New terminology better fits today’s blueberry realities
Blueberry industry in figures
Chile keeps working on positioning high quality blueberries
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New terminology better fits today’s blueberry realities

Chile keeps working on positioning high quality blueberries

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New terminology better fits today’s blueberry realities

For Fall Creek Farm & Nursery, Inc., the traditional category names given to blueberries simply don’t fit the reality of the industry anymore. That’s why the Fall Creek global technical team is migrating to a new language that reflects not only the climates and regions where blueberries are grown, but also how they are produced.

Traditionally, blueberries have been categorized using the terminology Lowbush (or ‘Wild’), Southern Highbush or Northern Highbush. But with advancements in breeding and horticultural technologies, many new varieties today cover a broad adaptation range, extending beyond established norms.

Fall Creek Farm & Nursery, a global leader in the collection and production of blueberry varieties, has witnessed remarkable growth and changes in the industry, with fruit now grown in places not even contemplated 30 years ago.

These traditional category names simply don’t fit the reality of the industry anymore. That’s why Fall Creek’s global technical team is migrating to new a language that reflects not just climate and weather, but how the fruit is grown.

“It is our belief that thinking about blueberries in this way can broaden one’s perspective and help us better understand where blueberry production is going. We have begun to classify blueberry varieties into four new categories that are still loosely based on the concept of ‘chill requirements,’ although we understand that chill alone is not the only criterion that defines where and how they are grown”, Fall Creek said in a press release.

“However, chill does serve as an improved way to broadly and generally describe types of varieties to more accurately reflect their regional adapt-ability”, the company said.

When referencing categories of blueberries at Fall Creek, the nursery is beginning to use the following terminology:

- HIGH CHILL HIGHBUSH
- MID CHILL HIGHBUSH
- NO CHILL HIGHBUSH
- LOW CHILL HIGHBUSH

For Fall Creek this new terminology makes sense when you consider these four new categories based on the following criteria to classify varieties:

**HIGH CHILL HIGHBUSH**

Historically, Northern Highbush varieties are grown in areas at latitude 45 and higher, with true seasons and cold winters. These growing regions include those such as New Jersey, the Pacific Northwest, Michigan, Northern and Eastern Europe and the far southern regions of Chile and New Zealand.

Plants grown in High Chill regions are fully deciduous and go into a true winter dormancy. They have a condensed spring bloom period and a more concentrated harvest period. Growing challenges that have to be managed in this category include issues like winter-related injury and potentially damaging cold springs.

Classic blueberry varieties that fall into this High Chill Highbush category are Duke, Blue Crop and Aurora.

Photos: Fall Creek.
**MID CHILL HIGHBUSH**

Many mid chill regions, generally found in latitudes between 35-45, also have a long history of blueberry culture and are characterized by longer growing seasons, more temperate winters and substantially hotter summers. Regions include places like the central valley of Chile, North Carolina, the Sacramento Delta of California (USA), the south of France, the Asturias region of Spain and similar growing areas.

Mid Chill Highbush blueberries tend to be interspecific hybrids created from traditional Northern Highbush and traditional Southern Highbush crosses. These varieties tend to outperform other varieties in vigor in the aforementioned regions and often exhibit characteristics of both parent plants.

Examples include varieties such as Legacy, Ozark Blue, Oneal and others. Rabbiteyes typically fare well in these regions as well.

Typically, challenging growing issues for these mid chill areas can range from spring frosts and occasional winter cold intrusions to disease pressures. The longer growing seasons can mean that plants are more vigorous. For example, Legacy can be extremely vigorous and plants can get leggy, which requires additional pruning.

In mid chill regions, winter dormancy is important. Some Mid Chill Highbush cultivars are deciduous and some are semi-deciduous. Fields are managed similarly to High Chill varieties. Fertilization systems reflect that of High Chill varieties to encourage spring and summer growth and winter rest.

**NO CHILL HIGHBUSH**

No Chill Highbush is the newest variety category and reflects the significant advancements of genetics and horticultural management in the last decade in regions that have no actual winter or “chill.”

No Chill Highbush varieties must be managed as evergreen - independent of the season – with plants never going dormant or undergoing a resting period.

These latitudes range from the high 20s and lower. No Chill blueberries remain active and grow year-round. Examples of emerging regions for No Chill Highbush blueberry growing include central Mexico, Peru, Indonesia and South East Asia.

According to Fall Creek varieties currently grown in No Chill conditions are Low Chill varieties that have shown the greatest adaptability to these unique climates and management systems. To date there are no released varieties that have been developed exclusively in and for no chill regions.

More than any of the others, this No Chill Highbush category is open to cultural manipulation to achieve optimum harvest windows. Management systems, inputs and manipulation techniques are particularly critical to successful No Chill Highbush blueberry cultivation. These systems are under active development.

Limiting factors for varieties in no chill regions include climate adaptability and disease, insect pressures and the complexities of achieving consistent fruit quality.

