

**Voluntary Report** – Voluntary - Public Distribution

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**Report Name:** Prognosfruit 2024 - EU Production Down for Apples Up for Pears

**Country:** Germany

**Post:** Berlin

**Report Category:** Fresh Deciduous Fruit

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**Report Highlights:**

On August 7-9, 2024, the World Apple and Pear Association (WAPA) presented the 2024 EU apple and pear crop forecast at the 49th edition of the Prognosfruit convention. WAPA forecasts the 2024 EU fresh apple crop at 10.2 million metric tons (MT), 11.2 percent below the 2023 harvest. The reduction is a result of poor pollination and late frosts. Production of fresh pears is forecast at 1.79 million MT or a 4.9 percent increase compared to the record-low production in 2023. This forecast reflects the situation as of mid-July.

## General Information:

Prognosfruit is the annual European crop forecast colloquium for apples and pears. Since 2010, it also covers concentrated apple juice (CAJ). Prognosfruit 2024 attracted participants from 20 countries, including eight from outside the European Union (EU). It was held in Budapest/Hungary on August 7-9, 2024.



Philippe Binard and Gil Kaufmann from WAPA presented the apple and pear forecast, while Helwig Schwartz and Ursula Schockemoehle from *Agrarmarkt Informations-Gesellschaft mbH* (AMI), Germany, reported on the market outlook for MY 2024/25. Gerhard Eberhoefer, board member of the *European Biofruit Forum* (EBF) reported on the situation for organic fruits.



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

Additional presentations not covered in this report focused on the market situation for apples and pears in neighboring European markets (Turkey, Moldova, Ukraine) and in markets further afield (United States, India, Central Asia and Caucasus) as well as on consumption trends and marketing activities.

The second day focused on the fruit juice market with presentations from Klaus Heitlinger with the German Fruit Juice Industry Association (VdF), Audi Bezerra (Fruit and Tech – FTN), Piotr Podoba (Dohler), Franz Ennser (Austria Juice), and Peter Kelemen (FruitVeb).

All forecasts are based on information available in mid-July.

Prognosfruit 2025 is planned for August 2-4, 2023, in Anger, France.

## Abbreviations:

CAJ	= Concentrated Apple Juice
EU	= European Union
MS	= EU member state(s)
MT	= metric ton(s)
WAPA	= World Apple and Pear Association

## Forecast for Apples Production in the EU

WAPA forecasts the apple crop of 20 reporting EU member states in 2024 at 10.2 million MT<sup>1</sup>. This is a decrease of 11.3 percent compared to the 2023 harvest and 11.6 percent compared to 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 535,000 MT of organic apples.

### Major Points on EU production:

- Over the years, EU apple acreage has declined.
- Production capacity amounts to 13.5 to 14 MMT.
- The top five apple-producing member states in 2024 are Poland, Italy, France, Germany, and Spain with 31, 21, 14, 8, and 6 percent of EU production, respectively, together accounting for 80 percent of production.
- Climate change increasingly affects 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 Poland, Hungary, Czechia, Austria, Belgium, and Eastern Germany.
- Spanish and Greek production recovered from the drought in the previous year.
- Organic production is forecast to decrease to 535,000 MT compared to 606,000 MT in 2023, taking the share of organic at total EU apple production down to 5.24 percent (2023: 5.32 percent). This is well below the 25 percent goal that the EU has set itself for 2030, making it highly unlikely that this goal will be achieved.
- It is expected that the lower production in Poland and Hungary will lead to a 15-18 percent lower volume of apples going into processing.
- Harvest is expected to start one week to ten days earlier than in the previous year.
- Fruit size is expected to be mostly average, slightly larger than normal in Portugal and Belgium, and smaller in France and Poland.
- Year by year, climate change reduces pack-out share in Italy. Producers will need higher prices to compensate.
- In Germany, the replanting rate dropped to 1.8 percent of acreage in 2023 when it should be at least five percent.

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<sup>1</sup> This forecast only pertains to the 20 countries 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.

## Major Points on Market Conditions:

- The general outlook for MY 2024/25 is positive. However, there is a large variation of market conditions throughout the EU, depending on the apple variety and country.
- Positive factors:
  - Stocks of concentrated apple juice (CAJ) are extremely low and competition for processing apples is strong. As a result, the processing sector will likely absorb apples with a lower shelf-life, which will eliminate pressure from the table apple market.
  - End of the marketing year apple stocks are higher than in the previous season but still lower than in the years before.
  - Higher retail prices seem to have little impact on apple sale according to experience from the previous season.
  - Non-commercial backyard production in Germany is expected to be at an average level (500,000 MT), and thus should not put pressure on the market.
  - Brazil has developed into an attractive market especially for Italy, Portugal, France, and Spain
- Negative factors:
  - High competition from other fruits, e.g., berries
  - EU apple exports face strong competition from Iran, Afghanistan, and Türkiye in India.
  - Exports to Northern Africa are expected to further decline as consumers in those markets need their money for buying staples like bread/wheat.
  - High production costs
  - High costs for energy and logistics
  - Houthi attacks on commercial ships make exports to east Asia via the Red Sea more dangerous and costly.

