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Looking 10 years ahead, Global blueberry markets

What to expect from South Africa:
2026-2035

BerriesZA Annual Symposium

May 2026



Supported by

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Our journey in the SA Berry industry

Supporting BerriesZA on multiple levels

- 1) Economic and analytical insight through our modelling
- 2) Creating a public knowledge pool and credible data about the industry
- 3) Support engagements with stakeholders on the impact of the industry
- 4) Scenario planning and market access prioritisation



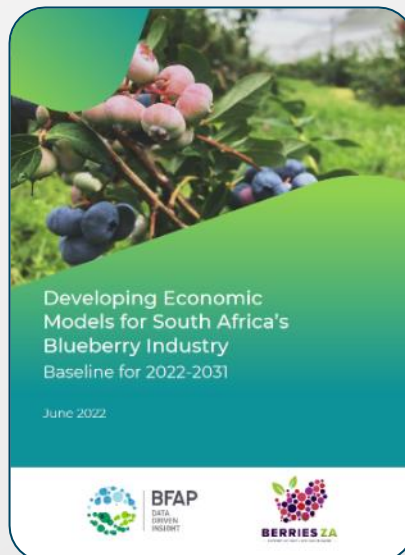
2019

2022

2023

2024

2025



BFAP Blueberry Baseline 2026-2035 now available

Most of the research presented in this presentation



Looking 10-years ahead

South African Blueberry Baseline
Outlook for 2026-2035

May 2026



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What does this mean?

- 1) Report will be made available to members online
- 2) Slides will be uploaded, no need to take pictures
- 3) We won't do an October update again



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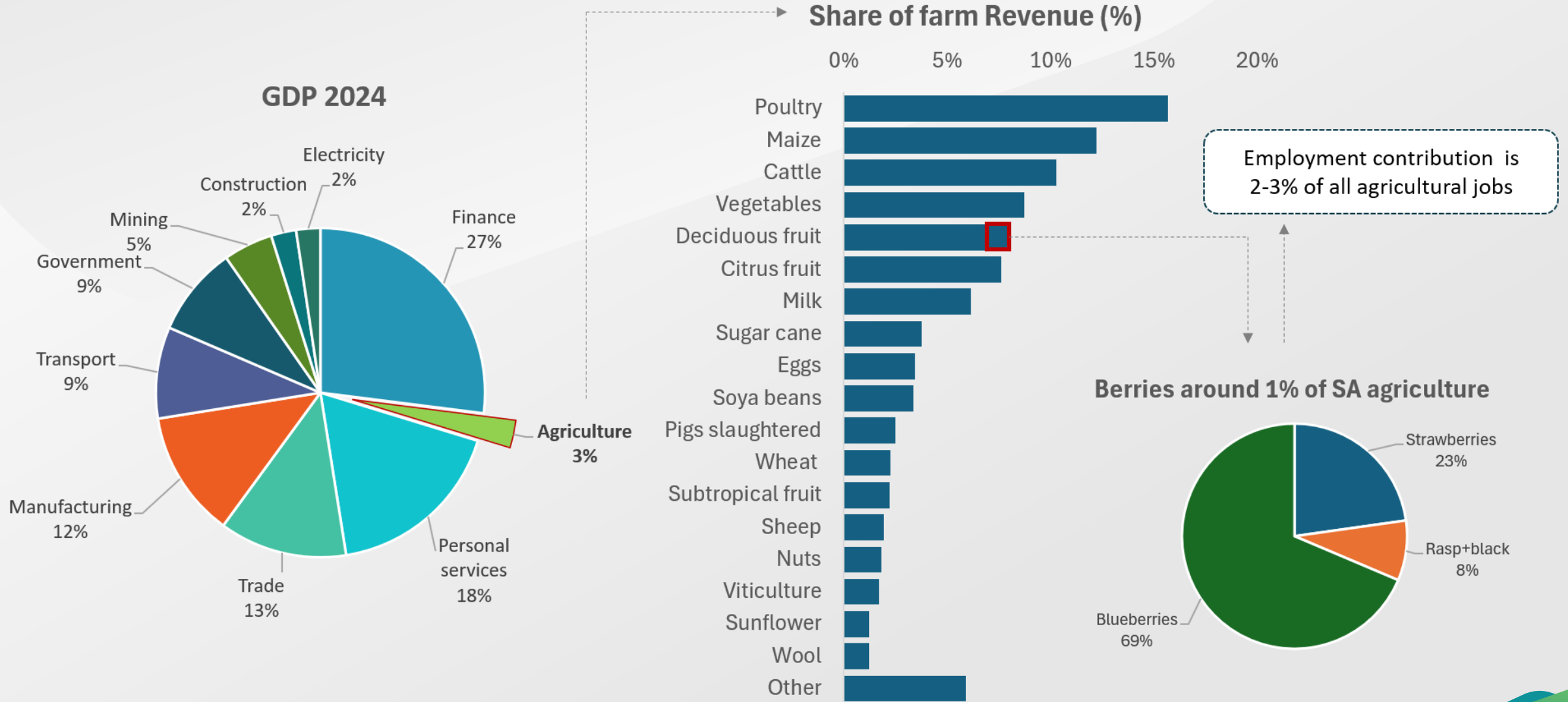
Structure

1. Why should blueberries be a priority crop for SA development
2. 10-Year Outlook for Global Demand & Supply
3. Review 2025/26 Season & Outlook
4. Why am I more optimistic this year



SA Berry industry contribution to the SA Economy

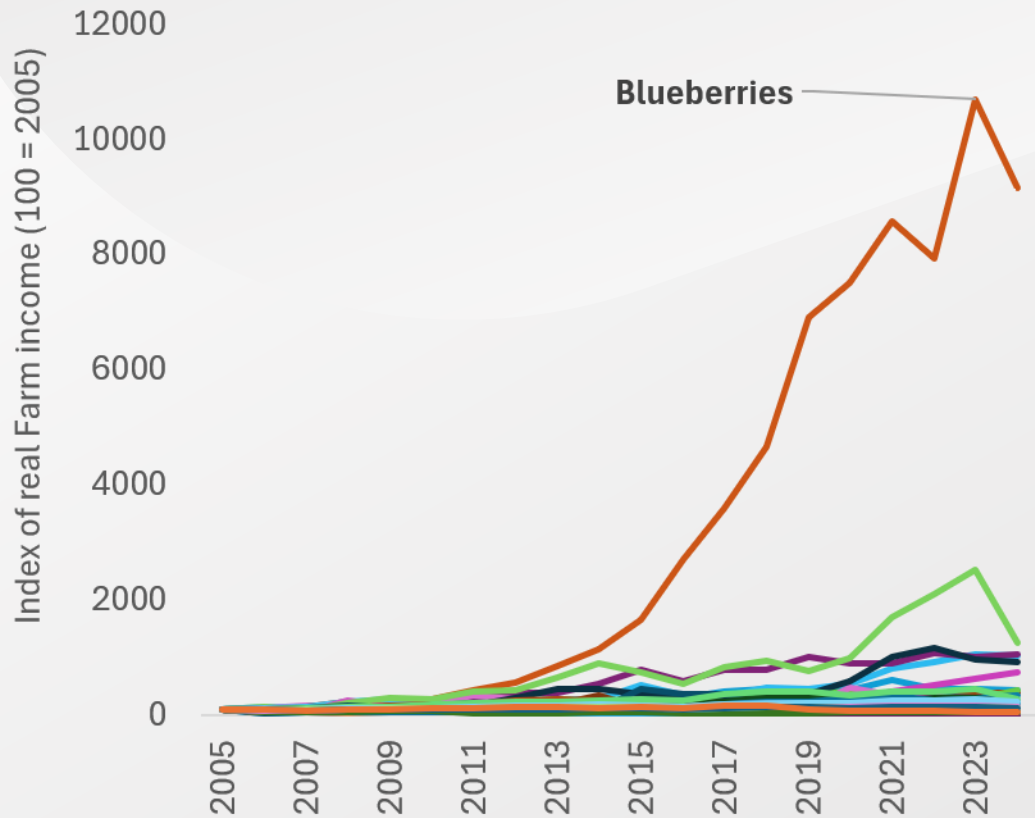
Berries are a small industry, but growing fast and extremely labour-intensive



