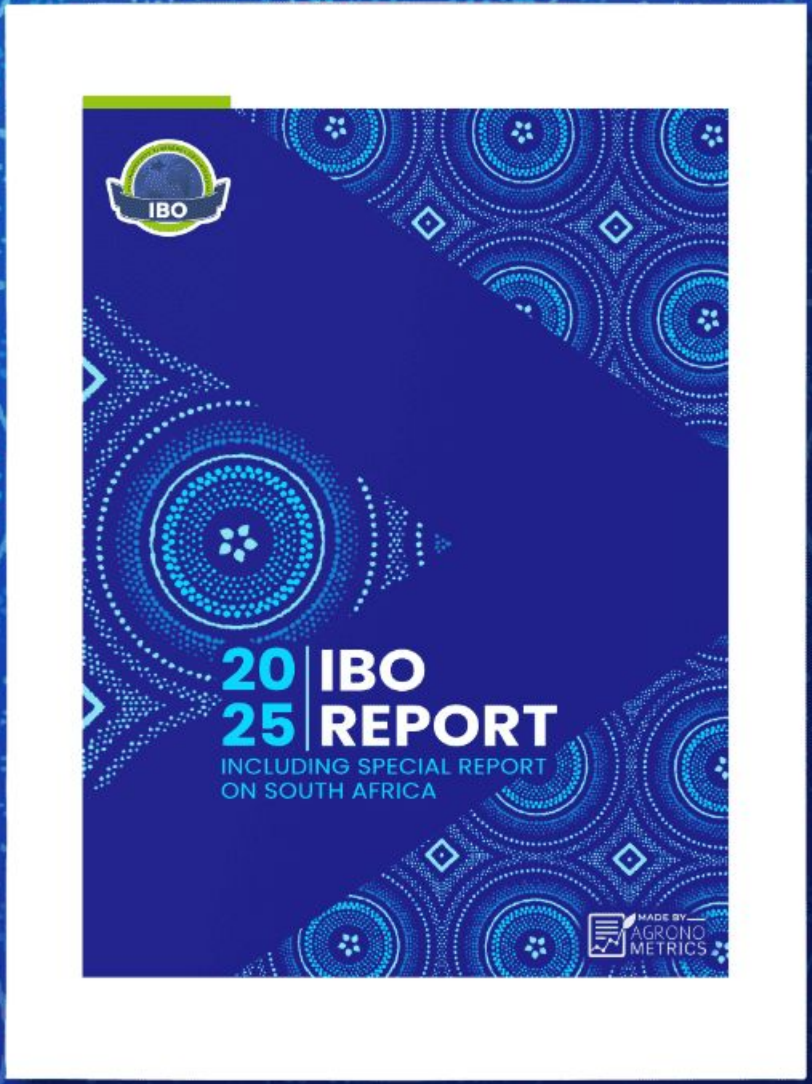

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INTERNATIONAL BLUEBERRY ORGANIZATION

2025 IBO REPORT

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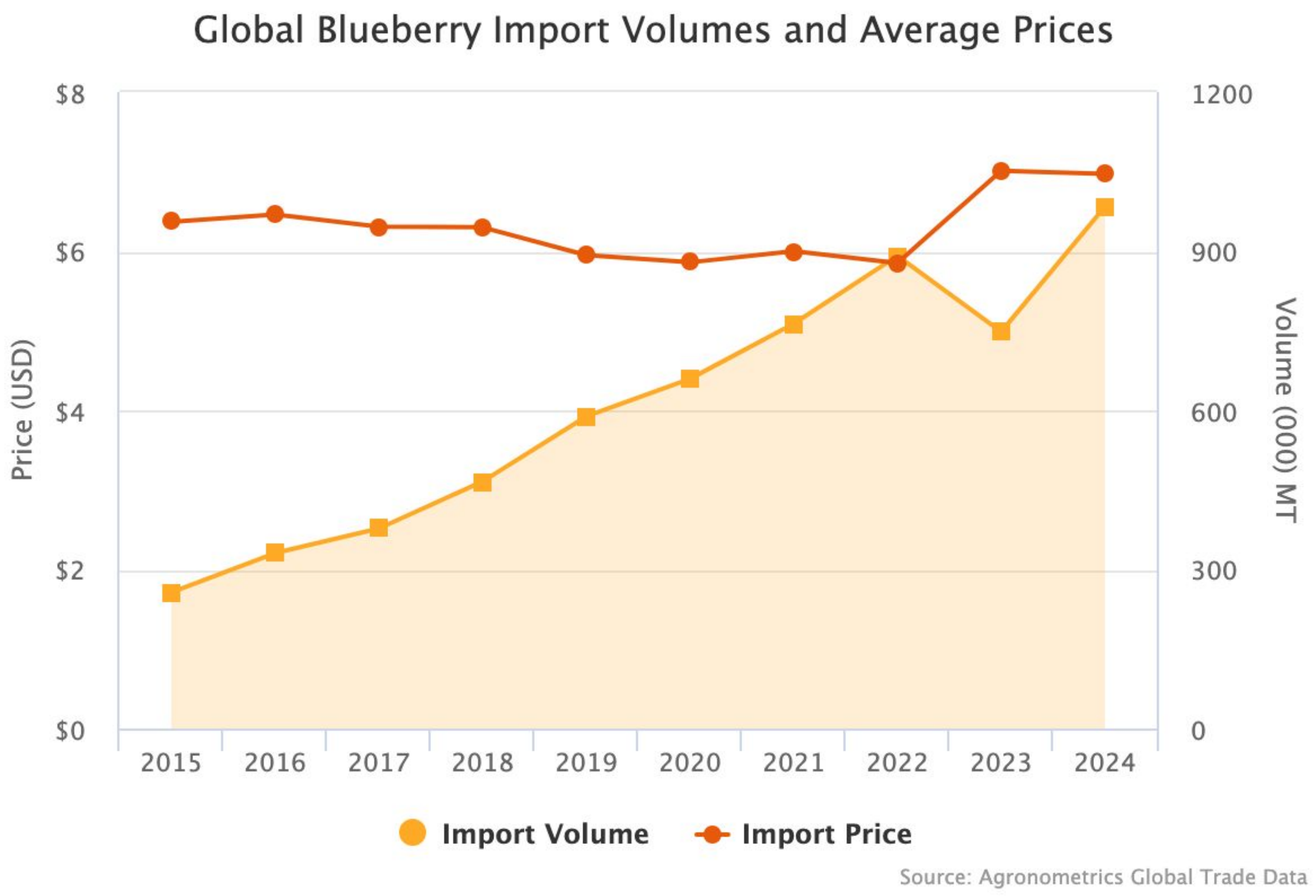
2025 IBO REPORT
INCLUDING SPECIAL REPORT ON SOUTH AFRICA

