



Apples and pears data SH season2022



Consolidated SH production: Apple forecast by country

Apples

| Apples | x 1000 tons | | | | | | | | | | | |
|--------------|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-----------|-----|-----|
| Country | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | F2022 (1) | (2) | |
| Argentina | 776 | 744 | 760 | 774 | 545 | 557 | 550 | 578 | 502 | 445 | -11 | -18 |
| Australia | 289 | 275 | 309 | 301 | 306 | 292 | 288 | 263 | 321 | 311 | -3 | 7 |
| Brazil | 1.063 | 1.165 | 1.145 | 826 | 1.329 | 1.094 | 1.101 | 939 | 1.277 | 900 | -30 | -19 |
| Chile | 1.746 | 1.670 | 1.708 | 1.635 | 1.675 | 1.761 | 1.665 | 1.515 | 1.485 | 1.455 | -2 | -6 |
| New Zealand | 550 | 478 | 554 | 539 | 506 | 576 | 554 | 575 | 515 | 590 | 15 | 8 |
| South Africa | 907 | 794 | 924 | 902 | 940 | 884 | 878 | 991 | 1.117 | 1.163 | 4 | 17 |
| Total | 5.331 | 5.126 | 5.400 | 4.977 | 5.300 | 5.165 | 5.035 | 4.861 | 5.217 | 4.864 | -7 | -3 |

Crop = - 7%
4.864.000 T
Up: RSA, NZ and AUS
Down: ARG, BR, CL

Up: Cripps Pink , Golden
Down: Fuji, Gala

| | x 1000 tons | | | | | | | | | | | |
|------------------|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-----|-----|
| Variety | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | F2022 | (1) | (2) |
| Braeburn | 165 | 135 | 142 | 126 | 119 | 122 | 104 | 72 | 80 | 86 | 8 | 0 |
| Cripps pink | 364 | 362 | 429 | 396 | 385 | 408 | 398 | 409 | 580 | 589 | 2 | 27 |
| Fuji | 672 | 749 | 700 | 636 | 941 | 676 | 774 | 616 | 797 | 561 | -30 | -23 |
| Gala | 1.845 | 1.796 | 1.984 | 1.746 | 1.968 | 2.096 | 1.931 | 1.864 | 1.841 | 1.706 | -7 | -9 |
| Golden Delicious | 232 | 159 | 232 | 224 | 234 | 215 | 206 | 224 | 242 | 252 | 4 | 12 |
| Granny Smith | 650 | 582 | 579 | 534 | 507 | 476 | 465 | 492 | 515 | 504 | -2 | 3 |
| Red Delicious | 819 | 770 | 810 | 824 | 669 | 664 | 642 | 607 | 486 | 455 | -6 | -21 |
| Others | 585 | 572 | 523 | 492 | 477 | 507 | 514 | 577 | 676 | 711 | 5 | 21 |
| Total: | 5.331 | 5.126 | 5.400 | 4.977 | 5.300 | 5.165 | 5.035 | 4.861 | 5.217 | 4.864 | -7 | -3 |



Consolidated SH

Apple export forecast

| Country | 2018 | 2019 | 2020 | 2021 | F2022 | (1) | (2) |
|--------------|------------------|------------------|------------------|------------------|------------------|--------------|--------------|
| Argentina | 102.100 | 111.000 | 97.206 | 80.320 | 72.000 | -10.36% | -25.14% |
| Australia | 4.220 | 5.812 | 2.150 | 2.664 | 2.489 | -6.57% | -29.73% |
| Brazil | 71.000 | 57.000 | 62.000 | 99.048 | 35.000 | -64.66% | -51.85% |
| Chile | 774.710 | 732.556 | 652.163 | 639.197 | 626.076 | -2.05% | -7.20% |
| New Zealand | 372.373 | 391.597 | 399.581 | 353.989 | 415.822 | 17.47% | 8.93% |
| South Africa | 393.148 | 412.600 | 458.920 | 559.247 | 593.375 | 6.10% | 24.42% |
| Total | 1.717.551 | 1.710.565 | 1.672.020 | 1.734.465 | 1.744.762 | 0.59% | 2.29% |



