

Outlook 2018/2019 apples & pears season

Philippe Binard

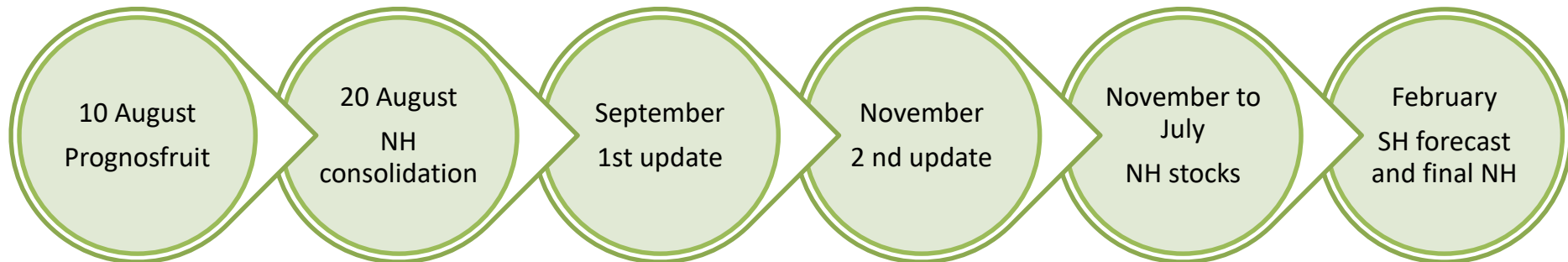




8-10 AUGUST 2018, WARSAW – POLAND
www.prognosfruit.eu



- Year round cooperation among leading apples and pears countries
- Partnership in Europe with 21 MS
- Partnership with several third countries (USA, China, Ukraine, Turkey, Serbia, Switzerland...)
- Southern Hemisphere (5 countries)



Apple outlook 2018



Background to the 2018/2019 season



Market

- Building on low crop due to frost
- Empty stocks
- Average plus SH import, but some late arrival

Climatic conditions

- Ideal climatic condition up to June across EU
- Drought in summer with some impact –sunburn and colouring issue
- Warm conditions in September not favourable for consumption
- Unprecedented frost in China

International environment

- Ongoing Russian embargo and removal of EU exceptional scheme
- USA trade policy (section 230 and 301)
- Slow progress on EU market access opening in new markets

Prognosfruit updated forecast



AUGUST

SEPTEMBER

NOVEMBER

PROGNOS

21

EU

28

12.611.000 T
12.691.000 T

13.112.000 T
13.192.000 T

12.564.000 T
12.644.000 T

2018	13.112.000	
YAGO	9.251.000	142%
AVY 3Y	12.241.000	107%
AVY 3Y EXCL 2017	11.139.000	118%
AVY 5Y	11.381.000	115%
AVY10Y	10.989.000	119%

