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The Netherlands

Fresh Deciduous Fruit

Annual

2000

Approved by:
Phil Letarte
U.S. Embassy, The Hague
Prepared by:
Wendalin Kolkman/Mary-Ann Kurvink

Report Highlights:
Recent EU apple overproduction and low prices, decreasing consumption, and heavy competition has lead to serious financial problems for Dutch apple growers. Both apple and pear growers are facing stronger environmental rules compared to their EU partners.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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Table of Contents

Executive Summary

- The quantity of the 2000 Dutch apple crop is expected to decrease by 11 percent to 510,000 MT. This smaller crop of good quality, in conjunction with a EU wide decrease of about 5 percent in apple production, may create a favorable 2000/01 EU apple market.

- Recent EU apple overproduction and the resulting low prices, decreasing consumption, and heavy competition during the past few years has lead to serious financial problems for Dutch apple growers. The cost of apple production is around 100 Dutch cents per kilo and the average 1999/00 apple price was only 48 Dutch cents.

- In response, smaller and less efficient apple growers are disappearing and the remaining growers and cooperatives are trying to better coordinate their marketing efforts.

- In contrast to the apple sector, the Dutch pear growers benefitted from favorable prices over the past few years. In 1999/00, pear prices were excellent. The Dutch 2000 pear crop is expected to increase in quantity by 33 percent to 180,000 MT. Prices are likely to be as high, or higher, than levels in 1999/00.

- Both apple and pear growers in The Netherlands sometimes face stronger environmental rules compared to those applied in the rest of the EU. Fears of losing their competitive position have lead to efforts to combine marketing and export efforts for Dutch fruit.

Outlook for U.S. Apple & Pear Exports to the Netherlands

- For apples, opportunities for U.S. exports to the Netherlands and western Europe are fairly dim, especially for large quantities. However, the tight EU pear market and relatively high prices provide a much better outlook for U.S. pear exports to the Netherlands, although most of the pears would eventually be re-exported to other European countries and Russia.

Exchange Rate			
Year	**U.S. $**	**EURO**	**Dutch florin (guilder)**
1998	1	-	1.98
1999	1	0.94	2.07
2000	1	1.04*	2.29*

Note: For 2000 exchange rates are only available for the first six months

Apples

Production

PSD Table						
Country	Netherlands					
Commodity	Fresh Apples				(HA)(1000 TREES)(MT)	
	Revised	**1998**	**Preliminary**	**1999**	**Forecast**	**2000**
	Old	**New**	**Old**	**New**	**Old**	**New**
Market Year Begin		**07/1998**		**07/1999**		**07/2000**
Area Planted	14,683	14,683	14,191	14,191	0	13,501
Area Harvested	12,828	12,828	12,339	12,339	0	11,739
Bearing Trees	25,000	25,000	25,000	25,000	0	25,000
Non-Bearing Trees	6,000	6,000	6,000	6,000	0	6,000
Total Trees	31,000	31,000	31,000	31,000	0	31,000
Commercial Production	457,000	457,000	518,000	518,000	0	457,000
Non-Comm. Production	50,000	50,000	57,000	57,000	0	53,000
TOTAL Production	507,000	507,000	575,000	575,000	0	510,000
TOTAL Imports	235,944	235,944	240,000	311,520	0	386,285
TOTAL SUPPLY	**742,944**	**742,944**	**815,000**	**886,520**	**0**	**896,285**
Domestic Fresh Consump	298,988	298,988	300,000	346,826	0	350,294
Exports, Fresh Only	338,956	338,956	405,000	382,292	0	386,115
For Processing	100,000	100,000	100,000	143,300	0	144,733
Withdrawal From Market	5,000	5,000	10,000	14,102	0	15,143
TOTAL UTILIZATION	**742,944**	**742,944**	**815,000**	**886,520**	**0**	**896,285**

The 2000 Dutch apple crop will be smaller than the preceding year, but of good quality. In spite of favorable weather conditions during the blooming and growing season, the estimated production decreased by 11 percent to 510,000 MT. This decrease is due to a shrinking of planted area with 4 percent. An expected 5 percent decrease in EU apple production is likely to have a favorable effect on EU apple prices in the coming season.

