

Voluntary Report – Voluntary - Public Distribution

Date: September 23, 2026

Report Number: E42026-0075

Report Name: Prognosfruit 2026 - EU Production Forecast Down for Apples
Up for Pears

Country: European Union

Post: Berlin

Report Category: Fresh Deciduous Fruit

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Report Highlights:

On August 5-7, 2026, the World Apple and Pear Association (WAPA) presented the 2026 EU apple and pear crop forecast at the Prognosfruit convention. WAPA forecasts the 2026 EU fresh apple crop at 9.49 million metric tons (MT), 16 percent below the 2025 harvest. Production of fresh pears is forecast at 1.9 million MT and 5.5 percent higher compared to the production in 2025. This forecast reflects the situation as of mid-July. Additionally, the sector used the event to voice its concerns regarding the future EU common market policy in the 2028-2034 cycle.

General Information:

Prognosfruit is the annual European crop forecast colloquium for apples, pears, and concentrated apple juice (CAJ). Prognosfruit 2026 attracted 250 participants from 26 countries, of which nine countries were located outside of the EU, including representatives from the United States, Moldova, and China. It was organized by the World Apple and Pear Organization (WAPA) and the German Association of Producer Organizations for Apples and Pears ([Bundesvereinigung der Erzeugerorganisationen Obst und Gemüse e.V. |](#)) and held in Konstanz/Germany on August 5-7, 2026. **All forecasts are based on information available in mid-July.**



Philippe Binard and Gil Kaufmann from WAPA presented the apple and pear forecast, while Ursula Schockemöhle and Eva Würtenberger from *Agrarmarkt Informations-Gesellschaft mbH (AMI)*, Germany, reported on the market outlook for MY 2026/27. Gerhard Eberhöfer, board member of the *European Biofruit Forum (EBF)* reported on the situation for organic fruits.



Their presentations were followed by a roundtable discussion with representatives from WAPA, France, Poland, Germany, and Belgium.

Additional presentations not covered in this report focused on the market situation for apples and pears in neighboring European markets (Moldova, Ukraine) and in markets further afield (the United States,

Türkiye, the Caucasus, and China) as well as on the processing sector, consumption trends, and environmental sustainability.

Prognosfruit 2027 is planned for August 3-5, 2027, in Zagreb, Croatia.

Abbreviations:

EU	= European Union
MS	= EU member state(s)
MT	= metric ton(s) = 1000 kilograms
WAPA	= World Apple and Pear Association

Major Concerns of the Sector

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

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

Forecast for Apples Production in the EU

WAPA forecasts the apple crop of 20 reporting EU member states in 2026 at 9.49 million MT¹. This is a major decrease of 15.5 percent compared to the 2025 harvest and 14.2 percent below the average of the preceding ten years. If materialized, it would be the second-smallest crop of the last ten years. The forecast number includes 544,000 MT of organic apples.

Major Points on EU production:

- Over the past decade, EU apple acreage has declined, and 2026 data is not yet available.
- Yields are decreasing. Reasons for this include limited access to plant protection products; higher incidence of weather-related problems (droughts, late frosts, flooding), and a higher share of lower yielding organic production.
- The top five apple-producing member states in 2026 are Poland, Italy, France, Germany, and Spain with 28, 24, 12, 11, and 6 percent of EU production, respectively, together accounting for 81 percent of production.
- Participants noted climate change as a factor increasingly affecting EU production. Mild winters lead to earlier blossoming, which increases the threat of late frosts. Additionally, the frequency of droughts and floods increased.
- This year late frosts mainly affected Eastern Europe (Poland, Czechia, Slovakia, North-East Hungary) some parts of France, Spain, and Germany, the Baltics (Estonia, Latvia, Lithuania) and Scandinavia.
- Heat waves in late spring and summer especially affected Spain, France, Poland and Sweden.
- Poland remains the largest producer despite a projected 30 percent lower harvest.
- Organic production is forecast to decrease by 14 percent to 544,000 MT compared to 630,000 MT in 2025.

