

Strawberries and Berries Production and Export Trends – Globally and from Serbia

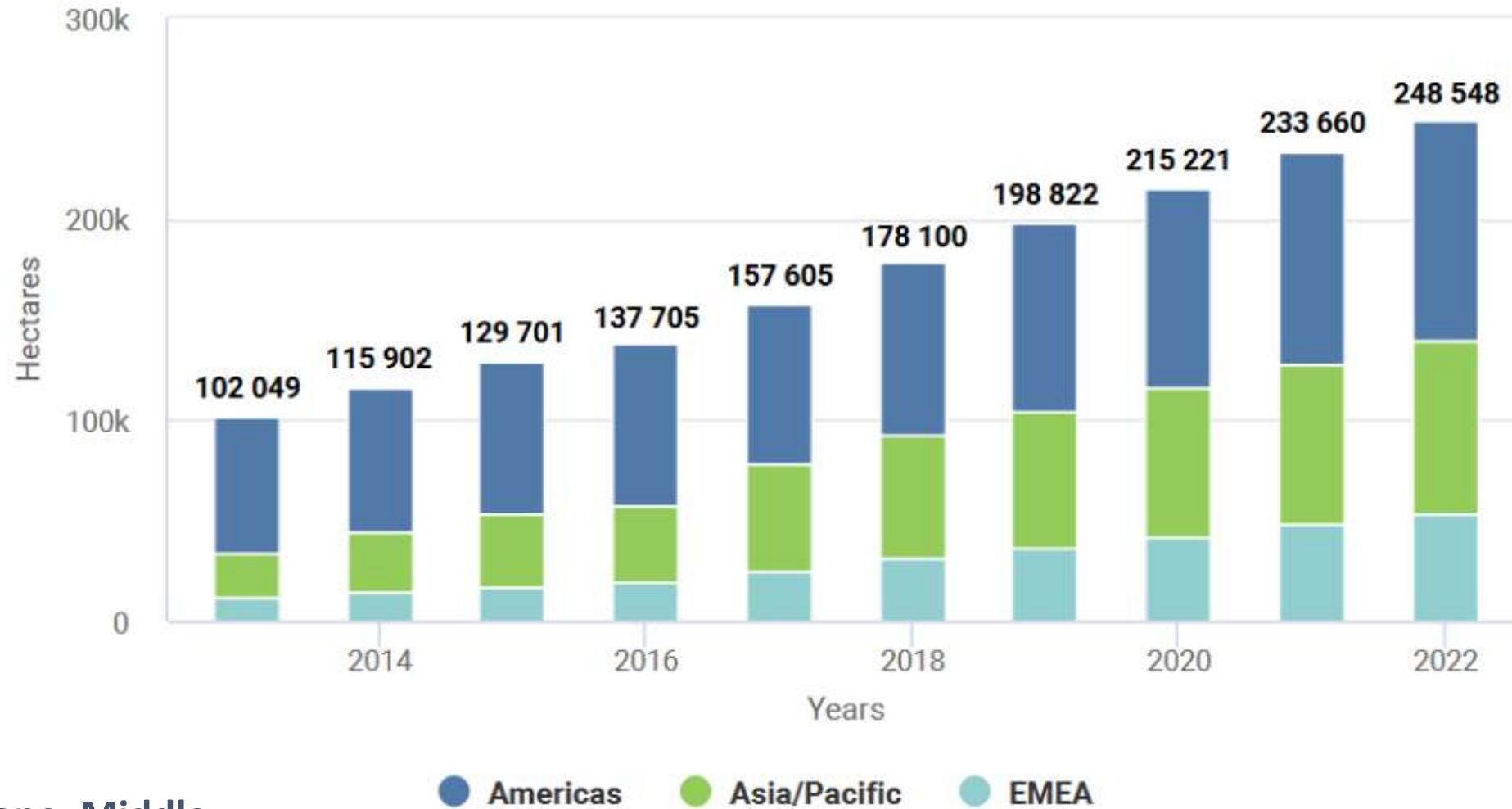




OVERVIEW

- Global production trends and prices of fresh blueberries;
- Overview of the export competitiveness of fresh blueberries from Serbia;
- Analysis of Serbian export of fresh berries (values, quantities, average prices, destinations);
- The latest data on the export of fresh and frozen berries (2023, 7 months);
- Export trends of frozen berries;
- Characteristics of the fresh fruit and vegetable market in the EU and customer expectations.