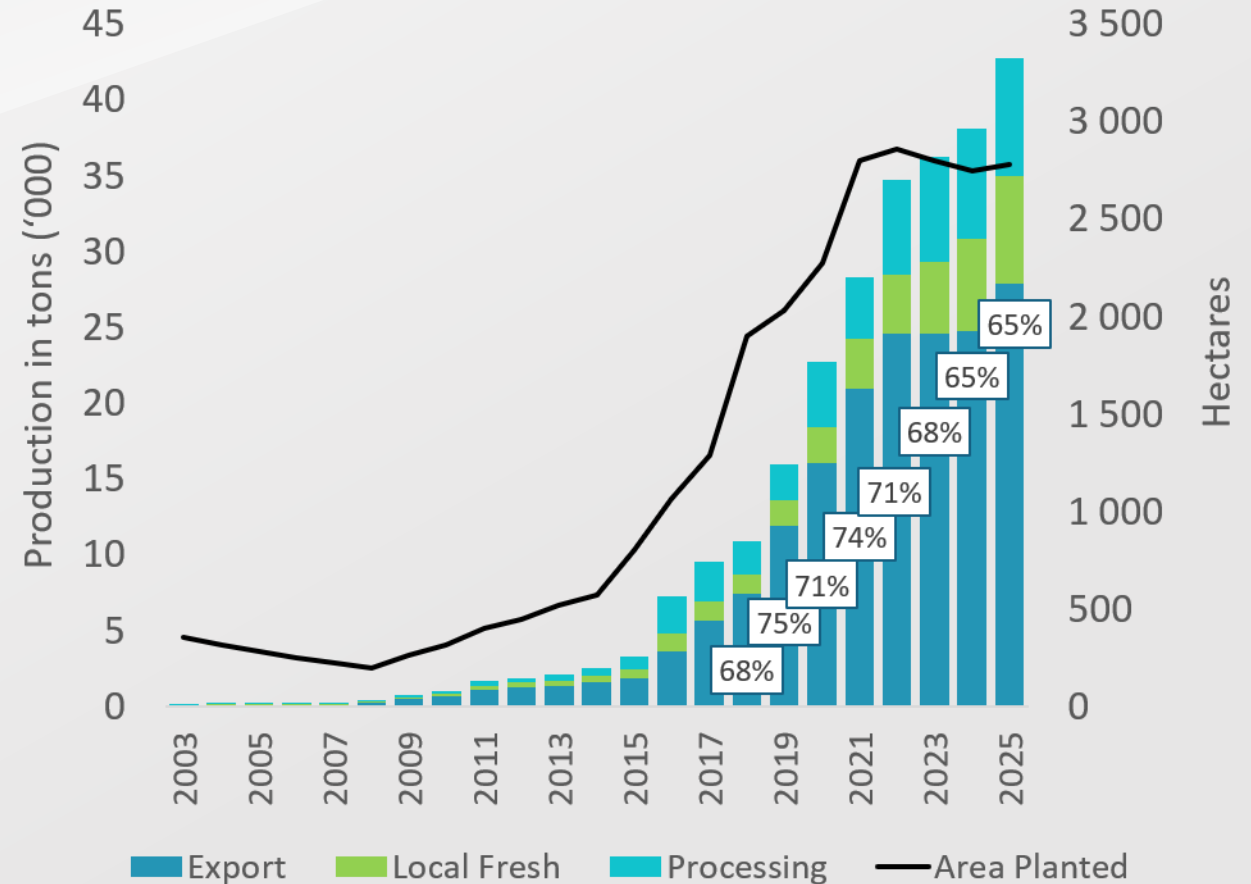
Blueberry's growth in perspective

Berries are a small industry, but growing fast and extremely labour-intensive

All SA Farm Industries (>50)

