

# Outlook 2018/2019 apples & pears season

Philippe Binard



# NH Apple 2018-2019



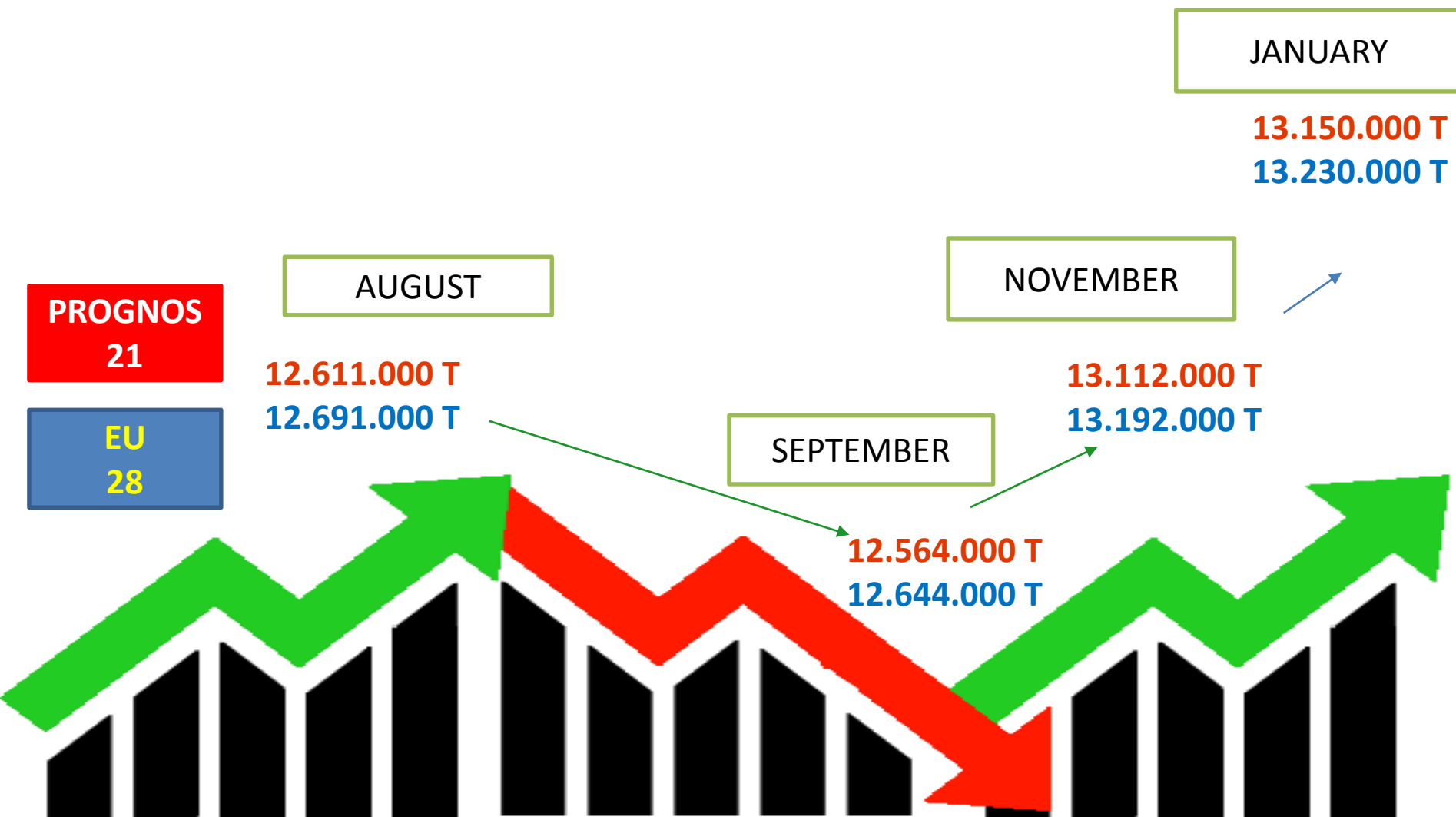
# Apple Production EU



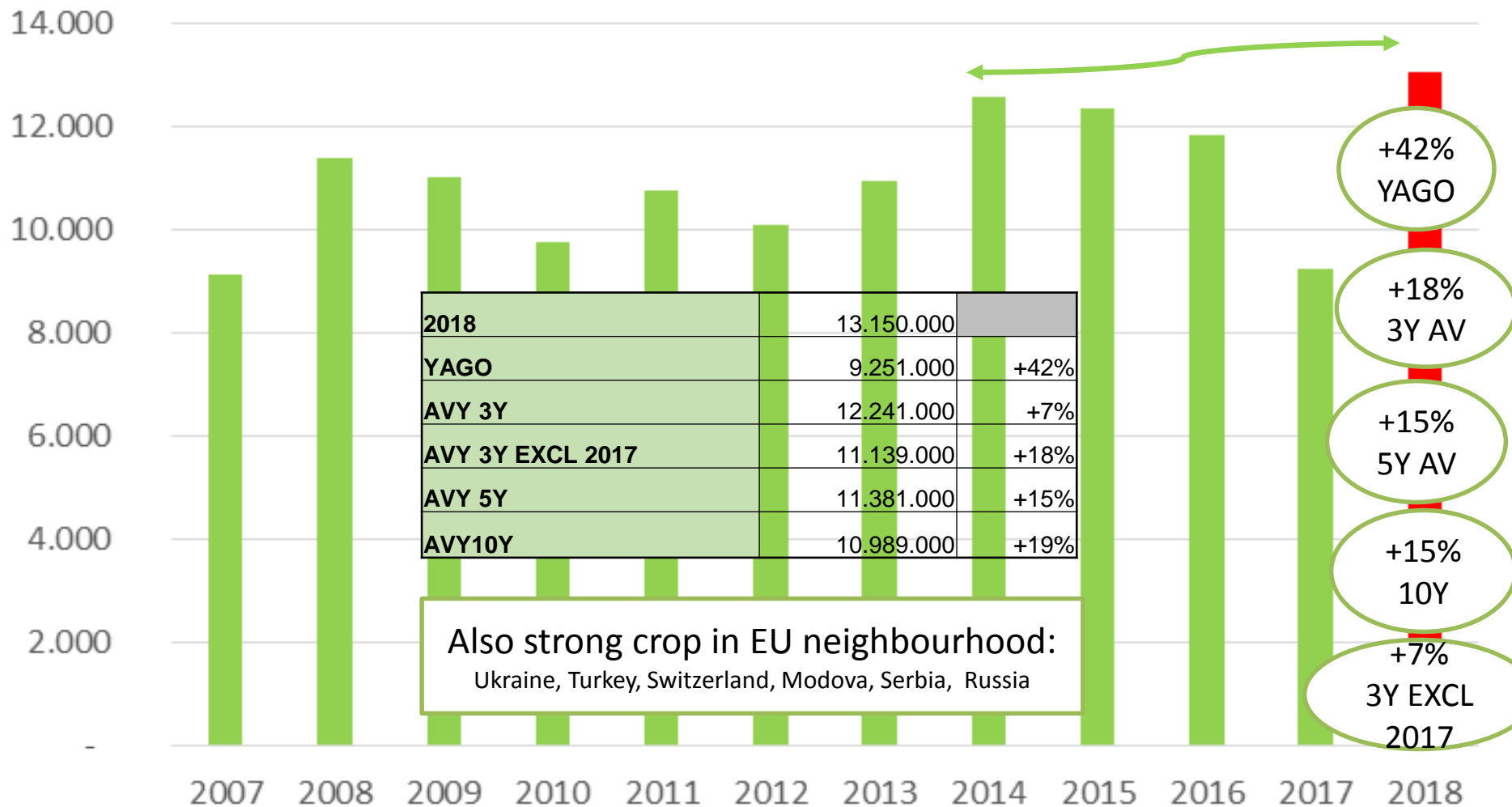
x 1000 tons

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	F2018	(1)	(2)
Austria	185	169	199	157	155	188	177	40	67	184	175	94
Belgium	344	288	305	220	220	318	285	234	88	274	211	35
Croatia	60	89	83	59	96	62	101	35	66	108	64	60
Czech Rep	145	103	79	118	121	131	156	139	102	128	25	-3
Denmark	24	21	20	18	23	26	24	24	19	24	26	7
France	1.651	1.579	1.701	1.169	1.576	1.444	1.674	1.515	1.424	1.477	4	-4
Germany	1.071	835	953	972	804	1.116	973	1.033	597	934	56	8
Greece	224	254	305	242	236	245	242	259	231	286	24	17
Hungary	514	488	301	750	585	920	522	498	530	782	48	51
Italy	2.237	2.179	2.293	1.939	2.122	2.456	2.280	2.272	1.704	2.264	33	9
Latvia	13	12	8	9	15	10	8	10	8	6	-25	-31
Lithuania	74	46	49	39	40	27	46	50	48	54	13	13
Netherlands	402	334	418	281	314	353	336	317	228	268	18	-9
Poland	2.600	1.850	2.500	2.900	3.170	3.750	3.979	4.035	2.870	4.810	68	33
Portugal	274	251	265	221	284	272	329	263	314	278	-11	-8
Romania	379	423	412	351	387	382	336	327	230	424	84	42
Slovakia	48	32	33	36	42	46	40	17	15	47	213	96
Slovenia	64	66	73	45	56	68	71	12	6	71	1.083	139
Spain	470	486	507	391	464	505	482	495	480	473	-1	-3
Sweden	18	20	17	14	17	16	21	20	18	32	78	63
UK	212	214	226	162	204	206	230	239	207	225	9	0
<b>Total:</b>	<b>11.008</b>	<b>9.740</b>	<b>10.746</b>	<b>10.095</b>	<b>10.929</b>	<b>12.541</b>	<b>12.313</b>	<b>11.834</b>	<b>9.251</b>	<b>13.150</b>	<b>42</b>	<b>18</b>

