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Report Highlights:

In MY 2025/26, EU production of stone fruits (peaches and nectarines, and cherries) is estimated below last season's levels in response to both unfavorable weather conditions, and a reduction in planted area in the case of peaches and nectarines. The shorter domestic supply is expected to reduce consumption as supply, particularly of cherries, is limited in EU's main trading partners. Similarly, the lower EU crop is expected to preempt peaches and nectarines exports from expanding.

Disclaimer: This report presents the situation and outlook for stone fruit including peaches, nectarines, and cherries in the EU. The report presents the views of the authors and does not reflect the official view of the U.S. Department of Agriculture (USDA). The data are not official USDA data.

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Executive Summary

The 2025 stone fruit harvest in the European Union (EU) has been marked by adverse weather, which has reduced production potential across the region. In addition to weather challenges, EU stone fruit producers face regulatory costs related to plant health, environmental regulations, and packaging requirements. These factors directly impact production margins. Labor shortages, particularly during harvest, and generational renewal continue to drive farmers' investment decisions, driving a shift towards crops which could be harvested mechanically.

Considering the reduced supply in the EU and from its main external suppliers, stone fruit consumption is expected to contract. This contraction is expected to persist despite the higher-than-average early summer temperatures that typically favor consumption.

The EU remains a net exporter of peaches with exports largely exceeding imports. However, the anticipated reduction in domestic availability is likely to reduce the volume available for export. In the case of cherries, the EU is largely reliant on the Turkish supply, whose export volumes to the EU are projected to contract.

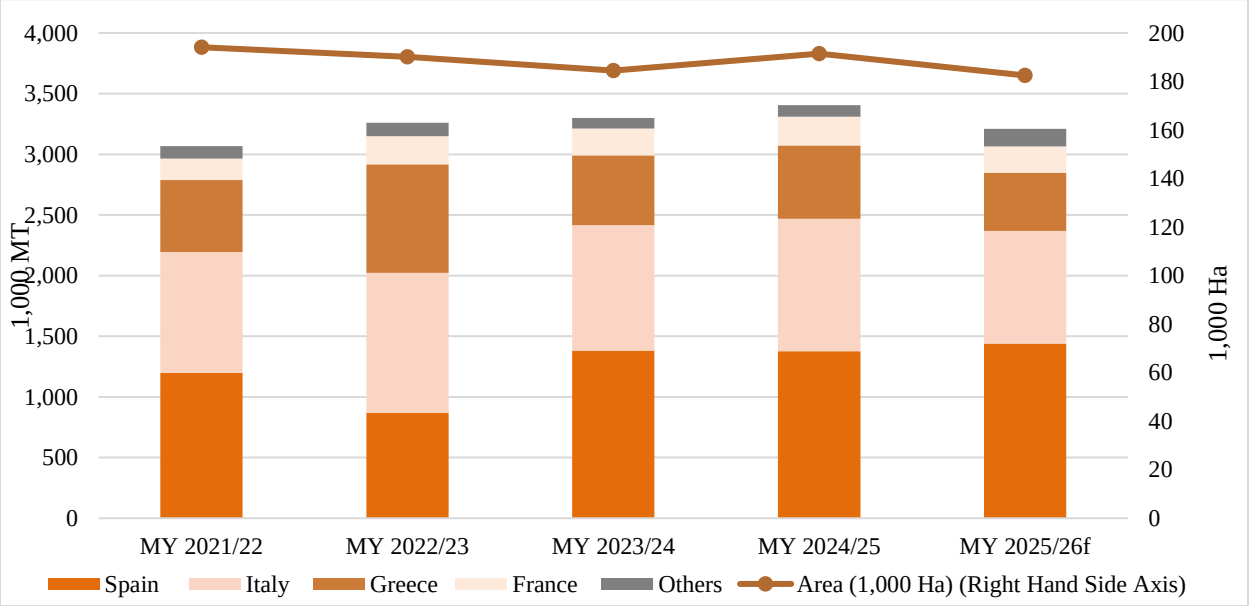
Fresh Peaches & Nectarines

Table 1. Production, Supply, and Distribution Data Statistics

Peaches & Nectarines, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jan 2023		Jan 2024		Jan 2025	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	191,306	184,510	189,310	191,460		182,500
Area Harvested (HA)	170,889	164,743	174,424	158,664		162,250
Production (MT)	3,424,503	3,299,000	3,625,724	3,406,000		3,120,000
Imports (MT)	47,600	47,585	50,000	58,670		53,400
Total Supply (MT)	3,472,103	3,346,585	3,675,724	3,464,670		3,173,400
Domestic Consumption (MT) [1]	3,335,503	3,208,001	3,475,724	3,322,824		3,073,400
Exports (MT)	136,600	138,584	200,000	141,846		100,000
Total Distribution (MT)	3,472,103	3,346,585	3,675,724	3,464,670		3,173,400
(HA), (1000 TREES), (MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: FAS EU offices.

