



Vladimir Pekic
freelance journalist

Outlook of Serbian and Polish raspberry sectors

Presentation contents

Part 1:

- Foodnews

Part 2:

- Background of Serbian and Polish raspberry sectors

Part 3:

- 2015 season forecasts for Serbia and Poland

Part 4:

- Outlook



Part 1: Foodnews

FOODnews®

Part of the **agra-net.net** Family | [About Us](#) | [Advertise](#) | [Welcome vpekic@gmail.com](#) | [My Agronet](#) | [Email Alerts](#) | [Change Password](#) | [Logout](#)



FOOD
news



[Advanced Search](#)

[Home](#) | [Beverages](#) | [Canned](#) | [Frozen](#) | [DFN](#) | [Raw Material](#) | [Tomato Products](#) | [Analysis](#) | [Data](#) | [PDF Library](#) | [Resources](#) | [Subscribe](#) | [Help](#)

Did you know? All the data in our coverage can be downloaded in Excel format from the Data Library. [Click here to access it](#)



Download here all our Market Reviews supplements, including the latest Global Outlook 2015. ALSO AVAILABLE TO NON SUBSCRIBERS



[Click here to download your latest FOODNEWS weekly briefing.](#)



HOME

Greek peach harvest looking short

14 August 2015 - By FOODNEWS staff



v.agra-net.net/agra/foodnews/

Kraft Heinz to slash head count in north America

14 August 2015 - By Davide Ghilotti

The newly-formed Kraft Heinz Company will reduce its total workforce of 46,000 by 2,500 staff, as part of the merger between the two former firms.

DFN crops vary markedly from 2014 volumes

14 August 2015 - By Julian Gale

Several of the global dried fruit and nut crops are showing "remarkable"

Most Read

UPDATED: Costa Rica lacks fresh pineapple for freezing

Cheap apples for Chinese early season processing

Tomato processing under way in most of Europe

Washington expects another big apple crop

Poland expects another massive apple

FOODnews[®]

- Agricultural engineer, plant geneticist (MSc), worked in genebank, now journalist
- I am a Foodnews freelance correspondent and that my opinions do not necessarily represent Foodnews
- FOODNEWS is the only global report that covers processed food commodities.
- Read by decision makers in over 80 countries, FOODNEWS covers fruit juices and concentrates, canned, dried and frozen fruits and vegetables, canned tomatoes, tomato paste, nuts and related raw material markets.

FOODnews[®]

- FOODNEWS gives up-to-the-minute information on prices, crops, harvests, markets, imports, exports and production of these key food products, and is required reading for all manufacturers, processors, importers, exporters and traders.

FOODnews[®]

- Features include:
- Interactive online price graphing tool
- Expert advice from the Ask the Analyst services
- Online archive of over 20,000 articles
- Price data
- www.foodnews.co.uk



Part 2: Background

Serbia

FOCUS ON AGRICULTURE

Advantages



Serbia has always been primarily an agricultural economy.

The country has 4.2 million hectares of arable land.

However, only 246,000 hectares are devoted to orchards.

Advantages include:

- good climate conditions
- proximity to EU market
- today Serbia shares border with 4 EU countries (Croatia, Hungary, Romania and Bulgaria)



EU candidate

Serbia

RASPBERRY POWERHOUSE

Frozen fruit exporter



Around 85% of raspberry production is intended for export, mainly frozen in bulk.

Serbia is a global leader in the export of frozen raspberries with \$232 million exported in 2013.

Serbia is the largest provider of frozen fruit to the French and German market, and the second largest to the Belgium market in 2013.

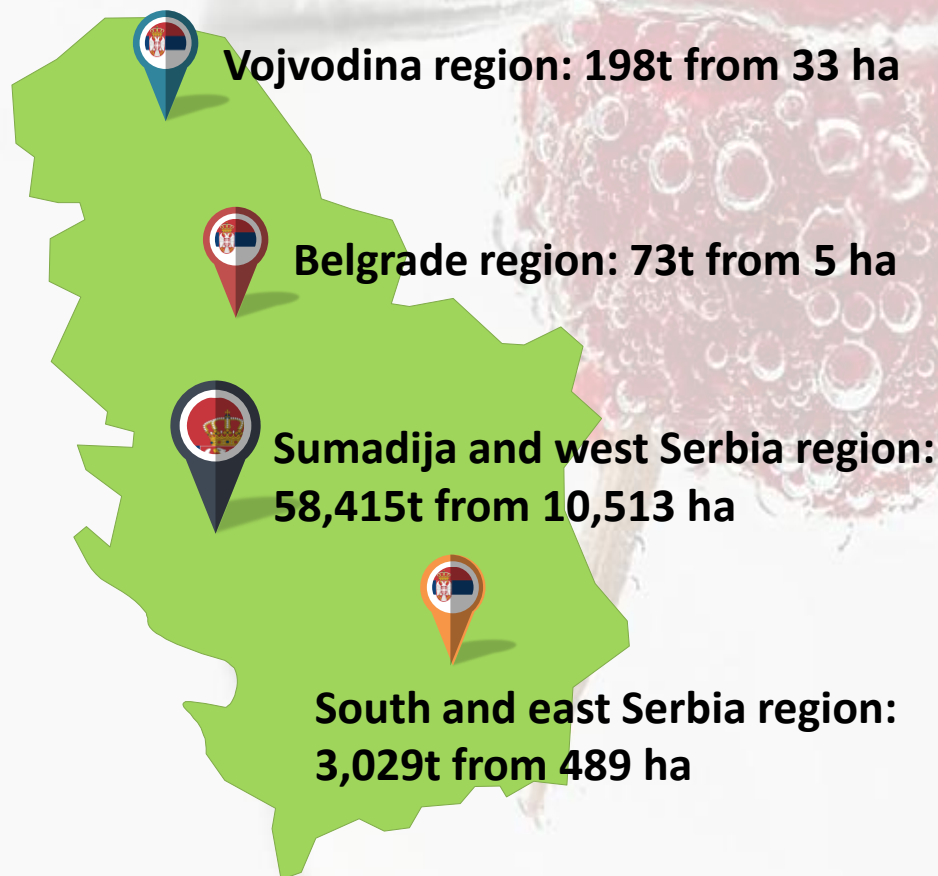


EU candidate



Serbia

TOTAL - 61,715 tonnes from 11,041 hectares



2014 raspberry season



The frozen fruit is sold on world markets as four principal products:

- IQF raspberry whole- 45-60%,
- IQF whole and broken 5-20%,
- IQF raspberry crumble 30-45% and
- IQF raspberry block <5%

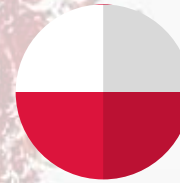


EU candidate

Poland

THE PLAYER TO WATCH

Leading EU player



Poland is the largest producer of raspberries in the European Union.