Low apple prices in recent years have deepened the problems of the Dutch apple sector. Higher production and decreasing consumption increase competition among European suppliers. With apple imports from southern hemisphere countries intensify the problem. EU up-rooting schemes are still too small to be really effective. The result is disappearance of the smaller, less efficient growers. However, some producers are working to develop new varieties in order to meet consumer preferences. Although consumers prefer a broad variety of apples, the assortment of apples has shrunk.

The Netherlands: No. of Farms with Apples and Pears and the Acreage			
	Apples	**Pears**	**Total Acreage**
1990	3,523	2,923	21,442
1997	2,794	2,553	21,217
1998	2,623	2,431	20,621
1999	2,510	2,372	20,211
1990/99	- 29 percent	- 19 percent	- 6 percent

Source: CBS

Although the area planted with Elstar apples grown slightly in 2000, the production of this leading variety is expected to decrease by 5 percent to 180,000 MT. This decrease is partly due to hail damage and skin coarsening. The varieties Jonagold and Jonagored are expected to decrease by 7 and 10 percent, respectively. The decrease in production of Cox's Orange Pippin and Boskoop will be even stronger. The decrease in apple production is mainly caused by the shrinkage of planted area.

The Netherlands: Apple Production by Variety (July/June season/1,000 metric tons)						
	1995/96	**1996/97**	**1997/98**	**1998/99**	**1999/2000**	**2000/2001***
Apple Variety						
Elstar	185	150	135	170	190	180
Jonagold	190	140	108	123	145	135
Gold. Delicious	55	45	45	45	50	45
Cox's O.P.	45	50	50	47	55	40
Boskoop	45	30	35	35	45	30
Jonagored	-	-	37	42	45	40
Other Apples	75	75	60	45	45	40
TOTAL	**595**	**490**	**470**	**507**	**575**	**510**

* Estimates
Source: Product Board for Horticulture

In the beginning of the season, Dutch apples of the new crop need permission from the Dutch quality control organization KCB to be sold. KCB considers if the apples are ripe enough to be traded. Imported apples are not controlled. Because unripe fruit is disastrous for the image of a variety, KCB decides, every summer, which apple varieties should be announced to their organization. In 2000, these varieties are James Grieve, Delcorf, Alkmene, Cox's Orange Pippin, Elan and Elstar. All apple varieties also have to meet the basic quality criteria of the Dutch quality control organizations KCB (Kwaliteits-Controle-Bureau), AID (Algemene Inspectiedienst) and PD (Plantenziektenkundige Dienst).

While both the EU and the Dutch want to use less chemicals in fruit production, Dutch growers complain that their government’s desire to be a leader in this area hinders the Dutch fruit industry’s competitiveness and could lower fruit quality. For example, Dutch growers face the withdrawal of 24 approved chemical plant protection products in 2000, as opposed to January 1, 2003 for other EU growers. Since January 1, 2000, the Dutch parliament has forbidden the use of 13 chemical plant protection products, but there is still debate on eleven “indispensable” protection products, such as Carbaryl, Fenbutatin and Parathion. The prohibition of the nine indispensable protection products may result in disappearance of some apple and pear varieties. To protect fruit trees without these chemicals, more labor is needed, causing higher prices. Production volume will probably decrease.

In other countries like Belgium, France and Spain, the protection products mentioned above are still permitted. Apples and pears imported from New Zealand and Chile are not tested for protection products. In addition, more than half of the 2000 apple and pear farms in the Netherlands follow the lines of the ecological control mark organization MBT. This means that growers minimize the use of chemical plant protection products and make use of nature to solve problems. For example, kestrels are used to catch mice, while predatory mites are used to deal with butterfly eggs, small caterpillars etc.

The Dutch production of organic apples lags behind, especially compared to Italy and North Germany, but it is growing. In 1999, ten farms started to grow organic apples stimulated by a once-only subsidization of US$ 884 per acre, while three farms started in 1998. In 2000, in total 40 Dutch farms grow organic apples. The biological sales organization Odin sells organic Yellow apples to health-food shops, by fruit and/or vegetable subscriptions and to the British market. Because of the small supply of Yellows from July until September, Orion imports organic apples from Italy for re export to the United Kingdom. Dutch supermarket chains are only interested in selling organic apples if the price decreases.

