Common Market Organisation (CMO)
Fruit and vegetables sector

Market situation for F&V in the EU

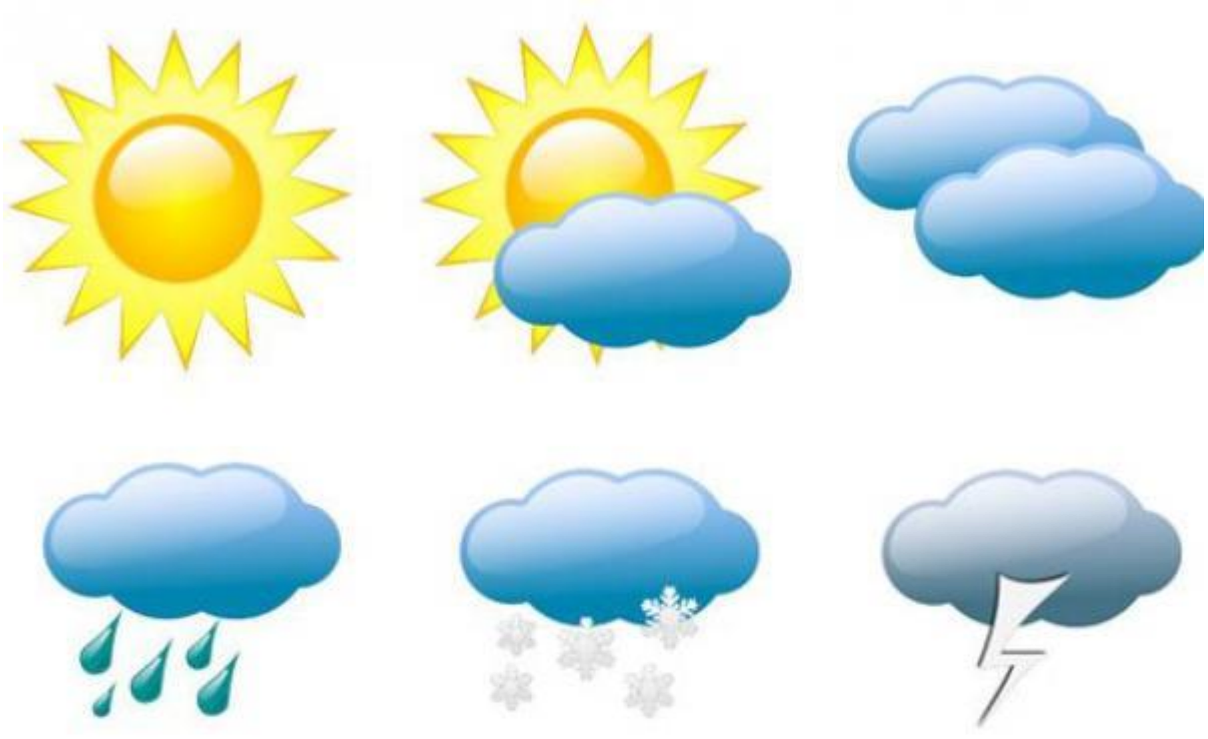
Unit G.2. - Wine, spirits, and horticultural products
DG Agriculture and Rural Development
European Commission

Civil Dialogue Group "Fruits & Vegetables" – 19 October 2018

Market situation for F&V in the EU

1. Market context
2. Vegetables
3. Fruit

1. Market context



1. Market context

- ***Feb/March 18:*** Cold snap – Limited impact (*early stone fruit)*
- ***Summer 18:***
  - Hailstorms South EU (*apples, plums, vineyards* IT; *stonefruit* ES)
  - Heat & drought Central-North EU

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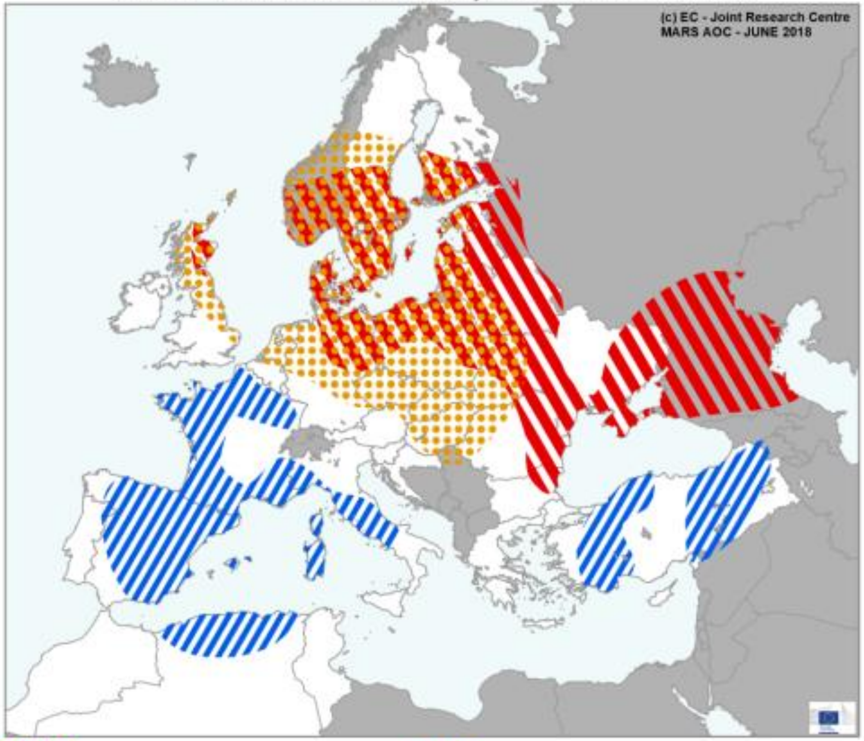
AREAS OF CONCERN - EXTREME WEATHER EVENTS

