



# Common Market Organisation (CMO) Fruit and vegetables sector

## Evolution of EU markets of certain F&V

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

*Civil Dialogue Group "Fruits & Vegetables" – 22 November 2017*

# Market context - Weather



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- ***Adverse weather:***
  - Cold spells April / May – Fruit, vineyards, open air cultivations
  - Heat & drought Southern EU – Irrigated crops
- Weather facilitated outbreaks of ***plant diseases***
- Damages ***limit production*** & prices increase

# Market context - Trade





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- ***Ongoing Russian ban***, difficult to replace Russian market
- ***New export markets*** - High-level missions to third countries:
  - America: Canada, Colombia, Mexico
  - Asia: China, Japan, Indonesia, Singapore, Vietnam
  - Recently: Saudi Arabia, Iran

# Market context - Trade

- **FTA agreements** negotiations:
  - America: CETA Canada, Mexico, Chili, Mercosur
  - Asia: Japan, Vietnam
  - Launch negotiations with Australia & New Zealand
- Efforts to remove **SPS barriers** in third countries
- More budget ***promotion third countries*** - EUR 111 million, 2017





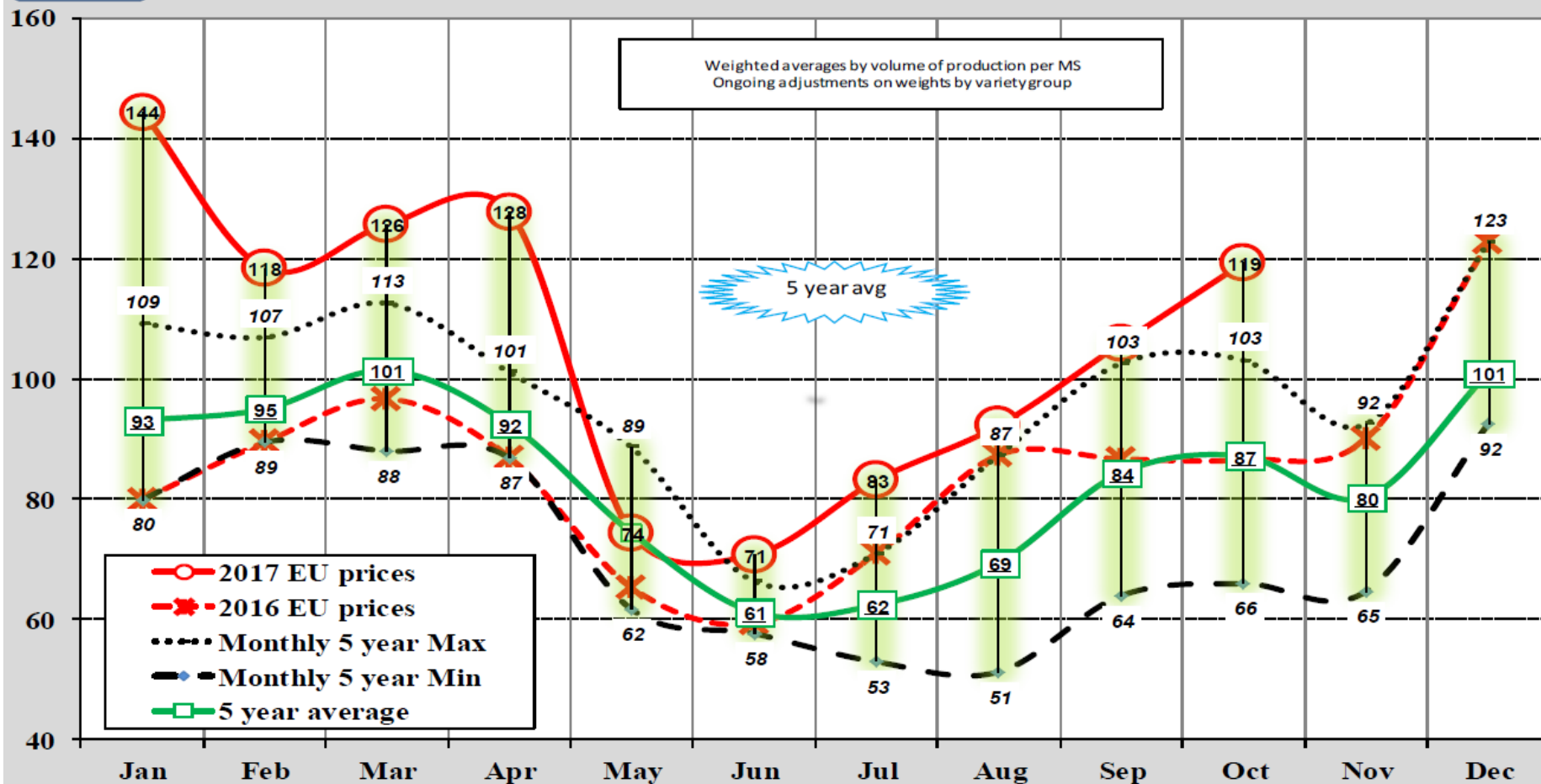
# Vegetables

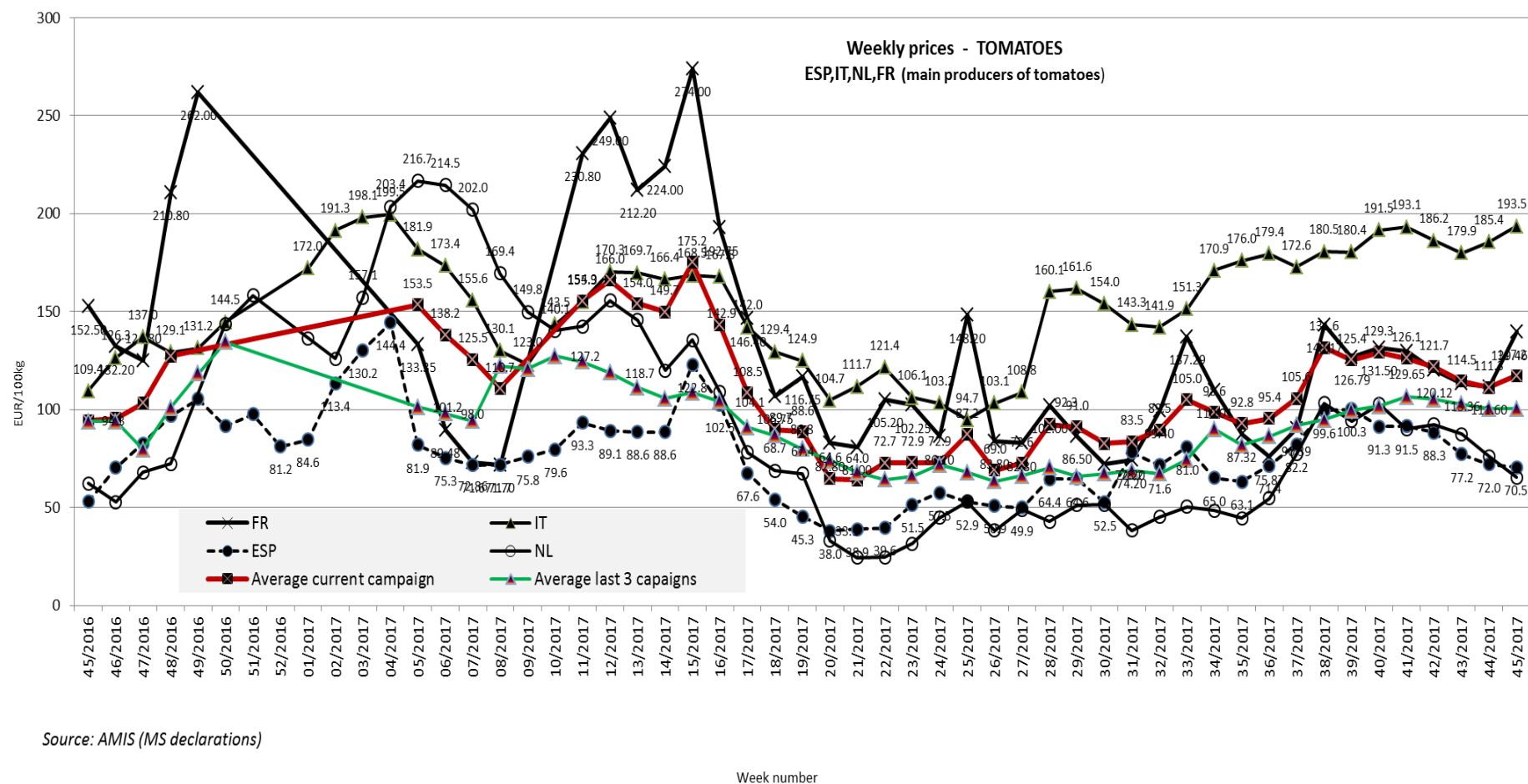


- Summer heat waves delayed plantations (ES, IT, MA)
- And prompted virus diseases (IT)
- Season started with good prices - ↓ production in October
- Production to reach normal levels from November
- And could concentrate in Jan-Feb (extension campaigns)

