

Analytical Report — August 2026



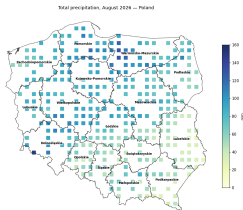
UKRAINIAN
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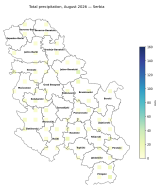
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In this report:

- **August weather in Ukraine:** moderate warmth (22.3°C on average) in a **very dry month** — July's 69 mm gave way to only **≈19 mm**; irrigation demand rose at peak ripening, with no frost risk.
- **Blueberry found its seasonal floor:** at the peak of the domestic harvest the price settled to **≈135–240 UAH/kg** (≈100 at the farm gate), yet frost-driven crop losses keep growers squeezed between low price and low volume.
- **Raspberry rose:** in the gap between the summer and the autumn (primocane) crops the retail price climbed to **≈230–270 UAH/kg**.
- **The 2025/26 export season closed at a record:** raspberry — **€250.8 million** (+65% y/y); the new 2026/27 season opened high — in June raspberry shipped at **€4.14/kg** (Eurostat, data through June 2026).
- **Ukraine — world leader in net frozen-raspberry exports;** with Serbia's crop the lowest in 30 years and frost damage in Poland, it may top the market by total volume too in 2026/27.
- **Regulation and events:** state grants for orchards and berries (UAH 440 million), the ethephon MRL for blueberry now in force, September EU quota talks; leading fairs for export contracting.



Poland: August rainfall total — about 74 mm on average



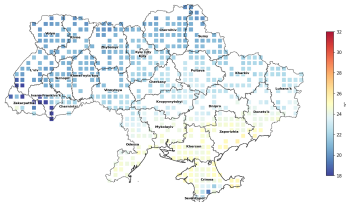
Serbia: only about 7 mm over August (drought)

- **Poland** in August — the mass blueberry harvest is winding down. Peak supply is behind: **Bluecrop** is fading, newer varieties (Draper, Calypso) are mid-harvest. Spring frosts hit **Chandler** (about 1.5 instead of ≈ 5 kg/bush), so purchase prices **rose** — around 15 zloty/kg ($\approx \text{€}3.5$) versus a seasonal low of 10 zloty; part of the crop goes into cold storage to sell higher later. Weather was wet (≈ 74 mm) and moderate.
- **Serbia** — an extremely dry, hot August (≈ 7 mm, 24.5°C) after the driest June on record. The 2026 raspberry crop is put at ≈ 30 k t versus a ≈ 65 k t norm — the lowest in three decades (frosts + disease + heat). IQF raspberry reached $\approx \text{€}7/\text{kg}$ (+51% y/y).

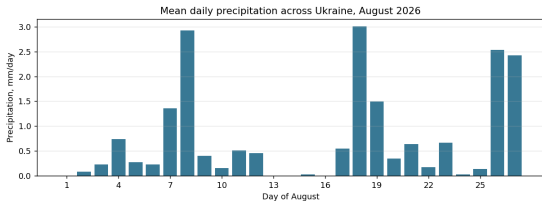
Reduced supply in the two key competitors — a favourable price window for Ukrainian frozen-berry exporters in the 2026/27 season.



Mean daily temperature: August 2026



Mean daily August temperature by region



Key monthly indicators (ERA5)

22.3°C

mean daily
(moderate summer
warmth)

≈19 mm

rainfall this month
(very dry, ≈28% of
July)

none

frost
risks

August 2026 was moderately warm (**22.3°C** on average, with no waves of extreme heat) but **unusually dry**: only **≈19 mm** of rainfall — roughly a third of July's 69 mm. The largest moisture deficit was in the south and east. At the peak of blueberry ripening and the start of the autumn raspberry this **raised irrigation demand**, yet lowered the risk of berry cracking and grey mould, improving shelf-life. There were no frost risks.

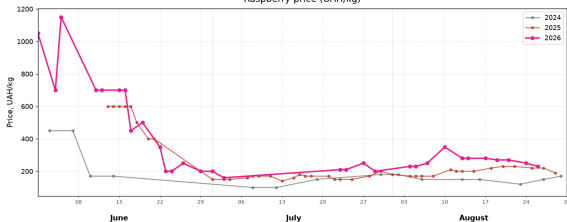
Ukraine

- **Blueberry: the season's paradox.** Despite frost-driven crop losses, at the peak of the domestic harvest the price **fell to a seasonal low**: ≈ 100 UAH/kg at the farm gate, ≈ 200 at retail. The Ukrainian blueberry season runs to about the end of August.
- **Raspberry is rising:** in the gap between the summer and autumn (primocane) crops retail climbed to ≈ 230 – 270 UAH/kg — the sector's bet on **autumn varieties** strengthens its export position.
- **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

