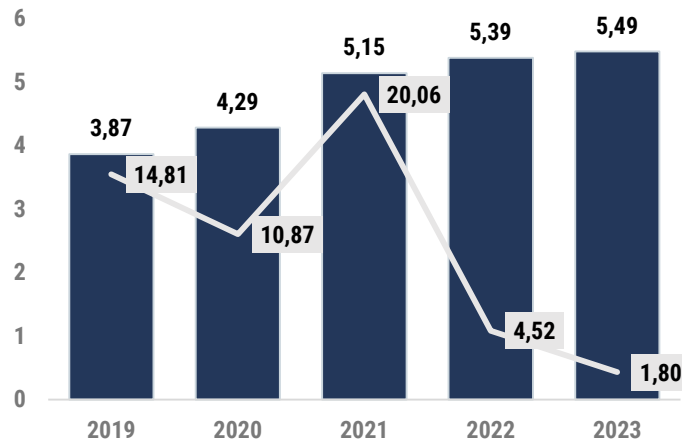


Blueberries Exports from Africa to Europe

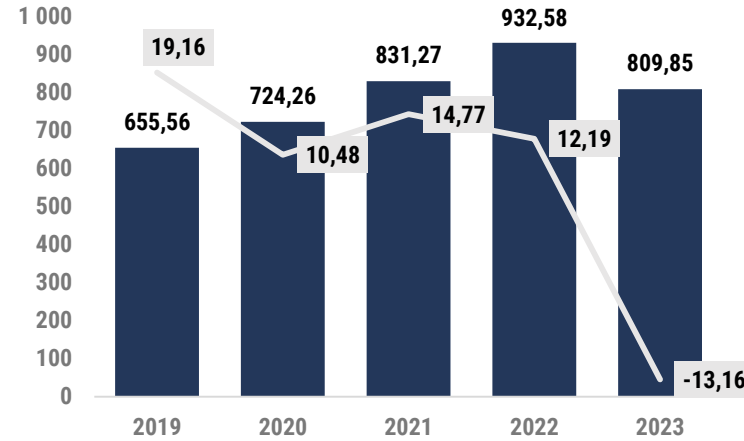
Trade Opportunities for African countries in the European blueberry market

Global Imports of Blueberry and Similar Berries in 2019 -2023

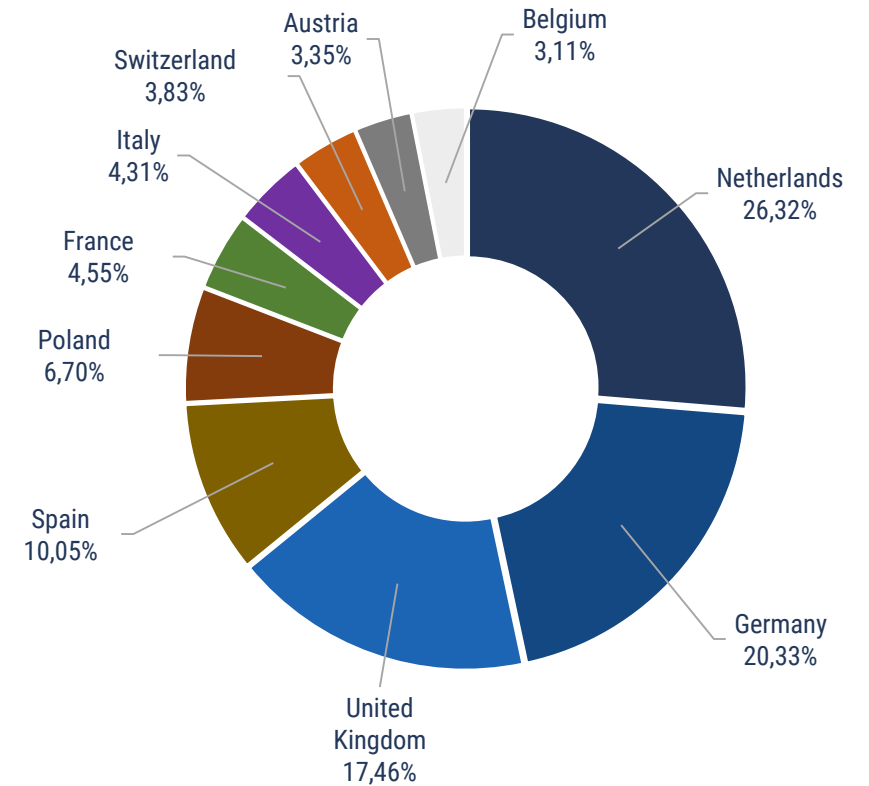
Global Imports Value, B USD



Global Imports Volume, K tons



Major Markets in Europe and their Shares in Imports in 2023



Key Suppliers to the Selected European Blueberries Markets

Importing Country	#1	#2	#3	#4	#5	#6	#7	#8
United Kingdom	Morocco	Zimbabwe	Egypt	South Africa	Mauritius	Namibia	Côte d'Ivoire	Kenya
Spain	Morocco	Zimbabwe	Egypt	South Africa	Senegal			
France	Morocco	Zimbabwe	Egypt	South Africa				
Switzerland	Zimbabwe	Namibia	Kenya	Senegal	Ethiopia			
Netherlands	Morocco	Zimbabwe	South Africa	Namibia	Kenya	Zambia		
Germany	Morocco	Zimbabwe	South Africa	Namibia	Zambia	United Rep. of Tanzania		
Poland	Morocco	South Africa	Namibia	Ethiopia	United Rep. of Tanzania	Central African Rep.		

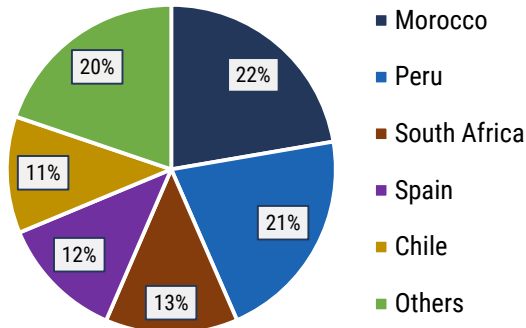
Source: GTAIC Reports on selected European countries for HS Code 081040, that includes blueberries, cranberries and other fruits of the genus vaccinium.

