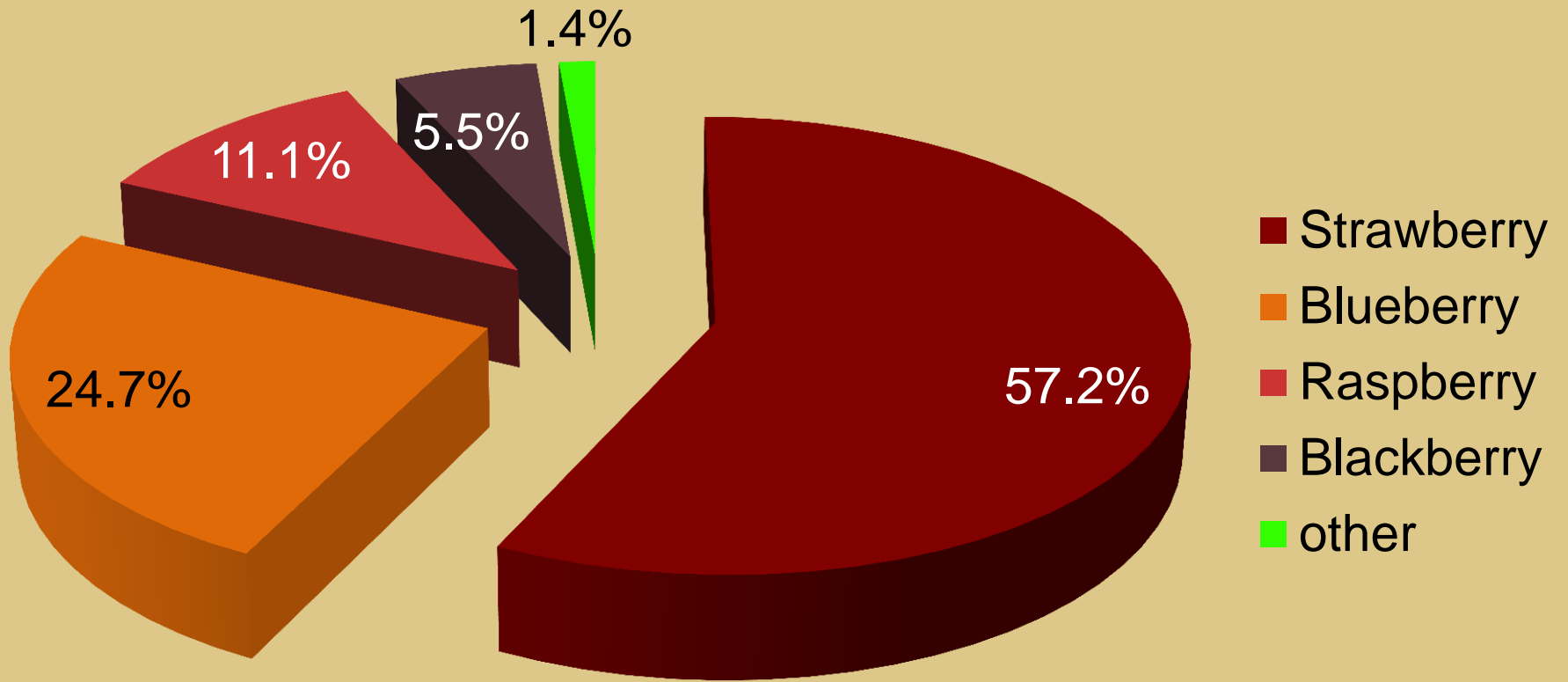


Blackberry Market Overview

*Mark Gaskell, Farm Advisor
UCCE - San Luis Obispo*



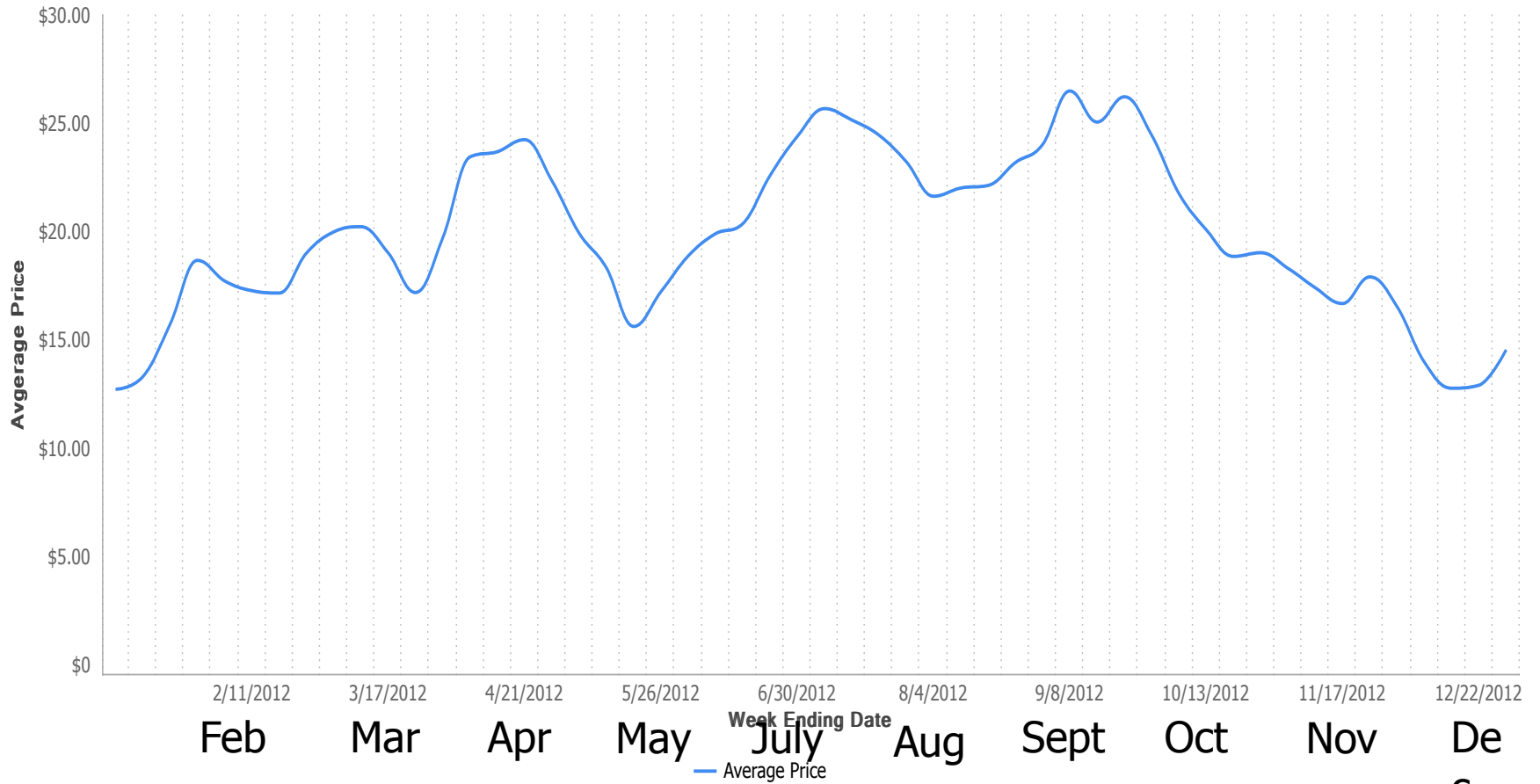
U.S. Sales of Small Fruits - 2008



