

Pear Market Outlook season 2019/20

PROGNOSFRUIT CONGRESS 2019
HELWIG SCHWARTAU, AMI

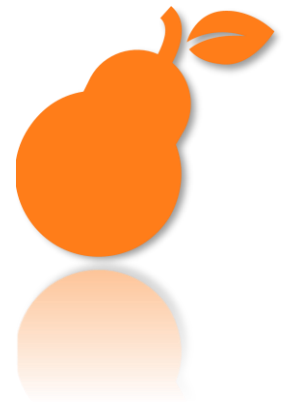


natürlich informiert.

Smaller crops in all countries



- Baseline in autumn
 - Short supply in August, no EU stocks, overseas almost finished
 - Current price for summer pears is higher than usually
- Conference
 - Traders and producers in Benelux are very relaxed
 - Do we need Russia?
 - In which markets could Conference profit from smaller Abate Fetel harvest?
- Abate Fetel
 - Start with clearly higher price? Dangerous to overwind prices?
 - Losing market share in Germany in the long run?
- Overseas, EU imports could increase

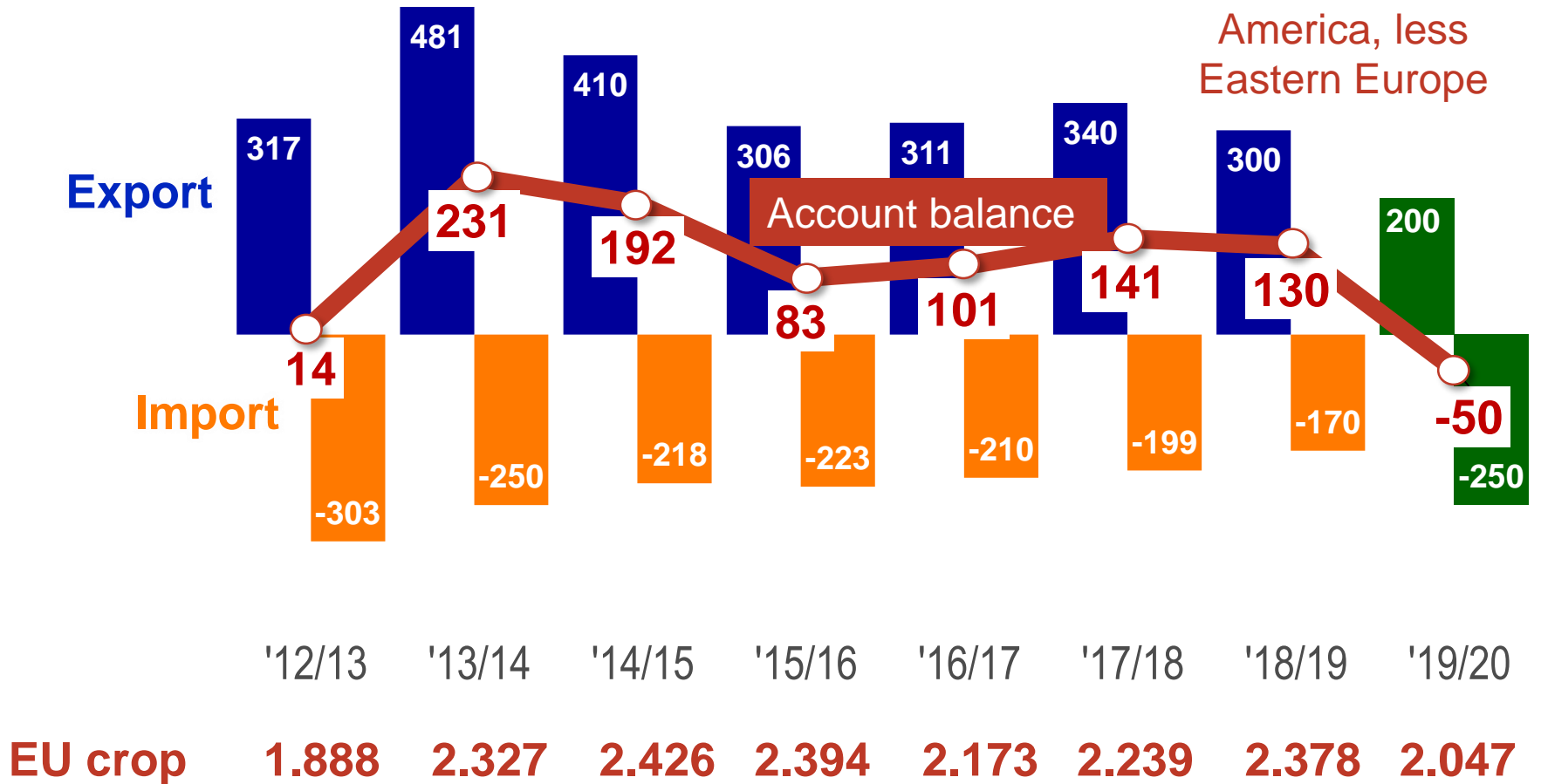


First time of negative account balance?



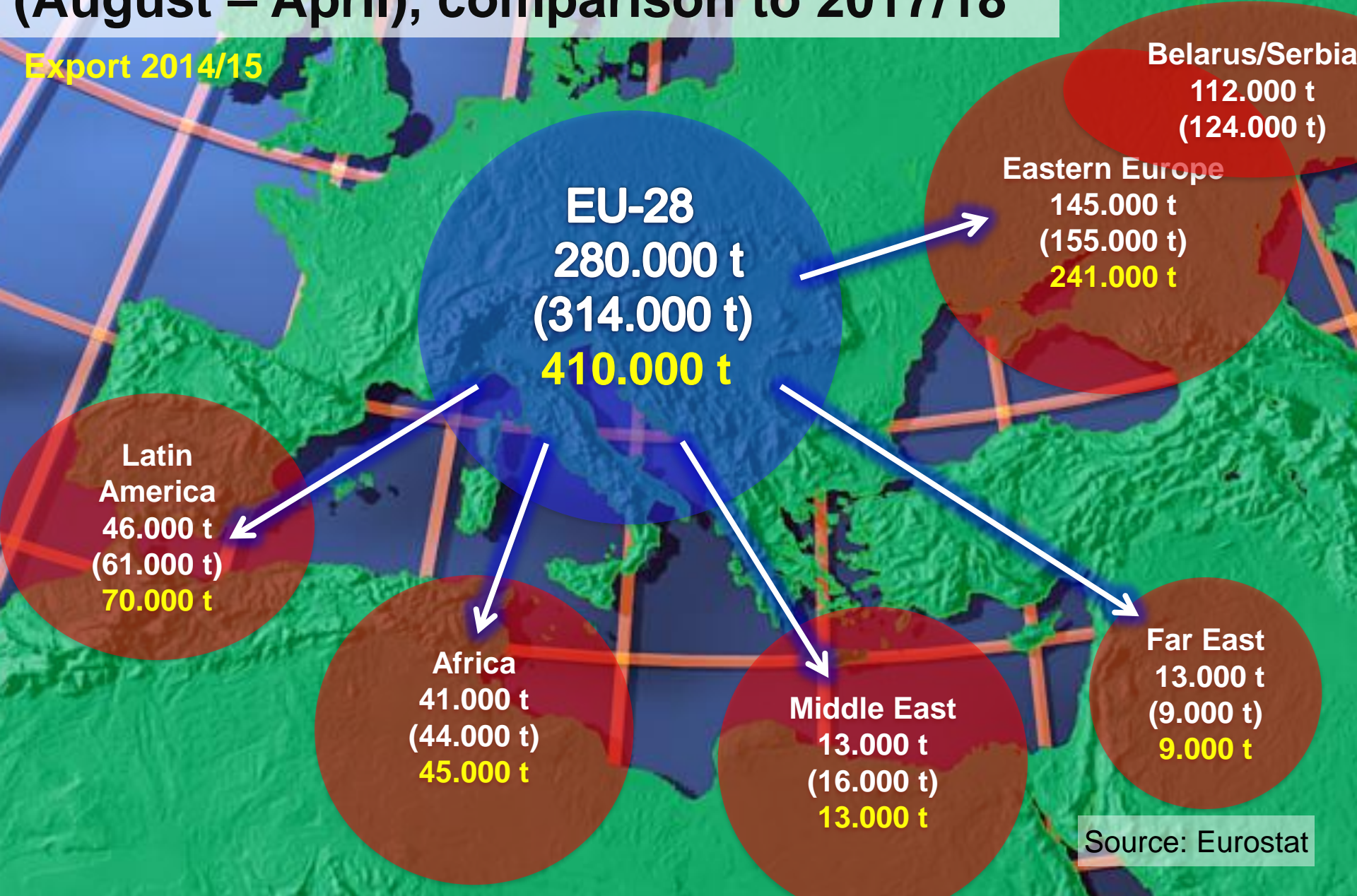
Current account balance for EU pears (August to July in 1.000 tons)