Suppliers to the Selected European Blueberries Markets



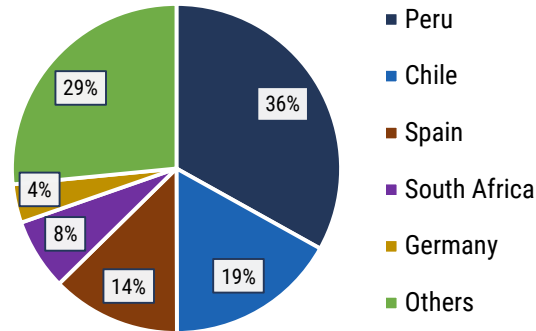
United Kingdom

LTM: 09.2023 - 08.2024



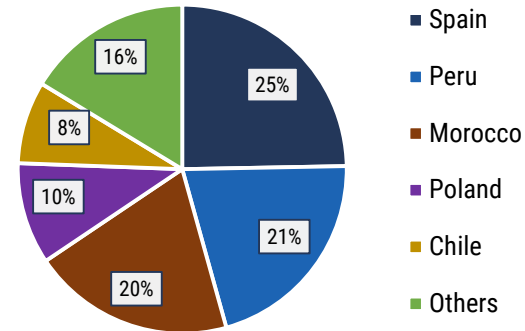
Netherlands

LTM: 09.2023 - 08.2024



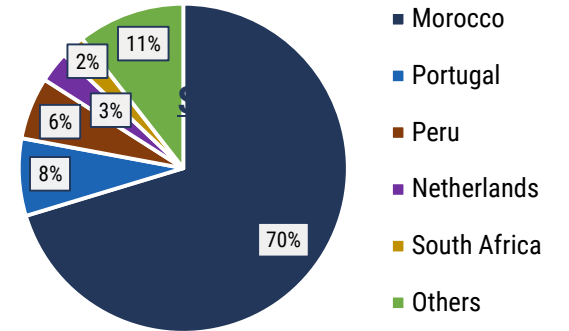
Germany

LTM: 10.2023 - 09.2024



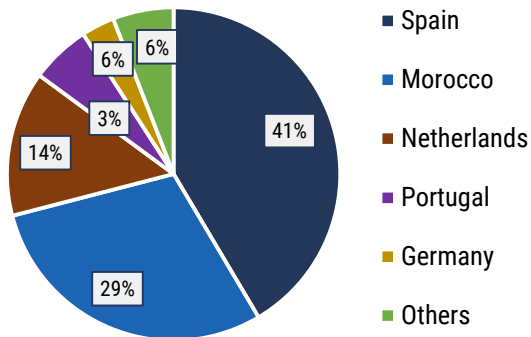
Spain

LTM: 09.2023 - 08.2024



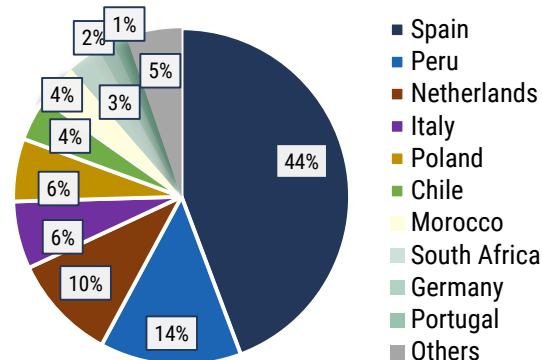
France

LTM: 03.2023 - 02.2024



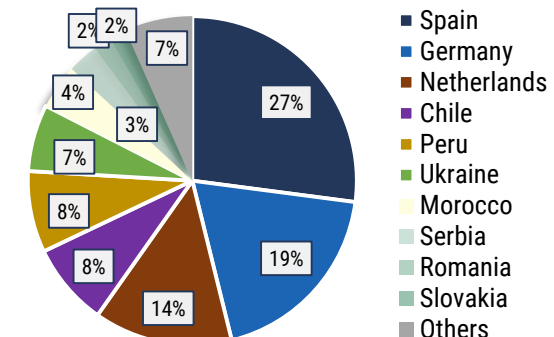
Switzerland

LTM: 09.2023 - 08.2024



Poland

LTM: 10.2023 - 09.2024



LTM stands for "Last Twelve Months" period, referring to the most recent twelve-month timeframe for which trade statistics have been reported by each country. This period may vary for each country under analysis.

Recent Changes in the Selected European Blueberries Markets

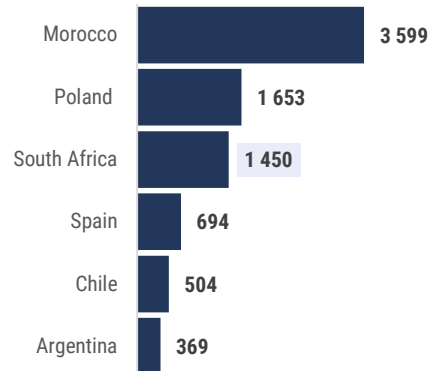
The illustrations below depict the changes in imports from the countries listed in the graphs, comparing the LTM period with the same period a year before, as reported by the analyzed European countries.



