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**Report Highlights:**

In MY 2023/24, EU production of peaches and nectarines is estimated to amount to 3.6 million MT while cherry production is anticipated to amount to 657,435 MT. Unfavorable growing conditions in main producing Member States support the reduction in cherry production, while in peaches and nectarines, improved production levels in Spain offset poor performance registered in Italy. EU fresh stone fruit consumption has come under pressure due to the high inflation rate derived from the conflict in Ukraine.

**Disclaimer:** This report presents the situation and outlook for stone fruit including peaches, nectarines, and cherries in the EU. The report presents the views of the authors and does not reflect the official view of the U.S. Department of Agriculture (USDA). The data are not official USDA data.

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**Harmonized System (HS) Codes:**

Peaches and nectarines HS Code 080930  
Cherries HS Code 080921, 080929

**Marketing year:**

Peaches and nectarines January/December  
Cherries April/March

**Abbreviations and definitions used in this report:**

CAP Common Agricultural Policy  
CMO Common Market Organization  
EC European Commission  
EU European Union  
€ Euro  
FAS Foreign Agricultural Service  
HA Hectares  
TDM Trade Data Monitor, LLC  
MY Marketing year  
MS EU Member State  
MT Metric ton (1,000 kg)  
MMT Million Metric Tons  
PS&D Production, Supply and Distribution  
ROW Rest of the World  
UK United Kingdom  
U.S. United States  
\$ U.S. Dollar

**Note:** The European Union Member States (MS) are mandated to annually provide the EU Commission with data concerning the “production area” of permanent crops. This means “the area that can potentially be harvested in the reference harvest year. It excludes all non-producing areas, such as new plantations that have not yet started to produce” (Regulation (EC) No 543/2009 of the European

Parliament and of the Council of 18 June 2009, Article 2 (f)). In this report, this corresponds to the line “Planted Area.” Not all MS publish harvested data. Hence, in this report, the line “Area Harvested” is a FAS Post estimate.

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## Executive Summary

The main EU producers of peaches and nectarines are Spain, Italy, Greece, and France. In MY (January/December) 2023/24, EU production of peaches and nectarines is estimated to rise 12 percent compared to the previous season to 3.6 million MT (MMT). This estimated growth is mainly because of the significant expected increase in Spain, the major stone fruit producer in the EU. However, Spain's stone fruit harvest in 2023 will depend on water availability in a context of severe drought after a very dry winter and spring. EU area planted is expected to decline 0.5 percent to around 196,000 HA, following a significant decrease in last years, mainly in Spain and Italy. Regarding cherries, the main EU cherry producers are Poland, Spain, Italy, and Greece. Total EU cherry production in MY (April/March) 2023/24 is projected to decline 21 percent to 657,435 MT due to the expected decline in the major producing countries due to unfavorable weather conditions. Additionally, total EU cherry planted area will remain flat at around 165,000 HA.

EU stone fruit producers, and the overall fruit sector, is concerned about the significant increase in EU regulations and requirements namely in plant health, environment, and packaging which have a direct impact on production costs. Additionally, higher agricultural inputs costs and an agricultural labor deficit remain a concern for stone fruit producers across the EU.

The EU is self-sufficient in peaches and nectarines, which are mostly consumed fresh. In MY 2023/24, consumption of peaches and nectarines in the EU is expected to grow given the larger EU supply, specifically in fruit for processing. Conversely, EU cherry consumption is expected to drop due to the shortage of EU cherry production. According to [Freshfel Europe](#), fresh fruit consumption has come under pressure due to the economic crisis and the high inflation rate derived from the conflict in Ukraine that reduced purchase power.

Regarding trade, a large amount of intra-EU stone fruit trade exists from main producing Member States. The EU is a net exporter of peaches and nectarines, mainly from Spain. However, the EU's positive trade balance for these products continues to reduce due to a rise in imports mainly from [Turkey](#). Higher Spanish crop is projected to drive EU exports up in MY 2023/24. Conversely, the EU is a net importer of cherries also sourced mostly from Turkey. In MY 2023/24, EU cherry imports may rise due to the decline in production.

## Fresh Peaches & Nectarines

**Table 1. Production, Supply, and Distribution Data Statistics**

Peaches & Nectarines, Fresh Market Year Begins	2021/2022		2022/2023		2023/2024	
	Jan 2021		Jan 2022		Jan 2023	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	201,413	201,113	201,260	197,087		195,953
Area Harvested (HA)	182,843	185,436	186,315	182,341		181,434
Bearing Trees (1000 TREES)						
Non-Bearing Trees (1000 TREES)						
Total Trees (1000 TREES)						
Commercial Production (MT)	2,848,533	2,878,094	3,091,066	3,220,959		3,617,061
Non-Comm. Production (MT)	26,976	29,072	29,275	32,535		36,536
Production (MT)	2,875,509	2,907,166	3,120,341	3,253,494		3,653,597
Imports (MT)	42,890	42,911	47,000	41,002		40,000
Total Supply (MT)	2,918,399	2,950,077	3,167,341	3,294,496		3,693,597
Domestic Consumption (MT)	2,776,165	2,812,895	3,040,341	3,169,481		3,513,597
Exports (MT)	137,234	137,182	125,000	125,015		180,000
Withdrawal From Market (MT)	5,000		2,000			
Total Distribution (MT)	2,918,399	2,950,077	3,167,341	3,294,496		3,693,597
(HA), (1000 TREES) ,(MT)						

Source: FAS EU offices.

