Analytical Report October 2026

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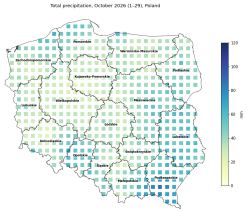
Analytical Report October 2026

In this report:

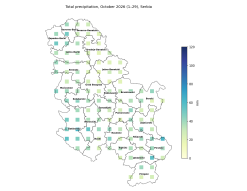
- **October weather in Ukraine: a warm month** (12.2°C — 3.1°C warmer than October 2025); a dry first ten days and rain from mid-month (≈60 mm); night frosts only in the **Carpathian** highlands.
- **Domestic market prices** (points, October 2025 = 100): raspberry and strawberry in October — **104 pts**, almost level with last October; in August–September raspberry was 25–36% more expensive than in 2025.
- **The fresh domestic berry season is ending:** blueberry appears in the price monitoring until 5 October, raspberry until 16 October.
- **Raspberry exports, June–August** (Eurostat, data to August 2026): **17.0 kt** — level with 2024 (−3%) and 58% above 2025; price — **€4.22/kg** (2025: 3.55; +19%). Wild bilberry: August price — €5.53/kg, below last year (5.99).
- **Poland:** GUS revised its raspberry harvest estimate to **59.7 kt (−24.4%)**; in July — 60.9 kt (−23%).
- **Regulation and events:** grants for orchards and berry plantations suspended from 16 October; higher acequinocyl MRL for blueberry from 5 November; UBA collective stand at SIAL Paris; Fi Europe and BIOFACH 2027.

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Climate impact on the season in competing countries



Poland: October precipitation (1–29) — ≈41 mm, 10.2°C

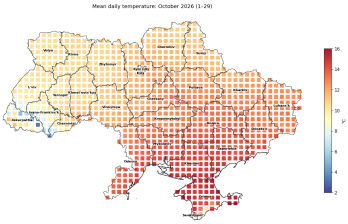


Serbia: ≈34 mm of precipitation, 11.5°C

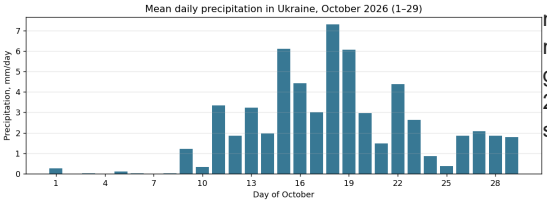
- **Poland.** In its pre-final estimate of 30 September, Statistics Poland (GUS) lowered the raspberry harvest estimate to **59.7 kt (−24.4% vs 2025)**; the preliminary estimate of 31 July was 60.9 kt (−23.0%). GUS noted then that the outcome would depend on autumn varieties and named **reduced acreage** among the causes. Strawberry — 140.2 kt (−6.9%), highbush blueberry — 61.2 kt (−5.4%). Weather factors (per GUS): late-April frosts, rainfall deficit, heat at the end of June.
- **Serbia** — a dry and warm October (≈34 mm, 11.5°C). According to direct information from the Serbian market, the sector is recovering from the crisis of previous seasons; verified October price and volume data are not publicly available.

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October weather in Ukraine: warm, no frost on the plains



Mean daily temperature, October (1–29), by region



Key indicators of the month (ERA5, 1–29)

12.2°C mean daily (+3.1° vs October 2025)

≈60 mm monthly precipitation (1–10 Oct — only 2 mm)

only Carpathians: frost (down to −4.4°C)

October 2026 was **warm**: the mean daily temperature was **12.2°C** against 9.1°C in October 2025 (and 17.2°C in September). The first ten days were **almost dry** (≈2 mm); regular rain followed from 11 October — ≈60 mm for the month in total (October 2025: ≈68 mm). Night frosts were recorded **only in the Carpathian highlands**: 19 of 929 grid points, down to −4.4°C on the nights of 12–14 and 23–27 October. Elsewhere, minimum night temperatures stayed above zero.

