



Daphne van Doorn  
World Apple and Pear Association (WAPA)

# European pear crop outlook 2016

*“a quantitative and qualitative review”*



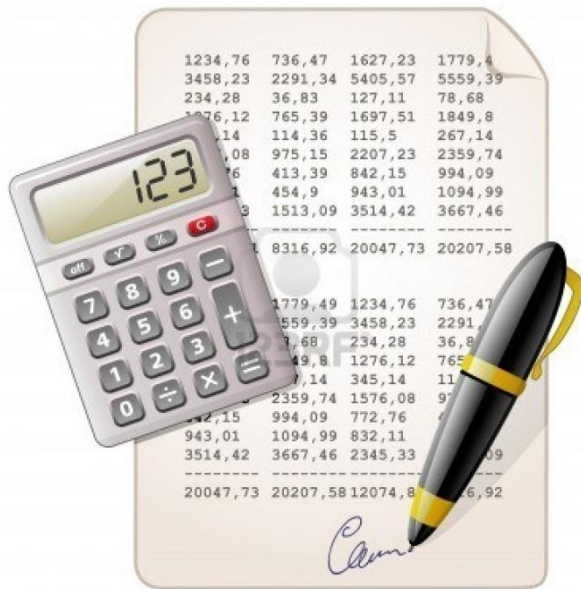
Daphne van Doorn  
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# Presentation structure

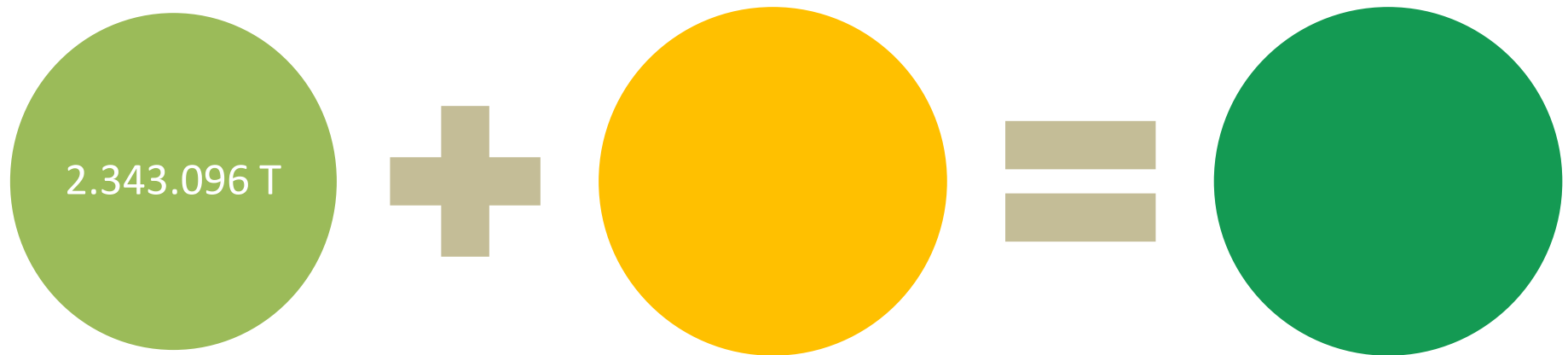
- Validation 2015 data
- NH Pear forecast 2016: quantitative approach
- NH Apple forecast 2016: qualitative approach
- Global overview
- Final comments



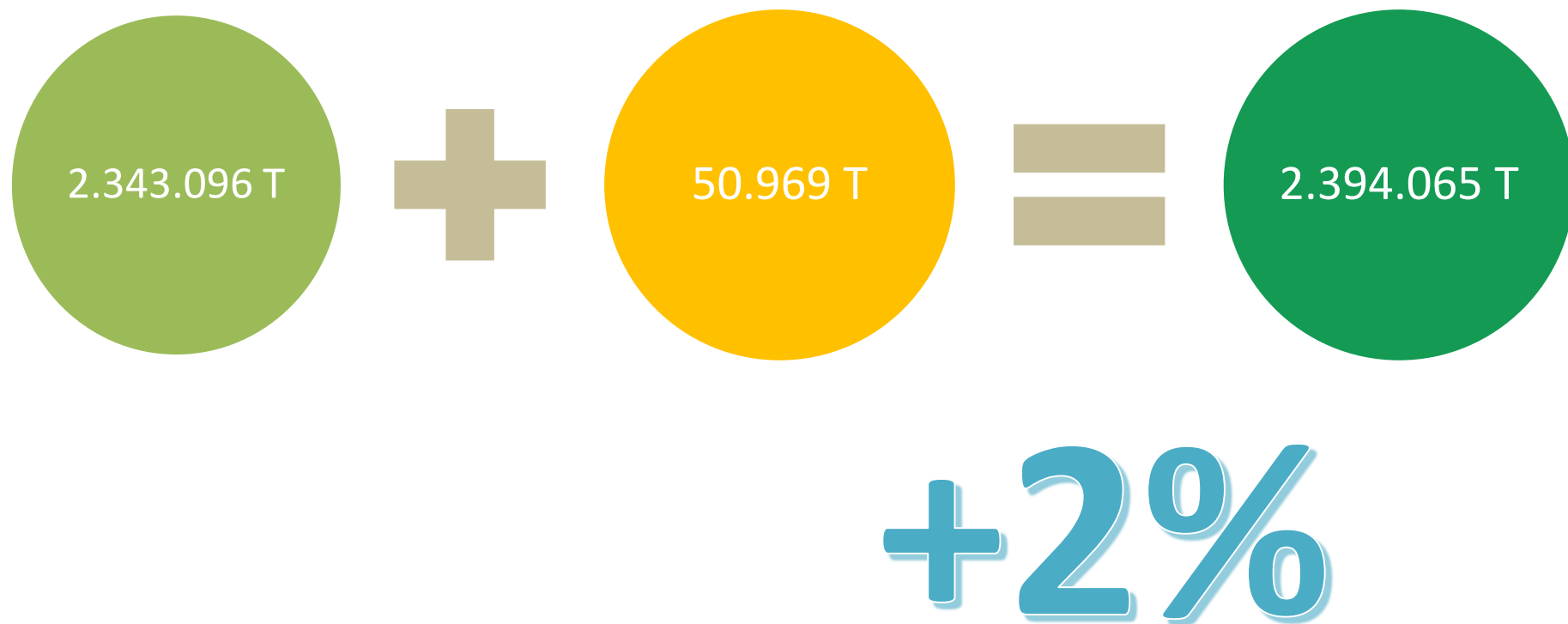
# Validation 2015 data



## Forecast 2015

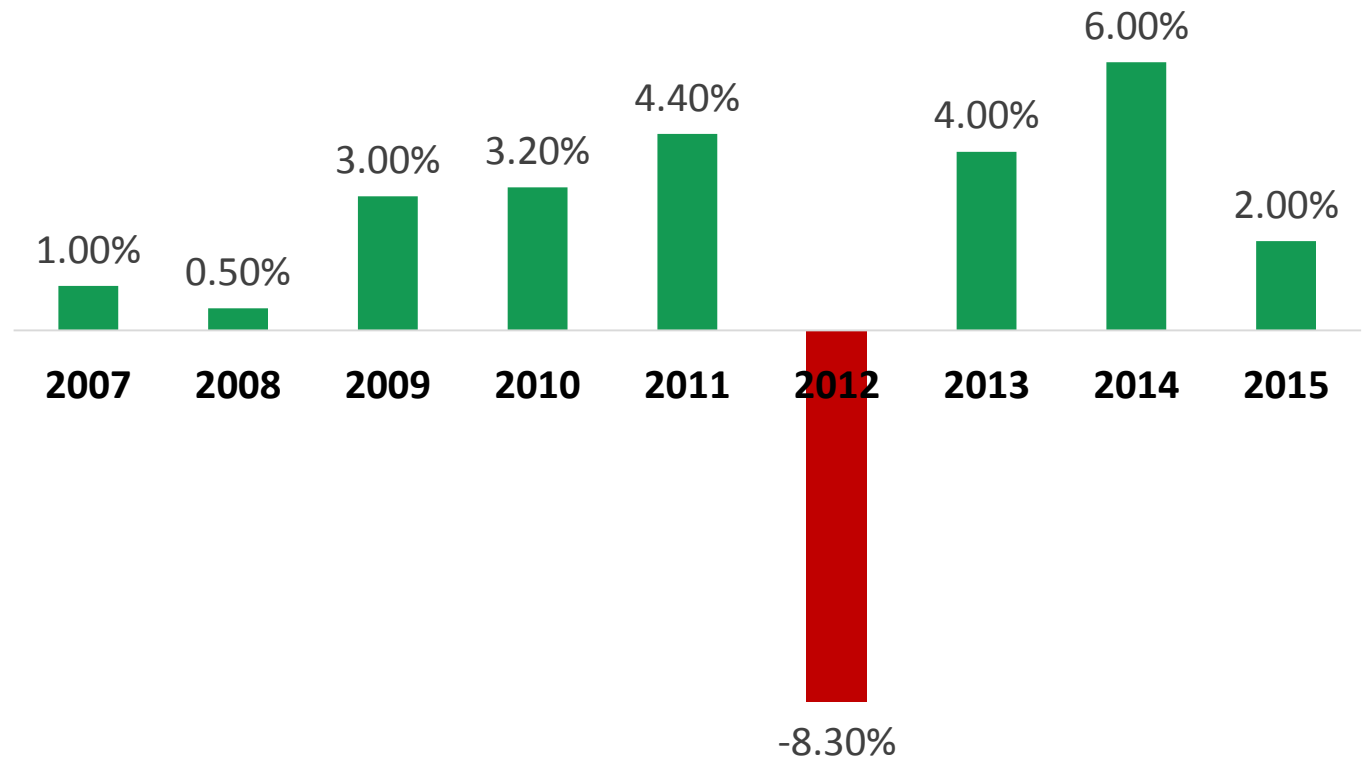


## Forecast and actual results 2015



# Forecast and actual results over time

Evolution 2007-2015



# Forecast and actual results 2015

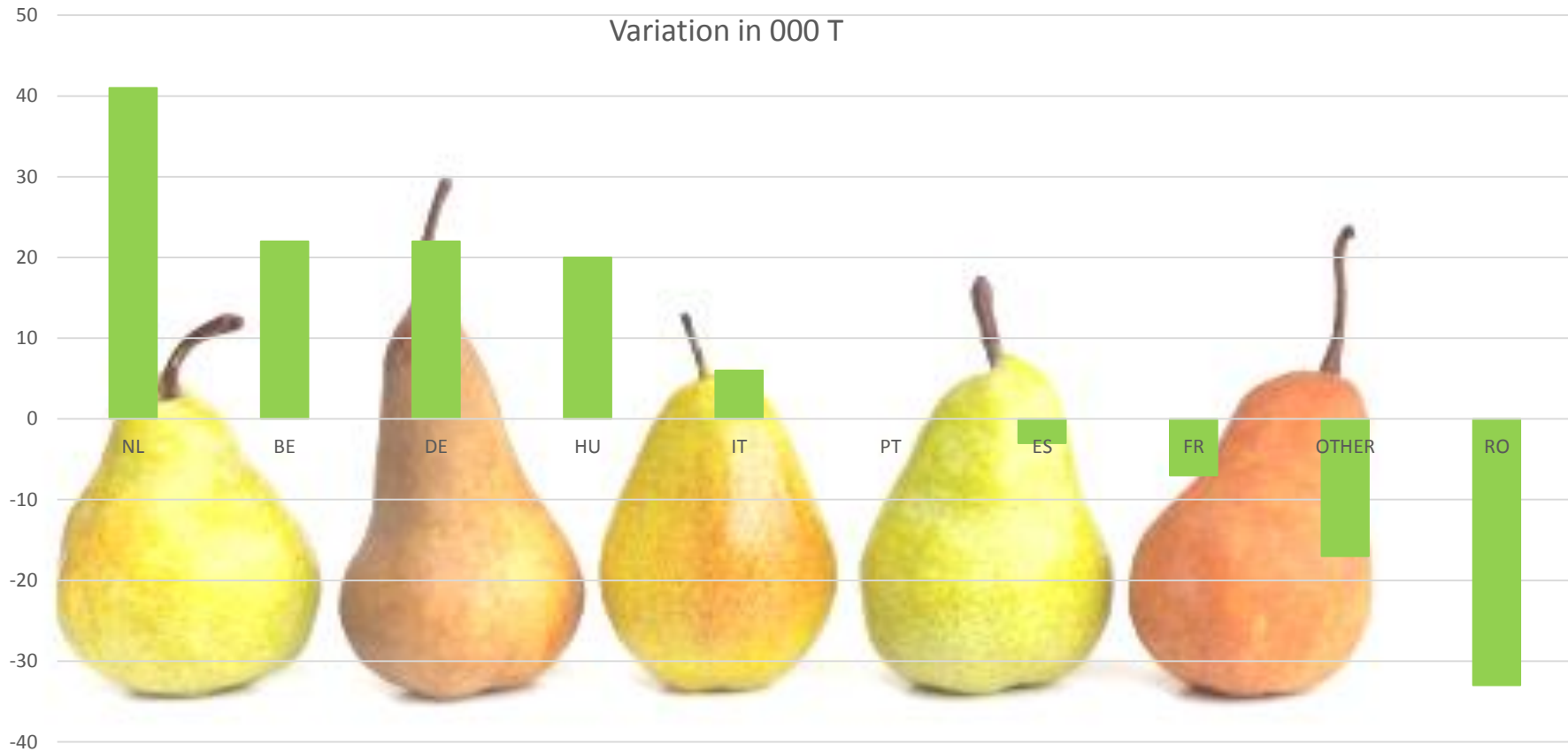
|              |    | Data in '000 T |              | Data in '000 T |           |
|--------------|----|----------------|--------------|----------------|-----------|
| Country      |    | Forecast       | Final        | Var %          | Var in T  |
| Belgium      | BE | 347            | 369          | 6%             | 22        |
| Italy        | IT | 149            | 155          | 4%             | 6         |
| Spain        | ES | 46             | 43           | -7%            | -3        |
| Portugal     | PT | 33             | 33           | 0%             | 0         |
| Netherlands  | NL | 723            | 764          | 6%             | 41        |
| Germany      | DE | 327            | 349          | 7%             | 22        |
| Hungary      | HU | 170            | 190          | 12%            | 20        |
| Other        | EU | 151            | 134          | -11%           | -17       |
| France       | FR | 20             | 13           | -35%           | -7        |
| Romania      | RO | 377            | 344          | -9%            | -33       |
| <b>TOTAL</b> |    | <b>2.343</b>   | <b>2.394</b> | <b>2 %</b>     | <b>51</b> |



