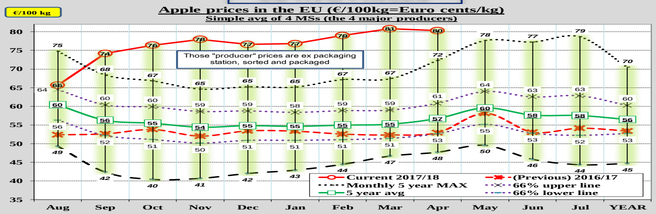
DG AGRI DASHBOARD: APPLES

Last update: 01.05.2018

Prices

EU AVG PRICES

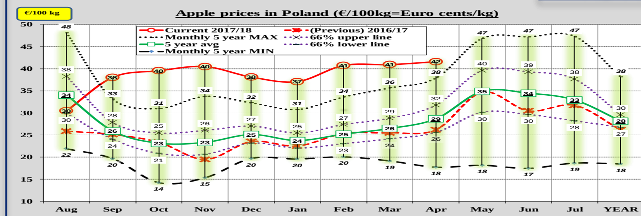


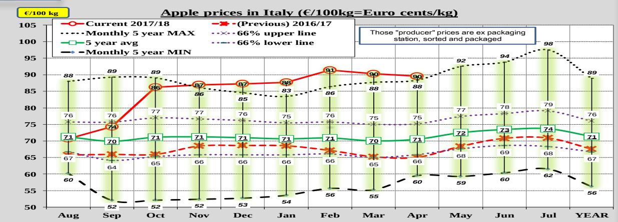
Apple prices €/100kg (= Euro cents/kg) and % changes – March 2018

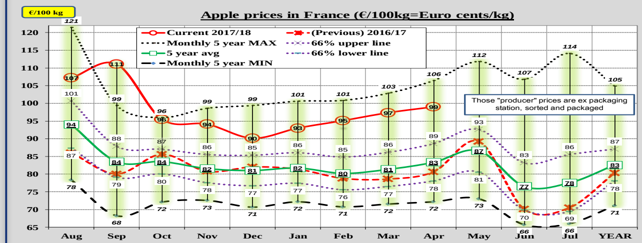
Provisional prices for April in graphs (up to week 15)

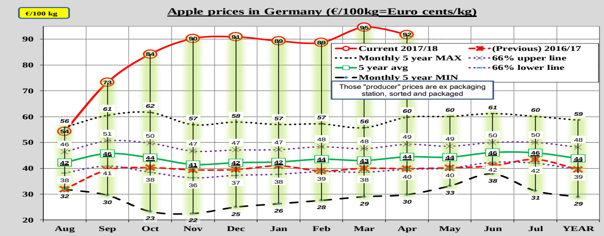
	CURRENT PRICES COMPARED TO 5 YEAR AVERAGE		CURRENT PRICES COMPARED TO ONE MONTH AGO	
	March 2018, Price, €/100 kg	March 2018, comparison to 5 year avg, base = 100 %	5 year avg price, changes from Feb to Mar %	2017/18, changes from Feb to Mar %
EU	81	146	0 %	+2 %
PL-Poland	41	155	+5%	0 %
IT-Italy	90	129	-1 %	-1 %
FR-France	97	120	+1 %	+2 %
DE-Germany	94	220	-1 %	+7 %

MS PRICES

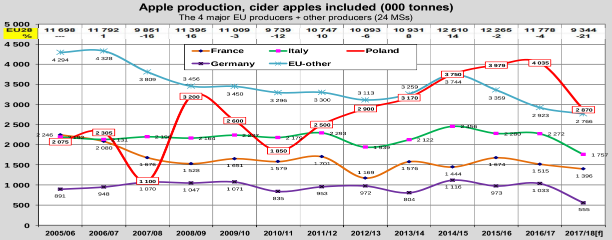


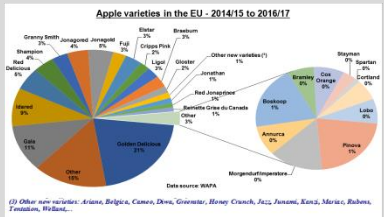




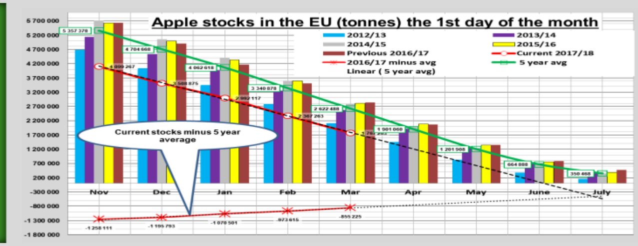


Production

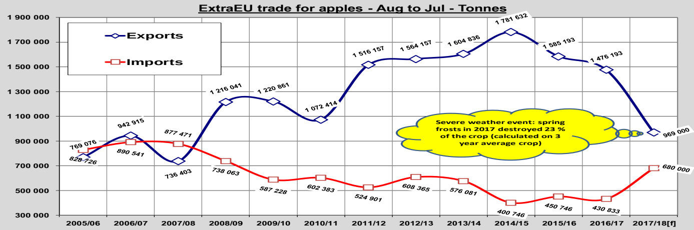


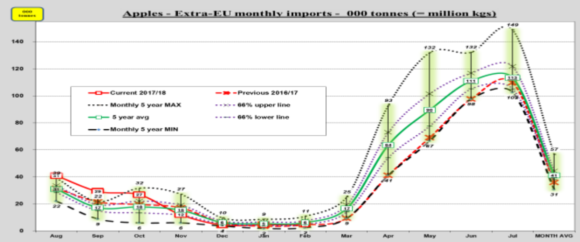


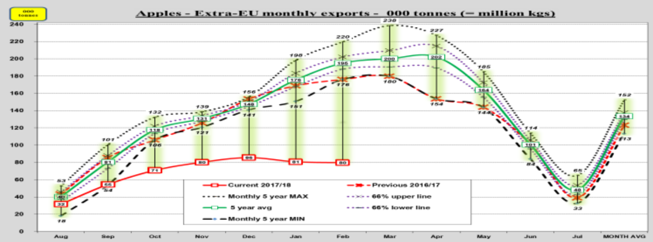
Stocks



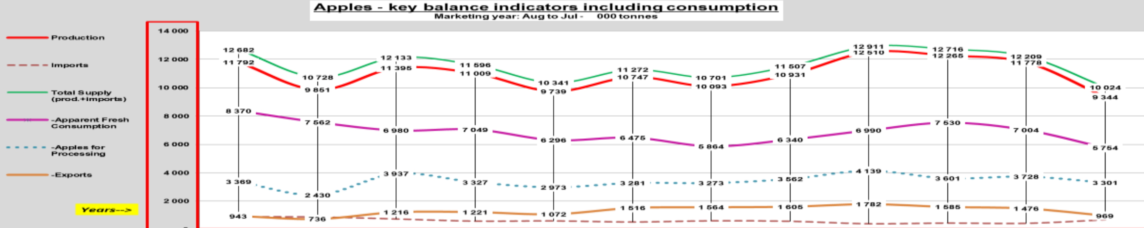
Trade





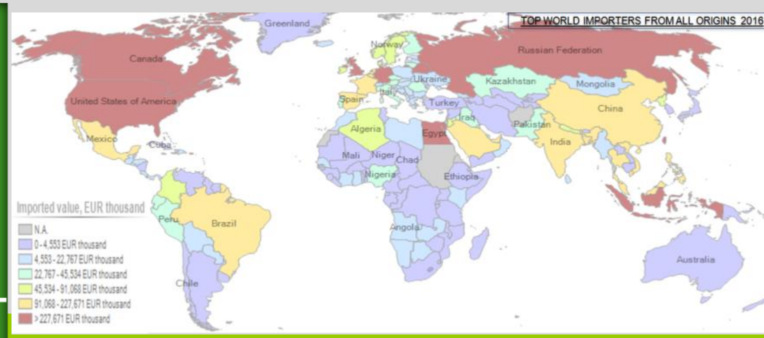


EU Balance



	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17[e]	2017/18[f]
Production	11 792	9 851	11 395	11 009	9 739	10 747	10 093	10 931	12 510	12 265	11 778	9 344
Imports	891	877	738	587	602	525	608	576	401	451	431	680
Total Supply (prod.+imports)	12 682	10 728	12 133	11 596	10 341	11 272	10 701	11 507	12 911	12 716	12 209	10 024
-Apparent Fresh Consumption	8 370	7 562	6 980	7 049	6 296	6 475	5 864	6 340	6 990	7 530	7 004	5 754
-Apples for Processing	3 369	2 430	3 937	3 327	2 973	3 281	3 273	3 562	4 139	3 601	3 728	3 301
-Exports	943	736	1 216	1 221	1 072	1 516	1 564	1 605	1 782	1 585	1 476	969

Export diversification



Sources: Eurostat, MSs notifications, DG Agri, Comext, Comtrade, GTA, ITC, AMI, Expert groups, Freshfel, Wapa....

INDEX

0. Summary overview, market update

1. Prices
   * EU prices
   * MS prices for major producers

2. Production (by variety + extreme weather events + stocks)

3. Trade
   * Evolution of the trade balance
   * Import monitoring
   * Export development

4. Key balance indicators including CONSUMPTION

5. Export diversification

0. SUMMARY OVERVIEW, MARKET UPDATE

RECENT DEVELOPMENTS

1. The EU average price moved from 79 (*) EuroCents/kg in February to 81 (*) in March this year (wich implies evolving from 44% to 46% above the 5 year reference period averages for these two months).

2. All major EU producers have prices above the reference period average. In the case of Poland, the Member State with the highest volume and the lowest price among the 4 major EU producers, prices were 62% above historical levels in February and 55% in March. The same indicator for the remaining major producers changed from February to March as follows: +19% -> +20% in France , +104% -> +120% in Germany and +29% -> +29% in Italy (no change) .

3. In conclusion, price fluctuations when taking into account for seasonal factors in the EU were slightly positive and at MS level as follows: positive in both DE and FR, stability in IT and moderate price reduction in PL.

(*) Minor last minute adjustments on previously disseminated figures are possible due to additional notifications coming from Member States.

BACKGROUND

1. Extreme weather events during April and May 2017, late spring frosts, are at the origin of a relatively small supply level implying high prices during this marketing year. This is the central weather event defining the ongoing marketing year.

2. The EU apple market has essentially two major "leading indicators":

   2.1. The size of the crop for the ongoing marketing year; at EU level a 19% reduction of the current crop (when compared to a 5 year reference period) results on about 40% price increase (with huge differences depending on the relative size of the crop of each MS and the historical reference level of prices); => in the current year the price band is situated well above the historical range for prices; => [PLACEMENT OF THE BAND WHEN COMPARED TO REFERENCE PERIOD AVERAGE PRICES]

   2.2 The depletion or unstocking rate month after month during the marketing year; => that rate and price evolve towards opposite directions; = [MONTHLY ADJUSTMENTS WITHIN THE BAND ABOVE]

3. The depletion or unstocking rate depends on 3 sub-factors:
   3.1 Monthly consumption;
   3.2 Monthly trade balance (the EU apple market is sensitive to extra-EU export developments) ;
   3.2 Small adjustments in terms of product expecting to go to fresh consumption
   but that due to quality issues has to go finally for processing.

4. In conclusion, the current marketing year is caracterized by a significantly smaller than average supply and very high prices.

1. PRICES

1.1. EU Prices

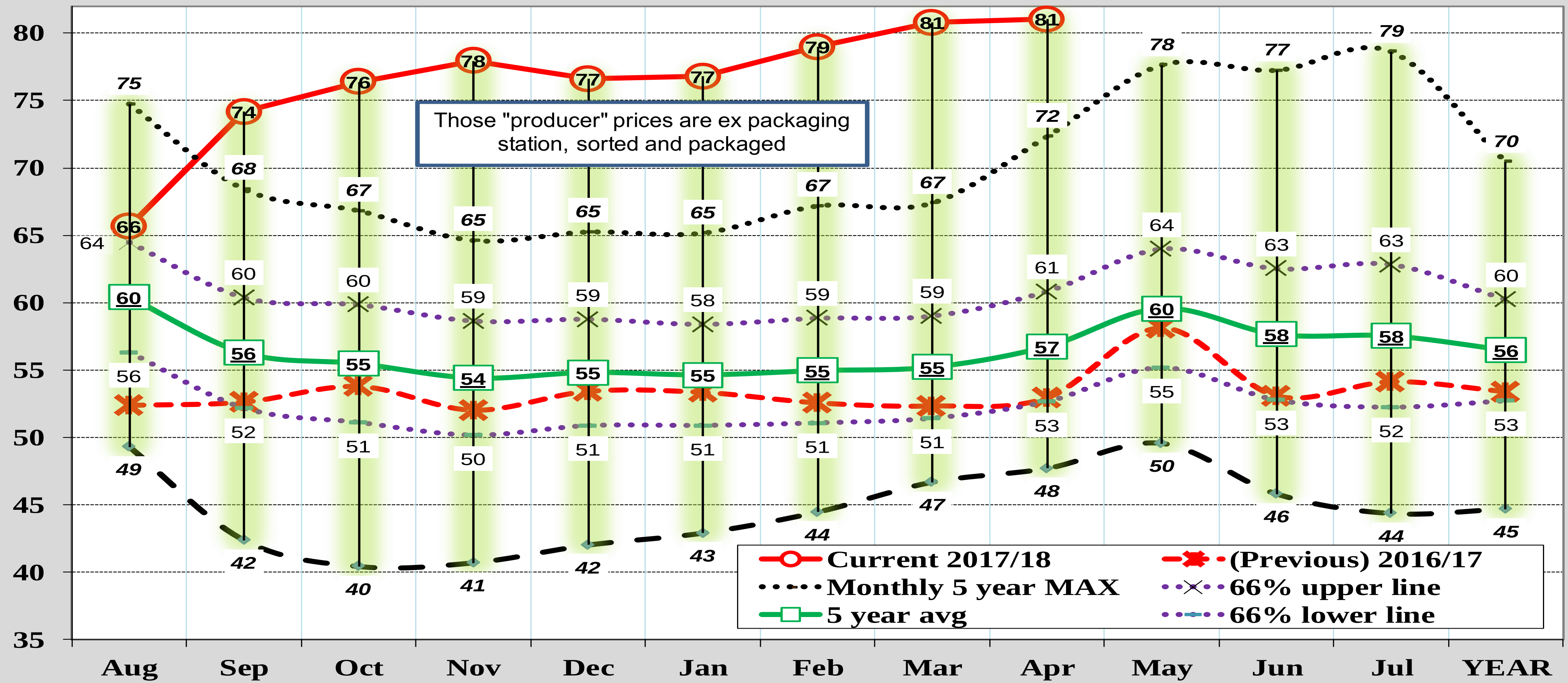
1.2. MS prices for major producers

* Poland (1st EU28 volume producer)
* Italy (2nd)
* France (3rd)
* Germany (4th)

€/100 kg

Apple prices in the EU (€/100kg=Euro cents/kg)

Simple avg of 4 MSs (the 4 major producers)



Agriculture and Rural Development

Market summary

European Commission

Provisional prices for April in graphs (up to week 15)

Apple prices €/100kg (= Euro cents/kg) and % changes – March 2018

	CURRENT PRICES COMPARED TO 5 YEAR AVERAGE		CURRENT PRICES COMPARED TO ONE MONTH AGO	
	March 2018, Price, €/100 kg	March 2018, comparison to 5 year avg, base = 100 %	5 year avg price, changes from Feb to Mar %	2017/18, changes from Feb to Mar %
EU	81	146	0 %	+2 %
PL-Poland	41	155	+5%	0 %
IT-Italy	90	129	-1 %	-1 %
FR-France	97	120	+1 %	+2 %
DE-Germany	94	220	-1 %	+7 %

