

# Trade 101: A Four-Part Educational Series

---

## PART 4: Blueberry Trade

North American Blueberry Council – December 9, 2025



Agriculture Trade  
Education Council



# INTRODUCTIONS

---

**Brian Kuehl**

**ATEC Executive Director  
Principal, Pinion, LLC**

**[brian.kuehl@pinionglobal.com](mailto:brian.kuehl@pinionglobal.com)**

**[www.AgTradeEducation.org](http://www.AgTradeEducation.org)**

**[www.PinionGlobal.com](http://www.PinionGlobal.com)**

---

# Course Structure

## Trade 101: A Four-Part Educational Series

**PART 1: Why Trade Matters and Trade Policy (1773-2015)**

Sept. 29, 2025

**PART 2: Recent Trade Developments (2016-2024)**

Oct. 14, 2025

**PART 3: 2025 Trade Policy and Breaking Developments**

Nov. 13, 2025

**PART 4: Blueberry Trade**

Dec. 9, 2025

---

# Today's Agenda

## Part 4: Blueberry Trade

9:00 am – 10:00 am Pacific

**Review Agenda, Course Structure, Learning Objectives**

9:00 – 9:05 a.m.

**Part 4A: Blueberry Production and Trade Trends**

9:05 – 9:15 a.m.

**Part 4B: Trade Agreements & Policy**

9:15 – 9:25 a.m.

**Part 4C: Market Competition & Challenges**

9:25 – 9:40 a.m.

**Part 4D: Trump Trade 2.0**

9:40 – 9:50 a.m.

**Wrap-Up + Q&A**

9:50 – 10:00 a.m.

---

# Learning Objectives

1. Understand basic trade history, structures, and vocabulary
2. Understand recent trade issues and issues that may occur in the coming years
3. Provide participants with the tools to explain trade issues to colleagues

# Key Terms – Trade Lingo Bingo

- Anti-Dumping/Countervailing Duties (AD/CVD)
- Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)
- Free Trade Agreement (FTA)
- General Agreement on Tariffs and Trade (GATT)
- Indo-Pacific Economic Framework (IPEF)
- International Emergency Economic Powers Act (IEEPA)
- International Trade Commission (ITC)
- Multi-Lateral Free Trade Agreement
- North American Free Trade Agreement (NAFTA)
- Permanent Normal Trade Relations (PNTR)
- Sanitary/Phyto-Sanitary (SPS)
- Section 232 of the Trade Act of 1974
- Section 301 of the Trade Act of 1974
- Trans-Pacific Partnership (TPP)
- U.S. Mexico Canada Agreement (USMCA)
- U.S. Trade Representative (USTR)
- World Trade Organization (WTO)

**PART 4A:  
BLUEBERRY PRODUCTION AND  
TRADE TRENDS**

---

# Blueberry Production: History

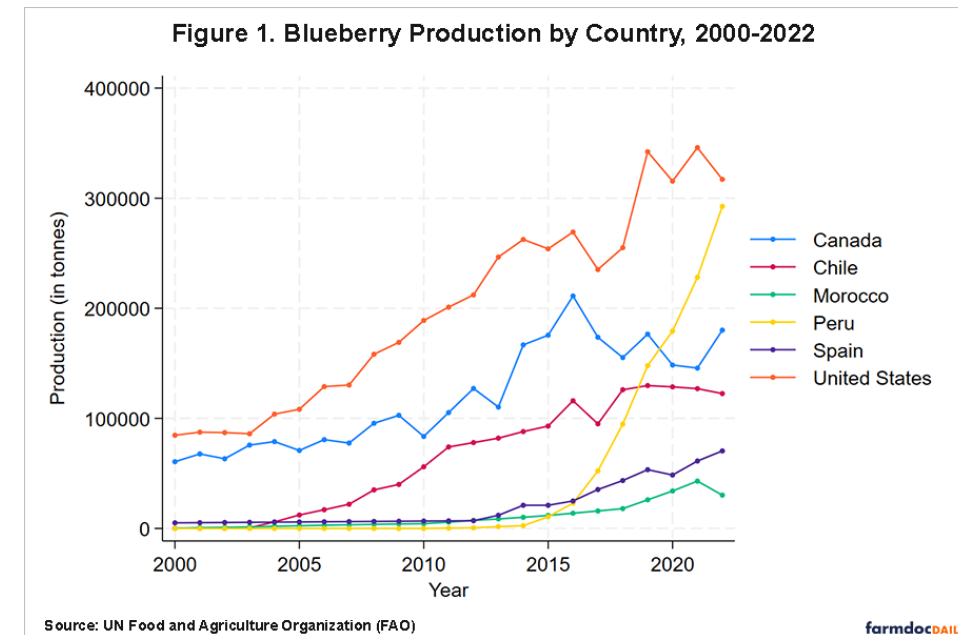
- The development of cultivated blueberries began in the early 1900s, and the first blueberries were marketed in 1916.
- Until the early 1970s, blueberries were commercially grown mostly in three states: New Jersey, Michigan, and North Carolina.
- In subsequent years, the industry worked to expand production into other states.
- Blueberries became globalized and commercialized after 1970, with rapid expansion beginning in the 1990s.



*Introducing the County Agents to a New Crop—Dr. F. V. Coville and Miss Elizabeth White Explain How They Have Produced the “Super-Blueberry”*

