

Pear Market Analysis & Trends

PROGNOSFRUIT - CONGRESS 2016

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natürlich informiert.

Russian ban – Traders accept the challenge

- ... less pear crop
 - 220.000 tons vs. 2015
- ...good quality with more consumption/exports
- ...less overseas imports?

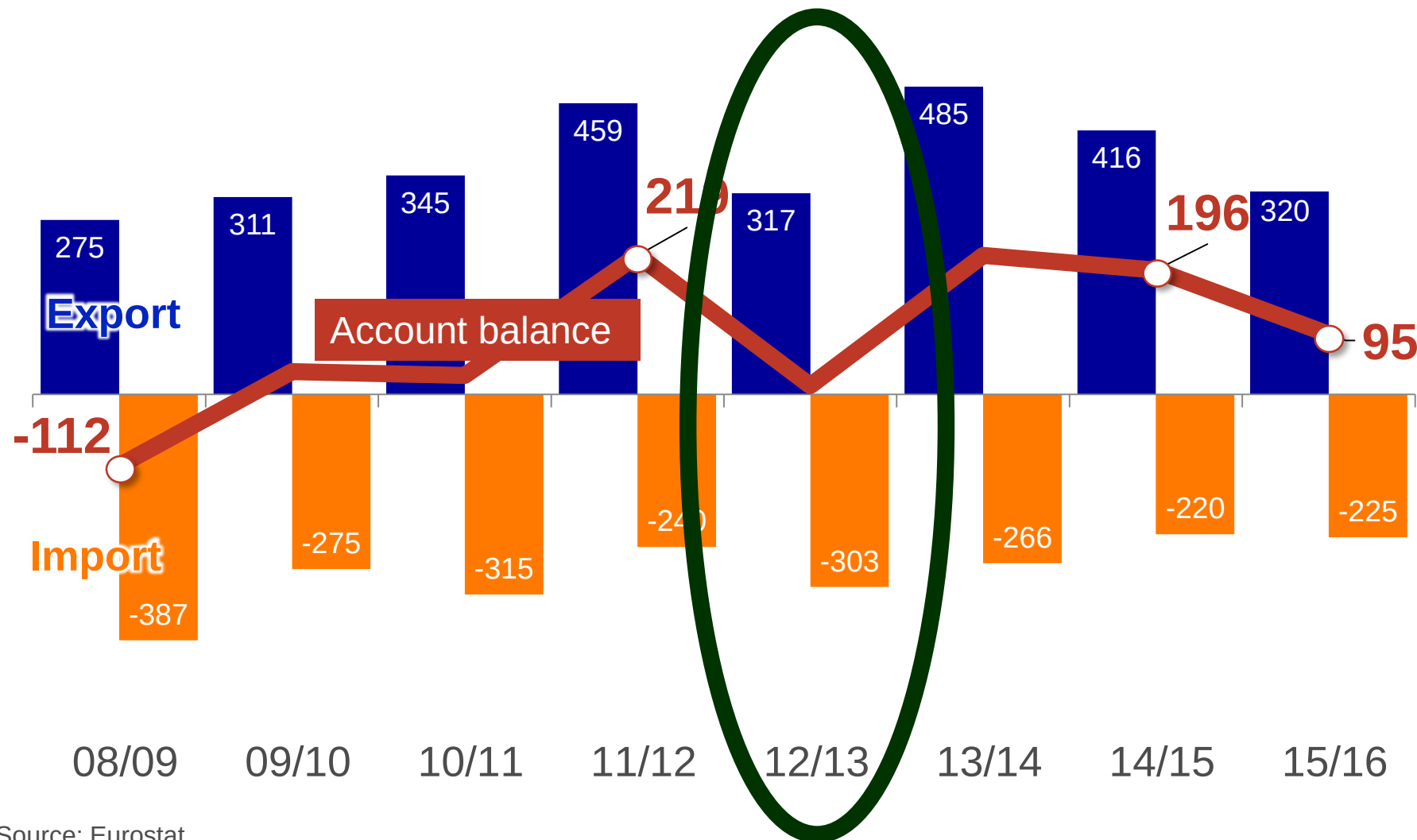
**Positive
atmosphere and outlook**



Less EU pear exports, missing Russia



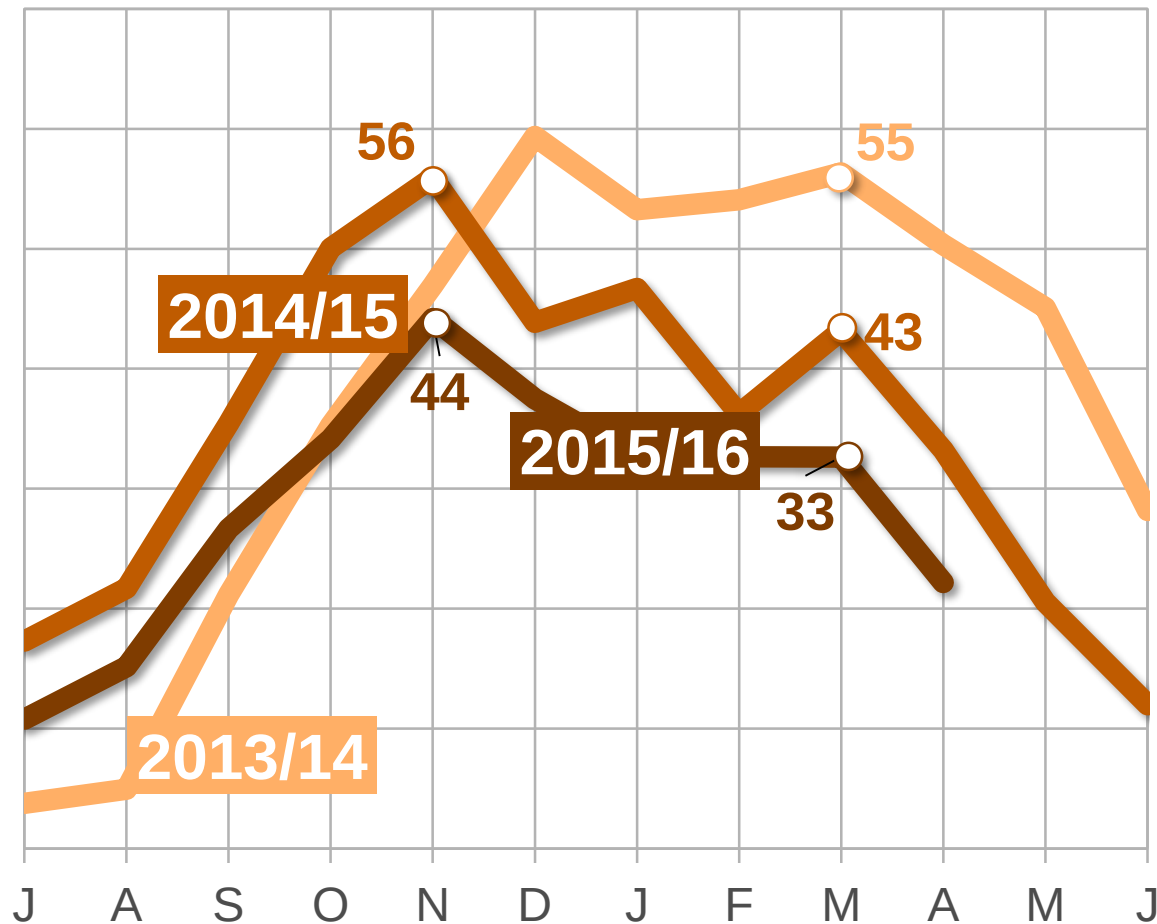
Ø-Current account balance for EU pears (1.000 tons)