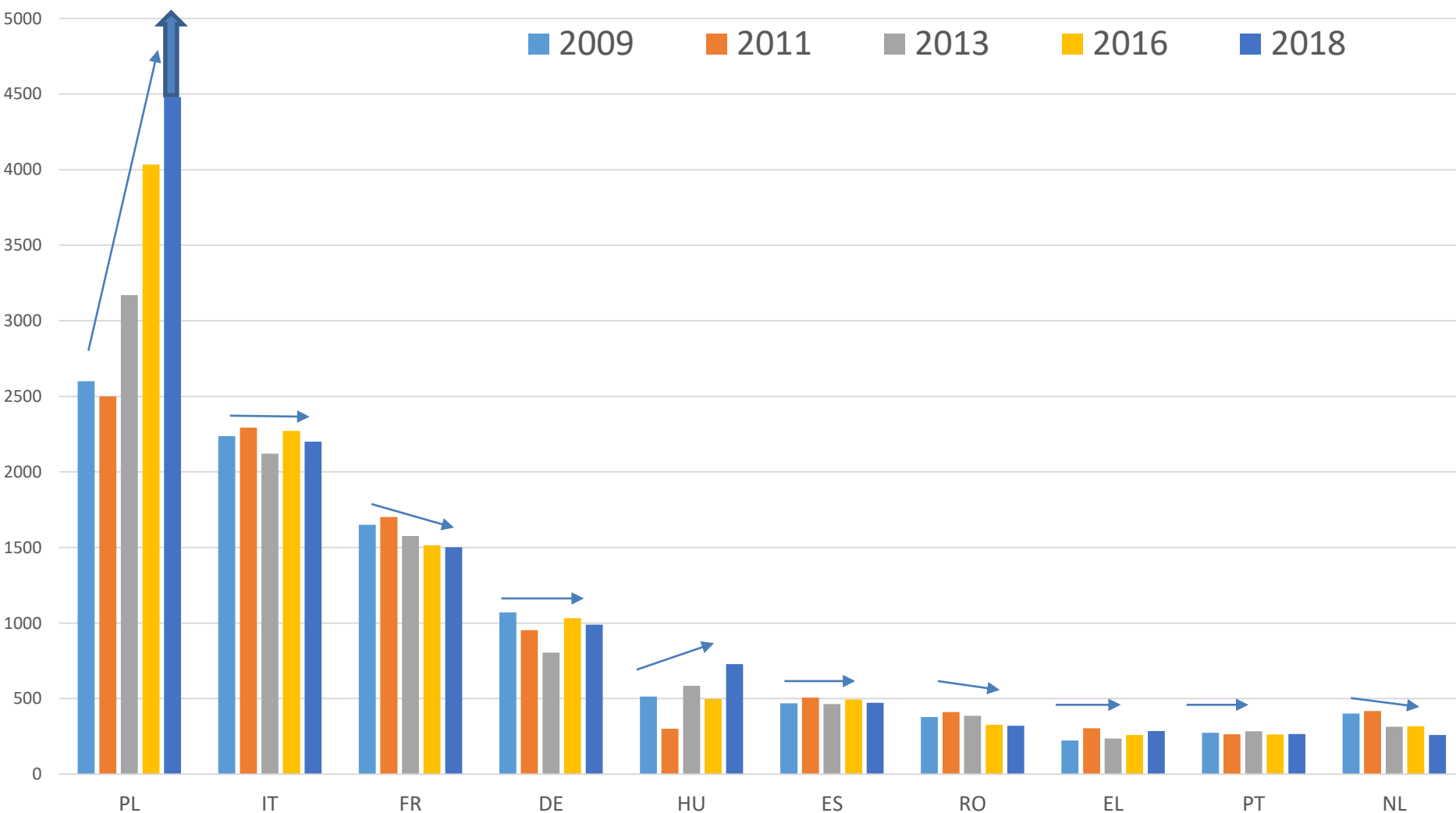
EU orchard potential is at 13 Mio T



x 1000 tons

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	F2018	(1)	(2)
Austria	185	169	199	157	155	188	177	40	67	184	175	94
Belgium	344	288	305	220	220	318	285	234	88	274	211	35
Croatia	60	89	83	59	96	62	101	35	66	108	64	60
Czech Rep	145	103	79	118	121	131	156	139	102	128	25	-3
Denmark	24	21	20	18	23	26	24	24	19	24	26	7
France	1.651	1.579	1.701	1.169	1.576	1.444	1.674	1.515	1.424	1.477	4	-4
Germany	1.071	835	953	972	804	1.116	973	1.033	597	934	56	8
Greece	224	254	305	242	236	245	242	259	231	286	24	17
Hungary	514	488	301	750	585	920	522	498	530	782	48	51
Italy	2.237	2.179	2.293	1.939	2.122	2.456	2.280	2.272	1.704	2.237	31	7
Latvia	13	12	8	9	15	10	8	10	8	6	-25	-31
Lithuania	74	46	49	39	40	27	46	50	48	54	13	13
Netherlands	402	334	418	281	314	353	336	317	228	268	18	-9
Poland	2.600	1.850	2.500	2.900	3.170	3.750	3.979	4.035	2.870	4.810	68	33
Portugal	274	251	265	221	284	272	329	263	314	267	-15	-12
Romania	379	423	412	351	387	382	336	327	230	424	84	42
Slovakia	48	32	33	36	42	46	40	17	15	47	213	96
Slovenia	64	66	73	45	56	68	71	12	6	71	1.083	139
Spain	470	486	507	391	464	505	482	495	480	473	-1	-3
Sweden	18	20	17	14	17	16	21	20	18	32	78	63
UK	212	214	226	162	204	223	243	244	206	225	9	-3
Total:	11.008	9.740	10.746	10.095	10.929	12.558	12.326	11.840	9.251	13.112	42	18

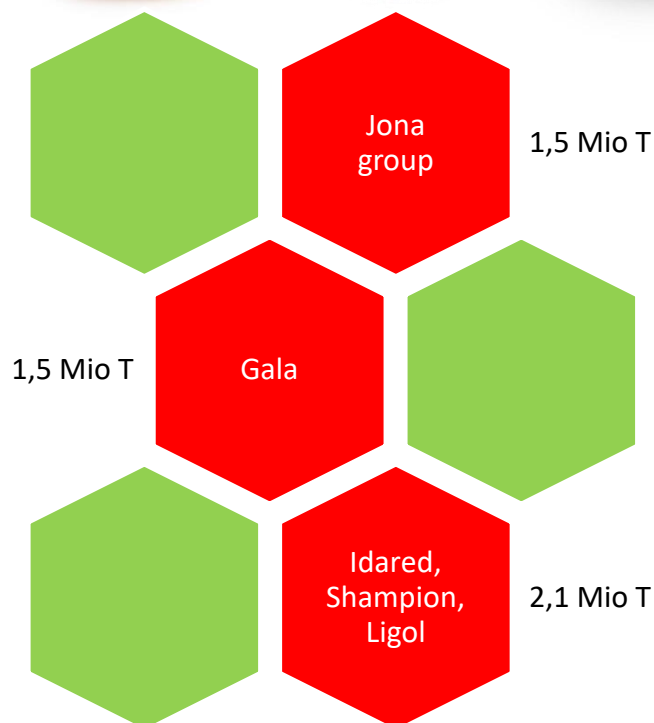
Production trends for the main states



Main varieties trends: top 5 = 50% of assortment



leading varieties: ranking unchanged



Growing club varieties segment (> 400.000 T)



Club varieties (in T)	2016	2017	2018	2020
Pink Lady * 80% of Cripps Pink	172.000	178.000	235.000	285.000
Kanzi	65.000	60.000	65.000	100.000
Jazz	31.850	35.300	38.500	41.000
Junami	20.000	14.000	22.300	25.000
Honey Crunch	15.000	15.000	17.000	20.000
Joya	4.300	6.700	7.000	7.500
Envy	1.620	3.250	6.850	11.000
Greenstar	7.000	4.000	5.000	8.000
Juliet	8.500	8.500	1.000	14.000



slight on-going growth of organic apples 2018/2019



380.000 T , corresponding to 3,5% of the crop

in 000 T	CROP 2016	% ORGANIC	ORGANIC CROP	CROP 2017	% ORGANIC	ORGANIC CROP	CROP 2018	% ORGANIC	ORGANIC CROP
AT	40.000	0,15	6.000	67.000	0,15	10.050	184.000	0,15	27.600
DE	1.033.000	0,07	72.310	597.000	0,08	47.760	990.000	0,09	89.100
FR	1.515.000	0,05	75.750	1.424.000	0,05	71.200	1.502.000	0,05	75.100
RO	327.000	0,05	16.350	230.000	0,05	11.500	320.000	0,05	16.000
IT	2.272.000	0,04	90.880	1.704.000	0,04	68.160	2.200.000	0,04	88.000
NL	317.000	0,04	12.680	228.000	0,06	13.680	259.000	0,06	15.540
UK	183.000	0,04	7.320	206.000	0,04	8.240	220.000	0,04	8.800
SLO	12.000	0,03	360	6.000	0,02	120	65.000	0,02	1.300
BE	234.000	0,02	4.680	88.000	0,022	1.936	217.000	0,025	5.425
CZ	139.000	0,02	2.780	102.000	0,02	2.040	150.000	0,02	3.000
EL	259.000	0,01	2.590	231.000	0,02	4.620	286.000	0,02	5.720
PL	4.035.000	0,01	40.350	2.870.000	0,01	28.700	4.480.000	0,01	44.800
HR	35.000	0,01	350	66.000	0,02	1.320	108.000	0,02	2.160
TOTAL	10.401.000	0,032	332.400	7.819.000	0,034	269.326	10.983.018	0,035	382.545

