

2018 New York State Berry Market Analysis: Pricing Information of Local Berries

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In 2019, Cornell Food Industry Management Program in conjunction with the NY Berry Growers' Association distributed a berry pricing survey to 414 commercial berry growers across New York State. The survey was distributed to make recent statewide berry pricing information available to commercial berry growers so they may be able to better evaluate the economic returns of their various berry crops. The information collected will be able to see how berry pricing trends have evolved since 2013, when the most recent NY state berry pricing survey was conducted. Information from the previous studies conducted in 2009 and 2006 will also be included.

The survey distributed in 2019 was the same pricing survey commercial berry producers received in 2009. Producers were asked to list the prices they received during the 2012 season for four major berry crops (strawberries, blueberries, brambles (raspberries, blackberries), and ribes (currants, gooseberries)) – all currently being grown in NY state. Growers were also given the opportunity to list other berry crops, and the related pricing information, on the survey. Pricing information was requested for three markets; pick-your-own (PYO), wholesale, and retail venues (farmers market, farm stores, fruit stands). Producers were also asked if they used their berry crops in value added products, and if they were organically certified.

Of the 124 survey respondents 7 indicated they no longer produce berries at any level while 2 respondents indicated their entire 2018 berry crop failed. 117 respondents reported producing at least one type of the berries in question representing 45 counties (Table 1). Erie, Monroe, and Tioga counties had the highest number of respondents with 7, 7, and 6 respectively. 30 respondents indicated they are organically certified, more than double the number of organically certified respondents from 2012 (12).

Table 1: Number of survey respondents and countries represented in years 2006, 2009, 2012, and 2018

	2006	2009	2012	2018
Total Growers	48	162	117	117
Conventional Growers	--	157	97	87
Organic Growers	--	5	12	30
Counties Represented	34	48	37	45

Out of the 117 respondents currently producing berries 62 of respondents reported producing two or more types of berries, accounting for roughly 53% of growers. Of the 55 respondents producing only one type of berry 40 grew only blueberries, 12 grew only strawberries, and 3 grew only raspberries.

Currants, gooseberries, and juneberries were also reported by a few respondents. 3 reported growing currants, 3 reported growing gooseberries, and 2 reported growing juneberries.

48% of the respondents reported their total farm size, measured in acreage, were 80 total acres or less (Table 2). 47% of the respondents reported their total farm size to be 100 acres or greater.

Table 2: Total farm size, measured in acreage, and number of respondents, 2018

Total Farm Size - Acreage	Number of Farm Respondents	Percentage
1 to 20	18	15%
21 to 40	13	11%
41 to 60	12	10%
61 to 80	12	10%
81 to 100	11	9%
101 to 200	15	13%
>201	19	16%
No Acreage Reported	17	15%
Total	117	100%

44% of respondents reported the area on their farms, measured in acreage, dedicated solely to berry production to be 3 acres or less (Table 3). Berry production acreage of 4 to 10 acres account for 27%, berry production acres measuring greater than 11 acres account for 18% of respondents, and 11% of respondents did not provide information on how many acres are dedicated to berry production.

Table 3: Berry production acres and number of respondents, 2018

Berry Farm Size - Acres	Number of Farm Respondents	Percentage
<1	22	19%
1 to 3	29	25%
4 to 6	21	18%
7 to 10	11	9%
11 to 20	15	13%
>20	6	5%
No observations	13	11%
Total	117	100%

38 of growers indicated they market their crops through a single venue, 25 market their berries through only PYO, and 13 market their berries in only retail settings. 67.5% of respondents indicated they used at least two types of marketing processes for their berries. The primary method of marketing berries by the respondents in 2018 were PYO and retail respectively (Table 5). 26 of respondents reported using Value Added methods in 2018.

