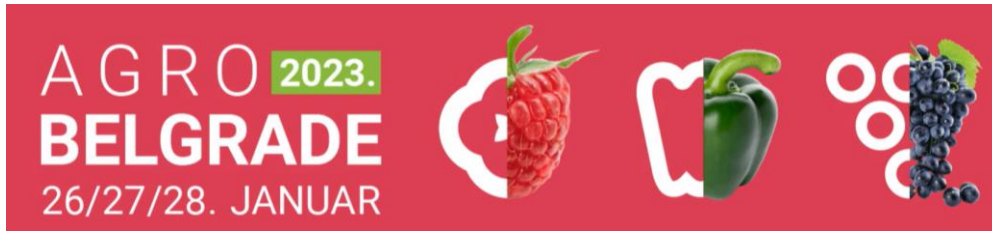


Export trends in the Serbian fruit and vegetables sector

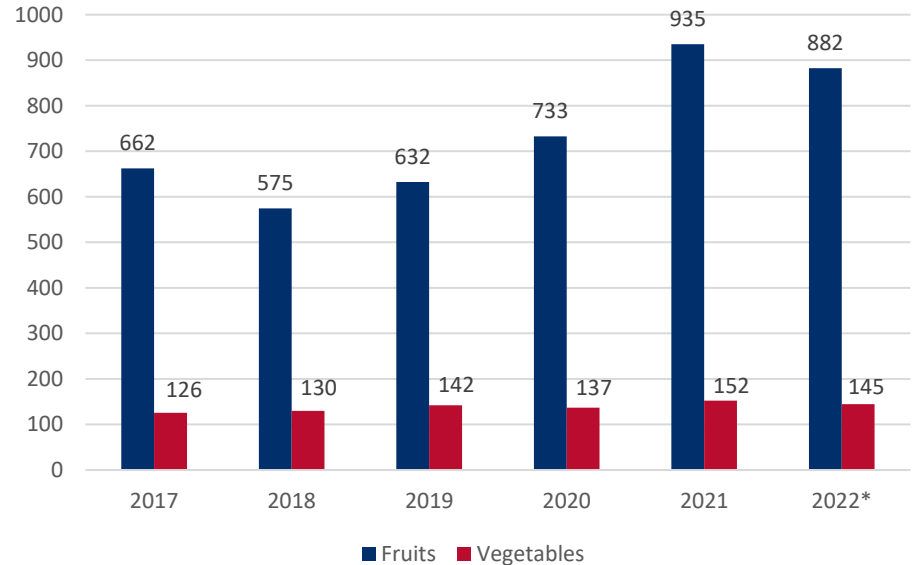


Total exports of fruit and vegetables

The agricultural sector accounts for 20% of Serbian exports.

In 2021, fruit and vegetables exports exceeded cereals exports the first time to top the list.

After exceptional overall growth from 2017 to 2021, last year saw a slight decrease in the value of exports.

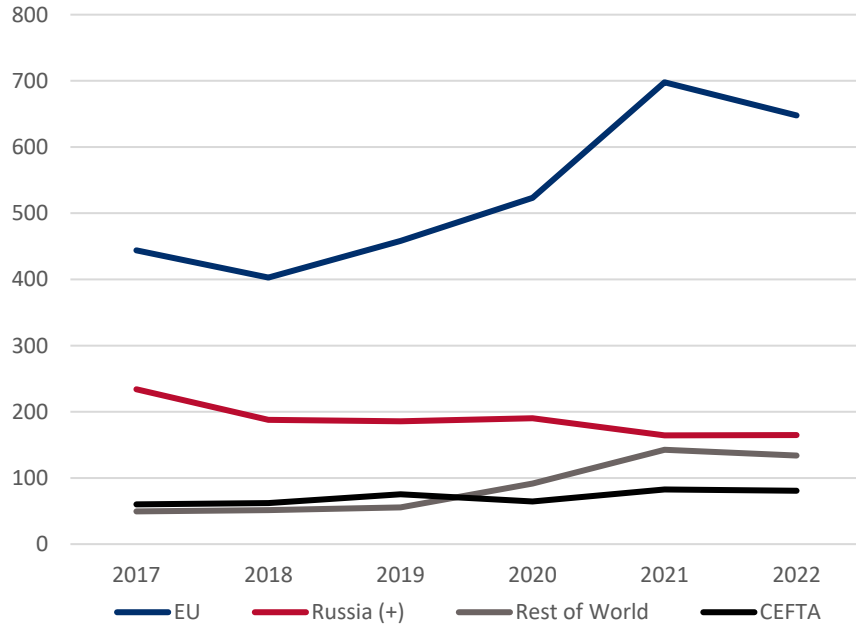


Year	2017	2018	2019	2020	2021	2022*
EUR mn	788	707	777	869	1,088	1,027
Change	+7,9 %	-10 %	+9,9 %	+11,8%	+25%	-6%

