

Voluntary Report – Voluntary - Internal Distribution

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Post: Lima

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Report Highlights:

FAS Lima forecasts Peruvian blueberry production in marketing year (MY) 2025/26 (May 2025 to April 2026) to reach a record 355,000 metric tons (MT), with exports expected to reach 335,000 MT. Peruvian blueberry production is on track for a remarkable production recovery in MY 2025/26 compared to the year before. If normal weather conditions prevail, Peruvian blueberry production may likely increase due to the scale benefits of consolidated field expansion, increased foreign direct investment, and resilient genetics that maintain productivity despite potentially disruptive weather conditions.

Table 1. Production, Supply, and Distribution; Fresh Blueberries (MT)

HS: 081040

Blueberry, Fresh Market Year Begins	2022/23 May 2022	2023/24 May 2023	2024/25* May 2024		2025/26** May 2025	2026/27** May 2026
Peru	New Post	New Post	New Post	% change from prev. year	New Post	New Post
Area Harvested (HA)	17,500	18,500	20,500	11%	22,000	22,500
Production (MT)	310,000	262,000	340,000	30%	355,000	365,000
Imports (MT)	0	0	0	-	0	0
Imports from U.S. (MT)	0	0	0	-	0	0
Total Supply (MT)	310,000	262,000	340,000	30%	355,000	365,000
Exports (MT)	290,000	242,000	320,000	32%	335,000	345,000
Exports to the U.S. (MT)	156,000	135,000	178,000	32%	188,000	195,000
Total Consumption (MT)	20,000	20,000	20,000	0%	20,000	20,000
Total Distribution (MT)	310,000	262,000	340,000	30%	355,000	365,000

*FAS Lima estimate

**FAS Lima forecast

Production

FAS Lima expects Peruvian blueberry production to reach 355,000 metric tons (MT) for marketing year (MY) 2025/26 (May 2025 to April 2026), increasing four percent from the previous year. Peru's blueberry production area grew significantly in the past decade, from 80 hectares in 2012 to about 20,500 hectares currently in production, averaging 65 percent annual growth. Peru's modern coastal agriculture has grown solid and plays a leading role.

