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Report Highlights:

EU commercial apple production in Marketing Year (MY) 2022/23 is forecast at 11.9 MMT, an increase of 2.9% compared to the previous year. EU commercial pear production is expected to amount to 1.99 MMT, a rebound from the 14% lower crop in the previous year. EU commercial table grape production is forecast up 11.5% from the previous season at 1.57 MMT. However, the lack of seasonal workers and high energy prices may prompt farmers to leave some of their orchards unharvested. A higher than usual share of apples is expected to be diverted from the fresh market to the processing sector early in the season to avoid high storage costs.

This report covers the 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.**

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Abbreviations and terms not otherwise defined in the report:

EU	European Union – 27 EU member states: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, 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: For clarity variety names, chemical substances, and the Latin names of fungal diseases are displayed in *italics* in the text.

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Executive Summary

Apples

Commercial apple production in Marketing Year (MY) 2022/23 (July/June) is forecast at 11,880,870 MT an increase of 2.9% compared to the previous year and 7% compared to the average of the previous ten years. While growing conditions differed between the regions, high temperatures and drought were a common theme throughout most of the EU. In some countries this may result in smaller fruit size which in turn would lower final production numbers below the above stated estimate as smaller fruit weighs less. Additionally, a lack of seasonal harvest workers and high energy costs may prompt farmers to leave some of their orchards unharvested. Quality is expected to be good, as hail and frost damage remained very localized. Market prospects are mixed. Beginning stocks were very low for both fresh apples and concentrated apple juice. The latter is important as the processing sector absorbs significant amounts of low-quality apples. However, per-capita fresh consumption is expected to be under pressure in MY 2022/23 as inflation and high energy prices will leave consumers with less disposable income for food. Since 2014, U.S. apple exports to the EU are low due to technical issues linked to 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

MY 2022/23 (July/June) EU commercial pear production is forecast at 1,987,958 MT, an increase of 14% compared to MY 2021/22 when pear production was down due to a record low harvest in Italy. Italy, followed by the Netherlands, Belgium, Spain, and Portugal, continues to lead pear production in the EU. This year's growing season started out as a normal growing season but was followed by an exceptionally high number of very warm and sunny days during the spring and summer. Due to the abundance of sun this growing season, the sugar content of pears grown in the EU is high, meaning that the harvest has an excellent taste. Because of the drought, EU pears are expected to be (somewhat) smaller while the keeping quality could be negatively impacted. Picking started about two weeks earlier this season. For MY 2022/23 EU pear imports could be somewhat down and exports up due to the increased commercial production numbers for pears. If the keeping quality is good, relatively more EU pears are expected to end up on the EU fresh consumer market this Marketing Year. The impact of measures taken to combat the pandemic on international pear trade is not expected to have an impact in MY 2022/23. To date Brexit has not impacted EU pear trade. EU pear exports to Belarus and Ukraine dropped during the months of February, March, and April 2022, but picked up in May and June 2022, more information about the Belarusian embargo can be found in the Policy section.

Table Grapes

In MY 2022/23 (June/May), EU table grape commercial production is forecast up 11.5% from the previous season. This is mostly due to volume increases in Italy, made possible by ideal temperatures in May and June that favored fruit setting. Production increases are also forecast in France and Spain. Conversely, decreased volumes are forecast in Romania, Bulgaria, and Greece due to unfavorable weather. Overall, fruit quality is forecast to be excellent with higher sugar content due to hot temperatures in July, August, and early September. EU table grape imports from the United States are marginal. EU table grape exports to the United States are small.

Impact of Russia's Invasion in Ukraine

By far the biggest impact on EU markets for fresh deciduous fruit in MY 2021/22 and for MY 2022/23 comes from direct and indirect effects of Russia's invasion of Ukraine. Direct effects include the lack of seasonal workers from Ukraine (especially in Poland). Indirect effects are even more important and include increased production costs, due to increased prices for inputs such as plant protection products, fuel, and fertilizers. The increased electricity costs will translate into considerably higher storage costs. Additionally, the price-surge of all commodities affects consumption in the EU as well as demand in important export destinations. With high inflation and lower disposable income consumers often spend less on fruit. Furthermore, countries in Northern Africa that imported much of their cereal grains from Ukraine would now rather use precious international currency to import wheat and corn than fruit. Higher transportation costs and reduced availability of containers add to the negative effects on trade. Against this backdrop, effects on direct trade of deciduous fruit between Ukraine and the EU are of less importance.

COVID-19

With more and more people vaccinated and infections becoming less life threatening, EU member state governments revoked most COVID-19 prevention measures over the course of 2022. Examples of such measures included movement and occupancy restrictions, physical distancing, and masking requirements. As a result, the impact of COVID-19 on production and consumption waned and became less important than the ramifications of Russia's invasion of Ukraine. The lifting of COVID-19 control measures resulted in a rebound of consumption in the hotel restaurant, and institutions (HRI) sector.

Brexit

The UK is an important market for EU fruits. Consequently, the EU-27 fruit sector was relieved that the EU and UK negotiators reached a Trade and Cooperation [Agreement](#) (TCA) on December 24, 2020, that set out the rules on the new partnership between the EU and UK. These went into force on January 1, 2021, and initially resulted in some border disruption, delays, and stuck shipments that were subsequently resolved. However, the UK implemented a phased-in grace period through July 1, 2021, which was subsequently extended until July 1, 2022, and then extended again. Border disruptions for EU exports to the UK could occur once this grace-period ends and the UK requires phytosanitary certification and physical checks. For more details, please see policy section.

Section I: Apples

Table 1: Production, Supply, and Distribution - Apples

Apples, Fresh Market Year Begins	2020/2021		2021/2022		2022/2023	
	Jul 2020		Jul 2021		Jul 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
European Union						
Area Planted (HA)	505,872	484,630	506,136	496,620	0	486,000
Area Harvested (HA)	494,680	475,300	494,017	486,450	0	478,700
Commercial Production (MT)	10,529,496	10,835,868	11,004,850	11,550,360	0	11,880,870
Non-Comm. Production (MT)	1,189,672	1,098,795	872,200	727,000	0	891,000
Production (MT)	11,719,168	11,934,663	11,877,050	12,277,360	0	12,771,870
Imports (MT)	324,600	324,625	335,000	331,419	0	320,000
Total Supply (MT)	12,043,768	12,259,288	12,212,050	12,608,779	0	13,091,870
Domestic Consumption (MT)	10,959,668	11,175,674	11,142,050	11,459,438	0	11,841,870
Exports (MT)	1,084,100	1,083,614	1,070,000	1,149,341	0	1,250,000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	12,043,768	12,259,288	12,212,050	12,608,779	0	13,091,870
(HA),(1000TREES),(MT)						

Not official USDA data. Sources: Area planted for MY 2020/21 and 2021/22: Eurostat; trade for MY 2020/21 and 2021/22: Trade Data Monitoring, LLC (TDM) accessed on September 28, 2022; All other: FAS EU posts

Apples - Commercial Production¹

The EU is one of the leading producers and consumers of apples in the world. Commercial apple production exists in all member states (MS), except for Malta. However, 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 80% of the total EU commercial apple production.

Area

EU harvested apple area showed a small decline of 1.1% in MY 2022/23. Mostly a result of reductions in Poland, Germany, France, Hungary, and Belgium. Smaller reductions were recorded in Austria, Lithuania, Bulgaria, the Netherlands, and the Czech Republic. Only in Italy area increased.

- In Poland apple area diminished in comparison with the previous year as some growers abandoned production in favor of other fruits, mainly cherries.
- Apple area in Austria is on a declining trend. Within the last ten years, Austrian apple area declined by about 20%. Poor crops in subsequent years and the lack of water for irrigation (due

¹ Commercial apple production includes commercially grown apples for the fresh market (table apples) as well as for processing.

to strict Austrian water regulations) to secure yields by frost prevention irrigation and irrigation during droughts are the drivers for this development.

- In the Netherlands, growers are either leaving the business or are moving into the production of *Conference* pears because of higher profitability.

Production

Commercial apple production in MY 2022/23 is forecast to increase by 2.9% compared to the previous year. The majority of the increase is projected for Poland, France, and Italy with roughly 332,600 MT, 107,000 MT, and 97,000 MT additional production, respectively. In France and Italy this is a rebound from the low production in the previous year, while in Poland the replacement of old orchards with new more productive ones adds to the production increase. Production is also forecast to increase in Austria, Germany, Greece, Slovenia, the Czech Republic, Denmark, and Sweden, but with lower volumes. The combined increase more than compensates for lower production forecasts elsewhere, most notably in Hungary, Spain, Portugal, Romania, and Belgium with projected reductions of roughly 155,000 MT, 132,000 MT, 49,000 MT, 40,000 MT, and 31,000 MT respectively.

While growing conditions differed between the regions, the high temperatures and drought were a common theme throughout most of the EU. These factors may result in smaller fruit size which in turn would lower final production numbers below the above stated estimate as smaller fruit weighs less. Quality is expected to be good, as hail and frost damage remained very localized.

High electricity prices drive up costs for cold storage which may prompt producers to divert a higher share of lower value fruit (e.g., smaller or over-sized fruit, fruit with little color, less popular varieties) into processing than usual.

