

IMPACT REPORT 2019-2020



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"Crises are like adrenaline for innovation, causing barriers that once took years to overcome to evaporate in a matter of days."

– McKinsey & Company

If there's one thing everyone can agree on after the past 12 months, it's that change is hard. There's a new world order generally and in the blueberry industry, and I see this as an opportunity for positive change.

Fortunately, the USHBC is here to help us navigate times like these, and that's exactly what's happened due to the latest efforts of so many in the blueberry industry.

This report provides a glimpse into the many ways we've spotted and seized opportunities throughout 2019 and 2020. How we've made the most of the new marketplace. And how we plan to move forward and thrive.

Give it a read. I think you'll see that the possibilities are inspiring!

Sincerely,

A handwritten signature in black ink that reads "Chris Barnhill".

Chris Barnhill
USHBC Chairman



"Business as usual produces predictable results. But if you want something fresh, something new, that takes vision. Greatness only happens by design."

– Michael Hyatt, The Vision Driven Leader

It's a new day in the blueberry industry and in markets around the world. Thanks to the collaboration across our industry and a strong guiding vision, USHBC is perfectly poised to drive the next "Blue Wave" and move toward an era of continued growth and innovation.

With a strategic refresh for the organization in place and dynamic programming underway, we're heading into a bright future united around a host of new collaborations – focused first and foremost on driving domestic household penetration and demand for blueberries worldwide.

We hope you'll spend some time with this report that captures all we've recently accomplished. Then, please join us as we work to foster industry collaboration and move forward as the global leader in knowledge, programs and content to grow the value of blueberries.

Sincerely,

A handwritten signature in black ink that reads "Kasey Cronquist".

Kasey Cronquist
USHBC President

STRATEGIC REFRESH

Following an industry listening tour by USHBC President Kasey Cronquist, the USHBC Board of Directors approved the development and execution of a strategic refresh to reshape the organization's mission, vision and plan. Partner agency FoodMinds led a comprehensive update of the USHBC's strategic plan, with a new, forward-thinking vision directly informed by industry feedback.

The overarching theme of the strategic refresh, "USHBC Starts With Us," reflects USHBC's commitment to fostering greater collaboration among all stakeholders and moving forward as an industry. It also positions USHBC as the global leader in knowledge, programs and content used by the industry to grow the value of blueberries.

The strategic refresh envisions a wave of innovation on behalf of the council's growers, marketers, importers and industry stakeholders to drive consumer demand for blueberries through:

- Collaboration to benefit all value-chain partners.
- Data and measurement to inform strategy and ensure impact.
- Development of educational resources to share knowledge.
- Innovation to drive our next phase of growth and create new opportunities.
- Health research to provide a pipeline of content that drives value.

USHBC Starts With Us



"It also positions USHBC as the global leader in knowledge, programs and content used by the industry to grow the value of blueberries."

- USHBC President Kasey Cronquist

BRANDING: A NEW LOOK

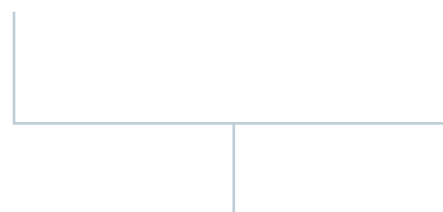
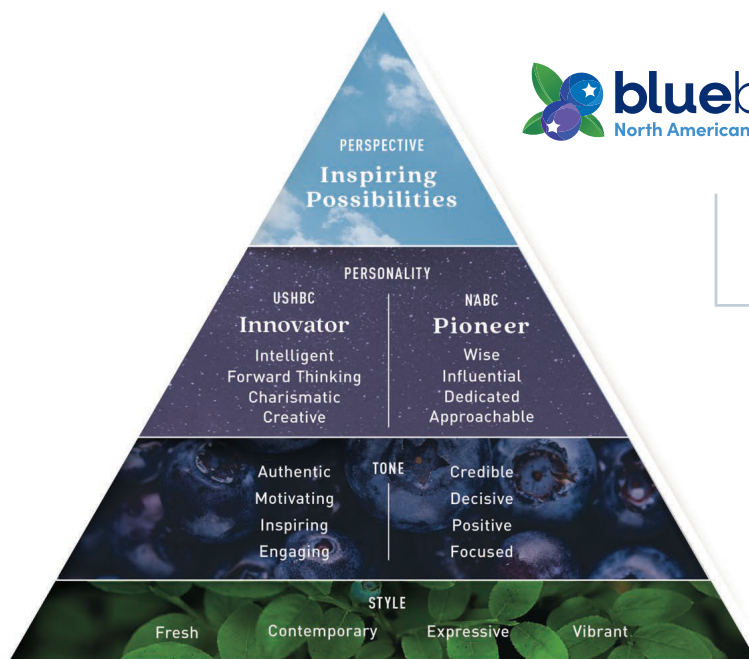
At the start of 2020 during a strategic planning meeting, USHBC Promotion Committee Chair Bob Carini recognized the need for USHBC to address the cornerstone of all future work and communications by updating the organization's brand. Led by agency partner Sterling Rice Group (SRG), robust foundational work was conducted, including more than a dozen stakeholder interviews, a comprehensive audit of other board and brand identities, and the use of archetypes and branding tools to identify what the two councils shared and how they were unique.

The team ultimately aligned on what's become affectionately referred to as "the kaleidoscope berry" treatment, with the brand line of "Inspiring Possibilities."

With a full brand identity guidebook, including fonts, colors, patterns, photography and tone-of-voice

guidance for copywriting, the new brand plays a critical role in clarifying and differentiating the roles of both councils moving forward. **Blueberries: Inspiring Possibilities** unifies all touchpoints and messaging across all USHBC and NABC programs, and ensures that we lead with a consistent and forward-focused brand.

