



# Apples and pear crop 2022/2023 season

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WAPA

World Apples and Pears Association

MARKET OBSERVATORY – PIP FRUIT – 26 September 2022



# WAPA –World Apples and Pear Association

- ✓ Association grouping the 20 leading producing countries from the Northern and Southern Hemisphere
- ✓ Created in 2001 - Secretariat based in Brussels
- ✓ Governance:
  - ✓ President : Dominik Wozniak , TRSK (Polish Dwarf Fruit Orchards Association)
  - ✓ Vice-President: Jeff Correa , USA Pears
- ✓ Platform for the apples and pears growers:
  - ✓ Exchange on matters of common concerns such as: production , R&I, promotion and marketing , business data
  - ✓ Organiser of Prognosfruit



# World apples and pears production: China on the lead

## Apples: > 80 Mio T

tons						
#	Country	2016	2017	2018	2019	2020
1	China	40,394,483	41,391,451	39,235,019	42,426,578	40,501,041
2	USA	5,214,040	5,240,670	4,644,790	5,028,526	4,650,684
3	Turkey	2,925,828	3,032,164	3,625,960	3,618,752	4,300,486
4	Poland	3,604,271	2,441,393	3,999,520	3,080,600	3,554,300
5	India	2,521,000	2,265,000	2,327,000	2,316,000	2,734,000
6	Italy	2,455,616	1,921,272	2,466,990	2,303,690	2,462,440
7	Iran	2,096,749	2,398,831	1,936,697	2,241,124	2,206,723
8	Russia	1,701,100	1,493,600	1,859,400	1,950,800	2,040,700
9	France	1,823,123	1,695,949	1,740,350	1,753,500	1,619,880
10	Chile	1,707,557	1,741,845	1,684,343	1,602,722	1,619,575
11	Uzbekistan	1,441,566	1,028,796	1,130,335	1,124,017	1,148,455
12	Ukraine	1,099,240	1,076,180	1,462,360	1,153,970	1,114,570
13	Germany	1,032,913	596,666	1,198,520	991,450	1,023,320
14	South Africa	916,143	929,028	829,636	891,979	992,975
15	Brazil	1,055,383	1,307,642	1,203,007	1,222,949	983,247
16	North Korea	783,182	804,051	816,569	801,267	807,295
17	Morocco	406,379	820,547	696,950	809,762	778,866
18	Japan	765,000	735,200	756,100	701,600	720,405
19	Mexico	716,931	714,149	659,692	761,483	714,203
20	Egypt	754,846	716,271	716,148	701,435	697,936
21	Pakistan	669,912	564,693	543,645	603,922	625,372
22	Algeria	500,855	494,239	487,808	558,830	566,824
23	New Zealand	550,000	470,000	480,000	557,680	562,058
24	Romania	467,259	348,656	634,770	492,700	537,470
25	Argentina	458,908	458,908	510,478	537,640	535,797

## Pears :> 30 Mio T

tons						
#	Country	2016	2017	2018	2019	2020
1	China	16,074,424	16,527,694	16,196,649	17,404,532	16,101,450
2	Italy	701,928	772,578	752,590	429,290	619,470
3	USA	682,061	669,000	730,740	648,637	609,628
4	Argentina	522,414	517,754	565,697	600,000	600,000
5	Turkey	472,250	503,004	519,451	530,723	545,569
6	South Africa	423,180	416,215	397,555	407,212	431,000
7	Netherlands	374,000	330,000	402,200	373,000	400,000
8	Belgium	331,550	301,818	368,830	332,420	392,590
9	Spain	349,247	360,957	332,320	330,670	323,730
10	India	323,000	346,000	318,000	300,000	306,000
11	Chile	292,630	297,850	280,599	254,250	244,995
12	Japan	278,100	274,500	258,700	238,600	198,200
13	Algeria	211,951	236,982	200,176	223,467	154,861
14	Ukraine	156,000	165,440	183,170	155,300	152,290
15	North Korea	145,917	147,861	148,801	149,727	150,653
16	France	129,150	130,153	129,490	119,830	137,930
17	South Korea	238,014	265,757	203,166	200,732	132,580
18	Portugal	137,805	202,277	161,350	198,470	131,000
19	Iran	80,576	93,594	92,281	106,785	124,925
20	Uzbekistan	99,092	104,916	98,353	101,858	109,330
21	Taiwan, Province of	111,424	117,694	118,649	91,032	101,450
22	Australia	104,928	96,741	103,748	80,353	84,206
23	Greece	99,839	100,027	77,020	75,770	81,330
24	Russia	60,700	53,300	66,300	69,600	72,800
25	Austria	23,450	46,111	111,340	32,730	70,850