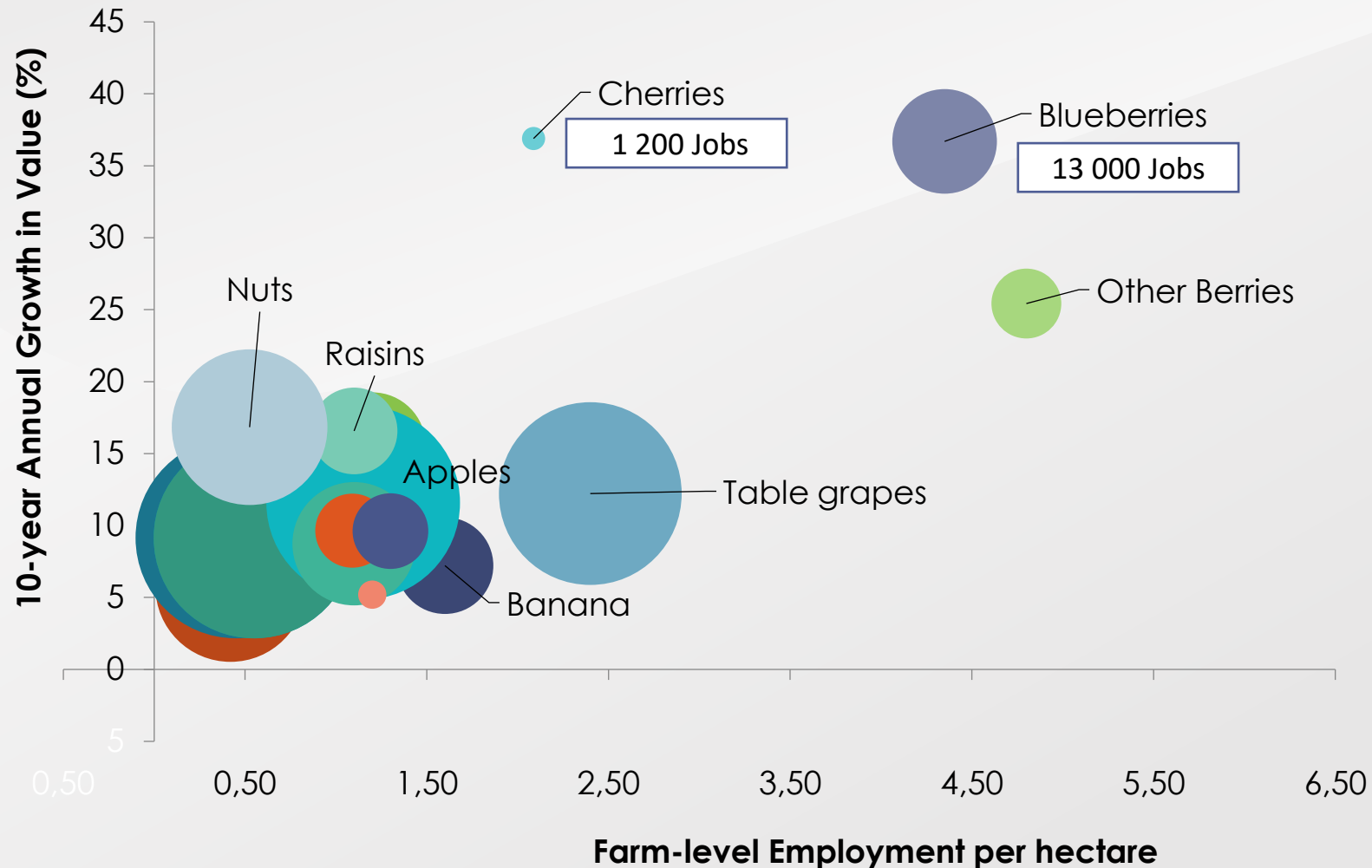


SA Blueberries



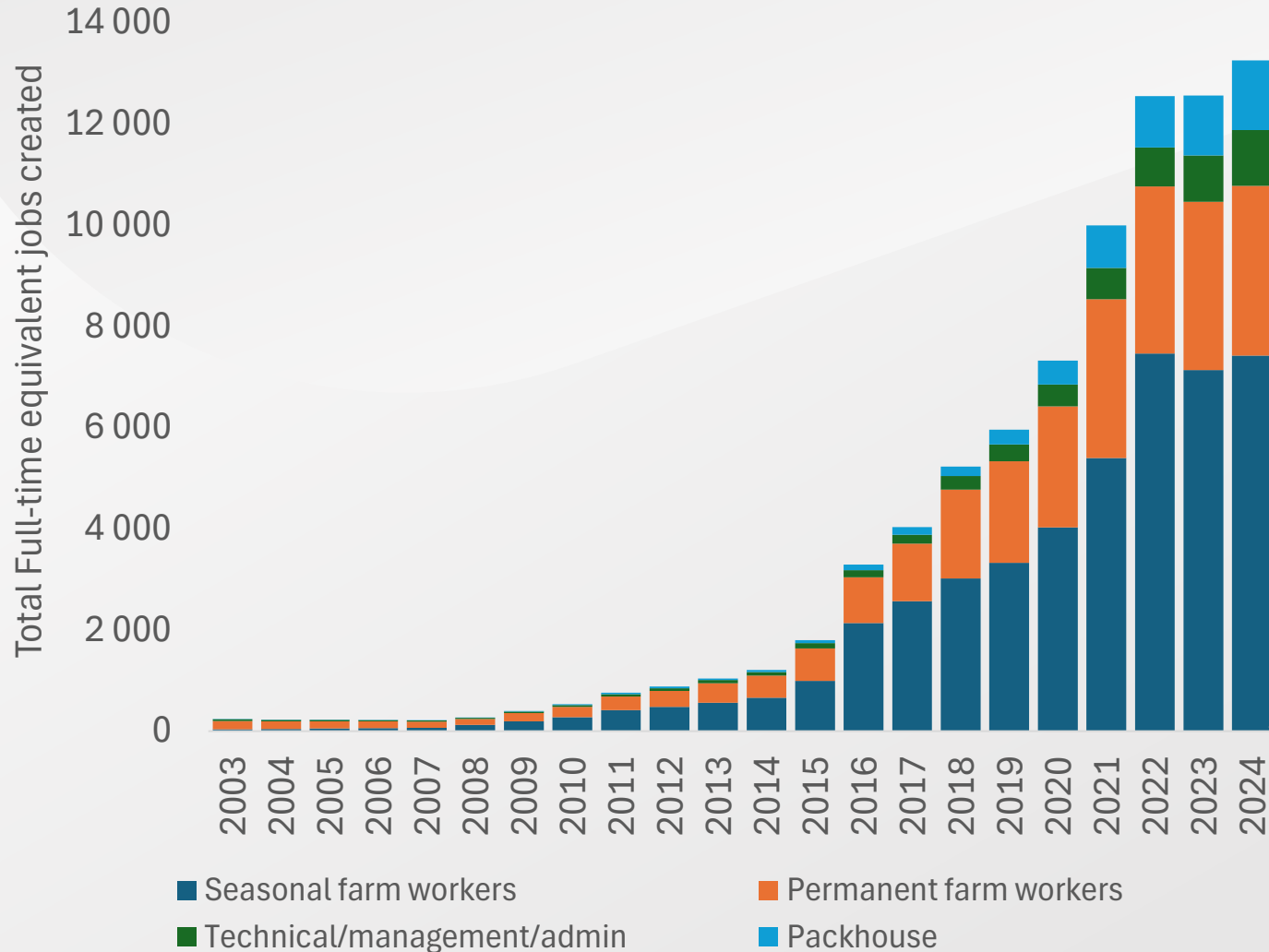
SA blueberries development case

Our Study last year confirmed the labour intensity and labour contribution



SA blueberries development case

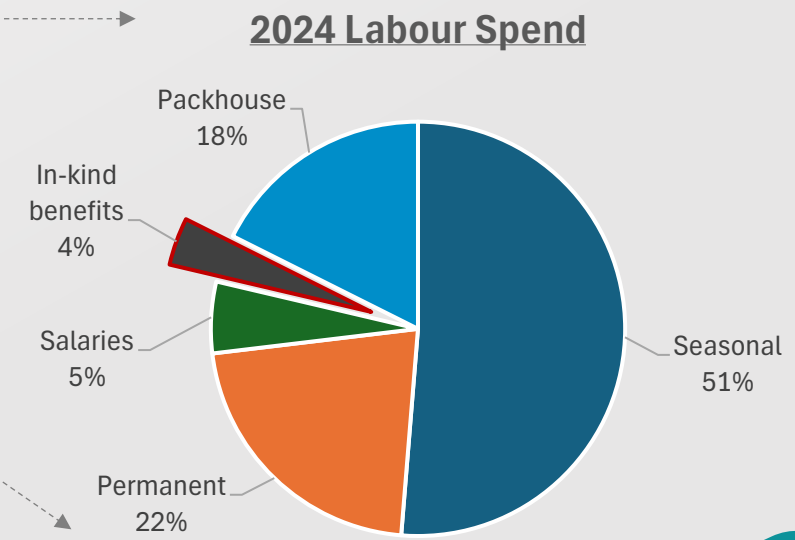
But it is not only about counting labourers, but the livelihood impact