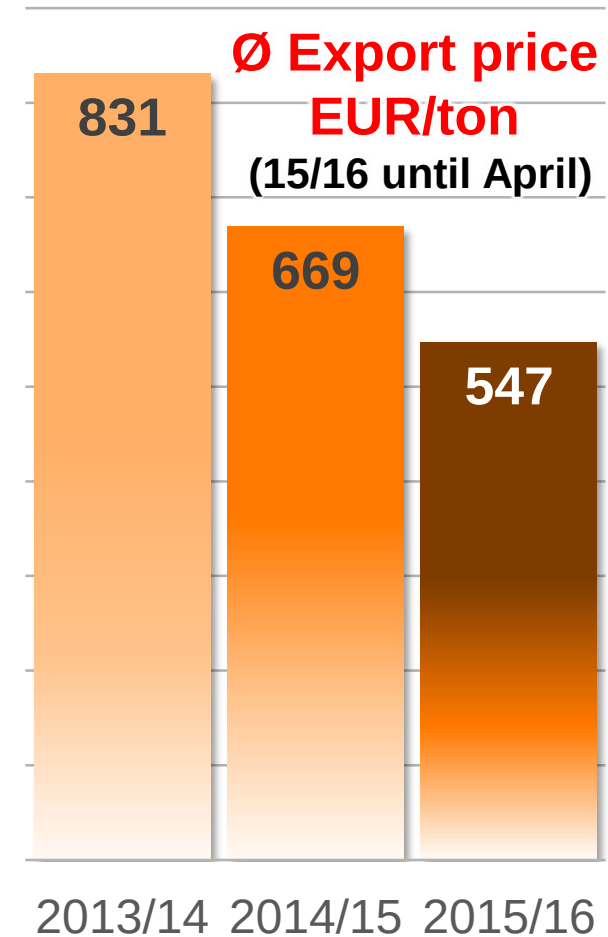
Source: Eurostat

EU pear export dropped clearly down

Monthly EU apple exports, in 1.000 tons



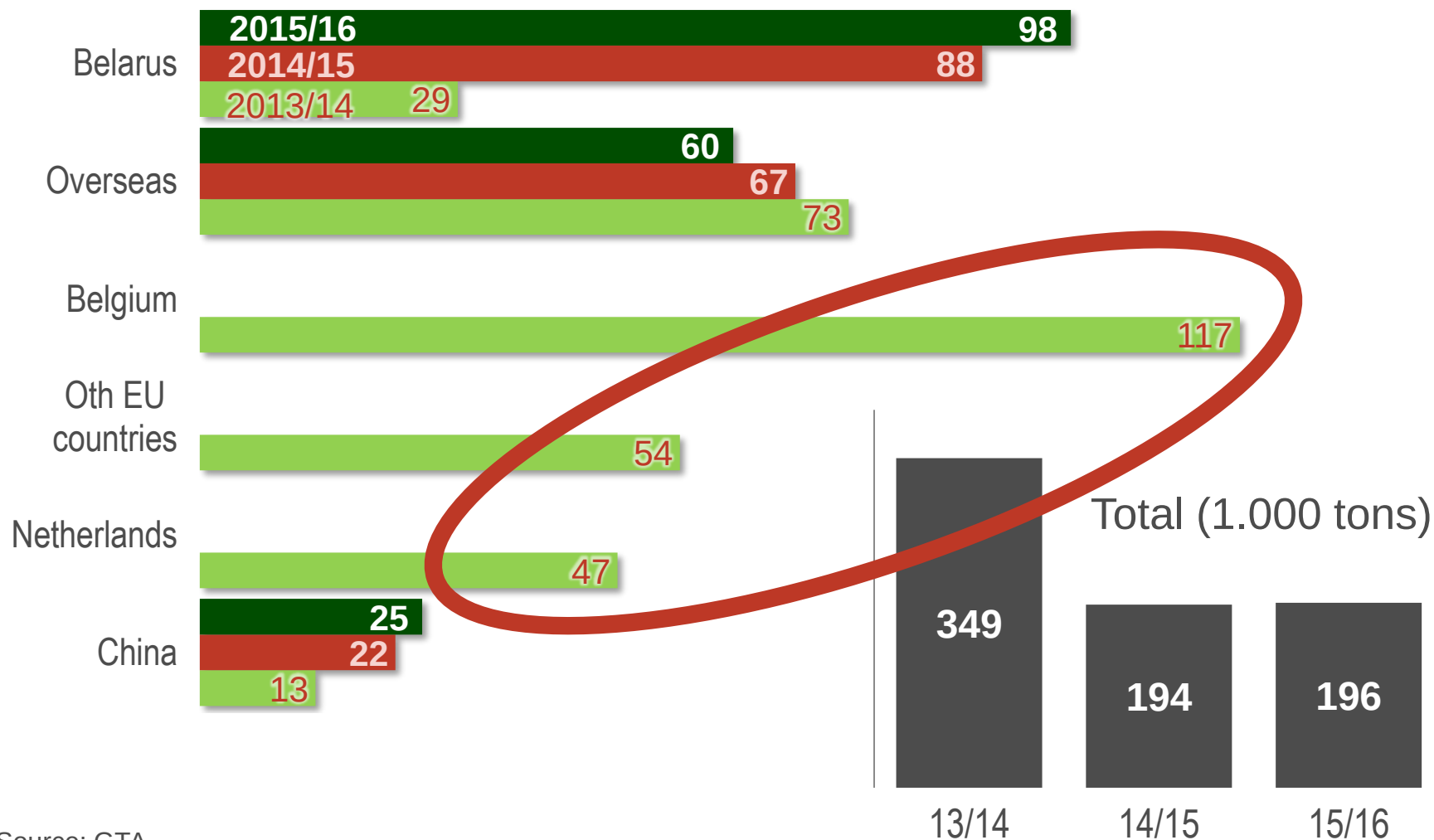
Source: Eurostat



Russia- Overseas exporter not interested



Russian pear imports October to May, 1.000 tons

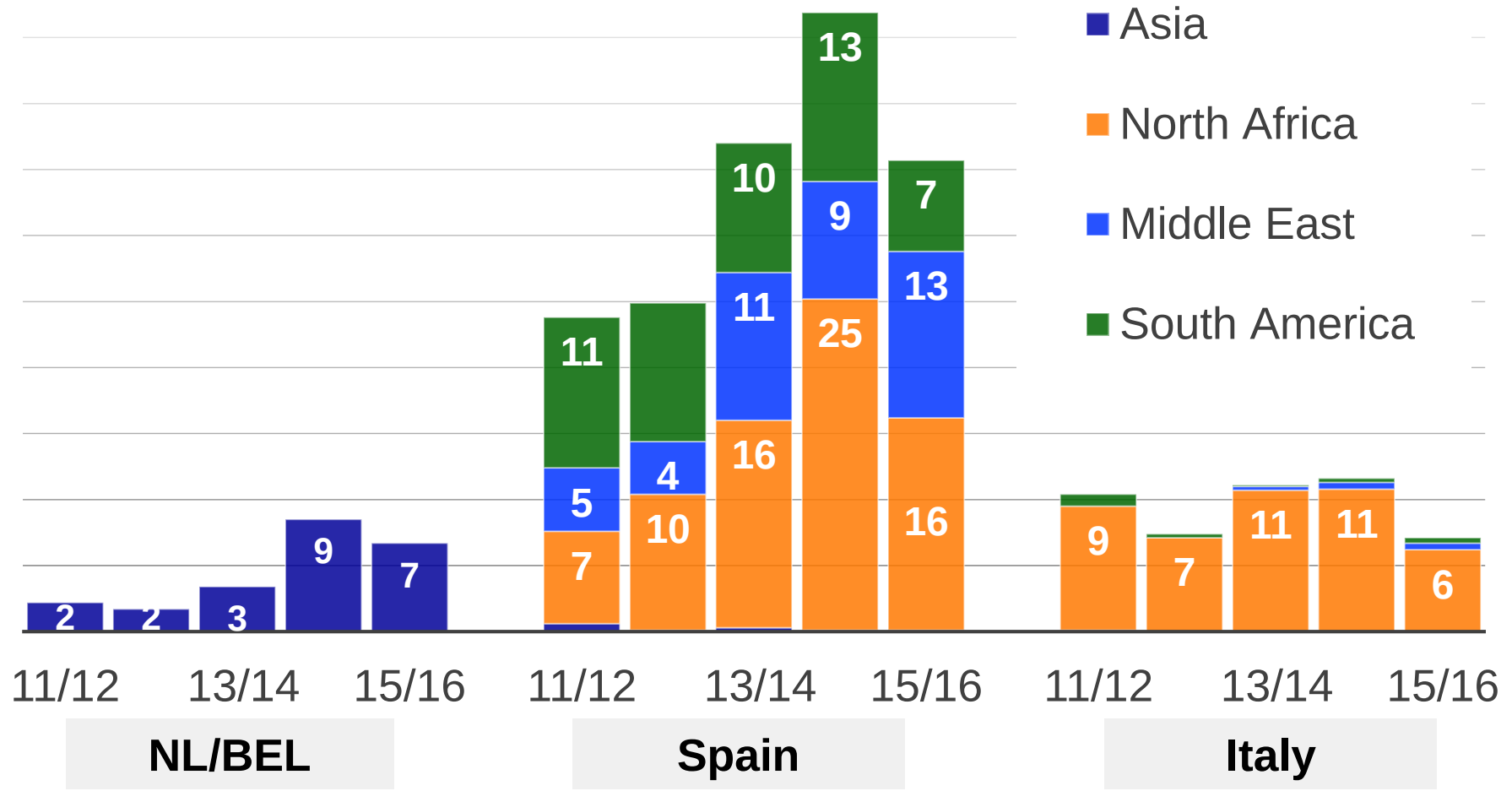


Source: GTA

