Analytical Report — June 2026

UKRAINIAN BERRIES ASSOCIATION

Supported by

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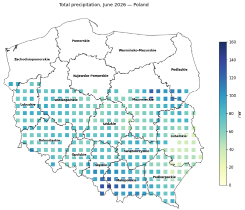
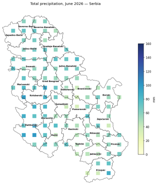
In this report:

- **June weather in Ukraine:** steady summer warmth (19.7°C on average, +0.4°C vs June 2025) and 49 mm of rainfall — a moderately wet month with no weather stress for fruit fill. Temperature and moisture-supply maps.
- **Seasonal price collapse for mass berries:** the domestic harvest crashed raspberry from ≈1050 to 170 UAH/kg and strawberry to a seasonal low of ≈130 UAH/kg; blueberry retreated below 500 UAH/kg for the first time this season.
- **Climate pressure on competitors:** Serbia expects a raspberry crop 20–30% below normal, and Poland's plantations are in uneven condition after April frosts — a tight supply backdrop for the 2026/27 freezing season.
- **Frost-season wrap-up:** industry estimates put total losses at ≈3 thousand t of berries (strawberry ≈1.74 k t, raspberry ≈1.17 k t); blueberry was virtually unaffected.
- **Record raspberry export revenue:** €239.3 million over eleven months of the season (+58% y/y); a deep bilberry deficit and steady blueberry expansion (Eurostat, data through April 2026).
- **Regulation, July radar and trade fairs:** suspension of raspberry grant applications, the EU draft cut of fenarimol MRLs, the weather outlook, and Asia Fruit Logistica and Fruit Attraction for export planning.

Climate impact on the season in competitor countries



Poland: June rainfall total — ≈74 mm on average



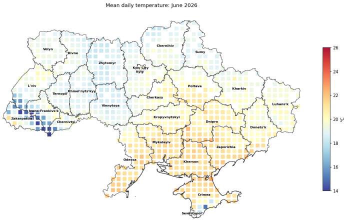
Serbia: ≈63 mm over June

- **Poland** entered the raspberry harvest window (June–August) with uneven plantation health: in the Lublin Voivodeship — the key industrial-raspberry region — damage varies substantially with the scale of the April frosts. Wholesale fresh raspberry prices held high in mid-June: €9.4–11.5/kg at Bronisze (Warsaw). Field strawberry started in early June with good fruit set.
- **Serbia's** 2026 raspberry crop is expected to be **20–30% below normal** — a consequence of last year's drought that weakened the plantings. Arilje (the "raspberry capital", up to a fifth of national exports) averages 15–20 k t a year; about 90% of the crop goes to freezing for EU processors. Low purchase prices leave growers minimal margin.

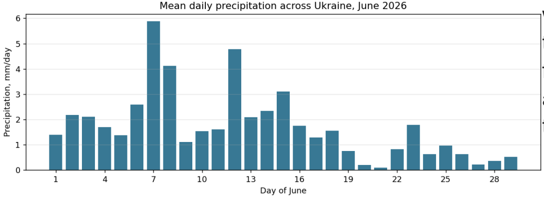
Reduced supply in the two key competitors is a favourable price window for Ukrainian frozen-raspberry exporters in the 2026/27 season.

Ukrainian Berries Association

June weather in Ukraine: temperatures and moisture supply



Mean daily temperature in June by region



Key indicators of the month (ERA5)

19.7°C
mean daily (+0.4°C vs June 2025)

49 mm
rainfall this month (+9% vs June 2025)

10 days
near-zero rainfall (rest — moderate rain)

June passed in a stable summer regime: a mean daily temperature of **19.7°C** (+0.4°C vs last June), with no extreme heat waves and no frost risk. Rainfall totalled **49 mm** (+9% vs June 2025), unevenly distributed: the wettest days were 7 and 12 June, while around 10 days of the month passed almost without rain. These conditions favoured the fill and ripening of strawberry, early raspberry and blueberry; the main challenge for rain-fed plantings in the south was moisture deficit during dry spells.

