



## Information and Analytical Bulletin

30.12.2025

### Ukraine:

- Raspberry exports at the start of the season halved, with fresh supplies being almost negligible.
- Strawberries met demand only in June; imports increased by 1.5 times.
- Frozen currant exports declined nearly fivefold.
- Fresh blueberries remained relatively stable, while frozen bilberries saw a significant decline.

hereinafter the name «blueberries» for *Vaccinium corymbosum*  
and the name «bilberry» for *Vaccinium myrtillus*

### Poland:

- Purchases of Ukrainian raspberries increased to the level of 2022.
- Blueberries: a gradual substitution of Ukrainian supplies with Canadian product.
- Ukrainian raspberries are filling the supply gap and are often re-exported.
- Blueberry imports in July were weak due to lower volumes from Ukraine.

### Germany:

- Reduced shipments from Ukraine pushed raspberry prices higher.
- Serbia did not offset the supply deficit, leaving the market constrained.
- Bilberries : the gap left by Ukraine was not filled by either Morocco or Peru.
- The market shows high sensitivity to Ukraine's seasonal fluctuations.

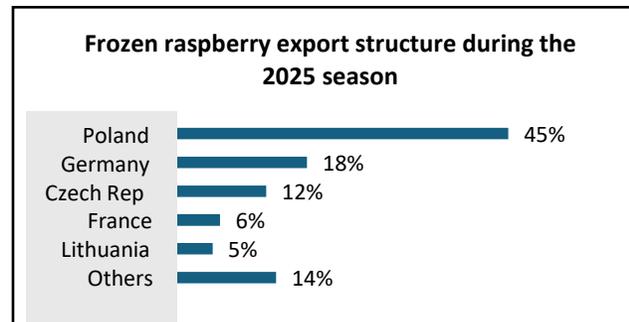
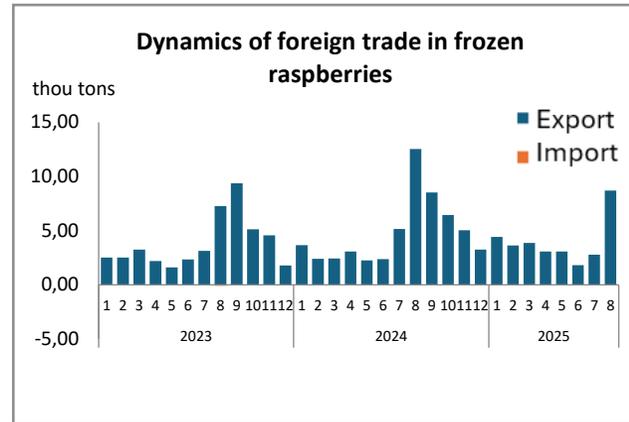
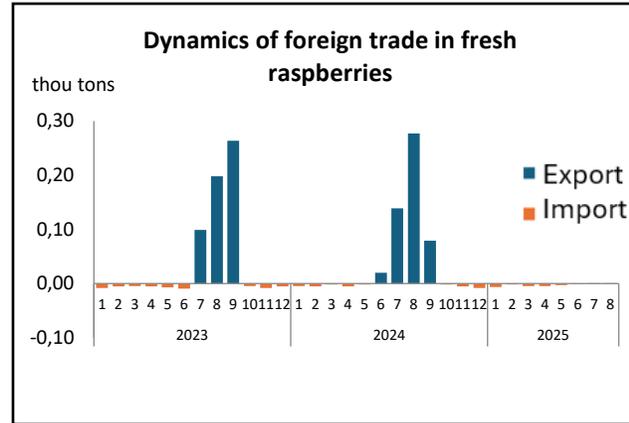


## Ukraine

is one of the leading exporters of fresh and frozen berries in Europe. Changes in domestic production and fluctuations in yields have a direct impact on external markets and therefore require systematic analysis to understand future trends.

The year 2025 was marked by significant shifts in Ukraine’s berry trade. The key driver was adverse weather conditions throughout the season. In particular, three waves of spring frosts negatively affected crop formation, especially in the open-field segment. Additional pressure came from heavy rains and hail during the summer, which resulted in partial crop losses and a deterioration in quality in certain regions. As a result, supply declined, harvesting timelines shifted, and yield recovery remained uneven, directly affecting both the volumes and the structure of trade flows.

