

Raspberry market: between European shortage and North American surplus

The global raspberry season is showing a mixed picture. While Europe and North Africa are dealing with climate and logistical shocks that squeeze supply and push prices up, North America is facing record volumes that are weighing on prices.

BY HÉLÈNE SAUVAGE (Source: Freshplaza)

In Europe, summer heatwaves are having a seriously detrimental affect on yields and causing real supply tensions. In France, availability is limited after the mid-August heat in the South-West. To make up for this shortage, raspberries grown under cover were averaging €17.20/kg at the shipping stage by mid-August. Even though production is gradually picking up with cooler temperatures returning, prices are staying firm. At retail, the average price is reaching €25.94/kg for French raspberries, compared to €23.42/kg for imports.

In the Netherlands, supply plummeted in July. The extreme heat (> 30°C) stressed the plants, causing shortages. In Germany, strong early-season sales were slowed in the South by the heatwave which disrupted deliveries, pushing prices up.

In Italy, despite slight drops in yield due to the heat, the quality is good. In Spain, Huelva (which accounts for 90% of the national supply) is keeping up a continuous harvest thanks to everbearing varieties. Despite winter storms, production went up by 5% (39,545 t). Nonetheless, its export value fell by 3% (€222.7M), hit by Moroccan competition and the lack of irrigation infrastructure..

Morocco facing the logistics challenges

In Morocco, the campaign ended early after winter storms in the North and a post-Eid labour shortage. On the commercial side, transport costs blocked access to the Gulf market. Logistics delays at the Algeciras port affecting quality led producers to opt for freezing. Fresh exports fell by 7% (59,149 t) while frozen exports jumped by 19% (15,452 t).



© H. Sauvage

A two-speed market: the raspberry sector faces sharp contrasts between Europe and North America.

North America marked by abundance

On the other hand, fruit is plentiful in North America, which puts pressure on prices. In Mexico, the expansion of areas in Baja California and the arrival of more productive varieties have greatly boosted shipments. In California, a mild winter sped up ripening, causing overlapping harvest windows and record volumes compared to the previous year. This massive supply keeps prices under pressure, despite a recovery in availability for the peak of the season. 

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Global **Strawberry** Market: High Tension from Climate and ompetition

The 2026 strawberry season in the northern hemisphere is marked by extreme weather and rising costs. While demand remains strong, producers are confronting volatile markets and a global competition that is constantly changing.

BY HÉLÈNE SAUVAGE (Source: Freshplaza)

In Europe, heatwaves have disrupted production, affecting quality and profitability.

In Italy, strawberries are standing out as the number one fruit for households, with a 73% penetration rate in May 2026. The average production price held steady at €5.58/kg in mid-July, showing stability over a week and a slight increase of 1.4% compared to the previous year. However, significant price variations can be seen in the wholesale markets of the northern peninsula depending on size and quality. Producers' profitability is being heavily challenged by an overall rise in production costs estimated at around 10%. This inflationary pressure is mainly driven by higher costs for transport, packaging and agricultural inputs.

In the Netherlands, the sector is consolidating with Royal Berry's acquisition of Dutch Berries, increasing its area to 110 hectares. After prices collapsed to €2.00/kg due to accelerated ripening

from the heatwave, they bounced back to €6.50/kg thanks to exports to southern Europe.

In France and Spain, the situation is mixed. In France, after a bountiful spring harvest, the summer heatwave downgraded quality, sending large volumes into loss-making processing. In Spain, winter storms in Huelva set production back to 204,035 tonnes (-3%) and reduced export value to €675.7 million.

Exceptionally warm conditions in California

Overall supply remains stable in the United States, but California (a key production area) experienced unusually high temperatures in 2026, along with late May rains that damaged crops and caused losses.

However, quality remains acceptable. Average prices are between €10.00 and €12.00/kg, with steady demand. The attractive prices offered by the processing industry are encouraging some producers to redirect part of their volumes there.

North Africa: Egypt overtakes Morocco

A significant shift is happening south of the Mediterranean, where things are going in completely different directions. Morocco is seeing a decline. Fresh strawberry exports have dropped by 49% (8,906 tonnes) and the cultivated areas have shrunk, going from 3,700 ha in 2022 to 2,300 ha in 2025. The country is facing labour shortages, logistical obstructions to the Gulf and competition from Egypt, whose strawberries are 10% to 15% cheaper.

