



European Apples and Pears state of play  
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Pipfruit Market Observatory  
20 May 2021







# Pear Production EU

Source :WAPA - Prognosfruit

Country	x 1000 tons												
	2011	2012	2013	2014	2015	2016	2017	2018	2019	F2020	(1)	(2)	
Belgium	295	236	315	374	369	322	310	369	332	393	18	16	
Croatia	6	2	3	2	2	1	6	4	3	2	-40	-63	
Czech Rep	3	6	7	4	10	7	4	7	6	6	2	10	
Denmark	5	5	6	6	6	6	5	6	4	6	50	20	
France	176	124	154	131	155	138	133	134	121	133	10	3	
Germany	47	34	34	45	43	35	23	45	42	41	-2	12	
Greece	36	42	32	37	60	47	59	60	58	66	13	11	
Hungary	21	25	36	40	33	38	35	38	32	16	-50	-54	
Italy	934	650	726	736	764	681	738	730	363	611	68	0	
Latvia	0	0	0	1	0	0	0	0	1	1	7	45	
Netherlands	336	199	327	349	349	374	330	402	373	400	7	9	
Poland	55	45	65	50	80	55	40	70	70	65	-7	8	
Portugal	210	115	162	203	134	113	186	142	202	159	-22	-10	
Romania	28	19	24	17	13	16	12	21	16	13	-18	-21	
Slovakia	1	0	1	0	1	0	1	1	1	1	7	-15	
Slovenia	4	3	3	4	4	1	0	5	1	1	-11	-46	
Spain	461	355	403	400	344	311	331	298	313	307	-2	-2	
Sweden	2	1	1	1	1	1	1	2	1	2	100	58	
UK	32	28	26	25	25	24	23	23	20	17	-12	-21	
<b>Total:</b>	<b>2.652</b>	<b>1.888</b>	<b>2.327</b>	<b>2.425</b>	<b>2.394</b>	<b>2.171</b>	<b>2.237</b>	<b>2.358</b>	<b>1.959</b>	<b>2.238</b>	<b>14</b>	<b>2</b>	

- Final crop was set at 2,3 Mio T , +14% and full recovery after previous year low
- Italy not full recovery yet but Belgium and The Netherlands at 400.000 T
- Conference moving to 1Mio T while Abate is partially recovering at 245.000 T compared to peak low of 2019 at 140.000 T (Production potential at 320.000 T)



# Stock Apple EU by MS and varieties (May 2021)

Source :WAPA - Prognosfruit

Apple Stocks (Ton)	%2021/2020	Moved 2021	Moved 2020	5/1/2021	5/1/2020	5/1/2019	5/1/2018	5/1/2017
Austria (Steiermark)	58.9%	-11,318	-13,853	46,417	29,215	60,383	19,309	11,133
Belgium	-47.0%	-18,647	-14,748	32,594	61,460	55,531	5,106	32,190
Czech Republic	72.3%	-4,456	-4,903	13,620	7,904	17,678	7,477	6,992
Denmark		-1,077	-624	325	0	3,116	0	2,047
France	-31.2%	-81,090	-105,165	158,710	230,597	196,938	154,807	195,927
Germany	36.6%	-42,777	-50,507	96,853	70,907	133,973	45,265	126,892
Italy	17.9%	-191,569	-204,335	415,547	352,379	501,276	185,843	470,610
Poland	144.2%	-194,000	-166,000	398,000	163,000	405,000	177,000	300,000
Portugal		0	0	0	0			
Spain (Catalonia)	-36.9%	-22,595	-42,956	65,853	104,314	81,707	57,288	95,292
Switzerland	19.3%	-8,294	-9,156	23,175	19,424	27,954	7,472	22,706
The Netherlands	-35.9%	-16,881	-22,793	42,570	66,450	59,140	37,319	83,512
United Kingdom**	0.3%	-16,808	-17,845	19,641	19,589	21,353	13,773	0
<b>TOTAL</b>	<b>16.7%</b>	<b>-609,512</b>	<b>-652,885</b>	<b>1,313,305</b>	<b>1,125,239</b>	<b>1,564,048</b>	<b>710,659</b>	<b>1,347,302</b>

