

International Blueberry Organization

Global Blueberry Report 2025: Key Growth Trends, Market Insights, prices and Africa in focus



Gustavo Yentzen Wilson
Agadir, Morrocco
November 13, 2025





The IBO is a global organization that brings together leaders from around the blueberry world in all segments of the industry, including blueberry producers and marketers, affiliated business, industry groups, and governmental organizations worldwide.

Its members come together to learn, share and increase the understanding of the industry, distribute information, address mutual challenges, coordinate potential solutions and explore opportunities.

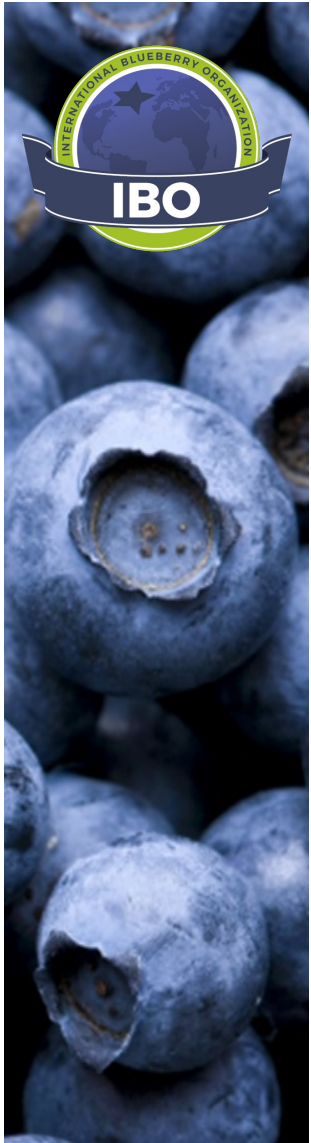
IBO Summits



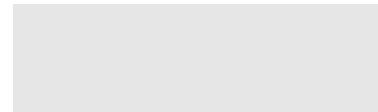
Website – Livestats

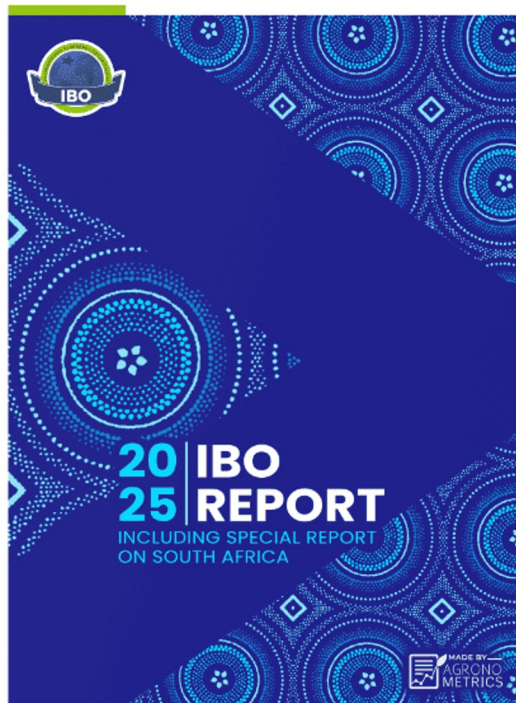
www.internationalblueberry.org



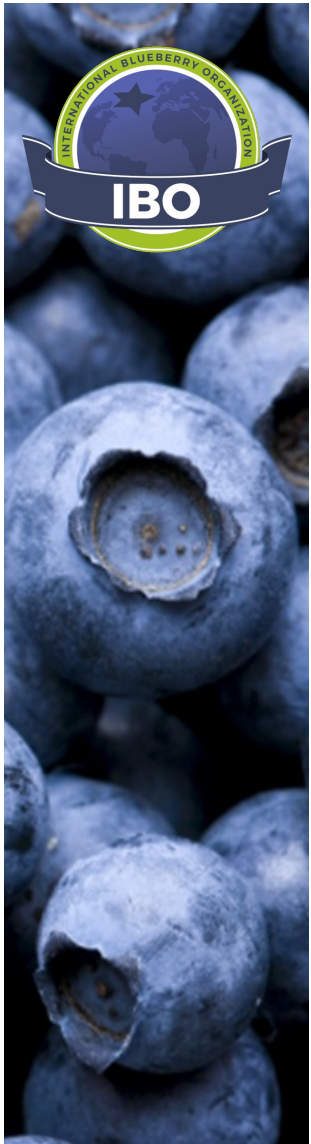


IBO Gala at Fruit Attraction, Madrid



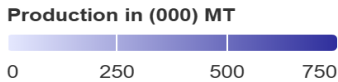
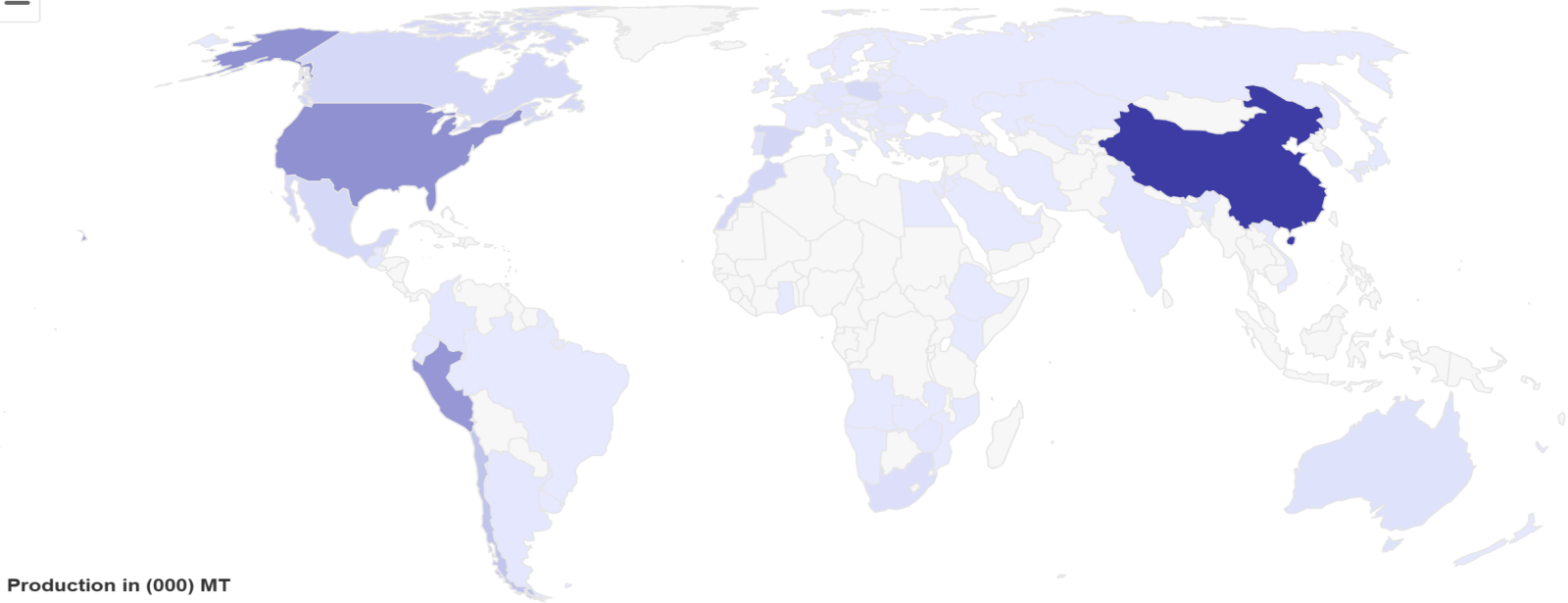


