

Fundamental shifts in the U.S. Blueberry market: An overview of production and trade

Zhengfei Guan
A.Malek Hammami
Yi Li

March 6, 2025

UF/IFAS CREC/TREC/Food and Resource Economics



1

Outline

- Surging **deficits** in US ag trade
- Big picture of US ag trade
- Overview of US blueberry market
- **Fundamental Shifts**

2

From surplus to deep deficit

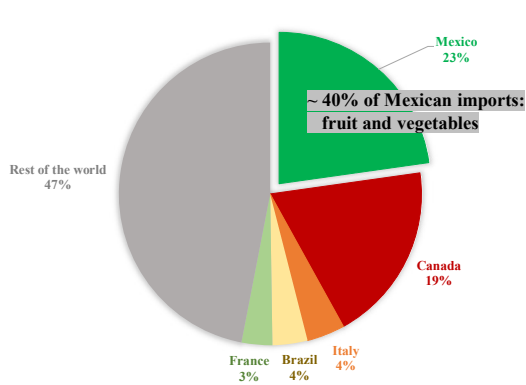


Source: USDA FAS (2025)

3

US ag import and export: origins and destinations

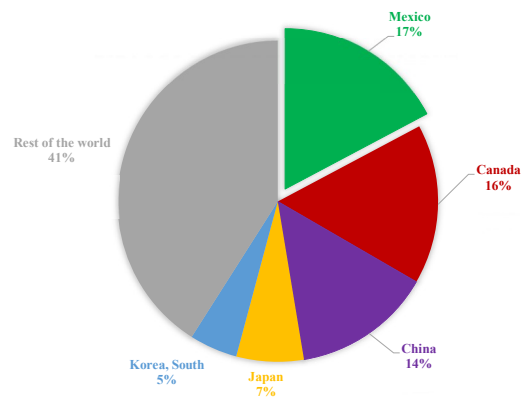
2024 TOP 5 IMPORT ORIGINS



Total Ag. Imports: \$214 B

Source: USDA FAS (2025)

2024 TOP 5 EXPORT DESTINATIONS



Total Ag. Exports: \$176 B

4

From surplus to deep deficit



Source: USDA FAS (2025)

5

Total Ag Trade Breakdown (2022-2024, Billion USD)

	2022			2023			2024		
	Export	Import	Deficit	Export	Import	Deficit	Export	Import	Deficit
US TOTAL	196	199	-3	174	196	-22	176	214	-38
US-Mexico	28	43	-15	28	46	-17	30	49	-19
US-Canada	28	37	-9	28	40	-12	28	41	-13
US-China	38	5	33	29	5	24	25	6	19

6

Top 3 surplus categories traded 2024 (Billion USD)

	Export	Import	Export – Import
US TOTAL	176	214	-38
Oilseeds & Products	37	20	17
Grains & Feeds	38	23	15
Poultry & Products	7	1	6

Source: USDA FAS (2025)

7

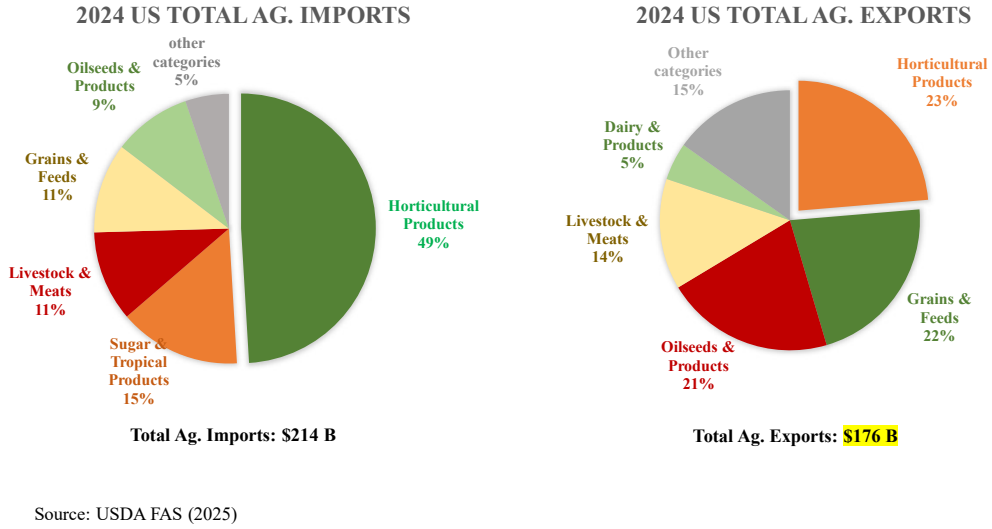
Top 3 deficit categories traded 2024 (Billion USD)