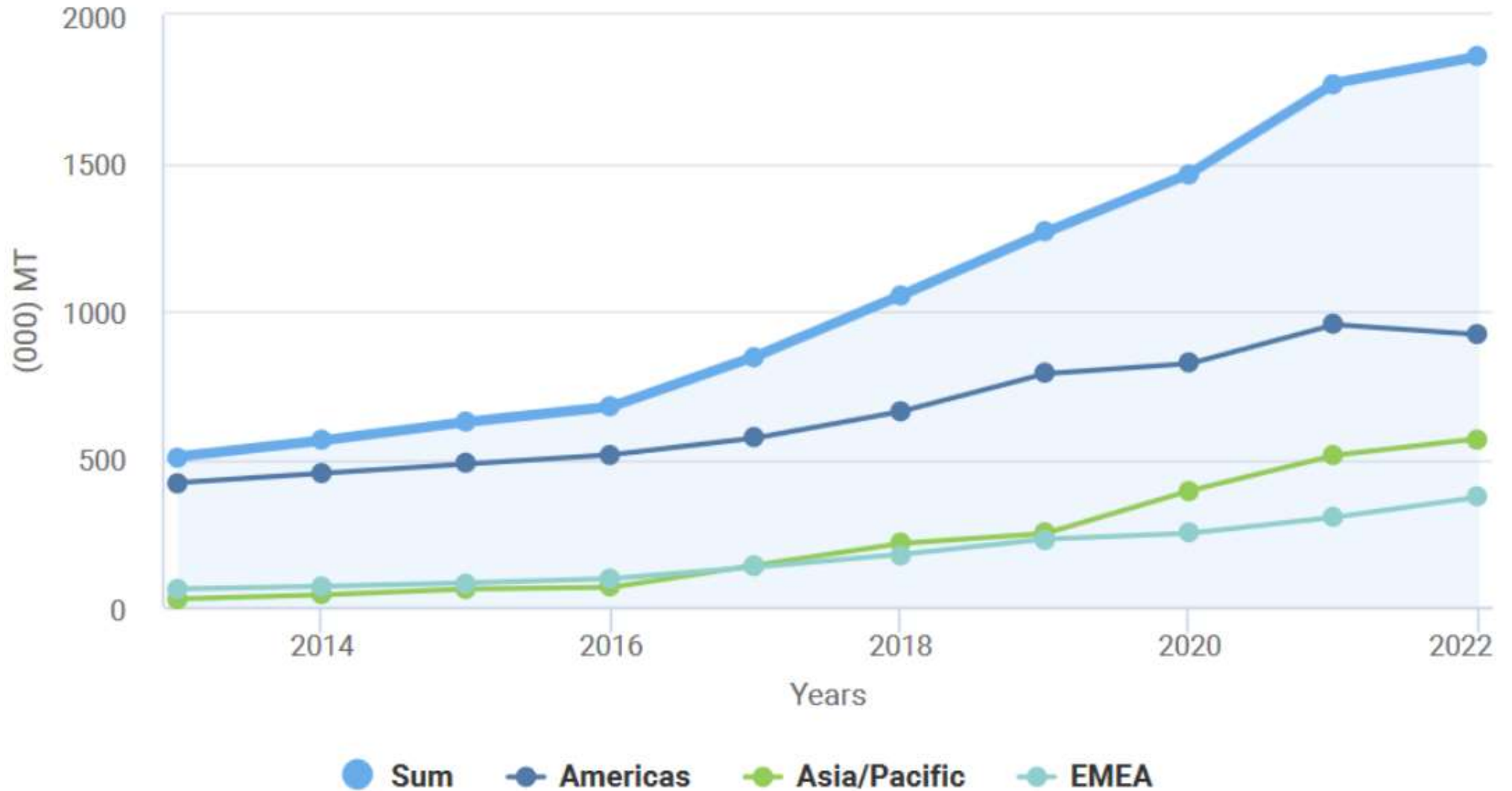
Global Fresh Blueberry Production in Hectares (2014–2022)



