



Garden strawberry market analysis

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Types of markets and the position of the strawberry market

By economic
purpose

Food market

By product type

The market for
agricultural (fruit and
vegetable) produce

In terms of
competition

Perfect (pure)
competition

(many producers,
differentiation by
variety, quality and
origin)

In terms of duration
of operation

Seasonal market

(partially offset by
greenhouse
production and
imports)

By geographical
coverage

The domestic and
global markets

By sales channel

Wholesale and
retail, contract
(strawberries for
processing or
export)



Strawberry market segments

By product form

Fresh strawberries the dominant segment; short shelf life; focused on local and national markets.

Frozen strawberries used in processing and for export; lower price compared to fresh strawberries; stable industrial demand.

Processed strawberries purees, jams, concentrates; industrial use; less sensitive to appearance.

By consumer type

B2C

households;
retail chains, markets.

B2B

processing companies;
exporters;

HoReCa.

By production method

Open-field cultivation

Protected cultivation
(tunnels, greenhouses)

Organic strawberries
(niche premium segment)

By sales method

Spot

Contract

Spot-contract
(predominant model)



Market trends

The dominance of the fresh produce segment

the main demand is for fresh produce; high seasonality; dependence on weather conditions.

Extension of the supply season

extensive use of tunnels and greenhouses; early and late strawberries command a premium price.

A limited but growing focus on exports

Exporting fresh strawberries is challenging due to logistical issues; exports of frozen products are on the rise.

Price volatility

sharp price fluctuations during the peak season; the impact of weather-related risks; excess supply over a short period.

The development of the organic and premium segments

demand for organic strawberries;
high added value;
limited supply.

A gradual increase in contractual relationships

contracts with retailers and processors; more stable prices; strict quality requirements.

Challenges facing the industry

1. Seasonality and a limited harvesting period.

Strawberries have a short fruiting season, which limits the volume of fresh produce available for sale and export. Precise coordination of harvesting and supply is required to prevent the produce from spoiling.

2. Logistics and cold chain challenges

Strawberries spoil quickly, so an effective cold chain during transport is critical. High storage and transport costs.

3. Climate and weather risks

Frost, drought or heavy rain can significantly affect the harvest. Climate change increases the unpredictability of production.

4. High competition in international markets

Poland, Spain and the Netherlands have well-developed production and export sectors, offering high-quality produce at competitive prices. Ukrainian producers often face challenges regarding quality standards and certification for the EU.

5. Product certification and quality requirements

The need for phytosanitary certificates, HACCP and other international standards for export. Failure to comply with standards may close off access to lucrative markets

6. Labour-intensive nature and shortage of seasonal labour

Strawberry harvesting requires manual labour, which makes production costly.

Seasonal workers are often hard to find or expensive.

7. Price volatility

The market is heavily dependent on seasonal supply and demand.

Prices can fall sharply during periods of oversupply.

8. Limited technological modernisation

Insufficient adoption of modern cultivation, irrigation and plant protection technologies.

Low share of organic production for EU markets.

9. Access to finance and investment

Significant investment is required to modernise greenhouses, storage facilities and logistics.

Small farmers often have limited access to loans or grants.

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

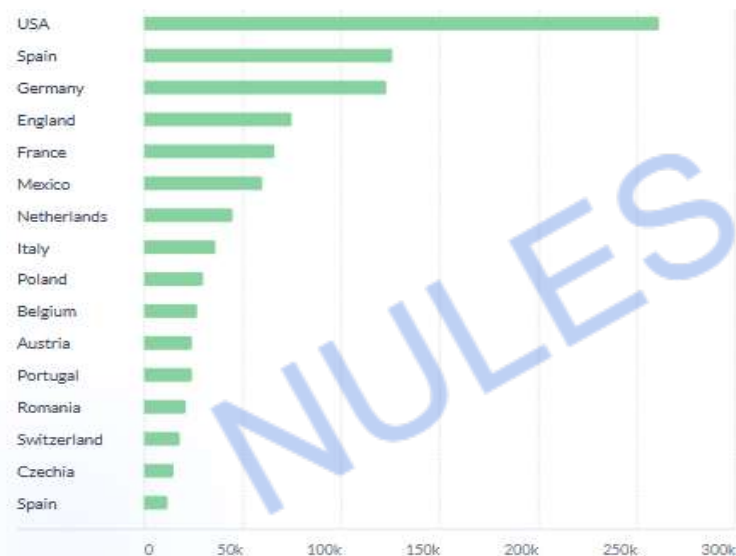
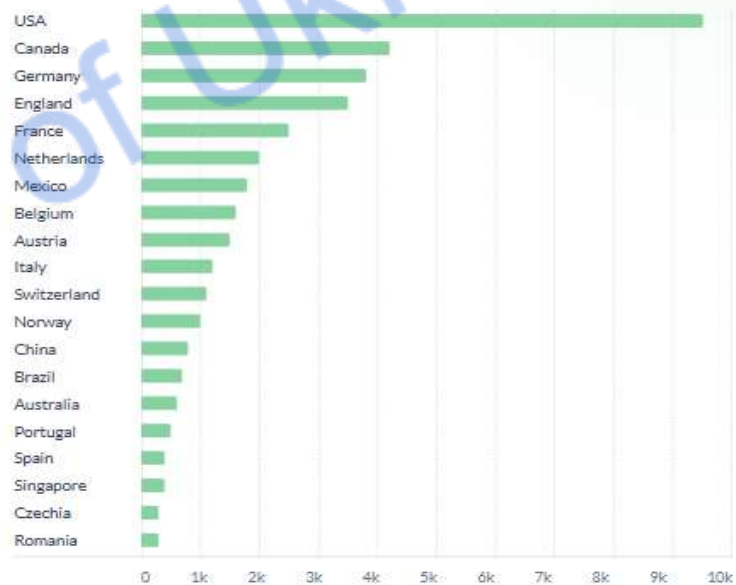
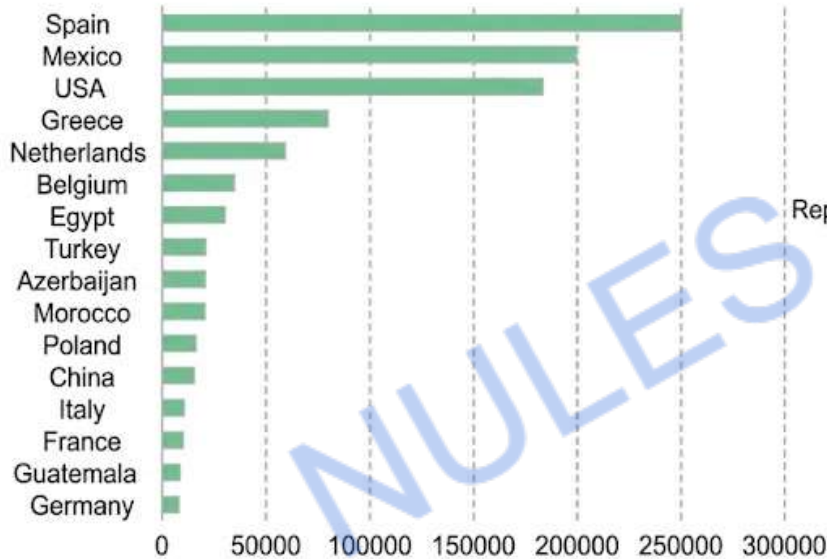