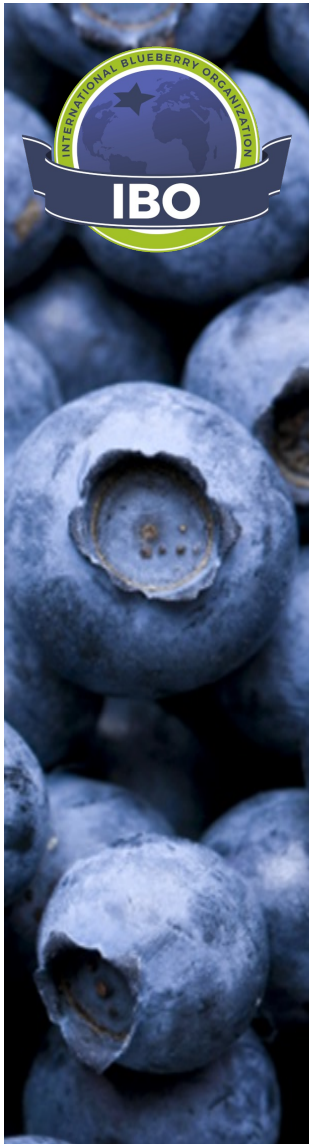
20 | IBO 25 | REPORT



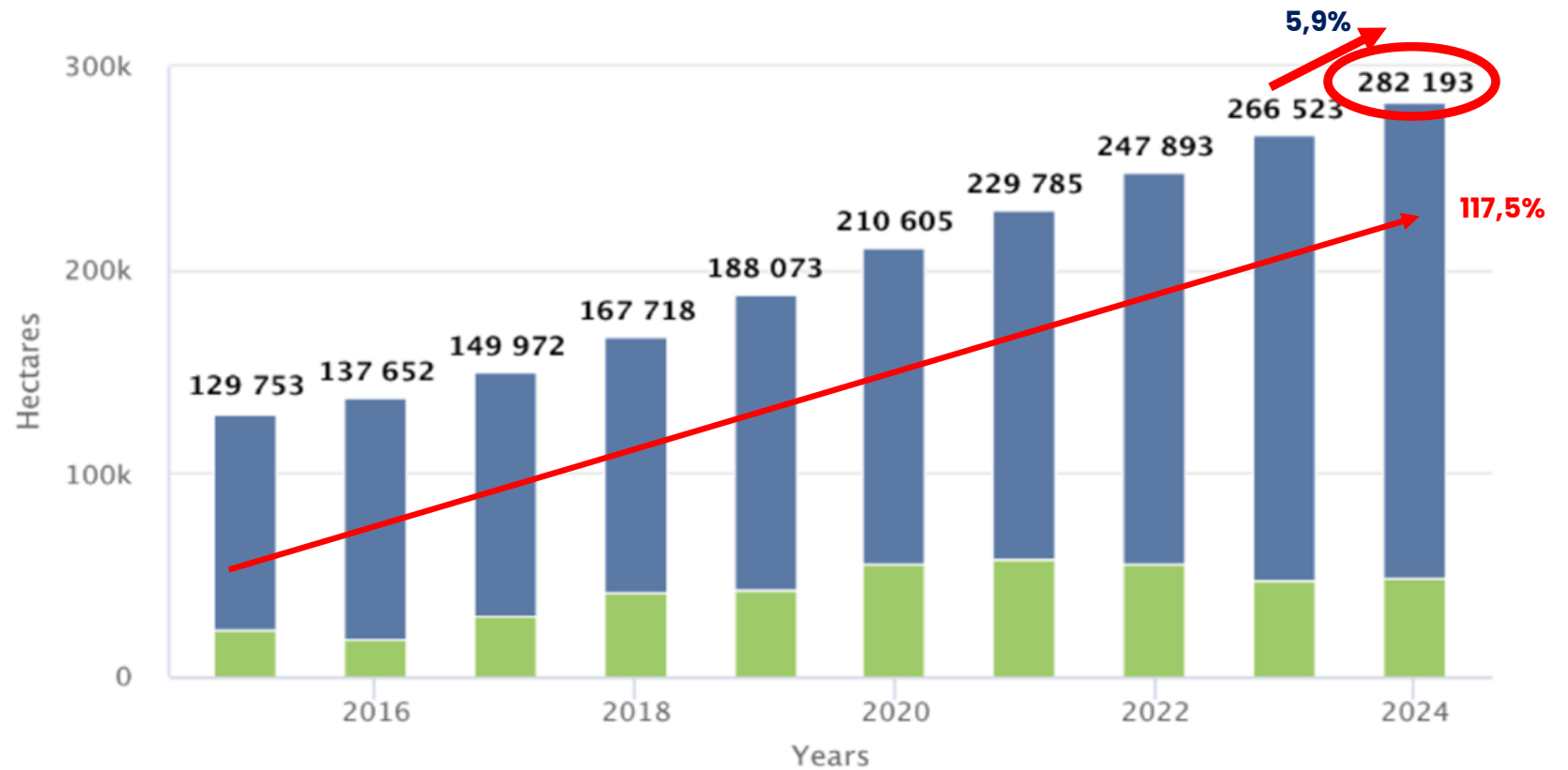
PRODUCTION MAP BY COUNTRY

2025 Global Cultivated Production by Country



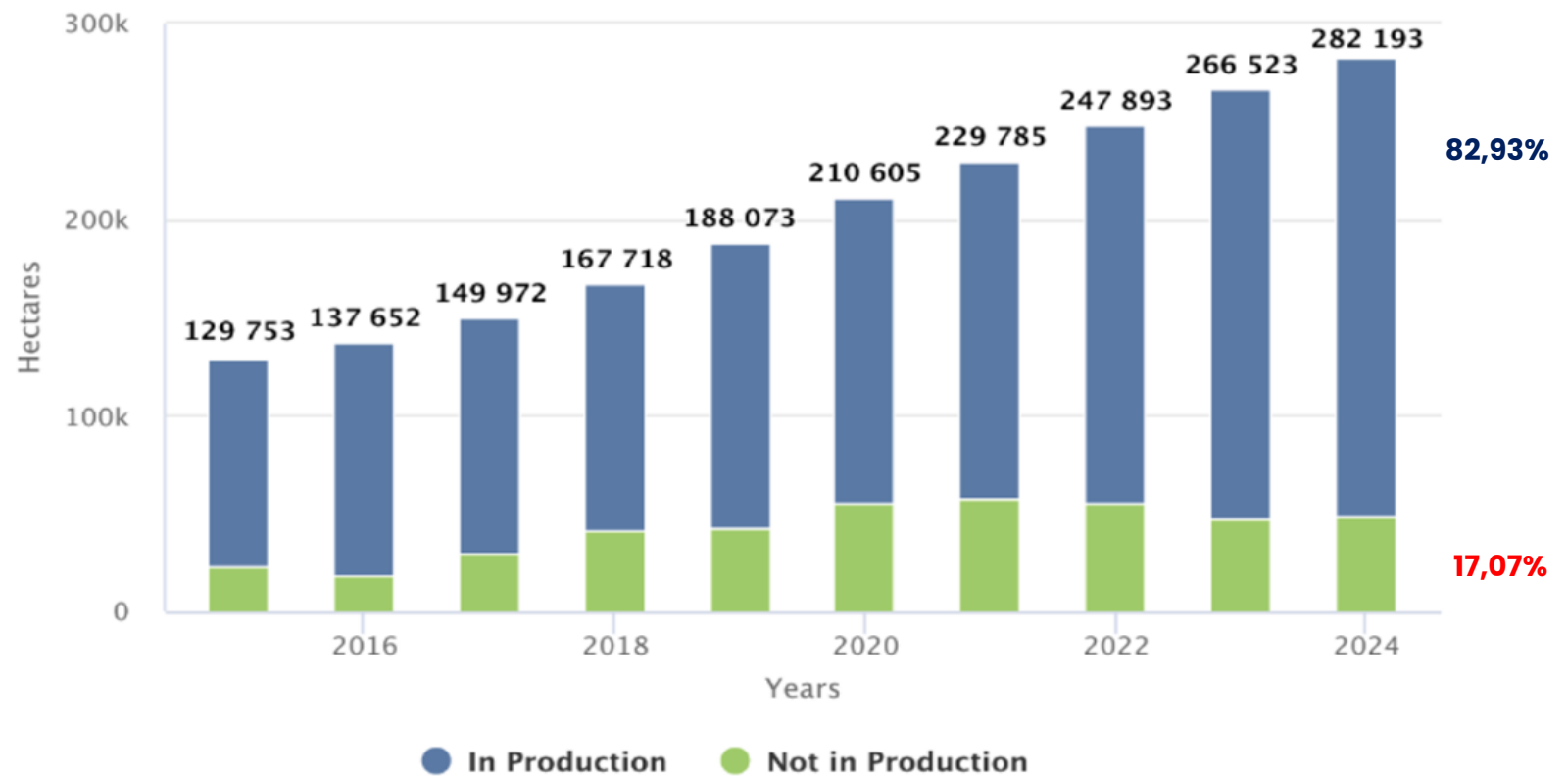


GLOBAL CULTIVATED HECTARES



GLOBAL CULTIVATED HECTARES BY STATUS

Global Cultivated Hectares by Status

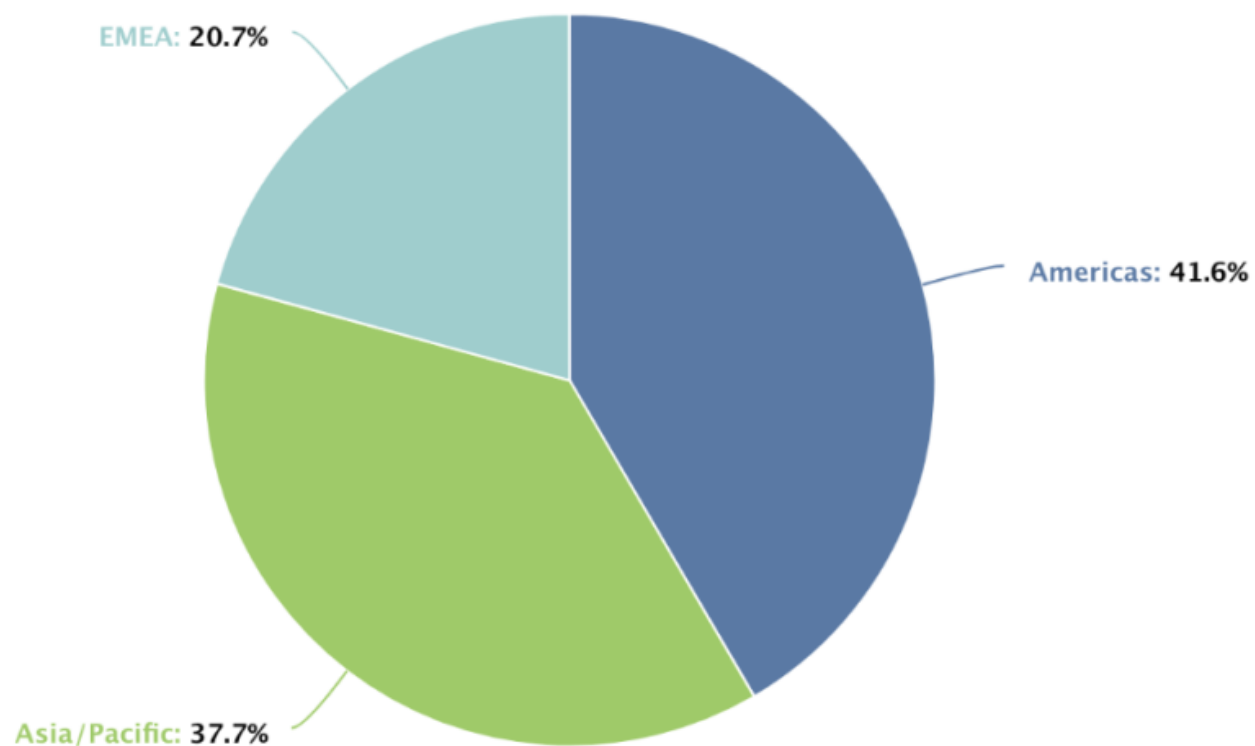


Estimated 17.07% of 2024 Hectares Planted are not in commercial production Down from 17.60% in 2023

