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Report Highlights:

EU commercial apple production in Marketing Year (MY) 2021/22 is forecast at 11 MMT, an increase of 4.5% compared to the previous year. EU commercial pear production is expected to amount to 1.6 MMT; 28% lower than in the previous year, due to unfavorable growing conditions early in the season, while EU commercial table grape production is forecast up 1% from the previous season at 1.38 MMT. COVID-19 did not impact production volumes but did increase production costs due to the imposition of COVID-19-related sanitary standards in the harvesting and distribution process.

This report covers the commodities:

Apples, Fresh

Pears, Fresh

Table Grapes, Fresh

Disclaimer: This report presents the situation and outlook for apples, pears, and table grapes in the European Union (EU). This report presents the views of the authors and does not reflect the official views of the U.S. Department of Agriculture (USDA). The data is not official USDA data.

Note: Effective January 1, 2021, the separation of the United Kingdom (UK) from the European Union (EU) is complete, including trade between both entities. **In this report, unless otherwise noted, “EU” means the current EU27 without the UK.** However, Production, Supply, and Distribution (PSD) tables still include numbers for EU27+UK in the columns "USDA official." The column "New Post" in the PSD tables only includes the EU27 (without UK). Please note that due to this change "USDA official" and "New Post" cannot be compared as they represent different data sets.

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Abbreviations and terms not otherwise defined in the report:

EU	European Union – 27 EU member states
FAS	Foreign Agricultural Service
HA	Hectare; 1 ha = 2.471 Acres
kg	Kilogram
MT	Metric Ton = 1000 kg
MMT	Million Metric Tons
MS	EU Member State(s)
MY	Marketing year
Apples:	July/June
Pears:	July/June
Table Grapes:	June/May
PSD	Production, Supply, and Distribution
TDM	Trade Data Monitor, LLC
UK	United Kingdom
US	United States (noun)
U.S.	United States (adjective)
USEU	U.S. Mission to the European Union
WAPA	World Apple and Pear Association

Trade data cited in this report was derived by using the following Harmonized Commodity Description and Coding System (HS) tariff codes:

Apples:	0808 10
Pears:	0808 30
Table grapes:	0806 10

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Executive Summary

Apples

Commercial apple production in Marketing Year (MY) 2021/22 (July/June) is forecast at 11 MMT, an increase of 4.5% compared to the previous year. The increase is mainly a result of a production rebound in Poland, Hungary, and Spain that more than compensated for declines in Ireland, France, Italy, Austria, and Slovenia, which were all hit by frosts. Market prospects are good as beginning stocks were very low both for fresh apples as well as for apple juice and concentrated apple juice (CAJ). The latter is important as the processing sector absorbs significant amounts of lower quality apples. Since 2014, U.S. apple exports to the EU have been fairly low due to technical issues linked to using *morpholine* as an additive in waxes, and *diphenylamine* (DPA) – a post-harvest treatment for storage scald. In recent years, virtually all of U.S. apples exported to the EU were going into the UK and consisted of organic apples. With the completion of Brexit, U.S. apple exports to the EU have ceased. The EU is a competitor for U.S. apple exports in markets like Saudi Arabia, the United Arab Emirates (UAE), and India.

Pears

MY 2021/22 (July/June) EU commercial pear production is expected to amount to 1.6 MMT; 28% lower than in the previous year, due to unfavorable growing conditions early in the season, which resulted in lower fruit setting. This especially pertained to Italy, Belgium, the Netherlands, and France. In contrast, production is forecast to remain comparatively stable in Spain and even increase in Portugal. The Netherlands, Spain, Belgium, Italy, and Portugal together account for more than 80% of EU pear production. The taste, color, and storage quality are expected to be good, as hail damage was not a major issue this year. EU pear imports are expected to increase in MY 2021/22 due to the low EU production. For the same reason, exports are expected to decrease. Pear trade between the United States and the EU is minute.

Table Grapes

In MY 2021/22 (June/May) commercial EU table grape production is forecast up 1% from the previous season at 1.38 MMT. This is mostly due to volume increases in Italy, thanks to dry weather in May and the first two weeks of June that favored fruit setting. Smaller increases are forecast for Spain, Romania, Portugal, and Bulgaria. Conversely, decreased volumes are forecast for Greece and France, due to unfavorable weather. Overall, fruit quality is forecast to be excellent with higher sugar content due to hot temperatures in July, August, and early September. EU table grape imports from the United States are marginal. EU table grape exports to the United States are small but increasing.

COVID-19

Impact on Production

The overall impact of COVID-19 on production volumes of apples, pears, and table grapes was limited in both MY 2020/21 and MY2021/22. However, production costs increased due to the imposition of COVID-19-related sanitary standards. These included minimal distancing rules, new documentation requirements, and heightened standards for accommodation and transport of workers. This required adaptation of workflow organization and additional investments. A shortage of seasonal labor, a major concern for European fruit farmers at the onset of the pandemic when borders were closed and movement restrictions were put in place, occurred in late spring and early summer of 2020. This affected care and protection treatments, e.g., summer pruning and thinning. By the time of the 2020 harvest, the legal issues related to the arrival of seasonal workers had been resolved. However, the threat of having to quarantine upon returning to their home countries resulted in fewer seasonal workers making the journey. This was especially reported for workers from Ukraine and Moldova. In some countries (for example Bulgaria), the shortage of seasonal workers carried through into 2021.

Impact on Consumption

The impact of the COVID-19 pandemic on consumption was mixed. During the various lockdowns¹ apple, pear, and table grape out-of-home consumption plummeted due to the closure of hotel, restaurant, and institutional (HRI) outlets. This was especially felt in the tourist regions around the Mediterranean. Snacking-on-the-go stopped altogether as people remained at home. Part of this decrease was offset by increased sales through retail channels as consumers stocked up on healthy and shelf-stable food. The magnitude of impact largely depended on the strictness of the lockdown measures in the different member states, which ranged from a nearly total stay at home requirement (e.g., in Spain) to a “lockdown light,” which limited the number of people that could get together in private gatherings but allowed restaurants to remain open under certain conditions and with fewer guests (e.g., in Germany). In general, the impact was more severe in MY2020/21 than what is expected for MY2021/22.

Impact on Trade and Distribution

The closure of borders at the beginning of the pandemic led to some disruption of intra-EU cross-border trade but was resolved quickly. International trade was affected by lockdown measures in importing countries (China and South America). Initially, the impact was limited to the early stages of the pandemic. However, industry experts have noted that social distancing measures continue to have an impact on the distribution process requiring more time than was needed before the pandemic. This, in combination with general disruptions in logistics, e.g., lack of containers, has increased the costs of trading and distributing apples, pears, and table grapes.

¹ Lockdown periods varied by country but generally occurred during the months of March – June 2020 and then again during November 2020 – March 2021.

Financial Aid to Alleviate Economic COVID impact

Some member states (e.g., Hungary) provided financial assistance specific to the farming sector to alleviate the economic impact of the COVID pandemic. Others (e.g., Germany) included agriculture in more general support programs that were available to a broader range of companies. Assistance varied by member states and included elements of grants, tax relief, credit programs, loans at reduced interest rates, and loan repayment moratoria.

Brexit

The UK is an important market for EU fruits. Consequently, the EU-27 fruit sector was relieved that the EU and UK negotiators reached a Trade and Cooperation [Agreement](#) (TCA) on December 24, 2020 that set out the rules on the new partnership between the EU and UK. These went into force on January 1, 2021, and resulted in some border disruption, delays, and stuck shipments, especially on the UK side as EU ports and customs immediately enforced the new customs document requirements according to EU guidelines, while the UK implemented a phased-in grace period through July 1, 2021, which was subsequently extended until July 1, 2022. For more details please see policy section.

Apples, Fresh

Coordinated by Sabine Lieberz/FAS Berlin

Production, Supply, and Distribution

Apples, Fresh	2019/2020		2020/2021		2021/2022	
	Jul 2019		Jul 2020		Jul 2021	
	Market Year Begins					
European Union	USDA Official EU27+UK	New Post EU27	USDA Official EU27+UK	New Post EU27	USDA Official EU27	New Post EU27
Area Planted (HA)	530,247	513,183	530,975	505,872	0	506,136
Area Harvested (HA)	515,709	491,350	517,221	494,680	0	494,017
Commercial Production (MT)	11,011,426	10,797,264	10,802,640	10,529,496	0	11,004,850
Non-Comm. Production (MT)	693,280	682,292	1,424,800	1,189,672	0	872,200
Production (MT)	11,704,706	11,479,556	12,227,440	11,719,168	0	11,877,050
Imports (MT)	502,500	377,780	460,000	324,625	0	340,000
Total Supply (MT)	12,207,206	11,857,336	12,687,440	12,043,793	0	12,217,050
Domestic Consumption (MT)	11,192,106	10,659,185	11,807,440	10,960,179	0	11,157,050
Exports (MT)	1,015,100	1,198,151	880,000	1,083,614	0	1,060,000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	12,207,206	11,857,336	12,687,440	12,043,793	0	12,217,050

(HA), (1000 TREES), (MT)

Not official USDA data. Sources: Trade for MY 2019/20 and 2020/21: Trade Data Monitor, LLC (TDM) accessed on September 17, 2021; All other: FAS EU posts

Apples, Commercial Production²

The EU is one of the leading producers and consumers of apples in the world. Commercial apple production exists in all member states, with the exception of Estonia and Malta. The top five producing member states (Poland, Italy, France, Germany, and Spain) together account for 77% of the total EU commercial apple production.

Area

² Commercial apple production includes commercially grown apples for the fresh market (table apples) as well as for processing.

With a marginal decrease of 0.13%, the EU's harvested apple area remained relatively stable in MY 2021/22, as reductions in Greece and to a lesser extent in Germany, the Netherlands, Slovakia, and Belgium were almost compensated by increases in Poland, Romania, France, and Bulgaria.

- In the Netherlands, growers are either leaving the business or are moving into the production of Conference pears due to higher profitability.
- In Spain, total planted and harvested areas have stabilized after continually falling at a modest pace since 2013. Over the last decade, Spain's apple area decreased by 9.5% in total as a result of the replacement of deciduous fruit plantings with alternative fruit trees with higher profits (mostly stone fruit). Increasingly, new apple orchards are planted in the mountains, where the climate is more moderate.