This report analyzes the dynamics of Ukraine’s berry imports and exports in 2025, with a focus on actual changes in trade volumes and destinations. A separate section is dedicated to the foreign trade of Ukraine’s key trading partners — Poland and Germany — which generate the main demand for Ukrainian produce and significantly shape overall market conditions.



## Raspberries

are Ukraine’s primary export-oriented berry and largely determine the dynamics of the entire berry sector. In 2025, total production volumes declined due to a poor harvest, which directly affected the structure of sales.

In previous years, **fresh raspberries** were predominantly exported for further processing. However, in 2025, reduced yields meant that domestic processing capacities were sufficient to absorb the available supply, leaving no surplus for export.

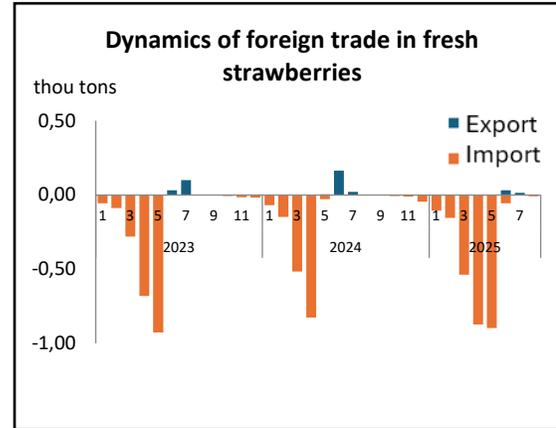
The **frozen raspberry** segment, which constitutes the core of export revenues, is showing a significant lag behind last year’s performance. Between July and September 2025, only 17.2 thousand tons were exported, 30% less than in the same period of 2024. If the current trend persists, total export volumes by May 2026 are also expected to remain lower. The demand structure is likely to stay relatively stable, with Poland accounting for 45% of shipments and Germany for 18%.



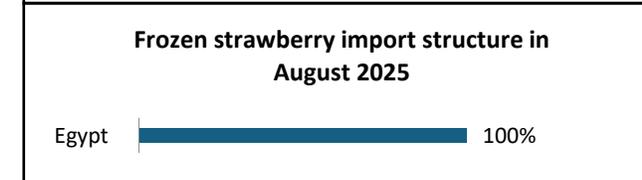
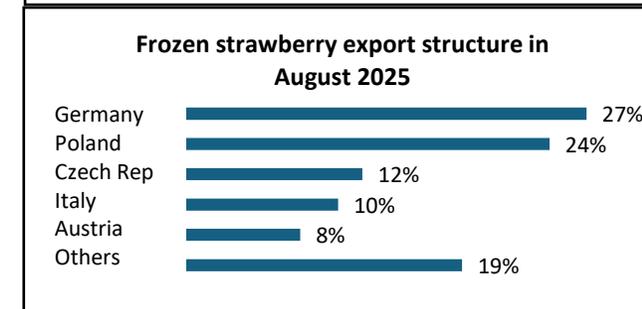
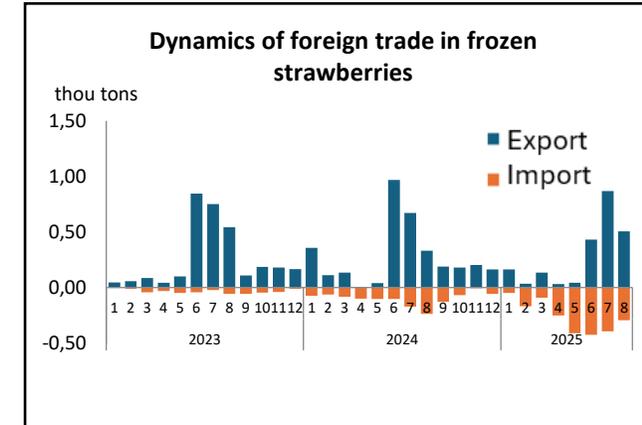
# Strawberries

continue to exhibit a strong dependence on imports in both the fresh and frozen segments, driven by a combination of seasonal factors and the competitiveness profile of Ukrainian production.

