

Voluntary Report – Voluntary - Public Distribution

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Report Name: Prognosfruit 2025 - EU Production Stable for Apples Up for Pears

Country: European Union

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Report Category: Fresh Deciduous Fruit

Prepared By: Sabine Lieberz

Approved By: Matthew Snyder

Report Highlights:

On August 6-8, 2025, the World Apple and Pear Association (WAPA) presented the 2025 EU apple and pear crop forecast at the Prognosfruit convention. WAPA forecasts the 2025 EU fresh apple crop at 10.5 million metric tons (MT), only 0.1 percent below the 2024 harvest. Production of fresh pears is forecast at 1.79 million MT or a 1.4 percent increase compared to production in 2024. This forecast reflects the situation as of mid-July. During the event the sector voiced its concerns regarding future EU common market policy.

Prognosfruit is the annual European crop forecast colloquium for apples, pears, and concentrated apple juice (CAJ). Prognosfruit 2025 attracted participants from 23 countries and five continents, including representatives from the United States, Moldova, and China. It was held in Angers/France on August 6-8, 2025. This report summarizes the major findings of Prognosfruit and does not reflect FAS forecasts or views.



Philippe Binard and Gil Kaufmann from WAPA presented the apple and pear forecast, while Ursula Schockemoehle and Eva Wuertenberger from *Agrarmarkt Informations-Gesellschaft mbH* (AMI), Germany, reported on the market outlook for MY 2025/26. Gerhard Eberhoefer, board member of the *European Biofruit Forum* (EBF) reported on the situation for organic fruits.



Their presentations were followed by a roundtable discussion with representatives from Spain, Belgium, France, Italy, The Netherlands, and Poland,

Additional presentations not covered in this report focused on the market situation for apples and pears in neighboring European markets (Moldova, Ukraine) and in markets further afield (United States, Turkey, Caucasus, and China) as well as on the processing sector, consumption trends, and environmental sustainability. All forecasts are based on information available in mid-July.

Prognosfruit 2026 is planned for August 5-7, 2026, in Konstanz, Germany, and will mark the 50-year anniversary of the event that was first held in Bavendorf, Germany, in 1976.

Abbreviations:

CAJ	= Concentrated Apple Juice
EU	= European Union
MT	= metric ton(s)
WAPA	= <u>WAPA - The World Apple and Pear Association</u>

Major Concerns of the Sector

While the harvest forecast is the core element of the event, several speakers used the opportunity to voice their concerns regarding the future of the sector. Points raised included:

- The decreasing availability of plant protection products and lack of alternatives to combat pests and diseases threatens production, especially as new pests and diseases reach Europe because of changing climatic conditions.
- The EU is in the process of formulating the framework of the common agricultural policy (CAP) for the period after 2027. The sector is concerned about the proposed decentralization of core aspects of the CAP and fear that it will result in different rules in the various member states. Instead, they ask for a simplification and less bureaucracy.
- The future of the EU financial framework for 2028-2034 and a potential budget reduction is another area of concern.

Forecast for Apples Production in the EU

WAPA forecasts the apple crop of 20 reporting EU member states in 2025 at 10.5 million MT.¹ This represents a 0.1 percent decrease compared to the 2024 harvest but 8 percent below the average of the preceding ten years. If materialized, it would be the second smallest crop of the last ten years. The forecast number includes 605,000 MT of organic apples.

Major Points on EU production:

- Over the past decade, EU apple acreage has declined, 2025 data is not yet available.
- Yields are decreasing. Reasons for this include limited access to plant protection products; higher incidence of weather-related problems (droughts, late frosts, flooding), and a higher share of lower yielding organic production.
- The top five apple-producing member states in 2024 are Poland, Italy, France, Germany, and Spain with 32, 22, 14, 10, and 5 percent of EU production, respectively, together accounting for 83 percent of production.
- Participants cited climate change as increasingly impacting EU production. Mild winters lead to earlier blossoming, which increases the threat of late frosts. Additionally, the frequency of droughts and floods increased.
- This year late frosts mainly affected the Baltics (Estonia, Latvia, Lithuania) and the Eastern parts of Bulgaria and Romania.
- In contrast, Austrian, German, and Czech production rebounded from the frost-induced losses in the previous year.