	Export	Import	Export – Import
US TOTAL	176	214	-38
Horticultural Products	42	105	-63
Sugar & Tropical Products	8	31	-24
Tobacco & Products	1	3	-2

Source: USDA FAS (2025)

8

US ag import and export: by category



9

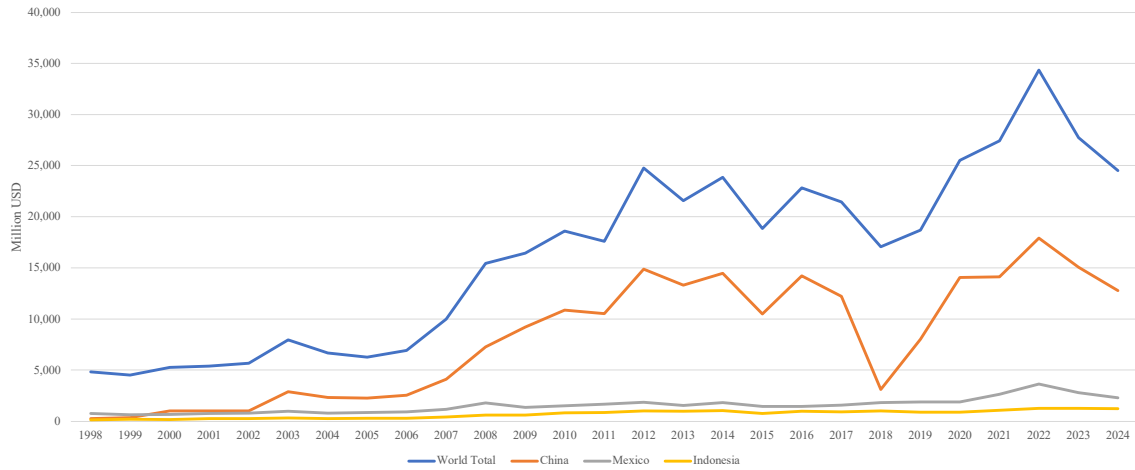
US ag export destinations and trends: Corn



10

US ag export destinations and trends: Soybeans

US Soybean export destinations and trends: Top 3

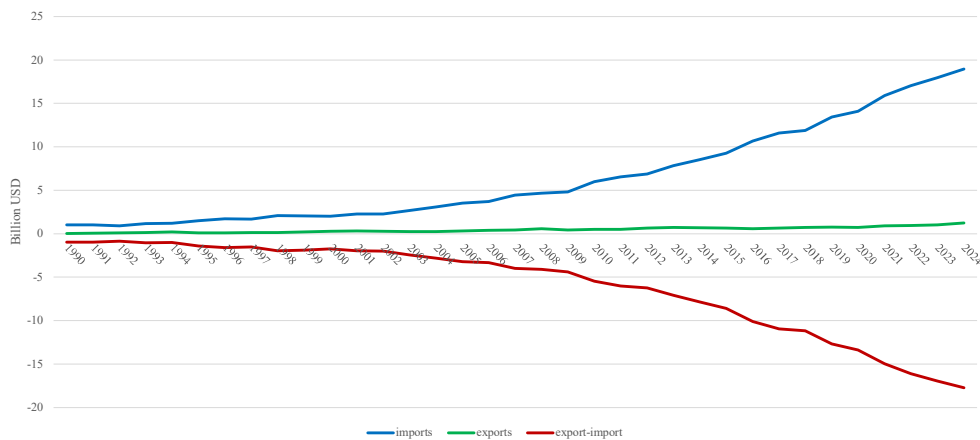


Source: USDA FAS (2025)

11

U.S. fresh fruit and vegetable trade with Mexico

U.S. fresh fruit and vegetable trade with Mexico

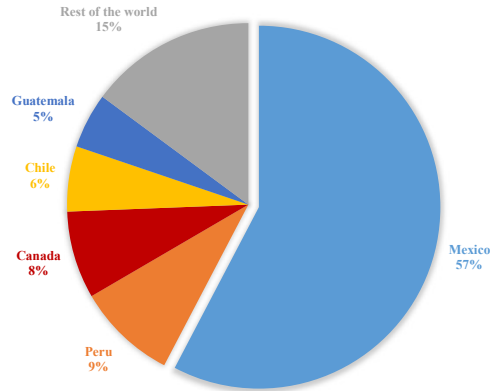


Source: USDA FAS (2025)