For its part, Egypt has become the world's leading exporter of frozen strawberries (€580 million in 2025). Even though the country reduced its growing areas this season, the sector is moving upmarket with drying factories, while dealing with the EU's tighter pesticide residue checks since February 2026. 🇪🇬



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A fruit always loved by households, the strawberry is seeing its global production reshaped by heat waves and geographical shifts.



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Mexico, a **key player** in global asparagus production

Alongside China and Peru, Mexico has established itself as one of the world's largest producers and exporters of asparagus. With its 300,000 tons, the production is almost entirely exported to the United States.

BY CHRISTIAN BEFVE

Mexico is now playing with the big leagues. Far from the nostalgic image of subsistence farming, green asparagus production has grown to meet the demand from its North American neighbor. Thanks to Californian varieties adapted to local soil and climate conditions, Mexico can supply the American market 365 days a year.

A vital dependence on the American market

If Mexico produces massively, it's almost exclusively for the United States. More than 90% of the harvest crosses the border. Thanks to geographic proximity and favorable trade agreements, it only takes 24 to 48 hours by truck for a bunch of asparagus to end up in stores in New York or Chicago.

© C. Befve



Asparagus grown in the Queretaro area.

A production concentrated in the northwest

Production is concentrated in the arid areas of the northwest of the country. Thanks to intensive irrigation systems and the adoption of advanced technology, three major regions share the pie according to an almost uninterrupted harvest schedule. Leading the way is the state of Sonora, and more specifically the Carboca region. With its 20,000 hectares under cultivation, this area accounts for more than 50% of Mexican production between January and April. Next are the regions of the Baja Californias (north and south) (9,000 hectares), which take over from fall to spring, ensuring a continuous supply. Finally, further inland, the areas of Guanajuato and Irapuato (4,000 hectares) extend into the summer. This geographical and climatic complementarity gives Mexico a major competitive advantage, allowing it to be present all year round.



Producers from the Baja California area.

Paradoxically, the domestic market is almost non-existent. This product is still too expensive for Mexicans, who prefer nopales (the country's iconic cactus) or zucchini. Asparagus remains a luxury item here, reserved for export.

The consequence of this dependence: when the American market is saturated, the surplus is exported cheaply to Europe, risking to destabilize this opportunistic market. **AB**



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Europlastic trials promising new black/grey **asparagus film**

With increasingly unpredictable weather conditions and labour costs continuing to rise in white asparagus production, Europlastic tested a new hemmed asparagus film last season: Asparatech Black/Grey.



During the warmer spell between 3 and 12 April, both films were turned over: the black/white film was used with the white side facing upwards, while the black/grey film was used with the grey side facing upwards.

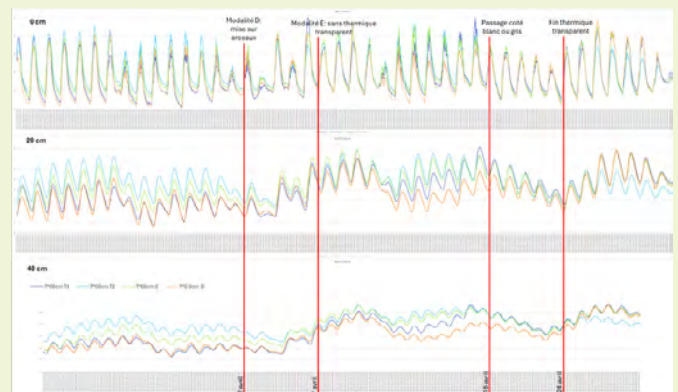
This is where the main differences became apparent. During the day, temperatures measured at 0 cm depth under the grey side were **7 to 9°C higher** than under the Black/White control film with its white side facing upwards.

