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## EU-28

### Fresh Deciduous Fruit Annual

2017

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#### Report Highlights:

Due to late frost throughout the EU and hot spells in Southern and Eastern EU, commercial apple production in MY 2017/18 is estimated to be 18 percent down compared to the previous season. This is the lowest apple production since 2007. Imports should increase by 42 percent as a result. The forecast for EU commercial pear production is 0.3 percent lower. Overall EU commercial table grapes production is expected to be down by 13 percent. This is mainly because of significantly lower production in Italy affected by heavy rainfalls.

**Commodities:**

Apples, Fresh  
 Pears, Fresh  
 Grapes, Table, Fresh

**Author Defined:****Introduction**

Disclaimer: This report presents the situation and outlook for apples, pears, and table grapes in the EU-28. This report presents the views of the authors and does not reflect the official views of the U.S. Department of Agriculture (USDA). The data are not official USDA data.

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### Abbreviations and definitions used in this report

APHIS	Animal and Plant Health Inspection Service
CAJ	Concentrated Apple Juice
CAP	Common Agricultural Policy
CMO	Common Market Organization
DG	Directorate General
DPA	Diphenylamine
e	Estimate
EU	European Union
EE	Eastern European
GTA	Global Trade Atlas
Ha	Hectare; 1 ha = 2.471 Acres
MT	Metric Ton = 1000 kg
MMT	Million Metric Tons
MRLs	Maximum Residue Levels
MS	EU Member State(s)
MY	Marketing year
Apples:	July/June
Pears:	July/June
Table Grapes:	June/May
NEF	National Framework for Environmental Action
OP	Operational Program
PO	Producer Organization
PSD	Production, supply and demand
R	revised
SFS	School Fruit Scheme
UAE	United Arab Emirates
U.K.	United Kingdom
U.S.	United States
USD	U.S. Dollar
USDA	United States Department of Agriculture
WAPA	World Apple and Pear Association

Trade data cited in this report was derived by using the following HS tariff codes:

Apples:	0808 10
Pears:	Until 12/31/2011: 0808 20 (pears and quinces) as of 01/01/2012: 0808 30 (pears)
Table grapes:	0806 10 10

## Policy

Coordinated by Tania De Belder/USEU/FAS Brussels

Fresh deciduous fruit falls under the EU fruit and vegetables regime and is part of the Common Agriculture Policy (CAP). The following section explains the main elements of the EU fruit and vegetables policy that refer to the fresh deciduous fruit sector. The second part explains the EU measures that were taken in response to the Russian embargo.

### I. EU policy related to Fresh deciduous fruit

#### 1. The New Common Agriculture Policy (CAP) Reform

The single Common Market Organization (CMO) provides a framework for market measures under the CAP, which is outlined in [Regulation \(EU\) No 1308/2013](#) and entered into force on January 1, 2014. The CAP 2020 reform consists of four [basic regulations](#), supplemented by delegated acts, and amends the implementing rules for the fresh and processed fruit and vegetables sectors ([Commission Implementing Regulation \(EU\) No 543/2011](#)).

On June 1, 2017, [Commission Delegated Regulation 2017/891](#) entered into force and amended regulation 543/2011. The new framework seeks to make POs more attractive to non-members, provide greater clarity about what actions are eligible for EU funding, and set a maximum percentage of produce that can be marketed outside the organization at 25 percent to create short supply chains whereby producers sell directly to consumers. It will also simplify and clarify legislation with regard to payments to transnational POs and their associations. POs can make use of the new provisions for the next programming period (2018). In addition, it increases the support for withdrawals for fruit and vegetable Producer Organizations (POs).

These market measures aim to:

##### a) Create a more competitive and market-oriented sector

Producer Organizations (POs) are still the key elements in the EU's CMO for fruit and vegetables. POs are legal entities established by producers to market commodities, including apples, pears and table grapes. EU subsidies are not paid to individual producers but are channeled through POs. In order to qualify for EU subsidies, a PO must submit an operational program financed through an operational fund. The EU's financial contribution is paid directly into the POs operational fund. The calculation of the estimated amount of the operational fund is based on the operational program and the value of the marketed production. As of January 20, 2014, operational programs are approved under the Regulation (EU) No 1308/2013.