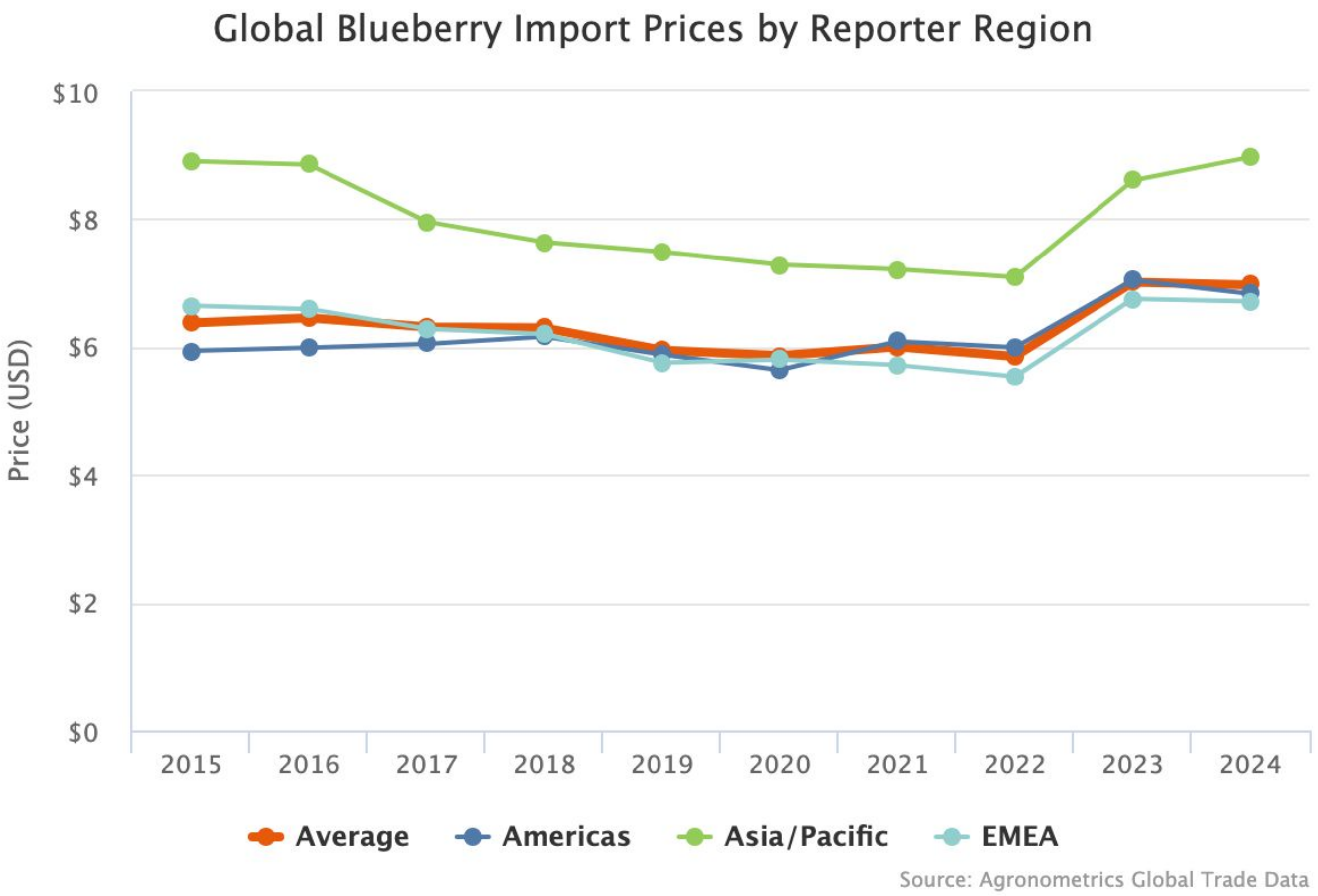
GLOBAL PRICING TRENDS

GLOBAL CROSS BORDER PRICING TRENDS



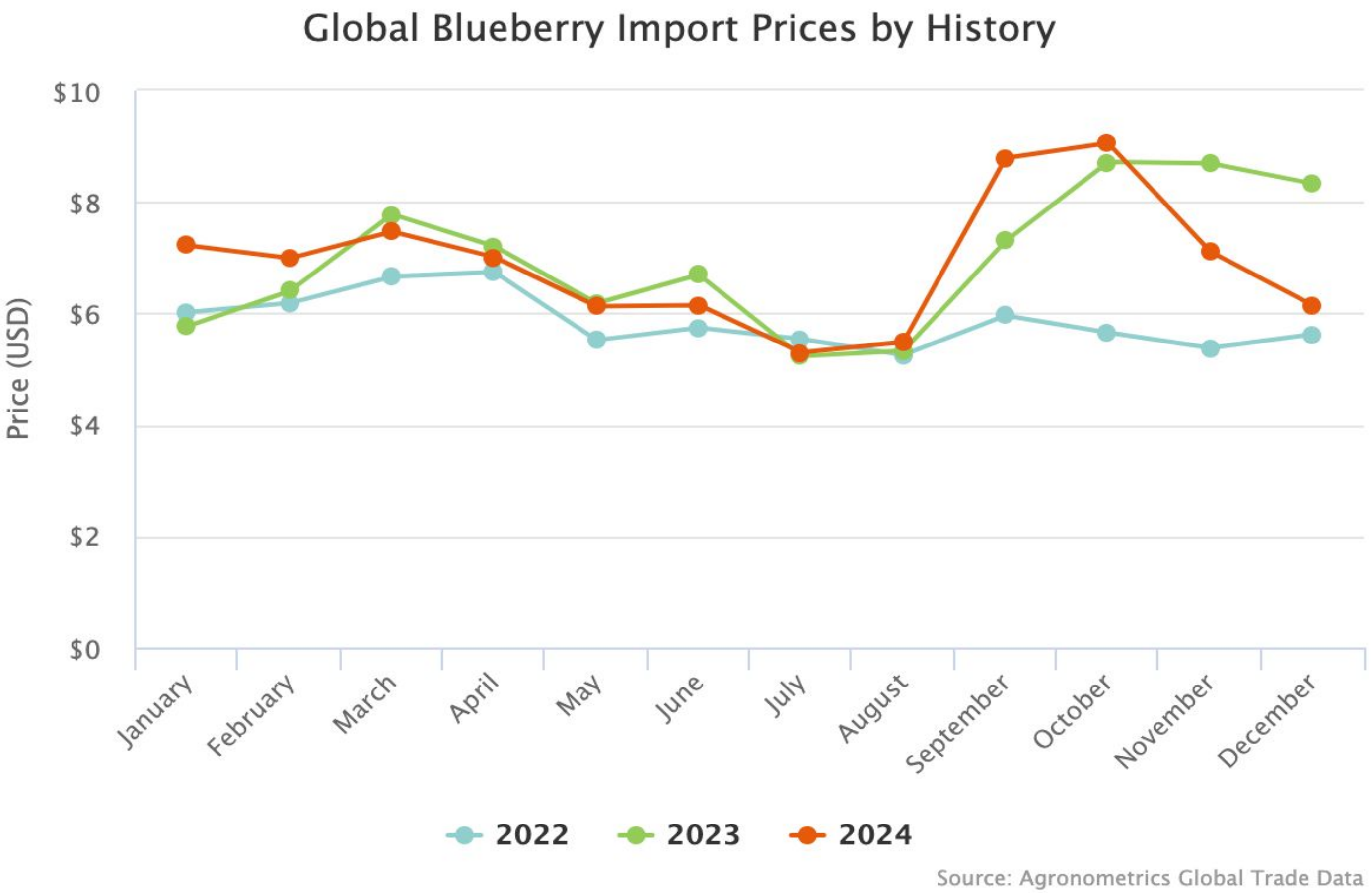
- **High but Stabilizing Prices:** Remaining elevated at just under $7/kg, among the highest levels of the past decade
- **Volume Recovery:** Import volumes rebounded sharply in 2024, but shy of trend
- **Long-Term Growth:** Strong and sustained growth in demand outpaced volumes in 2024

GLOBAL CROSS BORDER PRICING TRENDS



- **Global Price Trends:** Prices remained high across all regions in 2024 reflecting delayed Peru and other supply issues
- **EMEA:** Supply constraints from Morocco, Spain, and Peru continuing to influence the market
- **Asia/Pacific:** Reached record-high prices in 2024, reflecting dependance on Peru and growth in demand
- **Americas:** Prices settled just below 2023 levels, stabilizing at historically high averages