Table 5: Number of commercial growers using various marketing venues 2006, 2009, 2012, and 2018

Marketing Strategy	2006	2009	2012	2018
PYO	83	70	74	93
Wholesale	67	39	39	47
Retail	85	81	83	89
Value Added	26	23	22	26

**A farm is counted as having participated in retail operations if they participated in one or more of the following: farm store, fruit stand, farmers market, or other retail practices*

Blueberries are shown to have the highest number of participants in PYO, wholesale, and retail operations with 68, 30, and 45 operations respectively (Table 6). The second most active berry crop operating in all three categories (PYO, wholesale, and retail) are strawberries. June-bearing strawberries (JB) were significantly more

popular than Day-Neutral (DN) strawberries with 49 and 11 producers reporting production respectively. 8 strawberry producers failed to identify the specific type of strawberries they produced. Regarding summer raspberries, red summer raspberries were the most popular (36) with black (16) and purple (5) following. 6 raspberry producers failed to specify the type of raspberries produced.

Table 6: Berry crops by marketing venues, 2018

Berry Crop	Number of Growers Using Venue			Percent of Growers Using Venue			Total Growers
	PYO	Wholesale	Retail	PYO	Wholesale	Retail	
Strawberries	45	26	29	75%	43%	48%	60
<i>JB</i>	41	21	45	84%	43%	92%	49
<i>DN</i>	10	5	10	91%	45%	91%	11
<i>Not Specified</i>	4	3	8	50%	38%	100%	8
Summer Raspberries	31	14	19	72%	33%	44%	43
<i>Red</i>	24	11	30	67%	31%	83%	36
<i>Black</i>	14	5	15	88%	31%	94%	16
<i>Purple</i>	4	1	4	80%	20%	80%	5
<i>Not Specified</i>	5	3	6	12%	7%	14%	6
Fall Raspberries	20	8	13	67%	27%	43%	30
Blackberries	9	6	9	45%	30%	45%	20
Blueberries	68	30	37	78%	34%	43%	87
Currants	3	0	2	75%	0%	25%	4
Gooseberries	3	0	1	75%	0%	25%	4
Juneberries	2	0	1	100%	0%	50%	2

Note: For the following information specifically regarding pricing information of berries the minimum and maximum prices are determined by the report of a single farm, whereas the average price includes all farms in the survey.

Blueberries

87 growers reported producing blueberries in 2018, a 17% increase from 2012 (74). 39 counties were represented with Washington (5) and Saratoga (5) counties having the most responses. Of those who produce blueberries 78% use PYO marketing strategies, which was by far the most popular way for blueberry producers to market their product. Retail was the second most utilized form of marketing with 42% of respondents utilizing some form of retail services.

The average price per pound of PYO, wholesale, and retail blueberries have all increased since 2012, with increases of 30%, 11%, and 11% respectively. The most expensive retail price was observed from a farm utilizing farmers markets as one retail strategy. The minimum prices for both wholesale and retail have increased since 2012 while the minimum price for PYO has decrease since 2012.

Table 7: Comparison of 2006, 2009, 2012, and 2018 pricing for NYS blueberries, \$/lb.

Marketing	Minimum				Average				Maximum			
	2006	2009	2012	2018	2006	2009	2012	2018	2006	2009	2012	2018
PYO	\$1.00	\$0.99	\$1.10	\$1.00	\$1.49	\$2.21	\$2.17	\$2.83	\$2.25	\$10.00	\$9.00	\$13.33
Wholesale	\$1.75	\$1.30	\$2.00	\$1.99	\$2.39	\$2.99	\$3.08	\$3.44	\$3.00	\$8.00	\$5.00	\$8.44
Retail	\$2.17	\$0.75	\$2.00	\$2.30	\$3.88	\$4.21	\$4.84	\$5.41	\$5.33	\$12.00	\$12.00	\$18.64

**Retail is the price obtained using data for all reported retail operations; farm store, fruit stand, farmers market, and other reported retail operations; and averaging the data into one category meant to represent all retail operations*

Strawberries

60 growers reported producing strawberries in 2018 in 27 counties with Erie (6) and Monroe (5) reporting the most. The majority of producers utilized PYO (75%) and retail (48%) marketing strategies for their selling their strawberries. 51% of all respondents reported producing strawberries.

Since 2012 the average price PYO, wholesale, and retail have all increased, with increases of 29%, 17%, and 37% respectively (Table 8). The largest increase in prices were prices related to retail with the average price increasing by \$1.39 per pound.

