

Voluntary Report – Voluntary - Public Distribution

Date: September 01, 2022

Report Number: E42022-0055

Report Name: Prognosfruit 2022

Country: European Union

Post: Berlin

Report Category: Fresh Deciduous Fruit

Prepared By: Sabine Lieberz

Approved By: Kimberly Sawatzki

Report Highlights:

On August 3-5, 2022, the World Apple and Pear Association (WAPA) presented the 2022 EU apple and pear crop forecast at the 47th edition of the Prognosfruit convention. WAPA forecasts the 2022 EU fresh apples crop at 12.2 million metric tons (MT), 1.3 percent above the 2021 harvest and nine percent higher than the average of the preceding three years. Production of fresh pears is forecast at 2.1 million MT. This is an increase of 20 percent compared to 2021, and five percent higher than the preceding three years' average. This forecast reflects the situation as of mid-July. The heatwave and drought in July/August in large parts of Europe may result in a substantially lower production than forecast.

General Information:

Prognosfruit is the annual European crop forecast colloquium for apples and pears. Since 2010, it also covers concentrated apple juice (CAJ). Prognosfruit 2022 attracted more than 200 participants from 23 countries. This was the first in-person event after two years of virtual editions due to the COVID-19 pandemic. It was held in Belgrade/Serbia on August 3-5, 2022.

Philippe Binard from WAPA presented the apple and pear forecast and Helwig Schwartau from *Agrarmarkt Informations-Gesellschaft mbH* (AMI), Germany, reported on the market outlook for MY 2022/23. Fritz Prem, president of the *European Biofruit Forum* (EBF) reported on the situation for organic fruits, and Franz Ennser with *Austria Juice* covered the CAJ market. Their presentations were followed by a roundtable discussion with representatives from Poland, Italy, France, Spain, and Belgium.

Additional presentations not covered in this report focused on the market situation for apples and pears in neighboring European markets (Serbia, Moldova, Ukraine, Turkey) as well as in markets further afield (United States, China, India, Central Asia and Caucasus), and on the cider market.

All forecasts are based on information available in mid-July.

Prognosfruit 2023 is planned for August 2-4, 2023, in Trento, Italy.

Abbreviations:

CAJ	= Concentrated Apple Juice
EU	= European Union
MS	= EU member state(s)
MT	= metric ton(s)
WAPA	= World Apple and Pear Association

Forecast for Apples

WAPA forecasts the apple crop of 20 EU member states plus the UK in 2022 at 12.17 million MT¹. This is an increase of 1.3 percent compared to the 2021 harvest and 7 percent higher than the average of the preceding ten years. If materialized, it would be the third largest crop of the last ten years. The forecast number includes 658,000 MT of organic apples.

Without the UK, production is expected at 11.9 MMT, 0.8 percent above 2021 and 6.8 percent above the average of the preceding ten years, respectively.

Major Points on EU production:

- Over the years, EU apple acreage is declining but yields per hectare are trending upwards.
- Poland has the largest share of apple production area in the EU with 32 percent of EU commercial apple acreage, followed by France, Italy, and Romania, with 11 percent each.
- Spring frosts negatively impacted production only in Spain (Catalunya).
- In July, a heatwave in July affected South and Western Europe and a drought affected almost the entire EU. This could reduce the presented production forecast, as the effects will only show closer to the actual harvest.
- Organic production is forecast to increase to 658,000 MT compared to 626,000 MT in 2021. While this is an increase of 5.1 percent year on year, organic production contributes only 5.4 percent of total apple production.
- It is expected that 65 percent of production will be consumed fresh, while 35 percent will be processed (2021/22: 64 percent fresh/36 percent processing.)
- Harvest is expected to start two to three weeks earlier than average in Austria, Belgium, Southern Germany, and Italy; one week later in Poland; and at normal times elsewhere.
- Fruit size is expected to be large in Italy, the Czech Republic, and Belgium and average elsewhere. However, sizes could turn out smaller than expected due to the heat wave and drought. Post comment: Should this be the case it would reduce the production volume as smaller apples weigh less.
- Farmers and processors are concerned about a potential shortage of seasonal workers for harvesting and processing due to the war in Ukraine. This is particularly true for Poland. Prior to the Russian invasion in Ukraine, a substantial number of seasonal workers came from Ukraine.
- Production costs have increased because of higher costs for inputs such as energy, fertilizers, and plant protection products. In Poland, some producers have responded by focusing on their most productive fields and reducing fertilizer and plant protection application in less productive orchards.