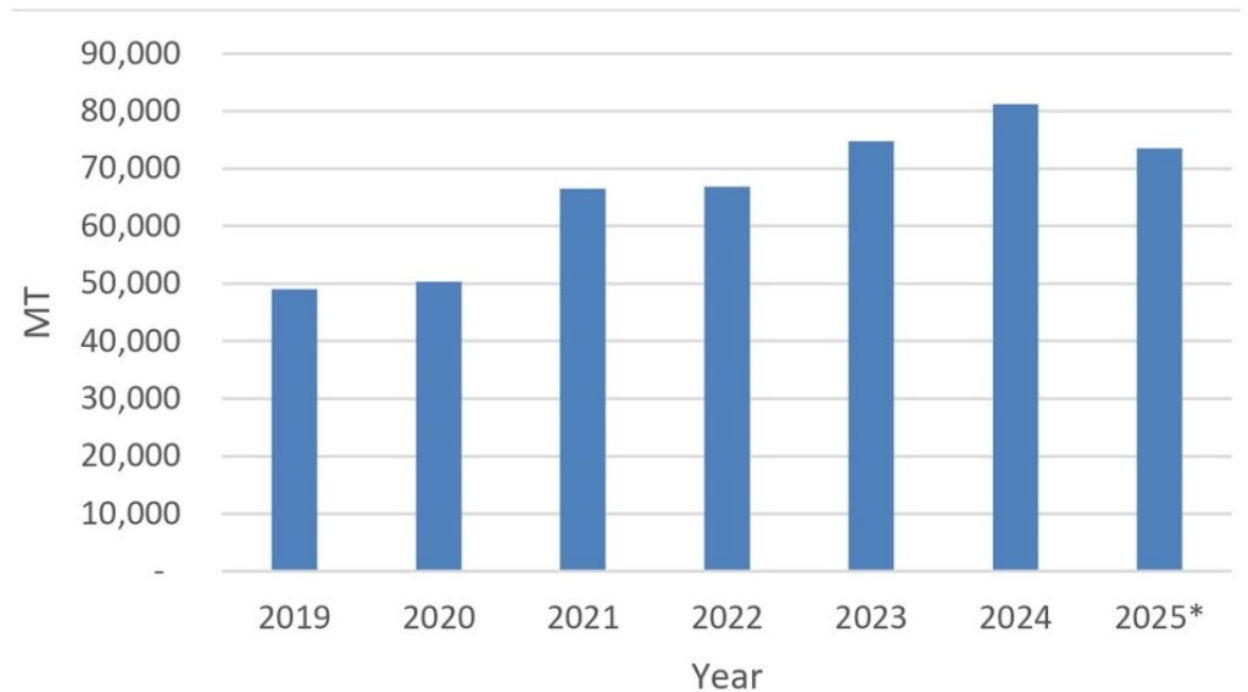
# Blueberry Production: History

- Americans are eating more blueberries, and they have evolved from a seasonal fruit to a year-round staple.
- According to the USDA, in 2022 there were 17,718 farms producing blueberries on 191,976 acres in the United States.
- Outside the United States and Canada, Chile and Peru have emerged as the leaders in cultivated blueberry production.
- The rise of Chile's commercial trade began in the 1990s and continued to expand rapidly in the early twenty-first century.
- Peru's first commercial plantings took place in the 2000s, followed by rapid expansion a decade later.



# Blueberry Production: History

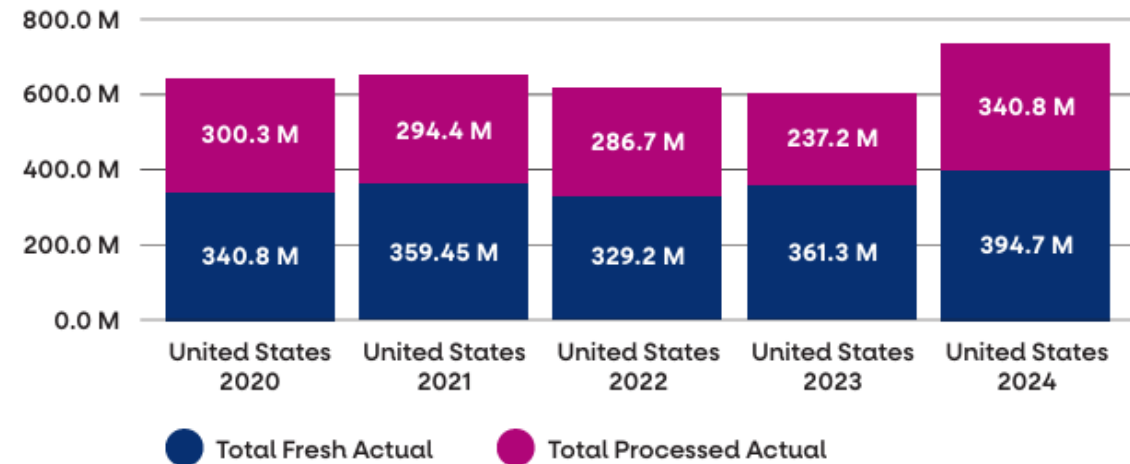
- Mexico is now the 6<sup>th</sup> largest producer of blueberries with 73,500 metric tons projected for 2025.
- The U.S. is Mexico's largest export destination – in 2020, Mexico exported 51,168 metric tons of blueberries to the United States - 95.9% of total production.



# Blueberry Production Trends

- U.S. blueberry production reached a record high in 2024.
- U.S. fresh blueberry exports increased 36% year-over-year to 104 million pounds in 2024- valued at \$163 million.

United States Production Volumes (lbs) 2020-2024

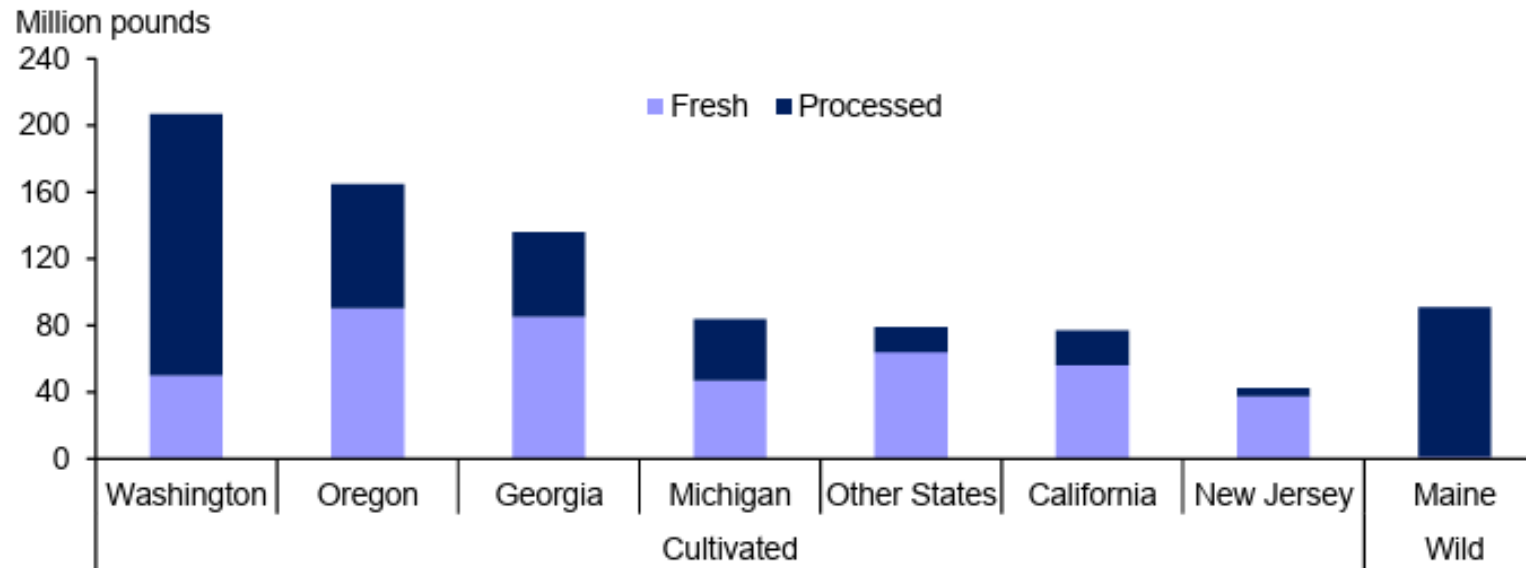


Source: NABC Crop Report

# Blueberry Production Trends

- The top three blueberry producing states are now Washington, Oregon, and Georgia, accounting for almost two-thirds of cultivated blueberry production.