Fig. 2. Value of fresh strawberry imports by the world's major importing countries in 2024, thousands US



**Fig. 3. Major global exporters of fresh strawberries
in 2024. tonnes**



**Fig. 4. Value of fresh strawberry exports by
the world's leading exporting countries in
2024, thousands US dollars**



Fig. 5. Leading global exporters of frozen strawberries in 2024, tonnes

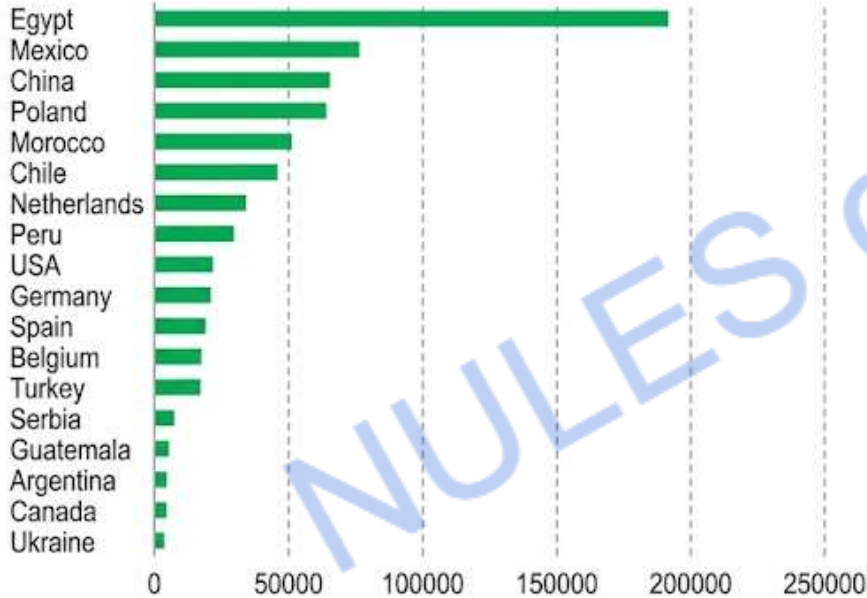
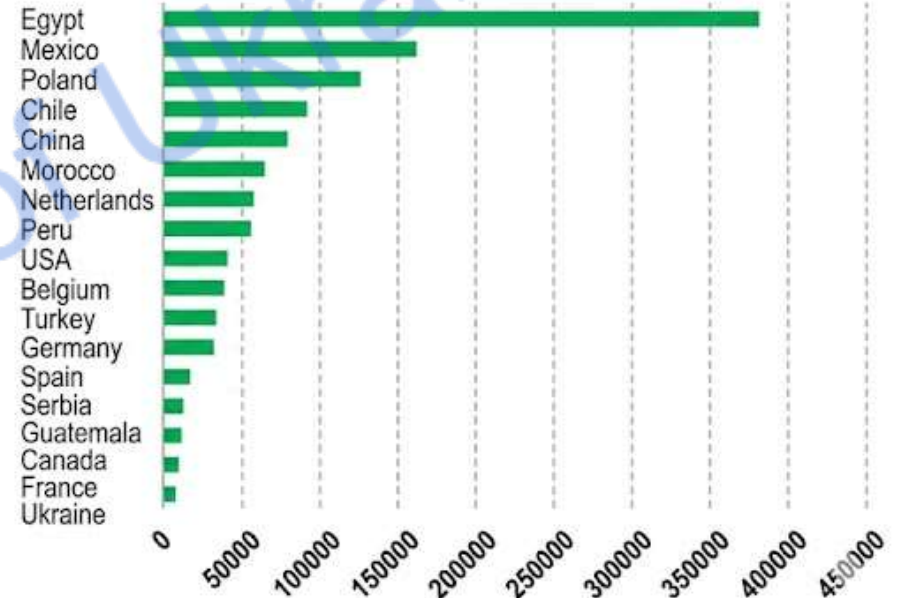