EMEA – Europe, Middle East and Africa

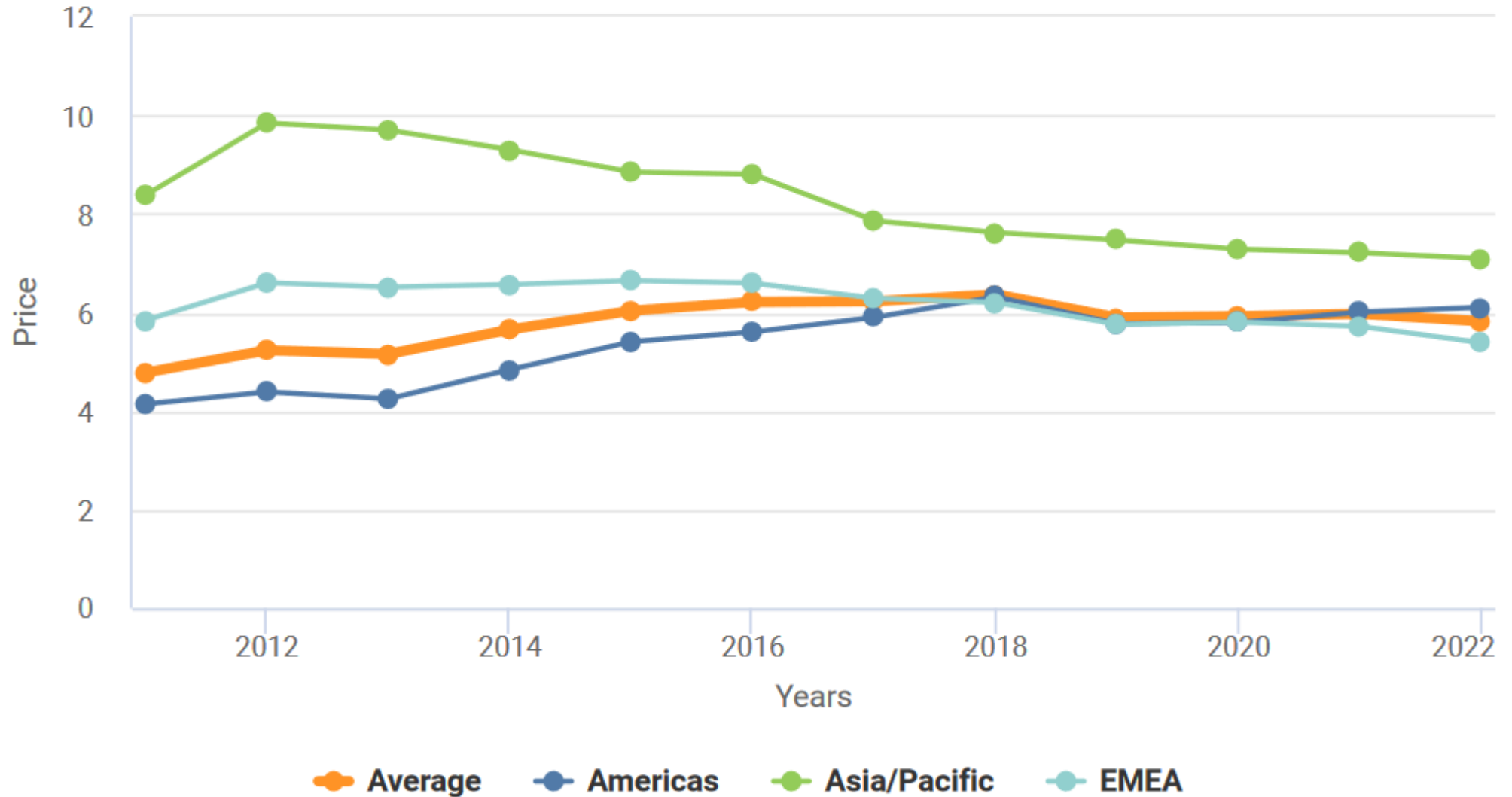
Source: IBO

Global Fresh Blueberry Production in Hectares (2014–2022)



Source: IBO

Global Fresh Blueberry Import Prices, Regional, USD/kg (2012–2022)



Source: IBO

Global Seasonal Fresh Blueberry Import Prices, USD/kg (2012–2022)