**Most cultivated blueberries were destined for fresh market in 2024 while almost all wild blueberries were destined for the processed market**



Note: Other States include Florida and North Carolina.

Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service.

# Blueberry Production

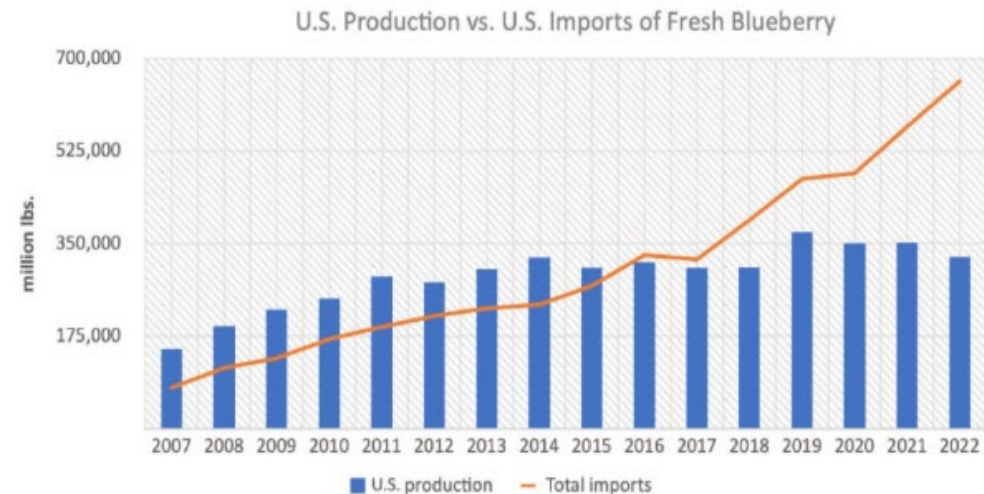
---

- The Florida crop typically arrives in the market in March and ends in May.
- Georgia enters the market in mid-to-late April, other major states follow through summer.
- Most harvests end in September, those in California, Washington, Michigan, and Oregon can ship into October with the use of controlled atmosphere environment storage.



# Blueberry Production Trends: Production and Import Expansion

- **Market transformation since early 2000s:** Blueberries now available year-round in high volumes.
- **Production advances:** New technologies and varieties extended growing seasons.
- **Imports surge:** Foreign supply ensures year-round availability, making blueberries a household staple.
- **U.S. growth:** Domestic production rose gradually, hitting record highs in 2024.
- **Imports:** Since 2016, fresh imports have exceeded U.S. output, increasing competition.



Source: U.S. Department of Agriculture

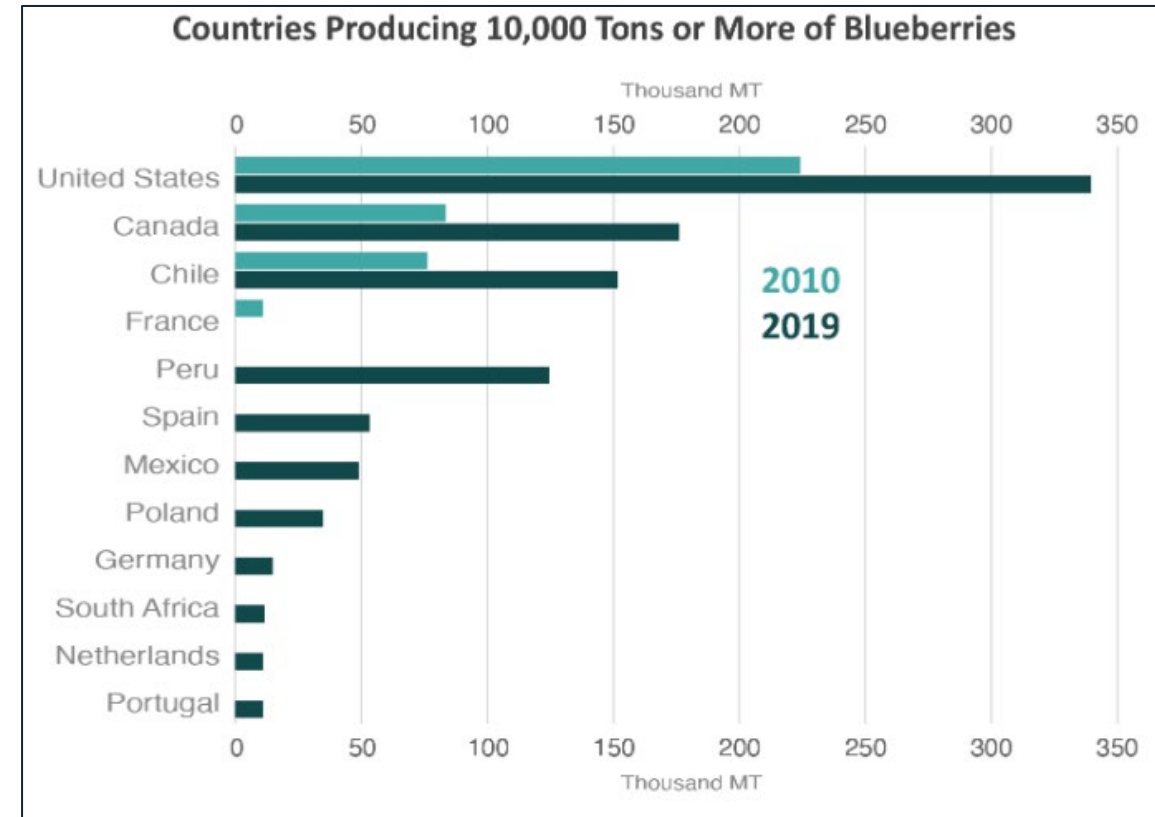
# Blueberry Production Trends: 2024

---

- Total U.S. blueberry production climbed to \$735.5 million pounds – up 23% from 2023.
- For the first time, blueberry exports surpassed 100 million pounds, reaching 104 million pounds – a 36% jump from 2023.
- 684 million pounds of fresh blueberry imports in 2024 – up 22% year-over-year and surpassing the previous high in 2022.
  - Nearly all cultivated varieties and 15% organic.
  - Peru, Mexico, and Chile accounted for nearly 90% of total import volume.

