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DIRECTORATE-GENERAL FOR AGRICULTURE AND RURAL DEVELOPMENT

Directorate G. Markets and Observatories

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DRAFT MINUTES

Meeting of the « FORECAST WORKING GROUP ON CDG "HORTICULTURE, OLIVES AND SPIRITIS, APPLES AND PEARS"

Date: 01/12/2017

Chair: European Commission (Mr Luis FLOREZ)

Organisations present: All organisations were present.

1. Approval of the agenda (and of the minutes of previous meeting[1])

2. Nature of the meeting

The meeting was non-public.

3. List of points discussed [Name of each point, one by one]

3.0 INTRODUCTION

As one of the main items of the agenda, the Commission presented an analysis of the apple and pear sectors in the EU, based on the statistical working documents and a document on trade available on CircaBC and also online in the website of Europa regarding the dashboard for apples. The main sources of data are Eurostat, Comext and WAPA/Prognosfruit (point 3.3). This was complemented by a presentation made by Freshfel on the Northern Hemisphere (point 3.1).

3.1 FORECAST NORTHERN HEMISPHERE CAMPAIGN 2017/2018

The representative from Freshfel presented the main indicators on the development of the ongoing campaign in the Northern Hemisphere.

[1] If not adopted by written procedure (CIRCABC)

- **Apples**

The EU production forecast for 2017/18 is 9,344 million tonnes, i.e. 23% lower than in in the preceding 3 year average (21% lower when compared to the previous marketing year). This represents the lowest crop in the EU since 2008.

Such a huge reduction on the apple crop is mainly due to spring frosts between April and May 2017. Frost damages depend also on the level of technical preparedness of the Member States for this weather anomaly. Among the 4 major producers Germany registered a reduction of almost half of the crop (-46%) on the preceding 3 year average. A further weather anomaly was a very warm summer in 2017.

A summary on the quality of the EU crop is as follows:

- Sizing, generally largest size due to fruit drop and damage eliminated through thinning
- Frost ring and russetting present
- Hail damage
- Limited long term storability of produce

World production in 2017/18 is estimated at 76,2 million tonnes, down by 2,6 million tonnes.

Concerning third countries in the Northern Hemisphere, China (more than a half of the EU production, about 44,5 tonnes projected) is expected to continue its upwards trend. US production is expected to decrease by 260 000 tons to 4,7 million.

- **Pears**

The EU production in 2017/18 is forecasted at 2.15 million tonnes, 8% percent lower than the preceding 3 year average (and 1% less than the previous marketing year). Among major producers and exporters, the Netherlands is expected to have the most important crop reduction (-14% on a 3 year average).

World production is forecast up slightly to 25,1 million tonnes (from 24,9 the previous year) mainly due to gains in China.

In Northern Hemisphere third countries, production is expected to grow in China (19 million tonnes. US production is expected to move slightly down to 640 000 tonnes. Argentina's production is expected to rise to 600 000 tonnes.

3.2 SOUTHERN HEMISPHERE SEASON OVERVIEW

- **Apples**

The overall production in the Southern Hemisphere (5,3 million tonnes in 2017/18) would be up by 1% when compared to the 3 year average. No changes are expected in the case of Chile, the main exporter of this geographical area.

- **Pears**

Pear production in the Southern Hemisphere is forecasted at 1,3 million tonnes in 2017/18 (10% down on the 3 year average). Argentina, the number 1 exporter of this area is expected to have a 18% reduction on production on the above mentioned average.

3.3 EXCHANGE OF VIEWS ON THE MARKET SITUATION (DASHBOARD)

The small apple crop (-23% on a 3 year average) implies a relative "shortage" of supplies in the EU and high prices. When huge damages were announced with the spring frosts, prices suddenly moved upwards. During the ongoing marketing year average EU prices were moving upwards stabilizing in November at above 40% over the 5 year average. Among major producers (at Member State level) Germany registered the highest increases (+117%), followed by Poland (+73%).

