



Prognosfruit

8-10 August 2018, Warsaw, Poland

European pear crop outlook 2018 a quantitative and qualitative review



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World Apple and
Pear Association
(WAPA)



Presentation structure



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- Validation 2017 data
- NH Pear forecast 2018: quantitative approach
- NH Pear forecast 2018: qualitative approach
- Final comments

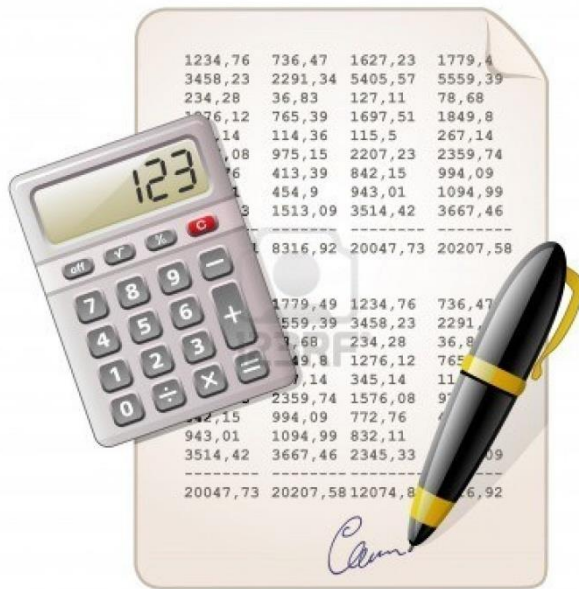


Validation 2017 data



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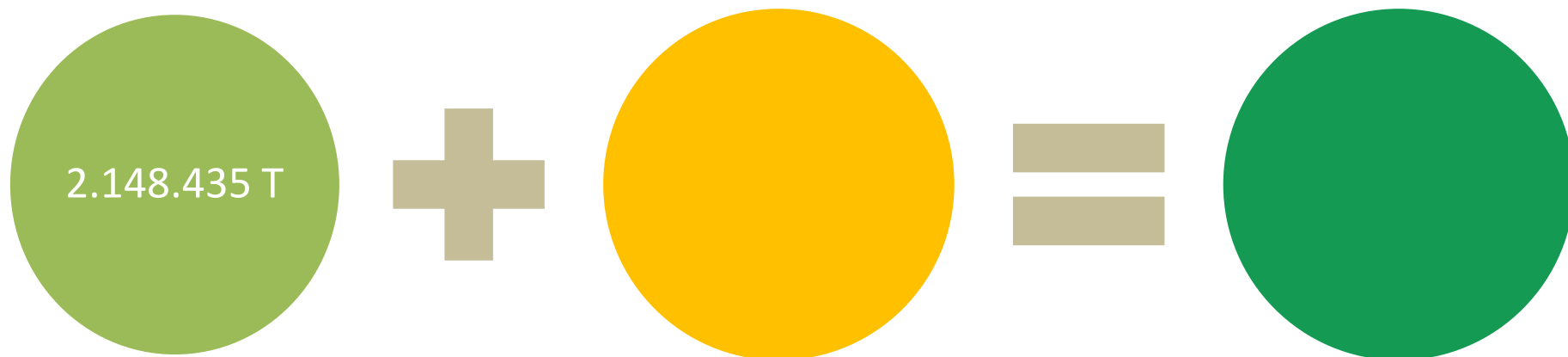


Forecast 2017 in Lleida



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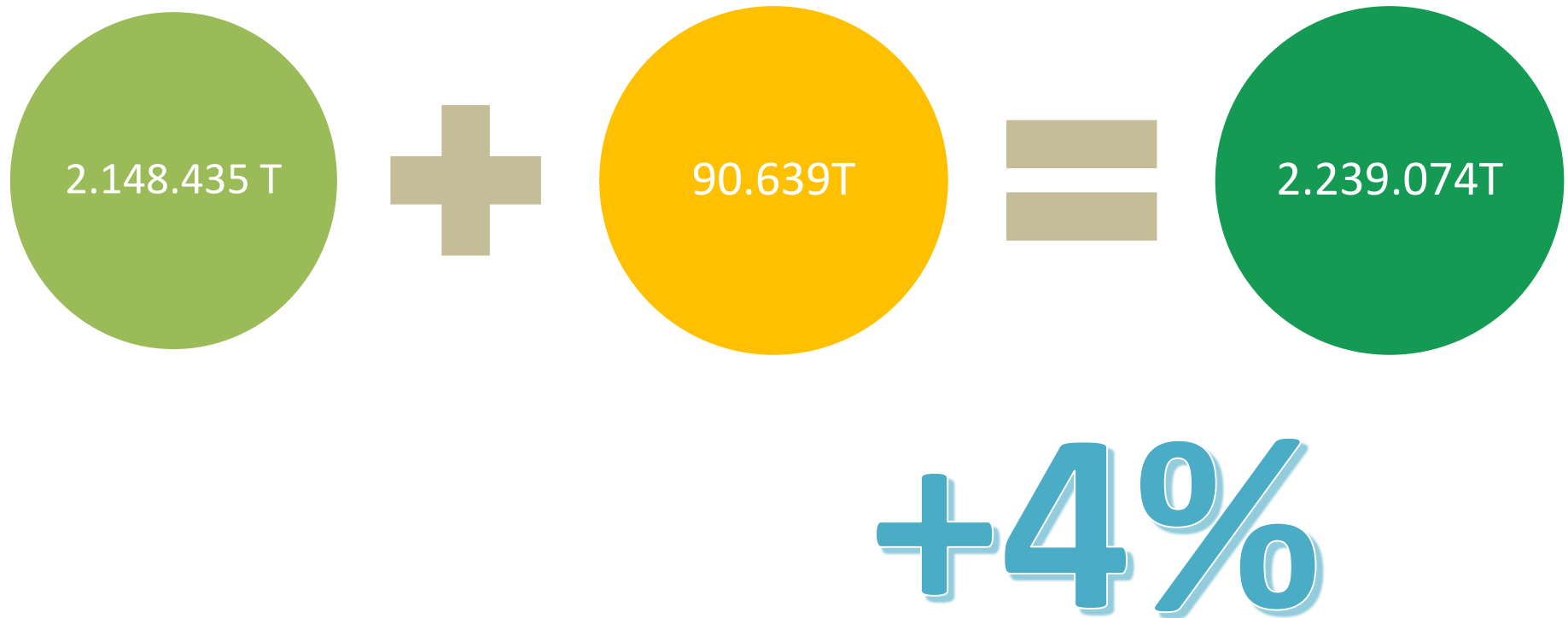
CROP FORECAST 2017 RANKING 9TH IN THE DECADE FIGURES

Forecast and actual results 2017



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Forecast and actual results over time



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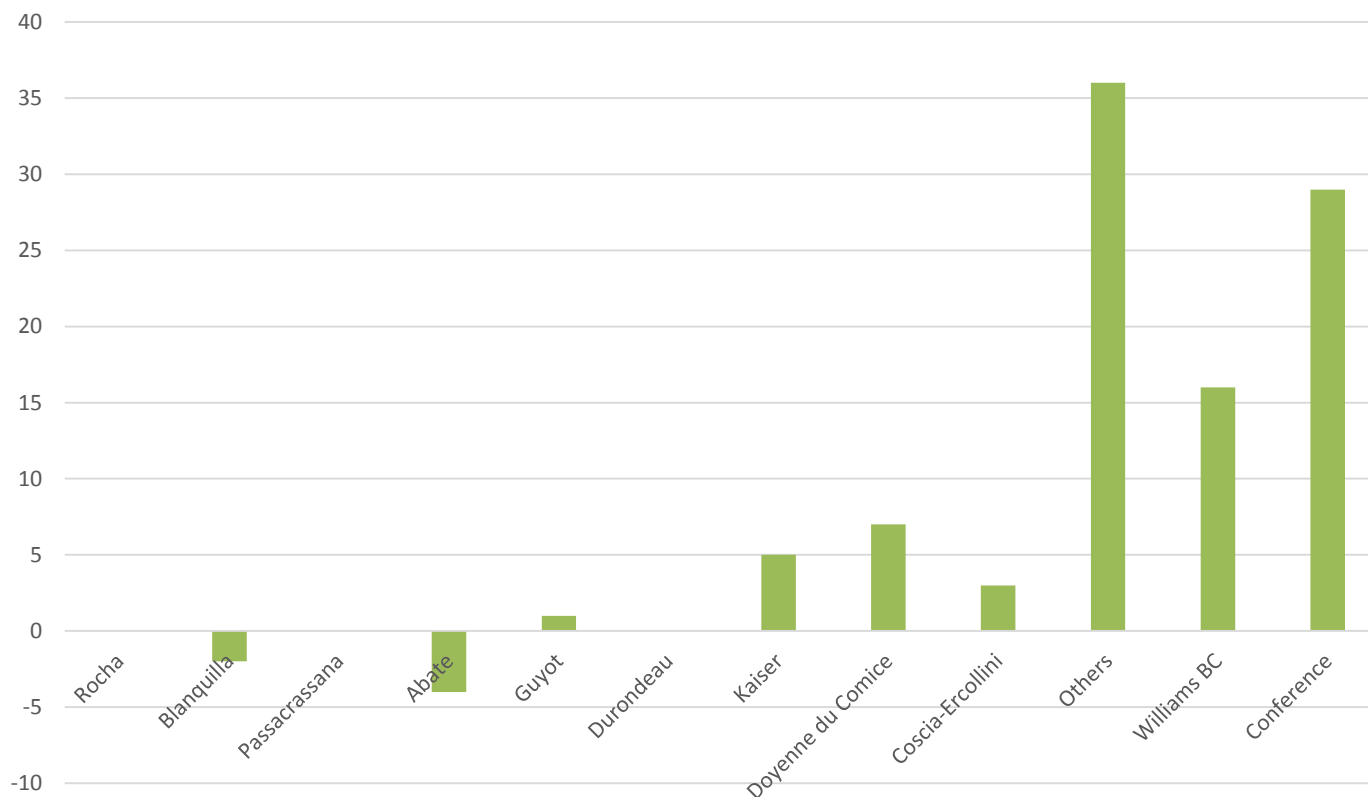
Forecast and actual results 2017



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Varieties change in 000T (Forecast vs. Final)



Total 90.639 T difference (4% increase variation)

Forecast and actual results 2017 (per variety)



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Variation in 000 T

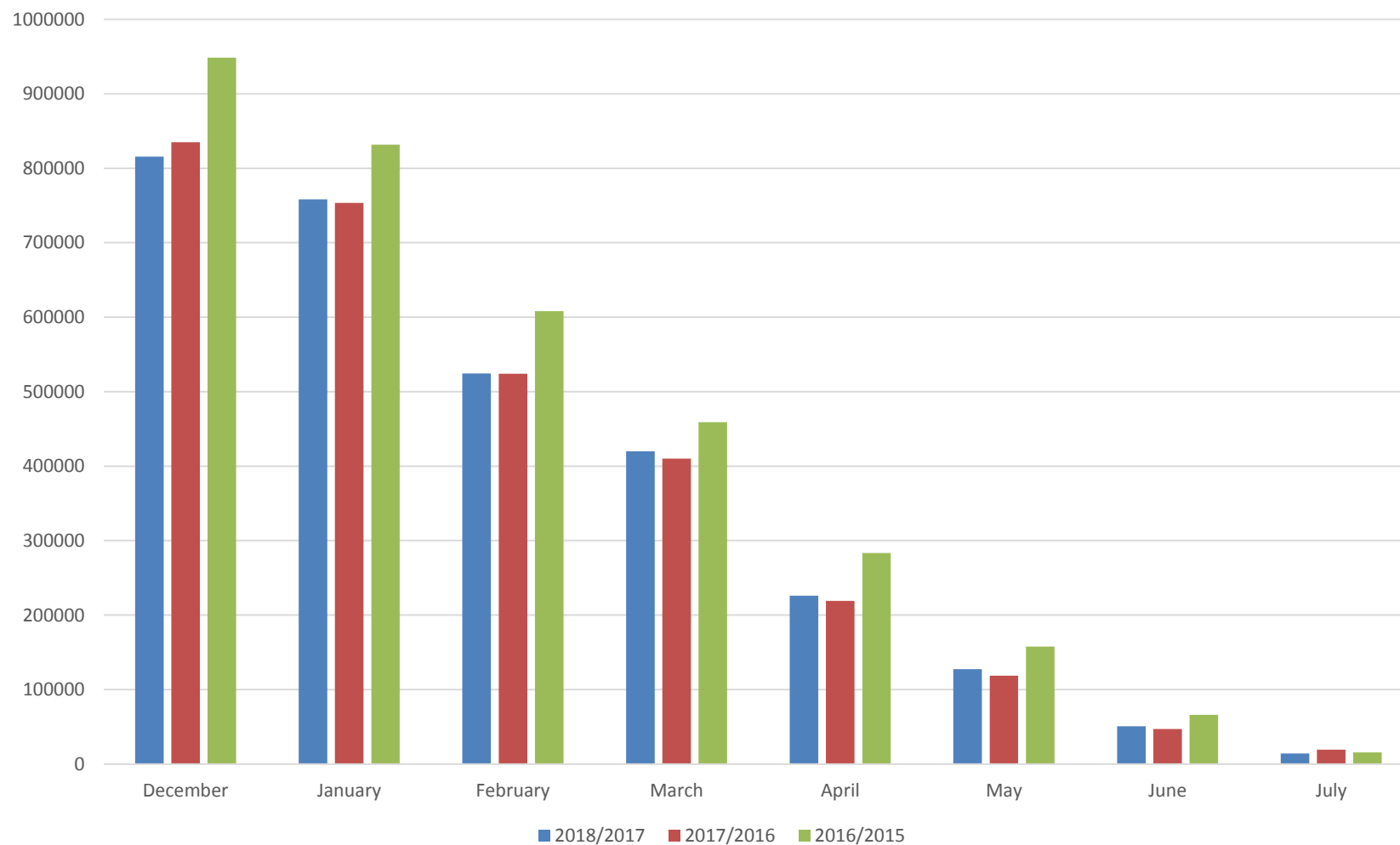
	2017 Forecast	2017 Final	VAR %	VAR T
Others	251	287	14%	36
Doyenne du Comice	52	59	13%	7
Kaiser	38	43	13%	5
Williams BC	247	263	6%	16
Coscia-Ercollini	76	79	4%	3
Conference	844	873	3%	29
Guyot	64	65	2%	1
Rocha	186	186	0%	0
Passacrassana	10	10	0%	0
Durondeau	3	3	0%	0
Blanquilla	45	43	-4%	-2
Abate	332	328	-1%	-4
Total	2.148	2.239	4%	91