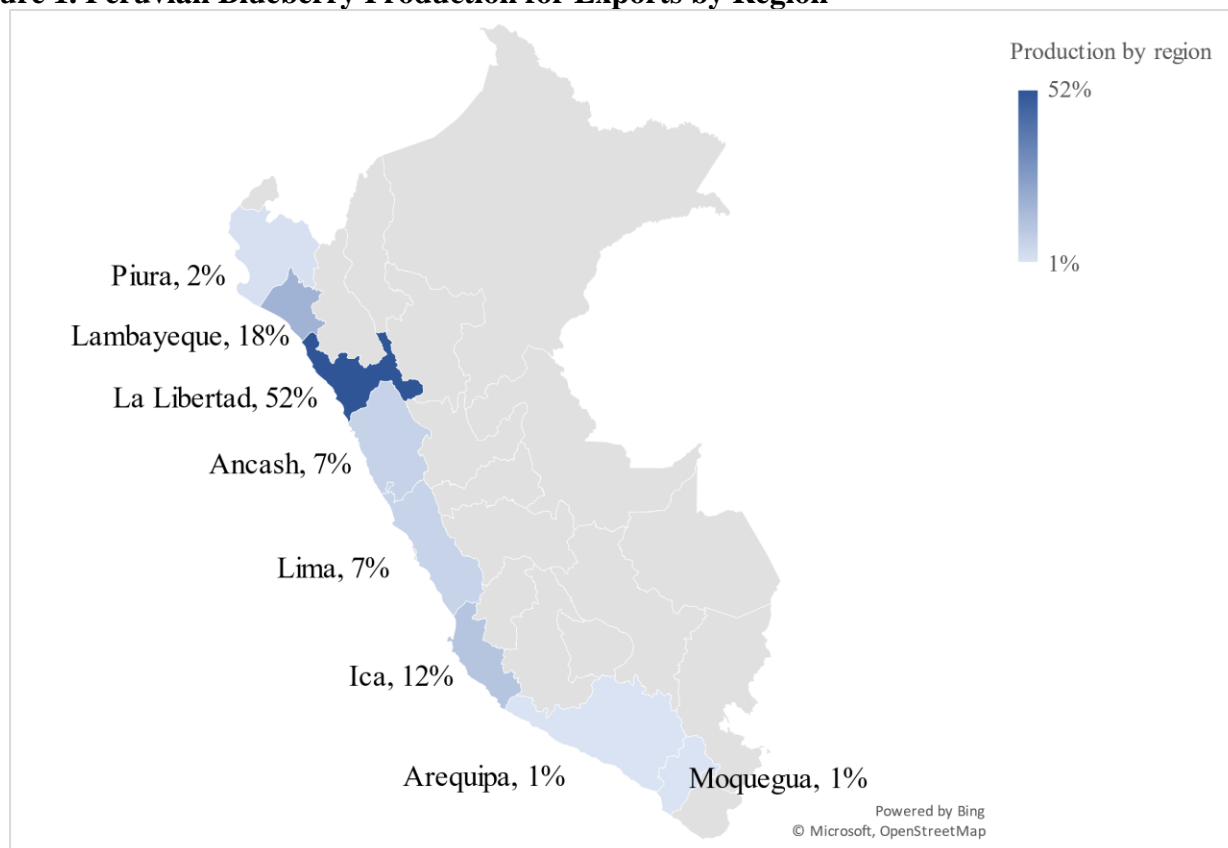
Blueberry production demands a high initial cost of investment - land, technology, genetics, labor, tailored agriculture practices, post-harvest operations, and sophisticated irrigation systems – yet the industry continues drawing interest from local and foreign capital sources. The main costs for establishment are drip irrigation, land, and processing plants. The estimated investment for establishing one hectare of blueberries ranges from \$30,000 to \$150,000, with an average of \$65,000, although several firms have noted more recent investments have averaged \$80,000 or higher. According to FAS Lima contacts and analysis, complete return on investment can be made in as little as two years, even on the higher end of the range. Peru offers the possibility to test new varieties at a fast pace (eight months on average). Currently, companies are testing high performance varieties with a wide range of weather and shipping resilience characteristics giving genetics a key role.

Peruvian blueberries are produced both in the ground and in pots where soil characteristics are customized (from coconut to pine chips blends). Large net barriers protect the blueberries from the wind

and sand avoiding any hazard to the fruit. Yields average 15-20 MT per hectare in the ground and 20-35 MT in pots. Also, a sunny, warm, and dry climate with cool nights allow for nearly year-round harvest in most areas. Coastal production areas offer more opportunities to access skilled labor operators, transportation and logistics, irrigation systems, and access to ports and airports.

Blueberry operations have successfully established along the coastal region where state-of-art irrigation projects take place. The 80 percent of blueberry production for exports take place in the northern region of Peru (La Libertad, Lambayeque, Ancash, and Piura). Peru has prioritized key irrigation investments to expand agricultural areas, to protect from drought, and to support Peru's strategy to become a global agriculture powerhouse in the coming years.

Figure 1. Peruvian Blueberry Production for Exports by Region



Source: FAS Lima - data from ProArandanos

Peru's blueberry harvest is exclusively hand-picked and labor intensive to avoid fruit damage. According to official data, 135,000 jobs are generated from this industry, with 60 percent of them belonging to women. Specialty, highly skilled harvesting crews are paid more for fruits heading to higher price markets. Due to lower productivity in the MY 2023/24 season, the industry required a third of the regular labor force according to FAS contacts, impacting negatively the economies of Peru's northern regions. The recovery of production in the MY 2024/25 and continued expansion of harvest area might suggest robust production in the coming years.