Major Points on Market Conditions:

- The general outlook for MY 2026/27 is challenging from a grower's perspective at least for the first half of the season due to large stocks. These are twice as high as in the previous season. Higher prices due to lower production are only foreseen for the second half of the marketing year.
- Non-commercial backyard production in Germany is expected to be at an average level (450,000 MT) and thus should not put pressure on the market.

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

- Weather-related effects could result in fewer early varieties, but quality concerns may require a larger share of fruit to be marketed shortly after harvest rather than being put into long-term storage.
- Consumption has declined, especially young people move from apples to “superfoods” such as berries, avocado, etc.
- Exports will face higher competition as production in Türkiye is forecast to rebound.
- High production costs, lack of availability of sufficient plant protection
- High costs for energy and logistics
- Export logistics are challenging due to the closure of the Strait of Hormuz and Houthi attacks on commercial ships in the Red Sea.

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

Country	2021	2022	2023	2024	2025	2026 f	% Δ 2026 versus 2025	% Δ 2026/ Average 23-25
Poland	4,300	4,495	3,970	3,190	3,800	2,665	-30%	-27%
Italy	2,053	2,113	2,175	2,329	2,319	2,269	-2%	0%
France	1,383	1,391	1,508	1,432	1,533	1,162	-24%	-22%
Germany	1,005	1,072	941	872	1,138	1,013	-11%	3%
Spain	563	412	518	546	488	525	8%	1%
Romania	594	543	534	491	442	430	-3%	-12%
Greece	246	321	183	245	190	291	53%	41%
Portugal	368	291	295	313	280	280	0%	-5%
Netherlands	243	235	199	194	236	195	-17%	-7%
Belgium	250	239	203	160	222	166	-25%	-15%
Hungary	520	280	550	330	170	135	-21%	-61%
Austria	120	151	116	75	138	90	-35%	-18%
Croatia	65	57	66	66	48	64	33%	7%
Other	279	337	257	226	250	211	-15.6%	-13.6%
Total	11,989	11,937	11,515	10,469	11,254	9,496	-15.6%	-14.3%

Source: WAPA, f = Forecast

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

Variety	2021	2022	2023	2024	2025	2026 f	% Δ 2026 versus 2025	% Δ 2026/ Average 23-25
Golden Delicious	2,199	1,972	2,196	2,078	2,035	1,810	-11%	-14%
Gala	1,534	1,463	1,519	1,428	1,496	1,363	-9%	-8%
Red Delicious	692	694	599	602	524	497	-5%	-14%
Idared	760	669	618	510	517	416	-20%	-24%
Granny Smith	347	410	338	356	360	345	-4%	-2%
Cripps Pink	256	319	318	321	369	343	-7%	2%
Elstar	333	376	293	305	371	304	-18%	-6%
Red Jonaprince	471	579	470	350	488	304	-38%	-30%
Shampion	465	454	422	355	381	297	7%	-7%
Fuji/Kiku	306	334	307	312	208	282	36%	2%
Jonagold	468	405	353	302	335	243	-27%	-26%
Pinova	195	207	207	192	222	185	-17%	-11%
Braeburn	205	202	189	166	182	153	-16%	-15%
Jonagored	251	208	186	134	194	130	-33%	-24%
Ligol	280	260	220	160	200	130	-35%	-33%
Reinette Grise du	141	151	157	154	136	125	-8%	-16%
Gloster	201	141	122	121	131	110	-16%	-12%
Jonathan	104	121	133	116	100	95	-5%	-18%
Morgenduft/Imperator e	32	32	28	60	56	64	14%	33%
Boskoop	61	84	50	45	62	43	-31%	-18%
Annurca	45	45	38	40	42	38	-10%	-5%
Cox Orange	16	14	9	10	15	12	-20%	6%
Other new varieties	340	497	658	594	634	694	9%	10%
Other	2,287	2,299	2,084	1,758	2,122	1,514	-29%	-24%
Total:	11,989	11,936	11,514	10,469	11,254	9,496	-16%	-14%

f= forecast, Source: WAPA

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

Table 3: Commercial Apple Stocks in Select MS, UK, and Switzerland on June 1 (1000 MT)