**Total 50.969 T difference (2% increase variation)**

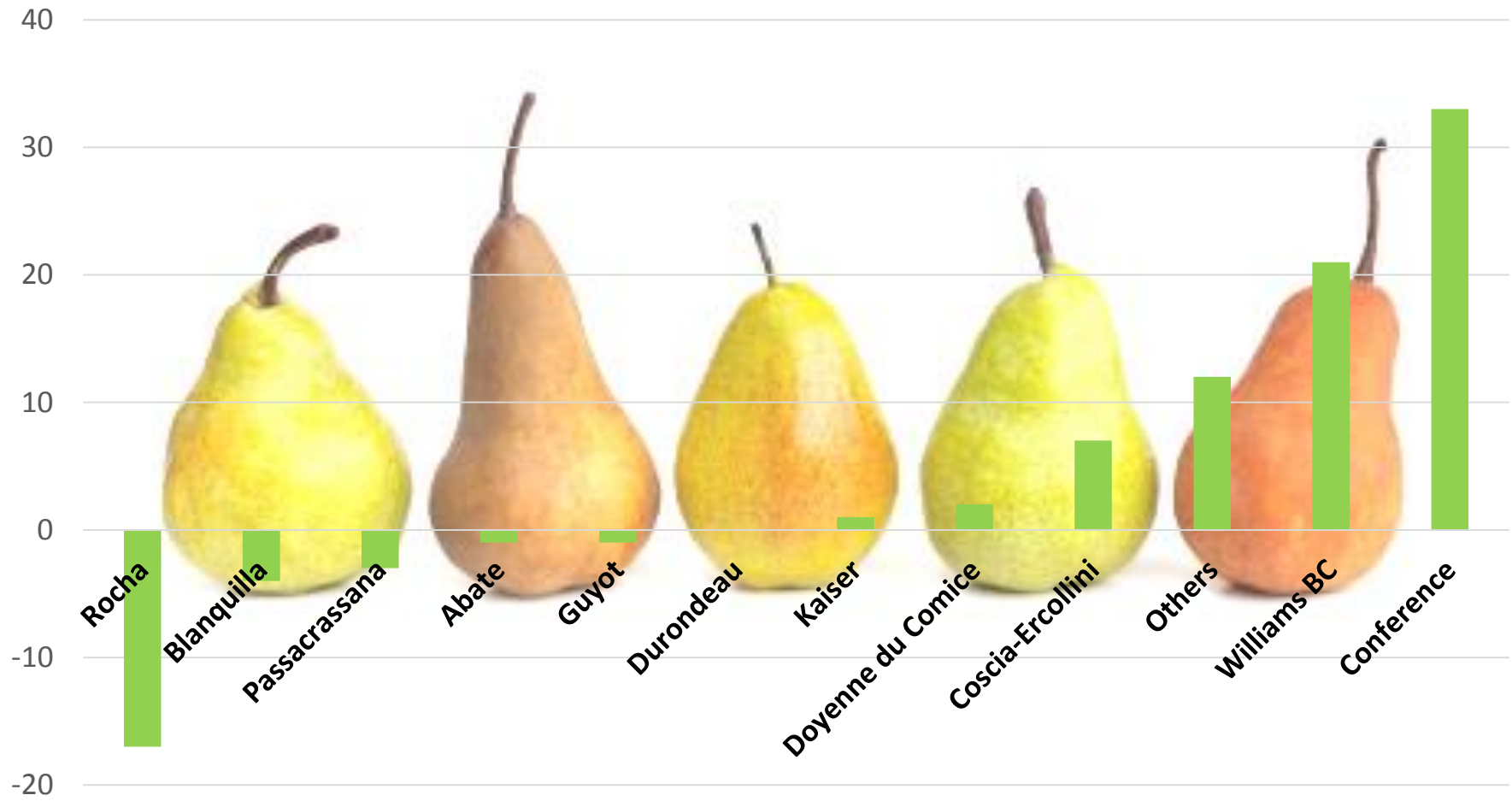


# Forecast and actual results 2015 (per country)

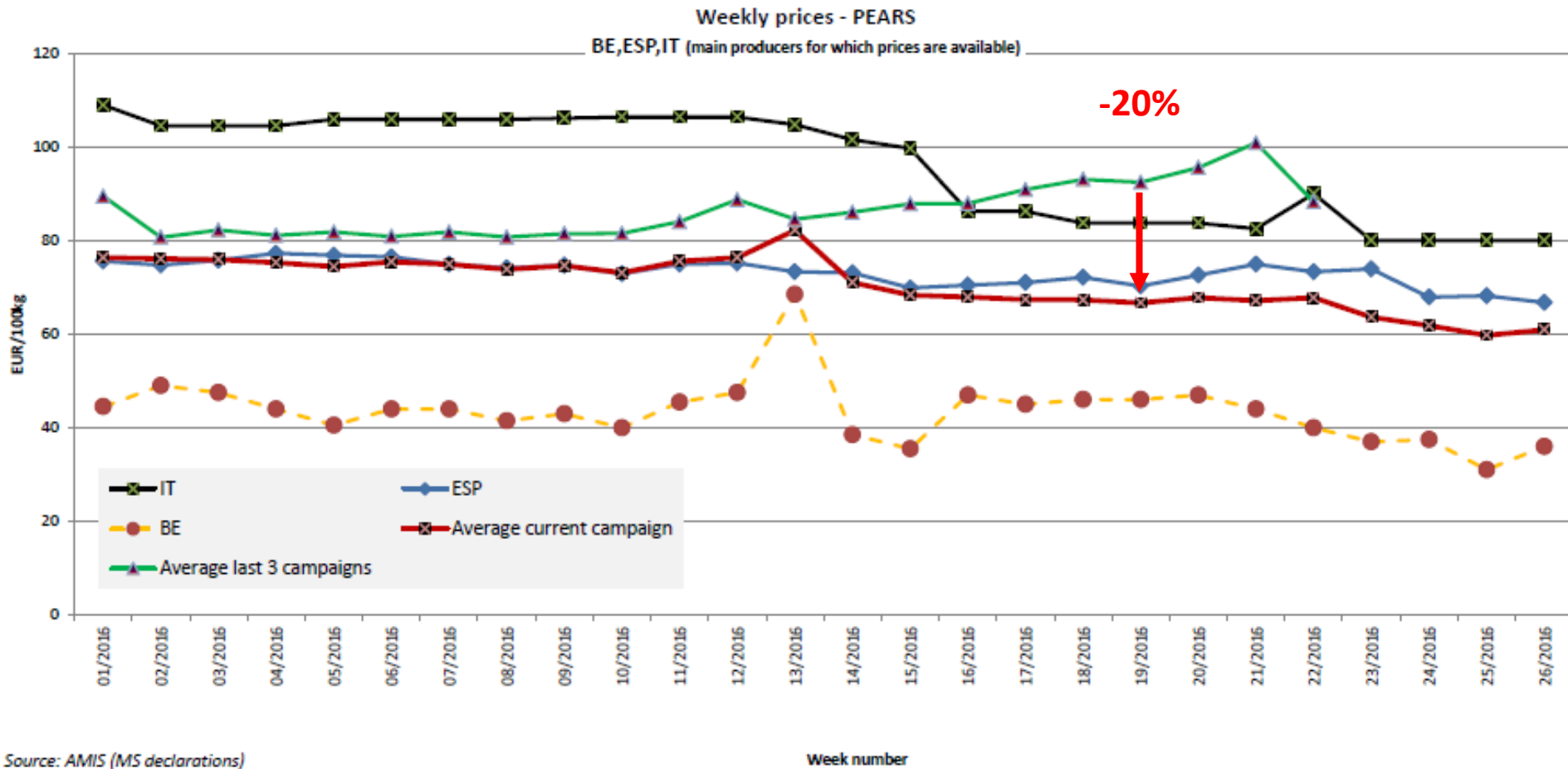


# Forecast and actual results 2015 (per varieties)

Varieties - change in 000T (Forecast vs. Final)

