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Greece

Canned Deciduous Fruit

Semi-Annual

1999

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Report Highlights:

Low spring temperatures seriously affected the 1998 peach and apricot harvest. Peach deliveries to processors were 227,000 mt, up from last year but lower than normal. Withdrawals in 1998 declined to only 2,500 mt from 7,500 mt in 1997 and 390,000 mt in 1996. Apricots which also were seriously affected by the Sharka virus, had deliveries of an all time low of 3,000 mt. Canned mixture production showed and increase to 7,500 mt due to sourcing of cheaper inputs by the two leading canners. Exports of canned peaches to the US in 1997 were only 2,860 mt compared to 3,678 mt in 1996.

Includes PSD changes: Yes
Includes Trade Matrix: No

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Executive Summary

Low temperatures in mid March seriously affected the peach and apricot harvests for 1998 with peach deliveries to processors reaching 227,000 m.t. while apricot deliveries reached an all time record low of only 3,000 m.t. This low for apricots is attributed not only to the adverse weather conditions but the further expansion of the Sharka virus, which has affected the majority of the orchards. Canned mixture production showed a marked increase during 1998 and is presently estimated at 7,500 m.t. as compared to an all time record low of 1,809 m.t. produced in 1997. This increase is attributed to increased competitiveness by the two leading canners due to sourcing of cheaper inputs.

The quantities of peaches withdrawn in 1998 declined even further and totaled about 2,500 m.t. compared to 1997 withdrawals of about 7,500 m.t. and 390,000 m.t. in 1996. Estimates for apricot production and deliveries for 1998 were drastically reduced from the previous report (GR8025) due to more serious problems with the freeze and sharka virus tahn expected. Estimates for peaches were also revised downwards slightly from the figures shown in our annual report due to lower production than expected from the low temperatures.

Early frosts adversely affected not only the volume of the peach crop but also the quality of fruit delivered to processors. The average yield obtained was also low and averaged about 17.5 kgs of fresh clingstone peaches per 24/1 kg can/case.

Sales and shipments thus far are proceeding very satisfactorily. As of late January over 90 percent of the 1998 canned peach production had been contracted and about 60 to 70 per cent of that had lready been shipped. It is expected that ending stocks this marketing year will again be low and amount to about 9,000 m.t. if not lower. Exports of canned peaches to the US during the 1997 CY totaled 2,860 m.t. as compared to 3,678 m.t. during 1996. Ex-factory prices for canned half peaches this season for the various qualities started at relative low levels as reported in our last annual report,GR-8025,but have improved since and were quoted as follows:

Choice (24X1kg case)	\$ 18.20-19.40
Good standard (24X1kg case)	\$17.00-18.20
Standard (24X1kg case)	\$15.90-17.00

Production of canned mixtures during the 1998 MY bounced back after three years of low production to 7,500 m.t. due to improved competitiveness of the canners. It is worth noting that four plants processed canned mixtures this past season when only two processed canned mixtures during the 1997 year. The ex-factory prices for good standard and standard quality canned mixtures this season as compared to that of a year earlier were as follows:

	1998	1997
Dollars per 24X 1 kg Case		
Good standard quality	22.35-23.60	20.21-21.33
Standard quality	20.00-21.20	n.a.

Canned apricot production has been drastically revised downwards to 3,600 m.t. from that shown in our GR-8025. Compounding a shortage in availability was the poor quality of the fruit. Only two plants processed apricots this past season compared to seven that processed apricots during the 1997 season. An indication of the poor quality of fruit available is average yield of fresh fruit to canned product during the 1998 season was 17 kgs per 24/1kg case compared to 15.9 kgs (24/1kg can/case) during the 1997 campaign. Ex-factory prices of canned peeled apricots this season compared to those of a year earlier are as follows:

	1998	1997
Dollars per 24/1kg case		
Choice quality	23.50-24.70	n.a.
Good standard quality	21.20-22.35	20.21-22.46
Standard quality	18.80-20.00	16.84-19.65

Exchange Rates		
1997	\$1.00 U.S	=272.74 Drachmas
1998	\$1.00 U.S	=294.30 Drachmas
1999 (Jan-Feb)	\$1.00 U.S	=282.66 Drachmas

Canned Peaches PS&D Table

PSD Table						
Country:	Greece					
Commodity:	Canned Peaches					
		1996		1997		1998
	Old	New	Old	New	Old	New
Market Year Begin		07/1996		07/1997		07/1998
Deliv. To Processors	295000	295100	150000	147000	0	227000
Beginning Stocks	24305	24305	33805	62206	7805	14706
Production	378000	378485	180000	176000	0	265000
Imports	500	1323	500	3500	0	3000
TOTAL SUPPLY	402805	404113	214305	241706	7805	282706
Exports	361000	333907	200000	220000	0	265000
Domestic Consumption	8000	8000	6500	7000	0	9000
Ending Stocks	33805	62206	7805	14706	0	8706
TOTAL DISTRIBUTION	402805	404113	214305	241706	0	282706

Canned Mixtures PS&D Table

PSD Table						
Country:	Greece					
Commodity:	Canned Mixtures					
		1996		1997		1998
	Old	New	Old	New	Old	New
Market Year Begin		07/1996		07/1997		07/1998
Deliv. To Processors	0	0	0	0	0	0
Beginning Stocks	756	756	556	234	256	143
Production	4300	4300	1800	1809	0	7500
Imports	500	167	500	500	0	500
TOTAL SUPPLY	5556	5223	2856	2543	256	8143
Exports	4000	4139	1700	1600	0	7000
Domestic Consumption	1000	850	900	800	0	800
Ending Stocks	556	234	256	143	0	343
TOTAL DISTRIBUTION	5556	5223	2856	2543	0	8143

Canned Apricots PS&D Table

PSD Table						
Country:	Greece					
Commodity:	Canned Apricots					
		1996		1997		1998
	Old	New	Old	New	Old	New
Market Year Begin		07/1996		07/1997		07/1998
Deliv. To Processors	16150	16150	10100	10100	0	3000
Beginning Stocks	405	405	405	1144	305	804
Production	20100	20130	13000	12960	0	600
Imports	100	107	100	400	0	500
TOTAL SUPPLY	20605	20642	13505	14504	305	1904
Exports	19000	18298	12000	12500	0	3500
Domestic Consumption	1200	1200	1200	1200	0	1000
Ending Stocks	405	1144	305	804	0	404
TOTAL DISTRIBUTION	20605	20642	13505	14504	0	4904