The Polish agri-food sector is most developed in terms of number of companies and the value of sold production in Central and Eastern Europe (CEE).

High level of industry compared to other CEE countries.

50 Polish companies in Top 100 ranking of largest food companies in Central Europe



EU member state

Poland

DYNAMIC GROWTH

Production doubles in 10y!



Soft fruit crop is dominated by deliveries for processing (ca. 70-75% of production).

Raspberry production booming:
65,000 tonnes in 2005,
92,900 tonnes in 2010.
118,000 tonnes in 2011
127.100 tonnes in 2012
121,000 tonnes in 2013
125.900 tonnes in 2014

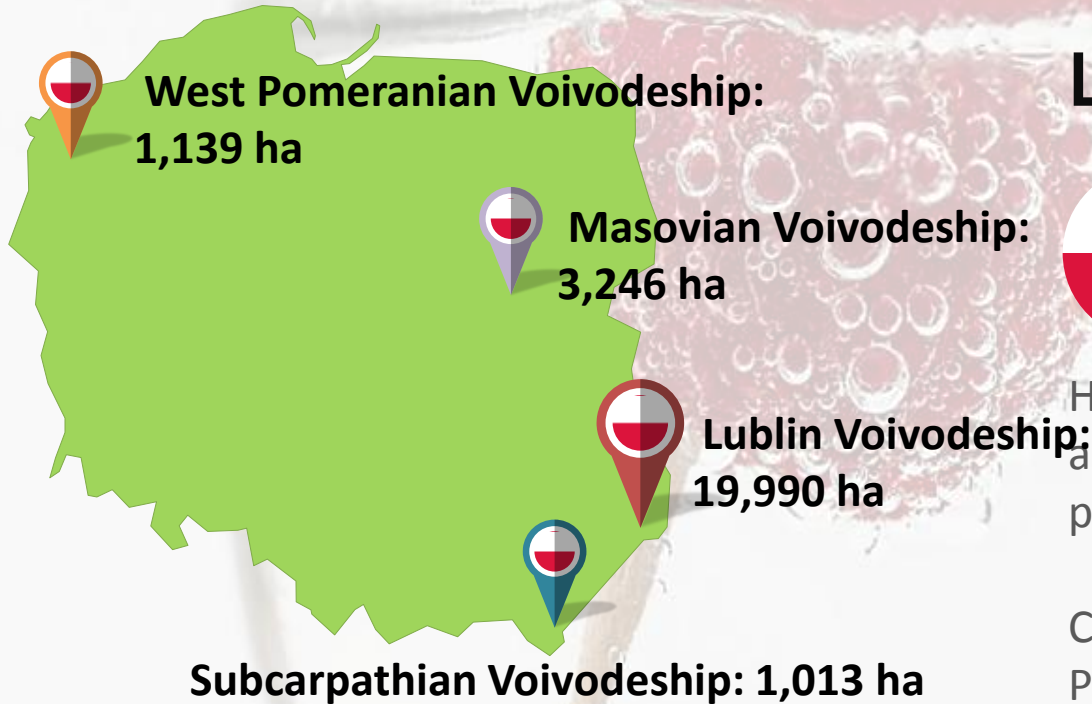


EU member state

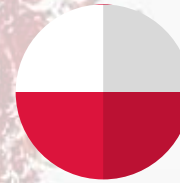
Poland



TOTAL - 28,823 hectares



Leading EU player



Almost 100% of the raspberry production is based on private farms.

Harvests now exceed 120,000 tonnes and most fruit, mainly in the processed form, are exported.


Consumption of raspberries in Poland increased recently.

The most popular cultivars include: Polana, Polka, Koral, Benefis, Willamette, Malling Seedling...

Harvest after Serbian, lower transport costs



EU member state



Part 3: 2015 season forecasts

2015 season forecasts - Serbia

Institution

1. **Srpska Malina raspberry growers' association**

Harvest forecast (t, ha)

- Serbia's raspberry production is set to stay **unchanged** from 2014 at around **65,000 tonnes** (**MAY 2015**)
- volume of production and fruit quality will be similar to last year's

2015 season forecasts - Serbia

Institution

2. Coldstores Association of Serbia (UHS)

Harvest forecast (t, ha)

- Serbia's raspberry production is set to stay **unchanged** from 2014 at around **86,000 tonnes** (**JUNE 2015**)
- Hailstorms this year damaged or destroyed between 8% and 10% of the raspberry crop in Serbia
- quality of the raspberry crop will be better than in last year's season
- FOODNEWS notes that Serbia's production was estimated by IRO at a **lower 77,000 tonnes for 2014.**

2015 season forecasts - Serbia

Institution

**3. Statistical Office of Serbia
in (RZS)**

Harvest forecast (t, ha)

- Serbia's raspberry production is set to rise 7.2% to **66,176 tonnes** (EARLY JULY 2015)
- average yield of 5,993 kg per ha
- raspberry acreage for this year remains unchanged at **11,041 hectares**.

2015 season forecasts - Serbia

Institution

4. Fruit Research Institute (FRI) in Cacak

Harvest forecast (t, ha)

- very low relative air humidity and windy conditions can cause necrosis or destruction of leaf mass (**LATE JULY 2015**)
- problems visible with first-year bearing raspberry varieties, such as Polana and Polka

2015 season forecasts - Serbia

Institution

4. Fruit Research Institute (FRI) in Cacak

Harvest forecast (t, ha)

- warns heat wave in the Balkans leads to “drastic consequences visible on raspberries” (LATE JULY 2015)
- Serbia received between 25% and 75% [depending on region] of the average rainfall expected in the past 30 days, said the Hydrometeorological Service of Serbia on July 27.

2015 season forecasts - Serbia

Institution

**5. Serbian Chamber of
Commerce (PKS)**

Harvest forecast (t, ha)

**≈ 66,000 tonnes, ≈ 11,000
hectares (AUGUST 2015)**

2015 season forecasts - Serbia

Institution

- **Foodnews**

Harvest pricing

- Serbian IQF Willamette raspberry wholes are priced at an average €2.60 per kg ex-works, while Serbian IQF Willamette raspberry crumbles are around €2.10/kg ex-works. (July 2015)
- rates are 7% below July last year in the case of wholes, and 5% for crumbles

2015 season forecasts - Poland

Institution

1. Foodnews

Harvest forecast (t, ha)

- Poland has yet to release its expectations for its crop, which started with the harvesting of its summer varieties. (JULY 2015)
- visible with first-year bearing raspberry varieties, such as Polana and Polka - reduction of fruit size and quality, including a mass appearance of white spots and burns on the tip and sun-exposed sides of raspberries.

2015 season forecasts - Poland

Institution

2. Central Statistical Office of Poland (GUS)

Harvest forecast (t, ha)

- This year's production of raspberries will also be lower than last year's (over 4%) **(AUGUST 13) * exclusive**
- Poland produced 125,900 t in 2014 – so this means that the 2015 crop is estimated by GUS to be 120,000 t
- “This is the only one forecast for this crop for 2015”.