Fig. 6. Value of frozen strawberry exports by the world's leading exporting countries in 2024, thousands US dollars



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

Fig. 7. Main importers of frozen strawberries worldwide in 2024, tonnes

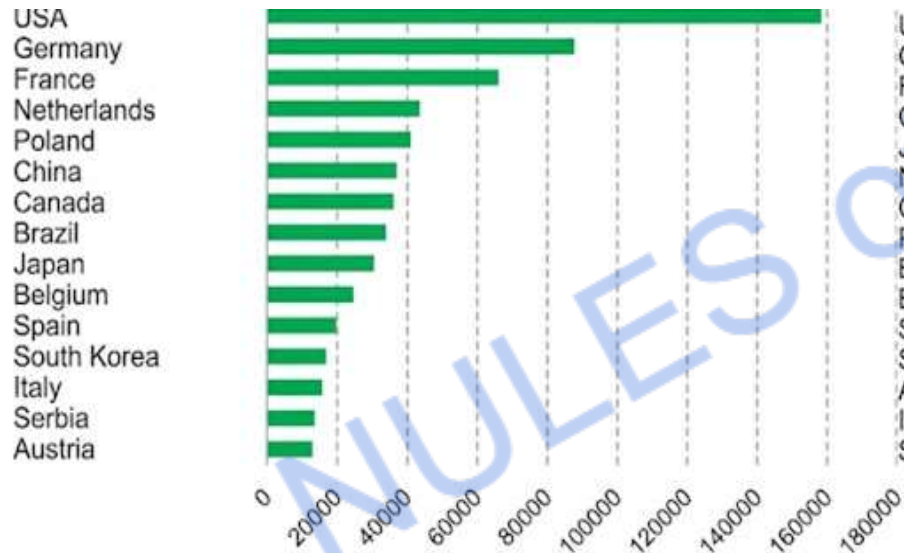
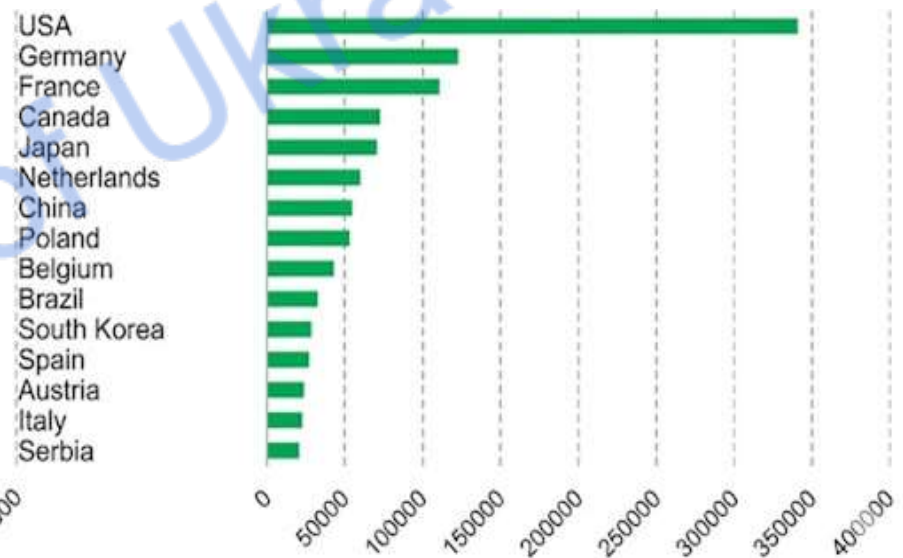
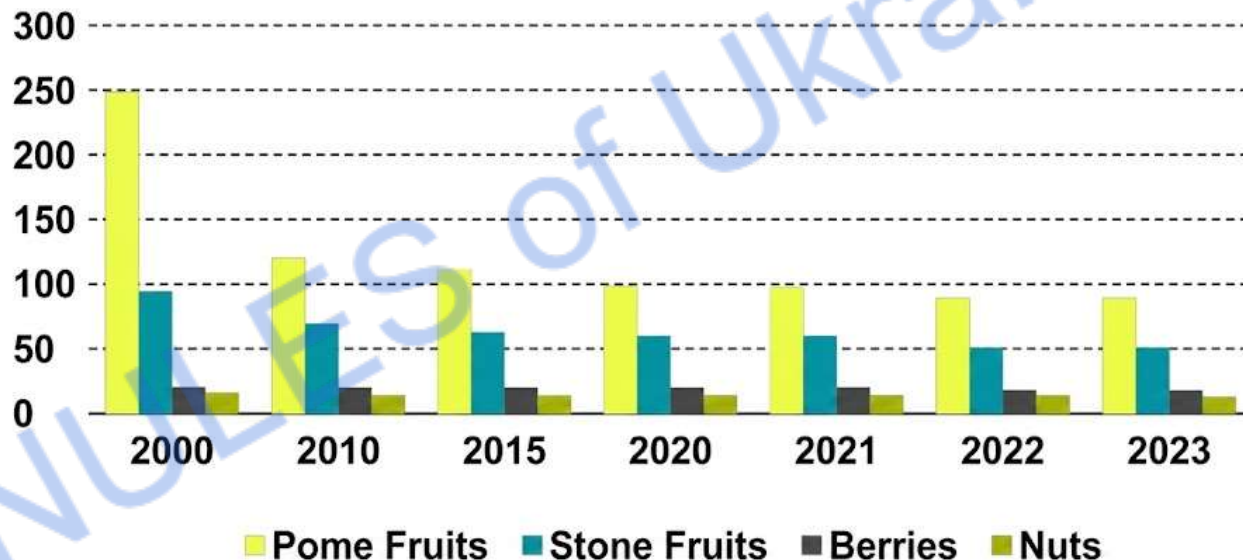


