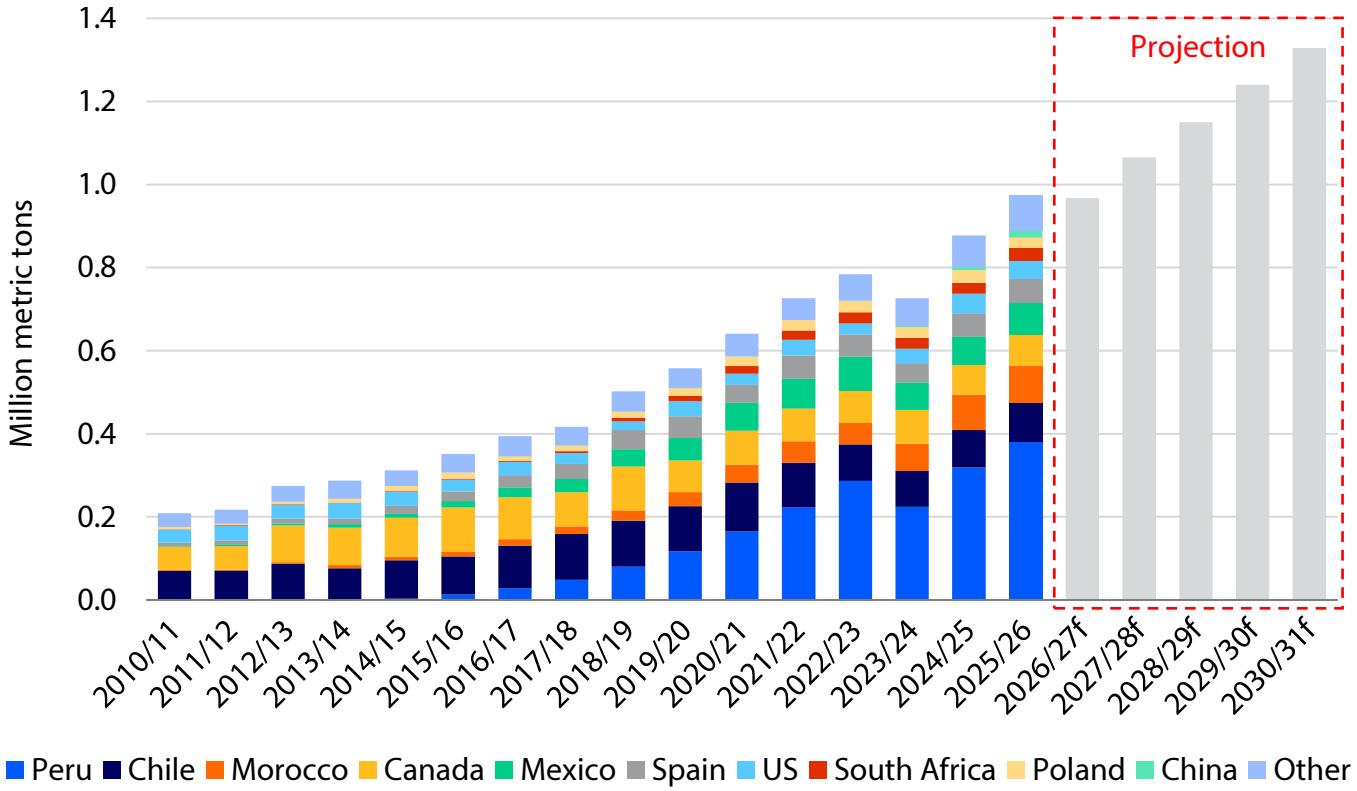
Note: Countries ranked 11th to 19th in global exports in 2025/26.
Source: Trade Map, Eurostat, RaboResearch 2026

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More supply will raise the competitive bar

Supply growth will increase competition across origins, weeks, and destination markets

Figure 4: Global blueberry exports, 2010/11-2030/31f



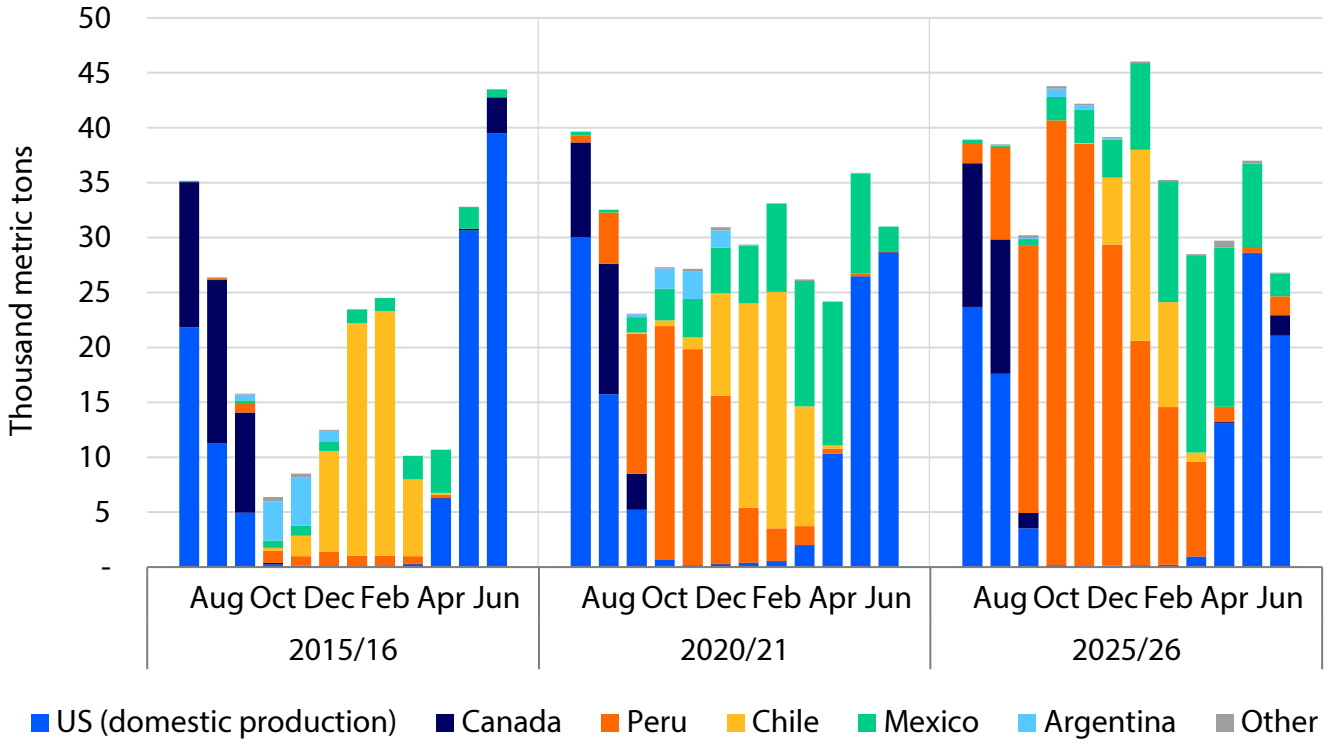
Source: *Trade Map, ODEPA, Office des Changes, SENASA, USDA AMS, RaboResearch 2026*

- Global fresh blueberry exports are expected to ease in 2026/27 as El Niño weighs on Peruvian production, before exceeding 1m metric tons in 2027/28. Thereafter, maturing plantings, varietal renewal, and yield improvements could lift exports to approximately 1.3m metric tons by 2030/31 (see figure 4).
- Peru is expected to lead incremental growth, while Morocco, China, South Africa, and emerging origins add competition across more weeks.
- Weather and agronomic constraints will continue to affect volume, timing, quality, packout, and market allocation.
- As supply gaps narrow, competitive advantage will migrate toward better eating quality, reliable execution, and lower delivered cost during key market windows.

The US calendar is filling unevenly

Fall and winter supply has expanded most, while March and April remain less crowded

Figure 5: Monthly availability of fresh blueberries in the US, 2015/16-2025/26



Source: *USDA, RaboResearch 2026*

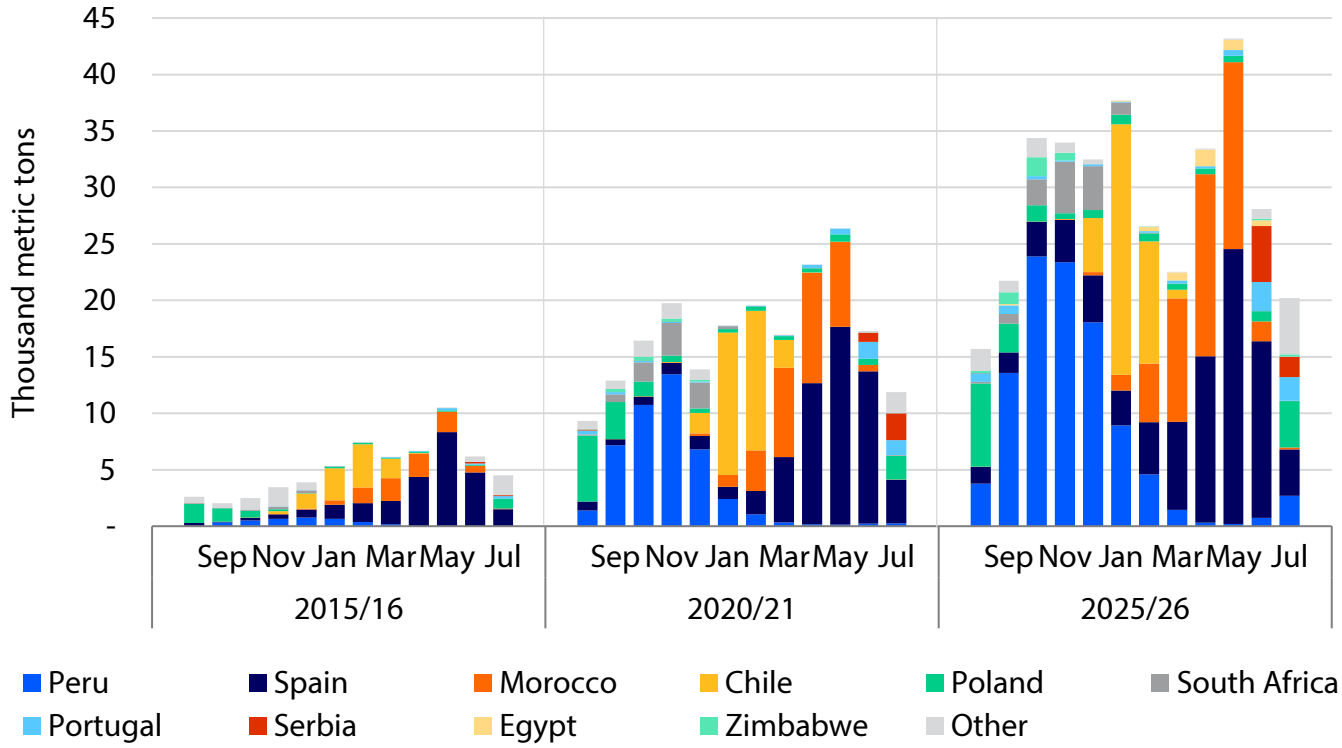
- US blueberry availability has expanded most strongly from August through February, largely due to increased Peruvian supply. Chile's relative role has declined, while Mexico has become the main supplier bridging Southern Hemisphere supply and the US domestic season (see figure 5).
- March and April remain less crowded than adjacent months as Peruvian and Chilean volumes decline and US production begins to ramp up. Mexico is the main supplier during this seasonal transition and benefits from proximity to the US, although recent production constraints have limited further growth.
- US production normally strengthens from April, followed by Canada later in the summer. Domestic production was considerably lower in June 2026 after adverse weather affected several US regions (see page 11). As origins increasingly overlap, commercial opportunities will depend less on broad seasonal positioning and more on specific weeks when marketable supply remains constrained.

