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Report Highlights:

EU commercial apple and pear production in Marketing Year (MY) 2025/26 is forecast at 10.7 million metric tons (MMT) and 1.78 MMT, respectively. This is a marginal increase of 0.3 percent for apples and 1.7 percent for pears compared to the previous year. If materialized this would be the third-smallest production in the past decade for apples and the fourth-smallest for pears. EU commercial table grape production is forecast to recover from the very low level of the previous year, reaching 1.5 MMT.

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: The European Union Member States (MS) are mandated to annually provide the EU Commission with data concerning the "production area" of permanent crops. This means "the area that can potentially be harvested in the reference harvest year. It excludes all non-producing areas, such as new plantations that have not yet started to produce" (Regulation (EC) No 543/2009 of the European Parliament and of the Council of 18 June 2009, Article 2 (f)). In this report, this corresponds to the line "Planted Area." Not all MS publish harvested data. Hence, in this report, the line "Area Harvested" is a FAS Post estimate.

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

Note: This report is based on information compiled in September 2025.

Table of Contents

Executive Summary

Apples

Commercial apple production in Marketing Year (MY) 2025/26 (July/June) is forecast at 10.7 million metric tons (MT), a marginal increase of 0.3 percent compared to the previous year. If materialized, this would be the third-lowest production in the past decade. 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. EU apple exporters hope to benefit from market opportunities in Northern Africa, the Middle East, and India resulting from a low Turkish apple harvest.

Pears

EU commercial pear production is estimated at 1.78 million MT, a slight increase over MY 2024/25 but still the fourth-smallest harvest in the past decade. After many years of decline, harvested area is stabilizing around 100,000 hectares (ha), while average yields have improved over the years.
A favorable growing season in northwestern Europe boosted output in Belgium, the Netherlands, Germany, and Poland. In contrast, production in Italy is declining due to aging orchards, increasing pest and disease pressure, and the impact of extreme weather. Conference remains the EU's dominant pear variety, showing increased production, while other main varieties like *William Bon Crétien* and *Abate Fetel* are seeing lower volumes this year. In MY 2025/26, EU pear imports are forecast to be again somewhat lower due to higher domestic commercial production. Pears from southern hemisphere countries are responsible for 80 percent of total EU pear imports. In MY 2025/26, EU pear exports are forecast to rebound and possibly reach MY 2023/24 levels due to a better *Conference* crop. However more sales opportunities for *Conference* pears can possibly also be found on the German and French market due to a lower harvest of the competing *Abate Fetel* variety compared to last year.

Table Grapes

MY 2025/26 (June/May), EU table grape commercial production is forecast up 8 percent from the previous season totaling 1.5 million MT. Except for Spain, where production will likely decrease primarily due to prolonged drought, heat waves, and localized hailstorms, production is anticipated to increase in all grape-producing member states due to favorable weather. The largest increase is projected for Italy driven by higher yields per plant and new area entering production. 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.

Overarching Challenges for EU Fruit Farmers

Adverse Weather Conditions

Adverse weather 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.

Shortage of Labor and Labor Costs

A lack of harvest workers is a reoccurring problem. Many of the seasonal workers that previously were coming from Ukraine are now fighting in the war while refugees from Ukraine resident in the EU typically prefer year-round jobs over seasonal work. In Poland and Romania farmers experiment with mechanical harvesting, especially of apples for processing, as potential bruising is less of a problem in this category. Some small family farms are developing outreach and “pick your own”- models, in an effort to reduce costs and harvesting time.

Increasing labor costs, induced either by market forces or through elevated minimum wages (Germany), are putting additional pressure on profit margins.

Lack of Plant Protection Substances and Restrictions on Pesticide Use

A common concern in EU fruit farming is limited availability of plant protection options, either because an approval expires without a replacement in sight, or because substances to combat new and emerging pests or diseases have not been approved. Additionally, limitations on the use of approved substances are more stringent in some member states (for example France, Germany, and the Netherlands).

Lack of Successors

Many farms and particularly smaller farms face difficulties handing over their land to the next generation as fewer young people choose a career in farming. Disappointing profit margins, increasing bureaucracy and documenting requirements, as well as long work hours are some of the factors behind this development.

Impact of Geopolitical Conflicts

More than three years after Russia invaded Ukraine the conflict continues to create direct and indirect challenges for fresh deciduous fruit production, raising production costs (for details see last year’s report).

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

Houthi attacks on commercial vessels in the Red Sea in support of Hamas in the Gaza conflict increased risk and logistics costs for EU fruit exports to Asia. This has made exports more expensive, and some exporters may attempt to diversify to other markets.

Lower Consumption of Apples and Pears

On average, per-capita consumption of apples and pears has been decreasing in recent years as other fruits gain popularity, for example soft fruits, stone fruits, exotic fruits like pineapple, mango, and melons and some – especially younger - consumers turn to other snacks outside the fruit category. Lingering inflation also contributes to lower fruit consumption as consumers have less disposable income.

Section I: Apples

Table 1: Production, Supply, and Distribution – Apples

Apples, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	471,960	471,960	468,000	466,300		461,000
Area Harvested (HA)	452,296	453,340	448,400	442,660		440,500
Commercial Production (MT)	11,447,749	11,432,354	10,192,120	10,701,389		10,736,220
Non-Comm. Production (MT)	642,660	636,166	816,500	835,380		784,800
Production (MT)	12,090,409	12,068,520	11,008,620	11,536,769		11,521,020
Imports (MT)	255,600	255,597	350,000	270,453		250,000
Total Supply (MT)	12,346,009	12,324,117	11,358,620	11,807,222		11,771,020
Domestic Consumption (MT)	11,395,609	11,374,219	10,408,620	10,832,583		10,857,020
Exports (MT)	950,400	949,898	950,000	974,639		975,000
Total Distribution (MT)	12,346,009	12,324,117	11,358,620	11,807,222		11,771,020
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Not official USDA data. Sources: Area planted for MY 2023/24 and 2024/25: Eurostat; trade for MY 2023/24 and 2024/25: Trade Data Monitoring, LLC (TDM) accessed in September 2025; 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 81 percent of total EU commercial apple production. EU commercial apple producers feel squeezed between higher risks resulting from adverse weather, higher production costs resulting from increased input 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

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

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 0.5 percent in MY 2025/26 with reductions mostly occurring in Poland, France, Romania, Hungary, Czechia, the Netherlands, and Bulgaria. Smaller reductions (less than 100 ha) were recorded in Slovakia, Sweden, Belgium, Germany, Austria, and Slovenia. In Greece and Italy, 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. Some of the old orchards were replaced with new plantings using newer varieties, like *Shampion, Gala, Golden Delicious*, partly replacing *Idared*. Additionally, producers are increasingly switching to club varieties.
- In France, some older orchards are not being replaced.
- 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. Less than 2,500 ha of Hungary's apple area consist of modern plantations.
- 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. According to the Dutch Central Bureau of Statistics, only 10 percent of all fruit growers are younger than 40. As a result, some orchards that have reached the end of their production cycle are not being replanted.
- Over the past decade, Czechia has lost more than 7,000 ha of orchards, about 40 percent of total fruit-growing land, primarily due to unprofitable cultivation. Apple orchards now cover roughly 4,800 ha.
- In Bulgaria, farmers report much lower harvested area due to losses from April frosts.

Production

Commercial apple production in MY 2025/26 is forecast to remain relatively stable with a marginal increase of 0.3 percent compared to the previous year. If materialized, this would be the third-lowest production level in the past decade. Production is estimated to have increased or rebounded in Germany, Poland, Czechia, Austria, Netherlands, Greece, Belgium, and to a lower extent in Portugal, Denmark, and Ireland, due to favorable weather conditions, particularly the absence of late frost and hail damage. However, the combined increase is balanced by reductions in Hungary, France, Italy, Romania, Croatia, Slovenia, Spain, the Baltics, and Bulgaria. Major factors contributing to lower production in those countries were late spring frosts and a lack of harvest workers.