Blackberry - All US terminal markets

\$20.34

Average Prices Trend

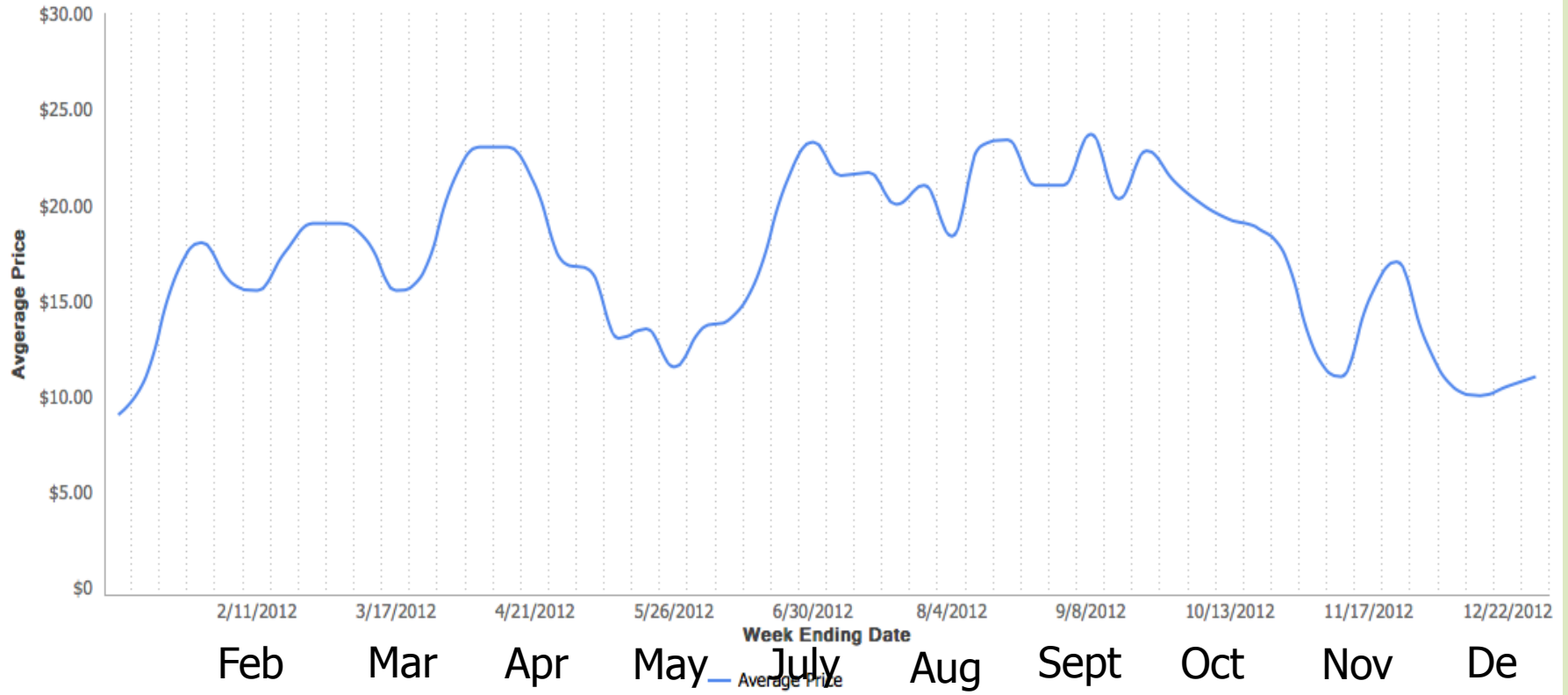


C

Blackberry – LA Terminal Market

\$18.74