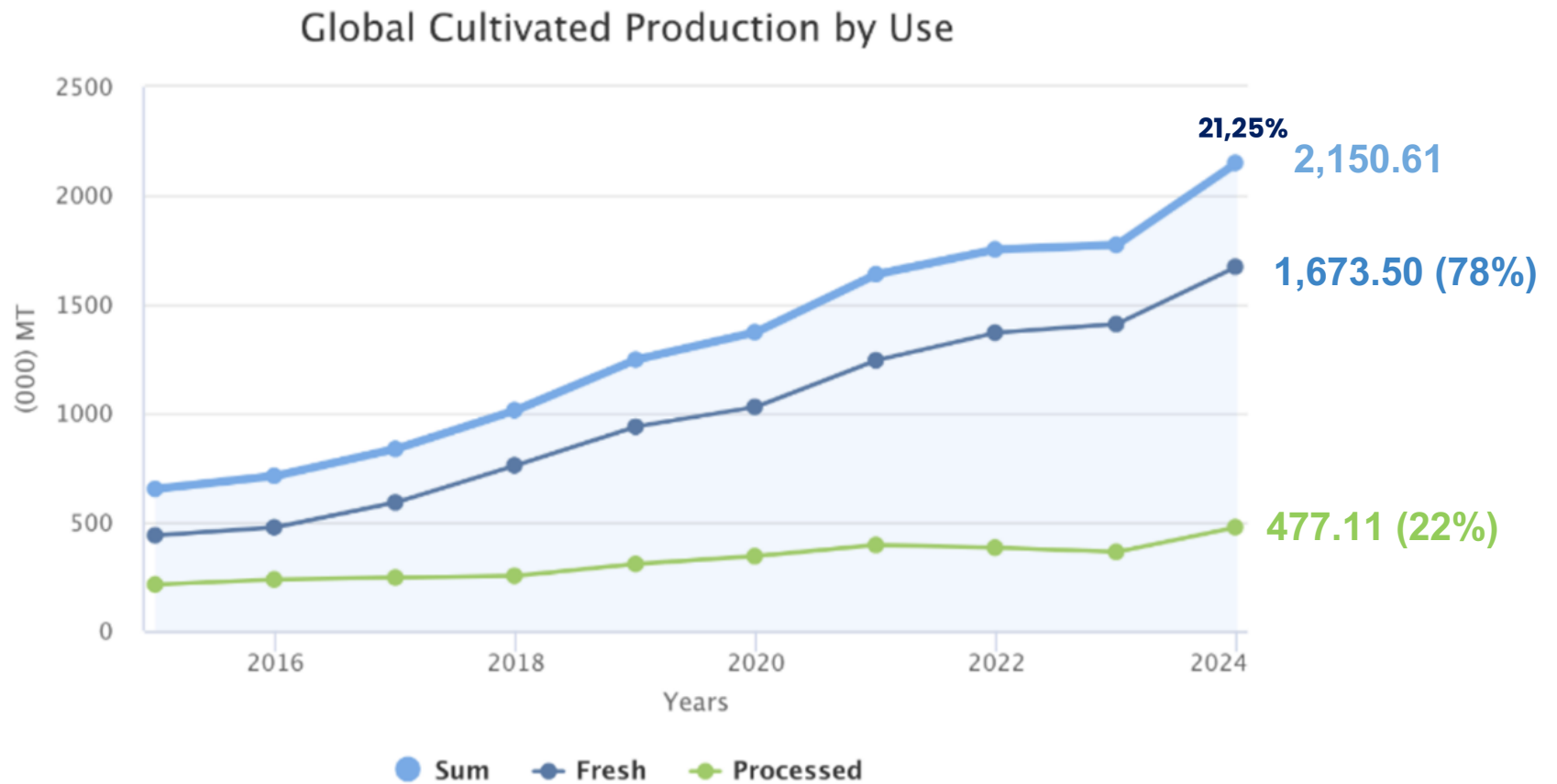


GLOBAL CULTIVATED HECTARES

2024 Global Cultivated Hectares by Region



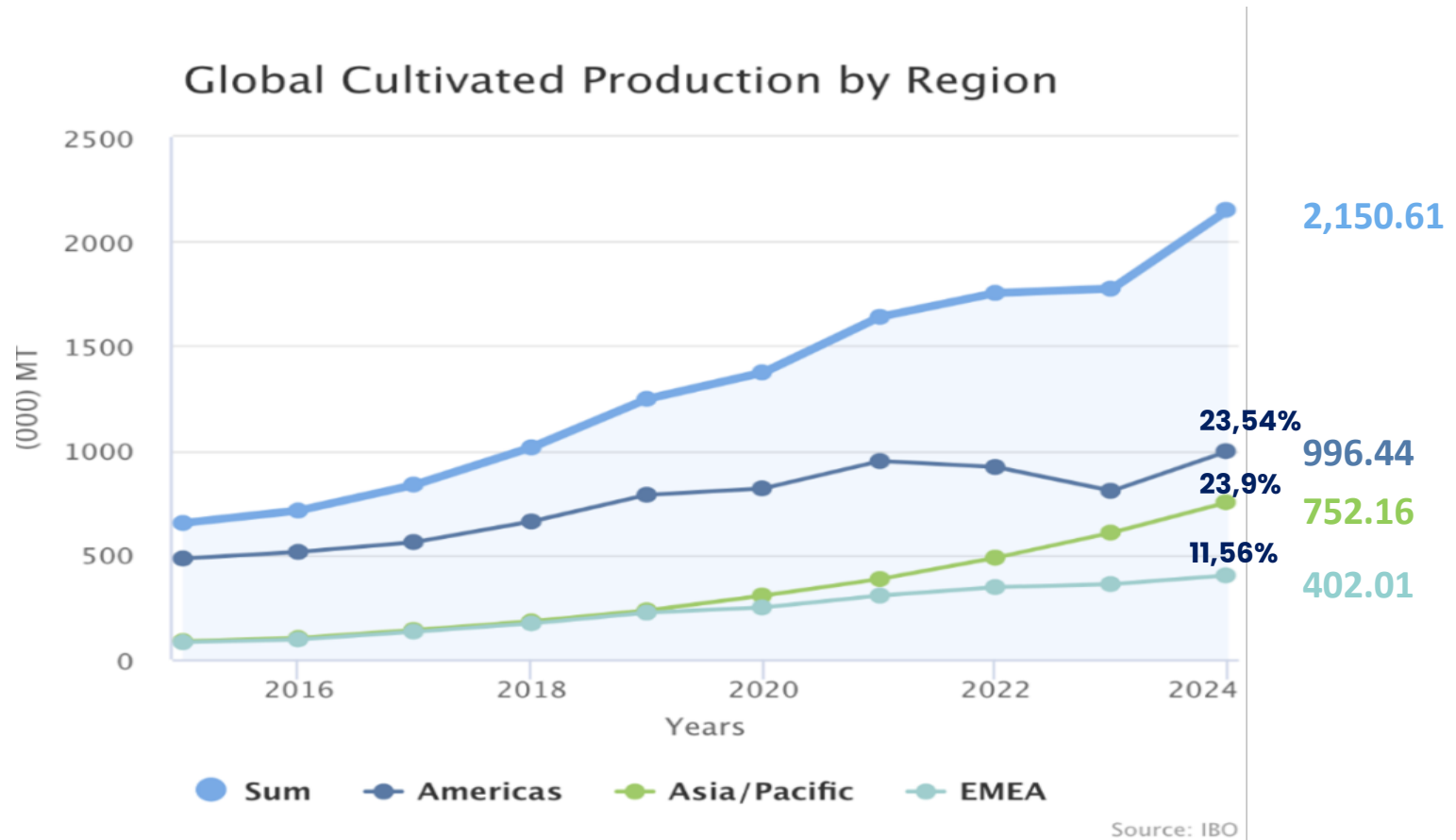
GLOBAL CULTIVATED PRODUCTION BY USE



In 2024 an estimated 22% of production went to the processed industry, compared to 20,5% from 2023



GLOBAL CULTIVATED PRODUCTION BY REGION

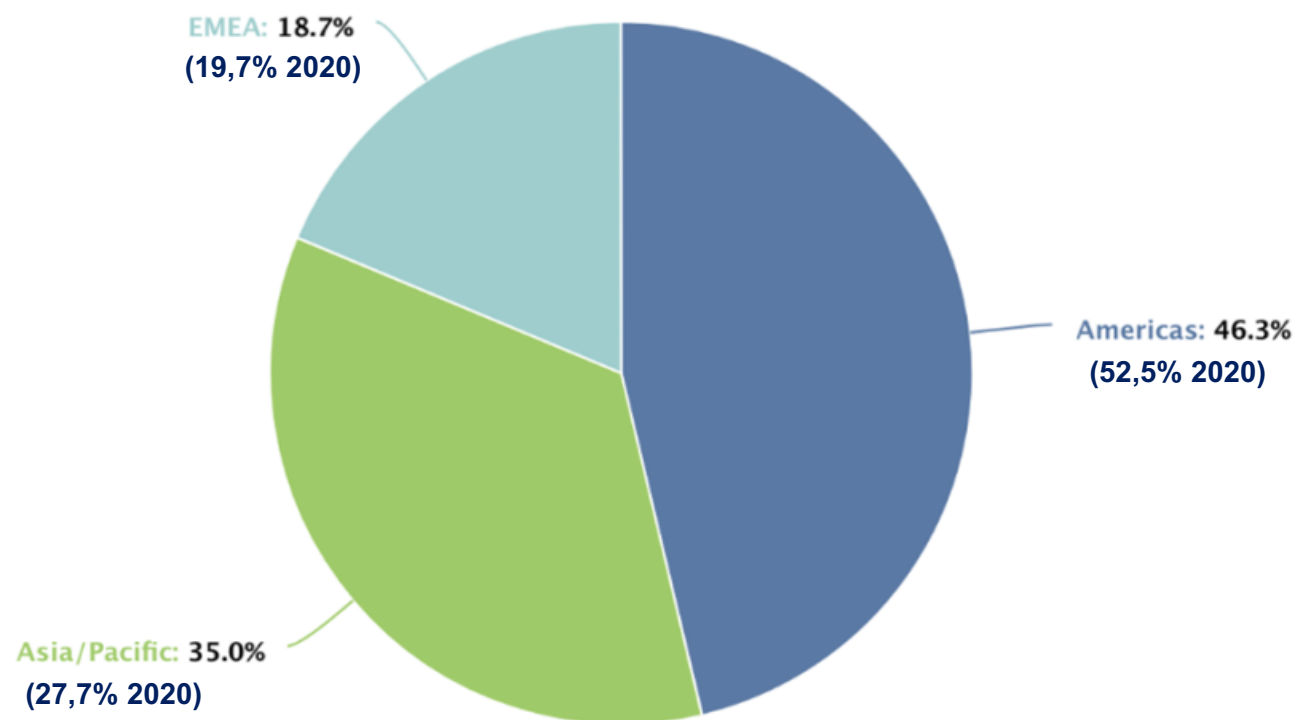


In 2024 an estimated 2,150.61 (000) MT were produced – Fresh & Processed



GLOBAL PRODUCTION

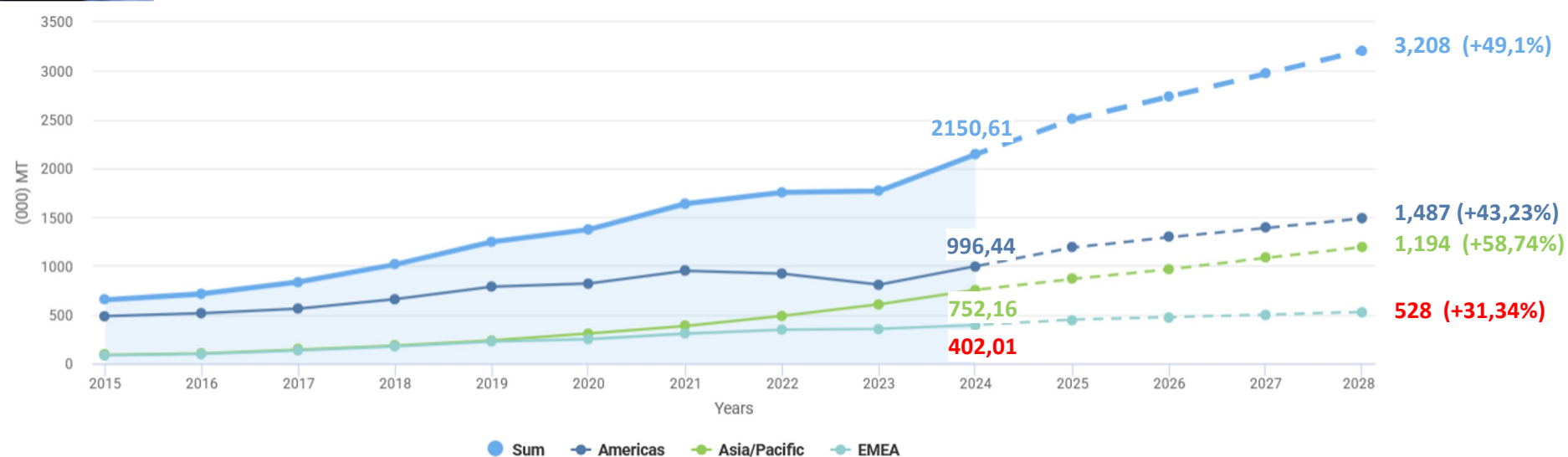
2024 Global Cultivated Production by Region



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



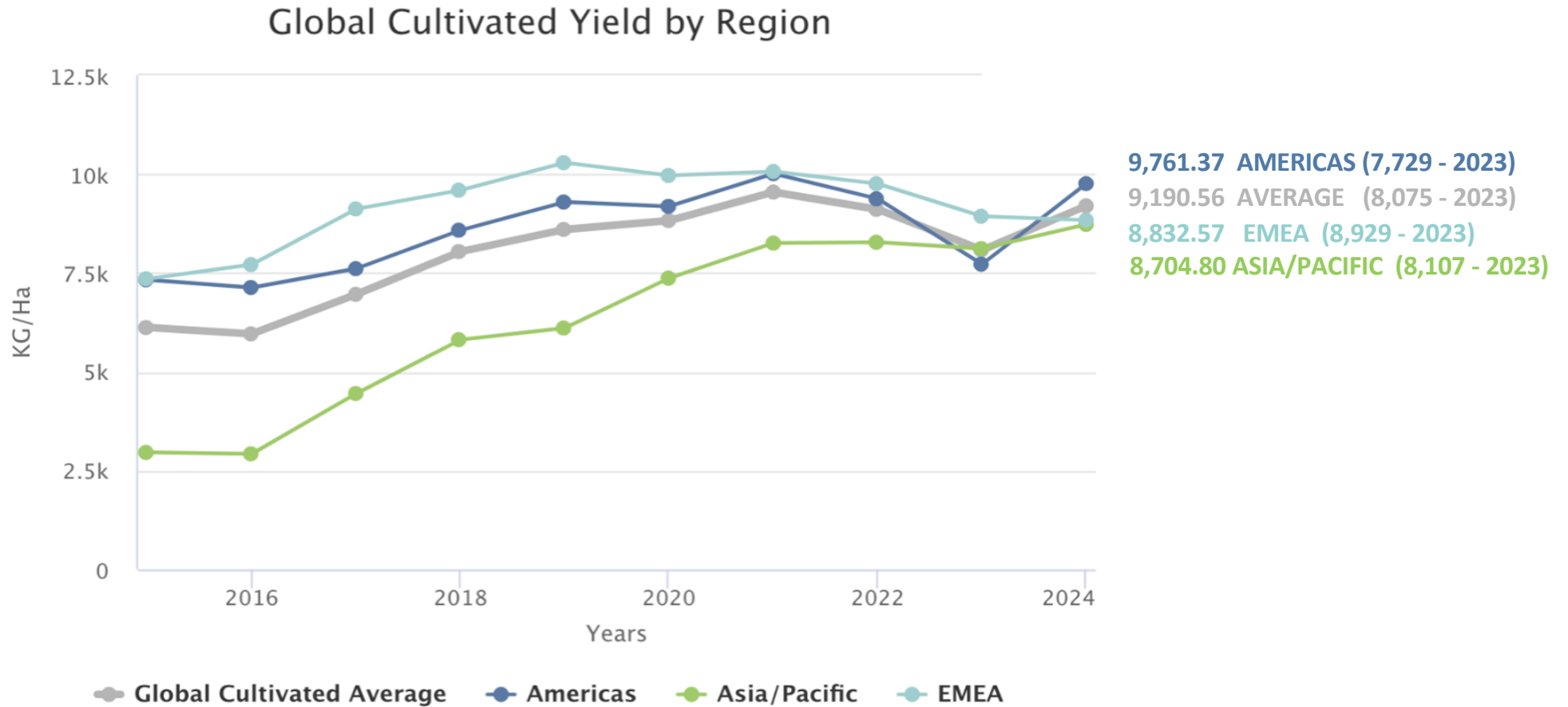
GLOBAL CULTIVATED PRODUCTION PROJECTIONS BY REGION



