

RASPBERRY ANALYSIS 2021

PRODUCTION, EXPORT, MARKET



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Overview



Overview



Botanically the raspberry is a polyanthus, but from the commercial point of view it is considered a berry. It is a crop of great economic and social importance for Mexico, because most of the production is exported, obtaining farmers very good prices almost all year round, plus it is a crop whose mechanization will be complicated in the future, which means that it will continue to require a lot of labor.

World raspberry production decreased 3.3% in 2019 compared to the previous year, even though the harvested area in the world increased slightly, so the factor responsible for this decrease was the average yield, which showed a decline. Despite this, production numbers for this crop over the last decade remain positive, largely due to the considerable increase in production that occurred in 2015 and 2016.

The country that is the great reference in terms of production level is Russia, which had 21.2% of the world total, followed by Mexico, Serbia, the United States and Poland; however, the Mexican raspberry yield was 3.1 times higher than the average national yield in Russia, which places Mexico in third position in terms of raspberry yield, a parameter that is led by Spain, with a significant advantage.

Raspberries are a strategic crop for Mexico, being the second largest exporter worldwide and sending most of its exports to the United States, which, by the way, is in third position.

It is important to mention that the United States is also the world's leading importer, accounting for 45.9% of world imports in 2020, followed by Canada, with 9.7%.

The value of Mexican raspberry exports to the United States has maintained a steady growth rate over the last 5 years, with H52, Berries Paradise and Driscoll's being the companies with the highest number of fresh product shipments to that country.

In Mexico, the national average yield has remained relatively stable in recent years, above 18.0 t/ha, although in 2020 there was a decrease in the average price per ton, most likely due to logistical problems caused by the COVID-19 pandemic, which affected the value of national raspberry production, which decreased by 7.8% compared to the previous year, despite the fact that there was a considerable increase in the number of tons produced, due to an increase in the harvested area.

Jalisco, Michoacán and Baja California continue to be the main raspberry-producing States, accounting for 97.8% of national production between

Although Michoacán stands out in terms of yields with 25.5 t/ha, followed by Guanajuato with 19.8 t/ha, which has only 112 ha of this crop. At the municipal level, Jocotepec, Jalisco, led in production, with 29.1% of national production.

At the national level, most of the production takes place in a macro tunnel, where a slightly higher yield is obtained compared to open sky production. A point to highlight is that organic production is minimal, so there is a great opportunity in this regard, being the main challenge to increase the yield of organic production, through proper control of pests and diseases of economic impact.

As for production throughout the year, from July to September it is practically null, beginning in the fall and having its highest peak of the season towards the end of the year, with another smaller peak in late spring and early summer. Domestic exports also show these two peaks, as production and foreign trade are aligned to meet the demand of the USA market at times when weather conditions in the main production areas of the USA make production difficult.

Something to keep in mind is that by the end of the year raspberry prices decrease considerably, derived from a considerable increase in production, so in the following years it might be necessary to start reducing the winter production peak, distributing some fruit before and after it.



There are many producers who work hard to achieve the necessary quality, get a customer and meet the export requirements, however, we know the typical story of the producer who exports and his customer does not pay him, with the impossibility of acting legally in his country, so producers also need to have a legal and financial structure to protect them.

For this reason, the alliance between **ProducePay** and **Treembo** seeks to connect producers interested in exporting to the USA market with potential clients, financial structures and certifying agencies.

Daily Market Report

If you want to be updated with the prices of raspberry in the USA market, subscribe for free to the **Daily Market Report** offered by ProducePay, in which you will also find information on many other agricultural products.



Clic here

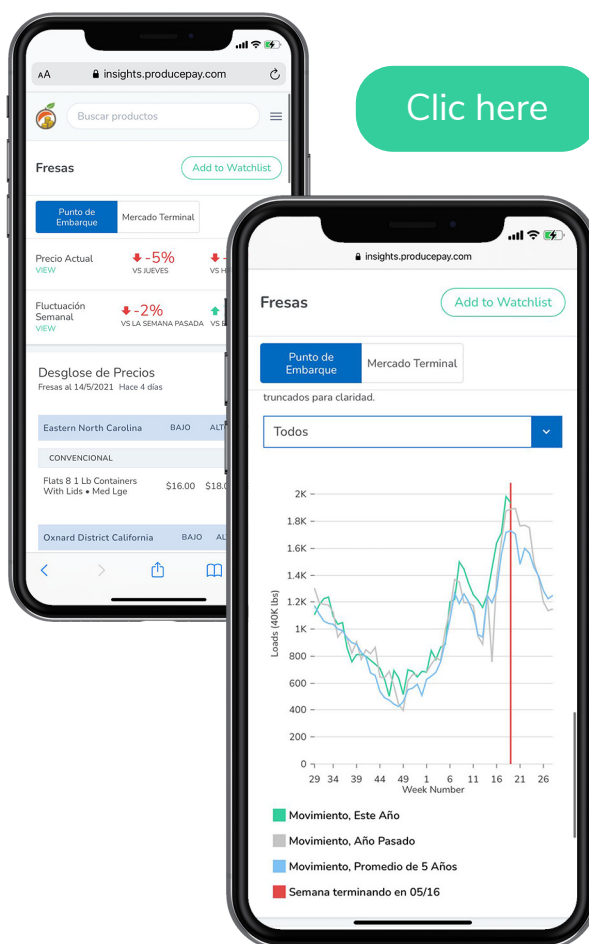


Harvest map

If you are a raspberry producer, remember that in **Treembo** you can place your crop on our agrifood map, so you can find technical advisors, input suppliers, potential buyers, news and more. Register for free.