Figure 1. EU Peaches and Nectarines Planted Area and Production



Source: FAS EU Posts estimates based on Member States statistical sources.

MY 2025/26 EU area planted for peaches and nectarines is estimated at 182.5 thousand Hectares (Ha). Last year's increase in area planted notwithstanding, area allocated to peaches and nectarines continues to trend down, although at a slower pace than in previous seasons, as farmers switch towards more profitable alternative tree crops such as tree nuts.

[1] The values of "For Processing" and the negligible volumes "Withdrawn from Market" have been added to the attribute "Domestic Consumption".

In MY 2025/26, EU production is projected to fall below last season's levels, amounting to 3.1 million metric tons (MT). The largest producers of peaches and nectarines in the EU include Spain, Italy, Greece, and France. To a lesser extent, production also exists in Hungary, Portugal, Bulgaria, and Poland.

Spain, the EU's largest peach and nectarine producer, expects MY 2025/26 production below last year's levels, given the unfavorable weather conditions, particularly at the end of the season. Abundant precipitation and hail lowered initial production expectations, with hail causing fruit cracking during formation. In the Ebro Valley, Aragon is expected to produce less than last year's drought-hit levels, while Catalonia and Murcia also project declines due to hail damage. Initially, spring rains restored soil moisture and filled reservoirs, ensuring irrigation and good fruit sizes. Mild spring temperatures supported flowering with minimal frost damage, though fruit development was slightly delayed. Warmer temperatures in late May helped offset this delay. However, farmers remain cautious about the impact of excessive rainfall and early summer hail episodes on plant health and fruit quality and quantity.

According to the National Service Center of Fruit and Horticultural Companies (CSO), Italy's MY 2025/26 peach and nectarine production is expected to remain at levels very similar to the previous season. While localized frost damage occurred in some growing areas and is likely to reduce yields in those locations, the overall impact on national production is anticipated to be limited. In contrast, the MY 2025/26 cling peach harvest is forecast to fall below last season's levels.

Greece's MY 2025/26 peach and nectarine production is forecast to significantly decrease compared to MY 2024/25, due to adverse spring weather conditions. While fruit quality is expected to remain good, some varieties were affected by poor fruit-set, and average fruit size are smaller than usual.

French peaches and nectarines production in MY 2025/26 is expected below previous season levels and slightly down from the five-years average. Numerous thunderstorms in the southern half of the country caused significant losses in orchards. Additionally, peach and nectarine orchards continue to slowly decline due to poor economic conditions for producers in recent years combined with losses of trees due to the Sharka disease (Plum pox).

Hungary's peach sector faced severe challenges in MY2025/26, due to harsh spring weather as early spring frosts and prolonged cold periods devasted crop prospects, and producers are preparing for potentially the worst season on record. The cold wave during the flowering period affected most of the country's fruit-growing areas, while the fungal disease of *Taphrina deformans* further damaged peach orchards.

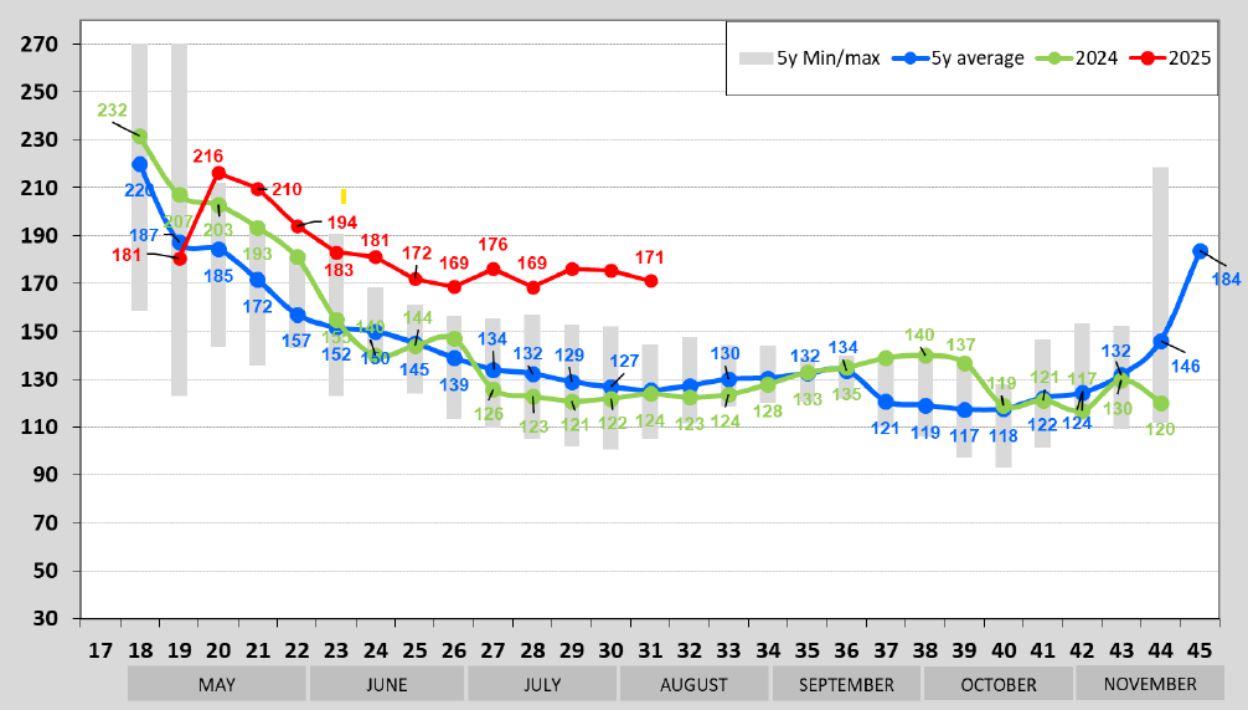
In Poland, severe frosts in April and early May, interspersed by warmer days, caused significant damage to flowers and fruit. Low temperatures also reduced pollinator activity. Frost damage varied widely across the country, complicating harvest forecasts. May 2025 was unusually cold, with soil temperatures as low as minus 7°C in northern regions. The short flowering and pollination period, combined with persistent cold and lack of rainfall, negatively impacted fertilization and plant protection.