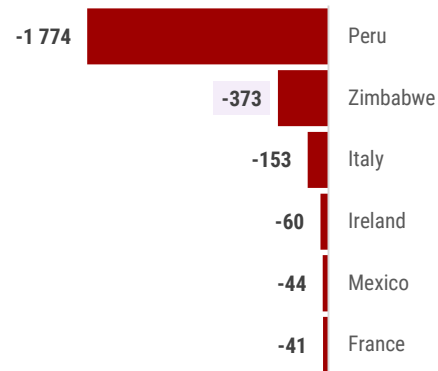
United Kingdom

LTM: 09.2023 - 08.2024

Suppliers with Highest Increase, tons



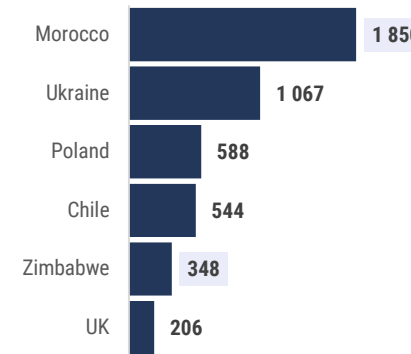
Suppliers with Highest Decrease, tons



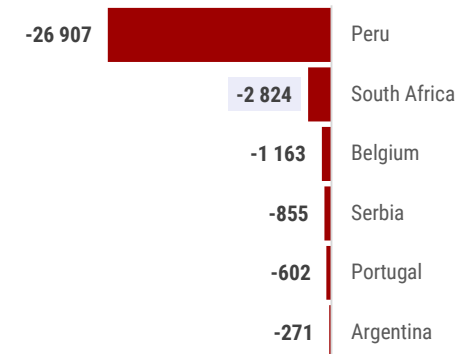
Netherlands

LTM: 09.2023 - 08.2024

Suppliers with Highest Increase, tons



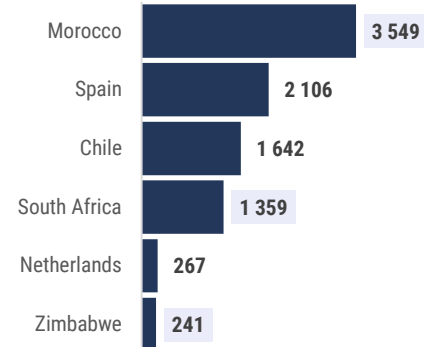
Suppliers with Highest Decrease, tons



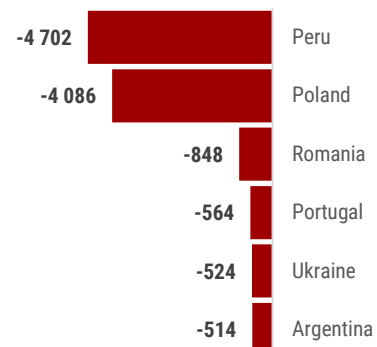
Germany

LTM: 10.2023 - 09.2024

Suppliers with Highest Increase, tons



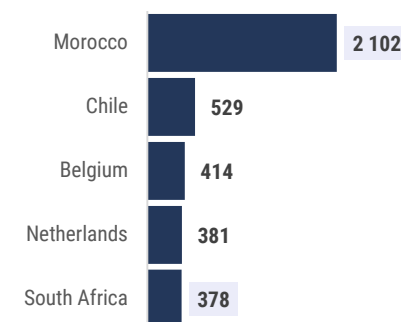
Suppliers with Highest Decrease, tons



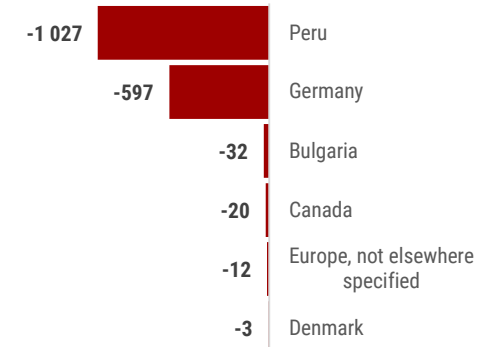
Spain

LTM: 09.2023 - 08.2024

Suppliers with Highest Increase, tons



Suppliers with Highest Decrease, tons



Recent Changes in the Selected European Blueberries Markets

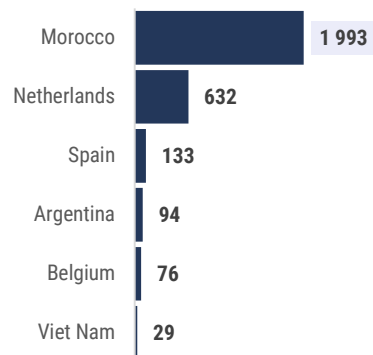
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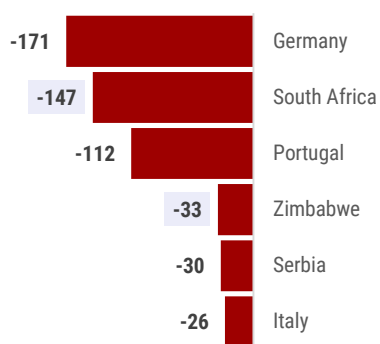
France

LTM: 03.2023 - 02.2024

Suppliers with Highest Increase, tons



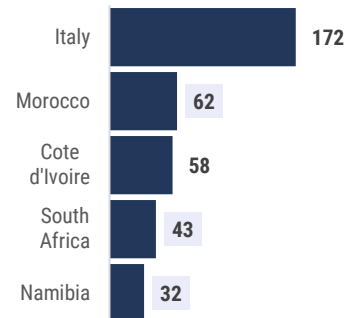
Suppliers with Highest Decrease, tons



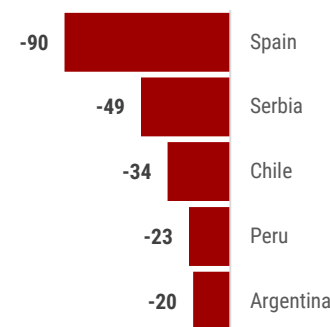
Switzerland

LTM: 09.2023 - 08.2024

Suppliers with Highest Increase, tons



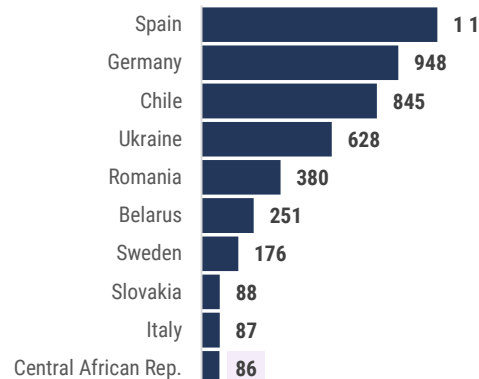
Suppliers with Highest Decrease, tons



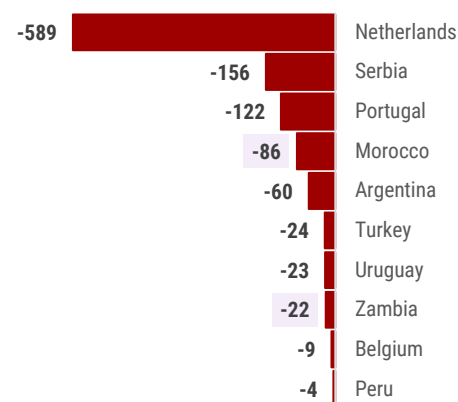
Poland

LTM: 10.2023 - 09.2024

Suppliers with Highest Increase, tons



Suppliers with Highest Decrease, tons



[illegible]

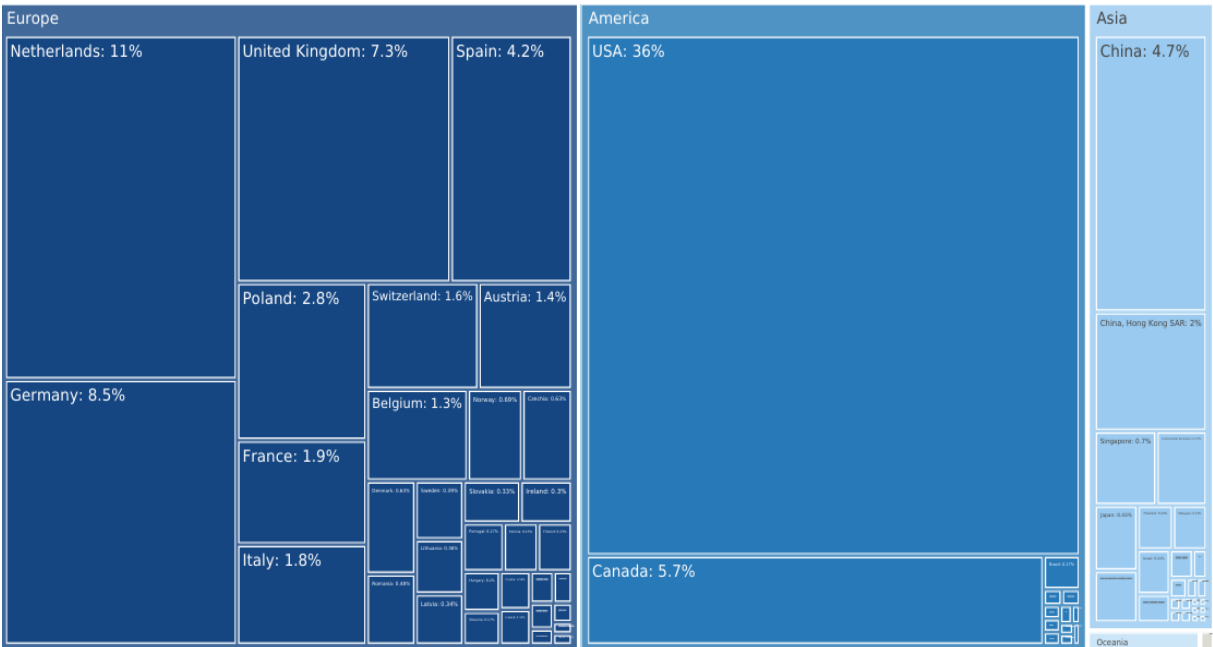
European Blueberry Markets Trends

In 2023, the global imports of blueberries reached USD 5.49 billion, up from USD 5.39 billion in 2022, reflecting a 1.80% annual growth rate.

