

# APPLES AND PEARS MAY 2020 UPDATE

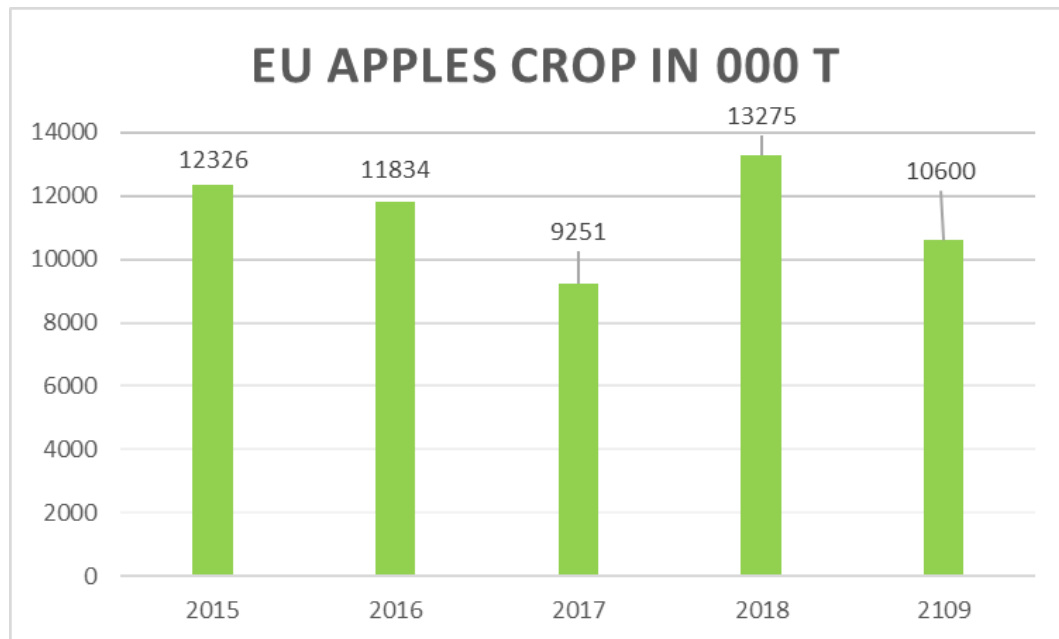


Market Observatory , 15 May 2020

- Northern Hemisphere apples and pears stocks and market developments under COVID
- Southern Hemisphere crop and trade outlook 2020
- Upcoming European apples and pears crops
- Challenges of the European apples and pears sector

# Northern Hemisphere apples and pears stocks and market developments

# NH APPLES CROP 2019



**CHINA: BACK TO 43 MIO T**  
**USA: CLOSE TO 5 MIO T**

											x 1000 tons	
Country	2010	2011	2012	2013	2014	2015	2016	2017	2018	F2019	(1)	(2)
Austria	169	199	157	155	188	177	40	67	184	140	-24	44
Belgium	288	305	220	220	318	285	234	88	231	259	12	41
Croatia	89	83	59	96	62	101	35	66	86	60	-30	-4
Czech Rep	103	79	118	121	131	156	139	102	145	102	-30	-21
Denmark	21	20	18	23	26	24	24	19	24	15	-38	-33
France	1.579	1.701	1.169	1.576	1.444	1.674	1.515	1.424	1.477	1.651	12	12
Germany	835	953	972	804	1.116	973	1.033	597	1.093	950	-13	5
Greece	254	305	242	236	245	242	259	231	301	275	-9	4
Hungary	488	301	750	585	920	522	498	530	782	452	-42	-25
Italy	2.179	2.293	1.939	2.122	2.456	2.280	2.272	1.704	2.264	2.093	-8	1
Latvia	12	8	9	15	10	8	10	8	14	11	-21	3
Lithuania	46	49	39	40	27	46	50	48	62	22	-65	-59
Netherlands	334	418	281	314	353	336	317	228	267	273	2	1
Poland	1.850	2.500	2.900	3.170	3.750	3.979	4.035	2.870	4.810	2.910	-40	-25
Portugal	251	265	221	284	272	329	263	314	267	307	15	9
Romania	423	412	351	387	382	336	327	230	425	319	-25	-3
Slovakia	32	33	36	42	46	40	17	15	44	36	-18	42
Slovenia	66	73	45	56	68	71	12	6	72	36	-50	20
Spain	486	507	391	464	505	482	495	480	476	542	14	12
Sweden	20	17	14	17	16	21	20	18	32	20	-38	-14
UK	214	226	162	204	206	243	239	207	219	206	-6	-7
<b>Total:</b>	<b>9.740</b>	<b>10.746</b>	<b>10.095</b>	<b>10.929</b>	<b>12.541</b>	<b>12.326</b>	<b>11.834</b>	<b>9.251</b>	<b>13.275</b>	<b>10.680</b>	<b>-20</b>	<b>-7</b>

