



FLORIDA DEPARTMENT OF AGRICULTURE AND CONSUMER SERVICES
Division of Marketing and Development

Total U.S. Market for Fresh Blueberries

Blueberry Imports from Mexico Distort Market Conditions and Injure U.S. Producers

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Directive and Guidelines

This report was developed in response to an International Trade Commission investigation into the market environment for fresh, chilled, or frozen blueberries. A selection from the investigation announcement follows:

Following receipt of a request from the United States Trade Representative (“USTR”) on September 29, 2020, the Commission has instituted Investigation No. TA–201–77 pursuant to section 202 of the Trade Act of 1974 (“the Act”) to determine whether fresh, chilled, or frozen blueberries are being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article.

Data Sources and Methodology

The data used to create this report came from USDA-AMS’s Market News publications and data portal. FDACS synchronizes new data weekly from Market News’s commodity movement, terminal market, shipping point, and retail pricing datasets for the following commodities: avocados, beans, blueberries, broccoli, cabbage, cantaloupe, celery, Chinese cabbage, sweet corn, cucumbers, eggplant, endive, escarole, lettuce (iceberg and Romaine), okra, onions, peaches, peppers (bell type and other types), potatoes (chipper and others), radishes, squash, strawberries, tomatoes (round, cherry, grape, and plum types), and watermelons (seeded and seedless types). The data are processed using Salesforce’s Einstein Analytics platform. All comparisons include the production regions of California and Mexico, as these are by far the largest specialty crop production regions in North America and because both produce nearly every specialty crop product tracked by FDACS.

Other References

This report was condensed and updated from an original report on the [impact of agricultural imports from Mexico on Florida agriculture](#).

An additional report on terminal market prices and the [effect of unfair pricing of imports from Mexico](#) is also available.

Executive Summary

As shown in Figure 1 below, imports of fresh, seasonal produce into the U.S. market from Mexico have, over the past 20 years, displaced product which was being shipped from Florida. While the total weight of fresh seasonal produce shipped into the U.S. market has increased 24% since 2000, the weight of product shipped from Florida has decreased by 47%, while the weight of produce from Mexico has increased by 188%. That Mexico's and Florida's harvest seasons are nearly identical means that, at current levels of demand, any additional product imported from Mexico harms Florida producers, either by displacing Florida product or by depressing market price. California has also experienced a decline in weight shipped, but the loss is proportionally much smaller than that experienced by Florida producers – California's weight shipped declined by 1 billion pounds, an 8.3% decline overall.

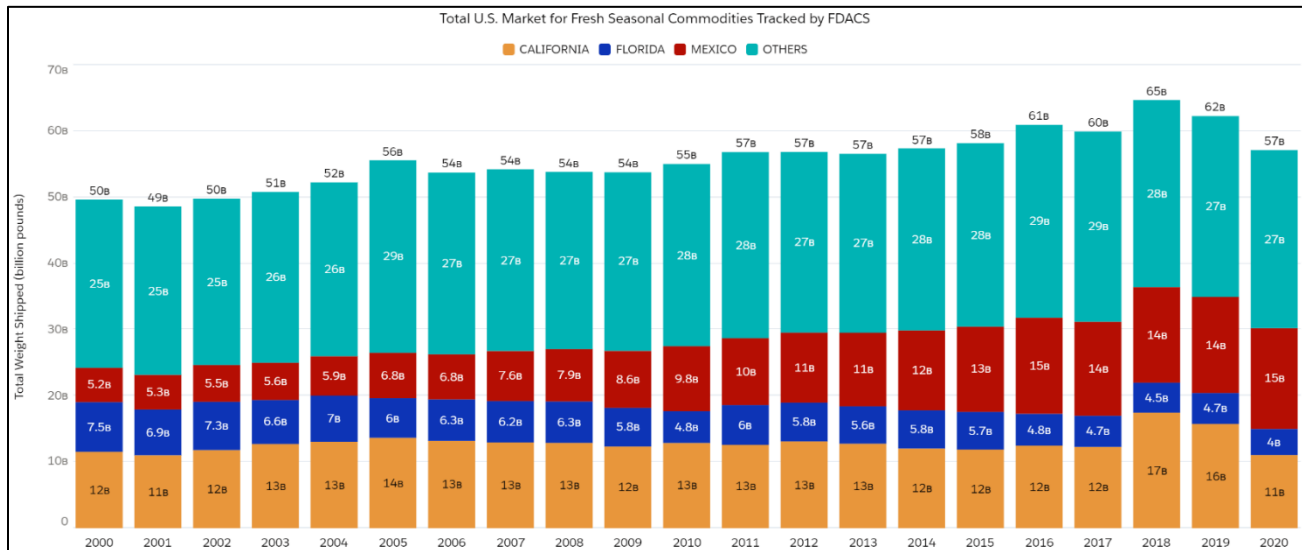


Figure 1: Shipment weight of selected perishable seasonal agricultural commodities shipped from Florida and other regions from 2000-2020.

