

European Pear Crop 2019

A quantitative and qualitative review

Helene Deruwe – WAPA



Presentation structure

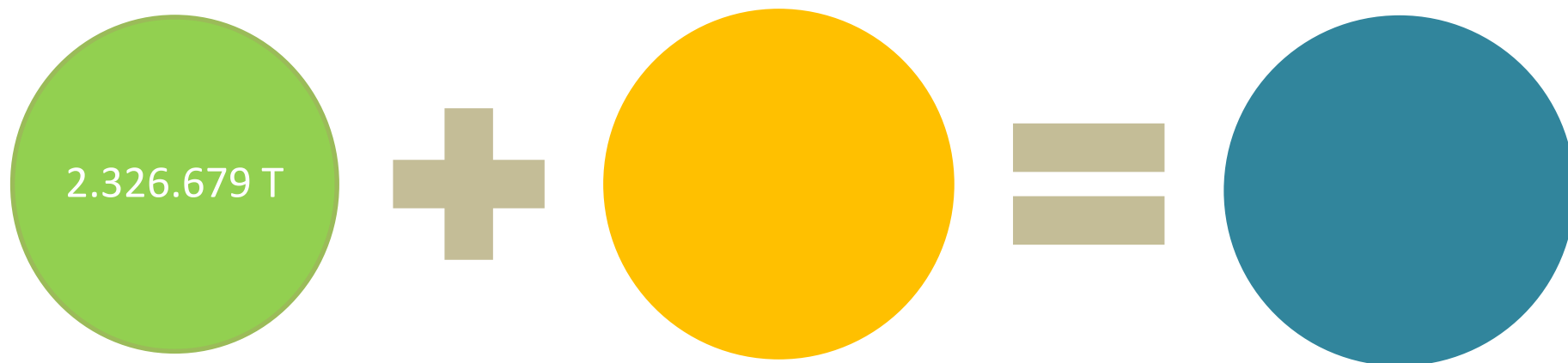
1. Validation 2018 data
2. Trade perspective
3. Pear orchard review
4. NH Pear forecast 2019: quantitative approach
5. NH Pear forecast 2019: qualitative approach
6. Beyond the EU
7. Closing remarks



1. Validation 2018 data

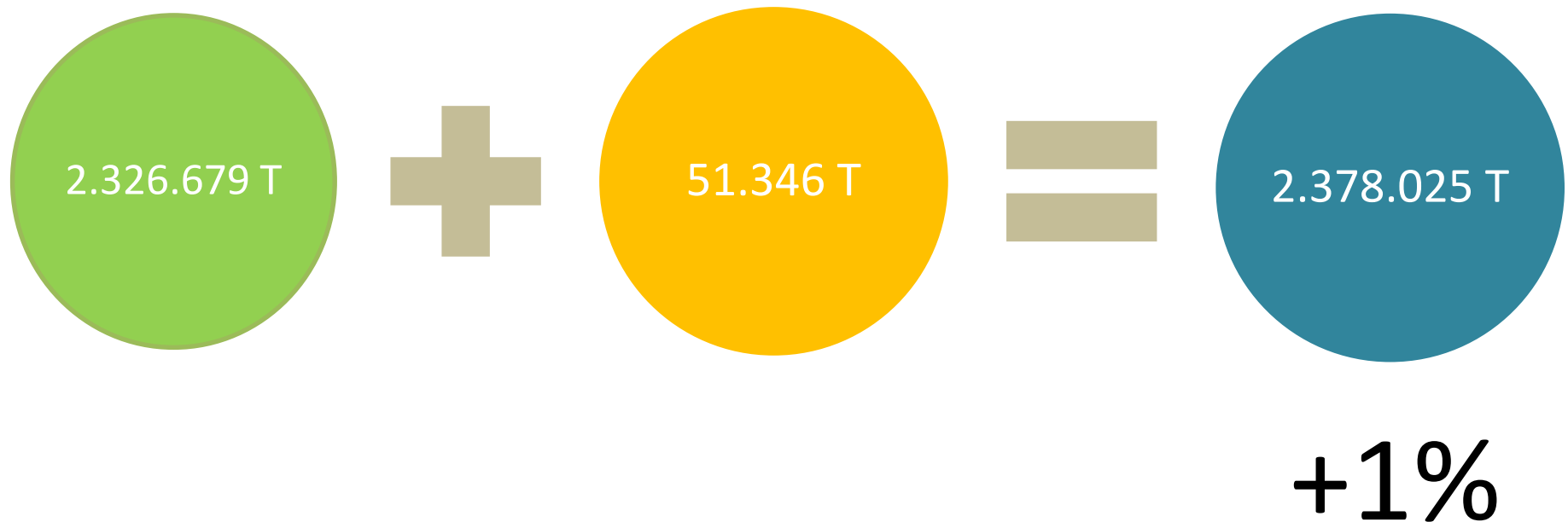


Consolidated 2018 crop



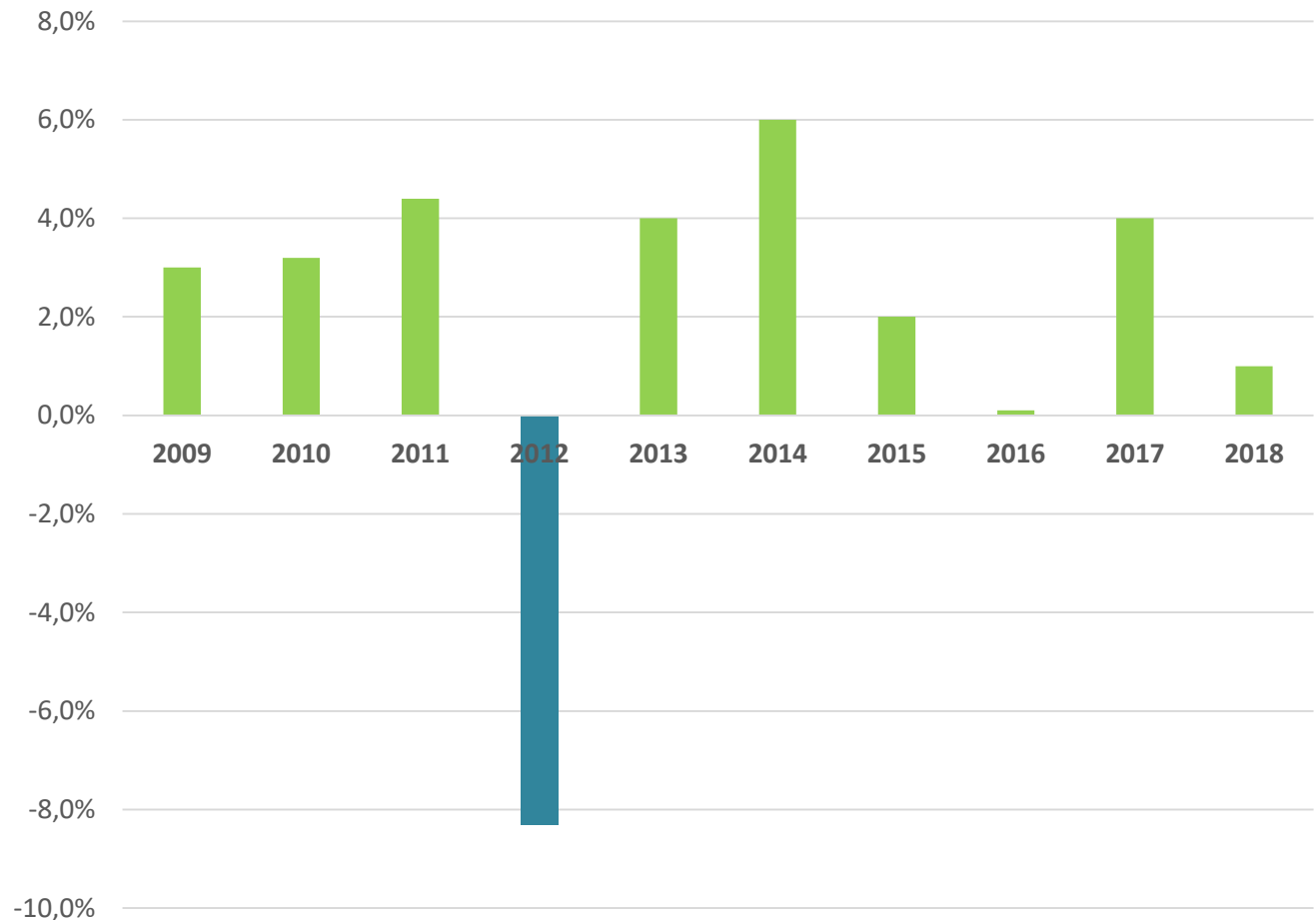
Source: Prognosfruit

Consolidated 2018 crop



Source: Prognosfruit

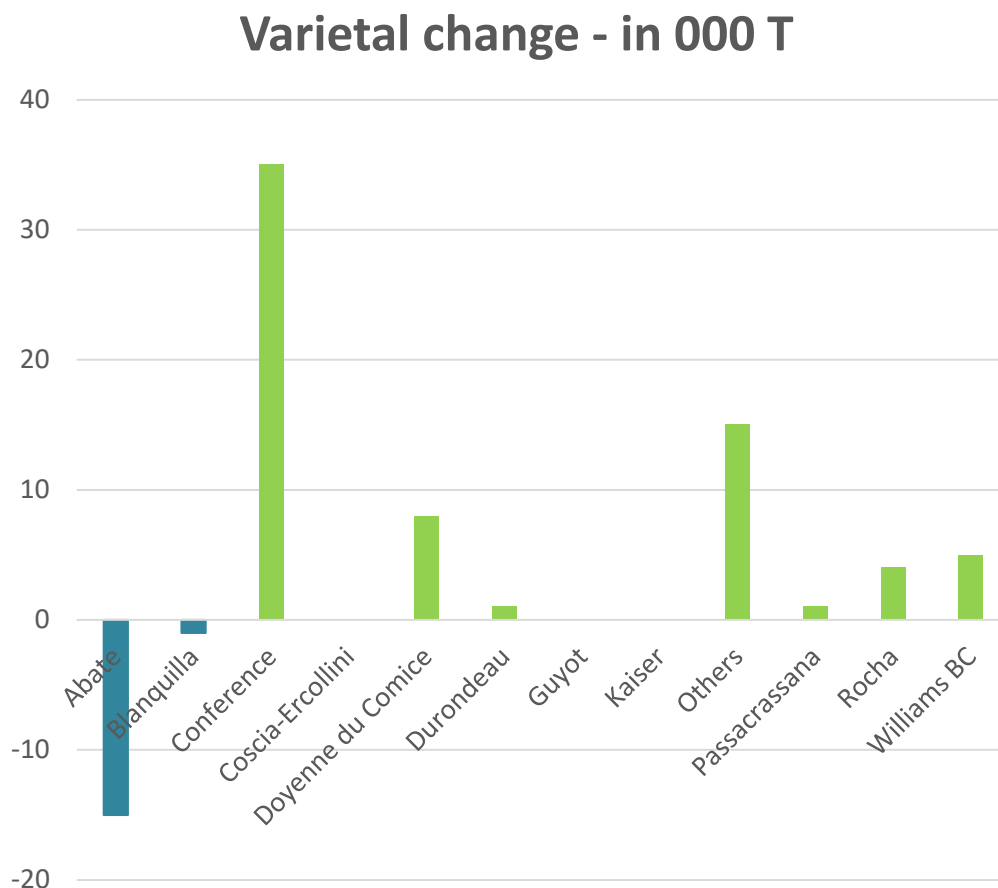
Forecast & consolidation



Source: Prognosfruit

Forecast & consolidation

Varieties	% var
Abate	-5%
Blanquilla	-2%
Conference	4%
Coscia-Ercollini	0%
Doyenne du Comice	11%
Durondeau	33%
Guyot	0%
Kaiser	0%
Others	5%
Passacrassana	11%
Rocha	3%
Williams BC	2%

