

Southern Hemisphere season overview

GROUP OF EXPERTS "APPLES AND PEARS" NO. 29
03. MAY 2018, BRÜSSEL - BELGIUM

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natürlich informiert.

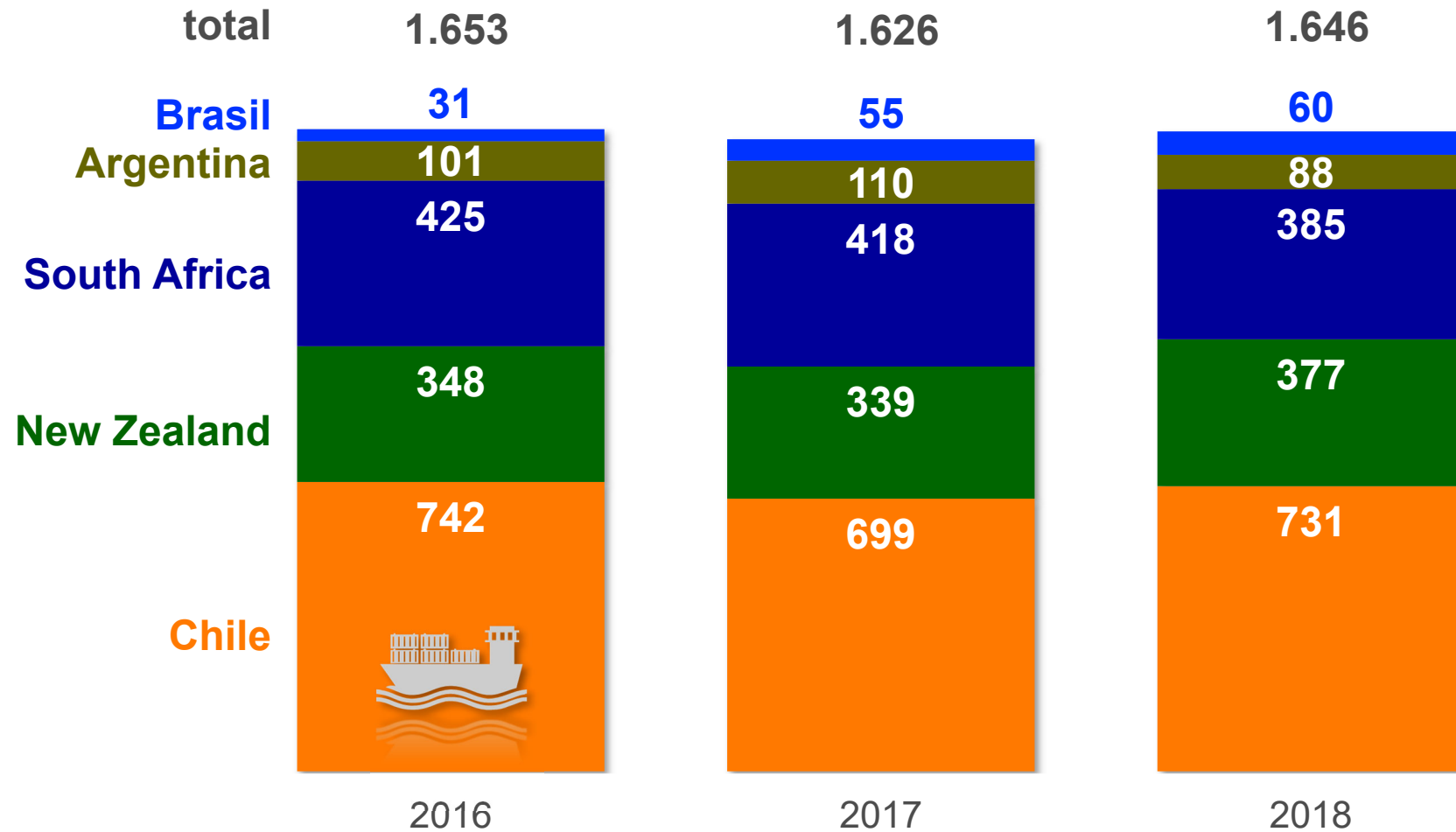
Contents

1 Apple market - More overseas imports?

2 Pear market – Loser overseas pears?

Higher exports?

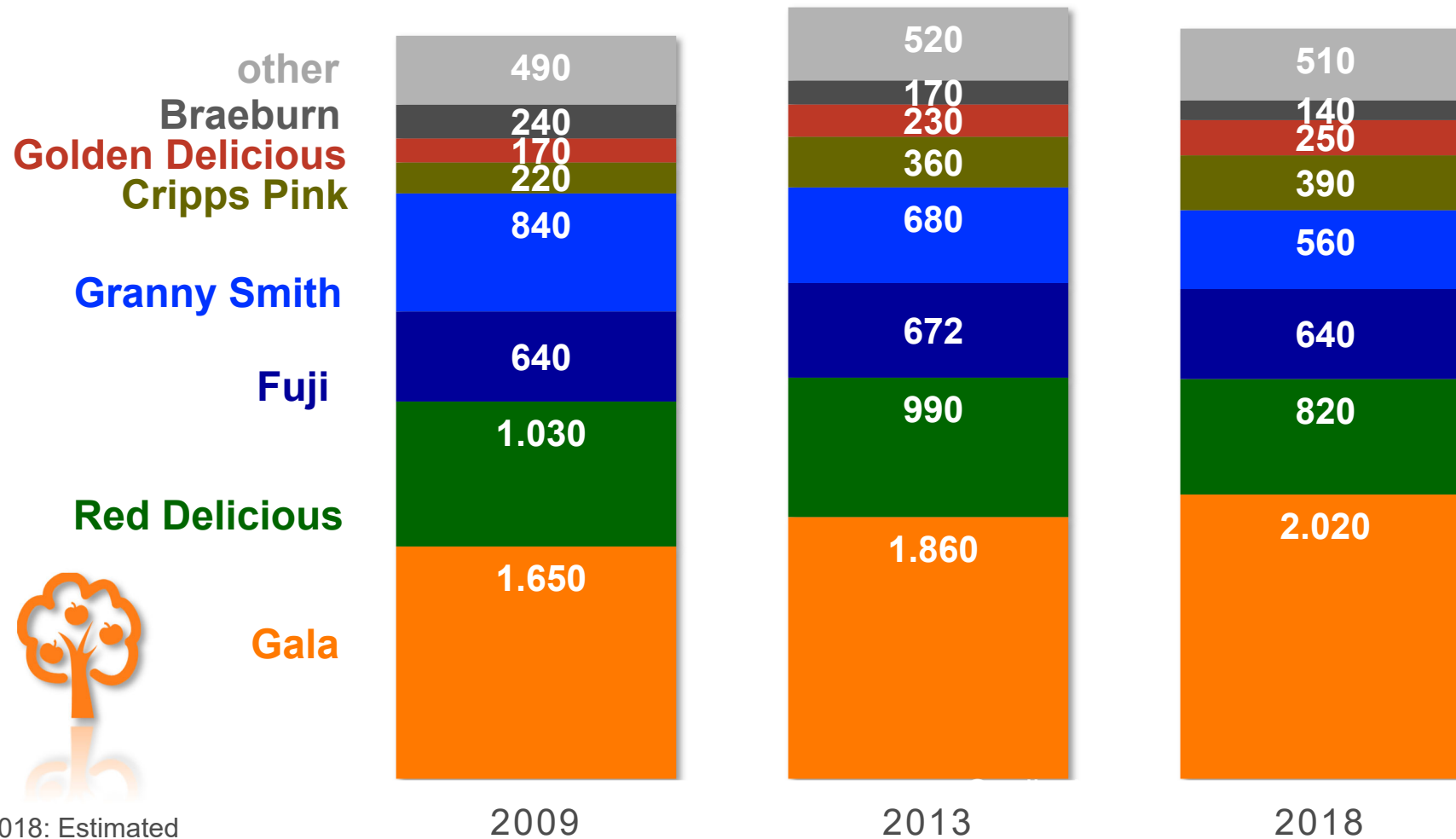
Exportvolumes of apples from oversea in 1,000 t



Gala stays number 1



Apple harvest in selected cultivation areas in the Southern Hemisphere in long-term comparison in 1,000 t