# Background to the season 2022/2023

A season 2022/2023 driven by many climatic havocs and uncertainties

- Post covid environment
  - Logistics hurdles for sea transportation and high logistics costs
  - Controls in port and port congestion
  - Lack of seasonal workers and truck drivers in many places
- Climatic conditions
  - Late frost and snow ( China and USA)
  - Summer heat wave and drought ( European Union)
  - Difficulties to have clear overview of final packhouse for the forecast ( sizes, sunburn,...)
- Geopolitical turmoil from the war in Ukraine
  - Rising energy costs
  - Rising production input costs
  - Household economic uncertainties

# European Union apples

## First update of European apples crop

APPLES EU	2020	2021	2022	VAR in %	VAR in T
AUSTRIA	126	120	148	148	0%
BELGIUM	168	250	219	215	-2%
CROATIA	55	65	57	57	0%
CZECH REPUBLIC	118	110	127	140	10%
DENMARK	24	18	24	24	0%
FRANCE	1.337	1.383	1.468	1.321	-10%
GERMANY	1.023	1.005	1.067	1.000	-6%
GREECE	280	246	294	294	0%
HUNGARY	350	520	350	350	0%
ITALY	2.124	2.053	2.150	2.079	-3%
LATVIA	14	8	8	8	0%
LITHUANIA	60	32	25	25	0%
NETHERLANDS	220	243	245	240	-2%
POLAND	3.410	4.300	4.495	4.750	6%
PORTUGAL	278	368	294	280	-5%
ROMANIA	384	444	410	410	0%
SLOVAKIA	30	31	34	34	0%
SLOVENIA	46	44	47	38	-19%
SPAIN	425	563	431	400	-7%
SWEDEN	31	27	30	30	0%
UK	196	186	245	233	-5%
<b>TOTAL</b>	<b>10.699</b>	<b>12.016</b>	<b>12.168</b>	<b>12.076</b>	<b>-1%</b>

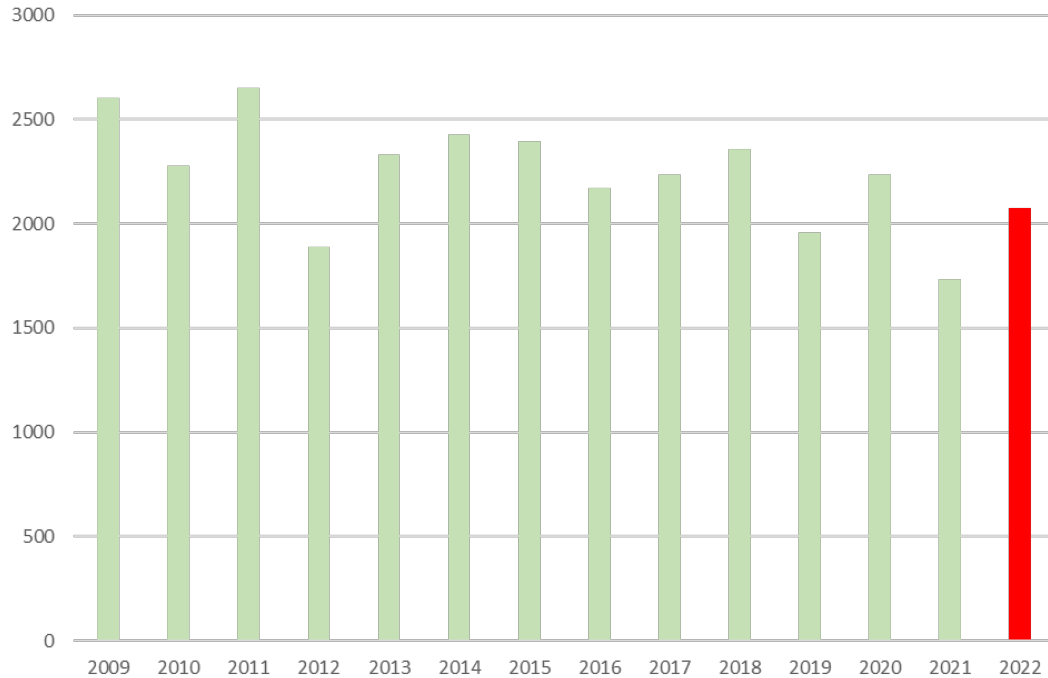
## More update expected

- End of September /early October :
  - additional decrease by 5 to 10%?
  - difficulty to assess volume that will not be harvested due to cost, lack of market perspective or labour shortage
  - preference for harvesting higher quality varieties
  - first pears update in figures
- Late November , once all harvest are finalized
- February 2023 confirmation of data



