

Serbian Fruit and Vegetable Sector

Market and Export Results in 2023 and Perspectives in 2024

AGRO BELGRADE
25/26/27. JANUAR 2024.



The agricultural sector and its role in exports

	2018	2019	2020	2021	2022	2023
Export of Serbian agriculture (million EUR)	2,835	3,211	3,599	4,219	4,822	4,610
Total exports from Serbia (million EUR)	16,221	17,470	16,984	21,611	27,291	28,563
Share in total exports	17%	18%	21%	20%	18%	-16%

Fruit and vegetable sector in export

In millions of EUR	2018	2019	2020	2021	2022	2023
Total export of fruits and vegetables 2017-2023	702	767	859	1,079	1,165	1,075
Year-on-year change		9%	12%	26%	8%	-8%

Export of fresh apples to top markets in 2023

Export of fresh apples to top markets in 2023	000 EUR	Ton	EUR/kg
<i>World</i>	83,586	113,093	€ 0.74
Saudi Arabia	8,651	9,686	€ 0.89
United Arab Emirates	6,834	7,996	€ 0.85
Russia	45,795	60,028	€ 0.76
Great Britain	3,705	4,874	€ 0.76
India	3,613	3,934	€ 0.92
Oman	968	1,009	€ 0.96
Qatar	1,804	1,914	€ 0.94
Bosnia and Herzegovina	1,051	5,323	€ 0.20

Export of fresh apples in 000 EUR to top markets (2018-2022)

Export of fresh apples in 000 EUR (2018-2022)	2018	2019	2020	2021	2022
<i>World</i>	85,109	105,904	110,507	107,684	101,865
Russia	78,284	90,888	92,226	79,535	68,560
United Arab Emirates	82	2,556	3,719	4,877	7,857
Saudi Arabia	285	771	1,453	4,210	6,795
Great Britain	662	2,071	2,673	3,161	3,582
India	-	-	216	1,633	3,073
Qatar	12	584	661	1,456	2,011
Oman	50	582	248	467	1,024
Montenegro	635	557	808	1,075	978

Export of fresh apples in tons to top markets (2018-2022)

Export of fresh apples in tons (2018-2022)	2018	2019	2020	2021	2022
World	144,760	217,001	172,778	179,640	147,877
Russia	124,371	161,840	131,493	124,517	98,613
United Arab Emirates	130	3,510	4,786	5,940	8,941
Saudi Arabia	417	1,092	1,874	5,212	8,108
Great Britain	1,058	3,774	4,799	5,400	5,572
India			267	2,045	3,733
Qatar	18	729	838	1,862	2,174
Oman	76	742	323	663	1,212
Montenegro	2,202	1,957	1,945	2,735	2,464

Average annual prices of fresh apples trend 2018-2023

Average annual prices of fresh apples trend 2018-2023*	2018	2019	2020	2021	2022	2023
<i>World</i>	€ 0.59	€ 0.49	€ 0.64	€ 0.60	€ 0.69	€ 0.74
Russia	€ 0.63	€ 0.56	€ 0.70	€ 0.64	€ 0.70	€ 0.76
United Arab Emirates	€ 0.63	€ 0.73	€ 0.78	€ 0.82	€ 0.88	€ 0.85
Saudi Arabia	€ 0.68	€ 0.71	€ 0.78	€ 0.81	€ 0.84	€ 0.89
Great Britain	€ 0.63	€ 0.55	€ 0.56	€ 0.59	€ 0.64	€ 0.76
India			€ 0.81	€ 0.80	€ 0.82	€ 0.92
Qatar	€ 0.67	€ 0.80	€ 0.79	€ 0.78	€ 0.93	€ 0.94
Oman	€ 0.66	€ 0.78	€ 0.77	€ 0.70	€ 0.84	€ 0.96
Montenegro	€ 0.29	€ 0.28	€ 0.42	€ 0.39	€ 0.40	

Russia's share in exports 2018 – 2023

	2018	2019	2020	2021	2022	2023
Russian Federation	124,371	161,840	131,493	124,517	98,613	60,028
World	144,760	217,001	172,778	179,640	147,877	113,093
Share of Russia in exports 2018-2023 (% by volume)	86%	75%	76%	69%	67%	53%

