Required Report: Required - Public Distribution **Date:** November 04, 2026

Report Number: E42026-0090

Report Name: Fresh Deciduous Fruit Annual

Country: European Union

Post: Berlin

Report Category: Fresh Deciduous Fruit

Prepared By: Sabine Lieberz, Marcel Pinckaers, Ornella Bettini, and Sophie Bolla

Approved By: Matthew Snyder

Report Highlights:

EU commercial apple and pear production in Marketing Year (MY) 2026/27 is forecast at 9.8 million metric tons (MMT) and 1.88 MMT, respectively. This is a decrease of 13.5 percent for apples and an increase of 2 percent for pears compared to the previous year. If materialized this would be the second-smallest production in the past decade for apples and the fifth-smallest for pears. EU commercial table grape production is forecast to increase by 4 percent to 1.59 MMT.

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

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**.

This report was a group effort of the following FAS analysts:

Xavier Audran	FAS/Paris covering France
Tania De Belder	USEU/FAS Brussels covering Belgium and Luxemburg
Ornella Bettini	FAS/Rome covering Italy
Sophie Bolla	USEU/FAS Brussels covering EU policy
Mila Boshnakova	FAS/Sofia covering Bulgaria
Monica Dobrescu	FAS/Bucharest covering Romania
Dimosthenis Faniadis	FAS/Rome covering Greece
Jana Fischer	FAS/Prague covering Czechia and Slovakia
Gellert Golya	FAS/Budapest covering Hungary
Mira Kobuszynska	FAS/Warsaw covering Poland, Lithuania, and Latvia
Sabine Lieberz	FAS/Berlin covering Germany, Austria, and Slovenia
Jonathan Little	FAS/London covering Ireland
Arantxa Medina	FAS/Madrid covering Spain and Portugal
Andreja Misir	FAS/Zagreb covering Croatia
Marcel Pinckaers	FAS/The Hague covering the Netherlands, Denmark, Finland, and Sweden

The chapters were coordinated and written by:

Overall coordination	Sabine Lieberz
Apples	Sabine Lieberz
Pears	Marcel Pinckaers
Table Grapes	Ornella Bettini
Policy	Sophie Bolla

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 2026.

Table of Contents

Executive Summary 5
Apples 5
Pears 5
Table Grapes 5
Overarching Challenges for EU Fruit Farmers 5
Adverse Weather Conditions 5
Shortage of Labor and Labor Costs 6
Lack of Plant Protection Substances and Restrictions on Pesticide Use 6
Lack of Successors 6
Impact of Geopolitical Conflicts 6
Lower Consumption of Apples and Pears 7
Section I: Apples 8
Section II: Pears, Fresh 21
Section III: Table Grapes 29
Section IV: Policy 34
Common Agricultural Policy 34
Marketing Standards 34
Maximum Residue Levels (MRLs) 35
Certification of Fruit and Vegetables 35
Trade 36
Other Trade Agreements Affecting Fresh Deciduous Fruits Trade in the EU 37
Section V: Trade Fairs 39
Section VI: Related Reports 40

Executive Summary

Apples

Commercial apple production in Marketing Year (MY) 2026/27 (July/June) is forecast at 9.8 million metric tons (MT), a decrease of 13.5 percent compared to the previous year. If materialized, this would be the second-lowest production in the past decade. This is mainly a result of spring drought and multiple heat periods in the majority of member states; particularly pronounced in Poland, France, Germany and Central Europe. Since 2014, U.S. apple exports to the EU have remained low due to EU technical trade barriers associated with using *morpholine* as an additive in waxes, and *diphenylamine* (DPA) – a post-harvest treatment for storage scald. The EU is a competitor for U.S. apple exports in markets like Saudi Arabia, the United Arab Emirates (UAE), and India.

Pears

EU commercial pear production is estimated at 1.88 MMT, a slight increase over MY 2025/26 due to better yields but still the fifth-smallest harvest in the past decade. After a decline over many years, harvested area seems to be stabilizing just below 95,000 hectares. While production is recovering in several major producing countries, output remains below potential in parts of the EU due to declining orchard area, phytosanitary challenges, and increasingly variable weather conditions. An estimated 277,665 MT of pears will be diverted to processing. EU pear consumption (including for processing) is expected to remain weak in MY 2026/27 at 1.76 MMT, with younger consumers increasingly choosing other fruits and snack products. EU pear imports are expected to decline slightly due to higher domestic production, while exports are forecast to remain broadly stable, with the UK remaining the main export market.

Table Grapes

MY 2026/27 (June/May) EU table grape commercial production is forecast up 4 percent from the previous season totaling 1.59 million MT. Except for France, where output will likely decrease primarily due to prolonged drought and heat stress, volumes are anticipated to increase in all major grape-producing member states due to generally favorable growing conditions. The largest increase in volume is projected for Italy, driven by good crop potential and new, productive seedless vineyards entering production. Overall, fruit quality is reported as good to very good, with high sugar levels in several producing areas. 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. In 2026, spring drought and multiple heat periods negatively affected production in most member states, with the exception of Spain and Portugal. Additionally, sunburn has become an issue even in 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 four 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 our report of 2024).

Houthi attacks on commercial vessels in the Red Sea have 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.

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

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	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jul 2024		Jul 2025		Jul 2026	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	466,300	460,790	461,000	456,350		450,000
Area Harvested (HA)	442,660	443,530	440,500	436,544		430,500
Commercial Production (MT)	10,701,389	10,727,261	10,736,220	11,367,988		9,832,600
Non-Comm. Production (MT)	835,380	827,531	784,800	789,505		750,800
Production (MT)	11,536,769	11,554,792	11,521,000	12,157,493		10,583,400
Imports (MT)	270,300	270,251	265,000	231,911		265,700
Total Supply (MT)	11,807,069	11,825,043	11,786,020	12,389,404		10,849,100
Domestic Consumption (MT)	10,834,669	10,852,430	10,811,020	11,217,290		9,878,900
Exports (MT)	972,400	972,613	975,000	1,172,114		970,200
Total Distribution (MT)	11,807,069	11,825,043	11,786,020	12,389,404		10,849,100
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Not official USDA data. Sources: Area planted for MY 2024/25 and 2025/26: Eurostat; trade for MY 2024/25 and 2025/26: Trade Data Monitoring, LLC (TDM) accessed in September 2026; All other: FAS EU posts

Apples - Commercial Production[2]

The EU is one of the leading producers and consumers of apples worldwide. 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 1.4 percent in MY 2026/27 with reductions mostly occurring in Spain, Poland, Belgium, France, Germany, Hungary, the Netherlands, and Czechia. Smaller reductions (less than 100 ha) were recorded in Slovenia, and Italy. The decline reflects low profitability, increasing constraints on water and pesticide use, high replanting costs, limited generational succession, and the gradual removal of less productive orchards. Additionally, apple area is reduced in favor of other fruits, mainly pears (Poland) and cherries (Poland and Spain). In Bulgaria, Lithuania, and Greece, the harvested area rebounded from the previous MY to more normal levels. Latvia and Denmark are the only countries that recorded an expansion of harvested area exceeding long-term levels.

Production

Commercial apple production[3] in MY 2026/27 is forecast to significantly drop by 13.5 percent compared to the previous year due to poor growing conditions. If materialized, this would be the second-lowest production level in the past decade.