EU pears – New markets in focus



EU pear exports to markets outside of Europe (Aug. – April), 1.000 tons



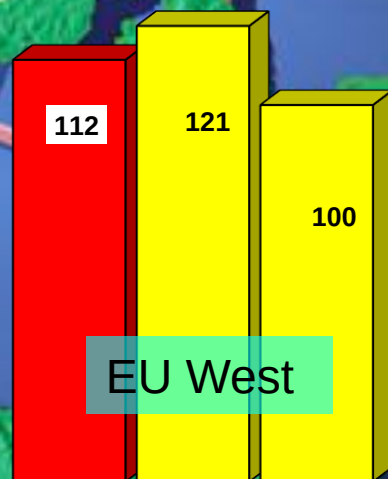
Source: Eurostat

The Netherlands – pear exports

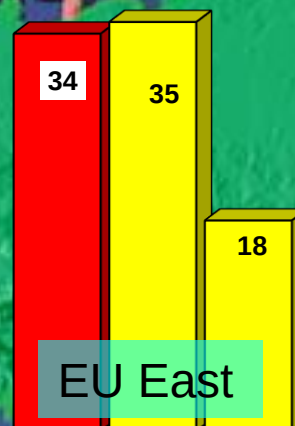
August 2015 till May 2016 (2014-15, 2015-16)

Source: KCB

NL
158.000 t
(171.000 t)
(186.000 t)



