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Fresh Deciduous Fruit
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Report Highlights:
On August 8 - 10, 2018, the World Apple and Pear Association (WAPA) presented the 2018 EU apple and pear crop forecast at the 42th Prognosfruit convention in Warsaw/Poland. WAPA forecasts the 2018 EU fresh apples crop at 12.6 million metric tons (MT). This is not only a 36 percent increase compared to the record low crop in 2017 but also the largest apple production in the EU ever. Production of fresh pears is forecast at 2.3 million MT, versus 2.2 million MT in 2017. This is an increase of 4 percent. This forecast reflects the situation as of mid-July. Actual production may well be lower than forecast due to the drought in Northern Europe. U.S. apple exporters might face increasing competition from the EU on the world market but could benefit from opportunities in India.

General Information:

Prognosfruit is the annual European crop forecast colloquium for apples and pears. Since 2010, it also covers concentrated apple juice (CAJ). Prognosfruit 2018 was held August 8-10, 2018, in Warsaw/Poland, with about 300 participants from 21 countries. Prognosfruit 2019 will be held in Bilzen/Belgium on August 7-9, 2019.

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

Abbreviations:

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

Forecast for Apples

The EU crop for apples in 2018 is forecast at 12.6 million MT. If materialized this would be an increase of 36 percent compared to the record low crop of 2017, which amounted to 9.25 million MT. The forecast is 14 percent higher than the 10-year average. The forecast number includes 151,000 MT of organic apples.

Philipe Binard from WAPA presented the apple forecast and Helwig Schwartau from AMI, Germany reported on the outlook for MY 2018/19. Their major points were:

On EU production:

- If the forecast production materializes, it would be the largest crop ever recorded in the EU.
- However, the drought in North-West Europe may have a negative impact of fruit size, thus reducing actual production. Germany, for example, already anticipates a reduction of the forecast by about 50,000 MT (about 5 percent of the original German forecast and 0.5 of the EU forecast).
- Harvest is expected to start two weeks earlier than average.
- Fruit quality is generally good with the exception of potential problems with sunburn and fruit coloring. The latter is a result of insufficient differences between daytime and nighttime temperatures.
- Organic production contributes 3.5 percent of total apple production.
- Polish production outpaces consumption as new orchards come into production. This could pose a problem in the coming years if Poland does not find new markets.

On market conditions:

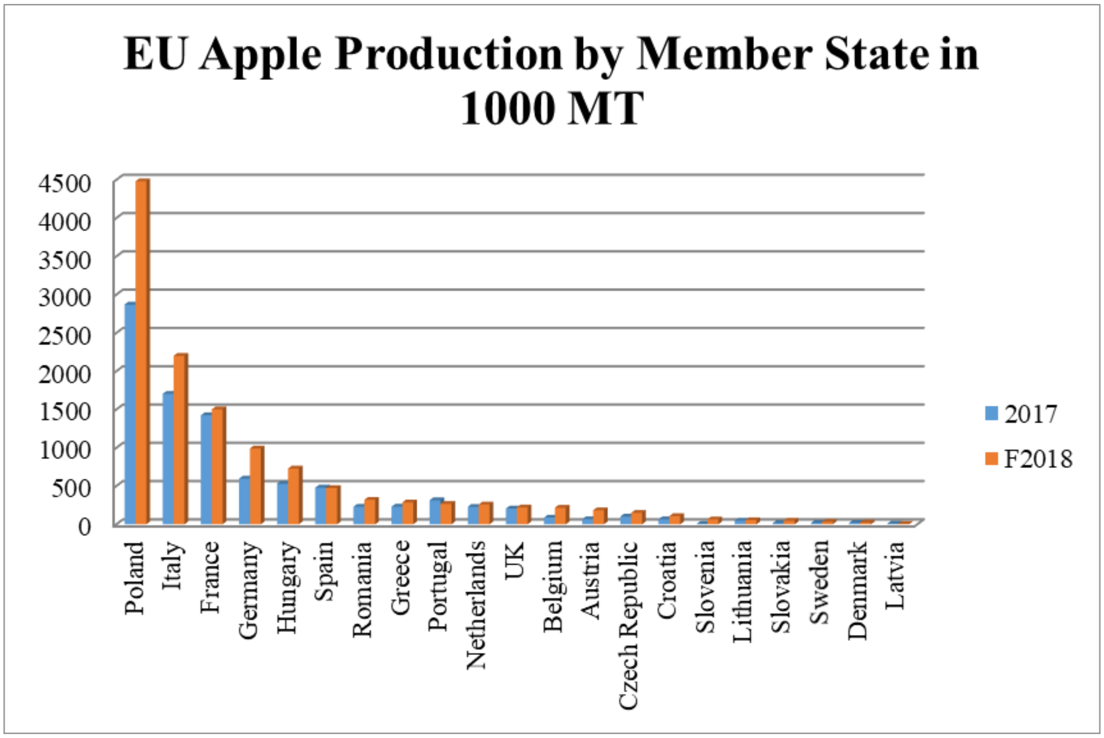
- Low stocks should ensure good marketing opportunities at the beginning of the season.
- Opportunities for apple exports to India should increase for the EU and the US as India has banned apple imports from China for phyto-sanitary reasons.
- The larger availability of processing apples should not have a negative effect on prices this year as stock of concentrated apple juice (CAJ) and “not from concentrate” (NFC) juice are depleted.
- In addition, China expects a very low apple crop due to frost damage in its Eastern provinces. As a result, Chinese CAJ production should be significantly lower, which in turn would lead to less competition on the world market.
- In most countries fruit consumption increases; however, apple consumption decreases to the benefit of exotic fruits and berries.