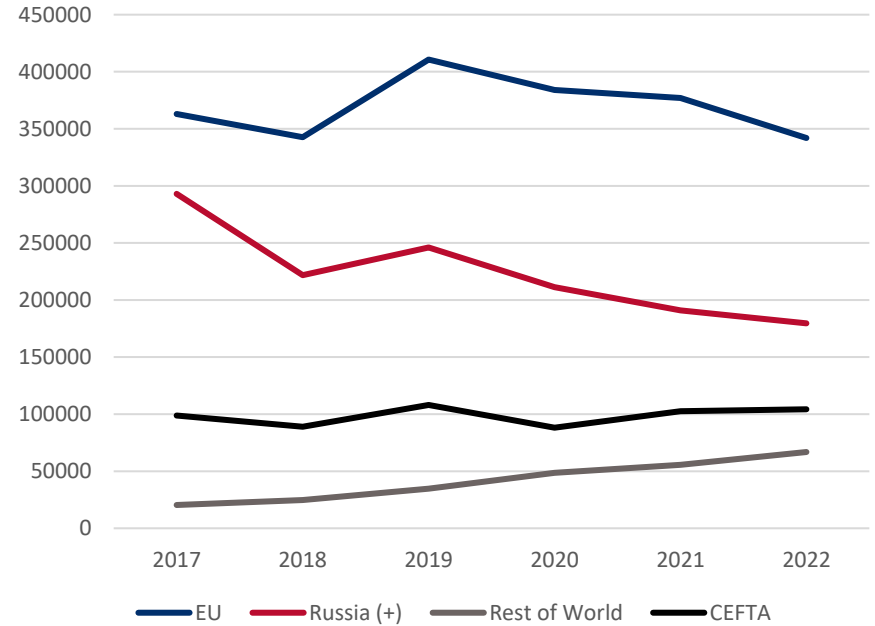
Q4 2022 projection is based on results for same quarter in previous 3 years

Exports to key regions, 2017 to 2022

Exports in EUR mn



Exports in 000 tonnes



Share of key markets in total exports

Country	2017	2018	2019	2020	2021	2022	Change % 17/22
Germany	18.1%	17.2%	18.1%	19.7%	19%	17.6%	▶/▼ -2.7%
Russia	29.2%	26.3%	23.7%	21.7%	15%	16%	▼ -45.2%
France	7%	7.2%	7.1%	6.5%	7.7%	9.1%	▲ 30%
Austria	4.6%	4.6%	4.2%	3.4%	4.6%	5.6%	▲ 21.7%
Belgium	3.5%	3.7%	3.5%	4.1%	5.5%	5.3%	▲ 51.4%
USA	3%	3.1%	2.3%	3.7%	6.2%	4.8%	▲ 60%
UK	3.5%	3.8%	4%	5%	4.3%	4.3%	▲ 22.9%
Netherlands	2.6%	3%	3.4%	4.1%	4.9%	4.3%	▲ 65.4%

Export of fruits in EUR mn

Individual share and changes in exports 2022/2021 as well as aggregate growth rate (CAGR) from 2017 to 2022

	2017	2018	2019	2020	2021	2022	Share 2022	Change 22/21	CAGR% (17- 22)
Frozen raspberries and blackberries	234	221	243	300	446	387	44.0%	-13.2%	8.8%
Frozen other fruit	96	83	87	105	116	122	13.9%	5.2%	4.1%
Fresh apples	110	86	106	110	108	100	11.3%	-7.7%	-1.7%
Warm processed other fruit	52	52	54	64	86	99	11.3%	15.7%	11.4%
Warm processed plums	15	13	13	16	27	26	3.0%	-3.8%	9.5%
Fresh blueberries	3	4	10	18	24	24	2.7%	1.0%	39.9%
Warm processed grapes	17	18	19	16	16	17	2.0%	4.5%	0.4%
Fresh peaches and apricots	42	23	20	23	20	16	1.9%	-16.6%	-14.4%
Warm processed apples	11	10	14	7	13	16	1.9%	24.3%	6.7%
Fresh cherries	23	15	13	16	12	16	1.8%	35.3%	-6.0%
Frozen strawberries	9	9	11	13	14	15	1.7%	3.0%	7.8%
Fresh plums	9	7	8	13	14	12	1.4%	-16.5%	4.1%
Fresh strawberries	18	16	14	14	14	10	1.1%	-28.5%	-9.6%
Fresh raspberries and blackberries	9	6	8	5	11	9	1.0%	-21.6%	-0.3%