Pears stock depletion



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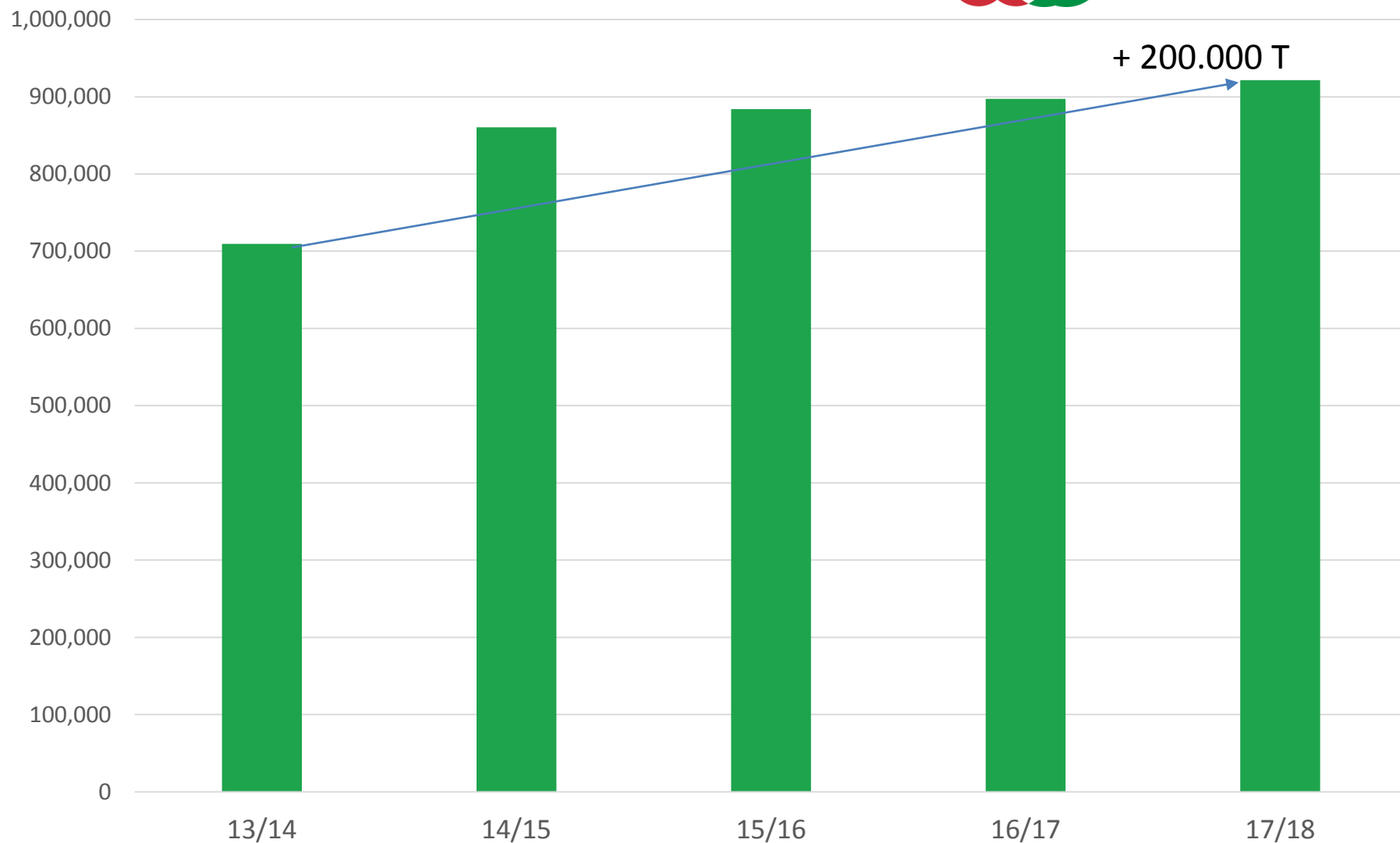


Growing intra EU trade of pears



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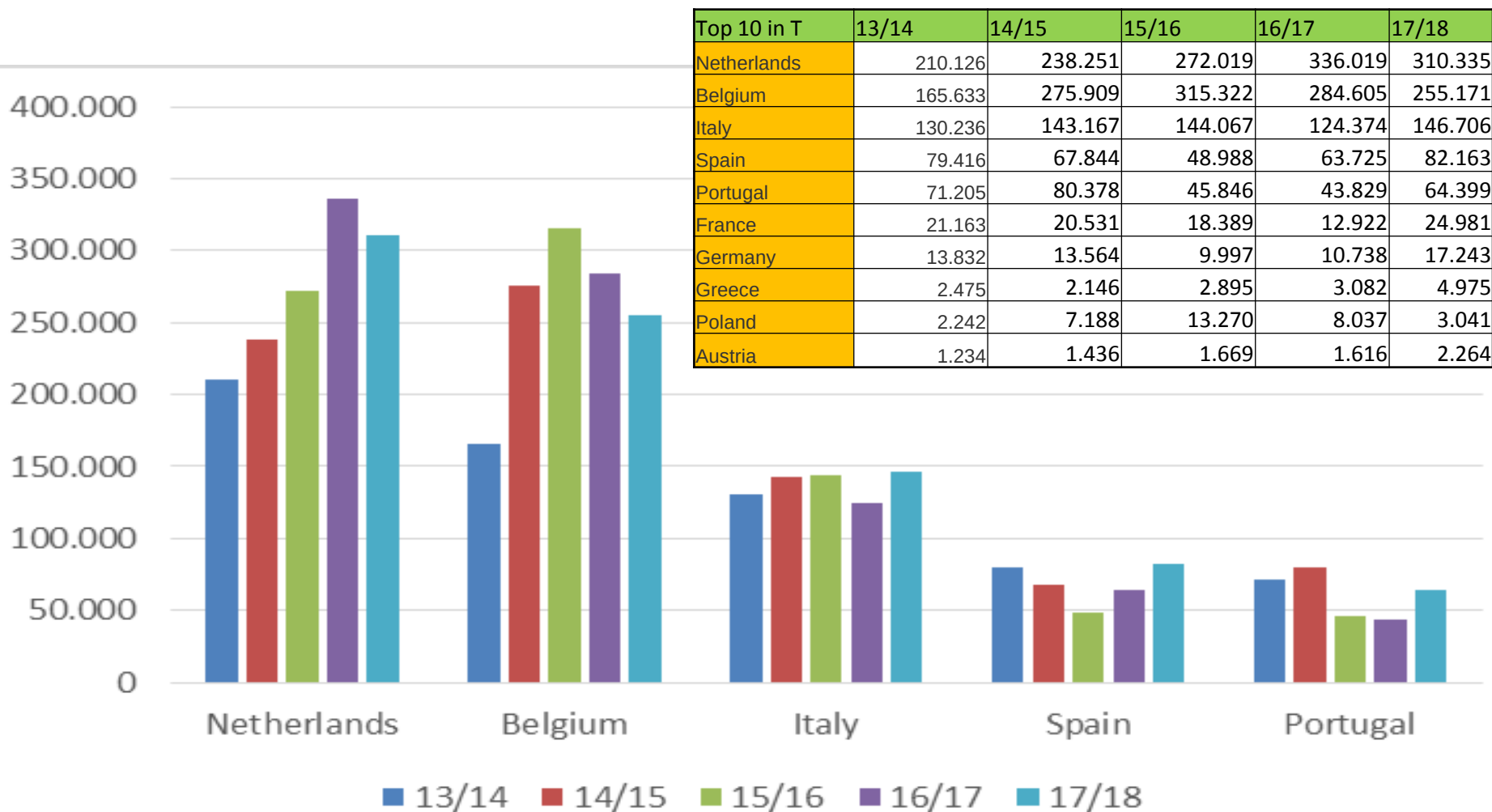


Main intra EU players



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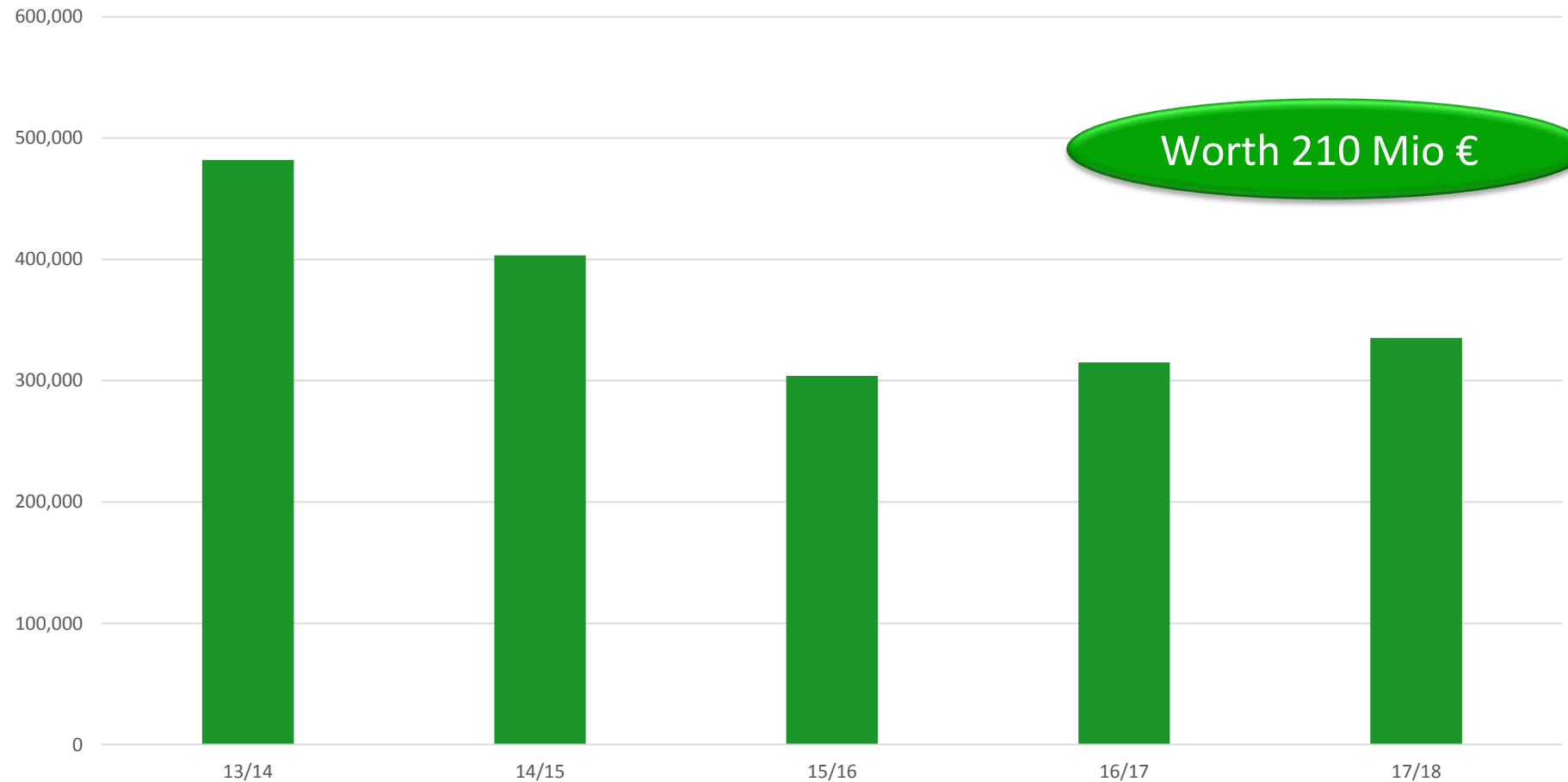
EU export of pears