Apple prices €/100kg (= Euro cents/kg) and % changes – February 2018

	CURRENT PRICES COMPARED TO 5 YEAR AVERAGE		CURRENT PRICES COMPARED TO ONE MONTH AGO	
	February 2018, Price, €/100 kg	Jan. 2018, comparison to 5 year avg, base = 100 %	5 year avg price, changes from Jan to Feb %	2017/18, changes from Jan to Feb %
EU	79	144	+1 %	+3 %
PL-Poland	41	162	+6%	+10 %
IT-Italy	92	129	0 %	+4 %
FR-France	95	119	-2 %	+2 %
DE-Germany	89	204	+3 %	-1 %

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Agriculture and Rural Development

Apple prices €/100kg (= Euro cents/kg) and % changes – January 2018

	CURRENT PRICES COMPARED TO 5 YEAR AVERAGE		CURRENT PRICES COMPARED TO ONE MONTH AGO	
	January 2018, Price, €/100 kg	Jan. 2018, comparison to 5 year avg, base = 100 %	5 year avg price, changes from Dec to Jan %	2017/18, changes from Dec to Jan %
EU	77	140	0 %	0 %
PL-Poland	37	156	-5%	-3 %
IT-Italy	88	124	-1 %	1 %
FR-France	93	114	+1 %	+3 %
DE-Germany	89	210	+1 %	-2 %

Apple prices €/100kg (= Euro cents/kg) and % changes – December 2017

	CURRENT PRICES COMPARED TO 5 YEAR AVERAGE		CURRENT PRICES COMPARED TO ONE MONTH AGO	
	December 2017, Price, €/100 kg	Dec 2017, comparison to 5 year avg, base = 100 %	5 year avg price, changes from Nov to Dec %	2017/18, changes from Nov to Dec %
EU	77	140	+1 %	-2 %
PL-Poland	38	152	+8%	-6 %
IT-Italy	87	123	0 %	0 %
FR-France	90	111	-1 %	-4 %
DE-Germany	91	216	+2 %	+1 %

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European Commission

Apple prices €/100kg (= Euro cents/kg) and % changes – November 2017

	CURRENT PRICES COMPARED TO 5 YEAR AVERAGE		CURRENT PRICES COMPARED TO ONE MONTH AGO	
	November 2017, Price, €/100 kg	Nov 2017, comparison to 5 year avg, base = 100 %	5 year avg price, changes from Oct to Nov %	2017/18, changes from Oct to Nov %
EU	78	143	-2 %	+2 %
PL-Poland	41	173	+1%	+2 %
IT-Italy	87	122	0 %	+1 %
FR-France	94	115	-2 %	-1 %
DE-Germany	90	217	-6 %	+7 %

Apple prices €/100kg (= Euro cents/kg) and % changes – October 2017

	CURRENT PRICES COMPARED TO 5 YEAR AVERAGE		CURRENT PRICES COMPARED TO ONE MONTH AGO	
	October 2017, Price, €/100 kg	Oct. 2017, comparison to 5 year avg, base = 100 %	5 year avg price, changes from Sep to Oct %	2017/18, changes from Sep to Oct %
EU	76	138	-1 %	+3 %
PL-Poland	40	171	-11 %	+4 %
IT-Italy	86	121	+2 %	+16 %
FR-France	96	114	0 %	-14 %
DE-Germany	84	191	-4 %	+5 %

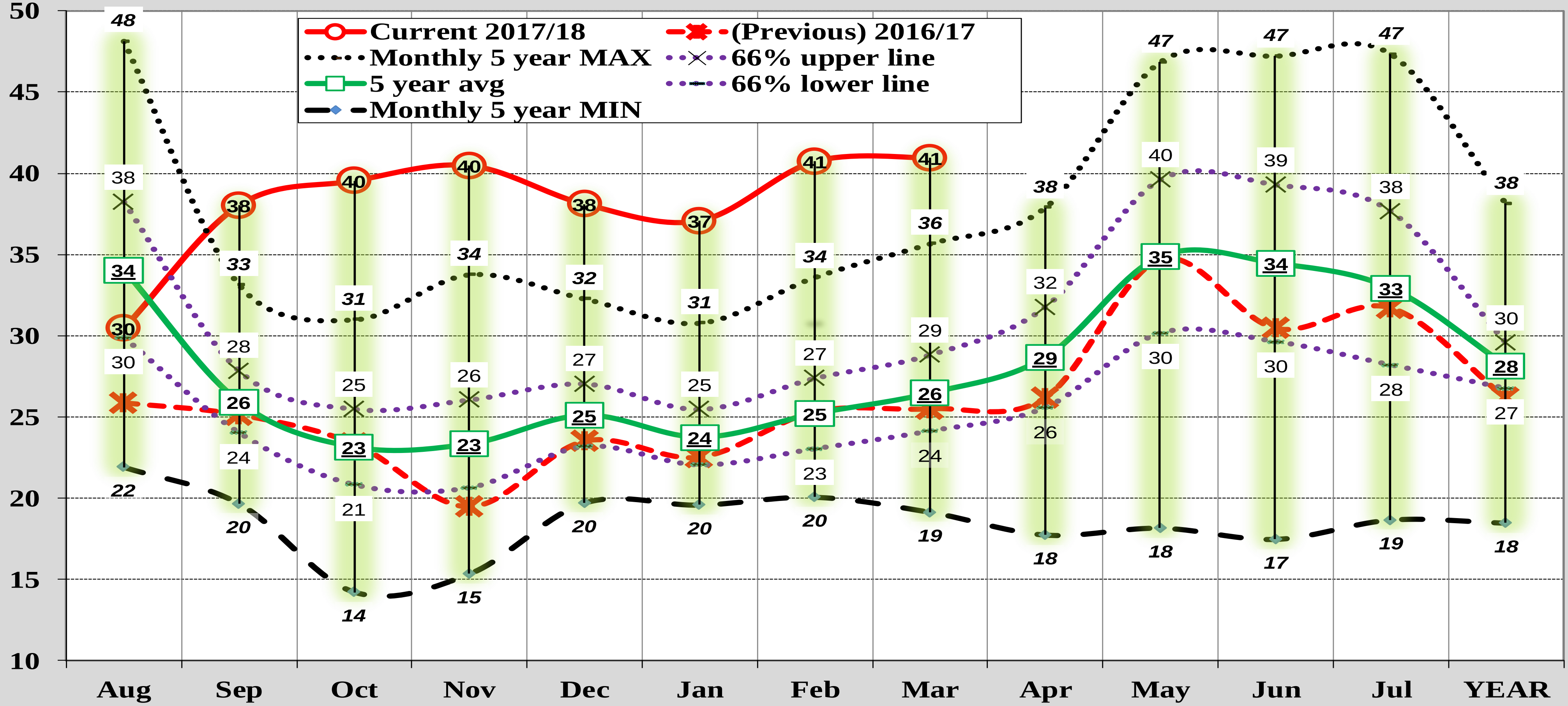
Agriculture and Rural Development

Apple prices €/100kg (= Euro cents/kg) and % changes – September 2017

	CURRENT PRICES COMPARED TO 5 YEAR AVERAGE		CURRENT PRICES COMPARED TO ONE MONTH AGO	
	September 2017, Price, €/100 kg	Sept. 2017, comparison to 5 year avg, base = 100 %	5 year avg price, changes from Aug to Sep %	2017/18, changes from Aug to Sep, %
EU	74	132	-7 %	+13 %
PL-Poland	38	147	-24 %	+25 %
IT-Italy	74	106	-2 %	+5 %
FR-France	111	133	-11 %	+4 %
DE-Germany	73	160	+8 %	+35 %

€/100 kg

Apple prices in Poland (€/100kg=Euro cents/kg)



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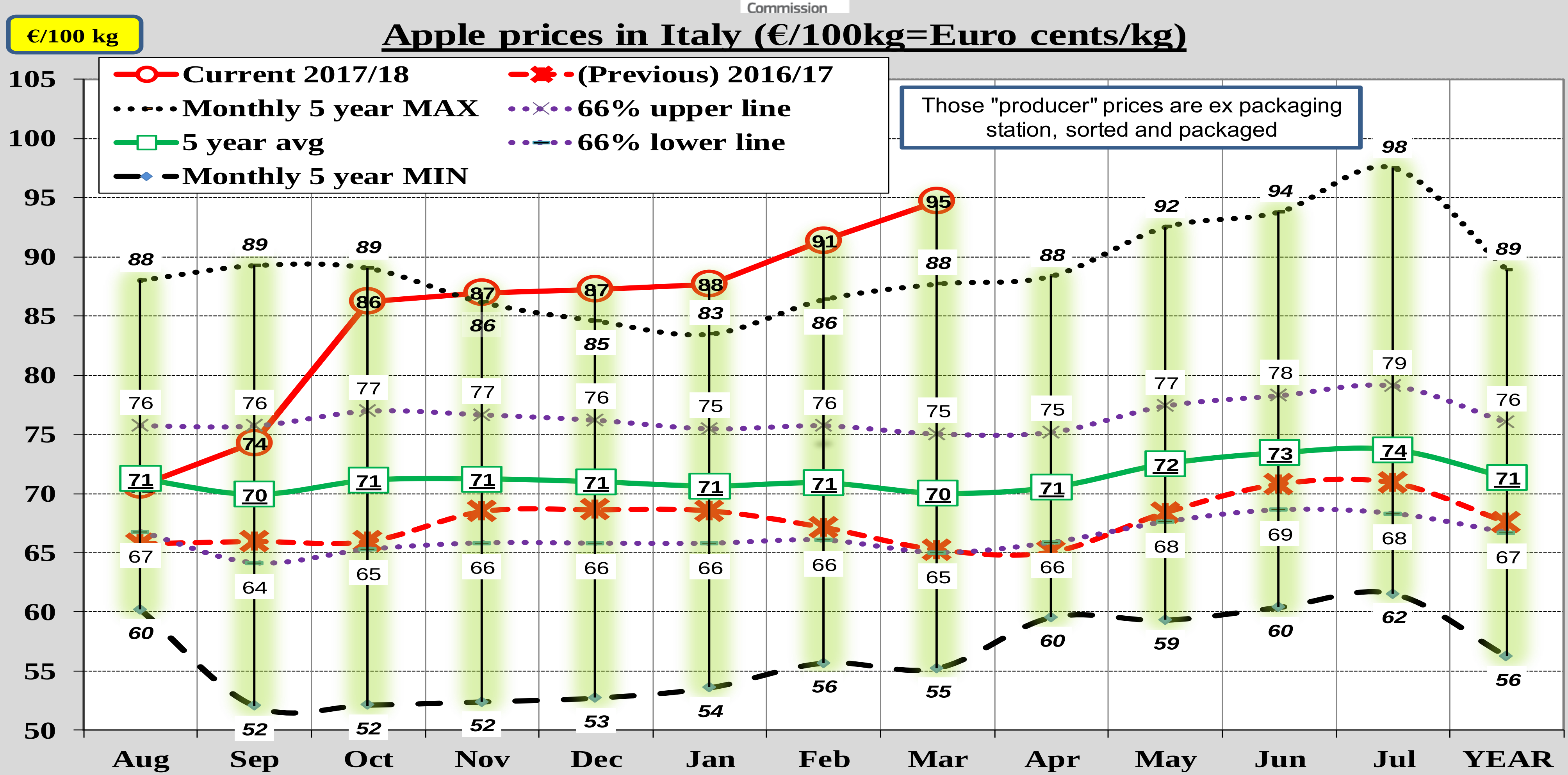
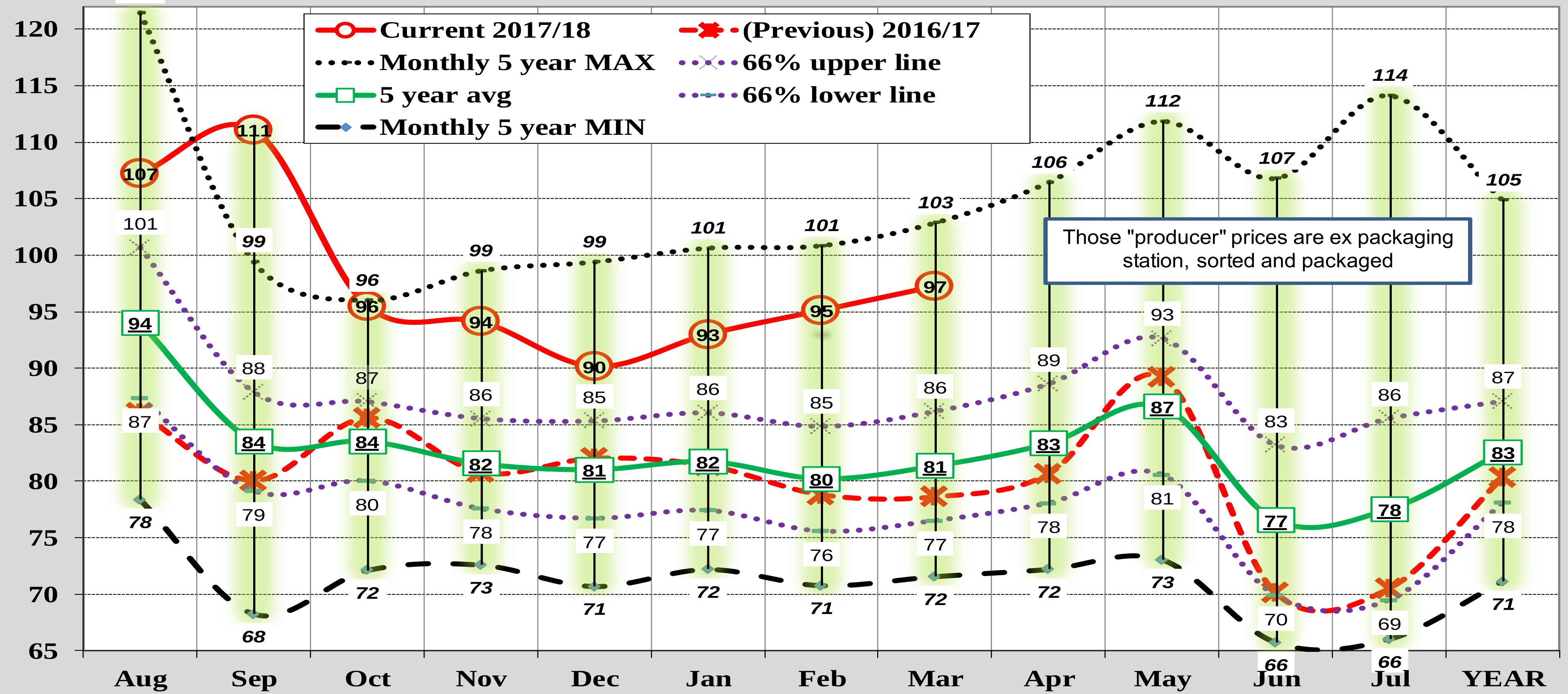
Apple prices in Italy (€/100kg=Euro cents/kg)



Apple prices in France (€/100kg=Euro cents/kg)



