Analytical Report — July 2026

UKRAINIAN BERRIES ASSOCIATION

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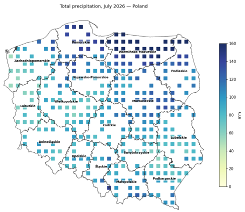
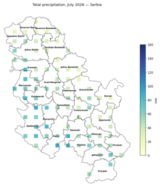
In this report:

- **July weather in Ukraine:** a milder-than-last-year July (20.7°C on average, -2.4°C vs 2025) and 69 mm of rainfall (+13%) — a favourable, moderately wet backdrop for fruit fill.
- **Blueberry has not found a seasonal floor:** spring frosts cut the domestic crop, the market is thin, and the price swung all month (135–600 UAH/kg) instead of the usual summer slide. Mass berries did hit their trough: raspberry $\approx$170–200, strawberry closed its season.
- **Climate pressure on competitors:** Serbia's 2026 raspberry crop is expected 20–30% below normal (drought), and Poland is at peak picking amid low purchase prices.
- **Record raspberry export revenue:** €250.8 million over twelve months of the 2025/26 season (+65% y/y) — an all-time high; a deep bilberry deficit (-69% by volume) and modest shipments of other frozen berries (Eurostat, data through May 2026).
- **Strong external demand:** the Serbian shortfall and Poland's uneven crop create a favourable price window for Ukrainian frozen-berry exports in the 2026/27 season.
- **Regulation, August radar and trade fairs:** the restored Ministry of Agrarian Policy, the EU cut of the ethephon MRL for blueberry (from 19 August), and leading industry fairs for export planning.

Climate impact on the season in competitor countries



Poland: July rainfall total — about 103 mm on average



Serbia: about 50 mm over July

- **Poland** is at the height of raspberry and blueberry picking. The Lublin Voivodeship (the key industrial-raspberry region) supplies the bulk of the processing crop, yet growers complain of **low peak-season purchase prices** and a shortage of harvest labour. Plantation health is uneven after the April frosts. This restrains new plantings and weakens Ukraine's main competitor on the frozen-berry market.
- **Serbia's** 2026 raspberry crop is expected to be **20–30% below normal** — a consequence of last year's drought. The frozen-raspberry purchase price is €3.85–4.00/kg, and processors often pay farmers in instalments, signalling financial strain in the sector. Arilje (the "raspberry capital") yields up to 15–20 k t a year, mostly for freezing for the EU.

Reduced supply in the two key competitors is a favourable price window for Ukrainian frozen-raspberry exporters in the 2026/27 season.

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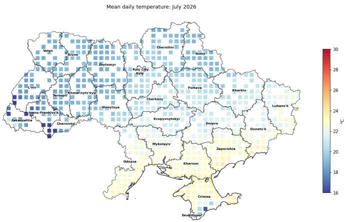
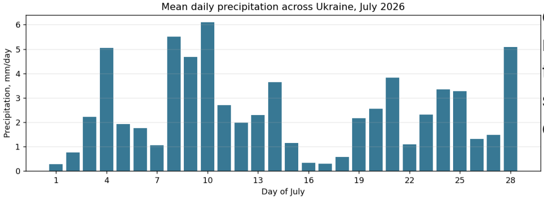
July weather in Ukraine: temperatures and moisture supply



Mean daily temperature in July by region



Key indicators of the month (ERA5)

20.7°C
mean daily
(-2.4°C vs July 2025)

69 mm
rainfall this month
($+13$% vs July 2025)

none
frost risks this month

July 2026 was noticeably milder than last year: a mean daily temperature of **20.7°C** (2.4°C below July 2025), with no prolonged extreme-heat waves. Rainfall totalled **69 mm**, about 13% more than a year earlier, unevenly distributed: a few downpours supplied most of the moisture. Moderate warmth and ample moisture favoured the fill and ripening of raspberry, blueberry and late strawberry and eased irrigation needs; the local risk after downpours was berry cracking and grey mould.