Organic Production

Organic production is a growing segment in the EU deciduous fruit sector; however, data is not available for all member states. According to Eurostat, in 2020 (latest available data), the five member states with the largest organic apple acreage were France, Italy, Germany, Poland, and Hungary, together accounting for 75% of organic apple area. At the same time, Denmark, France, Austria, and Germany showed the highest percentage of their apple acreage devoted to organic production.

At Prognosfruit², EU organic production was forecast to increase to 658,000 MT compared to 626,000 MT in 2021. While this is an increase of 5.1% year on year, organic production contributes to only 5.4% of commercial apple production. A share that is still considerably below the EU's 25% target but projected to increase. However, industry sources are concerned that at the projected pace of the increase in EU organic apple production could soon outpace the growth in consumption.

² 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-27 Commercial Apple Production by Country and Year in MT

COUNTRY	2020/21	2021/22	2022/23 e	Change 2022:2021	Share of Total Production in 2022
Poland	3,555,200	4,067,400	4,400,000	8%	37%
Italy	2,123,640	2,052,779	2,150,220	5%	18%
France	1,322,000	1,316,000	1,423,000	8%	12%
Germany	1,023,316	1,004,625	1,051,000	5%	9%
Spain	445,500	563,000	431,000	-23%	4%
Romania	400,000	440,000	400,000	-9%	3%
Hungary	368,836	475,710	321,000	-33%	3%
Greece	303,577	272,065	310,000	14%	3%
Portugal	286,080	342,860	294,000	-14%	2%
Netherlands	220,000	243,000	245,000	1%	2%
Belgium	161,000	245,000	214,000	-13%	2%
Austria	160,053	152,171	208,000	37%	2%
Czech Republic	115,585	114,958	127,950	11%	1%
Croatia	63,614	59,131	56,200	-5%	0.47%
Slovenia	66,124	23,011	55,000	139%	0.46%
Bulgaria	36,274	40,930	41,000	0%	0.35%
Slovak Republic	28,429	31,000	34,000	10%	0.29%
Sweden	32,000	27,000	30,000	11%	0.25%
Lithuania	60,000	32,000	28,000	-13%	0.24%
Denmark	24,000	18,000	24,000	33%	0.20%
Ireland	19,470	19,830	20,000	1%	0.17%
Latvia	14,000	10,000	10,000	0%	0.08%
Finland	7,170	7,890	7,500	-5%	0.06%
Total	10,835,868	11,558,360	11,880,870	2.8%	

e= estimated; Note: The table is grouped by ranking in MY 2022/23. Due to rounding percentages add up to marginally more than 100%. Source: FAS EU posts

- In Poland, weather conditions were favorable during the winter of 2021/22. Abundant rainfall in the fall of 2021, supported sufficient water accumulation in the soil's deeper layers and frost damage was insignificant. Flowering and pollination were good, despite drought conditions in March, which delayed development. This resulted in abundant fruit set. Due to a shortage of seasonal workers, it is likely that farmers will only partially harvest their orchards. Should that occur, they will focus on the orchards with the best quality apples and the most popular varieties. Fruit quality is very good. However, the fruit size is on average smaller than usually due to abundant crop. One of the biggest apple producers' concerns was the sharp price increase of production inputs, mainly energy, fertilizers, and pesticides. The progressive restriction of authorized crop protection products is also a major setback for producers. In 2022, the Polish government launched a mechanism for emergency adjustment aid for apple producers. Aid to

producers comes from the national budget. The rationale for launching the mechanism is Russia's invasion of Ukraine and related import restrictions imposed by Belarus. The *Ordinance of the Council of Ministers of April 22, 2022, Journal of Laws item. 879*, establishes financial assistance for dessert apple producers and is prompted by low apple prices in Poland and export difficulties due to the international situation. Since the purchase prices of fruit for processing are much lower than those for dessert fruit, apple producers using the mechanism will receive a surcharge on the price offered by the processing industry. The intervention mechanism involves the diversion of dessert apples for processing and covers a total of 200,000 MT from the 2021 harvest. The aid funds have been paid by the Agency for Restructuring and Modernization of Agriculture until September 30, 2022.

- Italy's apple production is forecast to increase by 4.7 percent compared to MY 2021/22 thanks to ideal weather in the spring through the beginning of July, which allowed for excellent fruit growth. Quality is expected to be excellent. Producers are challenged by increased input and packaging costs due to the geopolitical instability (approximately €10 cents/kg) and skyrocketing costs of freight rates and reduced container availability.
- The French apple crop in MY 2022/23 is expected to increase by 8% and be close to the five years average. This compares to an extremely short crop in MY 2021/22 due to frost losses. Little frost was reported this year, but the fruit suffered from the drought and excessive heat that prevailed during the summer in almost all French regions. It will lead to smaller sized fruit. France prohibited the use of plastic packaging for apples (when sold in quantities below 1.5 kilograms) as of January 1, 2022. It also prohibited the affixing of non-home-compostable stickers on apples. For more information see [Gain Report FR2021-004](#).
- In Germany, favorable weather during flowering and lack of frosts led to a projected moderate production increase of 5%. However, high temperatures and lack of rain in June, July, and August may have led to a reduction in fruit size which would require a downward adjustment of the final production volume. Fruit quality is expected to be excellent with good color. In addition to the general increase in production costs, German farmers faced increased labor costs resulting from an increase in the minimum wage. From January 1, 2021 to October 1, 2022, the minimum wage (which also applies to seasonal labor) increased in five installments from 9.50 euro to 12.00 euro per hour.
- Spain expects a significantly lower production compared to the previous year. The unprecedented high temperatures that prevailed this summer have reduced the caliber of the fruit. Moreover, spring frosts reduced yielding potential in the Ebro Valley, combined with hailstorms across the country. In Murcia, the March and April rains impeded proper fruit setting causing poor pollination.
- In Romania, apple production is forecast to drop by 10% percent from last year due to reduced rainfall and hot temperatures. In certain areas, average fruit size will be lower due to lack of rainfall. Late frost and hail have only sporadically affected orchards. Fruit quality is expected to be good. Apart from general cost increases, growers will be affected by a labor shortage. This will likely force farmers to speed up investment in mechanized fruit picking. It is becoming

increasingly hard for growers to match the expectations of the seasonal workers in terms of payments and other benefits.

- Hungary expects significantly (almost 33%) lower production compared to the previous year. This is a result of weak bud load in the spring of 2022 that was related to severe drought in the summer and fall of 2021. Additionally, while frosty nights just before the beginning of flowering did not cause drastic and clearly visible flower damage, they latently hindered fruit setting. This resulted in a significant fruit fall in June. Later in the growing season, periods of extreme drought made the situation worse, particularly during the summer. More than two-thirds of orchards do not have irrigation and/or intensive growing systems. Therefore, Hungary's apple production is quite exposed to adverse weather conditions, like droughts. About 60-70% of the production is destined for industrial use.

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 Germany and Belgium. In contrast, *Gala* achieves its position as the second most produced apple in the EU by being grown in numerous MS rather than dominating in a few. *Idared*, which was one of the most grown varieties in Eastern Europe prior to the Russian import ban³ is still the number one variety in Hungary but dropped to number two in Poland and Romania.

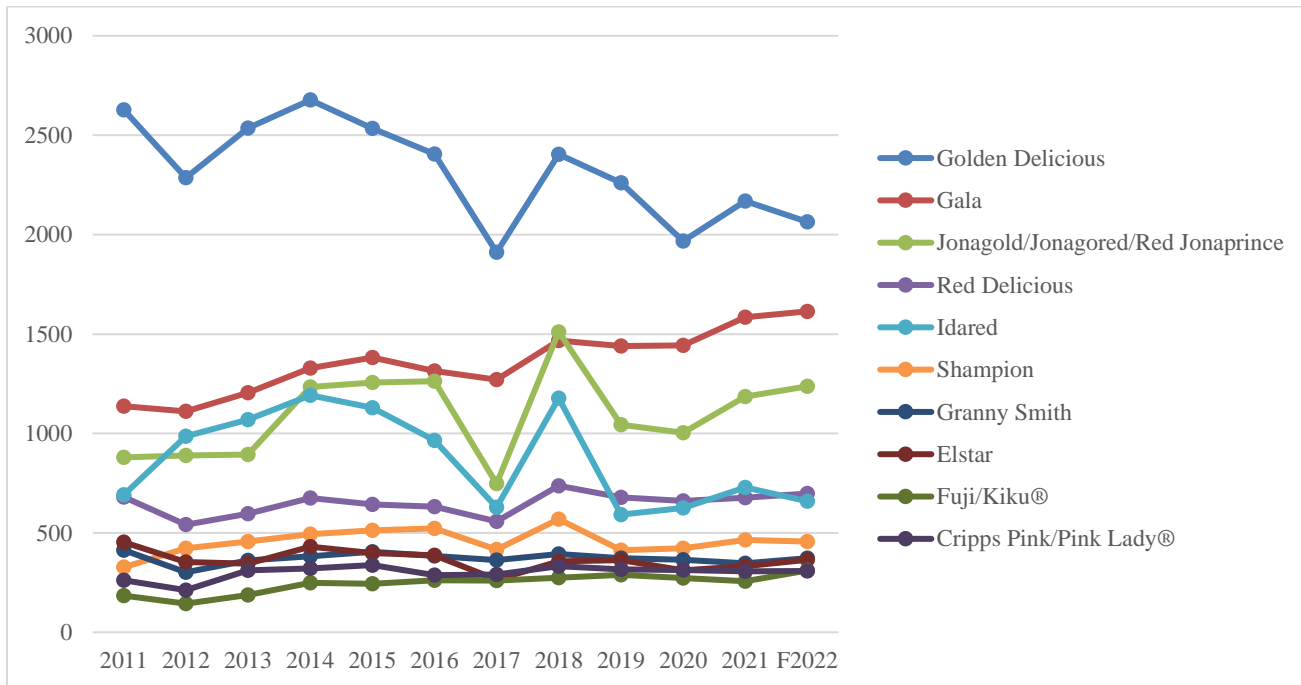
New varieties, for example *Pink Lady*®, *Kanzi*®, *Rubens*®, *Tentation*®, *Wellant*, *Cameo*, and *Kiku*®, have increased their share of production in recent years. Among these, trademark protected “Club⁴”-varieties are gaining traction. Denmark, the Netherlands, and Slovakia have the highest share of “new” varieties in their production portfolio with 28%, 12%, and 10% of their respective total production.