# European Union pears

Pears :2,078,000 T



Partial recovery after last year peak low crop – but downwards revision still likely for this season

## Pears by varieties and countries

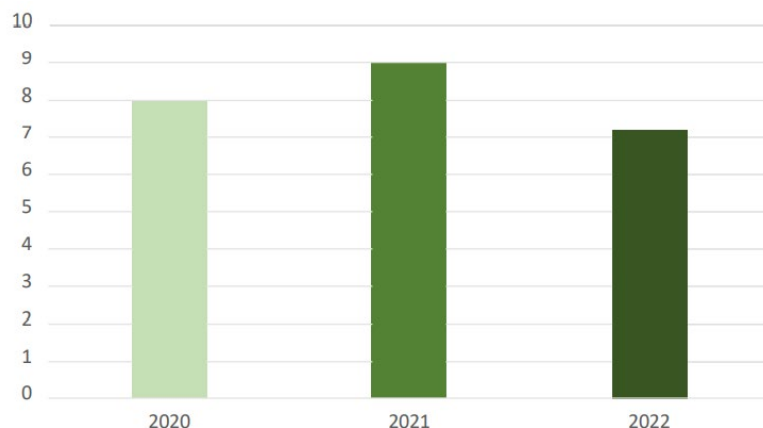
Country in 000 HA	2019	2020	2021	2022
BE	332	393	356	366
CR	3	2	2	2
CZ	6	6	7	8
DE	42	39	37	37
DK	4	6	6	7
ES	313	307	309	256
FR	121	133	58	137
GR	58	80	67	101
HU	32	16	16	17
IT	363	611	202	474
LV	1	1	1	1
NL	373	400	340	368
PL	70	65	70	95
PT	202	139	225	167
RO	18	19	21	21
SE	1	2	2	2
SK	1	1	1	1
SL	1	1	1	2
UK	20	17	15	16
TOTAL	1.961	2.238	1.736	2.078

Varieties	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	increase in 000 T
Conference	894	952	967	908	871	988	892	984	877	935	58
Abate	304	358	333	296	328	318	140	247	53	194	141
Williams BC	283	278	283	261	263	272	200	257	140	237	97
Rocha	162	203	134	113	186	142	202	139	226	168	-58
Coscia-Ercollini	80	66	79	67	79	70	63	73	55	51	-4
Guyot	80	67	74	59	65	58	58	55	35	43	8

# EU neighbourhood apples and pears

## Apples ( in 000 T )

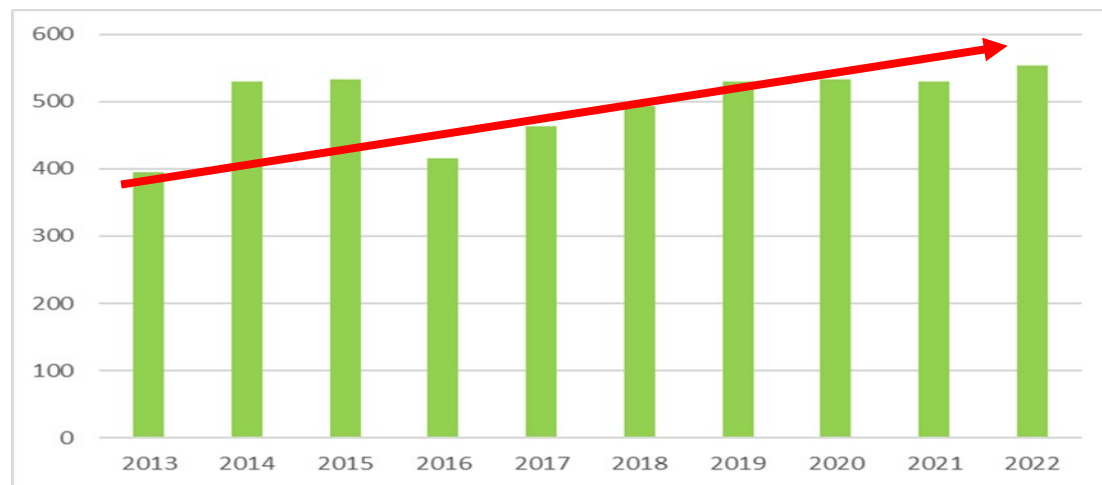
APPLES NEIGHBORHOOD	2020	2021	2022	VAR in %	VAR in T
SERBIA	506	515	453	-12%	-62
MOLDOVA	480	665	485	-27%	-180
RUSSIA	1.200	1.400	1.300	-7%	-100
UKRAINE	1.115	1.279	1.157	-10%	-122
TURKEY	4.000	4.402	4.660	6%	258
<b>TOTAL NEIGHBORHOOD</b>	<b>7.301</b>	<b>8.261</b>	<b>8.055</b>	<b>-3%</b>	<b>-206</b>