Adverse weather conditions increasingly affect 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 Bulgaria, Romania, Hungary, the Baltics, and parts of Poland. Additionally, the frequency of droughts and floods increased.

MY2024/25 production was revised up due to changes in official data from member states. Production was higher than originally estimated in Italy, France, Poland, Germany, and Hungary. In contrast, in Austria and Greece it did not live up to previous expectations. Post revises its import estimates down and exports up, reflecting higher production.

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 sources report 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 2023 (latest available data), the six member states with the largest organic apple acreage were France, Germany, Italy, Poland, Hungary, and Romania, together accounting for 84 percent of organic apple area.

At Prognosfruit,[3] EU organic production was forecast to increase to 605,000 MT compared to 602,000 MT in 2024, taking the organic sector's share of total EU commercial apple production marginally up to 5.64 percent (compared to 5.63 percent in 2024). This is well below the 25 percent market share goal the EU set for 2030.

[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 Commercial Table Apple Production by Country and Year in MT

COUNTRY	2023/24	2024/25	2025/26 e	Change 2024/25 to 2025/26	Share of Total Production in 2025/26
Poland	3,970,000	3,300,000	**3,400,000**	3%	31%
Italy	2,174,674	2,328,556	**2,248,025**	-3%	21%
France	1,585,300	1,656,550	**1,575,000**	-5%	15%
Germany	941,212	871,992	**1,021,740**	17%	8%
Spain	439,425	474,629	**460,000**	-3%	5%
Romania	405,000	370,000	**345,000**	-7%	4%
Portugal	292,230	292,120	**298,000**	2%	3%
Greece	242,644	250,000	**280,000**	12%	3%
Netherlands	199,000	194,000	**226,000**	16%	3%
Belgium	197,000	154,000	**178,000**	16%	2%
Austria	156,309	103,955	**177,500**	71%	1%
Hungary	459,792	344,560	**160,000**	-54%	1%
Czechia	101,017	37,487	**116,790**	212%	1%
Croatia	61,528	67,706	**48,000**	-29%	1%
Slovenia	30,598	50,654	**35,000**	-31%	0.3%
Slovak Republic	26,395	35,579	**32,365**	-9%	0.3%
Sweden	32,000	32,000	**32,000**	0%	0.3%
Bulgaria	32,933	34,830	**31,100**	-11%	0.3%
Denmark	15,000	21,000	**24,000**	14%	0.2%
Ireland	19,500	18,600	**21,500**	16%	0.2%
Lithuania	35,000	40,000	**10,000**	-75%	0.2%
Finland	7,797	9,171	**9,200**	0%	0.1%
Latvia	8,000	14,000	**7,000**	-50%	0.1%
Total	**11,432,354**	**10,701,389**	**10,736,220**	**0.3%**	

e= estimated; Note: The table is grouped by ranking in MY 2025/26. Due to rounding, percentages add up to marginally more than 100 percent. Source: FAS EU posts

Member State Specific Production Information

- In Poland, projected higher production is a result of higher yields despite a 1.3 percent lower area. However, crop conditions vary greatly depending on location and apple variety. The mild winter increased pest infestation and evaporation of soil moisture. The beginning of April was anomalously warm, but the end of the month and the beginning of May brought frosts up to -15 degrees Celsius in valleys and depressions. This resulted in very variable conditions in orchards, even those adjacent to each other, depending on their location. *Red Jonaprince*, *Gala*, and some club varieties suffered the most from the April and May frosts. *Idared* and *Ligol* varieties were in the best yield-producing condition. Higher temperatures and rainfall positively impacted plant condition and yields in June and July. Mid- and late-maturing varieties particularly benefited while earlier varieties yielded less. Apple quality in MY 2025/26 varies greatly, depending on

region and producer. The sunny weather in August was favourable for the colouring of red apples. In many regions the weather did not allow for effective treatments against the scab fungus (*venturia inequalis*). Additionally, many growers refrained from using plant protection and fertilizer to save costs. The lack of harvest workers is a reoccurring problem.

- Italian production is forecast to decline by 3 percent compared to MY 2024/25. Regionally, Trentino is expected to see a 5 percent increase, supported by favorable weather, while most other areas face declines: Alto Adige (-3 percent), Piedmont (-15 percent following exceptionally high yields in MY 2024/25), Veneto (-11 percent due to hail damage), Emilia-Romagna (-6 percent), and Friuli-Venezia Giulia (-5 percent). Fruit quality is expected to be within normal ranges with excellent color in Piedmont.
- French apple production is expected to slightly decline by 3 percent in 2025 but still remains 8 percent above the five-year average. This decline is mainly due to a slow decline in production area (as older orchards are not replaced) but also strong aphid pressure due to a wet spring (that also happened at the flowering period) followed by excessive heat in August 2025 in most apple producing regions that blocked fruit growth. Farmers in most regions had difficulties controlling pests, citing French pesticide restrictions that exceeds EU ones.
- Spain expects lower production and good quality. The Pear and Apple Committee of FEPEX (Fruits and Vegetables exporters association), has expressed serious concerns about the spread of plant diseases, particularly the 'fire blight,' which is harming a significant portion of production.
- Germany expects a rebound of production after the frost-stricken previous year. 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, 2025, the minimum wage (which also applies to seasonal labor) increased in six installments from 9.50 Euro to 12.82 Euro per hour. The next increases to 13.90 Euro and 14.60 Euro will occur on January 1, 2026, and January 1, 2027, respectively.
- In Romania, late frosts in April affected orchards during the pink-bud stage, impacting their productivity. Later, a cool spring and frequent rains in some areas reduced the efficacy of plant treatments in some areas, while insufficient rainfall and high temperatures in the following development stages reduced the potential for adequate fruit sizes.
- In Greece, spring weather favoured fruit set and fruit development, however hail that occurred mostly in Northern Greece reduced the yields for some varieties. Outside the hail-affected regions, quality is expected to be excellent.
- In the Netherlands, a mild winter advanced the entire growth cycle, leading to a harvest which started one to two weeks earlier than usual. Thanks to abundant sunshine, apples developed a vibrant color and rich flavor, and apple quality is exceptionally high, making this one of the most promising crops in years. For more detailed information see GAIN report NL2025-0021.
- Large production increases in Austria and Czechia reflect a rebound from very low production in the previous year, when frosts severely affected production.
- In contrast, Hungary expects an unusually poor harvest. This is the result of a combination of factors. The extreme drought and heat stress of the previous (2024) summer and early autumn

contributed to deterioration of flower buds. Late spring frosts (April 7-8 and May 10) caused severe damage to flowers and young fruits. Lastly, structural factors including a constant decrease in area and deteriorating orchard conditions, led to a decline in yield potential.

- Ireland's apple harvest is likely to be one of the best in years, with yields particularly strong following the warmest and sunniest spring on record, resulting in better pollination, strong fruit set, and excellent color and flavor development.

