Required Report: Required - Public Distribution **Date:** November 01, 2023

Report Number: E42023-0045

Report Name: Fresh Deciduous Fruit Annual

Country: European Union

Post: Berlin

Report Category: Fresh Deciduous Fruit

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Report Highlights:

EU commercial apple production in Marketing Year (MY) 2023/24 is forecast at 11.5 MMT, a decrease of 2.45% compared to the previous year. EU commercial pear production is expected to amount to 1.7 MMT; 12% lower than in the previous year. EU commercial table grape production is forecast down 16% from the previous season at 1.29 MMT.

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). Unless stated otherwise, 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**.

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Abbreviations and terms not otherwise defined in the report:

EU	European Union – 27 EU member states: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, and Sweden.
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
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

Note: For clarity variety names, chemical substances, and the Latin names of fungal diseases are displayed in *italics* in the text.

Contents

Executive Summary

Apples

Commercial apple production in Marketing Year (MY) 2023/24 (July/June) is forecast at 11,554,650 metric tons (MT) a drop of 2.5% compared to the previous year. The reduction is largely a combination of poor pollination, higher than normal physiological fruit fall in June, and drought and/or high temperatures affecting large parts of the EU at different times of the year. Quality is expected to be good, as hail damage remained localized in Italy and Slovenia. Market prospects are good. Beginning stocks were very low for both fresh apples and concentrated apple juice. The latter is important as the processing sector absorbs significant amounts of low-quality apples. With high inflation consumption of fruit is under pressure as consumers have less disposable income. At the same time, within the fruit category apples are less affected as they are still comparatively cheaper than some other fruits. Since 2014, U.S. apple exports to the EU are low due to technical issues linked to using morpholine as an additive in waxes, and diphenylamine (DPA) – a post-harvest treatment for storage scald. The EU is a competitor for U.S. apple exports in markets like Saudi Arabia, the United Arab Emirates (UAE), and India.

Pears

MY 2023/24 (July/June) EU commercial pear production is expected to amount to 1,747,521 MT MMT; 12% lower than in the previous year. Record low production in Italy, due to frost, floods, heatwaves, and hailstorms, are the dominant reason behind the EU's low harvest. Commercial production is also expected to be somewhat lower in France and Portugal, while Belgium and Spain are expecting a larger pear harvest. Belgium, the Netherlands, Spain, Italy, France, and Portugal together account for 84% of EU pear production. The taste, color, and size of the harvested pears are expected to be good. Compared to MY 2022/23, EU pear imports are expected to increase in MY 2023/24 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 non-existent.

Table Grapes

In MY 2023/24 (June/May), EU table grape commercial production is forecast down 16% from the previous season at 1,292,300 MT. This is mostly due to lower volumes in Italy, resulting from heavy rains during pollination in May and June. Production decreases are also forecast in Greece, France, and Bulgaria. Conversely, higher volumes are forecast in Spain and Romania. Overall, fruit quality is forecast to be excellent with higher sugar content due to hot temperatures in July. EU table grape imports from the United States are rare. EU table grape exports to the United States are marginal.

Impact of Russia's Invasion in Ukraine

More than a year after Russia invaded Ukraine its direct and indirect effects still have a major impact on EU markets for fresh deciduous fruit. Direct effects include the lack of seasonal workers from Ukraine. Indirect effects are even more important and include increased production costs, due to increased prices for inputs such as plant protection products, fuel, and fertilizers. Electricity prices increased, which

translated into considerably higher storage costs. Additionally, the price-surge of all commodities affected consumption in the EU as well as demand in important export destinations. Furthermore, countries in Northern Africa that imported much of their cereal grains from Ukraine would rather use precious international currency to import wheat and corn than fruit. Higher transportation costs and reduced availability of containers added to the negative effects on trade. Against this backdrop, effects on direct trade of deciduous fruit between Ukraine and the EU are of less importance.

Impact of high inflation

Inflation hits farmers hard as they have to pay more for their inputs (fertilizer, plant protection, irrigation, energy, labor, packaging) and logistics, without being able to pass down the costs along the supply chain.

With high inflation and lower disposable income consumers often spend less on fruit. At the same time, within the fruit category apples, pears, and table grapes are less affected as they are still comparatively cheaper than berries or more exotic fruits like papaya, persimmons, or mangoes.

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 initially resulted in some border disruption, delays, and stuck shipments that were subsequently resolved. However, the UK implemented a phased-in grace period through July 1, 2021, which was subsequently extended multiple times and is now set to end on January 31, 2024. Border disruptions for EU exports to the UK could occur once this grace-period ends and the UK requires phytosanitary certification and physical checks. For more details, please see policy section.

Section I: Apples

Table 1: Production, Supply, and Distribution – Apples

Apples, Fresh	2021/2022		2022/2023		2023/2024	
Market Year Begins	Jul 2021		Jul 2022		Jul 2023	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	496,620	492,520	486,000	481,250	0	477,200
Area Harvested (HA)	486,450	469,338	478,700	454,695	0	450,000
Commercial Production (MT)	11,550,360	11,572,772	11,880,870	11,844,930	0	11,554,650
Non-Comm. Production (MT)	727,000	693,000	891,000	838,390	0	653,400
Production (MT)	12,277,360	12,265,772	12,771,870	12,683,320	0	12,208,050
Imports (MT)	331,400	331,283	290,000	242,601	0	250,000
Total Supply (MT)	12,608,760	12,597,055	13,061,870	12,925,921	0	12,458,050
Domestic Consumption (MT)	11,459,960	11,448,237	12,011,870	11,859,671	0	11,363,050
Exports (MT)	1,148,800	1,148,818	1,050,000	1,066,250	0	1,095,000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	12,608,760	12,597,055	13,061,870	12,925,921	0	12,458,050
(HA), (MT)						

Not official USDA data. Sources: Area planted for MY 2021/22 and 2022/23: Eurostat; trade for MY 2021/22 and 2022/23: Trade Data Monitoring, LLC (TDM) accessed on September 27, 2023; All other: FAS EU posts

Apples - Commercial Production[1]

The EU is one of the leading producers and consumers of apples in the world. Commercial apple production exists in all member states (MS), except for Malta. However, production in Cyprus, Estonia, and Luxemburg is marginal and not covered in this report. The top five producing member states (Poland, Italy, France, Germany, and Spain) together account for 80% of the EU's total commercial apple production.

Area

EU harvested apple area showed a small decline of 1% in MY 2023/24. Mostly a result of reductions in Hungary, Czech Republic, and Poland. Smaller reductions were recorded in the Netherlands, Portugal, Germany, Bulgaria, and the Slovak Republic. Only in Italy and France area increased.

- In Hungary, the harvested area of apple orchards has steadily decreased over the last 20-25 years, from 42,000 ha at the turn of the millennium to 20,500 ha today. Additionally, production levels remained relatively low because more than two thirds of orchards do not have irrigation and/or

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

intensive growing systems. High quality apples can only be produced in intensive, irrigated, and frost- and hail-protected orchards, but the area of these modern plantations is not more than 2,000-2,500 ha in Hungary. This reality affects the country's production potential and is a vulnerability for the future of the sector, as apple production is quite exposed to adverse weather conditions.

- Last year, Czech fruit growers cut down 11 percent of their apple orchard area due to low purchasing prices and loss-making cultivation. Fruit trees are being replaced by more profitable crops, such as cereals or rapeseed.
- In Poland, some apple growers have abandoned production in favor of other fruits, mainly cherries.
- In the Netherlands and Belgium, the reduction is a reaction to reduced exports and disappointing profit margins in the past decade. Former export markets have become more self-sufficient and additionally, Dutch apple exports face stronger competition from Central and Eastern European countries on the market. As a result, some orchards that have reached the end of their production cycle are not being replanted.

Production

Commercial apple production in MY 2023/24 is forecast to decrease by 2.45% compared to the previous year. In absolute terms the decreases are highest in Poland, Germany, Austria, and Belgium with roughly 400,000 MT, 182,000 MT, 46,000 MT and 37,000 MT projected lower production, respectively. While production is forecast to increase in Hungary, France, and Spain and to a lower extent in Romania and Croatia, the combined increase is not sufficient to compensate for the reduction elsewhere.

While growing conditions differed between the regions, poor pollination resulting from cold weather during the flowering stage and higher than normal physiological fruit fall in June are common themes. Additionally, drought and /or high temperatures affected large parts of the EU at different times of the year. Portugal and Spain experienced a severe drought in spring and a heat wave in August that also affected Italy and Greece, while the northern and north-eastern EU suffered from lack of rain in June/July followed by excess rains in July and August. Quality is expected to be good, as hail damage remained localized in Italy and Slovenia. Poland reported a higher incidence of fungal diseases, but these quantities can easily be absorbed by the processing industry.

