

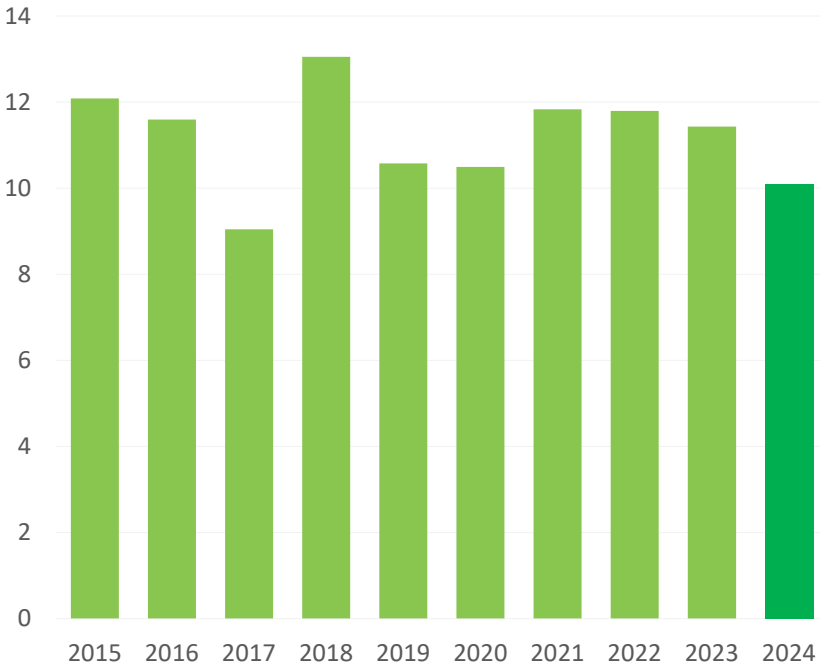
European and Polish Apples and Pears perspective Season 2024/2025

EU apple forecast for the 2024/2025 season

Source: WAPA – Prognosfruit 2024

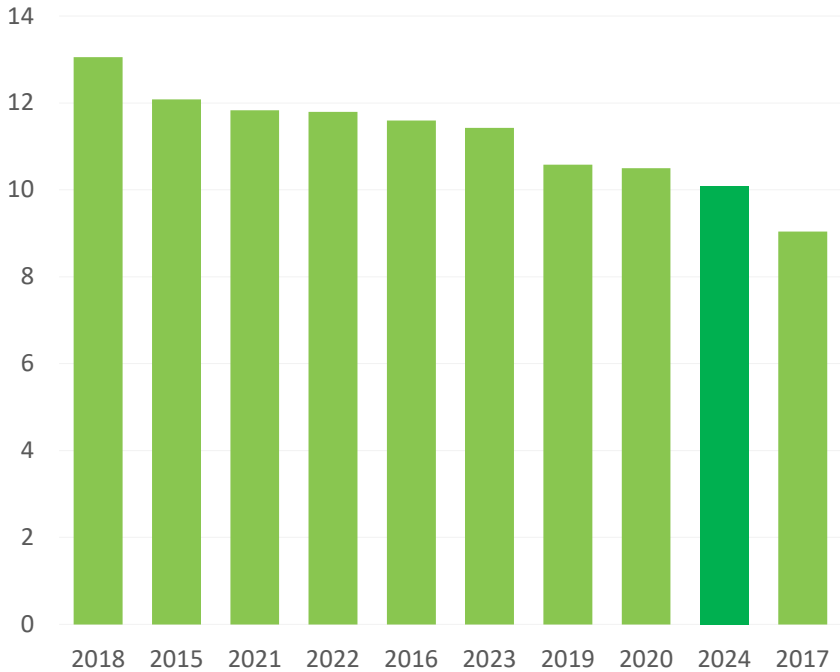
Year	Volume (million t)
2015	12,22
2016	11,73
2017	9,16
2018	13,26
2019	10,75
2020	10,65
2021	11,99
2022	11,94
2023	11,51
2024	10,21

Apple production (million t) by year



Year	Volume (million t)
2018	13,26
2015	12,22
2021	11,99
2022	11,94
2016	11,73
2023	11,51
2019	10,75
2020	10,65
2024	10,21
2017	9,16