Fig. 8. Value of frozen strawberry imports by the world's main importing countries in 2024, thousands US dollars



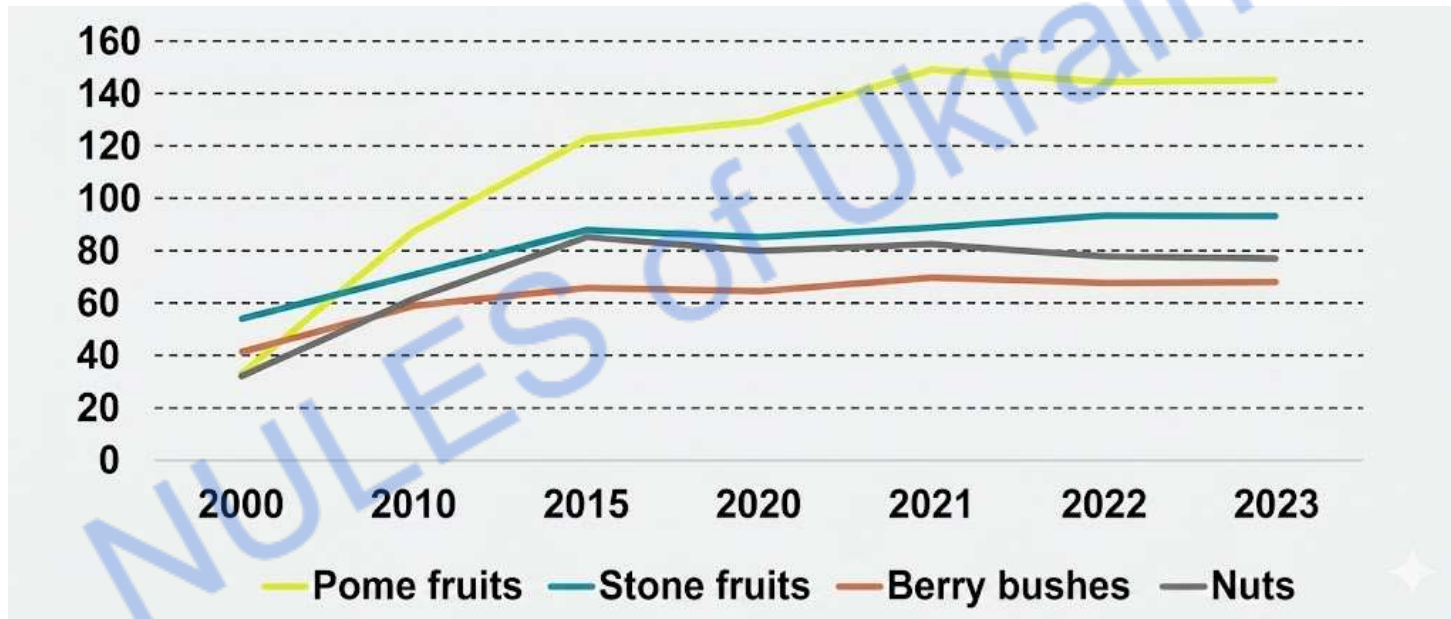
Source: Compiled from data UN Comtrade data base, <https://comtradeplus.un.org/TradeFlowtrade>

**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, cwt/ha



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

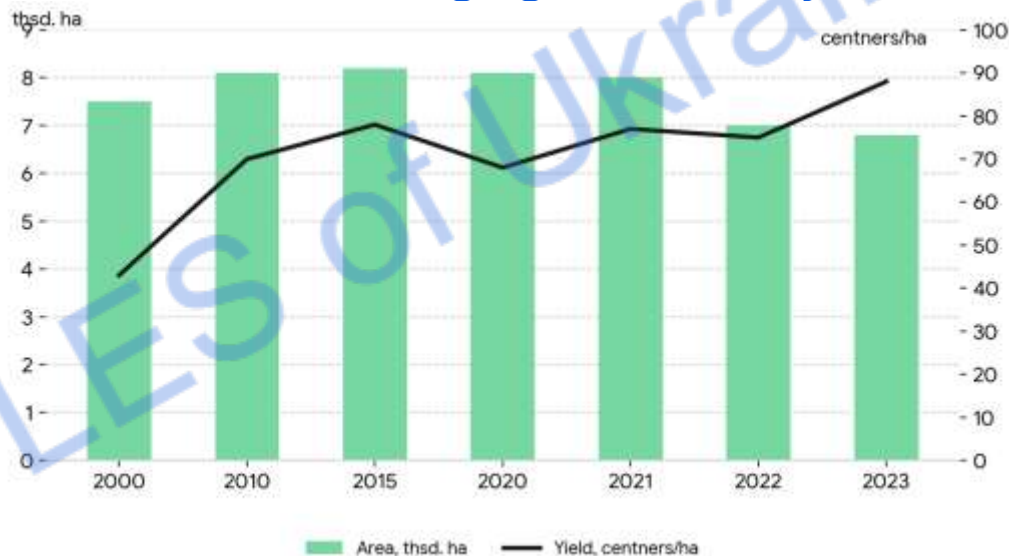
Table 1. Trends in the area under cultivation, yield and production of fruit and berry crops by farm category in Ukraine