# Prognosfruit updated forecast



# EU orchard potential is today well above at 13,5 Mio T



x 1000 tons

Variety	2009	2010	2011	2012	2013	2014	2015	2016	2017	F2018	(1)	(2)
Annurca	35	34	35	35	35	40	35	35	35	46	32	32
Boskoop	82	60	73	58	58	85	77	71	34	62	83	2
Braeburn	338	289	324	264	302	323	330	318	220	293	33	1
Bramley	95	95	91	59	70	83	84	85	75	78	4	-4
Cortland	80	50	70	40	25	25	26					
Cox Orange	65	89	89	38	42	26	31	29	20	21	3	-21
Cripps Pink	162	160	184	144	187	249	244	261	260	273	5	7
Elstar	488	362	453	353	346	431	399	387	265	327	23	-7
Fuji	245	251	261	212	311	321	338	288	290	323	12	6
Gala	1.077	989	1.137	1.111	1.204	1.318	1.375	1.312	1.271	1.463	15	11
Gloster	114	112	148	187	196	201	183	197	166	187	13	3
Golden Delicious	2.636	2.413	2.628	2.286	2.535	2.677	2.534	2.406	1.911	2.438	28	7
Granny Smith	343	342	413	302	361	383	405	384	363	386	6	0
Idared	828	619	692	986	1.069	1.192	1.129	965	629	1.164	85	28
Jonagold	742	544	652	475	500	644	633	567	298	582	95	16
Jonagored	204	180	194	367	341	491	519	539	335	557	66	20
Jonathan	305	282	242	201	178	193	143	123	108	164	52	31
Lobo	100	60	100	50	30	30	31					
Morgendurf/impera	67	81	61	53	57	74	46	49	54	39	-27	-21
Pinova	35	27	37	43	62	79	119	104	85	150	76	46
Red Delicious	724	663	680	541	597	675	643	632	558	731	31	20
Red Jonaprince	38	29	33	48	53	98	104	156	114	366	221	193
Reinette Grise du	99	101	108	73	121	126	134	108	83	140	68	29
Shampion	323	257	327	423	457	494	513	522	416	568	37	17
Spartan	8	6	6	6	6	6	5	4	3	4	30	6
Stayman	16	18	17	12	18	14	14	14	8	7	-9	-41
Other new varieties	108	134	152	100	152	165	204	213	209	306	46	47
Other	1.652	1.495	1.541	1.377	1.358	1.808	1.713	1.735	1.192	2.126	78	37
Ligol				250	260	290	303	330	250	350	40	19



Larger crop ever on:

- Gala
- Cripps Pink
- Jonagored
- Pinova
- Red Delicious
- Red Jonaprince
- Shampion
- Ligo
- Reinette

+ on-going growth other new varieties

# Apple Production US

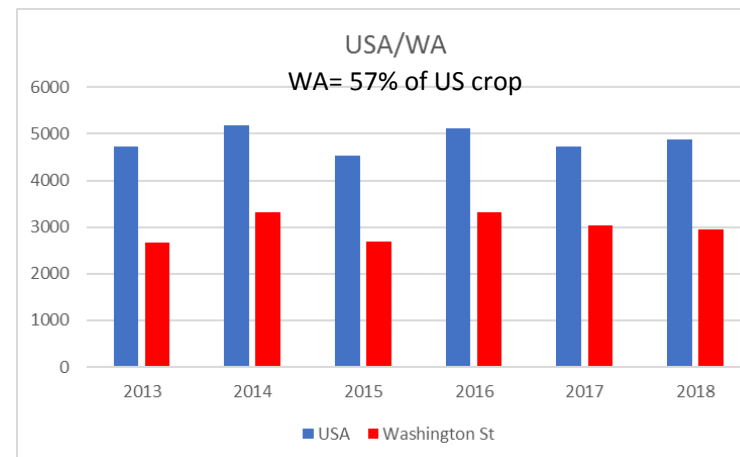


*x 1000 tons*

State	2013	2014	2015	2016	2017	F2018	(1)	(2)
New York	640	587	617	535	544	591	9	4
Pennsylvania	213	224	235	200	222	229	3	4
Virginia	88	88	89	82	100	98	-2	9
North Carolina	61	57	48	47	48	44	-8	-8
West Virginia	43	37	41	36	43	48	12	19
New Jersey	13	17	17	16	20	22	12	28
Maryland	15	19	19	17	21	19	-9	-1
Vermont	15	13	16	12	13	9	-33	-35
Maine	12	17	16	17	20	22	11	25
Massachusetts	20	20	20	13	21	19	-7	9
Connecticut	12	9	11	6	11	12	6	26
Michigan	572	465	451	533	363	533	47	19
Ohio	24	20	23	15	21	23	10	18
Wisconsin	19	24	23	19	23	23	3	9
Illinois	7	10	9	8	10	11	7	16
Minnesota	9	11	12	9	12	11	-6	2
Washington	2.676	3.311	2.698	3.320	3.039	2.952	-3	-2
California	122	109	66	114	104	118	13	24
Oregon	64	70	57	89	79	70	-11	-6
Idaho	33	29	21	25	23	24	6	6
<b>Total*</b>	<b>4.723</b>	<b>5.185</b>	<b>4.538</b>	<b>5.114</b>	<b>4.737</b>	<b>4.880</b>	<b>3</b>	<b>2</b>

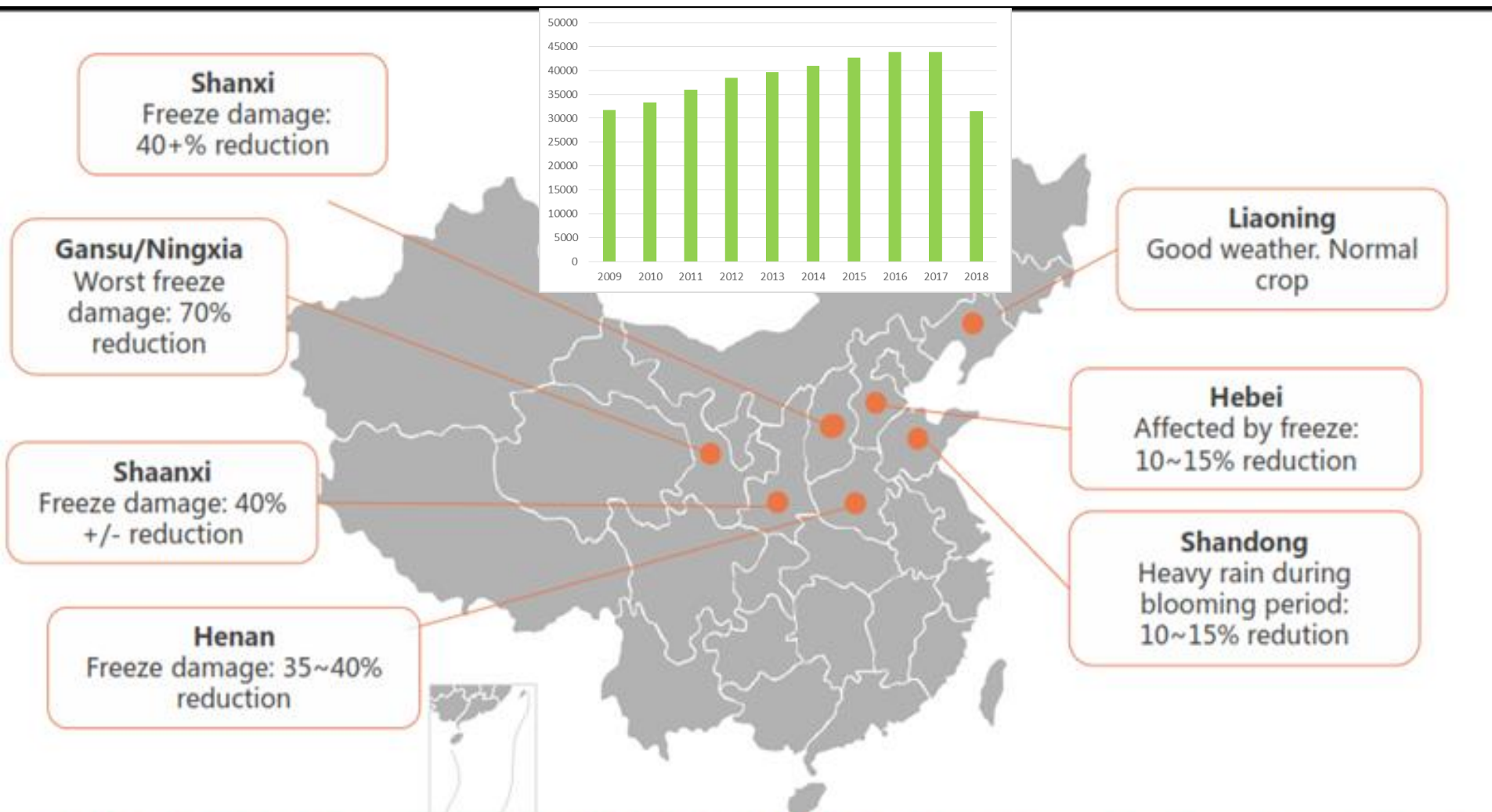
Slight decrease from initial forecast in summer 2018 at 4,914,000 T

Push for new varieties like Honey Cripps, Cosmic Cripps, Gala ...