- +218% Increase in **year-round** U.S. market share (by weight) of blueberries imported from Mexico (5.68% in 2016 vs. 18.09% in 2020).
- +171% Increase in market share (by weight) of blueberries imported from Mexico **during Florida's March – May harvest season**. Mexico's market share in 2016 was 13.11% in 2016, and 35.47% in 2020.
- 34% Decrease in value of production of Florida blueberries from 2015 to 2016. This coincided with a single-year 41% increase in the weight of imported product from Mexico. The value of the drop was **\$28 million**, equivalent to 451 jobs no longer supported, \$2.8 million in decreased indirect tax revenue, and \$55.4 million in overall negative economic impact.
- 22% **Year-round** market share for Georgia blueberry growers decreased from 8.1% to 6.4% between 2016 and 2020. Weight decreased from 44.1 million pounds to 33.1 million.
- 32% **Year-round** market share for Michigan blueberry growers decreased from 7.4% to 5% between 2016 and 2020. Weight decreased from 39.9 million pounds to 25.9 million.
- 5% **Year-round** market share of New Jersey blueberry growers was largely unchanged between 2016 and 2020, but weight shipped declined 5%, from 30.2 million pounds to 28.6 million.

Commodity-Specific Trends: Blueberries

Florida growers harvest blueberries from mid-March through May each year (Figure 2 below). The harvest window varies from year to year, but may be 6 weeks or shorter depending upon weather in Florida and the timing of shipments from other production regions. This makes the industry extraordinarily sensitive to any disruptions stemming from inclement weather, labor or supply chain issues, or rapidly increasing import volume.

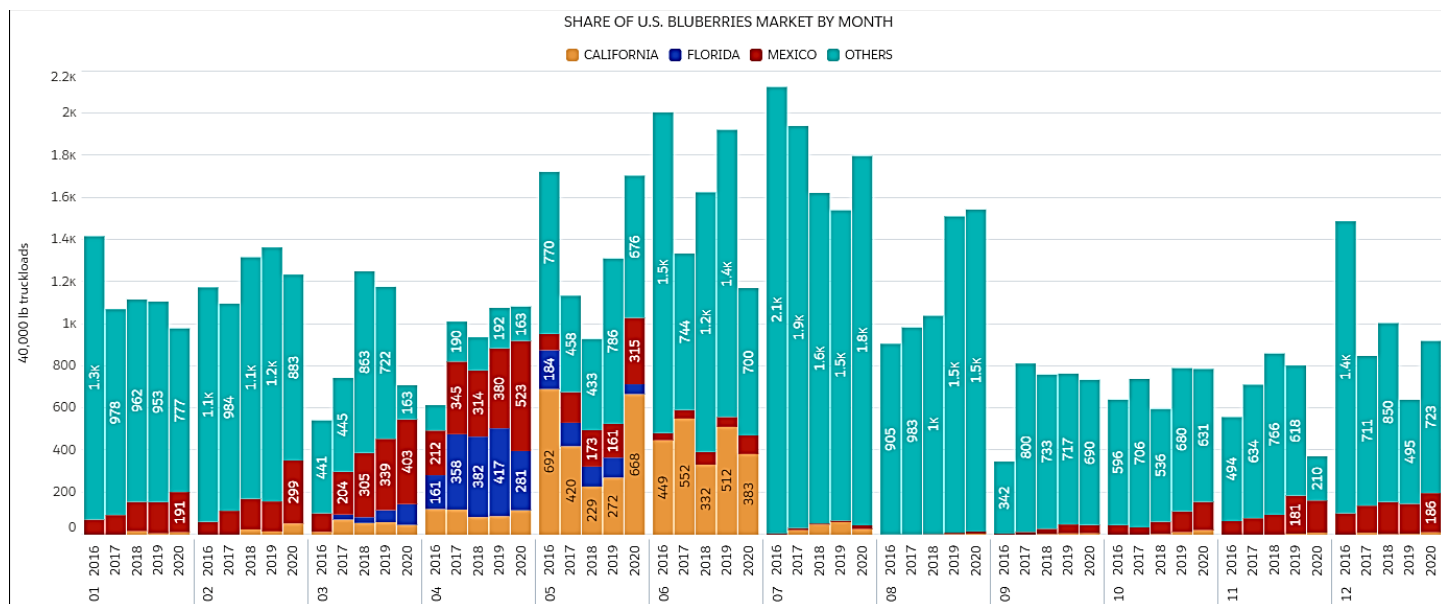


Figure 2: Monthly volume (in 40,000 pound truckloads) shipped from California, Florida, Mexico, and other regions, 2016-2020.