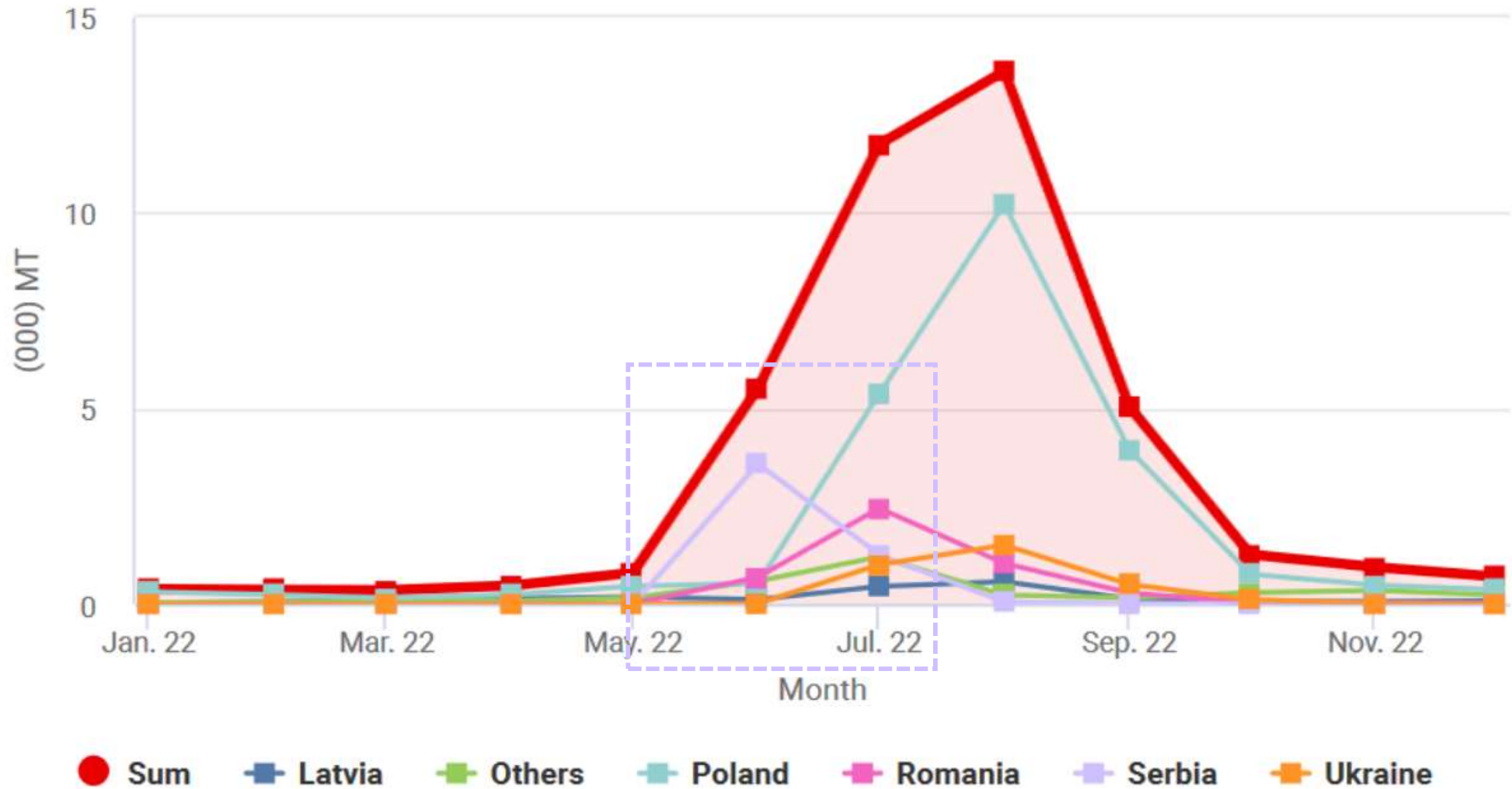


Source: IBO

Global Imports of Fresh Berries by Region (2022, in millions of EUR)

Region	Value of imports (million EUR)
Entire world	12.852
America (North and South)	5.905
(of which US)	4.728
EU28 (with Great Britain)	5.325
Asia	1.071
EAEU (Russia)	192
Oceania-Australia	24
CEFTA	15
Africa	15

2022, Fresh Blueberry Export from Eastern Europe, Seasonally, by Country (000 tons)



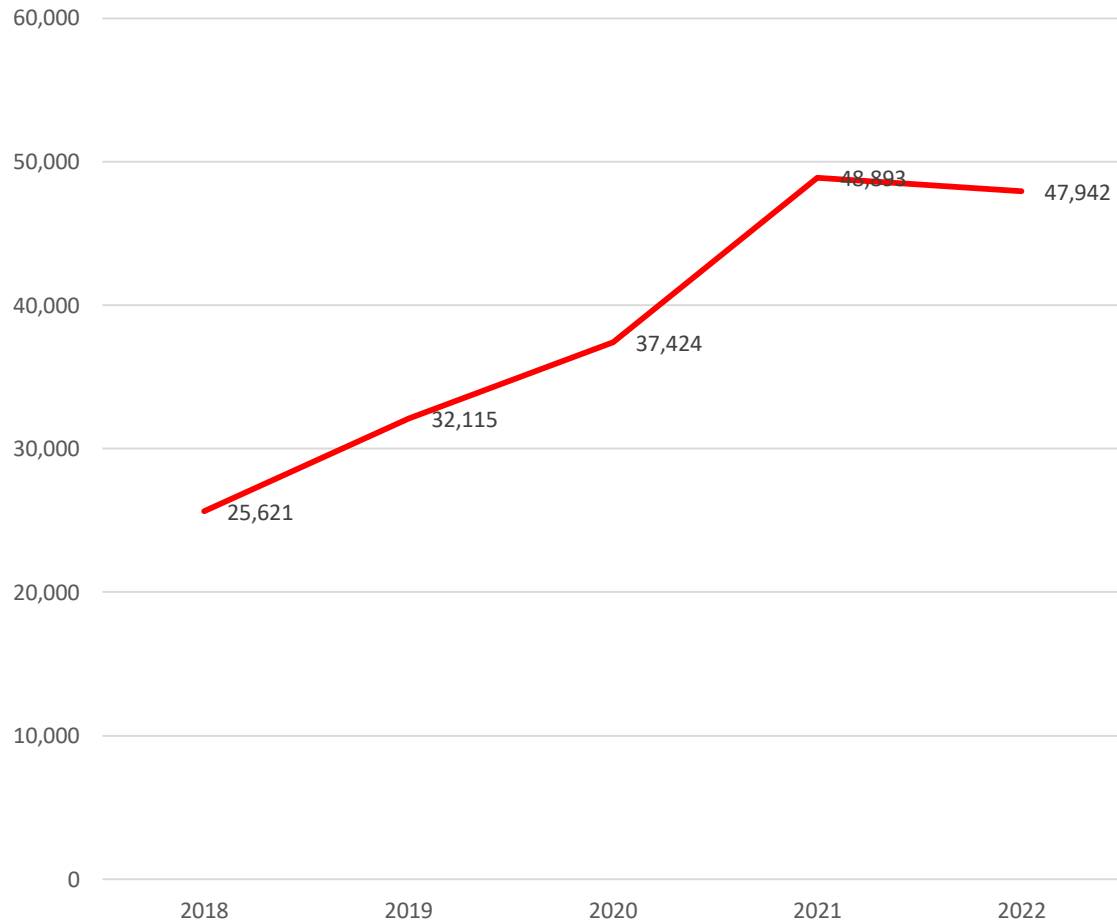
Source: Agronometrics Global Trade Data

Blueberry Cultivation in Eastern Europe by Country (ha, 2018–2022)