Varieties

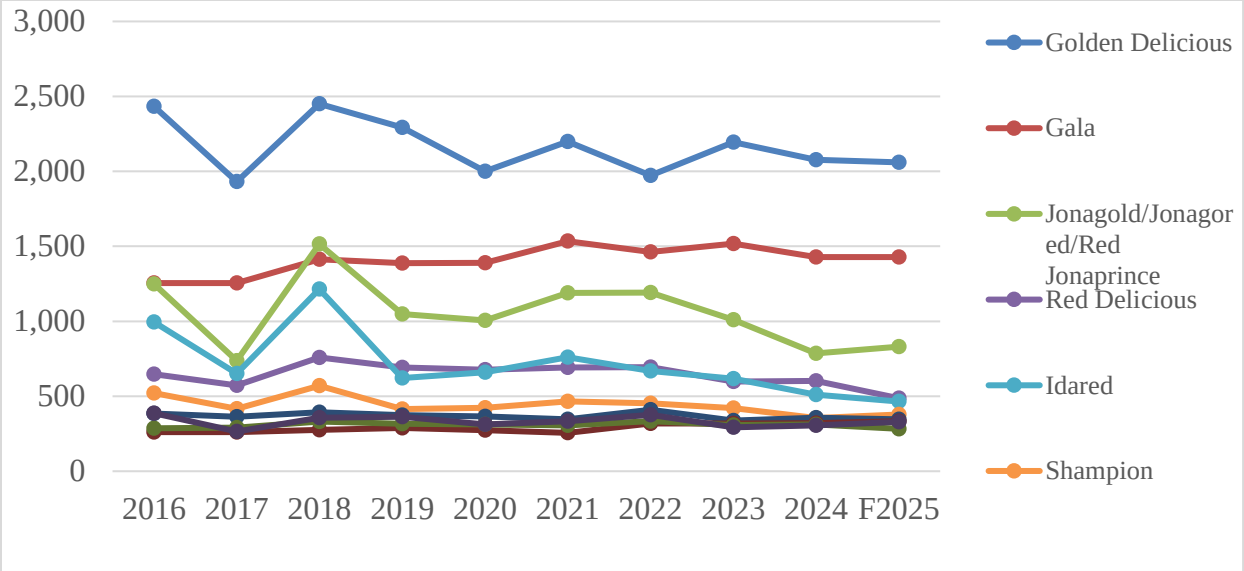
Some 25 apple varieties are produced commercially in the EU in volumes exceeding 10,000 MT. Among these, *Golden Delicious, Gala types*, and *Jonagold types (Jonagold, Jonagored, Red Jonaprince)* are the dominant varieties. However, production patterns vary. While *Golden Delicious* is the variety with the largest production in Italy, France, Spain, Portugal, and Romania, *Jonagold types* are dominant in Belgium and Germany. 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* was one of the top varieties in Eastern Europe prior to the Russian import ban.[4] It 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 to 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 organic production sector and reduce disease management costs. Examples of such varieties include *Topaz* and *Santana.* Varieties with low allergenic potential such as *Santana* and *Pompur*® are also gaining popularity.

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"[5] 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.

[4] See policy section.
[5] Club varieties are managed and grown under a licensing agreement with plant breeders or variety consortia. The licensing agreements usually restrict planted area and include variety-specific quality and marketing rules.

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



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

Apples - Non-commercial Production

Non-commercial production in MY 2025/26 is estimated to have dropped 6 percent compared to the MY 2024/25 harvest. This is mostly due to reductions in Germany, Austria, Hungary, Romania, and Belgium despite higher production in Czechia, Slovenia, Ireland, and the Netherlands. Non-commercial production tends to alternate between good and poor crop years. In MY 2025/26, non-commercial production represents about 6.8 percent of total apple production, compared to 7.2 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 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 apple stocks amounted to 340,538 MT on July 1, 2025, compared to 429,506 MT at the same time in 2024.

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 "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); stone fruit (for example in Spain); exotic fruit like pineapple, mango, and melons (for example in the Netherlands); or turn to other snacks outside the fruit category

Apples - Processing

In MY 2025/26, apple processing is expected to decrease 6 percent compared to MY 2024/25, amounting to roughly 3.6 MMT. Volumes going into processing are expected to decrease in the majority of member states as a result of lower non-commercial production. In contrast, volumes going into processing are projected to be higher in Poland and Austria, based on higher non-commercial production and to a lesser extent in the Netherlands. Processing is expected to remain flat in Bulgaria and Portugal.

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 Scandinavian countries to 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 and 4 percent of the total EU apple supply.

EU External Trade

<u>EU – UK trade</u>
EU 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 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 2025/26, EU imports are expected to decrease by about 8 percent, as projected higher imports in Austria, Belgium, Romania, and Portugal are not enough to compensate for lower imports elsewhere. Projected reductions are most pronounced in Ireland, Greece, Spain, the Netherlands, and Bulgaria.

In Ireland culinary apples from Northern Ireland for cider making account for a large part of imports. These imports are forecast to decrease significantly in MY 2025/26 as a shortage of work permits among the casual labor force will likely result in many Northern Ireland apples going unharvested. In Greece the projected reduction is a result of higher domestic production.

In MY 2024/25, EU apple imports were lower than previously expected in line with lower than expected domestic consumption. Fifty-seven percent of EU 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 North Macedonia, Moldova, Serbia, and the UK. Imports from the neighboring Moldova Republic increased significantly after the EU decided in July 2022 to suspend import duties on certain goods originating from Moldova following the start of the war in Ukraine. As a result, Moldovan apple exports to the EU almost tripled within two years. For more information, please see the Policy section of this report.

The Netherlands was by far the largest importer of apples, accounting for 29 percent of EU imports. However, much of the volume entering the Netherlands is transshipped to other member states. Other important importing countries included Romania (sourcing mostly from Moldova and North Macedonia), Bulgaria (North Macedonia), France (the Southern Hemisphere and UK), Ireland (UK), Germany (the Southern Hemisphere), and Greece (North Macedonia and Serbia).

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: EU Imports of Apples in MT

Country of Origin	MY 2022/23	MY 2023/24	MY 2024/25	Change MY 2023/24 To MY 2024/25	Share of Total Imports in MY 2024/25
Chile	70,132	57,164	**74,196**	30%	27%
South Africa	36,125	52,837	**47,318**	-10%	18%
North Macedonia	30,201	39,014	**43,318**	11%	16%
Moldova	12,603	21,160	**31,239**	48%	12%
New Zealand	40,843	28,330	**21,894**	-23%	8%
Serbia	9,455	24,452	**17,674**	-28%	7%
United Kingdom	17,534	10,952	**12,177**	11%	5%
Argentina	4,629	4,495	**7,415**	65%	3%
Brazil	6,492	3,592	**3,878**	8%	1.4%
Ukraine	3,972	9,822	**3,002**	-69%	1.1%
Bosnia and Herzegovina	1,071	642	**2,875**	348%	1.1%
Albania	2,473	981	**2,698**	175%	1.0%
Switzerland	573	230	**1,715**	646%	0.6%
Other	2,116	1,926	**966**	-50%	0.4%
World total	**238,219**	**255,597**	**270,365**	**6%**	

Note: The table is grouped by ranking in MY 2024/25. Due to rounding percentages may add up to marginally less or more than 100%. Source: TDM, LLC accessed on September 2, 2025

Apples - Exports

In MY 2025/26, EU apple exports are forecast to remain flat compared to the previous MY despite slightly lower production in major exporting countries such as Italy and Spain. EU exports will likely be supported by declined production in Türkiye (an important competitor in markets like Northern Africa, the Middle East, and India), which reported a 38 percent lower production compared to the 5-year average.

In MY 2024/25, Italy, Poland, France, Spain, and Greece were the top five apple exporters by volume amongst EU member states for destinations outside of the EU. They accounted for 39, 27, 15, 6, and 5 percent of total EU apples exports, respectively. The UK remained the most important buyer of EU apples followed by Egypt. Exports to Egypt rebounded as its economy improved.

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, Germany, France, Greece, Belgium, and Spain are now exporting to India. Since the start of the pre-clearance program in October 2014, Italy and France are eligible for export to the United States. However, actual exports are minute. 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 Exports of Apples in MT

Country of Destination	MY 2022/23	MY 2023/24	MY 2024/25	Change MY 2023/24 To MY 2024/25	Share of Total Exports in MY 2024/25
United Kingdom	171,214	190,047	**169,832**	-11%	17%
Egypt	162,713	87,644	**143,982**	64%	15%
Brazil	59,447	86,485	**81,548**	-6%	8%
Saudi Arabia	85,021	74,719	**72,641**	-3%	7%
India	81,395	64,110	**51,839**	-19%	5%
Israel	27,312	37,552	**49,213**	31%	5%
Kazakhstan	58,497	61,859	**35,669**	-42%	4%
Norway	33,638	33,197	**32,145**	-3%	3%
United Arab Emirates	40,280	28,959	**29,517**	2%	3%
Belarus	39,003	29,558	**29,305**	-1%	3%
Jordan	22,567	21,740	**25,403**	17%	3%
Colombia	20,793	25,445	**22,381**	-12%	2%
Mongolia	17,578	18,324	**17,830**	-3%	2%
Libya	10,429	12,838	**16,122**	26%	2%
Bosnia and Herzegovina	15,469	14,854	**15,871**	7%	2%
Switzerland	14,930	18,517	**14,992**	-19%	2%
Ukraine	4,038	2,426	**12,017**	395%	1.2%
Vietnam	10,090	9,019	**11,009**	22%	1.1%
Albania	10,008	9,283	**10,854**	17%	1.1%
Morocco	8,905	7,796	**10,379**	33%	1.1%
Mauritania	7,945	7,566	**8,287**	10%	0.9%
Ecuador	10,749	12,896	**8,115**	-37%	0.8%
Serbia	6,053	1,419	**8,089**	470%	0.8%
Uzbekistan	3,879	6,497	**8,049**	24%	0.8%
United States	111	21	**0**	-99%	17%
Other	112,483	87,192	**89,352**	2%	8.1%
World total	**1,034,547**	**949,963**	**974,441**	**-3%**	