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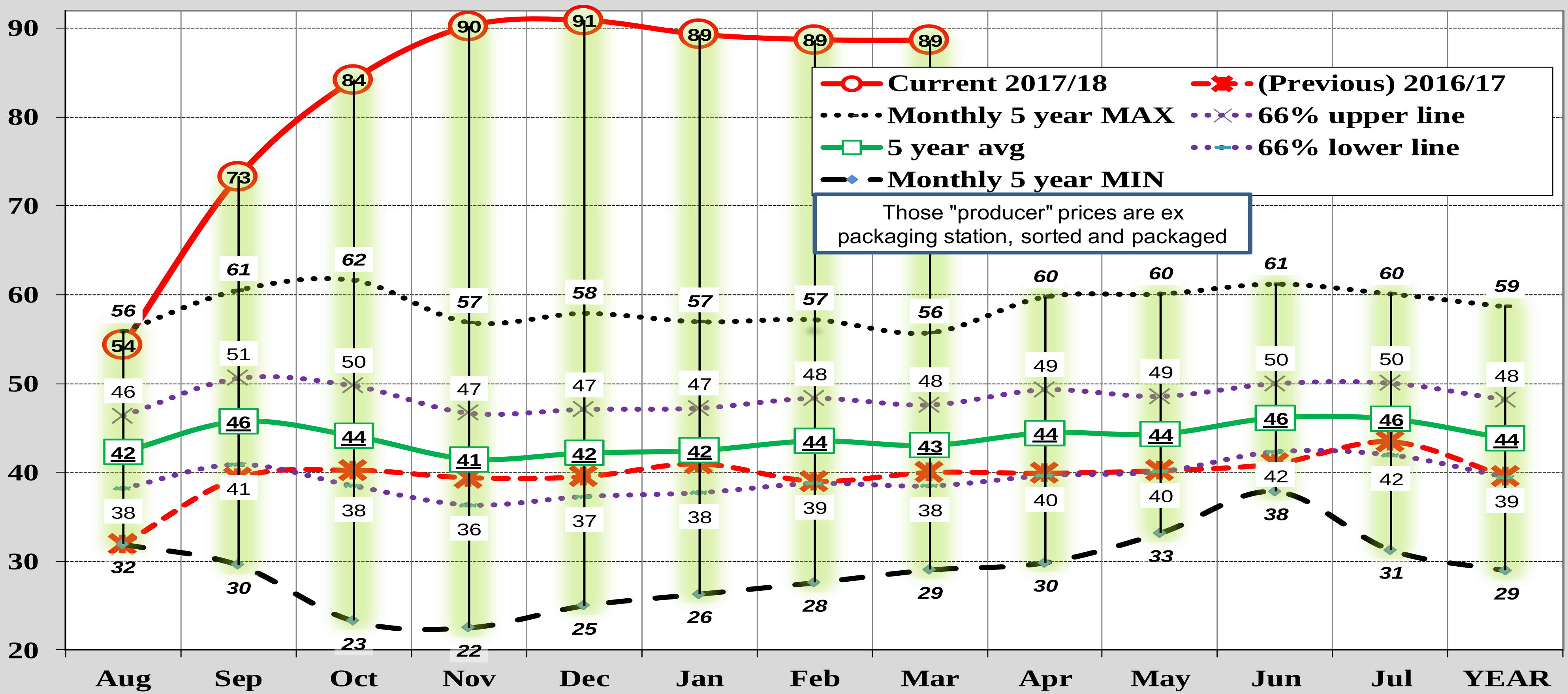
€/100 kg

Apple prices in Germany (€/100kg=Euro cents/kg)



2. PRODUCTION

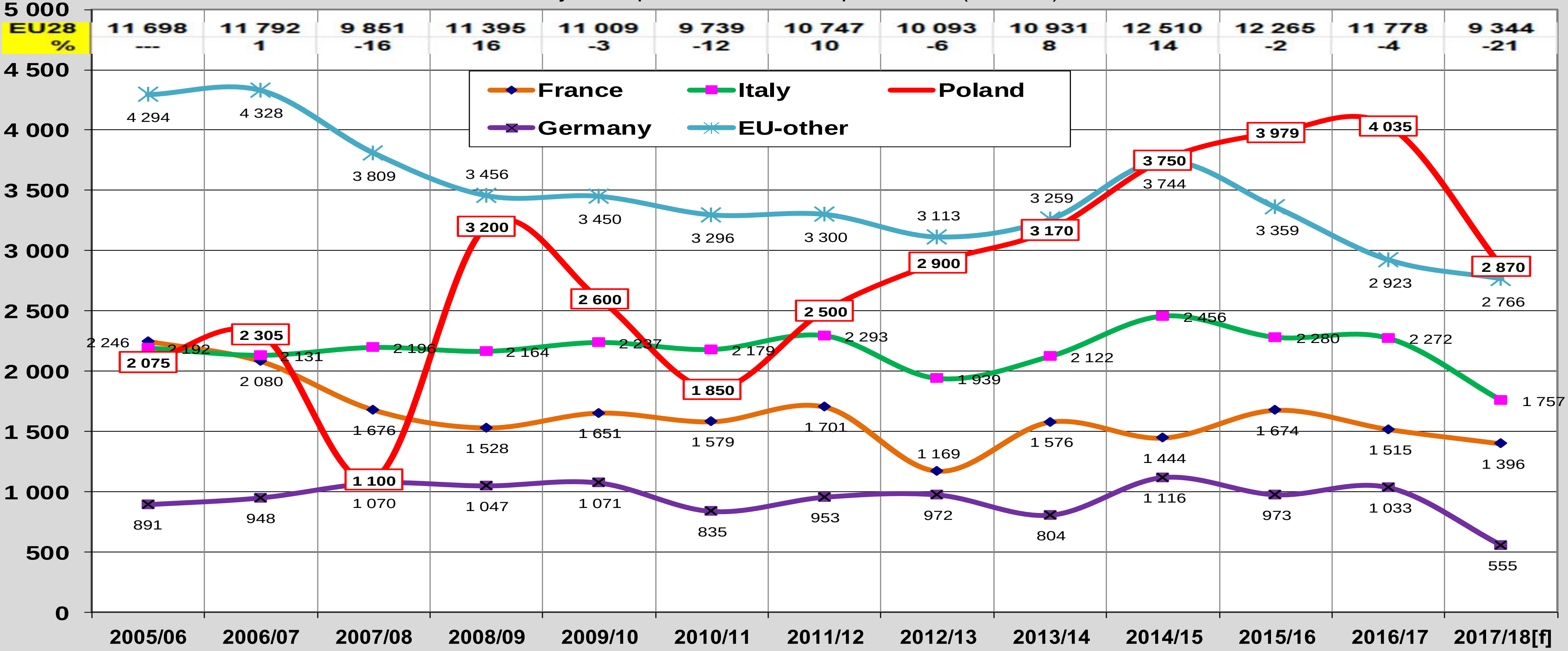
2.1. EU production for MSs that are major producers

2.2. EU production by variety (%)

2.3. Extreme weather events

2.4. Apple stocks

European Commission



EU28	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18[f]
EU28	11 698	11 792	9 851	11 395	11 009	9 739	10 747	10 093	10 931	12 510	12 265	11 778	9 344
%	---	1	-16	16	-3	-12	10	-6	8	14	-2	-4	-21
France	2 246	2 080	1 676	1 528	1 651	1 579	1 701	1 169	1 576	1 444	1 674	1 515	1 396
Italy	2 192	2 131	2 196	2 164	2 237	2 179	2 293	1 939	2 122	2 456	2 280	2 272	1 757
Poland	2 075	2 305	1 100	3 200	2 600	1 850	2 500	2 900	3 170	3 750	3 979	4 035	2 870
Germany	891	948	1 070	1 047	1 071	835	953	972	804	1 116	973	1 033	555
EU-other	4 294	4 328	3 809	3 456	3 450	3 296	3 300	3 113	3 259	3 744	3 359	2 923	2 766

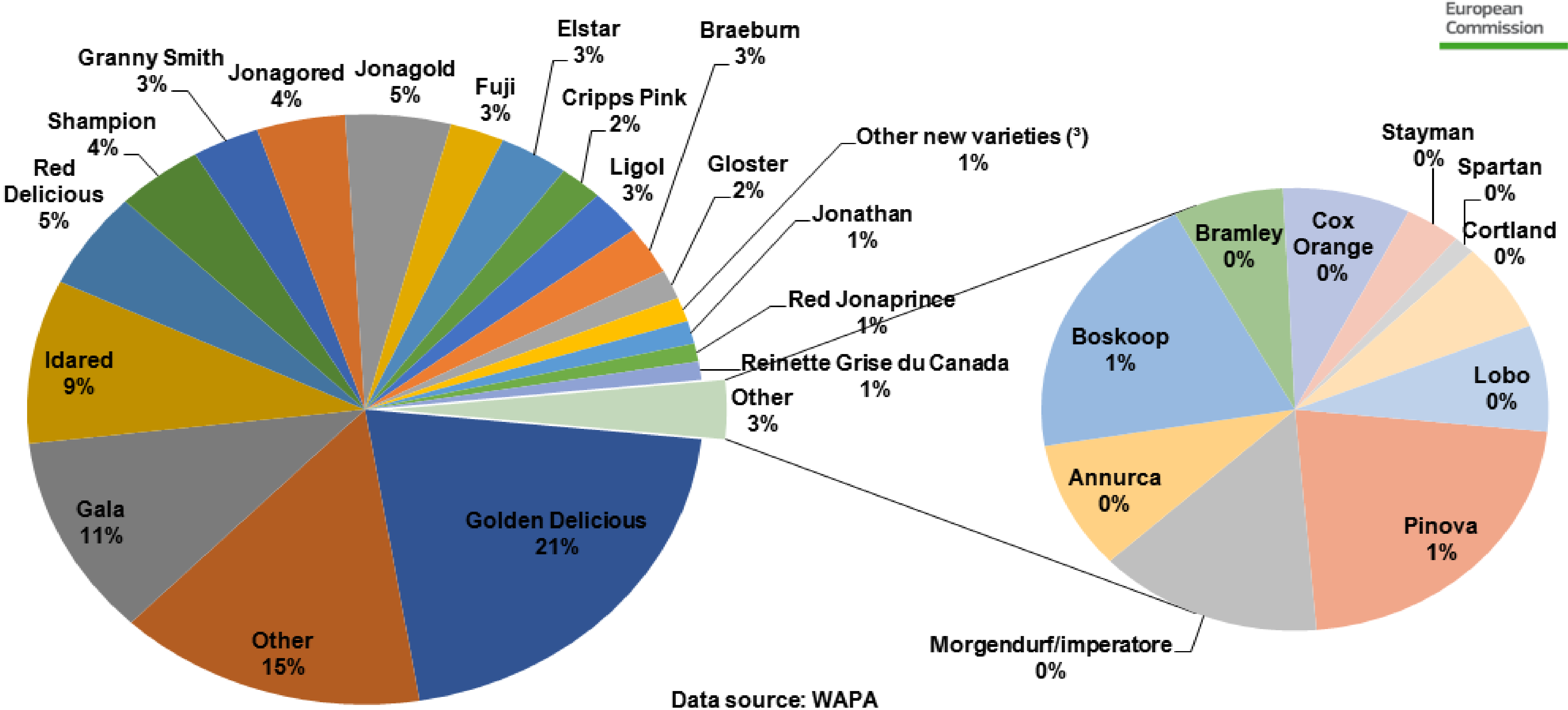
Further detail

Agriculture and Rural Development

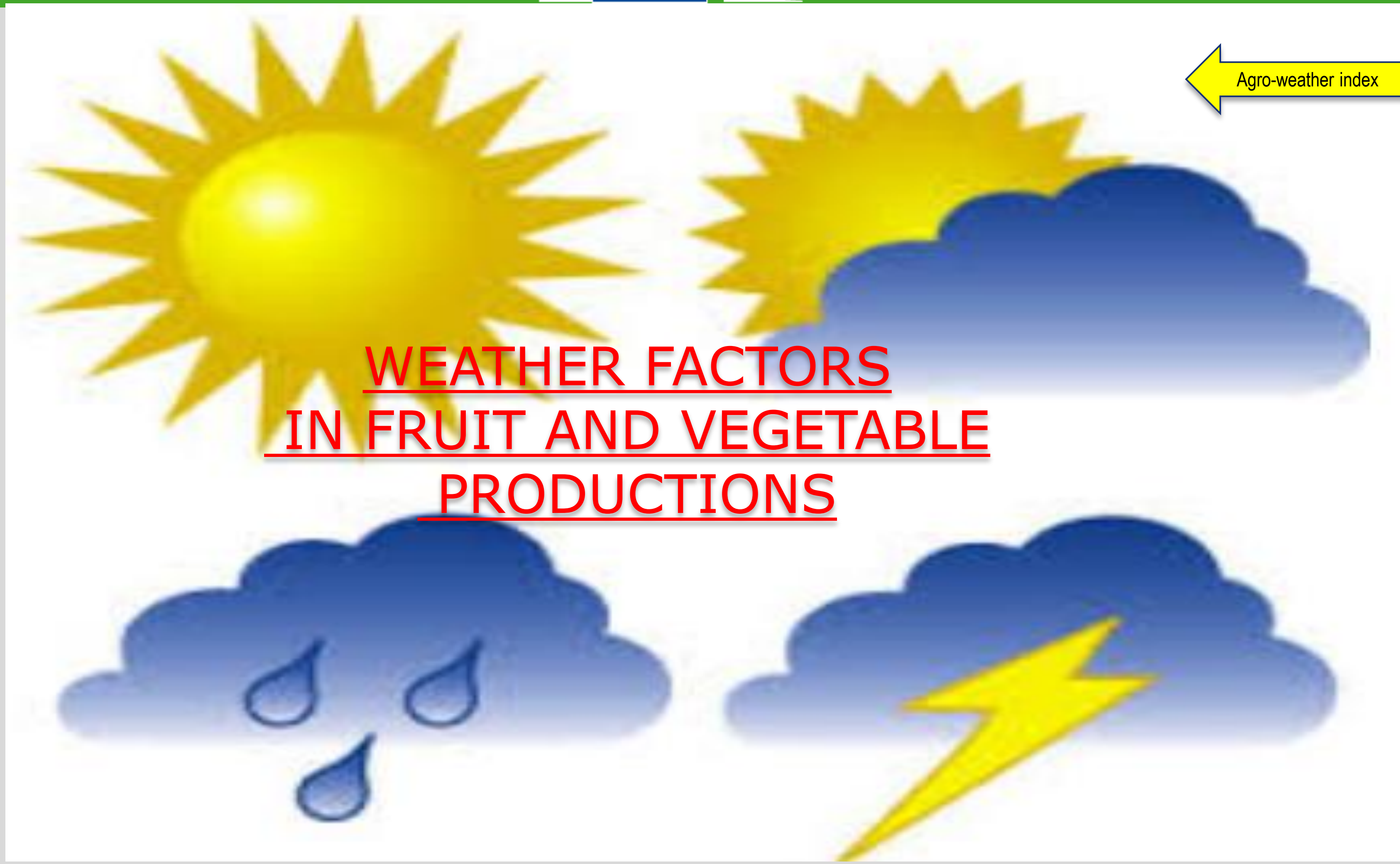
APPLE CROP 2017/18 - forecasts

000 Tonnes	2016/17	2017/18 f	Change on 3 year avg
EU	11 779	9 343	-23%
Poland	4 035	2 870	-27%
Italy	2 272	1 757	-25%
France	1 515	1 396	-10%
Germany	1 033	555	-47%
EU-other	2 923	2 766	-17%

Apple varieties in the EU - 2014/15 to 2016/17



(3) Other new varieties: Ariane, Belgica, Cameo, Diwa, Greenstar, Honey Crunch, Jazz, Junami, Kanzi, Mariac, Rubens, Tentation, Wellant,...



WEATHER FACTORS IN FRUIT AND VEGETABLE PRODUCTIONS

European Commission

AGRO-WEATHER INDEX

1. Background with main elements

2. Summary multi-event map
   * main events

3. Precipitation analysis
   * 90 day
   * 30 day
   * maps of current or recent droughts in the EU

4. Temperature analysis
   * 30 day average, °C, regional deviations
   * Relative number of cold days

5. Other agro-weather events

European Commission

Summary of main agro-weather events affecting markets during the current marketing year

RECENT EVENTS

1. Frosts registerd at the end of February 2018 in Southern Europe; several early crops of fruit (especially stonefruit) and vegetables were destroyed partially.

2. Heavy rains in several regions of Southern Europe (see 30 day precipitation map) implicated the end of drought in these regions and floods in some cases.

3. However, the effects of a severe drought were still felt in several regions of Southern Europe, i.e., Southern Portugal, South-Est Spain, West Sicily, Puglia and Crete. Currently there is rain deficit in Poland, the Baltic States and Scotland.

4. Very mild winter; one of the exceptions is cold spell last January in the Iberian penninsula.

European Commission

BACKGROUND

1. Late spring frosts (mid April to mid May 2017) defined the current apple crop.
2. Above average temperatures during the summer period (2017).

