European and Polish Apples and Pears perspectives
Season 2025/2026

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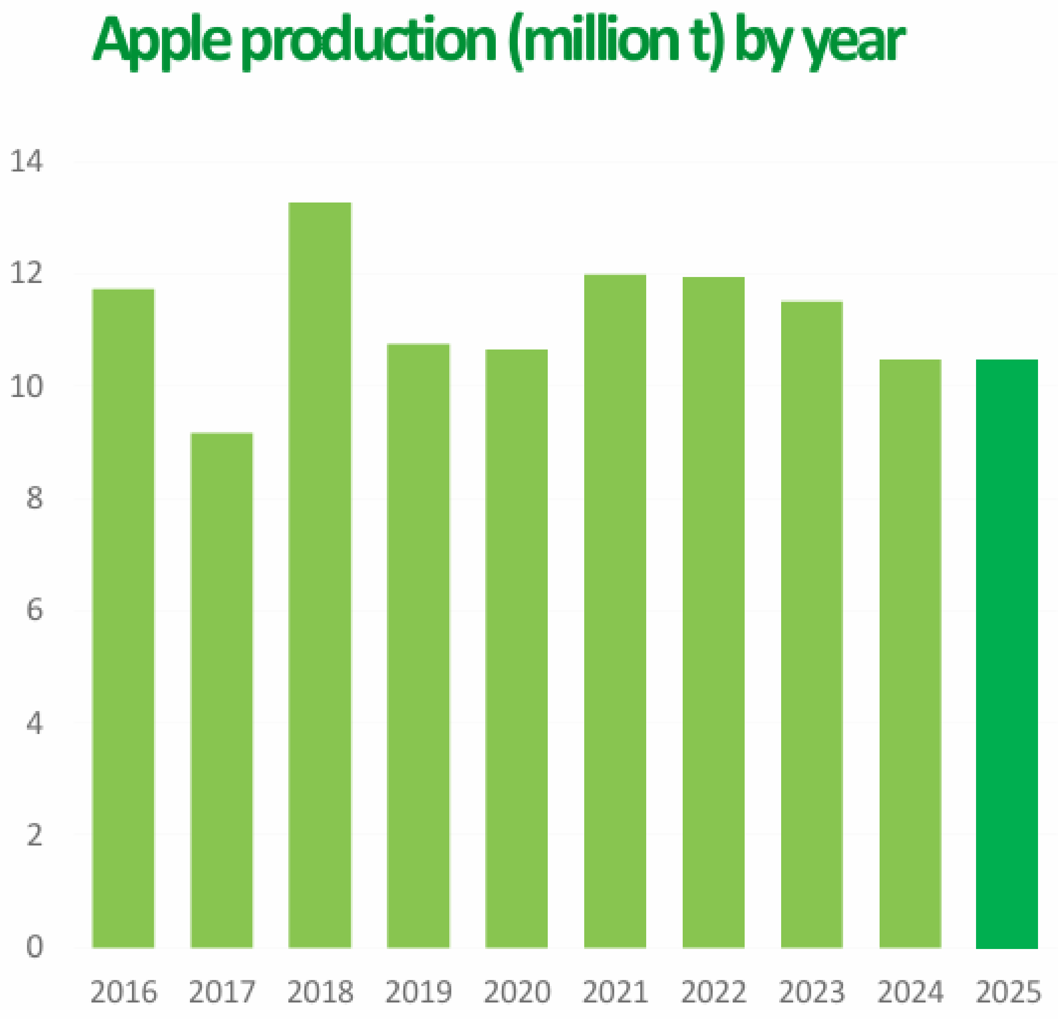
WAPA

Apples
Season 20225/2026

EU apple forecast : season 2025/2026

Year	Volume (million t)
2016	11,73
2017	9,16
2018	13,26
2019	10,75
2020	10,65
2021	11,99
2022	11,94
2023	11,51
2024	10,47
2025	**10,45**



Source: WAPA – Prognosfruit 2025

- Provisional apples data announced at Prognosfruit is 10,4 million T
- EU crop announced in August well below full potential of the orchards
- Crop rather on a medium to low level, with mix trends by production regions
- Impact of climatic conditions for setting forecast -evolving conditions post forecast
- Organic production 600,000 T (+2,3 %)
- Processing : 3,4 million T (-7,5%)

