

Fresh apples and pears market drivers and perspectives 2022/23

EXPERT GROUP FRUIT – PIP FRUIT
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natürlich informiert.

Strong price pressure – because....

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EU apple crop
1-1,3 Mio. t
above market
balance

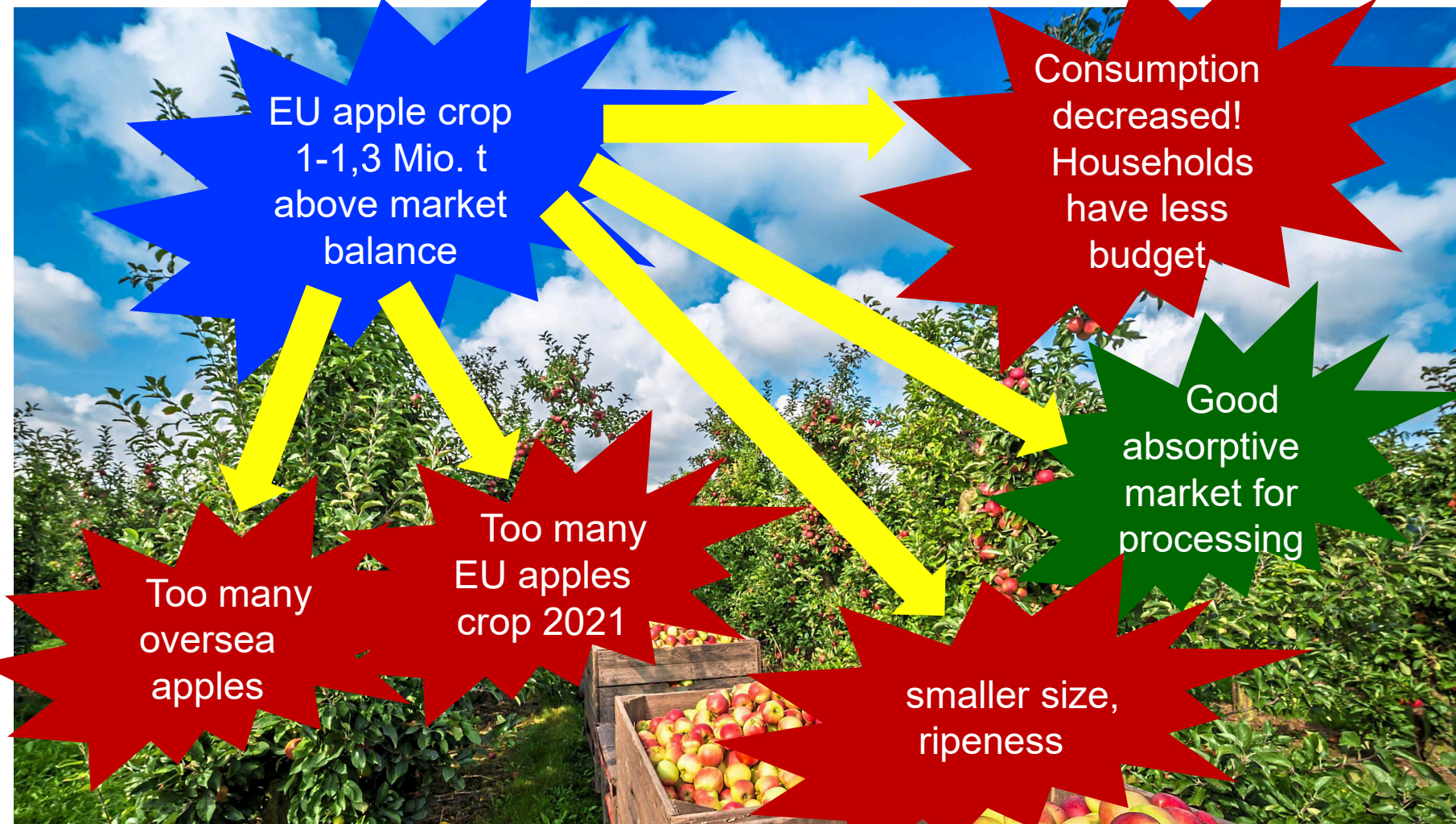
Consumption
decreased!
Households
have less
budget