€/100 kg

## EUROPEAN UNION - Tomato prices, weighted avg (€/100 kg)

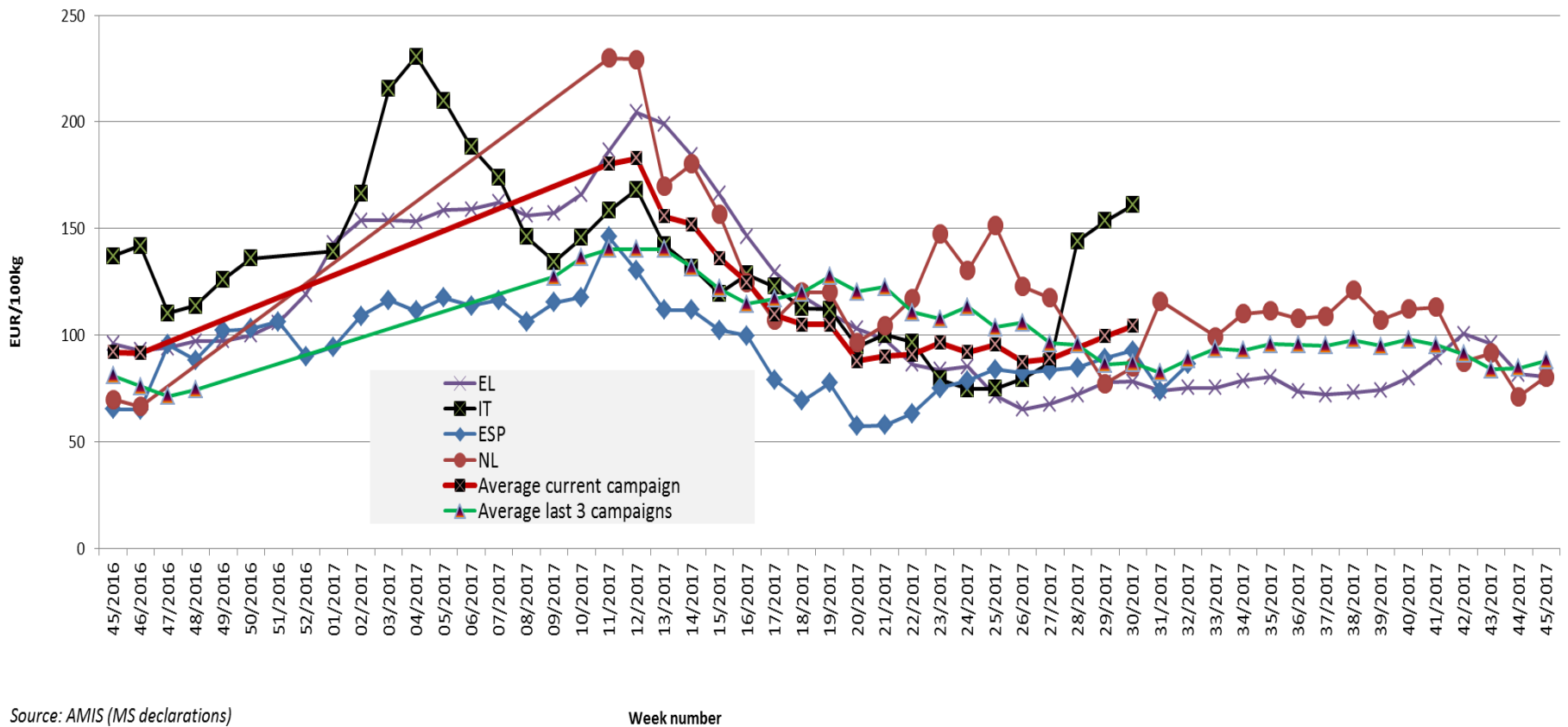




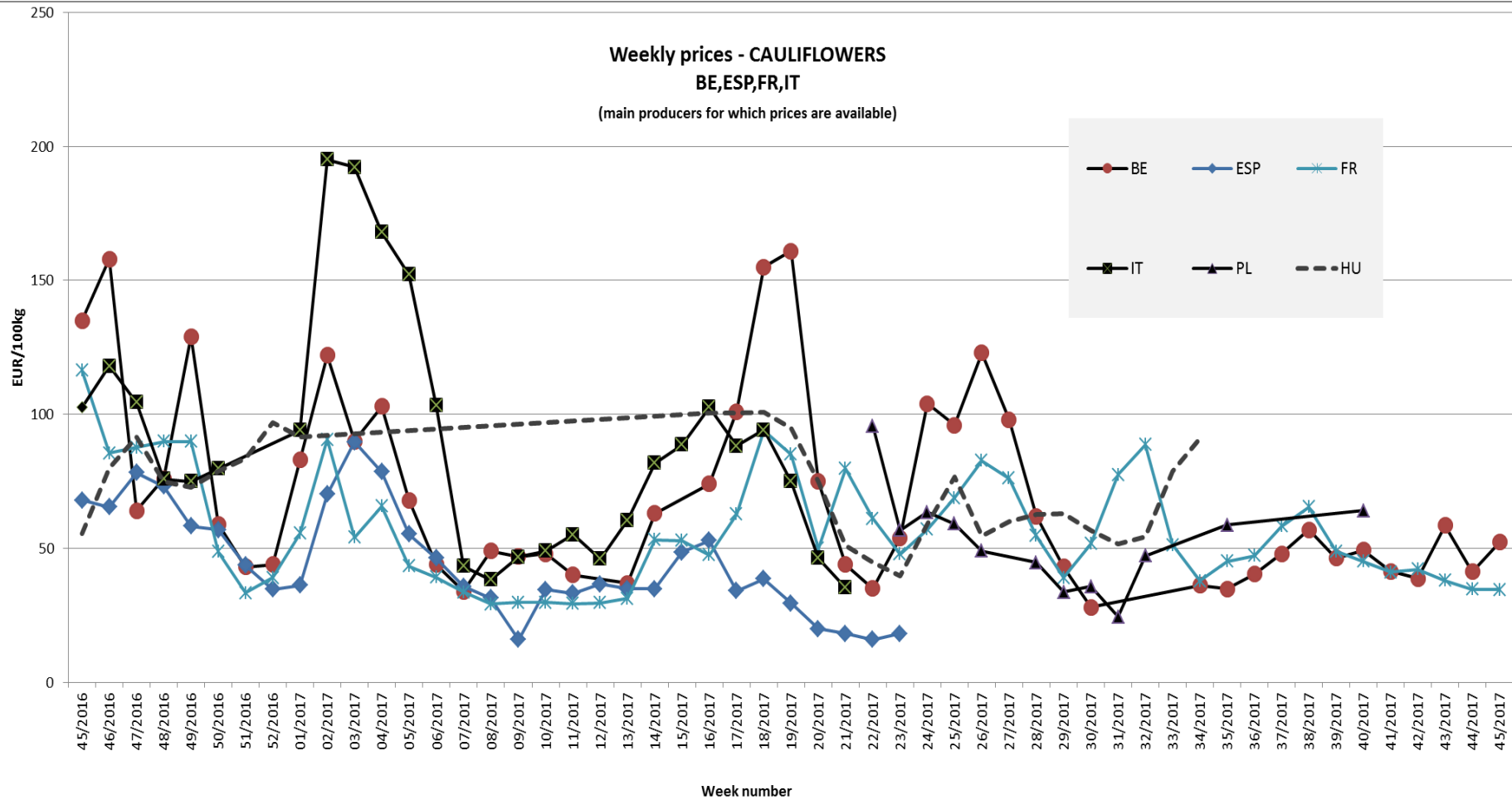
Source: AMIS (MS declarations)

### Weekly prices - PEPPERS

ESP,IT,NL,EL (main producers for which prices are available)



Source: AMIS (MS declarations)