The greatest challenge for growers at this early stage of the No Chill Highbush blueberry industry in these regions is the general lack of knowledge and experience.
Low Chill Highbush varieties have typically been referred to as Southern Highbush and perform best in latitudes ranging from approximately 28-35. Regions include central and northern Florida, southern Georgia and California’s San Joaquin valley (all USA), southwestern Spain, Chile’s IV, V, VI and Metropolitan regions, and northern Argentina (such Concordia and Tucuman).

These Low Chill Highbush regions are characterized by long growing seasons with mild winters. Most of the varieties for these regions are grown both as deciduous shrubs, which require a resting period, and also as an evergreen which still requires some chill for a resting period to maintain vigor.

Fields are still managed for a resting period. Fertilizer programs generally reflect a management system with summer growing and a winter rest period. Some low chill regions such as the San Joaquin Valley of California (U.S.) have sufficient chill to achieve a resting period naturally while other regions such as central and north Florida (U.S.) use forced dormancy systems to achieve a rest period.

In Low Chill areas, it is common to have conversations with growers about the “number of chill hours” and “accumulated annual chill hours.” This ‘chill tracking’ is a key tenet of what we are referring to as Low Chill Highbush, and also differentiates these Highbush systems from “No Chill” in the following section.

Star, Emerald, Jewel, Ventura and Camellia are all varieties that we refer to as Low Chill Highbush and are commonly grown in these regions. Limiting factors with these varieties are winter or spring freezes, cold snaps, sufficient “chill accumulation” and disease susceptibility.

Low Chill growing has really begun in the last 25 years, but is starting to mature with the arrival of Low Chill genetics.

“It is our opinion that thinking of varieties in terms of High Chill Highbush, Mid Chill Highbush, Low Chill Highbush and No Chill Highbush is a far more accurate way to classify blueberry varieties and provides better insight into the adaptability of varieties”, Fall Creek said.

Blueberries can now be grown, literally, all over the world. To Fall Creek, the industry must maintain its focus on two fundamental goals: 1) To remain steadfast in the collective commitment to produce with consistently high quality berries that consumers will enjoy, and 2) To develop varieties, growing regions and growing technologies to ensure year-round availability.

“Our job as an industry is to leverage the breadth of varieties offered within the categories of High Chill, Mid Chill, Low Chill and No Chill Highbush to maximize the availability of consistent quality blueberries throughout the year”.

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Chile keeps working on positioning high quality blueberries

The country stands out for its conditions in cultivating the fruit. Its current aim is to develop new markets and increase fruit consumption.

Over the years and with development in cultivation, the Chilean industry is used to double-digit growth. For the current season, exports were expected to increase by 15% prior to damages caused by low temperatures.

Chilean Blueberry Committee executive director, Andrés Armstrong, explains this tendency has taken place due to the increasing consumption of the fruit worldwide, not just with fruit from Chile, but also from other growing regions such as the USA, where cultivation area is growing year-on-year.

A few seasons ago, the Chilean industry launched a study to assess Chilean plantations, the age of trees, the different varieties and their locations, in order to make better production estimates.

“We understand that having a better approach to scenarios we might be facing in the future is critical to planning. It’s essential to foresee how production will be during the next five years to take action beforehand,” says Armstrong.

Currently, based on an update carried out this year, about 50% of cultivated land in Chile has not reached its maximum productive capacity. “This only considers the productive capacity of cultivated land, without including eventual area expansions,” says the executive director.

Considering that Chile’s productive capacity will continue to grow and the fact blueberries are taking hold in markets like Peru and Mexico, one could raise the question whether demand will stop growing or the market will become saturated.

“I think we do have the capacity. Conditions for growing blueberries in our country are optimal. What we need is to develop new markets and to increase consumption. And that’s what we’re doing.”

“On the other hand, world consumption – not only during our season – is growing as well, so customers increase every year.”

Armstrong said the world tendency to eat healthily, as well as the healthy connotation of blueberries and all their additional properties, fit well into the trend.

“It’s a fruit in high demand; it’s healthy, and now more available due
to increased production and knowledge. It has adapted to demand, both productively and commercially."

“Blueberries are highly sensitive to sales – there’s not only Asia, but also new markets in Europe, such as exports to Netherlands, which are delivered to many other European countries with a 30% increase in the last few years,” says Armstrong.

“That is one side of its potential, due to new regions consuming the product, but there are also new market segments. A great deal has been said about so called ‘food service’, which has significantly increased fresh blueberries on its menus in the last two or three years,” he stated.

The executive director also explained every market in the world had great interest in Chilean blueberries. During the last season, Asian sales grew by about 50% with an additional 1,500 metric tons (MT) in the market; with China-Hong Kong were the main buyers, followed by Japan.

“Consumption in Asia is growing, and both China and South Korea know about the healthy properties of blueberries. It’s a highly demanded fruit.”

“China’s local production keeps growing; their population has a rising per capita GDP, which has led to their establishment in supermarkets. Marketing and sale conditions of blueberries are becoming increasingly favorable every year.”

“In South Korea, we started from zero to 500MT in one season,” says Armstrong about a market where Chilean blueberry participation only started in 2012.