Apple production (million t) by volume



Findings

- Second-lowest crop of the decade, strong decrease in Eastern Europe (CZ, PL, HU, RO) due to frost, poor flowering ,unstable weather and hail damages.
- Harvesting mostly 1 week/10 days earlier than last year
- Mostly average size (but smaller in FR, PL; larger in PT, BE’s Jonagold)
- Organic -12% from 2023 (535.000 t) but in line with 2018-2020. Processing -23%
- Strong competition between different market segment: fresh (local v intra v. export) and processing

Year	Volume (million t)	VAR %
9Y AVG	11,47	↓ -10,98%
5Y AVG	11,37	↓ -10,19%
3Y AVG	11,81	↓ -13,58%
2023	11,51	↓ -11,30%
2024	10,21	



EU apple forecast for the 2024/2025 season

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	YOY	3Y AVG
Austria	177	40	67	184	146	126	120	151	116	59	↓ -49,14%	↓ -54,20%
Belgium	285	234	88	231	242	168	250	239	203	133	↓ -34,30%	↓ -42,12%
Croatia	101	35	66	86	60	55	65	57	66	61	↓ -7,50%	↓ -2,71%
Czechia	156	139	102	145	103	118	110	138	101	24	↓ -76,34%	↓ -79,53%
Denmark	24	24	19	24	15	24	18	24	15	21	↑ 40,00%	↑ 10,53%
France	1.674	1.514	1.424	1.477	1.651	1.337	1.383	1.391	1.508	1.463	↓ -2,98%	↑ 2,50%
Germany	973	1.033	597	1.093	991	1.023	1.005	1.072	941	793	↓ -15,75%	↓ -21,18%
Greece	242	259	231	301	276	280	246	321	183	287	↑ 56,42%	↑ 14,76%
Hungary	522	498	530	782	452	350	520	280	550	330	↓ -40,00%	↓ -26,67%
Italy	2.280	2.272	1.704	2.264	2.096	2.124	2.053	2.113	2.175	2.162	↓ -0,56%	↑ 2,32%
Latvia	8	10	8	14	10	14	8	10	5	7	↑ 40,00%	↓ -9,81%
Lithuania	46	50	48	62	26	52	36	51	27	35	↑ 29,63%	↓ -7,89%
Netherlands	336	317	228	267	272	220	243	235	199	197	↓ -1,01%	↓ -12,64%
Poland	3.979	4.035	2.870	4.810	2.910	3.410	4.300	4.495	3.970	3.190	↓ -19,65%	↓ -25,03%
Portugal	329	263	314	267	354	278	368	291	295	300	↑ 1,87%	↓ -5,65%
Romania	465	457	340	635	493	537	594	543	531	451	↓ -15,00%	↓ -18,82%
Slovakia	40	17	15	44	35	30	31	32	27	36	↑ 32,56%	↑ 18,93%
Slovenia	71	12	6	72	36	46	44	50	47	59	↑ 26,44%	↑ 26,19%
Spain	482	495	480	476	555	425	563	412	518	567	↑ 9,36%	↑ 13,80%
Sweden	25	27	22	31	22	29	32	32	32	32	→ 0,00%	↑ 0,59%
Total	12.216	11.731	9.158	13.264	10.746	10.646	11.989	11.936	11.508	10.207	↓ -11,30%	↓ -13,58%

Findings

- Too early for a crop update but climatic conditions since Prognosfruit and smaller sizes could lead to crop lower than 10 Mio T
- France: Golden slightly up but Gala and other down, lower size leading to lower pack out for fresh. Crop – 5% (?) to forecast
- Spain: lower size to lead to lower crop in Catalunya, main production region
- CZ, AT, RO: low initial crop further impacted by Boris strom
- Germany: low crop in North , but Southern region crop might be higher
- Italy : almost stable
- Belgium stable crop and Netherlands small decreased compared to forecast
- Slovenia : production will drop due to smaller yield due to drought & heat wave

