Apple Market
Analysis & Trends

PROGNOSFRUIT - CONGRESS 2016

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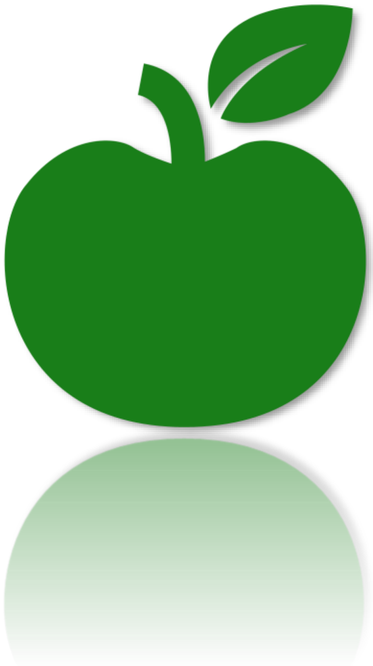
natürlich informiert.

Development of apple market

Analysis for the next season possible?

Facts

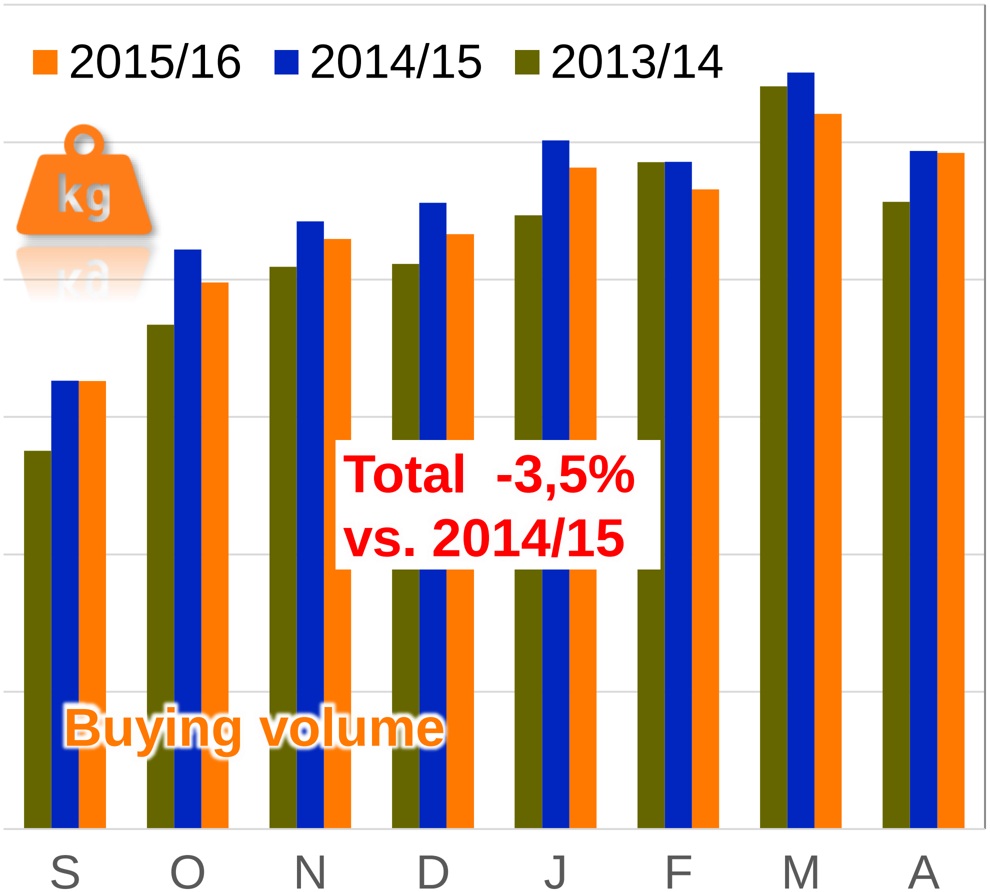
- Forecast apples
- Russian ban continueing?
- Political situation in Arabic countries?
- Opening new markets (China)?