49 growers reported producing June-bearing (JB) strawberries in 2018 with average pricing of \$2.24/lb. PYO, \$1.17/lb. wholesale, and \$2.01/lb. retail. PYO prices ranged from to \$1.33/lb. to \$6.00/lb., wholesale ranged from \$1.2/lb. to \$6.67/lb., and retail ranged from \$2.00/lb. to \$8.25/lb.

11 growers reported producing day-neutral (DN) strawberries in 2018 with average pricing of \$2.67/lb. PYO, \$1.41/lb. wholesale, and \$2.73/lb. retail. Day-neutral PYO prices ranged from \$2.1/lb. to \$5/lb., wholesale ranged from \$2.32/lb. to \$3.66/lb., and for retail ranged \$4.00/lb. to \$6.66/lb.

Table 8: Comparison of 2006, 2009, 2012, and 2018 pricing for NYS strawberries, \$/lb.

Marketing	Minimum				Average				Maximum			
	2006	2009	2012	2018	2006	2009	2012	2018	2006	2009	2012	2018
PYO	\$0.75	\$0.83	\$1.00	\$1.00	\$1.319	\$1.76	\$2.07	\$2.68	\$2.80	\$3.99	\$4.50	\$6.00
Wholesale	\$1.17	\$1.50	\$1.50	\$3.60	\$2.00	\$2.30	\$2.34	\$2.74	\$1.60	\$6.00	\$6.00	\$6.67
Retail	\$1.66	\$1.80	\$1.00	\$2.30	\$2.38	\$3.40	\$3.72	\$5.11	\$3.33	\$7.50	\$7.50	\$8.00

**Retail is the price obtained using data for all reported retail operations; farm store, fruit stand, farmers market, and other reported retail operations; and averaging the data into one category meant to represent all retail operations*

Raspberries

53 respondents reported producing raspberries in. Raspberry varieties were sorted into two main types: summer-fruiting and fall-fruiting. Of the 50 respondents 17 grew only summer-fruiting raspberries, 7 grew only fall-fruiting raspberries, and 23 grew both (Table 9a).

Table 9a: Comparison of numbers of raspberry growers and types of raspberries grown, 2006, 2009, 2012, 2018

Year	Total Growers	Summer-Fruiting Only	Fall-Fruiting Only	Both
2006	34	8	8	18
2009	81	19	11	51
2012	88	21	9	58
2018	53	20	7	23

Summer-fruiting raspberries

43 growers reported producing summer-fruiting raspberries in 2018 from 27 counties with Chautaugua (4) having the most responses.. 72% of the respondents used PYO, 33% used wholesale operations, and 44% utilized retail marketing to sell their raspberries. The average price of PYO and retail increased 5% and 11% respectively since 2012. The wholesale price of raspberries decreased since 2012 by 21%. Summer-fruiting PYO raspberries prices ranged from \$1.33/lb. to \$9.00/lb., while retail pricing ranged from \$0.75/lb. to \$18.66/lb. (Table 9b).

Table 9b: Comparison of 2006, 2009, 2012, and 2018 pricing for NYS summer raspberries, \$/lb.

Marketing	Minimum				Average				Maximum			
	2006	2009	2012	2018	2006	2009	2012	2018	2006	2009	2012	2018
PYO	\$2.00	\$1.67	\$2.00	\$1.33	\$2.72	\$4.12	\$3.92	\$4.14	\$3.64	\$15.33	\$9.50	\$9.00
Wholesale	\$2.44	\$2.00	\$3.30	\$2.00	\$5.04	\$4.33	\$6.14	\$4.84	\$7.11	\$12.00	\$12.00	\$9.30
Retail	\$2.00	\$1.50	\$3.00	\$0.75	\$7.09	\$5.31	\$7.32	\$8.11	\$13.33	\$13.51	\$15.00	\$18.66

**Retail is the price obtained using data for all reported retail operations; farm store, fruit stand, farmers market, and other reported retail operations; and averaging the data into one category meant to represent all retail operations*

In previous reports on survey data from 2012, 2009, and 2006 variations between the type of summer-fruiting raspberry and sales prices. Like previous years purple raspberries had a lower average sales price for both wholesale and retail compared to red and black raspberries (Table 9c). However, unlike previous years PYO purple raspberries had the highest price of the three. Red raspberries had the most growers (Table 6). Red raspberries saw the highest average price for retail marketing of \$8.22/lb. Black raspberries saw the cheapest minimum price for PYO at \$0.75/lb. This is an extreme outlier compared to the other sellers of black raspberries.