12

U.S. fresh fruit and vegetable import origins in 2024

TOP 5 US FRESH FRUITS AND VEGETABLE IMPORT ORIGINS

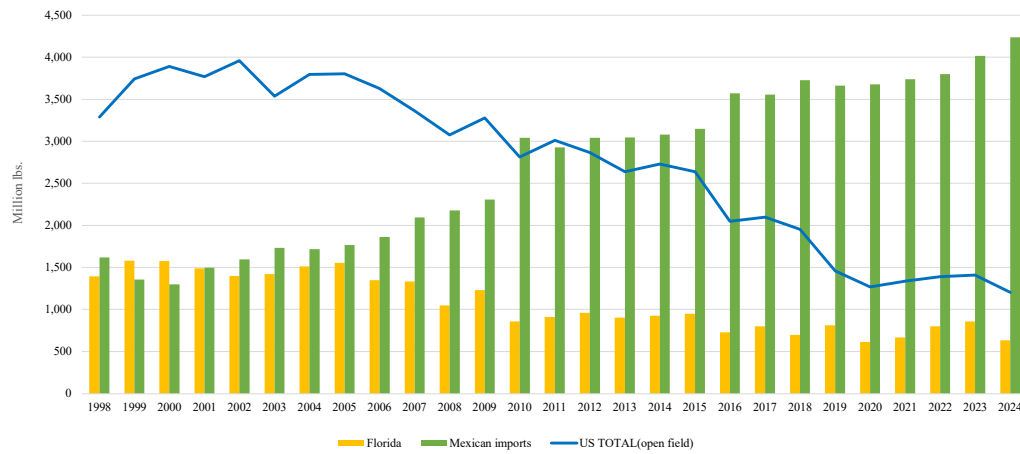


Total imports F&V : **\$32,872** million
 Fresh fruits imports: **\$19,916** million
 Fresh Veg : **\$12,956** million

Source: USDA FAS (2025)