“Now, in Europe, we always pay attention to England, but we’re also trying to encourage new markets,” says Armstrong. Thus, new promotional activities will begin in Russia, Denmark, Sweden, Norway, Germany, Poland and Turkey.

INDUSTRY CHALLENGES

According to Armstrong, the Chilean industry has to face challenges such as positioning the Chilean blueberry as a high quality product, expanding the consumption frontier and incorporating new consumers.

“So far, we’ve estimated the amounts of fruit that could be produced; and as an industry, not only in Chile, we’ve also been able to incorporate new consumers, new market segments, and maintain blueberries as a healthy product for family consumption. It is an effort that has been developed by the industry, and also has allowed an increase in consumption.”

However, there are also production challenges such as attaining the efficient harvesting of Chile’s rising production. This involves a process of mechanization in harvesting and the development of new technologies that allow the country to produce fresh blueberries as well.

The industrial sector is aware of the different factors that may affect production, coupled with an unstable climate. Thus, quality and fruit conditions are essential to obtain better results.

Consequently, the industry is boosting the so called “6 keys to quality”, so that producers and exporters can tackle the challenges affecting quality.

These keys are: knowing the varieties; anticipating the climate impact; sustainable agro economic management; planning harvesting; cold chain management; and food safety.

“The industry keeps working on the development of new markets without neglecting markets established so far, so that all actors in the process will benefit.”
In 2012, Canada took Chile’s place as the world’s biggest blueberry exporter.

Worldfresh blueberry exports in 2012 were 292,000 metric tons (MT), up 13% on 2011.

The main exporters were Canada, Chile and the U.S. The combined exported volume of these countries was 213,000 MT, about a 73% of world’s total exports.

In 2012, Canada took Chile’s place as the world’s biggest blueberry exporter. In that year, Canada registered its highest exportation growth at more than 58%. In 2013, Canada continued to lead the ranking with more than 105,000MT in exports, 19% higher than 2012.

Exports by Chile – the second-largest blueberry exporter – are expected to end up 22% higher in 2013 than in 2012.

The world’s third-biggest exporter was the U.S. with shipments exceeding 60,000MT, 12% more than in 2012.

As for the fruit’s destinations, iQonsulting general manager Cristóbal González explained the main and nearly only destination for Canadian blueberry was the U.S., receiving 99% of exports.

González explained that the U.S. was the world’s biggest blueberry consumer, with attractive market prices and the proximity between countries allowing the fruit to arrive without any transportation damage.

According to the general manager, 75% of Chile’s exports went to the U.S., “however, a significant proportion of them was re-exported to Canada where there’s a high demand for blueberries.”

Another important market for Chile was Europe with 17% of exports, followed by the Far East which received 6% of the country’s blueberry exports.

“It’s important to remark that during the last three seasons, exports to U.S.A. have decreased by 10%, so a bigger part of Chile’s exports has been shipped to other countries such as continental Europe, the U.K., Hong Kong-China and Korea. The last one became an attractive destination for Chile in 2012, after entering that market.

The U.S. is Canada’s main provider. The latter is the world’s second-largest consumer and 79% of its blueberry imports come from the southern neighbor, followed by the Far East with 14% and Europe with 5%.
AREA AND WORLD PRODUCTION

Worldwide Blueberry plantations (Highbush) in 2012 covered 85,000 ha. “If we compare this figure with plantations in 2005, there was a growth of 115%,” González said.

González also stated the U.S. had the largest area, with 38,000 ha. The principal production areas were Michigan with a 25% of the national area; Georgia with 19%; and Washington and Oregon, each with a 10%.

As for Chile, the South American country has a total amount of 15,000 ha, with 57% located in the southern regions of Maule and Bio-bio; followed by 28% located in Araucanía, Los Lagos and Los Ríos further to the south; 9% located in the Santiago Metropolitan region and the Libertador General Bernardo O’Higgins region; and 6% located in the northern cities of La Serena and Valparaiso.

In 2012, Canada registered an area exceeding 10,000 ha, with British Columbia as the main highbush Blueberry producer.

Worldwide blueberry production exceeded 380,000MT in 2012. González explained that the U.S. cultivated about 210,000MT of which 126,000MT were sold as fresh fruit and 84,000MT were frozen blueberries. As for Canada, its production was 52,000MT of which 22,500MT were sold as fresh fruit and 29,500MT were sold frozen. That year, Chile’s production was about 95,000MT of which 25,000 MT was frozen fruit.