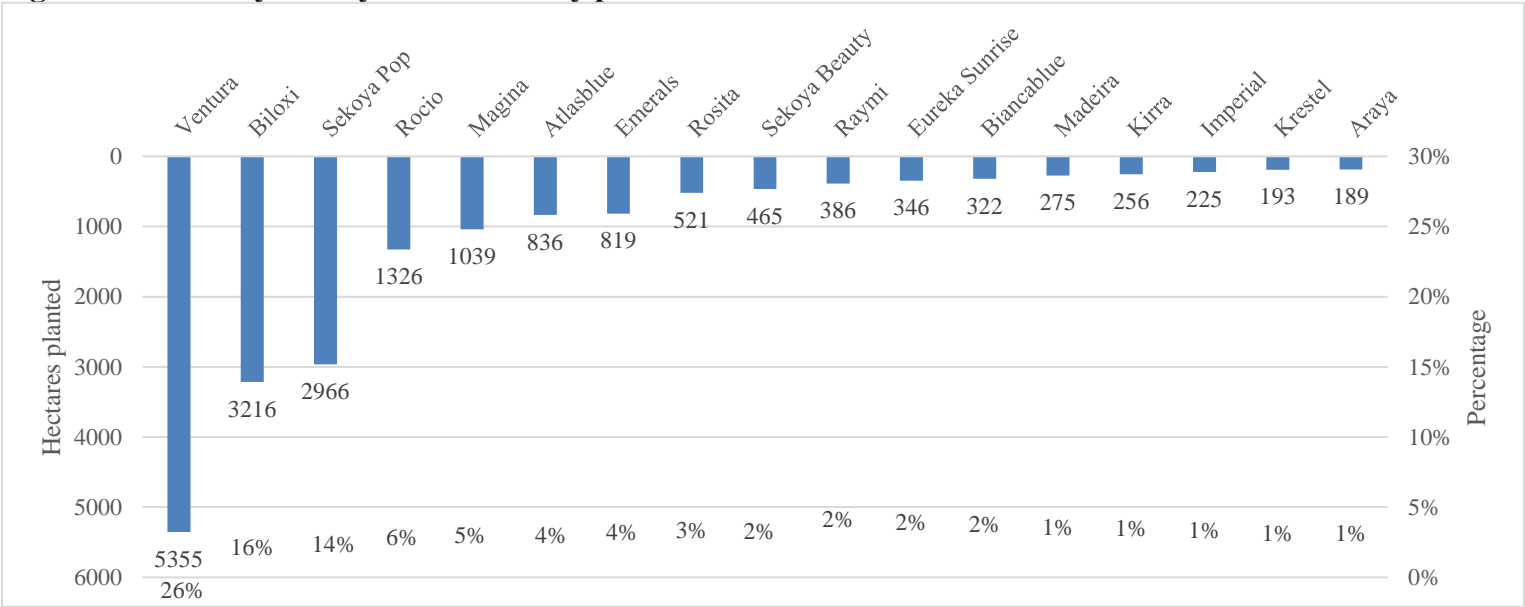
Figure 2. Blueberry production in the coastal area – Ica, Peru



Source: FAS Lima

Currently the most popular variety for exports are Ventura with 26 percent planted area, Biloxi with 16 percent, Sekoya Pop with 14 percent, Rocio with 7 percent, and other with 36 percent. Peru’s blueberry boom grew with Biloxi accounting 60 percent planted area in 2016. The 90 percent of Peruvian blueberry for exports is conventional.