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Europe's calendar is becoming more crowded

Origin overlap is shifting competitive advantage from broad seasons to specific months

Figure 6: Monthly imports of fresh blueberries in the EU-27, 2015/16-2025/26



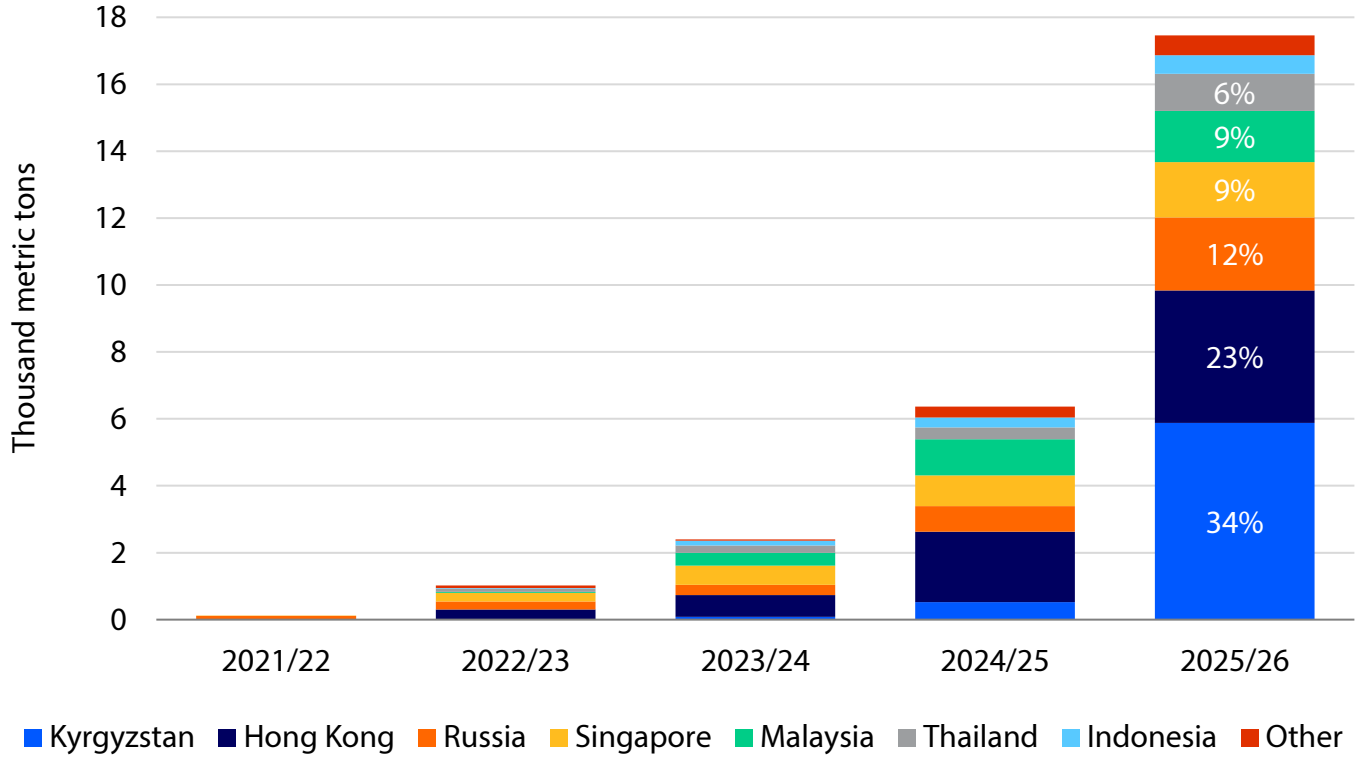
Note: *Re-exports excluded*
Source: *Eurostat, RaboResearch 2026*

- EU-27 blueberry imports have increased substantially over the past decade, with the largest gains from September through May. Peru has driven growth from September through January, while Morocco and Spain remain the main suppliers during the European spring peak (March-to-May) (see figure 6).
- Origin overlap has increased as Peru extends further into the early months of the calendar year and Morocco adds volume ahead of and alongside Spain. South Africa and a growing group of smaller suppliers are also adding competition around established transitions between supplying origins.
- Spring remains an important commercial period, but rising Moroccan and Spanish volumes are narrowing the seasonal advantages for alternative origins. Commercial opportunities will depend increasingly on specific weeks, marketable quality, the ability to meet retailer requirements, and logistical reliability.

China is ramping up quickly

Now the ninth-largest exporter of fresh blueberries, with net-exporter status in sight

Figure 7: China's fresh blueberry exports by destination, 2021/22 – 2025/26



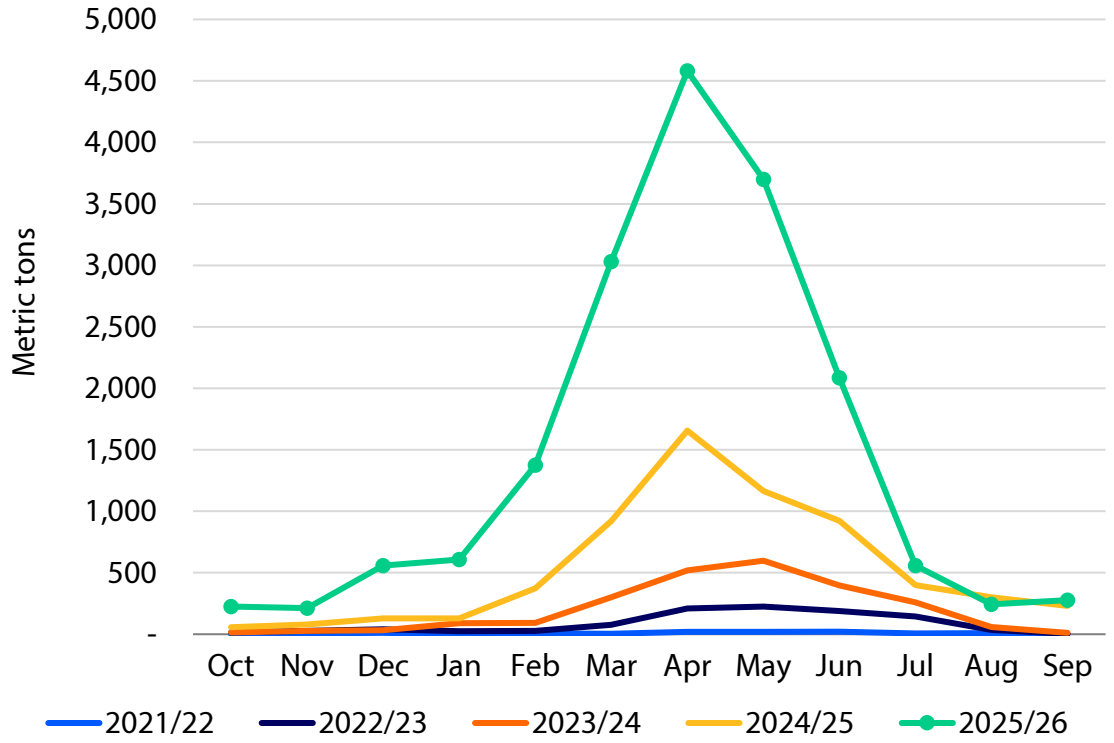
Note: *Season starts in October of the first year, ends in September of the second year..*
Source: *GACC, RaboResearch 2026*

- China's fresh blueberry exports have expanded rapidly, from 115 metric tons to 17,500 metric tons in five seasons, representing a 251% compound annual growth rate (CAGR). Rising productivity and total production, which reached 565,000 metric tons in 2025, have supported this growth. While Russia, Singapore and Malaysia remain relevant markets, the emergence of Kyrgyzstan as the leading destination in 2025/26 signals an expanding reach into markets to China's west (see figure 7).
- Exports remain concentrated between March and May (61% on average over the past three seasons), but growth at both ends of the season is extending China's export window. Increasing year-round availability of domestically produced fresh blueberries is also putting competitive pressure on the Chilean and Peruvian imports between August and January (see figure 8).
- China's blueberry industry is following a growth and export trajectory previously seen in table grapes, walnuts, and other crops. If current trends continue, China could become a net blueberry exporter by 2027/28 (see figure 9).

China is moving toward a net-export position

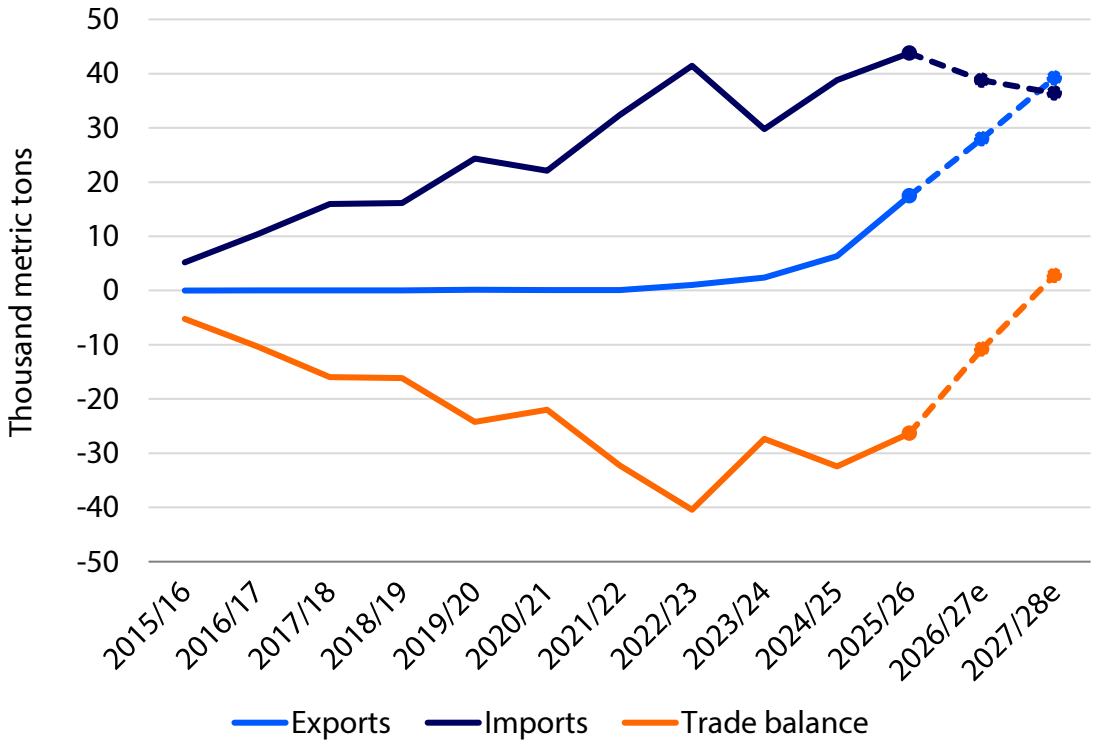
A widening export window and rising domestic supply are reshaping Asian trade flows