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 and May especially affected Poland, Czechia, Slovakia, Hungary, and Romania. Summer heat and drought were more pronounced than in average years and affected a variety of member states, particularly Poland and France. It resulted in smaller fruits, caused sunburn and early fruit drop, and hurt quality. Hail damage occurred in the Netherlands, Belgium, northern Germany and Czechia.

In absolute terms production decreases are highest in Poland, Germany, France, Czechia, Austria, and Belgium. While production is forecast to increase or rebound in Greece, Spain, and Lithuania, and to a lower extent in Bulgaria, Slovenia, Croatia, and Slovakia, the combined increase is not sufficient to compensate for the reduction elsewhere.

MY2025/26 production was revised up due to changes in official data from member states, mainly due to larger-than-expected fruit sizes. Production was higher than originally estimated in all member states but Greece, Portugal, Bulgaria, Romania, Latvia and the Scandinavian countries. The largest upward revisions occurred in Poland and Germany. The higher production resulted in lower imports and higher exports than previously expected.

[3] Note: This production estimate deviates from the estimate that the World Apple and Pear Association (WAPA) issued. This is partly because for some member states WAPA only accounts for part of the production (e.g., only Styria for Austria) and partly because the WAPA estimate reflect the situation in July while our estimates were compiled in September

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 2024 (latest available data), the six member states with the largest organic apple acreage were France, Germany, Italy, Poland, Hungary, and Romania, together accounting for 83 percent of organic apple area.

At Prognosfruit,[4] EU organic production was forecast to decrease to 544,000 MT compared to 630,000 MT in 2025 mostly because of weather-related challenges. This takes the organic sector's share of total EU commercial apple production marginally down to 5.53 percent (compared to 5.54 percent in 2025).

[4] 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	2024/25	2025/26	2026/27	Change 2025/26 to 2026/27	Share of Total Production in 2026/27
Poland	3,300,000	3,800,000	**2,900,000**	-24%	29%
Italy	2,326,855	2,319,183	**2,269,100**	-2%	23%
France	1,627,260	1,603,800	**1,375,000**	-14%	14%
Germany	871,992	1,137,829	**890,600**	-22%	9%
Spain	474,629	469,500	**525,000**	12%	5%
Romania	370,000	339,111	**318,000**	-6%	3%
Portugal	313,210	282,110	**280,000**	-1%	3%
Greece	245,000	200,000	**280,000**	40%	3%
Netherlands	194,000	236,000	**190,000**	-19%	2%
Belgium	160,000	222,000	**166,000**	-25%	2%
Austria	103,955	192,627	**125,000**	-35%	1%
Hungary	351,265	183,810	**140,000**	-24%	1%
Croatia	67,706	59,000	**64,000**	8%	1%
Czechia	37,487	122,764	**51,000**	-58%	1%
Lithuania	70,000	14,000	**50,000**	257%	1%
Slovenia	50,654	36,388	**42,000**	15%	0.4%
Slovakia	33,647	34,366	**36,400**	6%	0.4%
Bulgaria	34,830	20,000	**34,000**	70%	0.3%
Sweden	32,000	32,000	**32,000**	0%	0.3%
Denmark	21,000	24,000	**25,000**	4%	0.3%
Ireland	18,600	24,500	**21,500**	-12%	0.2%
Latvia	14,000	7,000	**10,000**	43%	0.1%
Finland	9,171	8,000	**8,000**	0%	0.1%
Total	**10,727,261**	**11,367,988**	**9,832,600**	**-13.5%**	

e= estimated; Note: The table is grouped by ranking in MY 2026/27. Due to rounding, percentages add up to marginally more than 100 percent. Source: FAS EU posts

Member State Specific Production Information

- In Poland, production is anticipated to decline due to lower yields and lower area. However, crop conditions vary greatly depending on location and apple variety. Drought and heat during the summer have resulted in the fruit being smaller than usual.
- In Italy the projected overall decline masks different developments in the various regions. Production is forecast to decrease by 2 percent in Alto Adige and 9 percent in Trentino, while most other producing regions are expected to increase production, including by 2 percent in both Piedmont and Veneto, 6 percent in Emilia-Romagna, and 9 percent in Friuli-Venezia Giulia. Overall fruit quality and sizing are expected to be good, supported by favorable spring weather conditions.

- French apple production is expected to sharply decline (by 13 percent) from MY 2025 and 5 percent below the five-year average. The decline is mainly due to unfavorable weather conditions since the spring, starting with excessive rain at flowering, followed by five consecutive heatwaves and a severe drought through most of France, combined with the slow decline in production areas (as older orchards are not replaced). The physiological losses were severe and fruits are much smaller than average due to drought. Farmers in most regions had difficulties controlling pests, citing French-only regulations that go beyond EU restrictions.
- Spain expects production to not only increase compared to the previous year but also surpass the previous decade's average production by 5 percent driven largely by growth in Catalonia.
- Germany expects a decrease of production related to drought (smaller fruit sizes) and hail damage. Some of the smaller fruit may be diverted directly to processing or not be harvested at all. 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, 2026, the minimum wage (which also applies to seasonal labor) increased by 46 percent, albeit in installments from 9.50 Euro to 13.90 Euro per hour. The next increase to 14.60 Euro will occur on January 1, 2027.
- In Romania, the situation varies significantly by region. Overall production is forecast to fall by 3 percent in 2026 and total 14 percent below the 5-year average .Apple production is concentrated in the southern and north-western regions, which jointly account for nearly half of the national apple production. Here the weather conditions were in general favorable. In contrast, successive late frost episodes in April, and even the beginning of May, affected orchards especially in the western and central parts of the country. These areas also faced a significant water deficit, which together with summer heat waves, reduced the potential for sizable fruits. Nevertheless, a recovery in other productive areas, such as the south and northeast, are anticipated to offset reductions in the north-western region.
- In Portugal, floods during the dormancy season did not damage trees; instead, they improved soil water reserves, supporting fruit set and size. Portuguese apple quality is excellent. The absence of prolonged extreme heat during the critical fruit-filling and coloring phases has supported strong blush development and preserved firmness.
- In Greece, apple production is forecast to rebound after a low production year. Spring weather favored fruit set and fruit development, however extensive heat and dry weather in August in Central Greece reduced the yields for some varieties. Quality is expected to be very good.
- In the Netherlands, flowering and fruit set were strong, but drought from mid-June to mid-August negatively affected fruit development and yields, particularly in the southern Netherlands. Conditions improved from mid-August, with cooler temperatures and sufficient rainfall. Processing volumes are expected to rise significantly to around 29,000 MT (15 percent of production), due to the drought, hail and other issues affecting quality. It is also still unclear to what extent sunburn and black fruit rot will occur and whether the storage quality of the fruit may be lower this year.

- In Belgium, the projected decrease in production of around 25% below the previous season and about 22% below the five-year average is mainly due to the continued reduction in cultivated area, as well as persistent drought and heat. The share of harvested apples destined for industrial processing is expected to increase significantly because of hailstorms, which have damaged large parts of the crop.
- Hungary expects its smallest apple crop in 50 years. The projected 140,000 MT compare to a production potential of up to 500,000 MT. Adverse weather has been the main reason for the sharp decline. Spring frosts caused losses of at least 60% of the potential crop, while summer heat and drought further worsened production prospects and fruit quality. As dry conditions persisted, pre-harvest fruit drop accelerated, while apples remained small and, in part, poorly colored. The poor harvest could also leave Hungary's processing industry operating well below capacity. Apple processing plants have a capacity of around 350,000 MT per year. Some apples originally intended for the fresh market could also be diverted to processing due to quality issues. Based on the expected harvest, feedstock will cover only 20–25% of domestic processing capacity.
- In terms of percentage, the decline in production is most pronounced in Austria and Czechia. Both countries were hit hard by drought and heat with new temperature records. In Czechia, spring frosts were the main cause of the crop decline, while subsequent drought and localized hail further reduced fruit size and marketable quality. Undersized apples may be diverted to processing, while damage to the skin and flesh can impair storage quality. Consequently, supplies meeting fresh-market specifications could decline more sharply than overall production.