Adverse weather events in Portugal, including cold weather and rainfall during flowering, hampered pollination and negatively impacted fruit-setting. As a result, MY 2025/26 yields are expected at below previous season's levels.

In Bulgaria, severe weather in MY 2025/26 devastated stone fruit production. Freezing temperatures in February and April caused widespread blossom loss and prevented pollination. Producers faced very significant losses, with peaches slightly less affected than cherries. Improved weather in May and June came too late for recovery, and production estimates remain tentative pending final data.

According to EU Peaches and Nectarines Dashboard, the 2025 season for peaches started off at significantly lower price levels (181 Euros/100 Kg) than the five-year average (see Figure 2). However, prices soon corrected upward, exceeding five-year average given the lower availability of fruits in main competitor suppliers such as Türkiye and steady demand.

Figure 2. Current EU Peach Prices (€/ 100 kg)

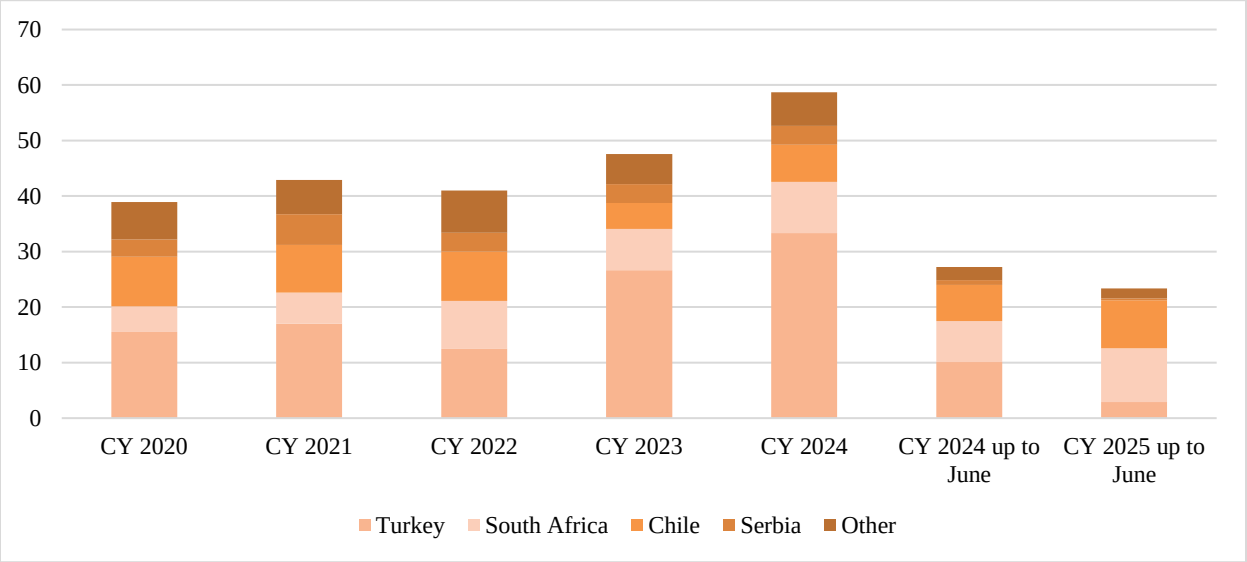


Source: EU Peaches and Nectarines Dashboard.