In 2023, the European region represents over 42% of global blueberry imports by value. Key importers within Europe include the Netherlands (11% in global imports), Germany (8.5%), the United Kingdom (7.3%), and Spain (4.2%).

Many of these countries are experiencing substantial growth in blueberry imports from African suppliers, particularly from Morocco and South Africa, during the 2023-2024. Rather than competing, these two countries collaborate to ensure a consistent, year-round supply of blueberries.

Global Imports of blueberries in 2023 by Country



Trends in Imports of Blueberries of the Top-10 European importers

Importing Country	5Y CAGR (\$)	LTM growth (\$)	6-month growth (\$)	Growth in 2024 (\$)	Largest Supplier in 2023	Largest Contributor in LTM
Netherlands	7,78%	-0.16%	16,52%	21.70%	Peru	Peru
Germany	6,69%	14,15%	-2,19%	14.04%	Peru	Peru
UK	0,51%	23,59%	25.55%	28.37%	Peru	Morocco
Spain	15,55%	17.13%	7.14%	17.54%	Morocco	Morocco
Poland	23.14%	24.22%	6.31%	27.16%	Spain	Spain
France	10.43%	41.72%	57.69%	72.82%	Spain	Spain
Italy	23.74%	25.96%	19.23%	18.93%	Spain	Spain
Switzerland	16.36%	18.29%	-1.89%	8.73%	Spain	Spain
Belgium	8.08%	43.93%	54.23%	49.44%	Netherlands	Netherlands

Due to the absence of reliable data, trends in Austrian imports are not included in the analysis

Netherlands

In 2023, the Netherlands accounted for 11.05% of global blueberry imports. The country's imports showed significant growth in 2024.

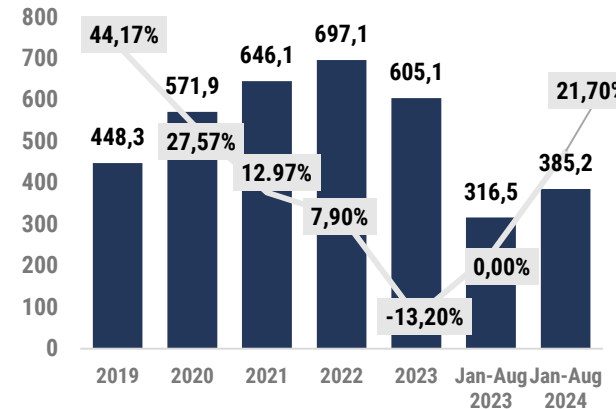
As of August 2024, the Netherlands' blueberry market reached US\$385.22 million, up from US\$316.53 million during the same period in the previous year, reflecting a growth rate of 21.7%.

Import prices in the Netherlands, similar to those in the UK, fall within the medium price range. The estimated average price for blueberry and cranberry imports during the most recent twelve-month period (September 2023–August 2024) was USD 7,016.03 per metric ton.

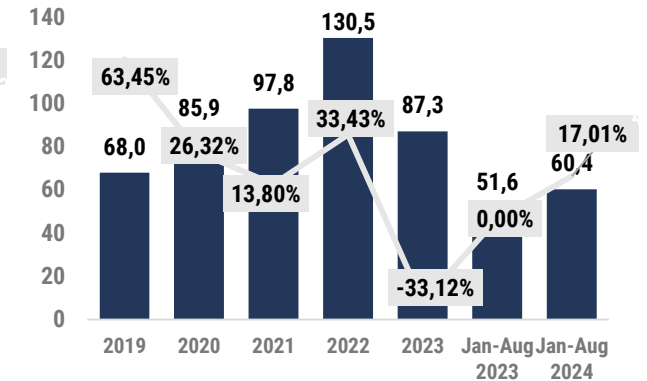
In 2023, South Africa held a 10% market share. During the LTM period (March 2023–February 2024), South Africa notably increased its exports by US\$10.24 million in value terms.

Other African suppliers, including Morocco, Zimbabwe, Namibia, and Kenya, have smaller but growing shares in the market. In 2024, Morocco notably doubled its market share from 1.1% to 2.3%.

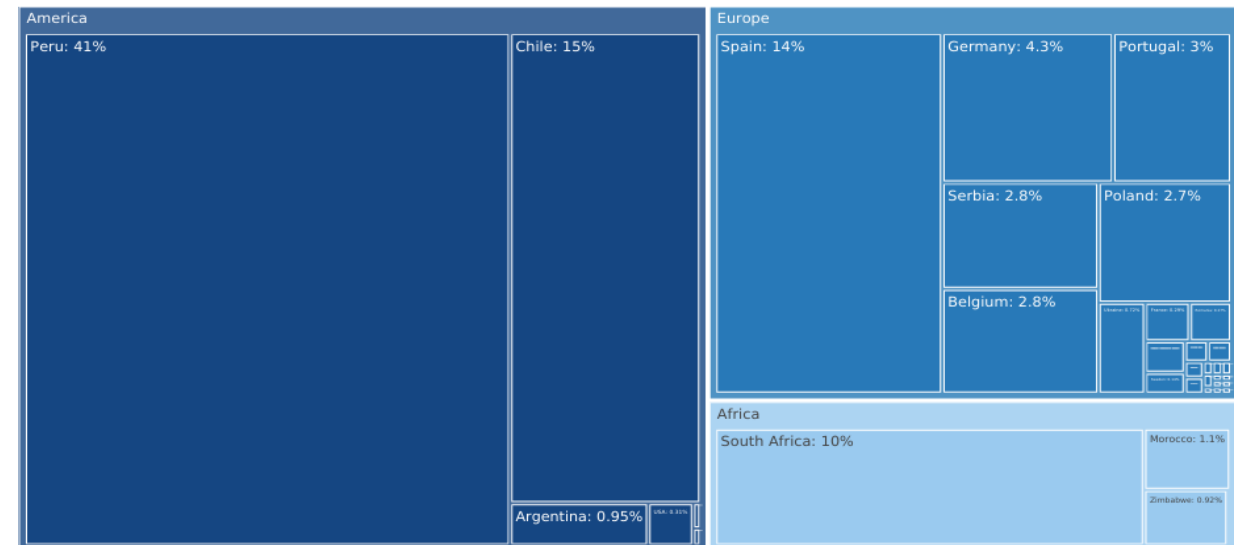
Import value, M USD



Import volume, k tons



Largest Trade Partners in 2023



Germany

As of 2023, Germany is the third-largest importer of blueberries and cranberries globally, accounting for approximately 8.5% of worldwide imports of these berries.

