



# Raspberry market analysis

**OKSANA MAKARCHUK, PhD in Economics,  
Associate Professor of the Department of Statistics  
and Economic Analysis**



## Types of markets and the position of the raspberry market

By economic  
purpose

Food market

By product type

Agricultural (fruit and  
vegetable) market

In terms of  
competition

Perfect competition  
(a large number of  
producers; limited  
influence of individual  
producers on prices;  
standardised  
products (particularly  
for freezing))

In terms of  
duration of  
operation

Seasonal market  
(partially offset by  
greenhouse  
production and  
imports)

By geographical  
coverage

Domestic (fresh,  
frozen)  
  
International  
(frozen)

By sales channel

Contract-spot (a  
significant  
proportion of  
contracts with  
processors and  
exporters;  
  
spot purchases  
during the peak  
harvest period).



## Raspberry market segments

### Product-based segmentation

Fresh raspberries short shelf life; local and regional markets; high price, high wastage.

Frozen raspberries (IQF) main export segment; standardised quality; dominates in B2B.

Processed raspberries purees, concentrates, juices;

lower price; stable industrial demand.

### By consumer type

#### B2C

end consumers; retail, markets.

#### B2B

processors;

exporters;

HoReCa;

food industry.

### By production method

Traditional production

Intensive production

Organic raspberries (premium niche segment)

### By type of transaction

Forward

Spot

Forward-spot (the dominant model)

## Market trends



### The dominance of the frozen food sector

the growing demand for IQF (Individual Quick Freezing) in the EU;

its consistent use in the food industry.

### Strengthening the focus on exports

Ukraine as a supplier of raw materials;

competition with Poland and Serbia;

increasing demands for quality and traceability.

### Extension of contractual relations

long-term contracts with processors;

reduced price risks;

predictable income.

### Growth in the organic segment

premium prices;

strict certification requirements;

a niche but promising market.

### Investment in infrastructure

cooling;

flash freezing;

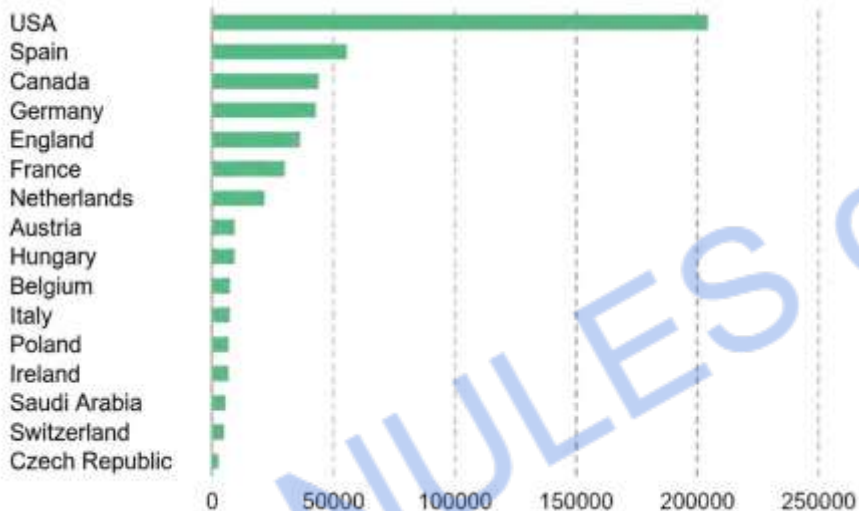
sorting and packaging.

## Challenges facing the industry

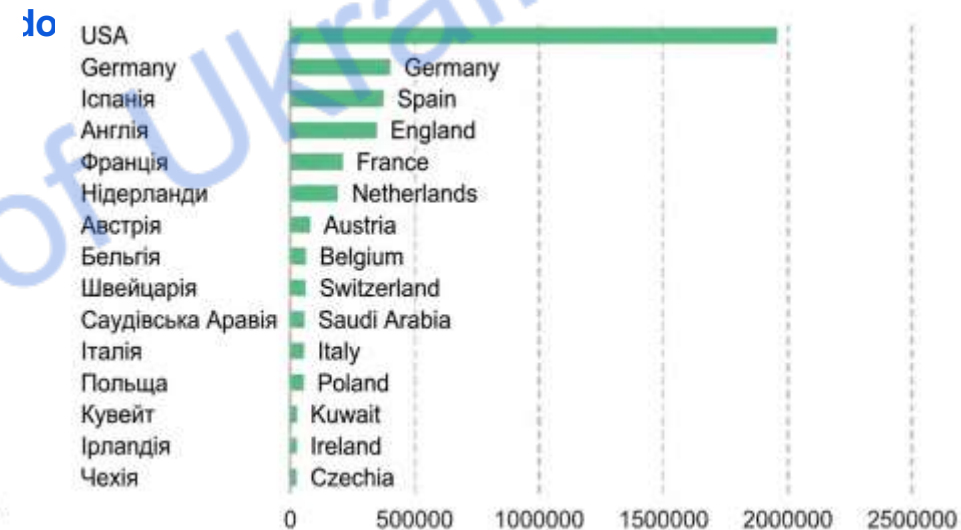


1. High dependence on weather conditions spring frosts, summer droughts, heavy rainfall; significant fluctuations in yield and quality
2. Price volatility sharp falls in prices during peak harvesting periods; dependence on global prices for frozen raspberries; weak bargaining position of small-scale producers.
3. Shortage of seasonal labour; labour-intensive manual harvesting; rising labour costs; labour migration abroad.
4. Limited storage and processing infrastructure shortage of cold storage capacity; dependence on intermediaries and processors; quality losses due to logistical delays.
5. Low level of contractual relations predominance of spot sales; lack of long-term contracts; instability of producers' incomes.
6. High international competition dominance of major exporters (Poland, Serbia, Chile); price pressure from the global market; importers' strict requirements regarding quality and certification.
7. Standards and certification requirements the need for GlobalG.A.P. and organic certification; additional costs for producers; the difficulty of entering premium markets.
8. Low level of technological modernisation outdated varieties; insufficient adoption of intensive technologies; limited access to investment.
9. Fragmentation of production high proportion of small-scale farms; weak cooperation; difficulty in forming large consignments.