EU 28 -Est. 440.000 T

Apples processing 2018/2019: back with volume



Country	2015	2016	2017	2018	VAR YAGO
PL	2.188	2.018	1.148	2.640	95%
HU	355	324	371	473	28%
FR	301	258	356	270	-24%
DE	263	258	137	248	80%
IT	228	273	307	264	-14%
RO	91	88	69	86	25%
UK	78	64	48	77	61%
BE	108	94	26	87	229%
EL	48	52	69	57	-17%
CZ	78	56	68	60	-11%
NL	34	32	23	26	14%
HR	30	4	13	11	-18%
LT	7	15	14	19	31%
SLO	11	2	3	13	333%
TOTAL	3.820	3.536	2.652	4.331	48%

Volume for apples processing in selected countries :

Ratio 2018: 64% fresh & processing 36%

(covering > 90% EU crop and estimated for the other non reporting)

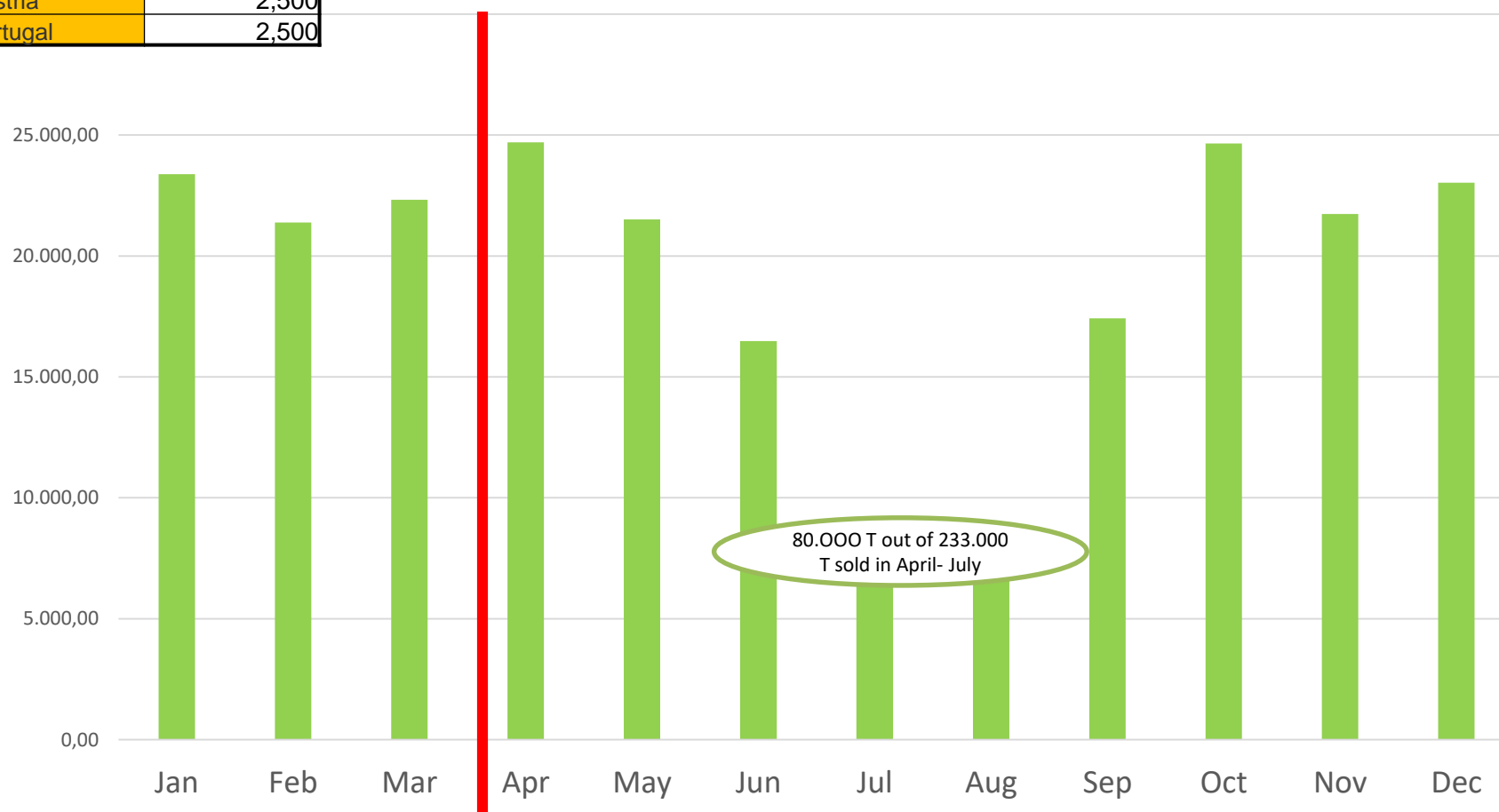
SUPPLY BALANCE	2015	2016	2017	2018
PRODUCTION	11.244	10.970	8.364	11.899
PROCESSING	3.820	3.536	2.652	4.331
FRESH	7.424	7.434	5.712	7.663
RATIO FRESH	66%	68%	68%	64%
RATIO PROCESSING	34%	32%	32%	36%

Total in T	233,000
France	128,500
Italy	28,000
Germany	19,000
Spain	16,000
Netherlands	13,000
Belgium	12,000
Ireland	6,000
Poland	4,000
Austria	2,500
Portugal	2,500

Apples and Brexit : impact???



