

Philippe Binard

WAPA

2026/2027 apple forecast



Prognosfruit Forecast and Outlook: the concept

Half a century tradition



- Sector responsibility – teamwork
- Alignment and cooperation with EU Market Observatory and Dashboard
- In line with antitrust law providing transparency and building market intelligence in line with Eurostat and national statistics - centralizing existing business data from technician in the field
- Reliability, trust and accountability of the data based on a professional network
- Networking and communication for the launch of the campaign



Holistic and global approach

- Global approach for NH and SH
- Regular update to cope with harvest, uncertain climatic conditions, market conditions
- High reliability of the forecast – a posteriori validation and accountability of the process



Market oriented - total production contrasted:

- Fresh v processed
- Segmentation trends
- Quality scheme trends (organic, varietal/club trends)
- Analysis go beyond the figures (quantitative and qualitative) in cooperation with AMI
- Stocks depletion are provided during the season – more monitoring on import/export underway
- Prognosfruit allow to best plan supply and set marketing strategies based on a multiplicity of factors
- Market never lies

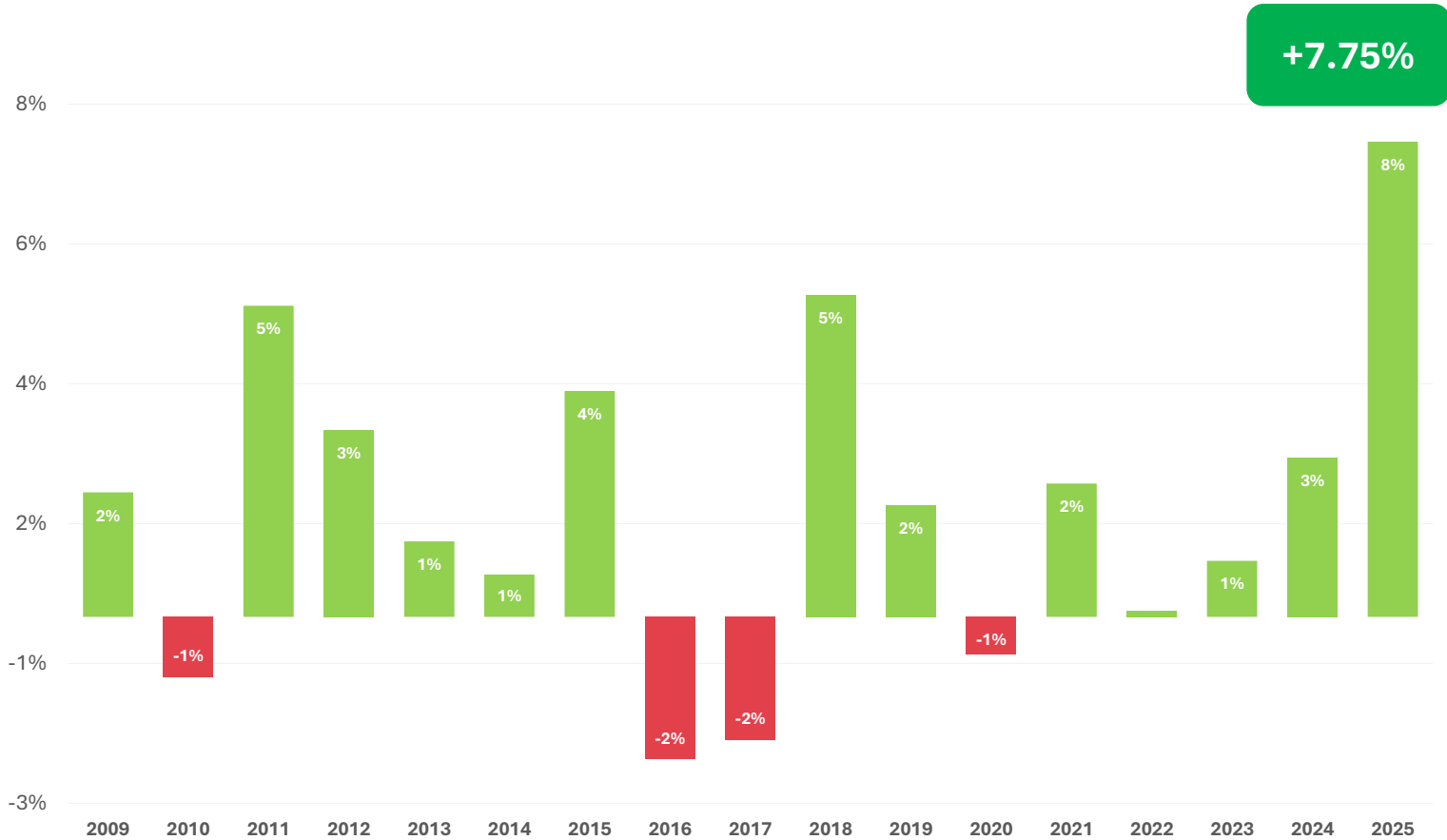
Balance season 2025/2026

Validation of the 2025/2026 forecast EU



In 1,000 t	Forecast	Final	VAR %	VAR (t)
2009	10,792	11,008	↑ 2.00%	216
2010	9,835	9,740	↓ -0.97%	-95
2011	10,234	10,746	↑ 5.00%	512
2012	9,800	10,095	↑ 3.01%	295
2013	10,798	10,929	↑ 1.21%	131
2014	11,893	11,974	↑ 0.68%	81
2015	11,893	12,325	↑ 3.63%	432
2016	12,006	11,731	↓ -2.29%	-275
2017	9,343	9,158	↓ -1.98%	-185
2018	12,611	13,264	↑ 5.18%	653
2019	10,556	10,746	↑ 1.80%	190
2020	10,711	10,646	↓ -0.60%	-65
2021	11,737	11,989	↑ 2.15%	252
2022	11,924	11,936	↑ 0.10%	12
2023	11,411	11,514	↑ 0.90%	103
2024	10,207	10,469	↑ 2.56%	262
2025	10,455	11,254	↑ 7.64%	799

Source: Prognosfruit





Prognosfruit forecast – EUROSTAT comparison

	In 1,000 t	Aug 2025	2025 final	VAR %	VAR (t)
	Austria	142	138	↓ -2.82%	-4
	Belgium	183	222	↑ 21.20%	39
	Croatia	48	48	→ 0.00%	0
	Czechia	107	117	↑ 8.99%	10
	Denmark	24	24	→ 0.00%	0
	France	1,484	1,533	↑ 3.30%	49
	Germany	1,000	1,138	↑ 13.78%	138
	Greece	178	190	↑ 6.66%	12
	Hungary	160	170	↑ 6.25%	10
	Italy	2,248	2,319	↑ 3.17%	71
	Latvia	6	6	→ 0.00%	0
	Lithuania	4	4	↑ 14.29%	1
	Netherlands	226	236	↑ 4.42%	10
	Poland	3,300	3,800	↑ 15.15%	500
	Portugal	303	280	↓ -7.59%	-23
	Romania	442	442	→ 0.00%	0
	Slovakia	32	32	→ 0.00%	0
	Slovenia	35	35	→ 0.00%	0
	Spain	501	488	↓ -2.49%	-12
	Sweden	32	32	→ 0.00%	0
	Total	10,455	11,254	↑ 7.64%	799

	In 1,000 t	2025 final	EUROSTAT	VAR %	VAR (t)	Notes
	Austria	138	251	↑ 82.05%	113	Prognosfruit: Stiermark only
	Belgium	222	222	↑ 0.00%	0	
	Croatia	48	60	↑ 24.74%	12	
	Czechia	117	123	↑ 5.16%	6	
	Denmark	24	22	↓ -10.38%	-2	
	France	1,533	1,973	↑ 28.71%	440	Prognosfruit: ANPP only
	Germany	1,138	1,138	↑ 0.00%	0	
	Greece	190	299	↑ 57.95%	110	
	Hungary	170	209	↑ 22.83%	39	
	Italy	2,319	2,413	↑ 4.04%	94	Prognosfruit: Assomela only
	Latvia	6	6	↓ -6.67%	0	
	Lithuania	4	14	↑ 248.50%	10	
	Netherlands	236	236	→ 0.00%	0	
	Poland	3,800	3,822	↑ 0.57%	22	
	Portugal	280	282	↑ 0.75%	2	
	Romania	442	447	↑ 1.24%	5	
	Slovakia	32	34	↑ 6.20%	2	
	Slovenia	35	36	↑ 3.48%	1	
	Spain	488	563	↑ 15.23%	74	
	Sweden	32	33	↑ 3.45%	1	
	Total	11,254	12,183	↑ 8.25%	929	

Not included in Prognosfruit	
EU Member State	10.000 t
Bulgaria	20.48
Estonia	1.55
Ireland	22.40
Cyprus	2.97
Luxembourg	2.10
Malta	0.00
Finland	7.12
Total	56.62



Source: Prognosfruit/Eurostat

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Validation of the 2025/2026 forecast EU



In 1,000 t	Aug 2025	2025 final	VAR %	VAR (t)
Braeburn	173	182	↑ 5.05%	9
Cripps Pink	334	369	↑ 10.46%	35
Elstar	330	371	↑ 12.68%	42
Fuji	283	280	↓ -0.98%	-3
Gala	1,429	1,496	↑ 4.69%	67
Gloster	121	131	↑ 8.07%	10
Golden	2,059	2,035	↓ -1.12%	-23
Granny	347	360	↑ 3.61%	13
Idared	465	517	↑ 11.31%	53
Jonagold	292	335	↑ 14.90%	43
Jonagored	148	194	↑ 30.60%	45
Ligol	190	200	↑ 5.26%	10
Pinova	211	222	↑ 4.95%	10
Red Delicious	487	524	↑ 7.75%	38
Red Jonaprince	390	488	↑ 25.20%	98
Shampion	379	381	↑ 0.47%	2

Underpredicted	
Jonagored	↑ 30.60%
Red Jonaprince	↑ 25.20%
Jonagold	↑ 14.90%
Elstar	↑ 12.68%
Idared	↑ 11.31%

Overestimated	
Golden	↓ -1.12%
Fuji	↓ -0.98%

Largest variation in volume: Red Jonaprince (+98 t)

Largest variation in percentage: Jonagored (+30.60%)



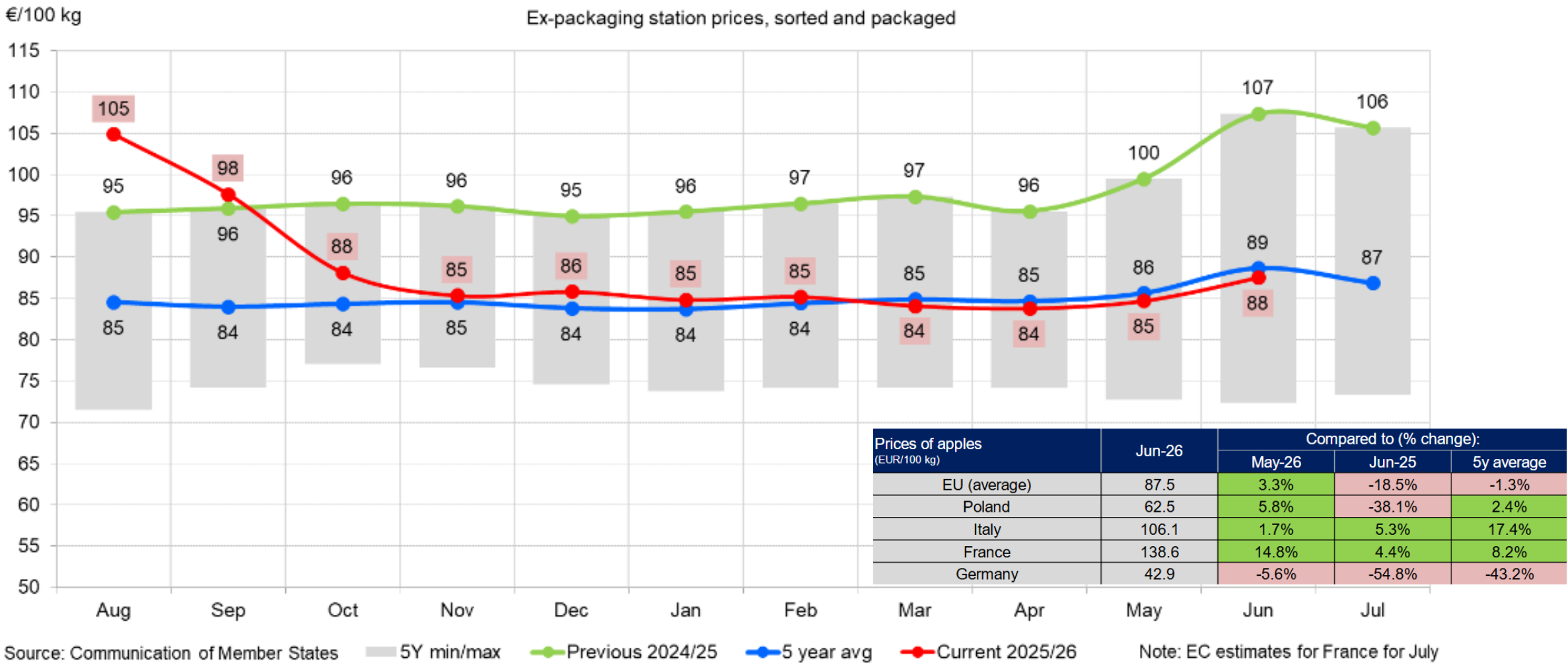
Source: Prognosfruit





Prices trends (ex packing) 2025/2026 season

Evolution of EU calculated apple prices
Based on simple avg of 4 major producing Member States (PL, DE, FR, IT)