The German blueberry imports is experiencing growth in USD terms during the 2023-2024 period. In terms of pricing, Germany is considered a premium market, similar to Switzerland. The import price for blueberries in the most recent twelve-month period (October 2023–September 2024) is approximately USD 7,628.25 per metric ton.

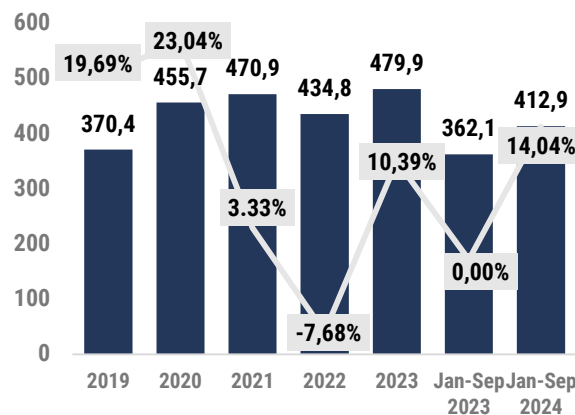
Morocco is the fastest-growing supplier to the German market, increasing its market share from 15% to 17% in 2024. Additionally, South Africa significantly boosted its exports by USD 18.27 million during the same period.

Major competitors in blueberry market of Germany are:

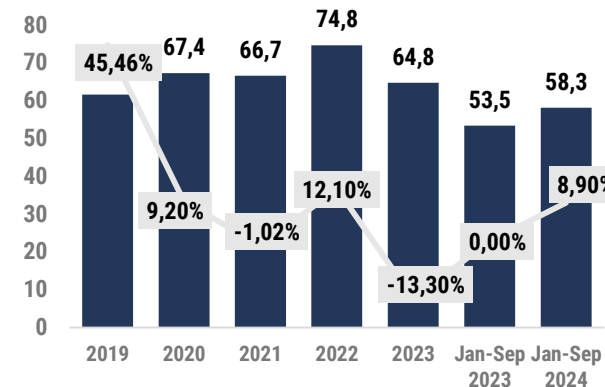
- Peru: USD 145.82 million, representing 27.47% of total imports
- Spain: USD 121.12 million, representing 22.82% of total imports
- Poland: USD 43.86 million, representing 8.26% of total imports
- Chile: USD 38.7 million, representing 7.29% of total imports

The market shares of other African suppliers, including Zimbabwe, Namibia, and the United Republic of Tanzania, remain small but are steadily growing.

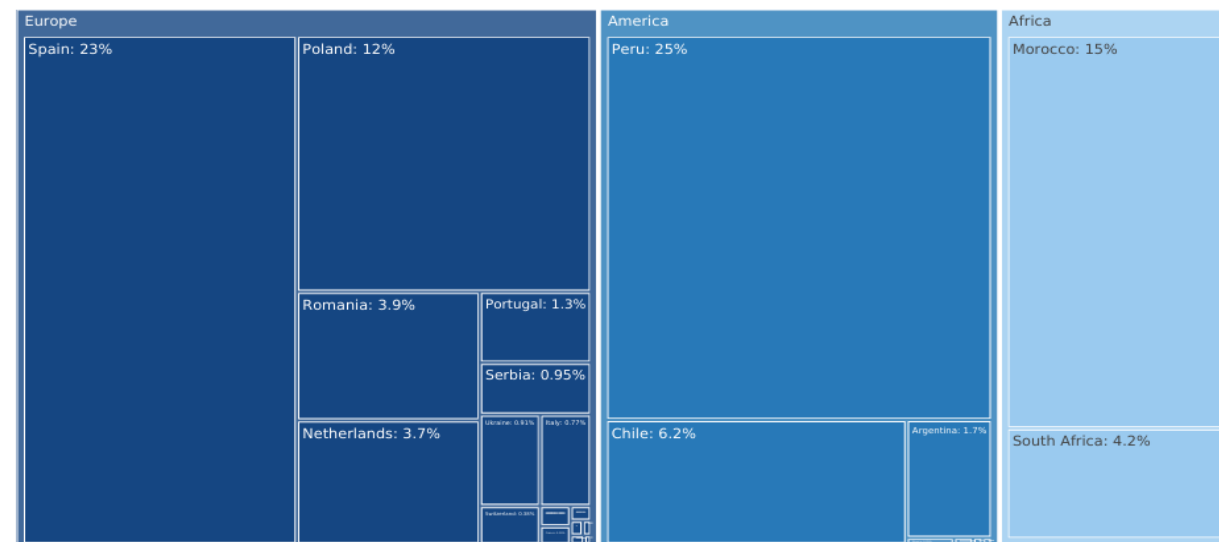
Import value, M USD



Import volume, k tons



Largest Trade Partners in 2023



United Kingdom

The United Kingdom accounted for 7.3% of global blueberry imports in 2023. In USD terms, the UK market is also experiencing growth in 2024.

From January to August 2024, the United Kingdom's blueberry imports rose to 48.06 Ktons, reflecting a 21.69% increase compared to 39.50 Ktons during the same period in 2023. This growth rate has surpassed the long-term trend for the UK's blueberry and cranberry imports.

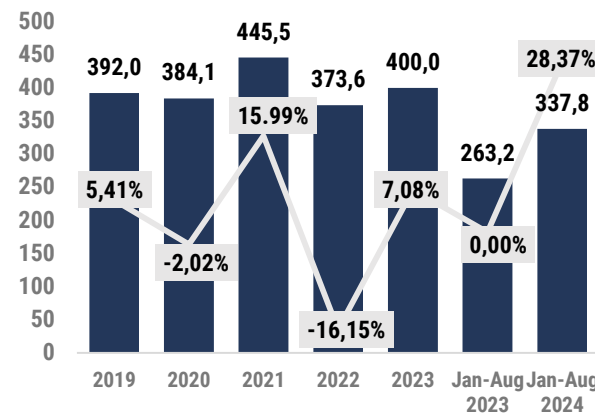
In terms of pricing, import prices have been rising in 2023-2024. UK import prices are in the medium range, averaging approximately USD 7,249.11 per ton.

Morocco is the fastest-growing supplier to the UK, increasing its market share from 20% to 22.69% in 2024, surpassing Peru, which holds a 20.97% share.

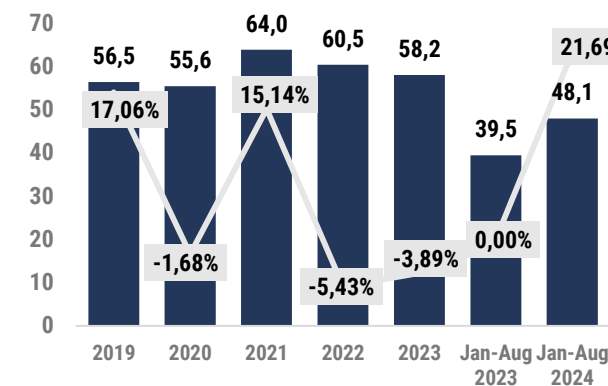
In the most recent twelve-month period (September 2023–August 2024), Morocco and South Africa saw significant supply increases of 3,568.6 tons and 1,449.6 tons, respectively. The main driver behind South Africa's growth was a price increase, reaching approximately USD 8,000 per ton.