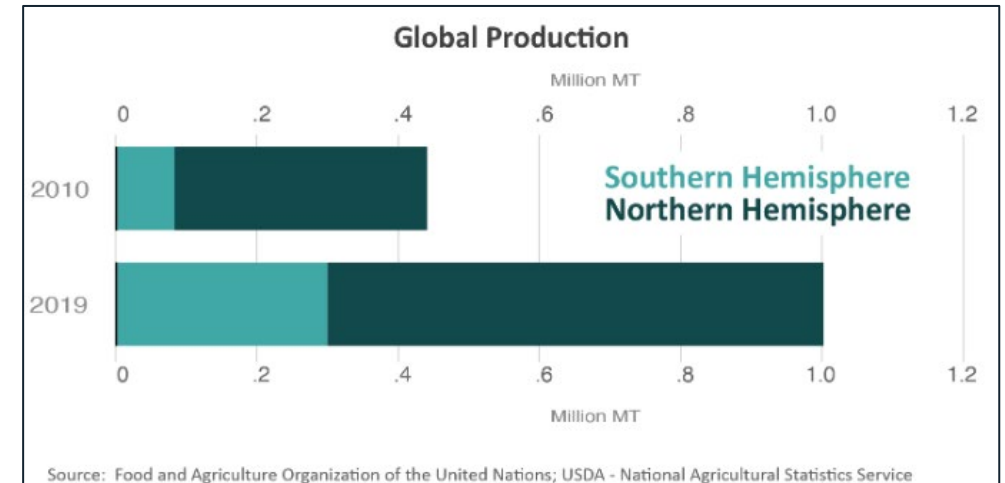
# Blueberry Production Trends: Production Expansion

- Global production more than doubled between 2010 and 2019.
- In 2010, only 4 countries produced more than 10,000 tons: the United States, Canada, Chile, and France.
- By 2019, at least 11 countries were above the 10,000-ton threshold.



# Blueberry Production and Trade Trends

- The United States, while exporting some fresh blueberries, has become a net importer.
- Imports of highbush blueberries surged more than 900% from 2000 to 2020, driven largely by Southern Hemisphere production.
- Blueberries rank as the fourth most valuable fresh fruit import after avocados, bananas, and grapes—accounting for nearly \$2.4 billion in annual U.S. economic impact.



Country	Annual Economic Impact
Peru	\$1.3B
Mexico	\$455M
Chile	\$357.2M
Canada	\$348.9M

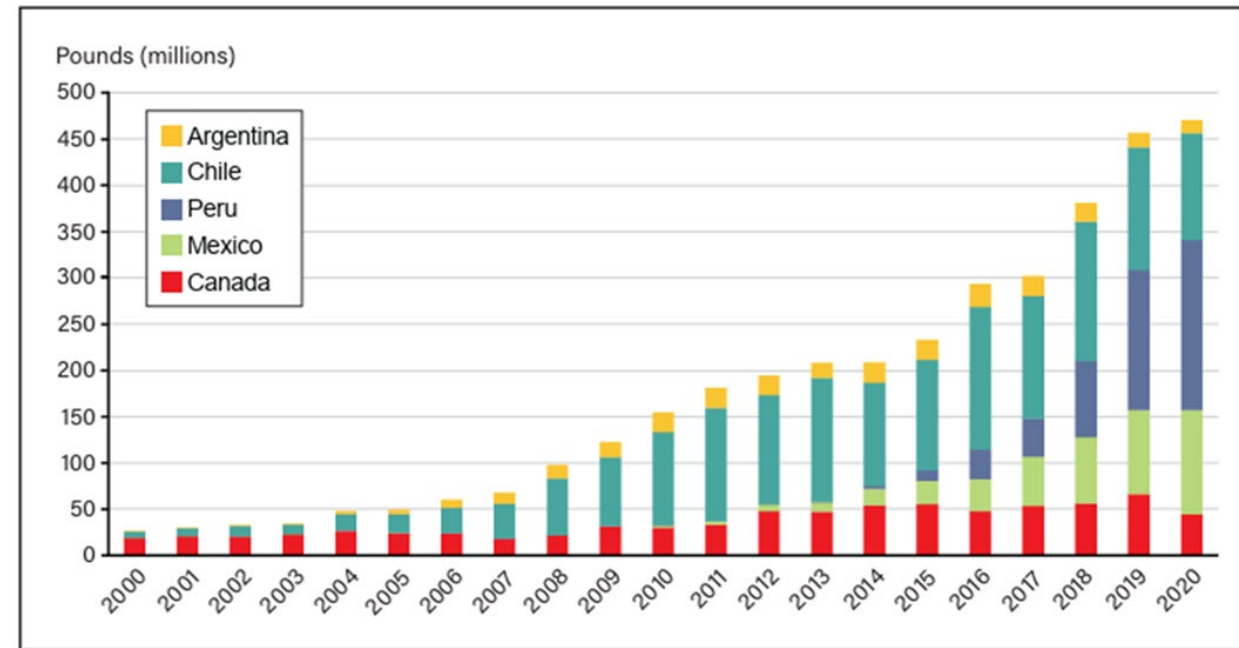
**PART 4B:**  
**TRADE AGREEMENTS & POLICY**

---

# Blueberry Trade- Trade Agreements & Policy

- Until recently, Canada and Chile were the largest source of imports of blueberries.
- Mexico first exported blueberries in 1996.
- Peru, which started exporting fresh blueberries to the United States in 2010, has had the most dramatic expansion.
- Peru overtook Chile in 2021 as the world's largest exporter of blueberries.
- Between 2010 and 2020, domestic fresh blueberry imports from Peru and Mexico grew from less than 1 percent to over 50%.

U.S. fresh blueberry imports by top five countries, 2000 to 2020

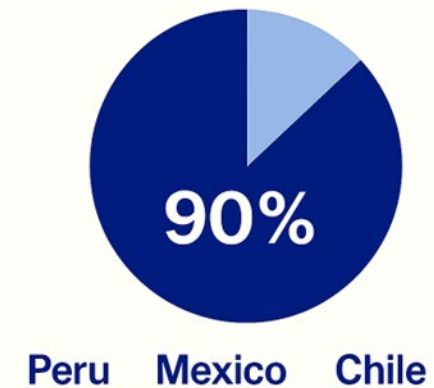


Source: USDA, Economic Research Service calculations using U.S. Department of Commerce, Bureau of the Census data.

