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Report Highlights:

EU commercial apple production in Marketing Year (MY) 2024/25 is forecast at 10.2 MMT, a decrease of 11 percent compared to the previous year, resulting from severe frost damage in the Eastern part of the EU. EU commercial pear production is expected to total 1.78 MMT; 4 percent higher than the previous year but still the third-smallest harvest in the past decade. EU commercial table grape production is forecast at the lowest level in at least two decades, down 17 percent from the previous season at 1.09 MMT, due to unfavorable weather conditions.

This report covers the following 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, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, the 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.

Table of Contents

Executive Summary

Apples

Commercial apple production in Marketing Year (MY) 2023/24 (July/June) is forecast at 10,192,120 metric tons (MT) a drop of 11% compared to the previous year. The reduction is mainly a result of severe frost damage in major production regions in Poland, Germany, Hungary, Czechia, and Belgium. Despite these conditions, overall quality of surviving fruit is expected to be good, as hail damage remained localized in Italy and Slovenia. Market prospects are good. Beginning stocks were low for fresh apples and very low for concentrated apple juice. The latter is important as the processing sector absorbs significant amounts of low-quality apples that would otherwise be sold as table fruit. Since 2014, U.S. apple exports to the EU have remained low due to EU technical trade barriers associated with 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

Pear cultivation in the EU continues to face challenges. MY 2024/25 (July/June) EU commercial pear production is expected to amount to 1,792,465 MT. Although this represents a 4 percent increase compared to MY 2023/24, it is the third-smallest harvest in the past decade. This is below-average harvest is due to an ongoing decline in area harvested and weather-related yield impacts. Hailstorms, severe winds, and frost hit Belgium, Italy, and Poland, and other countries while extreme high temperatures were recorded in the Iberian Peninsula. Uncertain climatic conditions also resulted in increasing pressure from diseases and pests in Belgium, Italy, Portugal, and Poland. Pear growers are also facing an increase in costs – for production, for protecting orchards from adverse weather conditions, and for fighting diseases. Pear consumption is declining among young and affluent consumers where pears are competing with convenient snack products or more exotic fruit options. Local supermarkets are the main distributors of pears and pears are predominantly eaten at home as snacks between meals. For MY 2024/25, imports are forecast to be somewhat lower while exports are forecast to remain low mainly due to the record low *Conference* variety crop.

Table Grapes

MY 2024/25 (June/May), EU table grape commercial production is forecast down 17 percent from the previous season totaling 1,086,580 MT. Production is anticipated to decline in all member states due to unfavorable weather, except for Spain, where production will likely increase due to higher acreage devoted to seedless varieties and mild temperatures prevailing during fruit development which resulted in improved yields. Overall, fruit quality is forecast to be excellent with higher sugar content due to hot temperatures from June to September. EU table grape imports from the United States are rare. EU table grape exports to the United States are marginal.

Impact of Climate Change

Climate change increasingly affects EU production. In the northern parts of the EU, mild winters lead to earlier blossoming and blossoms and/or young fruit are further developed when late frosts hit. This increases the threat of frost damage. In the southern parts of the EU, mild winters can lead to insufficient chill hours to break dormancy. This results in uneven bud break and blossoming and consequently uneven ripening of fruit. Later in the season the occurrence of hail and thunderstorms, droughts, or floods has significantly increased. Additionally, sunburn has become an issue even in the northern member states where this used to be virtually unknown. As a result, farmers increasingly opt to protect new orchards with hail nets, frost protection,[1] and irrigation. This significantly increases production costs.

Impact of Geopolitical Conflicts

More than two years after Russia invaded Ukraine the conflict continues to create direct and indirect challenges for fresh deciduous fruit production, raising production costs. Direct effects include the lack of seasonal workers from Ukraine, many of which are now fighting in the war while refugees from Ukraine resident in the EU typically prefer year-round jobs over seasonal work. Indirect effects include increased production costs due to increased prices, especially for energy. While in most member states electricity prices have fallen from 2022 record levels, they are still higher than before the invasion and contribute to high storage costs for fruits. This takes a toll on the profitability of fruit production. Houthi attacks on commercial vessels in the Red Sea in support of Hamas in the Gaza conflict increased risk and logistic costs for EU fruit exports to Asia. This has made exports more expensive, and some exporters may attempt to diversify to other markets.

Impact of High Inflation

While inflation has declined from the previous MY, it continues to affect the profitability of deciduous fruit farming in the EU. Inflation has hit farmers hard as they have to pay more for their inputs (labor, energy, fertilizer, plant protection, irrigation, packaging) and logistics, without being able to pass down higher production costs along the supply chain. As a result, some farmers are delaying needed investments, such as the replanting of old orchards. Others have depleted their savings and or exhausted their credit lines and ceased operation. Additionally, farmers at retirement age find it increasingly difficult to find successors.

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

[1] Including anti-frost irrigation and wind machines.

Section I: Apples

Table 1: Production, Supply, and Distribution – Apples

Apples, Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Jul 2022		Jul 2023		Jul 2024	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	481,250	477,980	477,200	471,960		468,000
Area Harvested (HA)	454,695	454,695	450,000	452,296		448,400
Commercial Production (MT)	11,844,930	11,889,241	11,554,700	11,447,749		10,192,120
Non-Comm. Production (MT)	838,390	838,354	653,400	642,660		816,500
Production (MT)	12,683,320	12,727,595	12,208,100	12,090,409		11,008,620
Imports (MT)	238,200	238,219	275,000	256,058		350,000
Total Supply (MT)	12,921,520	12,965,814	12,483,100	12,346,467		11,358,620
Domestic Consumption (MT)	11,886,820	11,931,333	11,513,100	11,396,026		10,408,620
Exports (MT)	1,034,700	1,034,481	970,000	950,441		950,000
Withdrawal From Market (MT)	0	0	0	0		0
Total Distribution (MT)	12,921,520	12,965,814	12,483,100	12,346,467		11,358,620
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Not official USDA data. Sources: Area planted for MY 2022/23 and 2023/24: Eurostat; trade for MY 2022/23 and 2023/24: Trade Data Monitoring, LLC (TDM) accessed on September 27, 2024; All other: FAS EU posts

Apples - Commercial Production[2]

The EU is one of the leading producers and consumers of apples world-wide. Commercial apple production exists in all member states (MS), except for Malta. 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 percent of total EU commercial apple production. EU commercial apple producers feel squeezed between higher risks resulting from climate change; higher production costs resulting from increased inputs costs; ever-increasing restrictions on fertilizer and pesticide application; and insufficient prices to make up for higher costs. As a result, some farmers are delaying investments, for example by postponing replanting of old orchards. Others have depleted their savings and or exhausted their credit lines and closed operation. Older farmers approaching retirement reportedly find it increasingly difficult to find successors.

Area

EU harvested apple area showed a small decline of 0.9 percent in MY 2024/25 with reductions mostly occurring in Poland, Hungary, Belgium, Czechia, the Netherlands, and France. Smaller reductions were recorded in Sweden, Romania, Austria, Italy, and Germany. In Bulgaria and Slovakia, the harvested area rebounded from the previous MY to more normal levels. Denmark is the only country that recorded an expansion of harvested area exceeding long-term levels.

- In Poland, some apple growers have abandoned production in favor of other fruits, mainly pears and cherries.
- In Hungary, the harvested area of apple orchards has steadily decreased over the last 25 years, from 42,000 ha at the turn of the millennium to 22,300 ha today. Overall, yields remain relatively low as more than two thirds of orchards do not have irrigation and/or intensive growing systems.
- In Belgium, the sector is diversifying its apple variety spectrum away from traditional *Jonagold* and *Jonagored* apples. While acreage dedicated to non-traditional varieties has increased 30 percent, this increase is not enough to compensate for acreage losses for *Jonagold* group varieties.
- In the Netherlands, the reduction in area harvested is a reaction to disappointing profit margins in the past decade, increasing restrictions in pesticide use, and the lack of successors to run family farms. As a result, some orchards that have reached the end of their production cycle are not being replanted.