BLUEBERRY, WORLD: TOTAL AREA IN HECTARES

<table>
<thead>
<tr>
<th>SUPPLIER</th>
<th>2005</th>
<th>2010</th>
<th>2012</th>
<th>%VAR. 12 VS 10</th>
<th>% PART.</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S.A.*</td>
<td>21,000</td>
<td>27,844</td>
<td>31,080</td>
<td>12%</td>
<td>36%</td>
</tr>
<tr>
<td>CHILE</td>
<td>4,400</td>
<td>12,000</td>
<td>14,800</td>
<td>23%</td>
<td>17%</td>
</tr>
<tr>
<td>CANADA*</td>
<td>5,200</td>
<td>8,400</td>
<td>10,200</td>
<td>21%</td>
<td>12%</td>
</tr>
<tr>
<td>OTHERS</td>
<td>9,216</td>
<td>22,378</td>
<td>29,788</td>
<td>33%</td>
<td>35%</td>
</tr>
<tr>
<td>TOTAL WORLD</td>
<td>39,816</td>
<td>70,622</td>
<td>85,868</td>
<td>22%</td>
<td></td>
</tr>
</tbody>
</table>

MARKETS

BLUEBERRY: MONTHLY EXPORT DYNAMIC (TONS)

Source: TRADEFI / SAG - ASDEX / IQonsulting
### Blueberries: Annual Exports by Market (Tons)

<table>
<thead>
<tr>
<th>Market</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>% Var 13Vs12</th>
<th>% Part. 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S.A.</td>
<td>33.426</td>
<td>51.329</td>
<td>62.158</td>
<td>53.181</td>
<td>-14%</td>
<td>75%</td>
</tr>
<tr>
<td>Europe</td>
<td>4.514</td>
<td>7.585</td>
<td>10.970</td>
<td>12.301</td>
<td>12%</td>
<td>17%</td>
</tr>
<tr>
<td>Far East</td>
<td>1.032</td>
<td>1.761</td>
<td>2.550</td>
<td>4.109</td>
<td>61%</td>
<td>6%</td>
</tr>
<tr>
<td>Canada</td>
<td>229</td>
<td>626</td>
<td>768</td>
<td>965</td>
<td>26%</td>
<td>1%</td>
</tr>
<tr>
<td>Middle East</td>
<td>0</td>
<td>3</td>
<td>36</td>
<td>91</td>
<td>153%</td>
<td>0%</td>
</tr>
<tr>
<td>Latin America</td>
<td>83</td>
<td>54</td>
<td>66</td>
<td>106</td>
<td>62%</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>39.285</td>
<td>61.359</td>
<td>76.546</td>
<td>70.753</td>
<td>-8%</td>
<td>-</td>
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</tbody>
</table>

Source: iQonsulting

### U.S.A.

<table>
<thead>
<tr>
<th>Month</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
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<tbody>
<tr>
<td>Tons</td>
<td></td>
<td></td>
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<td>10</td>
<td>12</td>
<td>10</td>
<td>8</td>
<td>4</td>
<td>5</td>
<td>4</td>
<td>3</td>
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Source: TRADEMAP / SAG - ASOEX / iQonsulting

### MERCADO 2009 2010 2011 2012

<table>
<thead>
<tr>
<th>Market</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>% Var 13Vs12</th>
<th>% Part. 2012</th>
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</thead>
<tbody>
<tr>
<td>U.S.A.</td>
<td>59.663</td>
<td>52.978</td>
<td>54.486</td>
<td>87.318</td>
<td>60%</td>
<td>99%</td>
</tr>
<tr>
<td>Europe</td>
<td>830</td>
<td>1.386</td>
<td>687</td>
<td>696</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Far East</td>
<td>138</td>
<td>328</td>
<td>269</td>
<td>322</td>
<td>20%</td>
<td>0%</td>
</tr>
<tr>
<td>Africa</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>80</td>
<td>-</td>
<td>0%</td>
</tr>
<tr>
<td>Oceania</td>
<td>44</td>
<td>225</td>
<td>206</td>
<td>44</td>
<td>-79%</td>
<td>0%</td>
</tr>
<tr>
<td>Middle East</td>
<td>16</td>
<td>0</td>
<td>0</td>
<td>17</td>
<td>-</td>
<td>0%</td>
</tr>
<tr>
<td>Latin America</td>
<td>0</td>
<td>131</td>
<td>0</td>
<td>0</td>
<td>-</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>60.691</td>
<td>55.048</td>
<td>55.648</td>
<td>88.477</td>
<td>59%</td>
<td>-</td>
</tr>
</tbody>
</table>

Source: iQonsulting

### CANADA

<table>
<thead>
<tr>
<th>Market</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>% Var 13Vs12</th>
<th>% Part. 2012</th>
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<tbody>
<tr>
<td>Canada</td>
<td>35,575</td>
<td>41,333</td>
<td>48,200</td>
<td>42,741</td>
<td>-11%</td>
<td>79%</td>
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<tr>
<td>Far East</td>
<td>4,499</td>
<td>5,604</td>
<td>5,718</td>
<td>7,833</td>
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<td>14%</td>
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<td>Europe</td>
<td>9,308</td>
<td>5,058</td>
<td>4,298</td>
<td>2,497</td>
<td>-42%</td>
<td>5%</td>
</tr>
<tr>
<td>Middle East</td>
<td>293</td>
<td>105</td>
<td>523</td>
<td>390</td>
<td>-25%</td>
<td>1%</td>
</tr>
<tr>
<td>Oceania</td>
<td>225</td>
<td>263</td>
<td>286</td>
<td>380</td>
<td>33%</td>
<td>1%</td>
</tr>
<tr>
<td>Latin America</td>
<td>88</td>
<td>358</td>
<td>297</td>
<td>328</td>
<td>10%</td>
<td>1%</td>
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<tr>
<td>Africa</td>
<td>48</td>
<td>74</td>
<td>130</td>
<td>70</td>
<td>-46%</td>
<td>0%</td>
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<tr>
<td><strong>Total</strong></td>
<td>50,036</td>
<td>52,795</td>
<td>59,452</td>
<td>54,239</td>
<td>-9%</td>
<td>-</td>
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</tbody>
</table>