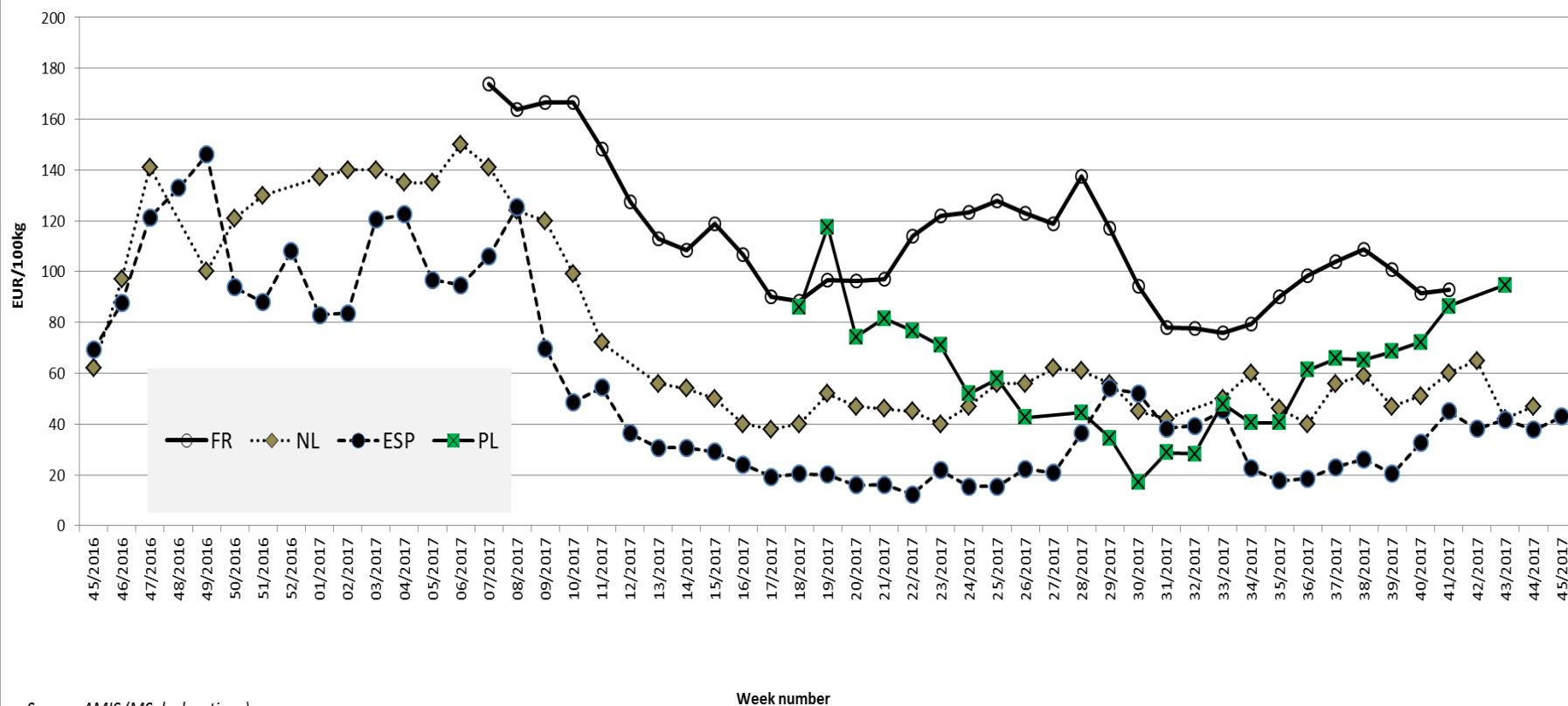


Source: AMIS (MS declarations)



### Weekly prices - CUCUMBERS

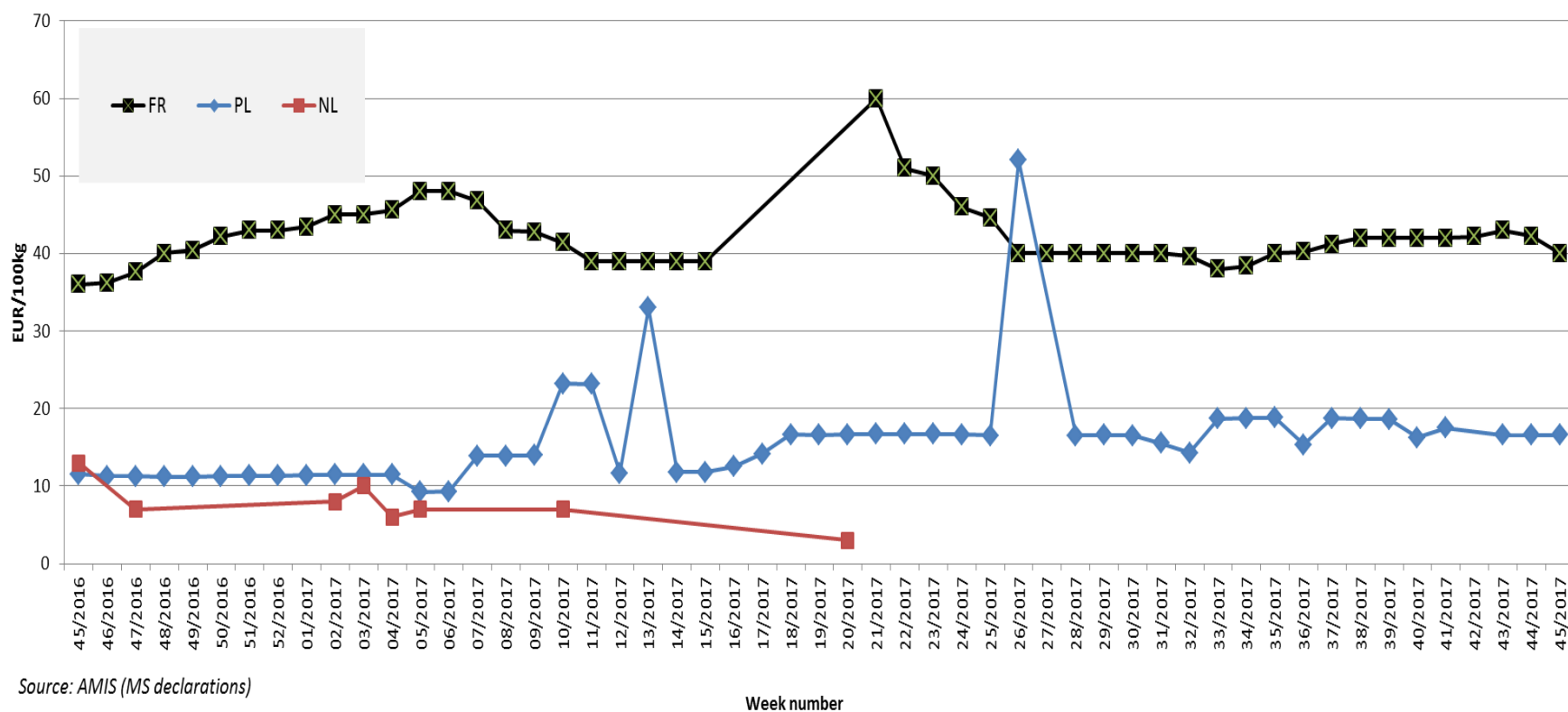
FR,ESP,NL,PL (main producers for which prices are available)



Source: AMIS (MS declarations)