While the shares of other African suppliers—such as Zimbabwe, Egypt, Mauritius, Namibia, and Côte d'Ivoire—remain small, they are growing rapidly.

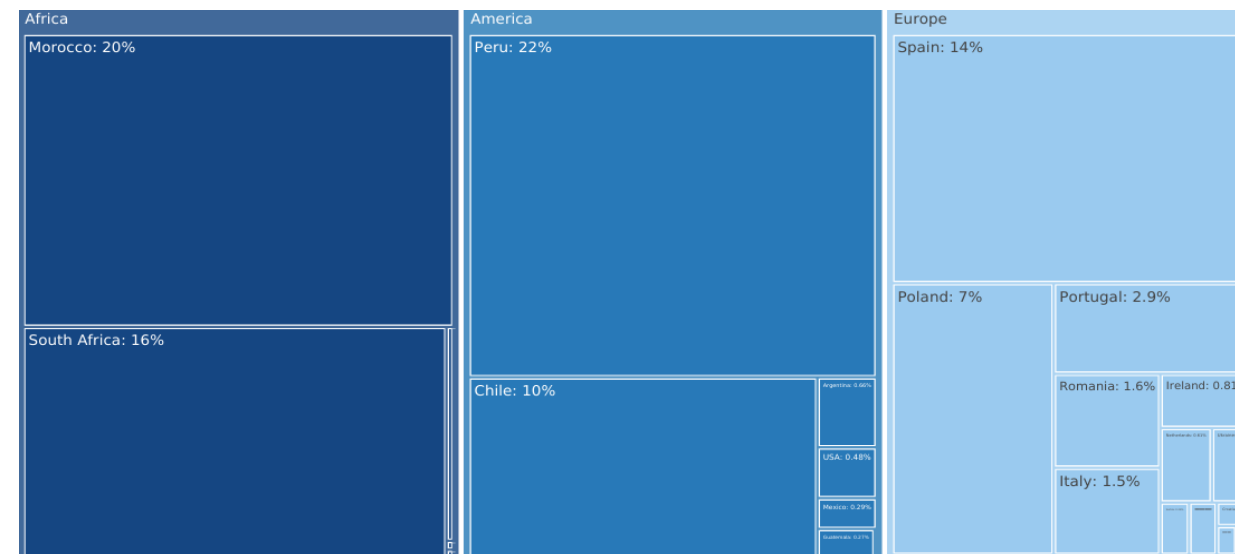
Import value, M USD



Import volume, k tons



Largest Trade Partners in 2023



Spain

In value terms, the Spanish blueberry imports has been growing between 2021 and 2024. In 2023, the country's imports surpassed USD 227.93 million.

In volume terms, the Spanish blueberry imports experienced a decline in 2023, reaching 38.64 Ktons compared to 43.38 Ktons in 2022. However, in the first eight months of 2024, the imports saw a rebound, increasing to 38.72 Ktons, up from 33.18 Ktons in the same period of 2023. This represents a growth rate of approximately 16.69%.

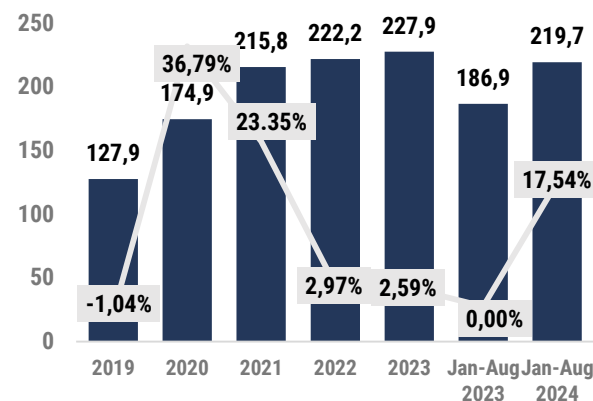
Regarding pricing, Spanish import prices have been rising between 2022 and 2024. However, prices remain significantly lower than those in other European countries, averaging around USD 5,771.66 per ton.

Morocco is the largest supplier of blueberries to Spain, holding a market share of 72% in 2023. During the most recent twelve-month period (September 2023–August 2024), Morocco increased its supplies by USD 9.57 million, or 2,102.29 Ktons. The price range for Moroccan blueberries in Spain was in the medium range, around USD 5,681 per ton.

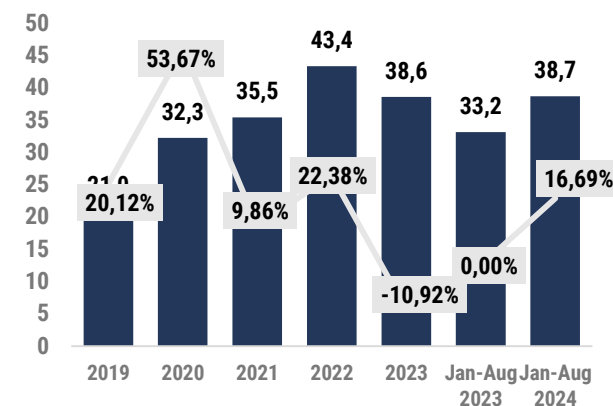
In the same period, South Africa's share of the Spanish blueberry imports rose significantly to 3.63%, reaching USD 9.45 million.

The shares of other African countries, including Zimbabwe, Egypt, and Senegal, remain small but are growing rapidly.

Import value, M USD



Import volume, k tons



Largest Trade Partners in 2023



France

The French blueberry imports experienced significant growth in 2023, exceeding USD 102.40 million or 15.97 Ktons.

The French blueberry imports demonstrated strong growth in 2023, surpassing USD 102.40 million or 15.97 Ktons, with an annual growth rate of 31.76%. During the same period, import prices also increased to USD 6,410 per ton, up from USD 5,380 per ton. This price growth provided additional opportunities for exporters. French import prices follow a similar trend to those of the UK and Netherlands, remaining in the medium price range, around USD 7,249.11 per ton.

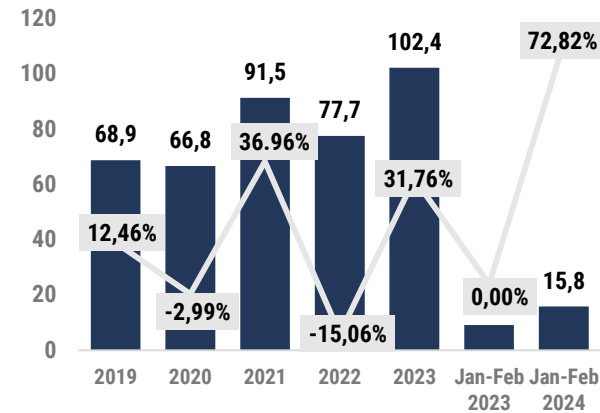
Morocco is one of the fastest-growing suppliers to France, slightly increasing its market share from 27% to 28% in 2024. During the most recent twelve-month period (March 2023–February 2024), Morocco grew its supplies by 1,993.04 tons.