¹ This forecast only pertains to the 20 counties that participate in WAPA. Apple production also exists in Bulgaria, Cyprus, Estonia, Finland, Ireland, and Luxemburg. According to Eurostat their combined production amounted to roughly 80,000 MT in recent years. Malta does not have commercial apple production.

- Polish production could turn out higher than forecast as rain may increase fruit size.
- Organic production is forecast to marginally increase by 0.44 percent to 605,000 MT compared to 602,000 MT in 2024.

Major Points on Market Conditions:

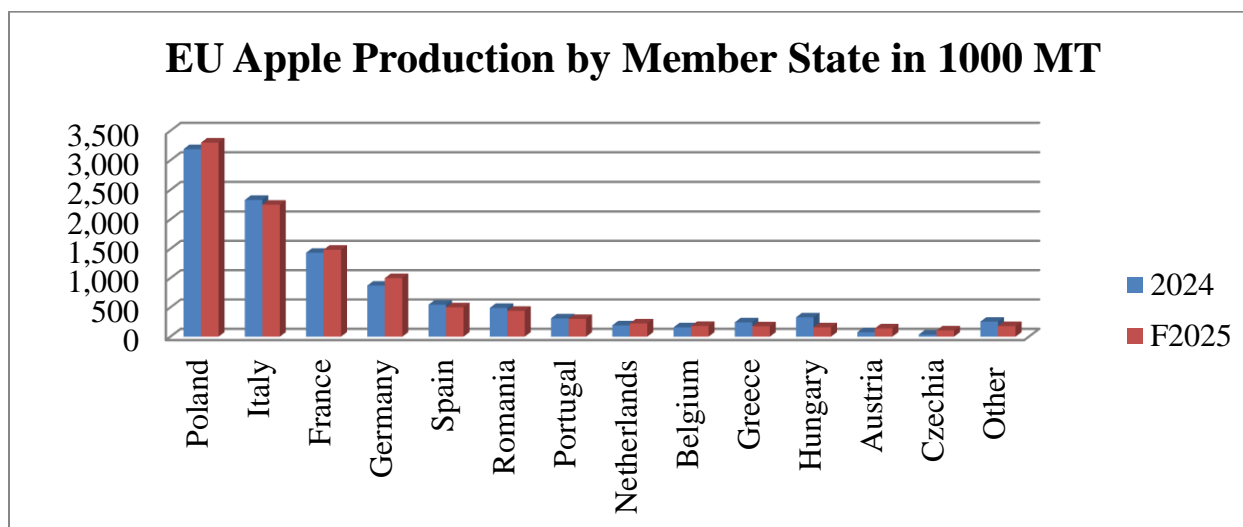
- Market conditions vary throughout the EU, depending on the apple variety and country.
- Positive factors:
 - Stocks of concentrated apple juice (CAJ) are extremely low and competition for processing apples is strong. As a result, the processing sector will likely absorb apples with a lower shelf-life, which will eliminate pressure from the table apple market.
 - End of the marketing year apple stocks are significantly lower (minus 21 percent) than in the previous season.
 - Non-commercial backyard production in Germany is expected to be at an average level (450,000 MT) and thus should not put pressure on the market.
 - EU exports could benefit from lower production in Türkiye and Moldova and thus lower competition in the Middle East and Northern Africa.
 - South America remains an attractive market as stocks in Argentina are lower than in 2024.
- Negative factors:
 - Lower expected EU consumption, especially as young people move from apples to “superfoods” such as berries, avocado, etc.
 - Exports to South America are expected to further decline as trade within this continent increases.
 - High production costs, lack of availability of sufficient plant protection.
 - High costs for energy and logistics.
 - Houthi attacks on commercial ships in the Red Sea continue to disrupt exports to east Asia.