Stable exports to Asia and South America, less Eastern Europe



EU 28 - Pear exports in 2018/19 (August – April), comparison to 2017/18

Export 2014/15



Source: Eurostat

New pear markets, who could supply?

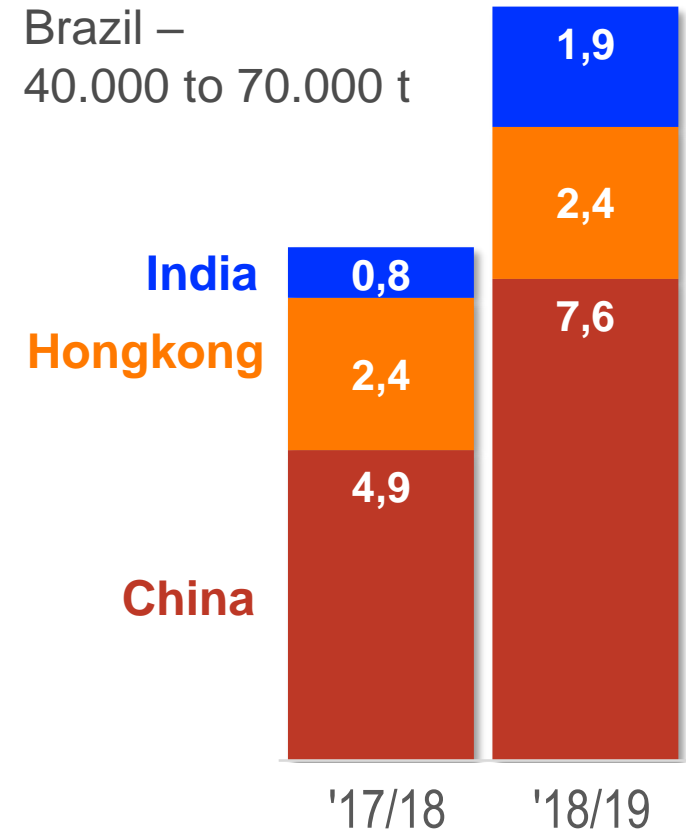


| | FRA | IT | BEL | NL | SP |
|-----------|------------------------|-------------|------------------------|------------------------|------------------------|
| Brazil | Export possible | | Opened since Aug. 2018 | Opened since Aug. 2018 | Export possible |
| Mexico | Negotiation | | Opened since Aug. 2018 | Opened since Aug. 2018 | Negotiation |
| Colombia | Export possible | | Negotiation | Opened since Aug. 2018 | Export possible |
| Canada | | | Export possible | Export possible | Export possible |
| USA | Export possible | | | Negotiation | Opened since Aug. 2018 |
| Vietnam | | | Export possible | Export possible | |
| China | | Negotiation | Export possible | Export possible | |
| India | | | Export possible | Export possible | Export possible |
| Thailand | | | | Negotiation | Negotiation |
| Indonesia | Opened since Aug. 2018 | | Opened since Aug. 2018 | | |