   * affected both production and consumption.
3. Drought and/or rain deficit in many Member States.

   * severe in Southern Europe

   * very severe in the Iberian penninsula
4. Very mild winter 2017/18.

AREAS OF CONCERN - EXTREME WEATHER EVENTS

Based on weather data from 1 March 2018 until 20 April 2018

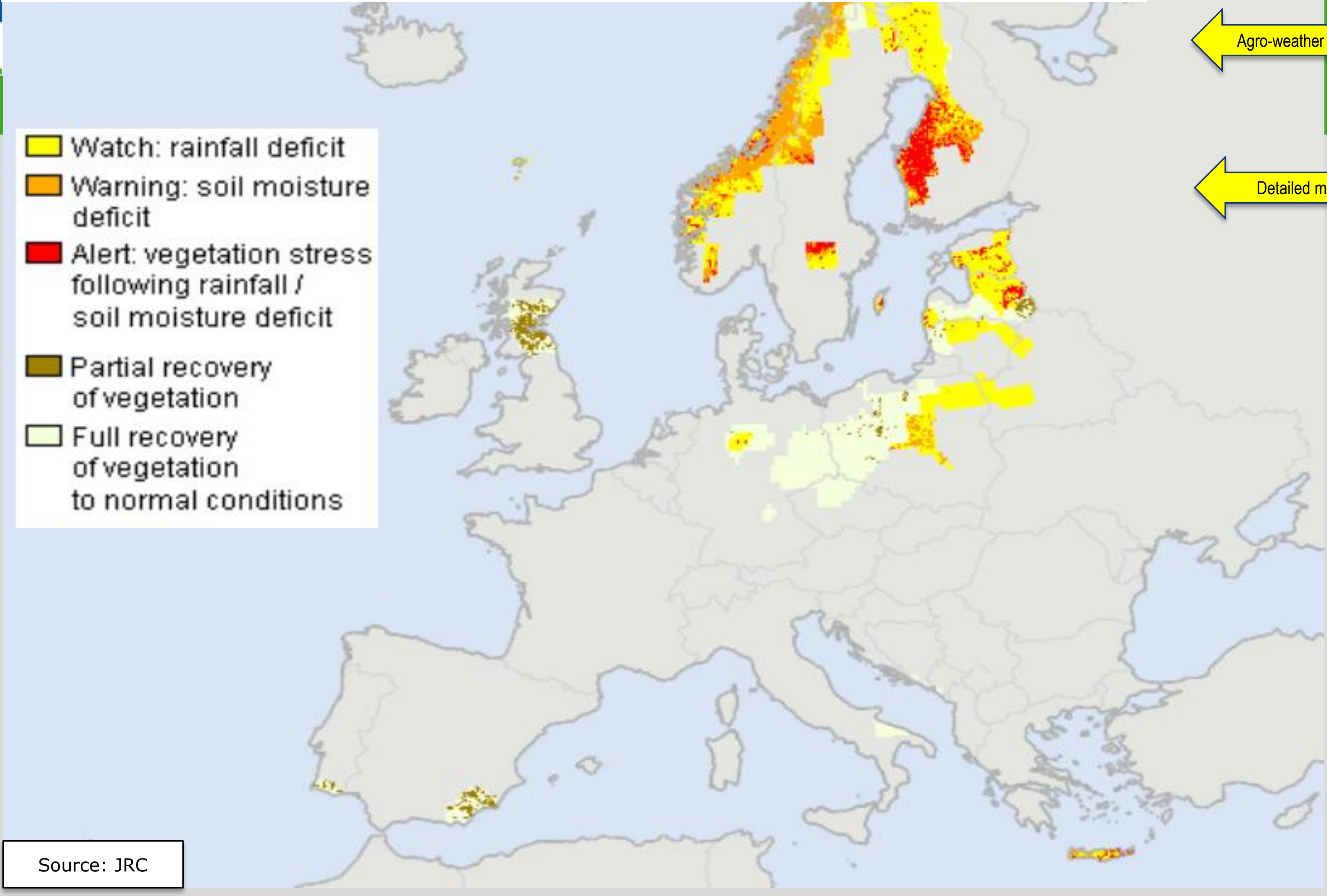
Source: JRC

Situation of Combined Drought Indicator in Europe - 1st ten-day period of April 2018

European Commission

Agro-weather index

Detailed maps



Source: JRC

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AVERAGE DAILY TEMPERATURE

ECMWF operational model (starting 12 April 2018

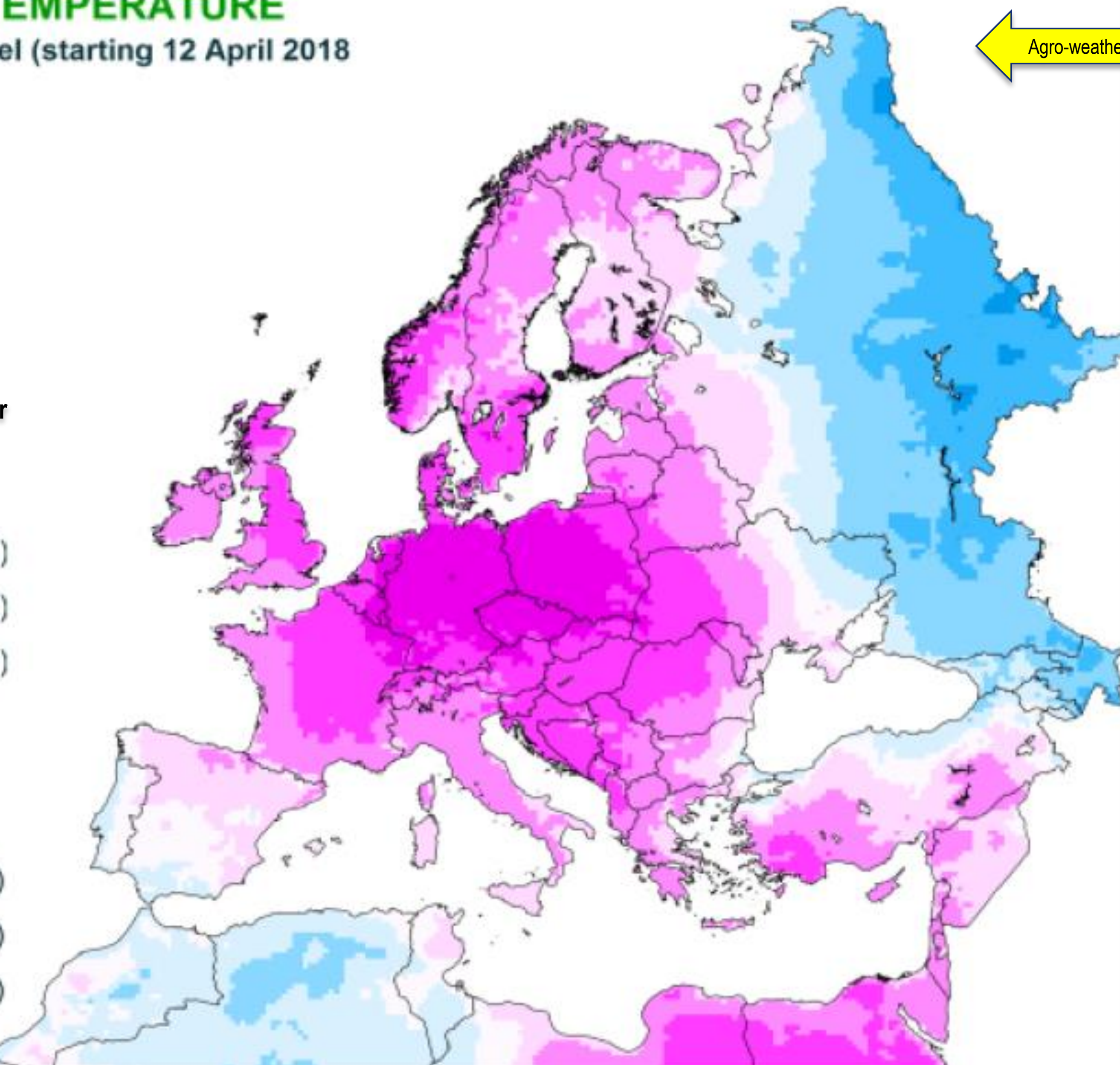
Averaged values

from : **13 April 2018**
to : **20 April 2018**

Deviation:

Year of interest - LTA

LTA = Long term average
YOI, year of interest = current year



Unit: degrees Celsius

- -8 - -6 (cooler in YOI)
- -6 - -4 (cooler in YOI)
- -4 - -2 (cooler in YOI)
- -2 - < -0.5
- -0.5 - 0.5
- > 0.5 - 2
- 2 - 4 (warmer in YOI)
- 4 - 6 (warmer in YOI)
- 6 - 8 (warmer in YOI)
- > 8 (warmer in YOI)

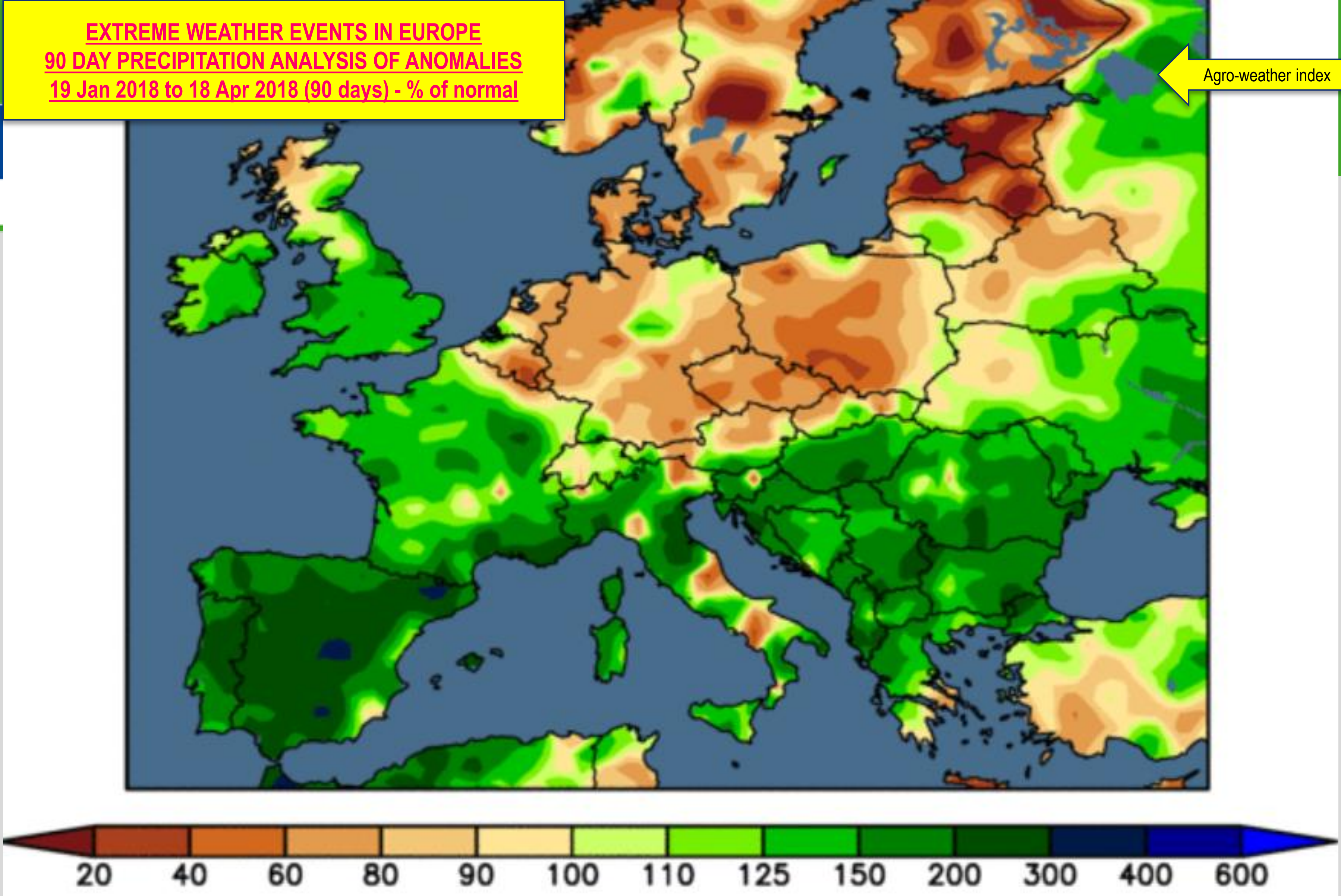
Agro-weather index

Further detail

EXTREME WEATHER EVENTS IN EUROPE
90 DAY PRECIPITATION ANALYSIS OF ANOMALIES
19 Jan 2018 to 18 Apr 2018 (90 days) - % of normal

European Commission

Agro-weather index



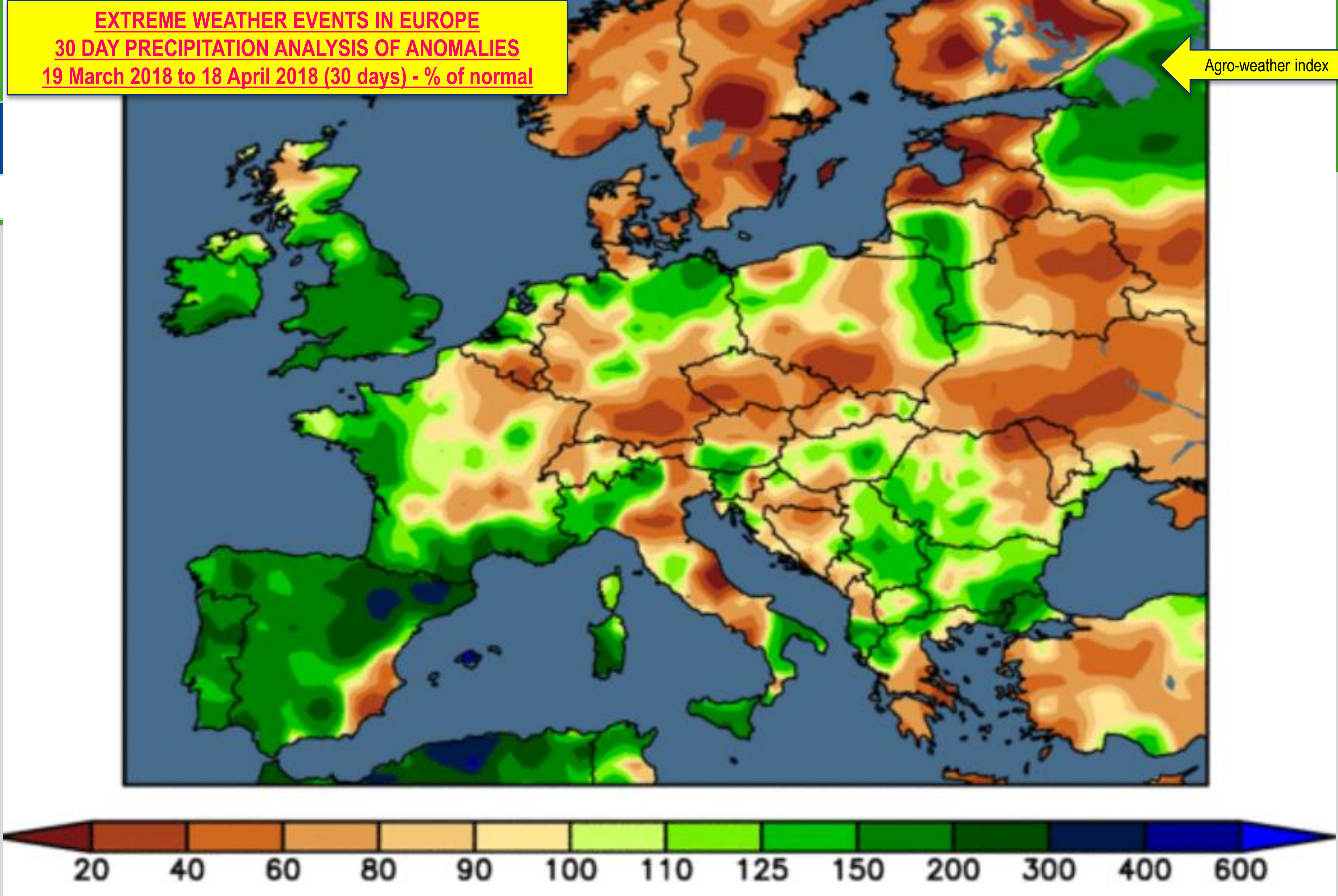
Source: Ag Weather

Further detail

EXTREME WEATHER EVENTS IN EUROPE
30 DAY PRECIPITATION ANALYSIS OF ANOMALIES
19 March 2018 to 18 April 2018 (30 days) - % of normal