Fresh fruit and vegetable imports into the EU are checked for compliance with EU-harmonized marketing standards. These standards apply at all marketing stages and include criteria such as quality, size, labeling, packaging, and presentation. Commission Implementing Regulation (EU) No 543/2011 provides for a general marketing standard for all fresh fruits and vegetables. Specific marketing standards are still in place for ten products, including apples and pears. The specific marketing standards are set out in Part B of Annex I to this Regulation: for apples in Part 1 of that same section on page 95 and for pears in Part 6 on page 129.

b) Diminish crisis-related fluctuations in producers' income

To achieve this objective, EU funding is offered under the operational programs for:

- Product withdrawal
- Green harvesting/non-harvesting;
- Promotion/communication tools;
- Training measures;
- Harvest insurance;
- Assistance to secure bank loans, and support for administrative costs associated with setting up mutual funds.

National authorities must determine, in their national strategy, which of these instruments can be funded in their countries. POs may take out loans on commercial terms to finance crisis prevention and management measures. The repayment of the capital and the interest on those loans may be eligible for financial assistance under the operational programs of POs.

c) Encourage increased consumption of fruit and vegetables in the EU

The European “School Fruit Scheme” (SFS) originated in 2009 as a measure to combat child obesity and includes three elements: free distribution of fruit and vegetables in schools, information campaigns on healthy eating habits, and monitoring and evaluation. As in previous years, the EU funds of \$164 million (€150 million) was allocated in the school year 2016/17 to 25 [Member States](#) that decided to participate in the program - with Sweden, Finland and United Kingdom opting out.

[Regulation EU No 2016/791](#) on the new School Scheme for Milk, Fruit and Vegetables applies as of August 1, 2017.

The sector may also benefit from the European [promotion](#) budget for agricultural products and [quality schemes](#). The Commission reformed its promotion policy with an extension of the product scope and a greater focus on export markets. The current promotion budget of \$76 million (€60 million) will increase annually until it reaches \$255 million (€200 million) in 2020. National co-funding will no longer be needed and EU associations will be able to apply directly for a program.

d) Increase the use of environmentally friendly cultivation and production techniques

At least 10 percent of operational program funding must be spent on environmental actions that go beyond mandatory environmental standards. MS with recognized POs must draw up a National Framework for Environmental Action (NEF) as part of their “national strategy for sustainable operational program.” The NEF must contain a non-exhaustive list of environmental actions and the conditions applicable to them in the Member State concerned.

For information on the CAP after 2014, please see: [http://ec.europa.eu/agriculture/cap-post-2013/index\\_en.htm](http://ec.europa.eu/agriculture/cap-post-2013/index_en.htm)

## **2. Certification of Fruit Shipments**

Plant products need a phytosanitary certificate to be exported to the EU. Phytosanitary certificates issued by a USDA/Animal Plant Health Inspection Service (APHIS) inspector are required to accompany fruit, vegetable, and nut shipments. APHIS issues phytosanitary certificates in accordance with international regulations established by the [International Plant Protection Convention of the Food and Agriculture Organization of the United Nations](#). This standard-setting body coordinates cooperation between nations to control plant and plant product pests and to prevent their spread.

[Council Directive 2000/29/EC](#) contains provisions concerning compulsory plant health checks. This includes documentary, identity, and physical plant health checks to verify compliance with EU import requirements. More information can be accessed on DG Health and Consumer Protection's website [https://ec.europa.eu/food/plant/plant\\_health\\_biosecurity/non\\_eu\\_trade/inspections\\_en](https://ec.europa.eu/food/plant/plant_health_biosecurity/non_eu_trade/inspections_en).