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Market context: Ukraine and the EU

Ukraine

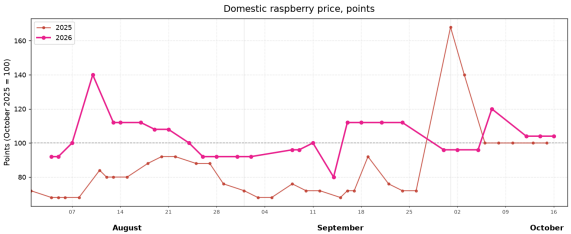
- **New EU export data — August 2026** (Eurostat publishes with a lag of ≈2 months): raspberry — **9.64 kt** worth €41.85 M (August 2025: 6.81 kt), wild bilberry — **3.21 kt** worth €17.73 M (1.44), other berries — 0.84 kt (0.47). Details — pp. 7–10.
- **End of the fresh berry season.** In the market price monitoring, domestic blueberry appears until 5 October, raspberry until 16 October and strawberry until 23 October.
- **State support.** Grant applications for orchards and berry plantations suspended since 16 October; resumption in Q1 2027 (p. 12).

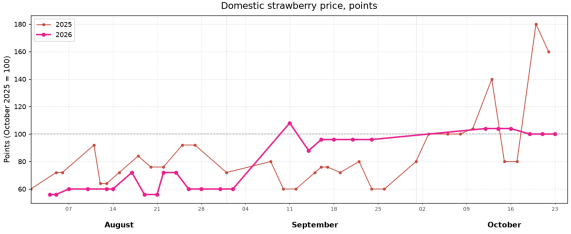
European Union

- **Poland is the main buyer.** In August it took **5.52 kt** (57%) of Ukraine's frozen raspberry exports to the EU, followed by Germany (1.58) and Czechia (1.28) (Eurostat).
- **Price in the EU (Eurostat).** Frozen raspberry in August — **€4.34/kg** (August 2025: 3.79), wild bilberry — **€5.53/kg** (5.99): cheaper than a year ago despite larger volumes.
- **Pesticide residue limits.** From 5 November a higher acequinocyl MRL applies to blueberry (Regulation (EU) 2026/2289); the raspberry level is unchanged (details — p. 12).

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Prices of domestic berries on the Ukrainian market, points





Prices are shown **in points** (October 2025 = 100; median for the same days of October): sample monitoring of a single market is suitable for assessing dynamics, not price levels.

Raspberry: August — 100 pts (2025: 80), September — 98 (72), October — **104** (100). In August–September the price was 25–36% above last year; in October the gap narrowed to 4%. Domestic raspberry appears in the monitoring until 16 October.

Strawberry: August — 60 pts (2025: 74), September — 96 (72), October — **104** (100): cheaper than last year in summer, more expensive in autumn.

Blueberry: domestic berries appear in the monitoring only until 5 October, so no October comparison is given.

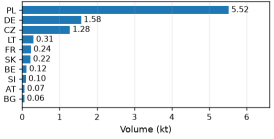
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Frozen raspberry exports to the EU

Key indicators (as of Aug 2026)

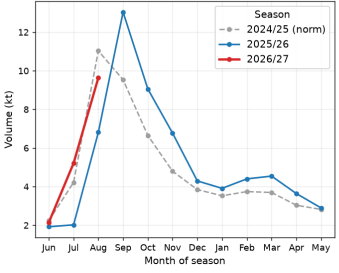
Average price, season 2026/27 (Jun–Aug 2025: €3.55/kg)	Price, latest month (Aug 2025: €3.79/kg)	Value, latest month	Volume, latest month
€4.22/kg	**€4.34/kg**	**€41.85 M**	**9.64 kt**

Top partner countries (Aug 2026)
Top-10 partners by volume (kt)

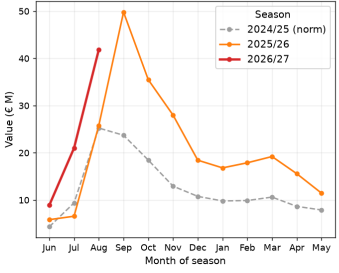


Dynamics: current season, previous season and 2024/25 norm

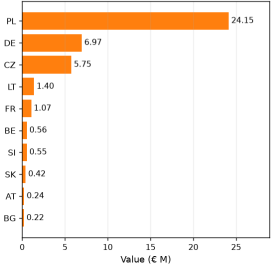
Volume dynamics (kt)