FAS/Berlin analysis: U.S. apple exporters could see reduced competition from the EU in the world market, as production is forecast to be at the second-lowest level of the past ten years.

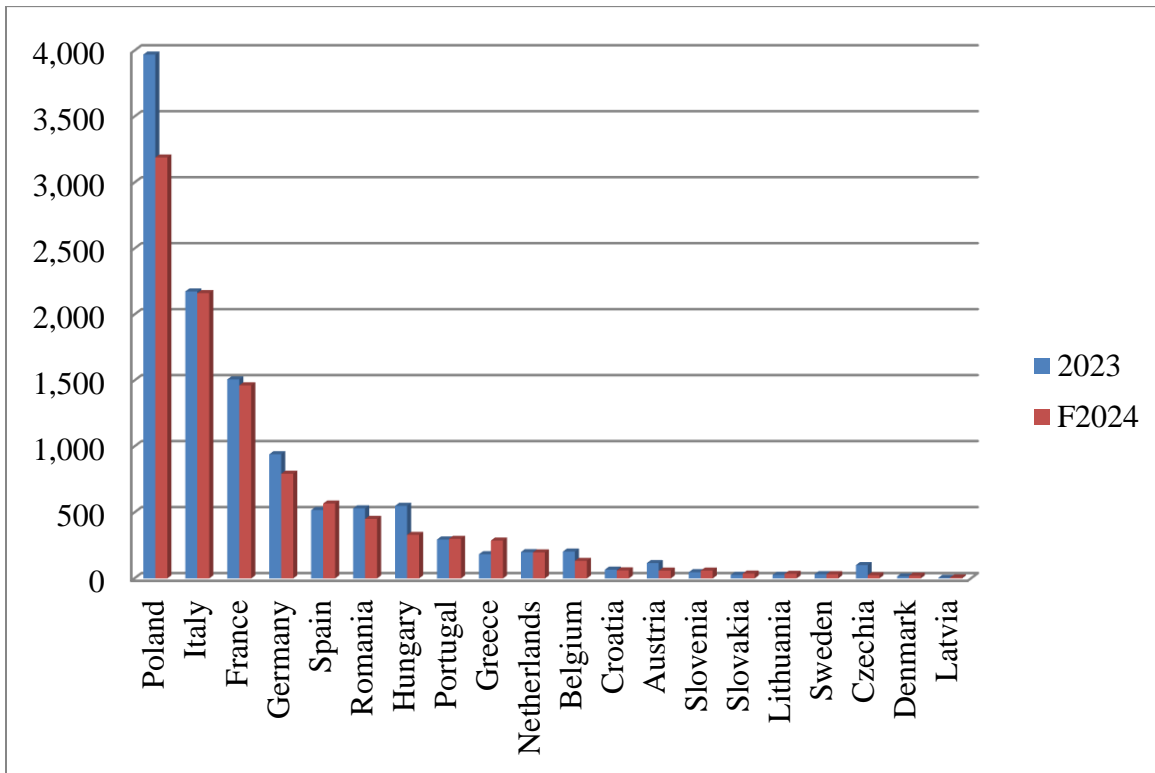
**Table 1: EU Apple Production by Country (1000 MT)**