[Commission Regulation 1756/2004](#) provides for plant health checks to be carried out at reduced frequency when justified. The list of products recommended for plant health checks at reduced levels was issued on [October 22, 2015](#). On an annual basis, the Commission monitors imports of fruit and vegetables to determine how to adjust the frequency of testing consignments.

### 3. Maximum Residue Levels for Fruit

Maximum Residue Levels (MRLs) for pesticides, including import tolerances, have been harmonized throughout the EU since September 2008. As a marketing tool, some retail chains in the EU adopt private standards that exceed EU regulations by requiring their suppliers to adhere to stricter company policies that limit the maximum residues to 30, 50, or 70 percent of the respective EU MRL. Please find the link to the [EU MRL database](#), as well as to the International [USDA MRL database](#) developed by USDA for MRLs worldwide.

*Note: Diphenylamine (DPA) is a pesticide used on apples and pears to prevent scalding but is no longer authorized for use in the EU. Subsequently, the MRLs for DPA decreased to 0.1 mg/kg for both apples and pears on March 2, 2014. Since then, the volumes of apples exported to the EU have decreased substantially. Only a few shippers exporting to Europe have designated special DPA-free facilities to stay below the currently allowed levels.*

### 4. Tariffs

EU imports of fresh fruit and vegetables are subject to the Entry Price System (EPS) which has been in place in its current form since the Uruguay Round. It is a complex tariff system that provides a high level of protection to EU producers. In this system fruits and vegetables imported at or above an established entry price are charged an ad valorem duty only. Produce valued below the entry price are charged a tariff equivalent in addition to the ad valorem duty. The tariff equivalent is graduated for products valued between 92 and 100 percent of the entry price. The ad valorem duty and the full tariff equivalent are levied on imports valued at less than 92 percent of the entry price.

Tariff levels for 2017 are published in [Commission Implementing Regulation 2016/1821](#)

*Apples see pages 97 and 687-689*

*Pears see pages 97 and 689-691*

*CAJ see pages 168 and 888*

*Grapes see pages 96 and 686*

The United States tends to sell high quality products at higher prices which typically do not face additional duties.

## **II. Russian ban on agricultural products**

On August 7, 2014, the Russian government implemented a ban for one year on a range of agricultural and food products, including stone fruit, from the United States, the European Union (EU), Canada, Australia, and Norway, in response to U.S. and EU sanctions over Russian actions in Ukraine. The CMO rules (see Regulation 1308/2013 in part I) provide various market management tools to stabilize markets and the Commission is also empowered under the reformed CAP to take "exceptional measures" in case of market disruption. As such, the Commission introduced specific market support measures for the European fruit and vegetables sector since the start of the ban in 2014.

[Commission Delegated Regulation \(EU\) 2017/1165](#) introduced the new aid scheme for fruit and vegetable producers as the ban continues through 2017. It extends the previous scheme but with a lower budget and ceilings for volumes to be withdrawn. The Commission proposes an additional quantity of up to 2000 tons for all Member States to further stabilize the market. The aid for market withdrawals and free distribution entered into force on July 1, 2017, and producers of fruit and vegetables have until July 31, 2018, to apply for their allocation.

More information on the Commission's response to the Russian ban can be found here:

[http://ec.europa.eu/agriculture/russian-import-ban/index\\_en.htm](http://ec.europa.eu/agriculture/russian-import-ban/index_en.htm)

*Note: The total volumes of apples and pears that received intervention support from the European Commission are not reflected in the tables of this report, since the numbers were not available at the time of writing.*