Table 9c: 2018 pricing for NYS red, black, and purple raspberries, \$/lb.

Type	Minimum			Average			Maximum		
	PYO	Wholesale	Retail	PYO	Wholesale	Retail	PYO	Wholesale	Retail
Red	\$2.50	\$2.00	\$3.00	\$4.32	\$4.88	\$8.22	\$ 9.00	\$9.30	\$18.66
Black	\$2.50	\$3.25	\$0.75	\$4.28	\$5.67	\$7.23	\$ 9.00	\$8.22	\$17.33
Purple	\$4.75	\$5.35	\$4.50	\$5.18	\$5.35	\$5.71	\$ 6.00	\$5.35	\$10.00

**Retail is the price obtained using data for all reported retail operations; farm store, fruit stand, farmers market, and other reported retail operations; and averaging the data into one category meant to represent all retail operations*

Fall-Fruiting Raspberries

30 growers reported producing fall fruiting raspberries in 2018 from 21 counties with Chautaugua (3), Erie (3), and Suffolk (3) counties having the most responses. 67% reported selling via PYO, 43% reported selling via retail operations, and 23% reported selling via wholesale. The minimum PYO price per pound fell to \$1.33/lb.

from \$2.00/lb. since 2012 (Table 10). However, the average price per pound for PYO rose to \$4.54/lb. in 2018. The average price for wholesale and retail operations increased to \$5.91 and \$8.74 respectively.

Table 10: Comparison of 2006, 2009, 2012 and 2018 pricing for NYS fall raspberries, \$/lb.

Marketing	Minimum				Average				Maximum			
	2006	2009	2012	2018	2006	2009	2012	2018	2006	2009	2012	2018
PYO	\$2.00	\$1.67	\$2.00	\$1.33	\$2.99	\$3.88	\$3.81	\$4.54	\$5.82	\$8.99	\$8.99	\$9.00
Wholesale	\$2.44	\$1.77	\$3.00	\$3.60	\$5.21	\$4.79	\$5.53	\$5.91	\$8.00	\$12.00	\$12.00	\$9.30
Retail	\$2.00	\$1.50	\$3.57	\$4.00	\$6.93	\$6.54	\$7.66	\$8.74	\$12.00	\$13.51	\$15.00	\$18.66

**Retail is the price obtained using data for all reported retail operations; farm store, fruit stand, farmers market, and other reported retail operations; and averaging the data into one category meant to represent all retail operations*

Blackberries

20 respondents reported producing blackberries in 2018 from 14 counties with Erie (4) having the most respondents. 45% of respondents used PYO operations, 30% used wholesale operations, and 45% used retail operations. The minimum price per pound of both PYO and wholesale blackberries have stayed the same since 2012 while the minimum price for retail blackberries has increased 75% since 2012 (Table 11). The average price of all three main selling categories have increased since 2012. However, the maximum price per pound for all three selling strategies have decreased since 2012.

Table 11: Comparison of 2009, 2012, and 2018 pricing for NYS blackberries \$/lb.

Marketing	Minimum			Average			Maximum		
	2009	2012	2018	2009	2012	2018	2009	2012	2018
PYO	\$2.33	\$2.00	\$2.00	\$3.89	\$4.45	\$4.69	\$6.67	\$9.50	\$9.00
Wholesale	\$1.77	\$2.50	\$2.49	\$4.69	\$5.58	\$5.72	\$12.00	\$12.00	\$9.30
Retail	\$0.93	\$2.00	\$3.50	\$6.26	\$7.07	\$7.94	\$13.51	\$13.50	\$13.10

**Retail is the price obtained using data for all reported retail operations; farm store, fruit stand, farmers market, and other reported retail operations; and averaging the data into one category meant to represent all retail operations*

***No data was collected in 2006 for NYS blackberries*

Ribes (currants & gooseberries)

Currants

4 respondents reported producing currants in New York in 2018. 75% of respondents reported using PYO strategies while 50% reported using retail operations, no currant producers reported using wholesale selling strategies. The average price per pound of PYO has increased by 11% while the average price per pound of retail currants decreased by 9% (Table 12).

