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## Greece

## Fresh Deciduous Fruit

## Annual

## 2008

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**Report Highlights:**

Following poor weather conditions during harvest, Greek production of apples, pears and table grapes are all down. Likewise, exports have reduced and imports have increased. As expected, prices have increased with supply limitations.

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Includes PSD Changes: Yes  
Includes Trade Matrix: Yes  
Annual Report  
Rome [IT1]  
[GR]

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## Executive Summary

Following three major heat waves, storms and hail during late summer of 2007, Greek production of fresh deciduous fruit declined for most products. Initial production estimates made in the spring of 2007 talked of fresh fruit output similar to levels in 2006. However, after the adverse weather experienced through summer and early fall, final harvest numbers are now significantly reduced. Farming organizations report that both quantity and quality have been affected in most areas. Some pockets were not as severely affected, but generally, the 2007 crop year was a bad year for Greece's fresh deciduous fruit production. In many locations, poor quality, nonmarketable fruit was left to waste in the fields.

Reportedly, for MY 2007/2008, Greece has started importing large amounts of fruit to satisfy demand. Exports, on the other hand, have slowed to limited quantities. Moreover, prices in the fresh markets have increased significantly over the prices in MY 2006/2007.

## Fresh Apples

### Production

Greek output of apples in 2006 finally reached the satisfactory level of 267,000 MT. However, this is still quite a bit below what Greece would consider a good output, which, with favorable weather conditions, can easily reach 300-320,000 MT. The 2007 apple production in Greece is estimated at about 225,000 MT, roughly a 16 percent decrease from 2006. Only marketable amounts (domestically or abroad) of relatively acceptable quality apples are being harvested. PROGNOSEFRUIT 2007 has estimated that total EU-27 apple production in 2007 will be approximately 13% lower than production in 2006.

Greek apple production has been declining since 2000. While most of this decline can be attributed to adverse weather conditions, other factors contributing to the decline include gradual crop restructuring to replace older varieties, and crop abandonment by aged farmers. Weather conditions, which have prevailed in Central Greece, the primary apple production region, have included hail, spring frosts, and extremely high temperatures before and during harvest. On several occasions harvest has been followed by heavy storms and hail, particularly in Thessaly, Central Macedonia and the West coast prefectures.

The Greek apple varieties that are promoted for both domestic use and exports include:

The late Fuji Kiku – 8

Fuji Zhen Aztec C.O.V.

Jeromine C.O.V.

Super Chief (Spur Red Delicious)

Annaglo C.O.V. (Red GALA)

Granny Smith

Golden Smoothee 2832 T

Approximately seventy percent of cultivated Greek apple orchards are planted with the red varieties, predominately Starking of the red Delicious group. Yellow varieties, particularly Golden Delicious, follow with 13 percent and green varieties, Granny Smith, with 10 percent. The remaining 7 percent of cultivated orchards are planted with a variety of types of apples. Geographically, 47 percent of apples are produced in Macedonia (Kastoria, Pella and Imathia

prefectures), 24 percent in Thessaly (Larissa and Volos prefectures), 11 percent in Peloponnese (Arcadia prefecture) and 18 percent elsewhere in scattered pockets. By the end of 2007, certified organic apple production in Greece reached 200 hectares, approximately a 20-25 percent increase over the previous year. Restructuring of the Greek apple varietal composition, which was initiated almost ten years ago, is taking place at a much slower pace than in France and Italy. However under the new CAP, Greek farmers are showing a preference for shifting to tree crops, gradually abandoning traditionally subsidized crops.

### Prices

Farm prices in 2007, for Red Delicious and Granny Smith apples, fluctuated between 0.45-0.70 Euros/kg, based on quality and quantity. Wholesale centers and open markets in the country have reported prices for red varieties between 0.60-0.65 Euro/Kg for lower quality, between 0.80-0.90 Euro/Kg for average quality and between 0.90 -1.20 Euro/Kg for better qualities. Trade sources believe that price levels for the highest demanded varieties and qualities will experience an upward trend in late January and February, 2008. Presently, domestic consumption has favored lower priced domestic apples and imports from Eastern Europe.