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				
Number of enterprises, units:				
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 under strawberry plantations of bearing age and their yield



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

Fig. 12. Strawberry production by region in Ukraine in 2023, in thousands of tonnes

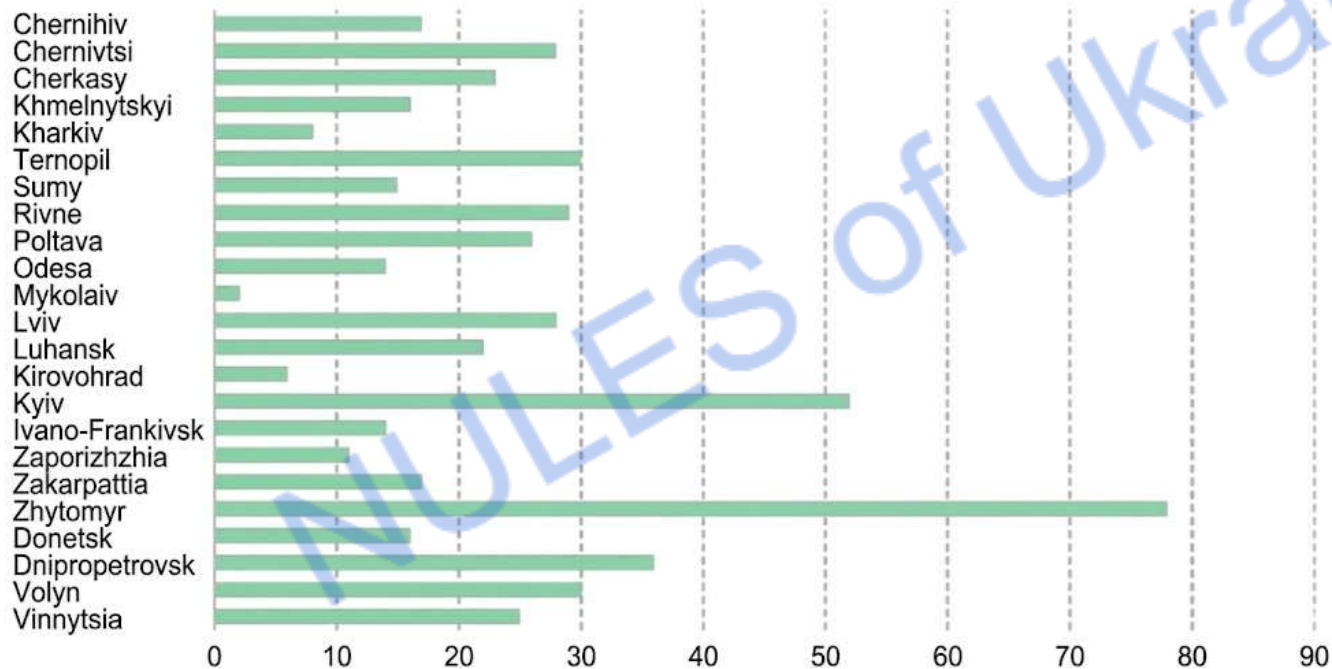


Fig. 13. Strawberry production by enterprise and private household by region of Ukraine in 2023, thousands tonnes