Production

Commercial apple production in MY2021/22 is forecast to increase by 4.5% compared to the previous year. The majority of the increase is projected for Poland, Hungary, and Spain with roughly 350,000 MT, 160,000 MT, and 122,000 MT additional production, respectively. In all three countries this is a rebound from low production in the previous year. Production is also forecast to increase in Germany, Portugal, the Netherlands, Belgium, Romania, Slovakia, and Bulgaria, but with lower volumes. The combined increase more than compensates lower production forecasts elsewhere, most notably in France, Italy, Austria, and Slovenia with projected reductions of roughly 160,000 MT, 78,000 MT, 22,000 MT, and 21,700 MT respectively.

In most parts of the EU, the rainy and unusually cold spring led to delayed flowering and reduced pollinator activity. As a result, fruit development and harvest was delayed by one to three weeks, depending on the region. The torrential rains and flooding that occurred in Belgium, Germany, and the Netherlands in mid-July, did not affect apple production. Quality is expected to be good, as the hail damage that occurred was very localized. However, France reports a higher than normal share of small fruit.

The sharp increase in costs for inputs, mainly fertilizers and pesticides, is a big concern for the short-term profitability of apple production. The increasing lack of approved pesticides poses a threat in the long run.

Organic Production

Organic production is a growing segment in the EU deciduous fruit sector, however, data is not available for all member states. According to Eurostat, in 2019, the three member states with the largest organic apple acreage were France, Poland, and Italy; while Hungary, Slovenia, Italy, and Austria showed the highest percentage of their apple acreage devoted to organic production.

At Prognosfruit³, the EU's organic production was forecast to increase to 605,650 MT compared to 531,990 MT in 2020. While this is an increase of 14% year on year, organic production makes up only 6% of commercial apple production. This share of production is way below the EU's 25% target but projected to increase. However, industry sources are concerned that at the projected pace the increase in EU organic apple production could soon outpace the growth in consumption and lead to falling prices.

³ Prognosfruit is the European annual apple and pear production forecast conference usually happening in the first week of August. For more information please visit: <http://prognosfruit.eu/en/welcome-to-prognosfruit/>

EU-27 Commercial Apple Production by Country and Year in MT

COUNTRY	2019/20	2020/21	2021/22 e	Change 2021:2020	Share of Total Production in 2021
Poland	3,040,000	3,300,000	3,650,000	11%	33%
Italy	2,095,586	2,123,640	2,045,610	-4%	19%
France	1,519,000	1,322,000	1,162,000	-12%	11%
Germany	991,451	1,023,316	1,080,000	6%	10%
Spain	592,289	465,453	587,750	26%	5%
Hungary	464,470	324,415	484,500	49%	4%
Romania	370,000	400,000	420,000	5%	4%
Portugal	355,700	278,000	312,000	12%	3%
Greece	277,106	290,716	280,000	-4%	3%
Netherlands	272,000	220,000	250,000	14%	2%
Belgium	233,000	161,000	187,000	16%	2%
Austria	184,265	160,053	138,000	-14%	1%
Czech Republic	99,496	115,585	111,540	-4%	1%
Croatia	68,352	63,317	63,000	-1%	0.6%
Slovenia	54,272	66,668	45,000	-33%	0.4%
Lithuania	32,000	53,000	40,000	-25%	0.4%
Bulgaria	40,122	36,274	37,000	2%	0.3%
Slovakia	35,185	28,429	30,700	8%	0.3%
Sweden	20,000	32,000	27,000	-16%	0.2%
Ireland	19,880	20,460	18,000	-12%	0.2%
Denmark	15,000	24,000	18,000	-25%	0.2%
Latvia	10,000	14,000	12,000	-14%	0.1%
Finland	8,090	7,170	5,750	-20%	0.1%
Total	10,797,264	10,529,496	11,004,850	4.5%	

e= estimated; Note: The table is grouped by ranking in MY 2021/22. Due to rounding percentages add up to marginally more than 100 percent. Source: FAS EU posts

- In Poland, low air temperatures at the beginning of the growing season slowed down the development of flower buds and delayed the flowering period. This helped the flower buds to survive the sudden cold spells, which hit Poland in April-May. Due to frequent rains in many parts of the country, it was difficult to carry out chemical protection of plants against fungal diseases. June was warm, and weather conditions were favorable for fruit development. The apple harvest began later than usual.

- Italy produces almost 17% of the EU's apples. The largest producing regions are *Alto Adige* and *Trentino* in the North-East of the country, but apples are also produced in *Piemonte*, *Veneto*, *Emilia Romagna*, *Friuli-Venezia Giulia*, and *Lombardia*. Despite the frost that occurred at the end of March/early April in the regions of *Trentino*, *Piemonte*, *Veneto*, *Emilia-Romagna*, *Friuli-Venezia Giulia*, and *Lombardia*, production is forecast to only decrease by 4% and remain in line with Italy's average production. Quality is expected to be good.
- The French apple crop is expected to drop by 20% from the five year average (and 12% from the already low 2020 crop) due to a widespread frost that hit most of the producing regions in early April 2021, right at the time of flowering. In some regions, such as the Rhone valley, production is halved from the five-year average. On the other hand, western France was less impacted by the frost. The wet spring and summer further lowered the crop by limiting the surviving fruits' growth (resulting in a higher percentage of smaller fruit) and increasing the disease pressure on the crop. Altogether, the harvest was 10 to 20 days later than average.
- In Germany, the projected 6% increase in commercial production is mainly due to a rebound of production in the Western (Rhineland) and Eastern (Saxony) apple producing regions while production in the North (around Hamburg and *Altes Land*) and South (Lake Constance) expect minimal change compared to the previous year. Fruit size is expected to be good and quality above average.
- Spanish commercial apple production includes table apples and cider apples destined for apple cider production. MY 2020/21 production of table apples is estimated at 542,748 MT, a 27% growth compared to the previous season, and a 13.5% growth compared to the average of the last ten years. The Spanish Ministry of Agriculture supports the fruit sector through the *Digitalization and Big Data Group*. This group is composed of 43 independent experts and aims to help fruit growers and industry to reach new sustainability goals and enable the transitions included in the EU Farm to Fork strategy. Improvements in sustainable production are mainly focused on reducing waste, CO₂ emissions, water footprint, and inputs, as well as on increasing the use of renewable energies and environmental measures to produce more efficiently through reduced resource use. In this sense, technology and innovation, digitalization, and Artificial Intelligence (AI) are key factors in the overall Spanish fruit sector.
- Hungary expects significantly higher production and yields compared to the record low results of the previous year. This is despite intense fruit fall in the summer due to unfavorable weather conditions (lack of precipitation and extremely high temperatures in June). About two-thirds of the combined (commercial and non-commercial) production is destined for industrial use. In 2020, the Hungarian Government (GOH) announced support programs with around \$81 million in grants to help farmers, agricultural, and food enterprises overcome the economic difficulties

caused by the COVID-19 pandemic with the aim of preserving food safety and the export potential of Hungary's agriculture. The GOH also provided growers with tax relief, credit programs, and a loan repayment moratorium to keep the sector alive.

- In 2021, Romania's apple production is forecast to increase by 3% from the previous year, when farmers harvested a crop that was 10% higher than originally estimated. Timely rain favored fruit development. A late frost mostly affected peach and apricot trees, and less so apple trees. Hail only sporadically affected the orchards. Current demand supports a good price level for apples.

Varieties

Some 25 apple varieties are produced commercially in the EU in volumes exceeding 10,000 MT. Among these, *Golden Delicious*, *Gala* types, and *Jonagold* types (*Jonagold*, *Jonagored*, *RedJonaprince*) are the dominant varieties. However, production patterns vary. While *Golden Delicious* is the variety with the largest production in Italy, France, Spain, Portugal, and Romania, *Jonagold* types are dominant in Germany and Belgium. In contrast, *Gala* achieves its position as the second most produced apple in the EU by being grown in numerous member states rather than dominating in a few. *Idared*, which was one of the most grown varieties in Eastern Europe prior to the Russian import ban⁴ is still the number one variety in Hungary but dropped to number two in Poland and Romania.

New varieties, for example *Pink Lady*®, *Kanzi*®, *Rubens*®, *Tentation*®, *Wellant*, *Cameo*, and *Kiku*®, have increased their share of production in recent years. Among these trademark protected "Club"⁵-varieties are gaining traction. Denmark, the Netherlands, and Slovakia have the highest share of "new" varieties in their production portfolio with 28, 12, and 10% of their respective total production.

Varieties that are resistant or tolerant against fungus diseases such as mildew (caused by *podosphaera leucotricha*) and scab (caused by *venturia inaequalis*) are increasing, as these are better suited for growing under organic production. Examples of such varieties include *Topaz* and *Santana*.