Note: The values of “For Processing” have been added to the attribute “Domestic Consumption”

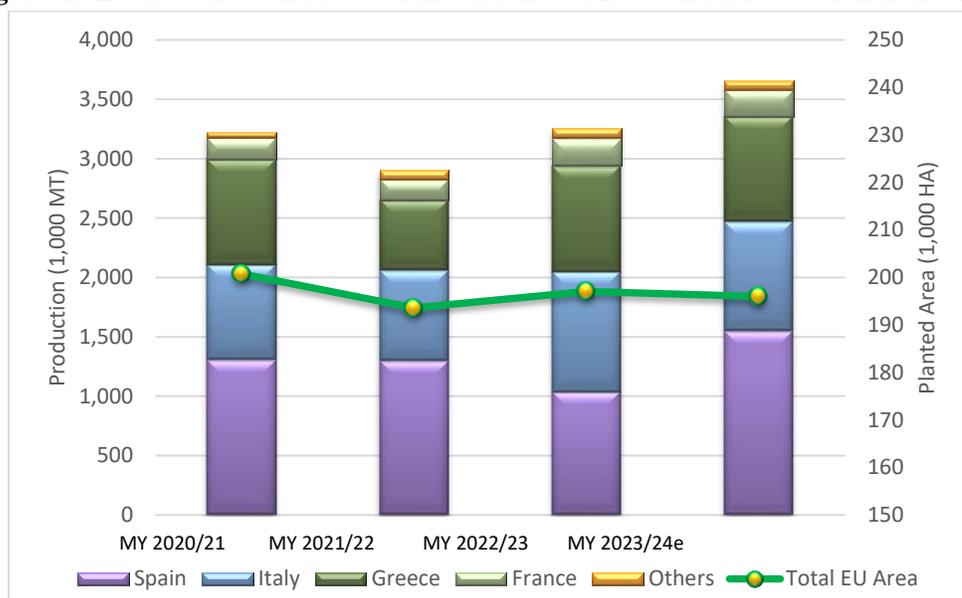
In order of importance, the main EU producers of peaches and nectarines are Spain, Italy, Greece, and France. There is also limited production in other EU MS, including Hungary, Portugal, Bulgaria, and Poland. Spain is the biggest producer and exporter of peaches and nectarines due to its early season harvest and yielding varieties. France and Italy are the major importers while Greece is the EU’s leading peach processor.

Note: For data from Greece, the volume of ‘Withdrawal From Market’ has been included in ‘Domestic Consumption.’ This attribute does not follow a consistent number for the majority of MS.

### Area and Production

In MY 2022/23 (January/December), the EU area planted for peaches and nectarines was around 197,000 hectares (HA), in line with [Eurostat data](#). For the last years, Spain and Italy decreased their area planted due to a surplus of peach production that put downward pressure on market price and resulted in poor economic conditions for farmers. This situation seems to be stabilized and planted area may decline only 0.5 percent in MY 2023/24, compared to the previous season and according to FAS Post projections. In Spain, there has been a shift in production toward tree nuts, particularly almonds. In addition, productivity gains for peaches and nectarines have been achieved with the introduction of new and higher yielding varieties that bring more diversity in the types of fruit and in harvest dates.

**Figure 1. EU Peaches and Nectarines Planted Area and Production 2020-2023**



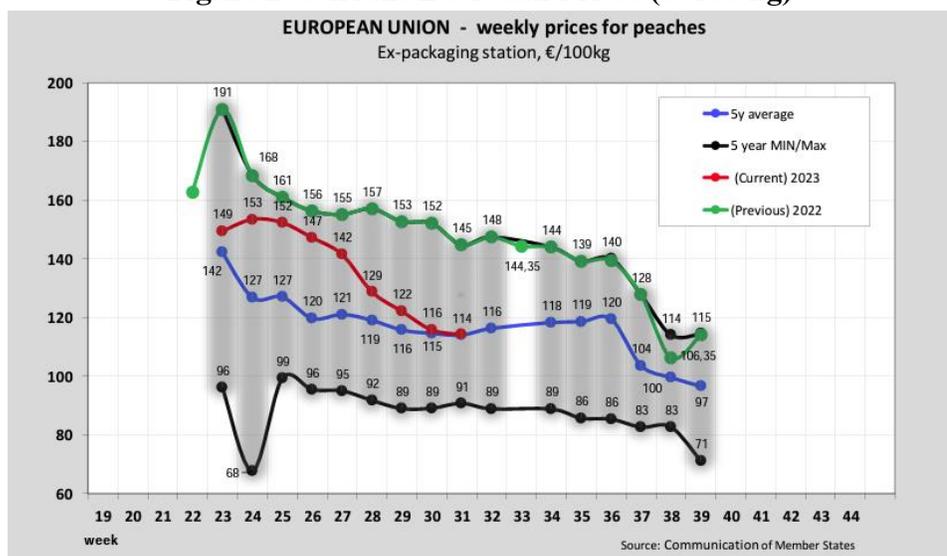
Source: FAS EU Posts estimates based on Member States statistical sources.

In MY 2022/23 (January/December), the EU area planted for peaches and nectarines was around 197,000 hectares (HA), in line with [Eurostat data](#). For the last years, Spain and Italy decreased their area planted due to a surplus of peach production that put downward pressure on market price and resulted in poor economic conditions for farmers. This situation seems to be stabilized and planted area may decline only 0.5 percent in MY 2023/24, compared to the previous season and according to FAS Post projections. In Spain, there has been a shift in production toward tree nuts, particularly almonds. In addition, productivity gains for peaches and nectarines have been achieved with the introduction of new and higher yielding varieties that bring more diversity in the types of fruit and in harvest dates.

In MY 2023/24, EU production of all type of peaches and nectarines is estimated to rise 12 percent compared to the previous season (see [EU Stone Fruit Annual 2022](#)) and amount to 3.6 million MT (MMT). Significant declines expected in production levels in most of the EU peach and nectarine producers are forecast to be compensated by the strong increase in Spain, the largest EU producer, where production is anticipated to rise by almost 50 percent. However, according to Spanish agricultural cooperatives, in 2023 Spain’s stone fruit harvest will depend on water availability throughout the summer in a context of severe drought after a very dry winter and spring.

According to [EU Peaches and Nectarines Dashboard](#), the 2022 season for peaches stood at significantly higher price levels than the five-year average (see Figure 2). In 2023, EU peach and nectarine prices remain lower than the previous season driven by the large crop in Spain. In week 31 of 2023, EU peach and nectarine prices stood at 114 €/100kg, which is similar to the last five-year average but 21 percent lower than the same period last year.

**Figure 2. Current EU Peach Prices (€/ 100 kg)**



Source: EU Peaches and Nectarines Dashboard

A major concern of EU stone fruit producers is that the fruit sector is subject to a significant increase in regulations and requirements namely in plant health, environment, and packaging which have a direct impact on production costs affecting the sector’s economy.

