



European Apples and Pears state of play

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Pipfruit Market Observatory
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Apple Production EU 2020 final

Source :WAPA - Prognosfruit

Country											x 1000 tons	
	2011	2012	2013	2014	2015	2016	2017	2018	2019	F2020	(1)	(2)
Austria	199	157	155	188	177	40	67	184	146	126	-14	-5
Belgium	305	220	220	318	285	234	88	231	242	168	-31	-10
Croatia	83	59	96	62	101	35	66	86	60	55	-8	-22
Czech Rep	79	118	121	131	156	139	102	145	103	111	8	-5
Denmark	20	18	23	26	24	24	19	24	15	24	60	24
France	1.701	1.169	1.576	1.444	1.674	1.515	1.424	1.477	1.651	1.337	-19	-12
Germany	953	972	804	1.116	973	1.033	597	1.093	991	973	-2	9
Greece	305	242	236	245	242	259	231	301	276	289	5	7
Hungary	301	750	585	920	522	498	530	782	452	370	-18	-37
Italy	2.293	1.939	2.122	2.456	2.280	2.272	1.704	2.264	2.096	2.114	1	5
Latvia	8	9	15	10	8	10	8	14	10	14	40	31
Lithuania	49	39	40	27	46	50	48	62	26	58	123	28
Netherlands	418	281	314	353	336	317	228	267	272	220	-19	-14
Poland	2.500	2.900	3.170	3.750	3.979	4.035	2.870	4.810	2.910	3.410	17	-3
Portugal	265	221	284	272	329	263	314	267	354	301	-15	-3
Romania	412	351	387	382	336	327	230	425	327	343	5	5
Slovakia	33	36	42	46	40	17	15	44	35	30	-14	-4
Slovenia	73	45	56	68	71	12	6	72	36	46	28	21
Spain	507	391	464	505	482	495	480	476	555	437	-21	-13
Sweden	17	14	17	16	21	20	18	32	20	32	60	37
UK	226	162	204	206	243	239	207	219	205	198	-3	-6
Total:	10.746	10.095	10.929	12.541	12.326	11.834	9.251	13.275	10.783	10.656	X? -1	-4

- Final crop was set at **10.6 Mio T** , 1% lower than last year, 4% down lower 3 year average
- Spain, Portugal, France, Benelux, Austria, Hungary with **low crop**
- **Golden** below 2 Mio T, **Gala** moving towards 1,5 Mio T, **Idared** and **Red Del** low crop each at 600.000T, **Jonagold group** also lower this year

Also in 2021 ???

In Mio T 10 12 9 13 10

Moving towards new production cycle influenced by climatic conditions????



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
Total:	2.652	1.888	2.327	2.425	2.394	2.171	2.237	2.358	1.959	2.238	14	2

- **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
TOTAL	16.7%	-609,512	-652,885	1,313,305	1,125,239	1,564,048	710,659	1,347,302

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
Morgendur/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
Total	16.7%	-609,512	-652,885	1,313,305	1,125,239	1,564,048	710,659	1,347,302

- **Stock on 1st 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
TOTAL	42.1%	-125,894	-78,837	147,579	103,835	157,015	127,226	118,709
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
Total	42.1%	-125,894	-78,837	147,579	103,835	157,015	127,226	118,709



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
Production	10,783,000	13,275,000	9,251,000

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
Production	2,910,000	4,810,000	2,870,000

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
Production	2,096,000	2,264,000	1,704,000

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
Production	1,615,000	1,477,000	1,424,000

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
Production	272,000	267,000	228,000

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
Production	242,000	231,000	188,000

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 I 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
Total	264,200	446,225	-41%
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
Total	90,194	149,428	-40%
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 5th 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 5th August 2021 in Online event
- Registration to open mid June 2021 on

www.prognosfruit.eu



Prognosfruit
The Annual Apple & Pear Event



Many thanks

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(Contact at WAPA and Prognosfruit Secretariat Philippe Binard)