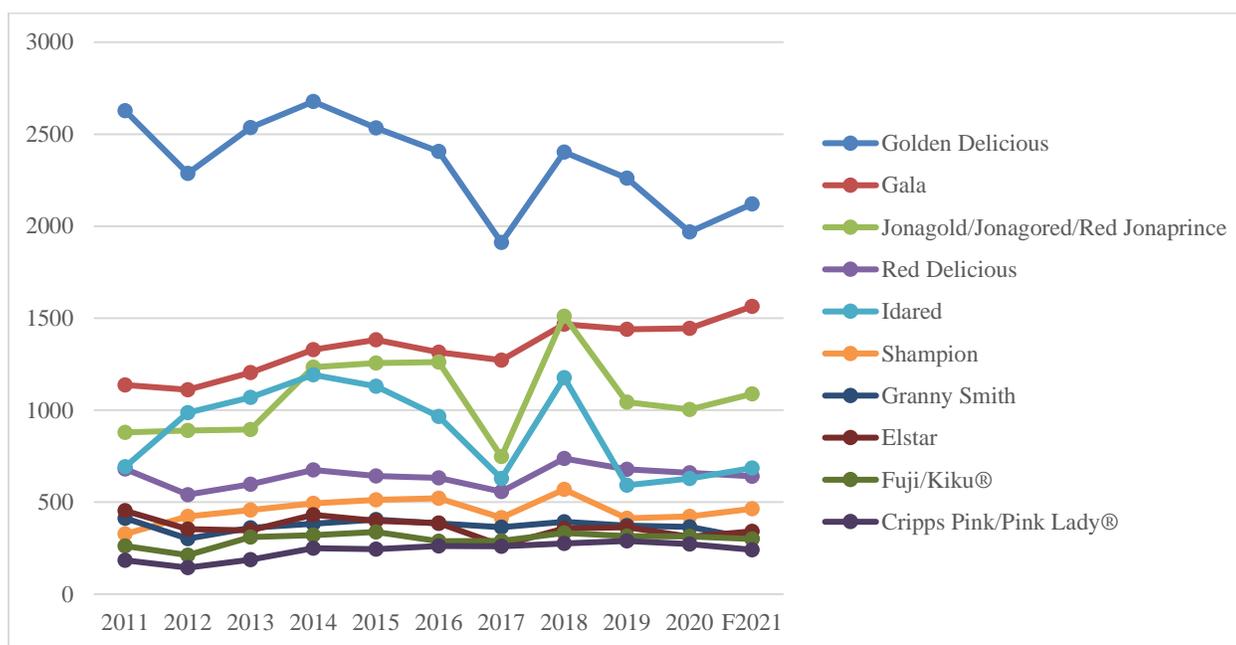
- In Poland, apple growers are replacing older orchards with newer more popular varieties, such as *Shampion*, *Gala*, *Golden Delicious*, thus partly replacing *Idared*, which used to be the dominant variety grown in Poland before Russia imposed the import ban on the EU in 2014.
- In Spain, the planting of new varieties⁶ that are better adapted to warm climates aims at higher quality and more competitive and efficient product.

⁴ See policy section

⁵ Club varieties are managed and grown under a licensing agreement with plant breeders or variety consortia. The licensing agreements usually restrict planted area and includes variety specific quality and marketing rules.

⁶ For example: *Pink Lady*®, *Envy*®, *Jazz*®, *PacificRose*®, *SweetTango*®, *HoneyCrisp*®, and *Story*

EU27+UK⁷ Apple Production for Top 10 Varieties in 1000 MT



F = forecast; Source: FAS EU based on World Apple and Pear Association (WAPA) data

Apples, Non-commercial Production

Non-commercial production in MY2021/22 is estimated to have dropped by 26% compared to the abundant MY2020/21 harvest, mostly due to severe drops in Germany, Austria, and Slovenia, and to a lesser extent in Spain, Belgium, and Croatia. Increases in Poland and Hungary alleviate the drop, but are not strong enough to fully compensate for the above mentioned reductions. Non-commercial production tends to alternate between good and poor crop years. However, most EU member states do not report estimates for non-commercial production. As a result, the production figure provided in the PSD table at the beginning of the apple section is a rough estimate based on industry rather than official information. In MY2021/22, non-commercial production represents about 7% of total apple production, compared to 12% in the previous MY.

Non-commercial production includes apples grown in home gardens and in untended trees in meadows or field edges. Typically, non-commercial production is used for fresh consumption; apple juice, apple cider, and spirits production; baking (cakes, tarts); or preserved foods (canned, dried, and cooked). The amount of apples diverted to the different segments varies depending on the price for processing apples. Higher processing apple prices generally result in a higher proportion of fruit entering juice production. In general, non-commercial production is gradually decreasing in the EU-27 as hobby farmers age. Younger generations have not shown the same interest in small-scale production. Instead, commercial production of higher acid apple varieties for processing is expected to increase to meet demand from the juice concentrate industry.

⁷ Data for the EU27 without the UK is not available at this point.

Apples – Stocks

According to the World Apple and Pear Association, EU apple stocks totaled 456,201 MT on July 1, 2021, compared to 339,801 MT at the same time in 2020. In some member states, the stock number is comprised of apples stored at producer organizations while in other member states stocks are at producer organizations and wholesalers. More important than the actual number is the year-on-year-change in stocks as end of MY stocks can have a detrimental effect on prices for the new harvest. In this report, stocks are included in the “domestic consumption” line in the PSD.

Apples – Consumption

Apples are the most popular fruit in all member states except for Spain, where oranges⁸ are number one. The average per capita consumption in the EU for MY2021/22 has been calculated at 16.1 kg. However, there is a big spread between the member states ranging from 12 kg in Spain to 27 kg in Portugal. Per capita consumption of apples has been decreasing in recent years as consumers eat more soft fruit (for example in Germany) or stone fruit (for example in Spain).

Apples, Processing

Despite dramatically lower non-commercial production, processing use of apples is expected to increase by 4% in MY2021/22 compared to MY2020/21, amounting to roughly 3.9 MMT. However, this projected increase masks opposite developments in some member states. Higher volumes going into processing are expected in Poland, Hungary, Spain, Romania, Italy, and Portugal. In contrast, lower volumes are forecast for Germany, Austria, Slovenia, France, Croatia, Belgium, Lithuania, and the Czech Republic. The changes are a function of, increased commercial production in Poland, Hungary, Spain, and Portugal and decreased non-commercial production in Germany, Austria, and Slovenia.

The processing sector absorbs the majority of non-commercial production plus a varying share of lower quality commercial production, depending on the price for processing apples. For MY 2020/21, it is expected that prices for processing apples will benefit from low beginning stocks of apple juice and concentrated apple juice (CAJ), as well as from a competitive advantage of EU CAJ (mostly from Poland) compared to CAJ from China on the U.S. market. At the *Prognosfruit* conference in August it was reported that freight rates from the EU to the United States were \$300-\$500 lower than those from China to the United States. At an average product price of \$1,100/MT of CAJ, the freight rate difference amounts to one-third of the product price.

Processing uses for apples include, among others, apple juice, concentrated apple juice (CAJ), cider, wine/brandy, apple sauce, preserves, canning, apple chips, and peeled apples for bakeries. The share of apples used for processing varies significantly by member states, ranging from none in Greece and the Scandinavian countries to well over 70% in Hungary.

⁸ For more information on citrus consumption please refer to the EU Citrus Semi-Annual 2021

The processing share also varies from year to year. The EU-27 average share of apples going into processing is forecast to amount to about 35% of total supply in MY2021/22 compared to 34% in the previous MY. Major member states with apple processing include Poland, Germany, Hungary, Italy, Romania, France, Spain, Austria, and the Czech Republic (in order of descending volume in MY 2021/22).

Table: Fresh and Processed Consumption of Apples

	MY2019/20		MY2020/21		MY2021/22f	
	MT	Share	MT	Share	MT	Share
Fresh	6,975,105	65%	7,190,916	66%	7,226,450	65%
Processed	3,684,080	35%	3,769,263	34%	3,930,600	35%
Total	10,659,185	100%	10,960,179	100%	11,157,050	100%

F = forecast; Source: FAS EU Posts

Apples – Trade

The majority of trade occurs among the EU member states. Over the past five years, on average about 1.3 million MT of apples were traded between EU member states, while roughly 300,000 to 390,000 MT were imported from outside the EU. In recent years, imports from outside the EU contributed between 3 and 5% of the total EU apple supply.

EU external trade

EU-27 – UK trade

Over the past five years, EU-27 apple exports to the UK fluctuated between 170,000 to 250,000 MT. The main EU apple exporters to the UK included France, Italy, Spain, Germany, the Netherlands, and Belgium. The UK is a particularly important destination for French and Spanish apple exports, as it is the number one and number two export destination for these two countries, respectively. UK exports to the EU-27 were much lower, between 12,000 and 25,000 MT, with the vast majority going to Ireland.

Trade flows are exhibiting change from January 1, 2021, as the UK departed the EU single market and customs union. An increase of apple imports into Ireland is expected from other member states, to circumvent the need for Brexit-related paperwork now required when shipping into the UK and from the UK to Ireland. In addition, the UK has less product to export since it was also affected by cold weather in April and May 2021.

Apples, Imports

For MY2021/22, imports are expected to partially rebound, especially in Belgium, France, Greece, and the Netherlands, and to increase to Slovenia. The latter being a result of dramatically lower domestic production. In MY2020/21, about 63% of EU-27 apple imports originated from the southern hemisphere (Chile, New Zealand, South Africa, Brazil, and Argentina) and occurred mostly counter seasonally to European production. Imports were 14% lower than in MY2019/20, mostly as a result of lower imports in Belgium, the Netherlands, Hungary, and France.

The Netherlands was the largest importer accounting for 32% of EU-27 imports in MY2020/21. However, much of the volume entering the Netherlands is not consumed there, as it is eventually transshipped to other member states. Other member states with significant import volumes included Ireland, Germany, Bulgaria, France, and Belgium with 11%, 9%, 9%, 7%, and 6% of EU imports, respectively.

The United States lost the EU market due to technical issues linked to the use of *morpholine* as an additive in waxes and *diphenylamine* (DPA) – a post-harvest treatment for storage scald. Since the EU MRL for DPA was lowered in March 2014 only exporters with designated DPA-free facilities are able to export to the European Union. In recent years, virtually all U.S. apples exported to Europe were going into the UK and consisted of organic apples. Prior to the lowering of the MRL for DPA, the Netherlands, Spain, and Italy also imported apples from the United States, albeit in small amounts.

EU27 Imports of Apples in MT

Country of Origin	MY 2018/19	MY 2019/20	MY 2020/21	Change MY 2020/21 To MY 2019/20	Share of Total Imports In MY2020/21
Chile	114,585	112,546	101,950	-9%	31%
New Zealand	81,801	74,907	54,375	-27%	17%
North Macedonia	43,280	44,314	40,174	-9%	12%
South Africa	27,991	29,437	36,956	26%	11%
United Kingdom	52,890	21,506	28,648	33%	9%
Serbia	6,754	39,475	22,847	-42%	7%
Brazil	21,467	9,388	13,146	40%	4%
Argentina	15,826	16,528	11,982	-28%	4%
Ukraine	9,872	7,248	3,692	-49%	1%
Albania	5,770	8,029	3,083	-62%	1%
United States	114	0	0	0%	0%
Other	8,121	14,402	7,772	-46%	2%
World total	388,471	377,780	324,625	-14%	

Note: The table is grouped by ranking in MY 2020/21. Due to rounding percentages add up to marginally below 100 percent.

