Common Market Organisation (CMO) Fruit and vegetables sector

Market situation for F&V in the EU

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

Civil Dialogue Group "Fruits & Vegetables" – 27 September 2019

European Commission

Market situation for F&V in the EU

1. Market context
2. Vegetables
3. Fruit

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1. Market context

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1. Market context

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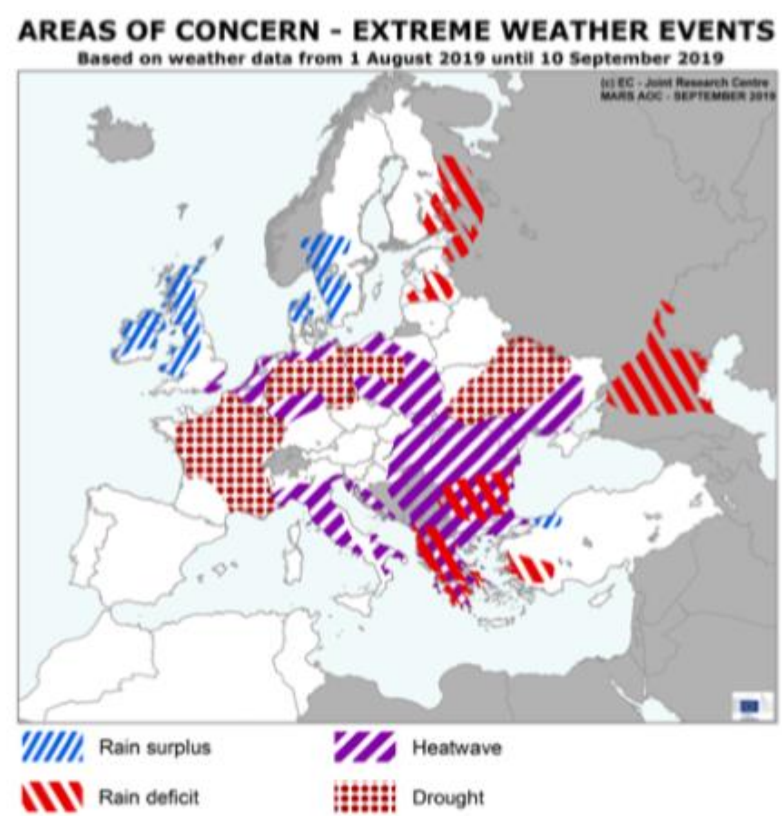
1. Market context

- ***Spring frosts and prolonged drought:***
  - ➢ Reduced yields in Poland: *apples, pears, cherries, berries*
  - ➢ High prices for fruit
  - ➢ Quality affected

1. Market context



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1. Market context

- ***Hottest summer on record:***
  - ➢ Shortages brassicas *(broccoli, cauliflower)*
  - ➢ Increase in irrigation and pest control costs

1. Market context

1. Market context

- ***Floods in south-eastern Spain in September (cold drop):***
  - Extensive losses F&V, damages infrastructure
  - Most affected: open-field cultivations *(leaf vegs, table grapes)*
  - Various impact: greenhouses, *citrus*

1. Market context

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1. Market context

- ***Russian ban***:
  - Prolonged until end 2020
  - Russia towards self-sufficiency: open-field, greenhouse, *apples*
  - Facilitates imports: Moldova *(apples)*, Turkey *(tomatoes)*
  - But growing tensions with Belarus, Ukraine

1. Market context

- ***FTA negotiations***:
  - Mercosur, Vietnam: concluded - ratification MS, Council, EP
  - Australia & New Zealand: ongoing
- ***US:***
  - China: Mutual imposition tariffs - possible economic slowdown
  - EU: Dispute over aircraft subsidies – possible additional tariffs

