Analytical Report — August 2026

UKRAINIAN BERRIES ASSOCIATION

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Swiss Import Promotion Programme

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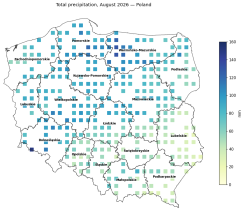
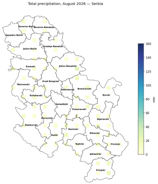
In this report:

- **August weather in Ukraine:** moderate warmth (22.3°C on average) in a **very dry month** — July's 69 mm gave way to only ≈**19 mm**; irrigation demand rose at peak ripening, with no frost risk.
- **Blueberry found its seasonal floor:** at the peak of the domestic harvest the price settled to ≈**135–240 UAH/kg** (≈100 at the farm gate), yet frost-driven crop losses keep growers squeezed between low price and low volume.
- **Raspberry rose:** in the gap between the summer and the autumn (primocane) crops the retail price climbed to ≈**230–270 UAH/kg**.
- **The 2025/26 export season closed at a record:** raspberry — **€250.8 million** (+65% y/y); the new 2026/27 season opened high — in June raspberry shipped at **€4.14/kg** (Eurostat, data through June 2026).
- **Ukraine — among the world's top net frozen-raspberry exporters**; with a smaller crop in Serbia and frost damage in Poland, it may top the market by total volume too in 2026/27.
- **Regulation and events:** state grants for orchards and berries (UAH 440 million), the ethephon MRL for blueberry now in force, September EU quota talks; leading fairs for export contracting.

Climate impact on the season in competitor countries



Poland: August rainfall total — about 74 mm on average

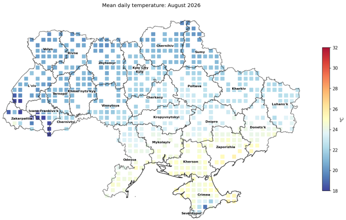


Serbia: only about 7 mm over August (drought)

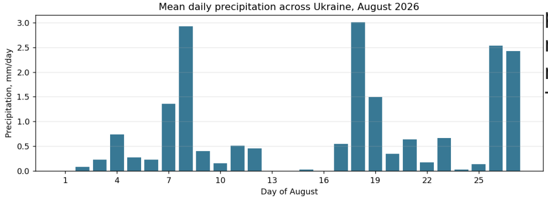
- **Poland** in August — the mass blueberry harvest is winding down. Peak supply is behind: **Bluecrop** is fading, newer varieties (Draper, Calypso) are mid-harvest. Spring frosts hit **Chandler** (about 1.5 instead of ≈5 kg/bush), so purchase prices **rose** — around 15 zloty/kg (≈€3.5) versus a seasonal low of 10 zloty; part of the crop goes into cold storage to sell higher later. Weather was wet (≈74 mm) and moderate.
- **Serbia** — an extremely dry, hot August (≈**7 mm**, 24.5°C) after the driest June on record. The season's crop is ≈**45 k t**; per industry sources the actual export price of frozen raspberry is ≈**€5.5/kg**, the producer (farm-gate) price ≈€3.8/kg. The market stays expensive.

Ukrainian frozen raspberry is price-competitive: per Comext, in June 2026 (latest data) — **€4.14/kg**, below Serbia's export ≈€5.5 and above last year — a good start to the 2026/27 season for exporters.

August weather in Ukraine: temperatures and water supply



Mean daily August temperature by region



Key monthly indicators (ERA5)

22.3°C mean daily (moderate summer warmth)

≈19 mm rainfall this month (very dry, ≈28% of July)

none frost risks

August 2026 was moderately warm (**22.3°C** on average, with no waves of extreme heat) but **unusually dry**: only ≈**19 mm** of rainfall — roughly a third of July's 69 mm. The largest moisture deficit was in the south and east. At the peak of blueberry ripening and the start of the autumn raspberry this **raised irrigation demand**, yet lowered the risk of berry cracking and grey mould, improving shelf-life. There were no frost risks.