FAS/Berlin analysis: U.S. apple exporters might face increasing competition from the EU on the world market, as stagnant or even decreasing domestic consumption forces EU producers to find additional markets outside the EU.

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

Country	2013	2014	2015	2016	2017	2018 f	% 2018 versus 2017	% 2018/ Average 15-17
Poland	3170	3750	3979	4035	2870	4480	56%	23%
Italy	2122	2456	2280	2272	1704	2200	29%	5%
France	1576	1444	1674	1515	1424	1502	5%	-2%
Germany	804	1116	973	1033	597	990	66%	14%
Hungary	585	920	522	498	530	728	37%	41%
Spain	464	505	482	495	480	473	-1%	-3%
Romania	387	382	336	327	230	320	39%	8%
Greece	236	245	242	259	231	286	24%	17%
Portugal	284	272	329	263	314	267	-15%	-12%
Netherlands	314	353	336	317	228	259	14%	-12%
UK	204	225	243	244	206	220	7%	-5%
Belgium	220	318	285	234	88	217	147%	7%
Austria	155	188	177	40	67	184	175%	94%
Czech Republic	121	131	156	139	102	150	47%	13%
Croatia	96	62	101	35	66	108	64%	60%
Slovenia	56	68	71	12	6	65	983%	119%
Lithuania	40	27	46	50	48	54	13%	13%
Slovakia	42	46	40	17	15	47	213%	96%
Sweden	17	16	21	20	18	32	78%	63%
Denmark	23	26	24	24	19	24	26%	7%
Latvia	15	10	8	10	8	6	-25%	-31%
Total	**10929**	**12558**	**12326**	**11840**	**9251**	**12611**	**36%**	**13%**

Source: WAPA; f = Forecast



Source: FAS/Berlin based on WAPA data; F= Forecast

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

Variety	2013	2014	2015	2016	2017	2018 f	% 2018 versus 2017	% 2018/ Average 15-17
Golden Delicious	2535	2677	2534	2406	1911	2347	23%	3%
Gala	1204	1328	1382	1314	1271	1457	15%	10%
Idared	1069	1192	1129	965	629	1148	83%	26%
Red Delicious	597	675	643	632	558	692	24%	13%
Shampion	457	494	513	522	416	571	37%	18%
Jonagored	341	491	519	539	335	545	63%	17%
Jonagold	500	644	633	567	298	539	81%	8%
Granny Smith	361	383	405	384	363	381	5%	-1%
Red Jonaprince	53	98	104	156	114	353	210%	183%
Ligol	260	290	303	330	250	350	40%	19%
Elstar	346	431	399	387	265	335	26%	-4%
Fuji/Kiku	311	321	338	288	290	327	13%	7%
Braeburn	302	322	327	320	220	305	39%	6%
Cripps Pink	187	249	244	261	260	277	7%	9%
Gloster	196	201	183	197	166	187	13%	3%
Jonathan	178	193	143	123	108	150	39%	20%
Pinova	62	79	119	104	85	138	62%	34%
Reinette Grise du	121	126	134	108	83	130	57%	20%
Bramley	70	83	84	85	75	77	3%	-5%
Boskoop	58	85	92	71	34	63	85%	-4%
Morgenduft/Imperatore	57	74	46	49	54	59	9%	19%
Annurca	35	40	35	35	35	40	14%	14%
Cox Orange	42	32	34	29	20	20	0%	-28%
Stayman	18	14	14	14	8	7	-13%	-42%
Other new varieties	152	168	207	211	208	307	48%	47%
Other	1417	1868	1762	1743	1195	1806	51%	15%
Total:	**10929**	**12558**	**12326**	**11840**	**9251**	**12611**	**36%**	**13%**