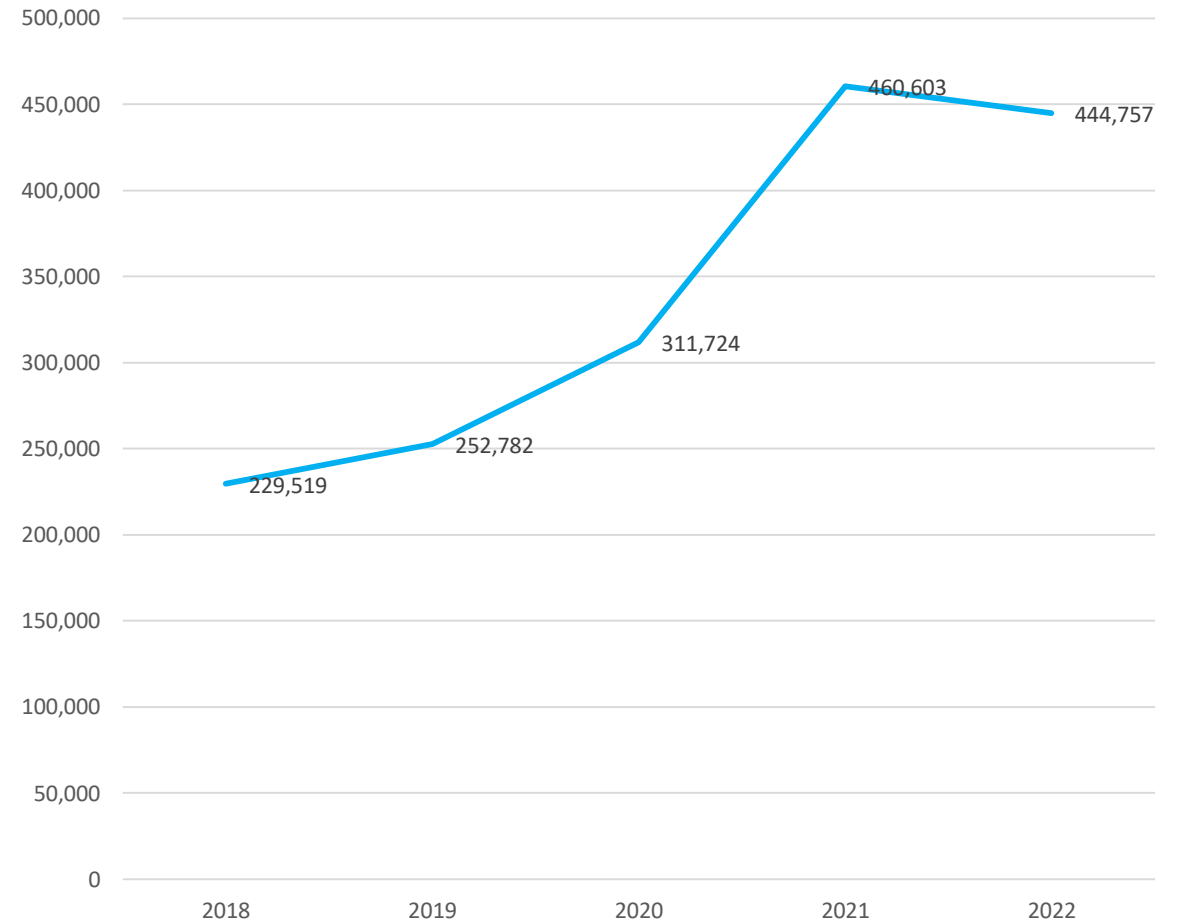
Eastern Europe	Cultivation (ha)				
Total, cultivation (hectares)	2018	2019	2020	2021	2022
Poland	7,400	8,450	9,500	11,000	11,913
Georgia	110	405	700	1,500	2,115
Serbia	1,539	1,612	1,800	2,360	3,000
Ukraine	2,183	3,183	4,383	5,318	5,500
Romania	550	1,025	1,500	2,000	2,500
Belarus	250	270	290	362	400
Bosnia and Herzegovina	170	170	170	190	190
Lithuania	170	200	270	300	350
Croatia	250	290	360	380	400
Latvia	500	510	500	600	550
Total Eastern Europe	13,367	16,635	20,268	25,219	28,436

Export Trends of Fresh and Frozen Berries from Serbia

Export of fresh berries (000 EUR)