Production

Commercial apple production in MY 2024/25 is forecast to decrease by 11 percent compared to the previous year, largely due to frosts in late spring. In absolute terms the decreases are highest in Poland, Germany, Hungary, Czechia, and Belgium with roughly 800,000 MT, 153,000 MT, 146,000 MT, 78,000

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

MT, and 67,000 MT lower projected productions, respectively. While production is forecast to increase in Greece, Slovenia, Spain, Slovakia, and to a lower extent in Denmark and Bulgaria, the combined increase is not sufficient to compensate for reductions elsewhere.

A major factor contributing to lower production were late spring frosts. The EU offered financial support from its agricultural reserve for producers in the most-affected countries including Poland, Austria, and Czechia. Some countries and/or regional governments also provided support.

Climate change increasingly affects EU production. Mild winters lead to earlier blossoming and flowers and young fruits being further developed when late frosts hit. This increased the threat of frost damage. This year late frosts in the second half of April especially affected Poland, Hungary, Czechia, Austria, Belgium, and Eastern Germany. Additionally, the frequency of droughts and floods increased. In contrast, Spain and Greece benefitted from a milder summer and a better precipitation pattern compared to drought conditions in the previous year.

Organic Production

For years, organic production was a growing segment in the EU deciduous fruit sector. However, consumer demand has suffered from economic challenges following international crises and resulting inflation. Industry reports that consumer demand for organic products has suffered even more from economic pressure than for conventional food due to its higher prices. Agricultural stakeholders are concerned that at projected growth rates EU organic apple production could soon outpace consumption demand. As a result, growers are reluctant to expand their organic apple production, and in some cases even revert to conventional production.

Data on organic apple production is not available for all member states. According to Eurostat, in 2022 (latest available data), the six member states with the largest organic apple acreage were France, Germany, Italy, Poland, Hungary, and Romania, together accounting for 82 percent of organic apple area.

At Prognosfruit,[3] EU organic production was forecast to decrease to 535,000 MT compared to 606,000 MT in 2023, taking the organic sector's share of total EU apple production down to 5.24 percent (compared to 5.32 percent in 2023). This is well below the 25 percent market share goal the EU set for 2030, making it highly unlikely that this goal will be achieved.

[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: www.prognosfruit.eu/.

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

COUNTRY	2022/23	2023/24	2024/25 e	Change 2023 to 2024	Share of Total Production in 2024
Poland	4,400,000	4,000,000	3,200,000	-20%	31%
Italy	2,112,975	2,174,674	2,162,490	-1%	21%
France	1,446,000	1,587,000	1,546,000	-3%	15%
Germany	1,070,978	941,212	788,040	-16%	8%
Spain	419,817	454,320	464,150	2%	5%
Romania	410,000	405,000	370,000	-9%	4%
Hungary	324,244	451,460	305,000	-32%	3%
Greece	310,000	220,000	290,000	32%	3%
Portugal	292,859	289,316	289,320	0%	3%
The Netherlands	235,000	199,000	197,000	-1%	2%
Belgium	234,000	197,000	130,000	-34%	1%
Austria	190,588	156,309	120,000	-23%	1%
Croatia	46,811	66,215	60,500	-9%	1%
Slovenia	48,838	30,598	59,000	93%	1%
Slovak Republic	31,068	26,395	35,580	35%	0.3%
Bulgaria	44,200	32,933	33,000	0%	0.3%
Lithuania	48,000	35,000	32,000	-9%	0.3%
Sweden	32,000	32,000	32,000	0%	0.3%
Czechia	131,353	101,017	23,440	-77%	0.2%
Denmark	24,000	15,000	21,000	40%	0.2%
Ireland	19,500	19,500	18,800	-4%	0.2%
Finland	7,010	7,800	7,800	0%	0.1%
Latvia	10,000	6,000	7,000	17%	0.1%
Total	**11,889,241**	**11,447,749**	**10,192,120**	**-3.71%**	

e= estimated; Note: The table is grouped by ranking in MY 2024/25. Due to rounding, percentages add up to marginally more than 100 percent. Source: FAS EU posts

Member State Specific Production Information

- In Poland, projected lower production is a result of a combination of poor pollination, frost and hail damage, and increased occurrence of pests and fungal diseases. Due to the mild winter, the growing season started two to three weeks earlier than normal. When flowering started, pollinator insects were not as active yet as in normal years. Additionally, flowers and already set fruit were damaged by frost waves in late April. Rainfall in the second half of May, June, and July in many areas of the country promoted the development of fungal diseases, while in some areas in Eastern Poland insufficient rainfall resulted in small fruit and below-average fruit quality. In September, floods resulted in water-logged orchards in southwestern Poland and severe damage to trees and equipment, however the full extent of these losses is still difficult to assess. Apple quality in MY 2024/25 varies greatly, depending on region and producer. Harvest

began two weeks earlier than in previous years. In eastern and central Poland, local sources report difficulty finding harvest workers. The situation was exacerbated by the earlier start of the apple harvest, and the fact that the harvest overlapped with harvesting of other crops such as blueberries, tomatoes, and cucumbers.

- Italian production is forecast to remain stable compared to MY 2023/24, however, harvests in some regions declined while others grew. Volume decreases in the Alto Adige (down 9 percent) and Trentino (down 7 percent) regions due to spring frosts were counterbalanced by increased quantities in Veneto (up 33 percent), Emilia-Romagna (up 15 percent), and Piemonte (up 8 percent), thanks to favorable weather during flowering and fruit set. Quality is expected to be excellent. Producers report challenges associated with climate change and increased production costs.
- After a sizeable crop in MY2023/24, French apple production is expected to slightly decline by 2 percent in 2024, but still remains 6 percent above the five-year average. Production in the southern regions is up as flowering and fruit growth benefited from good weather and rainfall in the winter and spring replenished water reservoirs. Farmers in those regions were also able to control pests. In contrast, production in western France was negatively impacted by excessive rainfall that increased pests and fungus infestation. Some frost in early spring especially impacted *Golden Delicious* orchards. Local hailstorms also damaged apple crops in southwestern regions.
- Spanish apple production is expected to exceed the low levels seen in MY 2023/24 due to timely rainfall, despite spring frosts and the presence of fire blight in some orchards.
- Germany expects the second-lowest production level in ten years. This is a result of spring frosts in the last week of April which especially affected the eastern part of the country. Fruit quality is expected to be excellent. In addition to a general increase in production costs, German farmers faced increased labor costs resulting from an increase in the minimum wage. From January 1, 2021, to January 1, 2024, the minimum wage (which also applies to seasonal labor) increased in five installments from 9.50 Euro to 12.41 Euro per hour. The next increase to 12.82 Euro will occur on January 1, 2025.
- Hungary expects a weaker-than-average harvest. Frost damage occurred mainly in the north-eastern part of the country, while the whole country suffered from drought conditions during flowering which decreased fertility. These highly fluctuating weather conditions resulted in weaker than average fruit set and in more intense fruit fall in May and June. Additionally, hailstorms reduced yields in some parts of the country. As of June, extreme heatwaves and severe droughts accompanied by high UV radiation negatively affected apple production. As a result, sunburn damage occurred in unirrigated orchards on sandy soils and fruit size is smaller than usual.
- Romania's apple production is projected to drop 10 percent as a result of several negative weather factors. The mild winter caused fruit to develop 3-4 weeks earlier. Low spring temperatures, including late frosts in some regions, along with large temperature differences between day and night compromised part of the fruits already grown. Fruit size and fruit quality

are expected to be relatively lower than average. 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. Some small family farms are developing outreach and "pick your own"- models, in an effort to reduce costs and collection time.

