

# European apple crop outlook 2016

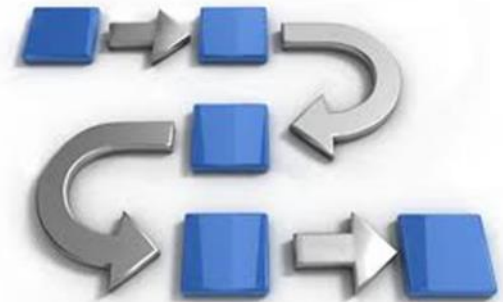
*“a quantitative and qualitative review”*



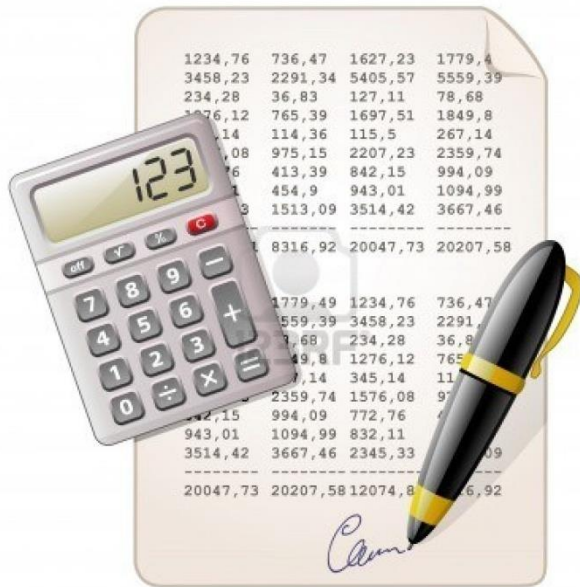
Philippe Binard  
World Apple and Pear Association (WAPA)

# Opening remarks

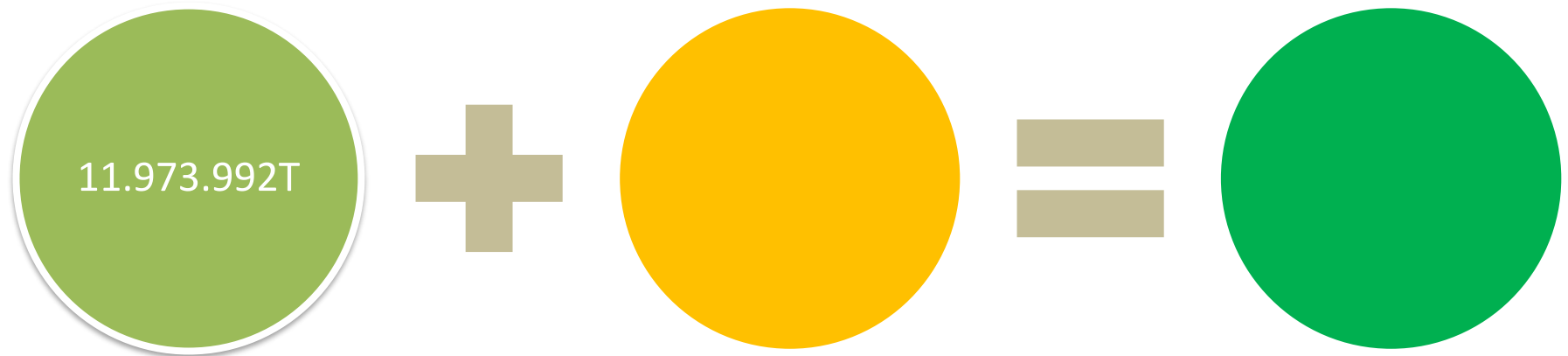
- ✓ Cooperation
- ✓ Reliability
- ✓ Methodology
- ✓ Validation 2015 data and 2016 forecast
- ✓ Global outreach
- ✓ Calendar



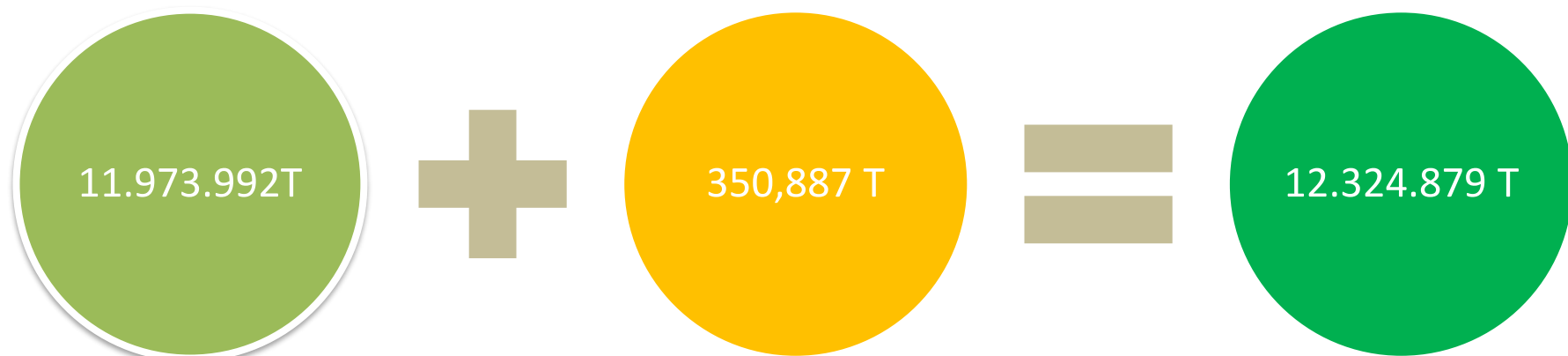
# LOOKING BACKWARDS VALIDATION 2015 DATA AND OTHER 2015 DEVELOPMENTS



# Variation 1st estimate



# Variation 1st estimate v. final



**30%**

# Forecast and actual results up to 2015

Year	var%	var in 000 T
2007	3%	266
2008	10%	1048
2009	2%	216
2010	-1%	-95
2011	5%	512
2012	3%	295
2013	1%	112
2014	6%	675
2015	3%	351



+ 352.000 T

## Forecast v. Final crop

14.000

12.000

10.000

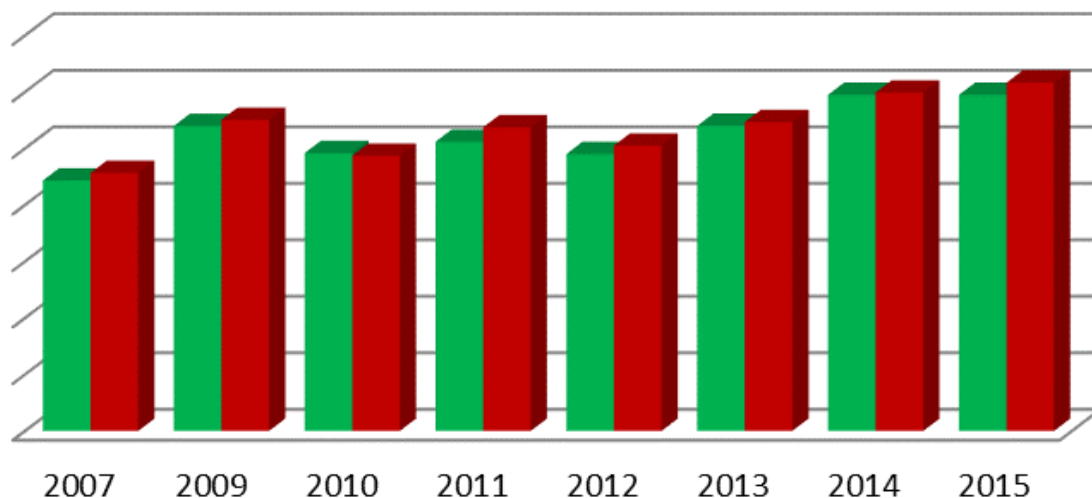
8.000

6.000

4.000

2.000

-

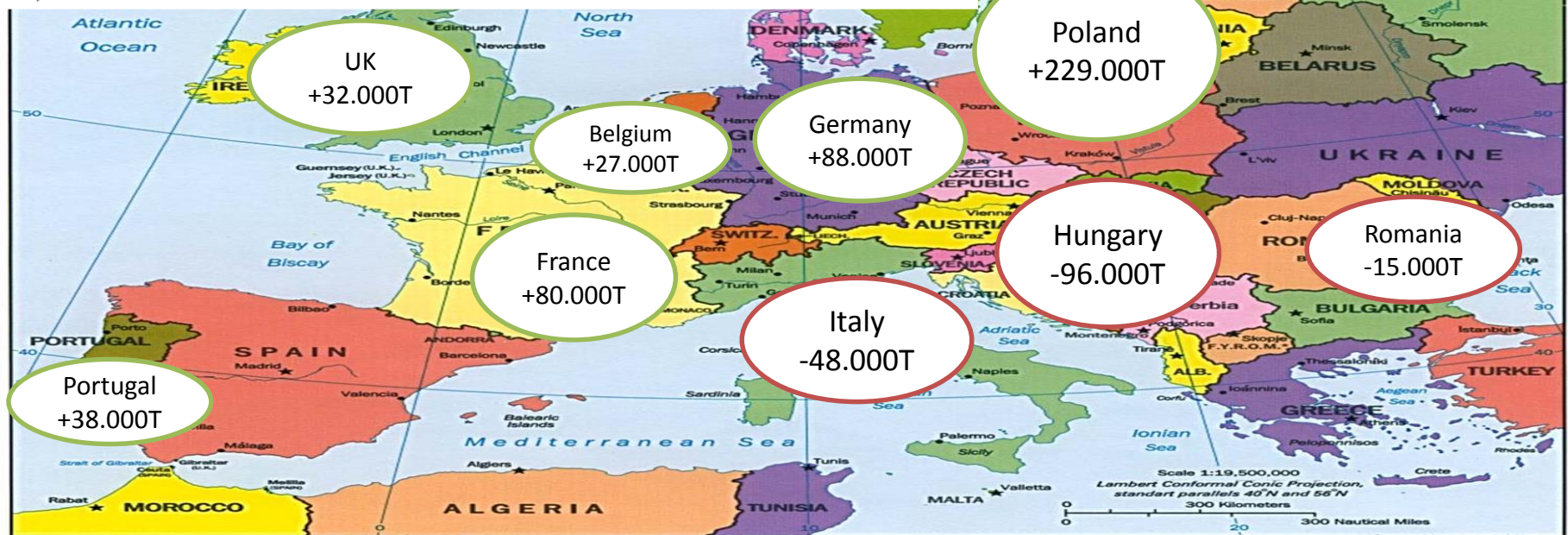
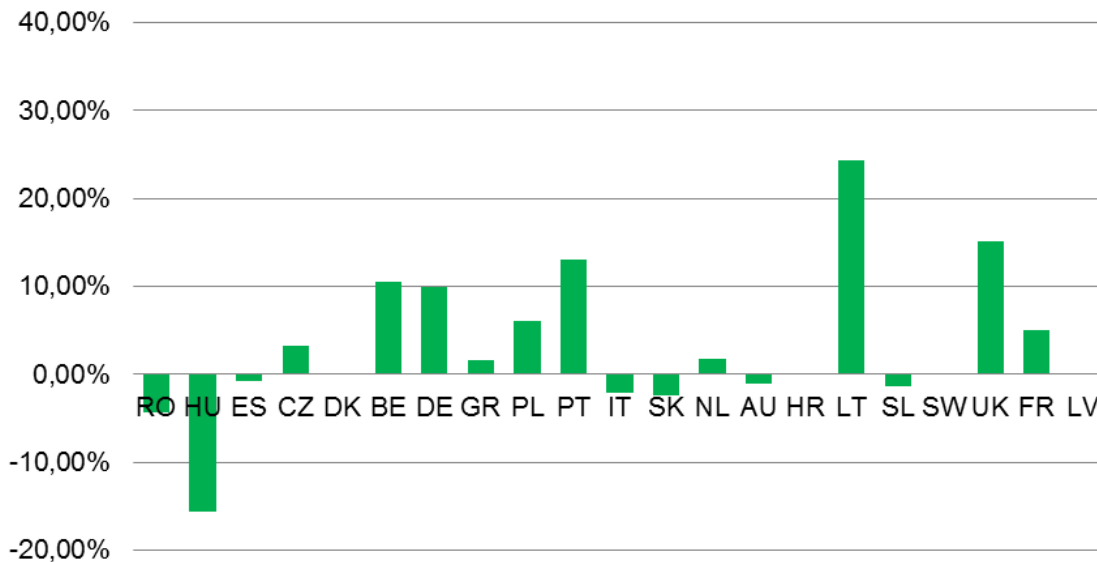


