



Philippe Binard
World Apple and
Pear Association
(WAPA)

European apple crop outlook 2017

*“a review of 2016 season
and outlook 2017”*



Opening remarks

We care about:

- ✓ Improving methodology and information
- ✓ Cooperating closely with those close to growing: team work
- ✓ Be reliable, transparent and validate the work a posteriori
- ✓ Look beyond the EU and get a global outreach
- ✓ Prognos = starting point and data are updated
- ✓ During the year work continue with the stocks



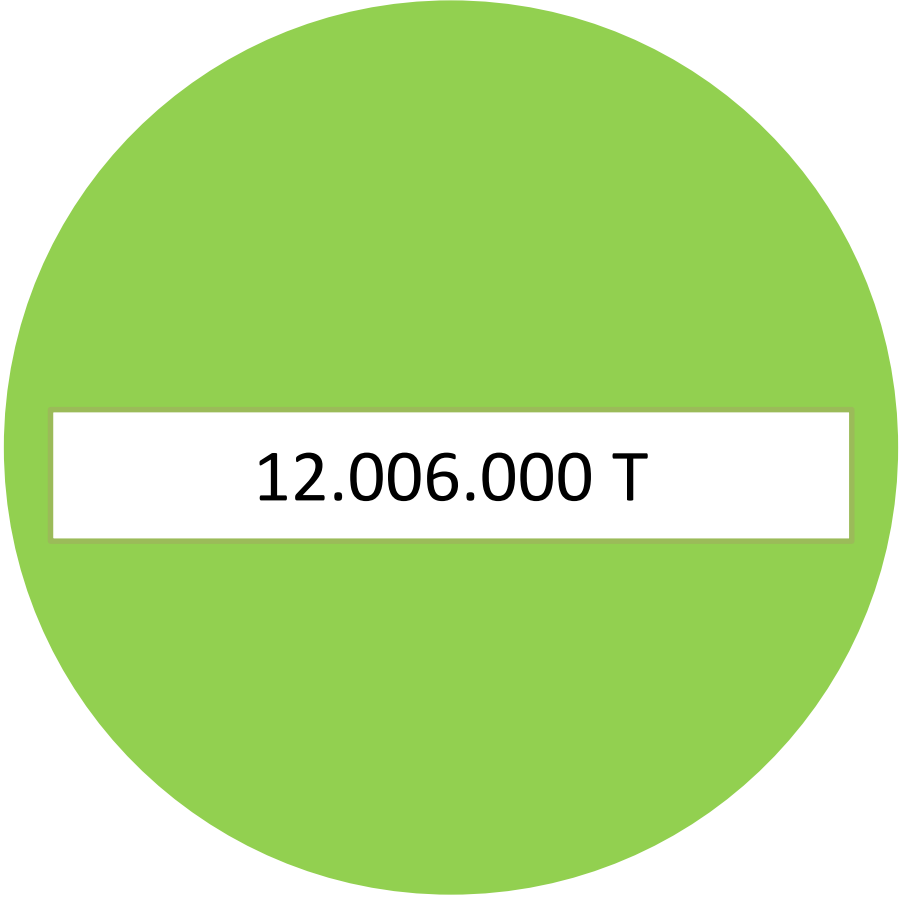


XLII Prognosfruit

Lleida, 9-11 August 2017

2016 forecast

2016 EU apple crop forecast



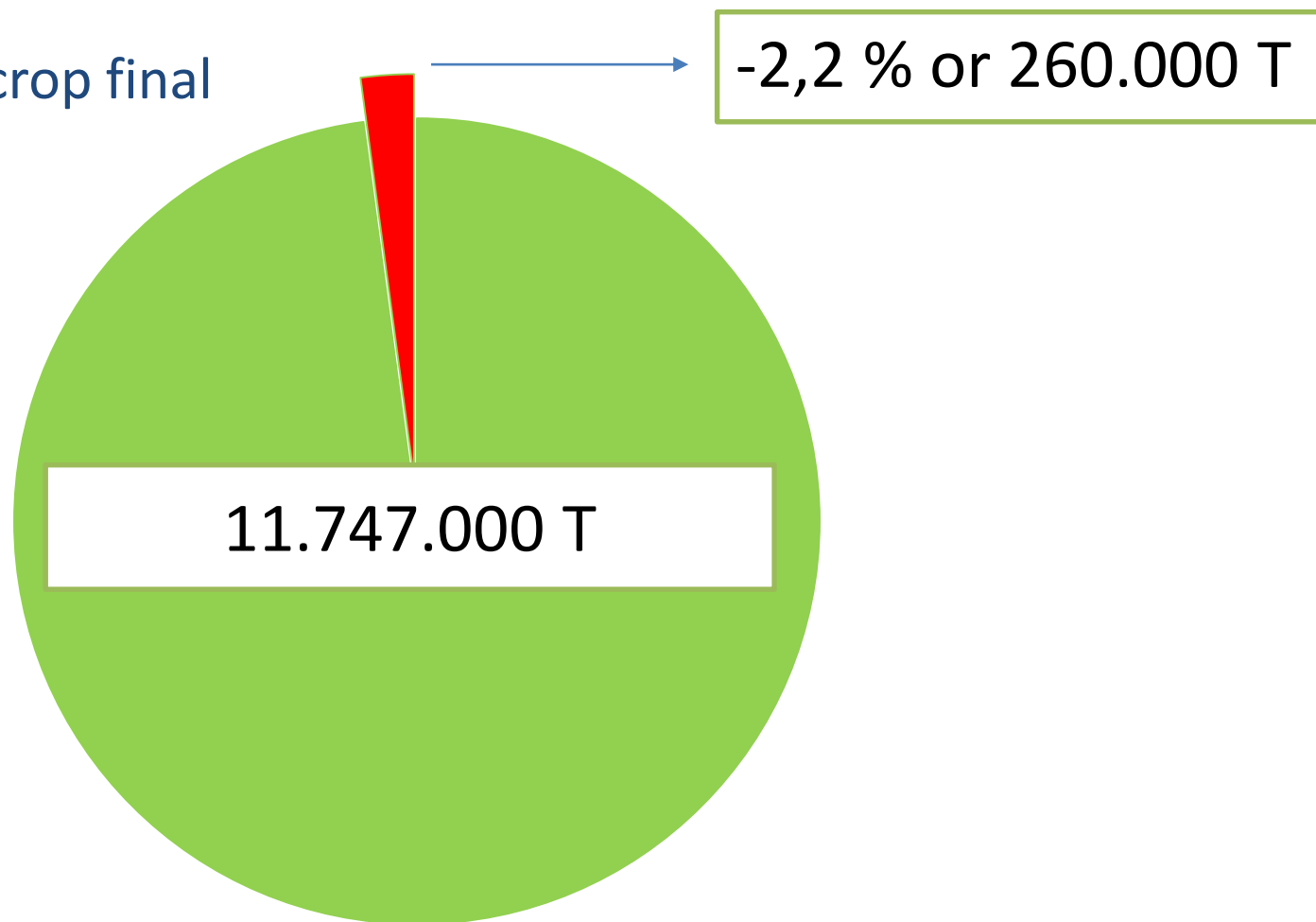
12.006.000 T



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Lleida, 9-11 August 2017

2016 final

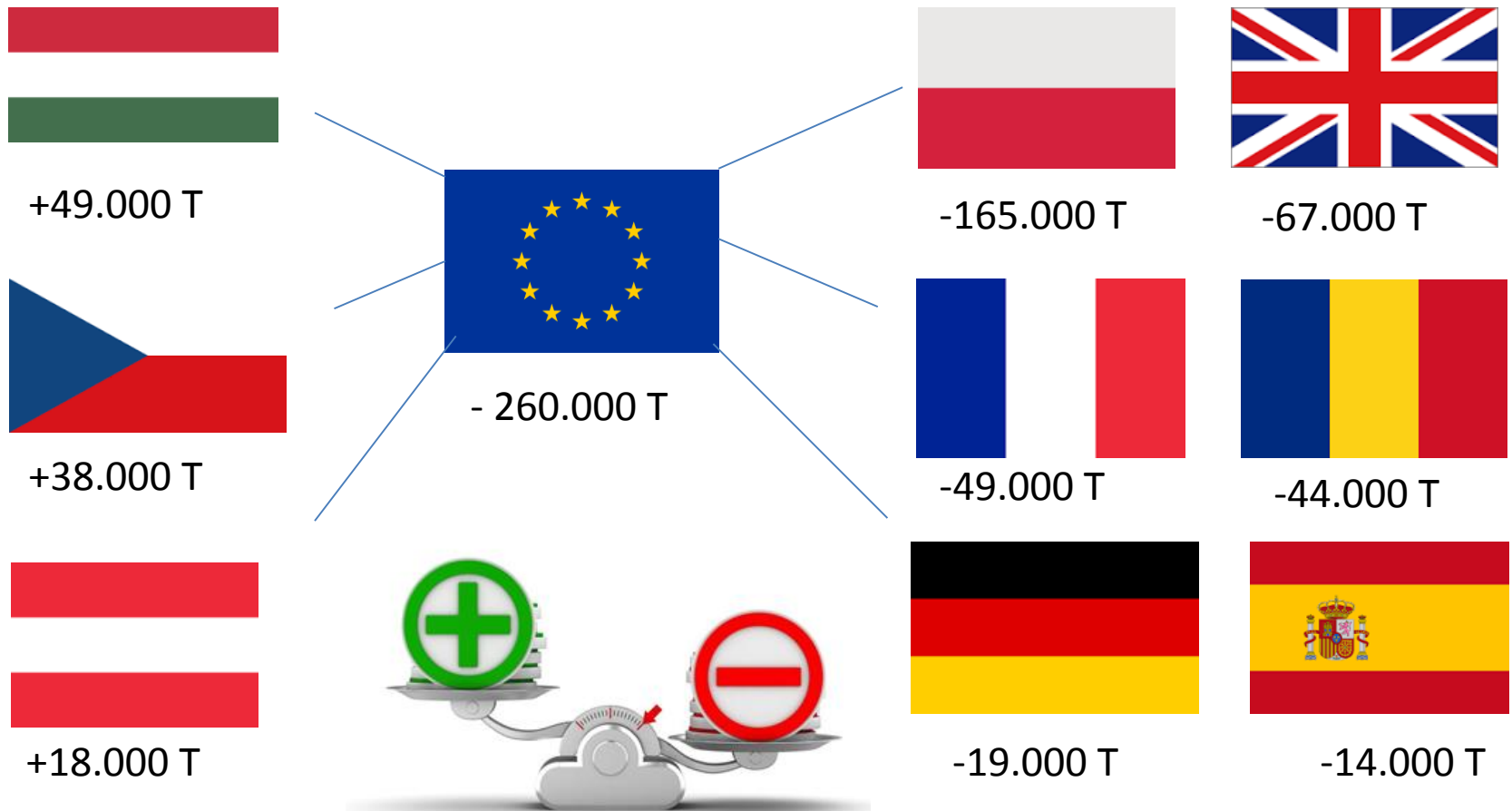
2016 EU apple crop final



2016: forecast v. final



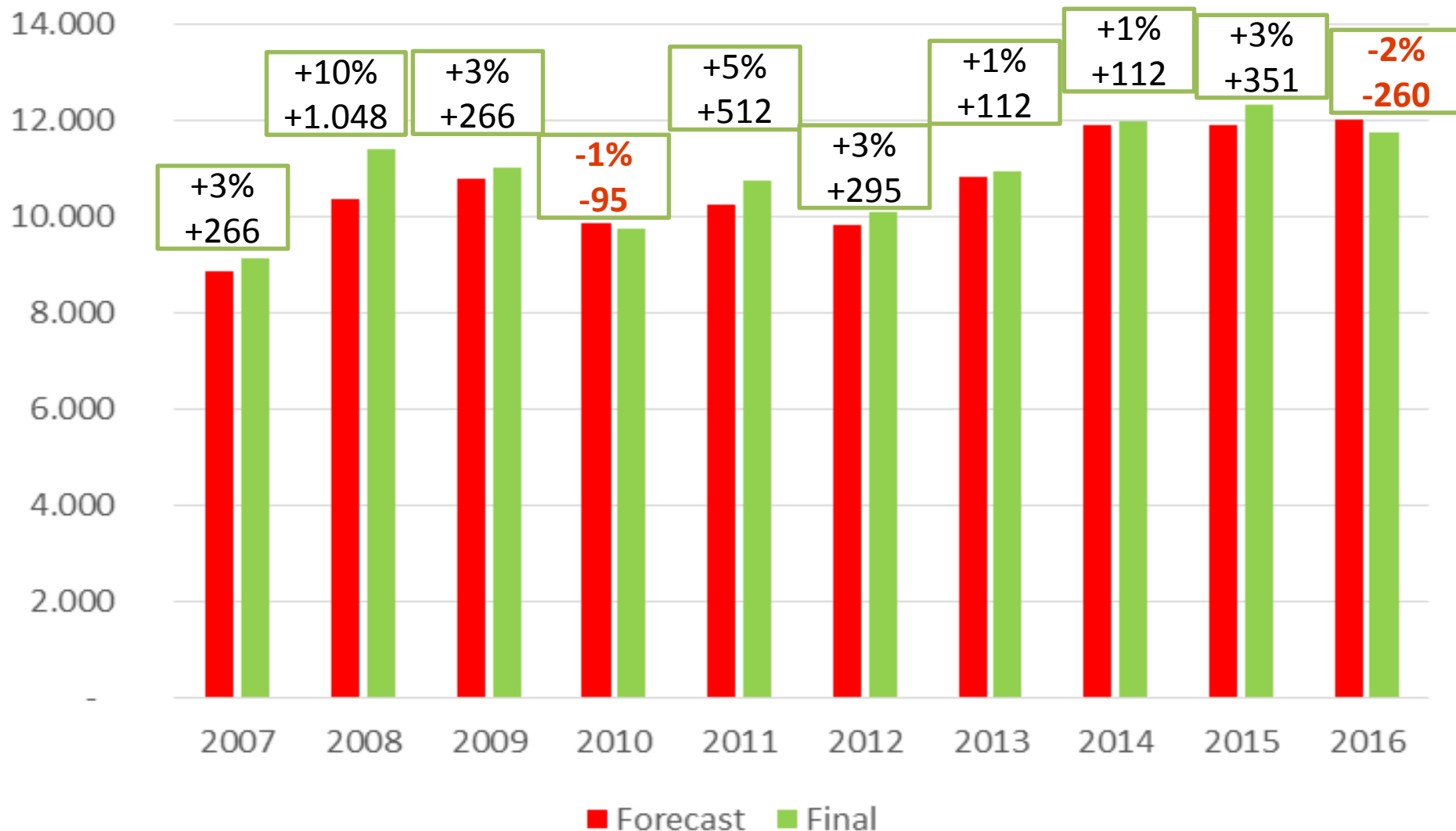
XLII Prognosfruit
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2016: forecast v. final