European Commission

Agro-weather index



Source: Ag Weather

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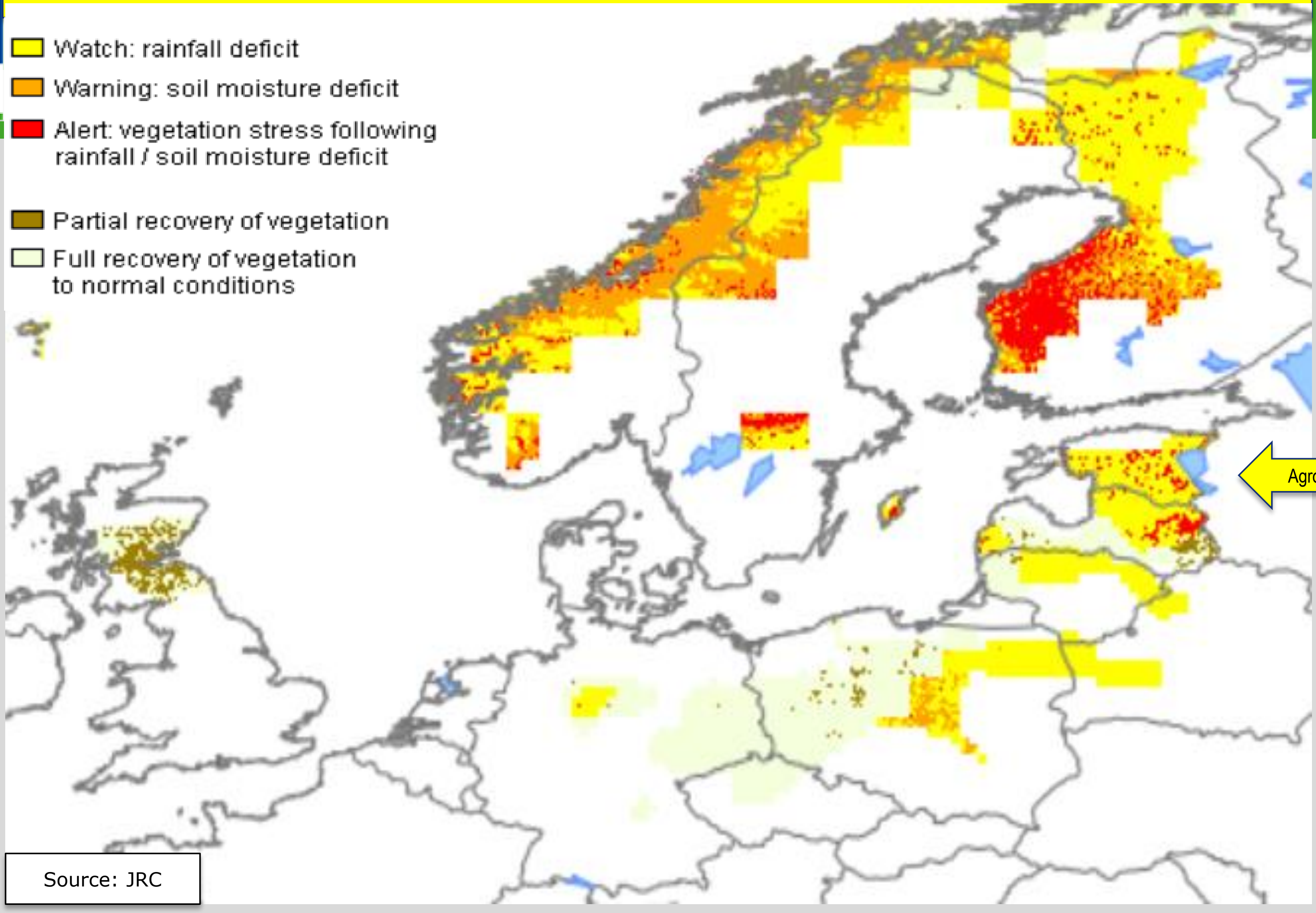
MAPS OF CURRENT DROUGHTS IN EUROPE (++) : CENTRAL AND NORTHERN EUROPE



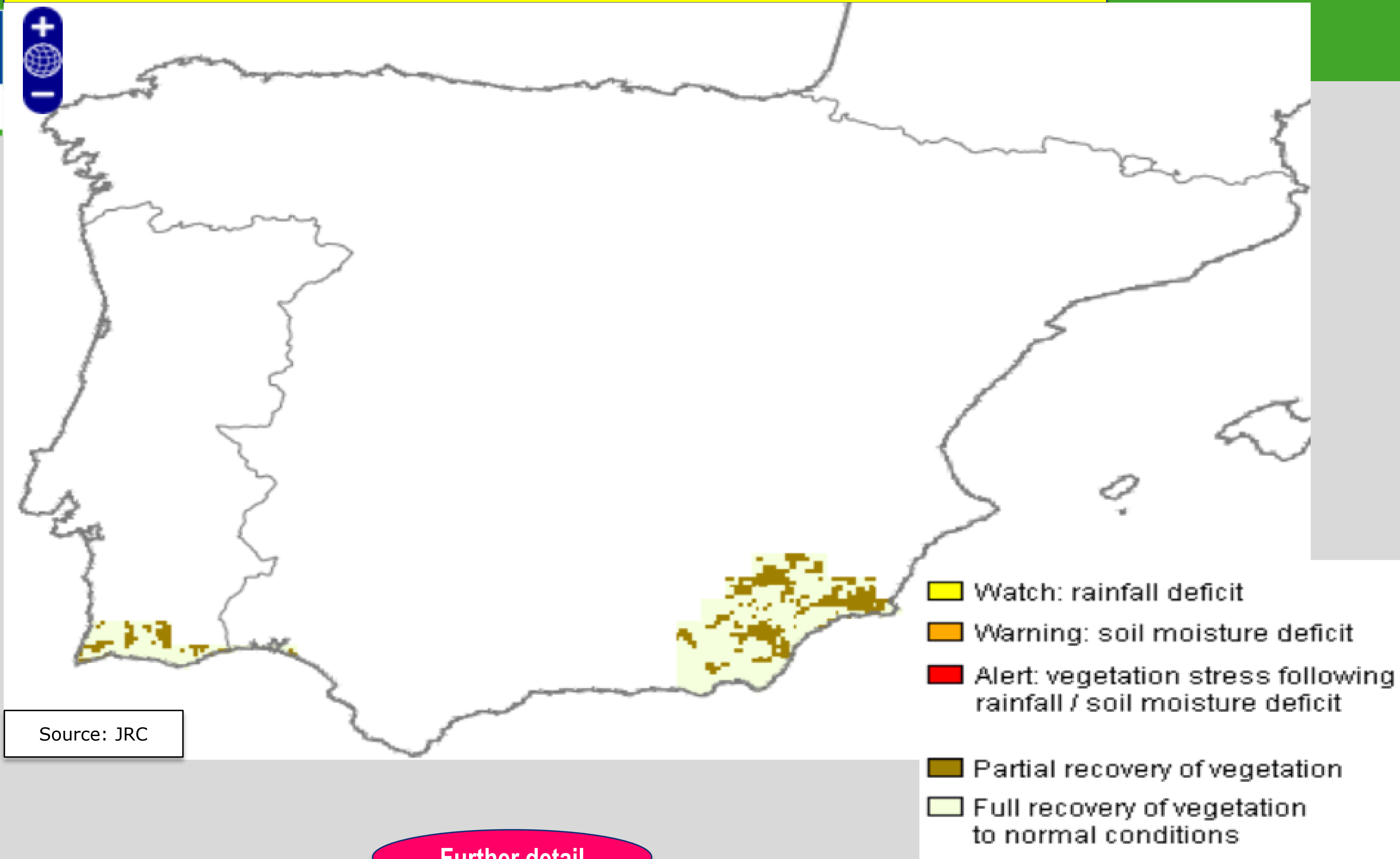
Source: JRC

Further detail

MAPS OF CURRENT DROUGHTS IN THE EU F&V PRODUCING AREAS: IBERIAN PENINSULA

Agro-weather index

European Commission



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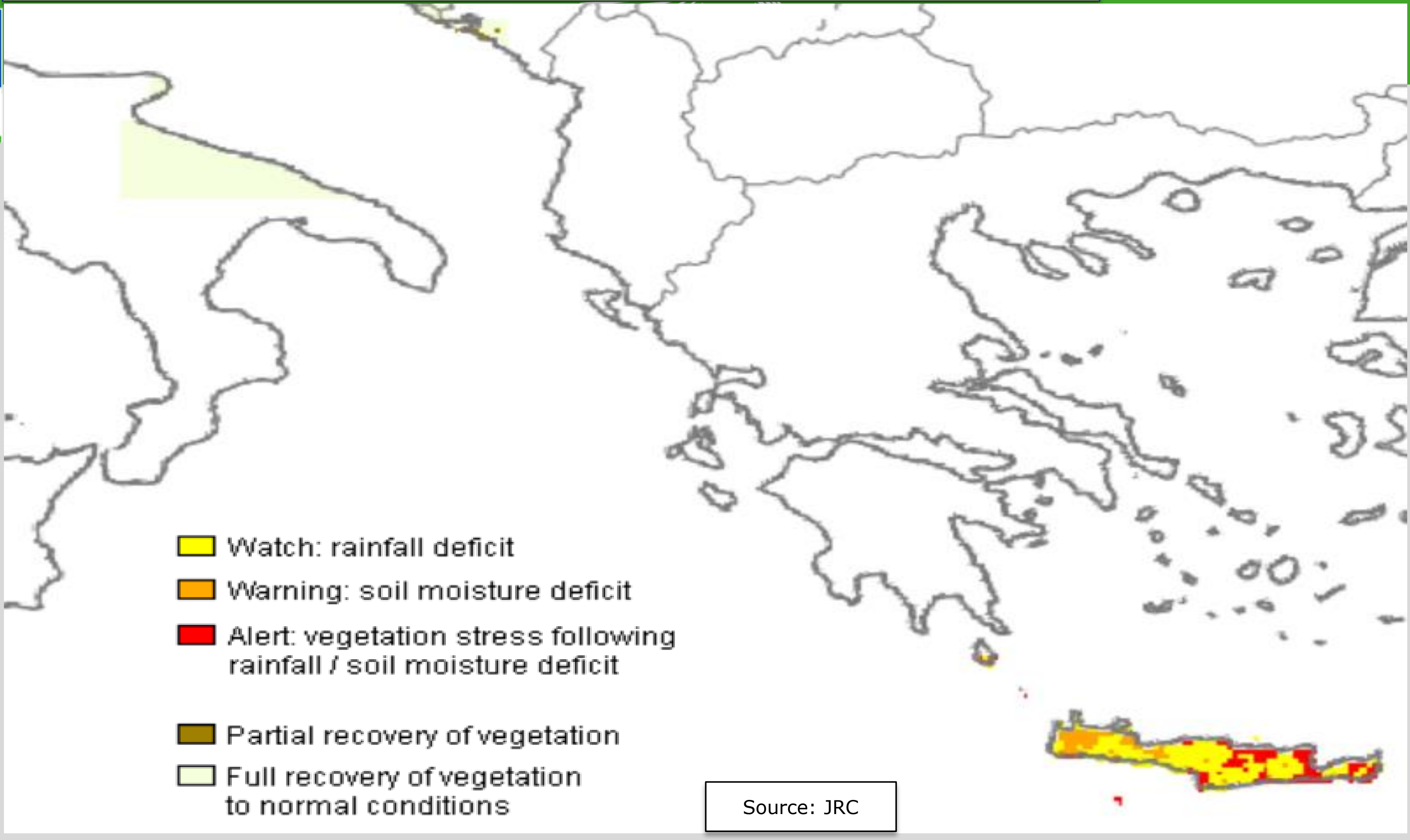
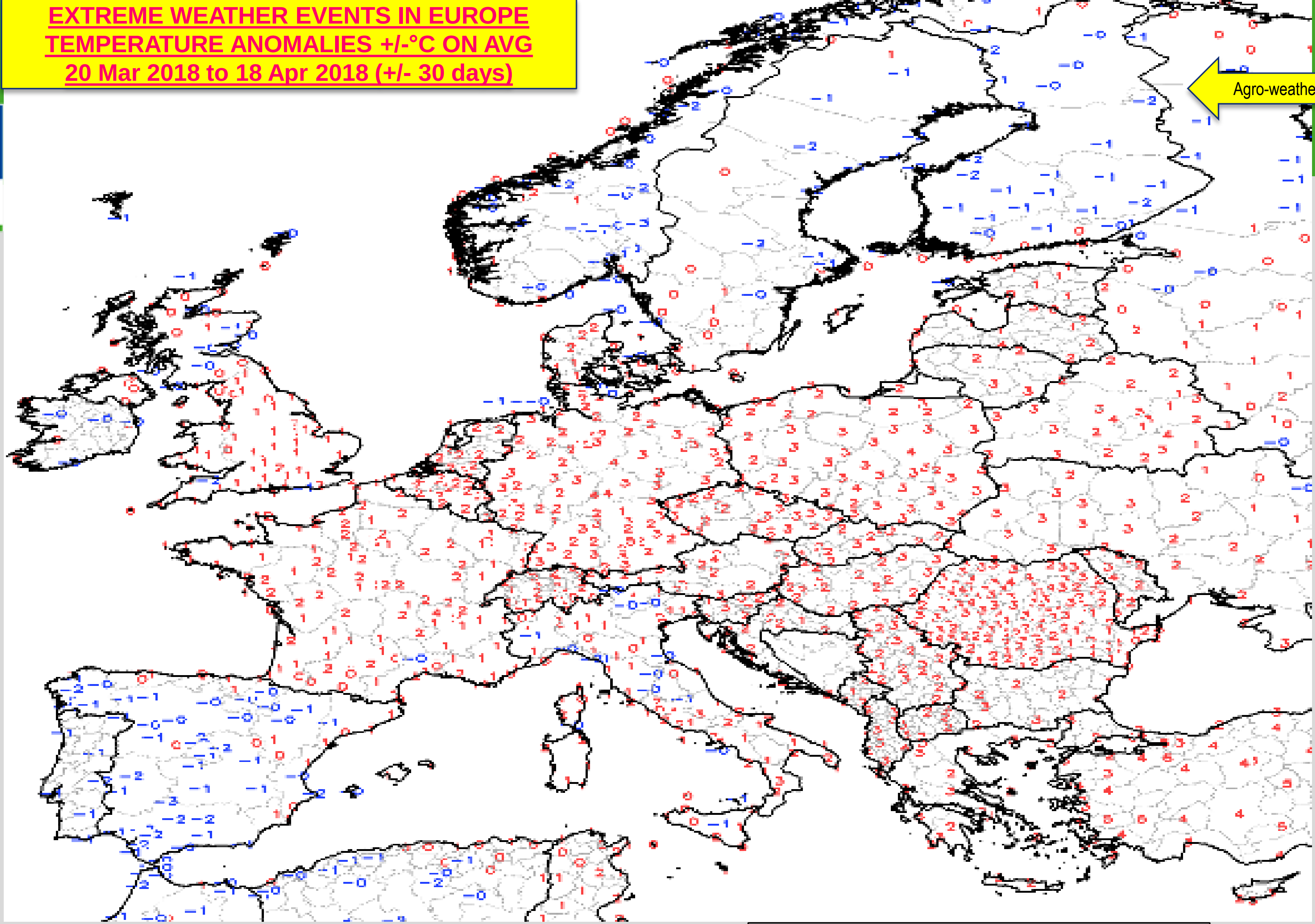
MAPS OF CURRENT DROUGHTS IN THE EU F&V PRODUCING AREAS (+): ITALY AND GREECE