Data source: Trade Data Monitor, LLC (TDM) accessed on September 17, 2021

Apples, Exports

In MY2021/22, EU apple exports are forecast to decrease by about 20,000 MT (translating into 2%) as a result of lower production in Italy, France, and Greece. These are three of the top five member states when it comes to EU apple exports to destinations outside of the European Union. In MY2020/21, they

accounted for 34%, 12%, and 6% of total EU apple exports, respectively. In response to the Russian import ban, EU exporters looked at increasing exports to other destinations (Eastern Europe, Northern Africa, the Middle East, and Brazil) with varying success. Those countries that were most successful either have the right variety mix (*Gala*, *Granny Smith*, *Golden Delicious*, *Red Delicious*) and/or were able to build on efforts to open new markets that they started well before the Russian import ban. For example, efforts to open or expand to new or nascent markets proved successful in India. Italy, Poland, France, Spain, Belgium, Germany, and Greece are already exporting to India. France was able to increase its exports to Northern Africa, the Middle East, and Asia, as a result of intensified promotional activities in those regions. Since the start of the pre-clearance program in October 2014, Italy and France are eligible for export to the United States. In MY 2020/21, France exported 42 MT to the United States. Poland has concluded agreements with Vietnam and a number of other Asian countries.

EU27 Exports of Apples in MT

Country of Destination	MY 2018/19	MY 2019/20	MY 2020/21	Change MY 2020/21 To MY 2019/20	Share of Total Imports in MY2020/21
Egypt	268,096	250,793	265,082	6%	25%
United Kingdom	184,448	184,277	189,380	3%	17%
Belarus	199,159	152,187	117,715	-23%	11%
Saudi Arabia	81,882	78,887	64,002	-19%	6%
India	76,584	48,154	54,340	13%	5%
Kazakhstan	84,938	59,798	49,390	-17%	5%
Jordan	52,901	40,118	37,321	-7%	3%
Norway	34,978	32,992	36,512	11%	3%
United Arab Emirates	46,515	37,736	27,857	-26%	3%
Brazil	24,894	24,887	27,011	9%	2%
Israel	19,137	21,736	25,572	18%	2%
Switzerland	15,776	18,580	16,466	-11%	2%
Colombia	10,429	19,188	13,860	-28%	1%
Ukraine	17,138	19,509	11,310	-42%	1%
Bosnia and Herzegovina	19,661	18,197	11,280	-38%	1%
Serbia	23,903	12,103	8,883	-27%	1%
Libya	15,629	10,969	8,131	-26%	0,9%
United States	24	22	101	359%	0.01%
Other	182,825	168,018	119,401	-29%	11%

World total	1,358,917	1,198,151	1,083,614	-10%	
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Note: The table is grouped by ranking in MY 2020/21. Due to rounding percentages add up to marginally less than 100 percent.

Data source: Trade Data Monitor, LLC (TDM) accessed on September 17, 2021

The five largest EU exporters together accounted for 94% of EU apple exports in MY 2020/21. These were Italy (to Egypt, Saudi Arabia, India, UK, and Norway), Poland (mostly to Belarus, Egypt, Kazakhstan, Jordan, and the UK), France (mainly to the UK, UAE, Saudi Arabia, Vietnam, Colombia, and Israel), Greece (mainly to Egypt, Jordan, Albania, Saudi Arabia, and Israel), and Spain (mostly to the UK, Morocco, Mauritania, Colombia, Brazil, and the Middle East.)

In some large foreign markets, EU and U.S. suppliers compete. These include:

Market	EU countries competing with U.S. apples
Saudi Arabia	Italy, France, Greece, Poland, Spain
UAE	France, Italy, Spain
India	Italy, Poland, France, Belgium, Spain

Apples – Additional Information

For information on tariffs, maximum residue levels, and labeling requirements please see the respective sections at the end of the report.

Pears, Fresh

Coordinated by Marcel Pinckaers/FAS The Hague

Production, Supply, and Distribution

Pears, Fresh Market Year Begins	2019/2020		2020/2021		2021/2022	
	Jun 2019		Jun 2020		Jun 2021	
	USDA Official EU27+UK	New Post EU27	USDA Official EU27+UK	USDA Official EU27+UK	New Post EU27	USDA Official EU27+UK
European Union						
Area Planted (HA)	116,059	115,504	115,770	111,959	0	111,838
Area Harvested (HA)	111,505	109,902	110,173	107,678	0	106,695
Commercial Production (MT)	1,964,701	1,963,510	2,217,834	2,246,156	0	1,623,531
Non-Comm. Production (MT)	96,718	95,316	119,050	134,924	0	103,475
Production (MT)	2,061,419	2,058,826	2,336,884	2,381,080	0	1,727,006
Imports (MT)	182,700	171,643	190,000	174,553	0	190,000
Total Supply(MT)	2,244,119	2,230,469	2,526,884	2,555,633	0	1,917,006
Domestic Consumption (MT)	1,939,219	1,824,041	2,256,884	2,179,829	0	1,667,006
Exports (MT)	304,900	406,428	270,000	375,804	0	250,000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	2,244,119	2,230,469	2,526,884	2,555,633	0	1,917,006
(HA), (1000 TREES), (MT)						

Sources: Trade for MY 2019/20 and 2020/21: Trade Data Monitor, LLC (TDM) accessed in September 2021; All other: FAS EU posts

Pears – Production**Pears – Commercial Production**

This year's growing season differed from last year. Temperature in the southern part of the EU was lower than average, while the Nordic region saw temperatures rise. There was no water deficit, especially compared to the two previous warm and dry years. MY 2021/22 EU commercial pear production is forecast to decrease by nearly 28% (or 622,625 MT) compared to MY 2020/21. Two years ago, commercial production was low as well due to lower harvest volumes in Italy. This year, commercial production (1,623,531 MT) is expected to be the lowest in many years due to low harvest volumes in Italy, Belgium, the Netherlands, and France. Commercial production numbers for the Iberian

Peninsula presented a different picture. Portugal saw a significant increase in production while the harvest in Spain is expected to be almost similar to last year. The Netherlands, Spain, Belgium, Italy, and Portugal continue to lead pear production in the EU. Combined, they represent 81% of total EU commercial production in MY 2021/22.

Between MY 2015/16 and MY 2019/20, the total EU area harvested remained relatively unchanged at roughly 111,000 hectares. However, in MY 2020/21 the area harvested decreased by over 2,224 hectares (or 2%), driven by a reduction in harvested areas in Spain and Italy. For MY 2021/22, the harvest area is forecast to further decline, albeit at a slower pace, by 983 hectares (or 1%).

EU Commercial Pear Production by Country and Year in MT

Country	MY 2019/20	MY 2020/21	MY 2021/22e	Change 2021:2020	Share of Total EU Production in 2021
The Netherlands	373,000	400,000	325,000	-19%	20%
Spain	325,207	302,707	295,788	-2%	18%
Belgium	322,000	383,000	290,000	-24%	18%
Italy	363,000	611,000	213,000	-65%	13%
Portugal	202,000	139,000	189,000	36%	12%
Poland	68,000	74,000	75,000	1%	5%
France	120,000	144,000	62,000	-57%	4%
Greece	76,270	77,484	60,000	-23%	4%
Germany	42,477	39,270	42,000	7%	3%
Romania	22,000	21,000	22,000	5%	1%
Other	49,556	54,695	49,743	-9%	3%
Total Production	1,963,510	2,246,156	1,623,531	-28%	

e = estimated; Source: FAS/EU

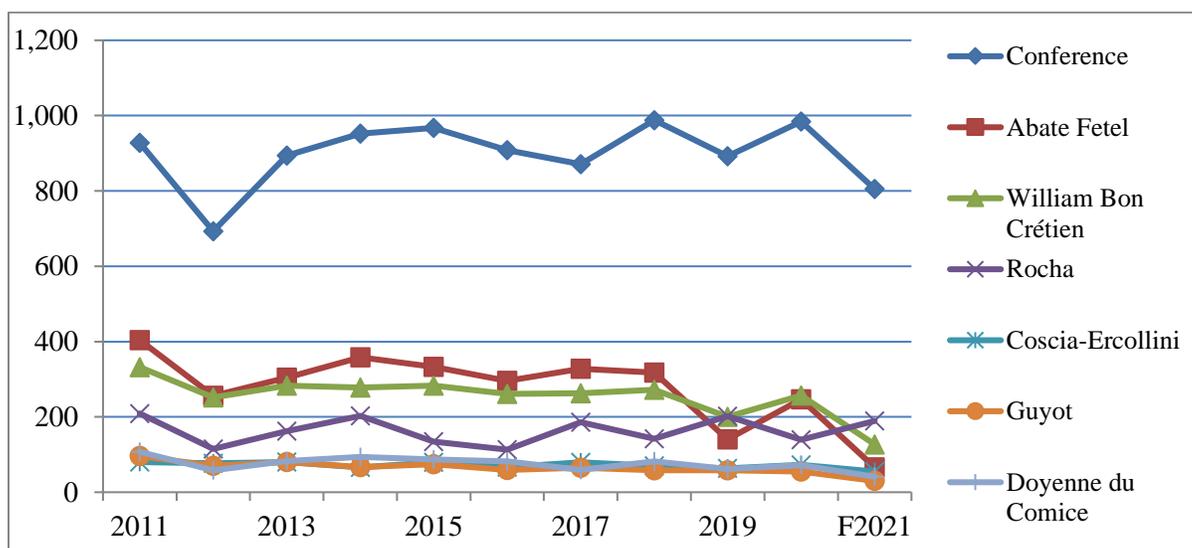
- The planted area for pears in the Netherlands has grown year-by-year and surpassed 10,000 hectares two years ago. Acreage is forecast to stabilize at 10,100 hectares. Production is mainly composed of the *Conference* variety. Dutch production is expected to drop by 19% due to fewer pears per tree. This drop is a direct result of unfavorable growing conditions early in the growing season. Spring 2021 was cold, with some snow. This cold weather remained for a long period of time after flowering. Additionally, fruit setting was not optimal, and harvesting will be late this year. As there will be fewer pears, the size is expected to be slightly bigger. Color, taste, and keeping quality are expected to be good this year.
- Supported by the Spanish Ministry of Agriculture, the Spanish pear sector is focused on developing new and sustainable fruit varieties, improving fruit quality, digitalization, and green

packaging. The region of Catalonia continues to lead Spain's pear production; with around 45% of the total, followed by La Rioja and Aragon. The main pear varieties grown in Spain are *Conference*, *Blanquilla*, *Ercolini*, *Limonera*, and *William's*. Between 2009 and 2019, total planted area decreased by 26%, standing at 20,600 ha in 2019 as stone fruit orchards replaced pear orchards. For MY 2021/22, commercial pear production is forecast to decline by 2%, as a result of heavy frost and rainstorms that occurred in early April in the major Spanish pear-producing regions with a notable physiological fall of the earliest pears varieties, such as *Limonera* and *Ercollini*. In addition, strong rainfalls that occurred in some Spanish regions in late August affected some later pear varieties, such as *Conference* and *Blanquilla*. The quality of Spanish pears is expected to be good this year.