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EU Export
in T by season



EU export of fresh pears



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	13/14	14/15	15/16	16/17	17/18
Lithuania	54.776	168.051	121.251	108.218	90.827
Spain	55.337	55.469	42.985	52.077	72.868
Portugal	57.627	61.309	35.644	40.052	50.655
Poland	43.837	22.290	24.964	43.295	34.303
Netherland	83.533	33.803	28.196	31.010	33.767
Belgium	155.728	32.088	29.508	23.829	25.597
Italy	20.519	20.150	13.924	9.170	14.026
France	4.650	1.824	1.083	1.199	4.487
Slovenia	2.459	4.135	2.387	2.191	4.032
Greece	1.859	2.544	2.653	2.410	2.783
Germany	804	273	326	151	848
Croatia	198	588	375	770	590
Denmark	387	505	484	525	435
Latvia	188	362	148	229	100
Romania	17	14	6	4	3
	481.918	403.403	303.935	315.130	335.322



TOP 10 in T	2017
Belarus	143.549
Brazil	60.424
Morocco	31.113
Norway	17.482
Bosnia Herz	12.701
Kazakhstan	10.332
Saudi Arabia	7.534
Switzerland	6.870
China	4.690
UAE	3.398

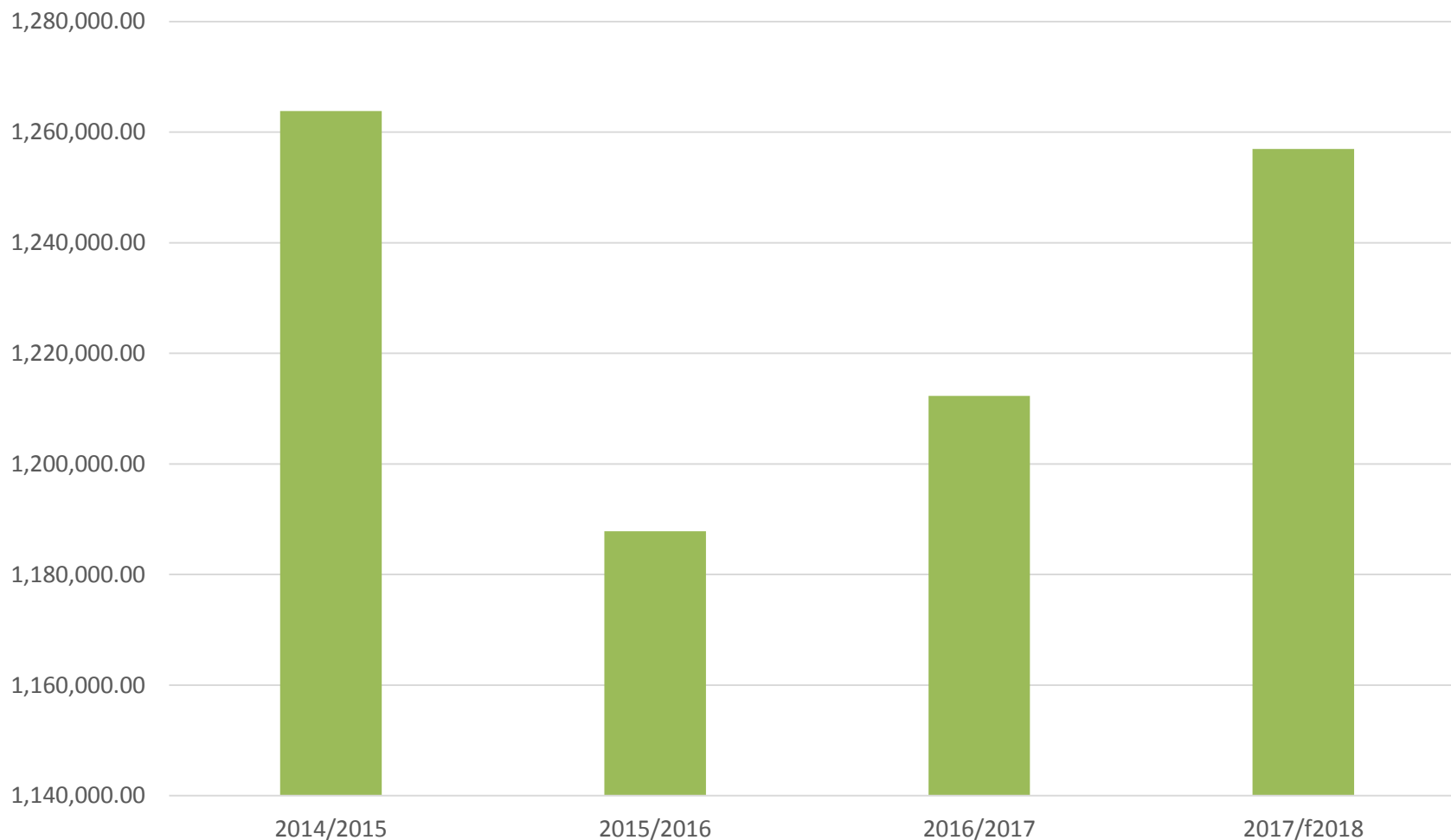
- 150.000 T

Pears trade perspective (intra + export)



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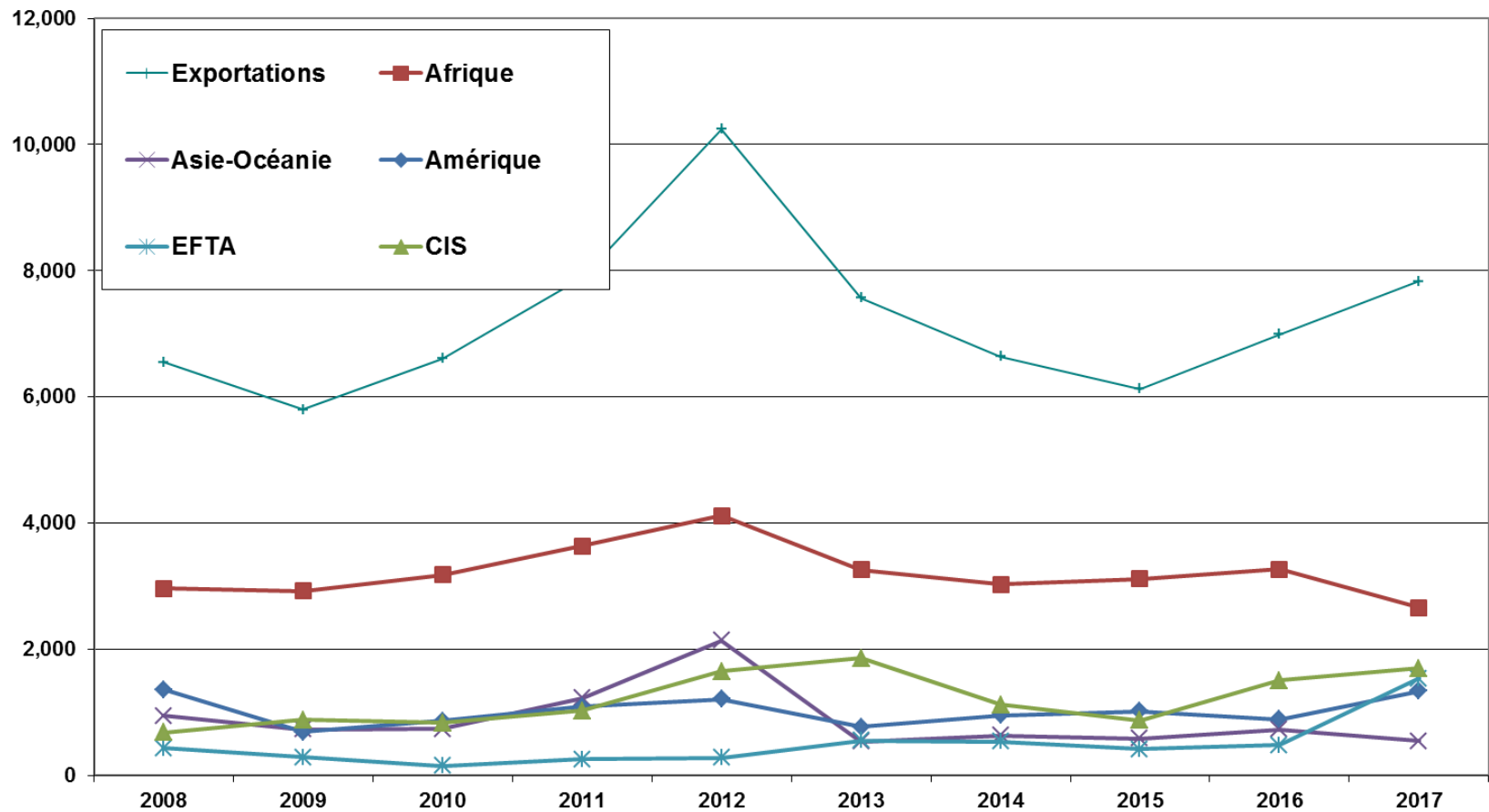


EU export of pear juice



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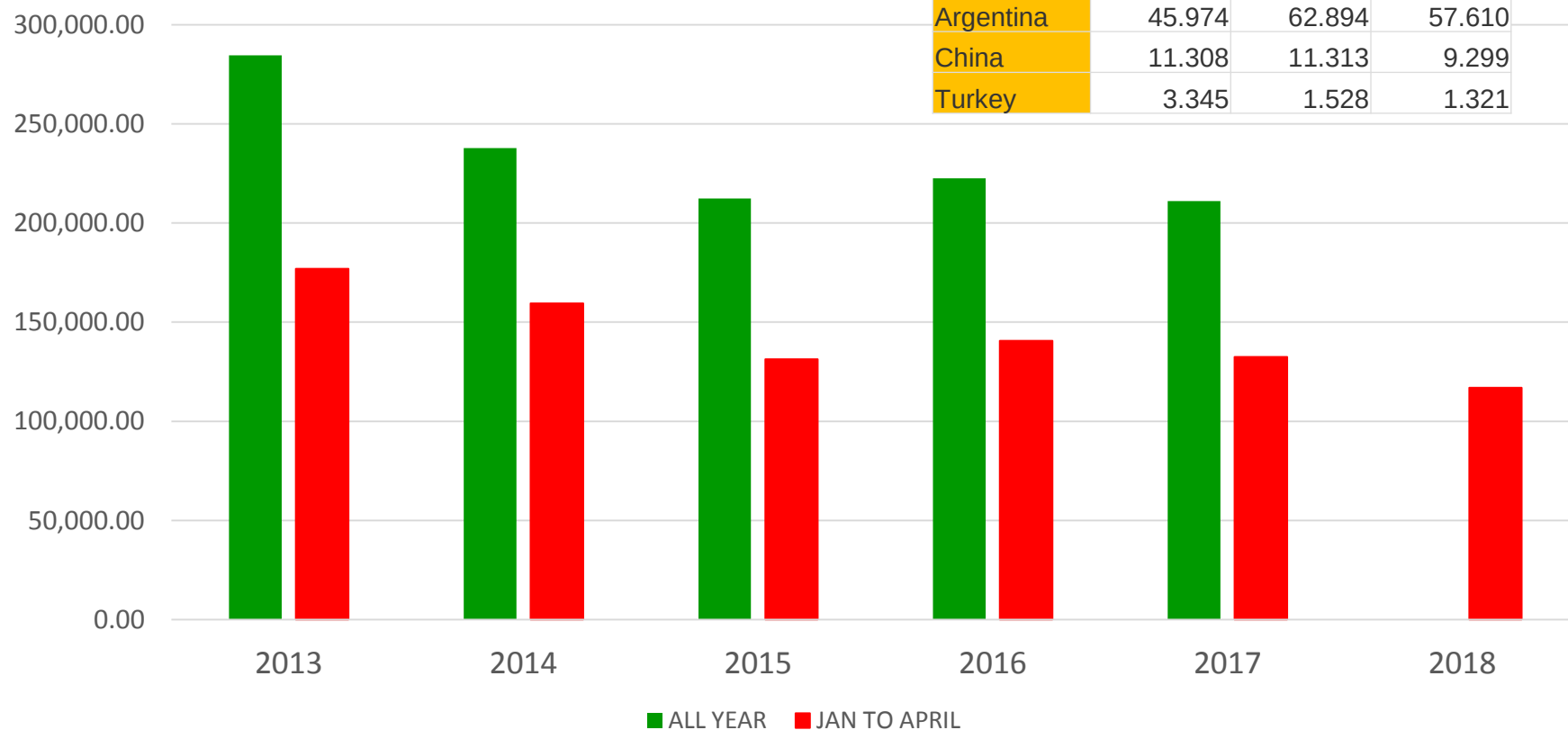
Import of fresh pears in the EU



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Import of pears
in T calendar year