Export of stone fruits to top markets in 2023

Export of stone fruits to top markets in 2023	000 EUR	Ton	EUR/kg
<i>World</i>	€ 40,393	47,138	€ 0.86
Russia	€ 9,987	6,776	€ 1.47
Romania	€ 4,501	4,790	€ 0.94
Bosnia and Herzegovina	€ 4,144	9,301	€ 0.45
Germany	€ 3,630	5,103	€ 0.71
Croatia	€ 2,652	2,941	€ 0.90
Montenegro	€ 2,678	3,632	€ 0.74
Poland	€ 4,884	3,331	€ 1.47
Austria	€ 1,280	2,322	€ 0.55
North Macedonia	€ 740	1,434	€ 0.52
Italy	€ 856	1,285	€ 0.67
Czech Republic	€ 703	1,130	€ 0.62

Export of stone fruits in 000 EUR to top markets (2018-2022)

Export of stone fruits in 000 EUR to top markets (2018-2022)	2018	2019	2020	2021	2022
<i>World</i>	€ 45,750	€ 40,583	€ 51,399	€ 45,952	€ 50,734
Russia	€ 34,875	€ 22,027	€ 25,799	€ 14,845	€ 21,551
Bosnia and Herzegovina	€ 1,222	€ 3,329	€ 3,916	€ 4,475	€ 5,750
Poland	€ 782	€ 1,489	€ 4,258	€ 3,170	€ 5,316
Germany	€ 2,820	€ 3,315	€ 4,314	€ 4,670	€ 3,328
Croatia	€ 534	€ 569	€ 2,451	€ 3,012	€ 2,821
Romania	€ 470	€ 2,343	€ 2,503	€ 4,901	€ 2,810
Austria	€ 1,744	€ 1,448	€ 1,359	€ 2,138	€ 1,905
Montenegro	€ 1,205	€ 1,970	€ 1,215	€ 2,174	€ 1,903
The Netherlands	€ 229	€ 90	€ 562	€ 995	€ 1,226
Slovenia	€ 310	€ 718	€ 910	€ 1,023	€ 798
Czech Republic	€ 188	€ 655	€ 1,105	€ 1,146	€ 703
Italy	€ 776	€ 428	€ 775	€ 584	€ 701
Switzerland	€ 132	€ 129	€ 166	€ 25	€ 511

Export of stone fruits in tons to top markets (2018-2022)

Export of stone fruits in tons (2018-2022)	2018	2019	2020	2021	2022
<i>World</i>	58,749	65,345	69,606	56,841	60,656
Russia	33,298	22,525	24,097	12,479	14,793
Bosnia and Herzegovina	3,579	9,015	9,175	10,419	13,141
Poland	660	2,252	4,254	2,742	4,327
Germany	8,183	7,609	9,187	7,166	6,440
Croatia	1,617	1,419	4,261	3,814	3,479
Romania	709	4,630	3,430	5,252	3,464
Austria	4,050	3,456	2,809	3,734	3,900
Montenegro	2,402	4,417	2,371	2,783	3,032
The Netherlands	267	197	608	855	972
Slovenia	662	1,400	1,516	1,429	1,158
Czech Republic	729	1,831	2,227	2,128	1,677
Italy	1,462	918	1,391	906	1,314
Switzerland	560	492	663	27	1,143

Trend of average annual prices of stone fruits 2018-2023* (EUR/KG)

	2018	2019	2020	2021	2022
World	0.78	0.62	0.74	0.81	0.84
Russia	1.05	0.98	1.07	1.19	1.46
Bosnia and Herzegovina	0.34	0.37	0.43	0.43	0.44
Poland	1.18	0.66	1.00	1.16	1.23
Germany	0.34	0.44	0.47	0.65	0.52
Croatia	0.33	0.40	0.58	0.79	0.81
Romania	0.66	0.51	0.73	0.93	0.81
Austria	0.43	0.42	0.48	0.57	0.49
Montenegro	0.50	0.45	0.51	0.78	0.63
The Netherlands	0.86	0.46	0.92	1.16	1.26
Slovenia	0.47	0.51	0.60	0.72	0.69
Czech Republic	0.26	0.36	0.50	0.54	0.42
Italy	0.53	0.47	0.56	0.64	0.53
Switzerland	0.24	0.26	0.25	0.93	0.45

