Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

Canada

Market Access Secretariat
Global Analysis Report

Blueberries
in the European Union

March 2016

EXECUTIVE SUMMARY

The market for fresh blueberries in the European Union (EU) is demonstrating strong growth in terms of imported products over the last five years experiencing a compound annual growth rate (CAGR) of 21.5% from 2010-14. Alongside rising disposable incomes and health consciousness, the appeal of fresh blueberries is quickly gaining ground.

In 2014, the EU imported US$285.3 million of fresh blueberries from the world, which was US$152.6 million more than the value recorded in 2010, representing significant growth. Although fresh blueberry imports are on the rise and gaining market share, frozen blueberries still accounted for over 60% of total EU blueberry imports from the world with a value of US$431.5 million.

Inter-EU trade of fresh and frozen blueberries in 2014 were US$400.9 million and US$836.7 million, respectively. Both fresh and frozen blueberries experience an increase in growth from 2010-14 with CAGR's of 20.4% and 6.9%, respectively.

Canada was the eight-largest non-EU supplier of fresh blueberries with imports valued at US$2.6 million and the largest non-EU supplier of frozen blueberries with imports valued at US$68.6 million to the EU in 2014.

The European market saw the launch of 4,315 new products containing blueberries within the 2011-2014 calendar years. An additional 682 products with blueberries have already been launched within the first eight months of 2015 across multiple product categories.

The EU has a number of product specification standards for quality, packaging and labelling that need to be met prior to importing fresh or frozen blueberries into the country.

CONTENTS

Visit our online library of public reports for more information on this and other markets.

Growing Forward 2

Canada

TRADE OVERVIEW

European Union Performance

External European Union Trade

The European Union (EU) is the second-largest importer, after the United States (U.S), of fresh blueberries in the world. Their imports of fresh blueberries have seen steady growth over the last five years reaching a value of US$282.3 million in 2014. EU imports of fresh blueberries increased by a compound annual growth rate (CAGR) of 21.5% from 2010-14. In 2014, EU imports of fresh blueberries came from only 30 countries signifying a very concentrated pool of suppliers. The top non-EU supplier countries in 2014 were Chile with US$134.2 million or 47.5% of the market share, followed by Argentina with US$54.8 million (19.4%), and Morocco with US$38.4 million (13.6%). Canada ranked as the EU's eight-largest supplier of fresh blueberries with US$2.6 million or 0.9% market share (Global Trade Atlas, 2015).

EU Imports of Fresh Blueberries* from Top Ten Non-EU Supplying Countries, US$ Millions

Country		2010	2011	2012	2013	2014	CAGR % 2010-14
EU Total Fresh Blueberries		**129.67**	**166.74**	**188.09**	**206.88**	**282.30**	**21.47**
1	Chile	51.62	62.68	82.61	96.00	134.18	26.98
2	Argentina	39.05	46.96	48.53	39.67	54.84	8.86
3	Morocco	9.53	15.66	20.02	24.28	38.46	41.76
4	South Africa	6.11	8.53	10.20	13.75	18.42	31.75
5	Peru	0.03	0.07	0.51	6.18	12.39	351.85
6	Uruguay	10.10	11.44	10.65	10.66	10.00	-0.25
7	United States	5.84	5.57	6.46	7.09	4.73	-5.13
8	Canada	0.89	3.57	1.55	2.40	2.63	31.27
9	Mexico	0.08	0.03	1.02	0.86	2.19	127.03
10	Macedonia	0.55	0.41	0.17	0.52	1.10	18.80

Source: *Global Trade Atlas, 2015* ***CAGR:*** *Compound Annual Growth Rate*
Note: *For the purposes of this report, the following HS code was used to define "fresh blueberries:" 081040. This includes fresh cranberries as EU import data does not distinguish blueberries from cranberries.*

In terms of imports of frozen fruit and nuts, which include blueberries, the EU was again the second-largest importer in the world with $431.5 million, edged out slightly by the U.S. for the top spot. Their supplier list is diversified with imports coming from 68 countries. The EU's imports of frozen fruit and nuts have experienced some fluctuation since 2011 where they peaked at over US$553.6 million. However, since then, there has been a constant decline in imports which saw a decrease of 11.6% in 2014 over 2013 falling to just over US$431.4 million. Although the EU is experiencing a decline in their imports of frozen fruit and nuts, Canada is still their top supplier and has been since 2011, with imports of US$68.6 million or a market share of 15.9% in 2014. Other top non-EU suppliers of frozen fruit and nuts were Serbia in second with imports valued at US$63.2 million, followed by Ukraine (US$50.2 million), China ($35.6 million), and Chile (US$21.9 million). In 2014, the top five non-EU suppliers combined accounted for over 55% of the available market share (Global Trade Atlas, 2015).