The “Zagorin,” a popular, local red delicious variety produced in Thessaly, has experienced fluctuations in farm prices between 1.00 -1.15 Euro/kg, depending on quality. As cited in GR3019, the EU provides protection for Zagora apples produced under the name “Zagorin” and from the Zagora region, under the EU Denomination of Origin Regulation 1107/96. In a good year, the Zagora region produces about 15,000 MT of apples. In 2007, the Zagorin apple production remained below 10,000 MT due to the unfavorable weather conditions described previously. However, quality standards of color, size and flesh hardness have remained satisfactory. (Additional information pertaining to the Zagorin apple variety and marketing are reported in GR6012.)

### Trade

In CY 2006, Greece exported 38,000 MT of apples, valued at \$16.4 million, compared to 47,000 MT exported the previous year. A further decrease in exports is expected for MY 2007/2008, due primarily to decreased output in 2007. The bulk of exports are destined to Albania, Russia, FYROM, Romania and Bulgaria. Only a few tons, approximately 250-300 MT/annum, are sold to EU-25. Greek apple imports are dominated by Italian apples, which account for almost 50 percent of total Greek annual imports, followed by imports from Chile, with 12 percent. No imports of U.S. apples are reported for the past few years. In CY 2006, Greece purchased 22,413 MT of apples, of which almost 11,000 MT were of Italian origin, high-quality apples. The value of total imports in CY 2006 is reported at \$24.5 million. A substantial increase in imports is expected in MY 2007/2008, due to a EU-wide shortage in production. This increase in imports is likely to originate from both old and new origin varieties.

### Fresh Pears

#### Production

According to farmer sources, domestic pear production is still limited due to a variety of reasons including adverse weather in 2007 and disease. In 2007, pear output is expected to be in the neighborhood of 35,000 MT for the same reasons cited in the Apple section, above. Output in 2006 was 43,000 MT. As cited in the 2003 and 2004 annual reports, pear cultivation has suffered because of a number of diseases, such as *Erwinia amylo-vora*,

forcing farmers to uproot trees. This has consequently contributed to a reduction of fresh pear output. A long discussion on the varietal structure, pear crop restructuring attempts, and planting policies was provided in the 2006 annual report, GR6012.

### Prices

Farmer prices in 2007/2008 are expected to fluctuate between 0.60 – 0.90 Euro/kg according to variety and quality, a little higher from prices paid a year earlier. Consumer prices for imported varieties such as Passacrassana, Abate F., Blanquilla etc, will also increase significantly due to lower outputs reported in Italy and Spain. This EU-side decrease in production is likely to contribute to a shortage of pears later in the season.

### Trade

Greece exported over 3,000 MT in CY 2006, valued at \$1.98 million. This compares to barely over 1,000 MT in CY 2005. Limited exports are also likely in MY 2007/2008. Imports during this same period were 15,500 MT, with over 50% originating in Spain, and 8% from Italy. Total Greek imports for CY 2006 were valued at \$14.5 million, compared to just over 16,000 MT in CY 2005. Because of domestic production declines, Greek pear imports in CY 2007/2008 are expected to approach 20,000 MT.

### Table Grapes

#### Production

According to the Ministry of Agriculture and farmer organizations, the 2007/2008 table grape production is roughly estimated at 238,000 MT, compared to 300,000 MT in 2006/2007. The decline in production is primarily attributable to the heat wave which prevailed in August and hit the vineyards on the islands of Crete and Peloponnese. The fresh sultana output, grown on the island of Crete, was reduced by 20 percent. Table varieties grown in the east and central Macedonia were not as affected, allowing some trade to continue. On the contrary, grapes from the south, Peloponnese and Crete, were reduced by almost 30 percent from the previous year. Trade sources report that the significant drop of Greek grape exports observed in the beginning of MY 2007/2008, were a result of mistakes and unjustifiable panic among Greek exporters. As a result of these mistakes and panic, clients lost interest in sourcing table grapes from Greece, believing that the Greek output was too small and of bad quality. Some sources believe that this was done intentionally to drive up prices, particularly for the Greek fresh sultana. However, as a result of these market forces, large quantities of Greek table grapes remained unpurchased and buyers preferred to supplement with the cheaper Crimson variety.