Note: The table is grouped by ranking in MY 2024/25. Due to rounding percentages may add up to marginally less or more than 100 percent. Source: TDM, LLC accessed on September 2, 2025

The five largest EU exporters, together account for 91 percent of EU apple exports in MY 2024/25. These were Italy (to Saudi Arabia, Egypt, Brazil, Israel, UK, India, Norway, the UAE, Switzerland, Jordan), Poland (mostly to Egypt, Kazakhstan, Belarus, India, UK, and Mongolia), France (mainly to the UK, Vietnam, the UAE, Colombia, Thailand, India, and Israel), Greece (predominantly to Egypt, lesser

volumes to Israel, Jordan, Albania, Saudi Arabia), and Spain (mostly to the UK, Brazil, Morocco, Mauritania, Colombia, and the UAE).

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

Apples – Prices

Producer prices for apples are expected at a similar to slightly better level than in the previous season as they benefit from 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, especially when including anti-frost irrigation or hail protection nets.

Apples – Additional Information

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

Section II: Pears, Fresh

Section II: Pears, Fresh
Table 5: Production, Supply, and Distribution Pears

Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	103,840	104,109	104,775	104,002		100,536
Area Harvested (HA)	100,613	99,437	100,340	99,814		98,016
Commercial Production (MT)	1,725,591	1,710,599	1,782,444	1,752,575		1,781,930
Non-Comm. Production (MT)	81,727	81,363	85,900	89,618		79,400
Production (MT)	1,807,318	1,791,962	1,868,344	1,842,193		1,861,330
Imports (MT)	182,200	182,999	160,000	171,361		167,000
Total Supply (MT)	1,989,518	1,974,961	2,028,344	2,013,554		2,028,330
Domestic Consumption (MT)	1,692,918	1,675,330	1,738,344	1,733,585		1,729,330
Exports (MT)	296,600	299,631	290,000	279,969		299,000
Total Distribution (MT)	1,989,518	1,974,961	2,028,344	2,013,554		2,028,330
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Not official USDA data. Sources: Trade for MY 2023/24 and 2024/25: Trade Data Monitoring, LLC (TDM) accessed in September 2025; All other: FAS EU posts

Pears – Production

Pears – Commercial Production

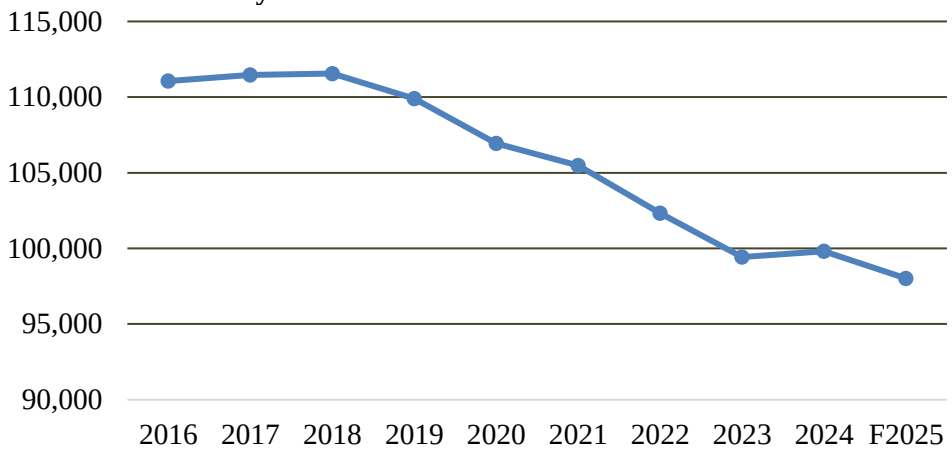
EU commercial pear production is forecast at 1.78 MMT, an increase of almost 2 percent (or 29,359 MT) compared to MY 2024/25 due to favorable weather in major producing countries. The Netherlands, Belgium, Italy, Spain, France, and Portugal continue to lead production, and, in MY 2025/26, together represent 86 percent of total EU commercial production.

Post revises MY 2024/25 EU commercial pear production down almost 2 percent due to lower production in Spain, Belgium, and Greece, and to a lesser extent Portugal and the Netherlands. The highest reduction in production volume was registered for the *Conference* variety. Smaller sized fruit and fewer pears per tree in Spain led to an 8 percent decline year-on-year (or 20,483 MT). For Belgium and the Netherlands production was lowered due to lower yields (smaller sized pears). Additionally, in Belgium some orchards were destroyed due to bad weather conditions and pests. Greece’s commercial

pear production was adjusted downwards because of worker shortages, higher energy costs, and the bacterial fire blight *Erwinia amylovora* and the insect infestation *Cacopsylla pyri* that destroyed several orchards.

After a decline over many years, harvested area seems to be stabilizing around just below 100,000 hectares. Italy saw its area harvested decrease from 36,326 ha in 2011 to 22,480 ha in 2024, driven by diseases, pests, rising production costs, extreme weather events, and aging orchards. Area harvested also declined, albeit by much smaller amounts, in Hungary and Romania. Factors such as overall pear consumption, costs for replanting, generational interest in managing family orchards, overall profitability, and challenges with pesticide use will continue to determine the area of pear orchards throughout the EU in the coming years.

Chart 2: EU Area Harvested Pear by Year in Ha



Source: FAS EU posts

Growers report higher costs associated with protecting orchards from climate-related adverse weather conditions and protecting fruit against diseases and pests. They are also faced with increasing costs for energy, other inputs, and labor. Having access to skilled labor and water (during dry periods) and increasing difficulties with and limitations on pesticide use, are other longer-term challenges for pear growers in the EU.

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

	MY 2023/24	MY 2024/25	MY 2025/26e	Change MY2024/25 to MY2025/26	Share of Total EU Production in 2025
the Netherlands	358,000	322,000	348,000	+8%	20%
Belgium	370,000	264,000	348,000	+32%	20%
Italy	184,000	400,000	302,000	-25%	17%
Spain	288,029	222,023	247,000	+11%	14%
France	126,240	148,120	138,000	-7%	8%
Portugal	118,350	124,250	125,000	+1%	7%
Poland	98,000	92,000	96,000	+4%	5%
Greece	62,895	70,000	75,000	+7%	4%
Germany	37,791	38,964	40,200	+3%	2%
Romania	19,500	18,882	18,000	-5%	1%
Other	47,794	52,336	44,730	-15%	3%
Total Production	**1,710,599**	**1,752,575**	**1,781,930**	**1.7%**	