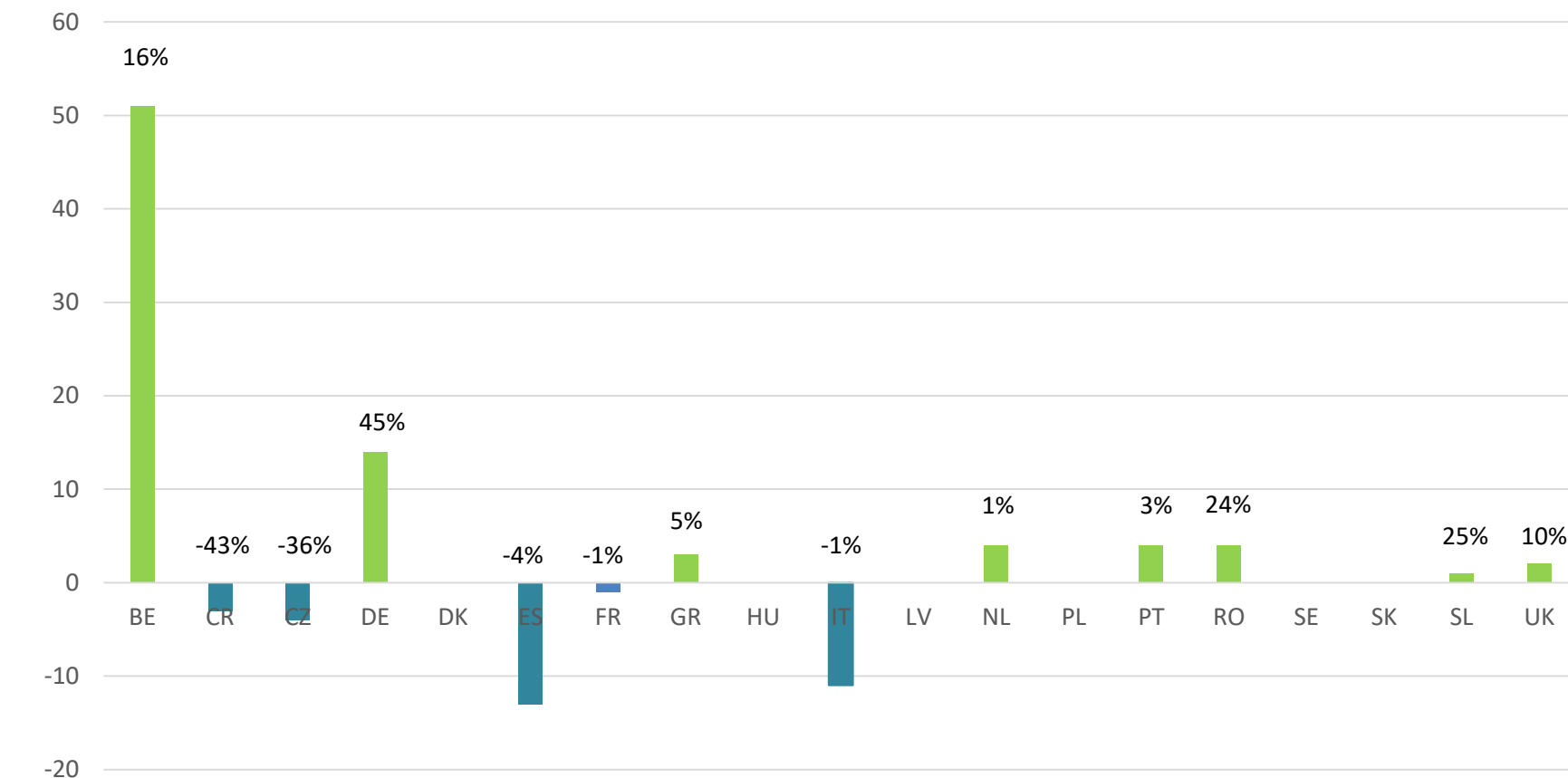


Source: Prognosfruit

Total 51.346 T difference (1% increase variation)

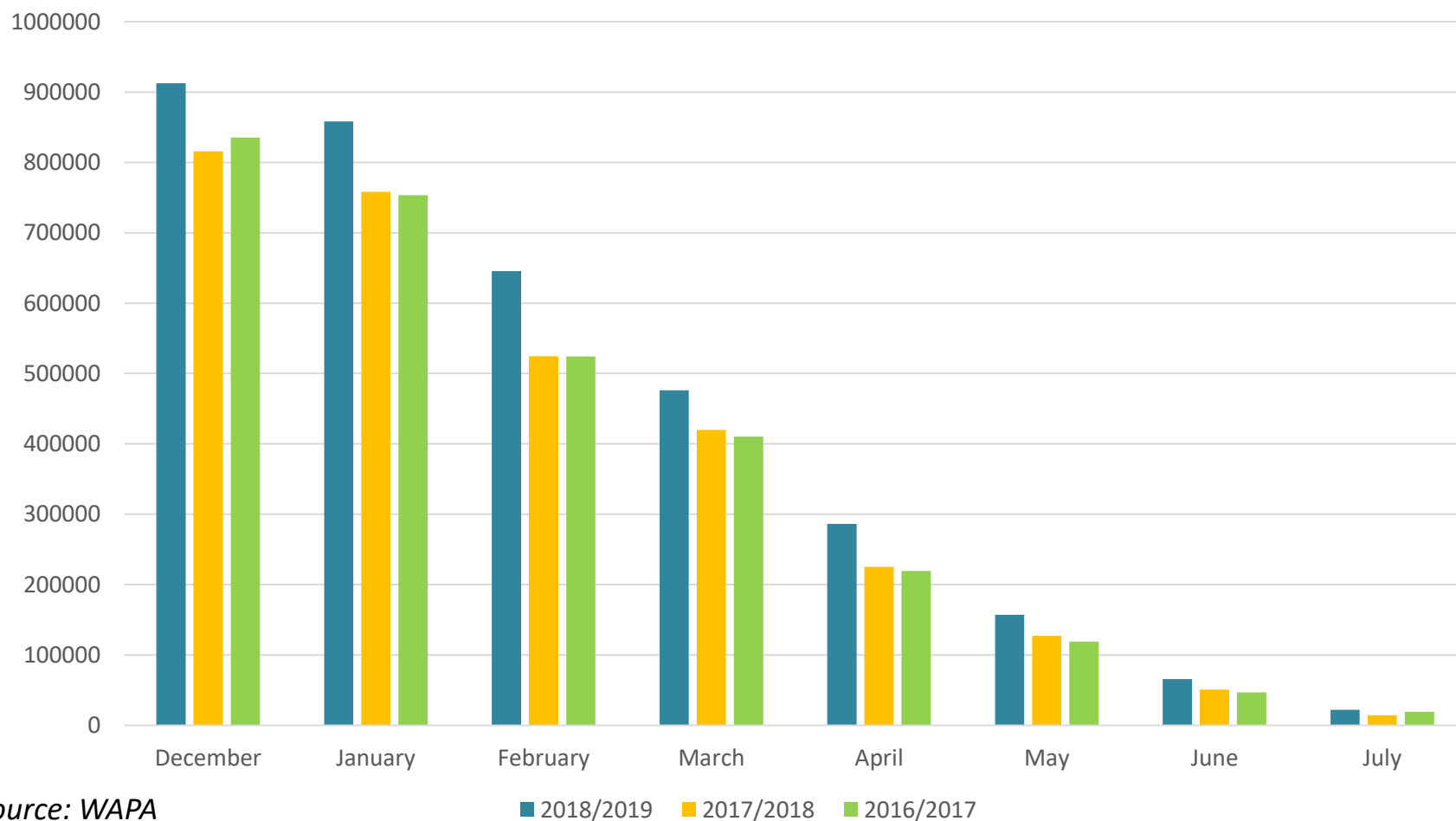
Forecast & consolidation

Change per country - in 000T



Source: Prognosfruit

Pear stock depletion

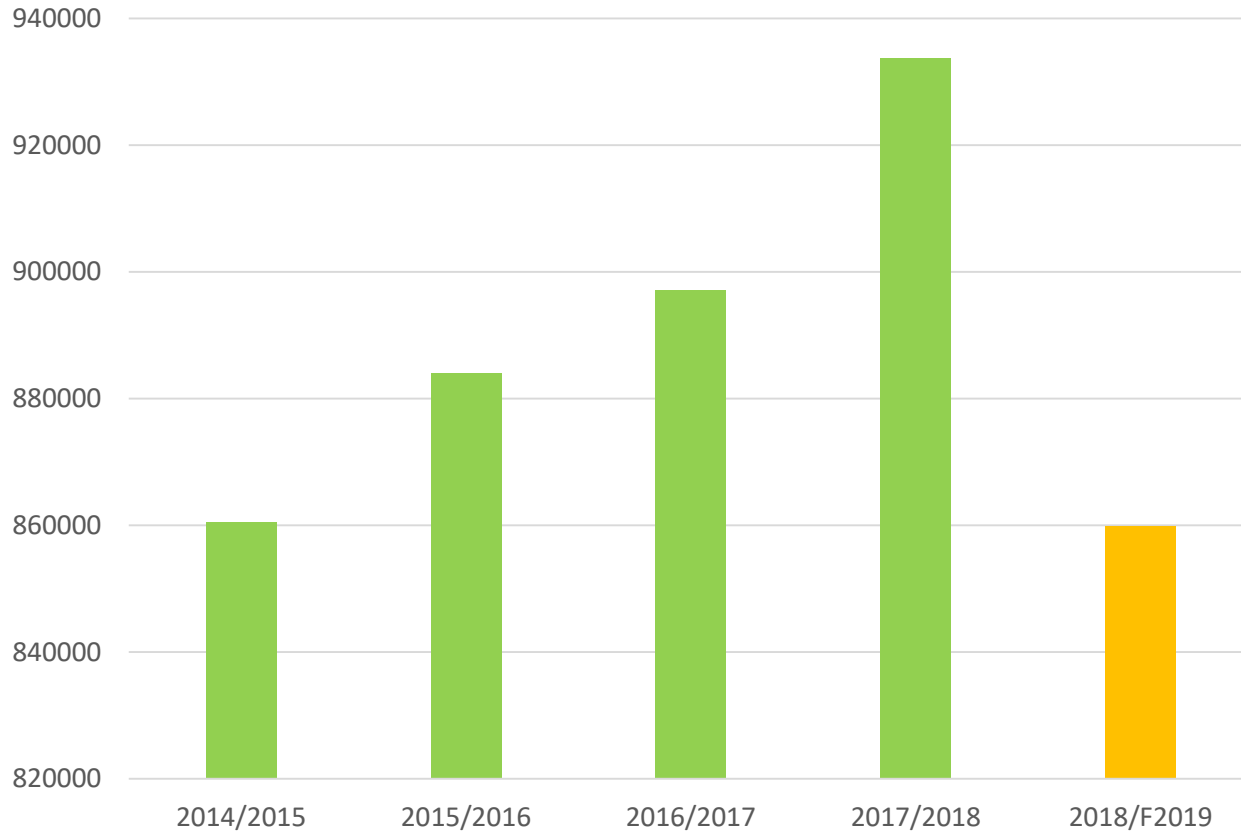


2. Trade perspective



Trade perspective

Total EU Intra trade



Source: Freshfel QlikFresh/Eurostat

Projection of the trade data for May-Aug 2019 based on the average of the trade flows for May-Aug of the last 4 years

