



Inspiring Possibilities in Blueberry Product Development

Today, consumers seek out blueberries across both geographical borders and grocery store aisles. Due to blueberries' longstanding association with well-being and their role in ushering in a new wave of food and beverage options for consumers around the world, the world's largest flavor and taste company crowned 'classic blueberry' as the flavor of the year in 2020. At USHBC, we wanted to know which categories and markets are driving blueberries' impressive global growth and where the greatest opportunities lie for food manufacturers.

Our 2020 research illuminated the answers. The following insights were developed from the Mintel Global New Products Database, Label Insights U.S. Product Sales, a USHBC-funded Global Health Claims Audit, input from blueberry ingredient users in food manufacturing and qualitative industry interviews with blueberry ingredient manufacturers and marketers.

Sales data between 2015 and 2020 reveal a short list of product categories that are top sales drivers both in the U.S. and abroad – indicating strong consumer interest and demand. The most sought-after blueberry product categories include:

- 1  **Fruit**
(packaged, snacks, spreads/jams)
- 2  **Vitamins/supplements**
- 3  **Bakery**
(mixes, doughs and batters, sweet goods, baking staples)
- 4  **Snacks**
(snack and variety packs, sweet snacks)
- 5  **Beverages**
(juices, juice drinks, smoothies, tonics)

These top growth categories were determined based on three opportunity tiers revealed by the research. The graph below (p. 3) illustrates where these product opportunities lie based on both volume of sales and sales growth from 2019 to 2020, as well as within specific categories where blueberries are currently highly utilized or underutilized relative to strawberries (blueberries' top berry competitor). High utilization demonstrates that blueberries have already established strong consumer appeal in the category, while low utilization suggests white space within a category where blueberries can be a compelling differentiator.

Three Opportunity Tiers for Blueberries in the U.S. Prepared Food Market

Primary Growth

Selling over 9M units a year with growth rates of over 3%. Primary growth categories represent products that sell high volumes and are growing at a modest pace.

Secondary Growth

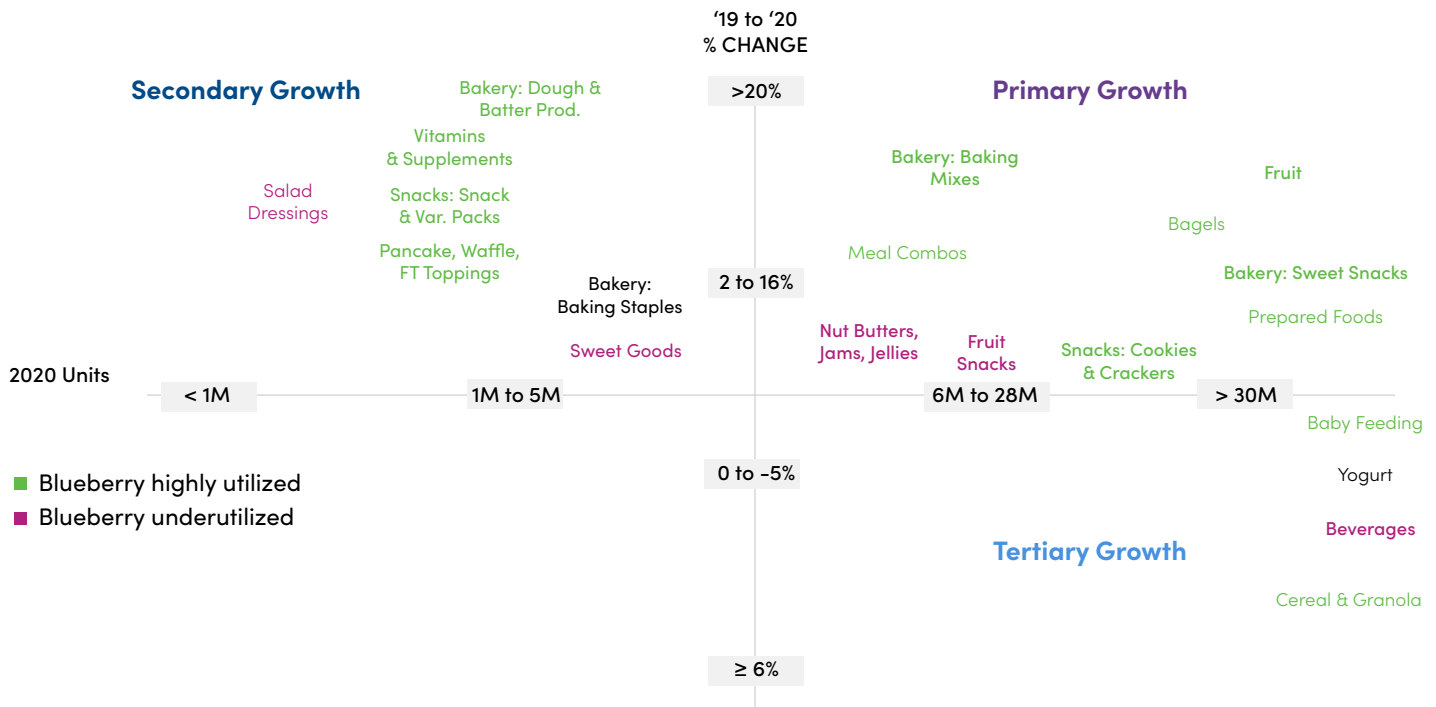
Selling between 550K to 5M units annually with growth rates over 6%. This tier represents smaller but rapidly growing product categories.

