

Analytical Report — September 2026



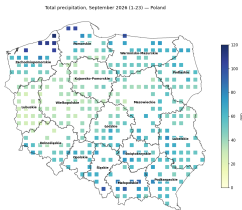
UKRAINIAN
BERRIES
ASSOCIATION

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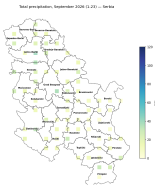


In this report:

- **September weather in Ukraine: cooling** (17.2°C on average vs 22.3 in August) in a **wet month** (≈52 mm vs 19 mm in August); **first autumn frosts** in some northern and western districts late in the month.
- **Blueberry: the domestic season is ending.** As supply fades, retail **rose to** ≈**210–280 UAH/kg** (median ≈250) — above August's floor and above last September.
- **Raspberry: the autumn (primocane) peak.** Retail ≈200–280 UAH/kg; processors pay a record ≈**195 UAH/kg** in a tight market.
- **A confident start to the 2026/27 export season:** over June–July raspberry — **7.4 k t for €29.9 million** (€4.06/kg), and **5.2 k t** in July alone (Eurostat, data through July 2026) — in line with the 2024 norm and well above the weak 2025 start.
- **Ukraine — among the world's top net frozen-raspberry exporters;** with Poland's raspberry crop failure it may top the market by total volume too. July's leading destination — Poland.
- **Regulation and events:** state support for orchards and berries, the start of EU tariff-quota talks; the leading October fairs — Fruit Attraction and SIAL Paris.



Poland: September rainfall (1–23) — about 52 mm on average

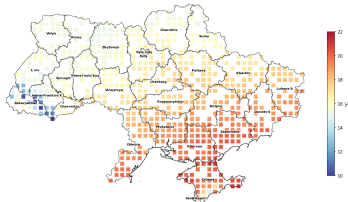


Serbia: ≈ 15 mm of rainfall over September

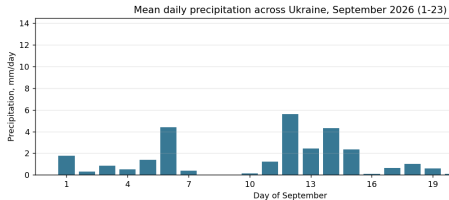
- **Poland** — the blueberry season is closing and, above all, the **raspberry crop has fallen sharply** (spring frosts plus a poor summer). As a result, Polish processors **actively import Ukrainian berry** — in July Poland became the **leading destination** for frozen raspberry from Ukraine (2.83 k t).
- **Serbia** — a dry September (≈ 15 mm, see map). Per direct information from the Serbian market, the industry is **recovering** from the crisis of recent seasons and regaining its competitive form — i.e. the supply of the EU's largest raspberry exporter is gradually returning to the market.



Mean daily temperature: September 2026 (1-23)



Mean daily September temperature (1–23) by region



Key monthly indicators (ERA5, 1–23)

17.2°C

mean daily

(cooling, -5° vs
August)

≈52 mm

rainfall this month

(wet, $\approx 2.7 \times$ August)

first

frosts

(to -2°C late month)

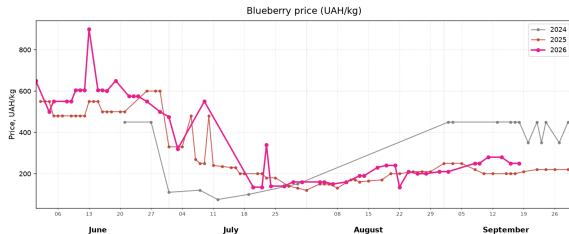
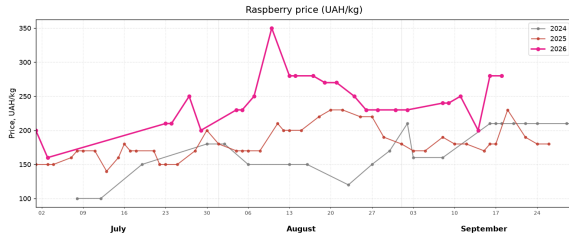
September 2026 brought the **transition to early autumn**: the mean daily temperature fell to **17.2°C** (from 22.3 in August), and the month was **wet** — ≈ 52 mm of rainfall versus a dry 19 mm in August, which relieved the moisture-deficit stress. Late in the month (nights of 21–23 September) some **northern and western** districts recorded the **first autumn frosts** (down to -2°C at the coldest points). Cool nights improve the colour and flavour of late berries, but for unharvested primocane raspberry and strawberry in low-lying spots this is a damage risk.