In MY 2025/26, consumption of peaches and nectarines in the EU is projected to decline given the reduced domestic production. In addition, higher prices may disincentivize consumption for the EU's most price-sensitive consumers. The quantity of peaches and nectarines used for processing - mainly in Spain and Greece, the EU's major fruit processing producer – is expected to decrease, in line with the reduced availability.

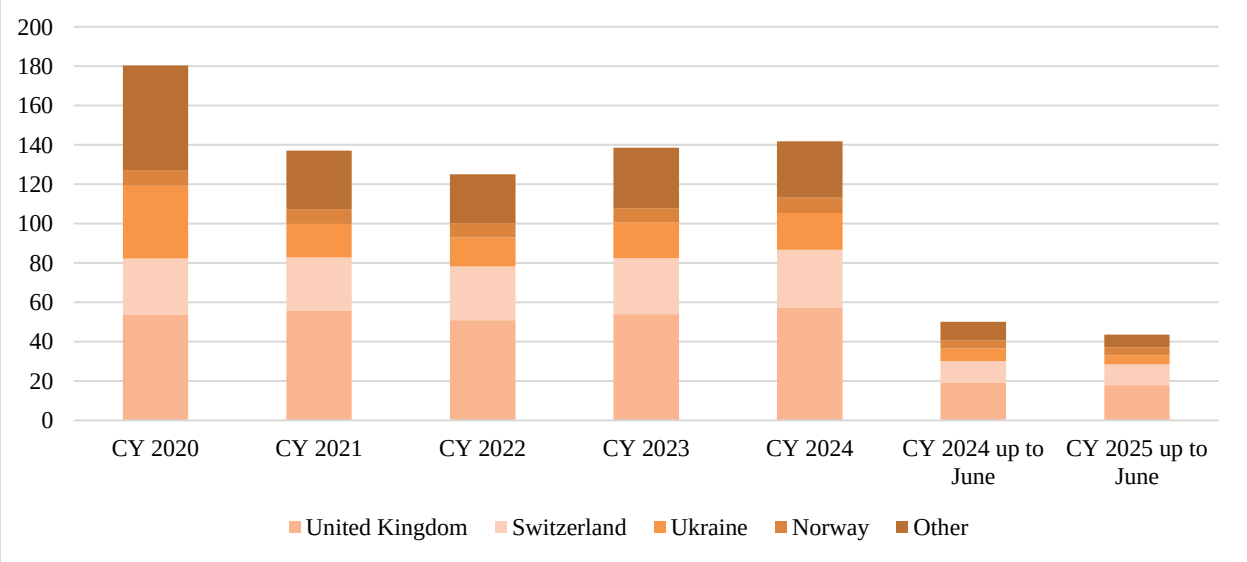
Despite production challenges the EU remains a net exporter of peaches and nectarines with exports largely exceeding imports. Notably, for MY 2025/26, despite the reduction in domestic production, import volumes are also expected to be down given the reduced availability from main trading partners such as Türkiye (Figure 3). Frosts reported in stone fruit-producing eastern member states as well as in Türkiye are expected to create market opportunities for western EU producers, such as Spain and Italy, whose production has been relatively more stable . EU peaches and nectarine exports, which largely target markets in the United Kingdom, Switzerland, Ukraine, and Norway are also projected below the previous season (Figure 4).

Figure 3. EU Imports of Fresh Peaches & Nectarines by Origin and (1,000 MT)



Source: Trade Data Monitor LLC.

Figure 4. EU Exports of Fresh Peaches & Nectarines by Destination (1,000 MT)



Source: Trade Data Monitor LLC.

Fresh Cherries (Sweet and Sour)

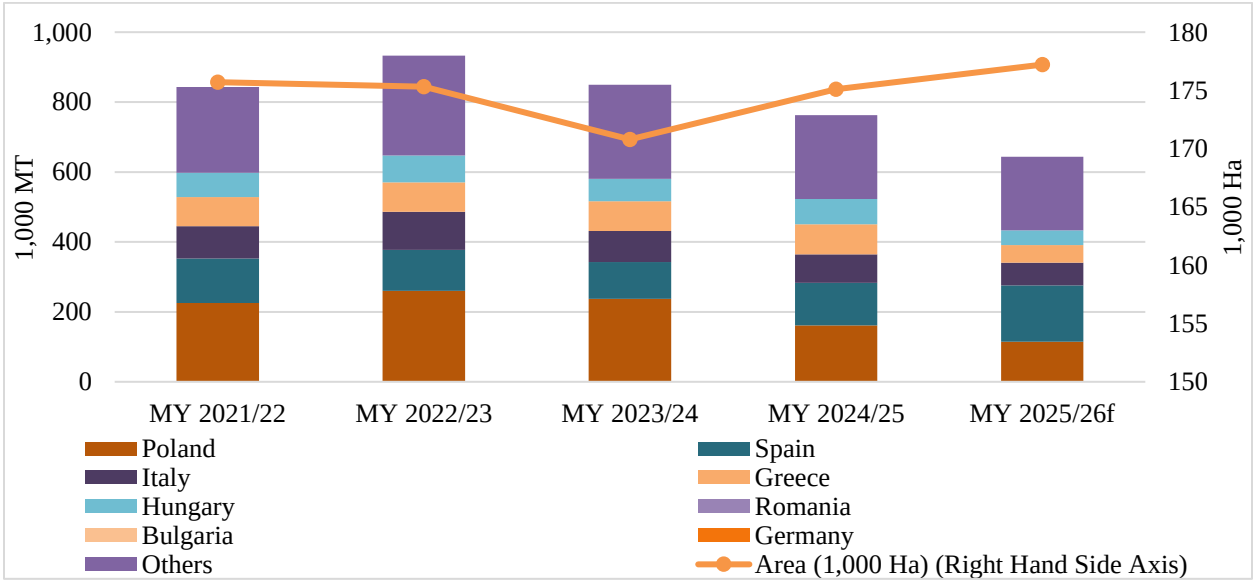
Table 2. Production, Supply, and Distribution Data Statistics