EXTREME WEATHER EVENTS IN EUROPE TEMPERATURE ANOMALIES +/-°C ON AVG 20 Mar 2018 to 18 Apr 2018 (+/- 30 days)

European Commission

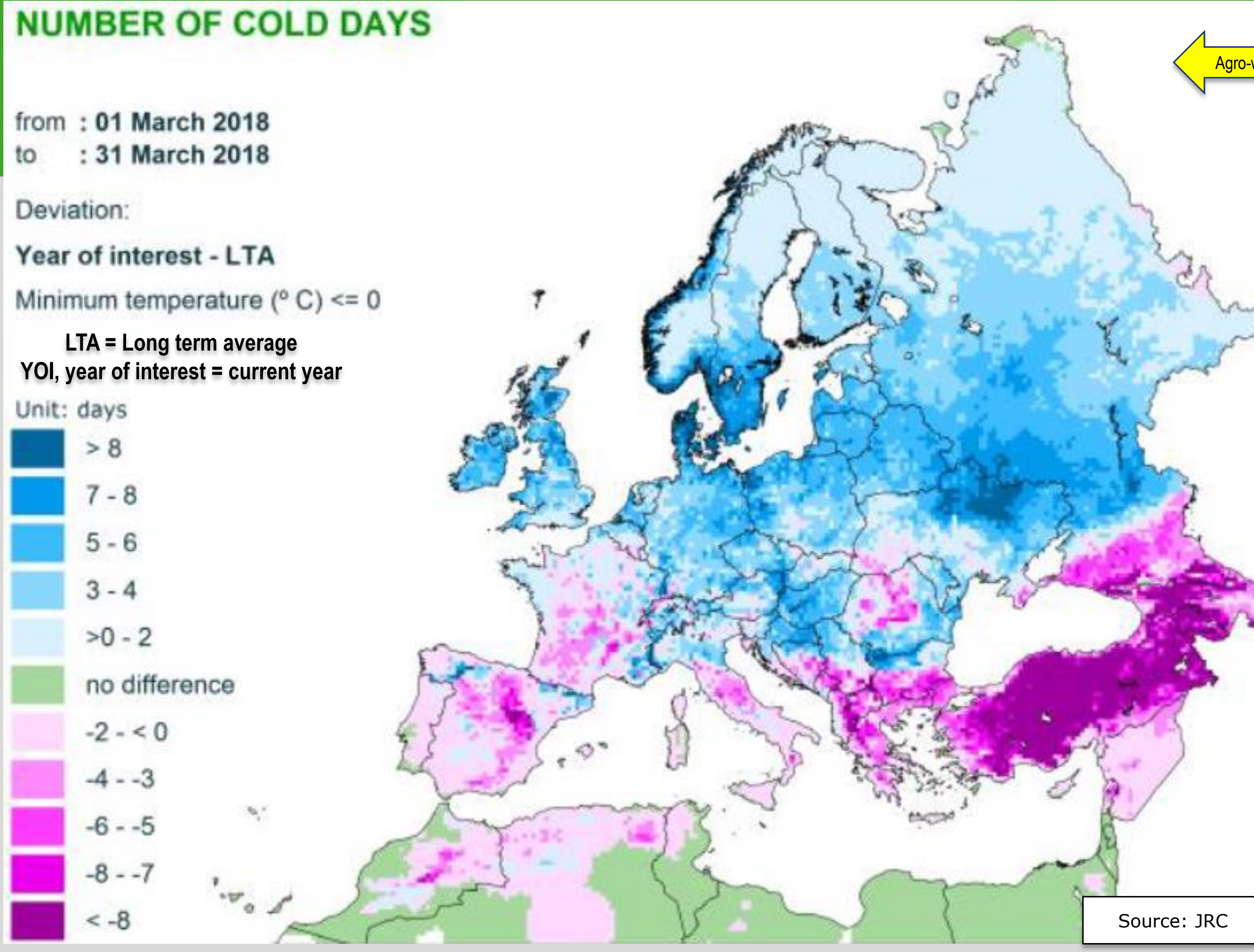


Agro-weather index

Source: Climate Prediction Center

Further detail

Agriculture and Rural Development



European Commission

Agro-weather indexx

Further detail

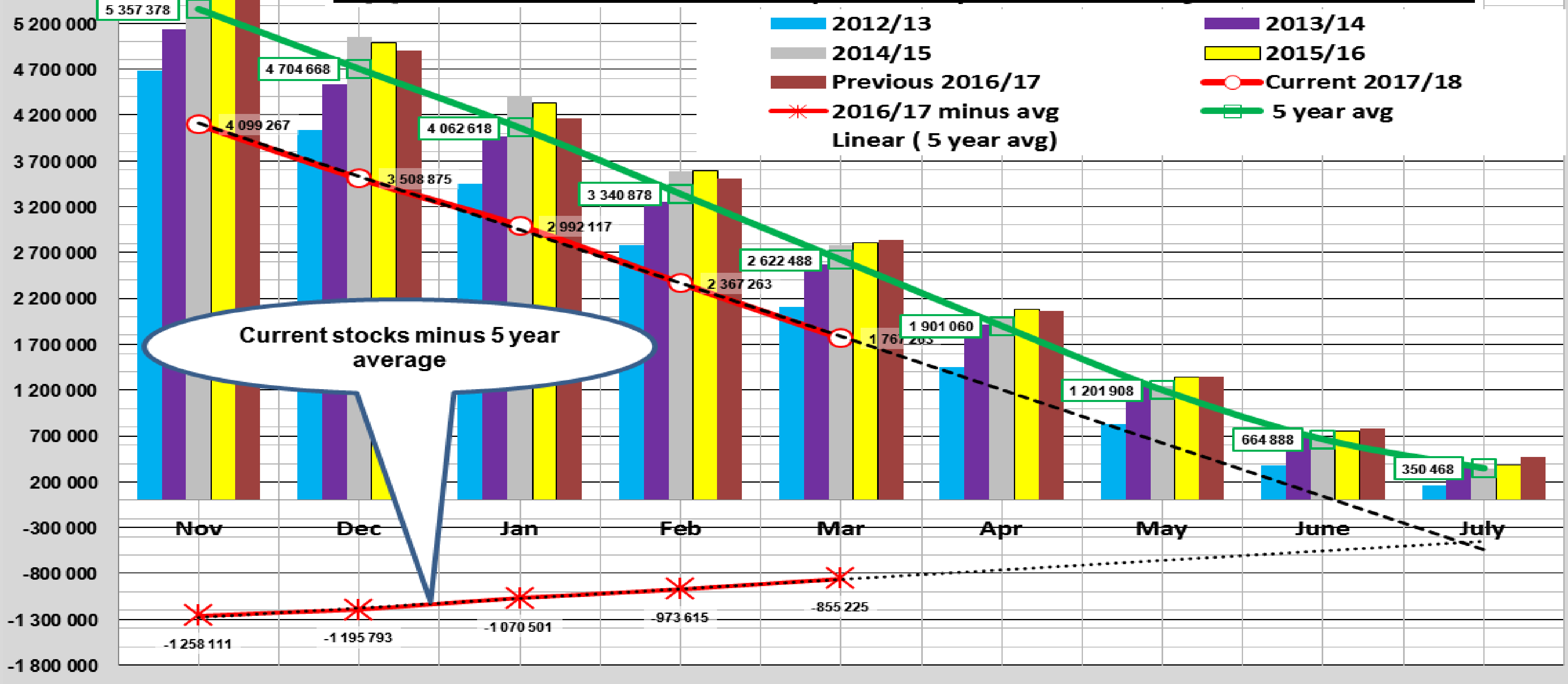
European Commission

EXTREME WEATHER EVENTS IN EUROPE 15 March 2018 to 20 April 2018

Source: Severe weather database

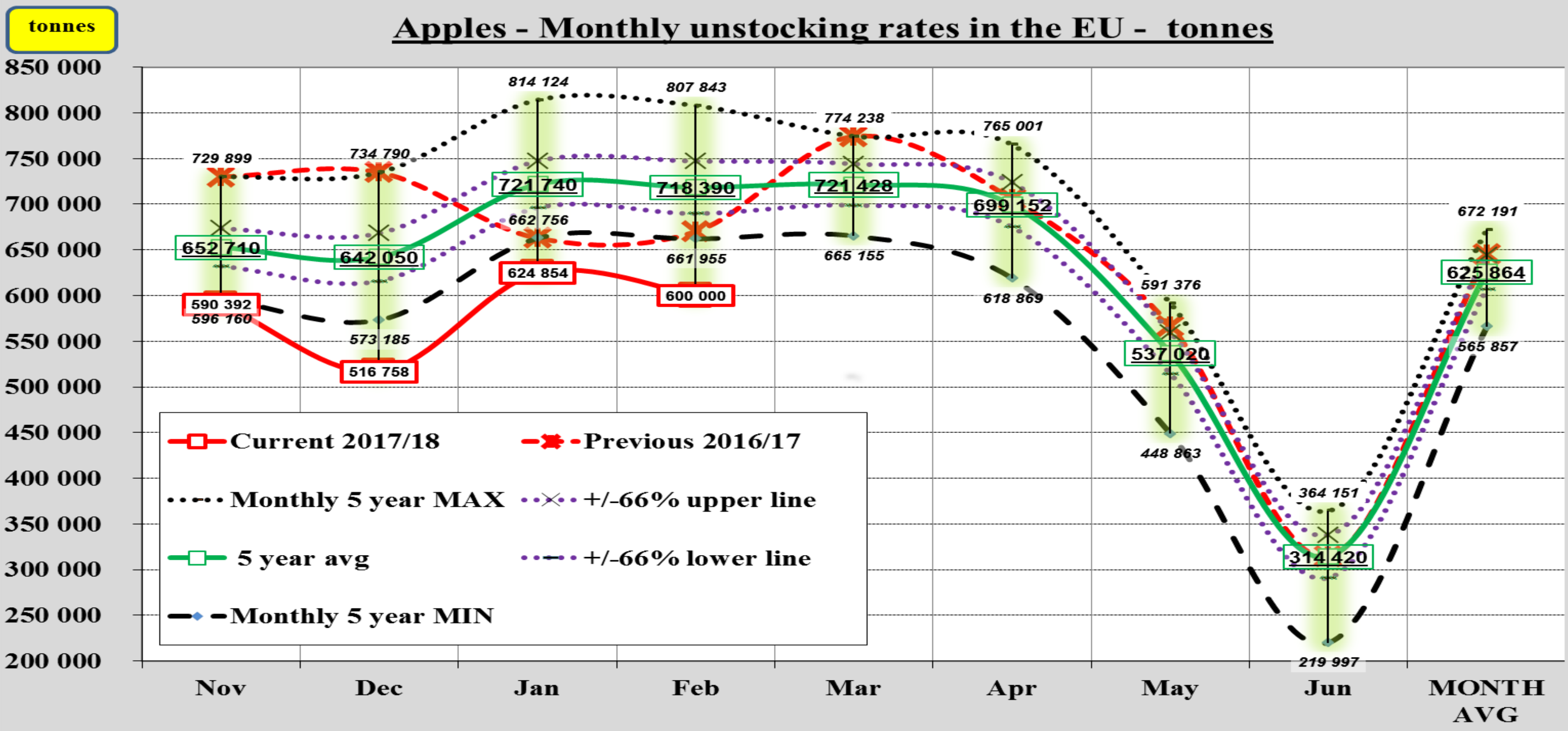
European Commission

Apple stocks in the EU (tonnes) the 1st day of the month



Data sources: WAPA&AMI

Apples - Monthly unstocking rates in the EU - tonnes



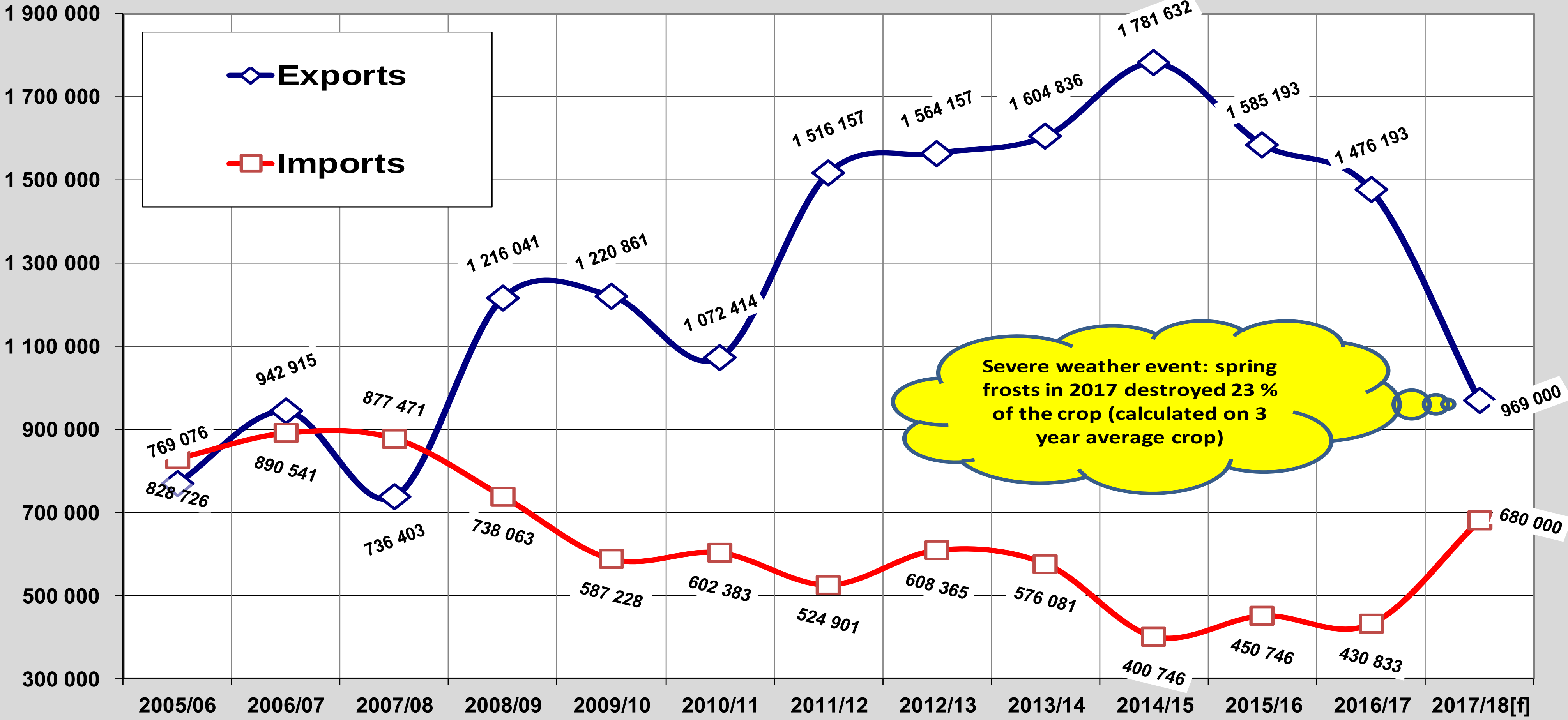
3. TRADE

3.1. Evolution of the trade balance

3.2. Import monitoring

2.3. Export development (export diversification is under section 5)

ExtraEU trade for apples - Aug to Jul - Tonnes



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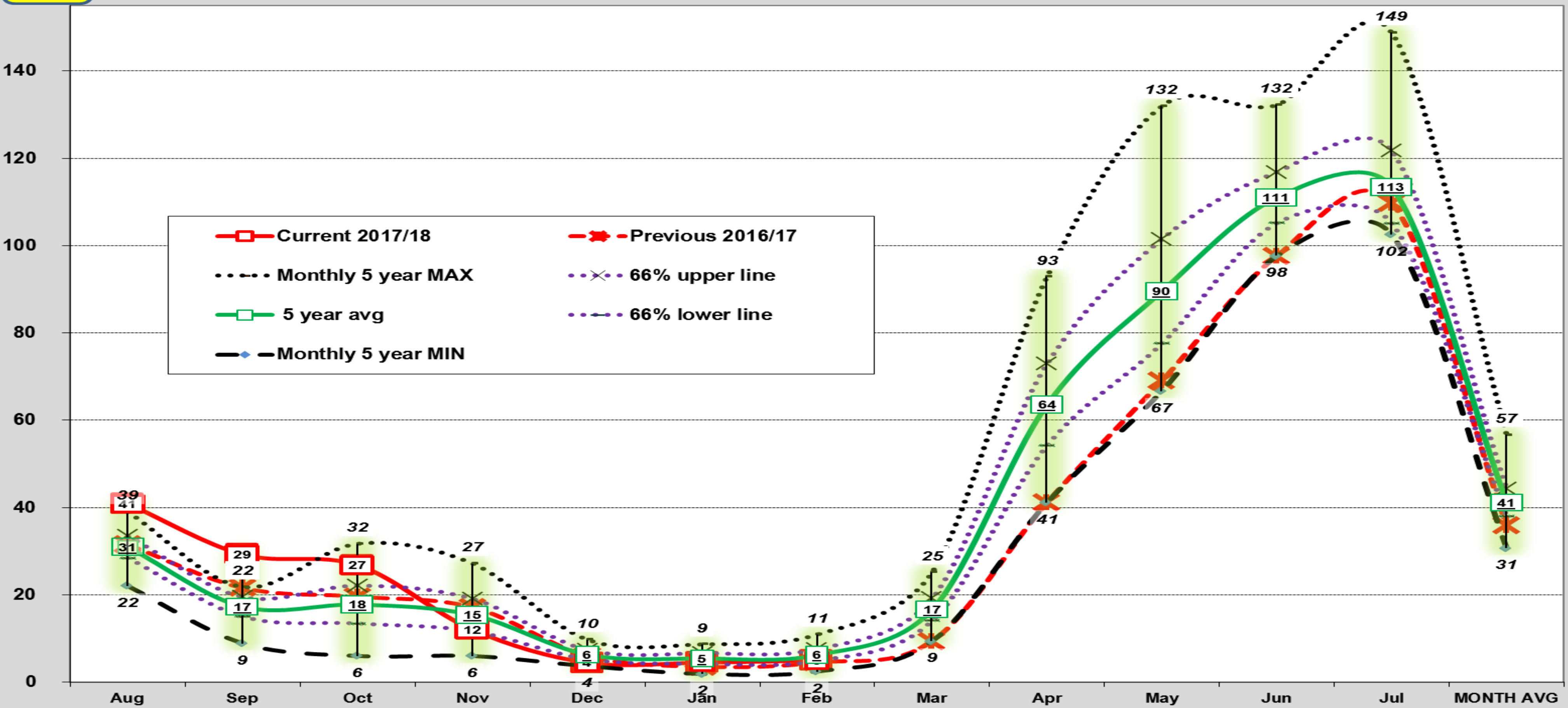
000 tonnes

Apples - Extra-EU monthly imports - 000 tonnes (= million kgs)



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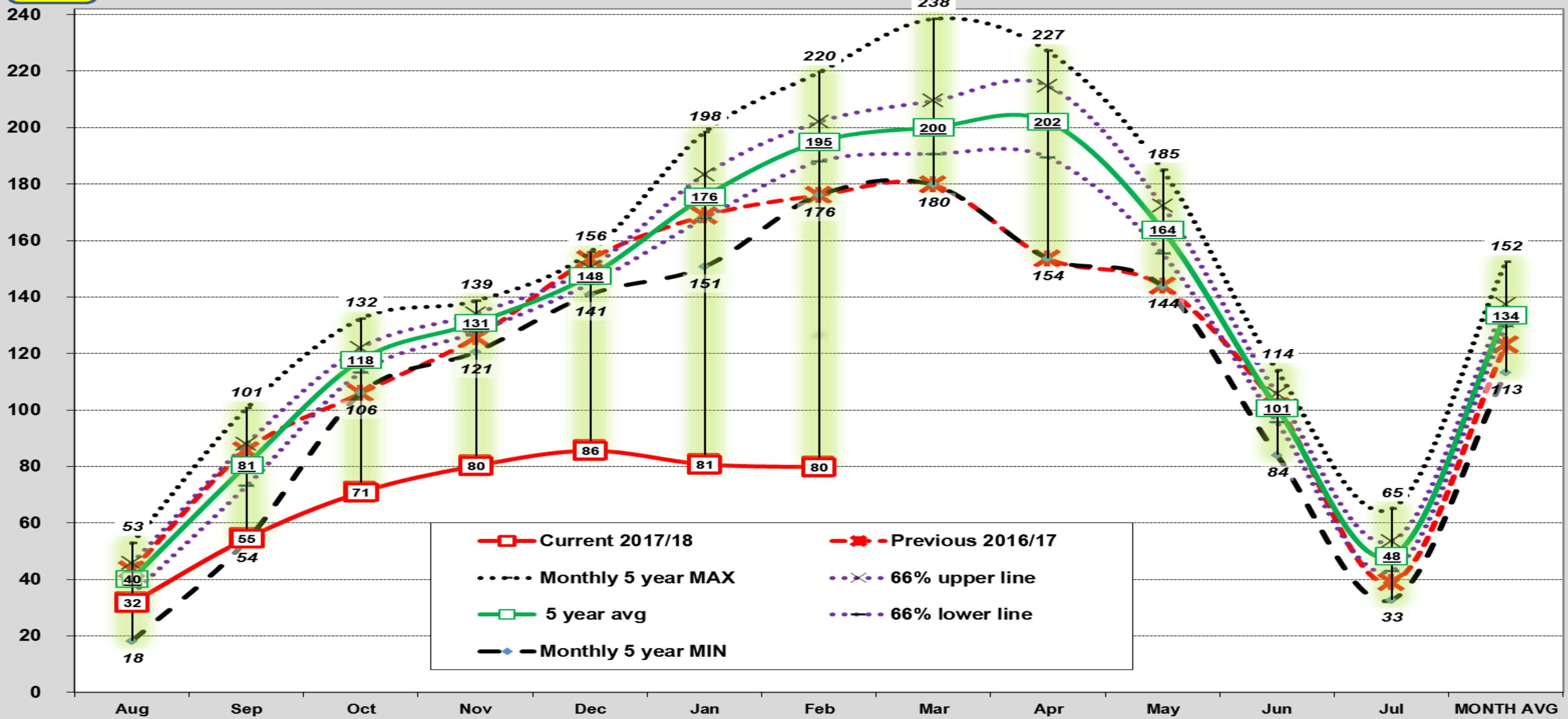
000 tonnes

Apples - Extra-EU monthly exports - 000 tonnes (= million kgs)



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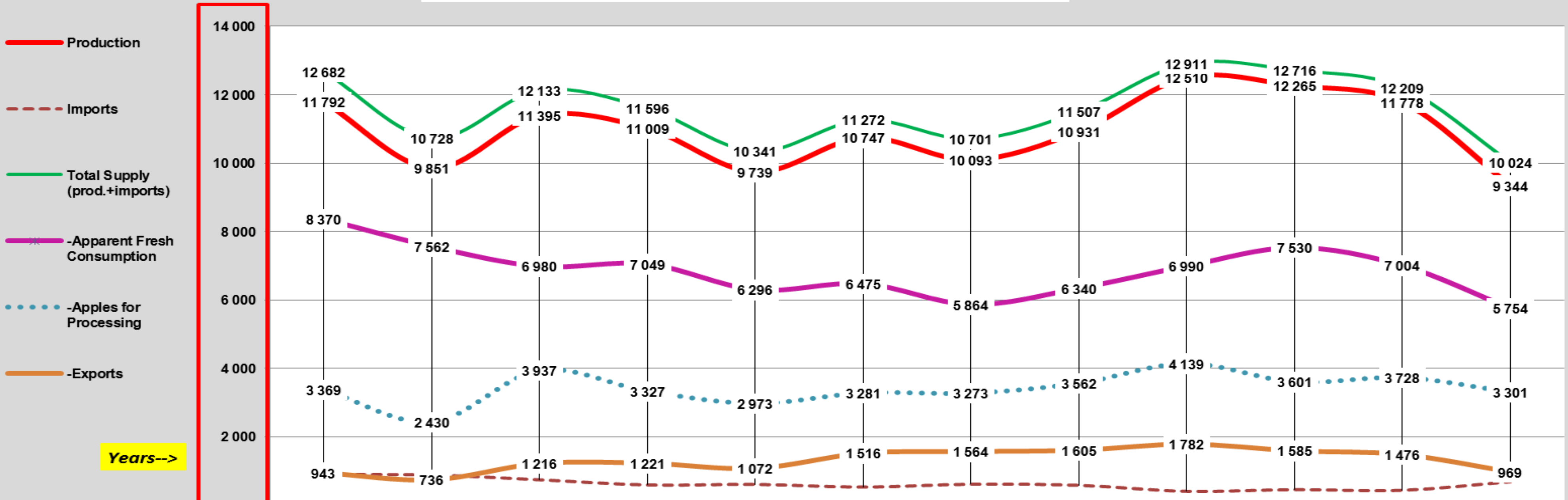
4. KEY BALANCE INDICATORS

including CONSUMPTION

- Production
- Imports
- Total supply (production +imports)
  * Apparent fresh consumption
  * Apples for processing
  * Exports
- Market access (Imports/Fresh consumption)