South African suppliers represent a smaller share, at 1.4%.

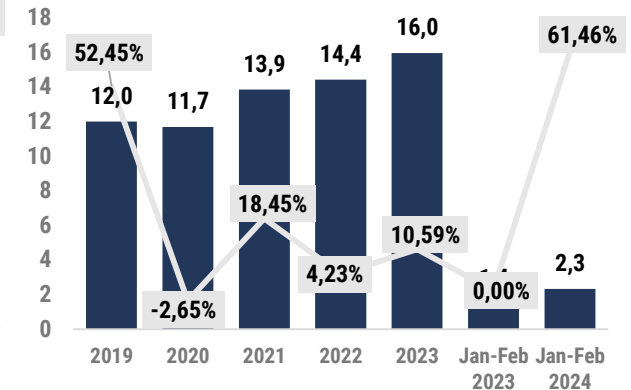
Additionally, Spain and the Netherlands are key players in reselling blueberries from Morocco and South Africa to France. In the LTM period, the shares of these suppliers were as follows:

- Spain: USD 40.9 million, or 37.5% of total imports
- Morocco: USD 29.99 million, or 27.5% of total imports
- Netherlands: USD 20.4 million, or 18.7% of total imports

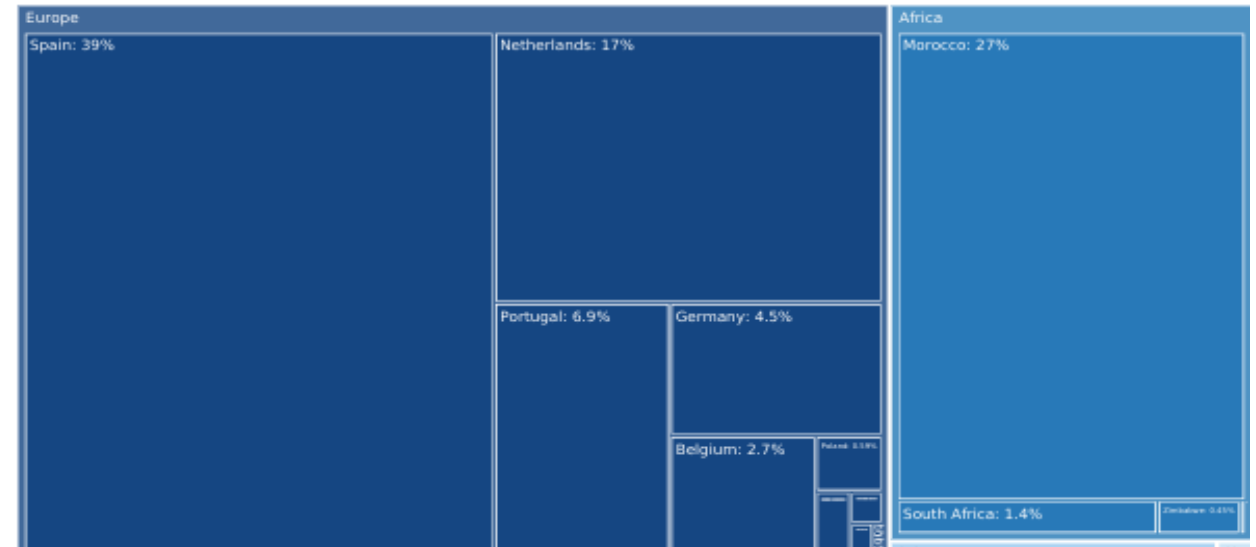
Import value, M USD



Import volume, k tons



Largest Trade Partners in 2023



Switzerland

The Swiss imports are experiencing significant growth in 2023-2024. In 2023, the blueberry imports surpassed USD 90.58 million, reflecting a robust annual growth rate of 38.58%.

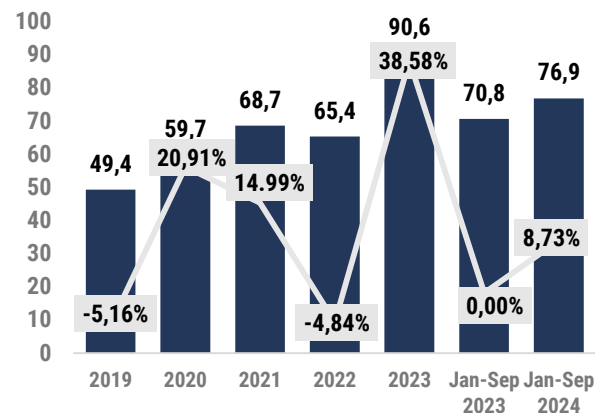
The imports size for blueberries in Switzerland reached USD 76.93 million in the first nine months of 2024, compared to USD 70.75 million during the same period in 2023, reflecting a growth rate of 8.73%.

In terms of volume, the Swiss imports also experienced an increase, reaching 8.62 Ktons in 2023, up from 8.19 Ktons in 2022. For the first nine months of 2024, the imports further grew to 7.54 Ktons, compared to 7.29 Ktons in the same period of 2023, representing a growth rate of approximately 3.48%.

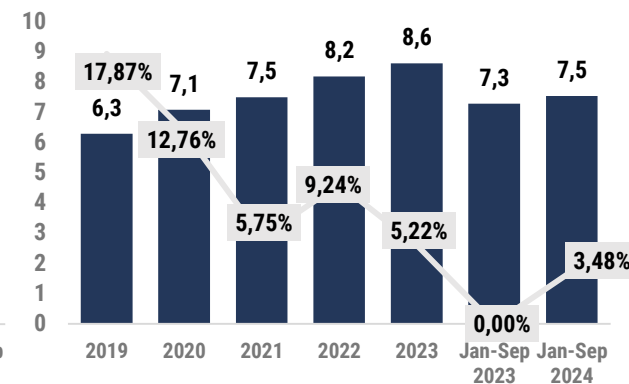
Regarding pricing, Switzerland continues to be a premium market. The estimated average import price for blueberries, cranberries, and similar fruites during the last twelve months reported by the country (October 2023 – September 2024) was USD 10,903.53 per ton.

While the share of African countries in the Swiss market remains small, it is growing rapidly. During October 2023 – September 2024, supplies from Morocco, Côte d'Ivoire, and Namibia increased by 62.35 Ktons, 58.14 Ktons, and 31.87 Ktons, respectively.