2018: Estimated

Global apple markets – Switching Gala



Oversea apples – Global exports until the end of July, in 1.000 t

Others

Fuji

Granny

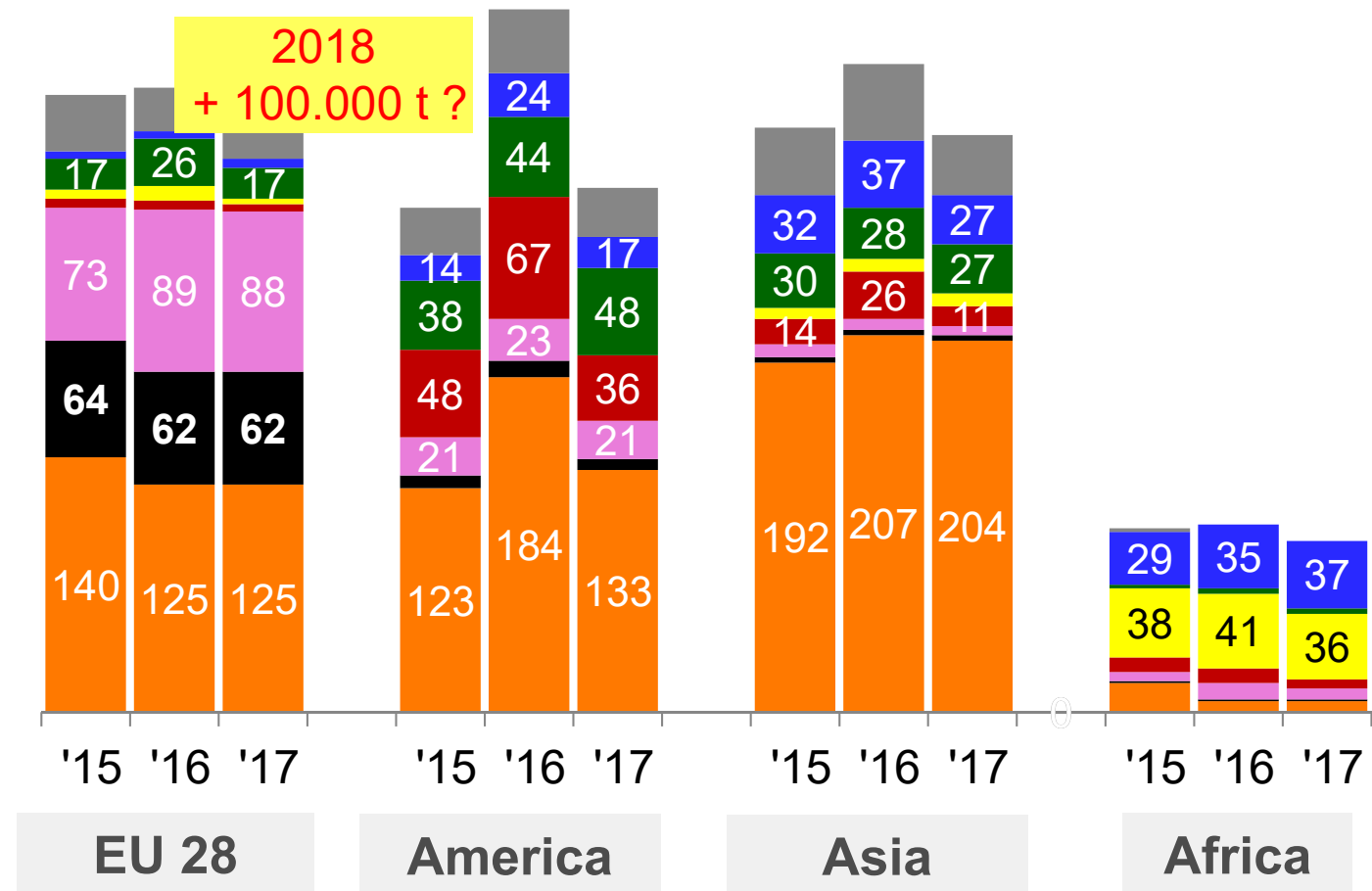
Golden

Red Del.

Pink Lady

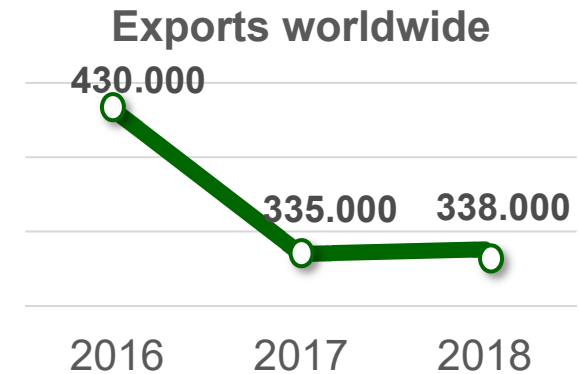
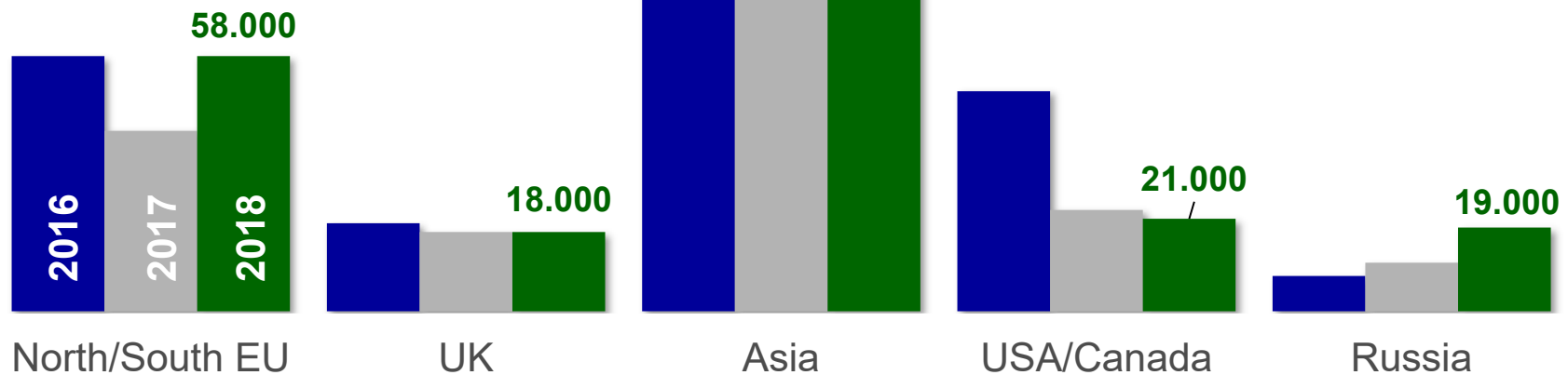
Braeburn