Good
absorptive
market for
processing

Too many
oversea
apples

Too many
EU apples
crop 2021

smaller size,
ripeness

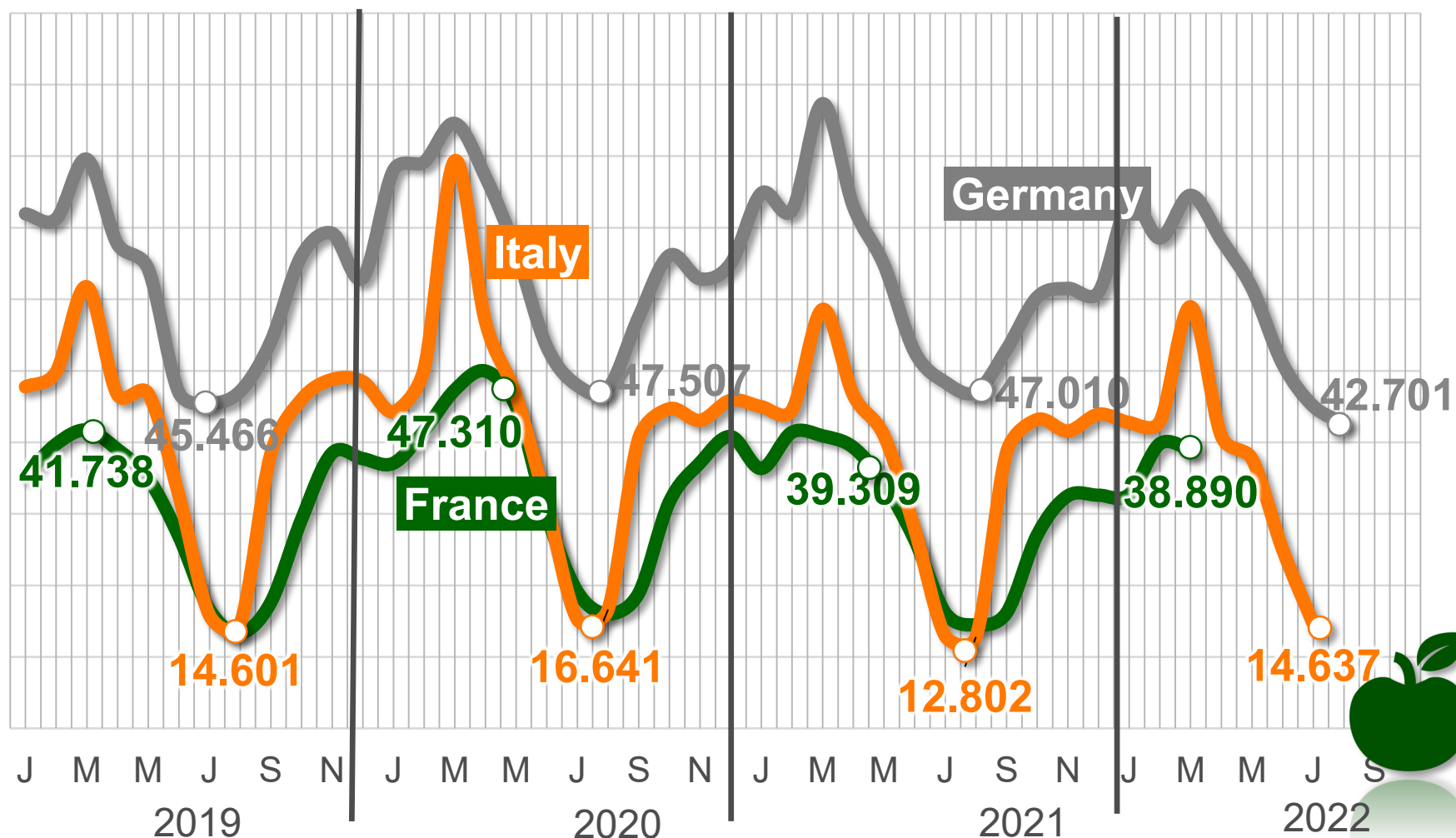




Buying volume below average



Retail – Monthly apple sales in Germany, France and Italy, in tons

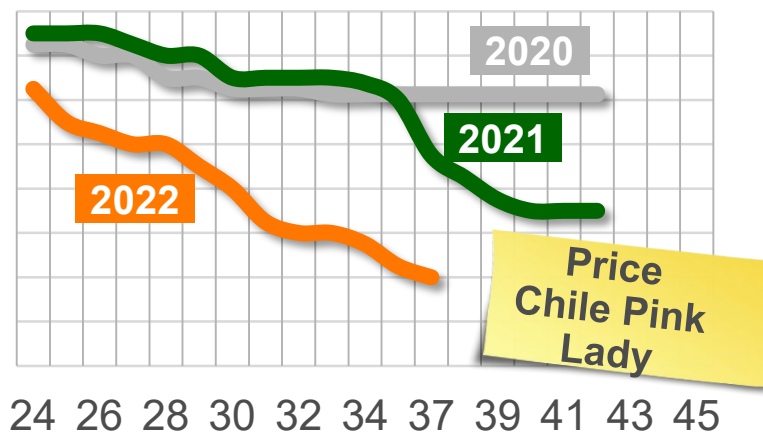
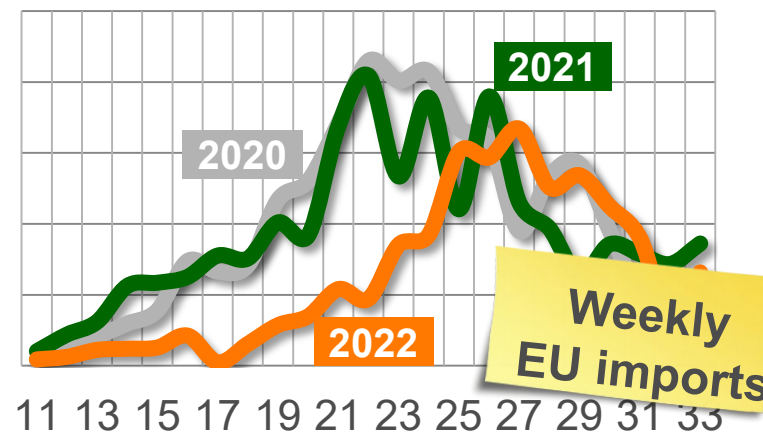
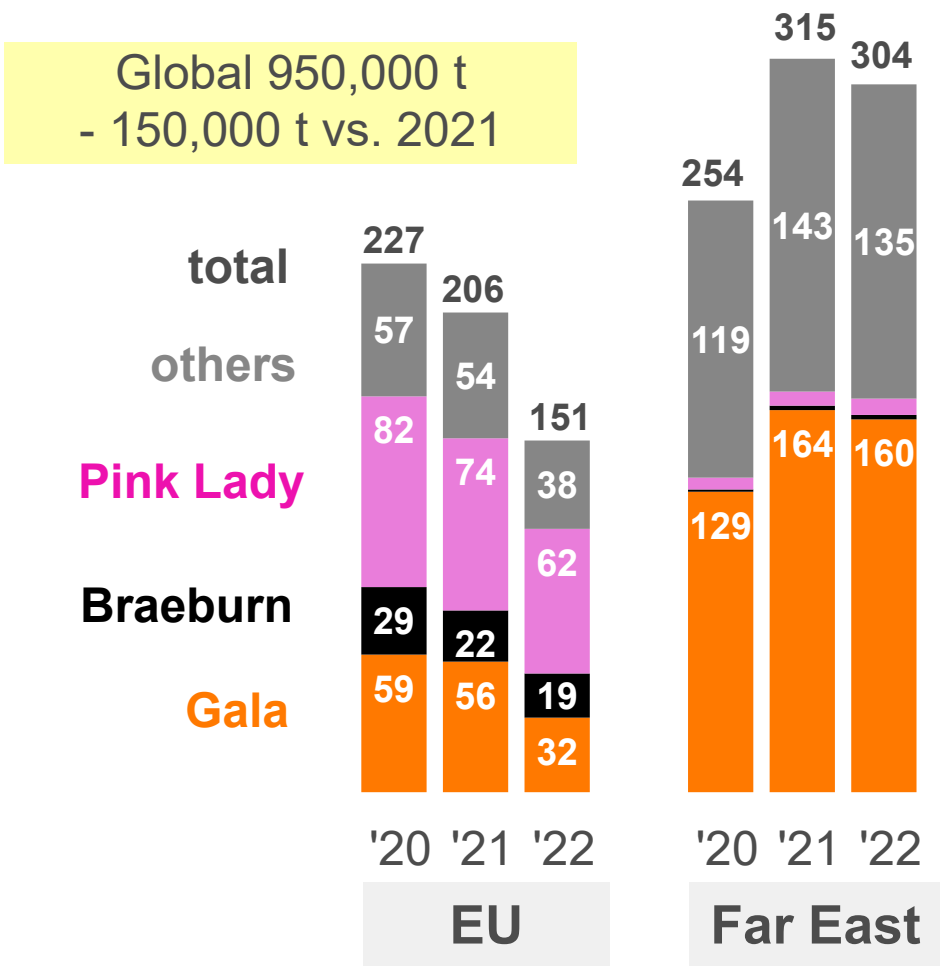


25 % less EU imports from overseas



Overseas apples – Global exports (departure) until mid- July, in 1,000 t

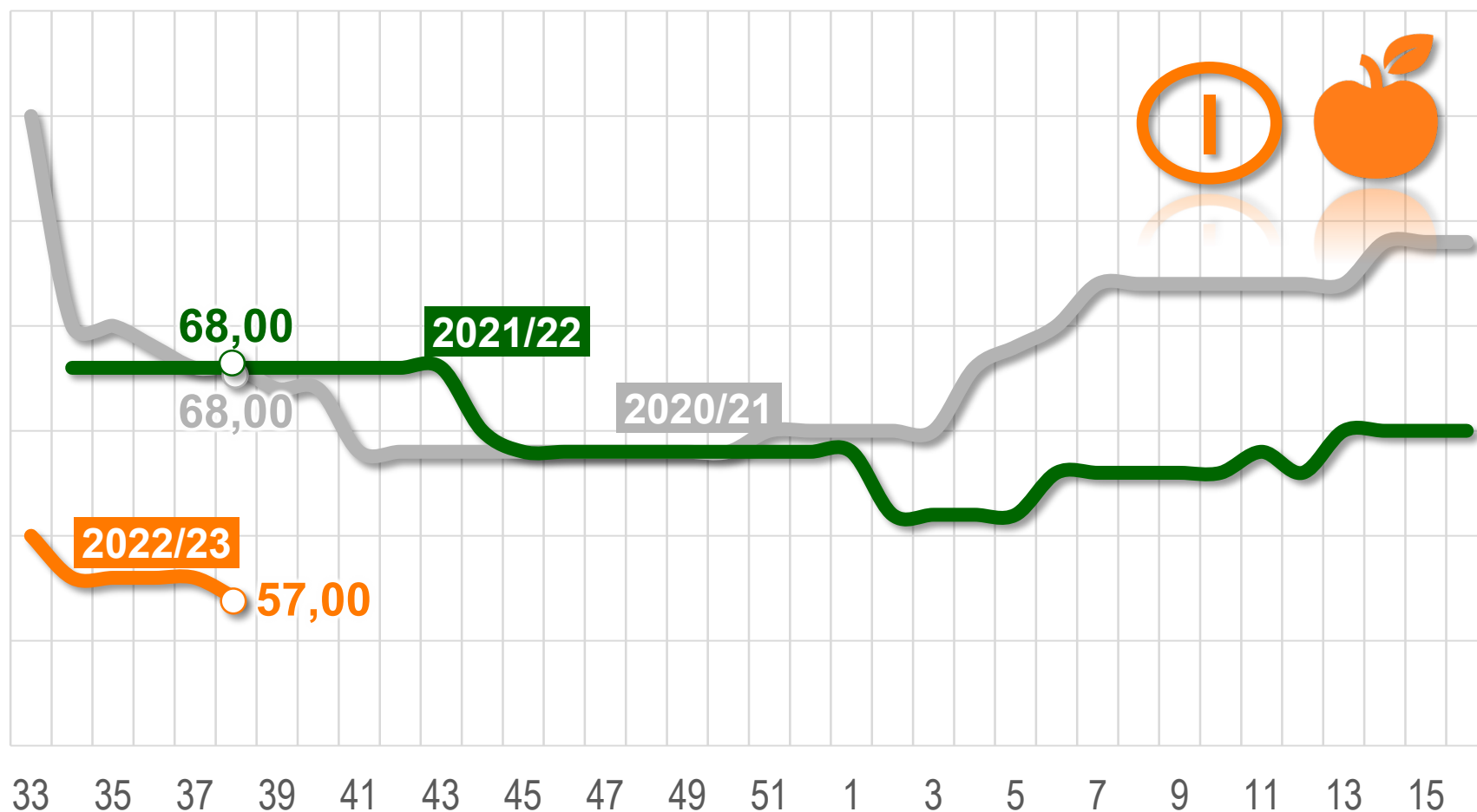
Global 950,000 t
- 150,000 t vs. 2021



UK 89,000 t (2021 = 108,000 t), Russia 25,000 t (68,000 t)

Start on a low price level

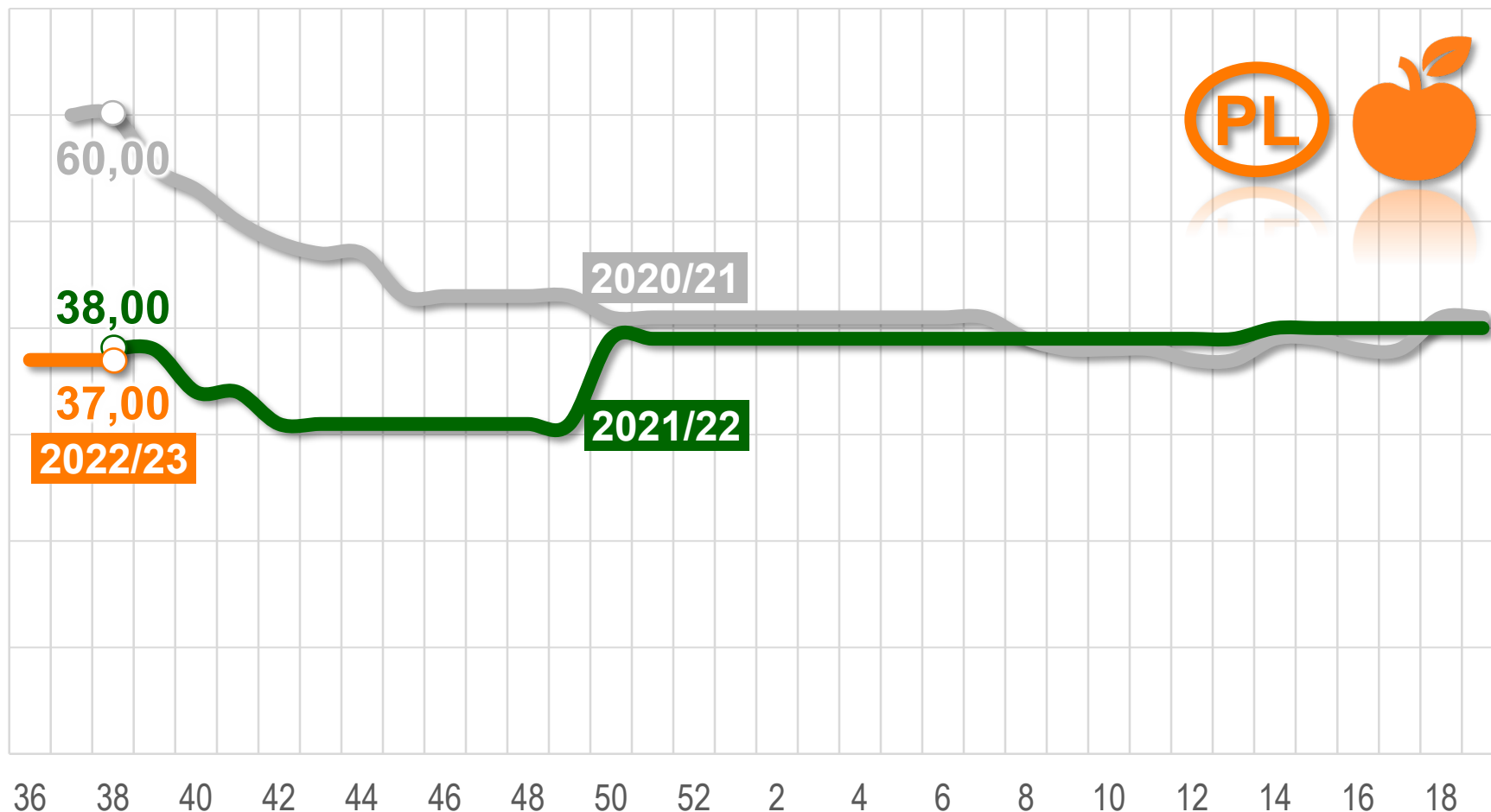
Price at region for South Tyrol Gala, Class I, 70-75 mm, in EUR/100 kg