Electricity prices are somewhat lower than in the previous marketing year but still much higher than in the years prior to Russia's invasion in Ukraine. This drives up costs for cold storage which may prompt producers to divert a higher share of lower value fruit (e.g., smaller or over-sized fruit, fruit with little color, less popular varieties) into processing than usual.

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 2021 (latest available data), the five member states with the largest organic apple acreage were France, Germany, Italy, Poland, and Hungary, together accounting for 78% of organic apple area.

At Prognosfruit[2], EU organic production was forecast to decrease to 683,000 MT compared to 722,000 MT in 2022, taking the share of organic at total EU apple production to six percent (2022: 6.14 percent). This is well below the 25 percent goal that the EU has set itself for 2030, making it highly unlikely that this goal will be achieved. Industry reports that consumer demand for organic products has suffered even more from economic pressure than for conventional food. It is concerned that at the projected pace of the increase in EU organic apple production could soon outpace the growth in consumption.

Table 2: EU-27 Commercial Apple Production by Country and Year in MT

COUNTRY	2021/22	2022/23	2023/24 e	Change 2023:2022	Share of Total Production in 2023
Poland	4,067,400	4,400,000	**4,000,000**	-9%	35%
Italy	2,052,779	2,112,975	**2,104,125**	0%	18%
France	1,300,400	1,446,000	**1,614,000**	12%	14%
Germany	1,004,625	1,070,978	**889,000**	-17%	8%
Spain	563,441	411,977	**536,023**	30%	5%
Hungary	478,000	288,420	**515,000**	79%	4%
Romania	440,000	410,000	**425,000**	4%	4%
Greece	272,065	310,000	**290,000**	-6%	3%
Portugal	368,000	295,000	**265,500**	-10%	2%
Netherlands	243,000	235,000	**207,000**	-12%	2%
Belgium	245,000	234,000	**197,000**	-16%	2%
Austria	152,171	190,588	**145,000**	-24%	1%
Czech Republic	114,958	131,353	**102,652**	-22%	1%
Croatia	59,687	46,820	**55,000**	17%	0.5%
Bulgaria	40,930	43,403	**42,000**	-3%	0.4%
Slovenia	23,011	48,838	**35,000**	-28%	0.3%
Lithuania	35,000	48,000	**35,000**	-27%	0.3%
Slovak Republic	29,585	31,068	**26,840**	-14%	0.2%
Sweden	27,000	30,000	**24,000**	-20%	0.2%
Ireland	19,830	19,500	**19,500**	0%	0.2%
Denmark	18,000	24,000	**15,000**	-38%	0.1%
Finland	7,890	7,010	**7,010**	0%	0.1%

[2] Prognosfruit is the European annual apple and pear production forecast conference usually happening in the first week of August. For more information please visit: www.prognosfruit.eu/

Latvia	10,000	10,000	**5,000**	-50%	0.04%
Total	**11,572,772**	**11,844,930**	**11,554,650**	**-2.45%**	

e= estimated; Note: The table is grouped by ranking in MY 2022/23. Due to rounding percentages add up to marginally more than 100%. Source: FAS EU posts

Member State Specific Production Information

- In Poland, in projected lower production is a result of a combination of poor pollination, higher physiological fruit fall and higher pressure of pests and fungal diseases. Low temperatures and frequent rainfall made it difficult to carry out plant protection measures in spring, leading to the development of fungal diseases. Pressure from plant pests also intensified. Apple quality in MY2023/24 varies greatly, depending on region and producer. It is expected that the poorer quality apples will be diverted to processing and there will be significantly fewer good-quality apples left at the end of the season than in the previous year. There are many regions in Poland where the weather did not allow for effective treatments against the scab fungus. Many fruit growers abandoned plant protection and fertilization due to costs.
- Italian production is forecast to remain stable compared to MY 2022/23, however, there are changes between the production regions. Volume decreases in the Veneto region (-25 percent) due to spring frosts are counterbalanced by increased quantities in Alto Adige (+7 percent) and Trentino (+4 percent). Quality is expected to be excellent. Producers are challenged by increased production costs, the geopolitical instability, and reduced household consumption as the pressure on consumer budgets is increasing.
- In Germany, the reduction is a result of spring frosts and alternate bearing. Fruit quality is expected to be excellent and sufficient sunshine and temperature differences between day and night resulted in good coloring. In addition to the general increase in production costs, German farmers faced increased labor costs resulting from an increase in the minimum wage. From January 1, 2021, to October 1, 2022, the minimum wage (which also applies to seasonal labor) increased in five installments from 9.50 euro to 12.00 euro per hour. The next increase 12.41 euro will occur on January 1, 2024.
- After the setback of the 2022 production (due to the extreme drought conditions), Hungary expects a rebound in production in 2023. The weather has been nearly optimal since May, with abundant rainfall and only short periods of heat waves associated with heat and radiation stress. At the same time, storm and hail damage can be above average as severe hailstorms hit the major apple growing regions. However, it causes mostly qualitative rather than quantitative damage. Thanks to the benign weather, fruit sizes developed favorably even in non-irrigated orchards.
- The forecast 3% increase for Romania's apple production is due to better weather conditions in the western regions of the country. Fruit size and quality is expected to be good. Late frost and hail have only sporadically affected the orchards. Apart from general cost increases, growers are affected by a labor shortage. This will likely force farmers to speed up investment in mechanized fruit picking.

- On September 5, Central Greece was among the hardest hit by the storm 'Daniel' with record amounts of rainfall in the Thessaly region. The apple-producing area of Mount Pelion (Zagora) received the highest levels of rainfall, as it registered 754 millimetres, and significantly reduced apple yields. Nonetheless, fruit quality is expected to be good.
- The decrease in Dutch apple production is a combination of reduced area and lower yields, the latter resulting from poor growing conditions at the beginning of the season amplified by increasing infestation with the apple blossom weevil, a small beetle about 6 millimeters long. In the spring, these beetles infest apple trees. The beetle's reproductive process involves pricking the blossom and laying eggs in some of the flowers. From these eggs, larvae emerge, preventing the flowers from maturing into apples. Some orchards contain trees that are completely empty and the apples, left on the tree, are often completely deformed.

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, Red Jonaprince)* 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 Belgium and Germany. However, *Jonagold's* dominance in Belgium is waning and for the first time in decades its acreage share in Belgium will be below 50%. In contrast, *Gala* is now the second most produced apple in the EU and is grown in numerous MS rather than dominating in a few. *Idared*, which was one of the top varieties in Eastern Europe prior to the 2014 Russian import ban[3] is still the number one variety in Hungary but dropped to number two in Poland and Romania and is expected to further decline in the future.

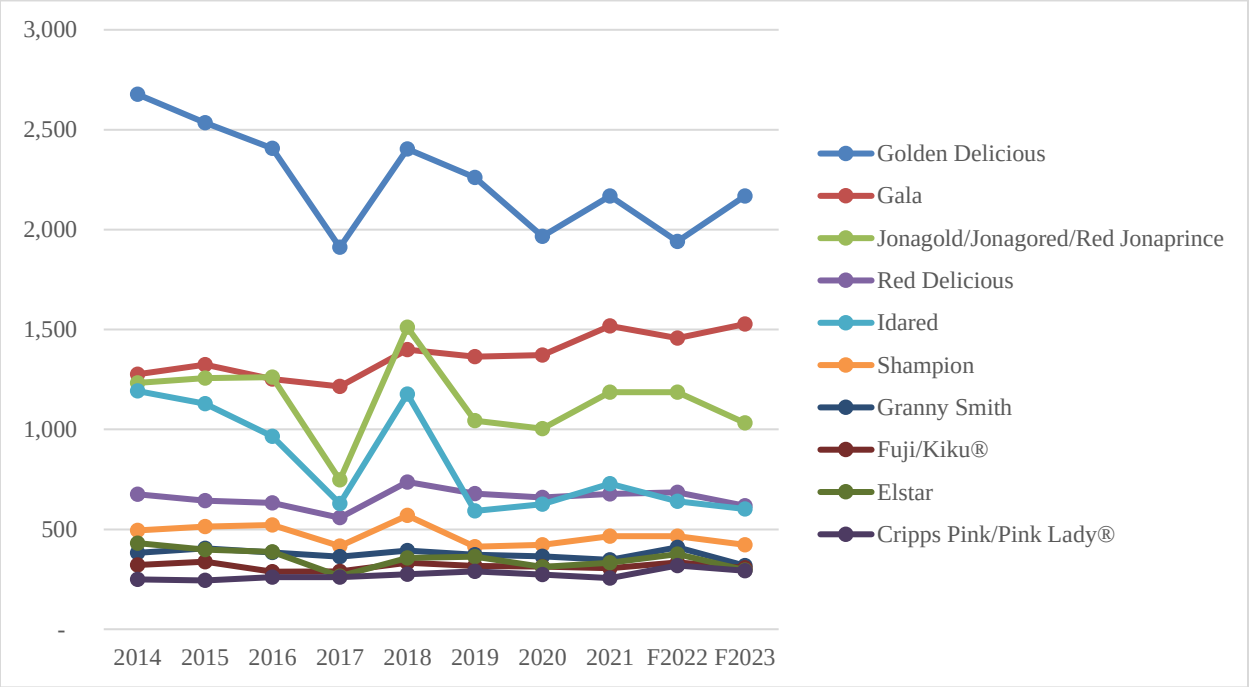
New varieties, for example *Pink Lady®, Kanzi®, Rubens®, Tentation®, Wellant*, *Cameo*, and *Kiku®*, have increased their share of production in recent years. Among these, trademark protected "Club[4]" varieties are gaining traction. Denmark, the Netherlands, and France have the highest share of "new" varieties in their production portfolio with 33%, 14%, and 14% of these varieties making up 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 the growing organic production sector. 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, and Golden Delicious. This is contributing to the replacement of Idared, which used to be the dominant variety grown in Poland before Russia imposed an import ban on the EU in 2014.