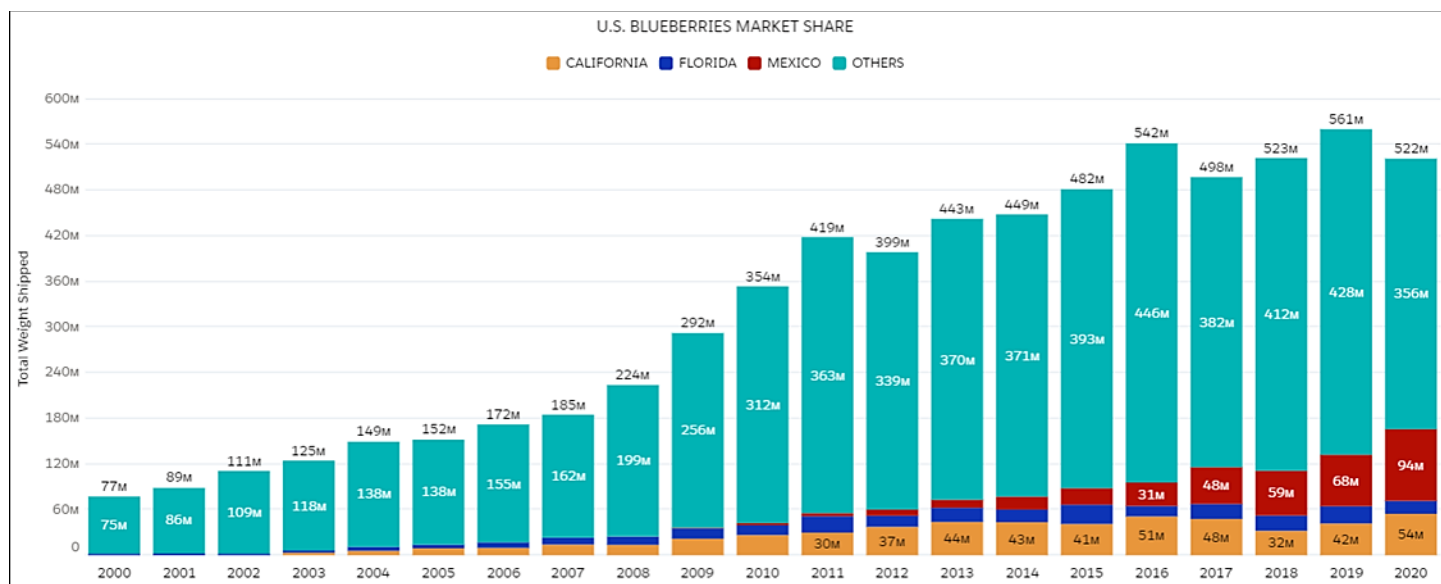


Figure 3: Annual shipment weight (in pounds) of blueberries from Florida, California, Mexico, and other regions, 2000-2020. Florida's market share loss accelerated between 2016-2020, as the total annual volume of imported blueberries from Mexico increased by 203%, from 31 million pounds to 94 million pounds.

Trends During Harvest Season

Focusing solely on the months during which Florida growers produce blueberries in volume, we see that between 2016 and 2020, Florida's blueberry market share increased from 11.97% to 12.18%, while the market share of imports from Mexico increased from 13.11% to 35.47%, more than doubled from 2016. The percentage of product from California during these months decreased slightly from 28.72% to 23.74%.