## Weekly prices - CARROTS

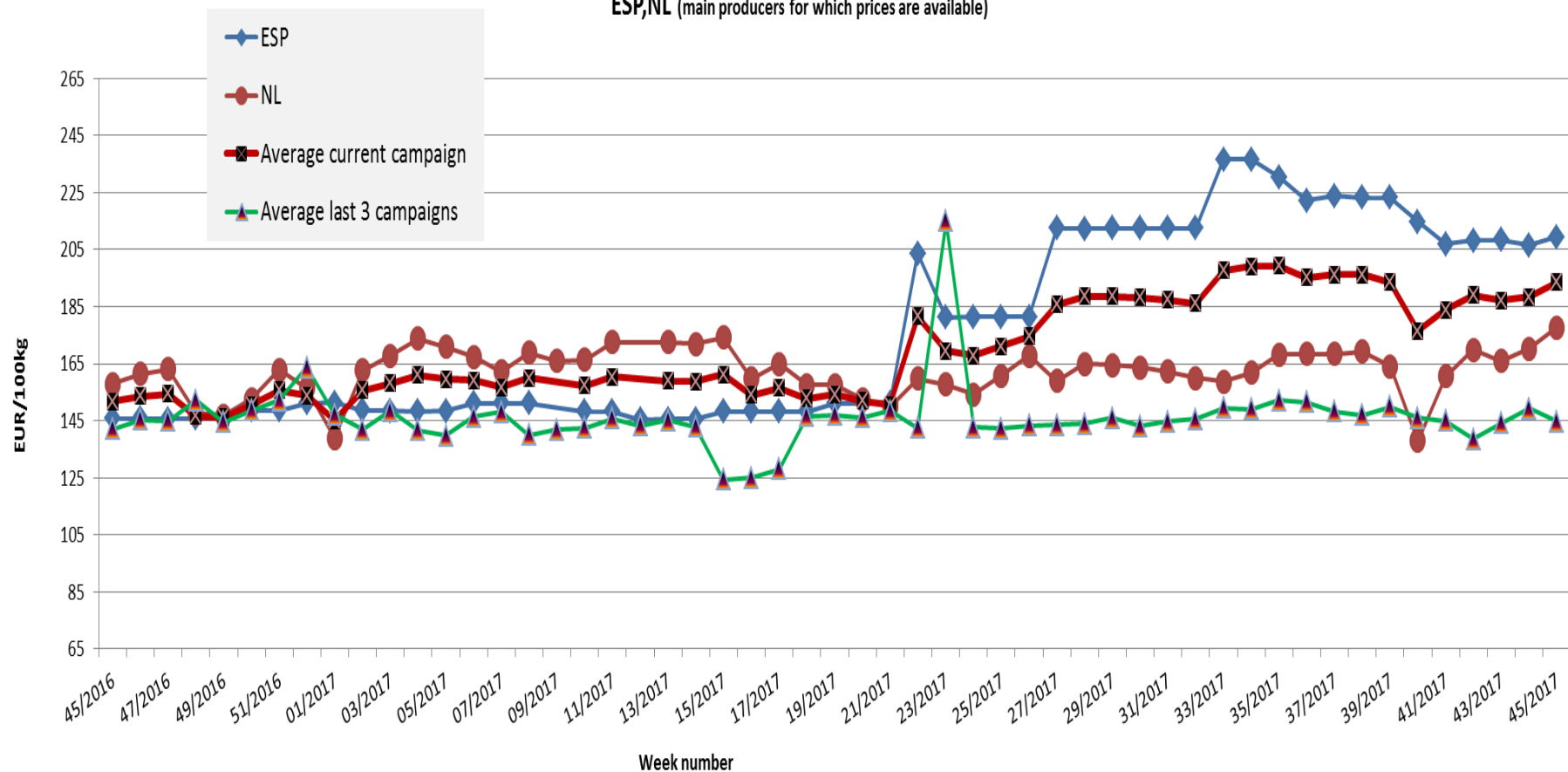
FR,PL,NL (main producers for which prices are available)



Source: AMIS (MS declarations)

## Weekly prices - CULTIVATED MUSHROOMS

ESP,NL (main producers for which prices are available)





# Fruits

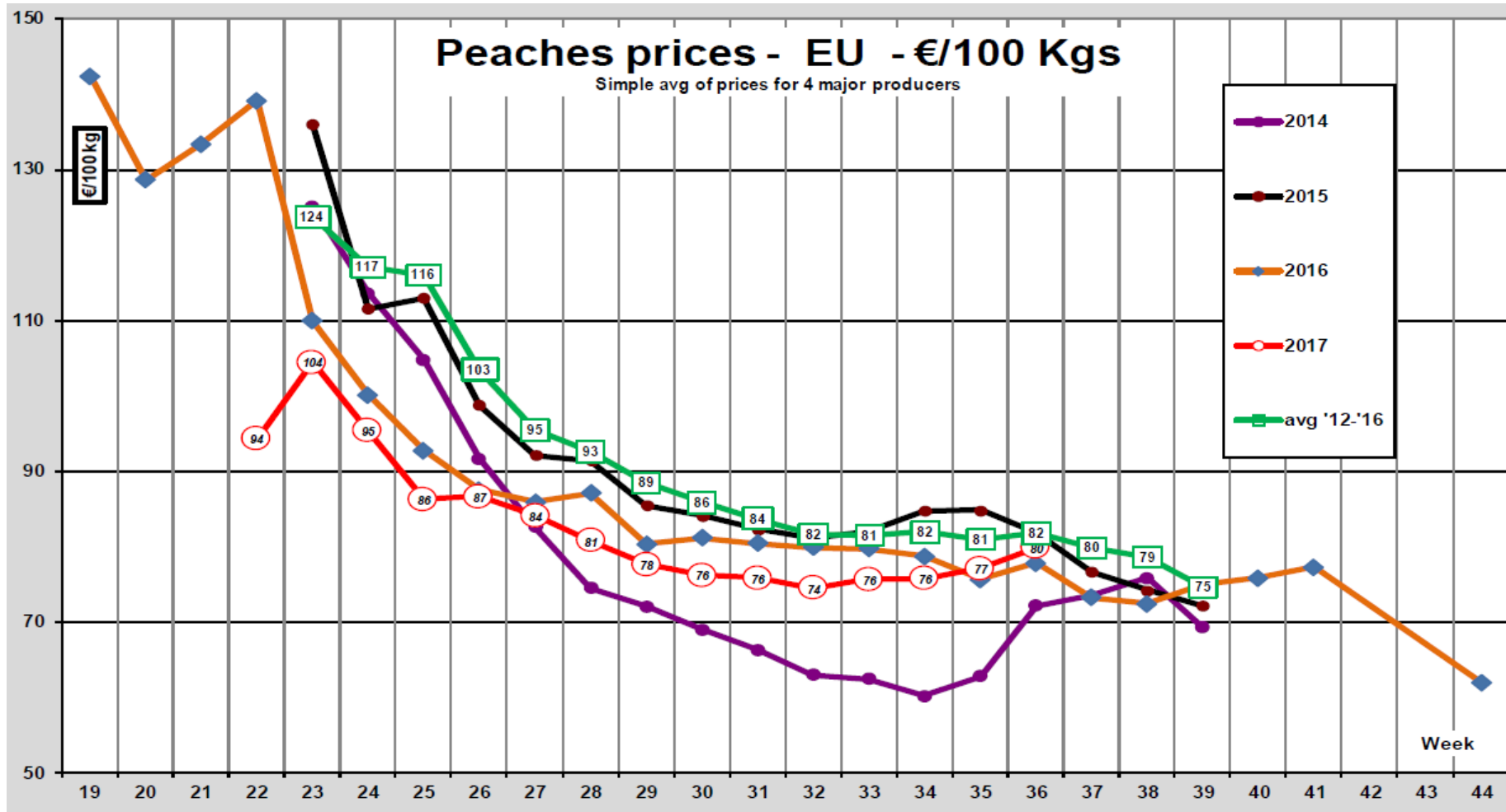


- Abundant crop, particularly in EL & ES
- Limited damages of spring frost
- Bad start of the season, ↓ prices along the season
- Prevalence small sizes in certain regions
- Some stability after emergency measures in August