(1) Percentage difference between F2019 and 2018

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

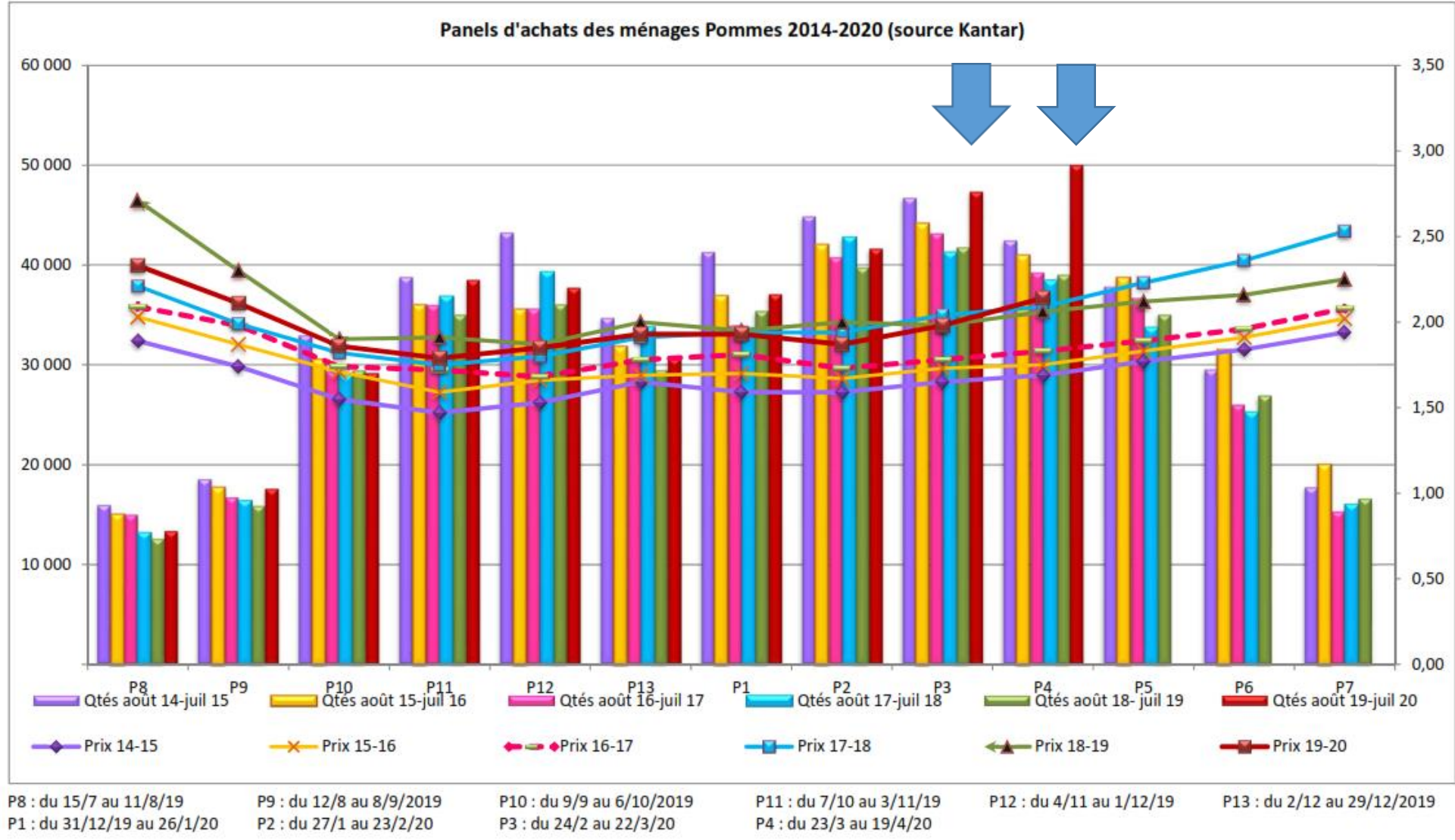
# European apples stocks – 1<sup>st</sup> May