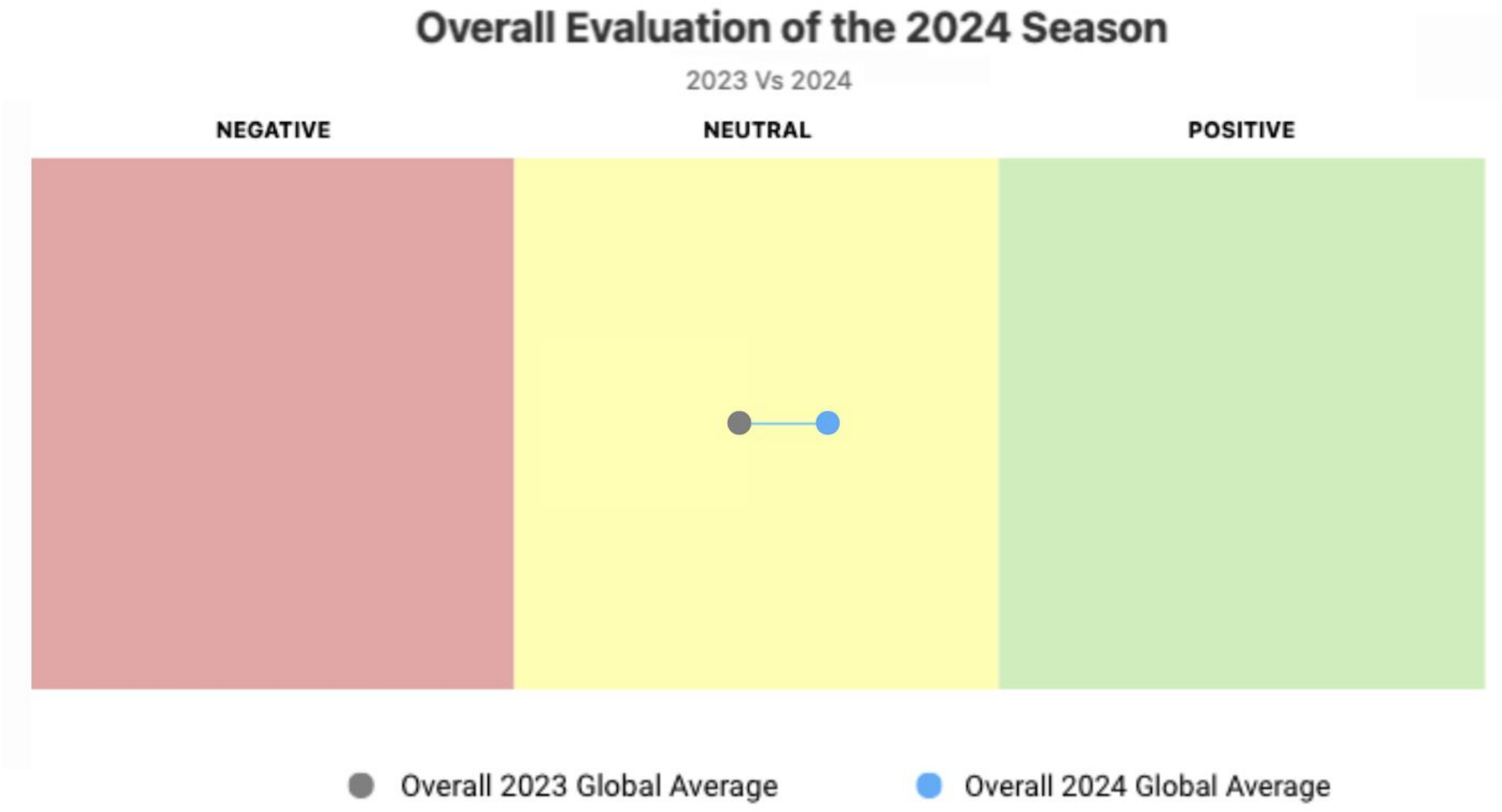
GLOBAL CROSS BORDER PRICING TRENDS



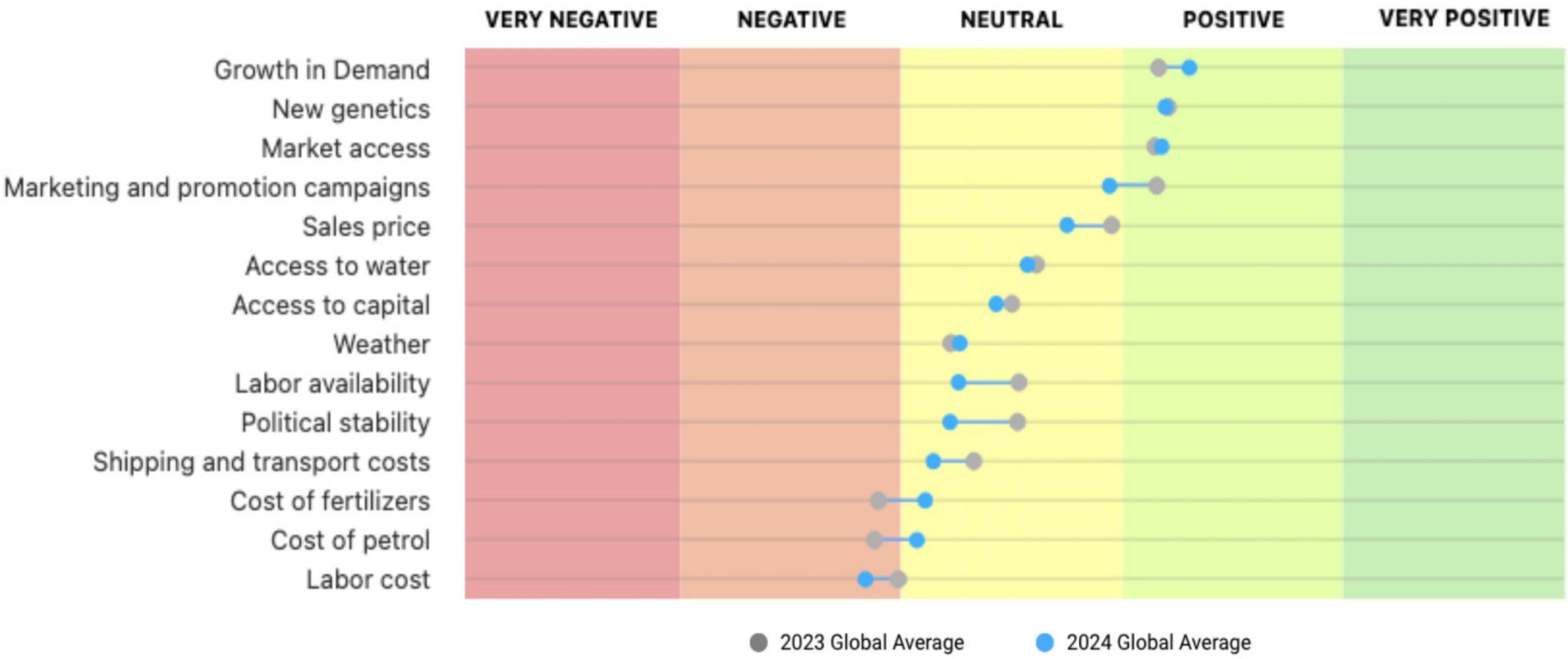
- **Early-Year Price Rise:** Prices started 2024 at elevated levels, supported by strong demand and reduced supply
- **Spring Normalization:** Prices in March, April, and May were similar to those seen in 2023, ranging between $6 to $8
- **Mid-Year Dip:** By June–July, prices softened, normalizing as US and other Northern Hemisphere supply entered the market
- **Late-Year Volatility:** From September onward, prices spiked on delays from Peru, peaking above **$9/kg** in October before easing

GLOBAL PRODUCTION SURVEY [PULSE CHECK]

OVERALL EVALUATION OF THE 2024 SEASON



FACTORS AFFECTING PRODUCTION

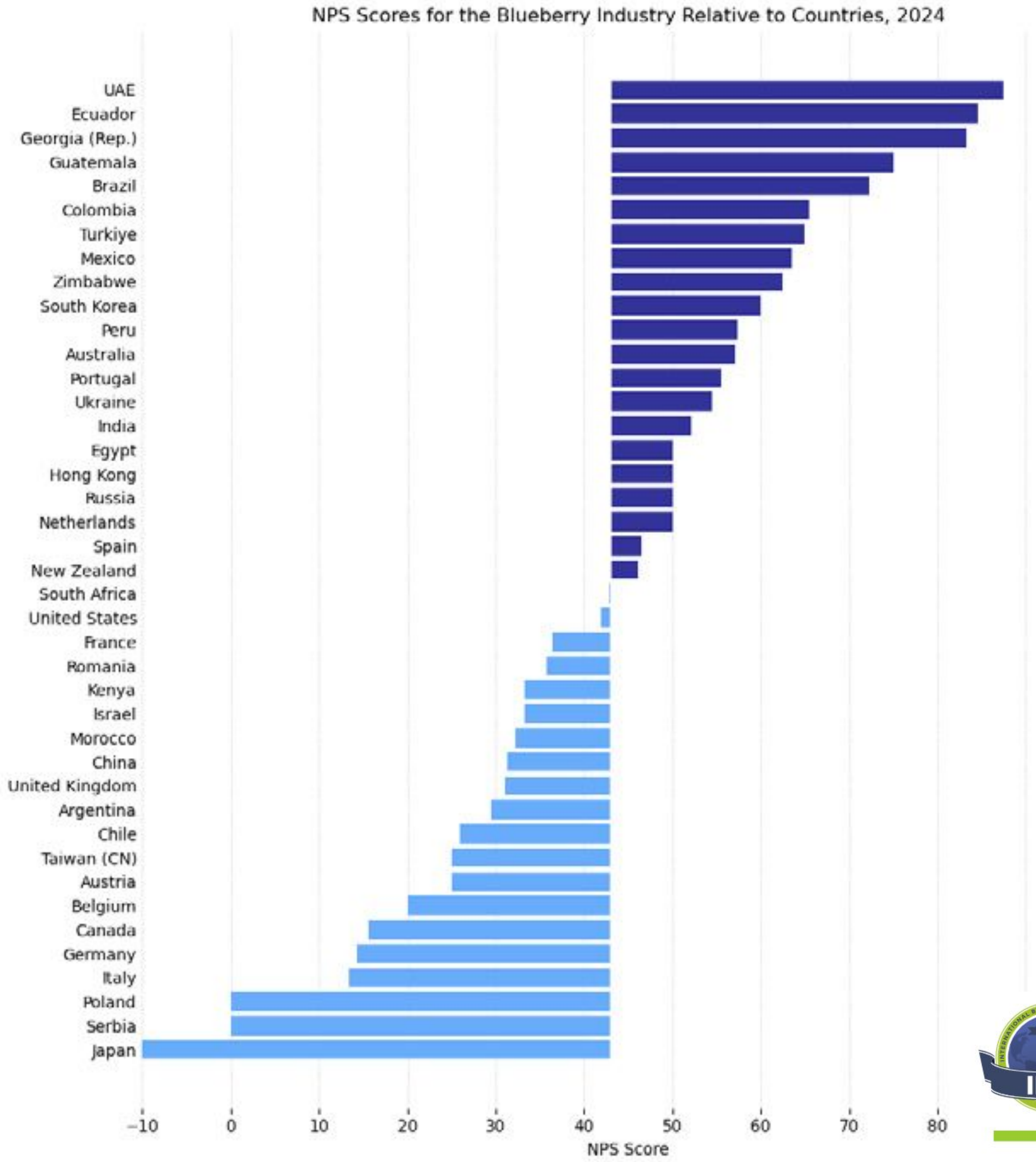


BLUEBERRY INDUSTRY
NET PROMOTER SCORE (NPS)

- Strong industry sentiment placing industry firmly in the “great” range.

BLUEBERRY INDUSTRY NET PROMOTER SCORE (NPS)

- IBO members (26% of respondents) reported a much higher NPS (59.4) vs non-members (37.3)
- Countries like UAE, Ecuador, Georgia, and Brazil scored above 70 (“excellent”)



INDUSTRY TRENDS

PERU'S GLOBAL IMPACT

- **Global supply leader:** Peru now accounts for **one-third** of global fresh blueberry production
- **New quality benchmark:** Peru has established global standards for fruit consistency and quality at scale
- **Tariff-driven diversification:** A 10% U.S. tariff on Peruvian blueberries, its largest export market, is accelerating diversification into Asia, the Middle East, and India

CATEGORY GROWTH & THE PREMIUMIZATION DRIVER

- **Value growth outpacing volume:** In most major markets, category value growth has exceeded volume growth.
- **Premiumization reshaping perceptions:** Larger, firmer, flavor driven blueberries are increasingly equated with superior quality in the eyes of consumers.
- **New SKU Categories:** The rise of new categories and programs in the U.S. is redefining the dynamics of the premium segment.
- **Organic category strength:** The organic blueberry category continues to perform strongly, contributing to overall demand expansion.

THE GROWTH PARADOX

- **Uneven growth dynamics:** Certain industry participants are experiencing volume growth without corresponding value gains. Others are seeing value growth outstrip volume growth.

- **Widening price bifurcation:** Price bifurcation is widening, with premium fruit commanding higher margins while standard fruit underperforms

- **Two-speed industry model:** The industry is evolving into a two-tier system, where advanced operations prosper and others encounter margin pressures

- **Rising generic oversupply risks:** The risk of oversupply is intensifying for the standard category, underscoring the need for sustained investment in demand stimulation

- **Profitability not guaranteed:** Current conditions confirm that volume growth alone does not guarantee profitability.

HIGH CHILL GENETICS & MECHANICAL HARVESTING PRACTICES

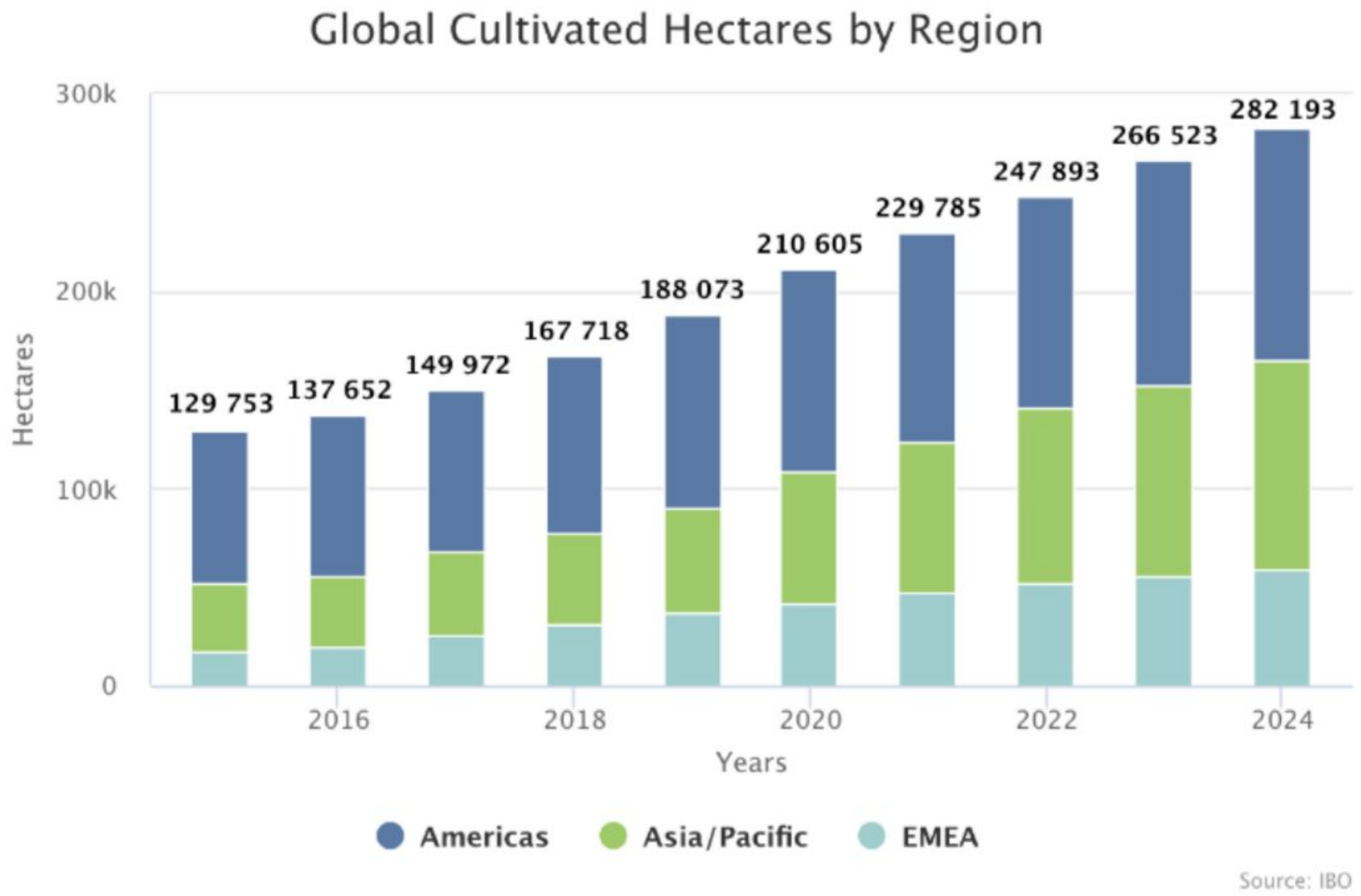
- **Focus on high chill varieties:** Breeding programs worldwide are increasing attention to development of high chill cultivars for key markets such as the U.S., EU, and China
- **Slow breeding progress:** Extended cycles and challenges with maintaining cold-hardiness are delaying new variety releases
- **Cautious grower adoption:** Conversion to high chill varieties requires long-term investment, limiting widespread uptake
- **Emerging machine harvesting:** Mechanical harvesting for fresh blueberries is viewed as a key efficiency tool but remains limited at scale
- **Genetics enabling harvestability:** Breeding efforts are emphasizing firmness and detachability to improve machine harvesting outcomes