■ Forecast ■ Final

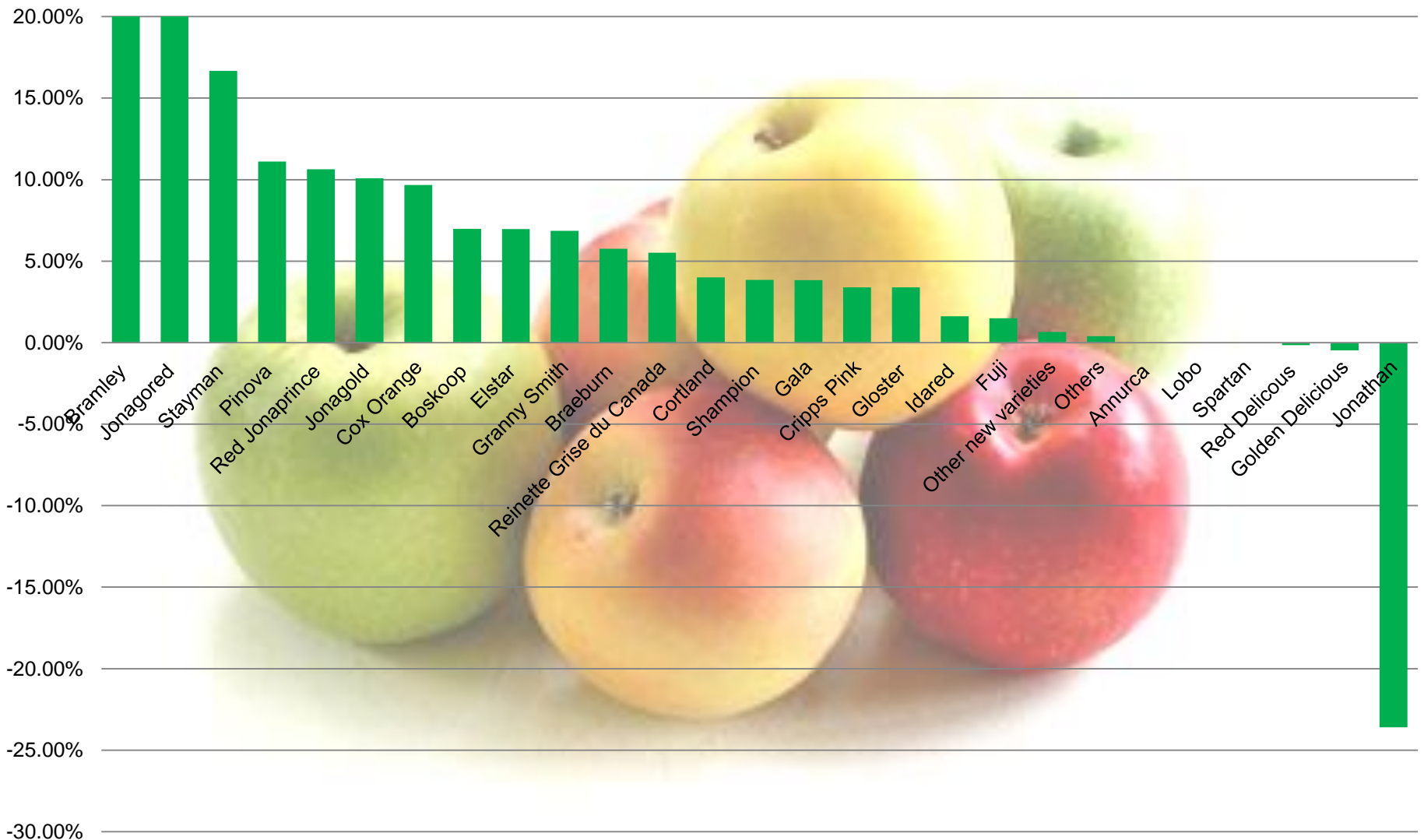




# 2015 forecast and actual MS results (in T & % )



# Comparison apple forecast 2015 and actual results 2015 (per variety in %)



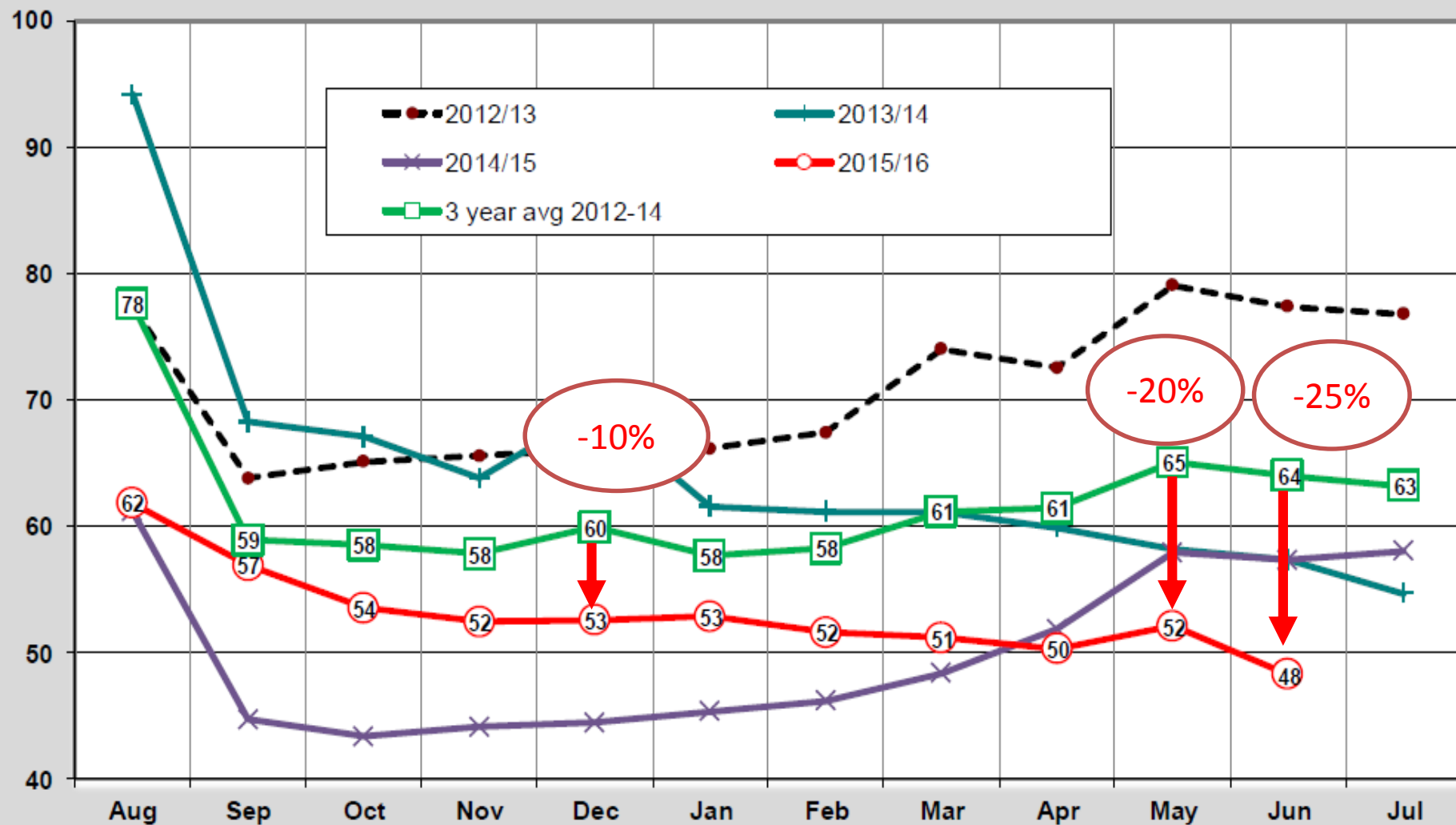


# Forecast and actual results 2015 (per varieties in %)



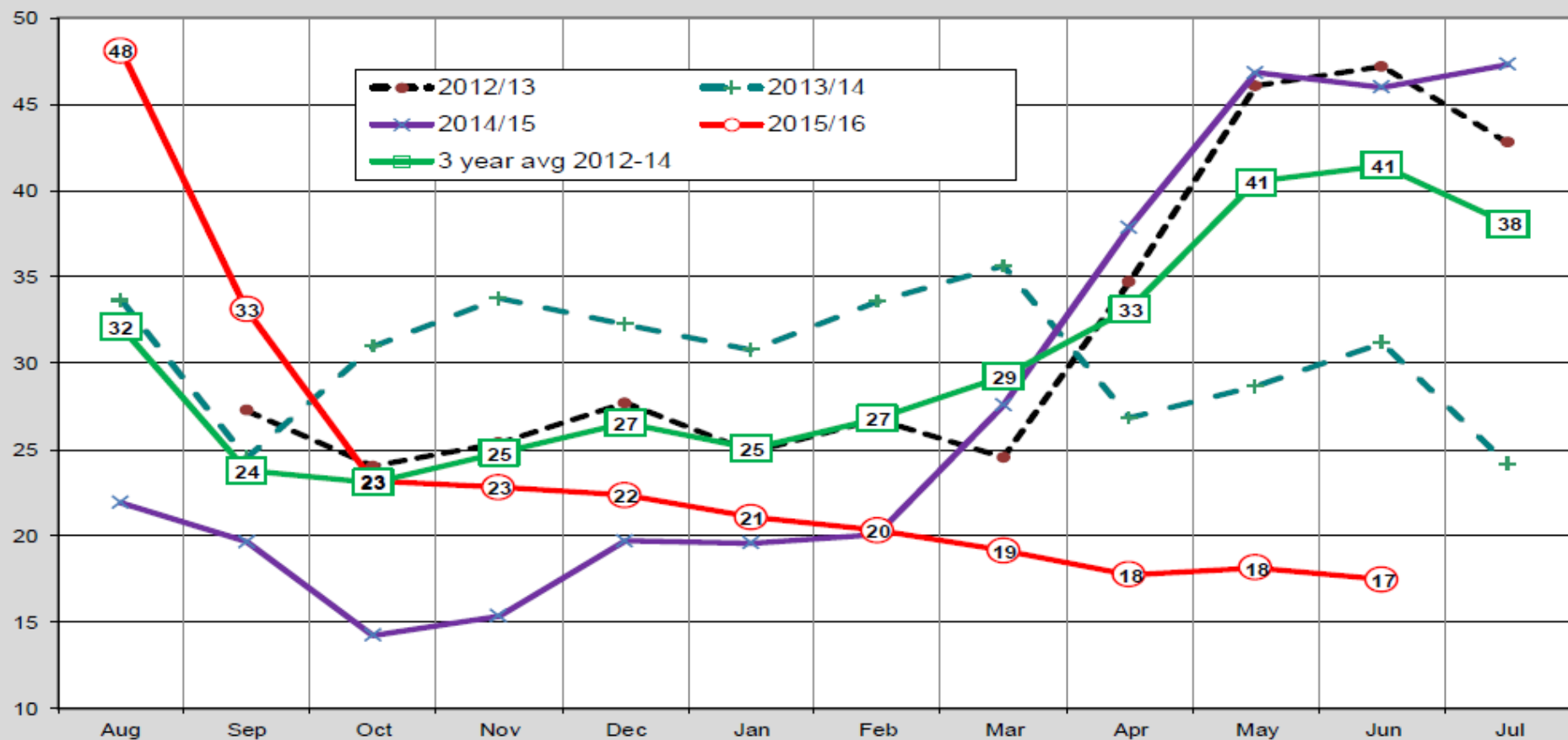
# Prices trends

Producer prices (weighted avg) - European Union (€/100 kg)



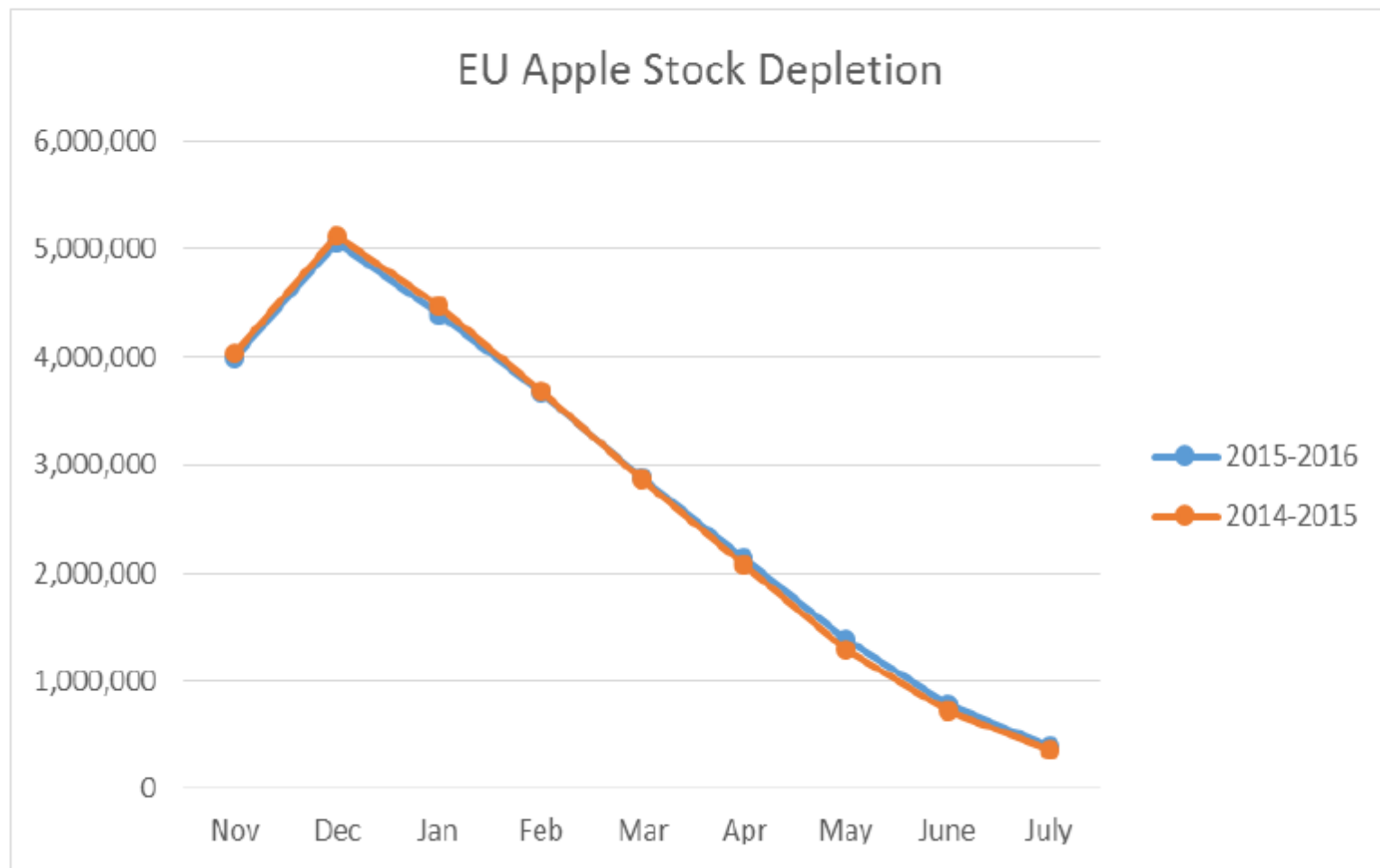
# Prices in Poland

Producer prices - Poland (€/100 kg)