# Apple Production China



**2018 Crop Forecast: 32,060,000 MT: -28% reduction from 2017**



## NH stocks apples 2018/2019



# Stock Apple USA ( March 2019)



Apple Stocks (Ton)	%2019/2018	Moved 2019	Moved 2018	01-03-19	01-03-18	01-03-17	01-03-16	01-03-15
Braeburn	12,5%	-1.525	-3.773	7.203	6.403	10.500	6.289	22.220
Cortland	43,8%	-743	-1.410	3.316	2.306	1.429	4.211	2.630
Empire	8,2%	-4.974	-3.678	15.645	14.464	9.890	14.502	14.730
Fuji	-8,9%	-39.866	-32.548	153.536	168.572	140.025	124.571	151.040
Gala	-7,8%	-50.461	-71.976	244.606	265.263	246.016	181.701	245.959
Golden Delicious	-38,5%	-12.730	-20.504	56.025	91.032	82.819	96.558	153.498
Granny Smith	-38,1%	-20.866	-30.204	141.474	228.389	125.409	178.900	169.525
Honeycrisp	17,0%	-28.051	-27.003	96.615	82.609	43.582	42.610	22.410
Idared	-39,3%	-629	-419	1.029	1.696	3.564	2.744	3.907
Jonagold	23,0%	-1.372	-1.753	7.451	6.060	8.347	5.946	14.788
Jonathan		-133	-305	2.039	0	2.153	4.002	2.687
McIntosh	4,7%	-6.880	-6.917	18.713	17.875	12.177	28.661	22.334
Mutsu/Crispin	-23,0%	-305	-95	1.277	1.658	1.162	838	877
Newtown Pippin		-134	0	438	0	0	0	0
Northern Spy		0	0		0	0	0	0
Pink Lady	9,1%	-9.718	-15.778	68.603	62.867	69.822	57.740	45.678
Red Delicious	-4,9%	-57.436	-87.640	355.132	373.255	465.602	351.226	552.403
Rome	13,9%	-210	-1.048	4.211	3.697	6.689	3.983	4.955
Rome Sport	-46,2%	19	-381	400	743	2.401	2.477	2.230
Spartan	-4,3%	-38	-190	2.134	2.230	896	2.725	2.687
Stayman	-26,2%	-133	-95	267	362	267	400	591
Winesap		0	0		0	0	0	0
York	2405,3%	-153	-19	476	19	76	152	95
Others	-52,7%	-17.665	62.581	68.069	143.856	95.053	74.986	72.547
<b>TOTAL</b>	<b>-15,3%</b>	<b>-254.003</b>	<b>-242.278</b>	<b>1.248.659</b>	<b>1.473.356</b>	<b>1.327.879</b>	<b>1.185.222</b>	<b>1.507.791</b>

Stocks are 15% down to last year while production was 3% up

# Stock Apple EU ( March 2019)

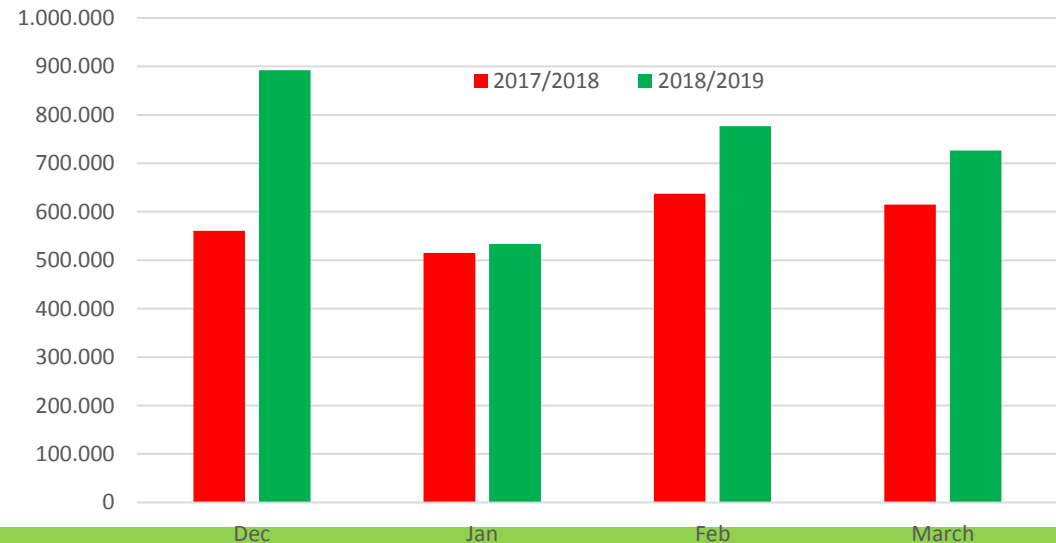


Apple Stocks (Ton)	%2019/2018	Moved 2019	Moved 2018	01-03-19	01-03-18	01-03-17	01-03-16	01-03-15
Austria (Steiermark)	131,4%	-10.011	-9.547	86.742	37.479	19.429	93.192	98.190
Belgium	686,0%	-16.530	-3.334	99.388	12.645	59.809	113.365	129.231
Czech Republic	77,9%	-9.878	-6.167	35.399	19.897	18.961	27.711	19.360
Denmark	196,1%	-2.727	-1.395	7.000	2.364	5.558	5.456	3.917
France	14,4%	-61.682	-103.016	405.603	354.430	380.280	368.757	338.304
Germany	123,5%	-55.140	-37.451	252.029	112.786	241.990	227.370	239.910
Italy	81,1%	-219.310	-177.211	913.478	504.452	933.922	897.466	962.008
Poland	102,6%	-275.000	-196.000	940.000	464.000	799.000	804.000	724.000
Portugal		0	0					
Spain (Catalonia)	16,6%	-26.679	-35.140	145.639	124.926	164.354	120.596	132.506
Switzerland	111,3%	-8.560	-7.072	46.069	21.798	40.375	39.827	40.404
The Netherlands	32,0%	-23.746	-20.507	102.741	77.817	132.142	138.013	146.754
United Kingdom**	32,9%	-17.137	-17.778	64.367	48.422	31.540	65.200	60.100
<b>TOTAL</b>	<b>-100,0%</b>	<b>-726.400</b>	<b>-614.618</b>	<b>3.098.455</b>	<b>1.781.016</b>	<b>2.827.360</b>	<b>2.900.953</b>	<b>2.894.684</b>

Stocks are 74% up last year  
and only "8-9%" up trends 2017-2016-2015

## Stock depletion by months

in T	2017/2018	2018/2019	DIFF
Dec	560.459	892.063	331.604
Jan	515.372	533.269	17.897
Feb	637.326	776.845	139.519
March	614.618	726.400	111.782



# Stock Apple EU by varieties (March 2019)



Variety (Ton)	%2019/2018	Moved 2019	Moved 2018	01-03-19	01-03-18	01-03-17	01-03-16	01-03-15
Annurca		-5.000	-5.000	0	0	0	0	0
Boskoop	2321,1%	-4.980	-1.022	10.338	427	9.026	9.780	11.243
Braeburn	99,1%	-21.896	-24.436	112.956	56.747	94.955	105.906	95.329
Bramley	4,0%	-2.905	-3.000	26.000	25.000	5.480	22.000	38.000
Cameo	406,5%	-463	-602	1.793	354	0	1.500	0
Cortland		0	0	0	0	0	0	0
Cox Orange	680,8%	-2.433	-1.817	1.827	234	2.100	5.290	951
Cripps Pink	25,4%	-42.405	-38.475	106.222	84.696	108.224	90.214	102.202
Elstar	61,2%	-26.883	-20.740	67.994	42.192	74.563	82.393	94.936
Fuji	42,2%	-22.531	-25.485	114.515	80.556	101.495	120.183	106.298
Gala	96,7%	-101.540	-78.323	214.074	108.845	119.633	121.705	114.917
Gloster	1,3%	-15.461	-15.118	66.241	65.410	65.748	61.394	63.022
Golden Delicious	42,2%	-111.466	-119.687	829.085	583.025	936.823	911.115	955.447
Granny Smith	1,1%	-28.749	-30.760	113.720	112.520	102.670	125.012	115.799
Holsteiner Cox		-932	-190	150	0	300	335	568
Idared	143,2%	-43.944	-33.193	256.799	105.586	235.786	260.909	219.200
Jonagold	139,6%	-31.941	-17.552	183.493	76.571	186.215	214.714	229.330
Jonagored	270,5%	-7.438	-3.437	77.734	20.983	70.933	77.094	97.029
Jonathan		0	0	0	0	0	0	12
Lobo		0	0	0	0	0	0	0
Morgendurf/imperat	84,2%	-3.233	-3.657	10.760	5.840	11.542	13.492	19.319
Pinova	471,2%	-12.947	-7.697	49.444	8.656	13.620	15.813	15.962
Red Delicious	59,4%	-35.386	-27.843	125.781	78.891	120.127	110.387	104.465
Red Jonaprince	67,7%	-55.224	-3.203	58.253	34.743	51.419	30.421	29.472
Reinette	306,8%	-7.342	-5.956	24.179	5.944	17.453	18.999	18.444
Shampion	117,7%	-41.290	-40.917	131.408	60.370	111.929	112.512	102.032
Stayman	46,3%	-344	-760	2.480	1.695	6.154	6.027	6.896
Spartan		34.956	-4	35.099	0	11	25	0
Other new varieties*	77,7%	-19.818	-19.785	94.495	53.173	71.558	73.064	78.703
Other	127,6%	-114.805	-85.960	383.616	168.557	309.596	310.670	275.106
<b>Total</b>	<b>74,0%</b>	<b>-726.400</b>	<b>-614.618</b>	<b>3.098.455</b>	<b>1.781.016</b>	<b>2.827.360</b>	<b>2.900.953</b>	<b>2.894.684</b>