- After 20 years of growth, in MY 2021/22 the planted area in Belgium is expected to decrease and total 10,450 hectares. Belgian pear production, which is mainly composed of *Conference* pears, is concentrated in Flanders and is expected to decrease by 93,000 MT, or almost 25%. Bad weather conditions (wet and cold period after flowering) during the spring resulted in this year's lower harvest. Also the shedding of pears in June, meaning that the trees discarded some unripe pears, was higher than usual. Frost during the spring did not have an effect on production, nor did the heavy rainfall in mid-July 2021. Flooding in the areas around Belgium's border with the Netherlands and Germany had no influence on production because pear orchards are not located in low-lying areas, which were the areas that were impacted by the flooding. The quality (colour, taste, and storage quality) of Belgian pears is expected to be very good this year.
- Italy is the EU member states with the largest pear area planted. Emilia-Romagna continues to be Italy's main pear producing area, accounting for almost three-quarters of Italy's total pear production. For the past few years, the planted area of pears dropped by 1% to 2% per year. In MY 2021/22 the area planted is estimated at 26,989 hectares. The significant drop in production by 65% compared to MY 2020/21 is primarily attributed to severe frost during flowering at the end of March and early April. Additionally, the presence of the brown marmorated stink bug resulted in Italian pears being damaged and deformed. Only pear orchards with anti-insect nets were able to fully protect their production. Brown spot disease led to a decline in commercial production as well. Production decreases are expected for all varieties, which are *Abate Fetel* and *William Bon Crétien/Bartlett*, followed by *Coscia-Ercollini* and *Conference*. Due to the favorable growing conditions during the remaining growing season, the quality of the harvested pears is expected to be good to excellent.
- The Portuguese pear sector is committed to improving itself through increasing investments in innovation, efficiency, and exports (see [GAIN Report](#)). Portuguese pear orchards are in good condition, which has resulted in an increase in productivity. Over the past three years, Portugal's harvest area for pears has held steady at 12,500 ha. Pear production is expected to rebound from the strong decline in MY 2020/21. The overall pear quality and size is expected to be average-to-

good. The unique pear variety growing in Portugal is *Rocha*. Portuguese pear production continues to be higher than consumption, making Portugal a net exporter.

EU Pear Production for Selected Varieties in 1000 MT



F = forecast, Data source: WAPA data

About half of all pears grown in the EU in MY 2021/22 were *Conference* pears, mainly grown in Belgium, the Netherlands, and Spain. Other popular varieties are *Rocha* (grown in Portugal) and *William Bon Crétien/Bartlett* (grown in Italy, Spain, and France) followed by *Abate Fetel* (grown in Italy) and *Coscia-Ercollini* (grown in Italy and Spain). There continues to be a growing interest among Dutch and Belgian growers to start producing club varieties (those that have its patent, trademark, and marketing protected) such as *Migo*®, *Sweet Sensation*®, and *Red Conference*®.

Pears – Non-Commercial Production

Non-commercially produced pears include pears grown in home gardens and meadows. If they are harvested, these pears are often consumed domestically (both fresh consumption and processing). Austria, the Czech Republic, Romania, and Slovenia have non-commercial production volumes, which account for 50% or more of total pear production in their countries. The estimated 23% decline in non-commercial pear production in MY 2021/22 is in line with the decline of commercial pear production. This year's EU non-commercial volume is similar to non-commercial production numbers in MY 2017/18 and MY 2019/20. Austria and Romania alone were responsible for two-thirds of this production.

Pears – Consumption

EU pear consumption in MY 2021/22 is expected to decrease due to this year's smaller domestic supply. The per-capita consumption of pears fluctuates from year-to-year depending on availability and, for some member states, price. The average per-capita consumption of pears in the EU is estimated between three and four kilograms per year. Per capita consumption also varies between member states with the highest consumption volumes found in the leading pear producing countries. For example, Italy, Portugal, the Netherlands, Greece, Spain, and Belgium have the highest per capita consumption of pears.

The lowest per capita consumption markets in the EU, at 2 kg per year or less, are Hungary, Slovakia, Poland, and Lithuania. Consumers also seem to be increasingly buying healthier and more unprocessed and fresh foodstuffs. Pears are benefitting from this consumer trend. The impact of the COVID-19 pandemic on pear consumption was minimal, for details please refer to the COVID-19 section at the beginning of this report.

Within the EU member states, the most popular pear varieties are often those that are grown regionally. Food retailers offer, on average, two or three different pear varieties. *Conference* pears have gained popularity in the German market (which used to be dominated by *Abate Fetel*). With a lower availability of *Abate Fetel* this year, trade experts expect *Conference* pears to further conquer the German market. Taste, appearance, and texture are the main consumer considerations when buying pears. There is a trend, especially among consumers in Northwest Europe, towards preferring somewhat smaller-sized pears. Additionally, the demand for organic pears continues to grow – particularly in large organic consumer markets like Switzerland, Denmark, Sweden, Luxembourg, and Austria.

Processing

The vast majority of professional growers produce pears primarily for the fresh consumer market. Some pears, however, are not suitable for the fresh market due to their size, shape, skin quality, or overall quality. These pears are often used for baking, juice, and canning. Pears not suitable for human consumption (both fresh and further processing) normally are used for animal feed or fermentation. Prices for fresh pears also influence the volume used for processing. In MY 2021/22, processing volumes are expected to drop to 125,000 MT due to the good quality of this year's pears.

Austria and Spain are forecast to have the highest processing volumes within the EU this year. However, Austria only expects to process 35,000 MT, a third less compared to last year. This drop is a direct result of lower non-commercial pear production numbers. Most Austrian pears that go into processing are used to make Perry (or pear cider) an alcoholic beverage made from fermented pears. In Spain, pears are processed into fruit jelly and used by the canning industry.

Pears – Trade

EU External Trade

The impact of measures taken to combat the pandemic on international pear trade is limited. The industry incorporated these new measures and continued to trade. The higher prices of sea containers, due to the blockade in the Suez Canal and the temporarily closure of major ports in China, have made EU pear trade with countries, especially in South and East Asia, more expensive.

To date Brexit has not had much of an impact on EU pear trade as Dutch and Belgian traders were well prepared to deal with the additional paperwork as a result of the UK leaving the EU. This might change when the UK starts introducing phytosanitary certification obligations and physical checks on July 1, 2022.

Imports

Imported pears represent less than 10% of the total EU pear supply, and normally end up in the EU's fresh market. The EU predominantly imports pears from Southern Hemisphere countries -- such as South Africa, Argentina, and Chile (see the table below). According to TDM, LLC, imports from these countries normally begin in February, directly after the harvest in these countries, peaks in April, and normally ends in July (this was true for MY 2020/21 as well). Popular imported varieties include *Packham*, *Williams Bon Crétien*, *Forelle*, and *Abate Fetel*.

The Netherlands and Italy together accounted for over two-thirds of the EU's pear imports. Most of the volume entering the port of Rotterdam, is shipped to other member states and in particular to Germany, Poland, France, and Belgium, while Italy's imports predominantly stay in the Italian market. Other importing member states, albeit on a much smaller scale, are Spain, Romania, Germany, and France.

Historically, the EU supplies export markets with EU-grown pears, supplemented by imported pears. In recent years, Russia and several other former EU export markets are increasingly importing from Southern Hemisphere countries directly. As a result, EU pear imports dropped by a quarter between MY 2015/16 and MY2018/19. In MY 2019/20, this trend changed, and pear imports increased due to the reduced availability of EU grown pears. In MY 2020/21, EU pear imports stabilized compared to MY 2019/20, despite the increased local availability of pears.

For MY 2021/22 imports from Southern Hemisphere countries could be somewhat up due to the lower commercial production numbers for pears. Due to its overall good quality, relatively more EU pears are expected to end up on the fresh consumer market this year.

EU Import of Pears in MT

Country of Origin	MY 2018/19	MY 2019/20	MY 2020/21	Change MY 2020/21 to MY 2019/20	Share of Total Imports in MY 2020/21
South Africa	60,021	56,282	60,320	7%	35%
Chile	39,021	40,305	44,512	10%	26%
Argentina	39,972	49,218	42,193	-14%	24%
Turkey	5,016	9,726	13,283	37%	8%
China	7,693	11,583	8,573	-26%	5%
Serbia	1,342	1,314	2,105	60%	1%
United Kingdom	1,009	1,054	1,355	29%	1%
Bosnia & Herzegovina	1,501	1,017	1,250	23%	1%
Uruguay	949	225	600	167%	0%
Australia	0	0	103		0%
Other	40,604	50,137	42,452	-15%	24%
Total	157,156	171,643	174,553	2%	

Data source: Trade Data Monitoring (TDM) accessed in September 2021

Turkey is gaining prominence on the import market and is now the EU's fourth largest supplier of pears. Imports from Turkey in MY 2020/21 were a tenfold of import numbers in MY 2015/16. Romania and Bulgaria dominate pear imports from Turkey. These pears are often re-exported.

