

Analytical Report — May 2026



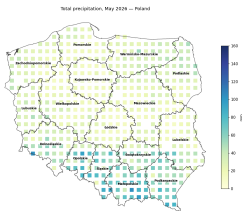
UKRAINIAN
BERRIES
ASSOCIATION

Supported by

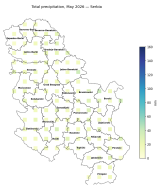


In this report:

- **May weather in Ukraine:** warmer and markedly drier than last year — 59 mm of rainfall against 93 mm; a dry first ten days, a rainy spell on 10–13 May and the last local ground frosts of mid-month. Temperature and moisture-supply maps.
- **Climate pressure on competitors:** a dry May in Poland and Serbia; the Serbian association expects only up to 15 k t of raspberry — a multi-year low that creates a deficit on the EU market.
- **Market context and media review:** industry estimates of April-frost losses, cooperation among Ukrainian blueberry growers for centralised export, and a stable frozen-blueberry market in the EU.
- **May price correction:** domestic strawberry fell from a peak of 330 to ≈ 160 UAH/kg; blueberry retreated to 850 UAH/kg at month-end — the first time this season.
- **Frozen-export dynamics:** record raspberry revenue — €223.8 million over ten months of the season, a deep bilberry deficit and further blueberry growth (Eurostat, data through March 2026).
- **June weather radar and international opportunities:** an outlook with no frost risks, GreenTech Amsterdam and Asia Fruit Logistica for planning export contacts.



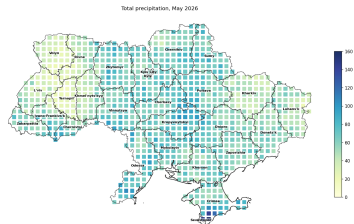
Poland: May rainfall total — on average only ≈ 26 mm



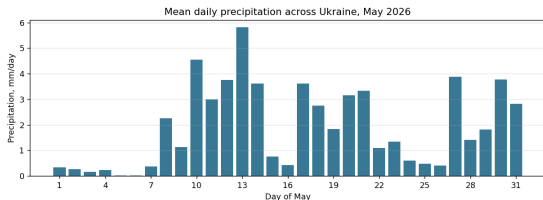
Serbia: ≈ 19 mm for the month — drought continues

- **Poland** passed May almost without rain (≈ 26 mm on average across the country) after a harsh winter with frosts down to -20°C that damaged part of the strawberry plantings, and April frosts in the orchards. The first field strawberry started at historically high prices; as supply grew, wholesale quotes corrected to 8–14 PLN/kg. Raspberry remains expensive.
- **In Serbia** the drought is not relenting (≈ 19 mm over May). The raspberry growers' association expects a crop of only up to **15 k t** — against more than 100 k t in the record 2018 year: last year's drought damaged the young shoots. The advance purchase price — 550 RSD/kg ($\approx \text{€}4.7/\text{kg}$); growers are pushing for 600–620; Arilje was additionally hit by hail.

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



May rainfall total: from 16 mm in the south to 164 mm in the Carpathians



Key indicators of the month (ERA5)

15.3°C

mean daily

(+1.8°C vs May 2025)

59 mm

rainfall this month

(−37% vs May 2025)

10 days

almost no rainfall

(first ten days — the driest)

May turned out warmer and markedly drier than last year. The first ten days passed almost without rain (less than 1 mm/day on average) — the moisture deficit at the start of early-berry fill was offset only by irrigated farms. The main rainfall came in the spells of 10–13 May and the end of the month. **The last local ground frosts** were recorded on **13–15 May** (night lows down to -4°C in the north and in valleys) — with no major consequences: the flowering of the main crops had finished by then. From 16 May steady summer warmth set in, speeding up strawberry ripening.

Ukraine

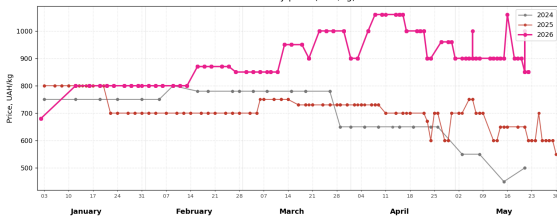
- **Industry loss estimates** from the April frosts: ≈ 1.7 k t of strawberry (over 20% of potential) and ≈ 1.2 k t of raspberry — fully consistent with UBA's model estimates in the April report.
- **A late and expensive season start:** in early May strawberry and cherry were about 50% dearer than a year earlier; as supply from the western regions grew, wholesale strawberry prices in the third-decade week fell about 14% to 170–230 UAH/kg.
- **Cooperation in blueberry:** growers are moving to centralised export and joint sales — a step towards a consolidated offer for European chains.