[3] See policy section
[4] 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.

Chart 1: EU27 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 MY 2023/24 is estimated to decrease by 22% compared to the MY 2022/23 harvest. This is mostly due to a lower projected production in Germany, Austria, and Slovenia that cannot be compensated by a rebound in Hungary, and to a lesser extent in Romania and Belgium. 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 in the PSD table at the beginning of the apples' section is a rough estimate based on industry rather than official information. In MY 2023/24, non-commercial production represents about 5.4% of total apple production, compared to 6.6% 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.

Apples – Stocks

According to the World Apple and Pear Association, EU-27 apple stocks amounted to 338,421 MT on July 1, 2023, compared to 531,282 MT at the same time in 2022. This is the lowest level in the past five years and the second lowest in the past 10 years and combined with the smaller harvest bodes well for higher apples prices in MY 2023/24.

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 the prices for the new harvest. In this report, stocks are included in the "fresh domestic consumption" line in the PSD.

Apples – Consumption

Apples are the most popular fruit in all member states except for Spain, where oranges are number one. However, per capita consumption of apples has been decreasing in recent years as consumers eat more soft fruit instead (for example in Germany) or stone fruit (for example in Spain). With high inflation consumption of fruit is under additional pressure as consumers have to spend a higher share of their income on energy and have less disposable income for food. At the same time, within the fruit category apples are less affected as they are still comparatively cheaper than berries or more exotic fruits like papaya, persimmons, or mangos.

Apples - Processing

In MY 2023/24, processing use of apples is expected to decrease by 8.9% compared to MY 2022/23, amounting to roughly 4.2 MMT. However, this masks opposite developments in some MS. Volumes going into processing are expected to decrease in Poland, Germany, Austria, Slovenia, Lithuania, Portugal, Belgium, and Bulgaria as a result of the lower commercial and non-commercial production. In contrast, volumes going into processing are projected higher in Hungary and to a lesser extent in Italy, France, Czech Republic, and Latvia, and to remain stable in Romania, the Netherlands, and Slovakia.

That said, the processing sector is expected to absorb a significant share of lower quality table apples as the comparatively high prices for processing apples combined with high energy prices make it more attractive to divert lower quality apples to this use rather than putting them into costly storage.

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 state, ranging from none in the Scandinavian countries to over 60% in Poland.

Apples – Trade

The majority of apple trade occurs among the EU member states. Over the past five years, on average about 1.9 million MT of apples were traded between EU member states, while roughly 320,000 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

EU-27 apple exports to the UK fluctuated between 170,000 to 195,000 MT in the past five years. The main EU apple exporters to the UK included France, Italy, Poland, Spain, Belgium, Germany, and the Netherlands. The UK is a particularly important destination for French and Spanish apple exports, as it is the number one and number three export destination for these two countries, respectively. UK exports to the EU-27 were much lower, between 7,800 and 53,000 MT, in recent years, with the vast majority going to Ireland. Trade flows exhibited change from January 1, 2021, when the UK departed the EU single market and customs union. An increase of apple imports into Ireland occurred from other member states, particularly France, Poland, and Belgium, to avoid the need for Brexit-related paperwork now required when shipping to Ireland via the UK.

Apples - Imports

For MY 2023/24, EU-27 imports are expected to increase by 3%. The largest increase in volume is expected in Germany, Ireland, Denmark, Sweden, Italy, and Bulgaria; while Latvia, Denmark, and Lithuania expect the highest volume increase in percent. In contrast, France, Austria, Romania, Hungary, Croatia, and Poland expect lower imports than in MY 2022/23.

In MY 2022/23, about 65% 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. The Netherlands was by far the largest importer of apples, accounting for 28% of EU-27 imports. However, much of the volume entering the Netherlands is not consumed there but is eventually transshipped to other member states. Other important importing countries included Bulgaria, France, Germany, Ireland, Romania, Sweden, and Belgium.

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 maximum residue level (MRL) for DPA was lowered in March 2014 only exporters with designated DPA-free facilities are eligible 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. In previous marketing years, the Netherlands, Spain, and Italy also imported apples from the United States, albeit in negligible amounts.

Table 4: EU27 Imports of Apples in MT

Country of Origin	MY 2020/21	MY 2021/22	MY 2022/23	Change MY 2022/23 To MY 2021/22	Share of Total Imports in MY 2022/23
Chile	102,179	116,821	**70,002**	-40%	29%
New Zealand	54,411	53,224	**40,801**	-23%	17%
South Africa	37,001	40,652	**36,096**	-11%	15%
North Macedonia	40,174	51,730	**30,194**	-42%	12%
United Kingdom	28,600	7,823	**22,099**	182%	9%
Moldova	760	8,997	**12,603**	40%	5%
Serbia	22,838	16,108	**9,458**	-41%	4%
Brazil	13,188	7,539	**6,492**	-14%	3%
Argentina	11,982	8,814	**4,629**	-47%	2%
Ukraine	3,692	6,945	**3,995**	-42%	2%
United States	**0**	**18**	**0**	-100%	0%
Other	10,095	12,612	**6,232**	-51%	3%
World total	**324,920**	**331,283**	**242,601**	**-27%**	

Note: The table is grouped by ranking in MY 2021/22. Due to rounding percentages may add up to marginally less or more than 100%. Source: TDM, LLC accessed on September 13, 2022

Apples - Exports

In MY 2023/24, EU apple exports are forecast to increase by about 30,000 MT (translating into an increase of 2.7%) as a result of the higher projected exports from Poland, France, Spain, and to a smaller extent from Lithuania, Hungary, and Romania. Exports are projected to remain stable for Slovenia and Bulgaria and decrease for all remaining member states. EU exporters hope to benefit from the lower production in India and expect to export more to this destination.

In MY 2022/23, Italy, Poland, Greece, France, and Spain, were the top five apple exporters amongst EU member states for destinations outside of the EU, they accounted for 39%, 36%, 6%, 6%, and 4% of total EU apples exports, respectively. Exports to Egypt were significantly reduced as the Egyptian government put restrictions on the export of foreign currency. Italy and Portugal were able to double and triple exports to Brazil. Exports to Belarus dropped again as a result of Belarussian import bans against apples from certain EU member states.

In response to the 2014 Russian import ban, EU exporters looked at increasing exports to other destinations (Eastern Europe, Northern Africa, the Middle East, and Brazil) with varying success. The most successful countries had 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 now exporting to India. In Poland, there is particular hope amongst producers that exports to India can partially replace the lost Russian market. 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. Poland has concluded agreements with Vietnam and several other Asian countries. Additionally, Poland gained access to South American countries such as Colombia, Costa Rica, French Guiana, and Panama.