Russia's share in exports 2018 - 2023

	2018	2019	2020	2021	2022	2023
Russian Federation	33,298	22,525	24,097	12,479	14,793	6,776
World	58,749	65,345	69,606	56,841	60,656	47,138
Share of Russia in exports 2018-2023 (% by volume)	57%	34%	35%	22%	24%	14%

Blueberry exports to top markets in 2023

	000 EUR	Ton	EUR/kg
<i>World</i>	33,455	6,014	€ 5.56
The Netherlands	15,490	2,822	€ 5.49
Russia	3,890	669	€ 5.82
Poland	6,149	1,103	€ 5.57
Germany	3,130	506	€ 6.18
Great Britain	1,300	279	€ 4.67
Saudi Arabia	644	96	€ 6.64
Switzerland	534	80	€ 3.58
Czech Republic	273	46	€ 6.00

Export of fresh blueberries in 000 EUR to top markets (2018-2022)

	2018	2019	2020	2021	2022
World	€ 3,982	€ 9,770	€ 17,839	€ 23,726	€ 27,070
Russia	€ 2,328	€ 3,223	€ 5,964	€ 3,664	€ 8,552
The Netherlands	€ 1,422	€ 5,700	€ 8,416	€ 12,948	€ 8,435
Germany	€ 19	€ 26	€ 1,337	€ 2,903	€ 3,521
Poland	-	€ 36	€ 1,082	€ 1,380	€ 2,486
Great Britain	-	€ 434	€ 672	€ 1,680	€ 1,921
Belgium	-	-	-	-	€ 557
Norway	-	€ 14	€ 24	-	€ 293
Austria	-	€ 85	€ 5	€ 179	€ 255

Export of fresh blueberries in tons to top markets (2018-2022)

	2018	2019	2020	2021	2022
World	743	1,647	3,189	4,365	4,920
Russia	440	565	974	619	1,438
The Netherlands	247	918	1,491	2,422	1,595
Germany	4	6	305	537	653
Poland	-	5	207	276	509
Great Britain	-	76	126	302	374
Belgium	-	-	-	-	98
Norway	-	2	3	-	35
Austria	-	25	1	27	38

Trend of average annual prices of fresh blueberries

	2018	2019	2020	2021	2022	2023
World	€ 5.36	€ 5.93	€ 5.59	€ 5.44	€ 5.50	€ 5.56
Russia	€ 5.29	€ 5.70	€ 6.12	€ 5.92	€ 5.95	€ 5.82
The Netherlands	€ 5.76	€ 6.21	€ 5.64	€ 5.35	€ 5.29	€ 5.49
Germany	€ 4.75	€ 4.33	€ 4.38	€ 5.41	€ 5.39	€ 6.18
Poland	€ -	€ 7.20	€ 5.23	€ 5.00	€ 4.88	€ 5.57
Great Britain	€ -	€ 5.71	€ 5.33	€ 5.56	€ 5.14	€ 4.67
Belgium	€ -	€ -	€ -	€ -	€ 5.68	
Norway	€ -	€ 7.00	€ 8.00	€ -	€ 8.37	
Austria	€ -	€ 3.40	€ 5.00	€ 6.63	€ 6.71	

Share of Russia in exports 2018-2023 (% by volume)

	2018	2019	2020	2021	2022	2023
Russia	440	565	974	619	1,438	669
World	743	1,647	3,189	4,365	4,920	6,014
Share of Russia in exports 2018-2023 (% by volume)	59%	34%	31%	14%	29%	11%

Frozen raspberry export trend by world markets (in million EUR)

,000,000	2018	2019	2020	2021	2022
World	220	242	299	446	427
Germany	64	70	90	118	106
France	38	40	41	68	92
Belgium	16	16	20	40	34
USA	11	9	22	44	33
Great Britain	17	16	20	24	22
Sweden	9	8	14	16	20
The Netherlands	11	12	13	23	18
Austria	7	7	8	15	18
Poland	11	18	14	25	16
Canada	8	7	15	17	13

