Blackberry Market Overview

Mark Gaskell, Farm Advisor
UCCE - San Luis Obispo
U.S. Sales of Small Fruits - 2008

- Strawberry: 57.2%
- Blueberry: 24.7%
- Raspberry: 11.1%
- Blackberry: 5.5%
- Other: 1.4%
Blackberry - All US terminal markets

Average Prices Trend

<table>
<thead>
<tr>
<th>Week Ending Date</th>
<th>Average Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb 2/11/2012</td>
<td>$15.00</td>
</tr>
<tr>
<td>Mar 3/17/2012</td>
<td>$17.50</td>
</tr>
<tr>
<td>Apr 4/21/2012</td>
<td>$20.00</td>
</tr>
<tr>
<td>May 5/16/2012</td>
<td>$17.50</td>
</tr>
<tr>
<td>July 6/30/2012</td>
<td>$25.00</td>
</tr>
<tr>
<td>Aug 8/4/2012</td>
<td>$27.50</td>
</tr>
<tr>
<td>Sept 8/12/2012</td>
<td>$22.50</td>
</tr>
<tr>
<td>Oct 9/13/2012</td>
<td>$20.00</td>
</tr>
<tr>
<td>Nov 10/13/2012</td>
<td>$18.00</td>
</tr>
<tr>
<td>Dec 11/17/2012</td>
<td>$15.50</td>
</tr>
<tr>
<td>Dec 12/22/2012</td>
<td>$13.00</td>
</tr>
</tbody>
</table>

Average Price: $20.34
Blackberry – LA Terminal Market

Average Prices Trend

Week Ending Date

Feb, Mar, Apr, May, July, Aug, Sept, Oct, Nov, Dec

Average Price

$30.00
$25.00
$20.00
$15.00
$10.00
$5.00
$0

$18.74
Blackberry – all shipping points

Average Price Trend

- Feb
- Mar
- Apr
- May
- July
- Aug
- Sept
- Oct
- Nov
- Dec

Average Price

- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- December

Average Price: $14.05
Blackberry – ORGANIC - LA / SF Terminal Markets

Average Prices Trend

Week Ending Date

Feb  Mar  Apr  May  June  July  Aug  Sept  Oct  Nov  Dec

$0  $10.00  $20.00  $30.00  $40.00  $50.00  $60.00

$30.77
Blackberries 2013

- Among Fresh Trends' top 20 most popular fruits
- younger shoppers (age 21-39) more likely to buy than older shoppers
- Upper income >>> lower income
- Western more than Eastern US
- 32% of blackberry buyers bought organic at least some of time
Mexico influences CA blackberry market

- Major shipper to US, Canada, and world-wide
- High volumes in market affect price
- Important market window remains

June > December?
Mexico – berry sector development

- traditionally strawberries - frozen or processed

- Now also raspberries, blackberries, and blueberries,  
  ---> fresh market  
  - high tunnels widely used
Mexico blackberry situation

- Fresh berry sector growing rapidly
- Total "new" berry exports ~ $1 Billion in next 5 yrs
- Protected cropping is important
Mexico – berry sector development

- Baja California is big traditional U.S. supplier.

- move from open-field > protected (greenhouse / shade house)

- Still strawberries but other berries have shown more impressive growth

- Blackberries began in late 1980s with Brazos then switch to Tupy in 1990s.
Mexico – berry sector development

• Many small farms (< 10 ac.) on Ejido land

• Traditional crops like corn and beans not profitable
  – free trade, etc.