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Worldwide production



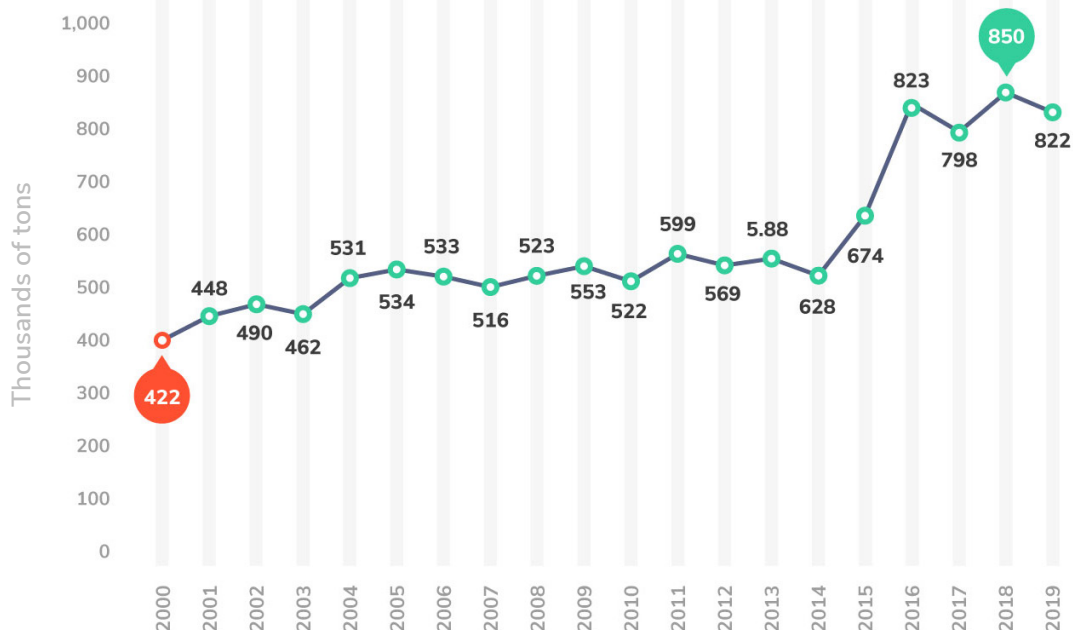
Historical world production

The latest year with global raspberry production data is 2019, in which 822,493 t were produced, which meant a decrease of 3.3% compared to the previous year. Despite this, during the last decade (2010-2019) production had an average annual growth of 4.4%, derived mainly from the increase between 2015 and 2016, when production increased by 22.0%

Between 2018 and 2019 the harvested area presented an increase of just 1.2%, while the average yield presented a decrease of 4.4%, which explains the slight drop in world raspberry production, despite that small increase in harvested area, leaving the yield at 11.1% below the best year in this section, which was 2016.

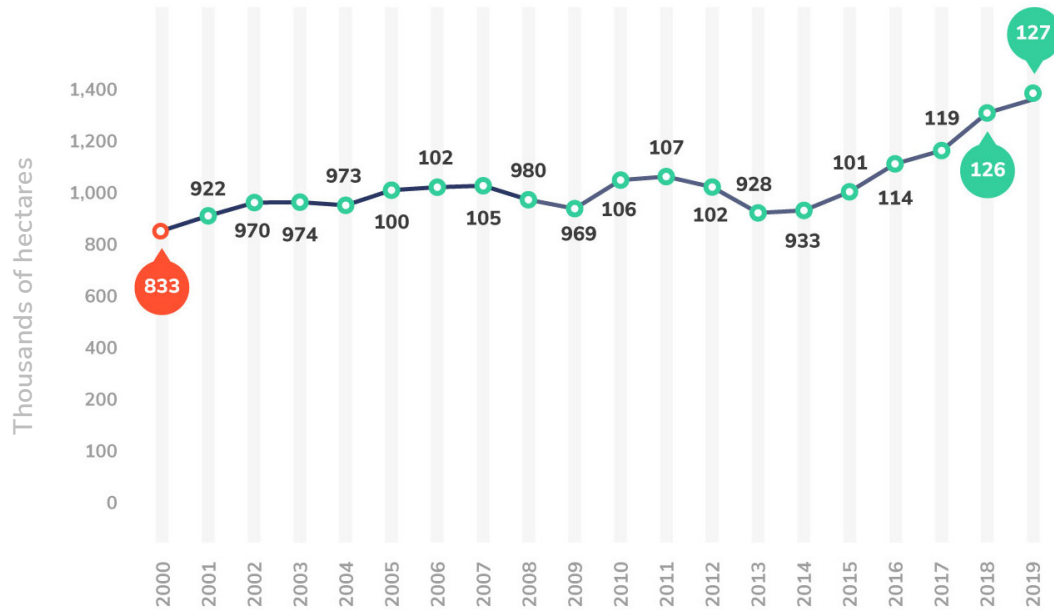
Production of raspberries in the world (2000-2019)

Source: FAOSTAT



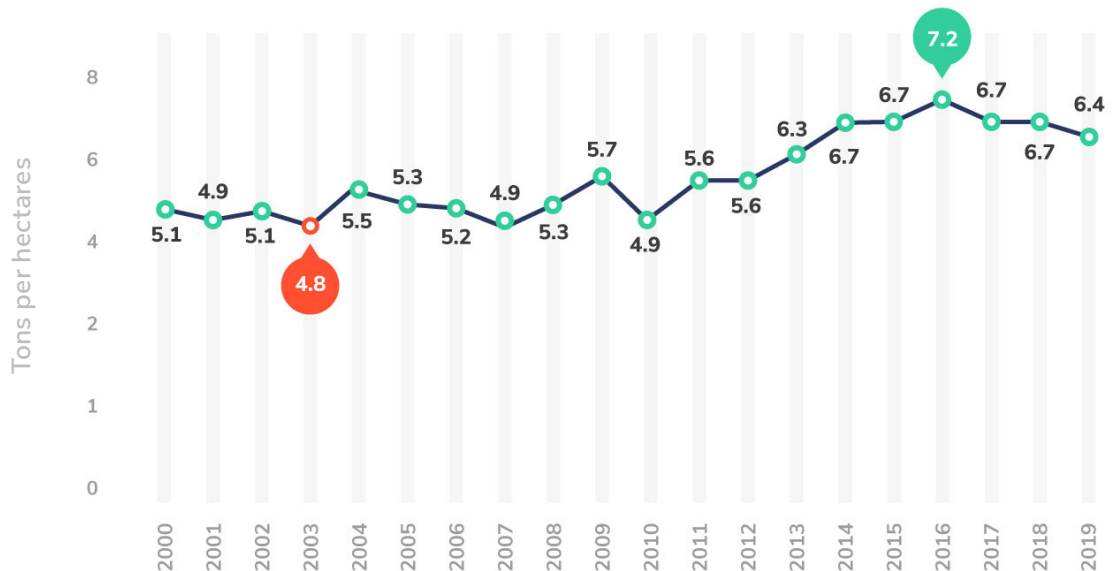
Raspberry harvested area in the world (2000-2019)

Source: FAOSTAT



Average raspberry yields in the world (2000-2019)

Source: FAOSTAT



Graph 1: In 2015 production started to increase and in 2016 the increase was considerable, with a growth of almost 2 million tons during these 2 years. Peak production occurred in 2018.

Graph 2: During the period from 2010 to 2014 the harvested area had an average annual decrease of 0.6%, while between 2015 and 2019 the figure was positive, with an average annual increase of 6.5%.