European Union

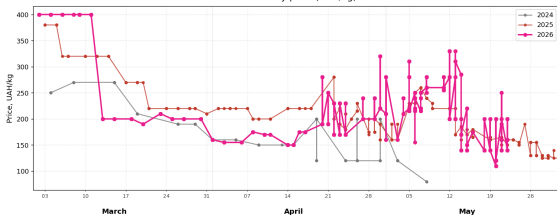
- **Frozen-blueberry market stable:** IQF berry trades in the €3.5–5.5/kg range (organic — €6–9/kg); supply is somewhat below last year's because of a cold start to the year in south-eastern Europe.
- **Climate trend:** the number of days with late spring frosts harmful to blueberry flowering rose 22% in 2020–2025 in Central Europe — demand for plantation-protection systems will grow.
- **Logistics:** over 45% of non-EU blueberry imports pass through Rotterdam; the cost and reliability of the cold chain is the key challenge for importers of fresh berry.



Blueberry price (UAH/kg)



Strawberry price (UAH/kg)



Strawberry went through a classic seasonal reversal in a short window: after a peak of 320–330 UAH/kg in early May, the price fell over three weeks to ≈ 160 UAH/kg — supply grew quickly on the back of polytunnel and open-field plantings in the western regions. The further seasonal trough is traditionally expected in mid-June to July.

Blueberry held most of the month in the 900–1000 UAH/kg range, but at the end of the third decade retreated to **850 UAH/kg** — the first sign of a price reversal ahead of the domestic season (June–July). Last year's levels (700 UAH/kg in May 2025) are still well below current ones.

Imported strawberry (155–280 UAH/kg) is gradually being flushed off the shelves, giving way to domestic berry.



Key indicators (as of Mar 2026)

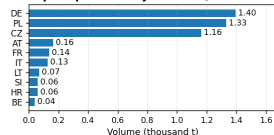
Average price this season (2025/26)Average price, latest month

Value, latest month

Volume, latest month

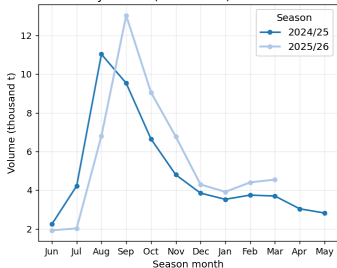
3.94 EUR/kg **4.22 EUR/kg** **19.21 M EUR** **4.55 k t**

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

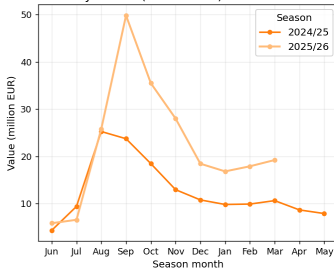


Dynamics: current season vs previous

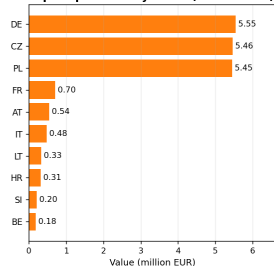
Volume dynamics (thousand t)



Value dynamics (million EUR)



Top-10 partners by value (million EUR)





Key indicators (as of Mar 2026)

Average price this season (2025/26)

Average price, latest month

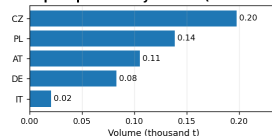
Value, latest month

Volume, latest month

5.78 EUR/kg **6.24 EUR/kg** **3.40 M EUR** **0.54 k t**

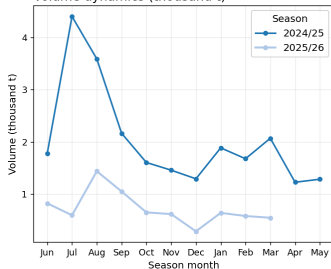
Top partner countries (in Mar 2026)

Top-10 partners by volume (thousand t)

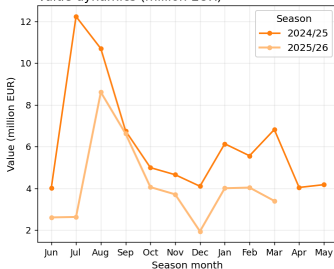


Dynamics: current season vs previous

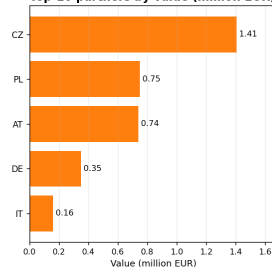
Volume dynamics (thousand t)



Value dynamics (million EUR)



Top-10 partners by value (million EUR)





Key indicators (as of Mar 2026)

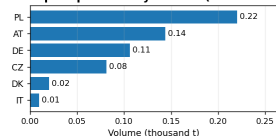
Average price this season (2025/26) Average price, latest month

Value, latest month

Volume, latest month

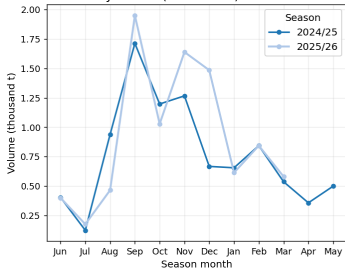
1.79 EUR/kg **1.83 EUR/kg** **1.07 M EUR** **0.58 k t**