EU apple forecast for the 2024/2025 season

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	YOY	3Y AVG
Annurca	35	35	35	40	45	45	45	45	38	50	↑ 31,58%	↑ 17,19%
Boskoop	77	71	34	66	55	46	61	84	50	44	↓ -12,39%	↓ -32,47%
Braeburn	299	290	199	281	254	221	205	202	189	160	↓ -15,26%	↓ -19,46%
Cortland	26	0	0	0	0	0	0	0	0	0		
Cox	8	7	4	4	3	17	16	14	9	9	→ 0,00%	↓ -30,77%
Cripps Pink	244	261	260	276	289	273	256	319	318	309	↓ -2,74%	↑ 3,84%
Elstar	399	387	265	357	363	312	333	376	293	278	↓ -5,10%	↓ -16,69%
Fuji	337	287	290	332	316	313	306	334	307	306	↓ -0,43%	↓ -3,05%
Gala	1.325	1.255	1.225	1.413	1.387	1.390	1.534	1.463	1.519	1.351	↓ -11,07%	↓ -10,28%
Gloster	183	197	166	190	145	154	201	141	122	121	↓ -0,50%	↓ -21,79%
Golden Delicious	2.557	2.433	1.931	2.450	2.293	2.001	2.199	1.972	2.195	1.972	↓ -10,20%	↓ -7,10%
Granny Smith	406	385	363	393	373	365	347	410	338	341	↑ 0,86%	↓ -6,62%
Idared	1.153	995	651	1.214	621	659	760	669	617	503	↓ -18,40%	↓ -26,16%
Jonagold	633	567	298	581	395	315	468	405	353	276	↓ -21,82%	↓ -32,49%
Jonagored	509	528	326	563	246	250	251	208	186	119	↓ -36,16%	↓ -44,69%
Jonathan	170	145	126	198	118	118	104	121	132	108	↓ -18,78%	↓ -9,77%
Ligol	303	330	250	350	150	210	280	260	220	160	↓ -27,27%	↓ -36,84%
Lobo	31	0	0	0	0	0	0	0	0	0		
Morgendurf/imperatore	46	49	54	58	48	54	32	32	28	56	↑ 99,82%	↑ 81,74%
Pinova	119	104	85	156	141	162	195	207	207	183	↓ -11,27%	↓ -9,55%
Red Delicious	661	648	573	759	693	677	692	694	599	616	↑ 2,85%	↓ -6,91%
Red Jonaprince	103	155	113	371	407	441	471	579	470	328	↓ -30,25%	↓ -35,27%
Reinette Grise du Canada	134	109	89	148	134	136	141	151	157	178	↑ 13,22%	↑ 18,88%
Shampion	513	522	416	570	414	423	465	454	422	356	↓ -15,71%	↓ -20,37%
Spartan	4	2	2	4	2	4	4	0	0	0	↓ -94,12%	↓ -99,02%
Stayman	14	14	8	7	2	2	0	0	0	0		
Other	1.724	1.745	1.202	2.140	1.544	1.749	2.283	2.297	2.079	1.745	↓ -16,07%	↓ -21,39%
Other new varieties	203	209	192	342	307	309	340	497	658	639	↓ -2,96%	↑ 28,14%
Total	12.216	11.731	9.158	13.264	10.746	10.646	11.989	11.936	11.508	10.207	↓ -11,30%	↓ -13,58%

Findings

Golden: still largest category but below 2 Mio The lowest in the decade

Gala: second largest varieties but lower than last year peak by 10%

Cripps Pink: steady over 300.000 T

Arnucca and Morgnedurf/imperatore: at their highest of the decade

Some other traditionnal varieties : all at their lowest from a decade perspective (Granny, Braeburn, ligol, Idared , Jonathan , Jonagold group , Shampion , Gloster Elstar)

Organic production: on the decline due to lack of profitability and lack of demand