Source: iQonsulting
Inclement weather in Argentina led to volatile supply conditions in Northern American blueberry markets from September to November, while frosts in Chile also impacted supply.

Frosts led to a substantial reduction in early blueberry imports from Argentina in late September and early October, leading to some of the highest prices seen in years, according to Giumarra Companies' vice president of global development Tom Richardson.

"Once supplies became more normal, the reaction or the drop in price was really dramatic. We saw perhaps in a 10-day period, a US$20 per carton drop in FOB (freight on board) values here," Richardson said.

"The net effect of the extremely high early prices was that once volumes did start coming in on a more normal level, the retailers were very slow to react and obviously there was a back-up of stocks here in the market."

Richardson’s assessment of the early season was not too different to that expressed by HBF International managing director Doug Perkins.

"Poor weather in both Argentina and Chile along with an earlier than normal end to the U.S. production created a frenzy in late October and early November," Perkins said.

"Due to this frenzy, the price increased to the point that demand stalled while production was increasing. As a result a correction in the marketplace took place."

Richardson said importers would have to become more creative to take the edge off the early Southern Hemisphere market, with expectations Argentina’s supply from regions like Tucuman and Salta set to grow in the next three to five years, making sea freight a more viable option.

"Historically, sending fruit from Argentina by vessel to North America has been difficult; the vessel service itself is a fairly long transit, and then you have the added challenge of fulfilling cold treatment in transit, which comes with additional risks," he said.

"I believe that as early volumes from Argentina increase over the next five years, it’s going to be important that the Argentina industry look to deliver more fruit to market by ocean, whereas today the vast majority of the fruit arrives by air, where the costs are significantly higher."" Perkins said that as the market entered the holiday period, higher than normal Chilean air freight blueberry shipments were expected to fill production gaps left by the smaller Argentine crop. He added this emphasis on air shipments was also due to early season damages in Chile.

"Weather events the past few
years have caused all of us to make adjustments to our original distribution plans," he said.

"Last year was a difficult one in the sense that there was quality issues throughout. While increased producing acreage will help to insure volume, it’s going to be the quality of that volume that will help see this industry grow with success for the long haul."

Despite Chile’s frosts, Richardson mentioned the fact that as varieties varied in any given orchard with different budding and flowering times, along with the country’s vast geographical differences, this meant a significant impact on supply was unlikely.

"I don’t believe that the frost for the overall fresh export volumes from Chile is going to be felt in any sort of dramatic way here in the market," he said.

"Had there not been any frost, we would certainly be looking at a record fresh export volume from Chile, and that means most likely a record import volume for North America which is still the largest destination for fresh Chilean blueberries.

"We’re expecting a normal flow of product from Chile to North America, barring any further weather event that could negatively impact the production."

In terms of other suppliers, Richardson was hesitant to say too much about Peru, as it remained to be seen what part the country would play in the future.

"We did start importing some Peruvian blueberries this year which coincided with the beginning of the Argentina deal – the fruit was being brought here by air...it needs to either be fumigated or complete a cold treatment process.

"The fruit we received from Peru this year was pretty limited in volume but quality was good, the acceptance from our customers was also good.

"Certainly Peru is going to be a player in the import blueberry scene here in North America over the coming years."

On the demand side, Richardson said consumption continued to grow but this needed to match the rise in supply, not just from abroad but almost all major growing areas in Canada, the U.S. and Mexico.

"We think larger packs are helping lead consumers to pick up greater volumes for purchase, and we think that’s something that will continue – I think the 18oz pack is here to stay."

Perkins said that to capitalize on higher production, promotion of larger pack sizes would be needed during peak arrival times in January and February.

"Demand is increasing and we as an industry need to continue efforts to see US consumption grow through a stronger message regarding the health benefits and the great taste these blueberries offer," Perkins said.

"In addition, we need to work harder than we ever have to fast track the opening of key markets like China, South Korea, and Australia which are happy consumers of fresh blueberries from other countries."
Argentina has strengthened over the years, taking full advantage of its early fruit.

Now one of the main South American blueberry providers, Argentina entered the business 10 years after its neighbor Chile, and by 2007 it had 4,200 hectares of blueberries.

Despite the ups and downs of Argentina’s plantation area – 2,900 ha currently counted – and the tough weather affecting some seasons, the blueberry business keeps getting opportunities, especially for its early fruit.