Table 5: EU-27 Exports of Apples in MT

Country of Destination	MY 2020/21	MY 2021/22	MY 2022/23	Change MY 2022/23 To MY 2021/22	Share of Total Imports in MY 2022/23
United Kingdom	189,949	195,335	**169,365**	-13%	16%
Egypt	264,932	302,203	**162,778**	-46%	16%
Saudi Arabia	63,897	82,075	**85,002**	4%	8%
India	54,322	90,765	**81,432**	-10%	8%
Brazil	27,011	9,237	**59,468**	544%	6%
Kazakhstan	49,390	58,919	**58,497**	-1%	6%
United Arab Emirates	27,876	35,446	**40,367**	14%	4%
Belarus	117,715	63,993	**39,023**	-39%	4%
Norway	36,537	31,500	**33,641**	7%	3%
Israel	25,572	31,239	**27,330**	-13%	3%
Jordan	37,321	27,005	**22,604**	-16%	2%
Colombia	13,859	16,318	**20,793**	27%	2%
Mongolia	7,554	15,511	**17,579**	13%	2%
Bosnia and Herzegovina	11,280	12,106	**15,470**	28%	1.5%
Switzerland	16,625	16,230	**14,933**	-8%	1.4%
Ecuador	7,719	7,644	**10,772**	41%	1.0%
Libya	8,131	10,671	**10,429**	-2%	1.0%
Vietnam	5,434	5,783	**10,217**	77%	1.0%
Albania	7,790	7,484	**10,008**	34%	1.0%
Qatar	7,367	8,379	**9,674**	15%	0.9%
Guatemala	3,136	7,170	**9,357**	31%	0.9%
Morocco	7,211	6,771	**8,905**	32%	0.9%
Mauritania	6,204	7,326	**7,945**	8%	0.8%
Kyrgyzstan	0	605	**7,308**	1108%	0.7%
Serbia	8,883	6,315	**6,053**	-4%	0.6%
United States	101	72	**111**	54%	0%
Other	216,496	159,049	**159,441**	2%	9%
World total	**1,084,069**	**1,148,818**	**1,033,250**	**-10%**	

Note: The table is grouped by ranking in MY 2022/23. Due to rounding percentages may add up to marginally less or more than 100 percent. Source: TDM, LLC accessed on September 27, 2023

The five largest EU exporters, together account for 91% of EU apple exports in MY 2022/23. These were Italy (to India, Egypt, The UK, Brazil, Norway, Israel, the U.A.E.), Poland (mostly to Egypt, Kazakhstan, Belarus, India, the UK, and Mongolia), Greece (mainly to Egypt, Jordan, Albania, Saudi

Arabia, and Israel), France (mainly to the UK, Vietnam, UAE, Colombia, and Thailand), and Spain (mostly to the UK, Morocco, Mauritania, Brazil, and Colombia).

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

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

Apples – Prices

Producer prices for apples are expected to be better than in the previous season as they benefit from the decrease in EU production, empty stocks, and good demand from the processing sector which absorbs lower quality apples thus reducing the need for aggressive price promotions. Production costs remain high due to high prices for input costs such as fertilizer, plant protection, energy, packaging, and labor.

Apples – Additional Information

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

Section II: Pears, Fresh

Table 6: Production, Supply, and Distribution – Pears

Pears, Fresh	2021/2022		2022/2023		2023/2024	
Market Year Begins	Jul 2021		Jul 2022		Jul 2023	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	111,352	109,851	110,460	106,419	0	105,516
Area Harvested (HA)	106,763	105,484	107,027	102,774	0	101,855
Commercial Production (MT)	1,746,473	1,753,775	1,987,960	1,992,137	0	1,747,521
Non-Comm. Production (MT)	96,642	92,780	95,080	89,178	0	84,550
Production (MT)	1,843,115	1,846,555	2,083,040	2,081,315	0	1,832,071
Imports (MT)	186,500	186,188	165,000	140,347	0	170,000
Total Supply (MT)	2,029,615	2,032,743	2,248,040	2,221,662	0	2,002,071
Domestic Consumption (MT)	1,680,815	1,683,916	1,888,040	1,875,266	0	1,677,071
Exports (MT)	348,800	348,827	360,000	346,396	0	325,000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	2,029,615	2,032,743	2,248,040	2,221,662	0	2,002,071
(HA), (MT)						

Not official USDA data. Sources: Trade for MY 2021/22 and 2022/23: Trade Data Monitoring, LLC (TDM) accessed in September 2023; All other: FAS EU posts

Pears – Production

Pears – Commercial Production

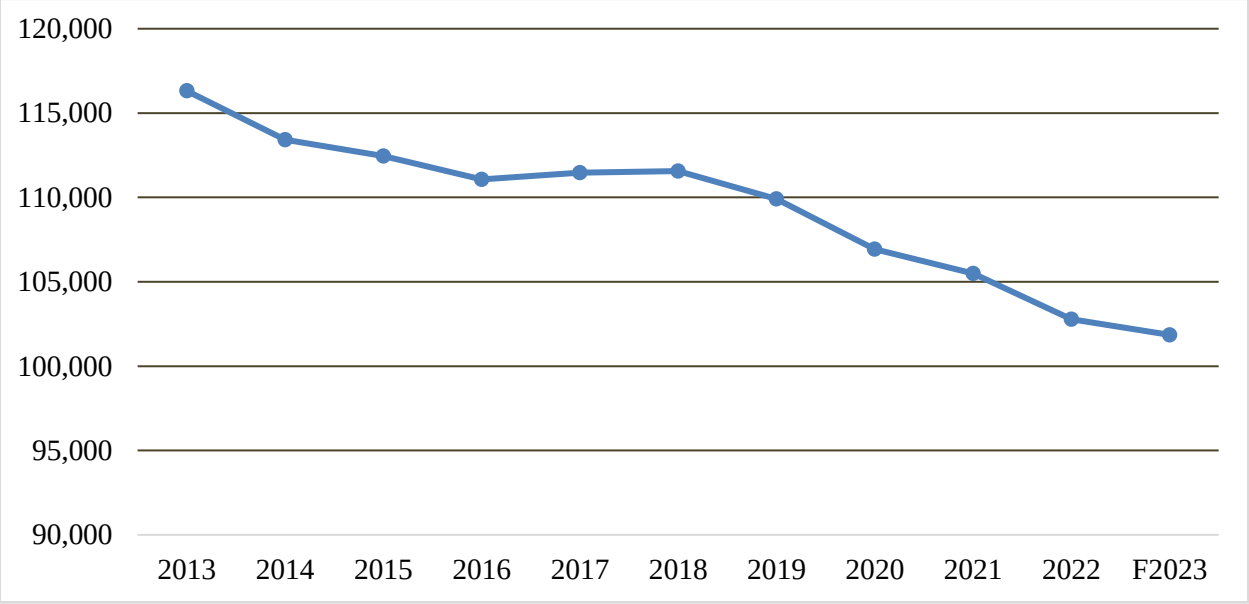
Belgium, the Netherlands, Spain, Italy, France, and Portugal lead pear production in the EU and combined, represent 84% of total EU commercial production in MY 2023/24. EU commercial pear production is forecast at 1,747,521 MT, a decrease of 12% (or 244,616 MT) compared to MY 2022/23, and a similar decrease compared to the average of MY 2020/21, MY 2021/22, and MY 2022/23.

Two years ago, commercial production was also low, which then was the result of lower harvest volumes in Italy. This year, the estimated record low commercial production numbers in Italy are again the dominant reason behind's EU's low harvest. Commercial production is also expected to be somewhat lower in France and Portugal while Belgium and Spain are expecting a larger pear harvest.

This year's growing season, started with a drought on the Iberian Peninsula while there were floods in the Northern part of Italy and a surplus of rain in many regions in Central and Eastern Europe, including Poland. Except for Italy, there are no reports of frost during flowering. While it was quite warmer in parts of Spain and Portugal, temperatures were lower in Eastern European countries. During the summer there were record high temperatures, particularly in the Southern part of the Iberian Peninsula and the Northern part of Italy. In September, a week with very high temperatures was recorded in the

Netherlands and Belgium. Due to the climatic conditions, this year's EU pear production is expected to be the smallest crop in the past 25 years. Pear cultivation in Italy, and to a lesser extent Spain and Portugal, is under pressure because of uncertain climatic conditions, associated with droughts, heatwaves, and hailstorms. Pear production in Belgium and the Netherlands do not seem to be affected and *Conference* pears have demonstrated to be a product secure variety which fares well in the Benelux countries' climate.

Chart 2: EU Area Harvested Pear by Year in Ha



Source: FAS EU posts

This year's area harvested remains at just over 100,000 ha. Over the past decade, the total EU area harvested gradually decreased, on average, by about 1,400 ha annually, driven by reduced areas harvested in Italy and to a lesser extent the Iberian Peninsula. This trend is expected to continue as weather related events, especially in Southern European countries, negatively impact pear harvests and no longer seem to be isolated incidents. Pear growers in Southern European countries are confronted with disappointing profitability and there are challenges with respect to business succession. Owners of orchards that are up for replanting are increasingly struggling to decide whether to replant.