China is the EU's fifth largest supplier of pears. It ships Asian pears, including the popular *Ya* variety, which is predominantly consumed by the Asian population in the EU. Annual imports from China on average total around 10,000 MT and are not expected to change much in MY2021/22. Imports of pears from the United States have continued to decline, and are currently non-existent due to the EU's strict maximum residue levels for pesticides.

Exports

With some former export markets increasingly buying from Southern Hemisphere countries, EU pear exports are largely comprised of pears produced in the EU. Pear exports have been stable at around 415,000 MT for each of the past six MYs, except in MY 2017/18 when pear exports were higher due to a high availability of good-quality pears produced within the EU. For MY 2020/21, EU pear exports dropped by almost 8% (30,624 MT) compared to MY 2019/20 driven by lower exports to Brazil and, to a lesser extent, Belarus.

Belarus is the largest export market for EU pears, but other countries that have proximity to Russia, including Kazakhstan and Ukraine, are also important markets for Dutch and Belgian Conference pears. In MY2020/21 exports to Belarus dropped by 7,408 MT while exports to Ukraine and Kazakhstan grew by 1,002 MT and 550 MT, respectively. With lower production volumes in both the Netherlands and Belgium, EU exports to former Soviet Republics are expected to decrease in MY 2021/22.

The UK is the EU's second largest export market. Exports were just over 100,000 MT for the last six marketing years. For MY 2021/22, EU pear exports to the UK and other solid and mature consumer markets in Europe, such as Norway and Switzerland, are not expected to change much in MY 2021/22.

Pear exports to Brazil dropped in MY 2020/21, which was a direct result of Portugal's poor pear harvest. Portugal's *Rocha* pears are popular in Brazil. Despite the good harvest forecast for MY2021/22 in Portugal, EU pear exports to Brazil are not expected to rebound much in MY2021/22. More likely, Portuguese pears will stay on the EU market, a market that cannot be fully served by Italy this year due to its drop in commercial production.

Over the past few years, EU pear exports to Hong Kong have decreased and trade to China has, in turn, increased. In MY 2019/20, exports to China fell 14% due to lower export volumes during the first four months of calendar year (CY) 2020, which was the direct result of the COVID-19 pandemic. Exports to China did not pick up in MY 2020/21 and are expected to decrease further in MY 2021/22 due to the small harvest forecast, higher prices of sea containers, and uncertainties concerning COVID-19.

EU Export of Pears in MT

Country of Destination:	MY 2018/19	MY 2019/20	MY 2020/21	Change MY 2020/21 to MY 2019/20	Share of Total Exports in MY 2020/21
Belarus	117,181	120,009	112,691	-6%	30%
United Kingdom	109,935	101,559	105,897	4%	28%
Morocco	39,258	38,816	33,320	-14%	9%
Brazil	48,226	42,882	24,398	-43%	6%
Norway	15,650	12,829	13,418	5%	4%
Kazakhstan	12,961	12,446	12,996	4%	3%
Ukraine	2,700	6,385	7,387	16%	2%
Switzerland	6,036	5,967	6,902	16%	2%
Bosnia & Herzegovina	10,573	8,105	6,708	-17%	2%
China	7,711	6,641	6,581	-1%	2%
Saudi Arabia	4,836	5,827	5,571	-4%	1%
Israel	4,594	5,650	3,627	-36%	1%
Libya	3,991	4,748	3,436	-27%	1%
Jordan	1,269	2,381	3,286	38%	1%
UAE	2,612	3,293	3,004	-9%	1%
Serbia	2,849	3,183	2,787	-12%	1%
Canada	2,712	2,731	2,652	-3%	1%
Senegal	1,751	1,829	2,556	40%	1%
Other	25,352	21,057	18,587	-12%	1%
Total	420,197	406,428	375,804	-8%	

Data source: Trade Data Monitoring, LLC (TDM) accessed in September 2021

Due to the existing Russian import ban, rising prices of sea containers, Brexit, and uncertainties due to the COVID-19 pandemic, EU pear traders, more than before, looked at ways to diversify risk. Supplying stable and nearby markets seems to have gained importance among European traders, but they are expected to continue to keep an eye open for new markets on other continents (especially in South East Asia and Latin America). However, it will take several years to develop a new, sustainable market, particularly for varieties that are unknown to consumers in new markets.

Pears – Prices

Producer prices for pears are expected to be good this year, driven by a decrease in EU pear production; the opening and growing importance of new export markets; the good quality of this year's pears; and the solid domestic demand for healthy, nutritious, unprocessed, and fresh products. Retail prices are expected to be somewhat up due to this year's lower harvest but also as a result of higher prices for raw materials, and in particular for packing material and wood products.

Pears – Additional Information

For information on tariffs, maximum residue levels, and labeling requirements, please see the respective sections at the end of this report.

Table Grapes, Fresh

Coordinated by Ornella Bettini/FAS Rome

Production, Supply, and Distribution

Grapes, Fresh Table Market Year Begins	2019/2020		2020/2021		2021/2022	
	Jun 2019		Jun 2020		Jun 2021	
	USDA Official EU27+UK	New Post EU27	USDA Official EU27+UK	New Post EU27	USDA Official EU27	New Post EU27
European Union						
Area Planted (HA)	95,199	95,335	95,320	95,590	0	95,670
Area Harvested (HA)	90,171	90,581	90,652	91,049	0	90,667
Commercial Production (MT)	1,564,743	1,539,159	1,394,000	1,364,565	0	1,377,950
Non-Comm. Production (MT)	8,521	8,521	8,500	6,900	0	8,000
Production (MT)	1,573,264	1,547,680	1,402,500	1,371,465	0	1,385,950
Imports (MT)	677,100	500,600	725,000	570,000	0	570,590
Total Supply (MT)	2,250,364	2,048,280	2,127,500	1,941,465	0	1,956,540
Fresh Dom. Consumption (MT)	2,172,264	1,871,580	2,047,500	1,768,465	0	1,786,540
Exports (MT)	78,100	176,700	80,000	173,000	0	170,000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT) (HA), (MT)	2,250,364	2,048,280	2,127,500	1,941,465	0	1,956,540

Data sources: Trade for MY 2019/20 and 2020/21: Trade Data Monitor, LLC (TDM) accessed in September 2021.

All other: FAS/EU estimates

Table Grapes – Commercial Production

The EU is a world leader in table grape production with Italy, Spain, and Greece accounting for 92% of the EU's total production. In MY 2021/22 (June/May), EU table grape commercial production is forecast up slightly from the previous season, mostly due to volume increases in Italy, thanks to dry temperatures in May and the first two weeks of June that favored fruit setting. Production increases are also forecast in Spain, Romania, Portugal, and Bulgaria. Conversely, decreased volumes are forecast in Greece and France due to unfavorable weather. Overall, fruit quality is forecast to be excellent with higher sugar content due to hot temperatures in July, August, and early September. MY 2021/22 EU table grape area is forecast to keep the upward trend thanks to new investments in seedless varieties in

Italy (mainly in the Puglia region), in Spain (in the region of Murcia), and in Portugal (in the Ribatejo and Alentejo regions), driven by an increasing demand from intra-and-extra EU markets.

EU Commercial Table Grape Production by Country and Year in MT

COUNTRY	MY 2019/20	MY 2020/21	MY 2021/22e	Change 2021:2020	Share of Total EU Production in 2021
Italy	830,000	670,000	720,000	8%	52%
Spain	314,140	297,800	300,000	0.7%	22%
Greece	273,266	276,509	250,000	-10%	18%
Romania	48,200	46,000	47,500	3.3%	3.4%
France	45,000	46,000	32,000	-30%	2.3%
Portugal	16,710	15,880	16,000	0.8%	1.2%
Bulgaria	11,843	12,376	12,450	0.6%	1.0%
Total	1,539,159	1,364,565	1,377,950	1%	

e= estimated; due to rounding percentages add up to marginally less than 100 percent.

Source: FAS/EU

- Table grape production in Italy is concentrated in the south, mainly in Puglia and Sicily, which account for 74% and 25% of the domestic production, respectively. *Italia*, *Victoria*, *Palieri*, and *Red Globe* are the main seeded varieties, covering approximately 70% of the table grape area. Early varieties (*Black Magic* and *Vittoria*) are sold from May to the end of July. For medium and late varieties (*Italia*, *Palieri*, *Pizzutello Bianca*, and *Red Globe*)—mainly from Sicily, Abruzzo, Puglia, Basilicata, and Sardinia—the harvest occurs from August to December. Seedless varieties (*Sugraone*, *Crimson*, *Thompson*, *Sublime*, etc.) represent approximately 35% of the domestic production, but are forecast to increase significantly in the coming years.
- In Greece, there are approximately 17,000 hectares currently cultivated with table grapes. The main producing areas include the prefectures of Corinth in Peloponnese; Kavala in Macedonia; Tyrnavos in Thessaly; and Heraklion on the island of Crete. *Sultana* (*Thompson Seedless*) and *Victoria* are the leading varieties, with *Crimson Seedless* and *Superior Seedless* gaining popularity. Moreover, a greater focus is now being placed on diversifying Greece's grape offer to extend the marketing season into October and November.
- In Spain, there are approximately 14,665 hectares currently cultivated with table grapes. The main area of production is the region of Murcia, accounting for 70% of total production, followed by Alicante and Seville. Over 50 table grape varieties are commercialized in Spain. *Apirena* (*Crimson seedless*, *Superior seedless*, and *Flame seedless*), *Aledo*, *Muscatel*, and *Red Globe*, are the main ones. *Apirena* seedless varieties represent 40% of the domestic production and are mainly cultivated in the region of Murcia and Alicante. Spain is the major EU producer of seedless table grapes with increasing interest in export markets. In the last decade, new seedless varieties (*Superior*, *Sugraone*, *Sunworld*, *Ifg*, *California Grapes*, and a Spanish variety owned by the grape growers *ITUM*) were planted replacing older varieties.

Table Grapes – Non-Commercial Production

EU table grape non-commercial production includes table grapes grown in home gardens, meadows, or field edges. MY 2021/22 EU table grape non-commercial production is forecast to increase by approximately 16% compared to the previous season due to higher volumes in Romania (up 17%), thanks to favorable weather. Volumes in Bulgaria are expected to remain flat.