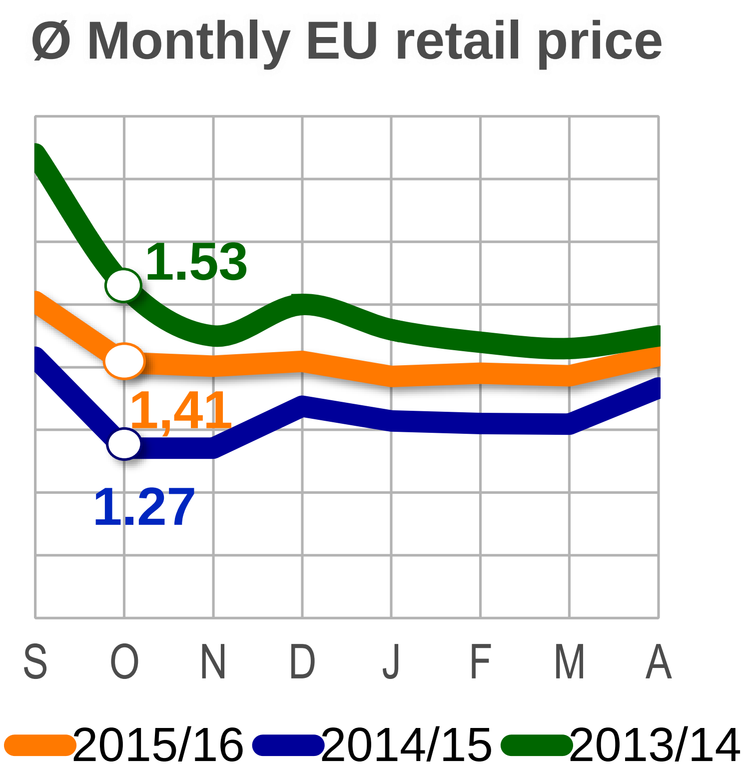


Apple market - became a political football

Less EU apple consumption

Germany, Italy, Spain, France – Monthly consumption and retail price



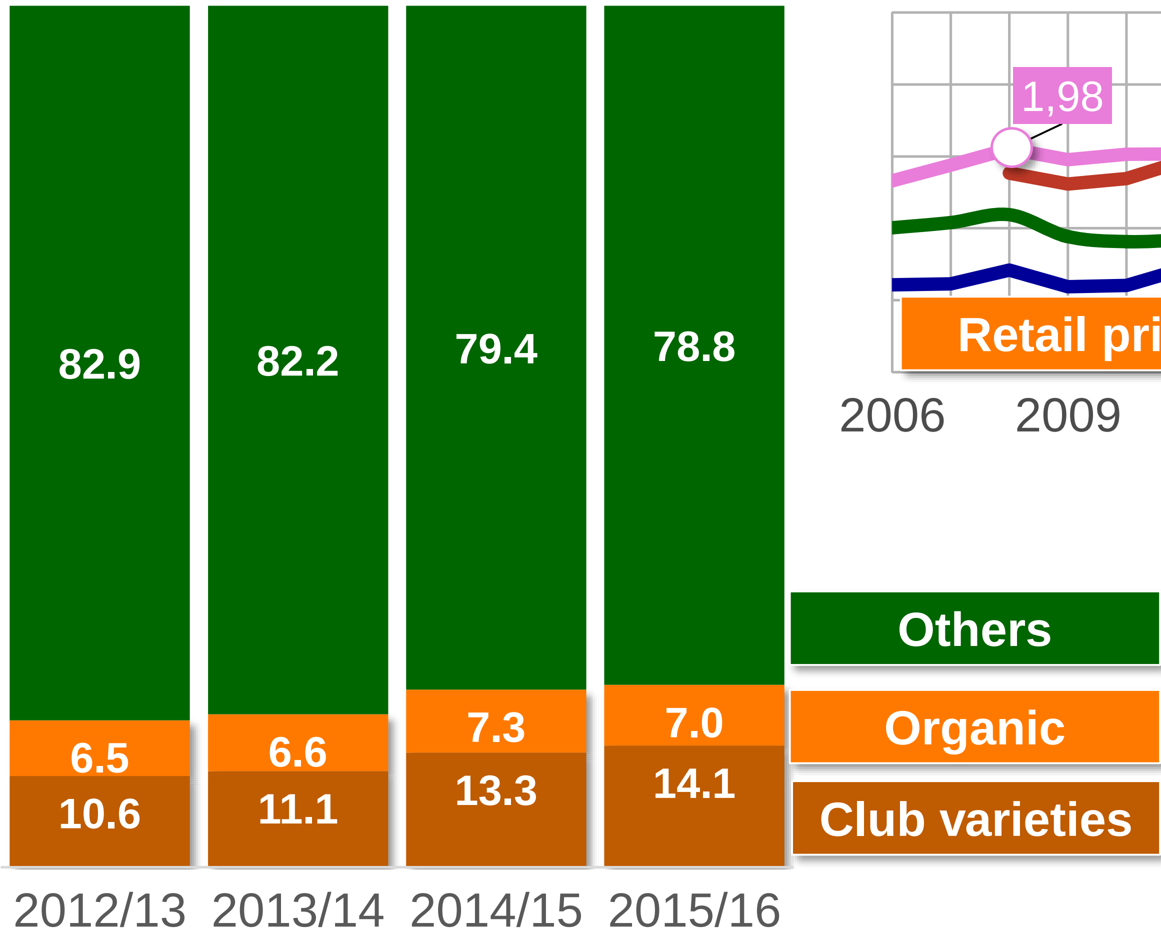


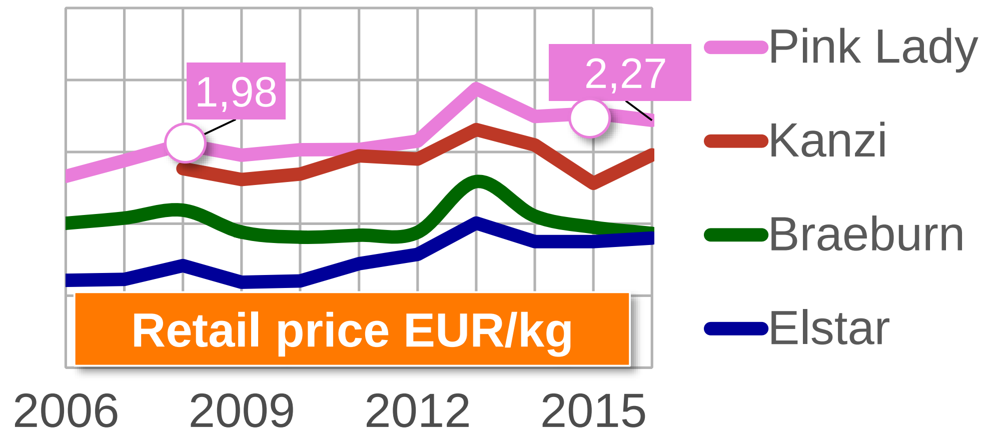
Source: AMI, European panel data

Germany - Year by year less consumption

AMI

Retail – Apple sales volume, August to June (%)



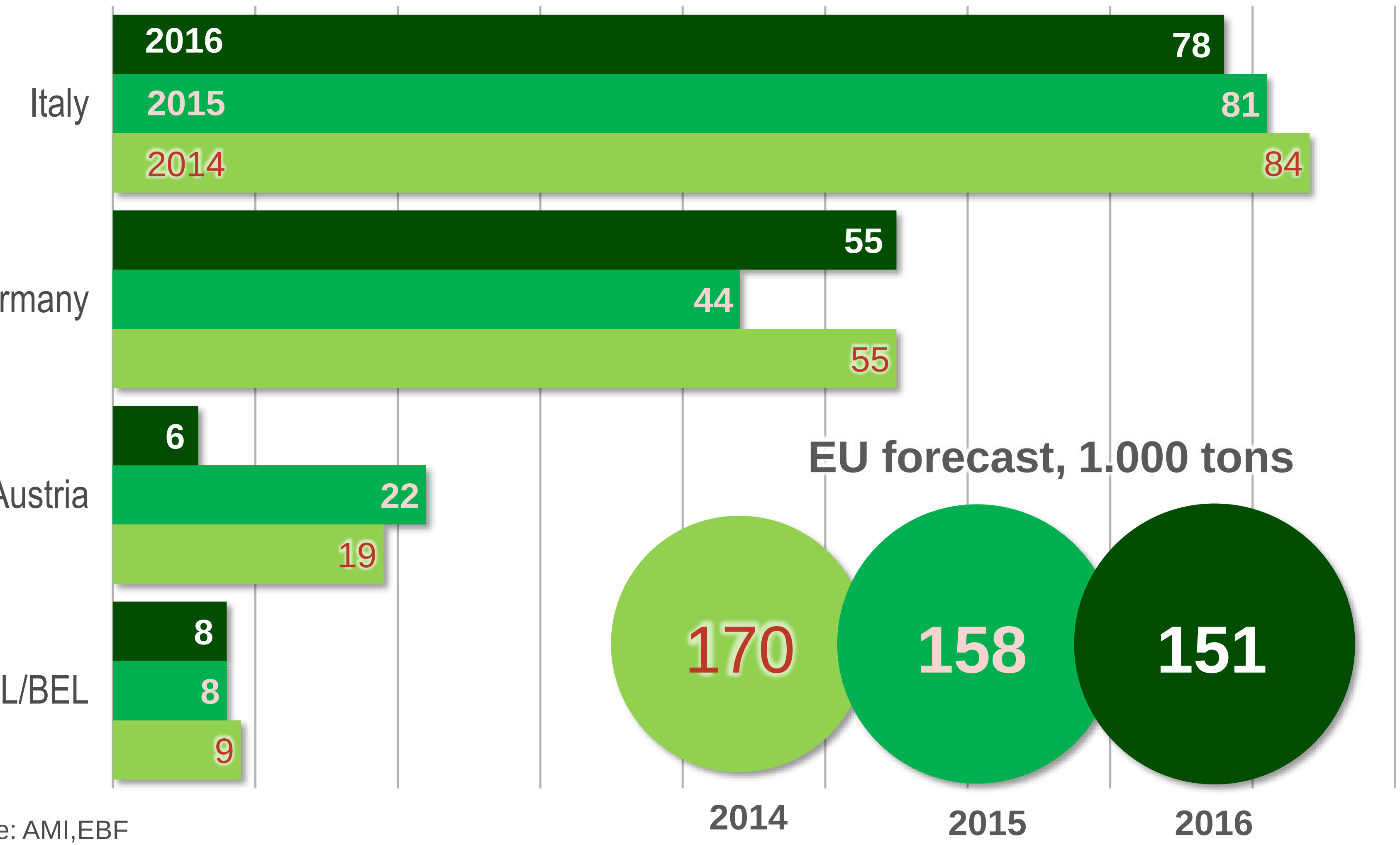


Club varieties and organic apples are the winner of 2015/16

Source: GfK

Organic apple – Only a niche product?

Forecast EU organic apples, 1.000 tons



Source: AMI,EBF

EU – Organic production with top result

AMI

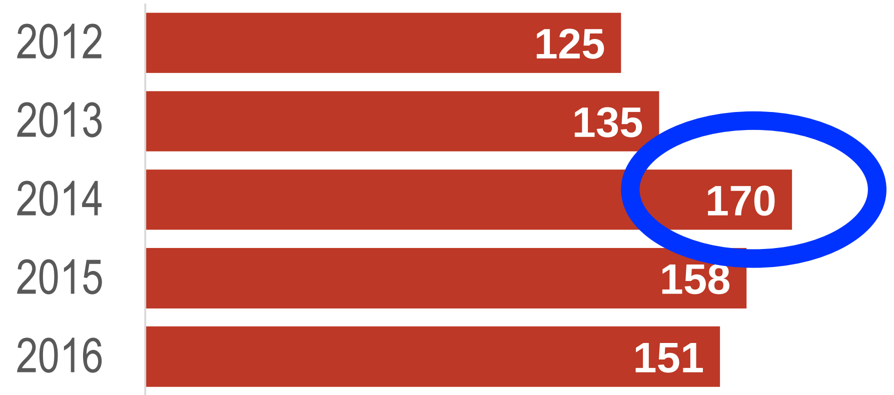
Market for organic apples like an oasis!

- Russian ban without effect
- Increasing Polish apple production without effect
- Retailer with a great rate
- Increasing consumption in Europe
- Attractive price for processing

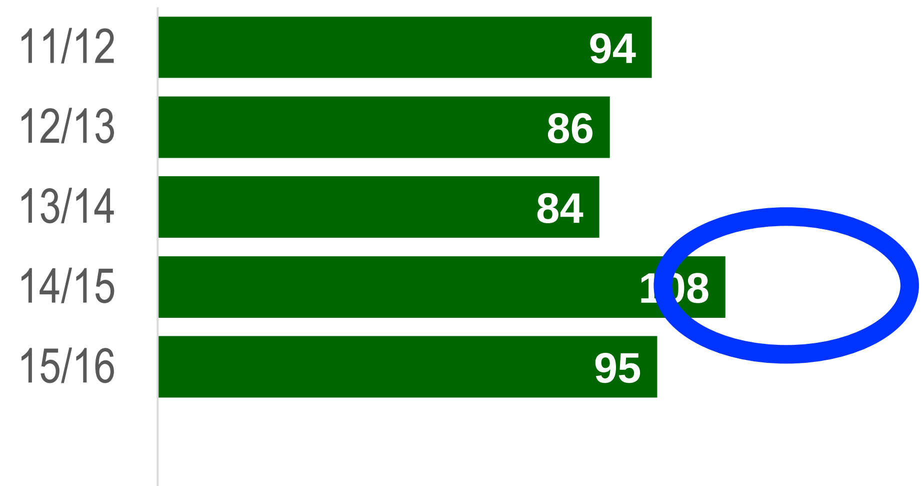
But….