Apple Stocks (Ton)	%2020/2019	Moved 2020	Moved 2019	5/1/2020	5/1/2019	5/1/2018	5/1/2017	5/1/2016
Austria (Steiermark)	-28.7%	-2,046	-12,801	43,068	60,383	19,309	11,133	58,318
Belgium	10.7%	-14,748	-17,737	61,460	55,531	5,106	32,190	60,375
Czech Republic	-55.3%	-4,903	-9,062	7,904	17,678	7,477	6,992	13,663
Denmark	-100.0%	-624	-1,335	0	3,116	0	2,047	2,124
France	16.8%	-100,903	-108,071	229,966	196,938	154,807	195,927	187,383
Germany	-47.1%	-50,507	-54,988	70,907	133,973	45,265	126,892	111,865
Italy	-29.7%	-204,335	-191,119	352,379	501,276	185,843	470,610	465,821
Poland	-59.8%	-166,000	-260,000	163,000	405,000	177,000	300,000	325,000
Portugal		0	0	0				
Spain (Catalonia)	27.7%	-42,956	-29,907	104,314	81,707	57,288	95,292	62,236
Switzerland	-30.5%	-9,156	-9,290	19,424	27,954	7,472	22,706	21,177
The Netherlands	12.4%	-22,793	-19,431	66,450	59,140	37,319	83,512	76,773
United Kingdom**	-7.3%	-12,431	-19,840	19,804	21,353	13,773	0	13,850
<b>TOTAL</b>	<b>-27.2%</b>	<b>-631,402</b>	<b>-733,581</b>	<b>1,138,676</b>	<b>1,564,048</b>	<b>710,659</b>	<b>1,347,302</b>	<b>1,398,585</b>

# European apples stocks per varieties 1<sup>st</sup> May

Variety (Ton)	%2020/2019	Moved 2020	Moved 2019	5/1/2020	5/1/2019	5/1/2018	5/1/2017	5/1/2016
Annurca		0	0	0	0	0	0	0
Boskoop	-98.7%	-1,672	-3,111	41	3,098	132	1,622	1,317
Braeburn	-30.7%	-25,635	-30,044	36,962	53,374	10,438	31,678	30,804
Bramley	-42.1%	-4,593	-7,550	7,087	12,250	11,000	0	9,000
Cameo	-57.2%	-480	-1,043	116	271	0	0	850
Cortland		0	0	0	0	0	0	0
Cox Orange	-100.0%	-128	-301	0	15	0	1	32
Cripps Pink	-13.7%	-34,239	-36,878	24,696	28,629	18,453	33,573	24,115
Elstar	63.7%	-21,564	-20,235	32,275	19,720	8,349	26,724	25,745
Fuji	-35.3%	-32,935	-28,571	38,276	59,136	26,161	38,219	52,313
Gala	0.1%	-48,410	-63,630	50,614	50,570	20,546	24,216	27,909
Gloster	-14.0%	-18,106	-15,453	22,000	25,584	25,218	25,217	25,566
Golden Delicious	-9.5%	-171,322	-143,622	475,752	525,959	298,748	573,676	543,636
Granny Smith	-15.8%	-21,539	-25,727	49,295	58,553	55,263	43,548	64,073
Holsteiner Cox		0	-35	0	0	0	0	0
Idared	-56.1%	-32,532	-83,794	57,031	129,846	68,377	114,048	140,207
Jonagold	-25.2%	-22,126	-28,104	82,117	109,797	41,982	110,138	131,567
Jonagored	-26.7%	-6,593	-12,062	35,958	49,058	8,279	42,652	45,672
Jonathan		0	0	0	0	0	0	0
Lobo		0	0	0	0	0	0	0
Morgendurf/imperat	-49.3%	-1,946	-1,213	3,247	6,402	928	5,638	6,947
Pinova	-27.2%	-12,142	-12,493	15,416	21,176	1,611	5,184	6,857
Red Delicious	-16.2%	-29,617	-33,420	43,080	51,418	27,356	51,817	47,091
Red Jonaprince	-20.1%	-28,668	-13,069	46,978	58,779	20,649	37,015	22,485
Reinette	-68.1%	-7,434	-6,210	3,480	10,917	785	7,341	7,526
Shampion	-78.7%	-25,181	-55,347	15,004	70,377	15,048	25,100	30,569
Stayman	-100.0%	0	-7	0	400	246	2,989	4,466
Spartan		0	-12	0	0	0	0	0
Other new varieties*	-25.9%	-23,793	-22,354	37,038	49,962	12,995	37,788	33,304
Other	-63.1%	-60,747	-89,296	62,214	168,757	38,095	109,117	116,533
<b>Total</b>	<b>-27.2%</b>	<b>-631,402</b>	<b>-733,581</b>	<b>1,138,676</b>	<b>1,564,048</b>	<b>710,659</b>	<b>1,347,302</b>	<b>1,398,585</b>





