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Review apples and pears season

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Freshfel -WAPA

EUROPE

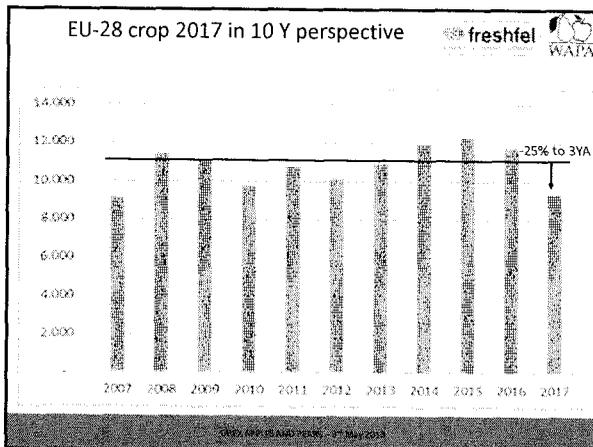
0102 APPLES AND PEARS - 07 May 2018

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Apples 2017-2018 Northern Hemisphere

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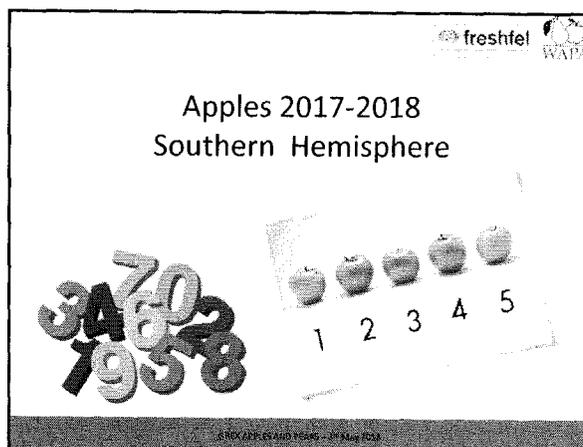
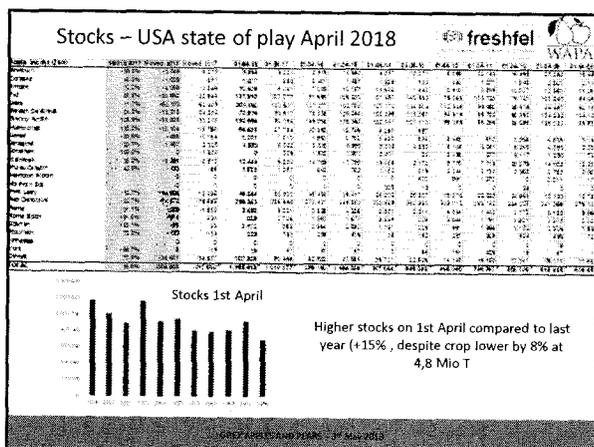
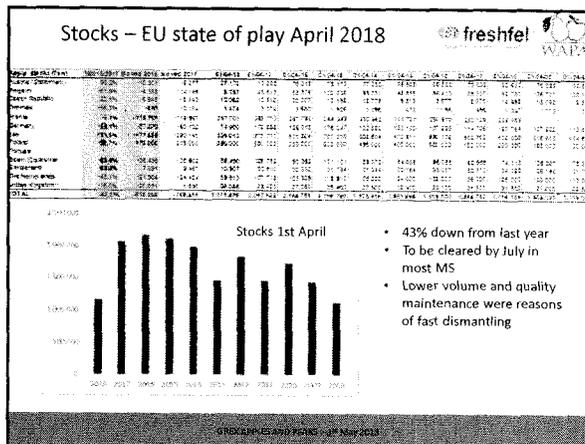
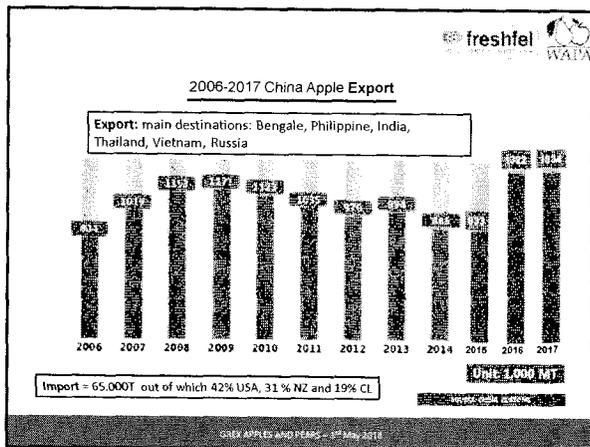
EU Production - Apples

