

Voluntary Report – Voluntary - Public Distribution

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Report Name: Prognosfruit 2023 - EU Apple and Pear Production is Forecast to Decline

Country: European Union

Post: Berlin

Report Category: Fresh Deciduous Fruit

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Report Highlights:

On August 2-4, 2023, the World Apple and Pear Association (WAPA) presented the 2023 EU apple and pear crop forecast at the 48th edition of the Prognosfruit convention. WAPA forecasts the 2023 EU fresh apples crop at 11.4 million metric tons (MT), 3.3 percent below the 2022 harvest. The reduction is a result of poor pollination and droughts. Production of fresh pears is forecast at 1.7 million MT. This is a decrease of 12.8 percent compared to 2022, and largely a result of weather-related reductions in Italy, France, and Greece. This forecast reflects the situation as of mid-July.

General Information:

Prognosfruit is the annual European crop forecast colloquium for apples and pears. Since 2010, it also covers concentrated apple juice (CAJ). Prognosfruit 2023 attracted 350 participants from 26 countries. It was held in Trento/Italy from August 2-4, 2023.



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 2023/24. Gerhard Eberhoefer board member of the *European Biofruit Forum* (EBF) reported on the situation for organic fruits, and Klaus Heitlinger with the German Fruit Juice Industry Association (VdF) covered the CAJ market.



Their presentations were followed by a roundtable discussion with representatives from Poland, Italy, France, Germany, and Hungary.

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

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

Prognosfruit 2024 is planned for August 7-9, 2024, in Budapest, Hungary.

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 in 2023 at 11.4 million MT¹. This is a decrease of 3.3 percent compared to the 2022 harvest, yet 0.3 percent higher than the average of the preceding ten years. Nonetheless, it would be the fourth smallest crop of the last ten years. The forecast number includes 683,000 MT of organic apples.

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 31 percent of EU commercial apple acreage, followed by France, Italy, and Romania, with 11 percent each.
- With the exception of Emilia Romagna in Italy there were fewer spring frosts than usual.
- The mild winter led to poor pollination.
- Drought and /or high temperatures affected large parts of the EU at different times of the year. Portugal and Spain experienced a severe drought in spring, while the northern and north-eastern EU suffered from lack of rain in June/July.
- Organic production is forecast to decrease to 683,000 MT compared to 722,000 MT in 2022, taking the share of organic at total EU apple production to six percent (2022: 6.14 percent). This is well below the 25 percent goal that the EU has set itself for 2030, making it highly unlikely that this goal will be achieved.
- It is expected that 60 percent of production will be consumed fresh, while 40 percent will be processed (2022/23: 59 percent fresh/41 percent processing).
- Harvest is expected to start one week earlier than average in Portugal; one week later in Greece; and at normal times (albeit one week earlier than last year) elsewhere.
- Fruit size is expected to be slightly larger than normal in France, Hungary, Portugal, and Romania; slightly smaller in Austria and Slovenia; and average elsewhere.
- Production costs have increased because of higher costs for inputs such as energy, fertilizers, plant protection products, labor, and logistics.
- The EU sustainable use of pesticide regulation will impact farmers ability to protect their orchards against pests and diseases.

¹ This forecast only pertains to the 20 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:

- End of marketing year apple stocks are lower than in the previous season.
- Import from overseas from January through July 2023 were 30 percent lower than in 2022.
- Stocks of concentrated apple juice (CAJ) are below average. As a result, the processing sector will likely absorb higher quantities of apples.
- Non-commercial backyard production in Germany is expected to be at a low level (300,000 MT), and thus should not put pressure on the market.
- India will potentially increase its imports as its own apple production is forecast 30 percent lower than in 2022.

