

# PIPFruit SEASON 2023/2024 FIRST UPDATE AND PERSPECTIVES



WAPA- WORLD APPLES AND PEARS ASSOCIATION



# EU apples - forecast 2023/2024 August 2023

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	%2023/ 2022
Austria	188	177	40	67	184	146	126	120	151	111	↓ -26,25%
Belgium	318	285	234	88	231	242	168	250	239	203	↓ -14,92%
Croatia	62	101	35	66	86	60	55	65	57	65	↑ 14,50%
Czechia	131	156	139	102	145	103	118	110	138	103	↓ -25,69%
Denmark	26	24	24	19	24	15	24	18	24	15	↓ -37,50%
France	1.444	1.674	1.514	1.424	1.477	1.651	1.337	1.383	1.391	1.501	↑ 7,91%
Germany	1.116	973	1.033	597	1.093	991	1.023	1.005	1.072	952	↓ -11,19%
Greece	245	242	259	231	301	276	280	246	321	212	↓ -33,79%
Hungary	920	522	498	530	782	452	350	520	280	550	↑ 96,43%
Italy	2.456	2.280	2.272	1.704	2.264	2.096	2.124	2.053	2.113	2.104	↓ -0,42%
Latvia	10	8	10	8	14	10	14	8	10	5	↓ -50,41%
Lithuania	27	46	50	48	62	26	52	36	51	35	↓ -31,37%
Netherlands	353	336	317	228	267	272	220	243	235	207	↓ -11,73%
Poland	3.750	3.979	4.035	2.870	4.810	2.910	3.410	4.300	4.495	3.995	↓ -11,12%
Portugal	272	329	263	314	267	354	278	368	291	313	↑ 7,32%
Romania	382	336	327	230	425	327	384	444	405	406	↑ 0,36%
Slovakia	46	40	17	15	44	35	30	31	32	27	↓ -16,67%
Slovenia	69	71	12	6	72	36	46	44	50	47	↓ -6,76%
Spain	505	482	495	480	476	555	425	563	412	536	↑ 30,11%
Sweden	17	21	20	18	32	20	32	27	30	24	↓ -20,00%
<b>Total</b>	<b>12.335</b>	<b>12.083</b>	<b>11.594</b>	<b>9.044</b>	<b>13.056</b>	<b>10.578</b>	<b>10.496</b>	<b>11.834</b>	<b>11.796</b>	<b>11.411</b>	<b>↓ -3,27%</b>



# EU pears - forecast 2023/2024 August 2023

Country	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	%F2023 /2022	%F2023 /3Y AVG
Belgium	374	369	322	310	369	332	393	356	346	412	↑ 19,1%	↑ 13,0%
Croatia	2	2	1	6	4	3	2	2	2	2	→ 0,0%	→ 0,0%
Czechia	4	10	7	4	7	6	6	7	7	9	↑ 18,0%	↑ 27,4%
Denmark	6	6	6	5	6	4	6	6	7	7	→ 0,0%	↑ 10,5%
France	131	155	138	133	134	121	133	58	147	105	↓ -28,6%	↓ -6,8%
Germany	45	43	35	23	45	42	39	37	36	37	↑ 2,8%	↓ -0,9%
Greece	37	60	47	59	60	58	80	67	99	71	↓ -28,6%	↓ -13,8%
Hungary	40	33	38	35	38	32	16	16	15	20	↑ 33,3%	↑ 26,8%
Italy	736	764	681	738	730	363	611	202	505	187	↓ -63,0%	↓ -57,4%
Latvia	1	0	0	0	0	1	1	1	1	0	↓ -42,2%	↓ -46,1%
Netherlands	349	349	374	330	402	373	400	340	352	341	↓ -3,1%	↓ -6,3%
Poland	50	80	55	40	70	70	65	70	95	100	↑ 5,3%	↑ 30,4%
Portugal	203	134	113	186	142	202	139	225	132	138	↑ 3,9%	↓ -17,0%
Romania	17	13	16	12	21	16	19	21	18	18	↑ 2,6%	↓ -6,2%
Slovakia	0	1	0	1	1	1	1	1	1	1	↓ -14,5%	↓ -3,4%
Slovenia	4	4	1	0	5	1	1	1	3	1	↓ -80,0%	↓ -66,9%
Spain	400	344	311	331	298	313	307	309	236	296	↑ 25,5%	↑ 4,3%
Sweden	1	1	1	1	2	1	2	2	2	2	→ 0,0%	→ 0,0%
<b>Total</b>	<b>2.401</b>	<b>2.369</b>	<b>2.146</b>	<b>2.214</b>	<b>2.335</b>	<b>1.939</b>	<b>2.219</b>	<b>1.721</b>	<b>2.003</b>	<b>1.746</b>	↓ -12,9%	↓ -11,9%



# EU apples and pears crop forecast 2023/2024

## Parameters for a production update

- Still early for new official update as harvesting is not fully completed yet and packing going
- Only indicative trends can be provided at this stage on total figure some Member States based on trends, without final figure by varieties
- Some summer climatic events influenced crops after the early August Prognosfruit
  - heavy rains and even floodings
  - hails
  - warm nights and not enough gap days/night
  - qualitative issues due to pests
  - ongoing drought
- As a result crop forecast of August might be reviewed
  - for apples from initial 11,4 Mio T, forecast is expected to be lowered just below 11 Mio T
  - for pears from initial 1,74 Mio T, forecast is expected to be lowered to 1,72 Mio T, a peak low production



# EU apples and pears market 2023/2024: Favourable factors

- Empty stocks leading to strong demand for the new crop and long term planning into the season to secure supply
- Good starting prices ex-packing
- Low SH imports due to their crop also impacted by climatic conditions , market diversification , logistic hurdles
- Low apples crop in China, but also in India and revision downwards of crop in EU neighbourhoof
- Demand for processing with dfferent drivers/prices according to MS, but overall strong demand due to several factor; low AJC stocks , good demand to secure avaiability of product, lower crop inparticular in China, lower availability of orange juice
- Lower pear crop and also lower citrus crop expected in NH
- Export to third countries with good demand but some questions on markets impacted directly or indirectly by geopolitical issues



# EU apples and pears crop forecast 2023/2024

## Challenges to overcome

- Purchasing power of consumers still under pressure in particular for food purchase and stagnation/ decline of consumption is on-going
- Pressure of the market against premium higher prices products including organic
- Impact of climate change on the quality of the products ( colouring , size , insect damages ,..) and some smaller growers impacted by rising costs unable to properly protect crop
- Growing geopolitical risks ( Ukraine / Belarus ) but also now South East of Mediterranean ( impact on Israel, Jordan, Egypt,...) which are important market for PL ( consequences on demand, logistics hurdles in port , insecurity leading to higher insurance rate.
- Secure a rise of purchasing prices to compensate and mitigate the impact of rising costs ( labour, energy ,PPP , packaging,...) of previous months



# **APPLES** are a nutritious fruit:



**High in fibre**



**Saturated  
fat free**



**Naturally  
fat free**



**Low fat food**



**Naturally  
occurring  
sugars**



**Naturally  
sodium free**



**Contain  
fructose**



**Naturally  
salt free**



WORLD APPLES DAY SATURDAY 19 NOVEMBER 2022



## **PEARS** are a nutritious fruit:



**High in fibre**



**Saturated fat free**



**Naturally fat free**



**Low fat food**



**Naturally occurring sugars**



**Naturally sodium free**



**Contain fructose**



**Naturally salt free**





Many thanks



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