Figure 8: China's monthly fresh blueberry exports, 2021/22-2025/26



Source: GACC, RaboResearch 2026

Figure 9: China's fresh blueberry trade balance, 2015/16-2027/28e



Source: GACC, RaboResearch 2026

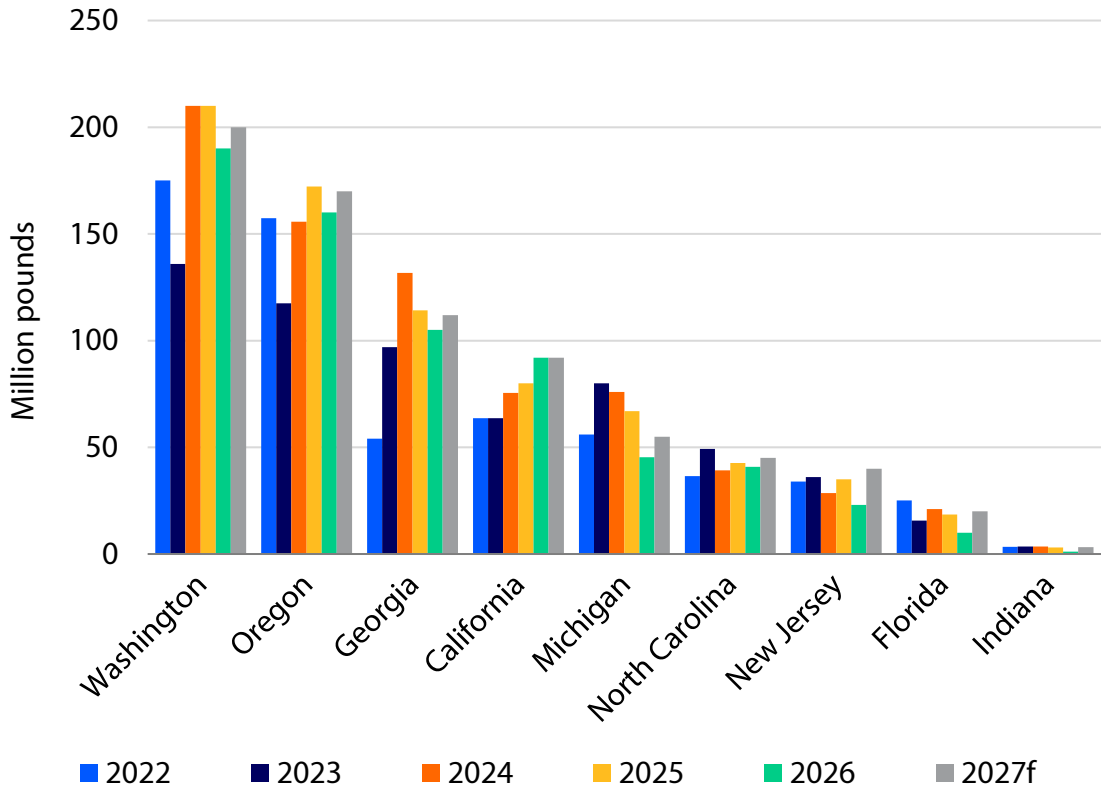
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US production is expected to rebound in 2027

Weather disruptions highlight the strategic value of regional supply diversification

- US highbush blueberry production totaled 667.3m pounds in 2026 and is forecast to rise 10.5% to 737.2m pounds in 2027. Washington remains the largest producing state, followed by Oregon. Most projected growth comes from recovery in New Jersey, Michigan, Florida, Oregon, Washington, and Georgia, while California remains stable (see figure 10).
- Based on reported state-level shares, organic blueberries represented an estimated 22.1% of US highbush production in 2026. Washington, California, and Oregon supplied approximately 86% of estimated organic volume, confirming the western concentration of organic production. California recorded the highest organic share at 37%, followed by Washington at 32%, and Oregon at 20% (see figure 11).
- Fresh-market production represented 55.6% of US highbush output in 2026 and is forecast to reach 56.8% in 2027. Washington and Oregon remain processing-oriented, while most eastern and southern states direct the majority of output to fresh markets. The projected increase reflects stronger production in states focused primarily on the fresh market (see figure 12).

Figure 10: US blueberry production by state, 2022-2027f



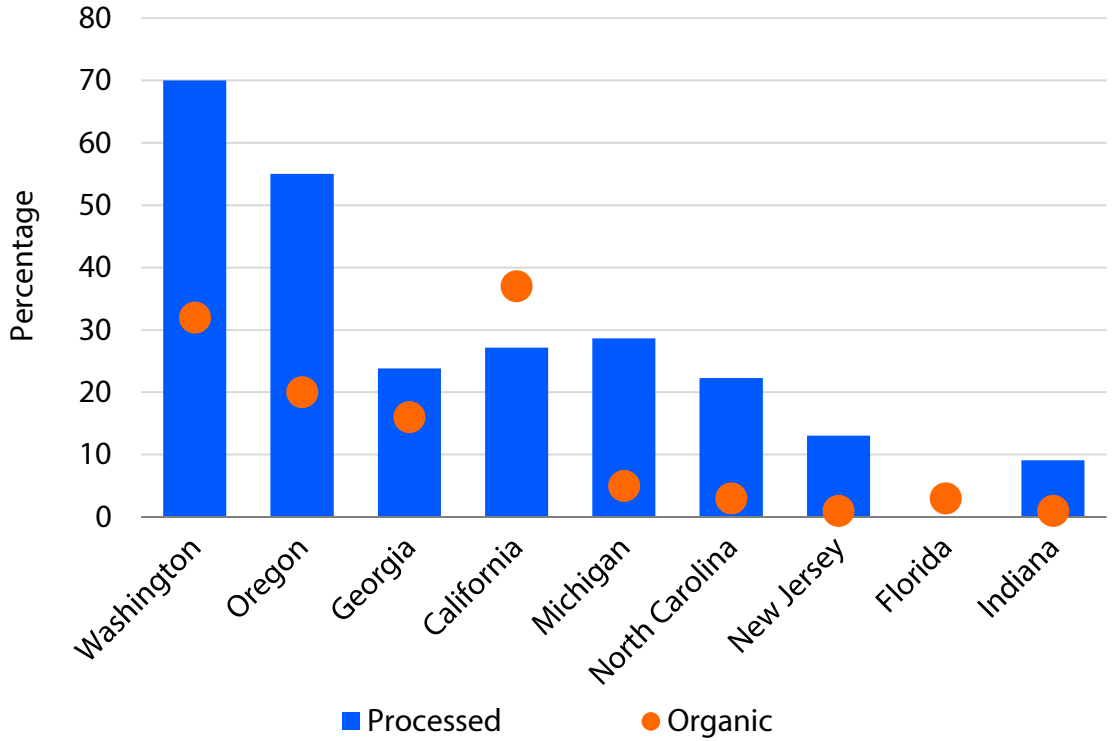
Note: *Production totals include fresh and processed blueberries .*
Source: *NABC, RaboResearch 2026*

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Distinct regional production models in the US

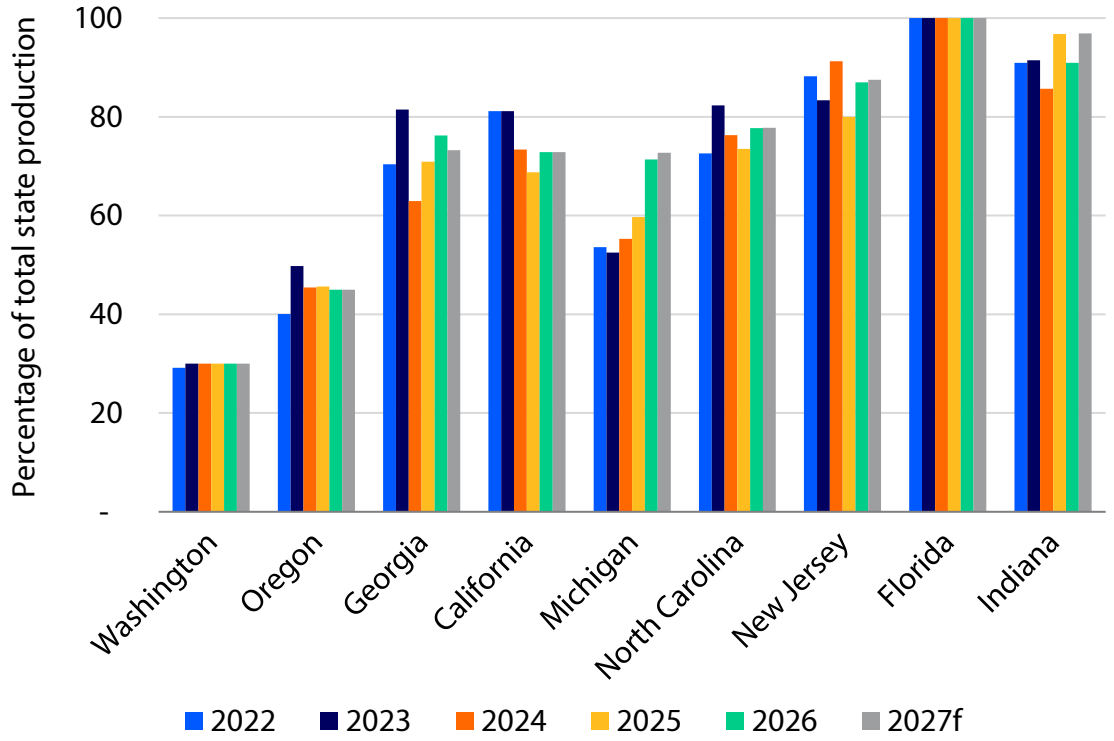
Processing dominates in Washington and Oregon, while fresh markets dominate in other major states

Figure 11: Processed and organic shares of US blueberry production by state, 2026



Note: *Processed and organic shares are independent.*
Source: *NABC, RaboResearch 2026*