Tertiary Growth

Selling between 31M and 347M units annually and sales trends are stable. These are extremely large, well developed categories that aren't currently growing, but represent the most significant market share.



Three Opportunity Tiers for Blueberries in the U.S. Prepared Food Market: Breakdown by Product Category

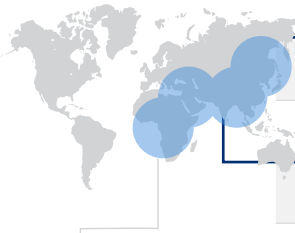


FINDING THE RIGHT FORMAT

Developing the perfect product starts with the right ingredients. The following make up the most-used blueberry formats in each opportunity tier. To learn more about blueberry ingredient forms, uses, benefits and sourcing for your product development, visit foodprofessionals.blueberry.org/for-food-manufacturers.

Primary Growth	Secondary Growth	Tertiary Growth
<ul style="list-style-type: none"> ✓ Blueberries ✓ Blueberry flakes ✓ Blueberry puree ✓ Dried blueberries ✓ Blueberry flavored bits ✓ Blueberry filling ✓ Blueberry fiber ✓ Blueberry juice infused dried cranberries ✓ Blueberry juice ✓ Blueberry juice concentrate 	<ul style="list-style-type: none"> ✓ Blueberries ✓ Organic blueberry puree ✓ Organic blueberry concentrate ✓ Organic dried blueberries ✓ Blueberry flavored cranberries, cranberry pieces ✓ Dried blueberries ✓ Blueberry juice concentrate 	<ul style="list-style-type: none"> ✓ Blueberries ✓ Blueberry puree ✓ Natural blueberry flavor ✓ Blueberry granola clusters ✓ Dried blueberries





Top Growth Regions

	2015	2016	2017	2018	2019	% Change 2015-2019	Total Sample
Number of New Blueberry Products Launched Per Year							
Middle East & Africa	54	66	83	85	123	127.8%	411
Asia Pacific	712	697	766	872	850	19.4%	3,897
Latin America	197	192	177	210	226	14.7%	1,022
Europe	1,219	1,215	1,284	1,342	1,353	11.0%	6,413
North America	531	652	553	550	540	1.7%	2,826
Total Sample	2,713	2,822	2,863	3,059	3,092	14.0%	14,549

Established Markets

Blueberries have become a coveted commodity outside the U.S. as well. Canada, Mexico, Japan, China and South Korea have also established significant consumer demand for blueberry products.