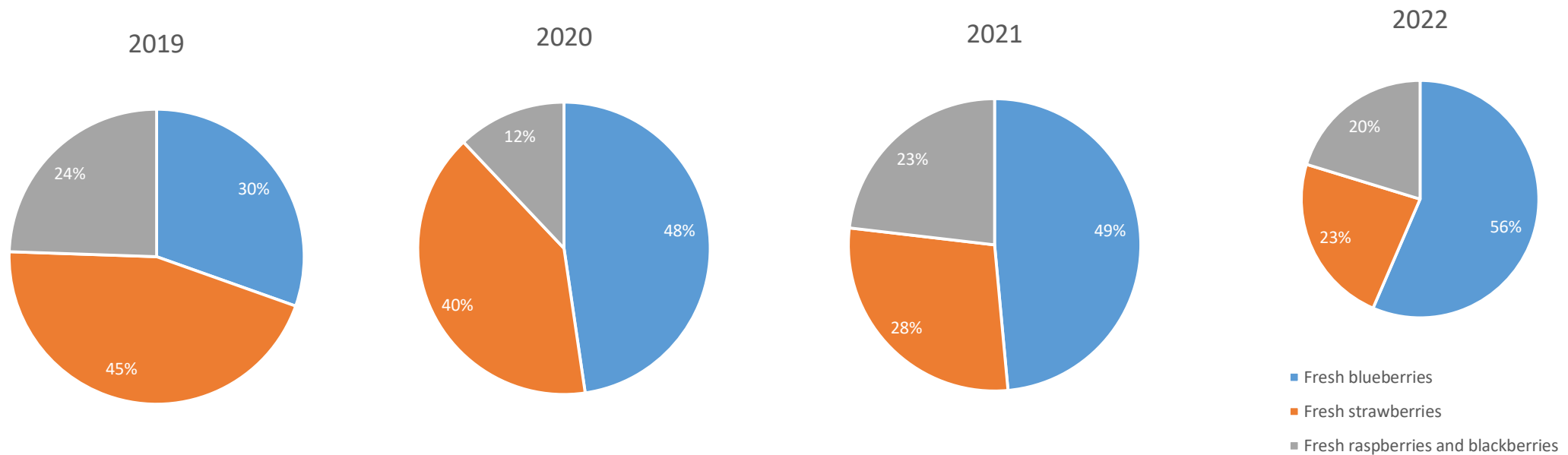
Export of frozen berries (000 EUR)



The structure of Serbian fresh-frozen exports has not changed significantly

	2018	2019	2020	2021	2022
% fresh in the total export of berries	10.0%	11.3%	10.7%	9.6%	9.7%

... but fresh blueberry grew significantly compared to fresh strawberries.



Destinations of Serbian Exports of Fresh Berries, Quantities and Average Prices (thousands of EUR)

Export of fresh berries	2018	2019	2020	2021	2022	Ton (2022)	EUR/kg (2022)
Russia	18,082	17,698	19,709	15,669	19,456	6,737	€ 2.89
The Netherlands	1,422	5,712	8,520	13,656	8,437	1,595	€ 5.29
Austria	2,114	3,332	788	5,035	6,432	1,863	€ 3.45
Germany	1,274	2,932	3,218	5,434	3,986	898	€ 4.44
Poland	710	656	2,018	2,600	2,818	670	€ 4.21
Italy	728	749	1,009	2,662	2,440	608	€ 4.01
Great Britain	0	434	672	1,682	1,921	374	€ 5.14
IN TOTAL	25,621	32,115	37,424	48,893	47,942	13,329	€ 3.60

Analysis of Serbian Exports of Fresh Blueberries in 2022

Export of fresh blueberries in 2022	'000 EUR	Stake (%)	Ton	EUR/kg	Increase % (2018–2022)
Russian Federation	8,552	31.6%	1,438 €	5.95	29%
The Netherlands	8,435	31.2%	1,595 €	5.29	52%
Germany	3,521	13.0%	653 €	5.39	347%
Poland	2,486	9.2%	509 €	4.88	
United Kingdom	1,921	7.1%	374 €	5.14	
Belgium	557	2.1%	98 €	5.68	
Norway	293	1.1%	35 €	8.37	
Austria	255	0.9%	38 €	6.71	
Spain	233	0.9%	40 €	5.83	
IN TOTAL	27,070	100.0%	4,920 €	5.50	57%



Analysis of Serbian Exports of Fresh Strawberries in 2022

Export of fresh strawberries in 2022	'000 EUR	Stake (%)	Ton	EUR/kg	Increase % (2018–2022)
Russia	10,300	92%	5,093	€ 2.02	-10%
Poland	323	3%	159	€ 2.03	-12%
Croatia	173	2%	75	€ 2.31	107%
Montenegro	138	1%	79	€ 1.75	3%
IN TOTAL	11,145	100%	5.505	€ 2.02	-9%

Analysis of Serbian Exports of Fresh Raspberries in 2022

Export of fresh raspberries in 2022	'000 EUR	Stake (%)	Ton	EUR/kg	Increase % (2018–2022)
Austria	6,099	63%	1,801	€ 3.39	26%
Italy	2,382	25%	600	€ 3.97	43%
Russia	593	6%	200	€ 2.97	-16%
Germany	465	5%	245	€ 1.90	-21%
IN TOTAL	9,714	100%	2,898	3.35	14