# Blueberry Trade- Trade Agreements & Policy

- Now Peru, Mexico, and Chile account for nearly 90% of U.S. blueberry imports.
- Canada remains the primary export destination, taking roughly 94% of U.S. shipments.
- Free trade agreements—including NAFTA, USMCA, and bilateral deals with Peru and Chile—eliminated tariffs on blueberries, fueling import and export growth.

Peru, Mexico, and Chile account for nearly 90% of U.S. blueberry imports.



# Blueberry Trade: NAFTA

- In 1993, Mexico, Canada, and the United States signed a trilateral agreement creating a free trade area in North America.
- The North American Free Trade Agreement (NAFTA) came into force on January 1, 1994.
- On January 1, 2008, virtually all tariffs were eliminated on goods traded between Mexico, Canada, and the U.S., including fresh, frozen, and dried blueberries.



# Blueberry Trade: USMCA

- The United States–Mexico–Canada Agreement (USMCA) has been in force since July 1, 2020.
- USMCA is a comprehensive economic and trade agreement that modified NAFTA.
- All agricultural products, including blueberries, that had zero tariffs under NAFTA continue to have zero tariffs under USMCA.



The leaders of the United States, Mexico, and Canada sign the USMCA.

# Blueberry Trade: USMCA

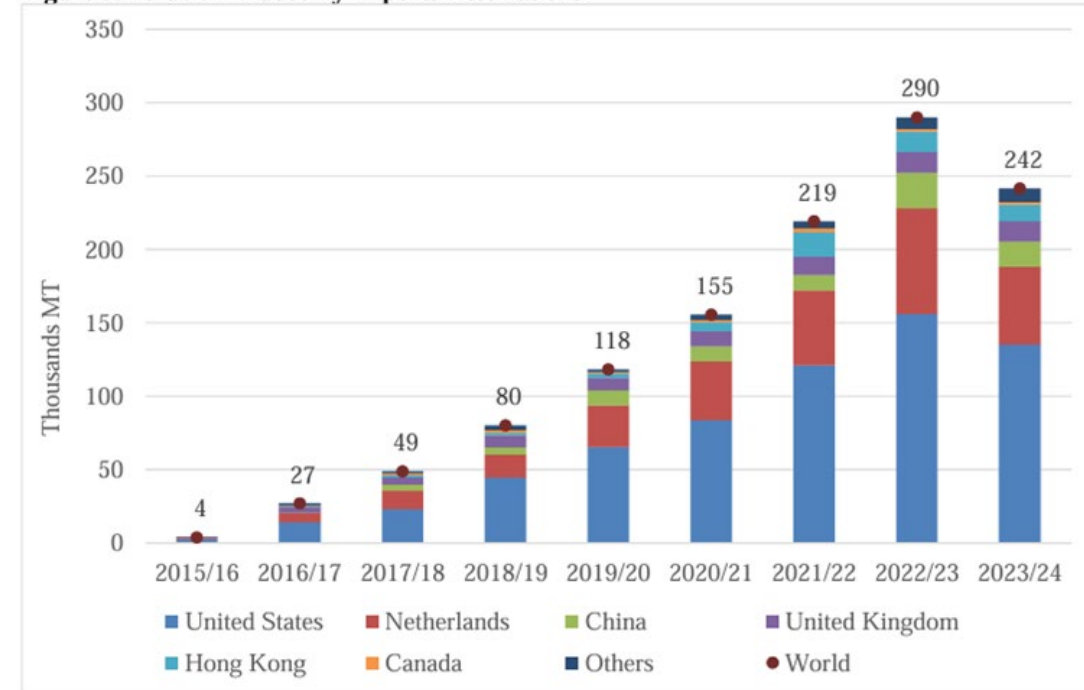
- As part of the USMCA negotiation, the United States attempted to resolve ongoing trade imbalances with Mexico for seasonal and perishable fruits and vegetables.
- Views regarding seasonal produce protections in USMCA were mixed with some asking for seasonal quotas.
- Others opposed such changes, contending that seasonal imports complement rather than compete with U.S. growing seasons and asserted that efforts to push for seasonal protections could have derailed the USMCA negotiation altogether.
- As ratified, USMCA did not include changes to U.S. trade remedy laws to address seasonal produce trade.



# Blueberry Trade- United States- Peru Free Trade Agreement

- The Peru-U.S. Free Trade Agreement entered into force on February 1, 2009.
- PTPA allows Peru to export blueberries to the United States tariff free.
- Peru has since become the top supplier of blueberries to the U.S and has built an industry that has boomed in the last 10 years from \$26 million to \$2 billion dollar in 2023/24.

Figure 7. Peruvian Blueberry Exports Destinations



Source: Peruvian Customs

# Blueberry Trade: Chile Free Trade Agreement

- The Chile Free Trade Agreement (CLFTA) went into effect on January 1, 2004.
- As of January 1, 2015, all qualifying products are duty free.
- In 2024, Chile's Agriculture and Livestock Service approved blueberry exports from all U.S. states (except Hawaii).
- Prior to 2024, only fresh blueberries from Oregon, Washington, and California were approved for entry into Chile.



# Blueberry Trade: China

- In 2012, China opened its market to imported blueberries from several countries, including Chile, Mexico, Uruguay, Canada, and Peru.
- After years of effort, the first commercial shipment of fresh U.S. blueberries arrived in China in 2021.
- These blueberries mainly come from Washington State and Oregon.
- The U.S. government and the U.S. Highbush Blueberry Council worked together with China's customs authorities to develop export phytosanitary protocols for fresh blueberries, a process which took years.