#### Prices

Farmer prices for fresh grapes fluctuated in MY 2007/2008 between 0.55 – 1.35 Euros/kg, depending on variety and quality. Sultanas garnered the highest price, followed by the Rozaki variety, grown mostly in Northern Greece in the prefecture of Kavala, which is also exportable.

## Trade

In CY 2006 total exports reached almost 89,000 MT, down slightly from exports in CY 2005, valued at \$138 million. Ninety-five percent of these exports were destined to the EU-25, with Germany leading with over 30,000 MT, followed by the UK. In the current season, exports are expected to decrease significantly, reduced to less than 70,000 MT. Grape imports are much less significant, rarely exceeding 2,500 MT/annum. In CY 2006, imports dropped to only 1,600 MT, mostly from Italy.

More analysis on the varietal structure and restructuring plans of the Greek table grape industry was provided in GR6012.

## Policy

Under the new CAP reform, the Government of Greece has already announced policies concerning its Horticultural Sector. AgAthens prepared a special report in November 2007, on these developments. (See GR7018.) Details on coupling and decoupling measures in the fruit sector are cited in the report, with analyses and comments on future probable developments concerning agricultural land use changes and restructuring.

Other policy measures are under way and have also been discussed in previous reports. These include tree variety and crop restructuring efforts, implementation of fruit packaging improvement programs and technical supports to young farmers, related to integrated crop management and pest management practices, reduction of chemical residue levels and promotion of organic cultivations.

## PS&amp;D Table, Fresh Apples

## PSD Table

| Country                | Greece        |          |          |          |          |          |                      |          |          | L    |
|------------------------|---------------|----------|----------|----------|----------|----------|----------------------|----------|----------|------|
|                        | Apples, Fresh |          |          |          |          |          |                      |          |          |      |
| Commodity              | 2005          |          |          | 2006     |          |          | (HA)(1000 TREES)(MT) |          |          |      |
|                        | 2005          | Revised  | Post     | 2006     | Estimate | Post     | 2007                 | Forecast | Post     |      |
|                        | USDA          | Post     | Post     | USDA     | Post     | Post     | USDA                 | Post     | Post     |      |
|                        | Official      | Estimate | Estimate | Official | Estimate | Estimate | Official             | Estimate | Estimate |      |
| Market Year Begin      |               | 07/2005  | 07/2005  |          | 07/2006  | 07/2006  |                      | 07/2007  | 07/2007  | MM   |
| Area Planted           | 16235         | 16235    | 16235    | 16236    | 16236    | 16236    | 0                    | 0        | 16500    | (HA  |
| Area Harvested         | 15937         | 15937    | 15937    | 16000    | 16000    | 16000    | 0                    | 0        | 16100    | (HA  |
| Bearing Trees          | 6068          | 6068     | 6068     | 6100     | 6100     | 6100     | 0                    | 0        | 6200     | (100 |
| Non-Bearing Trees      | 48            | 48       | 48       | 35       | 35       | 35       | 0                    | 0        | 55       | (100 |
| Total Trees            | 6116          | 6116     | 6116     | 6135     | 6135     | 6135     | 0                    | 0        | 6255     | (100 |
| Commercial Production  | 263000        | 263000   | 263000   | 267000   | 267000   | 267000   | 0                    | 0        | 225000   | (MT  |
| Non-Comm. Production   | 2000          | 2000     | 2000     | 3000     | 3000     | 3000     | 0                    | 0        | 2500     | (MT  |
| Production             | 265000        | 265000   | 265000   | 270000   | 270000   | 270000   | 0                    | 0        | 227500   | (MT  |
| Imports                | 26000         | 26000    | 26000    | 25000    | 25000    | 25000    | 0                    | 0        | 38000    | (MT  |
| Total Supply           | 291000        | 291000   | 291000   | 295000   | 295000   | 295000   | 0                    | 0        | 265500   | (MT  |
| Fresh Dom. Consumption | 245000        | 245000   | 245000   | 247000   | 247000   | 247000   | 0                    | 0        | 231500   | (MT  |
| Exports, Fresh         | 39000         | 39000    | 39000    | 37000    | 37000    | 37000    | 0                    | 0        | 27000    | (MT  |
| For Processing         | 2000          | 2000     | 2000     | 3000     | 3000     | 3000     | 0                    | 0        | 1000     | (MT  |
| Withdrawal From Market | 5000          | 5000     | 5000     | 8000     | 8000     | 8000     | 0                    | 0        | 6000     | (MT  |
| Total Distribution     | 291000        | 291000   | 291000   | 295000   | 295000   | 295000   | 0                    | 0        | 265500   | (MT  |

Export Trade Matrix, Fresh Apples

# Export Trade Matrix

Country Greece

Commodity Apples, Fresh

Time Period  Units:

Exports for:

U.S.  U.S.