Table 7: EU Commercial Pear Production by Country and Year in MT

	MY 2021/22	MY 2022/23	MY 2023/24e	Change 2023:2022	Share of Total EU Production in 2023
Belgium	350,000	336,000	**400,000**	19%	23%
The Netherlands	340,000	352,000	**341,000**	-3%	20%
Spain	309,000	236,000	**296,000**	25%	17%
Italy	202,000	505,000	**187,000**	-63%	11%
France	69,000	143,000	**126,000**	-12%	7%
Portugal	225,000	132,000	**115,000**	-13%	7%
Poland	70,000	95,000	**90,000**	-5%	5%
Greece	76,000	81,000	**80,000**	-1%	5%
Germany	37,000	36,000	**37,000**	3%	2%
Romania	24,000	20,000	**21,000**	-5%	1%
Hungary	19,000	15,000	**20,000**	33%	1%
Other	32,775	41,137	**34,521**	-6%	2%
Total Production	**1,753,775**	**1,992,137**	**1,747,521**	**-12%**	

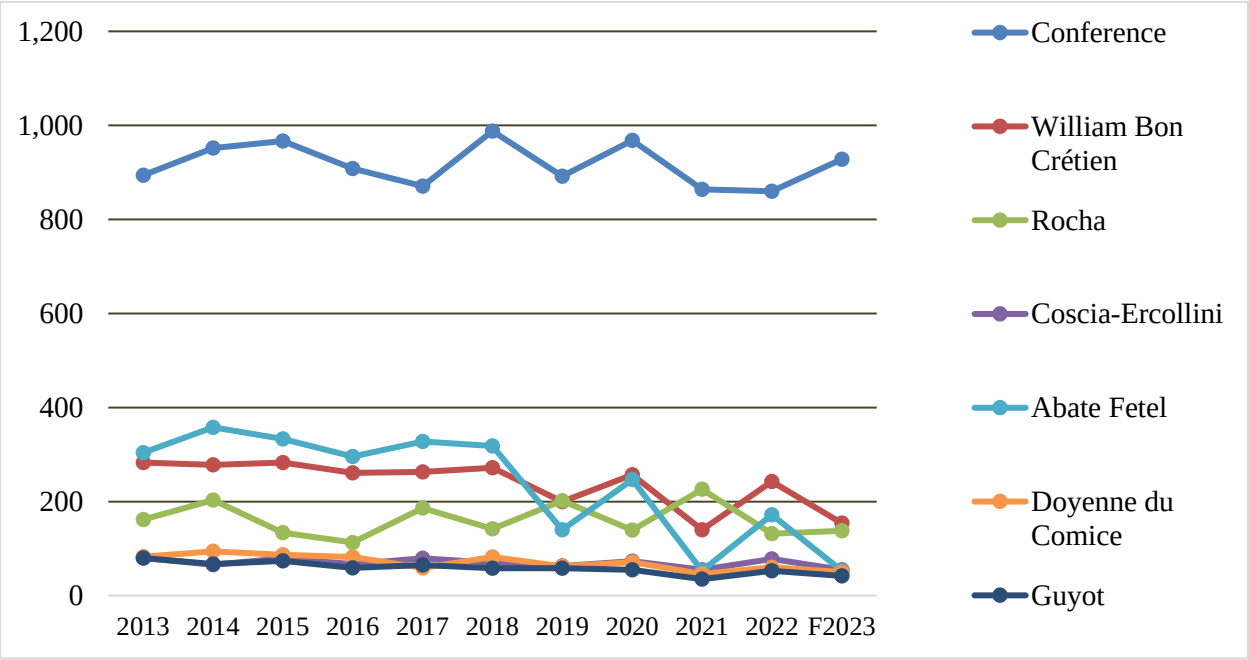
e = estimated; Source: FAS EU posts

- The planted area for pears in both the Netherlands and Belgium grew slowly year-by-year during the past 20-25 years and is currently stabilized at 10,000 and 10,400 ha, respectively. This year, acreage is forecast to slightly decrease to 9,920 ha in the Netherlands. The *Conference* pear variety dominates production in both countries. In Belgium, pear production is concentrated in Flanders and is expected to reach 400,000 MT for the first time ever. The harvested pears are expected to have a bigger size. The Netherlands is expecting another average crop (341,000 MT), a small decrease of 3%. Both countries had an overall favorable growing season, particularly after flowering. There are no reports of damaged fruit due to hail or frost, nor were there any heatwaves or droughts during the growing season. Fruit thinning was hardly needed due to the abundant physiological drop. The taste of this year's harvest is expected to be very good which is the direct result of the sufficient numbers of sunny days this year. *Conference* pears in both countries are also expected to have the unique bronze color that characterizes this variety. It is unclear whether the high temperatures that were recorded during harvesting, will have a negative impact the keeping quality of the harvested pears.
- In Spain, total planted area decreased by 26% over the last 10 years and remained stable at just over 19,000 ha for the past two years, as farmers are replacing their pear orchards with stone fruit orchards. For MY 2023/24, commercial pear production is forecast to rebound to almost 296,000 MT, up by 25%, but still 9% down from the ten-year average. In spring, overall water shortages and the closure of the two main canals led to massive thinning of flowers and fruits and stricter water usages for trees. Unfavorable weather conditions, including strong spring

frosts, hail, and severe winds, that occurred in Spain's largest pear producing region Catalonia, did not impact pear production. This year, fewer pears per tree are expected while the pear size is expected to be bigger. The main pear varieties grown in Spain are *Conference*, *Blanquilla*, *Coscia-Ercollini*, and *Limonera*.

- In Italy, pear production is concentrated in the Northeast. The Emilia-Romagna region continues to be Italy's main pear producing area, accounting for almost three-quarters of Italy's total pear production. *Abate Fetel* is the dominant variety, followed by *William Bon Crétien*, and *Coscia-Ercollini*. Since 2016, Italy's harvested area for pears decreased by almost 1,000 ha per year. This development is expected to continue as fruit growers have been confronted with pear harvests that continue to fluctuate strongly from year to year. This year's significant drop in production by 65 percent compared to MY 2022/23 can mainly be attributed to floods that occurred after some frost and that were followed by several heatwaves. In the second half of July, the Northern part of Italy was confronted with serious hailstorms days with a lot of wind.
- Since 2015, Portugal's harvested area for pears has been steadily decreasing by about 250 ha per year, down to 10,850 ha in 2023. This year's production is expected to drop even further to an estimated 115,000 MT, a direct result of the *Stenfiliosis disease*, which manifested 15 days before harvesting, and to a lesser extent, sunburn. The unique pear variety growing in Portugal is *Rocha*.
- Commercial production of pears in Poland is forecast to total 90,000 MT this year. Industry experts expect production to further increase within the next five years to an estimated 150,000 MT, due to the expanding area of *Conference* pear trees.

Chart 3: EU Pear Production for Selected Varieties in 1000 MT



F = forecast, Source: WAPA data

Over 50% of all pears grown in the EU in MY 2023/24 were *Conference* pears, mainly grown in Belgium, the Netherlands, and Spain. Other popular varieties include *William Bon Crétien/Bartlett* (grown in Italy, Spain, and France) and *Rocha* (grown in Portugal), followed by *Coscia-Ercollini* (grown in Italy and Spain), *Abate Fetel* (grown in Italy), and *Doyenne du Comice* (grown in the Netherlands and France). There continues to be a growing interest, in particular among Dutch and Belgian growers, to start producing club varieties such as *Xenia*, *QTee*, *Migo*, and *Sweet Sensation*. The production of "club[5]" varieties is expected to total 53,000 MT in MY 2023/24, and production is expected to further increase in the coming years.

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, Romania, and the Czech Republic have non-commercial production volumes which account for 50% or more of total pear production in their countries. This year's EU non-commercial volume is similar to last year's non-commercial production number. Austria and Romania alone account for 60% of non-commercial production.

Pears – Consumption

EU pear consumption is under pressure as affluent consumers seem to be slowly moving away from eating more traditional fruit, like pears, and are developing an appetite for more exotic and luxurious fruit like berries, pineapple, mango, and melon. Food distributors are responding to this by offering single serving fruit salads that conveniently can be used at home or on-the-go. For many consumers throughout the EU, increasing costs of living, particularly exacerbated over the last year and a half, are forcing them to make different food choices. Lower priced, often private label, and further processed food, seems to be gaining market share at the expense of healthy and nutritious food options, including fresh fruit. This trend, in combination with this year's small domestic supply, could slightly decrease EU pear consumption in MY 2023/24.

In general, the per-capita consumption of pears fluctuates somewhat from year-to-year depending on local availability and price. The average per-capita consumption of pears in the EU is estimated between three and four kilograms per year with a per capita consumption that varies between member states. High per-capita consumption of pear numbers can be found in countries that have large domestic pear production. The lowest per-capita consumption markets in the EU, at two kilograms per year or less, include Hungary, Slovakia, and Poland.