Frozen raspberry export trend by world markets (in tons)

	2018	2019	2020	2021	2022
World	134,857	148,184	145,784	130,796	89,982
Germany	40,246	44,368	45,024	36,450	22,847
France	22,757	24,282	20,333	20,457	18,720
Belgium	8,602	9,221	9,299	11,332	7,214
USA	6,255	5,118	9,638	10,453	6,743
Great Britain	9,329	8,394	9,014	6,937	4,438
Sweden	3,566	3,682	5,534	4,691	3,592
The Netherlands	6,773	7,095	6,753	6,844	3,863
Austria	5,115	5,124	4,524	4,337	4,374
Poland	7,851	12,310	7,950	7,877	3,952
Canada	3,549	3,145	6,551	4,496	2,588

Export of frozen raspberries from Serbia in million EUR (projection for 2023.)

	Q4-2022	Q1-2023	Q2-2023	Q3-2023	2023
World	114	91	90	67	361
Germany	26	24	26	20	96
France	23	20	21	9	74
Belgium	8	8	8	5	29
USA	18	4	3	3	27
The Netherlands	5	5	4	3	18
Sweden	5	4	4	4	17
Great Britain	5	5	4	3	17
Poland	2	3	5	3	13
Austria	4	3	3	3	13
Canada	5	2	1	2	10

Export of frozen raspberries from Serbia in tons (projection for 2023)

	Q4-2022	Q1-2023	Q2-2023	Q3-2023	2023
World	24,493	20,835	22,537	20,568	88,432
Germany	5,796	5,884	6,901	6,120	24,701
France	4,739	4,426	5,024	3,567	17,757
Belgium	1,593	1,862	1,652	1,435	6,543
USA	3,652	905	874	891	6,322
The Netherlands	1,139	1,103	1,118	849	4,208
Poland	701	759	1,547	1,111	4,118
Austria	1,045	633	744	1,473	3,895
Great Britain	862	897	970	789	3,518
Sweden	827	722	707	719	2,975
Canada	1,036	552	258	404	2,250

Trend of average prices of frozen raspberries in export (EUR/kg) by years and markets in the last 4 quarters

	Q4-2022	Q1-2023	Q2-2023	Q3-2023
Svet	4.67	4.34	4.00	3.24
Nemačka	4.42	4.07	3.76	3.31
Francuska	4.94	4.60	4.11	2.62
Belgija	4.75	4.49	4.61	3.67
SAD	4.82	4.17	3.64	3.19
Holandija	4.76	4.52	3.92	3.74
Poljska	3.55	3.39	3.24	2.99
Austrija	3.92	4.09	3.63	2.18
V. Britanija	5.62	5.15	4.63	3.98
Švedska	5.91	6.01	5.83	5.38
Kanada	4.41	4.34	4.38	3.72



Top 10 destinations for Serbian fresh vegetables, in 000 EUR (2018-2023)

	2018	2019	2020	2021	2022	2023
World	105,156	113,507	104,971	113,794	132,733	138,253
Germany	13,666	15,821	17,386	21,436	19,034	22,590
Italy	8,228	6,920	10,594	10,978	13,404	14,642
Russia	18,108	19,896	16,847	14,928	12,496	12,167
Croatia	8,511	8,395	6,444	9,339	10,381	12,999
Montenegro	6,884	7,858	5,854	7,167	9,485	11,144
Bosnia and Herzegovina	7,316	9,215	7,452	7,005	9,206	10,381
Hungary	7,396	9,107	8,435	7,863	8,072	5,455
Turkey	45	124	31	53	7,699	-
North Macedonia	4,490	5,575	5,865	6,929	7,489	9,437
Romania	3,989	5,905	3,838	4,400	4,885	5,931

Top 10 categories of frozen and fresh vegetables exported by Serbia (000 EUR, 2018-2023)