Year	Volume (million t)	VAR %
9Y AVG	11,27	-7,26%
5Y AVG	11,31	-7,57%
3Y AVG	11,31	-7,53%
2024	10,47	-0,13%
2025	**10,45**	

EU apple forecast : season 2025/2026

	2022	2023	2024	2025	YOY	3Y AVG
Austria	151	116	75	142	89,33%	24,74%
Belgium	239	203	160	183	14,02%	-8,87%
Croatia	57	66	66	48	-26,97%	-23,45%
Czechia	138	101	36	107	197,21%	16,94%
Denmark	24	15	21	24	14,29%	20,00%
France	1.391	1.508	1.432	1.484	3,63%	2,79%
Germany	1.072	941	872	1.000	14,68%	3,98%
Greece	321	183	245	178	-27,40%	-28,82%
Hungary	280	550	330	160	-51,52%	-58,62%
Italy	2.113	2.175	2.329	2.248	-3,46%	1,93%
Latvia	10	8	8	6	-25,00%	-30,19%
Lithuania	51	27	35	4	-90,00%	-90,71%
Netherlands	235	199	194	226	16,49%	8,05%
Poland	4.495	3.970	3.190	3.300	3,45%	-15,06%
Portugal	291	295	313	303	-3,26%	1,12%
Romania	543	534	491	442	-10,00%	-15,48%
Slovakia	32	27	36	32	-9,03%	2,60%
Slovenia	50	47	58	35	-39,53%	-32,09%
Spain	412	518	546	501	-8,26%	1,79%
Sweden	32	32	32	32	0,00%	0,66%
Total	11.936	11.514	10.468	10.455	-0,13%	-7,53%

Source: WAPA – Prognosfruit 2025

Crops under increasing climatic uncertainties

- Western Europe between recovery and stability :
  - Strong recovery in **DE, BE, NL, AT, CZ** , even if not a bumper crop
  - **FR** slightly up, **IT** stable but slightly down
- East & South-East Europe: mixed situation but overall down:
  - Complex crop assessment in **PL**
  - Low crops in East and South East **HU, EL, RO, LT, SK, HR, SLO**
  - Bad conditions leading to EU exceptional measures for **RO, PL, LT, BG**
- EU South-East neighbourhood heavily impacted in **TK, MD, RS**

EU apple forecast : season 2025/2026

WAPA

	2022	2023	2024	2025	YOY	3Y AVG
Annurca	45	38	40	42	5,00%	2,44%
Boskoop	84	50	45	54	20,65%	-9,64%
Braeburn	202	189	166	173	4,54%	-6,64%
Cortland	0	0	0	0		
Cox	14	9	10	10	0,00%	-9,09%
Cripps Pink	319	318	321	334	4,28%	4,72%
Elstar	376	293	305	330	8,12%	1,52%
Fuji	334	307	312	283	-9,42%	-11,01%
Gala	1.463	1.519	1.428	1.429	0,07%	-2,82%
Gloster	141	122	121	121	0,00%	-5,38%
Golden Delicious	1.972	2.196	2.078	2.059	-0,92%	-1,13%
Granny Smith	410	338	356	347	-2,50%	-5,71%
Idared	669	618	510	465	-8,79%	-22,34%
Jonagold	405	353	302	292	-3,47%	-17,45%
Jonagored	208	186	134	148	10,55%	-15,71%
Jonathan	121	133	116	100	-14,14%	-19,27%
Ligol	260	220	160	190	18,75%	-10,94%
Lobo	0	0	0	0		
Morgendurf/imperatore	32	28	60	54	-8,73%	35,97%
Pinova	207	207	192	211	9,92%	4,71%
Red Delicious	694	599	602	487	-19,17%	-22,99%
Red Jonaprince	579	470	350	390	11,46%	-16,36%
Reinette Grise du Canada	151	157	154	142	-7,59%	-7,83%
Shampion	454	422	355	379	6,90%	-7,59%
Spartan	0	0	0	0	1201,30%	128,15%
Stayman	0	0	0	0		
Other	2.297	2.082	1.759	1.734	-1,43%	-15,25%
Other new varieties	497	658	594	680	14,57%	16,69%
Total	**11.936**	**11.514**	**10.468**	**10.455**	**-0,13%**	**-7,53%**

Source: WAPA – Prognosfruit 2025

Growth YoY

- Elstar: some growth.
- Cripps Pink: positive performance.
- Pinova: strong upward trend.
- Annurca: small but steady growth.