# Stocks trends

## Development apple stocks in EU countries (tonnes)

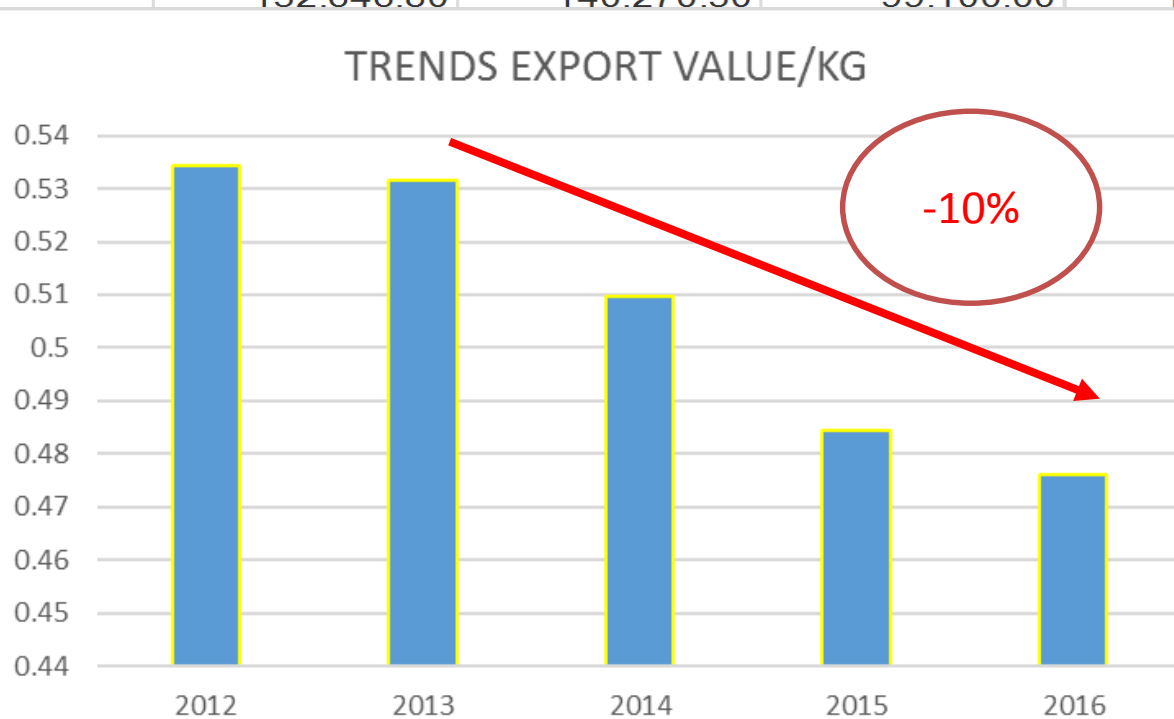


# Apples destinations: trends ( in T)

Partner	2015	2014	2013	2012
<b>Total</b>	<b>1.733.820,00</b>	<b>1.728.254,60</b>	<b>1.507.287,40</b>	<b>1.549.789,80</b>
Belarus	645.932,80	337.599,30	157.873,50	126.608,80
Egypt	227.090,40	155.866,30	48.780,80	68.624,70
Algeria	132.646,80	140.270,30	99.100,00	111.794,40
Kazakhstan	79.976,60	68.561,20	50.503,40	42.903,00
Saudi Arabia	72.229,30	59.260,90	35.639,20	48.365,00
UAE	64.877,10	61.922,10	30.151,00	33.745,70
Ukraine	56.029,40	41.123,00	54.743,20	92.808,10
Russia	51.495,90	508.085,70	789.630,10	761.784,20
Norway	40.936,70	35.499,00	35.922,20	37.895,00
Libya	40.802,20	56.340,50	59.288,50	56.176,50
Serbia	33.492,60	12.978,60	5.902,70	5.921,30
Jordan	31.074,40	22.319,70	5.473,50	8.245,40
Bosnia Herz	28.832,50	23.877,80	12.171,60	18.650,80
India	18.554,90	7.033,10	671,60	1.628,30
Brazil	16.233,40	25.502,40	8.992,80	8.294,20
Turkey	14.340,90	13.770,50	4.653,20	6.528,10
Israel	11.995,80	16.704,50	9.052,10	7.064,70
Albania	11.300,30	8.699,20	8.658,80	11.347,40
Switzerland	10.304,40	11.951,60	13.819,70	8.229,50
Colombia	9.755,30	7.008,30	1.912,90	4.002,00
Morocco	8.804,90	6.686,70	6.888,80	7.538,50
Iraq	8.656,30	1.039,10	411,80	829,80
Malaysia	7.645,70	8.874,40	5.190,50	5.070,20
Qatar	7.064,90	5.688,70	2.922,50	3.493,30
Singapore	7.060,60	7.513,80	4.576,10	5.423,20

# Apples destinations: trends ( in T)

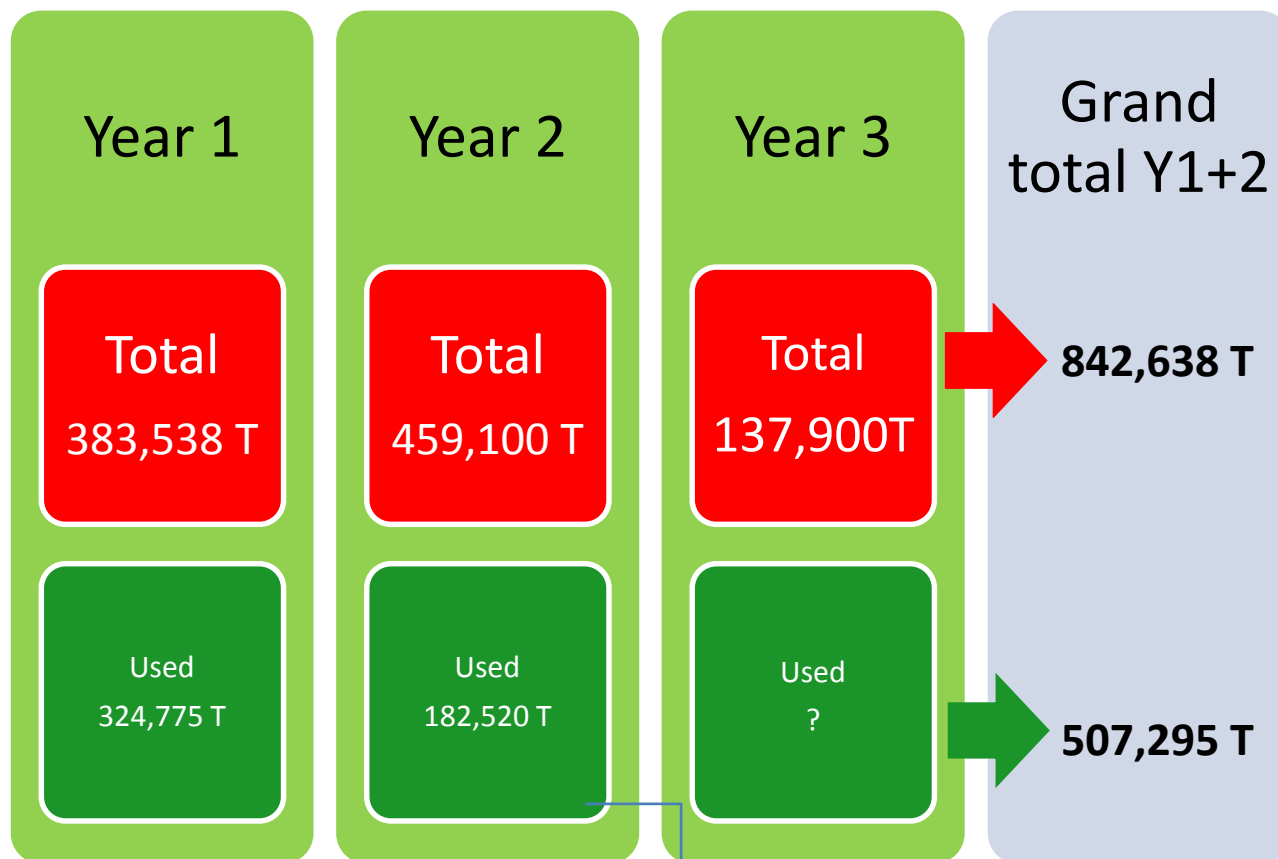
Partner	2015	2014	2013	2012
<b>Total</b>	<b>1.733.820,00</b>	<b>1.728.254,60</b>	<b>1.507.287,40</b>	<b>1.549.789,80</b>
Belarus	645.932,80	337.599,30	157.873,50	126.608,80
Egypt	227.090,40	155.866,30	48.780,80	68.624,70
Algeria	132.646,80	140.270,30	99.100,00	111.794,40
Kazakhstan				2.903,00
Saudi Arabia				3.365,00
UAE				3.745,70
Ukraine				2.808,10
Russia				1.784,20
Norway				7.895,00
Libya				3.176,50
Serbia				5.921,30
Jordan				3.245,40
Bosnia and Herzegovina				3.650,80
India				1.628,30
Brazil				3.294,20
Turkey				3.528,10
Israel				7.064,70
Albania				1.347,40
Switzerland				3.229,50
Colombia				1.002,00
Morocco	8.884,30	8.888,70	8.888,80	7.538,50
Iraq	8.656,30	1.039,10	411,80	829,80
Malaysia	7.645,70	8.874,40	5.190,50	5.070,20
Qatar	7.064,90	5.688,70	2.922,50	3.493,30
Singapore	7.060,60	7.513,80	4.576,10	5.423,20





EU exports to RU  
pre-embargo:  
Apples: 800.000 T  
Pears: 200.000 T

# Russian embargo



Apples	
Withdrawal	Eur/100kg
Free distribution old	16,98
Free distribution new	24,16
Other destination old	13,22
Other destination new	18,11
Exceptional measures	Eur/100kg
Free distribution	16,98
Other destination	13,22

PL : 134.000 T; IT: 12.400 T; BE: 7.700 T;  
Hu: 5.150; FR: 5.000T; ES: 3.500 T

# Brexit or not?



Total EU & third  
countries import  
of apples 425.000  
T => over 60%  
from the EU

Reporter EU	2015	2014	2013	2012
<b>Total in T</b>	<b>207,209.30</b>	<b>214,680.10</b>	<b>200,025.40</b>	<b>234,214.00</b>
France	117,766.20	123,177.00	107,099.60	121,057.20
Italy	33,190.40	28,827.00	26,876.10	35,472.90
Spain	14,969.80	18,679.80	11,383.20	15,918.60
Netherlands	10,571.30	10,327.90	16,336.70	21,968.80
Belgium	8,097.90	6,506.90	7,359.90	7,758.70
Austria	4,761.80	3,161.40	3,710.30	5,375.90
Poland	4,674.20	10,657.60	8,125.30	6,746.90
Portugal	4,218.30	4,961.20	5,860.20	6,735.90
Ireland	4,198.00	3,410.40	4,608.80	5,520.50
Germany	2,934.60	2,600.80	5,208.80	4,497.30
Slovenia	1,705.60	2,084.00	2,698.70	1,725.20

GBP/EUR 90 Day History





# The Bitter Taste of Europe's Apple Production

## and how Ecological Solutions can Bloom



June 2015

GREENPEACE

 **Prognosfruit**  
3 - 5 August 2016, Hamburg

**eurocoop**  
European Community of Consumer Co-operatives

**GREENPEACE**

**IBMA**  
INTERNATIONAL BIOCONTROL  
MANUFACTURERS ASSOCIATION

 **IOBC  
OILB**

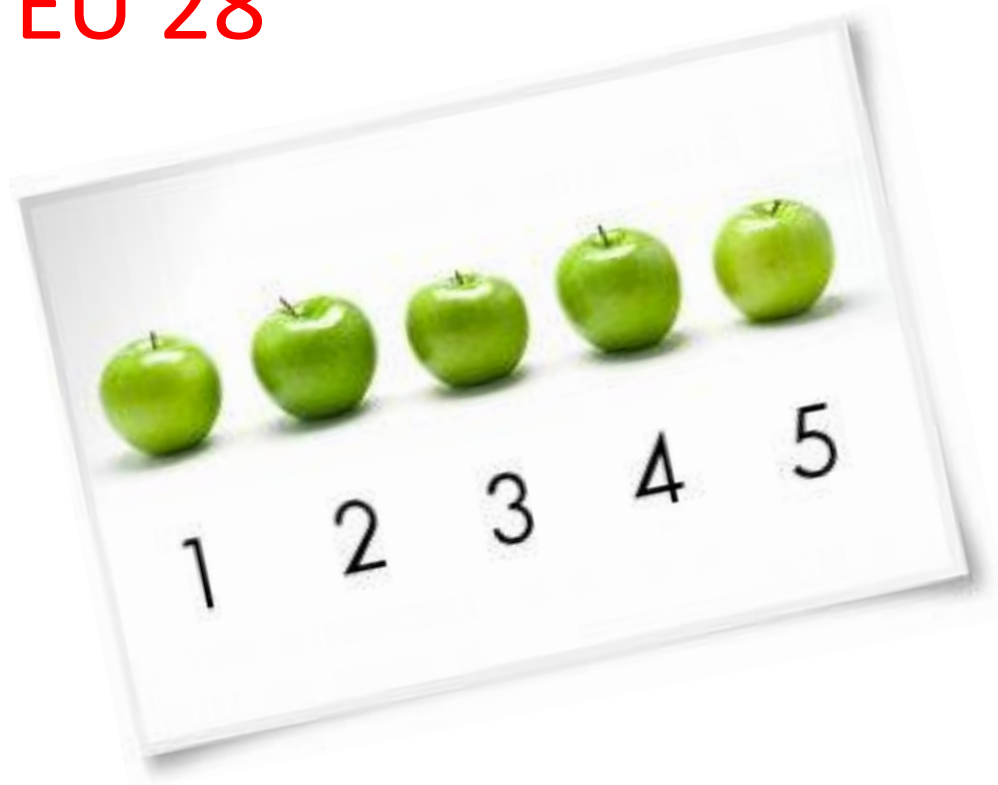
 **Pesticide  
Action  
Network  
Europe**

