

Analytical Report — April 2026



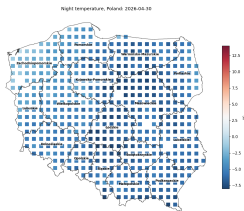
UKRAINIAN
BERRIES
ASSOCIATION

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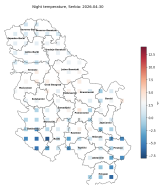
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In this report:

- **Two waves of April frost:** 9–13 April — the deepest night lows; 29–30 April — the widest territorial reach, already at the flowering stage. Night-temperature maps for Ukraine, Poland and Serbia.
- **Flower-loss assessment:** a calculation based on the ERA5 reanalysis — garden strawberry $\approx 19\%$, raspberry $\approx 23\%$; blueberry — no flower loss, but $\approx 10\%$ winter damage to plantings.
- **Growers' challenges and sentiment:** a farm survey — actual losses from 0% to 70% and which protection methods really worked.
- **April price anomalies:** blueberry sets new highs (up to 1060 UAH/kg), and the first domestic strawberry gets dearer against the seasonal trend.
- **Frozen-export dynamics:** record revenue for Ukrainian raspberry, a bilberry deficit and blueberry growth on the EU market (Eurostat, data through February 2026).
- **May weather radar and international opportunities:** when the late-frost risk passes and which trade fairs will shape the new season's contracts.



Poland, night of 30 April: frost across the whole territory



Serbia, night of 30 April: frost only in the mountains

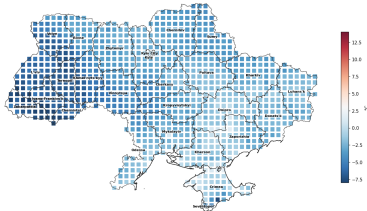
Late April brought an Arctic intrusion into Central Europe that touched all the region's key berry producers.

- **In Poland** both cold waves were felt: on the nights of 10 and 29–30 April sub-zero temperatures were recorded across almost the entire country, with lows down to $-7 \dots -9^{\circ}\text{C}$. The later phenology softens the blow: the main raspberry plantings had not yet entered flowering.
- **In Serbia** the first wave (10 April) covered most of the territory, whereas at month-end the cooling reached only the mountain districts of the south-west — notably the Zlatibor raspberry belt, where the night of 30 April fell to $-5 \dots -7^{\circ}\text{C}$.

For Ukraine the schedule was the opposite: the widest wave of 29–30 April coincided with the flowering of early varieties — more on this next.

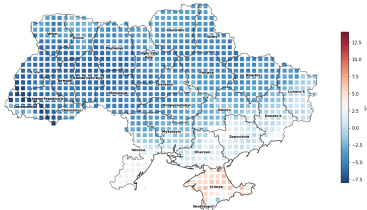


Night temperature: 2026.04.10



10 April: deep lows, but flowering had not yet begun

Night temperature: 2026.04.30



April brought two frost waves: 9–13 April — the deepest lows (locally down to $-6 \dots -8^{\circ}\text{C}$), when most plantings were not yet in flower, and **the most damaging wave of 27–30 April, peaking on 29–30 April** — night frost covered over half the territory precisely during the flowering of early varieties.

Cumulative flower losses (1–30 April)

≈19%

Garden strawberry

flower loss from frost

≈23%

Raspberry

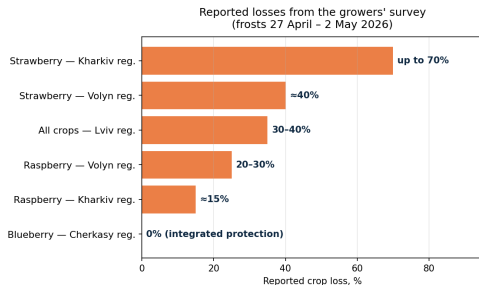
flower loss from frost

≈10%

Blueberry

winter damage to plantings*

Blueberry avoided spring-frost losses thanks to its later phenology — in April the buds were in resistant stages (critical temperatures below -7°C). *Instead, plantings suffered winter damage — roughly 10% of plants (up to 20% in some varieties), consistent with the berry's price dynamics.



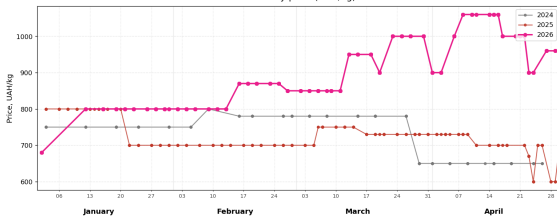
Survey of UBA members, May 2026. Farms in the Volyn, Lviv,
Cherkasy and Kharkiv regions.