## Compared to trend 2015-2017:

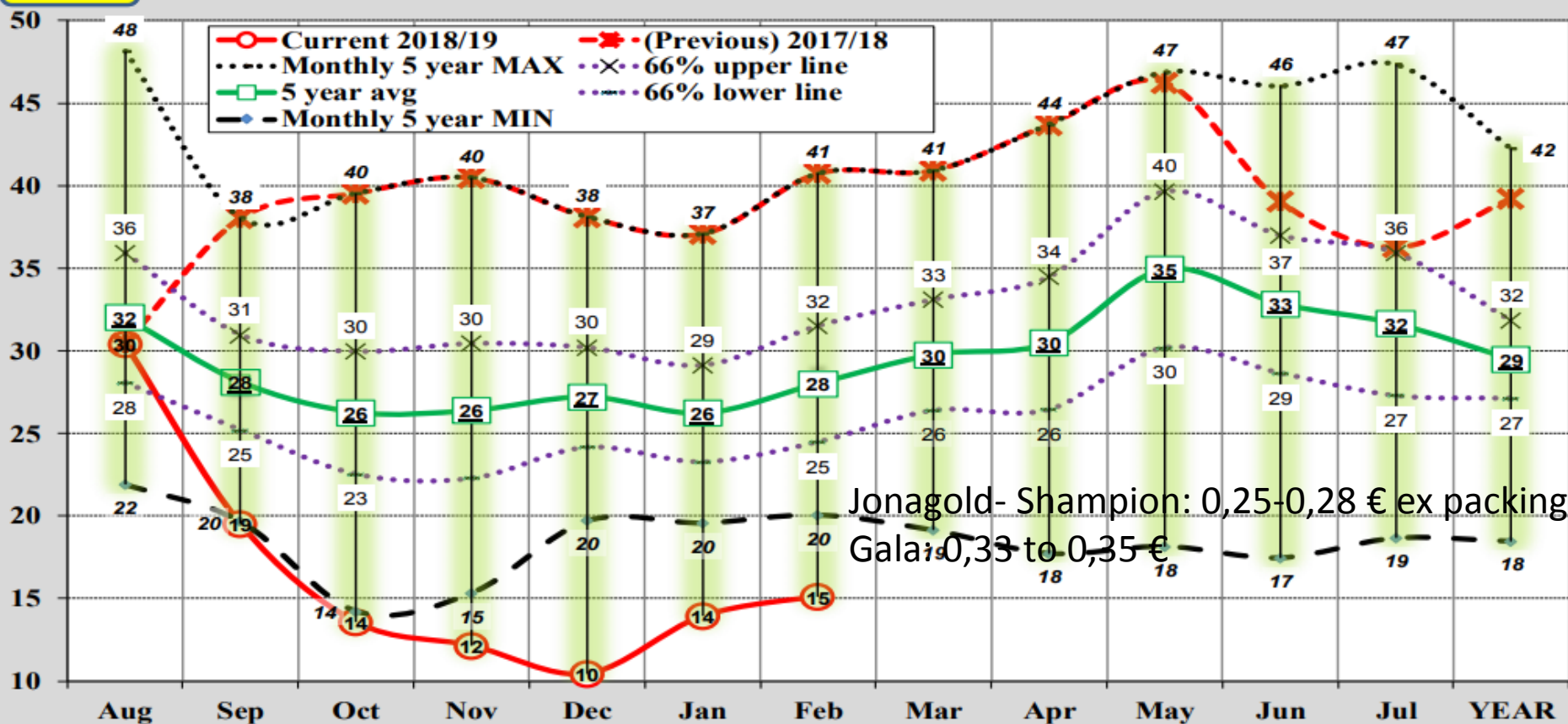
Braeburn: +12%  
 Cripps: =  
 Fuji : +5%  
 Gala: +78%  
 Golden: -11%  
 Idared: +8 %  
 Jonagold: - 15%  
 Jonagored: =  
 Pinova: +225%  
 Red Del: +8%  
 Red Jonapr: +50%  
 Shampion: +19%

# Price trends



€/100 kg

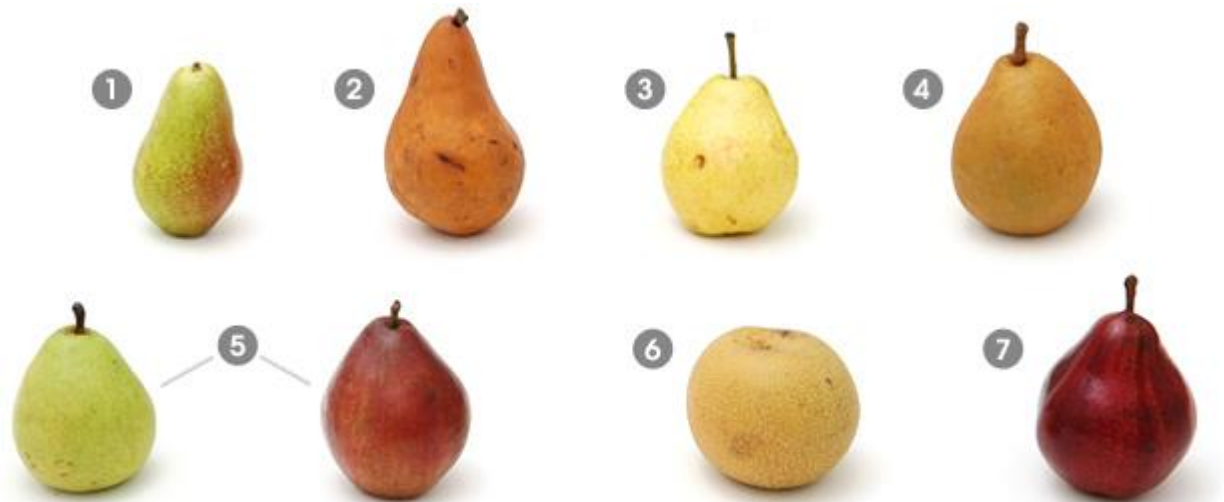
## Apple prices in Poland (€/100kg=Euro cents/kg)



Jonagold- Champion: 0,25-0,28 € ex packing  
 Gala: 0,33 to 0,35 €



# NH Pears 2018/2019





# Pear Production EU



x 1000 tons

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	F2018	(1)	(2)
Belgium	307	285	295	236	315	374	369	322	310	370	19	11
Croatia	5	6	6	2	3	2	2	1	6	7	27	156
Czech Rep	6	3	3	6	7	4	10	7	4	8	102	18
Denmark	7	6	5	5	6	6	6	6	5	6	20	6
France	202	164	176	124	154	131	155	138	133	134	1	-6
Germany	52	39	47	34	34	45	43	35	23	31	35	-8
Greece	43	54	36	42	32	37	60	47	59	57	-4	2
Hungary	40	36	21	25	36	40	33	38	35	38	10	9
Italy	858	680	934	650	726	736	764	681	738	730	-1	0
Latvia	0	0	0	0	0	1	0	0	0	0	-30	-28
Netherlands	301	274	336	199	327	349	349	374	330	402	22	15
Poland	90	40	55	45	65	50	80	55	40	70	75	20
Portugal	198	172	210	115	162	203	134	113	186	162	-13	12
Romania	24	20	28	19	24	17	13	16	12	23	85	61
Slovakia	1	1	1	0	1	0	1	0	1	1	52	84
Slovenia	6	6	4	3	3	4	4	1	0	4	1.068	137
Spain	429	456	461	355	403	400	344	311	331	311	-6	-5
Sweden	2	1	2	1	1	1	1	1	1	2	150	150
UK	31	33	32	28	26	25	23	24	23	23	0	-1
<b>Total:</b>	<b>2.603</b>	<b>2.276</b>	<b>2.652</b>	<b>1.888</b>	<b>2.327</b>	<b>2.425</b>	<b>2.392</b>	<b>2.171</b>	<b>2.237</b>	<b>2.379</b>	<b>6</b>	<b>5</b>

EU crop up by 6%

- NL & BE highest ever
- Average crop in South (IT, ES, PT,...) and FR

# Pear Production EU – varieties



											x 1000 tons	
Variety	2009	2010	2011	2012	2013	2014	2015	2016	2017	F2018	(1)	(2)
Abate F	306	224	404	256	304	358	333	296	328	319	-3	0
Blanquilla	86	81	78	59	54	49	44	40	43	41	-4	-2
Conference	903	832	928	693	894	952	965	908	871	993	14	9
Coscia-Ercollini	106	98	80	77	80	66	79	67	79	74	-7	-2
Doyenne du Comice	116	97	107	58	83	94	86	82	59	82	40	9
Durondeau	8	6	7	5	6	6	5	3	2	3	38	-6
Guyot	102	92	96	70	80	67	74	59	65	59	-11	-11
Kaiser	65	42	60	39	54	33	45	38	43	46	7	9
Passacrassana	19	15	17	17	14	11	12	11	9	9	1	-13
Rocha	197	171	209	115	162	203	134	113	186	162	-13	12
William BC	312	286	332	252	283	278	283	261	263	272	3	1
Other	382	331	333	246	315	308	330	292	287	319	11	5
<b>Total:</b>	<b>2.603</b>	<b>2.276</b>	<b>2.652</b>	<b>1.888</b>	<b>2.327</b>	<b>2.425</b>	<b>2.392</b>	<b>2.171</b>	<b>2.237</b>	<b>2.379</b>	<b>6</b>	<b>5</b>

EU varieties:

- Conference highest ever close to 1 Mio T => 41% of EU crop
- Abate stable around 300,000 T