Cherries (Sweet & Sour), Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Apr 2023		Apr 2024		Apr 2025	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	160,607	170,800	159,892	175,110		177,500
Area Harvested (HA)	154,189	153,782	153,093	151,301		159,300
Production (MT)	704,822	849,630	715,346	762,260		644,100
Imports (MT)	57,900	57,914	60,000	57,915		30,000
Total Supply (MT)	762,722	907,544	775,346	820,175		674,100
Domestic Consumption (MT) [2]	750,622	895,210	760,346	808,425		665,200
Exports (MT)	12,100	12,334	15,000	11,750		8,900
Total Distribution (MT)	762,722	907,544	775,346	820,175		674,100
(HA), (1000 TREES), (MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: FAS EU offices.

According to Post projections for MY 2025/26, EU cherry area will continue the recovery initiated in MY 2023/24. This is almost entirely attributed to the larger area projections in Spain, whereas cherry acreage in other producing EU member states remains stable or declines marginally.

Figure 5. EU Cherry Planted Area and Production



Source: Eurostat and FAS EU Posts estimates based on Member States statistical sources.

[2] The values of "For Processing" and the negligible volumes "Withdrawn from Market" have been added to the attribute "Domestic Consumption".

Total EU cherry production in MY 2025/26 is projected to decline compared to last year's levels and amount to 647 thousand MT down from the 764 thousand MT output harvested in 2024. In 2025, the production declines in France, Hungary, Italy and Poland push the overall EU output forecast down, offsetting the improved production levels expected in Spain, Germany and Portugal.

Poland's MY 2025/26 total production for sweet and sour cherries is forecast at 115,000 MT, an almost thirty percent decrease from last year and a fifty-three percent decrease from the six-year average. Production is expected to consist of 80,000 MT of sour cherries and 35,000 MT of sweet cherries. Frosts in mid-April 2025 significantly reduced yields, with early fruit varieties suffering the most. This will delay the arrival of new fruit harvest on the market. For several years now, Poland's sour and sweet cherry yields have not reached their full potential due to unfavorable weather conditions including cold, drought, and/or or hail.

Italy's cherry production for MY 2025/26 is preliminarily forecast to decline compared to the previous season. The drop is primarily due to a sharp reduction in output in Puglia caused by frost events in April and May.

In Spain, cherry production for MY 2025/26 is expected to exceed MY 2024/25 levels. However, abundant precipitation delayed cherry tree flowering, resulting in a two-week delay in market availability. Unlike the two previous seasons marked by dry and hot springs, abundant precipitations and mild temperatures prevailed in spring 2025. Mild winter temperatures in some regions resulted in insufficient chill-hours required for cherry trees. In Aragon, which accounts for 40 percent of the country's total output, favorable weather conditions prevailed despite the storm and hail episodes registered across the Ebro Valley. Other large cherry-producing regions such as Extremadura and Catalonia are reporting good output levels.

Greece's MY 2025/26 cherry production is forecast to significantly decrease, with an approximate 45 percent drop compared to last season due to adverse weather conditions in spring.

Bulgaria's MY 2025/26 sweet and tart cherry production was severely impacted by adverse weather. February's freezing temperatures, reaching as low as -20°C in key regions, caused damage to orchards, particularly in the northeast. Early blossoming in March and April, triggered by mild weather, was followed by a cold spell with snow and freezing temperatures. Rainy and cool conditions and lack of pollinators further exacerbated the situation. Producers faced massive losses, with sweet cherry production declining by 92 percent and tart cherry production by 97 percent. Harvested areas and yields have plummeted, and fruit quality has suffered. While May and June weather improved, recovery was impossible. Industry estimates suggest losses of 50–100 percent, with further downward adjustments possible as final data becomes available.