Gala



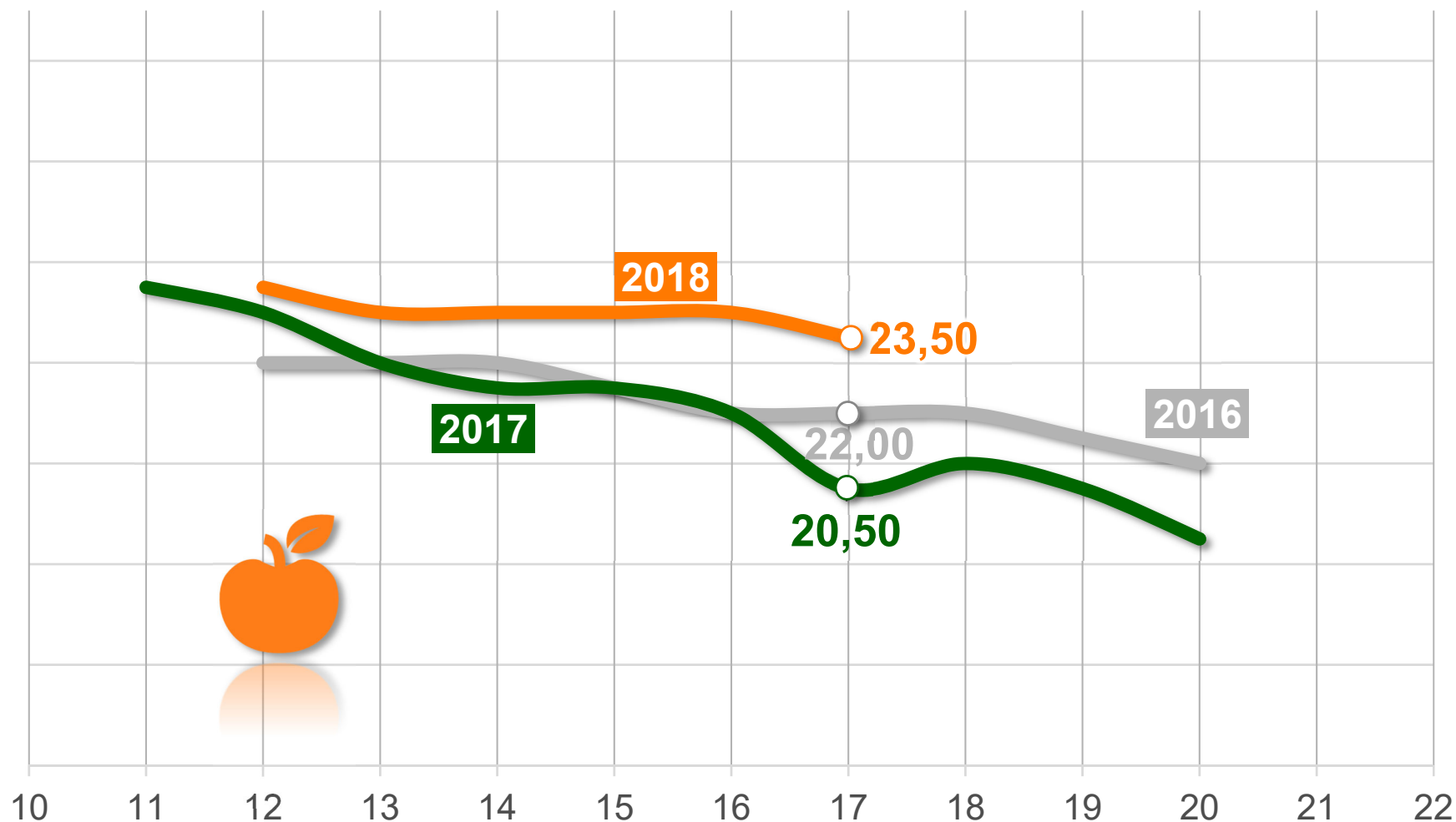
More exported to Europe

Exports of apples from the Southern Hemisphere, season up to week 17, in tons



Stable price on high level

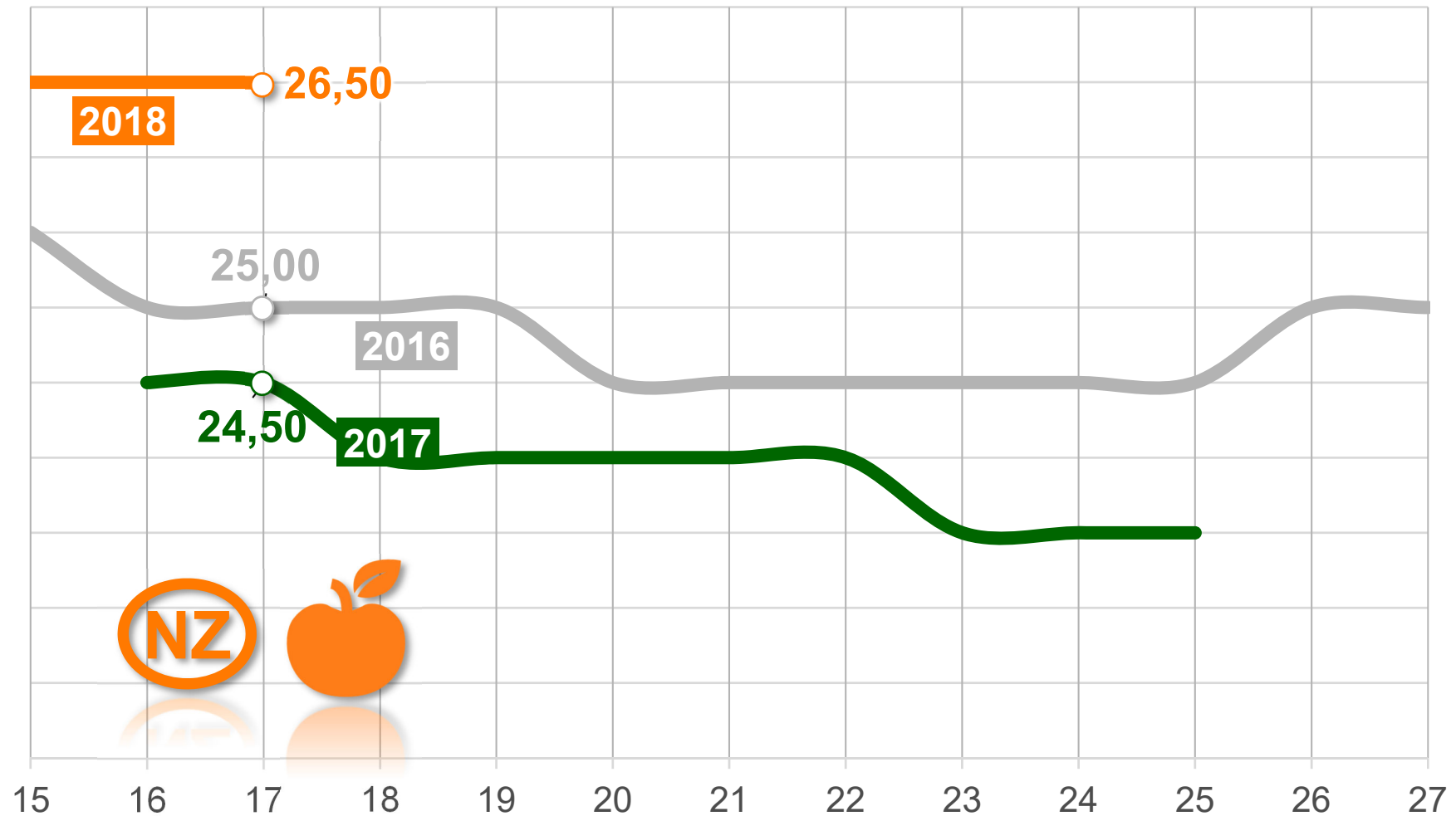
Average weekly FOT-price Europe of Gala/Tenroy from Chile in EUR per 18 kg-Carton



Prices ob record level



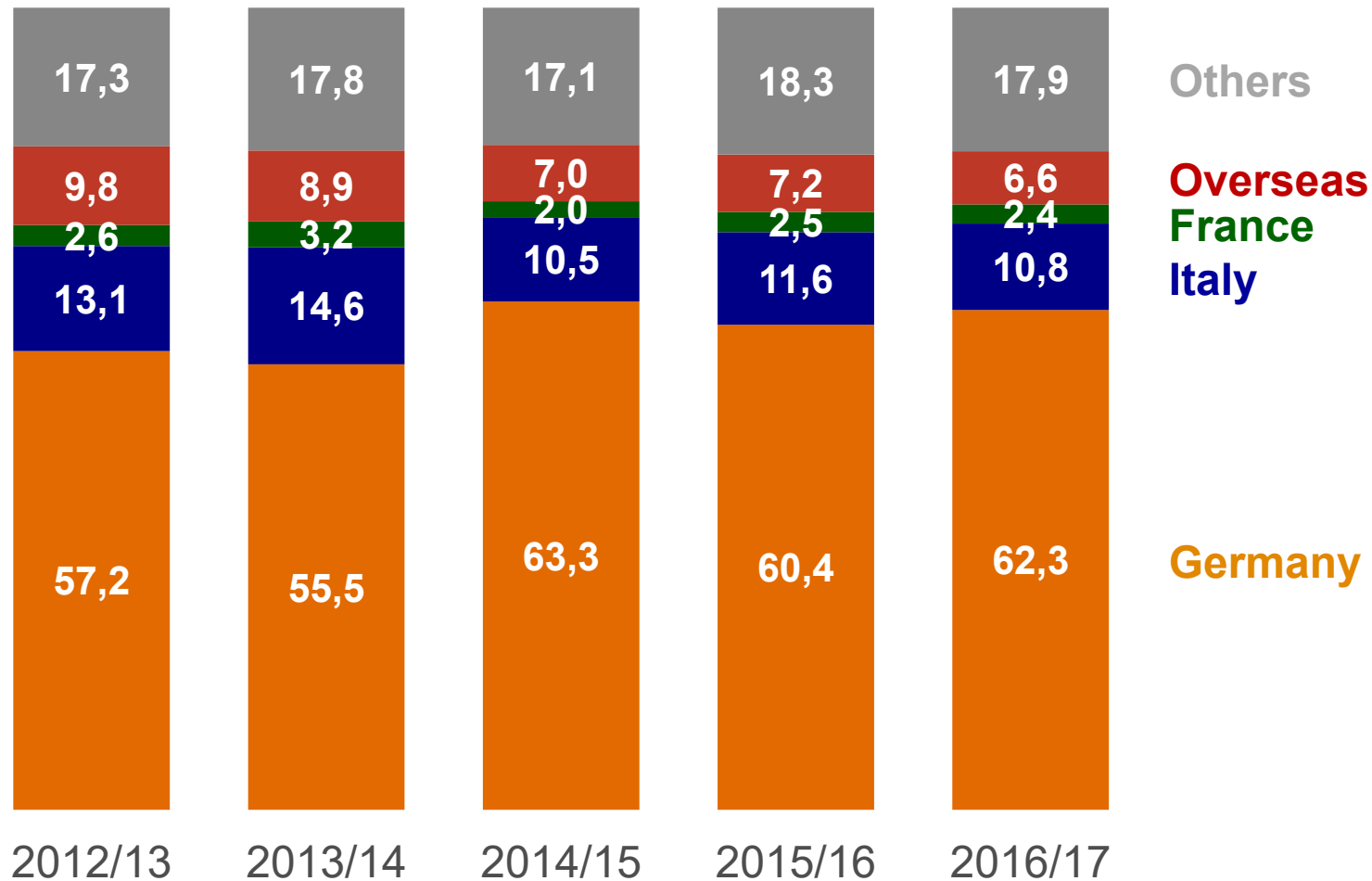
Average weekly FOT-price Europe of Gala/Tenroy from New Zealand in EUR per 18 kg-Carton



Less apples in previous years

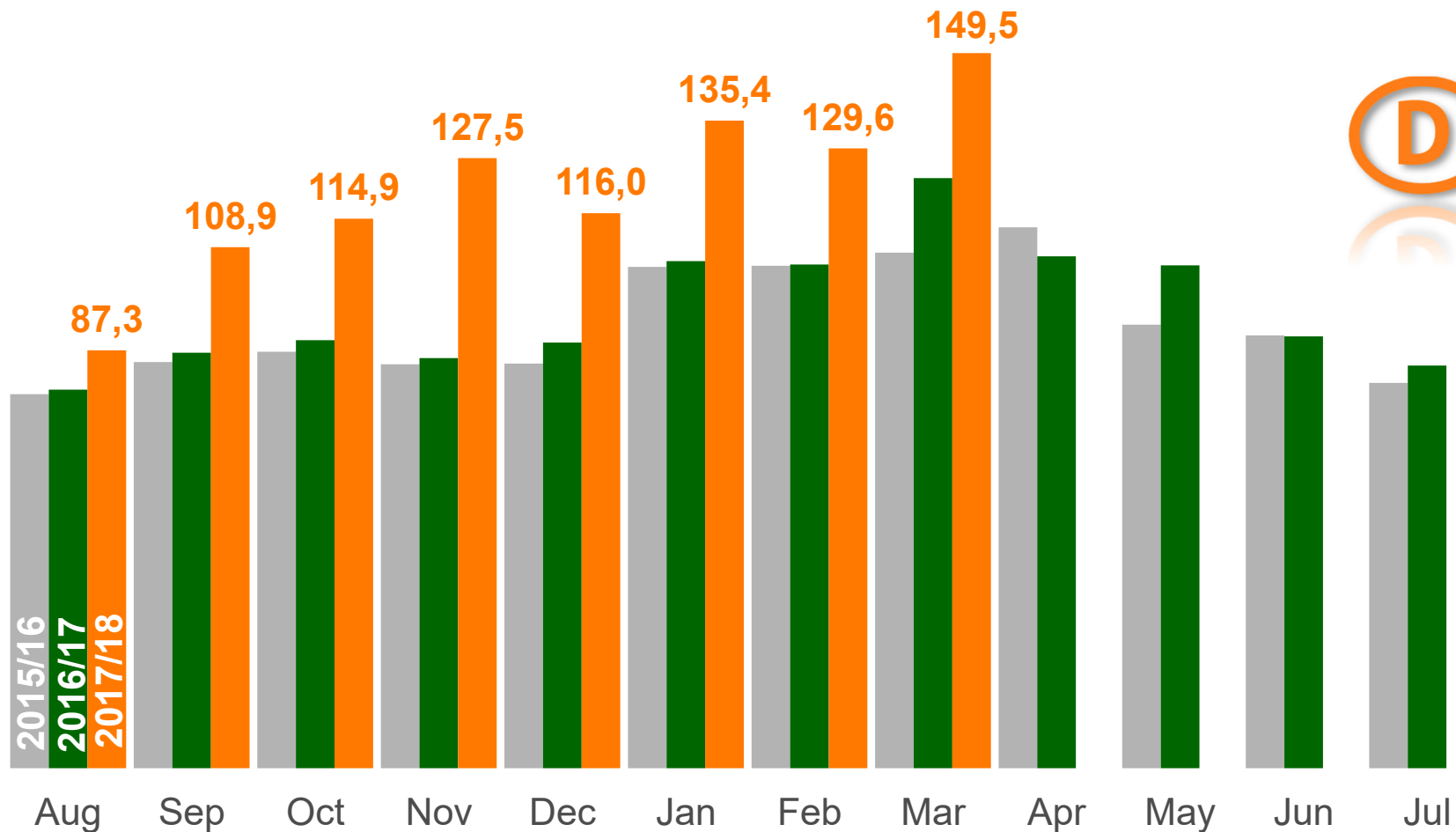


Apple consumption trend in Germany, country of origin, August to July, volume in %