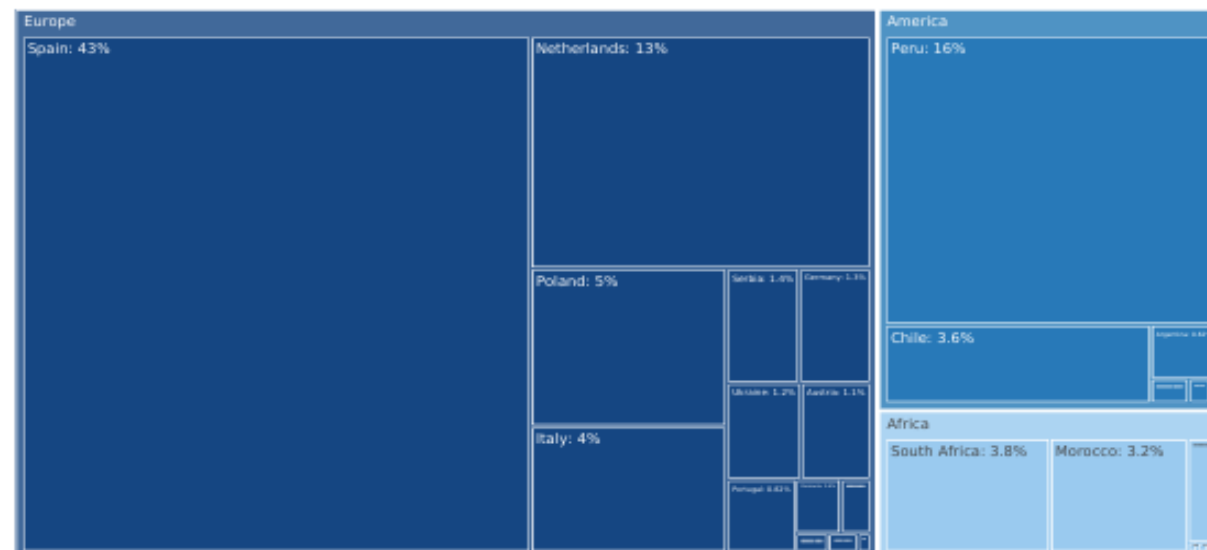
Import value, M USD



Import volume, k tons



Largest Trade Partners in 2023



Poland

The Polish imports have experienced significant growth from 2019 to 2024. In 2023, the imports surpassed USD 153.86 million, reflecting an annual growth rate of 12.80%

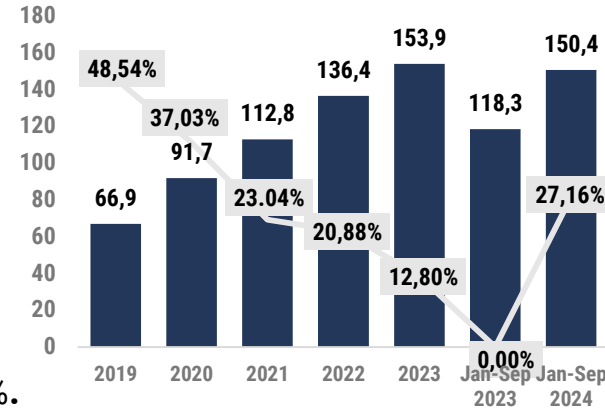
In volume terms, the Polish blueberry imports reached 20.42 Ktons in 2023, compared to 24.73 Ktons in 2022, reflecting a decline of 17.42%. However, by the first nine months of 2024, the market showed signs of recovery, growing to 22.59 Ktons, representing a growth rate of approximately 33.91%.

Pricing remained within the medium range for the Polish market, with an average of approximately USD 7,611.85 per ton.

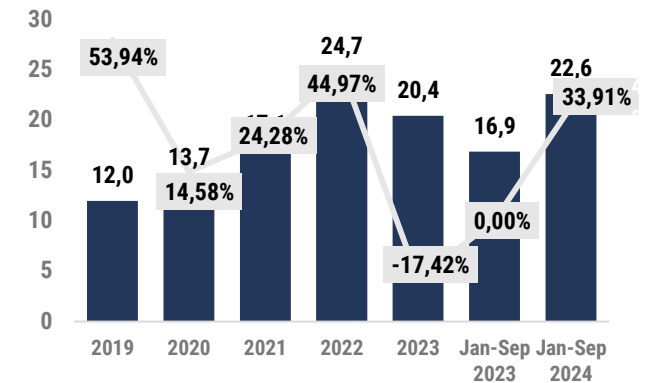
In 2023, Morocco held a 6.5% share of the Polish blueberry imports. The share of other African countries remains small but is growing rapidly. During the LTM period (October 2023 – September 2024), Zimbabwe saw a significant increase in its supply by 1,110.49 tons. Meanwhile, supplies from South Africa, the Central African Republic, and Namibia showed modest increases of 240.43 tons, 86.13 tons, and 4.10 tons, respectively.

Key suppliers to Poland include Spain and the Netherlands, which may resell fruites sourced from Morocco and South Africa.

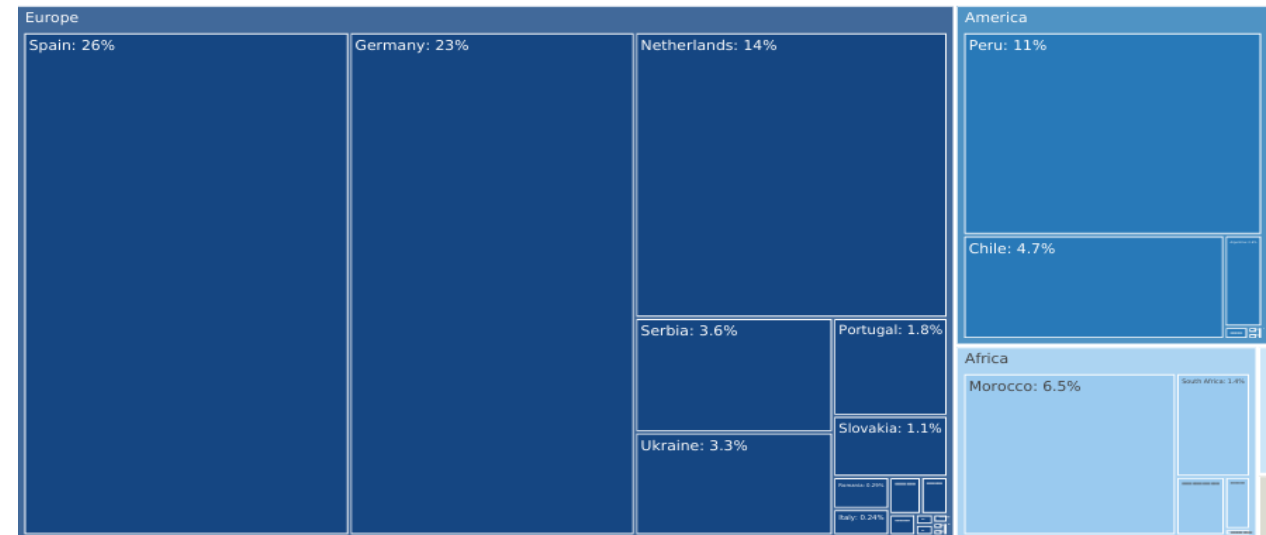
Import value, M USD



Import volume, k tons



Largest Trade Partners in 2023



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