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.[5] 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*.

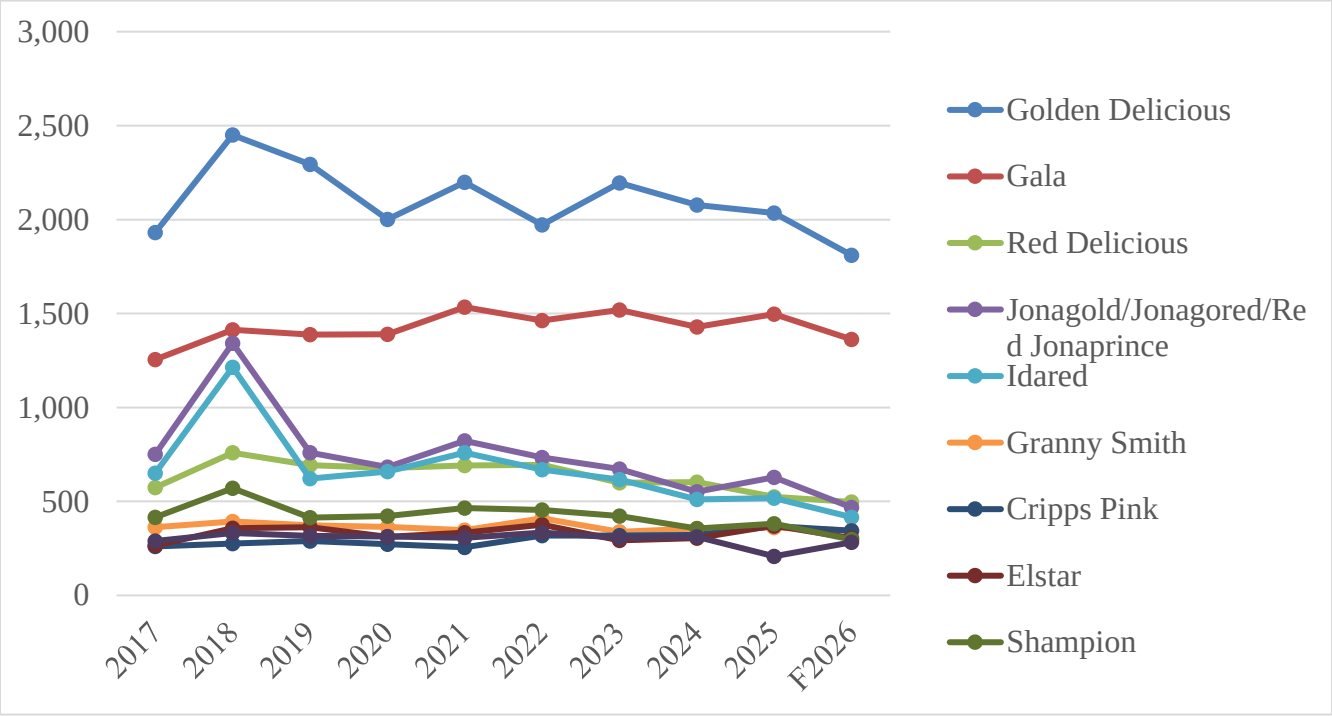
Varieties that are resistant to or tolerant against fungus diseases such as mildew (caused by *podosphaera leucotricha*) and scab (caused by *venturia inaequalis*) are increasing as these are better suited for the organic production sector and reduce disease management costs. Examples of such varieties include

[5] See policy section.

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"[6] varieties are gaining traction. Denmark, the Netherlands, and France have the highest share of "new" varieties in their production portfolio with 33 percent, 14 percent, and 14 percent of these varieties making up their respective total production. Club varieties are targeting the premium market. However, the proliferation of club varieties may face headwinds due to an expanding number of varieties competing for limited shelf space and consumer attention. A special form of the club concept are supermarket/grower cooperations that grant a retail chain exclusive marketing rights to a certain variety.

Chart 1: 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

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

Apples - Non-commercial Production

Non-commercial production in MY 2026/27 is estimated to have dropped 5 percent compared to the MY 2025/26 harvest. This is mostly due to reductions in Czechia and to a lower extent in Austria, Ireland, Belgium, and the Netherlands despite higher production in Romania, Bulgaria, and Slovakia. Non-commercial production tends to alternate between good and poor crop years. In MY 2026/27, non-commercial production represents about 7.1 percent of total apple production, compared to 6.5 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 1,022,444 MT on June 1, 2026, compared to 677,363 MT at the same time in 2025.

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

Domestic consumption, comprising of roughly two-thirds fresh consumption and one-third for processing, is expected to decline by 12 percent compared to the previous MY as a result of lower domestic production. The decline is expected to be more pronounced in consumption for processing (minus 19 percent) than for fresh consumption (minus 12 percent). This is largely due to the lower harvest in Poland, a major player in the EU processing industry.

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 2026/27, overall EU apple processing is expected to decrease 19 percent compared to MY 2025/26, amounting to roughly 3.8 MMT. While a 30 percent reduction in Poland is the driving factor for this drop, 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 Lithuania, Bulgaria, and Latvia based on higher production, and in the Netherlands based on a higher share of apples damaged by hail and drought. Processing is expected to remain flat in Ireland.

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

EU – UK trade

EU apple exports to the UK fluctuated between 150,000 to 190,000 MT over the past five years. The main EU apple exporters to the UK included France, Italy, Spain, Poland, Belgium, the Netherlands, Portugal, and Germany. 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 7,900 and 17,500 MT, in recent years, with the vast majority going to Ireland.

Apples - Imports

For MY 2026/27, EU imports are expected to increase by about 15 percent to compensate for lower domestic production. The most notable import increases are forecast for the Netherlands, France, Bulgaria, Germany, Spain, and Sweden. In contrast, Greece expects lower imports as its domestic production rebounded. In Ireland culinary apples from Northern Ireland for cider making account for a large part of imports. These imports are forecast to rebound after a ten-year low the previous marketing year.