Table Grapes – Consumption

In MY 2021/22, EU fresh grape consumption is forecast slightly up from the previous season, driven by Italy's increased production and a recovering HRI demand as the COVID-19 pandemic slows down. Starting in June and throughout the end of the calendar year, EU fresh grape consumption is mostly supplied by domestic production. Imports from third countries—normally coming in the first half of the calendar year from the Southern hemisphere—represent approximately 25% of total consumption.

Germany, Italy, Greece, Spain, and France remain the leading table grape consumers in the EU, followed by Romania, Portugal, Czech Republic, Austria, Bulgaria, Croatia, Slovakia, and Slovenia. Despite the fact that Italian seeded grapes are still widely consumed, EU consumers are increasingly demanding seedless varieties (*Sugraone, Crimson, Thompson, Regal, Summer Royal, Centennial, Sublime, etc.*)

Table Grapes – Trade

Imports

Unlike with apples and pears, the EU is a net importer of fresh table grapes. MY 2021/22 EU table grape imports are forecast slightly up, driven by a recovering domestic demand. During MY 2020/21, EU table grape imports increased by approximately 14% from the previous season, compensating for a reduced domestic production. The largest EU importing countries remain the Netherlands and Germany. These are followed by France, Poland, Spain, Romania, Czech Republic, Belgium, Austria, Portugal, Slovenia, Italy, Slovakia, Croatia, and Bulgaria. The Netherlands serves mainly as a trans-shipping point.

EU Imports of Table Grapes in MT

Country of Origin	MY 2018/19	MY 2019/20	MY 2020/21	Change MY 2020/21 to MY 2019/20	Share of Total Imports in MY 2020/21
South Africa	135,887	143,612	177,519	24%	31%
Peru	81,287	76,360	99,219	30%	18%
India	94,639	73,192	84,162	15%	15%
Chile	63,148	59,493	48,640	-18%	9%
Egypt	32,597	47,789	47,805	0,03%	8%
Turkey	22,560	27,231	29,994	10%	5%
Brazil	27,149	21,051	25,869	23%	5%
Namibia	18,933	16,377	23,076	41%	4%
Moldova	16,572	19,217	16,117	-16%	3%
North Macedonia	5,325	3,880	6,362	64%	1%
United States	414	169	107	-36%	0,02%
Other	20,946	12,193	11,090	-9%	2%
Total	519,457	500,564	569,960	14%	

Source: Trade Data Monitor, LLC (TDM) accessed in September 2021

Due to rounding percentages add up to marginally more than 100 percent.

Exports

MY 2021/22 EU table grape exports are forecast slightly down as a result of high transportation costs and discouraging bureaucratic delays. During MY 2020/21, EU table grape exports declined by 2% from the previous season, mainly due to lower volumes to the United Kingdom. Seedless varieties (*Sugar Crisp*, *Sweet Sunshine*, *Sweet Celebration*, *Sweet Sapphire*, *Jack's Salute*, and *Cotton Candy*) are mainly sent to the UK and the UAE. Spanish table grape exporters are still developing newly opened markets in China and Vietnam.

EU Exports of Table Grapes in MT

Country of Destination	MY 2018/19	MY 2019/20	MY 2020/21	Change MY2020/21 to MY2019/20	Share of Total Exports in MY 2020/21
United Kingdom	114,384	98,599	95,278	-3%	55%
Switzerland	26,894	24,730	27,779	12%	16%
Norway	15,158	16,256	17,121	5%	10%
Ukraine	2,424	2,550	2,865	12%	1,7%
Bosnia & Herzegovina	2,323	2,932	2,825	-4%	1,6%
South Africa	3,270	3,059	2,600	-15%	1,5%
Russia	2,549	1,806	2,590	43%	1,5%
Albania	3,217	3,195	2,513	-21%	1,5%
Saudi Arabia	1,796	2,076	2,232	8%	1,3%
Belarus	2,674	2,005	1,927	- 4%	1,1%
United States	712	1,004	1,363	36%	0,8%
Other	17,786	18,444	13,925	-25%	8%
Total	193,187	176,656	173,018	-2%	

Data source: Trade Data Monitor, LLC (TDM) accessed in September 2021; due to rounding percentages add up to marginally more than 100 percent.

Table Grapes – Additional Information

For information on tariffs, maximum residue levels, and labeling requirements, please see the respective policy sections at the end of the report.

Policy

Coordinated by Tania De Belder/USEU/FAS Brussels

Overview

Over the past year, the COVID-19 pandemic, the European Green Deal, the Common Agricultural Policy reform (CAP), and Brexit consumed EU agricultural policy makers in Brussels. In particular, the COVID-19 pandemic shaped EU policy making and politics with concerns over resilient supply chains and sustainability. These trepidations influenced the Green Deal's agri-food vision under the Farm to Fork (F2F) and Biodiversity Strategies and sparked debates over CAP reform. Other issues concerning changes in pesticide regulations and agricultural bans may have influenced global fruit trade as well.

The Farm to Fork Strategy

The F2F Strategy highlights 27 actions aimed at transforming the way EU food is produced, processed, transported, presented, and sold. The full strategy is available [here](#). The F2F Strategy seeks to position the EU's food systems on a more sustainable path. At the production level, the Commission proposes actions to reduce the overall use and risk of chemical pesticides by 50% by 2030 as well as the reduction of the use of fertilizers by at least 20%, among other cuts. Additionally, the Commission is aiming for 25% of agricultural lands to be used for organic farming, up from the current 8%. See [GAIN report: Pesticides Initiatives in the EU Farm to Fork Strategy](#) for more information. The reduction of pesticide use could affect the availability of active substances for fresh deciduous fruit producers in the EU and associated maximum residue levels (MRLs). This in turn could incur potential trade implications with regard to imports of fresh deciduous fruit into the EU.

Biodiversity Strategy

The Biodiversity Strategy provides a broad focus on nature conservation and tackling biodiversity loss in the EU and globally. The two main pesticide reduction initiatives presented in F2F are emphasized in the Biodiversity Strategy and complemented by the Biodiversity Strategy's pledge to review and possibly revise the EU 2018 Pollinators Initiative. This Strategy also aims for further soil and nature conservation by setting aside a minimum of 10% of the existing agricultural area into higher biodiversity landscape features, such as buffer strips and rotational and non-rotational fallow land. The Commission's proposed conservation measure is nested within the over-arching target of the Biodiversity Strategy to protect 30% of all EU land. See [GAIN report: Green Deal Strategies for the EU Agri-Food Sector Present a Politically Ambitious Policy Roadmap](#).

Common Agricultural Policy Reform

Fresh deciduous fruits fall under the EU fruit and vegetables regime and are part of the Common Agricultural Policy (CAP). Established in the 1958 Treaty of Rome, the CAP continues to be the EU's principal agriculture sector legislative framework. It currently supports approximately 10.5 million farms and thousands of rural communities across the EU. At the July 2020 European Council summit,

EU heads of state and government allocated €344 billion⁹ for the CAP under the 2021-2027 Multi-annual Financial Framework, comprising 32% of the overall 2021-2027 budget.

Every five to seven years, the Commission begins multi-year stakeholder consultations on the next CAP, adjusting the framework to social and political priorities and gradually modifying the way farming operates in the EU. The Commission drafts the initial CAP proposal, which is provided to the European Parliament (EP) and Council who deliberate and vote to accept or amend the Commission's proposal. Agricultural sector stakeholder consultations for the current CAP proposal began in 2018. On June 25, 2021, the Parliament, Council and Commission reached a provisional political agreement on the new CAP, which will enter into force in 2022. Technical discussions still have to take place between the three institutions. At the time of writing no texts of the new CAP are publicly available.

Marketing Standards

Fresh fruit and vegetable imports into the EU also have to comply with EU-harmonized marketing standards. These standards apply at all marketing stages and include criteria such as quality, size, labeling, packaging, and presentation. [Commission implementing Regulation \(EU\) No 543/2011](#) provides for a general marketing standard for all fresh fruits and vegetables. Specific marketing standards are still in place for ten products, including apples and pears, and are set out in Part B of Annex I to this Regulation: for apples in Part 1 of that same section on page 95 and for pears in Part 6 on page 129.

European School Fruit, Vegetables and Milk Scheme

The European "School Fruit Scheme" originated in 2009 as a measure to combat child obesity. It includes three elements: free distribution of fruit and vegetables in schools, informational campaigns on healthy eating habits, and monitoring and evaluation. The total EU budget for the scheme, in the period 2017-23, was set at €250 million¹⁰ per school year of which up to €150 million¹¹ was allocated for fruit and vegetables and up to €100 million¹² was set aside for milk. This budget is broken down by country based on the number of children and the level of regional development. More information about the EU budget by country for the 2021/2022 school year can be found [here](#).

In addition to the school fruit scheme, fruit and vegetable consumption is also encouraged through the EU's promotional budget for agricultural products and quality schemes. The Commission reformed its promotion policy with an extension of the product scope and a greater focus on export markets. For 2021, the European Commission allocated a total of €182.9 million¹³ for the promotion of the European Union's agri-food products both in Europe and worldwide. The focus is on promoting products and farming methods that support more directly the European Green Deal objectives, prioritizing organic products, fruit and vegetables, and sustainable agriculture. As part of the F2F Strategy, the European

⁹ At an exchange rate of 1 Euro = 1.17053 (September 28, 2021) this converts to roughly 403 billion U.S. dollar (USD)

¹⁰ Approximately 290 million USD

¹¹ Approximately 175 million USD

¹² Approximately 117 million USD

¹³ Approximately 214 million USD

Commission announced in April 2021, that it would review the European Union's policy on the promotion of agricultural products both inside and outside the Union. This review fits in the Commission's Green Deal efforts to promote more sustainable production and consumption of food. For more information about the EU's promotion program please see GAIN Reports [EU 2021 Promotion Programs for Agricultural Products](#) and [Review of the EU Policy on the Promotion of Agricultural Products](#).