**Fig. 1. Main importers of fresh raspberries worldwide in 2024, tonnes**

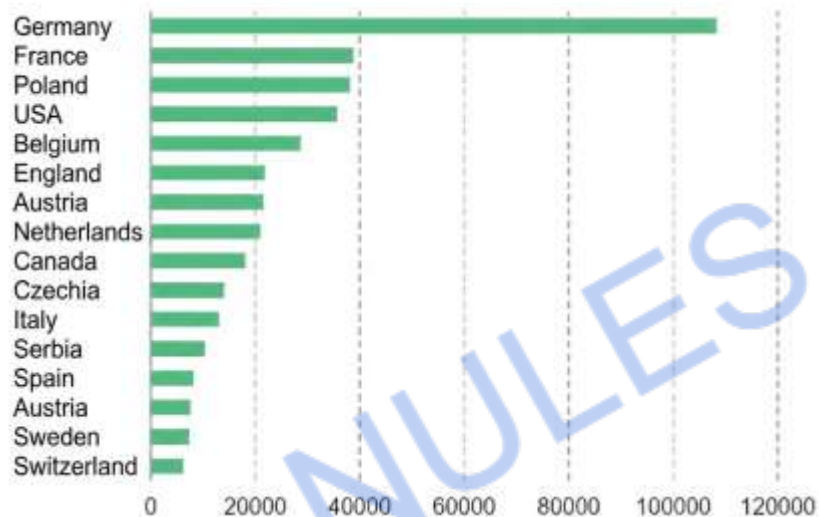


**Fig. 2. Value of fresh raspberry imports by the world's major importing countries in 2024, in thousands US \$**

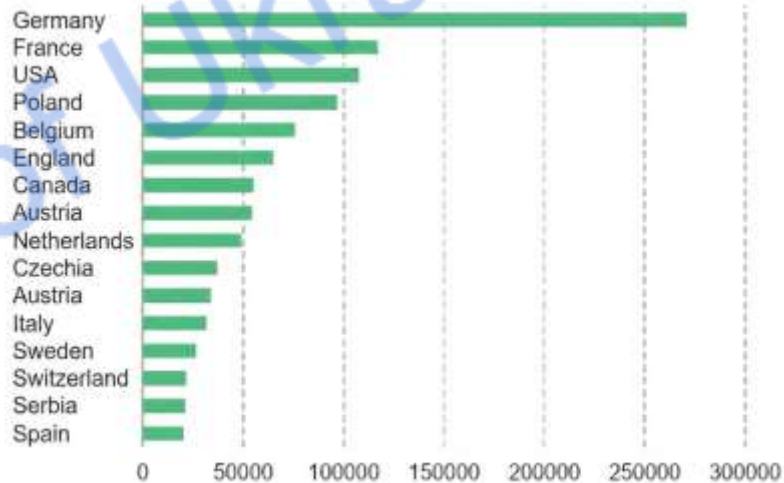


Source: Compiled from data UN Comtrade data base, <https://comtradeplus.un.org/TradeFlowtrade>

**Fig. 3. Main importers of frozen raspberries worldwide in 2024, tonnes**

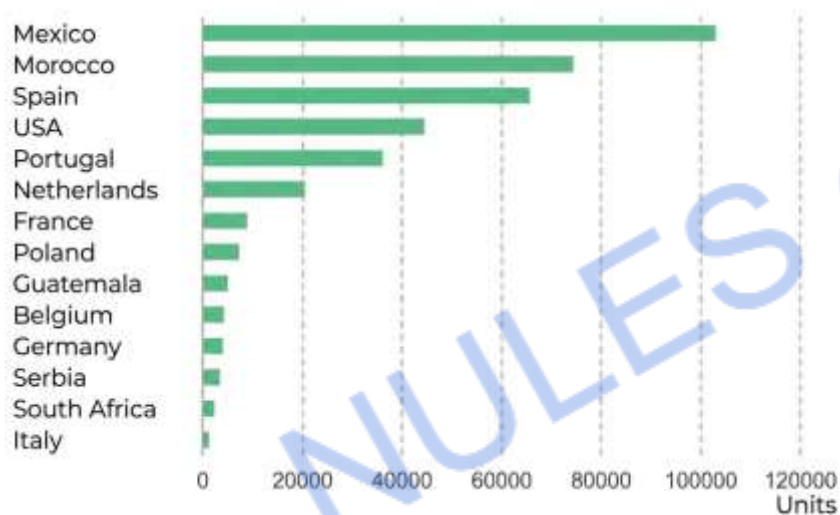


**Fig. 4. Value of frozen raspberry imports by the world's main importing countries in 2024, thousand USdollar**

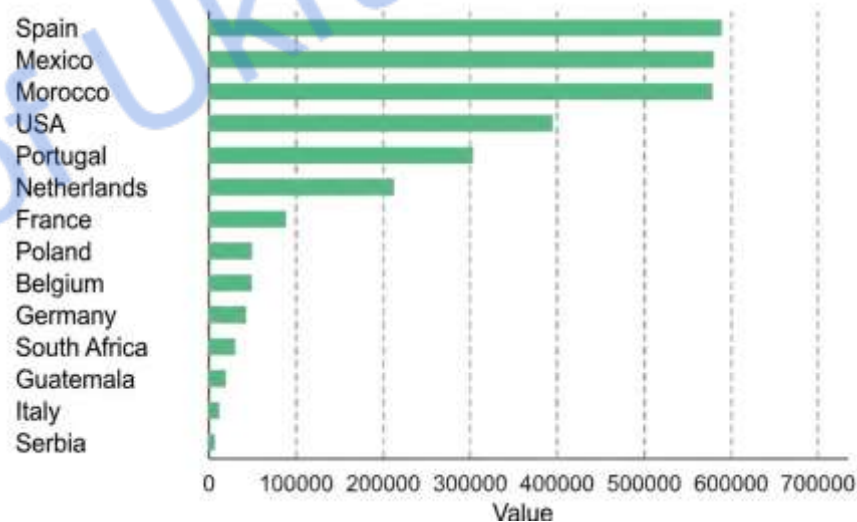


Source: Compiled from data UN Comtrade data base, <https://comtradeplus.un.org/TradeFlowtrade>