Table 12: Comparison of 2009, 2012, and 2018 pricing for NYS currants \$/lb.

Marketing	Minimum			Average			Maximum		
	2009	2012	2018	2009	2012	2018	2009	2012	2018
PYO	\$1.95	\$2.00	\$2.99	\$3.97	\$4.94	\$5.49	\$8.99	\$9.00	8.99
Wholesale	\$1.00	--	--	\$3.33	--	--	\$6.66	--	--
Retail	\$2.50	\$4.67	\$4.50	\$5.01	\$6.92	\$6.25	\$10.66	\$9.75	\$8.00

**Retail is the price obtained using data for all reported retail operations; farm store, fruit stand, farmers market, and other reported retail operations; and averaging the data into one category meant to represent all retail operations*

***No data was collected in 2006 for NYS currants*

Gooseberries

4 growers reported producing gooseberries in 2018. 75% of respondents reported using PYO and 25% reported using retail operations to sell their gooseberries while zero used wholesale operations. Both the minimum and average price per pound of PYO increased from 2012 by 25% and 31% respectively (Table 13). The minimum, average, and maximum price of retail is shown to be the same price (\$4.50/lb.) as only one respondent reported using retail operations to sell their gooseberries.

Table 13: Comparison of 2009, 2012, and 2018 pricing for NYS gooseberries \$/lb.

Marketing	Minimum			Average			Maximum		
	2009	2012	2018	2009	2012	2018	2009	2012	2018
PYO	\$1.95	\$2.00	\$2.50	\$3.40	\$4.17	\$5.49	\$8.95	\$8.99	8.99
Wholesale	\$1.67	\$2.00	--	\$3.89	\$2.00	--	\$6.66	\$2.00	--
Retail	\$2.50	\$4.00	\$4.50	\$4.84	\$6.29	\$4.50	\$10.66	\$9.00	\$4.50

*Retail is the price obtained using data for all reported retail operations; farm store, fruit stand, farmers market, and other reported retail operations; and averaging the data into one category meant to represent all retail operations

**No data was collected in 2006 for NYS currants

Note: 2 respondents reported producing juneberries, 2 reported producing cherries, 1 reported producing apricots, 1 reported producing plums, 1 reported producing yellow raspberries, 1 reported producing aronia (chokeberries), and 1 reported producing table grapes. Since so few reported producing these crops the price analysis has not been included in this report.

Overall Price Analysis Adjusted for Inflation

The average rate of inflation since 2012 has been 1.50% annually. That means \$1.00 in 2012 has the same purchasing power as \$1.09 in 2018. In order to analyze if the sales price of berries in New York State have kept pace with the inflation rate the reported average price per pound of each berry and sales method is reported below (Table 14). The column titled "Reported Average Price 2018" shows the average price using the data obtained from the 2018 price surveys. The column titled "Predicted Average Price" is the predicted sales price assuming the price increased at the same rate as the inflation rate. To calculate this information the average reported sales price from the 2012 berry price survey was normalized by the inflation rate of 1.50% over 6 years to show what the 2018 equivalent sales price would be. The column "Difference" is simply the:

$$\text{Reported Average Price} - \text{Predicated Average Price} = \text{Difference}$$

If the resulting number is positive (in green) than the average reported sales price in 2018 is greater than that of the predicted sales price. If the difference is negative (red) than the average reported sales price in 2018 is less than that of the predicted sales price. Essentially, if the number is positive than in theory the average berry grower would be receiving higher revenue than they were in 2012, while if the number is negative then the average berry grower would be receiving lower revenues than they were in 2012. This is assuming all other costs increased at the same rate as the inflation rate. Furthermore, the predicted price does not take into account any other market factors such as increased demand, organic factors on pricing, the pricing structure of other producers, etc.