Table 1: EU Apple Production by Country (1000 MT)

Country	2020	2021	2022	2023	2024	2025 f	% 2025 versus 2024	% 2025/ Average 22-24
Poland	3,410	4,300	4,495	3,970	3,190	3,300	3%	-15%
Italy	2,124	2,053	2,113	2,175	2,329	2,248	-3%	2%
France	1,337	1,383	1,391	1,508	1,432	1,484	4%	3%
Germany	1,023	1,005	1,072	941	872	1,000	15%	4%
Spain	425	563	412	518	546	501	-8%	2%
Romania	537	594	543	534	491	442	-10%	-15%
Portugal	278	368	291	295	313	303	-3%	1%
Netherlands	220	243	235	199	194	226	16%	8%
Belgium	168	250	239	203	160	183	14%	-9%
Greece	208	246	321	183	245	178	-27%	-29%
Hungary	350	520	280	550	330	160	-52%	-59%
Austria	126	120	151	116	75	142	89%	25%
Czechia	118	110	138	101	36	107	197%	17%
Other	250	234	256	222	256	181	-29%	-26%
Total	10,574	11,989	11,937	11,515	10,469	10,455	-0.1%	-7.5%

Source: WAPA, f = Forecast

Chart 1: EU Apple Production by Member State in 1000 MT



Source: FAS/Berlin based on WAPA data, F = Forecast

Table 2: EU Apple Production by Variety (1000 MT)

Variety	2020	2021	2022	2023	2024	2025 f	% 2025 versus 2024	% 2025/ Average 22-24
Golden Delicious	2,001	2,199	1,972	2,196	2,078	2,059	-1%	-1%
Gala	1,390	1,534	1,463	1,519	1,428	1,429	0%	-3%
Red Delicious	677	692	694	599	602	487	-19%	-23%
Idared	659	760	669	618	510	465	-9%	-22%
Red Jonaprince	441	471	579	470	350	390	11%	-16%
Shampion	423	465	454	422	355	379	7%	-8%
Granny Smith	365	347	410	338	356	347	-3%	-6%
Cripps Pink	273	256	319	318	321	334	4%	5%
Elstar	312	333	376	293	305	330	8%	2%
Jonagold	315	468	405	353	302	292	-3%	-17%
Fuji/Kiku	313	306	334	307	312	283	-9%	-11%
Pinova	162	195	207	207	192	211	10%	4%
Ligol	210	280	260	220	160	190	19%	-11%
Braeburn	221	205	202	189	166	173	4%	-7%
Jonagored	250	251	208	186	134	148	10%	-16%
Reinette Grise	136	141	151	157	154	142	-8%	-8%
Gloster	154	201	141	122	121	121	0%	-5%
Jonathan	118	104	121	133	116	100	-14%	-19%
Boskoop	46	61	84	50	45	54	20%	-9%
Morgenduft/ Imperatore	54	32	32	28	60	54	-10%	35%
Annurca	45	45	45	38	40	42	5%	2%
Cox Orange	17	16	14	9	10	10	0%	-9%
Other new varieties	309	340	497	658	594	680	14%	17%
Other	1,755	2,287	2,299	2,084	1,757	1,735	-1%	-15%
Total:	10,646	11,989	11,936	11,514	10,468	10,455	0%	-7.5%

f = forecast

Note: Category “Other new varieties” includes but is not limited to: Ariane, Belgica, Cameo®, Diwa®/Milwa, Greenstar®, Honey Crunch, Jazz™, Junami®, Kanzi®/Nicoter, Mariac, Rubens, Tentation®/Delblush, Wellant®

Source: WAPA

Table 3: Commercial Apple Stocks in Select Member States, UK, and Switzerland on July 1 (1000 MT)

Country	2024	2025	2025:2024
Italy	170,146	127,054	-25%
France	73,347	84,436	15%
Spain (Catalonia)	45,432	36,448	-20%
Poland	72,000	25,500	-65%
Germany	24,403	24,323	0%
The Netherlands	10,869	14,053	29%
Switzerland	4,545	12,737	180%
United Kingdom	899	6,327	604%
Austria (Steiermark)	15,872	5,042	-68%
Belgium	11,993	4,619	-61%
Total	429,506	340,538	-21%

Source: WAPA

Forecast for Pears

Production of fresh pears is forecast at 1.79 million MT², versus 1.76 million MT in 2024. This is a recovery of 1.4 percent compared to 2024 but still 13 percent below the average of the preceding ten years. If materialized, it would be the fourth smallest crop of the last ten years. The forecast number includes 90,000 MT of organic pears.