To ensure we bring a balanced perspective to our constituents, we fuse visionary thinking with pragmatic solutions. We seek to inspire our growers, industry partners and consumers while striving to expand our knowledge base. And we embrace change with curiosity, constantly evolving with a new global economy, exploring new opportunities for blueberries and positioning the industry successfully for the future.





2020 SPRING MEETINGS

In early March, blueberry industry members from across the country descended on Washington, D.C., for the 2020 NABC and USHBC Spring Meetings. The event was kicked off with USHBC President Kasey Cronquist's first keynote to industry members in which he presented the strategic refresh ([see p. 4](#)), and how it will grow the blueberry category and lead to greater innovation in the industry.

U.S. Highbush Blueberry Council **Impact Report 2019-2020**



Industry members participated in sessions to learn from various experts in the field, including presentations from USHBC agency partners Padilla, FleishmanHillard and SRG. Other keynote presenters included USDA's Nancy Hubbell, director of the Horticultural Crops Branch, Cooperator Programs Division, Global Programs, FAS; and Adam Hollowell, trade policy specialist for Bryant Christie Inc.

2020 VIRTUAL CONFERENCE & EXPO

In fall 2020, in light of the pandemic, the USHBC and NABC took their meetings virtual and added educational content to reach a wider audience. The 2020 NABC/ USHBC Virtual Conference & Expo brought together blueberry industry stakeholders in innovation, marketing, genetics, health research, tech and more. More than 1,100 people registered for the industry-wide event, which also included a celebration of the USHBC's 20th anniversary and recognition for 11 industry leaders across every link in the blueberry supply chain.

The content from the virtual event is available for viewing at BlueberryEvents.org. Sign up for free to gain access to 25+ informative and inspiring sessions.

Keynote Speakers



David Brazelton
USHBC Health Research Chair



Ellie Norris
USHBC Export Committee



Alicia Adler
Vice President of USHBC/NABC



VISION
Michael Hyatt
CEO
Michael Hyatt & Co.



MARKETING
Todd Eagan
Berry Buyer
Costco



INNOVATION & TECH
Vonnie Estes
VP of Technology
Produce Marketing Association

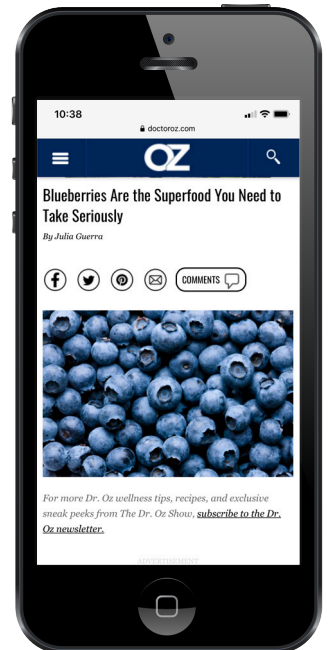


HEALTH RESEARCH
Eric Rimm
Professor of Epidemiology
and Nutrition
Harvard T.H. Chan School
of Public Health

DRIVING DEMAND

The consumer promotions and marketing program, managed in partnership with Padilla, is at the forefront of building consumer demand and driving volume and value for the blueberry industry. These efforts employ a unifying campaign platform with a consistent call to action to enjoy blueberries for their taste, health benefits and ease of use.

In 2019, the Positively Bluetiful campaign outperformed benchmarks and generated 28 million bonus impressions. USHBC enlisted Tia Mowry-Hardrict, a busy, health-minded mother of two and an up-and-coming star in the food space, to authentically exemplify everyday use of blueberries.



Digital advertising reached millions with Bunch of Bluetiful ads across the path to purchase, placing blueberries top of mind and top of list at the point of sale. Ads appeared on smart TV channels, popular websites, across social media and paid search, through strategic partnerships, across shopping list apps and on mobile phones in the produce aisle.



USHBC was well-positioned to leverage two exciting announcements: Pantone named "Classic Blue" the Color of the Year, and Swiss flavor company Firmenich named blueberries the Flavor of the Year.



THE BLUEBERRY METHOD

With the immediate and ongoing need to drive demand, The Blueberry Method campaign in 2020 helped put more blueberries on shopping lists and in carts during the reality of the pandemic and consumers' shifting buying habits. With the booming growth in the fresh snacking category, consumers are looking for easy snacking options that are convenient and healthy – and blueberries are the answer. Packed with tasty blueberry snacking solutions, shoppable recipes, relatable parenting woes and, of course, humorous videos featuring “Blueberry Methodologist” Dr. Barry Azul and his beloved problem-solving blueberries – The Blueberry Method was squarely aimed at driving volume. Content was promoted through video ads across USHBC channels and target audiences' favorite shopping sites.



Award-Winning

The Blueberry Method ad won a Silver W³ award in the “Brand Entertainment – Short-Form Video” category. Judged by the Academy of Interactive and Visual Arts, the prestigious, highly competitive W³ Awards spotlight creative excellence on the web, and recognize marketing professionals behind award-winning websites, video, marketing, mobile, social and podcasts.



RAPID RESPONSE PLAN

Earlier in 2020, in light of the global pandemic, the council developed a rapid response program to incite a tidal wave of blueberry demand, and then harnessed that passion and commitment for retailers.

Geofence
Retailers

Incentive-Based
Shopping Apps

Shoppable
Recipe Ads

Nano Influencer
Campaign



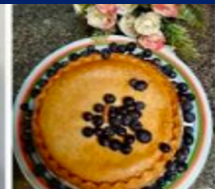
Blueberry Muffins

Serves 12

Directions

- ✓ 1 cup fresh or frozen blueberries
- ✓ 1-½ cups plus 1 tablespoon flour
- ✓ ½ cup sugar
- ✓ 1 teaspoon baking powder
- ✓ ½ teaspoon baking soda
- ✓ 1 teaspoon nutmeg
- ✓ ½ teaspoon salt

Shop Ingredients



Reached
more than 1 million
Costco shoppers.