On the same „bad“ level as last year

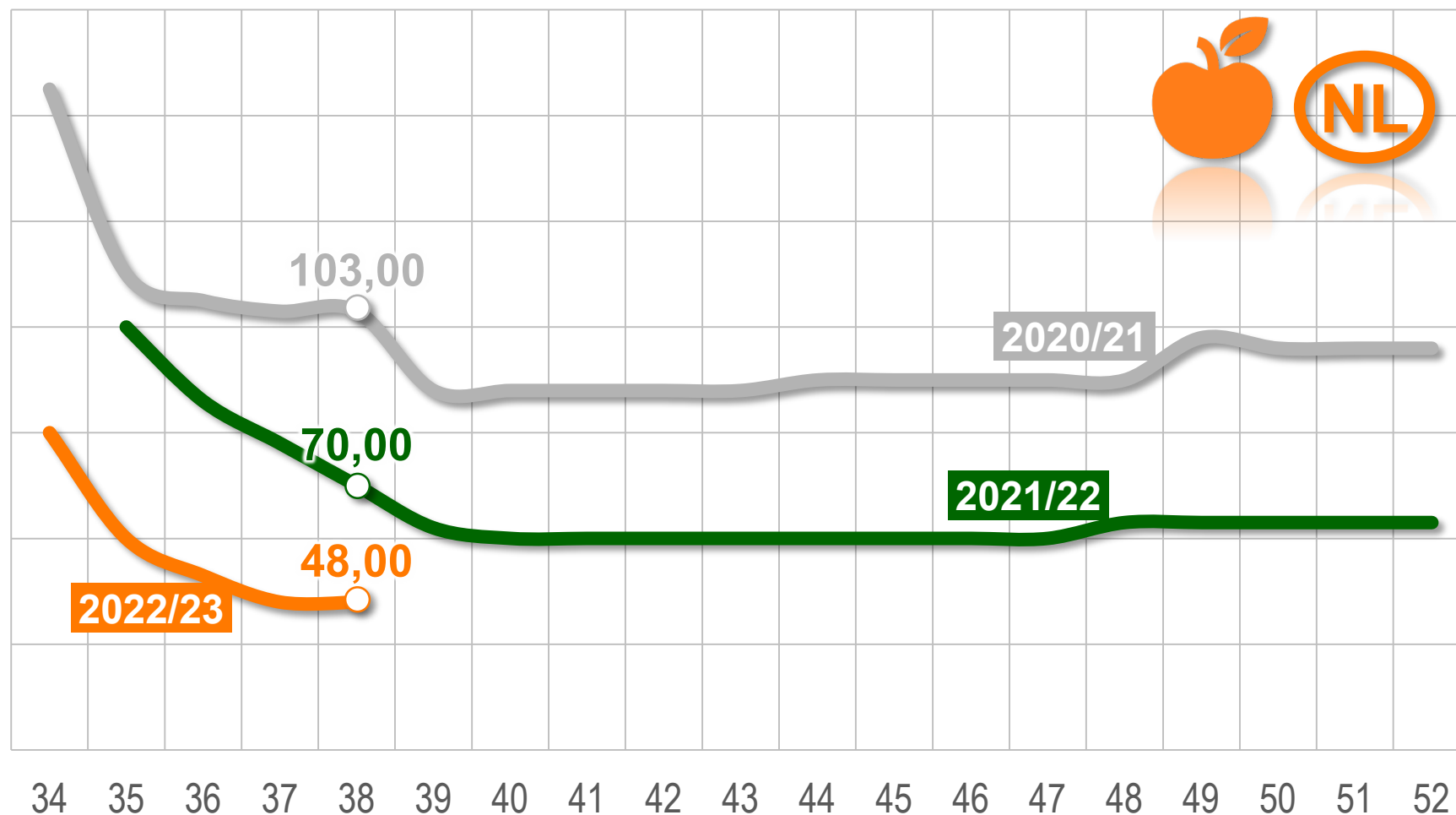


Price at region for Polish Gala, Class I, 70-75 mm, in EUR/100 kg



Strong pressure

Price at region for Dutch Elstar, Class I, 70-75 mm, in EUR/100 kg

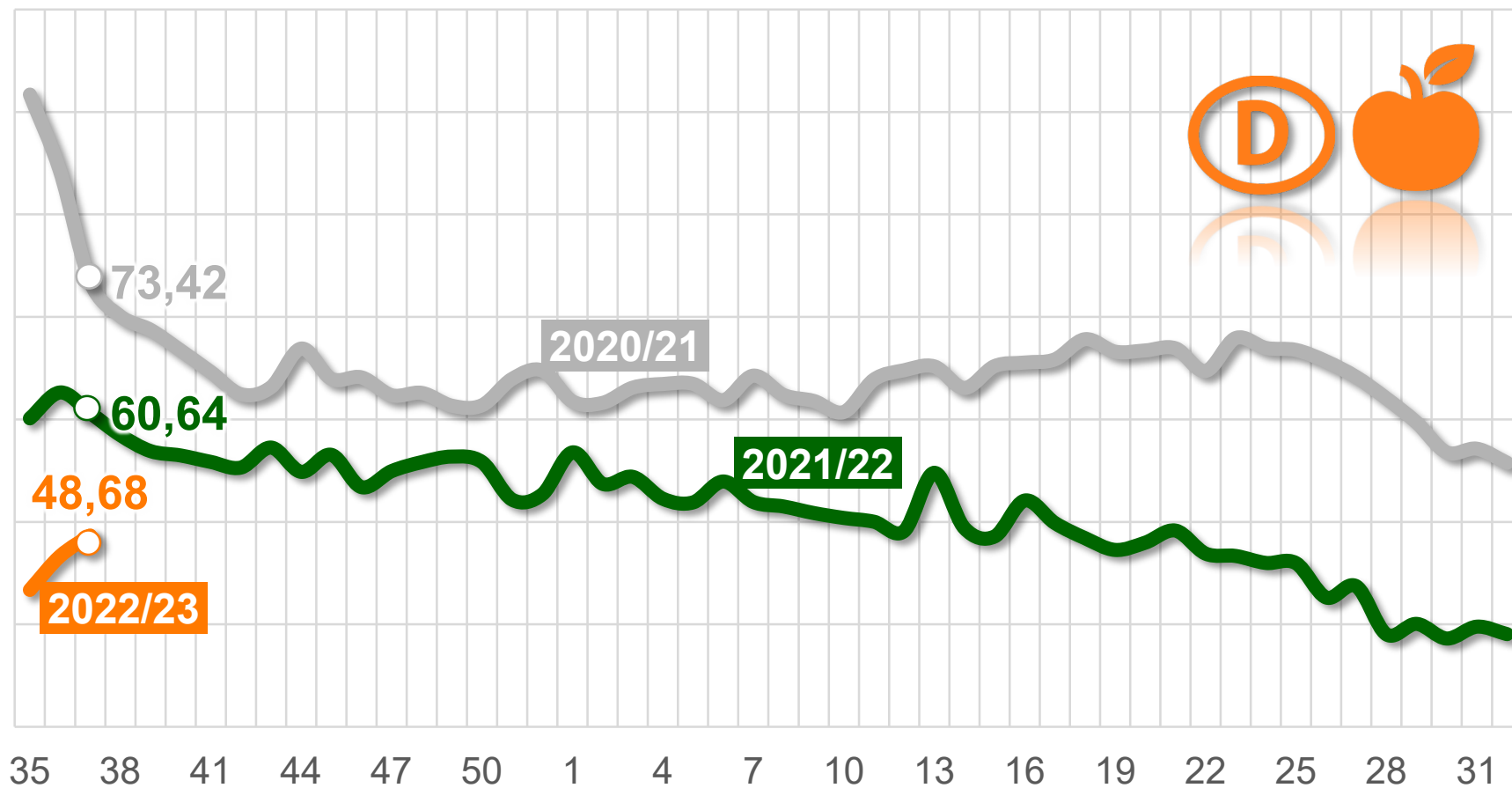




Weakest start of recent years



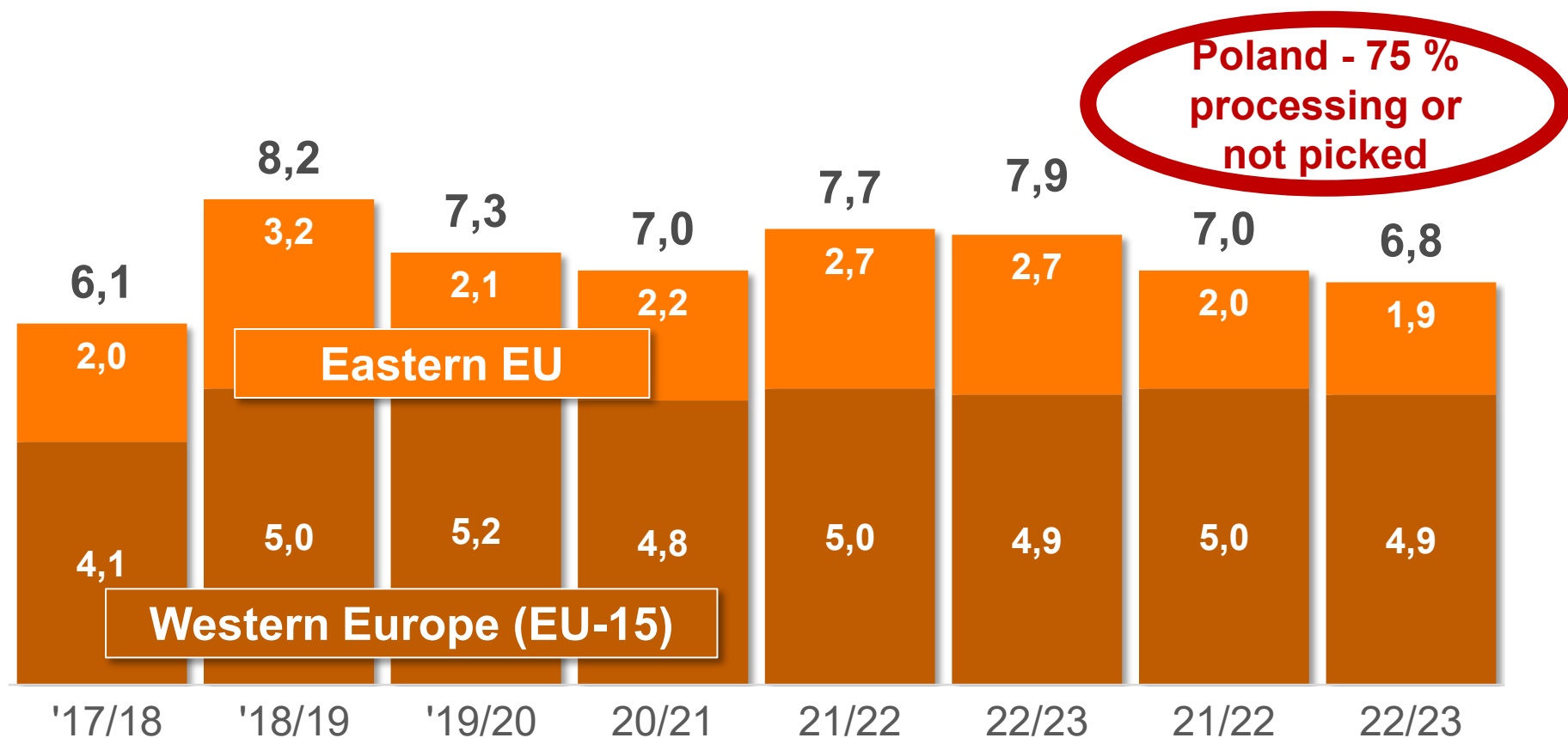