Major Points on EU Production:

- The decline in EU pear area has stabilized around 100,000 ha. In 2024, for the first time in ten years, the area has slightly increased. Data for 2025 is not yet available.
- In the last decade area has declined by about 20 percent but was partially compensated by higher yields.
- Production costs have increased by 30 percent compared to 2020.
- In 2025, production is significantly rebounding in Belgium (up 32 percent), Spain (up 10 percent) Netherlands (up 8 percent), and Germany (up 13 percent) compared to the 2024 harvest. The combined increase more than compensates for lower production in Italy, Greece, Hungary, Portugal, and Romania.

² This forecast only pertains to the 18 counties that participate in WAPA for pears. Pear production also exists in Austria, Bulgaria, Cyprus, Finland, and Luxemburg. According to Eurostat, their combined production has amounted to roughly 40,000 MT in recent years. Estonia, Ireland, Lithuania, and Malta do not have commercial pear production.

- In the variety mix, Conference defended its position as the primary variety with 48 percent of total pear production. Williams Christ/Bartlett is number two (11 percent) followed by Rocha (7 percent) and Abate Fetel (5 percent). New and club varieties (e.g., Xenia®, Qtee®, Migo®, Sweet Sensation®, Early Desire®, Fred®) are gaining market share (5 percent).

Major Points on Market Conditions:

- Except for the Netherlands, EU pear stocks are depleted. This should bode well for higher prices.
- No pressure from the Southern hemisphere.
- Lower availability of early varieties compared to 2024.
- Club varieties could benefit from lower *Abate Fetel* production.
- Pear consumption in the EU is declining, especially in Spain and Italy. Total EU pear consumption decreased by 28 percent from 2020 to 2024.
- Pears are most popular with retired couples and least with young singles. Over time this is expected to reduce the consumer base.

Table 4: EU pear production by country (1,000 MT)

Country	2020	2021	2022	2023	2024	2025 f	% 2025 versus 2024	% 2025/ Average 22-24
Belgium	393	356	346	381	269	355	32%	7%
Netherlands	400	340	352	358	322	348	8%	1%
Italy	611	202	505	184	400	302	-25%	-17%
Spain	307	309	236	286	223	246	10%	-1%
France	133	58	147	104	137	140	2%	8%
Portugal	139	225	132	112	125	121	-3%	-2%
Poland	65	70	95	100	100	110	10%	12%
Greece	80	67	99	61	71	57	-20%	-26%
Germany	39	37	36	38	39	44	13%	17%
Romania	47	50	42	42	39	35	-10%	-15%
Other	35	36	38	40	37	28	-24%	-27%
Total:	2,249	1,750	2,028	1,706	1,762	1,787	1.4%	-2.5%

f = forecast, Source: WAPA

Table 5: EU Pear Production by Variety (1000 MT)

Variety	2020	2021	2022	2023	2024	2025 f	% 2025 versus 2024	% 2025/ Average 22-24
Conference	975	871	865	898	742	857	15%	-2%
Williams BC/ Bartlett	263	150	249	169	226	188	-17%	-7%
Rocha	140	226	132	120	125	121	-3%	-3%
Abate Fetel	250	57	176	54	121	92	-24%	-14%
Coscia-Ercollini	73	55	78	54	74	64	-14%	-2%
Guyot	71	46	60	53	41	56	37%	-1%
Comice	56	36	54	41	49	47	-4%	-1%
Blanquilla	38	33	26	35	28	25	-11%	-13%
Kaiser	43	17	31	12	23	18	-22%	-11%
Other new varieties			60	70	70	94	36%	27%
Other	337	258	296	200	261	223	-15%	-12%
Total:	2,246	1,740	2,028	1,706	1,762	1,787	1.4%	-2.5%

f= forecast, Source: WAPA

Note: Category “Other new varieties” includes but is not limited to: Early Desire®, Migo®, QTee®/Celina. Red Conference, Sweet Sensation®, Xenia®

Attachments:

No Attachments.