

Stone fruit market developments

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

Market Observatory "Stone Fruit" - June 2020



This document has been prepared by Unit G.2 of DG AGRI, in order to stimulate discussion at the Stone Fruit Market Observatory sub-group. It is a mere working document and does not reflect any official position of the European Commission. The European Commission does not accept any responsibility with regards to the accuracy of any given data.

Structure of the presentation

1. Production & Area

2. Prices

3. Trade

1. Production & area



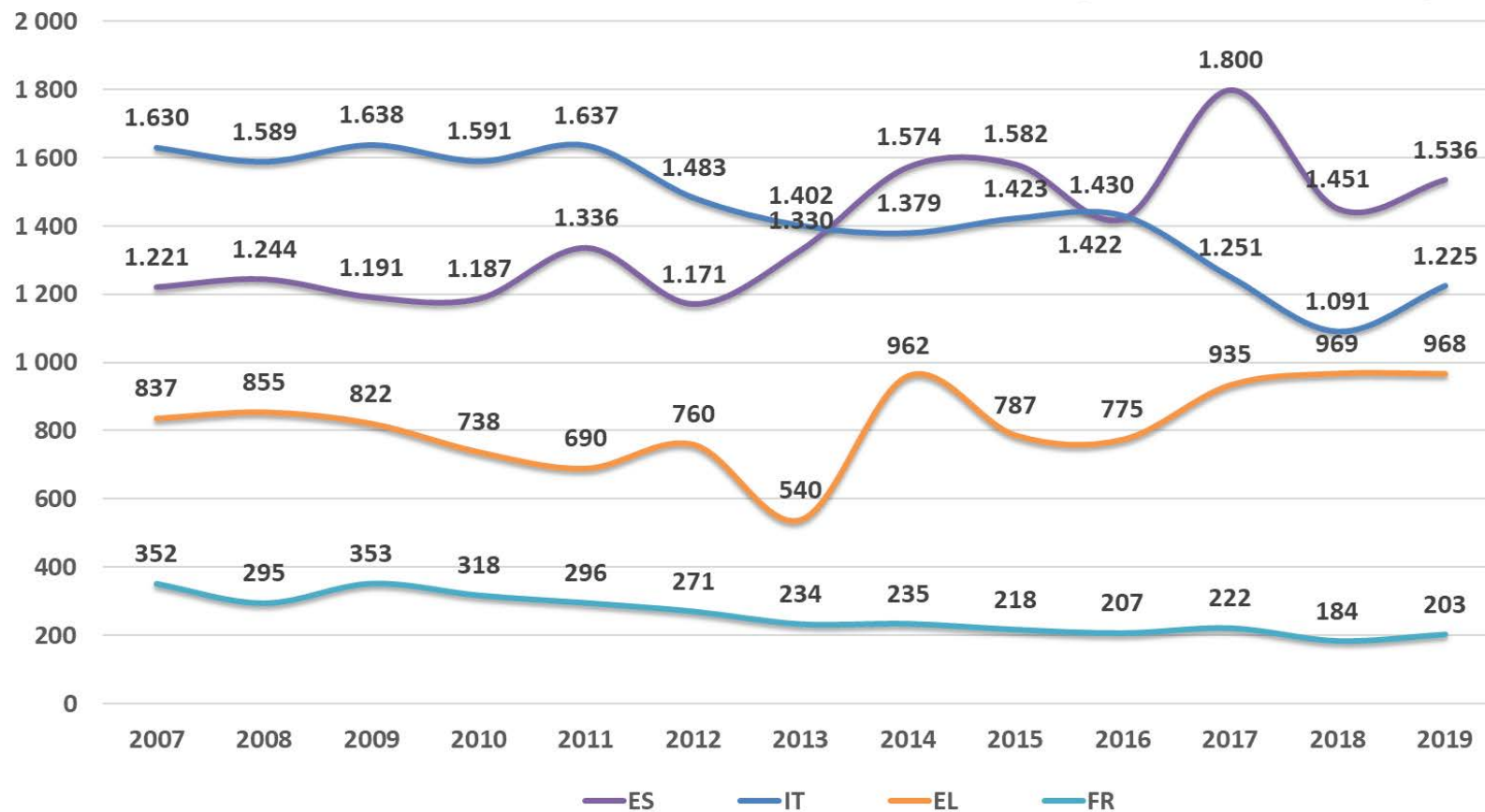
Stone Fruit : Production

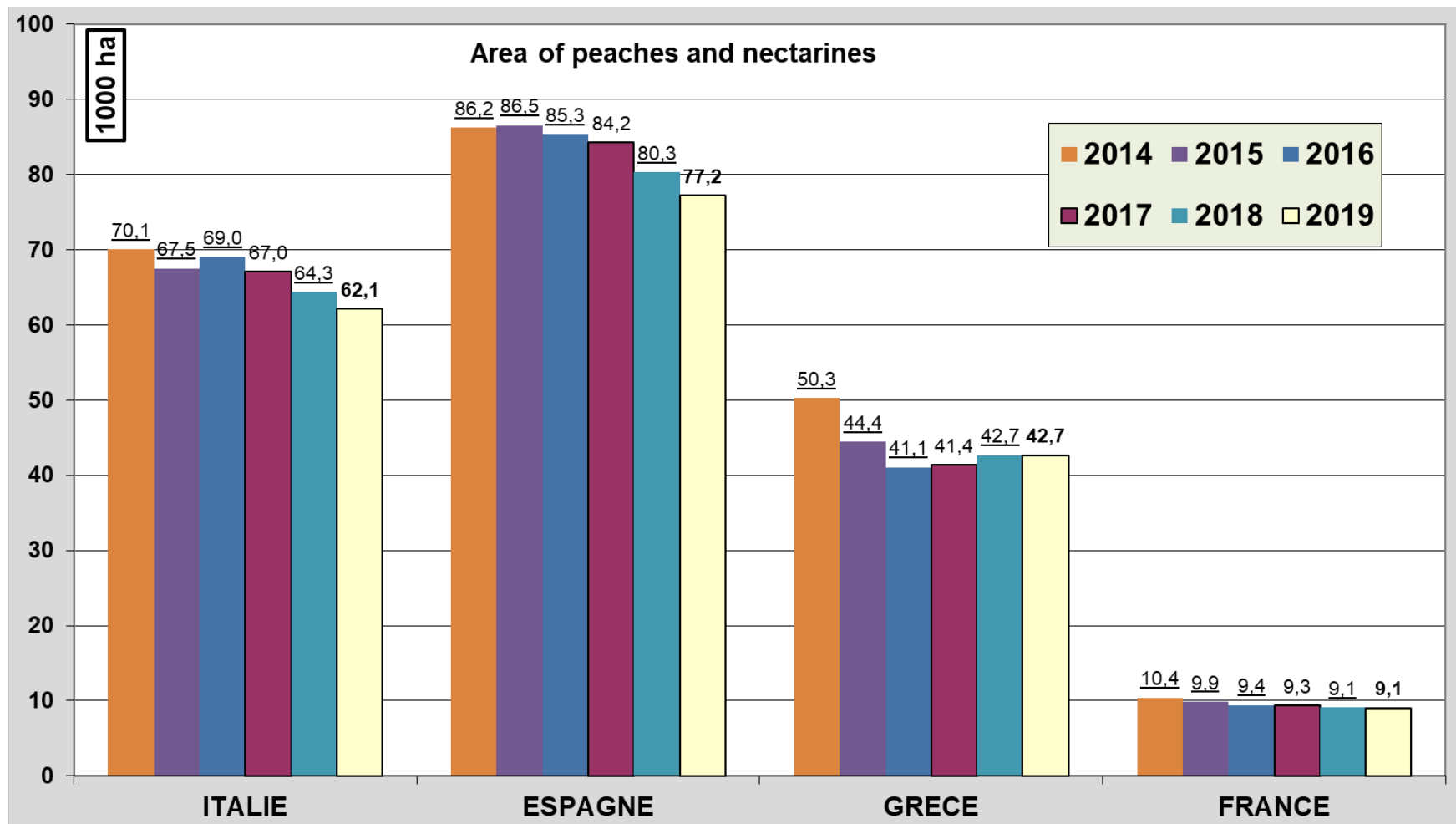
Production	Ø09-18	2018	2019	19/18	19/Ø09-18
Peaches & Nectarins	4.042	3.837	4.075	6%	1%
Apricots	687	709	756	7%	10%
Cherries	841	985	874	-11%	4%
Plums	1.475	1.772	1.634	-8%	11%
<i>Total</i>	<i>7.045</i>	<i>7.304</i>	<i>7.339</i>	<i>0%</i>	<i>4%</i>

K Tonnes - Source Eurostat - EU28 (PL: missing data except for cherries filled with average last 3 years)