The blueberry industry has created 13 000 jobs on farms and packhouses

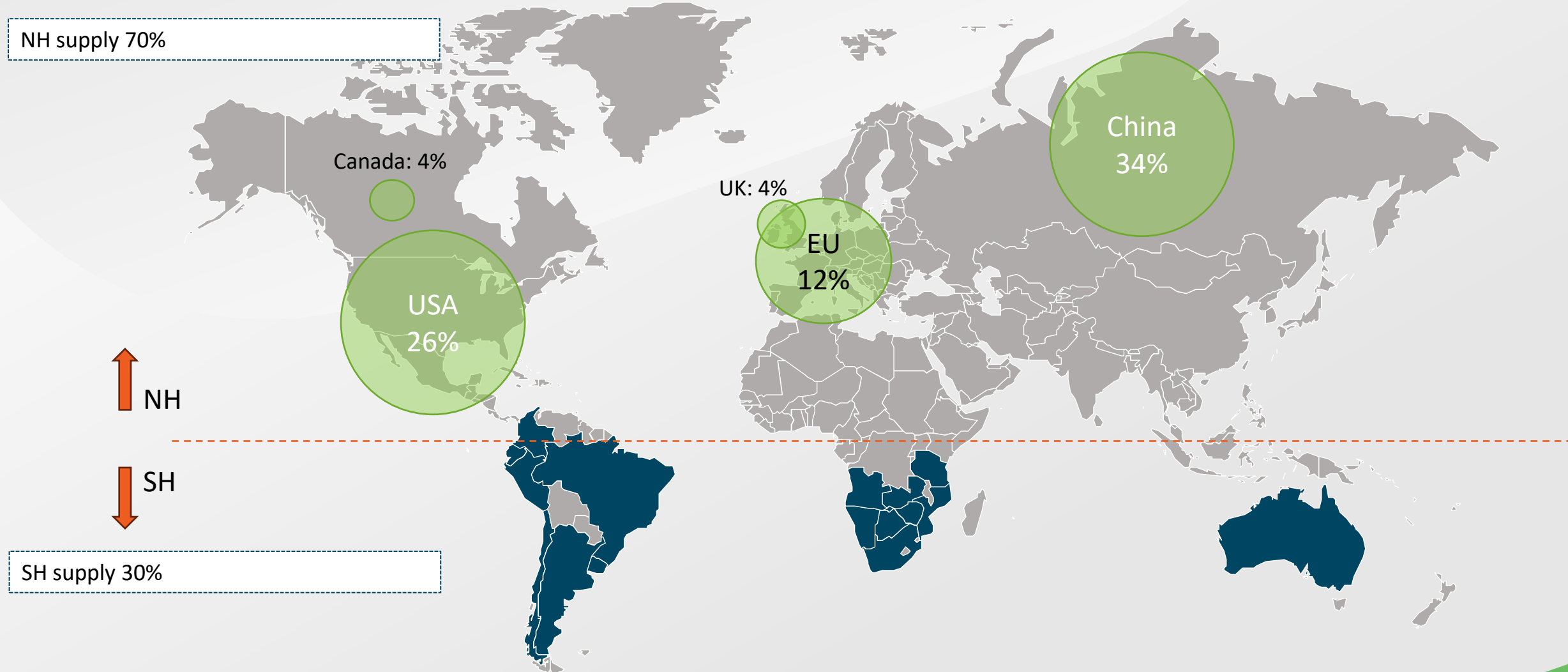
Total Wage Bill = R1.2 billion in 2024

Blueberry growers pay general farm workers, on average, around 10-15% higher than the National Minimum wage



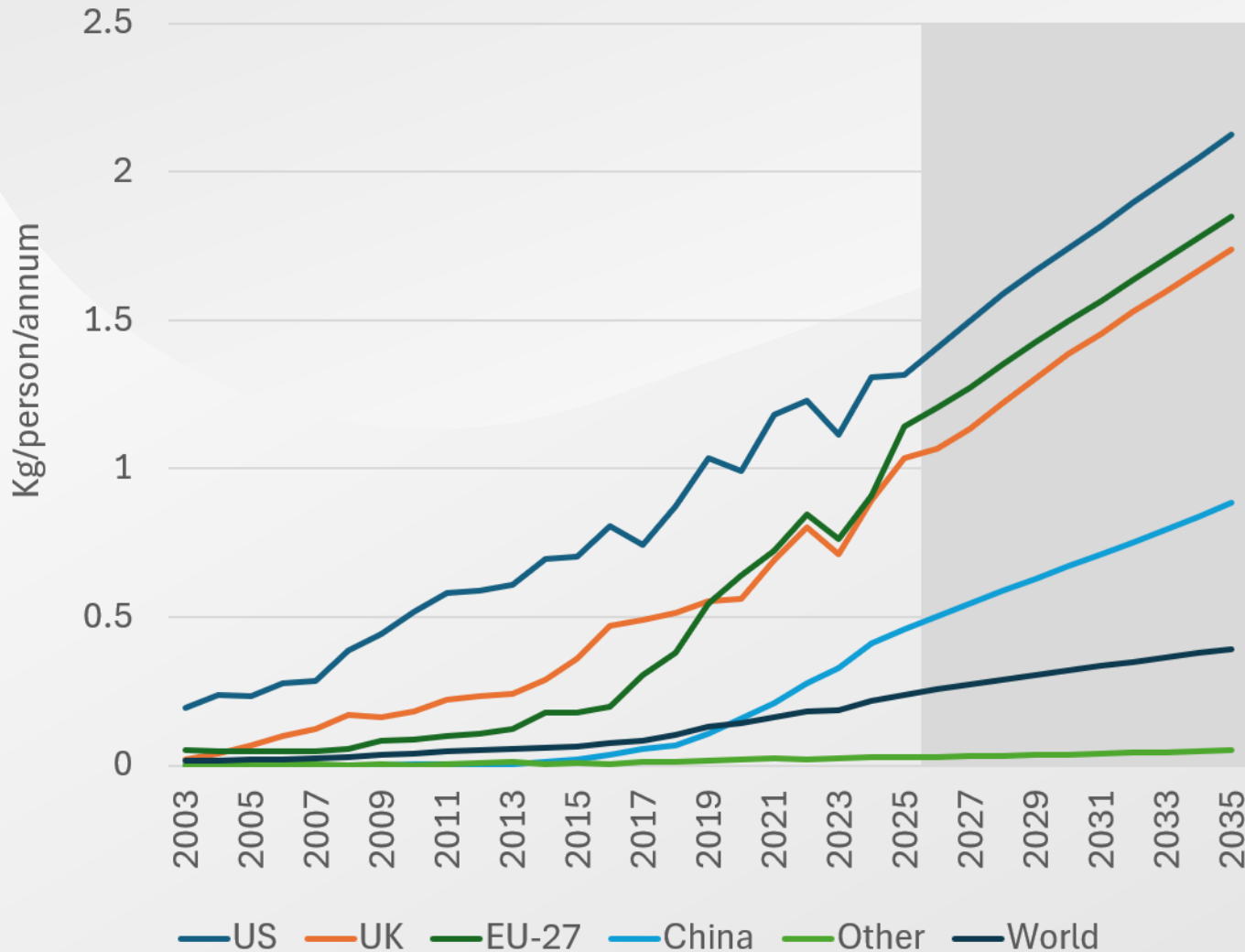
Global Demand & Distribution for fresh blueberries