Market context: industry media review, Ukraine and the EU

Ukraine

- **Final frost estimates:** aggregate industry losses — ≈3 k t of berries, most of it strawberry (≈1.74 k t, over 20% of potential) and raspberry (≈1.17 k t); blueberry, thanks to its later development and higher frost tolerance, was barely affected.
- **Price collapse for mass berries:** the domestic harvest crashed wholesale raspberry from ≈1000 to 200 UAH/kg and below, and strawberry fell to a seasonal low — a classic seasonal correction, amplified by ripening in the western regions.
- **Blueberry export consolidation:** growers are developing joint sales through an export platform (UA GROWERS) — a centralised offer for European chains. Europe buys about 70% of Ukrainian blueberry.

European Union

- **Frozen-blueberry market stable:** IQF berry trades in the €3.5–5.5/kg range (organic — €6–9/kg). Europe imports 70–80% of its blueberry raw material (Peru, Chile), so the cost of freezing energy (+20–30% vs 2022) and of logistics remains the key price driver.
- **The Serbian raspberry shortfall** is pushing EU processors to look for alternative frozen-berry suppliers — an opportunity for Ukraine.
- **Regulatory trend:** the European Commission is preparing to lower maximum residue levels (MRLs) of fenarimol for strawberry, raspberry, currant and gooseberry to the limit of quantification — application expected in late 2026 – early 2027.

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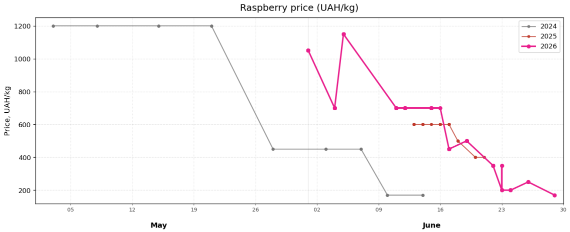
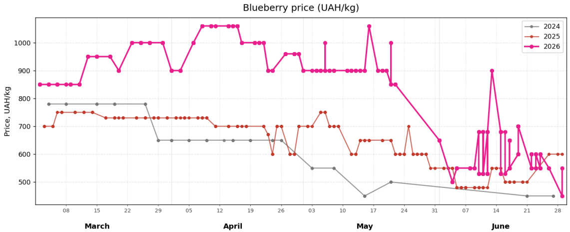
Retail berry price analysis, Ukrainian market





Raspberry. In early June, while domestic berry was still scarce, the price held at ≈1050–1150 UAH/kg. The open-field harvest only unfolded in the second half of the month (first farms — around 10 June, mass picking — after the 15th), and as supply built up the price collapsed to ≈**170 UAH/kg** by month-end — more than sevenfold. The trough traditionally falls in July.

Blueberry held at 800–900 UAH/kg until mid-month, but with the start of the domestic harvest it retreated to **450 UAH/kg** at the end of June — a first for this season.

Strawberry closed the season at seasonal-low prices: ≈130 UAH/kg (minimum — down to 55) against 190 UAH/kg early in the month; imported berry all but disappeared from the shelves.

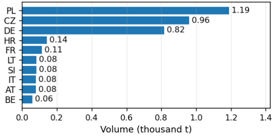
Frozen raspberry exports to the EU

Key indicators (as of Apr 2026)

Average price this season (2025/26)	Average price, latest month	Value, latest month	Volume, latest month
3.96 EUR/kg	**4.27 EUR/kg**	**15.57 M EUR**	**3.64 k t**

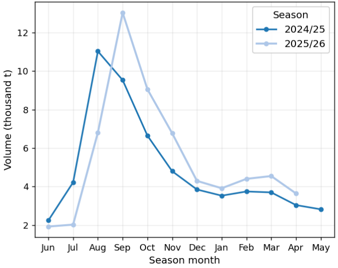
Top partner countries (in Apr 2026)