e = estimated; Source: FAS EU posts

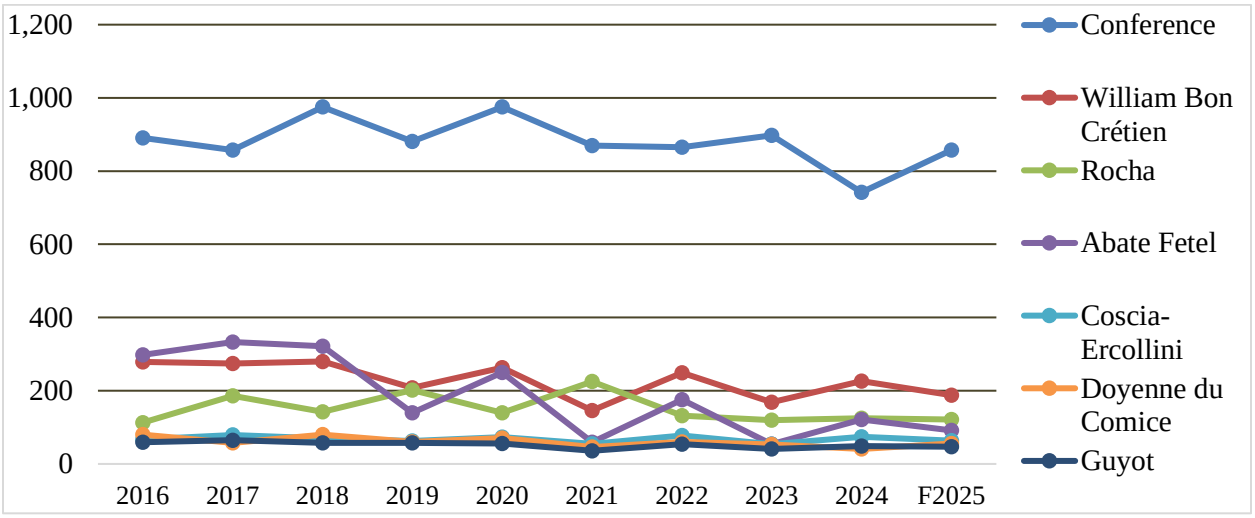
Member State Specific Production Information:

- Pear production in both Belgium and the Netherlands is forecast at 348,000 MT. The *Conference* variety dominates with a share of about 90 percent and 75 percent, respectively. At the same time growers are increasingly exploring new (club) varieties including *Celina/Qtee®*, *Sweet Sensation®*, *Migo®*, and *Xenia®* to diversify the market. Roughly 55 percent of the Belgian pears are produced in the Haspengouw area. Although drought conditions led to somewhat smaller fruit on heavily laden trees, the overall fruit quality is excellent, marked by high sugar levels, smooth skins, and strong taste thanks to a season of abundant sunshine and timely rainfall. After last year's very poor harvest, this calmer spring with only little frost allowed for good fruit set, even if a biting northeasterly wind caused more than usual fruit drop.
- In the Netherlands, most pear orchards can be found in the Provinces of Zeeland, Gelderland, and Utrecht. The growing season was highly favorable, with no frost, excellent pollination, and abundant sunshine, resulting in fruit of outstanding quality and flavor. Harvest started one to two weeks early due to the mild winter. Still, conditions were somewhat uneven as in Zeeland prolonged drought and heat since mid-June cut yields and reduced fruit size, forcing some growers to rely on stored water for irrigation.
- Pear production in Italy is heavily concentrated in the Northeast, with Emilia-Romagna accounting for nearly 75 percent of national output. *Abate Fetel* and *William Bon Crétien* remain the leading cultivars. National production has been on a downward trend for over a decade, largely due to a sustained reduction in harvested area. In MY 2025/26, pear orchards are estimated to cover 20,636 hectares. Yields have also declined sharply, from 24.8 MT/ha six years ago to 14.3 MT/ha today. This reduction reflects orchard aging, increasing pest and disease pressure, and the impact of extreme weather. After a temporary rebound last year, production is

forecast to drop again this season. Late frosts, summer hailstorms, and the progressive decline of older orchards have led to reduced or, in some cases, completely lost harvests. While volumes are down, fruit quality is expected to remain high. However, orchard management is becoming increasingly complex as climatic variability continues to intensify pest and disease challenges.

- In Spain, commercial production is forecast to rise by 11 percent, marking a rebound from last year. Even so, output will still fall short of Catalonia's full production potential and remain below the average of recent years. Catalonia continues to lead Spain's pear sector, with the *Conference* variety accounting for about half of Spain's total pear production. With increasingly extreme weather conditions affecting orchards, producers are also looking ahead by testing and adopting more climate-resilient pear varieties to safeguard future harvests.
- The French pear crop for MY 2025/26 is projected to decline by 6 percent compared to MY 2024/25, though it remains 9 percent above the five-year average. The harvest was affected by a wet spring during flowering, followed by excessive heat in August across most pear-producing regions, resulting in smaller fruit on average. The exception is the Pays de la Loire region in western France, where the crop is 20 percent higher than in MY 2024/25. The area harvested is also slightly growing especially in the Pays de la Loire region as some local fruit growers benefit from strong local demand.
- Pear production in Portugal is once again expected to be low, likely close to last year's level. Pear growth is lagging, and it remains uncertain whether last year's volumes can be matched. If fruit size stays small, total output will decline further. Warmer winters continue to create favorable conditions for pests early in the season, while diseases such as *fire blight* and *pear stenphylliosis* pose ongoing challenges for growers. The situation is made more difficult by the EU's withdrawal of certain plant protection products, leaving *fire blight* in particular harder to control. As a result, the industry and researchers are working together to develop more resistant pear varieties and explore alternative solutions to protect orchards.
- Recent years saw more young orchards in Poland, often replacing apple trees, with new plantings focused on pears for the fresh market. Investments aim to intensify production, driven by export demand. The orchard structure is shifting toward intensive varieties while older, less-productive orchards are being phased out. Pear orchards avoided winter frost damage in MY 2024/25, but a mild weather increased pest pressure and early-season water shortages due to dry soils. Spring 2025 was colder than normal. Warm conditions in early April were followed by frosts down to -15°C, causing highly variable orchard impacts. May ranked among the coldest on record. Rainfall was above normal in the northwest and west, but average in the southeast. Flowering occurred on schedule with good pollination. Warmer, wetter weather in June–July improved orchard conditions. Mid- and late-maturing varieties yielded well, while early varieties underperformed.
- Greece's pear production is forecast at 75,000 MT, up by approximately 5,000 MT compared to last year due to good weather conditions throughout the growing season. As a direct result, fruit quality is also expected to be very good. This year, the area harvested for pears totals an estimated 5,300 hectares and *Krystalli* is the leading pear variety in Greece.

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



F = forecast, Source: WAPA data

Conference pears represent almost half of all pears grown in the EU in MY 2025/26 and are mainly grown 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), *Doyenne du Comice* (the Netherlands and France), and *Guyot* (France and Spain).

The interest to start producing club varieties such as *Celina/Qtee®*, *Sweet Sensation®*, *Migo®*, and *Xenia®* continues to grow, in particular among Dutch and Belgian growers. The production of these varieties, whose patent, trademark, and marketing are protected, is forecast at 94,000 MT in MY 2025/26, and is expected to further increase in the coming years.

According to WAPA data, the production of organically produced pears is estimated at 90,000 MT this year. It represents 5 percent of total production and half of it is produced in Italy alone.

Pears – Non-Commercial Production

Non-commercially produced pears include pears grown in home gardens and meadows and when harvested, they are often consumed domestically. Austria, Czechia, Romania, and Slovenia all have non-commercial production volumes which account for 50 percent or more of total pear production in their countries. MY2025/26's EU non-commercial volume (79,400 MT) is lower compared to the previous MY, which is mostly due to lower production in Austria, and, to a lesser extent, Romania and Hungary, despite larger volumes going into processing in Czechia and Belgium. Austria, Romania, and Czechia alone account for almost 78 percent of non-commercial production.

Pears – Consumption

Overall, MY 2025/26 consumption is anticipated to decrease to just below 1.73 MMT as per-capita consumption declines, particularly among younger consumers. The most popular pear varieties consumed 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. The forecast for MY 2025/26 is that more *Conference* will likely be available while the availability of *Abate Fetel* and *William Bon Crétien* on the local market will decline. The average per-capita consumption of fresh pears in the EU is estimated at 3 kilograms per year with higher 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 2 kilograms per year or less, include countries in Central and Eastern Europe.