Trade perspective

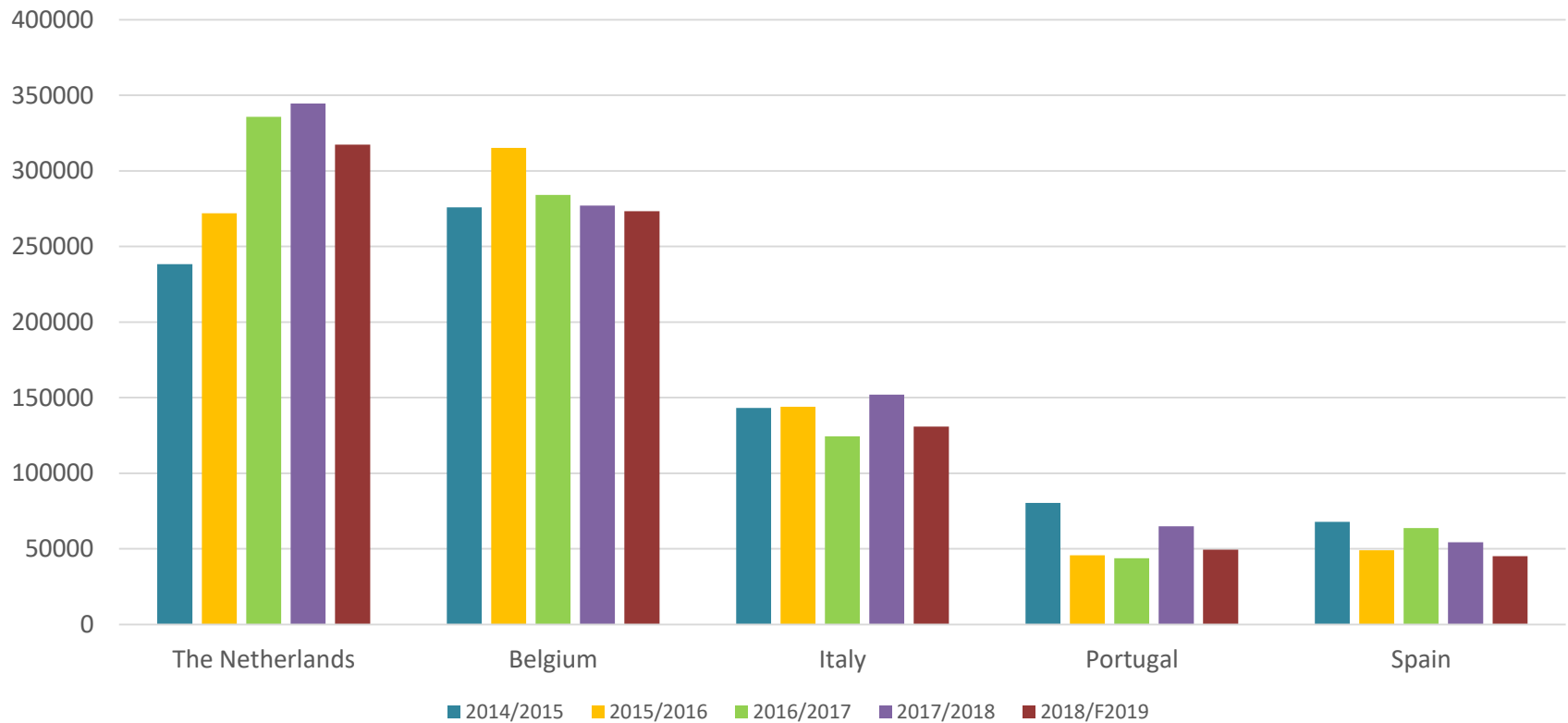
EU Intra trade top 10 (by shipper)

	2014/2015	2015/2016	2016/2017	2017/2018	2018/F2019
The Netherlands	238.251	272.019	335.732	344.595	317.450
Belgium	275.909	315.322	284.202	277.069	273.425
Italy	143.167	144.067	124.478	152.097	130.807
Portugal	803.78	45.846	43.800	64.936	49.402
Spain	67.844	48.988	63.723	54.398	45.249
France	20.531	18.389	12.926	9.895	11.914
Germany	13.564	9.997	10.851	10.017	11.257
Poland	7.188	13.270	8.175	4.006	5.932
Greece	2.146	2.895	3.082	5.088	3.445
Latvia	3.195	3.046	1.725	2.072	2.451

Source: Freshfel QlikFresh/Eurostat

Trade perspective

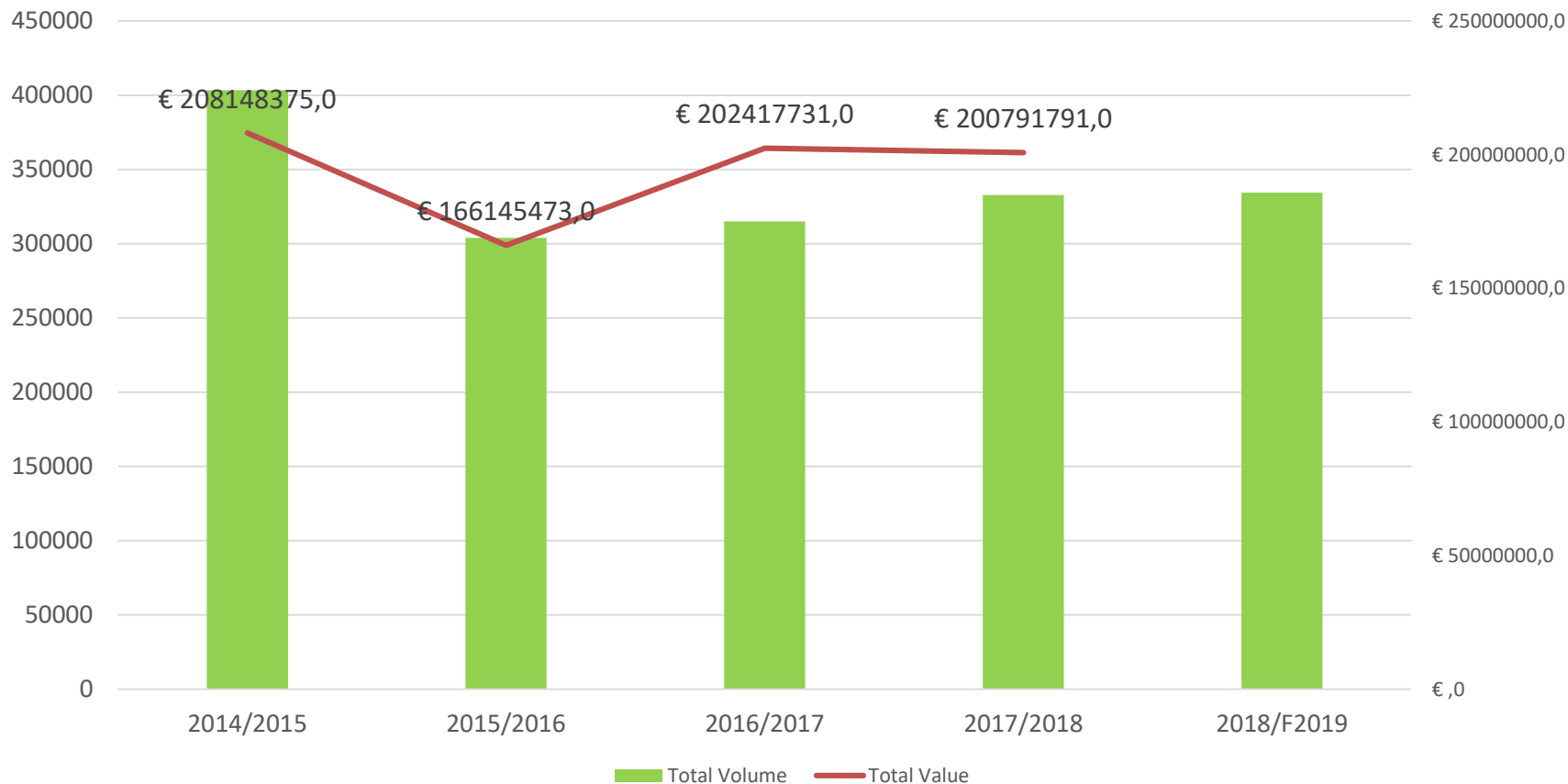
EU Intra trade top 5 (by shipper)



Source: Freshfel QlikFresh/Eurostat

Trade perspective

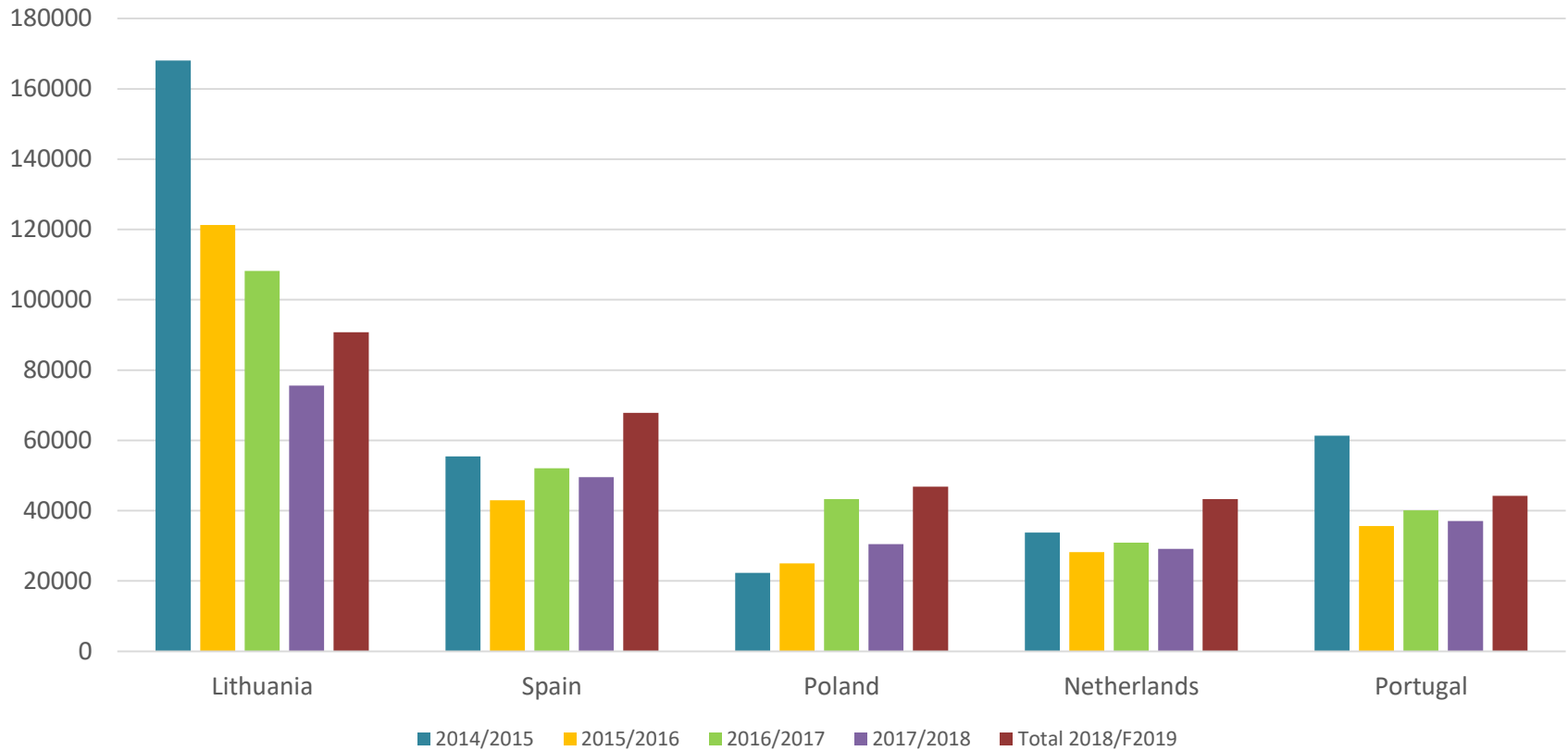
Total EU export - In T and €



Source: Freshfel QlikFresh/Eurostat

Trade perspective

EU exporter Top 5



Source: Freshfel QlikFresh/Eurostat

Trade perspective

EU exporter top 10

	2014/2015	2015/2016	2016/2017	2017/2018	2018/F2019
Lithuania	168.051	121.251	108.218	75.573	90.723
Spain	55.469	42.985	52.077	49.550	67.796
Poland	22.290	24.964	43.295	30.482	46.826
The Netherlands	33.803	28.196	30.921	29.158	43.308
Portugal	61.309	35.644	40.052	37.076	44.254
Belgium	32.088	29.508	23.829	21.071	18.390
Italy	20.150	13.924	9.170	11.110	11.459
Slovenia	4.135	2.387	2.191	3.371	5.266
Greece	2.544	2.653	2.410	2.537	3.301
Croatia	588	375	770	539	915



