

Voluntary Report – Voluntary - Public Distribution

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Report Name: South African Blueberry Market Analysis

Country: South Africa - Republic of

Post: Pretoria

Report Category: Fresh Fruit

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Report Highlights:

South Africa is expanding its role in the global blueberry market, supported by favorable production conditions and strategic market positioning. Blueberry production in South Africa has grown to 38,900 metric tons (MT) in marketing year (MY) 2025/26. Blueberry consumption in South Africa is growing, but production continues to be export focused. In MY 2024/25, South Africa exported 22,605 MT of blueberries, a 6.7 percent increase from the previous season. While the United States recently gained access to the South African blueberry market and could see some exports, the strongest opportunities remain in propagating materials.

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Report Notes:

The marketing year (MY) for blueberries is September - August. The exchange rate used in this report (as of February 2, 2026) is 15.8914 South African Rand (ZAR) to one U.S. dollar (USD).

1. Market Overview

After 11 years of negotiations, South Africa officially granted market access for U.S. blueberries on August 12, 2025. Although this agreement opens potential trade opportunities for U.S. producers, the demand for imported fresh blueberries is small. In the past ten years, South African production has grown to an estimated 38,900 metric tons (MT) in MY2025/26. Area planted to blueberries peaked in MY2022/23 and has leveled off as producers look for new markets. Import quantities reached a high of 1,200 MT in 2025, mainly coming from Zimbabwe during South Africa's off season and sometimes being diverted into South Africa's export volumes.

Blueberries are seen as a luxury product in South Africa, although prices have been falling as the domestic blueberry industry expanded. Industry marketing of blueberries as a health food has increased demand in higher-end supermarket chains. Domestic consumption of fresh blueberries is expected to continue growing steadily in the near future. Processed products containing blueberries may also gain more popularity as the blueberry's reputation as a health food grows.

Table 1: Opportunities and Challenges for U.S Blueberries in South Africa

Opportunities	Challenges
Genetics: Advancements in genetics and production techniques in the United States are known to enhance berry quality in South Africa. Investing in the export of new genetic varieties tailored to diverse weather conditions offers a strategic solution. This approach not only supports the U.S. blueberry market but also enables South African growers to capitalize on valuable market windows.	Logistical Infrastructure and Transportation: transporting U.S. blueberries to South Africa involves several interconnected challenges that require targeted solutions. Blueberries have a short life and sensitivity to temperature and humidity, and the South African market has inconsistent logistical infrastructure. Exporters will need to utilize advanced cold chain logistics, including refrigerated containers and temperature-controlled storage, to maintain fruit quality during transit modified atmosphere packaging (MAP) can also help extend shelf life.
Processed Products: There is an opportunity to capitalize on the blueberry's growing reputation as a tasty health food by exporting a broader range of processed blueberry products not currently available in the market.	Customs and Phytosanitary Regulations: Blueberries from states with controlled insects must comply with mitigation measures. Exporters must meet South Africa's import requirements, including phytosanitary certifications and pest control protocols.
	Competition from Local and Regional Growers: As demand grows for blueberries in South Africa, local producers offer sufficient supply.