In MY 2025/26, EU apple imports were lower than previously expected in line with better-than-expected domestic production. Sixty-two percent of EU apple imports originated from the southern hemisphere (Chile, South Africa, New Zealand, Brazil, and Argentina) 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. 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 2023/24	MY 2024/25	MY 2025/26	Change MY 2024/25 To MY 2025/26	Share of Total Imports in MY 2025/26
Chile	57,165	74,213	**65,983**	-11%	28%
South Africa	52,837	47,318	**45,031**	-5%	19%
North Macedonia	38,993	43,318	**34,294**	-21%	15%
Moldova	21,160	31,239	**33,312**	7%	14%
New Zealand	28,330	21,894	**21,258**	-3%	9%
United Kingdom	10,957	12,048	**8,762**	-27%	4%
Serbia	24,518	17,673	**6,810**	-61%	3%
Brazil	3,592	3,878	**6,711**	73%	3%
Argentina	4,495	7,415	**4,682**	-37%	2.0%
Switzerland	230	1,715	**1,570**	-8%	0.7%
Albania	981	2,698	**1,500**	-44%	0.6%
Ukraine	9,821	3,002	**900**	-70%	0.4%
Other	2,568	3,840	**1,098**	-71%	0.5%
World total	**255,647**	**270,251**	**231,911**	**-14%**	

Note: The table is grouped by ranking in MY 2025/26. Due to rounding percentages may add up to marginally less or more than 100%. Source: TDM, LLC accessed on September 28, 2026

Apples - Exports

In MY 2026/27, EU apple exports are forecast to decrease compared to the previous MY. This is due to a combination of lower EU production, especially in major exporting countries such as Poland and France, and expected increased competition from Türkiye, where production and exports are forecast to rebound from the low level in the previous MY.

In MY 2025/26, Italy, Poland, France, Spain, and Portugal were the top five apple exporters by volume amongst EU member states for destinations outside of the EU. They accounted for 40, 31, 15, 5, and 3 percent of total EU apples exports, respectively. Egypt surpassed the UK as the most important buyer of EU apples. Exports to Egypt increased along with its improving economy. Exports to Saudi Arabia and India benefited from lower exportable supplies from Türkiye.

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 2023/24	MY 2024/25	MY 2025/26	Change MY 2024/25 To MY 2025/26	Share of Total Exports in MY 2025/26
Egypt	87,644	144,038	**190,472**	32%	16 %
United Kingdom	189,992	169,986	**154,369**	-9%	13 %
Saudi Arabia	74,719	72,684	**97,702**	34%	8 %
India	64,210	51,818	**95,784**	85%	8 %
Brazil	86,422	81,548	**79,221**	-3%	7 %
Israel	37,531	49,170	**58,978**	20%	5 %
Kazakhstan	61,859	35,649	**54,659**	53%	5 %
Belarus	29,558	29,325	**49,707**	70%	4 %
United Arab Emirates	28,894	29,498	**35,797**	21%	3 %
Norway	33,214	32,131	**32,045**	0%	3 %
Jordan	21,740	25,422	**30,417**	20%	3 %
Colombia	25,445	22,381	**26,506**	18%	2 %
Libya	12,838	16,189	**21,310**	32%	1.8 %
Bosnia and Herzegovina	13,231	13,584	**17,984**	32%	1.5 %
Mongolia	18,324	17,830	**15,674**	-12%	1.3 %
Serbia	1,419	8,086	**13,648**	69%	1.2 %
Uzbekistan	6,497	8,049	**13,607**	69%	1.2 %
Switzerland	18,517	14,992	**12,512**	-17%	1.1 %
Albania	9,275	10,854	**11,329**	4%	0.97 %
Ecuador	12,896	8,092	**10,117**	25%	0.86 %
Morocco	7,785	10,466	**9,882**	-6%	0.84 %
Kyrgyzstan	4,504	4,452	**9,581**	115%	0.82 %
Mauritania	7,566	8,287	**8,598**	4%	0.73 %
Vietnam	9,019	11,009	**8,594**	-22%	0.73 %
Ukraine	2,426	12,017	**8,268**	-31%	0.71 %
United States	21	0	**48**	n/a	0.004 %
Other	82,679	85,056	**105,305**	24%	9 %
World total	**948,225**	**972,613**	**1,172,114**	**20%**	

Note: The table is grouped by ranking in MY 2025/26. Due to rounding percentages may add up to marginally less or more than 100 percent. Source: TDM, LLC accessed on September 28, 2026

The five largest EU exporters, together account for 93 percent of EU apple exports in MY 2025/26. These were Italy (to Egypt, Saudi Arabia, Israel, Brazil, India, UK, Norway, the UAE, Libya, Switzerland, Jordan, Albania), Poland (mostly to Egypt, Kazakhstan, Belarus, India, Jordan, Uzbekistan, UK, Mongolia, and Serbia), France (mainly to the UK, the UAE, India, Saudi Arabia, Vietnam, Israel, and Thailand), Spain (mostly to the UK, Morocco, Mauritania, Colombia, Brazil, and the UAE), and Portugal (predominantly to Brazil).

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

Apples – Prices

Producer prices for apples are not yet reflecting lower production but are expected to increase once the smaller and/or damaged fruit has been sold or diverted to processing. According to local sources, 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

Table 5: Production, Supply, and Distribution Pears

Pears, Fresh	2024/2025		2025/2026		2026/2027	
Market Year Begins	July 2024		July 2025		July 2026	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	104,002	98,625	100,536	96,341		96,448
Area Harvested (HA)	99,814	94,965	98,016	92,361		93,120
Commercial Production (MT)	1,752,575	1,769,503	1,781,930	1,845,756		1,880,640
Non-Comm. Production (MT)	89,618	86,932	79,400	70,978		74,520
Production (MT)	1,842,193	1,856,435	1,861,330	1,916,734		1,955,160
Imports (MT)	171,200	171,922	165,000	152,706		142,500
Total Supply (MT)	2,013,393	2,028,357	2,026,330	2,069,440		2,097,660
Fresh Dom. Consumption (MT)	1,733,393	1,745,318	1,726,330	1,738,639		1,763,660
Exports (MT)	280,000	283,039	300,000	330,801		334,000
Total Distribution (MT)	2,013,393	2,028,357	2,026,330	2,069,440		2,097,660
(HA), (MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Not official USDA data. Sources: Trade for MY 2024/25 and 2025/26: Trade Data Monitoring, LLC (TDM) accessed in September 2026; All other: FAS EU posts

Pears – Production

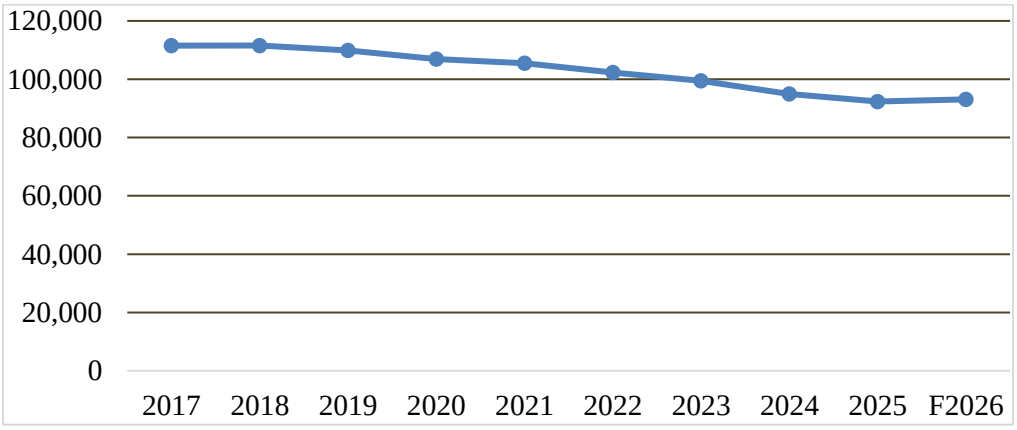
Pears – Commercial Production

EU commercial pear production is forecast at 1.88 MMT, an increase of almost 2 percent (or 34,888 MT) compared to MY 2025/26. Although the total harvest volume is comparable to last year's, changes in production vary across Member States. Fruit size is expected to be smaller and the overall quality is expected to be excellent. The Netherlands, Belgium, Italy, and Spain continue to lead production and together represent over 70 percent of total EU commercial production.