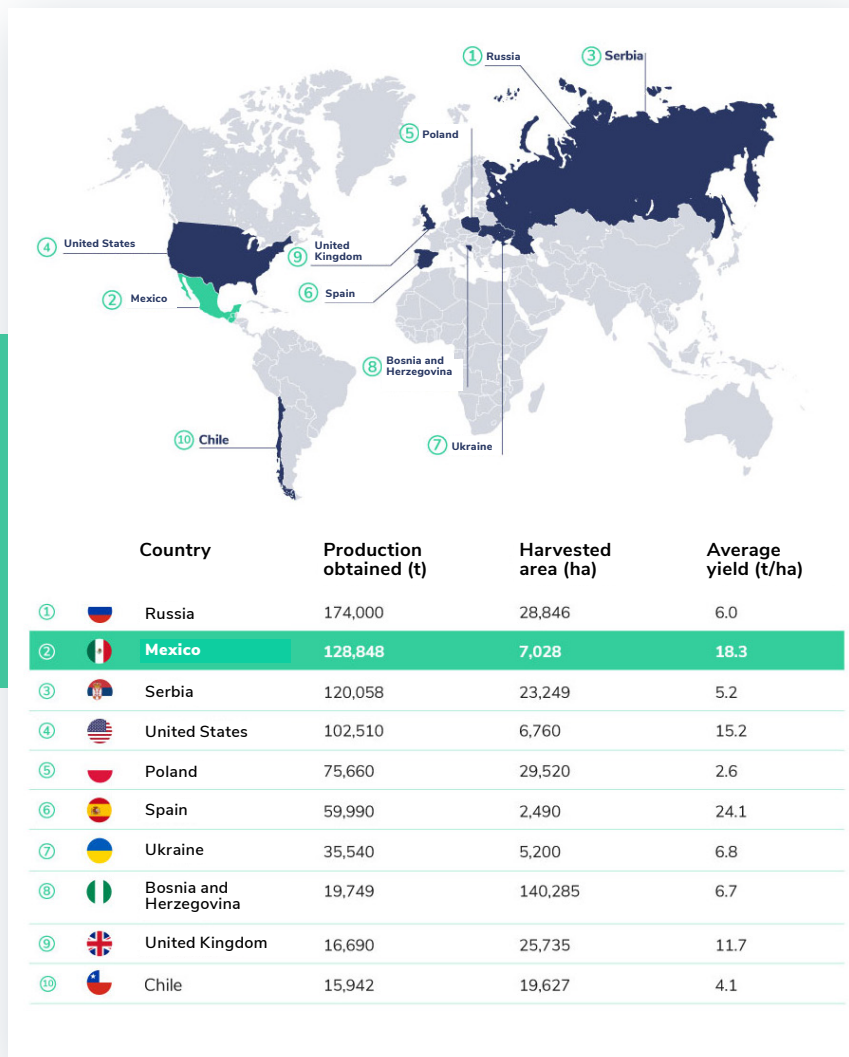
Graph 3: Between 2000 and 2019 there was a steady increase in global yields, from 5.1 to 6.4 t/ha, with an average annual increase of 5.7% during this period.



Raspberry producing countries

Main raspberry producing countries in 2019

Source: FAOSTAT



It is important to note that, although Mexico had only 24.4% of the harvested area that Russia had, its production was equivalent to 74.1% of Russia's production, basically because the yield of this crop in Mexico is 3.1 times higher than in Russia, with 18.3 t/ha, and only behind the yield of Spain, which had 24.1

Of the raspberry producing countries, Russia stands out, with 21.2% of the world total, while the second and third positions are occupied by Mexico and Serbia, with 15.7% and 14.6%, respectively. Mexico has the third highest yield

of this berry (18.3 t/ha), only behind Spain (24.1 t/ha) and Switzerland (19.8 t/ha). Poland is the country with the largest area harvested of raspberries, with 23.1% of the world total.













**Foreign
market**



Raspberry exporting and importing countries











Main raspberry exporting countries in 2020

Source: TRIDGE

Pos.		Country	Million Dollars	Percentage
①		Spain	515	22.5
2		Mexico	447	19.5
③		United States	346	15.1
④		Morocco	307	13.4
⑤		Portugal	242	10.6
⑥		Netherlands	210	9.2
⑦		Germany	42	1.8
⑧		Belgium	42	1.8
⑨		Poland	27	1.1
⑩		South Africa	17	0.7

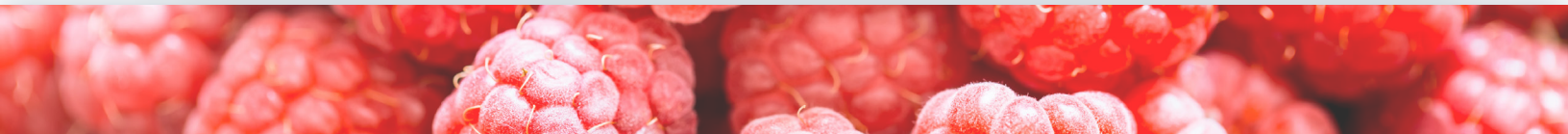
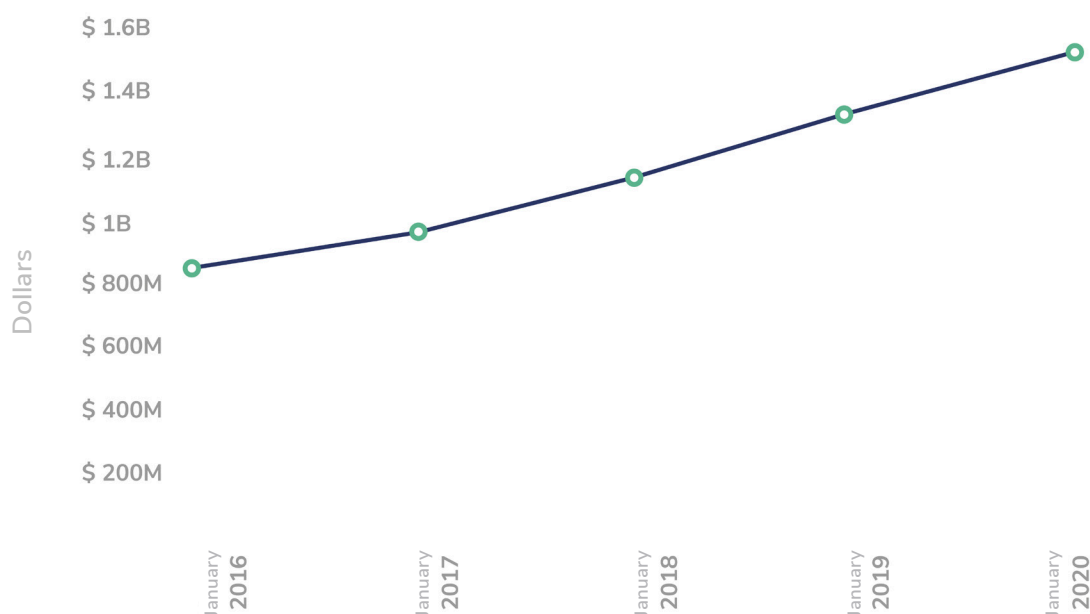
Main raspberry importing countries in 2020