Price development German producer organisation (Lake of Constance and Lower Elbe), apples Class. I, in EUR/ 100 kg



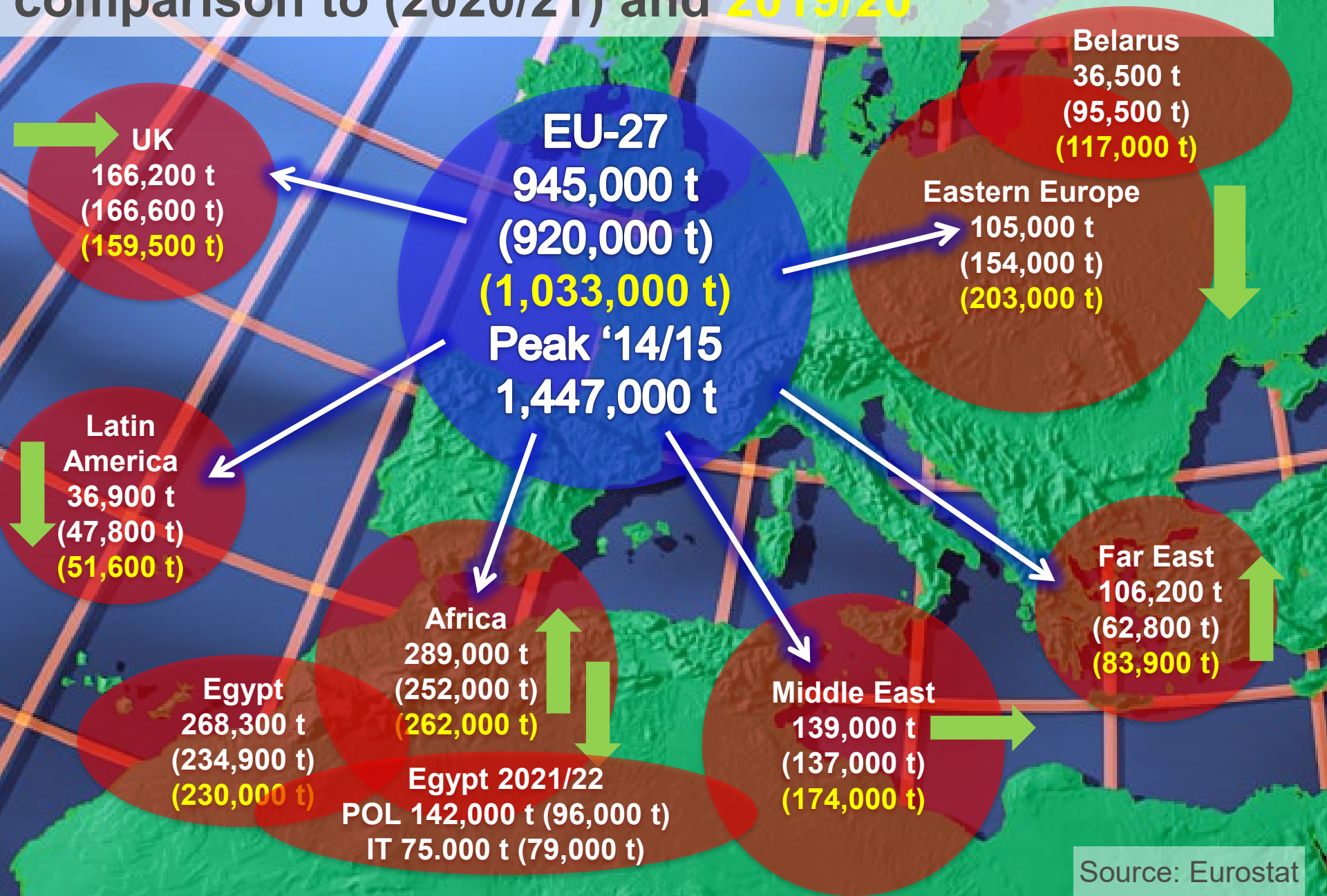
Less apples for fresh market?



EU 27 - Estimated apple volume for fresh market, in million t



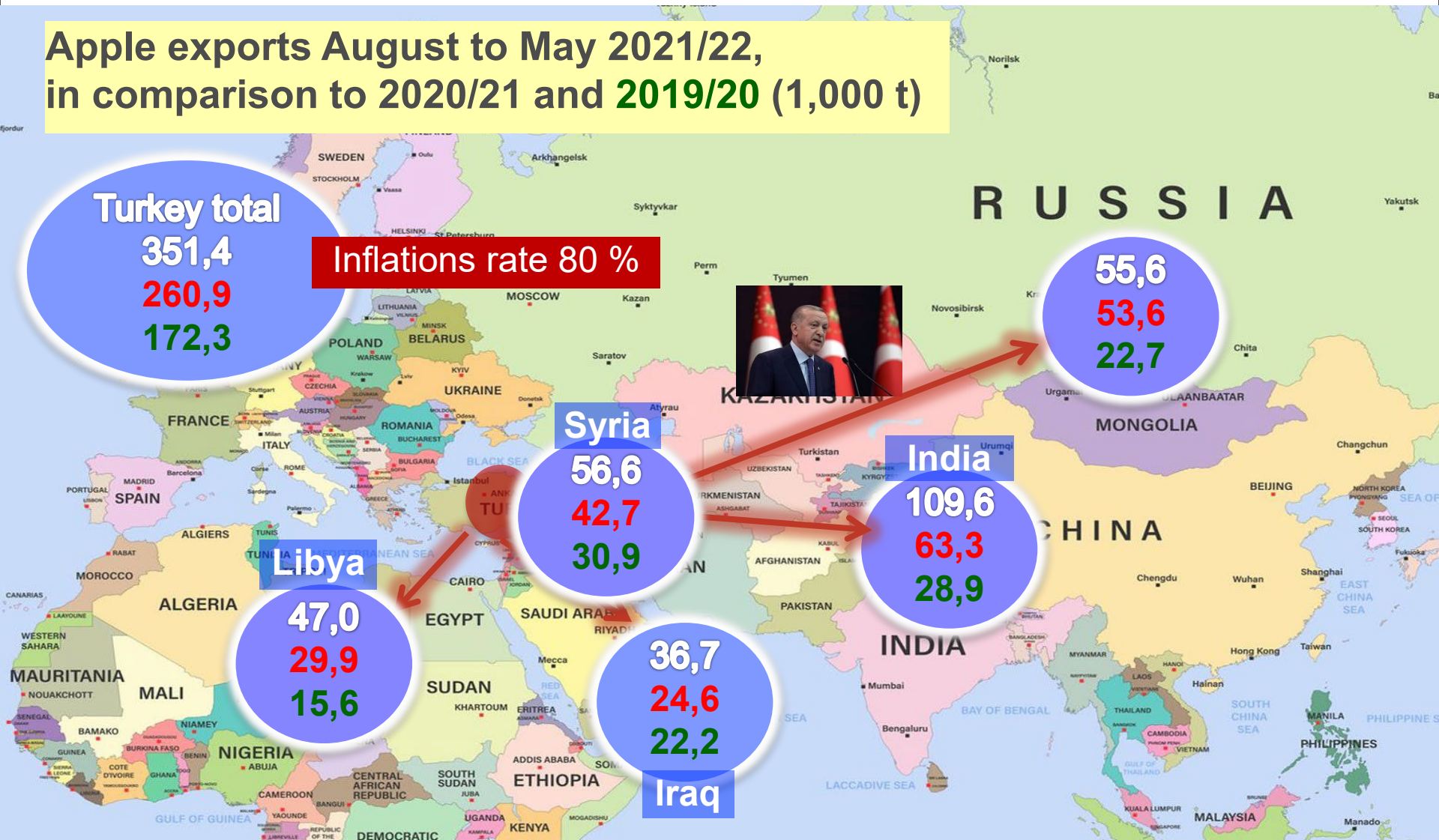
EU 27 - Apple exports in 2021/22 (August to April), comparison to (2020/21) and 2019/20