2015 season forecasts - Poland

Institution

3. Fresh-market.pl

Harvest forecast (t, ha)

- Drought and hot weather in Poland is negatively affecting the size and quality of harvested raspberries (EARLY AUGUST)
- At the beginning of the summer season forecasts indicated a good harvest and generally a decline in prices of raspberries, but no one imagined that virtually the entire summer it would not rain.

2015 season forecasts - Poland

Institution

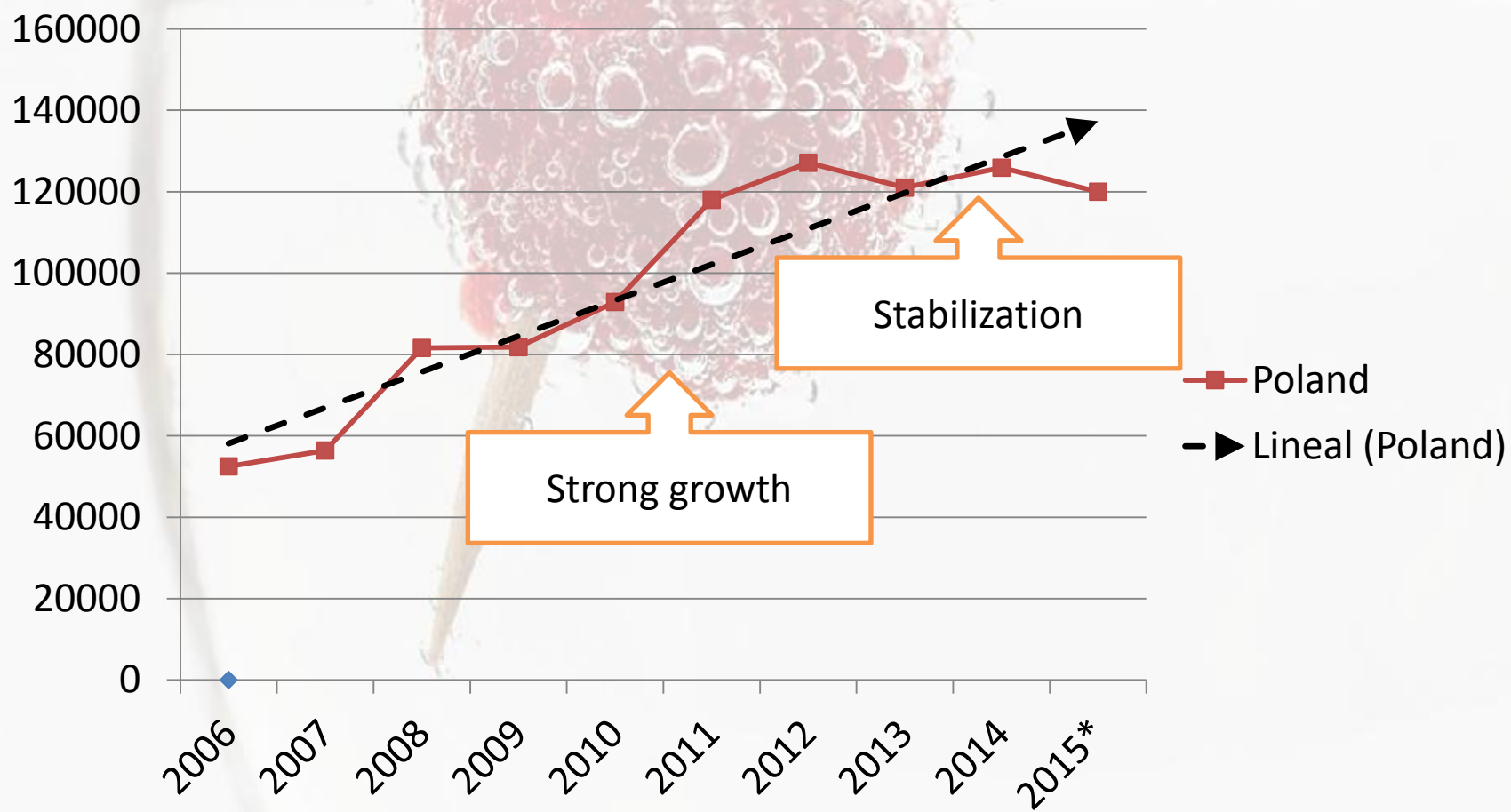
3. Fresh-market.pl

Harvest forecast (t, ha)

- Autumn Polka fruit currently the most sought-after first-class raspberry is being sold at PLN5.80-6.20 (\$1.54-1.65) per kg.
- Other varieties in the same class are being purchased for PLN5.70-6.00 (\$1.52-1.60) per kg.
- Second class raspberries are traded for PLN5.50 - 5.70 per kg.