Of the 2000 total fruit acreage, 92 percent is devoted to apples and pears. However, the area planted with apples is decreasing. For example, the area planted with Cox’s Orange Pippin shrank with 14 percent to 850 hectares in 2000. Only the area planted with Elstar apples increased slightly.

The Netherlands: Apple Acreage in Hectares

Apple Variety	**1992 !**	**1997**	**1999 "**	**2000***
Golden Delicious	1,583	1,192	898	850
Cox's Orange Peppin	2,087	1,503	989	850
Belle de Boskoop	1,542	1,281	1,144	1,028
James Grieve	545	205	-	-
Gloster	409	160	-	-
Elstar	4,794	5,127	5,595	5,625
Jonagold	3,775	4,598	3,195	2,927
Other varieties	2,248	1,125	2,370	2,221
TOTAL	**16,983**	**15,191**	**14,191**	**13,501**

! Source: Central Bureau of Statistics (Note: This data is published every five years)
" Source: Product Board for Horticulture
* Note: Estimated

Consumption
Dutch households purchase, on average, more than US$ 24 on apples and US$ 6 on pears each year. In 1999, spending on apples made up 25 percent of total spending on fruit, which was worth US$ 120 per household per year. Supermarkets had a 66 percent market share in fruit sales in 1999, compared to 61 percent in 1996. The total supermarket sales of apples in the Netherlands was US$ 40.4 million.

The high quality and enormous volume of the 1999 apple crop caused an increase in market volume during the first half of 2000. Because of the large supply of apples, consumers profited by decreasing prices. Bulk varieties, like Elstar and Jonagold, benefitted particularly well. In order to heighten consumer awareness of apples and the range of varieties available, the Product Board for Horticulture, auctions/sales organizations, and supermarkets organized promotional campaigns. The campaigns partly focus on the nutritional aspects of apples in an effort to capitalize on the growing consumer interest in health foods. Recent consumer research showed that consumers prefer a broad variety of fresh fruit which is organically grown. In contrast, the assortment of apples and pears has actually been declining. Therefore, some Dutch producers funded by the Product Board for Horticulture are working to develop new varieties in order to meet consumer preferences.

To promote the consumption of apples, supermarket chains try to profile their supermarket formula by emphasizing the cultivation technique which were used, promotional activities, presentation, productinformation, and private labels. For example, supermarket chain Super De Boer has sold its own apple brand Tentation since November 1999, while supermarket chain C1000 does the same with Roblos. Apples are bestsellers in supermarkets and make up a large product group. Therefore, they can brighten up the fruit and vegetables department in supermarkets. Although some apples are packed in bags or in trays, most apples are sold individually, because of this, apples and pears have still an image of bulk products. When apples and pears are offered in trays, the turnover will grow.

The Netherlands: Fruit Consumption in kilos per 100 Households, in first half year

	1996	1999	change
Apples	1,531	1,385	-10%
Pears	341	263	-23%
Grapes	61	68	11%
Oranges	1,485	1,354	-9%
Bananas	752	765	2%
Other fruits	1,091	1,168	7%
All Fruits	**5,261**	**5,003**	**-5%**

Source: Product Board for Horticulture

Prices
Auction prices for apples have remained low over the past several years, largely due to abundant worldwide supply of apples and other fruit. Low returns to Dutch growers have caused serious financial distress to 50 percent of the fruit growers, with an increasing number of growers discontinuing operations. The cost of apple production is around 100 Dutch cents per kilo and the average 1999/00 apple price was only 48 Dutch cents. Apple prices are expected to grow slightly until the end of 2000. Supplies may drop after January 2001, with perhaps some further increase in prices, but new crop apples from southern hemisphere countries will begin again around mid-April, 2001.

The Dutch, German and Belgium fruit producers associations want a stricter policy on quality to raise apples prices. Since February 2000, large Jonagold apples of less quality have been offered to the processing industry instead of the fresh-market. Partly due to this intervention, growers have gotten better prices. Therefore, the three countries want a similar approach for other varieties. In September 2000, a proposal on this will be put to the European growers' organization Copa-Cogeca. In addition, from September 15, 2000, no apples from the former crop may enter the markets of the three countries anymore, to give room to the new crop. The three countries also want to make an agreement on standards for hardness and sugar content for apples and pears. European criteria for minimum standards already exist, but the Netherlands, Belgium and Germany want more attention for these qualities, along with size standard and color scheme.