- Carefully increasing production

EU organic apple production (1.000 tons)



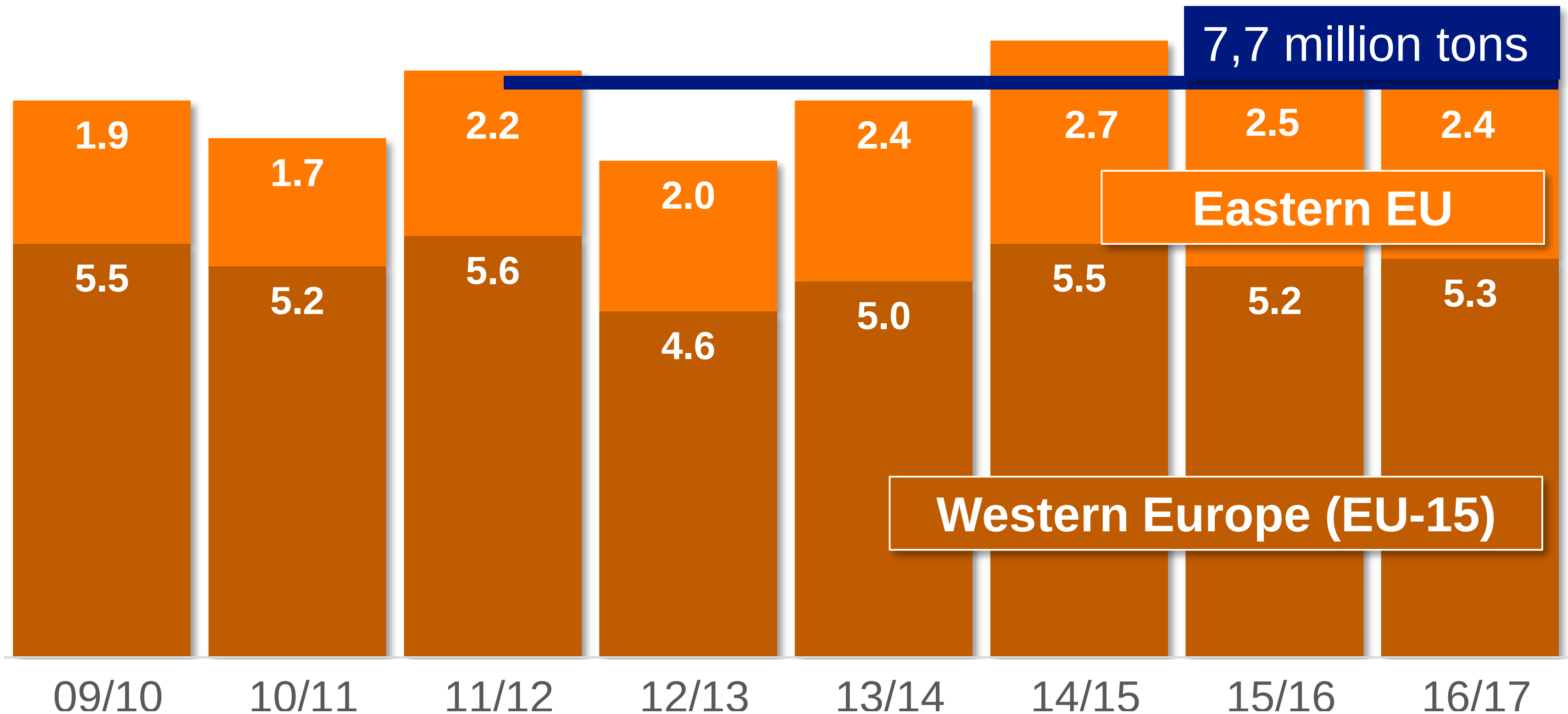
Retail price difference organic to IP apples (%)



Source: AMI, GfK, EBF

Better quality, more apples for freshmarket?

EU 28: Apple harvest for freshmarket, in million tons



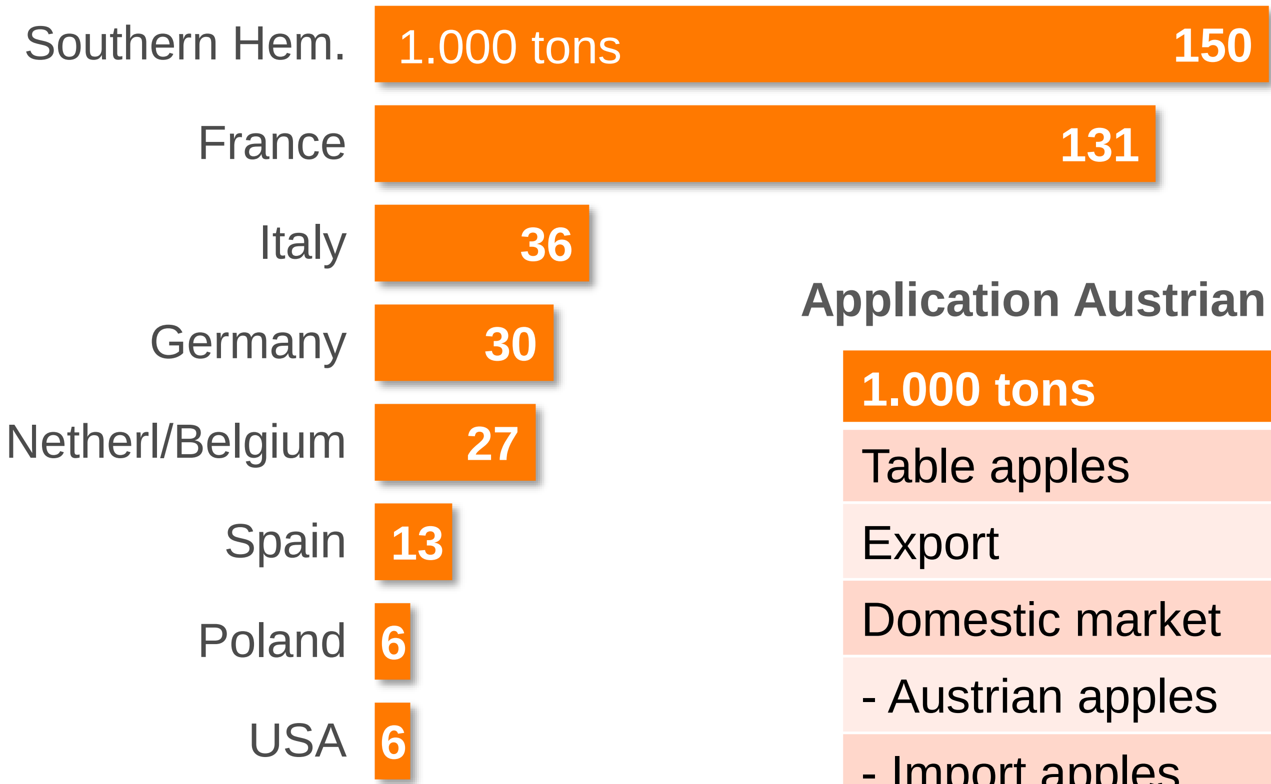
Price autumn, EUR/100kg South Tyrol Gala 70-75mm	60	75	45	63	?

Source: AMI, WAPA

Brexit and Austrian century frost in April

AMI

UK apple imports in 2014/15 (total 400.000 tons)



Application Austrian apples, in 1.000 tons

1.000 tons	2015/16	2014/15
Table apples	20.000	150.000
Export	5.000	70.000
Domestic market		
- Austrian apples	15.000	80.000
- Import apples	50.000	20.000

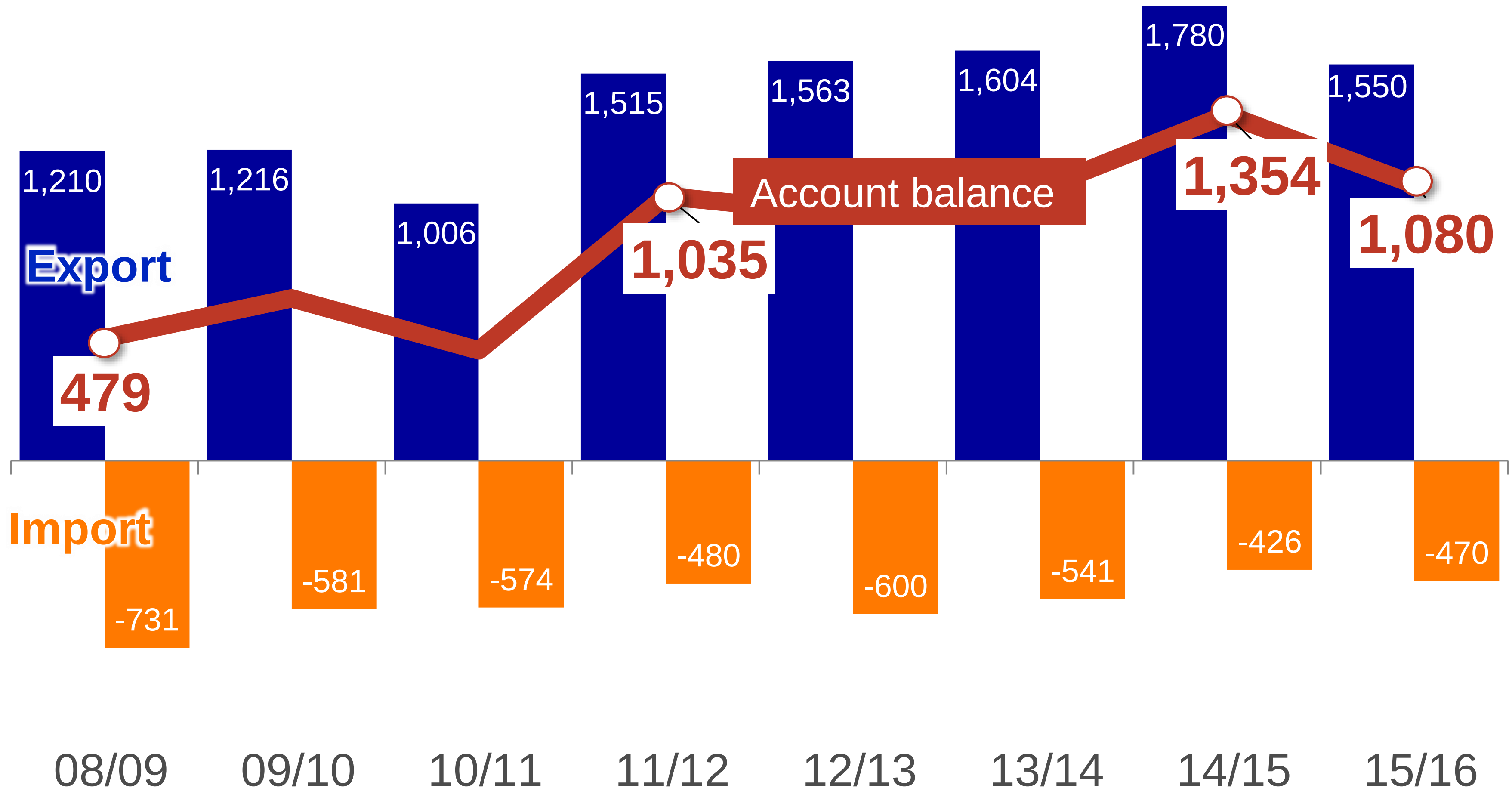
Balkans (incl. Austria) apple imports 170-190.000 t, crop 2016 vs. 2015 = - 400.000 t