Post revises MY 2025/26 EU commercial pear production up by 4 percent (or 63,826 MT). Despite lower production in Italy, Spain, and Greece, higher crops were recorded in Belgium (+45,000 MT), France (+20,000 MT), and the Netherlands (+11,000 MT). Fruit sizes were larger than initially expected as sufficient water availability supported better fruit development and sizing.

After a decline over many years, harvested area seems to be stabilizing around just below 95,000 hectares. Italy, the country in the EU with the largest acreage of pears, saw its area harvested cut in half to 19,548 ha in past 15 years, driven by diseases, pests, rising production costs, extreme weather events, and aging orchards. This trend can also be seen in Spain and to a lesser extent Portugal. Factors such as generational interest in managing family orchards, overall profitability, challenges with pesticide use and water management, and overall pear consumption, will continue to determine the area of pear orchards throughout the EU in the coming years.

Chart 2: EU Harvested Pear Area 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 2024/25	MY 2025/26	MY 2026/27e	Change 2026:2025	Share of Total EU Production in 2026
The Netherlands	322,000	359,000	383,000	7%	20%
Belgium	269,000	393,000	364,000	-7%	19%
Italy	400,000	296,000	347,000	17%	18%
Spain	222,023	242,757	243,000	0%	13%
France	151,870	158,210	141,600	-10%	8%
Portugal	125,223	124,867	138,000	11%	7%
Poland	92,000	96,000	80,000	-17%	4%
Greece	76,921	70,000	80,000	14%	4%
Germany	38,964	42,290	40,900	-3%	2%
Romania	18,882	18,500	19,000	3%	1%
Other	52,620	45,132	44,140	-2%	2%
Total Production	1,769,503	1,845,756	1,880,640	2%	

e = estimated; Source: FAS EU posts

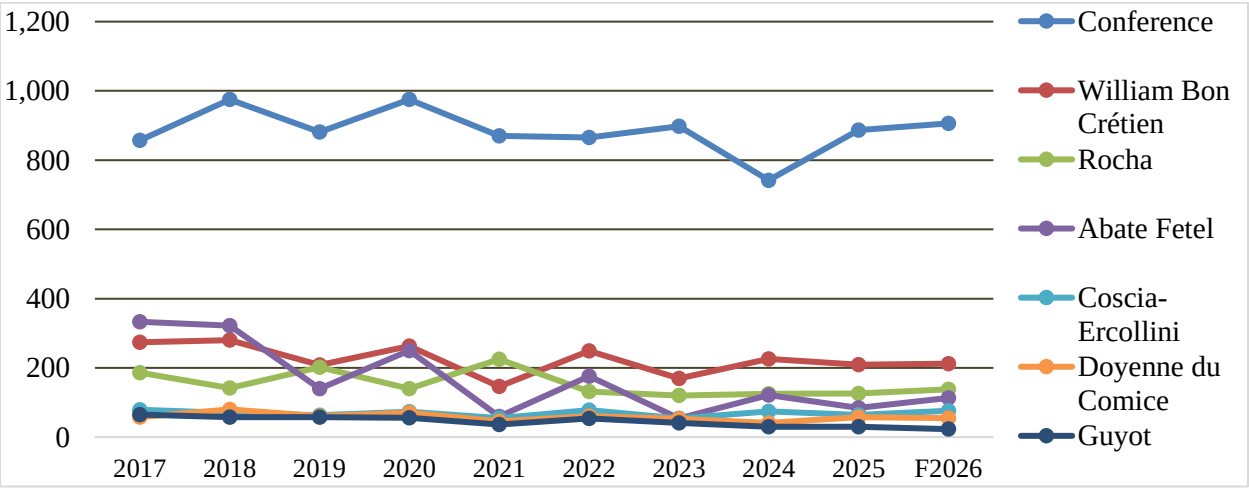
Member State Specific Production Information:

- Post forecasts higher pear production for the Netherlands. Abundant blossoming and fruit set, favorable early-season growing conditions, and a normal physiological fruit drop resulted in a high fruit count, although pears are expected to be slightly smaller. Having access to sprinkler irrigation and fertigation helped many Dutch growers mitigate water shortages. Cooler temperatures and sufficient rainfall from mid-August supported further fruit development. In the Netherlands, as well as neighboring Belgium, abundant sunshine contributed to high sugar levels and excellent flavor. In both countries Conference remains the dominant variety, although grower interest in club varieties continues to increase.
- In Belgium, the prolonged drought had a greater impact on its orchards, as a larger share of growers lack access to irrigation, partly reflecting the sector's fragmented structure and the prevalence of small orchards. Water shortages and a relatively high physiological fruit drop resulted in smaller pears and fewer fruits per tree. Cooler temperatures and rainfall since late August have accelerated fruit growth, helping fruit sizes catch up..
- The leading cultivars in Italy are *Abate Fetel* and *William Bon Crétien* and while pear production is forecast to be up, it is still well below Italy's estimated production potential of approximately 420,000 MT. The growing season began favorably, but high temperatures from late June onward hindered fruit development, while hail and strong winds caused localized damage, further reducing production potential. Persistent phytosanitary problems, and increasingly variable weather conditions continue to constrain yields and prevent the sector from reaching its full production potential.
- In Spain, output is expected to remain somewhat below the country's full production potential due to an abundant physiological drop and high temperatures throughout the growing season,

which affected fruit development and size. Spanish growers are testing and adopting more climate-resilient pear varieties to safeguard future harvests. Spain has one of the EU's most diverse pear varietal structures, including *Conference*, *Williams*, *Ercolini*, *Guyot-Limonera*, *Blanquilla*, and several other varieties.

- The pear harvest in France was affected by a wet spring during flowering, followed by five consecutive heatwaves and a severe drought that blocked fruit growth, resulting in smaller fruit. The area harvested is slightly growing especially in the Pays de la Loire region as some local fruit growers benefit from strong local demand.
- The production of the *Rocha* variety in Portugal, benefited from favorable late-spring conditions and sufficient summer heat, which improved fruit sizing. Fruit size further increased in the weeks leading up to harvest, with quite high sugar levels. Pear *stenphylliosis* and *fire blight* continue to 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.
- Despite a slight increase in planted area, Poland's pear production is forecast to decline due to spring frosts, limited rainfall, and intense summer heatwaves, which reduced both fruit size and yields. Recent years saw more young orchards often replacing apple trees, with new plantings focused on *Conference* 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.
- Post forecasts higher pear production for Greece due to good weather conditions throughout the growing season. *Krystalli*, a synonym to Spanish *Blanquilla*, is the leading pear variety and the fruit quality is expected to be very good.

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 2026/27 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 108,000 MT in MY 2026/27, and is expected to further increase in the coming years.

According to WAPA data, the production of organically produced pears is estimated at 72,130 MT this year. It represents 4 percent of total production and almost a quarter 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. MY2026/27's EU non-commercial volume (74,520 MT) is higher compared to the previous MY, which is mostly due to higher production in Austria, and, to a lesser extent, Belgium and Slovenia, despite lower non-commercial production in Czechia. Austria, Romania, and Czechia alone account for almost 83 percent of non-commercial production.