Spain is the largest peach and nectarine producer in the EU. Larger planted area and production growth in Spain’s most important peach and nectarine regions of Aragon, Catalonia, and Murcia, as well as increases in Extremadura, Andalusia, and Valencia, were the main factors contributing to the expansion in overall Spanish production. During the last decade, a vast varietal renewal took place and Spain planted newer varieties with more intense flavors and color. However, an excess domestic supply of peaches and nectarines put downward pressure on the market price; hence, for the last five years, the Spanish peach and nectarine sector decreased its planted area by 14 percent to around 72,000 HA in 2022. In addition, according to Spanish sources, the main goal of Spanish peach and nectarine producers is to introduce varieties adapted to the market demands but also to the new climate conditions.

Spain’s production contributes to around 40 percent of the total EU peach and nectarine production and benefits from climate conditions that allow it to produce and market early season varieties. Based on the latest Spanish agricultural cooperatives’ estimates in May 2023, Spanish peaches and nectarines production for MY 2023/24 is projected to rise almost 50 percent compared to 2022 to 1.5 MMT, rebounding to average production levels. However, due to the strong rainfalls occurred in May and June 2023 this forecast may be revised down. Initially, the [official data](#) estimates significant recovery compared to the previous season in the main producing regions, Catalonia and Aragon, and overall Spain. Also, in 2023, due to weather conditions, drought, and the lack of water, a large amount of smaller size fruit is expected to end in processing industries. However, sugar content and fruit quality is very good. In 2022, Spain’s production barely reached 900,000 MT, the lowest record in the last decade. The significant drop was due to the reduction of planted area and unfavorable weather conditions. The

cold and intense frosts affected the Ebro Valley producing regions (Aragon and Catalonia) in the months of May and April 2022. Additionally, producing areas in the Mediterranean coast (Murcia and Community of Valencia) were also negatively affected by the excessive rainfall in May.

Italy is the second leading EU peach and nectarine producer. Campania, Emilia-Romagna, Sicilia, Piemonte, and Puglia are the main producing regions. According to the national Service Center of Fruit and Horticultural Companies (CSO), Italy's MY 2023/24 peach and nectarine production is forecast at approximately 925,000 MT, a nine percent decrease from the previous season, but 30 percent below the 2015-19 average. This is mainly due to the decreasing planted area and the spring frost that affected yields in Northern Italy.

Greece is the third largest producer of peaches and nectarines in the EU. According to industry estimates, there are approximately 45,000 hectares currently cultivated for peaches and nectarines. The main producing areas include Imathia, Pella, Pieria, Kozani in northern Greece, and the area of Larissa, in Central Greece. Greece's MY 2023/24 peach and nectarine production is forecasted to remain flat compared to previous season at approximately 880,000 MT. In May 2023, a hailstorm in northern Greece reduced peach and nectarine yields.

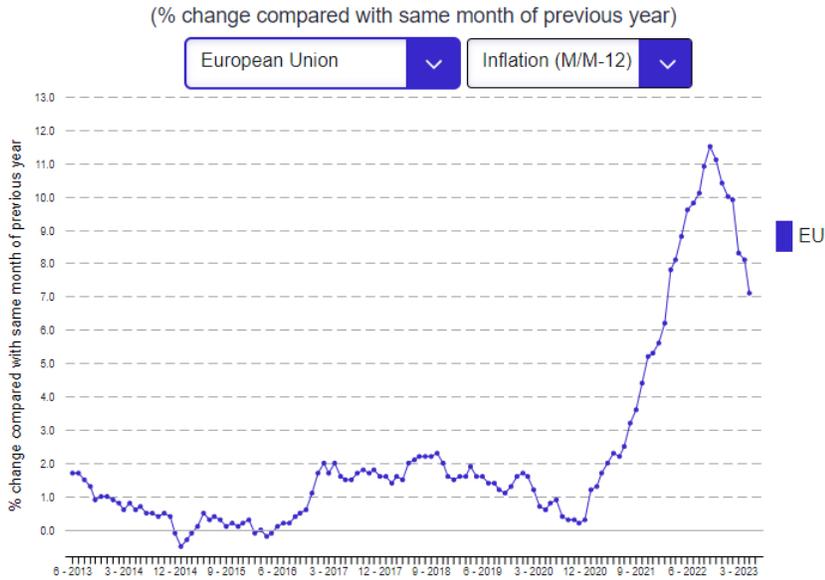
In France, the peach and nectarine crop in MY 2023/24 is expected to remain flat from 2022. Late March/Early April frosts were limited and impacted some orchards. As for other spring fruits, good and dry weather throughout the spring limited diseases and pest infestations. Peaches and nectarines orchards continued to slowly decline due to poor economic conditions for producers in recent years combined with losses of trees due to the Sharka disease.

Unfavorable weather conditions with frost and heavy rains during the 2023 spring season may also result in strong drops of MY 2023/24 peach and nectarine productions in Bulgaria, Hungary and in Poland. In Portugal, heat and drought conditions did not affect the peach orchards, presenting a normal vegetative development with productivity forecast close to normal values.

## **Consumption**

The EU is self-sufficient in peaches and nectarines, which are mostly consumed fresh. In MY 2023/24, consumption of peaches and nectarines in the EU is projected to expand given the larger EU domestic supply and the increase of tourism activity across the EU. However, after a rebound in EU fresh fruit consumption due to health reasons during the COVID-19 pandemic, fruit consumption has come under pressure due to the economic crisis. The EU's high inflation rate derived from the conflict in Ukraine reduced purchase power (Figure 3), and overall fresh fruit consumption in the EU experienced a decline in 2022 and the beginning of 2023, according to [Freshfel Europe](#). Likewise, a larger quantity of peaches and nectarines is expected to be used for processing, mainly in Spain and Greece, the major fruit processing producers, in line with the larger production but also the expected reduction in Spanish fruit size.