EU exports Aug. to April, 1,000 t

Brazil –

40.000 to 70.000 t

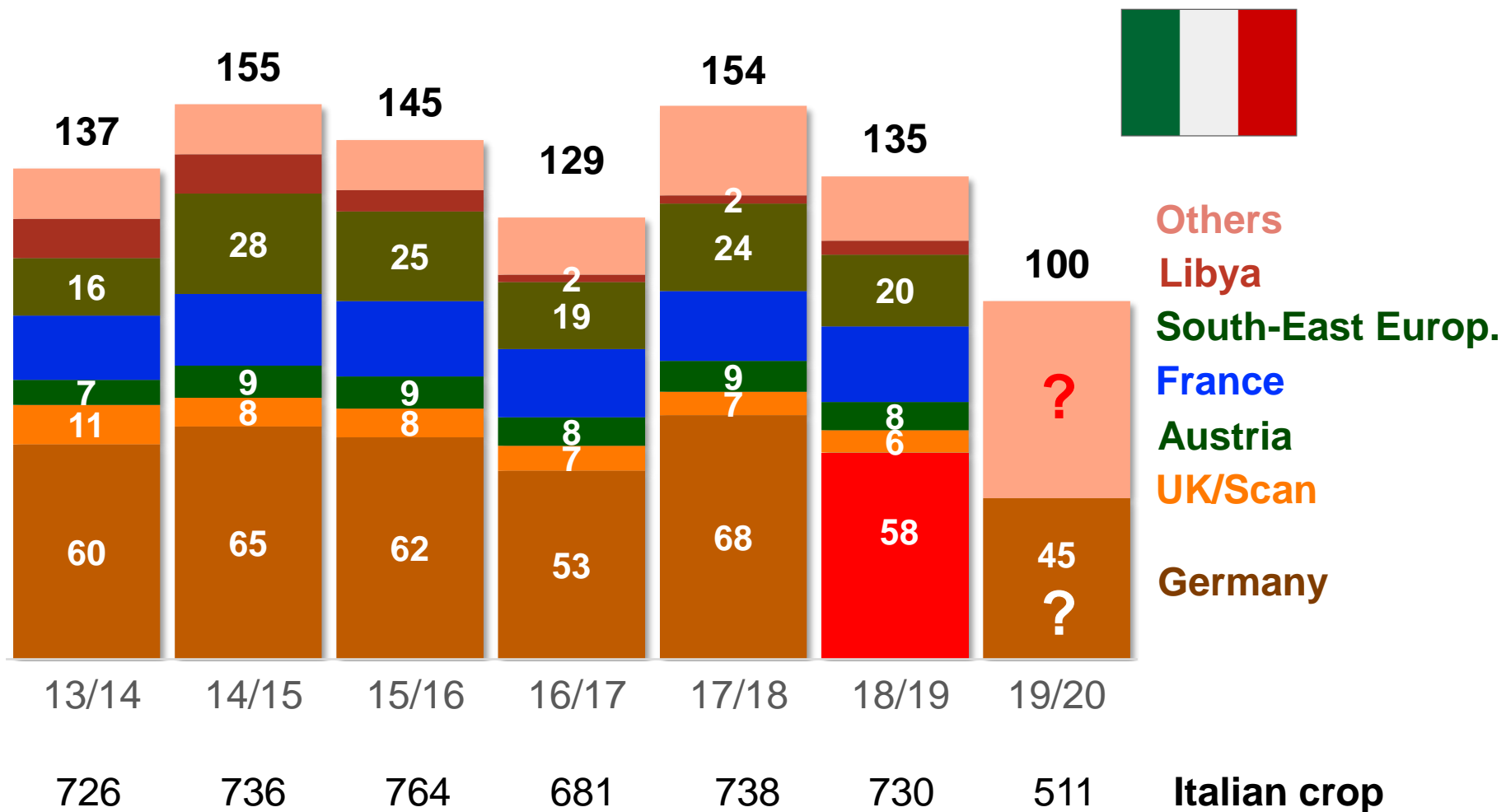


■ Negotiation
 ■ Export possible
 ■ Opened since Aug. 2018