Record turnover

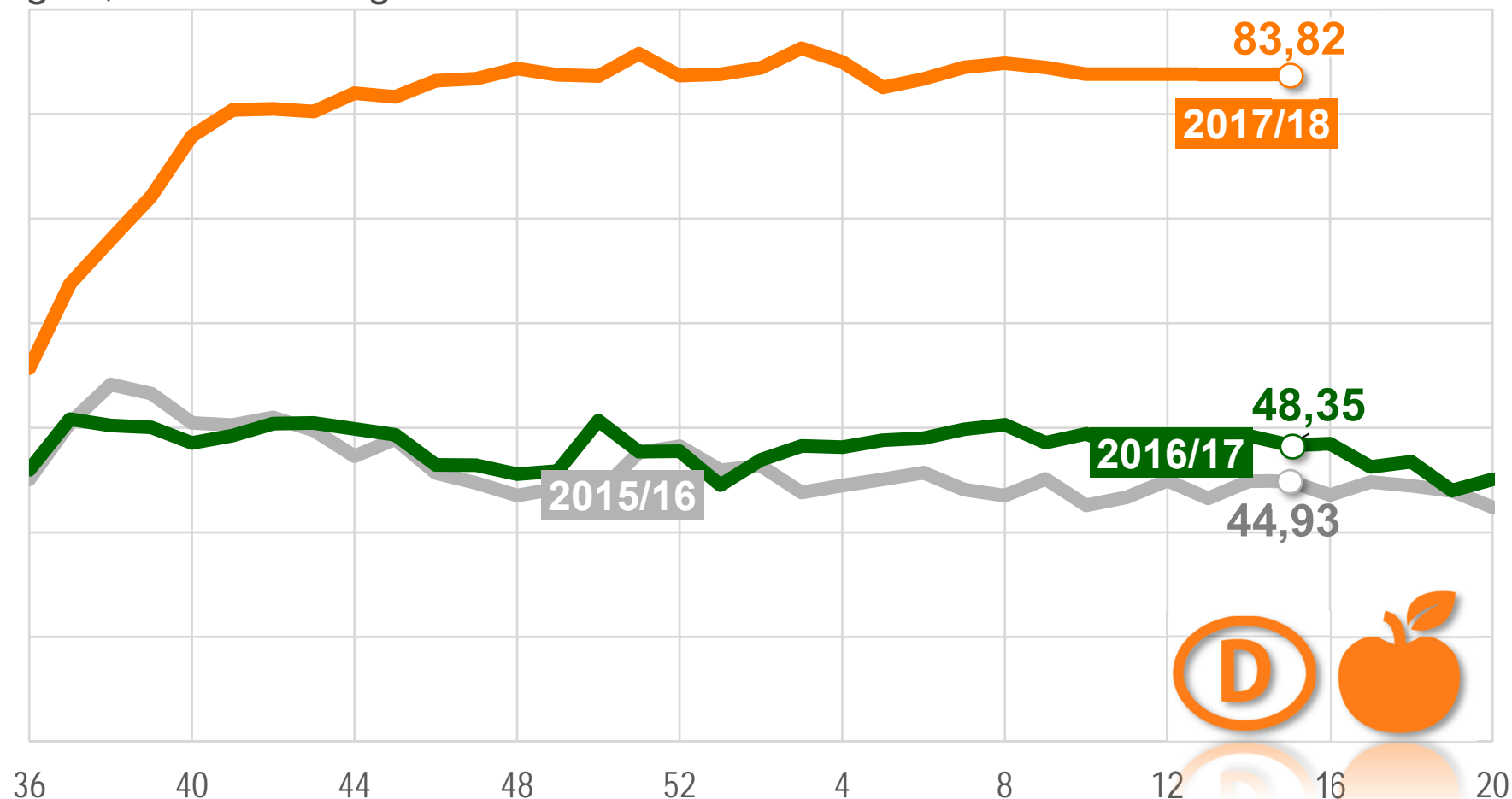
Monthly retail turnover for apples in Germany, in Mio. EUR



80 % higher prices

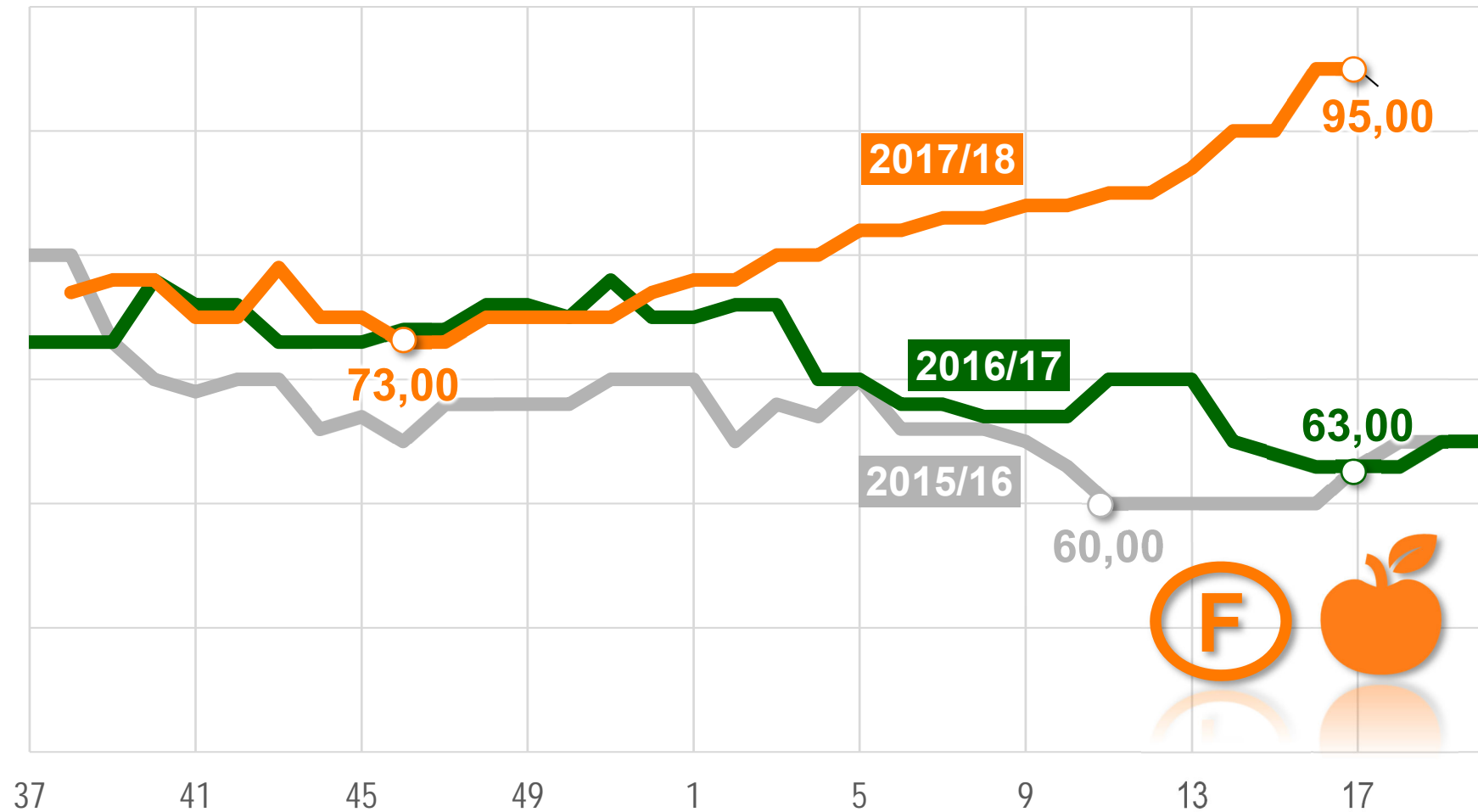


Weekly price ex region, total, class I, in Lower Elbe/Lake Constance region, in EUR/100 kg



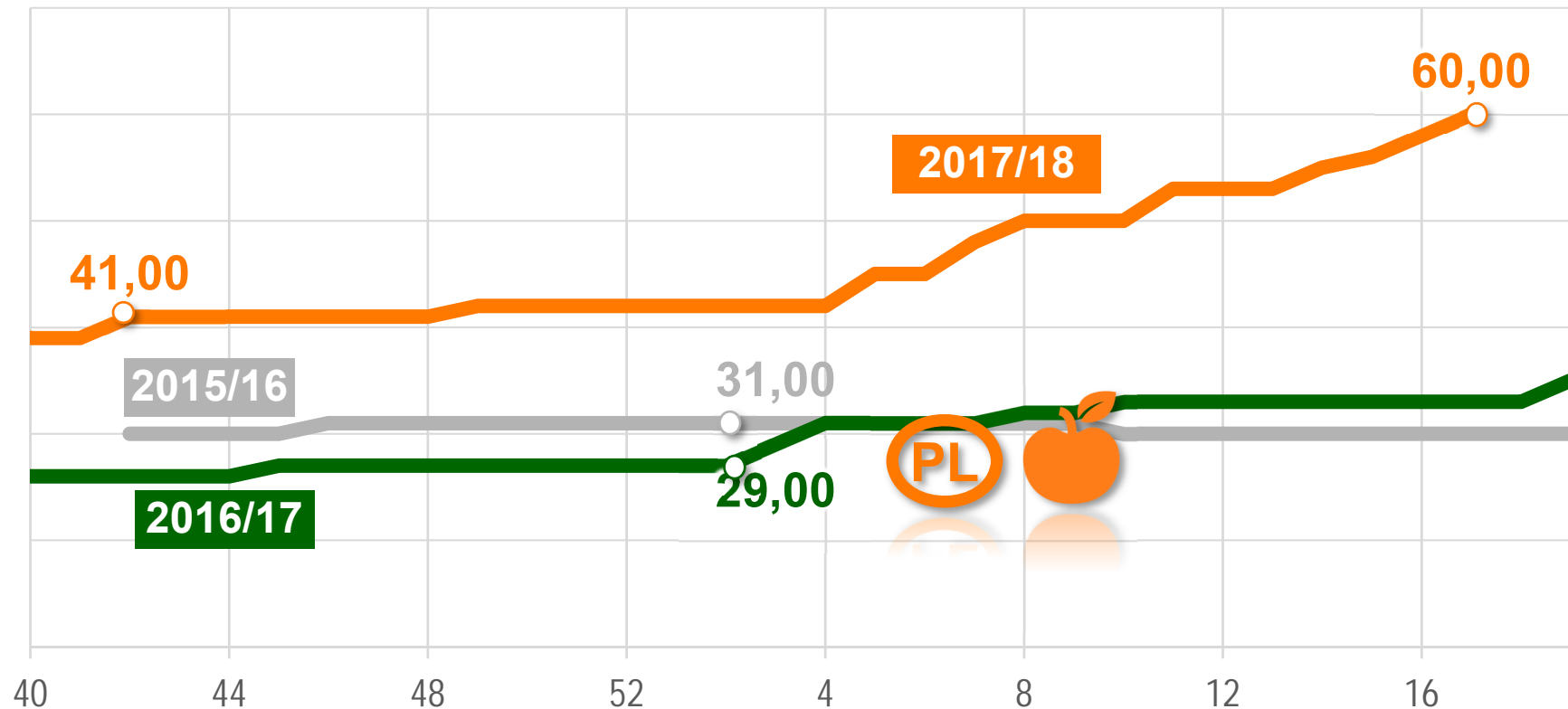
Strong increasing price

Weekly price ex region, Golden Delicious 70-75 mm, class I, in France
in EUR/100 kg