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Market context: industry media review, Ukraine and the EU

Ukraine

- **Blueberry unstable this year:** spring frosts (mainly in Volyn) cut the domestic crop, the market is thin, and the price **cannot find a seasonal floor** — swinging all month instead of the usual summer slide; by industry estimates it runs ≈30% above last year.
- **Mass berries — seasonal low:** the domestic harvest kept wholesale raspberry at ≈170–200 UAH/kg and strawberry closed its season at minimum prices. Raspberry rose 10–15% versus last year, yet the gross crop is expected to be larger.
- **Active exports:** strong external demand for Ukrainian raspberry and blueberry, including from Poland and Turkey; Volyn blueberry is valued at ≈€5–6/kg for export.

European Union

- **The Serbian raspberry shortfall** (an expected $-20...-30$%) is pushing EU processors to seek alternative frozen-berry suppliers — a window of opportunity for Ukraine. Purchase prices in Serbia are €3.85–4.00/kg amid delayed settlements with farmers.
- **Poland at peak harvest:** despite its status as the EU's leading raspberry and blueberry producer, growers are disappointed by low purchase prices this season; part of the crop goes to freezing at modest value.
- **Regulatory trend:** from 19 August 2026 the cut of the **ethephon** MRL for blueberry to the limit of quantification takes effect (Regulation (EU) 2026/215) — exporters should review treatment programmes in good time.

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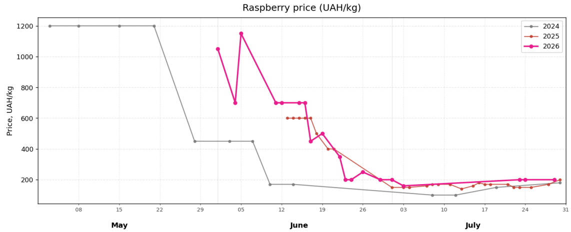
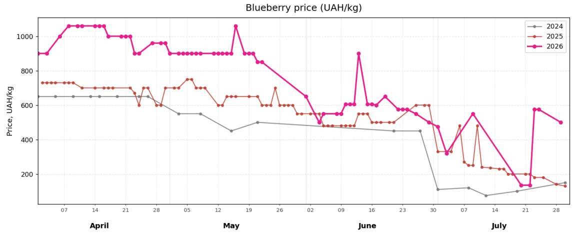
Retail berry price analysis, Ukrainian market





Raspberry. After the June collapse the price reached its seasonal trough and held steady at ≈**170–200 UAH/kg** through July — close to July 2025 and slightly above 2024. Despite the low retail price, the export economics of frozen berry remain attractive.

Blueberry. The season's key difference: domestic berry **has not found a seasonal floor** — instead of July's usual slide to 130–200 UAH/kg, the price **swung sharply** all month (135–600 UAH/kg). The market is thin after the frost-reduced crop, so the price keeps jumping; imported blueberry traded separately, around 550 UAH/kg.

Strawberry closed the season at seasonal-low prices: ≈80–120 UAH/kg (minimum — down to 60).

Frozen raspberry exports to the EU

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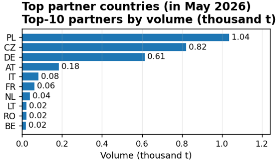
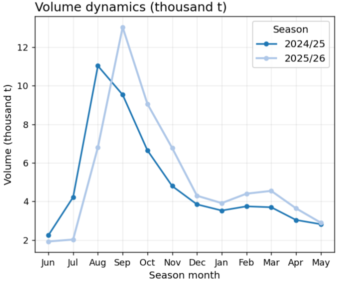
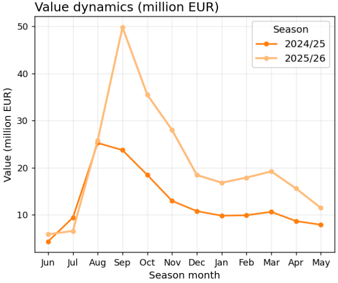
Key indicators (as of May 2026)