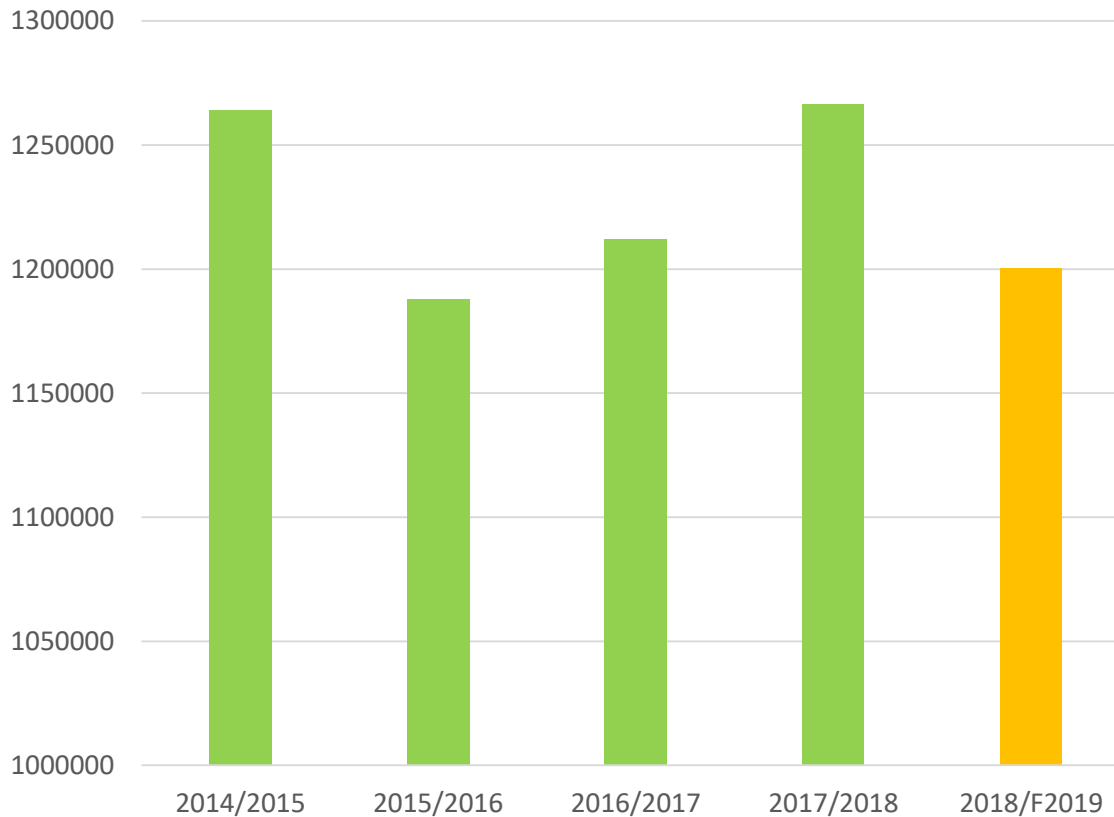
Destination top 10

	2018
Belarus	122801
Brazil	47070
Morocco	36236
Norway	16583
Kazakhstan	11196
Bosnia and Herzegovina	10831
Switzerland	10486
China	6233
Saudi Arabia	4604
Israel	4280

Source: Freshfel QlikFresh/Eurostat

Trade perspective

EU pear trade (Intra and export)

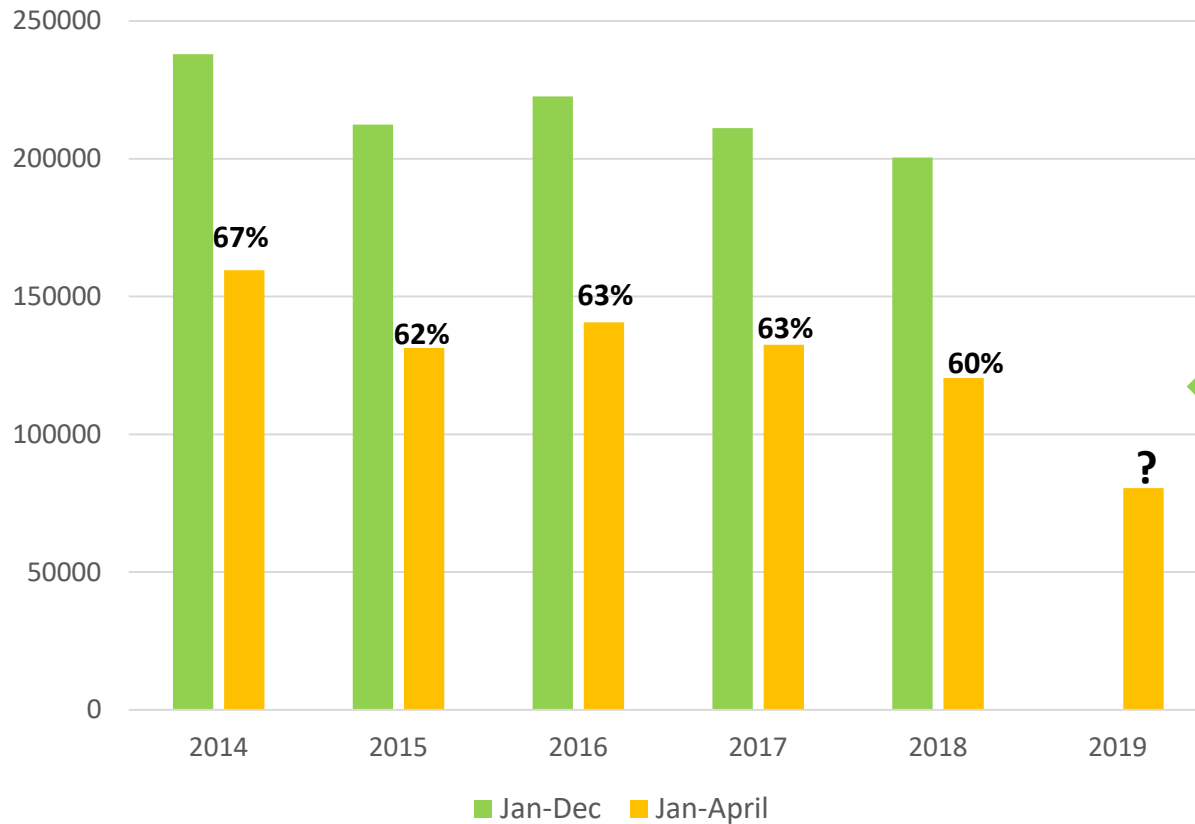


Source: Freshfel QlikFresh/Eurostat

Projection of the trade data for May-Aug 2019 based on the average of the trade flows for May-Aug of the last 4 years

Trade perspective

EU import trend



Origin top 10

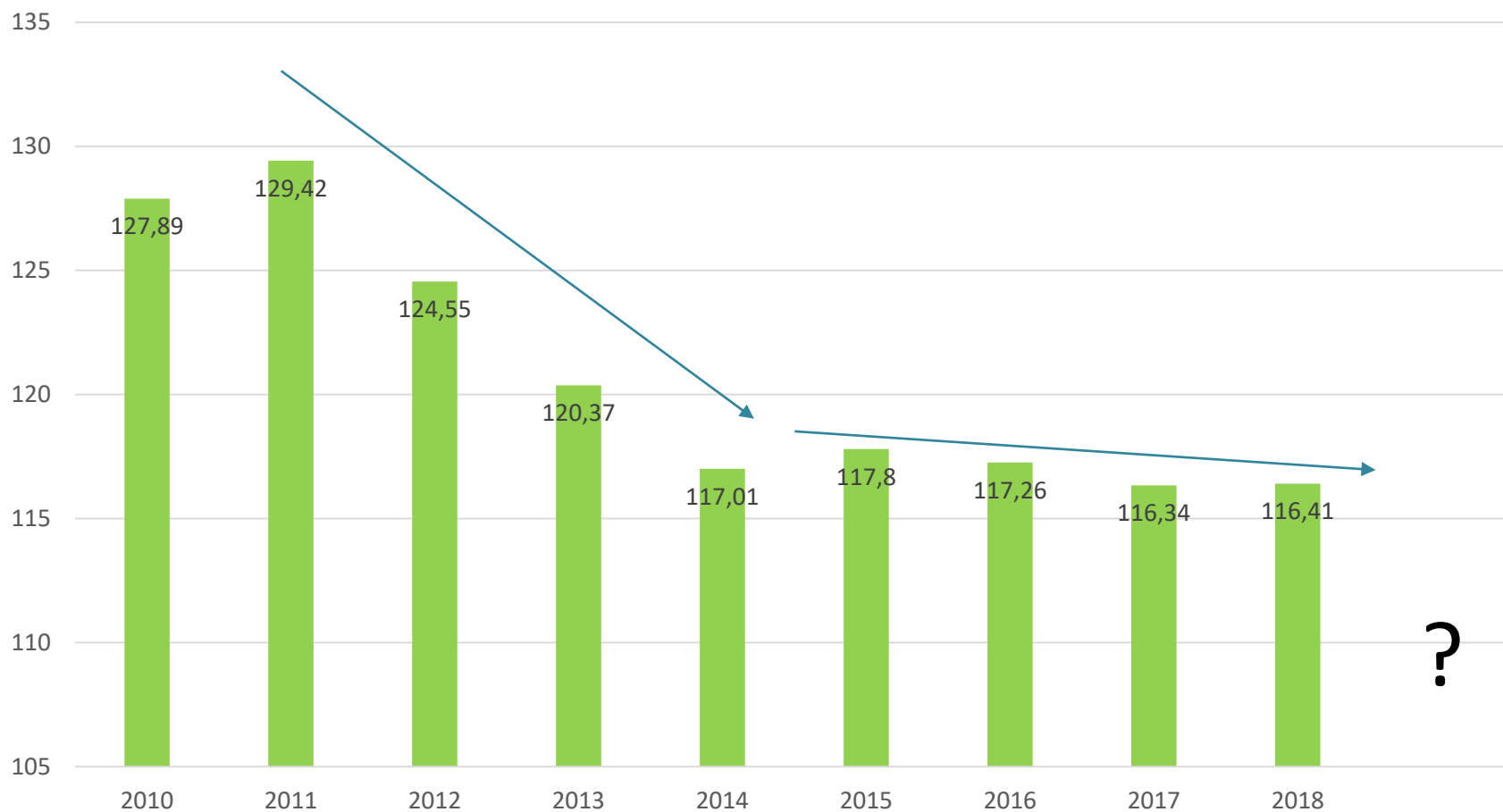
	2018
South Africa	76.043
Argentina	54.253
Chile	45.694
China	13.003
Turkey	6.958