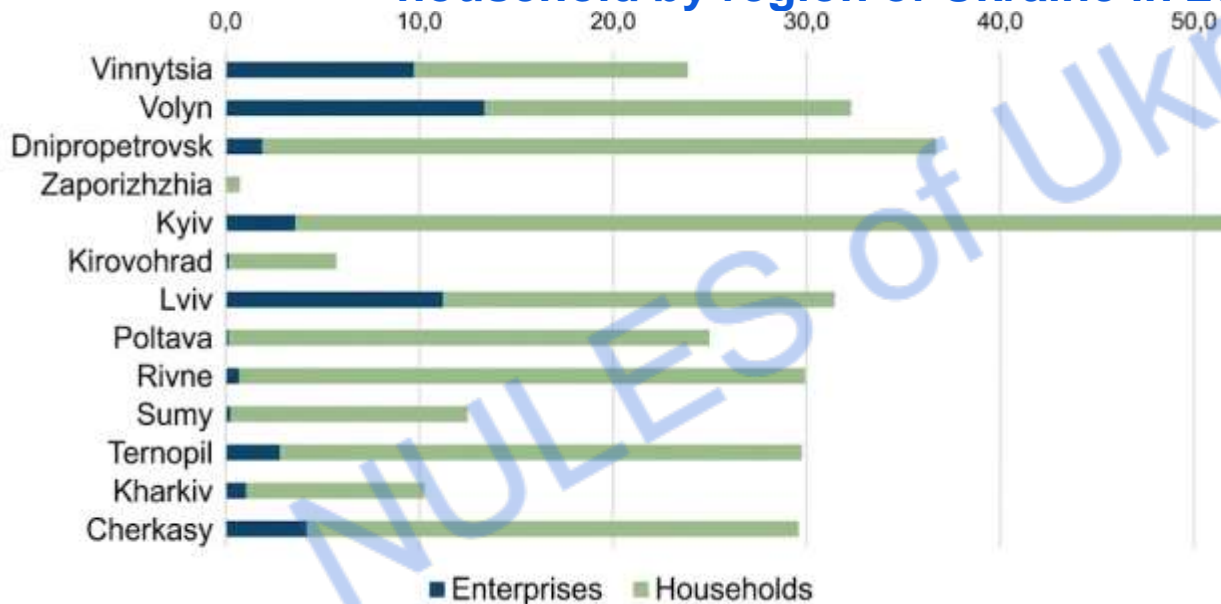
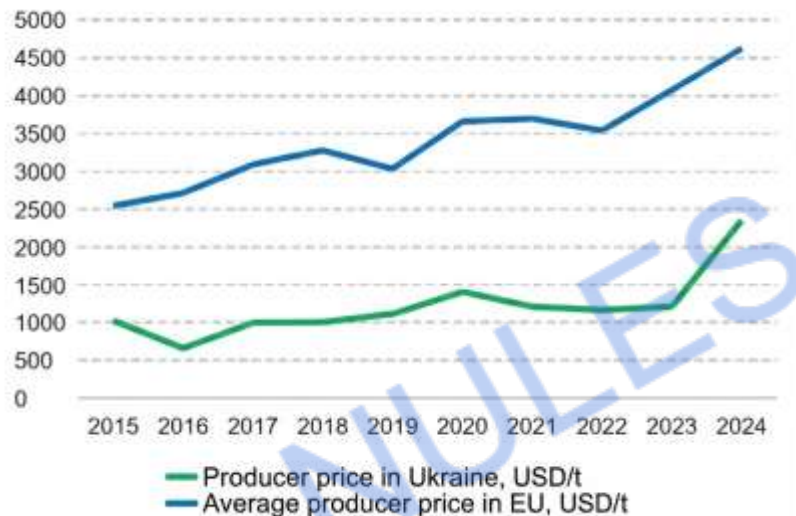


Table 3. Trends in strawberry exports from Ukraine for 2022–2024

Years	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	The EU's share of Ukraine's exports, %	Ukraine's share of imports into the EU, %	Top 3 importing countries	Top 3 importers among EU countries
2022							
Fresh strawberries (HS 081010)	0.21	434.33	0.21	99.9	1.11	Poland	Poland
Frozen strawberries (081110)	4.59	9083.3	4.53	98.7	2.18	Poland, Germany, the Czech Republic	Poland, Germany, the Czech Republic
2023							
Fresh strawberries (HS 081010)	0.13	144.23	0.1	76.7	0.43	Poland, Moldova	Poland
Frozen strawberries (081110)	3.12	6024.7	2.93	94.0	1.37	Poland, Austria, the Czech Republic	Poland, Austria, the Czech Republic
2024							
Fresh strawberries (HS 081010)	0.19	233.27	0.17	90	0.84	Poland, Moldova, Romania	Poland, Romania
Frozen strawberries (081110)						Poland, the Czech Republic	Poland, the Czech Republic

Fig. 14. Trends in average annual strawberry prices in Ukraine and the EU, US dollar/tonne



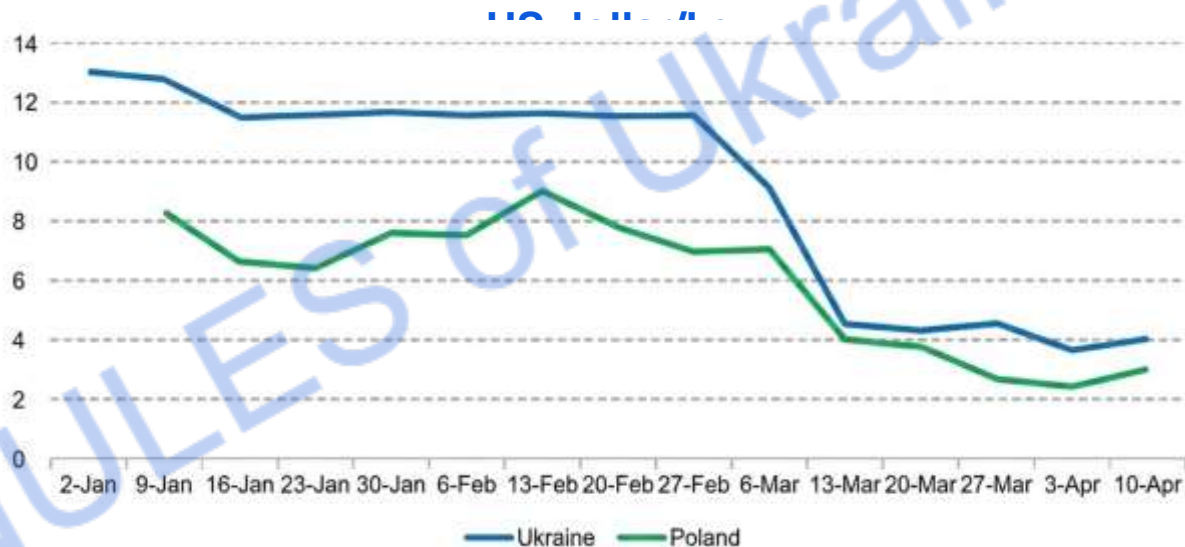
Source: Compiled from data FAOSTAT,
<https://www.fao.org/faostat/en/#data/PP>