Source: DG AGRI Pipfruit dashboard

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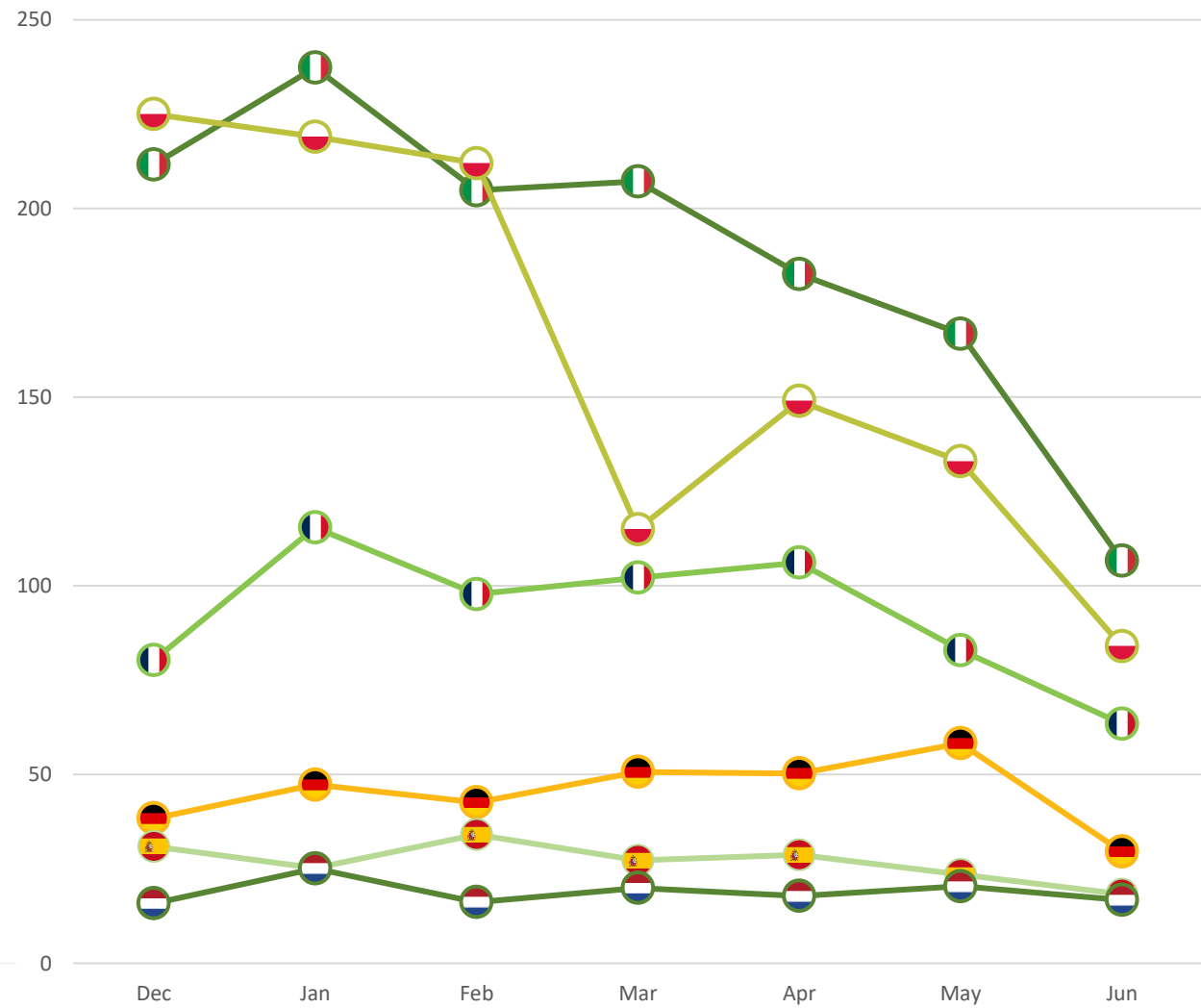
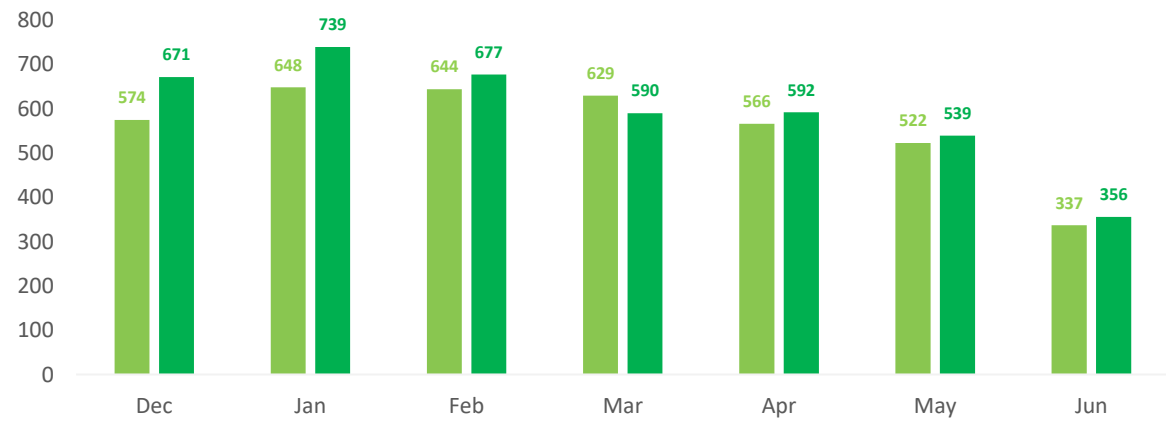


Sales of the 2025/2026 season



	Dec 2025 sales (t)	Jan 2026 sales (t)	Feb 2026 sales (t)	Mar 2026 sales (t)	Apr 2026 sales (t)	May 2026 sales (t)	Jun 2026 sales (t)
Austria (Steiermark)	9,240	10,732	10,167	15,672	14,361	13,187	11,452
Belgium	21,743	21,808	24,402	14,273	11,787	11,205	6,450
Czechia	10,754	7,939	8,367	6,318	5,962	4,503	2,491
Denmark	2,459	2,724	2,025	1,578	901	553	
France	80,303	115,474	97,809	102,185	106,147	82,976	63,433
Germany	38,384	47,309	42,635	50,682	50,295	58,284	29,557
Italy	211,677	237,333	204,800	207,180	182,637	166,800	106,710
Poland	225,000	219,000	212,000	115,000	149,000	133,000	84,000
Spain (Catalonia)	30,937	25,268	34,087	27,292	28,744	23,534	18,292
Switzerland	7,589	8,242	7,830	9,648	8,620	8,395	6,346
Netherlands	15,853	25,098	16,184	19,960	17,814	20,415	16,768
UK	17,312	18,173	16,641	20,050	15,561	15,858	10,208
Total	671,252	739,100	676,946	589,839	591,829	538,709	355,707

■ 2024-2025 ■ 2025-2026



Source: WAPA

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Stocks depletion of the 2025/2026 season



Country	Dec 2025 stocks (t)	Jan 2026 stocks (t)	Feb 2026 stocks (t)	Mar 2026 stocks (t)	Apr 2026 stocks (t)	May 2026 stocks (t)	Jun 2026 stocks (t)	Jul 2026 stocks (t)
Austria (Steiermark)	111,459	102,219	91,486	81,319	65,647	51,286	38,099	26,647
Belgium	129,302	107,558	85,750	61,348	47,075	35,288	24,083	17,634
Czechia	50,435	39,681	31,742	23,375	17,057	11,095	6,592	4,101
Denmark	10,240	7,781	5,057	3,032	1,454	553		
France	733,008	652,705	537,231	439,423	337,238	231,091	148,115	84,682
Germany	395,764	357,380	310,071	267,436	216,754	166,459	108,175	78,618
Italy	1,527,078	1,315,401	1,078,068	873,268	666,088	483,451	316,651	209,941
Poland	1,280,000	1,055,000	836,000	624,000	509,000	360,000	227,000	143,000
Spain (Catalonia)	224,421	193,484	168,216	134,129	106,837	78,093	54,559	36,267
Switzerland	70,277	62,688	54,446	46,616	36,968	28,348	19,953	13,607
Netherlands	165,699	149,846	124,748	108,564	88,604	70,790	50,375	33,607
UK	132,436	115,124	96,951	80,310	60,260	44,699	28,841	18,633
Total	4,830,119	4,158,867	3,419,767	2,742,821	2,152,982	1,561,153	1,022,444	666,737



Source: WAPA



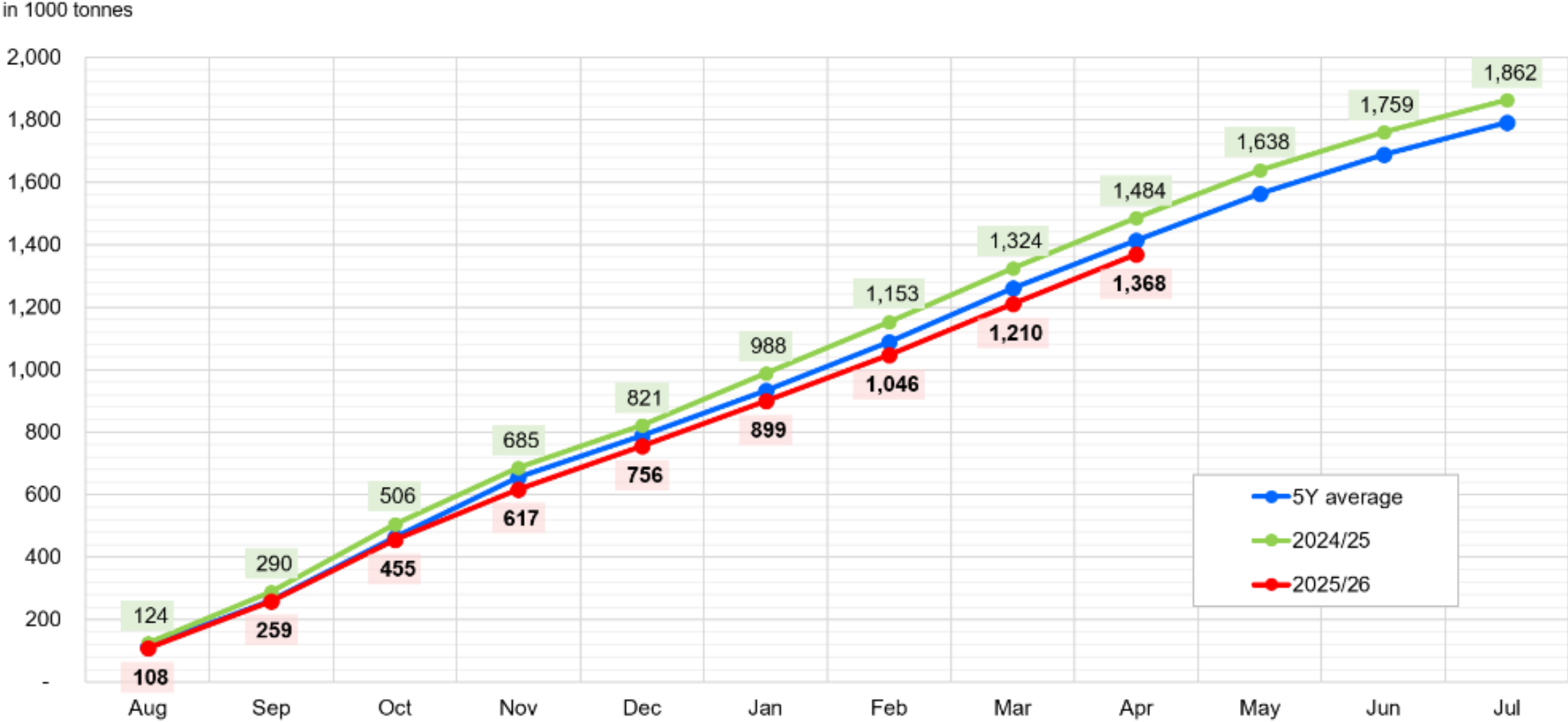
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Intra-EU trade 2025/2026

