HEIA

# BLUEBERRY PRODUCTION POTENTIAL IN EGYPT

## 2025

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HEIA

جمعية تنمية وتطوير الصادرات البستانية

Horticultural Export Improvement Association

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# Egypt Market Size and Value

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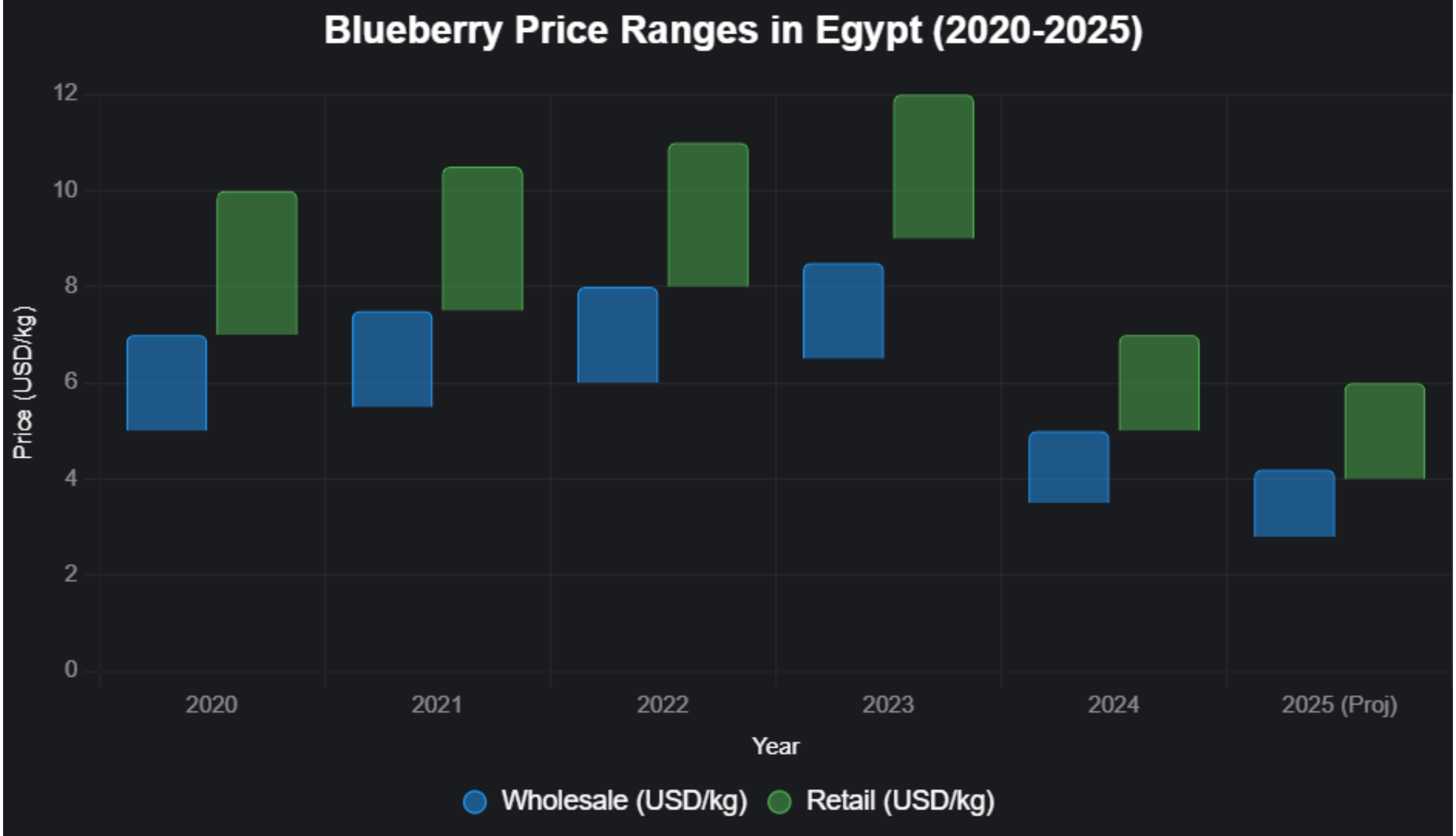
# Egyptian Blueberry Market Overview