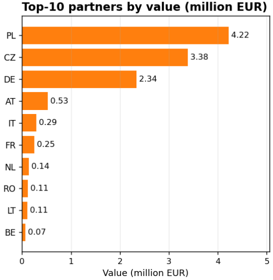
Average price this season (2025/26)	Average price, latest month	Value, latest month	Volume, latest month
3.96 EUR/kg	**3.95 EUR/kg**	**11.45 M EUR**	**2.90 k t**



Dynamics: current season vs previous







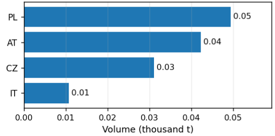
Frozen bilberry exports to the EU

Key indicators (as of May 2026)

Average price this season (2025/26)	Average price, latest month	Value, latest month	Volume, latest month
5.85 EUR/kg	**7.59 EUR/kg**	**1.01 M EUR**	**0.13 k t**

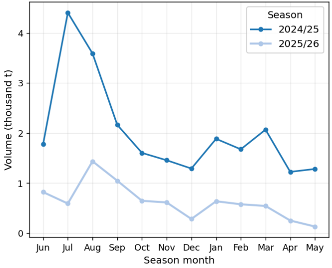
Top partner countries (in May 2026)

Top-10 partners by volume (thousand t)

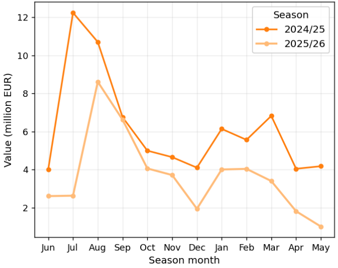


Dynamics: current season vs previous

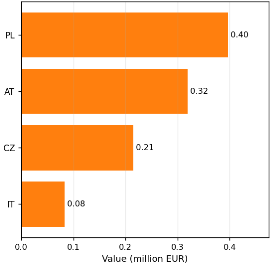
Volume dynamics (thousand t)



Value dynamics (million EUR)



Top-10 partners by value (million EUR)



Other frozen berry exports to the EU (incl. blueberry)

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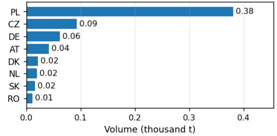
Key indicators (as of May 2026)

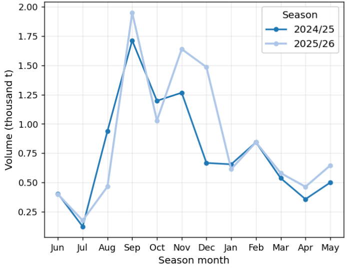
Average price this season (2025/26)	Average price, latest month	Value, latest month	Volume, latest month
1.78 EUR/kg	**1.57 EUR/kg**	**1.01 M EUR**	**0.65 k t**

Top partner countries (in May 2026)
Top-10 partners by volume (thousand t)

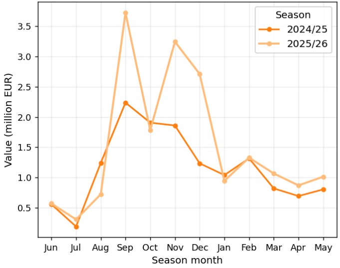


Dynamics: current season vs previous

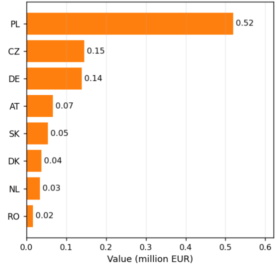
Volume dynamics (thousand t)



Value dynamics (million EUR)



Top-10 partners by value (million EUR)



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Frozen berry exports: key season takeaways

- **Raspberry — record season revenue.** Over June–May of the 2025/26 season, **63.3 k t** was exported (+7% y/y) for **€250.8 million** (+65%) at an average price of **€3.96/kg** (+54%). May stayed expensive: 2.90 k t at **€3.95/kg**. Key destinations — Poland, Czechia, Germany.
- **Bilberry — deep deficit.** Total shipments were only **7.6 k t** against 24.4 k t a year earlier (-69%); the average price of **€5.85/kg** only partly offsets revenue (€44.5 million, -40%). Firmest demand — Poland, Austria, Czechia.
- **Other frozen berries** (including a small share of blueberry) — **10.3 k t** for **€18.3 million** at an average **€1.78/kg**; destinations — Poland, Czechia, Germany.
- **2026/27 context:** the expected raspberry shortfall in Serbia ($-20...-30$%) and Poland's uneven plantations will support high frozen-berry prices — an argument for Ukrainian producers to plan procurement and contracting in advance.

