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Positive outlook for 2011 EU Apple and Pear Production

Report Categories:

Fresh Deciduous Fruit

Organic Products

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Report Highlights:

On August 5 & 6, 2011, the World Apple and Pear Association (WAPA) presented the 2011 EU apple and pear crop forecast at the 35th Prognosfruit convention in Ljubljana/Slovenia. WAPA forecasts the 2011, EU-27 fresh apples crop at 10.2 million metric tons (MT). This is an increase of 3 percent compared to the smaller crop in 2010. Production of fresh pears is forecast at 2.5 million MT, versus 2.3 million MT in 2010. This is an increase of 12 percent. This forecast reflects the situation as of mid-July. Fruit development is further advanced compared to an average year and harvest is expected to start between 5 days and 3 weeks earlier than usual.

General Information:

Prognosfruit is the annual European crop forecast colloquium for apples and pears. It was first organized in 1975 with 33 experts from 6 countries. Starting in 2010, it also covers concentrated apple juice (CAJ). Prognosfruit 2011 was held August 5-6, 2011, in Ljubljana/Slovenia, with about 250 participants from 18 countries. Prognosfruit 2012 will take place in Toulouse/France August 9-11, 2012.

Abbreviations:

MS = EU member state(s)
 MT = metric ton(s)
 WAPA = World Apple and Pear Association

Production:**Forecast for Apples**

The EU-27 crop for apples in 2011 is forecast at 10.195 million MT. This is an increase of 5 percent compared to the small crop of 2010, which amounted to 9.697 million MT, but 5 percent below the 2008 through 2010 average. The forecast number includes 111,200 MT of organic apples, which thus for the first time exceed the 100,000 MT level. This forecast is based on information available in mid-July.

Table 1: EU-27 Apple Production by Country (1000 metric tons)

Country	2006	2007	2008	2009	2010	2011 f	% 2011 versus 2010	% 2011/ Average 08-10
Poland	2250	1100	3200	2600	1850	2300	24	-10
Italy	1991	2196	2164	2237	2179	2212	2	1
France	1585	1676	1528	1651	1579	1655	5	4
Germany	948	1070	1047	1071	835	896	7	-9
Spain	547	599	528	470	486	502	3	1
Netherlands	348	396	376	402	340	418	23	12
Romania	417	287	459	379	423	375	-11	-11
Hungary	480	203	583	514	488	300	-39	-43
Belgium	358	358	336	344	288	298	3	-8
Portugal	257	258	245	274	251	265	6	3
Greece	267	236	231	224	254	245	-4	4
UK	174	196	201	212	214	219	2	5
Austria	163	193	159	185	169	192	14	12
Slovenia	71	80	68	64	66	73	11	11
Czech Republic	160	113	157	145	103	66	-36	-51

Lithuania	100	40	74	74	46	60	30	-7
Bulgaria	26	26	24	35	40	40	0	21
Slovakia	31	10	42	48	32	33	3	-19
Denmark	27	32	26	24	21	20	-5	-15
Sweden	20	16	18	18	20	18	-10	-4
Latvia	32	31	34	13	12	8	-33	-59
Total:	10252	9117	11499	10984	9697	10195	5	-5

Source: WAPA

Table 2: EU-27 Apple Production by Variety (1000 metric tons)

Variety	2007	2008	2009	2010	2011 f	% 2011 versus 2010	% 2011/ Average 08-10
Golden Delicious	2450	2506	2630	2401	2533	5	1
Gala	1024	1045	1074	986	1059	7	2
Red Delicious	600	743	724	662	635	-4	-10
Jonagold	651	801	737	522	594	14	-13
Idared	292	804	795	569	575	1	-20
Elstar	487	468	487	361	429	19	-2
Granny Smith	305	311	341	339	338	0	2
Braeburn	318	295	338	289	311	8	1
Shampion	172	395	323	257	293	14	-10
Fuji	188	205	245	250	254	1	9
Jonathan	51	257	305	282	221	-21	-21
Jonagored	234	203	204	178	182	3	-6
Cripps Pink	73	70	162	159	170	7	30
Gloster	93	164	113	111	116	4	-11
Reinette Grise du Canada	103	86	99	101	104	3	9
Lobo	100	203	100	61	100	64	-18
Bramley	85	95	95	95	91	-4	-4
Cox Orange	108	103	65	89	89	0	4
Morgendurft/Imperatore	88	91	67	81	77	-5	-3
Cortland	75	136	80	50	70	40	-21
Boskoop	100	100	82	60	63	4	-22
Annurca	51	45	35	34	40	17	5
Red Jonaprince		21	29	28	31	11	20
Stayman	19	18	16	18	17	-8	-5
Pinova	30	35	27	30	13	-2	
Spartan	12	11	8	6	5	-16	-40
Other new varieties*	17	65	108	137	164	20	58

Other	1401	2226	1688	1546	1604	4	-12
Total:	9117	11499	10984	9697	10195	5	-5

f= forecast

Note: Category "Other" includes but is not limited to:

Annurca, Ariane, Belgica, Cameo, Diwa, Greenstar, Honey crunch, Jazz, Junami, Kanzi, Mariac, Rubens, Tentation, Wellant

Source: WAPA

Helwig Schwartau from AMI, Germany reported on the outlook for MY 2011/12. His major points were:

- The 2011 apple harvest is expected to start between 5 days (Czech Republic) and 3 weeks (Belgium, UK, and certain regions of France) earlier than normal. This is a consequence of early blossoming which resulted in further advanced fruit development compared to average years.
- The earlier start will allow for a longer marketing season and, hence, possibly more sales in the first half of the marketing year (MY).
- This expectation is also fostered by the fact that stocks are at a very low level at the beginning of the season. On June 1, 2011, one month before the end of MY 2010/11, stocks were already 28 percent below the previous year (see table below).
- In addition, stocks of concentrated apple juice, reportedly, are at an all time low, both in the EU and in China. This is expected to support high prices for processing apples, which could attract weaker quality table apples into the processing sector.
- Fruit quality is generally good, with the exception of some local hail damage and deformations resulting from frost.