Intra-EU trade of apples (cumulated)
CN 080810



Source: DG AGRI Pipfruit dashboard/Eurostat



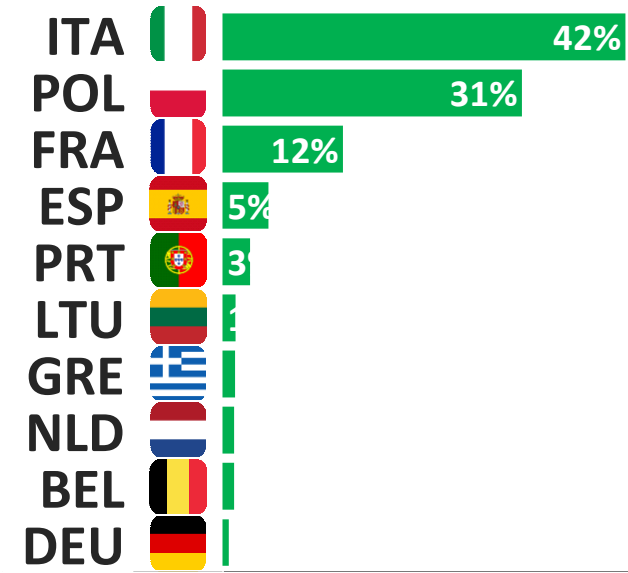
EU apples exports by origin



Week 50	2024/2025			2025/2026			YOY%		
	Euro Value	kg	Av. Value	Euro Value	kg	Av. Value	Euro Value	kg	Unit Value
Total	956,547,224	941,805,324	1.02	1,084,029,984	1,121,133,661	0.97	+13.33%	+19.04%	-4.80%
Italy	407,605,013	375,813,740	1.08	506,183,752	466,783,150	1.08	+24.18%	+24.21%	-0.02%
Poland	176,668,809	247,672,117	0.71	221,947,777	346,708,678	0.64	+25.63%	+39.99%	-10.26%
France	209,981,679	142,175,385	1.48	196,842,643	139,609,670	1.41	-6.26%	-1.80%	-4.53%
Spain	57,306,734	51,825,178	1.11	58,088,075	53,028,941	1.10	+1.36%	+2.32%	-0.94%
Portugal	39,327,057	35,968,175	1.09	31,075,432	31,685,178	0.98	-20.98%	-11.91%	-10.30%
Lithuania	4,151,040	5,528,990	0.75	11,361,254	14,876,644	0.76	+173.70%	+169.07%	+1.72%
Greece	28,423,704	48,180,251	0.59	8,222,735	14,399,275	0.57	-71.07%	-70.11%	-3.20%
Netherlands	12,740,557	8,833,683	1.44	17,066,514	13,425,390	1.27	+33.95%	+51.98%	-11.86%
Belgium	6,952,107	8,755,633	0.79	12,689,348	13,177,190	0.96	+82.53%	+50.50%	+21.28%
Germany	910,096	592,096	1.54	5,578,113	7,047,691	0.79	+512.91%	+1090.30%	-48.51%
Croatia	4,165,625	6,674,022	0.62	2,696,649	5,765,412	0.47	-35.26%	-13.61%	-25.06%
Austria	1,882,437	1,631,240	1.15	5,934,117	5,542,507	1.07	+215.24%	+239.77%	-7.22%
Slovenia	2,667,278	3,638,379	0.73	2,911,245	4,687,491	0.62	+9.15%	+28.83%	-15.28%
Hungary	801,191	2,617,009	0.31	1,385,284	3,193,075	0.43	+72.90%	+22.01%	+41.71%
Denmark	2,350,544	1,454,206	1.62	1,825,915	1,102,449	1.66	-22.32%	-24.19%	+2.47%
Romania	140,722	174,207	0.81	23,933	33,653	0.71	-82.99%	-80.68%	-11.96%
Sweden	156,144	99,462	1.57	103,079	32,616	3.16	-33.98%	-67.21%	+101.31%
Ireland	289,685	139,188	2.08	77,952	25,102	3.11	-73.09%	-81.97%	+49.21%
Bulgaria	9,920	7,550	1.31	13,231	7,946	1.67	+33.38%	+5.25%	+26.73%
Estonia	4,852	2,728	1.78	2,779	1,569	1.77	-42.71%	-42.49%	-0.39%
Malta				156	35	4.49			
Czechia	10,152	19,200	0.53						
Slovakia	6	5	1.20						
Latvia	1,872	2,880	0.65						

Summary	
Volume	+19.04%
Value	+13.33%
Unit price	-4.80%

Top 10 EU apple exporters (in % of total 2025/26)



Source: Freshfel Europe /WAPA
based on DG AGRI/ TAXUD portal



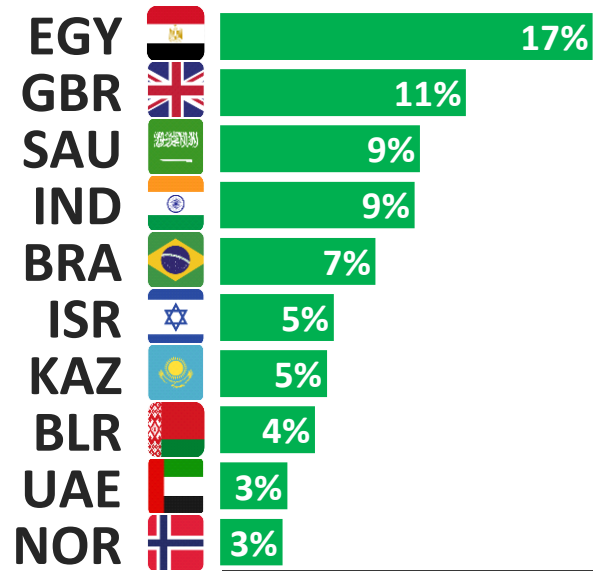
EU apples exports by destination



Week 50	2024/2025			2025/2026			YOY%		
	Euro Value	kg	Av. Value	Euro Value	kg	Av. Value	Euro Value	kg	Unit Value
Total	956,547,224	941,805,324	1.02	1,084,029,984	1,121,133,661	0.97	+13.33%	+19.04%	-4.80%
Egypt	103,374,060	143,108,939	0.72	141,362,007	184,996,873	0.76	+36.75%	+29.27%	+5.78%
United Kingdom	217,389,113	154,366,828	1.41	177,431,407	121,956,714	1.45	-18.38%	-21.00%	+3.31%
Saudi Arabia	79,220,384	72,346,078	1.10	111,258,688	99,168,239	1.12	+40.44%	+37.07%	+2.46%
India	47,026,238	51,672,448	0.91	85,971,149	96,510,483	0.89	+82.82%	+86.77%	-2.12%
Brazil	90,862,750	78,985,926	1.15	85,258,159	77,147,814	1.11	-6.17%	-2.33%	-3.93%
Israel	52,438,688	46,495,498	1.13	65,115,003	56,352,512	1.16	+24.17%	+21.20%	+2.45%
Kazakhstan	17,287,733	34,960,538	0.49	23,793,641	52,898,010	0.45	+37.63%	+51.31%	-9.04%
Belarus	18,285,070	27,441,381	0.67	25,869,747	46,997,756	0.55	+41.48%	+71.27%	-17.39%
United Arab Emirates	34,118,407	28,790,293	1.19	38,807,084	33,197,776	1.17	+13.74%	+15.31%	-1.36%
Norway	38,588,252	30,816,103	1.25	39,003,350	30,885,507	1.26	+1.08%	+0.23%	+0.85%
Jordan	20,789,742	25,424,420	0.82	23,149,843	29,347,112	0.79	+11.35%	+15.43%	-3.53%
Colombia	24,982,685	21,109,939	1.18	27,898,853	24,870,648	1.12	+11.67%	+17.81%	-5.21%
Bosnia and Herzegovina	7,324,637	15,939,258	0.46	9,511,000	21,848,234	0.44	+29.85%	+37.07%	-5.27%
Libya	16,412,628	16,062,892	1.02	22,863,433	21,081,224	1.08	+39.30%	+31.24%	+6.14%
Kyrgyzstan	4,380,131	7,232,640	0.61	13,407,295	20,807,018	0.64	+206.09%	+187.68%	+6.40%
Mongolia	12,753,162	17,313,398	0.74	13,020,160	15,494,133	0.84	+2.09%	-10.51%	+14.08%
Uzbekistan	4,834,051	8,254,442	0.59	7,173,758	13,171,686	0.54	+48.40%	+59.57%	-7.00%
Serbia	6,766,869	8,481,222	0.80	7,467,254	12,512,897	0.60	+10.35%	+47.54%	-25.20%
Switzerland	9,639,893	12,872,347	0.75	8,669,457	12,372,137	0.70	-10.07%	-3.89%	-6.43%
Ecuador	7,902,283	7,345,313	1.08	10,796,451	9,726,387	1.11	+36.62%	+32.42%	+3.18%
Morocco	7,307,192	9,032,265	0.81	6,134,132	9,613,798	0.64	-16.05%	+6.44%	-21.13%
Albania	6,134,264	10,834,214	0.57	6,571,862	9,386,008	0.70	+7.13%	-13.37%	+23.66%
Mauritania	6,586,337	7,942,839	0.83	7,336,382	8,260,261	0.89	+11.39%	+4.00%	+7.11%
Vietnam	15,263,358	10,718,148	1.42	10,632,235	8,072,051	1.32	-30.34%	-24.69%	-7.51%

Summary	
Volume	+19.04%
Value	+13.33%
Unit price	-4.80%

Top 10 EU apple destinations (in % of total 2025/26)



Source: Freshfel Europe /WAPA
Based on DG AGRI/TAXUD portal



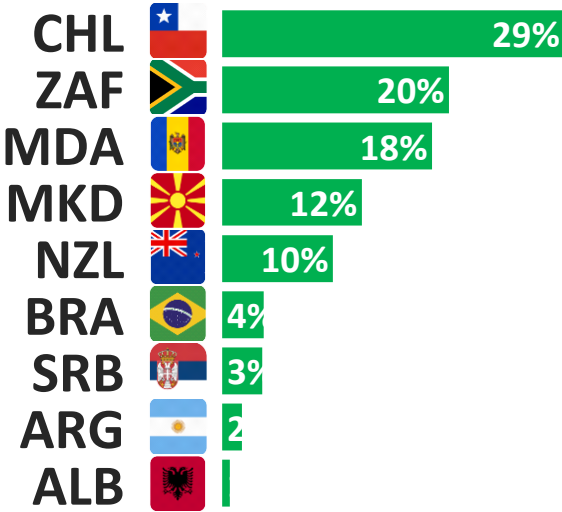
EU apple imports by origin



Week 50	2024/2025			2025/2026			YOY%		
	Euro Value	kg	Av. Value	Euro Value	kg	Av. Value	Euro Value	kg	Unit Value
Total	295,836,589	256,349,730	1.15	184,968,800	178,989,901	1.03	-37.48%	-30.18%	-10.45%
Chile	128,816,802	86,003,919	1.50	75,870,509	52,711,079	1.44	-41.10%	-38.71%	-3.90%
South Africa	67,099,417	52,898,027	1.27	40,784,549	34,964,860	1.17	-39.22%	-33.90%	-8.04%
Moldova	21,358,413	31,352,465	0.68	20,212,575	32,313,427	0.63	-5.36%	+3.07%	-8.18%
North Macedonia	8,151,055	21,995,145	0.37	5,881,039	21,496,984	0.27	-27.85%	-2.26%	-26.18%
New Zealand	32,019,443	24,248,459	1.32	23,652,309	17,058,188	1.39	-26.13%	-29.65%	+5.01%
Brazil	4,792,178	4,670,138	1.03	6,328,914	6,385,384	0.99	+32.07%	+36.73%	-3.41%
Serbia	9,632,762	14,185,828	0.68	4,159,977	6,190,093	0.67	-56.81%	-56.36%	-1.03%
Argentina	10,956,485	7,413,636	1.48	4,330,198	3,057,347	1.42	-60.48%	-58.76%	-4.17%
Albania	347,718	1,621,738	0.21	252,718	1,141,880	0.22	-27.32%	-29.59%	+3.22%
European Union	7,262,470	4,766,210	1.52	1,227,699	1,004,070	1.22	-83.10%	-78.93%	-19.76%
Ukraine	1,672,107	2,495,471	0.67	830,840	915,819	0.91	-50.31%	-63.30%	+35.39%
Switzerland	1,924,685	2,365,525	0.81	696,710	802,930	0.87	-63.80%	-66.06%	+6.65%
United Kingdom	76,005	160,384	0.47	65,321	420,034	0.16	-14.06%	+161.89%	-67.18%
China	513,024	331,945	1.55	347,872	239,220	1.45	-32.19%	-27.93%	-5.91%
Bosnia and Herzegovina	657,393	1,392,590	0.47	142,939	181,905	0.79	-78.26%	-86.94%	+66.46%
Israel	22,465	18,512	1.21	144,323	79,968	1.80	+542.43%	+331.98%	+48.72%
Türkiye	392,851	311,757	1.26	32,474	21,057	1.54	-91.73%	-93.25%	+22.38%
Kosovo	24,908	38,634	0.64	1,204	3,281	0.37	-95.16%	-91.51%	-43.06%
Syrian Arab Republic	1,072	1,575	0.68	1,135	1,650	0.69	+5.88%	+4.76%	+1.06%
United States of America	60,044	37,336	1.61	1,366	208	6.57	-97.73%	-99.44%	+308.69%
Bangladesh				380	150	2.54			
Vietnam	2,781	1,057	2.63	1,138	130	8.75	-59.06%	-87.70%	+232.71%
Armenia	10	1	9.50	415	103	4.03	+4268.42%	+10200.00%	-57.59%
Japan	2,232	79	28.25	1,899	100	18.99	-14.93%	+26.58%	-32.79%
Korea (Republic of)				132	25	5.27			
Sri Lanka				57	4	12.98			