Further strong increases in exports

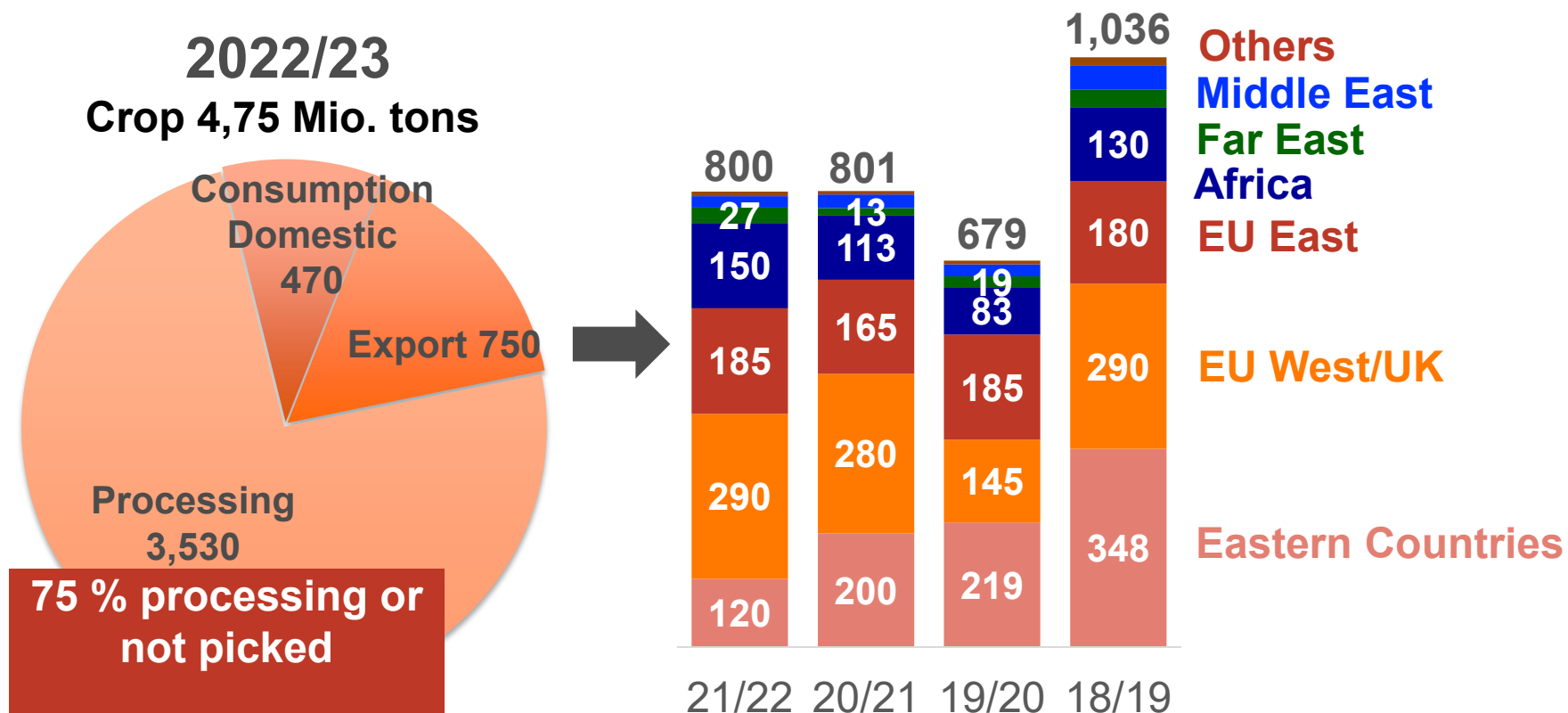
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Apple exports August to May 2021/22,
in comparison to 2020/21 and **2019/20** (1,000 t)



Not enough markets for table apples

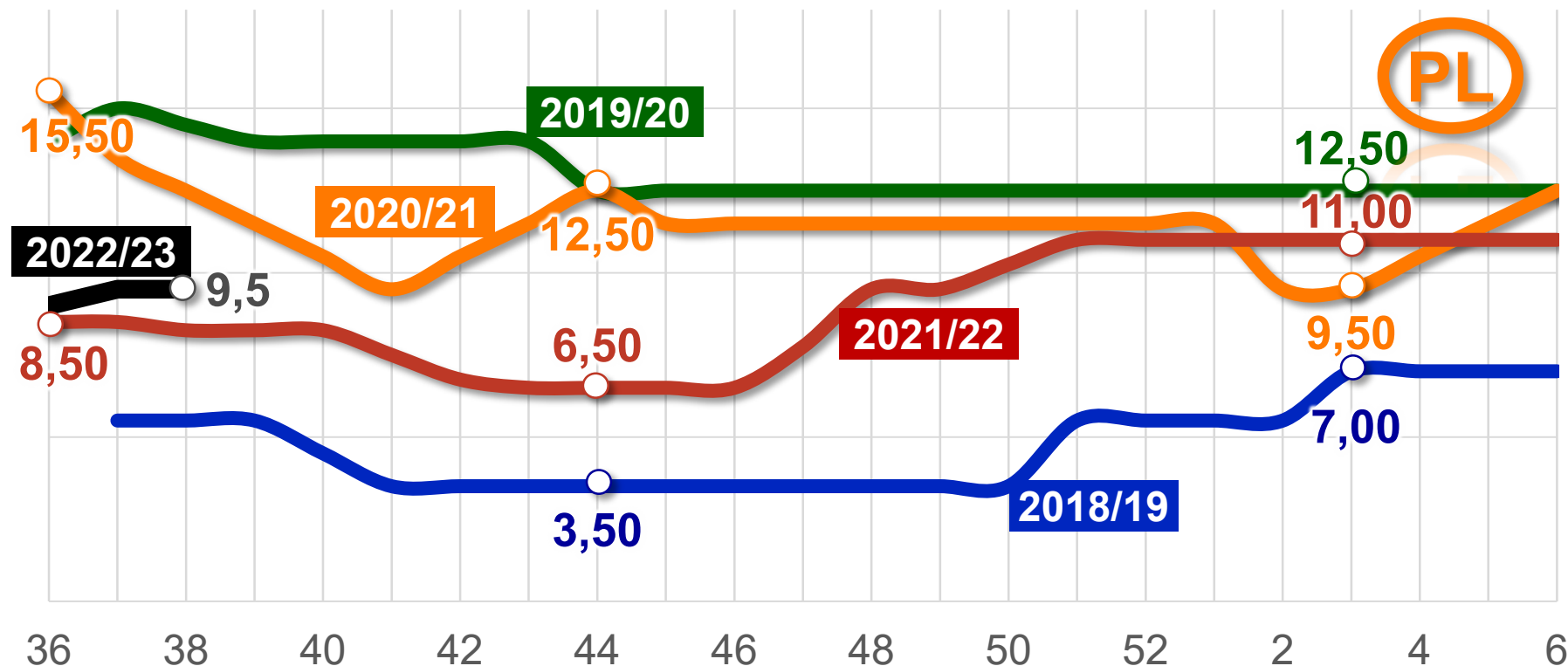
Application Polish apple crop (1,000 tons)



Higher price level than previous year

Polish processing apples – price free industry, in EUR/100 kg

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Processing apples (Sep/Oct)	2017	2018	2019	2020	2021	2022
POL free industry EUR/100kg	18-23	3,5-5,5	12-14,5	11-12	6,5-8,5	8-11

“New” varieties rapidly growing

Production of “new” varieties in Europe, in 1.000 tons

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Variety/Brand in t	2018	2019	2020	2021	2022	2025	
Cripps P./R.Glow/ Pink Lady	268	253	270	235	271	375	++
Story Inored (free variety)	14	22	32	45	58	95	++
Nicoter/Kanzi	65	70	72	70	75	80	+
RoHo 3615/Evelina	48	47	54	52	56	64	+
Scifresh/Jazz	37	43	40	48	48	50	
Cripps Red/Joya	12	13	12	15	18	50	++
Crimson Snow	10	15	20	31	35	45	+
Ambrosia	21	22	24	27	35	45	+
Scilate/Envy	7	13	15	17	24	36	++
Cosmic Crisp					8	32	++
Honey Crisp/Honey Crunch	18	17	10	16	18	20	
Others*			80	100	120	200	++
Total				656	766	1092	+ 36 %

*Giga 4.000 t (2025 = 17.000 t, Red Pop 3.000 t (17.000 t), Fräulein 4.000 t (15.000 t) and others