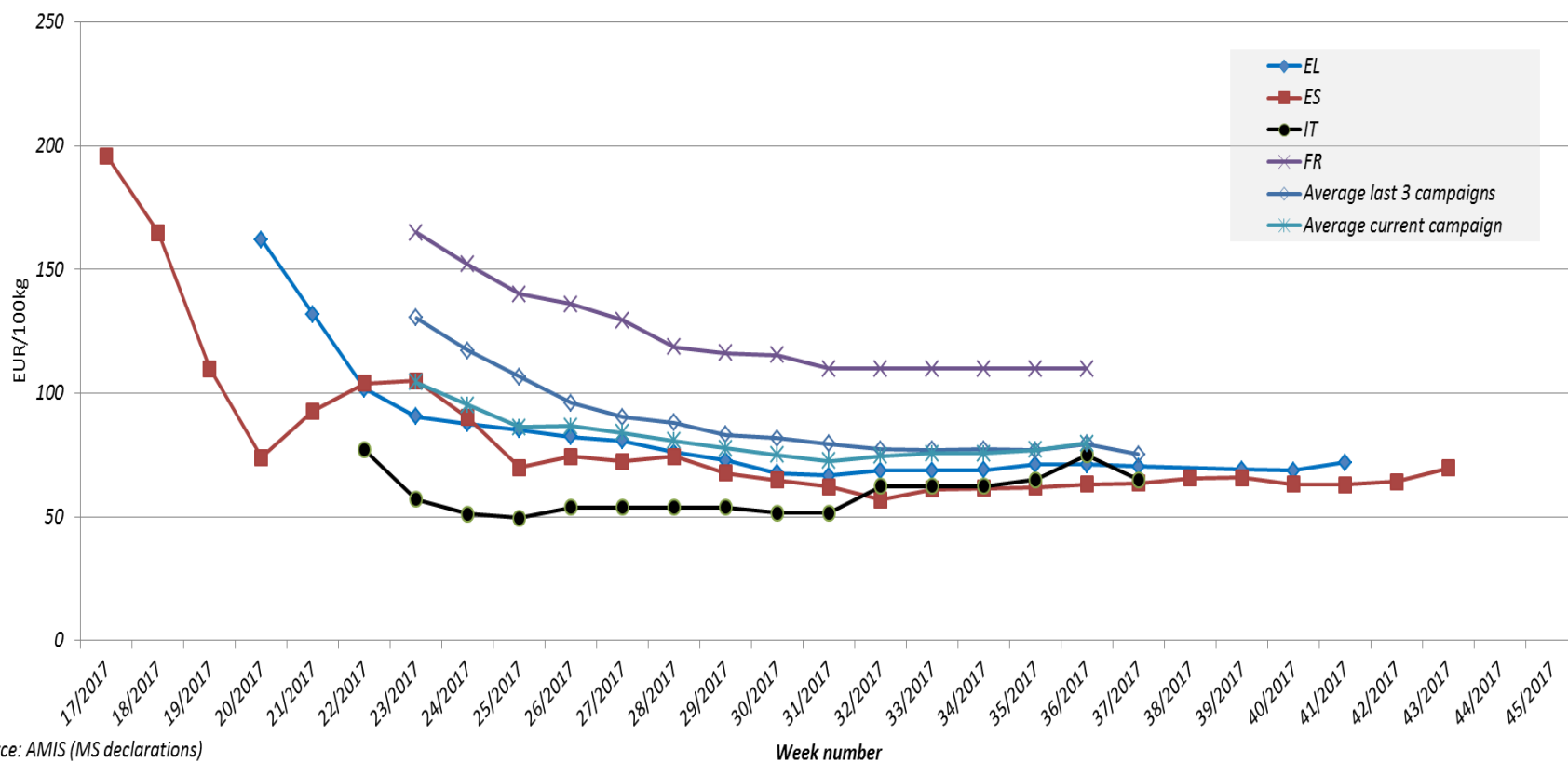


## Peaches prices - EU - €/100 Kgs

Simple avg of prices for 4 major producers



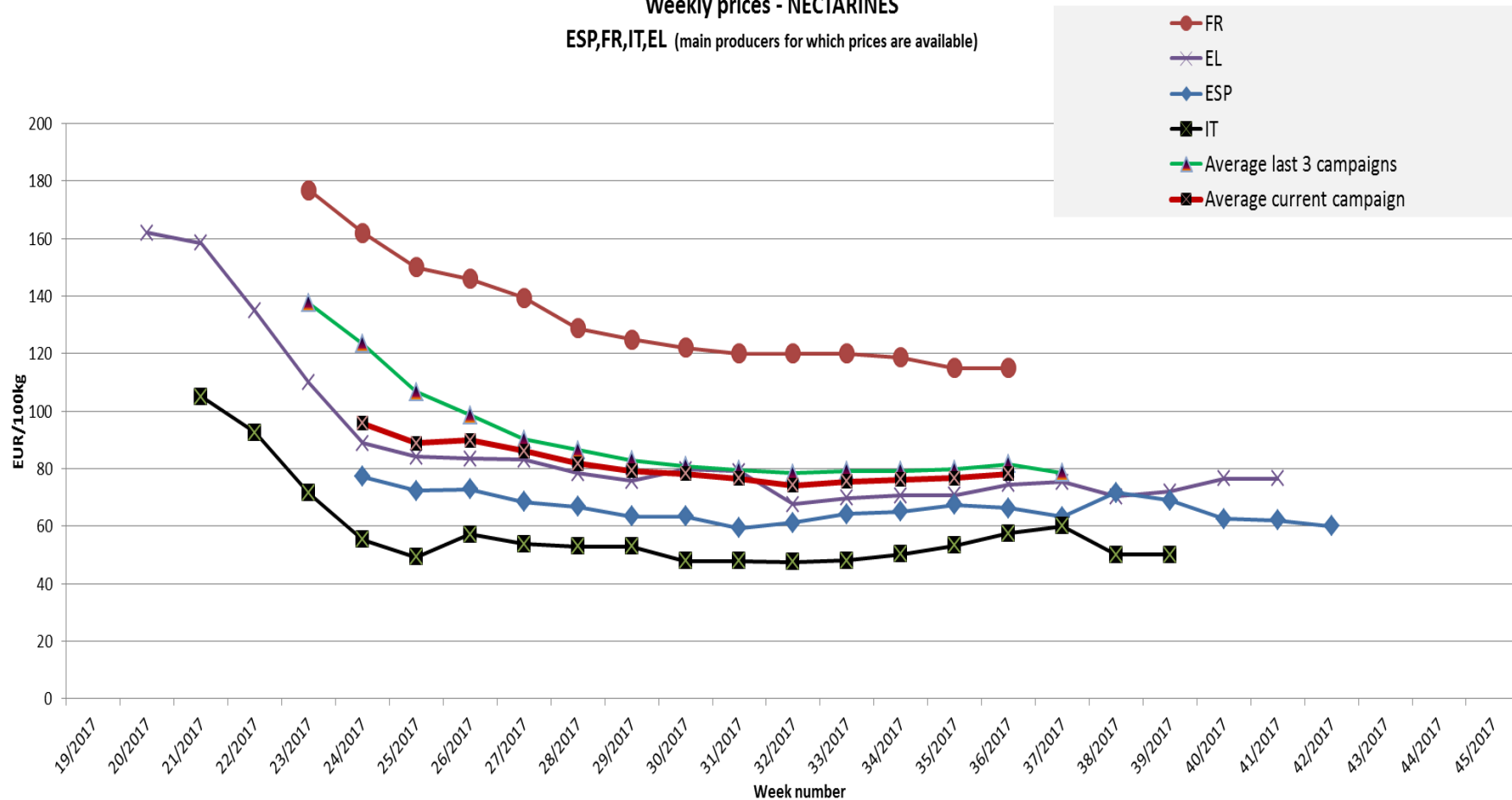
# Weekly prices - PEACHES EL, ES, IT, FR



Source: AMIS (MS declarations)

### Weekly prices - NECTARINES

ESP,FR,IT,EL (main producers for which prices are available)



# Fruits



- Strong impact spring frost: ↓↓ production apples, ≈ pears
- Possible impact on quality
- Dynamic development of new export destinations
- Steady price recovery in 17 (apples from May)