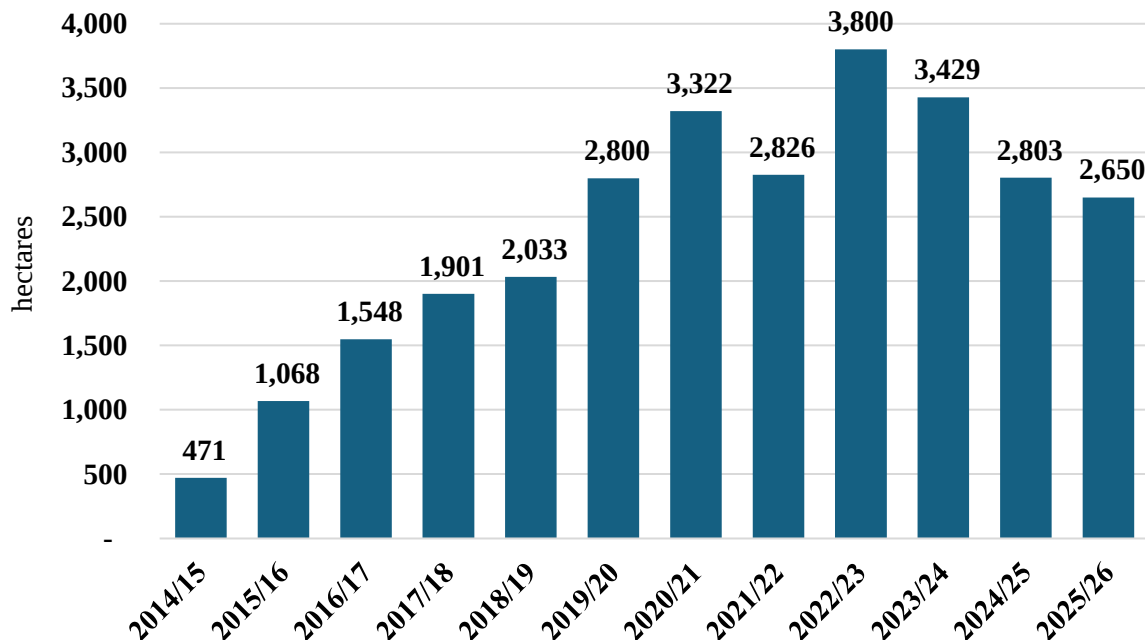
2. Domestic Production

2.1 Area Planted

The South African blueberry industry is relatively young but has experienced rapid growth, particularly between 2018 and 2020 (see Figure 1). The area under blueberry production increased from 471 hectares in 2014/15 to a peak of 3,800 hectares in MY 2022/23, before declining to 2,650 hectares in 2025/26.

Blueberry producers believe there is potential in the South African blueberry market to support 15,000 ha in production over the next 20 years; however, since MY 2023/24 the area under production has trended downward as growers face pressure from price volatility, rising input costs, high transport costs, and logistical disruptions. Industry stakeholders remain optimistic about recovery, as prices have reportedly rebounded from the lows recorded three seasons ago.

Figure 1: Area Planted to Blueberries in South Africa



Source: FAS Pretoria using BerriesZA data

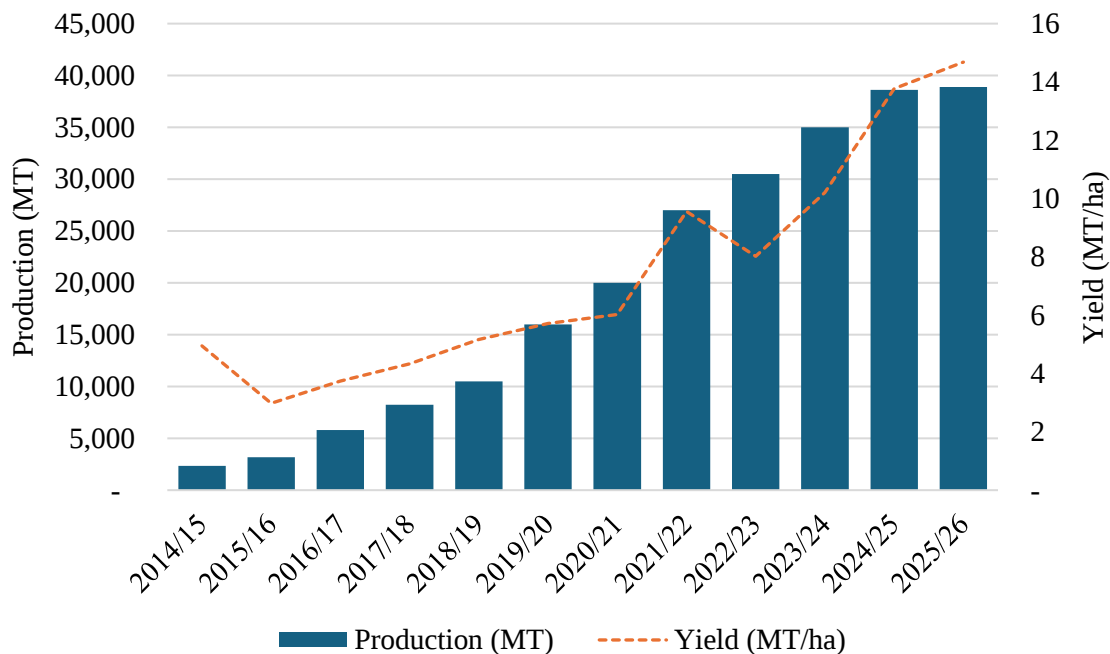
Blueberry production in South Africa spans a wide range of climates, from the cooler regions of the Western Cape to the subtropical areas of Limpopo and Mpumalanga. This diversity has driven the adoption of a variety of cultivars, bred for adaptability to different chill levels.