EU West



EU East



Europe East

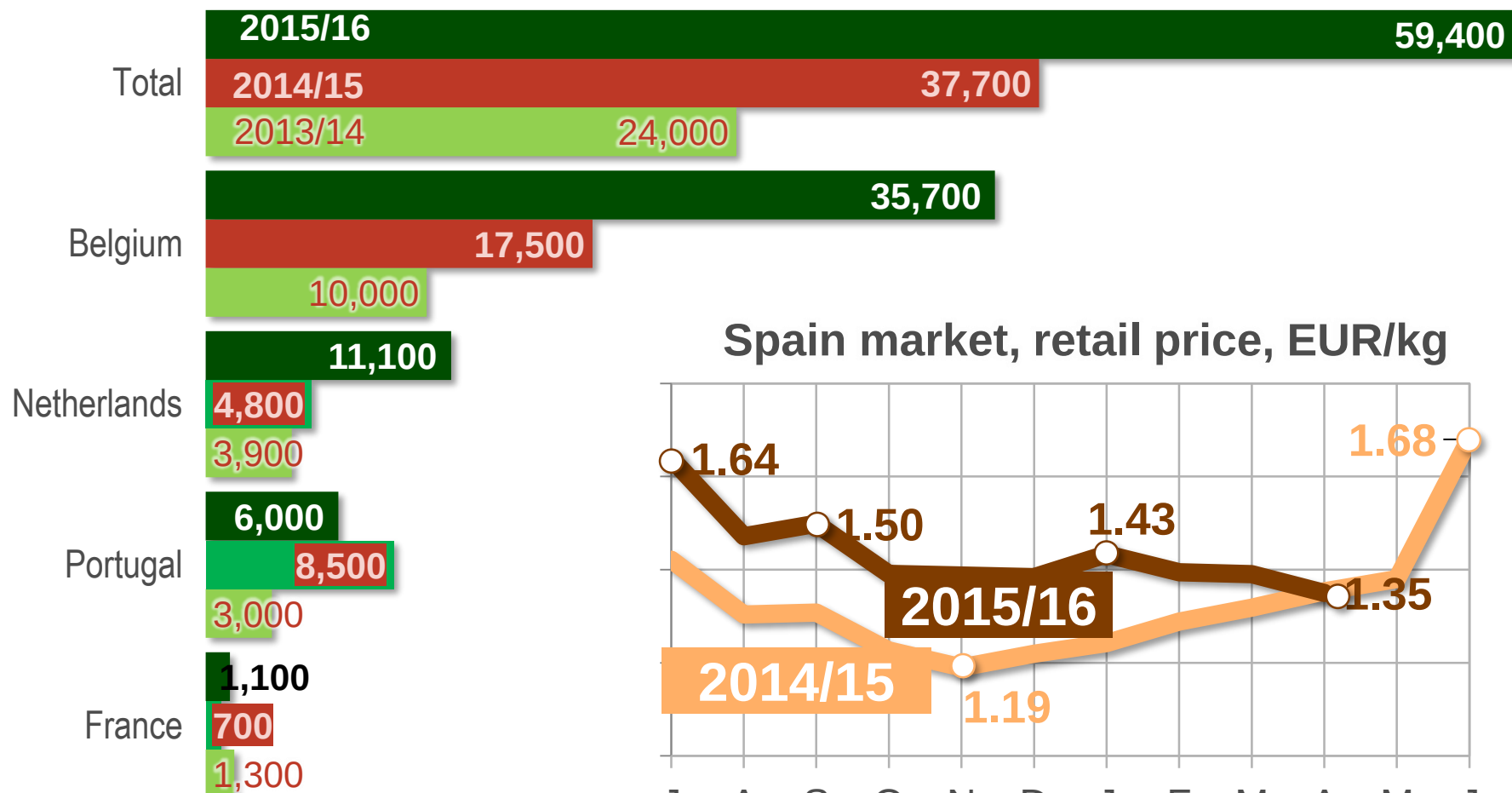
-3.000 t vs.
2014/15

Belgium: Total export 296.000 t (+9%) Source: Eurostat (August-April)
EU West + 30.000 t (+25%) EU East -12.000 t (-27%) Europe East -1.000 t (-3%)

Spain – Opened import market!



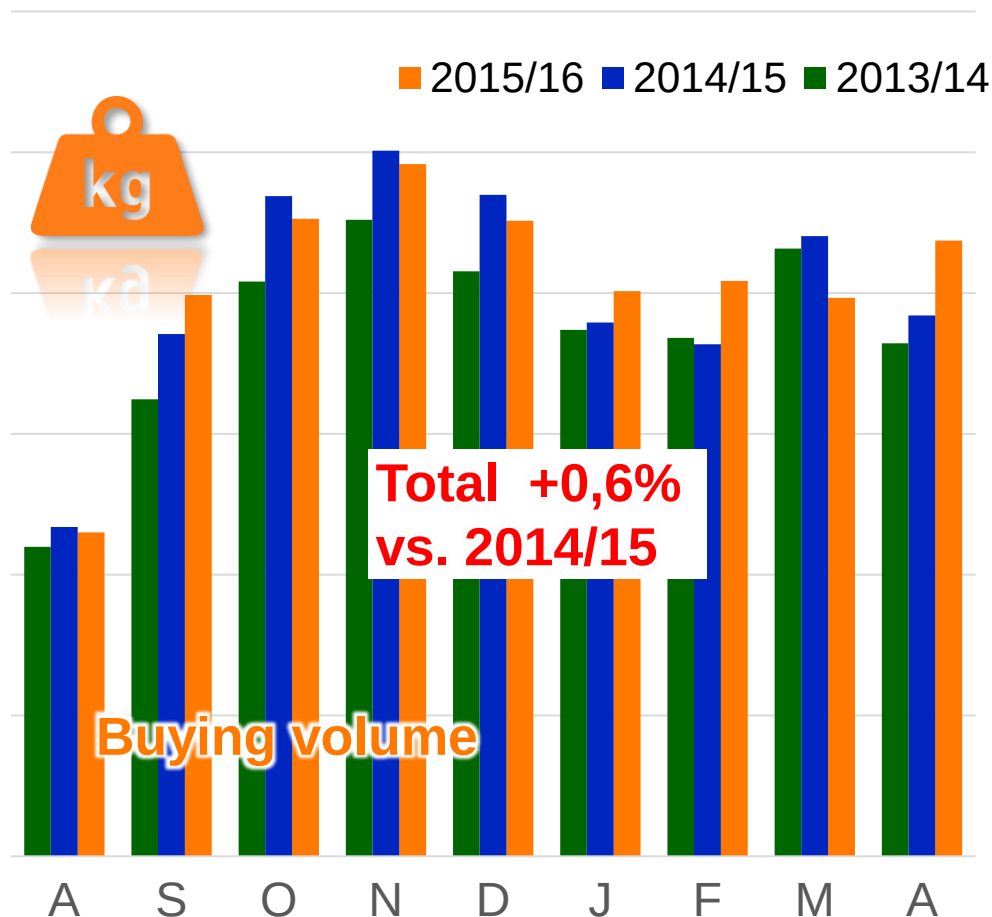
Spain pear imports August to April, 1.000 tons