Summary	
Volume	-30.18%
Value	-37.48%
Unit price	-10.45%

Top EU apple suppliers (in % of total 2025/26)



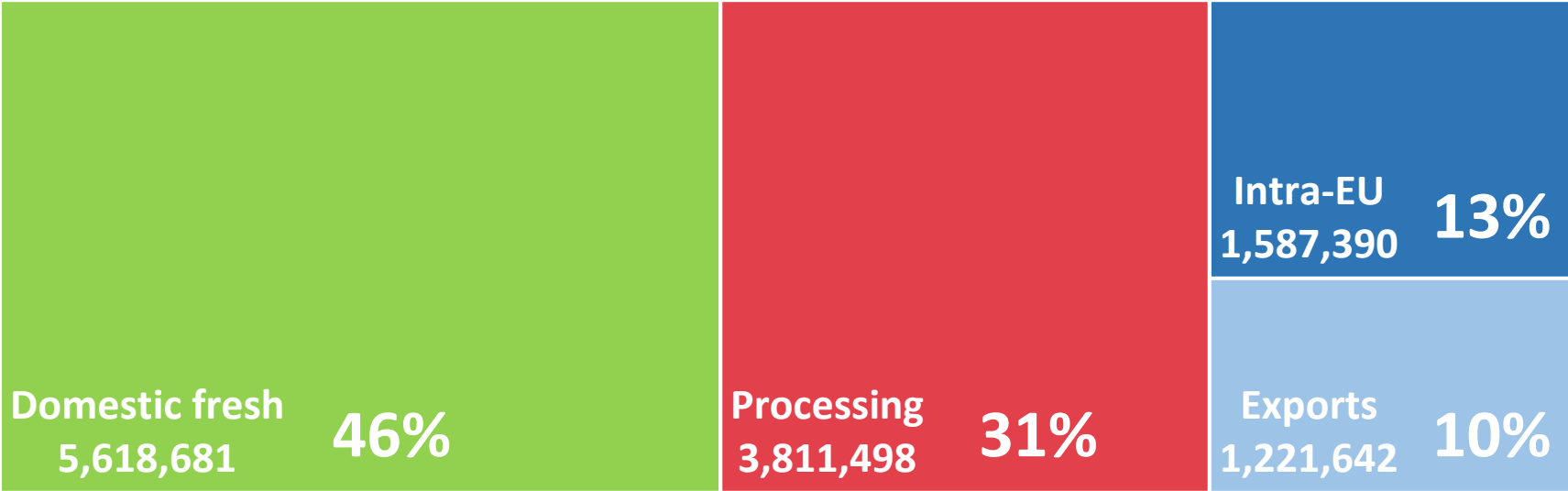
Source: Freshfel Europe /WAPA
Based on DG AGRI/TAXUD portal



Apples supply balance season 2025/26



In 1,000 t	2021/2022	2022/2023	2023/2024	2024/2025	2025/2026	YOY in %
PRODUCTION EU 27	12,405,450	12,540,740	12,052,520	11,523,800	12,239,210	↑ 6.21%
INTRA EU	1,605,763	1,550,330	1,642,935	1,734,389	1,587,390	↓ -8.48%
EXPORT	1,138,322	1,027,951	944,501	963,602	1,221,642	↑ 26.78%
PROCESSING	4,365,176	4,888,793	4,568,072	3,709,355	3,811,498	↑ 2.75%
FRESH	8,040,274	7,651,947	7,484,448	7,814,445	8,427,712	↑ 7.85%
DOMESTIC FRESH	5,296,189	5,073,666	4,897,012	5,116,455	5,618,681	↑ 9.82%
IMPORT EU 27	277,564	202,127	222,253	250,692	185,172	↓ -26.14%
MARKET SIZE FRESH	7,179,516	6,826,123	6,762,200	7,101,535	7,391,242	↑ 4.08%
POPULATION EU 27	445,767,723	445,999,571	447,805,685	449,489,862	451,284,558	↑ 0.40%
KG PER CAPITA/ YEAR	16.11	15.31	15.10	15.80	16.38	↑ 3.67%



Source: Prognosfruit

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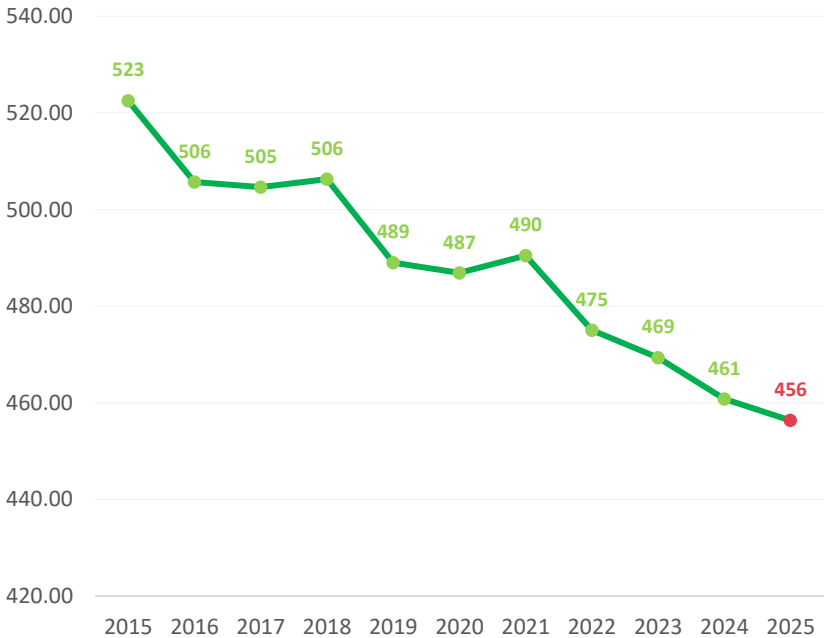
Outlook season 2026/2027

Acreage of production up to 2025



In 1,000 ha		2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
EU-27		522.53	505.69	504.63	506.28	489.04	486.88	490.48	475.08	469.38	460.80	456.35
	Poland	180.40	164.76	162.53	166.15	155.62	152.60	161.90	151.90	150.00	148.00	146.00
	Italy	52.16	56.16	57.26	57.44	55.00	54.91	54.47	53.73	54.08	53.38	53.82
	Romania	55.88	55.53	55.60	53.94	52.74	52.34	53.82	54.07	54.29	53.60	53.63
	France	49.65	49.65	50.31	50.54	50.37	54.71	54.21	54.02	53.80	52.76	51.74
	Germany	31.74	31.74	33.98	33.98	33.98	33.98	33.98	33.11	33.11	33.11	32.69
	Spain	30.72	30.87	30.55	29.93	27.59	27.19	27.39	26.19	25.93	25.81	25.71
	Hungary	32.80	32.49	32.17	31.84	30.97	25.97	25.02	23.82	22.79	22.56	21.68
	Portugal	14.01	14.16	13.85	13.61	14.31	14.31	13.92	13.73	13.94	13.65	13.65
	Greece	11.85	10.04	9.60	10.35	9.82	14.38	10.28	10.65	9.75	9.10	9.06
	Lithuania	10.68	9.70	9.82	10.13	10.18	10.50	10.18	9.88	9.03	8.37	8.36
	Austria	6.62	6.67	6.67	6.74	6.59	6.43	6.35	6.30	6.25	5.98	5.83
	Czechia	8.31	7.49	7.35	7.25	7.32	7.19	7.11	7.01	6.45	5.44	5.46
	Netherlands	7.60	7.30	7.00	6.60	6.42	6.20	5.97	5.90	5.50	5.25	5.06
	Belgium	6.87	6.49	6.16	5.99	5.79	5.48	5.35	5.23	4.90	4.49	4.46
	Croatia	5.76	5.89	4.84	4.73	4.95	4.36	4.39	3.65	3.65	3.83	3.80
	Bulgaria	4.77	4.11	3.97	3.98	4.14	3.56	3.78	3.72	3.56	3.53	3.76
	Latvia	2.40	2.40	3.30	3.20	3.44	3.50	3.20	3.06	3.30	3.10	3.00
	Slovenia	2.47	2.42	2.36	2.33	2.27	2.16	2.09	2.03	2.00	1.91	1.88
	Slovakia	2.38	2.31	2.18	2.14	2.06	1.80	1.64	1.54	1.54	1.53	1.48
	Denmark	1.39	1.35	1.28	1.42	1.39	1.38	1.40	1.52	1.45	1.47	1.40
	Sweden	1.33	1.54	1.40	1.41	1.52	1.44	1.46	1.45	1.45	1.42	1.40
	Ireland	0.64	0.70	0.70	0.71	0.71	0.71	0.71	0.71	0.71	0.71	0.71
	Estonia	0.60	0.51	0.48	0.60	0.57	0.62	0.73	0.71	0.75	0.67	0.66
	Finland	0.63	0.62	0.63	0.63	0.65	0.67	0.62	0.62	0.66	0.63	0.61
	Cyprus	0.61	0.53	0.37	0.37	0.37	0.41	0.41	0.43	0.39	0.39	0.38
	Luxembourg	0.26	0.26	0.27	0.27	0.27	0.08	0.10	0.10	0.10	0.11	0.12
	Malta	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

EU-27 apple production area (1,000 ha)



Source: Prognosfruit/ Eurostat

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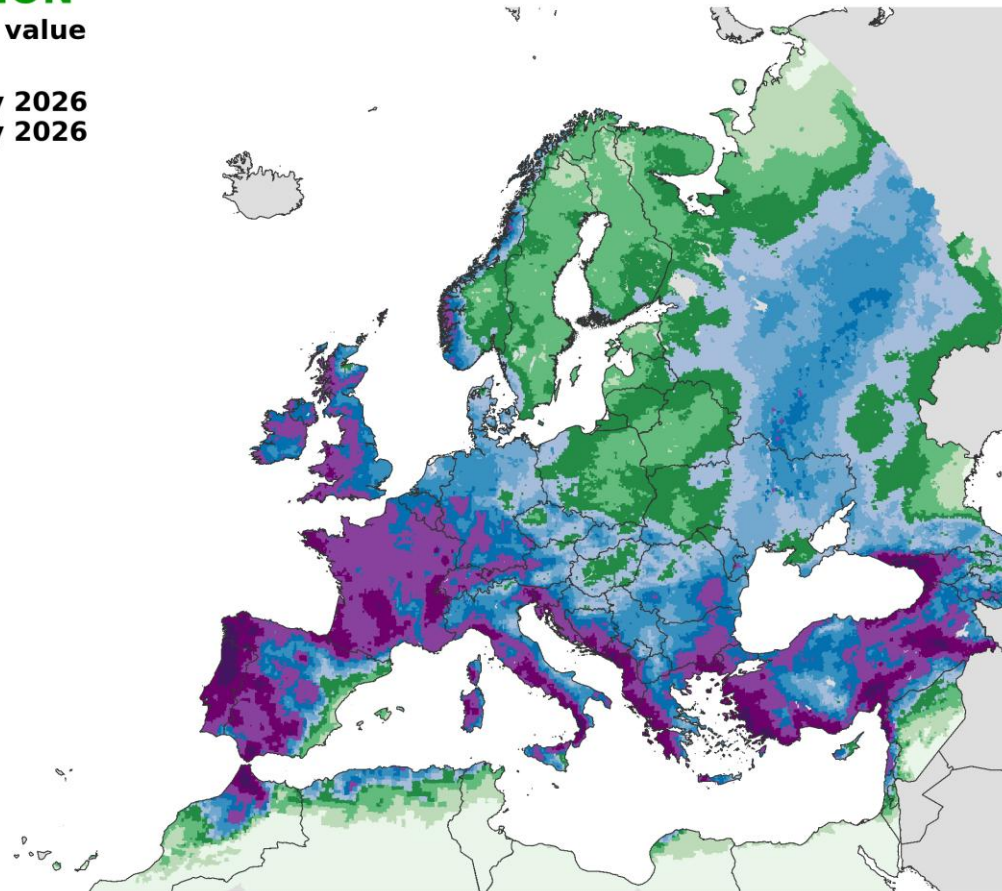
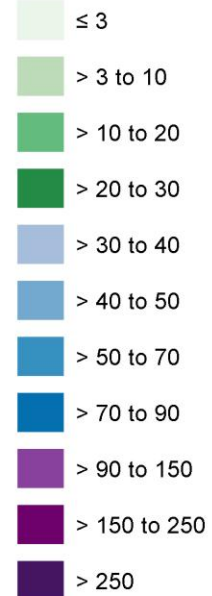
Water from excess to scarcity in 1st semester 2026