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Country	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	F2017 (1)	(2)
Austria	159	188	189	189	187	155	159	177	40	87	88	82
Belgium	185	204	205	205	226	225	215	229	274	34	40	48
Croatia	49	86	79	82	118	148	87	101	38	84	39	2
Czech Rep	157	145	105	73	112	121	131	150	170	97	120	12
Denmark	28	24	21	20	18	23	28	24	24	16	21	20
France	1,526	1,861	1,928	1,701	1,458	1,575	1,454	1,521	1,555	1,424	6	16
Germany	1,041	1,071	812	982	872	804	1,116	972	1,523	588	59	87
Greece	231	224	254	206	242	238	245	242	259	202	18	17
Hungary	583	712	680	571	704	565	618	672	480	558	8	19
Italy	2,154	2,027	2,178	2,287	1,978	1,122	1,452	1,264	1,272	1,405	26	23
Latvia	54	15	12	8	8	15	10	6	10	5	10	44
Lithuania	74	74	81	69	39	40	27	40	50	44	12	7
Netherlands	272	170	204	419	243	213	252	236	319	204	126	32
Poland	2,039	2,085	1,985	2,020	2,068	1,195	2,782	1,676	4,186	1,270	26	27
Portugal	219	272	281	264	221	284	272	239	263	214	18	6
Romania	158	190	221	412	361	187	330	324	207	369	24	26
Slovakia	42	48	32	27	36	42	48	44	17	15	12	16
Slovenia	119	84	81	73	45	50	56	71	12	8	82	48
Spain	1,625	1,770	1,602	1,201	1,311	1,618	1,561	1,452	1,414	1,219	17	2
Sweden	18	12	20	17	14	17	38	21	20	16	10	8
UK	251	310	274	236	182	244	253	243	244	216	18	13
Total:	11,081	11,908	8,142	11,348	10,586	10,819	12,904	13,121	14,416	9,195	32	158

Prognosfruit forecast : 9.343.000 T

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Southern Hemisphere apples Outlook (Feb 2018)

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**Southern Hemisphere
Apple Production by Country**

Apples x 1000 tons

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	F2018 (1)	(2)
Argentina	935	960	1.048	861	920	830	824	755	704	620	-9%
Australia	263	258	240	275	259	279	269	284	300	304	+2%
Brazil	1.920	1.250	1.250	1.384	1.343	1.155	1.145	926	1.029	1.185	+1%
Chile	1.410	1.055	1.124	1.800	1.940	1.970	1.788	1.631	1.870	1.750	-6%
New Zealand	400	442	513	475	550	470	518	579	598	560	-1%
South Africa	747	770	764	833	807	708	824	802	840	871	+1%
Total	5.772	5.240	5.827	6.425	6.485	5.772	5.478	6.314	6.596	6.318	-4%

(1) Percentage change from 2017 and 2018
(2) Percentage change between 2017 and 2018

(1) 2018 APPLES AND PEARS - 23rd May 2018

Southern Hemisphere apples Outlook (Feb 2018)

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**Southern Hemisphere
Apple Production by Variety**

Apples x 1000 tons

Variety	2009	2010	2011	2012	2013	2014	2015	2016	2017	F2018 (1)	(2)
Gravenstein	208	212	242	287	307	307	342	329	314	312	-2%
Golden Delicious	335	328	318	376	354	350	423	396	382	400	+1%
Fuji	463	720	689	626	570	748	700	436	441	391	-10%
Galva	1.424	1.138	1.052	1.405	1.883	1.473	1.190	1.133	1.033	1.037	-6%
Golden Delicious	190	188	199	232	220	280	330	324	294	210	-9%
Discovery Smith	307	106	688	713	570	340	428	508	582	589	+6%
Red Delicious	1.800	262	1.140	370	458	305	330	353	308	317	-13%
Others	461	524	644	430	321	515	426	487	513	495	-2%
Total	5.772	5.240	5.827	6.425	6.485	5.772	5.478	6.314	6.596	6.318	-4%