**Fig. 5. Leading global exporters of fresh raspberries in 2024, tonnes**

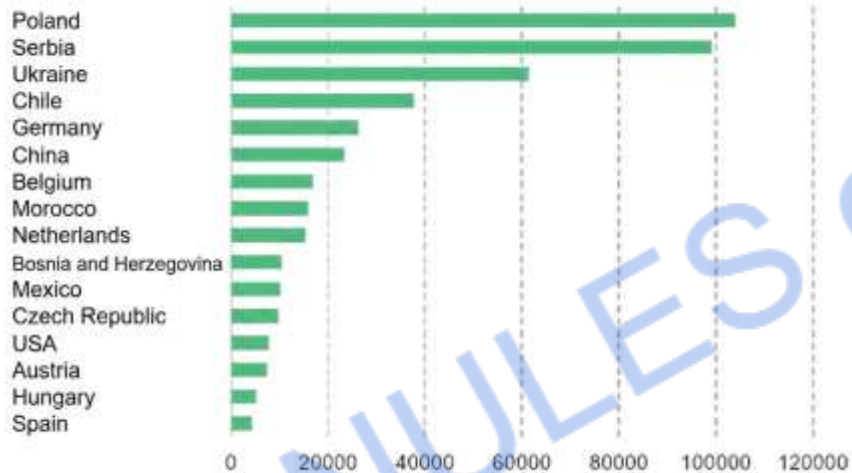


**Fig. 6. Value of fresh raspberry exports by the world's leading exporting countries in 2024, thousand US dollars**

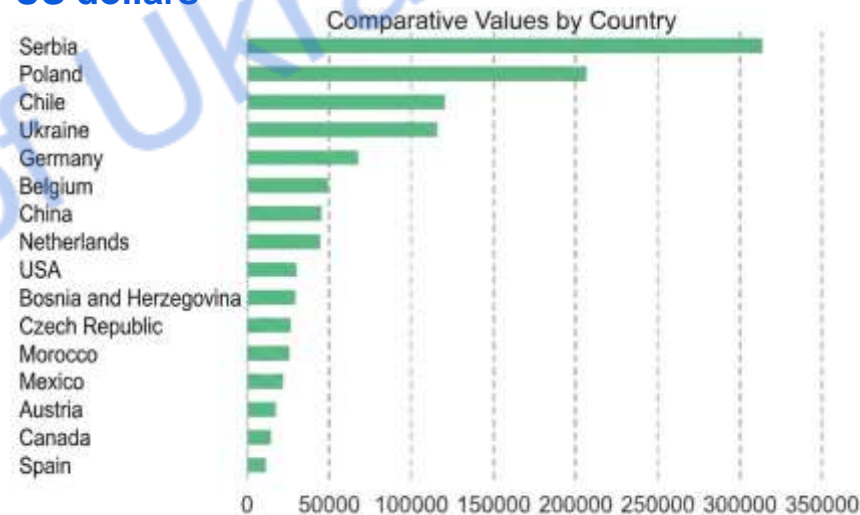


Source: Compiled from data UN Comtrade data base, <https://comtradeplus.un.org/TradeFlowtrade>