**Figure 3. EU Harmonized Index of Consumer Prices Inflation (M/M-12)**

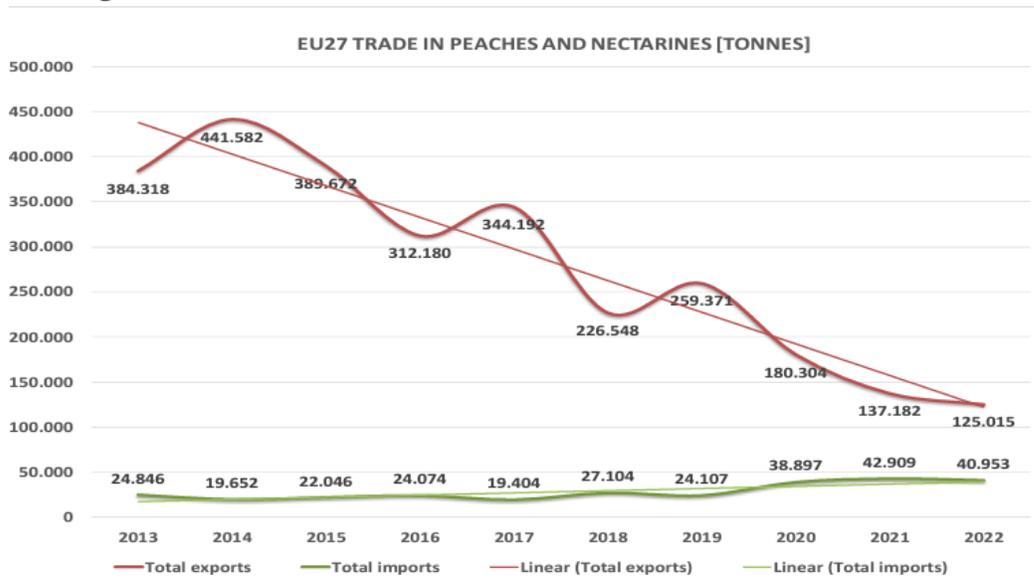


Source: [Eurostat](#)

## Trade

The EU is a net exporter of peaches and nectarines with exports largely exceeding imports. However, the EU's positive trade balance for these products continues to decrease due to a decline in exports and rise in imports (Figure 4).

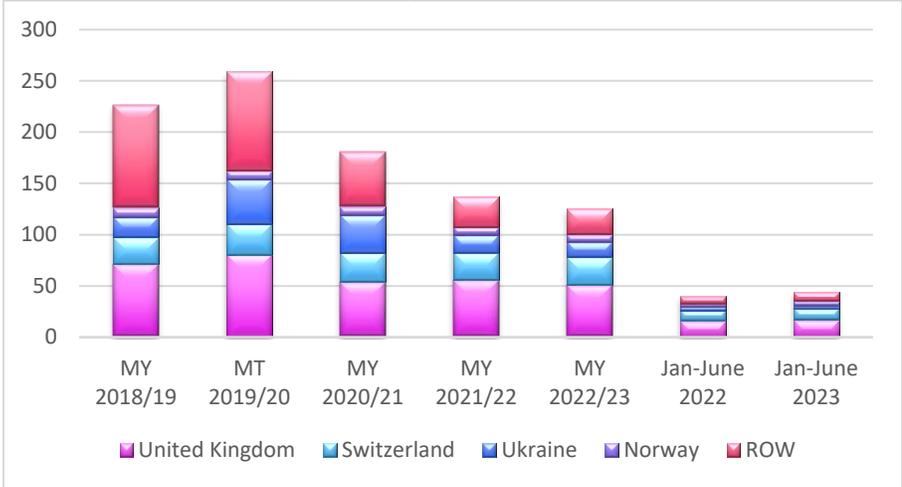
**Figure 4. EU Peaches & Nectarines Trade Data 2013-2022 (in Tons)**



Source: EU Peaches and Nectarines Dashboard

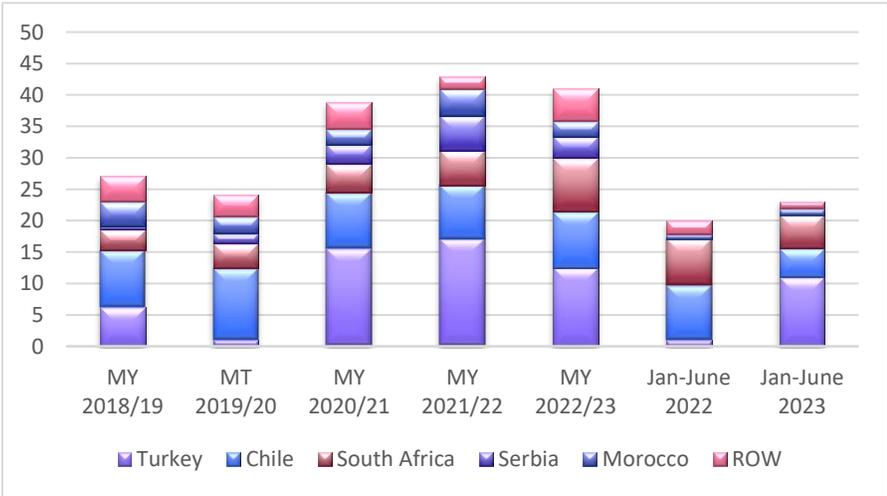
According to Trade Data Monitor (TDM), in 2022, EU peach and nectarine trade balance in value term amounted \$149 million and 84,000 MT, 11 percent lower than the previous season. Spain is the EU leading exporter of peaches and nectarines and the major fruit supplier to the rest of EU Member States. In MY 2022/23, the EU exported 125,015 tons of peaches and nectarines valued at \$216 million. In MY 2023/24 EU exports are expected to rise given the higher production projected for Spain. The United Kingdom, followed by Switzerland, Ukraine, Norway, and Belarus are the EU’s main destinations for peaches and nectarines (Figure 5).

**Figure 5. EU Exports of Fresh Peaches & Nectarines by Destination (1,000 MT)**



Source: Trade Data Monitor LLC.