# Pear Production USA



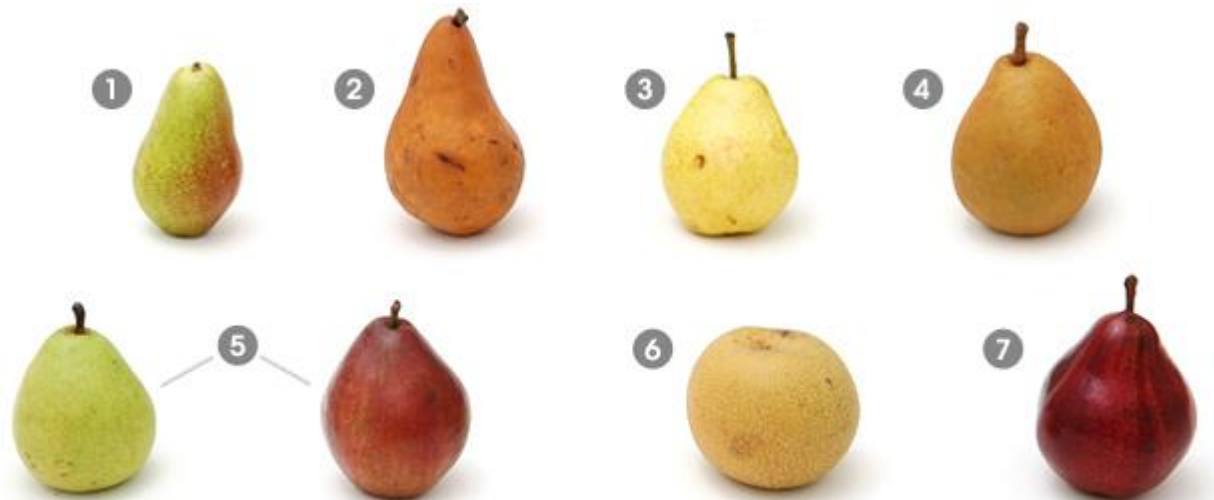
## USA

*x 1000 tons*

<b>Variety</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>F2018</b>	<b>(1)</b>	<b>(2)</b>
Anjou	222	202	228	205	232	224	194	166	169	202	19	14
Bartletts / William B	378	361	371	356	363	336	347	333	303	316	4	-4
Bosc	69	61	82	65	75	62	70	70	53	78	46	21
Doyenne du Comice	6	6	6	5	6	5	4	6	3	5	43	9
Red Anjou	19	19	19	20	22	22	19	20	20	21	6	7
Seckel	1	2	2	1	1	1	1	1	1	1	11	2
Other Reds	1	0	1	1	7	8	10	9	8	9	4	-5
Other Varieties	11	9	12	13	6	5	3	4	3	4	24	8
<b>Total USA:</b>	<b>707</b>	<b>660</b>	<b>720</b>	<b>666</b>	<b>711</b>	<b>663</b>	<b>648</b>	<b>608</b>	<b>561</b>	<b>634</b>	<b>13</b>	<b>5</b>

On the rise compared to last year and 3 year average

# NH stocks pears 2018/2019



# Stock Pear USA ( March 2019)



Pear Stocks (Ton)	%2019/2018	Moved 2019	Moved 2018	01-03-19	01-03-18	01-03-17	01-03-16	01-03-15
Anjou	14,9%	-23.259	-20.978	93.132	81.035	67.731	64.917	84.952
Bosc	137,1%	-10.122	-9.007	26.856	11.327	18.926	15.199	12.780
Red Anjou	34,3%	-2.454	-3.208	9.828	7.317	7.628	4.285	8.310
Comice	899,9%	-458	-231	390	39	220	28	200
Concorde	151,2%	-108	-66	33	13	0	2	0
Seckel	159,6%	-142	-78	122	47	141	0	45
Forelle	1566,7%	-145	-2	50	3	29		
Other Reds		0	0				0	0
Other Winter Varieties	-18,5%	-39	-40	42	51	50	34	165
Northwest Bartletts (Williams)	86,1%	-8.093	-3.642	1.091	586	469	12	394
<b>TOTAL</b>	<b>31,0%</b>	<b>-44.820</b>	<b>-37.252</b>	<b>131.542</b>	<b>100.418</b>	<b>95.194</b>	<b>84.477</b>	<b>106.846</b>

Stocks are 30% higher this year compared to last year while crop is 13% up

# Stock Pear EU (March 2019)



Pear Stocks (Ton)	%2018/2017	Moved 2019	Moved 2018	01-03-19	01-03-18	01-03-17	01-03-16	01-03-15
Belgium	77,7%	-42.152	-36.240	151.001	84.957	111.713	133.080	116.965
Czech Republic	47,9%	-137	-112	1.402	948	711	919	108
Denmark		-42	0	260	0	22	72	5
France	39,1%	-2.789	-2.891	4.333	3.115	3.558	3.747	4.208
Germany	12,6%	-831	-561	1.197	1.063	158	322	992
Italy	-16,7%	-45.656	-57.161	102.128	122.663	88.544	117.189	105.540
Poland		-6.000	-1.000	2.000	0	0	3.000	0
Portugal*	14,2%	41.335	36.205	41.335	36.205	27.028	16.378	41.422
Spain (Catalonia)	-13,4%	-13.139	-13.502	40.096	46.276	39.307	41.620	50.091
Switzerland	58742,9%	-2.103	-138	4.119	7	2.033	1.865	3.594
The Netherlands	21,4%	-40.274	-27.052	146.914	121.004	133.337	136.192	126.294
United Kingdom**	-22,8%	-2.211	-2.292	2.812	3.641	3.750	4.600	3.500
<b>TOTAL</b>	<b>18,5%</b>	<b>-114.000</b>	<b>-104.744</b>	<b>497.597</b>	<b>419.879</b>	<b>410.160</b>	<b>458.984</b>	<b>452.718</b>

Variety (Ton)	%2019/2018	Moved 2019	Moved 2018	01-03-19	01-03-18	01-03-17	01-03-16	01-03-15
Abate Fetel	-22,7%	-28.762	-39.444	63.972	82.766	56.636	63.566	65.796
Alexandrina	-42,5%	-1.163	-997	1.211	2.105	2.528	954	1.614
Blanquilla	-35,9%	-1.948	-1.951	3.402	5.310	5.248	3.573	8.111
Conference	28,4%	-92.264	-77.591	347.242	270.357	293.292	337.428	309.229
Doyenne du comice	245,6%	-8.917	-4.326	5.815	1.683	2.801	5.737	5.480
Kaiser	-20,4%	-5.361	-6.079	9.279	11.662	7.826	16.380	5.832
Rocha	14,2%	41.335	36.205	41.335	36.205	27.028	16.378	41.422
Other	158,8%	-16.920	-10.562	25.341	9.791	14.802	14.967	15.233
<b>Total</b>	<b>18,5%</b>	<b>-114.000</b>	<b>-104.744</b>	<b>497.597</b>	<b>419.879</b>	<b>410.160</b>	<b>458.984</b>	<b>452.718</b>

Stocks are 18,5% higher this year compared to last year while crop is % up



# International apple and pear market review

## Southern Hemisphere Apples



# Consolidated SH crop forecast (country)



## Apples

*x 1000 tons*

<b>Country</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>F2019</b>	<b>(1)</b>	<b>(2)</b>
<b>Argentina</b>	1.576	920	840	776	744	760	774	545	557	608	9	-3
<b>Australia</b>	255	260	293	289	275	309	301	306	292	318	9	6
<b>Brazil</b>	1.226	1.250	1.184	1.063	1.165	1.145	826	1.329	1.094	1.150	5	6
<b>Chile</b>	1.755	1.784	1.806	1.746	1.670	1.708	1.635	1.675	1.761	1.665	-5	-1
<b>New Zealand</b>	448	513	476	550	478	554	539	506	576	591	3	9
<b>South Africa</b>	775	768	813	907	794	924	902	940	884	928	5	2
<b>Total</b>	<b>6.036</b>	<b>5.495</b>	<b>5.412</b>	<b>5.331</b>	<b>5.126</b>	<b>5.400</b>	<b>4.977</b>	<b>5.300</b>	<b>5.165</b>	<b>5.261</b>	<b>2</b>	<b>2</b>

*(1) Percentage difference between F2019 and 2018*

*(2) Percentage difference between F2019 and the average of 2016- 2017 - 2018*

# Consolidated SH crop forecast (varieties)



*x 1000 tons*

<b>Variety</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>F2019</b>	<b>(1)</b>	<b>(2)</b>
<b>Braeburn</b>	212	212	209	165	135	142	126	119	122	113	-7	-7
<b>Cripps pink</b>	229	245	339	364	362	429	396	385	408	411	1	4
<b>Fuji</b>	729	689	708	672	749	700	636	941	676	826	22	10
<b>Gala</b>	1.762	1.892	1.835	1.845	1.796	1.984	1.746	1.968	2.096	1.949	-7	1
<b>Golden Delicious</b>	169	166	210	232	159	232	224	234	215	224	5	0
<b>Granny Smith</b>	1.739	805	663	650	582	579	534	507	476	491	3	-3
<b>Red Delicious</b>	725	960	902	819	770	810	824	669	664	683	3	-5
<b>Others</b>	471	527	547	585	572	523	492	477	507	563	11	14
<b>Total:</b>	<b>6.036</b>	<b>5.495</b>	<b>5.412</b>	<b>5.331</b>	<b>5.126</b>	<b>5.400</b>	<b>4.977</b>	<b>5.300</b>	<b>5.165</b>	<b>5.261</b>	<b>2</b>	<b>2</b>

*(1) Percentage difference between F2019 and 2018*

*(2) Percentage difference between F2019 and the average of 2016 - 2017 - 2018*

# Consolidated SH apples export forecast



<b>Country (MT)</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>F2019</b>	<b>(1)</b>	<b>(2)</b>
Argentina	118,116	101,200	90,300	102,100	111,000	9%	13%
Australia	3,600	5,136	4,625	4,671	4,805	3%	0%
Brazil	60,112	30,637	55,437	71,000	75,000	6%	43%
Chile	611,759	741,951	659,573	774,710	732,556	-5%	1%
New Zealand	330,513	348,221	338,921	372,373	401,797	8%	14%
South Africa	413,292	425,325	417,794	393,344	413,506	5%	0%
<b>Total</b>	<b>1,537,392</b>	<b>1.652.769</b>	<b>1.625.865</b>	<b>1.718.198</b>	<b>1.738.664</b>	<b>1%</b>	<b>4%</b>



Slight delays in picking

MT	Market	2017	2018	F2019
Production		<b>544.500</b>	<b>557.300</b>	<b>608.200</b>
Market offer	Export	90.300	102.100	111.000
	Domestic	270.300	285.600	310.400
	Import Industry	183.900	168.400	183.100
Population (000)		40.000.000		
Fresh consumption (kg/hab)		6,75 kg /cap	7,14 kg/cap	7,75 kg/cap