- **Western Cape:** South Africa's leading blueberry-producing region, accounting for approximately 60 percent of national production. Harvesting in this region peaks between September and January, with significant exports in October and November.
- **Limpopo:** the second-largest producing region, contributing 15 percent of national production. Its northern location extends South Africa's harvest season. The region has seen rapid expansion in recent years.
- **Northern Cape:** responsible for 10 percent of production, benefitting from growing conditions similar to those of the Western Cape.
- **Gauteng:** a smaller but commercially relevant player, with 8 percent of production.

2.2 Production

South African blueberry production has increased from less than 3,000 MT in MY 2014/15 to 38,900 MT in MY 2025/26. This production growth is supported by increases in planted areas, higher-yielding varieties, and favorable weather conditions. MY 2025/26 production improved by two percent due to favorable weather conditions. Although MY 2024/25 production was impacted by frost, particularly in the northern regions, production improved by 10 percent from the previous season due to productivity gains and favorable weather conditions elsewhere, especially in the Western Cape province.

Figure 2: South African Production of Blueberries



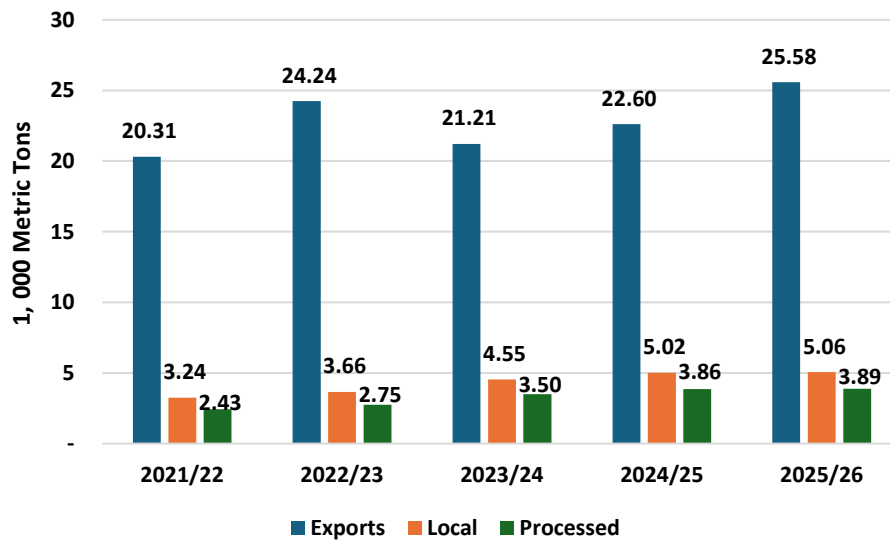
Source: *FAS Pretoria using BerriesZA and International Blueberry Organization data*

South Africa's blueberry harvest season typically runs from May to December, with export volumes peaking between October and November. The Western Cape dominates the later spring and summer harvest (October to January), while northern provinces, Limpopo and Mpumalanga, harvest from May September with the peak export season from July to August, producing fruits earlier destined for the Middle and Far East markets. The quality of South African blueberries is largely influenced by regional growing conditions and weather patterns.

For MY 2025/26, FAS Pretoria industry contacts reported South Africa's blueberry production has reached 38,900 MT with 25,000 MT to be exported to markets such as the EU and the UK.