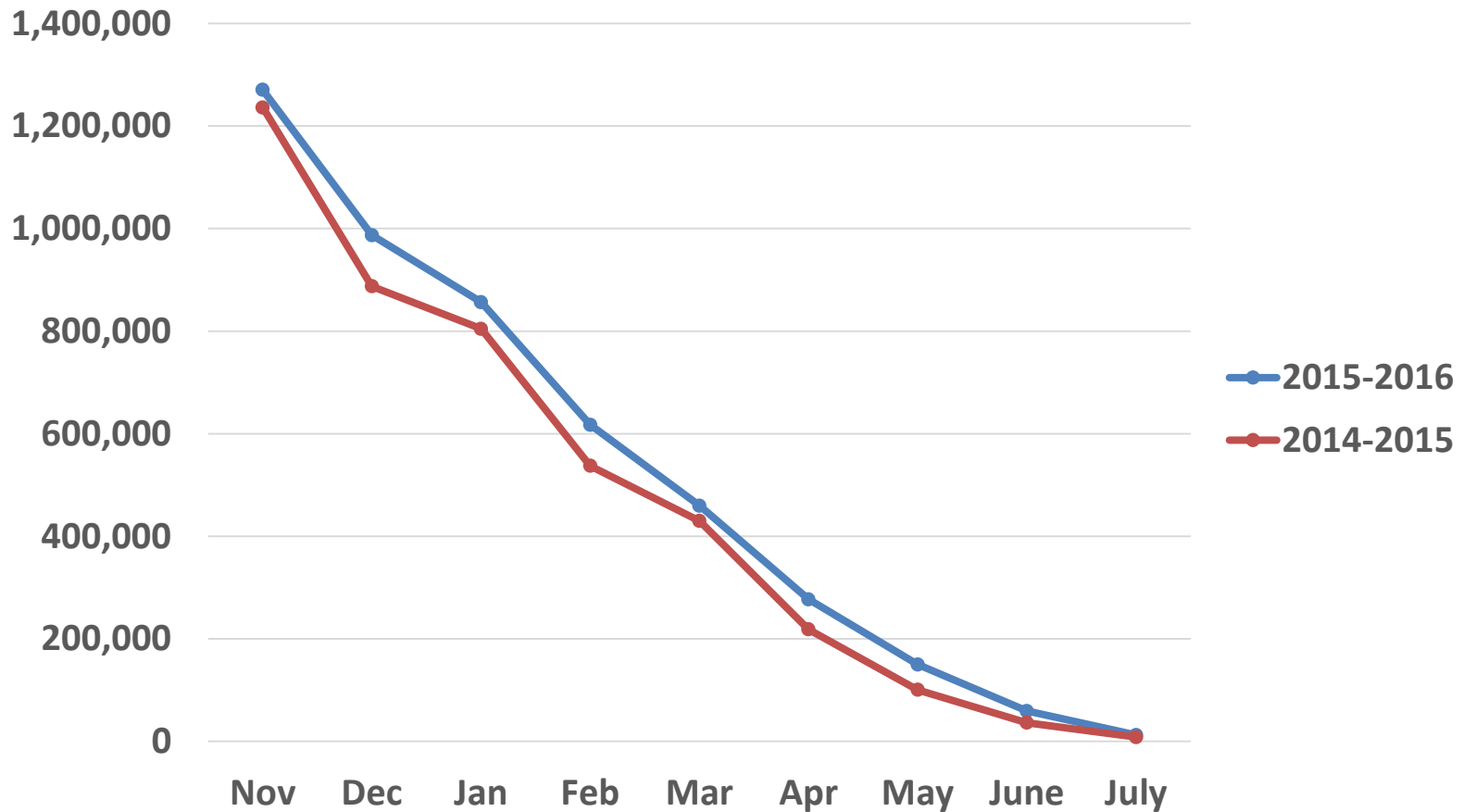


# 2015 season price trends



# 2015 season: stock depletion

## EU Pear Stock Depletion

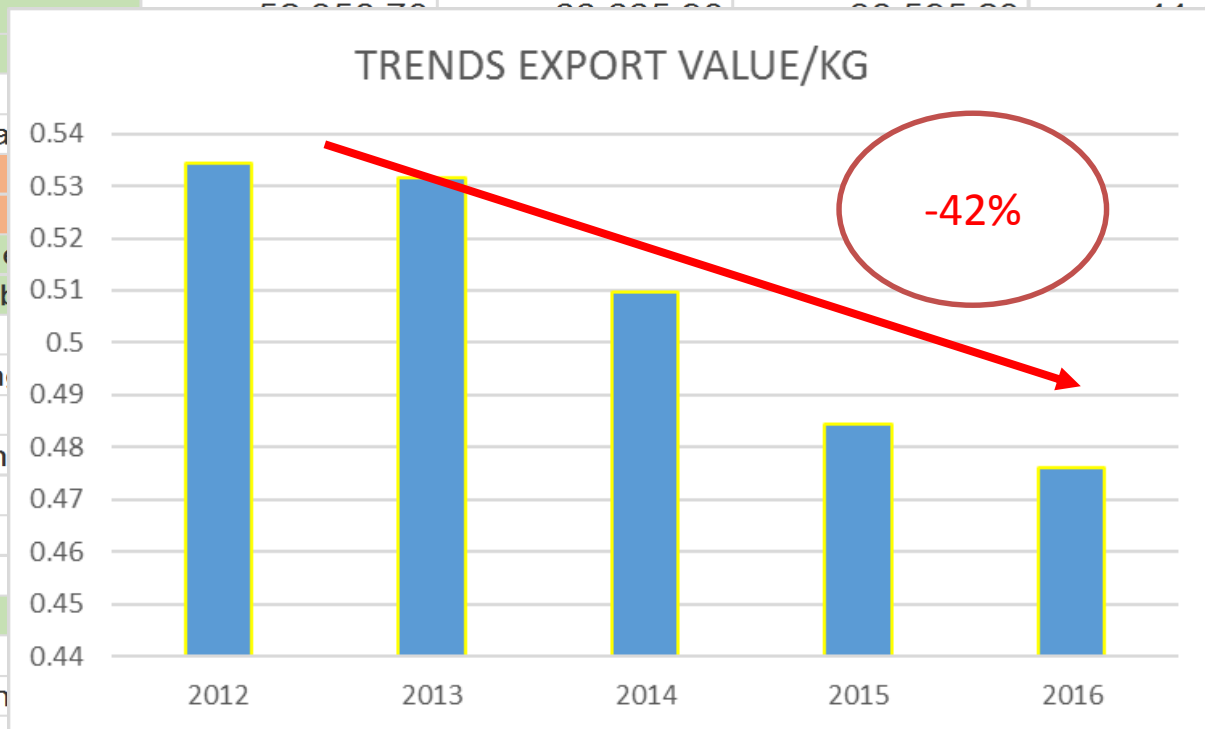


# Pears destinations in T

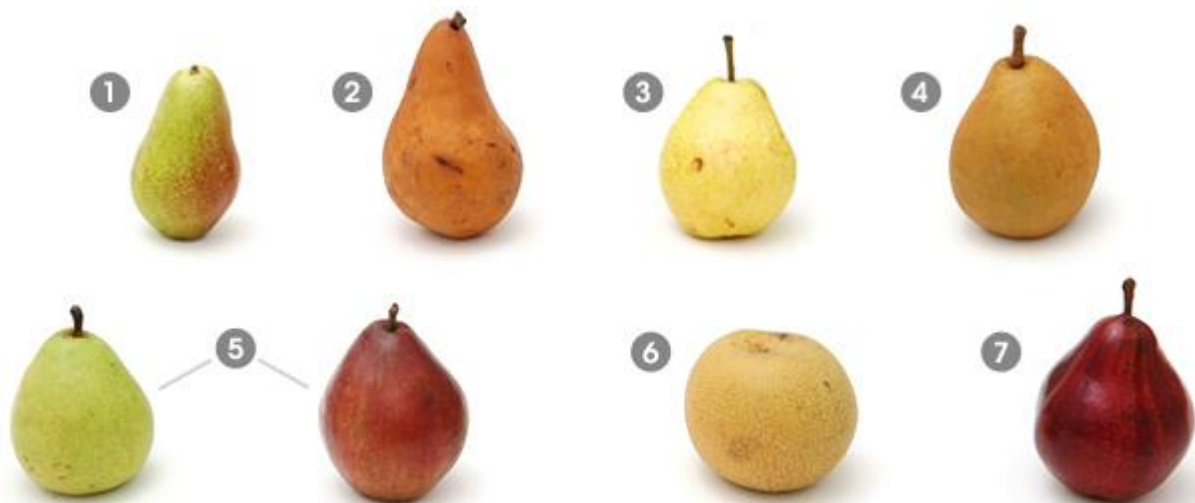
| Partner      | 2015              | 2014              | 2013              | 2012              |
|--------------|-------------------|-------------------|-------------------|-------------------|
| <b>Total</b> | <b>360.787,90</b> | <b>471.732,20</b> | <b>350.360,80</b> | <b>404.298,10</b> |
| Belarus      | 177.108,30        | 116.490,20        | 30.536,60         | 18.402,70         |
| Brazil       | 52.358,70         | 66.665,90         | 38.595,20         | 44.133,30         |
| Morocco      | 18.827,10         | 18.622,30         | 7.064,90          | 8.053,70          |
| Norway       | 17.452,90         | 18.064,80         | 16.040,50         | 18.971,40         |
| Kazakhstan   | 12.447,80         | 11.563,10         | 6.176,40          | 6.020,10          |
| Russia       | 11.358,10         | 154.724,80        | 200.957,60        | 254.396,70        |
| Libya        | 7.748,10          | 13.957,10         | 8.443,10          | 10.540,20         |
| Bosnia Herz  | 7.593,50          | 5.081,80          | 1.246,10          | 2.532,20          |
| Saudi Arabia | 6.049,90          | 2.985,90          | 3.123,00          | 2.751,20          |
| Israel       | 5.024,70          | 5.392,00          | 2.595,40          | 1.412,70          |
| Hong Kong    | 4.878,90          | 4.991,60          | 1.765,30          | 1.889,10          |
| UAE          | 4.472,40          | 4.138,80          | 3.265,70          | 2.204,80          |
| Switzerland  | 4.233,90          | 5.751,40          | 6.322,60          | 3.771,50          |
| Algeria      | 2.829,40          | 7.457,70          | 2.447,60          | 3.150,00          |
| China        | 2.739,80          | 1.857,50          | 526,00            | 360,40            |
| Melilla      | 2.717,70          | 3.425,20          | 2.772,80          | 3.801,90          |
| Jordan       | 2.180,90          | 588,60            | 251,80            | 77,60             |
| Albania      | 2.105,60          | 2.814,70          | 1.789,10          | 2.818,80          |
| Azerbaijan   | 2.055,00          | 4.477,70          | 2.284,70          | 2.906,80          |
| Canada       | 2.053,20          | 1.534,70          | 1.107,90          | 994,40            |
| Ukraine      | 1.455,60          | 4.725,00          | 4.618,00          | 6.330,10          |
| Serbia       | 1.221,20          | 2.077,50          | 658,10            | 1.102,60          |
| Iceland      | 1.050,90          | 1.080,80          | 1.003,30          | 1.135,20          |
| Ceuta        | 1.036,10          | 579,80            | 365,00            | 64,00             |
| Georgia      | 1.016,10          | 1.236,00          | 1.139,50          | 757,30            |

# Pears destinations in T

| Partner            | 2015              | 2014              | 2013              | 2012              |
|--------------------|-------------------|-------------------|-------------------|-------------------|
| <b>Total</b>       | <b>360.787,90</b> | <b>471.732,20</b> | <b>350.360,80</b> | <b>404.298,10</b> |
| Belarus            | 177.108,30        | 116.490,20        | 30.536,60         | 18.402,70         |
| Brazil             | 58.858,70         | 88.885,80         | 88.585,80         | 11.133,30         |
| Morocco            |                   |                   |                   | 53,70             |
| Norway             |                   |                   |                   | 71,40             |
| Kazakhstan         |                   |                   |                   | 20,10             |
| Russia             |                   |                   |                   | 96,70             |
| Libya              |                   |                   |                   | 40,20             |
| Bosnia Herzegovina |                   |                   |                   | 32,20             |
| Saudi Arabia       |                   |                   |                   | 51,20             |
| Israel             |                   |                   |                   | 12,70             |
| Hong Kong          |                   |                   |                   | 89,10             |
| UAE                |                   |                   |                   | 04,80             |
| Switzerland        |                   |                   |                   | 71,50             |
| Algeria            |                   |                   |                   | 50,00             |
| China              |                   |                   |                   | 60,40             |
| Melilla            |                   |                   |                   | 01,90             |
| Jordan             |                   |                   |                   | 77,60             |
| Albania            |                   |                   |                   | 18,80             |
| Azerbaijan         |                   |                   |                   | 06,80             |
| Canada             | 2.055,20          | 1.554,70          | 1.107,90          | 994,40            |
| Ukraine            | 1.455,60          | 4.725,00          | 4.618,00          | 6.330,10          |
| Serbia             | 1.221,20          | 2.077,50          | 658,10            | 1.102,60          |
| Iceland            | 1.050,90          | 1.080,80          | 1.003,30          | 1.135,20          |
| Ceuta              | 1.036,10          | 579,80            | 365,00            | 64,00             |
| Georgia            | 1.016,10          | 1.236,00          | 1.139,50          | 757,30            |