Latest Data on Serbian Export of Berries – the first 7 months of 2023

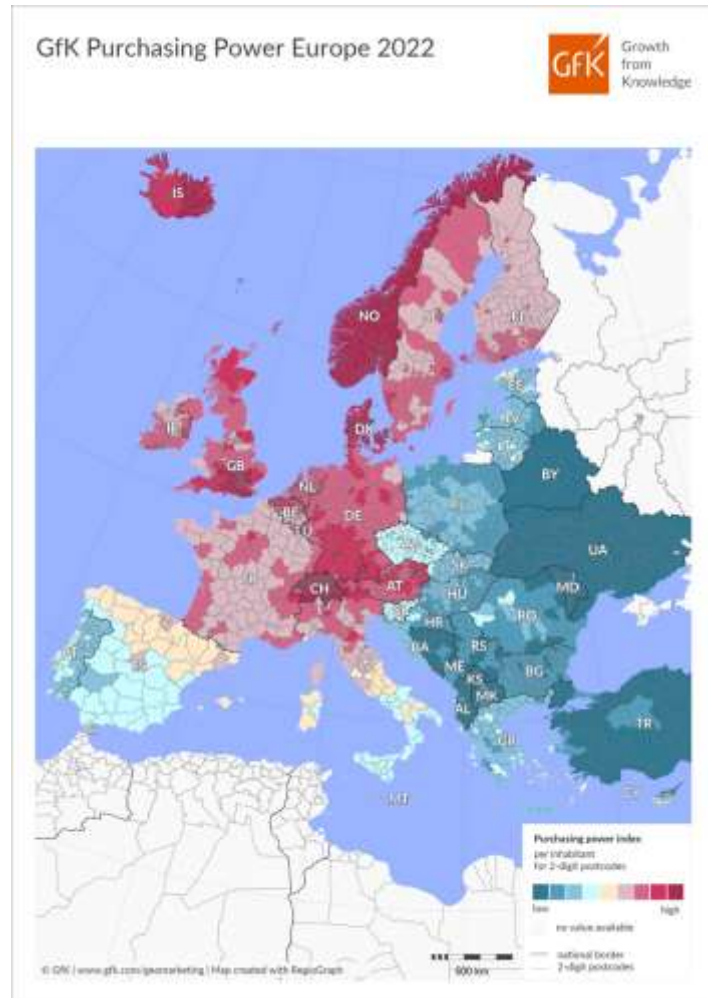
	Quantity (kg)	EUR value	Average price
Fresh strawberries	4,377,166	8,956,421	€ 2.05
Fresh raspberries	721,406	1,503,690	€ 2.08
Fresh blackberries	334,485	783,610	€ 2.34
Fresh blueberries	5,913,608	32,980,856	€ 5.58
Frozen strawberries	4,211,963	9,119,618	€ 2.17
Frozen raspberries	48,960,431	200,664,037	€ 4.10



Characteristics of the Fresh Fruit and Vegetable Market in the EU and Customer Expectations



The EU is one market, but also 27 specific countries with specific mentality...



Northwestern Europe:

- The highest purchasing power
- Large, dominant supermarket chains with high quality and safety standards
- Food safety and health aspects strongly promote organic
- The trend for ready-to-use (convenience) food is growing.



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Southern Europe:

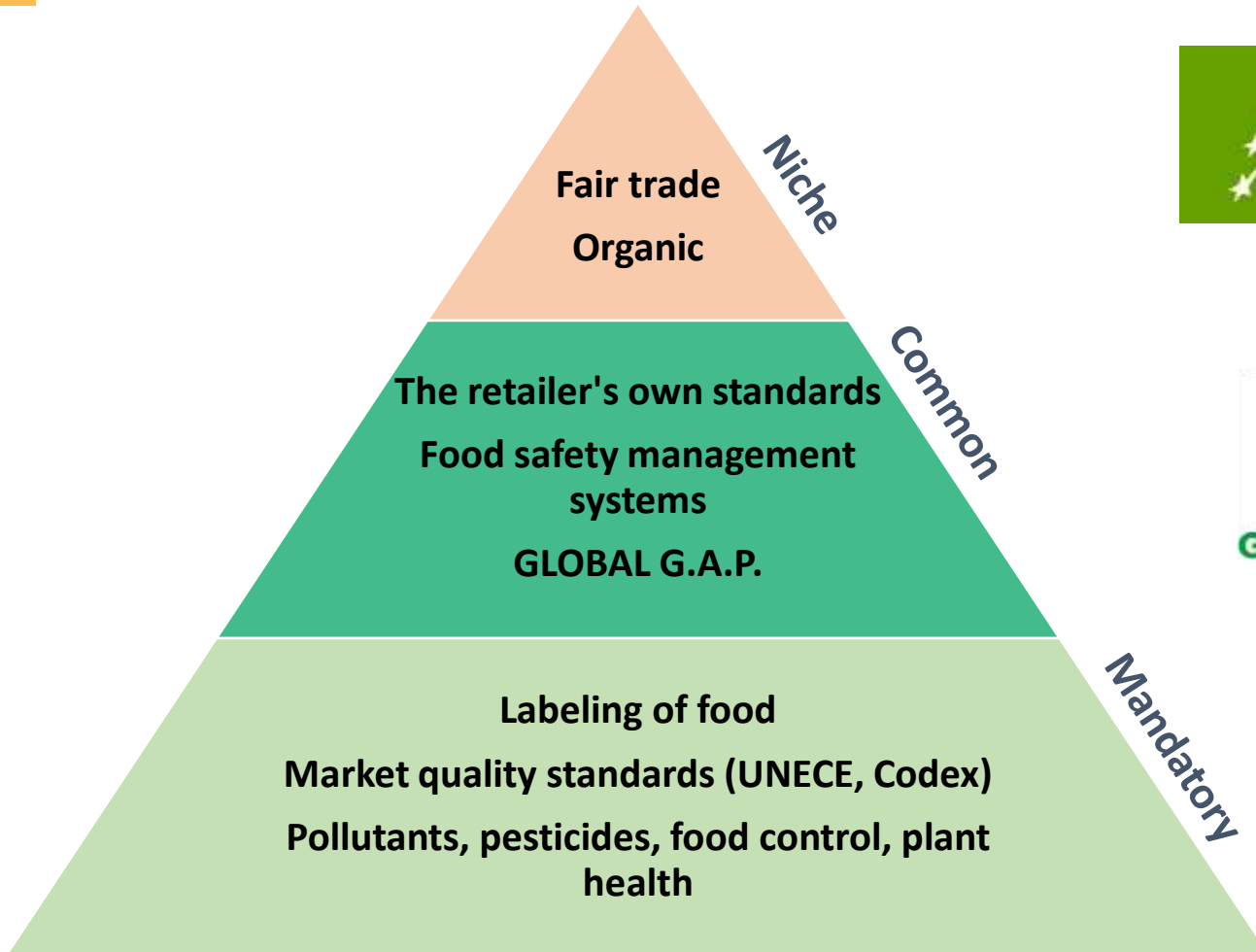
- Large fruit and vegetable producers themselves
- They spend more time shopping and preparing food
- High consumption of fruits and vegetables (approximately 80% of the population has a daily intake of fresh fruit)