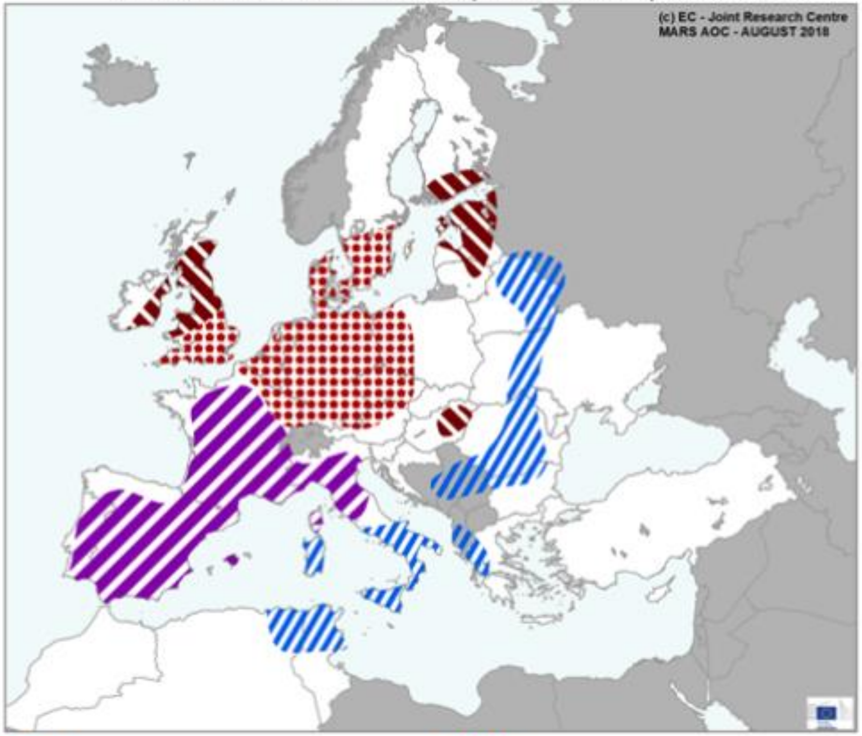
Based on weather data from 1 May 2018 until 22 June 2018



Rain surplus
Rain deficit
Temperature accumulation surplus

AREAS OF CONCERN - EXTREME WEATHER EVENTS

Based on weather data from 1 July 2018 until 1 September 2018



Hot and dry conditions
Drought
Rain surplus
Heat wave

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Impact summer heat & drought

Significant, alleviated with irrigation

Moderate *(fruit trees)*

Significant *(strawberries, berries)*

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Impact summer heat & drought

Impact summer heat & drought

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1. Market context

1. Market context

- ***China:***
  - ➢ US to impose additional tariff on imported F&V
  - ➢ Low apple crop forecasted (frost damage)
  - ➢ Opportunities for EU producers?
- ***Mercosur negotiations***: Uncertain final outcome
- **CETA Canada**: Surge in exports certain Member States

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2. Vegetables

- ES, IT: Moderate prices in the summer
- NL: Good prices until May, dropped in June (no Russia)
- FR: Low consumption and weak prices from April