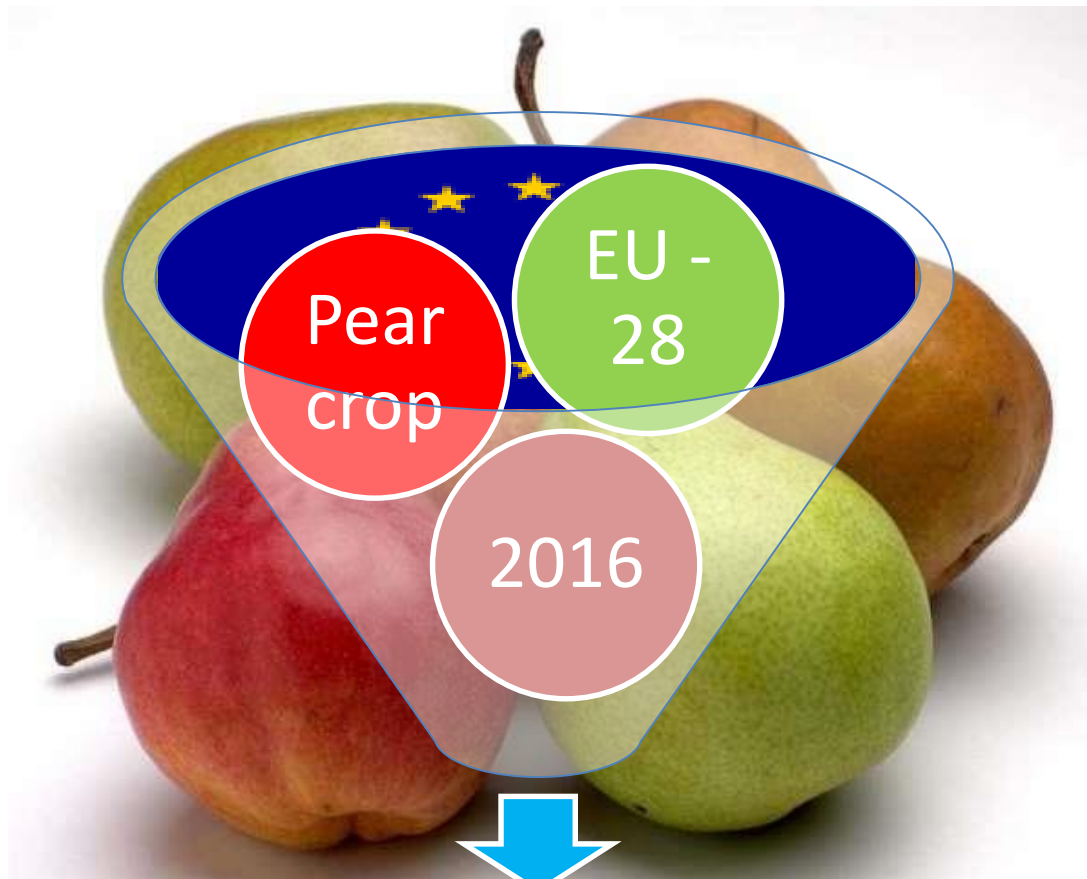


# Pears forecast 2016 quantitative approach EU 28 – by Member States





# Forecast 2016



2.169.942 T



# Forecast 2015

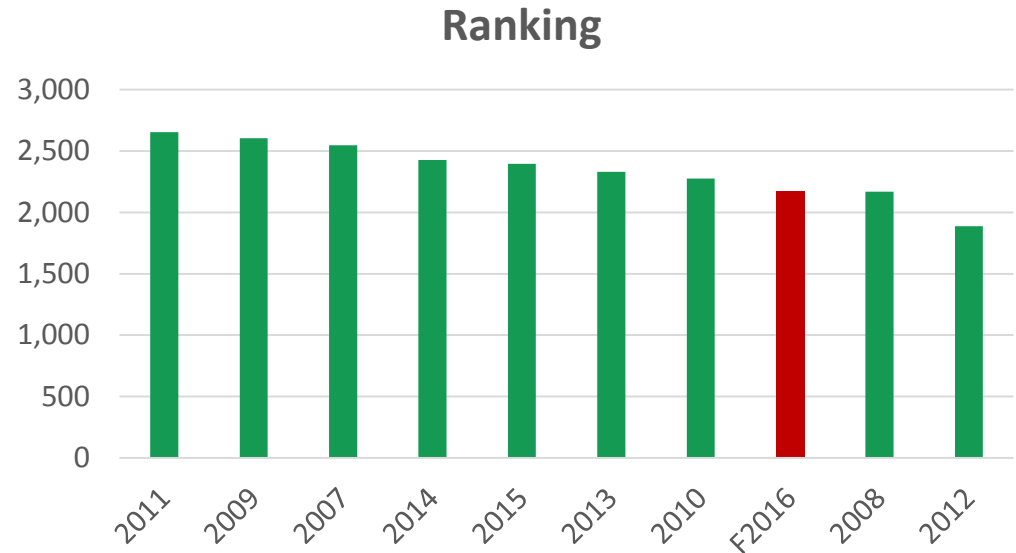


2.169.942 T

# EU-28 crop in perspective

|       |       |
|-------|-------|
| AV10Y | 2.345 |
| 2015  | 2.394 |
| 2016  | 2.170 |
| AV5Y  | 2.241 |
| AV3Y  | 2.330 |

| Ranking | Year  | '000 T |
|---------|-------|--------|
| 1       | 2011  | 2.652  |
| 2       | 2009  | 2.603  |
| 3       | 2007  | 2.545  |
| 4       | 2014  | 2.425  |
| 5       | 2015  | 2.394  |
| 6       | 2013  | 2.330  |
| 7       | 2010  | 2.276  |
| 8       | F2016 | 2.170  |
| 9       | 2008  | 2.168  |
| 10      | 2012  | 1.888  |

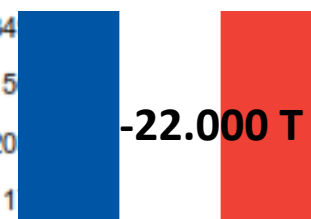


## 2016 crop forecast:

- 9% less than last year
- 7,5 % less than 10 Y average
- 7% less than 3 Y average
- 3% less than 5 Y average

# EU crop: 9% less than last year

| Country       | 2007         | 2008         | 2009         | 2010         | 2011         | 2012         | 2013         | 2014         | 2015         | F2016        | (1)       | (2)       |
|---------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|-----------|-----------|
| Belgium       | 287          | 170          | 307          | 285          | 295          | 236          | 315          | 374          | 369          | 332          | -10       | -6        |
| Croatia       | 10           | 7            | 5            | 6            | 6            | 2            | 3            | 2            | 2            | 1            | -41       | -57       |
| Czech Rep     | 3            | 3            | 6            | 3            | 3            | 6            | 7            | 4            | 10           | 6            | -37       | -11       |
| Denmark       | 6            | 5            | 7            | 6            | 5            | 5            | 6            | 6            | 6            | 5            | -17       | -17       |
| France        |              |              |              | 164          | 176          | 124          | 154          | 131          | 155          | 134          | -14       | -9        |
| Germany       |              |              |              | 39           | 47           | 34           | 34           | 45           | 43           | 36           | -16       | -11       |
| Greece        |              |              |              | 54           | 36           | 42           | 32           | 37           | 60           | 43           | -29       | -2        |
| Hungary       |              |              |              | 36           | 21           | 25           | 36           | 40           | 33           | 35           | 6         | -4        |
| Italy         |              |              |              | 680          | 934          | 650          | 726          | 736          | 764          | 678          | -11       | -9        |
| Latvia        |              |              |              | 0            | 0            | 0            | 0            | 1            | 0            | 1            | 11        | -6        |
| Netherlands   |              |              |              | 274          | 336          | 199          | 327          | 34           |              |              | 1         | 3         |
| Poland        | 31           | 40           | 90           | 40           | 55           | 45           | 65           | 5            |              |              | -19       | 0         |
| Portugal      | 136          | 168          | 198          | 172          | 2            |              |              | 20           |              |              | 0         | -19       |
| Romania       | 21           | 53           |              |              |              |              |              | 1            |              |              | 16        | -14       |
| Slovakia      |              |              |              |              |              |              |              | 0            | 1            | 1            | -20       | -25       |
| Slovenia      |              |              |              |              |              |              |              | 4            | 4            | 1            | -80       | -78       |
| Spain         |              |              |              | 429          | 456          | 461          | 355          | 403          | 344          | 303          | -12       | -21       |
| Sweden        | 2            | 1            | 2            | 1            | 2            | 1            | 1            | 1            | 1            | 1            | 0         | 12        |
| UK            | 29           | 23           | 31           | 33           | 32           | 28           | 26           | 24           | 25           | 28           | 12        | 10        |
| <b>Total:</b> | <b>2,545</b> | <b>2,168</b> | <b>2,603</b> | <b>2,276</b> | <b>2,652</b> | <b>1,888</b> | <b>2,327</b> | <b>2,425</b> | <b>2,394</b> | <b>2,170</b> | <b>-9</b> | <b>-9</b> |

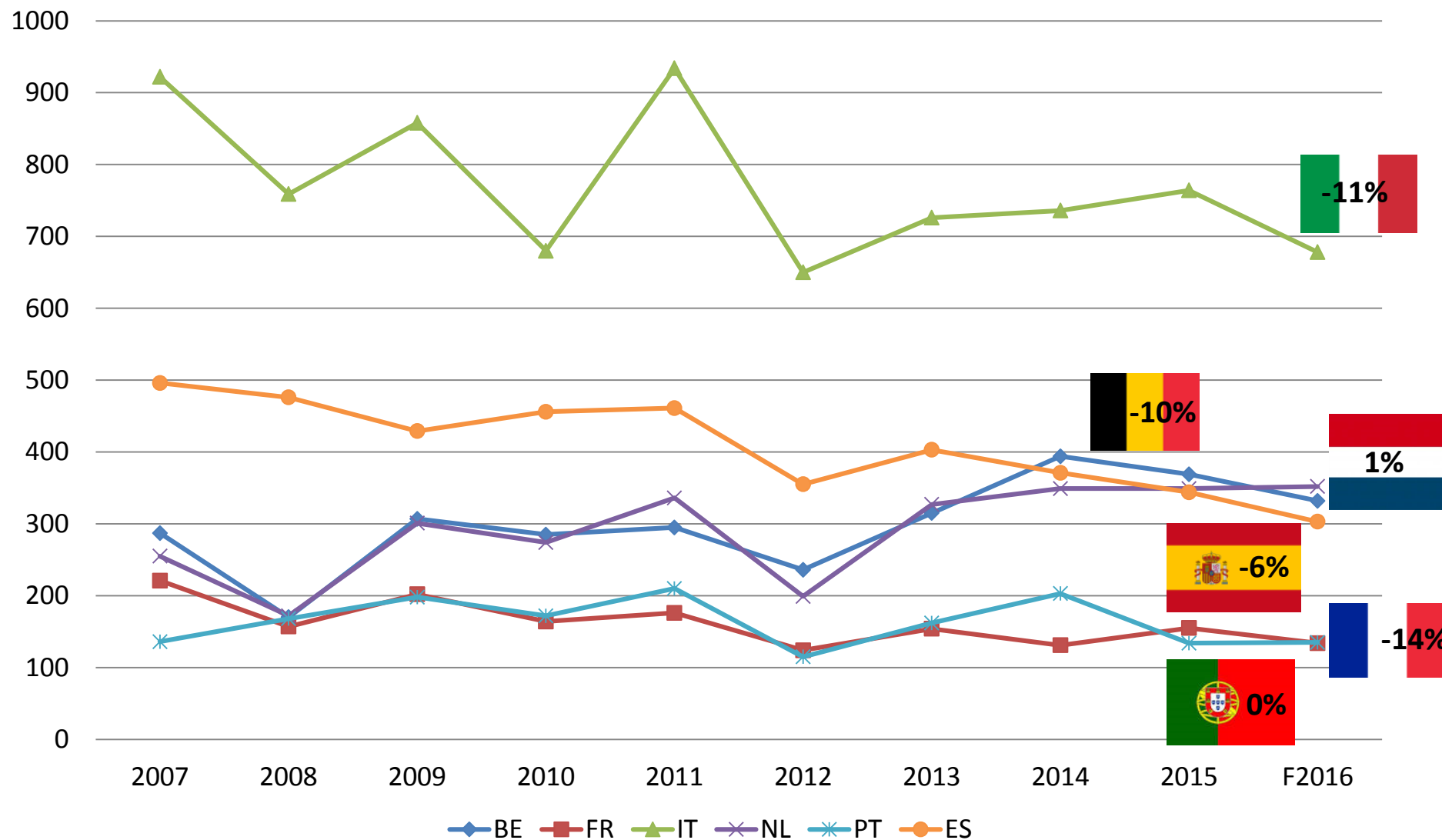


# Country evolution (%16 vs 15)

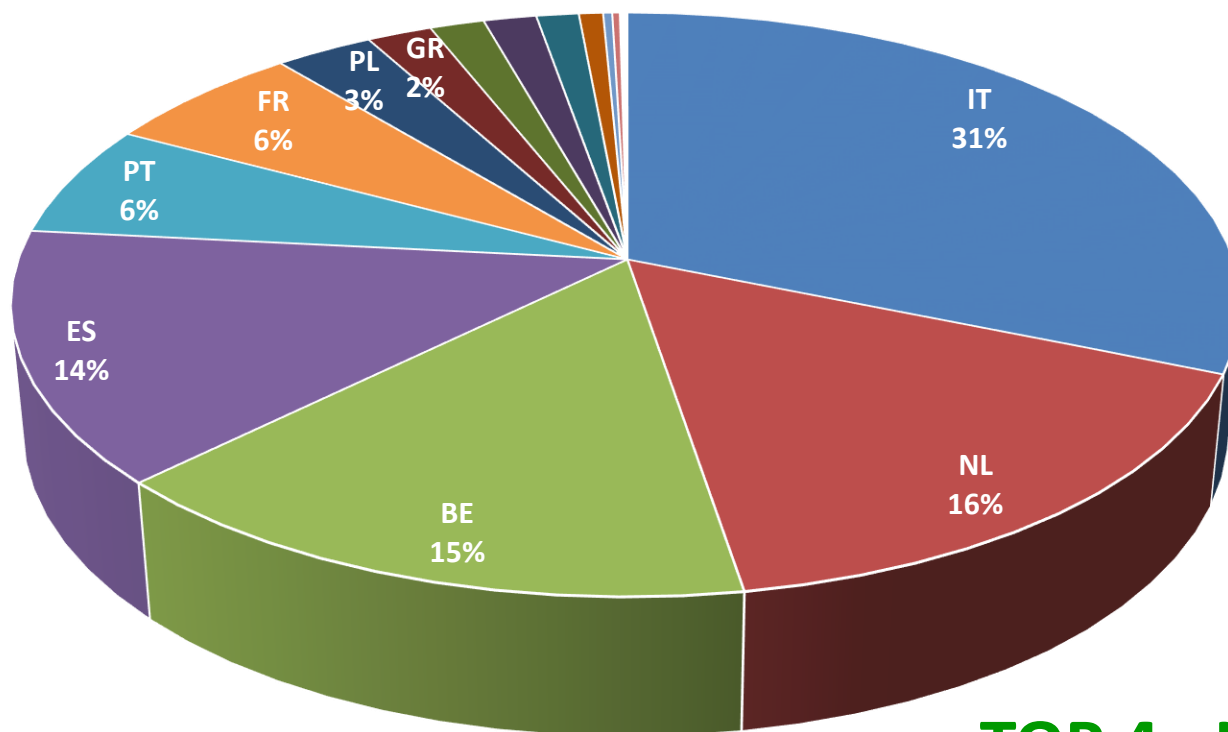


Prognosfruit

3 - 5 August 2016, Hamburg



# EU-28: share by MS



**TOP 4 : IT- ES-BE-NL =  
76 % of the EU production**

# 2016 crop forecast – overview by MS

2.169.942 T (19 MS)

+ ca 50.500 T (remaining 5 MS – Eurostat data)