# European pears stocks – 1<sup>st</sup> May

Pear Stocks (Ton)	%2020/2019	Moved 2020	Moved 2019	5/1/2020	5/1/2019	5/10/2018	5/1/2017	5/1/2016
Belgium	-63.5%	-43,908	-31,965	14,292	39,132	12,520	24,929	48,359
Czech Republic	-73.5%	-522	-377	200	756	600	370	1,001
Denmark		-19	-121	0	0	0	0	17
France	-27.2%	-435	-1,140	545	749	775	464	275
Germany	-44.3%	-169	-417	225	404	0	25	20
Italy	-100.0%	0	-33,457	0	15,977	26,736	6,879	22,150
Poland		0	0	0	0	0	0	0
Portugal*	-5.3%	-34,817	-28,598	12,058	12,737	5,745	4,397	2,891
Spain (Catalonia)	-7.0%	-12,443	-9,175	16,023	17,223	19,559	11,861	19,056
Switzerland	26.6%	-1,603	-1,338	856	676	0	3	33
The Netherlands	-14.0%	-31,665	-38,312	59,636	69,315	61,291	69,781	62,952
United Kingdom**	-100.0%	-50	-705	0	46	0	0	750
<b>TOTAL</b>	<b>-33.9%</b>	<b>-78,756</b>	<b>-129,140</b>	<b>103,835</b>	<b>157,015</b>	<b>127,226</b>	<b>118,709</b>	<b>157,504</b>