On a consumer level, most pears are eaten at home or at work as an afternoon snack and are predominantly bought at local food retailers and fresh produce specialty shops. Its health benefits, freshness, taste, and texture are the main reasons why consumers eat fresh pears. The consumption of pears remains strong among households with children and older consumers. While per capita consumption of pears is up in some markets, like Bulgaria, pear consumption is under pressure in many other countries including Italy, Spain, France, Germany, Romania, and the Netherlands. Club varieties seem to better match with consumer trends (crunchier pears and those with a longer shelf life) compared to more traditional varieties.

Younger consumers, in particular, have developed an appetite for stone fruits and berries while others are gravitating towards snack products like confectionery products, biscuits, and flavored drinks – all at the expense of traditional fruits. Another factor is price, and higher costs of living are pushing other consumers towards lower-priced and further-processed food options. Initiatives to win back some consumers include food retailers offering single-serving fruit salads and promoting club varieties which 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 2025/26, processing volumes are estimated at 272,325 MT of which over one-third are pears produced in Italy, where pears are bought by the local juice industry. Austria is the second largest producer of pears for processing and expects to process this year 36,690 MT of pears into Perry (or pear cider), an alcoholic beverage made from fermented pears. Combined processing volumes in Belgium, France, Poland, and Spain are expected to total an estimated 100,000 MT, most of which are used for juice, compote, and canned products.

Pears – Trade

EU External Trade

To date Brexit has not impacted EU pear trade as Dutch and Belgian traders are well prepared to deal with the additional paperwork resulting from the UK leaving the EU. This might change when the UK introduces phytosanitary certification obligations and physical checks which have been postponed to January 31, 2027.

Pear – Imports

In MY 2024/25, imported pears represented almost 9 percent of total EU pear supply with most of them ending up in the EU's fresh market. Pears from southern hemisphere countries are responsible for 80 percent of total EU pear imports. Imports from these countries take place year-round but really pick up in February, peak in April, and subside in June. Imports for MY 2024/25 followed this pattern and popular imported varieties include *Packham, Abate Fetel, Forelle,* and *Williams Bon Crétien*.

Türkiye continues to be the EU's fourth largest supplier of pears and Romania, Bulgaria, and Germany dominate these imports and these pears are often re-exported. China is the EU's fifth largest supplier of pears, and ships Asian pears, including the popular *Ya* variety, which is predominantly consumed by the Asian population in the EU. Serbia remains a stable supplier of pears to the Croatian market to meet local demand. In MY 2024/25, Bosnia and Herzegovina gained share in this market due to proximity and price. Imports of pears from the United States are currently non-existent due to the EU's strict Maximum Residue Level (MRL) for pesticides, including *diphenylamine* and the use of *morpholine* as an additive in waxes.

In MY 2024/25, the Netherlands and Italy together accounted for two-thirds of the EU's pear imports. Most of the volume entering the Netherlands via the port of Rotterdam continued to be shipped to other member states, in particular Germany. Most of the Iberian Peninsula's imports stayed on the local market due to lower local commercial production last year.

EU imports were down by 6 percent in MY 2024/25 compared to MY 2023/24 due to higher EU commercial pear production that year. In MY 2025/26, EU pear imports are forecast to decline slightly due to higher domestic commercial production.

Table 7: EU Import of Pears in MT

Country of Origin	MY 2022/23	MY 2023/24	MY 2024/25	MY 2023/24 to MY 2024/25	Share of Total Imports in MY 2024/25
South Africa	55,252	82,856	**70,471**	-15%	41%
Chile	34,594	38,006	**36,743**	-3%	21%
Argentina	24,482	32,312	**29,965**	-7%	17%
Türkiye	12,670	13,932	**14,899**	7%	9%
China	8,286	10,996	**11,330**	3%	7%
Serbia	3,003	2,978	**4,410**	48%	3%
Bosnia & Herzegovina	908	776	**2,586**	233%	2%
United Kingdom	483	543	**584**	8%	0%
Other	660	600	**373**	-38%	0%
Total	**140,338**	**182,999**	**171,361**	**-6%**	

Sources: Trade Data Monitoring (TDM) accessed in September 2025

Pear – Exports

In MY 2025/26, EU pear exports are forecast to increase and possibly reach MY 2023/24 levels due to a better *Conference* crop. However more sales opportunities for *Conference* pears, in particular the somewhat smaller-sized pears, can possibly be also found on the German and French market due to a lower harvest of *Abate Fetel* compared to last year.

With some export markets increasingly buying from the southern hemisphere, EU pear exports dropped from just over 450,000 MT in MY 2017/18 to 279,969 MT in MY2024/25. Pear exports are largely comprised of pears produced in the EU, as opposed to transshipments. For MY 2024/25, exports were down by 7 percent compared to the year before, due to a record low production of *Conference* pears.

The UK and Belarus have taken turns as the largest export market for European pears for several years, but the UK is emerging as the consistent top EU market. EU exports to the UK have settled around 82,000 MT in MY 2023/24 and MY 2024/25. EU pear exports to the UK could increase slightly in MY 2025/26 as well as exports to other mature consumer markets in Europe, such as Norway and Switzerland, as a direct result of a good *Conference* harvest.

Belarus, Kazakhstan, and other countries that have proximity to Russia like Azerbaijan and Georgia, are also important markets for Belgian and Dutch *Conference* pears. EU pear exports to former Soviet Republics are expected to remain strong.

Rocha pears remain highly popular in Brazil, the key export market for Portuguese producers. Since exports closely follow domestic production levels, and output is forecast to remain stable compared to

last year, shipments to Brazil are also expected to stay unchanged. Portugal continues to be a net exporter of pears, with production volumes exceeding domestic consumption.

For the past five years, EU pear exports to China and Hong Kong combined have gradually declined by over half to 3,894 MT in MY 2024/25. For MY 2025/26, no major changes to this combined market are expected.

European pear traders are still focused on hedging against risk, especially with current geopolitical challenges 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 unfamiliar pear varieties will take time and effort, likely spanning several years.

Table 8: EU Pear Exports in MT

Country of Destination	MY 2022/23	MY 2023/24	MY 2024/25	MY 2023/24 to MY 2024/25	Share of Total Exports in MY 2024/25
United Kingdom	98,516	82,178	81,794	0%	29%
Belarus	109,684	76,037	52,320	-31%	19%
Kazakhstan	15,086	25,920	34,288	32%	12%
Morocco	34,337	26,625	28,927	9%	10%
Brazil	21,085	22,486	19,340	-14%	7%
Norway	11,522	14,723	11,821	-20%	4%
Israel	2,471	1,825	6,223	241%	2%
Ukraine	4,604	2,874	5,701	98%	2%
Switzerland	8,014	9,689	5,517	-43%	2%
Libya	4,658	3,175	3,404	7%	1%
Saudi Arabia	2,746	3,499	3,378	-3%	1%
China	6,425	4,917	3,251	-34%	1%
Albania	1,843	2,756	3,044	10%	1%
Canada	1,603	1,536	2,428	58%	1%
Bosnia and Herzegovina	3,267	3,488	1,969	-44%	1%
Russia	1,694	1,479	1,803	22%	1%
Serbia	2,460	3,112	1,712	-45%	1%
Other	20,493	13,312	13,049	-2%	5%
Total	**350,508**	**299,631**	**279,969**	**-7%**	

Sources: Trade Data Monitoring (TDM) accessed in September 2025

Pear – Prices

MY 2025/26 has the fourth-smallest harvest in the past decade and the overall quality of the harvested pears is good, creating upward pressure on prices. Producer prices for early varieties started at a higher price than last year and slightly higher prices are also expected for other pear varieties. Higher prices for growers are needed to compensate for increased costs of labor, packaging, energy, and plant protection.