(1) Percentage change from 2017 and 2018
(2) Percentage change between 2017 and 2018

(1) 2018 APPLES AND PEARS - 23rd May 2018

Southern Hemisphere apples Outlook (Feb 2018)

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**Southern Hemisphere
Apple Exports by Country**

Country (MT)	2014	2015	2016	2017	F2018	(2)	(3)
Argentina	145.900	178.114	101.200	110.450	88.360	-20%	-20%
Australia	1.800	3.600	5.156	4.400	1.817	7%	9%
Brazil	44.754	40.116	80.817	55.835	60.000	3%	13%
India	100.522	611.758	741.593	508.595	730.613	5%	7%
New Zealand	110.065	130.519	148.213	118.521	178.054	12%	11%
South Africa	339.266	314.292	425.823	417.974	381.374	-4%	-8%
Total	1.875,312	1,887,594	1,823,792	1,725,955	1,879,818	10%	7%

(1) 2018 APPLES AND PEARS - 23rd May 2018

Evaluation apples market

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- Stocks: on average 43 % lower than last year in April. Large players (PL- IT) up to 50% => Outlook : stocks to be cleared in July –also taking into account poor storage quality in many MS
- Prices: Much improved compared to previous years, e.g. average price for jonagold in PL cat 1 between 0,5 € to 0,6 € compared to 0,35 € last year
- Intra trade: stable during the first part of season, to decline in 1st sem 2018 due to shortage

Auto-Proc	Self-Proc	Self-Proc	Self-Proc
2018	1.043.282,00	369.661,99	1.856.024,78
2017	1.72.240,80	292.815,50	387.741,10
2016	1.18.374,69	178.842,85	220.963,29
2015	130.730,40	134.282,20	159.844,20
2014	90.185,00	21.497,80	42.552,80
2013	92.733,50	60.513,80	106.852,30
2012	45.678,00	35.903,10	28.173,20

- Export (Aug-Jan) : -45% :to the East (RU,BU, and North Africa) => further down in 2018
- Import SH : stable so far (comparison based on Jan-April)

2018	2017	2016	2015
Export	1.871,00	1.187,00	1.114,00
Import	1.421,00	4.336,00	10.188,00
Self-Proc	6.277,00	2.769,00	2.719,00
Others	1.229,00	16.027,00	17.123,00
2018	1.258,00	1.474,00	2.954,00
Total	47.897,00	23.084,00	32.987,00

(1) 2018 APPLES AND PEARS - 23rd May 2018

Pears 2017-2018 Northern Hemisphere

EU APP BOARD PEARL - 17 May 2018

EU-28 crop 2017 in 10 Y perspective

2017 : 2.2 Mio T

Y2017 in perspective	
2.345	F2017
2.337	F2016
2.383	F2015
2.173	2016

EU APP BOARD PEARL - 17 May 2018

EU Production - Pears

Country	2008	2009	2010	2011	2012	2013	2014	2015	2016	F2017	(1) (2)
Belgium	170	307	285	258	226	197	84	219	122	562	6.15
Croatia	2	5	8	8	2	3	2	2	1	6	481.22
Czech Rep	1	0	1	3	0	0	0	12	7	4	17.78
Denmark	1	1	0	0	0	0	0	0	0	1	17.15
France	117	252	354	379	428	398	353	358	328	121	14.9
Germany	30	52	38	47	34	34	45	41	35	35	40.54
Greece	55	43	34	36	47	50	37	60	47	44	11.18
Hungary	19	42	36	21	25	36	45	33	39	48	2.8
Italy	719	652	686	574	640	740	754	754	821	738	8.1
Luxembourg	1	0	0	0	0	0	0	0	0	0	23.61
Netherlands	179	351	274	240	166	227	348	340	374	226	15.6
Poland	40	30	42	45	41	41	48	48	55	47	27.38
Portugal	708	598	572	474	435	482	283	329	412	486	88.24
Romania	11	24	23	23	14	24	17	15	14	16	11.8
Slovenia	1	1	1	1	0	1	0	1	1	1	80.48
Slovenia	4	6	6	4	1	1	1	1	1	1	17.48
Spain	478	429	458	481	255	403	464	348	311	337	1.8
Sweden	1	2	1	2	1	1	1	1	1	1	14.14
UK	21	21	21	21	21	21	21	21	21	21	8.2
Total	2.148	2.883	2.376	2.482	2.083	2.329	2.426	2.394	2.371	2.368	2.4