Argentinean Blueberry Committee (ABC) general manager, Inés Peláez, says the country made a varietal replacement toward early varieties “to exploit the harvest window” it has at the “best price.” Such varietal replacement occurred particularly in Tucuman and Concordia, Argentina’s main growing locations for the fruit.

Availability begins in August with Snowchaser variety, before the Sapphire, Spring High, Primadonna, Abundance and Emerald varieties make their appearance in September; and in October, the Jewel and Star varieties, both low chill highbush, are also available.

Although the U.S. is still the major destination for Argentina’s blueberry exports, in contrast with Chile, the country has started a new scheme that aims to European markets.

The Argentine blueberry industry has strengthened over the years, taking full advantage of its early fruit.

Opportunities remain for Argentine blueberries

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Shipping by Air vs Sea

According to Peláez, this "is an important matter for our country," since Argentina, unlike Chile, sends its exports by airfreight. For instance, during the 2012 season, 93% of total Argentine blueberry exports were made by air.

Peláez also remarks, "If we send the fruit by sea at the beginning of the season, we would lose the early fruit season, so we take the most advantage of the maximum price."

"Some seasons let you send more exports by sea, but others don’t because the fruit’s quality and the state in which it’s delivered are at stake."

"After rainy days, companies decide to send the product by air – not by sea – since they don’t want to risk the fruit quality. Only several days after the rainy season, once they have carefully checked out the crops’ state, they evaluate whether to send it by sea,” says Peláez.

Another important factor is the fruit price and the arrival of Chile’s product. If Argentina’s neighbors arrive later –as was the case this season—, Argentina will continue to ship by air.

"This year in particular, we shipped just a little by sea. Last
year (2012), we shipped about 7% vs 21% of the year before (2011)."

APHIS

By mid-2013, the United States Department of Agriculture’s (USDA) Animal and Plant Health Inspection Service (APHIS), published an additional treatment schedule for methyl bromide fumigation of blueberries for Mediterranean fruit fly and South American fruit fly.

This new treatment schedule allows Argentine and Uruguayan blueberry exporters to fumigate fruit at lower temperatures than under the previous treatment manual. Expectations are that the new level of 60.08°F will undoubtedly benefit fruit quality.

"Until last year, fumigation with methyl bromide had to be performed at 69.8°F. This temperature speeds up the ripening, causing a shortage of post-harvest life. Fortunately, due to the new limit of 60.08°F, the fruit quality has considerably improved."

Argentina’s initial export estimates were reduced from 17,000 metric tons (MT) to 15,000 MT due to weather issues, and dropped again following a hailstorm in Concordia. It is events like these that lead Peláez to think it would be hasty talk about future forecasts, and that the industry still has to develop further.

“Those who could export did it well. During the last few years, companies have become more professional in every productive, post-harvesting, logistics and marketing aspect.”

“Argentine blueberry investors had started with 5 ha or less. Currently, blueberry production is developed by highly professionalized fruit growers. It’s a strong industry, with both clear goals and long-term investments.”
Chilean blueberry production has increased constantly in recent seasons, not just for fresh fruit exports but also for frozen blueberries. This growth has made it necessary for the industry to open new markets.

Over the last two seasons in 2011-12 and 2012-13, the fresh blueberry trade has opened in markets like Korea, Thailand and the Far East in general. The volumes exported to these destinations are low compared to the total exported from Chile, but last season they grew considerably at a rate of 50% year-on-year.

The type and rate of growth in exports to the Far East will exclusively depend on the quality of fruit available. This is because values of the traded fruit are much higher than in other markets during the same week, adding to the fact the population is incomparably higher than other countries and markets were exports go currently.

As a result there is elevated growth potential, but that is not the only thing. We have to arrive with optimal fruit in a market that is very demanding in all the produce it imports, and that is located a great distance away from the production area. This is why we need to consider some factors of high importance when thinking about exports to these countries:

1. Quality of packed fruit. Fruit needs to be in an adequate state of physiological ripeness, accompanied by a blue color, bloom that is even and intact, uniform sizes above 14mm, and in summary, berries that have a very good “open appearance”.

2. Adequate fruit condition. We need to ensure that berries arrive in good condition, which means firm fruit without visible dehydration, and ultimately – and most importantly – without fungus or rotting. This final defect can be ostensibly reversed if some type of berry sanitization takes place during post-harvest or prior to entering cold storage, which if done correctly, eliminates or reduces inoculated pressure.

3. Cold chain management. The cold chain must be assured, not just in containers but from the minute the fruit is harvested. This means lowering the temperature as quickly as possible after picking, with the objective of lowering the respiration and metabolism of the berries. This eventually means a delay in senescence.

4. Use and management of post-harvest technologies. This needs to be done to reduce fruit senescence and ensure optimal arrivals in destination markets.

In terms of the use and management of post-harvest technologies, in recent years San Jose Packaging has been working to develop packaging for the blueberry industry.

In an optimal way, packaging can comply with all the industry’s requirements. In the last year, the industry has constantly sought modified atmosphere packaging (MAP) for blueberries, due to the great amount of benefits that have been seen.
with other fruits, which can be summarized as:

1. **Reduction of fruit dehydration**, due to less ventilated surface area in contact with the environment, with a subsequent loss in fruit weight.