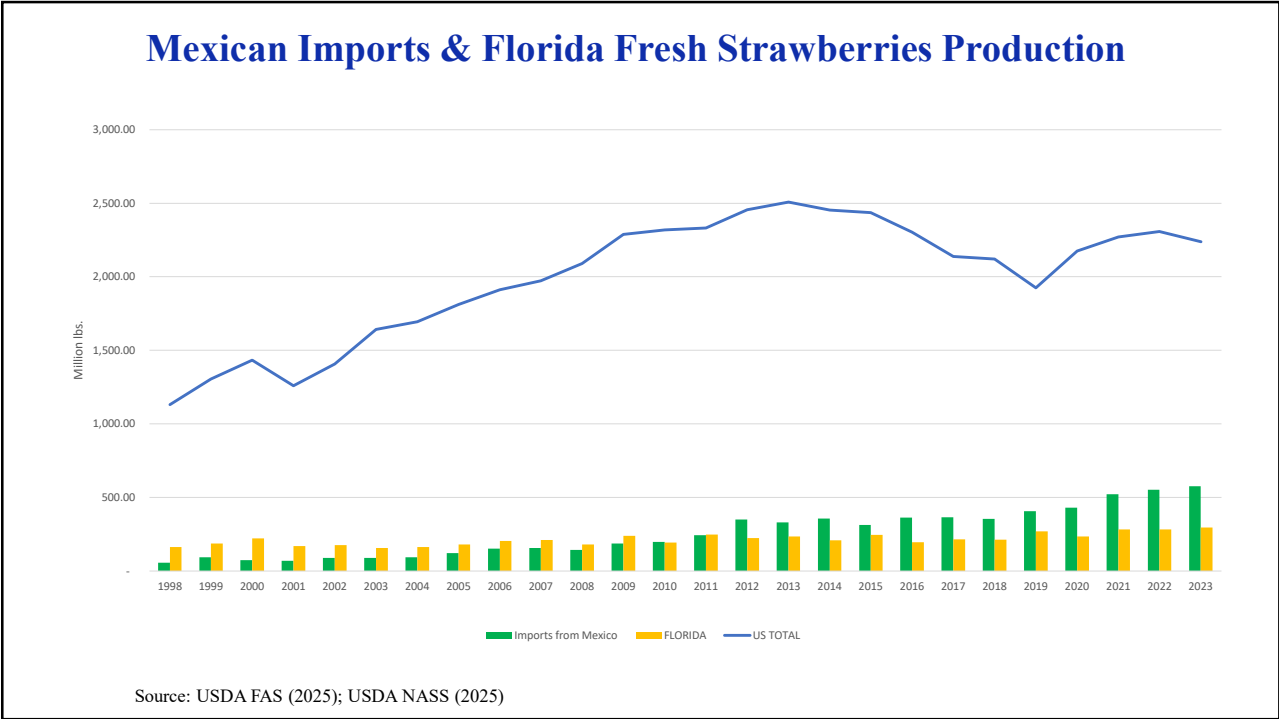
13

Mexican Imports & Florida Tomato Production

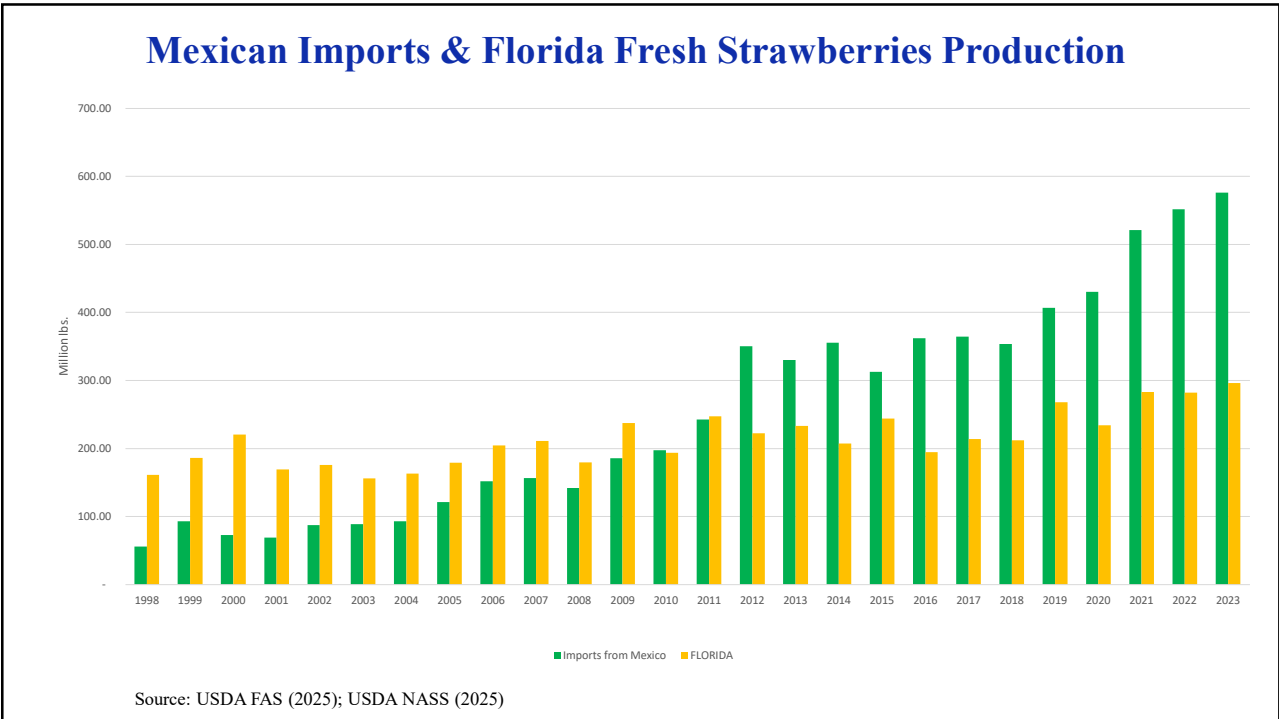


Source: USDA FAS (2025); USDA NASS (2025)