Less Abate Fetel, Chance for Conference



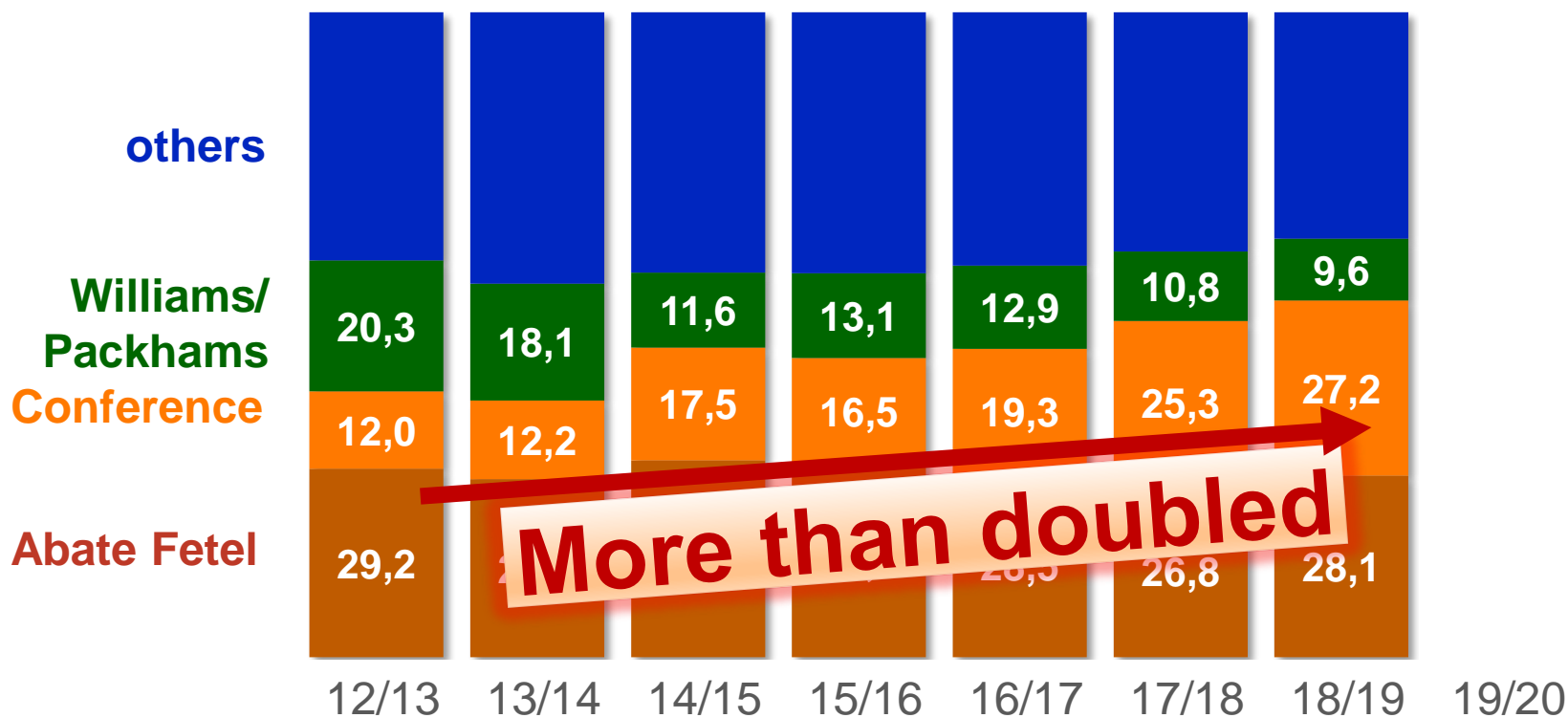
Italian pear exports, July to April, in 1.000 t



Conference – in the future No.1?