# European pears stocks per varieties 1<sup>st</sup> May

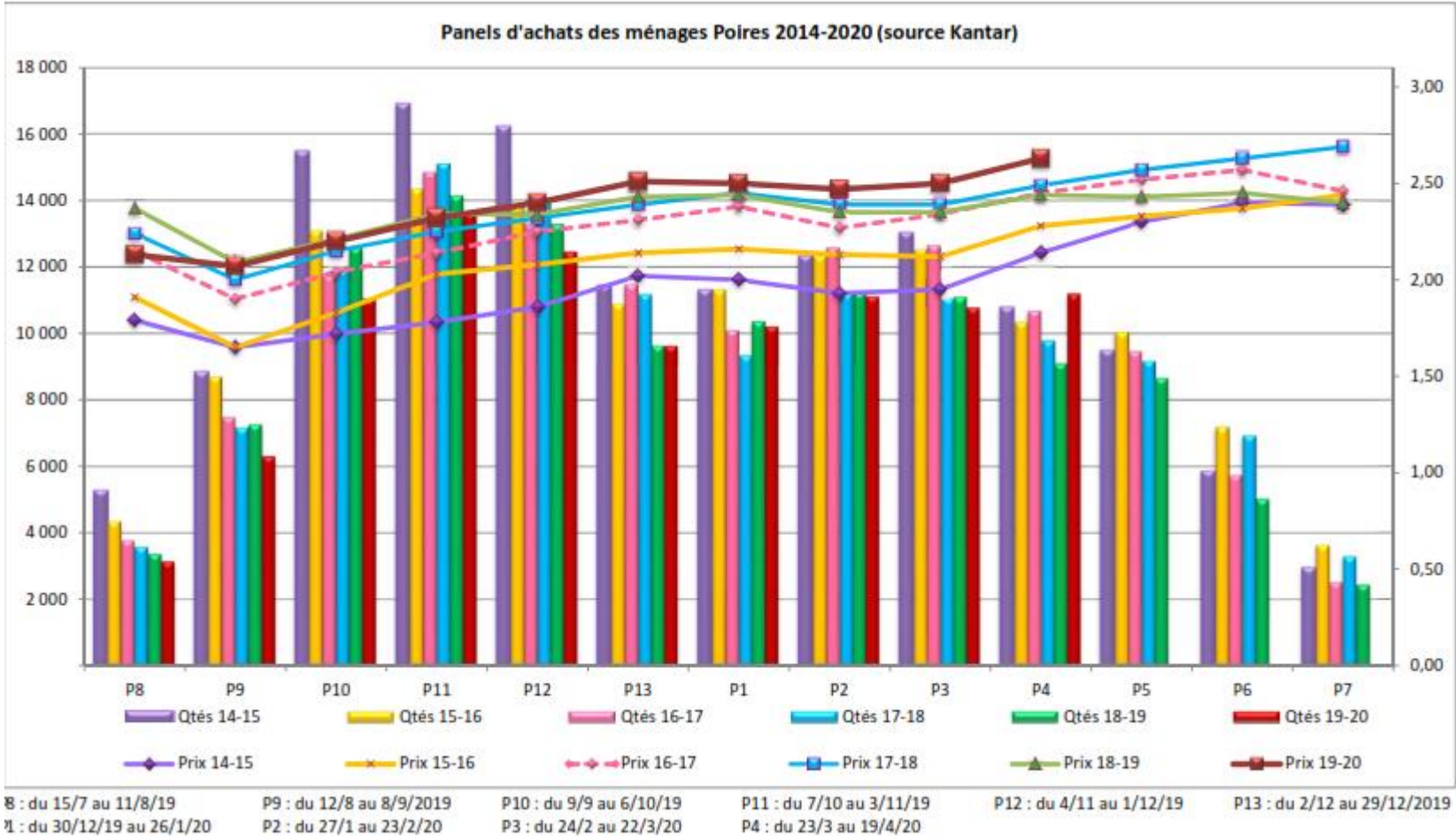
Variety (Ton)	%2020/2019	Moved 2020	Moved 2019	5/1/2020	5/1/2019	5/1/2018	5/1/2017	5/1/2016
Abate Fetel	-100.0%	0	-21,223	0	5,607	14,445	3,806	4,734
Alexandrina	32.6%	-483	-324	382	288	440	424	139
Blanquilla	-62.2%	-423	-1,294	136	359	1,580	163	525
Conference	-33.8%	-86,354	-83,091	88,357	133,534	101,914	108,704	147,137
Doyenne du comice	-92.8%	-20	-1,163	22	304	111	47	95
Kaiser	-100.0%	0	-2,988	0	810	2,259	531	1,411
Rocha	-5.3%	-34,817	-28,598	12,058	12,737	5,745	4,397	2,891
Other	-14.7%	-3,534	-6,924	2,881	3,376	732	637	573
<b>Total</b>	<b>-33.9%</b>	<b>-78,756</b>	<b>-129,140</b>	<b>103,835</b>	<b>157,015</b>	<b>127,226</b>	<b>118,709</b>	<b>157,504</b>