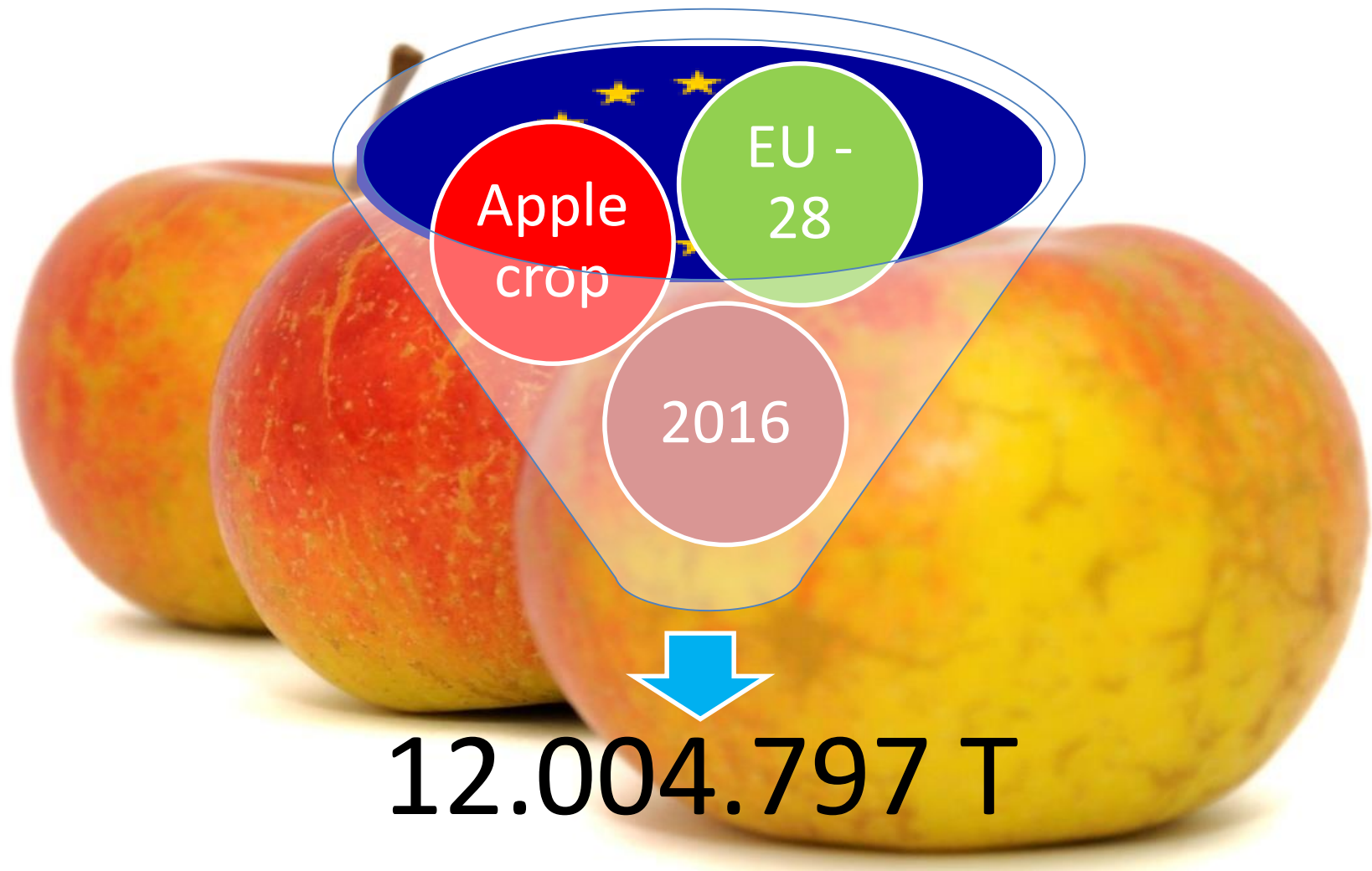






# APPLES forecast 2016: quantitative approach EU 28





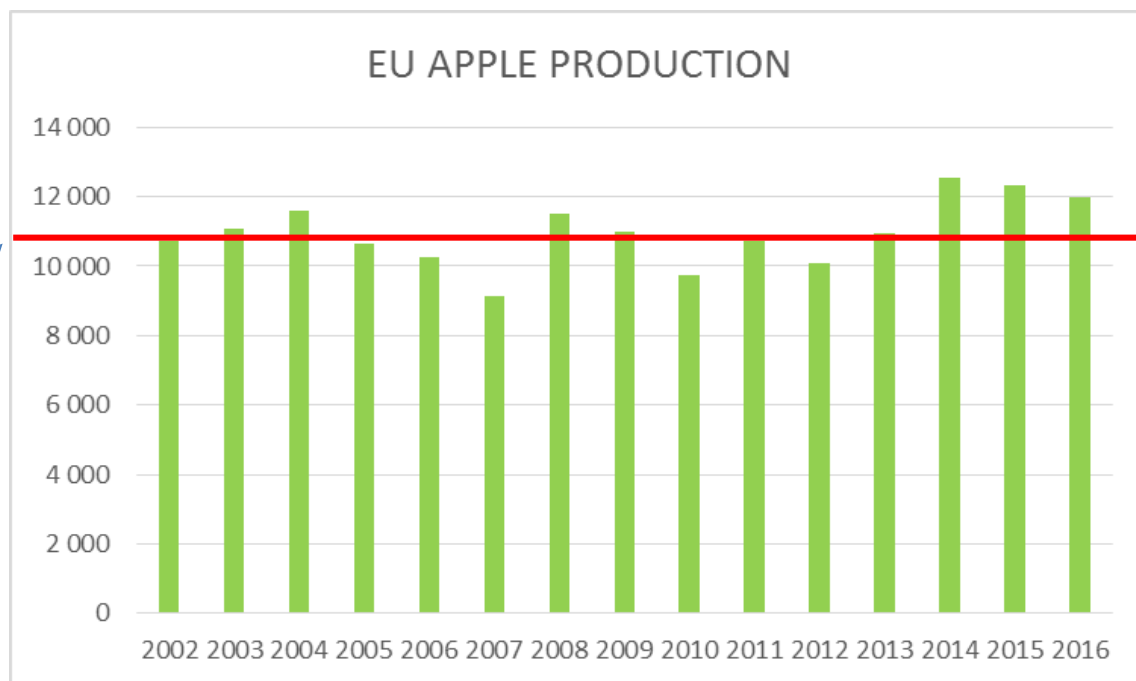
(11.973.992 T YAGO – 12.324.879 T final )





# EU-28 crop 2016 in 10 Y perspective

Year	Prod in T
2014	12 560
2015	12 325
<b>2016</b>	<b>12 004</b>
2004	11 599
2008	11 525
2003	11 086
2009	11 008
2013	10 929
2011	10 746
2002	10 718
2005	10 655
2006	10 275
2012	10 095
2010	9 740
2007	9 131



2016	12.004	
AV 10 Y	10.833	10,8%
AV 5Y	11.331	5,9%
AV 3Y	11.938	0,5%
YAGO	12.325	-2,6%

x 1000 tons

Country	2007	2008	2009	2010	2011	2012	2013	2014	2015	F2016	(1)	(2)
Austria	193	159	185	169	199	157	155	188	177	22	-88	-87
Belgium	358	336	344	288	305	220	220	318	285	234	-18	-15
Croatia	40	49	60	89	83	59	96	62	101	35	-65	-59
Czech Rep	113	157	145	103	79	118	121	131	156	113	-28	-17
Denmark	32	26	24	21	20	18	13	20	24	22	-8	-10
France	1,676	1,528	1,651	1,579	1,701	1,169	1,576	1,444	1,674	1,564	-7	0
Germany	1,070	1,047	1,011	935	993	928	804	1,111	1,075	1,052	9	9
Greece	226	231	224	254	305	242	236	245	242	263	9	9
Hungary	203	583	514	488	301	750	585	920	532	449	-34	-34
Italy	1,599	2,164	2,237	2,179	2,293	1,939	2,122	2,456	2,280	2,282	0	0
Latvia	31	34	13	12	8	9	15	16	8	8	6	27
Lithuania	40	74	74	46	49	39	40	27	46	31	-20	-2
Netherlands	396	376	402	334	418	281	314	353	336	332	-1	-1
Poland	1,100	3,200	2,600	1,850	2,900	2,909	3,170	3,790	3,919	4,150	4	14
Portugal	258	245	274	251	265	221	284	272	329	263	-20	-11
Romania	362	329	379	423	412	351	387	381	366	377	0	0
Slovakia	10	42	48	32	33	36	42	46	40	17	-58	-60
Slovenia	80	68	64	66	73	45	56	68	71	12	-83	-82
Spain	599	528	470	486	507	391	464	505	482	509	6	5
Sweden	16	18	18	20	17	14	17	16	21	20	-5	11
UK	196	201	212	214	226	162	204	225	243	250	3	12
<b>Total:</b>	<b>9,206</b>	<b>11,395</b>	<b>11,008</b>	<b>9,740</b>	<b>10,746</b>	<b>10,095</b>	<b>10,929</b>	<b>12,560</b>	<b>12,325</b>	<b>12,004</b>	<b>-3</b>	<b>1</b>

Strong crop

• Poland (+4%)

• Germany(+8%)

• Greece (+9%)

• Romania (+10%)

Medium low crop

• Belgium (-18%)

• Hungary (-14%)

• Lithuania (-20%)

• Portugal (-20%)

Low crop

• Austria (-88%)

• Croatia (-65%)

• Czech Rep (-28%)

• Slovakia (-58%)

• Slovenia (- 83%)



**+171.000**



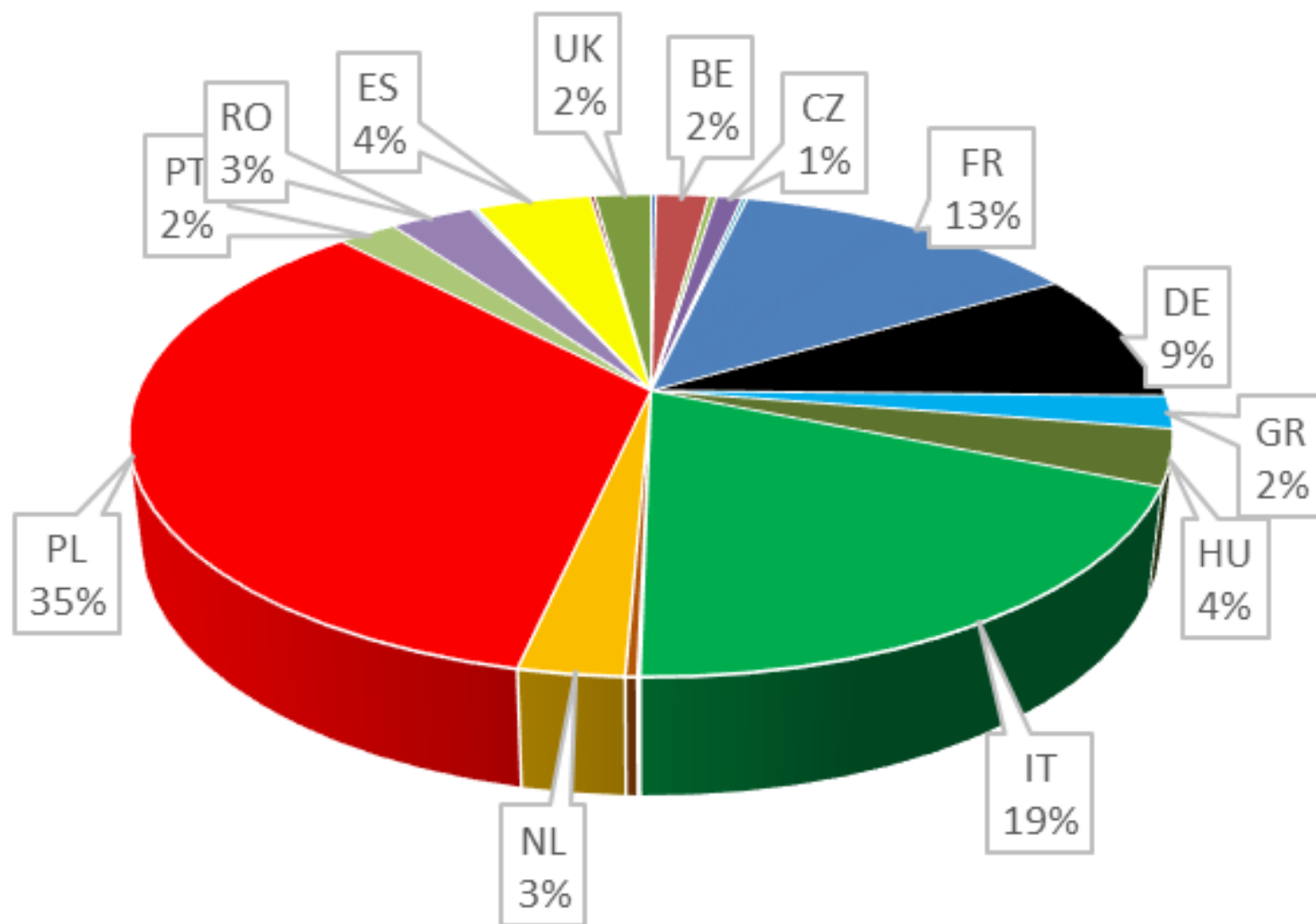
Poland	PL
Germany	DE
Romania	RO
Spain	ES
Greece	GR
UK	UK
Italy	IT
Latvia	LV
Sweden	SW
Denmark	DK
Netherlands	NL
Lithuania	LT
Slovakia	SK
Czech	CZ
Belgium	BE
Slovenia	SL
Croatia	HR
Portugal	PT
Hungary	HU
France	FR
Austria	AU

171  
79  
35  
27  
21  
7  
2  
0  
-1  
-2  
-4  
-9  
-23  
-43  
-51  
-59  
-66  
-66  
-73  
-110  
-155

*in 000 T*



# Share of production 2016



# 2016 crop forecast – EU28

12.004.797 T (21 MS)

+ ca 89.240 T (remaining MS – FAO data)

	x 1000 tons								
Country	2007	2008	2009	2010	2011	2012	2013	2014	2015
Bulgaria	26,17	23,50	35,46	43,20	40,40	30,94	55,01	54,50	58,42
Estonia	2,10	0,50	1,80	0,80	1,20	1,00	2,40	1,20	1,60
Ireland	N/A	15,59	13,08	21,06	20,44	12,10	15,22	19,62	18,79
Cyprus	8,59	6,54	7,12	7,12	6,84	5,31	4,85	5,10	
Luxembourg	2,23	3,08				1,82	1,93	2,62	2,42
Finland	3,48	4,28				4,81	4,81	5,34	6,03