Country	2025	2026	Δ 2026:2025
Italy	250,404	316,651	26%
Poland	104,000	227,000	118%
France	139,125	148,115	6%
Germany	46,137	108,175	134%
Spain (Catalonia)	56,039	54,559	-3%
The Netherlands	25,293	50,375	99%
Austria (Steiermark)	9,832	38,099	287%
United Kingdom	17,468	28,841	65%
Belgium	8,774	24,083	174%
Switzerland	20,194	19,953	-1%
Czechia	97	6,592	6696%
Total	667,363	1,022,444	51%

Source: [WAPA](#)

Forecast for Pears

2026 production of fresh pears is forecast at 1.946 million MT,² versus 1.846 million MT in 2025. This is a recovery of 5.4 percent compared to 2025 but still 3.2 percent below the average of the preceding ten years. If materialized, it would be the fourth-smallest crop of the last ten years. The forecast number includes 72,000 MT of organic pears.

Major Points on EU Production:

- In the last decade EU pear area has declined by about 20 percent but was partially compensated for by higher yields. Data for 2025 is not yet available.
- The top five pear-producing member states in 2026 are the Netherlands, Belgium, Italy, Spain and Portugal with 20, 19, 18, 12, and 7 percent of EU production, respectively, together accounting for 75 percent of production.
- In the variety mix, *Conference* defended its position as the primary variety with 47 percent of total pear production. *Williams Christ/Bartlett* is number two (11 percent) followed by *Rocha* (7 percent) and *Abate Fetel* (6 percent). New and club varieties (e.g., *Xenia*®, *Qtee*®, *Migo*®, *Sweet Sensation*®, *Early Desire*®, *Fred*®) are gaining market share (6 percent).

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

- Heat, drought and water shortages remain a major uncertainty, especially regarding fruit size development

Major Points on Market Conditions:

- From a seller's point of view market conditions for pears are better than for apples.
- Except for the Netherlands, EU pear stocks are depleted.
- No pressure from the Southern Hemisphere
- EU pear production is expected to recover, with Italy returning as a stronger exporter and reshaping trade flows within Europe.
- Club varieties continue to grow and offer opportunities to stimulate demand in the premium segment.
- Pear consumption in the EU remains weak, although the decline is slowing. Exporters will need to focus more strongly on extra-EU markets.
- European pears have recently become more competitive in South America due to favorable exchange rates
- Competition within Europe is expected to increase.

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

Country	2021	2022	2023	2024	2025	2026 f	% Δ 2026 versus 2025	% Δ 2026/ Average 23-25
Netherlands	340	352	358	322	359	393	9%	13%
Belgium	356	346	381	269	393	364	-7%	5%
Italy	202	505	184	400	296	347	17%	18%
Spain	309	236	286	223	240	242	1%	-3%
Portugal	225	132	112	125	126	138	10%	14%
France	58	147	104	137	152	132	-13%	1%
Poland	70	95	100	100	110	130	18%	26%
Greece	67	99	61	71	62	93	50%	44%
Germany	37	36	38	39	42	43	2%	8%
Romania	50	42	42	39	35	34	-3%	-12%
Other	36	38	40	37	31	29	-6%	-19%
Total:	1,750	2,028	1,706	1,762	1,846	1,946	5.4%	9.9%

f = forecast, Source: WAPA

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

Variety	2021	2022	2023	2024	2025	2026 f	% Δ 2026 versus 2025	% Δ 2026/ Average 23-25
Conference	870	865	898	742	887	906	2%	8%
Williams BC/ Bartlett	146	249	169	226	209	212	1%	5%
Rocha	226	132	120	125	126	138	10%	12%
Abate Fetel	59	176	54	121	84	113	35%	31%
Coscia-Ercollini	55	78	54	74	64	76	19%	19%
Comice	46	60	53	41	58	55	-5%	9%
Guyot	36	54	41	30	30	23	-23%	-32%
Blanquilla	33	26	35	28	20	22	10%	-20%
Kaiser	17	31	12	23	19	20	5%	11%
Other new varieties	n/a	60	70	78	98	108	10%	32%
Other	258	296	200	273	251	273	9%	13%
Total:	1,750	2,028	1,706	1,761	1,846	1,946	5.4%	9.9%

f= forecast, Source: WAPA

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

Attachments:

No Attachments.