Variety (Ton)	%2021/2020	Moved 2021	Moved 2020	5/1/2021	5/1/2020	5/1/2019	5/1/2018	5/1/2017
Annurca		0	0	0	0	0	0	0
Boskoop	3072.1%	-177	-1,660	1,301	41	3,098	132	1,622
Braeburn	-6.2%	-19,216	-28,293	32,768	34,948	53,374	10,438	31,678
Bramley	27.7%	-5,132	-4,593	9,051	7,087	12,250	11,000	0
Cameo	592.2%	-1,306	-531	803	116	271	0	0
Cortland		0	0	0	0	0	0	0
Cox Orange		-92	-142	0	0	15	0	1
Cripps Pink	34.8%	-35,888	-34,345	33,417	24,787	28,629	18,453	33,573
Elstar	-50.7%	-16,226	-21,570	15,840	32,141	19,720	8,349	26,724
Fuji	-0.7%	-29,455	-33,691	37,502	37,771	59,136	26,161	38,219
Gala	21.8%	-62,955	-54,779	57,551	47,264	50,570	20,546	24,216
Gloster	59.3%	-10,049	-18,106	35,046	22,000	25,584	25,218	25,217
Golden Delicious	-15.8%	-115,165	-173,546	397,909	472,828	525,959	298,748	573,676
Granny Smith	34.6%	-27,379	-21,654	66,253	49,232	58,553	55,263	43,548
Holsteiner Cox		0	0	0	0	0	0	0
Idared	115.2%	-31,860	-32,987	121,340	56,391	129,846	68,377	114,048
Jonagold	5.3%	-24,557	-23,998	85,786	81,430	109,797	41,982	110,138
Jonagored	-36.8%	-8,356	-6,601	22,712	35,950	49,058	8,279	42,652
Jonathan		0	0	0	0	0	0	0
Lobo		0	0	0	0	0	0	0
Morgendurff/imperat	83.6%	-2,065	-1,946	5,959	3,247	6,402	928	5,638
Pinova	64.2%	-15,700	-12,275	25,090	15,281	21,176	1,611	5,184
Red Delicious	28.1%	-31,322	-29,495	55,127	43,044	51,418	27,356	51,817
Red Jonaprince	49.8%	-31,429	-28,785	70,205	46,861	58,779	20,649	37,015
Reinette	159.9%	-5,047	-7,518	9,229	3,550	10,917	785	7,341
Shampion	137.9%	-15,056	-25,181	35,702	15,004	70,377	15,048	25,100
Stayman		0	0	0	0	400	246	2,989
Spartan		71	-60	102	0	0	0	0
Other new varieties*	14.2%	-21,770	-28,671	39,598	34,671	49,962	12,995	37,788
Other	151.7%	-99,381	-62,456	155,016	61,596	168,757	38,095	109,117
<b>Total</b>	<b>16.7%</b>	<b>-609,512</b>	<b>-652,885</b>	<b>1,313,305</b>	<b>1,125,239</b>	<b>1,564,048</b>	<b>710,659</b>	<b>1,347,302</b>

- **Stock on 1<sup>st</sup> May**
  - **high** in Poland and Italy
  - **lower** in FR, BE, NL and Spain
- Sales are slightly lower than last year at same time in **April 2021** sales were **610.000 T** compared to **652.000 T in April 2020** => nothing alarming as volume handled last year were high.
- **Stocks** in main producing countries (IT, FR,..) **expected to be cleared by June/early July, PL to be cleared by August**
- **Lower summer fruit** to play a role in clearing apples market
- **Limited export** to third countries
- **No expected high SH volume**
- **Prices for processing lower**
- **USA stocks low** at 723.000 T, **19% lower than last year**