At the member state level, the most popular pear varieties are often those that are grown regionally. Food retailers offer, on average, one or two different pear varieties. *Conference* pears have gained popularity in the German market (which used to be dominated by *Abate Fetel)* and in the Iberian

[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.

Peninsula especially in times when there is lower availability of locally grown pears. Taste, appearance, texture, convenience, and price are the main consumer considerations when buying pears.

Pears – Processing

Most professional growers primarily produce pears for the fresh consumer market. However, due to their size, shape, skin quality, or overall quality, some harvested pears, are not suitable for the fresh market. 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 on farm level also influence the volume used for processing. In MY 2023/24, processing volumes are estimated at just below 200,000 MT of which roughly a third are pears (mainly *Williams*) produced in Italy, where pears are bought by the local juice industry. Processing volumes in Spain are expected to rebound and are estimated at 29,000 MT. These pears are processed into jelly and used by the canning industry. Austria expects to process 25,000 MT. Most Austrian pears for processing are used to produce Perry (or pear cider), an alcoholic beverage made from fermented pears.

Pears – Trade

EU External Trade

To date Brexit has not impacted EU pear trade as Dutch and Belgian traders are well prepared to deal with the additional paperwork resulting from the UK leaving the EU. This might change when the UK introduces phytosanitary certification obligations and physical checks which was scheduled to start last year but continues to be postponed.

Pears - Imports

Imported pears represent over 6% of total EU pear supply, and traditionally end up in the EU's fresh market. The EU predominantly imports pears from southern hemisphere countries such as South Africa, Chile, and Argentina (see below table). According to TDM, imports from these countries take place year-round but really pick up in February (directly after the harvest in these countries), peak in April, and end in June. Imports for MY 2022/23 followed this pattern. Popular imported varieties include *Packham, Williams/Bon Crétien, Forelle,* and *Abate Fetel*.

The Netherlands and Italy together accounted for almost 70% of the EU's pear imports in MY 2022/23. Most of the volume entering the port of Rotterdam in the Netherlands is shipped to other member states, and in particular Germany. Most of Italy's imports are expected to stay in the Italian market. Other importing member states, albeit on a much smaller scale, are Portugal, Spain, Germany, and Romania.

EU imports were down by 27% in MY 2022/23 compared to MY 2021/22 due to a somewhat higher EU commercial pear production that year. In MY 2023/24, EU pear imports are forecast to be up due to low domestic production. If the keeping quality is good, more EU pears could end up on the fresh consumer market within the EU this year.

Table 8: EU Import of Pears in MT

Country of Origin	MY 2020/21	MY 2021/22	MY 2022/23	Change MY 2022/23 to MY 2021/22	Share of Total Imports in MY 2022/23
South Africa	60,551	75,147	**55,054**	-27%	39%
Chile	44,561	41,784	**34,752**	-17%	25%
Argentina	42,171	37,668	**24,528**	-35%	17%
Türkiye	8,539	16,926	**12,670**	-25%	9%
China	8,523	8,823	**8,286**	-6%	5%
Serbia	2,134	3,371	**3,003**	-11%	2%
Bosnia & Herzegovina	1,250	264	**908**	244%	1%
United Kingdom	1,436	837	**478**	-43%	0%
Uruguay	600	633	**277**	-56%	0%
North Macedonia	36	306	**146**	253%	0%
Other	6,266	1,266	**723**	-43%	1%
Total	**174,631**	**186,188**	**140,347**	**-25%**	

Sources: Trade Data Monitoring (TDM) accessed in September 2022

During the past ten years, Türkiye slowly gained prominence and is the EU's fourth largest supplier of pears. Romania, Austria, and Bulgaria dominate pear imports from Türkiye – pears are often re-exported.

China is the EU's fifth largest supplier of pears, and 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 8,500 MT and are not expected to change much in MY 2023/24. Imports of pears from the United States are currently non-existent due to the EU's strict Maximum Residue Level (MRL) for pesticides.

Pears - Exports

With some former export markets increasingly buying from the southern hemisphere, EU pear exports dropped from just over 450,000 MT in MY 2017/18 to over 346,000 MT in MY 2022/23. Pear exports are largely comprised of pears produced in the EU, as opposed to in the past when these exports were also composed of transshipments. For MY 2022/23 exports were similar to the year before, despite a larger domestic production last year.

EU pear exports to Belarus decreased in MY 2021/22, making it the second largest export market after the UK. Belarus regained its position as the largest EU export market for pears in MY 2022/23, see below table. Other countries that have proximity to Russia, including Kazakhstan, Kyrgyzstan, and Azerbaijan, are also important markets for Dutch and Belgian *Conference* pears. With low production

volumes in Italy, EU pear exports to former Soviet Republics are expected to slightly decrease in MY 2023/24 as Dutch and Belgian *Conference* pears can be sold in the internal EU market.

EU exports to the UK have fluctuated between 100,000 and 110,000 MT for many years but dropped to 95,000 MT in MY 2022/23. EU pear exports to the UK are expected to drop slightly in MY 2023/24 as well as exports to other solid and mature consumer markets in Europe, such as Norway and Switzerland.

Rocha pears are popular in Brazil but EU pear exports to Brazil further dropped in MY 2022/23 which was the direct result of Portugal's poor pear harvest. With an even lower harvest forecast for Portugal for MY 2023/24, EU pear exports to Brazil are expected to further decrease in MY 2023/24. Despite the low harvest forecast, Portuguese pear production continues to be somewhat higher than consumption, making Portugal a net exporter.

Despite higher logistics costs and uncertainties concerning COVID-19, EU pear exports to China picked up in MY 2022/23. Pear exports to China and Hong Kong together continue to fluctuate around 7,500 MT annually. For MY 2023/24, no major changes in export figures to this combined market are expected.

Table 9: EU Export of Pears in MT

Country of Destination	MY 2020/21	MY 2021/22	MY 2022/23	Change MY 2022/23 to MY 2021/22	Share of Total Imports in MY 2022/23
Belarus	112,621	77,289	**108,213**	40%	31%
United Kingdom	107,046	103,328	**95,983**	-7%	28%
Morocco	33,320	47,278	**34,337**	-27%	10%
Brazil	24,398	27,386	**21,106**	-23%	6%
Kazakhstan	12,996	15,068	**15,047**	0%	4%
Norway	13,035	12,960	**11,537**	-11%	3%
Switzerland	6,954	9,059	**8,015**	-12%	2%
China	6,581	5,205	**6,086**	17%	2%
Libya	3,436	6,504	**4,658**	-28%	1%
Ukraine	7,387	4,724	**4,604**	-3%	1%
Bosnia & Herzegovina	6,708	2,434	**3,406**	40%	1%
Kyrgyzstan	0	1,139	**2,931**	157%	1%
Saudi Arabia	5,571	3,895	**2,746**	-30%	1%
Serbia	2,787	2,518	**2,498**	-1%	1%
Israel	3,627	2,749	**2,471**	-10%	1%
Jordan	3,286	1,418	**2,334**	65%	1%
Azerbaijan	2,154	1,949	**1,893**	-3%	1%
Albania	2,279	2,283	**1,843**	-19%	1%
Senegal	2,556	1,488	**1,820**	22%	1%

Russia	1,339	6,344	**1,694**	-73%	1%
Canada	2,652	2,280	**1,603**	-30%	1%
UAE	3,004	2,044	**1,590**	-22%	1%
Other	12,814	9,485	**9,981**	5%	3%
Total	**376,551**	**348,827**	**346,396**	**-1%**	

Source: Trade Data Monitoring (TDM) accessed in September 2023

EU pear traders will continue to look at ways to diversify risk given the current geopolitical developments, high prices of international shipping, Brexit, and Russia's invasion of Ukraine. Supplying stable and nearby markets continues to be important for European traders while they keep an eye open for new markets on other continents (especially in Southeast Asia and Latin America). However, it will take several years to develop a new, sustainable markets, particularly for varieties that are unknown to consumers in new markets.

Pears – Prices

Producer prices for pears are expected to be good at the beginning of the season, mainly driven by a decrease in EU pear production and the overall good quality of this year's harvested pears. Consumer prices are not expected to go up as the inflation rates are slowly declining. Production costs remain high due to high prices for raw materials, packaging, energy, and labor.