Top-10 partners by volume (thousand t)

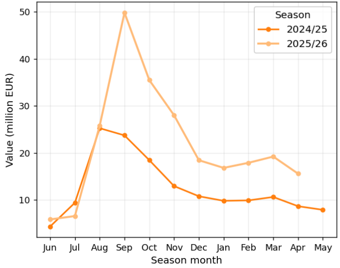


Dynamics: current season vs previous

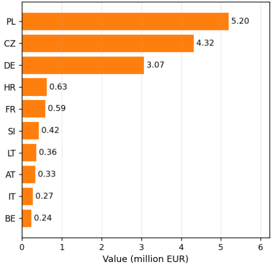
Volume dynamics (thousand t)



Value dynamics (million EUR)



Top-10 partners by value (million EUR)

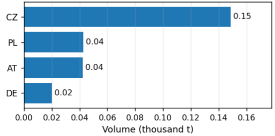


Frozen bilberry exports to the EU

Key indicators (as of Apr 2026)

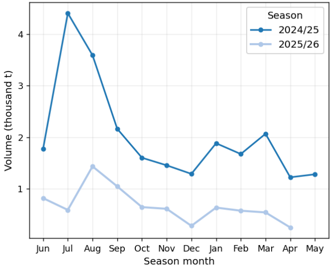
Average price this season (2025/26)	Average price, latest month	Value, latest month	Volume, latest month
5.82 EUR/kg	**7.17 EUR/kg**	**1.82 M EUR**	**0.25 k t**

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

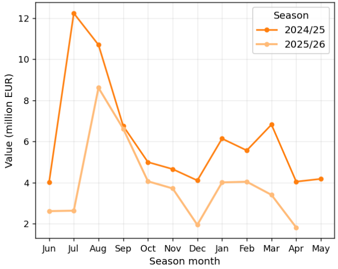


Dynamics: current season vs previous

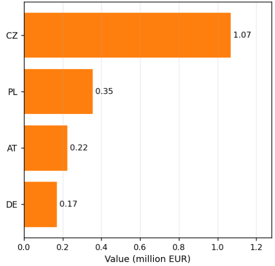
Volume dynamics (thousand t)



Value dynamics (million EUR)



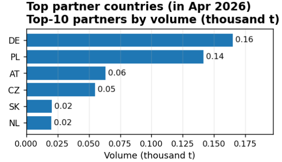
Top-10 partners by value (million EUR)



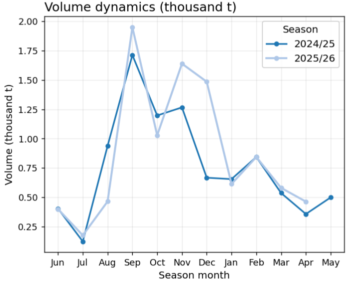
Frozen blueberry exports to the EU

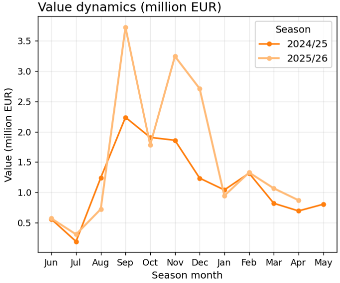
Key indicators (as of Apr 2026)

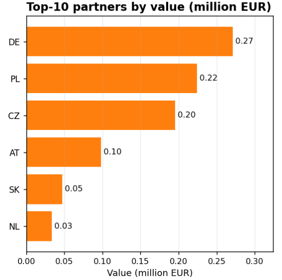
Average price this season (2025/26)	Average price, latest month	Value, latest month	Volume, latest month
1.79 EUR/kg	**1.87 EUR/kg**	**0.87 M EUR**	**0.46 k t**