- Greece's MY 2024/25 apple production is forecast to increase by 31.8 percent; rebounding from the disastrous effects of storm 'Daniel' that hit central Greece on September 5, 2023. Spring weather favoured fruit set and fruit development. However, the summer drought and high temperatures reduced yields for some varieties. Fruit quality is expected to be very good.
- Dutch apple production in MY204/25 is projected to be marginally lower than last year, at a 10-year low. This is due to a decrease in harvested area and uncooperative weather, including cold and wet spells. Given this year's erratic spring weather, fruit thinning was hardly needed due to abundant physiological fruit drop.[4] Harvesting began in mid-August. The quality (taste, color, and storing quality) of this year's apples is expected to be good.
- Lower production in Belgium is mainly due to continuing reduction in area harvested, combined with lower yields due to wet and harsh weather with hail and frost during the growing season. Fruit quality is expected to be good due to abundant moisture.
- In MY2024/25, Austrian commercial apple production is forecast to be even worse than the low crop in MY2023/24. An above-average warm start to the year (January, February and March) was followed by extreme frost events. In combination with vegetation starting an average of three weeks earlier, the frost that lasted for a week from April 16 led to severe damage, particularly to stone and pome fruits. According to industry estimates, 50 percent of the total fruit growing area is affected. According to initial surveys by the Austrian hail insurance company, the damage caused by this year's frost event amounts to 56 million Euros nationwide, 44 million euros of which is in the fruit sector. Styria is most affected and is the most important fruit growing state, accounting for roughly three quarters of Austrian apple production. In contrast, non-commercial production is forecast to be high as many non-commercial orchards are located in areas with no frost damage. This will likely result in increased apple processing.

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

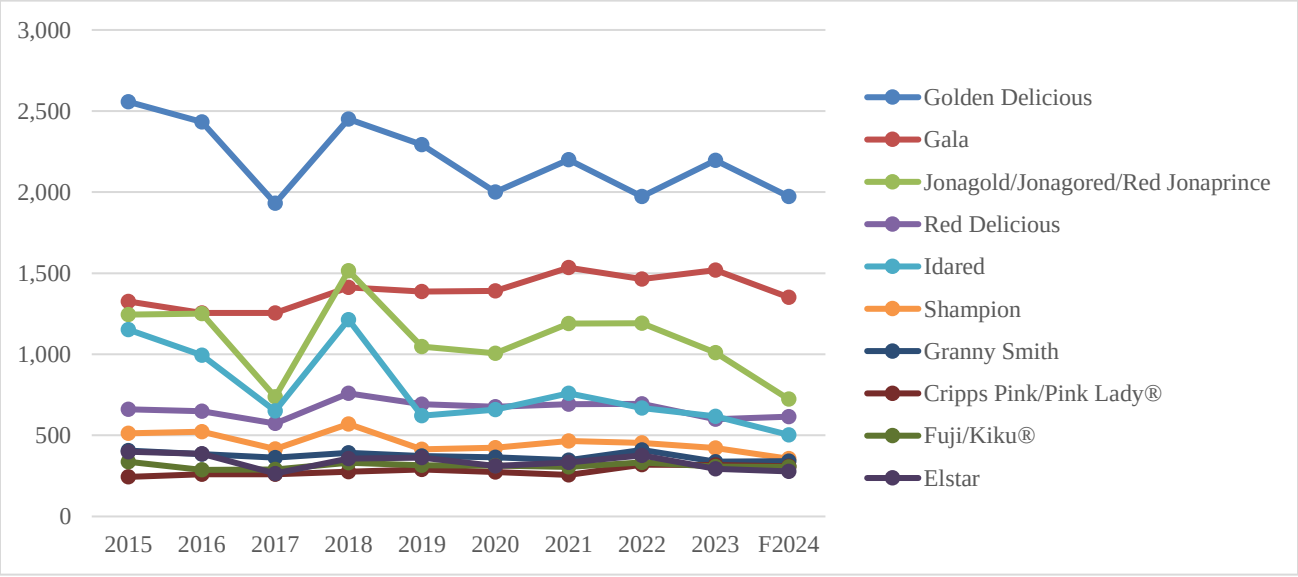
[4] Physiological fruit drop also known as "June drop" is a naturally occurring phenomenon, in which trees shed excess fruit that they cannot support with the resources available. It happens in the early stages of fruit development when fruit diameter is between 0.5 and one inch, usually in June. It is caused by a shortfall of carbohydrates in the tree. Cool and cloudy weather after blossoming increases the drop rate as it results in lower photosynthesis activity and ultimately lower availability of carbohydrates in the tree.

the first time in decades its acreage share in Belgium will be below 50 percent. 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 Russian import ban[5] 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. 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*.

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 and reduce disease management costs. Examples of such varieties include *Topaz* and *Santana*.

New varieties, for example *Pink Lady®*, *Kanzi®*, *Rubens®*, *Tentation®*, *Wellant*, *Cameo*, and *Kiku®*, have increased their production shares in recent years. Among these, trademark protected "Club[6]" varieties are gaining traction. Denmark, the Netherlands, and France have the highest share of "new" varieties in their production portfolio with 33 percent, 14 percent, and 14 percent of these varieties making up their respective total production. Club varieties are targeting the premium market. However, the proliferation of club varieties may face headwinds due to an expanding number of varieties competing for limited shelf space and consumer attention. A special form of the club concept are supermarket/grower cooperations that grant a retail chain exclusive marketing rights to a certain variety.

Chart 1: EU27 Apple Production for Top 10 Varieties in 1,000 MT



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

[5] See policy section.
[6] 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.

Apples - Non-commercial Production

Non-commercial production in MY 2024/25 is estimated to rebound and increase by 27 percent compared to the MY 2023/24 harvest. This is mostly due to a rebound of production in Germany, Austria, and Slovenia that exceeds lower production in Czechia, Romania, and Belgium. Non-commercial production tends to alternate between good and poor crop years. In MY 2024/25, non-commercial production represents about 7.4 percent of total apple production, compared to 5.3 percent 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 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 (WAPA), EU-27 apple stocks amounted to 439,476 MT on July 1, 2024, compared to 338,421 MT at the same time in 2023. While this is an increase, it is still below the average of the preceding five years.

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 affect 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 and the Netherlands, where the respective number-one fruits are oranges and bananas. 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) or turn to other snacks outside the fruit category. 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 2024/25, apple processing is expected to decrease 15 percent compared to MY 2023/24, amounting to roughly 3.6 MMT. However, this masks counter developments in some MS. Volumes going into processing are expected to decrease in Poland, Hungary, Romania, Italy, Czechia, Croatia, and Ireland as a result of lower commercial and non-commercial production. In contrast, volumes going into processing are projected to be higher in Germany, Slovenia, and Austria, based on higher non-commercial production.

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 more than 60 percent in Poland.

Apples – Trade

The majority of apple trade occurs between EU member states. Over the past five years, on average about 1.8 million MT of apples were traded between EU member states, while roughly 250,000 to 390,000 MT were imported from outside the EU. In recent years, imports from outside the EU accounted for between 2 percent and 4 percent 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 190,000 MT over 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 8,700 and 20,000 MT, in recent years, with the vast majority going to Ireland. Trade flows changed significantly 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, Germany, and the Netherlands, to avoid the need for Brexit-related paperwork now required when shipping to Ireland via the UK.

Apples - Imports

For MY 2024/25, EU-27 imports are expected to significantly increase, as a result of lower domestic production.

In MY 2023/24, about 57 percent of EU-27 apple imports originated from the southern hemisphere (Chile, South Africa, New Zealand, Argentina, and Brazil) and occurred mostly counter-seasonally to European production. Major origins in the Northern Hemisphere included neighboring countries such as the UK. The Netherlands was by far the largest importer of apples, accounting for 28 percent 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' EU market share has declined 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. Following Brexit, U.S. exports to the EU have virtually ceased.

Table 3: EU27 Imports of Apples in MT

Country of Origin	MY 2021/22	MY 2022/23	MY 2023/24	Change MY 2022/23 To MY 2023/24	Share of Total Imports in MY 2023/24
Chile	116,821	70,132	57,166	-18%	22%
South Africa	40,652	36,125	52,820	46%	21%
North Macedonia	51,730	30,201	39,014	29%	15%
New Zealand	53,224	40,843	28,330	-31%	11%
Serbia	16,104	9,455	24,453	159%	10%
Moldova	8,997	12,603	21,160	68%	8%
United Kingdom	7,881	17,534	11,428	-35%	4%
Ukraine	6,945	3,972	9,822	147%	4%
Argentina	8,814	4,629	4,495	-3%	2%
Brazil	7,539	6,492	3,592	-45%	1%
Turkey	456	297	1,162	291%	0.5%
United States	18	0	0		0%
Other	12,156	5,936	2,616	-56%	1%
World total	**331,33**	**238,219**	**256,058**	**7%**	

Note: The table is grouped by ranking in MY 2023/24. Due to rounding percentages may add up to marginally less or more than 100%. Source: TDM, LLC accessed on September 19, 2024

Apples - Exports

In MY 2024/25, EU apple exports are forecast to remain unchanged compared to the previous MY due to low production. Some individual member states such as Greece and Slovenia may see their exports increase as a result of a rebound in local production. However, these increases are offset by declines elsewhere. Destinations for EU apples may shift due to a temporary import ban in Kazakhstan (effective October through December 2024) and private sector efforts to further penetrate the Indian market. Local

sources report exports to Asia are getting more expensive as Houthi attacks of commercial ships in the Red Sea forces exporters to send their ships via a longer route or pay higher insurance.