Drove
28,890
verified blueberry
purchases with
4:1 return on
investment.

Reached
8 million,
driving them to
add blueberries
to their carts.

Reached more
than **3 million**
consumers.
Drove a 20% lift
in purchase intent.

NEW POSITIONING

USHBC's new strategic positioning and consumer call-to-action, **Grab a Boost of Blue**, was revealed during the NABC/USHBC Virtual Conference & Expo and has since received overwhelmingly positive feedback from people across the industry. Consistent with the organizational branding while providing a motivating message for consumers, **Grab a Boost of Blue** will be used in advertising, at point of sale, in social media channels and on packaging to remind the consumer of the healthy boost of deliciousness they get from a handful of blueberries. Six "power period" programs and accompanying toolkits will be provided throughout the year. These resources are designed to help industry stakeholders capitalize on USHBC's nationwide promotion efforts to motivate consumers to make blueberries part of their everyday lifestyle.

After exposure to the **Grab a Boost of Blue** concept in consumer research and testing, participants significantly increased their purchase intent for both fresh and frozen blueberries. The top 2 box purchase intent for fresh blueberries increased by 30 points – 87% of consumers indicated they would definitely or probably purchase fresh blueberries on their next grocery trip.

Source: FoodMinds Strategic Insights, USHBC Boost of Blue Communication Check, September 2020, survey of 300 U.S. food shoppers, past 30 day fruit category purchasers.



Every carton of blueberries packs big boosts of that feeling you get when you are doing something right. Right for your kids, yourself and your tastebuds. Colorful, healthy and delicious, blueberries come with all the little healthy bits that make you feel better inside and out. And best of all, they start in your breakfast pancakes and keep doing their thing all day long in salads, snacks, entrees, cocktails, or straight from the package all on their own.

So next time you need that little something special to get you through, **Grab a Boost of Blue**.



The perfectly inspired, tasty home school treat. No-Bake Frozen Blueberry Bars for a biga boost of blue and even bigger smiles.

#GrabaBoostofBlue
#BoostofBlue
#Blueberries
#HomeSchool



Frozen, blue and good for you, too.



Consumer Promotions & Marketing, Health Professionals

INFLUENCERS & SOCIAL MEDIA

Influencer partnerships generate new blueberry recipes and usage inspiration, extend reach, and create awareness of the council and owned channels. Partners in 2019 and 2020 helped bring the respective campaigns to life through real usage ideas for blueberries fitting into everyday, busy lives.

USHBC continues to grow its platforms through dynamic and customized content. A greater emphasis on community management also increased engagement and excitement among fans.



Tiffanyish



Foodness Gracious



BLUE CREW

The USHBC Blue Crew is a group of five dietitian ambassadors who create an ongoing cadence of blog posts, videos and recipes to promote health messaging and inspire target consumers to buy and eat more blueberries. Find their delicious content on USHBC's website and social channels.



Mary Ellen Phipps,
MPH, RDN, LD



Deanna Wolfe,
MS, RDN



Kelly Jones,
MS, RD, CSSD



Maggie Michalczyk,
RDN



Mia Syn,
MS, RDN

PARTNERSHIPS

Today's Dietitian and Produce for Better Health Foundation

A partnership with *Today's Dietitian* Spring Symposium 2020 reached 3,800+ health professionals with USHBC-funded science. Blue Crew member Mary Ellen Phipps, MPH, RDN, LD, along with USHBC Research Administrator Leslie Wada, Ph.D., RD, hosted a live webinar discussing how blueberries support health, along with snacking tips and ideas.

RECORDED WEBINAR PRESENTATION

EARN 1 CEU FREE

Power Snacking

*Increase Overall Nutrition
with Blueberries*

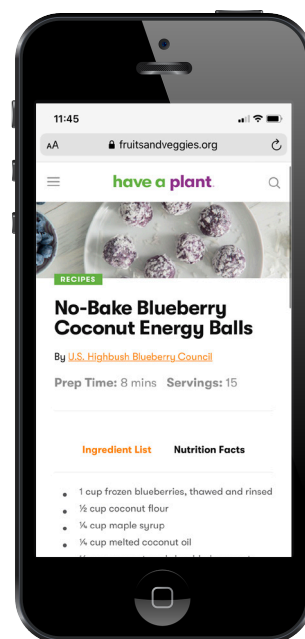
PRESENTED BY

Mary Ellen Phipps, MPH, RDN, LD,
and Leslie Wada, PhD, RD

This activity is accredited through
U.S. Highbush Blueberry Council.



USHBC also partnered with Produce for Better Health Foundation (PBH) for social promotions to feature the No-Bake Blueberry Coconut Energy Balls recipe, which was among the top 10 highest performing paid member promotions that quarter.



2019-2020 CUMULATIVE RESULTS

USHBC's promotions program targeting consumers and health professionals consistently meets or exceeds the Promotion Committee's goals and benchmarks each year.

11.8M

Campaign
Video Views



131M

Digital Advertising
Impressions



7.4M

Digital Advertising
Clicks/Engagements



95M

Social Media
Impressions



462 Earned Media Placements

WELL  GOOD

Men'sHealth

Eat This, Not That!

PureWow

healthline

SHAPE

LIVESTRONG™.COM

GMA

EatingWell.com
WHERE GOOD TASTE MEETS GOOD HEALTH

POPSUGAR.

HEALTH RESEARCH

By educating and motivating health professionals to recommend blueberries, USHBC's health professional communication programs build credibility for and maintain high awareness of blueberries' health benefits.

The highlight in 2019 was the publication of the CIRCLE study (May 2019), which found that participants with metabolic syndrome who consumed the equivalent of one cup of fresh blueberries daily (given as 26g of freeze-dried blueberries), showed clinically relevant changes in measures of heart health. Promotional efforts included a New York media event during American Heart Month and proactive outreach, that generated a steady drumbeat of articles reaching consumers and health professionals with the blueberry message.