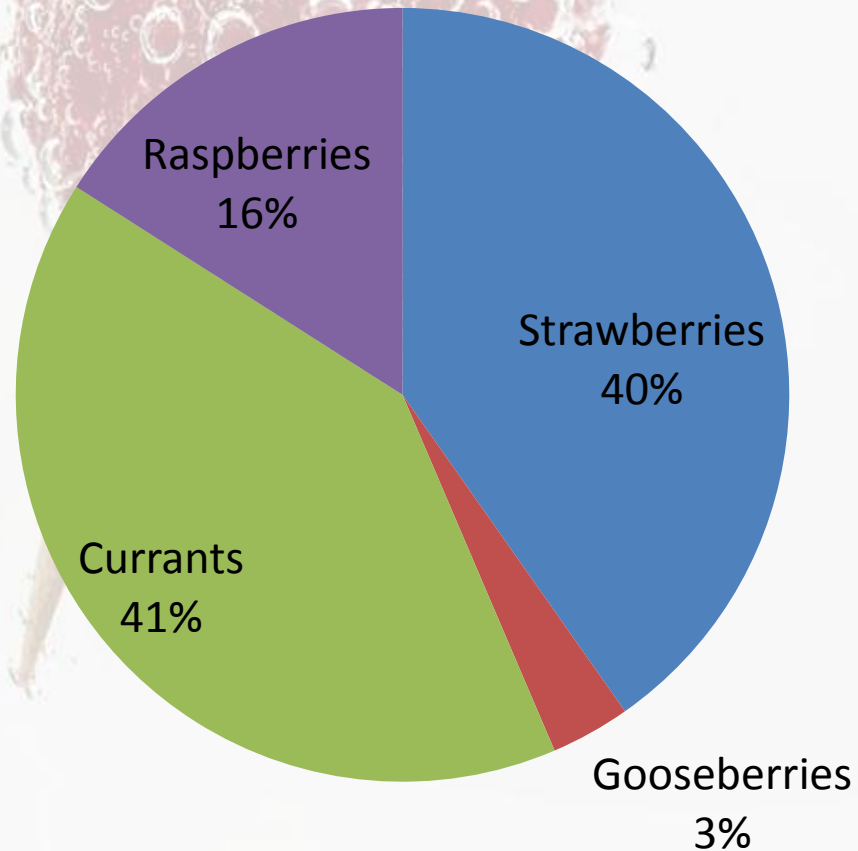
Part 4: Outlook

Ten-year production – official stats Poland



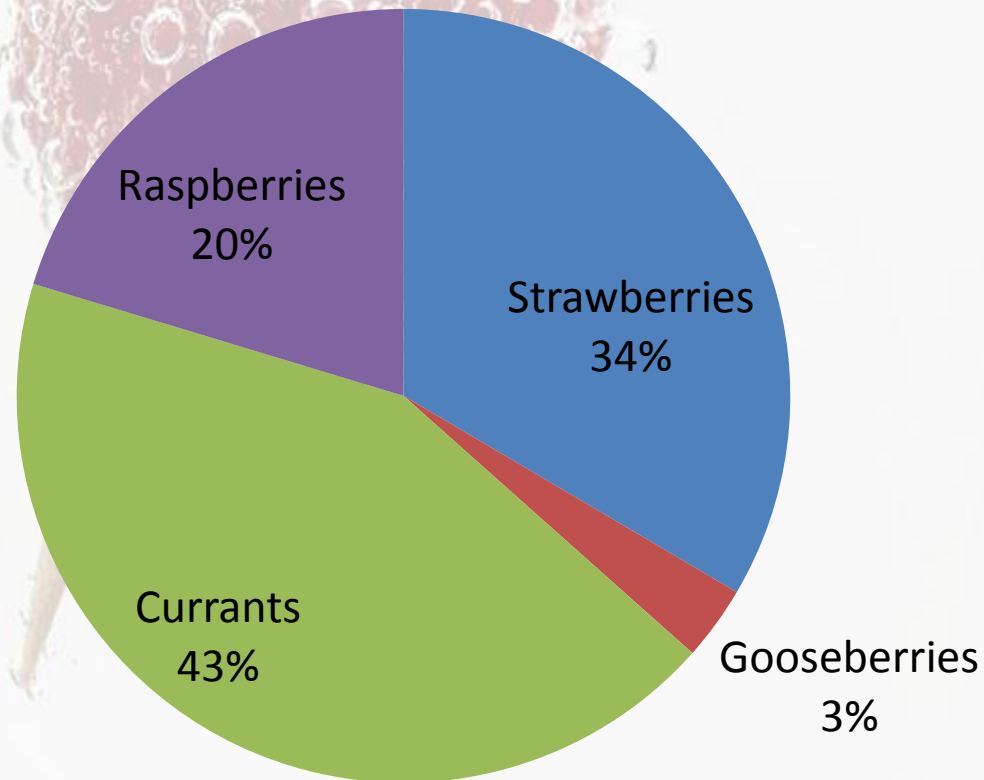
Relative share of raspberry production **growing** in Poland

Poland 2006-10 (raspberries **16%**)



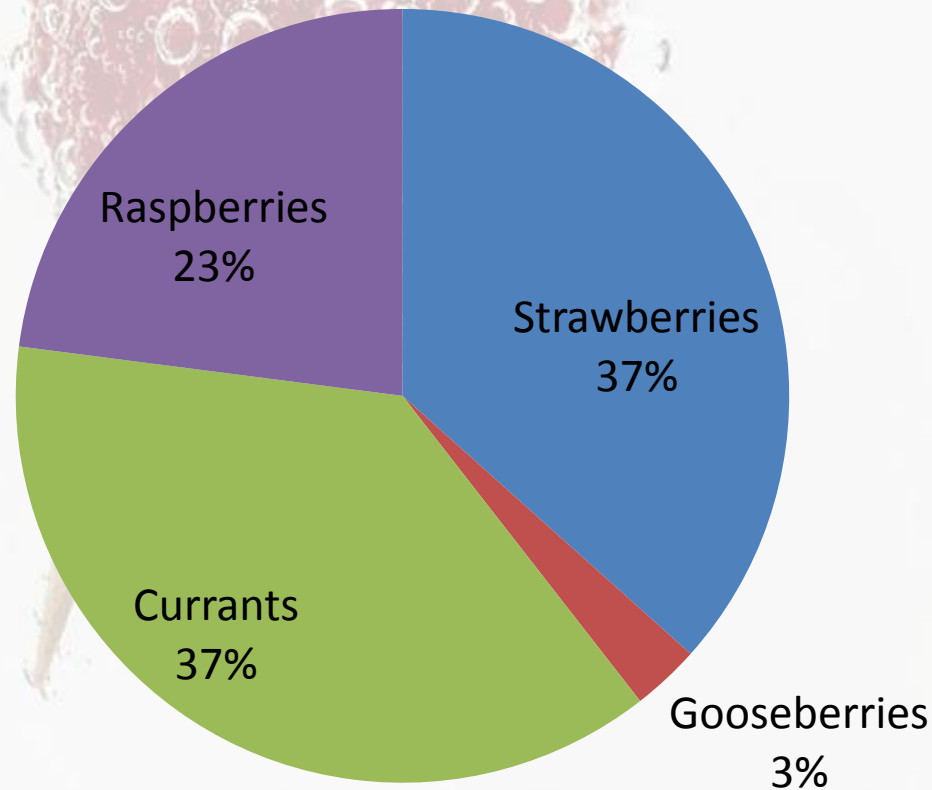
Relative share of raspberry production **growing** in Poland

Poland 2010 (raspberries **20%**)