PRECIPITATION

Cumulative daily value

from: **01 February 2026**
to: **28 February 2026**

Units: mm



Created: 12.04.2026
Resolution: 10 x 10 km
Data: based on JRC MARS



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Source: EC Joint Research Centre

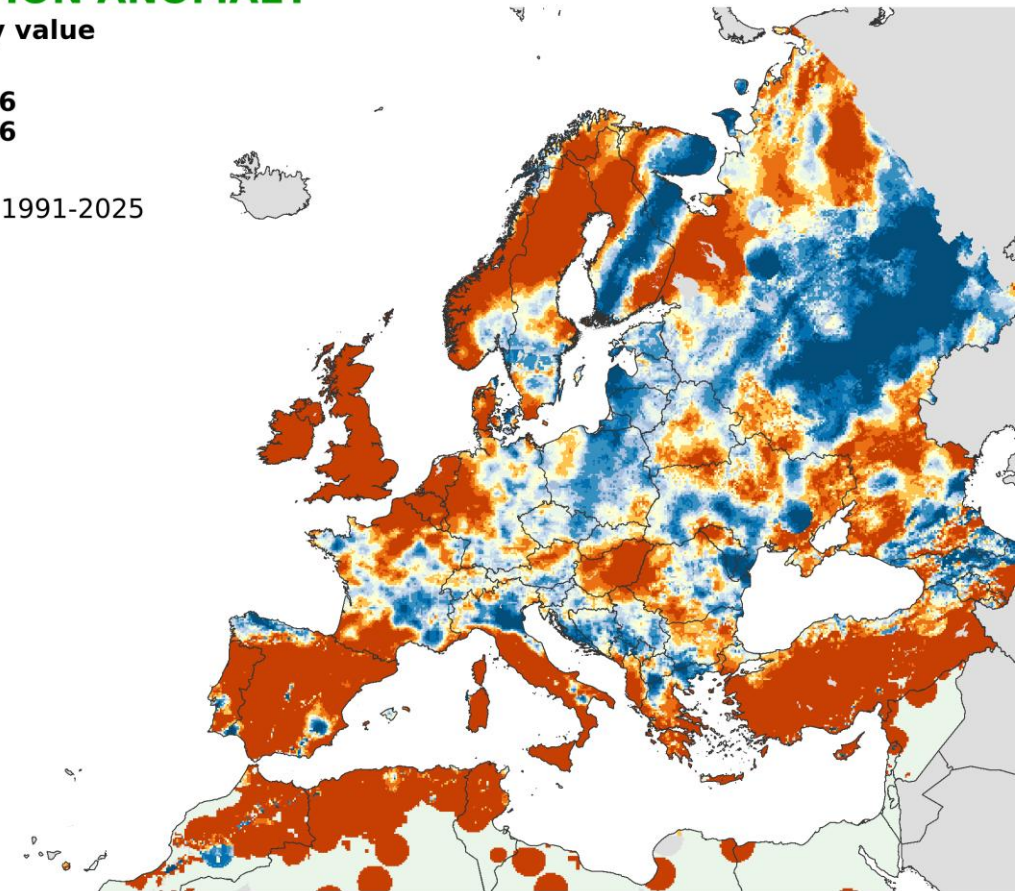
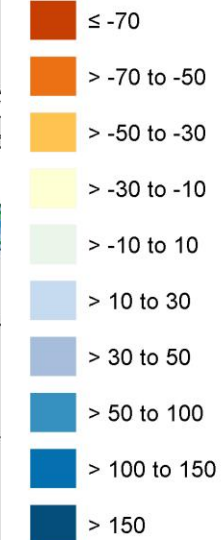
PRECIPITATION ANOMALY

Cumulative daily value

from: **11 July 2026**
to: **20 July 2026**

Reference period: 1991-2025

Units: %



Created: 21.07.2026
Resolution: 10 x 10 km
Data: based on JRC MARS



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Source: EC Joint Research Centre

Late frost (April-May 2026)

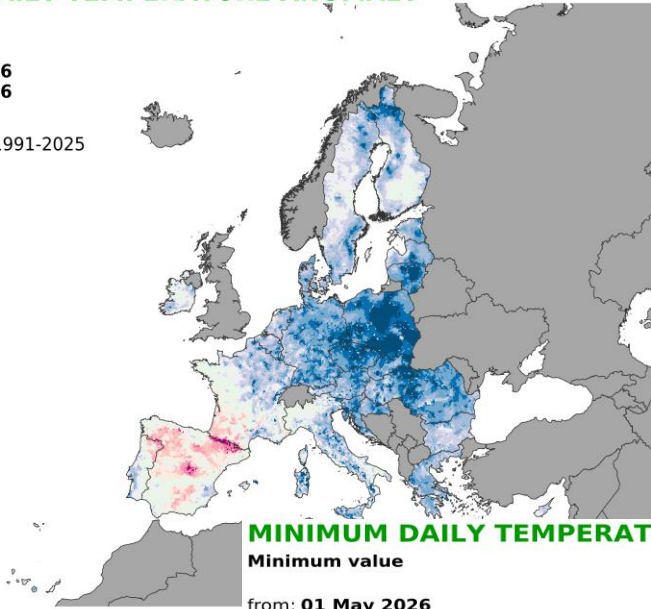
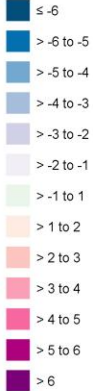
MINIMUM DAILY TEMPERATURE ANOMALY

Minimum value

from: 21 April 2026
to: 30 April 2026

Reference period: 1991-2025

Units: °C



Created: 02.05.2026
Resolution: 10 x 10 km
Data: based on JRC MARS



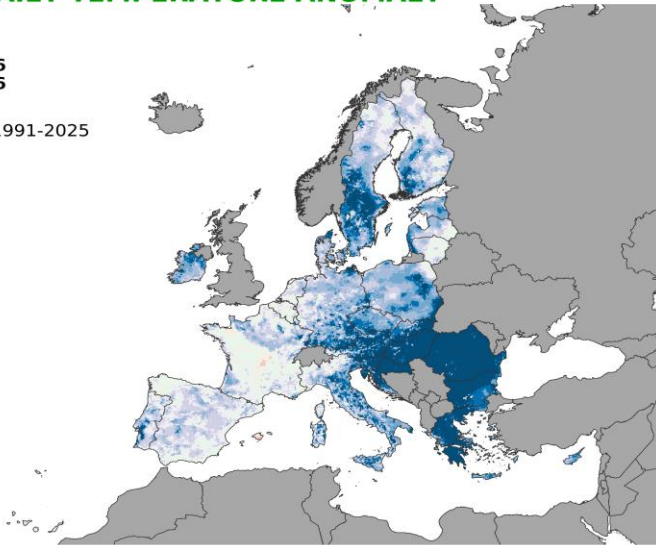
MINIMUM DAILY TEMPERATURE ANOMALY

Minimum value

from: 01 May 2026
to: 10 May 2026

Reference period: 1991-2025

Units: °C

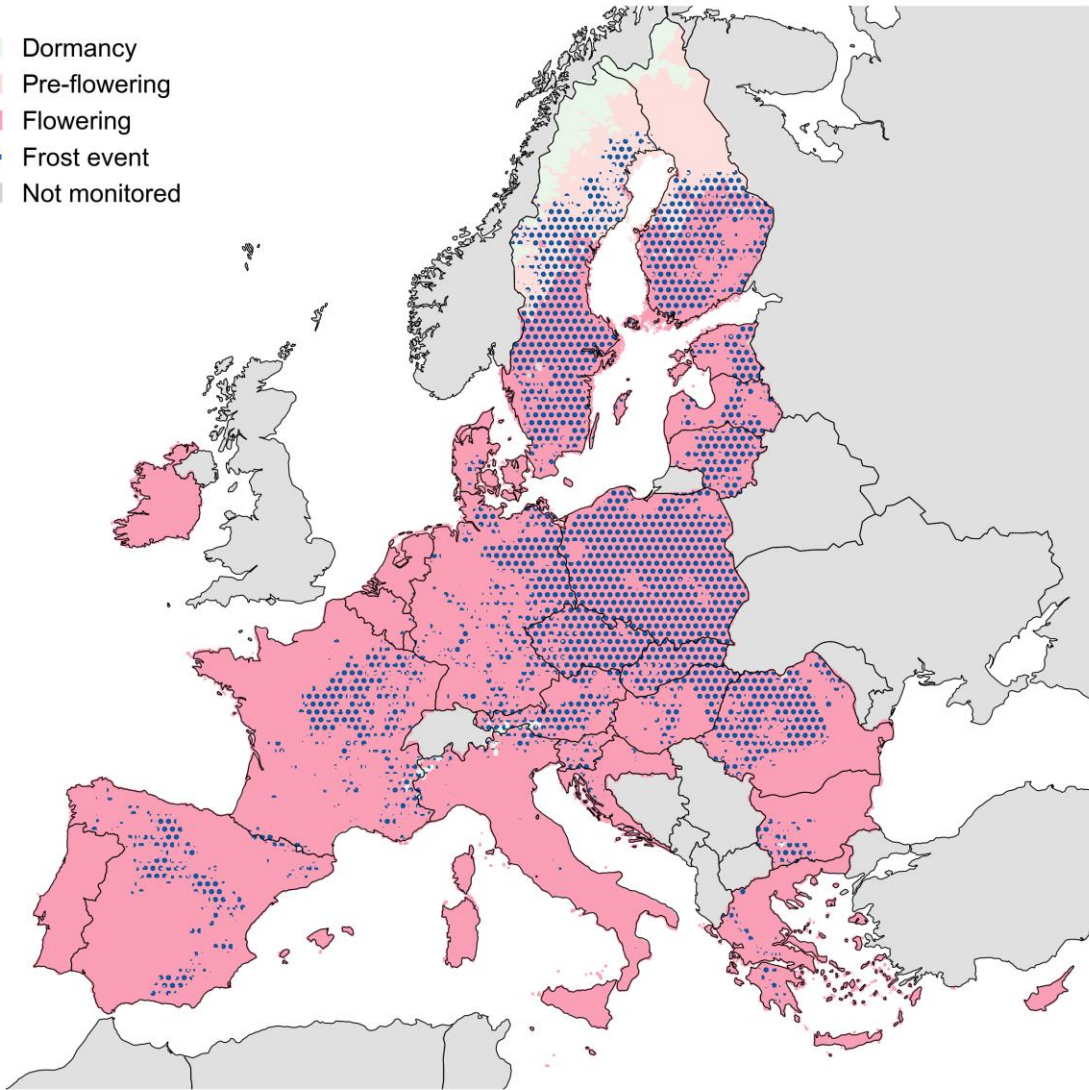
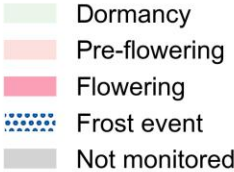


Created: 11.05.2026
Resolution: 10 x 10 km
Data: based on JRC MARS



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Source: EC Joint Research Centre

Observed Frost and Estimated Apple Flowering Onset Through Dekad 2, May 2026



Created: 03.06.2026
Resolution: 10 x 10 km
Data: based on JRC MARS and ECMWF



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Source: EC Joint Research Centre