- Total production in 2019 in line with the previous year (increase in peaches, nectarins and apricots compensated by decrease in cherries and plums)
- Apricots: increase thanks to good performance of Italy (#1 producer)
- Plums (Cherries): decrease due to Romania (Poland) (#1 producer) having had in 2018 an exceptionally high production

PRODUCTION OF PEACHES AND NECTARINES PER MEMBER STATE [IN THOUSAND TONNES]





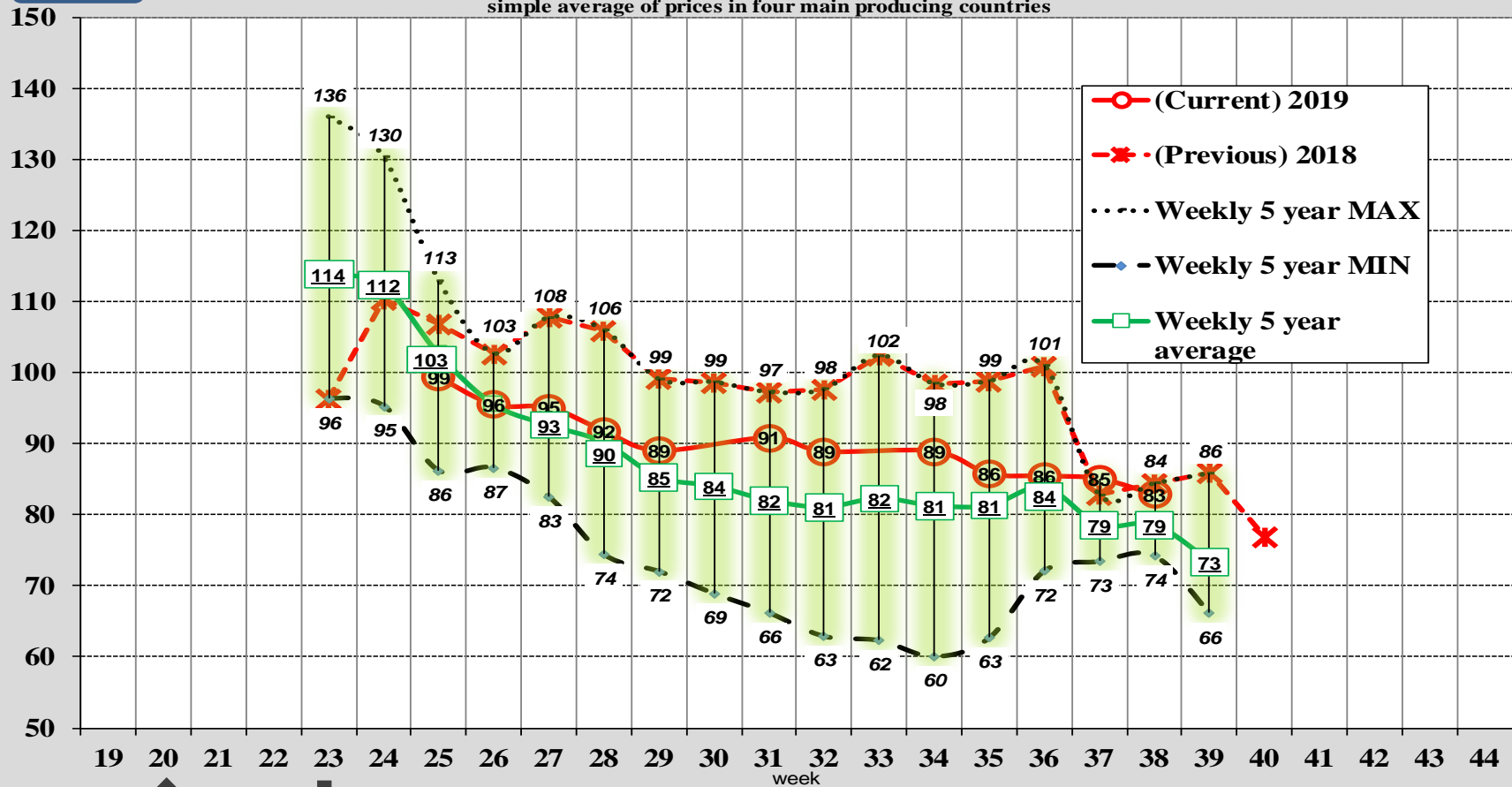
2. Prices



€100 kg

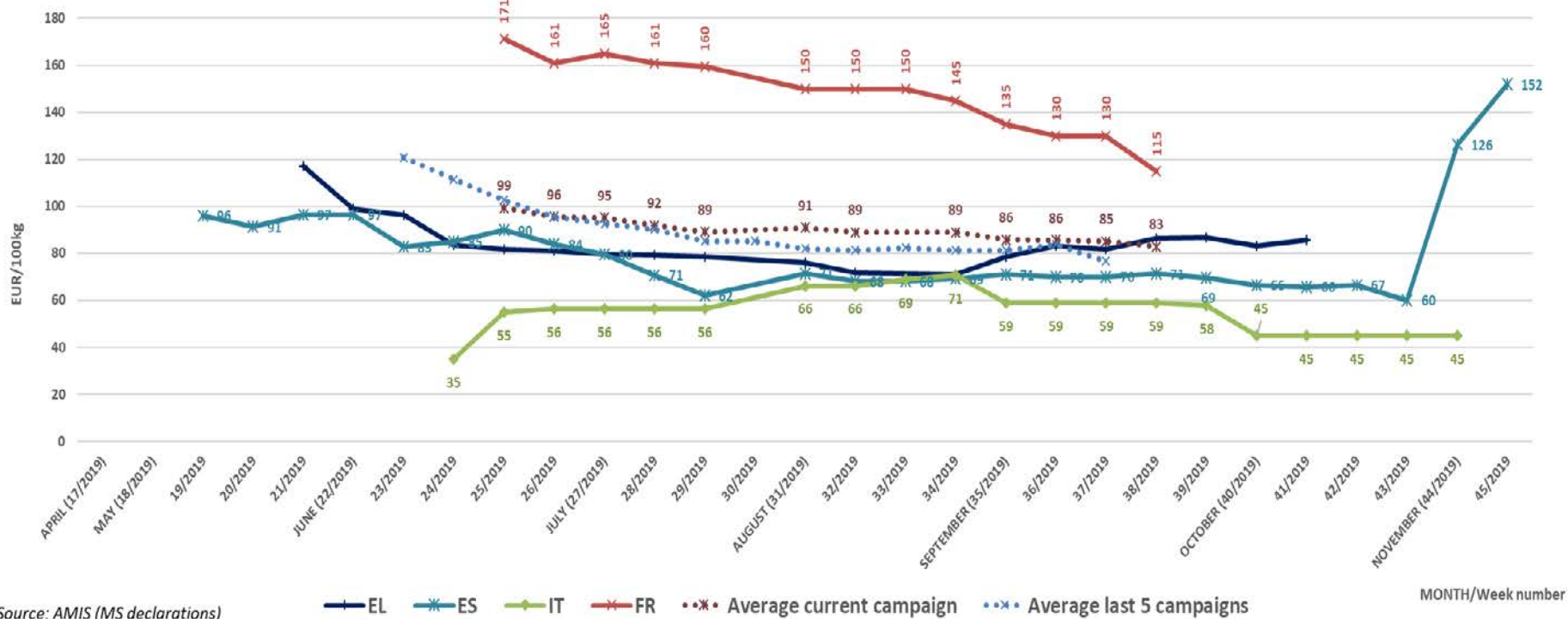
EUROPEAN UNION - Peach prices (€100kg)

simple average of prices in four main producing countries



Prices for peaches in 2019

Weekly prices - PEACHES
EL, ES, IT, FR (main producers for which prices are available)



First prices in 2020

Time	Week	19	20	21	22	AVG
	Ending	10-05-2020	17-05-2020	24-05-2020	31-05-2020	
Peaches	Spain 2020	123	144	136	122	131
	Spain AVG 15-19	125	111	112	126	119
Nectarins	Spain 2020	137	156	165	181	160
	Spain AVG 15-19	133	122	120	128	126

Source: MS notifications - Prices are expressed in €/100kg

- The season in Spain starts earlier than in other MS and it's the only country having notified prices so far (with the exception of Greece week 22 peaches)
- First prices are good (peaches +10% and nectarins +27% vs. 5 year average)

3. Trade



Peaches & nectarines: Extra-EU trade

Years	2014	2015	2016	2017	2018	2019
Total exports	357,0	296,7	226,0	251,3	155,6	178,9
Total imports	26,1	28,2	31,2	27,1	34,9	33,7
Exports / Imports	13,7	10,5	7,2	9,3	4,5	5,3
K Tonnes - Source Eurostat COMEXT - EU28						