29 March 2019

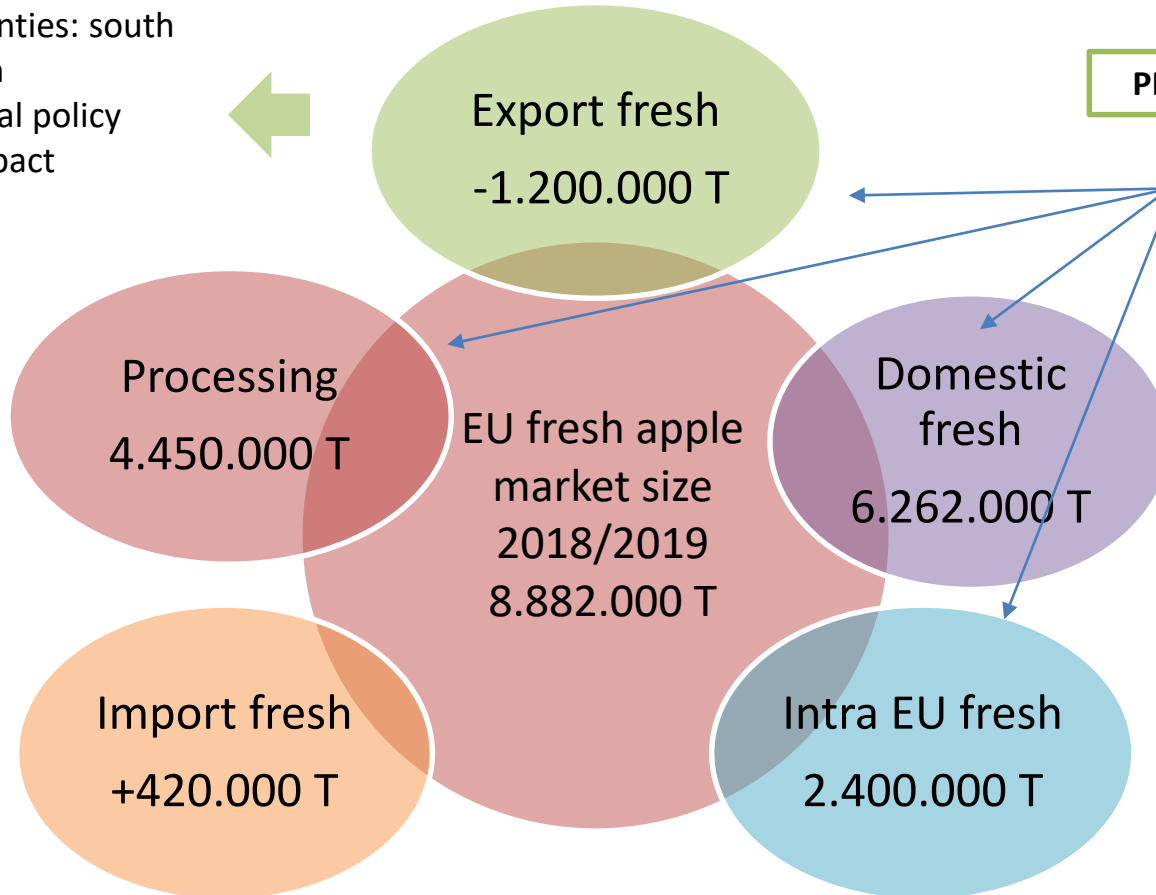


Utilization outlook season 2018/2019



Export outlook subject to:

- Russia and Algeria: embargo
- Trade uncertainties: south mediterranean
- US international policy
- China frost impact



PRODUCTION 13.173.000 T

Elsewhere in the Northern Hemisphere

EU neighbourhood

Turkey: 2,5 Mio T (+3%), Serbia 430.000 T (+8%)
Ukraine: 1,1 Mio T (+10%), Russia 1,3 mio T (+18%)
Macedonia: 120.000 T (+20%), CH 168.000 T (+74%)

North America:

USA: 4,8 Mio T(=), Canada: 341.000T (14%)
Mexico: 325.000 T (-30%)



2018 Crop Forecast: 32,060,000 MT: -28% reduction from 2017



South Eastern Ganzu , 24/7/2018



Potycz Poland , 12/8/2018



2018 U.S. Apple Association Production (000 42-lb. units)

States	USDA Final 2017	2018 USDA Forecast	5-Year Average	USDA Forecast % change from 2017 5-Yr Avg.		USApple 2018 Forecast
New York	30,952	30,952	31,000	+0%	-0%	31,000
Pennsylvania	12,571	12,000	11,867	-5%	+1%	12,000
Virginia	5,357	5,238	4,763	-2%	+10%	5,150
North Carolina	2,381	2,738	2,805	+15%	-2%	2,300
West Virginia	2,429	2,619	2,206	+8%	+19%	2,500
New Jersey	1,000	1,171	878	+17%	+33%	1,171
Maryland	1,024	943	956	-8%	-1%	1,000
Vermont	595	479	721	-20%	-34%	479
Maine	1,036	1,143	860	+10%	+33%	1,140
Massachusetts	929	1,033	942	+11%	+10%	1,022
Connecticut	702	390	545	-44%	-28%	632
Total East¹	58,976	58,707	57,543	-0%	+2%	58,394
Michigan	20,000	27,976	25,690	+40%	+9%	28,000
Ohio	1,119	1,071	1,090	-4%	-2%	1,230
Wisconsin	1,167	1,229	1,160	+5%	+6%	1,229
Illinois	533	562	470	+5%	+20%	562
Minnesota	548	531	569	-3%	-7%	580
Total Midwest¹	23,367	31,369	28,979	+34%	+8%	31,601
Tot East and Midwest¹	82,343	90,076	86,522	+9%	+4%	89,995
Washington	178,571	171,429	163,333	-4%	+5%	155,000
California	5,357	6,190	5,671	+16%	+9%	6,190
Oregon	4,171	3,690	3,771	-12%	-2%	3,690
Idaho	1,129	1,286	1,346	+14%	-4%	1,286
Total West	189,229	182,595	174,122	-4%	+5%	166,167
Total U.S.¹	271,571	272,671	260,644	+0%	+5%	256,162

