



Foreign Agricultural Service

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## **The Netherlands**

### **Fresh Deciduous Fruit - Semi Annual Report**

**2000**

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#### **Report Highlights:**

**Both the Dutch and EU apple markets are saturated with low apple prices. This in contrast to the pear market. The Dutch and EU pear crops are down and prices are bullish. Export prospects for U.S. apples to the Netherlands seem dim, but U.S. pear exporters face good exports.**

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Includes PSD changes: No

Includes Trade Matrix: No

Semi-Annual Report

The Hague [NL1], NL

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## Apples

### Production

In December of 1999, the Dutch Product Board for Horticulture confirmed their 1999 summer forecast for the Dutch apple production at 507,000 metric tons (MT). This season, the quality of the fruit is very good but prices are weak as a consequence of over supplied apple markets in western Europe.

The Netherlands: Apple Production by Variety (July/June season/1,000 metric tons)						
Apple Variety	1994/95	1995/96	1996/97	1997/98	1998/99	1999/2000*
Elstar	190	185	150	135	170	190
Jonagold	175	190	140	108	123	145
Gold. Delicious	55	55	45	45	45	45
Cox's O.P.	55	45	50	50	47	45
Boscoop	45	45	30	35	35	55
Jonagored	-	-	-	37	42	50
Other Apples	80	75	75	60	45	45
<b>TOTAL</b>	<b>600</b>	<b>595</b>	<b>490</b>	<b>470</b>	<b>507</b>	<b>575</b>

\* Estimates

Source: Product Board for Horticulture

The Netherlands: Total Apple Acreage in Hectares						
	1994	1995	1996	1997	1998	1999
<b>Total</b>	16,480	15,307	15,137	15,191	14,683	14,403

Source: Central Bureau of Statistics

Apple Stocks in Selected EU Countries as of December (x 1,000 MT)			
	1997/98	1998/99	1999/00
Italy	1,200	1,237	1,298
France	944	717	860
Germany	265	330	326
Netherlands	280	295	310
Belgium	145	146	164
Spain	246	169	247
United Kingdom	70	119	124
Total	3,150	3,013	3,329

Source: Product Board for Horticulture

The November 1, 1999 apple stocks in a few selected west Europe countries were high and in most cases higher than the year before. These high stocks have a dampening effect on west European apple prices.

Although Dutch apple growers are receiving low prices for their apples, there are apparently few growers going out of business. Research of a large Dutch bank in cooperation with the Dutch Organization of Apple Growers (NFO) revealed that generally it is the smaller farm without a successor in the family that are discontinuing business. According to the NFO, consolidation already took place in 1992 and 1993 when apple prices were extremely low.

The Netherlands: Auction Prices for Apples (Dutch cents per kilo)						
	93/94	94/95	95/96	96/97	97/98	98/99*
Average Price	51	66	81	75	70	52
Apple Variety						
Golden Delicious	51	70	80	73	68	57
Boscoop	56	67	99	97	72	53
Jonagold	60	76	87	75	62	55
Cox's Orange	47	66	98	89	92	64
Elstar	58	80	102	89	96	62
Gloster	49	68	83	49	45	39
Processing Apples	17	23	32	27	21	17
one US\$ = Dfl	1.82	1.61	1.69	1.95	2.00	2.05

Source: Central Bureau of Statistics

### Consumption

In the first half year of 1999, Dutch apple consumption fell 10 percent below the same period in 1996. Dutch apple consumption has been continuously decreasing in recent years. In general fruit consumption is decreasing in the Netherlands, except for summer fruit such as plums, strawberries and cherries etc. It is mostly the younger generation who is eating less fruit.

### Trade

Dutch exports of domestically grown apples increased sharply in the first ten months of 1999, compared to the two preceding seasons. Germany imported much larger quantities of processing apples than usual so prices for apples for processing increased to 24 Dutch cts/kilo (5 UScts/lb). German demand for table apples was good. Exports to the U.K. were down because of a larger U.K. apple crop and three large U.K. food retail chains decided to sell domestic apples only. Also, the EU Commission decided that the U.K. apple growers were not eligible for a one million U.S. dollar promotion budget because British growers wanted to promote U.K. apples. EU rules require generic promotion of apples. The weak Russian currency had a detrimental effect on Dutch apple exports to Russia through October of 1999. However, a 25 percent smaller 1999/00 Russian apple crop could help Dutch apple exports this season.

Imports of U.S. apples into the Netherlands depend on EU market prices for apples and the relative supply of red apples in EU markets. Apple prices in the 1999/00 season are expected to be low so the export outlook for U.S. apples to the Netherlands is dim.

The Netherlands: Imports of USA Apples (Metric Tons)					
	1994	1995	1996	1997	1998
U.S.A.	4,944	3,068	650	373	1,907

Source: Central Bureau of Statistics

## Pears

Total Dutch pear production in 1999/00 is still estimated at 125,000 MT, the smallest crop in five years. Also the total EU crop is down, by seven percent. EU pear markets are bullish.

The Netherlands: Pear Production by Variety Season July-June in 1,000MT						
Pear Variety	1994	1995	1996	1997	1998	1999*
Conference	75	90	80	85	90	85
Doyenne du C.	25	35	20	30	25	20
Other Pears	40	40	35	30	25	20
<b>TOTAL</b>	<b>140</b>	<b>165</b>	<b>135</b>	<b>145</b>	<b>140</b>	<b>125</b>

\* Estimated

The Netherlands: Total Pear Acreage in Hectares						
	1994	1995	1996	1997	1998	1999
<b>Total</b>	5,732	5,885	5,934	6,026	5,939	6,140

Source: Central Bureau of Statistics

Pear Stocks in Selected EU Countries as of November (x 1,000 MT)			
	1997/98	1998/99	1999/00
Italy	161	300	265
Netherlands	73	65	60
Belgium	58	56	62
Spain	139	153	154
<b>Total</b>	<b>350</b>	<b>351</b>	<b>343</b>

Source: Product Board for Horticulture

The Netherlands: Average Auction Prices for Pears (Dutch Cents per kilo)						
	1993/94	1994/95	1995/96	1996/97	1997/98	1998/99*
<b>Total Average</b>	75	91	83	95	127	106
Legipont	46	71	58	71	90	68
Beurre Hardy	46	66	53	65	135	63
Conference	86	100	99	99	138	118
Doyenne du C.	75	103	85	116	138	123
Cooking Pears	68	66	52	81	92	85

Source: Product Board for Horticulture

### Trade

The Netherlands is a large importer and exporter of pears. Imports of non-EU pears, mostly for re-exports play an important role in the market. It can be expected that exports of U.S. pears in the 1999/00 season will be at least equal to the 1998/99 season.

The Netherlands: Imports of non-EU Pears (Metric Tons)					
	1994	1995	1996	1997	1998
Chile	37,051	33,759	31,759	29,739	31,001
S-Africa	268	329	7,593	10,821	15,151
Argentina	15,991	20,882	11,565	11,983	16,518
<b>U.S.A.</b>	<b>3,209</b>	<b>3,045</b>	<b>2,951</b>	<b>3,130</b>	<b>7,775</b>
Others	1,078	823	1,192	2,522	2,414
<b>Total</b>	<b>57,597</b>	<b>58,838</b>	<b>55,060</b>	<b>58,195</b>	<b>72,859</b>

Source: Eurostat