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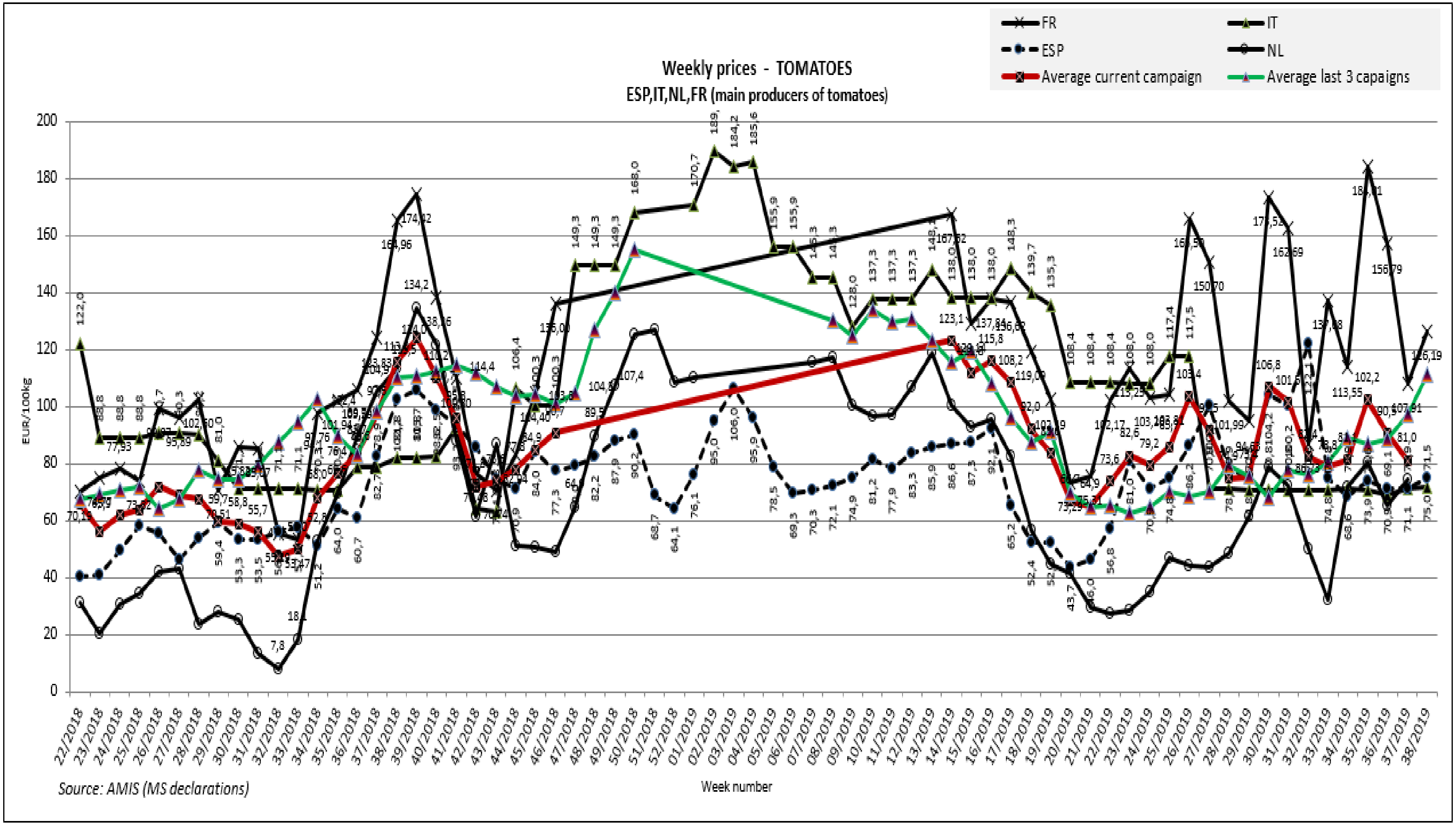
2. Vegetables

- Average winter market season
- Concentrations of supply - warm weather certain periods
- Prices dropped in May - overlapping ES-IT with BE-FR-NL
- Price recovery in June – warm weather, increased demand


Weekly prices - TOMATOES
ESP,IT,NL,FR (main producers of tomatoes)
FR
IT
ESP
NL
Average current campaign
Average last 3 capaigns
EUR/100kg
Week number
Source: AMIS (MS declarations)