Pears – Additional Information

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

Section III: Table Grapes

Table 10: Production, Supply, and Distribution – Tables Grapes

Grapes, Fresh Table	2021/2022		2022/2023		2023/2024	
Market Year Begins	Jun 2021		Jun 2022		Jun 2023	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	96,776	96,786	96,847	96,636	0	96,633
Area Harvested (HA)	91,692	92,671	91,799	92,968	0	92,748
Commercial Production (MT)	1,412,296	1,415,211	1,574,600	1,540,483	0	1.292,300
Non-Comm. Production (MT)	7,250	7,234	6,700	5,110	0	5,800
Production (MT)	1,419,546	1,422,445	1,581,300	1,545,593	0	1,298,100
Imports (MT)	604,100	603,674	590,000	573,108	0	630,000
Total Supply (MT)	2,023,646	2,026,119	2,171,300	2,118,701	0	1,928,100
Fresh Dom. Consumption (MT)	1,851,146	1,853,605	2,001,300	1,945,980	0	1,768,100
Exports (MT)	172,500	172,514	170,000	172,721	0	160,000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	2,023,646	2,026,119	2,171,300	2,118,701	0	1,928,100
(HA), (MT)						

Not official USDA data. Sources: Trade for MY 2021/22 and 2022/23: Trade Data Monitoring, LLC (TDM) accessed in September 2023; All other: FAS EU posts

Table Grapes – Commercial Production

The EU is a world leader in table grape production with Italy, Spain, and Greece accounting for approximately 92% of the EU's total production. In MY 2023/24 (June/May), commercial EU table grape production is forecast down from the previous season. This is mostly due to volume decreases in Italy, because of heavy rains during flowering in May and June. Production decreases are also forecast in Greece, France, and Bulgaria. Conversely, increased volumes are forecast in Spain and Romania. Stable production levels are projected for Portugal. Overall, fruit quality is forecast to be excellent with higher sugar content due to hot temperatures in July. MY 2023/24 EU table grape area is forecast to remain flat due to new seedless varieties entering into production in Italy (mainly in the Puglia region), Spain (in the region of Murcia), and Portugal (in the Ribatejo and Alentejo regions), replacing seeded ones. Rising input costs (namely energy and logistics) remain as major concerns for EU table grape growers.

Table 11: EU Commercial Table Grape Production by Country and Year in MT

COUNTRY	MY 2021/22	MY 2022/23	MY 2023/24e	Change 2023:2022	Share of Total EU Production in 2023
Italy	720,000	864,000	**604,800**	-30%	46.8 %
Spain	307,500	292,390	**320,000**	9.4%	24.8 %
Greece	271,997	270,000	**260,000**	-3.7%	20.1%
France	38,100	45,700	**40,000**	-12.5%	3.1%
Romania	45,700	38,000	**40,000**	5.3%	3.1%
Portugal	19,600	17,650	**17,500**	-0.9%	1.3%
Bulgaria	12,314	12,743	**10,000**	-21.5%	0.8%
Total	**1,415,211**	**1,540,483**	**1,292,300**	**-16.1%**	**100%**

e= estimated; due to rounding percentages add up to marginally less than 100%.
Source: FAS EU posts

Table Grapes – Non-Commercial Production

Non-commercial EU table grape production includes table grapes grown in home gardens, meadows, or field edges. MY 2023/24 non-commercial EU table grape production is forecast to increase by approximately 13.5% compared to the previous season due to higher volumes in Romania (up 18.8%).

Table Grapes – Consumption

In MY 2023/24, EU fresh grape consumption is forecast down from the previous season, mainly due to Italy's decreased production. Fresh grapes are increasingly perceived as a tasty and healthy snack. 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 represent approximately 30% of total consumption. These imports normally come in the first half of the calendar year from the southern hemisphere.

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

Table Grapes – Trade

Table Grapes - Imports

Unlike with apples and pears, the EU is a net importer of fresh table grapes. MY 2023/24 EU table grape imports are forecast up due to decreased domestic production. During MY 2022/23, EU table grape imports decreased by approximately 5% from the previous season, driven by increased domestic production. The largest EU importing countries remain the Netherlands and Germany. These are followed by France, Poland, Spain, Romania, Belgium, Czech Republic, Austria, Portugal, Sweden,

Slovenia, Italy, Denmark, Slovakia, Ireland, Hungary, Finland, Latvia, Lithuania, Croatia, Bulgaria, Estonia, Cyprus, Luxemburg, Greece, and Malta. The Netherlands serves mainly as a trans-shipping point.

Table 12: EU Imports of Table Grapes in MT

Country of Origin	MY 2020/21	MY 2021/22	MY 2022/23	Change MY2022/23 to MY2021/22	Share of Total Imports in MY 2022/23
South Africa	177,971	188,196	**153,714**	-18%	27%
Peru	99,254	98,871	**103,711**	5%	18%
India	84,412	87,238	**86,032**	-1%	15%
Chile	49,438	63,320	**68,266**	8%	12%
Egypt	47,805	42,662	**52,729**	24%	9%
Brazil	26,014	33,901	**25,083**	-26%	4%
Namibia	23,076	21,687	**24,935**	15%	4%
Moldova	16,098	19,654	**23,241**	18%	4%
Türkiye	30,053	32,708	**22,844**	-30%	4%
Morocco	4,914	5,691	**5,030**	-12%	1%
United States	**107**	**0**	**0**	**-32%**	**0**
Other	12,572	9,746	**7,524**	-22.8%	1%
Total	**571,714**	**603,674**	**573,108**	**-5%**	**100%**

Source: Trade Data Monitor, LLC (TDM) accessed in September 2023
Due to rounding percentages add up to marginally more than 100%.

Table Grapes - Exports

MY 2023/24 EU table grape exports are forecast down due to soaring freight, logistical, and transportation costs triggered by Russia's invasion of Ukraine. During MY 2022/23, EU table grape exports remained flat from the previous season despite the increased production as a result of high transportation costs and discouraging bureaucratic delays. Seedless varieties are mainly sent to the UK and the UAE.

Table 13: EU Exports of Table Grapes in MT

Country of Origin	MY 2020/21	MY 2021/22	MY 2022/23	Change MY2022/23 to MY2021/22	Share of Total Exports in MY 2022/23
United Kingdom	102,434	92,371	**86,912**	-6%	50%
Switzerland	27,788	27,363	**26,918**	-2%	16%
Norway	17,154	16,712	**15,787**	-6%	9%
Russia	2,369	4,821	**11,365**	136%	7%
Ukraine	2,865	2,206	**3,674**	67%	2%
South Africa	2,600	3,671	**2,759**	-25%	2%
Bosnia & Herzegovina	2,825	2,925	**2,697**	-8%	2%
Albania	2,513	1,798	**1,978**	10%	1%
Belarus	1,927	1,330	**1,873**	41%	1%
Malaysia	655	1,059	**1,592**	50%	1%
United States	**1,363**	**724**	**795**	**10%**	**0**
Other	15,501	17,534	**16,371**	-6.6%	9%
Total	**179,994**	**172,514**	**172,721**	**0%**	**100%**

Data source: Trade Data Monitor, LLC (TDM) accessed in September 2023; due to rounding percentages add up to marginally more than 100%.

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.

Section IV: Policy

Common Agricultural Policy Reform

The CAP supports agriculture and rural development throughout the EU with a significant portion of the total EU budget (about 39 percent). A political agreement was finalized on the CAP 2023-2027 after the "trialogue" negotiations concluded between the European Council, the European Commission, and the European Parliament over the summer 2021. The European Parliament granted final approval on November 23, 2021, and the Council provided final approval on December 2, 2021. The CAP legislative framework is delineated by the Common Market Organization, the Strategic Plan, and the Horizontal regulations. By these decisions, the new CAP began on January 1, 2023. Major changes from the previous CAP include a new "delivery model" that de-centralizes funding and a new requirement that EU Member States develop National Strategic Plans (NSPs) in line with Commission priorities, such as the EU Green Deal.

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. In March 2023, it allocated $271 million (€223 million) of EU funds for the school year 2023/2024 to all Member States according to Commission Implementing Decision (EU) 2023/655, which applies as of August 1, 2023.

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 2023, the European Commission allocated a total of approximately $197.4 million (185.9 million euros) 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. For more information about the EU's promotion program please see GAIN Reports EU 2023 Promotion Programs for Agricultural Products.

The European Green Deal

On December 11, 2019, the Commission presented its Communication on the European Green Deal. The flagship proposal is a draft European Climate Law that will make the EU's 2050 climate neutrality objective binding across the Union. The Green Deal includes a "Farm to Fork Strategy" and a "Biodiversity Strategy" that aim to support the Green Deal's objectives by fundamentally changing the way agriculture operates and how food is produced for, and provided to, EU consumers. Both strategies were published on May 20, 2020. Key aspects of the two Strategies include: reducing pesticide use, supports to domestic production of plant protein for animal feed, increasing organic production, and increasing soil and nature conservation by setting aside a minimum of 10 percent of the existing agricultural area into higher biodiversity landscape features.

