

**Voluntary Report** – Voluntary - Public Distribution

**Date:** August 18,2020

**Report Number:** E42020-0049

**Report Name:** Prognosfruit 2020

**Country:** European Union

**Post:** Berlin

**Report Category:** Fresh Deciduous Fruit

**Prepared By:** Sabine Lieberz

**Approved By:** Kimberly Sawatzki

**Report Highlights:**

On August 6, 2020, the World Apple and Pear Association (WAPA) presented the 2020 EU apple and pear crop forecast at the first ever online edition of the 45th Prognosfruit convention. WAPA forecasts the 2020 EU fresh apples crop at 10.7 million metric tons (MT), 1 percent below the 2019 harvest and 4 percent below the average of the preceding ten years. Production of fresh pears is forecast at 2.2 million MT. This is an increase of 12 percent compared to 2019, but still 3 percent below the 10-year average. This forecast reflects the situation as of mid-July. COVID-19 initially pushed consumption of apple and pears. The long-term effect is less clear as consumers have to balance their demand for healthy food with increased economic pressure.

**General Information:**

Prognosfruit is the annual European crop forecast colloquium for apples and pears. Since 2010, it also covers concentrated apple juice (CAJ). Due to the COVID-19 pandemic, Prognosfruit 2020 was held as an online event on August 6, 2020, with more than 150 participants from 26 countries. Prognosfruit 2021 is planned for August 4-6, 2021, in Novi Sad /Serbia.

All forecast are based on information available in mid-July.

**Abbreviations:**

EU = European Union  
MS = EU member state(s)  
MT = metric ton(s)  
WAPA = World Apple and Pear Association

## Forecast for Apples

WAPA forecasts the EU crop for apples in 2020 at 10.7 million MT<sup>1</sup>. This is a decrease of 1 percent compared to the 2019 harvest and 4 percent below the average of the preceding ten years. The forecast number includes 511,000 MT of organic apples.

Philippe Binard from WAPA presented the apple forecast and Helwig Schwartau from *Agrarmarkt Informations-Gesellschaft mbH* (AMI), Germany, reported on the outlook for MY 2020/21. Their major points were:

On EU production:

- Spring frosts negatively impacted production in Central and Eastern parts of the EU.
- In Spain, France, and Portugal, production declined due to alternate bearing, in Belgium because of a reduction in area.
- In contrast, production rebounded in Poland, the Baltics, and Scandinavia.
- Organic production is forecast to increase to 511,000 MT compared to 476,000 MT in 2019. While this is an increase of 7 percent year on year, organic production contributes only 4.8 percent of total apple production. A share that is still way below the EU's 25 percent target.
- It is expected that 69 percent of production will be consumed fresh, while 31 percent will be processed (2019/20: 70 percent fresh/30 percent processing.)
- Harvest is expected to start a week earlier than normal.
- Fruit size is average to big in most countries with the exception of Austria and Hungary, where it is small.
- Farmers and processors are concerned about a potential lack of availability of seasonal workers for harvesting and processing due to COVID-19.

On market conditions:

- Low stocks should ensure good marketing opportunities at the beginning of the season.
- High non-commercial backyard production in Germany (850,000 MT) may lead to 10 to 15 percent lower apple purchases in the fall months in Germany.
- The slightly larger availability of processing apples should not have a negative effect on prices this year as stock of concentrated apple juice (CAJ) juice are depleted.
- In addition, China expects a 10-percent lower apple crop due to alternate bearing. As a result, Chinese CAJ production should be significantly lower, which in turn would lead to less competition on the world market.
- EU exports to the Middle East have severely declined in MY 2019/20 due to competition from U.S. Red Delicious apples.
- EU exports to Latin America are expected to decrease in MY20/21 because COVID related logistical problems (border restrictions, lack of containers and labor at ports.)

---

<sup>1</sup> This forecast only pertains to the 21 counties that participate in the WAPA apple forecast. Apple production also exists in Bulgaria, Cyprus, Estonia, Finland, Ireland, and Luxemburg. According to Eurostat their combined production amounted to roughly 80,000 MT in recent years. Malta does not have commercial apple production.

