

2010

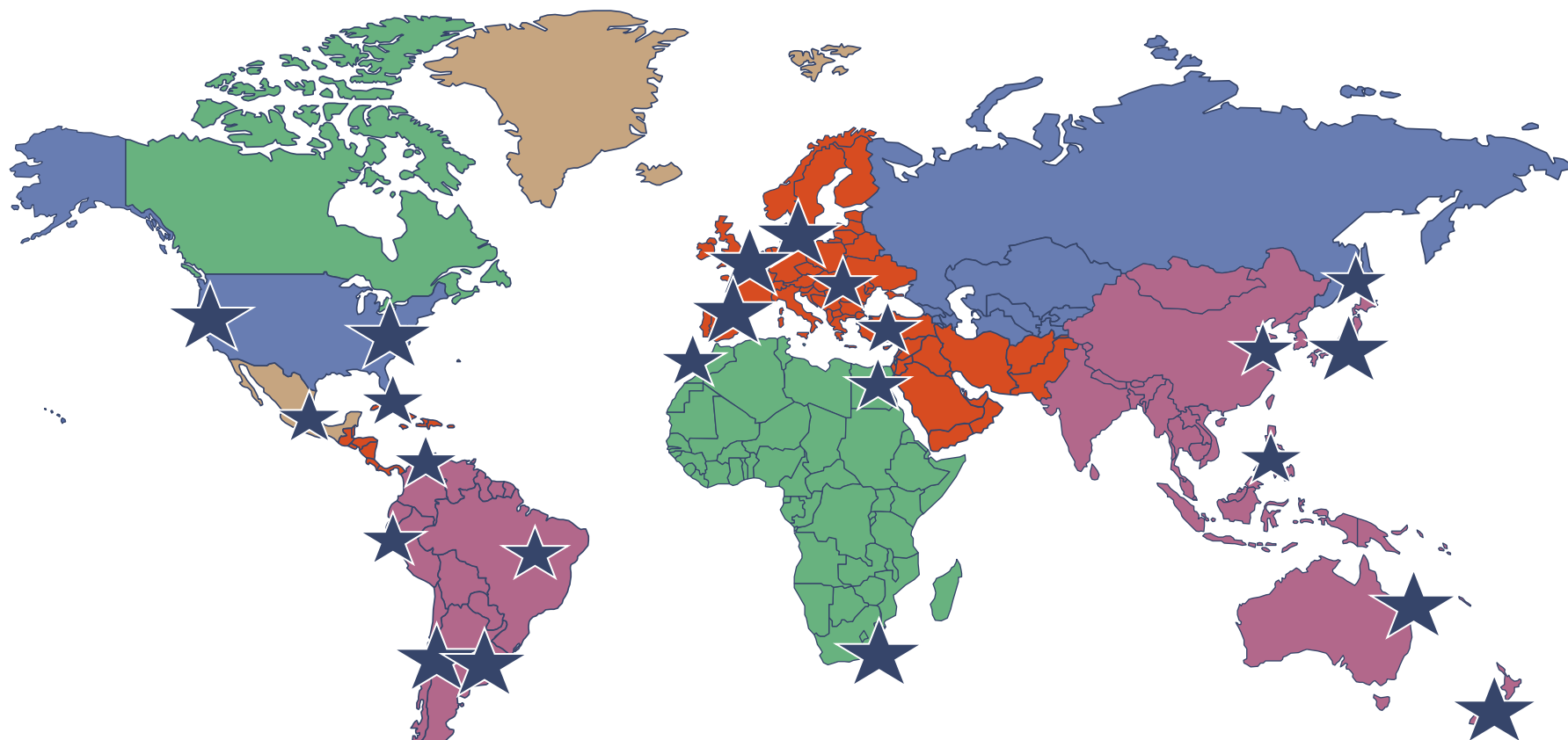
World Blueberry Acreage & Production

Cort Brazelton

Brazelton Ag Consulting

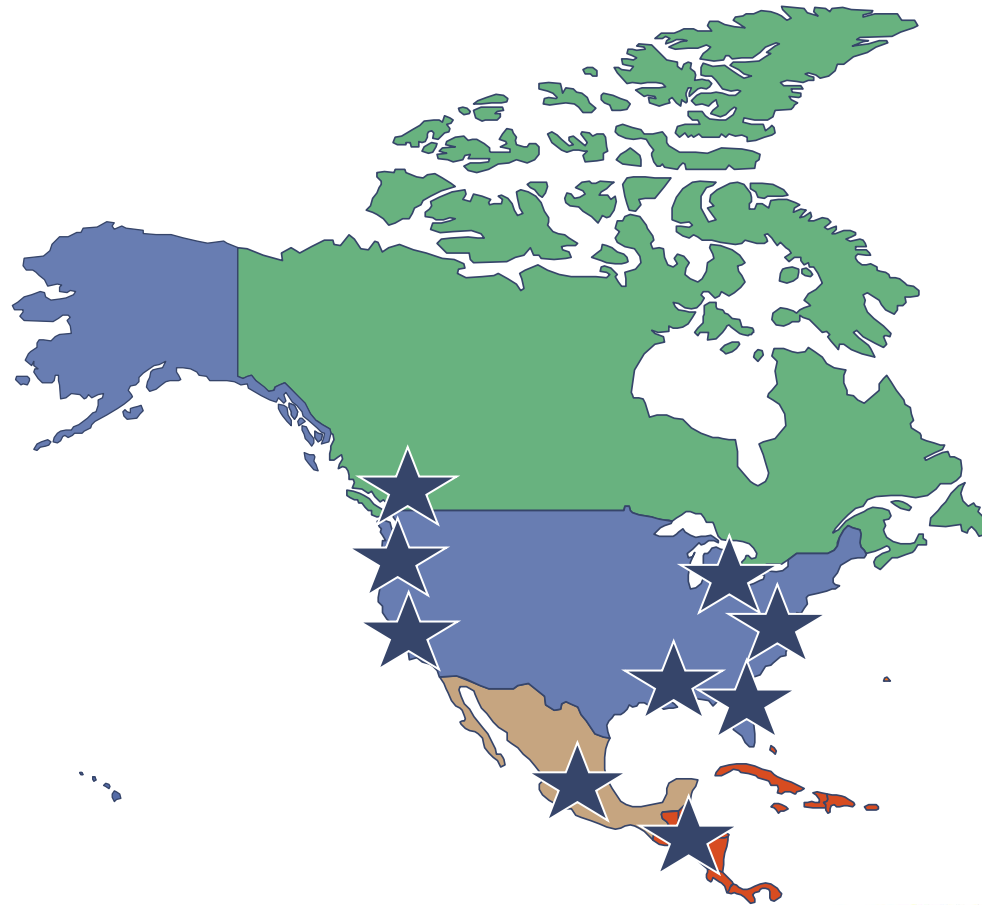


Where Have They Been ...



And they keep on going...

North America



2010 North American Highbush Production

Western Region

	2008 Million Lbs.			2010 Million Lbs.		
	Fresh	Process	Total	Fresh	Process	Total
British Columbia	40.00	35.00	75.00	56.00	34.00	90.00
Washington	6.50	23.50	30.00	12.00	30.00	42.00
Oregon	18.00	26.60	44.60	25.80	27.50	53.30
California	13.00	1.00	14.00	27.00	1.00	28.00
TOTAL	77.50	86.10	163.60	120.80	92.50	213.30
	↑	↑	↑	↑	↑	↑

2010 North American Highbush Production

Western Region

	2005 Acres	2007 Acres	2008 Acres	2010 Acres	2010 Million Lbs.		
					Fresh	Process	Total
British Columbia	13,000	17,500	18,300	21,020	56.00	34.00	90.00
Washington	2,815	3,982	5,678	8,820	12.00	30.00	42.00
Oregon	4,410	5,516	6,234	7,458	25.80	27.50	53.30
California	2,370	3,949	5,120	5,790	27.00	1.00	28.00
TOTAL	22,595	30,947	35,332	43,088	120.80	92.50	213.30

2010 North American Highbush Summary

Western Region

	2010 Acres	Timing	Total Prod
British Columbia	21,020	Jul-Sep	90.0
Washington	8,820	Jun-Sep	42.0
Oregon	7,458	Jul-Sep	53.3
California	5,790	Mar-Jul	28.0
TOTAL	43,088	Mar-Sep	213.3

NORTHERN

- Duke
- Draper
- Bluecrop
- Liberty
- Legacy
- Elliott
- Aurora

SOUTHERN

- Emerald
- Jewell
- Star
- Springhigh
- Snowchaser

2010 North American Highbush Production

Midwestern Region

	2008 Million Lbs.			2010 Million Lbs.		
	Fresh	Process	Total	Fresh	Process	Total
Michigan	45.00	65.00	110.00	49.50	49.50	99.00
Indiana	2.30	1.50	3.80	2.70	1.30	4.00
Others	0.30	0.00	0.30	1.90	0.00	1.90
TOTAL	47.60	66.50	114.10	54.10	50.80	104.90



2010 North American Highbush Production

Midwestern Region

	2005 Acres	2007 Acres	2008 Acres	2010 Acres	2010 Million Lbs.		
					Fresh	Process	Total
Michigan	18,500	19,300	21,200	22,750	49.50	49.50	99.00
Indiana	850	850	900	950	2.70	1.30	4.00
Others	1,055	1,275	1,300	1,500	1.90	0.00	1.90
TOTAL	20,405	21,425	23,400	25,200	54.10	50.80	104.90

2010 North American Highbush Summary

Midwestern Region

	2010 Acres	Timing	Total Prod
Michigan	22,750	Jul-Sep	99.0
Indiana	950	Jul-Sep	4.0
Others	1,500	Jul-Sep	1.9
TOTAL	25,200	Jul-Sep	104.9

NORTHERN

- *Jersey*
- *Bluecrop*
- *Elliott*
- *Duke*

2010 North American Highbush Production

Northeast Region

	<i>2008 Million Lbs.</i>			<i>2010 Million Lbs.</i>		
	Fresh	Process	Total	Fresh	Process	Total
New Jersey	46.00	8.00	54.00	32.00	8.00	40.00
New York	2.20	0.10	2.30	2.20	0.10	2.30
E. Canada	3.00	0.10	3.10	3.80	0.10	3.90
Nova Scotia	1.00	0.25	1.25	1.00	0.00	1.00
TOTAL	52.20	8.45	60.65	39.00	8.20	47.20



2010 North American Highbush Production

Northeast Region

	2005 Acres	2007 Acres	2008 Acres	2010 Acres	2010 Million Lbs.		
					Fresh	Process	Total
New Jersey	7,500	7,900	7,960	8,120	32.00	8.00	40.00
New York	1,000	1,050	1,100	1,200	2.20	0.10	2.30
E. Canada	1,230	1,150	1,200	1,260	3.80	0.10	3.90
Nova Scotia	0	300	300	300	1.00	0.00	1.00
TOTAL	9,730	10,400	10,560	10,880	39.00	8.20	47.20

2010 North American Highbush Summary

Northeast Region

	2010 Acres	Timing	Total Prod
New Jersey	8,120	Jun-Aug	40.0
New York	1,200	Jul-Aug	2.3
E. Canada	1,260	Jul-Sep	3.9
Nova Scotia	300	Aug-Oct	1.0
TOTAL	10,880	Jun-Sep	47.2

NORTHERN

- *Duke*
- *Bluecrop*
- *Elliott*

2010 North American Highbush Production

Southern Region

	2008 Million Lbs.			2010 Million Lbs.		
	Fresh	Process	Total	Fresh	Process	Total
Florida	9.00	0.00	9.00	15.00	0.80	15.80
Arkansas	1.50	0.00	1.50	0.50	0.00	0.50
Miss./Louisiana	1.90	1.80	3.70	3.00	4.50	7.50
Georgia	16.00	15.00	31.00	36.00	20.00	56.00
North Carolina	20.00	8.50	28.50	27.50	11.50	39.00
Texas	1.50	0.00	1.50	1.50	0.00	1.50
Others	0.00	0.00	0.00	0.60	0.00	0.60
TOTAL	49.90	25.30	75.20	84.10	36.80	120.90



2010 North American Highbush Production

Southern Region

	2005 Acres	2007 Acres	2008 Acres	2010 Acres	2010 Million Lbs.		
					Fresh	Process	Total
Florida	1,800	3,200	3,450	3,950	15.00	0.80	15.80
Arkansas	350	530	550	550	0.50	0.00	0.50
Miss./Louisiana	2,140	2,500	3,300	3,850	3.00	4.50	7.50
Georgia	7,500	9,120	11,000	12,800	36.00	20.00	56.00
North Carolina	5,500	6,000	6,200	6,800	27.50	11.50	39.00
Texas	875	950	1,000	1,050	1.50	0.00	1.50
Others	0	0	0	450	0.60	0.00	0.60
TOTAL	18,165	22,300	25,500	29,450	84.10	36.80	120.90

2010 North American Highbush Summary

Southern Region

	2010 Acres	Timing	Total Prod
Florida	3,950	Mar-May	15.8
Arkansas	550	May-Aug	0.5
Miss./Louisiana	3,850	May-Aug	7.5
Georgia	12,800	Apr-Aug	56.0
North Carolina	6,800	May-Aug	39.0
Texas	1,050	May-Jul	1.5
Others	450	0	0.6
TOTAL	29,450	Mar-Aug	120.9

NORTHERN

- *Duke*

SOUTHERN

- *Emerald*
- *Jewell*
- *Star*
- *Primadonna*
- *"V1"*
- *Croatan*
- *Reville*
- *Oneal*

RABBITEYE

- *Tifblue*
- *Brightwell*
- *Powderblue*
- *Premier*
- *Climax*
- *Columbus*

2010 North American Highbush Production

Mexico & Central America Region

	2008 Million Lbs.			2010 Million Lbs.		
	Fresh	Process	Total	Fresh	Process	Total
Northern Mexico	0.50	0.00	0.50	0.75	0.00	0.75
Southern Mexico	1.60	0.00	1.60	4.20	0.00	4.20
Guatemala	0.10	0.00	0.10	0.05	0.00	0.05
TOTAL	2.20	0.00	2.20	5.00	0.00	5.00



2010 North American Highbush Production

Mexico & Central America Region

	2005 Acres	2007 Acres	2008 Acres	2010 Acres	2010 Million Lbs.		
					Fresh	Process	Total
Northern Mexico	60	180	260	295	0.75	0.00	0.75
Southern Mexico	120	350	530	1,350	4.20	0.00	4.20
Guatemala	0	15	25	27	0.05	0.00	0.05
TOTAL	180	545	815	1,672	5.00	0.00	5.00

2010 North American Highbush Summary

Mexico & Central America Region

	2010 Acres	Timing	Total Prod
Northern Mexico	295	Feb-Jun	0.8
Southern Mexico	1,350	Sep-Apr	4.2
Guatemala	27	Sep-Apr	0.1
TOTAL	1,672	Sep-May	5.0

SOUTHERN

- *Biloxi*
- *Misty*
- *Sharpblue*
- *UF Varieties*
- *Private Programs*

2010 North American Highbush Production

North America Region

	2008 Million Lbs.			2010 Million Lbs.		
	Fresh	Process	Total	Fresh	Process	Total
Western	77.50	86.10	163.60	120.80	92.50	213.30
Midwest	47.60	66.50	114.10	54.10	50.80	104.90
Northeast	52.20	8.45	60.65	39.00	8.20	47.20
Southern	49.90	25.30	75.20	84.10	36.80	120.90
Mexico & Cen. Am	2.20	0.00	2.20	5.00	0.00	5.00
TOTAL	229.40	186.35	415.75	303.00	188.30	491.30
	↑	↑	↑	↑	↑	↑

2010 North American Highbush Production

North America Region

	2005 Acres	2007 Acres	2008 Acres	2010 Acres	2010 Million Lbs.		
					Fresh	Process	Total
Western	22,595	30,947	35,332	43,088	120.80	92.50	213.30
Midwest	20,405	21,425	23,400	25,200	54.10	50.80	104.90
Northeast	9,730	10,400	10,560	10,880	39.00	8.20	47.20
Southern	18,165	22,300	25,500	29,450	84.10	36.80	120.90
Mexico & Cen. Am.	180	545	815	1,672	5.00	0.00	5.00
TOTAL	71,075	85,617	95,607	110,290	303.00	188.30	491.30

2010 North American Highbush Summary

North America Region

	2010 Acres	Timing	Total Prod
Western	43,088	Mar-Sep	213.3
Midwest	25,200	Jul-Sep	104.9
Northeast	10,880	Jun-Sep	47.2
Southern	29,450	Mar-Aug	120.9
Mexico & Cen. Am.	1,672	Sep-May	5.0
TOTAL	110,290	Mar-Oct	491.3