Pears – Consumption

EU consumption of pears is expected to remain weak in MY 2026/27 and consumption is anticipated to total 1.76 MMT. 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 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 still 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 the strongest among households with children and older consumers. Pear consumption is under pressure among younger consumers who are developing an appetite for other fruit (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. Club varieties seem to better match with consumer trends (crunchier pears and those with a longer shelf life) compared to more traditional varieties.

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.

For MY 2026/27, processing volumes are estimated at 277,665 MT since there will be more small pears. Italy will account for more than one-third (or 104,200 MT) of the total and the majority are purchased by the domestic juice industry. Combined processing volumes in Belgium, Austria, the Netherlands, France, and Spain are estimated at approximately 140,000 MT, with most used for juice, compote, and canned products. In Austria, a significant share of these pears is expected to be further processed into perry (or pear cider), an alcoholic beverage made from fermented pears.

Pear – Imports

In MY 2024/25, imported pears represented almost 7 percent of total EU pear supply with most of them ending up in the EU fresh market. Pears from southern hemisphere countries are responsible for 85 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 2025/26 followed this pattern and popular imported varieties include *Packham*, *Abate Fetel*, *Forelle*, and *Williams Bon Crétien (Bartlett)*.

China has now become the EU's fourth largest supplier of pears, and ships Asian pears, including the popular Ya variety, which is predominantly consumed by the Asian population in the EU. Türkiye is the EU's fifth largest supplier of pears with most shipments arriving in Romania and Germany. Other pear suppliers include Bosnia and Herzegovina, which benefits from its proximity to the EU and competitive prices, and Serbia, which is a stable supplier to the Croatian market and helps meet local demand. 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 2025/26, the Netherlands and Italy together accounted for three quarters 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.

EU imports were down by 11 percent in MY 2025/26 compared to MY 2024/25 due to higher EU commercial pear production that year. In MY 2026/27, EU pear imports are forecast to decline slightly further due to a somewhat higher domestic commercial production.

Table 7: EU Import of Pears in MT

Country of Origin	MY 2023/24	MY 2024/25	MY 2025/26	MY 2025/26 to MY 2024/25	Share of Total Imports in MY 2025/26
South Africa	82,856	70,446	66,760	-5%	44%
Chile	38,006	36,743	37,153	1%	24%
Argentina	32,312	30,017	26,168	-13%	17%
China	10,996	11,330	14,256	26%	9%
Türkiye	13,932	14,899	4,877	-67%	3%
Bosnia and Herzegovina	776	2,586	1,403	-46%	1%
Serbia	2,978	4,410	1,059	-76%	1%
Other	1,562	1,491	1,030	-31%	1%
Total	**183,418**	**171,922**	**152,706**	**-11%**	

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

Pear – Exports

In MY 2026/27, EU pear exports are forecast to be comparable to MY 2025/26 levels while fewer pears from Belgium and Poland are available for export markets, more will be available from the Netherlands and Portugal.

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 283,039 MT in MY2024/25. Pear exports are largely comprised of pears produced in the EU, as opposed to transshipments. For MY 2025/26, exports were up by 17 percent compared to the year before, due to a higher availability of Conference pears for export.

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 81,000 MT for the past three marketing years. EU pear exports to the UK are expected to remain stable in MY 2026/27 as well as exports to other mature consumer markets in Europe, such as Norway and Switzerland, as a direct result of a good pear harvest.

Belarus, Kazakhstan, and other countries that have proximity to Russia, including Moldova, Azerbaijan, Georgia and Tajikistan, are also important markets for Belgian and Dutch Conference pears. EU exports of these pears 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 increase by an estimated 13,000 MT compared to last year, shipments to Brazil are also expected to go up. Portugal continues to be a net exporter of pears, with production volumes exceeding domestic consumption.

Table 8: EU Pear Exports in MT

Country of Destination	MY 2023/24	MY 2024/25	MY 2025/26	MY 2025/26 to MY 2024/25	Share of Total Exports in MY 2025/26
Belarus	75,992	52,320	111,653	113%	34%
United Kingdom	82,153	81,648	80,383	-2%	24%
Morocco	26,288	29,111	42,140	45%	13%
Brazil	22,486	19,318	18,227	-6%	6%
Norway	13,060	11,115	12,646	14%	4%
Switzerland	9,689	5,537	8,299	50%	3%
Ukraine	2,874	5,681	6,219	9%	2%
Bosnia and Herzegovina	3,487	1,926	4,684	143%	1%
Serbia	3,112	1,708	4,604	170%	1%
Kazakhstan	29,636	37,441	3,887	-90%	1%
China	4,917	3,251	3,734	15%	1%
Russia	1,479	1,801	3,260	81%	1%
Libya	3,175	3,404	3,222	-5%	1%
Albania	2,756	3,044	3,155	4%	1%
Israel	1,825	6,223	3,101	-50%	1%
Other	21,288	19,511	21,587	11%	7%
Total	**304,217**	**283,039**	**330,801**	**17%**	

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

Pear – Prices

MY 2026/27 is expected to have the fifth-smallest pear harvest of the past decade. Fruit quality is expected to be good, which could create upward development in prices. In Belgium and to a somewhat lesser extent the Netherlands, a larger volume of pears below 55 mm could put pressure on the market, resulting in lower prices for these smaller sized pears. Producer prices for early varieties started at a similar price than last year. Solid higher prices for pear growers are needed to compensate for increased costs of water, labor, energy, packaging, and plant protection according to local sources.

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	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jun 2024		Jun 2025		Jun 2026	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	96,367	95,542	96,180	95,389		94,425
Area Harvested (HA)	92,236	90,192	92,720	92,837		91,822
Commercial Production (MT)	1,409,657	1,408,731	1,519,600	1,524,210		1,585,800
Non-Comm. Production (MT)	3,188	3,188	3,000	3,072		3,250
Production (MT)	1,412,845	1,411,919	1,522,600	1,527,282		1,589,050
Imports (MT)	656,900	656,986	665,000	694,142		670,000
Total Supply (MT)	2,069,745	2,068,905	2,187,600	2,221,424		2,259,050
Fresh Dom. Consumption (MT)	1,940,045	1,908,330	2,057,600	2,056,285		2,093,050
Exports (MT)	129,700	160,575	130,000	165,139		166,000
Total Distribution (MT)	2,069,745	2,068,905	2,187,600	2,221,424		2,259,050
(HA), (MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Not official USDA data. Sources: Trade for MY 2024/25 and 2025/26: Trade Data Monitoring, LLC (TDM) accessed in September 2026; 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 most commercial output. In MY 2026/27 (June/May), commercial EU table grape production is forecast higher than in the previous season, mainly due to a larger Italian crop, supported by higher yields and new, productive seedless vineyards entering production. Output is also expected to increase in Spain, Greece, Romania, Portugal, and Bulgaria, while France is forecast to record lower volumes because of prolonged drought and heat stress.

Overall fruit quality is reported as good to very good. Favorable weather conditions supported fruit development in several producing regions, while high summer temperatures contributed to good sugar levels.

MY 2026/27 EU table grape harvested area is forecast to edge lower by one percent from the previous season, remaining broadly stable overall. New seedless vineyards are entering production, particularly in

Italy's Puglia region, Spain's Murcia region, and Portugal's Ribatejo and Alentejo regions, gradually replacing seeded varieties. High input, energy, labor, and logistics costs remain major challenges for EU table grape growers.