## Apples

Coordinated by Sabine Lieberz/FAS Berlin

**Table 1: EU-28 PSD for Fresh Apples**

Apples, Fresh Market Begin Year	2015/2016		2016/2017		2017/2018	
	Jul 2015		Jul 2016		Jul 2017	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
European Union						
Area Planted	529,650	529,700	523,800	525,660	0	522,435
Area Harvested	514,600	515,560	503,660	512,912	0	511,530
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	0	0	0	0	0	0
Commercial Production	11,581,136	11,305,086	11,048,400	11,335,034	0	9,240,980
Non-Comm. Production	1,077,766	1,147,572	1,246,800	1,256,209	0	780,000
Production	12,658,902	12,452,658	12,295,200	12,591,243	0	10,020,980
Imports	450,000	450,485	430,000	422,592	0	600,000
Total Supply	13,108,902	12,903,143	12,725,200	13,013,835	0	10,620,980
Fresh Dom. Consumption	7,498,662	7,544,162	7,290,200	7,704,074	0	6,318,780
Exports	1,589,800	1,589,791	1,515,000	1,487,809	0	1,000,000
For Processing	3,851,750	3,600,500	3,820,000	3,728,400	0	3,301,200
Withdrawal From Market	168,690	168,690	100,000	93,552	0	1,000
Total Distribution	13,108,902	12,903,143	12,725,200	13,013,835	0	10,620,980
(HA) ,(1000 TREES) ,(MT)						

Note: Lines referring to tree numbers are left blank since this data is only available for a few MS.

Sources:

Trade: GTA

Withdrawal from market MY 2015/16 and MY 2016/17: EU Commission

All other: FAS/EU-28 estimates

### Apples - Commercial Production

Commercial apple production in MY 2017/18 is estimated at 9.2 MMT. This estimate is an 18 percent (or 2.09 MMT) decrease compared to the previous year and is the lowest production since 2007. With the exception of Portugal, all countries show a production below the average of the preceding five years. In Austria, Slovenia, Slovakia, Hungary, Bulgaria, production is rebounding from the extremely low levels of 2016 but still below average.

The EU-28 is one of the leading producers and consumers of apples in the world. Poland (29 percent of total EU production in MY 2017/18), Italy (19 percent), France (15 Percent), Spain (5 percent), and Germany (6 percent) are the top five producing member states and together account for 76 percent of the total EU commercial apple production.

EU-28 apple area is slowly decreasing, mostly due to Polish apple growers pulling up older orchards after a long period of low apple prices specifically following the Russian import ban. In addition, farmers in the Netherlands



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converted some of their orchards to more profitable pear production. However, as the old orchards (especially in Poland) usually were less intensive than newly planted orchards elsewhere, the reduction in area should not reduce overall production capacity in the EU-28.

Throughout Europe warm March temperatures resulted in apples blossoming two weeks earlier than usual. The early blossoms were then hit by severe frosts in the second half of April. The frost not only reduced production but also left marks on the young fruits. These so called “frost rings” do not reduce the inner quality but the outward appearance leaves them only fit for processing. Production was further reduced in Southern and Eastern Europe through hot spells in July. Italy, Poland, and Spain reported local hail damage, while Hungary witnessed more problems with scab disease (*venturia inaequalis* fungus) and codling moth infestation.

**Table 2: EU-28 Commercial Apple Production by Country and Year in MT**

COUNTRY	2015/16	2016/17	2017/18 e	Change 2017:2016 in Percent	Percent of total Production in 2017
Poland	3,046,000	3,504,000	2,700,000	-23%	29%
Italy	2,286,628	2,272,027	1,756,780	-23%	19%
France	1,600,000	1,502,000	1,425,000	-5%	15%
Spain	568,098	592,500	567,600	-4%	6%
Germany	973,462	998,900	555,000	-44%	6%
Hungary	333,890	360,090	385,000	7%	4%
Romania	350,000	360,000	330,000	-8%	4%
Greece	278,438	297,594	282,000	-5%	3%
Portugal	308,990	228,010	277,000	21%	3%
Netherlands	327,600	317,000	234,000	-26%	3%
United Kingdom	183,000	183,000	137,000	-25%	1.5%
Austria	216,092	60,808	110,000	81%	1.2%
Czech Republic	155,361	126,434	98,340	-22%	1.1%
Belgium	276,450	227,000	71,800	-68%	0.8%
Slovenia	83,855	42,739	70,000	64%	0.8%
Croatia	96,182	70,000	65,000	-7%	0.7%
Bulgaria	50,000	40,000	41,500	4%	0.4%
Lithuania	46,000	50,000	40,000	-20%	0.4%
Slovak Republic	46,250	20,722	31,560	52%	0.3%
Denmark	24,000	24,000	19,000	-21%	0.2%
Sweden	21,000	20,000	18,000	-10%	0.2%
Ireland	18,790	21,810	15,000	-31%	0.2%
Finland	6,000	6,400	6,400	0%	0.1%
Latvia	9,000	10,000	5,000	-50%	0.1%
<b>Total</b>	<b>11,305,086</b>	<b>11,335,034</b>	<b>9,240,980</b>	<b>-18%</b>	