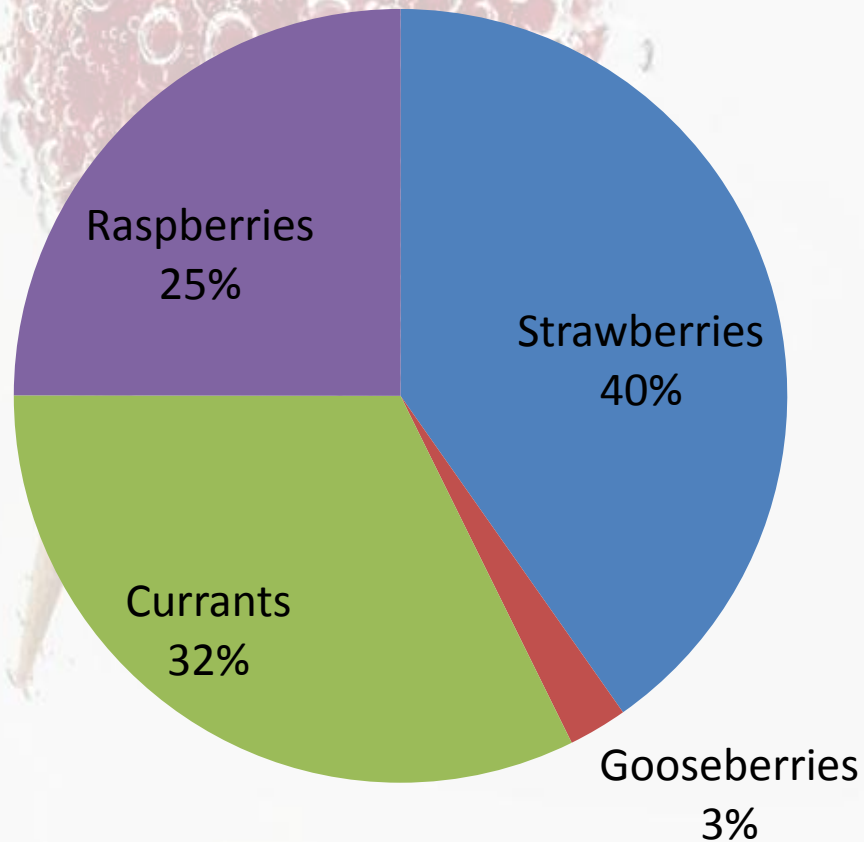
Relative share of raspberry production **growing** in Poland

Poland 2013 (raspberries **23%**)



Relative share of raspberry production **growing** in Poland

Poland 2014 (raspberries **25%**)



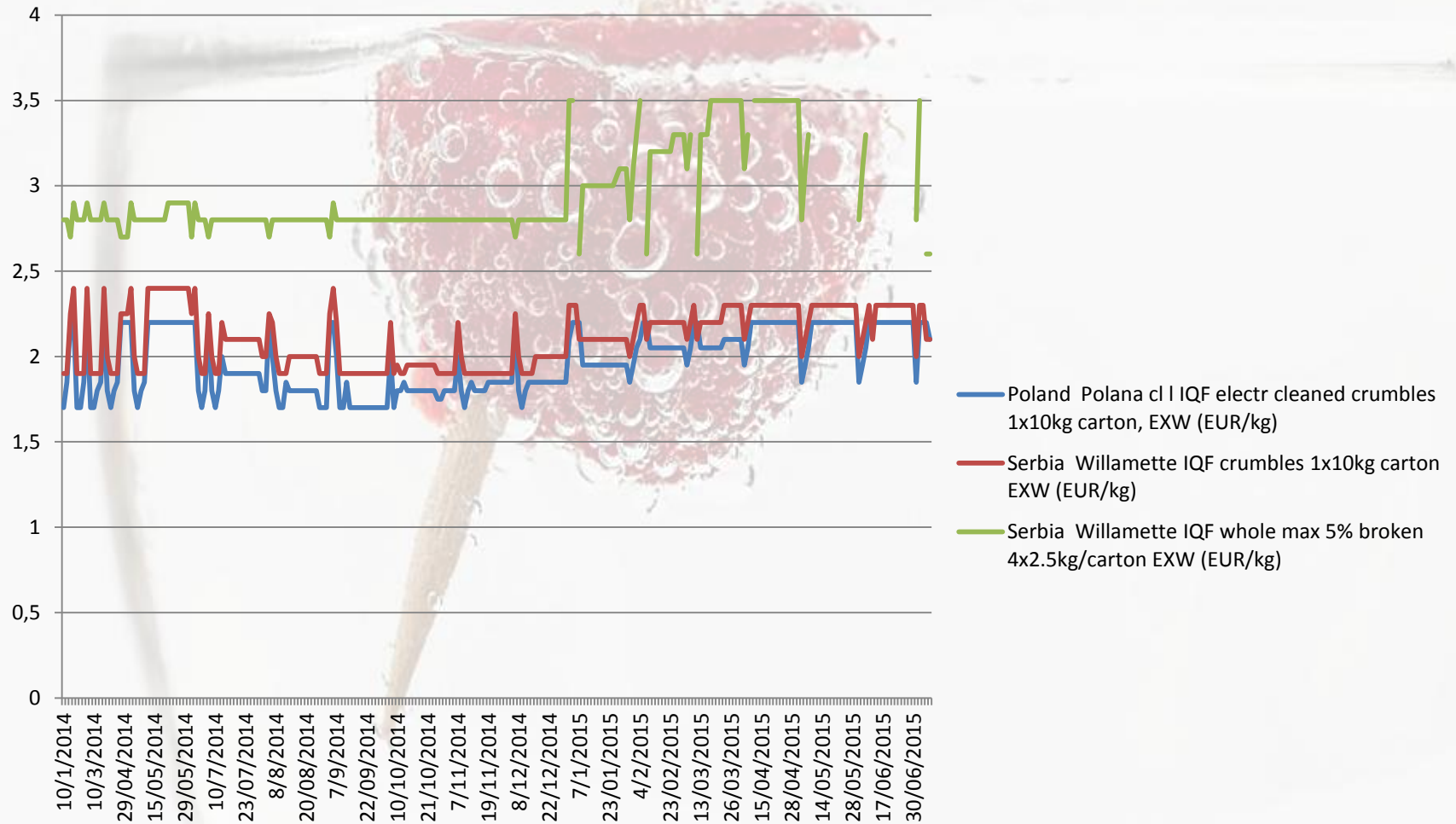
Structure of Polish varieties

- 1. Summer varieties (week 26 until 32)**
 - 2. Autumn varieties (week 33 until 43)**
-
- 1. Varieties include Willamette, Malling Seedling, Benefis, Canby...**
 - 2. Polka, Polana...**

Boom in production - Poland

- **Long harvesting period beneficial for growers**
- **Customer demand on the rise due to health benefits**
- **Easy establishment of new plantations**
- **Customers are located close – same continent**
- **Challenge – how to address issue of mechanical harvesting?**

Raspberry prices 2015



What is happening in Serbia ?

- Is production is falling?
- Is production stabilizing at new lower levels?
- Is production is increasing?