Figure 3. Blueberry variety distribution by planted area



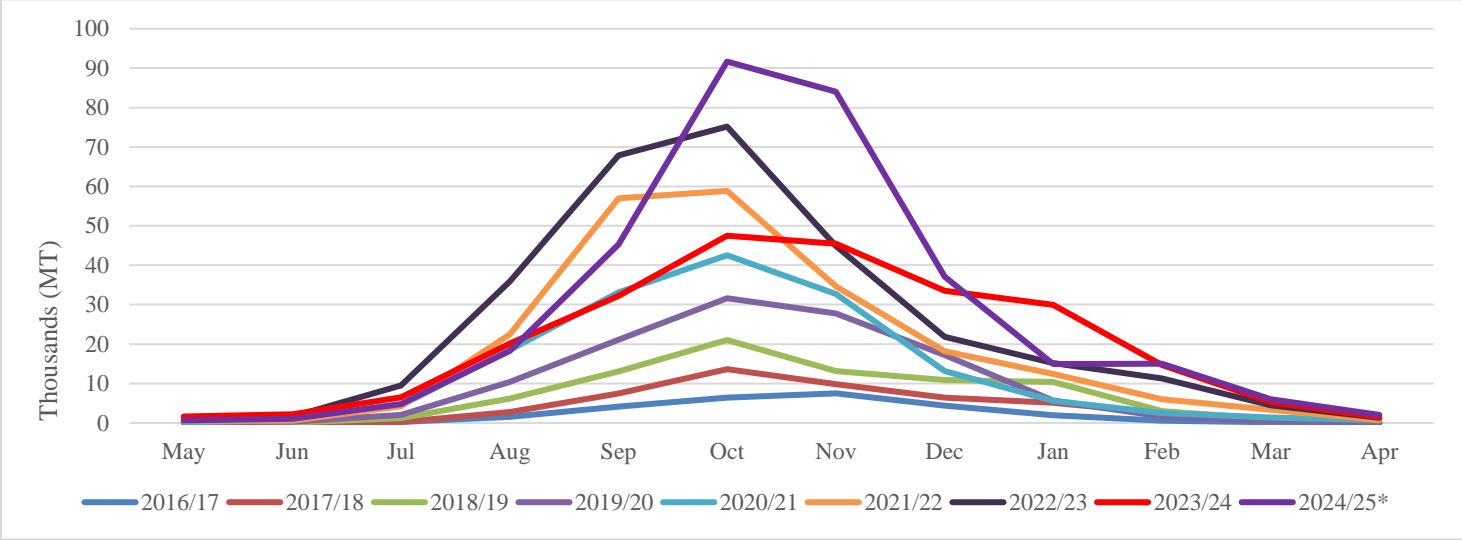
Source: ProArandanos

Blueberries are gaining popularity among Peruvians since it was an unknown fruit a decade ago. Currently offered at supermarkets, wet markets, convenience stores, and fruit stands, blueberries are now consumed daily in Peru in a variety of ways, such as in smoothies, juices, yogurts, desserts, cookies, cakes, ice creams, and even cocktails. The extracts have hit the cosmetic industry to land in shampoos, conditioners, and hand creams.

Trade

FAS Lima estimates Peruvian blueberry exports to increase by 32 percent in MY 2024/25, a recovery to 320,000 MT. Peru’s blueberry industry has built a reputation as an innovative, consistent, and quality supplier for global markets becoming a key provider. In MY 2024/25, the exports seasonality was pushed due to a cooler winter and peaked between October to November.

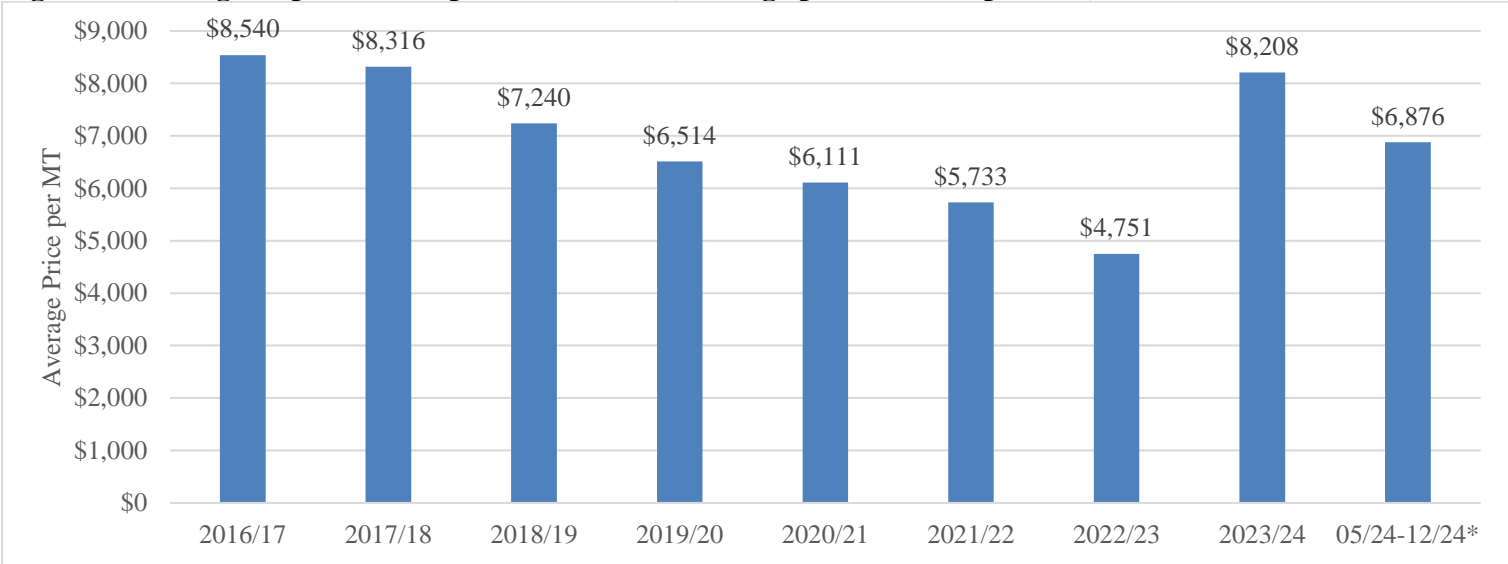
Figure 4. Peruvian Blueberry Monthly Exports Seasonality