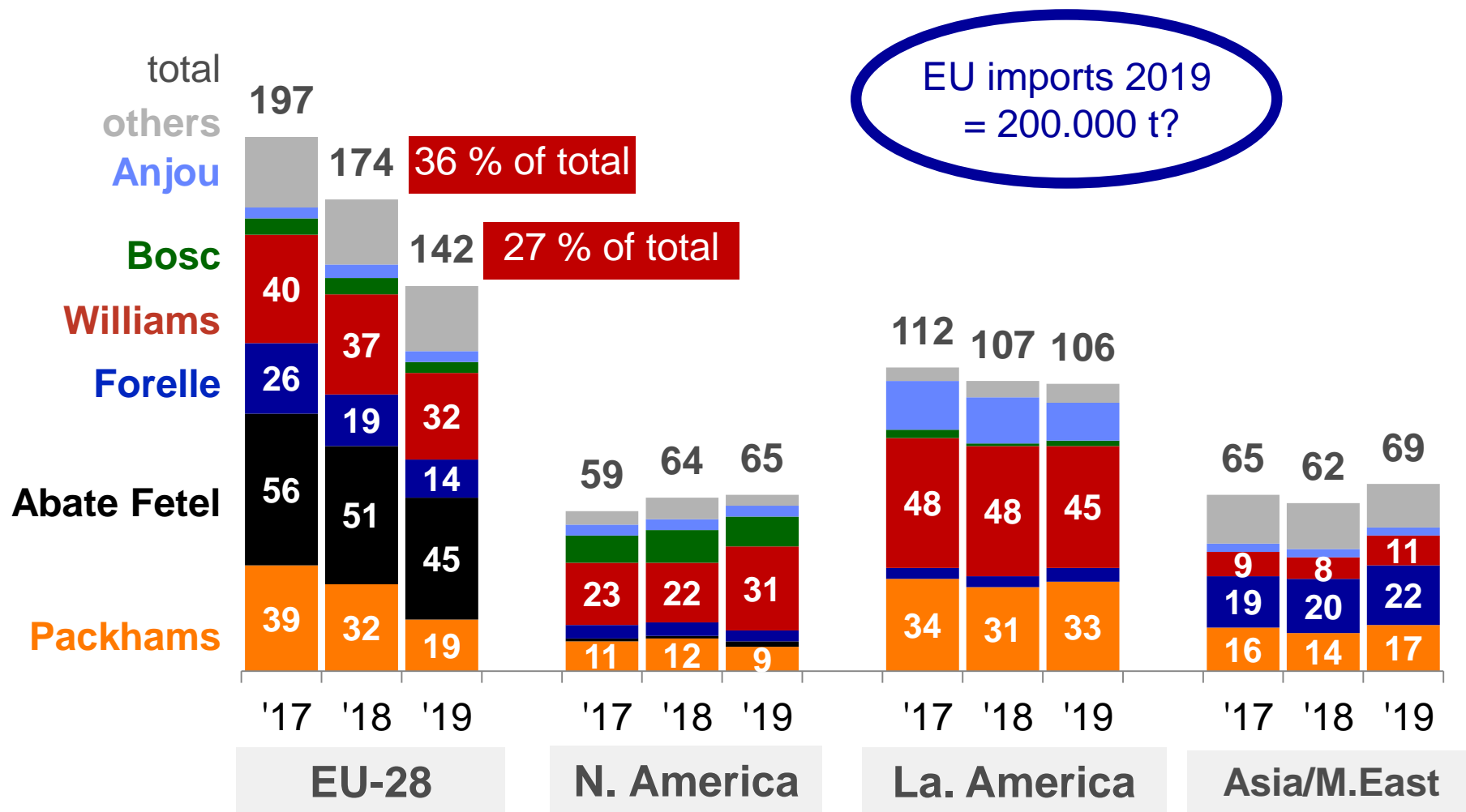
Pear consumption in Germany – market share August to June, in %