During the off-season from December through May, Egypt remains the key supplier of **fresh strawberries** to the Ukrainian market. Domestic production is absent during this period, so imports fully cover demand. In the 2025 season, the situation was further complicated by a weak start to the Ukrainian harvest, which was partially offset by supplies from other countries, particularly Greece. At the same time, the overall market pattern remained unchanged: once the Ukrainian season begins, fresh strawberry imports traditionally decline.



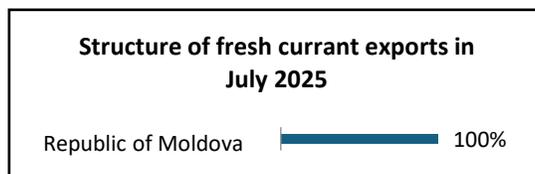
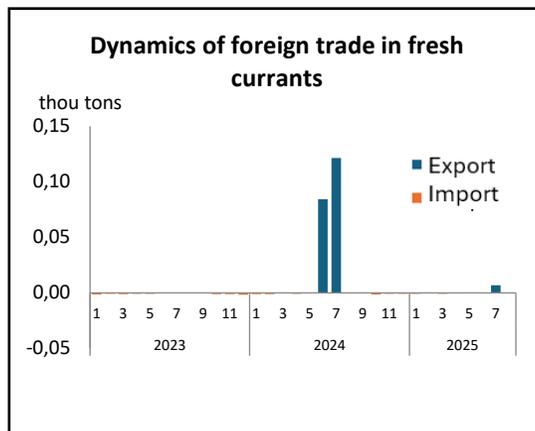
For **frozen strawberries**, the dynamics are different. Imports are more uniform throughout the year, after which Ukrainian frozen products remain uncompetitive in price for processors. This led to the formation of a smooth but steady trend of growth in imports from Egypt, which further intensified against the backdrop of the unsuccessful 2025 season and actually continued the existing trend. At the same time, Ukrainian frozen strawberries are still present on foreign markets and are exported mainly to EU countries, in particular to Germany and Poland. However, Ukraine is not a key player in this segment and occupies a supporting niche.



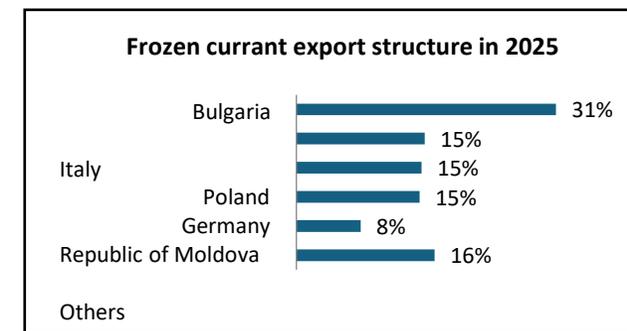
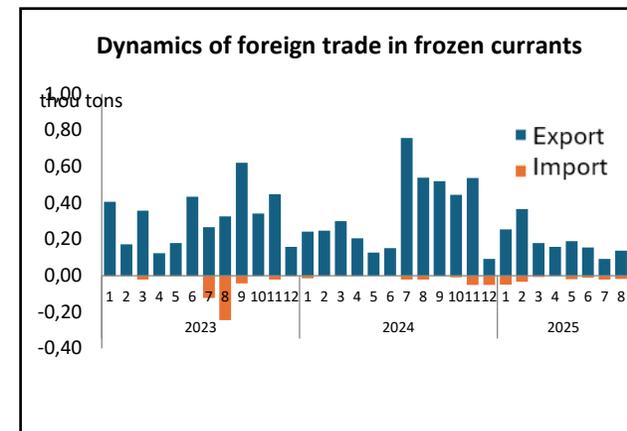


## Currants

have traditionally not been a strongly export-oriented berry for Ukraine; therefore, export volumes are determined on a residual basis, depending on the harvest size and the availability of surplus production. In 2025, unfavorable weather conditions led to a decline in output, which directly affected export volumes in both the fresh and frozen segments. In the **fresh currant** segment, this was reflected in reduced exports, primarily to Poland — traditionally the main destination market for Ukrainian currants. At the same time, exports to Moldova remained economically viable, allowing shipments to be maintained and even record a slight increase.