NORTHERN

- Duke
- Bluecrop
- Elliott
- Jersey
- Draper

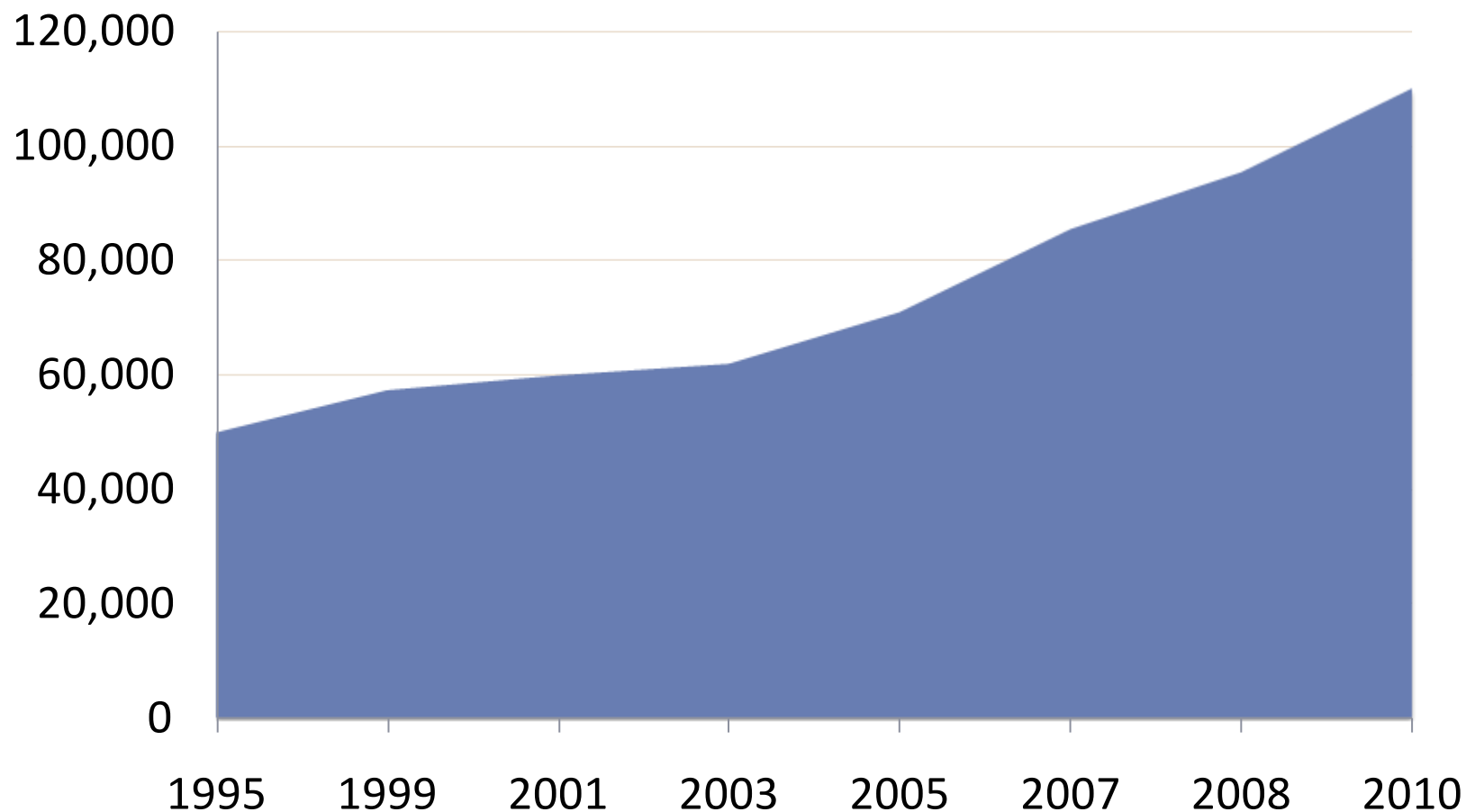
SOUTHERN

- Oneal
- Star
- Emerald
- Jewel
- Primadonna

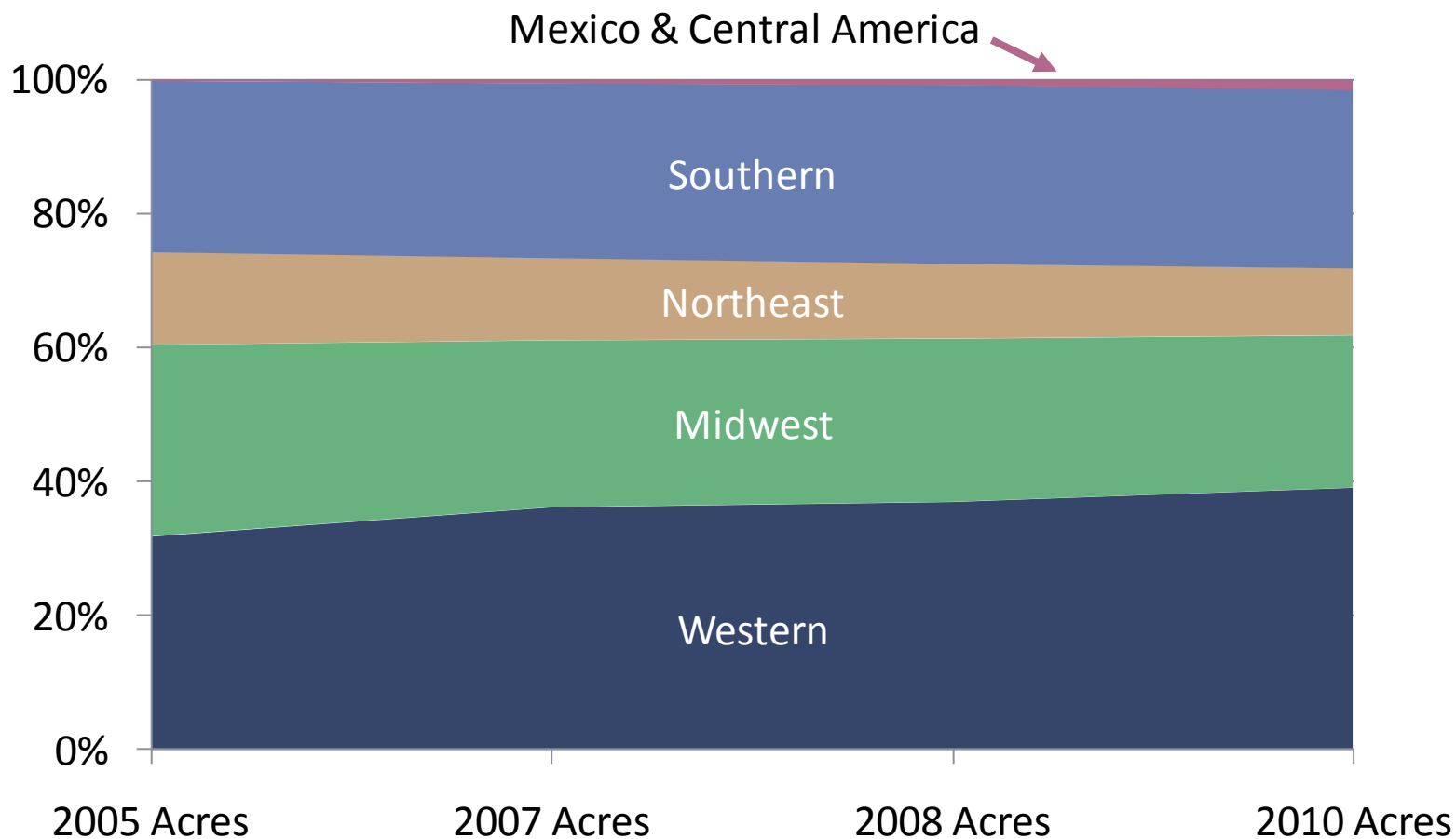
RABBITEYE

- Brightwell
- Tifblue
- Powderblue
- Climax

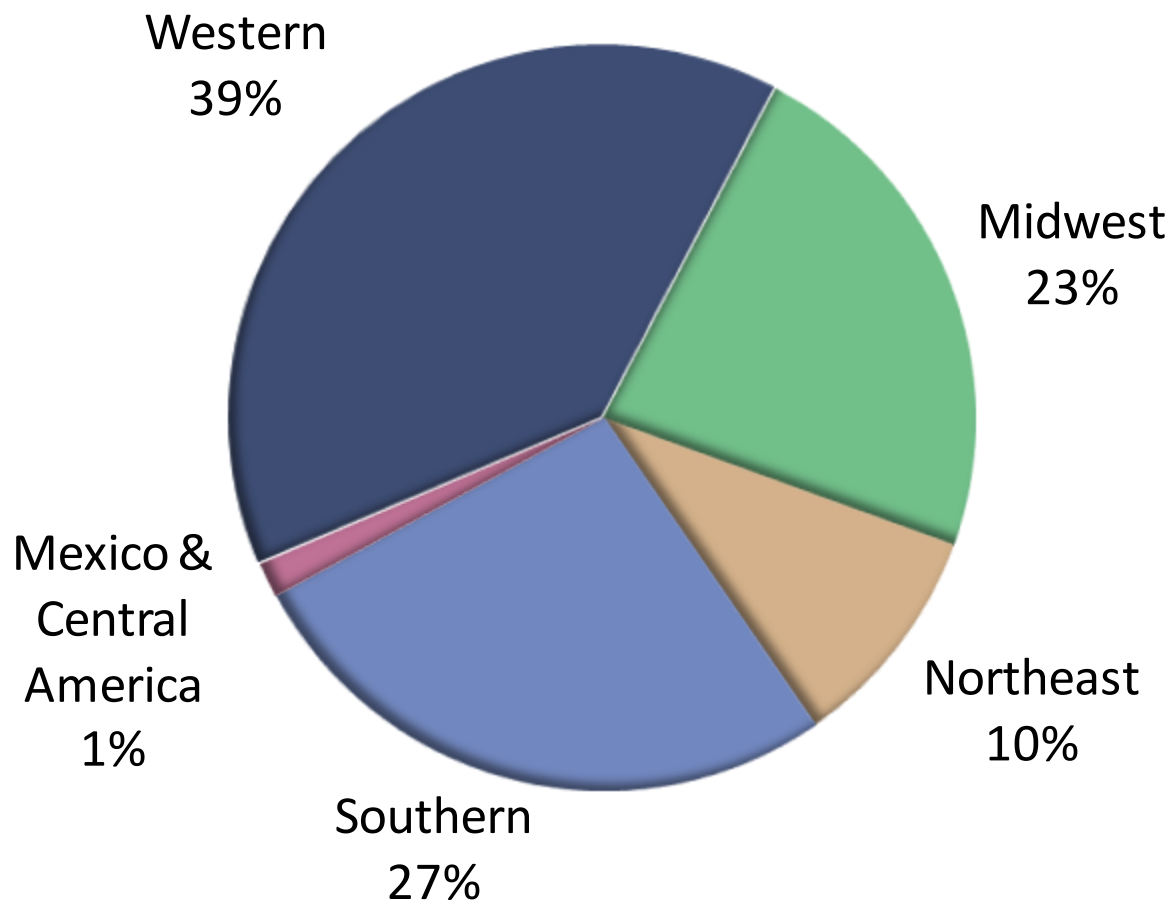
North American Acreage Increases 1995 - 2010



NA Region Acreage Increases 2005 - 2010

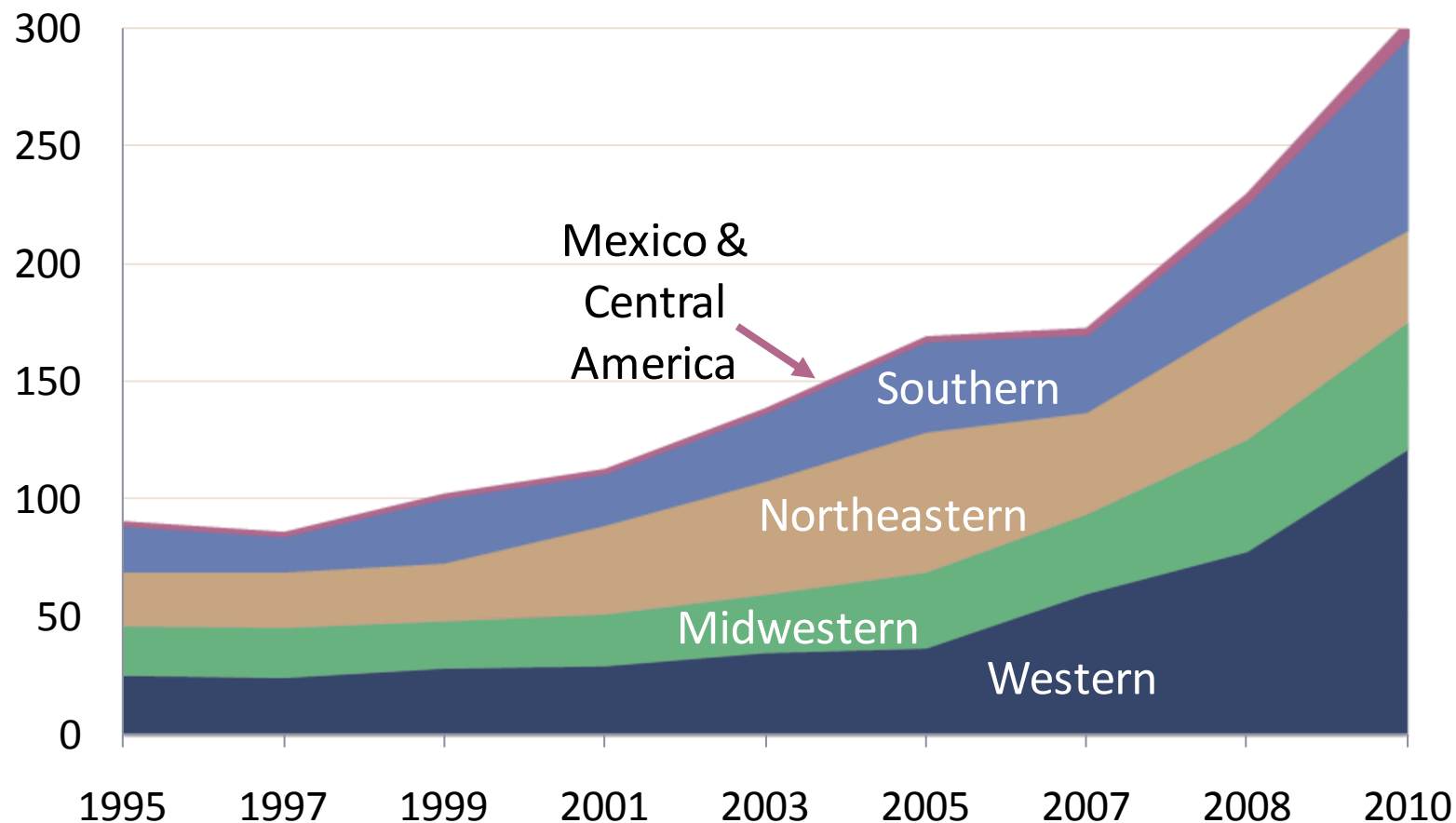


2010 North American Acreage Distribution



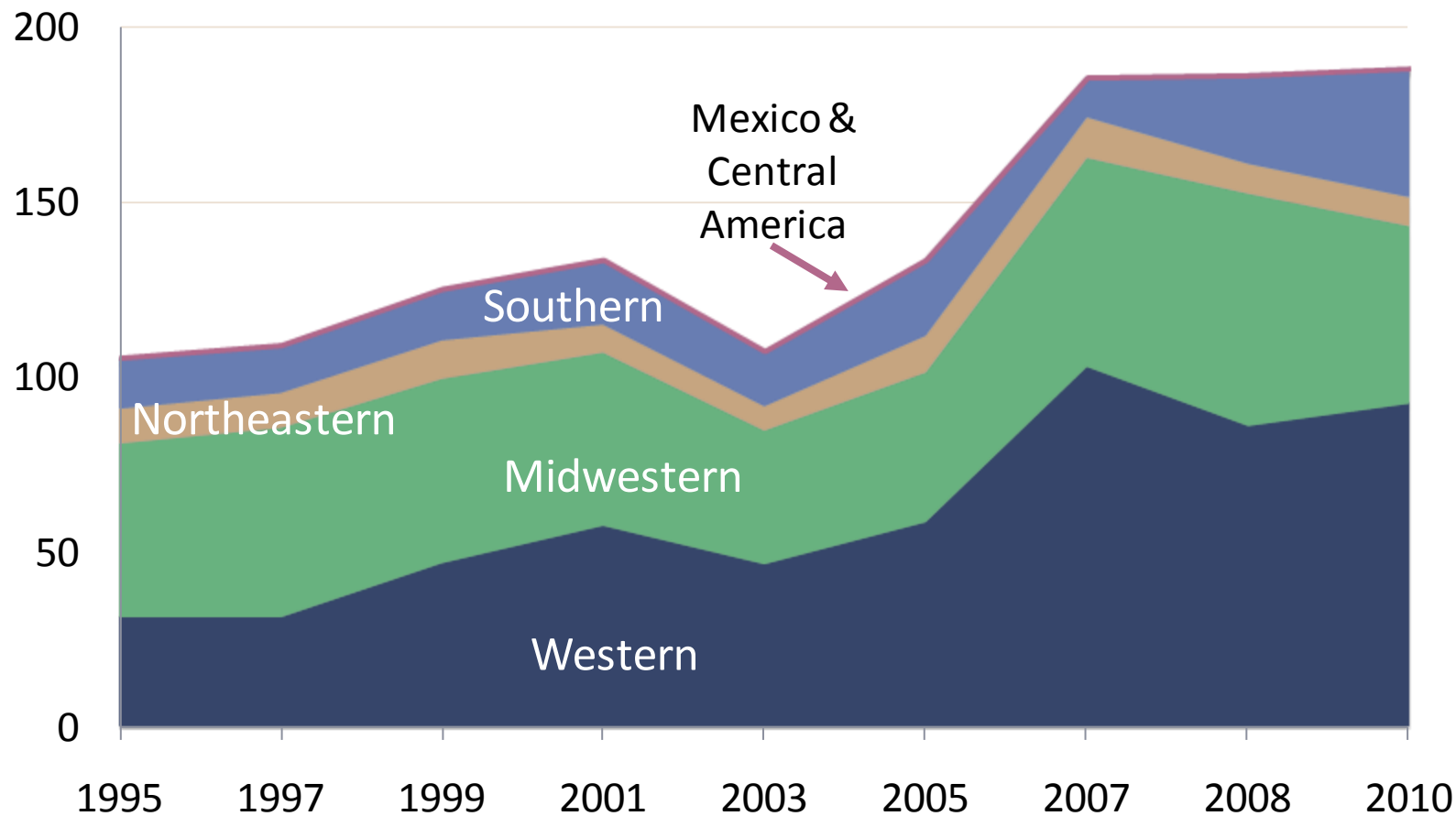
NA Fresh Production by Region

1995 -2010



NA Processed Production by Region

1995 -2010



North America Overview

West	<ul style="list-style-type: none">• Slower growth in PNW, though continuing, driven by process and fresh demand – both domestic and exports• California planting growth miniscule, production still increasing – facing competitive challenges
Midwest	<ul style="list-style-type: none">• Continues to grow, strong fresh and process position• New growing techniques increasing productivity in some farms
South	<ul style="list-style-type: none">• Significant growth, both in acreage and production, especially in Georgia• Some concerns about long term competitiveness of some fields
Northeast	<ul style="list-style-type: none">• (NJ) Increased replanting, market proximity an advantage, 2010 a tough year due to weather and labor
Mexico & Central America	<ul style="list-style-type: none">• Mexico likely to become a player in next decade• With rapid growth may come challenges

North America Overview





Domestic Market	<ul style="list-style-type: none">• Continues to grow, fresh movement considerable, new opportunities for growth in process
Export Markets	<ul style="list-style-type: none">• Significant export opportunities to Pacific Rim and beyond
Process	<ul style="list-style-type: none">• Heavy fresh diversion, light wild crop, significant inventory movement and other factors contributed to rebound in process prices in 2010
Economics, Policy, Technology	<ul style="list-style-type: none">• Labor an increasing concern• Considerable interest in machine harvest for fresh
North America - General	<ul style="list-style-type: none">• Room for continued growth• Competitive advantages for operations of scale• Rapid growth accompanied by tendencies to underperform

South America



2010 South American Highbush Production

	2008 Million Lbs.			2010 Million Lbs.		
	Fresh	Process	Total	Fresh	Process	Total
Chile	68.14	19.40	87.54	109.51	14.00	123.51
Argentina	22.20	3.00	25.20	24.64	2.00	26.64
Uruguay	1.60	0.60	2.20	2.68	0.33	3.01
Peru	0.03	0.01	0.04	0.03	0.00	0.03
Brazil	0.12	0.01	0.13	0.20	0.00	0.20
Colombia	0.01	0.01	0.02	0.01	0.00	0.01
TOTAL	92.10	23.03	115.13	137.07	16.33	153.40

2010 South American Highbush Production

	2005 Acres	2007 Acres	2008 Acres	09/10 Acres	2010 Million Lbs.		
					Fresh	Process	Total
Chile	11,120	22,700	26,908	32,250	109.51	14.00	123.51
Argentina	6,919	9,400	10,900	9,500	24.64	2.00	26.64
Uruguay	0	1,450	1,620	1,850	2.68	0.33	3.01
Peru	0	40	60	80	0.03	0.00	0.03
Brazil	0	50	200	300	0.20	0.00	0.20
Colombia	0	10	15	20	0.01	0.00	0.01
TOTAL	18,039	33,650	39,703	44,000	137.07	16.33	153.40

2010 South American Highbush Summary

	09/10 Acres	Timing	Total Prod
Chile	32,250	Nov-Mar	123.5
Argentina	9,500	Sep-Jan	26.6
Uruguay	1,850	Oct-Jan	3.0
Peru	80	Aug-Jan	0.0
Brazil	300	Sep-Jan	0.2
Colombia	20	Jul-Feb	0.0
TOTAL	44,000	Sep-Apr	153.4