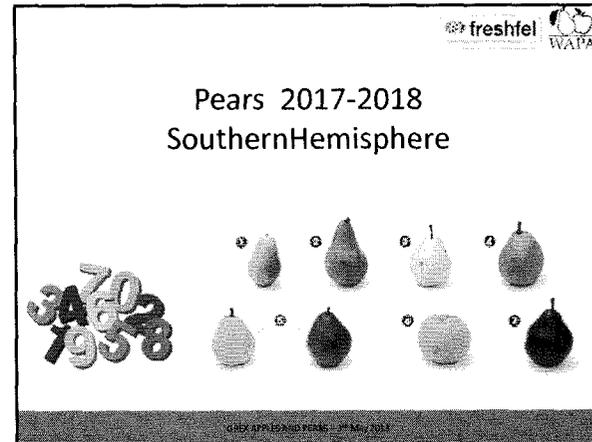
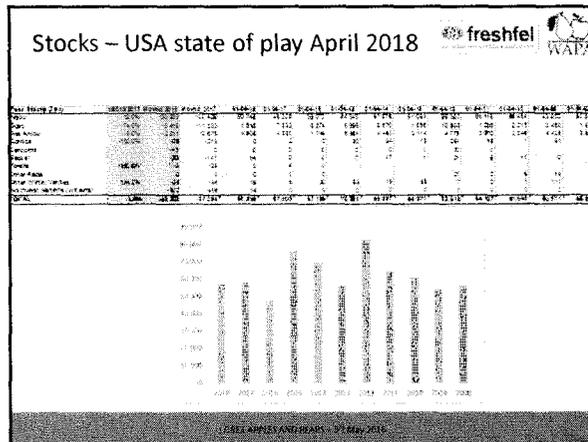
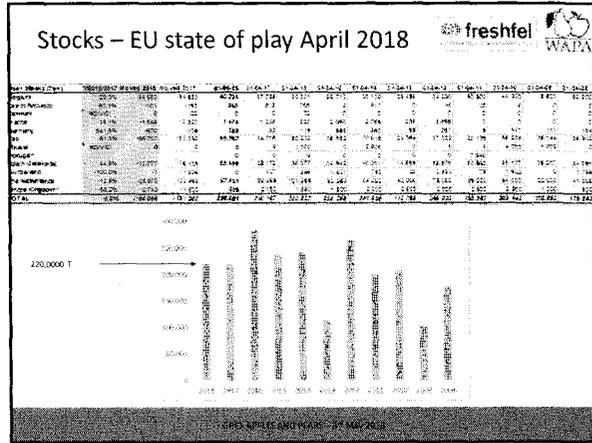
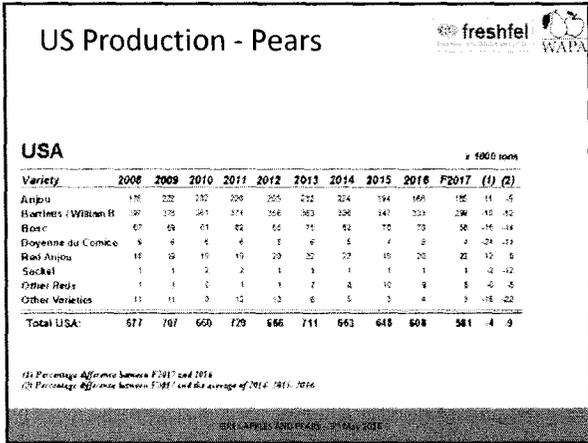
Prognosfruit forecast : 2.148.000 T