From 2019 to 2020 to date: 278 media placements referenced USHBC-funded, emerging blueberry health research.

In 2020, five new human clinical studies were funded to expand knowledge on the effect of blueberry intake across the lifespan:

1. "Blueberry supplementation and inflammation resolution after exercise" – David Nieman, Ph.D., Appalachian State University
2. "Does blueberry supplementation mitigate the inflammatory, oxidative stress, physiological and performance effects of long distance trail running?" – Jason Brandenburg, Ph.D., University of the Fraser Valley
3. "Effects of blueberry as a first food for infants on gut microbiota, inflammation and immunity: a double blind, randomized controlled trial" – Minghua Tang, Ph.D., University of Colorado
4. "Physiological consequences of blueberry intake in older women" – Kenneth Mukamal, Ph.D., Beth Israel Deaconess Medical Center/Harvard University
5. "Changes in intake of fruits and dietary flavonoids and health outcomes: Population-based studies" – Aedin Cassidy, Ph.D., Queens College Belfast; and Eric Rimm Ph.D., Harvard University

Health Research Snapshot Since 2000:

- 52 Scientific publications
- 16 Ongoing studies
- \$9.6 Million dollars invested
- 40 Collaborations with academic institutions in the U.S. and internationally

BUY EM, EAT EM, LOVE EM.

The Blueberry Method
An easy way and nutritious solution to eating well – just grab a handful, rinse and enjoy!

Boost your daily recommended servings of fruit.
Blueberries contribute phytonutrients called polyphenols. This group includes anthocyanins (163.3 mg/100 g), plant compounds that give blueberries their beautiful blue color.



Get 4 essential nutrients.


- Fiber**
Heart health, feeling full, staying regular, keeping cholesterol in check
- Vitamin C**
A healthy immune system
- Vitamin K**
Bone metabolism, regulating blood clotting
- Manganese**
Converting proteins, carbs and fats into energy, bone development

1 Serving 80 Calories

Know we're always learning more.
Blueberries may promote good health in additional ways. Areas of research:

 Cardiovascular Health
  Brain Health
  Exercise
  Insulin Response
  Gut Health

Fresh or frozen blueberries are infinitely snackable.
Whether you're just grabbing a handful on the go or sprinkling them into your favorite recipes for a healthful boost, you'll love how versatile your blueberry stash can be!

 Blueberry Turmeric Smoothie
  Blueberry Lemon Biscuits
  Blueberry Coconut Roll-Ups
  Blueberry Pistachio Parfait

Heart Check certification does not apply to research, scientific information, or recipes unless explicitly stated.

Find blueberry scientific research, health information, recipes, tips and more at **BlueberryCouncil.org**

blueberries
US Highbush Blueberry Council

2019 DRIVING VOLUME THROUGH FOODSERVICE

There was a tremendous increase in blueberry volume at foodservice from 2005 to 2019, with a 93% growth in menu placements (Source: Datassentials; Fruits, Berry Varieties and Blueberries; August 2019).



In partnership with *Plate*, USHBC hosted a private event with Dallas operators in 2019 to build new relationships and taste innovative blueberry dishes highlighting versatility across the menu. This resulted in seven new foodservice blueberry recipes added to the website.



At the 2019 CIA Worlds of Flavor event, USHBC sponsored a kitchen demo to explore the flavor affinities of blueberries and inspire unexpected global pairings, led by Chef Jamie Simpson of The Culinary Vegetable Institute at The Chef's Garden and Chef Shirel Berger of Opa in Tel Aviv.



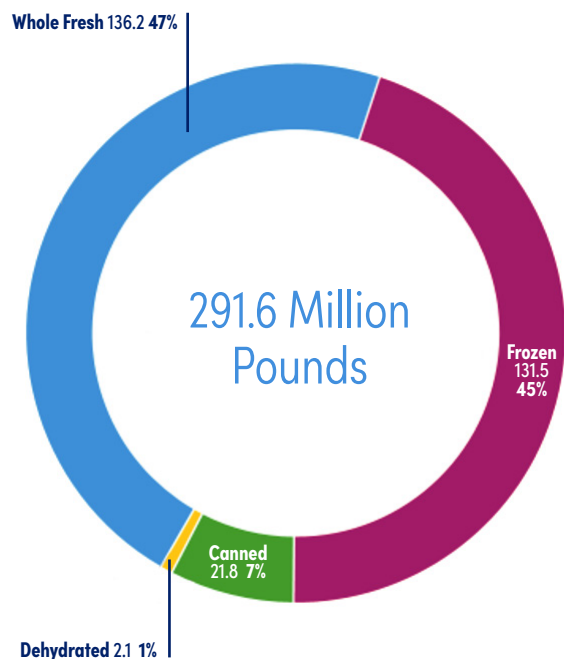
USHBC partnered with National Farm to School Network (NFSN) during National Farm to School Month in October 2019, throughout entitlement season and back to school. Promotional efforts included an educational webinar reaching 300+ school foodservice professionals, social posts reaching an audience of 13K, e-blasts and more. The Highbush Blueberry Farm to School Playbook was promoted via a digital ad campaign and promotions with School Nutrition Association (SNA), driving traffic to [BlueberriesInSchools.com](https://www.BlueberriesInSchools.com).