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3. Fruit

- Low crop forecast *(-20% apples, -14% pears / 2018-19)*
- Highest decrease in PL due to spring frost *(-44%)*
- Prices recovering at the start of the season

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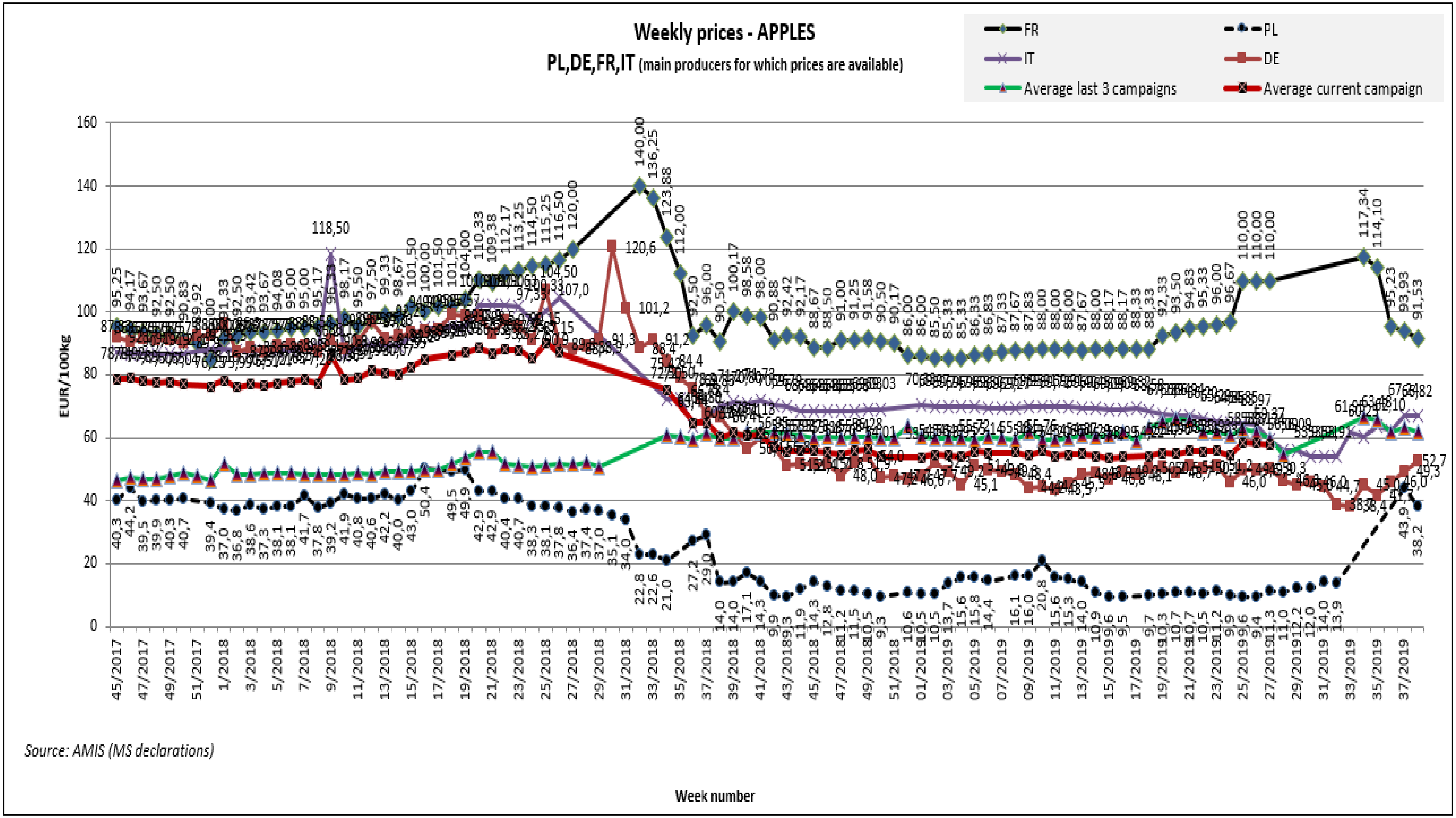