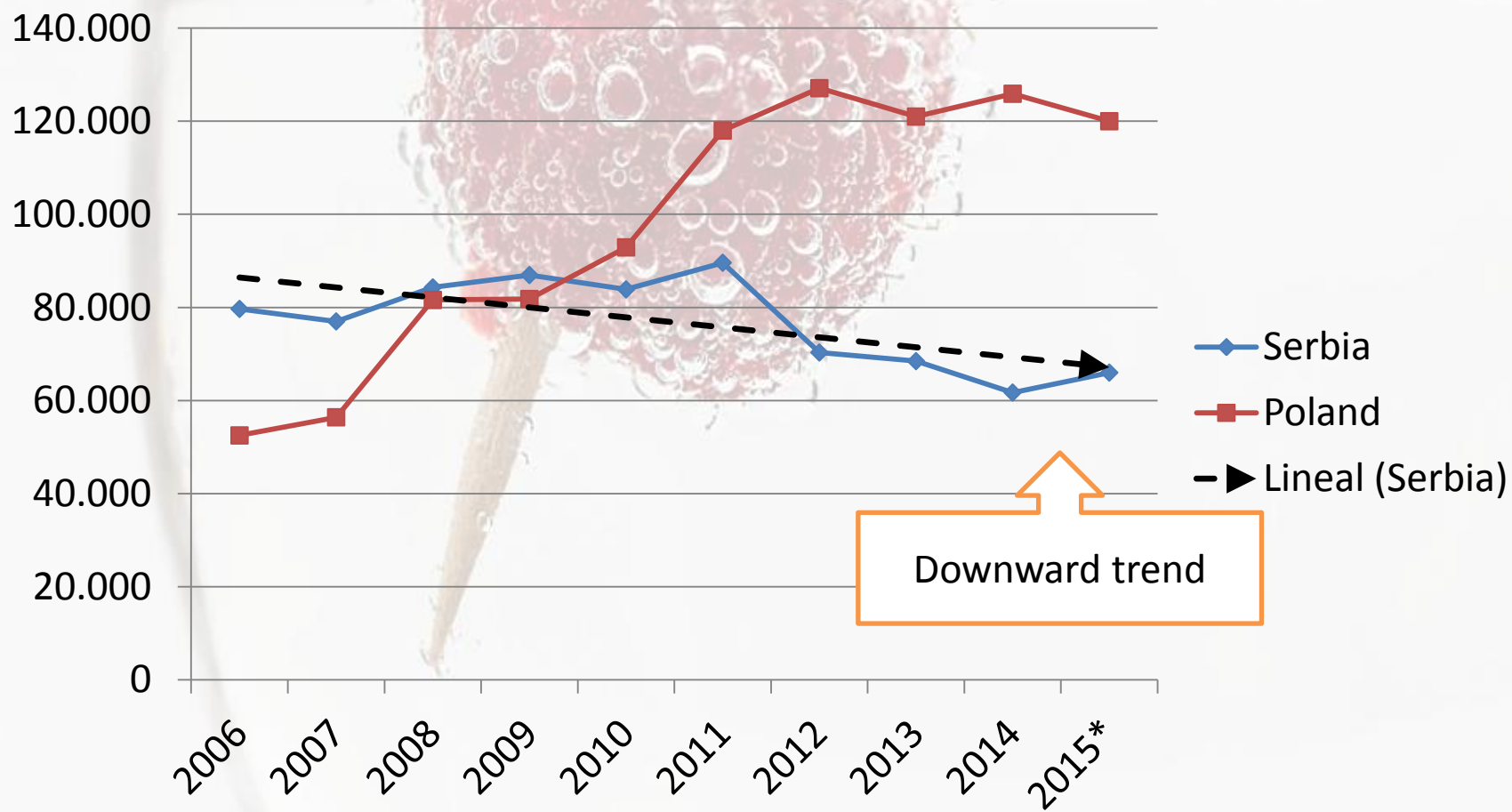
Tip of
the
Iceberg

What is
happening
under the
surface?

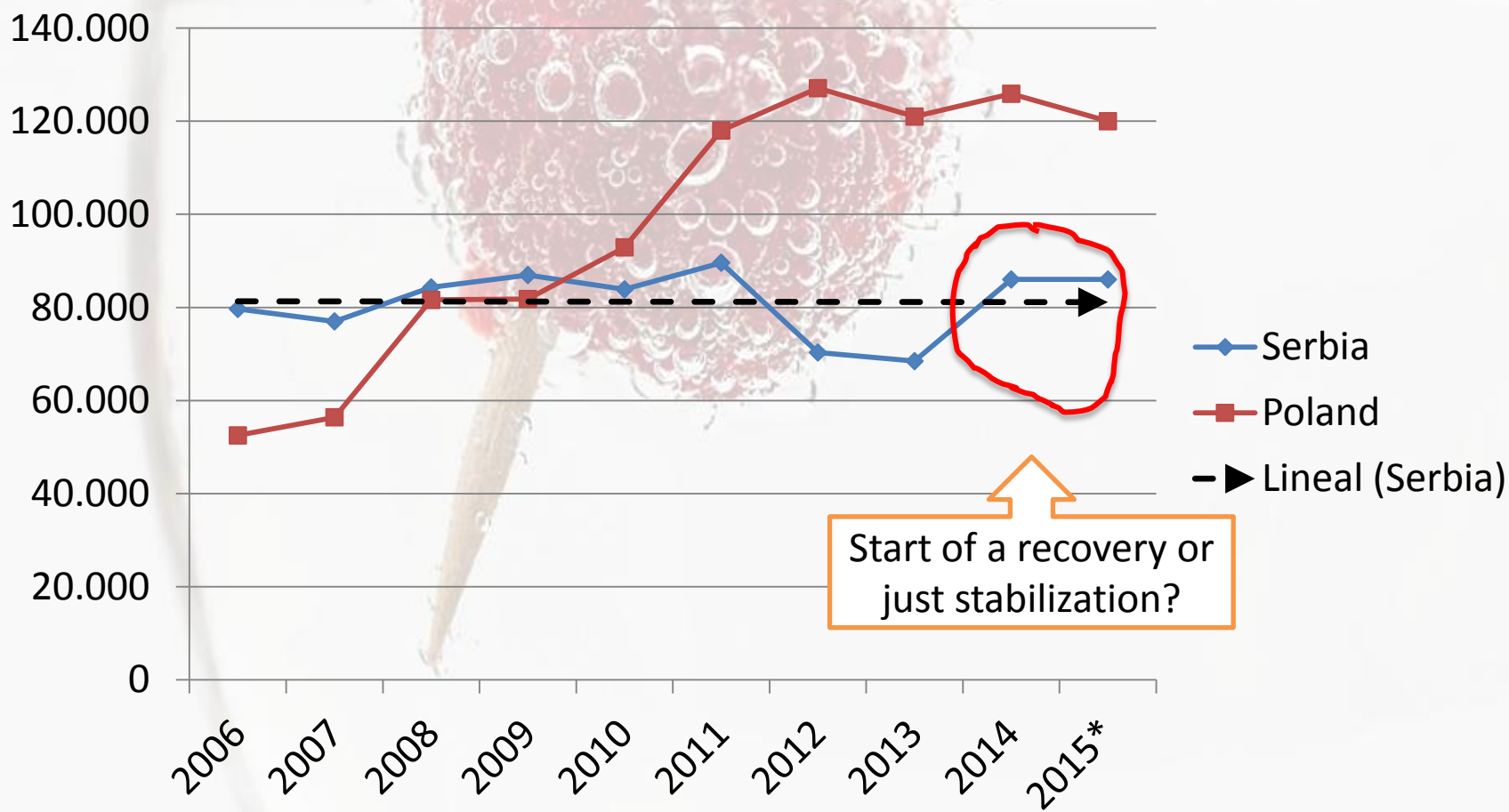
Structure of Serbian varieties

- **Most raspberry growers rely on the Willamette variety – 90% share**
- **Meeker increasingly popular**
- **Autumn raspberry varieties such as Polka, Polana, Tulameen are gaining ground slowly, as growers start to diversify**

Ten-year production – official stats Serbia



Official stats Serbia + stats from Serbian coldstores association for 2014/15



Who is the reliable source in Serbia?