Country	2019	2020	2021	2022	2023	2024 f	% 2024 versus 2023	% 2024/ Average 21-23
Poland	2,910	3,410	4,300	4,495	3,970	<b>3,190</b>	-20%	-25%
Italy	2,096	2,124	2,053	2,113	2,175	<b>2,162</b>	-1%	2%
France	1,651	1,337	1,383	1,391	1,508	<b>1,463</b>	-3%	2%
Germany	991	1,023	1,005	1,072	941	<b>793</b>	-16%	-21%
Spain	555	425	563	412	518	<b>567</b>	9%	14%
Romania	493	537	594	543	531	<b>451</b>	-15%	-19%
Hungary	452	350	520	280	550	<b>330</b>	-40%	-27%
Portugal	354	278	368	291	295	<b>300</b>	2%	-6%
Greece	276	208	246	321	183	<b>287</b>	57%	15%
Netherlands	272	220	243	235	199	<b>197</b>	-1%	-13%
Belgium	242	168	250	239	203	<b>133</b>	-34%	-42%
Croatia	60	55	65	57	66	<b>61</b>	-8%	-3%
Austria	146	126	120	151	116	<b>59</b>	-49%	-54%
Slovenia	36	46	44	50	47	<b>59</b>	26%	26%
Slovakia	35	30	31	32	27	<b>36</b>	33%	20%
Lithuania	26	52	36	51	27	<b>35</b>	30%	-8%
Sweden	22	29	32	32	32	<b>32</b>	0%	0%
Czech Republic	103	118	110	138	101	<b>24</b>	-76%	-79%
Denmark	15	24	18	24	15	<b>21</b>	40%	11%
Latvia	10	14	8	10	5	<b>7</b>	40%	-9%
<b>Total</b>	<b>10,745</b>	<b>10,574</b>	<b>11,989</b>	<b>11,937</b>	<b>11,509</b>	<b>10,207</b>	<b>-11.3%</b>	<b>-14%</b>

Source: WAPA

f = Forecast

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



Source: FAS/Berlin based on WAPA data

F= Forecast

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

Variety	2019	2020	2021	2022	2023	2024 f	% 2024 versus 2023	% 2024/Average 21-23
Golden Delicious	2,293	2,001	2,199	1,972	2,195	<b>1,972</b>	-10%	-7%
Gala	1,387	1,390	1,534	1,463	1,519	<b>1,351</b>	-11%	-10%
Red Delicious	693	677	692	694	599	<b>616</b>	3%	-7%
Idared	621	659	760	669	617	<b>503</b>	-18%	-26%
Shampion	414	423	465	454	422	<b>356</b>	-16%	-20%
Granny Smith	373	365	347	410	338	<b>341</b>	1%	-7%
Red Jonaprince	407	441	471	579	470	<b>328</b>	-30%	-35%
Cripps Pink	289	273	256	319	318	<b>309</b>	-3%	4%
Fuji/Kiku	316	313	306	334	307	<b>306</b>	0%	-3%
Elstar	363	312	333	376	293	<b>278</b>	-5%	-17%
Jonagold	395	315	468	405	353	<b>276</b>	-22%	-32%
Pinova	141	162	195	207	207	<b>183</b>	-12%	-10%
Reinette Grise du	134	136	141	151	157	<b>178</b>	13%	19%
Ligol	150	210	280	260	220	<b>160</b>	-27%	-37%
Braeburn	254	221	205	202	189	<b>160</b>	-15%	-19%
Gloster	145	154	201	141	122	<b>121</b>	-1%	-22%
Jonagored	246	250	251	208	186	<b>119</b>	-36%	-45%
Jonathan	118	118	104	121	132	<b>108</b>	-18%	-9%
Morgenduft/Imperatore	48	54	32	32	28	<b>56</b>	100%	83%
Annurca	45	45	45	45	38	<b>50</b>	32%	17%
Boskoop	55	46	61	84	50	<b>44</b>	-12%	-32%
Cox Orange	3	17	16	14	9	<b>9</b>	0%	-31%
Other new varieties	307	309	340	497	658	<b>639</b>	-3%	28%
Other	1,549	1,755	2,287	2,299	2,081	<b>1,744</b>	-16%	-22%
<b>Total:</b>	<b>10,746</b>	<b>10,646</b>	<b>11,989</b>	<b>11,936</b>	<b>11,508</b>	<b>10,207</b>	-11%	-14%

f= forecast

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

Source: WAPA

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

Country	2023	2024	2024:2023
Italy	97,499	<b>170,146</b>	75%
France	40,653	<b>73,347</b>	80%
Poland	70,000	<b>72,000</b>	3%
Spain (Catalonia)	26,036	<b>45,432</b>	74%
Germany	26,597	<b>24,403</b>	-8%
Austria (Steiermark)	22,702	<b>15,872</b>	-30%
Belgium	9,353	<b>11,993</b>	28%
United Kingdom	20,226	<b>10,869</b>	-46%
The Netherlands	20,622	<b>10,869</b>	-47%
Switzerland	4,734	<b>4,545</b>	-4%
<b>Total</b>	<b>338,422</b>	<b>439,476</b>	<b>30%</b>

Source: WAPA

## Forecast for Pears

Production of fresh pears is forecast at 1.79 million MT<sup>2</sup>, versus 1.70 million MT in 2023. This is a recovery of five percent compared to 2023 but still 16 percent below the average of the preceding ten years. If materialized, it would be the third smallest crop of the last ten years. The forecast number includes 69,830 MT of organic pears.