**Fig. 7. Leading global exporters of frozen raspberries in 2024, tonnes**

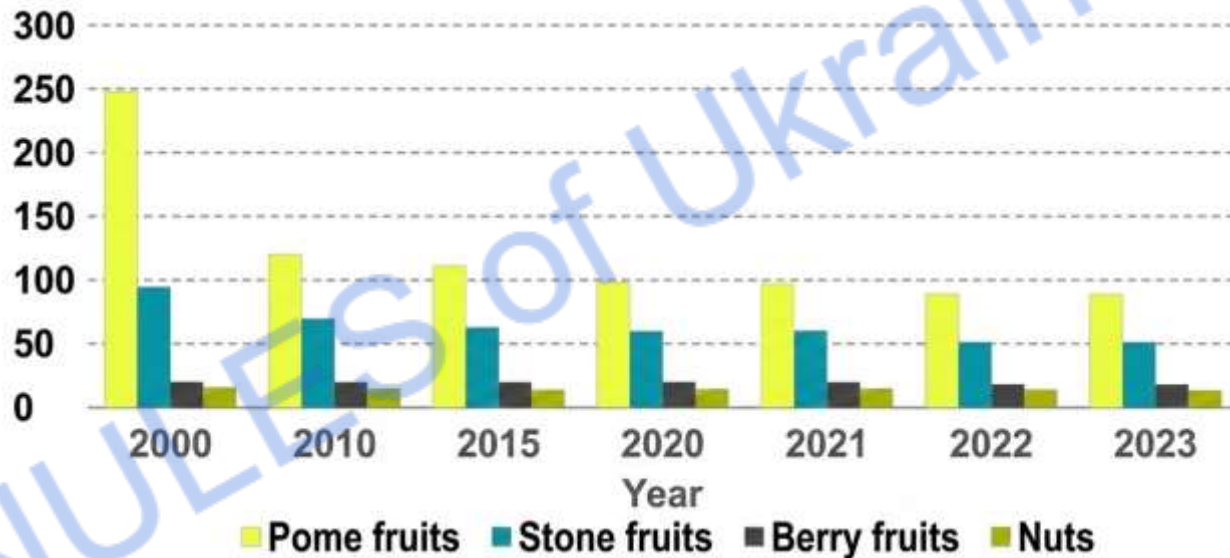


**Fig. 8. Value of frozen raspberry exports by the world's leading exporting countries in 2024, thousand US dollars**



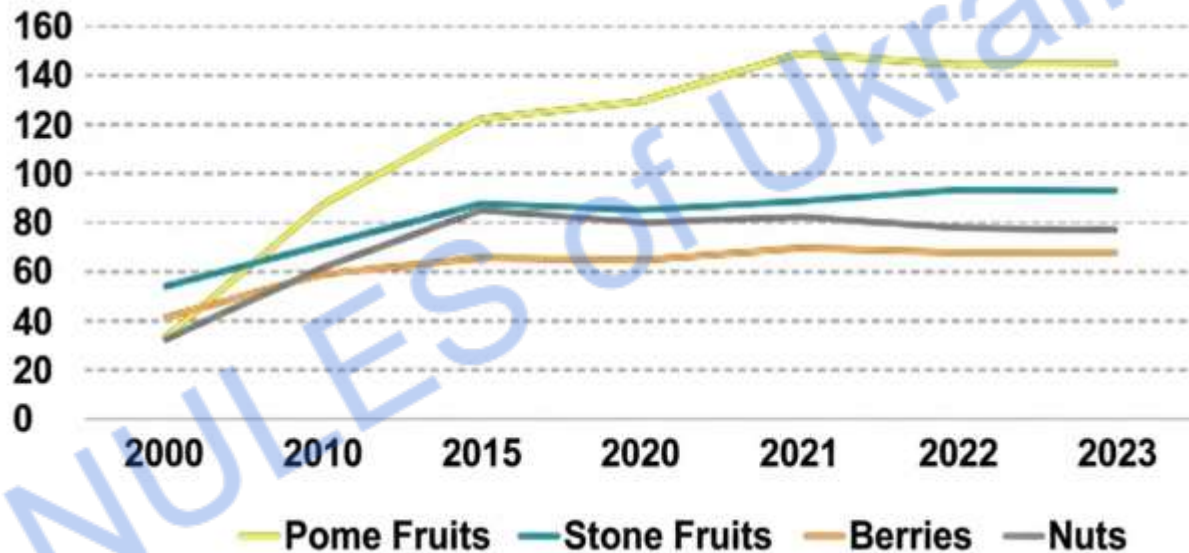
Source: Compiled from data UN Comtrade data base, <https://comtradeplus.un.org/TradeFlowtrade>

**Fig. 9. Area under fruit and berry crops of bearing age, thousand hectares**



Source: Compiled using data from the State Statistics Service of Ukraine

**Fig. 10. Yield trends for fruit and berry crops, tonnes per hectare**



Source: Compiled using data from the State Statistics Service of Ukraine

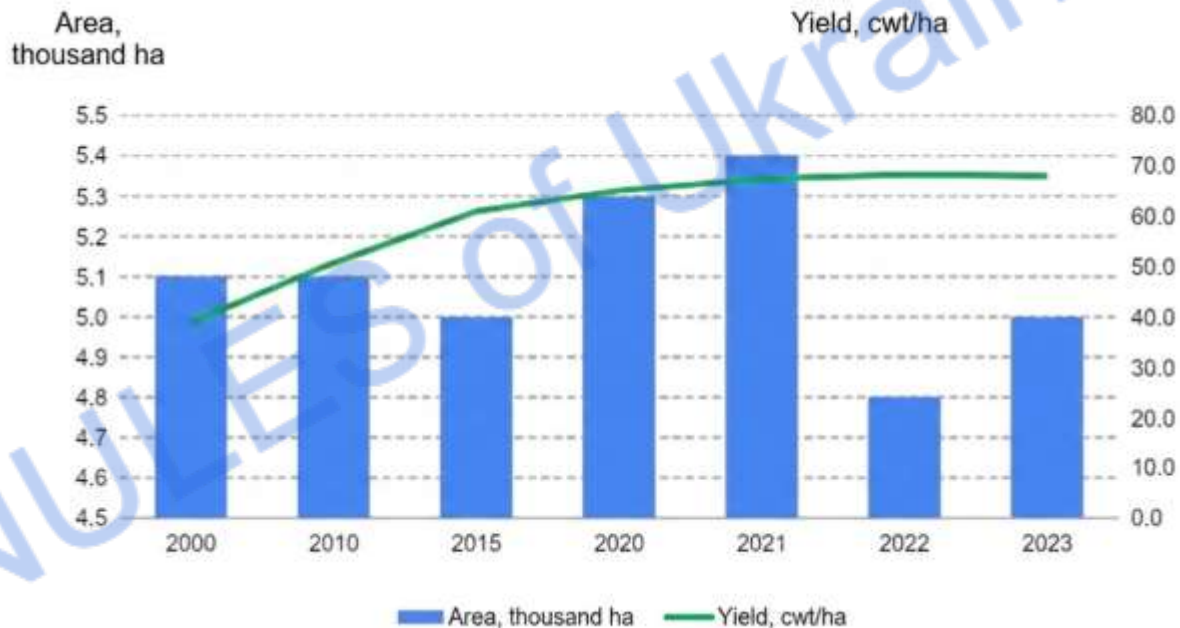
**Table 1. Trends in the area under cultivation, yield and production of fruit and**

Indicators	2000	2010	2015	2020	2021	2022	2023
Area under fruit and berry crops on farms of all categories, thousand hectares including:	378	223.2	206	191	190.5	171.2	167
- proportion of enterprises, %	64.4	33.6	28.8	22.8	22.4	19.2	19.9
- proportion of private households, %	35.6	66.4	71.7	77.2	77.6	80.8	80.1
Production of fruit and berry crops, thousand tonnes including:	1452.6	1746.5	2152.8	2023.9	2235.1	1994.8	1995.9
- proportion of enterprises, %	18.2	16.4	19.1	16.8	20.8	17.7	19.8
- proportion of private households, %	81.8	83.6	80.9	83.2	79.2	82.3	80.2
Yields on farms of all categories, tonnes per hectare	38.4	78.2	104.5	105.6	117.3	116.1	119
Yields on private farms, tonnes per hectare	88.3	98.5	117.8	114	119.8	118.7	121