Source: Eurostat, WAPA

Less EU apple exports, change of trend?

AMI

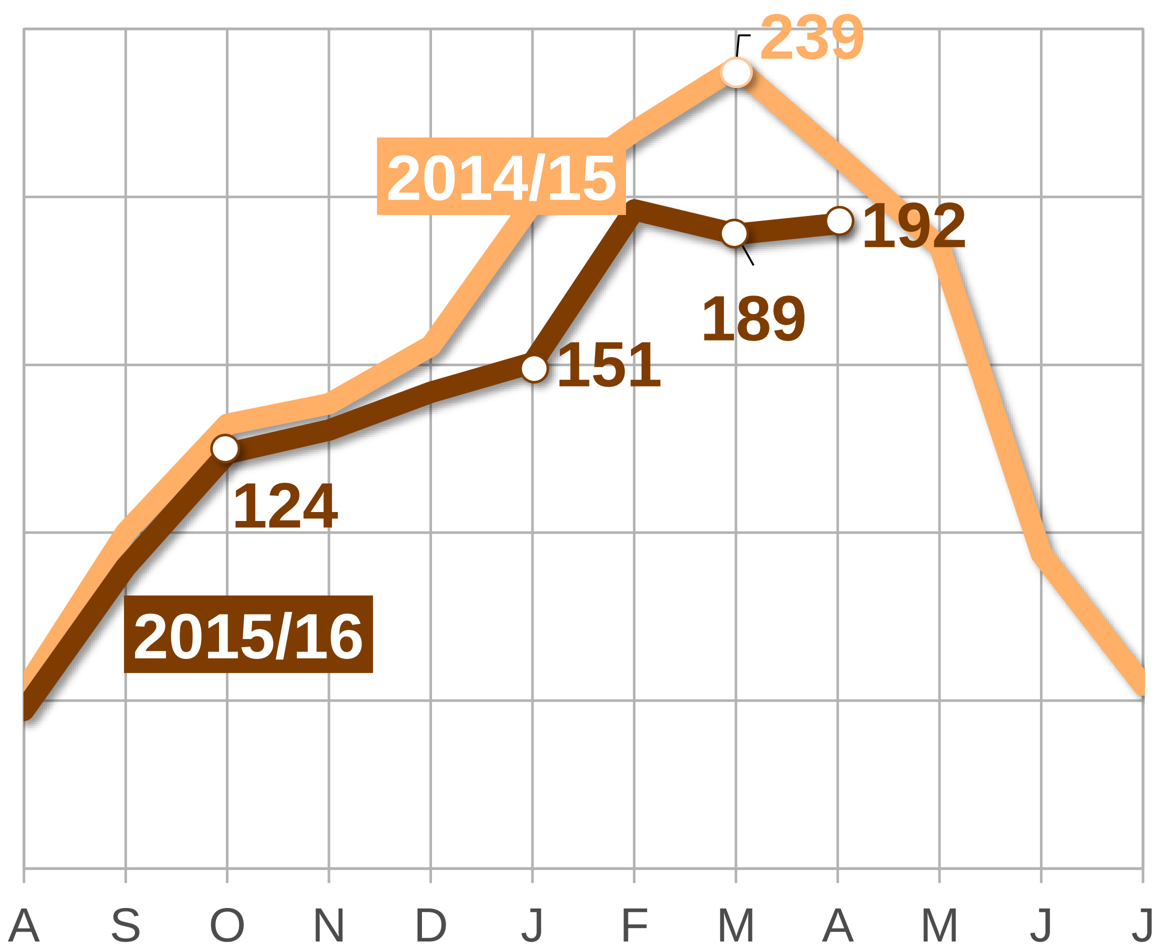
Ø-Current account balance for EU apples (1.000 tons)