Source: IBO and Agronometrics

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

GLOBAL CULTIVATED YIELDS BY REGION



Source: IBO and Agronometrics

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



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

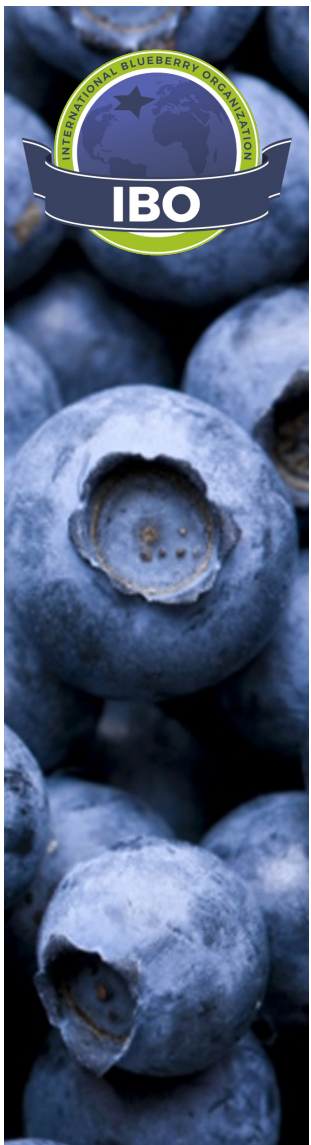


TOP 10 FRESH CULTIVATED IMPORTS BY COUNTRY

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

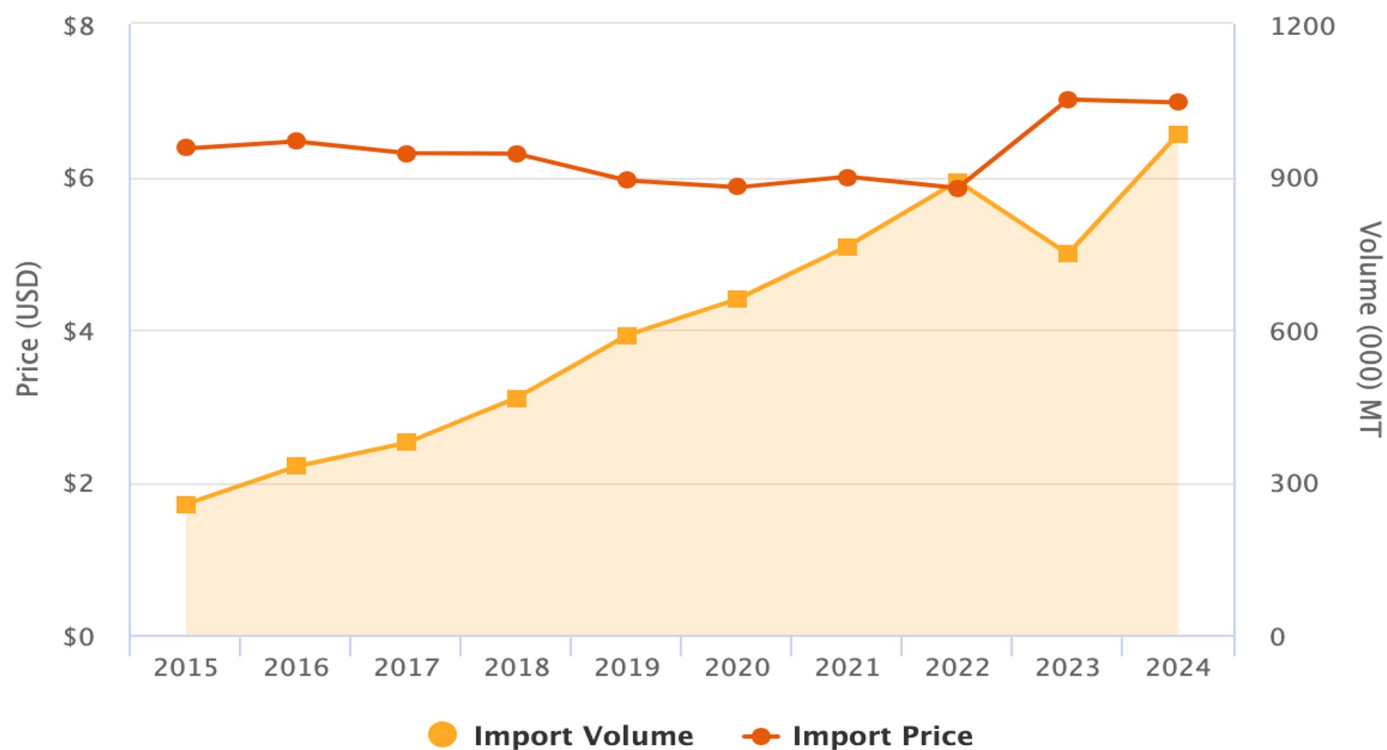


GLOBAL PRICING TRENDS



GLOBAL CROSS BORDER PRICING TRENDS – IMPORTS

Global Blueberry Import Volumes and Average Prices

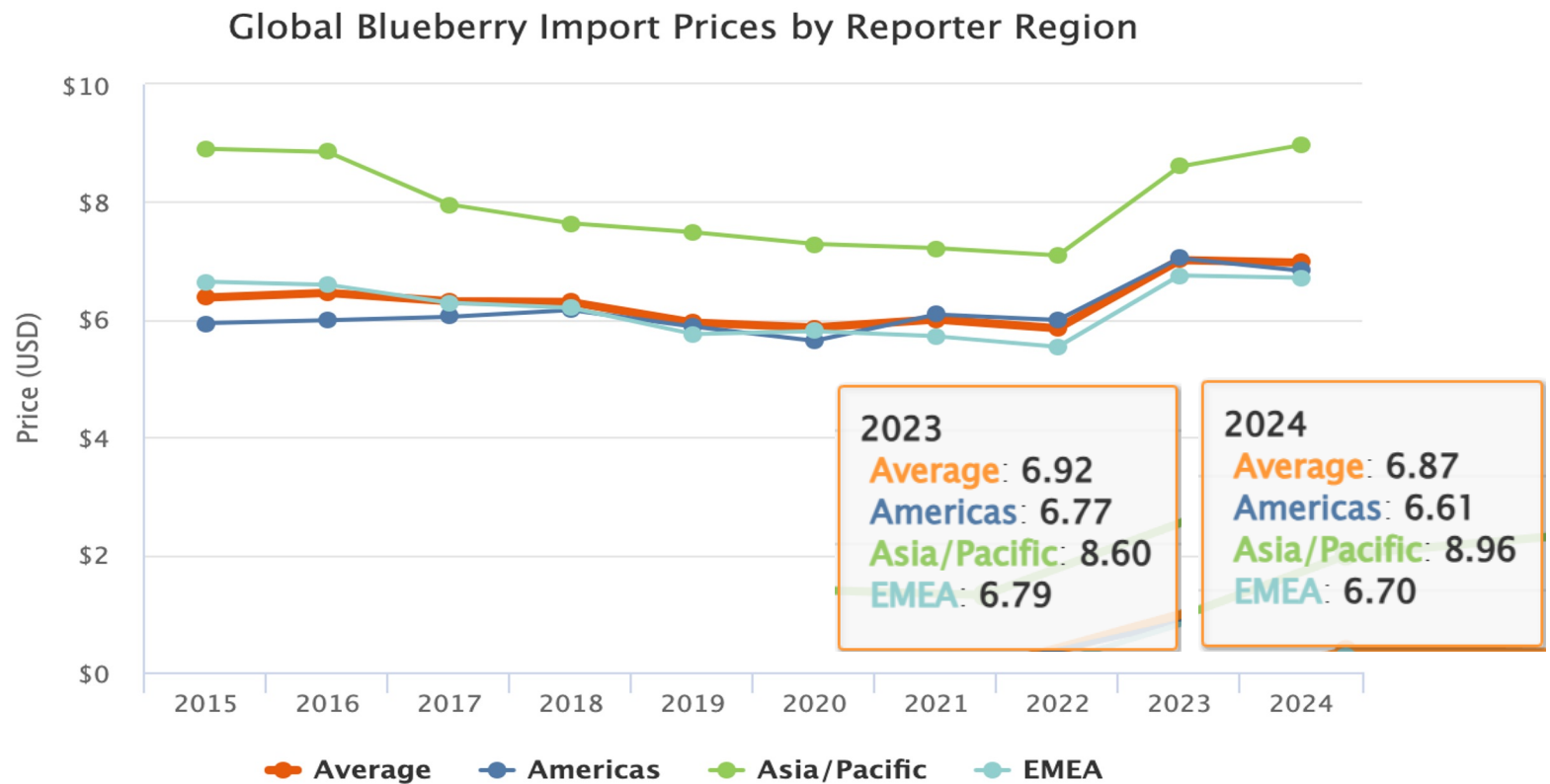


Source: Agronometrics Global Trade Data

- Prices are still high but stabilizing, staying just under \$7/kg — among the highest levels of the past decade.
- Import volumes are recovering, with a strong rebound in 2024, although they are still slightly below the trend.
- Over time, demand has been growing strongly, and in 2024 it grew faster than imports.