Decline YoY

- Idared: sustained long-term decline.
- Red Delicious: consistent drop.
- Fuji: moderate but persistent decrease.
- Jonagored: declining trend.
- Jonathan: steady downward trend.
- Red Jonaprince: continued drop.

Stable or slight variation YoY

- Gala: essentially stable.
- Golden Delicious: minor decline but stable overall.
- Gloster: flat short-term trend.

EU apple forecast: season 2025/2026 –first update

	2022	2023	2024	2025
Austria	151	116	75	142
Belgium	239	203	160	183
Croatia	57	66	66	48
Czechia	138	101	36	107
Denmark	24	15	21	24
France	1.391	1.508	1.432	1.484
Germany	1.072	941	872	1.000
Greece	321	183	245	178
Hungary	280	550	330	160
Italy	2.113	2.175	2.329	2.248
Latvia	10	8	8	6
Lithuania	51	27	35	4
Netherlands	235	199	194	226
Poland	4.495	3.970	3.190	3.300
Portugal	291	295	313	303
Romania	543	534	491	442
Slovakia	32	27	36	32
Slovenia	50	47	58	35
Spain	412	518	546	501
Sweden	32	32	32	32
Total	**11.936**	**11.514**	**10.468**	**10.455**

- **Austria** :stability to be confirmed in December
- **Belgium**: probably up to > 200,000 T confirmation mid November
- **Croatia** : unchanged
- **France** : up by 20,000 T to 1.505.000 T
- **Germany:** Higher but data in 2/26– also strong garden production
- **Italy** : stable or minimal increase
- **Netherlands** : 236.000
- **Poland** : Moving up to > 3.700.000
- **Spain**: stable -may be slight decline
- **Total : new EU total to be reaching > 10,9 million T**

Source: WAPA – Prognosfruit 2025

Extra-EU apple forecast for the 2025/2026 season

EU Neighborhood

-38,7% at 2.710.000 t => impact on trade in Middle East, India , demand for fruit by Turkish operators in the EU (for international markets) and also supply directly/indirectly to Turkey despite duties

-26,7% at 238.000 t => EU export to Serbia up, tough still marginal, lower import into the EU, reflecting the low crop

-31,5% at 277.000 t => Crop level completely reviewed to 412.000 T . Reasons:

- impact frost too pessimistic
- sufficient rainfall

From crop 255.000 T will go to processing . So far till end October, more export to EU than last year (4.500 T till end October)

Apple market outlook overview

Supply

- Moderate harvest, but different starting position for EU regions
- More apples in PL but lower quality – pressure on price from last year peak
- Less table apples in the Baltic, East (except PL) and South-East
- End of last season high prices , no stocks , no overlap with SH
- Pressure on production prices and labour on-going

Market

- Local sales still dominating
- Stronger crop in Germany limit intra EU trade demand in this large market
- Limited storage capacity in BE-NL leading to more intra-EU trade
- Impact of unprecedent low crop in Turkey : more purchase into EU , direct export to TK despite high duty - opportunity in Middle East & India for EU
- Expectation in Brazil after visit of Commissioner Hansen in Brazil for apples from BE and PL and for organic apples (IT)=> commitment by BR to revise procedure and costs of organic certification

Processing

- After high prices for producers last year, more pressure and lower prices for AJC & compote
- Recovery of orange juice supply in Brazil and Florida (mitigation of HLB) => 8-10% AJC substitution impact of the last years is removed. Uncertainties impact Trump tariff war with China
- Lower purchasing prices in different segments including AJC/NFC and compote

Apple export overview : season 2025/2026 (to week 12)

Trends up to week 12 (end of October) of the season 2025/2026 –Except Poland only to week 6 !!!