Elsewhere in the Southern Hemisphere



x 1000 tons

Country	2010	2011	2012	2013	2014	2015	2016	2017	F2018	(1)	(2)
Argentina	800	1.048	853	930	890	834	711	794	635	-20	-19
Australia	255	260	293	289	275	309	301	306	301	-2	-1
Brazil	1.226	1.250	1.184	1.063	1.165	1.145	826	1.329	1.185	-11	8
Chile	1.755	1.784	1.806	1.746	1.670	1.708	1.635	1.675	1.758	5	5
New Zealand	448	513	476	550	478	554	539	506	564	11	6
South Africa	775	768	813	907	794	863	960	940	871	-7	-5
Total	5.259	5.623	5.425	5.485	5.272	5.413	4.972	5.550	5.314	-4	0

(1) Percentage difference between F2018 and 2017

(2) Percentage difference between F2018 and the average of 2015-2016-2017

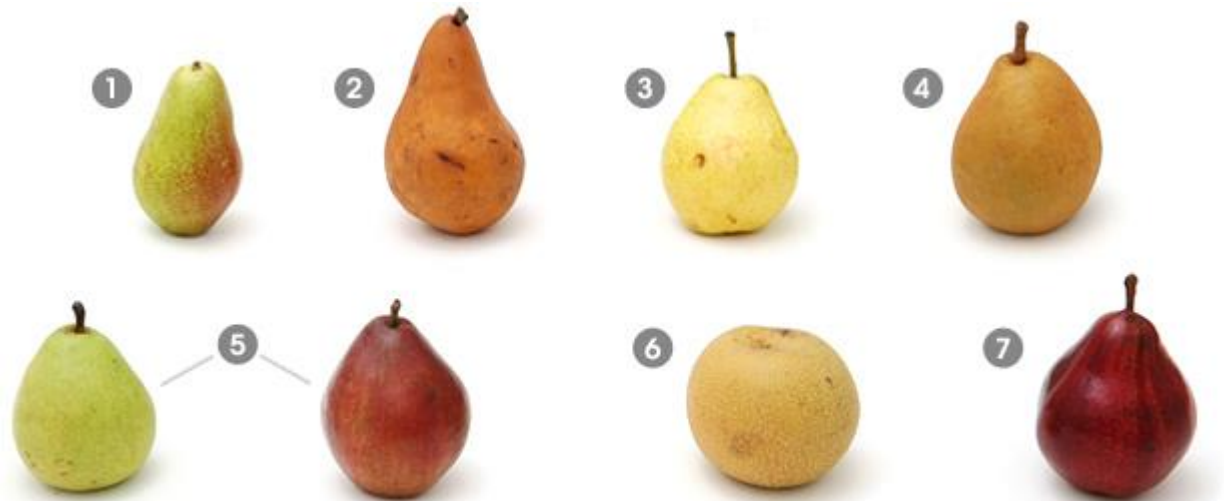
SH export to EU (to 20 Nov) in t	2018	2017
Argentina	24.317	17.778
Brazil	29.184	27.724
South Africa	108.134	90.467
Australia	1.069	1.119
New Zealand	142.177	120.347
Chile	188.147	122.810
Uruguay	7.715	8.937
Total SH	500.743	389.182

Stocks, 1st November, highest ever



Apple Stocks (Ton)	01-11-18	01-11-17	01-11-16
Austria (Steiermark)	122.767	69.238	33.800
Belgium	224.578	51.650	160.497
Czech Republic	68.235	45.077	47.197
Denmark	17.452	0	16.303
France	772.363	697.521	747.288
Germany	450.601	260.612	443.948
Italy	1.800.000	1.186.711	1.665.991
Poland	2.090.000	1.225.000	1.695.000
Portugal	0	0	0
Spain (Catalonia)	219.751	229.031	256.045
Switzerland	70.776	46.205	61.046
The Netherlands	202.772	167.454	239.733
United Kingdom**	185.000	130.292	180.000
TOTAL	6.224.295	4.108.791	5.546.848