Value dynamics (€ M)



Top-10 partners by value (€ M)



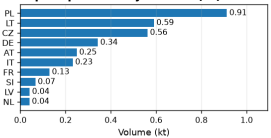
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Frozen bilberry exports to the EU

Key indicators (as of Aug 2026)

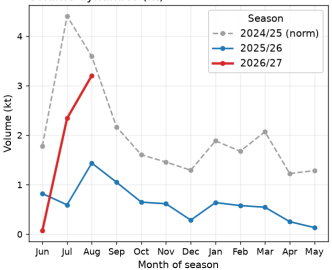
Average price, season 2026/27 (Jun–Aug 2025: €4.86/kg)	Price, latest month (Aug 2025: €5.99/kg)	Value, latest month	Volume, latest month
€5.65/kg	**€5.53/kg**	**€17.73 M**	**3.21 kt**

Top partner countries (Aug 2026)
Top-10 partners by volume (kt)

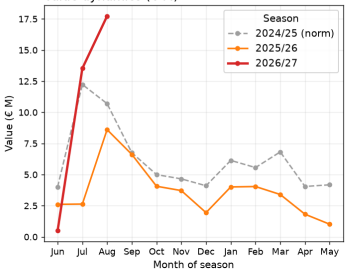


Dynamics: current season, previous season and 2024/25 norm

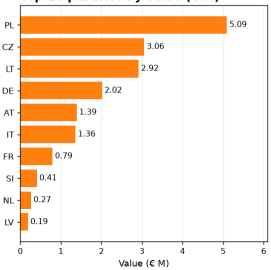
Volume dynamics (kt)



Value dynamics (€ M)



Top-10 partners by value (€ M)



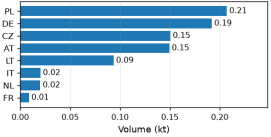
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Exports of other frozen berries to the EU (including blueberry)

Key indicators (as of Aug 2026)

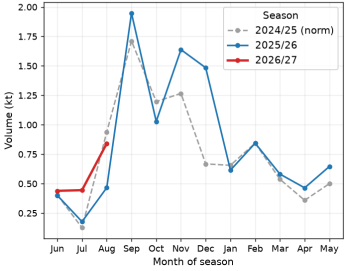
Average price, season 2026/27 (Jun–Aug 2025: €1.53/kg)	Price, latest month (Aug 2025: €1.55/kg)	Value, latest month	Volume, latest month
€1.65/kg	**€1.86/kg**	**€1.56 M**	**0.84 kt**

Top partner countries (Aug 2026)
Top-10 partners by volume (kt)

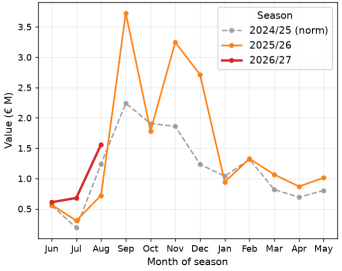


Dynamics: current season, previous season and 2024/25 norm

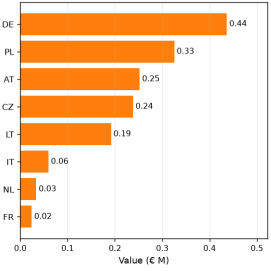
Volume dynamics (kt)



Value dynamics (€ M)



Top-10 partners by value (€ M)



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Exports: raspberry volumes at 2024 level, price +19% vs 2025

- **Raspberry, June–August 2026: 17.0 kt** worth €71.7 M. Volume is level with 2024 (17.5 kt, −3%) and 58% above 2025 (10.8 kt); August alone (9.64 kt) was below August 2024 (11.0 kt). **Average price**, June–August: 2026 — **€4.22/kg**, 2025 — 3.55, 2024 — 2.23; August 2026 — 4.34 (2025: 3.79).