EU Imports of Frozen Blueberries* from Top Ten Non-EU Supplying Countries, US$ Millions

Country		2010	2011	2012	2013	2014	CAGR % 2010-14
EU Total Frozen Blueberries		**382.30**	**553.59**	**492.92**	**488.23**	**431.46**	**3.07**
1	Canada	51.87	87.80	94.55	81.50	68.59	7.23
2	Serbia	60.37	82.99	71.89	77.87	63.18	1.15
3	Ukraine	52.34	67.38	51.30	46.01	50.20	-1.04
4	China	41.41	46.54	42.86	51.67	35.57	-3.73
5	Chile	9.80	20.24	21.14	24.57	21.91	22.28
6	Russia	10.61	35.70	23.86	17.32	21.20	18.90
7	Peru	10.33	13.54	17.73	14.68	17.40	13.92
8	Turkey	23.89	23.50	26.81	20.89	15.36	-10.46
9	India	7.37	10.64	11.02	11.89	14.14	17.71
10	Israel	7.56	6.59	9.39	11.38	14.12	16.92

Source: *Global Trade Atlas, 2015* ***CAGR:*** *Compound Annual Growth Rate*

****Note:*** *For the purposes of this report, the following HS code was used to define "frozen blueberries:" 081190. This includes all frozen fruit as EU import data does not distinguish blueberries from other fruits.*

Inter-European Union Trade

**This section will focus on inter-European Union (EU) trade for fresh and frozen blueberries. It is important to note that the numbers in this section have the possibility of over representing the industry due to imports being double counted. This can occur when a product is imported into a hub country— who initially records the imports— then the hub country send the product to another country who then also records the product as an import.*

In 2014, inter-EU trade for fresh blueberries was valued at just over US$400.0 million which was an increase of almost US$150.0 million over 2013 alone. Over the 2010-14 period fresh blueberries grew by a compound annual growth rate (CAGR) of 20.4%. The top three inter-EU importing countries were the United Kingdom with 20.8% of total imports, followed by Germany with 17.2%, and the Netherlands with 13.7%. These three countries combined accounted for 51.8% of all inter-EU trade imports (Global Trade Atlas, 2015).

EU Imports of Fresh Blueberries* from Top Ten Inter-EU Supplying Countries, US$ Millions

Country		2010	2011	2012	2013	2014	CAGR % 2010-14
Total Fresh Blueberries		**191.01**	**258.11**	**290.61**	**354.85**	**400.92**	**20.37**
1	United Kingdom	60.26	85.57	96.30	90.01	83.47	8.48
2	Germany	26.04	40.68	41.88	62.99	68.97	27.57
3	Netherlands	17.25	23.93	23.95	25.80	55.09	33.69
4	Italy	11.98	16.63	16.21	17.79	18.88	12.04
5	Lithuania	2.70	6.49	10.08	16.54	14.80	53.01
6	Belgium	6.65	8.70	11.60	15.43	19.07	30.15
7	France	6.30	9.91	10.49	14.70	15.82	25.90
8	Denmark	11.58	13.70	15.90	14.12	17.77	11.31
9	Sweden	5.88	9.24	10.67	11.71	15.88	28.20
10	Austria	4.30	5.36	4.20	10.41	7.34	14.32

Source: *Global Trade Atlas, 2015* ***CAGR:*** *Compound Annual Growth Rate*

****Note:*** *For the purposes of this report, the following HS code was used to define "fresh blueberries:" 081040. This includes fresh cranberries as EU import data does not distinguish blueberries from cranberries.*

Inter-EU trade of frozen blueberries was over double that of fresh blueberries each year from 2010-14, although frozen blueberries experienced a decline in imports of US$38.2 million from 2013-14. This decline could be a result of the increasing consumption trend towards fresh blueberries happening in the EU. The top three inter-EU importing countries in 2014 were Germany with 19.8% of total imports, followed by France with 13.1%, and Italy with 6.3%. In addition, the top five inter-EU countries combined accounted for over 50% of the total market (Global Trade Atlas, 2015).