Table 3. China: Blueberry Export to China by Partner (tons)

Partner	2018	2019	2020	2021	2022
World	15,372	22,045	25,160	29,597	42,847
Peru	5,657	11,919	14,536	23,275	35,890
Chile	9,657	10,049	10,622	6,320	6,956
Mexico	1	1	0	0	0
Argentina	2	6	0	0	0
Canada	55	70	0	0	0
Uruguay	0	1	0	0	0
United States	0	0	0	2	0

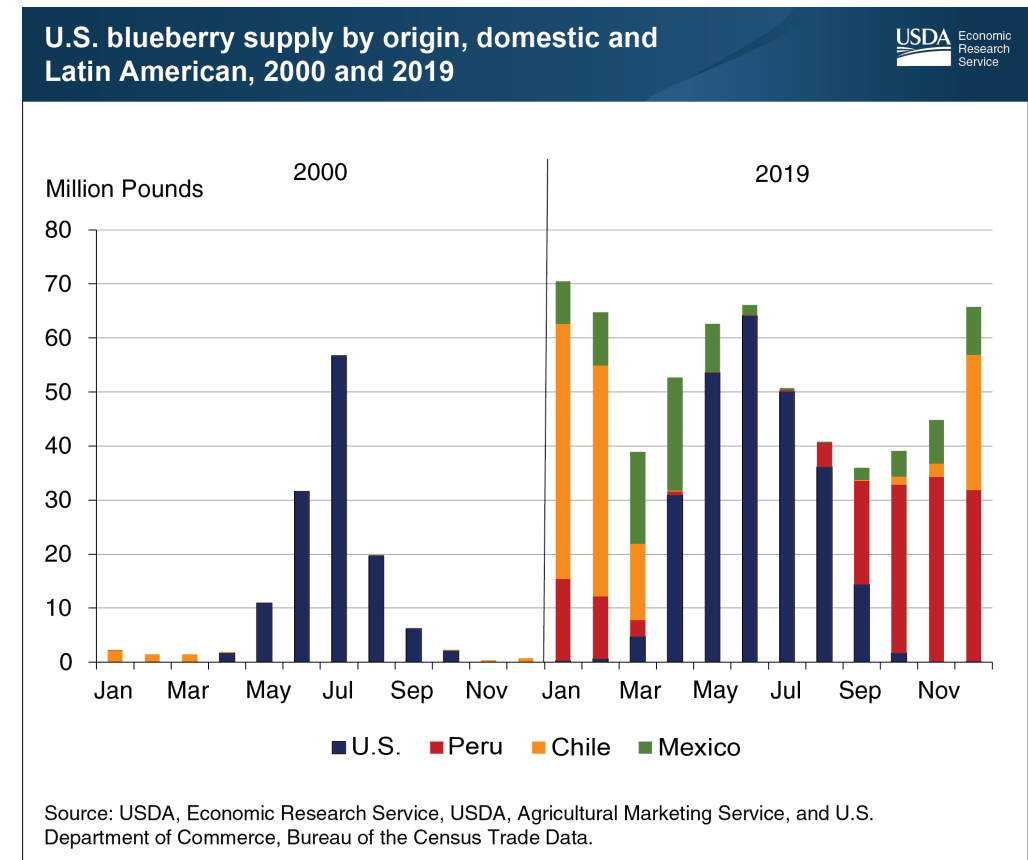
Source: Trade Data Monitor

**PART 4C:  
MARKET COMPETITION &  
CHALLENGES**

---

# Blueberry Trade: Market Competition & Challenges

- Before 2010, U.S. and foreign seasons rarely overlapped, and off-season gaps meant higher prices.
- Imports have grown and now not only supply blueberries in the off-season months of domestic production, but increasingly during the in-season months as well.
- Overlapping supply has expanded year-round availability but increased foreign competition.
- Imports now account for about two-thirds of fresh blueberries sold in the U.S.



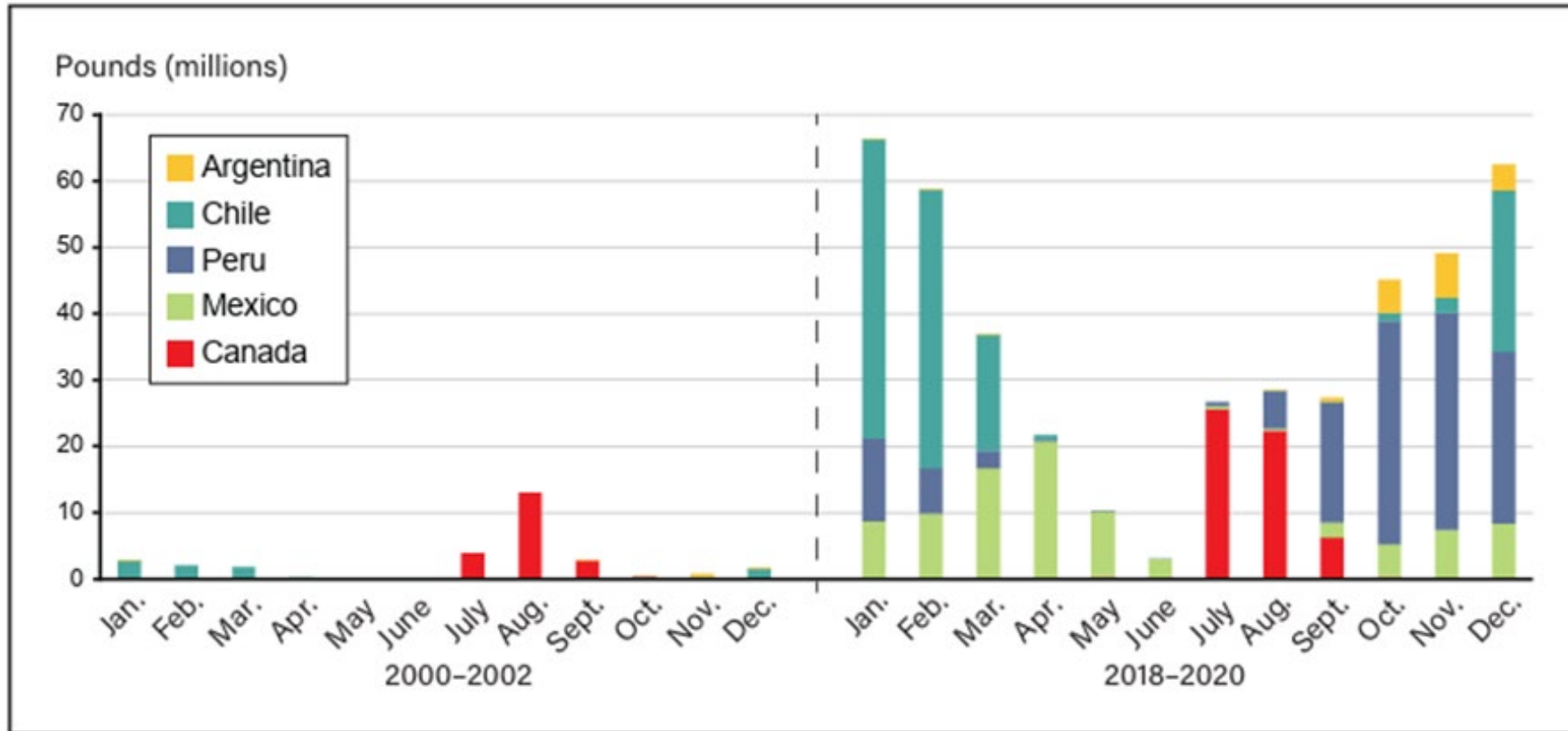
# Blueberry Trade: Competition

- Over 90% of U.S. blueberry shipments occur between April and August, peaking in July.
- Southern Hemisphere suppliers once filled winter gaps, but Mexico now exports during the U.S. season, competing with early states like California, Florida, and Georgia.
- Mexico's long season (September–June) overlaps with these states' market windows, putting significant pressure on Florida and Georgia.
- Once dominant in early-season markets with premium prices, Florida has seen its advantage erode as Mexican imports surged after 2009.
- The United States accounts for 96% of Mexico's blueberry exports.