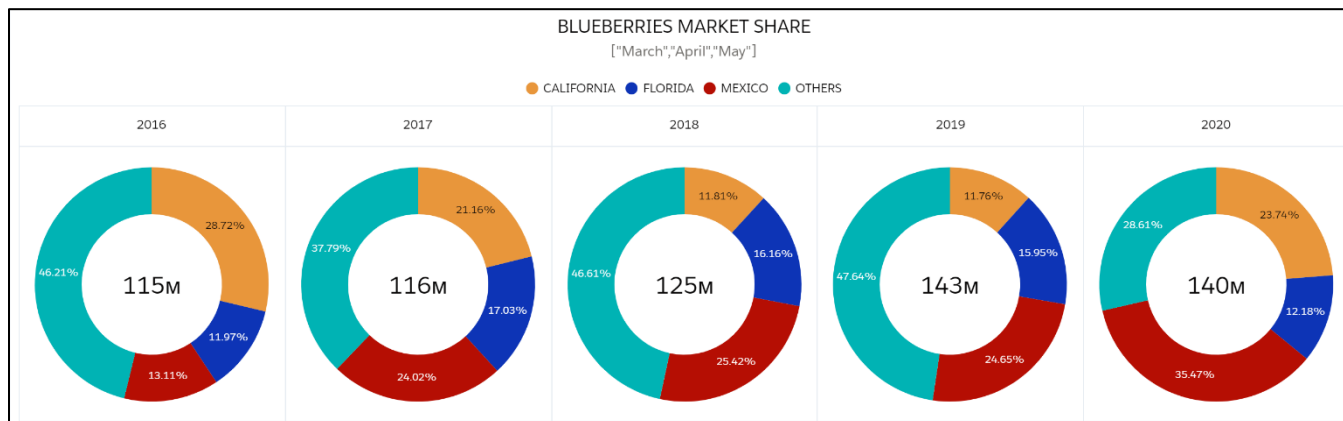


Figure 4: Market share (by weight shipped) of Florida, California, Mexico, and other regions for fresh blueberries during Florida's March-May harvest window, 2016-2020.

March

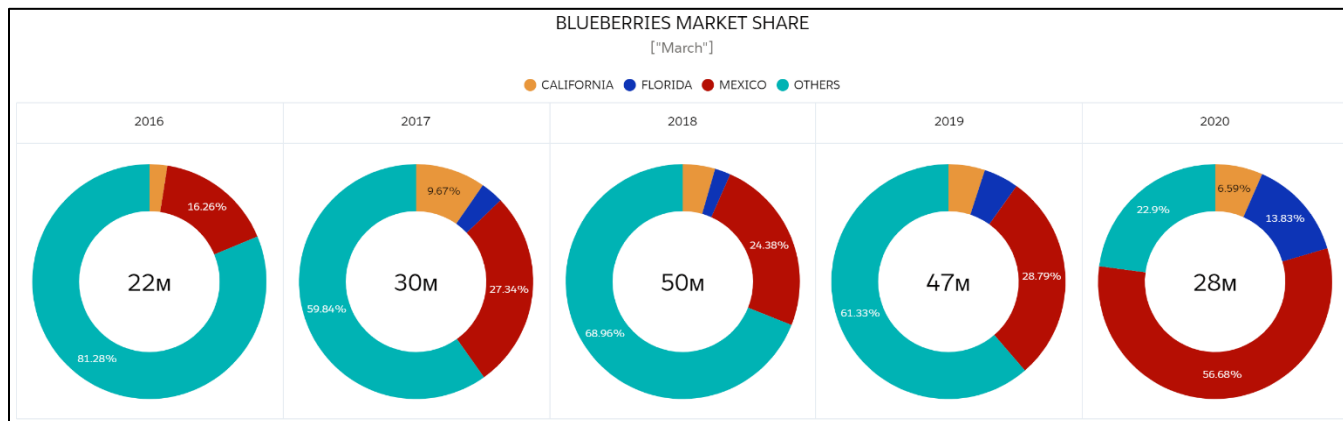


Figure 5: Market share for fresh blueberries in March of 2016-2020. Florida's market share increased slightly from insignificant production in 2016 to 13.83% in 2020. Imports from Mexico increased from 16.26% of the market to 56.68%, while California product increased slightly from 2.46% to 6.59%.

April

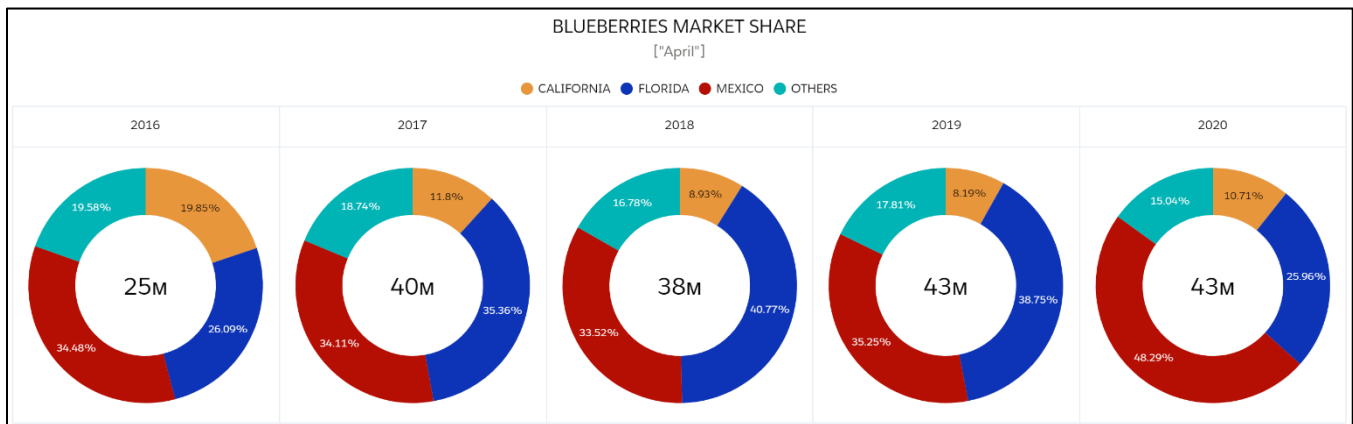


Figure 6: Market share for fresh blueberries in April of 2016-2020. Florida's market share decreased slightly from 26.09% to 25.96%. Imports from Mexico increased from 34.48% of the market to 48.29%, while California product decreased from 19.85% to 10.71%.