Others Others

|                   |       |              |       |
|-------------------|-------|--------------|-------|
| Poland            | 92    | Italy        | 165   |
| Germany           | 86    | Austria      | 112   |
| Spain             | 154   | Spain        | 7     |
| Other EU          | 178   | Other EU     | 26    |
| >EU Total         | 510   | >EU Total    | 310   |
| Albania           | 22844 | Albania      | 16353 |
| Bulgaria          | 16125 | Bulgaria     | 8389  |
| FYROM             | 1808  | Russian Fed. | 7129  |
| Russian Fed.      | 3347  | FYROM        | 1498  |
| Cyprus            | 150   | Romania      | 1096  |
| Total for Others  | 44784 |              | 34775 |
| Others not Listed | 2489  |              | 3096  |
| Grand Total       | 47273 |              | 37871 |

Import Trade Matrix, Fresh Apples

# Import Trade Matrix

Country Greece

Commodity Apples, Fresh

Time Period  Units:   
 Imports for:    
 U.S.  U.S.

| Others            |       | Others       |       |
|-------------------|-------|--------------|-------|
| Italy             | 10098 | Italy        | 10901 |
| Germany           | 2412  | Germany      | 2187  |
| Netherlands       | 1328  | Netherlands  | 576   |
| Spain             | 887   | Spain        | 1235  |
| Belgium & Lux.    | 717   | Other EU     | 750   |
| Other EU          | 332   | >EU Total    | 15649 |
| >EU Total         | 15774 | Chile        | 5219  |
| Chile             | 4192  | Argentina    | 1079  |
| Argentina         | 2409  | FYROM        | 258   |
| South Africa      | 256   | South Africa | 148   |
| Total for Others  | 22631 |              | 22353 |
| Others not Listed | 183   |              | 60    |
| Grand Total       | 22814 |              | 22413 |

## PS&amp;D Table, Fresh Pears

## PSD Table

Country

Greece

Commodity

Pears, Fresh

| Market Year Begin      | 2005     |          |          | 2006     |          |          | (HA)(1000 TREES)(MT) |          |            | L |
|------------------------|----------|----------|----------|----------|----------|----------|----------------------|----------|------------|---|
|                        | 2005     | Revised  | Post     | 2006     | Estimate | Post     | 2007                 | Forecast | Post       |   |
|                        | USDA     | Post     | Estimate | USDA     | Post     | Estimate | USDA                 | Post     | Estimate   |   |
|                        | Official | Estimate | New      | Official | Estimate | New      | Official             | Estimate | New        |   |
|                        | 07/2005  | 07/2005  |          | 07/2006  | 07/2006  |          | 07/2007              | 07/2007  | MM         |   |
| Area Planted           | 0        | 0        | 0        | 0        | 0        | 0        | 0                    | 0        | 0 (HA)     |   |
| Area Harvested         | 0        | 0        | 0        | 0        | 0        | 0        | 0                    | 0        | 0 (HA)     |   |
| Bearing Trees          | 0        | 0        | 0        | 0        | 0        | 0        | 0                    | 0        | 0 (10)     |   |
| Non-Bearing Trees      | 0        | 0        | 0        | 0        | 0        | 0        | 0                    | 0        | 0 (10)     |   |
| Total Trees            | 0        | 0        | 0        | 0        | 0        | 0        | 0                    | 0        | 0 (10)     |   |
| Commercial Production  | 52500    | 52500    | 52500    | 43000    | 43000    | 43000    | 0                    | 0        | 35000 (MT) |   |
| Non-Comm. Production   | 3500     | 3500     | 3500     | 2000     | 2000     | 2000     | 0                    | 0        | 1300 (MT)  |   |
| Production             | 56000    | 56000    | 56000    | 45000    | 45000    | 45000    | 0                    | 0        | 36300 (MT) |   |
| Imports                | 10000    | 10000    | 10000    | 15000    | 15000    | 15000    | 0                    | 0        | 19500 (MT) |   |
| Total Supply           | 66000    | 66000    | 66000    | 60000    | 60000    | 60000    | 0                    | 0        | 55800 (MT) |   |
| Fresh Dom. Consumption | 54000    | 54000    | 54000    | 50000    | 50000    | 50000    | 0                    | 0        | 48000 (MT) |   |
| Exports, Fresh         | 2500     | 2500     | 2500     | 1500     | 1500     | 1500     | 0                    | 0        | 600 (MT)   |   |
| For Processing         | 7000     | 7000     | 7000     | 6500     | 6500     | 6500     | 0                    | 0        | 6000 (MT)  |   |
| Withdrawal From Market | 2500     | 2500     | 2500     | 2000     | 2000     | 2000     | 0                    | 0        | 1200 (MT)  |   |
| Total Distribution     | 66000    | 66000    | 66000    | 60000    | 60000    | 60000    | 0                    | 0        | 55800 (MT) |   |