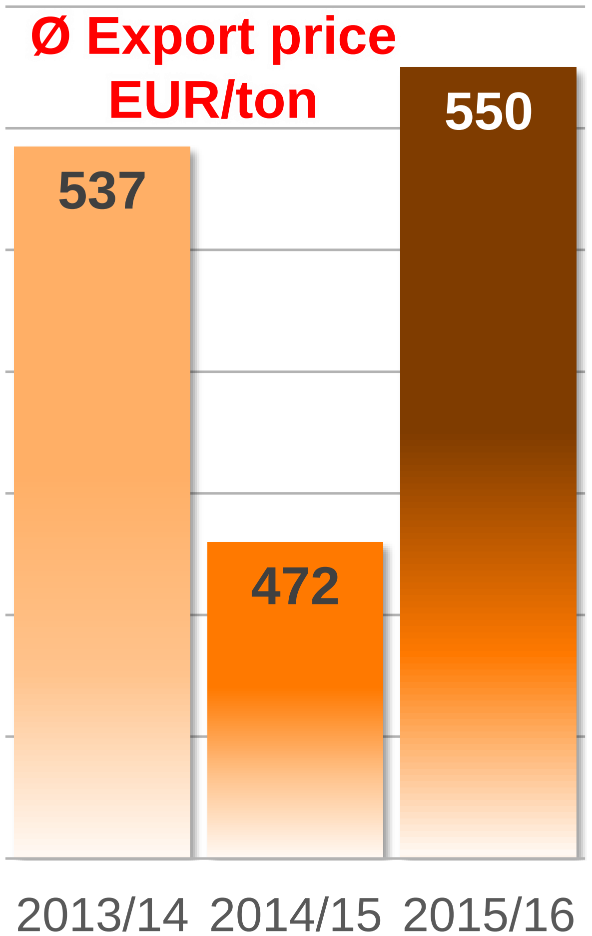


Source: Eurostat

EU - Apple export dropped down

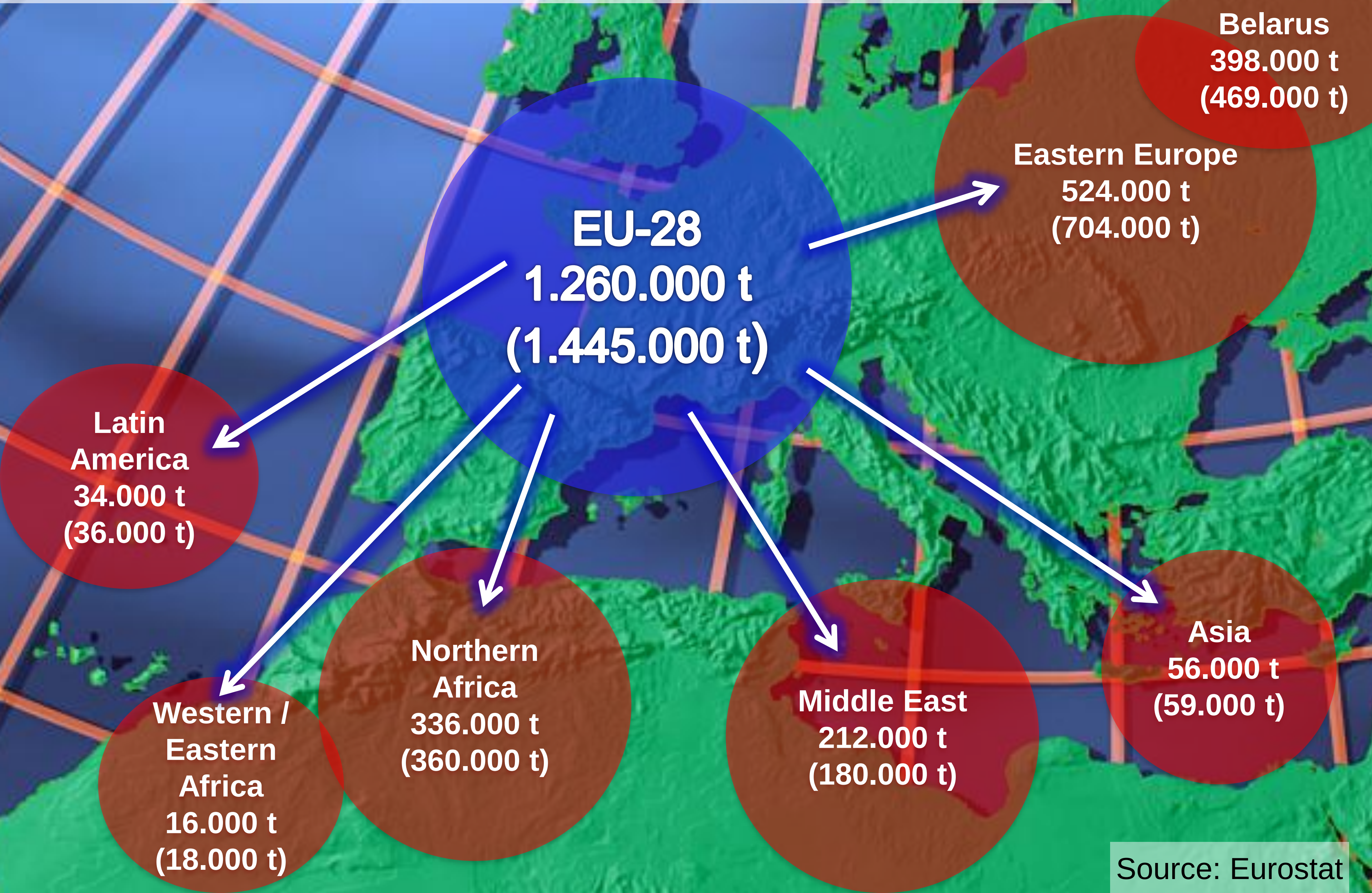
Monthly EU apple export, in 1.000 tons





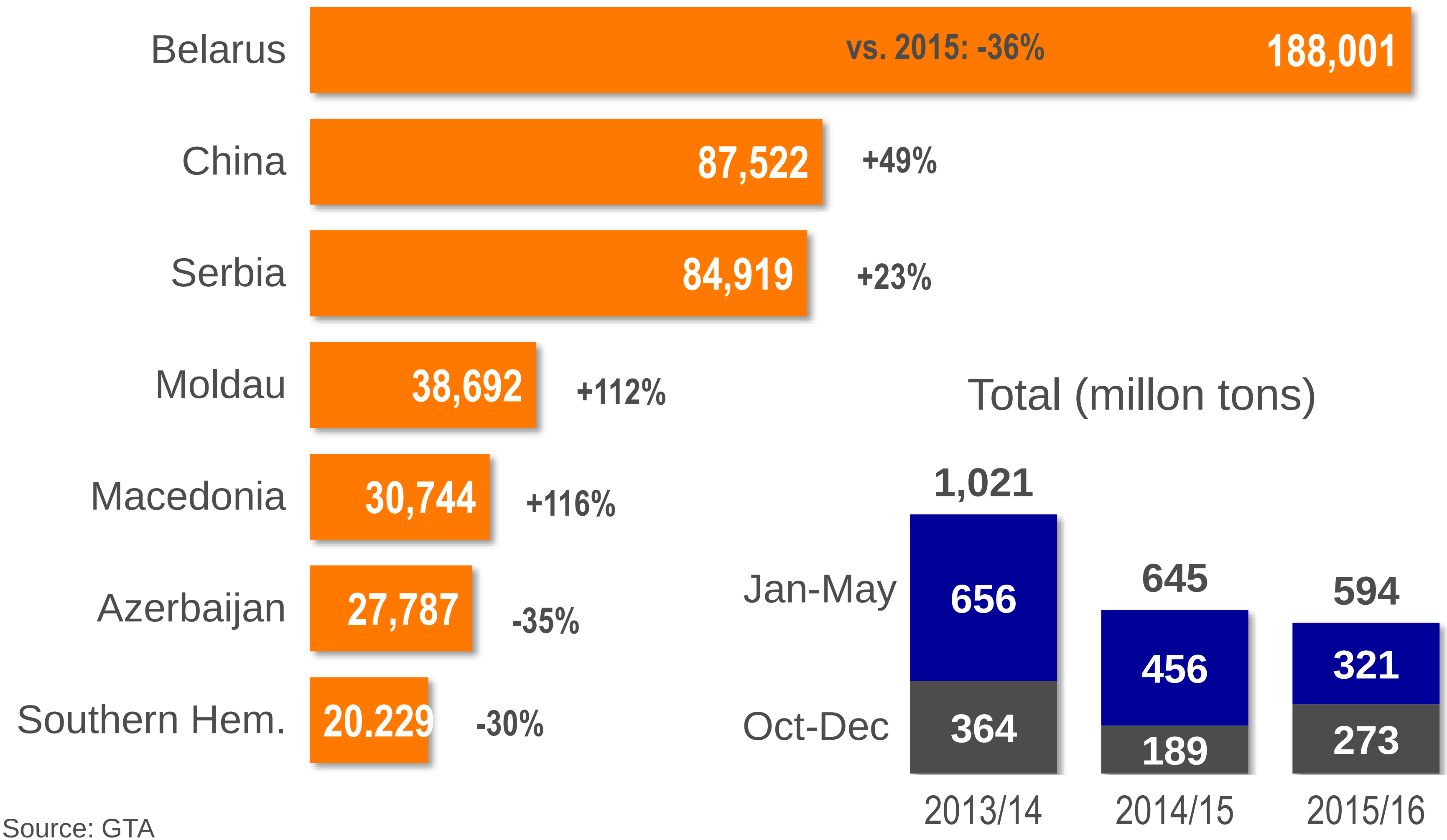
Source: Eurostat

EU 28 - Apple exports in 2015/16 (August – April), comparison to 2014/15



Russia – Import ban and no money

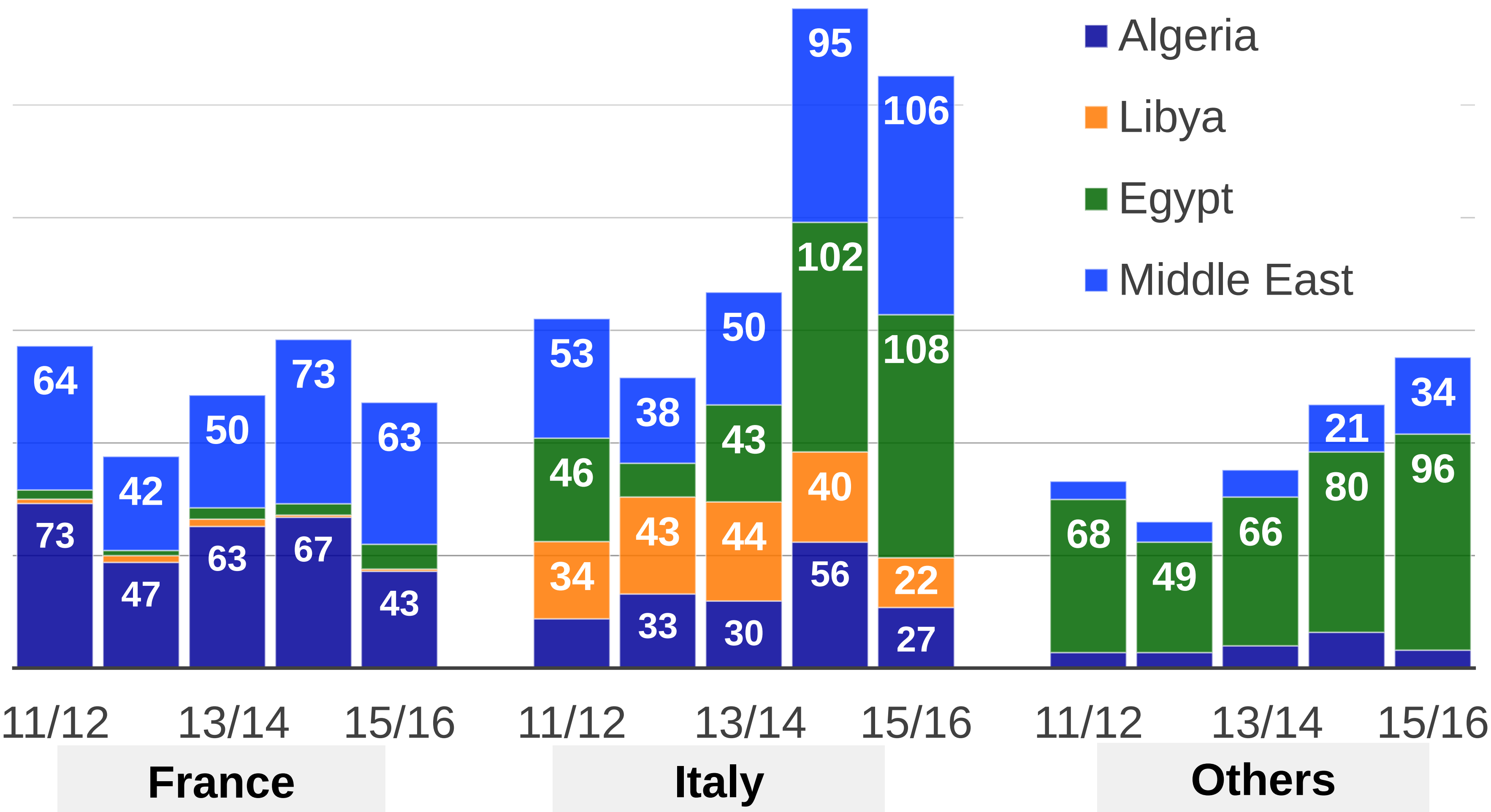
Apple imports August 2015 to April 2016, in 1.000 tons