Source: DG AGRI/ JRC, Agri4cast

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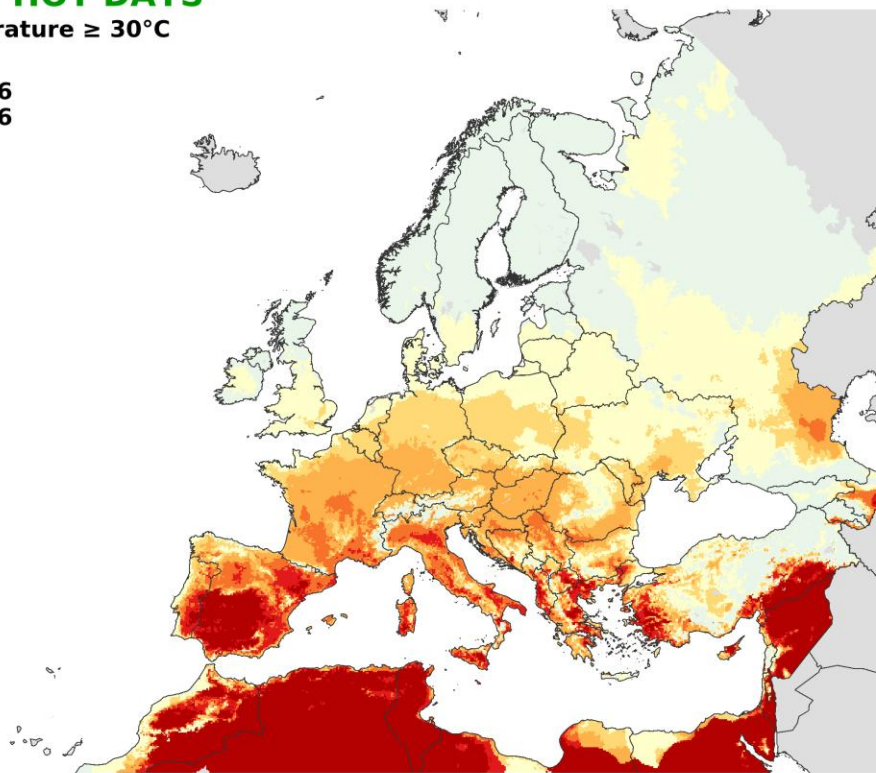
More heat waves in late spring and summers

NUMBER OF HOT DAYS

Maximum temperature $\geq 30^{\circ}\text{C}$

from: 01 June 2026
to: 30 June 2026

Units: days



Created: 01.07.2026
Resolution: 10 x 10 km
Data: based on JRC MARS



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Source: EC Joint Research Centre

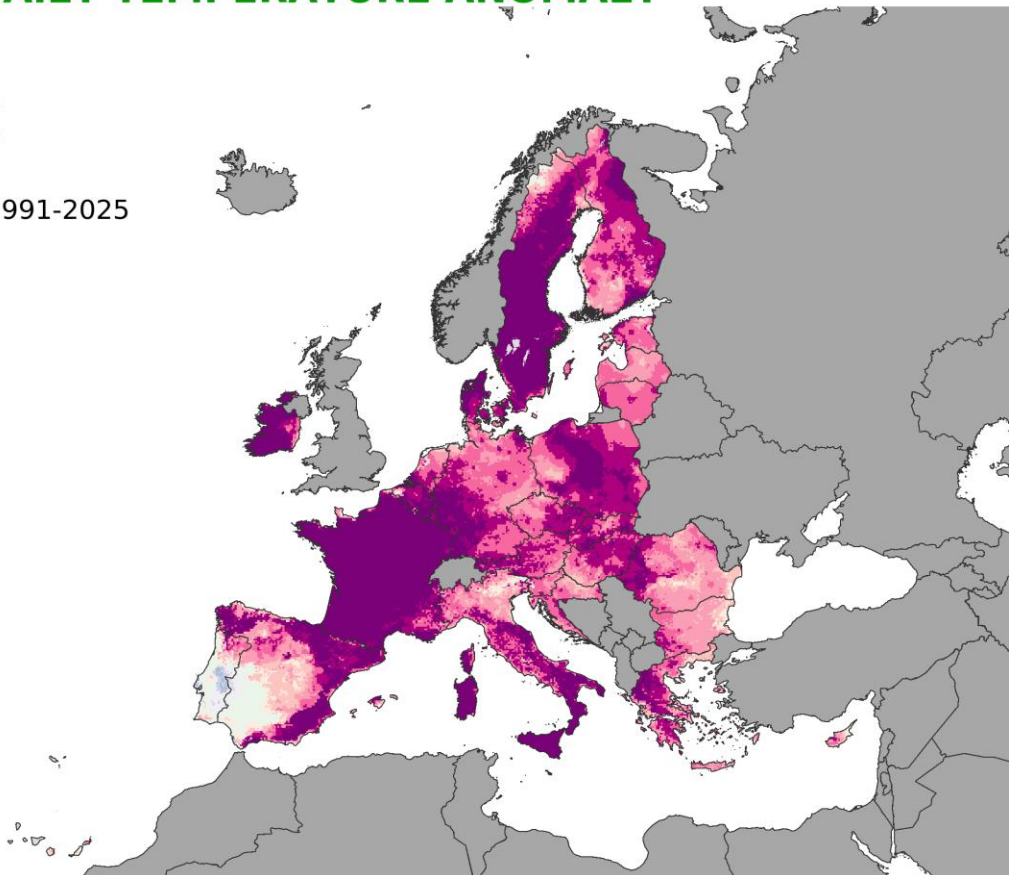
MAXIMUM DAILY TEMPERATURE ANOMALY

Maximum value

from: 11 July 2026
to: 20 July 2026

Reference period: 1991-2025

Units: $^{\circ}\text{C}$



Created: 21.07.2026
Resolution: 10 x 10 km
Data: based on JRC MARS



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Source: EC Joint Research Centre

EU apple forecast for the 2026/2027 season



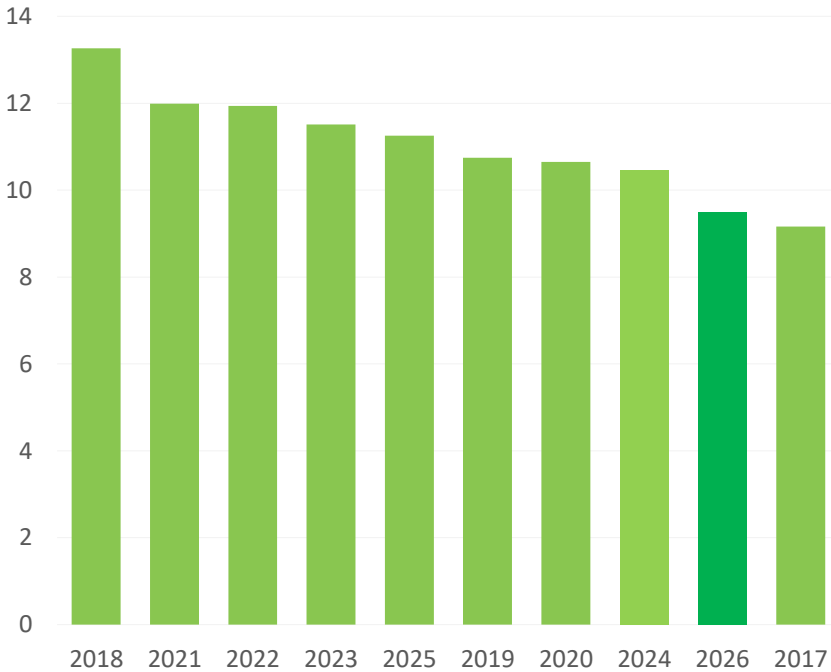
Year	Volume (million t)
2017	9.16
2018	13.26
2019	10.75
2020	10.65
2021	11.99
2022	11.94
2023	11.51
2024	10.47
2025	11.25
2026	9.50

Apple production (million t) by year



Year	Volume (million t)
2018	13.26
2021	11.99
2022	11.94
2023	11.51
2025	11.25
2019	10.75
2020	10.65
2024	10.47
2026	9.50
2017	9.16

Apple production (million t) by volume



9th largest crop of the last 10 year, about 15% lower than long term average with 3-5-10 years outlook

Year	Volume (million t)	VAR %
9Y AVG	11.22	↓ -15.36%
5Y AVG	11.43	↓ -16.94%
3Y AVG	11.08	↓ -14.29%
2025	11.25	↓ -15.62%
2026	9.50	



Source: Prognosfruit

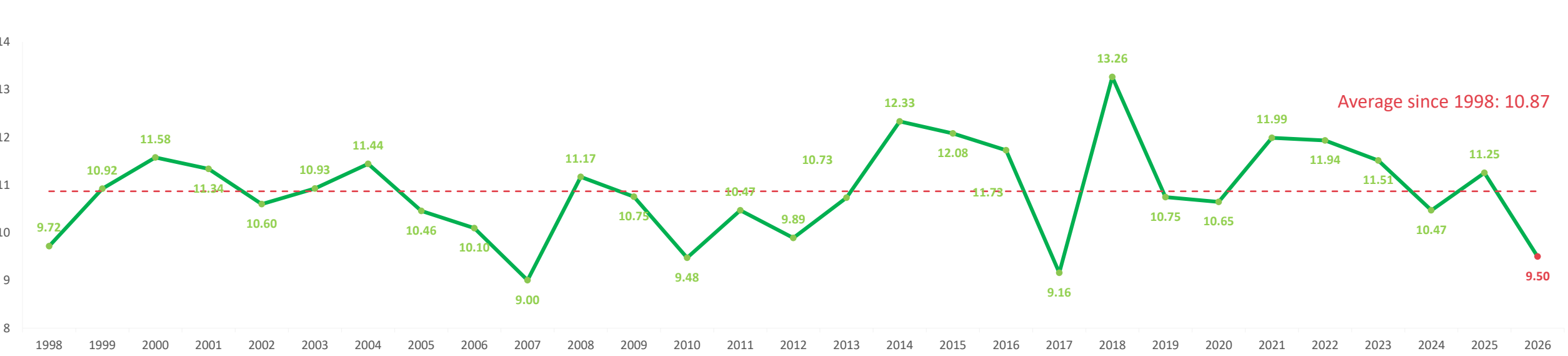
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EU apple production 3-decade overview



EU apple production (million t)



Largest EU apple producers (in % of 2026 forecast)



Source: Prognosfruit

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EU apple forecast for the 2026/2027 season



		2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	YOY	3Y AVG
	Austria	67	184	146	126	120	151	116	75	138	90	⬇️-35.00%	⬇️-18.21%
	Belgium	88	231	242	168	250	239	203	160	222	166	⬇️-25.07%	⬇️-14.84%
	Croatia	66	86	60	55	65	57	66	66	48	64	⬆️ 33.10%	⬆️ 6.81%
	Czechia	102	145	103	118	110	138	101	36	117	53	⬇️-54.78%	⬇️-37.50%
	Denmark	19	24	15	24	18	24	15	21	24	25	⬆️ 4.17%	⬆️ 25.00%
	France	1,424	1,477	1,651	1,337	1,383	1,391	1,508	1,432	1,533	1,162	⬇️-24.20%	⬇️-22.07%
	Germany	597	1,093	991	1,023	1,005	1,072	941	872	1,138	1,013	⬇️-10.94%	⬆️ 3.01%
	Greece	231	301	276	280	246	321	183	245	190	291	⬆️ 53.62%	⬆️ 41.40%
	Hungary	530	782	452	350	520	280	550	330	170	135	⬇️-20.59%	⬇️-61.43%
	Italy	1,704	2,264	2,096	2,124	2,053	2,113	2,175	2,329	2,319	2,269	⬇️ -2.16%	⬇️ -0.23%
	Latvia	8	14	10	14	8	10	8	8	6	6	➡️ 0.00%	⬇️-17.05%
	Lithuania	48	62	26	52	36	51	27	35	4	17	⬆️325.00%	⬇️-22.73%
	Netherlands	228	267	272	220	243	235	199	194	236	195	⬇️-17.50%	⬇️ -7.14%
	Poland	2,870	4,810	2,910	3,410	4,300	4,495	3,970	3,190	3,800	2,665	⬇️-29.87%	⬇️-27.05%
	Portugal	314	267	354	278	368	291	295	313	280	280	➡️ 0.00%	⬇️ -5.37%
	Romania	340	635	493	537	594	543	534	491	442	430	⬇️ -2.71%	⬇️-12.09%
	Slovakia	15	44	35	30	31	32	27	36	32	36	⬆️ 12.53%	⬆️ 15.27%
	Slovenia	6	72	36	46	44	50	47	58	35	42	⬆️ 18.87%	⬇️-10.57%
	Spain	480	476	555	425	563	412	518	546	488	525	⬆️ 7.53%	⬆️ 1.48%
	Sweden	22	31	22	29	32	32	32	32	32	32	➡️ 0.00%	➡️ 0.00%
	Total	9,158	13,264	10,746	10,646	11,989	11,936	11,514	10,469	11,254	9,496	⬇️15.62%	⬇️14.29%



Source: Prognosfruit

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EU apple forecast for the 2026/2027 season