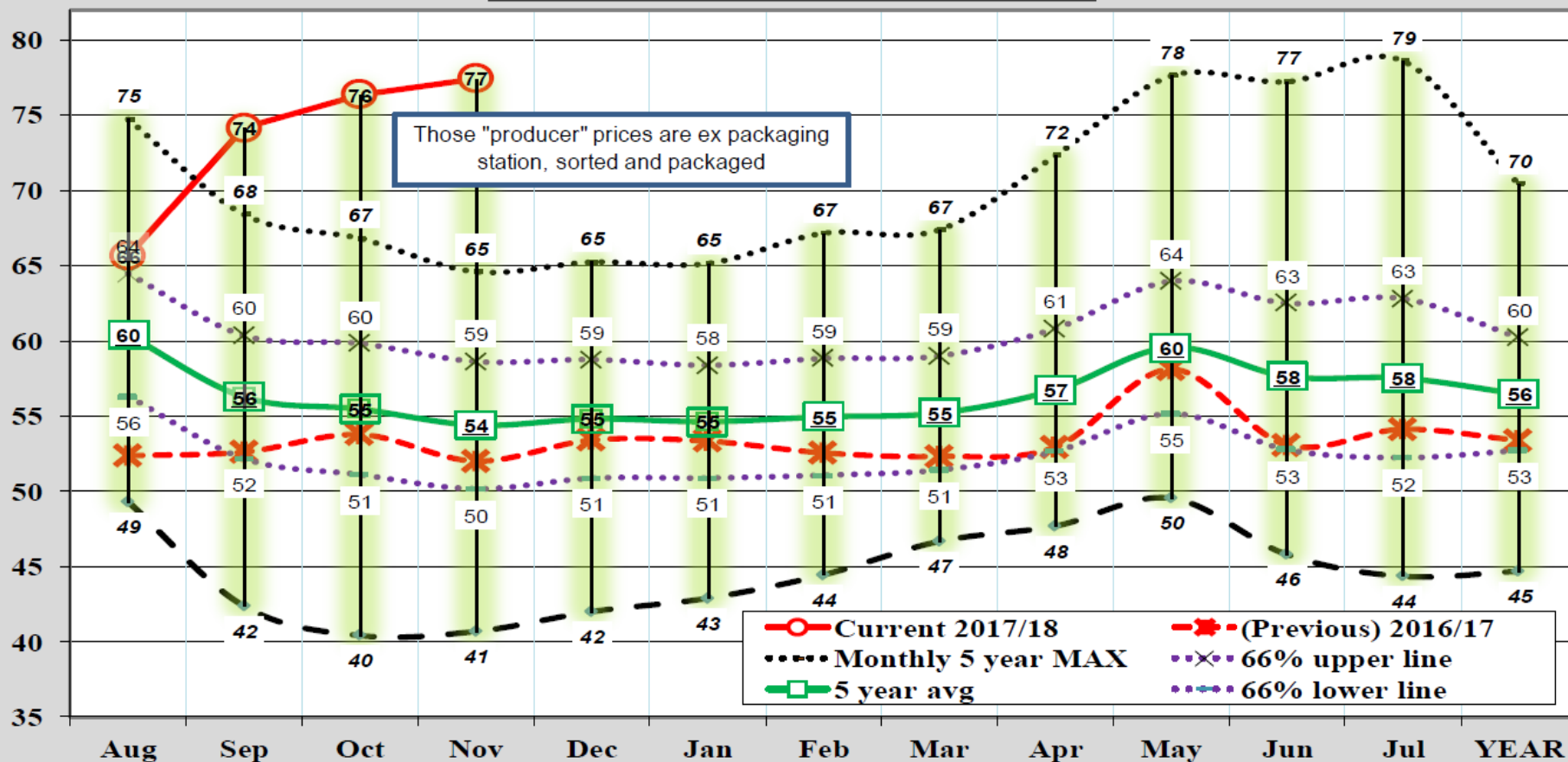
European  
Commission

European

€/100 kg

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

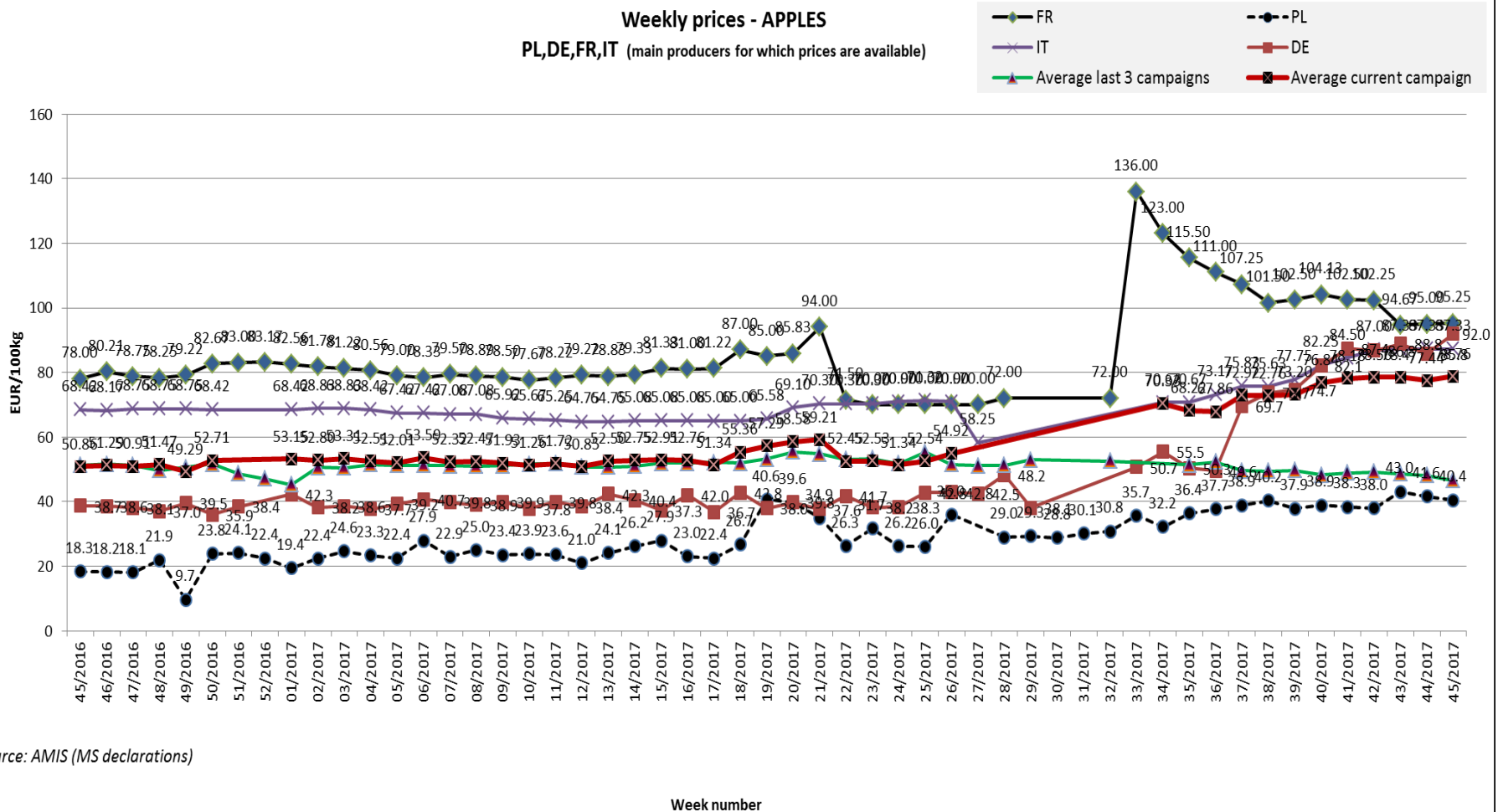
Simple avg of 4 MSs (the 4 major producers)