Fresh consumption increased 10% in 2025, increasing to 1.9 million tons



Global Demand Outlook

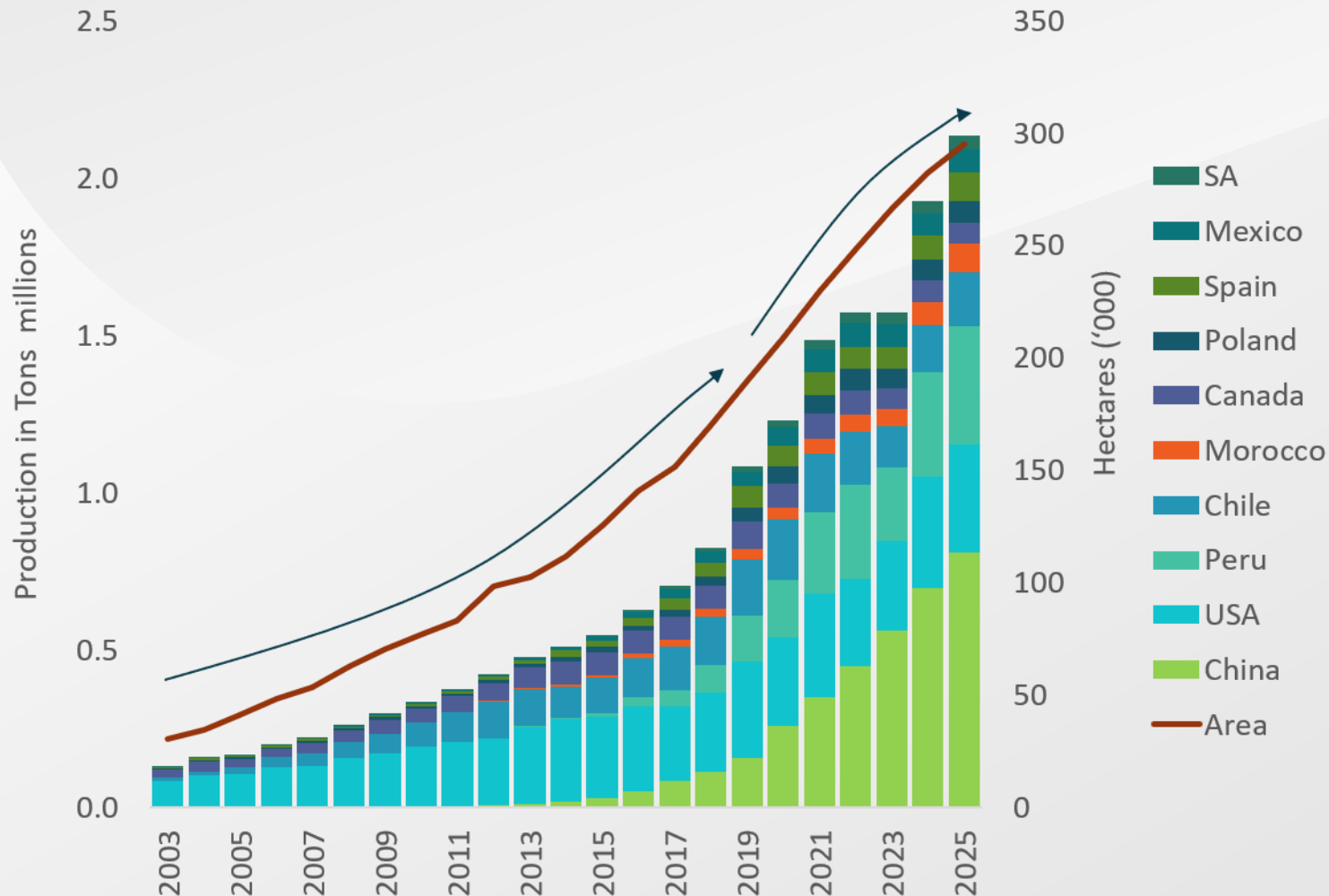
Although Demand is still growing fast, it will be at a slower pace as the market matures



Market	Fresh tons 2024	Fresh tons 2025	10-year growth (CAGR)	
			2015-2025	2026-2036
US	444 472	449 136	7.1	6.0
UK	61 972	71 934	11.9	5.1
EU27	409 334	515 150	20.5	5.4
China	580 756	646 285	35.6	5.0
Canada	70 765	77 438	1.5	6.9
Other	154 143	154 661	13.9	5.8
Total	1 721 442	1 914 605	16.0	6.5

Global Blueberry Supply

Production showed mixed results, but most countries experienced Y-o-Y growth



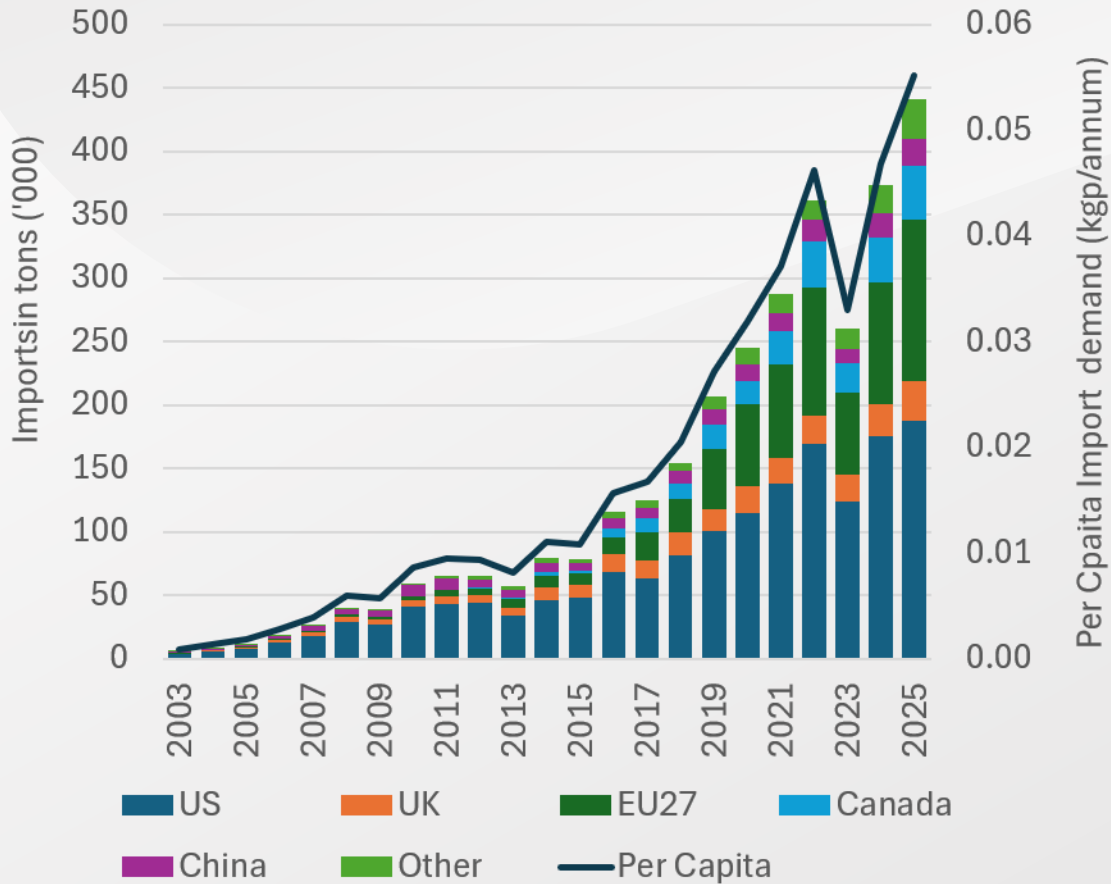
Global production updates:

- Global production increased by 10% from 2.1 to 2.36 million tons in 2025
- Peru experienced a nuanced recovery, starting well but then fading (still 15% growth).
- Chile had its first good crop in three years.
- China's numbers continue to be dodgy, but still fast growth without evidence.
- EU countries had a decent season (8% growth)
- North Americans had a challenging season with negative growth
- SA had a good season with yield gains and market prices holding above expectations