Market context: review of Ukrainian and EU industry media

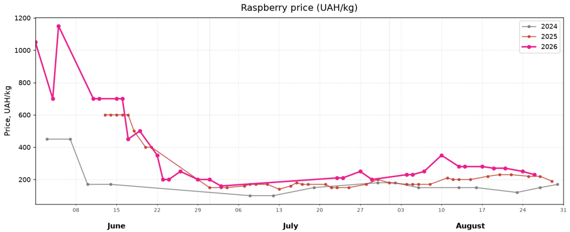
Ukraine

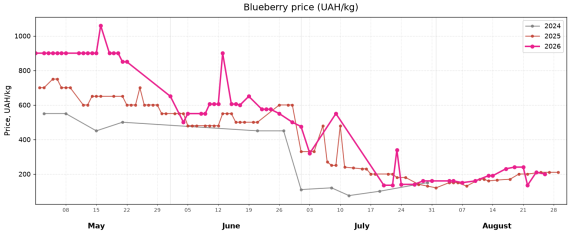
- **Blueberry: the season's paradox.** Despite frost-driven crop losses, at the peak of the domestic harvest the price **fell to a seasonal low**: ≈100 UAH/kg at the farm gate, ≈200 at retail. The Ukrainian blueberry season runs to about the end of August.
- **Raspberry is rising:** in the gap between the summer and autumn (primocane) crops retail climbed to ≈230–270 UAH/kg — the sector's bet on **autumn varieties** strengthens its export position.
- **Structural context (IBO 2026):** Ukraine is #1 in Eastern Europe by blueberry area (6,000 ha), yet its yield is **three times below the world average**.

European Union

- **Raspberry: a tight market.** A smaller crop in Serbia and frost in Poland squeezed EU supply. Our data shows it too: the average export price of Ukrainian frozen raspberry (Comext) rose to **≈€3.96/kg** in season 2025/26 from ≈€2.6 a year earlier ($+52\%$), on a record **63.3 k t**.
- **Poland: blueberry is dearer** amid frost damage to Chandler; purchase prices rose to ≈€3.5/kg; part of the crop moves into cold storage for later sale.
- **Regulatory trend:** from **19 August 2026** the ethephon MRL for blueberry is cut to the limit of determination (EU Regulation 2026/215) — exporters should align spray programmes to avoid consignments being blocked at the border.

Analysis of retail berry prices on the Ukrainian market





Raspberry. After July's seasonal low (≈170–200), the price **rose in August to ≈230–270 UAH/kg** — the gap between the fading summer berry and the arrival of autumn (primocane) varieties. The trend matches rising world prices for frozen raspberry.

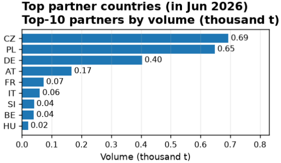
Blueberry. Unlike July (chaotic 135–600), in August the domestic berry **found its seasonal floor**: ≈135–240 UAH/kg (median ≈190), firming to ≈200 by month-end. Notably, the floor came **despite a smaller crop**: over the short harvest peak supply concentrates and imports recede.

Strawberry — outside its main season: residual and greenhouse lots hold at ≈100–180 UAH/kg.

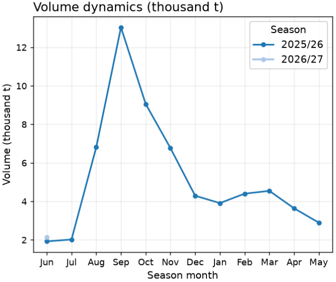
Frozen raspberry exports to the EU

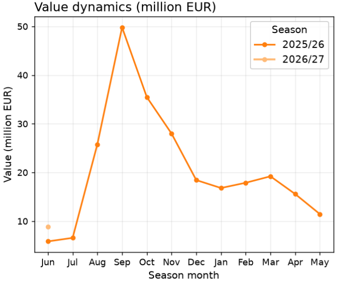
Key indicators (as of Jun 2026)