Price on a cheaper level started



EU organic apples - weekly sales of table apples in tons and EUR/kg

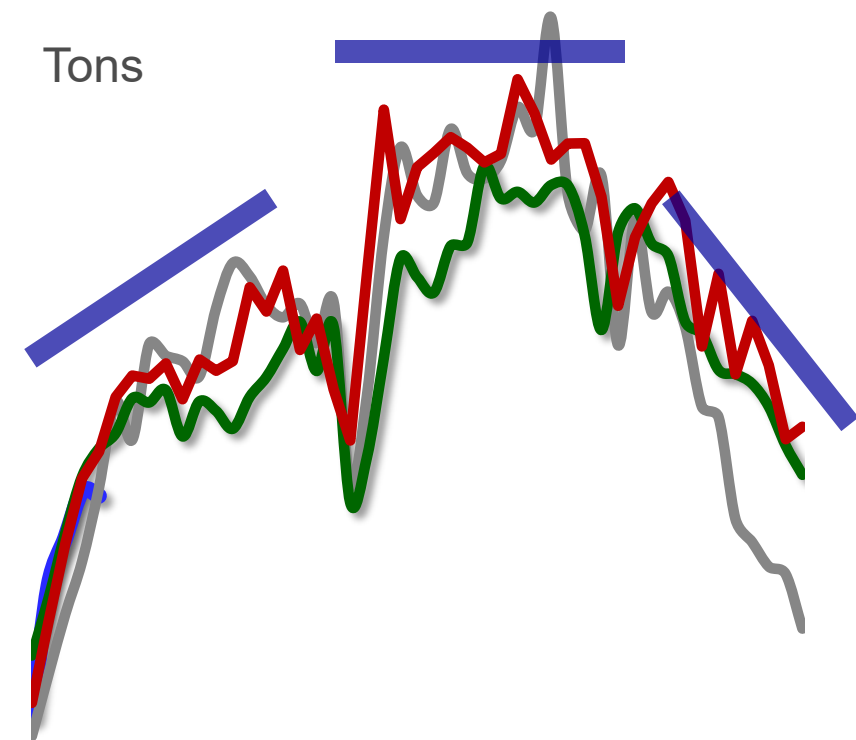
2022
225,000 t

2021
205,000 t

2020
185,000 t

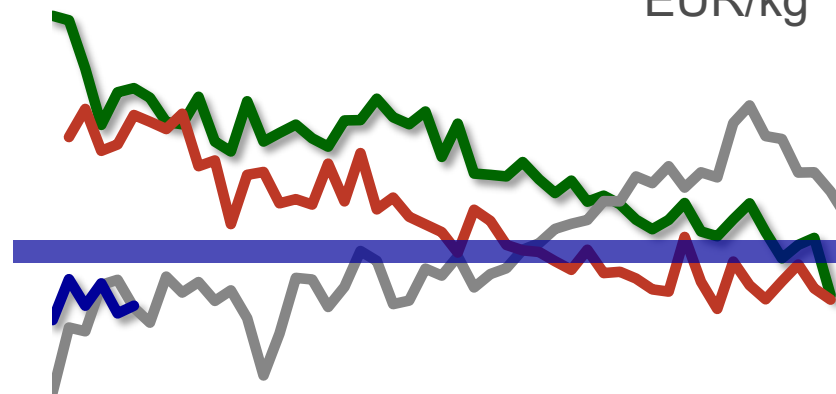
2019
145,000 t

Tons



32 37 42 47 52 5 10 15 20 25

EUR/kg



32 37 42 47 52 5 10 15 20 25

EU pears – Start more difficult than expected

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Optimistic assessment

- Most countries with less crop or on average
- Spain with lower crop and an interesting import market?
- No pressure from Portugal
- Less Italian crop, imports above average?



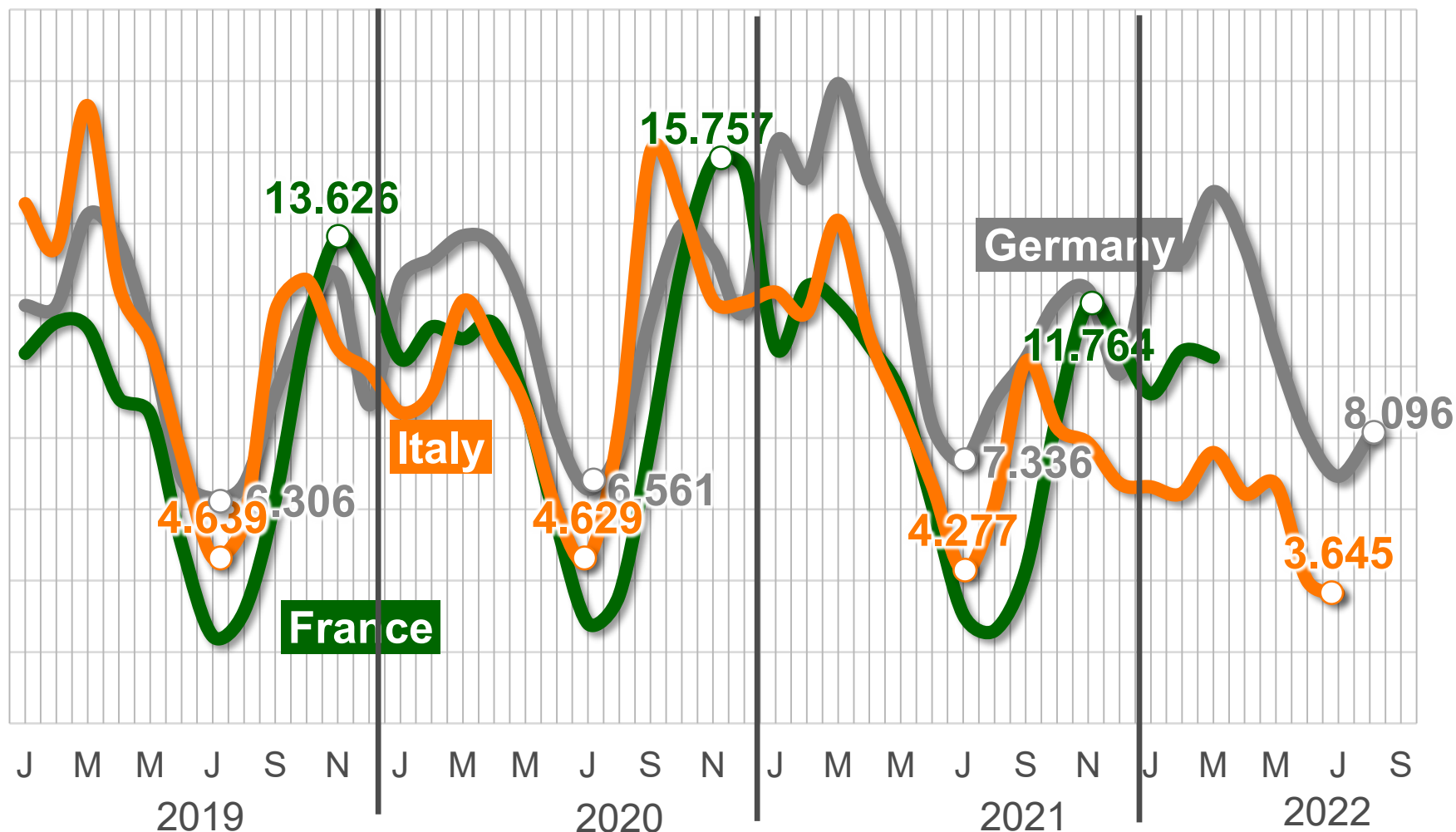
Sceptical assessment

- BEL/NL crop on high level – more export to the East necessary
- Decreasing demand in previous years, turnaround possible?
- Back to normal buying volume in France/Italy

Germany slightly increasing



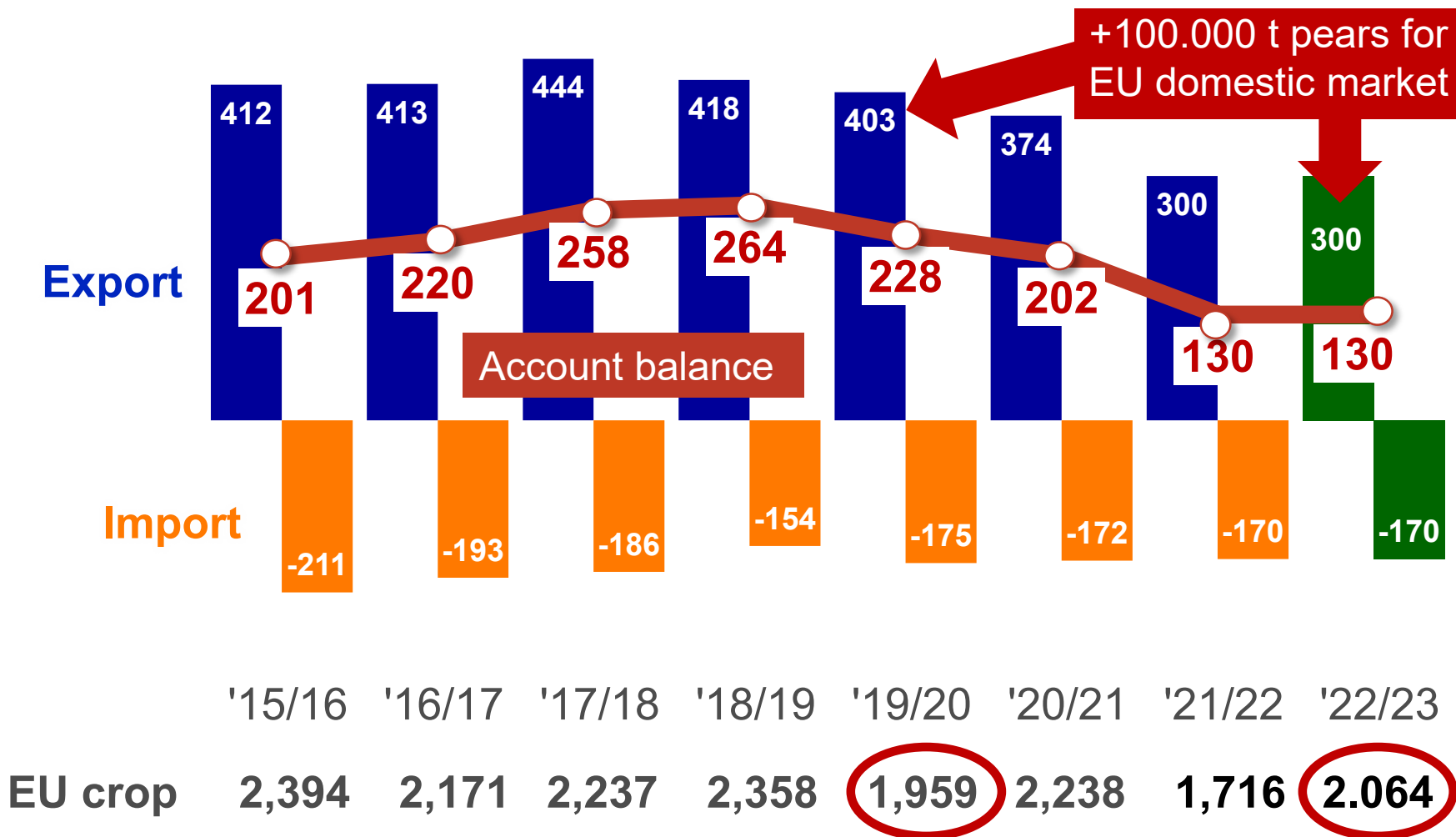
Monthly pear sales (retail) in Germany, France and Italy, in tons