### Major Points on EU Production:

- The decline in EU pear area has stabilized. In 2024, for the first time in ten years, the area has slightly increased due to an expansion in Greece.
- In 2024, production is significantly rebounding in Italy (up 120 percent), Greece (up 38 percent) and France (up 15 percent) compared to the 2023 harvest, when they suffered from frosts, floods, and hail damage. The combined increase more than compensates for lower production in Belgium, the Netherlands, Spain, and Hungary.
- In the variety mix, Conference defended its position as the primary variety with 43 percent of total pear production. Williams Christ/Bartlett is number two followed by Rocha and Abate Fetel. New and club varieties (e.g., Xenia®, Qtee®, Migo®, Sweet Sensation®, Early Desire®, Fred®) are gaining market share.
- Due to climate change, pear production will move north.

<sup>2</sup> 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.



### Major Points on Market Conditions:

- Comparatively small EU harvests and depleted pear stocks should bode well for higher prices.
- The majority of pear trade, roughly 70 percent, occurs within the EU internal market.
- For exports outside the EU, the United Kingdom is the most important destination, especially for Belgium and the Netherlands (*Conference*), and to a lesser but increasing extent for Portugal (*Rocha*).
- Spain and Portugal are the largest actors for exports to Northern Africa and South America.
- Growing pear production in Poland may lead to higher Polish exports to Eastern Europe and reduce opportunities for Dutch and Belgian pears.
- If production in Italy continues to fall, this could open opportunities for other EU member states on the EU internal market.
- Pear consumption in the EU is declining, especially in Spain and Italy. Total EU pear consumption decreased by 20 percent from 2017 to 2023.

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

Country	2019	2020	2021	2022	2023	2024 f	% 2024 versus 2023	% 2024/Average 21-23
Italy	363	611	202	505	184	<b>405</b>	120%	36%
Netherlands	373	400	340	352	358	<b>327</b>	-9%	-7%
Belgium	332	393	356	346	381	<b>280</b>	-27%	-22%
Spain	313	307	309	236	286	<b>244</b>	-15%	-12%
Portugal	202	139	225	132	112	<b>124</b>	11%	-21%
France	121	133	58	147	104	<b>119</b>	14%	16%
Poland	70	65	70	95	100	<b>100</b>	0%	13%
Greece	58	80	67	99	61	<b>84</b>	38%	11%
Germany	42	39	37	36	38	<b>38</b>	0%	3%
Romania	48	47	50	42	42	<b>36</b>	-14%	-19%
Hungary	32	16	16	15	20	<b>15</b>	-25%	-12%
Denmark	4	6	6	7	7	<b>7</b>	0%	5%
Croatia	3	2	2	2	2	<b>3</b>	50%	50%
Slovenia	1	1	1	3	1	<b>3</b>	200%	80%
Czechia	6	6	7	7	7	<b>2</b>	-71%	-71%
Sweden	1	2	2	2	2	<b>2</b>	0%	0%
Slovakia	1	1	1	1	1	<b>1</b>	0%	0%
Latvia	1	1	1	1	0	<b>0</b>	n/a	-100%
<b>Total:</b>	<b>1,971</b>	<b>2,249</b>	<b>1,750</b>	<b>2,028</b>	<b>1,706</b>	<b>1,790</b>	<b>4.9%</b>	<b>-2.1%</b>

f = forecast,

Source: WAPA

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

Variety	2019	2020	2021	2022	2023	2024 f	% 2024 versus 2023	% 2024/ Average 21-23
Conference	881	975	871	865	898	776	-14%	-12%
Williams BC/ Bartlett	208	263	150	249	169	226	34%	19%
Rocha	202	140	226	132	120	129	8%	-19%
Abate Fetel	140	250	57	176	54	125	131%	31%
Coscia-Ercollini	63	73	55	78	54	75	39%	20%
Guyot	58	56	36	54	41	48	17%	10%
Comice	60	71	46	60	53	37	-30%	-30%
Blanquilla	37	38	33	26	35	31	-11%	-1%
Kaiser	21	43	17	31	13	24	85%	18%
Passacrassana	7	8	4	4	2	13	550%	290%
Durondeau	3	3	2	2	2	1	-50%	-50%
Other new varieties				60	70	67	-4%	55%
Other	290	326	252	290	196	240	22%	-2%
<b>Total:</b>	<b>1,971</b>	<b>2,246</b>	<b>1,740</b>	<b>2,028</b>	<b>1,707</b>	<b>1,792</b>	<b>5%</b>	<b>-2%</b>

f= forecast

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

Source: WAPA

**Attachments:**

No Attachments.