Good climatic conditions, higher t°

MT	Market	2017	2018	F2019
Production		<b>1.329</b>	<b>1.094</b>	<b>1.150</b>
Market offer	Export	55	71	75
	Domestic	1.274	1.023	1.075
	Import	78	75	70
	Domestic fresh offer	1.352	1.098	1.145
	Industry	292	197	230
Population (000)		208.285	209.045	210.000
Fresh consumption (kg/hab)		5.09	4,31	4.36



Decrease by 5%, with planned market diversification out of EU

MT	Market	2017	2018	F2019
Production		<b>1.499.030</b>	<b>1.760.705</b>	<b>1.664.900</b>
Market offer	Export	659.573	774.710	732.556
	Domestic	299.806	352.141	332.980
	Industry	539.651	633.854	599.364
Total		1.499.030	1.760.705	1.664.900



Drought , heat and hail compensated by higher granny and new varieties



Ideal weather conditions for the crop



Paartial recovery of last year drought

MT	Market	2017	2018	F2019
Production		<b>313.703</b>	<b>292.361</b>	<b>318.121</b>
Market offer	Export	4.625	4.671	4.805
	Domestic	308.126	287.690	313.316
	Import	1.227	723	950
	Domestic fresh offer	253.279	229.868	250.506
	Industry	54.847	57.822	62.810
Population (000)		24,590	24.770	25.089
Fresh consumption (kg/hab)		10.3	9,3	10.0

MT	Market	2017	2018	F2019
Production		<b>506.043</b>	<b>576.229</b>	<b>591.107</b>
	Export	338.921	372.373	401.797
	Domestic	63.368	67.243	67.992
	Import	482	200 (est)	300 (est)
	Domestic fresh offer	63.850	67.443	68.292
	Industry	103.754	136.613	131.318
Population (000)		4.706	4.750	4.774 (est)
Fresh consumption (kg/hab)		13.6	14.2	14.3

MT	Market	2017	2018	F2019
Production		<b>940.346</b>	<b>883.925</b>	<b>928.122</b>
Market offer	Export	417.794	393.344	413.506
	Domestic	209.631	192.861	202.504
	Import	551	507	487
	Domestic fresh offer	210.182	193.367	202.991
	Industry	312.921	294.146	308.853
Population (000)		56.747.000	57.398.000	57.759.000
Fresh consumption (kg/hab)		3.7	3.37	3.51





# EU 2018 import of apples from SH after low EU 2017 crop



	2018	2017
<b>Total</b>	<b>485.047,80</b>	<b>374.898,70</b>
Chile	187.105,70	120.945,70
New Zealand	137.811,90	119.452,20
South Africa	105.831,10	87.488,70
Brazil	29.530,40	28.781,30
Argentina	24.026,70	17.629,20
Australia	742,00	601,60

*Data based on Eurostat, in metric tonnes*

# International apple and pear market review

## Southern Hemisphere Pears



# SH pears production forecast



## Pears

*x 1000 tons*

<b>Country</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>F2019</b>	<b>(1)</b>	<b>(2)</b>
<b>Argentina</b>	576	731	743	801	702	782	815	578	579	600	4	-9
<b>Australia</b>	107	130	124	129	107	104	100	102	105	98	-7	-4
<b>Chile</b>	170	194	189	200	170	188	177	149	185	193	4	13
<b>New Zealand</b>	11	11	9	12	10	12	12	11	14	13	-2	9
<b>South Africa</b>	356	360	361	379	399	415	432	436	423	423	0	-2
<b>Total</b>	<b>1.220</b>	<b>1.427</b>	<b>1.426</b>	<b>1.521</b>	<b>1.388</b>	<b>1.500</b>	<b>1.535</b>	<b>1.276</b>	<b>1.305</b>	<b>1.327</b>	<b>2</b>	<b>-3</b>

*(1) Percentage difference between F2019 and 2018*

*(2) Percentage difference between F2019 and the average of 2016 - 2017 - 2018*

# SH pear forecast by varieties



*x 1000 tons*

<b>Variety</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>F2019</b>	<b>(1)</b>	<b>(2)</b>
<b>Beurre Bosc</b>	34	38	32	38	33	30	13	13	13	13	2	3
<b>Forelle</b>	90	101	107	115	120	132	139	110	113	114	1	-5
<b>Packham's T</b>	445	498	489	513	436	505	526	439	450	460	2	-2
<b>Williams BC</b>	422	491	487	519	488	478	490	383	387	396	2	-6
<b>Others</b>	229	298	312	336	309	354	367	331	342	343	0	-1
<b>Total:</b>	<b>1.220</b>	<b>1.427</b>	<b>1.426</b>	<b>1.521</b>	<b>1.388</b>	<b>1.500</b>	<b>1.535</b>	<b>1.276</b>	<b>1.305</b>	<b>1.327</b>	<b>2</b>	<b>-3</b>

*(1) Percentage difference between F2019 and 2018*

*(2) Percentage difference between F2019 and the average of 2016- 2017 - 2018*

# Consolidated SH export forecast



<b>Country (MT)</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>F2019</b>	<b>(1)</b>	<b>(2)</b>
Argentina	343,030	334,200	301,600	337,900	350,400	4%	8%
Australia	10,000	9,841	9,111	12,034	10,321	-14%	0%
Chile	139,318	125,022	148,849	129,541	134,843	4%	0%
New Zealand	4,561	4,560	3,595	4,816	5,006	4%	16%
South Africa	192,009	222,192	218,426	212,149	211,584	0%	-3%
<b>Total</b>	<b>688,524</b>	<b>695,475</b>	<b>670,082</b>	<b>696,440</b>	<b>712,154</b>	<b>2%</b>	<b>4%</b>



MT	Market	2017	2018	F2019
Production		<b>577.500</b>	<b>578.800</b>	<b>600.200</b>
Market offer	Export	301.600	337.900	350.400
	Domestic	102.000	111.400	115.500
	Industry	174.000	132.500	137.400
Population (000)		40.000.000		
Fresh consumption (kg/hab)		2,55 kg/cap	2,77 kg /cap	2,87 kg/cap



MT	Market	2017	2018	F2019
Production		<b>212.641</b>	<b>185.059</b>	<b>192.633</b>
Market offer	Export	148.849	129.541	134.843
	Domestic	21.264	18.506	19.263
	Industry	42.528	37.012	38.527
Total		212.641	185.059	192.633



MT	Market	2017	2018	F2019
Production		<b>97.589</b>	<b>104.563</b>	<b>97.616</b>
Market offer	Export	9.111	12.034	10.321
	Domestic	88.478	92.529	87.295
	Import	1.980	1.756	1.832
	Domestic fresh offer			59.448
	Industry	57.375	62.826	
Population (000)		24.590	24.770	25.089
Fresh consumption (kg/hab)		2.3	2,5	2,4



MT	Market	2017	2018	F2019
Production		<b>11.474</b>	<b>13.711</b>	<b>13.392</b>
Market offer	Export	3.595	4.816	5.006
	Domestic	4.366	6.713	5.930
	Import	4.559	3.500 (est)	4.000 (est)
	Domestic fresh offer	8.925	10.213	9.930
	Industry	3.513	2.182	2.456
Population (000)		4.706	4.750	4.774 (est)
Fresh consumption (kg/hab)		1.9	2.1	2.1



MT	Market	2017	2018	F2019
Production		<b>435.933</b>	<b>422.855</b>	<b>722.728</b>
Market offer	Export	218.426	212.149	211.584
	Domestic	47.108	45.483	45.470
	Import	218	211	211
	Domestic fresh offer	47.108	45.695	45.681
	Industry	170.617	165.498	165.449
Population (000)		56.747	57.398	57.759
Fresh consumption (kg/hab)		0.83	0,8	0,79



# EU 2018 import of SH pears



	2018	2017
<b>Total</b>	<b>172.646,10</b>	<b>192.021,00</b>
South Africa	73.768,80	88.779,40
Argentina	52.710,10	45.973,10
Chile	45.600,60	56.835,60
New Zealand	420,30	430,50
Australia	122,60	0,40
Brazil	23,70	2,00

*Data based on Eurostat, in metric tonnes*



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

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

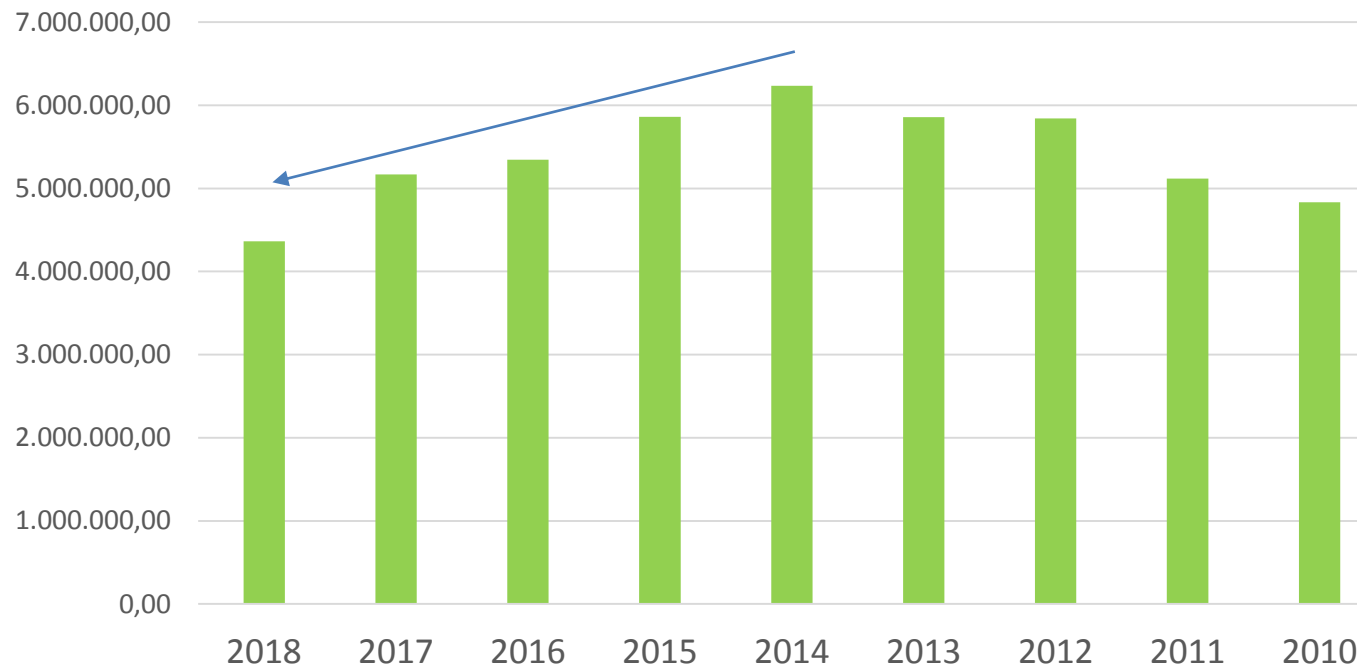
[www.freshfel.org](http://www.freshfel.org)