# USA apples stocks 1<sup>st</sup> May

Apple Stocks (Ton)	%2020/2019	Moved 2020	Moved 2019	5/1/2020	5/1/2019	5/1/2018	5/1/2017	5/1/2016
Braeburn	38.4%	-914	-2,229	2,611	1,887	1,544	2,249	305
Cortland	-30.6%	-305	-1,543	648	934	858	476	896
Cosmic Crisp		0	0	0				
Empire	-14.7%	0	-7,755	4,211	4,936	5,088	3,144	2,477
Fuji	30.2%	-29,880	-29,309	116,853	89,755	106,925	78,150	58,083
Gala	27.1%	-53,033	-43,829	182,064	143,265	148,963	124,094	80,570
Golden Delicious	122.5%	-11,949	-12,558	70,889	31,862	56,006	45,983	60,313
Granny Smith	37.9%	-25,478	-21,477	127,620	92,537	159,329	62,886	115,614
Honeycrisp	19.3%	-24,888	-19,609	60,789	50,937	46,593	16,274	20,638
Idared	535.2%	-114	-648	1,334	210	1,048	1,753	896
Jonagold	-100.0%	0	-2,572		2,268	3,506	4,173	1,639
Jonathan	-56.9%	-1,353	-724	419	972	0	172	210
McIntosh	-11.7%	-3,678	-6,707	6,765	7,661	7,375	5,240	8,270
Mutsu/Crispin	-38.1%	-115	-191	495	800	1,372	915	419
Newtown Pippin	-14.2%	-57	-57	229	267	0	0	0
Northern Spy		0	0			0	0	0
Pink Lady	6.2%	-10,805	-14,178	45,259	42,610	36,436	44,401	30,071
Red Delicious	-6.3%	-47,755	-59,150	212,649	226,846	228,828	307,778	219,414
Rome	5.2%	-95	-933	2,706	2,573	2,839	3,506	2,496
Rome Sport	176.3%	-362	-191	210	76	324	343	610
Spartan	-84.2%	-305	-114	305	1,925	1,753	648	1,982
Stayman	-70.2%	-19	-19	57	191	133	76	191
Winesap		0	0			0	0	0
York	-53.5%	-19	-76	133	286	0	38	38
Others	68.6%	-17,112	-16,179	54,844	32,529	32,224	34,416	31,348
<b>TOTAL</b>	<b>21.2%</b>	<b>-228,236</b>	<b>-240,048</b>	<b>891,090</b>	<b>735,327</b>	<b>841,144</b>	<b>736,715</b>	<b>636,480</b>

# USA pears stocks 1<sup>st</sup> May

Pear Stocks (Ton)	%2020/2019	Moved 2020	Moved 2019	5/1/2020	5/1/2019	5/1/2018	5/1/2017	5/1/2016
Anjou	6.9%	-14,277	-18,407	39,389	36,848	28,982	31,410	22,946
Bosc	-76.1%	-2,404	-6,068	960	4,018	32	2,668	1,994
Red Anjou	20.8%	-1,400	-1,791	4,389	3,633	2,153	3,287	490
Comice		-30	-6	0	0	0	2	0
Concorde		0	-4	0	0	0	0	0
Seckel		-17	-1	0	0	0	0	0
Forelle		0	-2	0	0	0	2	
Other Reds		0	0	0	0	0	0	0
Other Winter Varities	#DIV/0!	0	-13	0	0	0	1	28
Northwest Bartletts (Williams)	#DIV/0!	0	0	0	0	0	0	0
<b>TOTAL</b>	<b>0.5%</b>	<b>-18,128</b>	<b>-26,292</b>	<b>44,738</b>	<b>44,499</b>	<b>31,167</b>	<b>37,370</b>	<b>25,458</b>



# General trends apples and pears

- Prices:
  - Overall good to the turn of the year and very good to excellent towards spring 2020 and COVID -19 pandemic
  - Higher prices in most of countries for growers and also at retail level , in particular since March
  - Partially paying off lower price last year
  - France and Spain lower prices though than past year.
- Demand
  - Good demand ,leading to lowering stocks across the EU to minimal level
  - Early end of season expected
  - Raising demand for local products
  - More prepack order since COVID
  - Higher consumption through retail sales

# Upcoming European apples and pears crops



# Upcoming season

- Still early to predict, but first indication lead to a medium - low crop for both apples and pears
- Several late frost episodes with damages a/o in HU, AT, PL, IT, ...
- Lack of rains in winter and spring, some rains now alleviating drought, some damages with heavy rain in South West FR, hails in NL,..
- Flowerings issues in some countries with impact on some varieties like golden
- Currently , several countries indicate crop 10-15% lower compared to average crop – but lot could still happen before end of July
- Prognosfruit

# Southern Hemisphere apples & pears crop and trade outlook 2020

# CONSOLIDATED SH PRODUCTION FORECAST BY COUNTRY

## Apples

*x 1000 tons*

<i>Country</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>F2020</i>	<i>(1)</i>	<i>(2)</i>
<b>Argentina</b>	920	840	776	744	760	774	545	557	550	550	0	0
<b>Australia</b>	260	293	289	275	309	301	306	292	288	255	-11	-14
<b>Brazil</b>	1.250	1.184	1.063	1.165	1.145	826	1.329	1.094	1.101	1.150	4	-2
<b>Chile</b>	1.784	1.806	1.746	1.670	1.708	1.635	1.675	1.761	1.665	1.540	-8	-9
<b>New Zealand</b>	513	476	550	478	554	539	506	576	554	586	6	8
<b>South Africa</b>	768	813	907	794	924	902	940	884	878	922	5	2
<b>Total</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>5.035</b>	<b>5.003</b>	<b>-1</b>	<b>-3</b>