Varieties that are resistant 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 growing organic production sector. Examples of such varieties include *Topaz* and *Santana*.

In Poland, apple growers are replacing older orchards with newer, more popular varieties, such as *Shampion*, *Gala*, *Golden Delicious*. This is contributing to the replacement of *Idared*, which used to be the dominant variety grown in Poland before Russia imposed an import ban on the EU in 2014.

³ See policy section

⁴ Club varieties are managed and grown under a licensing agreement with plant breeders or variety consortia. The licensing agreements usually restrict planted area and includes variety specific quality and marketing rules.

Chart 1: EU27+UK⁵ Apple Production for Top 10 Varieties in 1000 MT

F = forecast; Source: FAS EU based on World Apple and Pear Association (WAPA) data

Apples - Non-commercial Production

Non-commercial production in MY 2022/23 is estimated to increase by 23% compared to the MY 2021/22 harvest. This is mostly due to a rebound in Germany and Austria that more than compensates for reductions in Romania and Hungary, and to a lesser extent in Slovakia and Croatia. Non-commercial production tends to alternate between good and poor crop years. However, most EU member states do not report estimates for non-commercial production. As a result, the production figure provided in the PSD table at the beginning of the apples' section is a rough estimate based on industry rather than official information. In MY 2022/23, non-commercial production represents about 7% of total apple production, compared to 6% 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 the 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-27 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, EU-27 apple stocks amounted to 531,282 MT on July 1, 2022, compared to 454,798 MT at the same time in 2021. 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 have a detrimental effect on the prices for the new harvest. In this report, stocks are included in the “fresh domestic consumption” line in the PSD.

Apples – Consumption

Apples are the most popular fruit in all member states except for Spain, where oranges are number one. However, per capita consumption of apples has been decreasing in recent years as consumers eat more soft fruit instead (for example in Germany) or stone fruit (for example in Spain). Per capita consumption is expected to be under pressure in MY 2022/23 as consumers have to spend a higher share of their income on energy and have less disposable income for food.

Apples - Processing

In MY 2022/23, processing use of apples is expected to increase by 12.5% compared to MY 2021/22, amounting to roughly 4.4 MMT. The increase is a result of the high energy prices that drive up storage costs and prompt farmers and farm cooperatives to only put the best qualities into storage and divert the lower qualities to processing. However, this masks opposite developments in some MS. Volumes going into processing are expected to increase in Poland, Germany, Austria, France, Italy, Slovenia, Spain, and Slovakia, and to decrease in Hungary, Romania, Lithuania, and Portugal.

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 the Scandinavian countries to over 60% in Poland.

The processing share also varies from year to year. The EU-27 average share of apples going into processing is forecast to amount to about 39% of total supply in MY 2022/23 compared to 31% in the previous MY. Major member states with apple processing include Poland, Germany, Italy, Romania, Hungary, France, Austria, Spain, and the Czech Republic (in order of descending volume in MY 2022/23).

Table 3: Volume and Share of Apples for Fresh Consumption and Processing

	MY 2020/21		MY 2021/22		MY 2022/23f	
	MT	Share	MT	Share	MT	Share
Fresh	7,247,916	68%	7,528,838	69%	7,098,170	62%
Processed	3,927,758	32%	3,930,600	31%	4,423,700	39%
Total	11,165,674		11,459,438		11,521,870	

F = forecast; Source: FAS EU Posts

Apples – Trade

The majority of trade occurs among the EU member states. Over the past five years, on average about 1.9 million MT of apples were traded between EU member states, while roughly 320,000 to 390,000 MT were imported from outside the EU. In recent years, imports from outside the EU contributed between 3% and 5% of the total EU apple supply.

EU external trade

EU-27 – UK trade

EU-27 apple exports to the UK fluctuated between 180,000 to 195,000 MT in the past five years. The main EU apple exporters to the UK included France, Italy, Poland, Spain, Belgium, Germany, and the Netherlands. The UK is a particularly important destination for French and Spanish apple exports, as it is the number one and number two export destination for these two countries, respectively. UK exports to the EU-27 were much lower, between 10,400 and 26,000 MT, with the vast majority going to Ireland. Trade flows exhibited change from January 1, 2021, when the UK departed the EU single market and customs union. An increase of apple imports into Ireland occurred from other member states, particularly France, Poland, and Belgium, to avoid the need for Brexit-related paperwork now required when shipping to Ireland via the UK.

Apples - Imports

For MY 2022/23, EU-27 imports are expected to decrease by 3.4%. The largest drop is expected in France and Greece, while Belgium and Hungary expect higher imports as a result of lower domestic production.

In MY 2021/22, about 63% of EU-27 apple imports originated from the southern hemisphere (Chile, New Zealand, South Africa, Argentina, and Brazil) and occurred mostly counter seasonally to European production. The Netherlands was by far the largest importer of apples, accounting for 33% of the EU-27 imports. However, much of the volume entering the Netherlands is not consumed there but is eventually transshipped to other member states. Other important importing countries included France, Bulgaria, Germany, Greece, Belgium, and Ireland.

The United States lost the EU market 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 MRL for DPA was lowered in March 2014 only exporters with designated DPA-free facilities are able 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. In previous marketing years, the Netherlands, Spain, and Italy also imported apples from the United States, albeit in negligible amounts.

Table 4: EU27 Imports of Apples in MT

Country of Origin	MY 2019/20	MY 2020/21	MY 2021/22	Change MY 2021/22 To MY 2020/21	Share of Total Imports in MY 2021/22
Chile	112,546	101,972	116,895	15%	35%
New Zealand	74,907	54,370	53,266	-2%	16%
North Macedonia	44,314	40,174	51,730	29%	16%
South Africa	29,436	36,955	40,696	10%	12%
Serbia	39,475	22,838	16,108	-29%	5%
Moldova	5,297	760	8,997	1084%	3%
Argentina	16,528	11,982	8,814	-26%	3%
United Kingdom	21,544	28,628	7,800	-73%	2%
Albania	8,029	3,083	7,766	152%	2%
Brazil	9,388	13,146	7,539	-43%	2%
Ukraine	7,248	3,692	6,945	88%	2%
United States	0	0	18	n/a	0.01%
Other	9,106	7,011	4,845	-31%	1%
World total	377,818	324,611	331,419	2%	

Note: The table is grouped by ranking in MY 2021/22. Due to rounding percentages add up to marginally below 100%. Source: TDM, LLC accessed on September 13, 2022

Apples - Exports

In MY 2022/23, EU apple exports are forecast to increase by about 100,000 MT (translating into an increase of 8%) as a result of the higher production in Poland and Belgium. In MY 2021/22, Poland, Italy, France, Spain, and Greece, were the top five member states when it comes to EU apple exports to destinations outside of the EU, they accounted for 34%, 34%, 14%, 6%, and 6% of total EU apples exports, respectively. The large drop in exports to Belarus is a result of a Belarussian import ban against apples from certain EU member states between January and April 2022.

In response to the Russian import ban, EU exporters looked at increasing exports to other destinations (Eastern Europe, Northern Africa, the Middle East, and Brazil) with varying success. Those countries that were most successful either have 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, France, Spain, Belgium, Germany, and Greece are now exporting to India. France was able to increase its exports to Northern Africa, the Middle East, and Asia, as a result of intensified promotional activities in those regions. Since the start of the pre-clearance program in October 2014, Italy and France are eligible for export to the United States. In MY 2021/22, France exported 24 MT to the United States. Poland has concluded agreements with Vietnam and several other Asian countries.