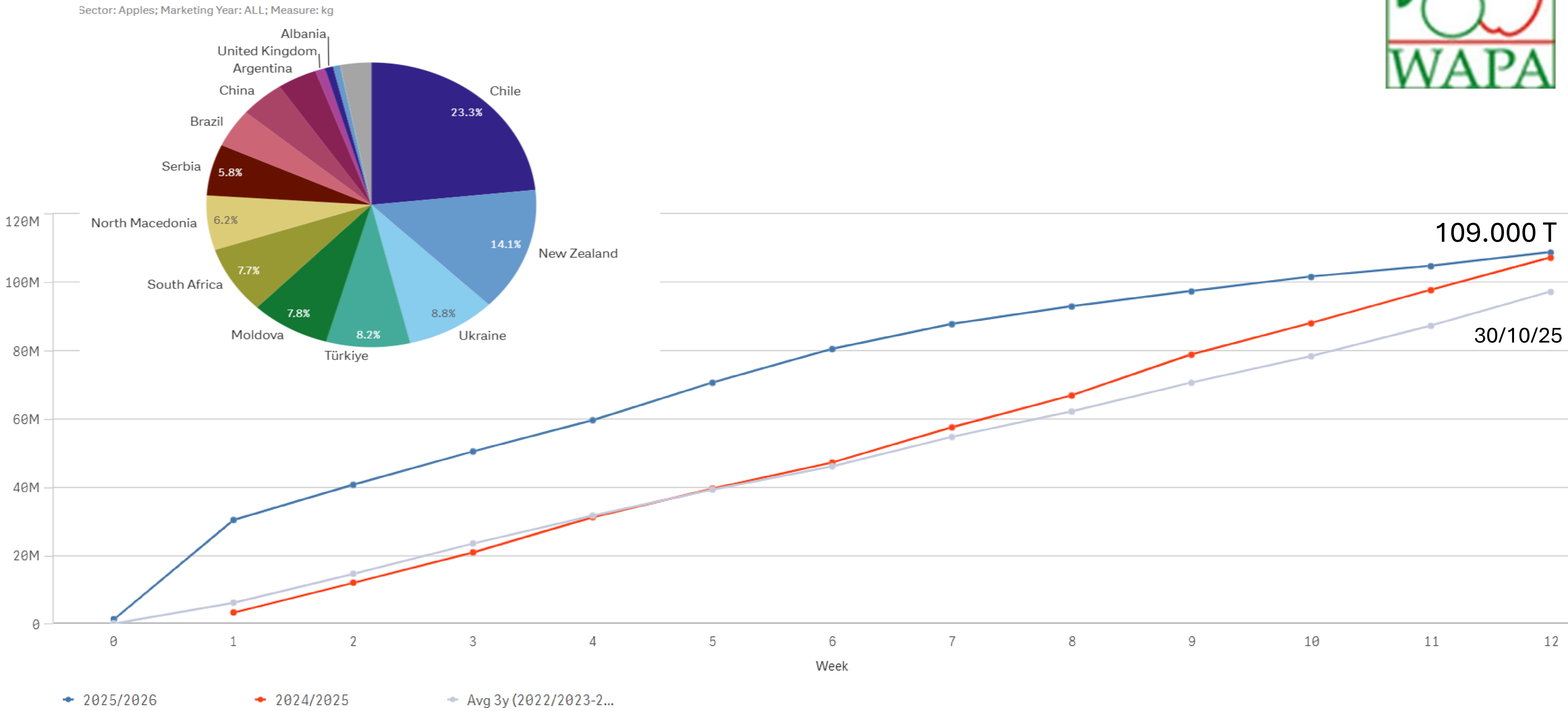
Slight growth of export (if simulating Poland to week 12 with Priorin data) => export likely to currently stand at ca 220.000 T (+20%) while prices are only marginally up in value (3%)

- Egypt, Libya, Middle East , India : performing well
- UK – Brazil : slowing down – Expectation of new market opening for BE, PL in Brazil and more facilitation for organic certification after HLM of Hansen in Brazil
- Below trends of export for **Italy** (largest exporters to TC) : upwards trends in volume, stable price