## Table 2. Activities of fruit and berry growers – large, medium, small and

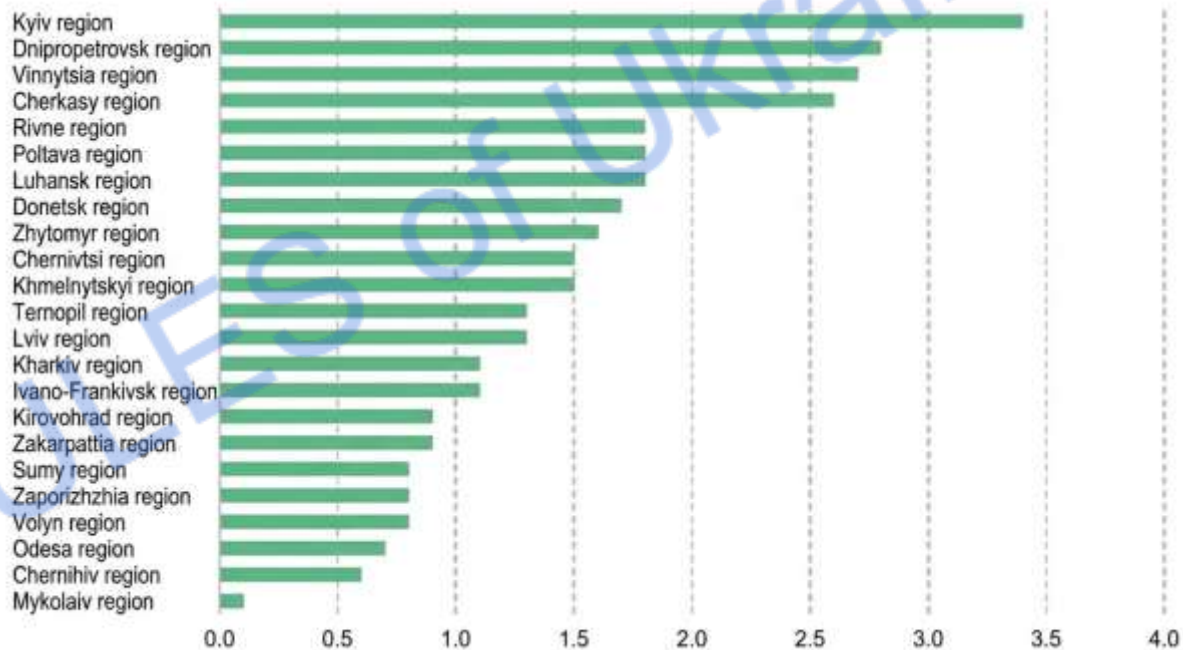
Indicators	2015	2020	2021	2022
The production of pome and stone fruits				
Number of enterprises, units:				
large	-	-	-	-
average	33	27	27	17
small	812	885	827	608
- of which micro-enterprises	751	824	770	552
Operating profit margin of enterprises, %:				
large	-	-	-	-
average	49.6	8.5	-1.1	-17.2
small	28.4	13.9	23.0	0.9
- of which micro-enterprises	15.6	19.1	17.8	4.6
The cultivation of berries, nuts, and other fruit trees and shrubs				
Кількість підприємств, одиниць:				
large	-	-	-	-
average	4	6	9	11
small	746	921	912	781
- of which micro-enterprises	729	893	879	753
Operating profit margin of enterprises, %:				
large	-	-	-	-
average	-	45.3	14.2	21.8
small	-	16.6	27.4	8.5
- of which micro-enterprises	28.7	12.8	16.6	13.4

## Fig. 11. Trends in the area of raspberry plantations of bearing age and their yield

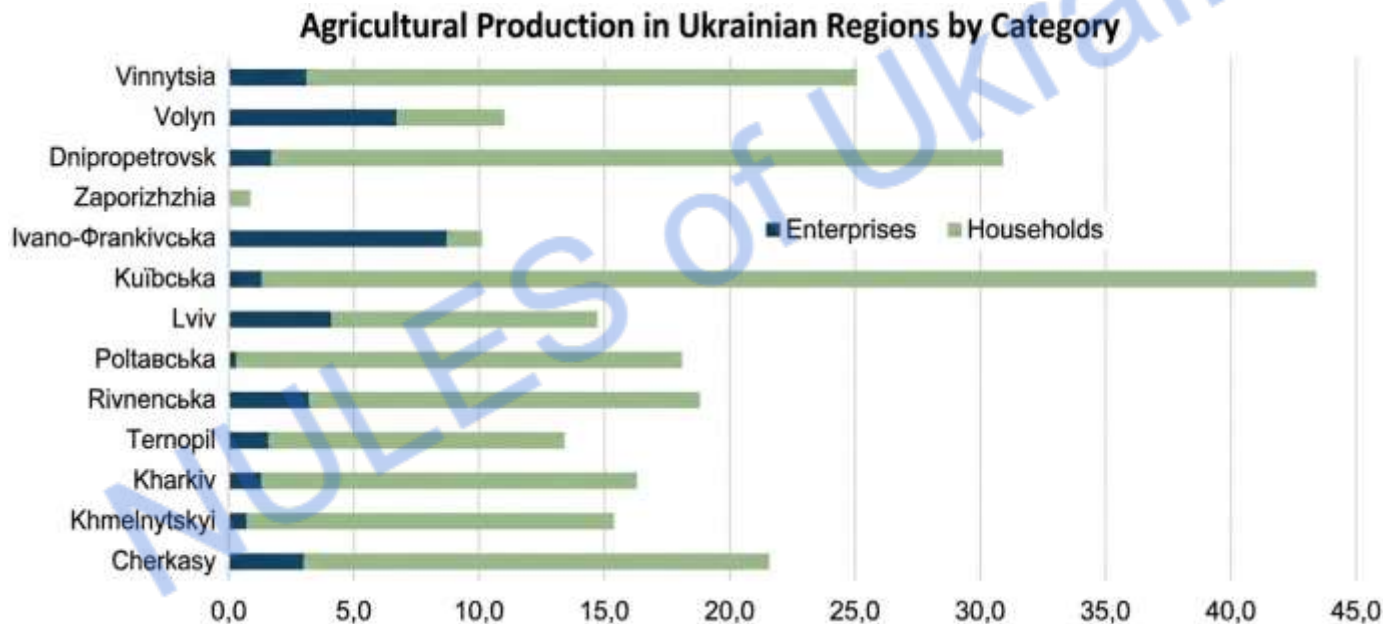


Source: Compiled using data from the State Statistics Service of Ukraine

**Fig. 12. Raspberry production by region in Ukraine in 2022,  
thousand tonnes**



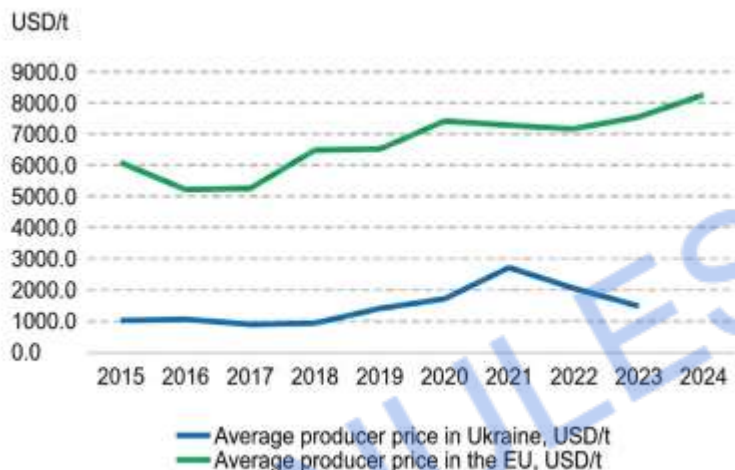
**Fig. 13. Raspberry production by enterprise and private household, by region of Ukraine in 2023, thousand tonnes**