## Pears (in 000 T)

PEARS NEIGHBORHOOD	2020	2021	2022	VAR in %
SERBIA	55	49	58	18%
MOLDOVA	5	6	5	-17%
RUSSIA	25	28	20	-29%
UKRAINE	151	175	157	-10%
TURKEY	533	530	554	5%
<b>TOTAL NEIGHBORHOOD</b>	<b>769</b>	<b>788</b>	<b>794</b>	<b>1%</b>

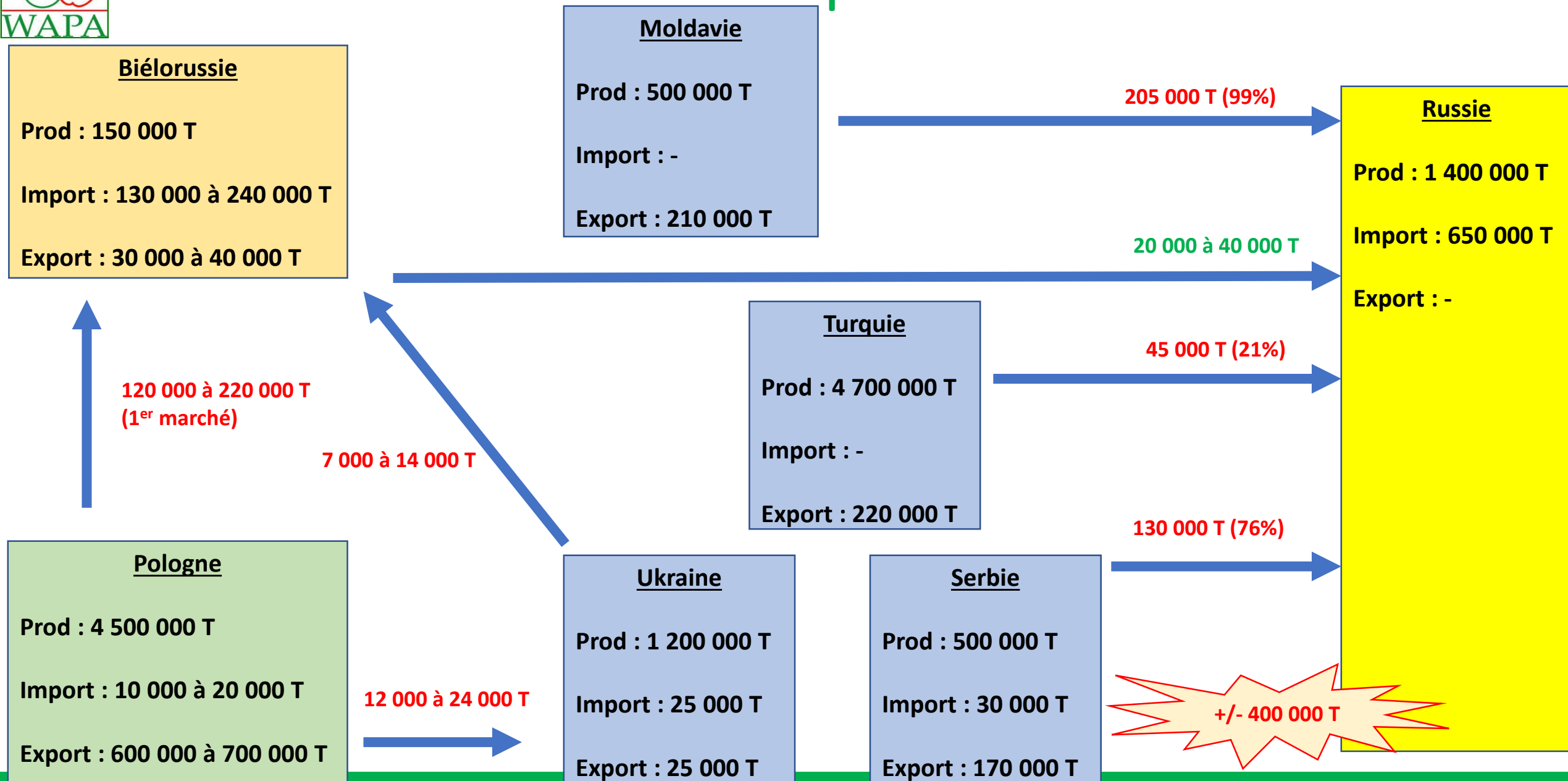
## Pears : Turkey is the leader with 550,000T