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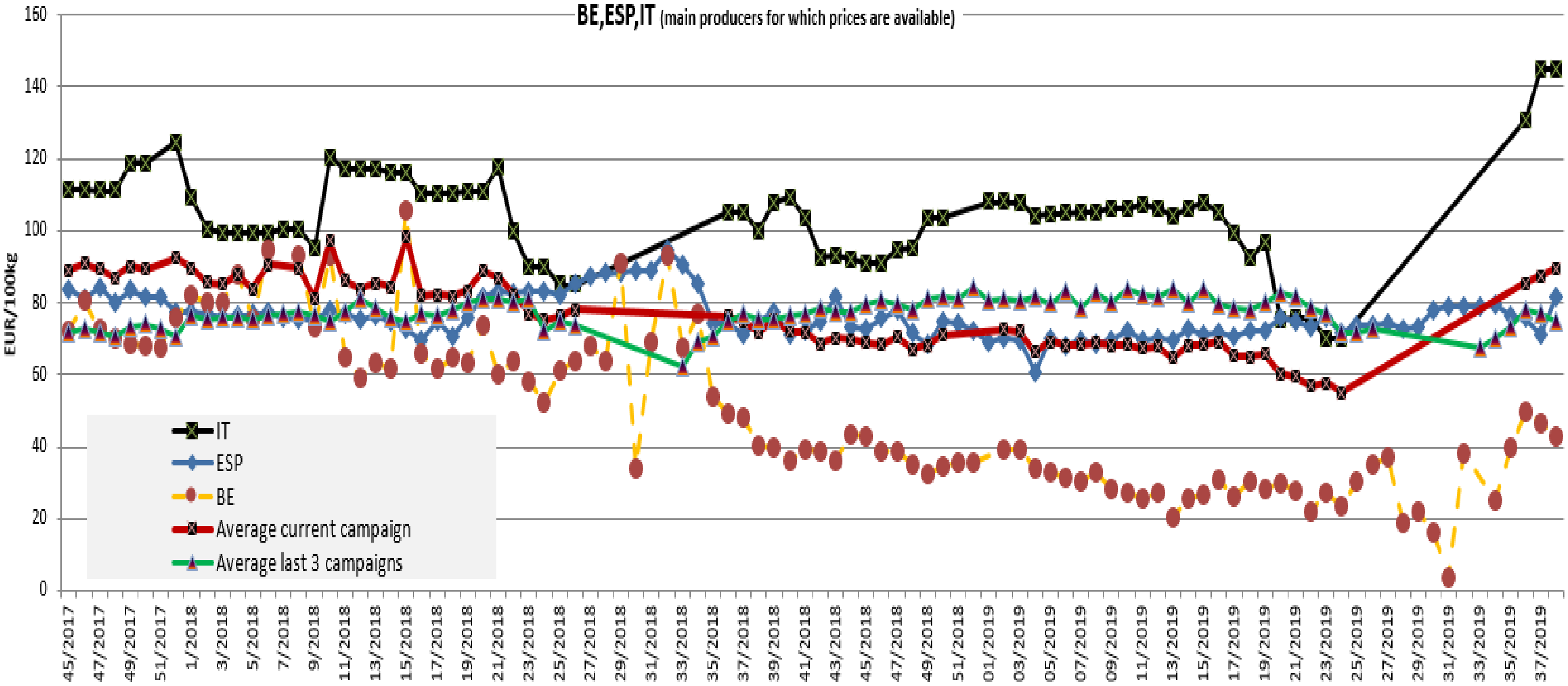
Weekly prices - PEARS

BE,ESP,IT (main producers for which prices are available)



Source: AMIS (MS declarations)