May

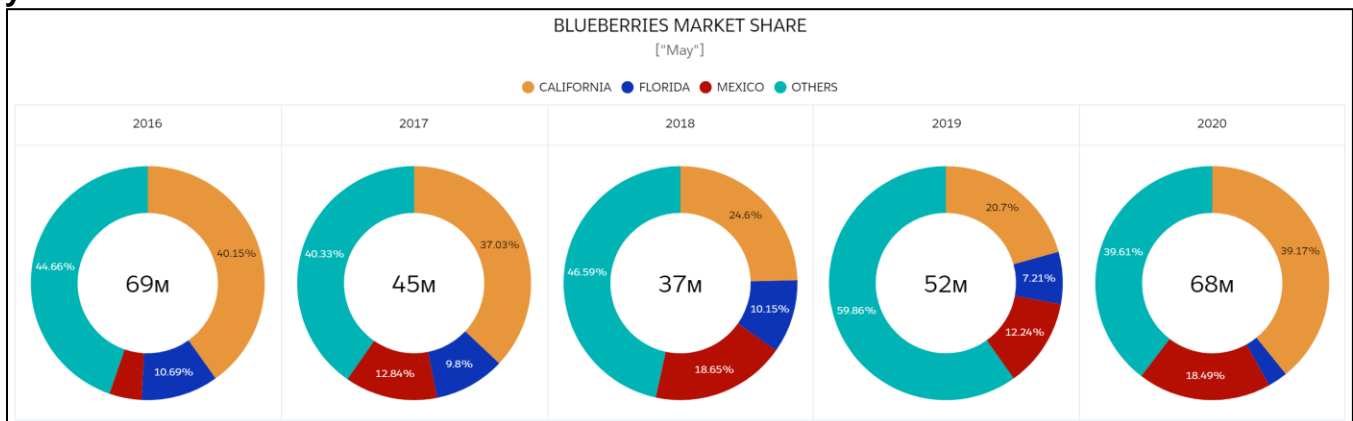


Figure 7: Market share for fresh blueberries in April of 2016-2020. Florida's market share decreased from 10.69% to 2.74%. Imports from Mexico increased from 4.5% of the market to 18.49%, while California product decreased from 2016-2019, then rebounded in 2020 to 39%, approximately its market share in 2016.

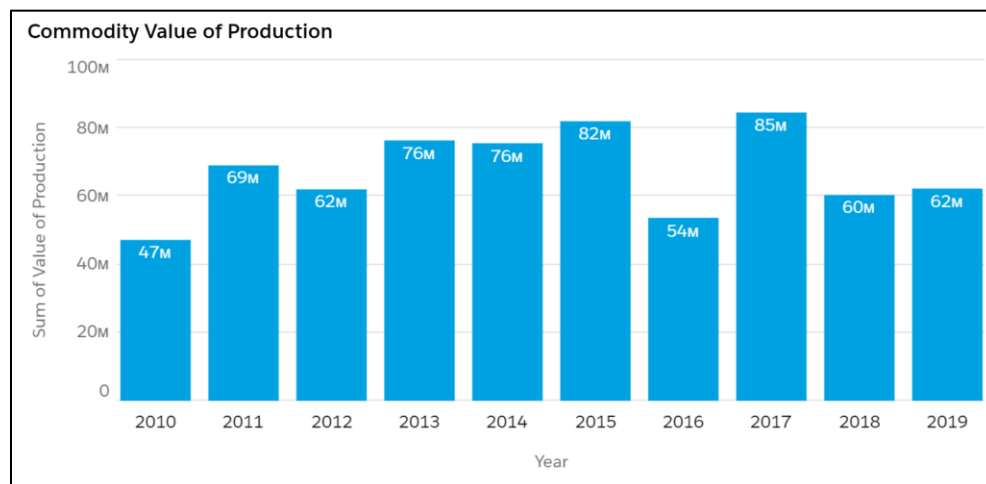


Figure 8: Value of production of Florida blueberries from 2010 – 2019 (2020 value of production was not available at the time of this writing). The appearance of large volumes of imported blueberries from Mexico in 2016 coincides with a drastic increase in the volatility of Florida's value of production.