# Blueberry Trade: Competition

U.S. fresh blueberry monthly imports by top five countries, 2000-2002 and 2018-2020



Source: USDA, Economic Research Service calculations using U.S. Department of Commerce, Bureau of the Census data.

# Blueberry Trade: Competition

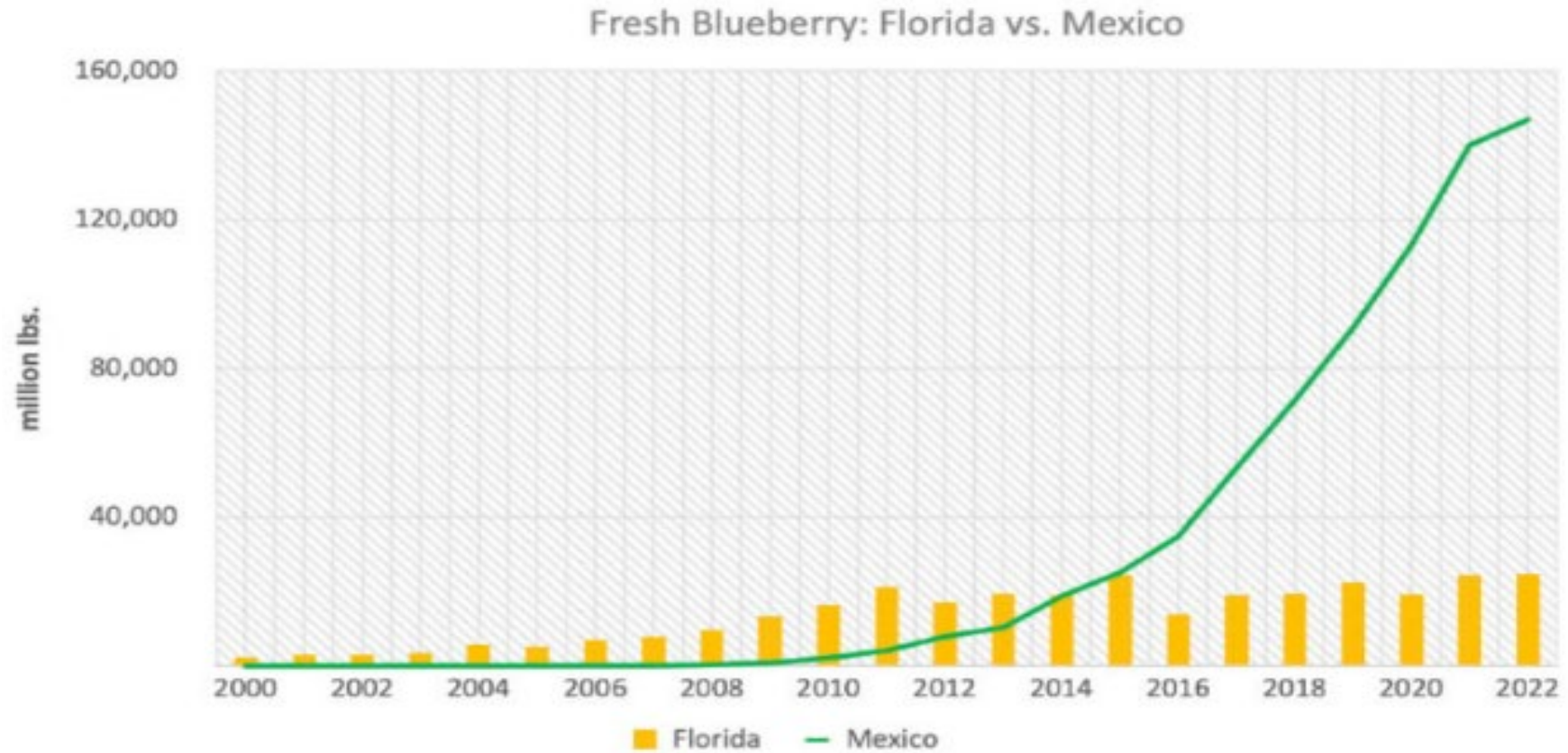
Table I-3: Blueberry general seasonal availability for select major producers

Source	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
United States												
CA												
NC, SC												
FL, GA												
East Coast												
ME												
Midwest												
OR												
WA												
Import suppliers												
Argentina												
Canada												
Chile												
Mexico												
Peru												

Note: This figure captures the primary blueberry season and may not include months with low levels of production.