* estimated by FAS Lima.

As Peruvian blueberry exports grow consistently, export prices began to fall year after year. However, in MY 2023/24 the average export price reached to \$8,208 per MT, much higher than expected due sudden limited supply. In MY 2024/25, average prices are down but higher than the dropping prices trend from MY 2016/17 to 2022/23 which pictures recovery.

Figure 5. Average Export Prices per Metric Ton (Average price in USD per MT)



*May to December 2024 Source: Peruvian Customs.

In 2024, average prices per month are inversely proportional to volume. In MY 2024/2025, the average price paid by the United States was \$6,840/MT, the Netherlands \$6,503/MT while Hong Kong paid \$7,536/MT, the United Kingdom \$6,632, and China \$7,301/MT.

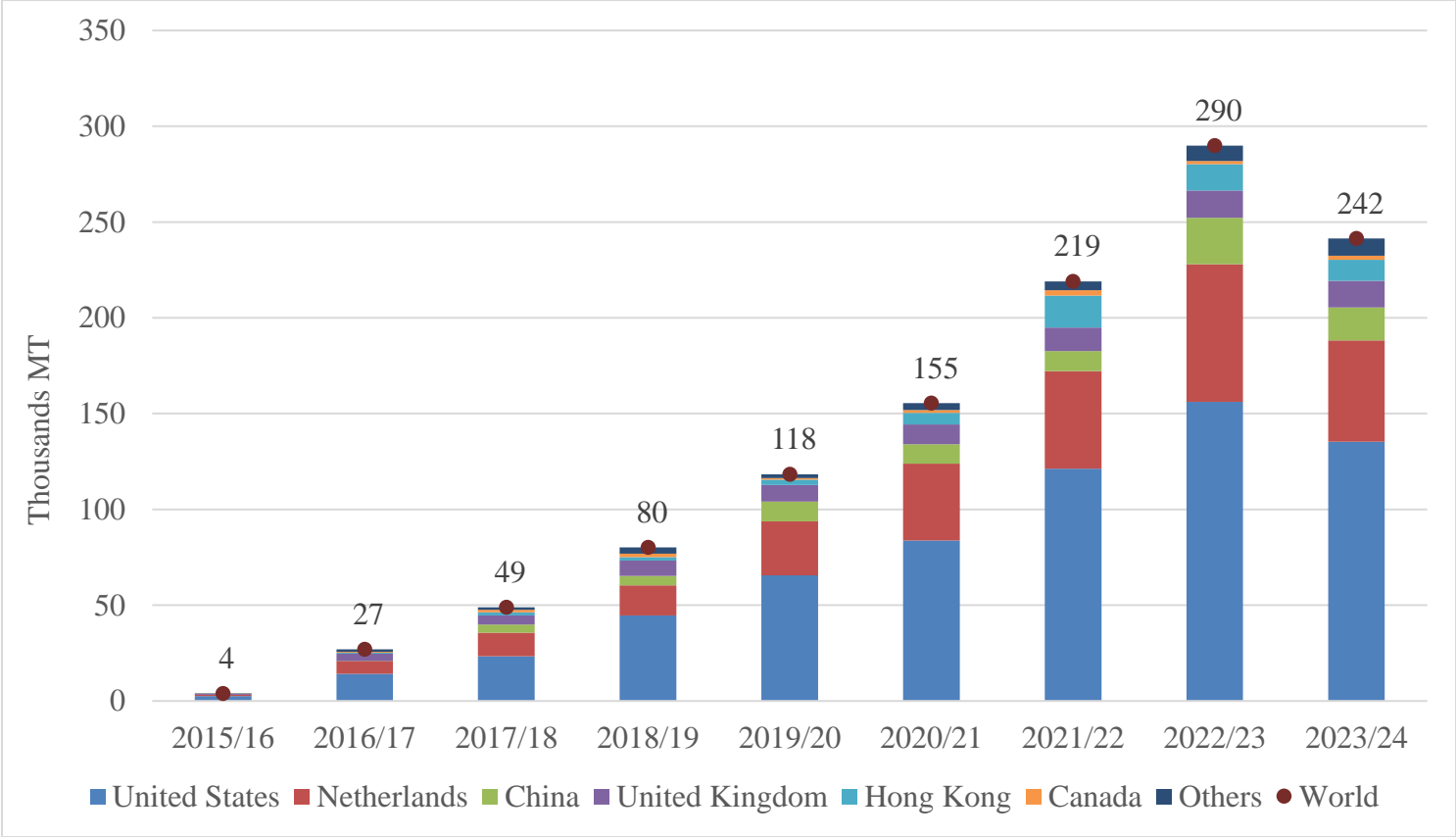
Figure 6. 2024 Monthly Average prices US\$/MT