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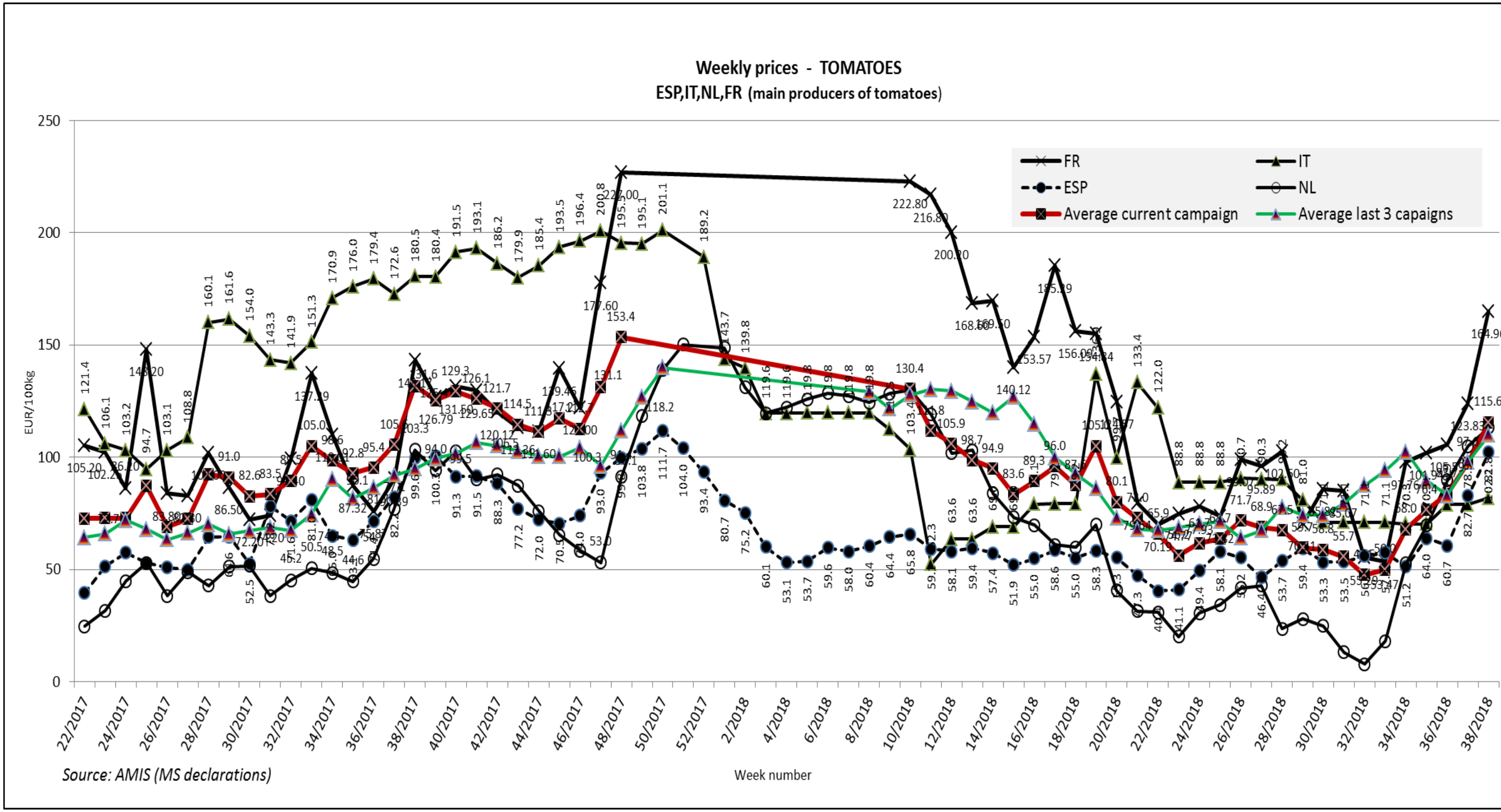