In MY 2023/24, Italy, Poland, France, Spain, and Portugal were the top five apple exporters by volume amongst EU member states for destinations outside of the EU, they accounted for 35 percent, 30 percent, 16 percent, 6 percent, and 3 percent of total EU apples exports, respectively. The UK remained the most important buyer of EU apples. Exports to Egypt remained significantly reduced as the Egyptian government tightened restrictions on the export of foreign currency. Italy and Portugal further increased exports to Brazil.

In response to the 2014 Russian import ban, EU exporters attempted to increase 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 4: EU-27 Exports of Apples in MT

Country of Destination	MY 2021/22	MY 2022/23	MY 2023/24	Change MY 2022/23 To MY 2023/24	Share of Total Exports in MY 2023/24
United Kingdom	195,227	171,023	189,940	11%	20%
Egypt	302,203	162,734	87,644	-46%	9%
Brazil	9,237	59,447	86,506	46%	9%
Saudi Arabia	82,075	85,042	74,719	-12%	8%
India	90,765	81,432	64,110	-21%	7%
Kazakhstan	58,919	58,497	62,203	6%	7%
Israel	31,239	27,312	37,552	37%	4%
Norway	31,495	33,638	33,258	-1%	3%
Belarus	63,993	39,003	29,558	-24%	3%
United Arab Emirates	35,438	40,301	28,960	-28%	3%
Colombia	16,318	20,793	25,466	22%	3%
Jordan	27,005	22,585	21,740	-4%	2%
Switzerland	16,210	14,930	18,518	24%	2%
Mongolia	15,511	17,578	18,325	4%	2%
Bosnia & Herzegovina	12,105	15,469	14,854	-4%	2%
Ecuador	7,644	10,749	12,919	20%	1.4%
Libya	10,671	10,429	12,838	23%	1.4%
Albania	7,484	10,008	9,283	-7%	1.0%
Vietnam	5,783	10,090	9,040	-10%	1.0%
Morocco	6,771	8,905	7,796	-12%	0.8%
Guatemala	7,170	9,380	7,706	-18%	0.8%
Mauritania	7,326	7,945	7,566	-5%	0.8%
Uzbekistan	3,700	3,879	6,517	68%	0.7%
Qatar	8,375	9,671	6,472	-33%	0.7%
United States	72	111	21	-81%	0%
Other	216,496	159,049	159,441	0.25%	8.1%
World total	**1,148,659**	**1,034,481**	**950,441**	**-8%**	

Note: The table is grouped by ranking in MY 2023/24. Due to rounding percentages may add up to marginally less or more than 100 percent. Source: TDM, LLC accessed on September 27, 2024

The five largest EU exporters, together account for 90 percent of EU apple exports in MY 2023/24. These were Poland (mostly to Kazakhstan, Egypt, India, Belarus, UK, and Mongolia), Italy (to Saudi Arabia, Brazil, UK, Israel, India, Norway, Egypt, Switzerland, the UAE, Libya), France (mainly to the UK, the UAE, Colombia, Vietnam, Israel, and Brazil), Spain (mostly to the UK, Brazil, Morocco, Mauritania, and Colombia), and Portugal (mainly to Brazil, Cape Verde, Colombia, the UK, and Costa Rica).

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, Croatia, Spain
UAE	Italy, France, Spain
India	Poland, Italy, France, Germany, Greece, Belgium

Apples – Prices

Producer prices for apples are expected to be better than in the previous season as they benefit from lower EU production, low stocks, and good demand from the processing sector which absorbs lower quality apples, keeping them out of the table apple market. Higher prices are desperately needed as many farmers have drawn down their savings to compensate for increased production costs over the past few years. The latter include high prices for input costs such as fertilizer, plant protection, energy, packaging, and labor, as well as higher investment costs for new orchards.

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 5: Production, Supply, and Distribution – Pears

Pears, Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Jul 2022		Jul 2023		Jul 2024	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	106,419	105,516	105,516	103,840		104,775
Area Harvested (HA)	102,774	101,855	101,855	100,613		100,340
Commercial Production (MT)	1,992,137	2,001,922	1,747,521	1,725,591		1,782,444
Non-Comm. Production (MT)	89,178	90,221	84,550	81,727		85,900
Production (MT)	2,081,315	2,092,143	1,832,071	1,807,318		1,878,365
Imports (MT)	140,200	140,219	185,000	182,246		160,000
Total Supply (MT)	2,221,515	2,232,362	2,017,071	1,989,564		2,028,344
Domestic Consumption (MT)	1,873,115	1,884,050	1,717,071	1,695,495		1,738,344
Exports (MT)	348,400	348,312	300,000	294,069		290,000
Withdrawal From Market (MT)	0	0	0	0		0
Total Distribution (MT)	2,221,515	2,232,362	2,017,071	1,989,564		2,028,344
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Not official USDA data. Sources: Trade for MY 2022/23 and 2023/24: Trade Data Monitoring, LLC (TDM) accessed in September 2024; All other: FAS EU posts

Pears – Production

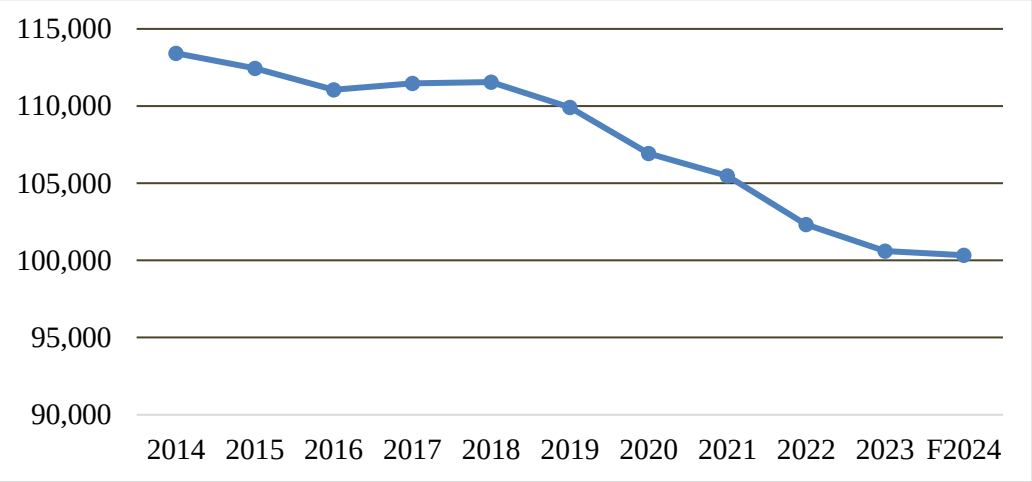
Pears – Commercial Production

EU commercial pear production is forecast at 1,782,440 MT. Although an increase of 3 percent (or 56,853 MT) compared to MY 2023/24, it is the third-smallest harvest in the past decade. Italy, the Netherlands, Belgium, Spain, France, and Portugal lead production and combined, represent 85 percent of total EU commercial production of pears in MY 2024/25. The production of organically produced

pears is estimated at 70,000 MT this year, or 4 percent of total production – with more than half produced in just Italy and Belgium.

Over the past ten years, area harvested decreased by more than 13,000 hectares and in 2024 totaled just over 100,000 hectares. This decrease is the sum of reduced areas harvested in many countries, including Portugal, Croatia, Czechia, Hungary, Belgium, and, particularly, in Italy. This downward trend is expected to continue due to disappointing profits, a lack of generational interest in running family farms, increasing difficulties with and limitations on pesticide use, and high investment costs associated with replanting.