**Figure 6. EU Imports of Fresh Peaches & Nectarines by Origin and (1,000 MT)**



Source: Trade Data Monitor LLC

EU peaches and nectarines imports experienced an upward trend for the last years and amounted to 41,000 MT in MY 2022/23. The main origin of EU imports of peaches and nectarines include other Northern Hemisphere suppliers, such as Turkey, Morocco, and Serbia. Imports from Chile or South Africa mainly occur during the EU’s off-season (Figure 6). Additionally, the EU peaches and nectarines imports are covered to a large extent by intra-EU trade, mainly from Spain. During the first half of 2023, Spain’s peaches and nectarines exports to the EU were reduced by seven percent despite the higher domestic supply and replaced by an 18 percent EU import growth from non-EU countries, mainly from Turkey. Due to the expected rise in production, EU imports of peaches and nectarines are expected to decline in MY 2023/24.

## Fresh Cherries (Sweet and Sour)

**Table 2. Production, Supply, and Distribution Data Statistics**

Cherries (Sweet&Sour), Fresh Market Year Begins	2021/2022		2022/2023		2023/2024	
	Apr 2021		Apr 2022		Apr 2023	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	164,340	165,085	164,324	165,381		165.286
Area Harvested (HA)	155,928	155,774	155,731	157,596		153.756
Bearing Trees (1000 TREES)						
Non-Bearing Trees (1000 TREES)						
Total Trees (1000 TREES)						
Commercial Production (MT)	667,045	726,408	726,550	830,996		657,435
Non-Comm. Production (MT)						
Production (MT)	667,045	726,408	726,550	830,996		657,435
Imports (MT)	44,205	44,204	53,000	29,006		40.000
Total Supply (MT)	711,250	770,612	779,550	860,062		697,435
Domestic Consumption (MT)	691,979	751,341	764,550	843,662		682,435
Exports (MT)	19,271	19,271	15,000	16,400		15.000
Withdrawal From Market (MT)						
Total Distribution (MT)	711,250	770,612	779,550	860,062		697,435
(HA) ,(1000 TREES) ,(MT)						

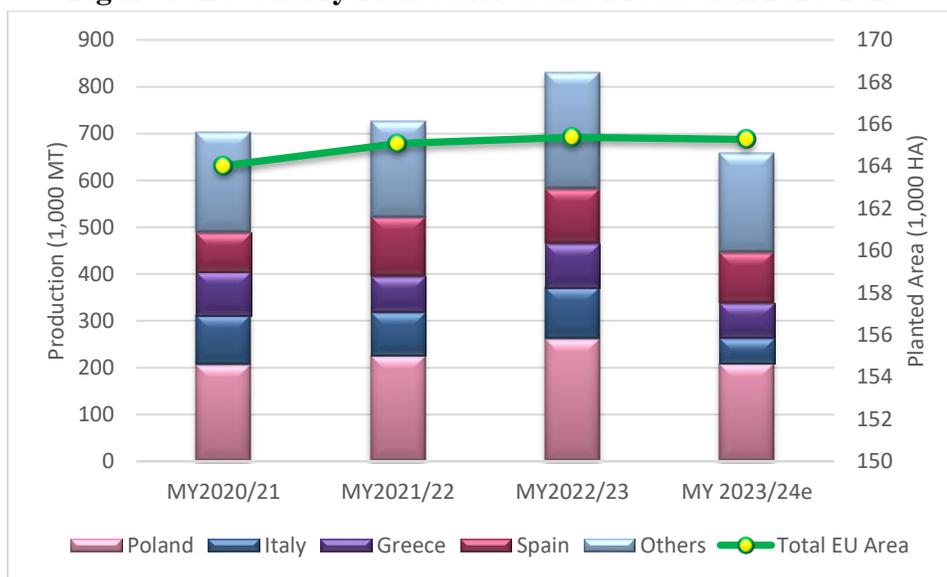
Note: The values of “For Processing” have been added to the attribute “Domestic Consumption”

Source: FAS offices

## Area and Production

The main EU cherry producers are Poland, Spain, Italy, and Greece followed by Hungary, Bulgaria, and Germany. There is also limited production in other EU Member States, such as France and Portugal and some Eastern EU Member States. Poland is the EU’s largest cherry processor, while Spain and Greece are the major exporters, namely to the EU due to their early harvest season, and Germany is the biggest EU importer. Italy and Spain are the largest consumers of fresh cherries.

**Figure 7. EU Cherry Planted Area and Production 2020-2023**



Source: FAS EU Posts estimates based on Member States statistical sources.

Total cherry production in MY (April/March) 2023/24 is projected to decline 21 percent to 657,435MT due to the expected decline in the major producing countries, namely in Poland and Italy. Unfavorable weather conditions with frost and heavy rainstorms during the spring season affecting flowering and fruit setting account for the drop in production in most of EU producing regions. According to FAS projections, in MY 2023/24 the estimated total EU cherry planted area will remain flat at around 165,000 HA.

Poland's MY 2023/24 sweet and sour cherries production is forecasted 20 percent lower than last year to 208,000 MT, with the area production unchanged at 35,000 HA. In the first quarter of 2023, rainfall contributed to good, and in places even excessive, moisture in the topsoil. A very cold spring and frosts in March and the first half of April inhibited the flowering of trees.

Spain is steadily increasing planted area, especially in Aragon, totaling around 29,400 HA. The main cherry producing areas include Aragon and Extremadura, with 35 and 25 percent of the country's total. According to official estimates, Spanish cherry production for MY 2023/24 is projected at 109,000 MT, seven percent lower than the previous season due to damage from heavy rains that took place in a large part of the producing regions in May and June 2023, especially significant in the Jerte Valley, Extremadura.

Italy's MY 2023/24 cherry production is preliminarily forecast to drop by almost 50 percent, mainly due to persistent rainfall from flowering to ripening that caused significant fruit cracking. However, quality is expected to be good. Puglia, Campania, Veneto, Lazio, and Emilia-Romagna are the leading producing areas. Furthermore, new orchards are entering production in Puglia, Trentino, and Alto-Adige.

Greece's MY 2023/24 (April/March) cherry production is forecast to decrease by approximately 20 percent compared to the previous year due to heavy rains during harvest. Fruit quality is expected to be good. Pella, Imathia, Kozani (Northern Greece), and Larissa, Lamia (Central Greece) are the leading producing areas.