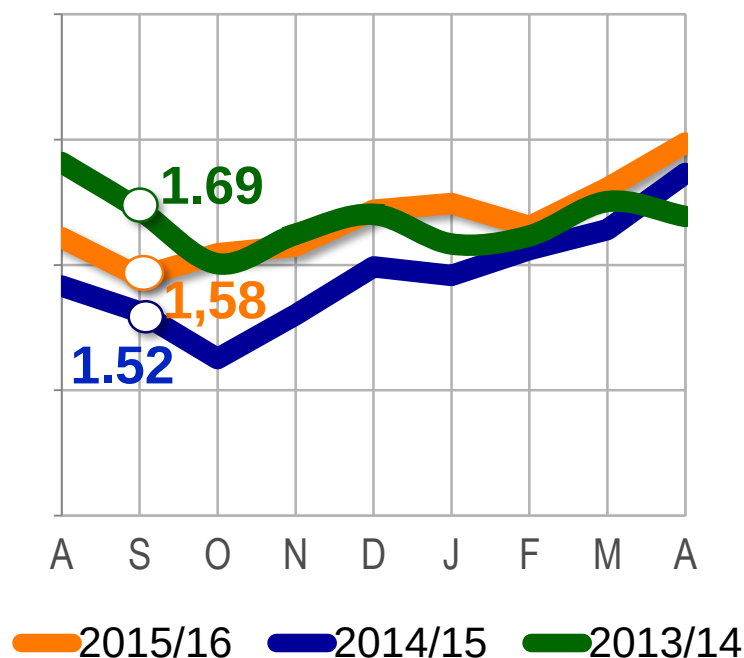
Source: Eurostat, Spain panel data

Stable EU pear consumption

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



Ø Monthly EU retail price



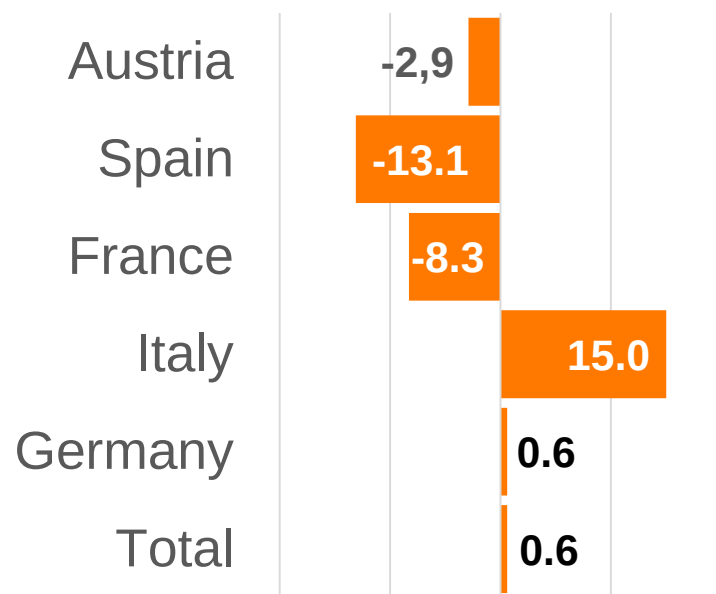
Source: AMI, European panel data

EU – Retail price for pears increased

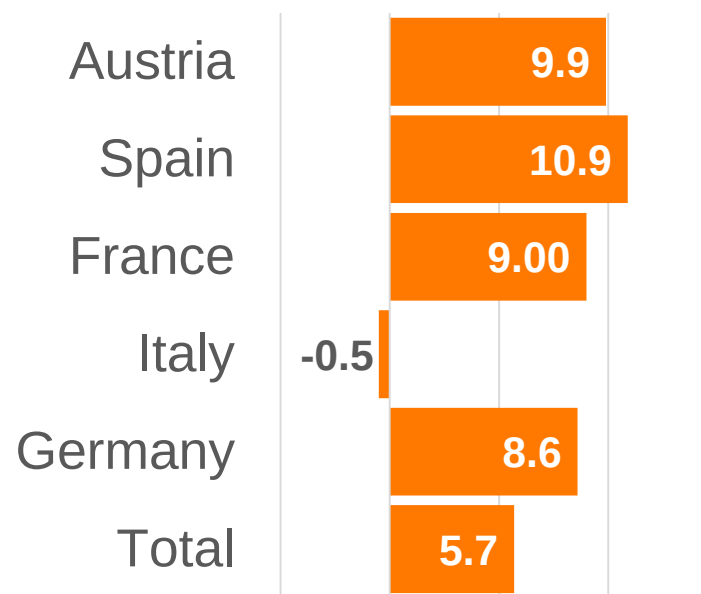