Chart 2: EU Area Harvested Pear by Year in Ha



Source: FAS EU posts

In addition to a decrease in harvested area, this year's low harvest is mainly the result of weather-related events resulting in fewer pears per tree harvested. At the end of the growing season, hailstorms and severe winds hit the Emilia-Romagna region in Italy, resulting in pears falling from trees. Adverse weather conditions were also reported in Belgium where hailstorms and frost during the growing season resulted in lower yields. Given the high number of cold and record number of wet days, the growing season in the Netherlands was challenging resulting in fewer pears per tree and smaller fruit sizes. The mild winter in Portugal also negatively affected floral development, causing uneven flowering in orchards. This led to fewer pears per tree, with varying sizes and ripeness. A cold wave in mid-April in Poland resulted in frost damage to flower buds and fruit in many regions. In late May, intense hail and strong winds caused further damage. In mid-September, the heavy rainfall in central Europe caused rivers to overflow, affecting large parts of Austria, Czechia, Hungary, Romania, and Slovakia, and there are reports that pear orchards in these countries have been flooded.

Uncertain climatic conditions, during this year's growing season, associated with hailstorms, an unusual number of wet days and high temperatures, resulted in an increase in diseases and pests. In Belgium for instance, it resulted in a large-scale *Pseudomonas* infestation, which led to reduced fruit count and more pears being discarded due to visible damage or malformation. The fungal disease *Alternaria Alternata* is

causing black spots on the *Abate Fetel* variety in Italy. The warmer winter in Portugal allowed pests to thrive early in the season, and diseases like *fire blight* and *pear stenphylliosis*, caused trouble for pear growers. In Poland, weather patterns were highly variable, and rainfall promoted fungal diseases and fruit mold.

Pear growers also face increasing production costs for labor, transportation, and inputs. Growers report higher costs associated with protecting orchards from climate-related adverse weather conditions and protecting fruit against diseases and pests. At the same time farmers report increasing difficulties with and limitations on pesticide use.

Table 6: EU Commercial Pears Production by Country and Year in MT

	MY 2022/23	MY 2023/24	MY 2024/25e	Change MY2022/23 to MY 2023/24	Share of Total EU Production in 2024
Italy	505,000	184,000	405,000	120%	23%
the Netherlands	352,000	358,000	327,000	-9%	18%
Belgium	336,000	370,000	275,000	-26%	15%
Spain	248,970	297,710	242,510	-19%	14%
France	142,600	128,500	135,700	6%	8%
Portugal	132,280	118,580	130,450	10%	7%
Poland	95,000	98,000	90,000	-8%	5%
Greece	81,000	67,000	80,000	19%	4%
Germany	36,320	37,790	38,000	1%	2%
Romania	20,000	19,500	18,500	-5%	1%
Other	52,752	46,511	40,280	-13%	2%
Total Production	**2,001,922**	**1,725,591**	**1,782,440**	**3%**	

e = estimated; Source: FAS EU posts

Member State Specific Production Information

- The Emilia-Romagna region continues to be Italy's main pear producing area and *Abate Fetel* is the dominant variety. For many years, Italy's harvested area for pears has decreased due to lower profitability. Pear growers have had harvests that fluctuate strongly from year to year and have seen costs go up. Although Italy's pear production is forecast to significantly increase from the last season, it is not forecast to reach its full production potential, due to *Alternaria Alternata* outbreaks. The quality of the harvested pears is expected to be excellent, with larger calibers.
- There are more than 1,100 companies in the Netherlands that grow pears, with an average farm size of 8.7 hectares. Total acreage harvested is estimated at 9,930. The *Conference* variety dominates, making up more than three-quarters of the pear harvest. There continues to be a growing interest among growers to start producing club varieties like *Sweet Sensation*, *Migo*, and *Xenia*. Given the high number of cold and record number of wet days, the growing season was challenging, resulting in fewer fruits per tree this year. The weather conditions only improved

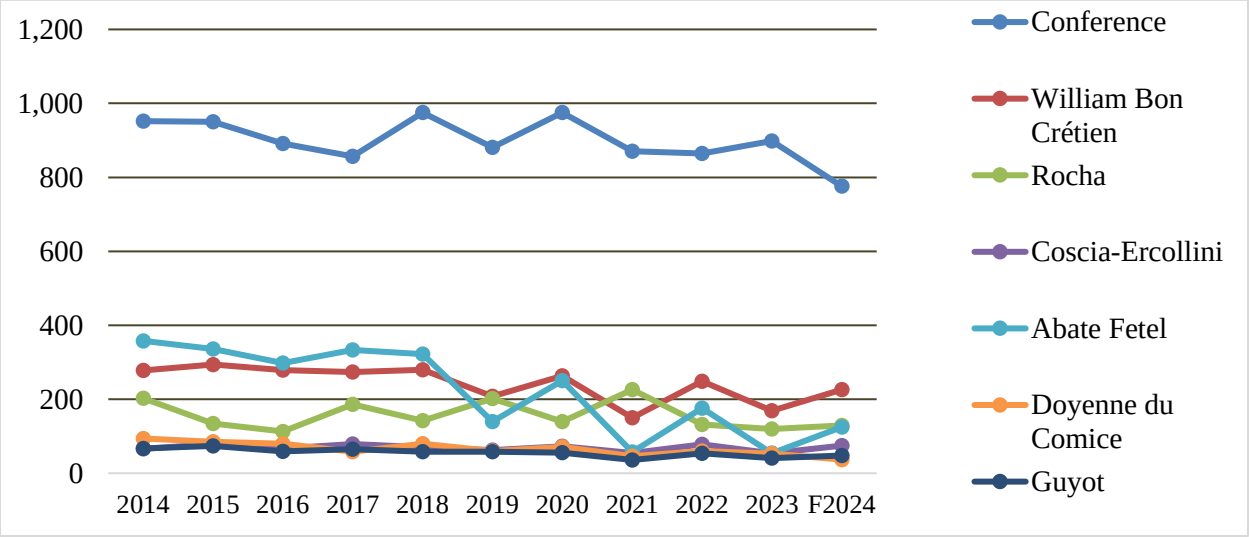
starting in July, resulting in a catch-up in terms of fruit size. The taste, color, and storing quality of this year's pears is expected to be good.

- Belgium's pear harvest is estimated to be the lowest harvest in the past ten years and more than 25 percent lower than compared to last year. While the growing season started out well with an abundance of flower buds, it worsened dramatically after reports of hailstorms followed by frost in the second half of April. The hailstorms damaged both trees and pears. The damaged pears, in combination with wet conditions, provided an excellent basis for the widespread outbreak of *pseudomonas*. Young trees were particularly impacted as they are more susceptible to both physical damage and bacterial activity. *Pseudomonas* causes black spots on the leaves and fruit, which led to affected pears falling from the tree. According to local sources, this year's outbreak was more severe than any in recent history. The extreme weather events made it much harder to control the spread of *pseudomonas* and protect yields. The severity of the *pseudomonas* infection varies from plot to plot and region to region, and on unaffected orchards harvested pears appear to be both large and high-quality.
- The harvested area for pears in Spain is expected to stay the same in 2024. However, commercial pear production is forecast to drop by 15 percent compared to last year as high temperatures have prevented proper flower formation, particularly in the *Conference* and *William* varieties, leading to fewer pears per tree and smaller fruit sizes.
- The French pear crop is set to grow by 11 percent in 2024 compared to last year and by 14 percent compared to the five-year average. Thanks to favorable weather – especially in Provence, the key growing region – good rainfall facilitated above-average pear growth, although it did lead to a rise in pests. Growers report they did not see much fruit drop. Harvested areas are expanding slightly, particularly in the Loire Valley, where local demand is driving growth.
- While pear production in Portugal is expected to increase by 10 percent compared to the previous year, production remains below historical levels. Many regions experienced temperature swings and occasional dry spells. A mild winter, with fewer cold hours, affected floral development, causing uneven flowering in orchards. This led to fewer pears per tree, with varying sizes and ripeness. Fortunately, rainfall in late August helped boost productivity, but yields could still differ depending on local weather conditions.
- In Poland, the *Conference* variety dominates commercial pear production. The area planted increased by 200 ha to 5,800 ha in 2024. In recent years, pear orchards have expanded as many apple trees were replaced by intensive pear varieties for fresh consumption. Investments in pear production aim to meet export demands and modernize orchards by eliminating older, less productive trees. Warmer temperatures early in the year led to fruit trees blooming two to three weeks earlier than usual. However, a cold wave in mid-April resulted in frost damage to flower buds and fruit in many regions. In late May, intense hail and strong winds caused further damage. Weather patterns during the growing season were highly variable. Rainfall promoted fungal diseases and fruit mold, while some areas experienced drought, leading to smaller, lower-quality fruit. In 2024, pest and disease pressure increased, and yields varied widely due to

diverse weather conditions. In mid-September, central Europe experienced heavy rainfall, leading to widespread flooding and disruption across several regions. The intense downpours caused rivers to overflow and in southwestern Poland, pear orchard areas were flooded, cutting off access to the fields. Eastern Poland on the other hand experienced a drought. In eastern and central Poland, the main problem is finding workers to harvest the fruit, exacerbated by the earlier start of the pear harvest.