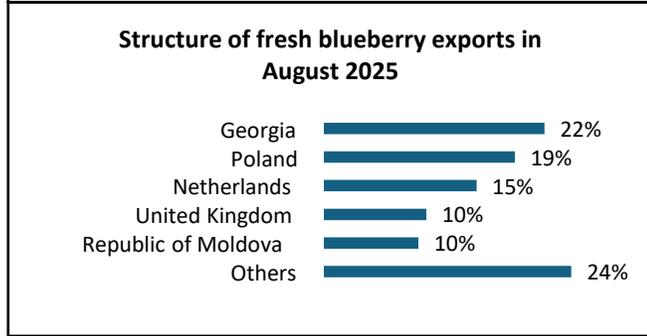
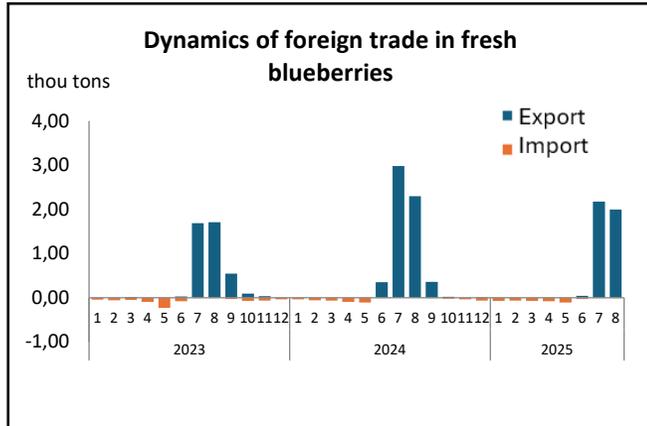
The **frozen currant** segment also remains relatively small in scale. In 2025, only a limited share of production was exported (five times less than in the same period of 2024, although the difference in absolute terms was not substantial) while the majority remained on the domestic market. The main export destinations for frozen currants continue to be Bulgaria, Italy, Poland, and Germany, which together form the core of external demand for this product. At the same time, imports of frozen currants remain minimal and mainly serve to fill temporary supply gaps in Ukrainian shipments, primarily through Poland.





# Blueberries and Bilberries

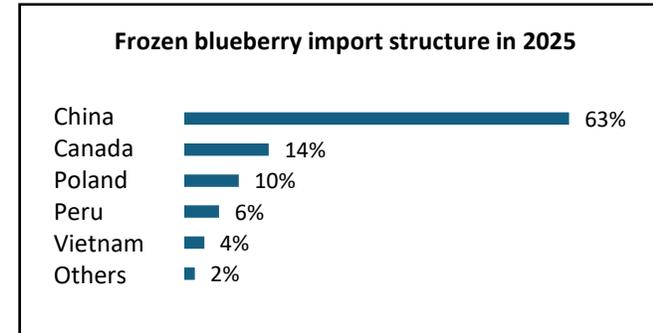
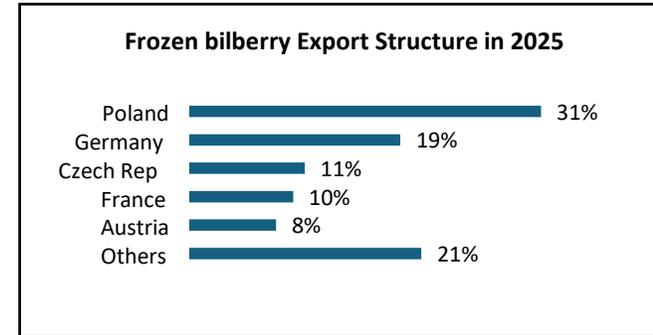
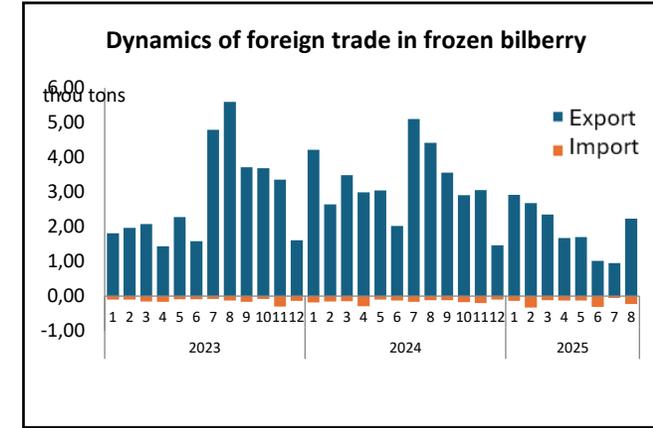
Exports of **fresh blueberries** in 2025 were affected to a lesser extent compared to other berry crops. The early-season segment suffered the most, while the bulk of the harvest — despite declining relative to 2024 — still exceeded 2023 volumes. The main export destinations for fresh blueberries remain Georgia, Poland, and the Netherlands. The Netherlands primarily serves as a trading hub for further re-export to other markets.