Russia : new plantings in 000 Ha driven by States subsidies  
Lower yield due to rising costs and lack of long term storage space



# Les interactions pommes à l'Est



# Apples in Central Asia and Caucasus

## Central Asia

- Area is expanding quickly but lack of knowledge makes many of these new projects expensive failures
- After a very low harvest in 2021 due to bad weather in 2022 harvest was expected to be record high...
- It might still be record high, around **2mn tonnes**, but in many production regions it has been 45-49 degrees C in the recent 7 days, which means apple quality and storability will be very low...
- ...Which means very low prices until December 2022 and then a potential sharp increase of prices and imports to record **130-140 K (+25K)** tonnes, mostly to Uzbekistan and Kazakhstan.

Central Asia	in T
Uzbekistan	1,250,000
Azerbaijan	300,000
Tajikistan	250,000
Kazakhstan	200,000
kyrgyzstan	150,000
Armenia	80,000
Turkmenistan	65,000

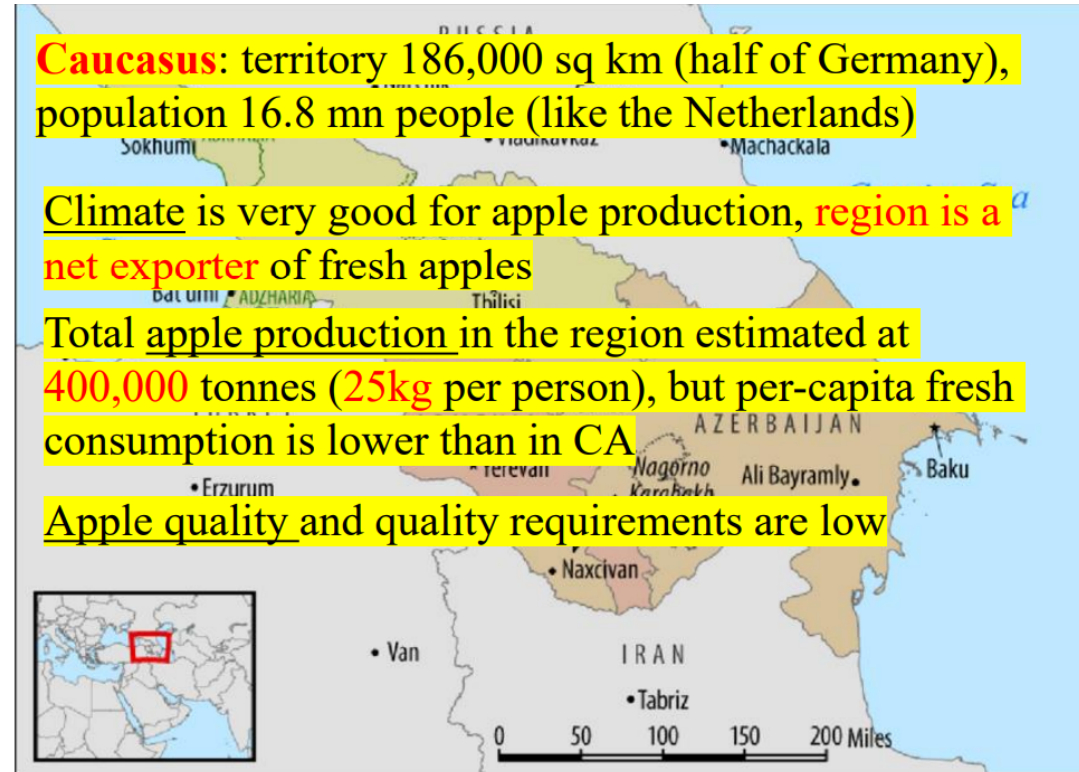
## Caucasus

**Caucasus:** territory 186,000 sq km (half of Germany), population 16.8 mn people (like the Netherlands)

Climate is very good for apple production, **region is a net exporter** of fresh apples

Total apple production in the region estimated at **400,000 tonnes (25kg per person)**, but per-capita fresh consumption is lower than in CA

Apple quality and quality requirements are low



Iran : production moving to 4 Mio T becoming a new player on markets like Russia and India