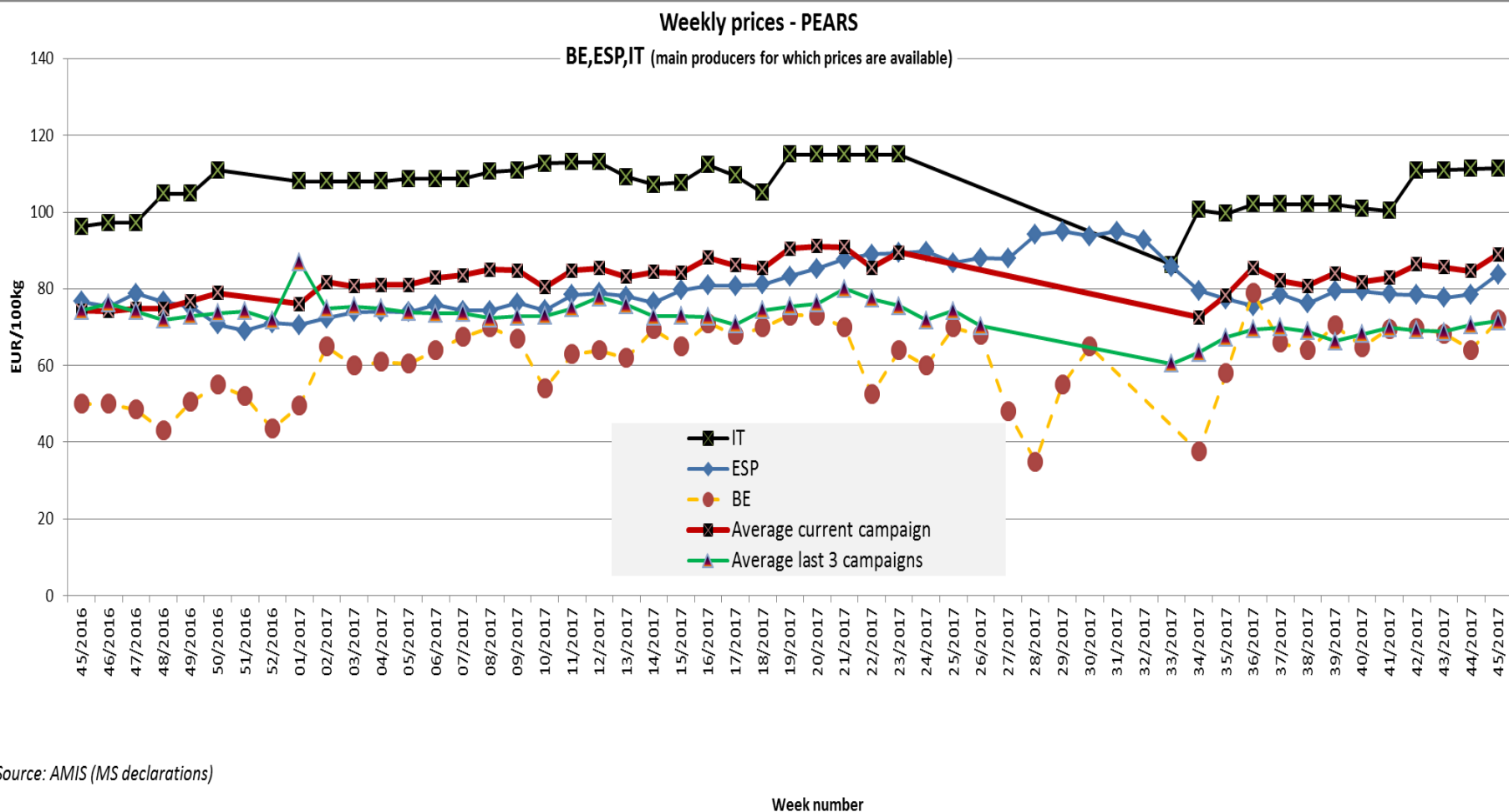


### Weekly prices - APPLES

PL,DE,FR,IT (main producers for which prices are available)



Source: AMIS (MS declarations)



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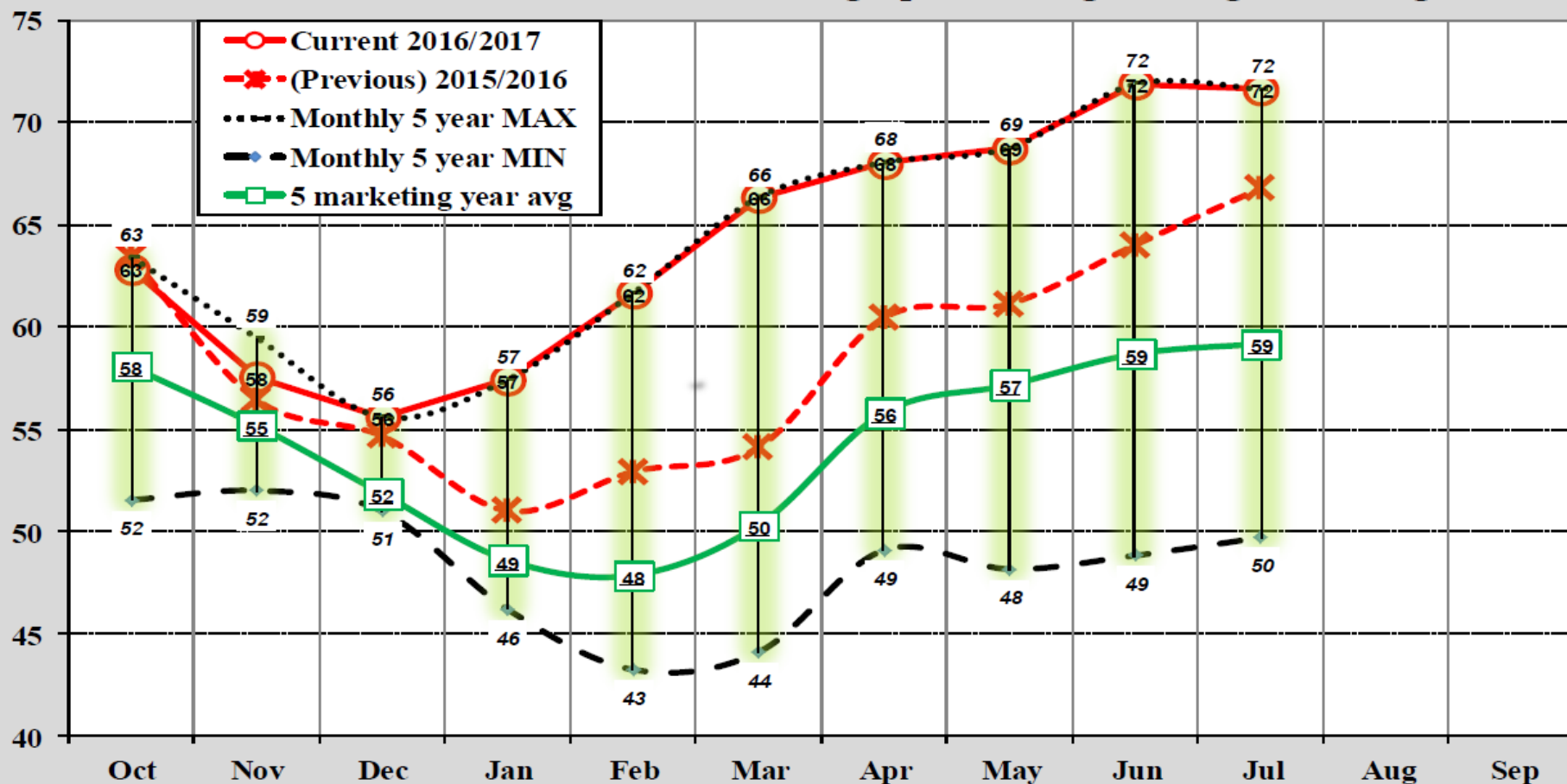
# Fruits

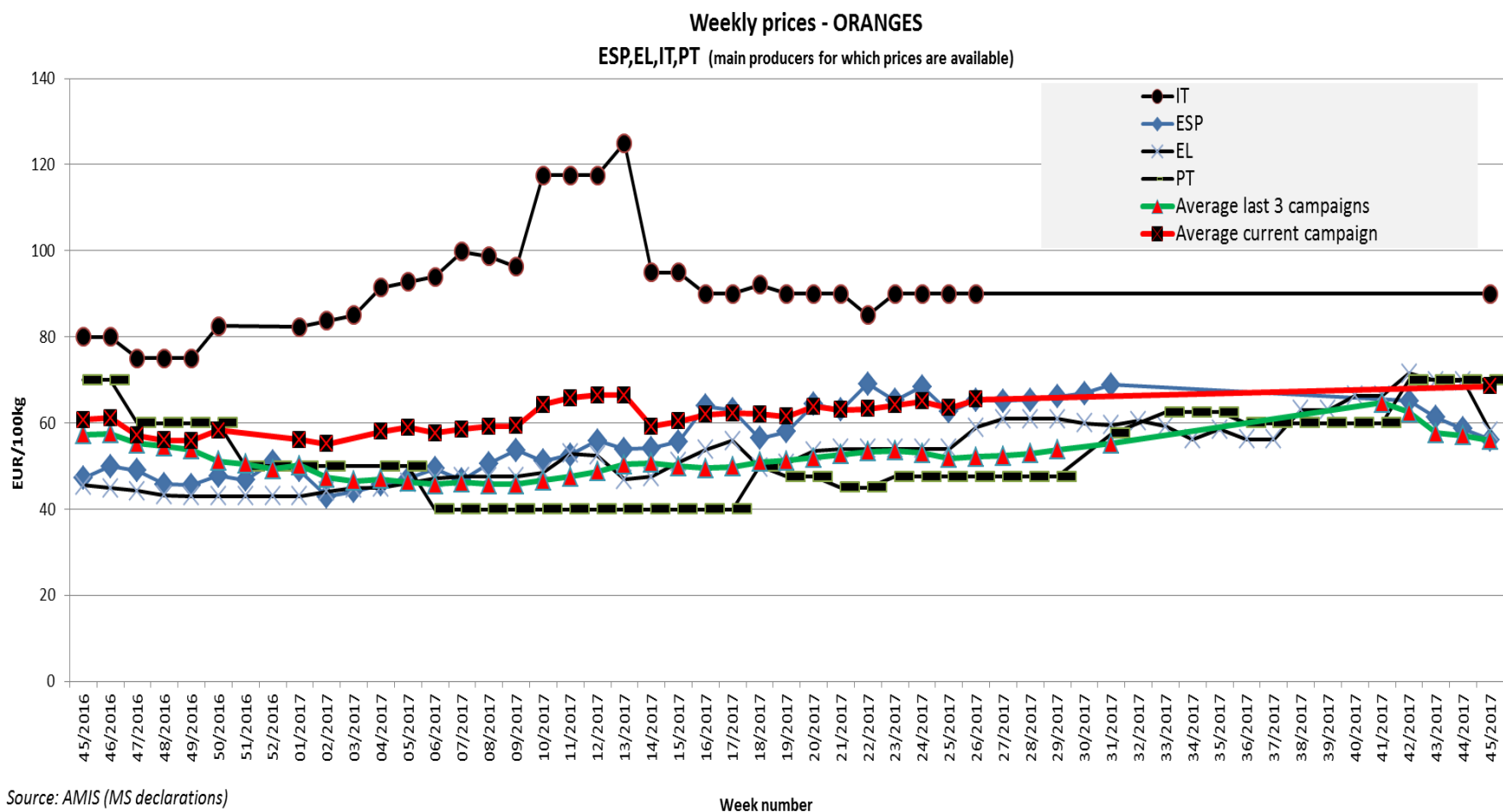


- ↓ production forecasted (ES, IT)
- Drought affected production, sizes, quality (juice)
- Outbreaks Tristeza virus (IT)
- Season started with good prices
- ↑ consumption: communication, innovation, new ways