Extra-EU Northern Hemisphere 2024 forecast

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	YOY	3Y AVG
China	42.613	43.882	44.500	32.000	42.425	44.066	45.973	36.089	39.337	40.124	↑ 2,00%	↓ -0,85%
India	2.134	2.521	2.091	2.014	2.364	2.075	2.650	2.830	1.950	2.275	↑ 16,67%	↓ -8,14%
Mexico	717	714	714	660	761	714	808	809	815	820	↑ 0,62%	↑ 1,15%
Moldova	250	412	487	665	610	480	665	446	518	447	↓ -13,62%	↓ -17,66%
Russia	1.707	1.736	1.100	1.300	1.000	1.200	1.400	1.300			→ 0,00%	→ 0,00%
Serbia	356	400	400	460	500	506	516	373	469	381	↓ -18,83%	↓ -15,81%
Switzerland	140	136	96	167	131	141	122	120	88	106	↑ 20,35%	↓ -4,00%
Turkey	2.466	2.852	2.004	3.090	3.524	3.928	4.402	4.510	4.602	4.810	↑ 4,52%	↑ 6,78%
UK	243	239	207	219	205	196	155	192	150	175	↑ 16,64%	↑ 5,90%
Ukraine	1.196	1.099	1.078	1.458	1.154	1.115	1.279	1.129	1.086	1.082	↓ -0,43%	↓ -7,13%
USA	4.554	5.221	5.248	4.645	4.998	4.926	4.732	4.691	5.073	4.646	↓ -8,42%	↓ -3,85%

Eastern Europe :

- Mostly all around with low crop:Moldova, Serbia but also Russia, Belarus ...
- Eurasian Economic Area instability:
 - Kazakhstan announced their «small »crop potential to be 20% higher (> 300.000 T) to justify an import embargo by road till end of the year , except for the Eurasia Economic Area
 - On the other hand Belarus declared a new ban on re-export
 - Both measures : significantly impact supply of Russia with a very low crop

Other NH main suppliers :

- UK: closeby market still attractive with a medium to low crop
- USA: low crop with export to be primarily limited due to peak low crop in Washington State
- India : medium recovery to 2,2 Mio T while import expected to continue to increase
- Turkey : increase competition for EU in M-E, India , (SE) Asia

Apple market outlook overview

- **Supply**

- Less harvest, but different starting position for EU regions
- Overall, regions moderate lower crop could expect good season for all market outlet at good price
- Less table apples in the North and East, South on average
- Season transfer: gap in the last part of the season to be covered by Gala and late closing of Golden season
- Starting prices slightly higher than in the previous year, corrections difficult later
- Higher prices for production is necessary (at least still 10 cts missing)

- **Market**

- Lower volume for fresh market overall , but rather stable in Western part. Higher kick off prices
- Limited import of SH , no overlap. Import from candidate with a low start too this season
- EU exports with uncertainties in Eurasia, some reboot of Egypt . Good start in SE Asia & Latin America
- Demand under pressure , consumers still looking for cheaper options, organic still under pressure

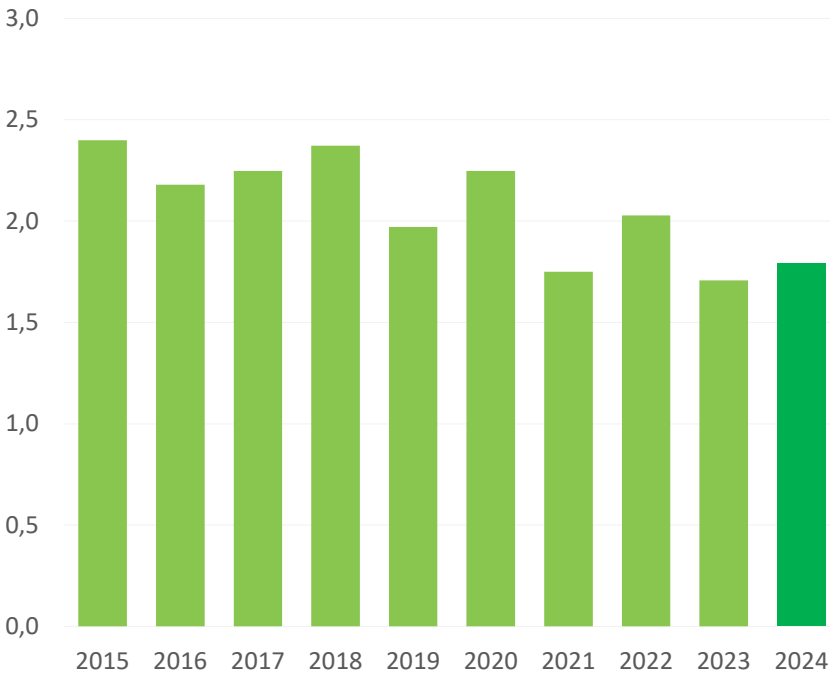
- **Processing**

- Strong demand for AJC and NFC expected, higher price level. Also supports the market for table apples
- Lower orange juice output with limited impact on AJC-NFC => limited substitution effect
- How to keep processing business attractive for producers considering decline of processing in China, USA , SH