# United States of America : apples

## Apples production by States

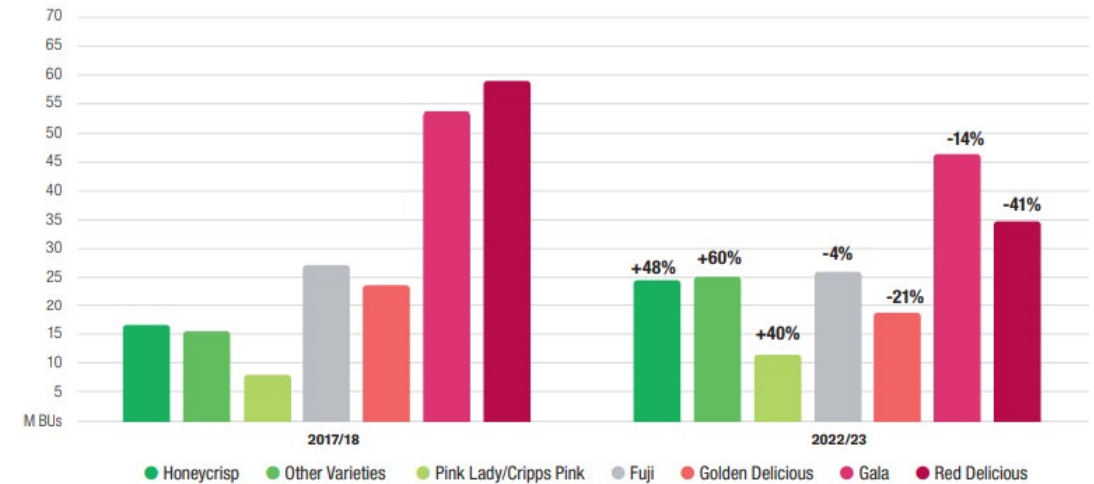
USA, by major apple producing state (US Apple Estimate)

x 1000 tons								
State	2017	2018	2019	2020	2021	F2022	-1	-2
New York	544	633	550	628	606	614	1%	3%
Pennsylvania	222	221	200	189	252	209	-17%	-2%
Virginia	100	93	100	74	74	93	25%	13%
Michigan	363	476	500	420	297	551	86%	36%
Washington	3,039	3,039	3,449	3,137	3,058	2,613	-15%	-19%
California	104	113	112	123	98	105	7%	-6%
Oregon	79	77	100	79	70	70	0%	-16%
Other States	285	288	297	275	264	257	-3%	-8%
<b>Total*</b>	<b>4,736</b>	<b>4,940</b>	<b>5,308</b>	<b>4,926</b>	<b>4,719</b>	<b>4,511</b>	<b>-4%</b>	<b>-10%</b>

(1) Percentage difference between F2022 and 2021

(2) Percentage difference between F2022 and the average of 2021 - 2020 - 2019

## Apples production by varieties



2021/22	Regular	Organic	Difference
<b>Median</b>	<b>\$ 1.35</b>	<b>\$ 2.12</b>	<b>\$ 0.71</b>
Honeycrisp	\$ 2.30	\$ 3.31	\$ 1.01
Granny Smith	\$ 1.58	\$ 2.14	\$ 0.56
Gala	\$ 1.50	\$ 2.12	\$ 0.62
Pink Lady/Cripps Pink	\$ 1.49	\$ 2.20	\$ 0.71
Fuji	\$ 1.41	\$ 2.09	\$ 0.68
Braeburn	\$ 1.35	N/A	N/A
Red Delicious	\$ 1.32	\$ 2.08	\$ 0.76
McIntosh	\$ 1.32	N/A	N/A
Golden Delicious	\$ 1.26	\$ 2.34	\$ 1.08
Jonagold	\$ 1.18	\$ 1.99	\$ 0.81
Rome	\$ 1.09	\$ 1.69	\$ 0.60

Sources: USDA, Agricultural Marketing Service; USApple

Note: Prices represent national averages in \$/LB.