14

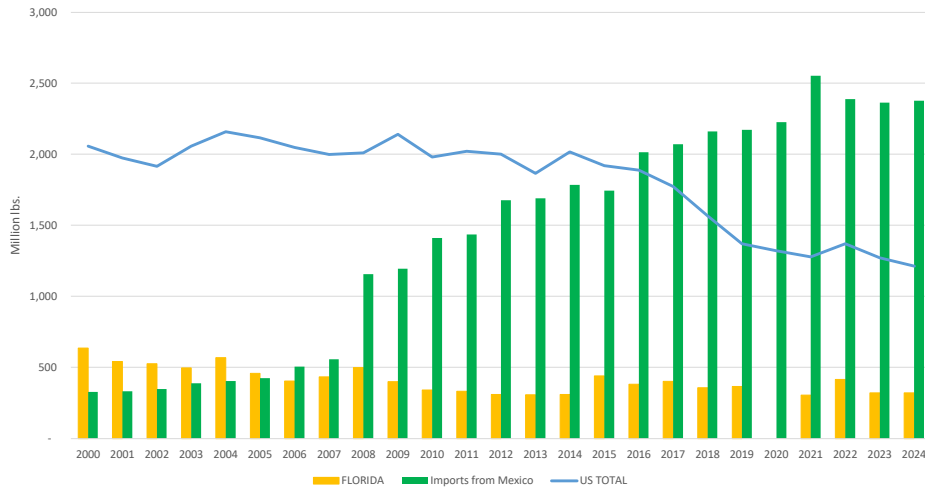


15



16

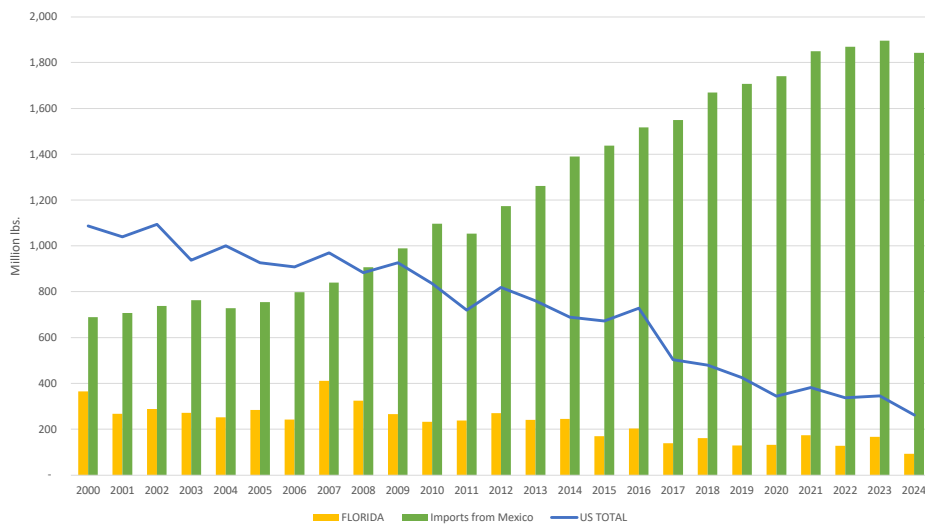
Mexican Imports & Florida Peppers Production



Source: USDA FAS (2025); USDA NASS (2025)

17

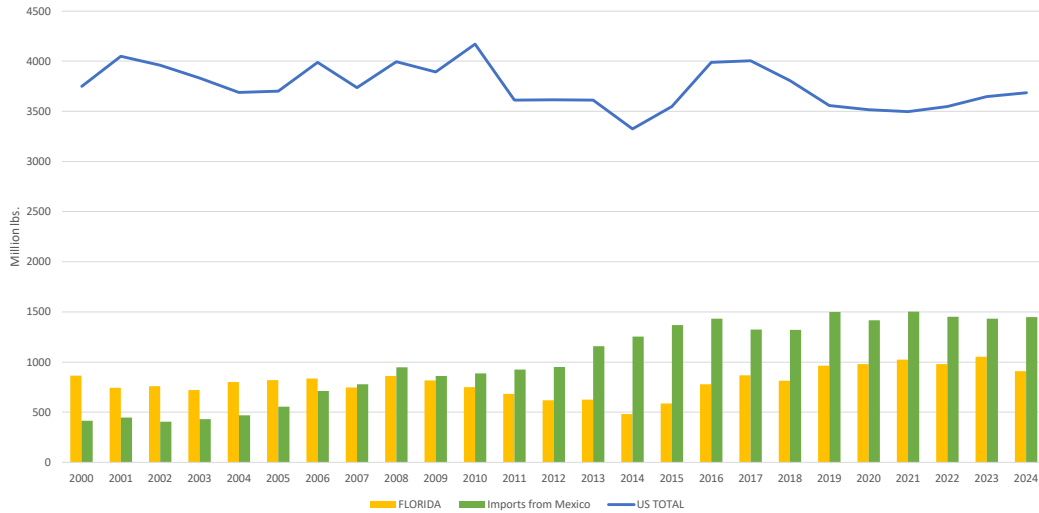
Mexican Imports & Florida Fresh Cucumber Production



Source: USDA FAS (2025); USDA NASS (2025)