EU pear forecast for the 2024/2025 season

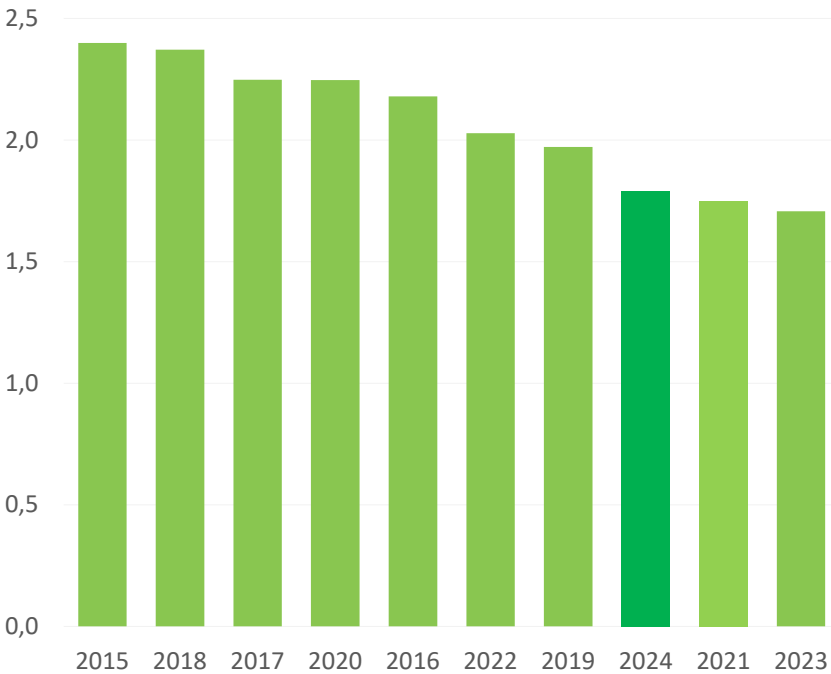
Year	Volume (million t)
2015	2,40
2016	2,18
2017	2,25
2018	2,37
2019	1,97
2020	2,25
2021	1,75
2022	2,03
2023	1,71
2024	1,79

Pear production (million t) by year



Year	Volume (million t)
2015	2,40
2018	2,37
2017	2,25
2020	2,25
2016	2,18
2022	2,03
2019	1,97
2024	1,79
2021	1,75
2023	1,71

Pear production (million t) by volume



Findings

- Third-lowest crop of the decade, slight recovery from last year led by IT but still well below the 5/10-year average
- Slight increase in acreage (100.000 HA), higher yield despite a 20% decline in the last decade
- Organic +20% from 2023 (69.830 t) but still -18% from peak of 2020. Processing +62% (253.000 t)

Year	Volume (million t)	VAR %
9Y AVG	2,10	↓ -14,75%
5Y AVG	1,94	↓ -7,74%
3Y AVG	1,83	↓ -2,07%
2023	1,71	↑ 4,90%
2024	1,79	