# United States of America : apples and pears

## Pear production

### USA

x 1000 tons

Variety	2013	2014	2015	2016	2017	2018	2019	2020	2021	F2022	(1)	(2)
Anjou	232	224	194	166	169	187	190	158	170	176	3	2
Bartletts / William BC	363	336	347	333	303	294	286	253	268	257	-4	-5
Bosc	75	62	70	70	53	70	49	54	57	56	-2	4
Doyenne du Comice	6	5	4	6	3	4	3	3	3	3	-1	-5
Red Anjou	22	22	19	20	20	19	22	16	18	20	11	7
Seckel	1	1	1	1	1	1	1	1	1	0	-28	-30
Other Reds	7	8	10	9	8	8	7	6	7	8	15	18
Other Varieties	6	5	3	4	3	4	3	2	2	3	48	19
<b>Total USA</b>	<b>711</b>	<b>663</b>	<b>648</b>	<b>608</b>	<b>561</b>	<b>587</b>	<b>559</b>	<b>493</b>	<b>525</b>	<b>522</b>	<b>-1</b>	<b>-1</b>

## Apples and Pears production

Main issues :

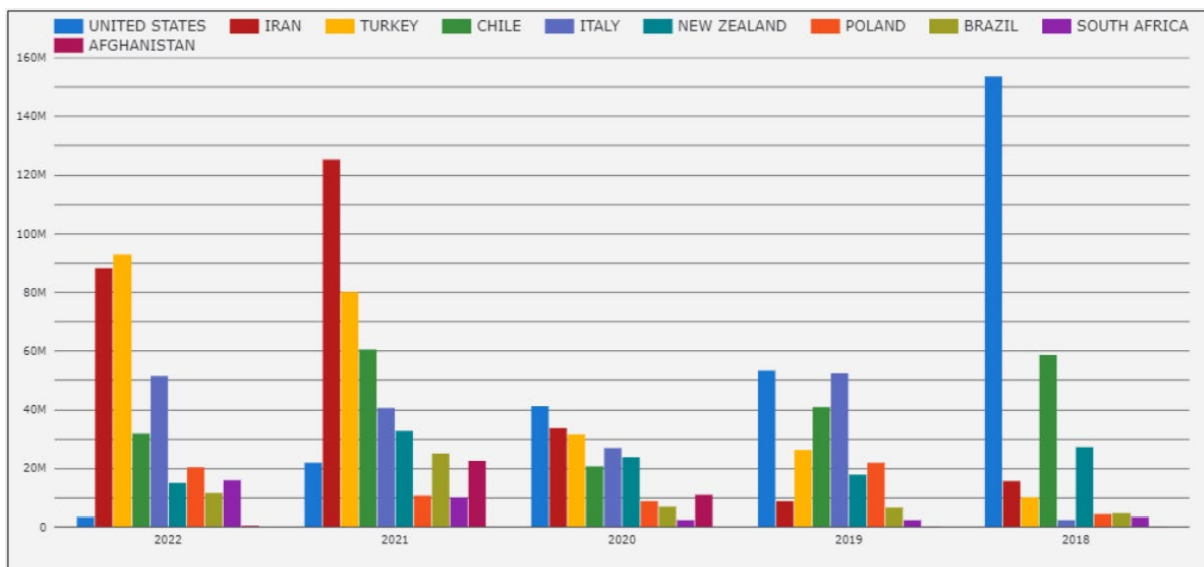
- Rising costs
- Access to labour
- Exports of apples and pears primarily focusing to Canada and Mexico
- Climatic havocs
- Yield to increase to stay competitive
- E-commerce at grocery growing but still small percentage (3%)