Record price for Jonagold

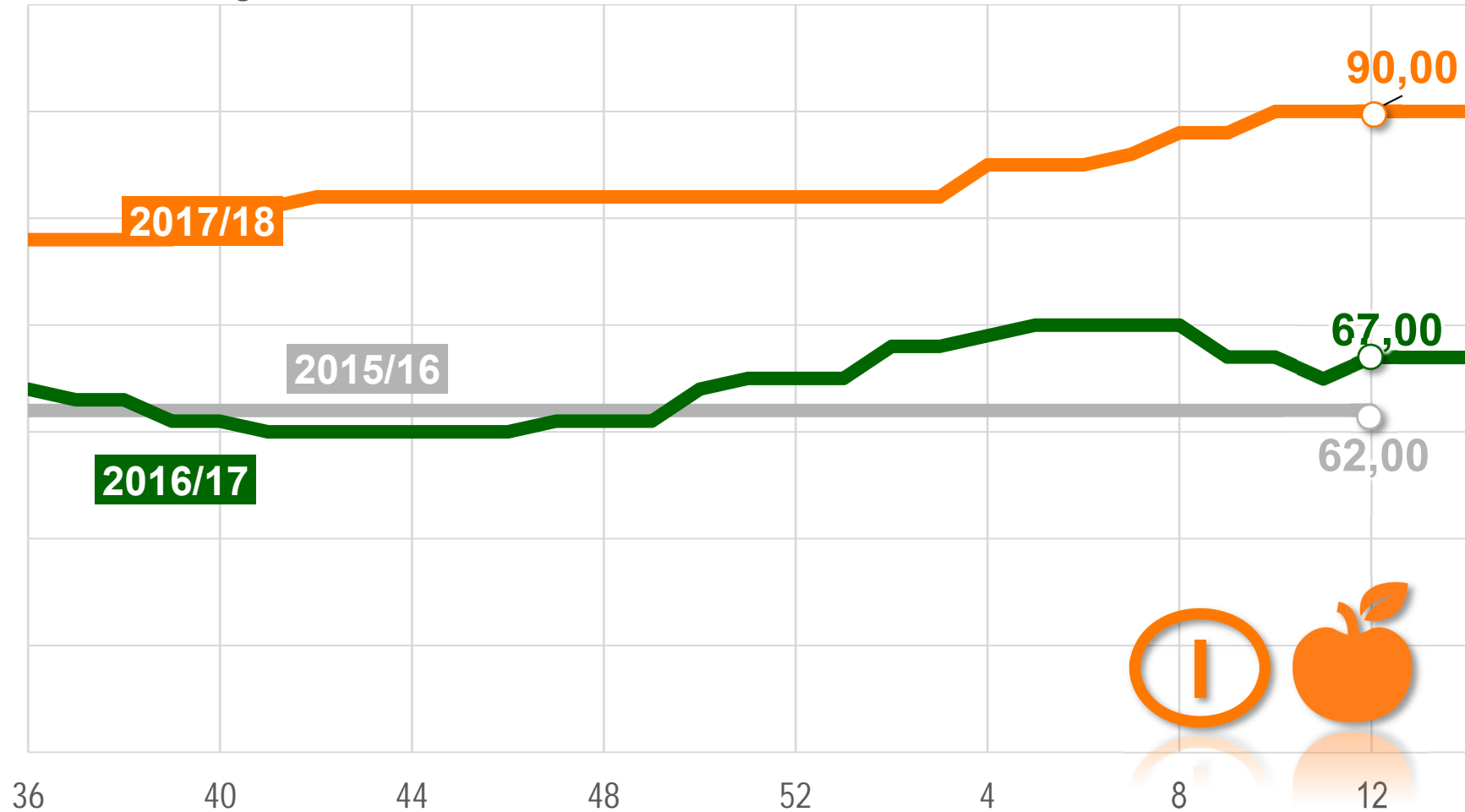
Weekly Polish producer price for Jonagold, class I, 70+ mm, EUR/ 100 kg



Increasing price in the last part of season

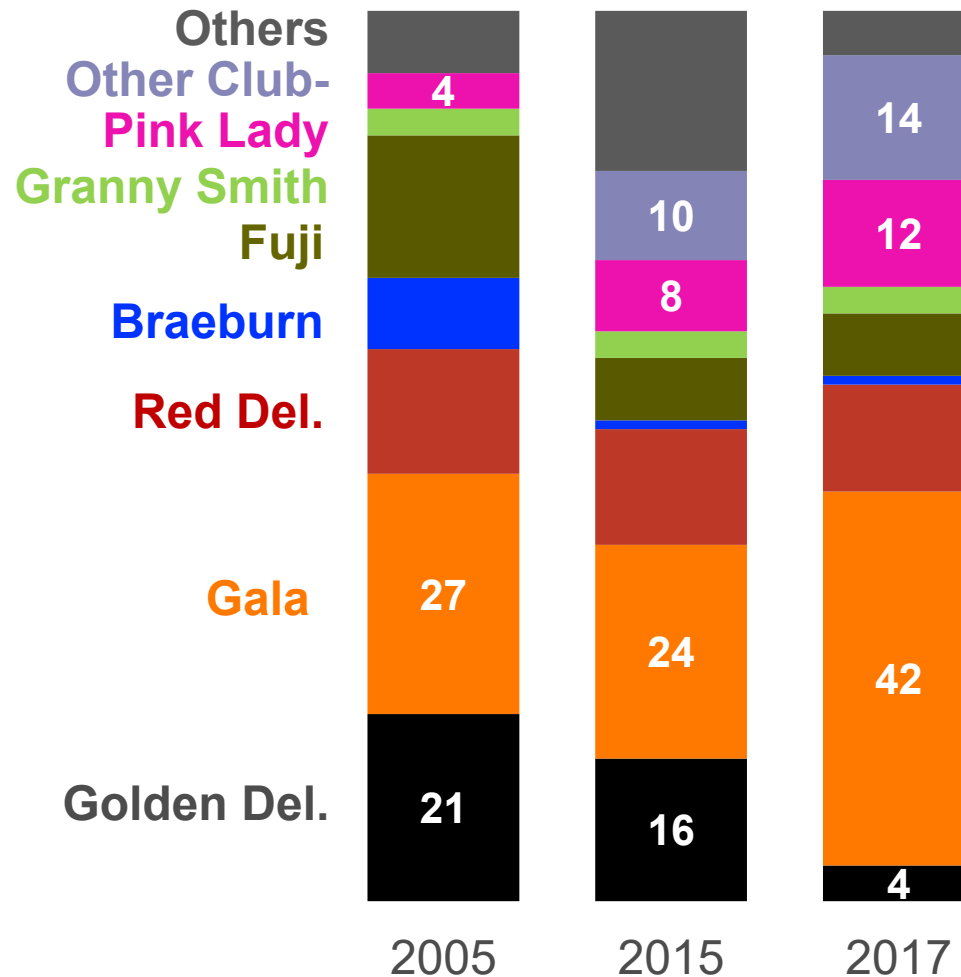


Weekly price ex region, Gala 70-75 mm, class 1, in South Tyrol
in EUR/ 100 kg



Planting boom in Gala

Varieties in South Tyrol (VOG/VI.P), planting in %



Club varieties in South Tyrol (VIP+VOG)

2016	starting	ha
Pink Lady	1998	827
Kanzi	2005	400
Jazz	2007	127
Envy	2012	99
Modi	2007	59
Evelina	2008	55
Ambrosia	2012	61
Rubens	2002	19
Yello	2015	??
Total		1.647

More consumption, stable price



Consumption Pink Lady in Germany,
volume (1.000 t), price (EUR/kg) and range of consumer (%)



Buying volume



Price



Range of
consumer



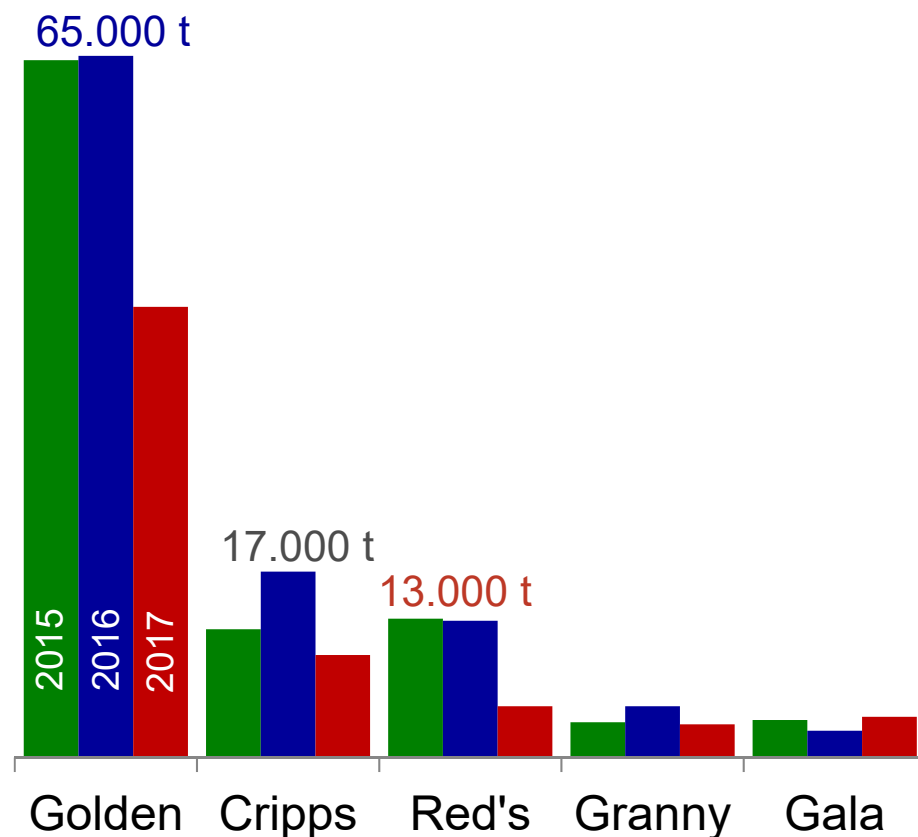
2012

2014

2016

2017

South Africa – Apple exports to African countries (1.000 t)