| x 1000 tons |       |      |       |      |      |      |      |      |      |
|-------------|-------|------|-------|------|------|------|------|------|------|
| Country     | 2007  | 2008 | 2009  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
| Austria     | 175,5 | 84,7 | 168,7 | 36,1 | 73,2 | 58,2 | 54,1 | 50,7 | 51,1 |
| Bulgaria    | 1,0   | 0,9  | 1,4   | 1,4  | 2,0  | 1,4  | 2,9  | 2,2  | 3,0  |
| Cyprus      | 1,1   | 1,2  | 1,3   | 1,3  | 1,2  | 1,1  | 1,1  | 0,8  | 0,9  |
| Luxembourg  | 0,3   | 0,3  | 0,3   | N/A  | 0,2  | 0,2  | 0,2  | 0,3  | 0,3  |
| Finland     | 0,0   | 0,0  | 0,0   | 0,0  | 0,0  | 0,0  | 0,0  | 0,0  | 0,2  |

55.500 T  
-9% (2016?)  
50.505 T

EU- 28 : 2.220.447 T

+ Switzerland : 19.000 T

Grand total : 2.239.447 T

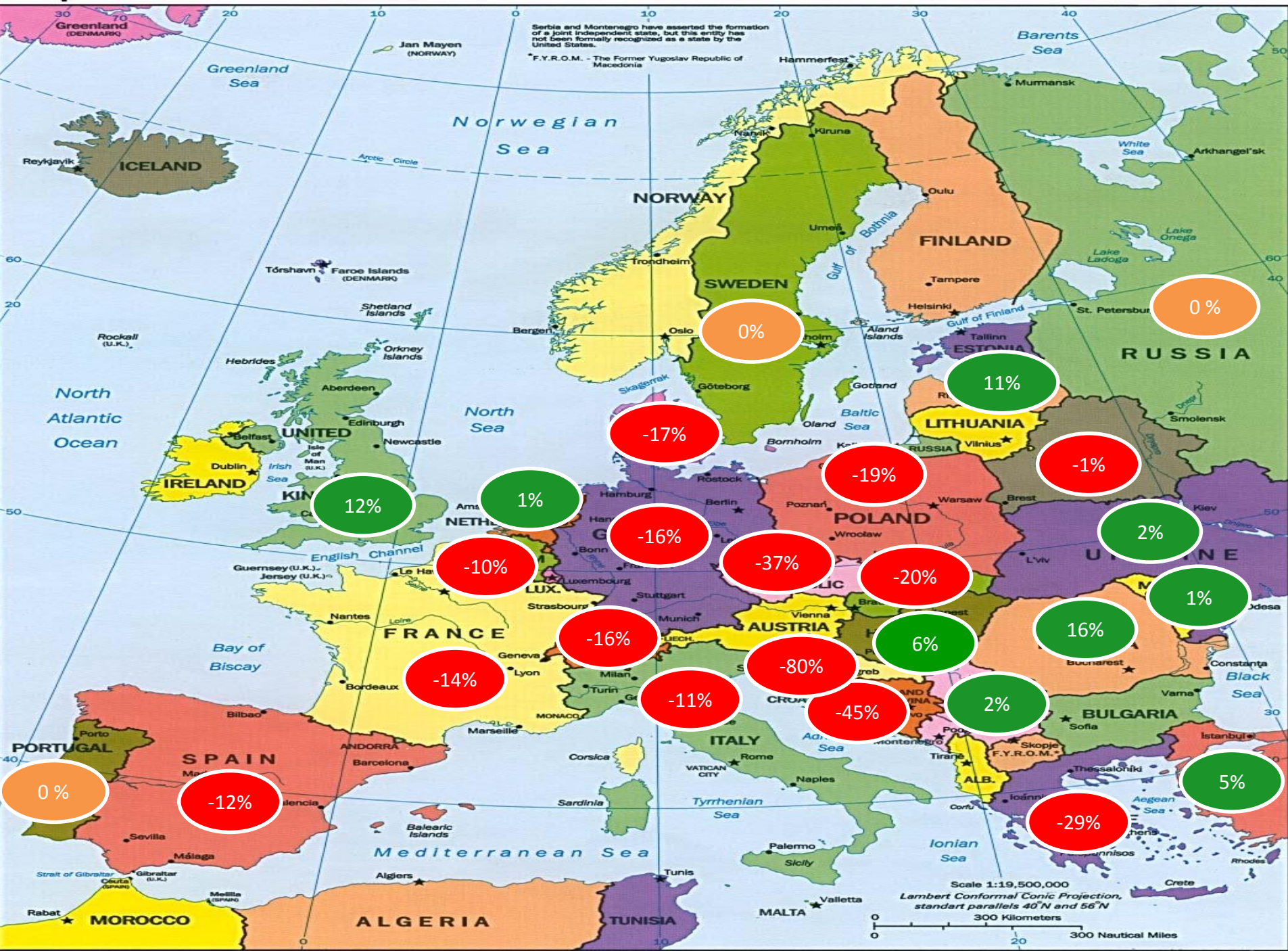
# 2016: other crop forecast (non EU)

*x 1000 tons*

| <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> |
|---------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|------------|------------|
| <b>Belarus</b>            | 44          | 53          | 61          | 60          | 60          | 57          | 48          | 52          | 50          | 50           | -1         | 0          |
| <b>Bosnia-Herzegovina</b> | 21          | 22          | 25          | 23          | 25          | 18          | 10          | 5           | 11          | 6            | -45        | -31        |
| <b>Canada</b>             | 13          | 10          | 8           | 9           | 9           | 6           | 9           | 10          | 10          | 10           | 0          | 3          |
| <b>China</b>              | 13,045      | 13,305      | 14,263      | 15,057      | 15,945      | 17,070      | 17,300      | 17,960      | 17,860      | 19,000       | 6          | 7          |
| <b>Macedonia</b>          | 8           | 8           | 8           | 8           | 2           | 3           | 4           | 3           | 2           |              |            |            |
| <b>Mexico</b>             | 25          | 21          | 25          | 25          | 25          | 22          | 24          | 24          | 24          | 24           | -2         | -1         |
| <b>Moldova</b>            | 4           | 5           | 4           | 5           | 5           | 5           | 4           | 5           | 4           | 4            | 1          | -4         |
| <b>Russia</b>             | 96          | 60          | 69          | 55          | 50          | 50          | 43          | 45          | 46          | 46           | 0          | 3          |
| <b>Serbia</b>             | 61          | 62          | 68          | 48          | 65          | 39          | 42          | 40          | 44          | 45           | 2          | 7          |
| <b>Switzerland</b>        | 27          | 15          | 31          | 18          | 26          | 20          | 22          | 26          | 23          | 19           | -16        | -18        |
| <b>Turkey</b>             | 380         | 361         | 368         | 350         | 360         | 380         | 395         | 290         | 390         | 410          | 5          | 14         |
| <b>Ukraine</b>            | 140         | 126         | 176         | 142         | 153         | 158         | 169         | 157         | 168         | 171          | 2          | 4          |
| <b>USA</b>                | 697         | 677         | 707         | 660         | 720         | 666         | 711         | 663         | 648         | 629          | -3         | -7         |

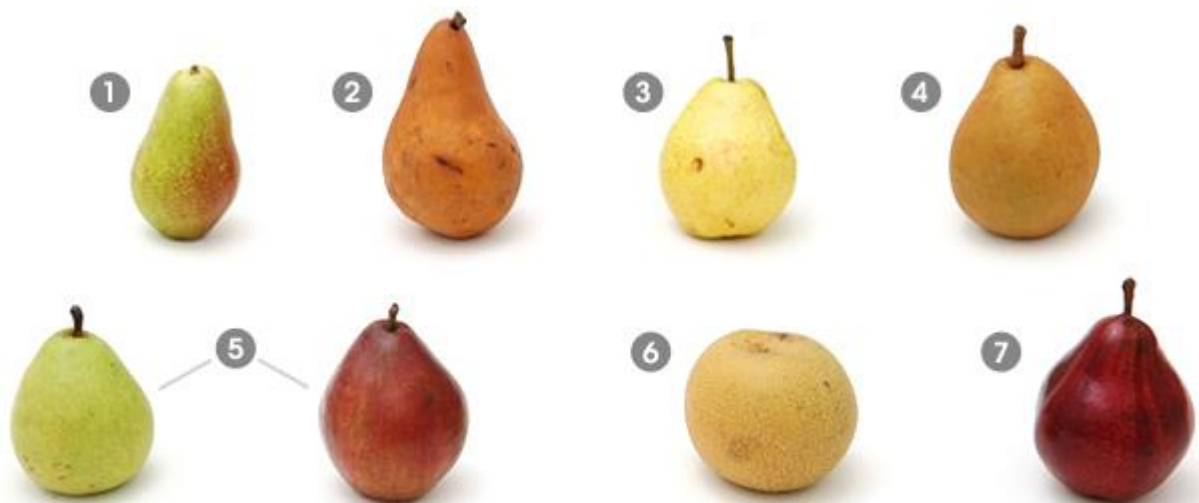


# Europe





# Pear forecast 2016: quantitative approach EU 28 by varieties



# EU 28 variety

| x 1000 tons       |   |       |       |       |       |       |       |       |       |       |       |     |     |   |
|-------------------|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-----|-----|---|
| Variety           |   | 2007  | 2008  | 2009  | 2010  | 2011  | 2012  | 2013  | 2014  | 2015  | F2016 | (1) | (2) |   |
| Abate F           | 2 | 325   | 249   | 306   | 224   | 404   | 256   | 304   | 358   | 333   | 290   | -13 | -13 | ← |
| Blanquilla        |   | 133   | 82    | 86    | 81    | 78    | 59    | 54    | 49    | 44    | 37    | -15 | -24 |   |
| Conference        | 1 | 823   | 639   | 903   | 832   | 928   | 693   | 894   | 951   | 967   | 918   | -5  | -2  | ← |
| Coscia-Ercollini  |   | 110   | 107   | 106   | 98    | 80    | 77    | 80    | 66    | 79    | 66    | -17 | -13 |   |
| Doyenne du Comice |   | 126   | 82    | 116   | 97    | 107   | 58    | 83    | 94    | 87    | 76    | -12 | -13 |   |
| Durondeau         |   | 7     | 6     | 8     | 6     | 7     | 5     | 6     | 6     | 5     | 4     | -22 | -30 |   |
| Guyot             |   | 105   | 98    | 102   | 92    | 96    | 70    | 80    | 67    | 74    | 58    | -21 | -21 |   |
| Kaiser            |   | 59    | 39    | 65    | 42    | 60    | 39    | 54    | 33    | 45    | 39    | -15 | -13 |   |
| Passacrassana     |   | 25    | 21    | 19    | 15    | 17    | 17    | 14    | 11    | 12    | 12    | -4  | -4  |   |
| Rocha             | 4 | 136   | 168   | 197   | 171   | 209   | 115   | 162   | 203   | 134   | 135   | 0   | -19 | ← |
| William BC        | 3 | 322   | 309   | 312   | 286   | 332   | 252   | 283   | 278   | 283   | 252   | -11 | -10 | ← |
| Other             |   | 373   | 369   | 382   | 331   | 333   | 246   | 315   | 309   | 330   | 284   | -14 | -11 |   |
| Total:            |   | 2,545 | 2,168 | 2,603 | 2,276 | 2,652 | 1,888 | 2,327 | 2,425 | 2,394 | 2,170 | -9  | -9  |   |