Farms recorded frosts **from 27 April to 2 May** at temperatures of -1.5 to -4°C (on some fields down to -7°C); reported losses of 0–70% depending on protection methods:

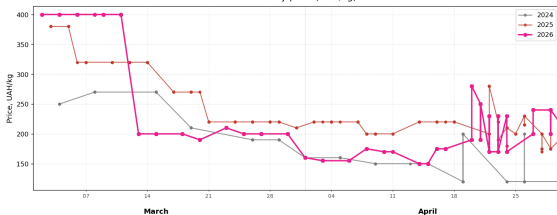
- Integrated protection:** smoke screening, anti-stressant treatments and glycerine cannons over 100 ha of blueberry (Cherkasy region) kept the plantings without losses.
- Partial effectiveness:** fleece plus smoke screening (Volyn region) limited strawberry losses to $\approx 40\%$ versus $\approx 70\%$ without thermal protection.
- Limits of effectiveness:** wind gusts (Kharkiv region) made fleece installation impossible, and smoke screening is of little use in advective frosts; at -7°C at field level (Lviv region), sprinkling with smoke screening did not prevent losses of 30–40%.



Blueberry price (UAH/kg)



Strawberry price (UAH/kg)



In April 2026 the retail price of **blueberry** continued its record trajectory: the month opened at 900 UAH/kg, in mid-April the price reached an all-time high of 1060 UAH/kg and closed the month at 960 UAH/kg. That is a third higher than April 2025 (600–730 UAH/kg) — the result of reduced berry supply on the market.

Strawberry opened the domestic season on **20 April** — the first batches at 280 UAH/kg. Unlike 2025, when the price fell after sales began, this year it rose to 320 UAH/kg by month-end: the frosts of 27–30 April cut the supply of early berry.

Imported strawberry: 150–220 UAH/kg, also dearer at month-end.



Key indicators (as of Feb 2026)

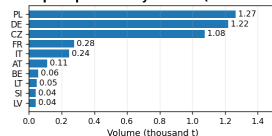
Average price this season (2025/26)Average price, latest month

Value, latest month

Volume, latest month

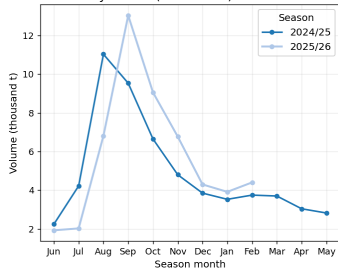
3.92 EUR/kg **4.06 EUR/kg** **17.88 M EUR** **4.40 k t**

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

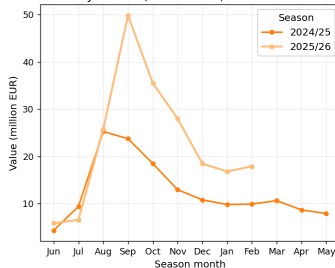


Dynamics: current season vs previous

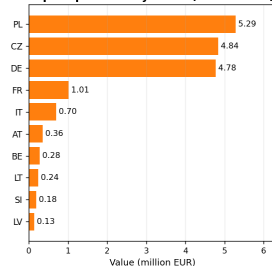
Volume dynamics (thousand t)



Value dynamics (million EUR)



Top-10 partners by value (million EUR)





Key indicators (as of Feb 2026)

Average price this season (2025/26)

5.74 EUR/kg

Average price, latest month

6.99 EUR/kg

Value, latest month

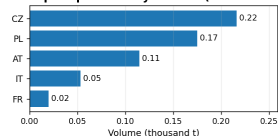
4.04 M EUR

Volume, latest month

0.58 k t

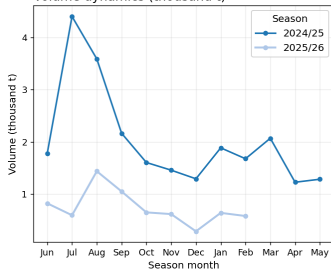
Top partner countries (in Feb 2026)

Top-10 partners by volume (thousand t)

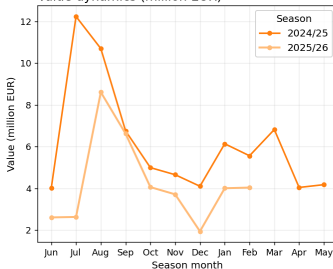


Dynamics: current season vs previous

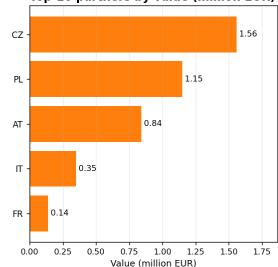
Volume dynamics (thousand t)



Value dynamics (million EUR)



Top-10 partners by value (million EUR)





Key indicators (as of Feb 2026)

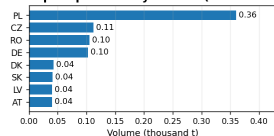
Average price this season (2025/26) Average price, latest month

Value, latest month

Volume, latest month

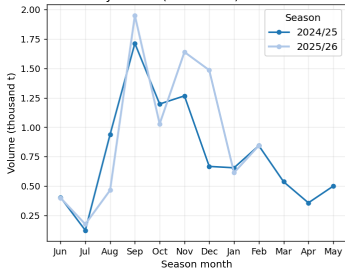
1.78 EUR/kg **1.57 EUR/kg** **1.33 M EUR** **0.84 k t**