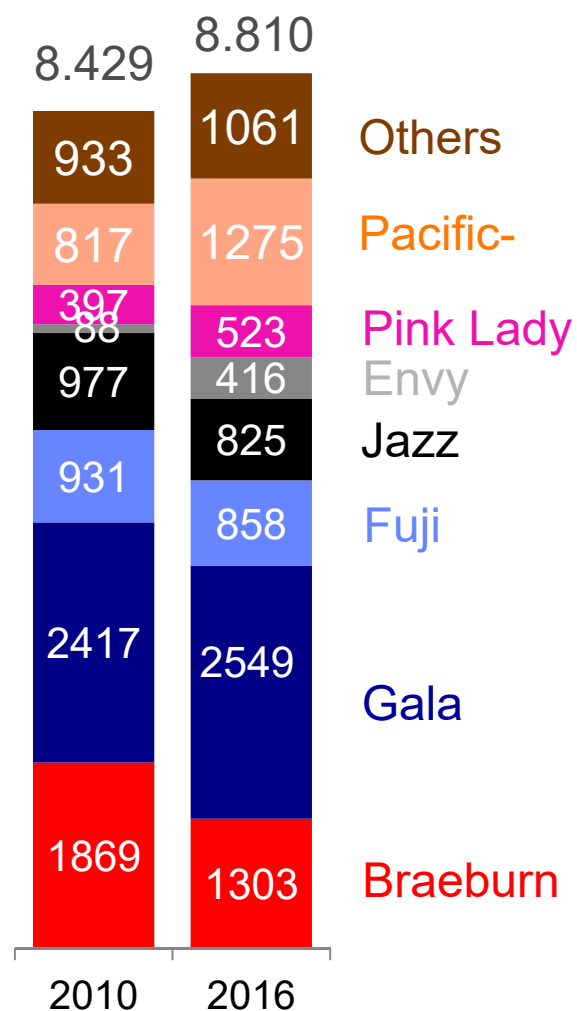


South Africa 2016 apple planting (%)

variety	0-3 age	4-10 age	11-15 age
Golden	18	21	16
Granny	9	7	9
Gala	17	19	26
Topred	5	10	9
Cripps	9	13	7
Fuji	9	18	16
Total	100	100	100

Changing varieties in New Zealand

Apples acreage in New Zealand, in ha



New Zealand apple exports until July, 1.000 t

1.000 t	2007	2011	2014	2016	2017
Asia (Far East)	38	69	87	115	103
EU	162	137	123	108	119
America	37	28	43	49	37
Mid. East	5	9	11	18	16
Total	246	256	274	297	275

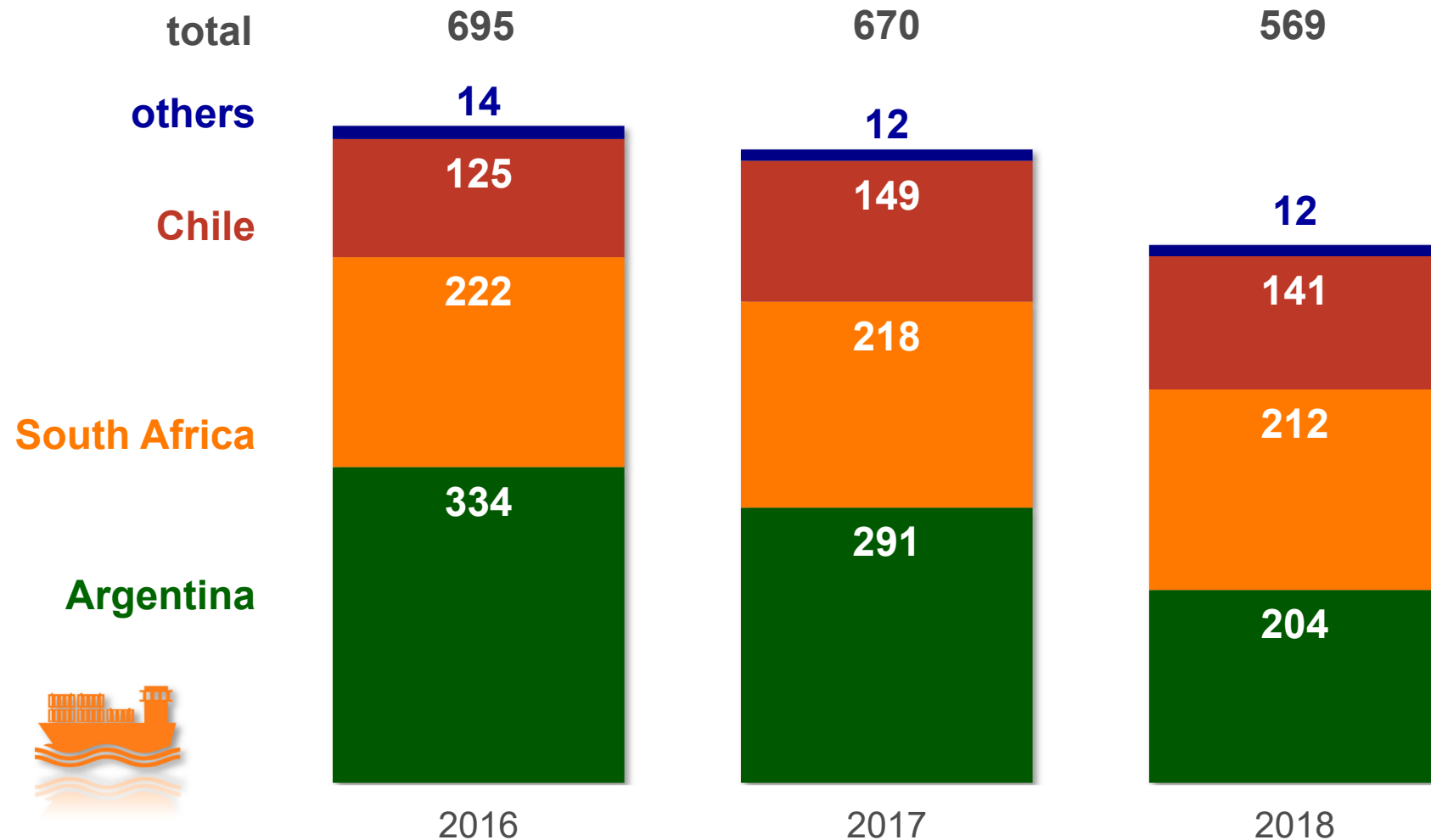
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2 Pear market – Loser oversea pears?

Much less, but Argentina not for sure

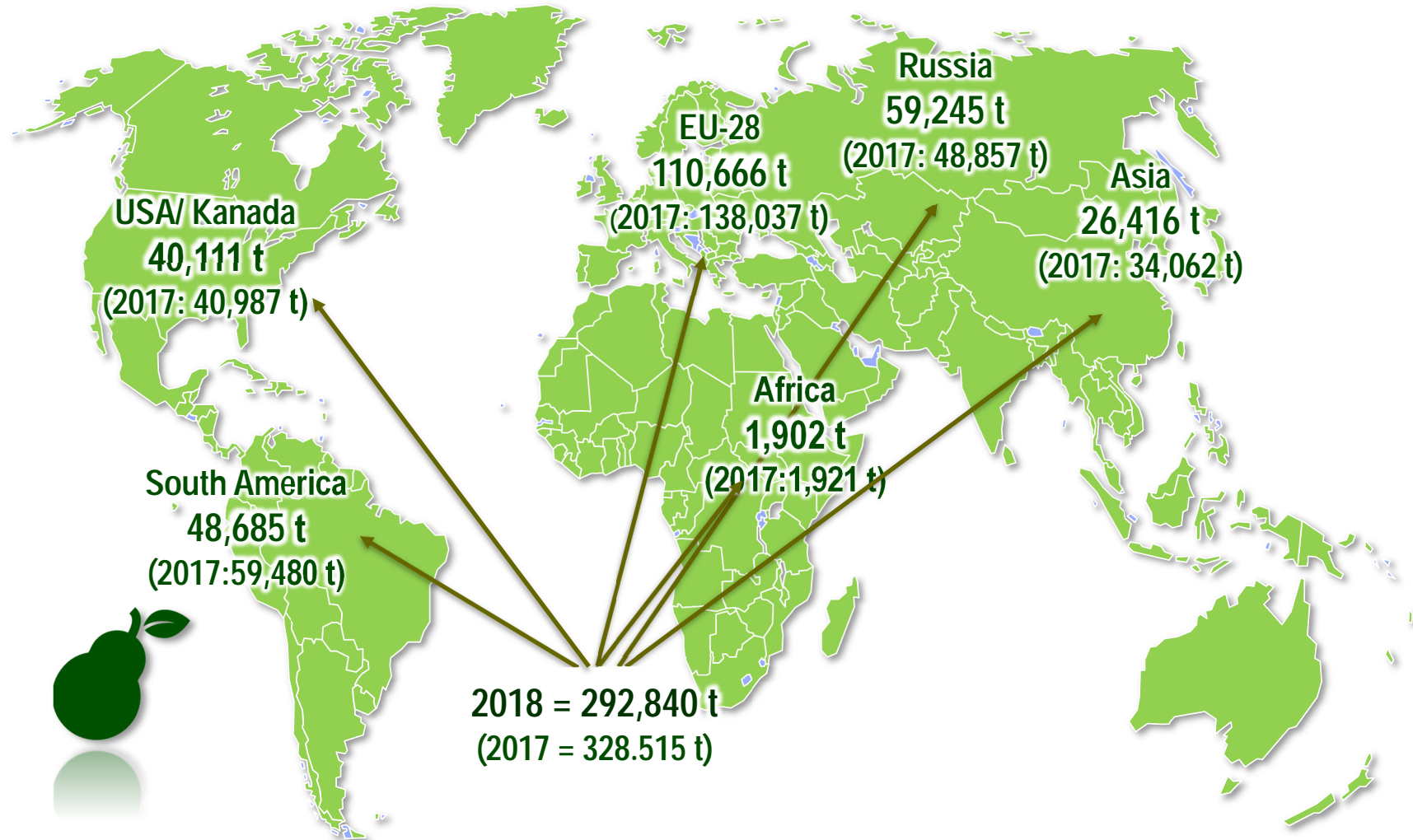
Expected exports of pears from oversea, in 1,000 t