Source: Freshfel QlikFresh/Eurostat

3. Pear orchard review

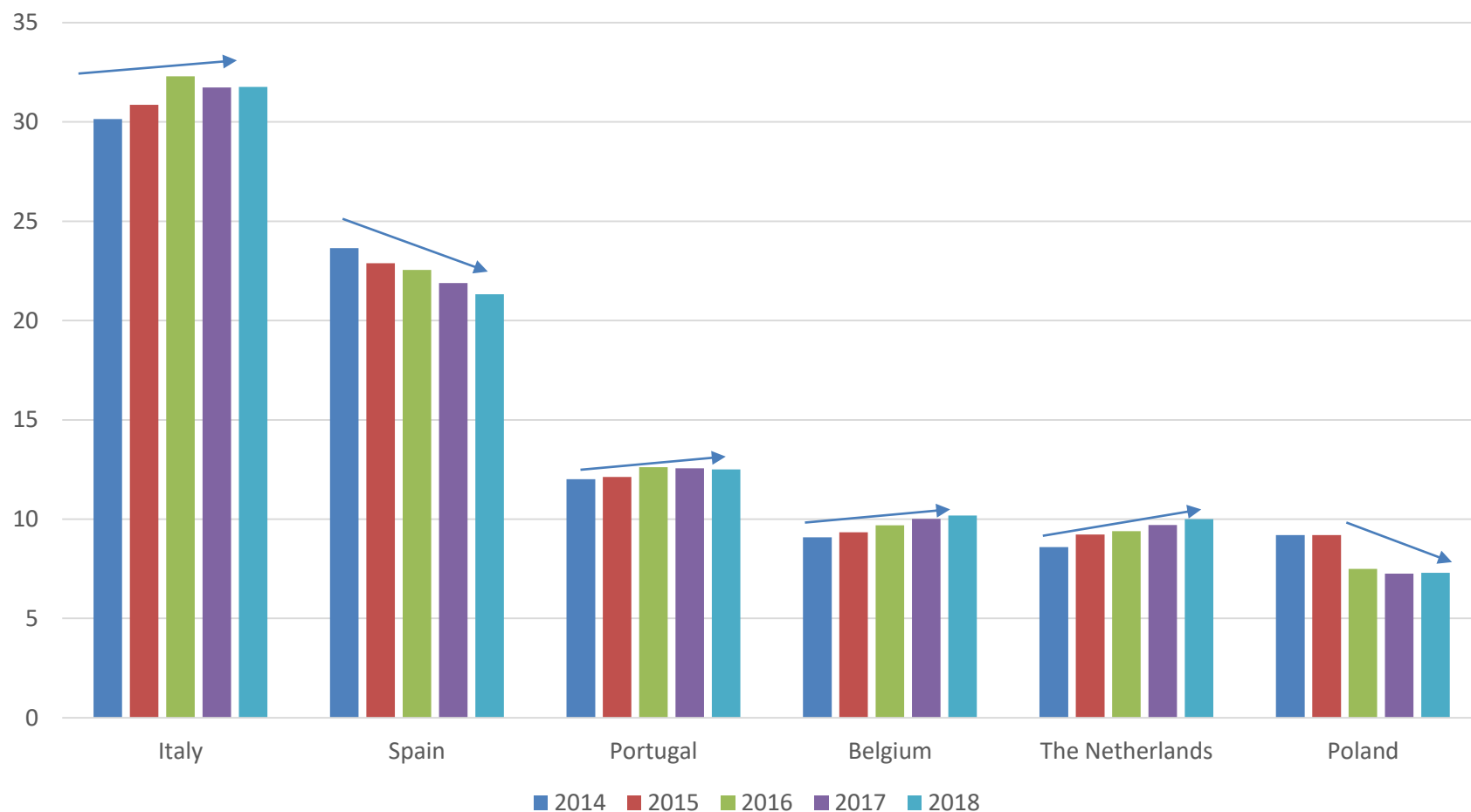


Total EU surface (Ha)



Source: Eurostat

Surface per key MS (Ha)



Source: Eurostat

4. NH Pear forecast 2019: quantitative approach by country



EU pear forecast 2019

2019
forecast

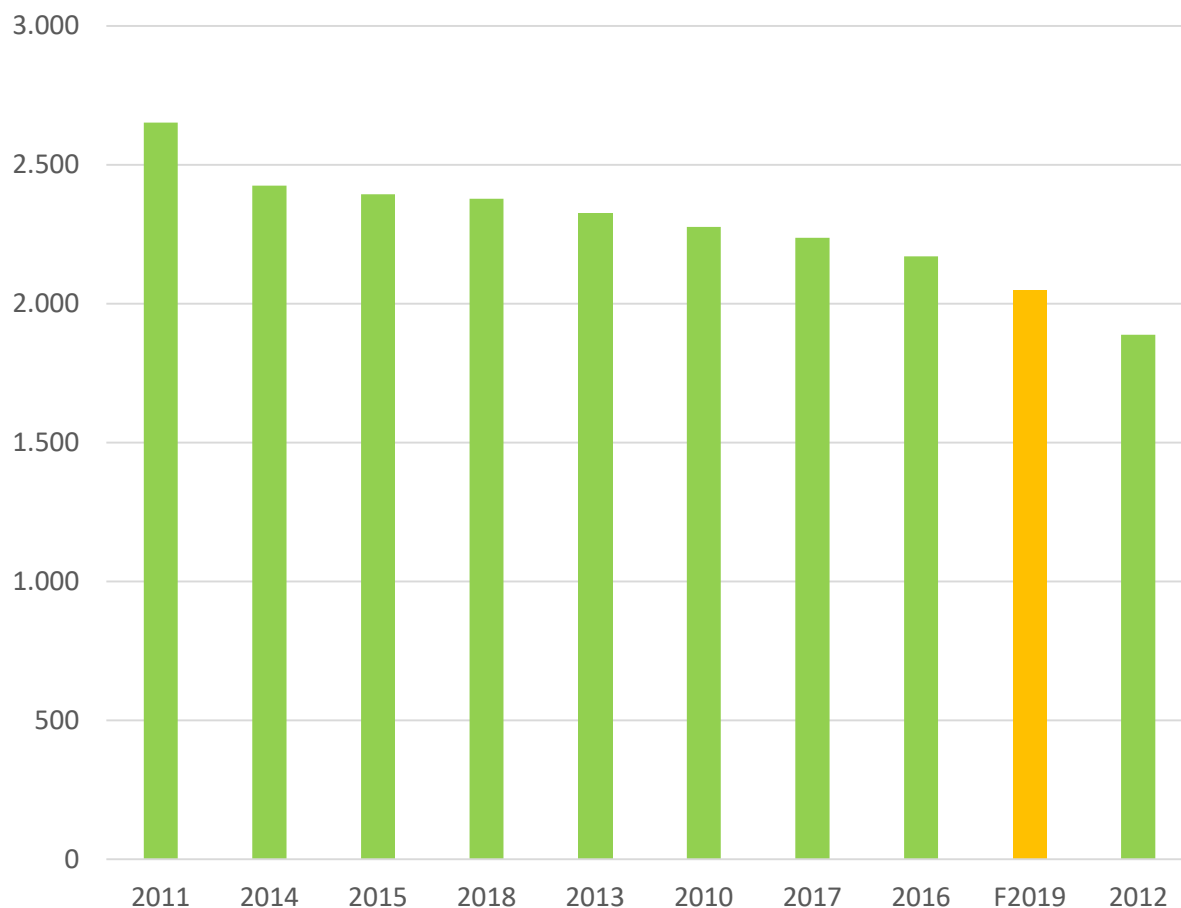
2.047.323 T

2nd lowest
in the
decade

19 Member
States
contributions

Source: Prognosfruit

EU pear forecast 2019



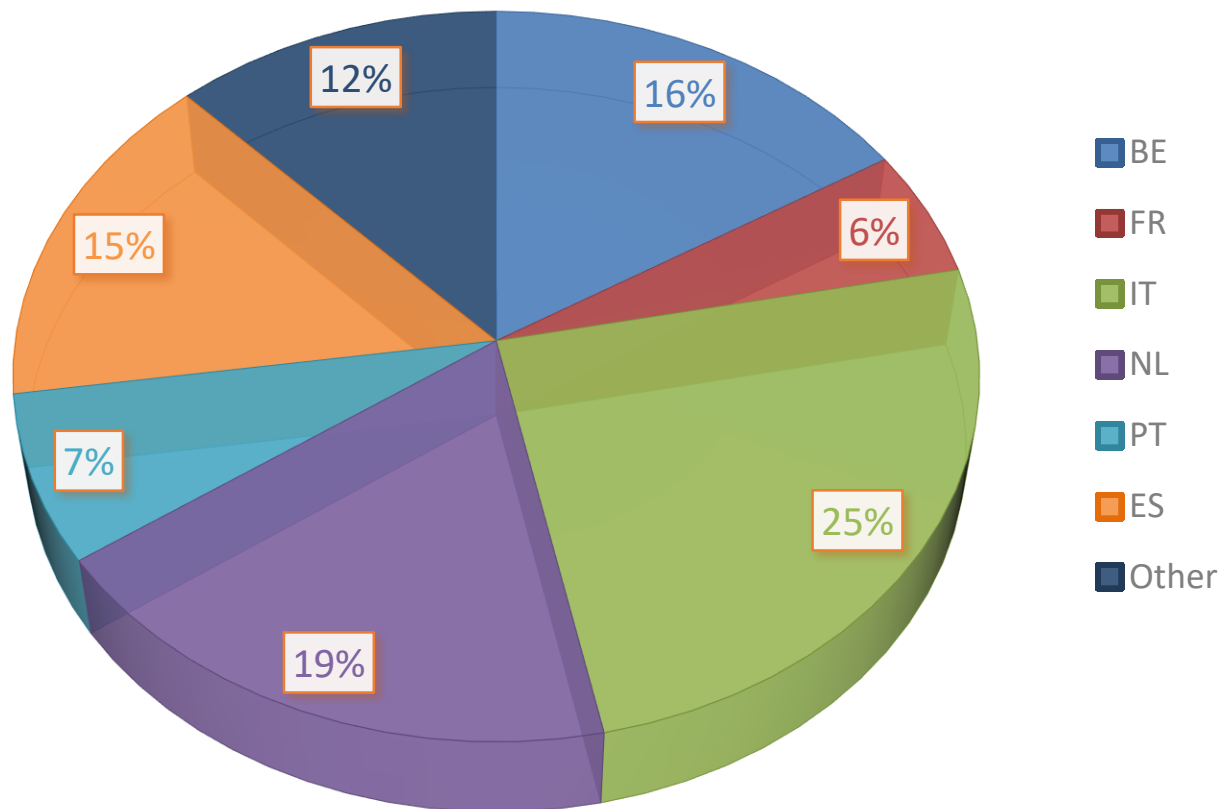
Source: Prognosfruit

	Year	'000 T
1	2011	2,652
2	2014	2,425
3	2015	2,394
4	2018	2,378
5	2013	2,327
6	2010	2,276
7	2017	2,237
8	2016	2,171
9	F2019	2,047
10	2012	1,888