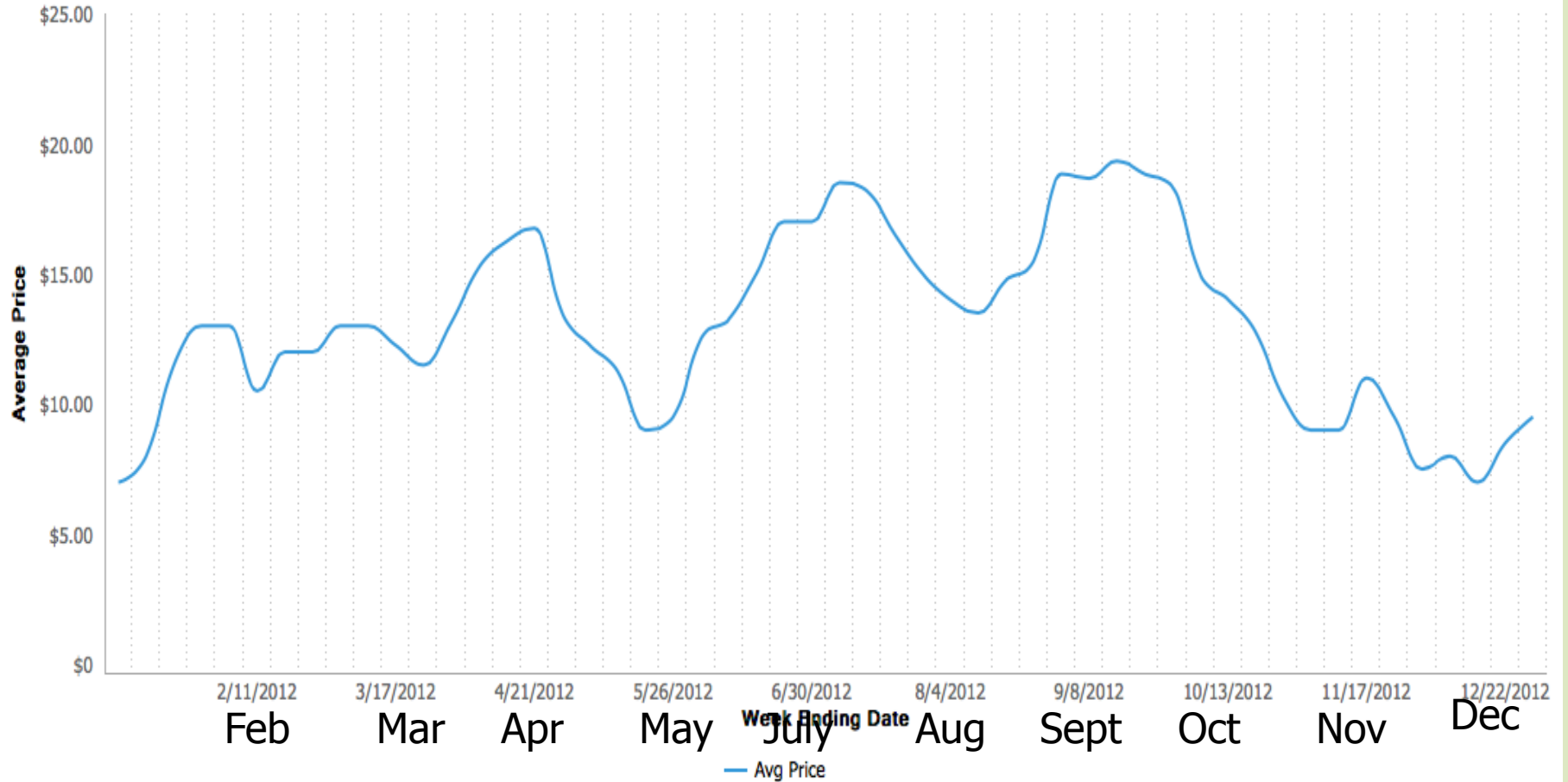
Average Prices Trend



Blackberry – all shipping points

\$14.05

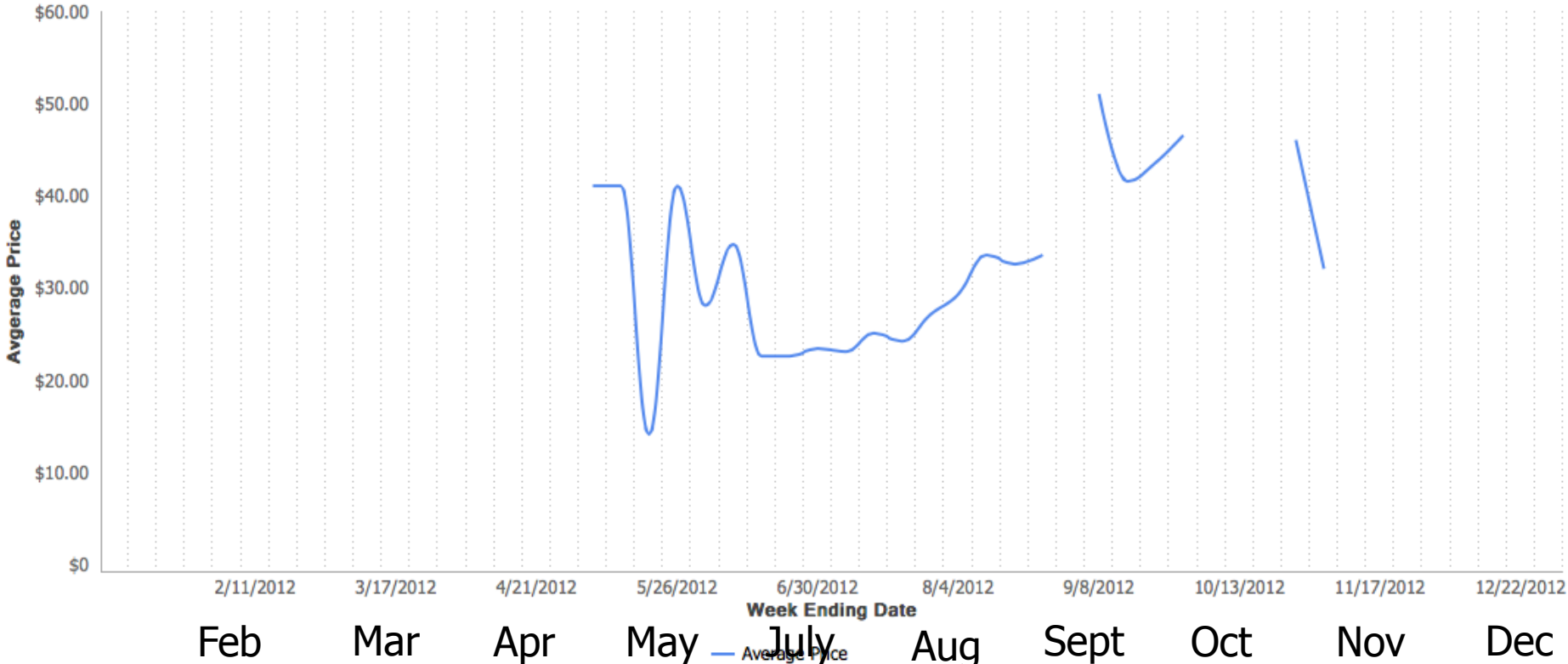
Average Price Trend



Blackberry – ORGANIC - LA / SF Terminal Markets