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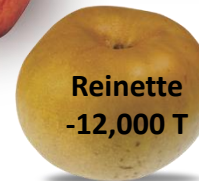


Forecast and actual results 2016 (per varieties in %)



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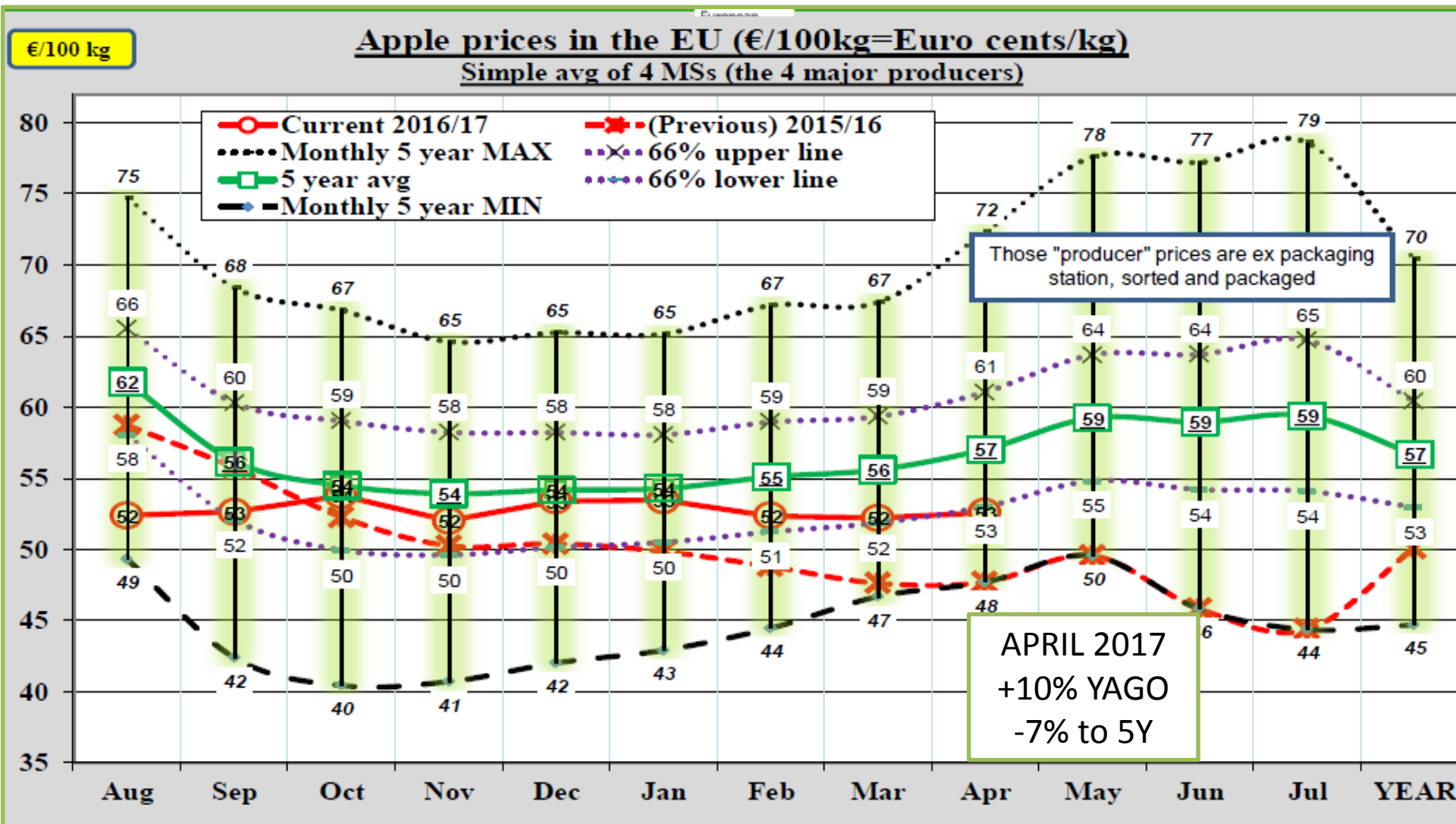
Lleida, 9-11 August 2017



Prices trends



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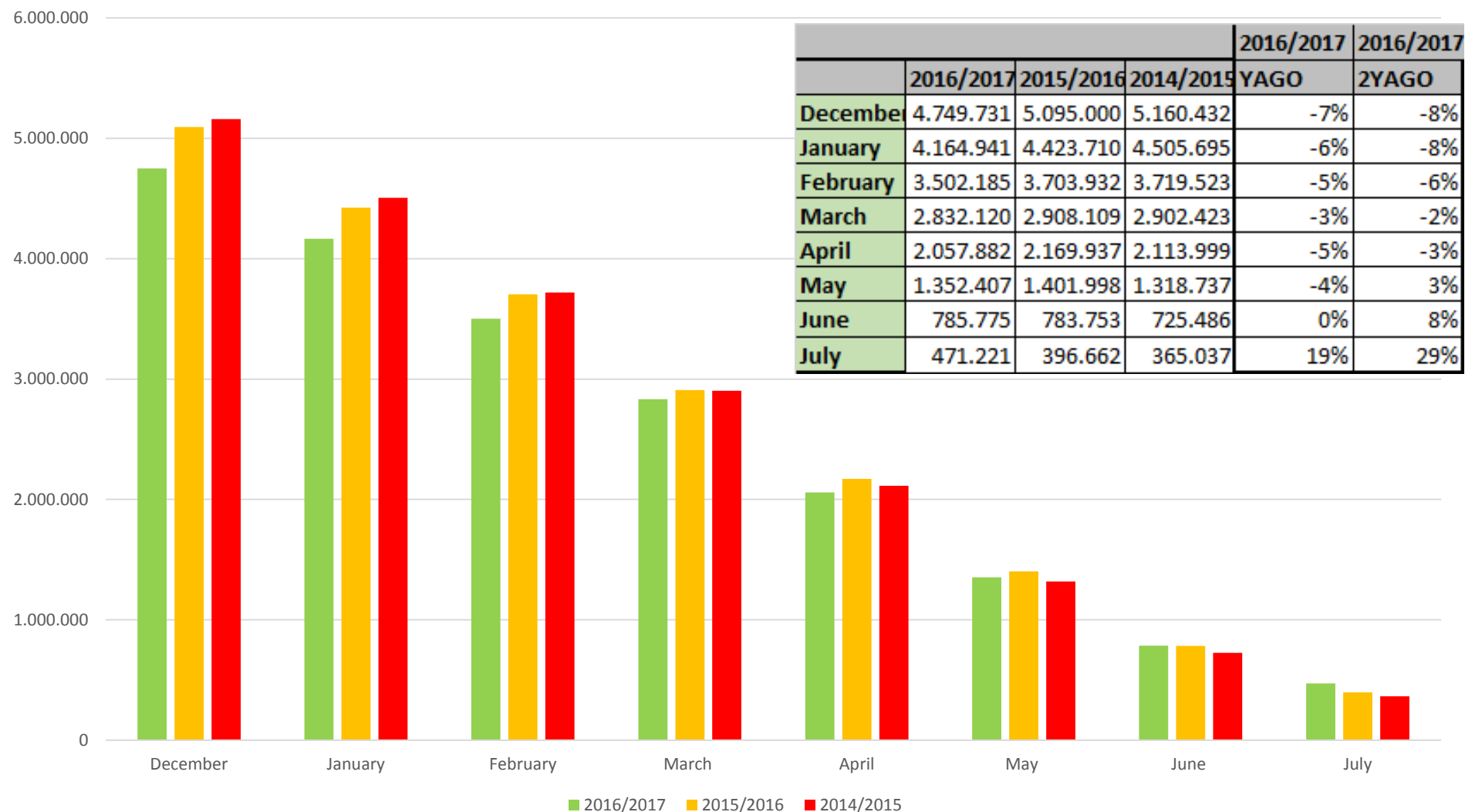


Stocks depletion



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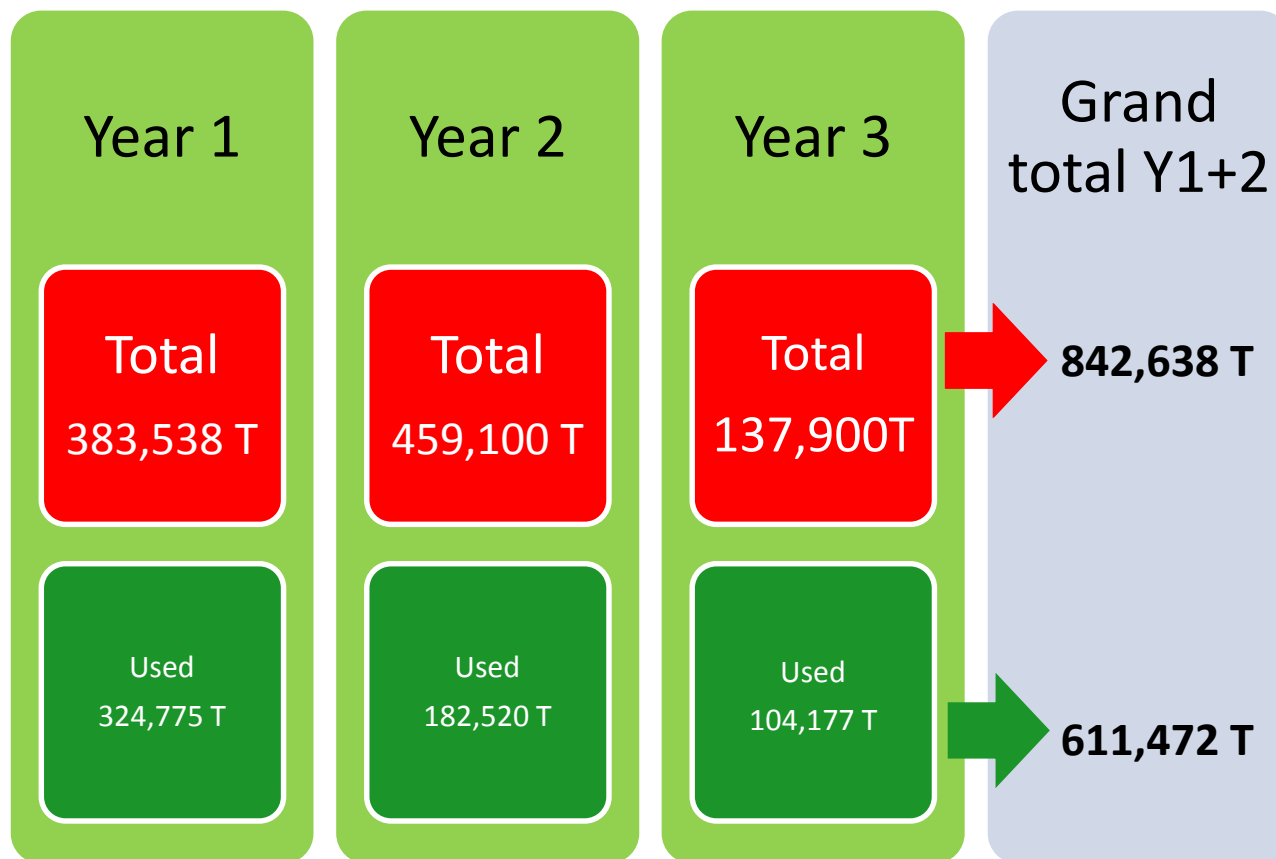


EU exports to RU
pre-embargo:
Apples: 800.000 T
Pears: 200.000 T

Russian embargo



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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

YEAR 4: volume apples and pears 117,045 (Reg 2017/1165)