Y2019 in perspective

2,280	AV10Y	-11,2%
2,245	AV5Y	-11,8%
2,221	AV3Y	-9,5%
2,213	AV2018	-13,9%

EU pear forecast 2019



TOP 6 : IT-NL-BE-ES-PT-FR = 88 % of the EU production

Source: Prognosfruit

EU pear forecast 2019

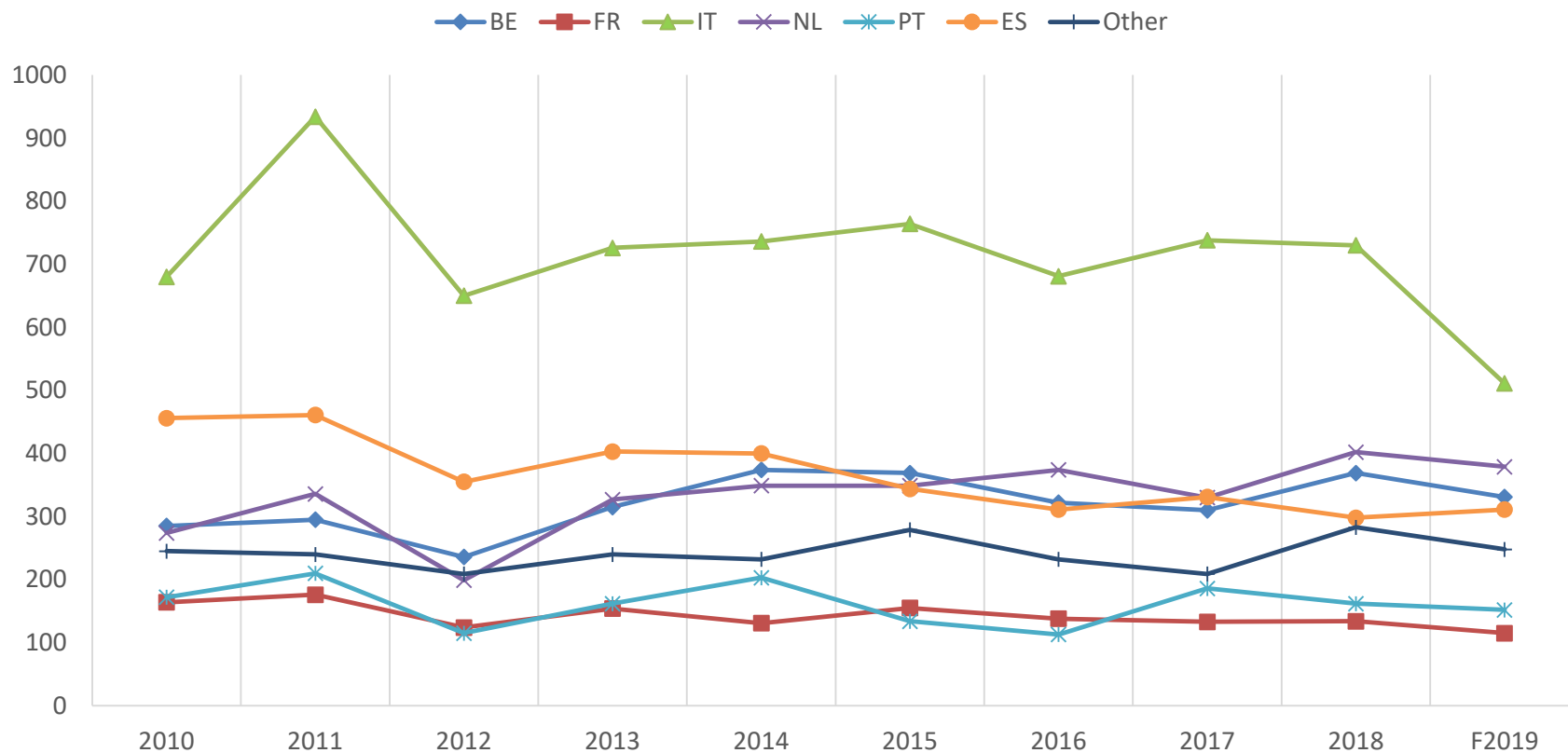
x 1000 tons

	Country	2010	2011	2012	2013	2014	2015	2016	2017	2018	F2019	(1)	(2)
→	Belgium	285	295	236	315	374	369	322	310	369	331	-10	-1
	Croatia	6	6	2	3	2	2	1	6	4	3	-38	-29
	Czech Rep	3	3	6	7	4	10	7	4	7	7	-4	15
	Denmark	6	5	5	6	6	6	6	5	6	4	-33	-29
→	France	164	176	124	154	131	155	138	133	134	115	-14	-15
	Germany	39	47	34	34	45	43	35	23	45	37	-18	8
	Greece	54	36	42	32	37	60	47	59	60	55	-8	-1
	Hungary	36	21	25	36	40	33	38	35	38	32	-17	-14
→	Italy	680	934	650	726	736	764	681	738	730	511	-30	-29
	Latvia	0	0	0	0	1	0	0	0	0	0	-17	-14
→	Netherlands	274	336	199	327	349	349	374	330	402	379	-6	3
	Poland	40	55	45	65	50	80	55	40	70	70	0	27
→	Portugal	172	210	115	162	203	134	113	186	162	152	-6	-1
	Romania	20	28	19	24	17	13	16	12	21	17	-20	1
	Slovakia	1	1	0	1	0	1	0	1	1	1	-19	26
	Slovenia	6	4	3	3	4	4	1	0	5	1	-72	-35
→	Spain	456	461	355	403	400	344	311	331	298	311	4	-1
	Sweden	1	2	1	1	1	1	1	1	2	1	-50	-17
	UK	33	32	28	26	25	25	24	23	23	20	-13	-14
	Total:	2,276	2,652	1,888	2,327	2,425	2,394	2,171	2,237	2,378	2,047	-14	-9

Source: Prognosfruit

EU pear forecast 2019

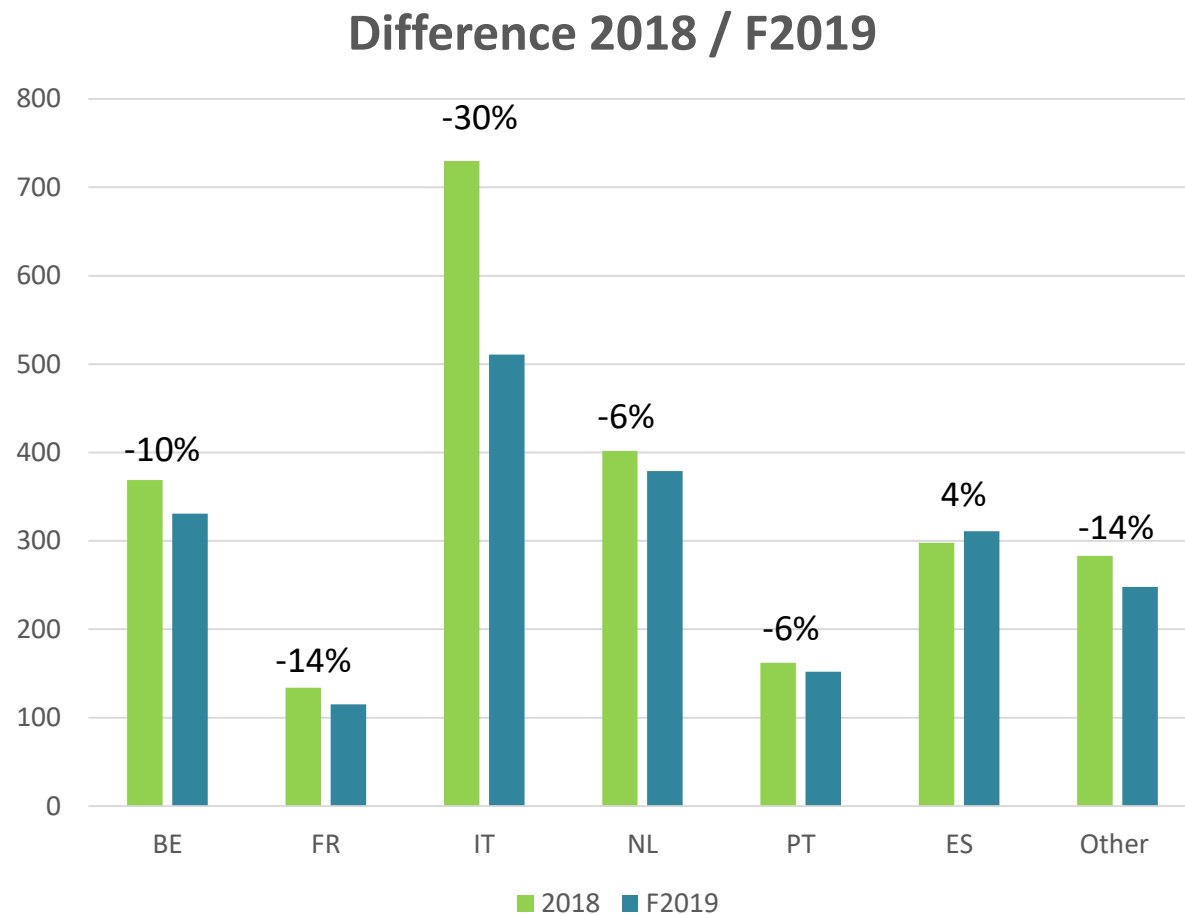
Main Producer trends



Source: Prognosfruit

EU pear forecast 2019

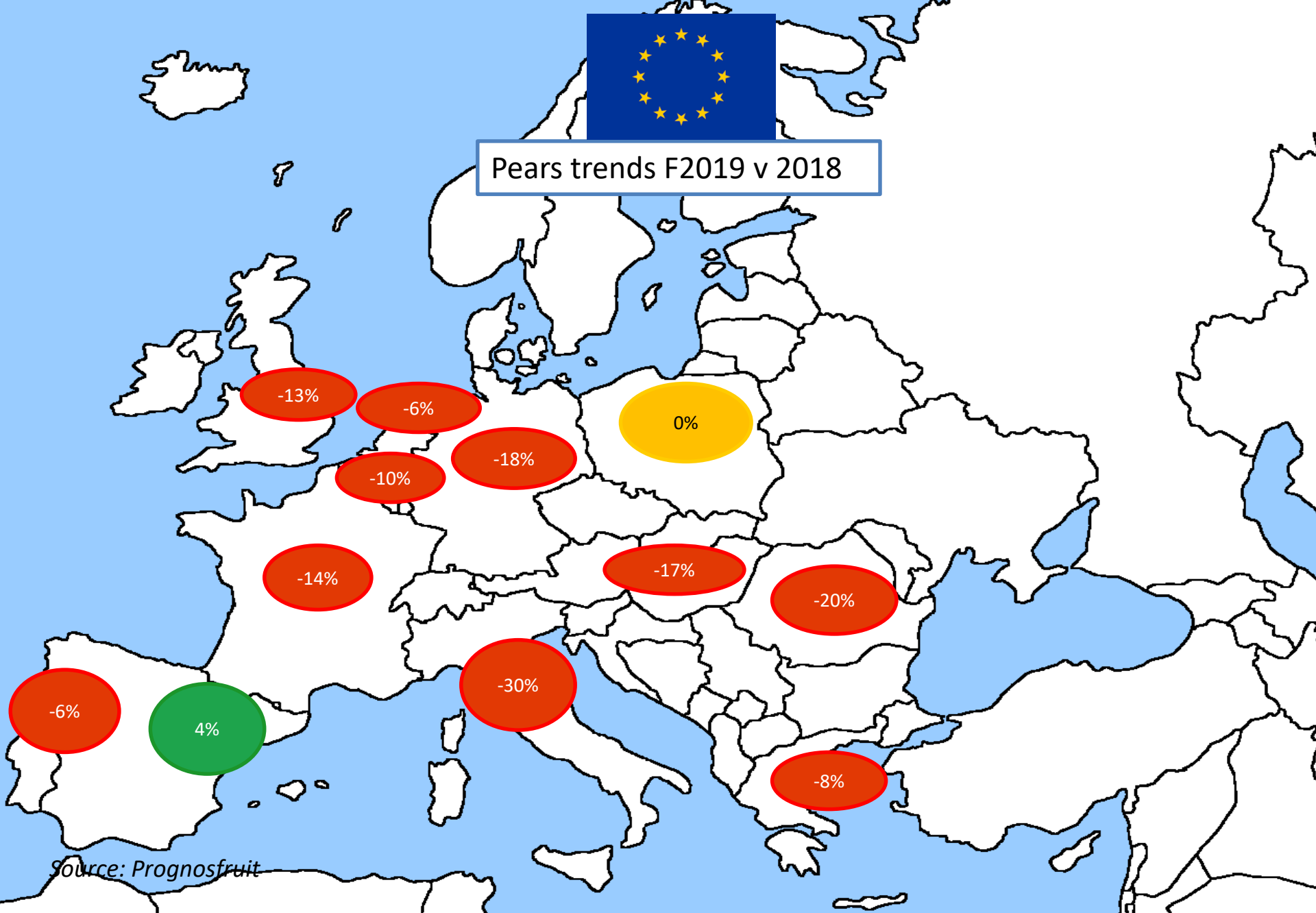
	Diff. F2019- 2018, in T	Diff. F2019- previous 9 years, in T
BE	-38	12
FR	-19	-30
IT	-219	-227
NL	-23	52
PT	-10	-10
ES	13	-62
Other	-35	7
Total	-331	-258



