European Commission

Agriculture and rural development

SHORT-TERM OUTLOOK for EU agricultural markets in 2025

August 2025

APPLES

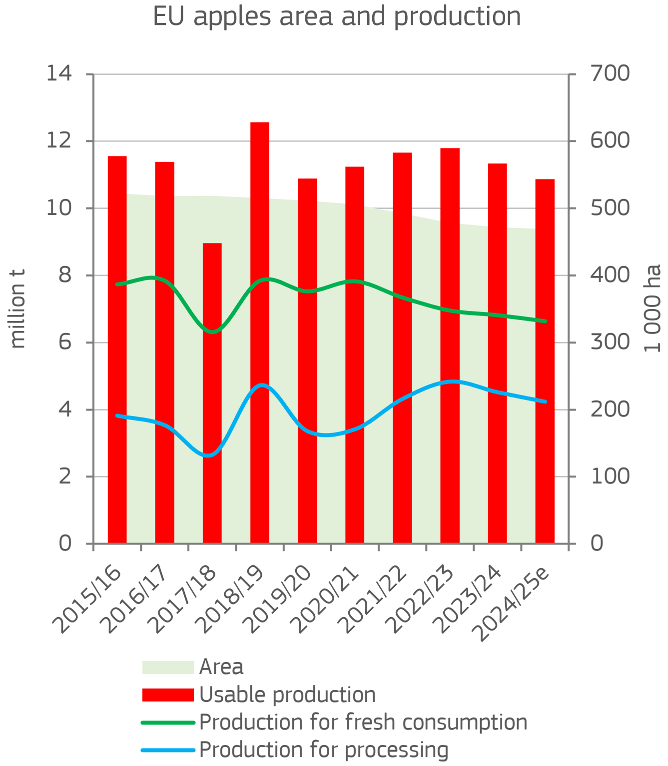
EU CONSUMPTION OF FRESH APPLES HOLDS UP

The 2024/25 EU production of apples is estimated to decrease by 4% to 10.9 million t (-5% compared to the 5-year average) and to reach the lowest level since 2017/18. The decline is due to adverse weather conditions, notably in PL (-13% year-on-year), which accounts for around one third of total EU production. Other countries also experienced significant production declines with CZ (-63%) being the most affected.

Due to the general decrease in availability, and fresh consumption relatively stable at 6.7 million t (-3% year-on-year), less apples are directed to processing. As a result, the EU apple production for processing is experiencing a higher decline. In total, 4.2 million t of apples are expected to go for processing (-6% year-on-year).

The lower availability keeps the EU producer prices high; however seasonality is expected to play a positive role in the demand. Regarding fresh apples, apparent EU per capita consumption is expected to remain stable at 13.4 kg, (+1% year-on-year), while per capita consumption of processed apples is expected to increase stronger (+8%) to 10.8 kg.

As a result of lower production and stable consumption, stocks of fresh apples are expected to be almost fully used by the end of the 2024/25, dropping to around 0.3 million t.



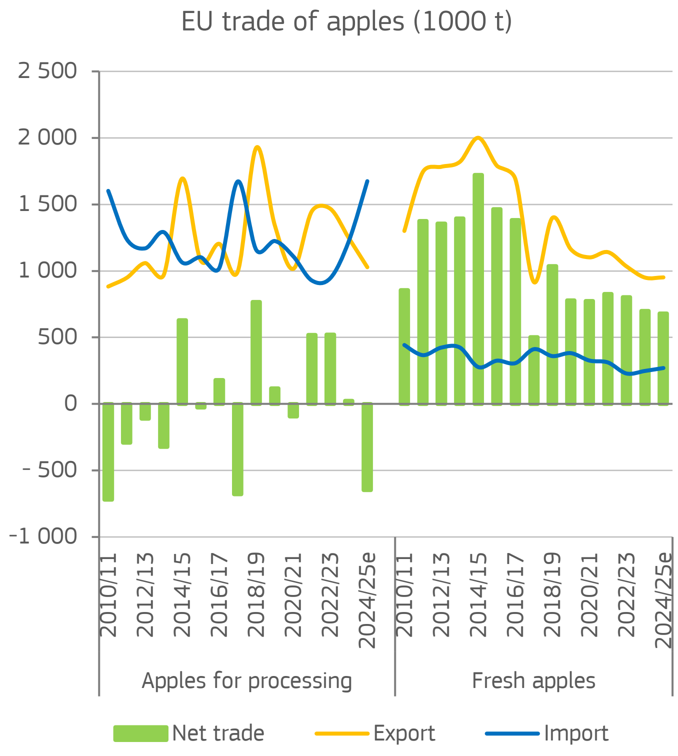
Source: DG Agriculture and Rural Development, based on Eurostat.

IMPORTS OF PROCESSED APPLES MATCH EXPORTS OF FRESH APPLES

EU exports of fresh apples are expected to remain stable in 2024/25, but significantly below the 5-year average (-13%). Driven by the decline of production, imports of fresh apples are expected to increase by 9%. Nevertheless, they would remain relatively small (270 000 t) and below the 5-year average (-8.5%).

Due to sizeable decline in availability for processing, EU exports of processed apples are estimated to decline sharply by 18% (-24% compared to the 5-year average). On the other hand, imports of processed apples are expected to increase significantly (+37% year-on-year, 53% above 5-year average.