PRICING TRENDS BY REGION



Source: Agronomics Global Trade Data

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

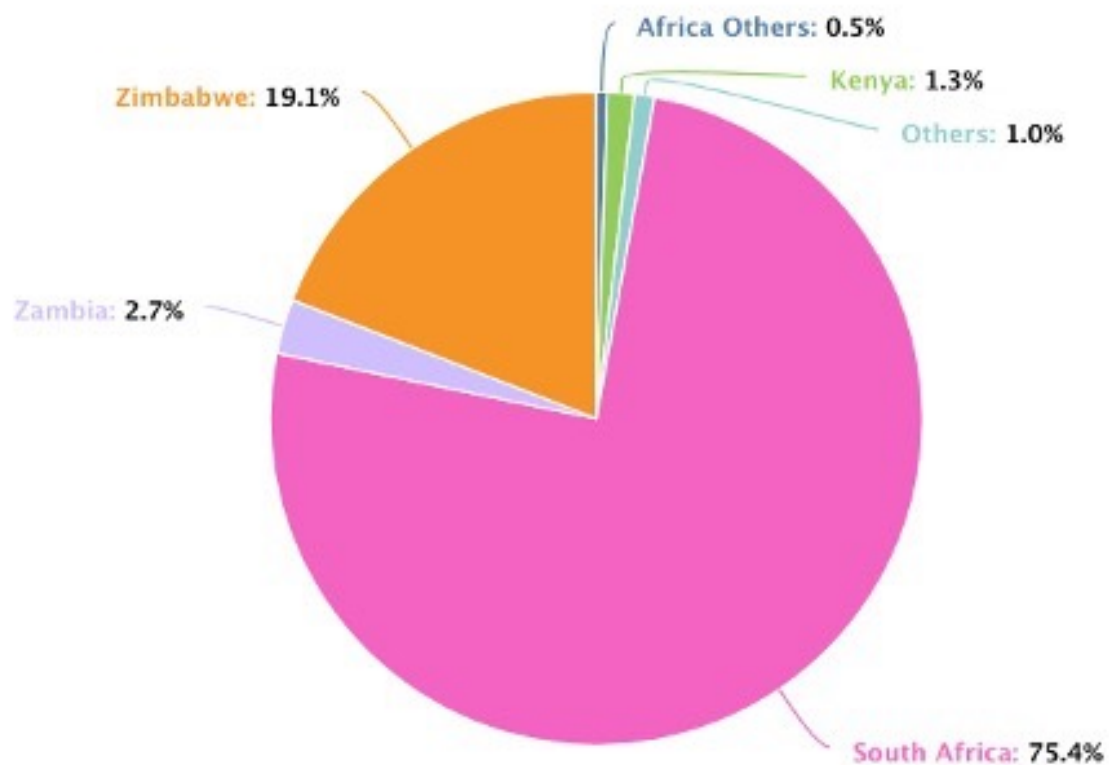


AFRICA & MOROCCO



AFRICA CULTIVATED HECTARES BY COUNTRY

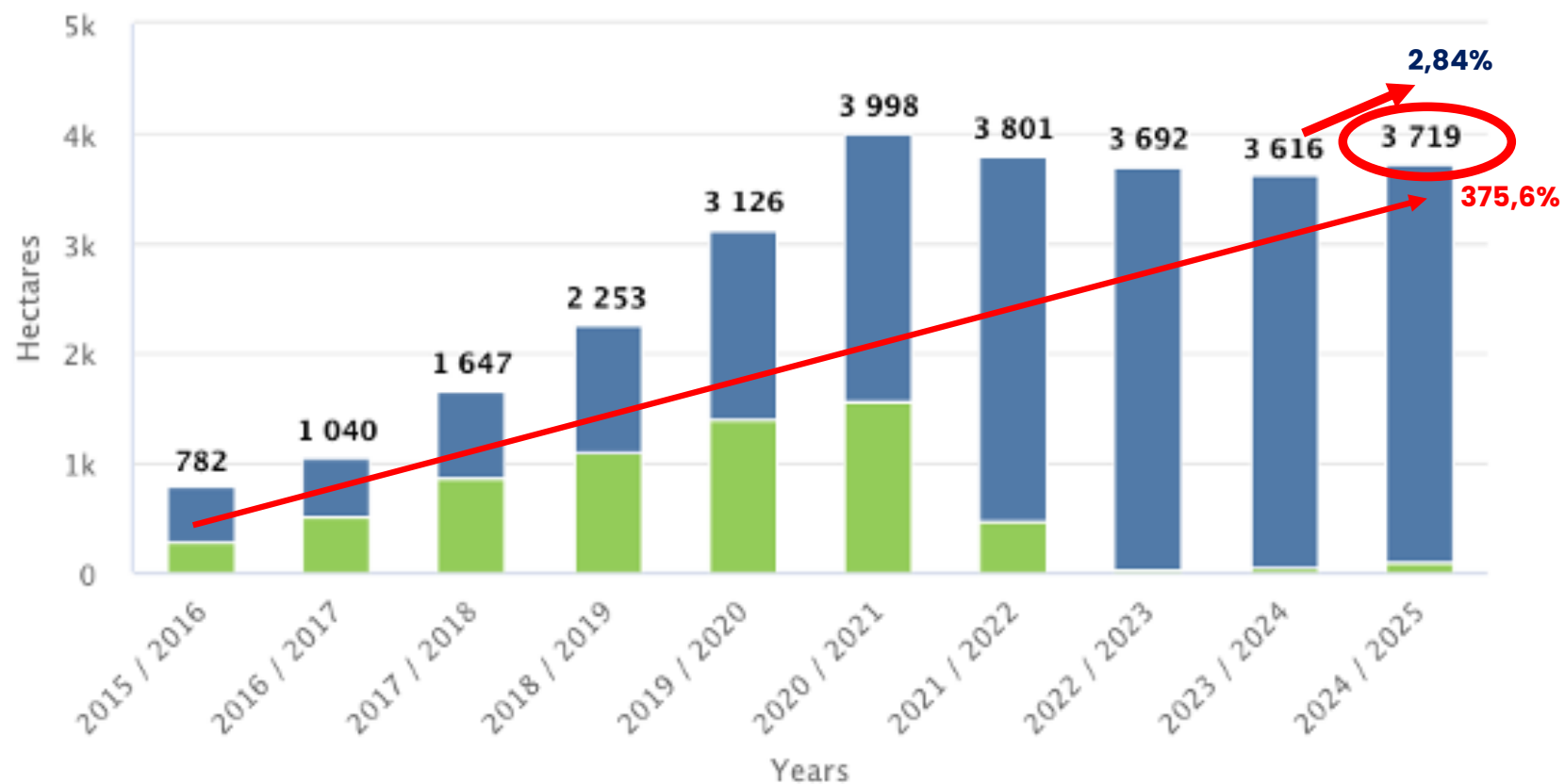
2024/2025 Africa Cultivated Hectares by Country



Primary destination: Western & Central Europe. Fast-growing markets: Asia and the Middle East