€/100 kg

## EUROPEAN UNION - Orange prices, weighted avg (€/100kg)

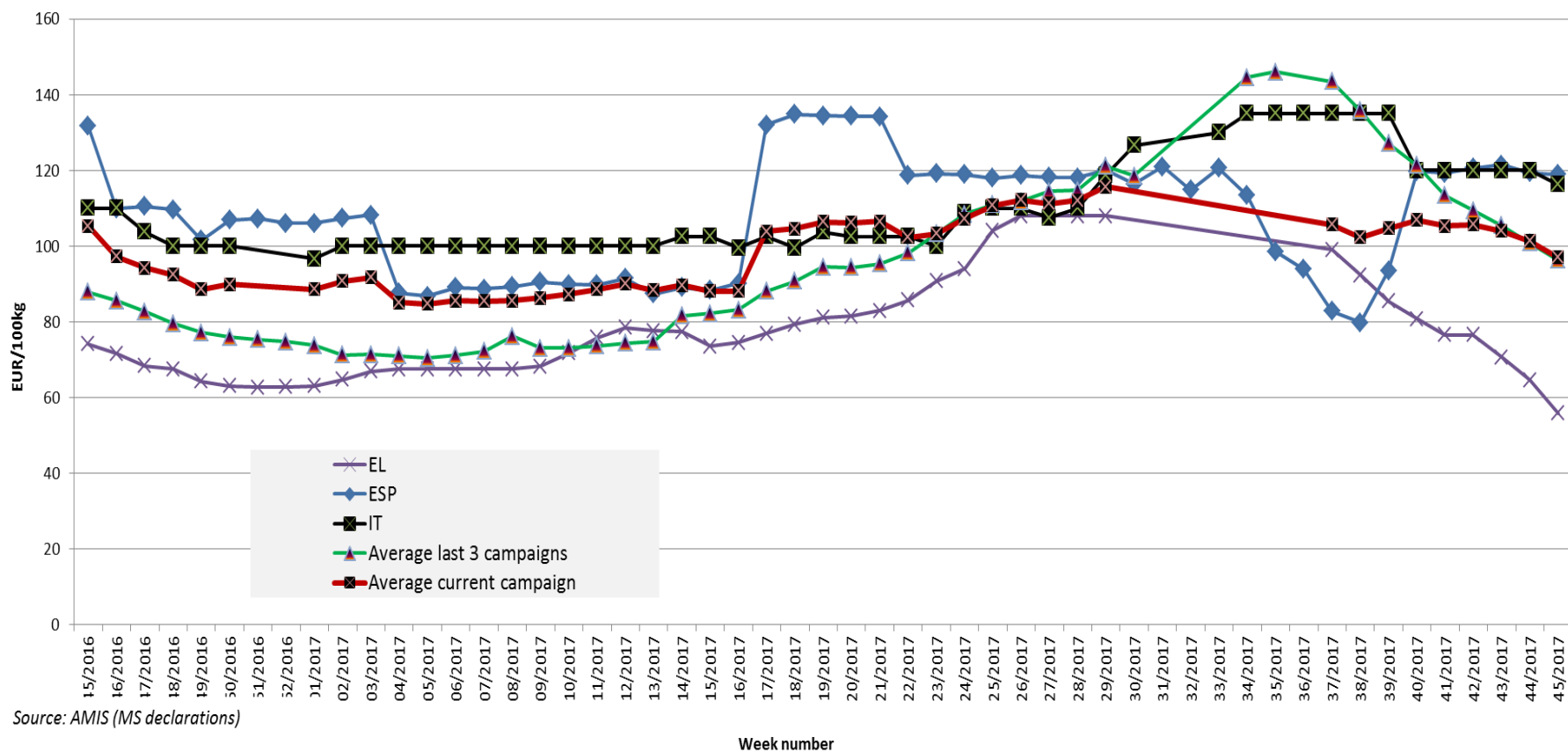






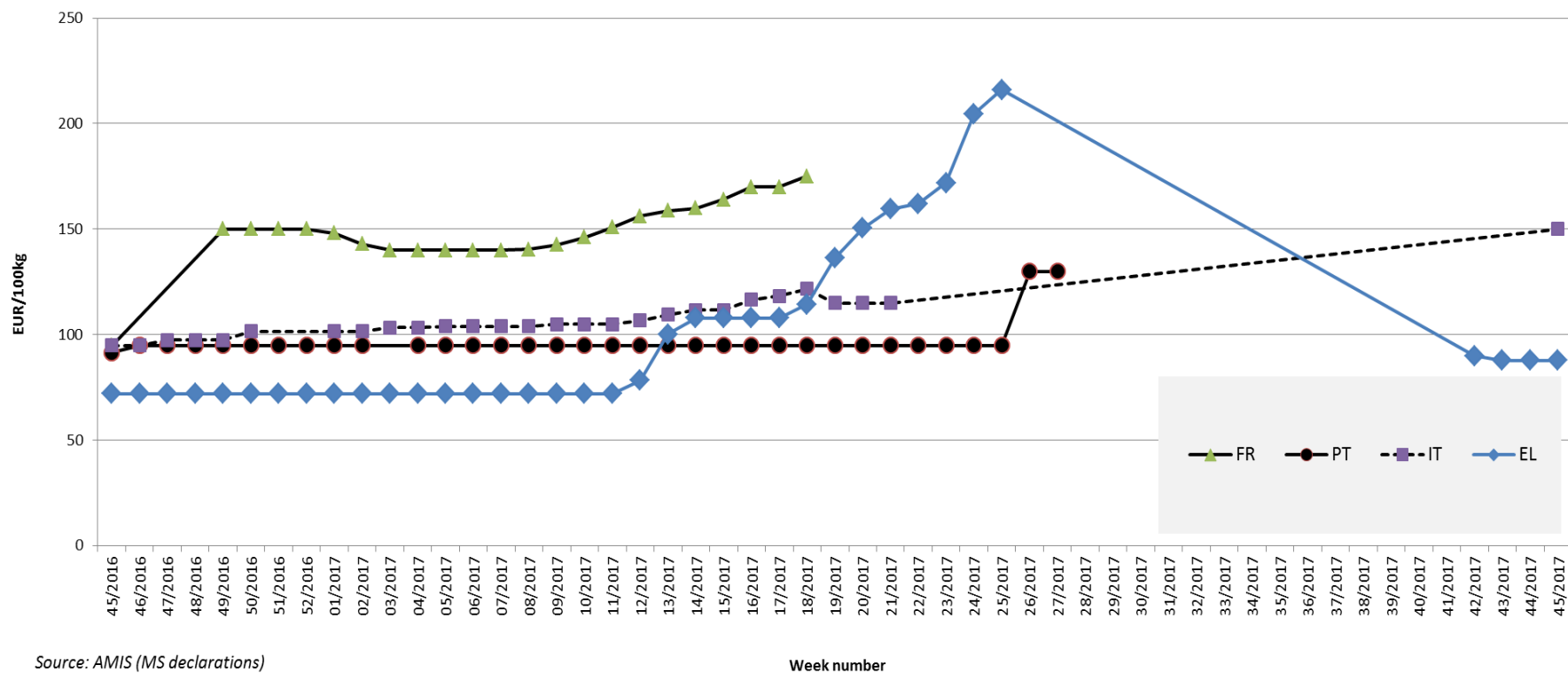
### Weekly prices - LEMONS

ESP,EL,IT (main producers for which prices are available)



Source: AMIS (MS declarations)

### Weekly prices - KIWIS EL,PT,FR,IT



Source: AMIS (MS declarations)

Week number



# Thank you for your attention!

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

*European Commission  
DG Agriculture and Rural Development  
Directorate G. Markets and Observatories*