Figure 12: Fresh-market share of US blueberry production by state, 2022-2027f



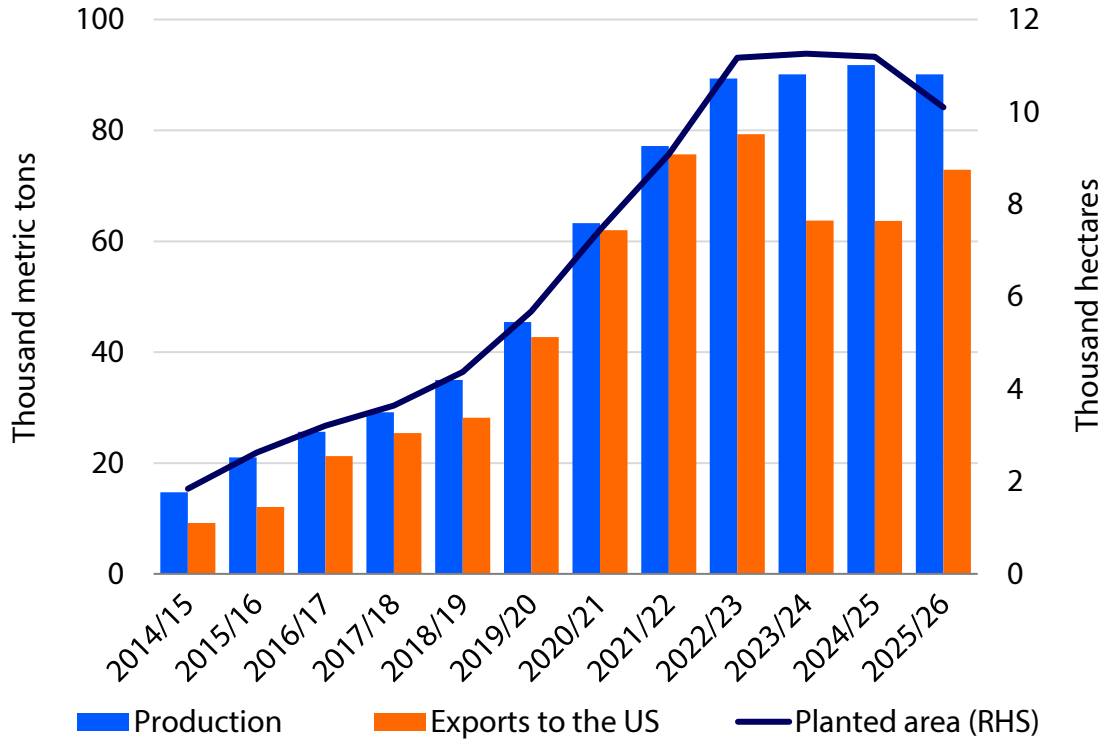
Source: *NABC, RaboResearch 2026*

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Mexico's growth now depends on productivity

Lower acreage and recovering exports suggest better varieties and production practices

Figure 13: Mexican fresh blueberry figures, 2014/15-2025/26



Source: *Aneberries, RaboResearch 2026*

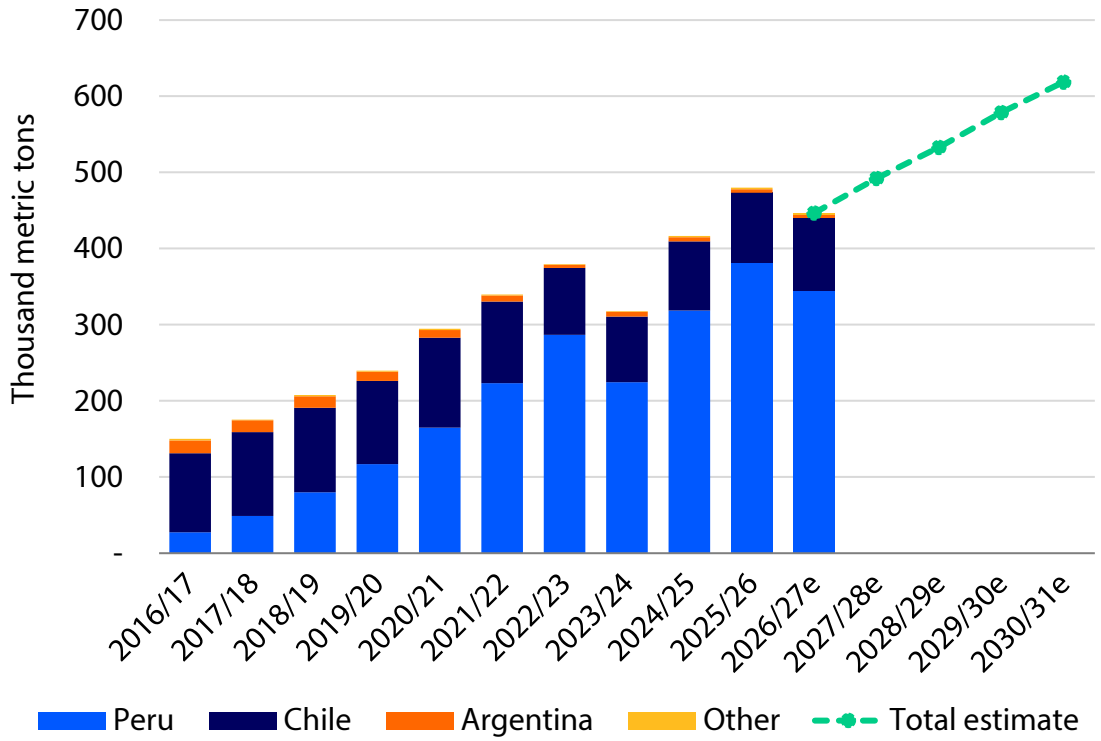
- Mexico's blueberry industry expanded rapidly through 2022/23, supported by growth in planted area, production, and exports to the US. The following two seasons were more challenging, as pest pressure, rising labor costs, uneven productivity, and stronger competition weakened returns and contributed to the removal of less-competitive acreage.
- US-bound exports rebounded in 2025/26 despite a further decline in planted area, while production remained close to 90,000 metric tons (see figure 13). This divergence may reflect improving yields, varietal renewal, and better production practices, as well as a greater focus on acreage capable of producing export-quality fruit. However, additional seasons will be needed to determine whether the productivity improvement is structural.
- Mexico's future competitiveness will depend less on acreage expansion and more on adopting cultivars that improve marketable yield, fruit quality, harvest efficiency, and shelf life. Proximity to the US remains an important advantage, particularly during the March-April transition of the season, but maintaining profitability will require stronger agronomic execution.

South America's next wave of growth

Varietal innovation and new packaging formats are redefining its role in global supply

- South American fresh blueberry exports have more than tripled over the past decade, driven primarily by Peru's rapid expansion (see figure 14). Chile will remain an important supplier, with its export window following Peru's. After five consecutive years of decline, Chilean planted area has stabilized, while older, less profitable orchards are gradually being replaced, renewing the country's production base. Proprietary varieties are playing an increasing role in this transition and accounted for 35% of Chilean fresh blueberry exports in 2025/26.
- Looking ahead, El Niño is expected to weigh on Peruvian blueberry production in 2026/27 and potentially 2027/28. However, planted area continues to expand, reaching 29,000 hectares according to Proarándanos, while the increasing adoption of proprietary varieties will support production growth over the medium term.
- At the same time, smaller emerging suppliers, including Colombia, Ecuador, and Brazil, are expected to expand production at a more measured pace, further diversifying South America's supply base. Combined with continued growth from established origins, this could lift regional fresh blueberry exports above 600,000 metric tons by the start of the next decade.

Figure 14: South American fresh blueberry exports, 2016/17-2030/31f



Source: *Chilean Blueberry Committee, Proarándanos, SENASA, Trade Map, Customs, RaboResearch 2026*

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The sources of profitable growth are changing

More supply and greater choice are raising the importance of productivity, differentiation, and market fit

GLOBAL SUPPLY

More origins • More acreage • More weeks



Supply keeps expanding

CONSUMERS

Health • Value • Convenience • Trust



Demand must be earned

COMPETITION

Quality • Timing • Market access • Cost



Competition is rising

GENETICS

Higher yields • Better-quality fruit • Greater input efficiency



Genetics are improving

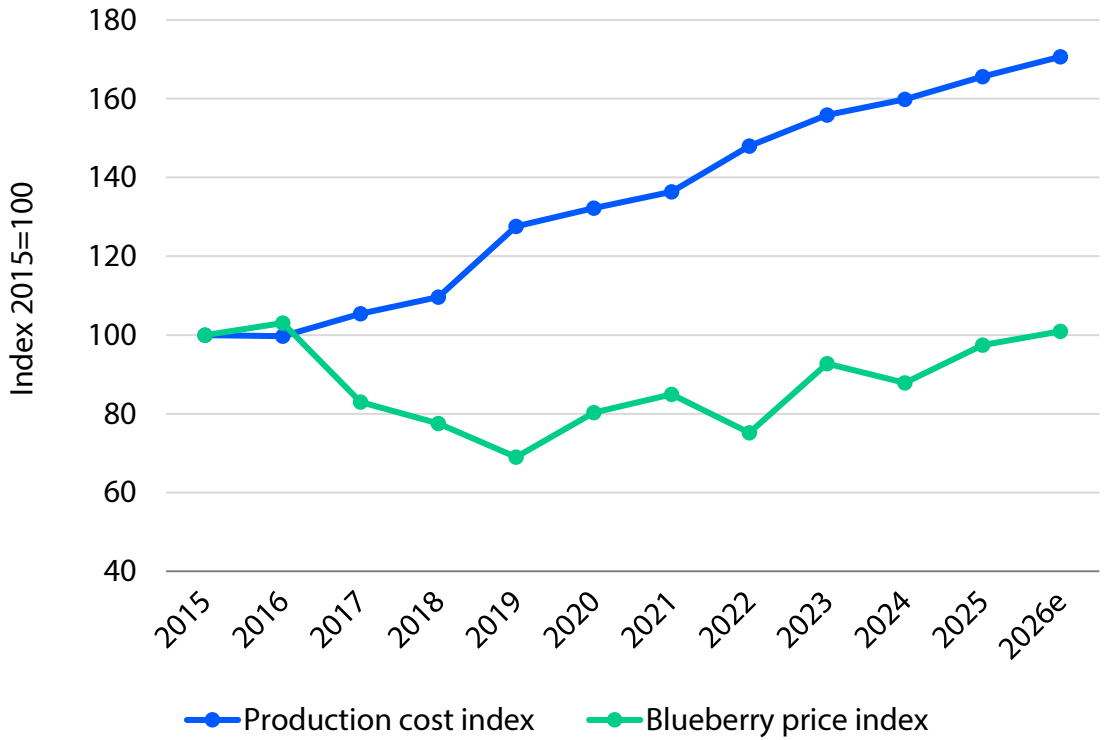
MORE SUPPLY + MORE CHOICE = HIGHER STANDARD

The blueberry industry is entering a more demanding phase of growth. Expanding supply and greater overlap between origins are reducing the competitive advantage of volume and seasonal timing alone, while rising production and logistics costs are putting additional pressure on margins. At the same time, improvements in genetics, fruit quality, and packaging formats are creating a wider range of market positions and price points. In this environment, competitiveness will depend increasingly on the returns generated from each hectare rather than total production alone. The strongest production systems will combine marketable yield, labor efficiency, harvest efficiency, consistent quality, and competitive delivered cost with a clear fit between the fruit, customer, market, and consumption occasion.