- Ukraine, Moldova, and Serbia are emerging as new competitors on the EU market as they try to get less dependent on exports to Russia.
- COVID-19 impact: Demand for apples initially increased especially in March/April. However, in the long run, consumers may opt for cheaper offers (smaller sizes, promotions etc.) due to economic pressure. This could negatively affect demand for so-called “club-varieties” in the premium market segment.

FAS/Berlin analysis: U.S. apple exporters should see stable or even decreased competition from the EU on the world market, as production is forecast at the third lowest level of the past ten years.

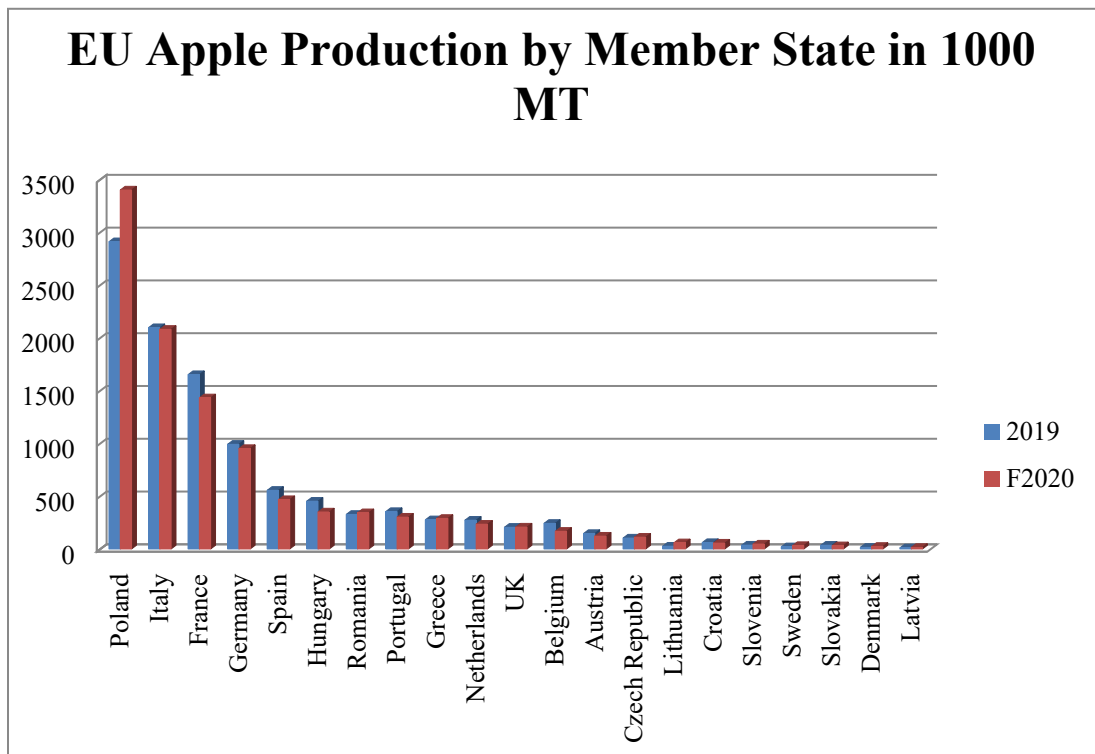
**Table 1: EU Apple Production by Country (1000 MT)**

Country	2015	2016	2017	2018	2019	2020 f	% 2020 versus 2019	% 2020/ Average 17-19
Poland	3979	4035	2870	4810	2910	3400	17%	-4%
Italy	2280	2272	1704	2264	2096	2080	-1%	3%
France	1674	1515	1424	1477	1651	1431	-13%	-6%
Germany	973	1033	597	1093	991	951	-4%	6%
Spain	482	495	480	476	555	467	-16%	-7%
Hungary	522	498	530	782	452	350	-23%	-40%
Romania	336	327	230	425	327	343	5%	5%
Portugal	329	263	314	267	354	301	-15%	-3%
Greece	242	259	231	301	276	289	5%	7%
Netherlands	336	317	228	267	272	234	-14%	-8%
UK	243	239	207	219	205	207	1%	-2%
Belgium	285	234	88	231	242	167	-31%	-11%
Austria	177	40	67	184	146	121	-17%	-9%
Czech Republic	156	139	102	145	103	111	8%	-5%
Lithuania	46	50	48	62	26	58	123%	28%