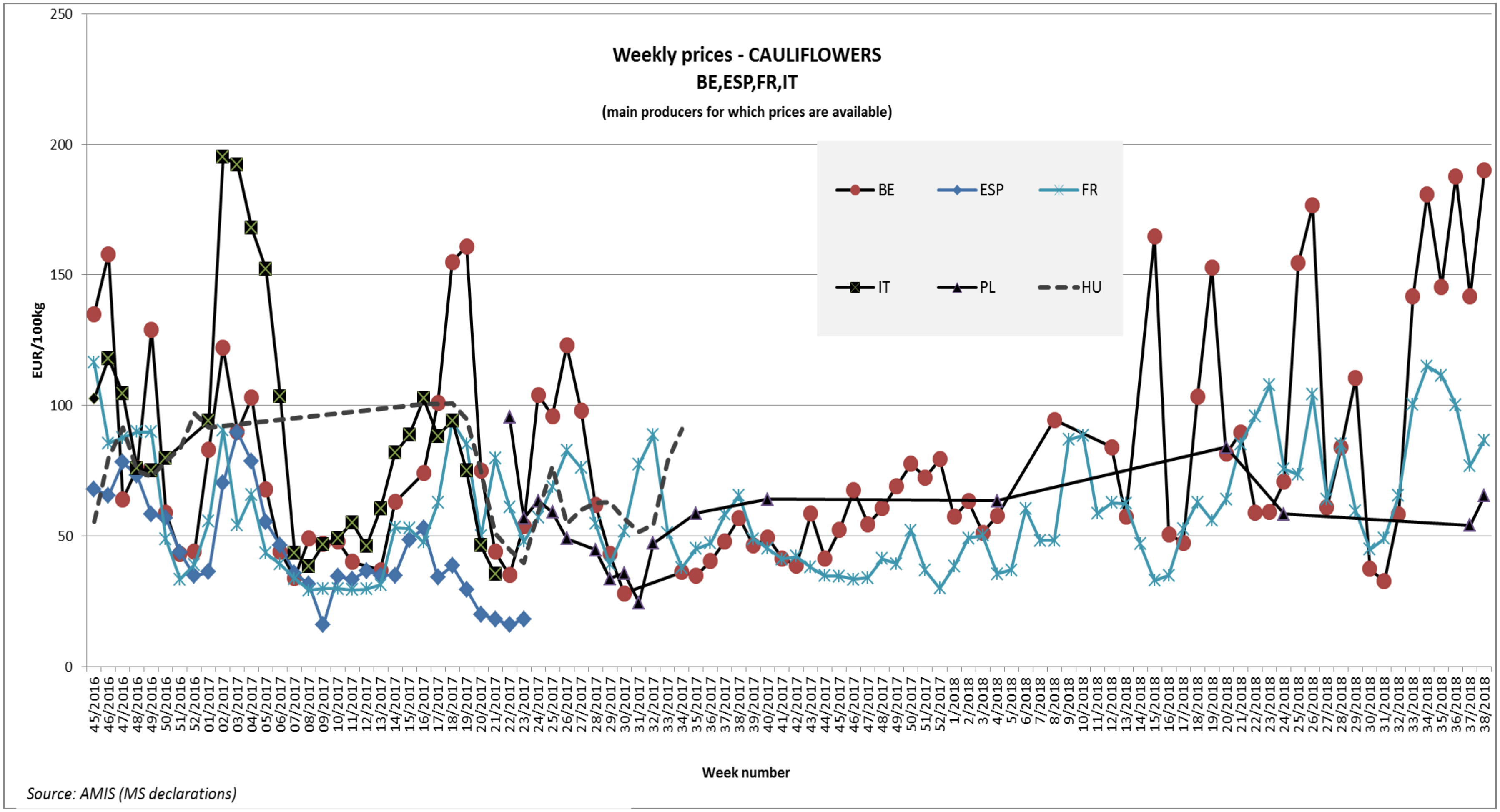
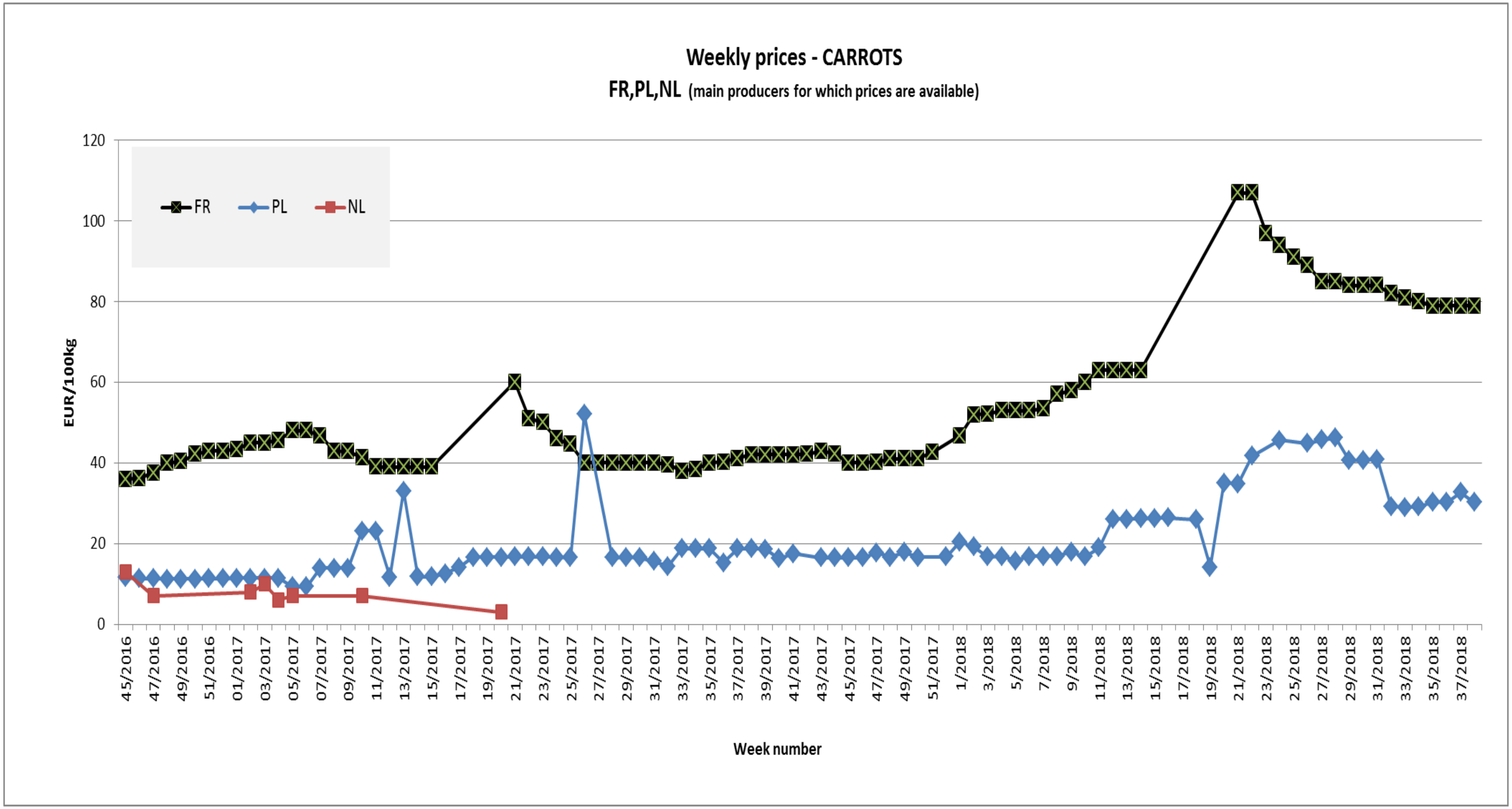