Importantly, asparagus quality under the grey film remained at an optimum level and productivity remained stable. By contrast, productivity

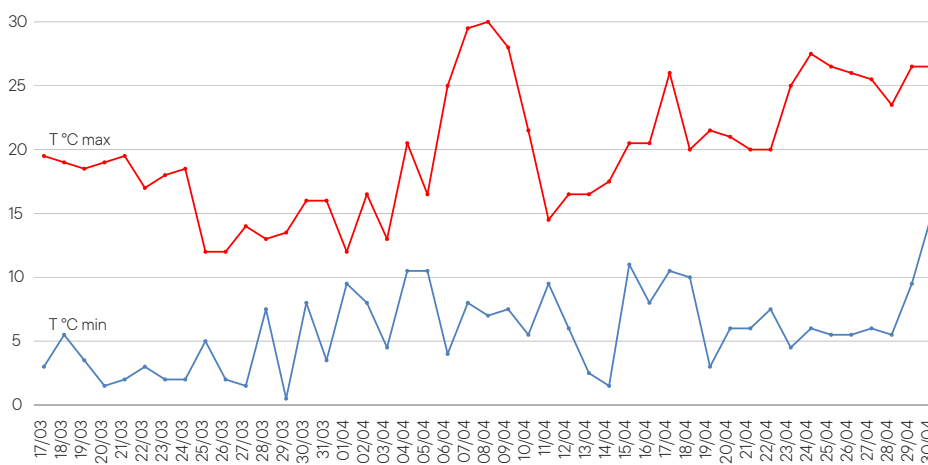
The trial was designed to assess how the new Black/Grey film performs compared with a conventional Black/White film, particularly in terms of temperature management when the lighter side of the film is facing upwards.

Both films were tested at a thickness of 100 µm, with the trial carried out in Anjou at **Fleuron d'Anjou**.

At the start of the trial, both films were laid with the black side facing upwards. Under these conditions, no significant temperature differences were recorded, while spear quality and yield were comparable between the two treatments.



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under the Black/White film dropped significantly once the white side was facing upwards.

These early results are encouraging. Developed by Europlastic, the new Black/Grey version could give growers greater flexibility when turning their films, with a lower risk of losing too much heat and a better ability to maintain both yield and spear quality during changing weather conditions. To be continued... 



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The Kara[®] strawberry variety is well suited to **agrivoltaics**

Agrivoltaics sometimes raises questions about maintaining crop yields under the shade of panels. On his 6-hectare farm, 2 hectares of which uses photovoltaic greenhouses, producer Eric Tovo demonstrates its viability thanks to the use of a specific strawberry variety, the Kara[®] variety.

BY HÉLÈNE SAUVAGE

A few years ago, Eric Tovo, a strawberry grower in the Lot-et-Garonne department, made the enterprising decision to change varieties. Somewhat by chance (see newsletter No.18) he opted for the 'Aurora Karima' variety, from the Italian selection known as 'Kara' on the French market. This round strawberry variety stands out mainly for its hardiness and exceptional agronomic qualities. Very resistant to diseases such as powdery mildew and botrytis, it produces firm fruits with a generous average size of 30 grams. Its hardiness and outstanding post-harvest durability – able to last 8 to 12 days in cold storage – make it a great ally for securing volumes and easing logistics.

Another unique feature of this operation is the 2 hectares of photovoltaic greenhouses from the company Reden Solar. After testing numerous varieties (Gariguet, Mariguet, Murano), Eric Tovo's conclusion is clear: the Kara[®] is the variety best suited for growing under solar panels. But the technical approach requires a few modifications.

A tailored technical plan

The crop is planted on 20 February, an ideal date to take advantage of the increasing spring light that this variety really loves. The planting density is also adjusted: it is set at 8 plants per linear metre (around 80,000 plants per hectare). This more spaced-out density gives a better yield than a 10-plant setup. Using this scheme, the Kara can reach a potential of 700 grams per plant over the season, which is standard for a classic round strawberry. In addition to the yield, the solar infrastructure brings major environmental and financial benefits. Shielded from direct sunlight, the Kara crop sees a reduction in water usage of around 40%.

For Eric Tovo, real profitability is measured by the final net margin rather than the gross yield per plant; the reduction in input costs makes up for any potential yield losses.



© H. Sauvage

Shading the panels helps cut water usage by 40% while protecting the substrate from UV, which doubles the lifespan of coconut husk bags—they're replaced only every four years compared to two years in a standard tunnel.