EU Imports of Frozen Blueberries* from Top Ten Inter-EU Supplying Countries, US$ Millions

Country		2010	2011	2012	2013	2014	CAGR % 2010-14
EU Total Frozen Blueberries		**641.61**	**805.57**	**911.06**	**874.92**	**836.70**	**6.86**
1	Germany	139.58	171.17	183.65	176.01	165.33	4.32
2	France	79.26	82.21	89.78	107.67	109.95	8.53
3	Italy	32.34	48.06	46.92	48.49	52.90	13.09
4	Belgium	38.31	50.26	57.04	56.34	51.26	7.55
5	Netherlands	42.00	55.20	58.25	47.40	40.99	-0.61
6	Sweden	33.12	39.59	38.77	41.18	35.06	1.43
7	United Kingdom	34.78	35.63	38.53	39.67	39.62	3.31
8	Austria	32.14	39.68	34.72	38.46	33.22	0.83
9	Poland	18.87	28.97	30.78	27.30	32.08	14.19
10	Finland	9.85	23.50	28.18	24.70	14.10	9.38

Source: *Global Trade Atlas, 2015* ***CAGR:*** *Compound Annual Growth Rate*
****Note:*** *For the purposes of this report, the following HS code was used to define "frozen blueberries:" 081190. This includes all frozen fruit as EU import data does not distinguish blueberries from other fruits.*

According to the Food and Agriculture Organization of the United Nations (FAOSTAT), in 2013 the European Union's (EU) production quantity for blueberries was 52,276 tonnes, while they imported over 263,000 tonnes of blueberries and exporting 85,460 tonnes in 2013 (Global Trade Atlas, 2015). This means that, in 2013, the EU consumed roughly 229,830 tonnes of blueberries. The top five EU blueberry producing countries in 2013 were Poland with 12,731 tonnes, followed by Germany (10,277 tonnes), France (9,011 tonnes), the Netherlands (5,498 tonnes), and Spain (5,000 tonnes). These five countries combined accounted for over 81% of the EU's blueberry production (FAOSTAT, 2015). However, these countries are not producing enough blueberries to fully meet the demands of EU consumers, resulting in an increasing demand for imports from external EU countries.

Canadian Performance

**This section will focus on Canada's exports of fresh and frozen blueberries to the EU as Canadian export data records export values specifically for blueberries. As there are two different reporting sources used to gather EU imports (Eurostat) and Canada's (Stats Canada) exports there will be differences in values.*

In 2014, Canada exported US$343.3 million worth of fresh and frozen blueberries to the world, with 68.2% going to the United States. The European Union (EU) was Canada's second-largest export destination, albeit with a significantly smaller proportion, receiving just 17.1% or US$58.8 million of fresh and frozen blueberries exports, followed by Japan (7.9%). The top three EU countries that Canada exported fresh and frozen blueberries to were Germany which received US$23.7 million, the Netherlands (US$12.8 million), and France (US$8.3 million) (Global Trade Atlas, 2015).

The majority (98.9%) of blueberries exports to the EU from Canada were of the frozen variety. Canadian frozen blueberry exports to the EU have experienced some wide fluctuations over the last few years, but still managed to have a compound annual growth rate of 3.8% from 2010-14 (Global Trade Atlas, 2015).

Canadian Exports of Fresh or Frozen Blueberries to the EU, US$ Millions

HS Code	Description	2010	2011	2012	2013	2014	% CAGR 2012-14
Total Fresh and Frozen Blueberries		**51.63**	**88.75**	**87.27**	**59.67**	**58.81**	**3.31**
Total Fresh Blueberries		**0.99**	**2.53**	**0.30**	**1.63**	**0.02**	**-63.38**
08104012	Fresh cultivated (highbush) blueberries	0.10	1.23	0.19	0.04	0.02	-36.07
08104011	Fresh wild (lowbush) blueberries	0.89	1.29	0.11	1.60	0.00	-86.06
Total Frozen Blueberries		**50.64**	**86.23**	**86.97**	**58.03**	**58.79**	**3.80**
08119012	Frozen cultivated (highbush) blueberries	4.34	5.73	5.64	4.39	0.63	-38.25
08119011	Frozen wild (lowbush) blueberries	46.31	80.50	81.33	53.65	58.16	5.86