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	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jun 2023		Jun 2024		Jun 2025	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	96,559	96,579	96,690	96,367		96,180
Area Harvested (HA)	93,229	93,961	92,750	92,236		92,720
Commercial Production (MT)	1,306,909	1,423,896	1,086,580	1,409,657		1,519,600
Non-Comm. Production (MT)	4,027	4,027	3,450	3,188		3,000
Production (MT)	1,310,936	1,427,923	1,090,030	1,412,845		1,522,600
Imports (MT)	599,300	604,882	630,000	656,878		550,000
Total Supply (MT)	1,910,236	2,032,805	1,720,030	2,069,723		2,072,600
Fresh Dom. Consumption (MT)	1,783,836	1,868,069	1,605,030	1,939,817		1,943,600
Exports (MT)	126,400	164,736	115,000	129,906		129,000
Total Distribution (MT)	1,910,236	2,032,805	1,720,030	2,069,723		2,072,600
(HA), (MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Not official USDA data. Sources: Trade for MY 2023/24 and 2024/25: Trade Data Monitoring, LLC (TDM) accessed in September 2025; 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 86 percent of the EU's total production. In MY 2025/26 (June/May), commercial EU table grape production is forecast to rise compared to the previous season. This growth is mainly due to larger harvests in Italy, driven by higher yields per plant, new hectares entering production, and favorable weather conditions between June and September. Production is also expected to increase in Greece, France, Romania, and Portugal. By contrast, Spain is forecast to record lower volumes, primarily due to prolonged drought, heat waves, and localized hailstorms. Overall fruit quality is expected to be excellent, with high sugar content thanks to the hot summer months.

MY 2025/26 EU table grape harvested area is forecast to remain stable, with new seedless varieties coming into production in Italy (mainly in the Puglia region), Spain (Murcia), and Portugal (Ribatejo

and Alentejo). These are gradually replacing seeded varieties. Nevertheless, rising input costs - particularly energy and logistics - as well as difficulties in sourcing labor remain major challenges for EU table grape growers.

MY 2024/25 production was revised up due to higher production in Italy.

Table 10: EU Commercial Table Grape Production by Country and Year in MT

COUNTRY	MY 2023/24	MY 2024/25	MY 2025/26e	Change 2025:2024	Share of Total EU Production in 2025
Italy	696,396	730,000	**850,000**	16%	56%
Spain	347,700	364,000	**320,000**	-12%	21%
Greece	273,040	210,000	**240,000**	14%	16%
France	41,770	47,360	**48,000**	1%	3%
Romania	36,500	33,000	**35,000**	6%	2%
Portugal	16,890	15,209	**16,500**	8%	1%
Bulgaria	11,600	10,088	**10,100**	0.1%	1%
Total	**1,423,896**	**1,409,657**	**1,519,600**	**14%**	**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 2025/26 non-commercial EU table grape production is forecast to decrease by approximately 6 percent compared to the previous season as a result of lower volumes in Romania (-7 percent) and Bulgaria (-37.5 percent) due to unfavorable weather.

Table Grapes – Consumption

In MY 2025/26, EU fresh grape consumption is forecast to remain largely unchanged from the previous season, due to steady demand for seedless and other varieties. Fresh grapes are increasingly perceived as a tasty and healthy snack. Consumption is mostly met by domestic production, while imports typically supply the market during the first half of the calendar year. Imports from third countries account for approximately 34 percent of total consumption, with most shipments coming from Southern Hemisphere suppliers.

Italy, Germany, Spain, Greece, and France are expected to remain the largest consumers of table grapes in the EU, followed by Romania, Portugal, Czechia, Austria, Bulgaria, Slovakia, Croatia, and Slovenia. While Italian seeded grapes are still widely eaten, EU consumers are showing a clear preference for seedless varieties (*Sugraone, Crimson, Thompson, Regal, Summer Royal, Scarlet Royal, Autumn King, Cotton Candy,* etc.).

Table Grapes – Trade

Table Grapes - Imports

Unlike apples and pears, the EU is a net importer of fresh table grapes. MY 2025/26 EU table grape imports are forecast to decrease due to stronger domestic production. In contrast, during MY 2024/25 imports rose by approximately 9 percent from the previous season, reflecting lower domestic production. The Netherlands and Germany remain the largest EU importers, followed by France, Poland, Spain, Romania, Czechia, Austria, Portugal, Belgium, Ireland, Denmark, Sweden, Slovakia, Italy, Slovenia, Hungary, Croatia, Finland, Lithuania, Bulgaria, Latvia, Estonia, Cyprus, Luxembourg, Greece, and Malta. The Netherlands functions mainly as a re-export hub. Imports from the United States remain rare.

Table 11: EU Imports of Table Grapes in MT

Country of Origin	MY 2022/23	MY 2023/24	MY 2024/25	Change MY2023/24 to MY2024/25	Share of Total Imports in MY 2024/25
South Africa	153,966	183,900	**192,123**	4%	29%
Peru	103,726	81,558	**129,880**	59%	20%
India	86,060	102,827	**97,463**	-5%	15%
Chile	68,279	46,082	**74,400**	61%	11%
Egypt	52,729	65,088	**51,855**	-20%	8%
Moldova	23,241	42,640	**28,000**	-34%	4%
Brazil	25,141	26,555	**26,670**	0.4%	4%
Namibia	24,973	22,466	**21,927**	-2 %	3%
Turkey	22,844	24,650	**21,051**	-15%	3%
Morocco	5,030	4,220	**5,585**	32%	1%
United States	0	2	**17**	629%	0%
Other	7,551	4,894	**7,907**	62%	2%
Total	**573,540**	**604,882**	**656,878**	**9%**	**100%**

Source: Trade Data Monitor, LLC (TDM) accessed in September 2025. Due to rounding percentages add up to marginally more than 100 percent.

Table Grapes - Exports

MY 2025/26 EU table grape exports are forecast to remain flat compared to the previous season, despite higher production. Rising costs for freight, logistics, and transportation—combined with persistent difficulties in securing drivers for long-haul transport—continue to weigh heavily on exports. These challenges have been further aggravated by the ongoing conflict in Ukraine.

In MY 2024/25, EU table grape exports declined compared to the previous year due to lower production and similar logistical and cost-related pressures. Seedless varieties are primarily shipped to the United Kingdom and the United Arab Emirates, while exports to the United States remain marginal.

Table 12: EU Exports of Table Grapes in MT

Country of Origin	MY 2022/23	MY 2023/24	MY 2024/25	Change MY2023/24 to MY2024/25	Share of Total Imports in MY 2024/25
United Kingdom	86,063	85,324	**52,245**	-39%	40%
Switzerland	26,645	25,971	**26,100**	0.5%	20%
Norway	15,787	14,113	**16,391**	16%	13%
Russia	11,351	7,638	**7,458**	-2%	6%
Ukraine	3,655	2,150	**3,405**	58%	3%
South Africa	2,759	2,659	**2,943**	11%	2%
Serbia	1,500	1,197	**2,492**	108%	2%
Albania	1,978	2,931	**2,320**	-20%	2%
Bosnia & Herzegovina	2,697	2,117	**2,145**	1%	2%
Belarus	1,873	2,555	**1,727**	-32%	1%
United States	795	591	**373**	-37%	0
Other	20,578	17,490	**12,307**	-30%	9%
Total	**175,681**	**164,736**	**129,906**	**-21%**	**100%**

Data source: Trade Data Monitor, LLC (TDM) accessed in September 2025. 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

EU Vision for Agriculture and Food

On February 19, 2025, the European Commission published a Communication to the European Parliament and Council laying down its Vision for Agriculture and Food for the 2024-2029 Von der Leyen II mandate. This document will be the basis of upcoming legislative proposals and other actions taken by the EU executive. The Vision lays down the need for the EU to ensure "a global level playing field" for its farmers and improve their competitiveness. To do so, the Commission proposes the adoption of mirror clauses, notably with regards to pesticide residues, increased border controls, and the signature of Free Trade Agreements with more trade partners. The Vision calls for boosting domestic production and diversifying import suppliers to reduce strategic dependencies.

Common Agricultural Policy

On May 14, 2025, the European Commission published a proposal to simplify the Common Agricultural Policy (CAP). The proposed measures target the administrative burden, controls, and implementation of the CAP as well as the CAP crisis management tools. Notably, the proposal simplifies environmental requirements (GAECs for good agro-environmental conditions) linked to eco-payments for farmers. The proposal is now going through the EU legislative process it is expected to be adopted before the end of 2025.