92.000 T  
-3% for 2016 (?)  
89.240 T

**EU-28: 12.094.037 T**

+ Switzerland: 134.000 T



# 2016 NH crop forecast – non EU

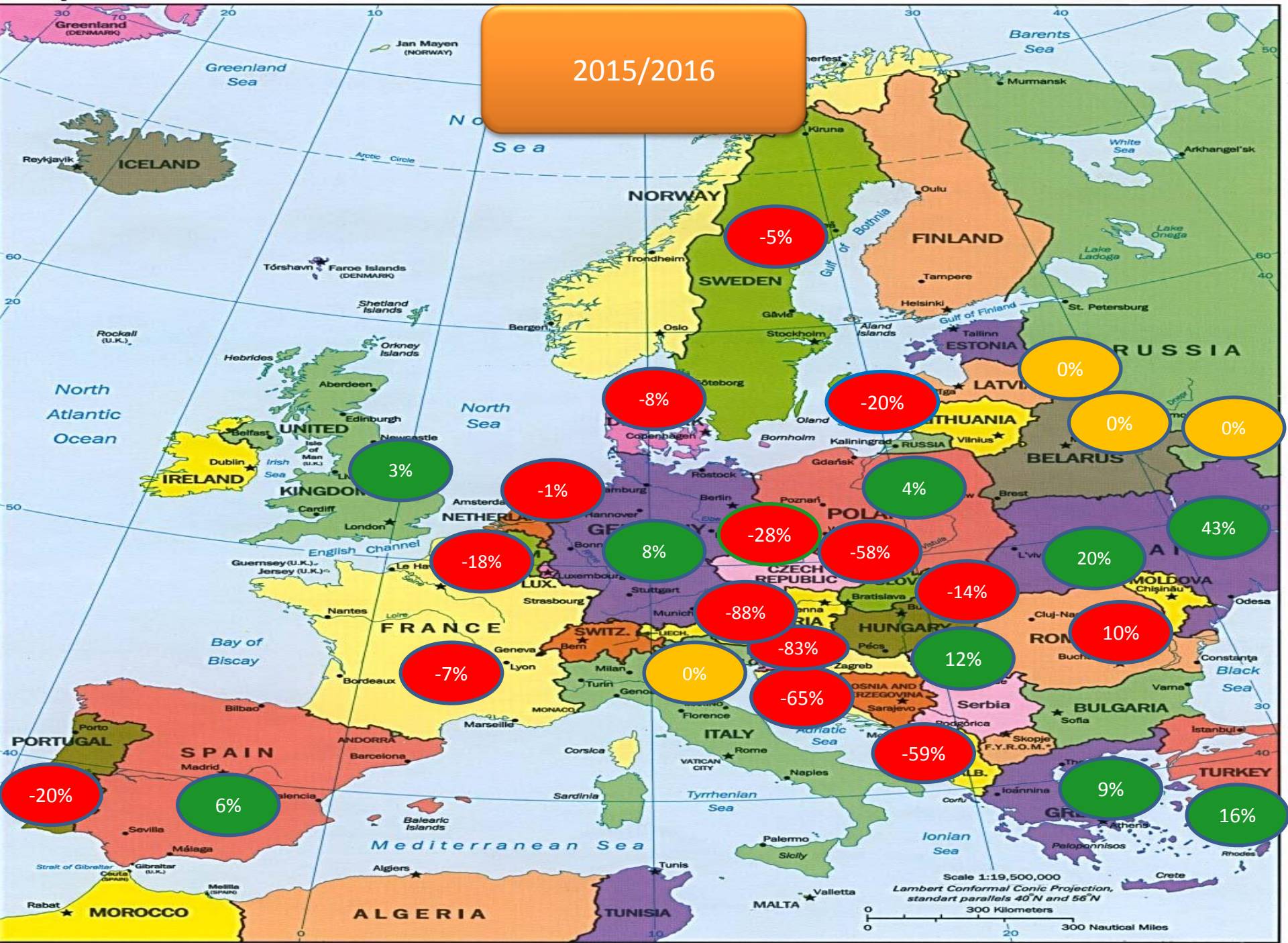
											<i>x 1000 tons</i>	
<i>Country</i>	<i>2007</i>	<i>2008</i>	<i>2009</i>	<i>2010</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>F2016</i>	<i>(1)</i>	<i>(2)</i>
Belarus	300	240	250	150	180	171	145	160	155	155	0	1
Bosnia-Herzegovin	61	52	72	72	75	50	85	61	69	28	-59	-61
Canada	423	322	404	383	398	276	410	410	283	351	24	-5
China 	27,860	29,847	31,681	33,263	35,985	38,500	39,683	40,923	43,112	43,000	0	4
Macedonia	152	175	106	122	128	127	113	85	70			
Mexico	505	512	561	585	631	375	522	350	717	600	-16	13
Moldova	218	255	210	208	269	282	260	420	250	300	20	-3
Norway	9	13	10	9	5	6	7	8	5	8	55	24
Russia 	2,333	1,467	1,775	1,233	1,036	1,258	1,470	1,647	1,707	1,736	2	8
Serbia	245	236	282	240	266	179	332	317	356	400	12	19
Switzerland	155	136	167	127	155	141	132	143	140	134	-5	-3
Turkey 	2,400	2,457	2,518	2,402	2,432	2,445	2,681	2,109	2,466	2,851	16	18
Ukraine 	1,172	1,079	854	950	954	1,127	1,211	1,082	1,196	1,209	1	4
USA 	4,123	4,371	4,402	4,210	4,273	4,110	4,635	5,131	4,473	5,017	12	6

2015/2016

Percentage change in the number of people aged 65 and over for the period 2015/2016:

- Iceland: -20%
- Spain: -20%
- Portugal: -20%
- Morocco: -20%
- France: -7%
- Ireland: -18%
- United Kingdom: -1%
- Germany: -8%
- Netherlands: -1%
- Switzerland: -8%
- Italy: -65%
- Greece: -59%
- Turkey: 16%
- Bulgaria: 9%
- Romania: 10%
- Poland: -58%
- Czech Republic: -14%
- Hungary: -83%
- Slovakia: -28%
- Austria: -20%
- Latvia: 0%
- Lithuania: 0%
- Estonia: 0%
- Finland: -5%
- Sweden: -8%
- Norway: -5%
- Russia: 43%
- Belarus: 20%
- Moldova: 20%
- Ukraine: 43%

2015/2016

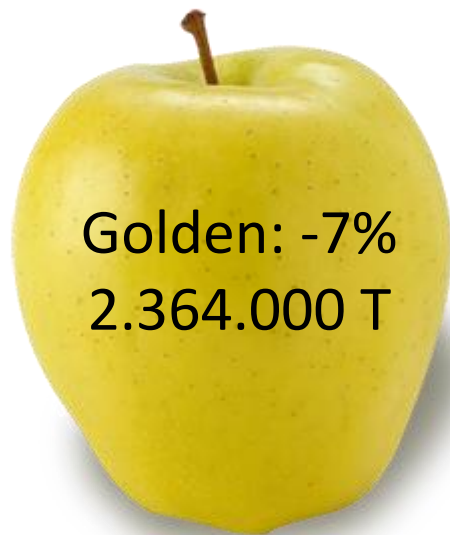




Variety	2007	2008	2009	2010	2011	2012	2013	2014	2015	F2016	(1)	(2)
Annurca	51	45	35	34	35	35	35	40	35	35	0	-5
Boskoop	100	100	82	60	73	58	58	85	92	71	-23	-9
Braeburn	318	295	338	289	324	264	302	321	312	322	3	3
Bramley	85	85	85	85	84	58	70	83	84	85	1	8
Cortland	75	100	100	100	100	100	100	25	26			
Cox Orange	108	108	108	108	108	108	108	32	34	29	-17	-21
Cripps Pink	73	73	73	73	73	73	73	249	244	260	7	15
Elstar	489	489	489	489	489	489	489	431	399	394	-1	1
Fuji	188	200	200	200	200	200	200	321	338	309	-9	-4
Gala	1,024	1,024	1,024	1,024	1,024	1,024	1,024	1,328	1,382	1,329	-4	2
Gloster	94	100	100	100	100	100	100	201	183	193	6	0
Golden Delicious	2,530	2,530	2,530	2,530	2,530	2,530	2,530	2,677	2,534	2,364	-7	-8
Granny Smith	306	313	343	342	413	302	361	383	405	390	-4	2
Idared	388	895	828	619	692	986	1,069	1,192	1,129	1,064	-6	-6
Jonagold	660	812	742	544	652	475	500	644	633	565	-11	-5
Jonagored	234	190	190	190	190	190	190	491	519	535	3	19
Jonathan	148	350	350	350	350	350	350	193	143	123	-14	-28
Lobo	100	200	200	200	200	200	200	30	31			
Morgendurf/impera	88	88	88	88	88	88	88	74	46	66	44	12
Pinova	20	30	30	30	30	30	30	79	100	90	-10	12
Red Delicious	629	760	760	760	760	760	760	675	643	633	-2	-1
Red Jonaprince		300	300	300	300	300	300	98	104	159	52	87
Reinette Grise du	103	80	80	80	80	80	80	126	134	120	-10	-5
Shampion	172	395	323	257	327	423	457	494	513	520	1	6
Spartan	12	11	8	6	6	6	6	6	6	4	-34	-31
Stayman	19	18	16	18	17	12	18	14	14	14	-1	-9
Other new varieties	17	65	108	134	152	350	412	459	465	530	14	19
Other	1,173	1,804	1,652	1,495	1,541	1,377	1,358	1,809	1,776	1,801	1	9
<b>Total:</b>	<b>9,206</b>	<b>11,395</b>	<b>11,008</b>	<b>9,740</b>	<b>10,746</b>	<b>10,095</b>	<b>10,929</b>	<b>12,560</b>	<b>12,325</b>	<b>12,004</b>	<b>-3</b>	<b>1</b>

- Red Jonaprince : + 55.000T
- Morgendurf : + 20.000T
- Cripps Pink : +16.000 T
- Jonagored : + 16.000 T
- Braeburn: + 10.000 T
- Gloster: + 10.000 T

- Golden : -170.000 T
- Jonagold :-68.000 T
- Gala :-53.000 T
- Idared : -45.000 T
- Lobo : - 31.000 T
- Fuji : - 29.000 T