Consolidated SH production Pear forecast by country

Pears

x 1000 tons

| Country | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | F2022 | (1) | (2) |
|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|-----------|-----------|
| Argentina | 801 | 702 | 782 | 815 | 578 | 579 | 600 | 648 | 603 | 522 | -13 | -15 |
| Australia | 129 | 107 | 104 | 100 | 102 | 105 | 94 | 85 | 86 | 81 | -6 | -8 |
| Chile | 200 | 170 | 188 | 177 | 149 | 185 | 193 | 166 | 136 | 122 | -11 | -26 |
| New Zealand | 12 | 10 | 12 | 12 | 11 | 14 | 12 | 13 | 9 | 11 | 31 | 2 |
| South Africa | 379 | 399 | 415 | 432 | 436 | 423 | 411 | 438 | 467 | 492 | 5 | 12 |
| Total | 1.521 | 1.388 | 1.500 | 1.535 | 1.276 | 1.305 | 1.310 | 1.350 | 1.302 | 1.229 | -6 | -7 |

Crop = - 6%
1.229.000 T
Up: RSA, NZ
Down: ARG, AUS, CL

Up: Forelle
Down: Williams , Packham

x 1000 tons

| Variety | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | F2022 | (1) | (2) |
|---------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|-----------|-----------|
| Beurre Bosc | 38 | 33 | 30 | 13 | 13 | 13 | 13 | 11 | 6 | 6 | -3 | -41 |
| Forelle | 115 | 120 | 132 | 139 | 110 | 113 | 107 | 111 | 115 | 121 | 6 | 9 |
| Packham's T | 513 | 436 | 505 | 526 | 439 | 450 | 455 | 493 | 464 | 444 | -4 | -6 |
| Williams BC | 519 | 488 | 478 | 490 | 383 | 387 | 391 | 359 | 351 | 306 | -13 | -17 |
| Others | 336 | 309 | 354 | 367 | 331 | 342 | 344 | 376 | 365 | 352 | -4 | -3 |
| Total: | 1.521 | 1.388 | 1.500 | 1.535 | 1.276 | 1.305 | 1.310 | 1.350 | 1.302 | 1.229 | -6 | -7 |



Consolidated SH: Pear export forecast

| Country | 2018 | 2019 | 2020 | 2021 | F2022 | (1) | (2) |
|--------------|---------|---------|---------|---------|---------|---------|---------|
| Argentina | 337.900 | 350.400 | 336.297 | 315.000 | 271.000 | -13.97% | -18.84% |
| Australia | 11.912 | 9.434 | 8.522 | 9.334 | 8.131 | -12.89% | -10.62% |
| Chile | 129.541 | 134.843 | 112.043 | 125.043 | 111.665 | -10.70% | -9.93% |
| New Zealand | 4.816 | 3.864 | 2.638 | 2.179 | 2.469 | 13.31% | -14.68% |
| South Africa | 212.149 | 213.666 | 210.264 | 229.528 | 247.942 | 8.02% | 13.83% |
| Total | 696.318 | 712.207 | 669.764 | 681.084 | 641.207 | -5.85% | -6.76% |



SH apples – Qualitative comparison: Climatic conditions during spring up to summer

| Country | Temperature trends | Frost | Heat wave | Hail | Droughts | Floods | Storms/strong winds |
|--------------|--------------------------------------|-----------------------------|-----------------|---|--|--------|-----------------------------|
| Argentina | Extreme highs and lows | Light but at critical times | Twice, moderate | Random storms in production area | In irrigation area | None | None |
| Australia | Wetter, cooler spring; milder summer | None | None | Isolated hail storms, particularly in Tasmania, South Australia | Easing drought in NSW and Qld with rains in early 2021 | None | Associated with hail storms |
| Brazil | | Some minor episodes | Yes | Some minor episodes | Severe | None | None |
| Chile | | | | | | | |
| New Zealand | None | None | None | None | None | None | None |
| South Africa | Cool, natural spring | None | None | None | None | None | None |



General comments for SH season

- Still impact of COVID pandemic, among other on shortage of labour
- On-going move towards new varieties
- For both apples and pears seasons to be in advance (one week) in South America, on average in South Africa and late (one week) in Oceania
- Sizing average to good for apples in all countries expect for Brazil (smaller) and for pears averages in South Africa and slightly bigger in South America