Source: GTA

Arabic countries imported less apples

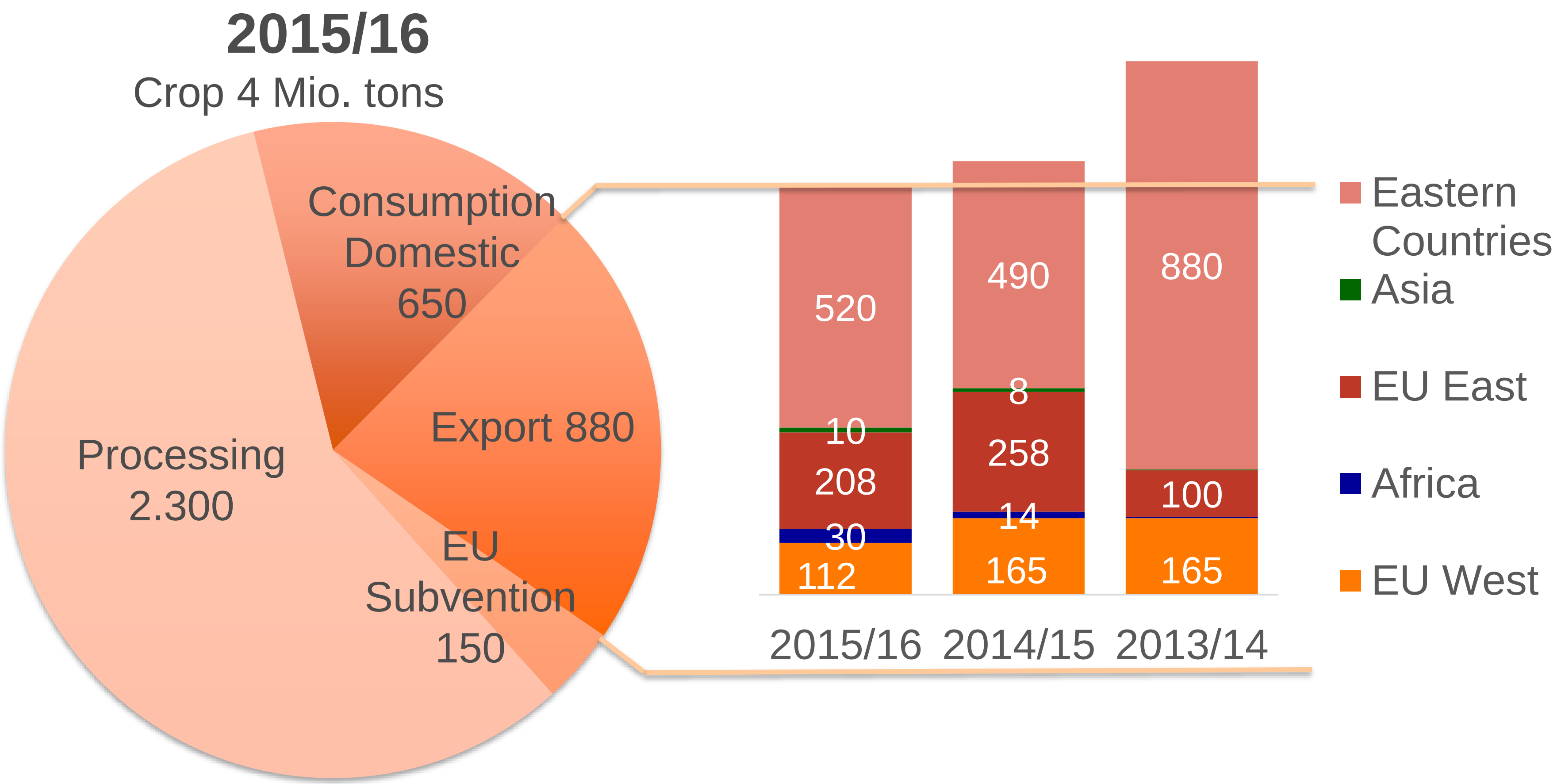
EU apple exports August to April, in 1.000 tons



Source: Eurostat

Poland - Increasing production, what next?

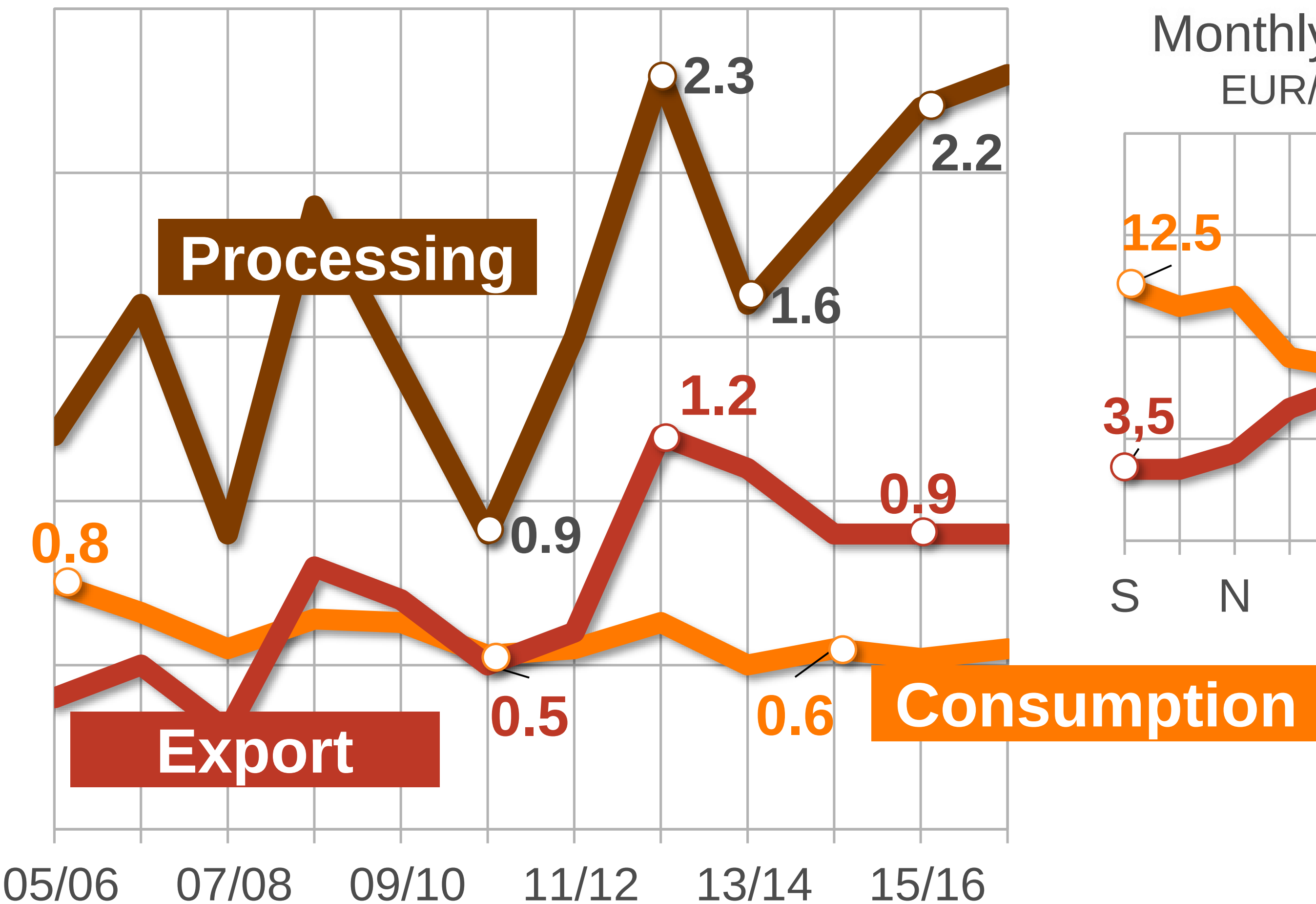
Application apple crop (1.000 tons)



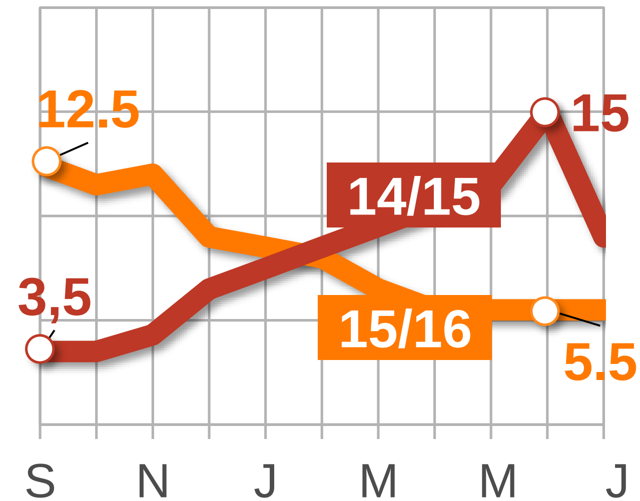
Source: AMI, Eurostat

Poland – What to do with the apples?