EU APP BOARD PEARL - 17 May 2018

EU Production - Pears

Variety	2008	2009	2010	2011	2012	2013	2014	2015	2016	F2017	(1) (2)
Ashley F	245	325	324	423	296	204	352	232	296	428	15.8
Bianquilla	52	56	41	78	59	54	49	44	30	46	13.2
Conférence	816	825	822	925	832	834	852	847	910	865	7.2
Cristina Frollini	107	126	85	59	77	88	56	79	47	72	13.8
Doyenne du Comice	82	146	87	127	50	81	84	87	81	88	25.29
Durondelle	6	8	8	7	5	5	8	5	3	1	17.48
Guyot	18	128	82	90	73	50	37	74	36	60	12.4
Kaiser	26	65	41	80	39	54	23	45	30	42	12.8
Pascalisano	21	12	18	17	17	14	11	12	11	12	18.16
Rocha	116	107	111	229	110	182	253	148	113	186	16.24
Wilhelm BC	285	312	299	232	252	282	278	282	287	287	1.8
Other	108	182	373	328	248	346	308	330	290	243	10.17
Total	2.148	2.883	2.376	2.482	2.083	2.329	2.426	2.394	2.371	2.368	2.4

EU APP BOARD PEARL - 17 May 2018



Southern Hemisphere pears Outlook (Feb 2018)

**Southern Hemisphere
Pear Production by Country**

Pears x 1000 tons

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018 (1)	(2)
Argentina	896	759	843	821	821	774	810	830	811	826	30
Australia	127	137	134	124	126	107	134	150	162	116	14
Chile	174	170	194	188	201	170	180	177	148	143	-5
New Zealand	12	11	11	9	10	10	12	12	11	12	8
South Africa	268	358	260	301	279	290	416	420	428	429	14
Total	1577	1414	1539	1489	1583	1480	1528	1398	1309	1117	20

(1) Percentage difference between F2018 and 2017
 (2) Percentage difference between F2018 and the average of 2013 - 2016 - 2017

Southern Hemisphere pears Outlook (Feb 2018)

**Southern Hemisphere
Pear Production by Variety**

Pears x 1000 tons

Variety	2009	2010	2011	2012	2013	2014	2015	2016	2017	F2018(1)	(2)
Beurre d'Anjou	39	144	36	70	88	53	87	111	112	118	10
Comice	85	80	104	107	116	100	132	130	130	130	17
D'Anjou's T	129	69	106	100	100	100	100	100	100	100	14
Williams BC	150	159	140	151	160	164	174	171	169	174	20
Others	1027	1176	1117	1051	1042	1057	1057	1056	1056	1056	15
Total	1577	1414	1539	1489	1583	1480	1528	1398	1309	1117	20

(1) Percentage difference between F2018 and 2017
 (2) Percentage difference between F2018 and the average of 2013 - 2016 - 2017

Southern Hemisphere pears Outlook (Feb 2018)

**Southern Hemisphere
Pear Exports by Country**

Country (MT)	2016	2015	2016	2017	F2018	(1)	(2)
Argentina	438,500	341,030	334,200	281,000	209,700	-30%	-37%
Australia	700	10,000	9,841	8,212	8,852	8%	-5%
Chile	116,131	139,310	135,022	148,849	140,730	-5%	2%
New Zealand	4,972	4,561	4,560	3,595	4,186	16%	-1%
South Africa	203,112	192,009	222,192	218,426	211,878	-3%	0%
Total	763,425	697,910	695,821	678,682	583,346	-35%	-17%

Closing remarks

- Season 2017/2018 with steady prices due to lower volume. Qualitative issue influencing sales due to storage conditions.
- Early end of the season, no massive flow of produce so far from SH
- Favourable climatic conditions so far for the 2018/2019 crop. Initially, a late start was identified, but recently (mainly in Northern and Central region) speed up of flowering.
- Bumper crop expected. Need to look at all channels for the next year: fresh market, processing market and export markets (addressing SPS issues, opening new market and resuming sales left aside during 2017/2018).

PROGNOSFRUIT 2018: WARSAW 8-10 AUGUST 2018
 Information and registration soon available on www.prognosfruit.eu