2. Vegetables

- Drought caused important production losses *(open-field)*
- Quality also deteriorated
- Shortage of supplies also for processing
- Uncertain impact products harvested in autumm/winter


Weekly prices - CAULIFLOWERS
BE,ESP,FR,IT
(main producers for which prices are available)
BE
ESP
FR
IT
PL
HU
EUR/100kg
250
200
150
100
50
0
Week number
Source: AMIS (MS declarations)


Weekly prices - CARROTS
FR,PL,NL (main producers for which prices are available)
FR
PL
NL
EUR/100kg
Week number
120
100
80
60
40
20
0
45/2016
47/2016
49/2016
51/2016
01/2017
03/2017
05/2017
07/2017
09/2017
11/2017
13/2017
15/2017
17/2017
19/2017
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35/2018
37/2018

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3. Fruit

- Abundant harvest initially forecasted
- Uncertain impact of drought on production
- Some production losses, smaller fruit sizes
- Quality possibly affected

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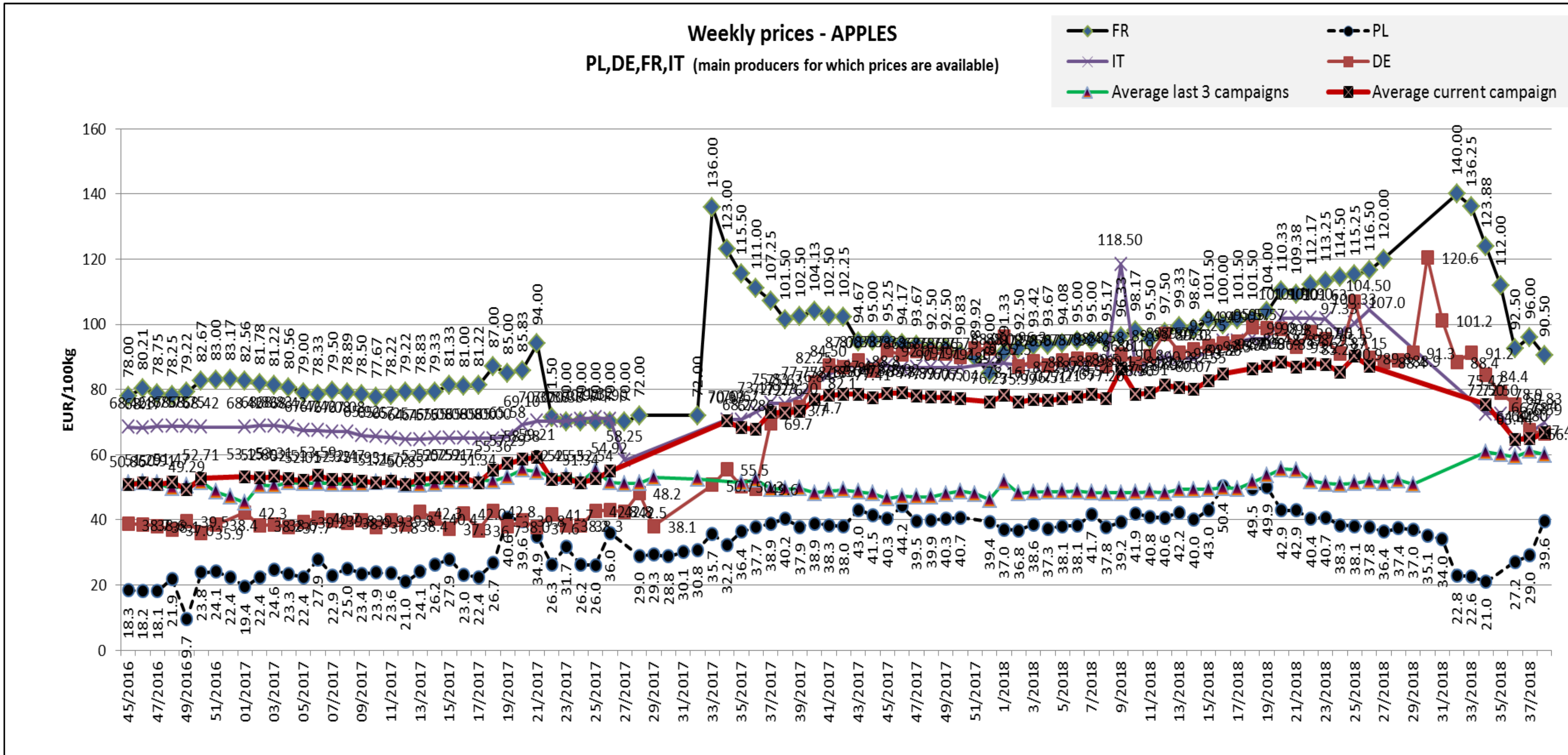
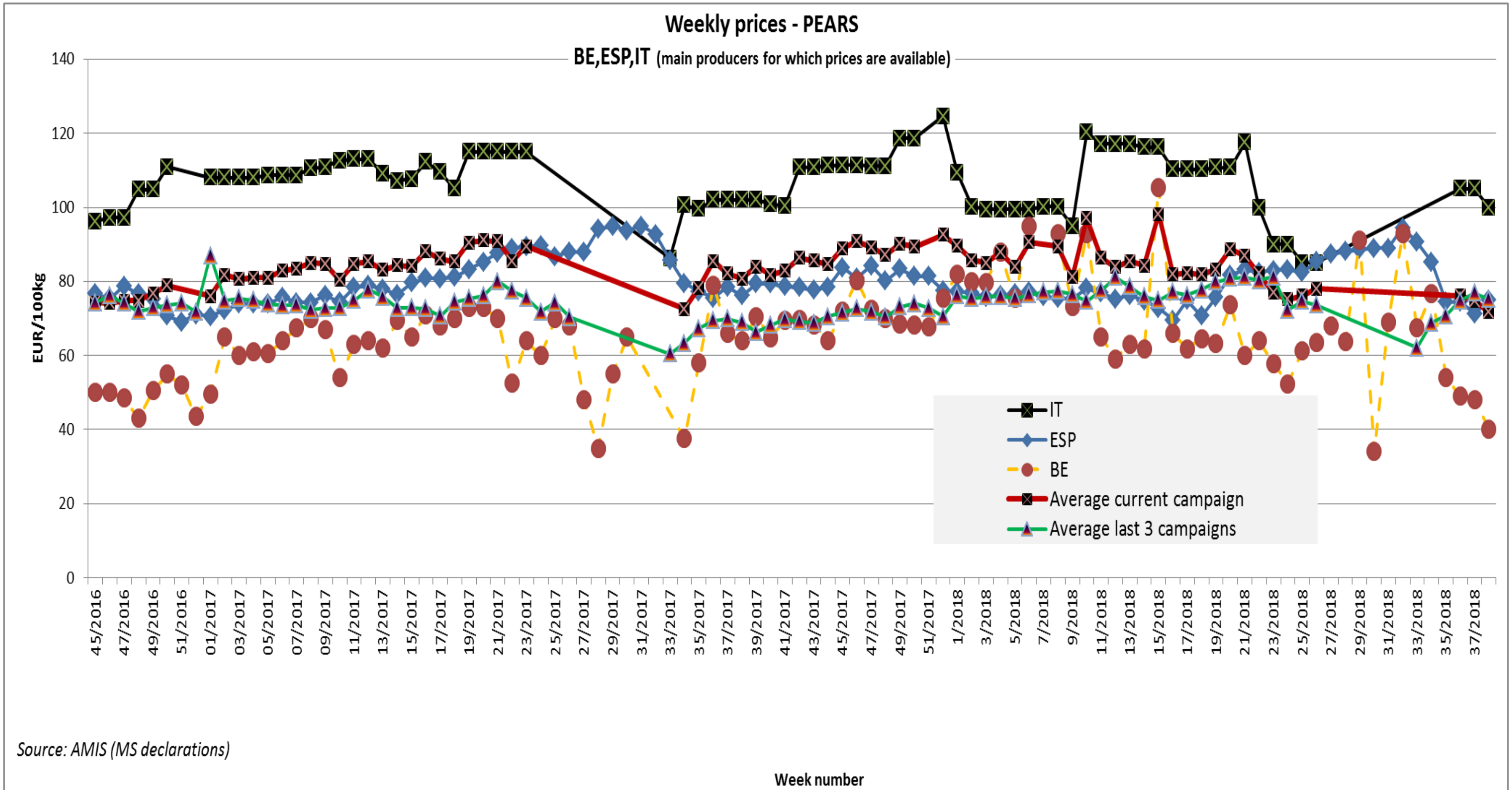


Source: AMIS (MS declarations)



Source: AMIS (MS declarations)