Source: U.S. International Trade Commission

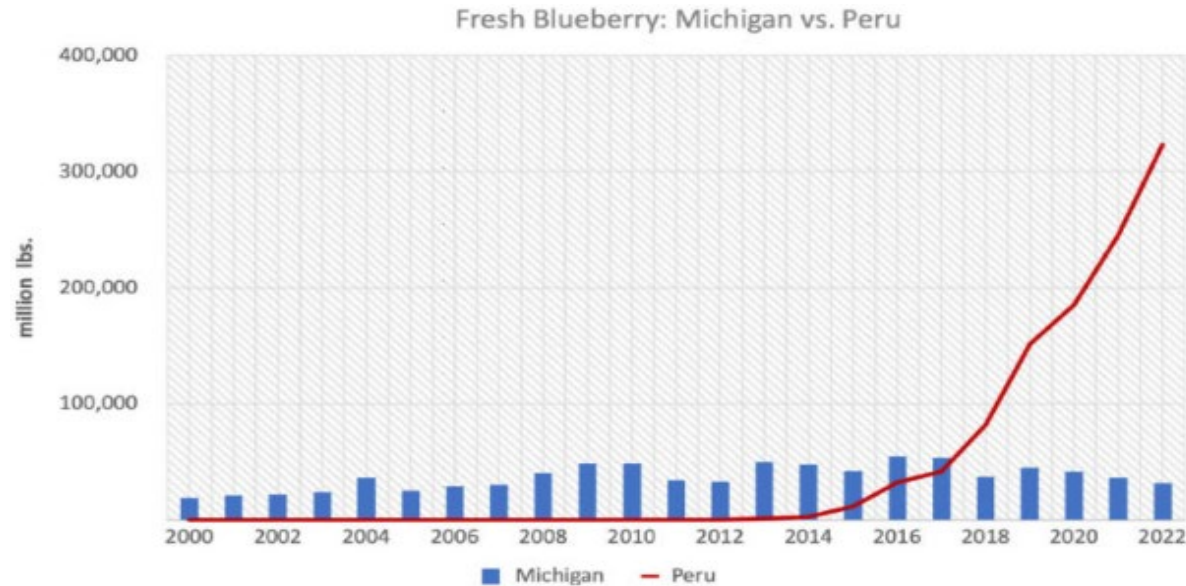
# Blueberry Trade: Competition



Source: U.S. Department of Agriculture

# Blueberry Trade: Competition

- The peak of Michigan, Washington and Oregon production season during late summer months, with shipments continuing into October, overlaps with the market window of Peruvian blueberries (mid-August to mid-February), resulting in competition for these states.



Source: U.S. Department of Agriculture

# Blueberry Trade: Section 201 Finding

- In 2020, USTR, USDA, and Department of Commerce investigated rising imports of seasonal produce.
- USTR asked the U.S. International Trade Commission to launch a Section 201 probe on whether increased fresh, chilled, or frozen blueberry imports harmed U.S. growers.
- Section 201 permits temporary safeguards like tariffs or quotas to help industries adjust to import competition.



# Blueberry Trade: Section 201 Finding

- During two hearings, southeastern blueberry growers—particularly in Florida and Georgia—voiced concerns about unfair competition from Mexican imports.
- House members from those states urged the ITC to impose relief.
- Canadian and Mexican governments said the USMCA restricted U.S. ability to impose restrictions on their berries.
- Officials from South American nations told the ITC they were surprised to be included in the investigation, due to the different growing seasons for their crops.



# Blueberry Trade: Section 201 Finding

- In 2021, the U.S. International Trade Commission unanimously concluded that blueberry imports were not a substantial cause of serious injury to the domestic industry.
- The Commission found that despite recent lower profits, the industry stayed profitable and grew in acreage, production, jobs, and shipments.
- The ITC's decision ended the investigation without the potential for appeal.
- Blueberry producers could request another investigation in the future but import conditions would likely have to change for a different outcome.



# **PART 4D: TRUMP TRADE 2.0**

---

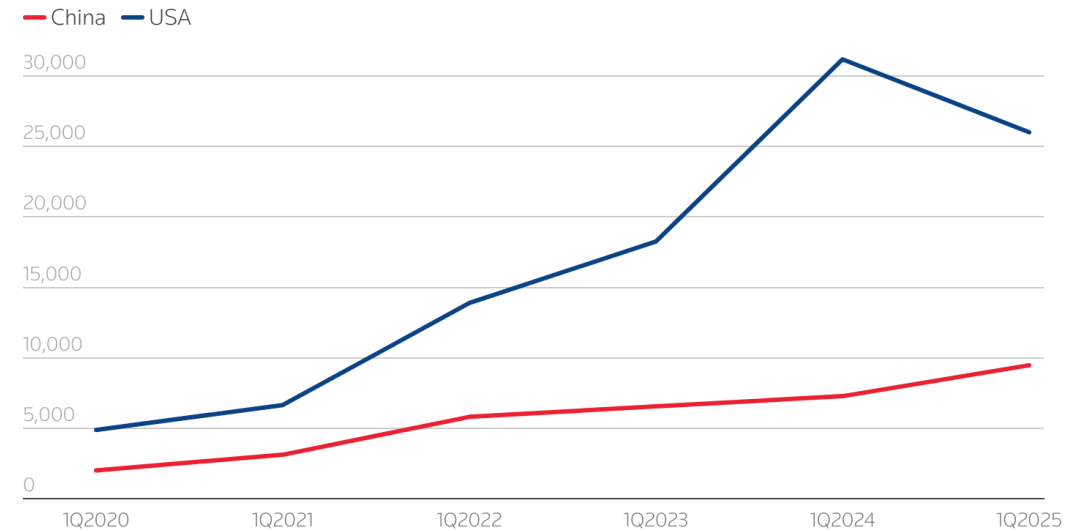


# Blueberry Trade- Trump Trade 2.0

- As blueberry production in Peru rises, growers are looking beyond the U.S., their top customer, amid ongoing trade disputes.
- China has insatiable demand and has built a huge new port near Lima that cuts shipping time across the Pacific in half.
- If supplies from Peru decrease, U.S. consumers will likely see product shortages and rising prices.

## Peruvian blueberry exports: U.S. vs China

Peru's blueberry exports to the United States are starting to come under pressure as growers look to diversify to new markets like China amid import tariff uncertainty.



Note: Data is metric tons of fruit. No specific commodity code for blueberries in China, only the family of berries blueberries belong to, which includes fruits like cranberries

By Lucinda Elliott • Source: Peru government, Chinese customs

# Impact on Agriculture

- The whipsaw nature of trade policy severely threatens ongoing trade disruptions, increasing the perception of the U.S. as an unreliable partner and risking the loss of markets developed over decades.
- Competing countries are forging trade agreements that exclude the U.S.
- The USMCA is up for review next year and the seasonality issue is again dividing producers and associations.



Donald Trump is shown at a podium with the Seal of the President of the United States, holding a sign titled "Reciprocal Tariffs". The sign displays a table of tariff rates for various countries, with a column for "Tariffs changed by the U.S." and a column for "Current Tariffs".

Country	Tariffs changed by the U.S.	Current Tariffs
China	67%	
European Union	39%	
Vietnam	80%	
Lebanon	84%	
Japan	86%	
India	52%	2
South Korea	50%	21
Thailand	72%	36
Netherlands	81%	31
Indonesia	68%	32
Malaysia	47%	24
Cambodia	97%	49%
	10%	10%
	40%	30%
	10%	10%
	74%	37%
	10%	10%
	33%	17%
	34%	17%
	10%	10%
	10%	10%
	58%	29%
	10%	10%
	68%	34%
	10%	10%

# **BLUEBERRY TRADE: WRAP UP AND Q&A**

---

# THANK YOU!

---



**Agriculture Trade  
Education Council**