¹ This forecast only pertains to the 21 countries that participate in WAPA. Apple production also exists in Bulgaria, Cyprus, Estonia, Finland, Ireland, and Luxemburg. According to Eurostat their combined production amounted to roughly 80,000 MT in recent years. Malta does not have commercial apple production.

Major Points on market conditions:

- There is a large variation of market conditions throughout the EU, depending on the apple variety and country.
- Positive factors:
 - Stocks of concentrated apple juice (CAJ) are below average. As a result, the processing sector will likely absorb higher quantities of apples.
 - Additionally, China expects a 20-percent lower apple crop due to weather issues. As a result, Chinese CAJ production should be significantly lower, which in turn would lead to less competition on the world market.
 - Non-commercial backyard production in Germany is expected at an average level (500,000 MT) and thus should not put additional pressure on the market.
- Negative factors:
 - End of marketing year apple stocks are higher than in the previous season.
 - Higher production, especially in Poland, needs to find additional markets.
 - Consumers spend less money on food as higher energy costs reduce their budgets.
 - Exports could suffer from lower demand as countries with food security issues (e.g., Egypt) will likely prioritize importing wheat over importing apples.
 - Steep increase in costs for logistics
 - Shortage of truck and container availability
 - Ukraine, Moldova, and Serbia are emerging as new competitors on the EU market as they try to get less dependent on exports to Russia.
 - High energy costs are problematic for CAJ production. Energy costs have superseded raw material costs as most important input factor cost for CAJ production.

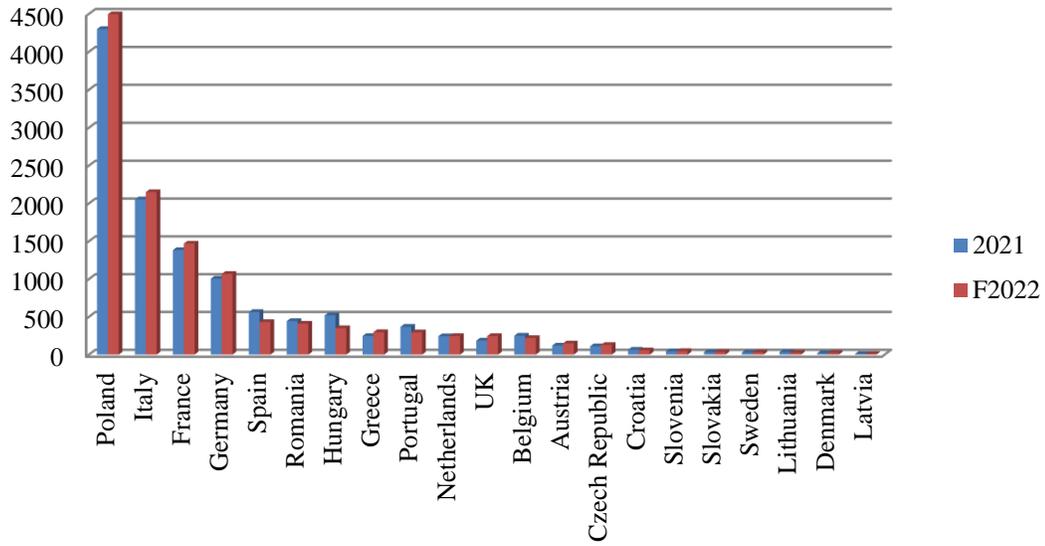
FAS/Berlin analysis: U.S. apple exporters could see higher competition from the EU on the world market, as production is forecast at the third-highest level of the past ten years.

Table 1: EU+UK Apple Production by Country (1000 MT)

Country	2017	2018	2019	2020	2021	2022 f	% 2022 versus 2021	% 2022/ Average 19-21
Poland	2870	4810	2910	3410	4300	4495	5%	27%
Italy	1704	2264	2096	2124	2053	2150	5%	3%
France	1424	1477	1651	1337	1383	1468	6%	1%
Germany	597	1093	991	1023	1005	1067	6%	6%
Spain	480	476	555	425	563	431	-23%	-16%
Romania	230	425	327	384	444	410	-8%	6%
Hungary	530	782	452	350	520	350	-33%	-21%
Greece	231	301	276	208	246	297	21%	22%
Portugal	314	267	354	278	368	294	-20%	-12%
Netherlands	228	267	272	220	243	245	1%	0%
UK	207	219	205	196	186	245	32%	25%
Belgium	88	231	242	168	250	219	-12%	0%
Austria	67	184	146	126	120	148	23%	13%
Czech Republic	102	145	103	118	110	128	16%	16%
Croatia	66	86	60	55	65	57	-12%	-5%
Slovenia	6	72	36	46	44	47	7%	12%
Slovakia	15	44	35	30	31	34	10%	6%
Sweden	18	32	20	32	27	30	11%	14%
Lithuania	48	62	26	60	32	25	-22%	-36%
Denmark	19	24	15	24	18	24	33%	26%
Latvia	8	14	10	14	8	8	0%	-25%
Total	9251	13275	10783	10700	12016	12168	1%	9%