2020 U.S. VOLUMETRIC STUDY & TARGET PRIORITIZATION

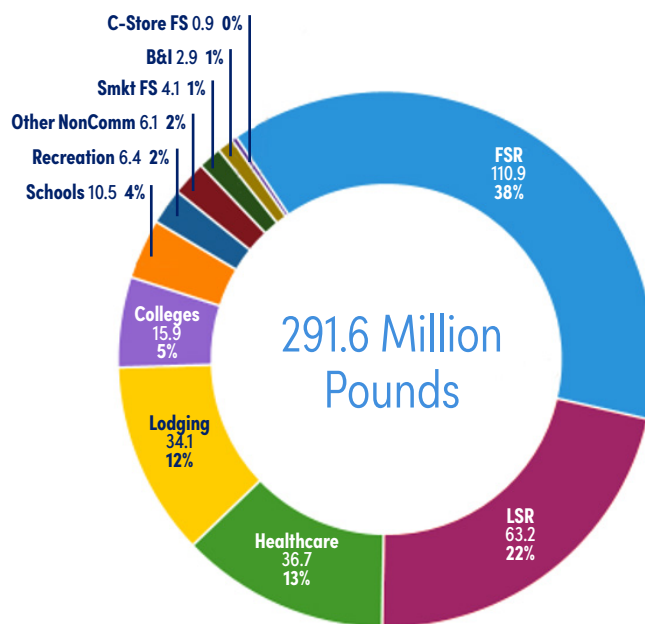
In 2020, USHBC put a laser focus on its foodservice program to strategically drive more demand in this space. USHBC worked with agency partner SRG and research firm Technomic to field a study to measure the total blueberry volume sold through foodservice. The objective was to identify a baseline volume for all blueberry formats across industry sectors. The study revealed opportunities to promote canned and dried blueberries within foodservice, and increased focus on K-12, colleges and universities, and limited-service (fast food) restaurants.

A comprehensive target prioritization strategy further focused program efforts on commercial chains and noncommercial operators with the highest propensity to put blueberries on the menu and have the potential to move the most volume.

U.S. Foodservice Blueberry Volume



Blueberry Operator Segments: All Formats



2020 INNOVATION & NEW SALES COLLATERAL

Chefs are “hungry” to see more versatile blueberry applications that could work across their menus. Several chefs from the SRG Culinary Council used all formats of blueberries to create more than 100 new culinary concepts. These ranged from breakfast-beyond-the-pancake or -muffin to savory, globally inspired flavors and items that work across dayparts and operational styles – all with blueberries as the hero ingredient. These concepts are featured in an innovation sales piece in both printed and digital formats, as well as in ongoing outreach directly to key operators.

A range of BBQ sauces, a savory compote, Mediterranean meatballs, sweet and savory hummuses, layered salads perfect for grab-and-go, flatbreads, wraps and other on-trend handhelds were offered to provide fresh blueberry innovation to foodservice professionals.



MENU DIRECTIONS

In partnership with *Foodservice Director* magazine, USHBC held a keynote speaking and demo session at the Menu Directions conference in Nashville, the key annual event for noncommercial operators, including colleges and universities, K-12, health care, senior living and more. The sessions were exceptionally well-attended and generated tremendous interest both in the applications shared and in ongoing support and ideas from USHBC.



PANDEMIC IMPACT: SUPPORTING FOODSERVICE



In mid-March 2020 when restaurants began closing due to social distancing guidelines, USHBC stepped up to assist restaurateurs nationwide by working with well-known industry chefs to develop a series of innovative new blueberry concepts.

Participating chefs donated their stipends to CORE, a nonprofit dedicated to supporting the children of restaurant employees, and USHBC and the blueberry innovations were featured prominently in the resulting press.

In light of in-person gatherings being canceled, USHBC created a first-of-its-kind virtual culinary demonstration series to efficiently connect with a broader group of national and regional chains. The series of three video sessions was supported by custom editorial and advertorial content in *Flavor & The Menu*, as well as multiple digital touchpoints, all aimed at educating and inspiring chefs with new uses for all formats of blueberries. The team also negotiated a free value-add by securing a blueberry-centric cover and editorial piece for the Sept./Oct. issue of the magazine, reaching more than 35K foodservice professionals.

USHBC recently promoted its thought leadership by unveiling a trends-oriented video: *Blueberries Deliver for the Restaurant of the Future*. Virtual event sponsorships, hosted webinars and one-on-one virtual meetups also engaged this important audience.

INDUSTRY RELATIONS

As part of the strategic refresh, USHBC's new vision for the Industry Relations (IR) program was to promote thought leadership and engage blueberry growers and industry stakeholders more meaningfully than ever before.

New IR program goals:

- USHBC is recognized as the global leader for development, access and analysis of production, harvest, distribution and sales of blueberries.
- Steadily increase engagement year-over-year among industry stakeholders, U.S. highbush blueberry growers, packers/shippers, importers and retailers.

Early in 2020, the IR program evolved into robust, systematic engagement with stakeholders through content demonstrating the value of USHBC programs and how they directly contribute to industry growth in both volume and value.

In light of a U.S. Senate resolution declaring July as National Blueberry Month, the council created a Blueberry Month toolkit to help growers, marketers, retailers, and other organizations promote blueberries all month long.



Subscribe to

The Business of Blueberries

U.S. Highbush Blueberry Council



"The Business of Blueberries" podcast was created to foster greater dialogue between industry voices around the markets, research and technology related to blueberry production. Since launching in June 2020, the podcast has garnered more than 7,500 downloads in 6 months, with consistently high episode engagement. The most popular episodes to date have been topics on optical sorting and machine harvesting, as well as hearing from leaders in the industry who help reflect and cast vision on the successes and the inspiring possibilities yet ahead for blueberries.

**USHBC
Best
Practices
for U-Pick
Blueberries
in 2020**

blueberries
U.S. HIGHBUSH BLUEBERRY COUNCIL

USHBC hosted a series of well-attended educational webinars around timely topics, including best practices for U-Pick, a look ahead at the foodservice industry, The Blueberry Method launch and rapid response results.

INDUSTRY RELATIONS (cont.)