Golden: -7%  
2.364.000 T



Gala: -4%  
1.329.000 T

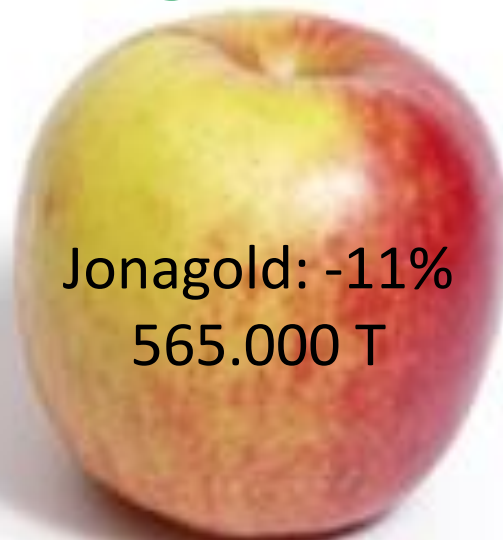


Idared: -6%  
1.064.000 T

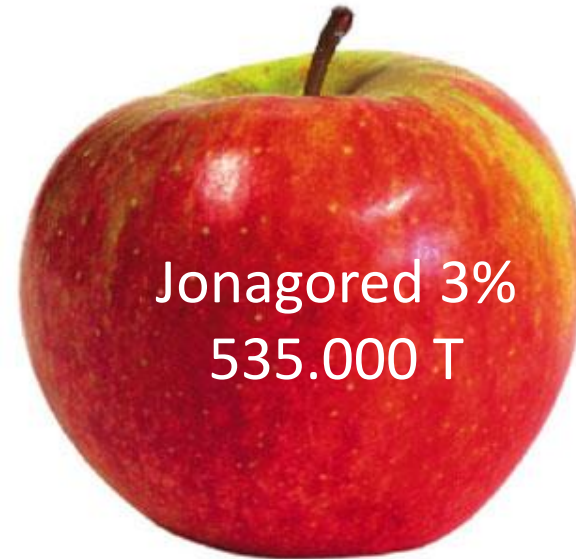
## Leading varieties



Red Del: -2%  
633.000 T

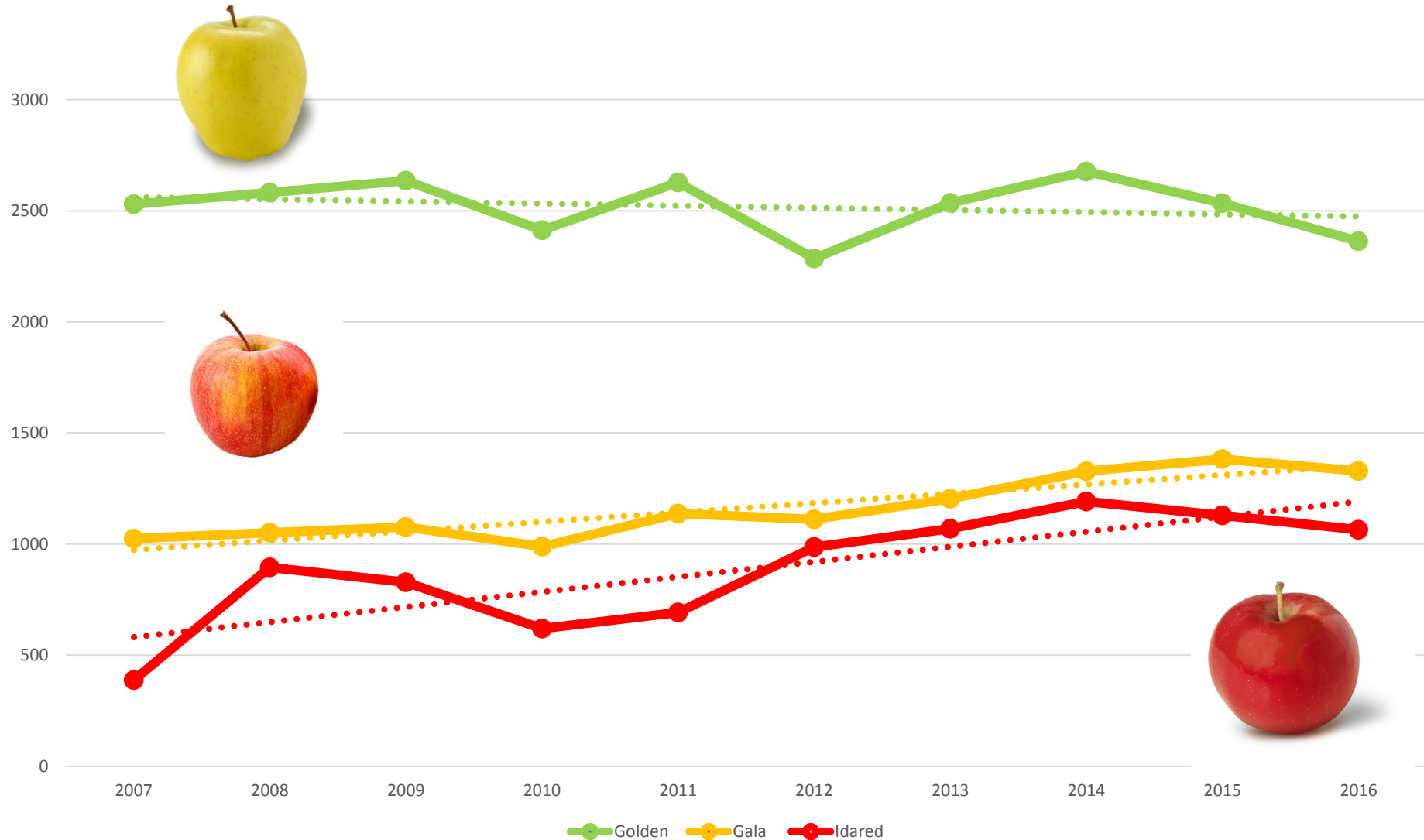


Jonagold: -11%  
565.000 T

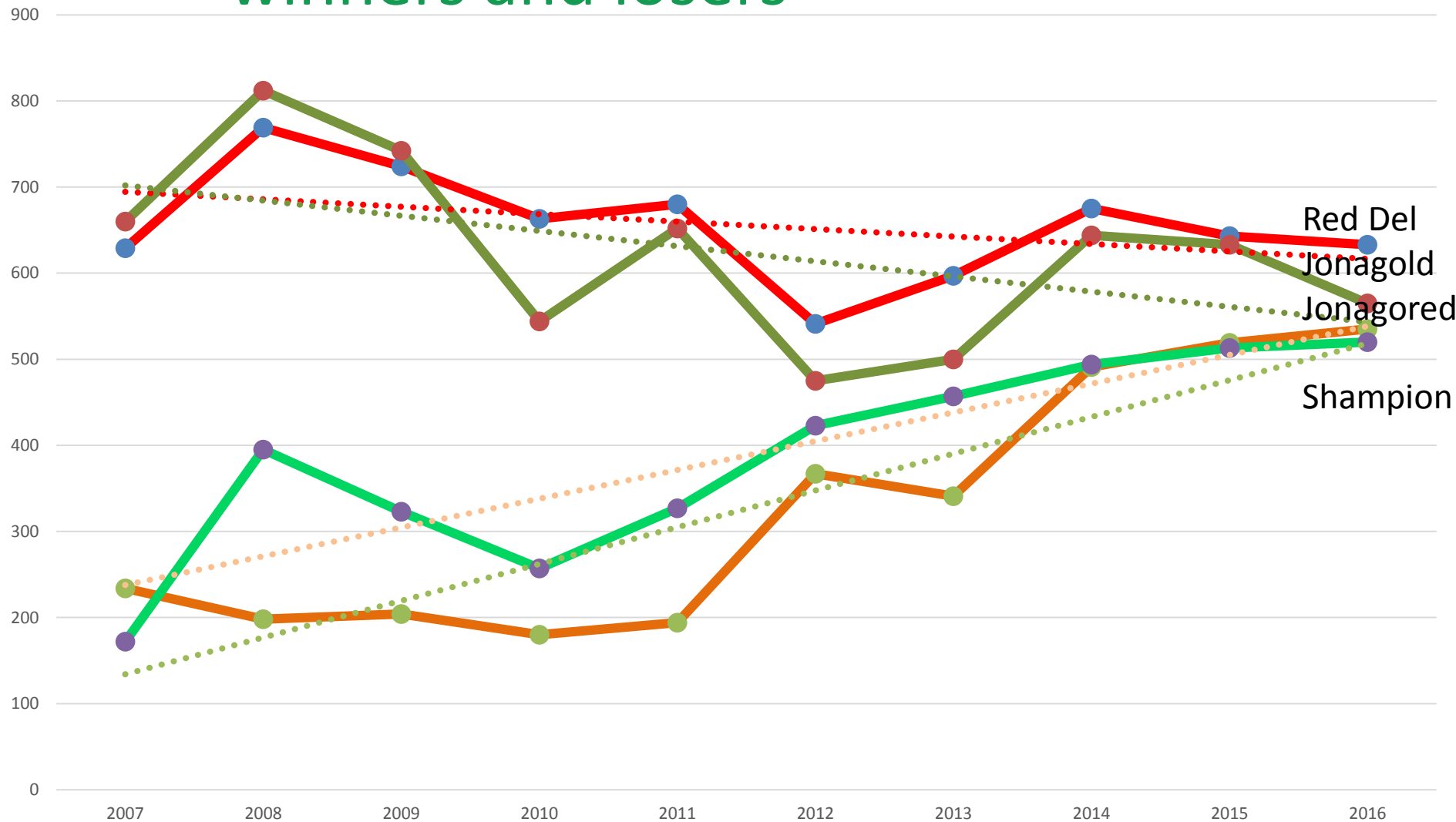


Jonagored 3%  
535.000 T

# Trends (1) - The volume leaders winners and losers

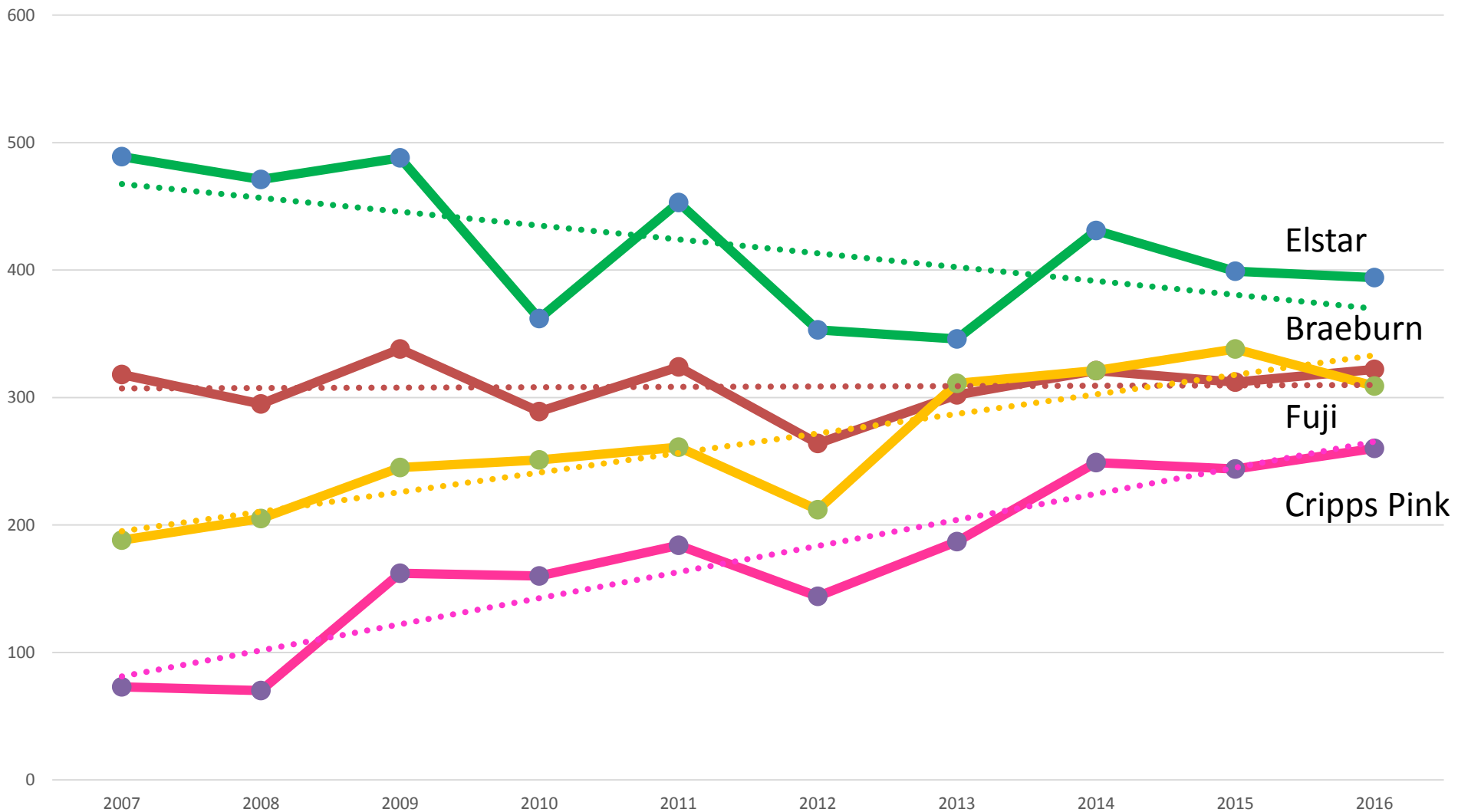


# Trends (2) the 500 to 600.000 T winners and losers





# Trends (3) - The 250 to 400.000 T winners and losers



# Trends (4) - Organic apples

<b>Austria</b>	15%
<b>Germany</b>	7%
<b>France</b>	5%
<b>Romania</b>	5%
<b>Italy</b>	4%
<b>Netherlands</b>	4%
<b>UK</b>	4%
<b>Slovenia</b>	3%
<b>Belgium</b>	2%
<b>Czech</b>	2%
<b>Greece</b>	1%



<b>Country</b>	<b>in 000 T</b>
<b>Italy</b>	91
<b>France</b>	78
<b>Germany</b>	74
<b>Romania</b>	19
<b>Netherlands</b>	13
<b>UK</b>	10
<b>Belgium</b>	5
<b>Greece</b>	3
<b>Czech</b>	2
<b>Austria</b>	2
<b>Slovenia</b>	0
<b>Total</b>	<b>297</b>

# Apples processing 2015-2016

Volume for apples processing in selected countries



## Fresh market balance 2016:

Production for fresh:

12.004.000 - 3.969.000 =

**8.035.000 T**

**( + shortage of ca 300.000 T  
in central Europe**

**( v. 8.505.000 T in 2015 )**

Country	2015	2016
Poland	2.188	2.490
Hungary	355	292
France	301	282
Germany	263	263
Italy	228	228
Romania	91	100
UK	78	95
Belgium	108	70
Greece	48	53
Czech	78	45
Netherlands	34	33
Croatia	30	11
Lithuania	7	6
Slovenia	11	2
Total	3.820	3.969

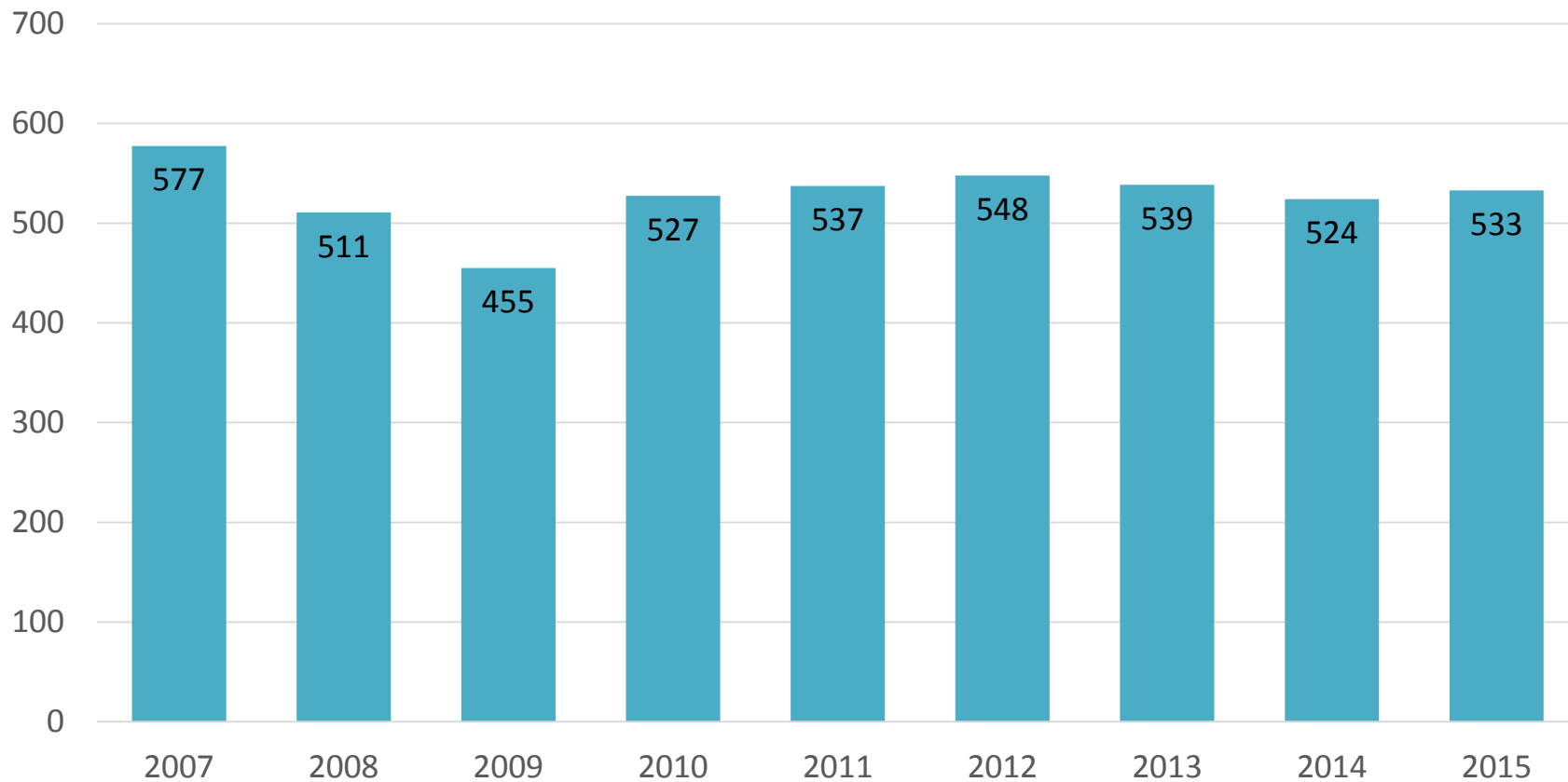
Covering  
+/-93% of  
EU crop

# Apple orchard review



# Ha Apple total EU

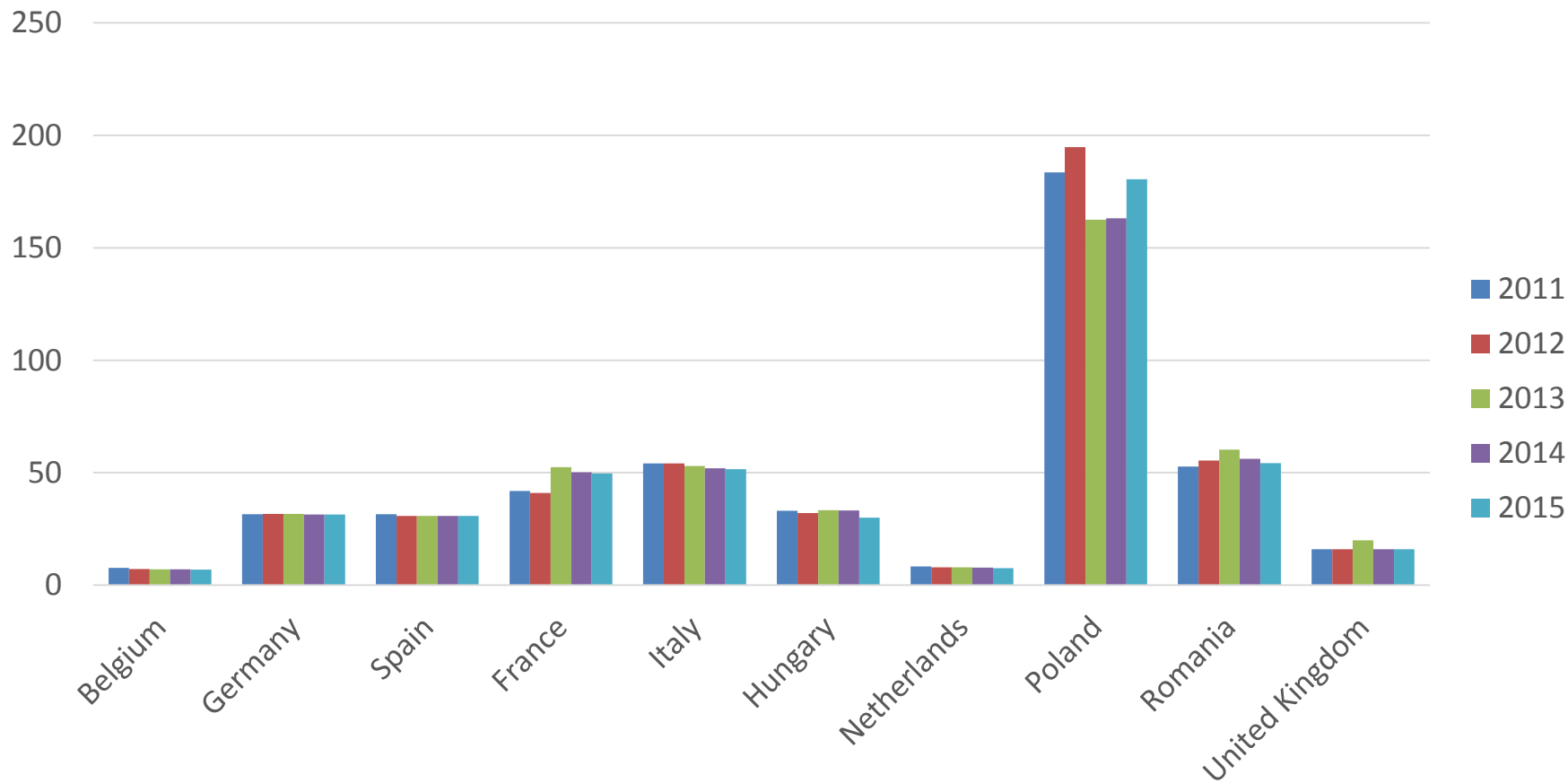
Area (cultivation/harvested/production) (1000 ha)