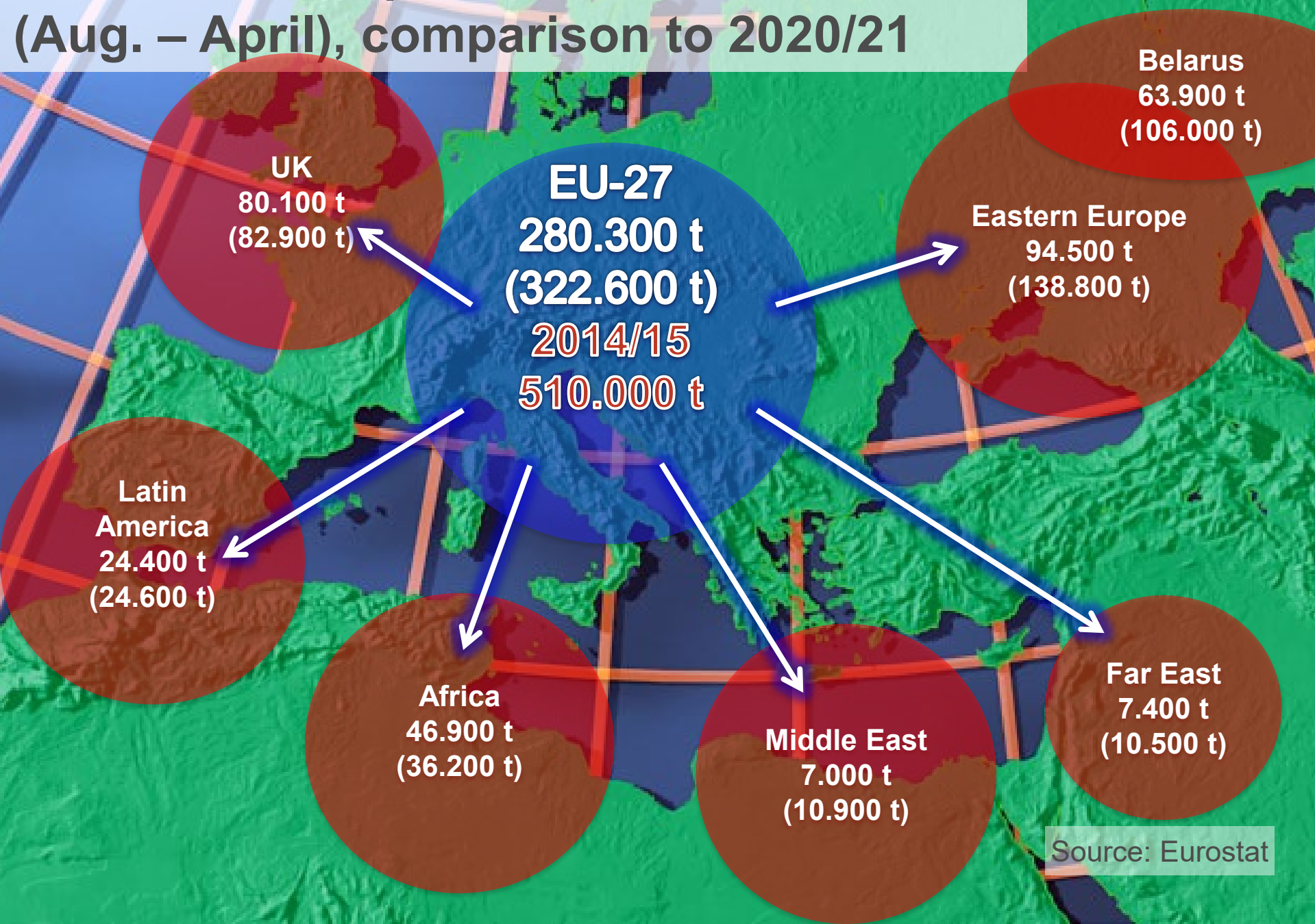
More exports necessary

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Current account balance for EU pears (August to July in 1,000 tons)



EU 27 - Pear exports in 2021/22 (Aug. – April), comparison to 2020/21



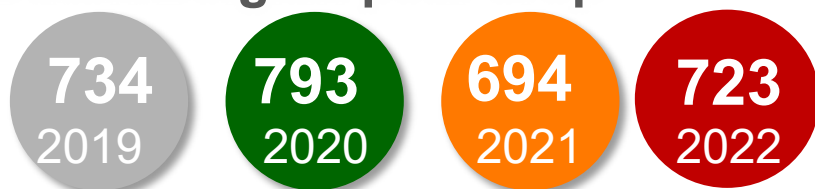
Source: Eurostat

Since February missing exports to the East

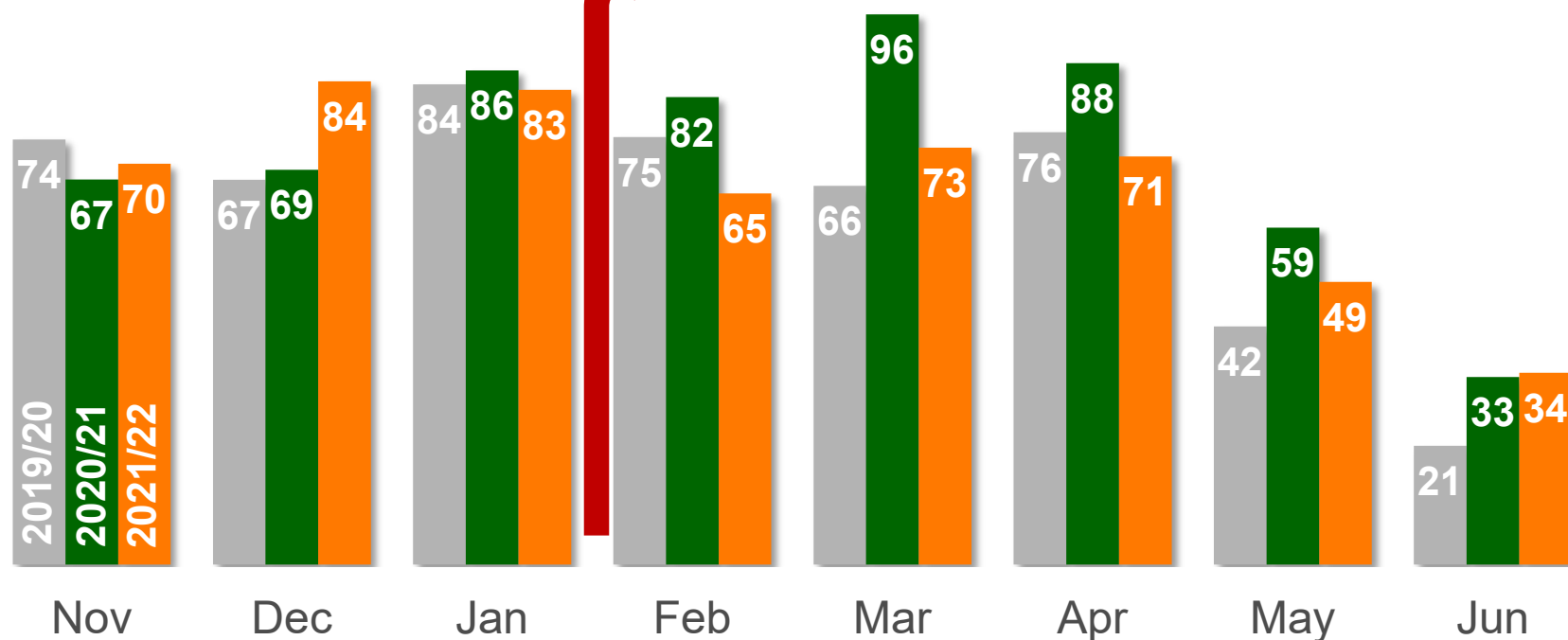


Monthly movement Dutch/Belgian pears, in 1,000 t

Dutch/Belgian pear crop



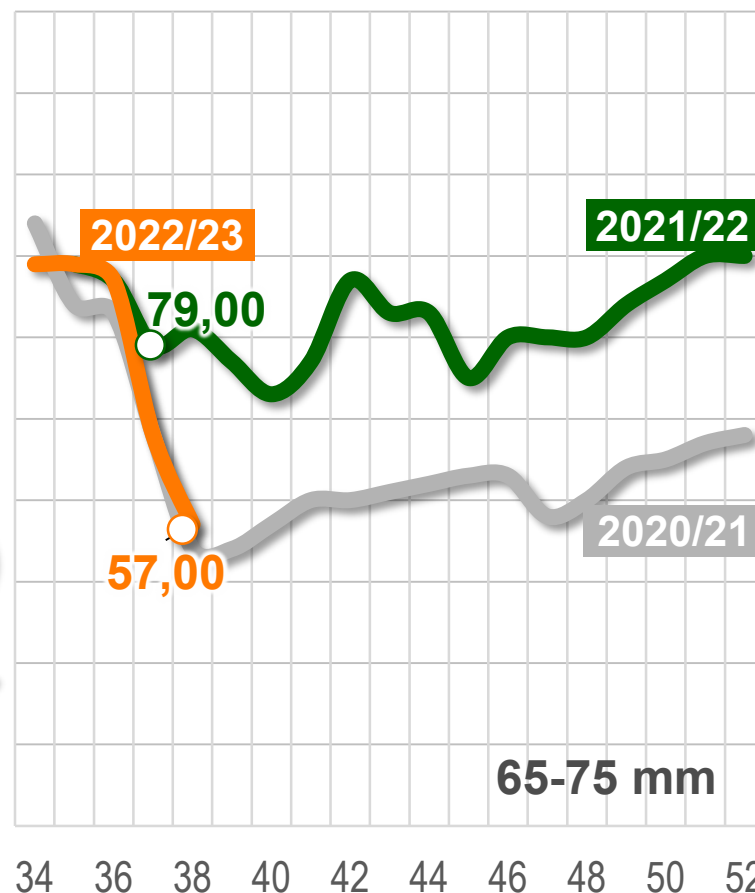
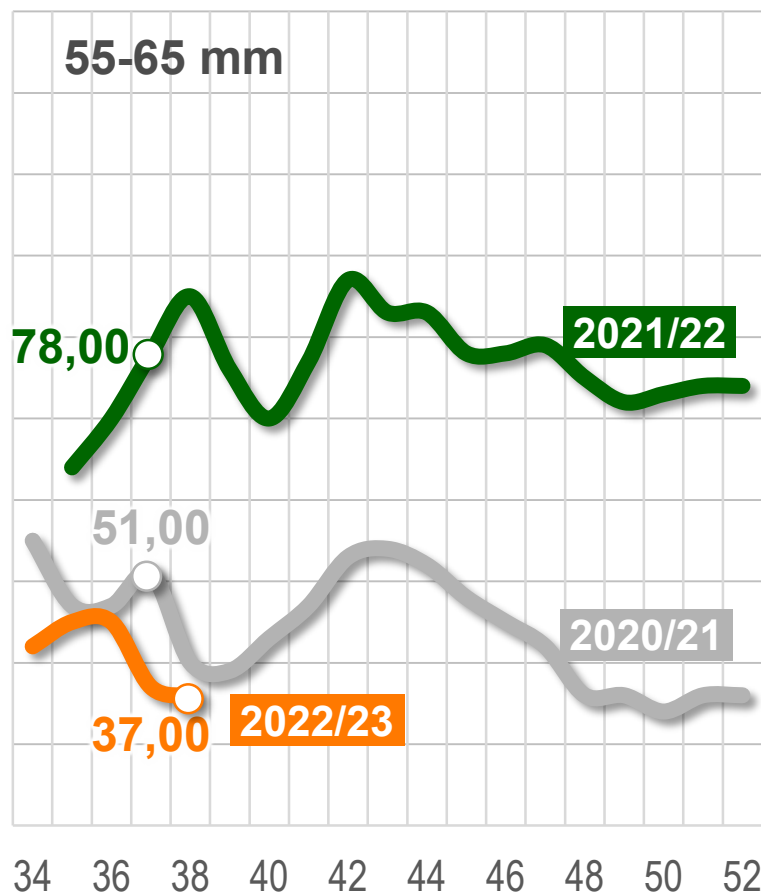
Missing exports to Eastern Europe