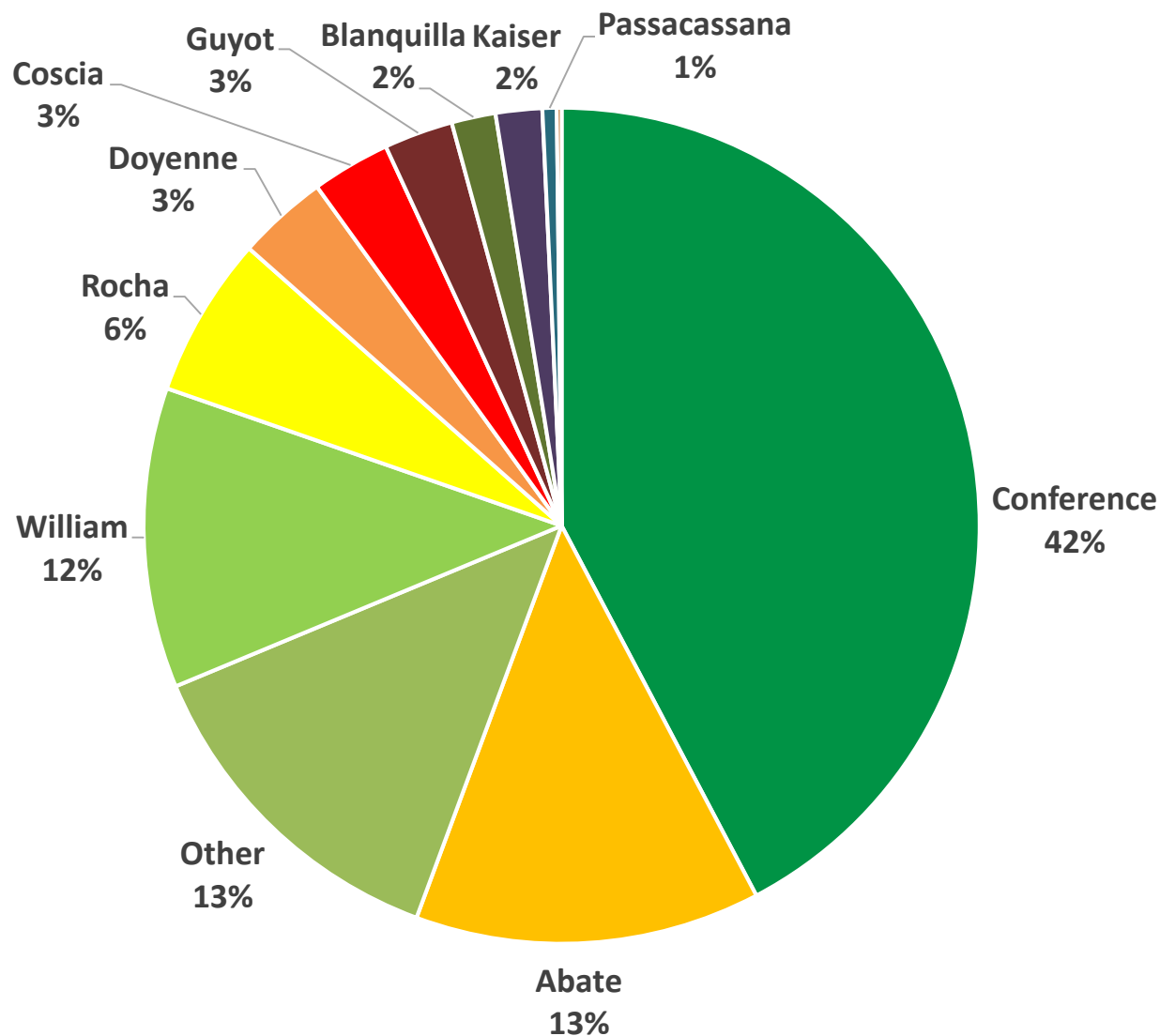


# 2016 crop forecast – overview by varieties



Prognosfruit

3 - 5 August 2016, Hamburg

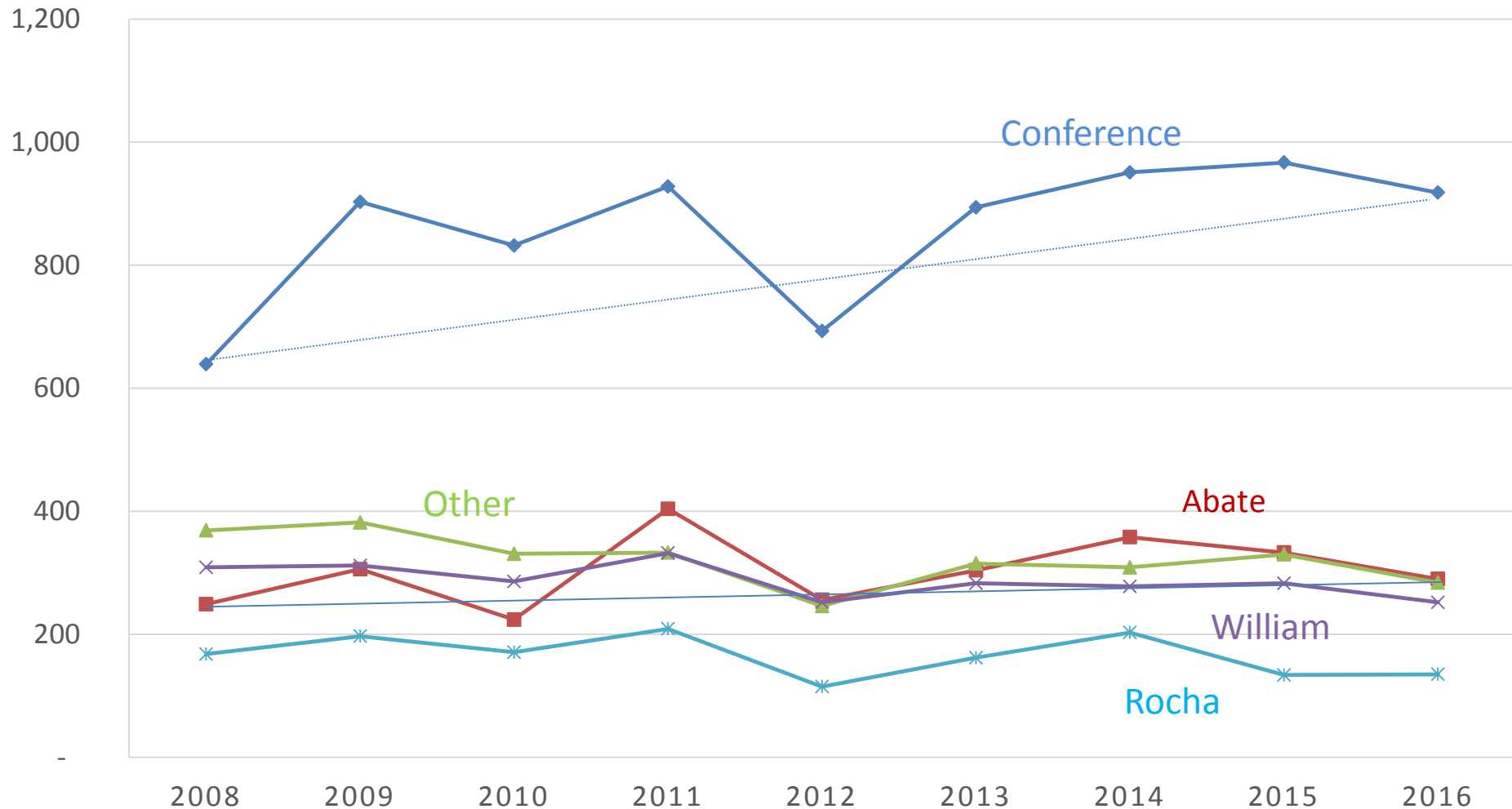


# Varieties yearly variation

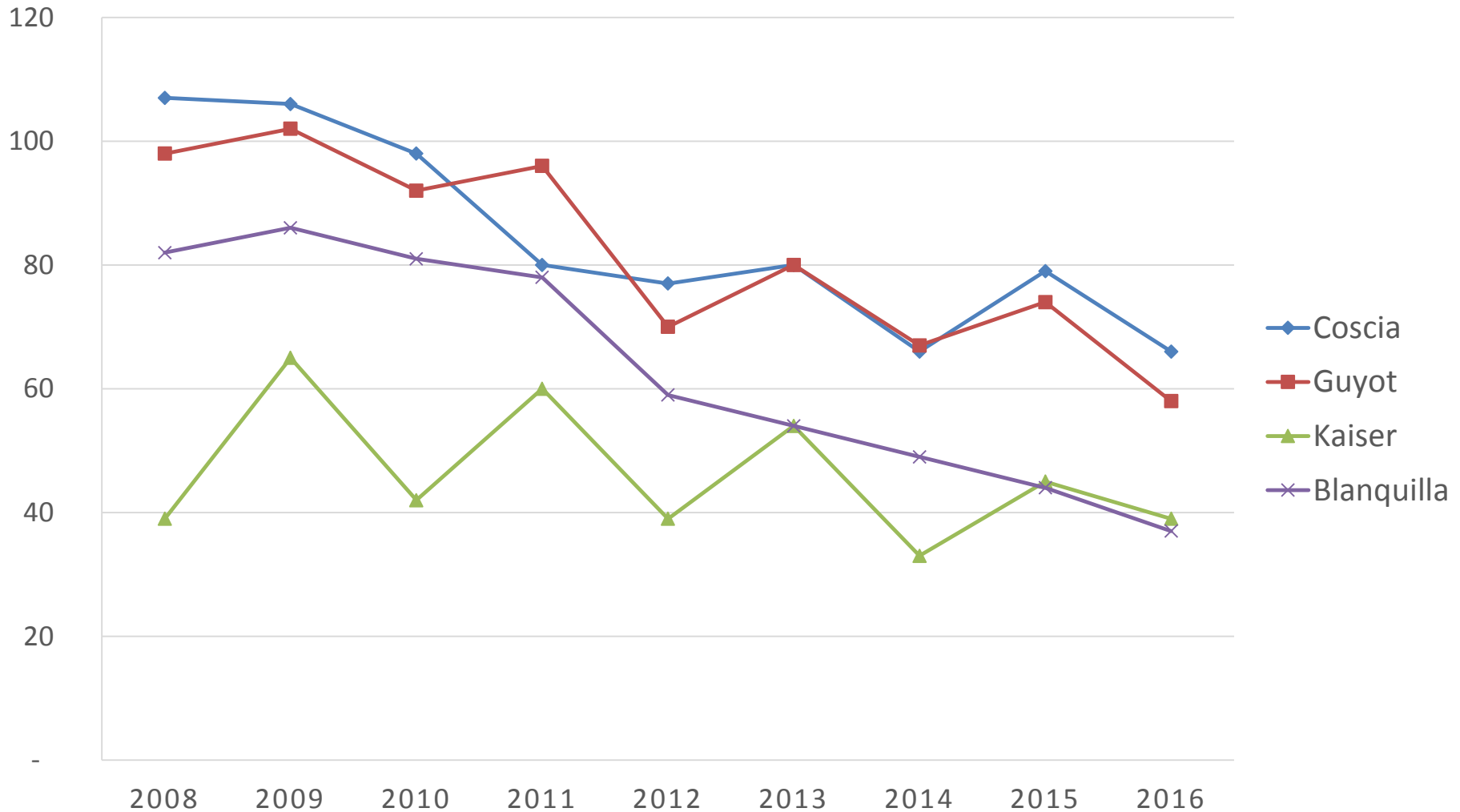
| Country      |              |              | Var in T | var in % |
|--------------|--------------|--------------|----------|----------|
| Conference   | 967          | 918          | - 49     | -5,07%   |
| Abate        | 333          | 290          | - 43     | -12,91%  |
| Other        | 330          | 284          | - 46     | -13,94%  |
| William      | 283          | 252          | - 31     | -10,95%  |
| Rocha        | 134          | 135          | 1        | 0,75%    |
| Doyenne      | 87           | 76           | - 11     | -12,64%  |
| Coscia       | 79           | 66           | - 13     | -16,46%  |
| Guyot        | 74           | 58           | - 16     | -21,62%  |
| Blanquilla   | 44           | 37           | - 7      | -15,91%  |
| Kaiser       | 45           | 39           | - 6      | -13,33%  |
| Passacassana | 12           | 12           | -        | 0,00%    |
| Durondeau    | 5            | 4            | - 1      | -20,00%  |
| <b>Total</b> | <b>2.394</b> | <b>2.170</b> |          |          |