The South African blueberry industry anticipates most increases in production to go to higher exports, projecting over 32,000 MT for MY 2027/28. In contrast, domestic consumption of fresh blueberries and processed blueberry products is expected to maintain very modest growth.

Figure 3: Usage of South African Blueberries (MY2021/22 – 2025/26)



Source: FAS/Pretoria using Industry Contact data

3. Consumption

3.1. Fresh Consumption

Despite the industry's heavy reliance on exports, the domestic market is showing promising growth. Blueberries remain a niche product in South Africa, often perceived as a luxury item. However, increasing health consciousness among consumers is driving higher local demand. This trend is further supported by competitive pricing, which has improved over the past two years, making blueberries more accessible to a broader segment of the population.

The expansion of production areas and increased blueberry output in South Africa have contributed to relatively affordable prices on supermarket shelves, including major retailers such as [Woolworths](#), [Checkers](#), [Spar](#), and [Pick 'n Pay](#). Between MY 2023/24 and MY 2024/25, local fresh consumption increased from 4,600 MT to 11,000 MT.

Table 2: Examples of Fresh Blueberries in South African Retail Stores

<i>Woolworths Fresh Blueberries</i>  <i>360g, Retail Price = \$5.95 (R104.18)</i>	<i>Pick 'n Pay Fresh Blueberries</i>  <i>125g, Retail Price = \$3.69 (R64.61)</i>
<i>Spar Fresh Blueberries</i>  <i>Retail Price = \$1.65 (R28.89)</i>	<i>Checkers Fresh Blueberries</i>  <i>200g, Retail Price = \$3.12 (R54.63)</i>

Picture Source: FAS/Pretoria retailer survey.

3.2. Processing

Blueberry processing in South Africa, like fresh consumption, remains a relatively small segment of the industry. Most is directed toward frozen fruit production, and the remainder goes to value-added products such as juice, confectionery, purees, and dairy items. The limited scale of processing is largely due to the industry's focus on fresh exports.

As domestic consumption of blueberries continues to grow, there is significant potential for expanding the availability of diverse processed blueberry products in South Africa. Currently, many value-added blueberry products, such as specialty snack, beverages, and baked goods are imported from the United States or remain unavailable in the local market. This presents an opportunity for U.S. exporters to introduce innovative processed blueberry products to meet emerging consumer demand in South Africa.

Table 3: Examples of Processed Blueberry Products in the South African Retail Market

<i>Blueberry Hibiscus Syrup, 500ml</i> <i>Woolworths</i>  <i>Retail Price = \$3.42 (R59.87)</i>	<i>Blueberry Cheesecake Ice Cream, 2l</i> <i>Pick 'n Pay</i>  <i>Retail Price = \$4.84 (R84.73)</i>
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Picture Source: FAS/Pretoria retailer survey.

4. Trade

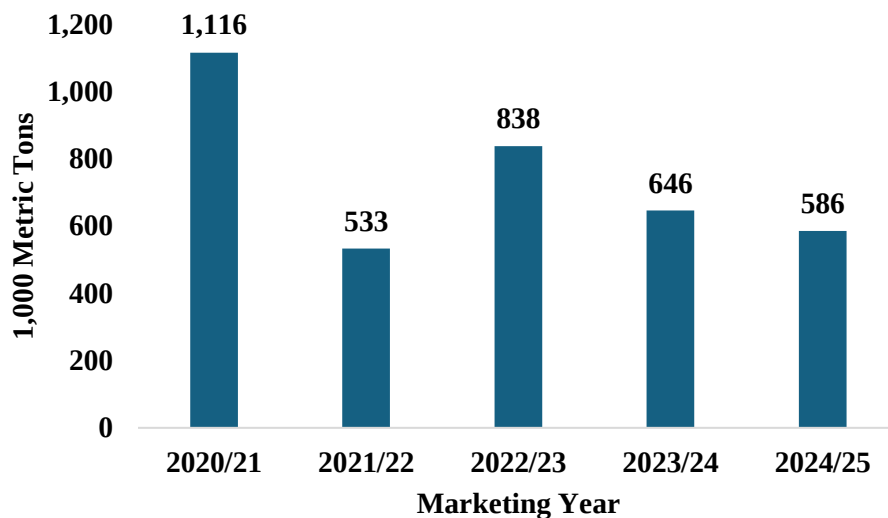
South Africa’s blueberry exports are experiencing significant growth, with traditional markets like the UK and EU remaining key destinations, while demand from emerging markets in the Middle East and Asia is rising. Although South Africa has become a major producer of blueberries, it relies on imports from neighboring countries like Zimbabwe and Zambia to address supply gaps. South African blueberry imports have declined over the past five years, as local producers are better able to meet domestic demand.

