



# Global trends in the frozen and processed fruit and vegetables sector and impact on the Western Balkans food industry in 2023 and 2024

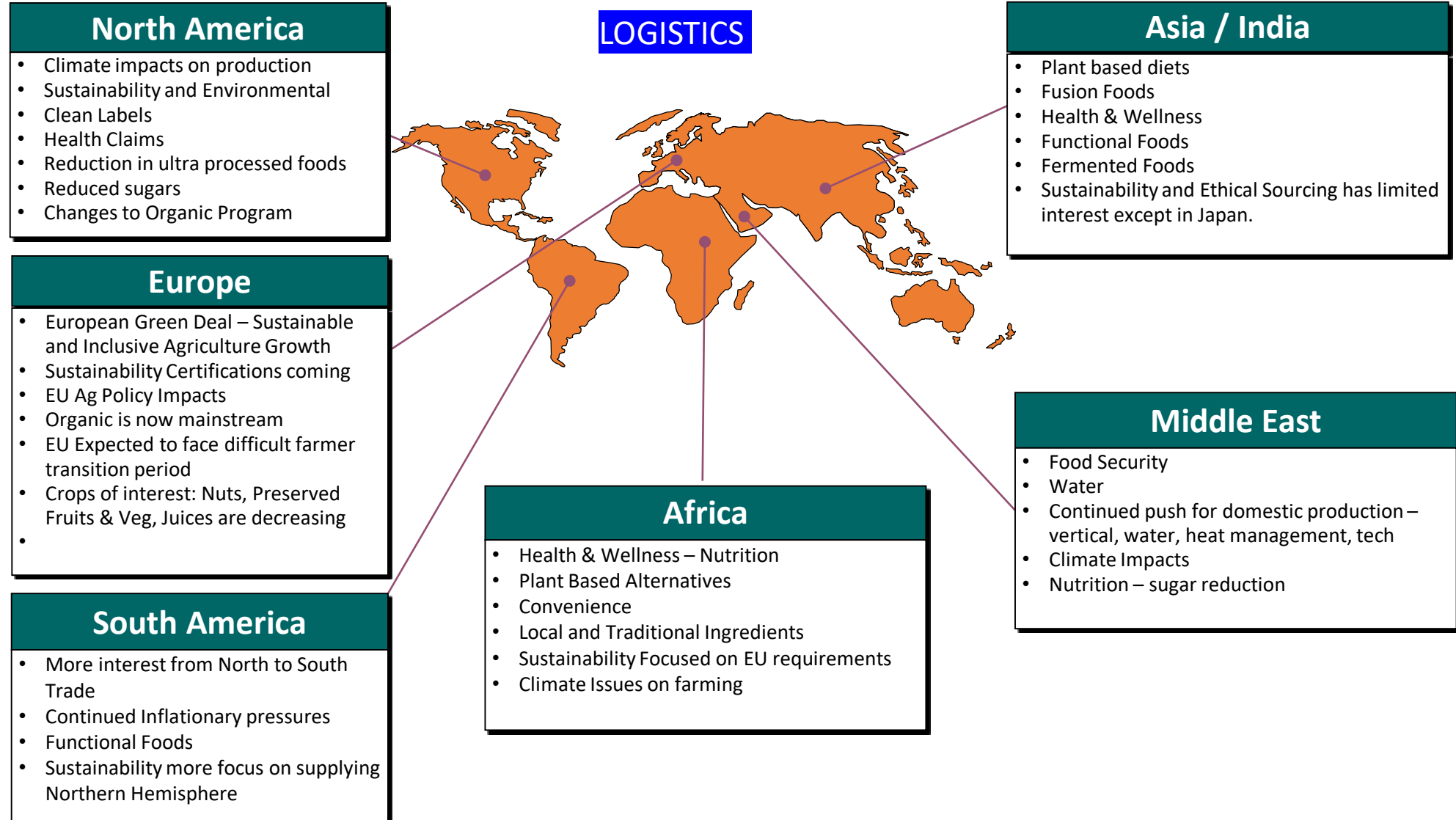
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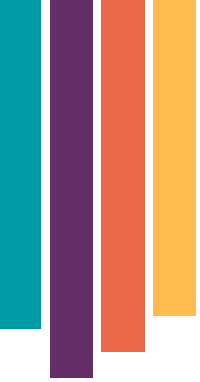


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# Global Trends in Agriculture and Food



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- Climate Change – consumers are becoming more aware of sustainability and the impact the production of a product has on the environment...however, if there are climate crisis's that seem overwhelming, consumers will turn to food security with little consideration to sustainability issues as they did during Covid



# My Supply Chain

- Near-Shoring Supply Chains and Globally Diversified
- 12 Month Supply Options – if not all fresh then semi-processed
- Logistics
- Vertical Integration
- Labor Issues and Worker Support
- Input Supply Verification Process with Supply Partners
- On-sight visits every 3-months
- Farmer Support – GAP, Training, Inputs, Standards
- Direct Financial Support, When Necessary, with Advances
- Own Farms When Necessary
- Climate, Sustainability, Water, Waste-Water, Environment