Table 5: EU-27 Exports of Apples in MT

Country of Destination	MY 2019/20	MY 2020/21	MY 2021/22	Change MY 2021/22 To MY 2020/21	Share of Total Imports in MY 2021/22
Egypt	250,751	264,952	302,268	14%	26%
United Kingdom	184,837	189,935	195,737	3%	17%
India	48,111	54,322	90,784	67%	8%
Saudi Arabia	78,845	63,897	82,101	28%	7%
Belarus	152,187	117,715	63,993	-46%	6%
Kazakhstan	59,798	49,390	58,919	19%	5%
United Arab Emirates	37,736	27,876	35,446	27%	3%
Norway	32,967	36,512	31,500	-14%	3%
Israel	21,757	25,572	31,239	22%	3%
Jordan	40,118	37,321	27,005	-28%	2%
Colombia	19,188	13,859	16,318	18%	1.4%
Switzerland	18,580	16,627	16,230	-2%	1.4%
Mongolia	7,985	7,554	15,511	105%	1.3%
Bosnia and Herzegovina	18,197	11,280	12,106	7%	1.1%
Libya	10,969	8,131	10,671	31%	0.9%
United States	22	101	72	-29%	0.01%
Other	216,496	159,049	159,441	0%	13.87%
World total	1,198,544	1,084,093	1,149,341	6%	

Note: The table is grouped by ranking in MY 2021/22. Due to rounding percentages add up to marginally less than 100 percent. Source: TDM, LLC accessed on September 13, 2022

The five largest EU exporters, together accounting for 93% of EU apple exports in MY 2021/22, were Poland (mostly to Belarus, Kazakhstan, Egypt, Jordan, and the UK), Italy (to Egypt, Saudi Arabia, India, The UK, and Norway), France (mainly to the UK, UAE, Saudi Arabia, Colombia, Vietnam, and India), Spain (mostly to the UK, Morocco, Mauritania, Colombia, and Brazil), and Greece (mainly to Egypt, Jordan, Albania, Saudi Arabia, and Israel).

In some large foreign markets, EU and U.S. suppliers compete. These include:

Market	EU countries competing with U.S. apples
Saudi Arabia	Italy, France, Greece, Poland, Spain
UAE	France, Italy, Spain
India	Italy, Poland, France, Belgium, Spain

Apples – Additional Information

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

Section II: Pears, Fresh

Table 6: Production, Supply, and Distribution – Pears

Pears, Fresh	2020/2021		2021/2022		2022/2023	
Market Year Begins	Jul2020		Jul2021		Jul2022	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	111,959	110,863	111,838	111,352	0	110,460
Area Harvested (HA)	107,678	106,931	106,695	106,763	0	107,027
Commercial Production (MT)	2,246,156	2,241,957	1,623,531	1,746,473	0	1,987,960
Non-Comm. Production (MT)	134,924	131,535	103,475	96,642	0	95,080
Production (MT)	2,381,080	2,373,492	1,727,006	1,843,115	0	2,083,040
Imports (MT)	174,600	174,631	185,000	186,303	0	165,000
Total Supply (MT)	2,555,680	2,548,123	1,912,006	2,029,418	0	2,248,040
Domestic Consumption (MT)	2,181,280	2,173,154	1,612,006	1,682,125	0	1,888,040
Exports (MT)	374,400	374,969	300,000	347,293	0	360,000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	2,555,680	2,548,123	1,912,006	2,029,418	0	2,248,040
(HA), (1000TREES), (MT)						

Not official USDA data. Sources: Trade for MY 2020/21 and 2021/22: Trade Data Monitoring, LLC (TDM) accessed in September 2022; All other: FAS EU posts

Pears – Production

Pears – Commercial Production

This year's growing season differed from last year's. Last year's growing season was characterized by low temperatures, especially in the southern part of the EU; lots of rainfall throughout the EU; and severe frost during flowering, particularly in Italy. In contrast, this year's growing season started as a normal growing season with no widespread damage from frost throughout the EU. The last part of spring and summer had an exceptionally high number of very warm and sunny days, with extremely high temperatures measured in many countries. An abundance of sun increased the sugar content in EU pears, resulting in an excellent taste. It was also one of the driest summers and, as a result, EU pears are expected to be (somewhat) smaller than average. The drought (and high temperatures) could potentially negatively impact the keeping quality of this year's harvest. Pear picking started about two weeks earlier this season. Except for the Iberian Peninsula, flowering was normal to abundant, fruit setting was normal, and the physiological drop (the process where leaves, small pears, and small branches fall of the tree) was normal and in some countries, like the Netherlands, abundant.

In MY 2022/23 EU commercial pear production is forecast at 1,987,960 MT, an increase of 14% (or 241,487 MT) compared to MY 2021/22, and an increase of only 3% compared to the average of MY 2019/20, MY 2020/21, and MY 2021/22. Italy, the Netherlands, Belgium, Spain, and Portugal

continue to lead pear production in the EU and combined, represent 79% of total EU commercial production in MY 2022/23. The Netherlands and Belgium saw their combined pear harvest decrease by 3%. Commercial production in Italy and France recovered from a (very) poor season last year, whereas Italian production has not yet reached its full potential. Commercial production estimate for the Iberian Peninsula presented a significant decrease of one-fifth compared to last year's figures.

Between MY 2015/16 and MY 2019/20, the total EU area harvested remained relatively unchanged – at almost 110,000 hectares. However, in MY 2020/21 the area harvested decreased by over 2,976 hectares (or 3%), driven by reduced harvested areas in Spain and Italy. Since MY 2020/21, the harvest area has remained stable at an estimated 107,000 hectares.

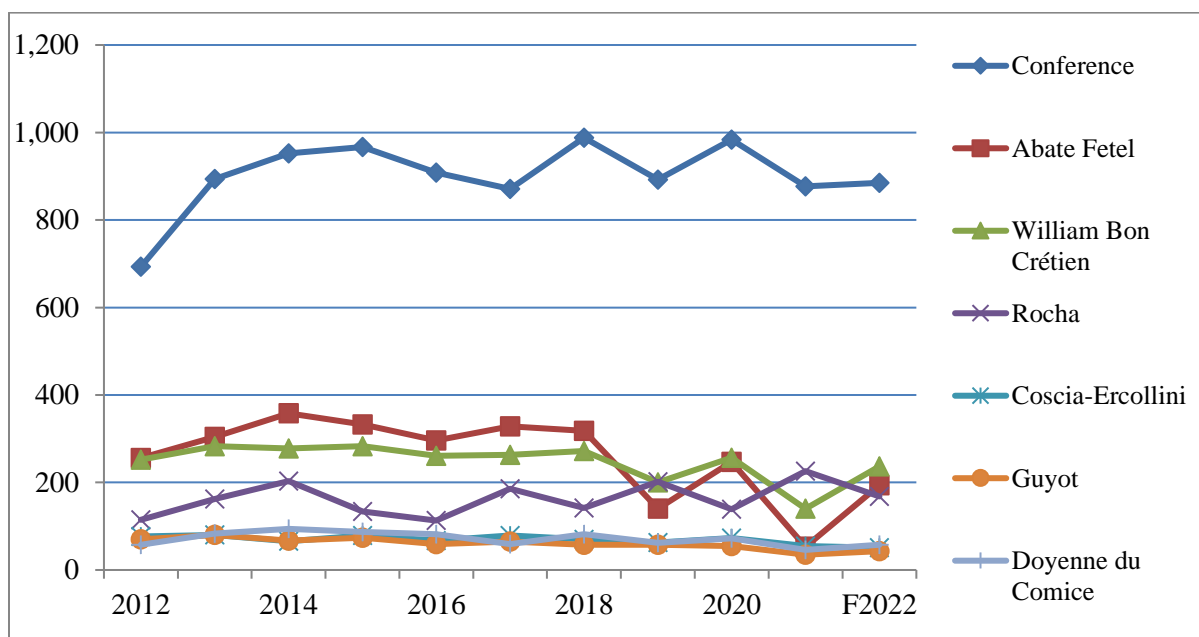
Table 7: EU Commercial Pear Production by Country and Year in MT

	MY 2020/21	MY 2021/22	MY 2022/23e	Change 2022:2021	Share of Total EU Production in 2022
Italy	611,000	202,000	474,000	135 %	24 %
The Netherlands	400,000	340,000	368,000	8 %	19 %
Belgium	383,000	350,000	300,000	-14 %	15 %
Spain	302,707	308,000	256,000	-17 %	13 %
Portugal	139,000	225,000	167,000	-26 %	8 %
France	144,000	65,000	140,000	115 %	7 %
Poland	65,000	70,000	90,000	26 %	5 %
Greece	81,335	75,698	80,000	6 %	4 %
Germany	39,270	37,160	37,000	0 %	2 %
Romania	22,000	23,500	22,500	-4 %	1 %
Hungary	17,199	16,200	16,800	4 %	1 %
Other	41,446	33,915	36,660	8 %	2 %
Total Production	2,241,957	1,746,473	1,987,960	17 %	

e = estimated; Source: FAS EU posts

- With approximately 27,000 hectares of pear orchards Italy is the EU the member state with the largest pear area planted. For the past few years, the planted area of pears dropped slightly, and this development is mainly the result of an infestation of the brown marmorated stink bug in 2019, an outbreak of brown spot disease in 2020, and a severe frost during flowering in 2021. This year, Italy is again the largest producer of pears with the Northeast and Emilia-Romagna being the main pear producing areas. Pear production is forecast to significantly recover from the last year's poor season, but is still far off its full potential, due to low temperatures at the beginning of the growing season followed by a drought in the summer that hindered fruit development. Quality is expected to be good to excellent. Production increases are expected for all varieties, which are led by *Abate Fetel* and *William Bon Crétien/Bartlett*.