This protection against drying out also extends the lifespan of coco fibre grow bags. Less exposed to harsh UV, they only need replacing every four years instead of two under a standard tunnel, so it really helps cut down on structural costs.

The only technical challenge of agrivoltaics lies in the uneven climate under the structure, especially on the exposed edges. Eric Tovo solved this problem by adjusting the irrigation: while the centre of the greenhouse is fed by a 4-litre system, the first five metres along the walls (particularly south-facing) get an 8-litre drip feed to compensate for lateral evaporation.

Following this approach, growing Kara under solar panels shows that a sustainable and economically efficient synergy is possible between the energy transition and agricultural excellence. **AB**



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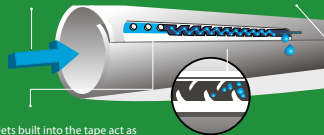
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Early harvest and direct sales: winning choices at Farm du Pont D'Achelles

Shop, vending machines and presence at local markets, direct sales at Farm du Pont d'Achelles is a family tradition and a conscious strategy. You just have to get there early in the season with spring's star products, asparagus and berries!

BY HÉLÈNE SAUVAGE



© Ferme du Pont d'Achelles

Located in the North of France, on the Belgian border, the Ferme du Pont d'Achelles is a long-established vegetable farm. “My parents were vegetable growers on a small plot and they were already selling direct,” explains Olivier Thomas. In partnership with his sister, the farmer wanted to keep the tradition alive while also developing the business and sales points. Almost everything is grown on the farm, but there are a few key products like asparagus and berries, which are the stars in spring. But when you're located in the northernmost region of the country, it's not easy to hit the market early. If you

True to family tradition, Olivier Thomas and his daughter Appoline, cultivate the authentic taste of the products. The greenhouse and tunnel setups allow for early production starting in spring, even in northern France.

want to avoid too much competition and take advantage of the most profitable price periods, you have to be there right at the start of the season, which is before the Easter period. By using plastic tunnels over 1 ha, the farm can offer asparagus as early as March. The same strategy is applied to strawberry production (150'000 plants) where glass greenhouses allow Gariguette strawberries to be available relatively early in the season, while raspberry production ➡



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on 1500m² (Tulameen varieties) runs from the end of May until early October.

Increase the number of points of sale

To get around the price wars of big supermarkets and make the most of its products known for their great taste, the farm relies on a strong family tradition: direct sales. This sales strategy revolves around three main channels: the farm shop, a vending machine and open-air markets. The shop remains the beating heart of the business, alone amounting to 90% of sales of the production. Welcoming 300 to 400 people a day, the managers decided on a personalised service: there's no self-service. Sales assistants serve customers just like at a market, providing genuine advice and a close connection. The store stays open all year and offers some processed products (soups, canned goods, jams), even though the owner mentions having trouble finding staff to manage the processing kitchen. The business

pioneered the installation of vending machines 15 years ago. Restocked every 2 to 3 hours, they complement the shop for customers in a hurry who want to skip the queue or satisfy a spontaneous craving, like for a punnet of strawberries.

Finally, it's Olivier's wife who takes care of the markets. The farm benefits from its excellent catchment area (Armentières, Bailleul) to be present at 5 markets a week. To make this activity easier, Olivier Thomas has invested in a "mobile shop truck", a much more practical and comfortable solution that avoids setting up a traditional stall and protects against bad weather.

With the arrival of the new generation on the farm, developing communication through social media helps showcase the farm's know-how and the value of its products. By combining technical adaptation and short supply chains, Ferme du Pont d'Achelles shows that it's possible to build an agricultural model that can rise to challenges. **AB**

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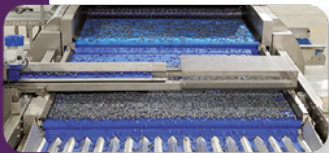


At the Pont d'Achelles farm, it's a family affair: Catherine, Olivier's wife, travels the markets in her converted truck.

© Ferme du Pont d'Achelles



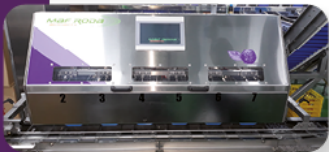
The beating heart of Ferme du Pont d'Achelles, the shop is managed by Françoise, Olivier's sister: open all year round and welcoming up to 400 customers a day. It allows up to 90% of the production to be sold directly from producer to consumer.