Emerging Markets

Due to their strong blueberry product growth over the last five years, the Middle East, Africa and Asia Pacific have emerged as key regions where blueberries are gaining notable popularity among consumers. Within these emerging markets, Saudi Arabia, UAE, Israel, Malaysia, Australia and Hong Kong are stand-out leaders in blueberry product innovation and development, indicating growing interest and demand amongst global consumers.

PERCEPTIONS OF BLUEBERRIES AROUND THE WORLD

In new product development, it's key for food manufacturers to understand the interests and needs of consumers – especially as they relate to the ingredients on the label – and be sensitive to how consumer trends may change around the world.

Blueberries help speak to a spectrum of health benefits that global consumers care about, and our research indicates blueberry ingredients play a role in supporting several popular health claims, whether directly through federally approved health claims or indirectly through the associations consumers have about blueberries. Immunity and antioxidants, two of blueberries' key strengths, are consistently identified as highly desirable consumer benefits across markets. Other top-ranking health benefits are shown below. Note that food claims related to anti-aging, cancer prevention and brain health are still being explored and remain unauthorized claims in the U.S.



Blueberry Core Benefit

In order of importance ↓

Cultural & Public Health Priorities

Consistent Top 5 Benefit Across Markets					
China	Japan	Korea	Philippines	UK	Vietnam
Immune Boosting	Immune Boosting	N/A	Immune Boosting	Antioxidant/ Immune Boosting	Immune Boosting
Other Desired Benefits by Consumer Market					
Anti-Aging/ Beauty from Within	Supports Digestion	Anti-Aging/ Beauty from Within	High in Micronutrients	Weight Loss	High in Micronutrients
Fiber	Stress Reduction & Relaxation	Weight Loss	Fortified with Nutrients	Low Sugar	Fortified with Nutrients
Cancer Prevention	Eye Health	High in Micronutrients	Supports Growth & Development	Fiber	Supports Growth & Development
High in Micronutrients	Improves Brain Function	High in Proteins, Low in Sugar/Salt	Energy Boosting		Anti-Aging/ Beauty from Within
Youthful Appearance	Work/Life Balance	Youthful Appearance	Over-and-Under Nutrition	Obesity	Child Malnutrition

Analysis of on-pack claims highlight a range of ingredient and health claims supported by presence of blueberry ingredients

Blueberry-Compatible Claims

Popular claims that are aligned with blueberry ingredients

- ✓ Plant based, plant powered
- ✓ Vegetarian, vegan
- ✓ Non GMO
- ✓ 0g trans fat
- ✓ Low calorie
- ✓ Other vitamins
- ✓ No artificial flavors, colors, sweeteners or additives
- ✓ USDA Organic
- ✓ No added sugar
- ✓ 100% whole grain
- ✓ Kosher
- ✓ Natural
- ✓ No preservatives
- ✓ Clean label
- ✓ Gluten free
- ✓ No high fructose corn syrup

Blueberry-Driven Claims

Claims that are directly supported by the health benefits and unique attributes of blueberry ingredients

- ✓ Immune system support
- ✓ Antioxidants (activity, infusion)
- ✓ Vitamin C
- ✓ Servings of fruit
- ✓ Natural sweetener
- ✓ Superfood, superfruit
- ✓ Real fruit/real fruit juice
- ✓ Fiber

Ensuring product packaging speaks the consumer's language is paramount as – let's be honest – the presentation is just as important as the product itself. Effective and successful on-pack messaging speaks to what consumers around the world are looking for.

In addition to boasting their health benefits, brands are also celebrating blueberries on labels.

In addition to boasting their health benefits, brands are also celebrating blueberries on labels to tap into other growing consumer trends, including the desire for plant-based foods, clean labels, real ingredients and performance claims. These claims are most prevalent in the fruit, beverage and vitamins/supplements categories, where blueberries can add real value. Research also suggests on-pack marketing that shows real blueberry visuals and calls out their associated health benefits may help drive sales.

To learn more about leveraging the benefits of blueberries in your products, visit foodprofessionals.blueberry.org/for-food-manufacturers/.