- The planted area for pears in the Netherlands has grown year-by-year and surpassed 10,000 hectares three years ago. Acreage is forecasted to stabilize at 10,100 hectares. An 8% increase in Dutch pear production, composed mainly of *Conference* pears, is expected due to more pears per tree. This is a direct result of an overall favorable growing season – flowering was abundant, fruit setting was normal, and the physiological drop was abundant. Hailstorms in mid-July did not result in permanent damage to Dutch pears while a hailstorm in early September affected only an area of 350 hectares and amid harvesting. Due to the abundance of sun during the growing season, the taste is expected to be outstanding. The drought and high temperatures do not seem to impact yield but potentially could negatively impact the keeping quality of this year's harvest.
- After 20 years of growth, over the past two years the planted area in Belgium stabilized around 10,500 hectares. Belgian pear production, which is mainly composed of *Conference* pears, is concentrated in Flanders and is expected to decrease by 50,000 MT, or 14%. Due to the drought and heat waves the harvested pears are expected to be smaller especially for pears from orchards where irrigation is not possible. The physiological fruit drop in June, meaning that the trees discarded some unripe pears, was normal. Heavy rainfall in early September did not impact the yield. Due to increasing energy prices, the cost of storing pears after harvesting will double or even triple compared to last year. Several growers in Belgium decided to not harvest small sized pears (whose prices will be lower than good sized pears) as it will not be economically viable to store these pears given the increased costs of storage. The taste of Belgian pears is expected to be excellent this year, due to the abundance of sun.
- In Spain, between 2009 and 2019, total planted area decreased by 26%, standing at 20,015 ha in 2021 as stone fruit orchards replaced pear orchards. For the past two years, area planted stabilized at just over 20,000 hectares. For MY 2022/23, commercial pear production is forecast to decline by 17%, which is the direct result of a lower yield. Frost in the Ebro Valley and Catalonia and hailstorms across the country in March and April impeded proper fruit setting causing poor pollination. The unprecedented high temperatures during the summer have reduced the fruit size. The taste of Spanish pears is expected to be good this year.
- The Portuguese pear sector continues to be committed to improving itself by increasing investment in innovation, efficiency, and exports. Portugal's harvest area for pears held steady at 12,500 ha. Unfavorable weather conditions, combined with fungal disease incidence (*Stemphylium vesicarium*), is expected to result in a strong decline in Portuguese pear production in MY 2022/23. Unprecedented high temperatures during the summer reduced fruit size. The unique pear variety growing in Portugal is *Rocha*. Portuguese pear production continues to be higher than consumption, making Portugal a net exporter.

Chart 2: EU Pear Production for Selected Varieties in 1000 MT

F = forecast, Source: WAPA data

About half of all pears grown in the EU in MY 2022/23 were *Conference* pears, mainly grown in Belgium, the Netherlands, and Spain. Other popular varieties include *William Bon Crétien/Bartlett* (grown in Italy, Spain, and France) and *Abate Fetel* (grown in Italy) followed by *Rocha* (grown in Portugal), *Doyenne du Comice* (grown in the Netherlands and France) and *Coscia-Ercollini* (grown in Italy and Spain). There continues to be a growing interest in starting to produce club varieties such as *Xenia*, *QTee*, *Migo*, and *Sweet Sensation*, particularly among Dutch and Belgian growers, and production could double in the coming years. Club varieties have their patent, trademark, and marketing protected.

Pears – Non-Commercial Production

Non-commercially produced pears include pears grown in home gardens and meadows. If they are harvested, these pears are often consumed domestically (both fresh consumption and processing). Austria, the Czech Republic, Romania, and Slovenia have non-commercial production volumes which account for 50% or more of total pear production in their countries. This year's EU non-commercial volume is similar to last year's non-commercial production number. Austria and Romania alone were responsible for 62% of non-commercial production.

Pears – Consumption

EU pear consumption in MY 2022/23 could slightly increase due to this year's large domestic supply and outstanding taste. However, this might be tempered as consumers spend a larger share of their disposable income on energy, basic groceries, and housing, and have less money to spend on luxury

food items. Even though consumers recognize the nutritious value and health benefits of fresh fruit, they will have less disposable income available this marketing year to spend on fresh pears.

In general, the per-capita consumption of pears fluctuates somewhat from year-to-year depending on availability and price. The average per-capita consumption of pears in the EU is estimated between three and four kilograms per year with a per capita consumption that varies between member states. High per-capita consumption of pear numbers can be found in the Iberian Peninsula, Italy, the Netherlands, and Belgium, which at the same time are the largest pear producing countries in the EU. The lowest per-capita consumption markets in the EU, at two kilograms per year or less, include Hungary, Slovakia, Poland, and Lithuania.

At the member state level, the most popular pear varieties are often those that are grown regionally. Food retailers offer, on average, one or two different pear varieties. *Conference* pears have gained popularity in the German market (which used to be dominated by *Abate Fetel*) and are also conquering the Iberian Peninsula due to the lower availability of pears in Spain and Portugal this year. Taste, appearance, texture, and price are the main consumer considerations when buying pears. There is a trend, especially among consumers in Northwest Europe, towards preferring somewhat smaller-sized pears.

Pears - Processing

Most professional growers primarily 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 the fresh market. These pears are often used for baking, juice, and canning. Pears not suitable for human consumption (both fresh and further processing) normally are used for animal feed or fermentation. Prices for fresh pears on farm level also influence the volume used for processing. In MY 2022/23, processing volumes are estimated at just over 250,000 MT of which half are pears (mainly *Williams*) produced in Italy, where pears are bought by the local juice industry. Austria expects to process 30,000 MT, a slight drop compared to last year and a direct result of lower non-commercial pear production numbers. Most Austrian pears for processing are used to produce Perry (or pear cider), an alcoholic beverage made from fermented pears. Processing volumes in Spain are estimated at 25,000 MT and are also processed into fruit jelly and used by the canning industry.

Pears – Trade

EU External Trade

The impact of COVID-19 pandemic control measures on the EU's international pear trade was limited in MY 2021/22. No impact from these types of measures is expected in MY 2022/23.

To date Brexit has not impacted EU pear trade as Dutch and Belgian traders were well prepared to deal with the additional paperwork resulting from the UK leaving the EU. This might change when the UK

introduces phytosanitary certification obligations and physical checks. This was scheduled to start on July 1, 2022 but has been postponed to a later date.

Pears - Imports

Imported pears represent just over 7% of total EU pear supply, and traditionally end up in the EU's fresh market. The EU predominantly imports pears from Southern Hemisphere countries such as South Africa, Chile, and Argentina (see below table). According to TDM, imports from these countries normally begin in February (directly after the harvest in these countries), peak in April, and end in July. Imports for MY 2021/22 follow this pattern. Popular imported varieties include *Packham*, *Williams Bon Crétien*, *Forelle*, and *Abate Fetel*.

The Netherlands and Italy together accounted for over 70% of the EU's pear imports in MY 2021/22. Most of the volume entering the port of Rotterdam is shipped to other member states, particularly to Germany, Poland, France, and Belgium. Italy's imports predominantly stay in the Italian market. Other importing member states, albeit on a much smaller scale, are Germany, Romania, France, Portugal, and Spain.

EU imports were up by 7% in MY 2021/22 compared to MY 2020/21 due to a drop of EU commercial pear production that year. In MY 2022/23 EU pear imports are forecast to be slightly down due to the increased commercial production numbers. If the keeping quality is good, relatively more EU pears are expected to end up on the fresh consumer market within the EU this year.

Table 8: EU Import of Pears in MT

Country of Origin:	MY 2019/20	MY 2020/21	MY 2021/22	Change MY 2021/22 to MY 2020/21	Share of Total Imports in MY 2021/22
South Africa	56,282	60,319	75,302	25%	40%
Chile	40,304	44,512	41,764	-6%	22%
Argentina	49,218	42,171	37,715	-11%	20%
Turkey	9,726	13,321	16,926	27%	9%
China	11,583	8,523	8,752	3%	5%
Serbia	1,314	2,134	3,369	58%	2%
United Kingdom	1,129	1,437	843	-41%	0%
Uruguay	225	600	633	6%	0%
Australia	0	103	306	196%	0%
Bosnia & Herzegovina	1,017	1,250	264	-79%	0%
Other	918	261	429	64%	0%
Total	171,716	174,631	186,303	7%	

Sources: Trade Data Monitoring (TDM) accessed in September 2022

Turkey continues to slowly gain prominence on the import market and is the EU's fourth largest supplier of pears. Imports from Turkey tripled between MY 2018/19 and MY 2021/22. Romania and Bulgaria dominate pear imports from Turkey – pears are often re-exported.

China is the EU's fifth largest supplier of pears, and ships Asian pears, including the popular *Ya* variety, which is predominantly consumed by the Asian population in the EU. Annual imports from China on average total around 8,500 MT and are not expected to change much in MY 2022/23. Imports of pears from the United States have continued to decline and are currently non-existent due to the EU's strict Maximum Residue Level (MRL) for pesticides.