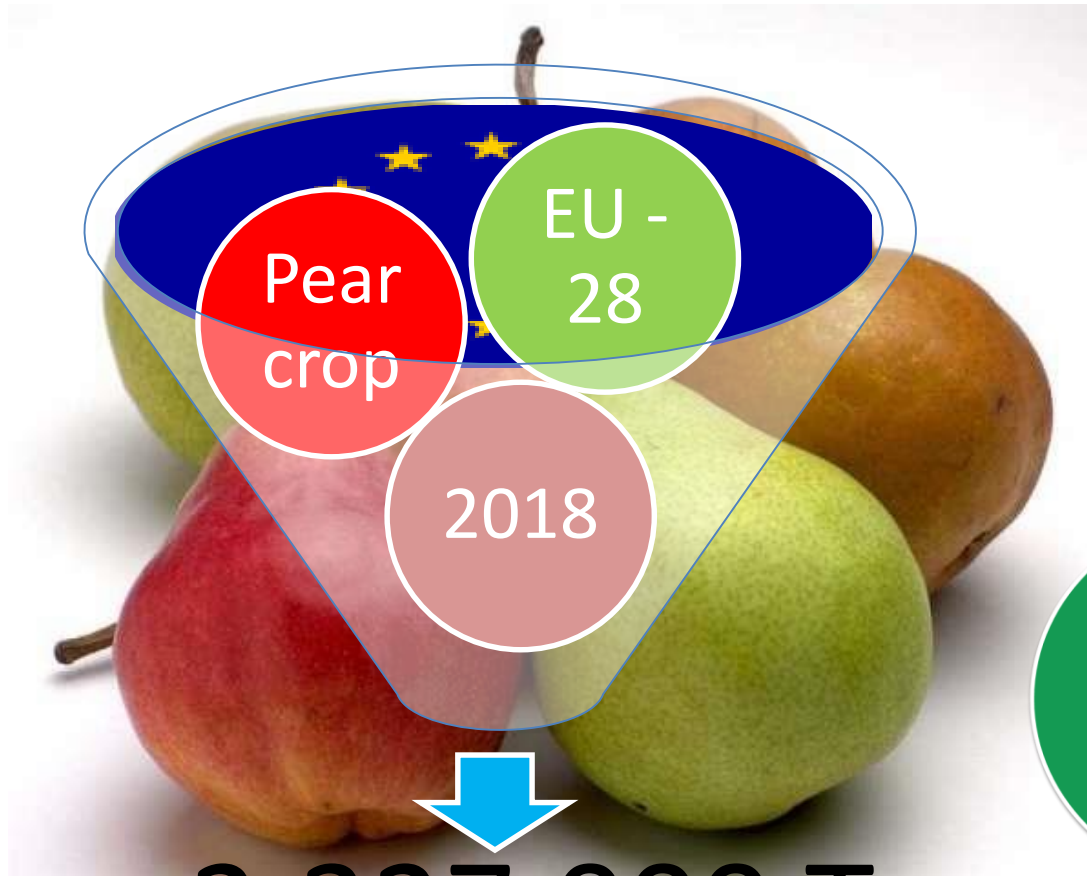
Pears outlook 2018



Pears forecast 2018



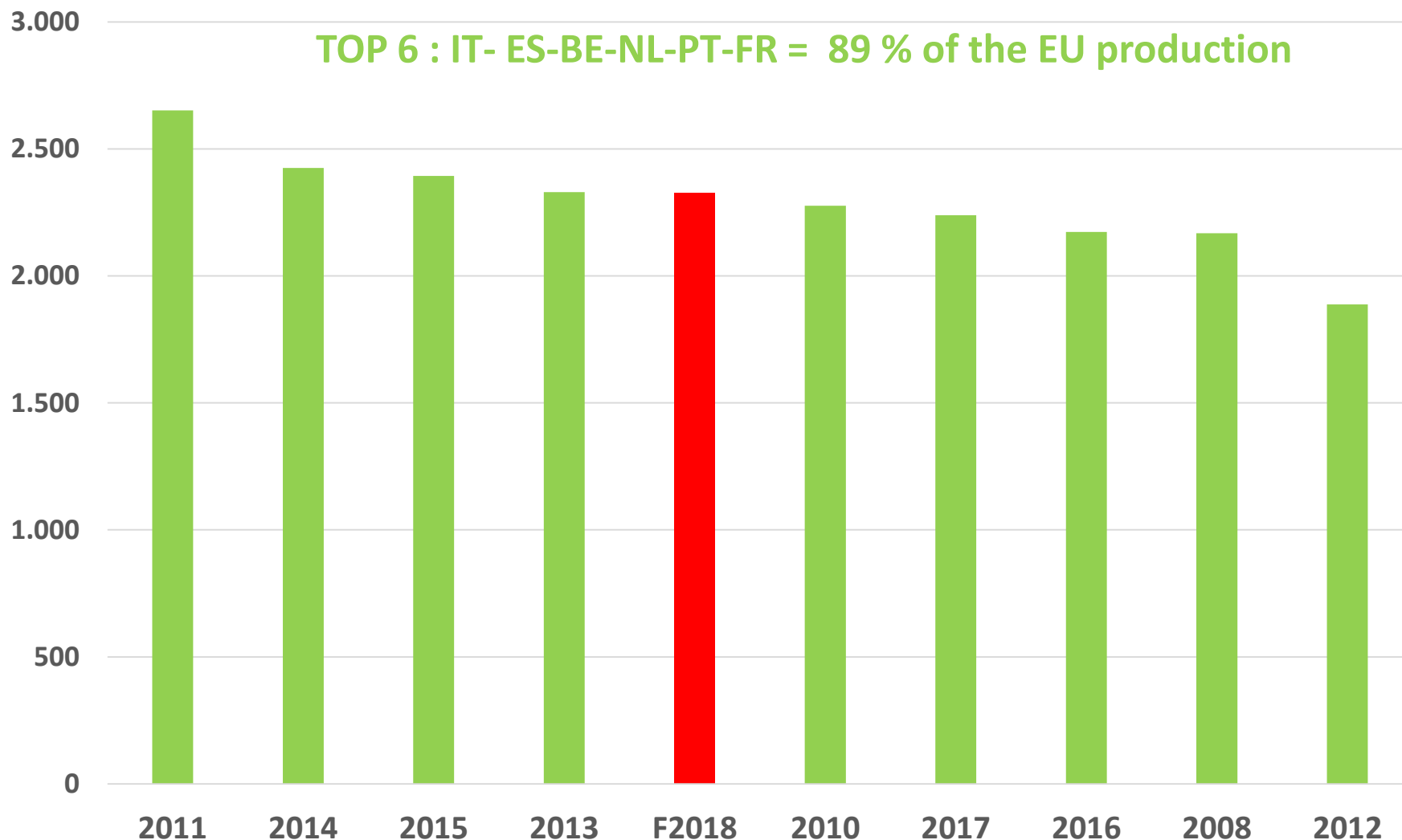
CONTRIBUTIONS
FROM 19 MS



5

PROGNOSFRUIT 2.327.000 T
UPDATE 2.387.000 T

EU-28 crop in perspective

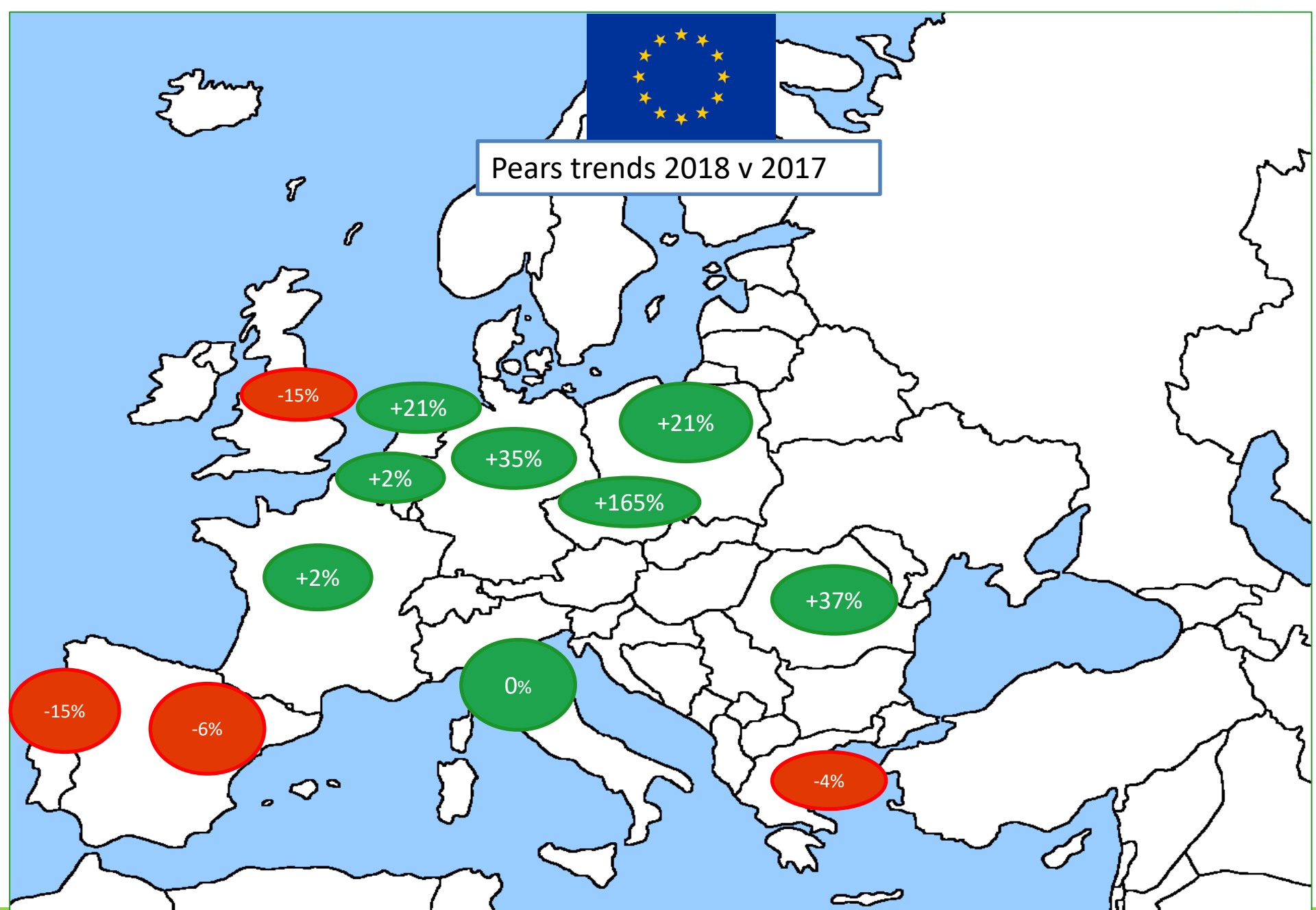


x 1000 tons

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	F2018	(1)	(2)
Belgium	307	285	295	236	315	374	369	322	310	370	▲	19 11
Croatia	5	6	6	2	3	2	2	1	6	7		27 156
Czech Rep	6	3	3	6	7	4	10	7	4	8	▼	102 18
Denmark	7	6	5	5	6	6	6	6	5	6		20 6
France	202	164	176	124	154	131	155	138	133	134		1 -6
Germany	52	39	47	34	34	45	43	35	23	31		35 -8
Greece	43	54	36	42	32	37	60	47	59	57		-4 2
Hungary	40	36	21	25	36	40	33	38	35	38		10 9
Italy	858	680	934	650	726	736	764	681	738	741		0 2
Latvia	0	0	0	0	0	1	0	0	0	0		-30 -28
Netherlands	301	274	336	199	327	349	349	374	330	402	▲	22 15
Poland	90	40	55	45	65	50	80	55	40	70		75 20
Portugal	198	172	210	115	162	203	134	113	186	158		-15 9
Romania	24	20	28	19	24	17	13	16	12	23	▲	85 61
Slovakia	1	1	1	0	1	0	1	0	1	1		52 84
Slovenia	6	6	4	3	3	4	4	1	0	4		1.068 137
Spain	429	456	461	355	403	400	344	311	331	311		-6 -5
Sweden	2	1	2	1	1	1	1	1	1	2		150 150
UK	31	33	32	28	26	25	25	27	25	23	▲	-8 -9
Total:	2.603	2.276	2.652	1.888	2.327	2.426	2.394	2.173	2.239	2.387		7 5



Pears trends 2018 v 2017