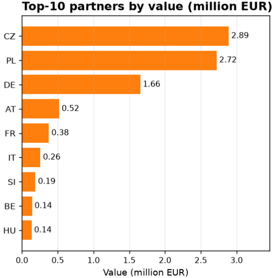
Average price this season (2026/27)	Average price, latest month	Value, latest month	Volume, latest month
4.14 EUR/kg	**4.14 EUR/kg**	**8.89 M EUR**	**2.15 k t**



Dynamics: current season vs previous





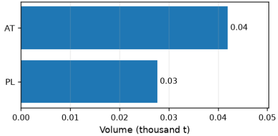


Frozen bilberry exports to the EU

Key indicators (as of Jun 2026)

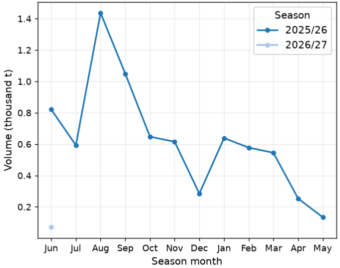
Average price this season (2026/27)	Average price, latest month	Value, latest month	Volume, latest month
7.01 EUR/kg	**7.01 EUR/kg**	**0.49 M EUR**	**0.07 k t**

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

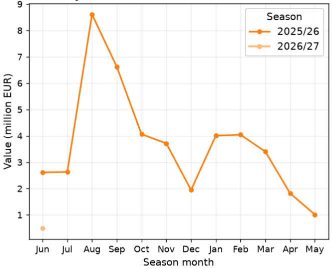


Dynamics: current season vs previous

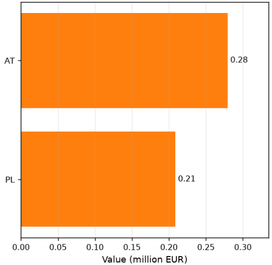
Volume dynamics (thousand t)



Value dynamics (million EUR)



Top-10 partners by value (million EUR)



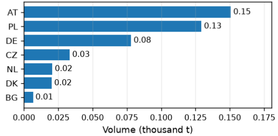
Other frozen berry exports to the EU (incl. blueberry)

Key indicators (as of Jun 2026)

Average price this season (2026/27)	Average price, latest month	Value, latest month	Volume, latest month
1.39 EUR/kg	**1.39 EUR/kg**	**0.61 M EUR**	**0.44 k t**

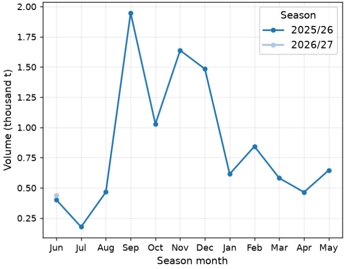
Top partner countries (in Jun 2026)

Top-10 partners by volume (thousand t)

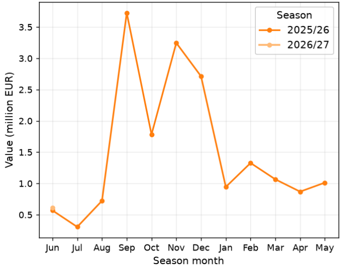


Dynamics: current season vs previous

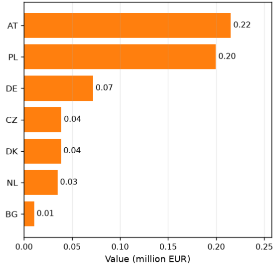
Volume dynamics (thousand t)



Value dynamics (million EUR)