GLOBAL CONSUMPTION & INSTITUTIONAL INVESTOR CAPITAL

- **Expanding global demand:** Blueberry consumption is growing worldwide, with demand becoming more balanced and less reliant on North America
- **Regional growth hotspots:** Robust consumption increases are evident in Europe, China, Southeast Asia, the Middle East, and India
- **Capital investment mainstreamed:** Institutional and private capital have become normalized, fueling professionalized large-scale operations
- **Widening structural divide:** A growing gap exists between smallholder growers and consolidated, advanced farming enterprises
- **Marketing-driven success:** The strong demand performance in 2024 was supported by long-term marketing investment and coordinated industry effort
- **Need for diversification:** Continued diversification in demand creation is critical to absorb the expanding global supply

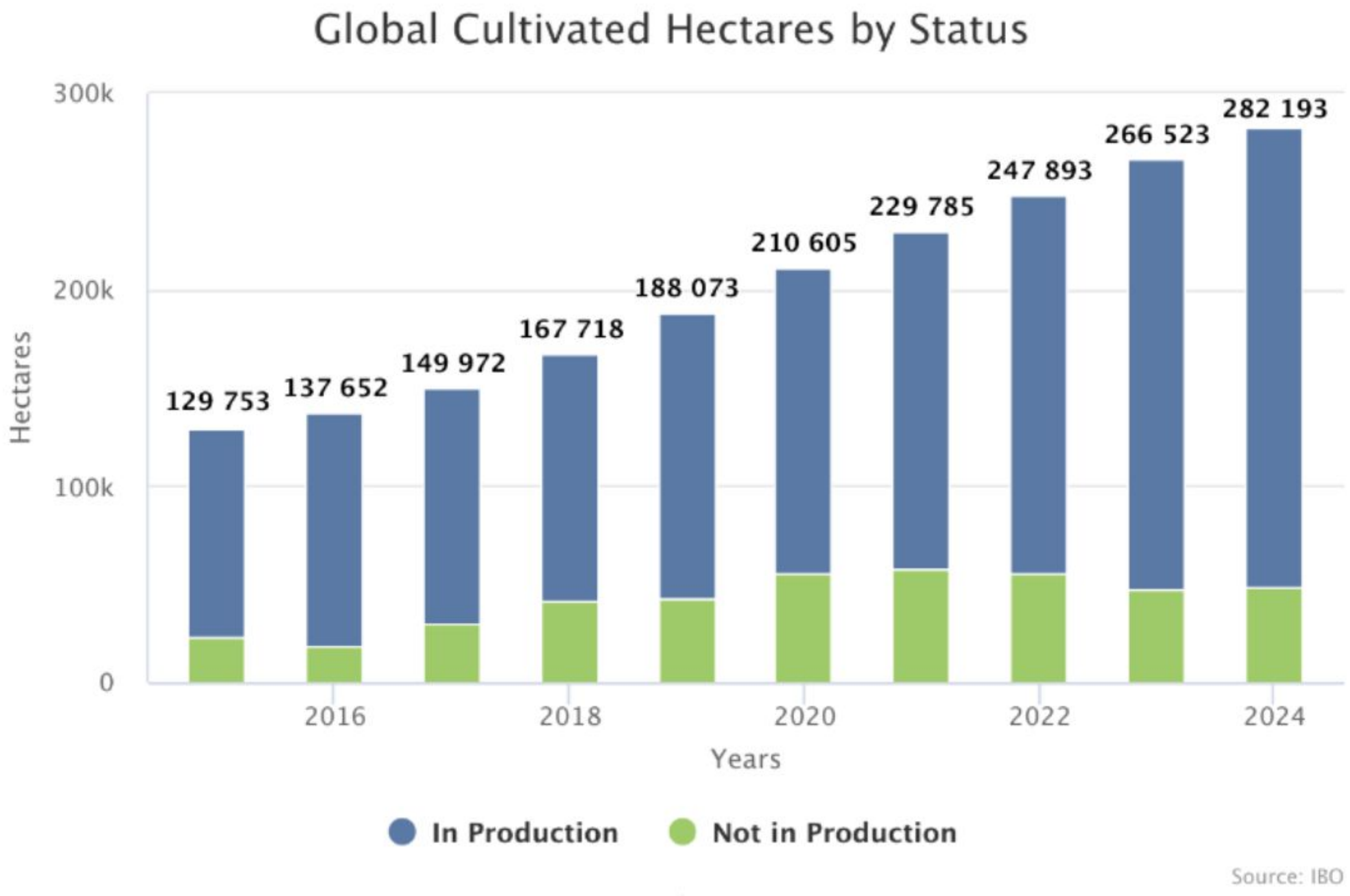
GLOBAL STATISTICS

GLOBAL CULTIVATED HECTARES BY REGION



In 2024 Hectares Planted totaled estimated 282,193
Planted Base is International

GLOBAL CULTIVATED HECTARES BY STATUS



Estimated 17.07% of 2024 Hectares Planted are not in commercial production
Down from 17.60% in 2023