Other State Perspectives

Georgia

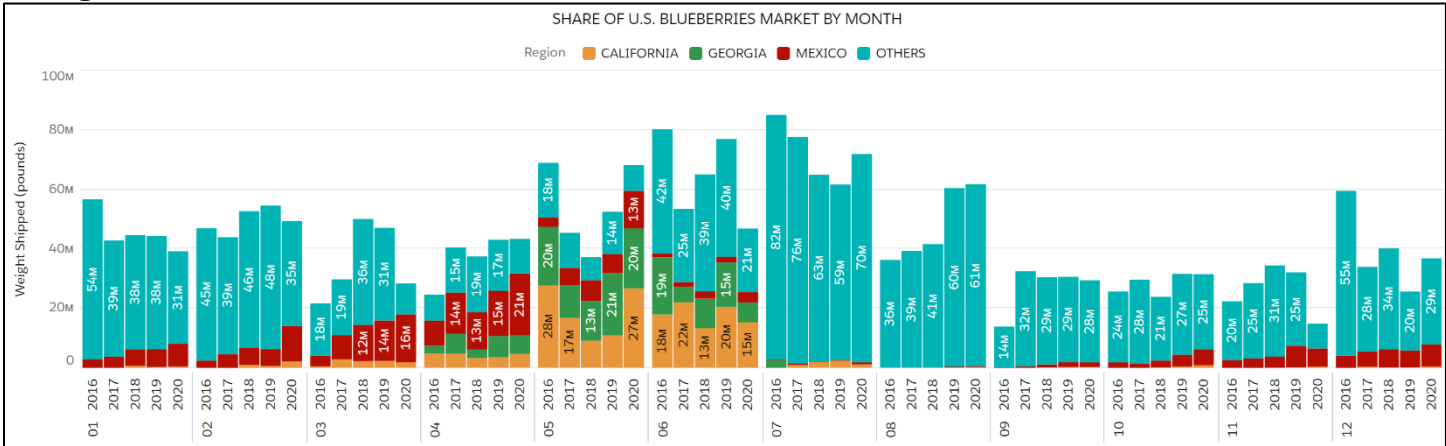


Figure 7: Georgia producers harvest blueberries in significant volume in April, May, and June.

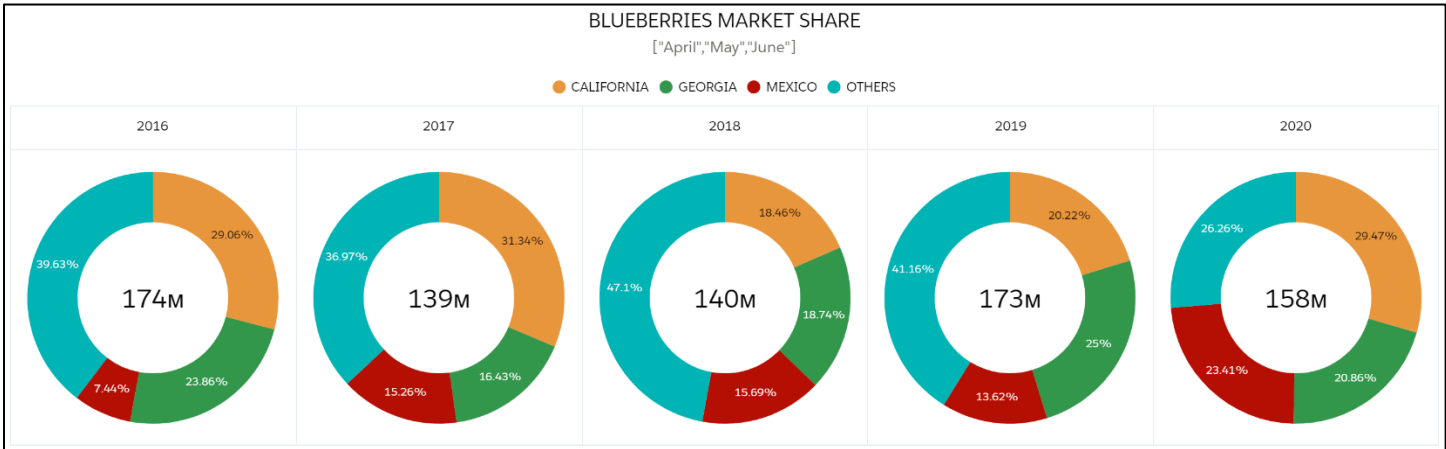


Figure 8: The market share of Georgia blueberry producers during their harvest window decreased from 23.86% to 20.86% between 2016 and 2020. Imports from Mexico increased from 7.44% of product in the market to 23.41%. California's market share increased slightly from 29.06% to 29.47%, during the same three months.