As a result of these developments, EU net exports of fresh apples are expected to decline slightly to 680 000 t. At the same time, trade in processed apples is expected to go from small net export position in 2023/24 to a substantial net import of 650 000 t in 2024/25. Therefore, EU trade in apples in 2024/25 could be almost in balance for the first time since 2017/18.



Source: DG Agriculture and Rural Development, based on Eurostat.

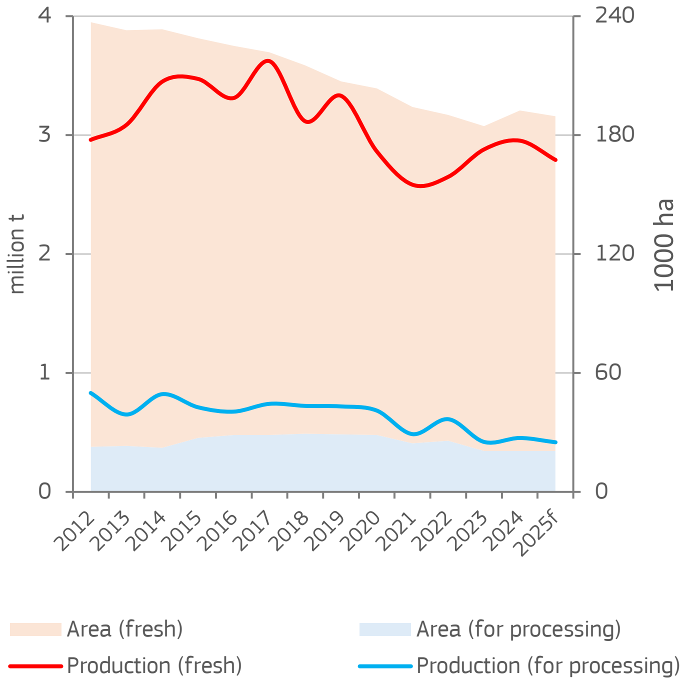
PEACHES AND NECTARINES

LOWER AREA AND REDUCED YIELDS DRIVING EU PRODUCTION DOWN

In 2025, the EU production of peaches and nectarines (P&N) is expected to moderately decline by 5.8% to 3.2 million t. This reduction is largely driven by EL, which has been notably impacted by adverse weather conditions. However, while volumes have diminished, the quality of taste and texture of the fruit is likely to remain high.

The decline in production – a combined effect of lower area and reduced yields – is expected to affect both P&N for fresh consumption (-5.5%) and for processing (-8.0%), with the latter more affected due to new fruit disease issues in EL, the largest EU producer of P&N for processing.

Generally, the EU production is experiencing the effects of climate change, with milder winters. As a result, fruit trees do not accumulate enough chill hours which are vital for their growth and fruit production. Other factors include new diseases, labour shortage, hydric conditions as well as anomalous rainfall patterns.



Source: DG Agriculture and Rural Development, based on Eurostat.

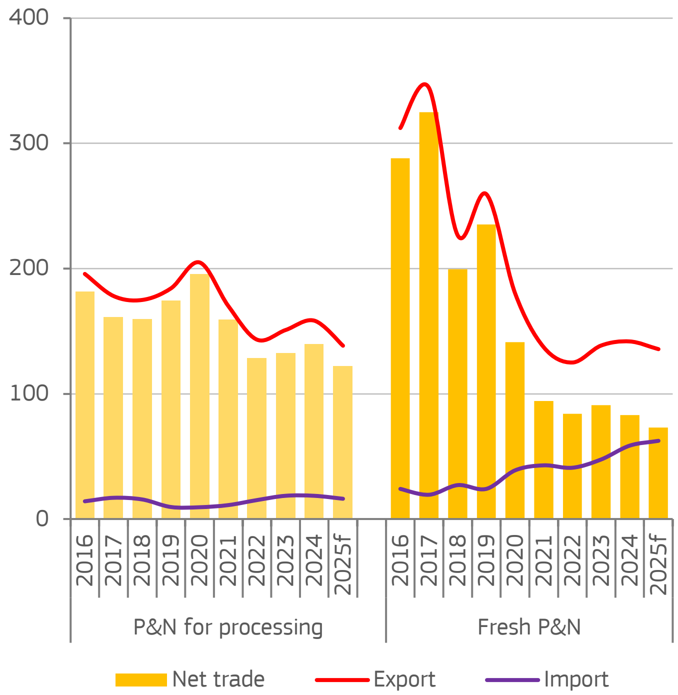
EU IMPORTS OF FRESH PEACHED AND NECTARINES TO HIT A NEW RECORD

The EU demand for fresh P&N is expected to decline, along with a lower production. Nevertheless, the quality of the fruit should serve as a key factor in sustaining consumer interest and preference. Another key factor is the summer weather as consumption of P&N is positively linked to warm and sunny weather conditions.

In terms of apparent per capita consumption, fresh peaches and nectarines are projected to remain close to the 5-year average (6.0 kg). At the same time per capita consumption of P&N for processing is expected at 0.7 kg per capita, in line with the recent declining trend.

Counter-seasonal imports from regions such as Chile and South Africa could play a significant role in maintaining supply levels, and ensuring the availability of these products to consumers. EU imports could grow to reach a new record of 62 000 t.

EU exports of fresh P&N are forecast to fall by 4.4%, a change primarily attributed to lower yields and delays at the start of the harvest season. For trade in processed P&N, both exports and imports are forecast to decline by about 13%. These reductions reflect broader market adjustments in response to decreased processing capacities and evolving consumer demand.



Source: DG Agriculture and Rural Development, based on Eurostat.

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