Fig. 15. Trends in average annual strawberry prices in Ukraine and Poland, US dollar/t



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

Fig. 16. Weekly price trends for strawberries in Ukraine and Poland,



Source: Compiled from data <https://east-fruit.com/uk/vybir-produktovoyi-hrupy/tsiny/?group=strawberries&lang=uk>

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Table 4. Production costs for strawberries in 2025, by cultivation method

№п/п	Open ground (field)	Costs, thousand UAH/ha	Protected cultivation (polytunnels/greenhouses)	Costs, thousand UAH/ha
1	Planting material	125	Depreciation of greenhouses / polytunnels	700
2	Soil preparation	60	Planting stock (frigo)	400
3	Fertilisers and plant protection products	53	Substrate/containers	180
4	Drip irrigation	75	Fertilisers and plant protection products	34
5	Mulching with plastic sheeting (including installation)	60	Heating/electricity	200
6	Remuneration (collection)	280	Remuneration	750
7	Other expenses	180	Other expenses	150
	Total expenditure	833	Total expenditure	2414
	Average yield	14 t/ha	Average yield	30 t/ha
	Cost price per tonne, thousand UAH	59.5	Cost price per tonne, thousand UAH	80.47
	Cost price per 1 kg,			

Standard production conditions

Open ground (field)	Protected cultivation (polytunnels/greenhouses)
drip irrigation	early work
mulching with plastic sheeting	frigo seedlings
hand-picked	heating is available
without heating	advanced technology

Conclusions: Open-field cultivation is more cost-effective for processing and the mass market. Protected cultivation is suitable for early produce, the premium segment and exports, despite the higher production

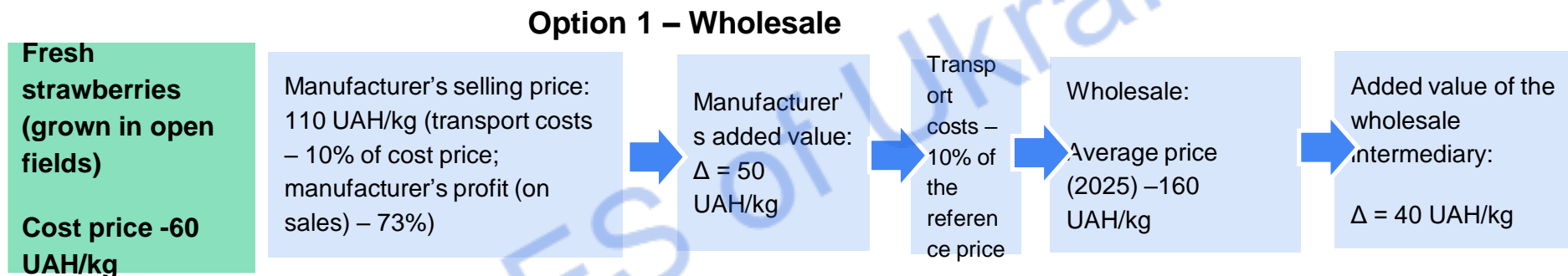


Table 5. Profitability of strawberry production in 2025

Key figures	Wholesale	Retail
Retail price (open ground), UAH/kg	110.00	160.00
Selling price (greenhouse-grown), UAH/kg	160.00	220.00
Profit (open ground), UAH/kg	50.50	100.50
Profit (protected cultivation), UAH/kg	79.53	139.53
Profitability (open field), %	84.87	124.90
Profitability (protected cultivation), %	133.67	155.22

Source: own calculations based on expert assessments by lecturers at the Prof. V.L. Symyrenko Department of Horticulture, National University of Life and Environmental Sciences of Ukraine, 2026

Fig. 17. Value chain for strawberries (open-field cultivation)



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

Fig. 18. Value chain for strawberries (open-field cultivation)

Option II – Retail sales

**Fresh strawberries
(grown in open
fields)**

**Cost price -60
UAH/kg**

Manufacturer's selling price:
110 UAH/kg (transport costs
– 10% of production cost;
manufacturer's profit (on
sales) – 73%)

Manufacturer's
added
value: $\Delta = 50$
UAH/kg

Transp
ort
costs –
10% of
the
total

Retail price:
Average price
(2025) – 220
UAH/kg

Value added in
retail sales:
 $\Delta = 100$ UAH/kg

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

Fig. 19. Value chain for strawberries (open-field cultivation)