The **frozen bilberry and blueberry** segment was affected much more severely. At the beginning of the season, volumes dropped sharply — to roughly half of the level recorded in the same period of the previous year. This trend is critical, as the start of the season typically accounts for the bulk of frozen production, thereby having a long-term impact on annual export performance.

In response to the raw material shortage, producers adopted a strategy of distributing available volumes more evenly throughout the year. This approach helps maintain export channels and partially offset losses through higher prices. The main export destinations for frozen blueberries remain Poland and Germany.

Blueberry imports into Ukraine in 2025 remain limited and niche in nature. Supplies consist mainly of specialized varieties from China, Canada, and Poland, without exerting a significant impact on the overall market balance

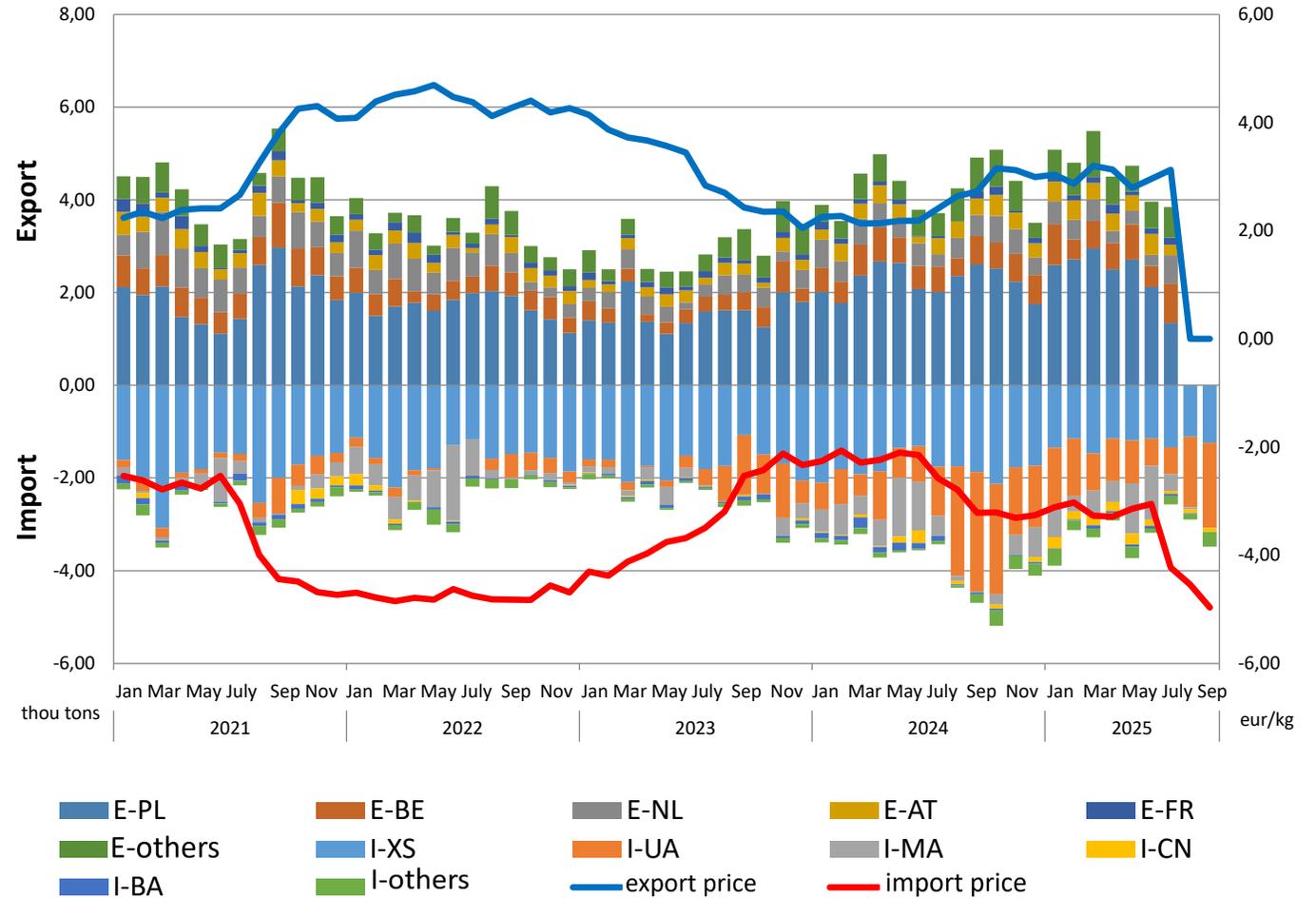