Dynamics: current season vs previous







Frozen berry exports: key season takeaways

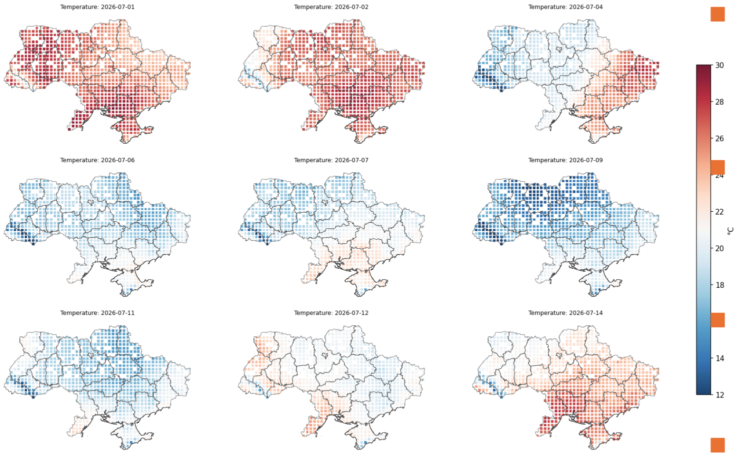
- **Raspberry — record season revenue.** Over June–April of the 2025/26 season, **60.4 k t** was exported (+2% y/y) for **€239.3 million** (+58%) at an average price of **€3.96/kg** (+54%). April stayed expensive: 3.64 k t at **€4.27/kg**. Key destinations — Poland, Czechia, Germany.

- **Bilberry — deep deficit.** Total shipments were only **7.5 k t** against 24.4 k t a year earlier (-69%); the average price of **€5.82/kg** only partly offsets revenue (€43.5 million, -41%). Firmest demand — Czechia, Poland, Austria.

- **Blueberry — steady niche expansion.** Volume **9.6 k t** (+4%), revenue **€17.3 million** (+24%), average price **€1.79/kg** (+11%); main destinations — Germany, Poland, Austria.

- **2026/27 context:** the expected raspberry shortfall in Serbia ($-20...-30$%) and Poland's uneven plantations will support high frozen-berry prices — an argument for Ukrainian producers to plan procurement and contracting in advance.

Weather radar for July 2026



Open-Meteo forecast data; visualisation and analysis by UBA

- **Overall backdrop:** steady summer warmth (18–27°C) — the peak of raspberry picking, the end of the field-strawberry season and the start of the main blueberry season.
- **Thermal regime:** a hot start (26°C) and warmth in the second decade (24–28°C); a cooler spell on 4–11 July. At the peak — plantation irrigation.
- **Rainfall:** moderate, uneven (up to 9 mm/day in early-to-mid month) — a local risk of berry cracking and grey mould.
- **No frost risks** — the regime is steadily summery.

Regulatory changes and support programmes

Grant programme: raspberry applications suspended after the planting-area cap was reached

Ukraine: raspberry grant cap exhausted

The Ministry of Economy suspended **from 23 June** the intake of grant applications for growing **raspberry** — because the ceiling on supported planting areas was exceeded. Intake for other crops (blueberry, other berries, orchards) continues. Exhaustion of the “raspberry” cap specifically reflects strong grower interest in establishing new plantations — despite the seasonal retail-price collapse, the export economics of frozen raspberry remain attractive.

EU: draft MRL cut for berries

The European Commission is preparing to lower maximum residue levels (MRLs) of **fenarimol** for strawberry, raspberry, currant and gooseberry to the limit of quantification (LOQ); application is expected in late 2026 – early 2027. Exporters should review fungicide programmes in good time: an MRL breach at the EU border blocks the shipment. We also recall the updated copper-residue requirements in force since May (Regulation (EU) 2026/840).

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Events and initiatives: international trade fairs

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.

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

One of the world's largest fresh fruit and vegetable fairs (IFEMA Madrid); the 18th edition — almost fully booked by exhibitors already in spring. Europe's No. 1 venue for reaching EU retail chains: securing direct contracts for fresh blueberry, raspberry and strawberry, and reviewing packaging and logistics solutions for next season's exports.