Table 14: Reported Average Price per Pound vs. Inflation Adjusted Price per Pound Predictions

		2018 Average Price	2012 Average Price Adjusted for Inflation	Difference
Blueberries				
	PYO	\$ 2.83	\$ 2.37	\$ 0.46
	Wholesale	\$ 3.44	\$ 3.37	\$ 0.07
	Retail	\$ 5.41	\$ 5.29	\$ 0.12
Strawberries				
	PYO	\$ 2.68	\$ 2.26	\$ 0.42
	Wholesale	\$ 2.74	\$ 2.56	\$ 0.18
	Retail	\$ 5.11	\$ 4.07	\$ 1.04
Summer Fruiting Raspberries				
	PYO	\$ 4.14	\$ 4.29	\$ (0.15)
	Wholesale	\$ 4.84	\$ 6.72	\$ (1.88)
	Retail	\$ 8.11	\$ 8.01	\$ 0.10
Fall-Fruiting Raspberries				
	PYO	\$ 4.54	\$ 4.17	\$ 0.37
	Wholesale	\$ 5.91	\$ 6.05	\$ (0.14)
	Retail	\$ 8.74	\$ 8.38	\$ 0.36
Blackberries				
	PYO	\$ 4.69	\$ 4.87	\$ (0.18)
	Wholesale	\$ 5.72	\$ 6.10	\$ (0.38)
	Retail	\$ 7.94	\$ 7.73	\$ 0.21

*2012 average price adjusted for inflation was calculated using an average inflation rate of 1.50%. Using the following equation; $1.015^6 * 2012 \text{ average price} = 2012 \text{ average price adjusted for inflation}$; we found the 2012 prices adjusted for inflation. The column titled "Difference" is simply: $2018 \text{ Average Price} - 2012 \text{ Average Price Adjusted for Inflation} = \text{Difference}$. If the difference is positive (green text) then the average sales price in 2018 was greater than the 2012 average price adjusted for inflation. If the difference is negative (red text and in ()'s) then the average sales price in 2018 was less than the 2012 average price adjusted for inflation.

** Retail is the price obtained using data for all reported retail operations; farm store, fruit stand, farmers market, and other reported retail operations; and averaging the data into one category meant to represent all retail operations

Both blueberries and strawberries are shown to have an average sales price for all sales methods higher than the predicted sales price. This means the average producer of blueberries and strawberries could be making more in 2018 on than they were in 2012. Summer-fruited raspberries, fall-fruited raspberries, and blackberries each have reported sales prices for 2018 that are less than the predicted sales price when adjusting for inflation.

Conclusion

The total number of growers participating in the 2018 berry pricing survey, who are currently producing berries, stayed the same since 2012 with 117 participants. The average size of berry production of respondents has increased from about 3 acres in 2012 to a little more than 6 acres in 2018. It is important to note 62% of respondents reported having a farm with berry producing less than or equal to 6 acres.

This survey has indicated the prices of berries in New York State have continued to increase on average. A notable exception was the average price of wholesale summer-fruited raspberries has decreased since 2012. Furthermore, the average retail price per pound of ribes have also decreased since 2012. It is important to note, that when adjusting for inflation, the average reported sales price for all forms of selling blueberries and strawberries were greater than the predicted average sales price.

However, the 2018 reported sales prices for PYO and wholesale summer-fruited raspberries, wholesale fall-fruited raspberries, and PYO and wholesale blackberries were all less than the predicted inflation adjusted sales prices. Producers of these crops may want to analyze their sales pricing structures. If demand for these products is high enough producers may want to consider increasing their sales prices at least enough to cover the cost of inflation since 2012.

For producers selling their berries at a price significantly less than the average sales price found in New York State they may want to consider raising their prices. Data collected from 2006, 2009, 2012, and 2018 show a large amount of producers are pricing their berries significantly lower than the average prices found in the state. If demand, as well as local market indicators, suggest the seller could increase their sales prices they are advised to do so. By selling crops at a significantly lower price than the average state price/lb. it is difficult for producers to receive fair compensation for their work.

Thank you to all NYS Commercial berry growers who took the time to report their prices via our 2012 pricing survey. We hope this information is valuable to you as you set your price for the future seasons. Thank you again!

OTHER A.E.M. EXTENSION BULLETINS

EB No	Title	Fee (if applicable)	Author(s)
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