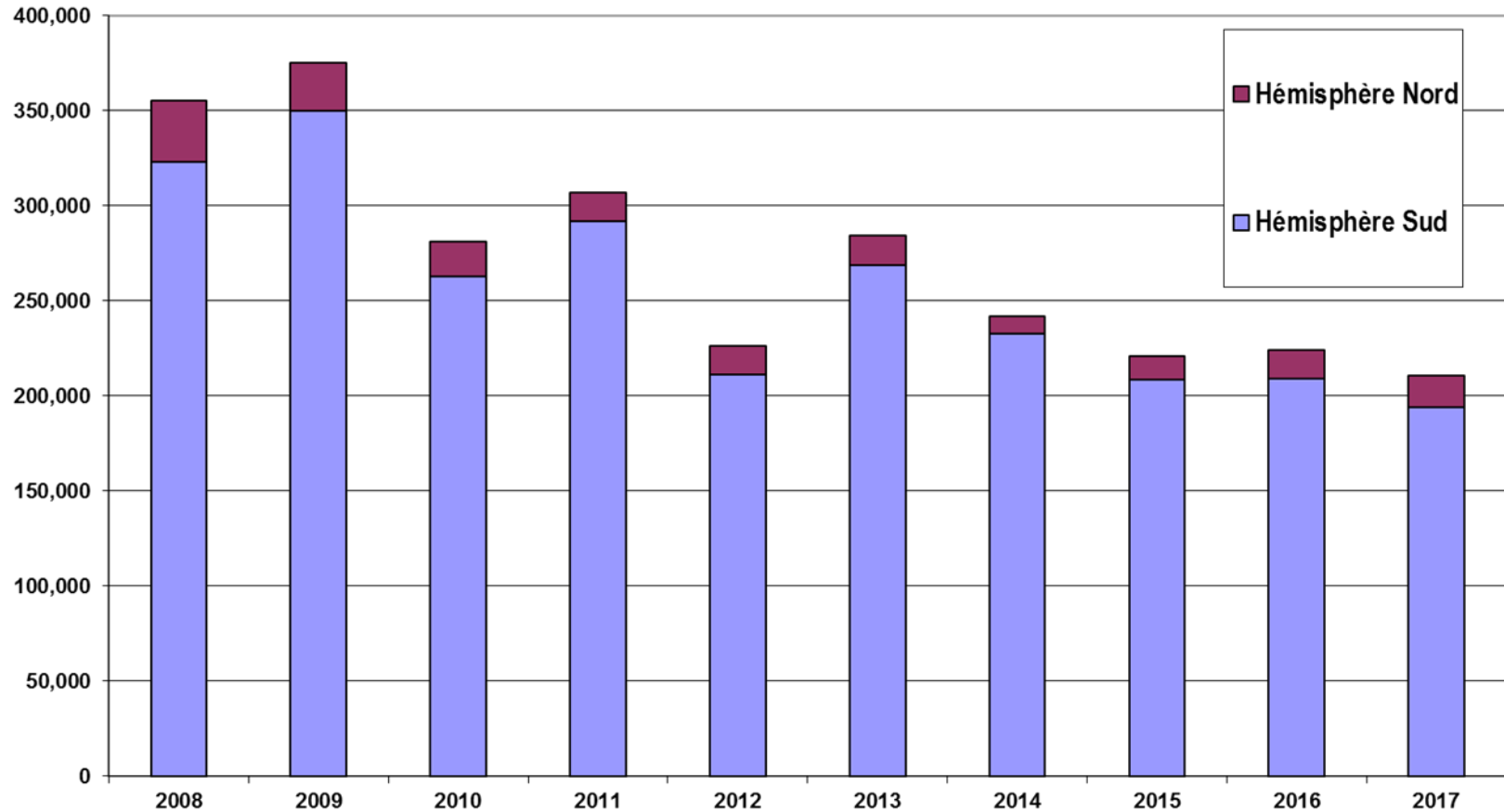


Import of fresh pears in the EU



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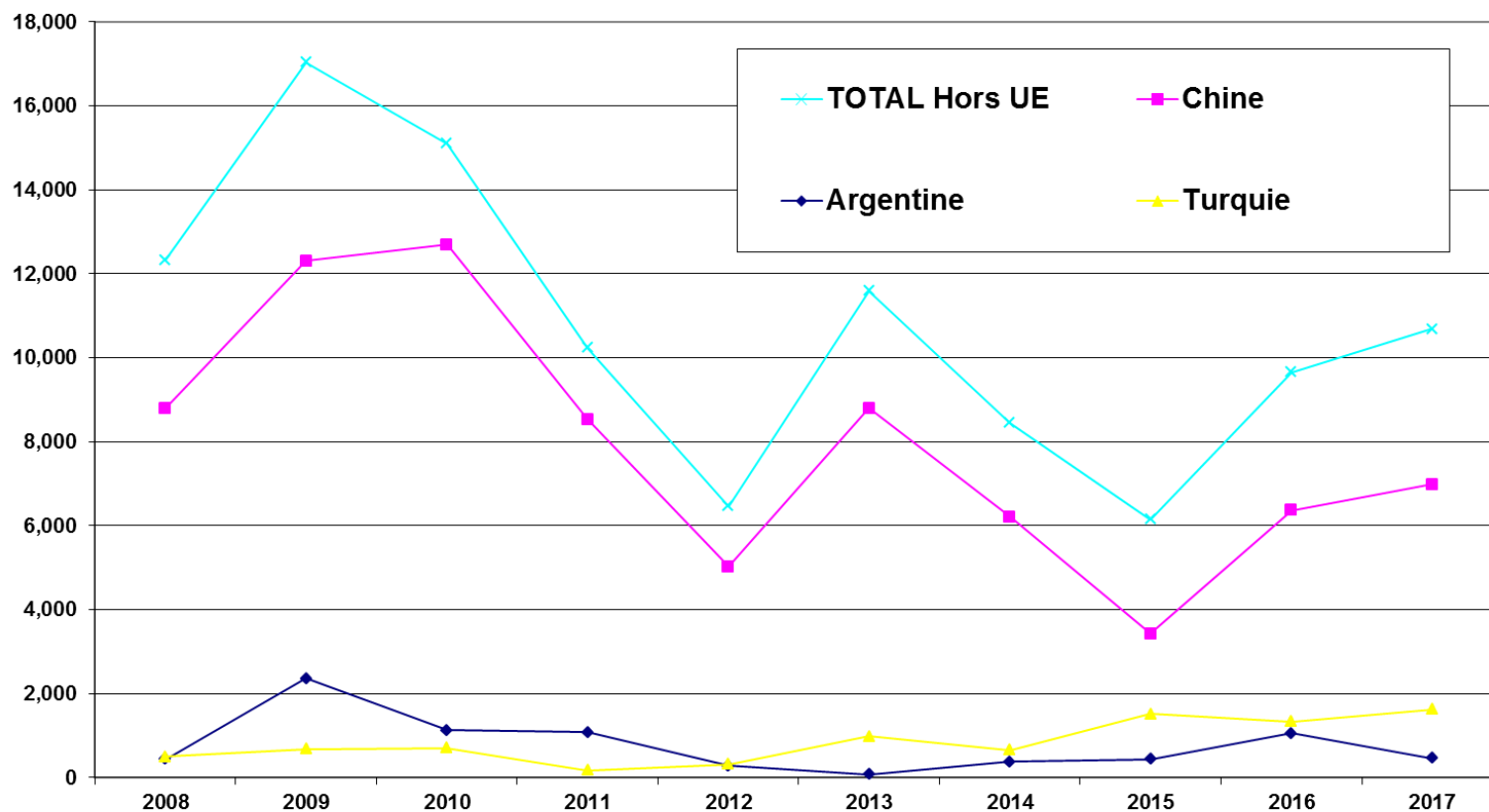


EU import of pear juice



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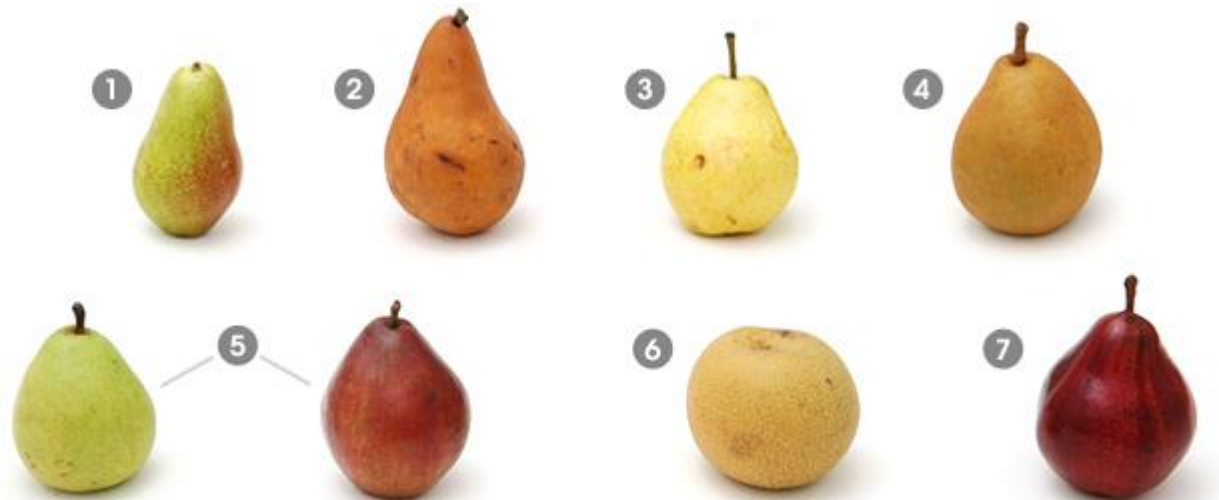




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Pear orchard review

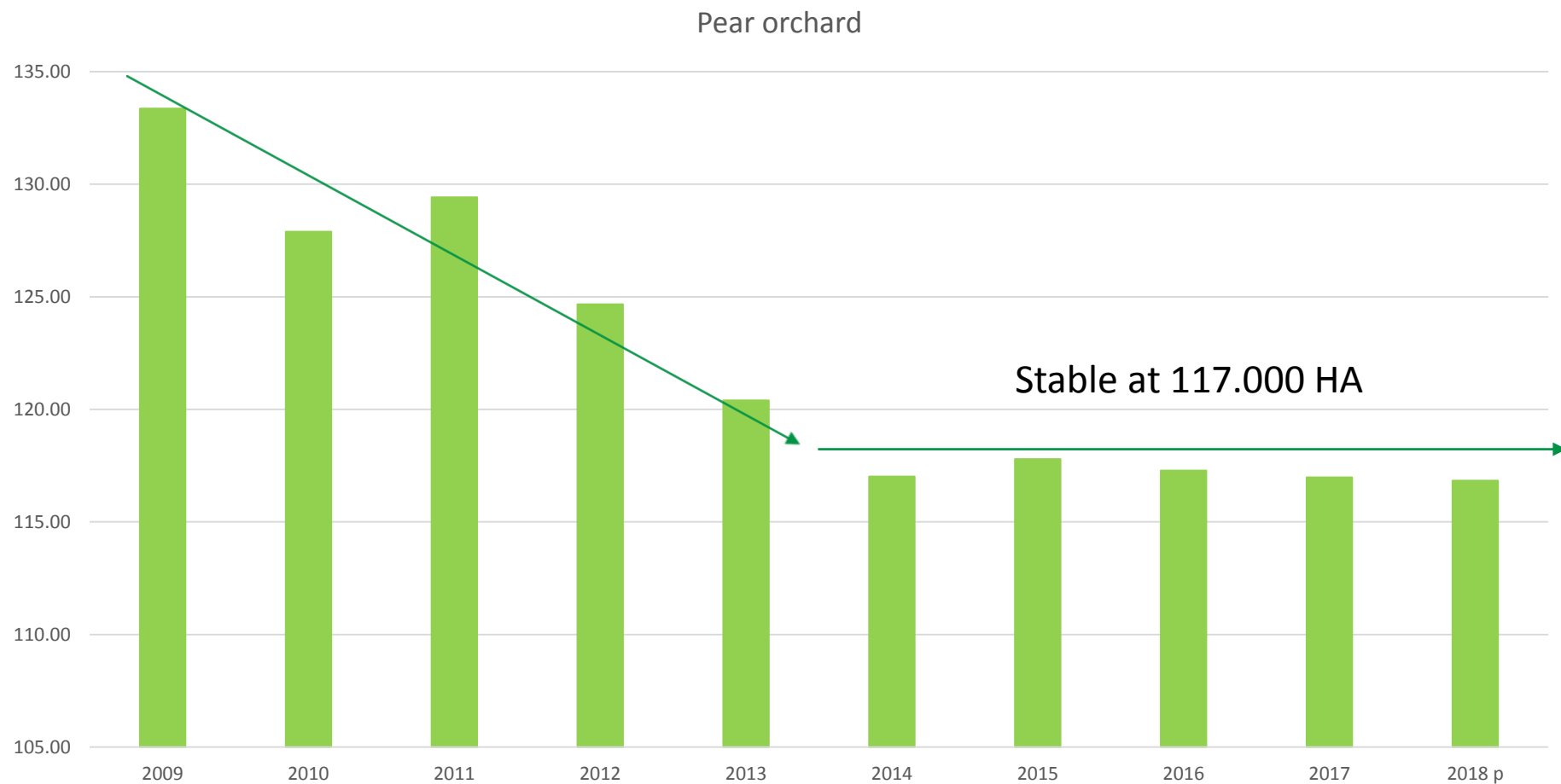


Pear total EU: Area (1000 HA)