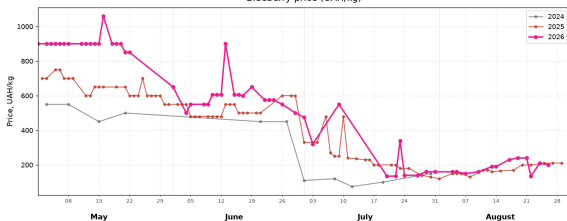
- **Raspberry: a historic shortfall.** Serbia's crop is ≈ 30 k t (the lowest in 30 years); IQF price $\approx \text{€}7/\text{kg}$ (+51% y/y). Whole frozen berry in the EU is up to $\approx \text{€}4.6/\text{kg}$ and **hard to find** — a window for Ukraine.
- **Poland: blueberry is dearer** amid frost damage to Chandler; purchase prices rose to $\approx \text{€}3.5/\text{kg}$; part of the crop moves into cold storage for later sale.
- **Regulatory trend:** from **19 August 2026** the ethephon MRL for blueberry is cut to the limit of determination (EU Regulation 2026/215) — exporters should align spray programmes to avoid consignments being blocked at the border.

Raspberry price (UAH/kg)



Raspberry. After July's seasonal low (≈ 170 – 200), the price **rose in August to ≈ 230 – 270 UAH/kg** — the gap between the fading summer berry and the arrival of autumn (primocane) varieties. The trend matches rising world prices for frozen raspberry.

Blueberry price (UAH/kg)



Blueberry. Unlike July (chaotic 135 – 600), in August the domestic berry **found its seasonal floor: ≈ 135 – 240 UAH/kg** (median ≈ 190), firming to ≈ 200 by month-end. Notably, the floor came **despite a poor crop**: over the short harvest peak supply concentrates and imports recede.

Strawberry — outside its main season: residual and greenhouse lots hold at ≈ 100 – 180 UAH/kg.



Key indicators (as of Jun 2026)

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

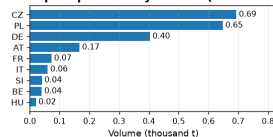
Value, latest month

Volume, latest month

4.14 EUR/kg **4.14 EUR/kg** **8.89 M EUR** **2.15 k t**

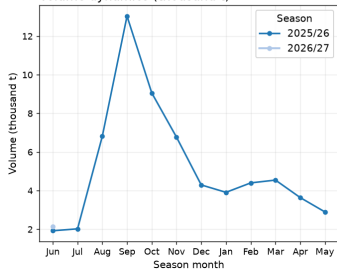
Top partner countries (in Jun 2026)

Top-10 partners by volume (thousand t)

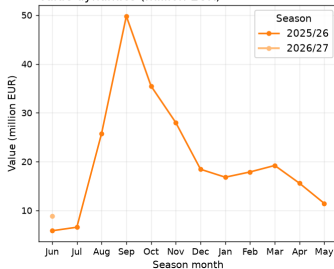


Dynamics: current season vs previous

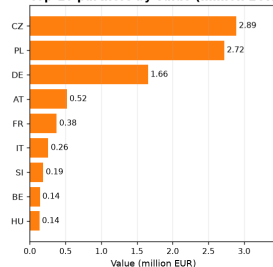
Volume dynamics (thousand t)



Value dynamics (million EUR)



Top-10 partners by value (million EUR)





Key indicators (as of Jun 2026)

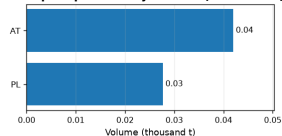
Average price this season (2026/27) Average price, latest month

Value, latest month

Volume, latest month

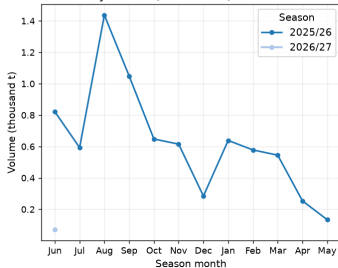
7.01 EUR/kg **7.01 EUR/kg** **0.49 M EUR** **0.07 k t**

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

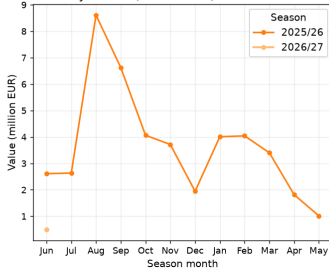


Dynamics: current season vs previous

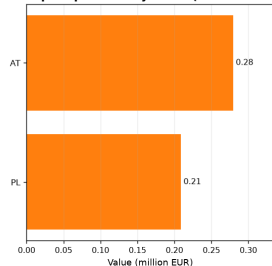
Volume dynamics (thousand t)



Value dynamics (million EUR)



Top-10 partners by value (million EUR)



Key indicators (as of Jun 2026)

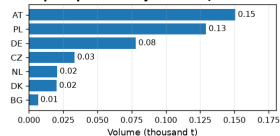
Average price this season (2026/27) average price, latest month