NORTHERN

- *Duke*
- *Bluecrop*
- *Elliott*
- *Brigitta*
- *Legacy*

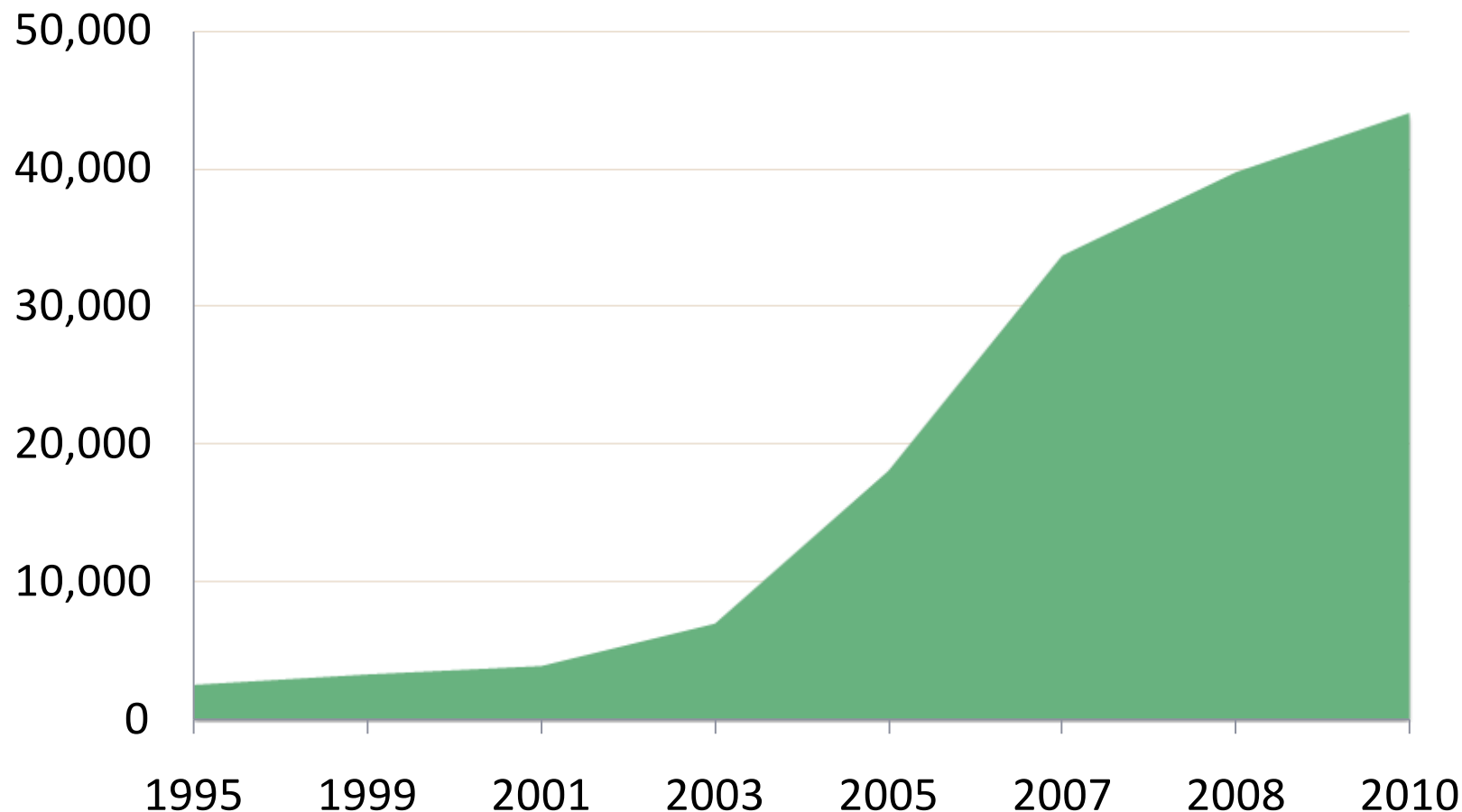
SOUTHERN

- *Oneal*
- *Star*
- *Jewel*
- *Emerald*
- *Misty*

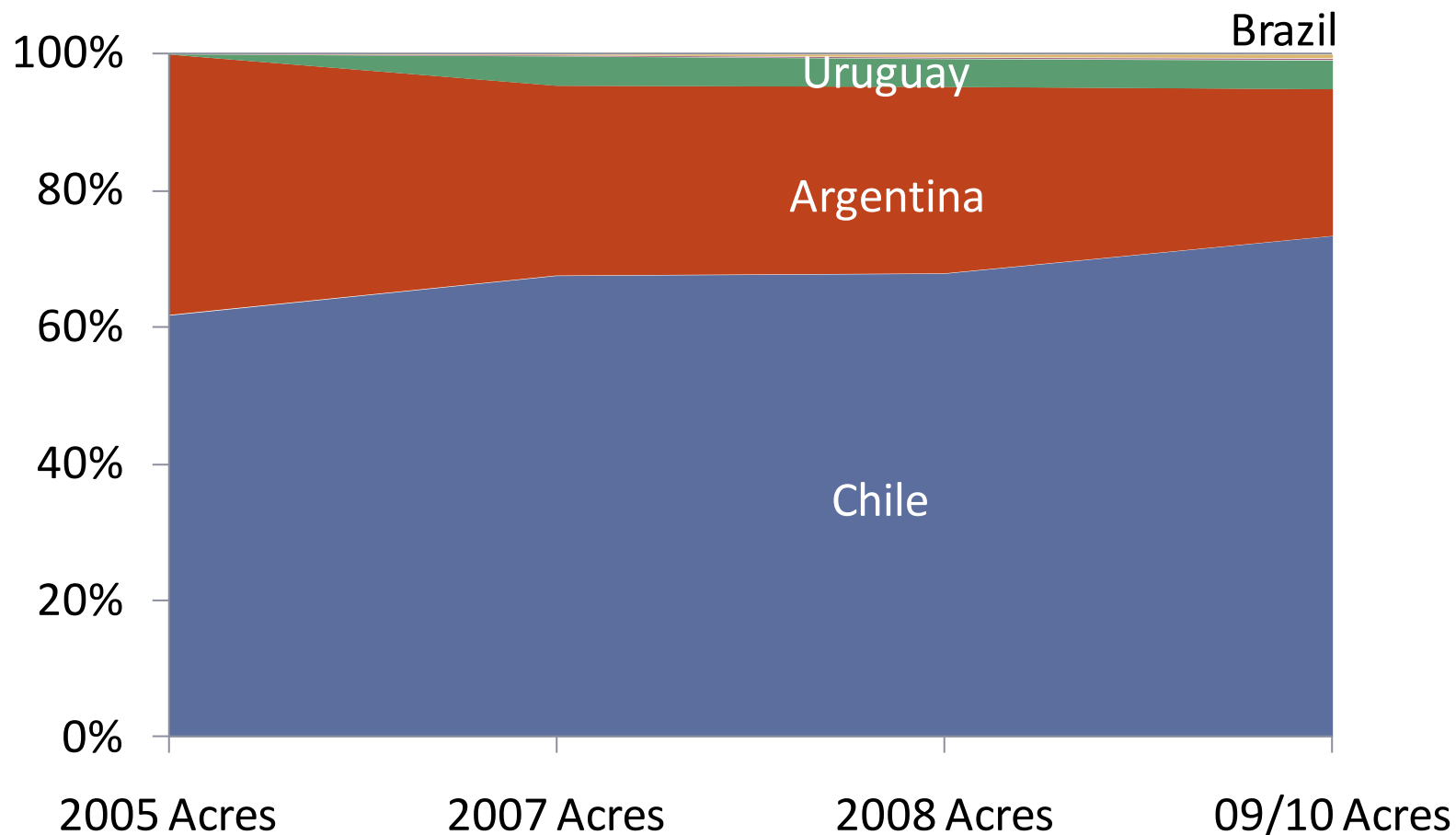
RABBITEYE

- *Brightwell*
- *Tifblue*
- *Centurion*
- *Ochlockonee*

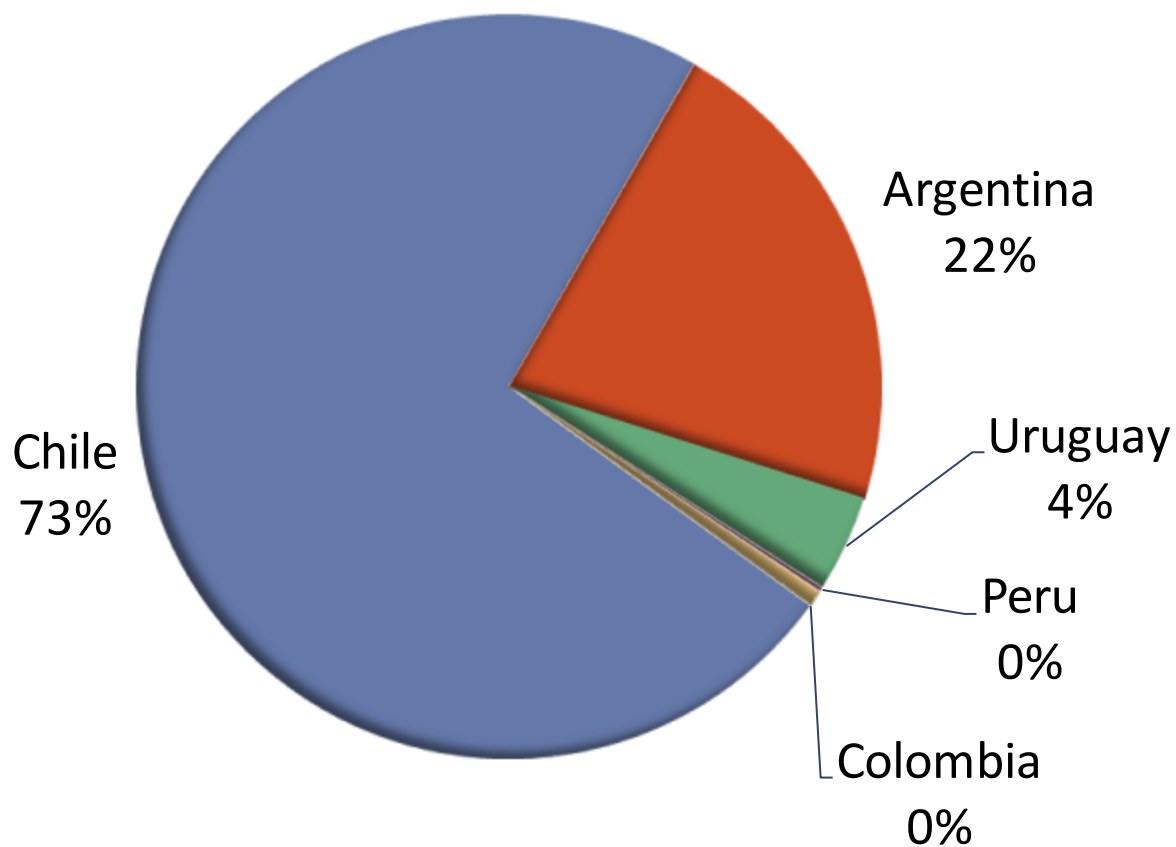
South America Acreage Increases 1995 - 2010



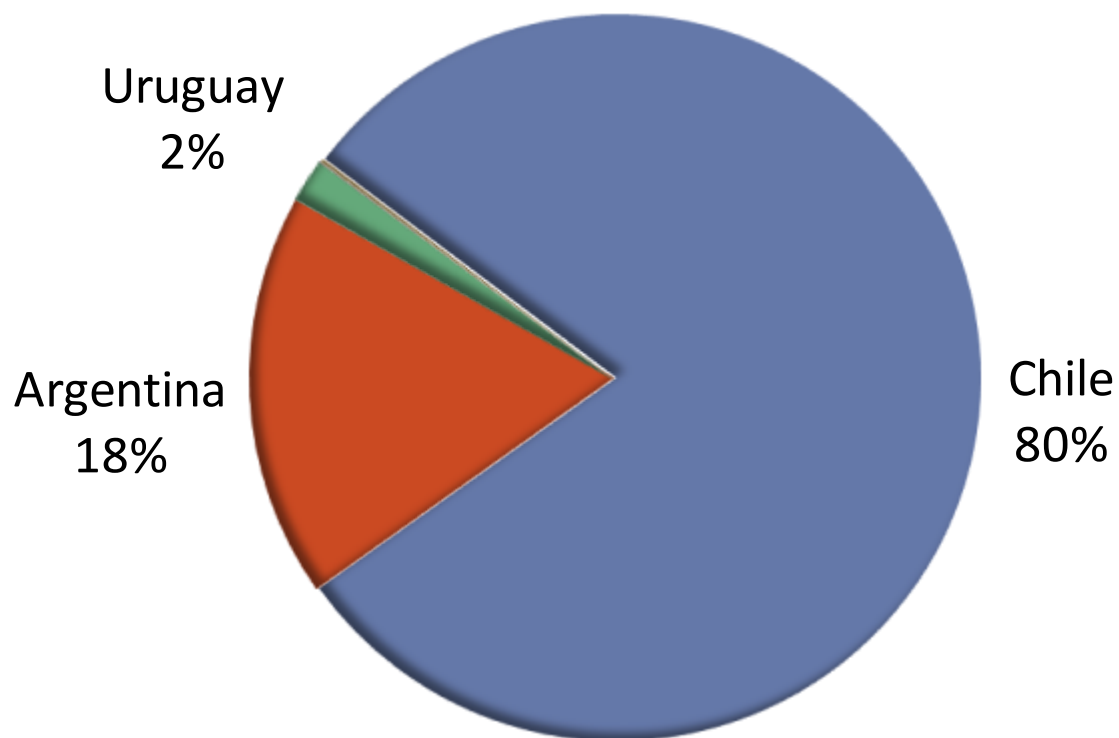
South America Acreage Increases 2005 - 2010



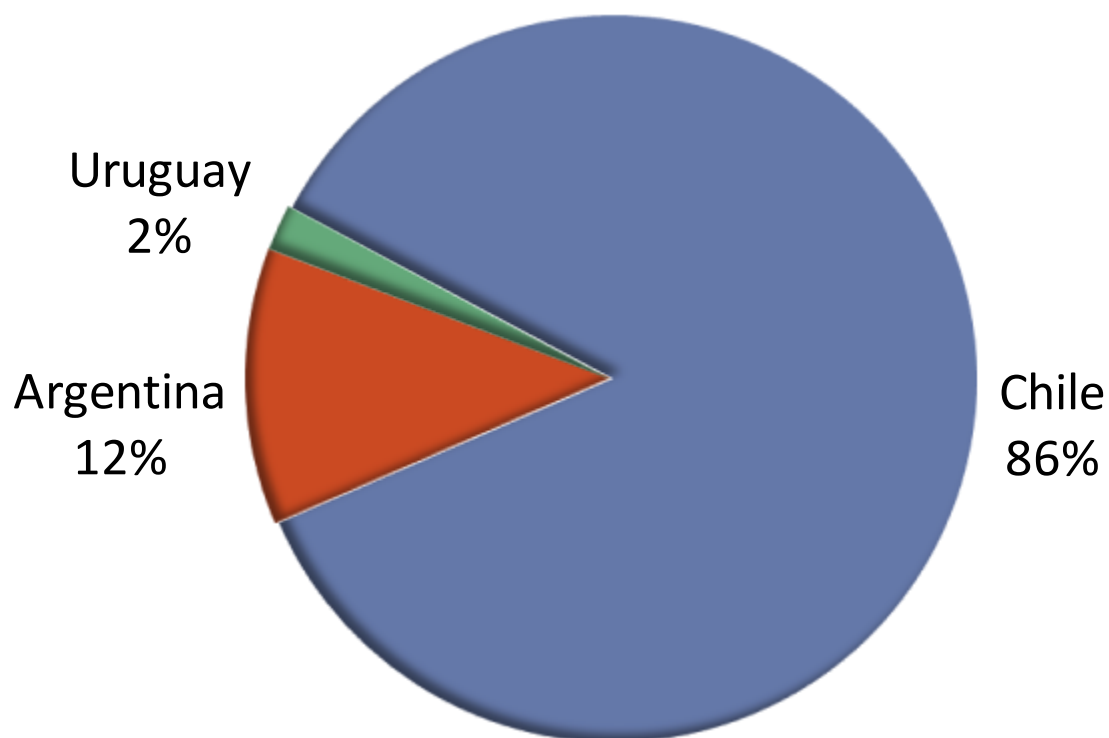
2010 South America Acreage Distribution



2009/10 South America Fresh Production



2009/10 South America Processed Production



South America Overview

Continent	<ul style="list-style-type: none">• Long term opportunities to supply growing demand throughout northern hemisphere• Rapid growth has led to underperformance in many regions
Chile	<ul style="list-style-type: none">• Larger operators of scale strengthening position• Continuing to grow and replant• Exchange rate and labor availability a major concern
Argentina	<ul style="list-style-type: none">• Challenges to remaining competitive, undergoing correction• Many challenges resulted from rapid growth• Growth very limited• Some operators better positioned than others and doing well
Uruguay	<ul style="list-style-type: none">• Comparatively small but growing
Other Countries	<ul style="list-style-type: none">• New growing regions and markets in South America

Europe



2010 European Highbush Production

Southern & Western Europe

	2008 Million Lbs.			2010 Million Lbs.		
	Fresh	Process	Total	Fresh	Process	Total
France	2.20	0.23	2.43	3.75	0.22	3.97
Spain	9.20	0.00	9.20	17.63	0.00	17.63
Portugal	1.00	0.00	1.00	2.42	0.00	2.42
TOTAL	12.40	0.23	12.63	23.80	0.22	24.02
	↑		↑	↑		↑

2010 European Highbush Production

Southern & Western Europe

	2005 Acres	2007 Acres	2008 Acres	2010 Acres	2010 Million Lbs.		
					Fresh	Process	Total
France	741	810	840	890	3.75	0.22	3.97
Spain	494	1,870	2,100	2,600	17.63	0.00	17.63
Portugal	99	320	330	480	2.42	0.00	2.42
TOTAL	1,334	3,000	3,270	3,970	23.80	0.22	24.02

2010 European Highbush Summary

Southern & Western Europe

	2010 Acres	Timing	Total Prod
France	890	Jul-Aug	4.0
Spain	2,600	Mar-Jun	17.6
Portugal	480	Apr-Jun	2.4
TOTAL	3,970	Mar-Aug	24.0

NORTHERN

- *Duke*
- *Bluecrop*
- *Brigitta*
- *Draper*
- *Elliott*
- *Aurora*

SOUTHERN

- *Star*
- *Misty*
- *Oneal*
- *Bluecrisp*
- *Windsor*
- *Private*

RABBITEYE

- *Ochlockonee*
- *Powderblue*

2010 European Highbush Production

Central & Northern Europe

	2008 Million Lbs.			2010 Million Lbs.		
	Fresh	Process	Total	Fresh	Process	Total
Austria	0.40	0.10	0.50	0.60	0.11	0.71
Denmark	0.10	0.10	0.20	0.28	0.03	0.31
Netherlands	3.30	0.30	3.60	2.76	0.28	3.03
Germany	16.53	0.33	16.86	18.73	1.21	19.95
Ireland	0.05	0.00	0.05	0.13	0.00	0.13
Italy	3.30	0.10	3.40	3.64	0.22	3.86
Sweden	0.10	0.10	0.20	0.22	0.01	0.23
Switzerland	0.20	0.10	0.30	0.20	0.10	0.30
UK	0.65	0.00	0.65	2.40	0.10	2.50
TOTAL	24.63	1.13	25.76	28.95	2.06	31.01

2010 European Highbush Production

Central & Northern Europe

	2005 Acres	2007 Acres	2008 Acres	2010 Acres	2010 Million Lbs.		
					Fresh	Process	Total
Austria	0	100	110	125	0.60	0.11	0.71
Denmark	0	50	50	60	0.28	0.03	0.31
Netherlands	0	580	600	1,180	2.76	0.28	3.03
Germany	3,954	4,400	5,063	5,300	18.73	1.21	19.95
Ireland	0	25	35	35	0.13	0.00	0.13
Italy	445	540	600	680	3.64	0.22	3.86
Sweden	0	80	80	90	0.22	0.01	0.23
Switzerland	0	50	50	55	0.20	0.10	0.30
UK	49	550	550	670	2.40	0.10	2.50
TOTAL	4,448	6,375	7,138	8,195	28.95	2.06	31.01