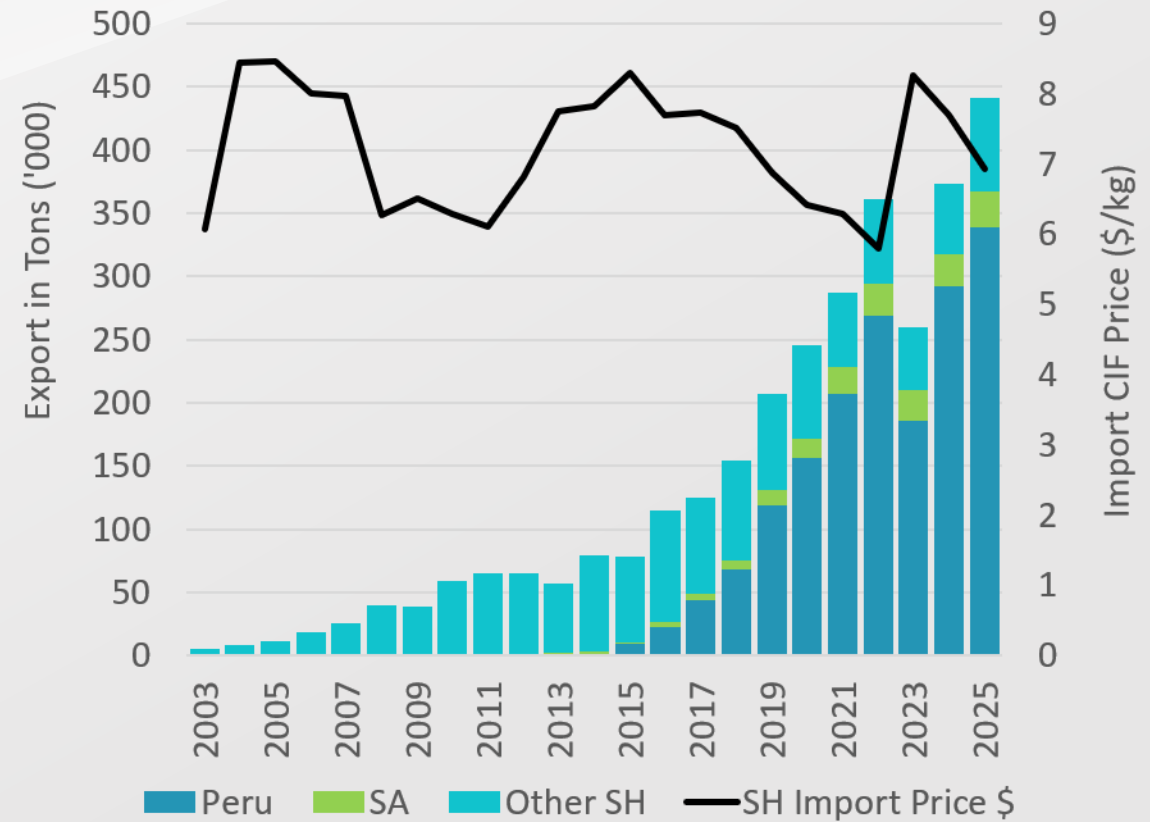
Southern Hemisphere market dynamics

Someone in the Importing country is buying from an SH exporting supplier in SA market window (August to Jan)

SH Import Demand

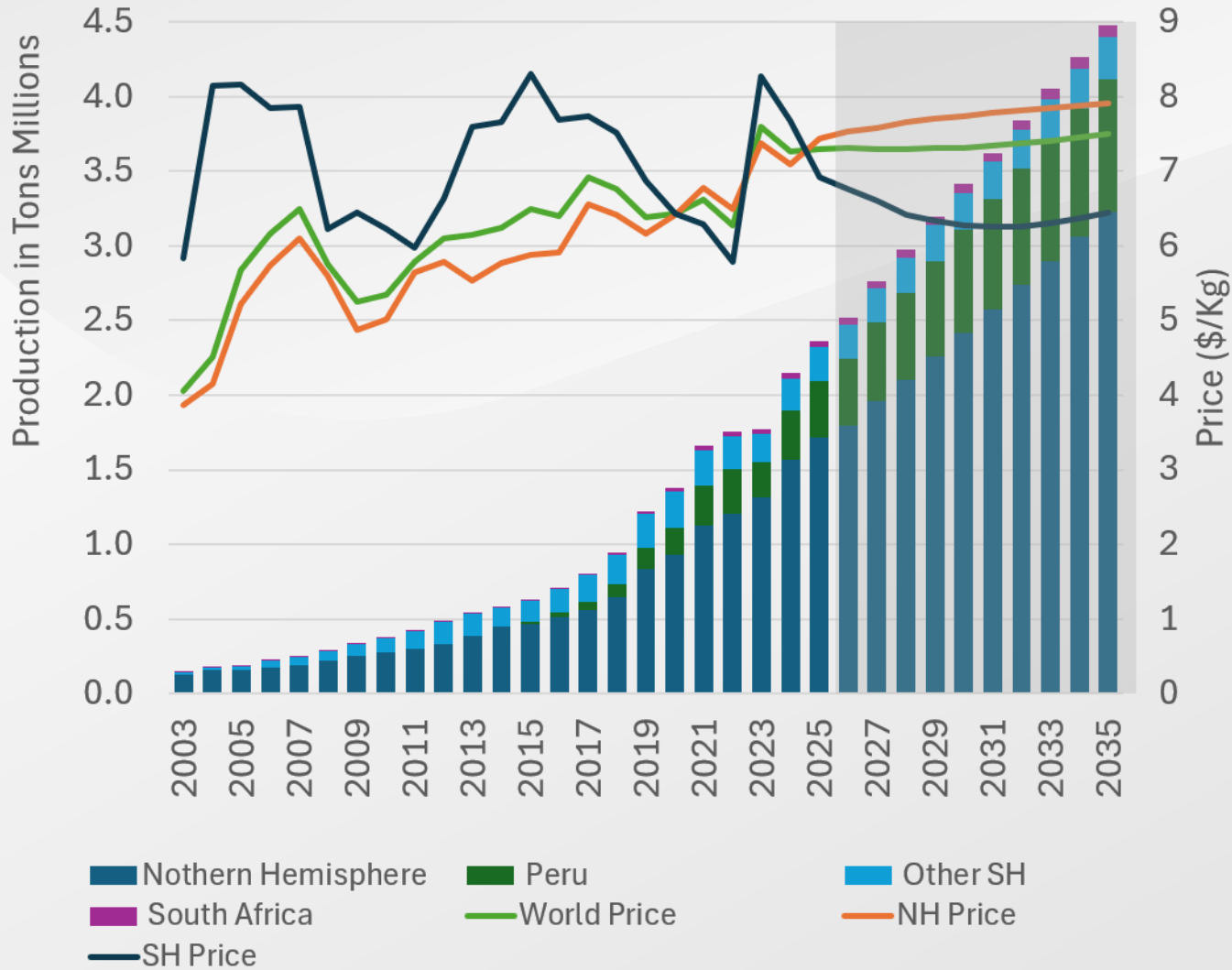


SH Export Supply



Global Supply Outlook

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SA Outlook Assumptions

These assumptions will be tested by the Iran conflict and the economic impact on markets, especially Rand exchange, input cost prices and logistical costs

Indicator	2020	2021	2022	2023	2024	2025	2026	2027	...	2035
Real GDP Growth (%)	-6.2	4.9	2.1	0.8	0.5	0.8	1.3	1.5		1.5
CPI (%)	3.3	6.4	6.9	6.0	5.0	3.5	4.0	3.8		3.1
Prime Interest Rate (%)	7.9	7.0	8.6	11.4	11.7	10.8	10.5	10.2		9.0
Exchange Rate (ZAR / USD)	15.4	15.4	17.4	18.4	18.1	17.4	16.9	17.1		19.0
Brent Crude Oil (USD / Barrel)	42.8	70.8	99.1	82.2	79.9	67.9	87.9	72.9		70.0