EU pear forecast for the 2024/2025 season

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	YOY	3Y AVG
Belgium	369	322	310	369	332	393	356	346	381	280	↓ -26,61%	↓ -22,47%
Croatia	2	1	6	4	3	2	2	2	2	3	↑ 35,00%	↑ 35,00%
Czechia	10	7	4	7	6	6	7	7	7	2	↓ -67,17%	↓ -69,42%
Denmark	6	6	5	6	4	6	6	7	7	7	→ 0,00%	↑ 5,00%
France	155	138	133	134	121	133	58	147	104	119	↑ 14,62%	↑ 15,73%
Germany	43	35	23	45	42	39	37	36	38	38	→ 0,00%	↑ 2,70%
Greece	60	47	59	60	58	80	67	99	61	84	↑ 38,12%	↑ 11,68%
Hungary	33	38	35	38	32	16	16	15	20	15	↓ -25,00%	↓ -12,28%
Italy	764	681	738	730	363	611	202	505	184	405	↑ 120,52%	↑ 36,50%
Latvia	0	0	0	0	1	1	1	1	0	0	↓ -21,47%	↓ -65,65%
Netherlands	349	374	330	402	373	400	340	352	358	327	↓ -8,66%	↓ -6,57%
Poland	80	55	40	70	70	65	70	95	100	100	→ 0,00%	↑ 13,21%
Portugal	134	113	186	142	202	139	225	132	112	124	↑ 10,12%	↓ -20,99%
Romania	43	50	46	57	48	47	50	42	42	36	↓ -15,00%	↓ -19,73%
Slovakia	1	0	1	1	1	1	1	1	1	1	↑ 37,12%	↑ 28,82%
Slovenia	4	1	0	5	1	1	1	3	1	3	↑ 363,64%	↑ 73,86%
Spain	344	311	331	298	313	307	309	236	286	244	↓ -14,82%	↓ -11,95%
Sweden	1	1	1	2	1	2	2	2	2	2	→ 0,00%	→ 0,00%
Total	2.399	2.180	2.248	2.372	1.971	2.246	1.750	2.028	1.707	1.790	↑ 4,90%	↓ -2,07%

Findings

Source: WAPA – Prognosfruit 2024

- Benelux : both NL and BE both in line with forecast but with the lowest crop of the decade
- Poland : ongoing growth. Most production in Mazovia, and not impacted this year by climatic conditions
- Italy: only a partial recovery far from potential that might never be recovered
- Spain on a low side
- Pera Rocha slight increase to last year but lower than full crop



EU pear forecast for the 2024/2025 season

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	YOY	3Y AVG
Abate F	336	298	333	322	140	250	57	176	54	125	↑131,82%	↑30,12%
Alexandrina	0	0	0	0	0	0	0	0	0	0		
Blanquilla	44	40	43	40	37	38	33	26	35	31	↓-11,40%	↓-1,72%
Conference	950	891	857	975	881	975	871	865	898	776	↓-13,54%	↓-11,59%
Coscia-Ercollini	79	67	79	70	63	73	55	78	54	75	↑38,95%	↑20,02%
Doyenne du Comice	85	80	58	80	60	71	46	60	53	37	↓-31,36%	↓-31,33%
Durondeau	5	3	2	4	3	3	2	2	2	1	↓-43,36%	↓-40,79%
Guyot	74	59	65	58	58	56	36	54	41	48	↑16,25%	↑10,16%
Kaiser	45	41	45	49	21	43	17	31	13	24	↑91,56%	↑17,81%
Passacrassana	12	11	9	10	7	8	4	4	2	13	↑424,86%	↑253,65%
Rocha	134	113	186	142	202	140	226	132	120	129	↑6,96%	↓-19,35%
William BC	294	279	274	280	208	263	150	249	169	226	↑33,77%	↑19,52%
Other	340	297	295	341	290	326	251	290	196	240	↑22,41%	↓-2,50%
Other new varieties								60	70	67	↓-3,89%	
Total	2.399	2.180	2.248	2.372	1.971	2.246	1.750	2.028	1.707	1.790	↑4,90%	↓-2,07%

Findings

Abate : partial recovery, what productive potential in the future

Conference and Doyenne: peak low of the decade

Williams: partial growth

Extra-EU Northern Hemisphere 2024 forecast

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	YOY	3Y AVG
China	17.860	19.000	19.000	14.250	17.298	17.815	18.876	16.045	17.649	19.414	↑ 10,00%	↑ 10,79%
India		88	89	86	86	88	89	88	88	75	↓ -14,77%	↓ -15,03%
Mexico	24	27	28	30	26	26	26	26	27	26	↓ -2,50%	↓ -1,23%
Moldova	4	4	6	6	6	5	6	5	6	5	↓ -13,60%	↓ -11,55%
Russia	46	46	29	45	45	25	28	20				↓ -100,00%
Serbia	44	45	45	52	53	55	49	55	52	55	↑ 5,77%	↑ 5,77%
Switzerland	23	23	12	26	24	24	17	18	13	14	↑ 8,47%	↓ -11,11%
Turkey	390	415	455	485	522	525	522	540	534	569	↑ 6,55%	↑ 6,95%
UK	25	24	23	23	20	17	15	15	18	18	↑ 4,42%	↑ 16,39%
Ukraine	171	156	165	183	155	151	175	157	151	151	↓ -0,43%	↓ -6,48%