- EU net exporter
- Imports quite stable and relatively low compared to exports
- Exports quite volatile and decreasing (mainly due to Russian ban in 2014)

Peaches & nectarines: focus on Extra-EU imports

Main exporting 3rd countries	Ø 14-18	2018	2019	2019(%)	19/18	19/14-18
South Africa	10,1	11,1	11,5	34	4%	14%
Chile	8,9	11,2	14,6	43	31%	65%
Morocco	4,3	3,9	2,7	8	-31%	-38%
Total Imports to EU28	29,5	34,9	33,7	100	-4%	14%
K Tonnes - Source Eurostat COMEXT - EU28						

- South Africa and Chile accounting for almost 80% of total EU28 imports
- Nice progression by Chile (more than 3 times from 2014) and becoming number 1

Peaches & nectarines: focus on Extra-EU exports

Main importing 3rd countries	Ø 14-18	2018	2019	2019(%)	19/18	19/14-18
Belarus	96,3	51,0	32,7	18	-36%	-66%
Switzerland	29,7	26,5	30,2	17	14%	2%
Ukraine	25,2	19,8	43,5	24	120%	73%
Total Exports from EU 28	257,3	155,6	178,9	100	15%	-30%
K Tonnes - Source Eurostat COMEXT - EU28						

- Good progression by Ukraine doubling in 2019 and becoming main export destination for EU
- Switzerland quite stable whereas Belarus continues its decrease from the boom experienced after the Russian ban
- Main 2019 MS exporters are Greece (58K) and Spain (46K)

Peaches & nectarines: focus on Intra-Eu trade

Intra-EU28 per origin	Ø 14-18	2018	2019	2019(%)	19/18	19/14-18
Spain	781,0	710,8	783,4	69	10%	0%
Italy	213,1	148,9	146,6	13	-2%	-31%
Greece	106,5	114,4	105,7	9	-8%	-1%
TOTAL EU 28	1.214,1	1.065,9	1.131,7	100	6%	-7%

K Tonnes - Source Eurostat COMEXT - EU28

Intra-EU28 per destination	Ø 14-18	2018	2019	2019(%)	19/18	19/14-18
Germany	332,9	299,6	354,3	31	18%	6%
France	155,8	150,6	135,6	12	-10%	-13%
Italy	101,2	109,7	108,3	10	-1%	7%
TOTAL EU28	1.214,1	1.065,9	1.131,7	100	6%	-7%

K Tonnes - Source Eurostat COMEXT - EU28

- Spain main intra-EU exporter and Germany main intra-EU importer
- UK intra-EU imports in 2019 of 80K (mainly from Spain) and representing almost 90% of total imports/consumption

Thank you for your attention!



Annex 1 - general trade for other stone fruit

Other stone fruits 2019	Net balance	Import	Main exporter to EU	Export	Main importer from EU
Abricot	Net exporter	12,2	Turkey (5)	17,3	Switzerland (8)
Cherries	Net importer	52,8	Turkey (32,2)	8,8	Switzerland (2,8)
Plums	Net importer	89,0	South Africa (40,6)	68,4	Brasil (17,9)
K Tonnes - Source Eurostat COMEXT - EU28					

- Abricot: similarly to P&N, the EU is a net exporter but it's mainly an intra-EU game (190K in 2019) with Spain being main intra-EU exporter
- Cherries: the EU28 is a net importer and the negative balance is widening (especially for 2019)
- Plums: the EU28 remains a net importer although the negative trade balance is reducing (exports highest in 2019 in 5 years – Brazil + 41% in 2019)

Annex 2 - Extra-EU trade for processed food

Processed 2019	Net balance	Import	Main exporter to EU	Export	Main importer from EU
Canned peaches	Net exporter	10,5	South Africa (7)	133,4	US (20,1)
Canned apricots	Net importer	18,8	South Africa (6,4)	3,6	Switzerland (0,7)
Dried apricots	Net importer	37,4	Turkey (37)	1,5	Turkey (0,6)
K Tonnes - Source Eurostat COMEXT - EU28					

- Canned peaches: positive trade balance widening in 2019 (US +97%) and diversified exporting market (8 countries with at least 5% market share)
- Canned apricots: the overall trend is reduced trade flows especially for imports (lowest value in 10 years)
- Dried apricots: the overall trend is increased trade flows especially for exports (market dominated by Turkey)