Pears - Exports

With some former export markets increasingly buying from the Southern Hemisphere, EU pear exports dropped from just over 420,000 MT in MY 2018/19 to 375,000 MT in MY 2020/21. Pear exports are largely comprised of pears produced in the EU. For MY 2021/22 exports dropped to just over 347,000 MT which was due to a drop of pear exports to Belarus during the months of February and March 2022. More information about the Belarusian embargo can be found in the Policy section.

In MY 2021/22, the UK was the EU's largest export market with exports of just over 100,000 MT for the last six marketing years. EU pear exports to the UK and other solid and mature consumer markets in Europe, such as Norway and Switzerland, are not expected to change much in MY 2022/23. This is particularly the case with the UK's postponement of its new phytosanitary certification requirements and phytosanitary checks at its border control posts.

Due to its temporary import ban, Belarus was only the second largest export market for EU pears, but other countries that have proximity to Russia, including Kazakhstan, are also important markets for Dutch and Belgian *Conference* pears. In MY 2021/22, exports to Belarus dropped by 34,956 MT while exports to Kazakhstan grew by 2,072 MT.

Pear exports to Brazil did not increase much in MY 2021/22 despite Portugal's good pear harvest. Portuguese pears, which are popular in Brazil, stayed on the EU market, due to a drop in commercial production in Italy. Due to the poor harvest forecast in Portugal for MY 2022/23, EU pear exports to Brazil are expected to slightly decrease in MY2022/23.

Over the past few years, EU pear exports to Hong Kong have decreased and trade to China has, in turn, increased. However, in MY 2021/22, exports to China fell by 21% which was a direct result of the COVID-19 pandemic. Exports to China are not expected to pick up in MY 2022/23 due to the higher prices of international trade and uncertainties concerning COVID-19.

Table 9: EU Export of Pears in MT

Country of Destination:	MY 2019/20	MY 2020/21	MY 2021/22	Change MY 2021/22 to MY 2020/21	Share of Total Imports in MY 2021/22
United Kingdom	102,216	105,528	101,383	-4%	29%
Belarus	120,099	112,621	77,665	-31%	22%
Morocco	38,816	33,320	47,278	42%	14%
Brazil	42,882	24,398	27,421	12%	8%
Kazakhstan	12,446	12,996	15,068	16%	4%
Norway	12,829	13,027	12,960	-1%	4%
Switzerland	5,961	6,897	9,059	31%	3%
Libya	4,748	3,436	6,480	89%	2%
Russia	2,849	1,339	6,355	375%	2%
China	6,641	6,581	5,205	-21%	2%
Ukraine	6,385	7,387	4,724	-36%	1%
Saudi Arabia	5,827	5,571	3,895	-30%	1%
Israel	5,650	3,627	2,749	-24%	1%
Serbia	3,181	2,787	2,518	-10%	1%
Bosnia & Herzegovina	8,105	6,708	2,435	-64%	1%
Albania	2,676	2,281	2,283	0%	1%
Canada	2,731	2,652	2,281	-14%	1%
UAE	3,293	3,004	2,044	-32%	1%
Azerbaijan	2,485	2,154	1,949	-10%	1%
Senegal	1,829	2,556	1,488	-42%	0%
Other	20,070	22,680	17,258	-24%	5%
Total	407,078	374,969	347,293	-7%	

Source: Trade Data Monitoring (TDM) accessed in September 2022

EU pear traders, more than before, will continue to look at ways to diversify risk given the existing Russian import ban, high prices of international shipping, Brexit, ongoing uncertainties due to the COVID-19 pandemic, and Russia's invasion of Ukraine. Supplying stable and nearby markets has gained importance among European traders while they continue to keep an eye open for new markets on other continents (especially in Southeast Asia and Latin America). However, it will take several years to develop a new, sustainable markets, particularly for varieties that are unknown to consumers in new markets.

Pears – Prices

Producer prices for pears are expected to be stable throughout the marketing year and slightly higher. This slight price increase will be driven by average EU pear production, the good taste of this year's pears, and the solid domestic demand for healthy, nutritious, unprocessed, and fresh products. Consumer prices could go somewhat up due to the general increase in production costs, including higher prices for raw materials, energy, and labor.

Pears – 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 10: Production, Supply, and Distribution – Tables Grapes

Grapes, Fresh Table Market Year Begins	2020/2021		2021/2022		2022/2023	
	Jun 2020		Jun 2021		Jun 2022	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	95,590	96,660	95,670	96,776		96,847
Area Harvested (HA)	91,049	92,053	90,667	91,692		91,799
Commercial Production (MT)	1,364,565	1,366,860	1,377,950	1,412,296		1,574,600
Non-Comm. Production (MT)	6,900	7,153	8,000	7,250		6,700
Production (MT)	1,371,465	1,374,013	1,385,950	1,419,546		1,581,300
Imports (MT)	570,300	570,386	560,000	597,447		510,000
Total Supply (MT)	1,941,765	1,944,399	1,945,950	2,016,993		2,091,300
Fresh Dom. Consumption (MT)	1,762,465	1,763,430	1,780,950	1,844,165		1,931,300
Exports (MT)	179,300	180,969	165,000	172,828		160,000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	1,941,765	1,944,399	1,945,950	2,016,993		2,091,300
(HA), (MT)						

Not official USDA data. Sources: Trade for MY 2020/21 and 2021/22: Trade Data Monitoring, LLC (TDM) accessed in September 2022; 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 approximately 92% of the EU's total production. In MY 2022/23 (June/May), commercial EU table grape production is forecast up from the previous season. This is mostly due to volume increases in Italy, thanks to ideal temperatures in May and June that favored fruit setting. Production increases are also forecast in Spain and France and stable production levels are projected for Portugal. Conversely, decreased volumes are forecast in Romania, Bulgaria, and Greece due to unfavorable weather. Overall, fruit quality is forecast to be excellent with higher sugar content due to hot temperatures in July, August, and early September. MY 2022/23 EU table grape area is forecast to continue its upward trend thanks to new seedless varieties entering into production in Italy (mainly in the Puglia region), Spain (in the region of Murcia), and Portugal (in the Ribatejo and Alentejo regions), driven by an increasing demand from intra-and-extra EU markets. However, rising input costs (namely energy, fertilizers, logistics) and a labor shortage caused by Russia's invasion of Ukraine remain as major concerns for EU table grape growers.

The COVID-19 pandemic had no impact on production volumes. However, production costs increased due to the imposition of COVID-19 related sanitary standards. These included minimal distancing rules, heightened standards for accommodation, transport, and new documentation requirements.

Table 11: EU Commercial Table Grape Production by Country and Year in MT

COUNTRY	MY 2020/21	MY 2021/22	MY 2022/23e	Change 2022:2021	Share of Total EU Production in 2022
Italy	670,000	720,000	864,000	20%	54.9 %
Spain	297,800	304,600	320,000	5%	20.3 %
Greece	273,063	271,997	270,000	-0.7%	17.1%
France	50,000	38,000	45,000	18.4%	2.9%
Romania	46,000	45,700	44,000	-3.7%	2.8%
Portugal	17,907	19,685	19,500	-0.9%	1.2%
Bulgaria	12,090	12,314	12,100	-1.7%	0.8%
Total	1,366,860	1,412,296	1,574,600	11.5 %	100%

e= estimated; due to rounding percentages add up to marginally less than 100%.

Source: FAS EU posts

Table Grapes – Non-Commercial Production

Non-commercial EU table grape production includes table grapes grown in home gardens, meadows, or field edges. MY 2022/23 non-commercial EU table grape production is forecast to decrease by approximately 7.6% compared to the previous season due to lower volumes in Bulgaria (down 10%) and Romania (down 7.2%) due to dry weather conditions.

Table Grapes – Consumption

In MY 2022/23, EU fresh grape consumption is forecast up from the previous season, driven by Italy's increased production and a recovering HRI demand as the COVID-19 pandemic slows down. Moreover, fresh grapes are increasingly perceived as an attractive and tasty healthy snack. Starting in June and throughout the end of the calendar year, EU fresh grape consumption is mostly supplied by domestic production. Imports from third countries represent approximately 32% of total consumption. These imports normally come in the first half of the calendar year from the Southern hemisphere

Germany, Italy, Greece, Spain, and France remain the leading table grape consumers in the EU, followed by Romania, Portugal, Czech Republic, Austria, Bulgaria, Croatia, Slovakia, and Slovenia. While Italian seeded grapes are still widely consumed, EU consumers are increasingly demanding seedless varieties (*Sugraone, Crimson, Thompson, Regal, Summer Royal, Centennial, Sublime*, etc.).

Table Grapes – Trade

Table Grapes - Imports

Unlike with apples and pears, the EU is a net importer of fresh table grapes. MY 2022/23 EU table grape imports are forecast down due to increased domestic production. During MY 2021/22, EU table grape imports increased by approximately 4.7% from the previous season, driven by a recovering HRI demand as the COVID-19 pandemic slowed down. The largest EU importing countries remain the Netherlands and Germany. These are followed by France, Poland, Spain, Romania, Belgium, Czech Republic, Austria, Portugal, Sweden, Denmark, Slovenia, Slovakia, Ireland, Italy, Hungary, Finland, Latvia, Lithuania, Croatia, Bulgaria, Estonia, Cyprus, Luxemburg, Malta, and Greece. The Netherlands serves mainly as a trans-shipping point.