2018 crop pears forecast overview by Member State



2.387.000 (19 MS)

+ ca 52.000 T (remaining 5 MS – Eurostat data)

x 1000 tons

<i>Country</i>	<i>2009</i>	<i>2010</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>
Austria	168,66	36,12	73,24	58,18	54,13	50,70	51,11	23,45	46,11
Bulgaria	1,44	1,40	2,00	1,36	2,91	2,15	2,95	1,99	2,84
Cyprus	1,30	1,28	1,15	1,13	1,07	0,76	0,68	0,59	0,55
Luxembourg	0,26	0,26	0,24	0,16	0,23	0,28	0,46	0,54	0,22
Finland	0,00	0,00	0,00	0,00	0,00	0,00	0,20	0,11	0,18

EU-28 : 2.439.000 T

+ Switzerland : 25.987 T

EU 28 variety



x 1000 tons

Variety	2009	2010	2011	2012	2013	2014	2015	2016	2017	F2018	(1)	(2)
Abate F	306	224	404	256	304	358	333	296	328	334	2	5
Blanquilla	86	81	78	59	54	49	44	40	43	41	-4	-2
Conference	903	832	928	693	894	952	967	910	873	995	14	8
Coscia-Ercollini	106	98	80	77	80	66	79	67	79	70	-12	-7
Doyenne du Comice	116	97	107	58	83	94	87	81	59	84	43	11
Durondeau	8	6	7	5	6	6	5	3	2	3	38	-6
Guyot	102	92	96	70	80	67	74	59	65	58	-11	-11
Kaiser	65	42	60	39	54	33	45	38	43	45	6	8
Passacrassana	19	15	17	17	14	11	12	11	9	9	1	-14
Rocha	197	171	209	115	162	203	134	113	186	158	-15	9
William BC	312	286	332	252	283	278	283	261	263	269	2	0
Other	382	331	333	246	315	309	330	293	287	318	11	5
Total:	2.603	2.276	2.652	1.888	2.327	2.426	2.394	2.173	2.239	2.387	7	5