Ranking as kg of latest season	2024/2025			2025/2026			YOY%		
Week 12	Euro Value	kg	Av. Value	Euro Value	kg	Av. Value	Euro Value	kg	Unit Value
Total	66.816.102	64.152.698	1,04	92.343.689	89.022.450	1,04	+38,21%	+38,77%	-0,40%
Egypt	7.316.909	8.711.250	0,84	17.902.366	19.720.905	0,91	+144,67%	+126,38%	+8,08%
Saudi Arabia	13.848.825	12.585.974	1,10	18.646.782	16.903.424	1,10	+34,65%	+34,30%	+0,25%
Brazil	17.843.318	15.779.611	1,13	14.612.791	13.136.328	1,11	-18,10%	-16,75%	-1,63%
Israel	5.287.788	4.862.088	1,09	7.215.411	6.450.467	1,12	+36,45%	+32,67%	+2,85%
Switzerland	2.572.134	5.498.771	0,47	2.985.611	6.286.199	0,47	+16,08%	+14,32%	+1,54%
United Kingdom	6.257.463	5.188.085	1,21	5.568.909	4.327.389	1,29	-11,00%	-16,59%	+6,70%
United Arab Emirates	3.076.297	2.617.151	1,18	4.585.030	3.862.206	1,19	+49,04%	+47,57%	+1,00%
Libya	1.482.690	1.154.251	1,28	4.109.006	3.167.730	1,30	+177,13%	+174,44%	+0,98%
Norway	3.033.341	2.438.708	1,24	3.707.886	2.819.582	1,32	+22,24%	+15,62%	+5,73%
India	312.116	317.545	0,98	2.279.658	2.033.968	1,12	+630,39%	+540,53%	+14,03%
Colombia	1.222.688	1.045.128	1,17	1.682.490	1.434.456	1,17	+37,61%	+37,25%	+0,26%

Source: Freshfel Europe based on DG AGRI-TAXUD

Apple import :season 2025 -2026 to week 12



Source: Freshfel Europe – DG AGRI-TAXUD

Polish apples & pears: season 2025/2026 highlights

PL

Poland	Apple production (1.000 t)
By variety	
Source	TRSK
F2025 production (1.000 t)	3.300

Variety	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	YOY	3Y AVG
Annurca												
Boskoop							25					-100,0%
Braeburn												
Cortland												
Cox												
Cripps Pink												
Elstar	20	10										
Fuji												
Gala	340	320	360	250	290	340	390	400	350	370	5,7%	-2,6%
Gloster	180	160	180	140	150	200	140	120	120	120	0,0%	-5,3%
Golden Delicious	360	320	380	270	320	360	420	440	370	390	5,4%	-4,9%
Granny Smith												
Idared	700	400	800	350	410	460	430	370	320	320	0,0%	-14,3%
Jonagold	130	70	130	40	50	50	50	40	30	30	0,0%	-25,0%
Jonagored	350	250	400	100	110	110	110	90	60	60	0,0%	-30,8%
Jonathan												
Ligol	330	250	350	150	210	280	260	220	160	190	18,8%	-10,9%
Lobo												
Morgendurf/imperatore												
Pinova	35	30	60	40	55	90	100	100	90	100	11,1%	3,4%
Red Delicious	20	10	40	70	75	110	120	100	80	80	0,0%	-20,0%
Red Jonaprince	70	50	260	300	330	350	470	370	260	270	3,8%	-26,4%
Reinette Grise du Canada												
Shampion	500	400	550	400	410	450	440	410	350	370	5,7%	-7,5%
Spartan												
Stayman												
Other	1.000	600	1.300	800	1.000	1.500	1.540	1.310	1.000	1.000	0,0%	-22,1%
Other new varieties												
Total	4.035	2.870	4.810	2.910	3.410	4.300	4.495	3.970	3.190	3.300	3,4%	-15,1%

Source: WAPA – Prognosfruit 2025

Weather impact: Spring frost and unfavorable post-flowering weather limited crop potential. Dry June initially pointed to a modest harvest

Harvest timing: Picking started around the normal period, aligning with the 5-year average (unlike 2024, which was ca 2 weeks earlier).

Crop estimates:

- Early forecast: 3.3 million tons of apples and 100,000 tons of pears.
- Updated results: at least +10% higher than first estimates , potentially over 3.7 million tons => Improvement driven by July rainfall and increasing irrigation in orchards.
- As of 30 October, significant volumes still unpicked — shortage of labor/pickers due to lower initial expectations.