Can prices keep pace with costs?

Structural labor pressures and input-cost volatility are tightening margins

Figure 15: Development of production costs versus blueberry prices in Spain, 2015-2026e



- Production costs continue to rise in most berry-producing countries worldwide, mainly due to rising labor costs. In recent years, farm input price shocks caused by events such as the war in Ukraine and the Middle East conflict have added to this pressure. Higher energy prices associated with these disruptions raise costs across inputs and services, including fertilizers, plastic packaging, plastic pots, substrates, and energy for irrigation and transportation. RaboResearch estimates that blueberry production costs could rise by 3% to 5% annually in 2026 and 2027, excluding post-harvest cost increases. Existing input inventories, contracts, and hedges determine how quickly these cost increases take effect.
- Cost increases extend beyond primary producers. Trucking and sea freight rates have risen, alongside packaging and storage costs.
- Our comparison of the development of production costs and Spanish blueberry prices illustrates pressure on grower margins (see figure 15). While prices have fluctuated over the past decade and are estimated to be close to their 2016 level in 2026, costs have risen steadily. Growers need to use the right levers to maintain adequate margins (see page 17).

Note: *The cost index is a calculated composite index of wages and overall agricultural input costs. It does not divide costs by metric tons produced, so harvest yields do not affect it. The labor component uses Spain's statutory minimum wage as a continuous annual proxy for labor costs rather than observed fruit-sector wages. Spanish export prices during Spain's main export season are used as a proxy for blueberry prices.*
Source: *Eurostat, MAPA, SMI, RaboResearch 2026*

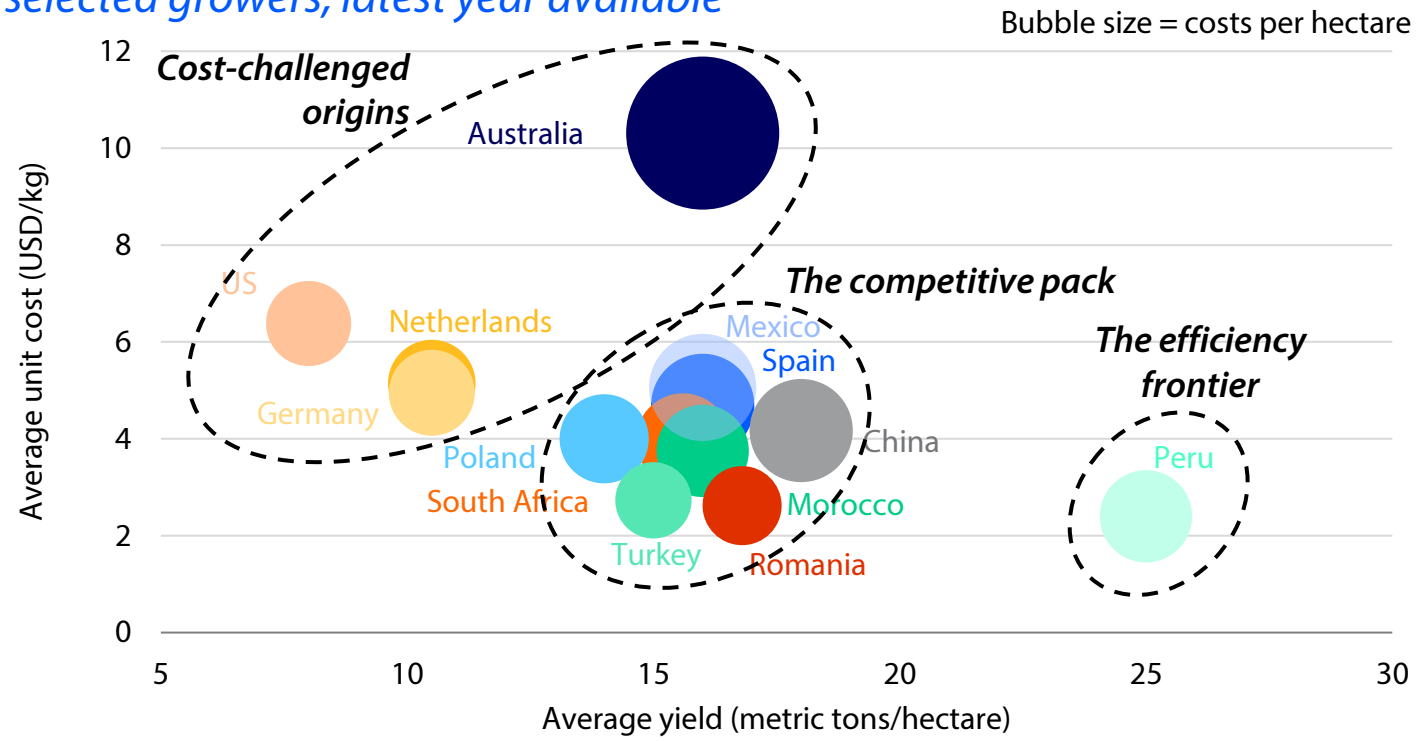
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Wide global variation in production costs

Blueberry growers can pull several levers to reshape their unit cost curves

- As the supply calendar fills and supply volumes and costs rise, we expect further pressure on growers' and exporters' margins. Lowering unit production costs is one of several levers growers can pull to improve margins. Our mapping of indicative blueberry production costs in selected countries (see figure 16) identifies three groups in the global blueberry playing field:
- Cost-challenged origins: Automated harvesting and new, higher-yielding varieties can improve economics. Most producers in this group are close to their markets, which helps keep logistics costs relatively low.
- The competitive pack: These origins remain internationally competitive, but labor costs are rising rapidly in countries such as Poland, Mexico, and Morocco. Maintaining competitiveness requires a focus on quality, yields, and incremental improvements in labor productivity to avoid joining the cost-challenged group.
- The efficiency frontier: These origins lead on yields or unit-cost efficiency. In Peru, low unit costs mainly reflect very high yields. Margin improvements may be easier to achieve after harvest than on the farm, as Peru's post-harvest costs are comparatively high for an origin dependent on overseas exports. Our comparison excludes logistics costs.

*Figure 16: Estimated blueberry production costs for selected countries and selected growers, latest year available**

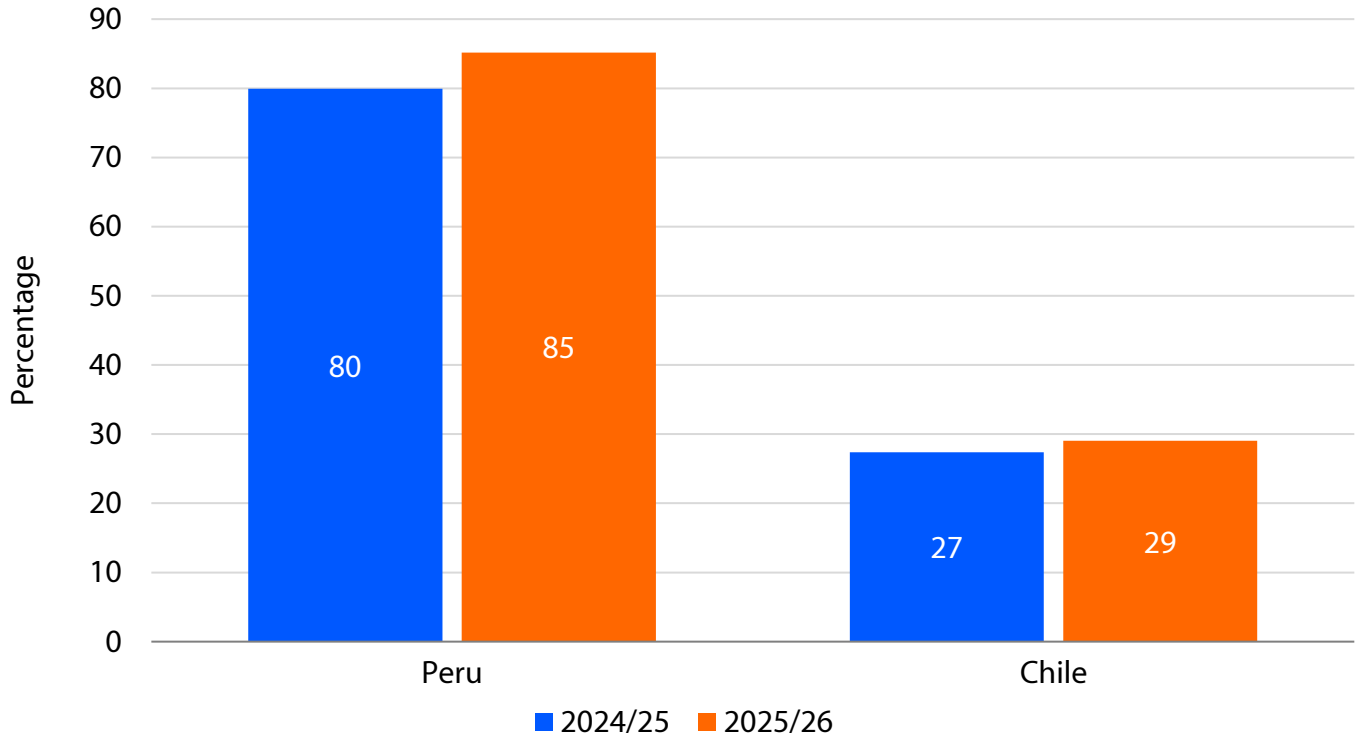


*Note: *These estimates illustrate differences between selected growers in selected countries. Individual companies' unit production costs can vary widely depending on their business models and calculation methods.*
***Source:** RaboResearch 2026, based on industry estimates of representative unit production costs in each country, 2026*

Returns depend on variety-market fit

Successful varieties must align grower economics, supply-chain performance, and consumer expectations

Figure 17: Share of proprietary varieties in Peruvian and Chilean exports, 2024/25-2025/26