Michigan

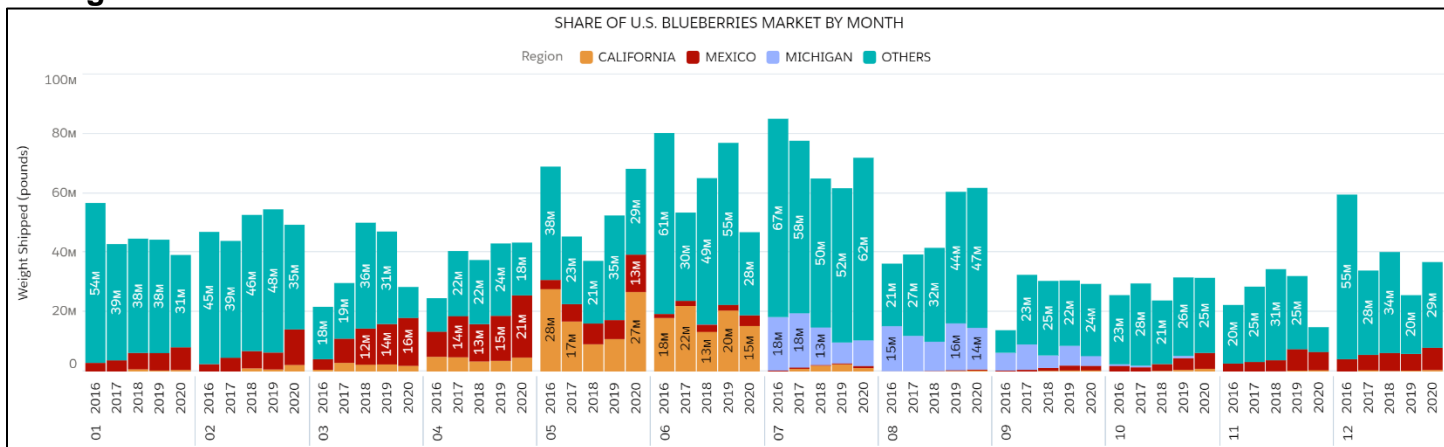


Figure 9: Michigan producers harvest blueberries in significant volume from July through September.

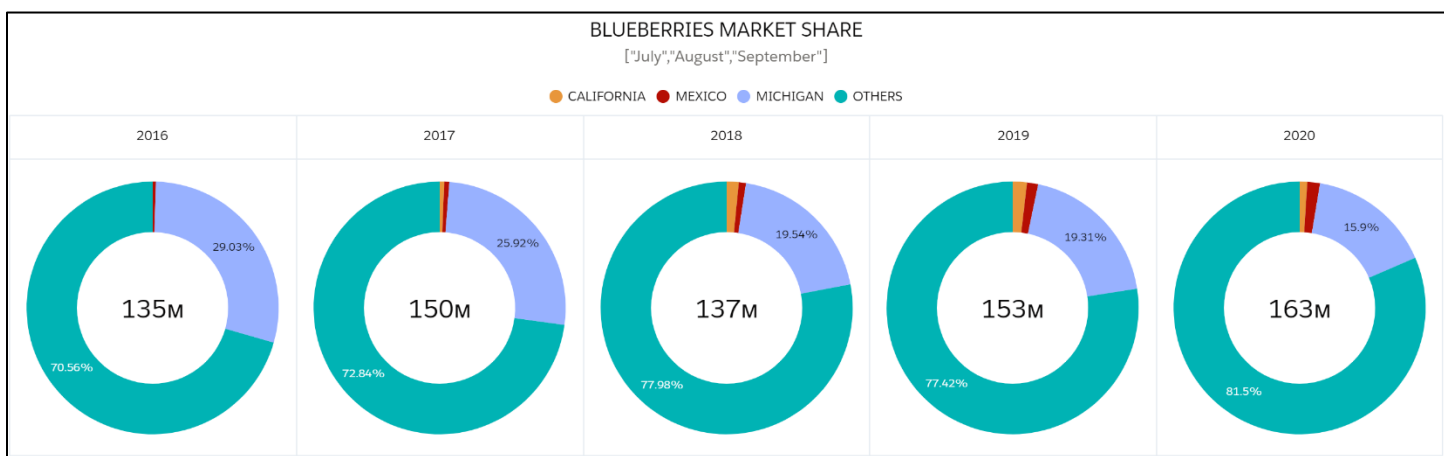


Figure 10: The market share of Michigan blueberry producers during their harvest window decreased from 29.03% to 15.9% between 2016-2020. Imports from Mexico increased from 0.41% of product in the market to 1.62%.