Source: TRIDGE

Pos.		Country	Million Dollars	Percentage
①		United States	1,530	45.8
②		Canada	321	9.6
③		Germany	310	9.3
④		United kingdom	280	8.4
⑤		Spain	223	6.7
⑥		Netherlands	179	5.3
⑦		France	93	2.8
⑧		Switzerland	44	1.3
⑨		Italy	44	1.3
⑩		Belgium	42	1.2

Raspberry exports from Mexico to the United States

Source: USDA Border Crossing Data



Raspberry exports from Mexico to the United States (2021)

Source: USDA Border Crossing Data

TOP HS CODES

HS Codes	Total (USD)	% Change	\$ Change	Behavior
0810.20	\$1,659,283,992	63%	\$163,433,740	

TOP IMPORTERS










Country	Region	Total (USD)	% Change	\$ Change	Behavior
United States	North America	\$1,659,283,992	63%	\$163,433,740	

TOP EXPORTERS

Country	Region	Total (USD)	% Change	\$ Change	Behavior
Mexico	Central America	\$1,659,283,992	63%	\$163,433,740	

Raspberry supplier companies (2021)

Source: USDA Border Crossing Data

	Company	No. of shipments	Shipping weight (kg)
①	 Driscoll S Operaciones SA De Cv	1,929	71,329,2187
②	 Mainland Farms S.A. De C.V.	250	12,216,5280
③	 Sun Belle Mexicosa De C.V.	1,094	72,891,641
④	 Berries Paradise S.A.P.I. De C.V.	2,808	51,606,098
⑤	Meridian Fruits S. P. R. De R. L.	1,102	41,530,715
⑥	 Giant Berry Farms De Mexico S.De R.L. De C.V.	290	40,026,107
⑦	 Hortifrut SA De C.V.	1,064	37,043,640
⑧	 Sunnyridge Farm Mexico S.A. De C.V.	593	36,333,689
⑨	 Rancho Nuevo Produce S.A. De C.V.	246	29,837,963
⑩	 H52 Mexico S.A. De C.V.	3,090	28,99,1246





Raspberry selling companies (2021)

Source: USDA Border Crossing Data

	Company	No. of shipments	Shipping weight (kg)
	Red Blossom Sales Inc.	152	88,929,704
	Sun Belle Inc.	1035	58,317,565
	Andrew & Williamson Sales Co. Inc.	596	37,187,901
	Berry Fresh LLC	1789	35,193,352
	California Giant Inc.	248	30,827,963
	Meridian Fine Foods LLC	648	29,55,3854
	Northbay Produce Inc.	1526	26,913,058
	Alpine Fresh	1676	25,019,338
	Always Fresh Farms	289	18,766,620
	Hortifrut Comercial S.A	489	18,337,325

Raspberry volumes entering the US market*

Source: USDA AMS

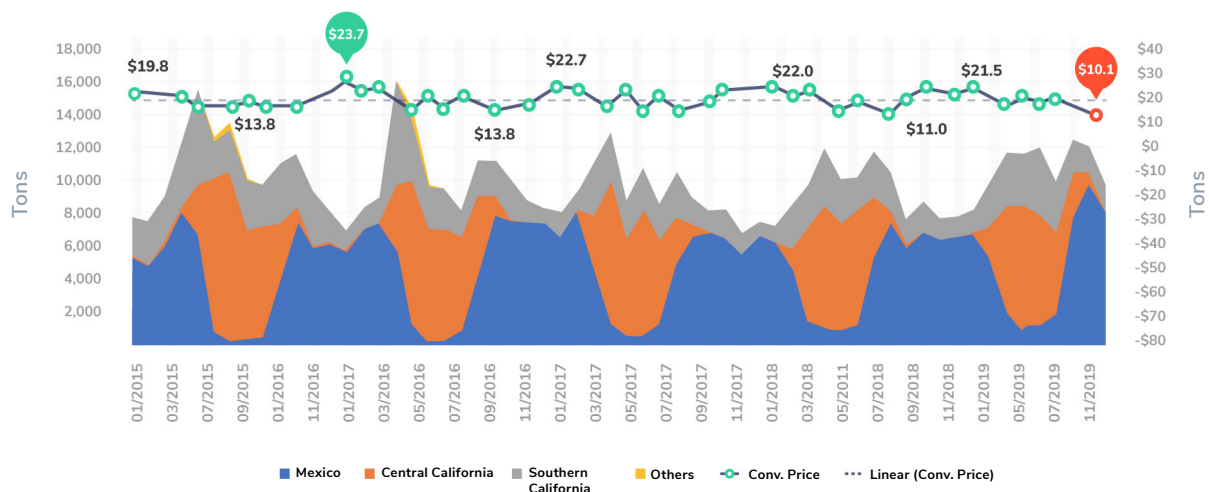
	2015	2016	2017	2018	2019	2019 vs 2015		
						Tons	%	% part 2019
Mexico	49,224	54,740	56,468	52,626	63,612	14,388	29%	53%
Central California	41,064	36,887	32,958	31,588	30,296	(10,768)	-26%	25%
Southern California	37,168	28,649	23,986	24,830	26,903	(10,265)	-28%	22%
Others	658	1,021	136	59	-	(658)	-100%	0%
Total	128,114	121,296	11,549	902,254	120,811	(6,822)	-6%	100%

* Conventional and organic, all varieties, all crossings and points of shipment, all packaging types

In recent years, Mexico went from competing against the United States, with a smaller or similar percentage of the market, to obtaining more than 50% of the market share in this country.

Raspberry volumes and prices by month in the US market*

Source: USDA AMS



* Conventional product prices, packaging flats 12 6-oz cups with lids, all origins and sizes. Conventional and organic product volumes, all origins, packaging and sizes.



**Domestic
production**





Raspberry production in Mexico



Mexico is the world's second largest raspberry producer with 128,848 tons.

In 2019 its share of national fruit production was 0.5%.

The growing domestic and global demand for this berry has driven the increase in domestic production, which made significant leaps in 2015 and 2016, thanks to the increase in harvested area, which from 2015 to 2020 averaged 24.9% annually, in addition to the fact that domestic yields have remained above 18 t/ha since 2016.

The average price per ton decreased from 2019 to 2020 by 11.3%, possibly derived from trading complications due to the situation generated by COVID-19, which implied a decrease in production value of 7.8%.