f= forecast; Source: WAPA

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

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

Country	2017	2018	2018:2017
Italy	112	66	-41%
Germany	21	25	19%
Austria (Steiermark)	24	16	-33%
The Netherlands	26	15	-42%
Poland	11	14	27%
France	50	12	-76%
Switzerland	9	6	-34%
Spain (Catalonia)	22	5	-78%
Belgium	8	4	-47%
United Kingdom	2	2	0%
Total	**286**	**166**	**-42%**

Source: WAPA

Forecast for Pears

Production of fresh pears is forecast at 2.3 million MT, versus 2.2 million MT in 2017. This is an increase of 4 percent compared to 2017 and 3 percent higher than the average of the three preceding years 2015-2017.

Helene Deruwe from WAPA presented the pear forecast and Helwig Schwartau from AMI, Germany reported on the outlook for MY 2018/19. Their major points were:

On EU production:

- Drought impact is stronger than in apples.
- After a strong decrease from 2009 to 2013, EU pear acreage has stabilized since 2014 at around 117,000 ha.
- In the variety mix Conference and Comice continue to increase at the expense of Rocha, while Bartlett and Abate Fetel stagnate.

On market conditions:

- Fewer imports from overseas as more and more retailer prefer EU pears and do not switch to overseas anymore.
- Pear consumption is stable to slightly increasing.
- The UK imports around 135,000 MT of pears from other EU member states annually. Brexit could have a significant impact on the EU pear market depending on the outcome of the exit negotiations and/or the development of the Pound/Euro exchange rate.
- The majority of pear trade occurs within the EU internal market. For exports outside the EU Spain and Portugal are the largest actors. About half of Spain’s extra-EU pear exports are destined to Northern Africa; the other half goes to South America and the Middle East. Portugal’s major extra-EU export destination is Brazil.

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

Country	2013	2014	2015	2016	2017	2018 f	% 2018 versus 2017	% 2018/ Average 15-17
Italy	726	736	764	681	738	741	0%	2%
Netherlands	327	349	349	374	330	398	21%	13%
Belgium	315	374	369	322	310	318	3%	-5%
Spain	403	400	344	311	331	311	-6%	-5%
Portugal	162	203	134	113	186	158	-15%	9%
France	154	131	155	138	133	135	2%	-5%
Poland	65	50	80	55	40	70	75%	20%
Greece	32	37	60	47	59	57	-3%	3%
Hungary	36	40	33	38	35	38	9%	8%
Germany	34	45	43	35	23	31	35%	-8%
UK	26	24	25	27	25	21	-16%	-18%
Romania	24	17	13	16	12	17	42%	24%
Czech Rep.	7	4	10	7	4	11	175%	57%
Croatia	3	2	2	1	6	7	17%	133%
Denmark	6	6	6	6	5	6	20%	6%
Slovenia	3	4	4	1	0	4		140%
Sweden	1	1	1	1	1	2	100%	100%
Slovakia	1	0	1	0	1	1	0%	50%
Total:	**2327**	**2426**	**2394**	**2173**	**2239**	**2327**	**4%**	**3%**

f = forecast; Source: WAPA

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

Variety	2013	2014	2015	2016	2017	2018 f	% 2018 versus 2017	% 2018/ Average 15-17
Conference	894	951	967	910	873	953	9%	4%
Abate Fetel	304	358	333	296	328	333	2%	4%
Williams BC /Bartlett	283	278	283	261	263	267	2%	-1%
Rocha	162	203	134	113	186	158	-15%	9%
Comice	83	94	87	81	59	74	25%	-2%
Coscia-Ercollini	80	66	79	67	79	70	-11%	-7%
Guyot	80	67	74	59	65	58	-11%	-12%
Kaiser	54	33	45	38	43	45	5%	7%
Blanquilla	54	49	44	40	43	41	-5%	-3%
Passacrassana	14	11	12	11	9	9	0%	-16%
Durondeau	6	6	5	3	2	3	50%	-10%
Other	313	310	331	294	289	316	9%	4%
Total:	**2327**	**2426**	**2394**	**2173**	**2239**	**2327**	**4%**	**3%**

f= forecast; Source: WAPA