The Netherlands: Auction Prices for Apples
(Dutch cents per kilo)

	94/95	95/96	96/97	97/98	98/99	99/00*
Average Price	66	81	75	70	53	48
Apple Variety						
Golden Delicious	70	80	73	68	61	57
Boskoop	67	99	97	72	54	49
Jonagold	76	87	75	62	54	58
Cox's Orange	66	98	89	92	64	56
Elstar	80	102	89	96	63	70
Gloster	68	83	49	45	41	48
Processing Apples	23	32	27	21	17	23
one US$ = Dfl	1.61	1.69	1.95	2.00	2.07	2,29

Source: Central Bureau of Statistics
* July 99 thru June '00 only

Dutch growers have realized that they must coordinate efforts to solve the financial problems in the sector. The two largest cooperative fruit sales organizations, Coöperatie Fruitmasters Groep U.A. and The Greenery International B.V., have decided to join forces. Together, the sales organizations have a market share of approximately 70 percent in apples and pears. The remaining 30 percent is directly purchased from growers. Fruitmasters and The Greenery are now trying to establish one large, national, apple and pear marketing organization to supply high quality fruit to domestic and foreign customers.

Trade
The Netherlands is a large trader of fresh apples, with imports from EU origins and overseas, including Chile, Argentina and, increasingly, South Africa. Not all of these apples are consumed by the Dutch. Most of the Dutch exports and re-exports of apples go via Rotterdam to neighboring EU countries and Scandinavia, although Russia has been an important destination in the last five years as well. It is expected that apple imports from the southern hemisphere countries will decrease by more than 20 percent because of high freight costs due to high oil prices, a high US dollar rate (the countries offer their apples in US dollars) and low apple prices in the EU due to a large supply. However, the prices of processing apples are reasonable. In addition, the apple production in Chile, Argentina and South Africa should decrease 10 percent compared to the previous year due to unfavorable weather conditions.

The Netherlands: Imports of Apples from Selected Overseas Origins (Metric Tons)

Calender Year	1995	1996	1997	1998	1999
U.S.A.	3,068	650	377	1,946	1,609
Chile	61,288	53,486	47,189	57,635	67,873
Argentina	39,535	21,456	27,176	22,294	22,759
Brazil	8,691	2,712	18,715	7,350	35,089
South Africa	-	9,178	14,262	32,251	34,095
TOTAL	112,582	87,482	107,719	121,476	161,425

SOURCE: Central Bureau of Statistics

Jonagold apples have the largest share in Dutch apple exports, followed by Elstar. Germany is the most important export destination for Dutch Jonagold apples, followed by Russia, Sweden and Finland. Elstar apples are mainly exported to Germany and France. In 2000, exports of Jonagold and Cox's Orange Peppin have grown, especially to Germany. The foreign demand for Dutch apples is expected to be strong. This is due to a decrease by 5 percent of the EU apple crop. Germany, the largest export market for Dutch apples, expects a 10 percent smaller crop compared to the preceding year. In addition, the EU apple stocks of the old crop are almost cleared.

Since September 1999, the dominant British food retailer Sainsbury has not sold Dutch apples in its supermarkets. Sainsbury wants to promote British apples, although this is against the European advertisement codes. In 1999, export of Dutch apples to the United Kingdom decreased 30 percent compared to the preceding year.

EU apple exports to Russia have helped limit the fall of prices but exports to Russia dropped sharply after their monetary crisis in 1998. This situation may be corrected in the coming season because the Russian apple crop is estimated 45 percent less than average, due to severe night frost during the blooming season. Other east European countries, especially Poland, face similar problems.

The Netherlands: Exports of Domestic Apples and Re-Exports of Imported Apples to East European Countries
(Metric Tons)

	1996		1997		1998		1999	
	Exports	Re-Exports	Exports	Re-Exports	Exports	Re-Exports	Exports	Re-Exports
Russia	34,191	74,048	26,342	44,148	19,547	25,522	17,999	20,730
Poland	5,381	4,053	2,959	2,508	1,845	1,675	3,061	3,606
Estonia	2,143	1,655	1,022	509	1,267	841	2,821	1,111
Latvia	2,169	1,918	1,336	1,026	1,252	520	2,488	939
Lithuania	1,232	845	734	456	898	386	2,275	498
Czech Rep.	5,774	597	4,786	416	2,543	495	6,954	773
Croatia	39	39	26	76	13	91	116	111
Slovenia	-	4	-	12	-	4	43	13
Hungary	1	404	12	421	69	504	33	444