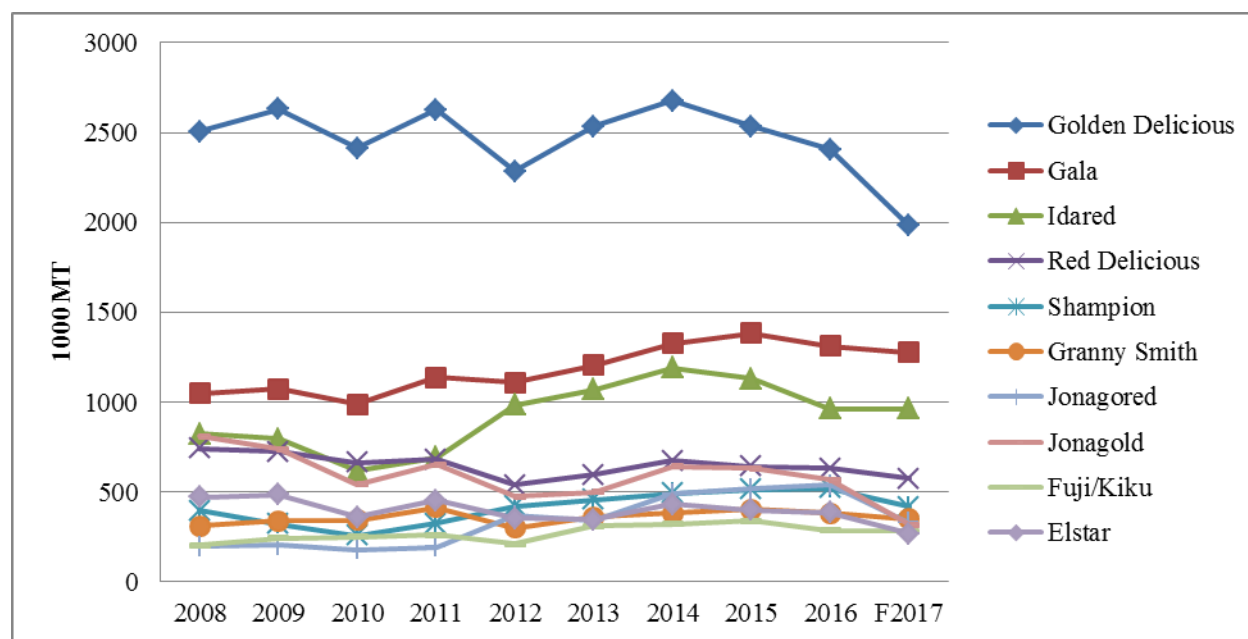
e= estimated

Note: The table is grouped by ranking in MY 2016/17.

Source: FAS/EU-28

Some 25 apple varieties are produced commercially in the EU in volumes exceeding 10,000 MT. Among these, *Golden Delicious*, *Gala types*, and *Idared* are the dominant varieties. However, production patterns vary. While *Golden Delicious* is the variety with the largest production in Italy, France, Spain, and Portugal, *Elstar* is dominant in Germany and the Netherlands; *Idared* is the number one variety in Poland and Hungary. In contrast, *Gala* achieves its position as the second most produced apple in the EU by being grown in numerous MS rather than dominating in a few. New varieties, for example *Pink Lady*, *Kanzi*, *Rubens*, *Tentation*, and *Kiku*, have increased their share of production in recent years. In the Netherlands “new” varieties comprise 10 percent of total production.