Export Trade Matrix, Fresh Pears

# Export Trade Matrix

Country Greece

Commodity Pears, Fresh

Time Period  Units:   
 Exports for:    
 U.S.  U.S.

| Others            |                                  | Others      |                                  |
|-------------------|----------------------------------|-------------|----------------------------------|
| Cyprus            | 147                              | U.K.        | 20                               |
| Spain             | 23                               | Spain       | 1                                |
| Italy             | 5                                | Italy       | 13                               |
| Poland            | 10                               | Netherlands | 1                                |
| Germany           | 4                                | Germany     | 6                                |
| Hungary           | 3                                | >EU Total   | 41                               |
| >EU Total         | 192                              | Cyprus      | 165                              |
| Albania           | 264                              | Albania     | 1234                             |
| Russian Fed.      | 126                              | Bulgaria    | 703                              |
| FYROM             | 333                              | FYROM       | 395                              |
| Total for Others  | 915                              |             | 2538                             |
| Others not Listed | <input type="text" value="273"/> |             | <input type="text" value="647"/> |
| Grand Total       | 1188                             |             | 3185                             |

Import Trade Matrix, Fresh Pears

# Import Trade Matrix

Country Greece

Commodity Pears, Fresh

Time Period  Units:   
 Imports for:    
 U.S.  U.S.

| Others            |                                  | Others       |                                 |
|-------------------|----------------------------------|--------------|---------------------------------|
| Spain             | 8147                             | Spain        | 9886                            |
| Italy             | 1983                             | Italy        | 2012                            |
| Germany           | 996                              | Germany      | 591                             |
| Netherlands       | 565                              | Netherlands  | 195                             |
| France            | 207                              | France       | 154                             |
| Belgium & Lux.    | 35                               | Belg & Lux.  | 113                             |
| Ireland           | 15                               | >EU Total    | 12951                           |
| >EU Total         | 11948                            | Argentina    | 1415                            |
| Argentina         | 2184                             | South Africa | 811                             |
| South Africa      | 1273                             | Chile        | 215                             |
| Total for Others  | 15405                            |              | 15392                           |
| Others not Listed | <input type="text" value="725"/> |              | <input type="text" value="91"/> |
| Grand Total       | 16130                            |              | 15483                           |