Apples trade Internal + Export trends



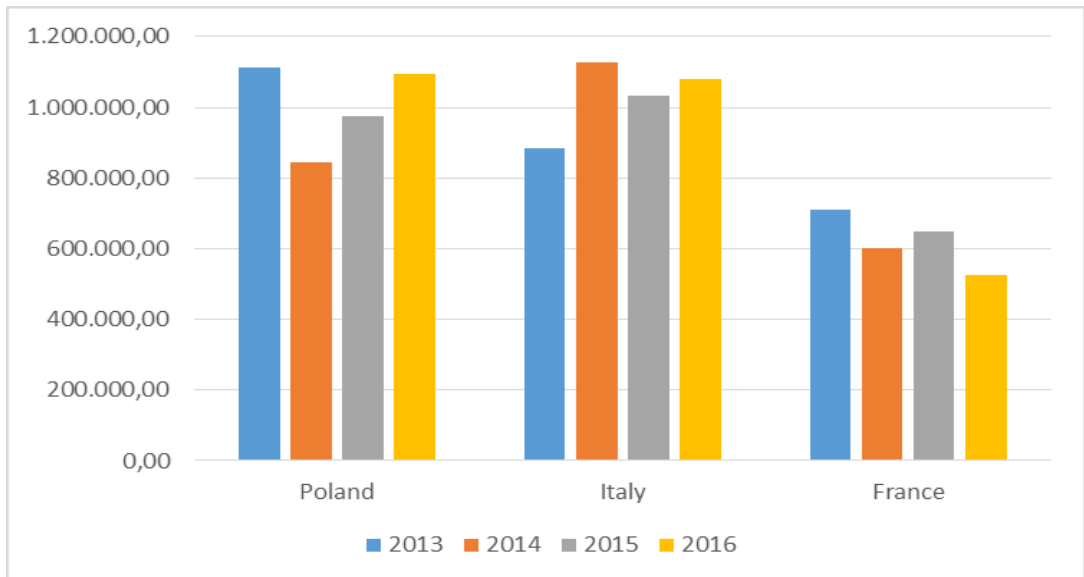
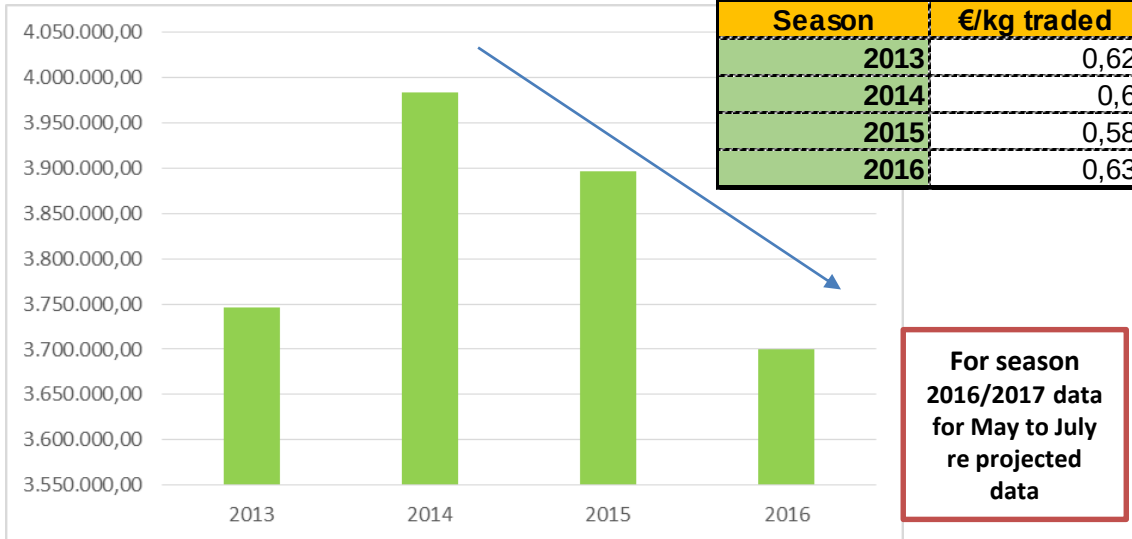
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	2013/2014	2016/2017	
Total	3.746.486	3.699.957	-1%
Poland	1.112.837	1.094.886	-2%
Italy	885.217	1.078.800	22%
France	711.976	526.341	-26%
Belgium	180.441	209.665	16%
Netherlands	188.838	179.581	-5%
Spain	131.608	133.504	1%
Greece	67.263	88.916	32%
Germany	60.070	83.330	39%
Austria	79.807	59.075	-26%
Czech Rep	56.730	51.111	-10%
Lithuania	69.903	39.831	-43%
Portugal	29.763	37.540	26%
Slovenia	38.523	31.164	-19%
Croatia	18.680	19.860	6%
Hungary	35.871	15.421	-57%
UK	17.686	12.257	-31%
Latvia	8.295	10.519	27%
Slovakia	21.178	8.229	-61%
Romania	18.966	6.611	-65%

Value trade in apples:

Turnover 2,24 bio € in season 2015/2016 to 2,33 bio € in season 2016/2017 (projected from April onwards)



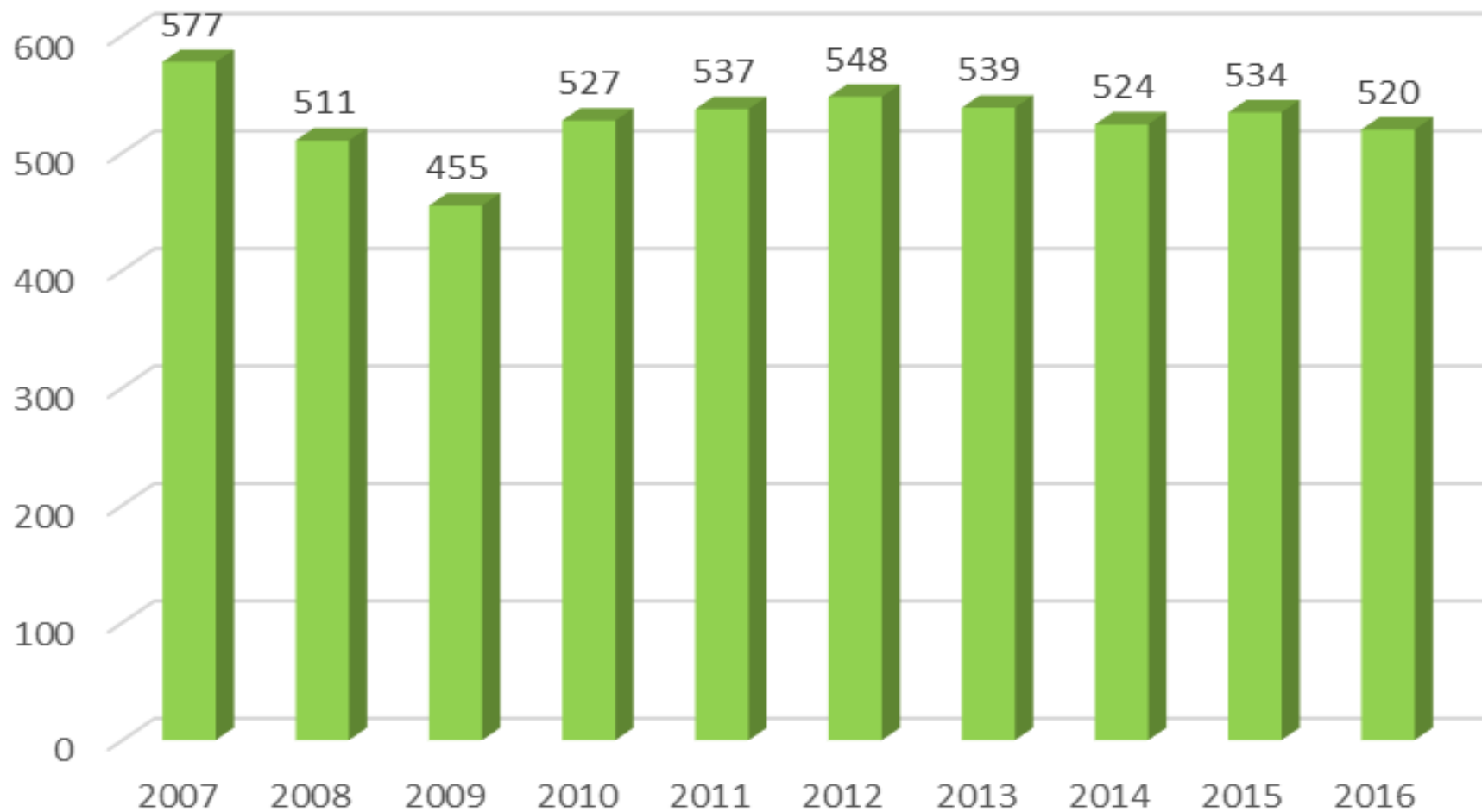
Apple orchard review



Ha Apple total EU



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Area of apple production (000 HA)



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Lleida, 9-11 August 2017

000 HA	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Poland	176	172	174	170	184	195	162	163	180	165
Romania	59	55	53	56	53	55	60	56	56	56
Italy	61	59	59	54	54	54	53	52	52	53
France	53	52		40	42	41	53	50	50	50
Hungary	43	43	42	34	33	32	33	33	30	33
Germany	32	32	32	32	32	32	32	31	31	32
Spain	36			32	32	31	31	31	31	31
United Kingdom	15			14	16	16	20	16	16	16
Portugal	15	14	13	13	11	13	14	14	14	14
Greece	12	12	14	14	13	12	13	12	12	11
Lithuania	13	10	10	10	10	12	12	11	11	10
Czech Rep	10	10	10	9	9	9	9	9	8	7
Netherlands	9	9	9	9	8	8	8	8	8	7
Austria	6	6	6	6	6	6	7	7	7	7
Belgium	8	8	8	8	8	7	7	7	7	6
Croatia	6	6	7	7	7	6	6	6	5	6
Bulgaria	5	5	5	5	5	5	5	4	4	4
Latvia	5	5	4	3	3	3	3	3	2	2
Slovenia	3	3	3	3	3	3	3	3	2	2
Slovakia	3	3	3	2	2	3	4	3	2	2
Sweden	1	1	1	1	1	1	1	1	1	2
Denmark				2	2	1	1	1	1	1
Ireland		1	1	1	1	1	1	1	1	1
Finland	1	1	1	1	1	1	1	1	1	1
Estonia	1	1	1	1	1	1	1	1	1	1
Cyprus	1	1	1	1	1	1	1	1	1	0
Luxembourg	0	0	0	0	0	0	0	0	0	0
Malta	0	0	0	0	0	0	0	0	0	0
TOTAL	577	511	455	527	537	548	539	524	534	520