# Stock Pear EU (May 2021)

- **Some fierce competition took place** , situation is moving back to balanced situation.
- **Feeling of optimist** for the rest of the season. Good sales in April 2021 compared to 2020 ( 126.000 T v. 78.000 T ) => Market trends: strong efforts of identification of **local origin to boost sales on domestic market** but also **good intra EU market**.
- **Less attractiveness for export**
- **Lower volumes of other fruit categories (citrus)** are **sustaining sales for apples and pears**.
- **USA stocks at 34.000 T, 16% lower than last year**

Source :WAPA - Prognosfruit

Pear Stocks (Ton)	%2021/2020	Moved 2021	Moved 2020	5/1/2021	5/1/2020	5/1/2019	5/10/2018	5/1/2017
Belgium	177.0%	-51,845	-43,908	39,583	14,292	39,132	12,520	24,929
Czech Republic	-20.0%	-751	-522	160	200	756	600	370
Denmark		0	-19	0	0	0	0	0
France	30.6%	-587	-423	712	545	749	775	464
Germany	124.4%	-107	-169	505	225	404	0	25
Italy		-24,975	0	18,052	0	15,977	26,736	6,879
Poland		-1,000	0	0	0	0	0	0
Portugal*	-100.0%	0	12,058	0	12,058	12,737	5,745	4,397
Spain (Catalonia)	4.0%	-8,738	-12,443	16,667	16,023	17,223	19,559	11,861
Switzerland	-2.1%	-797	-1,603	838	856	676	0	3
The Netherlands	18.3%	-35,804	-31,665	70,529	59,636	69,315	61,291	69,781
United Kingdom**		-1,290	-143	533	0	46	0	0
<b>TOTAL</b>	<b>42.1%</b>	<b>-125,894</b>	<b>-78,837</b>	<b>147,579</b>	<b>103,835</b>	<b>157,015</b>	<b>127,226</b>	<b>118,709</b>
Variety (Ton)	%2021/2020	Moved 2021	Moved 2020	5/1/2021	5/1/2020	5/1/2019	5/1/2018	5/1/2017
Abate Fetel		-15,023	0	7,298	0	5,607	14,445	3,806
Alexandrina	49.2%	-270	-483	569	382	288	440	424
Blanquilla	916.2%	-926	-423	1,378	136	359	1,580	163
Conference	47.9%	-99,261	-86,442	130,663	88,357	133,534	101,914	108,704
Doyenne du comice	518.2%	-124	-16	136	22	304	111	47
Kaiser		-5,987	0	3,370	0	810	2,259	531
Rocha	-100.0%	0	12,058	0	12,058	12,737	5,745	4,397
Other	44.6%	-4,302	-3,531	4,164	2,881	3,376	732	637
<b>Total</b>	<b>42.1%</b>	<b>-125,894</b>	<b>-78,837</b>	<b>147,579</b>	<b>103,835</b>	<b>157,015</b>	<b>127,226</b>	<b>118,709</b>



# COVID impact apples Intra EU trade

Source :Eurostat & WAPA - Prognosfruit

EU	2020	2019	2018
March	210,500	204,565	210,099
April	196,546	177,593	185,355
May	168,383	161,851	168,130
<b>Production</b>	<b>10,783,000</b>	<b>13,275,000</b>	<b>9,251,000</b>

Crop 2019
Crop 2018
Crop 2017

Medium crop in 2020 but highest volume shipped intra EU in 2020 COVID months => strong intra trade

Poland	2020	2019	2018
March	46,313	52,823	46,480
April	39,927	43,910	40,680
May	28,442	38,036	43,882
<b>Production</b>	<b>2,910,000</b>	<b>4,810,000</b>	<b>2,870,000</b>

Crop 2019
Crop 2018
Crop 2017

Medium crop in 2020 but lowest volume shipped intra EU in 2020 COVID months => more local market

Italy	2020	2019	2018
March	66,316	62,968	64,935
April	62,064	48,492	49,559
May	48,492	50,336	32,722
<b>Production</b>	<b>2,096,000</b>	<b>2,264,000</b>	<b>1,704,000</b>

Crop 2019
Crop 2018
Crop 2017

Medium crop in 2020 but highest volume shipped intra EU in March and April 2020 COVID months => strong intra trade