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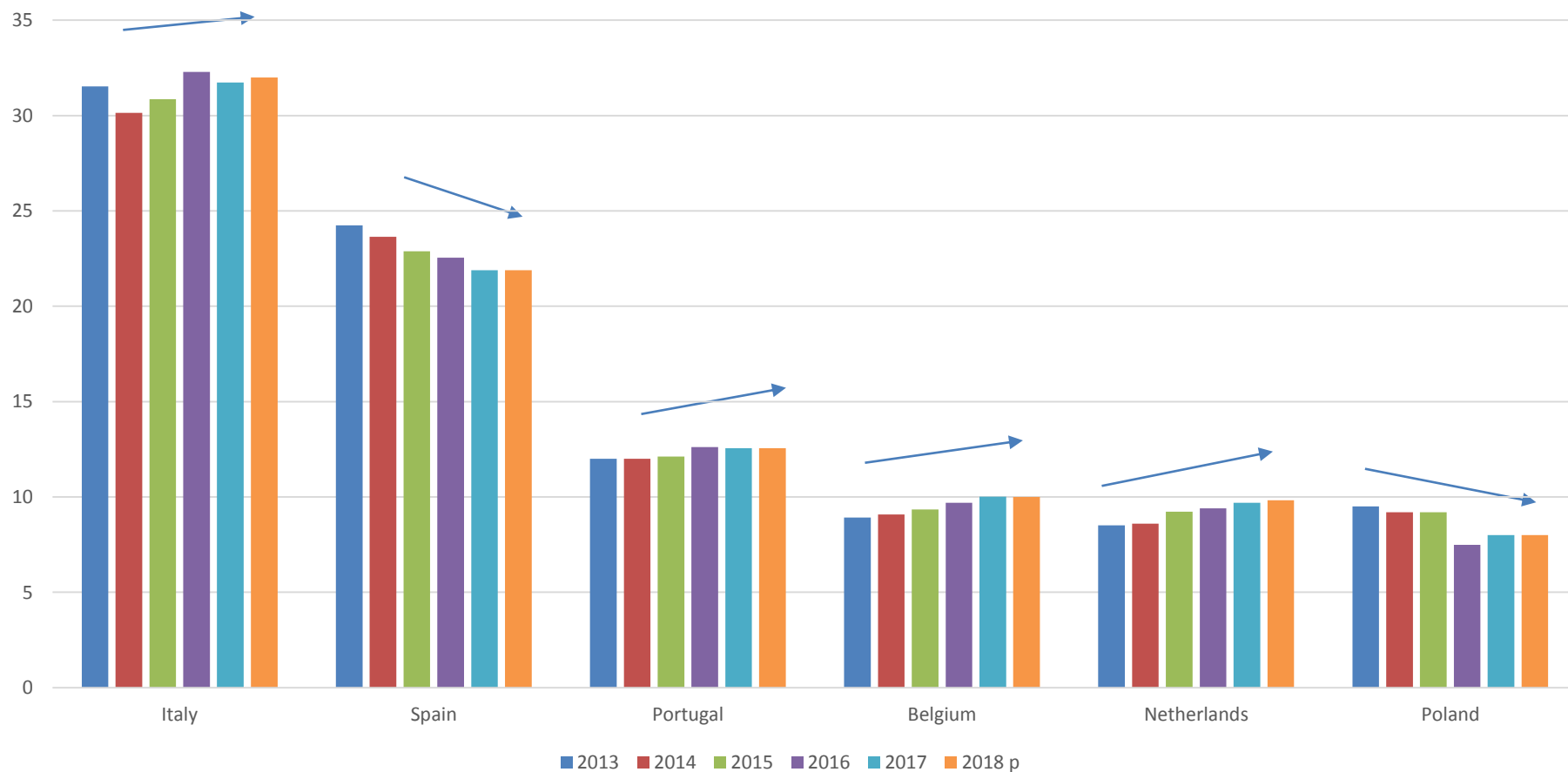
Source: Eurostat

Pears key MS: Area (1000 HA)



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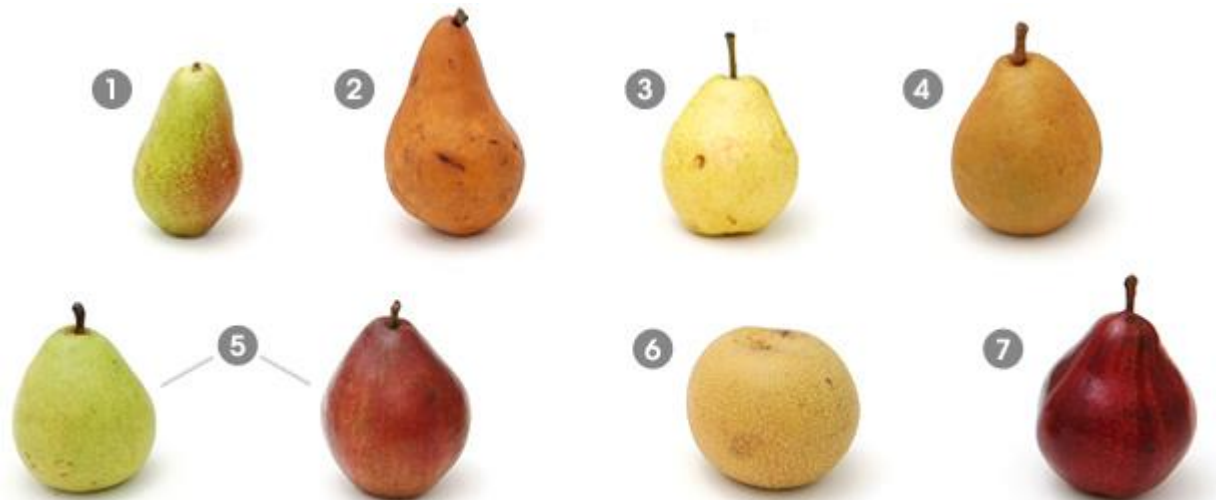




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Pears forecast 2018 quantitative approach EU 28 – by Member States



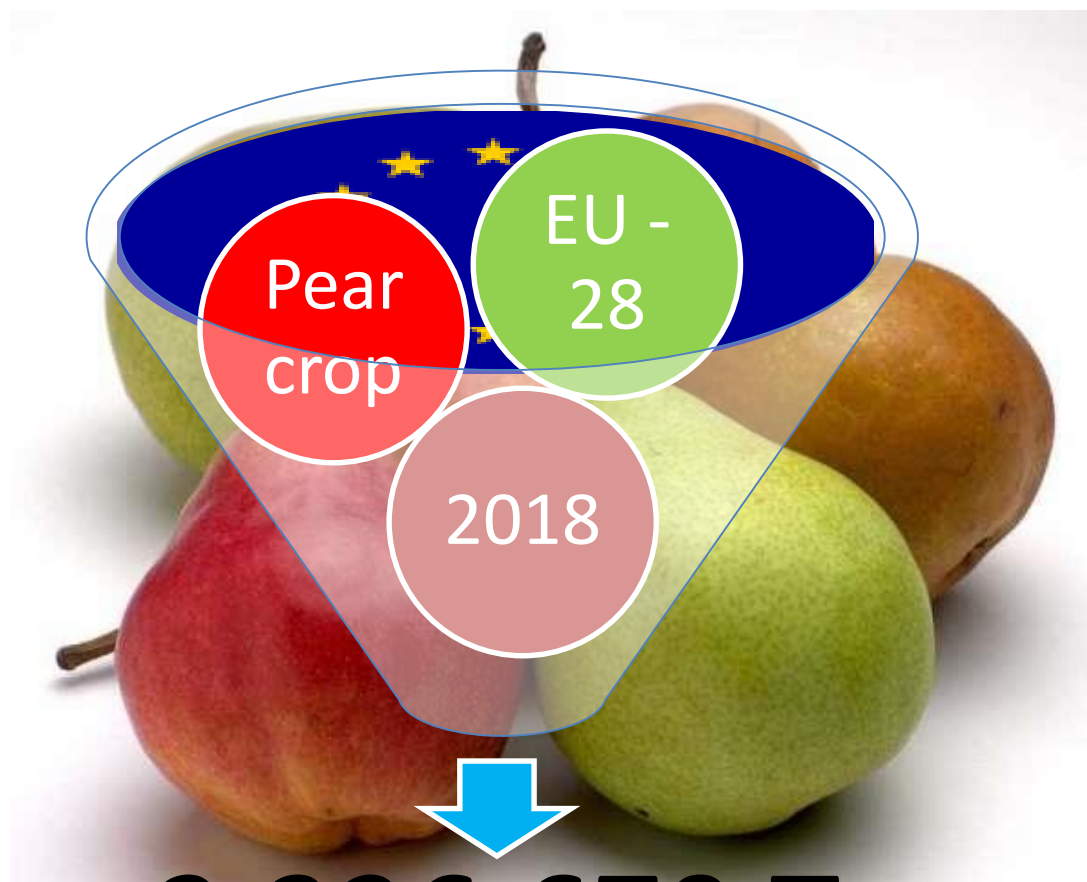


Pears forecast 2018



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2.326.679 T



Pears forecast 2018



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8-10 August 2018, Warsaw, Poland



2.326.679 T



EU-28 crop in perspective

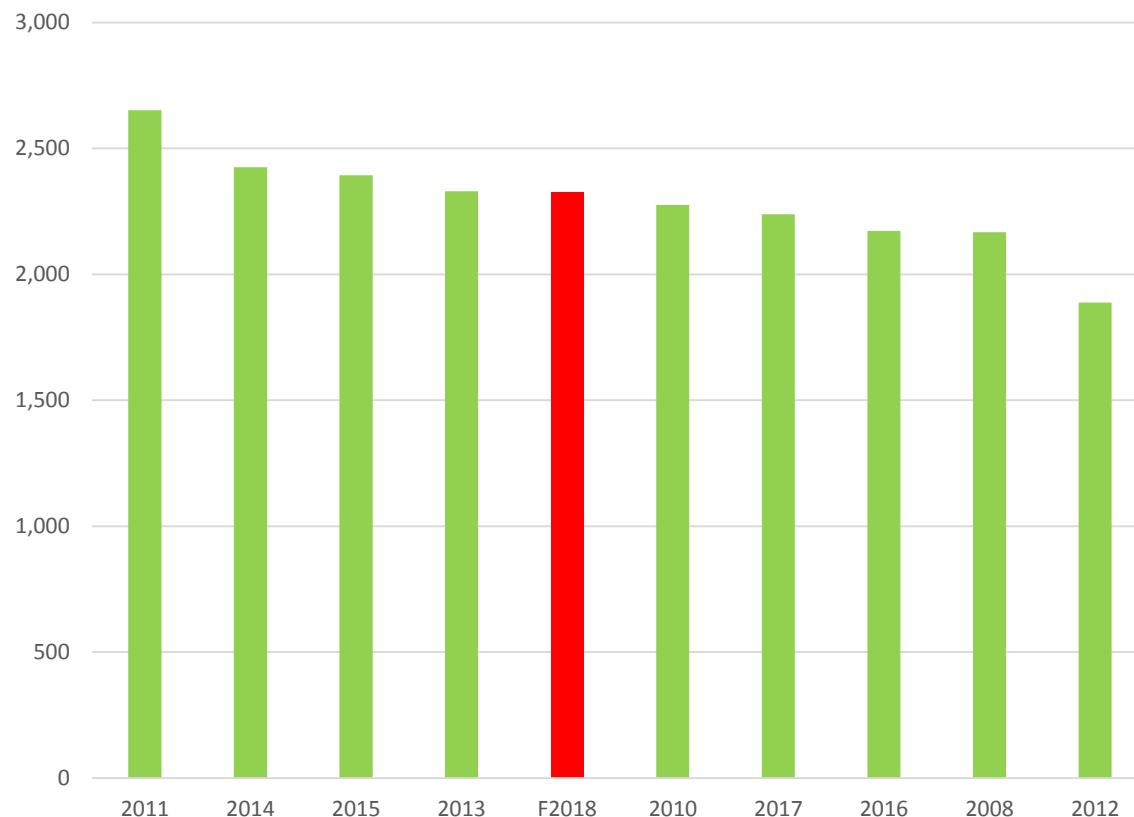


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Ranking	Year	'000 T
1	2011	2.652
2	2014	2.425
3	2015	2.394
4	2013	2.330
5	F2018	2.327
6	2010	2.276
7	2017	2.239
7	2016	2.173
8	2008	2.168
10	2012	1.888

Y2018 in perspective		
2.331	AV10Y	-0,2%
2.312	AV5Y	0,6%
2.246	AV3Y	2,6%
2.283	2017	3,9%