Findings

China over 19 Mio T and Turkey continuing its growth



Pear market outlook overview

- **Supply**

- If production in Italy continues to fall, shippers MS countries can focus more on the EU domestic market
- More Abate Fetel than last year, but below average – a chance for rising club varieties
- Need the Eastern European market to stabilize the market but growth could lead to fewer Dutch and Belgian exports to the East in the future(?)
- Less expected to come from overseas creating more opportunities for European pears in spring

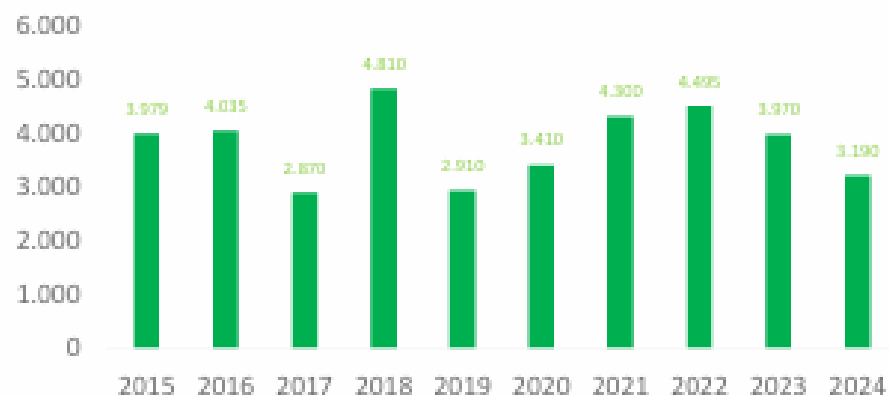
- **Consumption/Pricing**

- Starting prices for the new season below the previous year's level, perhaps new price impulses from spring

Poland	Apple production (1.000 t)
By variety	
Source	TRSK
F2024 production (1.000 t)	3.190



Total production (1.000 t)



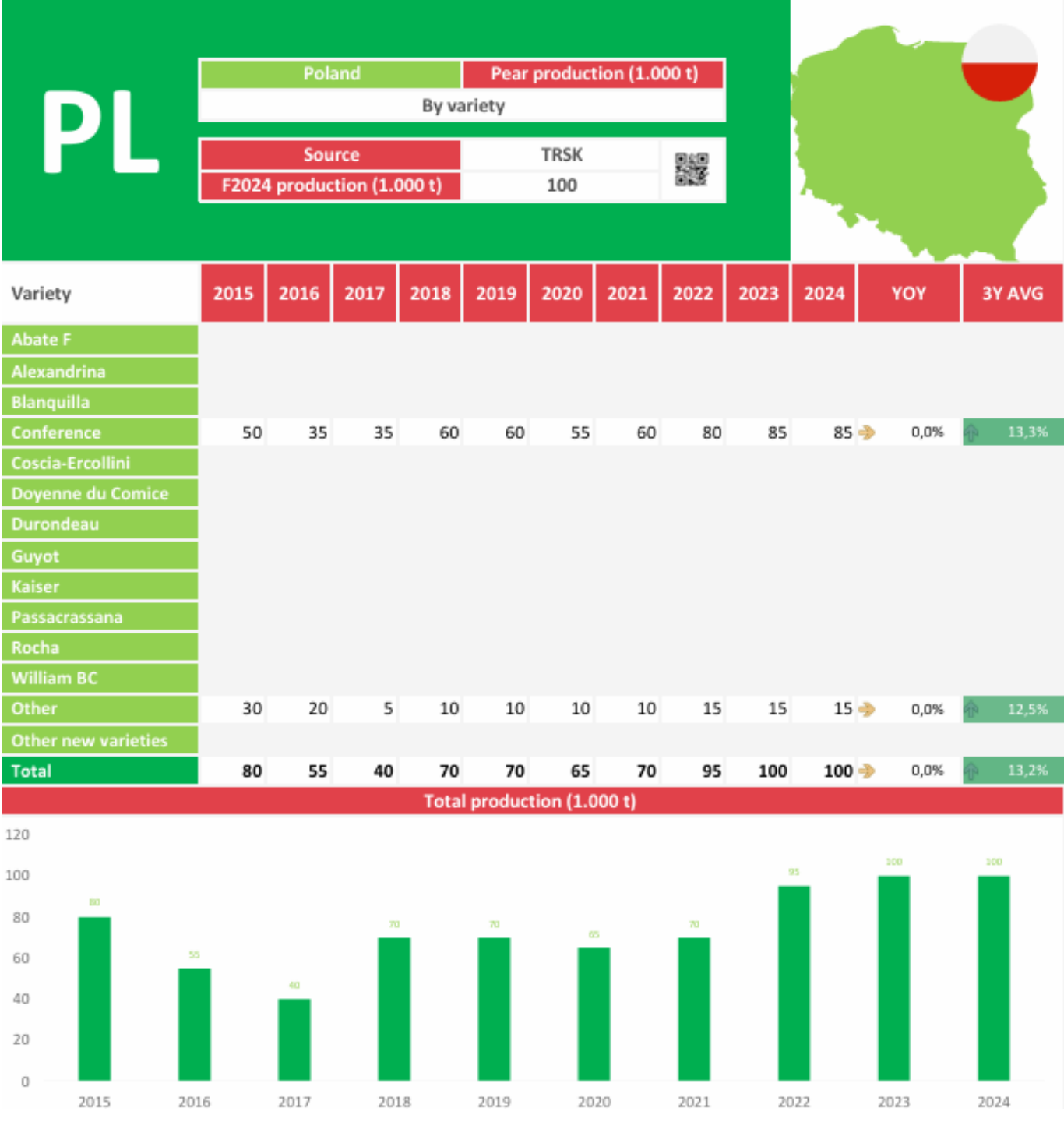
- Mild winter and early spring
- Flowering 2 weeks earlier,
- Frost and bad weather during flowering, especially in east and west regions, central Poland remained good
- Dry second half of spring and summer
- Picking time 14 days earlier
- Hot weather end of August
- Bad impact to quality of apples
- A lot of apples over ripe and poor storability