Croatia	101	35	66	86	60	55	-8%	-22%
Slovenia	71	12	6	72	36	46	28%	21%
Sweden	21	20	18	32	20	32	60%	37%
Slovakia	40	17	15	44	35	30	-14%	-4%
Denmark	24	24	19	24	15	24	60%	24%
Latvia	8	10	8	14	10	14	40%	31%
Total	12326	11834	9251	13275	10783	10711	-1%	-4%

Source: WAPA

f = Forecast



Source: FAS/Berlin based on WAPA data

F= Forecast

**Table 2: EU Apple Production by Variety (1000 MT)**

Variety	2015	2016	2017	2018	2019	2020 f	% 2020 versus 2019	% 2020/ Average 17-19
Golden Delicious	2534	2406	1911	2403	2261	1964	-13%	-10%
Gala	1382	1314	1271	1467	1439	1490	4%	7%
Red Delicious	643	632	558	737	678	660	-3%	0%
Idared	1129	965	629	1177	592	598	1%	-25%
Shampion	513	522	416	569	413	444	8%	-5%
Red Jonaprince	104	156	114	371	407	437	7%	47%
Granny Smith	405	384	363	393	372	369	-1%	-2%
Elstar	399	387	265	357	363	312	-14%	-5%
Jonagold	633	567	298	577	391	310	-21%	-27%
Fuji/Kiku	338	288	290	332	316	294	-7%	-6%
Cripps Pink	244	261	260	275	289	277	-4%	1%
Braeburn	327	320	220	312	286	257	-10%	-6%
Jonagored	519	539	335	563	246	231	-6%	-39%
Ligol	303	330	250	350	150	210	40%	-16%
Gloster	183	197	166	190	145	154	6%	-8%
Pinova	119	104	85	155	140	154	10%	22%
Reinette Grise du	134	108	83	142	129	129	0%	9%
Jonathan	143	123	108	164	96	90	-6%	-27%
Bramley	84	85	75	72	54	58	7%	-13%
Morgenduft/Imperatore	46	49	54	58	48	52	8%	-3%

Boskoop	92	71	34	66	55	47	-15%	-9%
Annurca	35	35	35	40	45	45	0%	13%
Cox Orange	34	29	20	23	17	16	-6%	-20%
Other new varieties	165	213	209	344	359	405	13%	33%
Other	1818	1749	1202	2139	1492	1708	14%	6%
<b>Total:</b>	<b>12326</b>	<b>11834</b>	<b>9251</b>	<b>13276</b>	<b>10783</b>	<b>10711</b>	<b>-1%</b>	<b>-4%</b>

f= forecast

Note: Category “Other new varieties” includes but is not limited to: Ariane, Belgica, Cameo, Diwa, Greenstar, Honey Crunch, Jazz, Junami, Kanzi, Mariac, Rubens, Tentation, Wellant

Source: WAPA

**Table 3: Commercial Apple Stocks in Select MS and Switzerland on July 1 (1000 MT)**

Country	2019	2020	2020:2019
Italy	194	116	-40%
France	69	88	26%
Spain (Catalonia)	33	43	32%
Belgium	26	24	-8%
Germany	59	19	-67%
The Netherlands	19	17	-9%
Austria (Steiermark)	34	11	-66%
Poland	104	11	-89%
Switzerland	13	6	-50%
United Kingdom	5	4	-3%
Czech Republic	6	0	-100%
Denmark	1	0	-100%
Total	561	340	-39%

Source: WAPA

### Forecast for Pears

Production of fresh pears is forecast at 2.2 million MT<sup>2</sup>, versus 1.96 million MT in 2019. This is an increase of 12 percent compared to 2019 but 3 percent below the average of the preceding 10 years.

Philippe Binard from WAPA presented the pear forecast and Helwig Schwartau from AMI, Germany reported on the outlook for MY 2020/21. Their major points were:

On EU production:

---

<sup>2</sup> This forecast only pertains to the 19 countries that participate in WAPA for pears. Pear production also exists in Austria, Bulgaria, Cyprus, Finland, and Luxemburg. According to Eurostat their combined production amounted to roughly 40,000 MT in recent years. Estonia, Ireland, Lithuania, and Malta do not have commercial pear production.