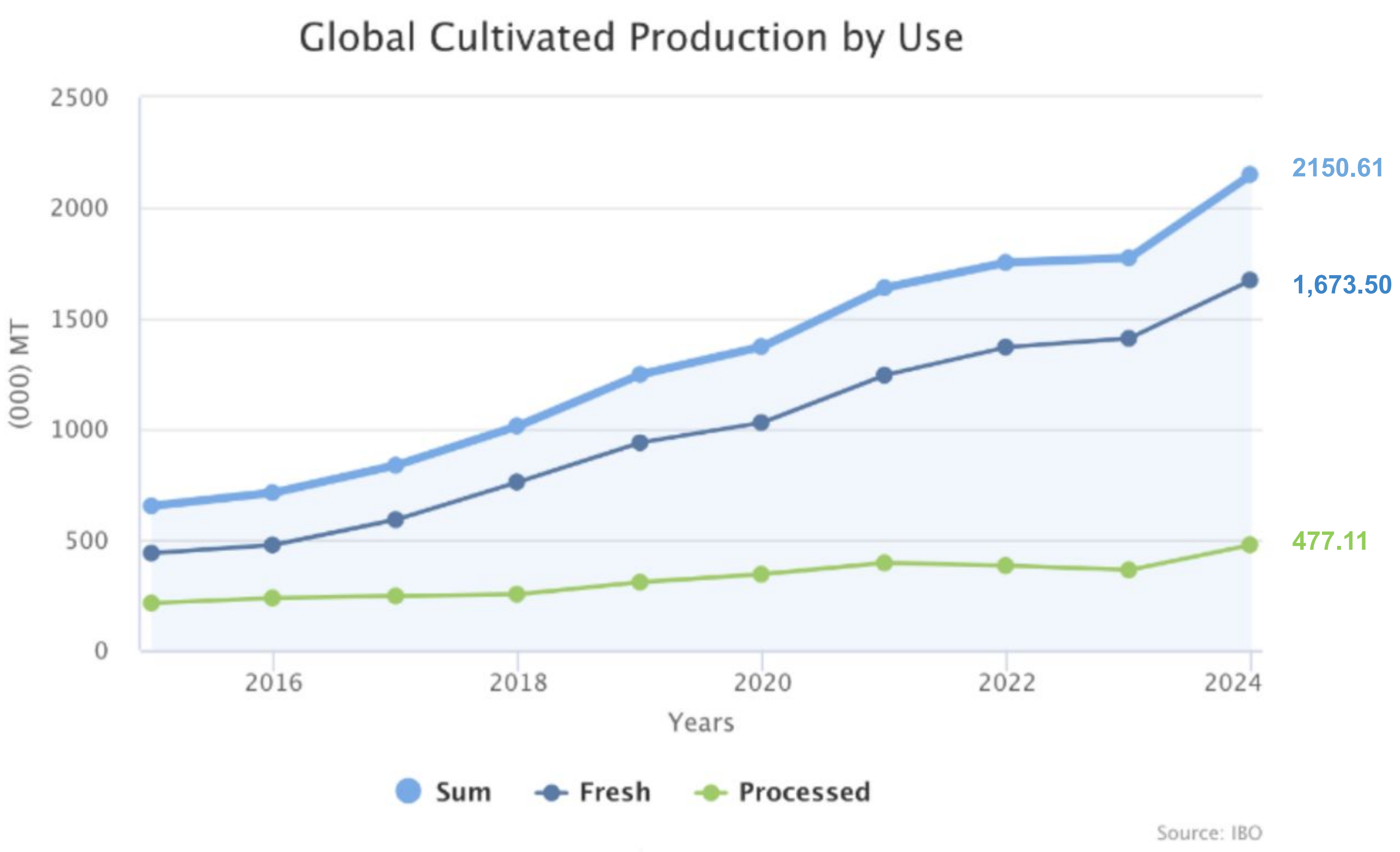
GLOBAL CULTIVATED HECTARES BY REGION

Global Cultivated Hectares by Subregion

Global Cultivated	Hectares Planted					2024 Production (000) MT		
Growth Totals	**2020**	**2021**	**2022**	**2023**	**2024**	**Fresh**	**Process**	**Total**
Americas	**102,017**	**106,768**	**107,619**	**114,214**	**117,272**	**724.20**	**272.24**	**996.44**
South America	40,162	42,047	42,055	42,942	45,565	426.93	75.78	502.71
US & Canada	53,915	55,578	54,118	59,254	60,497	227.99	195.89	423.88
Mexico/Central America	7,940	9,143	11,446	12,018	11,210	69.28	0.57	69.85
Asia/Pacific	**66,579**	**75,984**	**88,565**	**96,984**	**106,379**	**591.87**	**160.29**	**752.16**
Asia	62,928	71,884	84,558	92,733	101,617	552.84	159.29	712.13
Pacific	3,106	3,430	3,277	3,350	3,776	31.84	0.70	32.54
Central Asia/Indian Subcontinent	545	670	730	900	986	7.19	0.30	7.49
EMEA	**42,009**	**47,033**	**51,709**	**55,326**	**58,541**	**357.43**	**44.58**	**402.01**
So. Europe/N. Africa	10,981	11,750	12,907	14,166	15,155	170.54	15.18	185.72
Eastern Europe	20,268	24,679	27,536	29,294	30,099	105.05	13.16	118.21
Western/Central Europe	6,122	5,924	6,356	6,236	6,515	28.87	10.96	39.83
Africa	3,998	3,801	3,692	3,616	3,719	44.52	4.80	49.32
Middle East	640	880	1,218	2,014	3,053	8.45	0.48	8.93
Global Cultivated Totals	**210,605**	**229,785**	**247,893**	**266,523**	**282,193**	**1,673.50**	**477.11**	**2,150.61**

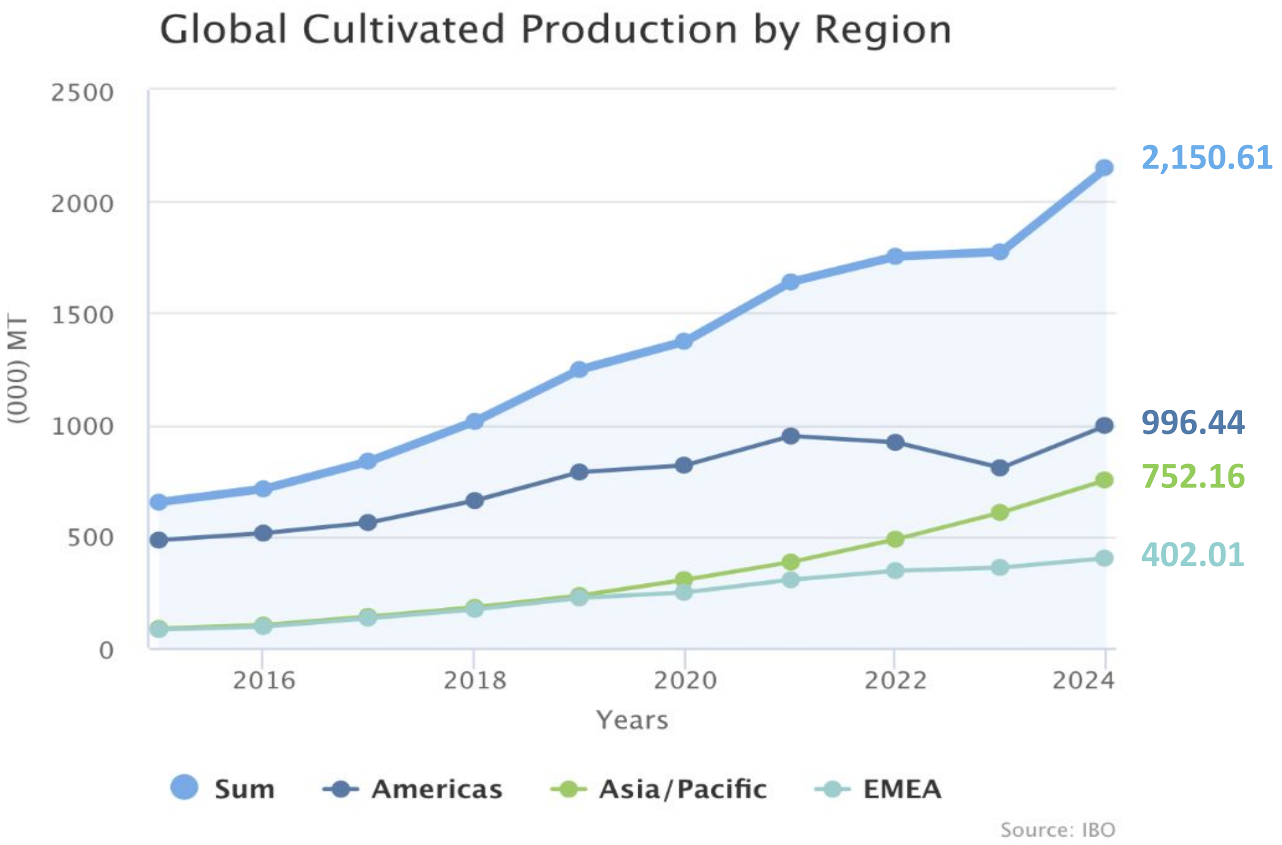
Source: IBO

GLOBAL CULTIVATED PRODUCTION BY USE



In 2024 an estimated 22% of production went to the processed industry

GLOBAL CULTIVATED PRODUCTION BY REGION



In 2024 an estimated 2,150.61 (000) MT were produced – Fresh & Processed

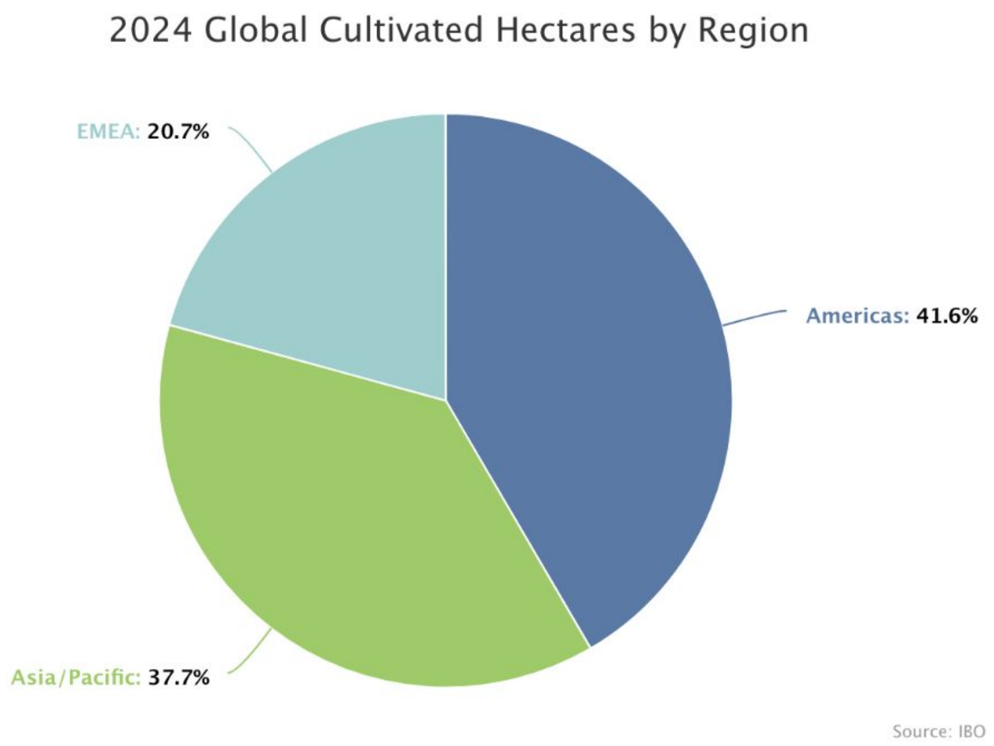
GLOBAL CULTIVATED PRODUCTION BY REGION

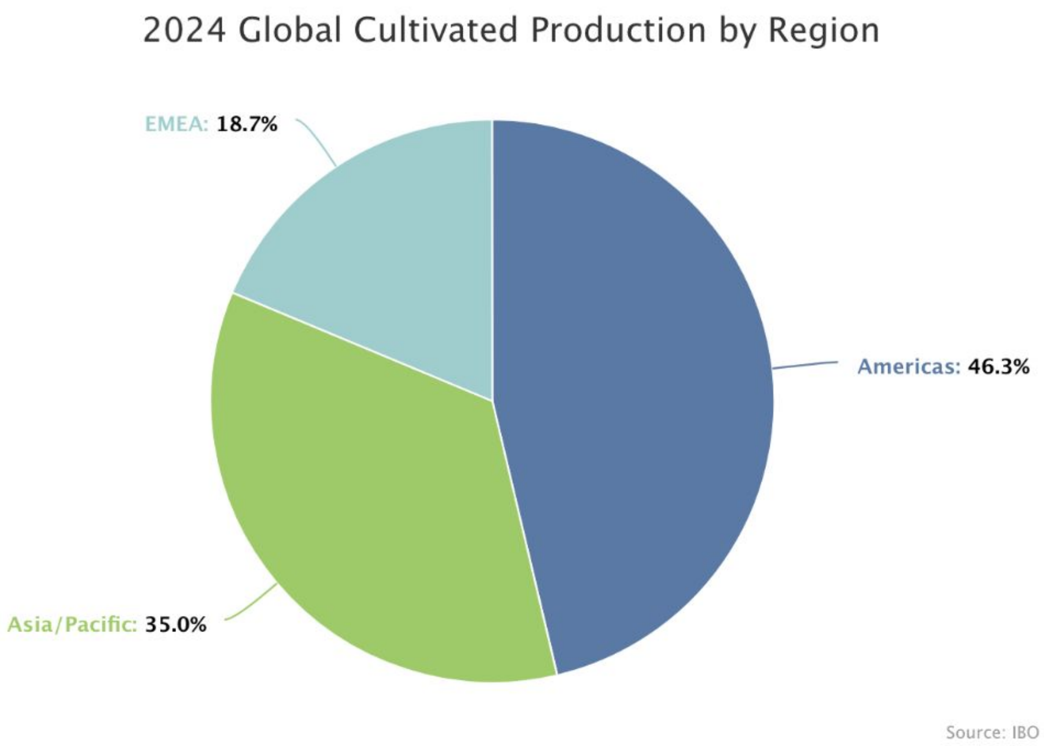
Global Cultivated Production by Subregion (000) MT