	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	YOY	3Y AVG
Annurca	35	40	45	45	45	45	38	40	42	38	↓ -10.00%	↓ -5.50%
Boskoop	34	66	55	46	61	84	50	45	62	43	↓ -31.33%	↓ -18.20%
Braeburn	199	281	254	221	205	202	189	166	182	153	↓ -15.93%	↓ -14.45%
Cortland	0	0	0	0	0	0	0	0	0	0		
Cox	4	4	3	17	16	14	9	10	15	12	↓ -18.92%	↑ 6.51%
Cripps Pink	260	276	289	273	256	319	318	321	369	343	↓ -7.21%	↑ 2.00%
Elstar	265	357	363	312	333	376	293	305	371	304	↓ -18.24%	↓ -6.04%
Fuji	290	332	316	313	306	334	307	312	280	282	↑ 0.58%	↓ -6.09%
Gala	1,225	1,413	1,387	1,390	1,534	1,463	1,519	1,428	1,496	1,363	↓ -8.88%	↓ -7.97%
Gloster	166	190	145	154	201	141	122	121	131	110	↓ -15.61%	↓ -11.32%
Golden Delicious	1,931	2,450	2,293	2,001	2,199	1,972	2,196	2,078	2,035	1,810	↓ -11.08%	↓ -13.94%
Granny Smith	363	393	373	365	347	410	338	356	360	345	↓ -4.08%	↓ -1.77%
Idared	651	1,214	621	659	760	669	618	510	517	416	↓ -19.69%	↓ -24.20%
Jonagold	298	581	395	315	468	405	353	302	335	243	↓ -27.42%	↓ -26.30%
Jonagored	326	563	246	250	251	208	186	134	194	130	↓ -33.03%	↓ -24.27%
Jonathan	126	198	118	118	104	121	133	116	100	95	↓ -4.56%	↓ -18.23%
Ligol	250	350	150	210	280	260	220	160	200	130	↓ -35.00%	↓ -32.76%
Lobo	0	0	0	0	0	0	0	0	0	0		
Morgendurf/imperatore	54	58	48	54	32	32	28	60	56	64	↑ 13.56%	↑ 33.68%
Pinova	85	156	141	162	195	207	207	192	222	185	↓ -16.54%	↓ -10.54%
Red Delicious	573	759	693	677	692	694	599	602	524	497	↓ -5.28%	↓ -13.67%
Red Jonaprince	113	371	407	441	471	579	470	350	488	304	↓ -37.71%	↓ -30.25%
Reinette Grise du Canada	89	148	134	136	141	151	157	154	136	125	↓ -8.01%	↓ -16.07%
Shampion	416	570	414	423	465	454	422	355	381	297	↓ -21.89%	↓ -22.92%
Spartan	2	4	2	4	4	0	0	0	0	0	↓ -7.08%	↑ 48.79%
Stayman	8	7	2	2	0	0	0	0	0	0		
Other	1,202	2,140	1,544	1,749	2,283	2,297	2,082	1,759	2,122	1,514	↓ -28.66%	↓ -23.85%
Other new varieties	192	342	307	309	340	497	658	594	634	694	↑ 9.42%	↑ 10.34%
Total	9,158	13,264	10,746	10,646	11,989	11,936	11,514	10,469	11,254	9,496	↓ -15.62%	↓ -14.29%



Source: Prognosfruit

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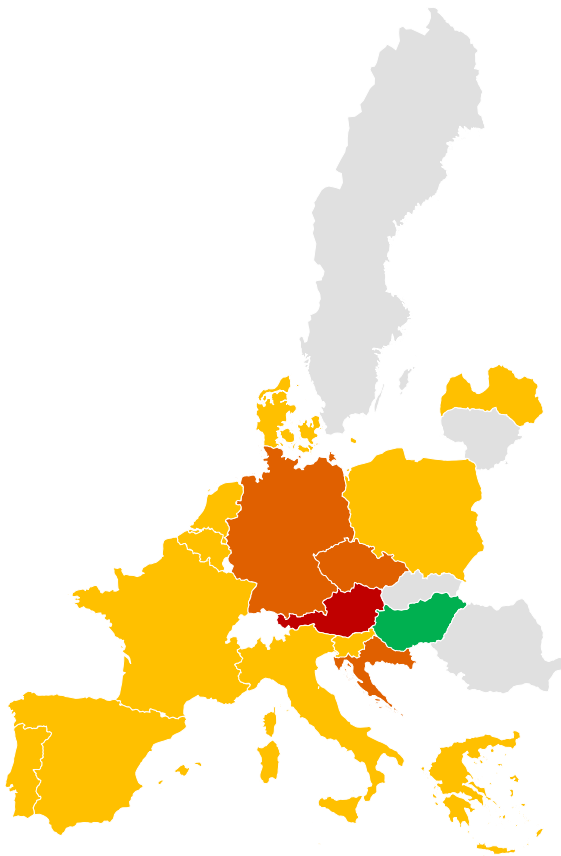
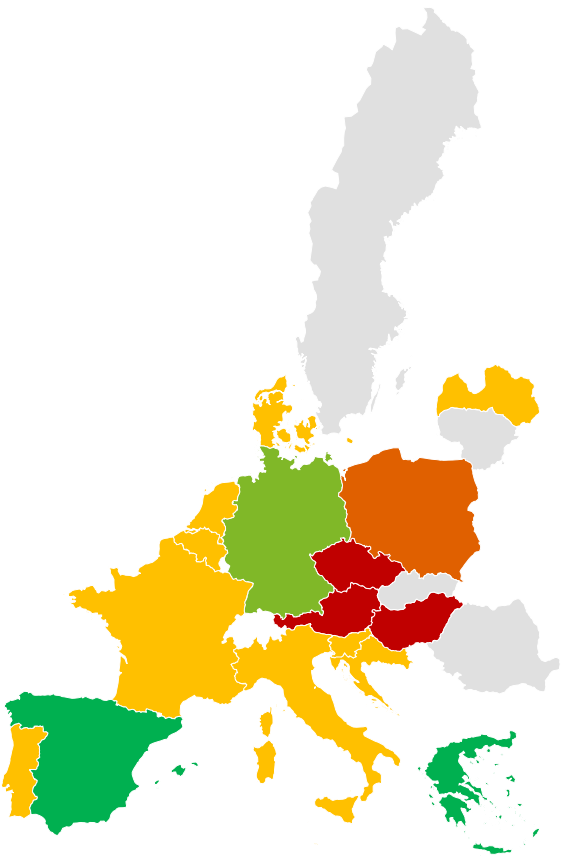
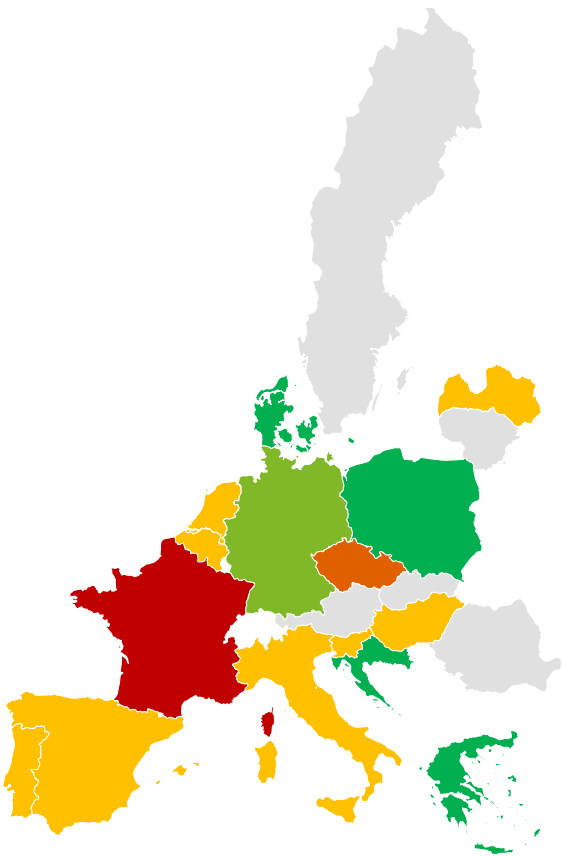
Qualitative assessment of the 2026/2027 season



Blossoming

Fruit setting

Physiological drop

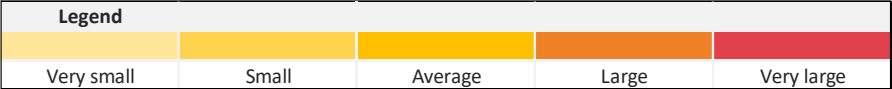
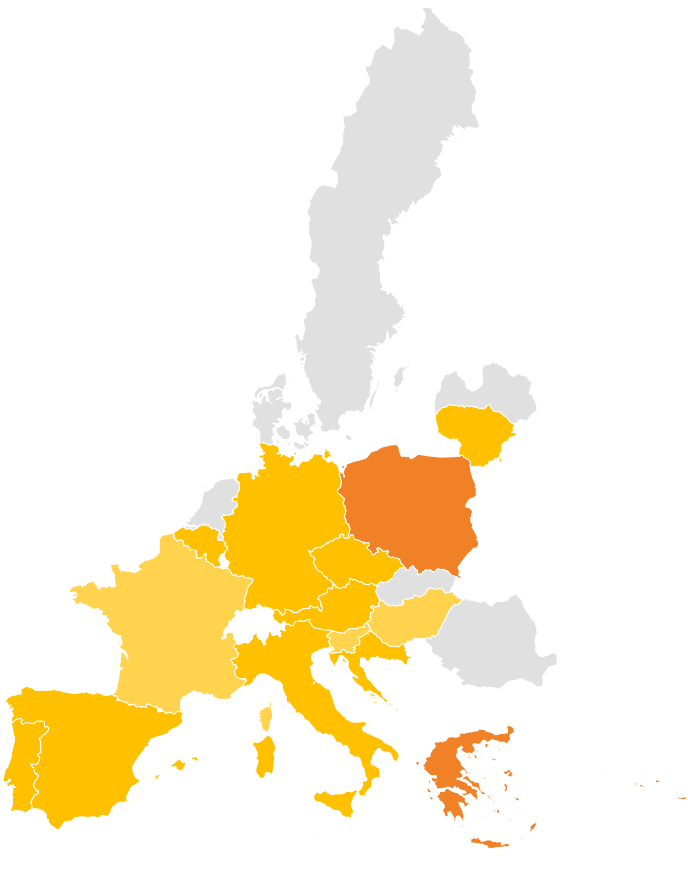


Legend				
Scarce	Normal/scarce	Normal	Normal/abundant	Abundant

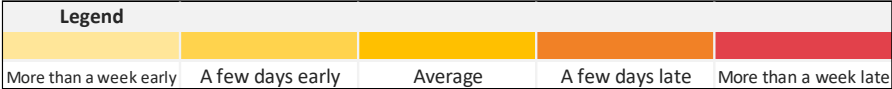
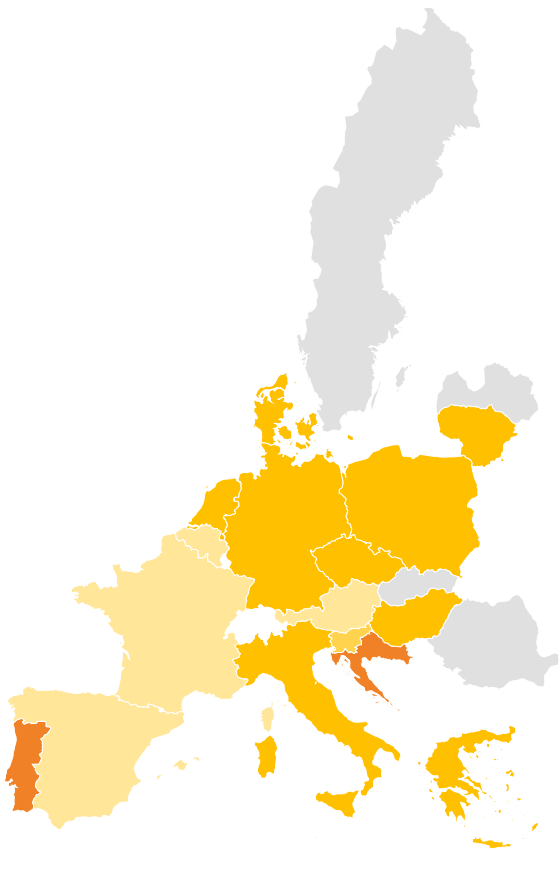
Qualitative assessment of the 2026/2027 season