# India :apples and pears

## India: apples

India in 000T	2017	2018	2019	2020	2021	2022
Himachal Pradesh	446	368	715	407	700	750
Kashmir & Jammu	1.644	1.645	1.648	1.667	1.500	1.725
Uttarakhand						75
Arunachal Peadesh						10
<b>Total</b>	<b>2.090</b>	<b>2.013</b>	<b>2.363</b>	<b>2.074</b>	<b>2.200</b>	<b>2.475</b>



## India: pears

- Pears production : 90,000T
- Pear imports: 20,000 T

Year	QTY
2022	16710
2021	25636
2020	18220
2019	19816
2018	19065
2017	17658
2016	26626



# China: apples and pears

## Apples

China, by province (CFNA)

x 1000 tons						
Province	2019	2020*	2021	F2022	(1)	(2)
<b>Shaanxi</b>	11,356,000	11,852,100	12,444,705	11,200,235	-10%	-6%
<b>Shandong</b>	9,502,000	9,536,300	8,582,670	6,866,136	-20%	-25%
<b>Shanxi</b>	4,219,000	4,366,300	4,453,626	2,672,176	-40%	-39%
<b>Henan</b>	4,088,000	4,075,700	4,157,214	2,494,328	-40%	-39%
<b>Gansu</b>	3,045,000	3,859,800	3,666,810	2,566,767	-30%	-27%
<b>Liaoning</b>	2,488,000	2,673,200	2,114,800	1,480,360	-30%	-39%
<b>Hebei</b>	2,216,000	2,397,500	2,277,625	2,049,863	-10%	-11%
<b>Xinjiang</b>	1,707,000	1,840,200	1,895,406	1,705,865	-10%	-6%
<b>Sichuan</b>	765,000	807,500	815,575	840,042	3%	6%
<b>Yunnan</b>	550,000	605,800	617,916	636,453	3%	8%
<b>Jiangsu</b>	540,000	560,600	571,812	577,530	1%	4%
<b>Other</b>	1,949,000	1,491,000	4,375,241	2,999,364	-31%	15%
<b>Total</b>	<b>42,425,000</b>	<b>44,066,100</b>	<b>45,973,400</b>	<b>36,089,119</b>	<b>-22%</b>	<b>-20%</b>

## Pears

x 1000 ton

Province	2019	2020*	2021	F2022	(1)	(2)
<b>Hebei</b>	3,632,000	3,519,000	3,624,570	3,262,113	-10%	-9%
<b>Xinjiang</b>	1,217,000	1,544,700	1,560,147	1,606,951	3%	12%
<b>Henan</b>	1,374,700	1,381,600	1,409,232	1,127,386	-20%	-19%
<b>Liaoning</b>	1,305,600	1,329,500	1,356,090	1,084,872	-20%	-18%
<b>Anhui</b>	1,254,000	1,275,100	1,300,602	1,170,542	-10%	-8%
<b>Shandong</b>	1,042,400	1,110,900	1,155,336	982,036	-15%	-11%
<b>Shaanxi</b>	1,046,000	1,043,000	990,850	891,765	-10%	-13%
<b>Shanxi</b>	861,000	977,300	987,073	789,658	-20%	-16%
<b>Sichuan</b>	943,200	955,600	965,156	916,898	-5%	-4%
<b>Jiangsu</b>	778,600	783,500	799,170	679,295	-15%	-14%
<b>Other</b>	3,843,865	3,895,100	4,727,674	3,532,999	-25%	-15%
<b>Total</b>	<b>17,298,365</b>	<b>17,815,300</b>	<b>18,875,900</b>	<b>16,044,515</b>	<b>-15%</b>	<b>-13%</b>



# Apples and pears are nutritious: Saved the date !

## APPLES are a nutritious fruit:

- ✓ High in fibre
- ✓ Saturated fat free
- ✓ Naturally fat free
- ✓ Low fat food
- ✓ Naturally occurring sugars
- ✓ Naturally sodium free
- ✓ Contain fructose
- ✓ Naturally salt free



International apple day  
Saturday 19 November 2022

International pear day  
Saturday 3rd December 2022



## PEARS are a nutritious fruit:

- ✓ High in fibre
- ✓ Saturated fat free
- ✓ Naturally fat free
- ✓ Low fat food
- ✓ Naturally occurring sugars
- ✓ Naturally sodium free
- ✓ Contain fructose
- ✓ Naturally salt free





# Many thanks

[www.wapa-association.org](http://www.wapa-association.org)