Problems exist – regardless of stats

- There is a need for a verifiable harvest estimate in Serbia – that all stakeholders agree on
- The precise methodology of forecasting should be transparent
- Coldstores and growers should avoid using forecasts as a tool in domestic pricing negotiations

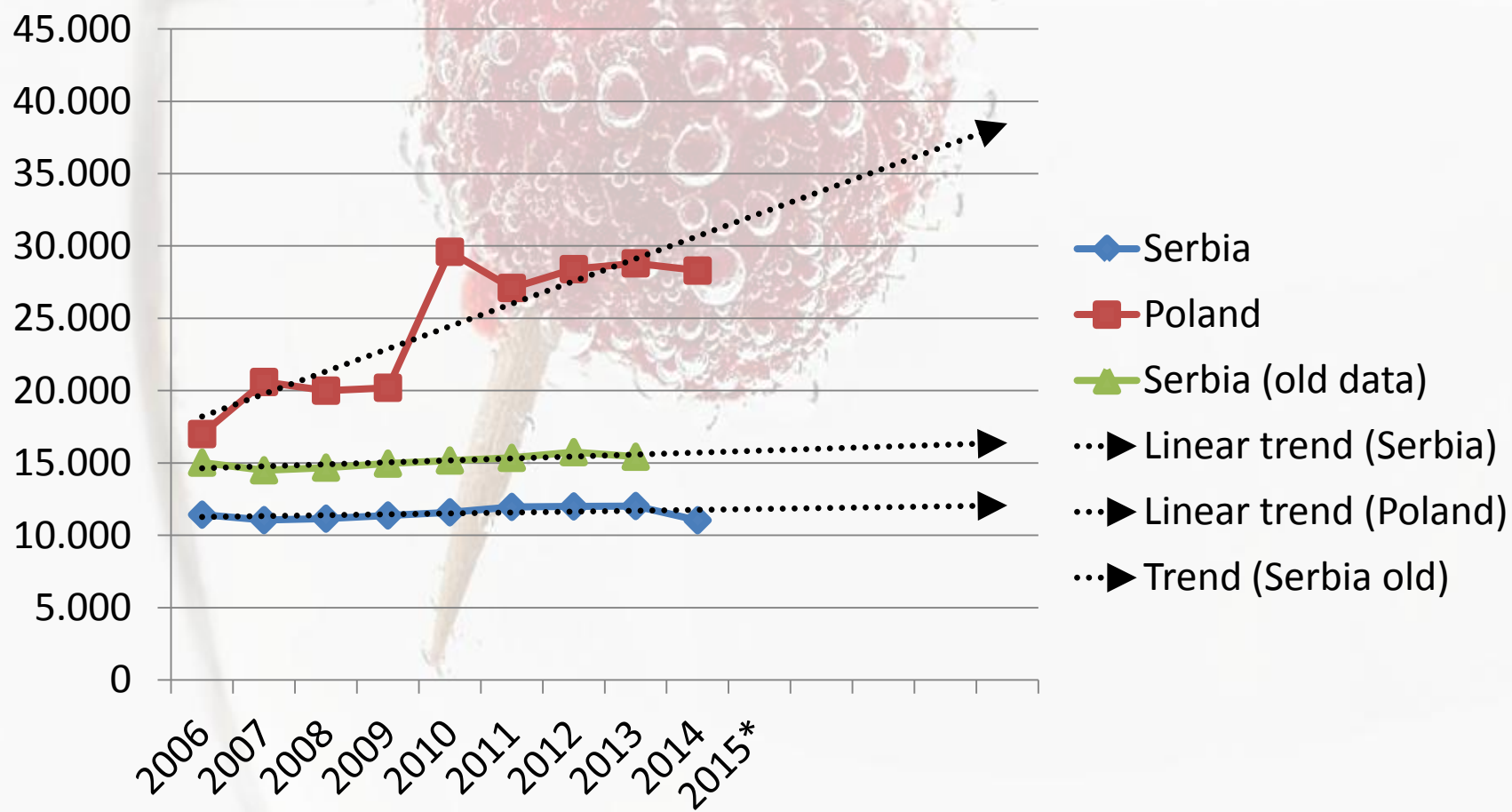
Important - official statistics upgraded

- The Council of the EU approved opening negotiations on Serbia's accession in January 2014
- Serbia's 2012 agriculture survey conducted with new methodology, which was the "largest agricultural survey ever" in the country.
- "Statistical methodology and data collection methods in Serbia are being harmonized with Eurostat standards.
- Statistical data on acreages under raspberries now reflect information collected in the new agriculture survey," said RZS official Slobodan Grujic to Foodnews.

Official statistics upgraded in Serbia

- Serbia's raspberry acreage has fallen dramatically to **11,041 hectares in 2014**, down 28.45% from 15,433 ha in 2013, said Statistical Office of Serbia in 2014.
- The only time raspberry acreage went below 14,000 ha was in 2000 when it amounted to 13,519 ha. In the past four years, the acreage was consistently above 15,000 ha.
- **This was a statistical correction – not a sudden drop in acreage!**
- Now the past acreage has been revised downwards by RZS for all the years between 2005-2014!

Official stats Serbia & Poland – acreage (ha)

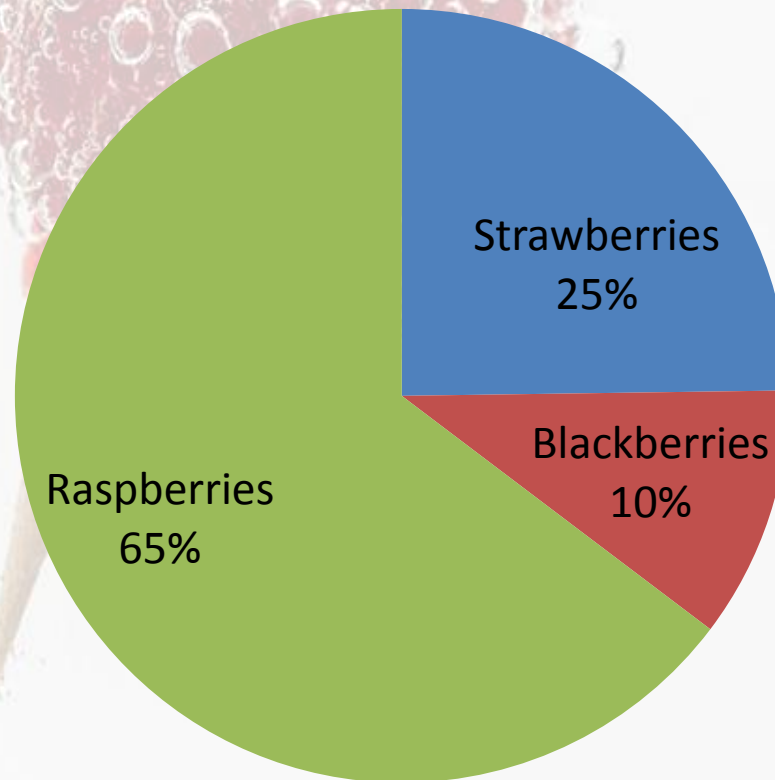


What is happening in Serbia?