# Ha Apple per country

Area (cultivation/harvested/production) (1000 ha)



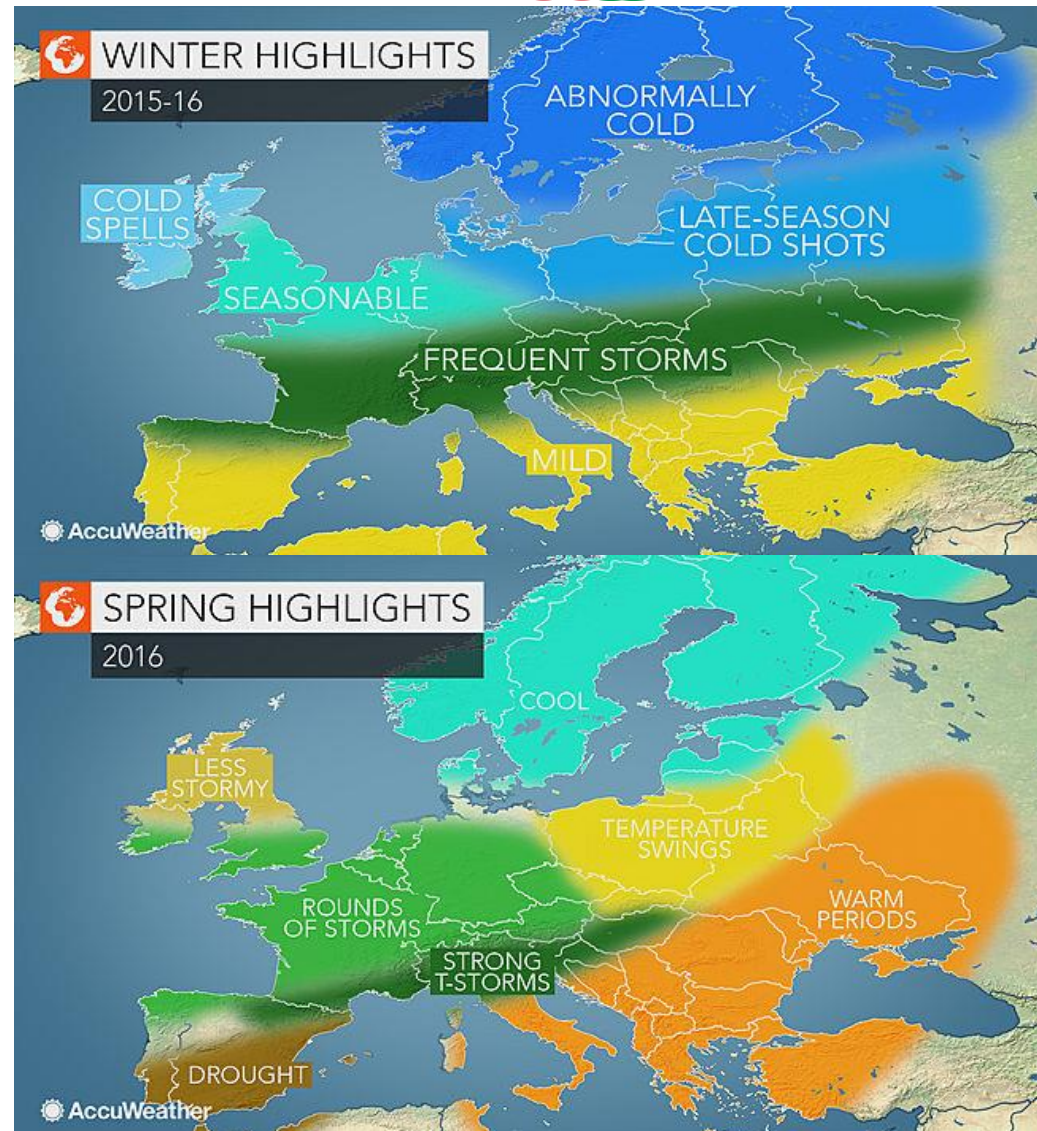
# APPLE forecast 2016

## QUALITATIVE and country review



# Climatic conditions overview

- Overall normal to relatively mild winter
- Wet conditions during flowering
- Limited frost damage during flowering , except central-east Europe frost 26-30 April
- Lack of light (UK - BE)
- Some punctual summer storms leading to wind and hail damages (Benelux, DE, PL)
- Drought affecting some Southern countries (PT) and heath wave (central Europe)
- Season timing , normal in most of the region, with slight tendency for later picking by a few days (FR, UK Lt, CZ), earlier in DE HU, GR



# 26-30 April 2016

## AREAS OF CONCERN - EXTREME WEATHER EVENTS

Based on weather data from 22 April 2016 until 27 May 2016



/// Rain surplus    \\\ Rain deficit    --- Cold spell

## NUMBER OF COLD DAYS

from : 24 April 2016  
to : 30 April 2016

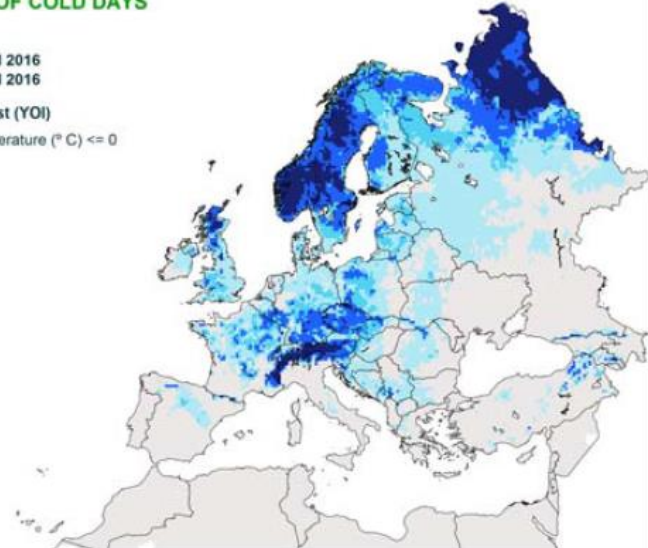
Year of interest (YOI)

Minimum temperature ( $^{\circ}$  C)  $\leq 0$

Unit: days



20/05/2016  
resolution: 25x25 km



© European Union 2016  
Source: Joint Research Centre (JRC COMS 12)  
Processed by Alterra consortium

## Dramatic consequences (compare to YAGO):

- Austria 22.000 T v. 177.000 T
- Slovenia 12.000 T v. 71.000 T
- Croatia 35.000 T v. 101.000 T
- Slovakia 17.000 T v. 40.000 T
- Czech Rep 113.000 T v. 156.000 T
- Hungary 449.000T v. 522.000 T



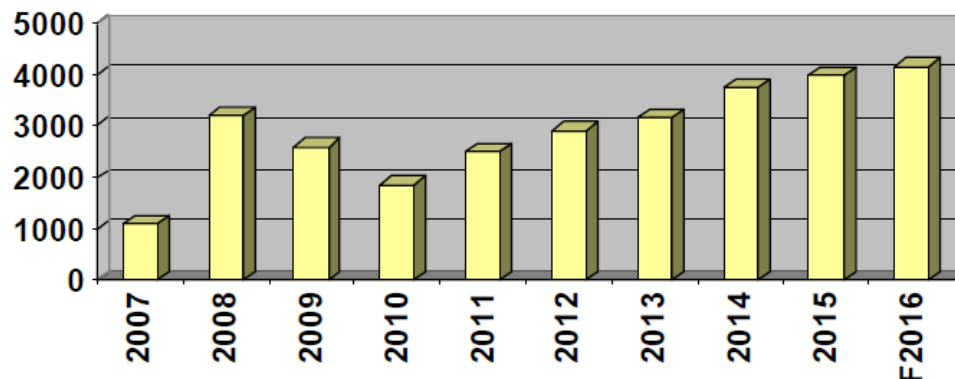




# Poland

- Updated last year crop based on final market outreach, in particular for Red Del, Red Jonaprince, Jonagored :
  - Processing : up to 2,3 Mio T (csq of scab – move too processing late in the season)
  - Intra EU and Export : up to 900.000 T
  - Domestic (including 134.000 T free distribution) ca 750.000 T Stocks empty for new season
- 2016 => +4% to 4.150.000 T
  - Expected similar business pattern than 2015
  - Some consequences of drought and hails ( more fruit to go straight to industry ), no frost, no heat wave so far
  - Picking time according to normal scheme, size on average
  - Strong crop even of Idared ( 800,000 T), Shampion ( 500,000 T), Jonagored (350,000 T) and Gloster (180.000 T)

**Poland - Apple production**







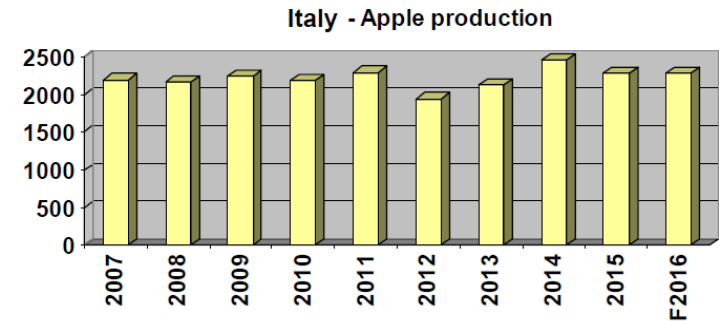
# Italy- France



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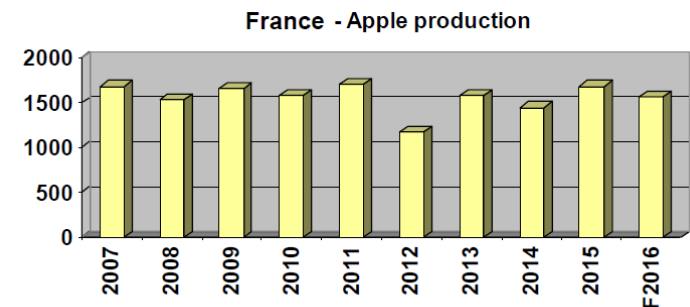
## Italy

- Stable crop at 2.282.000 T
- Overall no major climatic concerns, normal average size, limited hail damages, frost only limited outreach
- Varieties: Cripps Pink > 100.000 T, Gala peak high at 339.000 T and early and Golden peak low at 907.000 T



## France

- Slight decrease by 7% at 1.564.000 T
- Normal flowering (though some wind, cold and wet) and weak fruit setting
- Late start, concern on sizes(?)
- Golden, Red, Braeburn declining and replaced by Gala and new varieties – overall stable/ small decline orchards





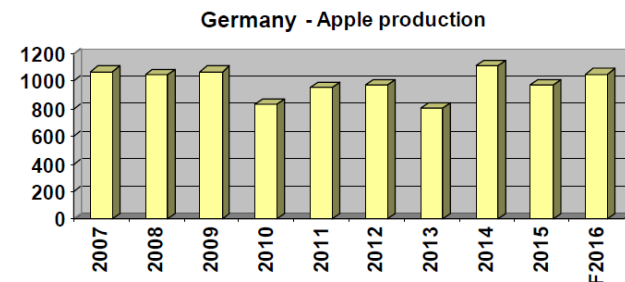
# Germany – Benelux



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3 - 5 August 2016, Hamburg

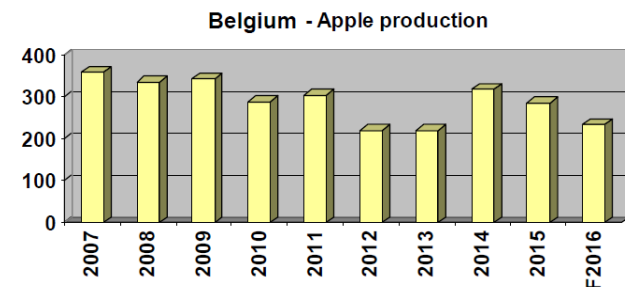
## Germany

- Recovery towards average crops >1 Mio T despite some end April frost in part of Bodensee, and some hail damage in South Rheinland; Strong to long blossoming ;Strong fruit setting but also strong physiological drop
- Good size, earlier picking but normal start of season
- Elstar : leading varieties > 200.000 T



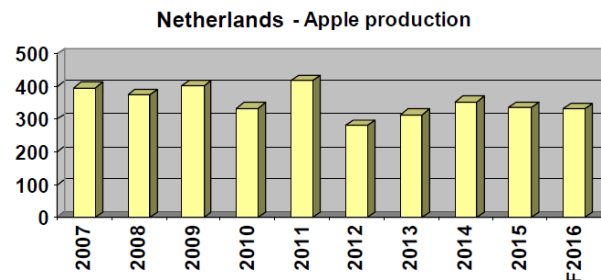
## Belgium

- Crop decreased by 18 % to 233.000T => Excessive rainfall in first semester ( scab pressure) , storm on 23 June (wind & hail), poor conditins for first part of blossoming. Less sunshine , severe June drop
- Size Jonagold & mutants > large



## The Netherlands

- Average crop (-1% to YAGO and 3YAV) , 332.000T
- Normal colouring and sizing, no frost ,limited hail





# UK –Scandinavia –Baltic



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## UK

- Crop 3% up –largest of last decade with large crop of Gala (new bearings into production) and strong Braeburn (large size).
- No major climatic havoc , wet soil lack of lights
- Season 2 weeks later