• Berry crops recent engine for development rural areas

• Intensive production with high labor requirement
  - growers can make money on small acreage
  - exporters and US marketing cos. Finance infrastructure and provide guidance and marketing
## Berry Production in Mexico

<table>
<thead>
<tr>
<th></th>
<th>2004</th>
<th></th>
<th></th>
<th>2010</th>
<th></th>
<th></th>
<th>2011</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Area planted (ha)</td>
<td>Production (MT)</td>
<td>Yield (MT/ha)</td>
<td>Area planted (ha)</td>
<td>Production (MT)</td>
<td>Yield (MT/ha)</td>
<td>Area planted (ha)</td>
<td>Production (MT)</td>
</tr>
<tr>
<td>Blueberry</td>
<td>60</td>
<td>280</td>
<td>4.67</td>
<td>402</td>
<td>1,059</td>
<td>9.99</td>
<td>783</td>
<td>6,704</td>
</tr>
<tr>
<td>Raspberry</td>
<td>315</td>
<td>3,045</td>
<td>10.80</td>
<td>1,217</td>
<td>14,344</td>
<td>16.04</td>
<td>1,345</td>
<td>21,468</td>
</tr>
<tr>
<td>Strawberry</td>
<td>177,230</td>
<td>28.02</td>
<td>6,555</td>
<td>226,657</td>
<td>36.08</td>
<td>7,005</td>
<td>228,900</td>
<td>32.80</td>
</tr>
<tr>
<td>Blackberry</td>
<td>2,198</td>
<td>26,697</td>
<td>12.48</td>
<td>8,188</td>
<td>61,558</td>
<td>9.63</td>
<td>11,297</td>
<td>135,563</td>
</tr>
<tr>
<td>Total:</td>
<td>9,038</td>
<td>207,251</td>
<td></td>
<td>16,361</td>
<td>303,618</td>
<td></td>
<td>20,430</td>
<td>392,634</td>
</tr>
</tbody>
</table>
# Raspberry Production - Mexico

<table>
<thead>
<tr>
<th>Top States</th>
<th>2011</th>
<th>2012 * Estimates</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Area planted (ha)</td>
<td>Production (MT)</td>
</tr>
<tr>
<td>Baja California</td>
<td>160</td>
<td>4,640</td>
</tr>
<tr>
<td>Jalisco</td>
<td>939</td>
<td>13,493</td>
</tr>
<tr>
<td>Michoacan</td>
<td>179</td>
<td>2,821</td>
</tr>
<tr>
<td>Other</td>
<td>67</td>
<td>513</td>
</tr>
<tr>
<td>Total:</td>
<td>1,345</td>
<td>21,467</td>
</tr>
</tbody>
</table>

Source: SIAP and Aneberries

Gain Report MX 3030, USDA-FAS March 2013
### Blackberry Production - Mexico

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<tbody>
<tr>
<td></td>
<td>Area planted (ha)</td>
<td>Production (MT)</td>
</tr>
<tr>
<td>Jalisco</td>
<td>389</td>
<td>4,357</td>
</tr>
<tr>
<td>Michoacan</td>
<td>10,752</td>
<td>129,404</td>
</tr>
<tr>
<td>Other</td>
<td>156</td>
<td>1,802</td>
</tr>
<tr>
<td>Total:</td>
<td>1,345</td>
<td>135,563</td>
</tr>
<tr>
<td>Crop</td>
<td>Protected Ag (tunnels) Share</td>
<td>Ave. Labor Reqt. (worker/ha)</td>
</tr>
<tr>
<td>------------</td>
<td>-----------------------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td>Strawberry</td>
<td>50%</td>
<td>7</td>
</tr>
<tr>
<td>Raspberry</td>
<td>90%</td>
<td>7.8</td>
</tr>
<tr>
<td>Blackberry</td>
<td>40%</td>
<td><strong>10</strong></td>
</tr>
<tr>
<td>Blueberry</td>
<td>50%</td>
<td>7.8</td>
</tr>
</tbody>
</table>
Mexico – berry sector development

• traditionally strawberries - frozen or processed

• Now also raspberries, blackberries, and blueberries,
  ---＞ fresh market
  - high tunnels widely used

• Mexico is major berry exporter
  - rural development impacts that can be felt in the US
Blackberry Market - Summary

- **Blackberry is smallest volume berry crop but growing**
- **Season shipping point prices average ~ $14**
- **Best market for California growers mid June > Dec**
- **Mexico is major berry exporter primarily December to June**
Blackberry Market Overview

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