- Fresh production exported (%)
- Apparent fresh consumption (kg/person)

Apples - key balance indicators including consumption

Marketing year: Aug to Jul - 000 tonnes



	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17[e]	2017/18[f]
Production	11 792	9 851	11 395	11 009	9 739	10 747	10 093	10 931	12 510	12 265	11 778	9 344
Imports	891	877	738	587	602	525	608	576	401	451	431	680
Total Supply (prod.+imports)	12 682	10 728	12 133	11 596	10 341	11 272	10 701	11 507	12 911	12 716	12 209	10 024
-Apparent Fresh Consumption	8 370	7 562	6 980	7 049	6 296	6 475	5 864	6 340	6 990	7 530	7 004	5 754
-Apples for Processing	3 369	2 430	3 937	3 327	2 973	3 281	3 273	3 562	4 139	3 601	3 728	3 301
-Exports	943	736	1 216	1 221	1 072	1 516	1 564	1 605	1 782	1 585	1 476	969

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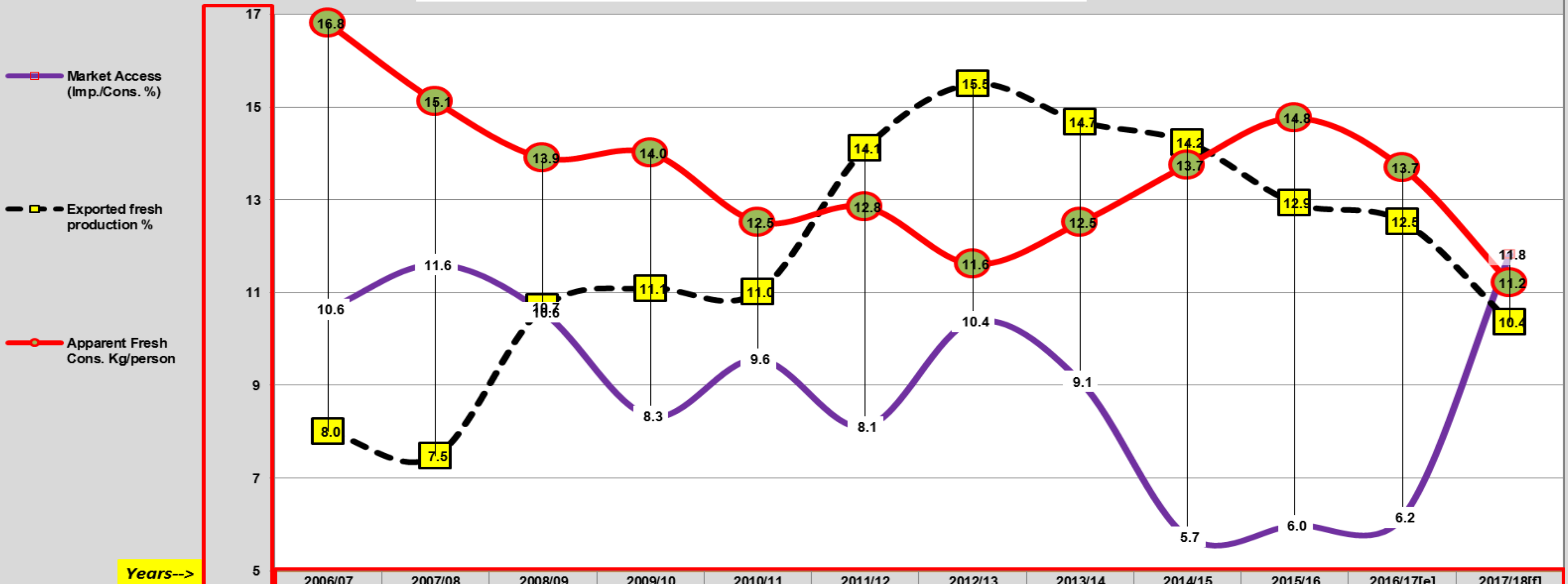
Apples - key balance indicators including consumption (+)

Marketing year: Aug to Jul - Units: % and kg per person (consumption)



	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17[e]	2017/18[f]
Market Access (Imp./Cons. %)	10.6	11.6	10.6	8.3	9.6	8.1	10.4	9.1	5.7	6.0	6.2	11.8
Exported fresh production %	8.0	7.5	10.7	11.1	11.0	14.1	15.5	14.7	14.2	12.9	12.5	10.4
Apparent Fresh Cons. Kg/person	16.8	15.1	13.9	14.0	12.5	12.8	11.6	12.5	13.7	14.8	13.7	11.2

5. EXPORT DIVERSIFICATION

- Map of top world importers of apples
- Bar chart on top world importers and annual growth rates
- Key trade indicators on top world importers of apples
- Main apple traders in the world and degree of diversification
- World consumption of apples, main players