Table 12: EU Imports of Table Grapes in MT

Country of Origin	MY 2019/20	MY 2020/21	MY 2021/22	Change MY2021/22 to MY2020/21	Share of Total Imports in MY 2021/22
South Africa	143,609	177,855	182,734	3%	31%
Peru	76,360	99,219	97,513	-2%	16%
India	73,160	84,162	87,622	4%	15%
Chile	59,512	48,656	63,386	30%	11%
Egypt	47,789	47,805	42,662	-11%	7%
Brazil	21,050	25,869	33,901	31%	6%
Turkey	27,231	30,053	32,743	9%	5%
Namibia	16,377	23,076	21,700	-6%	4%
Moldova	19,217	16,098	19,753	23%	3%
Morocco	4,464	4,914	5,691	16%	1%
United States	169	107	0	-100%	0
Other	11,721	12,572	9,742	-22%	2%
Total	500,659	570,386	597,447	4.7%	100%

Source: Trade Data Monitor, LLC (TDM) accessed in September 2022

Due to rounding percentages add up to marginally more than 100%.

Table Grapes - Exports

MY 2022/23 EU table grape exports are forecast down due to soaring freight, logistical, and transportation costs triggered by Russia's invasion of Ukraine. During MY 2021/22, EU table grape exports decreased by 4.5% from the previous season as a result of high transportation costs and discouraging bureaucratic delays. Seedless varieties (*Sugar Crisp*, *Sweet Sunshine*, *Sweet Celebration*, *Sweet Sapphire*, *Jack's Salute*, and *Cotton Candy*) are mainly sent to the UK and the UAE.

Table 13: EU Exports of Table Grapes in MT

Country of Destination	MY 2019/20	MY 2020/21	MY 2021/22	Change MY2021/22 to MY2020/21	Share of Total Exports in MY 2021/22
United Kingdom	98,509	101,596	92,413	-9%	53%
Switzerland	24,730	27,772	27,374	-1%	16%
Norway	16,256	17,121	16,712	-2%	10%
Russia	1,806	2,590	4,823	86%	3%
South Africa	3,059	2,600	3,671	41%	2%
Saudi Arabia	2,076	2,232	3,267	46%	2%
Bosnia & Herzegovina	2,932	2,825	2,926	4%	2%
Ukraine	2,550	2,865	2,206	-23%	1%
Albania	3,195	2,513	1,798	-28%	1%
Belarus	2,005	1,927	1,330	-31%	1%
United States	1,004	1,363	724	-47%	0%
Other	18,461	15,565	15,584	0%	9%
Total	176,583	180,969	172,828	-4,5	100%

Data source: Trade Data Monitor, LLC (TDM) accessed in September 2022; due to rounding percentages add up to marginally more than 100%.

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

In 2021, EU policymakers were faced with many challenges: the COVID-19 pandemic, the Common Agricultural Policy (CAP) reform, the implementation of the Farm to Fork Strategy (F2F), and the first full year without the UK in the EU. Resiliency of the food system has been front and center in policy debates in Brussels for the past two years and these concerns were raised to a higher level following the Russian invasion of Ukraine in February 2022. Other issues concerning changes in pesticide regulations and agricultural bans may have influenced global fruit trade as well.

EU Policy Response to the War in Ukraine

In February 2022, Russia invaded Ukraine and the ensuing war is continuing to threaten global food security and creating a food supply chain crisis. On March 23, 2022, the European Commission published a Communication [‘Safeguarding food security and reinforcing the resilience of food systems,’](#) which outlines short-term and medium-term actions that the EU will take to enhance global food security and support EU farmers given rising commodity prices and costs for energy and fertilizer inputs due to the war in Ukraine. The EU will distribute €500 million euros in national allocations to directly support EU farmers most affected by higher input costs and the closure of export markets. Member states can supplement this support up to 200% using national funds. Additionally, the Commission has granted an exceptional and temporary derogation from certain greening obligations. Member states may allow production of any food and feed crop on fallow lands that are part of Ecological Focus Areas (EFA) for the duration of 2022, while still providing the full level of greening payment that would be given if the land was kept fallow. This temporary flexibility aims to allow EU farmers to adjust and expand their cropping plans in response to the new market dynamics. Despite the measures, the European fresh produce sector remains concerned about market stability since the focus is on crops and fertilizer availability.

The Common Agriculture Policy (CAP)

[Regulation \(EU\) No 1308/2013](#) outlines a framework for market measures under the CAP by the single Common Market Organization (CMO) and it entered into force on January 1, 2014.

The key elements in the EU's CMO for fruit and vegetables are the Producer Organizations (POs), which are legal entities established by producers to draw up work programs for the purpose of improving the production and marketing of certain products, including fresh deciduous fruit. These POs are eligible to receive EU subsidies instead of individual producers. To qualify for EU subsidies, a PO must submit an operational program financed through an operational fund and directly receives the EU's financial contribution. The basis for the calculation of the estimated amount of the operational fund is the operational program and the value of the marketed production. The approval of operational programs happens under Regulation (EU) No 1308/2013.

On June 1, 2017, [Commission Delegated Regulation 2017/891](#) entered into force with supplementing measures for fruit and vegetable POs. This framework seeks to make POs more attractive to non-members, provide greater clarity about what actions are eligible for EU funding and set a maximum

percentage of produce that can be marketed outside the organization at 25% to create short supply chains whereby producers sell directly to consumers. It simplifies and clarifies legislation regarding payments to transnational POs and their associations. It also increases the limit for withdrawals from the market. These market measures under the CAP aim to create a more competitive and market-oriented sector.

In 2021, European institutions adopted the CAP 2020 reform consisting of four [basic regulations](#) supplemented by delegated acts, and amending the implementing rules for the fresh and processed fruit and vegetables sectors ([Commission implementing Regulation \(EU\) No 543/2011](#)). This reform will enter into force on January 1, 2023. The Commission is currently developing implementing and delegated acts ahead of the entry into force and the member states are developing their National Action Plans.

The Farm to Fork Strategy

The F2F Strategy highlights 27 actions aimed at transforming the way EU food is produced, processed, transported, presented, and sold. The full strategy is available [here](#). The F2F Strategy seeks to position the EU's food systems on a more sustainable path. At the production level, the Commission proposes actions to reduce the overall use and risk of chemical pesticides by 50% by 2030 as well as the reduction of the use of fertilizers by at least 20%, among other cuts. Additionally, the Commission is aiming for 25% of agricultural lands to be used for organic farming, up from the current 8%. See [GAIN report: Pesticides Initiatives in the EU Farm to Fork Strategy](#) for more information. The reduction of pesticide use could affect the availability of active substances for fresh deciduous fruit producers in the EU and associated maximum residue levels (MRLs). This, in turn, could incur potential trade implications with regards to imports of fresh deciduous fruit into the EU.

Biodiversity Strategy

The Biodiversity Strategy provides a broad focus on nature conservation and tackling biodiversity loss in the EU and globally. The two main pesticide reduction initiatives presented in F2F are emphasized in the Biodiversity Strategy and complemented by the Biodiversity Strategy's pledge to review and possibly revise the EU 2018 Pollinators Initiative. This Strategy also aims for further soil and nature conservation by setting aside a minimum of 10% of the existing agricultural area into higher biodiversity landscape features, such as buffer strips and rotational and non-rotational fallow land. The Commission's proposed conservation measure is nested within the over-arching target of the Biodiversity Strategy to protect 30% of all EU land. See [GAIN report: Green Deal Strategies for the EU Agri-Food Sector Present a Politically Ambitious Policy Roadmap](#).

Marketing Standards

Fresh fruit and vegetable imports into the EU must also comply with EU-harmonized marketing standards. These standards apply at all marketing stages and include criteria such as quality, size, labeling, packaging, and presentation. [Commission implementing Regulation \(EU\) No 543/2011](#) provides for a general marketing standard for all fresh fruits and vegetables. Specific marketing standards are still in place for ten products, including apples and pears, and are set out in Part B of

Annex I to this Regulation: for apples in Part 1 of that same section on page 95 and for pears in Part 6 on page 129.

Certification of Fruit Shipments

Fruit and vegetables exported to the EU require a phytosanitary certificate. A USDA/Animal Plant Health Inspection Service inspector issues these certificates. This standard-setting body coordinates cooperation between nations to control plant and plant product 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 [Regulation \(EU\) 2019/2072](#).

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 when justified, as published in the latest updated list of products that is available at the following link: https://ec.europa.eu/food/plants/plant-health-and-biosecurity/trade-plants-plant-products-non-eu-countries/reduced-frequency_en.

Maximum Residue Levels for Fruit

Maximum Residue Levels (MRLs) for pesticides, including import tolerances, have been harmonized throughout the EU and can be found in the [EU MRL database](#). The following tables provide interested stakeholders with advance notice of active ingredients under review for renewal of approval in the EU and are listed with a U.S. MRL for fresh deciduous fruit in the [global MRL database](#). For additional information, please consult the FAS/Brussels' website on [EU Early Alerts](#).