Source: Product Board for Horticulture

Trade Matrices

Import Trade Matrix			
Country	Netherlands		
Commodity	Fresh Apples		
Time period	CY	Units:	Metric Tons
Imports for:	**1998**		**1999**
U.S.	1,946	U.S.	1,609
Others		Others	
E.U.	102,933	E.U.	131,187
- France	67,652	- France	55,509
- Belgium/Lux	53,790	- Belgium/Lux	60,125
- Germany	8,572	- Germany	4,190
South Africa	32,269	South Africa	34,095
Brazil	7,350	Brazil	35,089
Chile	57,243	Chile	67,873
Argentina	22,294	Argentina	22,759
New Zealand	6,310	New Zealand	14,355
Total for Others	228,399		305,358
Others not Listed	5,599		4,553
Grand Total	**235,944**		**311,520**

Export Trade Matrix			
Country	Netherlands		
Commodity	Fresh Apples		
Time period	CY	Units:	Metric Tons
Exports for:	**1998**		**1999**
U.S.	22	U.S.	8
Others		Others	
E.U.	271,748	E.U.	307,598
- France	18,577	- France	16,221
- Belgium/Lux	18,537	- Belgium/Lux	15,132
- Germany	172,970	- Germany	210,268
- U.K.	29,660	- U.K.	20,633
Poland	2,773	Poland	5,842
Czech Rep.	2,558	Czech Rep.	6,195
Russia	51,252	Russia	34,390
Belarus	1,362	Belarus	6,367
Total for Others	329,693		360,392
Others not Listed	9,241		21,892
Grand Total	**338,956**		**382,292**

U.S. Export opportunities

Europe is harvesting a normal apple crop. Therefore, it is expected that the average auction prices for apples in the 2000/01 season will be reasonable. Since U.S. apple exports to Europe are largely dependent on availability and prices in Western Europe, the 2000/01 outlook for U.S. exports to The Netherlands, and the rest of the EU, appear more promising than the last couples of years.

The Netherlands: Imports of USA Apples
(Metric Tons)

	1995	1996	1997	1998	1999
U.S.A.	3,068	650	377	1,946	1,609

Source: Central Bureau of Statistics

Apple Juice

The Netherlands does not produce much apple juice. Most of the juice is produced abroad. Germany is the largest supplier of either concentrated or single strength apple juice to the Netherlands. In 1999, German juice producers bought four times the amount of Dutch industry apples (98,000 MT) than in the preceding year.

Dutch consumers drink on average 27 liters fruit juice per year and consumption is still increasing. In 1998, the consumption of apple juice was 6 liters per capita, second to orange juice. In 1999 organic juices had a market share of only 0.5 percent in the Dutch juice market. A 2.5 percent market share is estimated in 2003.

Although no figures on juice production exist in the Netherlands, it is clear that more and more growers are beginning to produce high quality juice by themselves. Compared to large Dutch juice producers like Riedel, Vrumona and Hero, volumes are still small, but new brands appear frequently. To stress quality, locally produced juice is often related to a specific region in the Netherlands, like "Limburg Land" apple and pear juice with an organic label.

The Netherlands: Juice Consumption
(liters/capita)

	1997	1998	1999*
Total Juice	26.3	27.0	27.7
Orange Juice	13.9	14.4	14.9
Apple Juice	5.8	6.0	6.2
Grapefruit Juice	0.8	0.8	0.8
Other Juices	5.8	5.8	0.8