U.S. Highbush Blueberries:
Billions of Reasons to
**BUY EM,
EAT EM,
LOVE EM.**



Highlights of the economic impact
from U.S. highbush blueberry growers

About the Study

The economic impact study was commissioned by the U.S. Highbush Blueberry Council and conducted in April 2020 by Dennis Tootelian, Ph.D., Emeritus Professor at California State University, Sacramento. The analysis is based on U.S. highbush blueberry acres in production and in development. Projections are based on annual average expenditures, which means that this impact is expected to occur each year that such spending occurs. Acreage statistics were secured from the U.S. Department of Agriculture. The full economic impact study and analysis is available at www.ushbc.org.



U.S. IMPACT

Annual economic impact
generated by growers :

**~\$4.7
BILLION**
(\$12.7 million/day)



U.S. JOBS

Full-time equivalent jobs
created and sustained by
growers each year:

44,535



U.S. FOOTPRINT

National highbush
blueberry acreage*:

109,584

*Bearing and nonbearing acres

U.S. INDIRECT BUSINESS TAXES

Indirect business taxes
generated by growers:
(not including income taxes)

**~\$145
MILLION**
(\$400,000/day)

That's more than the
2019 budget for ...



U.S. Department
of Homeland
Security's
Operations and
Support budget
(\$129 MILLION)

U.S. LABOR INCOME

Labor income generated
by the business activities
of growers:

**~\$1.8
BILLION**
(\$4.9 million/day)



These dollars go into wages and salaries for new employment, as well as expanded incomes to those already in the labor force for activities such as overtime pay. These dollars are then diffused throughout the economy as the funds are spent on crucial goods and services such as food, housing, transportation and health care.

"The U.S. highbush blueberry industry – including 12,739 blueberry farms – is a powerful financial force. Behind every farm are growers who not only tend a truly remarkable superfruit, but also stimulate business activity, create thousands of jobs and contribute mightily to the economy."

— Kasey Cronquist | President
U.S. Highbush Blueberry Council



With agency partner Fleishman Hillard, USHBC commissioned an Economic Impact Study, including national and state-level data, which found that the blueberry industry is responsible for creating and sustaining more than 44,535 full-time equivalent jobs each year and generating \$4.7 billion in total economic impact.

The research was conducted in April 2020 by Dennis Tootelian, Ph.D., emeritus professor of marketing and former director of the Center for Small Business in the College of Business Administration at California State University, Sacramento. The analysis is based on both U.S. highbush blueberry acres in production and in development. Projections are based on annual average expenditures, which means that this impact is expected to occur each year that such spending occurs. National acreage statistics were secured from the United States Department of Agriculture.

INDUSTRY RELATIONS (cont.)



The USHBC recognized 11 leaders who have made incredible contributions to the blueberry industry over the past two decades. These individuals were honored at the 2020 NABC/USHBC Virtual Conference & Expo:

Grower Innovation, Production:

Rod Cook, Ag-View Consulting

Grower Innovation, Sustainability:

Tom Avinelis, Agriculture Capital

Grower Innovation, Good Practices:

Mike Makara, former chair, British Columbia Blueberry Council

Grower Innovation, Community Involvement and Outreach:

Lorrie Merker, MBG Marketing

Marketing and Promotions:

Kirk McCreary, former MBG Marketing CEO

Food Manufacturing and Advances in Blueberry Products:

Joe Meduri, Meduri World Delights

Frozen Blueberry Products:

John Shelford, Naturipe Farms

Export and Global Community Relations:

Bryan Sakuma, Sakuma Brothers Holding Company

Merchandising/Retail:

Darrell Piliego, Publix Super Markets

Foodservice:

Andrew Hunter, Chef Andrew Culinary Development

Genetic Research and Breeding with Nursery Propagation:

David Brazelton, Fall Creek Nursery

U.S. Highbush Blueberry Council Impact Report 2019-2020



USHBC secured consistent earned trade media coverage across initiatives at a steady increase compared to previous years, as well as a paid full-page spread included in *The Produce News*' berry issue promoting The Blueberry Method.

Fresh Fruit Portal.com

MICHIGAN
AG TODAY

Fresh
Plaza

The Packer

supermarket
PERIMETER



EXPORT

The USHBC export program strengthens and grows the industry by opening new international markets for U.S. highbush blueberries and increasing consumer demand overseas. Extensive work is done to complete pest risk assessments, gather consumer insights and promote blueberries to consumers around the world.

Over the past year-and-a-half, the council's export efforts have achieved the following on behalf of the industry:

- Secured \$1.8 million to address technical barriers to trade through the Technical Assistance for Specialty Crops program and \$600,000 from the Agricultural Trade Promotion program.
- Opened Vietnam, China and the Philippines for U.S. fresh blueberries, creating significant opportunity for the industry and supporting the USHBC's refreshed strategic goal of doubling exports by 2025.
- Established and expanded foodservice programs in Asia, and hosted the first virtual international trade event series with the Philippines and Vietnam.
- Conducted a global assessment of opportunities and challenges for U.S. highbush blueberries in 28 countries and regions, leading to the development of an online database for growers with user-friendly trade data, regulatory information and opportunity analysis.
- Developed a new logo highlighting U.S. origin to launch in export markets in 2021.