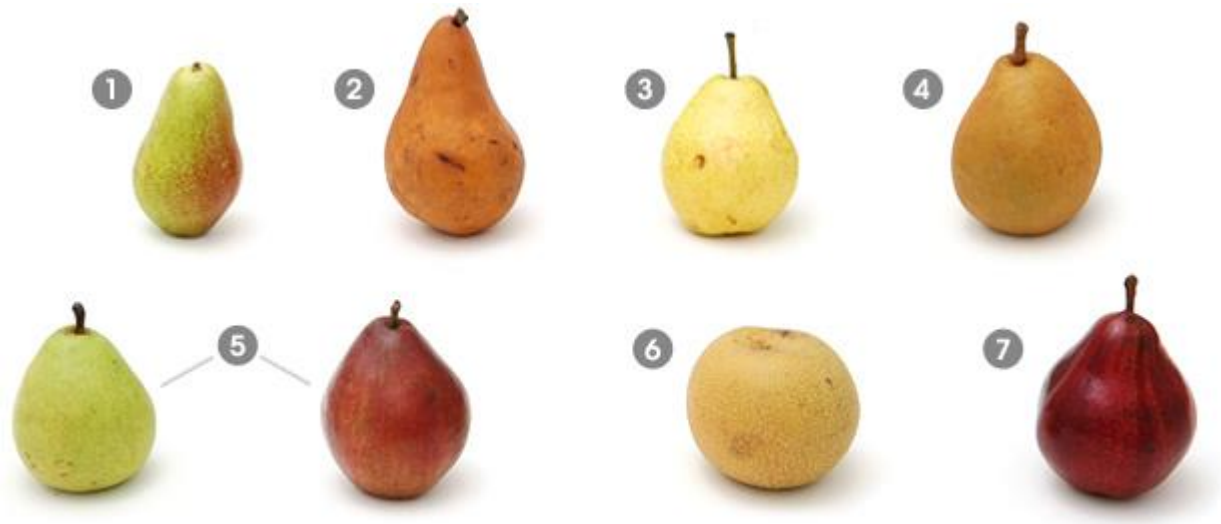
# Main varieties: trends => consolidation



# Other varieties: trends => towards a decline



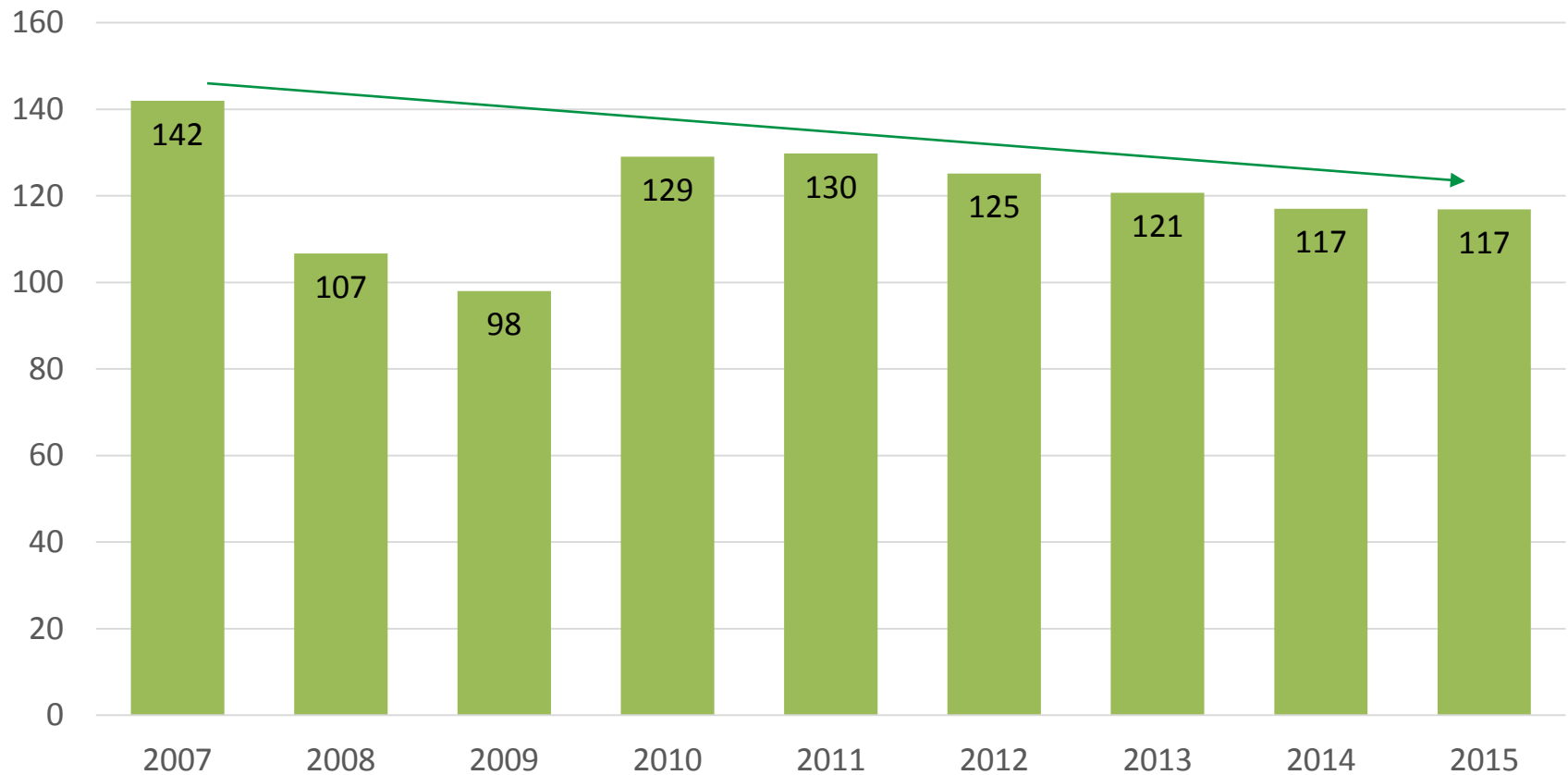
# Pear orchard review



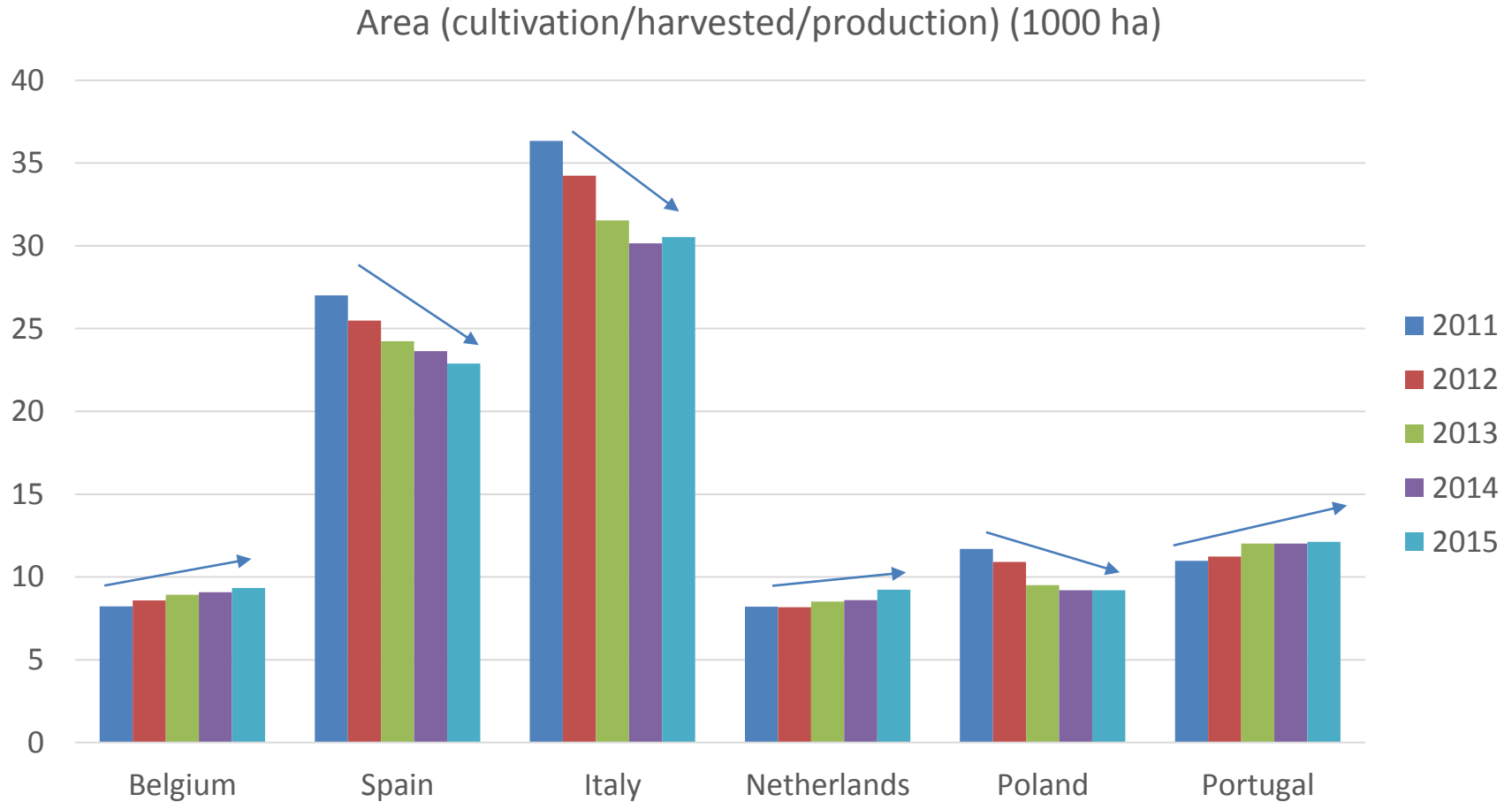


# Pear total EU

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



# Pear per country



# PEAR forecast 2016

## Qualitative and country review



# Growing conditions 2016

## Blossoming

- **Abundant:** most varieties in IT and The Netherlands
- **Normal:** for most varieties in FR, BE, UK, GR and PT
- **Normal/Scare:** Conference (ES)



# Growing conditions 2016

## Fruit setting

- **Abundant:** none
- **Normal:** most of the countries and varieties
- **Weak/Scare:** Conference (BE), Conference, Kaiser, William (IT), Guyot, William (FR), Coscia, William, Kontoula and Kristalli (GR), Doyenne (UK), Conference and Guyot (ES)



# Growing conditions 2016

## Fruit drop

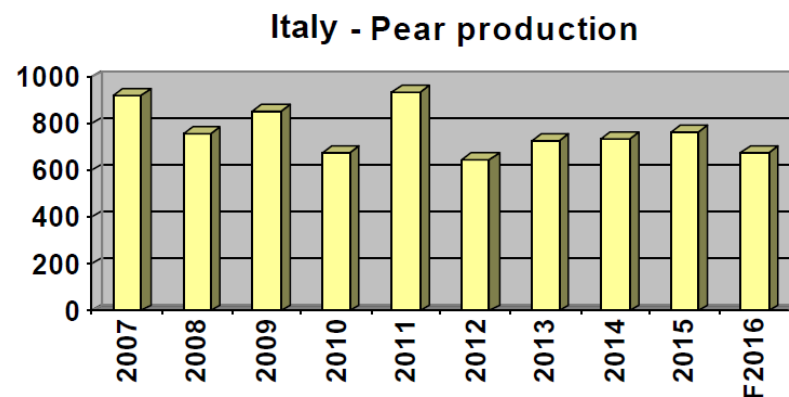
- **Abundant:** Abate, Conference (IT), Rocha (PT), Guyot and Williams (FR)
- **Abundant to Normal:** Conference and Doyenne (BE), Conference (ES)
- **Normal:** NL, UK, GR; Coscia, Guyot (IT), Guyot (ES)





# Italy

- Average low crop at 678.000 T.
- Abate below 300.000 T and William with one of the smallest crop at 156.000 T
- Temperature below average in spring to mid June – no heat wave nor frost. Limited hail in Emilia Romagna, Veneto and Piedmont.
- Sizing satisfactory
- Picking a few days earlier than 2015.
- Slight decrease of surface







# Benelux



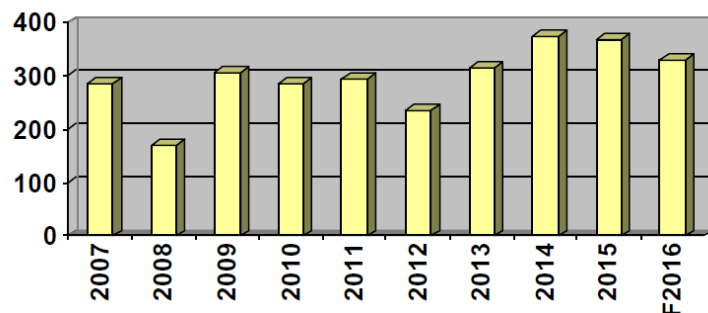
## Belgium

- Conference remains over 300.000 T despite a 10% decline to last year
- Blossoming of Doyenne badly affected by cold and wet weather. Picking a few days later than last year, but overall on average. Impact of wind and hails (23 June). Conference size up to 3 mm larger than last year
- Conference acreage continue to increase (8.360 HA)
- Organic, 1% - processing 5% compared to 3% YAGO

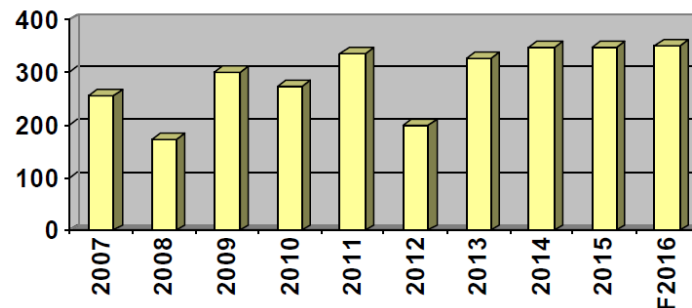
## The Netherlands

- Conference crop just below 290.000 T (5% up). Good growing conditions, good size and normal colouring. Organic around 3%.