*Ag Affairs Office estimates
Source: Product Board for Horticulture

Pears

Production

PSD Table						
Country	Netherlands					
Commodity	Fresh Pears				(HA)(1000 TREES)(MT)	
	Revised	**1998**	**Preliminary**	**1999**	**Forecast**	**2000**
	Old	**New**	**Old**	**New**	**Old**	**New**
Market Year Begin		**07/1998**		**07/1999**		**07/2000**
Area Planted	5,939	5,939	6,140	6,140	0	6,206
Area Harvested	5,322	5,322	5,372	5,372	0	5,426
Bearing Trees	6,600	6,600	6,600	6,600	0	6,600
Non-Bearing Trees	1,300	1,300	1,300	1,300	0	1,300
Total Trees	7,900	7,900	7,900	7,900	0	7,900
Commercial Production	126,000	126,000	113,000	121,000	0	164,000
Non-Comm. Production	14,000	14,000	12,000	14,000	0	16,000
TOTAL Production	140,000	140,000	125,000	135,000	0	180,000
TOTAL Imports	95,250	95,250	110,000	114,511	0	133,978
TOTAL SUPPLY	**235,250**	**235,250**	**235,000**	**249,511**	**0**	**313,978**
Domestic Fresh Consump	84,996	84,996	60,000	89,841	0	108,708
Exports, Fresh Only	145,054	145,054	170,300	149,531	0	180,932
For Processing	5,000	5,000	4,500	10,139	0	24,338
Withdrawal From Market	200	200	200	0	0	0
TOTAL UTILIZATION	**235,250**	**235,250**	**235,000**	**249,511**	**0**	**313,978**

The 2000 Dutch pear crop is expected to be 180,000 MT, an increase of 25 percent compared to 1999, and the largest ever. This increase is due to favorable weather conditions during the blooming and growing season and an increasing area planted with pears. The production of leading pear variety Conference is expected to increase by 21 percent to 120.000 MT. The variety Doyenné du Commice is expected to increase by 33 percent. The production of cooking pears varieties St. Remy and Gieser Wildeman should also grow.

Because of the weather, the quality of the Dutch pear crop is excellent. Therefore, it is hard for countries like Italy and Spain to compete on quality. Organic pears are hardly grown in Europe. Therefore, organic pears offer another opportunity for Dutch growers.

The Netherlands: Pear Production by Variety Season July-June in 1,000MT						
Pear Variety	**1995/96**	**1996/97**	**1997/98**	**1998/99**	**1999/00**	**2000/01***
Conference	90	80	85	90	95	120
Doyenne du C.	35	20	30	25	20	30
Other Pears	40	35	30	25	20	30
TOTAL	**165**	**135**	**145**	**140**	**135**	**180**

* Estimated
Source: Product Board for Horticulture

In January 1999, the British supermarket chain Tesco stopped sales of imported Dutch and Belgium pears after discovering high concentrations of the growth retardant cloremequat (CCC). Pear growers in the United Kingdom are not allowed to use CCC in pear growing and the EU only allows the use of CCC with a maximum residue level of 3 parts per million (ppm). Tesco found levels of 15 to 20 ppm. However, since February 2000 the Dutch fruit auctions and traders who purchase directly from growers have to ensure that all pears they bring in the market are inspected for CCC by the research organization TNO.

The Netherlands: Pear Acreage by Variety in Hectares				
Pear Variety	**1992 !**	**1997**	**1999 "**	**2000***
Conference	2,586	3,445	3,814	3,996
Doyenne	1,159	1,274	1,138	1,136
Beurre Hardy	239	215	-	-
Other varieties	1,421	1,092	1,068	1,074
TOTAL	**5,405**	**6,026**	**6,020**	**6,206**

! Source: Central Bureau of Statistics (Note: This data was published once every five years)
" Source: Product Board for Horticulture
* Note: Estimated

Nowadays, many growers replace apple trees by pear trees, which are more profitable because of higher prices in recent years. The Conference variety is by far the most popular variety in the EU and the Netherlands. In the next couple of years, the Dutch production of Conference pears will grow strongly, because of all the investments in this variety (planting trees and enlarging planted area). Since the Dutch market for pears is limited, extra pear production would be exported.

Prices
In contrast to apples, pears prices have been good during the last couple of years and were excellent in 1999/00. As the total EU pear crop is expected to decrease by 6 percent in 2000/01, pear prices are likely to remain on the same level or may increase.

