

# Apple market Review season 2017/18

PROGNOSFRUIT CONGRESS 2018

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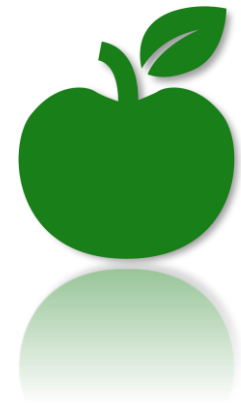


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# Summary



- Consumers spend a lot of money on scarce apples
  - ✓ No price elasticity in last months
  - ✓ Successful consumption in EU domestic market, less apples in housegardens stimulated demand, more than expected
  - ✓ EU exports below 1 Mio. tons of apples
- Less fruitsetting - limited shelf-life, therefore movement and stocks in line, no speculation possible!
  - ✓ More apples from oversea and more summerfruits without negative price impact in spring/summer
- Scarce processing volumes, very high price level
  - ✓ More flow from East to West
  - ✓ Higher price limit for table apples
- Regions with minimum 70 % of a normal crop had a very good season!

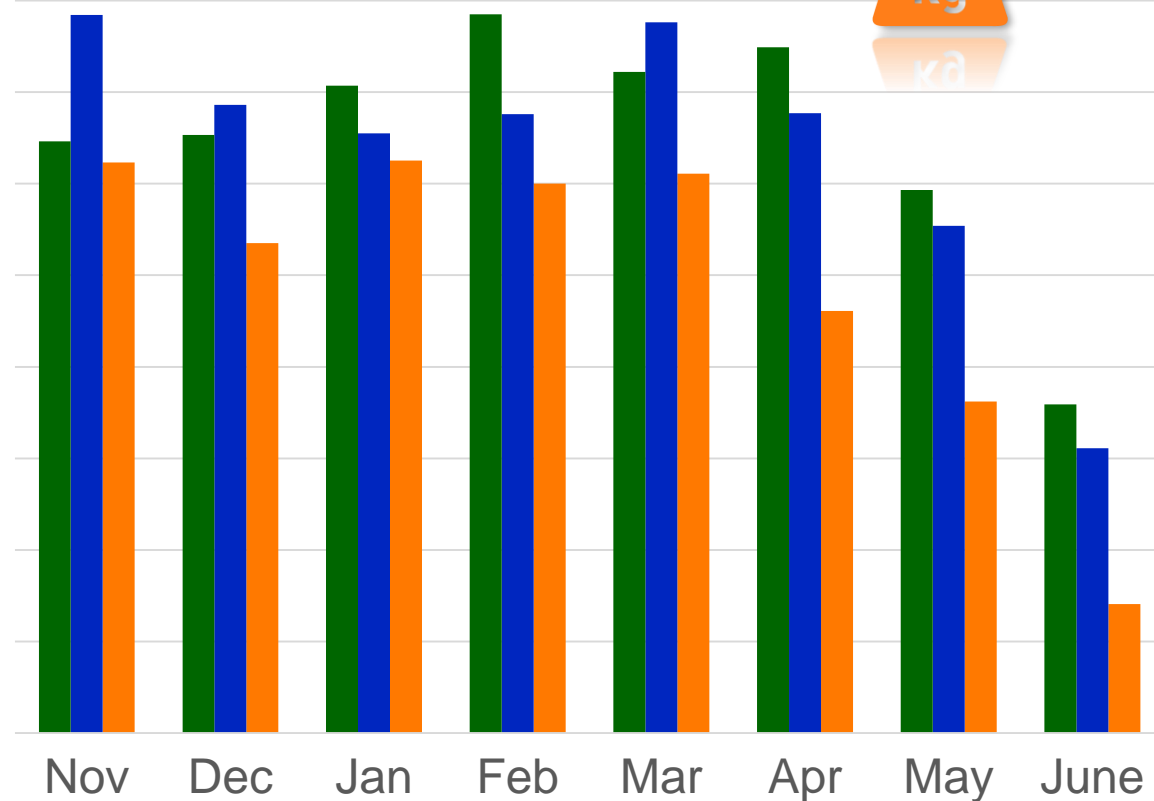


# Only in the last part of season less sales

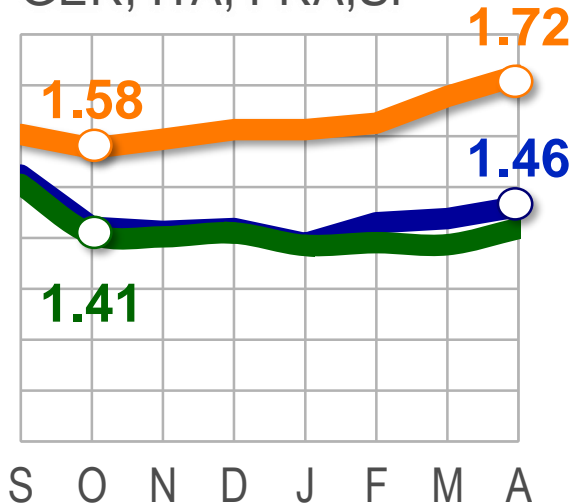


EU apples - Monthly movement , in 1.000 t, and retail prices, in EUR/kg

2015/16 2016/17 2017/18



Ø Monthly retail price  
GER, ITA, FRA, SP



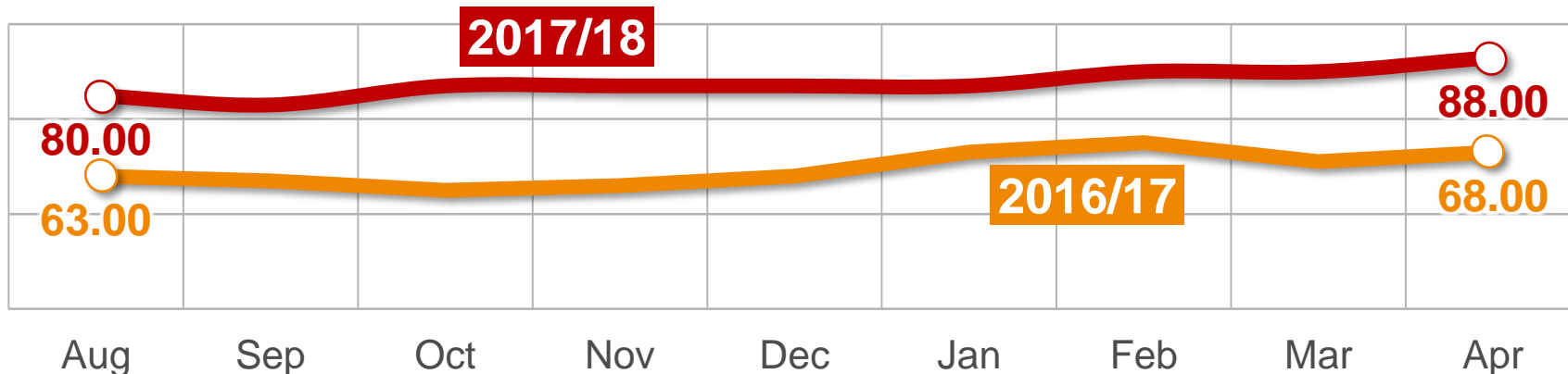
AUT, UK, BEL, NL, FRA, ITA, SP, GER: Consumption 2017 vs. 2016 = -1,9%