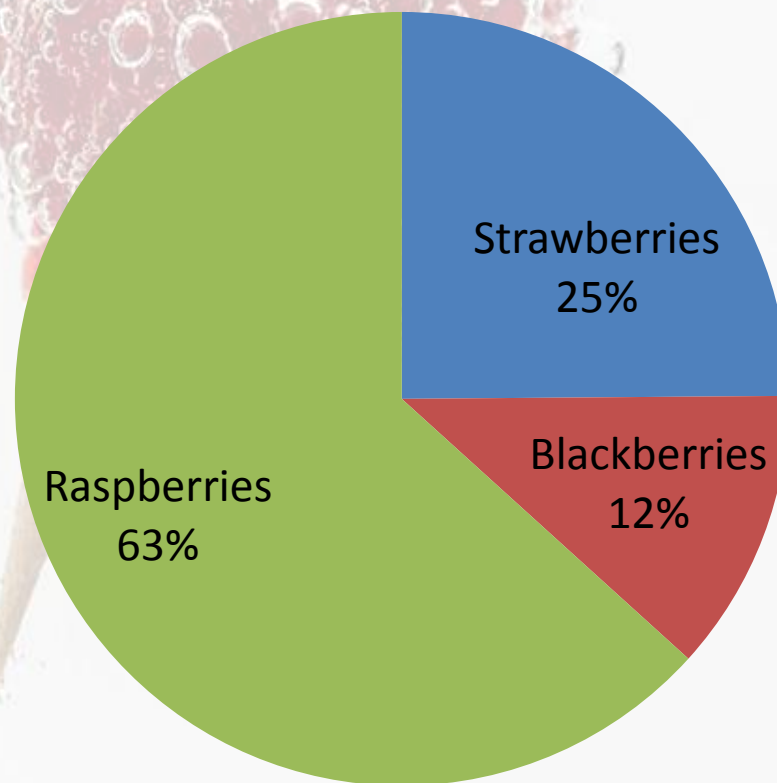
Relative volumes of berry production (t) in Serbia

Serbia 2005 (raspberries 65%)



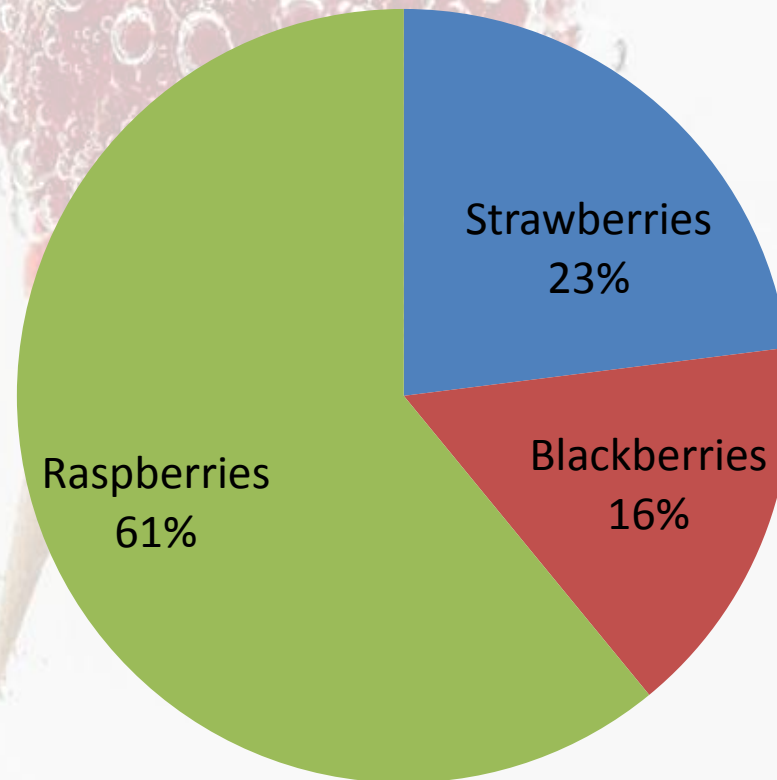
Relative volumes of berry production (t) in Serbia

Serbia 2010 (raspberries 63%)



Relative volumes of berry production (t) in Serbia

Serbia 2014 (raspberries 61%)



Roots of problems in Serbia

- When things are going well – there is no need for deep soul-searching
- *All* happy families (*raspberry producing countries*) are alike; each unhappy family (*raspberry producer*) is unhappy in its own way - Tolstoy
- Serbian raspberry family has specific problems it has to address!

Problems in Serbia's raspberry sector

production 1/3

- Poor structure of raspberry varieties
- Investigations have confirmed the presence of the newly discovered “blotch” raspberry virus (RLBV) in Serbian raspberry fields
- Serious problems in recent years with infected raspberry plantlets imported from abroad, because of inadequate inspection procedures on the Serbian border
- Problem detected in 2005 when FRI surveyed all registered and unregistered nurseries - more than 50% of the seedlings were infected.

Problems in Serbia's raspberry sector

2/3

- Detection of raspberry root cancer in Arilje region initially and since then it has spread to surrounding areas.
- Raspberry growers often opt to expand acreage under the crop, instead of improving crop cultivation technology
- Serbian raspberry growers expand their raspberry farms but often select unsuitable land plots for raspberry cultivation

Problems in Serbia's raspberry sector

3/3

- Production of raspberries still very atomized as it relies mostly on small farmers – manual harvest
- Very low levels of crop insurance coverage
- Raspberry production mostly non-irrigated (95%) and most land plots do not have hail protection systems in place
- Proliferation of raspberry growers' associations – often regional, but poor inter-coordination
- Lack of coordination/cooperation among all stakeholders!



El Fin



Gracias por su atención

Vladimir Pekic, freelance journalist

Tel: +381 64 277 8 288

Email: vpekic@gmail.com

Foodnews www.foodnews.co.uk

Fax: +39 06 233 122 10

Belgrade, Serbia