## Table 3. Trends in raspberry exports (HS 081010) from Ukraine in the period 2022-2024

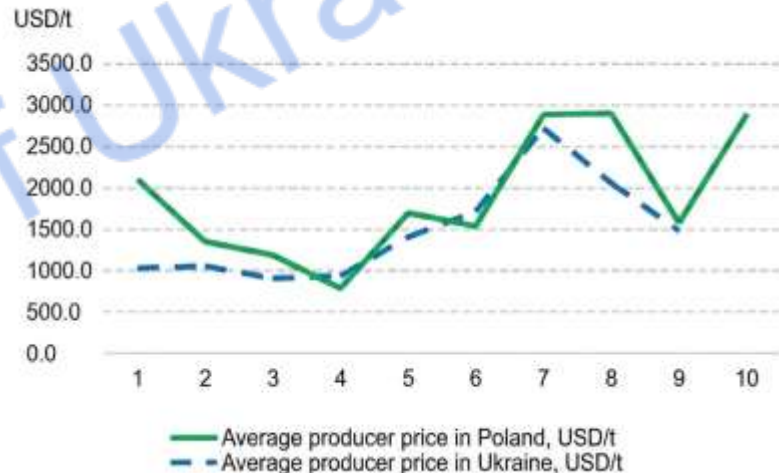
Product	Exports from Ukraine, thousand tonnes	Value of exports from Ukraine, in thousands of US dollars	Exports from Ukraine to the EU, in thousands of tonnes	2022		Top 3 importing countries	Top 3 importers among EU countries
				The EU's share of Ukraine's exports, %	Ukraine's share of imports into the EU, %		
Fresh raspberries (HS 08102010)	0.47	1160.63	0.41	100.00	0.84	Poland, the Netherlands, Belgium	Poland, the Netherlands, Belgium
Frozen raspberries (HS 0811203100)	40.27	102891.1	38.24	99.64	28.55	Poland, Germany, the Czech Republic	Poland, Germany, the Czech Republic
<b>2023</b>							
Fresh raspberries (HS 08102010)	0.56	585.56	0.38	100.00	0.89	Poland, the Netherlands	Poland, the Netherlands
Frozen raspberries (HS 0811203100)	49.52	71870.99	45.75	97.69	33.07	Poland, Germany, the Czech Republic	Poland, Germany, the Czech Republic
<b>2024</b>							
Fresh raspberries (HS 08102010)	0.51	1014.71	0.44	99.90	0.84	Poland, the Netherlands	Poland, the Netherlands
Frozen raspberries (HS 0811203100)	61.3	115421.4	59.51	98.66	34.6	Poland, Germany, the Czech Republic	Poland, Germany, the Czech Republic

**Fig. 14. Trends in average annual raspberry prices in Ukraine and the EU, US dollars/t**



Source: FAOSTAT,  
<https://www.fao.org/faostat/en/#data/PP>

**Fig. 15. Trends in average annual raspberry prices in Ukraine and Poland, US dollars/t**



Source: FAOSTAT,  
<https://www.fao.org/faostat/en/#data/PP>

# PROGRESS

Promoting Green Deal Readiness in the Eastern Partnership Countries



## Profitability of raspberry production in 2025

#	Indicators	Values	Share of costs in total cost, %
1	Yield, tonnes per hectare	8	
2	Seedlings (6–7,000 per hectare), thousand hryvnias	70	15
3	Fertilisers and plant protection products, thousand UAH/ha	40	9
4	Irrigation and electricity, thousand UAH/ha	30	7
5	Fuel and soil preparation, thousand UAH/ha	12	3
6	Crop maintenance and shaping (weeding, staking, pruning, mulching), thousand UAH/ha	20	4
7	Harvesting (wages for harvesters), thousand UAH/ha	200	44
8	Depreciation of equipment (including irrigation system and trellis), thousand UAH/ha	30	7
9	Packaging and logistics, thousand UAH/ha	30	7
10	Administrative costs, thousand UAH/ha	25	5
11	<b>Production cost, thousand UAH/ha</b>	<b>457</b>	<b>100</b>
12	<b>Cost price, UAH/kg (including investment)</b>	<b>57</b>	<b>X</b>



Key figures	Wholesale	Retail
Selling price, UAH/kg	150.0	220.0
Profit, UAH/kg	92.9	162.9
Profitability, %	163	285

## Fig. 16. The raspberry value chain

### Option 1 – Wholesale

**Raspberries  
Cost price-  
57 UAH/kg**

**Manufacturer's selling price:  
101 UAH/kg (Transport  
costs – 10% of production  
cost; manufacturer's profit  
(on sales) – 60%)**

**Manufacturer  
's added  
value:  $\Delta = 44$   
UAH/kg**

**Trans  
port  
cost –  
10%  
of the  
refere  
nce  
price**

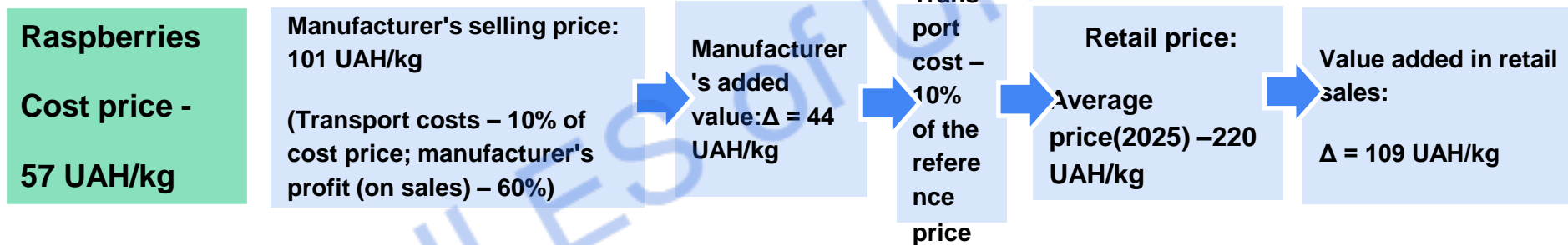
**Wholesale:  
Average  
price(2025) –150  
UAH/kg**