# Royal Gala – Season 2017/18



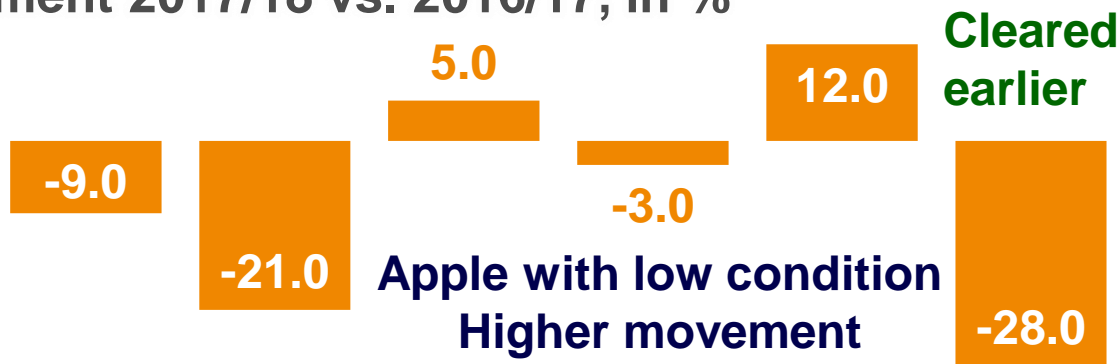
South Tyrol Gala 70-75 mm, price ex. region in EUR/100kg, excl. package

## Price



## Gala - Monthly EU movement 2017/18 vs. 2016/17, in %

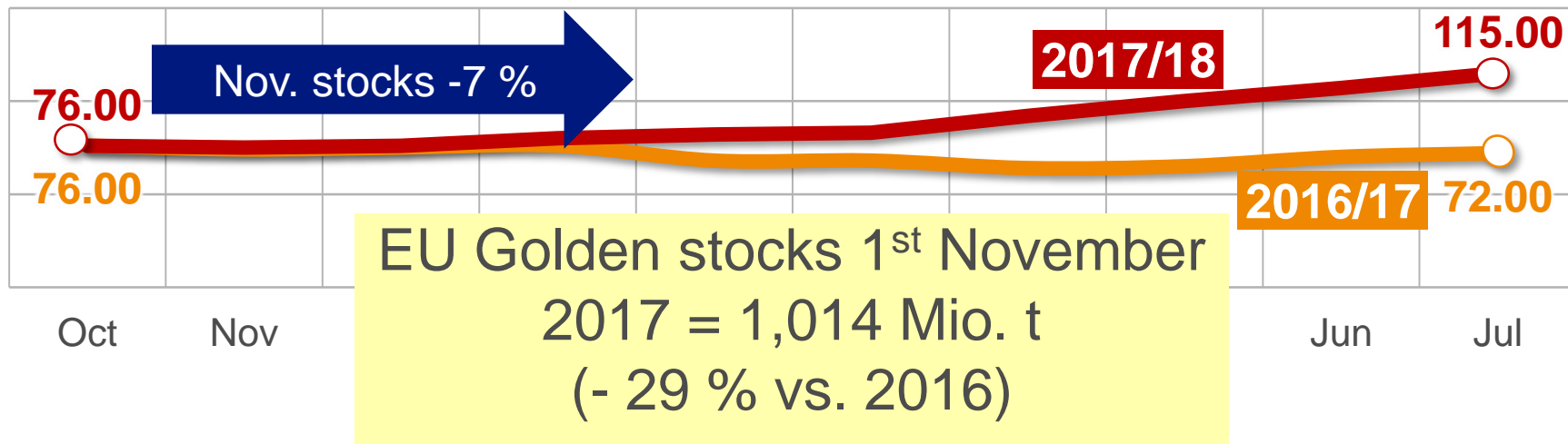
EU Gala stocks  
1<sup>st</sup> Nov. 2017  
522.000 t  
(-8 % vs. 2016)