3. Fruits

- Abundant crop expected in Spain
- Lower volumes forecasted in Sicily

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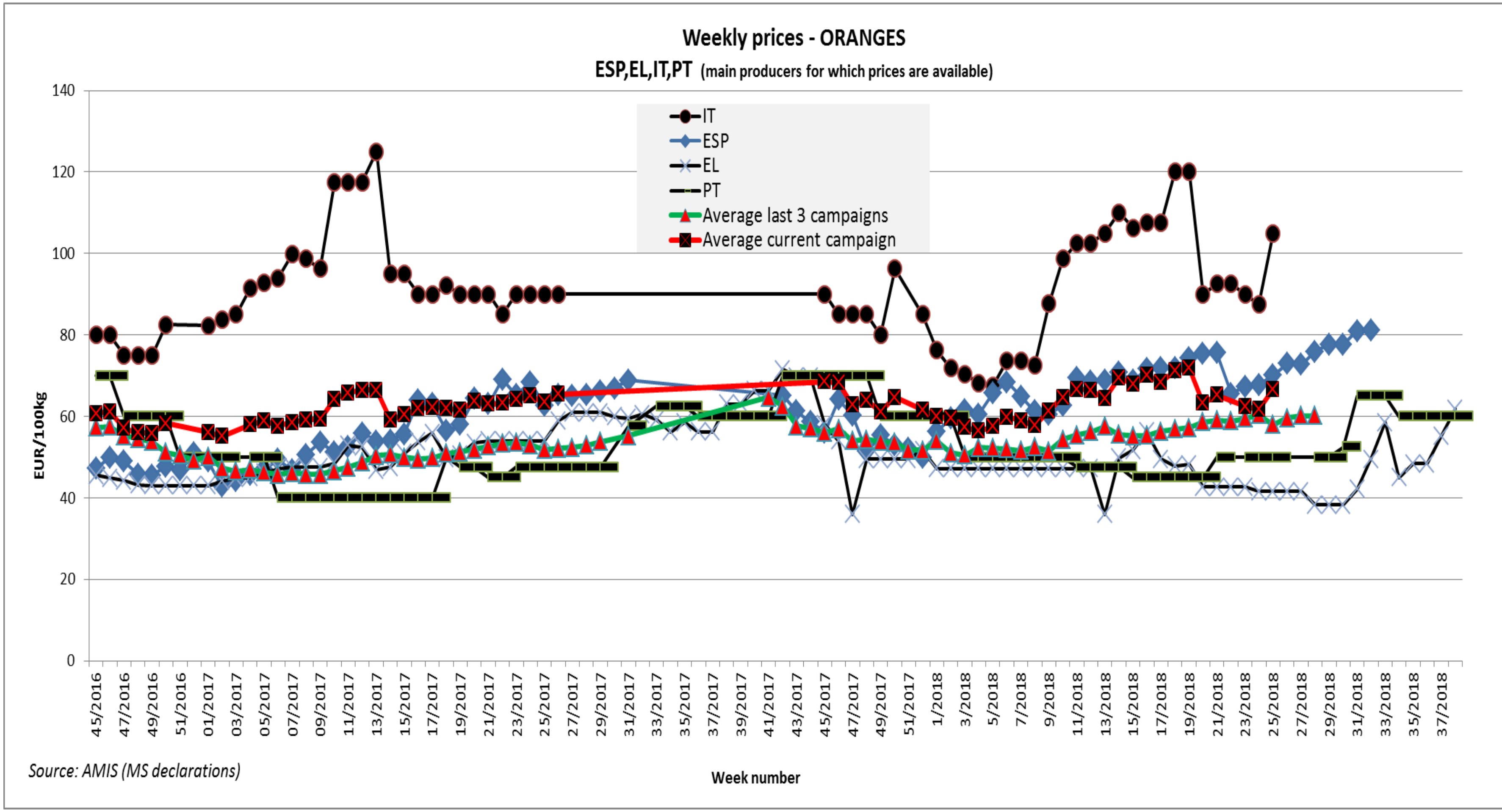
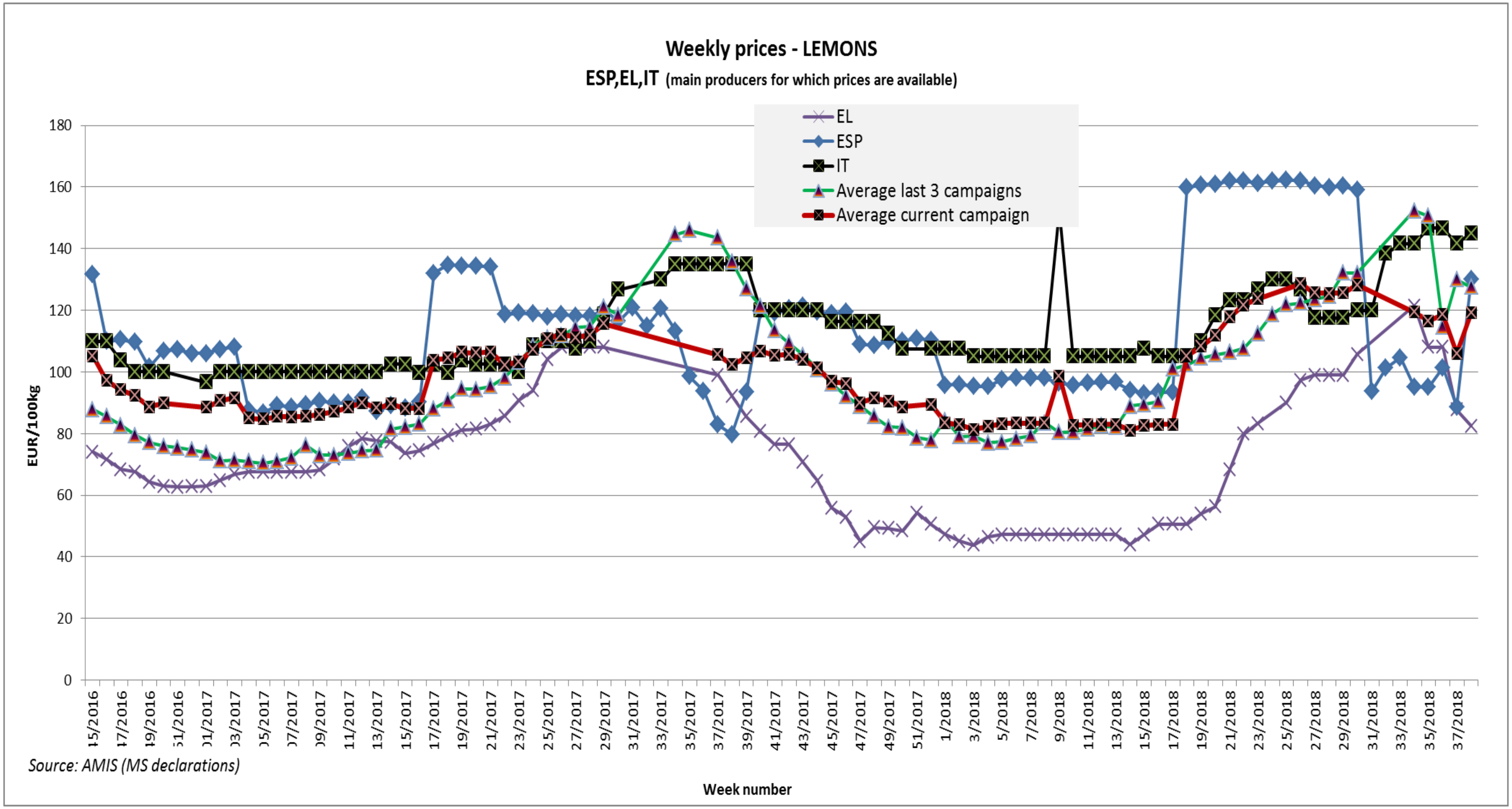
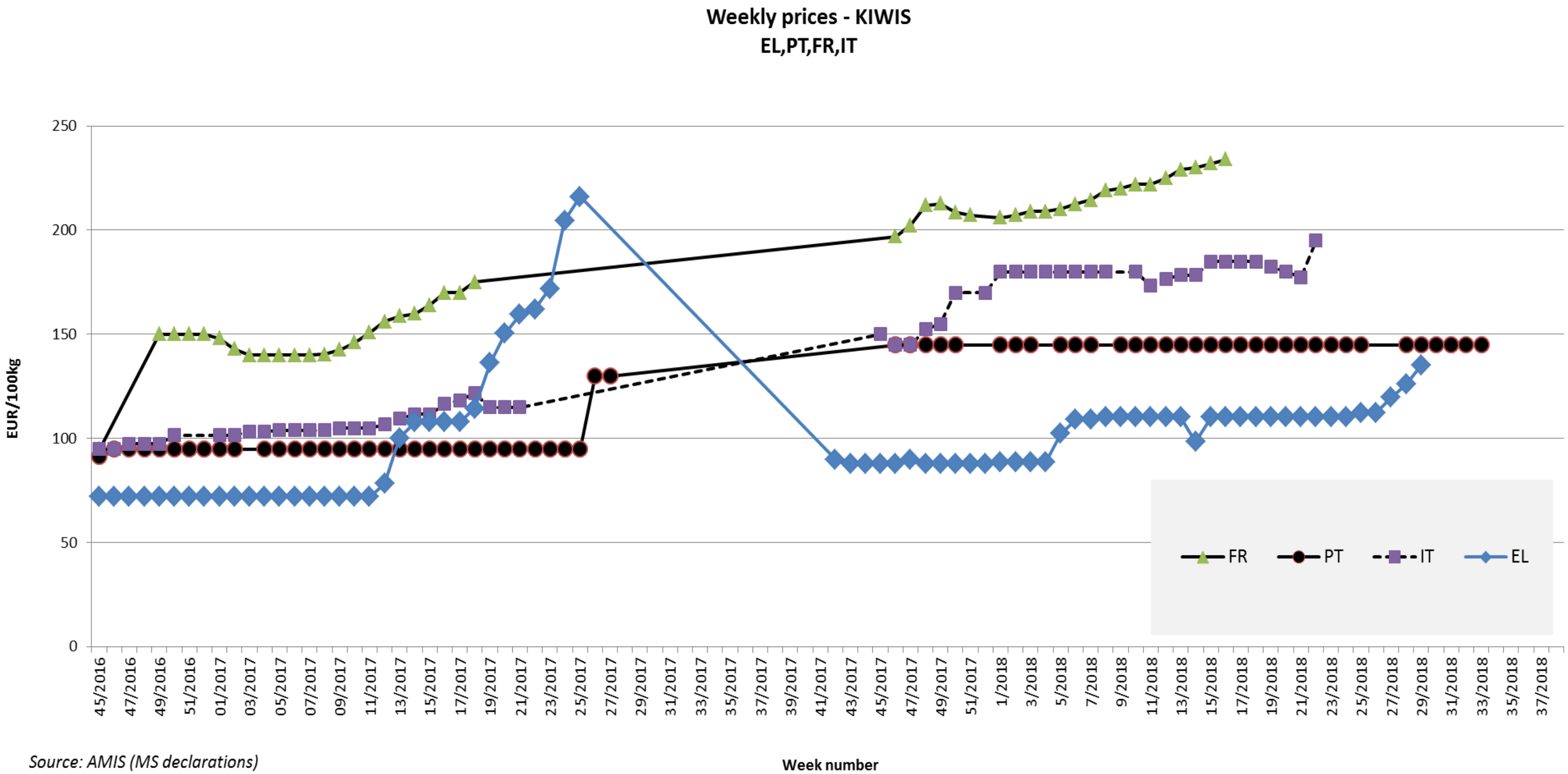