Cherry production in Hungary, which consists of sour cherries for the most part, will be about 15 percent lower than last year. There are still uncertainties in estimates as yields are extremely heterogeneous, both by varieties and by growing regions. In the case of sour cherries, fruit set was hindered. In the case of sweet cherries, yield loss is estimated at about 40-50 percent due to the consecutive waves of spring frosts, adding that many ripe fruits have cracked due to the precipitation in the past weeks. However, average fruit size is much larger due to the excessive rainfalls. Last year, extreme drought set back the development of flower buds in the summer. Therefore, flowers showed poor fertility in 2023. Frosty nights at the end of March and in April caused mild frost damage to the floral organs which weakened the fertility and lowered the fruit number.

In Bulgaria's MY 2023/24, Post estimates a 15 percent reduction in the cherry crop, as weather conditions have not been favorable for stone fruit development. Mild winter weather until early April was good for orchards but April and May were challenging for stone fruits due to unusually cold and rainy weather including also frosts. Many cherry orchards are estimated to remain unharvested due to significant losses, lack of labor and prices not covering production costs for low yields, especially in central and north-east part of the country. Overall, cherries were of smaller size and more suitable for processing. The industry estimates that most of this year's harvest of cherries will be destined for processing.

German cherry production for MY 2023/24 is estimated at 45,420 MT. This is a 6.7 percent decrease compared to the preceding year and 3.5 percent below the ten-year (2013-2022) average. Sweet cherry production is estimated at 35,560 MT and sour cherries at 9,860 MT. In MY 2022/23, production amounted to 38,376 MT, including sweet cherries and sour cherries. The harvested area for sweet and sour cherries is expected to amount to approximately 5,570 and 1,554 ha, respectively. Germany is more competitive for sweet cherries than for sour. Most of the sweet cherry production is for fresh consumption and consumers are willing to pay a premium for locally produced cherries while sour cherries are destined for processing. Additionally, according to official data, German cherry area shows a downward trend, especially in tart cherries, because of lower competitiveness.

After a good crop in 2022, France's cherries crop in MY 2023/24 is expected to slightly decrease but is still 20 percent above the five-year average. Rainfall and local hailstorms in May damaged the early varieties and boosted insect attacks especially of *Drosophila Suzukii*. Lack of winter rain in the southern regions of France lowered the fruit size in those regions, but elsewhere, fruits are on average larger. Area planted to cherry trees continues to slowly decline as old orchards are not systematically renewed. Producers blame the lack of new disease resistant varieties as well as the high production cost driven by labor costs.

In Portugal's MY 2023/24, according to official data, cherry production may decline by 50 percent due to unfavorable weather conditions and low productivity yields. Lack of cold hours due to the severe drought in early 2023 affected flowering and fruit setting especially in the early varieties. In addition, heavy rains in late May affected the fruit ripening. In the previous season, cherry production amounted to around 24,000 MT.

## **Consumption**

In MY 2023/24, EU consumption of cherries including cherries for processing may strongly decline to an estimated volume of around 682,000 MT, due to the shortage of EU cherry production. Southern EU countries are the biggest EU consumers of fresh cherries together with Germany. As in peaches and nectarines, high prices and inflation rates due to the conflict in Ukraine are negatively impacting fresh cherry consumption.

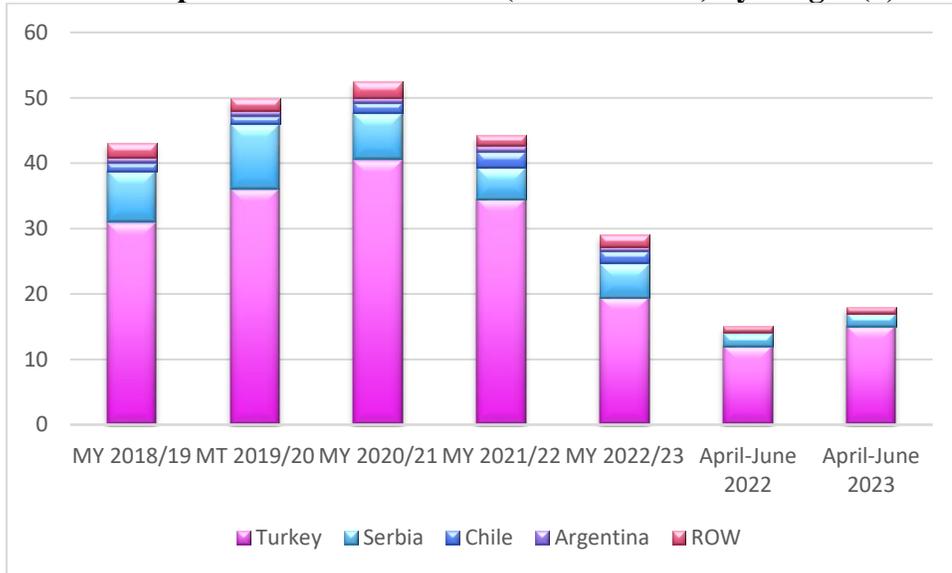
Sweet cherries are a seasonal fruit consumed fresh. Sour cherry is mainly used by the processing industry. The main sour cherry products are frozen fruits, juice concentrates, and jams or marmalade. In countries such as Spain, Portugal, France, Italy, and Greece, domestic consumption is almost exclusively fresh. In Germany, fresh cherries are considered a seasonal product and stocked in supermarkets mainly during the German marketing season (June/July). In Hungary, the average per capita fresh fruit consumption is under the EU average. The Hungarian Ministry of Agriculture is conducting a cherry consumption promotion campaign to intensify fruit consumption and increase consumers' trust in Hungarian fresh fruit products.

## **Trade**

A large amount of intra-EU trade exists from main producing Member States, mainly from Spain and Greece. The EU is a net importer of cherries sourced mostly from Turkey, which accounts for nearly 70 percent of the EU imports. Other relevant suppliers include Serbia, Chile, and Argentina. These last two are relevant during the Northern Hemisphere off-season. In MY 2022/23, EU imports of U.S. cherries were valued at \$240,000 primarily shipped to Spain. EU imports of cherries are largely driven by Germany, which is the third largest importer of cherries in the world after China/Hong Kong and the United States.