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

COUNTRY	MY 2024/25	MY 2025/26	MY 2026/27e	Change 2026:2025	Share of Total EU Production in 2026
Italy	730,000	850,000	**900,000**	6%	57%
Spain	363,989	341,400	**345,000**	1%	22%
Greece	210,094	230,000	**240,000**	4%	15%
France	47,180	41,360	**36,000**	-13%	2%
Romania	33,000	38,500	**39,000**	1%	2%
Portugal	14,380	12,950	**15,000**	16%	1%
Bulgaria	10,088	10,000	**10,800**	8%	1%
Total	**1,408,731**	**1,524,210**	**1,585,800**	**4%**	**100%**

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

Member State Specific Production Information

Compared with MY 2025/26, MY 2026/27 table grape commercial production developments by Member States are as follows:

- Italy is expected to strengthen its position as the EU's leading table grape producer with increased production supported by higher yields and new seedless vineyards. Early-season conditions were generally favorable, supporting good crop development and very good fruit quality. Later in the summer, intense heat increased irrigation requirements and caused some localized losses, without affecting the overall positive outlook. Puglia remains the country's main production hub. The varietal mix remains broad: well-established cultivars such as *Italia*, *Victoria*, *Red Globe*, *Michele Palieri*, and *Black Magic* remain important, while seedless varieties including *Crimson*, *Sugraone*, *Thompson*, and *Regal* are becoming increasingly prominent.
- Spain's table grape production is expected to edge higher by one percent from the previous season. Adequate winter chilling supported uniform bud break, while sufficient rainfall and favorable weather during flowering contributed to good fruit set. Murcia and Alicante are the main producing areas.
- Greece is expected to register a 5 percent larger table grape crop with good fruit quality due to favorable growing conditions. Wet spring weather increased downy mildew pressure in Northern areas, particularly around Kavala, limiting yields in some varieties. Production remains concentrated in Corinth, Kavala, Tyrnavos, and Heraklion. *Sultana* and *Victoria* remain important, with growers also showing increasing interest in seedless varieties such as *Crimson* and *Sugraone*, broadening the varietal offer across the season.

- France is the only producer expected to record a decline. Prolonged drought and excessive heat during the growing season reduced berry size in several producing areas, although sugar levels are reported as excellent. Production is strongly concentrated in the Southeast. Traditional varieties include *Muscat de Hambourg*, *Chasselas*, and *Alphonse Lavallée*.
- Romania's table grape crop is expected to recover modestly from the previous season, supported by favorable growing conditions in the main producing areas of the Southeast. However, output is expected to remain below recent average levels.
- Portugal is set for a marked increase in table grape output, with good yields and fruit quality reported across the main producing areas (Alentejo, Ribatejo, and Algarve). Nevertheless, extreme summer heat in the South required additional measures to protect both fruit and workers, including nighttime harvesting in some locations.
- Bulgaria is also expected to record an increase, supported by generally favorable growing conditions.

Table Grapes – Non-Commercial Production

Non-commercial EU table grape production includes table grapes grown in home gardens, meadows, or field edges. MY 2026/27 non-commercial production is forecast higher than in the previous season, mainly reflecting increased volumes in Romania (+6 percent) and Bulgaria (+4 percent) under generally favorable growing conditions.

Table Grapes – Consumption

EU fresh table grape consumption is forecast to edge slightly higher in MY 2026/27, while remaining broadly stable by historical standards, consistent with the characteristics of a mature European market. Demand continues to be supported by year-round availability, convenience as a fresh snack, and growing consumer preference for seedless varieties. However, competition from other summer fruits and continued pressure on household spending limit stronger growth. Domestic production supplies most consumption during the European season, while imports from Southern Hemisphere suppliers are particularly important during the first half of the calendar year, allowing retailers to offer table grapes throughout most of the year.

Third-country imports are equivalent to approximately 32 percent of total EU consumption. Italy, Germany, Spain, Greece, and France are expected to remain the largest EU consumers of table grapes, followed by Romania, Portugal, Czechia, Austria, Bulgaria, Slovakia, Slovenia, and Croatia. Consumer preferences continue to shift toward seedless varieties. Seedless grapes are preferred in most of Northern Europe, while traditional seeded and local varieties still retain a market in Southern and Eastern Europe, including Italy and Spain. Popular seedless varieties include *Sugraone*, *Crimson*, *Thompson*, *Regal*, *Summer Royal*, *Scarlet Royal*, *Autumn King*, and *Cotton Candy*.

Table Grapes – Trade

Table Grapes - Imports

Unlike apples and pears, the EU is a net importer of fresh table grapes. MY 2026/27 imports are forecast lower as stronger domestic production increases EU availability. Nevertheless, imports remain important outside the main European production season. In MY 2025/26, EU imports increased from the previous season. Strong increases in shipments from South Africa and Egypt, together with higher volumes from Moldova, Namibia, and Brazil, more than offset lower imports from India. The Netherlands and Germany remain the largest EU importers, followed by Poland, France, Spain, and Romania. The Netherlands also serves as the EU's main entry and re-export hub for imported table grapes. Imports from the United States remain rare.

Table 11: EU Imports of Table Grapes in MT

Country of Origin	MY 2023/24	MY 2024/25	MY 2025/26	Change MY2024/25 to MY2025/26	Share of Total Imports in MY 2025/26
South Africa	183,895	192,066	**219,132**	14%	32%
Peru	81,558	129,890	**128,917**	-1%	19%
Chile	46,083	74,401	**76,751**	3%	11%
Egypt	65,088	51,855	**73,682**	42%	11%
India	102,827	97,570	**68,702**	-30%	10%
Moldova	42,640	28,000	**38,225**	37%	6%
Brazil	26,555	26,670	**29,233**	10%	4%
Namibia	22,466	21,927	**28,786**	31%	4%
Turkey	24,650	21,011	**15,680**	-25%	2%
North Macedonia	2,862	4,552	**6,548**	44%	1%
United States	2	17	**0**	-97%	0%
Other	6,272	9,027	**8,486**	-6%	1%
Total	604,898	656,986	**694,142**	**6%**	**100%**

Source: Trade Data Monitor, LLC (TDM) accessed in September 2026. Due to rounding percentages add up to marginally more than 100 percent.

Table Grapes - Exports

MY 2026/27 EU table grape exports are forecast to edge higher, supported by increased domestic availability. However, export margins remain under pressure from elevated production, freight, and cold-chain costs. These challenges have been further aggravated by the ongoing war in Ukraine, which continues to contribute to higher input costs and supply chain uncertainty across the EU agricultural sector. In addition, tensions in the Middle East have disrupted table grape shipments to some Gulf markets, increasing freight and insurance costs and making transit times less predictable. For table

grapes, longer and more uncertain transit times can also increase the risk of quality deterioration during transport.

In MY 2025/26, EU table grape exports increased 3 percent from the previous season, reflecting ample domestic availability. The United Kingdom remained the largest destination, recording a small increase. Shipments to Switzerland, Ukraine, Serbia, and Bosnia and Herzegovina also grew. These gains more than offset lower shipments to Norway, Russia, and Albania. Exports to the United States remained marginal.