18

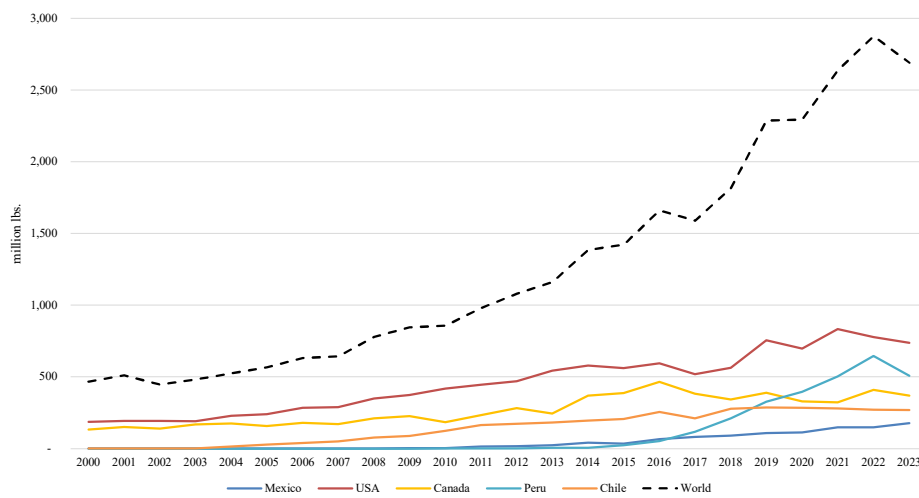
Mexican Imports & Florida Fresh Watermelon Production



Source: USDA FAS (2025); USDA NASS (2025)

19

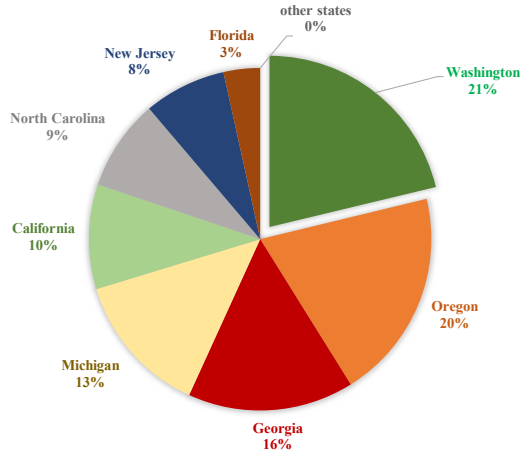
Global Blueberry Production



Source: USDA FAO (2025)

20

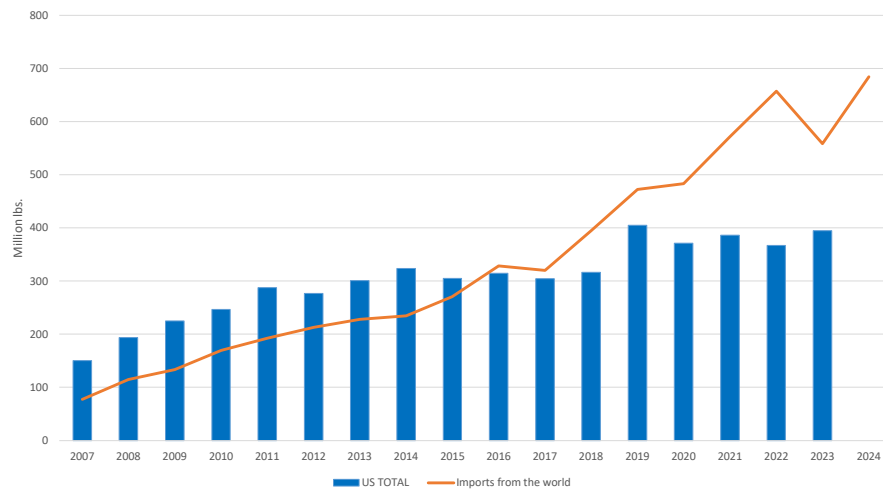
State Shares in Total U.S. Production of Cultivated Blueberries in 2023



Source: USDA FAS (2025); USDA NASS (2025)