2010 European Highbush Summary

Central & Northern Europe

	2010 Acres	Timing	Total Prod
Austria	125	Jul-Aug	0.7
Denmark	60	Jul-Sep	0.3
Netherlands	1,180	Jun-Sep	3.0
Germany	5,300	Jul-Sep	19.9
Ireland	35	Jul-Sep	0.1
Italy	680	Jun-Aug	3.9
Sweden	90	Aug-Sep	0.2
Switzerland	55	Jul-Sep	0.3
UK	670	Jul-Sep	2.5
TOTAL	8,195	Jun-Sep	31.0

NORTHERN

- *Duke*
- *Bluecrop*
- *Draper*
- *Elliott*
- *Brigitta*
- *Aurora*

2010 European Highbush Production

Eastern Europe

	<i>2008 Million Lbs.</i>			<i>2010 Million Lbs.</i>		
	Fresh	Process	Total	Fresh	Process	Total
Baltics	0.00	0.00	0.00	1.10	0.00	1.10
Poland	17.40	0.60	18.00	13.84	9.91	23.75
Ukraine	0.00	0.00	0.00	0.44	0.22	0.66
Romania	0.00	0.00	0.00	0.42	0.00	0.42
Others	0.00	0.00	0.00	0.09	0.09	0.18
TOTAL	17.40	0.60	18.00	15.89	10.22	26.11

2010 European Highbush Production

Eastern Europe

	2005 Acres	2007 Acres	2008 Acres	2010 Acres	2010 Million Lbs.		
					Fresh	Process	Total
Baltics	0	250	290	335	1.10	0.00	1.10
Poland	3,954	6,700	6,900	7,800	13.84	9.91	23.75
Ukraine	0	160	180	190	0.44	0.22	0.66
Romania	0	100	120	130	0.42	0.00	0.42
Others	0	120	140	160	0.09	0.09	0.18
TOTAL	3,954	7,330	7,630	8,615	15.89	10.22	26.11

2010 European Highbush Summary

Eastern Europe

	2010 Acres	Timing	Total Prod
Baltics	335	Aug-Sep	0.0
Poland	7,800	Aug-Sep	18.0
Ukraine	190	Jul-Sep	0.0
Romania	130	Jul-Sep	0.0
Others	160	0	0.0
TOTAL	8,615	Jul-Sep	18.0

NORTHERN

- *Bluecrop*
- *Draper*
- *Elliott*
- *Bluegold*

2010 European Highbush Production

	2008 Million Lbs.			2010 Million Lbs.		
	Fresh	Process	Total	Fresh	Process	Total
South & Western	12.40	0.23	12.63	23.80	0.22	24.02
Central & Northern	24.63	1.13	25.76	28.95	2.06	31.01
Eastern	17.40	0.60	18.00	15.89	10.22	26.11
TOTAL	54.43	1.96	56.39	68.64	12.50	81.14



2010 European Highbush Production

	2005 Acres	2007 Acres	2008 Acres	2010 Acres	2010 Million Lbs.		
					Fresh	Process	Total
South & Western	1,334	3,000	3,270	3,970	23.80	0.22	24.02
Central & Northern	4,448	6,375	7,138	8,195	28.95	2.06	31.01
Eastern	3,954	7,330	7,630	8,615	15.89	10.22	26.11
TOTAL	9,736	16,705	18,038	20,780	68.64	12.50	81.14

2010 European Highbush Summary

	2010 Acres	Timing	Total Prod
South & Western	3,970	Mar-Aug	24.0
Central & Northern	8,195	Jun-Sep	31.0
Eastern	8,615	Jul-Sep	26.1
TOTAL	20,780	Mar-Sep	81.1

NORTHERN

- *Duke*
- *Bluecrop*
- *Draper*
- *Elliott*

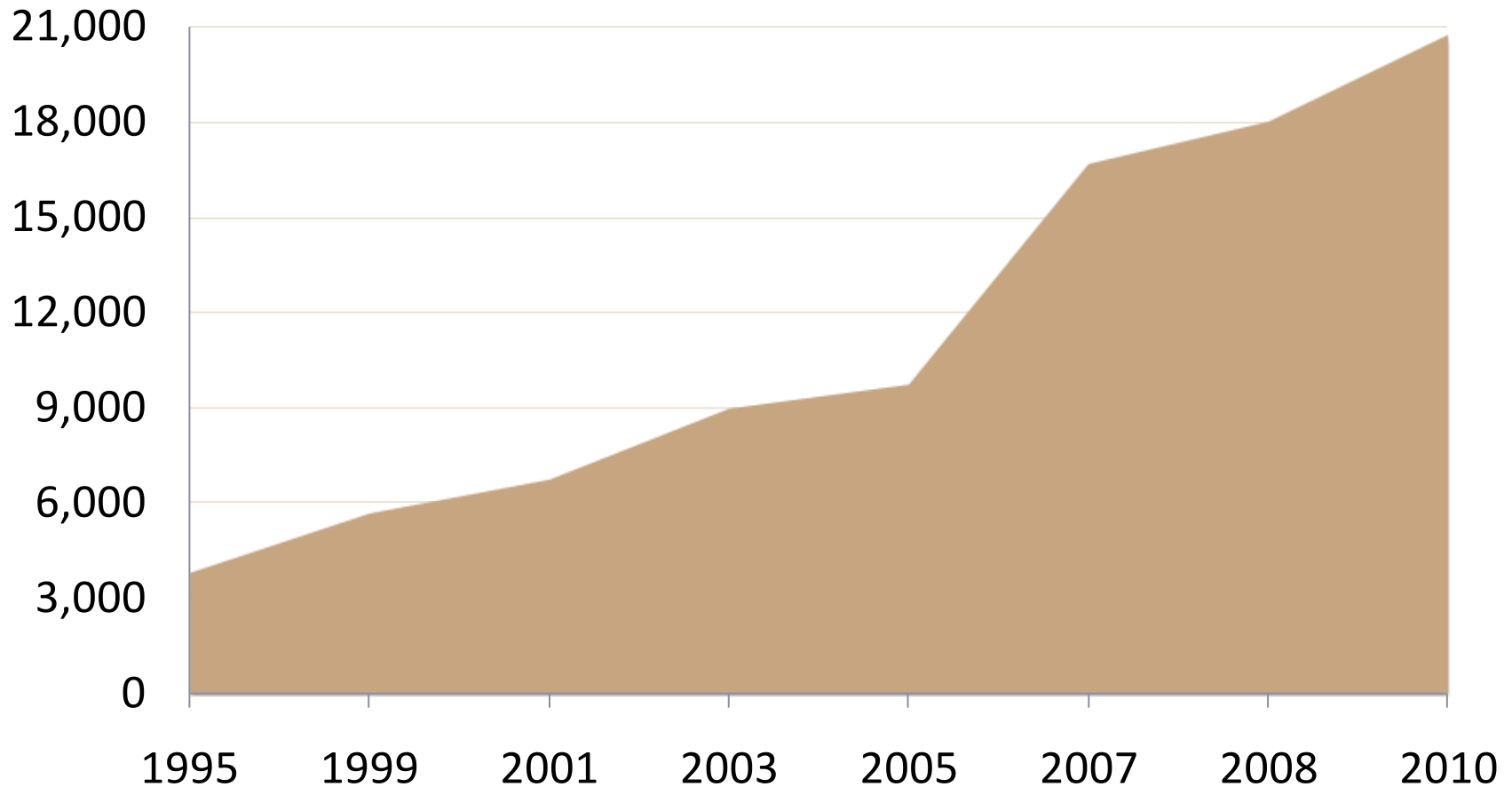
SOUTHERN

- *Star*
- *Misty*
- *Oneal*

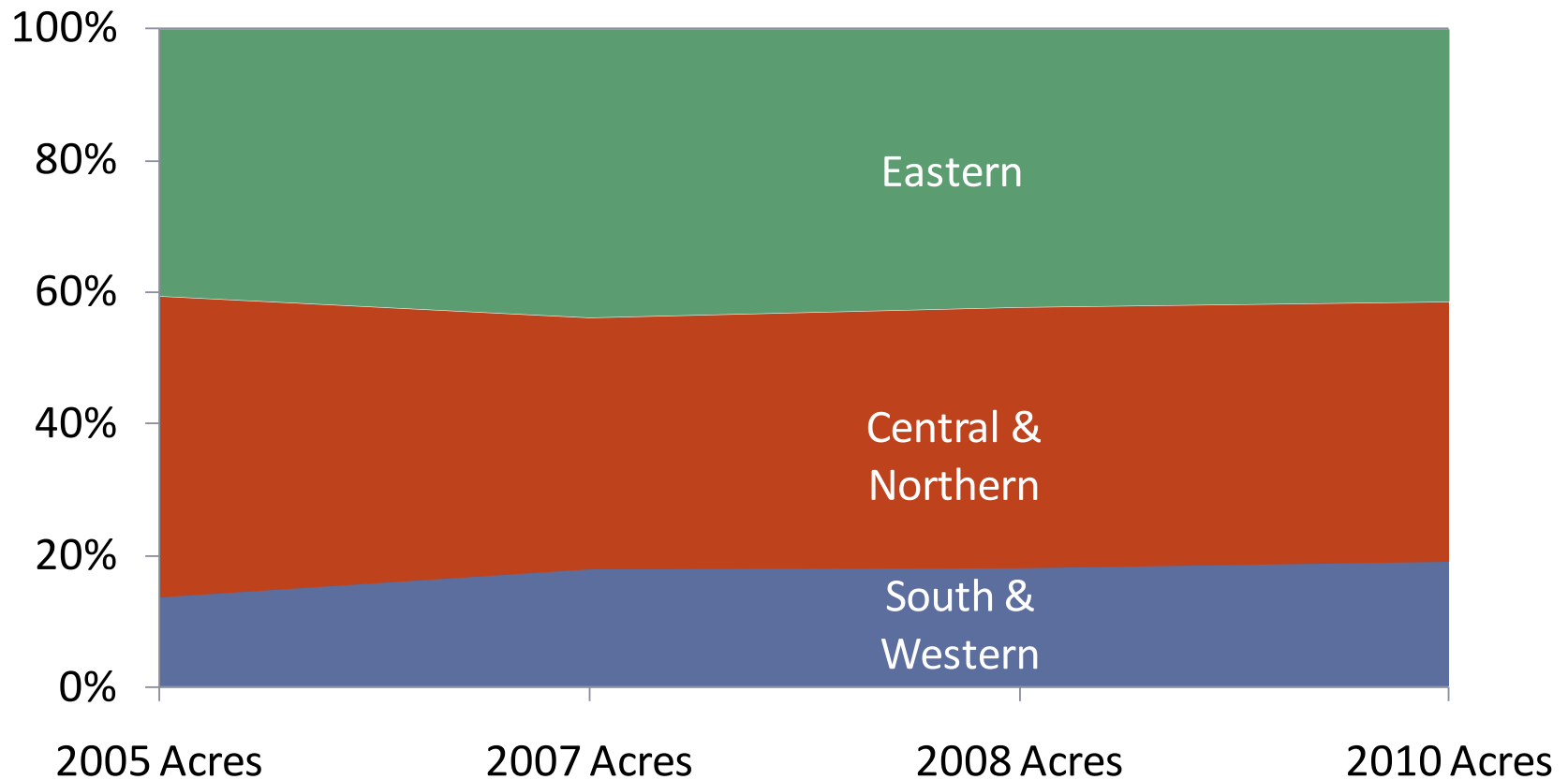
RABBITEYE

- *Ochlockonee*
- *Powderblue*

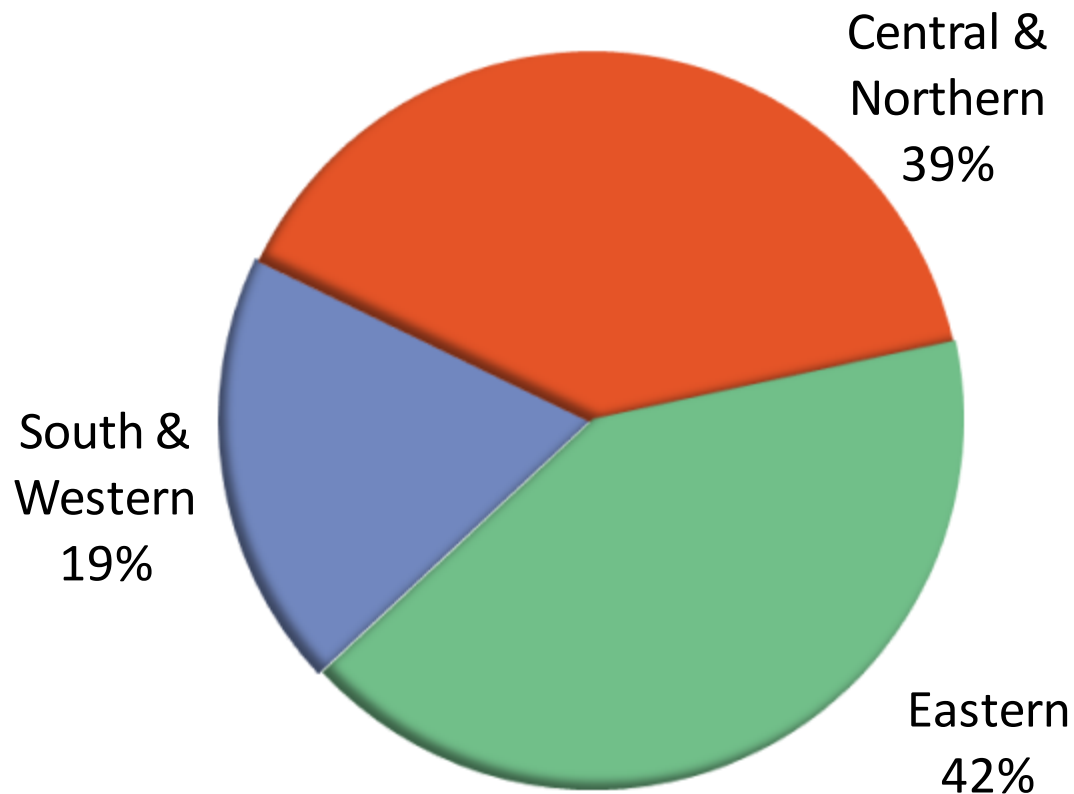
European Acreage Increases 1995 - 2010



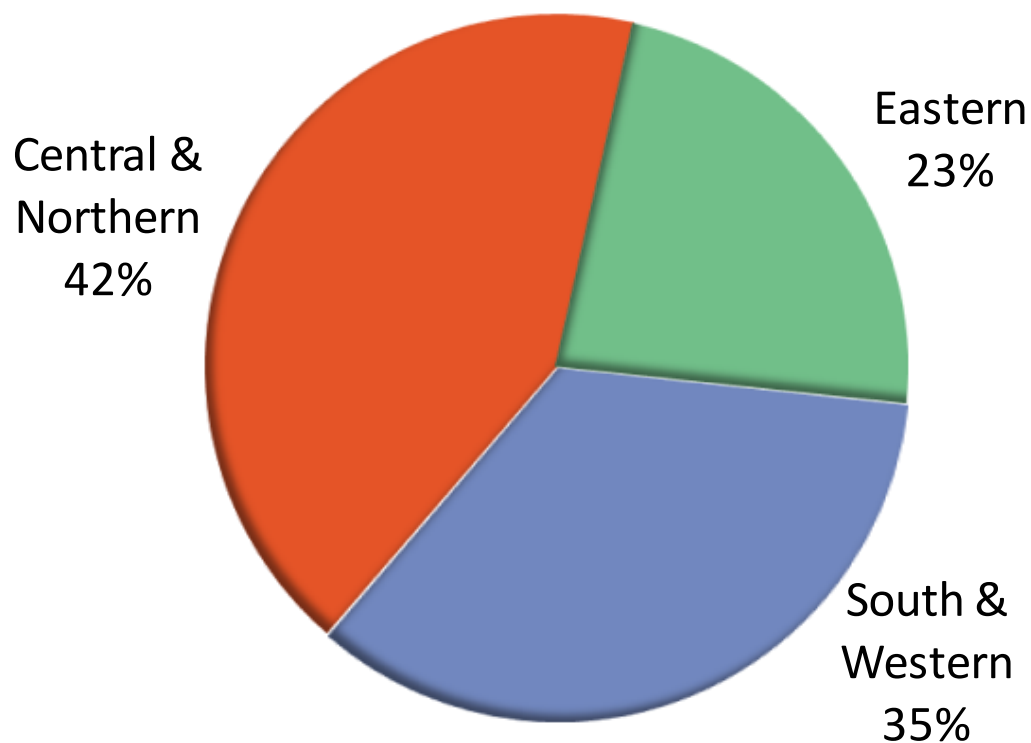
European Acreage Increases 2005 - 2010



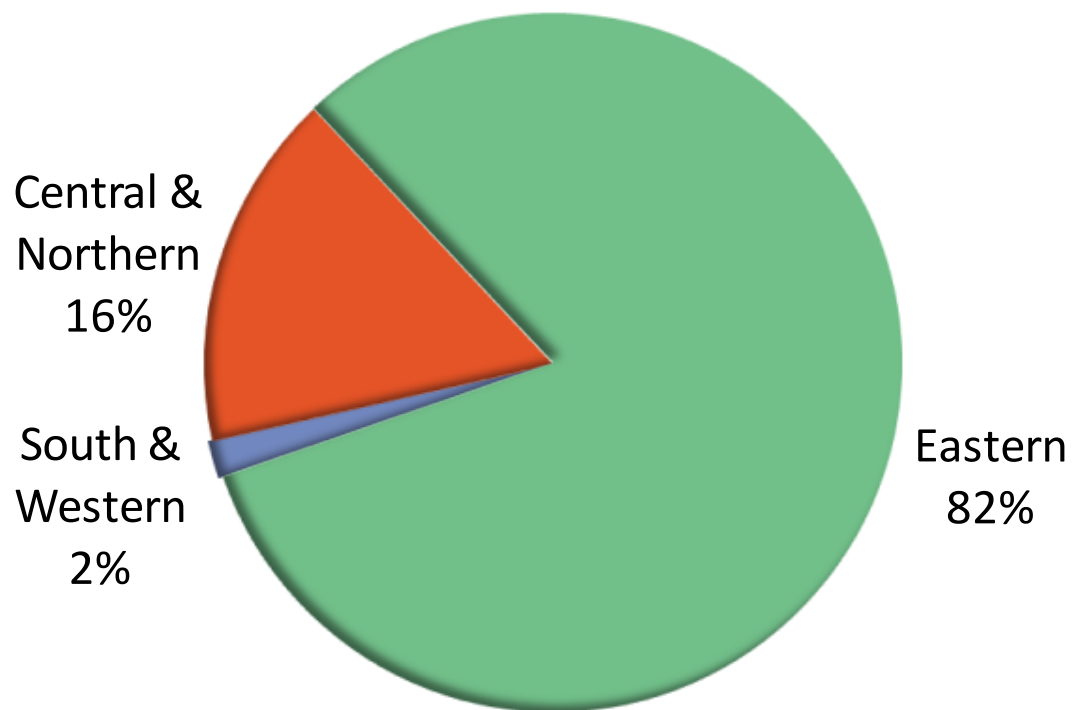
2010 European Acreage Distribution



2010 Europe Fresh Production



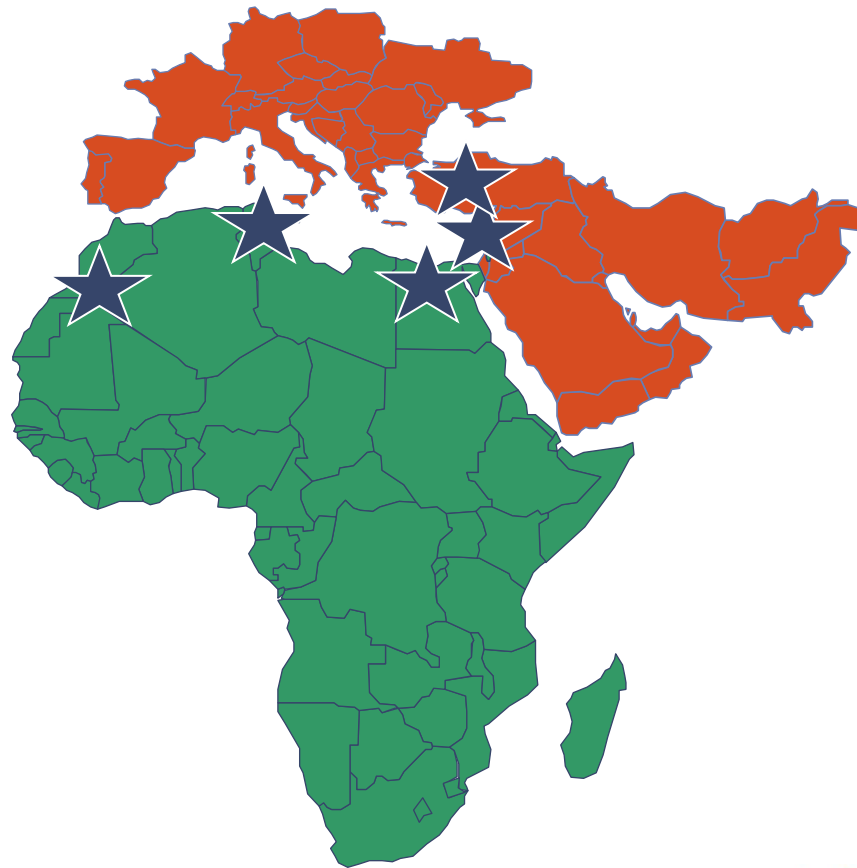
2010 Europe Processed Production



European Overview

Continent	<ul style="list-style-type: none">• Mainland consumption growing but gradually and limited to certain areas• Health research and media attention may help increase awareness and demand
South & Western	<ul style="list-style-type: none">• Spain's growth slowing in deference to lower cost Morocco• French growth limited - French market awaiting different flavor profile
Central & Northern	<ul style="list-style-type: none">• Main center of non-UK consumption growth• Some planting continues, locally focused
Eastern	<ul style="list-style-type: none">• Polish growth notably slowed• Some activity further east• Growth in Russian market