# COVID impact apples Intra EU trade

France	2020	2019	2018
March	40,838	31,870	46,737
April	35,242	25,641	36,300
May	19,506	16,089	23,921
<b>Production</b>	<b>1,615,000</b>	<b>1,477,000</b>	<b>1,424,000</b>

Crop 2019

Crop 2018

Crop 2017

Netherlands	2020	2019	2018
March	12,188	9,929	13,566
April	15,296	9,980	22,401
May	28,442	16,414	31,290
<b>Production</b>	<b>272,000</b>	<b>267,000</b>	<b>228,000</b>

Crop 2019

Crop 2018

Crop 2017

Belgium	2020	2019	2018
March	10,562	12,128	5,685
April	12,112	12,051	5,648
May	13,745	11,390	9,741
<b>Production</b>	<b>242,000</b>	<b>231,000</b>	<b>188,000</b>

Crop 2019

Crop 2018

Crop 2017

High crop in 2020 but average volume shipped intra EU 2020 COVID months => mixed local and intra trade interest

High crop in 2020 but average volume shipped intra EU 2020 COVID months => mixed local and intra trade interest

High crop in 2020 but HIGH volume shipped intra EU IN April and May 2020 COVID months => high | intra trade interest



# Export: impact of COVID

Source :Eurostat

Export TC Sept to Dec	2020	2019	2018	2017	2016	2015
Apples	264,200	445,733	403,135	290,433	469,812	486,688
Pears	90,194	149,423	135,450	157,251	135,556	142,513

- The lowest exported volume for apples and for pears the start of this season (**covering September to December**) compared to the previous 5 years.
- All destinations but one in the TOP 10 are down significantly.

Apples	2020	2019	var
<b>Total</b>	<b>264,200</b>	<b>446,225</b>	<b>-41%</b>
Egypt	93,949	130,362	-28%
Saudi Arabia	24,163	48,563	-50%
Brazil	17,438	20,413	-15%
Belarus	17,146	41,719	-59%
Jordan	11,618	16,545	-30%
UAE	10,239	21,469	-52%
Norway	9,292	10,601	-12%
Colombia	8,866	14,330	-38%
Switzerland	7,871	10,207	-23%
India	6,641	17,019	-61%

Pears	2020	2019	Var
<b>Total</b>	<b>90,194</b>	<b>149,428</b>	<b>-40%</b>
Belarus	32,855	57,893	-43%
Brazil	14,008	25,093	-44%
Morocco	8,087	16,687	-52%
Norway	3,979	5,152	-23%
Kazakhstan	3,878	6,793	-43%
Bosnia Herz	3,846	5,024	-23%
China	3,349	4,209	-20%
Saudi Arabia	2,974	3,257	-9%
United Arab Emirate	1,901	1,980	-4%
Jordan	1,732	1,620	7%



Source VBT



**Too early and risky for realistic impact on “winners or losers” for next season. Nature and market to judge.....!!**

## Next season



**Release of crop forecast:** first data gathering towards starting end of June and consolidation of forecast data end of July for presentation at **Prognosfruit on 5<sup>th</sup> August** (online )



**Evaluation of the various cold spell of April and May –going on,** no easy final estimation and risky to assess impact crops even if fruit damages are significant in Southern and Central Europe and more on other fruit



**Damages are more important for summer fruit (apricots, peaches and nectarines) than for apples and pears.** Summer pears probably most affected and all early varieties to be the most affected



**Not look only at volume but also quality:** Quantitative estimates still uncertain while qualitative impact could affect ratio fresh market/processing



# Next season

## Frost impact: multiple factors to balance up to harvest

Source:D.Wozniak (Rajpol)



**by countries/regions:** South and Central more affected than North)



**by orchards type:** depending of level of protection against frost: water, wind and fire, orchard exposition



**by level of the vegetation development:** some regions under flowering, other still no green buds



**by level of flowering :** abundant in some countries e.g. France, which could limit significantly the damages



**by weather conditions** after the cold and up to harvest (rainy, hail,..) impacting on size, color, texture...



**Conclusions: difficult and still too early or imprudent to measure and communicate realistically on damage of the frost impact on the next crop. Prognosfruit to analyse trend !**



# Next season

## Poland

### Winter

- Was strong , couple of nights with frost up to -28C with some damages to trees.
- Some growers reported damage for buds after winter mainly on pears but without real influence oncoming crop.