The Farm to Fork Strategy

The F2F Strategy highlights 27 actions aimed to transform the way EU food is produced, processed, transported, presented, and sold. The full F2F Strategy is available here. The Commission identified these actions to further the Green Deal goals, reduce greenhouse gas emissions, and pursue economic growth decoupled from resource use. 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 percent by 2030, as well as the reduction of the use of fertilizers by at least 20 percent among other cuts. Additionally, the Commission set a goal that 25 percent of agricultural lands should be used for organic farming, up from the current 8 percent. For additional information on Green Deal pesticide use reduction proposals, including improved collection of pesticide use statistics and proposed revision of existing pesticide legislation, see GAIN report: Pesticides Initiatives in the EU Farm to Fork Strategy.

Biodiversity Strategy

The EU Biodiversity Strategy provides a broad focus on nature conservation and tackling biodiversity loss in the EU and globally. The full Biodiversity strategy is available here. 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. The Biodiversity Strategy also aims for further soil and nature conservation by setting aside a minimum of 10 percent 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 percent of all EU land.

Certification of Fruit and Vegetables

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

Regulation 2016/2031 concerning protective measures against pests of plants since December 14, 2019, contains provisions concerning compulsory plant health checks. This includes documentary, identity, and physical plant health checks to verify compliance with EU import requirements and uniform conditions for its implementation that are established in Commission Implementing Regulation (EU) 2019/2072. There is more information available on the DG SANTE website: Trade in plants and plant products from non-EU countries. The Commission monitors imports of fruit and vegetables on an annual basis to determine how to adjust the frequency of testing consignments. There is a reduced frequency of plant health checks for certain products when justified, as per Commission Implementing Regulation (EU) 2022/2389 of December 07, 2022. There is more information available on the DG SANTE website: Reduced frequency checks.

Note: The commission has updated the Notification of reduced plant health checks for 68 products for 2023.

Marketing Standards

Fresh fruit and vegetable imports into the EU also must comply with the 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 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 26 and for pears in Part 6 on page 63.

On April 21, 2023, the European Commission proposed to update the marketing standards of select agriculture products such as fresh fruit and vegetables, nuts, honey, juices, eggs and poultry. The new regulations will be published before the end of the year. See GAIN: European Commission Proposes to Update Marketing Standards for Agricultural Products

Maximum Residue Levels (MRLs)

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 citrus fruit in the global MRL database. For additional information, please consult the FAS/Brussels' website on EU Early Alerts.

Upcoming reviews for MRLs

Article 12 review: https://www.efsa.europa.eu/sites/default/files/pesticides-MRL-review-progress-report.pdf

Upcoming reviews for active substances*:*

Active substance	**Expiration date**	**Last day of application for renewal of the active substance**
Fenpicoxamid	10/11/2028	11/10/2025
Oxathiapiprolin	03/03/2027	03/03/2024

Glyphosate

The renewal procedure for the active substance glyphosate is currently ongoing as it will expire on December 15, 2023, after a one-year extension of its approval period. The European Commission put forward a draft regulation to the Member States on September 20, 2023, proposing a renewal for the authorization of glyphosate. The representatives of the EU Member States discussed the draft regulation in the Standing Committee on Plants, Animals, Food and Feed (PAFF) on September 22, 2023, and did not reach a qualified majority in favor or against the proposal. The proposal was then referred to the appeal committee.

Sustainable Use of Pesticides Regulation (SUR)

The F2F Strategy outlines the draft proposal revising the Sustainable Use of Pesticides Directive (SUD). The revision aims to "significantly reduce use and risk and dependency on pesticides and enhance integrated pest management". On June 2, 2022, the European Commission adopted its proposal for a new Regulation on the Sustainable Use of Plant Protection Products (SUR). The Commission's preferred scenario is to prohibit the use of all chemical pesticides in sensitive areas. As for the reduction targets, the preferred option would be to have the 50% reduction targets become legally binding at the EU level, while Member States would be setting their own national reduction targets using established criteria. The proposal is currently still going through the legislative procedure and will not be finalized anytime soon.

Tariffs and Free Trade Agreements

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 that 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. The tariff and statistical nomenclature and the Common Custom tariff levels for 2023 are published in Commission Implementing Regulation (EU) 2022/1998 in EU Official Journal L 282. This version applies as of January 01, 2023. The tariffs for FDF can be found on the following pages:
Apples see pages 108 and 750
Pears see pages 108 and 750
Concentrated Apple Juice see pages 176-177
Grapes see pages 105 and 750 (certificate 1074)

First Come, First Served Principle: Regarding the administration of import tariff quotas, certain types of stone 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	0%
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 20 2008 30 **2008 40** 2008 50 2008 60 2008 70 2008 80	2,820,000 (for all commodities)	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. Subject to ratification by the EU Parliament and Commission, the agreement 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: EU Trade agreements (europa.eu)

EU Policy Response to the War in Ukraine

On March 23, 2022, the European Commission published a Communication on 'Safeguarding food security and reinforcing the resilience of food systems,'. This Communication outlines short-term and medium-term actions that the EU will take to enhance global food security and support EU farmers given rising commodity prices and costs for energy and fertilizer inputs due to the war in Ukraine. A total of €500 million has been allocated to member states to directly support EU farmers most affected by higher input costs and the closure of export markets. Member States can supplement this support up to 200 percent using national funds. Despite the measures in place, the European fresh produce sector remains concerned about market stability since the focus of this support is on crops and fertilizer availability.

EU Fertilizer Plan

On November 9, 2022, the European Commission published a Communication on the availability and affordability of fertilizers in the EU. The aim of this long-awaited document was to propose solutions to address the significant input price increases EU farmers are facing, which grew by 149 percent from September 2021 to September 2022 for nitrogen fertilizers. The Communication proposes using emergency funds from the CAP 2023 agricultural reserve to stabilize agricultural markets and create a market observatory system for fertilizer prices. Additional information may be viewed at: EC Factsheet: Ensuring the availability and affordability of fertilizers

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 on an annual basis. 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 million tons of withdrawals from the market.

Section V: 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. **FRUIT LOGISTICA** Berlin, Germany (Interval: yearly) 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. www.fruitlogistica.de/en	Next Fair: February 7-9, 2024

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	Next Fair: February 13-16, 2024

Section VI: Related Reports

For related reports please search the USDA/FAS GAIN database: https://gain.fas.usda.gov/#/search

European Commission Proposes to Update Marketing Standards for Agricultural Products | E42023-0017Brussels USEU | European Union | Published On: May 02, 2023 European Commission Proposes to Update Marketing Standards for Agricultural Products_Brussels USEU_European Union_E42023-0017
Prognosfruit 2023 - EU Apple and Pear Production is Forecast to Decline | E42023-0036Berlin | European Union | Published On: August 31, 2023 Prognosfruit 2023 - EU Apple and Pear Production is Forecast to Decline_Berlin_European Union_E42023-0036
More Pears and Less Apples Expected in the Netherlands | NL2023-0008The Hague | Netherlands | Published On: October 11, 2023 More Pears and Less Apples Expected in the Netherlands_The Hague_Netherlands_NL2023-0008
Dutch Considering a Zero Percent Value Added Tax on Vegetables and Fruit | NL2022-0066The Hague | Netherlands | Published On: December 14, 2022 Dutch Considering a Zero Percent Value Added Tax on Vegetables and Fruit_The Hague_Netherlands_NL2022-0066
Results of the German Fruit Tree Census 2022 | GM2022-0033Berlin | Germany Published On: October 25, 2022 Results of the German Fruit Tree Census 2022_Berlin_Germany_GM2022-0033
Product Brief Fresh Fruit | GM2022-0024Berlin | Germany Published On: August 24, 2022 Product Brief Fresh Fruit_Berlin_Germany_GM2022-0024
Spanish Fresh Deciduous Fruit Committed to Sustainability and Smart Farming | SP2021-0025Madrid | Spain, Published On: October 06, 2021 Spanish Fresh Deciduous Fruit Committed to Sustainability and Smart Farming_Madrid_Spain_09-29-2021
French legislation threatens millions of dollars of US fruit and vegetable exports Gain Report FR2021-004
Portuguese Fruit Sector Aims to Increase Investments Efficiency and Exports | PO2021-0017Madrid | Portugal, Published On: June 29, 2021 Portuguese Fruit Sector Aims to Increase Investments Efficiency and Exports_Madrid_Portugal_06-21-2021

Attachments:

No Attachments