\$30.77

Average Prices Trend



Blackberries 2013

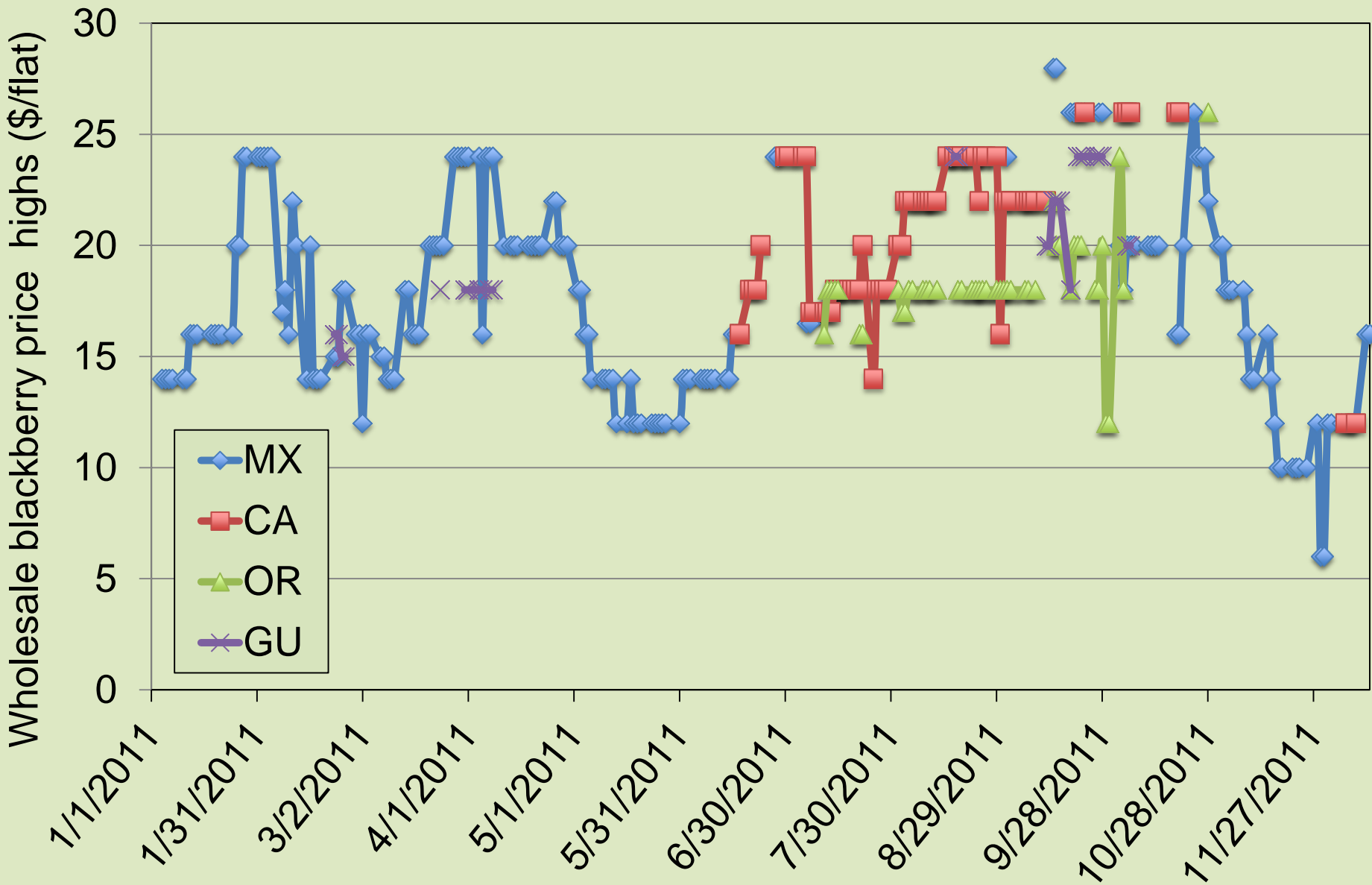
- *Among Fresh Trends' top 20 most popular fruits*
- *younger shoppers (age 21-39) more likely to buy than older shoppers*
- *Upper income >>> lower income*
- *Western more than Eastern US*
- *32% of blackberry buyers bought organic at least some of time*