Retail – Development of volume and price, July to April

Retail volume (%)
2015/16 vs. 2014/15



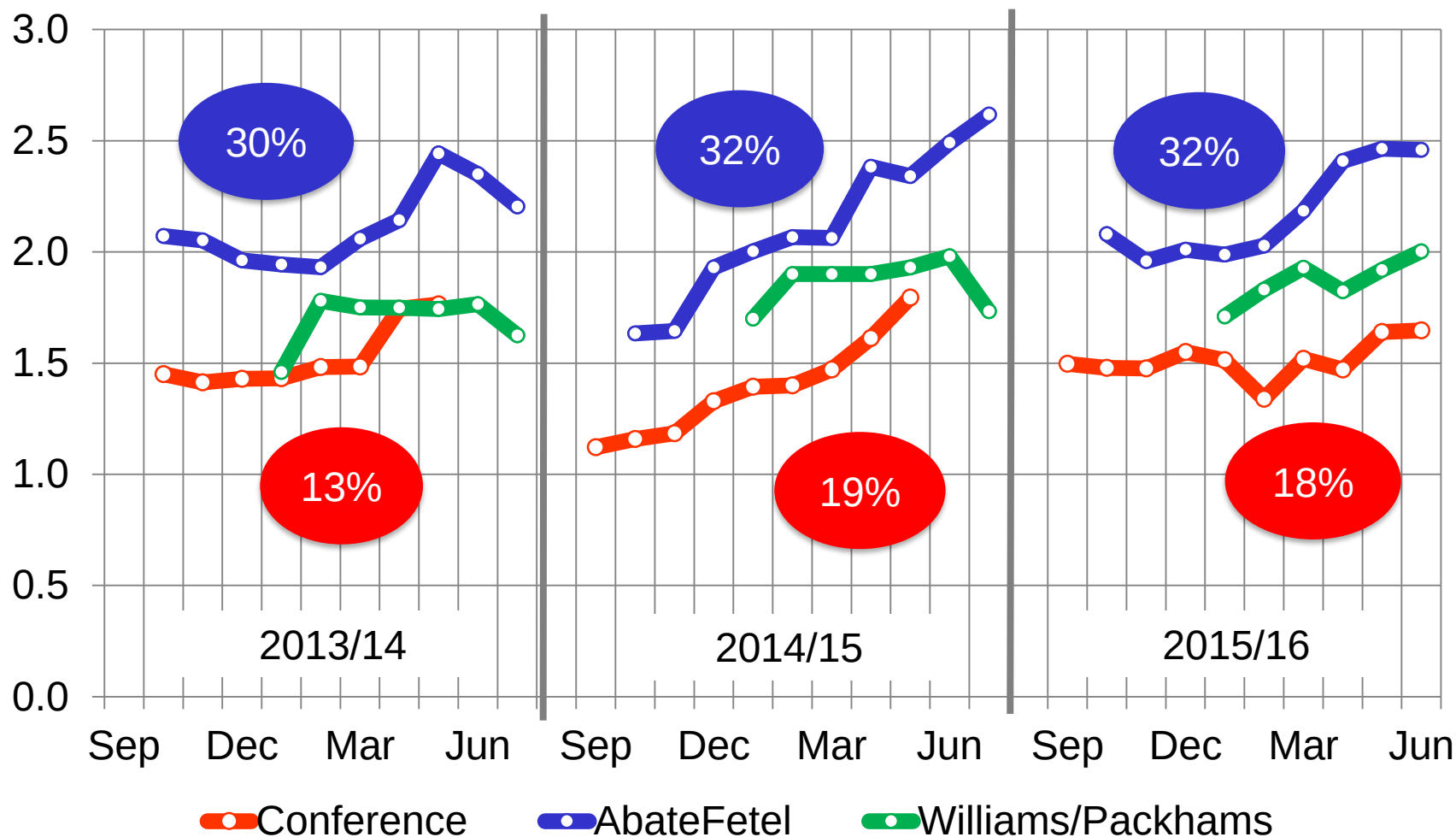
Retail price (%)
2015/16 vs. 2014/15



Source: European panel data

The German consumer preferred Abate

Germany: Retail prices (EUR/kg) and market share (%) for pear varieties

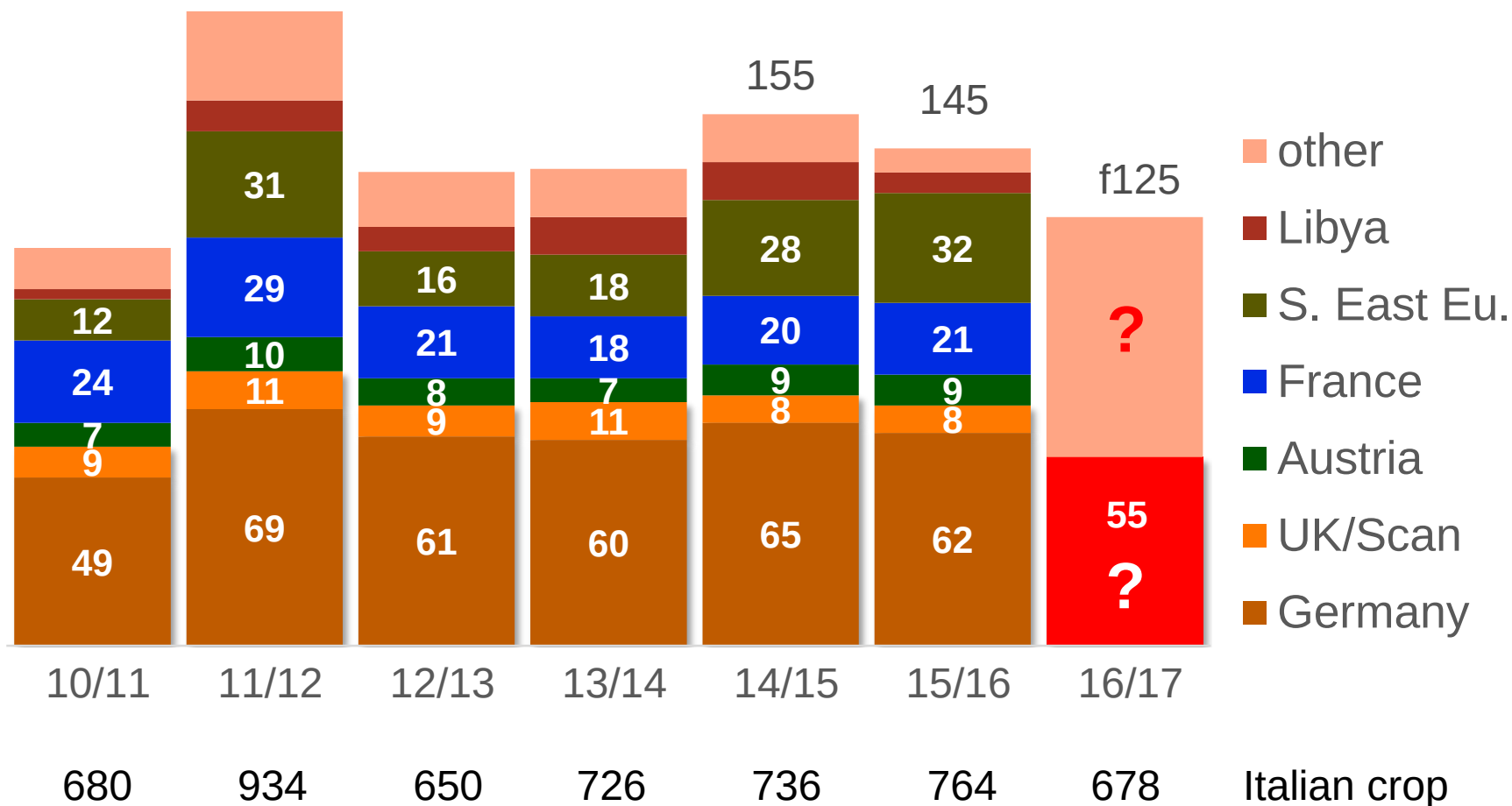


Source: GfK