New Jersey

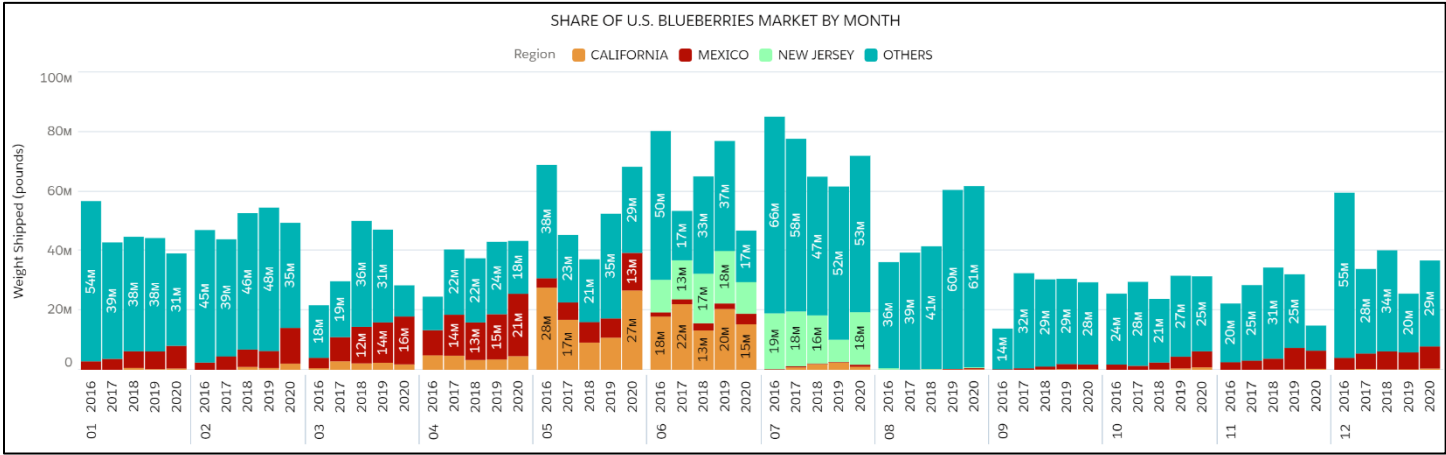


Figure 9: New Jersey producers harvest blueberries in significant volume in June and July.

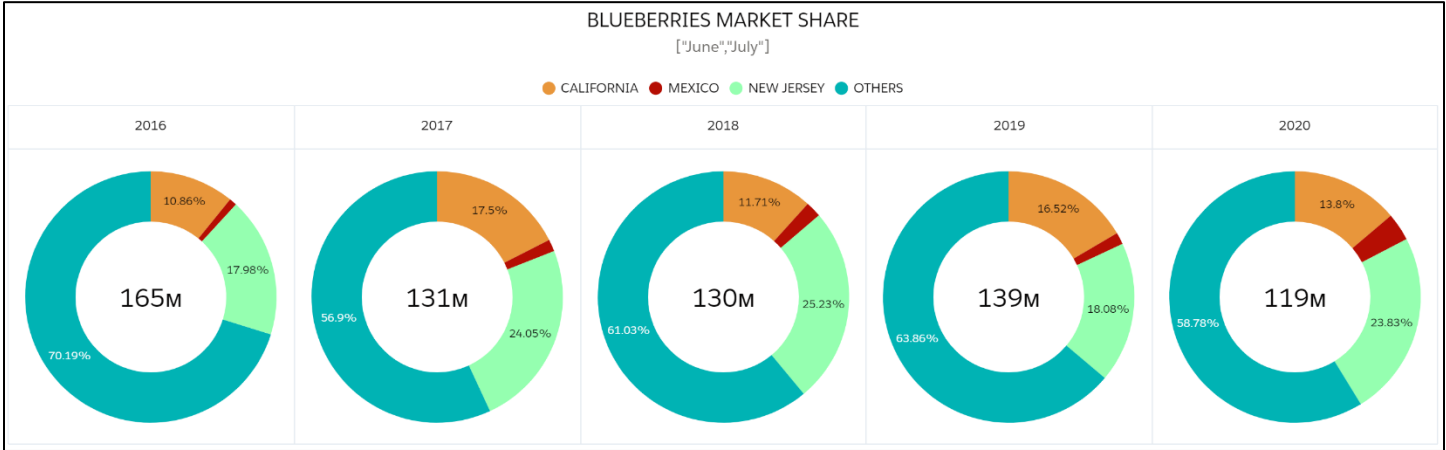


Figure 10: The market share of New Jersey blueberry producers during their harvest window has increased from 17.98% to 23.83% between 2016 and 2020. Imports from Mexico increased from 0.98% of product in the market to 3.58%.