- Greece's pear production is forecast to rebound from the previous low-production year mainly due to favourable weather conditions in spring that allowed normal fruit set in all varieties. Fruit quality is expected to be very good, with satisfactory sizes and sugar content. There are approximately 5,500 hectares in Greece currently cultivated for pears.

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



F = forecast, Source: WAPA data

Despite lower production numbers for *Conference* pears, the variety remains the most commonly grown in the EU, accounting for 43 percent of all pears grown in the EU in MY 2024/25, with production mainly centered in the Netherlands, Belgium, and Spain. Other popular varieties include *William Bon Crétien/*Bartlett (grown in Italy, Spain, and France) and *Rocha* (Portugal), followed by *Abate Fetel* (Italy), *Coscia-Ercollini* (Italy and Spain), *Guyot* (France and Spain), and *Doyenne du Comice* (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, Celina/QTee*, *Migo*, and *Sweet Sensation*. The production of these varieties, whose patent, trademark, and marketing are protected, is expected to total 59,000 MT in MY 2024/25, and is expected to further increase in 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 (for both fresh consumption and processing). Austria, Romania, and Czechia have non-commercial production volumes which account for 50 percent or more of total pear production in their countries. MY2024/25's EU non-commercial volume (85,900 MT) is somewhat higher compared to the previous MY, which is mostly due to higher production in Austria. Austria and Romania alone account for more than 70 percent of non-commercial production.

Pears - Consumption

Overall MY 2024/25 consumption is anticipated to increase slightly year-on-year, largely due to marginal increases in domestic production.

The most popular pear varieties are often those that are grown regionally. A lower crop of a specific variety likely results in lower consumption of that variety in a market. Shifts in availability for specific varieties in consumers markets are often driven by commercial production numbers of these varieties. In MY 2024/25, more *William Bon Crétien*, *Abate Fetel*, and *Coscia-Ercollini* will likely be available on the local market while *Conference* availability will decline. The average per-capita consumption of pears in the EU is estimated between three and four kilograms per year with high per-capita consumption of pears often in countries that have a large domestic pear production. The lowest per-capita consumption markets in the EU, at two kilograms per year or less, include among others Hungary and Slovakia.

WAPA reports that pears rank as the 10th most popular fruit and an estimated 8 percent of the EU population eats a pear almost every day. Like apples, most pears are eaten at home, typically as an afternoon snack, and are bought at local food retailers, fresh produce specialty shops, or street markets. There are many reasons why consumers eat fresh pears, including its health benefits, freshness, taste, and texture.

Over the long run, however, pear consumption is experiencing downward pressure. Generation Z and millennials, who already eat the least amount of fruit, are gravitating towards other snack products like confectionery products, biscuits, and flavored drinks. The hassle of peeling or cutting fresh fruit, combined with perceived inconvenience in consuming it, are commonly cited as reasons for this shift. Another factor is price, and higher costs of living are pushing consumers towards lower priced and further processed food options, often at the expense of fresh fruit.

More affluent consumers on the other hand are developing an appetite for more exotic and luxurious fruit like berries, pineapple, mango, and melon, often at the expense of traditional fruits. There is also increasing demand for fruit to be a convenient food product. Many food retailers are responding to this by offering single serving fruit salads that can be used at home or on-the-go. Consumers are also increasingly demanding high-quality pears and club varieties are becoming more popular.

Pears – Processing

Most professional growers 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 this market. These pears can be used for baking, juice, and canning. Pears not suitable for human consumption might end up in animal feed or be used for fermentation. Relative pricing for fresh pears at the farm level can also influence the volume used for processing. In MY 2024/25, processing volumes are estimated at almost 245,000 MT of which more than 40 percent are pears produced in Italy, where pears are bought by the local juice industry. Austria expects to process 41,000 MT of pears to produce Perry (or pear cider), an alcoholic beverage made from fermented pears. Processing volumes in France and Spain are expected to total 22,000 MT and 21,000 MT, respectively. In Spain, they are processed into fruit jelly and used by the canning industry.

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 new phytosanitary certification obligations and physical checks which have been postponed to July 2025.

Pear – Imports
Imported pears represent 9 percent of total EU pear supply, and traditionally end up in the EU's fresh market. Popular imported varieties include *Packham*, *Abate Fetel*, *Forelle*, and *Williams/Bon Crétien*.

In MY 2024/25, EU pear imports are forecast to be a bit lower due to a slightly higher domestic commercial production. There could be less sales opportunities for *Conference* pears on the German market due to a better harvest of *Abate Fetel* in Italy. EU imports were up by 30 percent in MY 2023/24 compared to MY 2022/23 due to a lower EU commercial pear production that year. The Netherlands and Italy together accounted for 70 percent of the EU's pear imports in MY 2023/24. Most of the volume entering the port of Rotterdam in the Netherlands continues to be shipped to other member states, in particular Germany. Most of Italy's, as well as Portugal's, imports stayed on the local market due to its low local commercial production last year.

The EU predominantly imports pears from Southern Hemisphere countries. 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 July.

Turkey continues to be the EU's fourth largest supplier of pears and Romania, Austria, and Bulgaria dominate these imports. These pears are often re-exported to markets outside the EU. 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. Imports of pears from the United States are currently non-existent due to the EU's strict maximum residue levels (MRL) for pesticides.

Table 7: EU Pear Imports in MT

Country of Origin	MY 2021/22	MY 2022/23	MY 2023/24	MY 2022/23 to MY 2023/24	Share of Total Imports in MY 2023/24
South Africa	75,147	55,087	82,173	+49%	45%
Chile	41,804	34,594	38,029	+10%	21%
Argentina	37,668	24,528	32,249	+31%	18%
Türkiye	16,926	12,670	13,935	+10%	8%
China	8,823	8,286	10,960	+32%	6%
Serbia	3,371	3,003	2,978	-1%	2%
Bosnia & Herzegovina	264	908	776	-15%	0%
United Kingdom	836	483	544	+13%	0%
Other	1,364	660	602	-9%	0%
Total	**186,203**	**140,219**	**182,246**	**+30%**	

Sources: Trade Data Monitoring (TDM) accessed in September 2024

Pear - Exports

In MY 2024/25, EU pear exports are forecast to remain low mainly due to the record low *Conference* crop. 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 294,069 MT in MY 2023/24. 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 2023/24, exports were down by 16% compared to the year before, due to lower local commercial production last year.

The UK and Belarus have been taking turns as the largest export market for European pears for a few years now. In MY 2023/24, Belarus was the second largest export market after the UK. Kazakhstan, and other countries that have proximity to Russia like Azerbaijan, are also important markets for Dutch and Belgian *Conference* pears. EU pear exports to former Soviet Republics are expected to remain the same.

EU exports to the UK have fluctuated between 100,000 and 110,000 MT for many years but dropped to 98,000 MT and 81,000 MT in MY 2022/23 and MY 2023/24, respectively. EU pear exports to the UK are expected to stay at this level in MY 2024/25 as well as exports to other mature consumer markets in Europe, such as Norway and Switzerland.