Negative factors:

- Consumer spending on food is still a constraint as higher energy costs and inflation reduces their budgets.
- High competition from other fruits, e.g., berries.
- EU apple exports will face strong competition from Türkiye in India as high inflation enables Türkiye to offer their apples cheaper.
- High production costs
- High costs for energy and logistics

FAS/Berlin analysis: U.S. apple exporters could potentially benefit from reduced competition from the EU on the world market, as production is forecast at the fourth-lowest level of the past ten years.

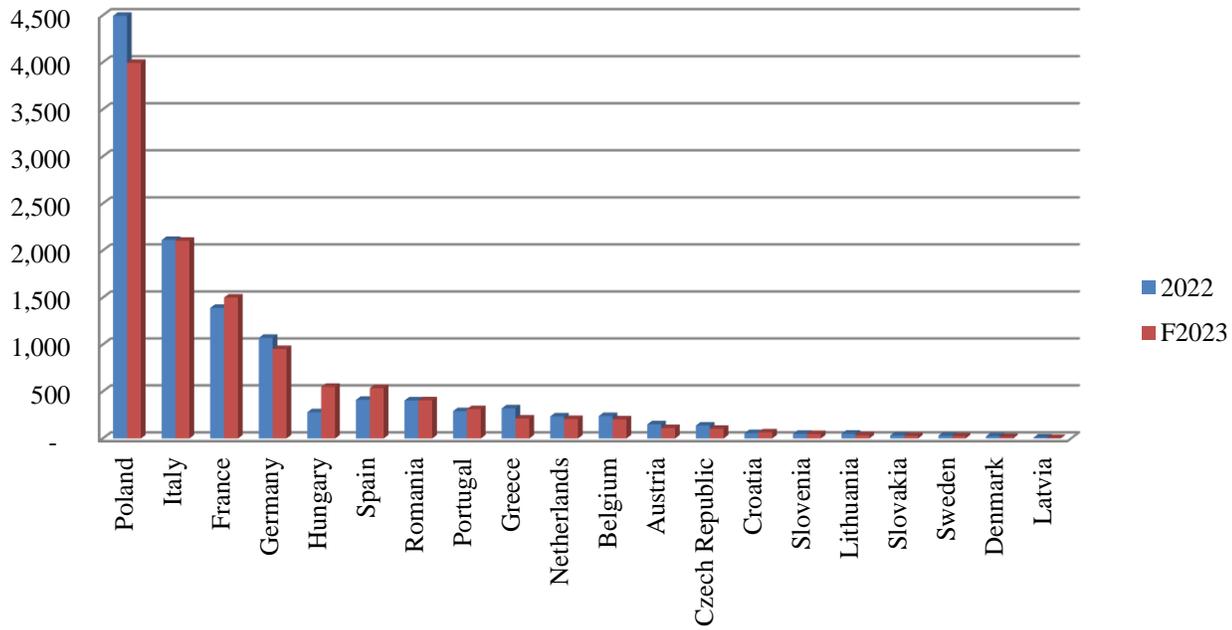
Table 1: EU Apple Production by Country (1000 MT)

Country	2018	2019	2020	2021	2022	2023 f	% 2023 versus 2022	% 2023 versus Average 20-22
Poland	4,810	2,910	3,410	4,300	4,495	3,995	-11%	-2%
Italy	2,264	2,096	2,124	2,053	2,113	2,104	0%	0%
France	1,477	1,651	1,337	1,383	1,391	1,501	8%	10%
Germany	1,093	991	1,023	1,005	1,072	952	-11%	-8%
Hungary	782	452	350	520	280	550	96%	43%
Spain	476	555	425	563	412	536	30%	15%
Romania	425	327	384	444	405	406	0%	-1%
Portugal	267	354	278	368	291	313	8%	0%
Greece	301	276	208	246	321	212	-34%	-18%
Netherlands	267	272	220	243	235	207	-12%	-11%
Belgium	231	242	168	250	239	203	-15%	-7%
Austria	184	146	126	120	151	111	-26%	-16%
Czech Republic	145	103	118	110	138	103	-25%	-16%
Croatia	86	60	55	65	57	65	14%	10%
Slovenia	72	36	46	44	50	47	-6%	1%
Lithuania	62	26	60	36	51	35	-31%	-29%
Slovakia	44	35	30	31	32	27	-16%	-13%
Sweden	32	20	32	27	30	24	-20%	-19%
Denmark	24	15	24	18	24	15	-38%	-32%
Latvia	14	10	14	8	10	5	-50%	-53%
Poland	4,810	2,910	3,410	4,300	4,495	3,995	-11%	-2%
Total	13,056	10,578	10,496	11,834	11,796	11,411	-3.3%	0.3%