Eastern Europe:

- Less consumption of fruit per capita, focus on local varieties
- Lower purchasing power compared to Western Europe
- Great potential for future growth and direct supply to these countries



Requirements Regarding Access to the EU Market





Requirements Regarding Access to the EU Market

- **Private** standards that have become common in production and trade:
 - GLOBAL GAP in fruit and vegetable production processes.
 - IFS or BRC in handling, packaging, processing processes.
- **Social** standards:
 - GRASP
 - Sedex Smeta
- **Optional**, "niche standards":
 - Organic, Rain Forest Alliance, Fair Trade
 - Sustainable water management may soon become a mandatory aspect.
- **Aspects of CSR** supermarket activities: concern for the environment, for social issues, for reducing food loss through waste (food waste).

EU Legislative Framework

- List of registered pesticides in the EU
- Maximum allowed amounts of pesticide residues (MDC, i.e. MRLs) – expressed in mg per kg of product – fruit, vegetables
- Also in the database there are ARfD – acute reference doses of pesticides – expressed in mg per kg of body weight of human consumers.
- Compliance with the MRL/ARfD is a very important issue for each exporting company individually, as well as for the country and its reputation within the EU.
- [LINK: EU Pesticides Database \(europa.eu\)](https://europa.eu/european_council/en/eu-pesticides-database)



The screenshot shows the European Commission website interface. At the top left is the European Commission logo. To the right, there is a language selector set to 'English' and a search box. Below the header, the navigation menu includes 'Home', 'Food', 'Animals', 'Plants', and 'Horizontal topics'. The 'Plants' menu item is currently selected. Below the navigation, a breadcrumb trail reads 'Home > Plants > Pesticides > EU Pesticides Database'. The main heading is 'EU Pesticides Database'. The introductory text states: 'The EU Pesticides Database allows users to search for information on active substances used in plant protection products, Maximum Residue Levels (MRLs) in food products, and emergency authorisations of plant protection products in Member States. Users can use the following search options to find information:'. A bulleted list starts with 'Active substances', followed by a partially visible second item: 'The database contains information on active substances (including those that are low risk or

Supermarkets are stricter than the EU law

- Supermarkets in the EU exceed the requirements of the EU law
- Stricter MRL levels: in some places no more than 1/3 of the legally allowed MRL levels for a given substance-product – common practise among supermarkets.
- They are also guided by the ARfD (focus on consumer health)
- Control of the maximum number of detected active substances

LIDL:

- Up to 33% of the EU MRL level of individual pesticides
- Up to 100% of the ARfD sum at the EU level

ALDI:

- Up to 70% of the EU MRL of individual pesticides
- Up to 80% of the MRL sum for the EU
- Up to 80% of the ARfD sum for the EU
- Less than 5 active substances detected



REWE:

- Up to 70% of the EU MRL of individual pesticides
- Up to 70% of the ARfD sum for the EU

Marketing Standards – Fruit and Vegetable Quality Standards

- They refer to the minimum quality and minimum maturity of fresh fruits and vegetables
- The standards provide definitions of “Extra” class, “Class I” and “Class II” and the tolerance regarding the quality and size of the fruits within these classes.
- There are specific marketing standards for fresh fruits and vegetables (Annex I, Part B of Regulation (EU) No 543/2011)
- The standards are harmonized with UNECE standards - [LINK](#)
- Example: UNECE standard for berries - [LINK](#)
- Example: illustrated OECD brochure on the marketing quality standard of strawberries - [LINK](#)





THANK YOU!