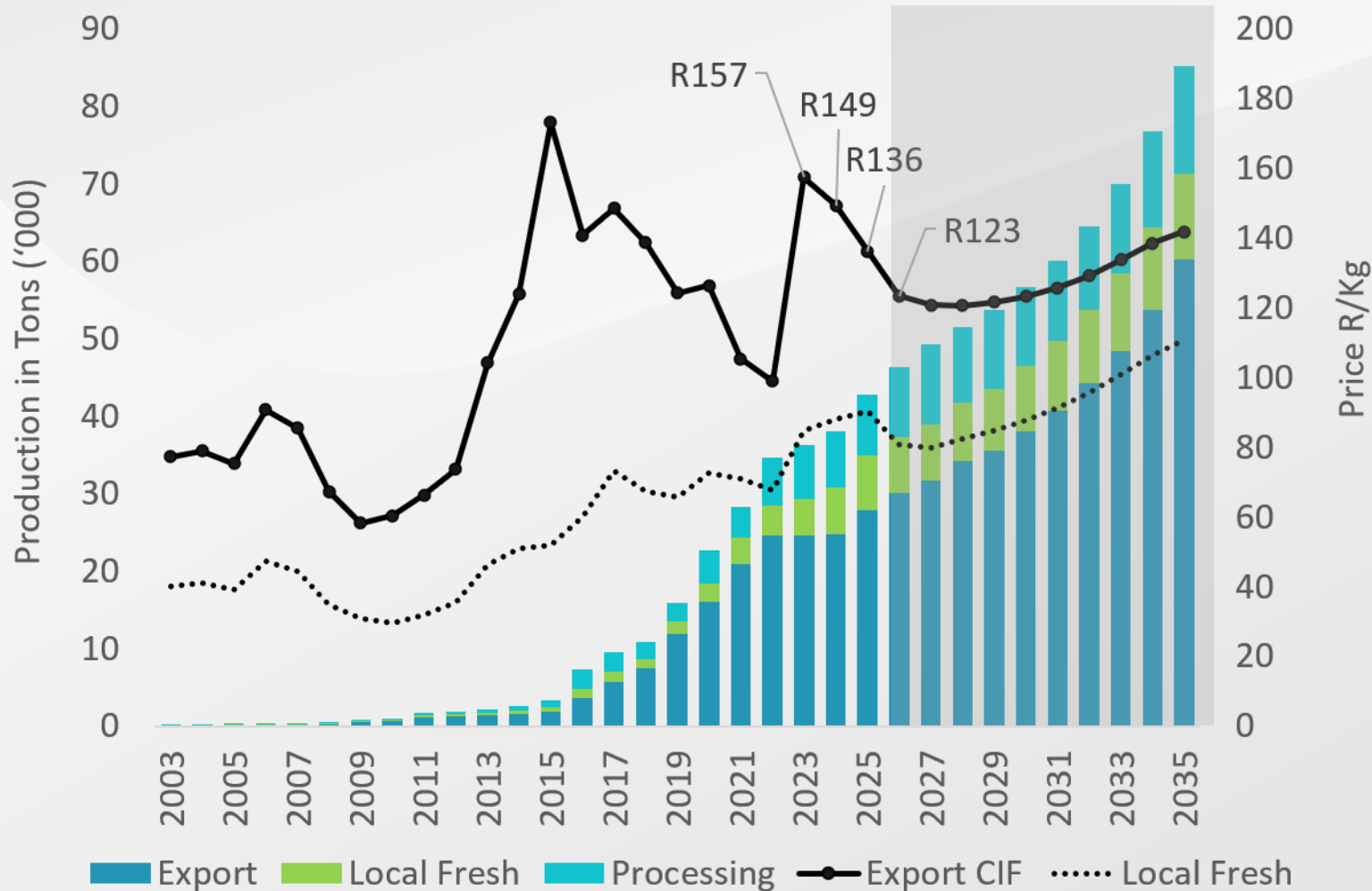
SA economy grows faster than pre 2025 levels

Rand depreciation but at slower pace compared to last year

We assume the cost of fuel and logistics increases, but Iran's impact is temporary

SA 2025 Season Review and Outlook

Better than expected season for SA driven by big crop (yield), which made up for declining export prices. Now more bullish about SA growth over the Outlook



SA Season Review

Total production increased 12% from

Indicator	2024	2025
Total tons	38 097	42 791 (13%)
Export	6 095	7 214 (17%)
Local fresh	7 238	7 800 (8%)
Hectares	2 750	2 778 (1%)
Yield (T/ha)	13.9	15.4 (11%)