Italy – Small crop, less exports 2016/17



Italian pear exports, July to April, in 1.000 tons



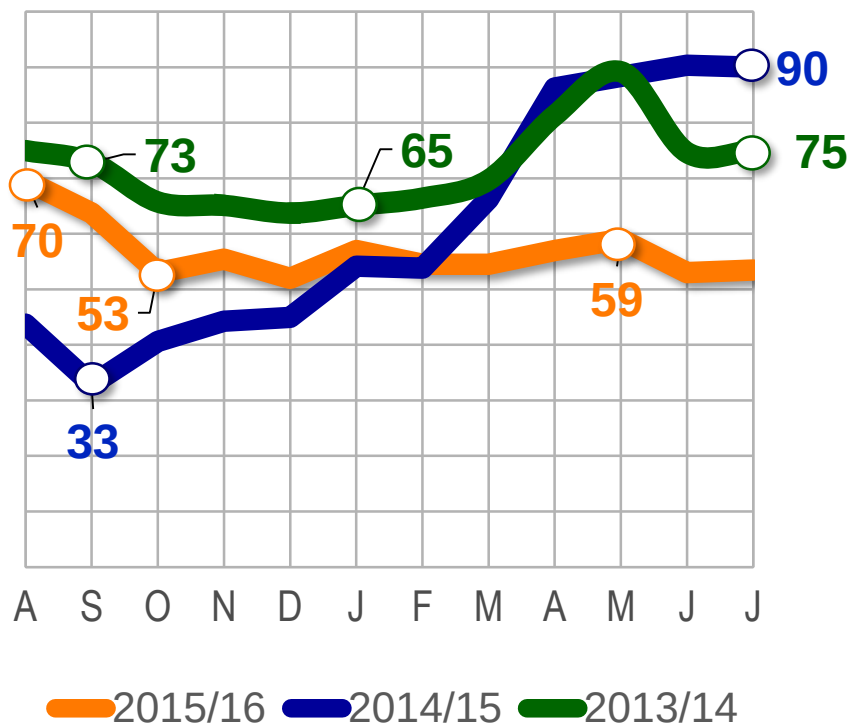
Source: Eurostat/WAPA

Increasing pear price in 2016/17?

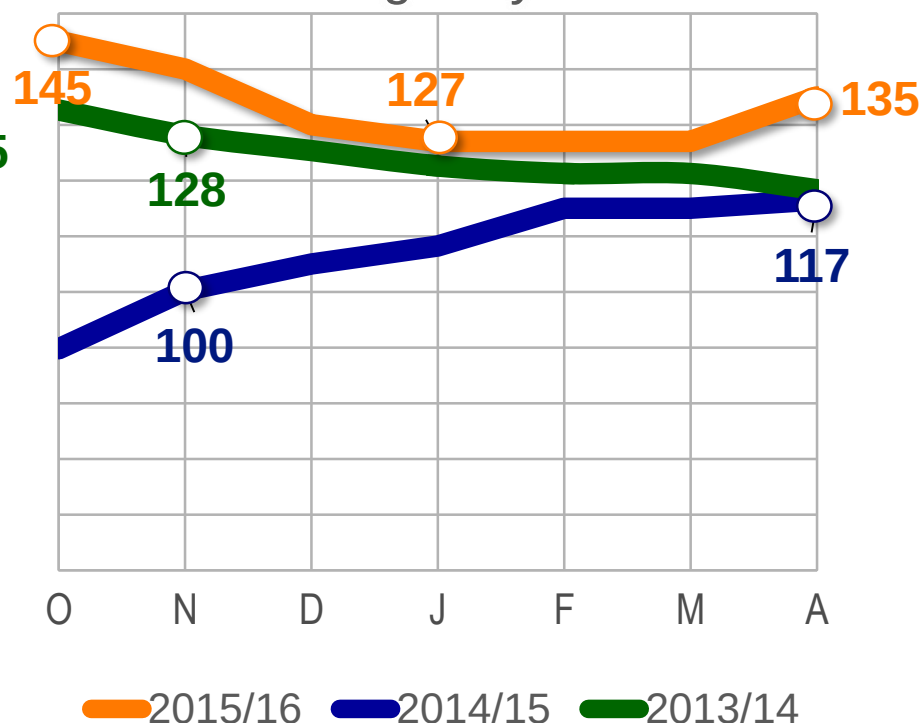


Price for pears, EUR/100kg net

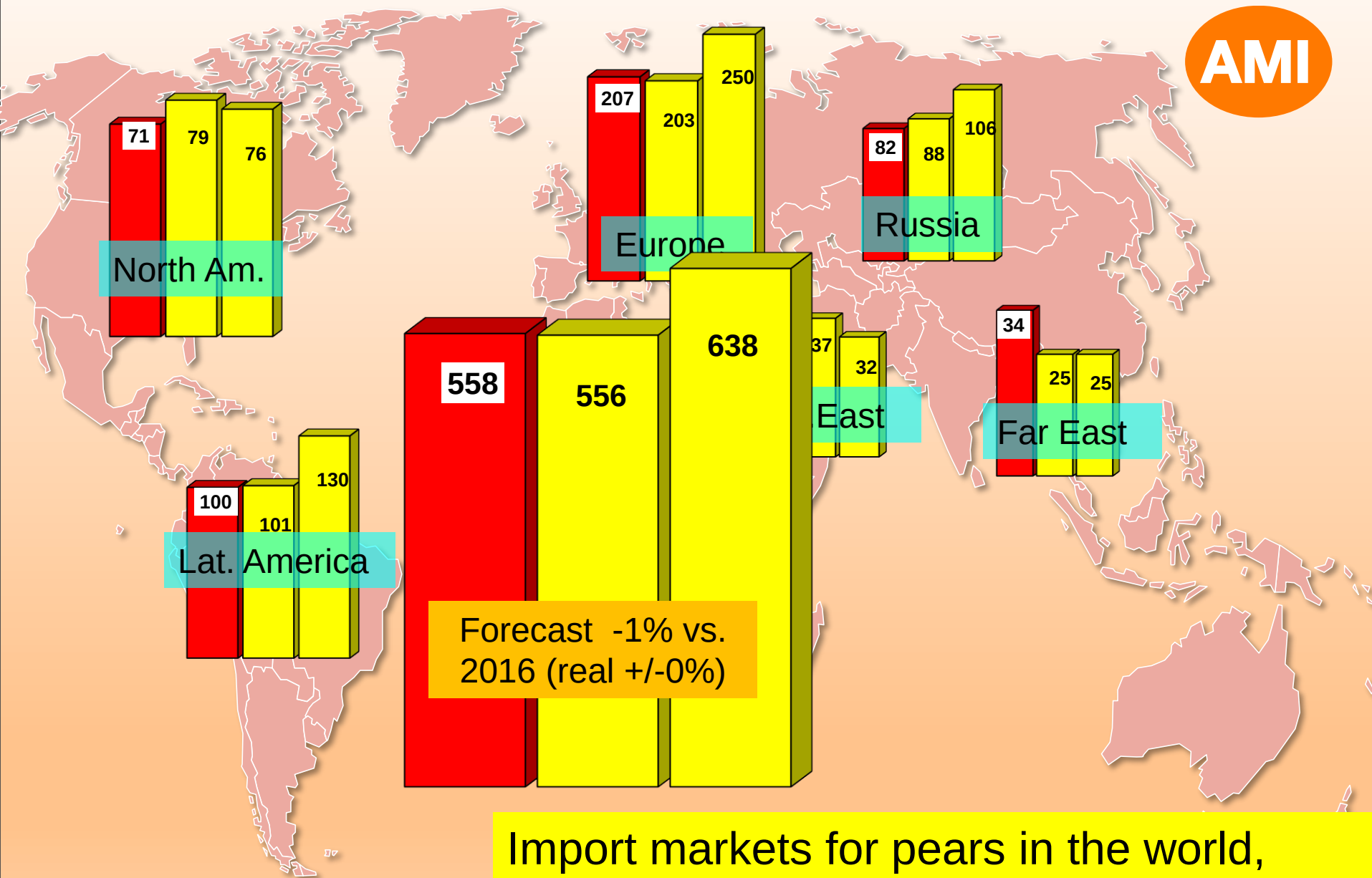
BEL/NL – Veiling price
Conference class I, 65-75mm