Rocha pears are popular in Brazil. Export figures of this pear variety are closely related to production figures in Portugal. Despite a lower anticipated harvest, Portuguese pear production continues to be higher than consumption, making Portugal a net exporter.

For the past five years, EU pear exports to China and Hong Kong combined have gradually declined by over 40 percent to 5,700 MT in MY 2023/24. For MY 2024/25, no major changes to this combined market are expected.

Table 8: EU Export of Pears in MT

Country of Destination	MY 2021/22	MY 2022/23	MY 2023/24	MY 2022/23 to MY 2023/24	Share of Total Exports in MY 2023/24
United Kingdom	103,328	98,363	81,421	-17%	28%
Belarus	77,289	108,101	72,536	-33%	25%
Morocco	47,278	34,337	26,625	-22%	9%
Kazakhstan	15,052	14,970	26,149	+75%	9%
Brazil	27,376	21,085	22,467	+7%	8%
Norway	12,940	11,537	14,353	+24%	5%
Switzerland	9,059	8,015	9,687	+21%	3%
China	5,205	6,086	4,903	-19%	2%
Saudi Arabia	3,895	2,746	3,499	+27%	1%
Libya	6,504	4,658	3,176	-32%	1%
Serbia	2,518	2,460	3,091	+26%	1%
Ukraine	4,724	4,604	2,872	-38%	1%
Albania	2,283	1,843	2,756	+50%	1%
Bosnia and Herzegovina	2,434	3,247	2,402	-26%	1%
Israel	2,749	2,471	1,825	-26%	1%
United Arab Emirates	2,039	1,581	1,765	+12%	1%
Azerbaijan	1,949	1,887	1,714	-9%	1%
Canada	2,280	1,603	1,536	-4%	1%
Russia	6,344	1,694	1,477	-13%	1%
Other	13,531	17,024	9,815	-42%	3%
Total	**348,777**	**348,312**	**294,069**	**-16%**	

Sources: Trade Data Monitoring (TDM) accessed in September 2024

European pear traders are still focused on hedging against risk, especially with current geopolitical challenges, costly international shipping, Brexit, and the ongoing conflict in Ukraine. While supplying reliable and nearby markets remains key, they are also on the lookout for opportunities in more distant regions. However, building new, sustainable markets – especially for pear varieties unfamiliar to these consumers – will take time and effort, likely spanning several years.

Pear – Prices

MY 2024/25 has the third-smallest harvest in the past decade and the overall quality of the harvested pears is good. Producer prices for early variety pears started at a lower price than last year but better prices for pears could be expected later in the season, possibly due to a lower supply of overseas pears. Production costs remain high.

Pear – 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 9: Production, Supply, and Distribution – Tables Grapes

Grapes, Fresh Table	2022/2023		2023/2024		2024/2025	
Market Year Begins	Jun 2022		Jun 2023		Jun 2024	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	96,636	96,606	96,633	96,559		96,690
Area Harvested (HA)	92,968	93,038	92,748	93,229		92,750
Commercial Production (MT)	1,540,483	1,538,340	1,292,300	1,306,909		1,086,580
Non-Comm. Production (MT)	5,100	5,110	5,800	4,027		3,450
Production (MT)	1,545,583	1,543,450	1,928,100	1,310,936		1,090,030
Imports (MT)	573,500	573,543	630,000	599,314		630,000
Total Supply (MT)	2,119,083	2,116,993	1,928,100	1,910,250		1,720,030
Fresh Dom. Consumption (MT)	1,947,583	1,945,482	1,768,100	1,783,777		1,604,030
Exports (MT)	171,500	171,511	160,000	126,473		116,000
Withdrawal From Market (MT)	0	0	0	0		0
Total Distribution (MT)	2,119,083	2,116,993	1,928,100	1,910,250		1,720,030
(HA), (MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Not official USDA data. Sources: Trade for MY 2022/23 and 2023/24: Trade Data Monitoring, LLC (TDM) accessed in September 2024; 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 91 percent of the EU's total production. In MY 2024/25 (June/May), commercial EU table grape production is forecast down from the previous season. This is primarily due to lower harvests in Italy (due to temperature swings, heavy rains, and humidity during flowering in May and June) and Greece (due to summer drought in the prefectures of Corinth and the Peloponnese). Production decreases are also forecast in France, Romania, Portugal, and Bulgaria due to unfavorable weather. Conversely, increased volumes are forecast in Spain. Overall, fruit quality is forecast to be excellent with higher sugar content due to hot temperatures from June to September. MY 2024/25 EU table grape harvested area is forecast to remain flat with new seedless varieties entering 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 10: EU Commercial Table Grape Production by Country and Year in MT

COUNTRY	MY 2022/23	MY 2023/24	MY 2024/25e	Change 2024:2023	Share of Total EU Production in 2024
Italy	864,000	604,800	**425,000**	-30%	39%
Spain	292,390	355,419	**365,874**	2.9 %	34%
Greece	270,000	260,000	**200,000**	-23%	18%
France	45,700	41,700	**35,000**	-16%	3.2%
Romania	38,000	36,500	**34,000**	-6.9%	3.1%
Portugal	15,507	16,890	**15,209**	-10%	1.4%
Bulgaria	12,743	11,600	**11,500**	-0.9%	1.1%
Total	**1,538,340**	**1,306,909**	**1,086,583**	**-16.9%**	**100%**

e= estimated; due to rounding percentages add up to marginally less than 100 percent.
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 2024/25 non-commercial EU table grape production is forecast to decrease by approximately 14.3 percent compared to the previous season due to lower volumes in Romania (-16.3 percent) and Bulgaria (-6.3 percent) due to unfavorable weather.

Table Grapes – Consumption

In MY 2024/25, EU fresh grape consumption is forecast down from the previous season, mainly due to lower Italian production. Fresh grapes are increasingly perceived as a tasty and healthy snack. Consumption is mostly sourced from domestic producers, with imports normally supplying consumers in the first half of the calendar year. Imports from third countries represent approximately 34 percent of total consumption and are mostly provided by Southern Hemisphere countries.

Germany, Spain, Italy, Greece, and France are forecast to remain the leading table grape consumers in the EU, followed by Romania, Portugal, Czechia, 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 2024/25 EU table grape imports are forecast to increase 5 percent due to decreased domestic production. During MY 2023/24, EU table grape imports increased by approximately 4 percent from the previous season, driven by decreased domestic production. The largest EU importing countries remain the Netherlands and Germany. These are followed by Poland, France, Spain, Romania, Czechia, Belgium, Austria, Portugal, Slovenia, Sweden, Italy, Ireland, Denmark, Slovakia, Hungary, Croatia Finland, Latvia, Lithuania, Bulgaria, Estonia, Cyprus, Luxemburg, Greece, and Malta. The Netherlands serves mainly as a trans-shipping point. EU table grape imports from the United States are rare.

Table 11: EU Imports of Table Grapes in MT

Country of Origin	MY 2021/22	MY 2022/23	MY 2023/24	Change MY2022/23 to MY2023/24	Share of Total Imports in MY 2023/24
South Africa	188,263	153,966	**179,141**	16%	30%
India	87,239	86,060	**101,978**	19%	17%
Peru	98,871	103,726	**81,700**	-21%	13%
Egypt	42,662	52,729	**65,079**	23%	11%
Chile	63,303	68,279	**46,037**	-33%	8%
Moldova	19,654	23,241	**42,616**	83%	7%
Brazil	33,901	25,142	**26,610**	6 %	4%
Turkey	32,708	22,844	**24,620**	8%	4%
Namibia	21,687	24,973	**22,466**	-10%	4%
Morocco	5,691	5,030	**4,220**	-16%	1%
United States	**0**	**0**	**2**	**628%**	**0%**
Other	9,751	7,553	**4,845**	-36%	1%
Total	**603,730**	**573,543**	**599,314**	**4%**	**100%**

Source: Trade Data Monitor, LLC (TDM) accessed in September 2024
Due to rounding percentages add up to marginally more than 100 percent.