2. **Maintenance of fruit freshness**, due to the delay of senescence or berry ripeness.

3. **Reduction in the growth and development of microorganisms**, due to the modification of the atmosphere's composition, increasing levels of carbon dioxide and reducing levels of oxygen.

To meet these requirements we have worked on every characteristic of our packaging:

1. **Mechanic properties**
   a) **Tensile resistance.** This is a characteristic of plastics that has to do with the point of rupture in the structure. The fewer mechanical properties the structure has, the more fragile it is, increasing the possibility of rupture or loss of atmosphere.
   b) **Resistance to puncturing or ripping.** This involves resistance to aggressions produced or caused by blunt and sharp materials respectively that put some kind of pressure on the packaging.
   c) **Rigidity.** This refers to the ease of packaging manipulation. Therefore, the more rigidity in the packaging, the less malleability you have.

2. **Optical properties.** Characteristics like low opacity and turbidity, and high translucency, allow for the fruit and its attributes inside the packaging to be observed.

3. **Resistance once sealed.** This property in particular allows us to maintain the atmosphere created inside the packaging, and is related to security and strength once it is sealed, or in other words, hermetically closed without contact with the external environment. For this we use sealable adhesives in the packaging that help us achieve an optimal seal, according to the aforementioned characteristics.

4. **Use of material that is 100% recyclable, 100% virgin.** This means we can work with packaging that is friendly for the environment, and that it can remain in contact with foods; values that will be valued by接收ers.

5. **Permeability and management of ventilated areas.** These are intrinsic properties in the structure of plastics that packaging is made from, and have to do with the rate of respiration in each specie and its varieties.

Following the points above, we can achieve optimal arrivals of fruit at destination by joining forces with all parts of the blueberry production chain. But we can only do that if the cold chain is adequate, as it wouldn’t help us at all to have the best quality fruit, the necessary packaging or the latest technology developed for blueberries if we don’t have the necessary cold chain to maintain the fruit throughout its course.
Innovation and leadership in agricultural service

Copper and sulfur-based fungicides stand out among the range of products used to prevent diseases in fruit trees and vines.

With more than 60 years of experience developing chemical products, the Chilean company Quimetal has developed a complete range of products adaptable to the most diverse requirements both nationally and internationally.

Among its line of agricultural products are copper-based and sulfur-based fungicides used as preventive control methods for fruit tree and vine diseases. Quimetal offers other chemical products used in the pulp and paper industry, gold mining and water treatment.

In recent years, the company has added a complete line of fertilizers, for agricultural use as well. "The benefit of the copper and sulfur products is that we have both molecules certified for organic use. There is a competitive advantage in relation to other products, especially considering the growing importance of phytosanitary safety," say Leandra Bruzzone, Quimetal’s marketing director.

The quality of Quimetal’s products is recognized both nationally and internationally. Through strategic alliances with leading companies worldwide, Quimetal provides copper and sulfur-based products to countries in all of the continents.

"Quimetal has contracts with multinational companies to manufacture copper products throughout the world. Our quality and production standards are within those strict parameters," says Hugo Pérez, Quimetal’s national sales director.

"We sell our sulfur in the U.S., Australia, New Zealand, Italy, Turkey, and Bulgaria among others places. Our copper-based fungicides go to 25 European countries. If you consider that there’s a transit time of 45 days for the majority of these destinations, our clients are still willing to wait for our products because we are talking about a high quality standard," Bruzzone says.

Pérez states that copper products, for example, are manufactured with a copper base that has a high purity standard. As a result, the amount of heavy metals is extremely low.

MARKET CHANGES

In recent years, market has
evolved towards the use of products with WG formulation or water dispersible granules. For over 10 years, a majority of Quimetal’s products have had this type of formulation.

“In copper, all the products we sell in Chile are WG formulations,” Pérez says. This benefits the operators of these products. In the past, products were formulated as a powder, which was too easy to inhale by field operators. WG granules, instead, offer lower risk.

In the copper-based product line, Quimetal offers cuprous oxide which is sold under the Cuprodul brand name. This product has both WG and flowable formation options. Quimetal offers copper hydroxide (Hidro-Cup WG), Bordeaux mixture (Caldo Bordalés 25 WG) and copper oxychloride (Oxi-Cup WG) as well.

“Today the copper product market in Chile is worth approximately US$17 million. The tendency since 2010 has shown enormous growth for hydroxide,” Pérez says, who emphasizes the 20% growth experience by this category in the last four years.

Another product that has grown by US$1 million in the copper market is Bordeaux mixture (Caldo Bordalés). This product tends to be used in two applications a year because it is believed to be more resistant to rain.

Currently, Quimetal has around one third of the copper product market in Chile, which includes six major companies. In recent years, there has been an exponential growth for liquid and flowable copper formulation due to their benefits during field application.