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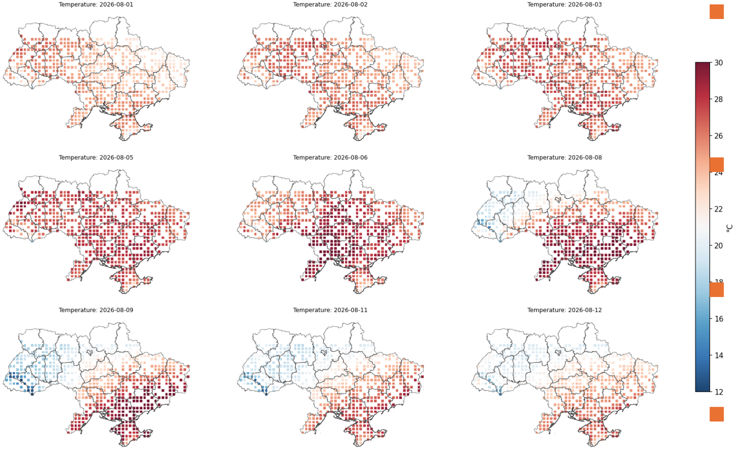
Weather radar for August 2026



- **Overall backdrop:** steady summer warmth — the peak of the main blueberry season, the end of mass raspberry picking and the start of late varieties.
- **Thermal regime:** a typical August heat is forecast; at peak ripening, an increased need for plantation irrigation.
- **Rainfall:** moderate and uneven — a local risk of berry cracking and grey-mould development after downpours.
- **No frost risks** — the regime is steadily summery.

Open-Meteo forecast data; visualisation and analysis by UBA

Regulatory changes and support programmes

Ukraine's national stand (UBA)

at an international fair

Ukraine: Ministry of Agrarian Policy restored

On **17 July 2026** the Cabinet reversed the liquidation of the **Ministry of Agrarian Policy and Food**, restoring it as a standalone body; the merged "Ministry of Economy, Environment and Agriculture" was renamed the "Ministry of Economy and Environment". So agrarian policy — including the administration of sector support programmes (orchard and berry grants, etc.) — again has a dedicated ministry, which may affect how and how fast such support is delivered in coming seasons. A separate state scheme part-reimburses participation in international fairs, but it targets the processing industry and is **unlikely** to apply to berry growers.

EU: ethephon MRL cut for blueberry

From **19 August 2026** the cut of the **ethephon** maximum residue level (MRL) for blueberry to the limit of quantification takes effect (Regulation (EU) 2026/215). Product placed on the market before that date falls under the previous rules. Blueberry exporters should review treatment programmes in good time: an MRL breach at the EU border blocks the shipment. This is already the second consecutive berry MRL cut (after copper and fenarimol) — a signal of systematically tightening EU residue rules.

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Events and initiatives: international trade fairs

Asia Fruit Logistica 2026 — Hong Kong • 2–4 September 2026

Asia's leading marketplace for fresh produce. Exhibitor registration opened early amid soaring demand (bookings ≈**23% higher** y/y, space filling fast). Access to the Asian and Gulf markets for blueberry and frozen-berry exporters.

Fruit Attraction 2026 — Madrid, Spain • 6–8 October 2026

The 18th edition of Europe's leading fruit and vegetable fair (IFEMA Madrid): over **2,400 exhibitors** from 100 countries, ≈117,000 visitors; applications open. Europe's No. 1 venue for fresh-berry contracts.

SIAL Paris 2026 — Paris, France • 17–21 October 2026

The world's leading food-industry fair (Paris Nord Villepinte, biennial): ≈295,000 professionals from ≈200 countries. A key venue for **processed and frozen** berry — access to global retail chains and importers.