Source: WAPA

f = Forecast

EU Apple Production by Member State in 1000 MT



Source: FAS/Berlin based on WAPA data

F= Forecast

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

Variety	2018	2019	2020	2021	2022	2023 f	% 2023 versus 2022	% 2023/ Average 20-22
Golden Delicious	2,403	2,261	1,967	2,168	1,941	2,168	12%	7%
Gala	1,400	1,364	1,372	1,517	1,457	1,527	5%	5%
Red Delicious	737	678	660	677	685	617	-10%	-8%
Idared	1,177	592	626	729	640	601	-6%	-10%
Red Jonaprince	371	407	441	470	579	493	-15%	-1%
Shampion	569	413	423	465	465	422	-9%	-6%
Jonagold	577	391	312	466	402	371	-8%	-6%
Granny Smith	393	372	365	347	410	318	-22%	-15%
Fuji/Kiku®	332	316	313	306	334	307	-8%	-3%
Elstar	357	363	312	333	376	296	-21%	-13%
Cripps Pink	275	289	273	256	319	292	-8%	3%
Ligol	350	150	210	280	260	220	-15%	-12%
Pinova	155	140	161	194	205	198	-3%	6%
Braeburn	281	254	221	205	202	196	-3%	-6%
Jonagored	563	246	250	250	206	168	-18%	-29%
Reinette Grise du Canada	142	129	131	136	146	150	3%	9%
Gloster	190	145	154	201	141	121	-14%	-27%
Jonathan	150	164	96	84	93	106	14%	16%
Boskoop	66	55	46	61	84	74	-12%	16%
Morgenduft/ Imperatore	58	48	54	32	32	51	59%	30%
Annurca	40	45	45	45	45	38	-16%	-16%
Cox Orange	4	3	17	16	14	10	-29%	-36%
Other new varieties	336	297	309	340	497	588	18%	54%
Other	2,130	1,456	1,738	2,256	2,263	2,079	-8%	0%
Total:	13,056	10,578	10,496	11,834	11,796	11,411	-3%	0%

f= forecast

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

Source: WAPA

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

Country	2022	2023	2023:2022
Italy	150,134	97,499	-35%
Poland	94,000	70,000	-26%
France	82,467	40,653	-51%
Germany	48,829	26,597	-46%
Spain (Catalonia)	56,851	26,036	-54%
Austria (Steiermark)	18,634	22,702	22%
The Netherlands	24,940	20,622	-17%
United Kingdom	2,721	20,226	643%
Belgium	39,815	9,353	-77%
Switzerland	12,352	4,734	-62%
Czech Republic	2,800	0	-100%
Denmark	460	0	-100%
TOTAL	534,003	338,421	-37%

Source: WAPA

Forecast for Pears

Production of fresh pears is forecast at 1.7 million MT², versus 2 million MT in 2022. This is a decrease of 12.9 percent compared to 2022 and 19 percent below the average of the preceding ten years. If materialized, it would be the second smallest crop of the last ten years. The forecast number includes 58,000 MT of organic pears.