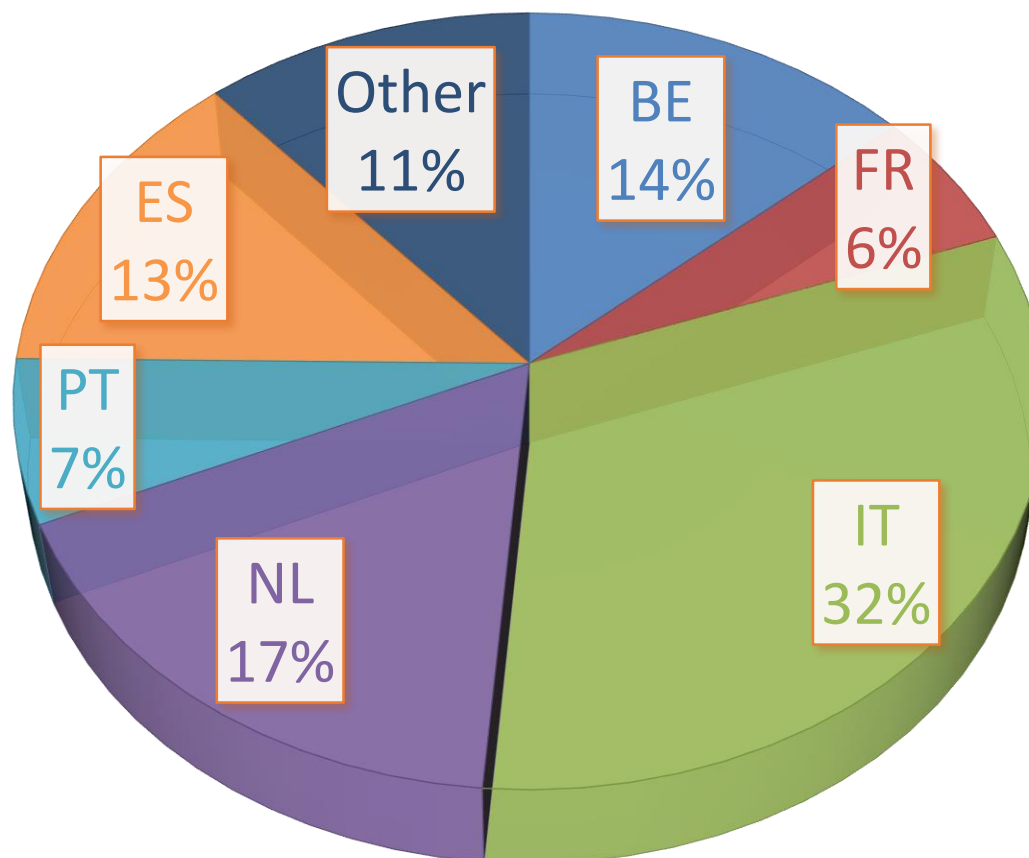


EU-28 pears: share by MS



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TOP 6 : IT- ES-BE-NL-PT-FR = 89 % of the EU production

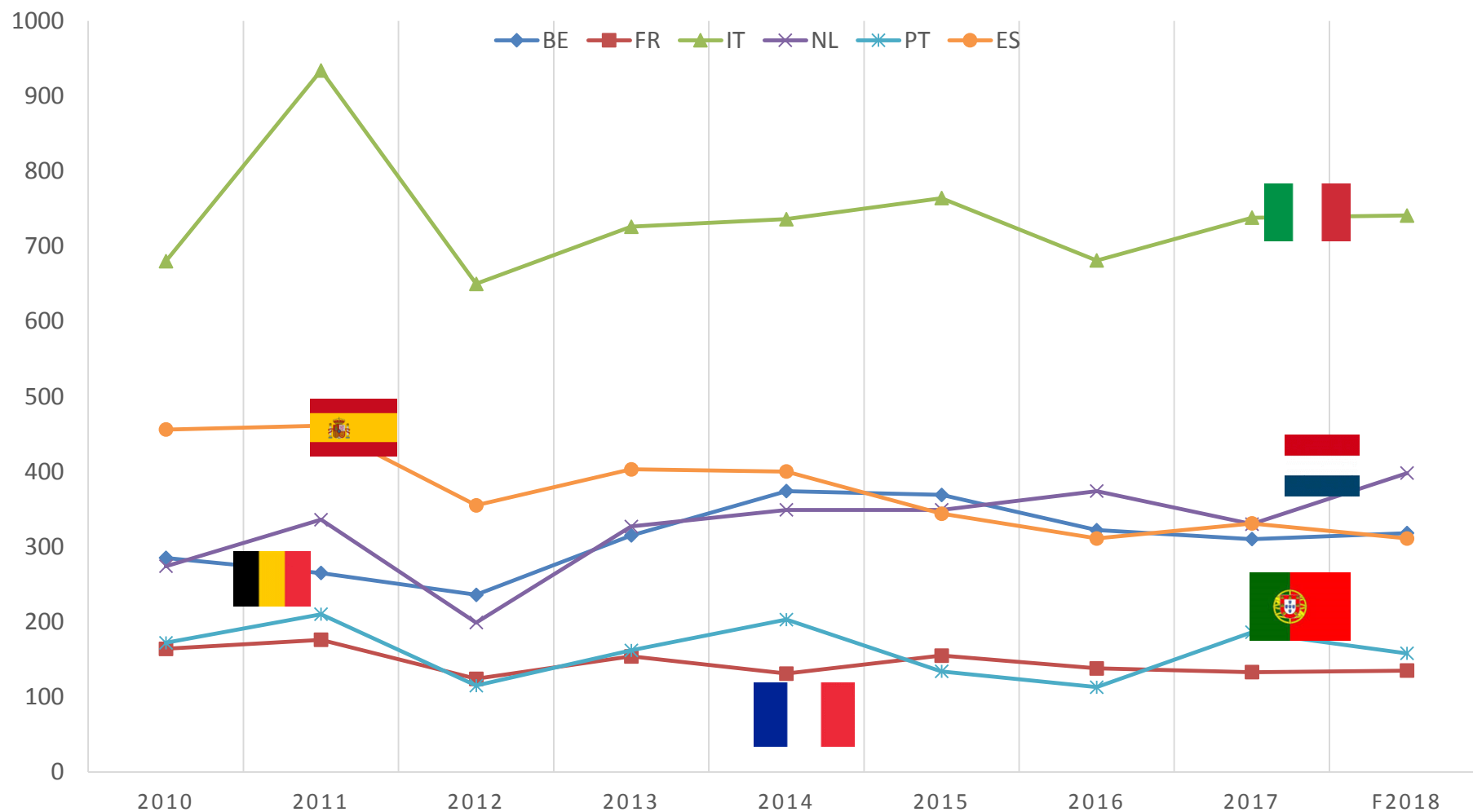


Main pears producers trends



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EU crop: Increase by 4% cf. 2017, stable cf. 10-year average



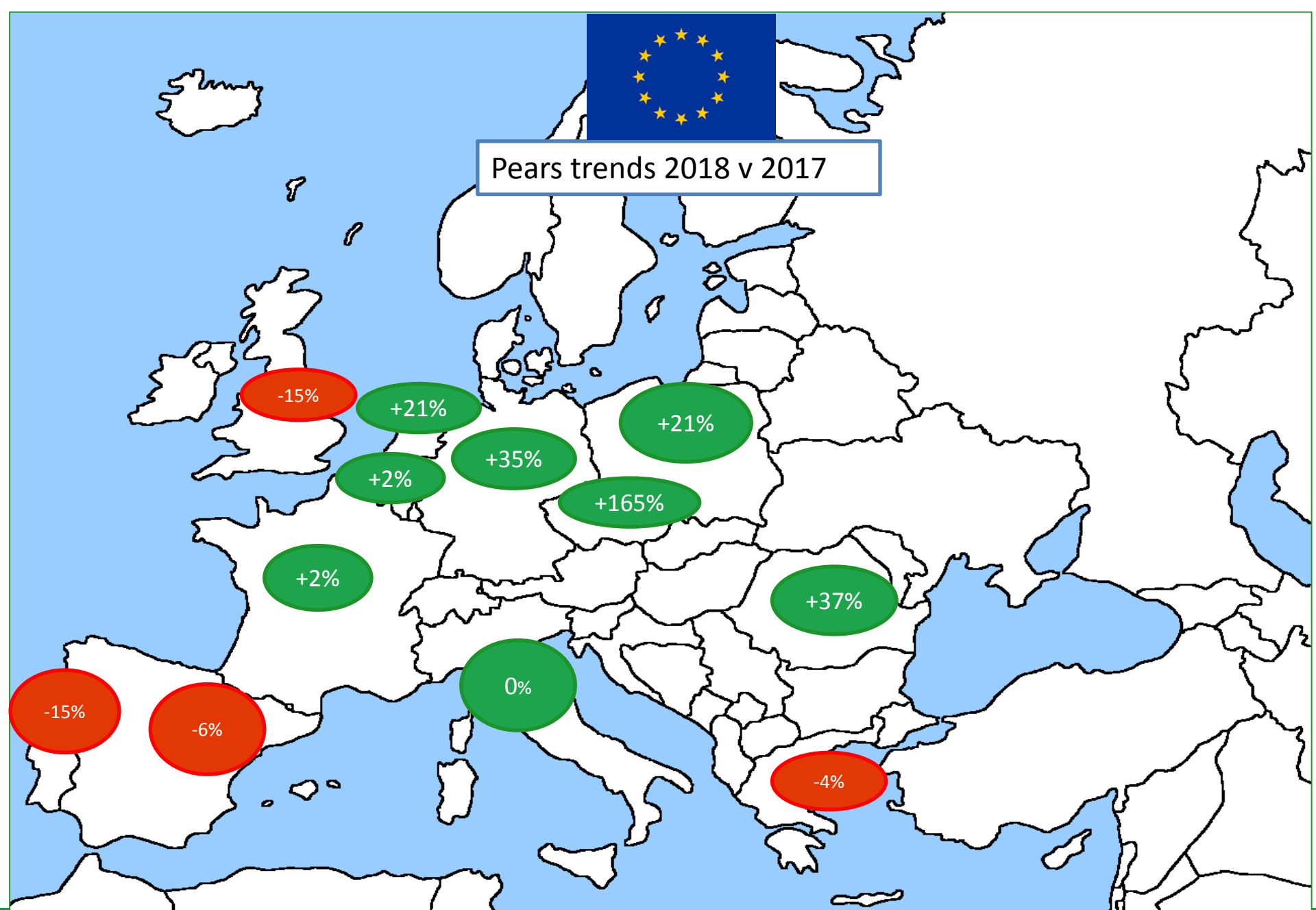
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	x 1000 tons											
	2009	2010	2011	2012	2013	2014	2015	2016	2017	F2018	(1)	(2)
+68.000 T	307	285	295				369	322	310	318	2	-5
	5	6	6				2	1	6	7	27	156
	6	3	3				10	7	4			
Denmark	7	6	5	5	6	6	6	6	5			
France				124	154	131	155	138	133			
Germany				34	34	45	43	35	23			
Greece				42	32	37	60	47	59	37	-4	2
Hungary				25			33	38	35	38	10	9
Italy				650			764	681	738	741	0	2
Latvia				0			0	0	0	0	-30	-28
Netherlands				199			349	374	330	308	21	13
Poland				45	65	50	80	55	40			
Portugal	198	172	210	115	162	203	134	113	184			
Romania	24	20	28	19	24	17	13	16	12			
Slovakia		1	1	0	1	0	1	0				
Slovenia		6	4	3			4	1	0	4	1.068	137
Spain		456	461	355			344	311	331	311	-6	-5
Sweden		1	2	1			1	1	1	2	150	150
UK	31	33	32	28			25	27	25	21	-15	-16
Total:	2.603	2.276	2.652	1.888	2.327	2.426	2.394	2.173	2.239	2.327	4	3



Pears trends 2018 v 2017





2018 crop pears forecast overview by Member State



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2.326.679 (19 MS)

+ ca 52.000 T (remaining 5 MS – Eurostat data)

x 1000 tons									
Country	2009	2010	2011	2012	2013	2014	2015	2016	2017
Austria	168,66	36,12	73,24	58,18	54,13	50,70	51,11	23,45	46,11
Bulgaria	1,44	1,40	2,00	1,36	2,91	2,15	2,95	1,99	2,84
Cyprus	1,30	1,28	1,15	1,13	1,07	0,76	0,68	0,59	0,55
Luxembourg	0,26	0,26	0,24	0,16	0,23	0,28	0,46	0,54	0,22
Finland	0,00	0,00	0,00	0,00	0,00	0,00	0,20	0,11	0,18