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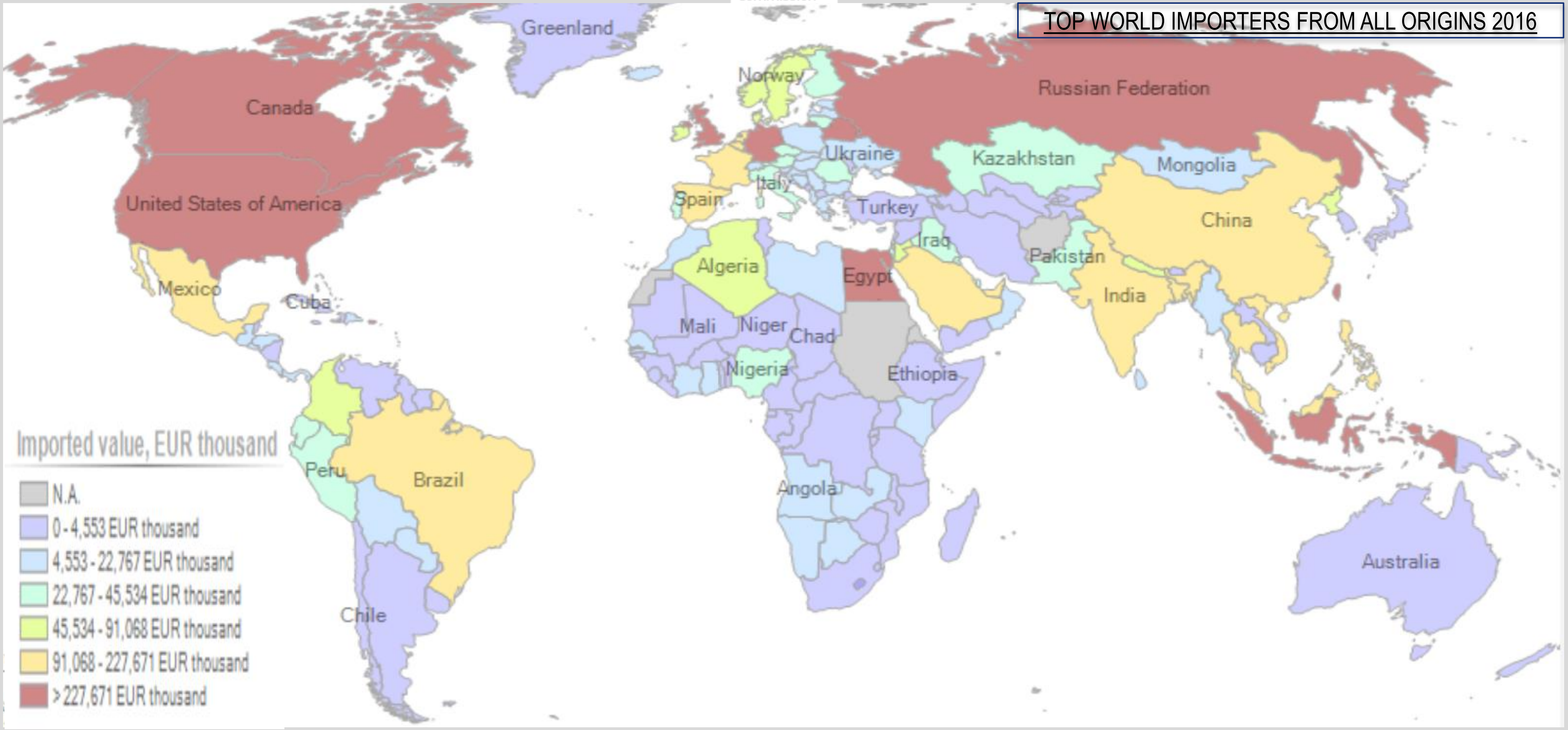
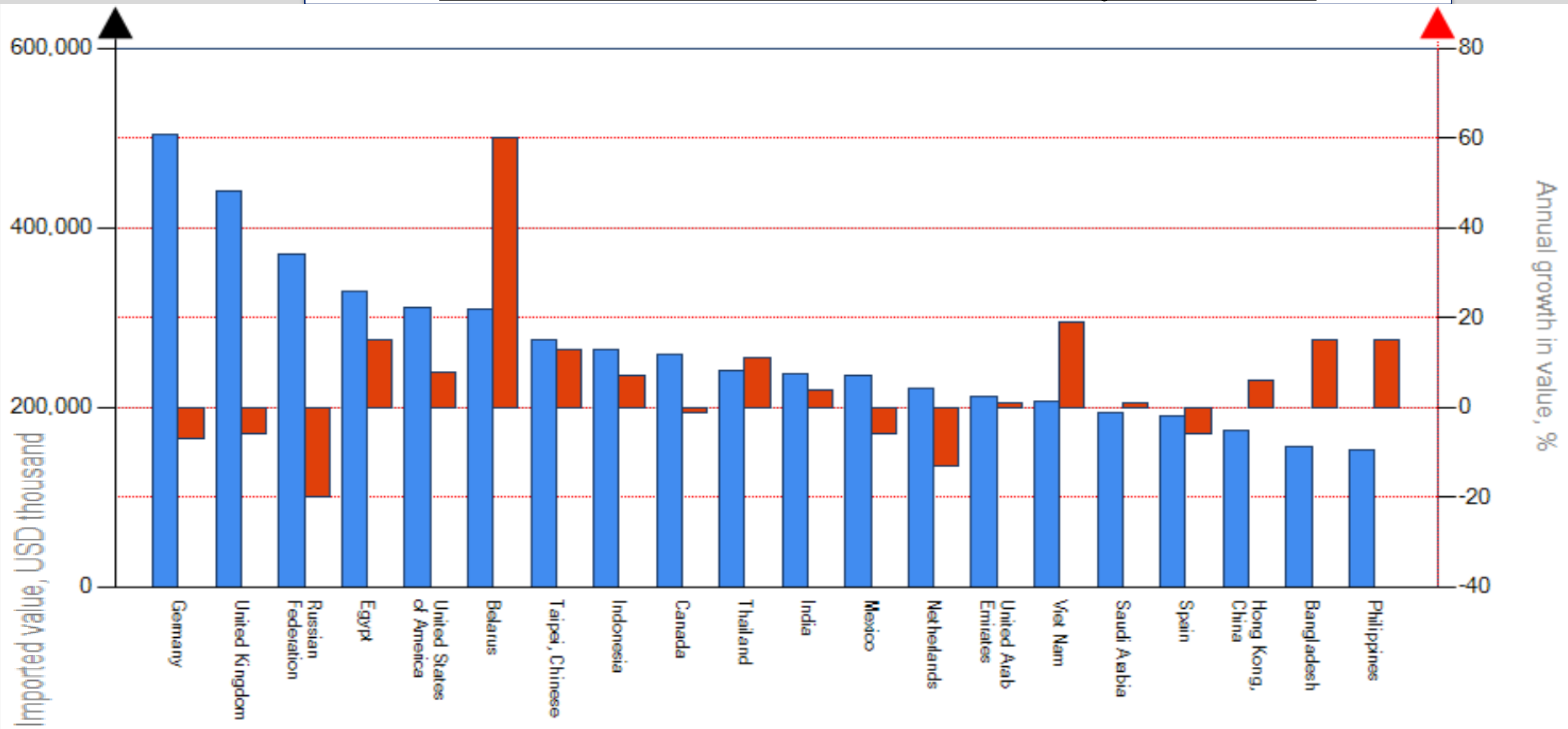
TOP WORLD IMPORTERS FROM ALL ORIGINS 2016



TOP WORLD APPLE IMPORTERS FROM ALL ORIGINS and % Annual growth in value 2012-16



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TOP WORLD APPLE IMPORTERS FROM ALL ORIGINS

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Importers	Value imported in 2016 (USD thousand)	Trade balance in 2016 (USD thousand)	Quantity imported in 2016	Quantity Unit	Unit value (USD/unit)	Annual growth in value between 2012-2016 (%)	Annual growth in quantity between 2012-2016 (%)	Share in world imports (%)	Average distance of supplying countries (km)	Concentration of supplying countries	Average tariff (estimated) applied by the country (%)	Number of non-tariff requirements applied by the country
World	7,772,442	-589,592	8,863,645	Tons	877	0	-5	100	4,815	0.09		
Germany	503,940	-444,104	602,398	Tons	837	-7	-1	6.5	4,131	0.23	3.4	20
United Kingdom	440,471	-427,730	397,875	Tons	1,107	-6	-5	5.7	5,909	0.18	3.4	20
Russian Federation	370,430	-365,822	676,837	Tons	547	-20	-16	4.8	3,905	0.2	5.8	21
Egypt	329,147	-328,995	353,594	Tons	931	15	-20	4.2	1,743	0.2	30.2	20
United States of America	310,437	625,059	193,449	Tons	1,605	8	-2	4	8,983	0.37	0	
Belarus	308,856	-284,336	599,014	Tons	516	60	53	4	803	0.73	6.2	
Taipei, Chinese	274,745	-274,744	171,157	Tons	1,605	13	6	3.5	10,000	0.22	25.8	
Indonesia	263,530	-263,482	139,926	Tons	1,883	7	-9	3.4	7,394	0.51	4.8	
Canada	259,774	-220,921	238,785	Tons	1,088	-1	2	3.3	3,629	0.55	2.5	
Thailand	240,876	-238,925	189,345	Tons	1,272	11	8	3.1	4,823	0.58	7.4	
India	237,800	-232,406	246,808	Tons	964	4	6	3.1	8,664	0.27	48.3	26
Mexico	234,837	-233,081	212,678	Tons	1,104	-6	-1	3	1,736	0.95	19.3	6
Netherlands	220,545	-36,118	208,587	Tons	1,057	-13	-12	2.8	5,697	0.12	3.4	20
United Arab Emirates	212,960	-199,368	209,135	Tons	1,018	1	2	2.7	7,737	0.11	0	26
Viet Nam	205,823	-205,614	152,797	Tons	1,347	19	10	2.6	5,312	0.5	10.8	
Saudi Arabia	194,915	-192,603	201,240	Tons	969	1	2	2.5	7,513	0.21	0	29
Spain	190,833	-77,857	249,985	Tons	763	-6	2	2.5	2,095	0.32	3.4	20
Hong Kong, China	174,718	-131,159	168,252	Tons	1,038	6	11	2.2	6,315	0.25	0	10
Bangladesh	155,578	-155,578	230,877	Tons	674	15	15	2	4,073	0.66	25	
Philippines	153,280	-153,280	153,050	Tons	1,002	15	12	2	2,904	0.91	6.9	28
Brazil	139,893	-121,740	155,479	Tons	900	14	19	1.8	4,645	0.33	9.6	8
Belgium	136,066	-1,919	131,345	Tons	1,036	-7	-5	1.8	5,492	0.24	3.4	20
China	123,225	1,329,707	67,109	Tons	1,836	15	10	1.6	11,792	0.31	17.6	14
France	122,700	468,601	176,929	Tons	693	-13	-6	1.6	4,761	0.12	3.4	20

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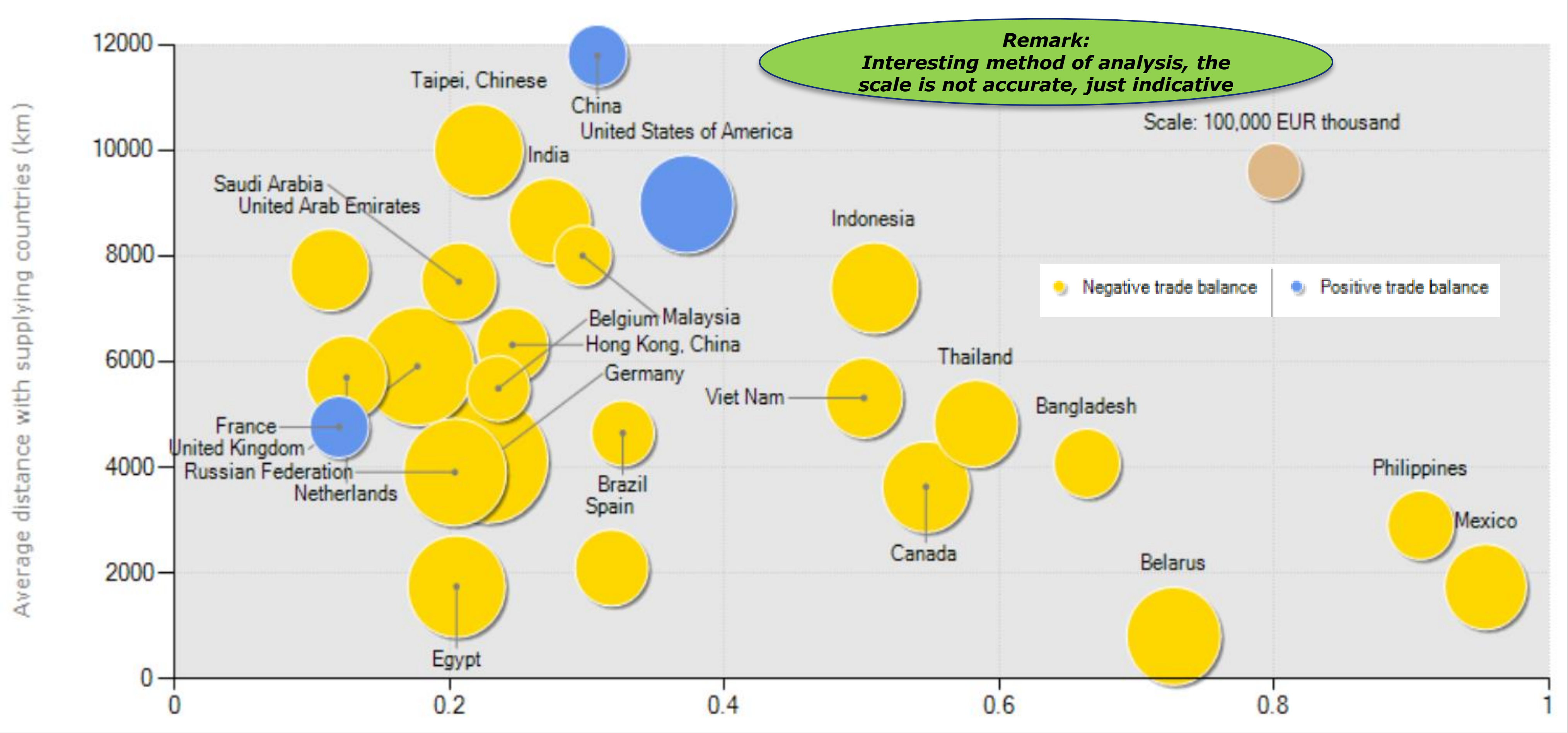
<- diversified, many trade partners

concentrated, few trade partners->

TOP 25 APPLE IMPORTERS OF THE WORLD FROM ALL ORIGINS - 2016 – Value Terms



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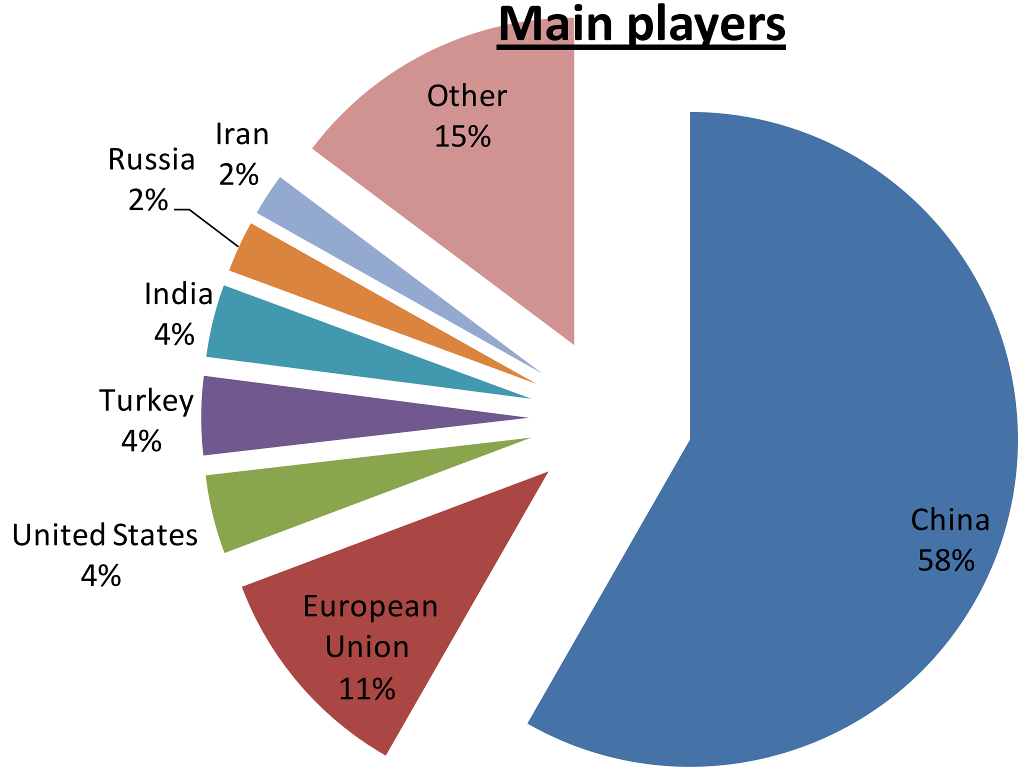
World consumption of apples 2015/16 (volume)
Main players



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Thank you