**Added value of the  
wholesale  
intermediary:  
 $\Delta = 60$  UAH/kg**

Source: compiled by O.G. Makarchuk, National University of Life and Environmental Sciences of Ukraine, 2026

## Fig. 17 The raspberry value chain

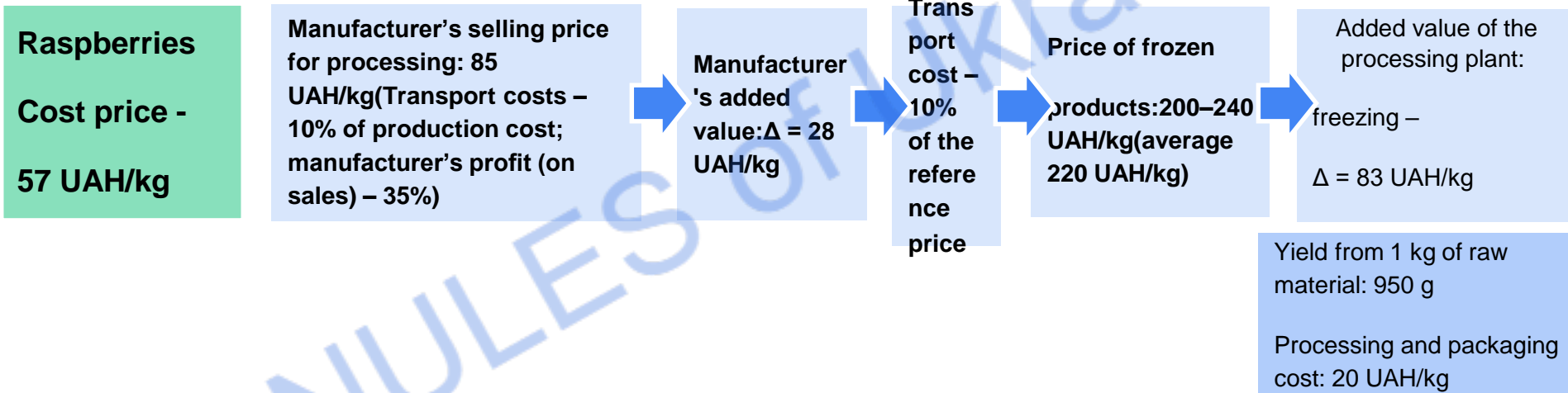
### Option II – Retail sales



Source: compiled by O.G. Makarchuk, National University of Life  
and Environmental Sciences of Ukraine, 2026

**Fig. 18. The raspberry value chain**

**Option III – Processing (freezing)**

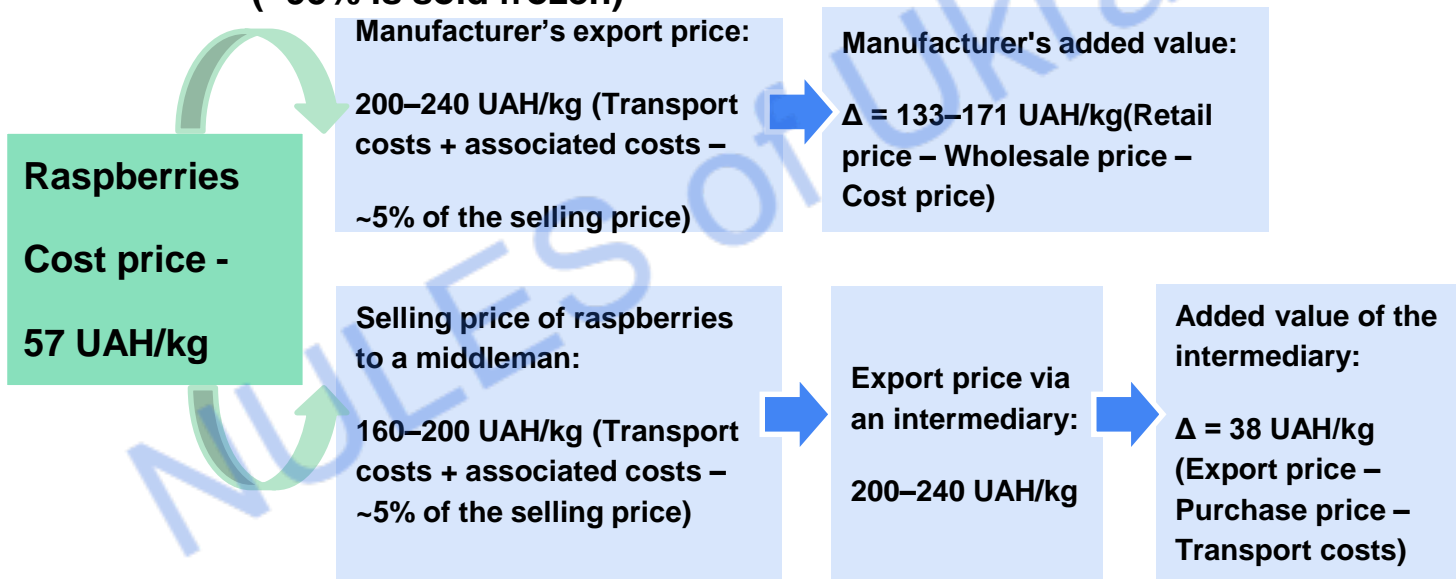


Source: compiled by O.G. Makarchuk and O.V. Zavadskaya, National University of Life and Environmental Sciences of Ukraine, 2026

## Fig. 19. The raspberry value chain

### Option IV – Export of frozen raspberries

(~95% is sold frozen)



## State support for horticultural production

### 1. Government grants for horticulture, soft fruit growing, viticulture and greenhouse farming

#### **Grant programme from the Ministry of Economy, Environment and Agriculture of Ukraine.**

From 2 February 2026, applications for grants were accepted via the 'Dія' portal for the development of horticulture, berry growing, viticulture and greenhouse farming. Programme budget: for 2026, the state budget has allocated US dollars 465 million (~UAH 14 billion) for grant support for orchards, berry farms, vineyards and greenhouses.