# CONSOLIDATED SH PRODUCTION FORECAST BY VARIETIES

*x 1000 tons*

<i>Variety</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>F2020 (1)</i>	<i>(2)</i>	
<b>Braeburn</b>	212	209	165	135	142	126	119	122	104	93	-11	-19
<b>Cripps pink</b>	245	339	364	362	429	396	385	408	398	389	-2	-2
<b>Fuji</b>	689	708	672	749	700	636	941	676	774	729	-6	-9
<b>Gala</b>	1.892	1.835	1.845	1.796	1.984	1.746	1.968	2.096	1.931	1.959	1	-2
<b>Golden Delicious</b>	166	210	232	159	232	224	234	215	206	216	4	-1
<b>Granny Smith</b>	805	663	650	582	579	534	507	476	465	448	-4	-7
<b>Red Delicious</b>	960	902	819	770	810	824	669	664	642	627	-2	-5
<b>Others</b>	527	547	585	572	523	492	477	507	514	542	6	9
<b>Total:</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>5.035</b>	<b>5.003</b>	<b>-1</b>	<b>-3</b>

*(1) Percentage difference between F2020 and 2019*

*(2) Percentage difference between F2020 and the average of 2017 - 2018 -*

# CONSOLIDATED SH EXPORT FORECAST

(1) Last year – (2) 3 YAV

Country (MT)	2016	2017	2018	2019	F2020	(1)	(2)
Argentina	101,200	90,300	102.100	111.000	134.350	21%	33%
Australia	5,136	4,625	4,220	4,108	3,639	-12%	-16%
Brazil	30,637	55,437	71,000	57,000	60,000	5%	-2%
Chile	741,951	659,573	774.710	732.556	677.614	-8%	-6%
New Zealand	348,221	338,921	372,373	391,597	404,906	3%	8%
South Africa	425,325	417,794	393,148	423,394	446,805	6%	9%
<b>Total</b>	<b>1.652.769</b>	<b>1.625.865</b>	<b>1.717.551</b>	<b>1.719.655</b>	<b>1.725.354</b>	<b>0%</b>	<b>2%</b>

Country	Production	% export
ARG	550	0.24
AUS	255	0.02
BR	1150	0.05
CH	1540	0.44
NZ	586	0.69
RSA	922	0.48

# CONSOLIDATED SH PRODUCTION FORECAST BY COUNTRY

## Pears

*x 1000 tons*

<b>Country</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>2019</b>	<b>F2020</b>	<b>(1)</b>	<b>(2)</b>
<b>Argentina</b>	731	743	801	702	782	815	578	579	600	588	-2	0
<b>Australia</b>	130	124	129	107	104	100	102	105	94	93	-1	-7
<b>Chile</b>	194	189	200	170	188	177	149	185	193	178	-7	2
<b>New Zealand</b>	11	9	12	10	12	12	11	14	12	11	-12	-13
<b>South Africa</b>	360	361	379	399	415	432	436	423	411	406	-1	-4
<b>Total</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>1.310</b>	<b>1.276</b>	<b>-3</b>	<b>-2</b>



# CONSOLIDATED SH PRODUCTION FORECAST BY VARIETY

*x 1000 tons*

<i><b>Variety</b></i>	<i><b>2011</b></i>	<i><b>2012</b></i>	<i><b>2013</b></i>	<i><b>2014</b></i>	<i><b>2015</b></i>	<i><b>2016</b></i>	<i><b>2017</b></i>	<i><b>2018</b></i>	<i><b>2019</b></i>	<i><b>F2020 (1)</b></i>	<i><b>(2)</b></i>	
<b>Beurre Bosc</b>	38	32	38	33	30	13	13	13	13	12	-5	-7
<b>Forelle</b>	101	107	115	120	132	139	110	113	107	106	-2	-4
<b>Packham's T</b>	498	489	513	436	505	526	439	450	455	445	-2	-1
<b>Williams BC</b>	491	487	519	488	478	490	383	387	391	376	-4	-3
<b>Others</b>	298	312	336	309	354	367	331	342	344	337	-2	0
<b>Total:</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>1.310</b>	<b>1.276</b>	<b>-3</b>	<b>-2</b>