Application in 1.000 tons



Monthly price processing,
EUR/100kg,free industry



Source: AMI, KUPS

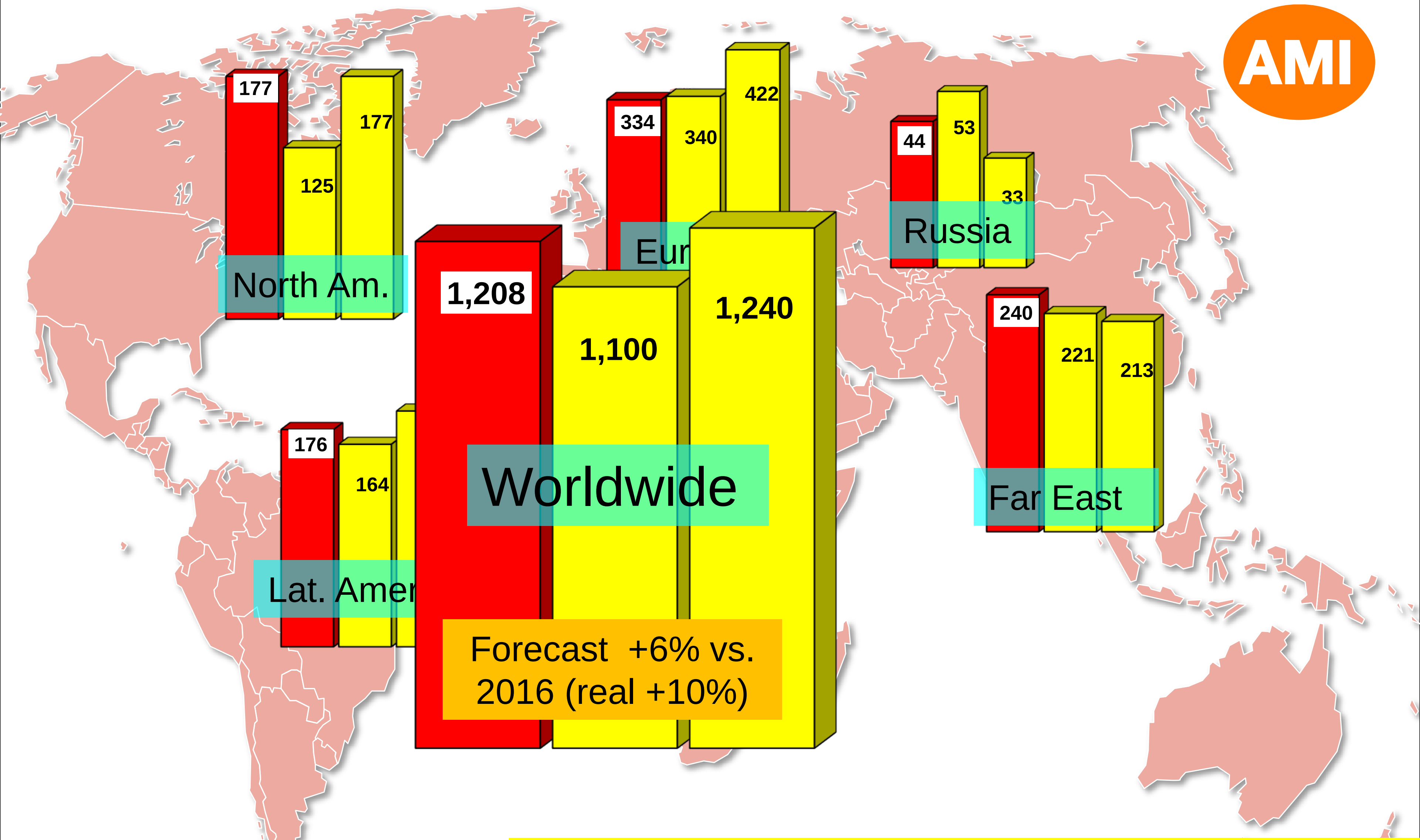
Processing – Pressure in autumn?

Price for AJC (EUR/kg) and apple harvest (1.000 tons) for processing

AMI

Source: AMI

Process. apple (Sep/Oct)	2011	2012	2013	2014	2015	2016f
GER prod.org. Ø EUR/100kg	13	15	16	6	13	5-8
POL free indus. EUR/100kg	11-13	12-13	12-14	3-5	11-13	4-7