Source: WAPA, f = Forecast

EU+UK Apple Production by Member State in 1000 MT



Source: FAS/Berlin based on WAPA data

F= Forecast

Table 2: EU+UK Apple Production by Variety (1000 MT)

Variety	2017	2018	2019	2020	2021	2022 f	% 2022 versus 2021	% 2022/ Average 19-21
Golden Delicious	1911	2403	2261	1967	2168	2064	-5%	-3%
Gala	1271	1467	1439	1443	1585	1614	2%	8%
Red Delicious	558	737	678	660	677	697	3%	4%
Idared	629	1177	592	626	729	659	-10%	2%
Red Jonaprince	114	371	407	441	470	581	24%	32%
Shampion	416	569	413	423	465	456	-2%	5%
Jonagold	298	577	391	312	466	426	-9%	9%
Granny Smith	363	393	372	365	347	373	7%	3%
Elstar	265	357	363	312	333	364	9%	8%
Cripps Pink/Pink Lady®	260	275	289	273	256	311	21%	14%
Fuji/Kiku®	290	332	316	313	306	309	1%	-1%
Ligol	250	350	150	210	280	260	-7%	22%
Braeburn	220	312	286	251	237	250	5%	-3%
Jonagored	335	563	246	250	250	230	-8%	-8%
Pinova	85	155	140	161	194	205	6%	24%
Gloster	166	190	145	154	201	141	-30%	-15%
Reinette Grise du	83	142	129	131	136	140	3%	6%
Boskoop	34	66	55	46	61	87	43%	61%
Jonathan	108	150	164	96	84	75	-11%	-35%
Bramley	75	72	54	50	43	64	49%	31%
Morgenduft/Imperatore	54	58	48	54	32	46	44%	3%
Annurca	35	40	45	45	45	45	0%	0%
Cox Orange	20	23	17	29	25	29	16%	23%
Other new varieties	208	356	319	334	366	436	19%	28%
Other	1203	2140	1464	1754	2260	2306	2%	26%
Total:	9251	13275	10783	10700	12016	12168	1%	9%

f= forecast

Note: Category “Other new varieties” includes but is not limited to: Ariane, Belgica, Cameo, Diwa, Greenstar, Honey Crunch, Jazz, Junami, Kanzi, Mariac, Rubens, Tentation, Wellant

Source: WAPA

Table 3: Commercial Apple Stocks in Select MS, UK, and Switzerland on July 1 (1000 MT)

Country	2021	2022	2022:2021
Italy	143,461	150,134	5%
Poland	133,000	94,000	-29%
France	54,730	82,467	51%
Spain (Catalonia)	27,662	56,851	106%
Germany	33,212	48,829	47%
Belgium	16,318	39,815	144%
The Netherlands	13,881	24,940	80%
Austria (Steiermark)	22,879	18,634	-19%
Switzerland	9,655	12,352	28%
United Kingdom	4,833	4,239	-12%
Czech Republic	0	2,800	∞
Denmark	0	460	∞
TOTAL	459,631	535,521	17%

Source: WAPA

Forecast for Pears

Production of fresh pears is forecast at 2.08 million MT², versus 1.73 million MT in 2021. This is an increase of 20 percent compared to 2021 and five percent below the average of the preceding ten years.

Major Points on EU Production:

- EU pear area is declining in the EU. However, the Netherlands and Belgium have expanded their pear area in recent years (mainly of the *Conference* variety.)
- In 2022, production is declining in Spain and Portugal and rebounding from the frost stricken previous year everywhere else.
- In the variety mix, *Conference* defended its position as the primary variety with 45 percent of total pear production. *Williams Christ/Bartlett* is number two and *Abate Fetel* regained the number three position from *Rocha* at number four. New varieties (e.g., *Xenia*, *Qtee*, *Migo*, *Sweet Sensation*) are gaining market share and are expected to double their production volume by 2025 compared to 2021.
- Harvest is expected to begin one to two weeks early compared to the average picking time in most countries; while Italy and Greece are expected to start at normal times.