Table 3: Commercial Apple Stocks in Select MS on June 1 (1000 metric tons)

STOCKS	2010	2011	2011:2010
Austria (Steiermark)	42	35	-17,4%
Belgium	66	35	-47,3%
Czech Republic	5	2	-67,2%
France	123	93	-24,5%
Germany	59	35	-41,5%
Italy	197	185	-5,9%
Poland	70	15	-78,6%
Spain (Catalonia)	26	24	-7,2%
Switzerland	16	16	-2,9%
The Netherlands	58	36	-37,9%
United Kingdom	12	9	-0.25%
Total	673	483	-28,2%

Source: WAPA

Forecast for Pears

Production of fresh pears is forecast at 2.5 million MT, versus 2.3 million MT in 2010. This is an increase of 12 percent compared to 2010 and 8 percent compared to the three year average of 2008-2010.

Major points presented on pears included:

- The harvests will start 2-3 weeks earlier than usual
- Fruit quality is good.
- Germany is the biggest and most important market for pears in the EU.
- Italy, the largest producer of pears in the EU, sees a reduction in domestic pear consumption resulting in larger exports to Germany. This trend is expected to continue as the share of consumers who consume little or no pears is growing especially in the younger population.
- The Benelux countries report an increase in pear area, which are gradually coming into production and will reach its full potential in 2015.
- Imports from South Africa are expected to decrease as this country is increasingly shipping to Asia and the Middle East.
- EU pear exports to Russia are trending upwards but Russia is viewed as a difficult market.

Table 4: EU-27 pear production by country (1,000 metric tons)

Country	2006	2007	2008	2009	2010	2011 f	% 2011 versus 2010	% 2011/ Average 08-10
Italy	966	922	759	858	680	886	30	16
Spain	536	495	476	429	457	427	-6	-6
Belgium	268	287	170	307	285	308	8	21
Netherlands	234	255	172	301	267	300	12	22
Portugal	173	136	168	198	172	210	22	17
France	246	221	157	202	164	176	7	1
Poland	55	31	40	90	40	55	38	-3
Greece	45	51	51	43	54	47	-14	-5
Germany	57	56	38	52	39	40	3	-7
UK	27	29	23	31	33	26	-21	-10
Romania	24	21	53	24	20	23	17	-28
Hungary	39	12	40	40	36	21	-41	-45
Bulgaria	2	4	4	6	6	6	0	13
Denmark	6	6	5	7	6	5	-25	-25
Czech Rep	2	3	3	6	3	2	-37	-45
Slovakia	1	1	1	1	1	1	26	7
Latvia	2	1	1	0	0	0	-25	-73

Sweden	2	2	1	2	1	0	-60	-68
Total:	2684	2533	2161	2599	2264	2533	12	8

F = forecast

Source: WAPA

Table 5: EU-27 Pear Production by Variety (1000 metric tons)

Variety	2006	2007	2008	2009	2010	2011 f	% 2011 versus 2010	% 2011/ Average 08- 10
Conference	819	816	632	897	820	889	8	14
Abate Fetel	328	324	248	305	223	370	66	43
William	350	320	307	309	284	307	8	2
BC/Bartlett								
Rocha	172	136	168	197	171	209	22	17
Doyenne du Comice	135	126	82	116	94	103	10	6
Guyot	109	105	98	102	92	92	-1	-6
Coscia-Ercollini	104	110	107	106	98	89	-9	-14
Blanquilla	147	139	89	92	89	82	-8	-9
Kaiser	60	59	39	65	42	61	45	27
Passacrassana	29	25	21	19	15	18	15	-5
Durondeau	9	7	6	8	6	7	8	-1
Other	423	366	365	382	329	306	-7	-15
Total:	2684	2533	2161	2599	2264	2533	12	8

f= forecast

Source: WAPA

Concentrated Apple Juice (CAJ)

In 2010, the scope of Prognosfruit was broadened to cover CAJ because of its significant impact on table apple prices in the fall. This year Franz Ennsner from the Austrian company Agrana Juice Holding GmbH gave his view on the outlook for CAJ.

His major points included:

- MY2011/12 beginning stocks are extremely low at just 5,000 MT compared to 66,000 MT in MY2010/11 and 99,000 MT in MY2009/10.
- China will export more of its CAJ to the United States following the revocation of U.S. anti-dumping duties in November 2010. As a result less Chinese CAJ is coming to the EU.
- More of the EU CAJ imports will originate from Turkey, Serbia, and Moldova.
- MY 2010/11 has witnessed a sharp increase in CAJ prices following low world market supplies. For MY 2011/12 prices are expected to remain stable on a high level.
- Expected high prices for processing apples will support higher prices on the table apple market.