4.1. Imports

South Africa mostly imports blueberries from Zimbabwe, with a small amount coming from Zambia. The peak season for Zimbabwe blueberries is June/July, which allows year-round availability of blueberries in the South African market. Overall, berry import volumes have remained below 1,200 MT due to sufficient local supply. Additionally, FAS Pretoria reports that some companies import berries from their Zimbabwe-based operations to meet off-season demand for value-added products and for re-export purposes.

After 11 years of negotiations, on August 12, 2025, South Africa officially granted market access for U.S. blueberries for U.S. states that are free of fruit fly and agreed to mitigation measures with those states with fruit fly. Although the new access is an opportunity for U.S. producers, given the nature of production and consumption in South Africa, U.S. fresh blueberry exports to South Africa will likely remain very low.

Figure 4: Imports of Blueberries in South Africa

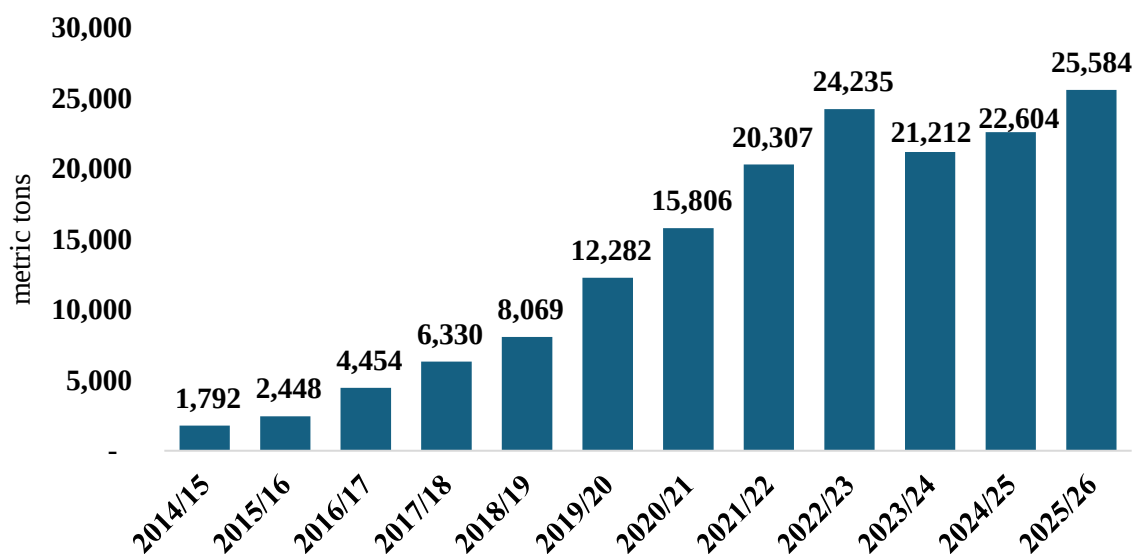


Source: FAS Pretoria using Trade Data Monitor, LLC.