Italy – Export price
Abate Fetel single layer 70-75mm



Source: ITA/BEL/NL producer organisations

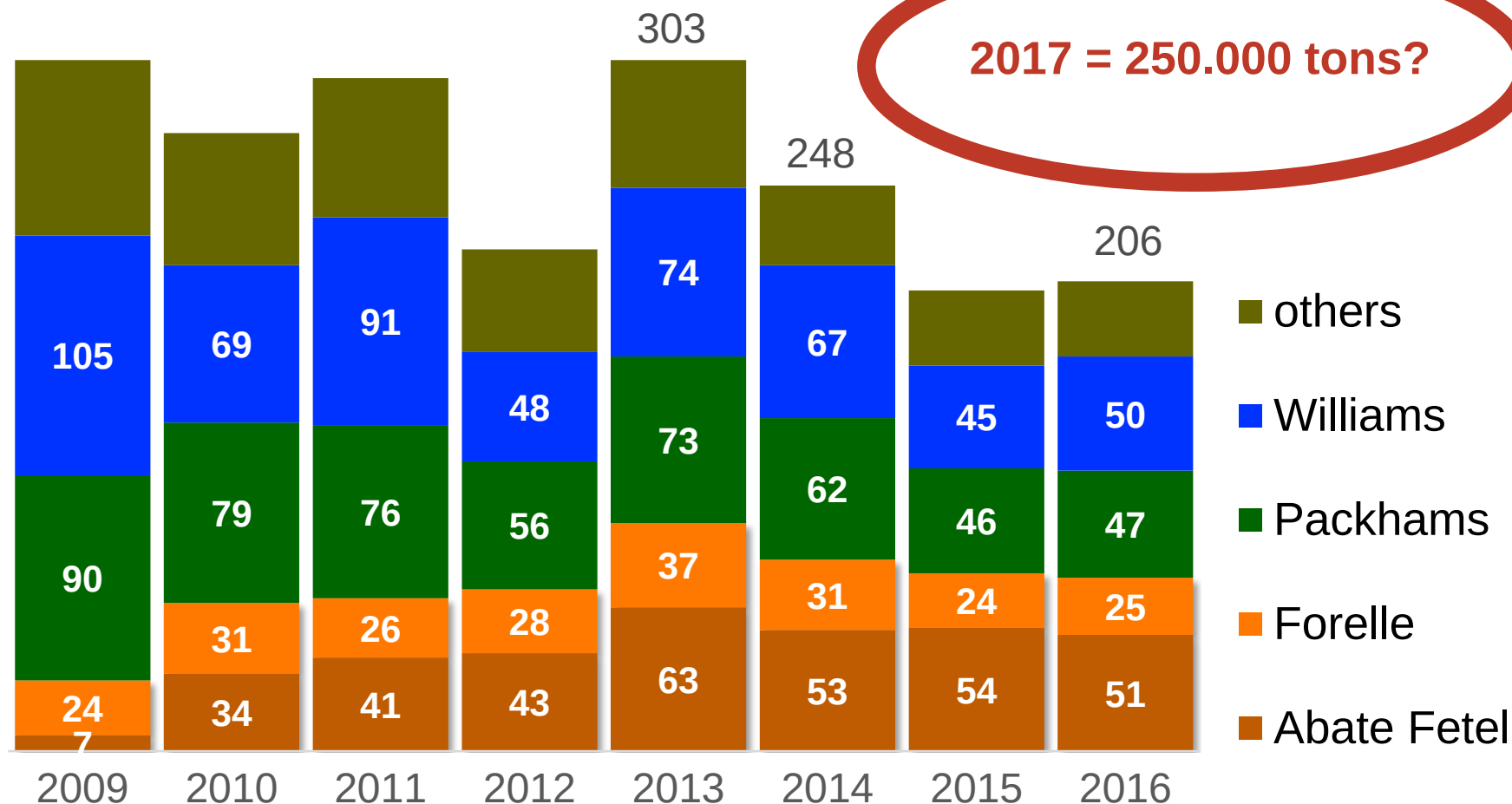


Import markets for pears in the world,
trading Southern Hemisphere, till July
(1.000 tons) 2016 (red graphic column), 2015 and 2014

Less imports from Southern Hemisphere



EU – Pear imports from Southern Hemisphere, in 1.000 tons



Source: AMI

Prospect for 2016/17

- EU crop 2016 clearly lower than 2015, only Netherlands with normal volume
- Better qualities, stretching the season
- Export in markets outside Europe still expanding
- Spain market once again in focus

Positive outlook 2016/17

Thanks a lot for your attention.

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