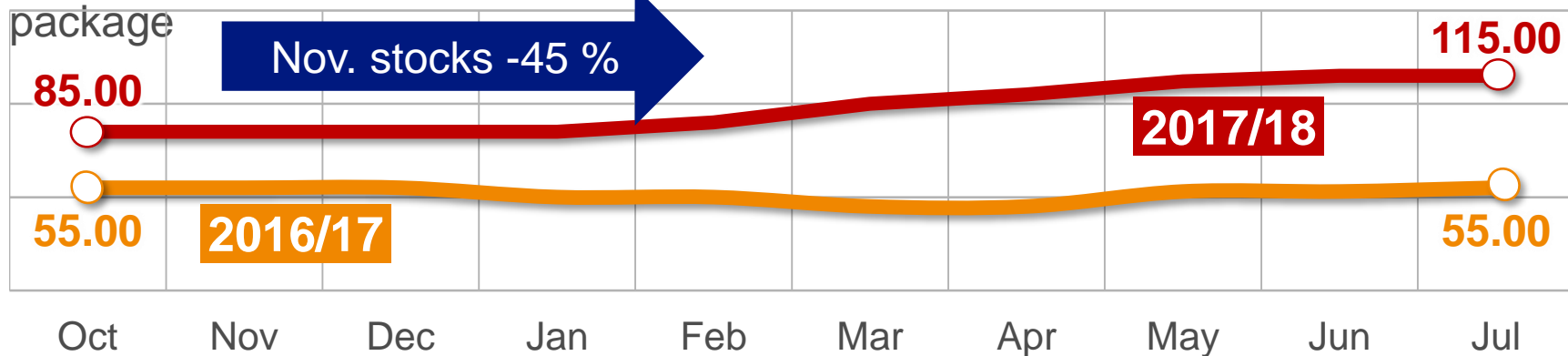
# Different Golden starting position



Price for French Golden Delicious, 70-75 mm double layer, ex. region, in EUR/100 kg net, incl. package



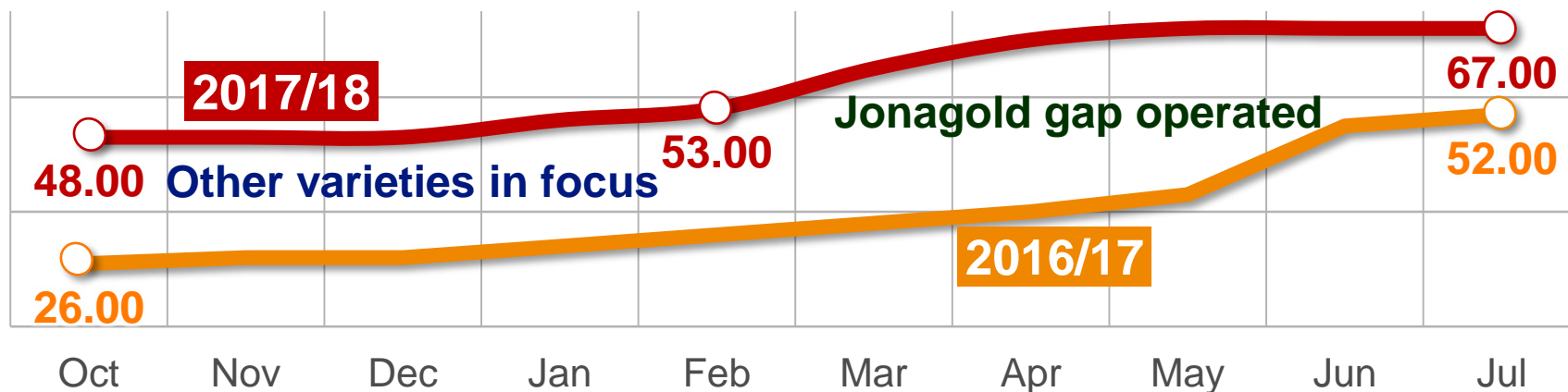
Price for Italian Golden Delicious, 75-80 mm, ex. region in EUR/100 kg, excl. package



# Jonagold group – Season 2017/18



Price for Polish Jonagold, 70-80 mm, ex. Region, in EUR/100 kg net, excl. package