Week number

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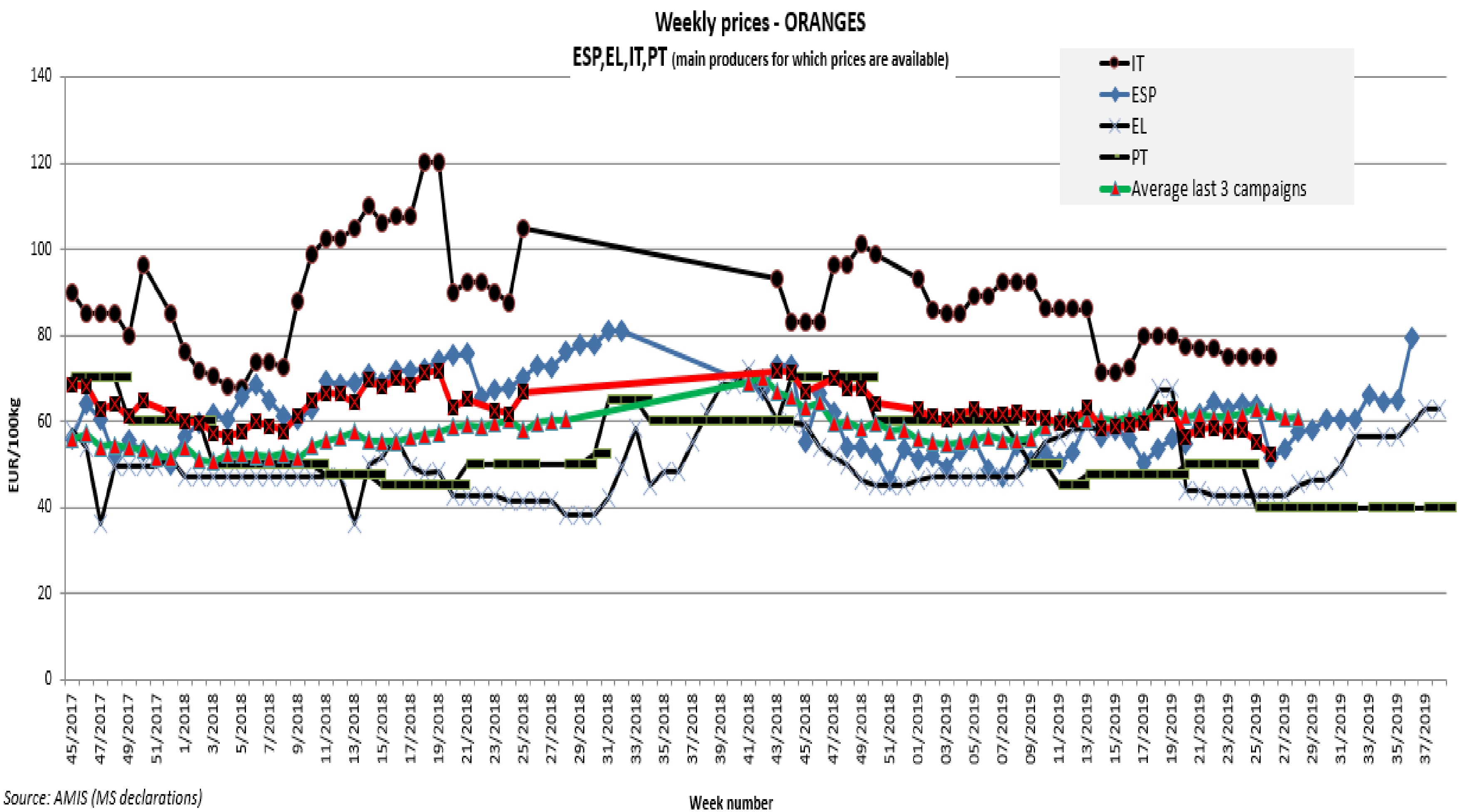
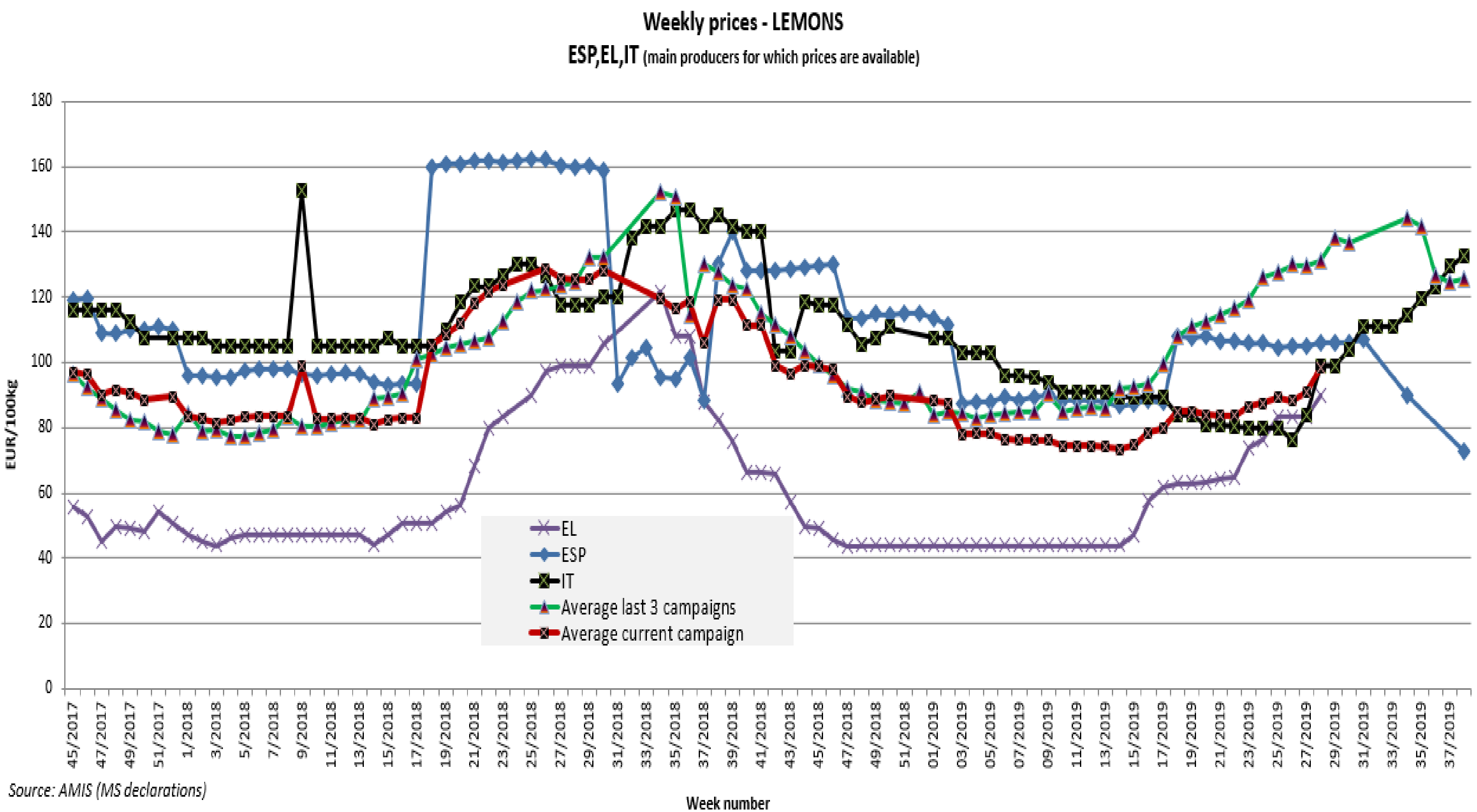
3. Fruits