Certification of Fruit Shipments

Fruit and vegetables exported to the EU require a phytosanitary certificate. A USDA/Animal Plant Health Inspection Service inspector issues these certificates. This standard-setting body coordinates cooperation between nations to control plant and plant product pests and to prevent their spread.

[Regulation 2016/2031](#) concerning protective measures against pests of plants became applicable on December 14, 2019, and contains provisions concerning compulsory plant health checks. Commission Implementing [Regulation \(EU\) 2019/2072](#) includes documentary, identity, and physical plant health checks to verify compliance with EU import requirements and uniform conditions. There is more information available on the DG SANTE website:

http://ec.europa.eu/food/plant/plant_health_biosecurity/non_eu_trade/index_en.htm

The Commission monitors imports of fruit and vegetables on an annual basis to determine how to adjust the frequency of testing consignments. When justified, it can reduce the frequency of plant health checks. The latest updated list of products with a reduced plant health checks is available at the following link: https://ec.europa.eu/food/plants/plant-health-and-biosecurity/trade-plants-plant-products-non-eu-countries/reduced-frequency_en.

Maximum Residue Levels for Fruit

Maximum Residue Levels (MRLs) for pesticides, including import tolerances, have been harmonized throughout the EU and can be found in the [EU MRL database](#). The following tables provide interested stakeholders with advance notice of active ingredients under review for renewal of approval in the EU and are listed with a U.S. MRL for fresh deciduous fruit in the [global MRL database](#). For additional information, please consult the FAS/Brussels' website on [EU Early Alerts](#).

*Upcoming reviews for MRLs:**1. Article 12 review*

<https://www.efsa.europa.eu/sites/default/files/pesticides-MRL-review-progress-report.pdf>

Upcoming reviews for active substances:

Active Substance	Expiry date	Last day to submit application for renewal of the active substance:
Emamectin	11/30/2024	11/30/2021
Chlorantraniliprole	12/31/2024	12/31/2021
Amisulbrom	09/30/2024	09/30/2021
Ascorbic acid	09/30/2024	09/30/2021
S-Abscisic acid	09/30/2024	09/30/2021
Spinetoram	09/30/2024	09/30/2021
Thiencarbazon	09/30/2024	09/30/2021
Valifenalate(formerly Valiphenal)	09/30/2024	09/30/2021
Acequinocyl	11/30/2024	11/30/2021
Flubendiamide	11/30/2024	11/30/2021
Ipconazole	11/30/2024	11/30/2021
Pendimethalin	11/30/2024	11/30/2021
Aminopyralid	12/31/2024	12/31/2021
Metaflumizone	12/31/2024	12/31/2021
Metobromuron	12/31/2024	12/31/2021
Imazamox	01/31/2025	01/31/2022

2. Glyphosate

The active substance glyphosate is approved for use at the EU level and is set to expire on December 15, 2022. Its renewal procedure is currently ongoing, and its last reauthorization was limited to five years instead of the more typical 10 to 15 years. Although the substance is still approved at the EU level, some member states are banning its sale or restricting its use as a plant protection product at the national level. This includes Luxembourg, Austria, Germany, France, the Netherlands, and Belgium.

Despite the restrictions, the EU MRLs for glyphosate remain in place in these member states. At the time of this report, impact on trade has been limited as there are no restrictions on imported products that are treated with products containing glyphosate. However, some member states may be under political pressure to restrict imported products containing glyphosate because some EU farmers are not allowed to use the substance.

Tariffs

Entry Price System

EU imports of fresh fruit and vegetables are subject to the Entry Price System, which has been in place in its current form since the Uruguay Round. It is a complex tariff system, which provides a high level of protection to EU producers. In this system, fruits and vegetables imported at or above an established entry price are charged an ad valorem duty only. Tariff levels for 2021 are published in [Commission Implementing Regulation 2020/1577](#). The tariffs can be found on the following pages:

Apples see pages 109 and 814-817

Pears see pages 109 and 817- 820

Concentrated Apple Juice see pages 188-189

Grapes see pages 109 and 813-814

First Come, First Served Principle

Regarding the administration of import tariff quotas, certain types of fresh deciduous fruit are subject to the [‘first come, first served’ principle](#):

Product	Tariff codes	Quantity (kg)	Period	Origin	In-Quota Duty
Apples, fresh	0808 10 80	666,000	April 1 – July 31	All third countries	4%
Pears, fresh	0808 30 90	810,000	August 1 – December 31	All third countries	5%
Table grapes, fresh	0806 10 10 90	885,000	July 21 – October 31	All third countries	31%
Preserved fruit including preserved pears	2008 40 11 2008 40 19 2008 40 21 2008 40 29 2008 40 31 2008 40 39	2,820,000	January 1 – December 31	All third countries	20%

Tariff Rate Quota's Under Free Trade Agreements

On June 28, 2019, the European Union became the first major partner to strike a trade agreement with the Southern Common Market (or MERCOSUR) countries of Argentina, Brazil, Paraguay, and Uruguay. The EU Parliament and Commission still have to ratify the agreement, but it will eliminate 93% of tariffs for MERCOSUR exports to the EU, while offering preferential treatment for the remaining 7%. Although a final tariff schedule has not yet been publicly released, a [preliminary analysis](#) indicates that U.S. agricultural products that compete with MERCOSUR and EU products will be at a significant disadvantage.

Other Free Trade Agreement affecting fresh deciduous fruit exports to the EU

The EU is negotiating and has implemented several Free Trade Agreements (FTAs) with other countries and regions such as the major EU fresh deciduous fruit partners: Chile, South Africa, the UK, New Zealand, and Argentina, which include concessions on food products. Additional information is available on the website of the EC at: <https://ec.europa.eu/trade/policy/countries-and-regions/negotiations-and-agreements/>

Bans Impacting Fresh Deciduous Fruit Trade

Russian Import Ban on Agricultural Products

On August 7, 2014, the Russian government implemented a (then) one-year ban on a range of agricultural and food products, including apples, pears, and grapes, from the United States, the EU, Canada, Australia, and Norway, in response to U.S. and EU sanctions over Russian actions in Ukraine. Russia has since continued to extend the ban every year. The Commission introduced specific market support measures for the European fruit and vegetable sector since the start of the ban in 2014 through 2017. The last emergency measures for fruit and vegetables were phased out on June 30, 2018. Overall, the EU granted \$585 million (€500 million) of aid to EU producers of fruit and vegetables corresponding to 1.7 MMT of withdrawals from the market. Please find more information on the Commission's response to the Russian ban here: http://ec.europa.eu/agriculture/russian-import-ban/index_en.htm

Brexit

The United Kingdom withdrew from the European Union on February 1, 2020. The Agreement on the withdrawal of the UK from the EU entered into force on the same date. This Agreement provided for a transition period, which ended on December 31, 2020. During the transition period, EU law was applicable to and in the UK. On December 24, 2020, the EU and UK negotiators reached a Trade and Cooperation [Agreement](#) (TCA) that sets out the rules of the new partnership between the EU and UK entered in to force on January 1, 2021. For more information: https://ec.europa.eu/info/relations-united-kingdom/new-normal/consequences-brexit_en

Beginning on January 1, 2021 the provisions of the TCA immediately led to some border disruptions, delays, and stuck shipments, especially on the UK side as EU ports and customs immediately enforced the new customs documents requirements according to EU guidelines, while the UK implemented a phased grace period through July 1, 2021, which was subsequently extended until July 1, 2022. Some of these problems reflect the speed with which traders had to familiarize themselves with the new arrangements, while others are more structural in nature and will mean long term change, such as the amount of paperwork required for groupage shipping or the availability of export health certification for certain products.

The European Commission published a notice to stakeholders on the withdrawal of the United Kingdom and EU food law, as well as for [import licenses](#) on the EU Tariff Rate Quotas (TRQ).

Trade Fairs

Trade fairs play a key role in presenting new products to the trade or in finding additional buyers and importers. The most important trade shows related to the fruit and vegetable sectors are listed below. At the time of writing these trade shows are still scheduled to happen as in person events. However, depending on the further development of the COVID-19 pandemic, they may be converted and held fully or partially online instead. Biofach 2022 already offers a virtual participation option.

<p>FRUIT LOGISTICA Berlin, Germany (Interval: yearly)</p> <p>Target Market: Germany/EU/Central & Eastern Europe The leading European trade show for fresh and dried fruit, nuts, and related products. In the past, more than 2,400 companies from across the entire fresh produce value chain participated, including major global players as well as small and medium-sized suppliers from around the world. https://www.fruitlogistica.de/en/</p>	<p>Next Fair:</p> <p>February 9-11, 2022</p> <p>In-person event</p>
<p>BIOFACH Nuremberg, Germany (Interval: yearly) Target Market: Germany/Europe The leading European trade show for organic food and non-food products http://www.biofach.de/en</p>	<p>Next Fair:</p> <p>February 15-18, 2022 (hybrid concept also allows virtual participation)</p>

Related Reports

Country	Title	Date
Spain	Spanish Fresh Deciduous Fruit Committed to Sustainability and Smart Farming	10/01/2021
EU	EU Stone Fruit Annual	09/03/2021
Portugal	Portuguese Fruit Sector Aims to Increase Investments Efficiency and Exports	06/29/2021
EU	EU Citrus Semi-Annual	06/14/2021
Bulgaria	Fresh Deciduous Fruit Annual	11/19/2020
EU	Fresh Deciduous Fruit Annual	11/03/2020
Germany	Germany Announces Follow-Up Rule for Seasonal Workers	06/12/2020
Czech Republic	COVID-19, Czech Government Announced a Plan for Relaxing of Restrictive Measures	04/22/2020
Romania	Preliminary Assessment of COVID 19 on Romanian Food and Agriculture	04/06/2020
Germany	Product Brief Fresh Fruits	02/15/2019
Portugal	Portugal Strengthens Cooperation with China and Secures new Access	02/13/2019
Spain	Spain Gets Green Light to Ship Fresh Pork and Table Grapes to China	01/25/2019
EU	EU Renews Glyphosate for Five Years	01/23/2018

These and other GAIN reports can be downloaded from the USDA/FAS GAIN database:

<https://gain.fas.usda.gov/#/search>

Attachments:

No Attachments