PL > 166.000 HA

RO, IT, FR: 50-55.000 HA

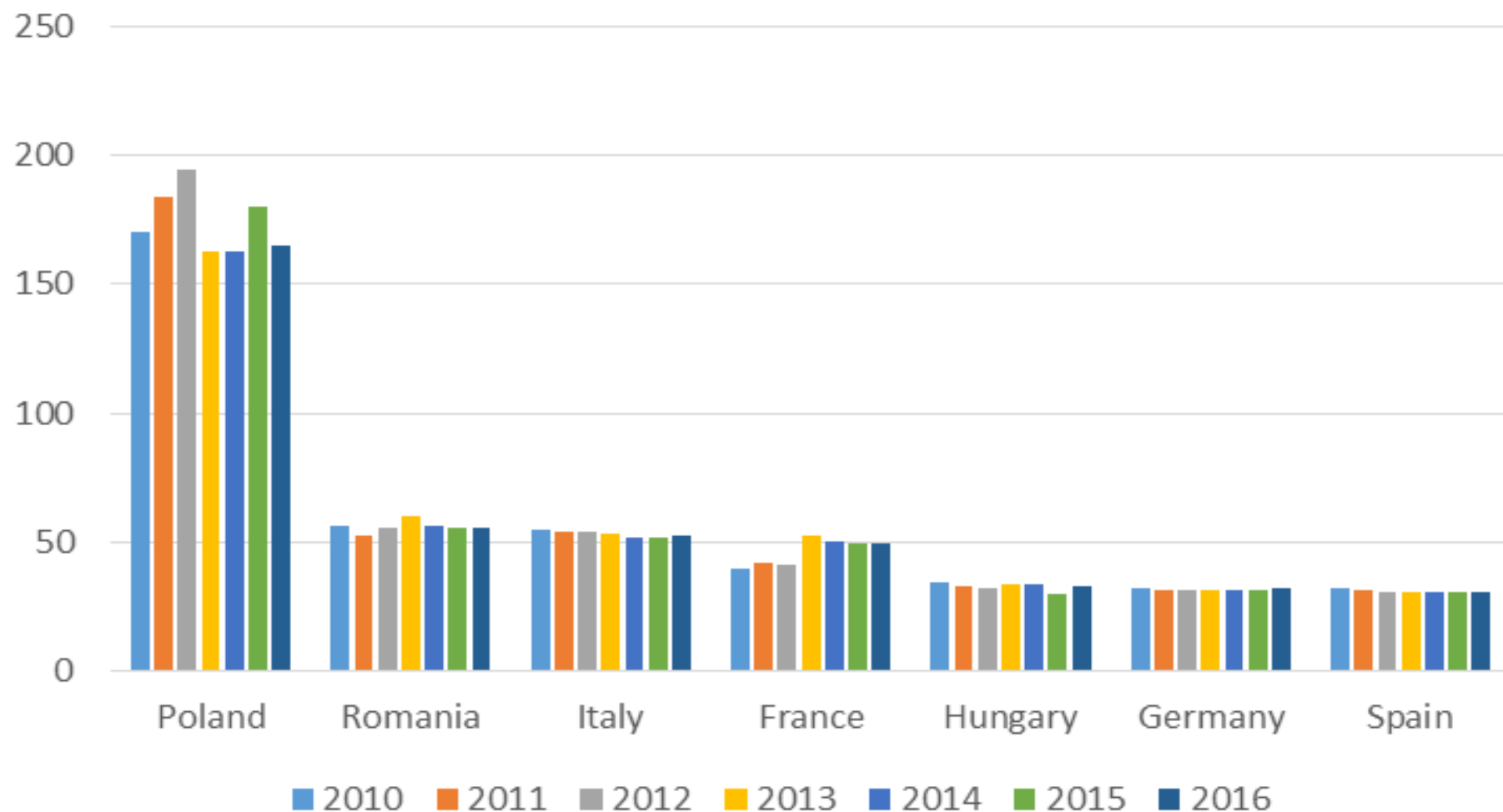
HU, DE, ES: 30-35.000 HA

UK, PT, GR, LT: 10-15.000 HA

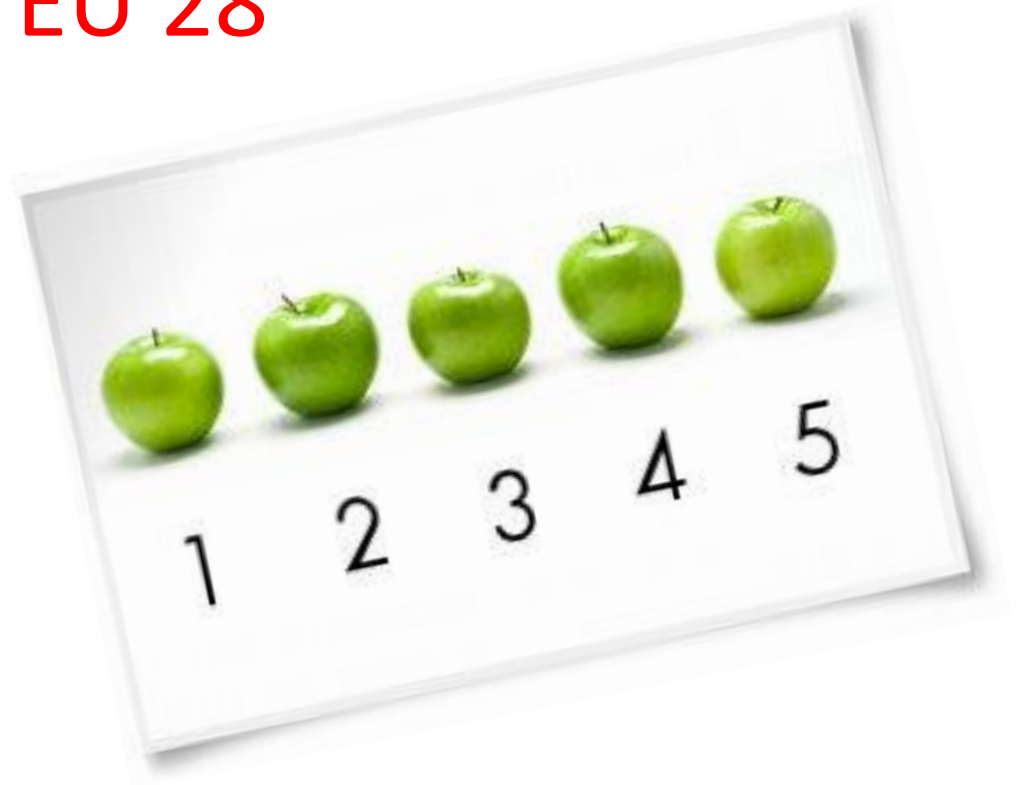
Ha Apple (trends selected MS)



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APPLES forecast 2017: quantitative approach EU 28

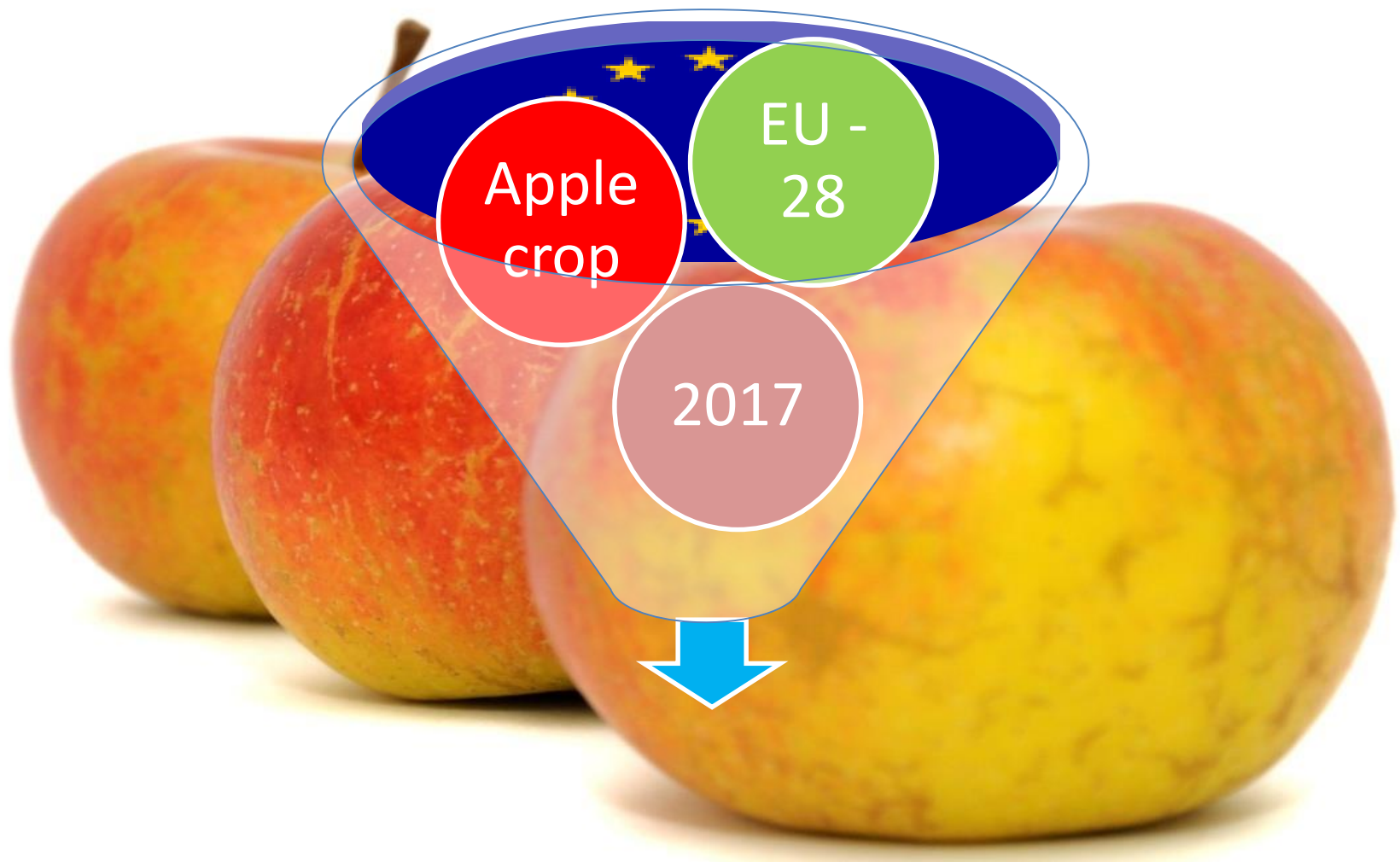


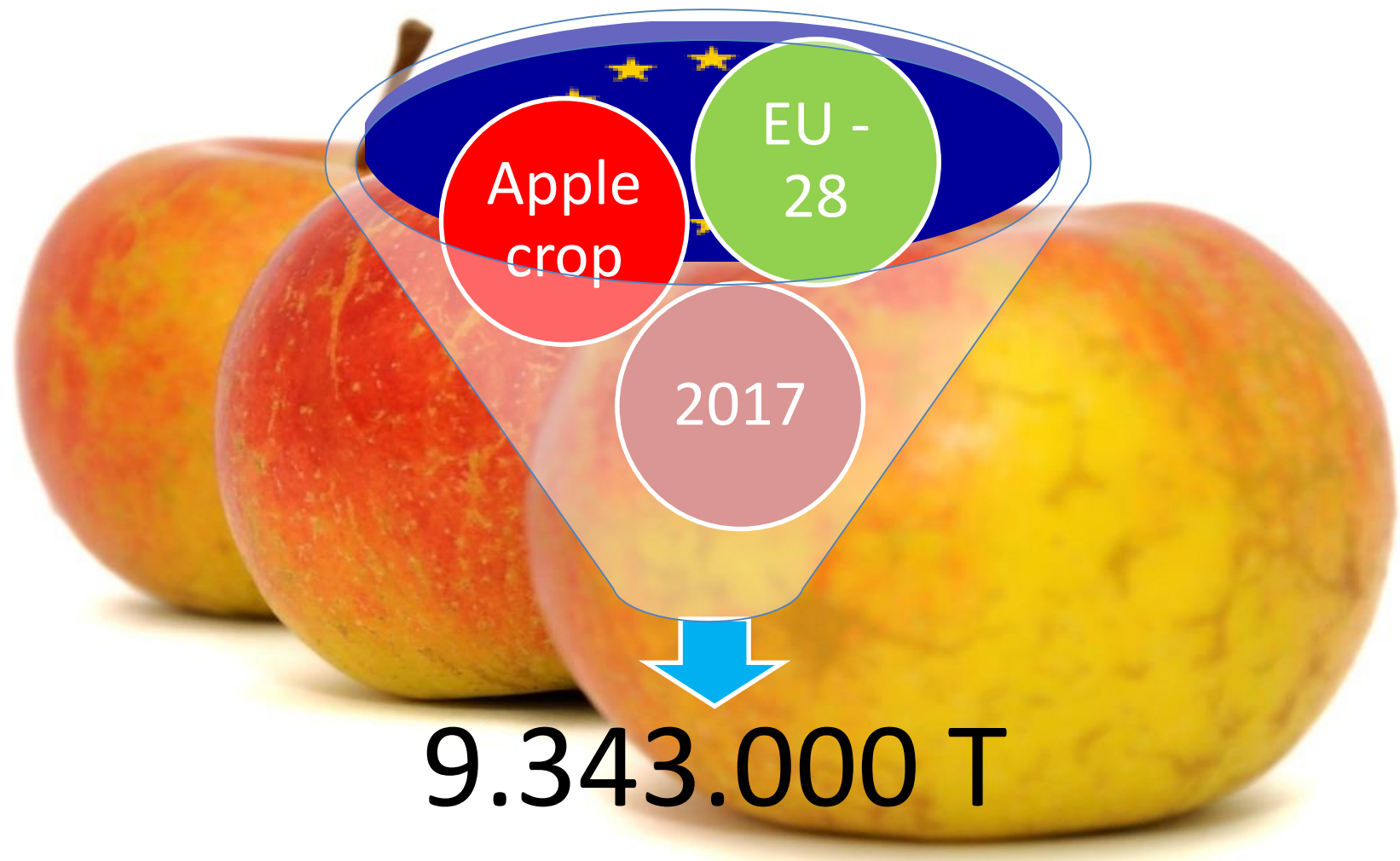


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Unpredictable









(12.006.000 T YAGO – 11.791.000 T final)

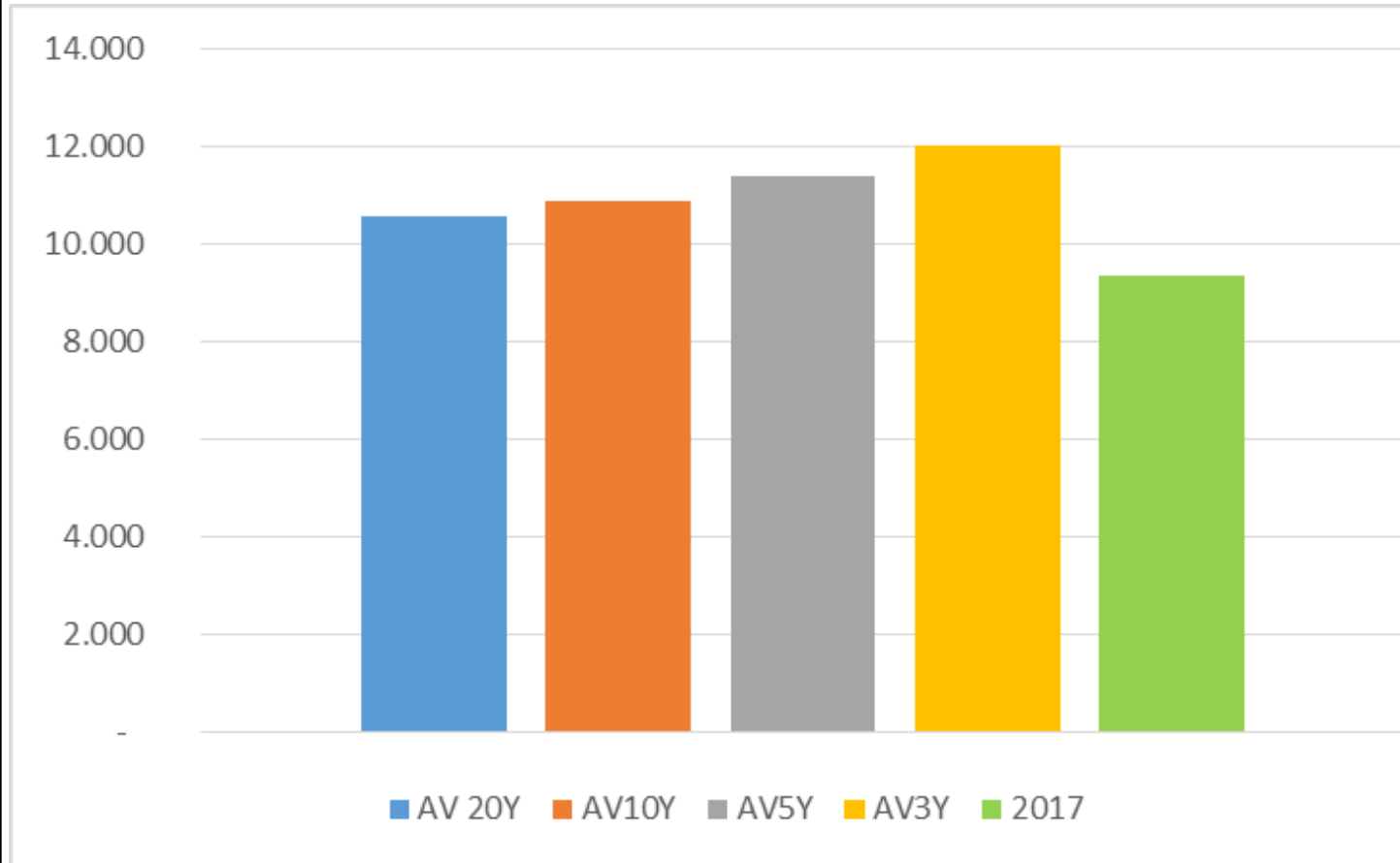
and also historically low
looking further behind