Experienced a notable contraction leading up to 2024

- Total market value declined from historical highs around 2012

**2025 price ranges:**

- Wholesale: USD 1.35–3.37/kg
- Retail: USD 1.93–4.82/kg in Cairo and Alexandria



Blueberry Price Ranges in Egypt (2020-2025)
Price (USD/kg)
12
10
8
6
4
2
0
2020
2021
2022
2023
2024
2025 (Proj)
Year
Wholesale (USD/kg)
Retail (USD/kg)

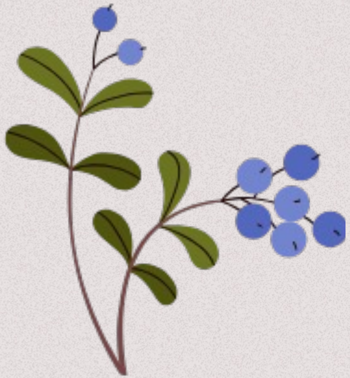
# Production and Yield Trends

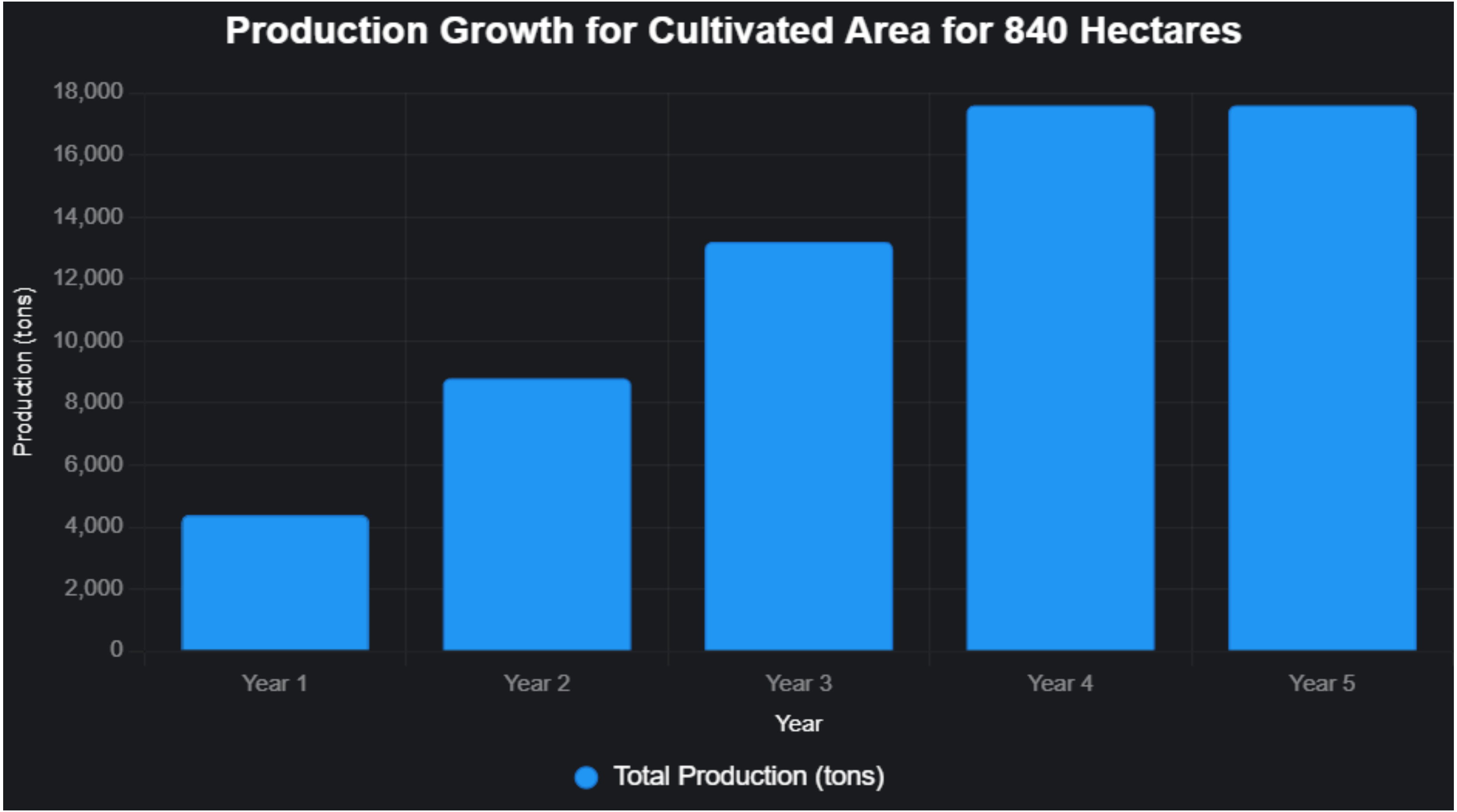
02

# Blueberry Production Trends

## In Egypt

- **Growth remains modest** due to limited harvested area and unfavorable weather
- **Yields have stabilized**, showing a flat trend in recent years