## Germany – Frozen Raspberries

Historically, the key exporters of raspberries to the German market have been Serbia and Morocco. However, in recent years, Ukraine's presence has increased markedly, significantly influencing price dynamics. Owing to the lower production costs of Ukrainian supplies, the average import price of raspberries in 2023–2024 declined by nearly half. In 2025, the market situation shifted amid reduced harvests in several major producing countries, including Ukraine, Poland, and Serbia. The contraction in supply was systemic in nature and led to a deficit on the European raspberry market. Under these conditions, prices in Germany — one of the largest berry importers in the EU — began to rise back to 2022 levels. This trend reflects the high sensitivity of the European raspberry market to simultaneous production changes in the three main suppliers and the lack of alternative sources of supply, which, in a deficit environment, supports premium pricing for the remaining available volumes.

Foreign trade and price dynamics in Germany  
Frozen raspberries





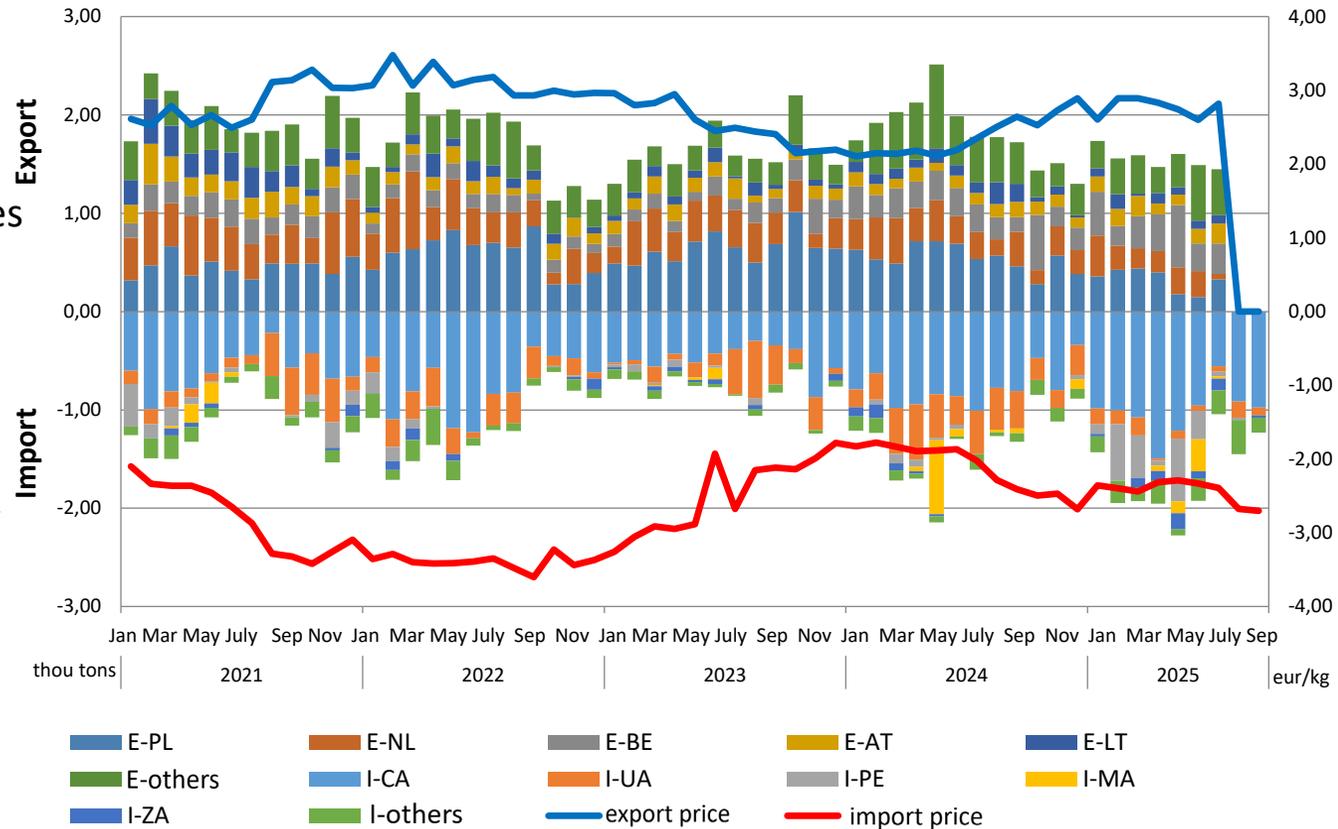
## Germany – Frozen Bilberries and Blueberries