In MY 2022/23, EU cherry imports significantly declined to 29,000 MT and were valued at \$97 million due to the increase in domestic cherry supply. In MY 2023/24, due to the expected shorter production, EU imports of cherry may rebound (Figure 8).

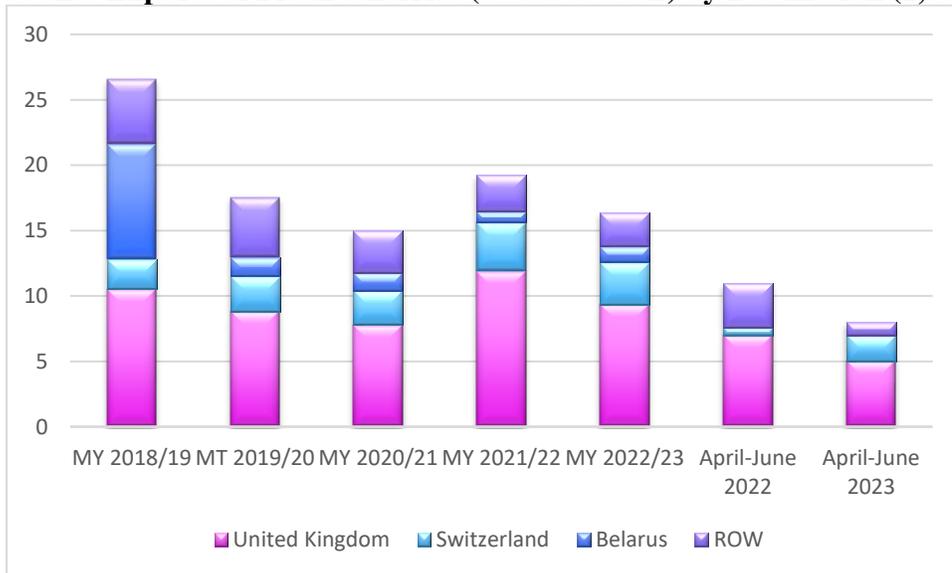
**Figure 8. EU Imports of Fresh Cherries (Sweet & Sour) by Origin (1,000 MT)**



Source: Trade Data Monitor LLC.

While a large portion of trade takes place intra-EU, main extra-EU destinations of cherries include United Kingdom, Switzerland, Belarus, and Ukraine. Spain is the main cherry exporter to EU and non-EU markets. In MY 2022/23, EU cherry exports slightly declined and amounted 16,400 MT valued at \$61 million.

**Figure 9. EU Exports of Fresh Cherries (Sweet & Sour) by Destination (1,000 MT)**



Source: Trade Data Monitor LLC.

## Trade Shows

Trade shows 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 sector in the EU include:

<p><b>FRUIT LOGISTICA</b>          Berlin, Germany (Interval: yearly)          Target Market: Germany/EU/Central &amp; Eastern Europe</p> <p>FRUIT LOGISTICA is the leading European trade show for fresh and dried fruit, nuts, and related products.  <a href="https://www.fruitlogistica.de/en/">https://www.fruitlogistica.de/en/</a></p>	<p>Next Edition:          February 7-9, 2024</p>
<p><b>BIOFACH</b>          Nuremberg, Germany (Interval: yearly)          Target Market: Germany/Europe</p> <p>The leading European trade show for organic food and non-food products.  <a href="http://www.biofach.de/en">http://www.biofach.de/en</a></p>	<p>Next Edition:          February 13-16, 2024</p>
<p><b>FRUIT ATTRACTION</b>          Madrid, Spain (Interval: yearly)          Target Market: Spain/EU/International</p> <p>Fruit attraction is an international trade show for the fruit and vegetable industry sector with more than 1,600 exhibitor companies from around the world.  <a href="http://www.fruitattraction.com">http://www.fruitattraction.com</a></p>	<p>Next Edition:          October 3-5, 2023</p>

## Policy

### EU Policy Response to the War in Ukraine

On March 23, 2022, the European Commission published a Communication on ‘[Safeguarding food security and reinforcing the resilience of food systems.](#)’ This Communication outlines short- 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. A total of €500 million has been allocated to member states 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 percent using national funds. Despite the measures in place, the European fresh produce sector remains concerned about market stability since the focus of this support is on crops and fertilizer availability.

## **EU Fertilizer Plan**

On November 9, 2022, the European Commission published a [Communication](#) on the availability and affordability of fertilizers in the EU. The aim of this long-awaited document was to propose solutions to address the significant input price increases EU farmers are facing, which grew by 149 percent from September 2021 to September 2022 for nitrogen fertilizers. The Communication proposes using emergency funds from the CAP 2023 agricultural reserve to stabilize agricultural markets and create a market observatory system for fertilizer prices. Additional information may be viewed at: [EC Factsheet: Ensuring the availability and affordability of fertilizers](#).

## **The European Green Deal**

On December 11, 2019, the Commission presented its [Communication on the European Green Deal](#). The flagship proposal is a draft European Climate Law that will make the EU's 2050 climate neutrality objective binding across the Union. The Green Deal includes a "[Farm to Fork Strategy](#)" and a "[Biodiversity Strategy](#)" that aim to support the Green Deal's objectives by fundamentally changing the way agriculture operates and how food is produced for, and provided to, EU consumers. Both strategies were published on May 20, 2020. Key aspects of the two Strategies include: reducing pesticide use, supports to domestic production of plant protein for animal feed, increasing organic production, and increasing soil and nature conservation by setting aside a minimum of 10 percent of the existing agricultural area into higher biodiversity landscape features.

## **The Farm to Fork Strategy**

The F2F Strategy highlights 27 actions aimed to transform the way EU food is produced, processed, transported, presented, and sold. The full F2F Strategy is available [here](#). The Commission identified these actions to further the Green Deal goals, reduce greenhouse gas emissions, and pursue economic growth decoupled from resource use. 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 percent by 2030, as well as the reduction of the use of fertilizers by at least 20 percent among other cuts. Additionally, the Commission set a goal that 25 percent of agricultural lands should be used for organic farming, up from the current 8 percent. For additional information on Green Deal pesticide use reduction proposals, including improved collection of pesticide use statistics and proposed revision of existing pesticide legislation, see [GAIN report: Pesticides Initiatives in the EU Farm to Fork Strategy](#).