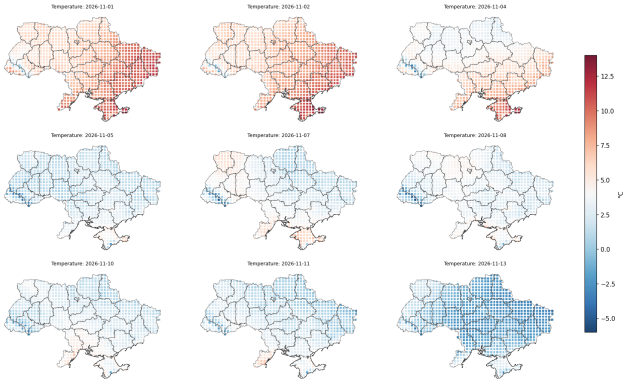
- **Destinations:** in August Poland — 5.52 kt (57%), Germany — 1.58, Czechia — 1.28; prices of deliveries to the three main buyers — €4.37–4.50/kg (August 2025: 3.72–4.01).

- **Wild bilberry:** 5.6 kt worth €31.7 M — twice the 2025 volume (2.85 kt), but only 57% of 2024 (9.77 kt). Season price — €5.65/kg (2025: 4.86), **August — €5.53/kg (2025: 5.99)**. Other frozen berries (including blueberry) — 1.7 kt, €1.65/kg (2025: 1.53).

- **Assessment:** three months are the start of the season, not its result: last season the largest volumes came in September–October. The raspberry price is only moderately above last year (+19%); for wild bilberry the August price is already below last year. It is too early to extrapolate these figures to the whole season.

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Weather radar for November 2026



Open-Meteo forecast data, visualisation and analysis by UBA

(forecast for 1–14 November; accuracy declines beyond 7 days)

- **General picture:** transition to winter.
- **Temperature:** warm until 4 November (+7°C), then a **sharp cooling** to ≈2–4°C; around 0°C on 12–13 November.
- **Night minima:** from 5 November **frost across most of the country**, locally down to −7…−8°C.
- **Precipitation:** almost none (0–2 mm/day).

Ukraine: grant applications for orchards and berry plantations temporarily suspended



Banner: Ministry of Agrarian Policy and Food of Ukraine

According to the Ministry of Economy's notice of 6 October, acceptance of grant applications for horticulture, berry growing, viticulture and greenhouses was **suspended from 16 October 2026** (Cabinet of Ministers Resolution No. 738); the last day to apply was 15 October. **Resumption — Q1 2027**, with funding provided in the 2027 budget. In 2026, 61 grant orders worth UAH 300 M were issued, of which 40 worth UAH 170 M cover orchards, berry plantations and vineyards combined (no separate figure for berries); the projects include 428.4 ha of new plantings.

EU: higher acequinocyl MRL for blueberry (Regulation 2026/2289)

Commission Regulation (EU) 2026/2289 of 15 October (Official Journal of the EU, 16 October; **enters into force on 5 November 2026**) raises the MRL of the acaricide **acequinocyl** for blueberries, cranberries, currants and gooseberries from the limit of determination of 0.01 to **2 mg/kg**, following an application by the producer of the substance and an EFSA opinion. **The raspberry MRL is unchanged** (0.01 mg/kg). Use in Ukraine is possible only if the product is listed in the State Register of Pesticides and Agrochemicals.

Events and initiatives: international trade fairs



SIAL Paris 2026: UBA stand • 17–21 Oct (held)

10 Ukrainian companies exhibited at the Frozen Food stand organised by UBA; over 5 days they held around **1,000 meetings** with potential partners. According to one exhibitor, buyers discussed prices, the harvest and the situation in Ukraine.



Fi Europe 2026 — Frankfurt • 17–19 November 2026

A B2B mission for organic producers and processors, including berries: the NGO Organic Initiative, supported by SIPPO, matches buyers and schedules meetings in advance. Participation fee — up to €300; travel and accommodation are paid separately.



BIOFACH 2027 — Nuremberg • 16–19 February 2027

Call for the National Pavilion of Ukraine (NGO Organic Initiative, under the patronage of the Ministry of Agrarian Policy, supported by SIPPO and GQSP/UNIDO). Preferential terms for berry and nut producers (limited places); a valid organic certificate is required. **Application deadline — 1 November 2026.**