- **Modern farming techniques** sustain productivity but haven’t driven major yield increases




Production Growth for Cultivated Area for 840 Hectares
18,000
16,000
14,000
12,000
10,000
8,000
6,000
4,000
2,000
0
Production (tons)
Year 1
Year 2
Year 3
Year 4
Year 5
Year
Total Production (tons)

# Export Trends

03

# Egyptian Blueberry Export Trends

## Main destinations:

- **UK** (primary market)
- **France** and **Mauritius** (secondary markets)

## Rapid export growth

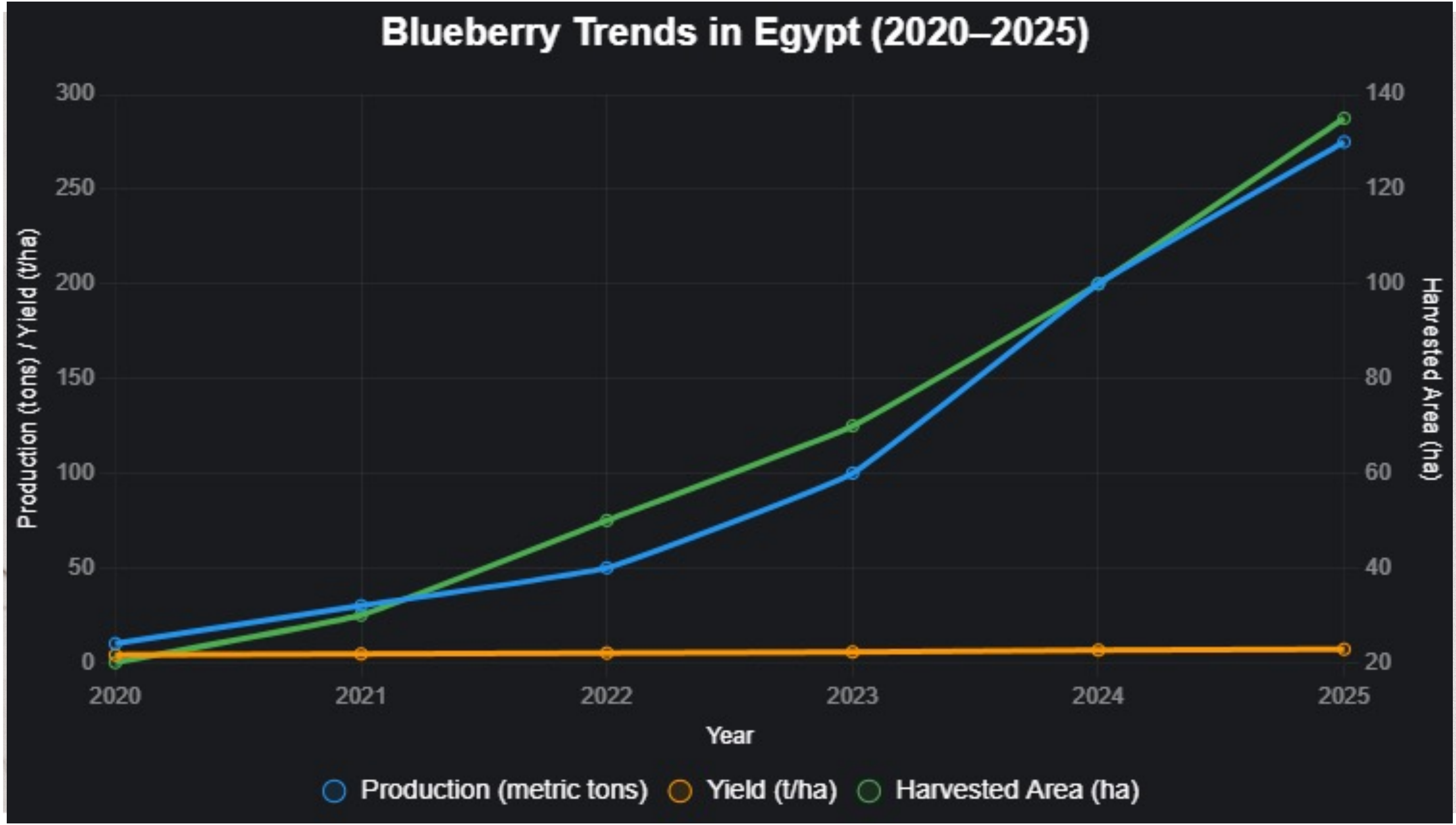
- Egypt – a **new entrant** in the berry export market
- **Exports to the UK rose by 247%** (from **43 tons** → **149 tons**) between early 2024 and early 2025