Mediterranean & North Africa



2010 Mediterranean & North Africa Highbush Production

	<i>2008 Million Lbs.</i>			<i>2010 Million Lbs.</i>		
	Fresh	Process	Total	Fresh	Process	Total
Morocco	0.30	0.00	0.30	1.76	0.02	1.79
Egypt	0.00	0.00	0.00	0.09	0.01	0.10
Turkey	0.50	0.00	0.50	0.13	0.01	0.14
Israel	0.01	0.00	0.01	0.10	0.00	0.10
Others	0.00	0.00	0.00	0.10	0.00	0.10
TOTAL	0.81	0.00	0.81	2.18	0.04	2.23

2010 Mediterranean & North Africa Highbush Production

	2005 Acres	2007 Acres	2008 Acres	2010 Acres	2010 Million Lbs.		
					Fresh	Process	Total
Morocco	0	170	180	450	1.76	0.02	1.79
Egypt	0	20	25	35	0.09	0.01	0.10
Turkey	0	0	120	150	0.13	0.01	0.14
Israel	0	25	30	35	0.10	0.00	0.10
Others	0	0	0	2	0.10	0.00	0.10
TOTAL	0	215	355	672	2.18	0.04	2.23

2010 Mediterranean & North Africa Highbush Summary

	2010 Acres	Timing	Total Prod
Morocco	450	Feb-Jun	1.79
Egypt	35	Feb-Jun	0.10
Turkey	150	Mar-Aug?	0.14
Israel	35	Mar-Jun?	0.10
Others	2	0	0.10
TOTAL	672	Feb-Jun	2.23

NORTHERN

- *Chandler*
- *Bluecrop*
- *Patriot*
- *Bluegold*

SOUTHERN

- *Misty*
- *Star*
- *Biloxi*
- *Sharpblue*
- *UF varieties*
- *Private*

Mediterranean & North Africa Overview

Morocco	<ul style="list-style-type: none">• Morocco continues to grow, driven by demand for lower cost higher quality spring fruit• Long term potential to supply spring fruit to Europe
North Africa	<ul style="list-style-type: none">• Limited activity outside of Morocco up to this point, demand for spring fruit remains strong
Mediterranean	<ul style="list-style-type: none">• Potential new consumption markets developing

Southern Africa



2010 Southern Africa Highbush Production

	<i>2008 Million Lbs.</i>			<i>2010 Million Lbs.</i>		
	Fresh	Process	Total	Fresh	Process	Total
South Africa	1.10	0.44	1.54	2.10	0.20	2.30
Zimbabwe	0.01	0.00	0.01	0.00	0.00	0.00
Others	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL	1.11	0.44	1.55	2.10	0.20	2.30

2010 Southern Africa Highbush Production

	2005 Acres	2007 Acres	2008 Acres	2010 Acres	2010 Million Lbs.		
					Fresh	Process	Total
South Africa	740	800	900	1,120	2.10	0.20	2.30
Zimbabwe	0	0	0	1	0.00	0.00	0.00
Others	0	0	0	1	0.00	0.00	0.00
TOTAL	740	810	910	1,124	2.10	0.20	2.30

2010 Southern Africa Highbush Summary

	2010 Acres	Timing	Total Prod
South Africa	1,120	Aug-Jan	2.3
Angola	2	Aug-Jan	0.0
Zimbabwe	1	0	0.0
Others	1	0	0.0
TOTAL	1,124	Aug-Jan	2.3

NORTHERN

- *Duke*
- *Legacy*
- *Chandler*
- *Elliott*

SOUTHERN

- *Emerald*
- *Jewel*
- *Star*
- *Snowchaser*

RABBITEYE

- *Ochlockonee*
- *Powerdblue*

Southern Africa Overview

Republic of South Africa	<ul style="list-style-type: none">• Industry seeking position as supplier of quality counter-seasonal blueberries to Europe and UK to compete with other southern hemisphere suppliers• Some barriers to rapid growth
Other Countries	<ul style="list-style-type: none">• Limited activity up to this point

Asia & Pacific



2010 Asia & Pacific Highbush Production

Asia

	<i>2008 Million Lbs.</i>			<i>2010 Million Lbs.</i>		
	Fresh	Process	Total	Fresh	Process	Total
China	1.76	2.30	4.06	3.00	3.60	6.60
India	0.00	0.00	0.00	0.20	0.00	0.20
Japan	4.00	0.05	4.05	4.90	0.20	5.10
South Korea	0.10	0.00	0.10	0.50	0.00	0.50
TOTAL	5.86	2.35	8.21	8.60	3.80	12.40

2010 Asia & Pacific Highbush Production

Asia

	2005 Acres	2007 Acres	2008 Acres	2010 Acres	2010 Million Lbs.		
					Fresh	Process	Total
China	642	3,275	2,900	8,645	3.00	3.60	6.60
India	0	0	60	80	0.20	0.00	0.20
Japan	1,112	1,300	2,090	2,230	4.90	0.20	5.10
South Korea	0	40	50	180	0.50	0.00	0.50
TOTAL	1,754	4,615	5,100	11,135	8.60	3.80	12.40

2010 Asia & Pacific Highbush Summary

Asia

	2010 Acres	Timing	Total Prod
China	8,645	May-Oct	6.6
India	80	Mar-Aug?	0.2
Japan	2,230	May-Aug	5.1
South Korea	180	Jun-Aug	0.5
TOTAL	11,135	May-Aug	12.4

NORTHERN

- *Duke*
- *Bluecrop*
- *Northland*
- *Elliott*

SOUTHERN

- *Misty*
- *Sharpblue*
- *Oneal*
- *UF and UG varieties in Japan*

ANGUSTIFOLIUM & HALFHIGHS

- *Tophat*
- *North Country*
- *Blomindon*
- *Northblue*

St. Cloud

RABBITEYE

- *Tifblue*
- *Centurion*
- *Beckyblue*

2010 Asia & Pacific Highbush Production

Pacific

	<i>2008 Million Lbs.</i>			<i>2010 Million Lbs.</i>		
	Fresh	Process	Total	Fresh	Process	Total
Australia	4.40	0.88	5.28	5.70	0.90	6.60
New Zealand	2.00	1.50	3.50	2.00	1.50	3.50
Philippines	0.01	0.00	0.01	0.00	0.00	0.00
TOTAL	6.41	2.38	8.79	7.70	2.40	10.10

2010 Asia & Pacific Highbush Production

Pacific

	2005 Acres	2007 Acres	2008 Acres	2010 Acres	2010 Million Lbs.		
					Fresh	Process	Total
Australia	1,384	1,450	1,470	1,530	5.70	0.90	6.60
New Zealand	1,050	1,290	1,290	1,450	2.00	1.50	3.50
Philippines	0	10	10	2	0.00	0.00	0.00
TOTAL	2,434	2,750	2,770	2,982	7.70	2.40	10.10

2010 Asia & Pacific Highbush Summary

Pacific

	2010 Acres	Timing	Total Prod
Australia	1,530	Aug-Jan	6.6
New Zealand	1,450	Nov-Mar	3.5
Philippines	2	Sep-Apr?	0.0
TOTAL	2,982	Aug-Apr?	10.1

NORTHERN

- *Duke*
- *Bluecrop*
- *Elliott*
- *Nui*
- *Puru*

SOUTHERN

- *Private*
- *Biloxi*
- *Sharpblue*

RABBITEYE

- *Rahi*
- *Maru*
- *Powderblue*

2010 Asia & Pacific Highbush Production

	<i>2008 Million Lbs.</i>			<i>2010 Million Lbs.</i>		
	Fresh	Process	Total	Fresh	Process	Total
Asia	5.86	2.35	8.21	8.60	3.80	12.40
Pacific	6.41	2.38	8.79	7.70	2.40	10.10
TOTAL	12.27	4.73	17.00	16.30	6.20	22.50

2010 Asia & Pacific Highbush Production

	2005 Acres	2007 Acres	2008 Acres	2010 Acres	2010 Million Lbs.		
					Fresh	Process	Total
Asia	1,754	4,615	5,100	11,135	8.60	3.80	12.40
Pacific	2,434	2,750	2,770	2,982	7.70	2.40	10.10
TOTAL	4,188	7,365	7,870	14,117	16.30	6.20	22.50

2010 Asia & Pacific Highbush Summary

	2010 Acres	Timing	Total Prod
Asia	11,135	May-Aug	12.4
Pacific	2,982	Aug-Apr?	10.1
TOTAL	14,117	52 wks	22.5

NORTHERN

- *Duke*
- *Legacy*
- *Chandler*
- *Elliott*

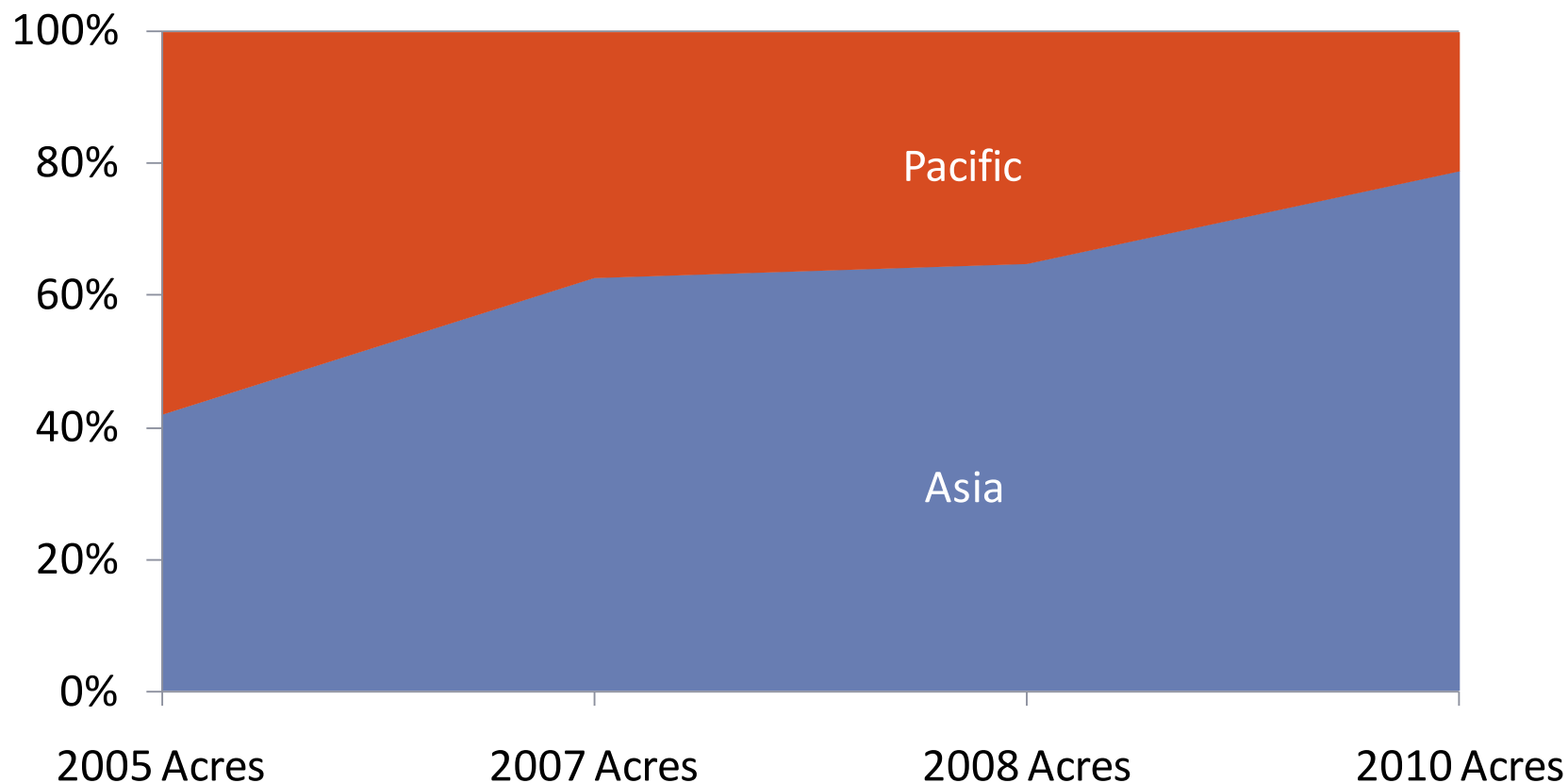
SOUTHERN

- *Emerald*
- *Jewel*
- *Star*
- *Snowchaser*

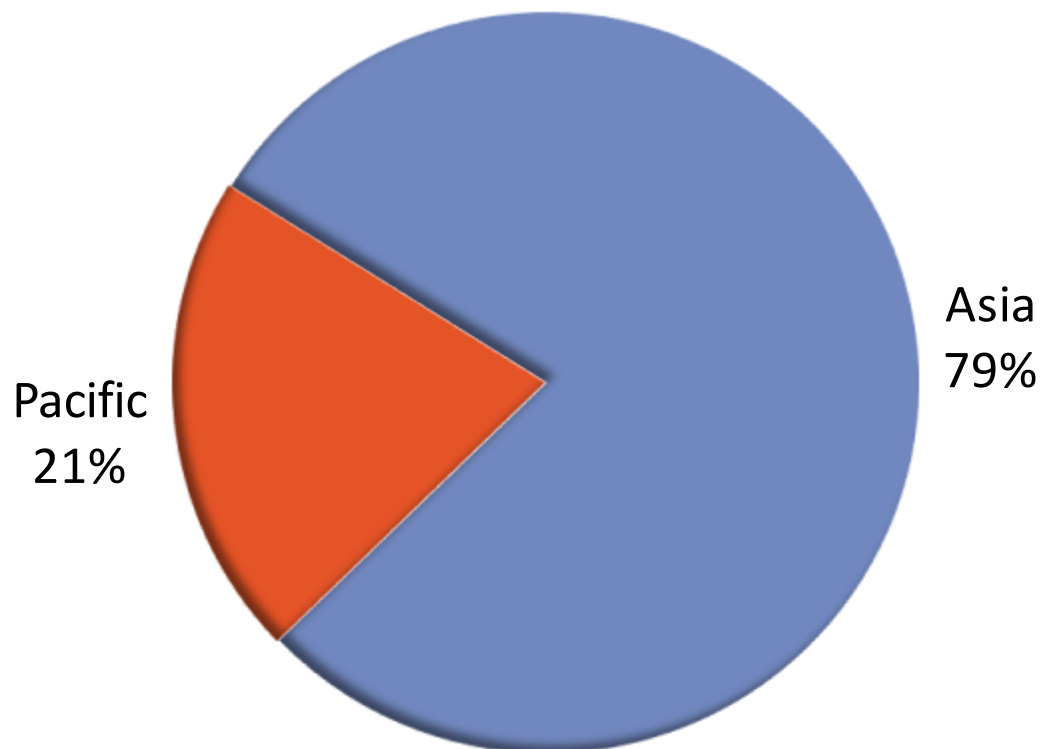
RABBITEYE

- *Ochlockonee*
- *Powerdblue*

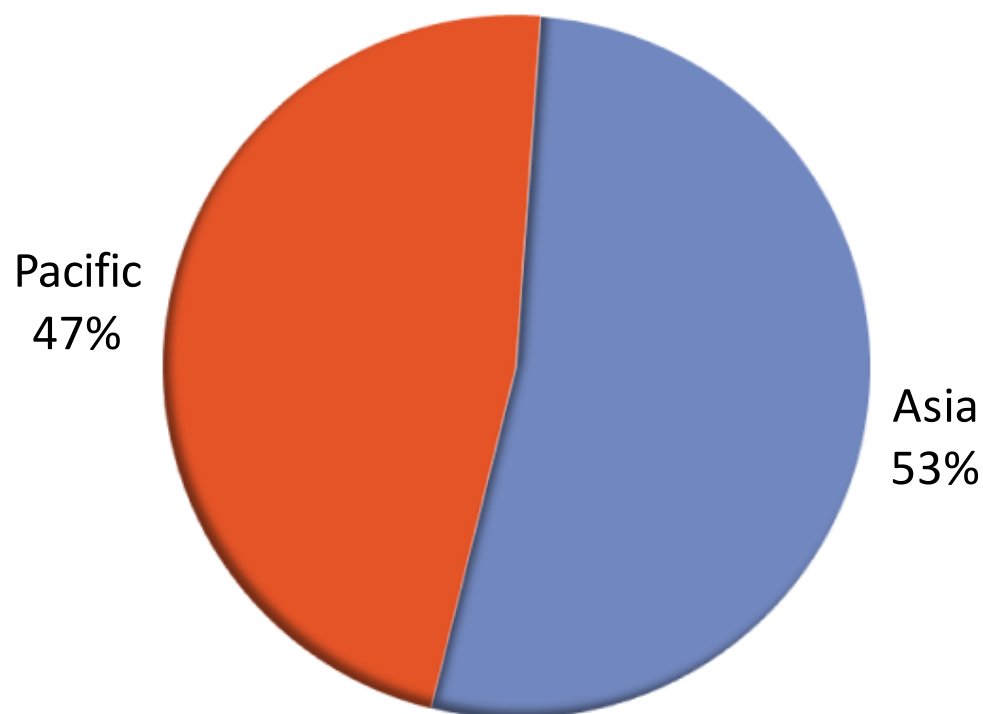
Asia & Pacific Acreage Increases 2005 - 2010