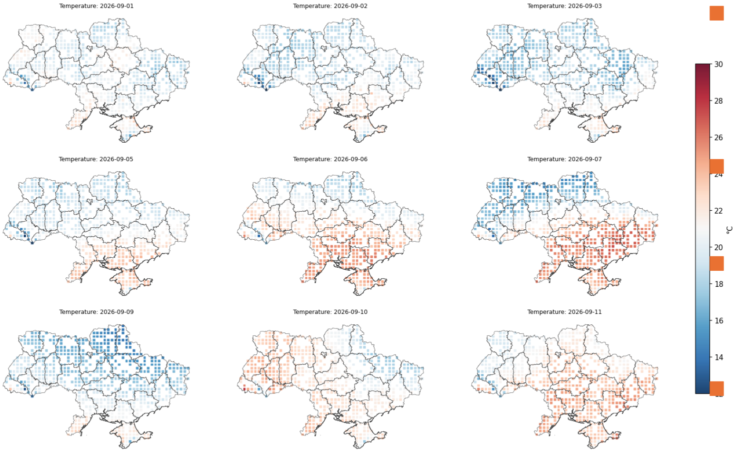
Top-10 partners by value (million EUR)



Frozen berry exports: season summary and a new start

- **Raspberry — the record 2025/26 season is closed.** Over June–May, **63.3 k t** was exported for **€250.8 million** ($+65\%$) at an average €3.96/kg. The new 2026/27 season started high: in **June** — 2.15 k t at **€4.14/kg** (above last season's average). Destinations — Czechia, Poland, Germany.
- **Ukraine — among the world's top net frozen-raspberry exporters** (since 2024, $\approx$65 k t/year). With a smaller crop in Serbia and frost damage in Poland, Ukraine may lead **by total volume too** in 2026/27 — a bet on primocane varieties.
- **Bilberry and other berries.** Season 2025/26: bilberry — 7.6 k t / €44.5 million (a deficit, €5.85/kg); other frozen berries (incl. blueberry) — 10.3 k t / €18.3 million (€1.78/kg). For reference (IBO 2026): Ukraine is **#3 worldwide** in wild bilberry harvest (10.8%), which fell 53% in 2025 due to frosts.
- **Advice to growers:** lower harvests in Serbia and Poland will support high frozen-berry prices — plan procurement and contracting ahead.

Weather radar for September 2026



- **Overall backdrop:** transition to early autumn — the blueberry season ends, the **autumn raspberry** and late varieties are in full swing.
- **Thermal regime:** gradual **cooling** — mean daily ≈18–22°C; still warm by day, markedly cooler at night.
- **Night minima:** in the first ten days of September locally **+3...+6°C** — early cool nights improve colour and flavour of late berries.
- **Rainfall:** mostly **light** — irrigation demand persists; no frost risk for berry crops.

Forecast data from Open-Meteo; visualisation and analysis by UBA

Regulatory changes and support programmes

Ukraine's national stand (UBA)

at an international fair

Ukraine: state support for orchards and berry growing

Through the restored **Ministry of Agrarian Policy**, the state administers grants for planting orchards and berry fields, greenhouses and irrigation (the updated mechanism of Resolution No. 738). The 2026 budget is **UAH 440 million**, of which farmers have already used ≈**UAH 250 million**; applications go through the State Agrarian Register (DAR). For berry growers this is a direct tool to finance new plantings and irrigation — the key yield reserve.

EU: ethephon MRL now in force and September quota talks

From **19 August 2026** the cut of the **ethephon** MRL for blueberry to the limit of determination took effect (EU Regulation 2026/215): an exceedance blocks the consignment at the EU border. Separately, in **September** Ukraine resumes talks with the European Commission on **reviewing tariff quotas** for farm products — a signal of an evolving trade framework worth watching.

UKRAINIAN BERRIES ASSOCIATION

Events and initiatives: international trade fairs

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

Asia's leading fresh-produce marketplace — **opening this week**. A gateway to Asian and Gulf markets for exporters of blueberry and frozen berry; for Ukrainian suppliers, a chance to establish a foothold on high-value destinations.

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

The 18th edition of Europe's leading fresh-produce fair (IFEMA Madrid): over **2,400 exhibitors** from 100 countries. A month to go — time to finalise the stand and meetings with buyers of fresh blueberry, raspberry and strawberry.

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

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