- Campaign with lower crop and better sizes
- Significant decrease in ES *(-17%, -30% Valencia)*
- Better prices than last campaign – but some uncertainty
- Some impact floods in south-east Spain



Source: AMIS (MS declarations)

European Commission



Source: AMIS (MS declarations)

3. Fruits

- Bad early season in ES – low consumption, quality fruit
- Average prices afterwards – no overlapping
- But IT prices remained very low

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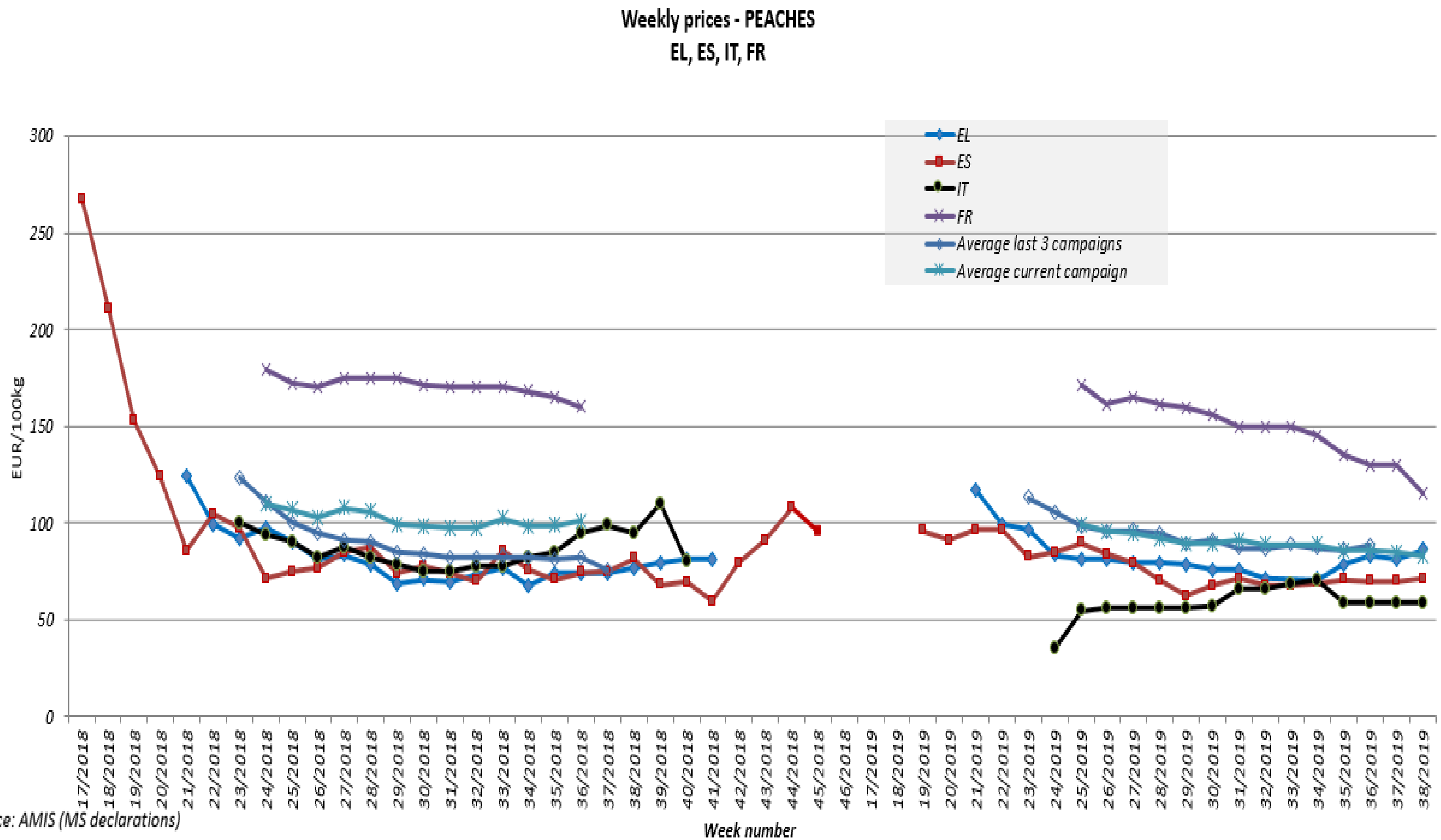