**Est 2018
51.896 T**

EU-28 : 2.378.575 T

+ Switzerland : 25.987 T

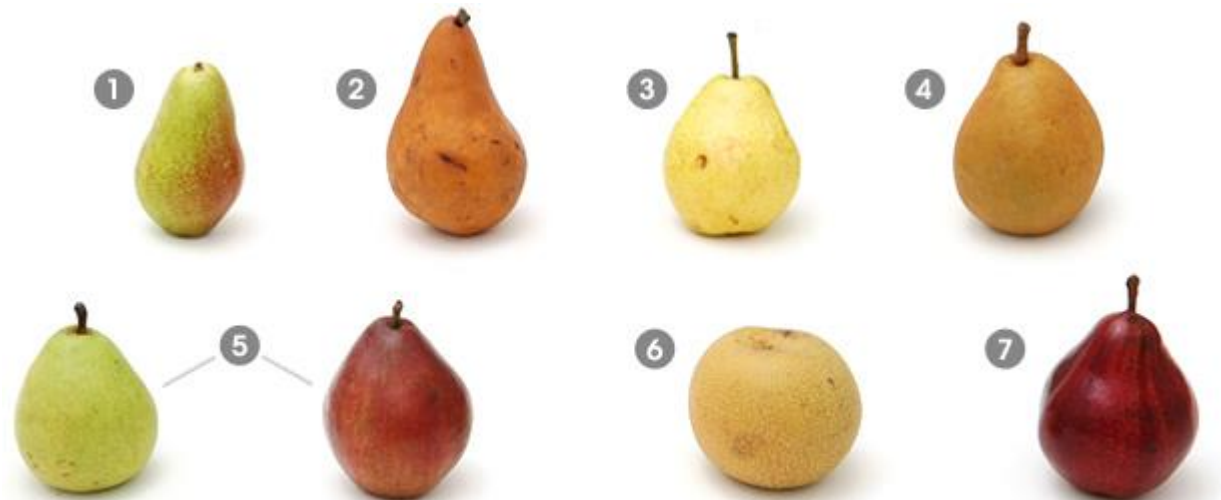
Grand total : 2.404.562 T



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Pear forecast 2018: quantitative approach EU 28 by varieties





EU 28 pears varieties



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8-10 August 2018, Warsaw, Poland

<i>x 1000 tons</i>													
Variety		2009	2010	2011	2012	2013	2014	2015	2016	2017	F2018	(1)	(2)
Abate F	2	306	224	404	256	304	358	333	296	328	333	2	5
Blanquilla		86	81	78	59	54	49	44	40	43	41	-4	-2
Conference	1	903	832	928	693	894	952	967	910	873	953	9	4
Coscia-Ercollini		106	98	80	77	80	66	79	67	79	70	-12	-7
Doyenne du Comice		116	97	107	58	83	94	87	81	59	74	26	-2
Durondeau		8	6	7	5	6	6	5	3	2	3	21	-18
Guyot		102	92	96	70	80	67	74	59	65	58	-11	-11
Kaiser		65	42	60	39	54	33	45	38	43	45	5	7
Passacrassana		19	15	17	17	14	11	12	11	9	9	1	-14
Rocha	5	197	171	209	115	162	203	134	113	186	158	-15	9
William BC	4	312	286	332	252	283	278	283	261	263	267	1	-1
Other	3	382	331	333	246	315	309	330	293	287	314	9	4
Total:		2.603	2.276	2.652	1.888	2.327	2.426	2.394	2.173	2.239	2.327	4	3

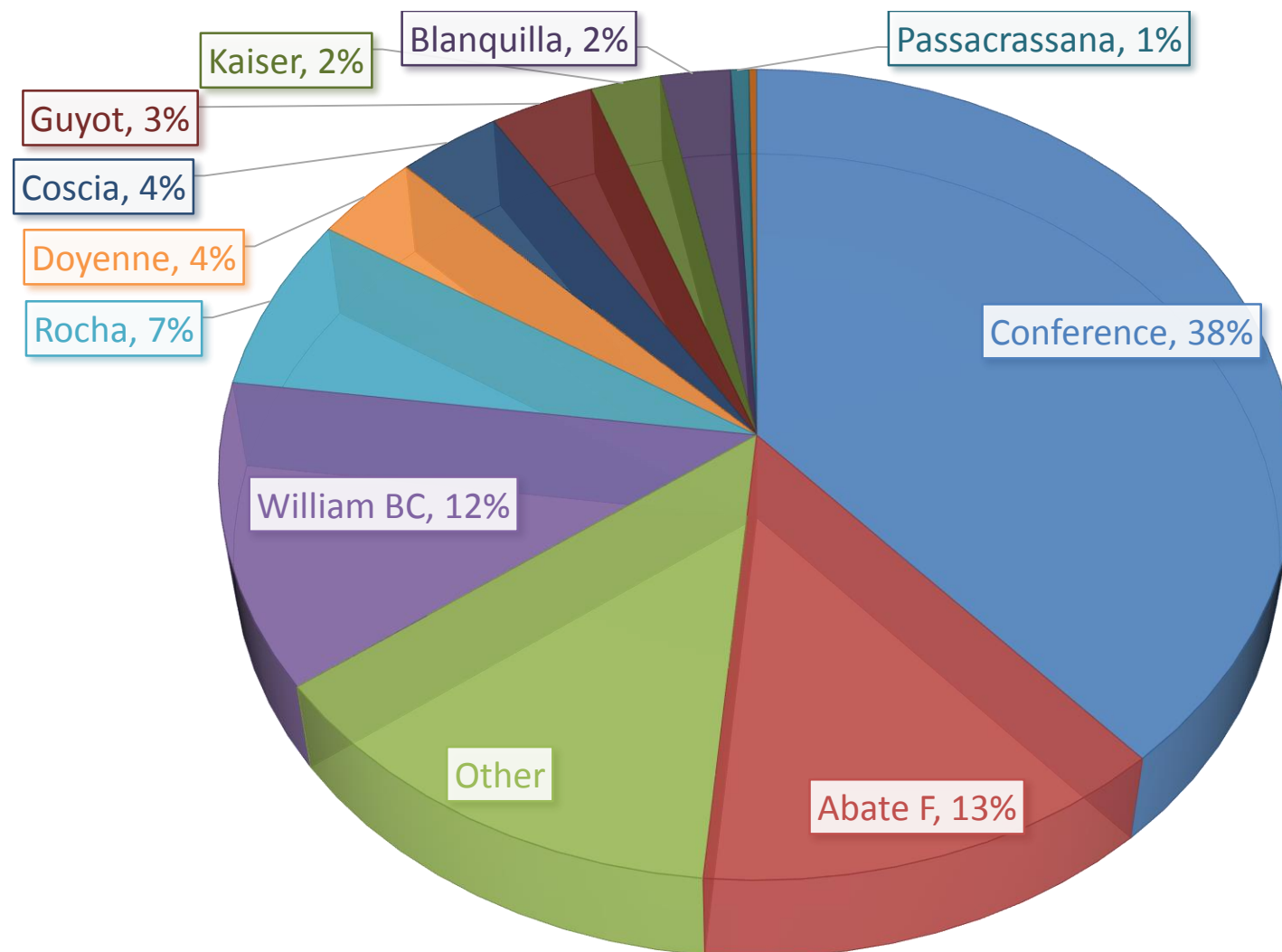


2018 crop forecast – overview by varieties



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2018 crop forecast – varieties overview



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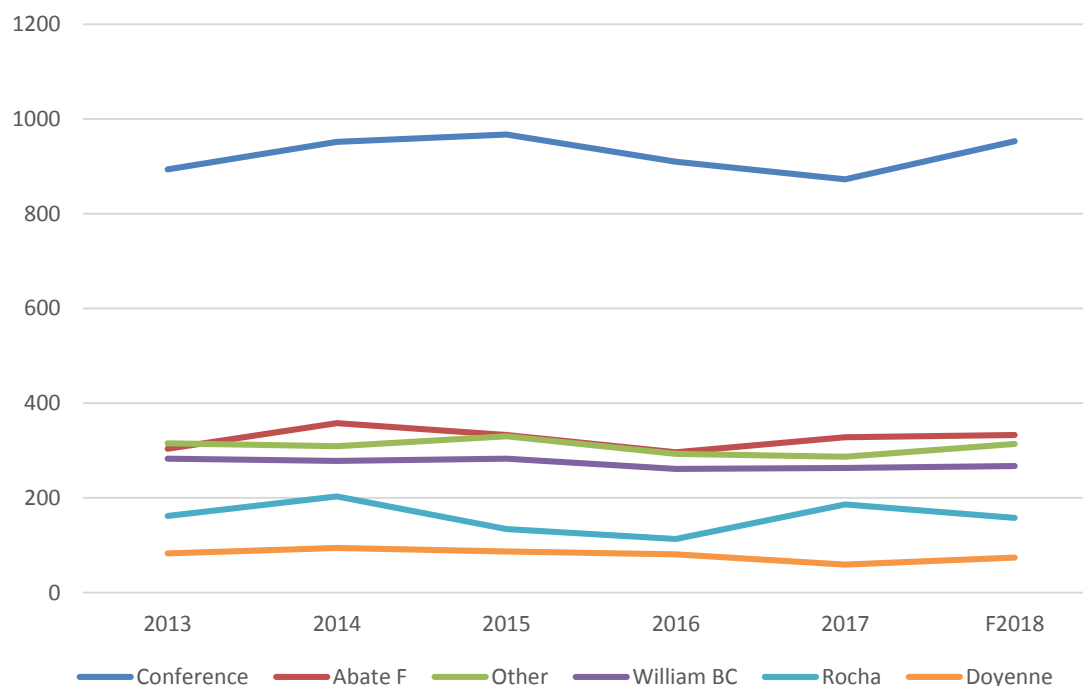
Decline:
Rocha

Increase:
Conference,
Doyenne, other

Consolidation:
Abate, William
BC

	F2018	2017	2016
Conference	953	873	910
Abate F	333	328	296
Other	314	287	293
William BC	267	263	261
Rocha	158	186	113
Doyenne	74	59	81
Coscia	70	79	67
Guyot	58	65	59
Kaiser	45	43	38
Blanquilla	41	43	40
Passacrassana	9	9	11
Durondeau	3	2	3

Conference: second largest ever with 953.000 T



Varieties yearly variation 2016/2017



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Conference
+80.000 T



Doyenne
+15.000 T



Abate
+5.000T



Williams
+4.000 T



Rocha
-28,000 T



Guyot
-7.000 T

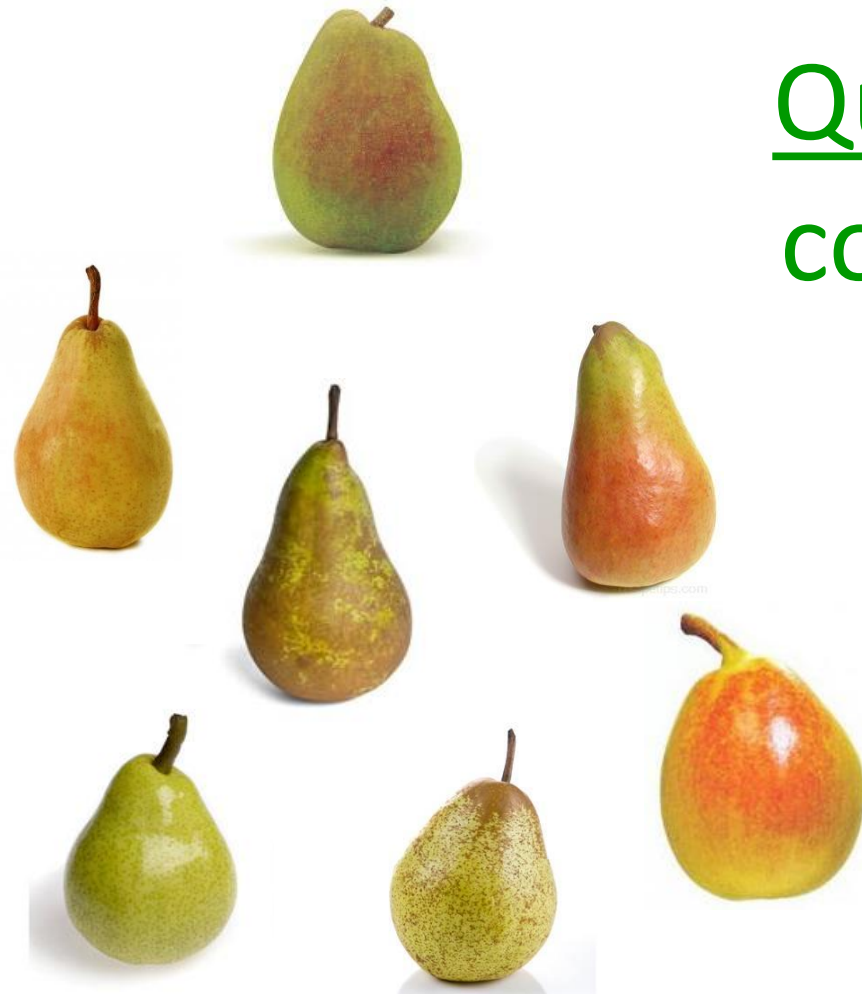


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PEAR forecast 2018

Qualitative and country review





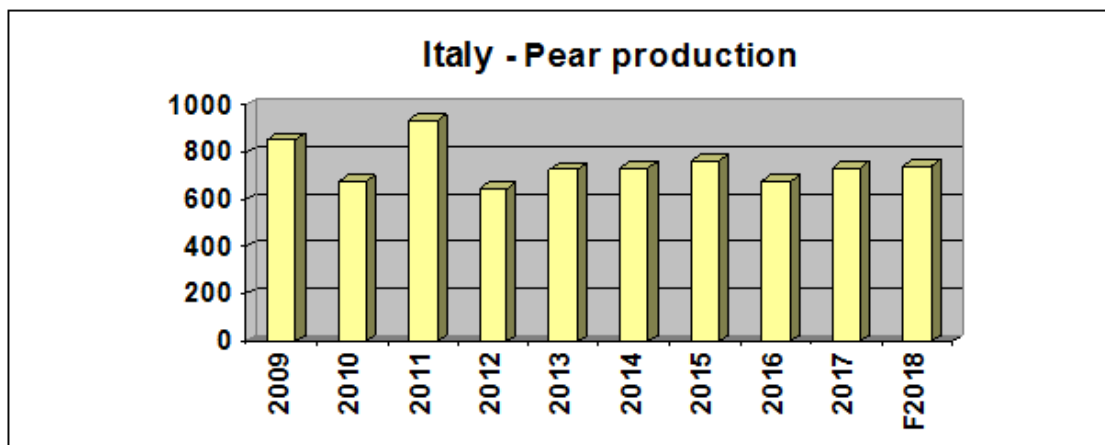
Italy 2018



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- 741.000T => stable to last year , +2 % 3Y average
- Favourable conditions, t° slightly higher in April –May, more rain than previous year
- Several hails reported but limited damages as anti hails net are widespread
- 20% of crop for processing
- Organic production is estimated at 4% (1% up to last year)
- Good size depending on next weeks' developments, color => standard
- A little bit up for Abate, slightly down for Conference due to surface decrease
- Picking similare to last average