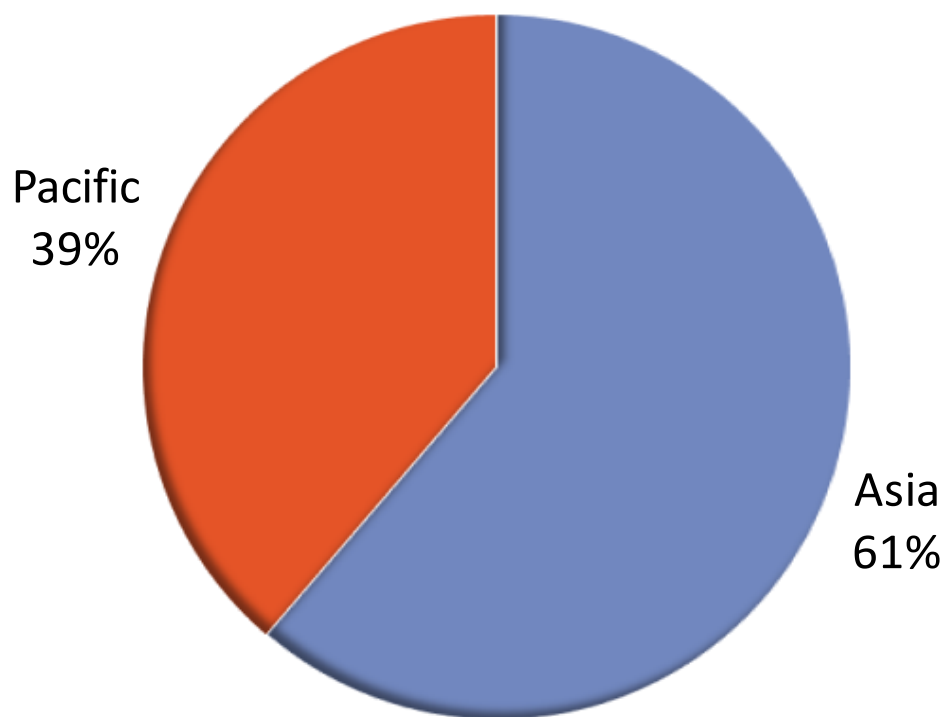
2010 Asia & Pacific Acreage Distribution



2010 Asia & Pacific Fresh Production



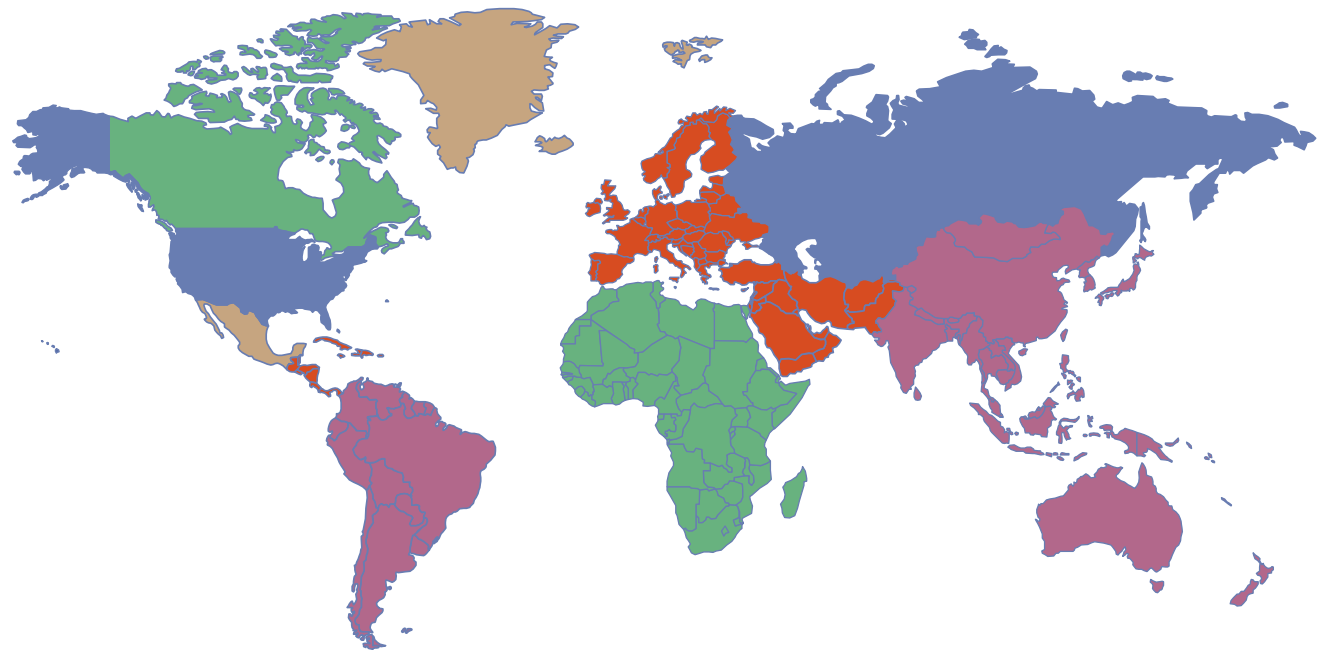
2010 Asia & Pacific Processed Production



Asia & Pacific Overview

Australia	<ul style="list-style-type: none"> • High demand in domestic market, opportunities for further exports if Mainland China and other markets open and grow
New Zealand	<ul style="list-style-type: none"> • Growth limited, highly professional, focused on supplying niche markets for high end quality fresh product
Japan	<ul style="list-style-type: none"> • Most established Asian market – domestic production preferred when available in late spring • Significant movement of fresh and processed imports
China	<ul style="list-style-type: none"> • Sleeping giant has awoken, huge market potential for exports of fresh and processed • Demand outstrips domestic supply for foreseeable future
South Korea	<ul style="list-style-type: none"> • “New Japan” for exports, high demand and increasing awareness of blueberries

World



2010 World Highbush Production by Region

	2008 Million Lbs.			2010 Million Lbs.		
	Fresh	Process	Total	Fresh	Process	Total
North America	229.40	186.35	415.75	303.00	188.30	491.30
South America	92.10	23.03	115.13	137.07	16.33	153.40
Europe	54.43	1.96	56.39	68.64	12.50	81.14
Med. & N. Africa	0.81	0.00	0.81	2.18	0.04	2.23
Southern Africa	1.11	0.44	1.55	2.10	0.20	2.30
Asia & Pacific	12.27	4.73	17.00	16.30	6.20	22.50
World Acreage	390.12	216.51	606.63	529.30	223.57	752.87
	↑	↑	↑	↑	↑	↑

2010 Worldwide Lowbush Production Wild Region

	2008 Million Lbs.			2010 Million Lbs.		
	Fresh	Process	Total	Fresh	Process	Total
Quebec	2.0	78.0	80.0	2.0	28.0	30.0
PEI	0.0	9.8	9.8	0.0	9.0	9.0
Nova Scotia	0.0	40.0	40.0	0.0	27.5	27.5
New Brunswick	0.0	33.7	33.7	0.0	25.0	25.0
New Foundland	0.0	1.7	1.7	0.0	0.5	0.5
Maine	0.5	89.5	90.0	0.5	64.5	65.0
China V. Ulig., Vitis Idaea	0.0	6.6	6.6	0.0	10.0	10.0
Europe	0.0	25.0	25.0	2.0	15.0	17.0
Total Wild	2.5	284.3	286.8	4.5	179.5	184.0



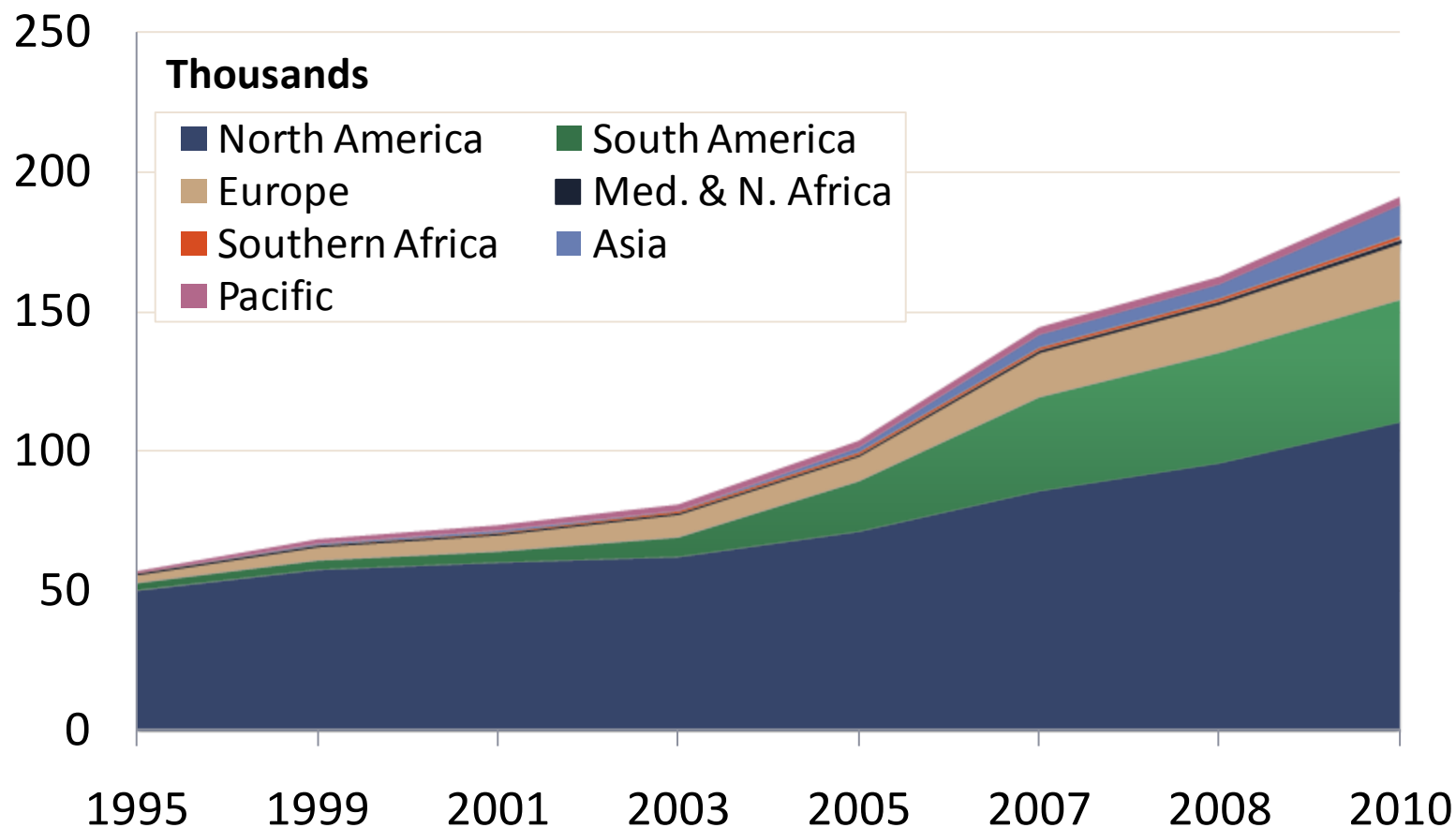
2010 World Highbush Production by Region

	2005 Acres	2007 Acres	2008 Acres	2010 Acres	2010 Million Lbs.		
					Fresh	Process	Total
North America	71,075	85,617	95,607	110,290	303.00	188.30	491.30
South America	18,039	33,650	39,703	44,000	137.07	16.33	153.40
Europe	9,736	16,705	18,038	20,780	68.64	12.50	81.14
Med. & N. Africa	0	215	355	672	2.18	0.04	2.23
Southern Africa	740	810	910	1,124	2.10	0.20	2.30
Asia & Pacific	4,188	7,365	7,870	14,117	16.30	6.20	22.50
World Acreage	103,778	144,362	162,483	190,983	529.30	223.57	752.87

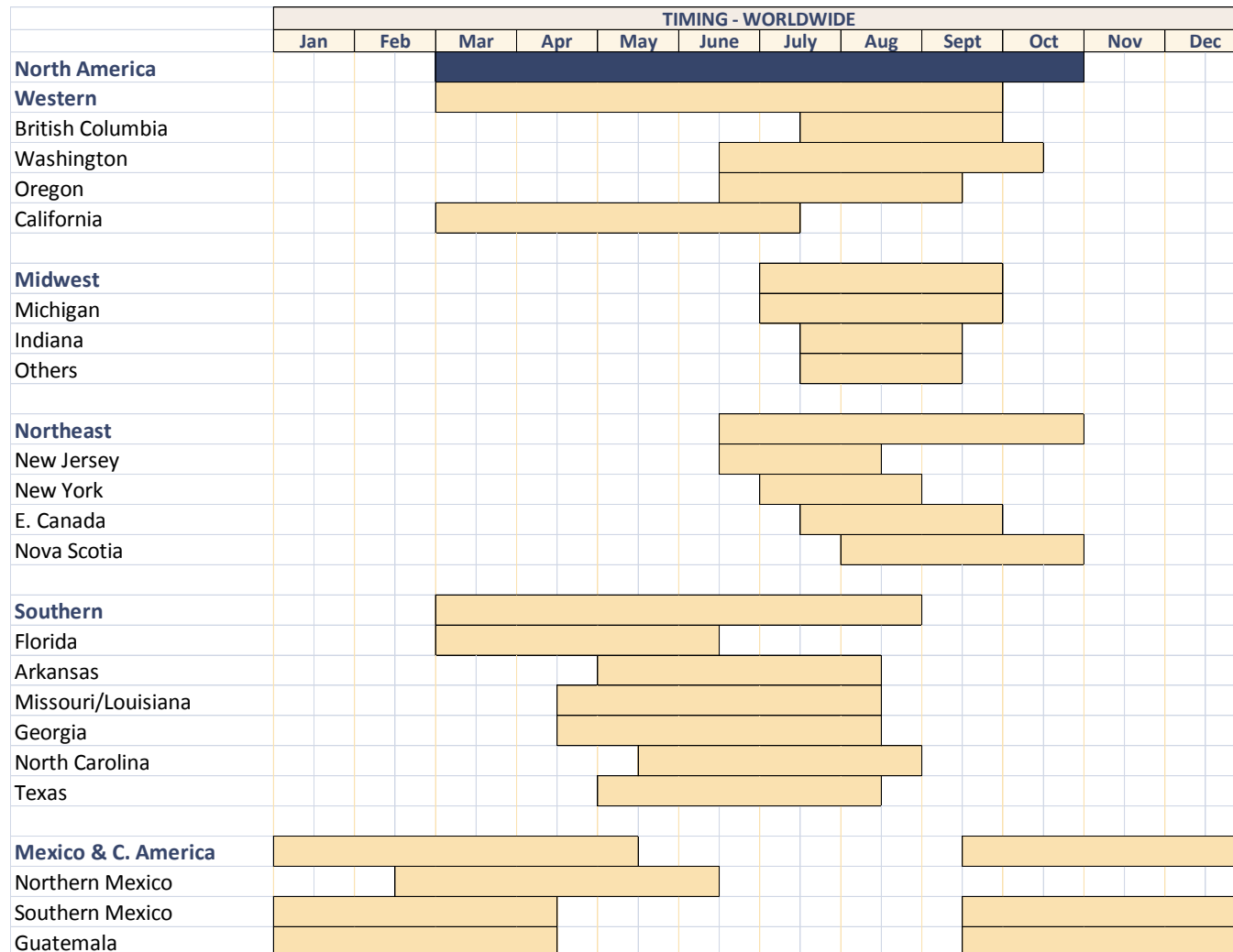
2010 World Highbush & Wild Production by Region

	2008 Million Lbs.			2010 Million Lbs.		
	Fresh	Process	Total	Fresh	Process	Total
North America	231.9	439.1	671.0	305.5	342.8	648.3
South America	92.1	23.0	115.1	137.1	16.3	153.4
Europe	54.4	27.0	81.4	70.6	27.5	98.1
Med. & N. Africa	0.8	0.0	0.8	2.2	0.0	2.2
Southern Africa	1.1	0.4	1.6	2.1	0.2	2.3
Asia & Pacific	12.3	11.3	23.6	16.3	16.2	32.5
TOTAL	392.62	500.81	893.43	533.80	403.07	936.87
	↑	↑	↑	↑	↑	↑

World Acreage Increases 1995 - 2010



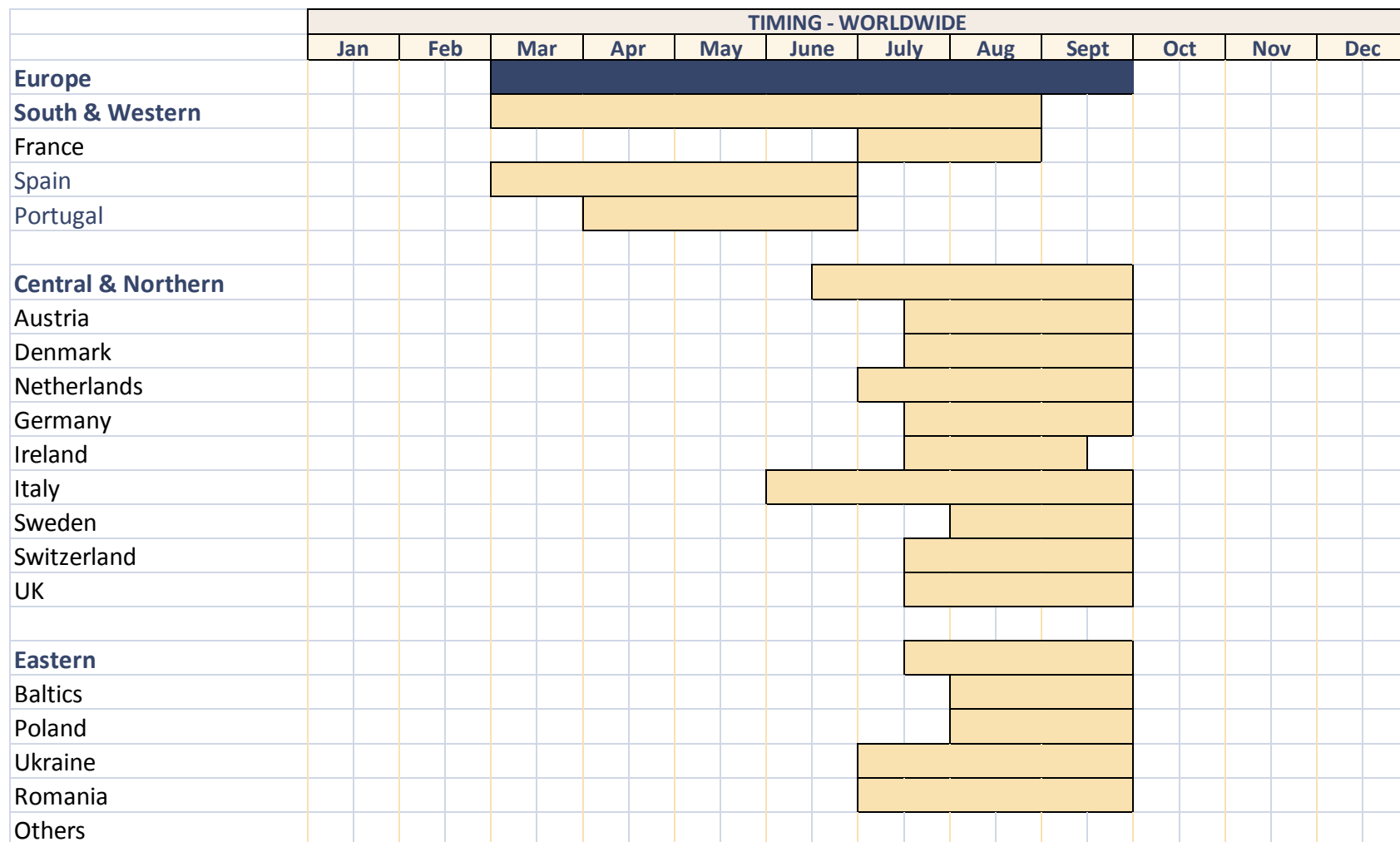
Timing – North America



Timing –Americas

	TIMING - WORLDWIDE											
	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
North America												
Western												
Midwest												
Northeast												
Southern												
Mexico & C. America												
South America												
Chile												
Argentina												
Uruguay												
Peru												
Brazil												
Colombia												