4.2. Exports

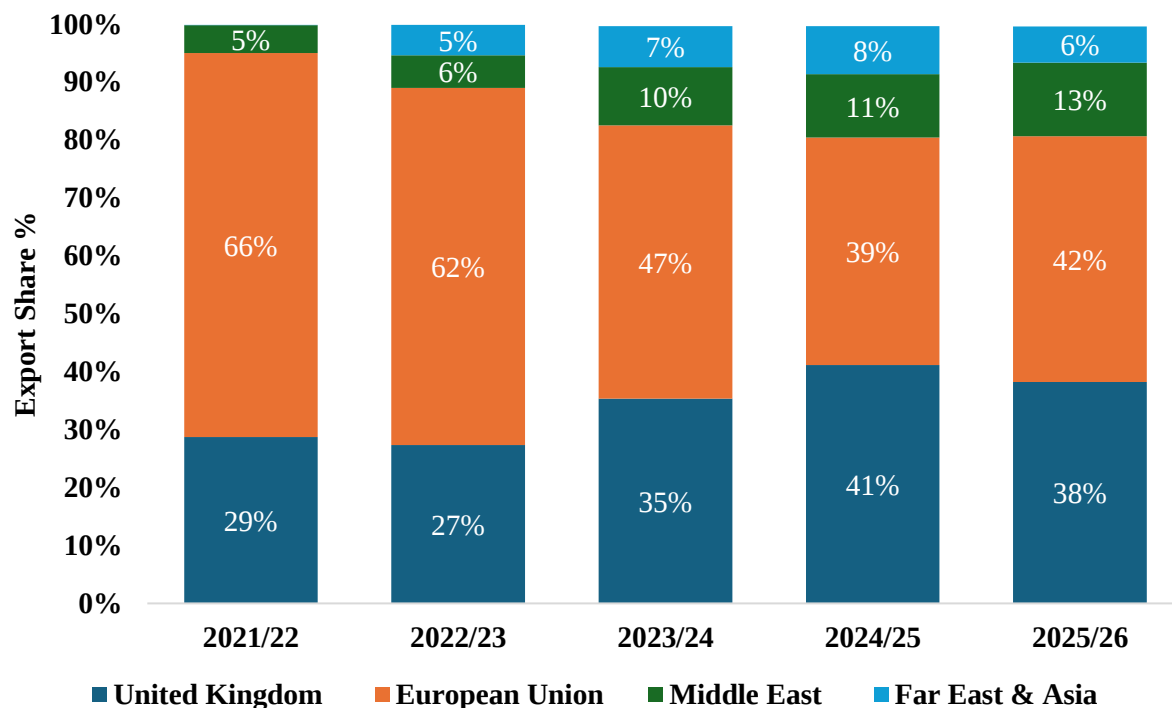
South Africa exported 25,584 MT of blueberries in MY 2025/26, representing 13 percent growth from the previous season and 5.6 percent growth from the previous peak in MY 22/23. This growth was supported by increased exportable production. FAS contacts report exports would have been higher except that port delays resulted in fruit being diverted to the domestic market. Europe remains the leading market for South African blueberries, accounting for an 80 percent share, while the Middle East and Asian markets have shown gradual growth in recent years.

Figure 5: South Africa's Blueberry Exports



Source: FAS Pretoria using BerriesZA data

Figure 6: Export Markets for South African Blueberries



Source: FAS Pretoria using Trade Data Monitor, LLC.

The blueberry industry reported that on average, the export price per season is about R90/kg, equivalent to U.S. \$5.14. The local market is on average rate of R60/kg, equivalent to U.S. \$3.42.

5. Regulations and Trade Policies

The Free Trade Agreements between Angola, Botswana, Comoros, Democratic Republic of Congo, Eswatini, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, United Republic of Tanzania, Zambia, and Zimbabwe benefitted from the Southern African Development Community (SADC) Free Trade Area (FTA) also help with cutting import costs. Information on countries that has Free Trade Agreement with South Africa on the Department of Trade, Industry and Competition (DTIC) website.

South African Import Regulations

Table 4 below provides links to useful resources and regulations pertaining to importing blueberries into South Africa. Post also publishes the [Food and Agricultural Import Regulations and Standards \(FAIRS\)](#), and the [FAIRS Export Certificate Report](#), to assist U.S. exporters with the relevant regulations, certificates, permits, and procedures. The FAIRS reports are publicly available for download on the [GAIN](#) system.