Source: *Chilean Blueberry Committee, Proarándanos, RaboResearch 2026*

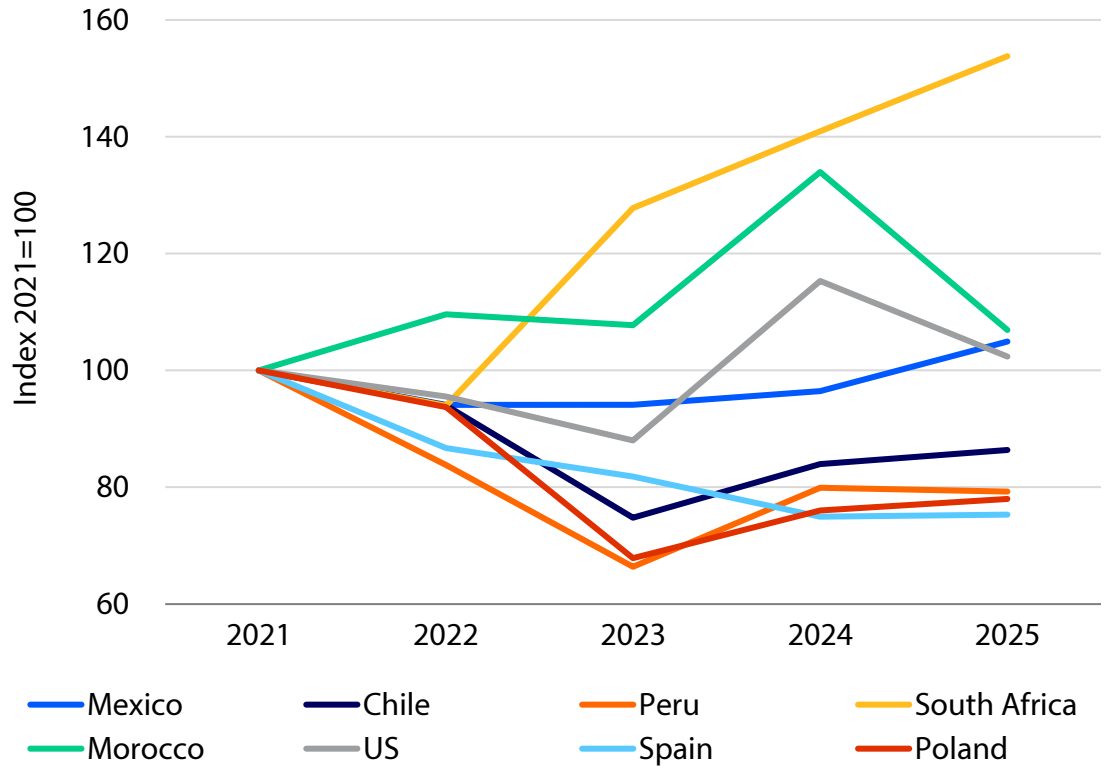
- Proprietary-variety adoption is increasing rapidly, particularly in Peru, as growers and exporters seek improvements in marketable yield, harvest efficiency, fruit quality, and postharvest performance (see figure 17). Commercially successful cultivars must improve grower economics while maintaining quality through the supply chain and delivering a consistent eating experience.
- However, proprietary status does not guarantee superior returns. Performance depends on local growing conditions, agronomic management, harvest requirements, licensing costs, and fit with the target market.
- As access to new genetics expands, advantage will depend less on adoption alone and more on selecting the right variety for the target market and optimizing its production to deliver the strongest returns.

Yield performance is diverging across origins

Productivity gains matter only when they translate into marketable fruit and stronger unit economics

- Yield performance has diverged across origins since 2021, reflecting differences in weather, orchard maturity, varietal transition, production systems, and agronomic execution. South Africa recorded the clearest increase, while yields in several major origins remained volatile or below their 2021 levels, according to figures from the International Blueberry Organization (IBO) (see figure 18).
- Higher yields can improve unit economics by spreading establishment costs, as well as irrigation, management, and other costs across more fruit. However, total yield creates the most value when fruit meets market requirements and can be harvested, packed, and delivered efficiently.
- Competitiveness therefore depends on marketable returns per hectare, not yield alone. Varietal renewal could support productivity and packout, but outcomes will vary with local conditions, orchard maturity, agronomy, harvest requirements, and target market.
- Current adoption of proprietary cultivars is expected to support improvements in average yields in several origins over the next few seasons (see figure 18).

Figure 18: Evolution of average yields in selected countries, 2021-2025



Source: IBO, RaboResearch 2026

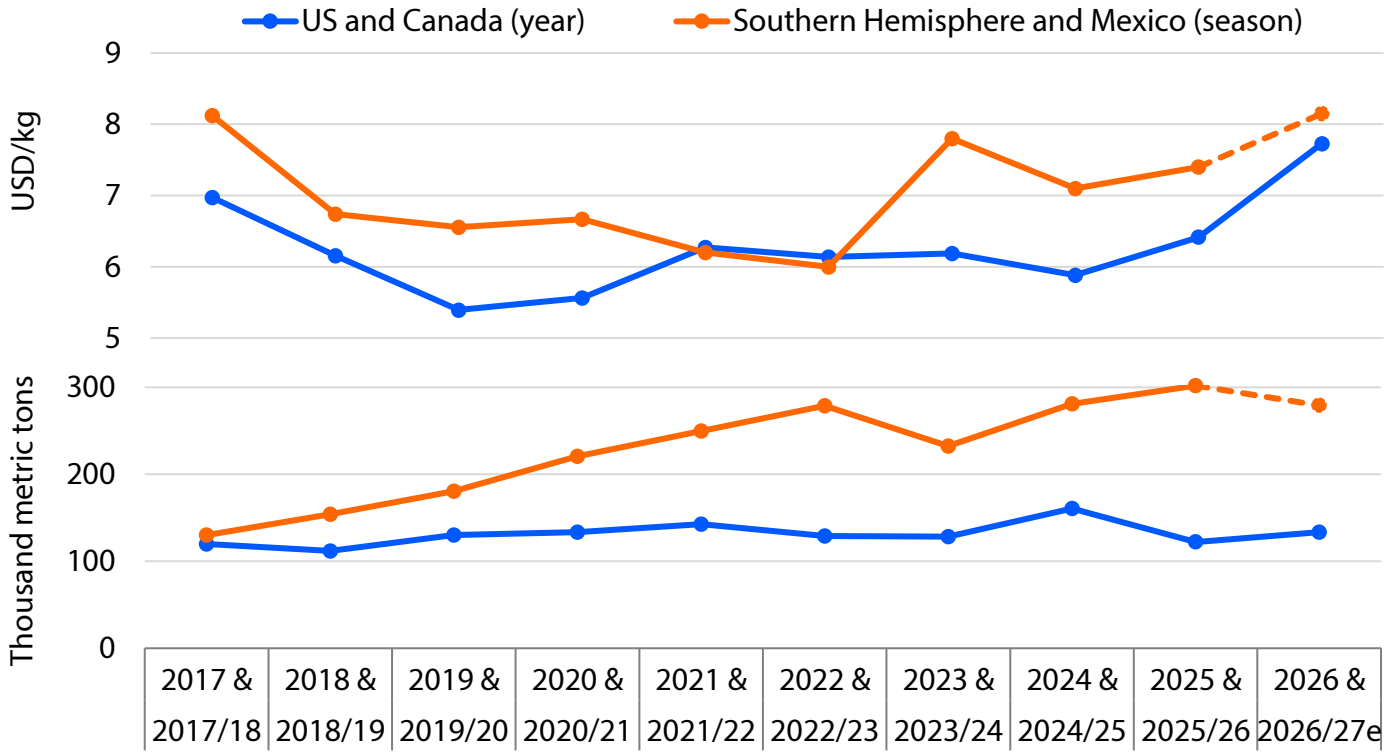
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Quality can sustain prices in a growing market

Higher supply and firmer prices can coexist, but average outcomes conceal important differences

- In 2025/26, Southern Hemisphere and Mexican supply to the US increased by about 7%, while the average price rose by approximately 4% (see figure 19). This shows that higher aggregate supply does not necessarily result in lower average prices.
- Several factors may have contributed, including resilient demand, tighter competing supply in particular weeks, changes in origin and seasonal mix, and improvements in fruit quality and arrival condition. The chart does not isolate the effect of any one factor.
- Volume alone is therefore an incomplete measure of market performance. Consistent fruit quality can support price realization and repeat purchases, but nominal price resilience does not necessarily imply stronger margins when production and supply-chain costs are also rising.

Figure 19: Fresh blueberry prices and volumes in the US by supplying region, 2017-2026/27e



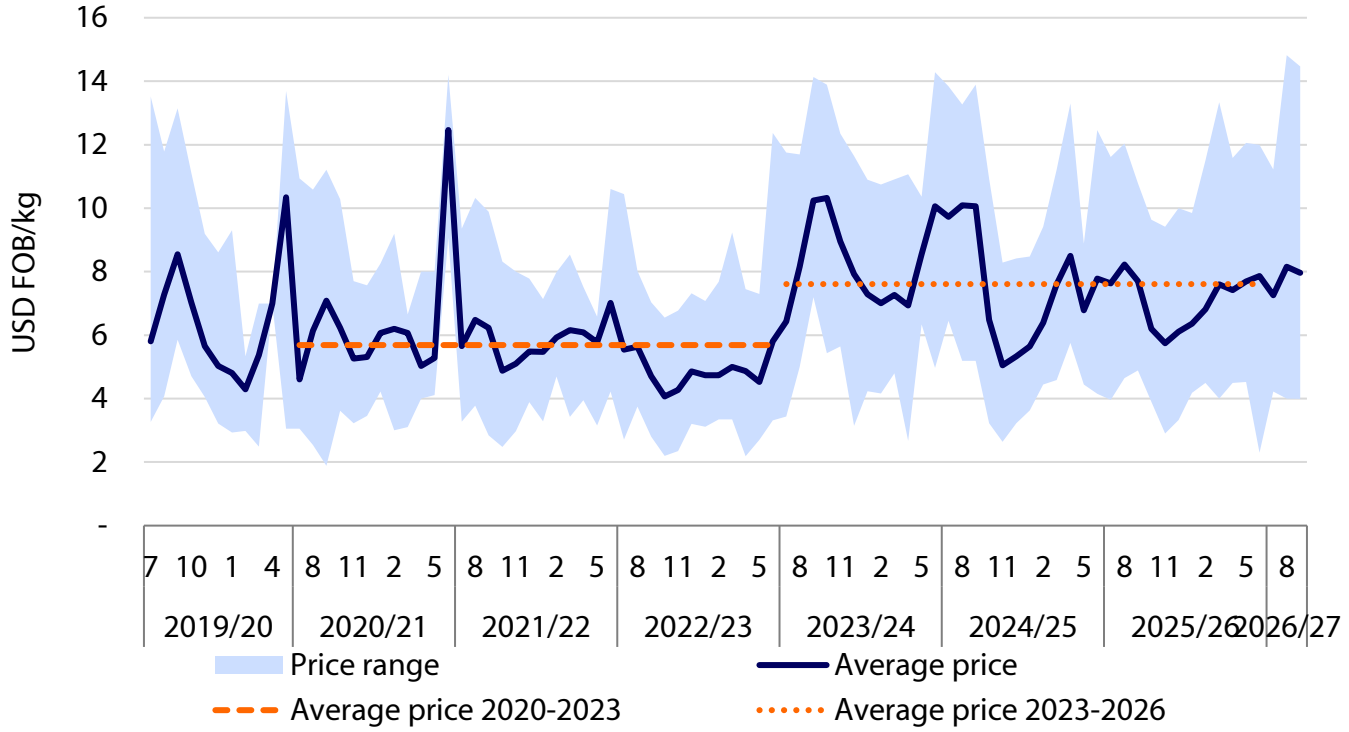
Note: *The upper y-axis does not start at zero to better show the price difference. Prices are nominal and have not been adjusted for inflation. Data for 2026/27 are estimated. Prices of conventional blueberries only.*
Source: *Chile Customs, Mexico Customs, SENASA, USDA AMS, RaboResearch 2026*

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The price range widens as quality differentiates

Average prices increasingly conceal the gap between lower- and higher-priced transactions

Figure 20: FOB prices for Peruvian fresh blueberry exports to the US, 2020/21-2026/27



Note: The price range represents the interval between the 5th and 95th percentiles of transaction-level FOB prices for each month.
Source: Peru Customs, RaboResearch 2026

- The range between lower- and higher-priced Peruvian export transactions has generally widened in recent seasons, while average prices have also increased. This pattern is consistent with a more differentiated market, although timing, destination, certification, customer mix, and contract terms may also contribute to price dispersion (see figure 20).
- Average prices therefore provide an increasingly incomplete view of commercial performance. Returns depend not only on the season or month of sale, but also on the fruit's variety, size, quality, condition, certification, and target market.
- Looking ahead, greater availability of differentiated premium fruit could extend the upper end of the price range, while abundant conventional supply continues to constrain the lower end. Capturing the upside will require consistent quality and clear market positioning rather than access to new genetics alone.