Raspberry production in Mexico

Source: SIAP



The demand for raspberries in the world over the last 9 years is equivalent to 7 times its production, so new marketing channels must be explored to reach consumers.



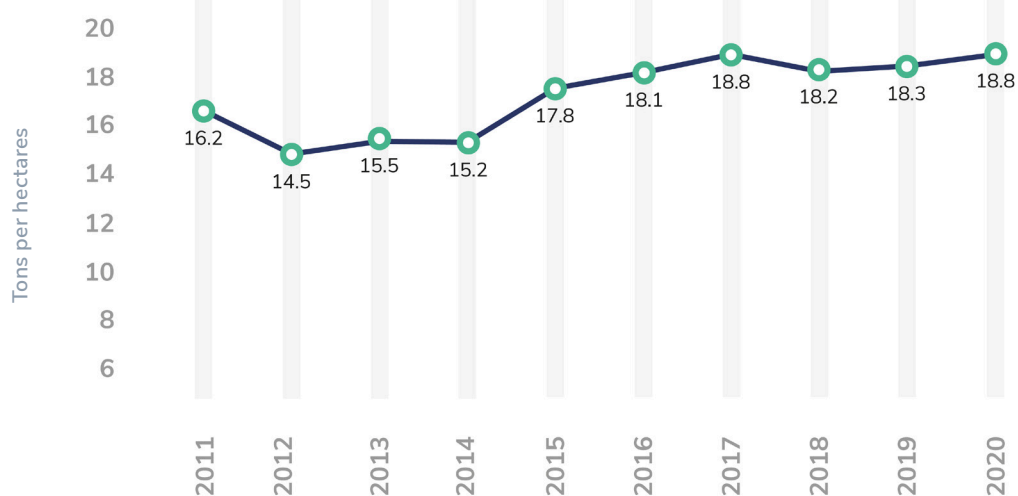
Harvested area of raspberries in Mexico

Source: SIAP



Average raspberry yield in Mexico

Source: SIAP



Average price of raspberries in Mexico

Source: SIAP

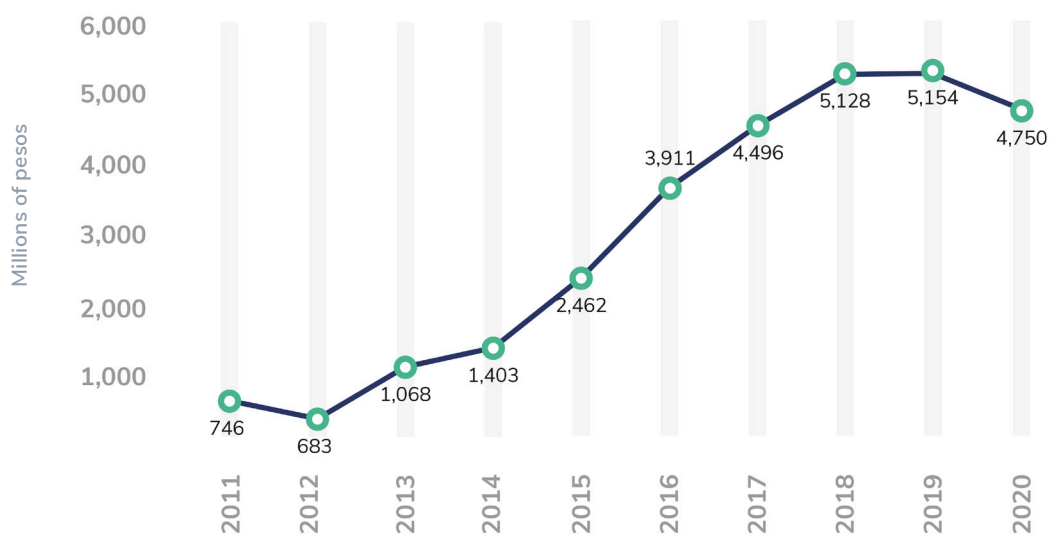


The price per ton has been relatively stable in recent years, although it was lower in 2020, which could be due to lower consumer purchasing power.



Value of raspberry production in Mexico

Source: SIAP



The value of the national production of this crop decreased considerably in the last year, which could be due to commercial complications due to the COVID-19 pandemic, or also to the fact that a readjustment of production is already necessary to avoid such marked peaks, distributing the harvest over more months.



Raspberry producing States in Mexico

Raspberry producing states in 2020

Source: SIAP

	State	Production obtained (t)	Harvested area (ha)	Average yield (t/ha)	Production value (million pesos)
①	 Jalisco	104,080	5,659	18.4	2,319
②	 Michoacán	28,895	1,134	25.5	1,450
③	 Baja California	10,222	765	13.4	853
④	 Guanajuato	2,220	112	19.8	102
⑤	 Puebla	795	77	10.3	23
⑥	 México	85	15	5.9	2
⑦	 Colima	26	2	14.6	1
⑧	 Tlaxcala	18	1	17.8	1

