



The Changing Landscape of U.S. Strawberry and Blueberry Markets: Production, Trade, and Challenges from 2000 to 2020

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What Is the Issue?

Since 2000, the demand for strawberries and blueberries in the United States has increased. In response, both domestic production and imports have also increased substantially. New berry varieties, advancements in technology, and increases in planting acreage led to the growth of the domestic and foreign berries industries. In the past two decades, the increase in imports outpaced the increase in domestic production. Mexico remains the dominant supplier of strawberries to the United States, while Mexico and Peru emerged as the top suppliers of blueberries in the last decade. Advancements in production technologies expanded the production seasons, and the overlap in domestic and foreign supply in the blueberry and strawberry markets has increased year-round berry availability to consumers while raising concerns about foreign competition. These changes also affected the prices that domestic producers receive.



What Did the Study Find?

Strawberries are the most popular berries in the United States in value and volume of production.

- The development and adoption of high-yielding strawberry varieties led to an increase in total domestic production with less acreage.
- Fresh strawberry imports increased significantly in the last two decades, particularly from Mexico. Fresh strawberries imported from Mexico reached a record high of 431 million pounds in 2020. While Mexican strawberries have an almost year-round presence in the U.S. market, approximately 85 percent of Mexico's U.S.-bound shipments enter the market during winter and spring months.
- Most strawberry exports from the United States are for fresh-market consumption and are shipped to Canada. Fresh strawberry exports increased 94 percent in volume during 2018–2020 compared with 2000–2020. Frozen strawberries were exported in smaller quantities and declined in the past decade.

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- Organic strawberry production has been increasing at a faster pace than conventional production. In California, which grows more than 75 percent of the domestic organic production, organic strawberry acreage tripled from 2008 to 2019.

Blueberries are the second most popular berry in value and volume of U.S. production.

- The two main types of blueberries are highbush and lowbush. Highbush blueberries are mainly for the fresh market, while lowbush blueberries are primarily used in the processed market.
- While the United States exports some fresh blueberries, it has become a net importer. Imports of fresh highbush blueberries increased from 44 million pounds in 2000–2002 to 450 million pounds in 2018–2020, which accounted for about 62 percent of the domestic fresh blueberries disappearance.
- High prices for fresh market blueberries encouraged growth in global production. With higher prices in the spring and fall months, U.S. growers adopted new cultivars and production practices to extend their season, and imports increased to supplement supplies during those months.
- Between 2010 and 2020, domestic fresh blueberry imports from Peru and Mexico grew from less than 1 percent to over 50 percent as a result of increased planted acres and higher yields, partly driven by suitable production conditions and high profitability.
- U.S. demand for organic blueberries grew rapidly between 2008 and 2019. The value of organic blueberry sales increased more than fivefold to reach \$205 million in 2019.

How Was the Study Conducted?

This report used data from the USDA, National Agricultural Statistics Service and U.S. Department of Commerce, Bureau of the Census through the USDA, Foreign Agricultural Service Global Agricultural Trade System. Authors also accessed movement data and producer and retail prices from USDA, Agricultural Marketing Service and U.S. Department of Labor, Bureau of Labor Statistics. Data gathered from these sources were used to understand changes in production, trade, and prices for strawberries and blueberries over the last two decades. The USDA, Economic Research Service calculated shares of exports and imports, as well as per capita availability, which was used as a proxy for domestic consumption. The authors also discussed the fresh and processed markets with industry representatives for greater understanding.