- EU pear area continued its decline. However, the Netherlands and Belgium are expanding their pear area (mainly of the *Conference* variety.)
- In 2020, production is declining in Portugal, Hungary (due to frosts), and Spain.
- Production recovered in Belgium while spring frosts prevented a full recovery of production in Italy.
- In the variety mix *Conference* defended its position as the primary variety with 42 percent of total pear production. *Abate Fetel* partially recovered and regained the number two position, with *Bartlett* remaining number 3.

On market conditions:

- Production and demand should be well balanced.
- Current price level matches previous year's level as EU pear stocks are depleted.
- The majority of pear trade occurs within the EU internal market. For exports outside the EU, Spain and Portugal are the largest actors. About half of Spain's extra-EU pear exports are destined to Northern Africa; the other half goes to South America and the Middle East. Portugal's extra-EU pear exports are almost entirely destined for Brazil.
- Exports to Brazil (mainly from Portugal) may decrease due to COVID-related logistical problems at Brazilian ports.
- Italy, the Netherlands, and Belgium export mostly to other EU member states.
- Germany is the largest market for pears in the EU. Consumption is stable but unlikely to grow.
- The outcome of the EU/UK negotiations on their future trade relationship could have a strong impact on the EU pear market, as the UK absorbs a large part of the EU's internal pear exports.

**Table 4: EU pear production by country (1,000 MT)**

Country	2015	2016	2017	2018	2019	2020 f	% 2020 versus 2019	% 2020/ Average 17-19
Italy	764	681	738	730	363	642	77%	5%
Netherlands	349	374	330	402	373	373	0%	1%
Belgium	369	322	310	369	332	362	9%	7%
Spain	344	311	331	298	313	300	-4%	-4%
Portugal	134	113	186	142	202	159	-21%	-10%
France	155	138	133	134	121	124	2%	-4%
Greece	60	47	59	60	58	66	14%	12%
Poland	80	55	40	70	70	65	-7%	8%
Germany	43	35	23	45	42	43	2%	17%
UK	25	24	23	23	20	18	-10%	-18%
Hungary	33	38	35	38	32	16	-50%	-54%
Romania	13	16	12	21	16	13	-19%	-20%

Czech Rep	10	7	4	7	6	6	0%	6%
Denmark	6	6	5	6	4	6	50%	20%
Croatia	2	1	6	4	3	2	-33%	-54%
Sweden	1	1	1	2	1	2	100%	50%
Slovenia	4	1	0	5	1	1	0%	-50%
Slovakia	1	0	1	1	1	1	0%	0%
Latvia	0	0	0	0	1	1	0%	200%
<b>Total:</b>	2394	2171	2237	2358	1959	2199	12%	1%

f = forecast, Source: WAPA

**Table 5: EU-27 Pear Production by Variety (1000 MT)**

Variety	2015	2016	2017	2018	2019	2020 f	% 2020 versus 2019	% 2020/Average 17-19
Conference	967	908	871	988	892	927	4%	1%
Abate Fetel	333	296	328	318	140	287	105%	10%
Williams BC /Bartlett	283	261	263	272	200	242	21%	-1%
Rocha	134	113	186	142	202	159	-21%	-10%
Coscia-Ercollini	79	67	79	70	63	73	16%	3%
Comice	87	82	59	82	62	68	10%	0%
Guyot	74	59	65	58	58	55	-5%	-9%
Kaiser	45	38	43	45	17	36	112%	3%
Blanquilla	44	40	43	40	37	36	-3%	-10%
Passacrassana	12	11	9	10	7	9	29%	4%
Durondeau	5	3	2	4	3	3	0%	0%
Other	330	292	287	329	278	304	9%	2%
<b>Total:</b>	<b>2394</b>	<b>2171</b>	<b>2237</b>	<b>2358</b>	<b>1959</b>	<b>2199</b>	<b>12%</b>	<b>1%</b>

f= forecast

Source: WAPA

**Attachments:**

No Attachments.