Ukraine

- **Raspberry: the season's price peak.** A deficit pushed purchase prices close to **200 UAH/kg** (processors pay $\approx 193\text{--}195$ excl. VAT — the highest on record); retail — $\approx 230\text{--}280$. The sector's bet on **primocane varieties** strengthens its export position.
- **Blueberry: the season is ending.** Domestic supply fades and retail **rose to ≈ 250 UAH/kg** versus August's floor of ≈ 200 .
- **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.** Poland's raspberry crop failure squeezed supply. Ukrainian exports started confidently: in our data (Comext) season 2026/27 opened with **7.4 k t** over June–July at **€4.06/kg** — in line with the 2024 norm.
- **Poland: a raspberry crop failure** drives processors to import — in July Poland was the #1 destination for Ukrainian berry (2.83 k t); Chandler blueberry was also hit by frost.
- **Regulatory trend:** the reduced ethephon MRL for blueberry is in force (since 19 August 2026, EU Regulation 2026/215); in September Ukraine **opened talks** with the EC on reviewing tariff quotas.



Raspberry. The autumn (primocane) peak: retail holds at **≈200–280 UAH/kg** (up to 280 by mid-September) — well above last September (≈180). Processors pay a record ≈195 UAH/kg. The trend matches rising world prices for frozen raspberry.

Blueberry. As the domestic season ends the price **rose to ≈210–280 UAH/kg** (median ≈250) versus August's floor of ≈200 — supply fades and only late and cold-stored lots remain. That is above last September (≈220).

Strawberry — autumn primocane lots: ≈120–270 UAH/kg (median ≈200), markedly dearer than the summer season.



Key indicators (as of Jul 2026)

Average price this season (2026/27)

Average price, latest month

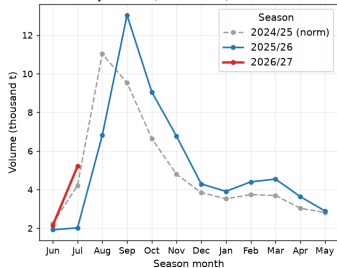
Value, latest month

Volume, latest month

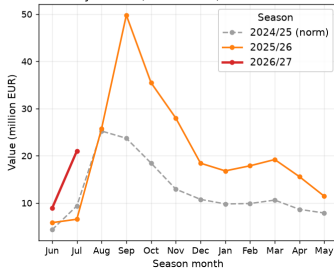
4.06 EUR/kg **4.03 EUR/kg** **21.00 M EUR** **5.21 k t**

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

Volume dynamics (thousand t)

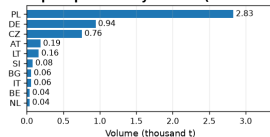


Value dynamics (million EUR)

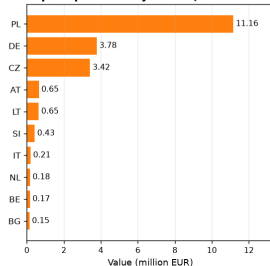


Top partner countries (in Jul 2026)

Top-10 partners by volume (thousand t)



Top-10 partners by value (million EUR)





Key indicators (as of Jul 2026)

Average price this season (2026/27)

5.78 EUR/kg

Average price, latest month

Value, latest month

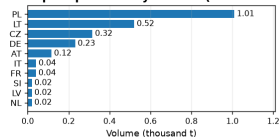
13.53 M EUR

Volume, latest month

2.34 k t

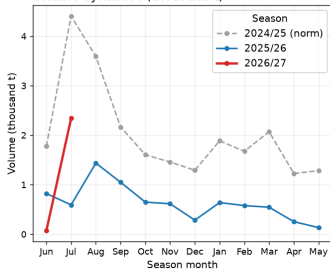
5.82 EUR/kg

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

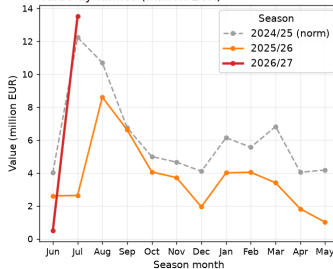


Dynamics: current season, previous, and the 2024/25 norm

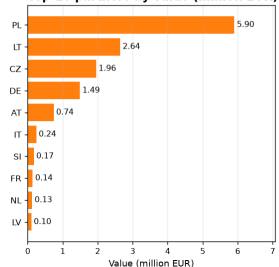
Volume dynamics (thousand t)



Value dynamics (million EUR)



Top-10 partners by value (million EUR)



Key indicators (as of Jul 2026)

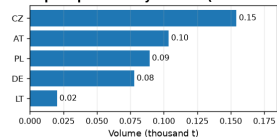
Average price this season (2026/27) / average price, latest month

Value, latest month

Volume, latest month

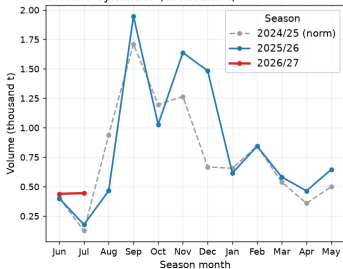
1.46 EUR/kg **1.53 EUR/kg** **0.68 M EUR** **0.44 k t**