Belgium - Pear production



Netherlands - Pear production





# Spain and Portugal



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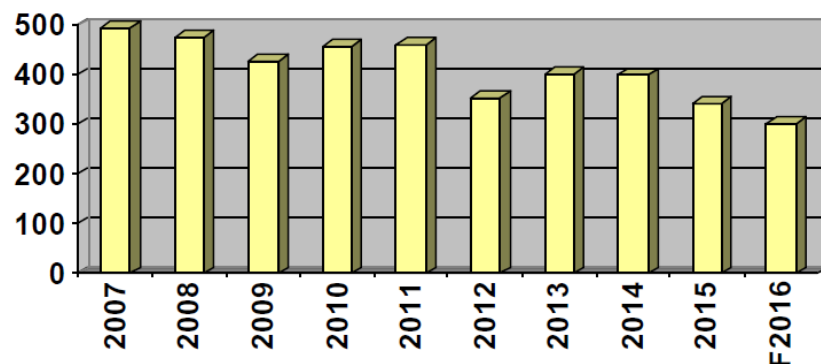
## Spain

- The smallest crop of the last decade at 303.000 T, down from crop well over 400.000 T in the past.
- Main production regions include Catalonia (136.000 T), La Rioja (55.000T), Aragon (40.000 T) and Murcia (22.000 T)

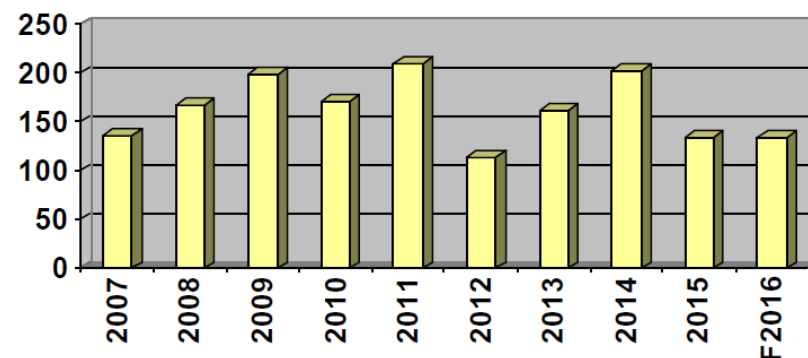
## Portugal

- Small crop at 134.000 T compared to potential, closer to 175.000 T. First estimate only, to be revised soon.

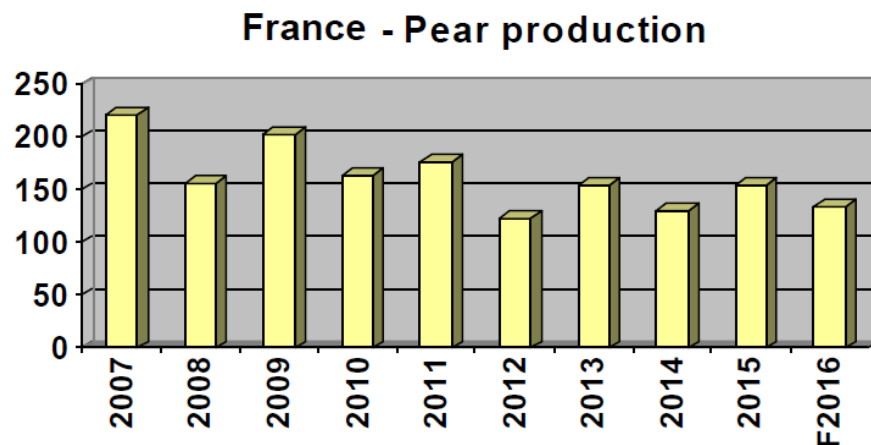
Spain - Pear production



Portugal - Pear production



- Small crop - only smaller crop in 2012 and 2014
- Williams remain the largest but strong decline long term as well as Guyot shortage (in 2016)
- Impact of cold and rain during flowering
- Normal size
- Season to start one or two weeks later, depending of regions
- Organic production is approx. 8%
- 17% to processing



# Other EU countries



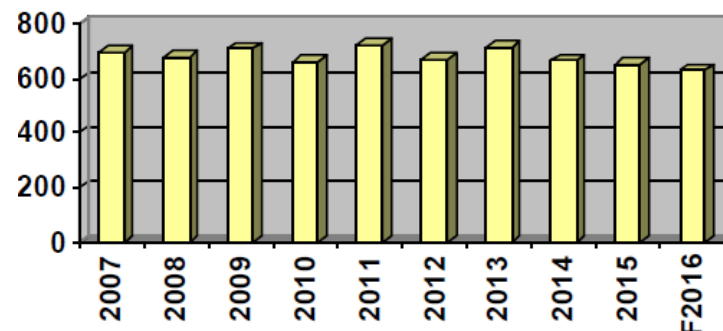
- Poland: 65.000T ( -19% YAGO but within 3 Y average)
- Greece: 43.000 T (-29% YAGO, -2% to 3 Y average)
- Germany: 36.000 T (-16% YAGO and -11% to 3Y average)
- UK: 28.000 T (+12% to YAGO and 10 to 3 Y average)



# USA

- Crop at 629.000 T
  - lower than last year (-3%)
  - lower than 3Y average (-7%)
- No major weather issues, good pollinisation
- Sizing seems to be bigger than average and good colouring
- Slightly earlier picking
- Organic continue to increase ( $\pm 6\%$  in Oregon/Washington vs  $3\%$  in California).
- Limited new varieties, but increase acreage  
Bartletts/Williams in OR and CAL

USA - Pear production





# SH production 2016



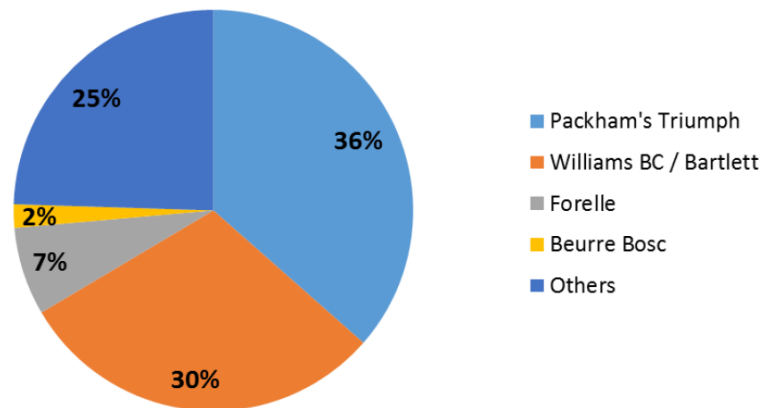
## Pears

*x 1000 tons*

| Country      | 2008         | 2009         | 2010         | 2011         | 2012         | 2013         | 2014         | 2015         | F2016        | (1)       | (2)       |
|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|-----------|-----------|
| Argentina    | 723          | 895          | 770          | 843          | 801          | 863          | 794          | 810          | 716          | -12       | -13       |
| Australia    | 130          | 127          | 107          | 130          | 124          | 129          | 107          | 104          | 96           | -7        | -15       |
| Chile        | 189          | 176          | 170          | 195          | 191          | 201          | 170          | 196          | 177          | -10       | -6        |
| New Zealand  | 9            | 12           | 11           | 11           | 9            | 12           | 10           | 12           | 13           | 11        | 15        |
| South Africa | 342          | 366          | 356          | 360          | 361          | 379          | 399          | 380          | 376          | -1        | -3        |
| <b>Total</b> | <b>1,393</b> | <b>1,577</b> | <b>1,414</b> | <b>1,539</b> | <b>1,486</b> | <b>1,583</b> | <b>1,479</b> | <b>1,501</b> | <b>1,378</b> | <b>-8</b> | <b>-9</b> |



SH Pear production by variety



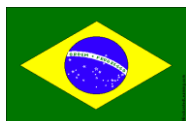


# Southern Hemisphere 2015



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3 - 5 August 2016, Hamburg

## Export



### Southern Hemisphere Pear Exports by Country



| Country (MT) | 2013           | 2014           | 2015           | F2016          | -1         | -2         |
|--------------|----------------|----------------|----------------|----------------|------------|------------|
| Argentina    | 434,996        | 438.500        | 343.030        | 360.000        | 5%         | -11%       |
| Australia    |                | 700            | 10.000         | 9.000          | -10%       | 152%       |
| Chile        | 142,000        | 116.000        | 139.000        | 124.000        | -11%       | -6%        |
| New Zealand  | 4,719          | 4.972          | 4.166          | 4.203          | 1%         | -9%        |
| South Africa | 197,912        | 203.660        | 192.043        | 187.379        | -2%        | -5%        |
| <b>TOTAL</b> | <b>779,627</b> | <b>763.832</b> | <b>688.239</b> | <b>684.582</b> | <b>-1%</b> | <b>-8%</b> |





# Closing remarks



# What's next ?

- Improved tools of EU withdrawal support

| €/T            | Charity | Other |
|----------------|---------|-------|
| CAP withdrawal | 33,96   | 25,47 |
| Russia         | 23,85   | 15,90 |

- But “competition” between apples and pears in Russian measures

| COUNTRY | T      |
|---------|--------|
| PL      | 88,900 |
| BE      | 25,700 |
| NL      | 6,900  |
| IT      | 5,300  |
| FR      | 3,600  |
| ES      | 2,300  |
| DE      | 1,900  |
| PT      | 1,100  |



# Brexit or not?

- UK market for EU suppliers worth 90-95 mio € for pears => Impact of Brexit/exchange rate fluctuation for leading suppliers during next season?

| Reporter EU  | 2015             | 2014             | 2013             | 2012              |
|--------------|------------------|------------------|------------------|-------------------|
| <b>Total</b> | <b>93,557.00</b> | <b>96,765.20</b> | <b>79,772.20</b> | <b>100,757.50</b> |
| Netherlands  | 36,025.80        | 35,714.60        | 28,528.20        | 42,775.50         |
| Belgium      | 30,584.40        | 32,001.70        | 24,315.50        | 27,334.80         |
| Portugal     | 19,301.60        | 20,592.60        | 16,581.90        | 18,944.00         |
| Italy        | 5,374.10         | 5,224.20         | 6,140.40         | 5,764.50          |
| France       | 1,028.00         | 475.60           | 960.40           | 1,350.30          |
| Ireland      | 632.70           | 506.90           | 499.10           | 535.70            |
| Spain        | 467.50           | 1,587.70         | 1,892.70         | 2,819.90          |

Total EU & third  
countries imports  
into UK :150.000 T =>  
over 64% from the EU



# Closing remarks and parameters for the season

- ✓ Low production season (including for two main varieties with 49.000 T less of Conference and 43.000 T less of Abate)
  - ✓ A positive starting point for a fresh start?
  - ✓ A remedy to low prices of 2015/216?
- ✓ Internally
  - ✓ Consumption needs to be stimulated again
  - ✓ Impact of Brexit: consequences of exchange rate ?
- ✓ Internationally
  - ✓ Still huge pressure due to the Russian embargo, industry to look for alternative and improved market access, but rather slow process!
  - ✓ Low attractiveness of EU market for import to remain with lower crop?
- ✓ Let's look now at Helwig Schwartau analysis....!



# Thank you for your attention

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

[www.prognosfruit.eu](http://www.prognosfruit.eu)