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Lleida, 9-11 August 2017

YEAR	CROP
2015	12.325
2014	11.974
2016	11.747
2008	11.395
2000	11.082
2001	11.052
2009	11.008
2013	10.929
2011	10.746
1999	10.694
2003	10.500
2002	10.266
2004	10.231
2012	10.095
2005	9.840
2010	9.740
2017	9.343
2007	9.131
2006	8.786

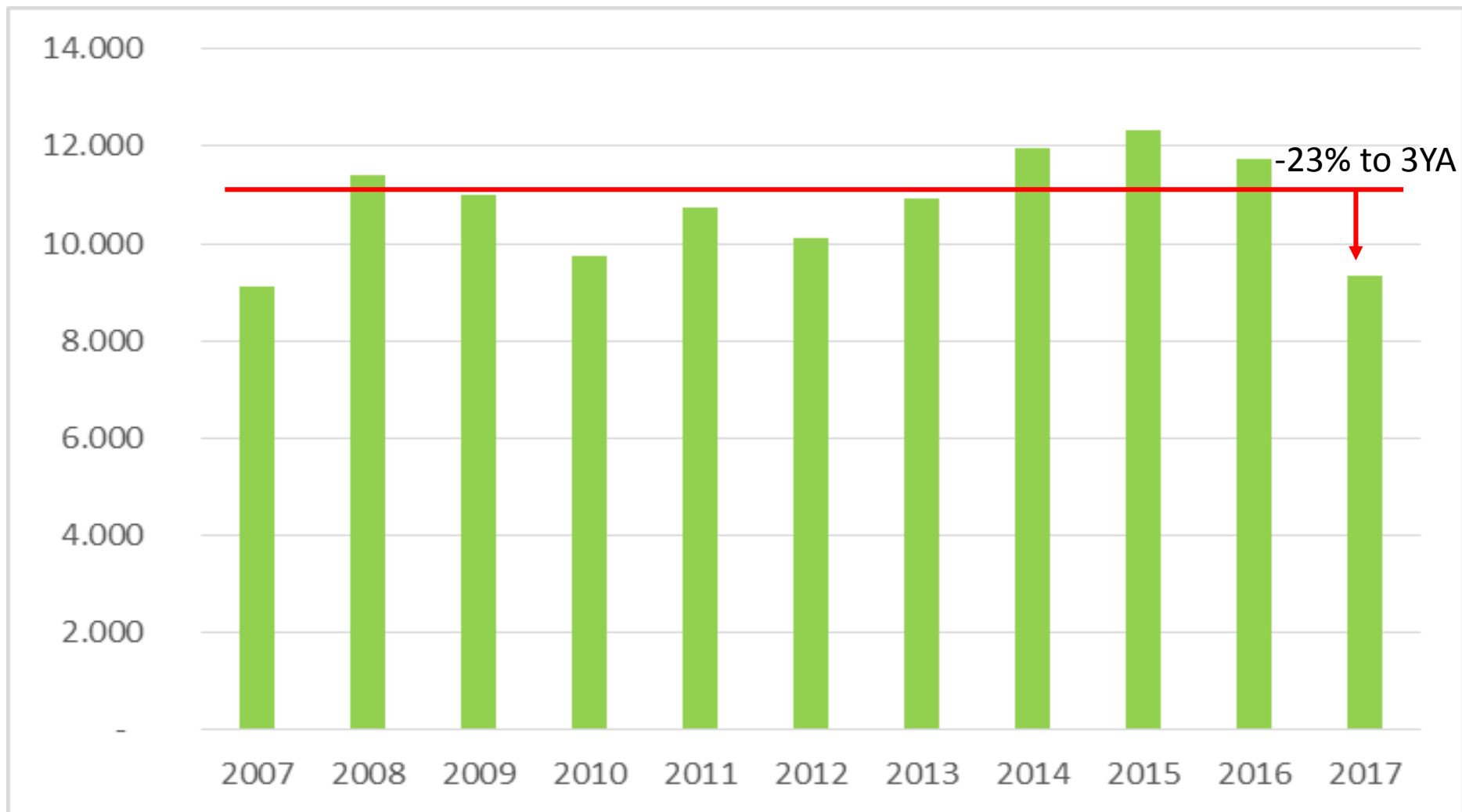


EU-28 crop 2016 in 10 Y perspective



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Lleida, 9-11 August 2017



Country	2008	2009	2010	2011	2012	2013	2014	2015	2016	F2017	(1)	(2)
Austria	159	185	169	199	157	155	188	177	40	67	68	-50
Belgium	336	344	288	305	220	220	318	285	234	74	-68	-73
Croatia	49	60	89	83	59	96	62	101	35	66	89	0
Czech Rep	157	145	103	79	118	121	131	156	139	108	-22	-24
Denmark	26	24	21	20	18	23	26	24	24	19	-21	-23
France	1.621	1.651	1.519	1.101	1.189	1.576	1.444	1.177	1.115	1.396	-8	-10
Germany	1.047	1.071	835	953	972	804	1.116	973	1.033	555	-46	-47
Greece	231	224	254	285	242	236	245	242	255	232	-15	-17
Hungary	583	514	488	301	750	585	920	522	498	628	26	-3
Italy	2.165	2.237	2.179	2.293	1.939	2.122	2.456	2.280	2.275	1.557	-23	-25
Latvia	34	13	12	8	9	15	10	8	10	5	-50	-46
Lithuania	74	74	46	49	39	40	27	46	29	44	-12	7
Netherlands	376	372	334	18	281	291	353	336	317	234	-26	-30
Poland	3.200	2.600	1.850	2.500	2.900	3.170	3.750	3.979	4.035	2.870	-29	-17
Portugal	248	274	251	265	221	284	272	329	293	314	19	9
Romania	329	379	423	412	351	387	382	336	327	309	-6	-11
Slovakia	15	48	32	33	36	42	46	40	37	35	-12	-10
Slovenia	68	64	66	73	45	56	68	71	12	6	-50	-88
Spain	528	510	486	507	391	464	505	482	495	474	-4	-4
Sweden	18	18	20	17	14	17	16	21	20	18	-10	-5
UK	201	212	214	226	162	204	175	183	183	137	-25	-24
Total:	11.395	11.008	9.740	10.746	10.095	10.929	12.510	12.265	11.779	9.343	-21	-23

“Recovery”
crop

- Austria (+68%)
 - Croatia (+89%)
 - Hungary (+26%)
 - Slovakia (+82%)
- Large crop
- Portugal (+19%)

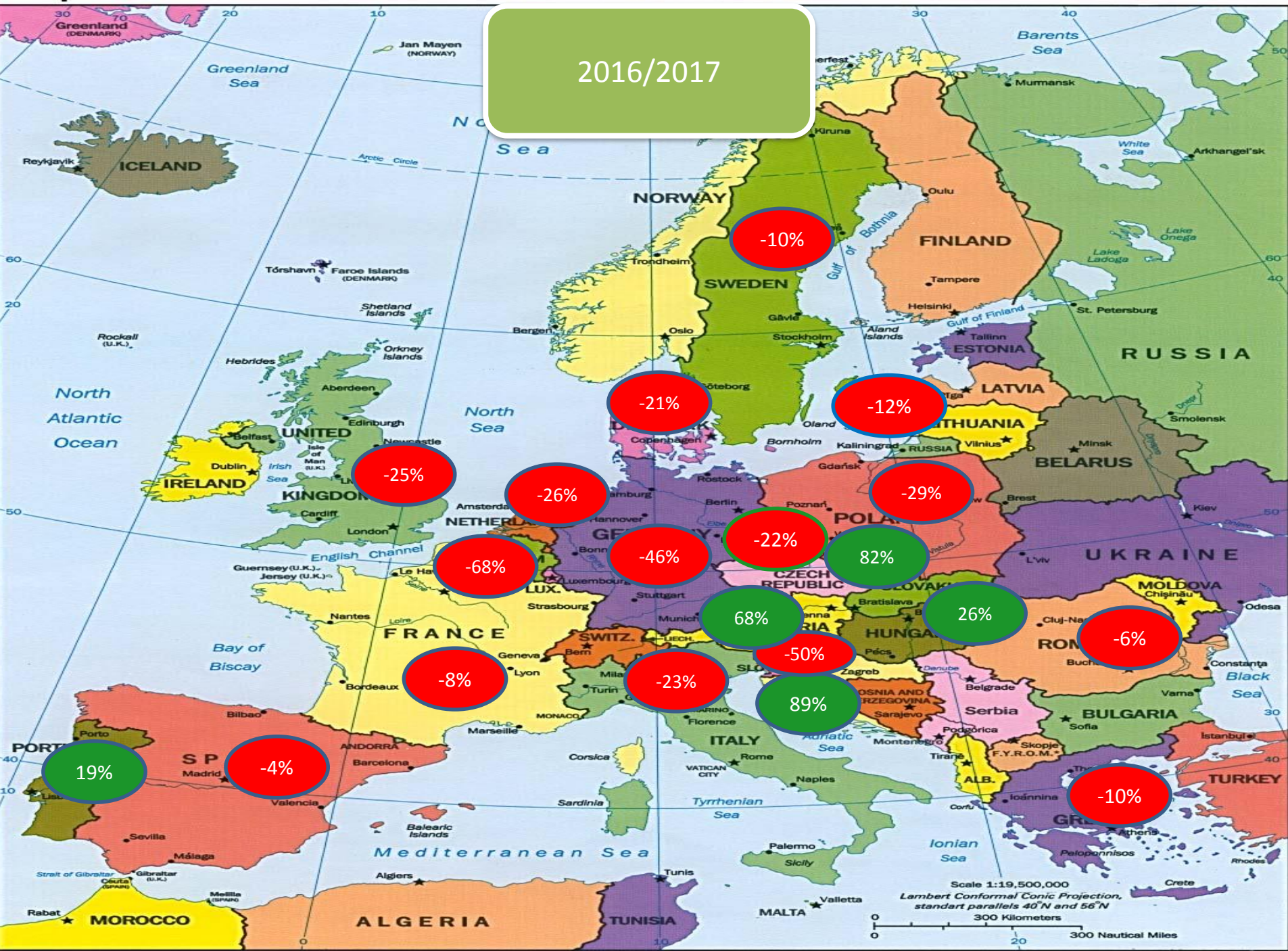
Medium low crop

- Spain (-4%)
- Romania (-6%)
- France (-8%)

Low crop

- 9 MS with their lowest decade crop
- Belgium (-46%)
- Italy (-23%)
- Poland (-29%)
- Slovenia (-50%)