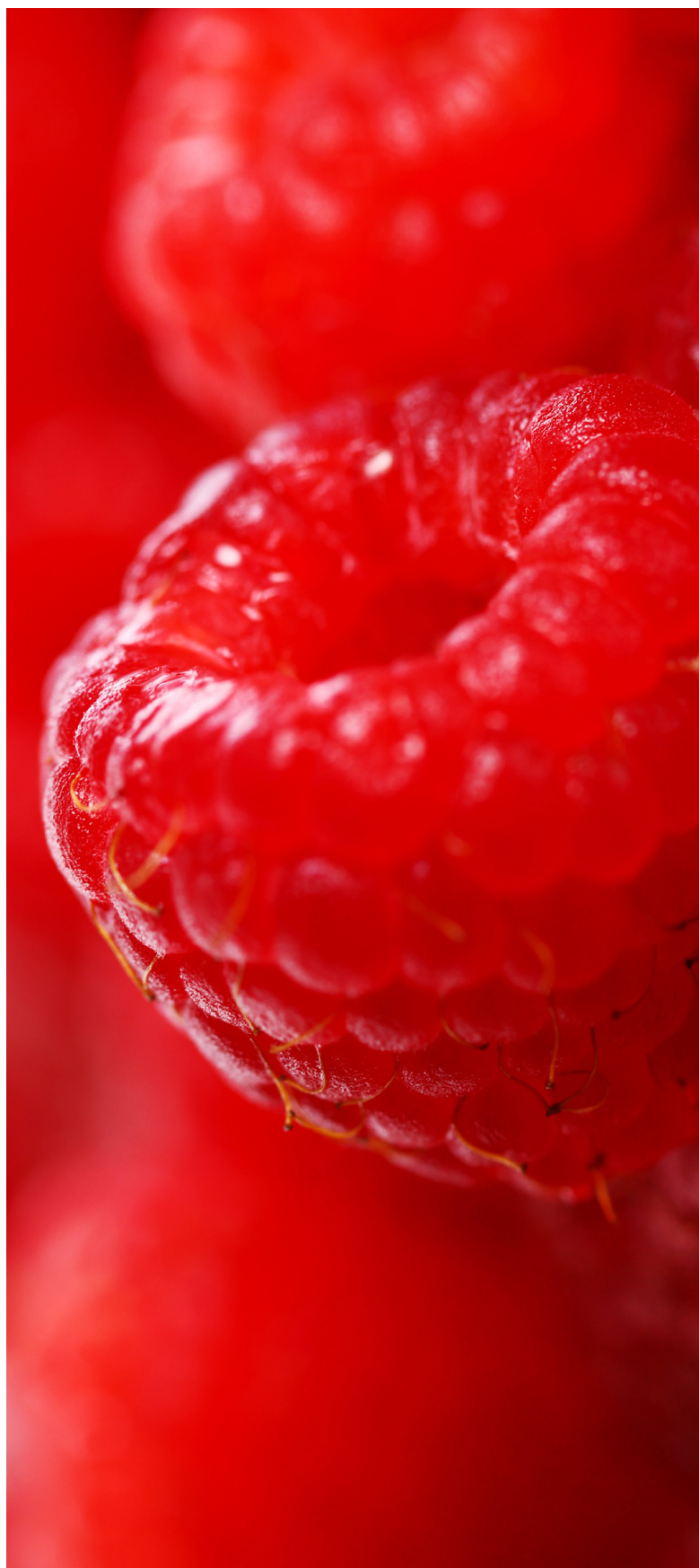
The states with the highest raspberry production in 2020 were Jalisco (71.1%), Michoacán (19.7%) and Baja California (7.0%); for this year there were 8 states in which raspberries were produced. In terms of yield, Michoacán stands out with 25.5 t/ha.

Raspberry-producing municipalities in Mexico

Of the 10 municipalities with the highest production in 2020, 6 belong to Jalisco and were Jocotepec, Zapotlán el Grande, Tuxcueca, Zapotiltic, Tuxpan and Tizapán el Alto, while the other 3 belong to Michoacán and were Zamora, Tangancícuaro and Jacona, and the remaining one was Ensenada, Baja California. It is noteworthy that Jocotepec represented 29.1% of total national production and Zapotlán el Grande 21.4%. A total of 49 municipalities reported raspberry production in 2020.

Domestic production breakdown

The breakdown of raspberry production in Mexico during 2020, by production technology, type of production and destination market, indicates important areas of opportunity that domestic farmers, with government support, could begin to take advantage of, in order for the production and trade of this crop to become more strategically important for the country.



Raspberry production technologies in Mexico during 2020

Source: SIAP

Technology	Production obtained (t)	Area harvested (ha)	Area yield (t/ha)	Production value (million pesos)
Macro tunnel	124,400	6,457	19.3	3,359
Open sky	21,111	1,263	16.7	1,359
Greenhouse	801	44	18.2	31
Shade netting	38	2	15.6	1

In 2020, 70.7% of raspberry production in Mexico was in macro tunnel, while open sky was 28.6%. In addition, it should be noted that the national average yield of macro tunnel production was 13.5% higher than the yield of open sky production, indicating the profitability of investing in a protective structure.



Types of raspberry production in Mexico during 2020

Source: SIAP

Production	Production obtained (t)	Area harvested (ha)	Average yield (t/ha)	Production value (million pesos)
Conventional	144,547	7,597	19.0	4,609
Organic	1,803	170	10.6	141

The 98.8% of the production was conventional, which indicates the existence of a business opportunity for those farmers willing to enter the organic business, especially because the average price was \$31,884/t for conventional and \$78,464/t for organic, although clearly the biggest challenge is to improve yields, since in conventional, 79.2% more fruit was obtained on average than in organic.

Raspberry production markets in Mexico during 2020

Source: SIAP

Market	Production obtained (t)	Area harvested (ha)	Average yield (t/ha)	Production value (million pesos)
Domestic	72,516	4,172	17.4	2,099
Export	73,834	3,595	20.5	2,651

There is an interesting balance regarding the markets for which raspberries are produced in Mexico, with 50.5% for export and 49.5% for domestic, although the production yield for export is 15.1% higher than for domestic, so a higher production value is obtained in fewer hectares.

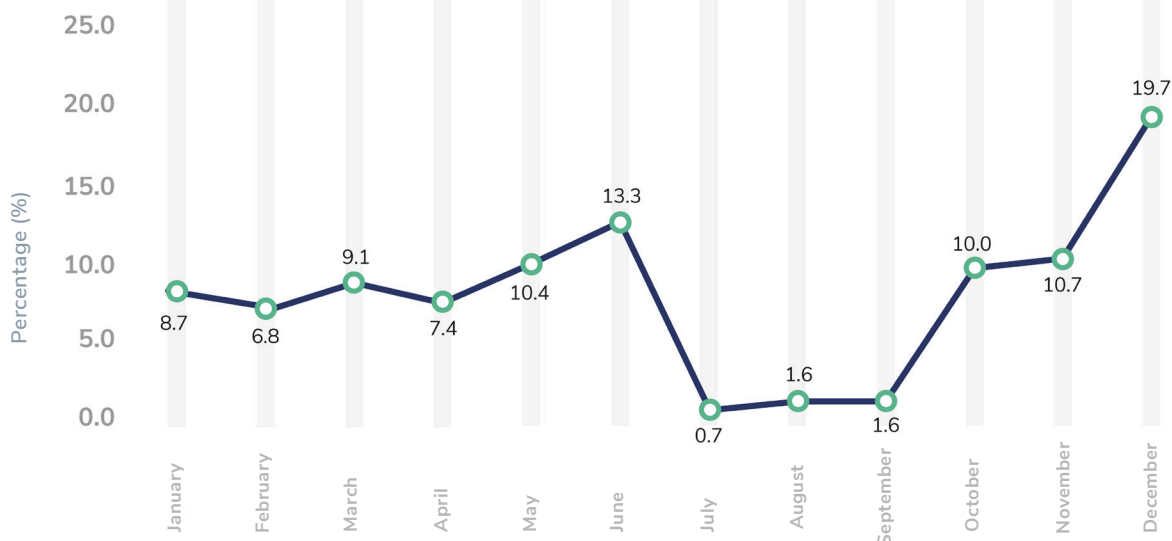


Monthly domestic production

In Mexico, the raspberry season begins in early fall, with its highest peak in late fall and early winter, maintaining a certain volume until spring, and with a final rebound in the months of May and June, just before the close of the season.