Europe still in focus, but decreasing



Overseas pears – Global exports until the end of July, in 1.000 t



Successful start



Spanish pear production:

2019 = 311.000 t

2018 = 298.000 t

2017 = 331.000 t

2016 = 311.000 t



French pear production:

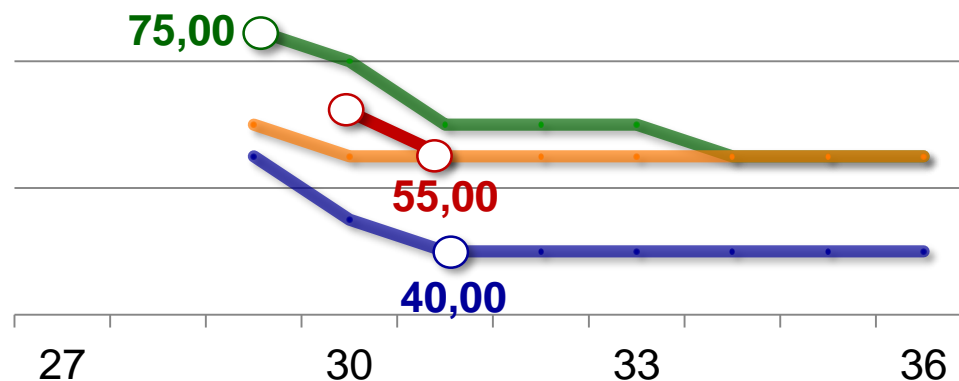
2019 = 115.000 t

2018 = 134.000 t

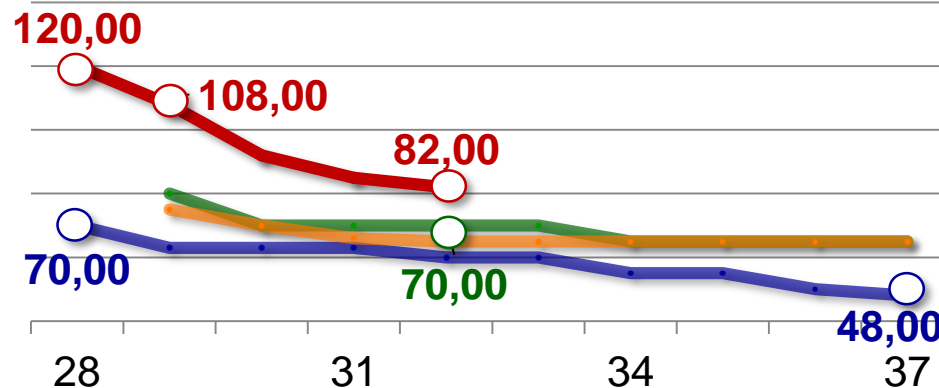
2017 = 133.000 t

2016 = 138.000 t

Price for Limonera, 60 mm+, ex region, in EUR/100kg



Price for Guyot, 60-70 mm, ex region, in EUR/100kg

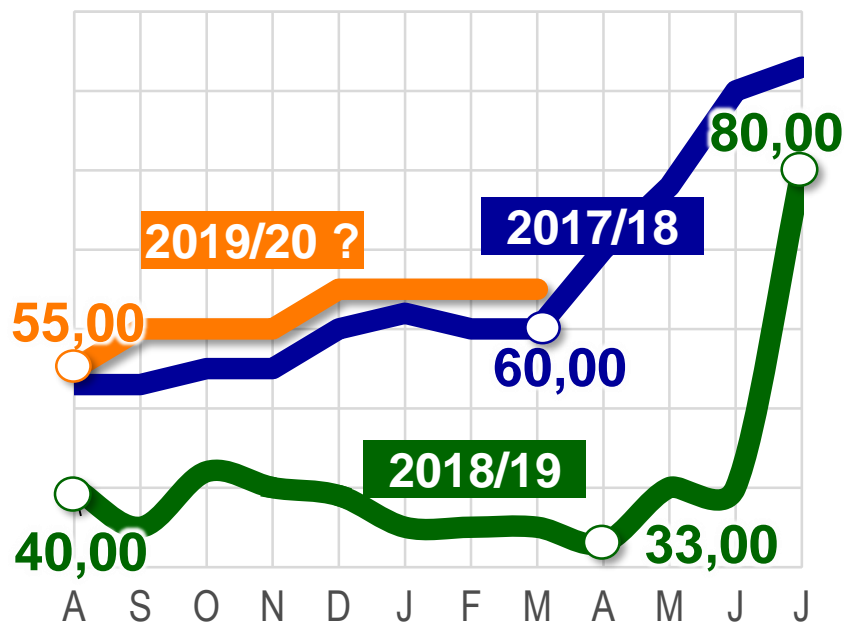


Italy affected the price level

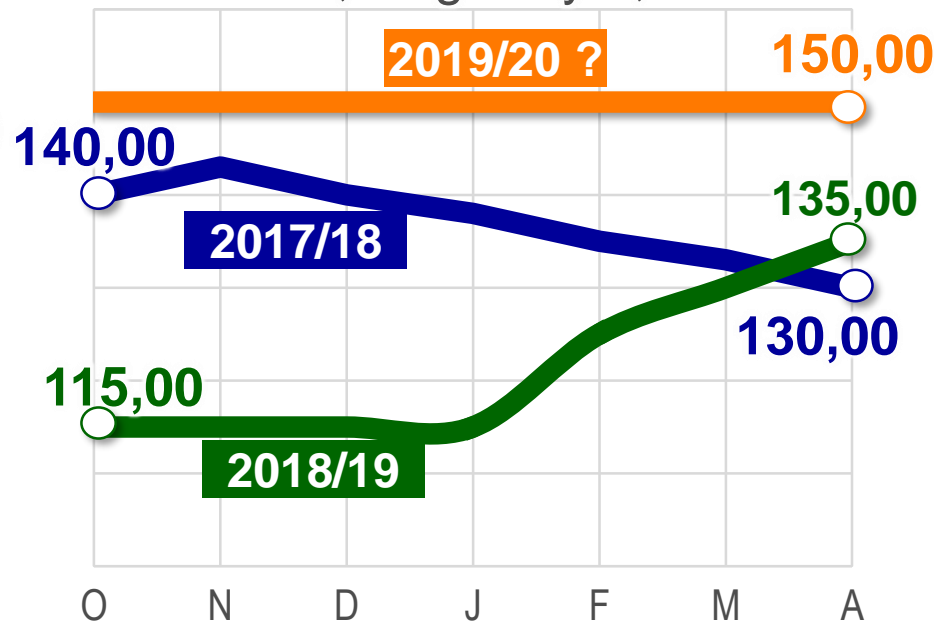


Price for pears, EUR/100 kg net

NL – Veiling price Conference, class 1, 55-65mm



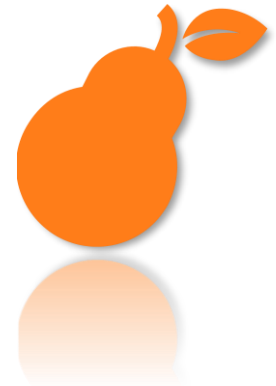
Italy – Export price Abate Fetel, single layer, 70-75mm



Conclusion



- Autumn with short oversea volume, no EU stocks (crop 2018), good start for summer pears.
- Conference with bigger size than 2018, better shelf life
- Less Abate Fetel – benefit Conference
- Russian market less important than last year, Putin extended Russian ban to the end of 2020
- Basis for a successful season is available, but



**Don't overwind the price in autumn
and don't forget to sell**

Thanks a lot for your attention.

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