*(1) Percentage difference between F2020 and 2019*

*(2) Percentage difference between F2020 and the average of 2017- 2018 -*

# CONSOLIDATED SH EXPORT FORECAST

Country (MT)	2016	2017	2018	2019	F2020	(1)	(2)
<b>Argentina</b>	334,200	301,600	337,900	350,400	346,825	-1%	2%
<b>Australia</b>	9,841	9,111	11,912	9,062	9,005	-1%	-10%
<b>Chile</b>	125,022	148,849	129,541	134,843	124,730	-8%	-10%
<b>New Zealand</b>	4,560	3,595	4,816	3,864	4,048	5%	-1%
<b>South Africa</b>	222,192	218,426	212 149	213 666	207 052	-3%	-4%
<b>Total</b>	<b>695,475</b>	<b>681,581</b>	<b>696,318</b>	<b>711,835</b>	<b>691,660</b>	<b>-2%</b>	<b>0%</b>

Country	Production	% export
ARG	588	0.59
AUS	93	0.10
CH	178	0.70
NZ	11	0.36
RSA	406	0.51

# Challenges of the European apples and pears sector



**The EU apple & pear sector is at risk!**

Increasingly low profitability & declining consumption have significantly hampered the sustainability of the sector.

**EU policy MUST support the stabilization of the sector.**

Awareness initiative on challenges of the apples and pears sector

# Apples and pears

Key categories within the fruit basket, but facing increasing competition

or is also suffering a similar fate to  
tor:

ion 2 million T (~10% global production).

of pears = 900,000 T worth €800 million.

tically dropped from 475,000 T to 250,000 T due  
embargo & loss of the Algerian market exports  
ort value to €150 million.

as dropped with increasing competition from  
& new categories.

remain low, while labour & materials costs



The apple sector, one of the main ca  
of the EU fruit & vegetable sector, is

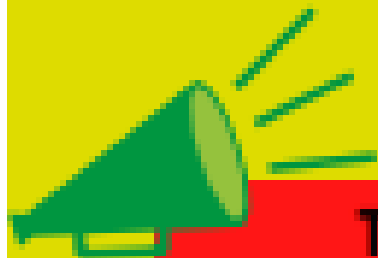
- Annual production 13 million T (~15% global pro
- Intra-EU trade of apples = 2.5 million T worth €2
- Due to the Russian embargo & loss of the Alger exports have dropped from 1.7 million T to 1 mill in a loss of more than €300 million.
- Consumption has dropped with increasing com berries, exotics & new categories.
- Labour now represents ~50% of production cos prices have not increased since the early 2000s





**freshfel**

EUROPEAN FRESH PRODUCE ASSOCIATION



**To ensure long-term sustainability,  
EU policy MUST support the stabilization of  
the apple & pear sector & boost its  
competitiveness & consumption.**

## **CAP & CMO measures**



- Attractiveness of existing tools for POs & the operational programme should be improve
- Activities undertaken under the operational programmes should focus on meeting market requirements & not further increase produc

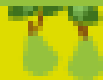
Campaign  
towards a  
better  
stabilization  
of the apples  
and pears  
markets



- Recent production development projects in the EU neighbourhood are no longer key EU export destinations.
- Eventually these locations will become net exporters to EU strategic markets.

## EU neighbourhood concerns

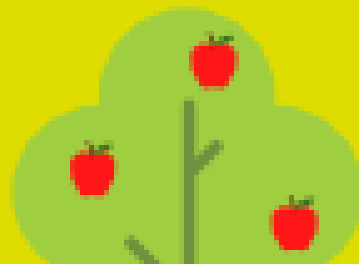
## Production toolbox & Research & Innovation



- The sector needs the right toolbox for production as it is confronted with less active substances & increased plant health pressures.
- R&I priorities need to reflect the needs of the apple and pear sector.

- Diversification away from the Russian & Algerian markets is key, but opening new markets is fragmented, timely & costly & also requires quality & taste adjustments.
- Organic production incentives must match demand.
- Organic vs conventional production CO2 emissions must be analysed.

## Market measures



Looking at  
tools box,  
R&I and  
market  
measures

# Awareness campaign and call for actions towards

- EC Commission
- National authorities
- Upcoming presidencies
- EU parliament
- Sector

# THANK YOU

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

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