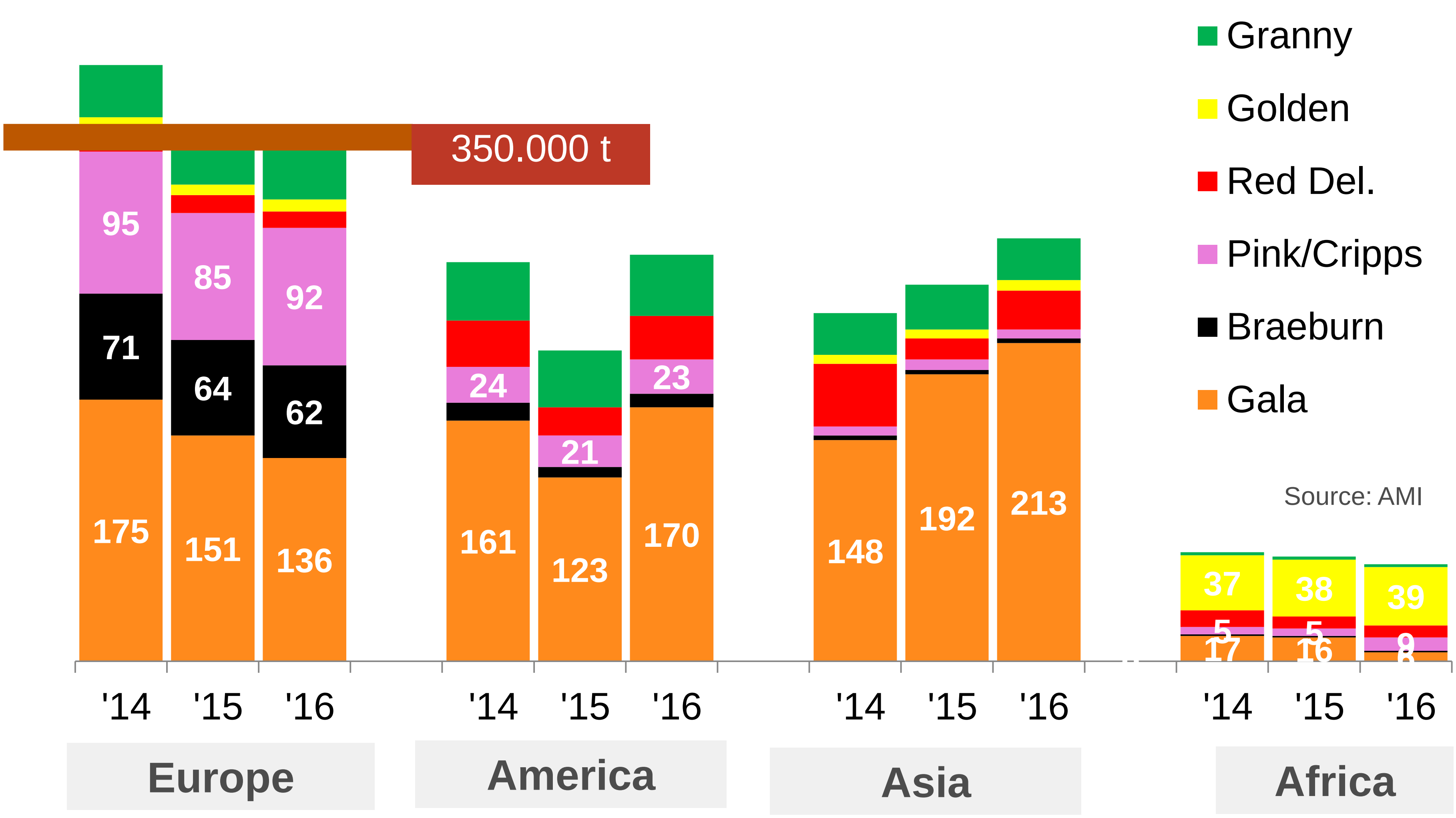


Import markets for apples in the world, trading Southern Hemisphere, till July

(1.000 tons) 2016 (red graphic column), 2015 and 2014

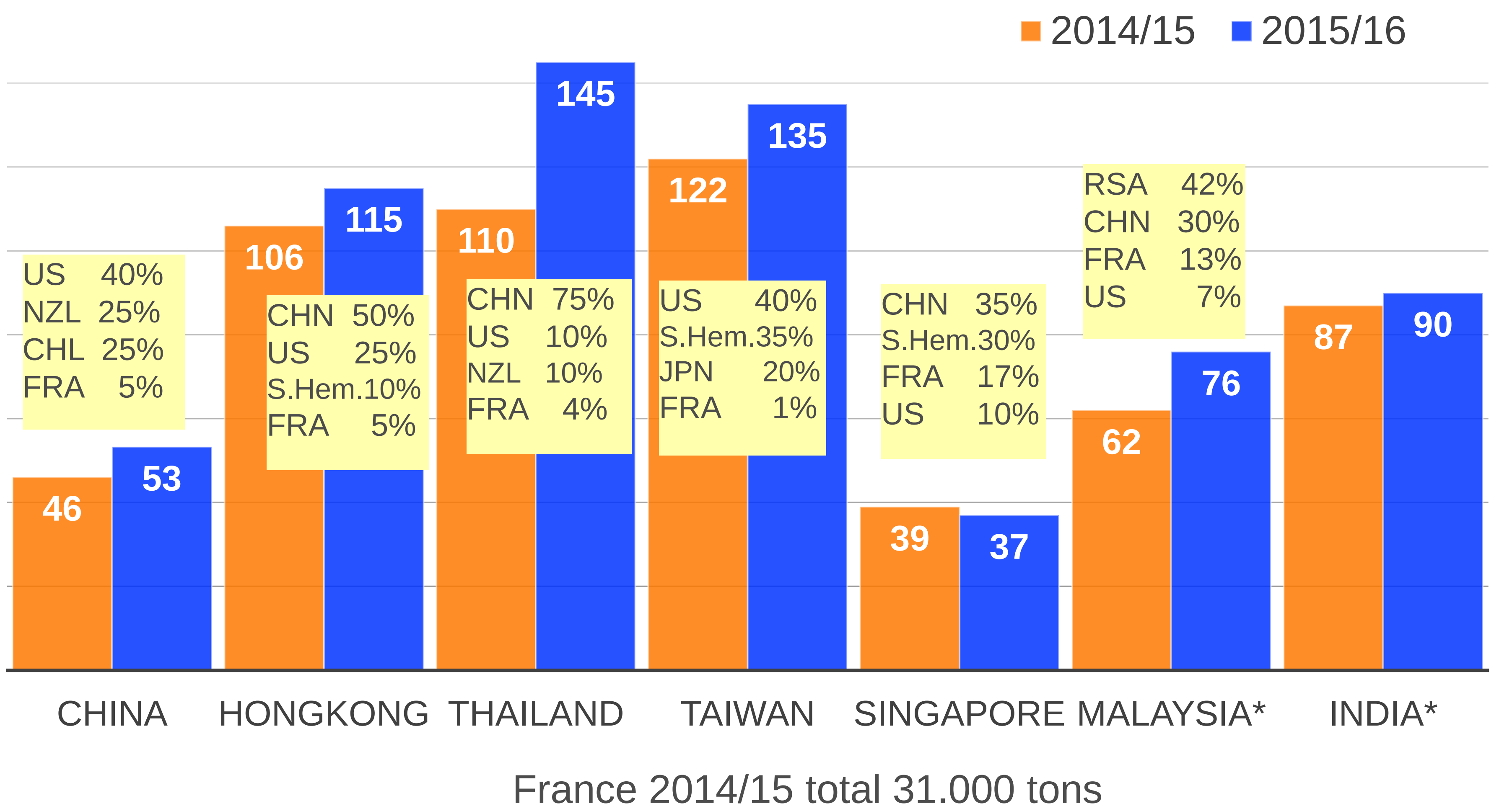
Global apple market – Door opener Gala

Oversea apples – Global exports until the end of July, 1.000 tons



Asia – Important apple import markets

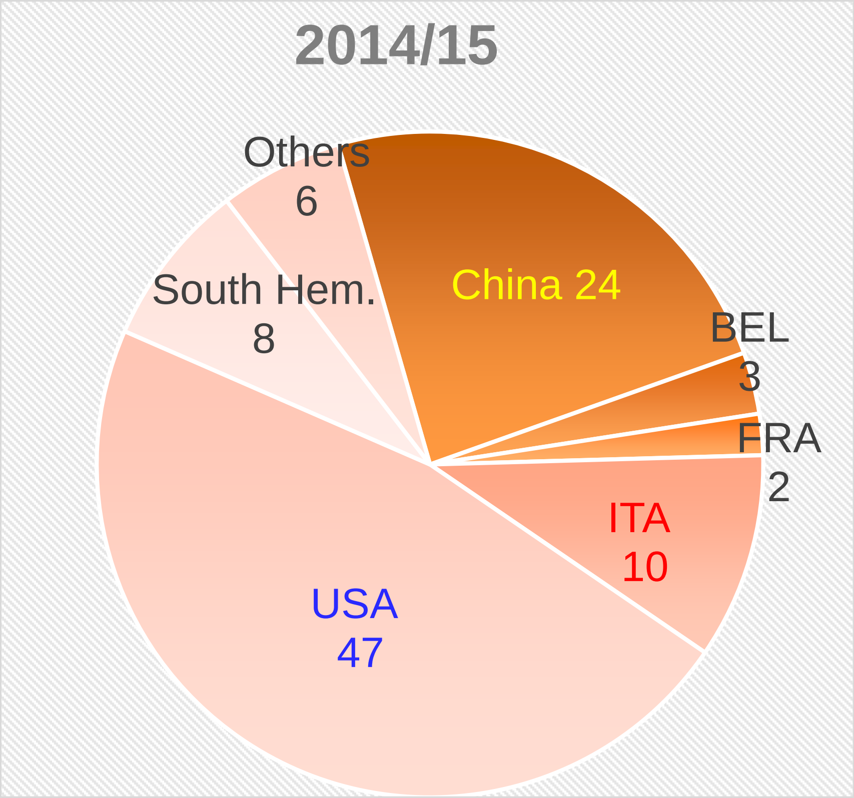
Apple exports August to May (*until April), in 1.000 tons



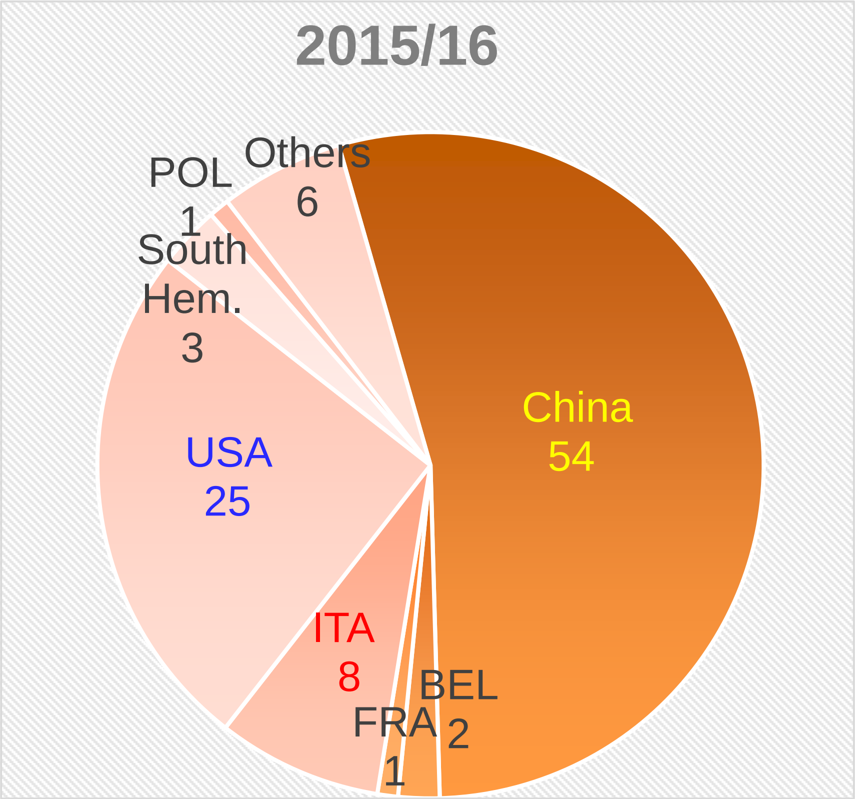
Source: GTA

India – Most important Asia import market

Apple imports September to April, import destination in %



Total 87.000 tons



Total 90.000 tons

Total 2014/15 = 195.000 tons (Italy 11.000 tons, Belgium 6.000 tons)

Source: GTA

Prospect for 2016/17

- EU crop 2016 lower than 2015 and 2014
- Better qualities, stretching the season
- Once again more export in markets outside of Europe? Instable political situation in a lot of countries!
- Broard import markets: Austria/Balkan
- Processing under pressure, but outlook better than 2014
- The base for a successful season is an increasing consumption in the domestic markets

Thanks a lot for your attention.

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