Monthly raspberry production in Mexico during 2019

Source: SIAP



According to the Panorama Agroalimentario 2020, the annual per capita consumption of raspberries in Mexico was just 300 g in 2019, so there was a decrease of 40.0% compared to 2018, when it stood at 500 g.



Business opportunities

Most of the domestic raspberry production for export is sent to the United States, so there is a risk that at some point the USA government, urged by its producers, may want to establish a trade blockade to favor domestic production.

It is not impossible for something like this to happen, and if it does, then the problem for Mexican producers will be that they have not worked on other markets that can absorb a good part of the amount of fruit sent to the United States, so they should look for these new markets now, so that marketing can be diversified.

And the other great business opportunity is to produce organically, since prices are much higher compared to conventional production, in addition to the fact that competition at the national level is practically non-existent.

Of course, organic production requires a change in the farmers' mentality, since an integral production system must be implemented, given that the pesticides that commonly help to save the crop in the case of conventional production cannot be used.



In the matter of international trade, SIAP's Panorama Agroalimentario 2020, with information from 2019, indicates that Mexico's main importer is the United States, whose imports translated into 891,597 million dollars in income.

Other countries to which raspberries were shipped from Mexico were:



Canada



Netherlands



United Arab Emirates



Russia



Japan



Saudi Arabia



Belgium



Hong Kong



Ireland



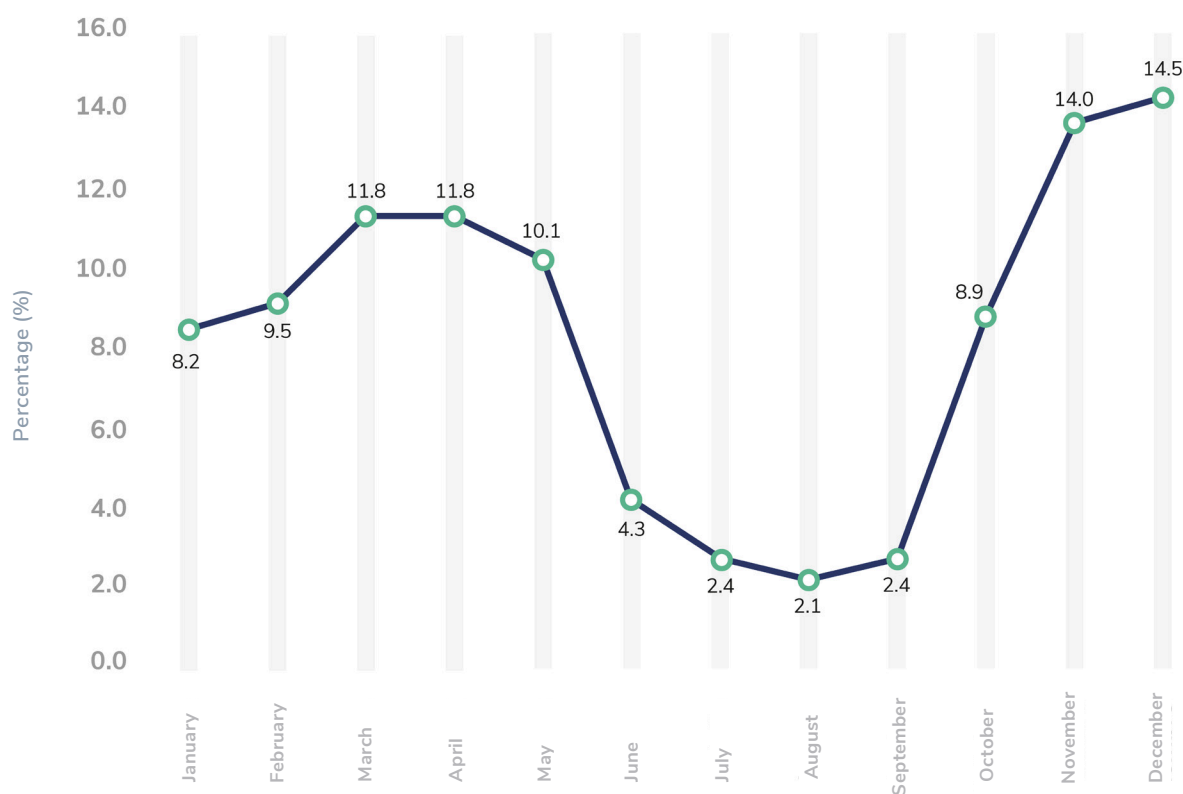
Kuwait

Exports from Mexico occur mainly in late fall and early winter, as well as during the spring, because the United States does not have considerable production at this time, and the United States is the main destination for Mexican exports.