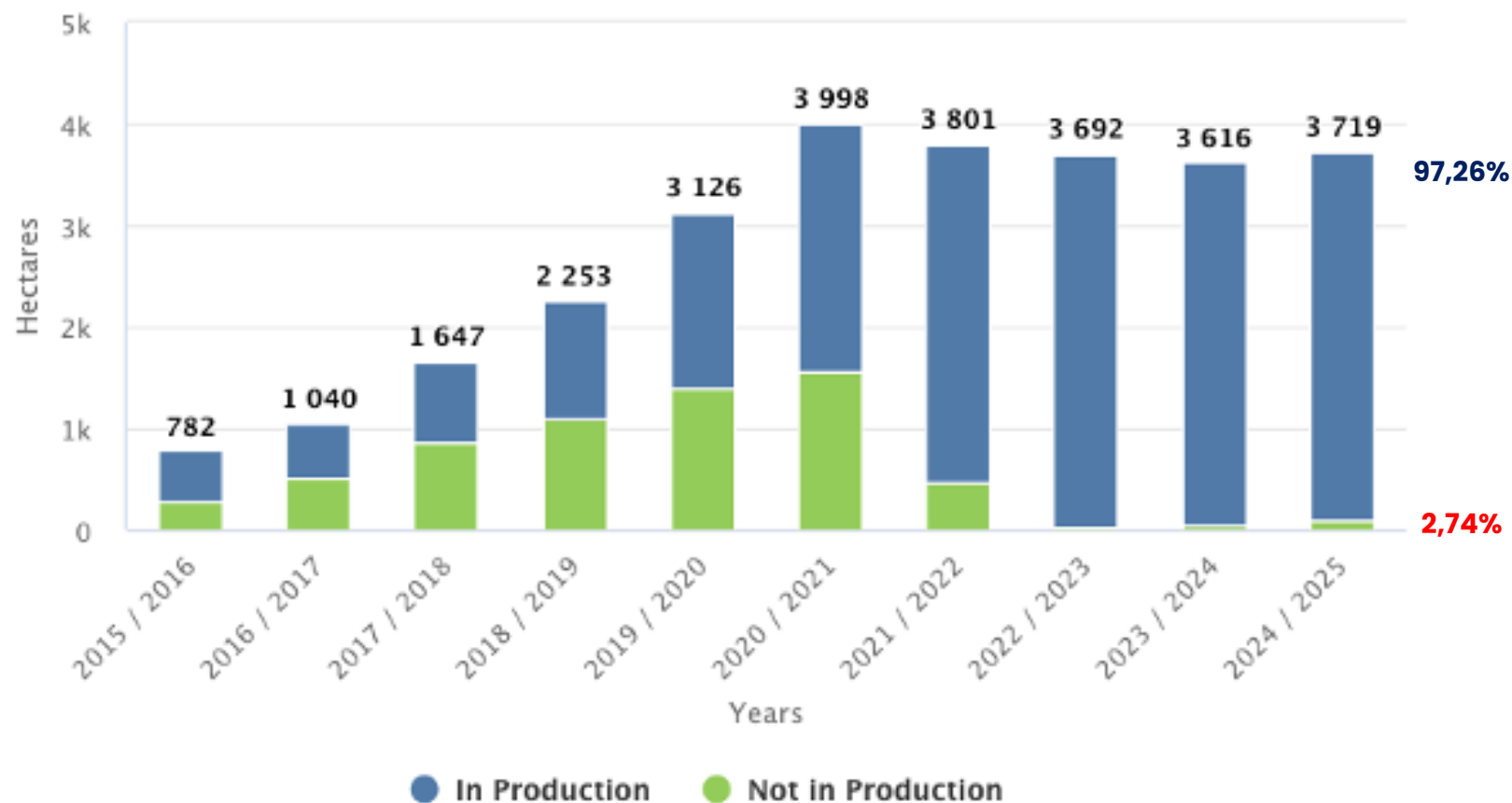


AFRICA CULTIVATED HECTARES BY STATUS



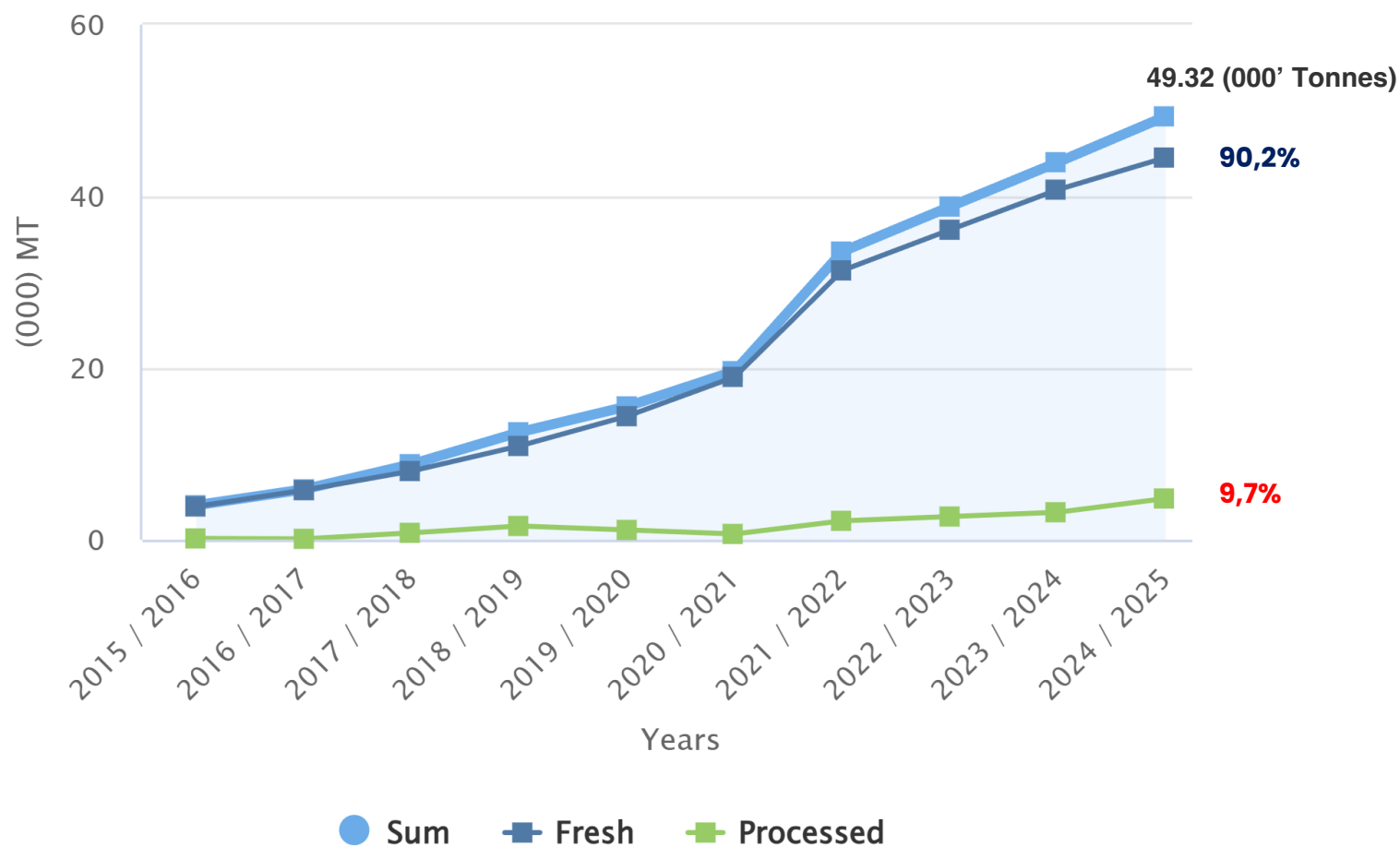


AFRICA CULTIVATED HECTARES BY STATUS



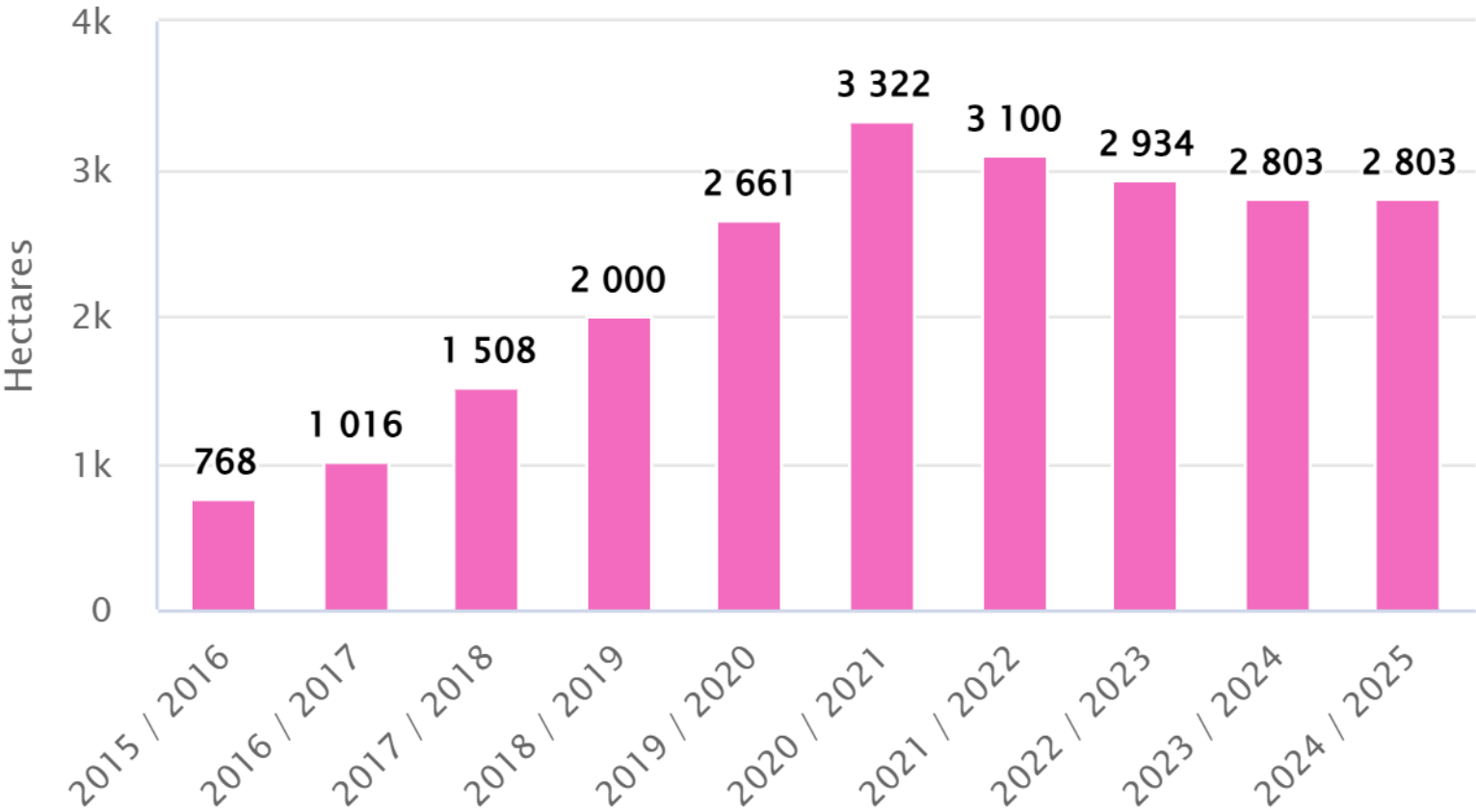


AFRICA CULTIVATED PRODUCTION BY USE



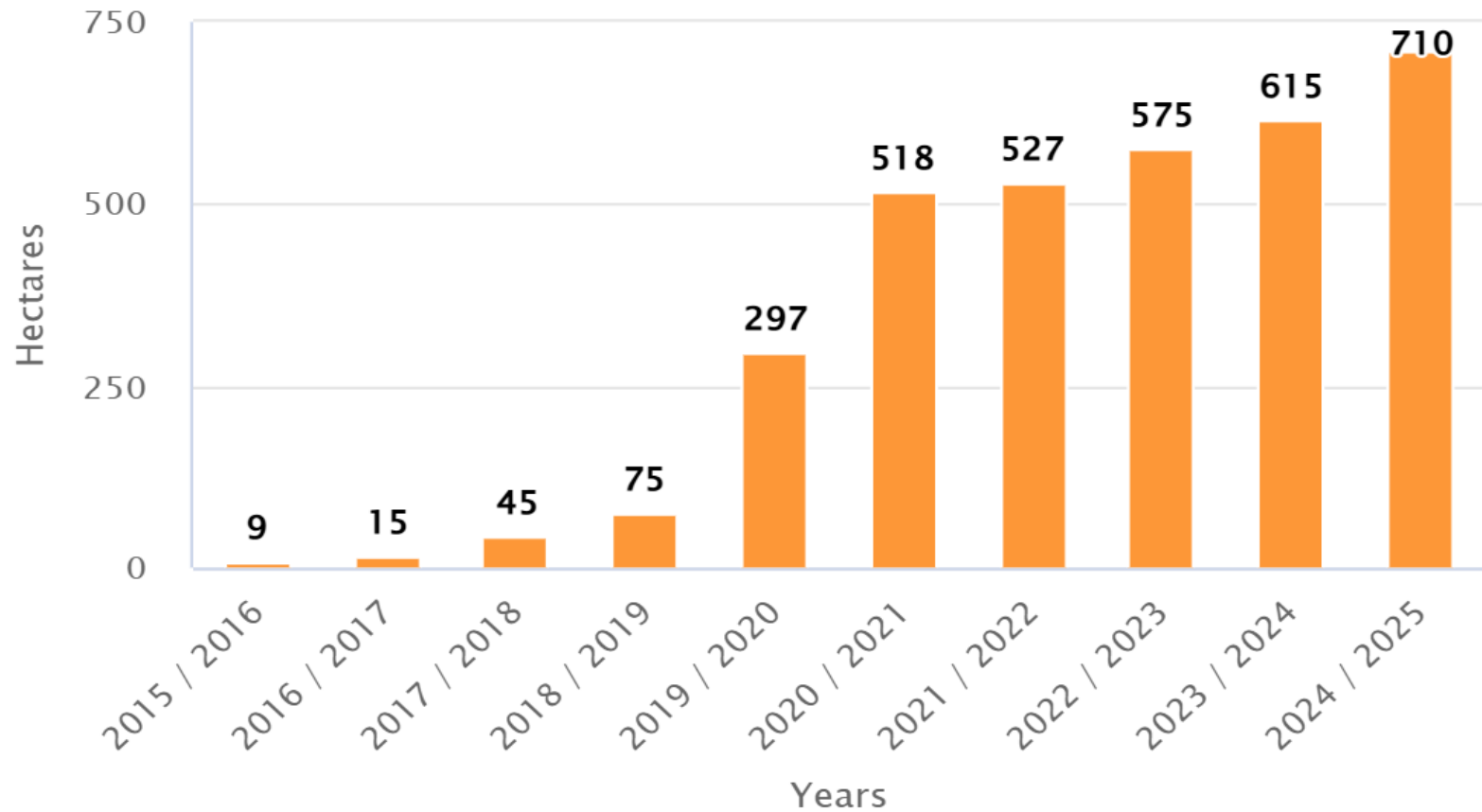


SOUTH AFRICA CULTIVATED HECTARES



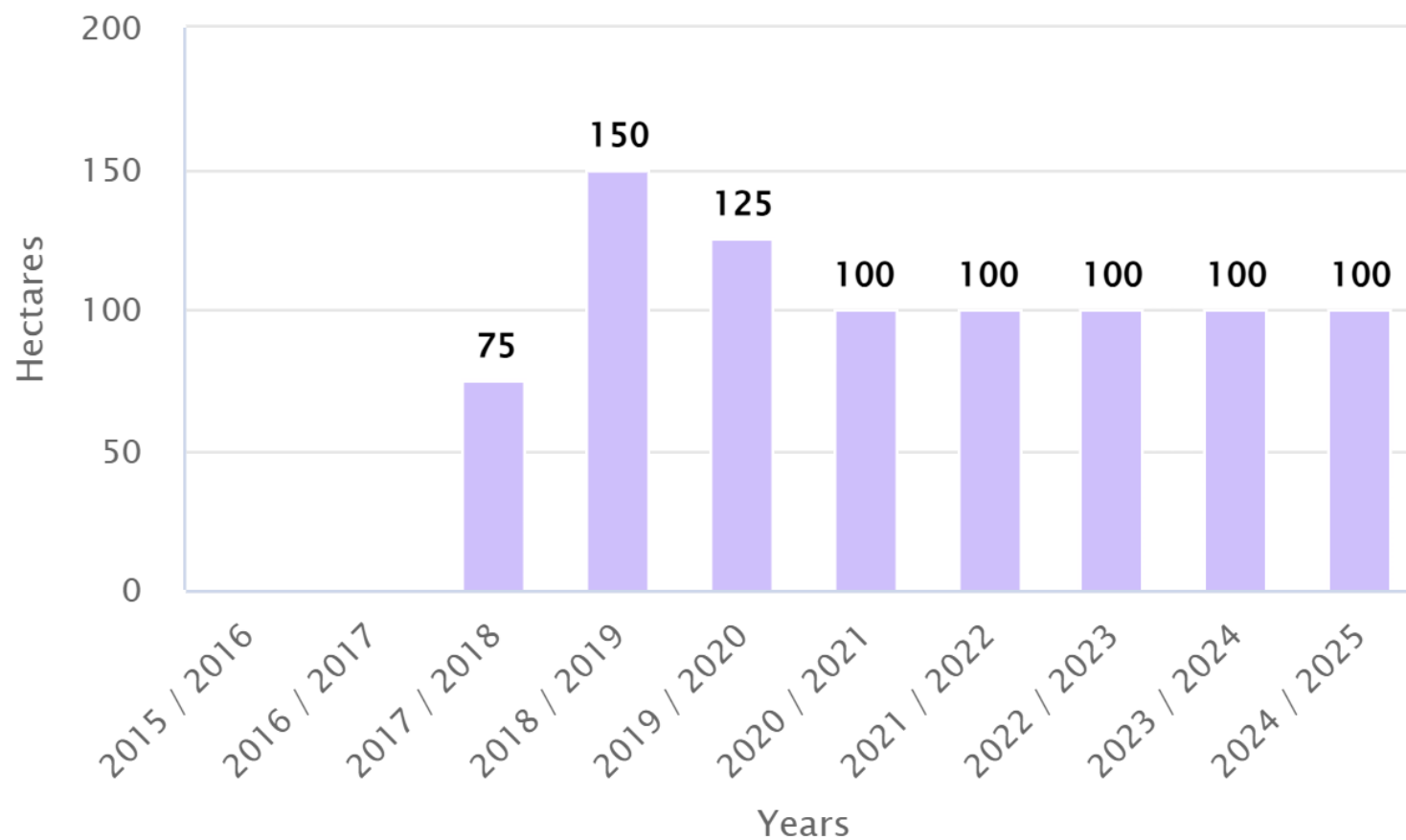


ZIMBABWE CULTIVATED HECTARES TREND



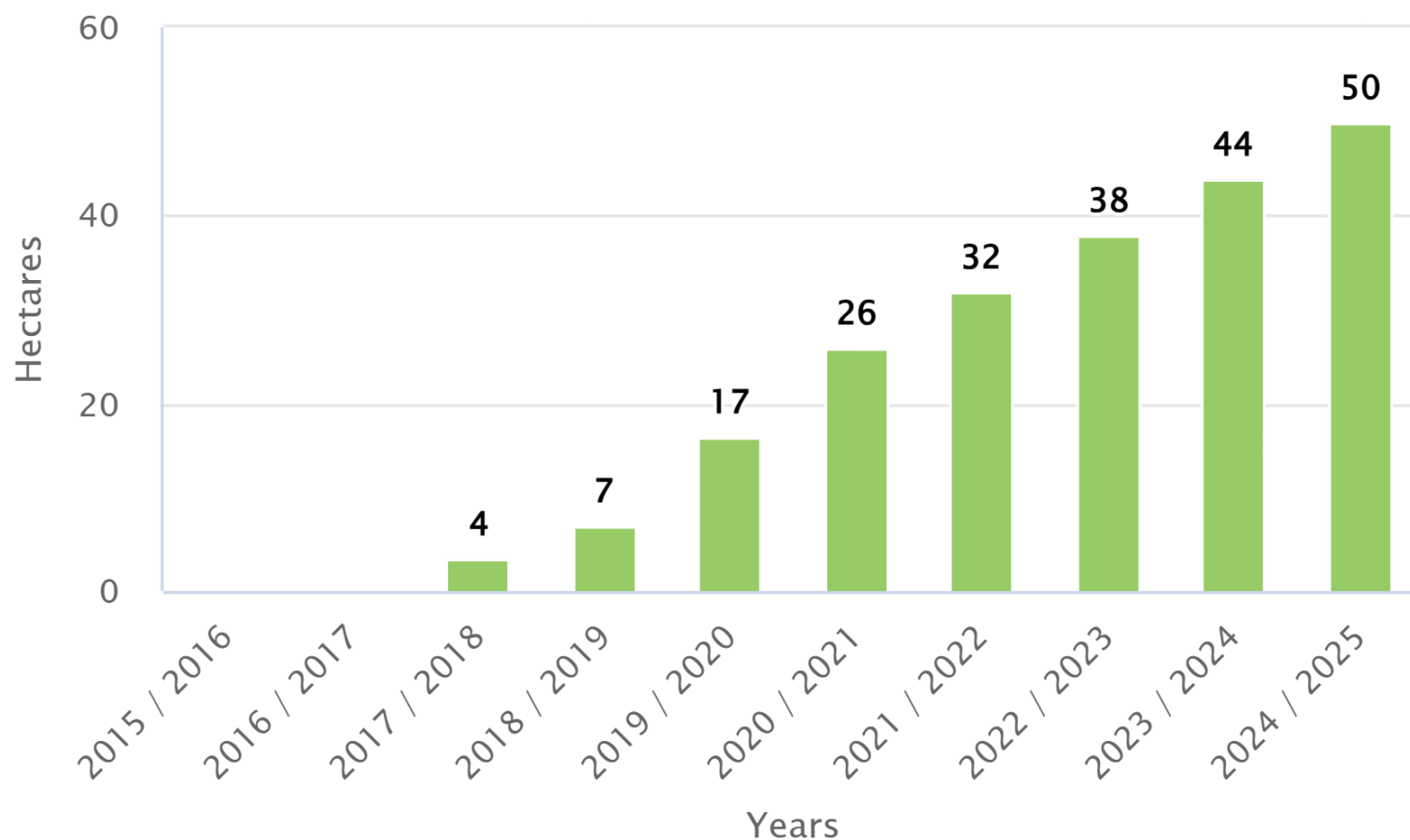


ZAMBIA CULTIVATED HECTARES





KENYA CULTIVATED HECTARES



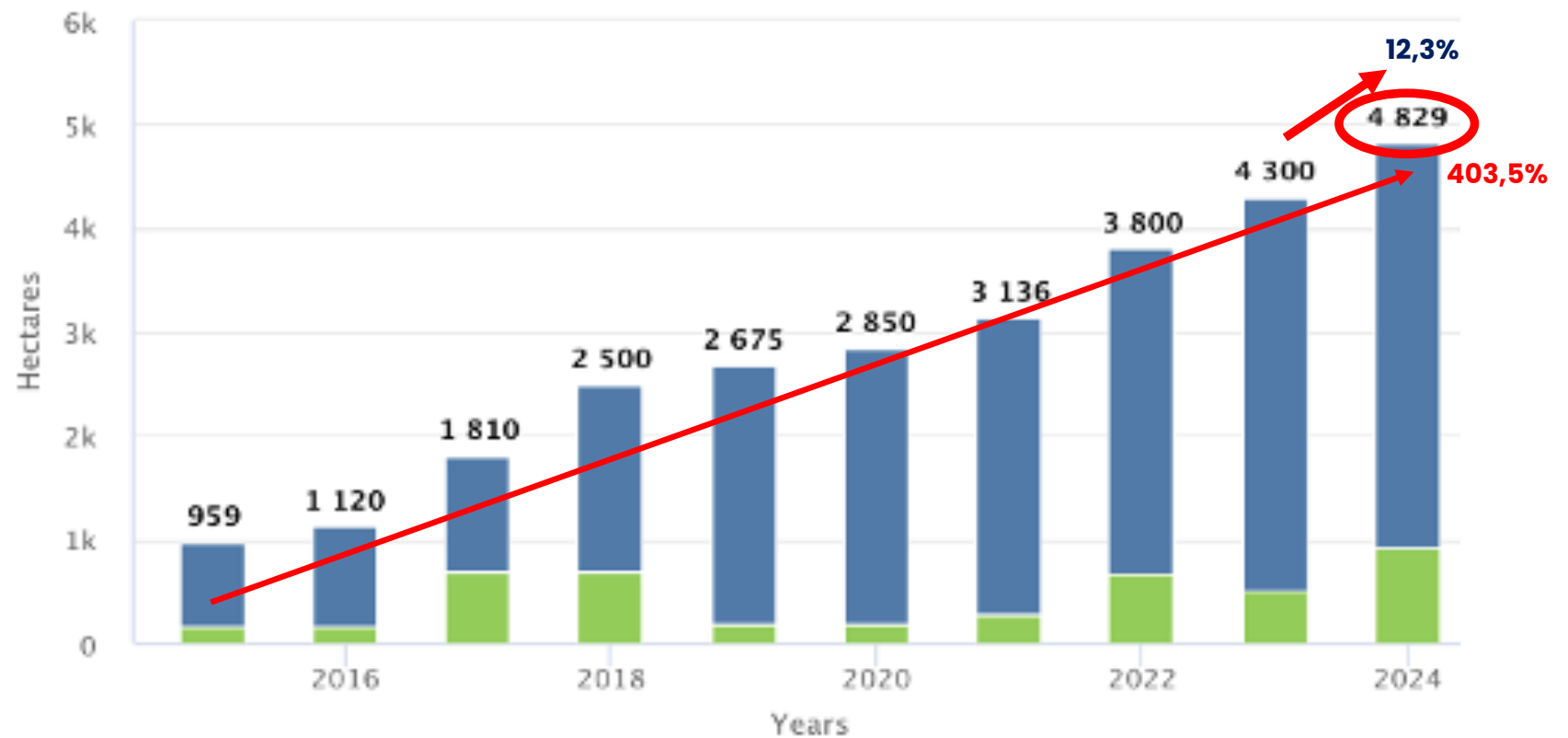


EMERGING AFRICAN ORIGINS

- **Zambia:** Improving agronomy and market interest; potential China access via South African logistics
- **Namibia:** Small but concentrated projects; historic frost risk; genetics renewal underway
- **Kenya:** Equatorial climate offers near year-round potential; trials expanding
- **Regional trend:** Blueberries increasingly viewed as a diversification crop for existing horticultural exporters
- **Common element:** Exploring more direct export routes and attracting new capital investment.
- **A major opportunity for Africa's blueberry industry is its ability to create jobs.**
While other regions face labor shortages, Africa offers strong workforce potential that supports industry growth and local economic development.