Export CIF Prices

2025 Baseline	R148/kg	R131/kg
Actual	R149/kg	R136/kg
Survey	R154/kg	R136/kg

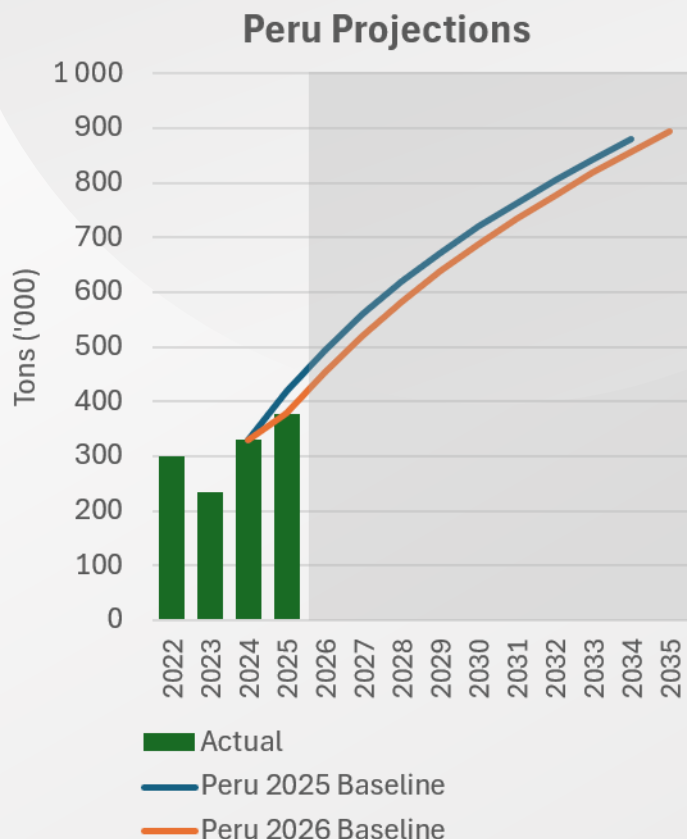
Outlook economic drivers

Better price prospects have three underlying factors baked into the Baseline

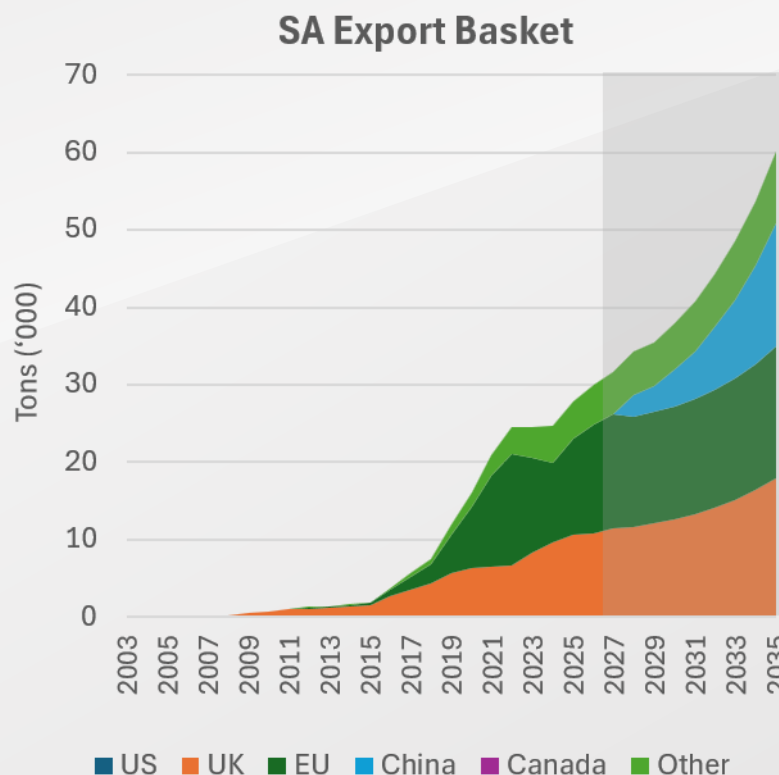
1) Peru's growth slows

2) Market Access enables diversification

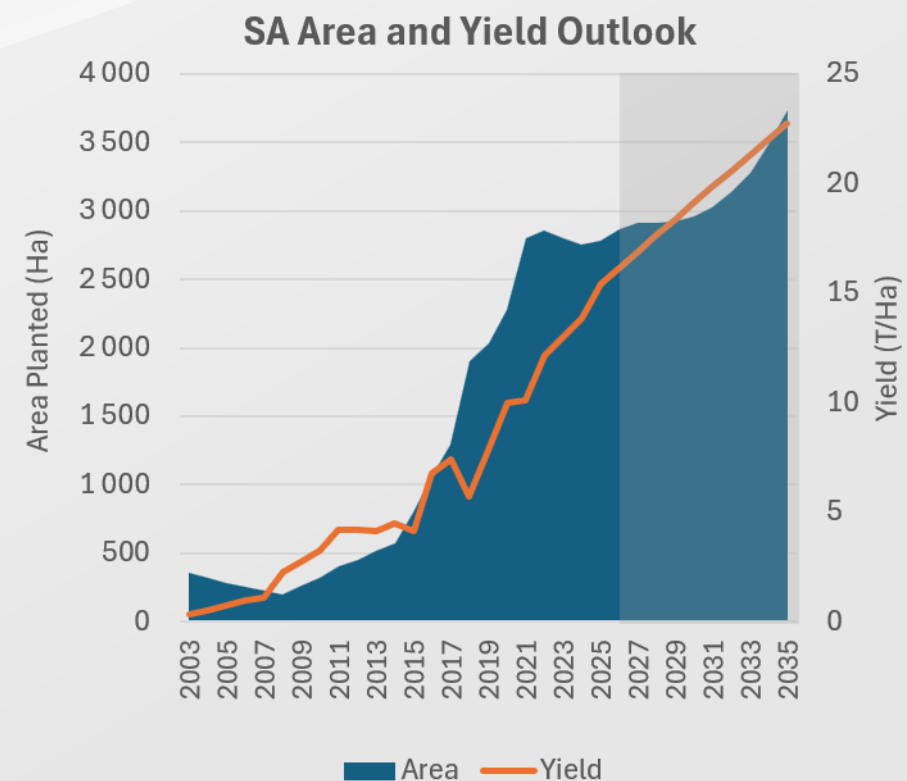
3) Enhanced profitability leads to investment



IBO 2024 = 25 920 ha
Proarandanos = 20 656 ha



China market opening causes EU diversion (Assume 30% to 0% tariff)



Well-positioned farms expand with better varieties

Farm profitability over the Outlook

Our three typical farms explained

The Baseline Output is now used to link to our farm simulation models:

- Location
- Intensity and size
- Capital base
- Packout and pricing
- Relative cost structure

WC Intensive Farm (30 ha farm)

Open-air	0%
Shade-netting	20%
Plastic tunnel	80%
Substrate in pots	70%
Soil	30%
Avg. yield (ton/ha)	27 t/ha

WC Extensive Farm (>50 ha farm)

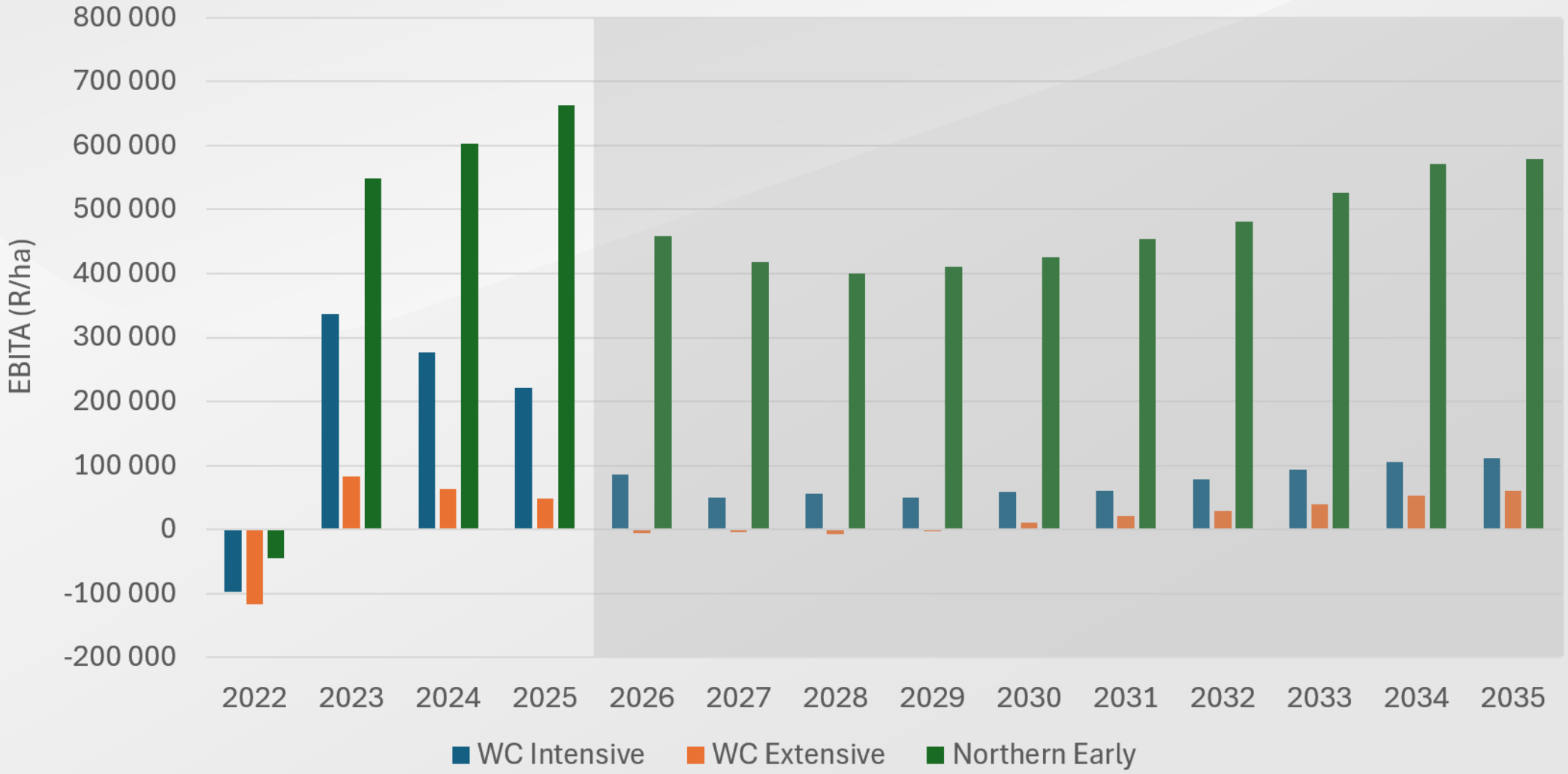
Open-air	70%
Shade-netting	30%
Plastic tunnel	0%
Substrate in pots	0%
Soil	100%
Avg. yield (ton/ha)	15 t/ha

Northern Early Farm (30 ha farm)

Open-air	30%
Shade-netting	50%
Plastic tunnel	20%
Substrate in pots	70%
Soil	30%
Avg. yield (ton/ha)	24 t/ha

Farm profitability over the Outlook

Our three typical farms



Concluding Remarks

Takeaways from the 2026 Blueberry Baseline

- The future looks better for the SA industry after another good season in 2025
- Please don't go and plant thousands of hectares because of my views, and cause another price cliff!
- Key fundamentals to prepare for an uncertain future:
 - 1) Prudent varietal selection and expansion in the right areas where proof of concept clearly works.
 - 2) Cost Discipline: Aggressively pursue cost containment per hectare without compromising plant health or quality.
 - 3) Market access to China, India and others is critical to pursue and succeed for the Baseline to become reality, and once they open, exporters will need some boldness (extra risk) to send products there.



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