Source: Peruvian Customs

In MY 2023/24, Peru exported fresh blueberries primarily to the United States (53%), Netherlands (23%), United Kingdom (9%), China (5%), and Hong Kong (5%), Total fresh exports in MY 2023/24 were down 17 percent from the previous year, decreasing from 290,000 MT to 242,000 MT. For the U.S. market, Peruvian blueberry exports have grown from 2,485 MT in MY 2016/17 to 135,367 MT in MY 2023/24, a 56 percent increase on average per year.

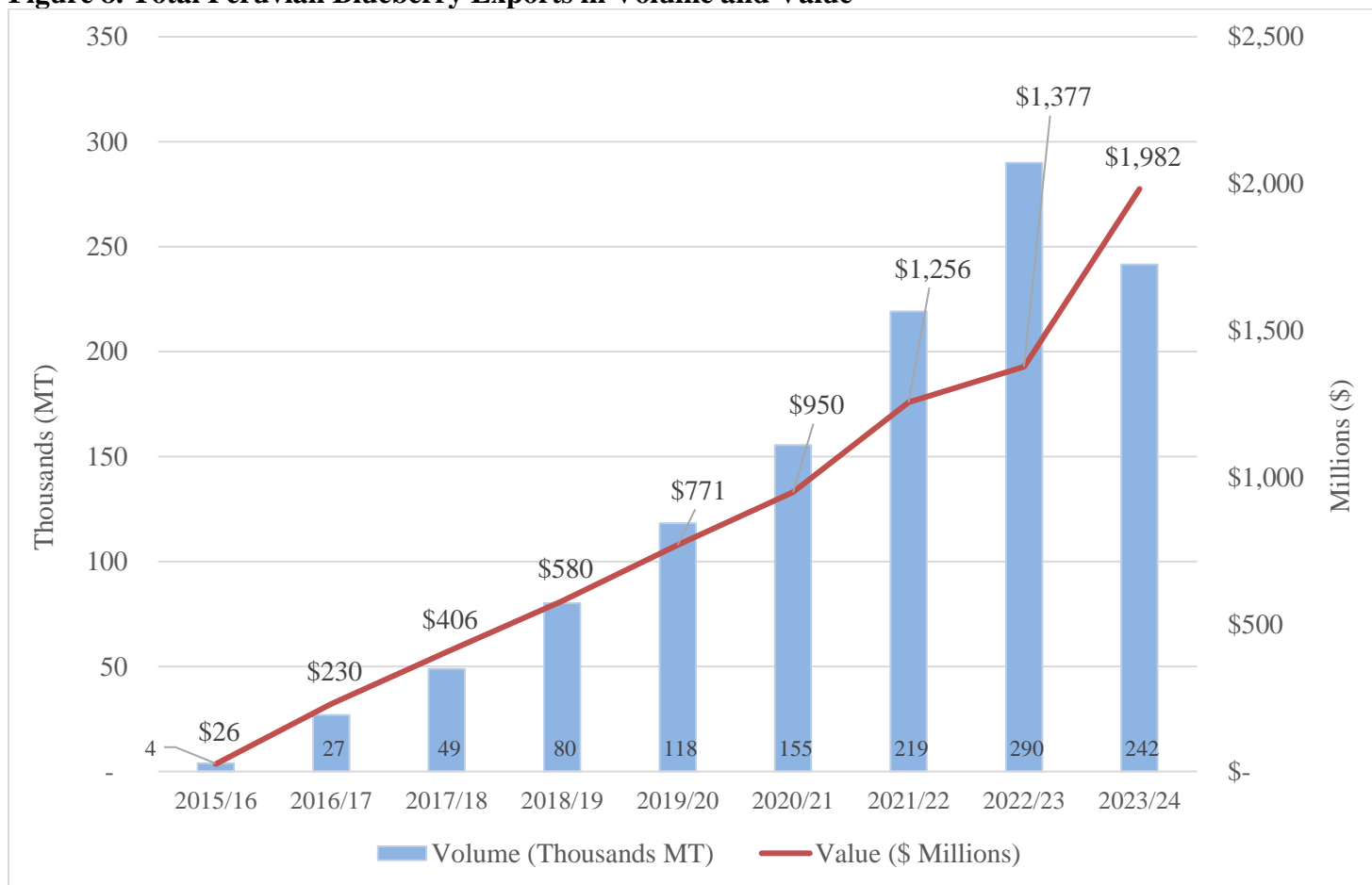
Figure 7. Peruvian Blueberry Exports Destinations