# Export policy & market access

# EU exports F&V ( in T)

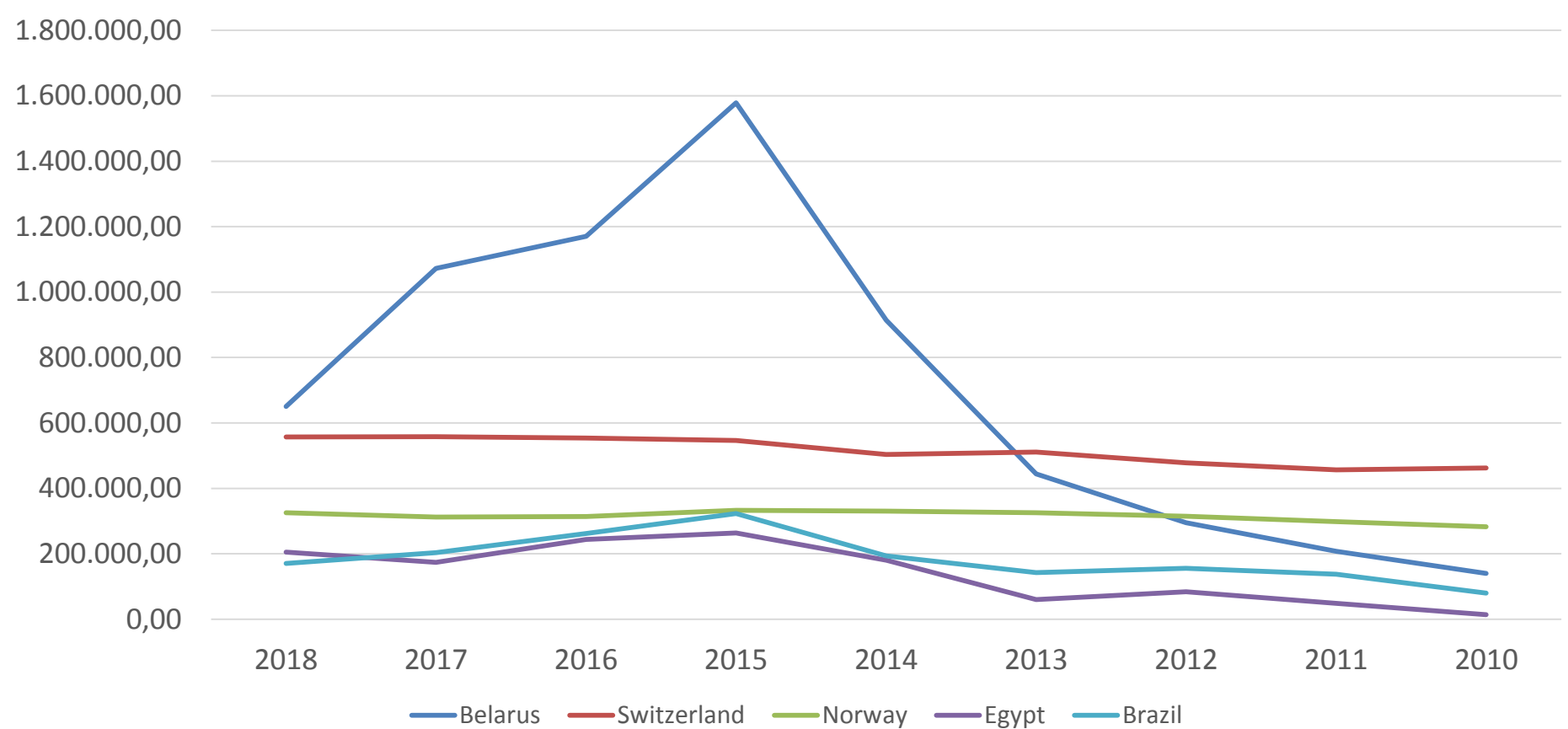


Decline but some growth since 2010

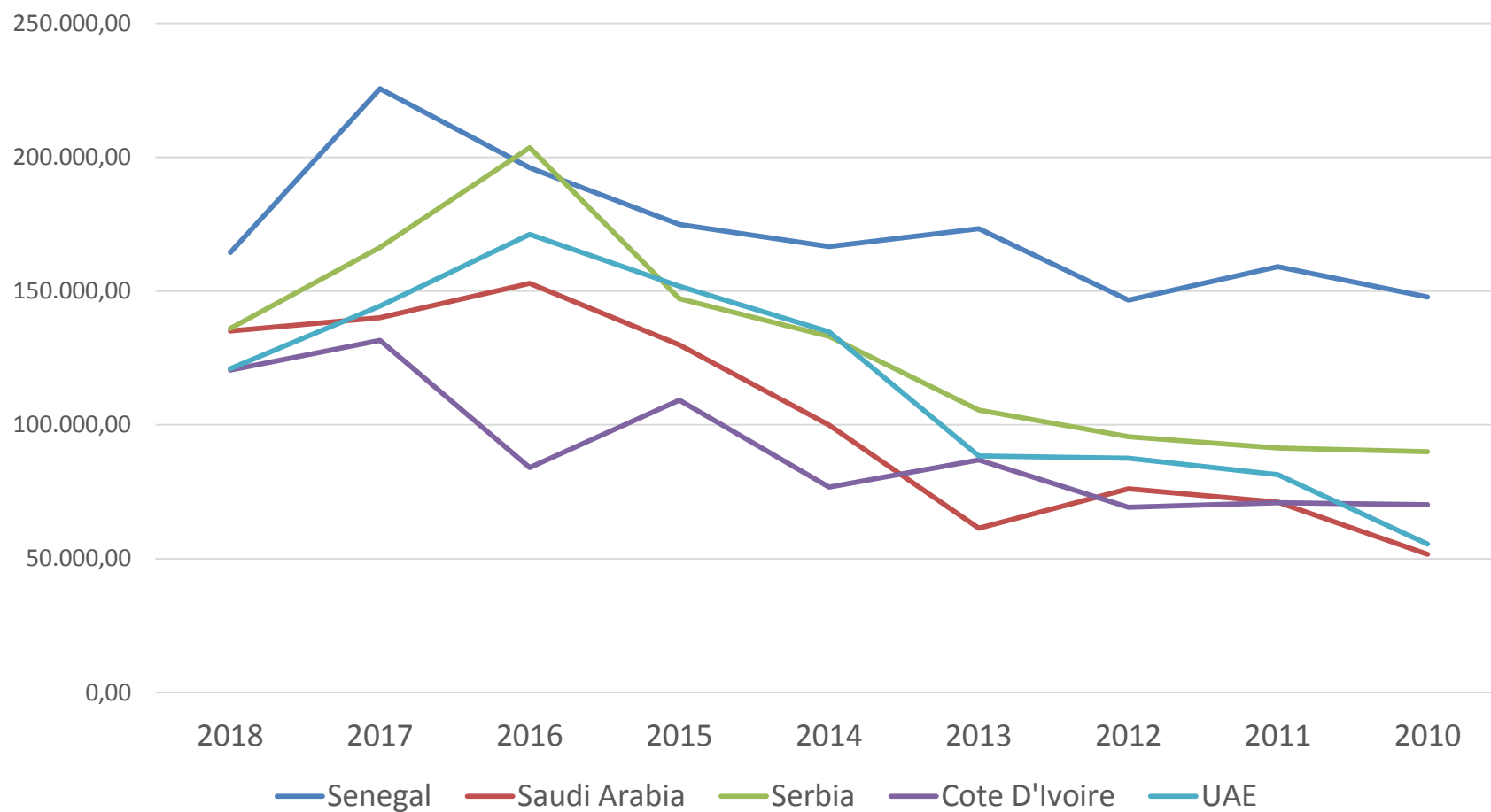


China	231%	35.000
Qatar	231%	25.000
India	217%	40.000
Indonesia	214%	25.000
Kosovo	207%	15.000
Morocco	194%	80.000
Canada	185%	100.000
Gambia	183%	25.000
Haiti	176%	15.000
Egypt	166%	220.000
Cote D'Ivoire	153%	120.000
Saudi Arabia	153%	145.000
Guinea	153%	70.000
Congo	147%	14.000
Sierra Leone	144%	20.000
Israel	144%	35.000
Jordan	142%	55.000
Mali	134%	20.000
Mauritania	131%	80.000
Iceland	128%	25.000
Switzerland	124%	550.000
Norway	119%	325.000
UAE	117%	160.000
Serbia	116%	175.000
Bosnia Herz	108%	100.000
Senegal	106%	180.000
Brazil	102%	230.000

# Main destination Top 5



## Main destinations: 6 to 10



# Policy state of play



Loss of neighbouring  
“safe bank”