### Spring

- Very early stage of vegetation during the mid april frost
- Frost was between -2C and -6C without any damages for apples and pears
- Some cold nights as well in May but expected with limited impact

### Timing

- So far the season is delayed
- compared to last year by about 10 days



# Next season

## Italy

### Apples

- All production regions affected but impact is clearly less in main regions ( Trento and Alto Adige) than in other regions
- Quantitative assessment still difficult and impact most likely limited, more concerns on quality
- Concerns on quality could ultimately influence the fresh/process ratio

### Pears

- Repeated freezing night from mid March to Mid April , no homogenous intensity
- Pears flowering hardly started in time of cold spell
- Deeper damages in Emilia Romagna and Veneto for summer fruit



# Next season

## France

### First assessment

- The apples and pears orchards were severely affected by the repeated frost night.
- Most of the early varieties were experiencing already blossoming leading to significant damages, e.g for apples in South East and for summer pears
- Flowering was quite abundant, giving reasons to mitigate the damages.

### Scope

- Temperatures went down to -6C or -7C in some area and might have lasted up to 10 consecutive days.
- Most of the producing regions were affected, as the cold covered all the territory.
- Damages depend of the regions, varieties and type of protection of the orchards: complexity of evaluation of damages
- Can only work today on basis of hypothesis



# Next season

## Belgium

- Until now **no serious message about real damage in the pears**. Snow was a good cover for the frost. Perhaps there will be a problem with pollination because of the bad weather that was forecasted.
- **Apple blossoms** are not open yet so there will be **no damage in the plantations**.

## The Netherlands

- Considerably **colder than normal** in the Netherlands, **but** it is **not extremely cold** for April. Snow is also not exceptional in April.
- The **snow and light frost has not caused damage** to apple and pear.
- **Flowering just started**. Cherry is a bit further in development. For cherries and plums it is still too early to say anything about possible damage.
- **Too early to draw any conclusions but very limited concerns for apples and pears**.



# Next season

## Hungary

- After Easter, **serious frosts took place all around the country**: in some regions temperatures went down to -8C and even lower.
- **Apricot, peach and cherry orchards**, which were in bloom were **most affected**,
- **Limited information about damages in pear or apple orchards.**
- In some cases, the buds got some cold, but given that **blooming of these species will start later**, right now we think that these **coldspells let them untouched**

## Germany

- **Nights of frost could limit the harvest 2021 to a small extent.**
- **Too early to make quantitative statements.** In the South (Lake Constance) there were temperatures of -5/-6C in some locations.
- **The apple varieties are affected differently.** Gala and Elstar are okay, while Boskoop is more damaged.
- **In the North (Niederelbe) we have no damage.** The temperatures were "only" -2/-3C. **The vegetation in the North is 10-14 days delay than last year.**

## Spain

- Catalonia experienced **cold nights as well**, affecting primarily the production of peaches and nectarines
- **Apples and pears some damages** registered not estimated yet. **Pears, more significant damages (limonera and ercolina).** For conference, **consequences on size**
- **Early varieties** damages were registered but the **number of flowers will probably limit volume damage.**
- **Later varieties, damages will not be that much** on volume but rather on quality and possibly size.



# Forecast 2021

- Avoid speculation on crop forecast as long as assessment is not completed for apples and pears and consolidated details are provided by Prognosfruit “experts”
- Forecast of production for apples and pears for the EU and beyond to be prepared by WAPA with the Prognosfruit technical experts network
- Data to be released during Prognosfruit 2021 on 5<sup>th</sup> August 2021 in Online event
- Registration to open mid June 2021 on

**[www.prognosfruit.eu](http://www.prognosfruit.eu)**



Prognosfruit

The Annual Apple & Pear Event



Many thanks

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