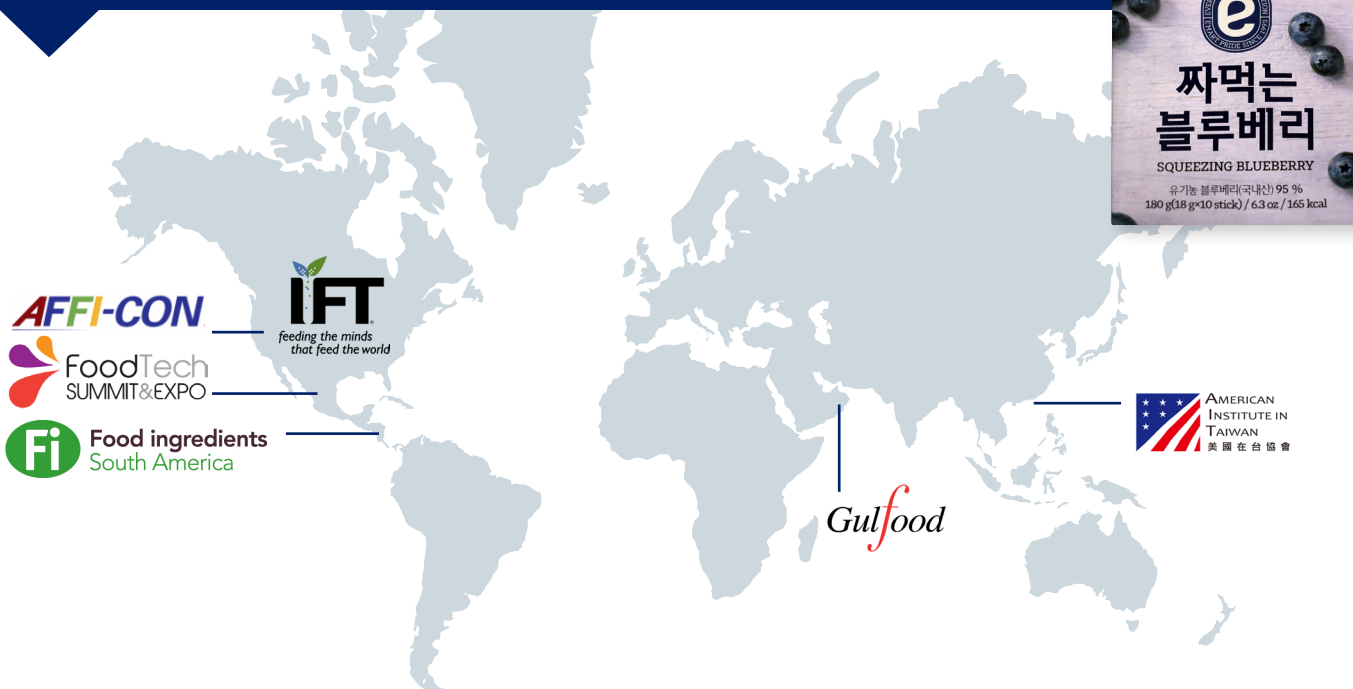
GLOBAL FOOD MANUFACTURING

USHBC continues to drive highbush blueberry interest and use in the food manufacturing channel in key markets around the world. The program is designed to communicate the benefits of blueberries and encourage greater product development at home and abroad. In the past several years, the industry has seen a significant increase in blueberry-containing products worldwide, with innovation in ready-to-use blueberry ingredients such as dried, liquid and powders driving new uses.

In 2019 and leading into 2020, prior to the global pandemic, USHBC executed trade event participation and in-country activations in seven regions across the globe to network and engage with leading food manufacturers.



Institute of Food Technologists (IFT) SHIFT 2020 virtual expo, Mexico Food Tech Summit, Food Ingredients South America, American Institute in Taiwan (AIT), Accelerating Growth with Frozen Ingredients, GulFood and more, including additional in-country activations.



2019-2020 HIGHLIGHTS



Taiwan international representative Mandy Chen worked with product developers at I-Mei Foods, a consumer product developer and convenience store industry giant, to produce a blueberry powder topping for ice cream made from frozen blueberries. It takes 11 kg of frozen blueberry to make 1 kg of powder.



Southeast Asia international representative Hanh Huynh helped establish the market for dried blueberries in snacks and baking in the region. In 2019, she organized promotions in 32 cities, 68 stores and 272 sampling days to kick-start the fresh blueberry market. Her program has executed regional activations in Vietnam, Laos, Cambodia and Myanmar.



While dried blueberries were nonexistent in the Middle East three years ago, today we see a steady sale of dried-infused blueberries shipped to the Persian Gulf states including Kuwait, Saudi Arabia, Qatar and Oman. Most are sold in bulk or in Arabic sweets.

**Build a
partnership
with
blueberries
that drives
demand.**

LEARN MORE

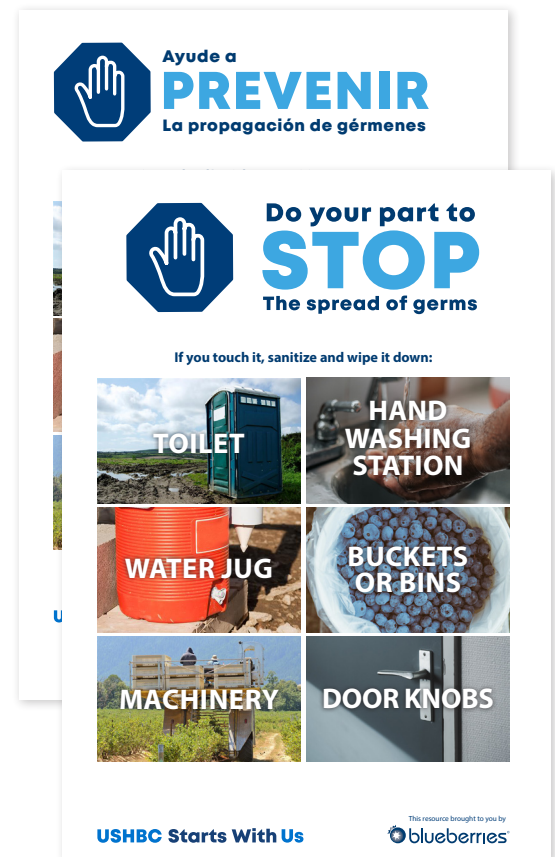


To keep blueberries top of mind for food manufacturers, USHBC launched a digital advertising campaign laser-focused on brand targets in priority global markets, reaching executives at companies like Unilever, Danone and Nestlé. In the first 10 weeks, the campaign yielded nearly 2,700 ad clicks, driving key decision-makers to blueberrytech.org.