Varietal performance: Late varieties (Jonagold, Golden, Pinova, Idared) showed good size and yields thanks to September rains.

Fresh market:

- Early season: very strong prices — Polish apples were the most expensive in the EU until mid-September. However, sales slowed due to high grower price expectations.
- Current trend: Prices under pressure; difficult to find markets amid high EU production, even in Scandinavia.

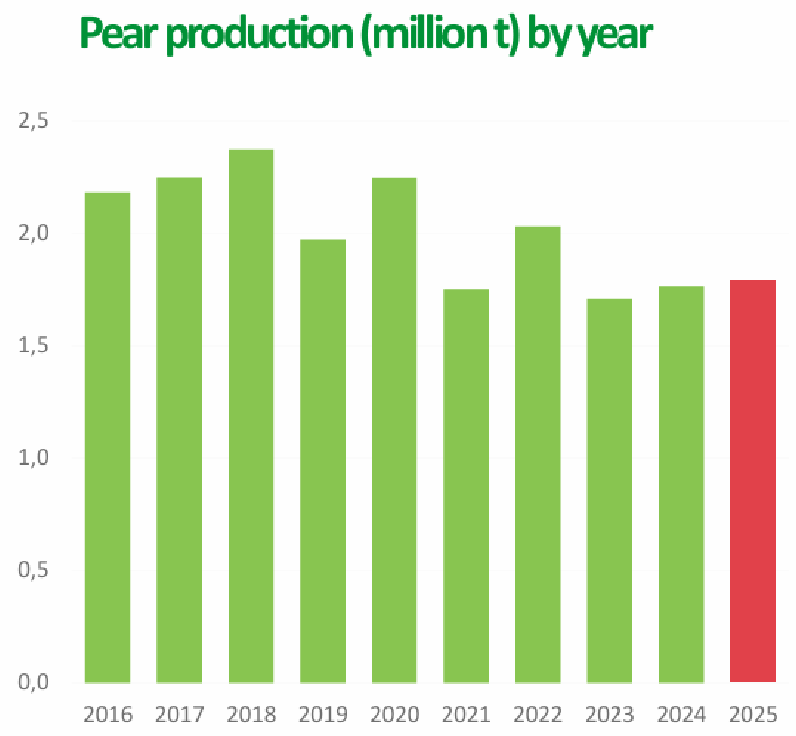
Industrial apple market: Prices stable last week of September at 0.15– 0.16 €/kg, then declined to 0.12 €/kg. Large supply likely to keep prices low into November.

Pears
Season 2025/2026

EU pear forecast : season 2025/2026

- 3rd consecutive crop of ca 1, 7 million T
- 4th lowest crop of the decade
- Long term trend: steady decline from peak 2,7 million T in 2010
- Varieties: dominated by conference with average crop at 850.000T , and still low production of Abate at 90.000 T
- Around 10% to processing (180.000 T) and 5% for organic (90,000 T)
- Lower production in EU Eastern neighborhood (UA, MD; RS) and higher in EU Western neighborhood (UK, CH)

Year	Volume (million t)
2016	2,18
2017	2,25
2018	2,37
2019	1,97
2020	2,25
2021	1,75
2022	2,03
2023	1,71
2024	1,76
2025	1,79



Year	Volume (million t)	VAR %
9Y AVG	2,03	-11,94%
5Y AVG	1,90	-5,87%
3Y AVG	1,83	-2,45%
2024	1,76	1,43%
2025	1,79	