Source: *Global Trade Atlas, 2015*

Canadian Exports of Fresh or Frozen Blueberries - Top Five EU Destination Countries, US$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
EU Combined Total	**51.63**	**88.75**	**87.27**	**59.67**	**58.81**	**3.31**
Germany	20.38	33.10	33.07	23.94	23.67	3.82
Netherlands	10.75	21.14	18.05	10.78	12.83	4.52
United Kingdom	5.88	12.36	11.94	10.86	8.31	9.05
France	5.12	7.95	13.04	6.07	6.28	5.26
Belgium	5.94	7.03	5.37	3.97	4.14	-8.66

Source: *Global Trade Atlas, 2015*

An important factor that will positively impact Canadian blueberry exporters' competitiveness is the EU is the Canada-European Union Comprehensive Economic and Trade Agreement (CETA) which was concluded in August 2014. Once CETA enters into force, (fresh/dried/sweetened/frozen) berries will see a 3.2% reduction in tariffs and will become duty-free. For more information on CETA, please visit the following website: Canada-European Union Comprehensive Economic and Trade Agreement (CETA).

BLUEBERRIES IN THE EUROPEAN UNION

Blueberries in particular are native to North America and were only introduced into Europe in the 19th century (BDN Maine, 2014). Blueberries can be categorized into one of two varieties: wild (lowbush) or cultivated (highbush). The wild (lowbush) blueberry is one of just three commercially grown fruit crops native to North America; the others being cranberries and Concord (American) grapes (BDN Maine, 2014).

Canada is one of the world's largest producers of wild (lowbush) blueberries, which are mainly used for processing and freezing, and is also a producer of cultivated (highbush) blueberries, which are usually sold fresh because they are less perishable then their counterpart (AAFC, 2011). According to the Food and Agriculture Organization of the United Nations (FAOSTAT), in 2013 the top three producing countries of blueberries were the United States (239,071 tonnes), followed by Canada (109,007 tonnes) and the European Union (52,276 tonnes).

Wild (lowbush) blueberries have the highest antioxidant capacity per serving out of any widely available cultivated fruits. United States Drug Administration (USDA) researchers found that a one-cup serving of wild blueberries (85 calories) had more total antioxidant capacity than a serving of cranberries, strawberries, plums, raspberries and even cultivated high bush blueberries (BDN Maine, 2014).

Blueberries are known as a “superfruit” because they possess certain characteristics that make them superior to other types of fruits such as strawberries and raspberries. These characteristics include a long shelf life, convenient, durable because they are not “squish prone” like strawberries and raspberries, along with only needing minimal preparation—only washed—prior to consumption. Although blueberries have achieved “superfruit” status, the price factor is stopping consumers from considering them as an everyday fruit snack and they are only being viewed as a “treat”. This consumer view is expected to reverse once blueberry production ramps up sufficiently to meet demand (Euromonitor International, 2014).

In terms of the EU, experts are predicting that demand and consumption of blueberries will see a significant increase over the coming years as consumers begin to see the health benefits and improvements in the quality and taste of blueberries (EUROFRUIT, 2014). The appeal of blueberries to health-conscious consumers is tied to their extremely rich antioxidants properties, low calorie intake, high in fibre and nutrient content, and that blueberries may contribute to heart health since they appear to act as an anti-inflammatory and may also reduce blood cholesterol levels (AAFC, 2011). A trend in the EU also affecting demand, in particular in the United Kingdom (UK) is the switch from blueberries being seen as seasonal to being viewed as a year-round fruit (EUROFRUIT, 2014). Euromonitor is predicting that fresh blueberry consumption in Western Europe is going to increase by a further 25% between 2015 and 2019, resulting in an increasing demand (Euromonitor International, 2014).

According to Euromonitor, in 2014, blueberries delivered double-digit volume growth in a number of Western European markets, including Switzerland, Finland, the Netherlands, Denmark, Germany, Norway, Sweden, the UK and Ireland. In order to meet European demands for blueberries, imports from opposite hemispheres are needed to keep a stable supply throughout the year (Euromonitor International, 2014).

Of all the EU countries, the UK, despite already having a considerable blueberry market (the 10th-largest globally), is expected to grow in volume by 76% through 2018. This substantial growth will be driven by the UK consumers’ high level of openness to the “superfruit” message and the all-important factor of convenience. While the UK’s volume consumption of blueberries continues to grow, there are a number of EU countries, such as Spain, France and Italy, whose volume sales are still on the low side (Euromonitor International, 2014). Canadian exporters could potentially take advantage of this by increasing their exports to these countries.