Raspberries, frozen - price and quantity by country

	2021			2022			Price change (2022/21)	Qty change (2022/21)
	Price (EUR/Kg)	Weight (tonnes)	Price (EUR/Kg)	Weight (tonnes)				
Germany	€ 3.24	36,346	€ 3.65	27,122	€ 0.41	-34%		
France	€ 3.33	20,457	€ 3.96	19,412	€ 0.63	-5%		
Belgium	€ 3.54	11,332	€ 3.87	8,288	€ 0.34	-37%		
USA	€ 4.19	10,453	€ 3.74	6,837	€ (0.45)	-53%		
Poland	€ 3.20	7,877	€ 3.35	5,523	€ 0.15	-43%		
UK	€ 3.53	6,937	€ 3.73	5,923	€ 0.20	-17%		
Netherlands	€ 3.32	6,844	€ 3.68	4,618	€ 0.37	-48%		
Sweden	€ 3.49	4,691	€ 4.36	3,835	€ 0.87	-22%		
Canada	€ 3.72	4,496	€ 3.95	3,002	€ 0.23	-50%		
Austria	€ 3.37	4,337	€ 3.41	4,843	€ 0.04	10%		

Apples, fresh - price and quantity by country

	2021			2022			Price change (2022/21)	Qty change (2022/21)
	Price (EUR/Kg)	Weight (tonnes)	Price (EUR/Kg)	Weight (tonnes)				
Russia	€ 0.64	124,517	€ 0.60	115,108	€ 0.41	-8%		
Hungary	€ 0.11	7,736	€ 0.11	12,019	€ 0.63	36%		
UAE	€ 0.82	5,940	€ 0.79	8,677	€ (0.45)	32%		
Saudi Arabia	€ 0.81	5,212	€ 0.76	6,988	€ 0.20	25%		
UK	€ 0.59	5,400	€ 0.56	5,999	€ 0.15	10%		
Bosni and Herzegovina	€ 0.12	6,113	€ 0.14	3,834	€ 0.34	-59%		
India	€ 0.80	2,045	€ 0.75	3,784	€ 0.04	46%		
Montenegro	€ 0.39	2,735	€ 0.34	2,425	€ 0.87	-13%		
Romania	€ 0.41	2,915	€ 0.32	1,525	€ 0.37	-91%		
Slovenia	€ 0.41	2,130	€ 0.36	1,041	€ 0.23	-105%		

Blueberries, fresh - price and quantity by country

	2021		2022			
	Price (EUR/Kg)	Weight (tonnes)	Price (EUR/Kg)	Weight (tonnes)	Price change (2022/21)	Qty change (2022/21)
Netherlands	€ 5.36	2,422	€ 4.70	1,595	€ (0.66)	-34%
Russia	€ 5.94	619	€ 5.25	1,438	€ (0.69)	132%
Germany	€ 5.42	537	€ 4.76	653	€ (0.66)	22%
Poland	€ 5.00	276	€ 4.30	526	€ (0.70)	91%
UK	€ 5.58	302	€ 4.55	374	€ (1.02)	24%
Belgium			€ 5.01	98		
Spain			€ 5.24	40		
Czechia	€ 5.79	33	€ 4.62	39	€ (1.17)	
Austria	€ 6.63	27	€ 6.01	38	€ (0.62)	
Norway			€ 7.35	35		

Export of vegetables in mil. Eur

Individual share and changes in exports 2022/2021 as well as the aggregate growth rate (CAGR) in the period 2017-2022

	2017	2018	2019	2020	2021	2022	Share 2022	Change 22/21	CAGR% (2017-2022)
Frozen potatoes	16	17	16	15	22	21	15.0%	-4.9%	5.2%
Frozen legumes	17	21	22	19	20	16	11.6%	-17.0%	-0.9%
Warm processed other vegetables	8	9	10	13	15	16	11.0%	1.7%	11.2%
Frozen other vegetables	8	8	9	9	9	14	10.1%	66.9%	10.9%
Frozen pepper	16	18	15	12	11	13	8.9%	12.3%	-3.4%
Hot processed mushrooms	7	9	9	13	13	12	8.1%	-8.9%	7.6%
Fresh cucumber	7	8	9	11	14	9	6.1%	-36.8%	2.9%
Hot processed paprika	5	4	7	6	5	6	4.4%	19.5%	5.1%
Fresh peppers	8	7	7	8	5	6	3.9%	3.1%	-6.2%
Warm processed tomatoes	3	2	2	3	5	5	3.4%	-4.2%	11.7%
Warm processed cucumber	2	2	4	4	5	5	3.3%	-4.1%	19.5%
Fresh onions	3	5	6	3	3	4	3.1%	36.3%	8.3%
Fresh tomatoes	5	5	5	3	4	4	3.0%	17.0%	-1.3%
Fresh mushrooms	11	5	5	7	8	3	2.0%	-63.2%	-20.6%
Fresh potatoes	4	1	3	2	3	1	0.9%	-59.7%	-16.0%

Thank you!

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