## Export performance

- Export **values and volumes** have steadily **increased**
- **Prices appreciated**, peaking around **2024**

## Exporter Status

- Export-focused production
- Target markets
- Trend


Blueberry Trends in Egypt (2020–2025)
Production (tons) / Yield (t/ha)
Harvested Area (ha)
300
250
200
150
100
50
0
140
120
100
80
60
40
20
2020
2021
2022
2023
2024
2025
Year
Production (metric tons)
Yield (t/ha)
Harvested Area (ha)

# Import and Supply Considerations

04

# Egyptian Blueberry Imports

Main suppliers

- South Africa
- Spain
- Peru

➢ **Import prices:** Historically volatile, now expected to stabilize at **USD 11–13/kg**

➢ **Purpose:** Imports fill domestic shortages and ensure year-round market supply

# Market Drivers

05

# Key Growth Drivers – Egyptian Berry Sector

- **Cold-chain expansion + precision irrigation** → better shelf life & reduced post-harvest losses
  - **Government incentives & floating exchange rate** → stronger export competitiveness
    - **E-grocery platforms on the rise** → boosting **urban berry consumption**

# Market Restraints

06

# Market Restraints – Egyptian Blueberry Sector

**Water scarcity & soil salinization** in key regions (Nile Delta, Upper Egypt) limit production potential

**High post-harvest losses** (>30%) reduce overall efficiency and profitability

**Exchange-rate volatility** increases export cost uncertainty

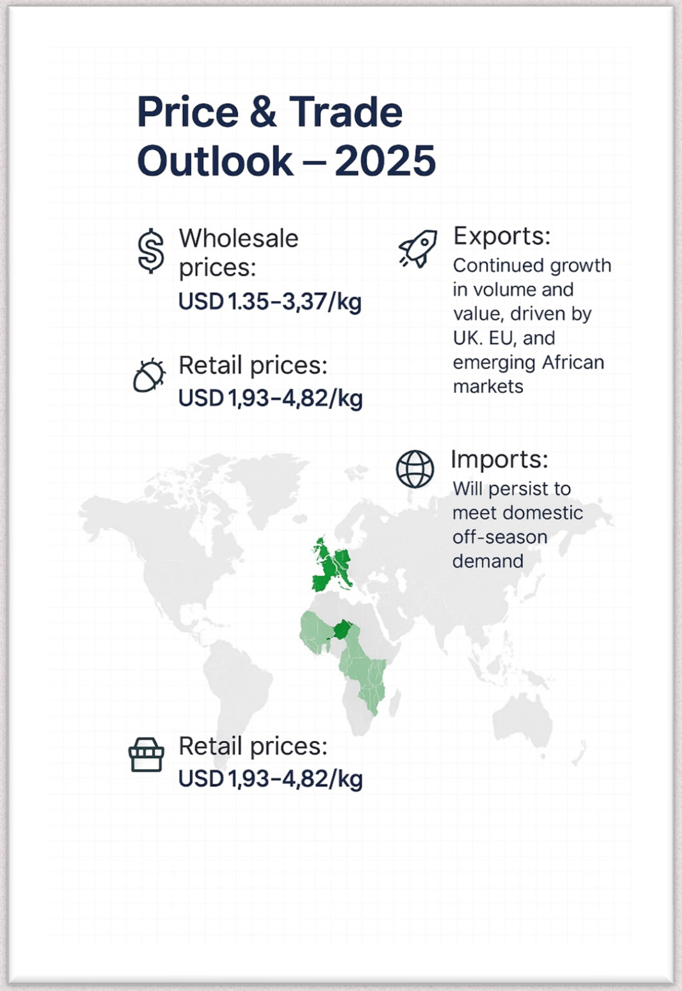
Compliance challenges with U.S. SPS regulations may restrict access to North American markets