Timing –Europe



Timing –Mediterranean & Africas

	TIMING - WORLDWIDE											
	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Med. & N. Africa												
Morocco												
Egypt												
Turkey												
Israel												
Others												
Southern Africa												
South Africa												
Angola												
Others												
South America												
Chile												
Argentina												
Uruguay												
Peru												
Brazil												
Colombia												

Timing – Europe, Mediterranean & Africas

	TIMING - WORLDWIDE											
	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Europe												
South & Western												
Central & Northern												
Eastern												
Med. & N. Africa												
Southern Africa												
South America												
Chile												
Argentina												
Uruguay												
Peru												
Brazil												
Colombia												

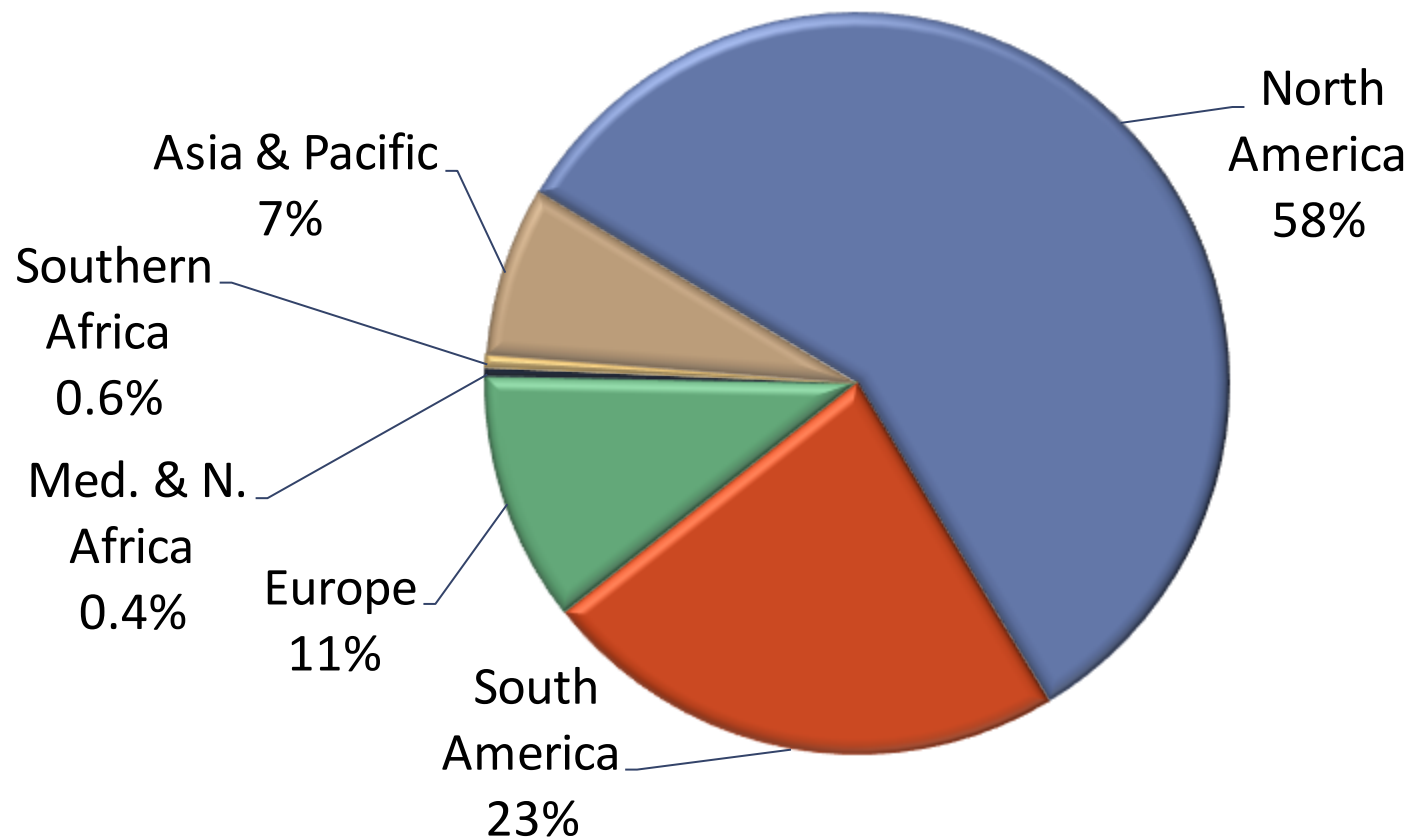
Timing – Asia & Pacific

	TIMING - WORLDWIDE											
	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Asia & Pacific												
Asia												
China												
India												
Japan												
South Korea												
Pacific												
Australia												
New Zealand												
Phillipines												
South America												
Chile												
Argentina												
Uruguay												
Peru												
Brazil												
Colombia												

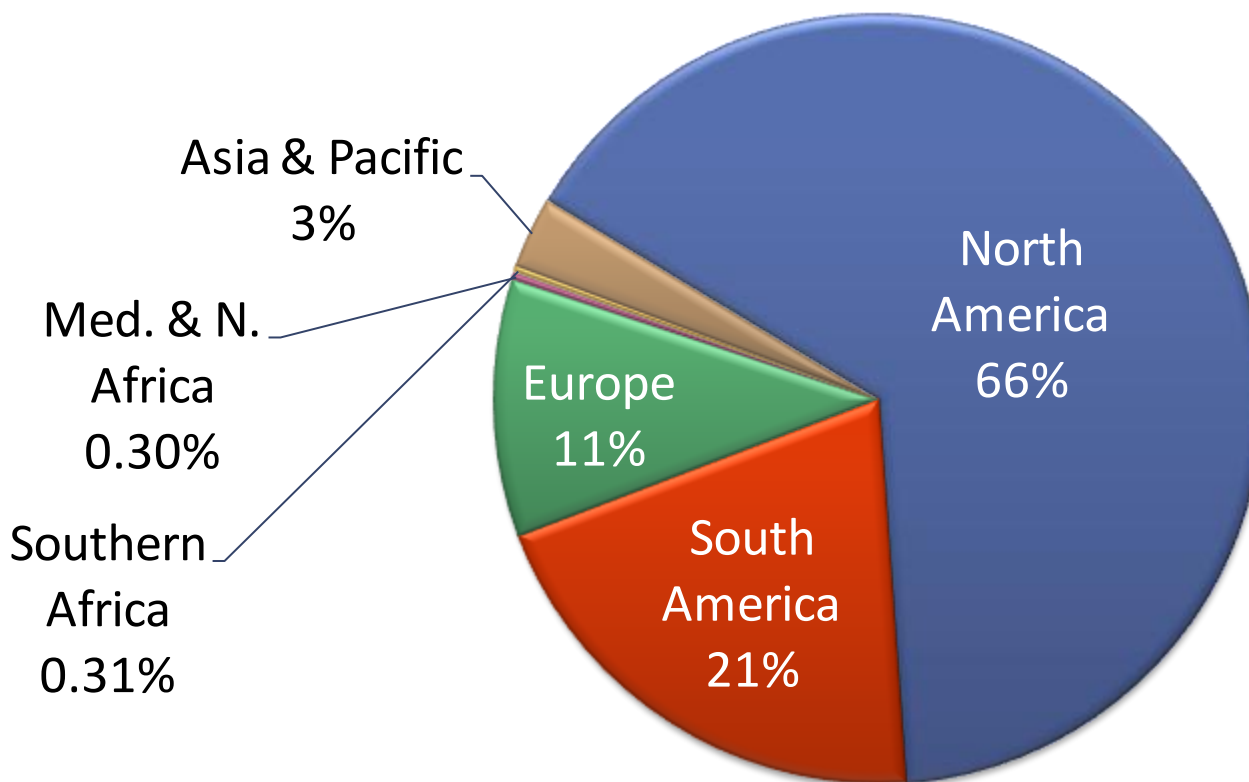
Timing – Worldwide

	TIMING - WORLDWIDE											
	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
North America												
South America												
Europe												
Mediterranean & North Africa												
South Africa												
Asia & Pacific												

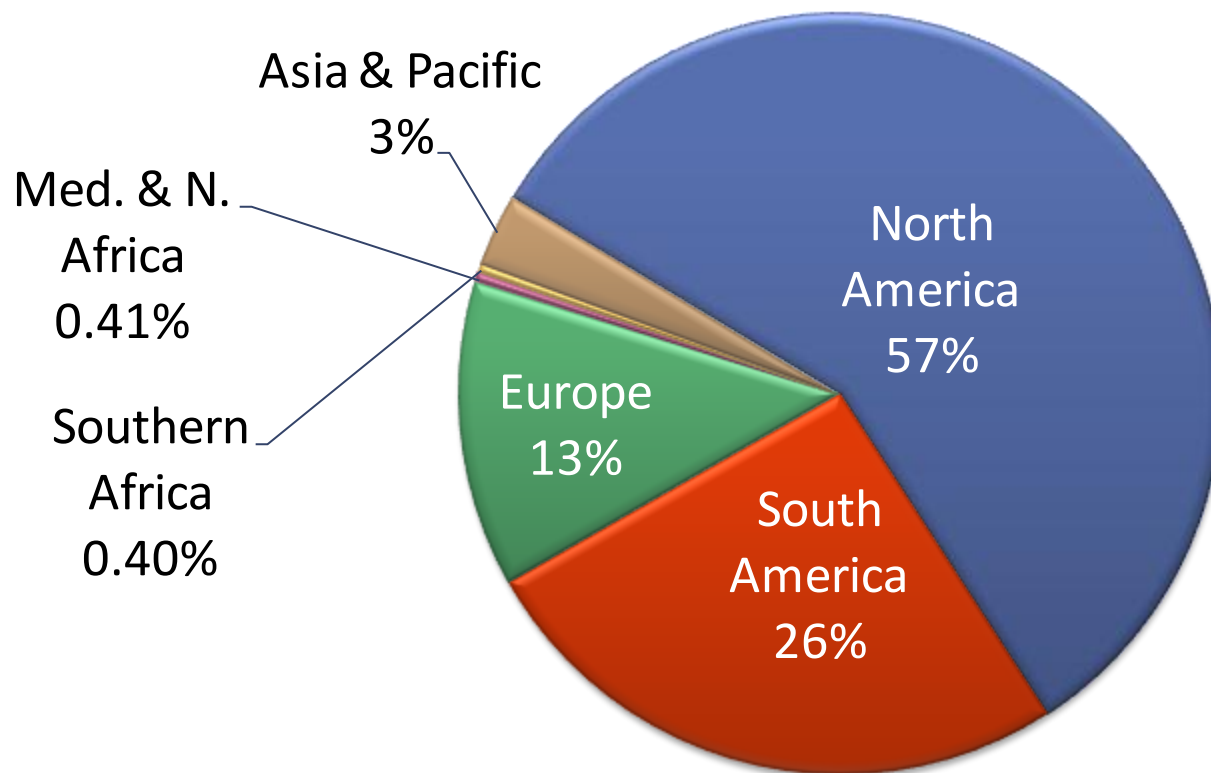
World Acreage Distribution



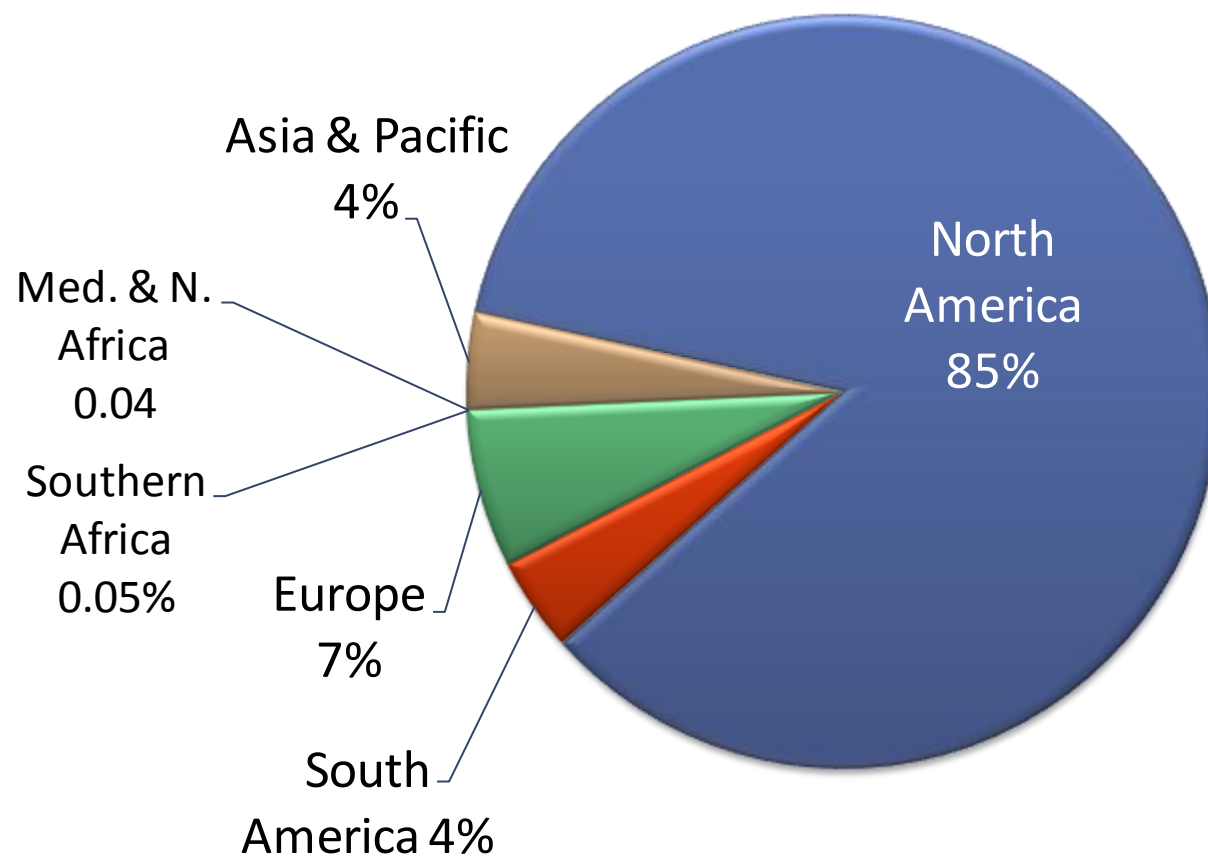
2010 Total World Production



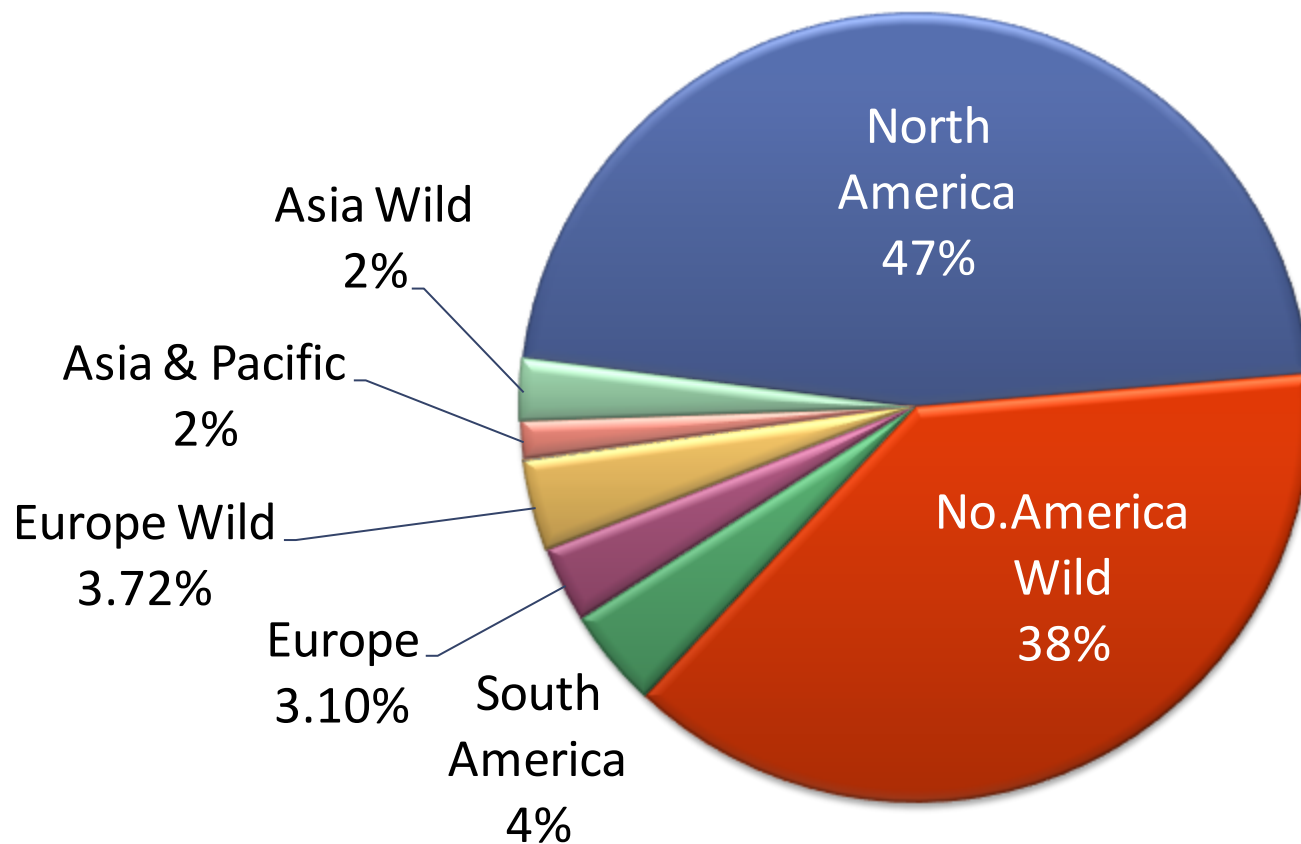
2010 World Fresh Production



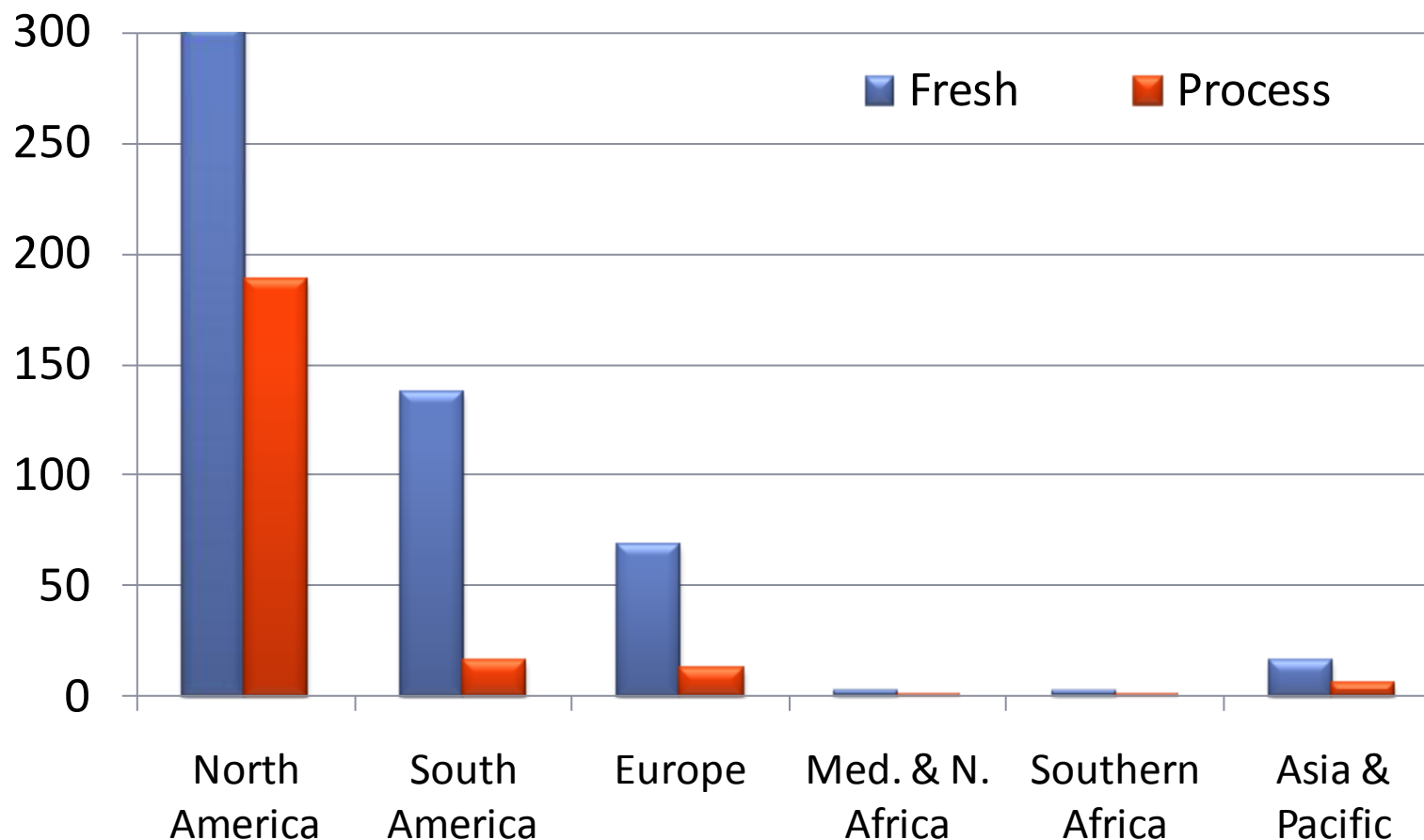
2010 World Highbush Processed Production