German cherry production is expected to rebound this season after a very low production in MY2024/25. Based on crop assessments carried out on June 10, the German Federal Office of Statistics (*Destatis*) estimates German cherry production for MY 2025/26 at approximately 41,900 MT[3]. If this materializes, it would be a 41 percent increase compared to the very low production of the preceding season, and a 10 percent improvement on the ten-year (2015-2024) average. This increase in the anticipated harvest volume is largely the result of favorable weather conditions at time of pollination and the absence of late spring frosts and heavy rain. Sweet cherry production is estimated at 38,170 MT and sour cherries at 11,730 MT. In MY 2024/25, production amounted to 35,373 MT, including 27,894 MT of sweet cherries and 7,479 MT of sour cherries. This is substantially lower than forecast a year ago and the result of summer thunderstorms with heavy rain and hail that damaged the crop right before the harvest.

The MY 2025/26 cherry crop in France is expected to slightly decrease from 2024 levels. Rainfall and local hailstorms in May damaged the early varieties in Rhone Alpes. In other regions, wet weather increased insect infestations especially from *Drosophila Suzukii*. Hot weather in late June sped up the harvest which was over in most regions by early July.

For the second consecutive season, in MY 2025/26, adverse weather conditions in Portugal cherry orchards were negatively affected by low temperatures and excessive precipitation during flowering and fruit setting. While MY 2025/26 cherry output in Portugal is expected to exceed the extremely poor harvest obtained in MY 2024/25, the country's cherry production is expected to stay well-below the five-years average.

In Hungary, this year's sour cherry harvest is expected to be the weakest in decades. The cold wave and severe frost damage in April particularly affected early varieties, and losses were also significant in the case of late varieties. Due to the heterogeneity of cherry harvest conditions, it is difficult to give an accurate estimate. Based on current conditions, domestic sour cherry production is estimated at 35,000 MT.

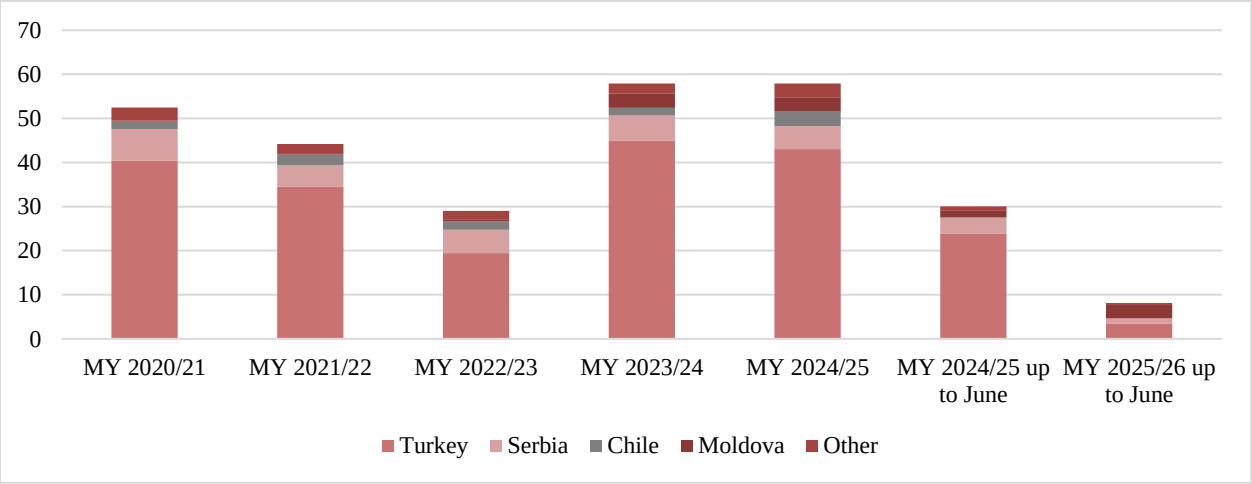
EU consumption of cherries in MY 2024/25, including cherries for processing, is expected to decline as availability curbs domestically and in main EU trading partners. Southern EU member states (Spain, Italy, Greece, Portugal and France), along with Germany, are the EU's largest consumers of fresh sweet cherries. Sour cherries, largely produced in northern and central EU producing member states, are mainly used by the processing industry for frozen fruits, juice concentrates, jams or marmalade, and spirits production.

In April 2025, the EU launched and co-funded a three-year program "Naturally Cherrylicious" with the aim to promote the quality, sustainability and traceability of domestically produced cherries in EU markets such as Spain, Sweden and Finland. This initiative is expected to contribute to sustain cherry consumption in the targeted EU Member States.

[3] https://www.destatis.de/DE/Presse/Pressemitteilungen/2025/06/PD25_230_412.html. Published on June 27, 2025, and based on a crop on June 10, 2025

After hitting record levels in MY 2023/24 and MY 2024/25, data available for EU imports of cherries during the first five months of the calendar year shows a significant contraction. The EU is a net importer of cherries, with Türkiye accounting for nearly 70 percent of EU imports. Other relevant suppliers include Serbia, and Chile and Argentina during the off-season.