Source: WAPA – Prognosfruit 2025

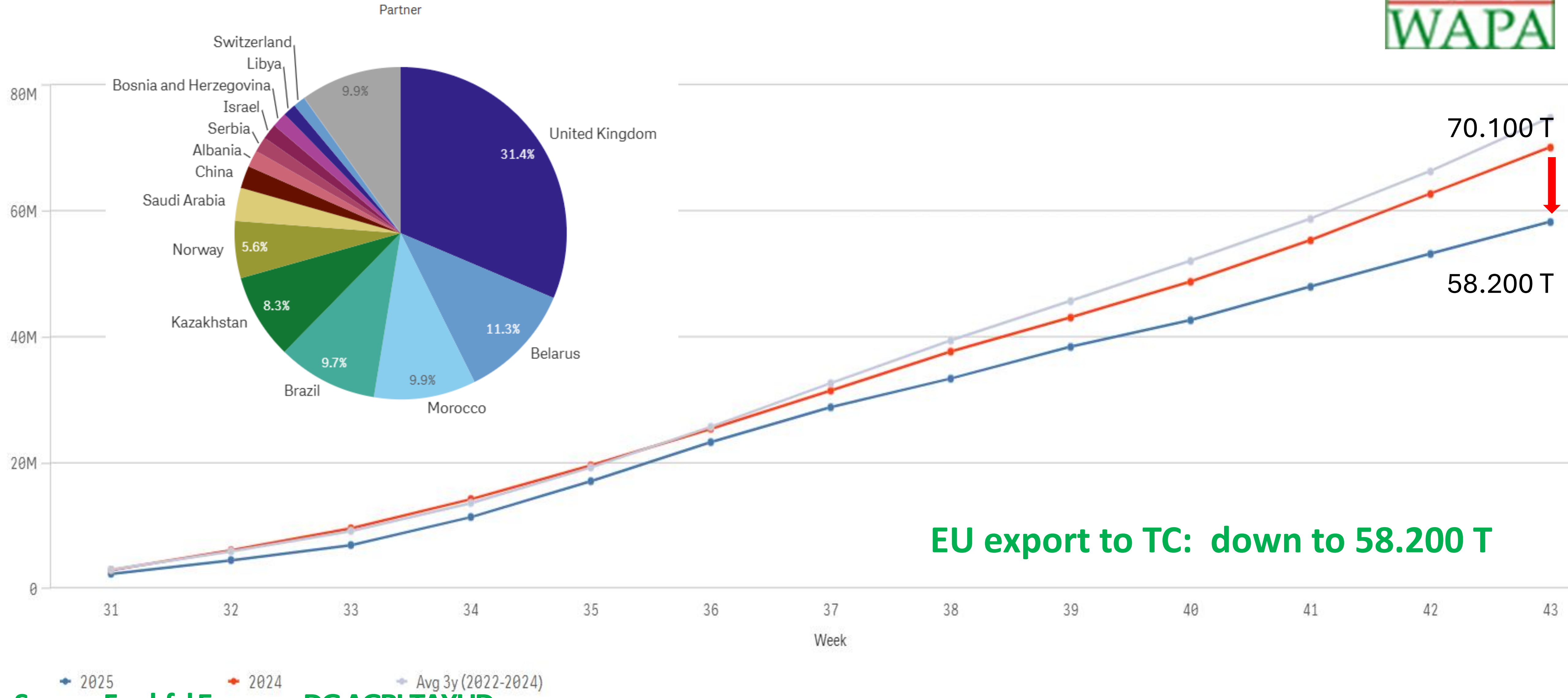
EU pear forecast for the 2025/2026 season

	2022	2023	2024	2025	YOY	3Y AVG
Belgium	346	381	269	355	32,07%	6,92%
Croatia	2	2	3	2	-1,98%	13,79%
Czechia	7	7	6	8	49,38%	27,62%
Denmark	7	7	7	7	0,00%	0,00%
France	147	104	137	140	2,05%	8,04%
Germany	36	38	39	44	12,82%	16,81%
Greece	99	61	71	57	-19,26%	-25,65%
Hungary	15	20	15	7	-53,33%	-58,00%
Italy	505	184	400	302	-24,68%	-16,93%
Latvia	1	0	0	0	-27,27%	-39,09%
Netherlands	352	358	322	348	8,07%	1,16%
Poland	95	100	100	110	10,00%	11,86%
Portugal	132	112	125	121	-3,05%	-1,55%
Romania	42	42	39	35	-10,00%	-14,04%
Slovakia	1	1	1	1	-15,99%	-2,41%
Slovenia	3	1	3	1	-80,51%	-73,31%
Spain	236	286	223	246	10,44%	-0,91%
Sweden	2	2	2	2	0,00%	0,00%
Total	**2.028**	**1.706**	**1.762**	**1.787**	**1,43%**	**-2,45%**