One category, different consumer promises

The right fruit proposition depends on the consumer, occasion, format, and price point

Blueberries are an increasingly segmented category as consumers and customers seek different combinations of value, quality, convenience, and functionality. Each segment places different weight on fruit traits, packaging formats, service requirements, and price. Capturing value will depend on building a coherent proposition around the intended market and occasion, rather than assuming that one fruit specification can optimize returns across every channel.

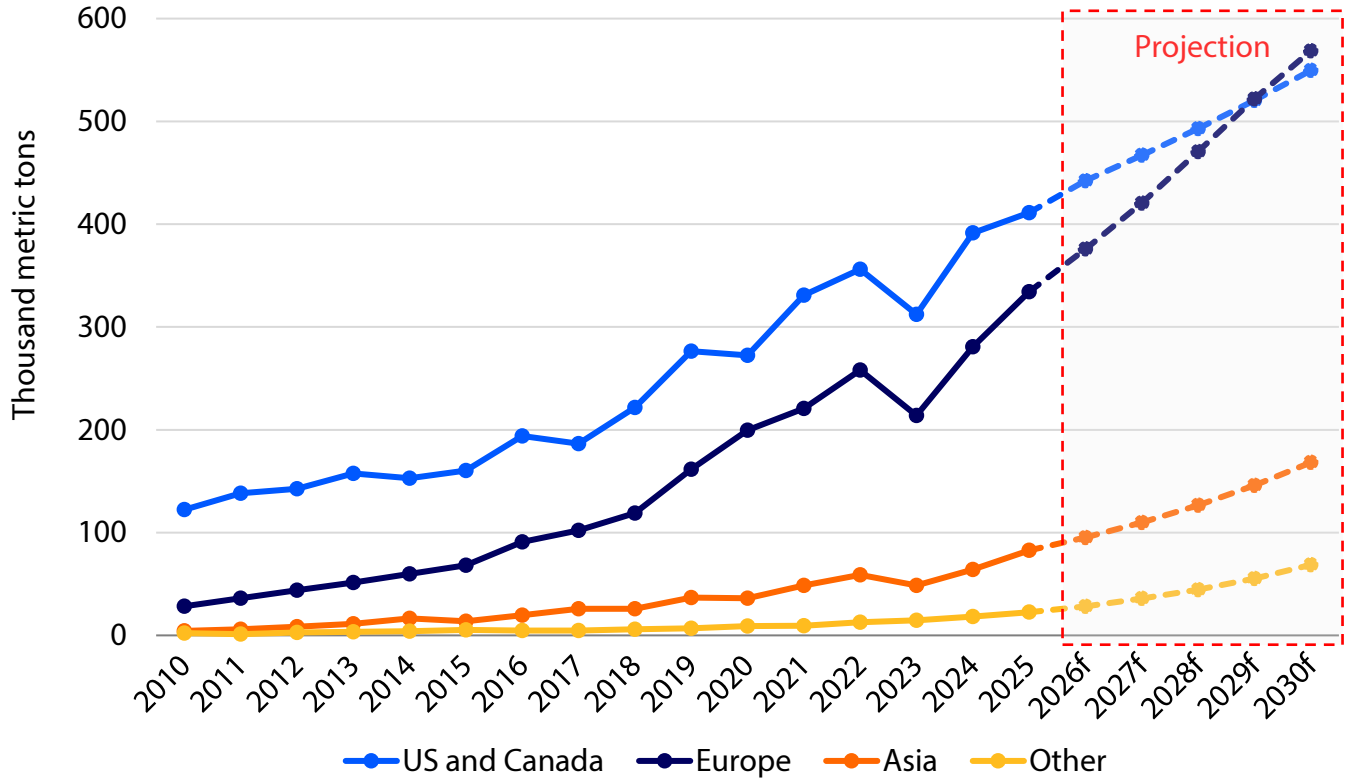
Segment	*Consumer promise*	*Priority fruit traits*	*Packaging format*	*Commercial requirement*
Everyday value	Reliable quality at an accessible price	Consistent eating quality	Family or value pack	Competitive delivered cost
Premium snack	A clearly superior eating experience	Large, crisp, flavorful, visually appealing	Premium pack	Repeat purchase and a sustained premium
On-the-go convenience	An easy, healthy snack	Uniform, ready-to-eat	Snack or portion pack	Format premium with low waste
Foodservice and processing	Reliable performance for the intended use	Fit for foodservice and processing applications	Bulk or frozen	Consistent specifications and processing efficiency

Source: *RaboResearch 2026*

Global demand is becoming more diversified

North America and Europe remain the largest markets, while Asia and other regions grow faster

Figure 21: Global blueberry imports, 2010-2030f



Note: *EU imports comprise shipments from non-EU countries only, excluding reexports to avoid double-counting.*
Source: *USDA AMS, HM Revenue & Customs, Eurostat, Trade Map, RaboResearch 2026*

- Global fresh blueberry imports are expected to continue growing across all major regions. North America and Europe will remain the largest destination markets, supported by established retail programs, year-round availability, and broad consumer familiarity (see figure 21). The regional mix is nevertheless shifting. The combined US and Canada share of global imports is projected to decline from about 48% in 2025 to 41% by 2030, even as import volumes continue to rise. Europe could overtake the US and Canada as the largest importing region by the end of the decade, while Asia and other markets increase their combined share from approximately 12% to 17%.
- A more diversified demand base creates additional options for exporters and reduces reliance on a single destination. Capturing growth outside established markets will require selective investment in market access, distribution, and consumer awareness, combined with affordable price points and consistent eating quality.

Future growth depends on value and repeat purchases

Absorbing future supply will require consistent quality, accessible price points, and more buying occasions

- Blueberries have been the fastest-growing major fresh-fruit category in the US in terms of per capita availability (see figure 23), supported by year-round supply, wider retail availability, and a strong health proposition. Retail momentum remains positive: Fresh and frozen blueberry sales reached a record USD 3.8bn in 2025, with fresh-blueberry dollar sales growing considerably faster than the overall produce category. Despite this growth, per capita availability remains relatively low compared with established fruits (see figure 22). This leaves meaningful headroom, but the next phase will need to come from more households buying blueberries, more frequent purchases, and a broader range of eating occasions rather than availability alone.
- Consumers already recognize blueberries' health credentials, but value and eating quality remain central to purchase decisions. Recent research estimates US blueberry demand elasticity at –0.96, suggesting that sustained price increases could lead to a broadly proportional decline in purchase volumes. Absorbing future supply will therefore require more than competitive pricing: Consistent flavor and freshness, convenient packaging formats, larger value packs, and deeper household penetration will be critical to encouraging more frequent purchases.

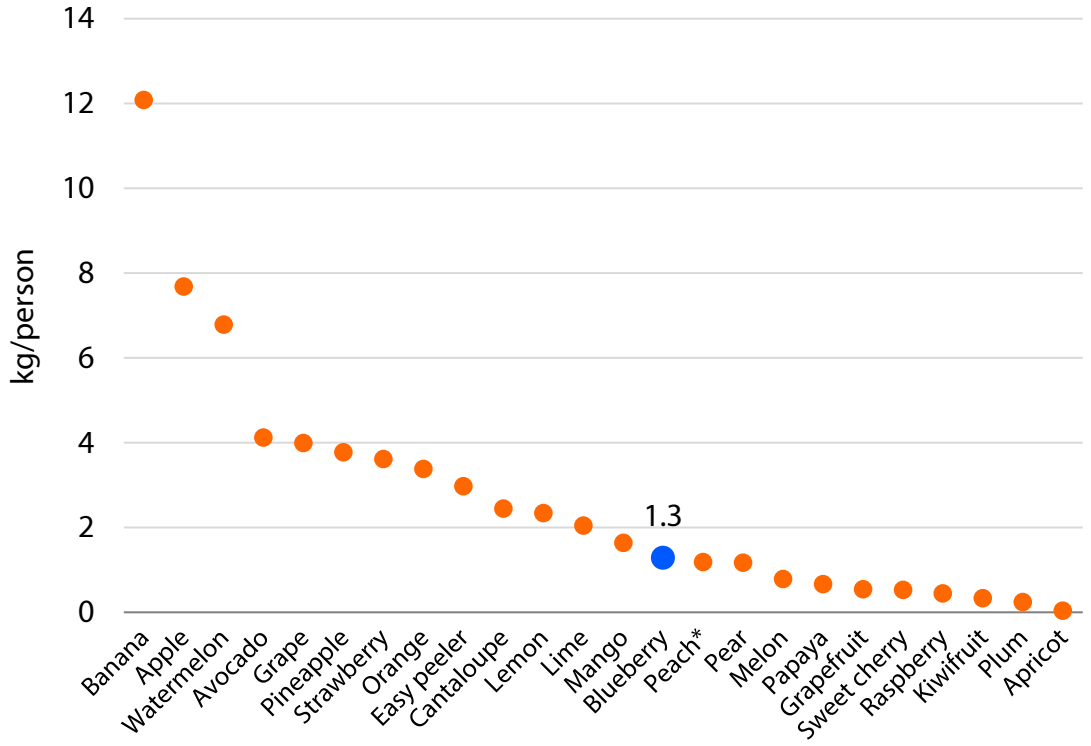
Growth is global, but demand must be developed

- North America will remain a major blueberry market, but Europe, Asia, and other regions are expected to grow faster. Europe could close the import gap with North America by the end of the decade, while Asia offers additional opportunities for diversification. This shift increases the importance of customer relationships, distribution capabilities, and market access across several regions.
- Low per capita availability in the EU-27 and China points to considerable headroom (see figure 24), but potential does not automatically translate into demand. Growth will require market-specific strategies that combine consistent eating quality with suitable price points, packaging formats, promotion, and consumption occasions. Success will depend on translating greater availability into household penetration and repeat purchases.