On July 16, 2025, the European Commission unveiled the much-anticipated plan for the next CAP as part of its 2028–2034 EU budget. The proposal marks a major reform, scraping the CAP's two-pillar structure and merging farm funding into broader National and Regional Partnership Plans. The new CAP aims to prioritize performance-based spending, tighter targeting of income support, and greater Member State control. While environmental objectives remain, implementation would shift largely to national discretion. More information in GAIN report: European Commission Unveils CAP Reform with Budget Cut and Structural Change.

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) 2025/680 allocates $153 million (€131.5 million) of EU funds for fruits and vegetables for the 2025/2026 school year for all the Member States. It applies from August 1, 2025.

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 CAP 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, €12.7 million ($14.8 million) out of a total budget of €132 million ($153 million) were set aside for the promotion of EU fresh fruit and vegetables in the EU and in third countries. For more information, please EU 2025 Promotion Programs for Agricultural Products.

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 fresh deciduous fruit in the global MRL database.

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

Certification of Fruit and Vegetables

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

Regulation 2016/2031 concerning protective measures against pests of plants since December 14, 2019, contains provisions concerning compulsory plant health checks. This includes documentary, identity, and physical plant health checks to verify compliance with EU import requirements and uniform conditions for its implementation that are established in Commission Implementing Regulation (EU) 2019/2072. There is more information available on the DG SANTE website: Trade in plants and plant products from non-EU countries.

The Commission monitors imports of fruit and vegetables on an annual basis to determine how to adjust the frequency of testing consignments. There is a reduced frequency of plant health checks for certain products when justified, as per Commission Implementing Regulation (EU) 2022/2389 of December 07, 2022. There is more information available on the DG SANTE website: Reduced frequency checks.

Trade

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 with an ad valorem duty only. The tariff and statistical nomenclature and the Common Custom tariff levels for 2025 and 2026 are published in Commission Implementing Regulation (EU) 2024/2522 and Implementing regulation - EU - 2025/1926 - EN - EUR-Lex. They apply as of January 1, 2025, and January 1, 2026, respectively. The tariffs for fresh deciduous fruits can be found:

Apples: see pages 108 and 761 (2025) / 107 and 766 (2026)
Apple Juice: see pages 181 (2025) / 180 (2026)
Pears: see pages 108 and 763 (2025) / 107 and 767 (2026)
Grapes: see pages 108 and 760 (2025) / 107 and 765 (2026)

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	9%
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 together)	January 1 – December 31	All third countries	20 %

Other Trade Agreements Affecting Fresh Deciduous Fruits Trade in 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, which include concessions on food products. Additional information is available on the website of the EC at: EU Trade agreements (europa.eu)

Mexico: On January 17, 2025, the EU and Mexico announced the conclusion of a new Free Trade Agreement. Similar to the agreement with Mercosur, the text still needs to be formally approved by the European Parliament and the EU Member States. The agreement abolishes customs duties for most goods, including agricultural products. After its ratification, the agreement will reduce tariffs for Mexican grapes exported to the EU and for European apples exported to Mexico. More information can be found on the dedicated webpage.

Mercosur: On December 6, 2024, the European Commission announced that the EU and Mercosur countries reached a political agreement for an EU-Mercosur partnership agreement. In 2019, the European Commission had reached a preliminary agreement with Mercosur countries, but amendments were made to several sectors, including agriculture. The agreement includes a bilateral safeguard clause in case increased imports cause - or even threaten to cause - serious injury to relevant sectors, including agricultural sectors. This safeguard clause also covers imports under tariff rate quotas (TRQs) in the agreement. The text still needs to be formally approved by the European Parliament and the EU Member States. Under the agreement, there is a gradual phase out of duties on 91 percent of EU exports to Mercosur and 92 percent of Mercosur exports to the EU. This includes a reduction of tariffs for deciduous fruits. More information can be found on the dedicated webpage.

EU-Ukraine Trade Relationship

Since 2022 until June 5, 2025, the EU had 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.

As of June 6, 2025, the EU-Ukraine trade relationship reverted to the 2014 Deep and Comprehensive Free Trade Area (DCFTA). The European Commission published Regulation 1132/2025 which prorates the quotas for the seven months remaining of 2025. Once thresholds are met, standard tariffs apply.

On June 30, 2025, the European Commission announced that it has reached an agreement in principle with Ukraine on the review of the DCFTA. As part of the agreement, Ukraine committed to gradually align its agricultural production standards with the EU by 2028. The agreement includes updated tariff concessions for fresh deciduous fruits. Please note that the agreement still needs to be approved by the EU Member States. This is expected to be finalized before the end of 2025.

EU-Moldova Trade Relationship

From June 2022 to July 24, 2025, the EU provided temporary full trade liberalization for Moldovan agricultural products following the start of the war in Ukraine through Autonomous Trade Measures. As of July 2025, the EU-Moldova trade relationship reverted to the 2014 EU-Moldova Association Agreement. The European Commission published Decision 1/2025 of the EU-Moldova Association

Committee which prorates the quotas for the seven months remaining of 2025. Once thresholds are met, standard tariffs apply.

On July 28, 2025, the European Commission announced that it has reached an agreement in principle with Moldova on the review of the Association Agreement. The agreement includes updated tariff concessions for fresh deciduous fruits. Please note that the agreement still needs to be approved by the EU Member States. This is expected to be finalized before the end of 2025.

EU-US Trade Relationship

On July 27, 2025, United States President Trump and European Commission President von der Leyen announced a political agreement on tariffs and trade to rebalance the economic relationship between the world's two largest economies. For more information on the agreement, please refer to the White House Fact Sheet and the European Commission's explanatory webpage.

To ensure effective implementation of the political agreement, the European Union published Implementing Regulation 2025/1727 suspending its retaliatory tariffs on certain U.S. products imposed by Implementing Regulation 2025/1564.

Additionally, on August 29, 2025, the European Commission proposed legislation that would eliminate tariffs on most U.S. industrial goods and a basket of agricultural goods. This still needs to be adopted by the European Parliament and the Council of the European Union. For fresh deciduous fruits this would lead to a lowering of tariffs for US exports to the EU as shown in the table below.

HS Code	Commodity	Proposed new tariff for US exports to the EU
0808 10 10	Fresh cider apples, in bulk, from 16 September to 15 December	0%
0808 30 10	Fresh perry pears, in bulk, from 1 August to 31 December	0%
0806 10 10	Fresh table grapes	Ad-valorem component (variable duty rates depending on date) suspended to zero. Specific duty component maintained
0808 10 80	Fresh apples (excluding cider apples, in bulk, from 16 September to 15 December)	Ad-valorem component (variable duty rates depending on date) suspended to zero. Specific duty component maintained
0808 30 90	Fresh pears (excluding perry pears in bulk from 1 August to 31 December)	Ad-valorem component (variable duty rates depending on date) suspended to zero. Specific duty component maintained

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 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. In May 2025, Belarus lifted the ban on imports of select fruits and vegetables from the EU, including apples.

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 4-6, 2026
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 10-13, 2026
FRUIT ATTRACTION Madrid, Spain (Interval: yearly) https://www.ifema.es/en/fruit-attraction	Next Fair: October 1-3, 2026

Section VI: Related Reports

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

Prognosfruit 2025 - EU Production Stable for Apples Up for Pears | E42025-0004Berlin | European Union | Published On: September 17, 2025 Prognosfruit 2025 - EU Production Stable for Apples Up for Pears_Berlin_European Union_E42025-0004
Dutch Apple and Pear Orchards Poised for a Fruitful Season | NL2025-0021The Hague | Netherlands Published On: August 01, 2025 Dutch Apple and Pear Orchards Poised for a Fruitful Season_The Hague_Netherlands_NL2025-0021
Fresh Deciduous Fruit Annual | E42024-0005Berlin | European Union | Published On: November 06, 2024 Fresh Deciduous Fruit Annual_Berlin_European Union_E42024-0005
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
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
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