Monthly raspberry exports from Mexico during 2019

Source: SIAP

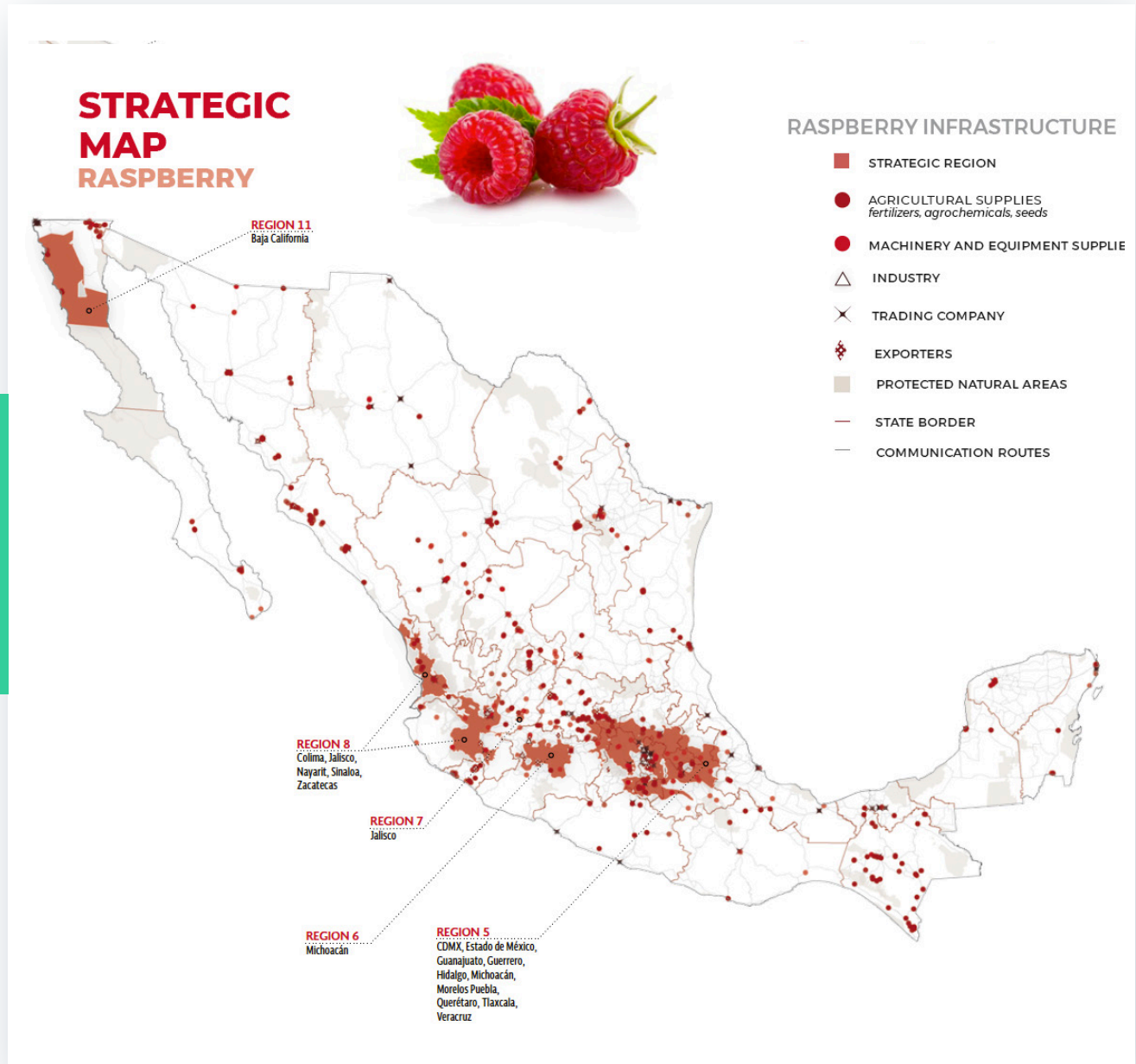


For its part, Mexico imported 157 t of raspberries in 2019, compared to the 85,915 t exported in the same year. Imports were from the United States, Serbia, Chile, France, Ukraine, Spain and Germany.

Strategic map

Strategic raspberry regions in Mexico

Source: SIAP



Of the 5 regions where raspberries are produced, 4 of them are part of the "Potential Region", which would be the following (Region 5, 6, 7 and 8).



Price trends



USA raspberry prices

Source: PRODUCEPAY

	January	February	March	April	May	June	July	August	September	October	November	December	Average
2016	\$10.3	\$17	\$20.4	\$19.5	\$15.7	\$13.7	\$11.4	\$11.4	\$15.1	\$12.1	\$12.8	\$14.1	\$13.5
2017	\$14.8	\$17.5	\$18.5	\$20	\$18.4	\$15.1	\$15.1	\$11.5	\$11.3	\$11.3	\$8.6	\$16.6	\$14.8
2018	\$18.4	\$17.3	\$17.5	\$19.4	\$16.1	\$13.7	\$14.5	\$14	\$15.1	\$11.9	\$9.5	\$8	\$14.6
2019	\$15.8	\$18.1	\$17.7	\$8.9	\$14.7	\$10.3	\$15.3	\$15.3	\$13.7	\$13.2	\$11	\$8.4	\$13.5
2020	\$13	\$19.4	\$17.8	\$16.4	\$16.6	\$11.5	\$19	\$15.8	\$15.5	\$15.4	\$12	\$8.5	\$15
2021	\$11.1	19.4	\$20.5	\$22	\$20.9								\$18.7
	\$13.9	\$18.1	\$18.7	\$17.7	\$17	\$12.8	\$15.1	\$13.6	\$14.4	\$13.3	\$12.7	\$10.7	\$12.5





Articles

Adelita organic raspberry adapts well in Mexico

Source: FRESH PLAZA

The raspberry season in Mexico is in full swing and is expected to last through mid-July. In recent years, North Bay Produce and its producing partners have worked hard to transition from conventional to organic varieties and, as a result, 30% of the company's raspberry volume is organic.

"We work with the Adelita variety, developed in Spain by breeder Planasa," says Ryan Lockman of North Bay. "It's a club variety with good appearance, shelf life, size and flavor." Adelita is well adapted to Mexico's climate and altitude. "As a result, we are able to produce a great tasting organic raspberry." Adelita's plant life is only three years and it achieves the highest yield during the first year. Overall, club varieties have become very common in raspberries and have been imperative to the growth of the category worldwide.

This year, demand for organic berries seems to continue its upward trend. *"Every year, we see an increase in our organic products across the board and raspberries are no exception. They are experiencing increases over last year,"* comments Lockman.

The company's raspberries are immediately trucked from the farm to the Mascoutah, Illinois, warehouse outside St. Louis. *"From there, we can ship virtually anywhere in the USA in 24 hours or less,"* he adds. *"Recent logistical problems have been a challenge, but because our warehouses are centrally located in North America, we've been able to keep problems to a minimum."*



Mexico: berry export values remained stable, despite Covid-19

Source: PORTAL FRUTÍCOLA

According to information provided by the National Association of Exporters of Berries of Mexico (Aneberries), the growth of the country's berry industry was maintained, despite the sanitary contingency caused by the Covid-19 pandemic.

According to the association, "although the growth values were a slightly lower percentage, they still show positive numbers".

At the same time, the association stated that they expect that, with the beginning of the new season, "the growth percentages will be regularized".

Regarding the behavior of the markets, Aneberries commented that at the beginning of the pandemic there was a higher demand for fruit, but it decreased in the following weeks with the closing of the food service.

However, "the volume of frozen fruit exports increased". This, together with the increase in the value of the dollar, would have compensated for the slight drop in prices.

Export figures

In terms of figures, Aneberries pointed out that, according to USDA data, during the Mexican production season July 2019 - July 2020, 42,762 tons of blueberries, 74,889 tons of raspberries, 133,510 tons of strawberries and 60,762 tons of blackberries were exported.



The main destination market, as usual, was the United States, with 98% of total volumes, followed by Europe (0.95%), Asia (0.76) and South America/Oceania (0.04).

In view of this, the association pointed out that it plans to continue with the effort to diversify markets. *"Once the current situation has stabilized, Aneberries plans to continue with the development of the Middle East, Asia and Europe,"* they said.

Regarding the pandemic, Aneberries commented that they had problems with transportation outside the continent, due to the fact that commercial flights were affected, so there was *"a significant fee increase"*.

Finally, the association took the opportunity to announce that *"Aneberries has been restructured into three main divisions: Aneberries/fresh; Aneberries/processed or frozen and Aneberries/genetics"*. According to the organization, this is aimed at strengthening the Mexican berry industry and providing a better service to growers.





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RESEARCH, ANALYSIS AND DESIGN



INTERVENTIONS

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