# Serbia Export Highlight vs Global Trends Preserved Products

5-Year CAGR Quantities

HTS #	Product	Serbia Export Growth	Serbia Top Export Market	World Import Growth	Top Import Market	Top Import Growth Market
2001	Pickles	17%	Germany 90%	3%	USA 14%	China 51%
2002	Tomatoes	30%	Croatia 206%	3%	Germany 4%	Turkiye 131%
2003	Mushrooms	25%	Italy 17%	4%	USA 5%	Hong Kong 52%
2009	Fruit Juices	1%	Austria 4%	0%	USA 0%	Turkiye 39%
2005	Preserved Vegetables	6%	BiH 23%	2%	USA 8%	Kyrgyzstan 97%
2007	Jams / Purees	4%	Germany 2%	3%	USA 12%	Finland 62%

# Serbia Export Highlight vs Global Trends

## Vegetables

5-Year CAGR Quantities

HTS #	Product	Serbia Export Growth	Serbia Top Export Market	World Import Growth	Top Import Market	Top Import Growth Market
071080	Frozen Pepper & Mushrooms	-16%	Italy 13%	0%	USA 2%	Guatemala 85%
071040	Frozen Sweet Corn	8%	Turkiye ?	3%	Japan -1%	Turkiye 125%
071021	Frozen Peas	-9%	Turkiye 268%	-1%	USA 4%	Turkiye 93%
071290	Dried Vegetables	7%	Germany 6%	2%	USA -2%	Israel 164%
071239	Dried Mushrooms	10%	Italy 6%	-14%	Thai -16%	USA 17%
070959	Fresh Mushrooms	9%	Italy 16%	-2%	Italy -18%	Sweden 46%
070960	Fresh Peppers	10%	Croatia -9%	3%	USA 3%	Austria 12%
070951	Fresh Mushrooms	76%	Macedonia 116%	2%	USA 10%	Ireland 120%
0707	Cucumbers	6%	Germany 16%	1%	USA 4%	Ukraine 29%



# Serbia Export Highlight vs Global Trends Fruits

5-Year CAGR Quantities

HTS #	Product	Serbia Export Growth	Serbia Top Export Market	World Import Growth	Top Import Market	Top Import Growth Market**
081120	Frozen Rasp/Black	-12%*	Germany -13%	-1%	Germany -4%	Lithuania 20%
081190	Frozen Cherries	5%	Germany 0%	5%	USA 5%	China 31%
081110	Frozen Straw	13%	Germany 8%	5%	USA 17%	China 31%
0808	Fresh Apples	-2%	Russia -7%	0%	Germany -3%	India 13%
081320	Dried Prunes	18%	Netherlands 95%	0%	China 31%	China 31%

\* Serbian Export Growth based on 5-Year Data 2019-2023 Estimated

\*\*Top growth Market selected based on ready access for Serbia



# Serbian Frozen Raspberries

- Primary European Competition: Poland & Ukraine
- Current Market Offers: 24 / 01 / 2024
  - Serbia 2.30 Euro – 2.50 Euro / Kg (up from a low of 2.10 Euro / Kg in Dec) for Rolend Quality
  - Poland Avg. 2.30 Euro / Kg
  - Ukraine: 2.20 Euro – 2.40 Euro / Kg
- Low Fall prices from Poland and Ukraine depleted inventories.
- While Serbia has raised prices due to reduced inventories in Poland and Ukraine, there are no new buyers accepting the current pricing. Current exports are contractual deliveries.
- International Buyers are still paying attention to the financial issues facing the Serbian industry and the lack of solutions.
- Even if there is a continued moratorium on bank payments, there will be no working capital available for the 2024 season for operations or to purchase new season harvest.
- Serbia is expected to continue to lose market share unless the payment scheme for farmers is revised to a market system without government intervention.
- From 2019-2023, Serbian exports of IQF Raspberry are projected to have a -12% CAGR. Down from a 5-year high of 114,000 MT to approximately 68,000-70,000 MT.

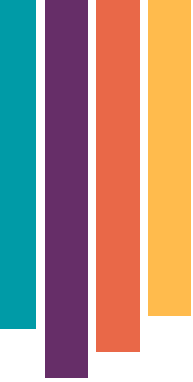


# Serbia Export Highlight vs Global Trends

## Fruits

5-Year CAGR Quantities

HTS #	Product	Serbia Export Growth	Serbia Top Export Market	World Import Growth	Top Import Market	Top Import Growth Market
080940	Fresh Plums	11%	Russia -18%	3%	China 13%	Saudi 24%
080930	Fresh Peaches	-11%	Russia -26%	-4%	Germany -8%	Russia 19%
080929	Fresh Cherries (Sweet)	0%	Russia -11%	10%	China 20%	Poland 40%
080921	Fresh Cherries (Sour)	-9%	Russia 1%	-8%	Russia 22%	Portugal 332%
080910	Fresh Apricots	20%	Romania 10%	-5%	Germany -6%	Spain 18%
081040	Fresh Blueberries	61%	Russia 28%	14%	USA 9%	Netherlands 29%
081010	Fresh Strawberries	-12%	Russia -13%	4%	USA 12%	Romania 22%
081020	Fresh Raspberries	-21%	Austria -20%	20%	USA 39%	Saudi 29%
080221	Hazelnuts	308%	Italy 308%	18%	China 20%	Austria 110%



**THANK YOU!**

