

Apple Harvest Report 2025/26: Update Mai 2026

Europe

The apple season in the first few months of 2026 was generally quieter than in previous years. Since January, the season has developed rather unevenly. On the one hand, we have observed a certain stabilisation in prices compared to the start of the year. On the other hand, the general market situation is not as tight as many had expected.

Stock levels across Europe remain relatively high for this time of year. According to the data, countries such as Germany, Italy, Belgium and the Netherlands have significantly more apples in stock compared to last season, in some cases 30–50% more.

It is a controlled market, with availability in Europe remaining quite comfortable. Flowering has spread from south to north, varying by region, from calendar week 15 onwards.

All trees are currently in full bloom, although there have been losses in some regions due to late night frosts.

Germany/Austria

Current sales in the fresh fruit sector are stable, though slightly below expectations. The availability of processing fruit from certified organic farming is satisfactory and sufficient to meet our needs, thanks to the good quality.

In the significantly larger segment of conventional produce, prices have tended to fall in many cases, as demand continues to lag behind the extensive supply.

In the organic sector, prices have stabilised at last year's levels. Supply is secured until the end of July.

Apple blossom began in calendar week 15 on Lake Constance. The blossoms had weathered the first light frost in mid-April, which saw temperatures briefly drop to $-1\text{ }^{\circ}\text{C}$ near the ground, without any issues. Frost damage was largely avoided thanks to the fact that German commercial orchards are generally equipped with frost protection systems.

Similarly, the second spell of frost at the end of April caused no significant losses.

Experienced growers assume that these were early 'ice saints' and no longer expect widespread frost damage to occur.

Based on our discussions, the weather events to date currently have no impact on the 2026/2027 harvest results.

It is not yet possible to assess the extent to which the spring drought will affect fruit set.

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Poland and Eastern Europe

In Poland, the picture is less clear-cut, as stock data is not always fully transparent. For the remainder of the season, we expect a market that is stable overall, but not very dynamic. High stock levels in Western Europe are likely to continue to limit significant price rises. Furthermore, many markets are still well supplied with regional fruit, which means that sales opportunities in Western Europe remain significantly limited. The decisive factor will continue to be the availability of apples of sufficiently good quality. Organic fruit has been virtually sold out since Easter.

Assessment of spring frosts in Poland

Frosty nights are causing significant crop losses across Poland.

Two weeks after the start of flowering, the first frost wave occurred, bringing temperatures of -2 °C to -7 °C over a period of 2 to 3 hours. Orchards with sprinkler systems were able to counteract this effectively, as the apple blossoms were still in the bud stage and no major damage was reported.

According to weather records from the last 40 years, the second cold snap at the end of April was unprecedented: temperatures between -5 °C and -9 °C from 10.00 pm to 8.00 am, and up to +20 °C in some regions during the day (Grojec, Warka, Bledow), caused enormous stress to the crops. Similarly, Gruppa Organic in Lipowa (Lodz and Kielce regions, Lublin) reported temperatures of -5 °C to -7 °C.

The length of this frost period and unfortunate accompanying circumstances, such as power cuts due to overloaded transformers and substation shutdowns, as well as water shortages, also brought irrigation systems to a standstill, in some cases during the night.

In summary, it can be stated that for soft and stone fruit crops where fruit set had already begun, widespread losses of between 80 and 100% occurred despite the protective measures taken. For pome fruit, damage in orchards with frost protection systems ranges – depending on the variety – between 20 and 40%, whilst orchards without frost protection measures have recorded losses of 80 to 100%.

The current forecast for pome fruit, in both conventional and organic cultivation, is just 30 to 50% of an average harvest year. For soft and stone fruit, only 10 to 20% of the usual harvest volume is currently expected. Cereals, vegetables, oilseeds and pulses without appropriate frost protection systems are also showing significant yield losses of around 60 to 80%. The Polish Ministry of Agriculture is currently preparing a request to the European commission to apply for support measures for the affected farms. The total extent of the damage is estimated to run into tens of billions.

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Slovakia, parts of the Czech Republic, the Baltic states and northern Ukraine were also affected to a comparable extent. Hungary and other Balkan countries, however, reported only regional and significantly less severe damage and came through the frost period just as unscathed as the Western European growing regions.

A further reassessment of the situation will not be possible until early to mid-June, once the follow-up measures taken have taken effect and the natural June drop has been completed.

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5 May 2026*

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