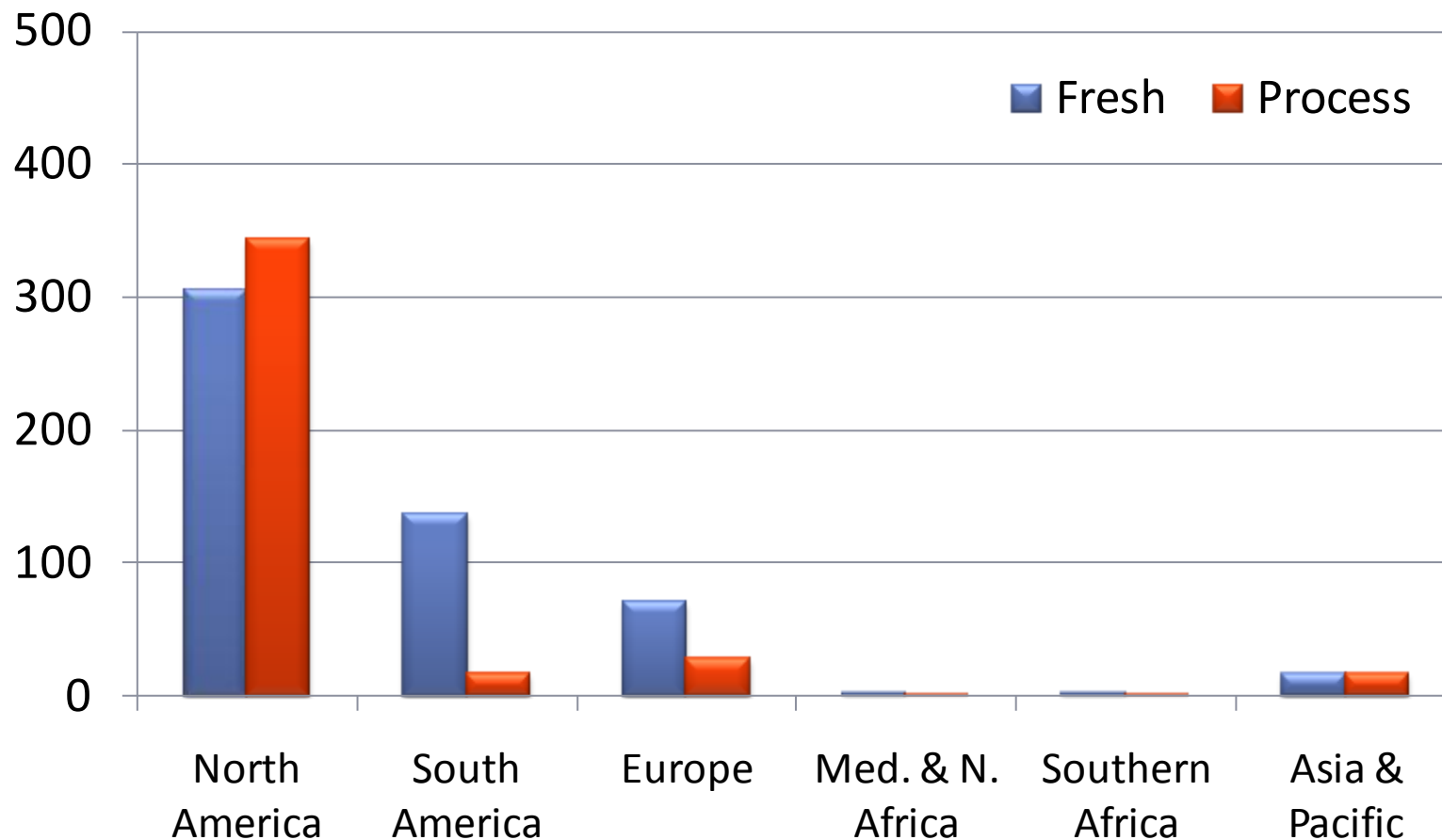
2010 World Highbush and Lowbush Processed Production



2010 World Highbush Fresh vs. Processed



2010 World Highbush & Wild Fresh vs. Processed



Worldwide Trends

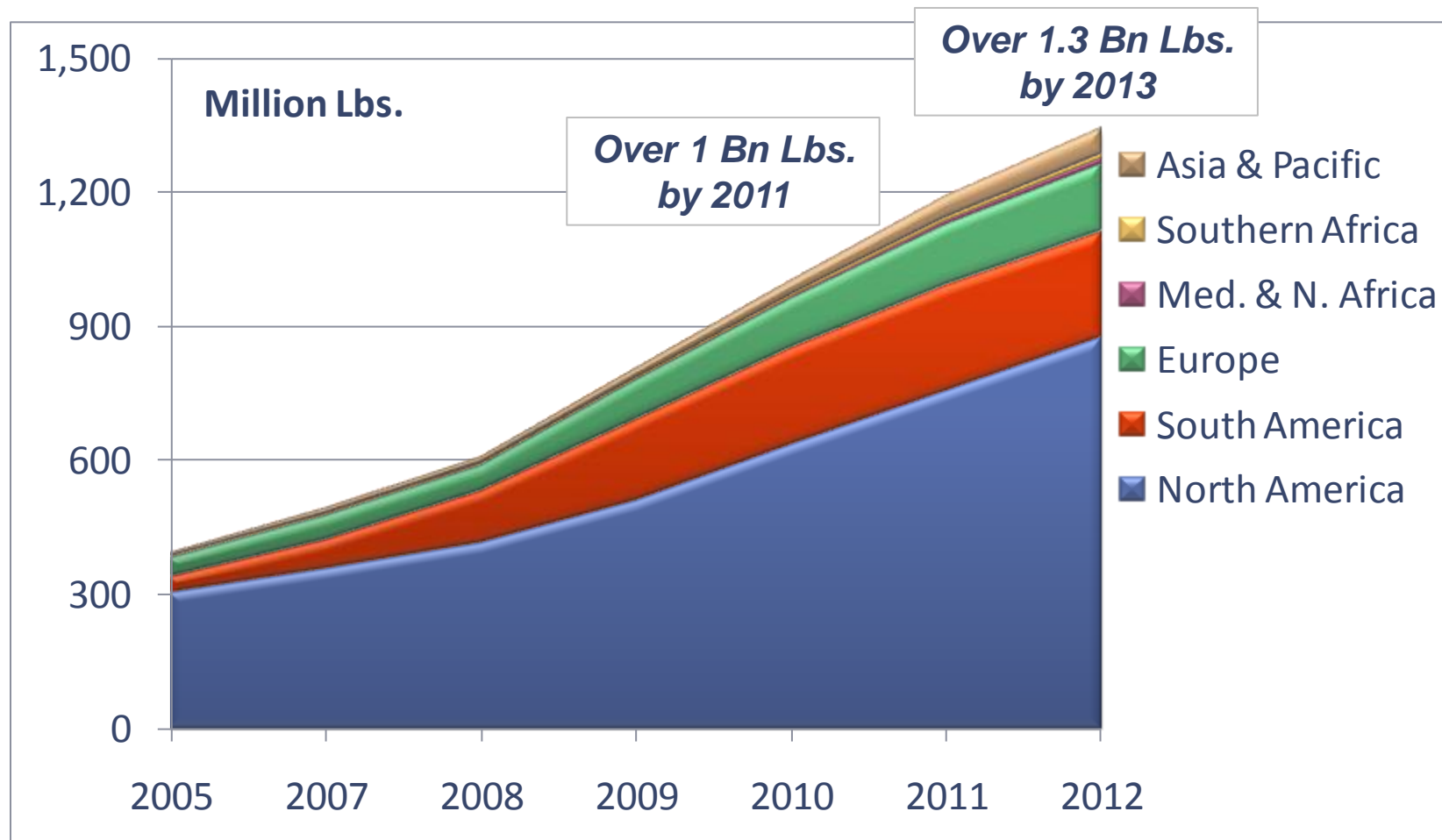
Americas	<ul style="list-style-type: none">• Home of majority of the world's production• North America remains by far the largest market• Room for growth in both fresh and processed
Europe & Africa	<ul style="list-style-type: none">• Production developing gradually• Mainland European market presents untapped potential for consumption growth• Still UK-centric
Asia & Pacific	<ul style="list-style-type: none">• Asia contains the fastest growing markets for blueberries in the world today• Production is growing but not as rapidly as demand

Worldwide Trends

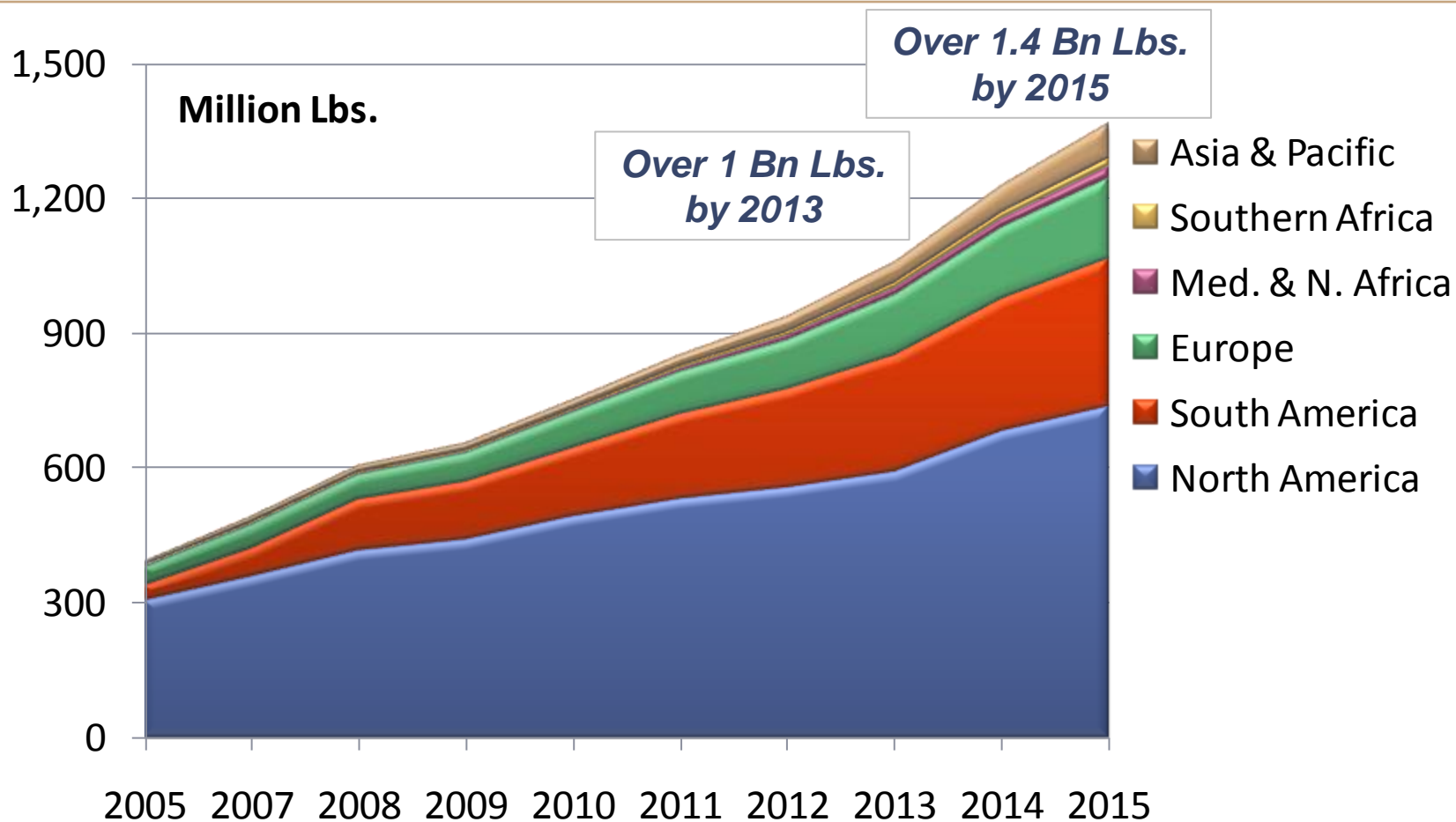
Worldwide

- Blueberry industry going global – both production and consumption
- New consumers now a major driver of demand
- Fresh has been in the driver's seat, how can this consumption growth be sustained?
- Opportunity for renewed growth in processed
- Rapid growth creates unique challenges
- General drive towards professionalism, quality and scale
- Repositioning and retooling in established regions
- Globalization: Blueberries following the global consumption and production trends of other foods and desirable goods

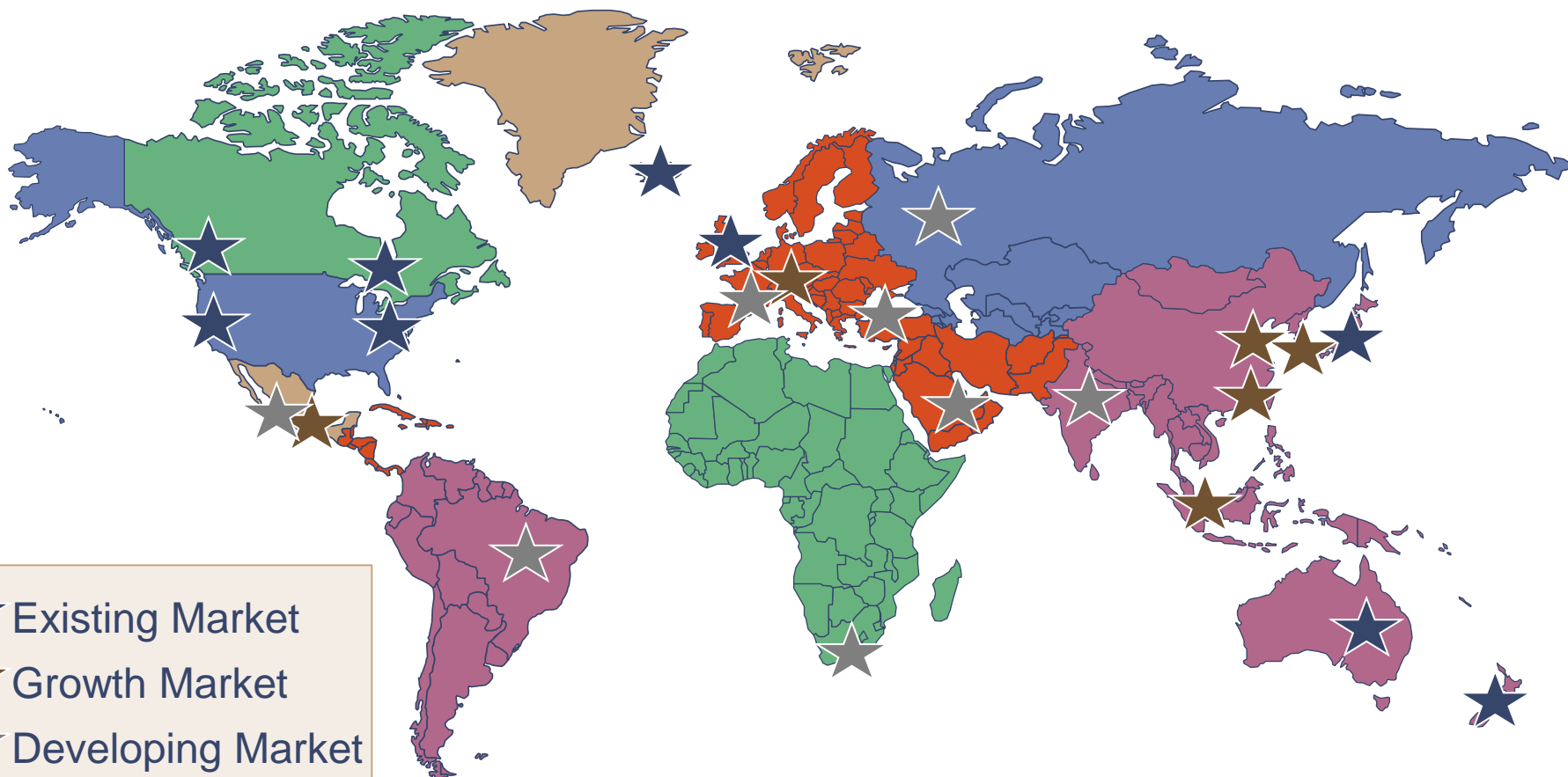
2008 World Production Growth Prediction



2010 World Production Growth Prediction



Where Have They Been ...



Special Thanks to all the Contributors!

Please remember the data in this report is a combination of hard data, soft data, official estimates, not so official estimates, conjecture, best guesses and wild guesses!

Special thanks to leading growers, shippers, packers, officials, suppliers, extension, foreign service, researchers and others from around the world who made this report possible!

Also, thanks to Northwest Visuals and team members at Fall Creek Farm and Nursery for their support in data collection and preparation.