Table 4: South African Import Regulations and Procedures

Regulation/ Procedures	Internet Link
Final Phytosanitary workplan for Importation of fresh Blueberry from USA Western States into SA August 2025	https://www.nda.gov.za/images/Branches/AgricProducHealthFoodSafety/PlantProductionHealth/PlantHealth/importing-into-sa/Import-Protocols/2025/final-phytosanitary-workplan-for-importation-of-fresh-blueberry-from-usa-western-states-into-sa-augu_p96407.pdf
Final Phytosanitary workplan for the importation of Fresh Blueberry from USA Eastern States into SA August 2025	https://www.nda.gov.za/images/Branches/AgricProducHealthFoodSafety/PlantProductionHealth/PlantHealth/importing-into-sa/Import-Protocols/2025/final-phytosanitary-workplan-for-the-importation-of-fresh-blueberry-from-usa-eastern-states-into-sa-_p97366.pdf
Regulations Relating to the Grading, Packing and Marking of Fresh Fruits Intended for Sale in the Republic of South Africa	https://www.gov.za/documents/notices/agricultural-product-standards-act-regulations-grading-packing-and-marking-fresh
Procedure for Importing into South Africa	https://www.nda.gov.za/component/content/article/299-import-authorisation?catid=19&Itemid=437
Maximum Residue Limits (MRLs)	https://www.nda.gov.za/index.php/publication/538-maximum-residue-limits-mrls

Source: Department of Agriculture, Republic of South Africa

(a) South African Import Requirements for Blueberry Propagation material

The United States can export blueberry seeds for planting and other propagation material into South Africa but importing these articles is a highly regulated process. Phytosanitary import conditions are available and vary greatly for the specific Blueberries plant material or part to be imported from the United States, e.g. seeds for planting, propagation material (cutting), in vitro cultures of plant material, rooted plants etc.

A copy of an Import Permit (applied by an importer and issued by South African Department of Agriculture) and an original Phytosanitary Certificate (issued USDA-APHIS) must accompany all shipments authorized from the US into SA; the Additional Declarations on the Phytosanitary Certificate will certify that the plant material has been inspected and is free from pests and diseases indicated on the Import Permit and has a quarantine label affixed to the parcel/shipment. Upon shipment arrival in SA, the articles in the shipping container(s) are subject to inspection by officials Border Management Agency.

The importer is responsible for customs clearance. The inspectors will release the shipment if free of exotic pests, noxious weeds, soil and other prohibited matter to the post-entry quarantine facility which is based at the Plant Quarantine Station, in Stellenbosch, Western Cape; and they will be grown at this government owned facility under state supervision for a set period before being released to the importer. Lastly it is important to note that the importer has to check the

cultivars if registered on the National Variety List or Plant Breeder's Rights list as the Phytosanitary Import Permit does not exempt the holder from the provisions of any other Act, ordinance or Agreement, e.g. Genetically Modified Organisms Act, 1997 (Act No 15 of 1997).

Additional Useful Resources

- American Chamber of Commerce in South Africa: www.amcham.co.za
- U.S. Commercial Service: <https://www.trade.gov/south-africa>
- U.S. International Trade Administration – South Africa Country Commercial Guide: <https://www.trade.gov/knowledge-product/exporting-south-africa-market-overview>
- The Franchise Association of South Africa: <https://www.fasa.co.za>
- The Restaurant Association of South Africa: <http://www.restaurant.org.za/>
- South African Tourism: <https://www.tourism.gov.za>
- The Federated Hospitality Association of South Africa (FEDHASA): <https://fedhasa.co.za>
- The Tourism Grading Council of South Africa: <https://www.tourismgrading.co.za/>

Berries ZA

Berries ZA was established in 2011 to create a structured platform that addresses common industry issues for the mutual benefit of its members. Through the formation of Berries ZA, the association focuses on collective strategic objectives to create a more prosperous local industry for producers and the community as a whole. For more information on their members, contact details and services they provide can be found on the following website link, <https://www.berriesza.co.za>

Attachments:

No Attachments.