Global Cultivated	2022			2023			2024		
Productions Totals	**Fresh**	**Process**	**Total**	**Fresh**	**Process**	**Total**	**Fresh**	**Process**	**Total**
Americas	**671.84**	**248.76**	**920.60**	**607.04**	**199.50**	**806.54**	**724.20**	**272.24**	**996.44**
South America	404.30	85.81	490.11	328.58	60.28	388.86	426.93	75.78	502.71
US & Canada	192.29	162.01	354.30	207.40	137.99	345.39	227.99	195.89	423.88
Mexico/Central America	75.25	0.94	76.19	71.06	1.23	72.29	69.28	0.57	69.85
Asia/Pacific	**383.28**	**103.48**	**486.76**	**474.92**	**131.88**	**606.80**	**591.87**	**160.29**	**752.16**
Asia	357.73	102.69	460.42	445.08	130.98	576.06	552.84	159.29	712.13
Pacific	20.94	0.49	21.43	23.66	0.60	24.26	31.84	0.70	32.54
Central Asia/Indian Subcontinent	4.61	0.30	4.91	6.18	0.30	6.48	7.19	0.30	7.49
EMEA	**315.33**	**30.67**	**346.00**	**328.26**	**32.07**	**360.33**	**357.43**	**44.58**	**402.01**
So. Europe/N. Africa	142.07	13.61	155.68	146.54	14.12	160.66	170.54	15.18	185.72
Eastern Europe	98.75	6.08	104.83	104.00	6.21	110.21	105.05	13.16	118.21
Western/Central Europe	33.64	8.02	41.66	30.91	8.15	39.06	28.87	10.96	39.83
Africa	36.11	2.70	38.81	40.78	3.20	43.98	44.52	4.80	49.32
Middle East	4.76	0.26	5.02	6.03	0.39	6.42	8.45	0.48	8.93
Global Cultivated Totals	**1,370.45**	**382.91**	**1,753.36**	**1,410.22**	**363.45**	**1,773.67**	**1,673.50**	**477.11**	**2,150.61**

Source: IBO

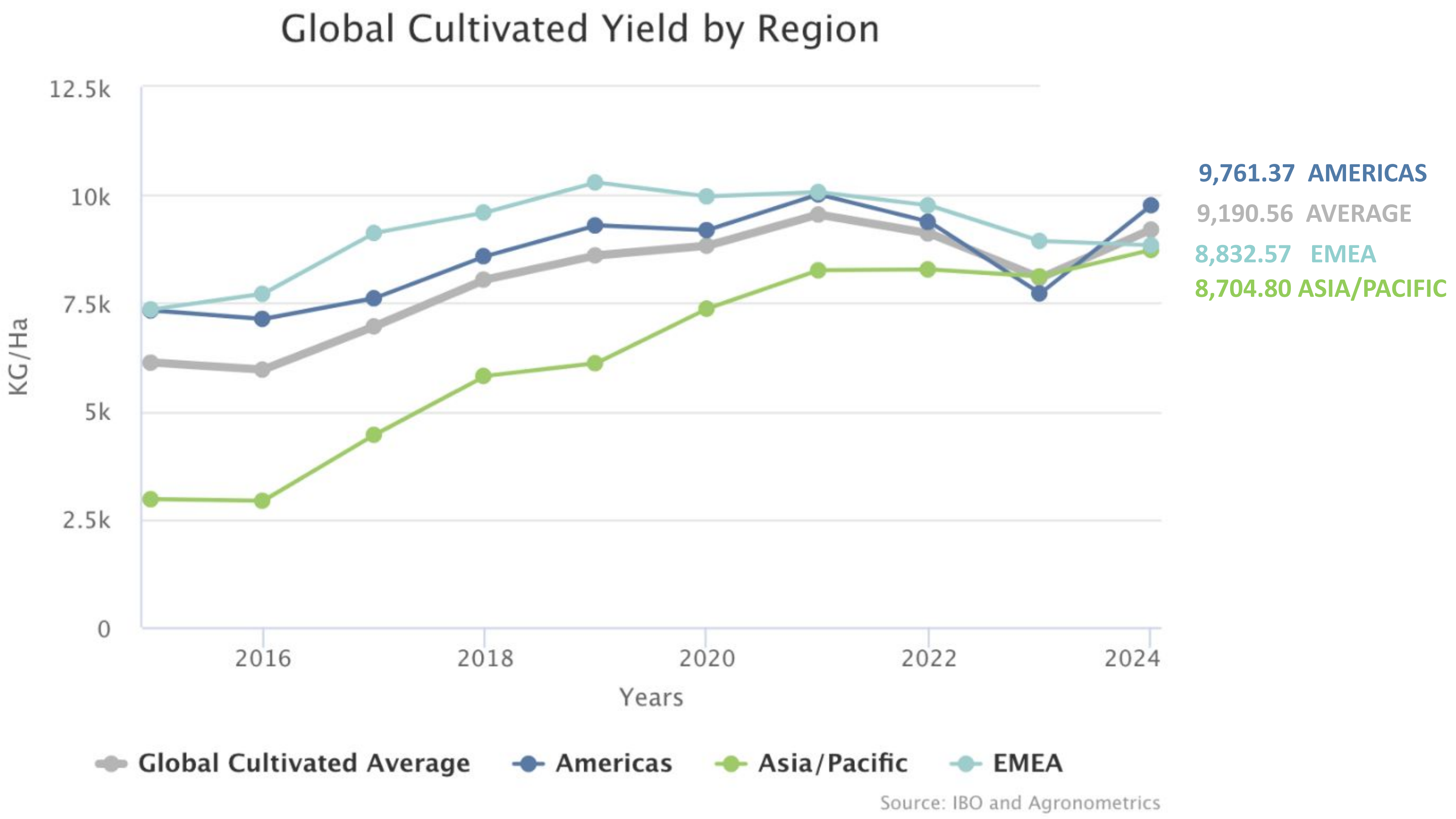
GLOBAL CULTIVATED HECTARES AND PRODUCTION





Americas Production in its third year below 50% of total plantings & volume

GLOBAL CULTIVATED YIELDS BY REGION



Increase in Global Yields, up from 8,080.97 (Kg/Ha) in 2023

GLOBAL CULTIVATED PRODUCTION METRICS

Global Cultivated 2024 Production Metrics

Hectares Planted:	**282,193 Ha**
Hectares in Production:	**234,002 Ha**
Production:	**2,150.61 (000) MT**
Growth in Production[1]:	▲376.94 (000) MT (21.25%)
Growth from Hectares[2]:	▲155.52 (000) MT (41.26%)
Growth from Yield[3]:	▲221.42 (000) MT (58.74%)
Yield:	**9,190.56 (Kg/Ha)**