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

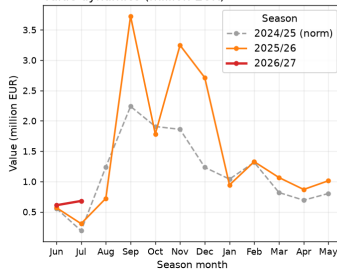


Dynamics: current season, previous, and the 2024/25 norm

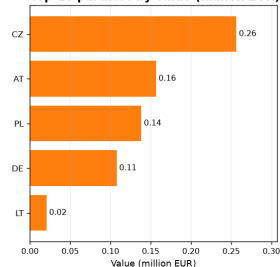
Volume dynamics (thousand t)



Value dynamics (million EUR)

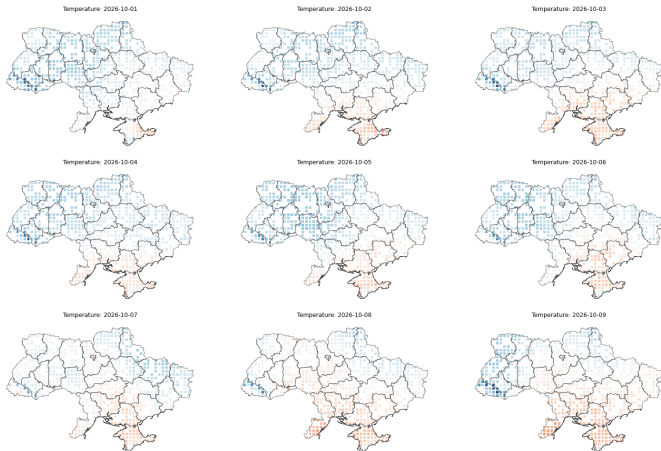


Top-10 partners by value (million EUR)





- **Raspberry — a confident start to the 2026/27 season.** Over June–July 2026, **7.4 k t** was exported for **€29.9 million** at an average **€4.06/kg**; July alone — 5.2 k t at €4.03/kg. That is **in line with the 2024 norm** and well above the weak 2025 start — the main seasonal peak is still ahead. Leading destinations — **Poland**, Germany, Czechia.
- **Ukraine — among the world's top net frozen-raspberry exporters** (≈ 65 k t/year). With Poland's raspberry crop failure, Ukraine has a real chance to lead **by total volume too** in 2026/27 — a bet on primocane varieties.
- **Bilberry and other berries.** Wild bilberry: the July harvest started at 2.34 k t at **€5.78/kg** — a recovery from a failed 2025 but **still below the 2024 norm**; the price is structurally high on weak wild harvests. Other frozen berries (incl. blueberry) are cheap, $\approx €1.5/\text{kg}$.
- **Advice to growers:** a tight EU market will support high frozen-berry prices — plan procurement and contracting ahead and mind MRL requirements and tariff quotas.



(forecast for the first ten days of October)

- **Overall backdrop:** the height of autumn — the last **primocane raspberry** is harvested and plantings prepared for winter.
- **Thermal regime:** further **cooling** — mean daily $\approx 12\text{--}15^\circ\text{C}$; cold at night.
- **Night minima:** locally **down to 0°C and below** (to -1°C on the night of 4 October) — an **early frost risk**; unharvested berry should be protected.
- **Rainfall:** mostly **moderate** (0–4 mm/day) — moisture supply is adequate.



Ukraine's national stand (UBA)

at an international fair

Trade with the EU: the start of tariff-quota review talks

In **September** Ukraine **opened talks** with the European Commission on reviewing **tariff quotas** for farm products: industry associations are submitting data to justify higher quotas. Context — after the autonomous trade measures (ATM) expired, quotas returned to earlier levels, and quota-bound products account for $\approx 22\%$ of Ukraine's exports to the EU. For berry exporters, EU market-access terms are being shaped **right now** — a process worth watching.

State support and EU compliance

The state continues to administer **grants** for planting orchards and berry fields, greenhouses and irrigation (the mechanism of Resolution No. 738, aligned with the **Ukraine Facility** rules); applications go through the State Agrarian Register. A reminder: since **19 August 2026** the reduced ethephon MRL for blueberry is in force — align spray programmes to avoid consignments being blocked at the EU border.



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, 90% booked before it opens. 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): thousands of exhibitors from ≈ 100 countries. A key venue for **processed and frozen berry** — access to global retail chains and importers.



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

Asia's leading fresh-produce marketplace took place this month. Asia and the Gulf are promising high-value destinations for exporters of blueberry and frozen berry — worth analysing the outcomes to plan the next season.