Europe

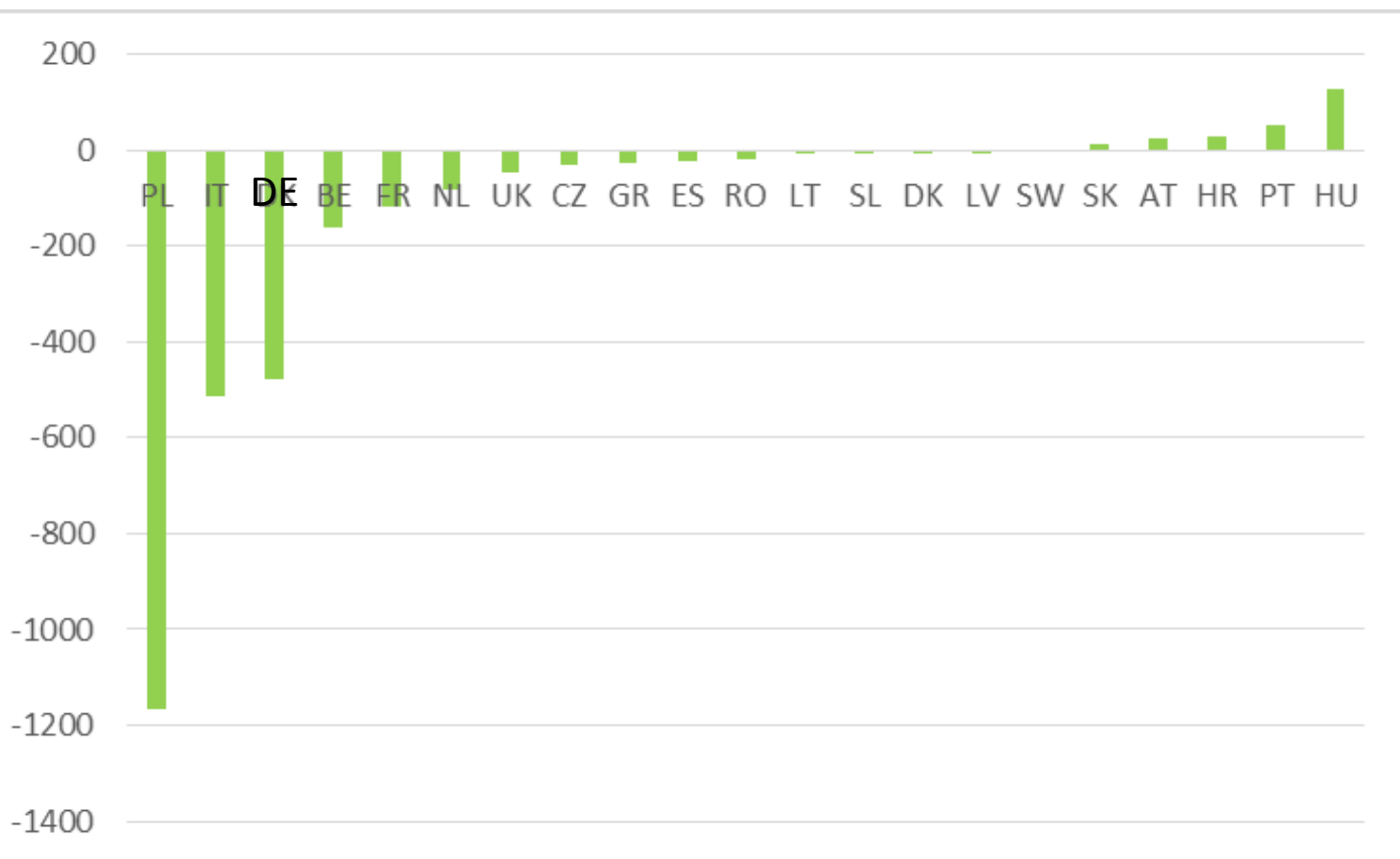


Main variation in 000 T to last season by MS



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in 000 T	2016	2017	DIFF
PL	4035	2870	-1165
IT	2272	1757	-515
DE	1033	555	-478
BE	234	74	-160
FR	1515	1396	-119
NL	317	234	-83
UK	183	137	-46
CZ	139	108	-31
GR	259	232	-27
ES	495	474	-21
RO	327	309	-18
LT	50	44	-6
SL	12	6	-6
DK	24	19	-5
LV	10	5	-5
SW	20	18	-2
SK	17	31	14
AT	40	67	27
HR	35	66	31
PT	263	314	51
HU	498	628	130

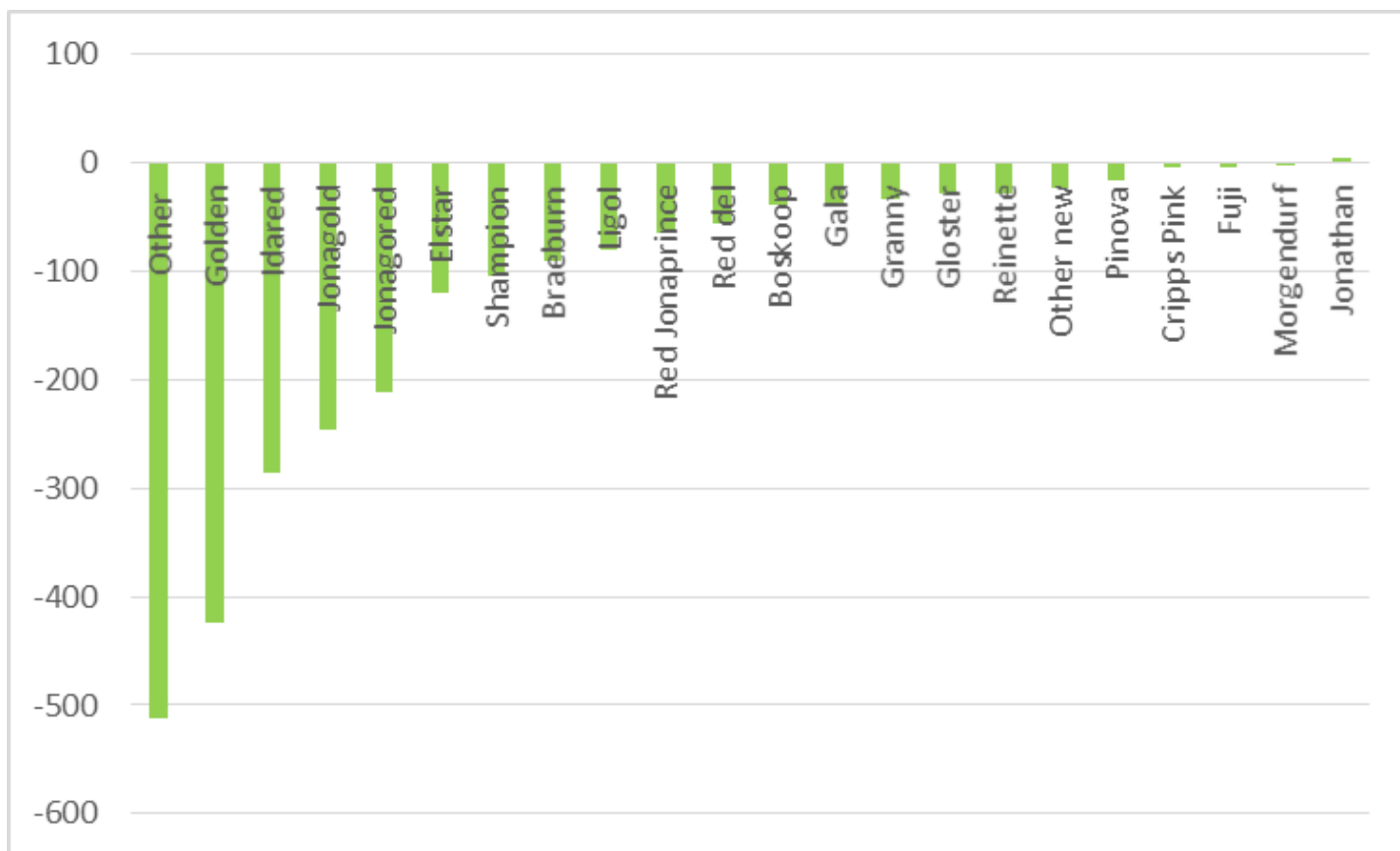


Main variation in 000 T to last season by varieties



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in 000 T	2016	2017	DIFF
Other	1815	1302	-513
Golden	2406	1982	-424
Idared	965	679	-286
Jonagold	567	320	-247
Jonagored	539	328	-211
Elstar	387	267	-120
Shampion	522	418	-104
Braeburn	320	229	-91
Ligol	330	250	-80
Red Jonaprince	156	91	-65
Red del	632	576	-56
Boskoop	71	33	-38
Gala	1314	1276	-38
Granny	384	351	-33
Gloster	197	169	-28
Reinette	108	80	-28
Other new	157	133	-24
Pinova	80	63	-17
Cripps Pink	261	256	-5
Fuji	288	283	-5
Morgendurf	49	46	-3
Jonathan	123	127	4