Spain and Portugal 2018



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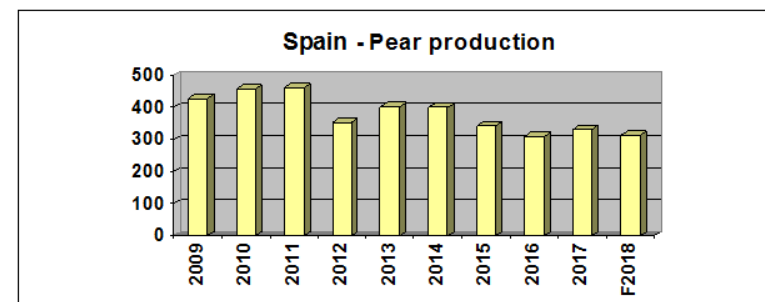
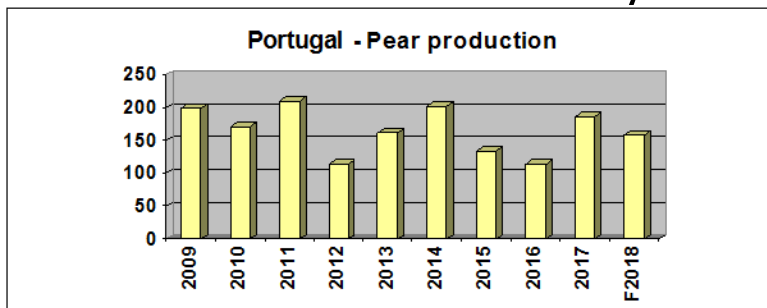
8-10 August 2018, Warsaw, Poland

Spain

- Low crop at 311 but stable in Catalunya (139.000T), down in Aragon at 48.000T
- Strong conference crop at 162.00T, other varieties down (Blanquilla; Coscia, Limonera)

Portugal

- Rainy June, but soil moisture remain less than 50%, some hail in the North interior
- Normal size
- Season to start 5 to 10 days later



Overview main “Southern MS”



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in 000 T	2018	2017
EL	57	59
IT	741	738
PT	158	186
ES	311	331
TOTAL	1267	1314
DIFF	-47	

Conference	2017	2018
IT	62	60
ES	157	163
TOTAL	219	223
DIFF		4



The Netherlands 2018

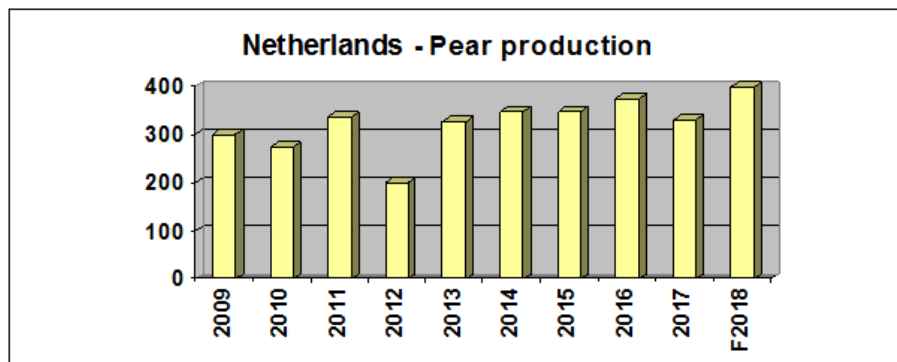


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The Netherlands

- Crop currently maintained at 398.000 T ,the largest ever, but could be reduced in the coming weeks by ca 10%
- Dominated by Conference (312.000T)
- Still increase of surface (by 4%)
- 3% crop is destined to processing
- 4% is organic
- Season few days earlier : start picking conference on 4 September
- Sweet Sensation : 10.000 T out of which 6.500 in NL and 2.500 in BE
- Harvest 2 weeks earlier





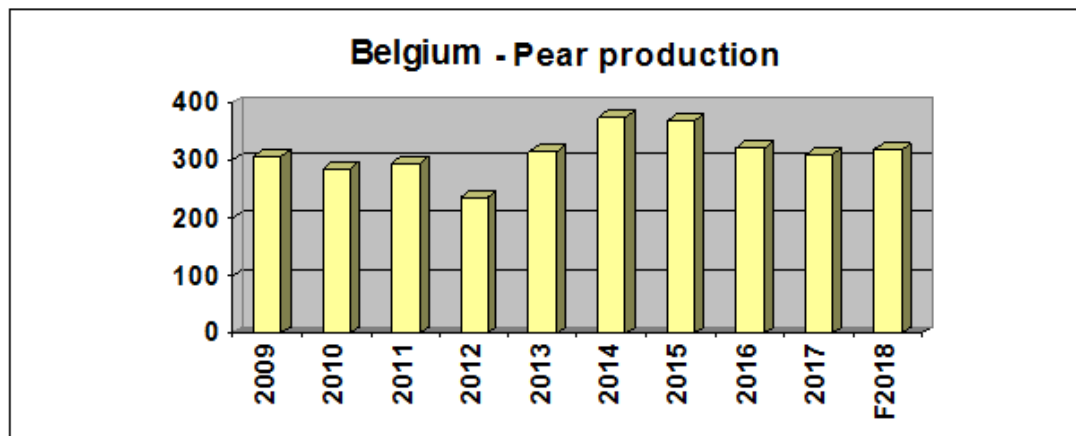
Belgium 2018



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- BE crop at 317,500 T => down from an initial early July forecast of 362,000 T: impact of climatic conditions (drought & size), conditions at blossoming and fruit setting were normal and normal physiological drop
- Conference slightly below 300.000 T at 288,000 T
- 6% to processing and 1% organic production
- Orchard HA increased by 150 HA at 10.185 HA
- Flowering ended 10 days before. Crop around 14 days than average , 7-10 days compared to last year
- Fruit size expected to be 1 size smaller
- Picking as of 25 August



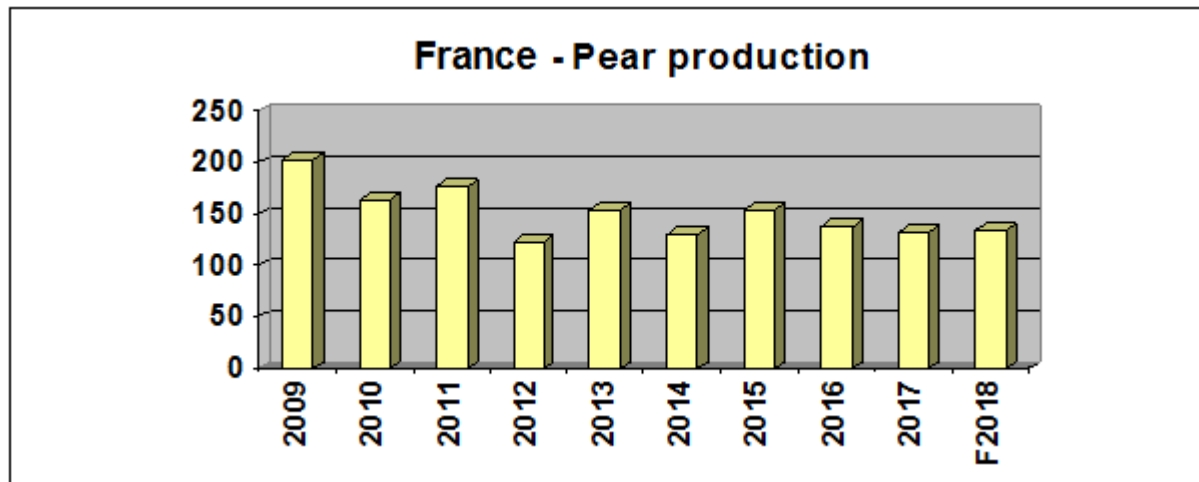
France 2018



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- Small crop at 135.000T, normal growing conditions, but quiet rainy during blossoming & heat wave since June
- Orchard equally splitted between Conference, Guyot and William



Overview main “Northern MS”



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In 000 T	2017	2018
BE	310	318
FR	133	135
DE	31	35
NL	330	398
PL	40	70
TOTAL	844	956
Diff		112

Conference	2017	2018
BE	294	289
FR	26	31
DE	7	8
NL	262	312
PL	35	60
TOTAL	624	700
Diff		76

Organic pears in the EU



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ORGANIC	2017	2018
RO	0,6	1,02
DE	1,15	1,55
HU	1,05	1,14
CR	0,06	0,07
GR	1,77	1,71
BE	3,1	3,18
NL	13,2	15,92
IT	22,14	29,64
TOTAL	43,07	54,23

Data in 000 T

- Data covering 82% of the production (1,9 Mio T out of 2,3 Mio)
- Organic production is 2,8%

Processing pears



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PROCESSING	2017	2018
RO	2,16	3,91
DE	6,9	9,3
HU	7	7,6
CR	0,6	0,7
GR	2,95	2,85
BE	12,4	19,08
NL	9,9	11,94
IT	154,98	148,2
TOTAL	196,89	203,58

Data in 000 T

- Data covering 82% of the production (1,9 Mio T out of 2,3 Mio)
- Processing represent 10,5% of production

Pears & Brexit



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29 March 2019

EU 27 monthly pears trading
with the UK



TOTAL EU	135,000
Netherlands	88,000
Belgium	28,500
Portugal	9,000
Germany	3,000
Italy	3,000
France	2,000



Switzerland



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Switzerland

x 1000 tons

Variety	2009	2010	2011	2012	2013	2014	2015	2016	2017	F2018	(1)	(2)
Conference	6	3	5	4	4	5	4	4	3	5	76	42
Kaiser	9	5	8	6	6	8	7	5	2	9	296	95
William BC	7	5	6	4	6	6	6	4	3	5	59	14
Other	9	5	7	6	6	7	6	9	3	7	104	7
Total	31	18	26	20	22	26	23	23	12	26	124	37

Switzerland

(1) Percentage difference between F2018 and 2017

(2) Percentage difference between F2018 and the average of 2015- 2016- 2017



USA



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USA

x 1000 tons

<i>Variety</i>	<i>2009</i>	<i>2010</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>F2018</i>	<i>(1)</i>	<i>(2)</i>
Anjou	222	202	228	205	232	224	194	166	169	187	10	6
Bartletts / William B	378	361	371	356	363	336	347	333	303	294	-3	-10
Bosc	69	61	82	65	75	62	70	70	53	70	30	8
Doyenne du Comice	6	6	6	5	6	5	4	6	3	4	26	-4
Red Anjou	19	19	19	20	22	22	19	20	20	21	7	8
Seckel	1	2	2	1	1	1	1	1	1	1	11	2
Other Reds	1	0	1	1	7	8	10	9	8	9	4	-5
Other Varieties	11	9	12	13	6	5	3	4	3	4	24	8
Total USA:	707	660	720	666	711	663	648	608	561	589	5	-3

Currently revised upwards

Southern Hemisphere



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Pear Production by country

x 1000 tons

Country	2010	2011	2012	2013	2014	2015	2016	2017	F2018	(1)	(2)
Argentina	770	843	801	863	794	810	630	611	428	-30	-37
Australia	107	130	124	129	107	104	100	102	116	14	14
Chile	170	194	189	200	170	188	177	149	141	-5	-18
New Zealand	11	11	9	12	10	12	12	11	12	9	3
South Africa	356	360	361	379	399	415	432	436	420	-4	-2
Total	1.414	1.538	1.484	1.583	1.480	1.529	1.351	1.309	1.117	-15	-20

Closing remarks



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Closing remarks and parameters for the season



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- ✓ Crop ranking 5th of the decade, could be revised downwards by the Netherlands (up to 40.000 T)
- ✓ Balance volume from the North to the South
 - ✓ => main suppliers from the “North” (NL, BE, DE, FR) ca 82.000 T more
 - ✓ =>main “Southern “ suppliers (ES, PT, IT) 47.000 T less
- ✓ On-going repositioning after the Russia embargo and impact of Brexit as of March, 29

More analysis of the market by Helwig Schwartz



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Thank you for your attention

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