Germany’s blueberry import balance throughout the year is shaped by the seasonality of different suppliers and remains highly uneven. Canada continues to be the key partner, providing relatively stable shipments year-round, and the dynamics of Canadian exports largely determine overall market conditions. Alongside Canada, seasonal suppliers — Peru, Morocco, and Ukraine — are also present, with volumes fluctuating depending on the time of year.

In previous years, Ukraine played a notable role in the summer segment; however, its shipments were uneven and did not ensure a stable year-round presence. In 2025, due to a significant decline in the harvest, Ukrainian blueberry exports to Germany fell to minimal levels. Between February and June, shipments from Peru increased, followed by Morocco in June, while Canadian volumes showed a slight rise.

This diversification helped the market avoid sharp price fluctuations in 2025. At the same time, declining volumes from certain seasonal suppliers create uncertainty regarding market balance at the beginning of 2026, potentially increasing price pressure if supply continues to tighten.

### Foreign trade and price dynamics in Germany Frozen blueberries and bilberries



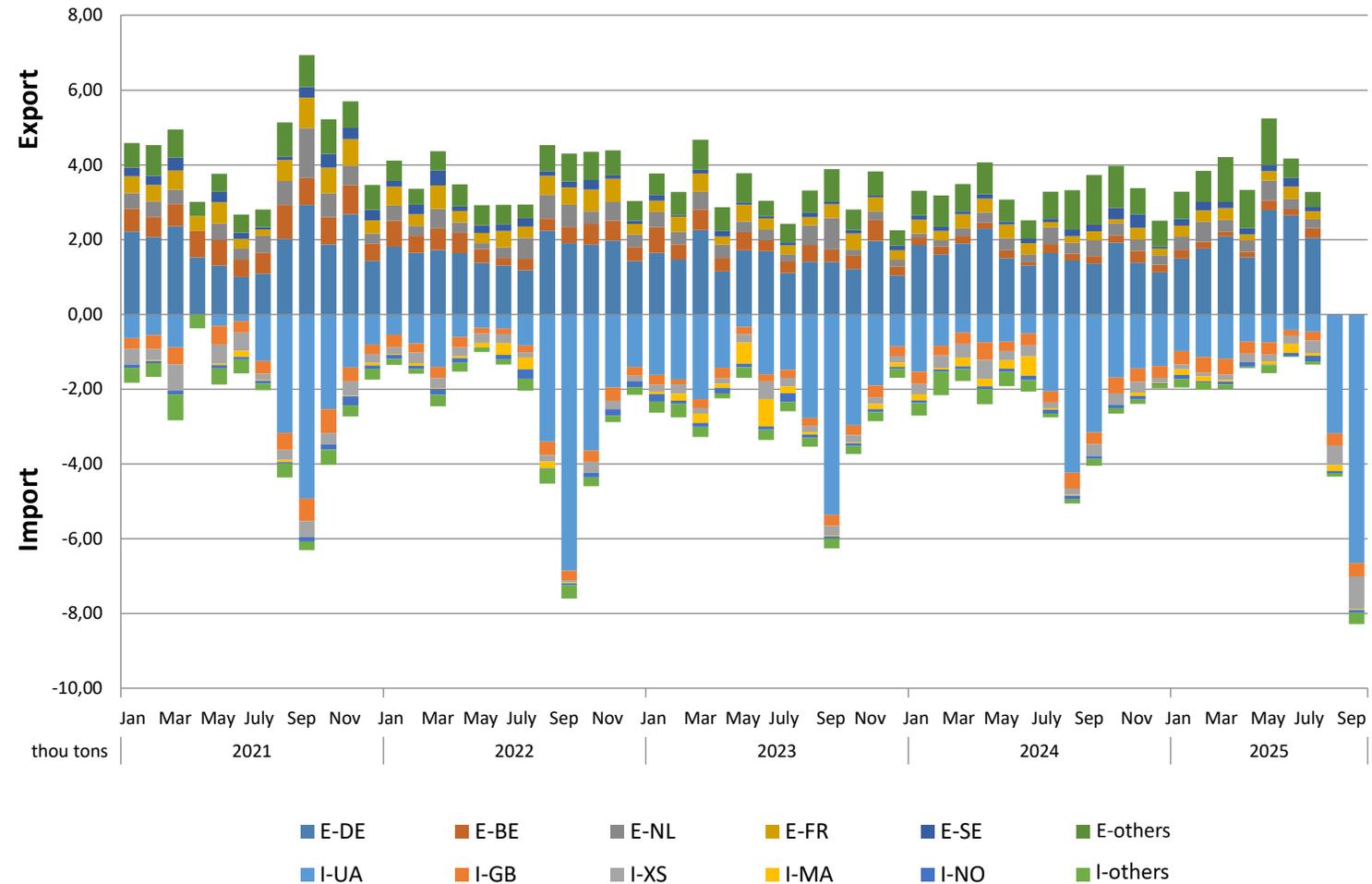


## Poland – Frozen Raspberries

Poland has traditionally been Ukraine’s main trading partner in the raspberry segment, and 2025 confirmed this trend. Despite an overall decline in export shipments to most countries, deliveries to Poland not only remained stable but even increased, reaching the record levels observed in 2022.