Europe still most important

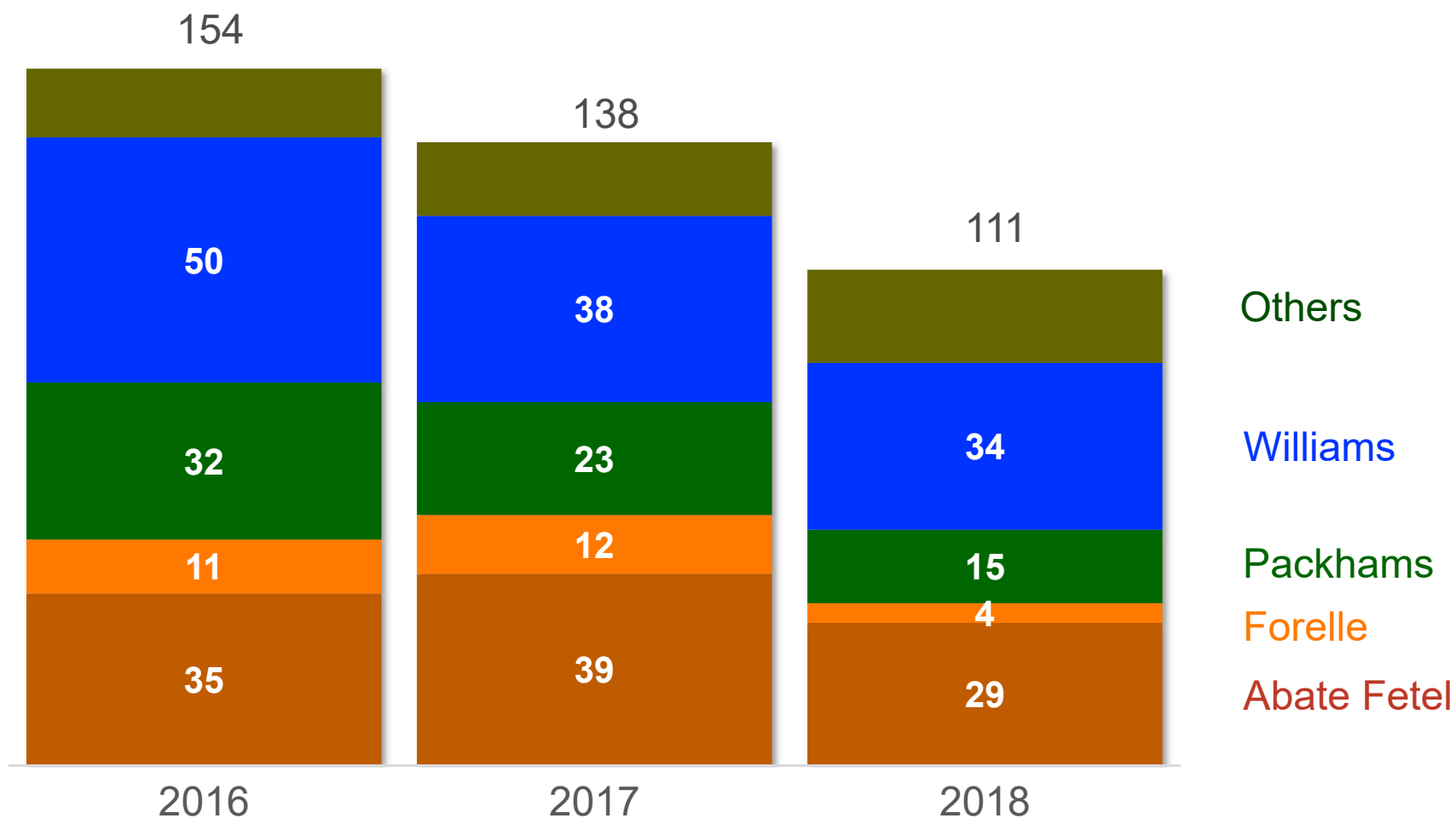


Exports of pears from the Southern Hemisphere to all destinations, cumulated up to week 17, in tons



Stable imports from Southern Hemisphere

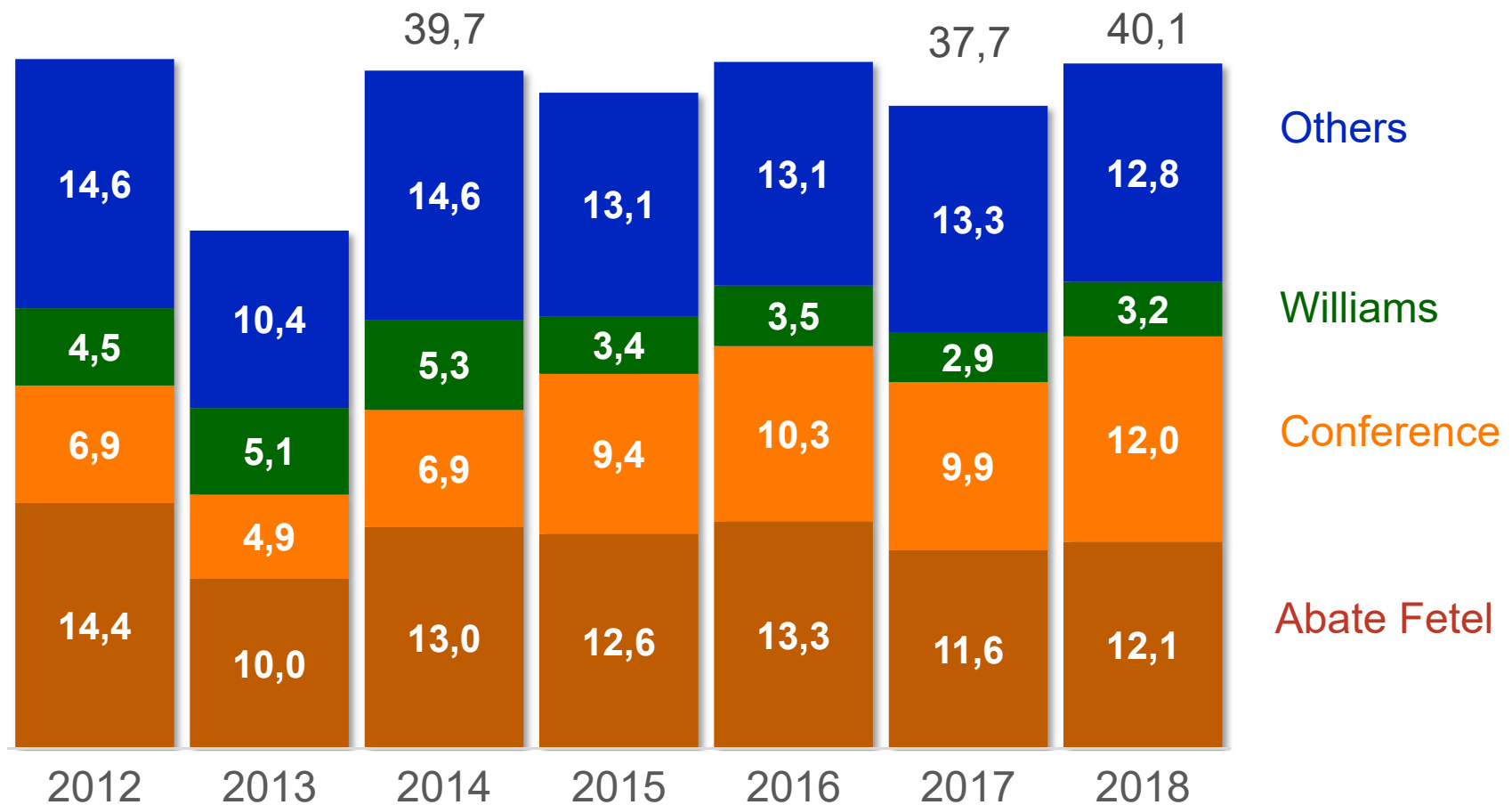
EU – Pear imports from Southern Hemisphere, till 17th week, in 1.000 t