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?

*Weekly Fresh Blackberry Wholesale Prices (highs)
Los Angeles Terminal Market - 2011*



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

	2004			2010			2011		
	Area planted (ha)	Production (MT)	Yield (MT/ha)	Area planted (ha)	Production (MT)	Yield (MT/ha)	Area planted (ha)	Production (MT)	Yield (MT/ha)
Blueberry	60	280	4.67	402	1,059	9.99	783	6,704	10.54
Raspberry	315	3,045	10.80	1,217	14,344	16.04	1,345	21,468	16.20
Strawberry		177,230	28.02	6,555	226,657	36.08	7,005	228,900	32.80
Blackberry	2,198	26,697	12.48	8,188	61,558	9.63	11,297	135,563	12.64
Total:	9,038	207,251		16,361	303,618		20,430	392,634	

Raspberry Production - Mexico

Top States	2011			2012 * Estimates		
	Area planted (ha)	Production (MT)	Yield (MT/ha)	Area planted (ha)	Production (MT)	Yield (MT/ha)
Baja California	160	4,640	29	238	7,590	31.9
Jalisco	939	13,493	14.4	1,395	22,105	15.8
Michoacan	179	2,821	15.8	266	4,626	17.4
Other	67	513		100	1,392	
Total:	1,345	21,467		2,000	35,713	



Source: SIAP and Aneberries
Gain Report MX 3030, USDA-FAS March 2013

Blackberry Production - Mexico

Top States	2011			2012 * Estimates		
	Area planted (ha)	Production (MT)	Yield (MT/ha)	Area planted (ha)	Production (MT)	Yield (MT/ha)
Jalisco	389	4,357	11.8	428	5,550	13
Michoacan	10,752	129,404	12.7	11,827	165,224	14
Other	156	1,802		172	3,034	
Total:	1,345	135,563		12,426	173,808	



Crop	Protected Ag (tunnels) Share	Ave. Labor Reqt. (worker/ha)
Strawberry	50%	7
Raspberry	90%	7.8
Blackberry	40%	10
Blueberry	50%	7.8

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

*Mark Gaskell, Farm Advisor
UCCE - San Luis Obispo*