Table Grapes - Exports

MY 2024/25 EU table grape exports are forecast down 8 percent due to a reduction in production and rising costs associated with freight, logistics, and transportation, which have been further exacerbated by the ongoing conflict in Ukraine. During MY 2023/24, EU table grape exports declined in comparison to the previous season, reflecting lower production. Seedless varieties are mainly sent to the UK and the UAE. EU table grape exports to the United States are marginal.

Table 12: EU Exports of Table Grapes in MT

Country of Origin	MY 2021/22	MY 2022/23	MY 2023/24	Change MY2022/23 to MY2023/24	Share of Total Imports in MY 2023/24
United Kingdom	92,380	86,063	**51,335**	-40%	41%
Switzerland	27,363	26,645	**25,944**	-3%	21%
Norway	16,712	15,787	**14,102**	-11%	11%
Russia	4,809	11,358	**7,548**	-34%	6%
Albania	1,798	1,978	**2,931**	48%	2%
South Africa	3,671	2,759	**2,659**	-4%	2%
Belarus	1,330	1,873	**2,554**	36%	2%
Ukraine	2,206	3,655	**2,136**	-42%	2%
Bosnia & Herzegovina	2,925	2,697	**2,117**	-22%	2%
Saudi Arabia	3,267	1,515	**1,596**	5%	1%
United States	**724**	**795**	**624**	**-21%**	**0**
Other	15,309	16,386	**12,927**	-21%	10%
Total	**172,494**	**171,511**	**126,473**	**-26%**	**100%**

Data source: Trade Data Monitor, LLC (TDM) accessed in September 2024; 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.

Section IV: Policy

Common Agricultural Policy Reform

The new EU Common Agricultural Policy (CAP) for 2023-2027 was adopted on December 2, 2021, and published in the Official Journal on December 6, 2021. As part of this process, EU Member States were requested to submit so-called Strategic Plans, incorporating MS specific goals and initiatives, by the end of 2021. By December 2022, all national strategic plans were approved by the European Commission. The 'new' CAP entered implementation January 1, 2023.

In March 2024, following weeks of farmer protests across the European Union demanding less administrative burdens and better prices, the European Commission published a legislative proposal to amend certain provisions of the Common Agricultural Policy (CAP). The Commission acknowledged that the first year of implementation of the current CAP made clear that adjustments are necessary to ensure effective implementation of the National Strategic Plans and reduce red tape. Updates to the CAP were adopted in May 2024 and published as Regulation 2024/1468. Notably, the updated CAP exempts farms of under 10 hectares from controls and penalties related to compliance with "good agricultural and environmental conditions" (GAEC) requirements. This was a request from farmers to reduce red tape and administrative burden. For more information, please see GAIN Report: EU Commission Proposes Common Agricultural Policy Revision s Following Farmer Protests.

Marketing Standards

Fresh fruit and vegetable imports into the EU must comply with EU-harmonized marketing standards. These standards apply at all marketing stages and include criteria such as quality, size, labeling, packaging, and presentation.

EU marketing standards were revised in August 2023. Implementing Regulation (EU) 2023/2430 and Delegated Regulation 2023/2429 provide for a general marketing standard for all fresh fruits and vegetables. Specific marketing standards are in place for apples, pears, and table grapes and are set out in Delegated Regulation 2023/2429:

- Apples: pages 12-29
- Pears: pages 49-56
- Table Grapes: pages 63-66

European School Fruit, Vegetables and Milk Scheme and Promotion Programs

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. Commission Implementing Decision (EU) 2024/845 allocates $143 million (€130 million) of EU funds for fruits and vegetables for the 2024/2025 school year 2023/2024 for all Member States. It applies from August 1, 2024.

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. EU promotion programs have been available to EU farmers through a range of provisions in the Common Agricultural Policy since 2001. Current programs are regulated by Regulation (EU) 1144/2014. A key element of the EU's promotion policy called "Enjoy! It's from Europe" is the adoption of annual work programs that set out strategic priorities for promotion measures in terms of products, schemes, target markets, and available resources. The objective is to adapt the program each year to emerging market opportunities and the needs of certain sectors. In 2024, €18 million out of a total budget of €185.9 million were set aside for the promotion of EU fresh fruit and vegetables in the EU and in third countries. For more information, please see GAIN Report EU 2024 Promotion Programs for Agricultural Products.

EU Policy Response to the War in Ukraine

In February 2022, Russia launched an unjustified invasion of Ukraine, which continues to put pressure on global food security as both countries are major exporters of agrifood products. products. In 2022-2023, the fruits sector was impacted by increased input prices including energy, fertilizers, and pesticides but prices have since stabilized.

The EU has granted Ukraine full trade liberalization, suspending import duties, quotas, and trade defense measures for imports from Ukraine on a temporary basis through the Autonomous Trade Measures (ATM) Regulation. These measures first entered into force on June 04, 2022, and were renewed for subsequent years in June 2023 and June 2024. The current measures will remain in force for fruit until June 05, 2025.

Maximum Residue Levels (MRLs) – Upcoming reviews

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

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 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 2024 and 2025 are published in Commission Implementing Regulation (EU) 2023/2364.and Commission Implementing Regulation (EU) 2024/2522, respectively. They apply as of January 01, 2024, and January 1, 2025. The tariffs for fresh deciduous fruits can be found:

Apples: see pages 108 and 756 (2024) / 108 and 761 (2025)
Apple Juice: see pages 181 (both years)
Pears: see pages 108 and 758 (2024) / 108 and 763 (2025)
Grapes: see pages 108 and 756 (2024) / 108 and 760 (2025)

First Come, First Served Principle: Regarding the administration of import tariff quotas, certain types of 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 (pears in bold)	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 %

Free Trade Agreements 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 including major EU fresh deciduous fruit partners such as Chile, South Africa, the UK, New Zealand, and Argentina. These FTAs include concessions on food products. Additional information is available on the website of the EC at: EU Trade agreements (europa.eu).

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 plant pests 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.

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 stone fruits, 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 continued to extend the ban every year. The Commission introduced specific market support measures for the European fruit and vegetable sector from the start of the ban in 2014 until 2017. The emergency measures for fruit and vegetables were phased out on June 30, 2018. Overall, the EU granted $588 million (€500 million) of aid to EU producers of fruit and vegetables corresponding to 1.7 million tons of withdrawals from the market.

Belarussian Import Ban

Belarus banned the import of certain fruit and vegetables, including apples and pears from some EU countries at the beginning of 2022. Belarus initially declared a six-month embargo on a broad range of Western foods, but the ban has been repeatedly extended. It has now been extended until December 31, 2024.

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.

Following the UK General Election in July 2024, the decision was made to extend the easement of import checks on medium-risk fruit and vegetables imported from the EU to July 1, 2025. Such products will not be subject to import checks at the Great Britain (GB)[7] border or charged the associated fees until this date. This easement is described as a temporary measure to ensure that new ministers have a full and thorough opportunity to review the planned implementation of further border controls, and an opportunity to listen to businesses across import supply chains. Seven commodity groups, including apples and pears, have also been recategorized from medium risk to low risk, allowing these goods to move freely into GB from the EU.

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 The United States is present with a country pavilion	Next Fair: February 5-7, 2025
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 United States is present with a country pavilion	Next Fair: February 11-14, 2025

[7] Great Britain includes England, Scotland, and Wales (not Northern Ireland).

FRUIT ATTRACTION Madrid, Spain (Interval: yearly) https://www.ifema.es/en/fruit-attraction	Next Fair: September 30 - October 2, 2025

Section VI: Related Reports

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

Prognosfruit 2024 - EU Production Down for Apples Up for Pears | GM2024-0008Berlin | Germany | Published On: September 05, 2024 Prognosfruit 2024 - EU Production Down for Apples Up for Pears_Berlin_Germany_GM2024-0008
Fewer Fruits per Tree Due To Unfavorable Growing Conditions | NL2024-0013The Hague | Netherlands | Published On: August 23, 2024 Fewer Fruits per Tree Due To Unfavorable Growing Conditions _The Hague_Netherlands_NL2024-0013
Fresh Deciduous Fruit Annual | E42023-0045Berlin | European Union | Published On: November 01, 2023 Fresh Deciduous Fruit Annual_Berlin_European Union_E42023-0045
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
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