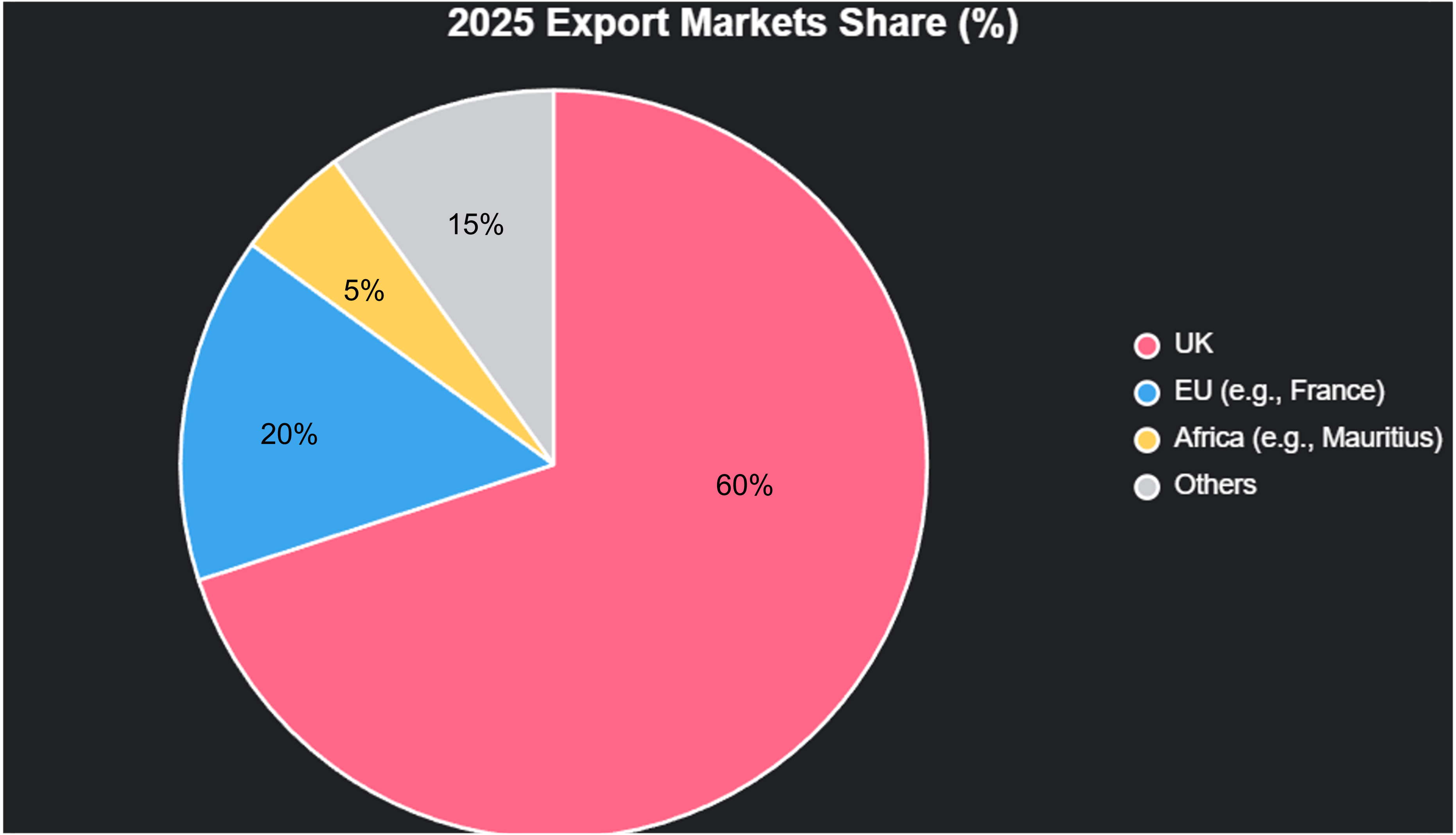
# Price & Trade Outlook

07

# Price & Trade Outlook

- Wholesale prices: USD 1.35–3.37/kg
- Exports: Continued growth in volume and value, driven by UK, EU, and emerging African markets
- Imports: Will persist to meet domestic off-season demand
- Retail prices: USD 1.93–4.82/kg




2025 Export Markets Share (%)
15%
5%
20%
60%
UK
EU (e.g., France)
Africa (e.g., Mauritius)
Others

# Strategic Insights

# Strategic Insights

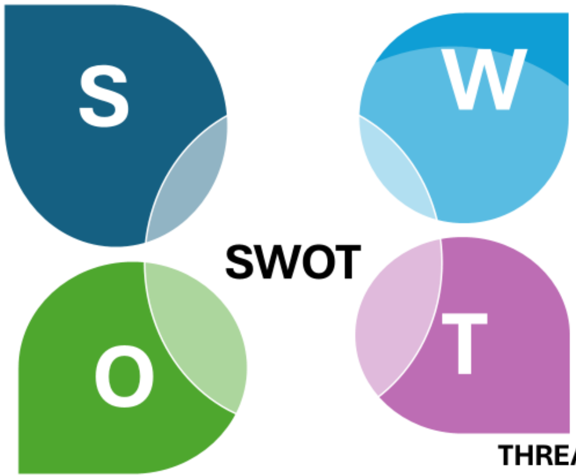
**Invest in precision irrigation, cold-chain logistics, and climate-resilient cultivars** to stabilize production and boost competitiveness

**Diversify exports beyond the EU and UK** to reduce market dependency and risk

**Adopt e-commerce channels** to reach urban consumers and strengthen domestic market presence

## STRENGTHS

1. **Strategic Geographical Location**: Proximity to European markets allows for early-season exports, giving a competitive edge.
2. **Favorable Climate**: Conditions are suitable for blueberry cultivation, enabling high-quality fruit production.
3. **Investment in Technology and Genetics**: Adoption of advanced cultivation techniques and new genetics improves yield and quality.
4. **Growing Export Market**: Rapid growth in exports, particularly to the UK, enhances market presence and brand recognition.




## WEAKNESSES

1. **Underdeveloped Cold-Chain Infrastructure**: Current cold storage capacity is limited, leading to significant post-harvest losses.
2. **High Capital Investment Requirements**: Initial investment costs for large-scale cultivation and technology adoption can be prohibitive.
3. **Labor Challenges**: Issues with labor quality and availability can impact harvest efficiency and overall quality control.
4. **Dependency on External Factors**: Market success is contingent on external factors such as climate variability and global market trends.

## OPPORTUNITIES

1. **Growing Global Demand**: Increasing health consciousness and demand for blueberries present significant market opportunities.
2. **Domestic Market Potential**: With a population of over 100 million, there is potential for growing local consumption of blueberries.
3. **Foreign Investment**: Continued interest from foreign companies in large-scale projects can drive innovation and growth.
4. **Government Support**: Initiatives aimed at enhancing agricultural technology and consolidating the sector can facilitate growth.

## THREATS

1. **Intense Competition**: Growing competition from established blueberry producers (e.g., Peru) could pressure pricing and market share.
2. **Climate Change Impacts**: Fluctuating weather patterns may affect production and yield consistency.
3. **Economic and Trade Risks**: Fluctuations in trade policies and economic conditions can impact export dynamics.
4. **Quality Control Issues**: Maintaining quality standards in the face of rapid expansion may be challenging and could affect reputation.

# Questions

# Thanks

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