Upcoming reviews for MRLs:

Article 12 review

<https://www.efsa.europa.eu/sites/default/files/pesticides-MRL-review-progress-report.pdf>

Table 14: Upcoming reviews for active substances:

Active substance	Expiration date	Last day of application for renewal of the active substance
Flucapyroxad	05/31/2025	05/31/2022
Bixafen	05/31/2025	05/31/2022
Pyriofenone	01/31/2025	01/31/2025
Disodium phosphonate	01/31/2026	01/31/2023
Penflufen	05/31/2025	05/31/2022
Sedaxane	05/31/2025	05/31/2022
Benalaxyl-	04/30/2025	04/30/2022
Pyroxsulam	04/30/2025	04/30/2022
Penthiopyrad	05/31/2025	05/31/2022

1,4-Dimethylnaphthalene	06/30/2025	06/30/2022
Pyridalyl	06/30/2025	06/30/2022

Glyphosate

The active substance *glyphosate* is approved for use at the EU level and is set to expire on December 15, 2022. Its renewal procedure is currently ongoing, and its last reauthorization was limited to [five years](#) instead of the more typical 10 to 15 years. EU MRLs for *glyphosate* remain in place and impact on trade has been limited as there are no restrictions on imported products that are treated with products containing *glyphosate*.

Tariffs

Entry Price System

EU imports of fresh fruit and vegetables are subject to the Entry Price System, which has been in place in its current form since the Uruguay Round. It is a complex tariff system, which 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 an ad valorem duty only. Tariff levels for 2022 and 2023 are published in [Commission Implementing Regulation 2021/1832](#) and [Commission Implementing Regulation 2022/1998](#), respectively. The tariffs can be found on the following pages:

Apples see pages 105 and 750-752

Pears see pages 105 and 752-754

Concentrated Apple Juice see pages 176-177

Grapes see pages 105 and 750 (certificate 1074)

First Come, First Served Principle

Regarding the administration of import tariff quotas, certain types of fresh deciduous fruit are subject to the [‘first come, first served’ principle](#):

Table 15: Tariff Rate Quotas

Product	Tariff codes	Quantity (kg)	Period	Origin	In-Quota Duty
Apples, fresh	0808 10 80	666,000	April 1 – July 31	All third countries	4%
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	31%
Preserved fruit including preserved pears	2008 40 11 2008 40 19 2008 40 21 2008 40 29 2008 40 31 2008 40 39	2,820,000	January 1 – December 31	All third countries	20 %

Tariff Rate Quota's Under Free Trade Agreements

On June 28, 2019, the European Union became the first major partner to strike a trade agreement with the Southern Common Market (or MERCOSUR) countries of Argentina, Brazil, Paraguay, and Uruguay. Subject to ratification by the EU Parliament and Commission, the agreement will eliminate 93% of tariffs for MERCOSUR exports to the EU, while offering preferential treatment for the remaining 7%. Although a final tariff schedule has not yet been publicly released, a [preliminary analysis](#) indicates that U.S. agricultural products that compete with MERCOSUR and EU products will be at a significant disadvantage.

Other Free Trade Agreement affecting fresh deciduous fruit exports to the EU

The EU is negotiating and has implemented several Free Trade Agreements (FTAs) with other countries and regions such as the major EU fresh deciduous fruit partners: 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: <https://ec.europa.eu/trade/policy/countries-and-regions/negotiations-and-agreements/>

European School Fruit, Vegetables and Milk Scheme

The European “School Fruit Scheme” originated in 2009 as a measure to combat childhood obesity. It includes three elements: free distribution of fruit and vegetables in schools, informational campaigns on healthy eating habits, and monitoring and evaluation. In March 2022, it allocated \$271 million (€223 million) of EU funds for the school year 2022/2023 to all the member states according to [Commission Implementing Decision \(EU\) 2022/493](#), which entered into force on August 1, 2022. Following the publication of [Commission Implementing Regulation \(EU\) 2022/861](#) on June 1, 2022, about €2.9 million is allocated towards catering to the needs of displaced Ukrainian children in EU schools.

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. The Commission reformed its promotion policy with an extension of the product scope and a greater focus on export markets. For 2021, the European Commission allocated a total of 182.9 million¹¹ euros for the promotion of the European Union’s agri-food products both in Europe and worldwide. The focus is on promoting products and farming methods that more directly support the European Green Deal objectives, prioritizing organic products, fruit and vegetables, and sustainable agriculture. As part of the F2F Strategy, the European Commission announced in April 2021, that it would review the European Union’s policy on the promotion of agricultural products both inside and outside the EU. This review fits in the Commission’s Green Deal efforts to promote more sustainable production and consumption of food. For more information about the EU’s promotion program please see GAIN Reports [EU 2021 Promotion Programs for Agricultural Products](#) and [Review of the EU Policy on the Promotion of Agricultural Products](#).

Bans Impacting Fresh Deciduous Fruit Trade

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, including apples, pears, and grapes, 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 since continued to extend the ban every year. The Commission introduced specific market support measures for the European fruit and vegetable sector since the start of the ban in 2014 through 2017. The last emergency measures for fruit and vegetables were phased out on June 30, 2018. Overall, the EU granted \$585 million (€500 million) of aid to EU producers of fruit and vegetables corresponding to 1.7 million tons of withdrawals from the market.

Belarussian Import Ban

Belarus banned the import of certain fruit and vegetables, including apples and pears from some EU countries, during the period of January 1, 2022 to April 26, 2022. This is reflected in the lower EU export numbers for apples and pears in MY 2021/22.

Brexit

The United Kingdom withdrew from the European Union on February 1, 2020. The Agreement on the withdrawal of the UK from the EU entered into force on the same date. This Agreement provided for a transition period, which ended on December 31, 2020. During the transition period, EU law was applicable to and in the UK. On December 24, 2020, the EU and UK negotiators reached a Trade and Cooperation Agreement (TCA) that sets out the rules of the new partnership. It entered in to force on January 1, 2021. For more information: https://ec.europa.eu/info/relations-united-kingdom/new-normal/consequences-brexit_en

On January 1, 2021, the provisions of the TCA immediately led to some border disruptions, delays, and stuck shipments, especially on the UK side as EU ports and customs immediately enforced the new customs document requirements according to EU guidelines, while the UK implemented a phased grace period through July 1, 2021, which was subsequently extended until July 1, 2022. Some of these problems reflect the speed with which traders had to familiarize themselves with the new arrangements, while others are more structural in nature and will mean long term change, such as the amount of paperwork required for groupage shipping or the availability of export health certification for certain products.

The European Commission published a notice to stakeholders on the withdrawal of the United Kingdom and EU food law, as well as for [import licenses](#) on the EU Tariff Rate Quotas (TRQ).

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. At the time of writing these trade shows are scheduled to happen as in person events. However, depending on the further development of the COVID-19 pandemic, they may be converted and held fully or partially online instead.

<p>FRUIT LOGISTICA Berlin, Germany (Interval: yearly)</p> <p>Target Market: Germany/EU/Central & Eastern Europe</p> <p>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</p>	<p>Next Fair:</p> <p>February 8-10, 2023</p>
<p>BIOFACH Nuremberg, Germany (Interval: yearly)</p> <p>Target Market: Germany/Europe</p> <p>The leading European trade show for organic food and non-food products http://www.biofach.de/en</p>	<p>Next Fair:</p> <p>February 14-17, 2023</p>

Section VI: Related Reports

For related reports please search the USDA/FAS GAIN database: <https://gain.fas.usda.gov/#/search>

<p>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</p>
<p>Product Brief Fresh Fruit GM2022-0024Berlin Germany Published On: August 24, 2022 Product Brief Fresh Fruit Berlin Germany GM2022-0024</p>
<p>The Organic Market in the Netherlands NL2021-0029The Hague Netherlands Published On: December 07, 2021 The Organic Market in the Netherlands The Hague Netherlands 12-06-2021</p>
<p>Fresh Deciduous Fruit Annual BU2021-0042Sofia Bulgaria Published On: December 07, 2021 Fresh Deciduous Fruit Annual Sofia Bulgaria 12-02-2021</p>
<p>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</p>
<p>French legislation threatens millions of dollars of US fruit and vegetable exports Gain Report FR2021-004</p>
<p>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</p>
<p>Direct Versus Indirect Trade -- Poland's Hidden Market for US Ag Exports PL2021-0013Warsaw Poland, Published On: April 28, 2021 Direct Versus Indirect Trade -- Poland's Hidden Market for US Ag Exports Warsaw Poland 04-25-2021</p>
<p>Direct Versus Indirect Trade Romania -- Romania's Hidden Market for US Ag Exports RO2021-0006Bucharest Romania, Published On: April 28, 2021 Direct Versus Indirect Trade Romania -- Romania's Hidden Market for US Ag Exports Bucharest Romania 04-23-2021</p>
<p>Opportunities for Organic Exports to Germany GM2021-0002Berlin Germany Published On: January 21, 2021 Opportunities for Organic Exports to Germany Berlin Germany 01-08-2021</p>

Attachments:

No Attachments