Wave of unilateralism

Complexity of SPS issues &  
market access

Limited benefits of FTAs

Tariff & Quantitative  
restrictions



# Way forward within FTA

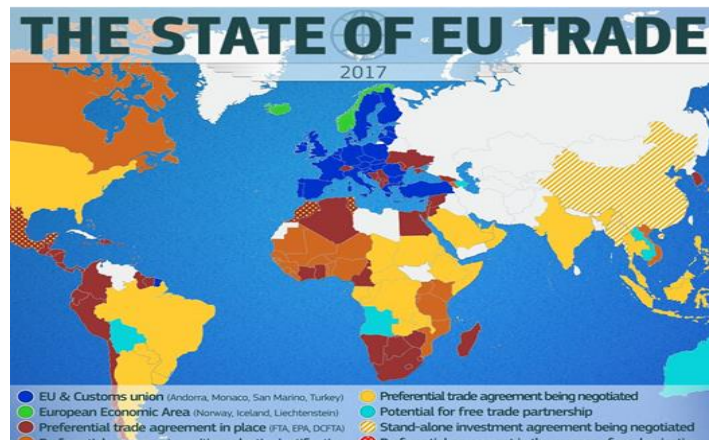


## FTAs NEGOTIATION: enhancing their potential in the area of SPS:

- CETA model : Removal of pre-clearance
- Mexico model: Introduction of timelines & fast-track market access (MA) applications
- USA Apples & Pears: Bundling of protocols into EU application
- Single Entity: Securing equal treatment for all Member States
- We have a dream.... Removal of protocols & substitution for Regulated Pests Lists & Mutual Recognition with FTA partners

## FTAs IMPLEMENTATION: converting political commitment into effective implementation:

- MS + EC + EU Del. + Industry cooperation to jointly push for priority MA barriers
- Use of “Technical consultations” SPS provisions in FTAs to push for progress in EU MA applications
- Enhance dialogue and build trust with partners at technical level through concrete initiatives to solve priority, concrete issues for both parties (e.g. CAN Methyl Bromide)
- Keeping the “dispute settlement option” on the table (e.g. Algeria ban/super-tariff dossier...)



- Slow, product-by-product protocol negotiations. Priority pending applications:
  - BE, DE, ES, FR, IT, NL, PL, PT: Apples and Pears Protocol with the **US** (pending since 2009)
  - IT: **Vietnam, Taiwan, Thailand and China**
  - FR: Mexico, Japan, Australia, New Zealand, Peru
  - ES: Mexico, Cuba, Vietnam, Taiwan, China
  - BE: Vietnam, Colombia, Mexico, Philippines, Thailand, Chili, Brazil
  - NL: China, Brazil, and Thailand
  - DE: China, India, Vietnam, South Korea, Thailand, Brazil, South Africa and Taiwan.
  - PL: Thailand
- Strict protocol conditions rendering exports unprofitable & imposition of new conditions (e.g. Indonesia – Laboratory Registration; Thailand – Strict transport conditions; fire blight, Canada protocols for new trade, methylbromide)
- No recognition of the EU as a Single Entity & imposition of different conditions on protocols from individual EU Member States



# EU apple export trends: Shrinking markets or new boost?

EU Apple export volume **per season** (T)



## Export trends

- Season 2014/2015 peak of close to 1.8 mln T down to less than 1.45 mln T in 2016/2017 season
- Impact of Russian embargo & other neighbourhood market restrictions (Algeria)
- Current season? Largest ever crop & export market shrinking – To reach 1,2 Mio T ???



# Evolution by destination and MS ( apples)

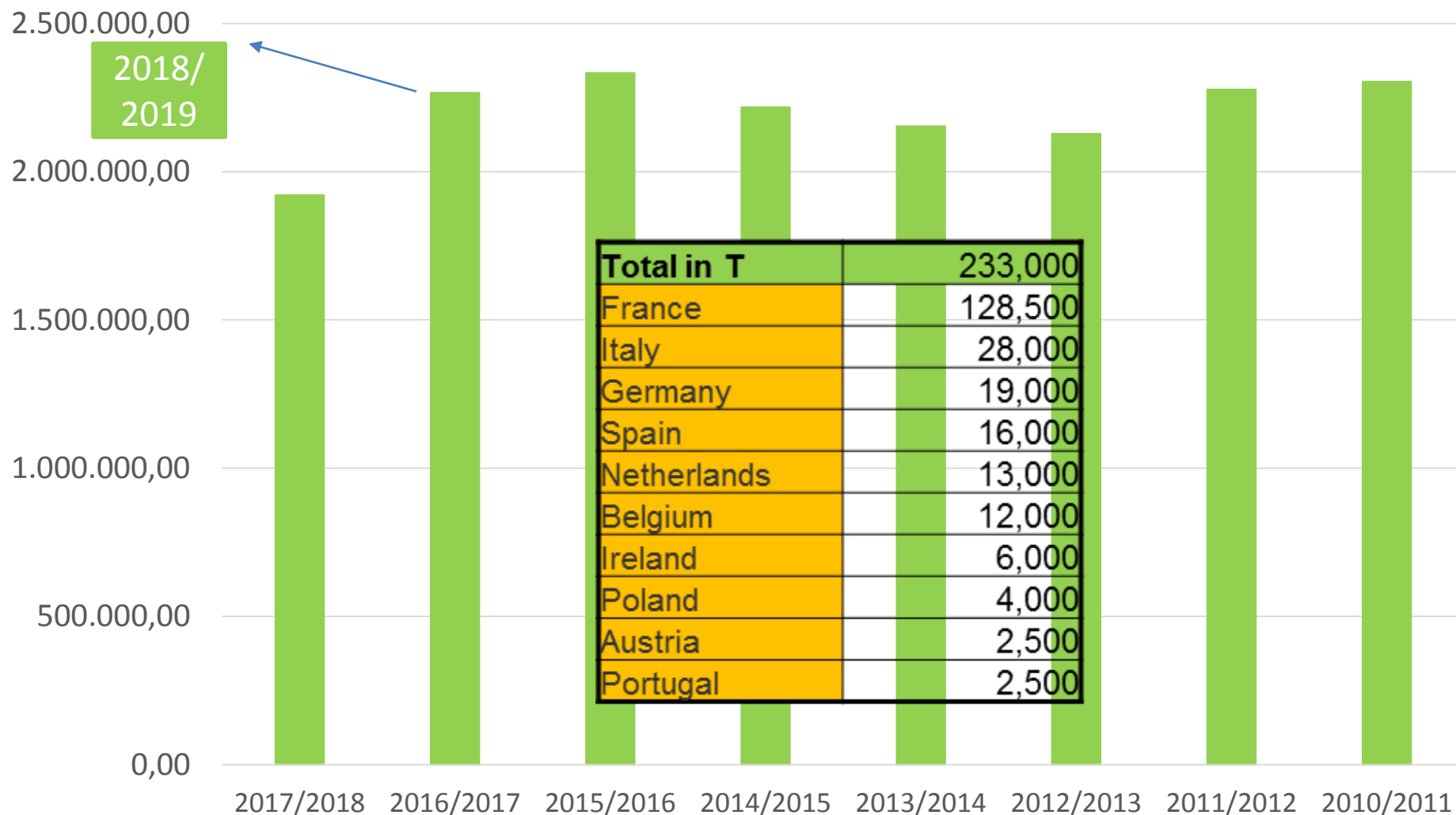
Sept -Nov	2018	2017	2016	2015	2014
<b>Total</b>	<b>284.796,40</b>	<b>290.526,60</b>	<b>469.906,30</b>	<b>486.731,10</b>	<b>521.065,90</b>
Egypt	82.004,00	35.782,50	51.594,80	113.173,10	85.834,10
Saudi Arabia	34.934,00	36.222,10	50.683,50	45.421,30	32.605,80
Jordan	18.746,20	14.145,80	16.584,20	14.022,70	11.694,50
UAE	16.267,70	19.805,30	33.795,90	34.891,70	35.718,80
Belarus	15.750,00	42.879,00	104.815,80	100.394,50	108.249,60
Kazakhstan	11.654,20	12.392,50	19.835,50	13.808,70	20.708,40
Brazil	11.350,60	16.486,70	48.654,60	12.968,90	22.313,40
Switzerland	7.600,70	11.118,70	10.401,80	7.391,70	9.145,40
Norway	7.158,40	11.637,50	12.451,50	14.161,80	12.666,50
Colombia	5.067,20	7.782,30	9.611,70	8.580,20	5.223,40
Libya	4.784,70	3.105,40	4.588,30	12.762,80	20.752,10
Israel	4.725,40	4.907,50	5.765,60	6.152,20	3.001,70
Qatar	4.569,70	4.742,20	4.801,30	4.052,60	3.480,40
Oman	3.988,80	4.184,50	4.199,00	4.803,00	1.923,00
China	3.703,50	583,40	1.495,80	2.143,70	2.845,50
Viet-Nam	3.114,80	3.915,80	3.030,90	698,90	69,30
Malaysia	3.111,40	3.342,50	4.945,70	5.257,30	5.700,60
Thailand	3.099,70	4.260,50	4.476,20	4.470,70	3.484,00
Singapore	3.080,30	3.550,60	4.070,00	4.691,70	5.795,20
Kuwait	2.972,10	2.086,70	3.423,00	2.952,80	3.386,70
India	2.866,20	4.374,90	8.144,10	4.564,40	4.268,00

	2018	2017	2016	2015	2014
<b>Total</b>	<b>284.796</b>	<b>290.527</b>	<b>469.906</b>	<b>486.731</b>	<b>521.066</b>
Italy	93.834	81.913	144.119	153.365	168.971
Poland	83.565	71.553	150.107	50.711	95.920
France	43.125	60.640	70.616	96.278	101.043
Greece	28.625	19.672	34.708	47.587	31.026
Spain	14.127	24.215	34.636	24.796	22.337
Portugal	5.378	13.990	9.787	10.594	10.456

# EU Intra-trade apples



Intra EU & Brexit





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