Major Points on EU Production:

- 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 2023, production is significantly declining in Italy (down 63 percent due to frosts, floods, and hail damage) and France (down 29 percent) compared to the 2022 harvest. The final production number for Italy will likely be even lower, as the forecast was done in mid-July and does not yet include the damage resulting from a late July storm. In contrast, Belgium, the Netherlands, Spain, and Portugal are expecting a normal to above average production.
- In the variety mix, Conference defended its position as the primary variety with 53 percent of total pear production. Williams Christ/Bartlett is number two and while Abate Fetel lost the number three position to Rocha and is now at number five behind Coscia-Ercollini. New varieties (e.g., Xenia, Qtee, Migo, Sweet Sensation) are gaining market share.
- Due to climate change, pear production will move north.

Major Points on Market Conditions:

- Small EU harvest and depleted pear stocks should bode well for higher prices.
- The majority of pear trade occurs within the EU internal market. Belgium and the Netherlands will benefit from the crop failure in Italy.
- For exports outside the EU, the United Kingdom is the most important destination, especially for Belgium and the Netherlands.
- Spain and Portugal are the largest actors for exports to Northern Africa and South America.
- Traditionally, Eastern Europe was an important market for Dutch and Belgian pears. This may change with growing pear production in Poland.
- Germany is the largest market for pears in the EU.
- Pear consumption in the EU is declining, especially in Spain and Italy.

² This forecast only pertains to the 18 counties that participate in WAPA for pears. Pear production also exists in Austria, Bulgaria, Cyprus, Finland, and Luxembourg. 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.

Table 4: EU Pear Production by Country (1,000 MT)

Country	2018	2019	2020	2021	2022	2023 f	% 2023 versus 2022	% 2023/ Average 20-22
Belgium	369	332	393	356	346	412	19%	13%
Netherlands	402	373	400	340	352	341	-3%	-6%
Spain	298	313	307	309	236	296	25%	4%
Italy	730	363	611	202	505	187	-63%	-57%
Portugal	142	202	139	225	132	138	5%	-17%
France	134	121	133	58	147	105	-29%	-7%
Poland	70	70	65	70	95	100	5%	30%
Greece	60	58	80	67	99	71	-28%	-13%
Germany	45	42	39	37	36	37	3%	-1%
Hungary	38	32	16	16	15	20	33%	28%
Romania	21	16	19	21	18	18	0%	-7%
Czech Rep	7	6	6	7	7	9	29%	35%
Denmark	6	4	6	6	7	7	0%	11%
Croatia	4	3	2	2	2	2	0%	0%
Sweden	2	1	2	2	2	2	0%	0%
Slovakia	1	1	1	1	1	1	0%	0%
Slovenia	5	1	1	1	3	1	-67%	-40%
Latvia	0	1	1	1	1	0	-100%	-100%
Total:	2,334	1,939	2,219	1,721	2,003	1,746	-12.8%	-11.9%

f = forecast,

Source: WAPA

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

Variety	2018	2019	2020	2021	2022	2023 f	% 2023 versus 2022	% 2023/ Average 20-22
Conference	967	875	968	864	860	928	8%	3%
William BC /Bartlett	272	200	257	140	243	154	-37%	-28%
Rocha	142	202	139	226	132	138	5%	-17%
Coscia-Ercollini	70	63	73	55	78	55	-29%	-20%
Abate Fetel	318	140	247	53	172	53	-69%	-66%
Comice	82	62	72	46	60	50	-17%	-16%
Guyot	58	58	55	35	53	42	-21%	-12%
Blanquilla	40	37	38	33	26	31	19%	-4%
Kaiser	45	17	41	12	29	14	-52%	-49%
Passacrassana	10	7	8	4	4	2	-50%	-63%
Durondeau	4	3	3	2	2	2	0%	-14%
Other new varieties					60	67	12%	
Other	327	275	318	251	284	210	-26%	-26%
Total:	2,335	1,939	2,219	1,721	2,003	1,746	-12.8%	-11.9%

f= forecast

Note: Category “Other new varieties” includes but is not limited to: Early Desire®, Migo, QTee®/Celina. Red Conference, Sweet Sensation®, Xenia®

Source: WAPA

Attachments:

No Attachments.