² This forecast only pertains to the 19 countries that participate in WAPA for pears. Pear production also exists in Austria, Bulgaria, Cyprus, Finland, and Luxemburg. According to Eurostat their combined production amounted to roughly 40,000 MT in recent years. Estonia, Ireland, Lithuania, and Malta do not have commercial pear production.

Major Points on Market Conditions:

- Overall, production and demand should be well balanced, but situation differs by country.
- Current price level matches previous year's level as EU pear stocks are depleted.
- The majority of pear trade occurs within the EU internal market. For exports outside the EU, Spain and Portugal are the largest actors. From August 2021 to April 2022, Spain was able to increase its exports to Northern Africa; while Portugal's extra-EU pear exports to Latin America (Brazil) remained flat.
- Italy, the Netherlands, and Belgium export mostly to other EU member states.
- Traditionally, Eastern Europe is an important market for Dutch and Belgian pears. Exports to this region have suffered since the Russian invasion in Ukraine.
- Germany is the largest market for pears in the EU. Consumption is stable but unlikely to grow.

Table 4: EU pear production by country (1,000 MT)

Country	2017	2018	2019	2020	2021	2022 f	% 2022 versus 2021	% 2022/ Average 19-21
Italy	738	730	363	611	202	474	135%	21%
Netherlands	330	402	373	400	340	368	8%	-1%
Belgium	310	369	332	393	356	366	3%	2%
Spain	331	298	313	307	309	256	-17%	-17%
Portugal	186	142	202	139	225	167	-26%	-11%
France	133	134	121	133	58	137	136%	32%
Greece	59	60	58	80	67	101	51%	48%
Poland	40	70	70	65	70	95	36%	39%
Germany	23	45	42	39	37	37	0%	-6%
Romania	12	21	16	19	21	21	0%	13%
Hungary	35	38	32	16	16	17	6%	-20%
UK	25	23	20	17	15	16	7%	-8%
Czech Rep	4	7	6	6	7	8	14%	26%
Denmark	5	6	4	6	6	7	17%	31%
Croatia	6	4	3	2	2	2	0%	-14%
Sweden	1	2	1	2	2	2	0%	20%
Slovenia	0	5	1	1	1	2	100%	100%
Slovakia	1	1	1	1	1	1	0%	0%
Latvia	0	0	1	1	1	1	0%	0%
Total:	2239	2358	1959	2236	1736	2077	20%	5%

f = forecast, Source: WAPA

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

Variety	2017	2018	2019	2020	2021	2022 f	% 2022 versus 2021	% 2022/ Average 19-21
Conference	873	988	892	984	877	935	7%	2%
William BC /Bartlett	263	272	200	257	140	237	69%	19%
Abate Fetel	328	318	140	247	53	194	266%	32%
Rocha	186	142	202	139	226	168	-26%	-11%
Comice	59	82	62	72	46	58	26%	-3%
Coscia-Ercollini	79	70	63	73	55	51	-7%	-20%
Guyot	65	58	58	55	35	43	23%	-13%
Blanquilla	43	40	37	38	33	29	-12%	-19%
Kaiser	43	45	17	41	12	28	133%	20%
Passacrassana	9	10	7	8	4	6	50%	-5%
Durondeau	2	4	3	3	2	2	0%	-25%
Other	287	329	278	319	252	325	29%	15%
Total:	2237	2358	1959	2236	1736	2077	20%	5%

f= forecast, Source: WAPA

Related reports:**Fresh Deciduous Fruit Annual | E42021-0079Berlin | European Union****Published On: November 09, 2021**

EU commercial apple production in Marketing Year (MY) 2021/22 is forecast at 11 MMT, an increase of 4.5% compared to the previous year. EU commercial pear production is expected to amount to 1.6 MMT; 28% lower than in the previous year, due to unfavorable growing conditions early in the season, while EU commercial table grape production is forecast up 1% from the previous season at 1.38 MMT. COVID-19 did not impact production volumes but did increase production costs due to the imposition of COVID-19-related sanitary standards in the harvesting and distribution process.

[Fresh Deciduous Fruit Annual_Berlin_European Union_11-01-2021](#)

Attachments:

No Attachments.