## PS&amp;D Table, Fresh Grapes

## PSD Table

| Country                | Greece                         |                       |                   |               |                        |                   |               |                        |                   | L    |
|------------------------|--------------------------------|-----------------------|-------------------|---------------|------------------------|-------------------|---------------|------------------------|-------------------|------|
|                        | Commodity Grapes, Table, Fresh |                       |                   |               |                        |                   |               |                        |                   |      |
| Commodity              | 2005                           |                       |                   | 2006          |                        |                   | (HA)(MT) 2007 |                        |                   | MM   |
|                        | USDA Official                  | Revised Post Estimate | Post Estimate New | USDA Official | Estimate Post Estimate | Post Estimate New | USDA Official | Forecast Post Estimate | Post Estimate New |      |
| Market Year Begin      |                                | 01/2006               | 01/2006           |               | 01/2007                | 01/2007           |               | 01/2008                | 01/2008           |      |
| Area Planted           | 19500                          | 19500                 | 19500             | 19500         | 19500                  | 19500             | 0             | 0                      | 19600             | (HA) |
| Area Harvested         | 19500                          | 19500                 | 19500             | 19500         | 19500                  | 19500             | 0             | 0                      | 19500             | (HA) |
| Commercial Production  | 280000                         | 280000                | 280000            | 275000        | 275000                 | 275000            | 0             | 0                      | 220000            | (MT) |
| Non-Comm. Production   | 30000                          | 30000                 | 30000             | 25000         | 25000                  | 25000             | 0             | 0                      | 18000             | (MT) |
| Production             | 310000                         | 310000                | 310000            | 300000        | 300000                 | 300000            | 0             | 0                      | 238000            | (MT) |
| Imports                | 1500                           | 1500                  | 1500              | 2000          | 2000                   | 2000              | 0             | 0                      | 5000              | (MT) |
| Total Supply           | 311500                         | 311500                | 311500            | 302000        | 302000                 | 302000            | 0             | 0                      | 243000            | (MT) |
| Fresh Dom. Consumption | 175000                         | 175000                | 175000            | 172000        | 172000                 | 172000            | 0             | 0                      | 160000            | (MT) |
| Exports, Fresh         | 85000                          | 85000                 | 85000             | 83000         | 83000                  | 83000             | 0             | 0                      | 65000             | (MT) |
| For Processing         | 51500                          | 51500                 | 51500             | 47000         | 47000                  | 47000             | 0             | 0                      | 18000             | (MT) |
| Withdrawal From Market | 0                              | 0                     | 0                 | 0             | 0                      | 0                 | 0             | 0                      | 0                 | (MT) |
| Total Distribution     | 311500                         | 311500                | 311500            | 302000        | 302000                 | 302000            | 0             | 0                      | 243000            | (MT) |

Export Trade Matrix, Fresh Grapes

# Export Trade Matrix

Country Greece

Commodity Grapes, Table, Fresh

Time Period  Units:   
 Exports for:    
 U.S.  U.S.

| Others            |       | Others        |       |
|-------------------|-------|---------------|-------|
| Germany           | 33392 | Germany       | 30056 |
| U.K.              | 21855 | U.K.          | 16476 |
| Netherlands       | 7414  | Netherlands   | 9255  |
| Poland            | 5019  | Poland        | 4604  |
| Czech Repub.      | 1790  | Czech Republ. | 2047  |
| Other EU          | 5138  | Other EU      | 8221  |
| >EU Total         | 74608 | >EU Total     | 70659 |
| Bulgaria          | 3080  | Bulgaria      | 2548  |
| Ukraine           | 2430  | Ukraine       | 3340  |
| Romania           | 5562  | Romania       | 5668  |
| Total for Others  | 85680 |               | 82215 |
| Others not Listed | 5120  |               | 6516  |
| Grand Total       | 90832 |               | 88731 |

Import Trade Matrix, Fresh Grapes

# Import Trade Matrix

Country Greece

Commodity Grapes, Table, Fresh

Time Period  Units:   
 Imports for:    
 U.S.  U.S.

| Others            |                                 | Others       |                                 |
|-------------------|---------------------------------|--------------|---------------------------------|
| Germany           | 138                             | Germany      | 25                              |
| Netherlands       | 249                             | Netherlands  | 150                             |
| Italy             | 778                             | Italy        | 607                             |
| Spain             | 83                              | Spain        | 56                              |
| Sweden            | 200                             | U.K.         | 56                              |
| U.K.              | 572                             | Other EU     | 173                             |
| Other             | 63                              | >EU Total    | 1067                            |
| >EU Total         | 2083                            | South Africa | 197                             |
| Chile             | 241                             | Chile        | 189                             |
| South Africa      | 62                              | Cyprus       | 76                              |
| Total for Others  | 2386                            |              | 1529                            |
| Others not Listed | <input type="text" value="74"/> |              | <input type="text" value="77"/> |
| Grand Total       | 2460                            |              | 1606                            |