“I think we have been pioneers in manufacturing liquid copper and we are confident that in the future we will have copper molecules in a flowable form. This demonstrates our capacity for innovation, as we are always carrying out trials and working on innovations to give a better service to the agricultural sector,” Pérez says.

Quimetal is leader also in the sulfur market in Chile with around a 60% market share. “Copper is focused to control fungus and bacterial canker,” says Pérez. “Applications occur primarily during the winter time when leaves fall, leaving wounds exposed to infections,” he explains.

Quimetal is an innovative company that is constantly developing new businesses and products with the objective of gaining new markets and satisfying strict quality requirements by our clients.

To learn more about Quimetal’s range of products, visit www.quimetal.cl.
Big step for South African blueberries in 2013

South Africa will now be able to provide blueberry volumes much earlier in the season, helping to smoothen a supply transition traditionally captured by Argentina.

The onset of Snowchaser blueberry production has led to a much earlier South African season this year, extending the country’s export window from its historical period of early October to January.

Eurafruit managing director Trevor McKenzie said a large proportion of the total crop was dedicated to the Emerald and Jewel blueberries that began to have a presence in 2006, but further varietal introductions were changing the country’s blueberry portfolio.

“We started picking this year in July, and the peak of the Snowchaser was at the end of September, beginning of October — that enabled us to overlap nicely with the end of the Northern Hemisphere crop in the U.K. and Europe,” he said.

“The prices for us start climbing as soon as the tail end of the European crop finishes when the Polish, Dutch and U.K. crops come to an end.

“That’s a very attractive window for us at the moment, but of course everyone’s trying to fill that gap because the prices are so good; unfortunately for the Argentineans this year, they had some serious weather issues that have really hit them during the early part of the season.”

However, he expected Argentina would be back strongly in the market next year during that timeframe, which Peru would be looking at as well as very serious competitors.

He said the season marked the first in the South African blueberry industry’s history with more sea freight expected than air shipments.

“We would normally do air freight during October and then in November we swap from air to sea and do both for a few weeks.”

He said the U.K. was South Africa’s main market, but more fruit was increasingly sent to continental Europe.

“There’s big demand from the Far East – Singapore and Hong Kong especially –, and we have a lot of enquiries from that direction, but up until now it’s been a matter of servicing one market properly before we try and service all kinds of markets.

“Now we are certainly in a situation where we have to diversify our markets and expand into others as we grow because we are on a serious growth curve.”

The executive added some varieties introduced from the United States had not proven appropriate for the South African soil and climate, and that the country couldn’t “play with latitude” as much as other growing countries like Chile.

A recently released South African Berry Growers’ Association (SABPA) survey, conducted in November last year, found the industry had 447.6 hectares of blueberries planted.

LOGISTIC SERVICES IN ROTTERDAM

- Import handling — including Consolidations
- Import Customs Clearance and Export Documentation
- Fruit Quality Inspections
- On Line Stock Information System
- Sorting and Repacking services
- Cool storage — 3,500 pallets, 25 cells
- European Distribution

Honderland 50 - 2676 LS Maasdijk-The Netherlands
phone (0031-0) 174 - 530545 - fax (0031-0) 20 - 7969211
mobile : (0031-0) 6 51 900661
email afi@lbprotterdam.nl
Canada-EU free trade agreement:

British Columbia looks forward to entering the EU blueberry market

After a good but early 2013 blueberry season that caused problems for growers, the British Columbia Blueberry Council has high expectations for opening markets, with special focus on Europe.

The council has already set off fierce competition with the U.S. in reaching worldwide markets, especially following the 2013 season.

According to BC Blueberry Council executive director, Debbie Etsell, harvests all over North America were good, but she cautioned “British Columbia is usually the last region to come into season, so the problem was compounded for us, and our producers certainly had to work harder in order to get our products into stores with so much fruit already out there.”

Due to this, opening new markets in the EU has become essential for the executive director.

Etsell said she was hopeful about the tentative deal reached between Canada and the EU, called a Comprehensive Economic and Trade Agreement (CETA), which will remove about 95% of EU tariffs on Canadian products. However, the official documentation has not been formalized since it has to be translated into the 24 official languages of the EU and then be approved by the 28 country members, along with all Canadian provinces and territories; a process that could take about two years.

The new agreement will allow this council and the producers to further develop our bonds with our European markets. Given the increase in our production levels each year, we are always looking for different ways to strengthen our current markets and to establish new ones,” Etsell said.

“It’s our hope that the deal removes the current EU tariff on fresh and frozen blueberries, in order to reduce the fruit cost for our customers. Anticipating this, we’ve been taking part in trade and marketing fairs all over Europe in the last few years.”
Today, British Columbia exports blueberries that are mostly processed, along with a small fraction of fresh fruit, to several European markets. The main ones are Germany, the Netherlands, the U.K., Belgium, Iceland and Ireland. The Canadian province’s supply comes from highbush blueberries with Elliot, Duke and Bluecrop as its main varieties.

The British Columbia Blueberry Council has over 800 blueberry growers and remains as one of the leading blueberry producers in North America.
Do you know where in the world your next manager is? We do.
China's produce industry's news source