The primary reason for this growth lies in the lower quality requirements compared to other European markets. Part of the raspberry crop affected by frost, which did not meet Western European standards, could still be supplied to the Polish market. This enabled Ukrainian producers to market volumes that were unsuitable for other export destinations. Ukraine faces virtually no direct competition in the Polish frozen raspberry market. At the same time, it is important to emphasize that, contrary to the common perception among Polish farmers, Ukrainian berries do not displace local production. Instead, they mainly fill supply gaps during peak processing periods, and a significant share of raspberries imported from Ukraine is subsequently re-exported to other EU countries.

## Dynamics of Foreign Trade in Poland Frozen Raspberries





## Poland – Blueberries

An adverse trend for Ukraine in the Polish blueberry market began to take shape in 2024 and continued into 2025. Poland has been gradually substituting Ukrainian berries with Canadian supplies, which now account for nearly half of total imports while overall procurement volumes have remained broadly unchanged. Traditionally, the peak month of July did not show heightened activity this season, as Canada occupied part of the market niche previously covered by Ukraine.

The main drivers of this shift are clear: stable and predictable shipments from Canada, as well as reduced supply from Ukraine due to spring frosts that disrupted production cycles and limited available export volumes. As a result, Canadian blueberries have become a more reliable import source for Poland, while Ukrainian products have lost part of their market share.

### Dynamics of Foreign Trade in Poland Frozen Blueberries