Variety APPLES

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	YOY	3Y AVG
Annurca												
Boskoop								25				-100,0%
Braeburn												
Cortland	26											
Cox												
Cripps Pink												
Elstar	26	20	10									
Fuji												
Gala	324	340	320	360	250	290	340	390	400	350	↓ -12,5%	↓ -7,1%
Gloster	167	180	160	180	140	150	200	140	120	120	→ 0,0%	↓ -21,7%
Golden Delicious	366	360	320	380	270	320	360	420	440	370	↓ -15,9%	↓ -9,0%
Granny Smith												
Idared	784	700	400	800	350	410	460	430	370	320	↓ -13,5%	↓ -23,8%
Jonagold	132	130	70	130	40	50	50	50	40	30	↓ -25,0%	↓ -35,7%
Jonagored	336	350	250	400	100	110	110	110	90	60	↓ -33,3%	↓ -41,9%
Jonathan												
Ligol	303	330	250	350	150	210	280	260	220	160	↓ -27,3%	↓ -36,8%
Lobo	31											
Morgendurff/imperatore												
Pinova	42	35	30	60	40	55	90	100	100	90	↓ -10,0%	↓ -6,9%
Red Delicious	10	20	10	40	70	75	110	120	100	80	↓ -20,0%	↓ -27,3%
Red Jonaprince	42	70	50	260	300	330	350	470	370	260	↓ -29,7%	↓ -34,5%
Reinette Grise du Canada												
Shampion	491	500	400	550	400	410	450	440	410	350	↓ -14,6%	↓ -19,2%
Spartan												
Stayman												
Other	899	1.000	600	1.300	800	1.000	1.500	1.540	1.310	1.000	↓ -23,7%	↓ -31,0%
Other new varieties												
Total	3.979	4.035	2.870	4.810	2.910	3.410	4.300	4.495	3.970	3.190	↓ -19,6%	↓ -25,0%

Poland – pears

- Early start after mild winter
- Flowering just before cold period
- Most of orchard with good crop
- Year by year bigger Surface of new orchards



Promoting Polish apples



GARDEN OF EUROPE
in Quality we Trust

Many thanks