Source: Prognosfruit



Pears trends F2019 v 2018



Source: Prognosfruit

European pear forecast

2.047.323 T (19 Member States)

115.780 T (Remaining 5 Member States – Eurostat data) * 0,86 (% var F2019/2018) = 99,571 T

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Austria	168,66	36,12	73,24	58,18	54,13	50,70	51,11	23,45	46,11	111,34
Bulgaria	1,44	1,40	2,00	1,36	2,91	2,15	2,95	1,99	2,84	3,36
Cyprus	1,30	1,28	1,15	1,13	1,07	0,76	0,68	0,59	0,60	0,55
Finland	0,00	0,00	0,00	0,00	0,00	0,00	0,20	0,11	0,18	0,23
Luxembourg	0,26	0,26	0,24	0,16	0,23	0,28	0,46	0,54	0,22	0,30

EU – 28: 2.146.894 T
+ Switzerland: 23.284 T

GRAND TOTAL: 2.170.178 T

Source: Prognosfruit/Eurostat

4. NH Pear forecast 2019: quantitative approach by variety

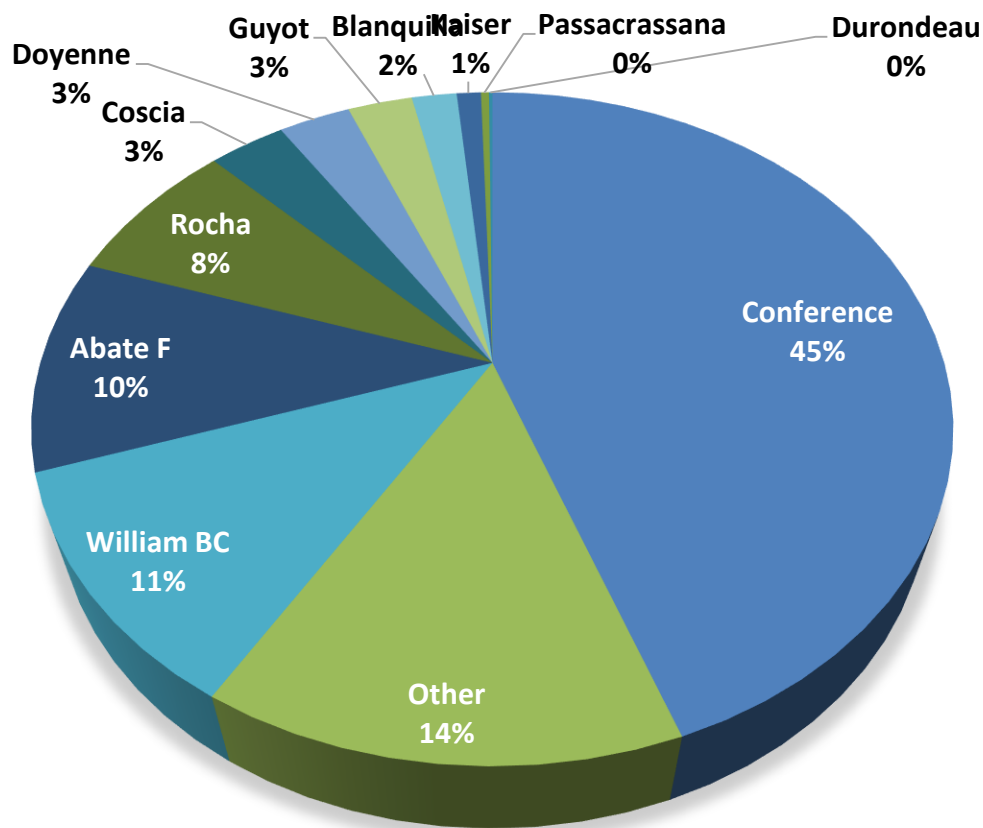


EU pear forecast

											<i>x 1000 tons</i>	
Variety	2010	2011	2012	2013	2014	2015	2016	2017	2018	F2019	(1)	(2)
Abate F 4	224	404	256	304	358	333	296	328	318	211	-34	-33
Blanquilla	81	78	59	54	49	44	40	43	40	39	-1	-4
Conference 1	832	928	693	894	952	967	908	871	988	910	-8	-1
Coscia-Ercollini	98	80	77	80	66	79	67	79	70	66	-5	-8
Doyenne du Comice	97	107	58	83	94	87	82	59	82	62	-24	-16
Durondeau	6	7	5	6	6	5	3	2	4	3	-24	-13
Guyot	92	96	70	80	67	74	59	65	58	56	-4	-9
Kaiser	42	60	39	54	33	45	38	43	45	21	-53	-50
Passacrassana	15	17	17	14	11	12	11	9	10	7	-24	-26
Rocha 5	171	209	115	162	203	134	113	186	162	152	-6	-1
William BC 3	286	332	252	283	278	283	261	263	272	230	-15	-13
Other 2	331	333	246	315	308	330	292	287	329	290	-12	-4
Total:	2,276	2,652	1,888	2,327	2,425	2,394	2,171	2,237	2,378	2,047	-14	-9

Source: Prognosfruit

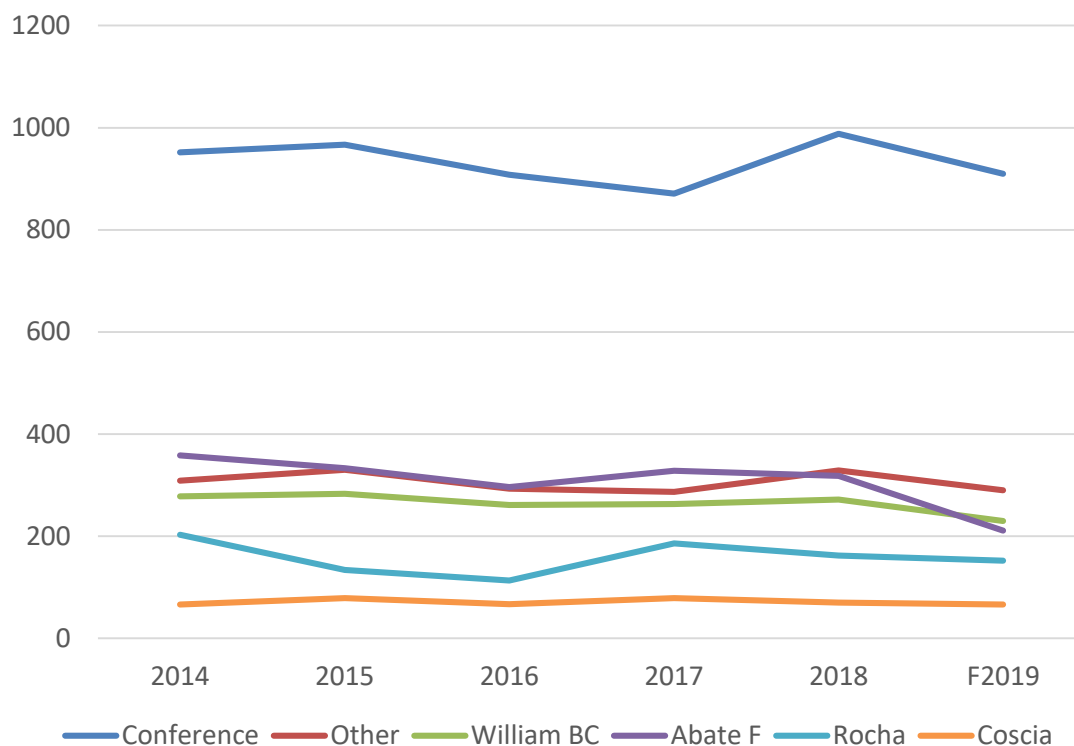
EU pear forecast



Source: Prognosfruit

EU pear forecast

Varietal change



Decline in all varieties!

Source: Prognosfruit

	2018	F2019
Conference	988	910
Other	329	290
William BC	272	230
Abate F	318	211
Rocha	162	152
Coscia	70	66
Doyenne	82	62
Guyot	58	56
Blanquilla	40	39
Kaiser	45	21
Passacrassana	10	7
Durondeau	4	3

EU pear forecast



Abate
-107.000T



Conference
-78.000 T



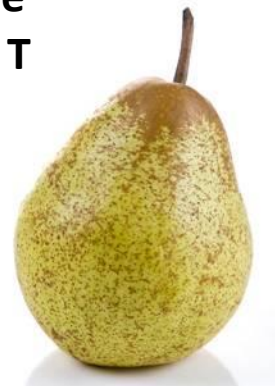
Doyenne
-20.000 T



Williams
-42.000 T



Guyot
-2.000 T



Rocha
-10.000 T

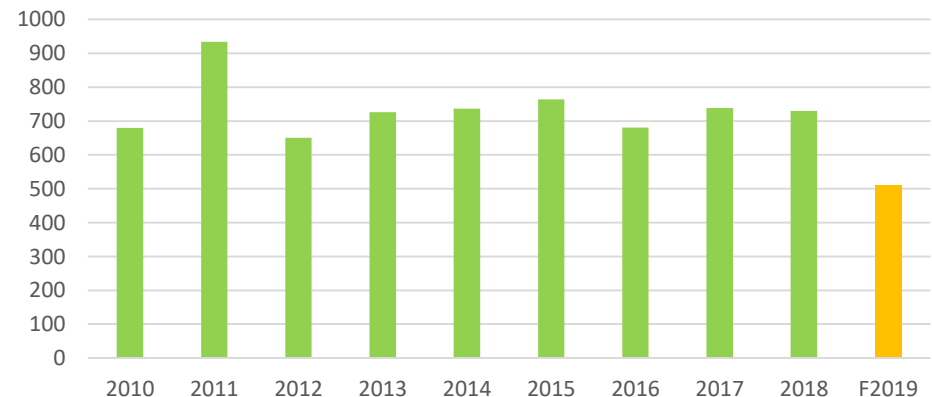
Source: Prognosfruit

5. NH Pear forecast 2019: qualitative approach



Italy

- Crop: 511.213 T (25% processing, 5-6% organic)
- Surface: Overall in decline. Abate a bit slower than other varieties. William, Santa Marie & Max Red Bartlett stable
- Temperature: Mild March, cold April & May, favourable warm weather afterwards
- Frost: No damage
- Heat: High temperatures, but nothing out of the ordinary
- Hail: Occasional hail storms, but many surfaces are protected with hail nets
- Precipitation: No rain until end April, no floods
- Sizing: Conditions for good developments are present
- Timing: Similar to average