2018 crop forecast – varieties overview



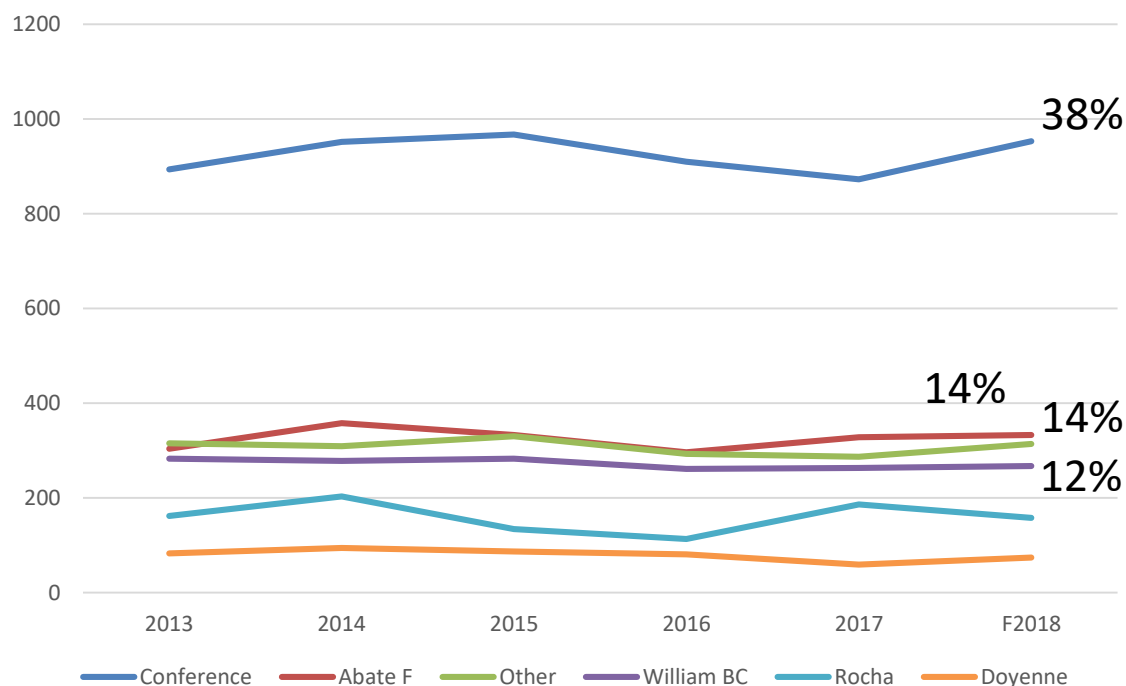
Decline:
Rocha

Increase:
Conference,
Doyenne, other

Consolidation:
Abate, William
BC

	F2018	2017	2016
Conference	995	873	910
Abate F	334	328	296
Other	318	287	293
William BC	269	263	261
Rocha	158	186	113
Doyenne	84	59	81
Coscia	70	79	67
Guyot	58	65	59
Kaiser	45	43	38
Blanquilla	41	43	40
Passacrassana	9	9	11
Durondeau	3	2	3

Conference: largest ever
with 995.000 T



Varieties yearly variation 2018/2017



Conference
+120.000 T



Doyenne
+25.000 T



Abate
+6.000 T



Williams
+6.000 T



Rocha
-28,000 T



Guyot
-7.000 T

Elsewhere in the Northern Hemisphere



	USA Total	Change vs. LY
Bartletts/Williams	315.543	4%
Anjou	202.122	19%
Bosc	77.829	46%
Red Anjou	21.097	6%
Comice	4.869	43%
Seckel	862	11%
Other Reds	8.544	4%
Other Varieties	3.515	24%
<i>Grand Total</i>	634.380	13%

Elsewhere in the Northern Hemisphere



Pears

x 1000 tons

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	F2018 (1)	(2)	
Argentina	895	770	843	801	863	794	810	630	611	428	-30	-37
Australia	127	107	130	124	129	107	104	100	102	116	14	14
Chile	176	170	194	189	200	170	188	177	149	141	-5	-17
New Zealand	12	11	11	9	12	10	12	12	11	12	7	5
South Africa	366	356	360	361	379	399	415	432	436	420	-4	-2
Total	1.577	1.414	1.539	1.485	1.583	1.480	1.528	1.350	1.309	1.117	-15	-20

(1) Percentage difference between F2018 and 2017

(2) Percentage difference between F2018 and the average of 2015 - 2016 - 2017

Export to
the EU

SH pears	2018	2017
Argentina	52.803	47.588
Chile	45.232	58.819
South Africa	73.984	88.121
Total	172.019	194.528

Stocks, 1st November, highest ever

Pear Stocks (Ton)	%2018/2017	01-11-18	01-11-17	01-11-16
Belgium	28,7%	306.238	237.933	269.229
Czech Republic	12,8%	2.925	2.593	1.973
Denmark		1.089	750	456
France	30,8%	20.165	15.417	14.562
Germany	67,4%	7.296	4.358	5.134
Italy	0,6%	370.000	367.675	331.109
Poland	100,0%	50.000	25.000	30.000
Portugal*		100.000	100.000	102.800
Spain (Catalonia)	-10,5%	91.494	102.277	100.335
Switzerland	176,2%	12.093	4.378	8.662
The Netherlands	21,5%	290.515	239.022	269.149
United Kingdom**	13,0%	20.000	17.698	20.000
TOTAL	13,8%	1.271.815	1.117.101	1.153.409

EUFRUIT Network

EUFRUIT Project:

- 4 themes of **sustainable** fruit production:
 - New varieties
 - Reduction of pesticides
 - Improvement of fruit handling/storage
 - Sustainable production/Organic
- All outcomes and research on a publicly available **Knowledge Platform**: <http://kp.eufrin.org/>
- Final meeting in Interpoma: **outreach to end-users** via stand and presentation during the Congress





www.wapa-association.org

www.prognosfruit.eu

www.freshfel.org