Global Berry Trends:
How Consumer and Trade Dynamics Are Shaping the Strawberry Market

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The Global Berry Consumption Landscape

- **$4.4 Billion** Global Import Market (2024)
- **+7%** Annual Growth (2020-2024)
- **Fresh fruits = 2/3** of total fruit consumption globally
- **66%** of fruit intake is fresh in South Korea
- **~50%** fresh consumption in US markets

Trade flows favor fresh strawberries over processed alternatives

Health Consciousness: The Primary Consumer Driver

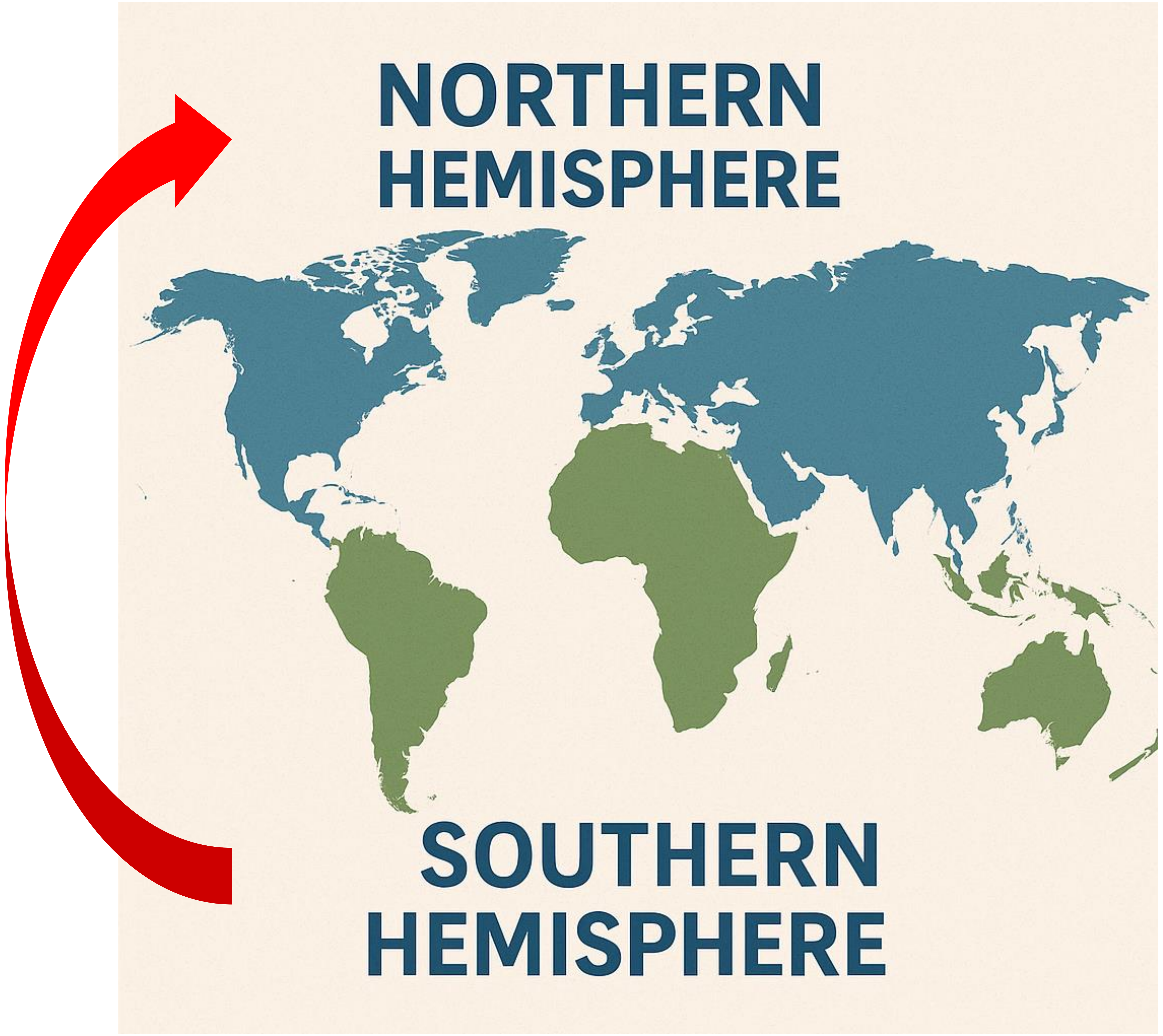
- **75%** of consumers believe fruits/vegetables crucial for healthy lifestyle
- **2-3 cups** daily recommended intake awareness
- **Premium validation in trade:**
    - Hong Kong: **$14,267/ton**
    - Singapore: **$11,070/ton**
    - World average: **$4,111/ton**