21

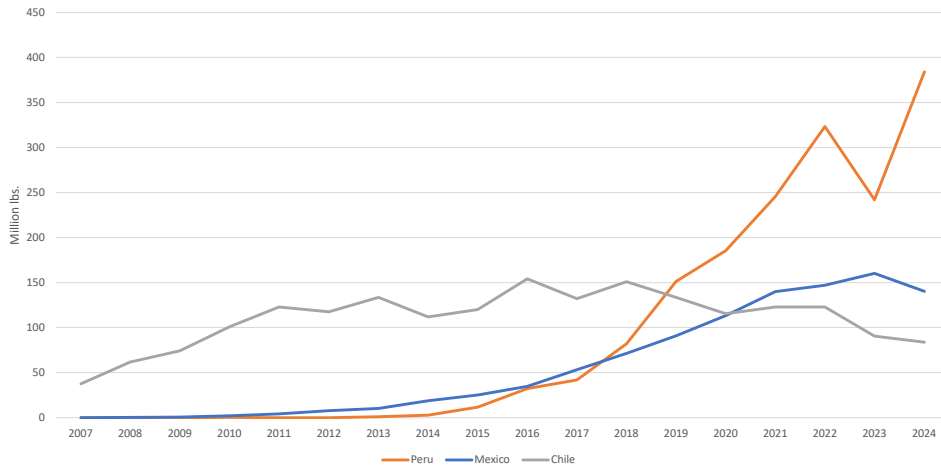
Total Imports & U.S. Fresh Blueberries Production



Source: USDA FAS (2025); USDA NASS (2025)

22

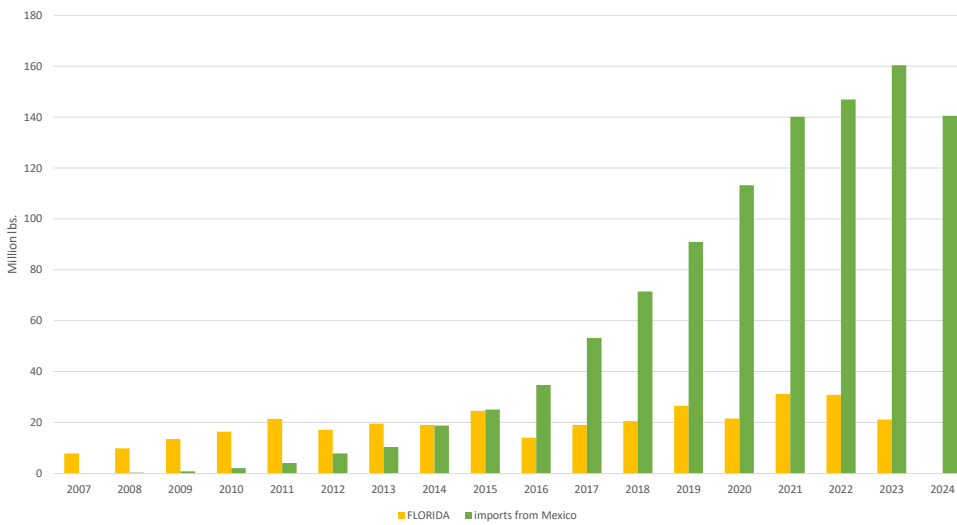
Top 3 U.S. Fresh Blueberries Import Origins



Source: USDA FAS (2025); USDA NASS (2025)

23

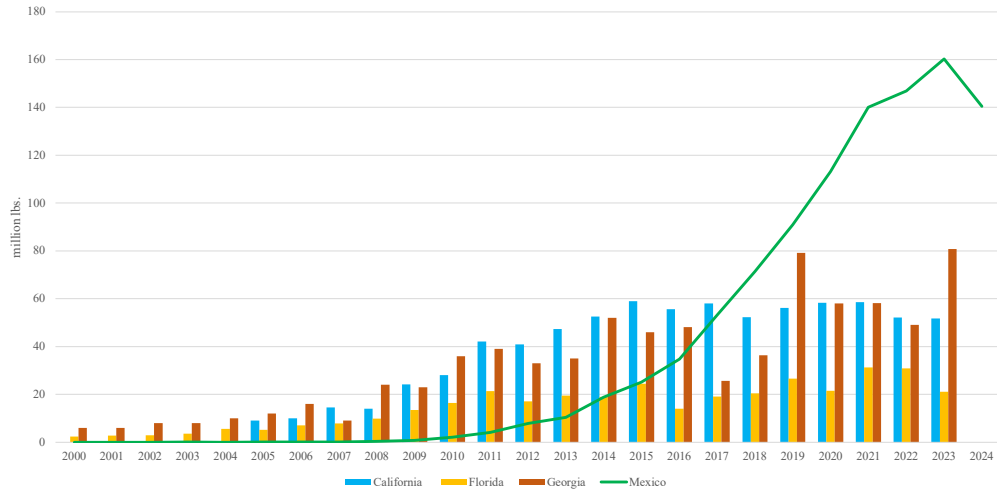
Mexican Imports & Florida Fresh Blueberries Production