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Blueberries: Planasa is betting on 100% mechanical harvesting

Faced with labour and production cost challenges, Planasa's orchard in France is emerging as a pioneer of mechanical harvesting. By testing the Harvy500 model from Fine Field in real conditions, the company is rethinking the agronomic approach to blueberries.

BY HÉLÈNE SAUVAGE

Planasa has at its disposal a 35-hectare blueberry orchard in Gironde (33), France, planted 15 years ago. Established on very favourable acidic soils, it produces high-chill varieties like Duke (very early), Draper (mid-season), and Cargo (late), for a harvest running from June to July. Managed intensively with 4,000 plants per hectare on mulched raised beds and drip-irrigated, the orchard yields between 10 and 15 tonnes per hectare. The cultivation routine is limited to one or two plant protection treatments per year, a post-harvest insecticide, and a fungicide on Botrytis-sensitive varieties. The main concern is spring frost during the April-May flowering, which is managed if necessary using candles.

The economic equation of mechanisation

Planasa is making a major technological shift in this area in response to rising manual harvesting costs. 'In France, picking blueberries by hand costs around €2.20 to €2.30 per kg. With the mechanical harvester, this cost drops to €0.70 or €0.80 per kilo, and the estimated volume of losses is 5%', explains Frédéric Faillières, Head of Northern Europe operations at Planasa. For an investment of around 350,000 euros per machine, he estimates that the Heavy500 pays for itself in about two years. 'For optimal profitability, you need one machine for every 10 to 12 ha.' On the ground, the machine moves at a speed of 100 metres per hour. If its battery is fully charged, it needs a team of four people to operate it, to supervise the operations, load and unload the crates at the end of the row, and handle the machine's row changes. Harvesting starts once the orchard reaches about 70% ripeness, with a mandatory double pass over each plot.

Adapting the Orchard's Morphology

However, Frédéric Faillières insists some morphological adaptation of the orchard is necessary. In order to allow the harvester to pass, the rows must be at least 3 metres apart. The shrubs should be pruned so that they stay straight, open (up to 2.30 m high),



© H. Sauvage

The automatic harvesting robot is equipped with shaking heads of adjustable intensity to suit the ripeness of the berries. The fruits are collected on soft brushes and conveyed to collection bins. Equipped with solar panels, it has an autonomy of 10 to 13 hours even in cloudy conditions.

and with no low branches brushing the ground. During winter pruning, it's also important to try to reduce the number of fruits in the middle of the row, where the machine may operate less effectively. On the R&D side, the challenge is also to select varieties with very uniform ripening and in clusters.

The cold chain challenge

Whilst the harvester allows a throughput of 500 to 1,000 kg per hour (compared to just 7 kg manually), it does shift the bottleneck to the post-harvest logistics. To preserve the quality of fresh blueberries, the berry's temperature needs to drop to 1°C within an hour of being picked. This requires setting up fast flows and organising orchard access routes to get the fruit to the fridges without wasting time. To get a realistic economic view, Frédéric Faillières points out that technically, you need to factor in the purchase of industrial sorting and grading equipment. For now, Planasa ships its harvest directly to the Netherlands to Berry Pack Service for packaging. 🇳🇱



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AsperCut takes another step towards automated asparagus **harvesting**

Following several seasons of field trials in France and Germany, Sylektis is taking AsperCut into a new phase. The harvesting robot has increased its capacity and is now also available for green asparagus. Series production machines are being offered for the 2027 season.



© Sylektis

AsperCut harvests green asparagus at high speed, with harvesting rate of up to 60 asparagus per minute.

The 2026 season marked an important milestone for AsperCut. Developed by Sylektis, the harvesting robot continued to be tested under real field conditions in France and Germany, with a focus on improving harvesting speed and adapting the technology to different production systems. For white asparagus, an acceleration of the harvesting robot has increased its capacity by 50%. The machine is now equipped with two harvesting robots and can reach speeds of up to 20 white asparagus per minute.

A new step with green asparagus

The major development this season, however, has been the move into green asparagus. For the first time, AsperCut has been used to harvest entire areas of green asparagus. Its new robot is designed to rapidly detect asparagus that has reached the required length, harvest it and place it directly into crates.