GOOD MANAGEMENT PRACTICES

Throughout 2020, USHBC continued its commitment to promoting sustainability and transparency in its growing practices. Early in the year, the primary focus of the GMP Committee was a response to the global pandemic. The health and safety of the blueberry workforce is paramount, along with continuing to deliver a safe product for consumers. Industry members adhere to rigorous standards to ensure a safe workplace in order to deliver blueberries across the globe.

The council developed timely resources and information for operators to work safely. A series of flyers were created, in both English and Spanish, based on guidance from the Centers of Disease Control and Prevention (CDC), Food and Drug Administration (FDA), Environmental Protection Agency (EPA) and other leading authorities. More than 1,100 printed copies were shipped to blueberry operations across the country, along with a “Blueberries Are Essential” poster, offering a message of support and inspiration in light of the blueberry supply-chain workforce being deemed essential in the global pandemic.



BLUEBERRY TECH & INNOVATION

The 2020 Blueberry Technology Symposium was delayed due to the global pandemic. To share some of the valuable information that would have been included in the symposium, “The Business of Blueberries” podcast (see p. 20) featured several guests to discuss new technology and solutions that address industry-wide problems growers experience every day on farms.

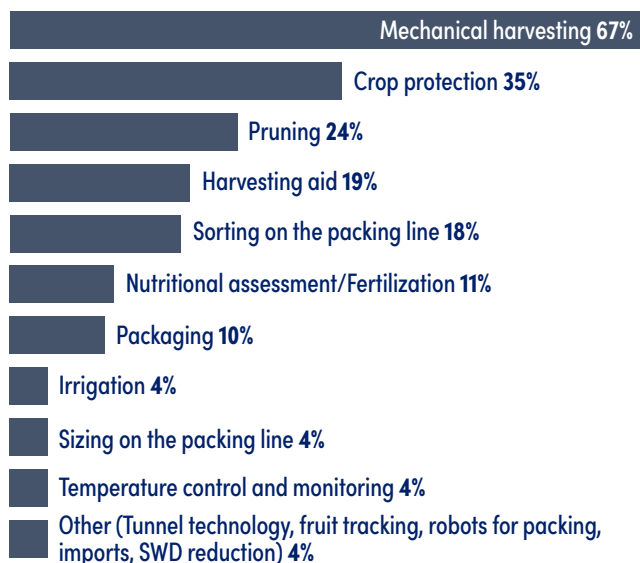
TECHNOLOGY & INNOVATION RESEARCH REPORT

USHBC commissioned Qanopy Group to conduct a survey to assess the state of technology adoption in the blueberry industry. The report was representative of different viewpoints by role in the supply chain, varying levels of industry experience, geographic dispersion and crop size. Below are a few key findings:

- At an industry level, the top three drivers of change are changing consumer preferences, labor supply and global competition.
- Drip irrigation/fertigation and optical sorting have relatively high levels of usage and perceived value.
- Insect trapping and mechanical harvesting are two areas most in need of innovation, as they have typically been a struggle to scale and identify cost efficiencies around.
- More education is needed around harvesting aids, satellite recognition and blockchain given its low familiarity and usage among respondents.

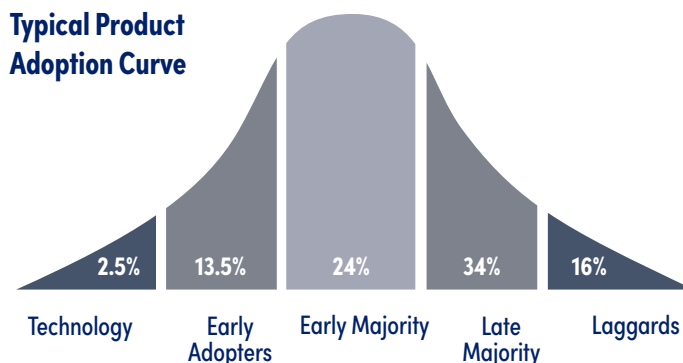
Source (includes charts on right): U.S. Highbush Blueberry Council: 2020 Technology & Innovation Research, May 2020

SUPPLY CHAIN AREAS TECHNOLOGY MOST NEEDED

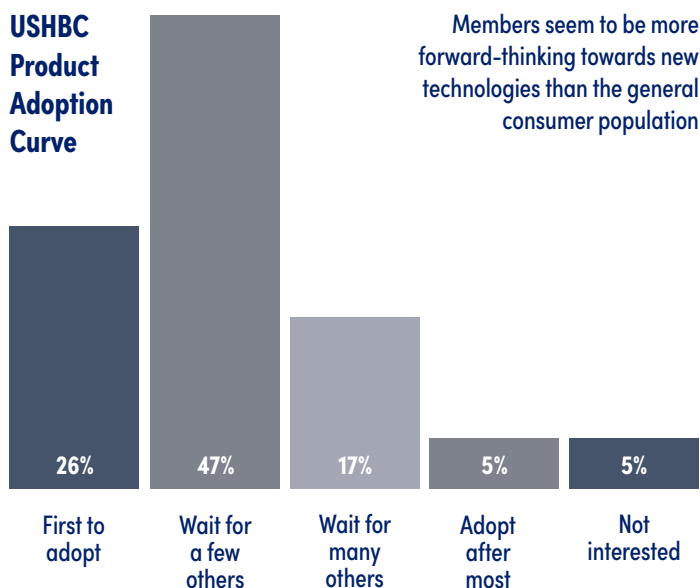


WILLINGNESS TO ADOPT NEW TECHNOLOGIES

Typical Product Adoption Curve



USHBC Product Adoption Curve



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