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

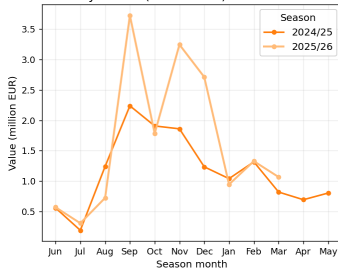


Dynamics: current season vs previous

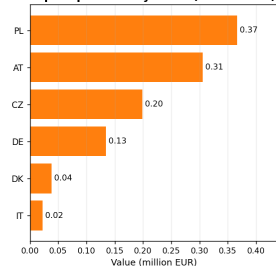
Volume dynamics (thousand t)



Value dynamics (million EUR)

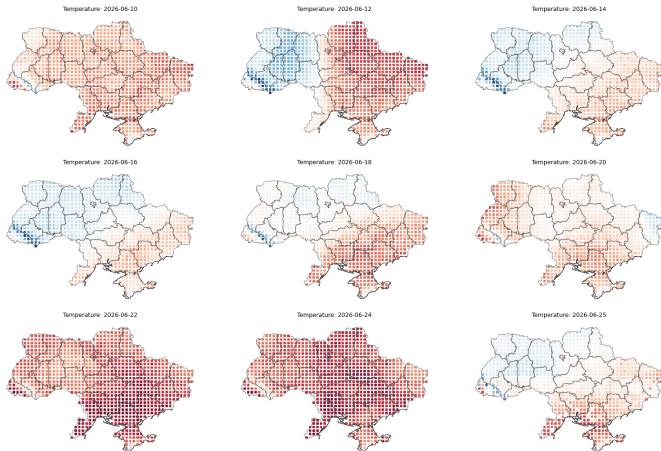


Top-10 partners by value (million EUR)





- **Raspberry — record revenue keeps rising.** Over June–March of the 2025/26 season, **56.8 k t** was exported (+7% y/y) for **€223.8 million** (+66%) at an average price of **€3.94/kg** (+55%). March became the most expensive month of the season: 4.55 k t at **€4.22/kg**. Key destinations — Poland (23.3 k t), Germany (12.7 k t), Czechia (9.8 k t).
- **Bilberry — deficit persists.** Total shipments — only **7.2 k t** against 21.9 k t a year earlier (–67%); the average price of **€5.78/kg** (+92%) partly offsets revenue (€41.7 million, –37%). Firmest demand — Czechia, Poland, Austria.
- **Blueberry — steady niche expansion.** Volume **9.2 k t** (+11%), revenue **€16.4 million** (+32%), average price **€1.79/kg** (+20%); main destinations — Poland, Austria, Czechia.
- **2026/27 context:** the expected raspberry shortfall in Serbia (up to 15 k t) and winter damage in Poland will support a high level of frozen-berry prices — an argument for Ukrainian producers to plan procurement and contracting in advance.



- **First ten days:** warm (16–21°C mean daily) with rainy spells — favourable conditions for strawberry fill and early blueberry.
- **10–20 June:** moderate warmth 17–19°C with cool nights (locally 3–7°C) and regular local rainfall — a plus for berry sugar content and shelf life.
- **21–24 June:** warming to 23–24°C mean daily — the peak of strawberry picking, the start of early blueberry and raspberry varieties.
- **No frost risks** — the temperature regime is steadily summery across the whole territory.



Ministry of Economy grant
programmes:

UAH 102.5 million disbursed
since the start of the year

Ukraine: the grant programme gains momentum

According to the Ministry of Economy, as of **25 May**, since the start of 2026 twenty enterprises have drawn **UAH 102.5 million** in grants: UAH 56.5 million — for orchards, berry-growing and viticulture (12 entities) and UAH 46 million — for greenhouse operations (8 agri-enterprises). The 2026 programme budget — **UAH 465 million**. Terms after the April update: grants up to UAH 10 million for orchards and berry plots of 1–25 ha and up to UAH 7 million for modular greenhouses; the state covers up to 70% of the project cost (up to 80% — in front-line areas). Applications — via the “Diia” portal, subject to registration in the State Agrarian Register.

EU: updated copper-residue requirements in force

From **6 May** Regulation (EU) 2026/840 applies: maximum residue levels for copper compounds have been moved into the main Annex II of Regulation 396/2005, with the residue defined as “total copper”. Berry exporters should review their copper-fungicide programmes (Bordeaux mixture, copper oxychloride): an MRL breach at the EU border blocks the shipment.



GreenTech Amsterdam 2026 — Netherlands • 9–11 June 2026

The world's leading protected-cultivation technology fair opens next week: over 550 exhibitors — greenhouses, tunnels, climate systems, energy and automation; this year's theme — “PURE”: clean technologies and smart use of data. After the 2026 frost season the event is especially relevant for planning investment in plantation protection: farms with protected cultivation and integrated systems came through the spring frosts without losses.



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

Asia's leading marketplace for fresh produce trade (AsiaWorld-Expo): over 760 exhibitors and 14,000+ buyers from 80 countries. For Ukrainian blueberry and frozen-berry exporters — a chance to scout the Asian and Gulf markets, which are rapidly growing their berry consumption, and to establish direct contacts with the region's importers and distributors.