Grant amounts Orchards: up to UAH 10 million per project (maximum UAH 400,000 per hectare) for planting and establishing orchards covering an area of 1–25 hectares

#### **Greenhouses:**

- 0.4–0.6 ha – up to 2 million UAH
- 0.8–1.2 ha – up to 3.5 million UAH
- 1.6–2.4 ha – up to 7 million UAH



#### Eligibility criteria for the grant

- The project must be carried out on land for which ownership or a right of use has been confirmed for a period of at least seven years;
- For projects in frontline and de-occupied areas, compensation may cover up to 80% of the project cost.

## State support for horticultural production

2. Total state support for the agricultural sector in 2026 The Law "On the State Budget of Ukraine for 2026" provides for:

UAH 13.1–14.1 billion in total state support for the agricultural sector. These funds are allocated to:

- financial support for agricultural producers (subsidies, compensation);
- crop insurance;
- restoration of irrigation systems;
- other programmes that may also indirectly support horticulture (for example, preferential lending or compensation for certain types of agricultural projects).

### 3. Support for storage infrastructure

The Cabinet of Ministers of Ukraine has approved a decision to introduce grants for the construction of vegetable and fruit storage facilities (Resolution adopted on 21 January 2026). *Key terms of the programme:*

- grant – up to 30% of construction costs, but not exceeding UAH 20 million;
- mandatory co-financing by the recipient;
- support for new facilities with a capacity of 3,000 tonnes or more
- project implementation period – 6–18 months
- special conditions for frontline areas: the state may cover up to 50% of construction costs;



the incentives apply to enterprises operating or owning land in areas of potential or active hostilities, in accordance with the list provided by the Ministry of Development

## State support for horticultural production

### 3. An orchard grant is a non-repayable financial aid for:

- establishing fruit orchards;
- berry fields (strawberries, raspberries, blueberries, etc.);
- vineyards.

The grant is awarded **on condition that jobs are created** and the funds are used for their intended purpose. **Grant amount:** up to several million hryvnias (depending on the crop and area).

**Area:** usually from 1–2 hectares (berry fields) to larger areas for orchards. **Co-financing:** the applicant covers part of the costs (e.g. 30–50%) themselves. **Grant funds may be used for:**

- planting material;
- irrigation systems;
- nets, supports;
- maintenance equipment;
- infrastructure development (partially).

Mandatory conditions are:

- owning the land or holding it under a long-term lease;
- submitting a business plan;
- creating jobs.



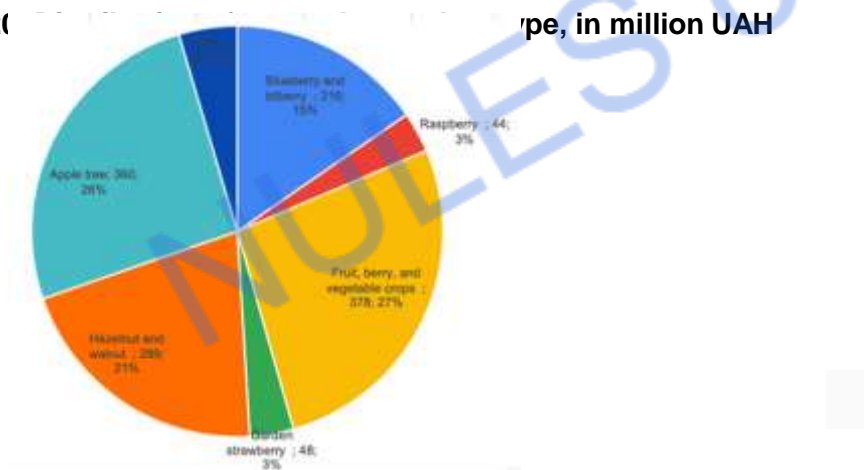
## State support for horticultural production

4. The “eRobota” programme, launched on 1 July 2022, aims to support small and medium-sized businesses across the country. The programme’s main objective is job creation, and one of its key components — “Sviy Sad” (Own Orchard) — is specifically targeted at agricultural producers and farmers planning to establish or expand plantations of fruit, berry crops, grapes and nuts.

Under this grant programme, beneficiaries can receive funding ranging from 140,000 UAH (approximately US\$3,800) to 400,000 UAH (approximately US\$10,800) per hectare, but not more than 10,000,000 UAH (approximately US\$270,000) in total per beneficiary.

Grants are provided for up to 70% of the total project cost, provided that the beneficiary covers the remaining 30% with their own or external funds (e.g. through loans).

Fig. 20



## CONCLUSIONS

- ❑ Ukraine is one of the world's leading exporters of frozen raspberries, competing with countries such as Serbia and Poland
- ❑ Over 90–95% of the raspberries produced are sent for processing (IQF freezing)
- ❑ The main export market is the EU countries: Germany, France, Italy and the Netherlands
- ❑ Production is concentrated mainly in the western and central regions
- ❑ The market is export-oriented and highly dependent on global price trends

### *Key issues*

- ❖ Price volatility in the global frozen raspberry market
- ❖ Reliance on intermediaries and processors (farmers often lack direct access to export markets)
- ❖ Labour shortages and rising labour costs
- ❖ Logistical risks
- ❖ Insufficient levels of value-added processing (focus mainly on raw materials)
- ❖ Competition from Serbia and Poland (lower production costs, stable contracts)

### *Prospects for development*

- ❖ Growing demand in the EU for organic and certified produce (GlobalG.A.P., HACCP, BRC).
- ❖ Development of value-added processing (purees, concentrates, freeze-dried raspberries, HoReCa segment).
- ❖ Expansion of export markets (USA, Canada, the Middle East).
- ❖ Investment in mechanised harvesting and modern varieties of everbearing raspberries.
- ❖ Cooperation between farmers and the creation of

# PROGRESS

Promoting Green Deal Readiness in  
the Eastern Partnership Countries



**THANK YOU FOR YOUR ATTENTION!**

NULS of Ukraine