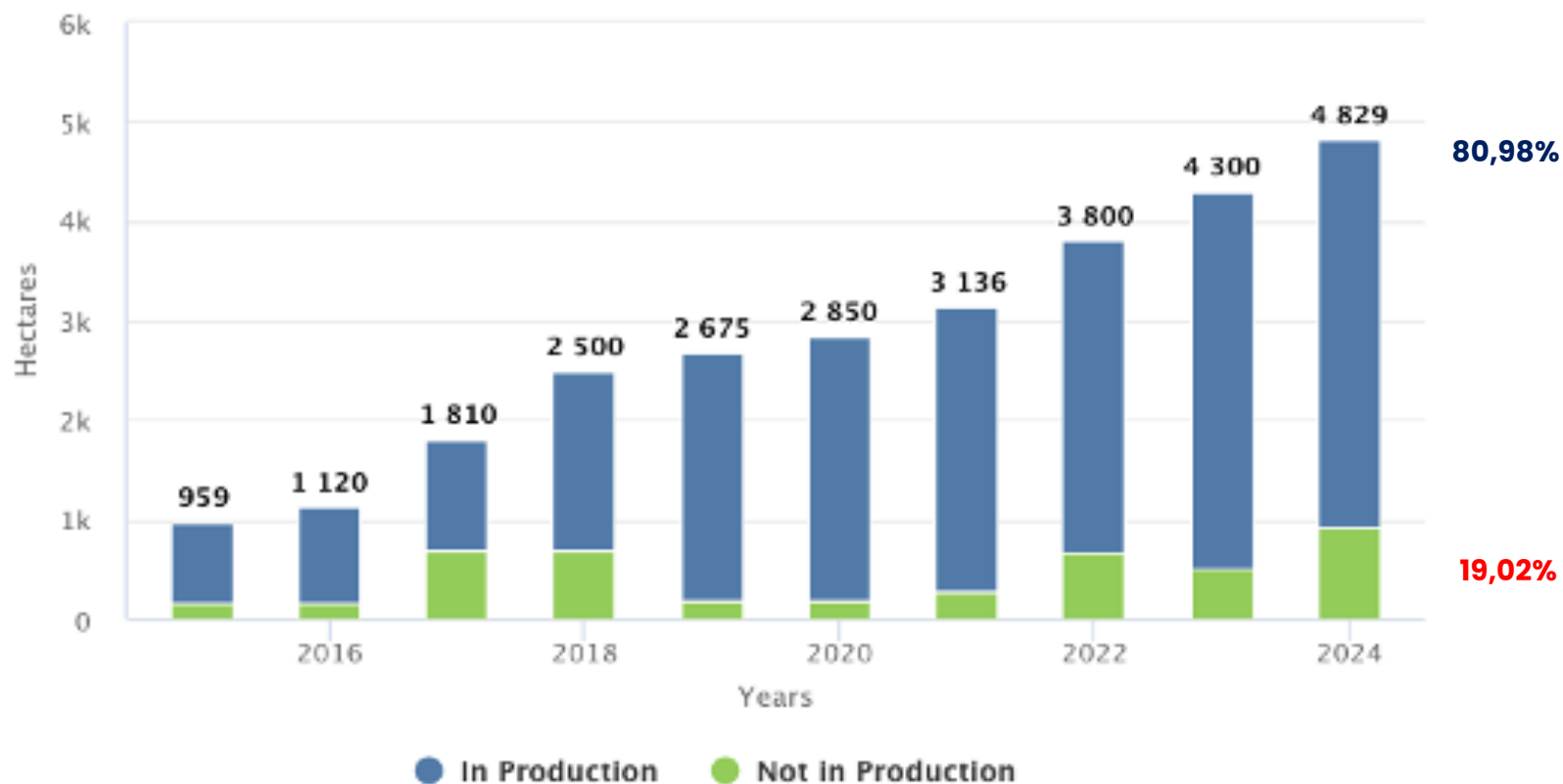
MOROCCO'S EXPANDING BLUEBERRY FOOTPRINT





MOROCCO'S EXPANDING BLUEBERRY FOOTPRINT

Morocco Cultivated Hectares by Status

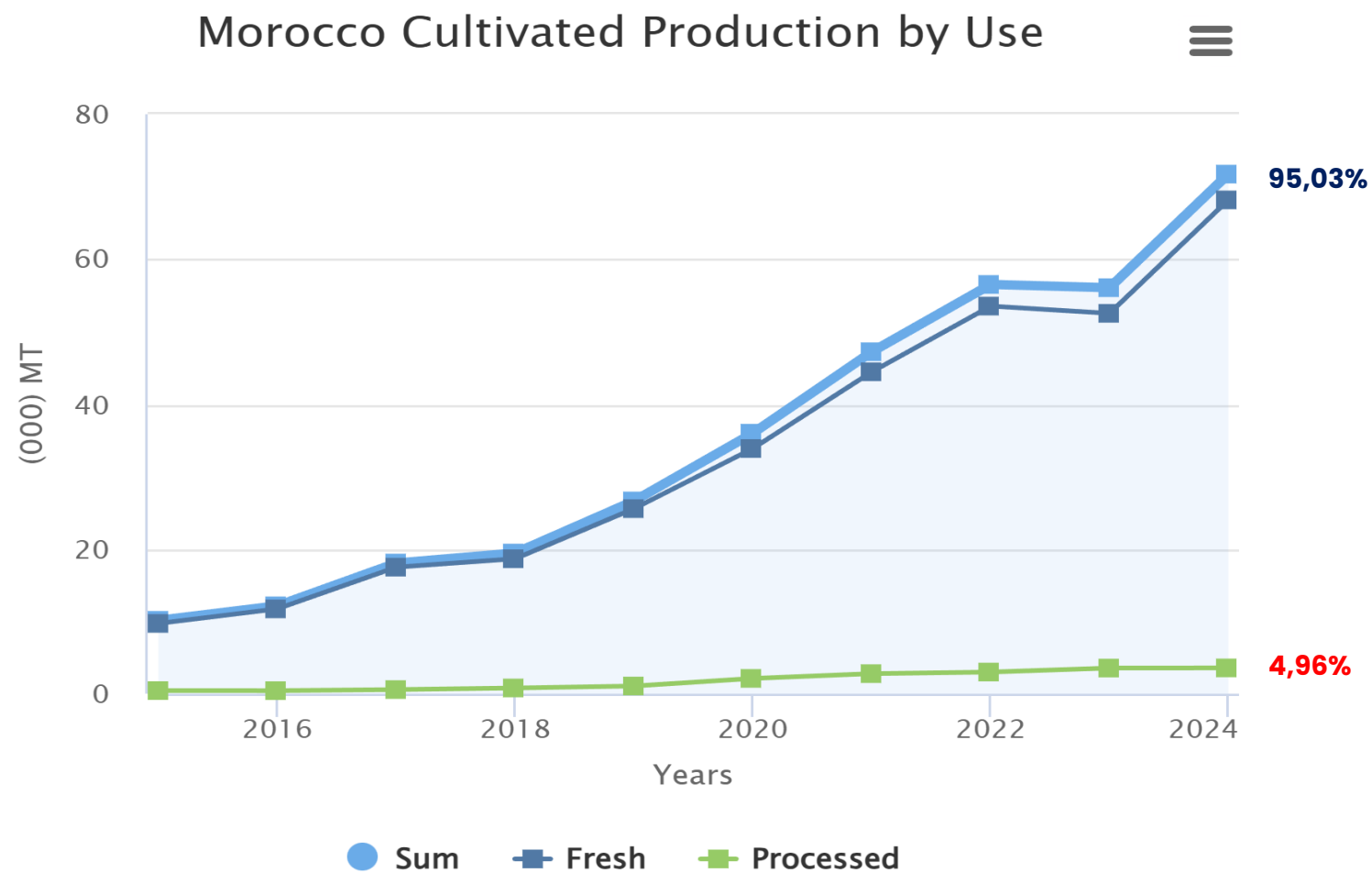


Source: IBO

Production (fresh): 71.7K MT. Yield: 18,343 kg/ha

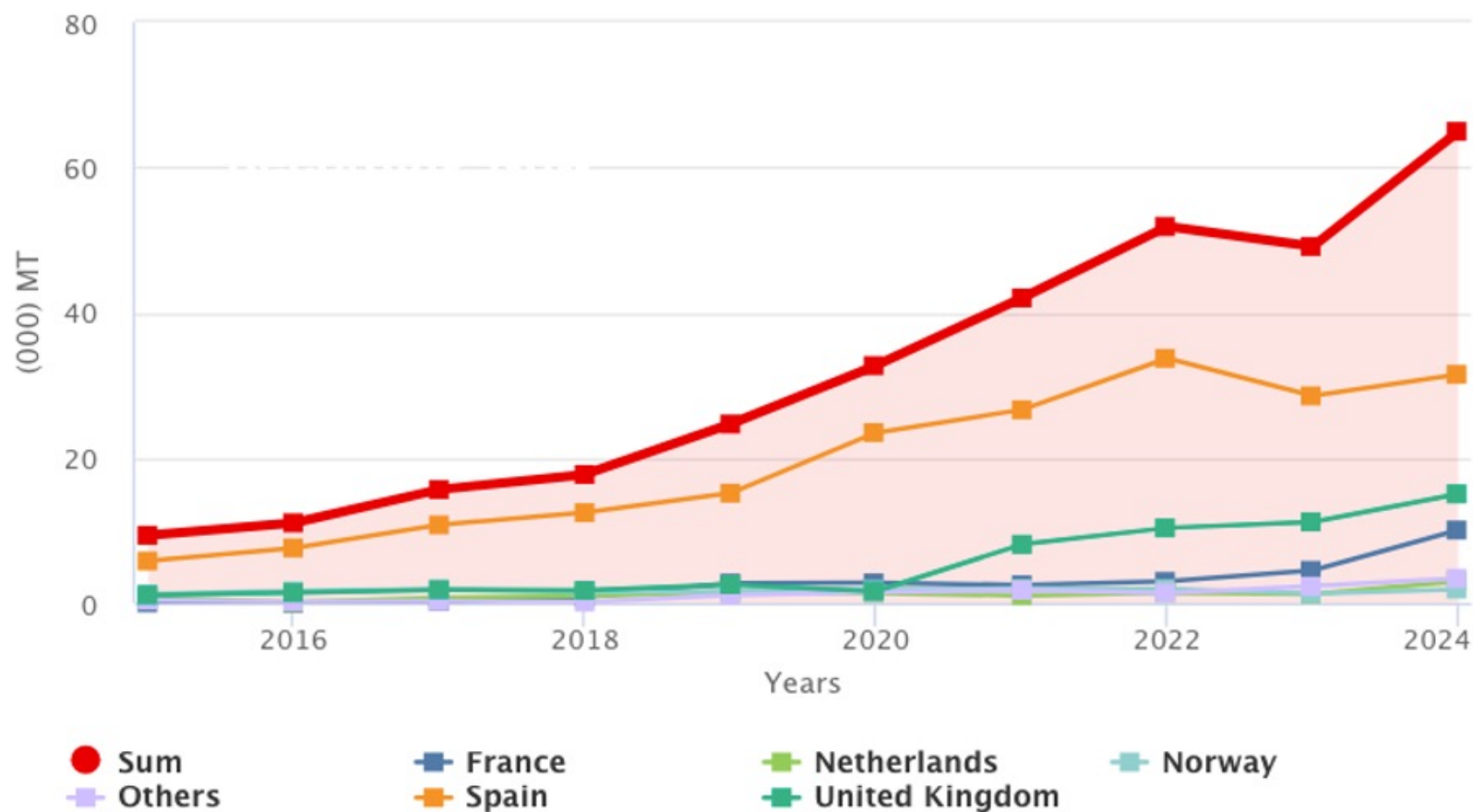


MOROCCO'S CULTIVATED PRODUCTION BY USE

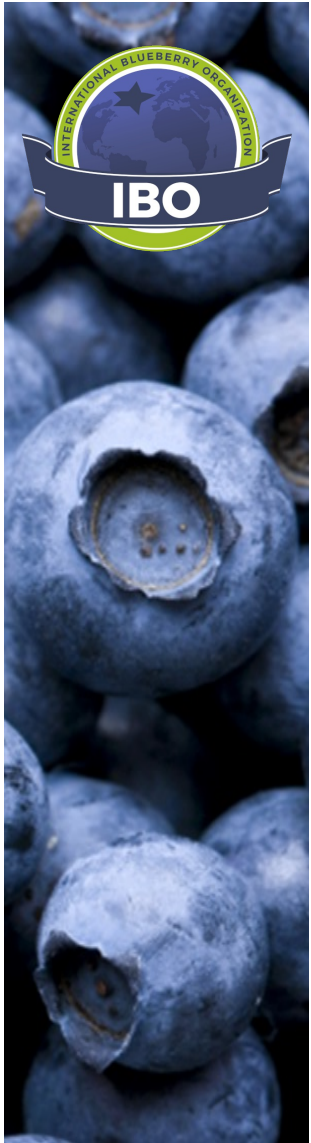




MOROCCO'S EXPORTS 2024/25 – TOP DESTINATIONS

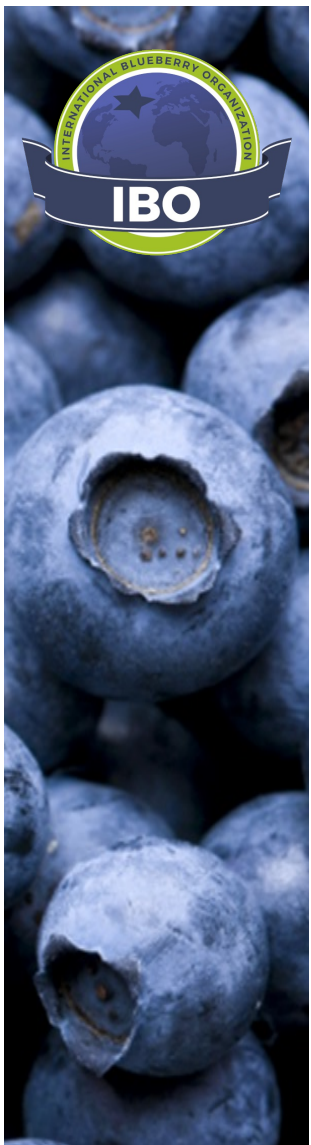


Source: Agronometrics Global Trade Data

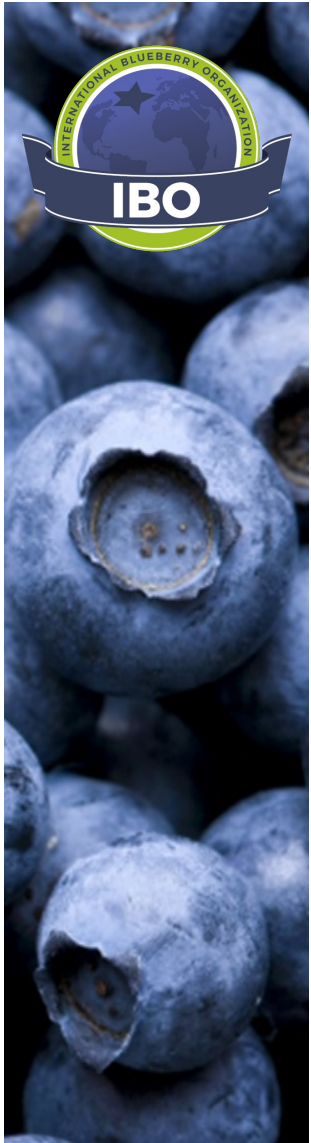


MOROCCO OUTLOOK 2025–2030

- **Set to become a key winter–spring supplier for the European market**
- **Yields expected to keep improving as young plantings mature**
- **Further expansion anticipated in Agadir and Dakhla, especially for early fruit**
- **Potential new market access with China and other Asian destinations**
- **Greater use of proprietary genetics to boost quality and size**
- **Logistics and water security supported by continued infrastructure improvements**

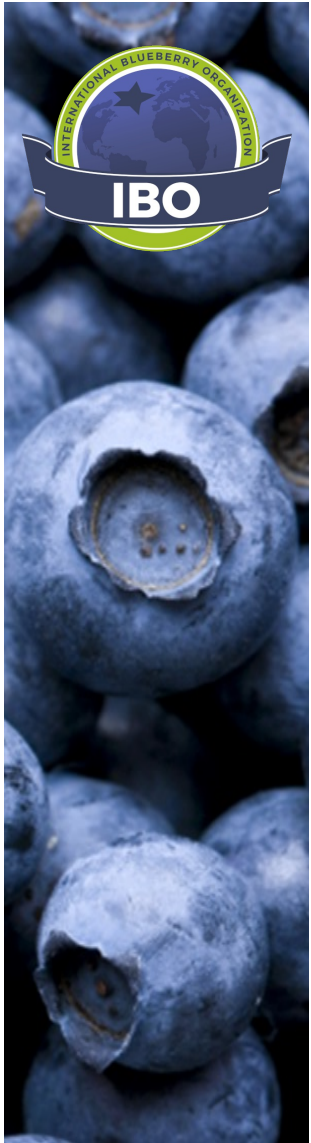


GLOBAL INDUSTRY TRENDS



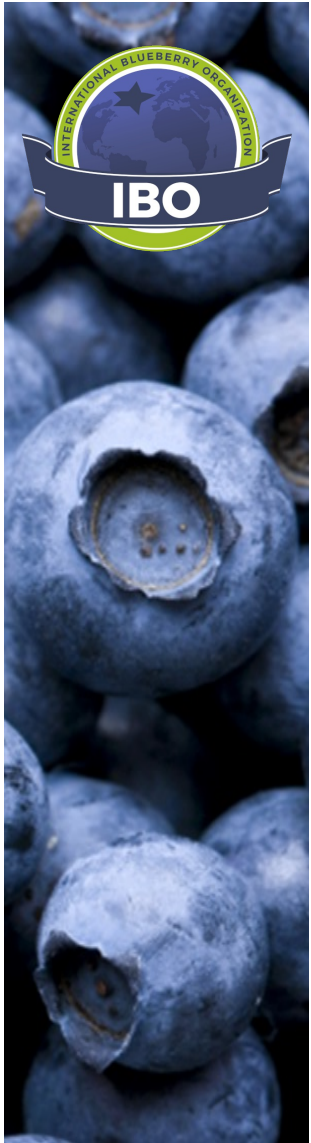
INDUSTRY TRENDS

- Peru, has become the global supply leader, accounts for 1/3 of global fresh blueberry production
- Tariff-driven diversification, with 10% U.S. tariff, its largest export market, is accelerating diversification into Asia, the Middle East, and India
- Most of the blueberry industry's value growth comes from premium fruit, showing that consumers are willing to pay more for higher quality.
- While overall volume and value are growing steadily, future opportunities depend on delivering better quality and creating new ways for consumers to enjoy blueberries.
- Advances in genetics and new growing regions now allow nearly year-round supply of top-quality fruit, though not all growers can keep up with the investment needed.



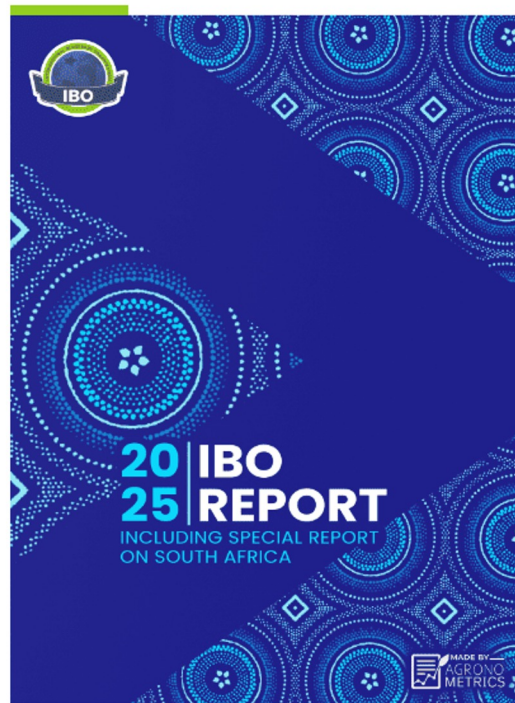
INDUSTRY TRENDS

- Growth is strongest in Europe, Asia, and the Middle East, while the U.S. market is more mature and needs new strategies to boost per-person consumption.
- The industry faces real limits on land, water, labor, and climate, which will make producing affordable, high-quality fruit more difficult over time.
- “Easy times are behind us”: competition, scaling, and challenges will intensify.
- The future remains bright for blueberries, but success will depend on innovation, collaboration, and adaptability as the industry navigates growing competition and new challenges.



IBO'S ROLE

IBO will continue uniting the industry, encouraging coordination, and looking to tackle challenges collectively.



**NEW
RELEASE**

THE 2025 IBO REPORT IT'S HERE!



***Get Your Copy
Today!***

Thank you!



www.internationalblueberry.org