Source: USDA FAS (2025); USDA NASS (2025)

24

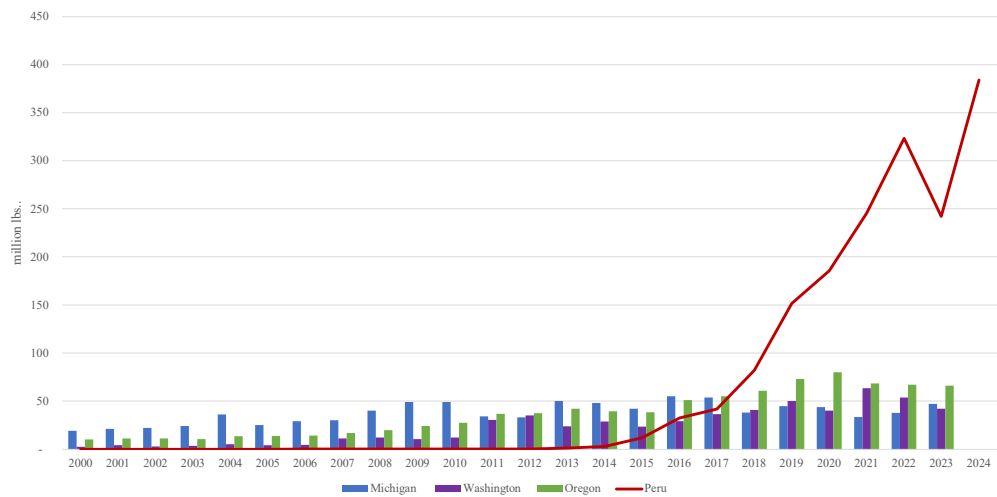
Comparison of Fresh Blueberry Production in Southern States and Imports from Mexico



Source: USDA FAS (2025); USDA NASS (2025)

25

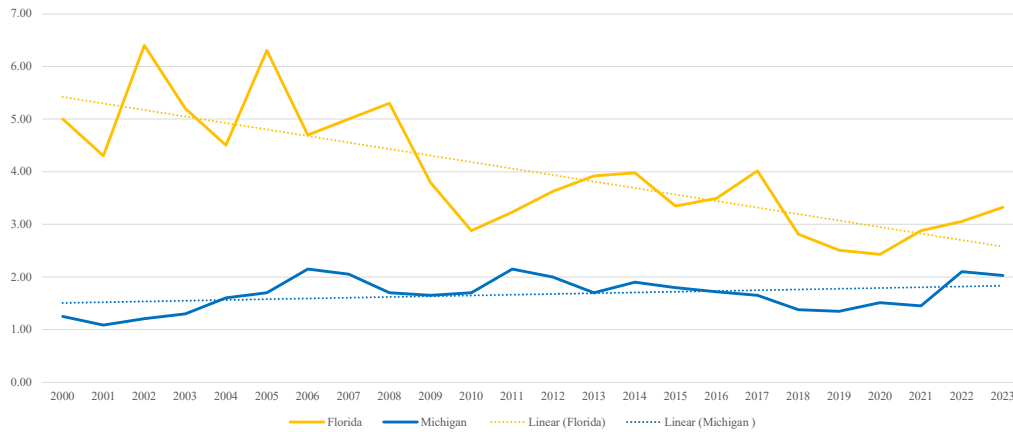
Comparison of Fresh Blueberry Production in Northern States and Imports from Peru



Source: USDA FAS (2025); USDA NASS (2025)

26

Grower Prices of Fresh Blueberries in Florida and Michigan



Source: USDA NASS (2025); USDA ERS (2025)

27

Fundamental changes in trade patterns

- US ag trade historically enjoyed **large trade surplus**
- But now facing tectonic shifts and **surging deficits**
- Blueberries provide a vivid example of what happened.

28

Specialty crops vs. Row Crops

- **Specialty crops** most affected by trade
- **Row crops** benefits both from trade and domestic ag support*



*(1995-2023 US total ag support over \$500 billion)

29

What it means for Florida growers

- Between a **rock** and a **hard place**

Growers need:

- Fair trade & fair treatment
- Immigration reform
- Technology
- Strategic business planning ...



30

Thank you!

Zhengfei Guan
guanz@ufl.edu
863-956-8670

A.Malek Hammami
ahammami@ufl.edu
786-217-9248

Yi Li
yi.li1@ufl.edu
352-871-2155