NEW PRODUCT ANALYSIS

According to the Mintel Global New Products Database, there were 4,997 new food and drink product launches in the European Union market containing blueberries between January 2011 and August 2015.

Germany, France and the United Kingdom were the most popular countries for products to be launched in over the January 2011 to August 2015 period and saw 45.5% of the total launches. Almost half (44.7%) of the launches were completely new products and 38.2% were new varieties or range extensions. The most commonly used claim was “no additives or preservatives,” which appeared on 22% of the total launches, followed by “organic” with 15.8% and “ethical – environmentally friendly packaging” with 15.2%. Approximately 13% of the total launches were in the spoonable yogurt product subcategory and 7.3% were confiture and fruit spreads. Over half of the product launches fell within the US$0.12-US$4.38 price range.

Number of New Product Launches Containing blueberries in the EU*, by Year and Feature

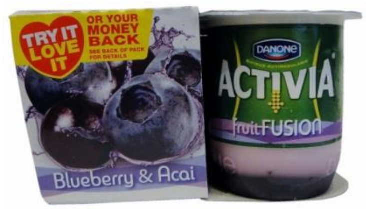
Feature**	2011	2012	2013	2014**	August 2015
Total launches	**1,099**	**1,285**	**1,017**	**914**	**682**
Top 5 countries					
Germany	174	221	177	157	134
France	82	126	113	119	84
United Kingdom	184	322	168	102	107
Italy	101	97	86	60	65
Poland	51	38	45	60	23
Top 3 launch types					
New variety/range extension	385	483	375	389	275
New product	586	588	438	348	274
New packaging	91	184	132	132	90
Top 5 claims					
No additives/preservatives	279	257	237	188	140
Ethical: environmentally friendly packaging	154	146	168	166	124
Organic	203	157	147	148	136
Low/no/reduced allergen	133	133	130	123	107
Gluten-free	104	73	102	96	86
Top 5 subcategories					
Spoonable yogurt	150	148	132	122	80
Tea	61	19	61	56	32
Juice	51	56	38	54	40
Confiture and fruit spreads	110	119	59	47	31
Dairy-based frozen products	53	33	46	40	37
Top 5 companies					
Lidl	15	30	34	41	21
Danone	32	35	28	23	14
Marks & Spencer	4	23	17	23	12
Nestlé	12	19	11	17	10
Unilever	14	13	27	16	10
Price range in US dollars					
$0.15 - $2.26	167	238	361	348	256
$2.27 - $4.38	240	254	305	322	227
$4.39 - $6.50	66	81	113	141	97

***Note:** *EU includes all but the following countries Bulgaria, Cyprus, Estonia, Latvia, Lithuania, Luxembourg, Malta, and Slovenia because data is not collect from these countries.*

****Note:** *The features analyzed above were ranked based on 2014 data.*

NEW PRODUCT EXAMPLES, 2015

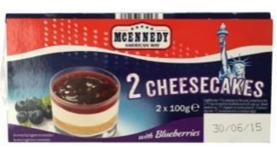
Blueberry Acai Yogurt



Company: Danone
Brand: Danone Activia Fruit Fusion
Subcategory: Dairy
Launch type: New product
Price in US$: 3.35
Claims: Vegetarian, ethical - environmentally friendly package, social media

Description: Danone Activia Fruit Fusion Blueberry & Acai Yogurt comprises a layer of mouth-watering fruit combinations topped with creamy yogurt. This vegetarian product contains Bifidus ActiRegularis, a unique blend of five live cultures, and is made with high quality milk. It retails in a 500g recyclable pack with 4 x 125g pots

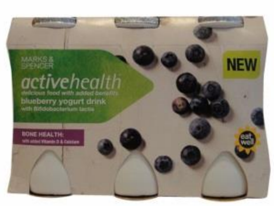
Cheesecake with Blueberries



Company: Lidl
Brand: McEnnedy American Way
Subcategory: Chilled Desserts
Launch type: New product
Price in US$: 2.14
Claims: N/A

Description: McEnnedy American Way (Cheesecakes with Blueberries) are layered with blueberry sauce, cream cheese and biscuit crumbs. The product retails in a 200g pack of 2 x 100g units.