Health positioning drives 2-3x premium pricing globally

United States: Largest Global Market with Extreme Concentration

- **$1.20 Billion** annual imports (27% of world market)
- **Mexico dominance: 97.2%** of US imports ($1.16B)
- **Canada premium: +23%** unit value ($5,511/ton)
- **Asian ultra-premiums:**
  - –South Korea: $11,483/ton
  - –Japan: $12,409/ton

Consumer insight: 40% seek fresh-cut products, 74% health-focused



Germany:
Sustainability Premium Validation

- **$430 Million** annual imports (9.8% world share)
- **Spain: 56.8% share** but lower unit values ($3,316/ton)
- **Netherlands: 14.8% share** with **45% premium** ($5,197/ton)
- **Greece emerging: +28% growth** (fastest major supplier)

Consumer insight: 80% willing to pay premium for local sourcing

South America: Massive Opportunity Gap

Brazil consumer demand:

- 90% health consciousness (highest globally)
- 89% organic premium willingness
- November-March peak consumption

Export reality: Minimal global presence

- Peru: $852K exports, $4,136/ton premium
- Brazil: $163K exports only

Counter-seasonal opportunity largely untapped

Sustainability:
From Trend to Trade Reality

77% global consideration of sustainability attributes

European premium positioning confirmed:

–Netherlands export average: $6,409/ton

–Belgium export average: $6,110/ton

–World export average: $3,842/ton

Regional premium variations:

–Netherlands to Germany: 45% premium over Spain

Local sourcing commands measurable premiums

How Seasonal Consumer Patterns Drive Global Trade

Northern Hemisphere: June-August peaks, winter import dependency

US winter reality: 60% import consumption, Mexico 97% dominance

Counter-seasonal premiums proven:

– Egypt to Germany: $5,624/ton (57% premium)
– Asian suppliers to US: $11,000+ per ton

Supply chain insight: Proximity ≠ lower prices

Fresh preference creates year-round premium opportunities

Cross-Regional Demographics Driving Growth

Age patterns consistent globally:

- 18-24 years: 75% US, 72% Germany, 78% Brazil
- Premium willingness sustained across age groups

Gender advantage persistent:

- Female regular purchasers: 68% US, 70% Germany, 75% Brazil
- Male regular purchasers: 55% US, 50% Germany, 60% Brazil

Strategic implication: Young female demographic = core global target

Demographic consistency enables global marketing strategies

Global Trade Flows Reflect Consumer Priorities

Market concentration: Top 3 importers = 47% of world market

- US: $1.20B (27%), Canada: $462M (10.5%), Germany: $430M (9.8%)

Export leadership: Mexico + Spain = 42.5% of world exports

Premium validation across markets:

- Asian markets: 2-3x world average prices
- European sustainability: measurable premiums
- Counter-seasonal: 50%+ premiums achievable

Consumer preferences directly drive trade flow changes

Staying Ahead of Market Forces

Regional Strategic Imperatives:

- **US Market:** Value-added focus (40% seek fresh-cut) + seasonal dependency management
- **German Market:** Sustainability credentials essential (80% local premium willingness)
- **Brazilian Market:** Organic certification priority (89% premium willingness)

Universal Opportunities:

- Health positioning non-negotiable (74-90% across regions)
- Young female demographic targeting (15-20% advantage globally)
- Counter-seasonal premium positioning (50%+ premiums proven)