Size



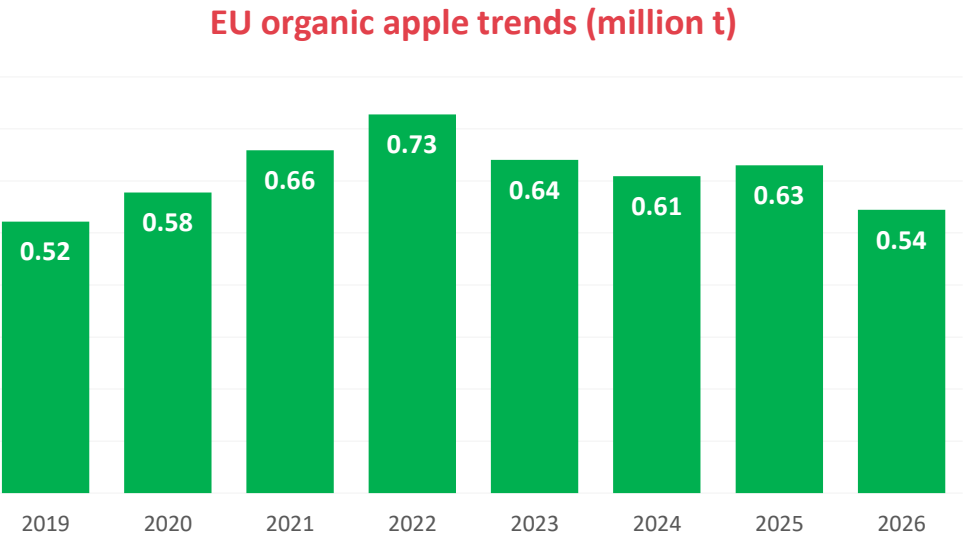
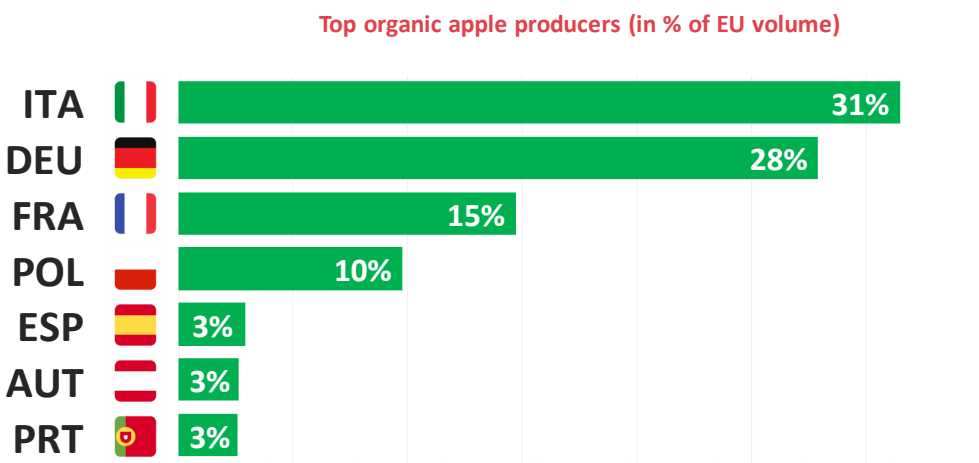
Timing



EU apple organic trends for the 2026/2027 season



	In 1.000 t	2019	2020	2021	2022	2023	2024	2025	2026	YOY in 1.000 t	YOY in %
	Austria	25	21	24	24	26	17	22	14	↓ -7.73	↓ -35.00%
	Belgium	10	7	10	10	8	6	4	3	↓ -1.11	↓ -25.07%
	Croatia	2	1	1	1	1	1	0	1	↑ 0.16	↑ 33.10%
	Czechia	3	4	2	3	2	1	2	1	↓ -1.81	↓ -77.39%
	Denmark	1	2	0	0	1	2	2	2	↑ 0.08	↑ 4.17%
	France	116	107	111	139	106	100	107	80	↓ -27.13	↓ -25.28%
	Germany	89	102	111	182	151	148	171	152	↓ -18.68	↓ -10.94%
	Greece	6	7	7	13	6	5	4	6	↑ 2.03	↑ 53.62%
	Hungary	14	25	47	17	39	23	12	7	↓ -5.15	↓ -43.28%
	Italy	126	170	191	192	167	186	175	171	↓ -3.23	↓ -1.85%
	Latvia	3	4	2	3	2	2	1	1	→ 0.00	→ 0.00%
	Lithuania	1	1	0	1	0	0	0	0	↑ 0.13	↑ 325.00%
	Netherlands	16	13	10	7	6	8	12	10	↓ -2.07	↓ -17.50%
	Poland	58	68	86	90	79	64	76	53	↓ -22.70	↓ -29.87%
	Portugal	18	14	18	15	15	16	14	14	→ 0.00	→ 0.00%
	Romania	10	11	12	11	11	10	9	9	↓ -0.24	↓ -2.71%
	Slovakia	1	1	1	1	1	1	1	1	↑ 0.12	↑ 12.53%
	Slovenia	1	1	1	2	3	1	1	1	↑ 0.20	↑ 18.87%
	Spain	22	17	23	16	16	16	15	16	↑ 1.10	↑ 7.53%
	Sweden	2	2	3	3	3	3	3	3	→ 0.00	→ 0.00%
	Total	522	578	659	728	640	609	630	544	↓ -86.01	↓ -13.65%



Source: Prognosfruit

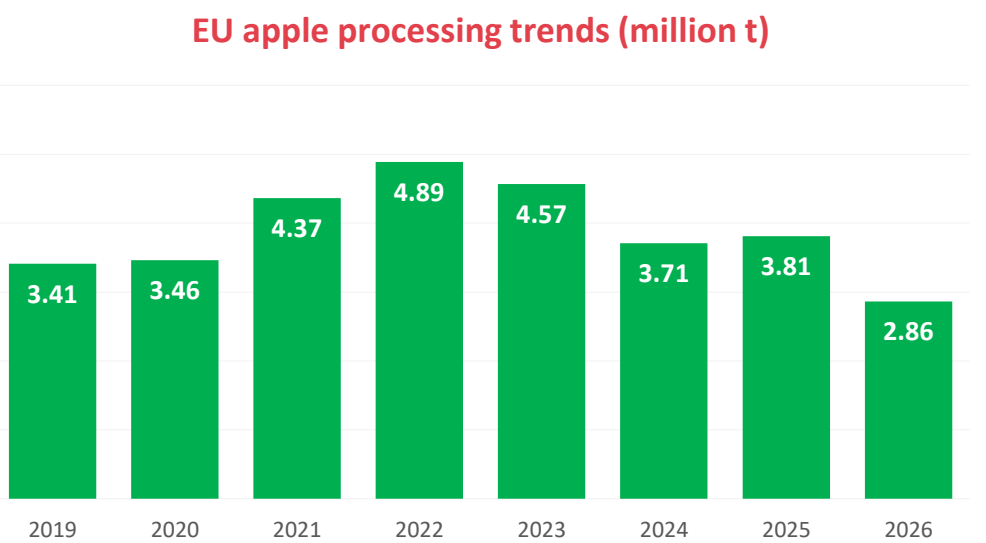
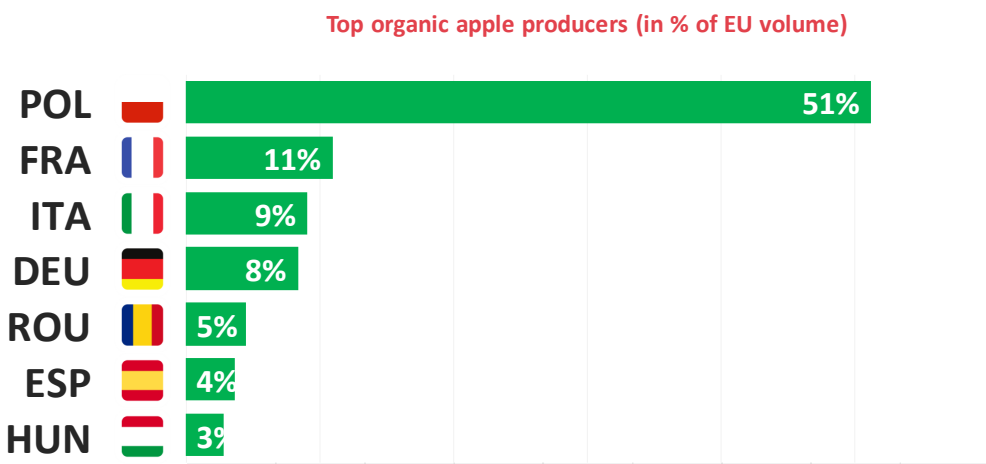
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EU apple processing trends for the 2026/2027 season



	In 1.000 t	2019	2020	2021	2022	2023	2024	2025	2026	YOY in 1.000 t	YOY in %
	Austria	44	38	36	45	35	23	41	27	↓ -14.49	↓ -35.00%
	Belgium	48	25	107	107	61	43	100	75	↓ -25.12	↓ -25.07%
	Croatia	12	11	16	11	20	16	12	16	↑ 3.97	↑ 33.10%
	Czechia	51	65	61	62	35	18	35	18	↓ -16.55	↓ -47.25%
	Denmark	4	6	0	0	4	5	6	6	↑ 0.25	↑ 4.17%
	France	330	227	263	320	302	315	353	314	↓ -38.85	↓ -11.02%
	Germany	317	307	251	322	235	262	270	240	↓ -29.51	↓ -10.94%
	Greece	69	70	61	48	46	61	47	73	↑ 25.41	↑ 53.62%
	Hungary	339	245	364	190	429	248	102	81	↓ -21.00	↓ -20.59%
	Italy	377	255	257	313	294	326	284	261	↓ -23.70	↓ -8.33%
	Latvia	5	7	4	5	4	4	3	3	→ 0.00	→ 0.00%
	Lithuania	8	13	9	13	7	9	1	4	↑ 3.25	↑ 325.00%
	Netherlands	41	29	30	29	25	29	24	19	↓ -4.13	↓ -17.50%
	Poland	1,455	1,876	2,580	3,147	2,779	2,074	2,280	1,466	↓ -814.25	↓ -35.71%
	Portugal	18	14	18	15	15	16	14	14	→ 0.00	→ 0.00%
	Romania	172	183	172	168	166	147	133	129	↓ -3.60	↓ -2.71%
	Slovakia	0	0	0	0	0	2	2	2	↑ 0.20	↑ 12.53%
	Slovenia	8	9	22	10	9	3	7	8	↑ 1.33	↑ 18.87%
	Spain	111	85	113	82	104	109	98	105	↑ 7.35	↑ 7.53%
	Sweden	0	0	0	0	0	0	0	0	→ 0.00	→ 0.00%
	Total	3,411	3,465	4,365	4,889	4,568	3,709	3,811	2,862	↓ -949.42	↓ -24.91%



Source: Prognosfruit

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Extra-EU apple forecast for the 2026/2027 season

EU Neighborhood



-9.3% at 177,000 t



-9,6% at 98,000 t



+104.2% at 4,670,000 t



+15% at 1,150,000 t



+20.7% at 317,000 t



+17.8% at 526,000 t

Elsewhere in NH



+0.6% at 34,500,000 t



-10.4% at 4,403,000 t



-10.4% at 2.300.000 t

Northern Hemisphere – Southern Hemisphere balance

Production (1.000 t)	2025	2026	YOY
Northern Hemisphere	57,376	57,667	
EU	11,254	9,496	
EU Neighborhood	4,300	6,938	
<i>Moldova</i>	<i>447</i>	<i>526</i>	
<i>Serbia</i>	<i>263</i>	<i>317</i>	
<i>Switzerland</i>	<i>108</i>	<i>98</i>	
<i>Turkey</i>	<i>2,287</i>	<i>4,670</i>	
<i>UK</i>	<i>195</i>	<i>177</i>	
<i>Ukraine</i>	<i>1,000</i>	<i>1,150</i>	
India	2,600	2,330	
USA	4,913	4,403	
China	34,310	34,500	
Southern Hemisphere	4,325	4,509	
<i>Argentina</i>	<i>555</i>	<i>515</i>	
<i>Australia</i>	<i>226</i>	<i>228</i>	
<i>Brazil</i>	<i>823</i>	<i>1,031</i>	
<i>Chile</i>	<i>920</i>	<i>874</i>	
<i>New Zealand</i>	<i>545</i>	<i>545</i>	
<i>South Africa</i>	<i>1,257</i>	<i>1,317</i>	
Total	61,702	62,177	

WAPA's selection of NH + SH
countries cover **around 70%** of
global production, estimated at
97.88 million t
(source: FAOSTAT)

2026 agenda: some policy topics to keep in the radar

CAP reform and MFF => Securing a fair share of support for F&V within «ring-fenced» budget and national envelopes

Omnibus X => an opportunity for the toolbox within the food security and competitiveness debate

PPWR => Getting ready for the 12/08/2026 and monitoring

NBT => Preparation for market entry by 2028

Promotion=> concerns about budget cuts

Public procurement => opportunities to seize (as well as in School Scheme?)

Trade => ongoing uncertainties amidst new FTA and geopolitical context

Health and nutrition => position F&V as best prevention of obesity and NCD and within the GLP-1 debate



APPLES are a nutritious fruit:



High in fibre



**Saturated
fat free**



**Naturally
fat free**



Low fat food



**Naturally
occurring
sugars**



**Naturally
sodium free**



**Contain
fructose**



**Naturally
salt free**

