



North American Raspberry & Blackberry Association

2018 Raspberry & Blackberry Pricing Survey

SHORT VERSION REPORT



More than 140 growers participated in NARBA's on-line survey of raspberry and blackberry pricing this spring, an increase in participation of more than 40% over our 2016 survey. Of those, about three dozen indicated they weren't growing caneberries in 2018 or did not complete the survey, so a little more than 100 responses are analyzed for this report. We had hoped for more responses, but in the current climate of heightened awareness of data privacy issues, many may have been reluctant to participate.

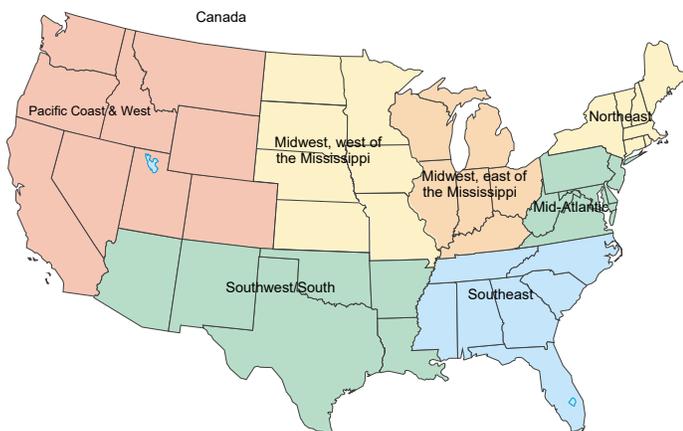
About the Participants

Location: Respondents were asked to identify their state or province. They were then grouped into one of eight farming regions as shown in the map below. The greatest number of responses came from the Midwest (east of the Mississippi) and Mid-Atlantic states. Factors influencing responses from each region include NARBA's ability to reach growers with the survey and the number of producers, especially direct market producers (our main target audience), in each area.

Caneberries raised: 41.3% grow blackberries, 20.2% grow raspberries, and 38.5% grow both raspberries and blackberries. When combining producers in the "both" category with those producing only blackberries/raspberries, a total of 83 respondents grow blackberries and 61 grow raspberries.

Experience: Respondents are an experienced group of

Location of Respondents	
Region	% of Total Response
Midwest, east of the Mississippi	25.0%
Mid-Atlantic	23.1%
Southeast	20.2%
Southwest/South	13.4%
Northeast	5.8%
Midwest, west of the Mississippi	4.8%
Pacific Coast & West	4.8%
Canada	2.9%



growers, raising caneberries for an average of 11.3 years. For blackberry producers, the average was 9.3 years, and for raspberry producers the average was 13 years.

Acres in caneberry production: Responding growers averaged 4.9 acres with the smallest being 0.02 acres and the largest producing on 55 acres. With an average size of 4.3 acres, blackberry operations tended to be larger than raspberry operations which averaged 2.5 acres.

Coverings: Almost 26% of surveyed caneberry producers reported using coverings for their crops during the season with 11.5% using high tunnels, 2.9% using shade cloth, 7.7% using netting, 1.9% using winter covers, and 1.9% mentioning other protective efforts such as RCA trellising and experimentation with pine trees for evaporative cooling.

Certifications: More than 42% of surveyed caneberry producers held some form of certification. The most commonly reported was Good Agricultural Practices (GAP) certification (22%). Other certifications included Certified Organic (5.8%), Good Handling Practice (GHP) certified (5.8%), and Certified Naturally Grown (2.9%). A few respondents specified additional certifications such as Global GAP, Primus GFS, or local certifications.

Types of Market Participants Use

This survey focused on direct-market prices – partly because growers have little control over prices in wholesale and processing markets. Few large producers participated, though quite a few growers (37.9%) indicated they sold both wholesale and retail. Our survey distinguished between “small” wholesale, primarily sales to local stores and restaurants and fruit stands, and “large” wholesale, or sales to supermarket chains or through major marketers. Approximately 47.6% sold all of their berries at retail and 14.6% sold all at wholesale. Most growers described their customers as “middle income” or “mixed.”

U-pick was the most popular marketing method among responding producers, with more than half (51.5%) utilizing this retail strategy. In fact, almost 19% percent of respondents indicated U-pick as being their only marketing strategy. Many producers sold their berries at retail through farm stands/prepare at the farm (41.7%), and farmer's markets (33.0%). Almost 39% of producers sold through small wholesale markets and 27% percent sold through large wholesale markets. Fifteen percent of respondents sold their berries by wholesale alone. A few also sold for processing, mostly wine. The table at the top of the next page shows the percentage of sales from each market broken down by region. For example, Canadian farmers report 50.0% from U-Pick retail, 11.7% of

% of Sales from Each Market by Region and Market						
Region	U-Pick	Pre-Pick/Farm Stand	Farmers Market	Wholesale (Small)	Wholesale (Large)	Processing
Canada	50.0%	11.7%	3.3%	33.3%	0.0%	1.7%
Mid-Atlantic	35.0%	35.2%	11.3%	12.9%	5.6%	0.0%
Midwest (east)	24.2%	12.7%	29.2%	11.7%	19.4%	2.7%
Midwest (west)	33.0%	23.0%	9.0%	34.0%	1.0%	0.0%
Northeast	42.5%	28.5%	5.7%	23.3%	0.0%	0.0%
Pacific West	5.0%	29.0%	36.0%	10.0%	20.0%	0.0%
Southeast	29.0%	4.0%	11.4%	4.1%	48.0%	3.3%
Southwest/South	61.1%	12.1%	13.2%	8.6%	5.0%	0.0%

their sales coming from pre-pick/farm stand retail, 3.3% from farmers market sales, 33.3% from small wholesale outlets, 0.0% from large wholesale, and 1.7% from processing. The table is more representative for regions where a significant number of responses were received.