Source: Prognosfruit

Spain & Portugal

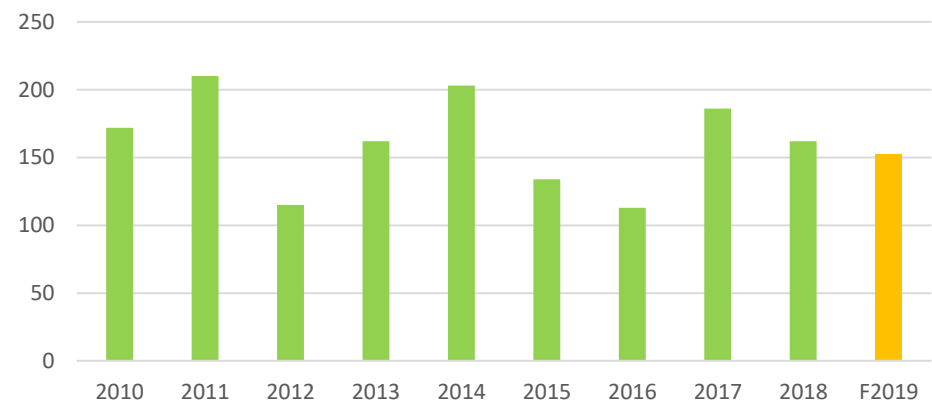
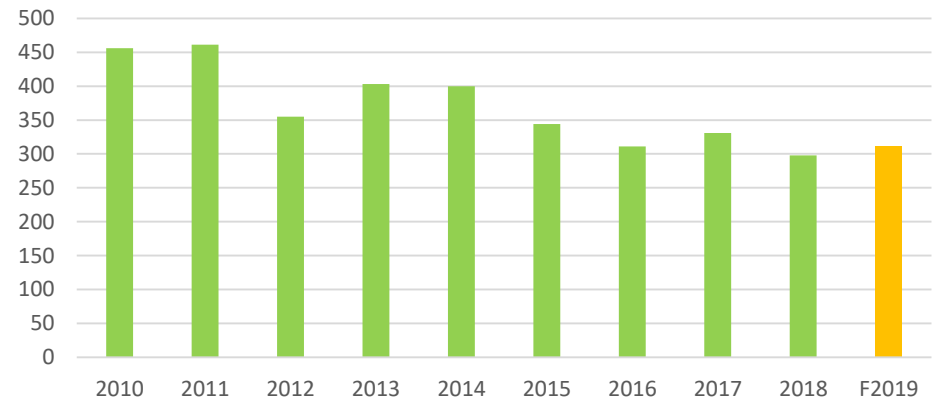
SPAIN

- Crop: 542.369 T
- Frost: A lot of damage in Calatayud
- Quality: Excellent in Murcia due to good pollination

PORTUGAL

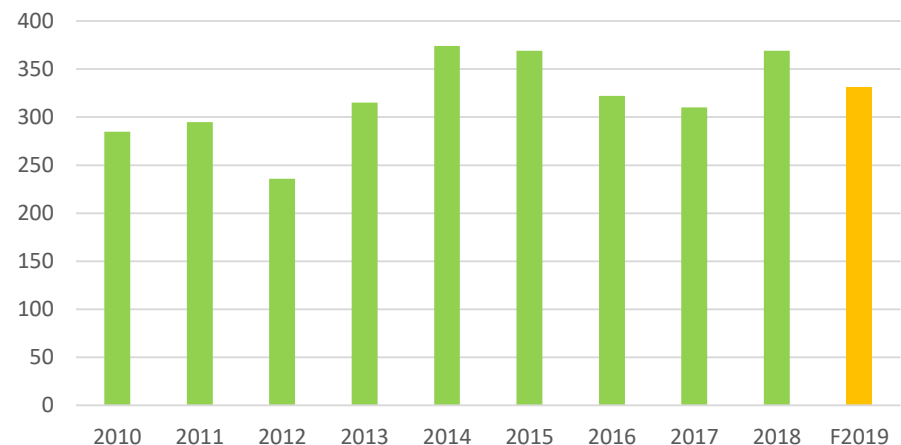
- Crop: 152.200 T (5% processing)
- Temperature: very hot during the day, too cold during the night. June coldest month of last 22 years
- Precipitation: 98% of surface in state of drought
- Timing: 15-20 days earlier than normal

Source: Prognosfruit



Belgium

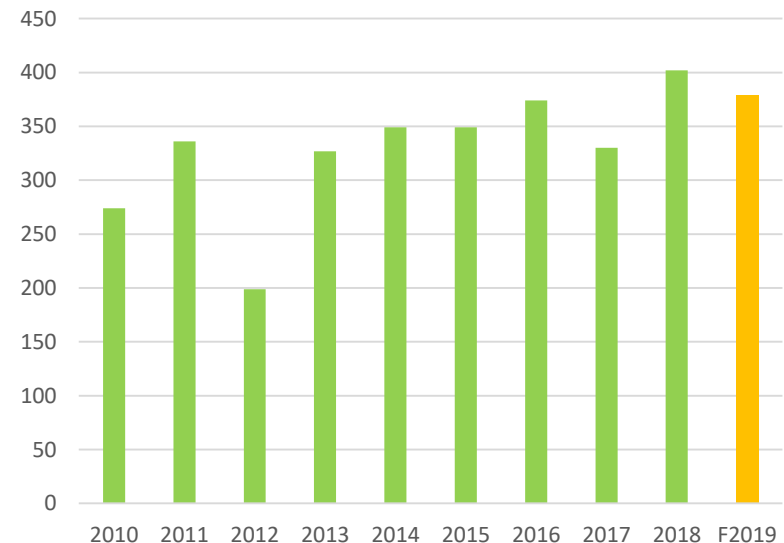
- Crop: 330.894 T (4% processing, 2% organic)
- Surface: Increase from 10.141 to 10.354 Ha
- Temperature: Mild winter, cold May, warm and sunny June
- Frost: Regional. Russeting on Conference
- Heat: Heat wave in June
- Hail: More than in 2018, but regional differences
- Precipitation: Total amount average, but overall dry. Some excess beginning of June, but local
- Sizing: Comparable to 2018 for Conference
- Timing: +/- 7 days later compared to 2018,
+/- 7 days earlier than average
- Fruit setting & physiological drop: normal



Source: Prognosfruit

The Netherlands

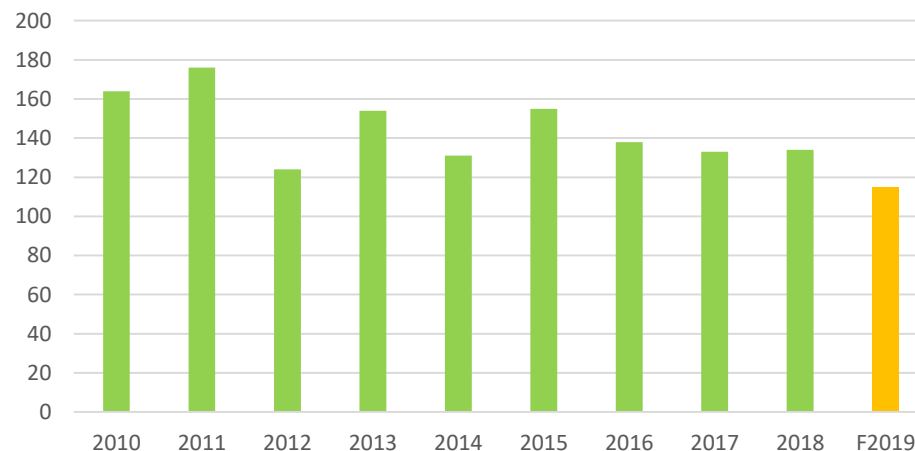
- Crop: 379.00 T (5% processing, 4% organic)
- Surface: 1% increase in 2019. Increase in centre, decrease in South West. Growth in Clubs Migo and Xenia
- Temperature: Normal in Spring
- Frost: Damage in South West
- Heat: Heat wave in week 30 (22-28 July). Heat record
- Hail: More than normal
- Precipitation: No problems with drought as of yet
- Sizing: Good size
- Colouring: Authentic Conference colour expected
- Timing: Last week August, similar to 2018
- Fruit setting & physiological drop: normal



Source: Prognosfruit

France

- Crop: 115.000 T (16% processing, 6% organic)
- Surface: 1% increase in 2019
- Frost: Some frost in the North and Alpes during flowering
- Hail: Little
- Precipitation: Very dry summer up until now
- Sizing: Normal to big size
- Flowering: Heterogenous according to areas and varieties
- Fruit setting: Weak to abundant, depending on the region
- Physiological drop: Rather abundant



Source: Prognosfruit

Organic pears

ORGANIC	2018	F2019
Romania	1.260	850
Germany	2.250	1.850
Hungary	1.140	960
Croatia	40	75
Greece	1.800	1.650
Belgium	3.690	6.620
The Netherlands	16.080	15.160
Italy	29.200	25.550
TOTAL	55.460	52.715

Source: Prognosfruit

Pears for processing

PROCESSING	2018	F2019
Romania	3.780	3.910
Germany	13.500	11.100
Hungary	7.600	6.400
Croatia	400	750
Greece	3.000	4.400
Belgium	14.760	13.240
The Netherlands	12.060	18.950
Italy	182.500	127.750
TOTAL	237.600	186.500

Source: Prognosfruit

6. Beyond the EU



NH: Switzerland

Switzerland

x 1000 tons

Variety	2010	2011	2012	2013	2014	2015	2016	2017	2018	F2019	(1)	(2)
Conference	3	5	4	4	5	4	4	3	5	4	-12	9
Kaiser	5	8	6	6	8	7	5	2	10	8	-15	42
William BC	5	6	4	6	6	6	4	3	5	5	-9	11
Other	5	7	6	6	7	6	9	3	6	6	0	-1
Total	18	26	20	22	26	23	23	12	26	23	-10	16
Switzerland												

Source: Prognosfruit

NH: USA

USA

x 1000 tons

<i>Variety</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>2018</i>	<i>F2019</i>	<i>(1)</i>	<i>(2)</i>
Anjou	202	228	205	232	224	194	166	169	187	177	-6	1
Bartletts / William B	361	371	356	363	336	347	333	303	294	284	-4	-8
Bos c	61	82	65	75	62	70	70	53	70	52	-25	-18
Doyenne du Comice	6	6	5	6	5	4	6	3	4	4	-2	-9
Red Anjou	19	19	20	22	22	19	20	20	19	20	9	5
Seckel	2	2	1	1	1	1	1	1	1	1	1	-1
Other Reds	0	1	1	7	8	10	9	8	8	9	2	1
Other Varieties	9	12	13	6	5	3	4	3	4	3	-30	-24
Total USA:	660	720	666	711	663	648	608	561	587	550	-6	-6

Source: Prognosfruit

Southern Hemisphere

Pears

x 1000 tons

Country	2010	2011	2012	2013	2014	2015	2016	2017	2018	F2019	(1)	(2)
Argentina	576	731	743	801	702	782	815	578	579	600	4	-9
Australia	107	130	124	129	107	104	100	102	105	98	-7	-4
Chile	170	194	189	200	170	188	177	149	185	193	4	13
New Zealand	11	11	9	12	10	12	12	11	14	13	-2	9
South Africa	356	360	361	379	399	415	432	436	423	423	0	-2
Total	1.220	1.427	1.426	1.521	1.388	1.500	1.535	1.276	1.305	1.327	2	-3

(1) Percentage difference between F2019 and 2018

(2) Percentage difference between F2019 and the average of 2016 - 2017 - 2018

Source: WAPA

7. Closing remarks



Closing remarks

- 2nd lowest crop of the decade
- Decrease in all major pear producing countries except for Spain
- Decrease due to
 - Local meteorological events (hail, frost, heat & drought, rainfall, etc.) with different impact among the regions
 - Decrease in surface
- More market analysis by Helwig Schwartau

Thank you for your attention

www.wapa-association.org

www.prognosfruit.eu