Source: WAPA – Prognosfruit 2025

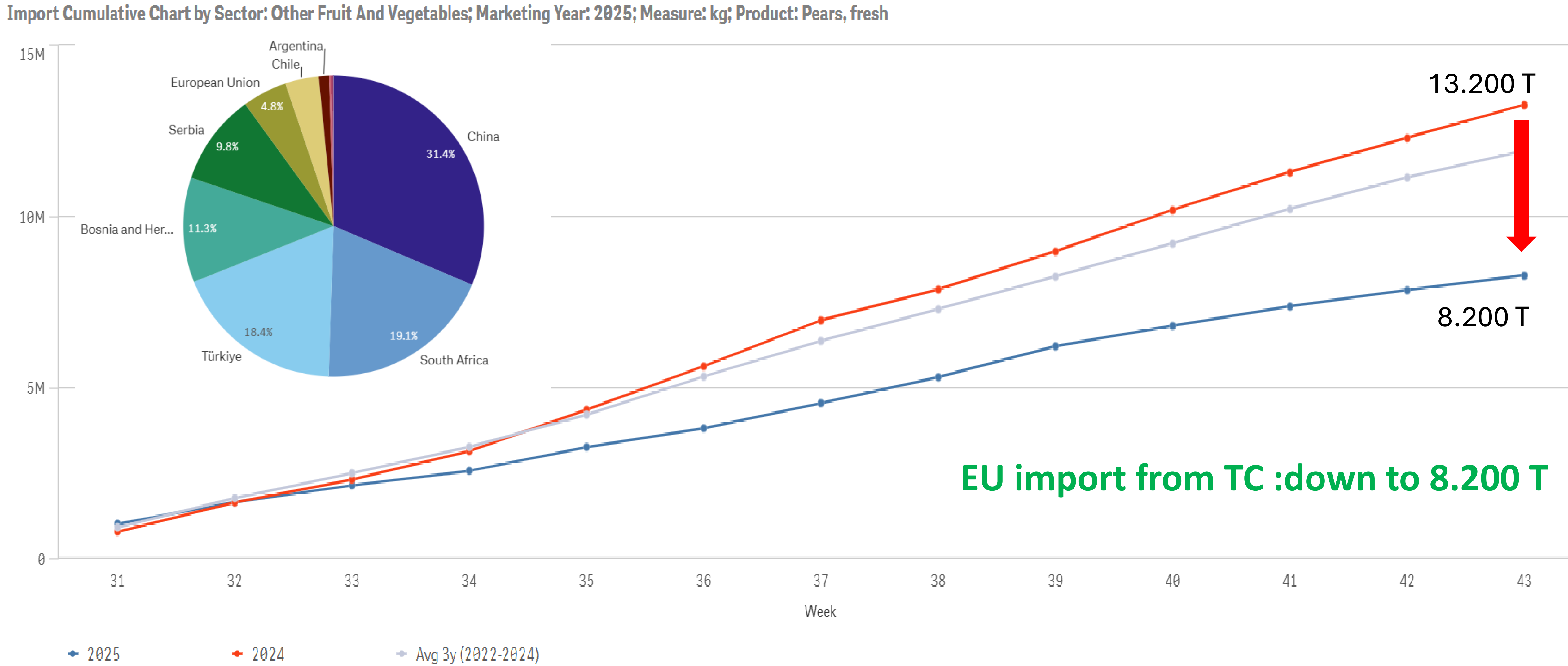
- BE and NL : both strong growth/recovery after last year peak low crop of the decade. New data for NL is 358.000 T and 380.000 T for Belgium
- Italy : new drop after partial recovery of last year. New figure is 293.000 T
- Poland : stabilization at production in Mazovia, . tand not impacted this year by climatic conditions
- Spain up and down may be some adjustment down still TBC
- Portugal Pera Rocha slightly below full potential
- **Total EU slighly up 1.800.000 T**

Pears export trade – season 2025/2026 to week 12 (30/10/25)



Source: Freshfel Europe – DG AGRI-TAXUD

Pears import trade – season 2025/2026 to week 12 (30/10/25)



Source: Freshfel Europe – DG AGRI-TAXUD

Prognosfruit 2026

Constance, Germany

5-7 August 2026

Welcome reception Schloss Mainau

Conference Bodenseeforum

Gala Dinner Konzil

Many thanks