Looking at Prices: Sales Units

We asked growers to report in the units they commonly sold in, as that is in itself of some interest. For PYO raspberries, 56.7% of respondents sell by the pound, 30.0% by the pint, and the rest by half-pint or quart. For PYO blackberries, 59.0% sell by the pound, 20.5% by the pint, 12.8% by the gallon, and 5.1% each by the ½ pint and quart.

Pre-picked berries (retail sales on the farm, at farmers markets, etc.) are far more often sold by container size (volume) than by weight. For raspberries, this is generally the pint; for blackberries, this can be the pint, quart, or gallon, depending mostly on region. There are strong regional differences.

Which is better? Considerations include cost of containers, labor, fairness, handling and grading practices, and customer perceptions and expectations.

The Berry Prices

Averages and comparisons are difficult to make with confidence, especially for conversions between weight and volume, and there can be great differences in how high buckets or cups are mounded up.

For prepick (retail) **raspberries**, we converted half-pints to pints (though this tended to give a high pint price), and figured a pint as 3/4 of a pound. The average price was \$6.46/pint (\$8.42/lb). Prices varied from \$3.00- \$12.00/pint (\$2.00- \$16.00/lb). A majority (58.0%) of growers sold for \$5.00- \$8.00/pint.

For pre-pick (retail) **blackberries**, we converted half-pints to pints, and assumed a gallon contained 8 dry pints and a pint weighed 3/4 lb (though this may be high), coming up with an average price of \$4.86/pint (\$6.46/lb). Prices ranged from \$1.50-\$12.00/pint (\$2.00-\$16.00/lb). Here, the lowest-pricing third of growers sold for \$1.50-3.50/pint, the middle third for \$3.75-5.50/pint, and the top third for \$6.00-12.00/pint. There are strong regional differences – see the tables at right. *A Table of Responses in the Full Report gives the prices and units used by each (anonymous) grower in each region for each market.*

Average Price by Region by Pint and Pound				
Region	Raspberries		Blackberries	
	\$/pint	\$/lb	\$/pint	\$/lb
Canada	\$ 4.98	\$ 6.64	N/A	N/A
Mid-Atlantic	\$ 5.40	\$ 7.20	\$ 4.45	\$ 5.93
Midwest, east of the Mississippi	\$ 4.81	\$ 6.42	\$ 3.86	\$ 5.15
Midwest, west of the Mississippi	\$ 4.63	\$ 6.17	\$ 4.21	\$ 5.61
Northeast	\$ 4.41	\$ 5.88	\$ 2.75	\$ 3.67
Pacific Coast & West	\$ 6.79	\$ 9.06	\$ 7.00	\$ 9.33
Southeast	\$ 5.63	\$ 7.50	\$ 4.91	\$ 6.55
Southwest/South	\$ 7.86	\$ 10.48	\$ 4.03	\$ 5.37

Average Blackberry Price per Pound by Market and Region					
Region	U-Pick	Pre-pick/ Farm Stand	Farmers Market	Whole- sale (small)	Whole- sale (large)
Canada	N/A	N/A	N/A	N/A	N/A
Mid-Atlantic	\$ 4.83	\$ 6.35	\$ 7.90	\$ 4.80	\$ 4.39
Midwest (east)	\$ 3.49	\$ 4.96	\$ 6.28	\$ 5.43	\$ 4.21
Midwest (west)	\$ 4.64	\$ 5.28	\$ 10.67	\$ 5.25	N/A
Northeast	\$ 2.67	\$ 4.00	\$ 4.00	N/A	N/A
Pacific Coast/West	\$ 3.50	\$ 7.83	\$ 16.00	\$ 10.40	N/A
Southeast	\$ 3.58	\$ 4.69	\$ 5.67	\$ 2.53	\$ 3.46
Southwest/South	\$ 4.33	\$ 8.00	\$ 8.04	\$ 3.58	\$ 3.92

