

Apfelerntebericht 2025/26 Update Dezember 2025

Europe

Due to cooler summer temperatures and persistent water shortages, this year's harvest began two to three weeks later than in the previous season and has been in full swing since 15 September 2025. As expected, the weather changed at the start of calendar week 40: since then, cool and, above all, rainy conditions have prevailed in Eastern and Southern Europe. This is having a noticeable effect on the quality of the harvest, especially on its storability. Numerous batches from Eastern and Southern Europe are not expected to reach the target storage period of May to August 2026.

The harvest yield for the 2024/2025 season is not expected to exceed the previous year's level of 10.5 million tonnes and thus remains stable. The frost damage in spring 2025 and the ongoing drought in Eastern Europe and the Balkans – combined with the pronounced alternation in Italy – unfortunately almost completely offset the very good harvest results in Spain, France, the Benelux countries and the German-speaking region.

The harvest of **organic apples** in the 2024/2025 season will be lower than in the previous year. The main reason for this is the almost complete absence of processing apples from Eastern Europe and the Balkans. These deficits cannot be offset by the Western European growing regions, as processing apples only account for around 10% of the total harvest here.

The ratio between conventional and organic harvest volumes remains stable overall. While the organic share in Western and Southern Europe remains constant at 10–12% of the total harvest volume, the share in Eastern Europe and the Balkans remains at only 2–3%.

Germany

Sales in the table fruit sector show noticeable weakness from September to November 2025. This is due to the continuing large contract volumes from Italy and overseas that are still being sold off by food retailers. As a result, the availability of processing goods is currently comparatively high and easily meets demand. As producers and producer organisations are unable to place their planned quantities on the market in full, these are increasingly being stored in CA storage facilities in order to secure the contractually bound quantities until August 2026. This development is likely to lead to higher selling prices on the markets. In the significantly larger conventional goods segment, prices often trended downwards. Demand was unable to keep pace with the abundant supply, which put additional pressure on price developments.

biosanic Pommer In the smaller organic sector, prices remain at the high level of the previous year. The good harvest results in northern and central Germany are offset by lower than

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expected harvests in southern Germany, Austria and Italy. Overall, this results in an organic harvest volume that is almost identical to that of the previous harvest cycle. Despite difficult and often sobering conditions, there are several developments that were not expected in this form and are leading to continued high purchase prices for organic processed goods:

1. High quality:

As in the previous year, the harvested quantities are of excellent quality from the producers' point of view: around 90% table apple quality and 10% processing goods. Due to this good quality, significantly less produce is currently going into processing (38.6% less than in the previous year, according to preliminary market statistics).

2. Price demands in food retailing rejected:

The appeal by food retailers to offer organic apples at lower prices in view of stable harvest volumes was unanimously rejected by producers and producer associations, citing the significant increase in costs since the beginning of the year.

3. Processing in the Lake Constance region:

All the produce harvested in the Lake Constance region since the start of the harvest (September to the end of October) has been processed into juice. The prices offered by the rest of the processing industry were considered too low, so the corresponding quantities were not sold.

4. High foreign demand:

There was strong demand for large quantities of organic processing goods (association goods) in several European processing regions, particularly in Belgium, France and northern Italy. Due to lower harvests in these regions, significantly higher prices were achieved than in Germany. A considerable proportion of the available processing goods were therefore quickly sold and exported there.

5. Cost effects already priced in from 2026:

The current price negotiations have already taken into account the rising costs from January 2026 – particularly for wages, energy (including higher CO₂ taxes) and transport – and these are reflected in higher prices.

Poland and Eastern Europe

The reported production volume of the Polish organic apple harvest continues to decline, reaching its lowest level since 2017 this year. The challenges of the season can be divided into two categories: weather-related and market-related factors. In the first category, weather conditions posed a significant problem. Spring frost, followed by a cool, very dry and sunless summer, affected colouring and led to uneven ripening of the fruit.

In the second category, the focus is on quality restrictions: stunted growth, deformities, frost rings, scab infestation and very low compressive strength due to the dry conditions during the growth phase. As a result, the quantity of apples suitable for both storage and processing in peeling quality is extremely limited.

In addition, a growing export market – particularly to North Africa and Asia – and rising costs for operating resources, energy and transport are driving up prices for suitable processing goods. Despite these conditions, we were able to contract the required quantities at conditions similar to those of the previous year.

In addition, we are seeing sustained high demand for organic processing goods from production facilities in Hungary, Czechia, the Balkan countries and even Moldova, where harvest losses – as already reported – are between 50 and 80 per cent.

These additional outflows are stabilising the price level and keeping it at the high level of the previous year.

Development apple cultivation

We expect harvest volumes in Germany to decline slightly in the coming years. This forecast is based on the fact that many fruit stocks need to be renewed due to their age. No significant yields are expected from the newly planted areas in the next three to four years. In addition, there is a further increase in risk due to extreme weather conditions.

It is also expected that around 20% of organic fruit producers will give up their farms within the next three to four years. The main reasons for this are reaching retirement age, a lack of succession planning, low interest in taking over farms and poor economic prospects under current market conditions.

This phenomenon is not limited to Germany, but is a pan-European problem that is likely to become more acute in the coming years. Declining harvest volumes, combined with politically induced, continuously rising costs in the areas of labour, energy, transport and operating resources, are expected to lead to permanently stable prices at a high level.

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