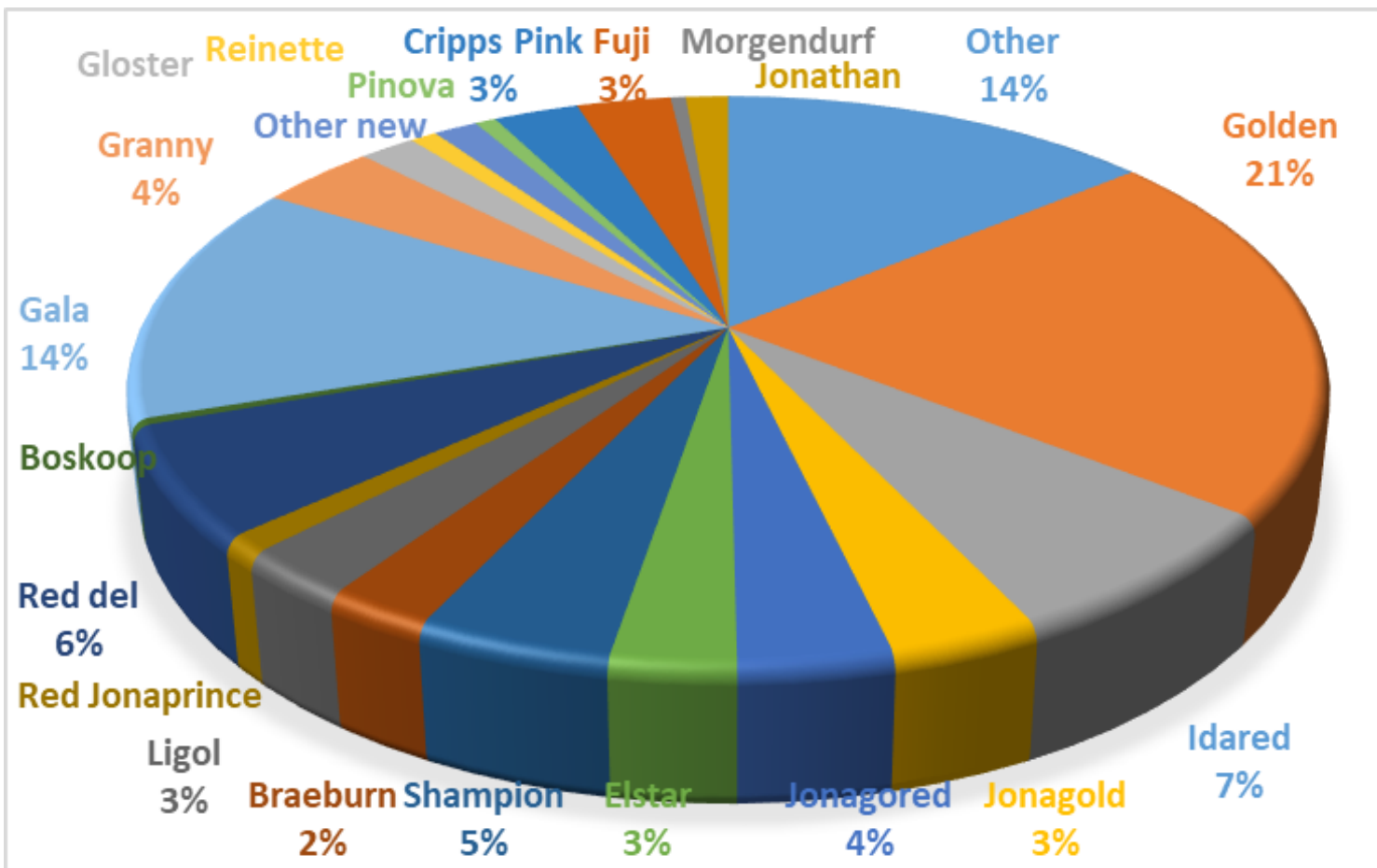


Ranking varieties in %

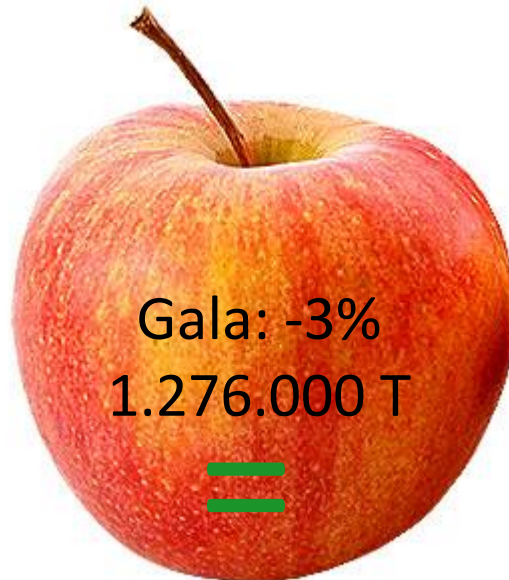


XLII Prognosfruit

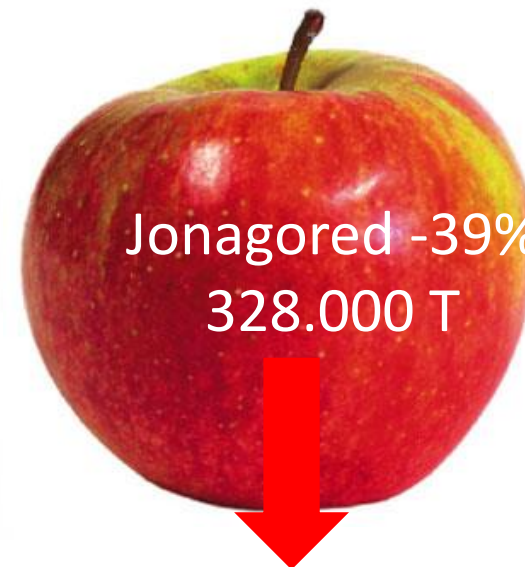
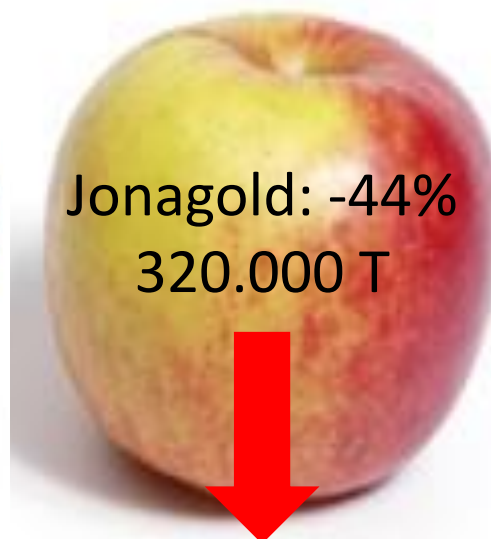
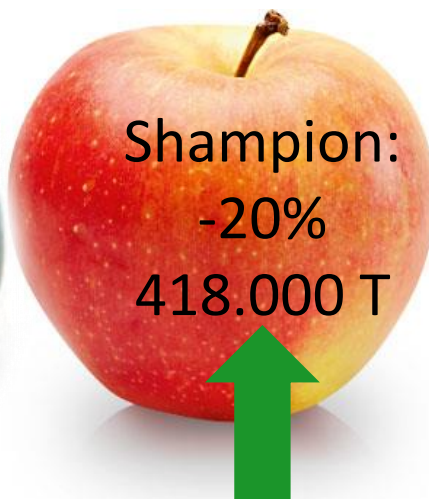
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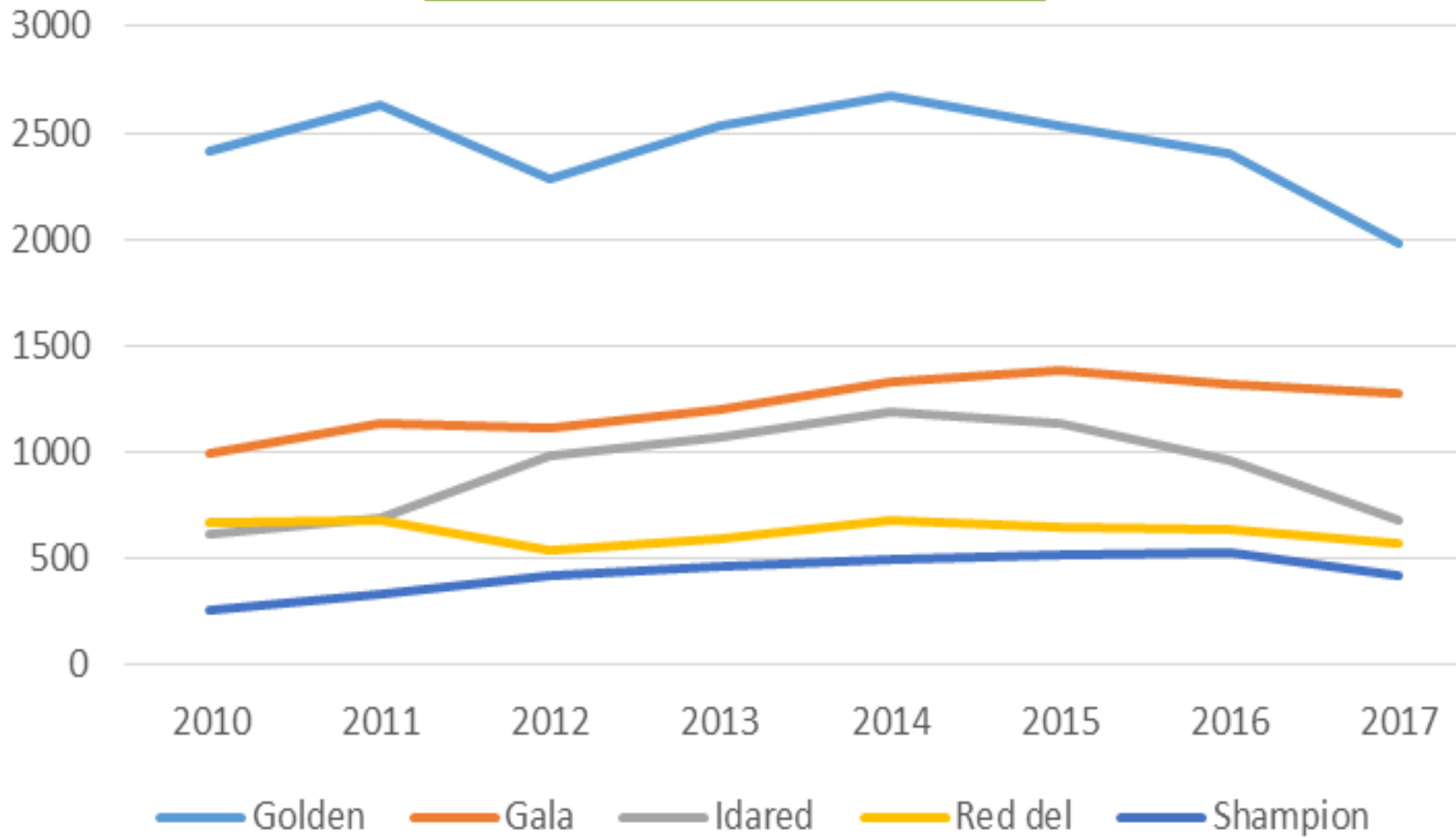
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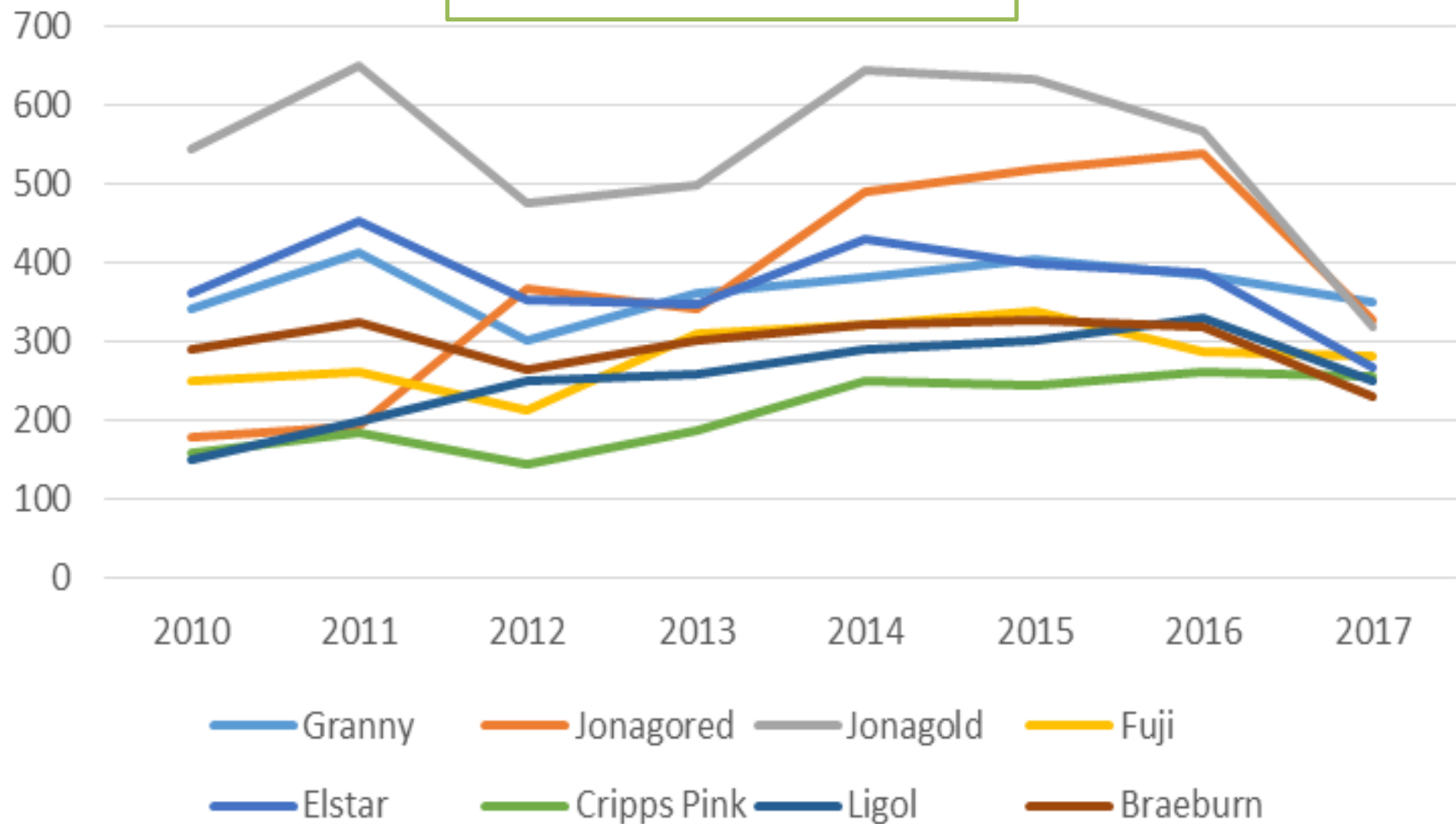
Leading varieties



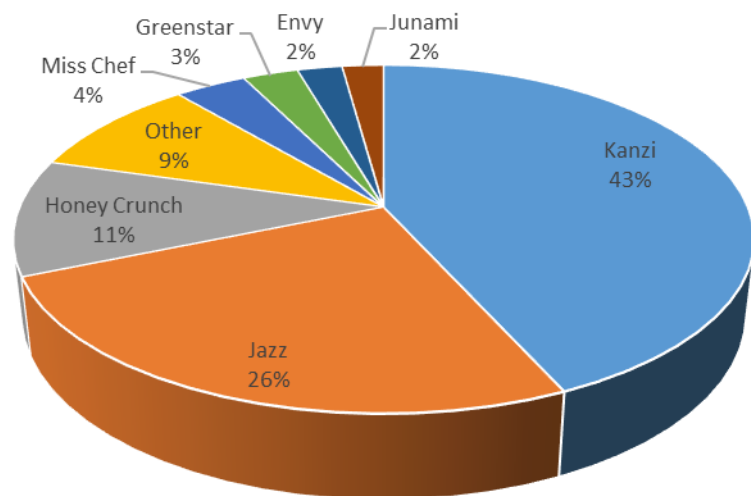
TOP 5 VARIETIES TRENDS



OTHER MAIN VARIETIES
300.000 TO 400.000 T



OTHER NEW VARIETIES & CRIPPS PINK CLUB VARIETIES TRENDS



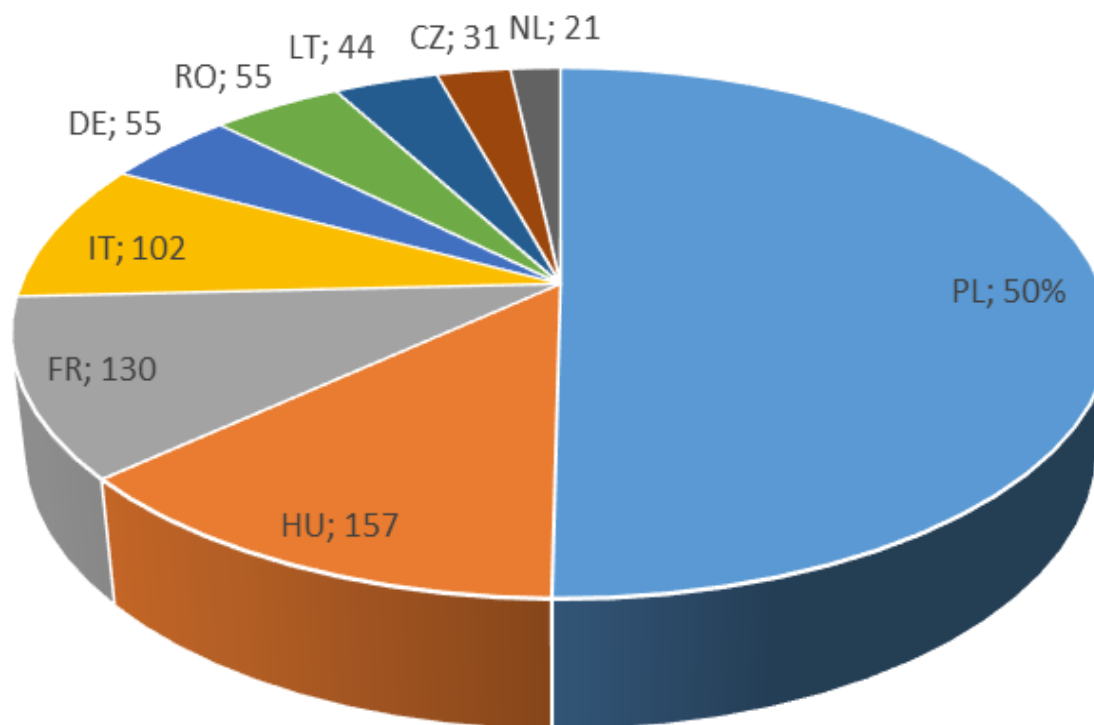
	2016	2017	2020	Trends
Kanzi	65.000	60.000	100.000	54%
Greenstar	7.000	4.000	8.000	14%
Junami	2.000	1.400	25.000	1150%
Jazz	31.850	35.300	41.000	29%
Envy	1.620	3.250	11.000	579%
Miss Chef	5.400	5.200	7.000	30%
Honey Crunch	15.000	15.000	20.000	33%
Juliet	8.500	8.500	14.000	65%
Cripps Pink	261.000	256.000		
out of which Pink Lady	172.000	178.000	210.000	22%
	66%	69%		

OTHER VARIETIES



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Other Varieties	2017
PL	600
HU	157
FR	130
IT	102
DE	55
RO	55
LT	44
CZ	31
NL	21



Organic apples



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Lleida, 9-11 August 2017



	2016 CROP	% ORGANIC	ORGANIC CROP	CROP 2017	% ORGANIC	ORGANIC CROP
AT	40.000	0,15	6.000	67.000	0,15	10.050
DE	1.033.000	0,07	72.310	555.000	0,08	44.400
FR	1.515.000	0,05	75.750	1.396.000	0,05	69.800
RO	327.000	0,05	16.350	309.000	0,05	15.450
IT	2.272.000	0,04	90.880	1.757.000	0,04	70.280
NL	317.000	0,04	12.680	234.000	0,04	9.360
UK	183.000	0,04	7.320	137.000	0,04	5.480
SLO	12.000	0,03	360	6.000	0,03	180
BE	234.000	0,02	4.680	74.000	0,02	1.480
CZ	139.000	0,02	2.780	108.000	0,02	2.160
GR	259.000	0,01	2.590	232.000	0,01	2.320
HR	35.000	0,01	350	66.000	0,01	660
			292.050			231.620