Average Raspberry Price per Pound by Market and Region					
Region	U-Pick	Pre-pick/ Farm Stand	Farmers Market	Whole- sale (small)	Whole- sale (large)
Canada	\$ 2.75	\$ 10.00	\$ 10.00	\$ 5.70	N/A
Mid-Atlantic	\$ 5.12	\$ 7.19	\$ 10.33	\$ 6.33	\$ 6.67
Midwest (east)	\$ 4.28	\$ 6.52	\$ 9.04	\$ 6.41	\$ 4.00
Midwest (west)	\$ 6.00	\$ 4.67	\$ 8.00	\$ 5.56	N/A
Northeast	\$ 4.00	\$ 6.67	\$ 4.00	\$ 9.00	N/A
Pacific Coast/West	\$ 3.50	\$ 8.67	\$ 12.00	\$ 9.29	N/A
Southeast	\$ 4.75	\$ 4.50	\$ 16.00	N/A	N/A
Southwest/South	\$ 10.00	\$ 11.33	\$ 12.00	\$ 6.67	N/A

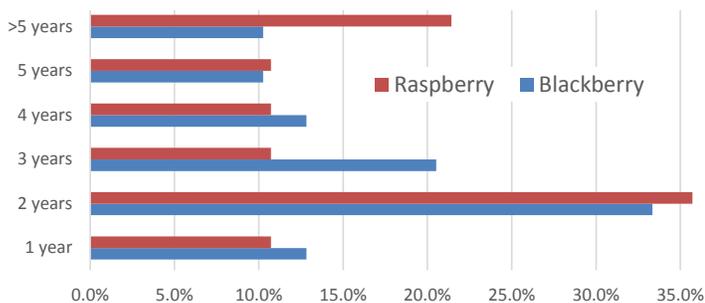
Are Prices Changing?

The average prices for blackberries and raspberries have increased slightly, compared to our earlier surveys. It is not clear whether changes reflect actual rising prices, changes in the make-up of who participated in the survey, or simply issues with our methodology.

Most growers report very stable prices. This year, 76.0% of blackberry producers were planning to keep the same prices, while 4.0% were lowering prices. For raspberries, an even greater percentage (82.8%) of producers reported plans to keep the same prices in 2018.

We asked those who are NOT raising prices how long they'd had these prices. The bar graph above shows their responses. A few have had the same prices for as long as 10-12 years!

How long have you had these prices?



Pricing and Sales Strategies

Many growers indicated that they offer discounts for larger quantities or seconds. A few examples:

- We offer bulk pricing ... \$5 per pint, 6 pints for \$24 or \$40 for 12 pints. We also sell seconds to wineries and for jams at \$1.50-\$2.50 per pound depending on quantity.
- We reduce price for repeat pickers later in season.
- We offer bulk discount at \$4.50/pint if you buy 10 or more pints. Sometimes we run discounts on blackberries when they are at peak – \$4/pint instead of \$5, or \$3.50 U-pick pints instead of \$4.50.

Answering Consumer Questions

One question in the survey asked, “We know consumers often ask some hard questions. Can you share with us some common/tough questions you get from consumers and how you answer them?”

The questions mentioned most commonly were along the lines of “Are you organic?”, “Do you spray?” A few sample responses are below. (Additional responses to this and other questions are in the Full Report).

- We spray as infrequently as we can but this part of the state has an extremely high insect pressure. We wouldn't have a crop at all if we didn't spray some.
- We tell the customer we are traditional farmers using the recommended methods. We may mention some of the diseases and pests that make growing raspberries without pesticides difficult to impossible. Most are very understanding, but if not that is ok.

- I say, “I would love to be organic and planned to be when I started out but with invasive species there is no way I can produce quality fruit that you would want to pick.” I then go ask them to go taste some fresh off the cane and decide for themselves.
- We feel very strongly about not spraying anything with chemical herbicides or pesticides. Sometimes this leaves us with losses from disease or pest problems but we know we don't want chemicals on our food and the majority of our customers feel the same way.
- We offer to show them our spray records. A few will look at our records but none have declined to pick.

Challenges and Barriers to Success

Many growers listed several challenges. To look at the responses, we grouped them into keyword categories. Weather was mentioned most (23 responses), followed by labor (21) and SWD (13). Responses for pests, non-SWD or not specific (12), disease (9), weeds (8) and wildlife/birds (5) were also common. The total of all pest/disease responses, including SWD, is 47. Pests/diseases in general could therefore be considered the greatest concern.

Time was an issue for many: not enough hours in the day, getting older, getting to market quickly, time for food safety regulations, time from expense to revenue.

Marketing concerns included low pricing at stores, marketers lowering prices before it's necessary, low prices, need for new markets, consumers not understanding agriculture.

Others included post-harvest cooling, short shelf life, matching harvest with demand, berry sweetness. need for advice/information on varieties, fertility management, and other production issues.

Resources needed

Among the resources growers asked for were:

- More information opportunities: local workshops, videos, manuals, technical assistance with questions
- More production information. Some specified topics were on weeding organic raspberries, viruses, bird nets and support structures at lower costs, attract-and-kill SWD control
- Research on white drupelet, nutrient needs, black raspberry varieties
- Better guest worker laws and programs
- State-level pricing info, weekly market posts, better/more diverse markets
- Health benefit information and recipes for consumers

Thank you again to all who participated in this survey. A special thanks to Jennie Popp and Leah English at the University of Arkansas, who helped design the survey and analyzed the results.

The full 10-page report (pdf file) of the survey, including a Table of All Responses is available by request from NARBA by emailing info@raspberryblackberry.com.