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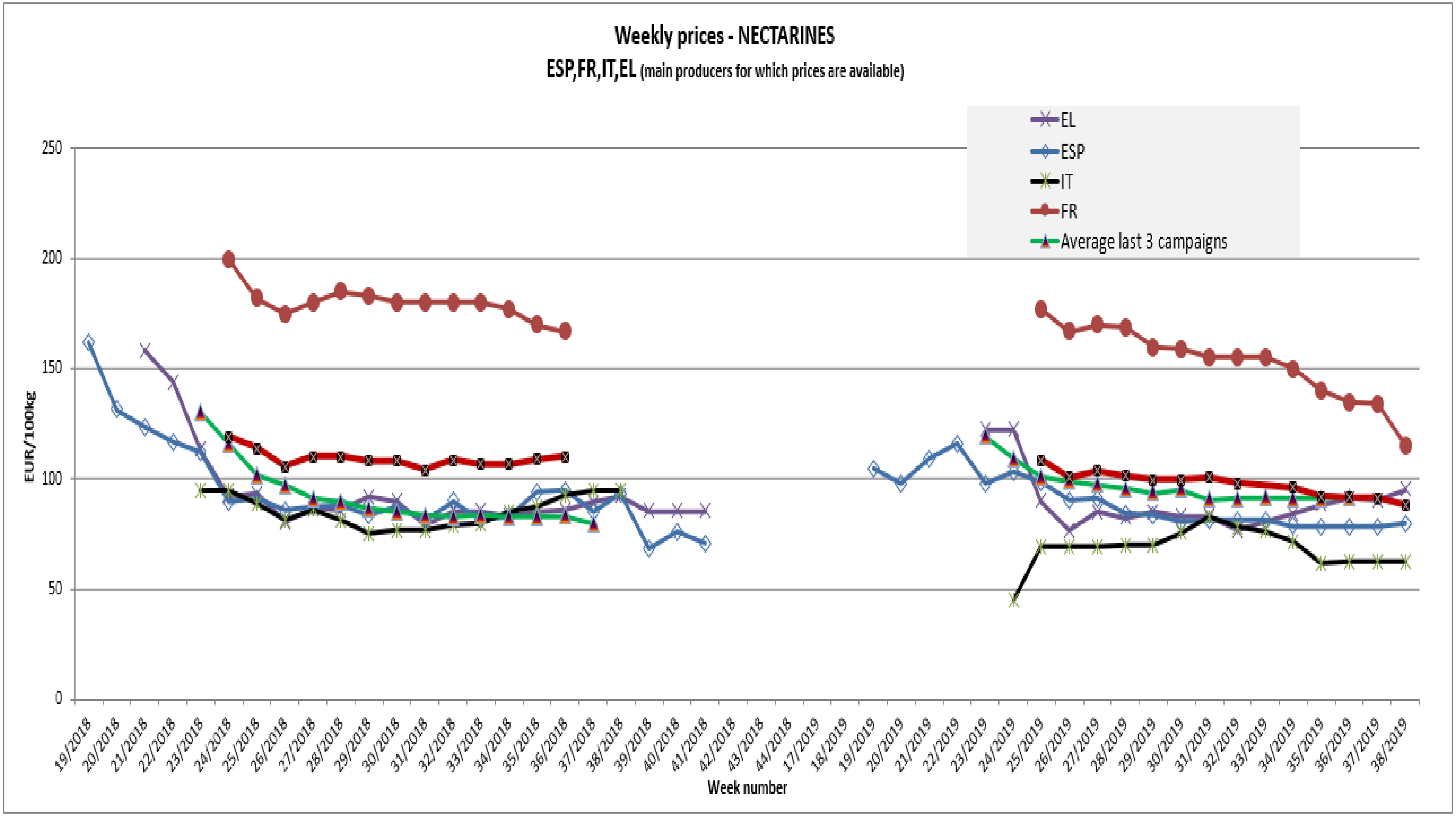
European Commission



Thank you for your attention!

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