Weekly prices - LEMONS
ESP,EL,IT (main producers for which prices are available)
EL
ESP
IT
Average last 3 campaigns
Average current campaign
EUR/100kg
180
160
140
120
100
80
60
40
20
0
Week number
Source: AMIS (MS declarations)



Source: AMIS (MS declarations)

3. Fruits

- Cold snaps Feb/March damaged early fruit & delayed season
- Summer hailstorms affected late production in ES
- Low supplies but prices did not increase accordingly

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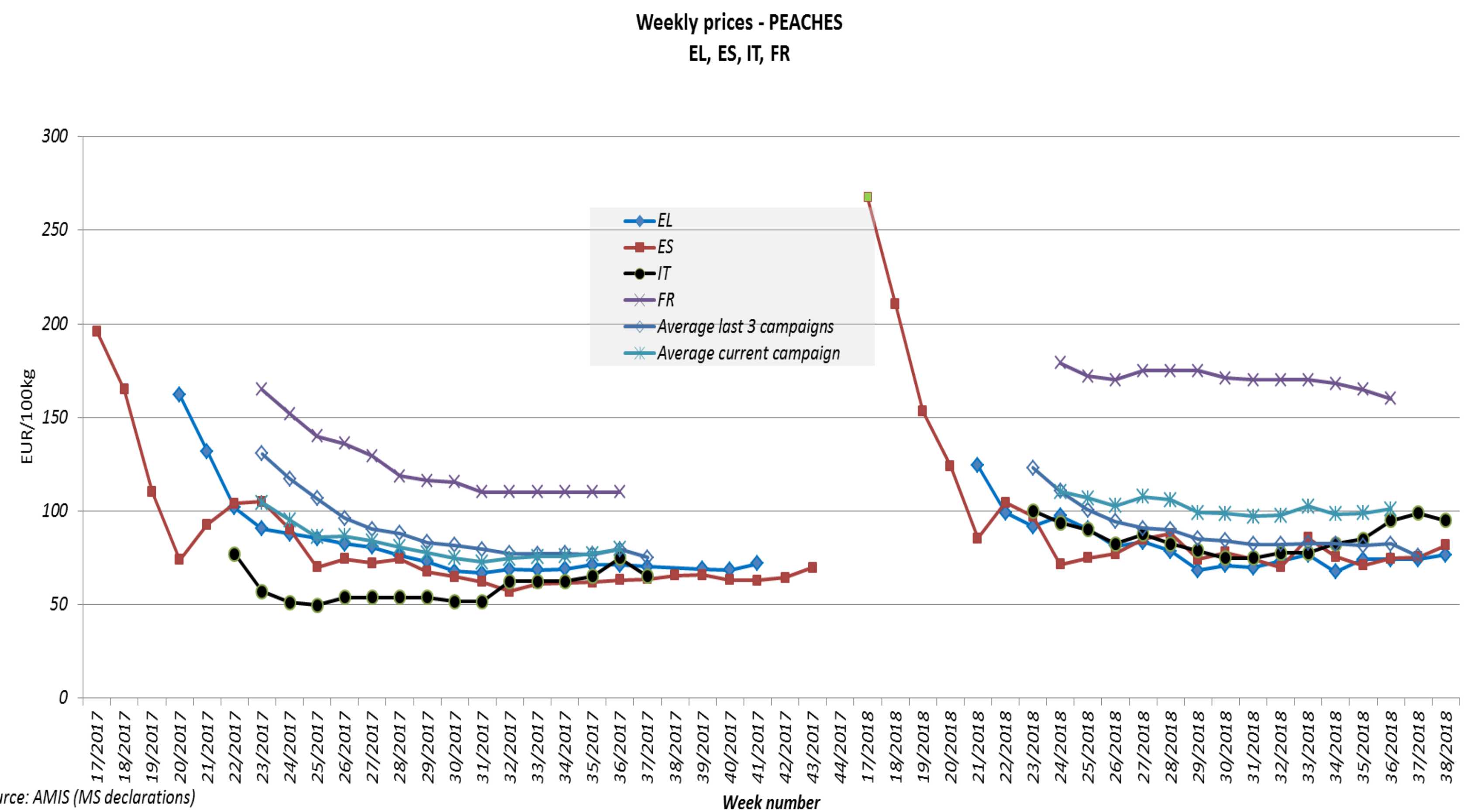
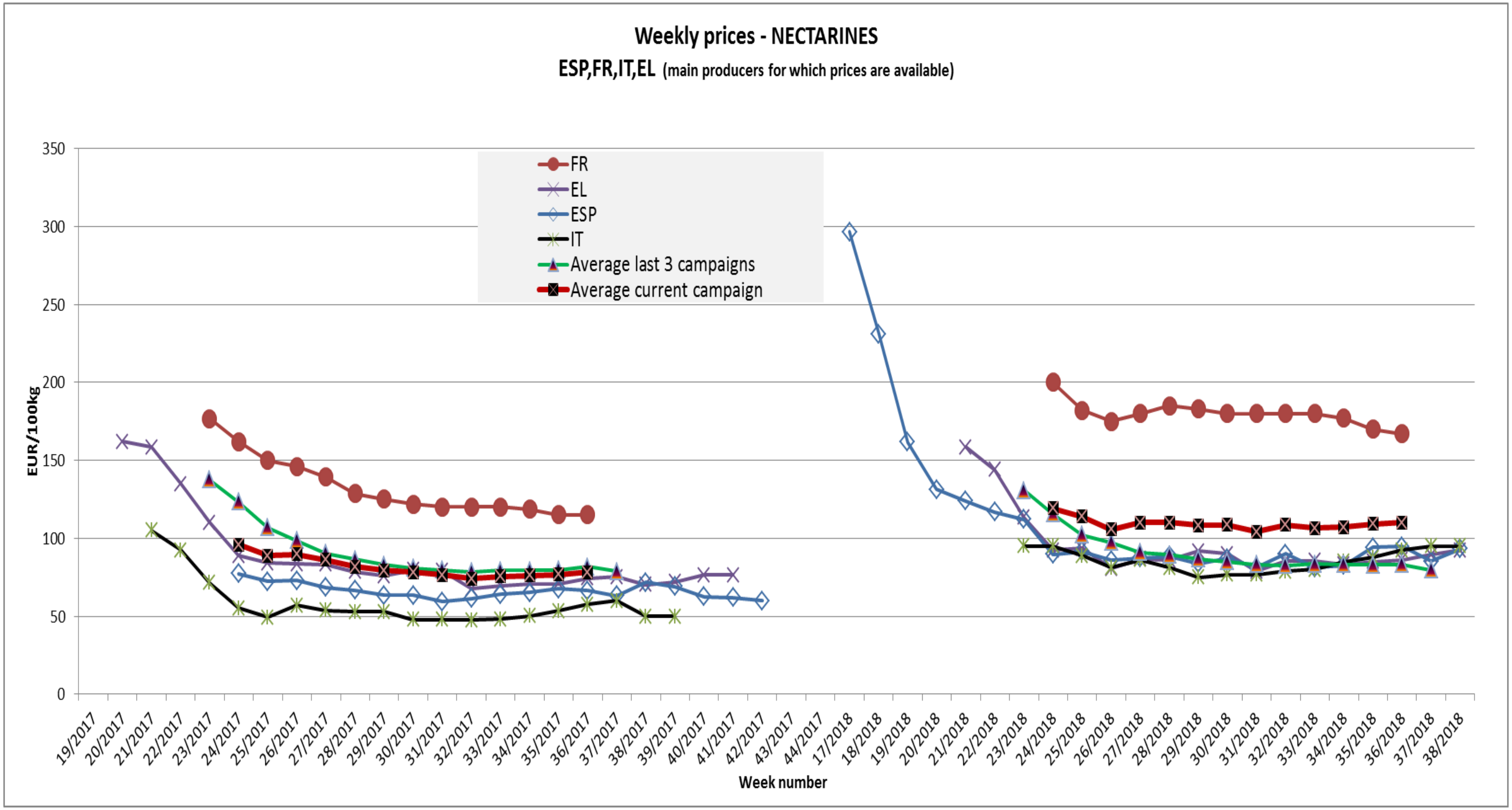


Source: AMIS (MS declarations)


Weekly prices - NECTARINES
ESP,FR,IT,EL (main producers for which prices are available)
FR
EL
ESP
IT
Average last 3 campaigns
Average current campaign
EUR/100kg
Week number
0
50
100
150
200
250
300
350
19/2017
20/2017
21/2017
22/2017
23/2017
24/2017
25/2017
26/2017
27/2017
28/2017
29/2017
30/2017
31/2017
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38/2018

Thank you for your attention!

Unit G.2. - Wine, spirits, and horticultural products

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Directorate G. Markets and Observatories