Figure 6. EU Imports of Fresh Cherries (Sweet & Sour) by Origin (1,000 MT)

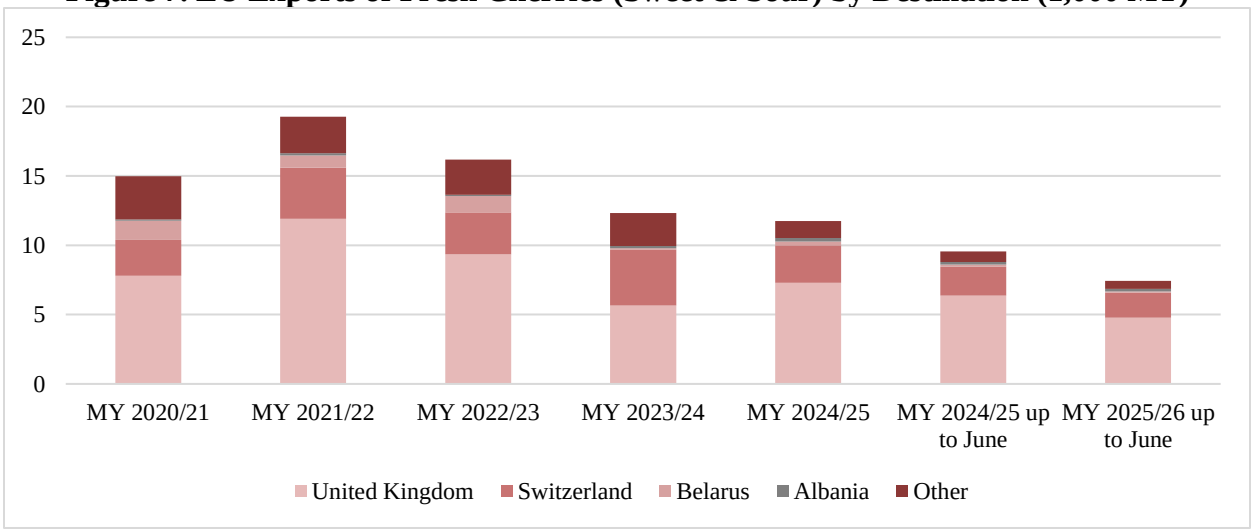


Source: Trade Data Monitor LLC.

In MY 2025/26, EU cherry exports are projected to be somewhat below previous season, due to shortfall in domestic production. Main cherry export destinations outside of the EU include United Kingdom, Switzerland, Belarus and Albania.

China granted market access for Spanish cherries in spring 2025, opening new opportunities for EU cherries exports in MY 2025/26. The export protocol to China requires that the fruit be kept at a low temperature for at least 15 days prior to entering China. This requirement may drive varietal adaptation and modifications to harvesting schedules to ensure the fruit reaches China at its optimum ripening stage.

Figure 7. EU Exports of Fresh Cherries (Sweet & Sour) by Destination (1,000 MT)



Source: Trade Data Monitor LLC.

Policy

Marketing Standards

Fresh fruit and vegetable imports into the EU must comply with EU-harmonized marketing standards. These standards apply to 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 stone fruits, such as peaches and nectarines, and are set out on pages 45-48 in Delegated Regulation 2023/2429.

EU Agricultural Promotion Policy

Since 2001, EU farmers have benefited from agricultural promotion programs under the Common Agricultural Policy. Current programs are regulated by Regulation (EU) 1144/2014which includes the "Enjoy! It's from Europe" initiative. This program adopts annual work programs that set out strategic priorities for promotion measures in terms of products, schemes, target markets, and available resources.

On December 13, 2024, the European Commission announced the allocation of €132 million (approximately $138 million) towards promotion activities for EU agri-food products in 2025. One of the priorities of the Commission is to focus on healthy and balanced diets with €12.7 million earmarked to stimulate the consumption of fresh fruit and vegetables in the European Union.

Maximum Residue Levels (MRLs) for Stone Fruits and 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 EU Early Alert report provides interested stakeholders with advance notice of active substances under review for renewal of approval in the EU as well as those listed with a U.S. MRL. Active substances with MRLs that are being reviewed under Article 12 of Regulation (EU) 396/2005 can be found here.

Captan is an active substance used as a fungicide on a variety of fruits, including stone fruit. Captan has been renewed, under Regulation (EU) 2024/2186, as of November 1, 2024. This renewal, valid until 2039, limits captan application to non-flowering periods and mandates the use of precision application equipment to reduce pesticide use. With the restriction of approval for captan, MRLs could be impacted in the future.