Blueberry Yogurt Drink



Company: Marks & Spencer
Brand: Marks & Spencer Active Health
Subcategory: Drinking Yogurt & Liquid Cultured Milk
Launch type: New variety/range extension
Price in US$: 4.00
Claims: Added calcium, low/no/reduced fat, vegetarian, vitamin/mineral fortified, bone health, ethical - environmentally friendly package, weight and muscle gain

Description: Marks & Spencer Active Health Blueberry Yogurt Drink is enriched with calcium and vitamin D and provides a source of protein, which is needed to maintain growth in muscles. Vitamin D helps the body to absorb calcium and phosphorus, needed for building bones. This vegetarian, fat free product is made with British milk and contains Bifidobacterium lactis. It retails in a 600ml recyclable pack containing six 100ml recyclable bottles.

***Source for all:** Mintel, 2015*

STANDARDS

Prior to exporting blueberries to the European Union (EU), exporters should consult the following resources:

Quality

The quality of blueberries being exported to the EU, at a bare minimum, should be uniform in colour, have similar varietal characteristics, be clean and free of vegetable material and have practically no unripe berries. Fresh blueberry imports, in the EU, must comply with the marketing or equivalent standards (CBI, 2013). Please consult the below links for further information on the acceptable quality for blueberry exports to the EU:

- UNECE standards for berry fruits
- General Marketing Standards of Regulations (EU) 543/2011
- Codex Alimentarius ('Food code' of WHO and FAO)

Packaging

When packaging their product for export to the EU, exporters need to ensure that the packaging will protect the blueberries from contamination, leakage, and dehydration (CBI, 2013). Consult the below link for further packaging specifications:

- FAO - packaging and transport of tropical fresh fruit and vegetables

Labelling

Consumer package labelling must comply with the rules and regulations applied in the EU and European Free Trade Association (EFTA) market. A label cannot contain any toxic ink or glue and the following items should be on the label of (pre-packed) fresh fruits (CBI, 2013 and Regulation (EU) No 1169/2011):

- The name of the food;
- List of ingredients;
- Any ingredient or processing aid listed in Annex II or derived from a substance or product listed in Annex II causing allergies or intolerances used in the manufacture or preparation of a food and still present in the finished product, even if in an altered form;
- The quantity of certain ingredients or categories of ingredients;
- The net quantity of the food;
- The date of minimum durability or the ‘use by’ date;
- Any special storage conditions and/or conditions of use;
- The name or business name and address of the food business operator;
- The country of origin or place of provenance;
- Instructions for use where it would be difficult to make appropriate use of the food in the absence of such instructions;
- With respect to beverages containing more than 1,2 % by volume of alcohol, the actual alcoholic strength by volume;
- A nutrition declaration.
- In the case of frozen products the term “frozen” or “solid frozen” has to appear on the label; and
- Any certification logo or retailer logo, in the case of private label products, should be on the label.

Consult the following links, for more detailed information on labelling requirements in the EU:

- EU Directive 2000/13/EC replace by Regulation (EU) No 1169/2011 as of December 31, 2014. This new regulation establishes the general principles, requirements and responsibilities governing food information, and in particular food labelling (CBI, 2013).

FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in Brussels**
  http://www.tradecommissioner.gc.ca/eng/office.jsp?oid=140&cid=111

- **Find a Trade Commissioner**
  www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

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- ats-sea.agr.gc.ca

For additional information on ANUGA 2015, please contact:

Ben Berry, Deputy Director
Trade Show Strategy and Delivery
Agriculture and Agri-Food Canada
ben.berry@agr.gc.ca

RESOURCES

Agriculture and Agri-Food Canada (AAFC): *"Canadian Blueberries"*, retrieved July 30, 2015 from: http://www.agr.gc.ca/eng/industry-markets-and-trade/exporting-importing-and-buying-assistance/buy-from-canada/canadian-blueberries/?id=1426167712421

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Euromonitor International, March 2014: *"Blueberries the Most Dynamic Fruit in 2013"*

Euromonitor International, May 2015: *"If Blueberries Can't Be Seasonal and Local, They Must At Least Be Ethical"*

Food and Agriculture Organization of the United Nations (FAOSTAT) Statistics Division, Blueberry production statistics, retrieved July 2015

Global Trade Atlas, July 2015

Mintel (2015) Global New Products Database

Blueberries in the European Union

Global Analysis Report

Prepared by: Stephanie Clarke, Market Analyst

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For additional copies, to request an alternate format, and for all other inquiries regarding this publication, please contact:
Agriculture and Agri-Food Canada, Global Analysis
1341 Baseline Road, Tower 5, 3rd floor
Ottawa, ON
Canada, K1A 0C5
E-mail: infoservice@agr.gc.ca

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