Apples processing 2017



Fresh market supply balance

SUPPLY BALANCE	2015	2016	2017
PRODUCTION	12 265	11 779	9 343
PROCESSING	3 820	3 536	3 102
FRESH	8 445	8 243	6 241
RATIO FRESH	69%	70%	67%
RATIO PROCESSING	31%	30%	33%

Volume for apples processing
in selected countries (covering > 90% EU crop)

Country	2015	2016	2017
PL	2 188	2 018	1 579
HU	355	324	440
FR	301	258	349
DE	263	258	139
IT	228	273	281
RO	91	88	96
UK	78	64	48
BE	108	94	22
EL	48	52	46
CZ	78	56	54
NL	34	32	23
HR	30	4	7
LT	7	15	15
SLO	11	2	3
TOTAL	3 820	3 536	3 102

2016 crop forecast – EU28



XLII Prognosfruit

Lleida, 9-11 August 2017

9.343.000 T (21 MS)

+ ca 64.600 T (remaining MS – Eurostat data)

Apple production in other Member States (based on EUROSTAT data)

x 1000 tons									
Country	2008	2009	2010	2011	2012	2013	2014	2015	2016
Bulgaria	23,5	35,5	43,2	40,4	30,9	55,0	54,5	58,4	44,8
Estonia	0,5	1,8			1,0	2,4	1,2	1,6	2,8
Ireland	15,6	1,8				15,2	19,6	18,8	21,8
Cyprus	6,5					5,3	4,9	4,9	3,6
Luxembourg	3,1					1,9	2,6	2,4	2,4
Finland	4,3	4,3			1,8	4,8	5,3	6,0	6,4

81.800 T
-21% for 2017
(?)

64.600 T

EU-28: 9.407.600 T

+ Switzerland: 108.000 T

APPLE forecast 2016

QUALITATIVE and country review



XLII Prognosfruit
Lleida, 9-11 August 2017



AREAS OF CONCERN - EXTREME WEATHER EVENTS

Based on weather data from 1 April until 27 May 2017



 Rain deficit  Cold spell  Hot and Dry

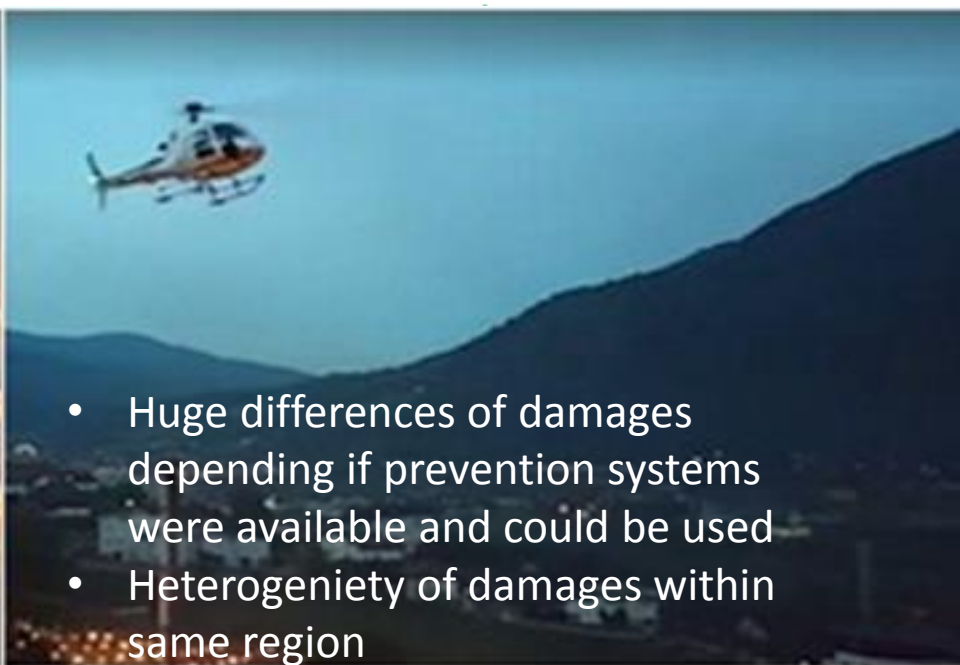


XLII Prognosfruit

Lleida, 9-11 August 2017

- Main features : overall a relatively mild winter in most of the growing area across the EU
- Abundant early blossoming
- Two important cold spells in the last 10 days of April and then around 8-10 May
- Very unusual situation of such a late frost with low temperature during several hours (-5°C to -8°C)
- Difficult to estimate qualitative damages





- Huge differences of damages depending if prevention systems were available and could be used
- Heterogeneity of damages within same region



- Differences inside the same country (North and South Germany, East and West of France , valleys in Italy)
- Grojec and Lublin in Poland; Belgium v. Holland

MINIMUM DAILY TEMPERATURE

Lowest values

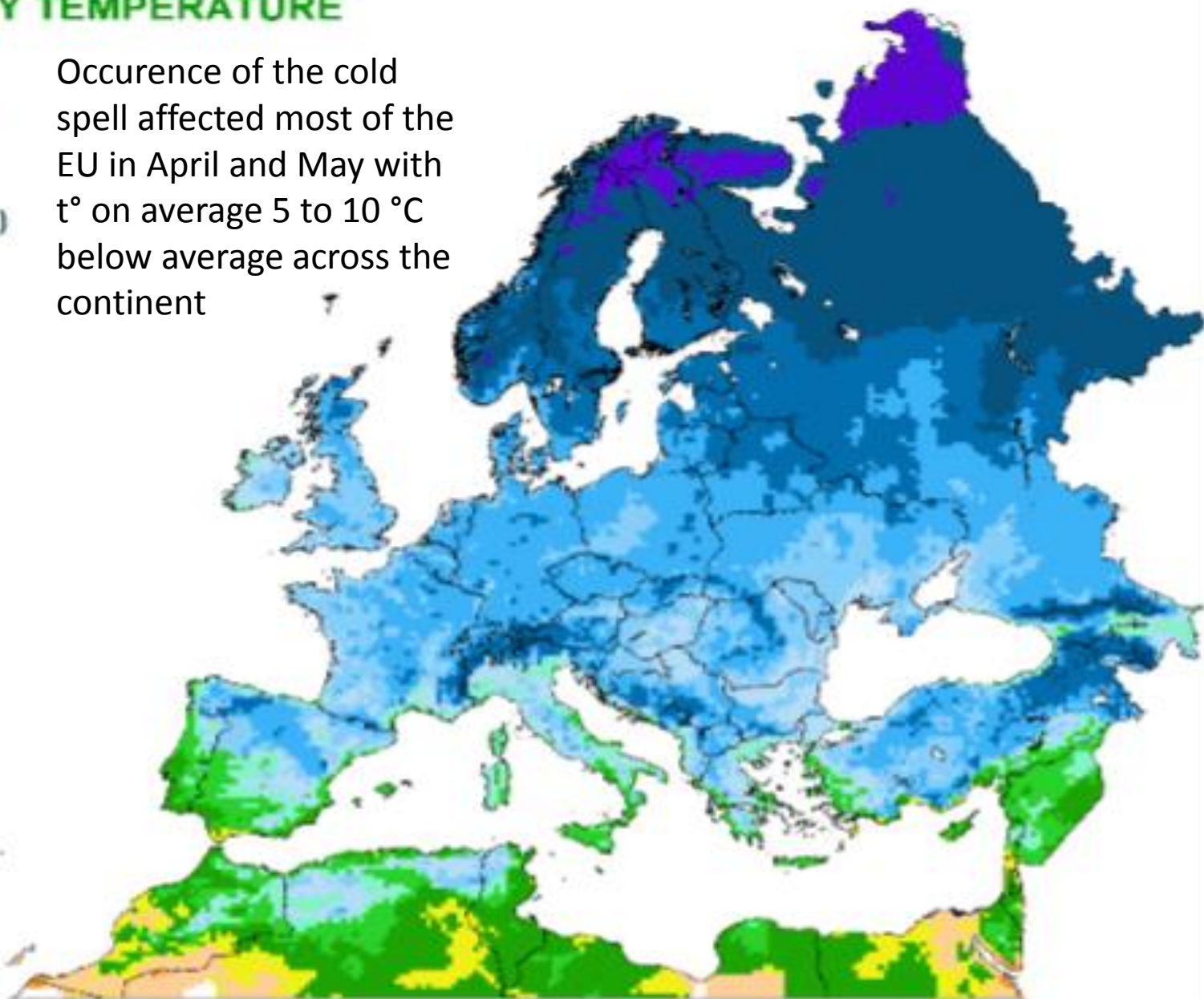
from : 01 April 2017

to : 15 May 2017

Year of interest (YOI)

Occurrence of the cold spell affected most of the EU in April and May with t° on average 5 to 10 $^\circ\text{C}$ below average across the continent

Unit: degrees Celsius



17/05/2017

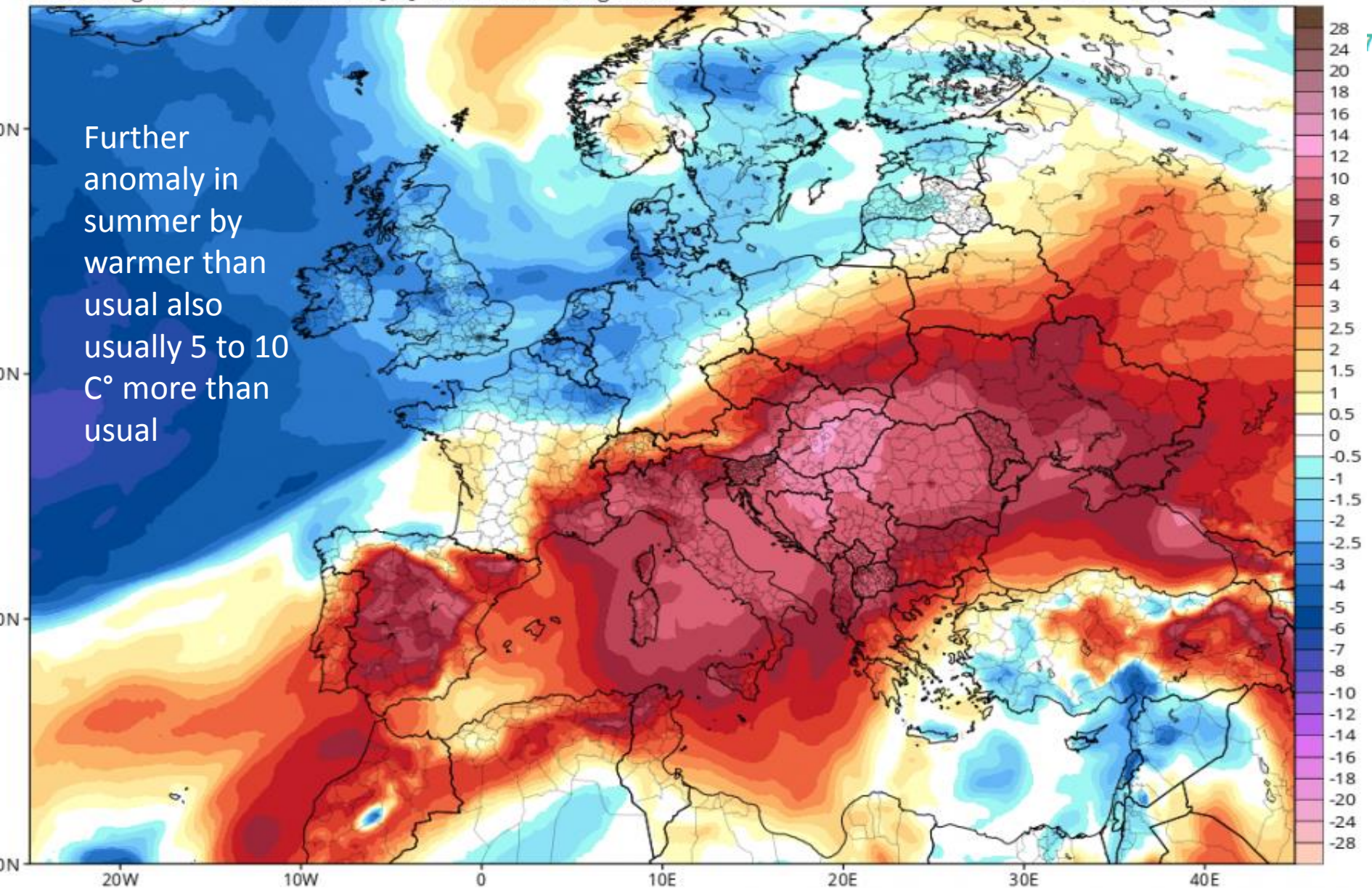
resolution: 25x25 km



© European Union 2017

Source: Joint Research Centre (JRC CGM3 12)

Processed by: Alterra meteorium



Quality overview



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Lleida, 9-11 August 2017

- Most of the countries are reporting a season slightly earlier
 - BE: 2 weeks earlier
 - FR: 1 week earlier
 - CZ, NL: 3-5 days
 - RO, HU, PL: normal timing
 - Baltics and Greece: two weeks later
- Sizing:
 - Less fruit and tree/drop leading to large size in general
 - DE, FR, BE: generally large size
- Quality:
 - Unpredictable and many variations leading to difficult estimate, some damage eliminated with thinning
 - Frost ring and russetting present
 - Sunburst
 - Some hail damages primarily towards the (South-) East and Italy
 - Many questions open :
 - Quality of produce
 - long long term storability of produce





www.wapa-association.org
www.prognosfruit.eu