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## MINUTES

*Meeting of the Expert Group Fruit and Vegetables Market Observatory – Pip Fruit*

**06 November 2023**

Chair: DG AGRI, Unit E2

Delegations present: All organisations/experts were present, except WUWM.

### **1. Approval of the agenda and of the minutes of previous meeting**

The minutes of the previous meeting and the ongoing agenda were approved.

### **2. Nature of the meeting**

The meeting took place in hybrid format in Brussels, Rue de la Loi 130 (Meeting Room: 11A) and online and via the Interactio platform.

Language regime: Interpretation from FR–EN–IT–ES–PL to FR–EN–IT–ES–PL

### **3. List of points discussed**

#### 3.1. Update on supply

WAPA presented updated EU figures on the ongoing crop year for apple and pear production. Last August the EU apple crop was estimated at 11.4 Mio tonnes. However that first forecast was revised last October resulting on a reduction of the initial figure to just 10.9 tonnes of apples which represents a smaller than an average crop and about 8% smaller than the preceding marketing year; as harvesting operations are still going on during November in some Member States that is not a final estimate for the apple crop.

Poland remains the most important EU producer in terms of volume with about a third of the EU apple crop. There are frequently too many apples of low quality in Poland and the problem needs to be addressed with structural improvement measures. This marketing year however, as both the EU and Polish crops are relatively small and China, a major

worldwide player, has a small crop (which implies more export opportunities than usual) this problem is not present temporarily.

Regarding the EU pear crop, it was estimated initially during the 1<sup>st</sup> week of August at 1.74 Mio tonnes and revised last October at 1.72 Mio tonnes which represents a small crop with excellent expected developments on prices.

### 3.2. Market overview and prices

Regarding the main factors affecting the apple market situation the following are the main ones:

#### 1. Positive factors:

- much lower production this marketing year levels in Poland and Germany
- low apple stocks from the preceding season and lower season imports
- stocks of apple juice concentrate below normal levels;
- non-commercial backyard production in Germany is expected to be at a low level (300000 t), and thus should not put pressure on the market
- India with lower production could increase imports
- export opportunities in Asia and Central/South America
- apple juice: world supply at low levels and very high prices
- small crop in China, this country representing more than a half of world's supply and demand

#### 2. Negative factors:

- high costs of inputs, energy and logistics
- lower consumer purchasing power
- apple exports face an increasing number of competitor countries and products
- droughts and heatwaves may have reduced quality and storage options
- EU and world economic outlook facing challenges

As a result of these factors, prices of apples (for both fresh and processing purposes) are at excellent levels and above the price ranges observed in the preceding 5 year period. Prices for apple juice are at very high levels as well.

Regarding prices for pears, they are at very good levels as well.

### 3.3. Consumption trends

The conclusion of the report Freshfel Consumption Monitor 2023 and related data regarding apples were presented with more specific detail for pip fruit products. The average consumption of fruit and vegetables in kg/year/capita remains insufficient and

below the recommendations of the World Health Organization. As more imported products, especially from tropical countries, become available, there is a diversification trend on the types of products consumed which implies a reduction on consumption for the products that represent the highest volumes within fruit and vegetables. There is a significant proportion of EU citizens taking 0 fruit and vegetables portions a day.

#### 3.4. Export development

The COM continues to make efforts on opening new market opportunities for EU pip fruit producers. Asian countries represent a large part of the new opportunities and the COM has been active on improved access to India, Indonesia and Vietnam and other countries.

Important challenges however remain, such as the need to implement SPS matters following the agreement of improved access to US market for 10 Member States. Negotiations between the EU and India on a trade agreement are going on; an important EU mission will be done to this country next December. In India, as in South East Asia in general, the EU faces competition from Turkey, Iran and some countries of the Southern Hemisphere.

The access to some East European export destinations remains closed due to bans and war. This was compensated to some extent by the temporary opportunities derived from a big reduction in the Chinese apple crop (almost equal to the entire EU production, China represents more than a half of apple production and consumption in the World). Additional Extra-EU exports opportunities appeared in South East Asia and Central/South America. Egypt, an import destination, was at about a half closed due to internal financial restrictions. Some good opportunities of exports to Central and South America were also registered

#### **4. Conclusions/recommendations/opinions**

The key messages coming from this meeting could be summarized as follows:

1. The EU apple crop volume for the ongoing marketing year (about 10.9 Mio tonnes) most probably about 8% below the preceding crop;
2. Extreme weather events remain a major supply factor;
3. Very low backlog on apple stocks from the preceding crop.
4. International supply, most notably from China, at low volumes;
5. Prices significantly higher than the historical ranges and that for fresh, processing and for apples juice as well;
6. Purchasing power down in the EU and affecting demand levels; a consumption diversification trend observed;
7. Wars and export bans affecting trade and could be at the origin of route distortions and higher logistic costs;

8. Increasing competition from Turkey and Iran (in addition to China in case of normal crop), especially in the Asian markets.

9. Relatively small EU pear crop and very good prices.

## **5. Next steps**

Publication of the factual elements of the report on the F&V website <sup>(1)</sup>.

## **6. Next meeting**

The next meeting will take place on **13th March 2024**.

## **7. List of participants**

Annexed.

(e-signed)  
Pierre BASCOU

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<sup>(1)</sup> [https://agriculture.ec.europa.eu/data-and-analysis/markets/overviews/market-observatories/fruit-and-vegetables\\_en](https://agriculture.ec.europa.eu/data-and-analysis/markets/overviews/market-observatories/fruit-and-vegetables_en)

List of participants– Minutes  
**Meeting of the Expert Group Fruit and Vegetables Market Observatory – Pip Fruit**  
**06 November 2023**

ORGANISATION/EXPETS
A.R.E.F.L.H.
BOŽENA NOSECKA – AD-HOC EXPERT
EUCOFEL
EUROCOMMERCE
EUROPEAN AGRI-COOPERATIVES (COGECA)
EUROPEAN ASSOCIATION OF FRUIT AND VEGETABLE PROCESSORS (PROFEL)
EUROPEAN COORDINATION VIA CAMPESINA (ECVC)
EUROPEAN FARMERS (COPA)
FRESHFEL
HELWIG SCHWARTAU – AD-HOC EXPERT
KLAUS HEITLINGER – AD-HOC EXPERT
LUKASZ ZAREMBA – AD-HOC EXPERT
PHILIPPE BINARD - AD-HOC EXPERT
WALTER GUERRA – AD-HOC EXPERT
WORLD APPLE AND PEAR ASSOCIATION (WAPA)

EUROPEAN PARLIAMENT	0
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