Trials in Germany, at the farm of Stefan Blümel, provided an opportunity to test the machine under intensive working conditions. The Bavarian producer grows 25 hectares of green asparagus and 50 hectares of white asparagus. Throughout the season, AsperCut harvested day after day, demonstrating its ability to maintain a continuous harvesting rhythm across the fields. Blümel also shares his experience of testing the technology on his farm.

AsperCut is now available in configurations for both white and green asparagus. For green asparagus, the machine can be fitted with one, two or three harvesting robots, depending on the characteristics of the farm. The appropriate configuration takes into account factors such as the cultivation system, number of rows and ridge length.

Another feature highlighted by Sylektis is the machine's ability to operate both day and night. ➡



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With two robots per machine, AsperCut takes another step forward in the automation of white asparagus harvesting.

Its hybrid configuration is designed for continuous use throughout the harvesting season, while a single operator can supervise several machines and adapt the number of units to the area being harvested. Sylektis has now opened sales of its series-production machines for the 2027 season, covering both white and green asparagus. The company is offering

producers a free, farm-specific assessment to determine the most suitable AsperCut configuration and estimate its potential harvesting capacity. Producers can also rent a machine to test the technology before making an investment. Availability for the 2027 season is limited. 

VIDÉOS

AsperCut harvesting agreen asparagus



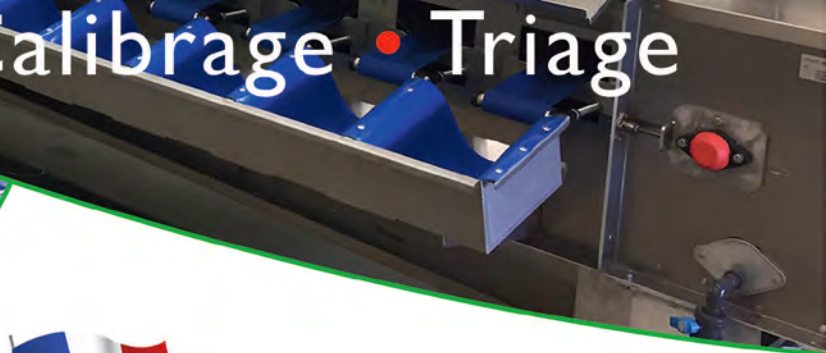
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Asparagus Robot Meet-up

Manual Harvesting vs. Robots – Experiences, Results, Prospects

Whilst labour costs continue to rise steadily, revenues are stagnating. This necessitates a rethink among producers: the efficient management of harvesting costs will be the decisive factor for the economic viability of asparagus farms in future.

To provide producers with an independent and well-founded basis for decision-making, the VSSE e.V. has commissioned and funded a comprehensive practical study.

Experienced **asparagus producer Rolf Meinhardt** (VSSE) and **labour economist Monika Schulz** (ratiochron) have conducted an in-depth examination of the harvesting robots already available on the market in real-world conditions.

Based on quantitative data on the number of spears, detailed quality assessments, video analyses and interviews with the manufacturers, the speakers paint a clear and impartial picture of the current state of automation in direct comparison with traditional manual harvesting.



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22 October 2026, 1.30 pm–6.30 pm
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Make use of this in-depth insight to shape the strategic direction of your asparagus farm

The event

- **Date:** Thursday, 22 October 2026 | 1.30 pm to approx. 6.30 pm
- **Event type:** Hybrid specialist event (attendance in person or via Zoom)
- **Venue:** Obst- und Gemüse-Vertriebsgenossenschaft Nordbaden eG, Industriestraße 1–3, 76646 Bruchsal
- **Participation fee:** €65 (plus VAT)
Drinks during the conference and refreshments during breaks are included in the fee for on-site participants. Invoices will be issued after the event by VSSE e.V.