Table 12: EU Exports of Table Grapes in MT

Country of Origin	MY 2023/24	MY 2024/25	MY 2025/26	Change MY2024/25 to MY2025/26	Share of Total Exports in MY 2025/26
United Kingdom	85,323	82,816	**83,930**	1%	51%
Switzerland	25,971	26,074	**27,537**	6%	17%
Norway	14,113	16,391	**15,909**	-3%	10%
Russia	7,638	7,462	**4,841**	-35%	3%
Ukraine	2,149	3,405	**4,023**	18%	2%
South Africa	2,659	2,943	**3,165**	8%	2%
Serbia	1,197	2,491	**2,795**	12%	2%
Bosnia & Herzegovina	2,117	2,143	**2,671**	25%	2%
Saudi Arabia	1,596	1,214	**2,658**	119%	2%
Albania	2,931	2,320	**2,231**	-4%	1%
United States	591	373	**161**	-57%	0%
Other	18,452	12,943	**15,218**	18%	9%
Total	**164,737**	**160,575**	**165,139**	**3%**	**100%**

Data source: Trade Data Monitor, LLC (TDM) accessed in September 2026. Due to rounding percentages add up to marginally more than 100 percent.

Table Grapes – Additional Information

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

Section IV: Policy

Common Agricultural Policy

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 CAP crisis management tools. Notably, the proposal simplifies environmental requirements (GAECs for good agro-environmental conditions) linked to eco-payments for farmers which may reduce production costs. The proposal was adopted by the co-legislators in December 2025, published as Regulation (EU) 2025/2649, and entered into force on January 1, 2026.

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. The proposal is currently going through the EU legislative process: the European Parliament adopted its negotiating position on the EU budget in April 2026, and negotiations with the Council are ongoing, with a political agreement targeted by the end of 2026.

More information is available here: 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)

2026/873 allocates $152 million (€131.4 million) of EU funds for fruits and vegetables for the 2026/2027 school year for all the Member States. It applies from August 1, 2026.

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 2025, €15.6 million ($18 million) out of a total budget of €205 million ($236 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 2026 Promotion Programs for Agricultural Products.

Maximum Residue Levels (MRLs)

Maximum Residue Levels (MRLs) for pesticides, including import tolerances, have been harmonized throughout the EU and can be found in the EU MRL database. Active substances with MRLs that are being reviewed under Article 12 of Regulation (EC) No 396/2005 can be found here.

Captan is an active substance used as a fungicide on a variety of fruits. Captan has been renewed, under Regulation (EU) 2024/2186, since 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.

On December 16, 2025, the European Commission published its draft Food & Feed Omnibus proposal amending, amongst others, Regulation (EC) No 396/2005 on Maximum Residue Levels (MRLs). In the proposal, the Commission seeks to set residue levels for non-EU-approved pesticides at the "limit of quantification," effectively a zero-tolerance level, which could impact U.S. exports to the EU. The publication of this proposal initiated the beginning of the legislative process. The European Parliament and the Council of the European Union, as co-legislators, will now assess the Commission's legislative proposal. Amendments to the legislative proposal will be made separately by the Parliament and Council; however, negotiations will eventually occur to find institutional agreement before the proposals are adopted as official EU law.

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 2026 are published in Implementing regulation - EU - 2025/1926 - EN - EUR-Lex. They apply as of January 1, 2026. The tariffs for fresh deciduous fruits can be found:

Apples: see pages 107 and 766
Apple Juice: see pages 180
Pears: see pages 107 and 767
Grapes: see pages 107 and 765

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 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. On May 1, 2026, the interim Trade Agreement (iTA) entered into provisional application, while formal entry into force of the full trade agreement still requires European Parliament consent; the agreement is currently undergoing legal review by the European Court of Justice following a referral from the Parliament. Under the agreement, there is a gradual phase out 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.

Australia: On March 24, 2026, the EU and Australia concluded negotiations on a free trade agreement, with entry into force anticipated in late 2027. As part of the agreement, the ‘ad valorem’ component of tariffs in the EU’s Entry Price System on fruit will be eliminated once the agreement is fully implemented for Australian imports into the EU.

EU-Ukraine Trade Relationship

The European Union granted Ukraine a temporary liberalization of trade with its Autonomous Trade Measures (ATMs) Regulation, which was in effect from June 4, 2022, until June 5, 2025. This regulation suspended import duties, quotas, and trade defense measures on Ukrainian exports to the EU. Between June 6 and October 29, 2025, the EU-Ukraine trade relationship reverted to the 2014 Deep and Comprehensive Free Trade Area (DCFTA) via Regulation 1132/2025 reintroducing import quotas on Ukrainian agricultural goods.

On October 29, 2025, the revised EU-Ukraine Deep and Comprehensive Free Trade Agreement (DCFTA) entered into force (Regulation (EU) 2025/2199). The new DCFTA updates the original

agreement from 2014. The revised DCFTA increases market access in both directions compared to the 2014 agreement, but limits EU imports of sensitive agricultural products compared to the levels under the ATMs. It also enshrines a new safeguard clause and provides for the alignment of Ukrainian and EU production standards. Calendar year (CY) 2025 TRQs are applied proportionally from June 6 to December 31, 2025, to the amount of 7/12 of the annual TRQ volumes. For more information, please see GAIN Report European Union Revises Import Quotas for Agricultural Products from Ukraine.

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.

EU Tariff Reductions Under EU-US Trade Deal

On June 30, 2026, the EU published Regulation (EU) 2026/1455 on the adjustment of customs duties on the import of certain goods originating in the United States of America in the Official Journal. This Regulation entered into force on July 1, 2026. The Regulation will cease to apply on December 31, 2029, but the text foresees an extension of the period of application following a comprehensive assessment of the effects of this Regulation that the Commission shall publish by June 30, 2029.

Regulation 2026/1455 implements the U.S.-EU Framework Agreement of Reciprocal, Fair, and Balanced Trade by eliminating tariffs on most U.S. industrial goods and on a basket of agricultural goods.

Annex I of Regulation 2026/1455 lists goods for which the tariff for U.S. exports into the EU is zero percent. Annex I includes:

- Fresh cider apples, in bulk, from 16 September to 15 December – CN Code 0808 10 10
- Fresh perry pears, in bulk, from 1 August to 31 December – CN Code 0808 30 10

Annex II of Regulation 2026/1455 lists the goods for which the ad valorem component (variable duty rates depending on date) is now zero. However, please note that if the import price falls below the entry price, the specific duty on originating goods shall be maintained[7].

Annex II includes:

- Fresh table grapes – CN Code 0806 10 10
- Fresh apples (excluding cider apples, in bulk, from 16 September to 15 December) – CN Code 0808 10 80
- Fresh pears (excluding perry pears, in bulk, from 1 August to 31 December) – CN Code 0808 30 90

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.

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 3-5, 2027

[7] For more information, please see Annex II of Regulation 2658/87.

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 16-19, 2027
FRUIT ATTRACTION Madrid, Spain (Interval: yearly) https://www.ifema.es/en/fruit-attraction	Next Fair: October 5-7, 2027

Section VI: Related Reports

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

Prognosfruit 2026 - EU Production Forecast Down for Apples Up for Pears | E42026-0075| European Union | Published On: September 23, 2026 Prognosfruit 2026 - EU Production Forecast Down for Apples Up for Pears_Berlin_European Union_E42026-0075
Fresh Deciduous Fruit Annual | E42025-0022Berlin | European Union | Published On: December 2, 2025 https://www.fas.usda.gov/data/gain/2025/12/european-union-fresh-deciduous-fruit-annual
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
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