Value, latest month

Volume, latest month

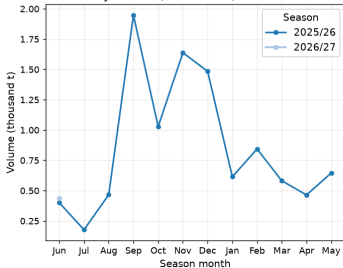
1.39 EUR/kg 1.39 EUR/kg 0.61 M EUR 0.44 k t

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

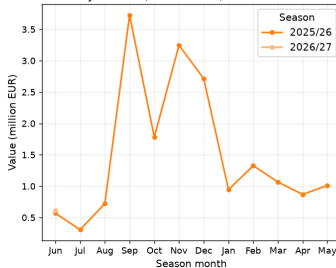


Dynamics: current season vs previous

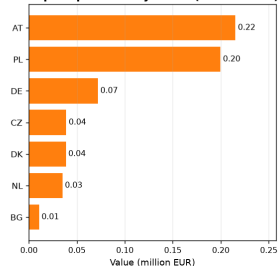
Volume dynamics (thousand t)



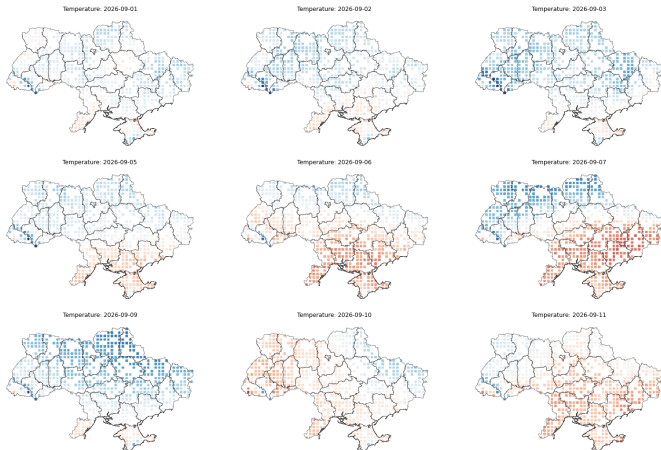
Value dynamics (million EUR)



Top-10 partners by value (million EUR)



- **Raspberry — the record 2025/26 season is closed.** Over June–May, **63.3 k t** was exported for **€250.8 million** (+65%) at an average €3.96/kg. The new 2026/27 season started high: in **June** — 2.15 k t at **€4.14/kg** (above last season's average). Destinations — Czechia, Poland, Germany.
- **Ukraine — world leader in net frozen-raspberry exports** (since 2024, ≈65 k t/year). With Serbia's crop down (–50%) and frost damage in Poland, Ukraine may lead **by total volume too** in 2026/27 — a bet on primocane varieties.
- **Bilberry and other berries.** Season 2025/26: bilberry — 7.6 k t / €44.5 million (a deficit, €5.85/kg); other frozen berries (incl. blueberry) — 10.3 k t / €18.3 million (€1.78/kg). For reference (IBO 2026): Ukraine is **#3 worldwide** in wild bilberry harvest (10.8%), which fell 53% in 2025 due to frosts.
- **Advice to growers:** the shortfall in Serbia and Poland will support high frozen-berry prices — plan procurement and contracting ahead.



- Overall backdrop:** transition to early autumn — the blueberry season ends, the **autumn raspberry** and late varieties are in full swing.
- Thermal regime:** gradual **cooling** — mean daily $\approx 18\text{--}22^\circ\text{C}$; still warm by day, markedly cooler at night.
- Night minima:** in the first ten days of September locally **+3...+6°C** — early cool nights improve colour and flavour of late berries.
- Rainfall:** mostly **light** — irrigation demand persists; no frost risk for berry crops.



Ukraine's national stand (UBA)

at an international fair

Ukraine: state support for orchards and berry growing

Through the restored **Ministry of Agrarian Policy**, the state administers grants for planting orchards and berry fields, greenhouses and irrigation (the updated mechanism of Resolution No. 738). The 2026 budget is **UAH 440 million**, of which farmers have already used **≈UAH 250 million**; applications go through the State Agrarian Register (DAR). For berry growers this is a direct tool to finance new plantings and irrigation — the key yield reserve.

EU: ethephon MRL now in force and September quota talks

From **19 August 2026** the cut of the **ethephon** MRL for blueberry to the limit of determination took effect (EU Regulation 2026/215): an exceedance blocks the consignment at the EU border. Separately, in **September** Ukraine resumes talks with the European Commission on **reviewing tariff quotas** for farm products — a signal of an evolving trade framework worth watching.



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

Asia's leading fresh-produce marketplace — **opening this week**. A gateway to Asian and Gulf markets for exporters of blueberry and frozen berry; for Ukrainian suppliers, a chance to establish a foothold on high-value destinations.



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. A month to go — 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): ≈ 295 k professionals from ≈ 200 countries. A key venue for **processed and frozen berry** — access to global retail chains and importers.