Loser overseas pears



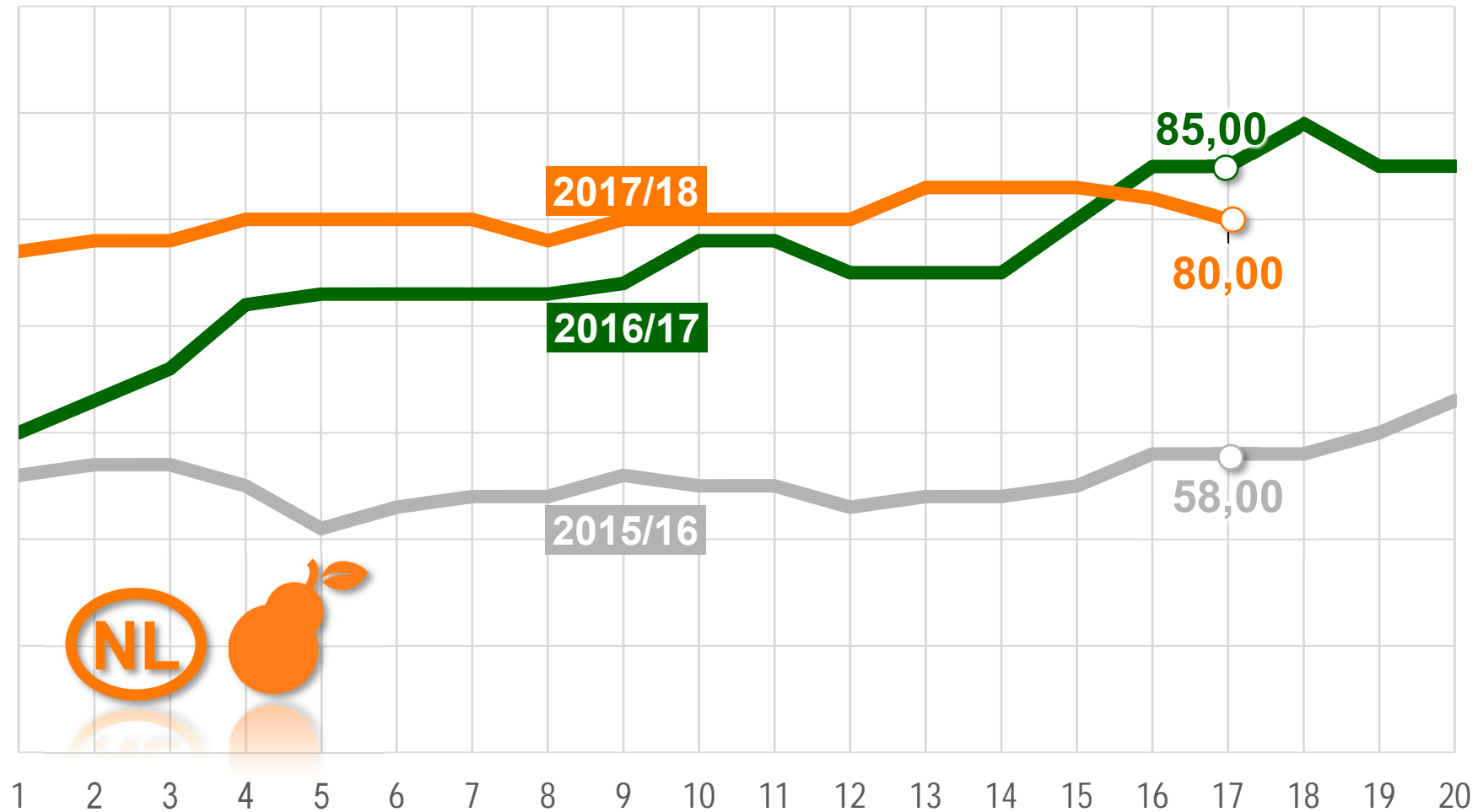
Pear consumption in Germany – January to March, in 1.000 t



Price limit reached?



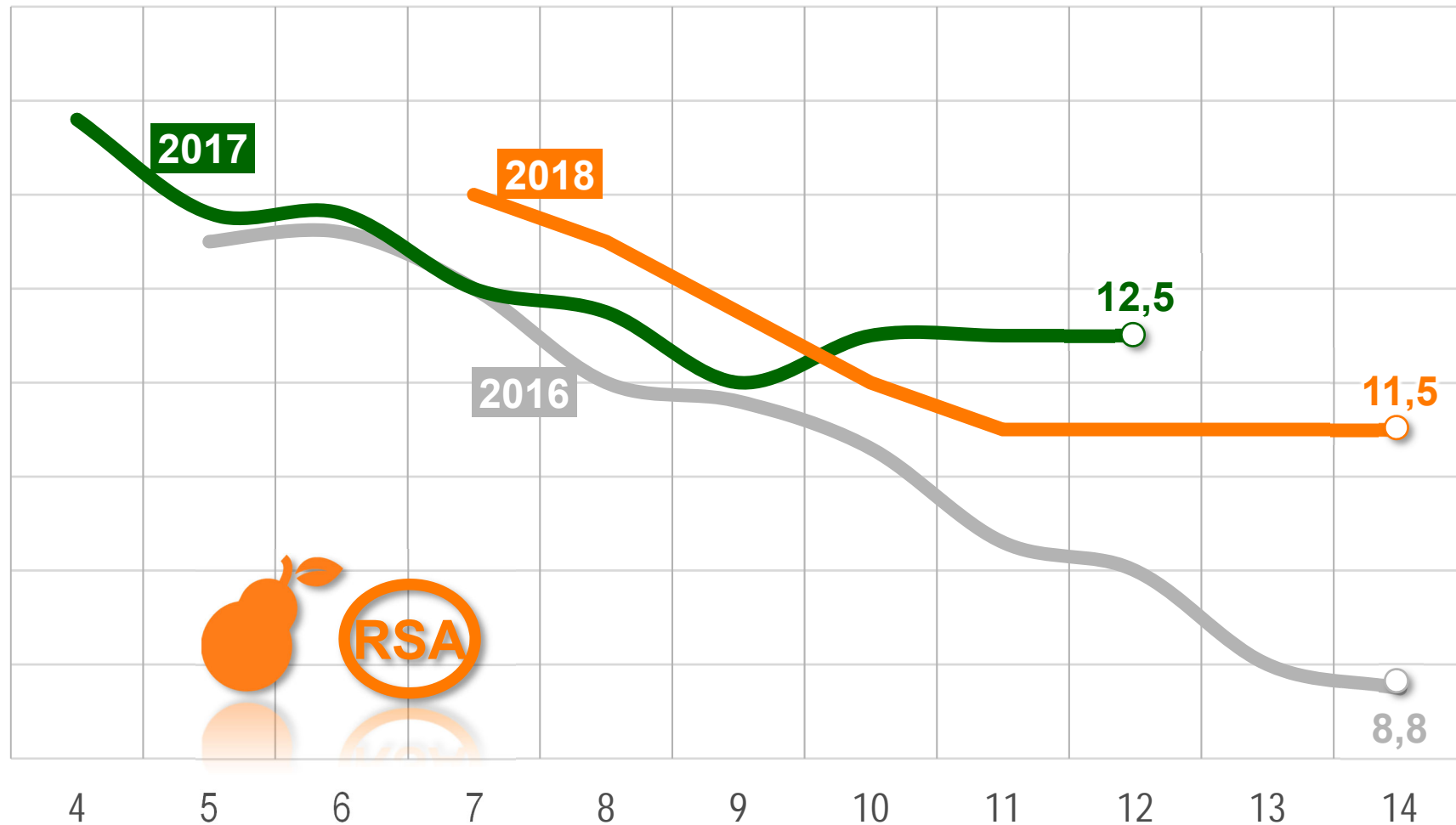
Weekly price ex region for Conference, class I, 65-75mm,
in the Netherlands in EUR/100 kg



Season not satisfactory



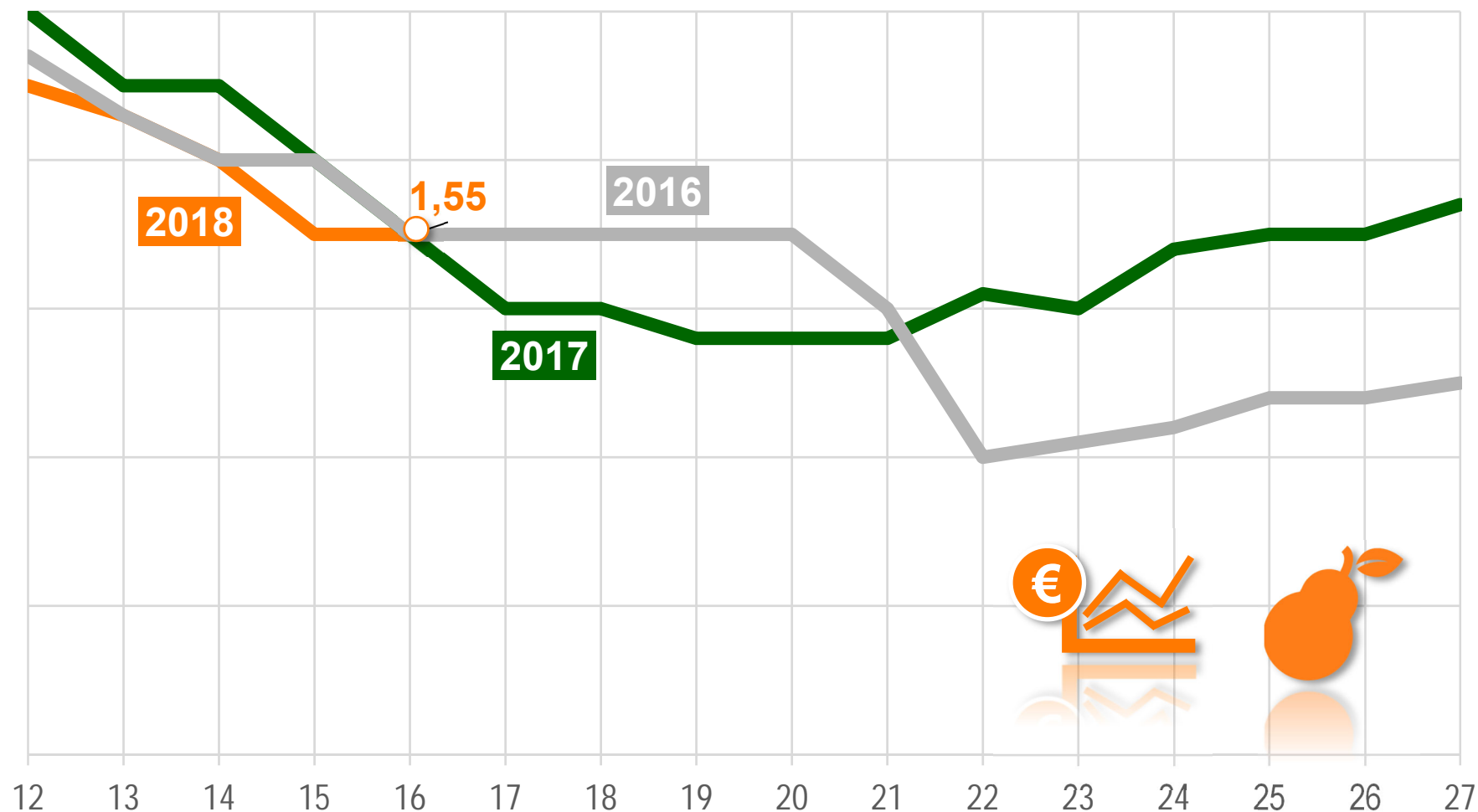
Weekly fot prices for Williams/Bon Chretien from South Africa in Europe
in EUR/12,5 kg



Prices for Abate Fetel decreasing



Weekly price for Abate Fetel Oversea, package 6,3-6,5kg, in EUR/kg



Thank you for your attention

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