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

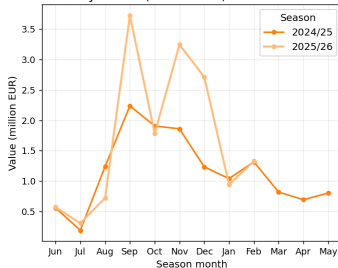


Dynamics: current season vs previous

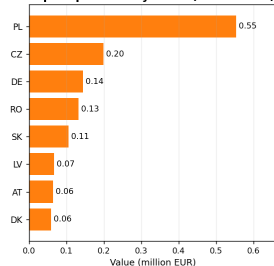
Volume dynamics (thousand t)



Value dynamics (million EUR)

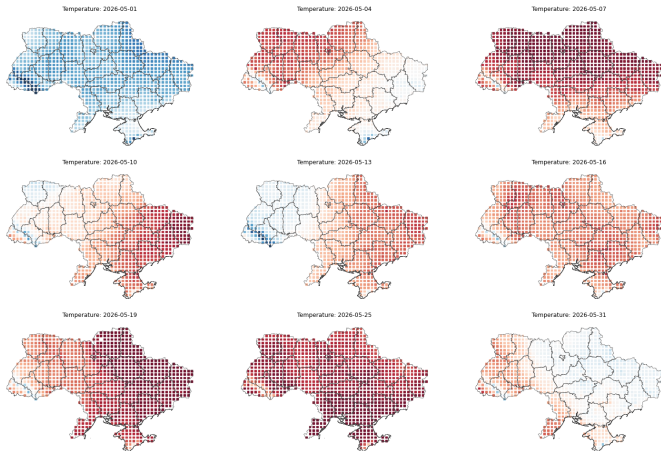


Top-10 partners by value (million EUR)





- **Raspberry — record revenue.** Over June–February of the 2025/26 season, **52.2 k t** was exported (+5% y/y) for **€204.6 million** (+64%): growth driven by an average price of **€3.92/kg** against €2.51/kg a year earlier (+56%). Key destinations — Poland (21.9 k t), Germany (11.3 k t) and Czechia (8.7 k t).
- **Bilberry — deep raw-material deficit.** Shipments fell to **6.7 k t** against 19.9 k t a year earlier (–66%) after a weak harvest season. The price nearly doubled — to **€5.74/kg** (+93%), which partly offset revenue (€38.2 million, –35%). Firmest demand — Czechia, Poland, Austria.
- **Blueberry — confident growth.** Volume **8.6 k t** (+10%), revenue **€15.3 million** (+32%), average price **€1.78/kg** (+20%). Expanding shipments to Poland, Austria and Czechia confirm the formation of a stable export niche for Ukrainian garden blueberry.
- **Context for prices:** the bilberry deficit and rising frozen-berry prices are among the drivers of record retail blueberry prices on the domestic market in April.



- 1–3 May:** a cold start — the residual effect of the April intrusion, with local night frosts in places.
- 4–12 May:** steady warming; mean daily temperatures up to 10–12°C.
- 13–15 May:** a brief cooling, locally night lows below 0°C in the north and in valleys.
- 16–31 May:** steady summer warmth (15–20°C), 11–12°C at month-end; no frost risks — active growth and fill of early berry.



Updated grant rules apply from
the 2026 season

Ukraine: update of grant programmes for berry growers

On **22 April** the Cabinet of Ministers adopted amendments to Resolution No. 738 on grants for orchards, berry-growing, greenhouses and fruit-and-vegetable storage, bringing the programme closer to EU rules: mandatory screening of recipients under the Ukraine–EU Framework Agreement (Ukraine Facility), a ban on financing sanctioned entities, and “financed by the European Union” project labelling. For storage facilities a grading by capacity of 500–6,000 t was introduced, with grants from UAH 4 to 20 million — smaller farms gained real access to berry-storage infrastructure financing for the first time. The updated rules will apply from the 2026 season.

EU: updated copper-residue requirements

On **16 April** Regulation (EU) 2026/840 (of 15 April) was published in the EU Official Journal: 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”; it applies from **6 May 2026**. For berry exporters this is a signal to control copper-fungicide programmes (Bordeaux mixture, copper oxychloride) more closely — an MRL breach at the EU border blocks the shipment.



Macfrut 2026 — Rimini, Italy • 21–23 April 2026

Italy's leading fruit-and-vegetable-sector fair took place in the reporting month and, as usual, spanned the whole chain — from nurseries and growing technology to logistics and packaging. For Ukrainian berry producers it is a venue for contacts with suppliers of seedlings, protected-cultivation equipment and fertigation systems, and for tracking the technology trends of Mediterranean competitors.



GreenTech Amsterdam 2026 — Netherlands • 9–11 June 2026

The world's leading protected-cultivation technology fair: over 550 exhibitors — greenhouses, tunnels, climate systems, energy and automation. After the April frosts the theme is especially relevant for Ukrainian berry-growing: it was farms with protected cultivation and integrated protection systems that came through this year's frosts without losses. The event is worthwhile for planning investment in plantation protection for the 2027 season.