Programme

- **1.30 pm | Tour of the Sylektis and Prefiro robots**
- **2.30 pm | Welcome**
Simon Schumacher (VSSE e.V.)
- **2.35 pm | Current situation and decision-making criteria for the investigation into mechanised asparagus harvesting**
The focus is on the results of existing harvesting methods and the challenges involved.
Monika Schulz (ratiochron)
- **3.05 pm Presentation of the analysed machines from AVL Motion and Lommers**
Description of the machines under consideration in terms of their respective functions and operating principles.
Rolf Meinhardt (VSSE e.V.)
- **3.40 pm | Coffee break and professional discussion**
- **4.10 pm | Analyses and results**
Presentation of the methodological approach and an overview of the findings
Monika Schulz (ratiochron) and Rolf Meinhardt (VSSE e.V.)
- **5.55 pm | Panel discussion and responses from manufacturers**
Discussion session with the manufacturers, involving both the manufacturers and participants

All presentations and interviews will be in German only

Registration is required by 15 October.

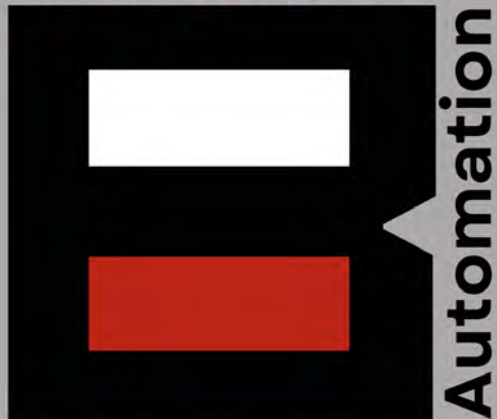
Prior registration is required to take part. Places are limited. You can use the online form to specify whether you wish to attend in person in Forst or virtually via Zoom:

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A successful **diversification** thanks to blueberries

Established for five generations in the heart of Lot-et-Garonne, the Ferrussac domain estate has undertaken a strategic diversification thanks to blueberries. To ensure preservation and freshness, the estate has chosen a 100% manual harvest.

BY CHRISTIAN BEFVE

Anchored in a 14th-century fortified mill in Saint-Maurin near Agen, Domaine de Ferrussac represents a family adventure passed down through five generations. Run by Eloi Viannay, Vincent, and Côme Lapierre, the estate cultivates 26

hectares of apples, 12 hectares of Ente prunes (Agen); 6 hectares of kiwis, and 5 hectares of blueberries since 2022. The choice of this new crop was driven by the need to diversify and adapt: to cope with the forced abandonment of walnut cultivation, which had become too vulnerable to bacterial diseases following the withdrawal of mancozeb and the lack of alternative solutions. The blueberry orchard was set up at the Motesquieu site, whose Garonne silt (pH 6.7) is perfectly suited to

blueberries, which thrive in acidic soils. This diversification also helped meet the demand of consumers looking for local fruits grown in an environmentally friendly way.

Choosing a 100% Manual Harvest

Among the varieties grown, the Centra Blue variety is favored by producers for its yields and late ripening. Beyond the demanding technical process, the partners have opted for a 100% manual harvest. It takes place from late May to late September, with pickings every 7 to 10 days, preferably outside



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Carros móviles permiten mover las cajas vacías y llenas directamente por los surcos sin nunca ponerlas en el suelo, preservando así la limpieza y la calidad de los arándanos.

of the peak heat (in the morning) to preserve the quality and shelf life of the fruit.

Seventeen people, including Moroccan seasonal workers who stay on the farm, take part in the picking according to a highly organized system. The average productivity is 6kg/hour. Payment is hourly and can be supplemented with a bonus for anything over 6 kg/h. Each picker moves along their own row with a small bucket and a cart, which allows them to transport empty and full crates without ever setting them on the ground. This careful handling preserves the natural bloom and the integrity of the fruit. Each crate is immediately identified (date, variety, picker) to ensure strict traceability, then the fruits are promptly placed in a nearby buffer fridge before being transported in a refrigerated truck to the processing station.

From the orchard to the plate: 'The Fruit of Common Sense'

Ferrussac blueberries are sold through several channels: direct sales at the farm, specialty stores, producer shops, local supermarkets, and purchasing centers. Available on the market for about 4 months, the Ferrussac estate retains its customers by offering consistent quality and price. A new visual identity with logo and the slogan 'the fruit of common sense' is being applied across packaging. The goal is to strengthen the identity and recognition of the Ferrussac brand. **AB**



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Côme Lapierre, one of the leaders, also heads the Association of Blueberry Producers of France (APMF).