Blueberry availability has outperformed in the US

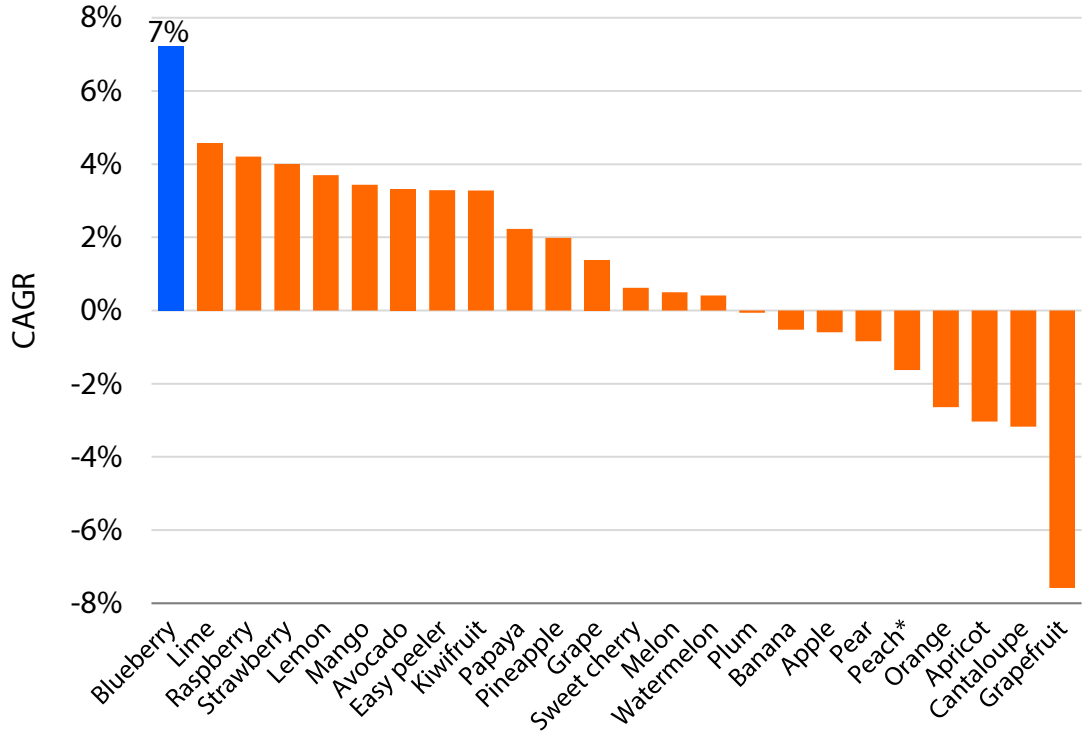
Next-phase growth hinges on more households, more occasions, and higher frequency

Figure 22: Fresh fruit availability in the US, average 2022/23-2024/25



*Note: Includes nectarines
Source: USDA, RaboResearch 2026

Figure 23: Change in fresh fruit availability in the US, average 2013/14-15/16 vs. average 2022/23-24/25



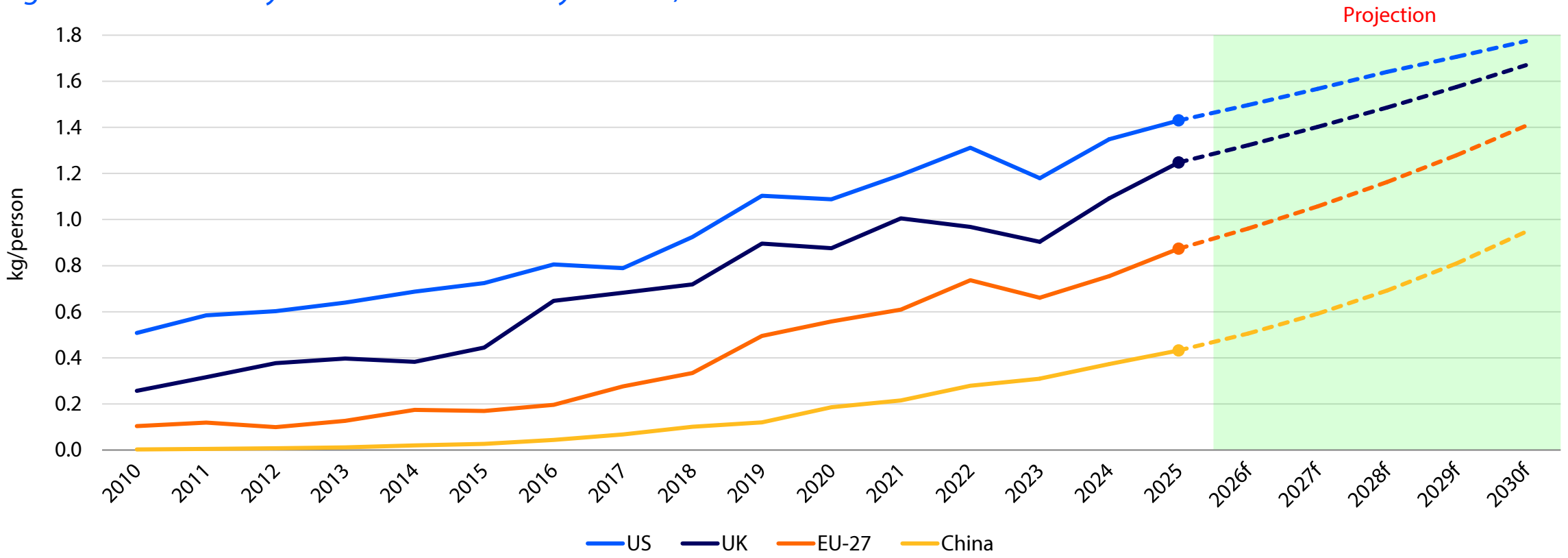
*Note: Includes nectarines
Source: USDA, RaboResearch 2026

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Blueberry availability is continuing to rise

Fresh blueberry availability per person will increase but will still vary widely across major markets

Figure 24: Availability of fresh blueberries by market, 2010-2030f

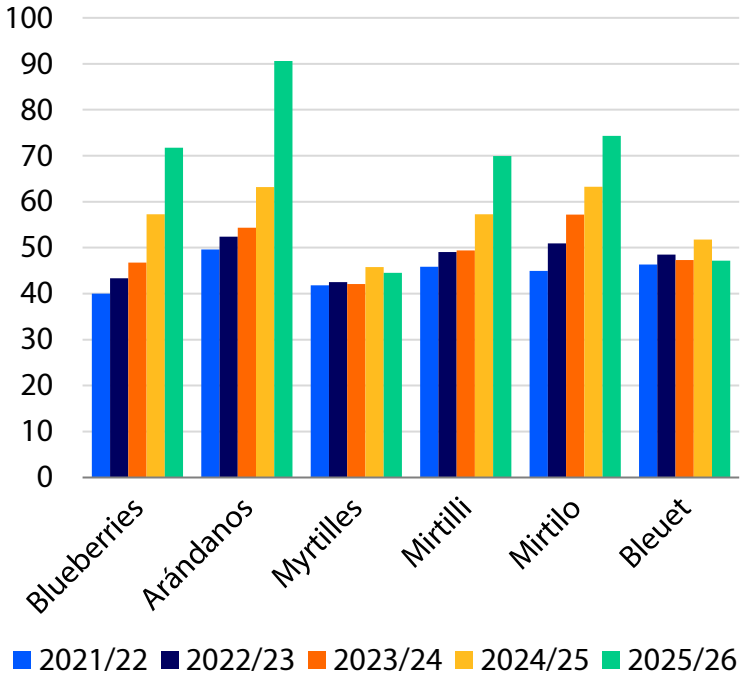


Note: *Availability is calculated as production + imports – exports divided by the market's total population.*
Source: *FAO, USDA AMS, HM Revenue & Customs, Eurostat, Trade Map, RaboResearch 2026*

Online interest in blueberries is growing

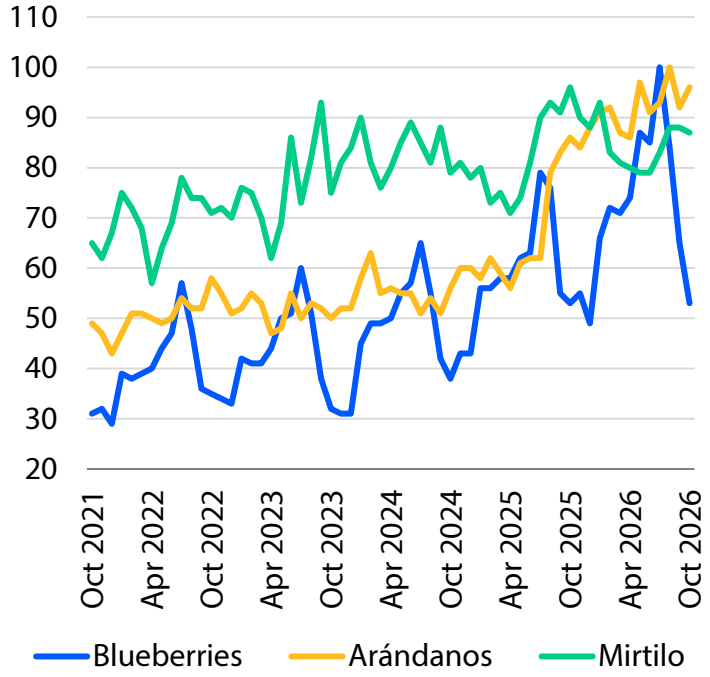
Rapidly rising blueberry searches in Spanish- and Portuguese-language markets may signal untapped market opportunities

Figure 25: Average annual Google search interest in blueberries in selected language markets, 2021-2026



Note: *The year spans October-September. Search interest is relative to the peak in the selected five-year period.*
Source: *Google Trends, RaboResearch 2026*

Figure 26: Monthly Google search interest in blueberries in selected language markets, 2021-2026



Note: *Search interest is relative to the peak in the selected five-year period.*
Source: *Google Trends, RaboResearch 2026*

- Google search interest reflects awareness or curiosity about blueberries but does not directly measure consumption growth. Interest is rising steadily in English-, Spanish-, Portuguese-, and Italian speaking markets (see figure 25), while interest in French-speaking markets has yet to take off. This matches household consumption data for France, the largest French-speaking economy. Estimated apparent consumption is 0.2kg per capita in France versus 0.8kg in the EU-27. In French-speaking Canada, interest in blueberries ("bleuet") is likely very mature given Canada's long history in blueberry production.
- Spanish-language interest has grown rapidly and is less seasonal than interest in English, French, and Italian. As several Spanish-speaking markets are large blueberry producers and exporters, this may indicate opportunities for higher domestic consumption and regional exports.
- Despite year-round availability in most countries, consumer interest appears to peak during the blueberry season, especially in English-speaking markets such as North America (see figure 26).

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A summary of the methodologies used by Rabobank can be found on our website.

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