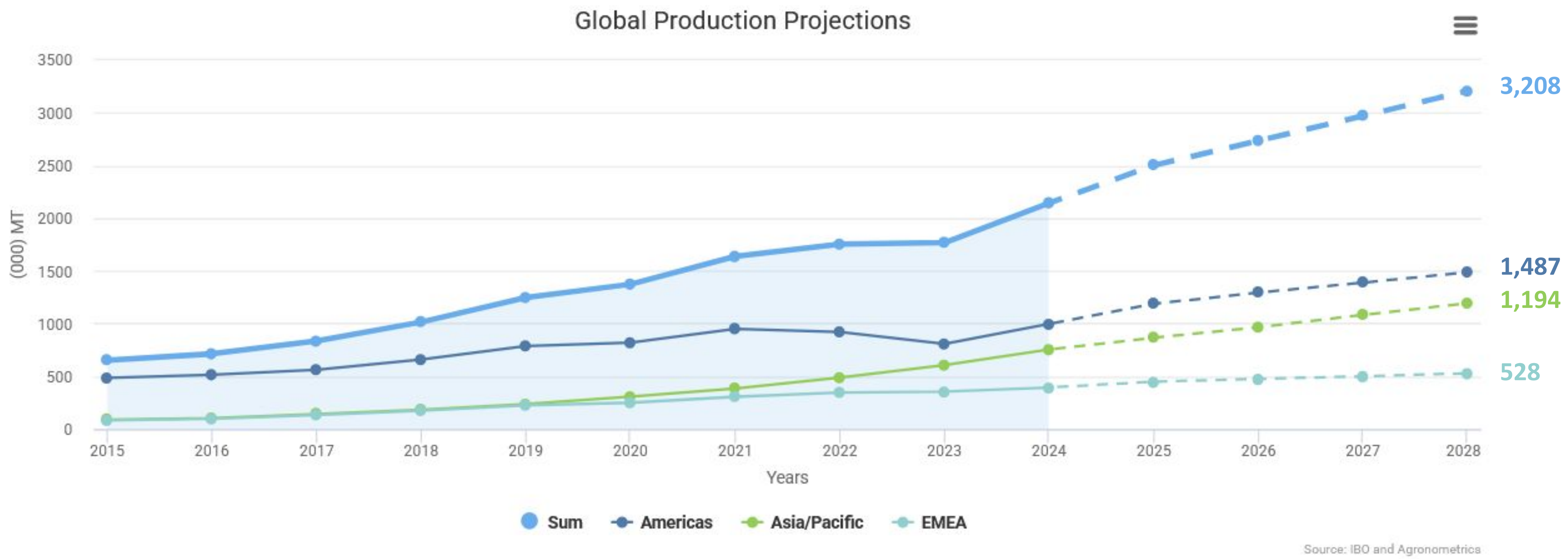
Source: IBO and Agronometrics

[1] Volume change compared to previous season

[2] Change in volume due to hectares entering or leaving production

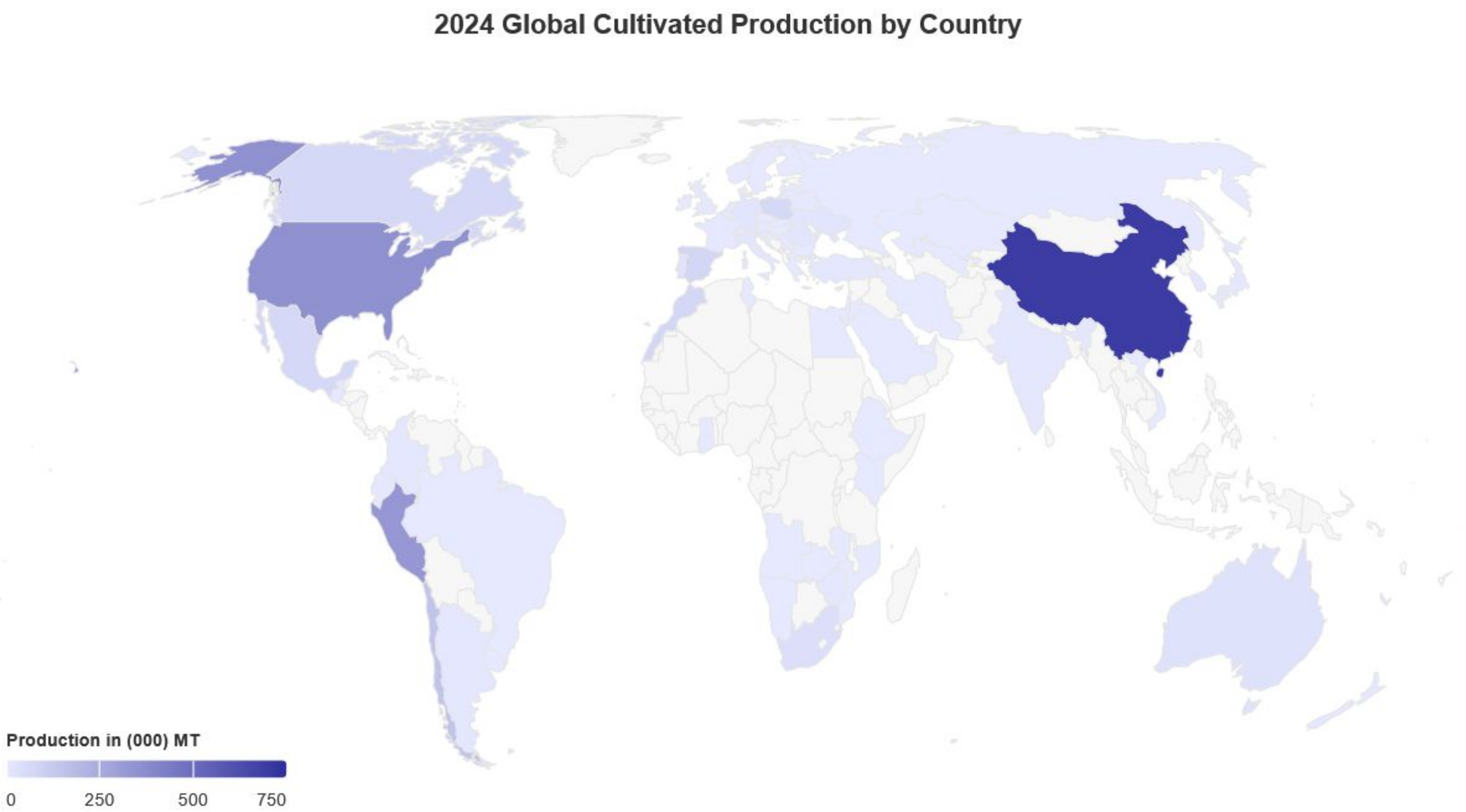
[3] Change in volume due to field productivity (yields)

GLOBAL CULTIVATED PRODUCTION PROJECTIONS BY REGION



In 2028 an estimated 3,208 (000) MT will be produced – Fresh & Processed

GLOBAL CULTIVATED PRODUCTION BY COUNTRY



Source: IBO

TOP 10 CULTIVATED PLANTINGS BY COUNTRY

2024 Top 10 Cultivated Hectares by Country

#	Country	2021 Hectares	2022 Hectares	2023 Hectares	2024 Hectares
1	China	67,425	80,104	88,626	97,452
2	United States	43,214	42,084	46,709	48,585
3	Peru	19,500	20,000	21,477	25,920
4	Chile	18,802	18,375	18,071	16,000
5	Poland	11,000	11,913	12,594	12,831
6	Canada	12,364	12,034	12,545	11,912
7	Mexico	9,100	11,400	11,970	11,160
8	Spain ↑	4,570	4,810	5,496	5,914
9	Ukraine ↓	5,318	5,500	5,550	5,600
10	Morocco	3,136	3,800	4,300	4,829

These 10 countries represent 84.93% of estimated global plantings

TOP 10 CULTIVATED PRODUCTION BY COUNTRY

2024 Top 10 Cultivated Production by Country (000) MT

#	Country	2021 Production	2022 Production	2023 Production	2024 Production
1	China	350.83	450.15	563.54	698.66
2	United States	328.18	278.14	282.59	354.97
3	Peru	261.73	299.67	233.87	329.60
4	Chile	185.44	166.35	132.33	150.54
5	Spain	73.94	69.19	70.86	77.96
6	Morocco ⬆	47.21	56.50	56.05	71.73
7	Mexico ⬇	74.20	75.87	71.94	69.40
8	Canada ⬇	80.32	76.16	62.80	68.91
9	Poland ⬇	55.50	68.50	62.00	66.00
10	South Africa	26.00	30.50	35.00	38.60

These 10 countries represent 89.53% of estimated global volumes

TOP 10 CULTIVATED FRESH PRODUCTION BY COUNTRY

2024 Top 10 Cultivated Fresh Production by Country (000) MT

#	Country	2021 Fresh Production	2022 Fresh Production	2023 Fresh Production	2024 Fresh Production
1	China	271.07	349.35	434.87	542.08
2	Peru	243.53	285.58	223.87	318.10
3	United States	177.06	159.68	173.72	200.16
4	Chile	123.04	101.35	86.27	90.54
5	Spain	66.71	62.57	64.38	70.67
6	Mexico	72.70	74.93	70.71	68.83
7	Morocco ↑	44.44	53.51	52.51	68.17
8	Poland ↓	52.50	65.50	59.00	56.00
9	South Africa ↑	24.00	28.00	32.00	34.00
10	Canada ↓	33.29	32.61	33.68	27.83

These 10 countries represent 88.16% of estimated global fresh volumes

TOP 10 CULTIVATED PROCESSED PRODUCTION BY COUNTRY

2024 Top 10 Cultivated Processed Production by Country

(000) MT

#	Country	2021 Processed Production	2022 Processed Production	2023 Processed Production	2024 Processed Production
1	China	79.76	100.80	128.67	156.58
2	United States	151.12	118.46	108.87	154.81
3	Chile	62.40	65.00	46.06	60.00
4	Canada	47.03	43.55	29.12	41.08
5	Peru	18.20	14.09	10.00	11.50
6	Poland ↑	3.00	3.00	3.00	10.00
7	Germany	4.20	5.70	5.70	8.20
8	Spain ↓	7.23	6.62	6.48	7.29
9	South Africa ↑	2.00	2.50	3.00	4.60
10	Argentina ↓	4.58	6.50	4.00	4.00

These 10 countries represent 96.02% of estimated global processed volumes

TOP 10 FRESH CULTIVATED EXPORTS BY COUNTRY

2024 Top 10 Fresh Cultivated Exports by Country (000) MT

#	Country	2021 Exports	2022 Exports	2023 Exports	2024 Exports
1	Peru	-	276.72	209.63	329.09
2	Netherlands	-	117.28	94.53	125.06
3	Chile ↑	-	104.16	80.37	89.06
4	Mexico ↓	-	75.90	83.16	72.42
5	Morocco	-	51.84	49.09	64.92
6	Spain	-	57.69	46.64	54.99
7	United States ↑	-	20.55	23.44	35.24
8	Canada ↑	-	18.83	22.59	27.78
9	Hong Kong ↑	-	20.22	11.16	27.74
10	South Africa ↓	-	26.91	26.31	26.34

These 10 countries represent 88.02% of estimated global exports

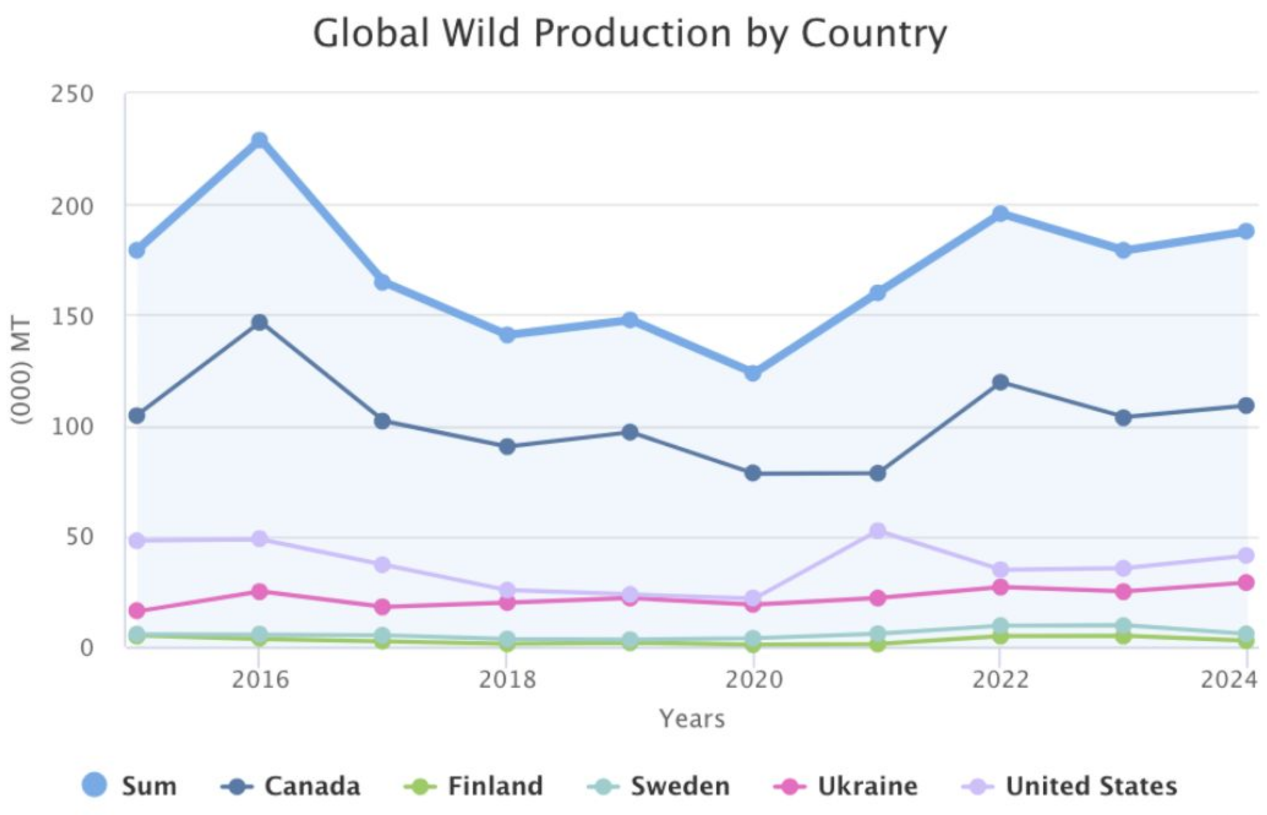
TOP 10 FRESH CULTIVATED IMPORTS BY COUNTRY