The Netherlands: Average Auction Prices for Pears (Dutch Cents per kilo)						
	1994/95	**1995/96**	**1996/97**	**1997/98**	**1998/99**	**1999/00***
Total Average	91	83	95	127	110	131
Legipont	71	58	71	90	68	94
Beurre Hardy	66	53	65	135	63	77
Conference	100	99	99	138	123	137
Doyenne du C.	103	85	116	138	123	126
Cooking Pears	66	52	81	92	85	170
one US$ = Dfl	1.61	1.69	1.95	2.00	2.07	2,29

* July 99 thru June '00
Source: Product Board for Horticulture

Trade

The Netherlands is a large importer and exporter of pears. Imports are usually about 100,000 MT, with the EU supplying 25 percent and overseas countries like South Africa, Argentina and Chile others supplying the remaining 75 percent. Almost all Chilean pears destined for the EU market are traded via the Netherlands. It is expected that pear imports from South Africa and Argentina will decrease because of high freight costs due to high oil prices, a high dollar rate (both countries offer their apples in US dollars), and lower production of some varieties due to unfavorable weather conditions.

The Netherlands: Imports of non-EU Pears (Metric Tons)					
	1995	**1996**	**1997**	**1998**	**1999**
Chile	33,759	31,759	29,739	31,229	31,702
S-Africa	329	7,593	10,821	15,198	19,316
Argentina	20,882	11,565	11,983	16,518	22,965
U.S.A.	**3,045**	**2,951**	**3,130**	**7,800**	**5,249**
Others	823	1,192	2,522	3,848	2,913
Total	**58,838**	**55,060**	**58,195**	**74,593**	**82,145**

Source: Eurostat

Approximately 80 percent of the Dutch pear export consist of the variety Conference. Total export is usually at about 150,000 MT, except in years with very high EU pear prices. Although prices in the 1999/00 season were high, foreign demand pushed exports to record levels. It is expected that 2000/01 Dutch pear export will be fairly high, given a EU wide tight pear market and expected higher pear prices. The United Kingdom is by far the most important export destination for Dutch pears, followed by Russia, Sweden, France and Norway. In spite of the growing exports to Scandinavian countries, the increase of the total exports is slowing down. Because of the continuing economic crisis in Russia, exporting to this market remains difficult. However, when the Dutch can meet the strict quality requirements of British supermarkets, the Netherlands could increase market share to the U.K. Germany also offers opportunities.

Trade Matrices

Import Trade Matrix			
Country	Netherlands		
Commodity	Fresh Pears		
Time period	CY	Units:	Metric Tons
Imports for:	**1998**		**1999**
U.S.	7,775	U.S.	5,249
Others		Others	
E.U.	22,391	E.U.	32,366
- France	3,924	- France	5,676
- Belgium/Lux	12,811	- Belgium/Lux	20,110
- Spain	1,881	- Spain	2,326
South Africa	15,151	South Africa	19,316
Chile	31,001	Chile	31,702
Argentina	16,518	Argentina	22,965
Total for Others	85,061		106,349
Others not Listed	2,414		2,913
Grand Total	**95,250**		**114,511**

Export Trade Matrix			
Country	Netherlands		
Commodity	Fresh Pears		
Time period	CY	Units:	Metric Tons
Exports for:	**1998**		**1999**
U.S.		U.S.	9
Others		Others	
E.U.	106,475	E.U.	110,028
- France	13,380	- France	11,210
- Germany	28,722	- Germany	37,772
- U.K.	39,289	- U.K.	30,679
- Denmark	5,052	- Denmark	6,632
Estonia	1,203	Estonia	1,658
Latvia	1,747	Latvia	3,316
Lithuania	1,299	Lithuania	1,534
Poland	784	Poland	2,805
Russia	28,916	Russia	22,958
Total for Others	140,424		142,299
Others not Listed	4,630		7,223
Grand Total	**145,054**		**149,531**

U.S. Export Opportunities

The outlook for U.S. pear exports in the 2000/01 season is good given the tight EU pear market and the expected high price level. The United States is a fairly stable supplier of the Anjou pear to the Netherlands. However, Dutch imports of U.S. pears in 1999 decreased 33 pecent compared to the previous year. Most pears are re-exported all over Europe and Russia, only 2 percent or less remain in the Netherlands.

The Netherlands: Imports of U.S. Pears
(Metric Tons)

Year	Metric Tons	Year	Metric Tons	Year	Metric Tons
1987	570	1992	2,517	1997	3,130
1988	1,957	1993	2,044	1998	7,800
1989	3,513	1994	3,207	1999	5,249
1990	4,057	1995	3,050		
1991	1,997	1996	2,950		

Source: Central Bureau of Statistics