Source: Peruvian Customs

Peru is building a remarkable blueberry industry that has boomed in the last 10 years from \$26 million to \$2 billion dollar in MY 2023/24. For MY 2024/25 Peru’s exports might reach to \$2.3 billion dollars.

Figure 8. Total Peruvian Blueberry Exports in Volume and Value



Source: Peruvian Customs

Fresh blueberries are usually packaged in plastic clamshells and top seal punnet trays weighing 125g (4.4 oz), 150g (6 oz), 200g, 11 oz, pinta Flat, and 18 oz. For bulk product 2.5 kg, 3.0 kg or 3.4 kg.

There is a strong foreign investment component in Peru blueberry production. FAS Lima estimates that U.S. investment in the Peruvian blueberry industry accounts for roughly 6,500 hectares, totaling around \$450 million.

In the U.S., the top destination of Peruvian blueberries by port is Philadelphia with 57 percent, Hueneme 24 percent, Miami 13, Los Angeles 2 percent, Long Beach 1 percent, and other ports 2 percent.

Policy

Peruvian blueberries benefit from the U.S. - Peru Free Trade Agreement (PTPA), allowing Peru to export blueberries to the United States tariff-free. This bilateral agreement, signed in 2009, has helped grow the blueberry in both countries. The U.S. blueberry genetics are shipped south to Peru zero tariff, where they are grown, harvested, and shipped back for their consumption in the U.S. Over fifty percent of Peruvian blueberries are consumed in the United States.

Peru's Agricultural Sanitary Agency (SENASA) plays a leading role in the monitoring and control of fresh fruits for exports. Every harvest campaign, SENASA updates a list of registered production areas and processing plants. According to official current data, SENASA has registered 401 blueberry production sites. In addition, 72 packing and treatment facilities have been registered for MY 2024/25.

Production farms: [Lugar Producción Arándano \(senasa.gob.pe\)](http://senasa.gob.pe)

Packing & Treatment plants: [Empacadora Arandano \(senasa.gob.pe\)](http://senasa.gob.pe)

PROARANDANOS is the Peruvian blueberry trade association, which represents 80 percent of the total blueberry export industry. Founded in 2014, PROARANDANOS leads industry efforts towards research, development, and public and private coordination.

Peruvian blueberries have access to 40 markets, most recently gaining access to Bolivia in late February 2025.

Since November 2024, the newly open Chancay port has offered express service to Shanghai, with a 12-day time saving. Export volumes to Asia are expected to rise - especially in the coming MY 2025/26 season.

Attachments:

No Attachments.