Belgian Conference – Price development



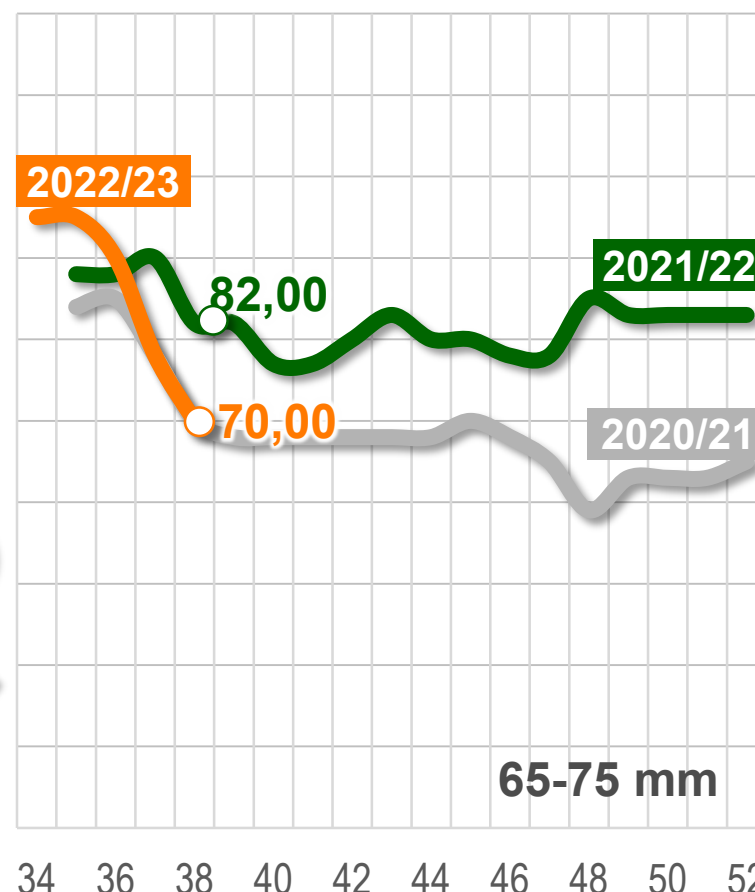
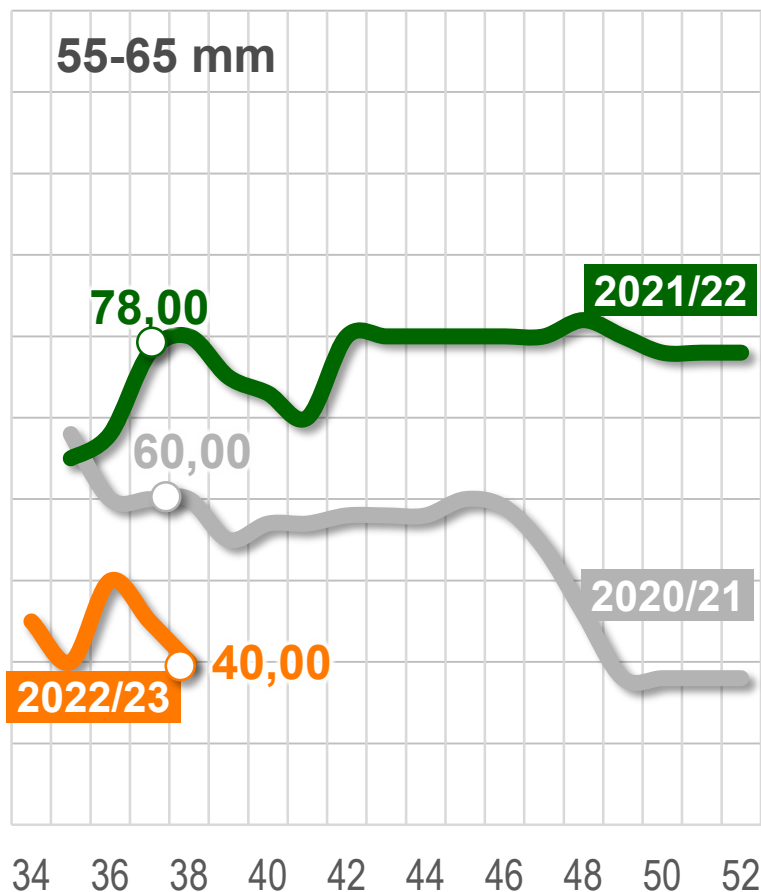
Weekly price at region, class I, in EUR/100 kg



Dutch Conference – Price development

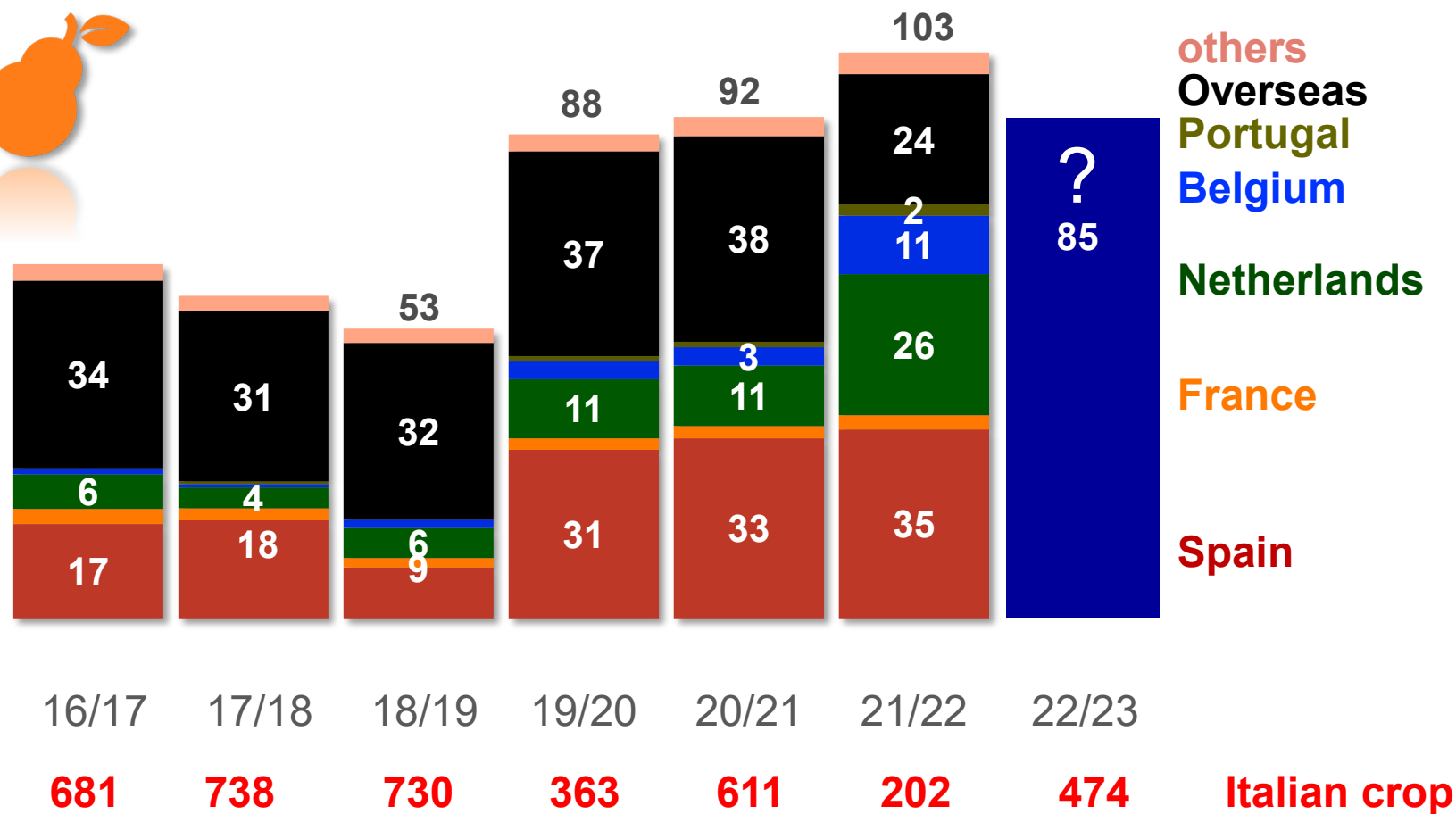


Weekly prices at region, class I, in EUR/100 kg



Record imports, Benelux profited

Italian pear imports, August to April, in 1,000 t



Strong increasing volume to 2025

European pear production, new varieties in tons



Variety/brand	2018	2020	2021	2022f	2025f
Xenia	8.550	13.750	16.200	16.700	27.900
Celina/QTee	2.100	8.300	9.000	9.000	22.500
Cipuna/Migo	5.000	7.000	8.000	9.000	12.000
Sweet Sensation	7.000	9.500	9.000	10.250	11.500
Gepa/Early Desire		2.000	2.500	2.500	5.000
Red Conference		500	1.000	1.000	3.000
CH 201/Fred		100	200	700	7.500
Total	22.650	41.150	45.900	49.150	89.400

Lower Abate Fetel crop – Chance for Club varieties in the top price segment

Thanks a lot for your attention.

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