## Jonagold - Monthly EU movement 2017/18 vs. 2016/17, in %



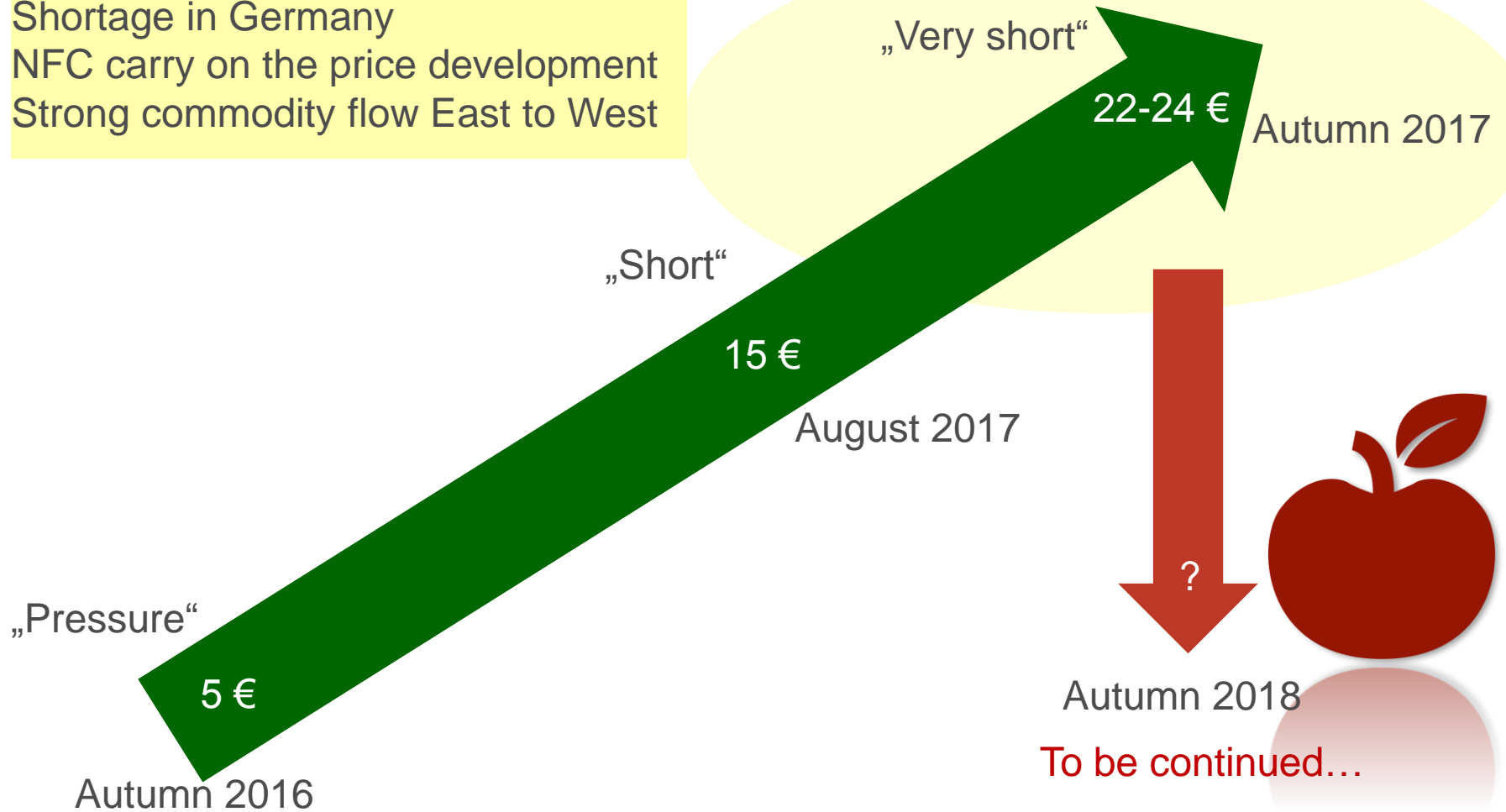
EU Jonagold stocks  
1st Nov. 2017  
267.000 t  
(-49 % vs. 2016)

# Processing – record price



Price for Polish processing apples, free Polish industry, in EUR/100 kg

Shortage in Germany  
NFC carry on the price development  
Strong commodity flow East to West



**Thanks a lot for your attention.**

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