	2018	2019	2020	2021	2022	2023
Frozen vegetables	56,506	52,325	43,672	46,284	52,636	46,823
Dried vegetables	19,301	19,273	25,812	29,672	31,202	32,083
Other vegetables, fresh or chilled	14,677	17,931	18,018	18,207	18,455	23,477
Cucumbers and gherkins, fresh or chilled	9,049	9,898	11,362	16,188	10,163	9,602
Onion, fresh or chilled	5,644	6,917	3,936	4,405	7,600	10,364
Tomatoes, fresh or chilled	6,453	5,224	2,827	4,331	5,117	5,578
Carrots, beets, celery and similar edible roots, fresh	7,050	7,559	5,319	5,632	4,955	8,304
Salads, various types, fresh or chilled	1,326	1,619	2,412	1,910	2,176	3,337
Temporarily preserved vegetables, e.g. pickled	963	719	2,482	2,053	2,075	3,150
Cabbage and other cruciferous vegetables	1,701	1,798	1,118	902	1,611	1,846

Trends in the export of pickled gherkins from Serbia

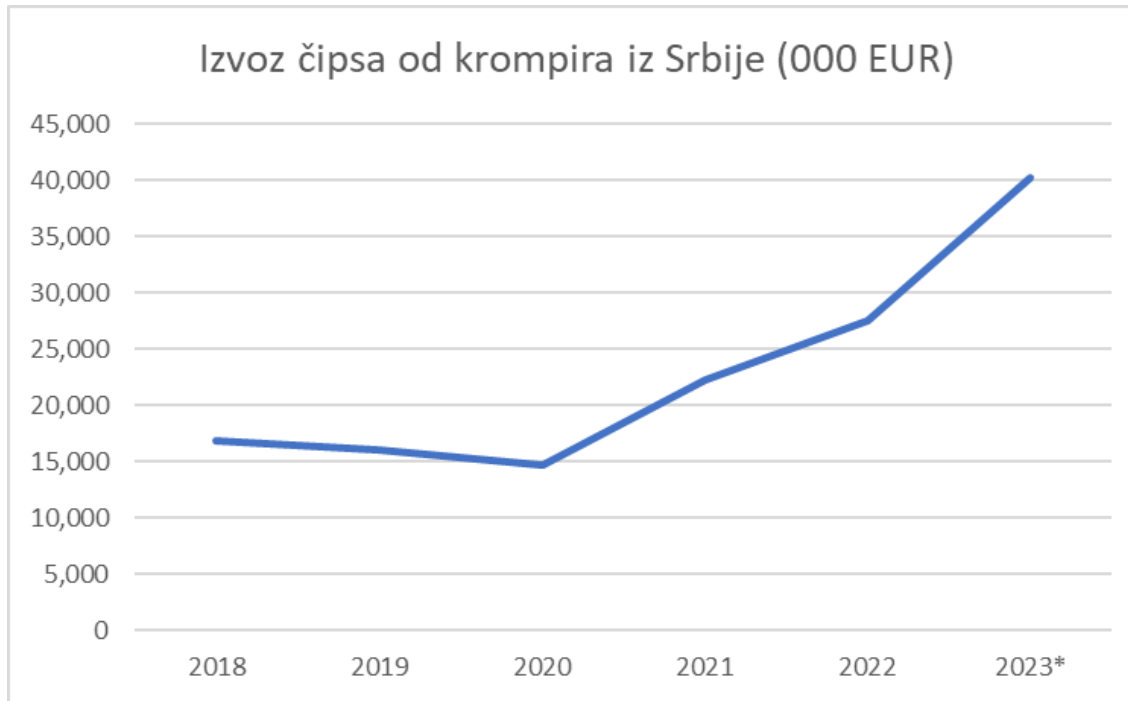
000 EUR	2018	2019	2020	2021	2022	2023
Pickles, gherkins	2,445	4,085	3,911	4,912	7,609	9,226

Ton	2018	2019	2020	2021	2022	2023
Pickles, gherkins	3,606	5,509	4,848	6,247	7,657	8,219

	2018	2019	2020	2021	2022	2023
Average annual prices in the export of pickles	€ 0.68	€ 0.74	€ 0.81	€ 0.79	€ 0.99	€ 1.12

Export of potato chips from Serbia (000 EUR)

	2018	2019	2020	2021	2022	2023
Export of potato chips from Serbia (000 EUR)	16,835	16,028	14,720	22,222	27,450	40,139



Thank you for your attention!