## **Biodiversity Strategy**

The EU Biodiversity Strategy provides a broad focus on nature conservation and tackling biodiversity loss in the EU and globally. The full Biodiversity strategy is available [here](#). 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. The Biodiversity Strategy also aims for further soil and nature conservation by setting aside a minimum of 10 percent 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 percent of all EU land.

### **Common Agricultural Policy Reform**

The CAP supports agriculture and rural development throughout the EU with a significant portion of the total EU budget (about [39 percent](#)). A political agreement was finalized on the CAP 2023-2027 after the “trialogue” negotiations concluded between the European Council, the European Commission, and the European Parliament over the summer 2021. The European Parliament granted final approval on November 23, 2021, and the Council provided final approval on December 2, 2021. The CAP legislative framework is delineated by the [Common Market Organization](#), the [Strategic Plan](#), and the [Horizontal regulations](#). By these decisions, the new CAP began on January 1, 2023. Major changes from the previous CAP include a new “delivery model” that de-centralizes funding and a new requirement that EU Member States develop National Strategic Plans (NSPs) in line with Commission priorities, such as the EU Green Deal.

### **Next Generation EU**

Since 2020, €8 billion under the Next Generation EU Recovery Instrument (Next Generation) has been allocated to the European agricultural fund for rural development (EAFRD). The [Next Generation EU](#) is a €806.9 billion temporary recovery instrument which aims to help repair the economic and social damage brought about by the coronavirus pandemic.

### **Certification of Fruit and Vegetables**

Fruit and vegetables exported to the EU require a phytosanitary certificate. A USDA/Animal Plant Health Inspection Service (APHIS) inspector issues these certificates. This standard-setting body coordinates cooperation between nations to control plant and plant products 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 [Commission Implementing Regulation \(EU\) 2019/2072](#). There is more information available on the DG SANTE website: [Trade in plants and plant products from non-EU countries](#). 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 for certain products when justified, as per [Commission Implementing Regulation \(EU\) 2022/2389](#) of December 07, 2022. There is more information available on the DG SANTE website: [Reduced frequency checks](#).

Note: The commission has updated the [Notification of reduced plant health checks for 68 products for 2023](#).

## Marketing Standards

Fresh fruit and vegetable imports into the EU also must comply with the EU-harmonized marketing standards. These standards apply at all marketing stage 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 in place for stone fruits, such as peaches and nectarines, and are set out in Part 5 of Annex I on page 58.

## Maximum Residue Levels (MRLs) for Stone Fruits – Upcoming reviews

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 citrus fruit in the [global MRL database](#).

Phosmet is the active ingredient in a priority insecticide that is used by U.S. cherry growers to control a variety of insect pests. The European Commission has published the official [Implementing Regulation \(EU\) 2022/94](#) withdrawing the approval of phosmet. The current EU cherry MRL for phosmet is still at 1ppm, which is more restrictive than the U.S. MRL (10 ppm). Following the withdrawal of the phosmet approval, the current MRLs for phosmet will however be lowered to 0.01 ppm effective September 15, 2023, as per [Commission Regulation \(EU\) 2023/1029](#) of May 25, 2023. 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>

**Upcoming reviews for active substances:**

Active substance	Expiration date	Last day of application for renewal of the active substance
Fenpicoxamid	10/11/2028	11/10/2025
Isofetamid	09/15/2026	09/15/2023
Oxathiapiprolin	03/03/2027	03/03/2024

## Tariffs

**First Come, First Served Principle:** Regarding the administration of import tariff quotas, certain types of stone fruit are subject to the [“first come, first served”](#) principle:

Product	Tariff code	Quantity (Kg)	Tariff quota Period	Origin	In-Quota Duty
Fresh (sweet) cherries	0809 29 00	105 00 kg	May 21-July 15	All third countries except the UK	4 percent ad valorem
Preserved fruit including apricots, cherries, and peaches	2008 20 11 2008 20 19 2008 20 31 2008 20 39 2008 20 71 2008 30 11 2008 30 19 2008 30 31 2008 30 39 2008 30 79 2008 40 11 2008 40 19 2008 40 21 2008 40 29 2008 40 31 2008 40 39 2008 50 11 2008 50 19 2008 50 31 2008 50 39 2008 50 51 2008 50 59 2008 50 71 2008 60 11 2008 60 19 2008 60 31 2008 60 39 2008 60 60 2008 70 11 2008 70 19 2008 70 31 2008 70 39 2008 70 51 2008 70 59 2008 80 11 2008 80 19 2008 80 31 2008 80 39 2008 80 70	2 820 000 kg	January 1-December 31	All third countries	20 percent ad valorem

**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 that 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. The tariff and statistical

nomenclature and the Common Custom tariff levels for 2023 are published in [Commission Implementing Regulation \(EU\) 2022/1998](#) in EU Official Journal L 282. This version applies as of January 01, 2023. The tariffs for stone fruits can be found on Chapter 8 on page L 282/105 to 107.

### **Tariff Rate Quotas 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. The EU Parliament and Commission must still ratify the agreement, but it will eliminate 93 percent of tariffs for MERCOSUR exports to the EU, while offering preferential treatment for the remaining seven percent. 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 a significant disadvantage.

**Other Free Trade Agreements affecting stone fruit exports to the EU:** The EU is negotiating and has implemented several Free Trade Agreements (FTAs) with other countries and regions such as major EU stone fruit partners. Chile, Turkey, Morocco, the UK, Canada, which include concessions on food products. Additional information is available on the website of the EC at: [EU Trade agreements \(europa.eu\)](#)

### **Bans Impacting Stone Fruit Trade**

**Russian 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 stone fruit, 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 continued to extend the ban every year. The Commission introduced specific market support measures for the European fruit and vegetable sector from the start of the ban in 2014 until 2017. The emergency measures for fruit and vegetables were phased out on June 30, 2018. Overall, the EU granted \$588 million (€500 million) of aid to EU producers of fruit and vegetables corresponding to 1.7 million tons of withdrawals from the market.

### **Attachments:**

No Attachments