The dashboard of DG Agri provides with further detail and regular updates on the market situation.

https://ec.europa.eu/agriculture/sites/agriculture/files/dashboards/apple-dashboard_en.pdf

Given the "small" crop, prices are expected to remain high during the whole marketing year. Extra-EU imports are likely to be much higher and extra-EU exports much lower as data already available for a few months of the current marketing year indicate.

3.4 CONSUMPTION ESTIMATES AND EXTRA-EU EXPORT DEVELOPMENT

Avoiding a decrease on consumption of fruit and vegetables and developing extra-EU markets for fruit and vegetables of EU origin can be seen as two of the main "engines" that can help to sustain and/or increase the incomes of EU producers.

Specialized press announces frequently downwards trends on fruit and vegetable consumption which has an impact on healthy diets and population wellbeing. This is also the case for apples. A representative of Freshfel presented the key figures on apple consumption. EU Member States have major differences on volumes of consumption (from 7 to 29 kg per inhabitant), including per variety, and on consumption trends as well. EU average consumption is declining but apples remain the single largest fruit category consumed. National and local products remain dominant in apple consumption. Strategies for evaluating and promoting apple consumption seem necessary.

The representative of DG Trade presented the EU Commission strategy for opening new markets for apples. Following the export ban, the diversification of the international markets destinations is one of those big challenges, aiming at making farmers more independent on perturbations on a specific given market. The European Commission focused its efforts on the continuous opening of new markets through promotion actions and international negotiations. The objective of all our commercial agreements is to eliminate tariffs on our products, to dismantle non-tariff barriers, and to achieve further protection for our geographical indications.

3.5 INTERNATIONAL AWARD "BEST GOLDEN APPLE", LLEIDA 2017 (BY COPA-COGECA)

The Institute of Research and Agri-Food Technology (IRTA) of Lleida (Spain) is providing scientific advice on the organization in Lleida of the International Golden Apple Award, an award that aims to give value, targeted to consumers, to the production of fruit. Golden is the most important of the apple varieties.

The sensory quality of the fruit of the farmers participating to this award will be analysed. IRTA has a trained panel of experts in order to objectively evaluate quality features of apples such as taste, sweetness, acidity, crocanticity, firmness and juiciness.

https://www.youtube.com/watch?v=q2aHOzKyI0U

3.6 REPEAR PROJECT: POST-HARVEST PEAR PRESERVATION BASED ON NATURAL ANTIOXIDANT COMPOUNDS

The coordinator of this project outlined the ongoing key findings derived from this project. REPEAR is cofounded by the 7th Research Framework Programme of the Commission. It gathers 9 partners from different Member States including professional associations (PRS, FNAP and EUCOFEL), SMEs (Soto del Ebro, Xeda and HS Luftfilterbau) and research centres (IRTA, University of Malta and INSPIRALIA).

During the cold storage of pears, the main cause of deterioration is the scald. Until now, the control of superficial scald has been carried out with chemical synthetic antioxidants. However, a proposal for new EU legislation bans the use of the most common chemical treatments for pears. REPEAR aims at developing post-harvest pear preservation based on natural compounds and a novel fungicide industrial filter.

The combination of Postharvest Management measures with the application of the REPEAR coating and the novel air filtration system reduces a 25% of the pear production losses after 8 months of cold storage compared to the current existing commercial solutions.

4. Conclusions/recommendations/opinions

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5. Next steps

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6. Next meeting

The next meeting is scheduled for 2018 (date to be confirmed).

7. List of participants - Annex

(e-signed)
João ONOFRE

List of participants– Minutes

FORECAST WORKING GROUP ON "APPLES AND PEARS"

Date: 01/12/2017

	MEMBER STATES (ONG)	NAME OF REPRESENTATIVES
1	BEL	BINARD. PH
2	ESP	BORDA LLOBET. D
3	ESP	CABEZON. L
4	CZE	CHALOUPKA ;.R
5	ESP	CORBALAN. J
6	ITA	DALPIA .A
7	BEL	DEJONCKHEER . D
8	BEL	EVARD . A
9	PRT	FERREIRA. A
10	FRA	GUERIN
11	FRA	PEYRES. M
12	SUK	PAZIKY.M
13	NLD	RIJNOUT. P
14	D	DERUWE