Option III – Rewrite

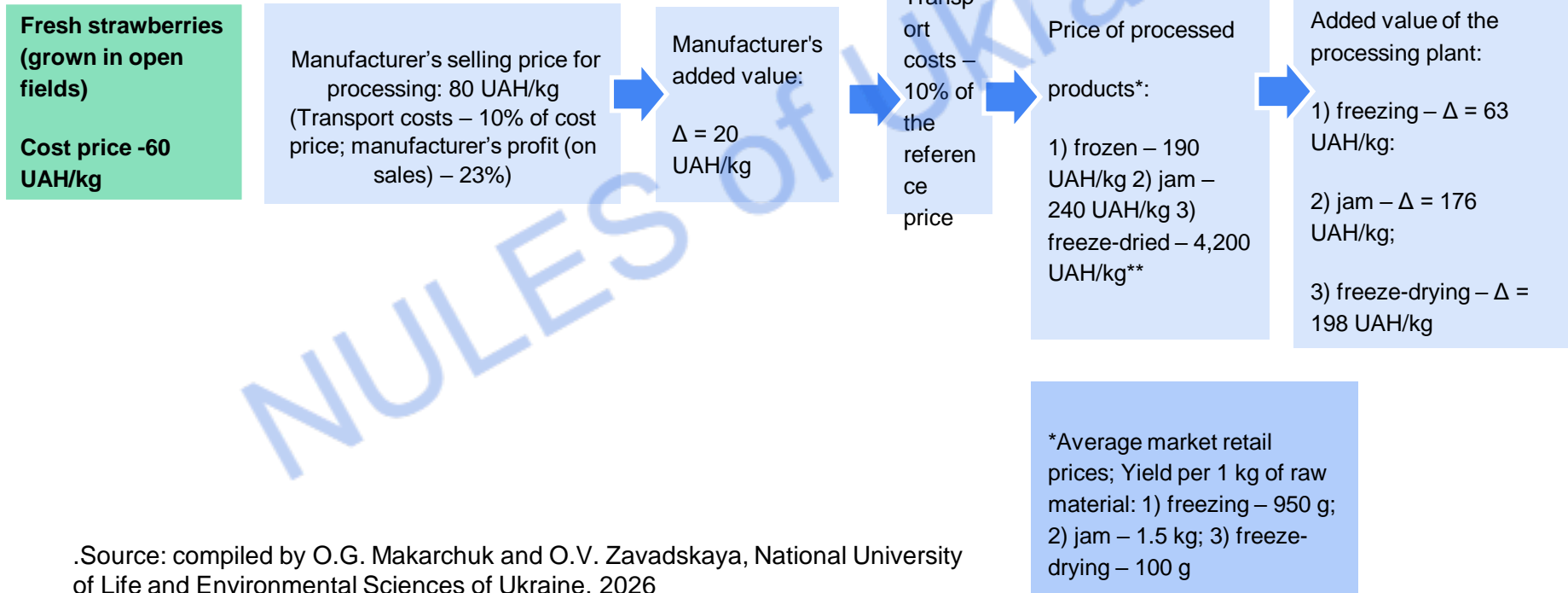
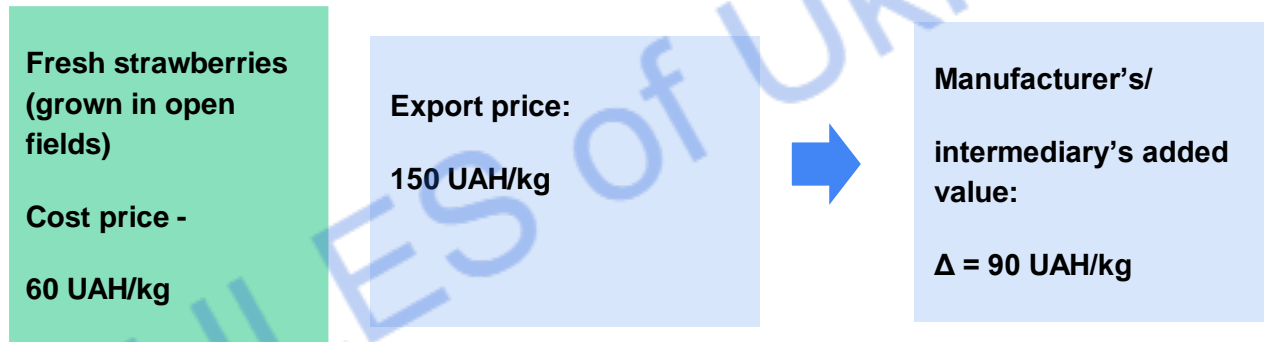


Fig. 20. Value chain for strawberries (open-field cultivation)

Option IV – Export



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

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 'Diia' portal for the development of horticulture, berry growing, viticulture and greenhouse farming.

Programme budget: The 2026 state budget allocates US\$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 territories, compensation may cover up to 80% of the project cost.

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) up 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.

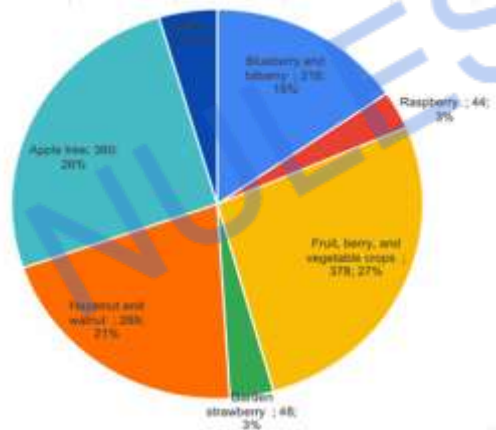
State support for horticultural production

4. The 'eRobota' programme, launched on 1 July 2022, is designed 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, recipients can receive funding ranging from 140,000 UAH (approximately US dollars 3,800) to 400,000 UAH (approximately US dollars 10,800) per hectare, but not exceeding 10,000,000 UAH (approximately US dollars 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. 21. Distribution of grants by product type, in millions of UAH



CONCLUSIONS

- ❖ The strawberry market in Ukraine is predominantly domestic, with a high proportion of small-scale producers
- ❖ Significant seasonality and price fluctuations
- ❖ Exports are limited, but there is potential—particularly in the frozen food sector.

Key issues:

- a lack of modern logistics and refrigeration facilities;
- fragmentation among producers;
- limited access to certification.

Outlook:

- cooperation between producers;
- development of processing;



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THANK YOU FOR YOUR ATTENTION!

NULS of Ukraine