Tariffs

- **Entry Price System**: EU imports of fresh fruit and vegetables are subject to the Entry Price System, which has been in place in its current form since the Uruguay Round. It is a complex tariff system that provides a high level of protection to EU producers. In this system, fruits and vegetables imported at or above an established entry price are charged only an ad valorem duty. The tariff and statistical nomenclature and the Common Custom tariff levels for 2025 are published in Commission Implementing Regulation (EU) 2024/2522. This version took effect as of January 01, 2025. The tariffs for stone fruits can be found on pages 909 to 918.

- **First Come, First Served Principle:** Regarding the administration of import tariff quotas, certain types of stone fruit are subject to the "first come, first served" principle:

Product	Tariff code				Quantity (Kg)	Tariff quota Period	Origin	In-Quota Duty
Fresh (sweet) cherries	0809 29 00				15,100 Kg	June 16-July 15	All third countries except the UK	4 percent *ad valorem*
Preserved fruit including apricots, cherries, and peaches	2008 20 11	2008 40 11	2008 50 51	2008 70 31	2,820,000 Kg	January 1-December 31	All third countries	20 percent *ad valorem*
	2008 20 19	2008 40 19	2008 50 59	2008 70 39				
	2008 20 31	2008 40 21	2008 50 71	2008 70 51				
	2008 20 39	2008 40 29	2008 60 11	2008 70 59				
	2008 20 71	2008 40 31	2008 60 19	2008 80 11				
	2008 30 11	2008 40 39	2008 60 31	2008 80 19				
	2008 30 19	2008 50 11	2008 60 39	2008 80 31				
	2008 30 31	2008 50 19	2008 60 60	2008 80 39				
	2008 30 39	2008 50 31	2008 70 11	2008 80 70				
	2008 30 79	2008 50 39	2008 70 19					

Source: TARIC, European Commission.

EU Policy Response to Russia - Ukraine Conflict

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

Until June 5, 2025, 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. Since June 6, 2025, the EU-Ukraine trade relationship reverted to the 2014 Deep and Comprehensive Free Trade Area (DCFTA). Transitional measures will apply through the end of 2025, reinstating quotas on sensitive agricultural products, which do not include stone fruits.

Russian Ban on Agricultural Products

On August 7, 2014, the Russian government implemented a (then) one-year ban on a range of agricultural and food products, including stone fruits, from the United States, the EU, Canada, Australia, and Norway, in response to U.S. and EU sanctions over Russian actions in Ukraine. Russia has continued to extend the ban every year. The Commission introduced specific market support measures for the European fruit and vegetable sector from the start of the ban in 2014 until 2017. The emergency measures for fruit and vegetables were phased out on June 30, 2018. Overall, the EU granted $588 million (€500 million) of aid to EU producers of fruit and vegetables corresponding to 1.7 million tons of withdrawals from the market.

Free Trade Agreements affecting stone fruit exports to the EU

The EU is negotiating and has implemented several Free Trade Agreements (FTAs) with other countries and regions such as major EU stone fruit partners. Chile, Türkiye, Morocco, the UK, Canada, which include concessions on food products. Additional information is available on the website of the EC at: EU Trade agreements (europa.eu)

Certification of Fruit Shipments

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 7, 2022. There is more information available on the DG SANTE website: Reduced frequency checks.

Trade Shows

Trade shows 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 sector in the EU include:

FRUIT ATTRACTION Madrid, Spain (Interval: yearly) Target Market: Spain/EU/International Fruit attraction is an international trade show for the fruit and vegetable industry sector with more than 1,600 exhibitor companies from around the world. http://www.fruitattraction.com	Next Edition: September 30-October 2, 2025
FRUIT LOGISTICA Berlin, Germany (Interval: yearly) Target Market: Germany/EU/Central & Eastern Europe FRUIT LOGISTICA is the leading European trade show for fresh and dried fruit, nuts, and related products. https://www.fruitlogistica.de/en/	Next Edition: 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	Next Edition: February 10-14, 2026

Abbreviations and References

CAP	Common Agricultural Policy
CY	Calendar Year
EC	European Commission
EU	European Union
€	Euro
FAS	Foreign Agricultural Service
HA	Hectares
LOD	Limit of detection
TDM	Trade Data Monitor, LLC
MY	Marketing year
MS	EU Member State
MRL	Maximum Residue Levels
MT	Metric ton (1,000 kg)
MMT	Million Metric Tons
PS&D	Production, Supply and Distribution
(SC)PAFF	Standing Committee on Plants, Animals, Food and Feed
S1	First Semester on CY basis
UK	United Kingdom
U.S.	United States
$	U.S. Dollar

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.

Harmonized System (HS) Codes:
Peaches and nectarines HS Code 080930
Cherries HS Code 080921, 080929

Marketing year:

Peaches and nectarines	January/December
Cherries	April/March

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Mira Kobuszynska	FAS/Warsaw covering Poland
Sabine Lieberz	FAS/ Berlin covering Germany
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Attachments:

No Attachments