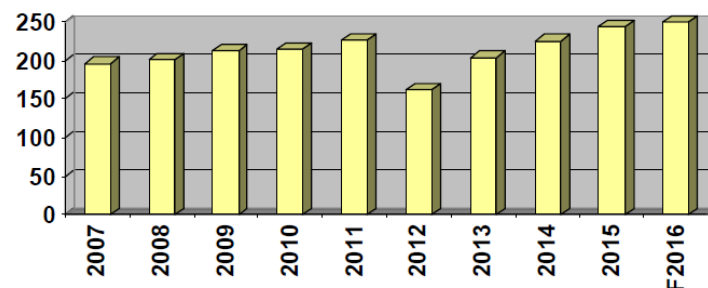
## Denmark

- Crop lower by 8 % to previous year. Blossoming more difficult for main variety Elstar

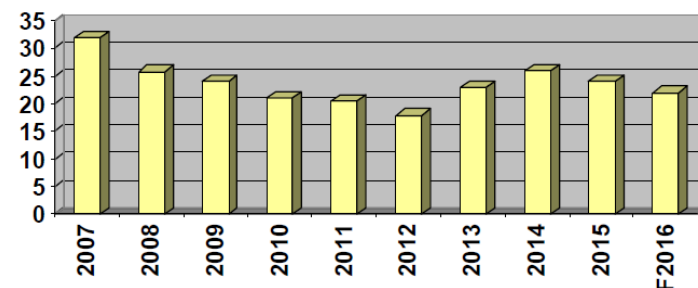
## Lithuania

- Overall good growing conditions , rare hail , normal size , good colouring – season late by a few days

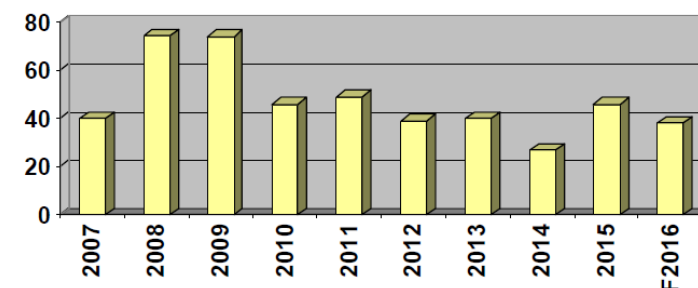
UK - Apple production



Denmark - Apple production



Lithuania - Apple production





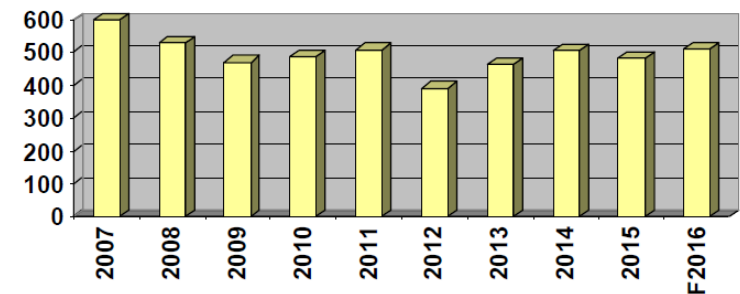
# South West



## Spain

- Crop up by 6%, warm winter, and mild & wet spring, some hail in May –June but limited impact, despite some diversification, Golden remain > 50%
- Catalonia pushing crop up while Aragon and Castilla stable or slightly declining

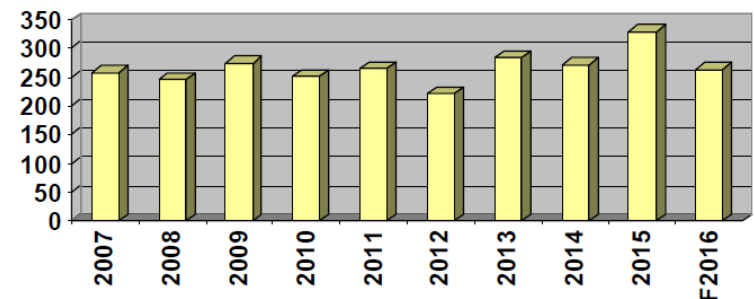
Spain - Apple production



## Portugal

- Crop declining by 20% to 263.000 T
- Hot and dry weather, leading to small size and delay by 20 to 30 days

Portugal - Apple production



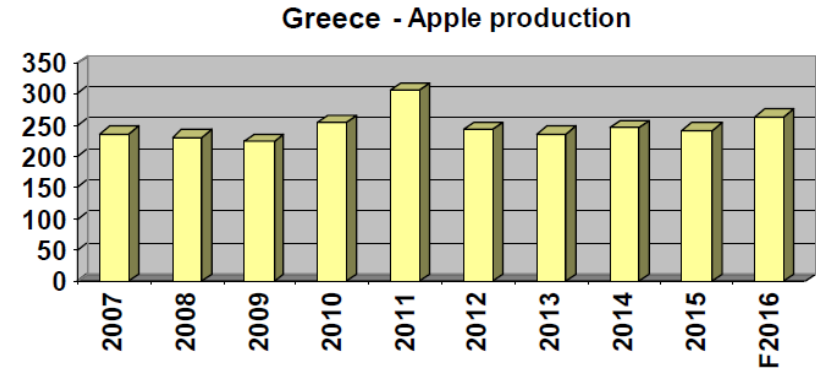


## South East



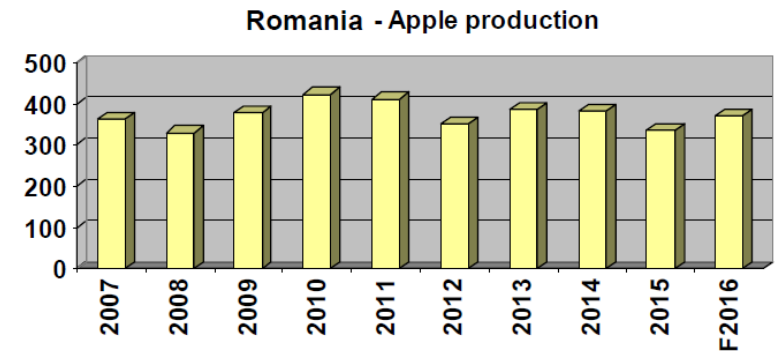
### Greece

- One of the large crop of the decade, no particular climatic concerns so far, normal size and colouring
- Picking about 10 days earlier than last year
- Evolution of orchard towards Fuji and Gala, Green varieties replacing Red



### Romania

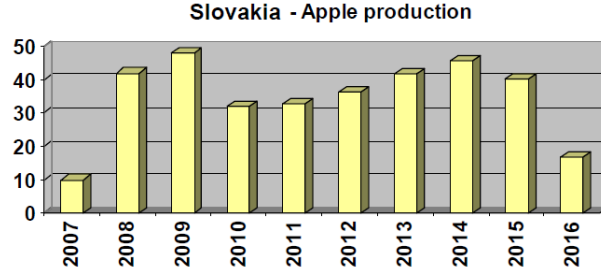
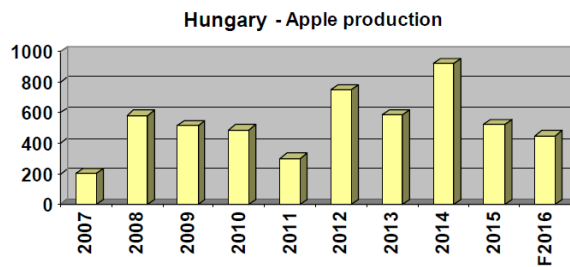
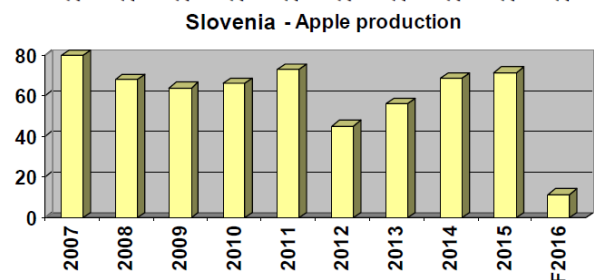
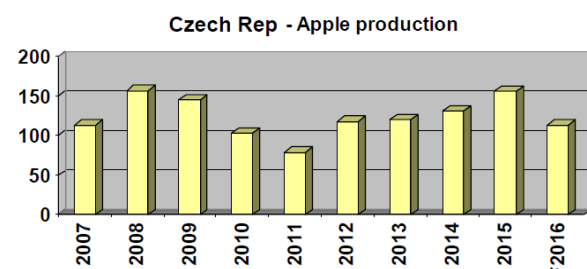
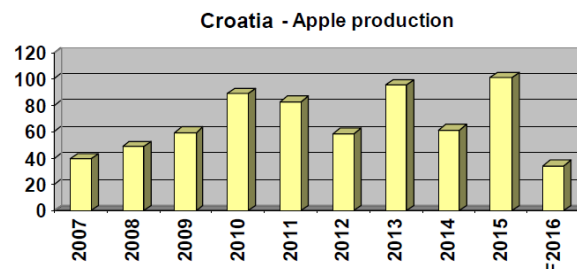
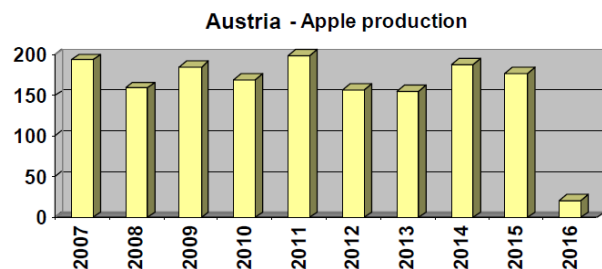
- Average crop , but recovery after small crop last year. Crop est at 371.000 T
- Cold winter, then warmer weather in spring, occasional heavy hail.
- Normal size and picking time. Good colouring.
- Main varieties: Holsteiner Cox, Golden, Jonathan





# Alps and balkans central Europe

- Austria (-88%) and Slovenia (-83%) most affected by frost from 26-29 April at -6°C, 2 weeks after abundant blossoming – worst damage for at least 50 years .
- Croatia (-65%) and Hungary (-14%) also affected by late April frost- fruit drop ,End of June heat wave and severe hailstorms in NE region of HU mid June , Picking in HU and HR up to two weeks earlier, Bosnia similarly affected (-59%). Serbia (+12%) not affected by 60% increase of trees in last 8 years,
- Czech Republic (-28%) and Slovakia (-58%) , with significant damages end of April during blossoming
- Switzerland: no major crop of frost end April , only -2°C, smaller fruit, picking 1 week later





# EU neighbourhood



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## Turkey

- Expected peak crop at 16% up reaching 2,8 million T – excellent weather conditions, 15% to processing, 5-6% exported.
- Size and colouration on average , picking time as well

## Ukraine

- Despite, negative climatic conditions at different moments, crops could equal last year at 1,2 million T . Some quality concerns are expected
- 50% of production to processing, including increase of AJC to the EU while limited fresh apples export

## Russia

- Production at 1,736 million T including production from Crimea ( 68,000 T), crop is therefore slightly lower. RU processing 500.000 T. Import drop after embargo to 550.000 T (official statistics ) + and estimated unaccounted est. at 230.000 T



# North America

## USA

- “Premier” estimate leading to crop over 5 million T (fresh & processed)
- If confirmed =4th large crop , also driven by strong crop in WA +Early picking in WA v. East coast late
- Importance of strong on-going trends for varietal evolution and reduced role of Golden towards Gala, Honeycrisps, Fuji
- Development of organic towards 300,000 T by 2018.

## Canada

- Recovery (+ 24%) at 351.000 T after small 2015 crop . Ontario (+ 66%) , and BC (+11%) , NovaScotia & New Brunswick (+7%) while other regions more stable ( Quebec (+2%)

## Mexico

- 600.000 T, -16% to last year peak at 717.000 T
- 70% for fresh, 30% to processing. Golden (55%) of crop and Red Del (34%)
- Mexico applied an ant-dumping duty from 6 January and revoked on 7 June



# China

- China: forecast kept at 43 Mio T, in between MOA views of a 5% increase and processors in main producing provinces indicating at decrease by 5%
- Shaanxi & Shandong representing 50% of Chinese production
- 72% Fuji, 24% Gala, 4% Guoguang
- Market
  - Import : 52.000 T
  - Export 800.000T
  - Processing 4.3 Mio T

# Southern Hemisphere 2016

## Production

### Apples

*x 1000 tons*

<i>Country</i>	<i>2008</i>	<i>2009</i>	<i>2010</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>F2016</i>	<i>(1)</i>	<i>(2)</i>
<b>Argentina</b>	980	933	800	1,048	853	930	890	834	640	-23	-28
<b>Australia</b>	262	263	255	260	293	289	275	309	311	1	7
<b>Brazil</b>	983	1,053	1,226	1,250	1,184	1,063	1,165	1,145	1,100	-4	-2
<b>Chile</b>	1,770	1,811	1,755	1,784	1,806	1,755	1,667	1,678	1,635	-3	-4
<b>New Zealand</b>	434	466	448	513	476	550	478	554	548	-1	4
<b>South Africa</b>	749	747	775	768	813	907	794	863	883	2	3
<b>Total</b>	<b>5,178</b>	<b>5,272</b>	<b>5,260</b>	<b>5,623</b>	<b>5,426</b>	<b>5,494</b>	<b>5,269</b>	<b>5,383</b>	<b>5,117</b>	<b>-5</b>	<b>-5</b>





# Southern Hemisphere 2016



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## Export

Country (MT)	2013	2014	2015	F2016
Argentina	163,500	145.600	118.116	120.000
Australia		1.800	3.600	3.700
Brazil	85,467	44.294	60.112	65.000
Chile	832,000	808.000	612.000	670.362
New Zealand	324,685	310.668	330.513	347.763
South Africa	434,663	339.321	413.096	423.557
<b>TOTAL</b>	<b>1,840,315</b>	<b>1.649.683</b>	<b>1.537.437</b>	<b>1.630.382</b>



**CLOSING REMARKS**



# Conclusions

- 2016 crop estimate lower than 2015 output, but less volume expected for fresh market
- Almost “clean” start
  - Stocks phasing out timely
  - Kick off picking on average
  - little pressure from SH fruit – little or no overlap
  - but on-going low price heritage from last season
- On-going concerns
  - Price pressure affecting most varieties
  - Market access as Russian embargo goes on, no easy substitution => less attractive scheme of exceptional measures but adjusted withdrawal prices
  - Consumption to be stimulated by quality and adaptability towards varieties demanded by consumers
  - Impact exchange rates (£, €, \$)





[www.wapa-association.org](http://www.wapa-association.org)  
[www.prognosfruit.eu](http://www.prognosfruit.eu)