2024 Top 10 Fresh Cultivated Imports by Country (000) MT

#	Country	2021 Imports	2022 Imports	2023 Imports	2024 Imports
1	United States	253.54	289.24	248.26	305.74
2	Netherlands	115.47	149.58	103.70	144.40
3	Germany	62.29	70.72	63.18	81.08
4	United Kingdom	63.39	60.37	58.04	71.80
5	Canada	55.89	51.62	47.03	68.33
6	Spain	33.30	42.77	36.12	43.95
7	China	29.60	42.85	29.59	38.74
8	Hong Kong ↑	27.41	25.39	15.29	32.30
9	Poland ↓	14.25	21.44	18.20	25.43
10	France ↓	13.63	14.27	15.67	22.96

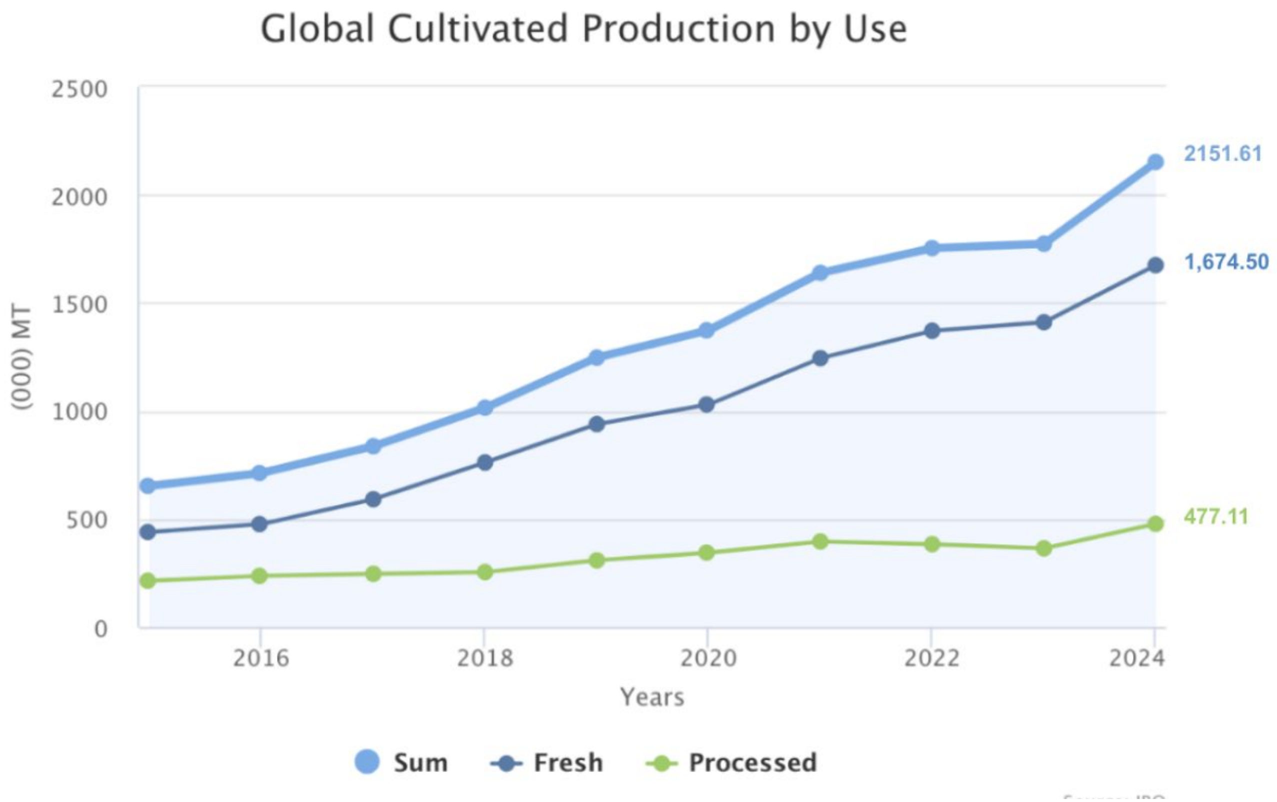
These 10 countries represent 85.03% of estimated global Imports

GLOBAL WILD PRODUCTION BY COUNTRY



- Despite volatility, production has recovered since the 2020 low, nearing 190,000 MT in 2024
- The US provides a stable secondary supply base

GLOBAL CULTIVATED & WILD PROCESSED PRODUCTION BY CATEGORY



- Global cultivated blueberry production surpassed 2,000,000 MT for the first time
- Fresh volumes reached 1,675,000 MT, maintaining dominance at ~78% of total production
- Processed volumes reached nearly 480,000 MT after several years of slower growth

CONCLUSIONS & RECOMMENDATIONS

CONCLUSIONS & RECOMMENDATIONS – Macro

Category Value and Volume Growth

- Growth is uneven: ‘premium’ blueberries drive most value growth.
- Broader category shows more even growth in value and volume.
- Opportunities lie in meeting consumer demand for quality and creating new categories/occasions.
- U.S. market: household penetration growth slowing, but niche consumers pay more for better fruit.

Quality at Scale and Market Bifurcation

- Nearly 7 months of global supply now offer next-level quality.
- Driven by new genetics, new supply sources, and professional/vertically integrated growers.
- Enabled creation of new categories and retail occasions.
- Pricing has become bimodal: premium vs. standard fruit.
- Risk of excluding growers unable to invest in higher quality production.
- Larger firms, investors, and governments could play a role in bridging the gap.

CONCLUSIONS & RECOMMENDATIONS – Macro

Consumers, Categories, and Occasions

- Strong penetration growth in Europe, Asia, and Middle East; slower growth in U.S.
- Existing consumers: opportunity to increase per-capita consumption.
- New consumers: need targeted strategies to adopt blueberries.
- Requires sustained product quality, stronger categories, and development of new occasions.

Structural Supply Challenges

- Industry faces constraints in land, water, labor, climate, capital, talent, policy, and trade.
- Growing cost-competitive, high-quality fruit will be harder in the future.
- Supply-side pressures may limit ability to meet long-term demand growth.

CONCLUSIONS & RECOMMENDATIONS

Industry Outlook

- Long-term consumption growth trend is strong but disruptions are inevitable.
- “Easy times are behind us”: competition, scaling, and challenges will intensify.
- Success requires innovation, coordination, and adaptation to new realities.
- IBO’s role: uniting the industry, fostering coordination, and tackling challenges collectively.

THANK YOU!

Special thanks to contributing country members and individuals

And once again the team – *Matt Ogg, Sarah Illyas, Claudio Riquelme and Violeta Rodríguez*

Also to Pablo Castillo and Thomas Grandperrin who took on sales for advertising

QUESTIONS & ANSWERS

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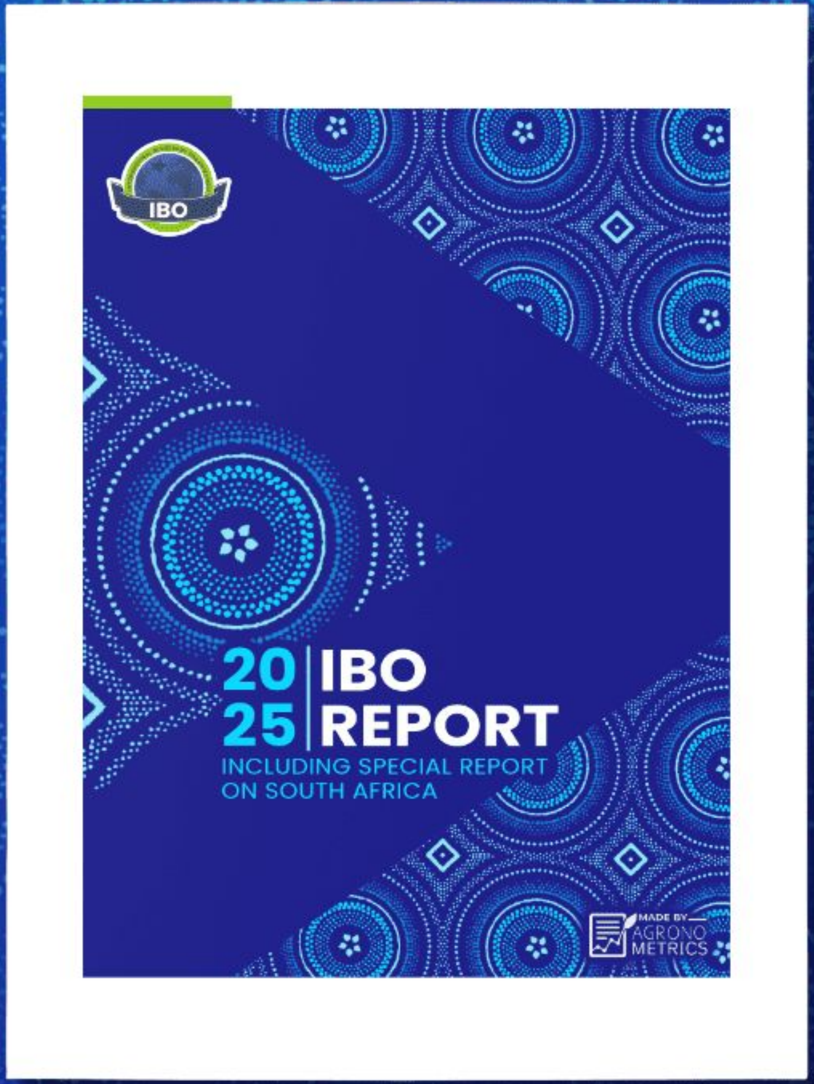
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