**Chart 1: EU-28 Apple Production for Top 10 Varieties in Thousand MT**



F = forecast

Source: FAS/EU-28 based on WAPA data

### Apples - Non-commercial Production

Non-commercial production in MY 2017/18 is estimated at 780,000 MMT, which is a 38 percent decrease compared to MY 2016/17. This decrease is largely a result of lower non-commercial production in Germany, Romania, and Czech Republic, which cannot be compensated by rebounding production in Austria and Slovenia.

However, most EU member states do not report estimates for non-commercial production. As a result, the production figure provided in Table 1 is a rough estimate based on industry rather than official information. Non-commercial production tends to alternate between good and poor crop years. In MY 2016/17, non-commercial production represents about 8 percent of total apple production.

Non-commercial production includes apples grown in home gardens and in untended trees in meadows or field edges. Typically, non-commercial production is used for fresh consumption, apple juice and spirits production, baking (cakes, tarts) or preserved foods (canned, dried, and cooked). The amount of apples diverted to the different segments varies depending on the price for processing apples. Higher processing apple prices generally result in a higher proportion of fruit entering juice production specifically.

In general, non-commercial production is gradually decreasing in the EU-28 as hobby farmers get older. Younger generations have not shown the same interest in small-scale production. Instead, commercial production of higher acid apple varieties for processing is expected to increase to meet demand from the juice concentrate industry.

## **Apples - Stocks**

According to WAPA, EU apple stocks amounted to 471,221 MT on July 1, 2017, compared to 396,662 MT at the same time in 2016, i.e. an increase of 18.8 percent. In some MS the stock number is comprised of apples stored at POs exclusively, while in other member states, stocks include both POs and wholesalers. More important than the actual number is the year-on-year-change of stocks, as end of MY stocks can have a detrimental effect on the prices for the new harvest. In this report, stocks are included in the “fresh domestic consumption” line in the PSD.

## **Apples – Consumption**

Apples are the most popular fruit in all member states except for Spain, where oranges are number one. However, per capita consumption of apples has been decreasing in recent years as consumers eat more soft fruit instead (for example in the U.K.) or reduce fresh fruits consumption altogether (for example in Germany and Hungary). The trend to buy local and organic products is gaining traction in most MS, though still on a limited scale.

## **Processing**

In MY 2017/18, apple processing is expected to decrease compared to MY 2016/17 by 11percent. This will be the lowest level since MY 2011/12. The expected decrease in processing is lower than the decrease in non-commercial production because a higher the average percentage of table apples is expected to end up in processing. This is the result of the previously mentioned “frost rings”, making the affected apple difficult to sell on the table apple market.

Processing uses for apples include apple juice, concentrated apple juice (CAJ), cider, wine/brandy, apple sauce, preserves, canning, apple chips, peeled apples for bakeries, etc. The share of apples used for processing varies significantly by member state, ranging from none in Greece, and the Scandinavian countries to well over 60 percent in Hungary. The processing share also varies from year to year. The EU-28 average share of apples going into processing is forecast to amount to about 31 percent of total supply in MY 2017/18. Major member states with apple processing include Poland, Germany, Hungary, Italy, Romania, France, the U.K., Austria, Spain, and the Czech Republic (in order of descending volume).

## **Apples – Trade**

The majority of trade occurs among the EU-28 countries. Over the past five years, on average about 2.3 million MT of apples were traded between EU member states, while roughly 430,000 to 650,000 MT were imported from outside the EU-28. In recent years imports from outside the EU-28, contributed between three and five percent of the total EU apple supply.

For MY 17/18, it is expected that the internal trade will decrease because of the lower availability of domestic production.

## **EU-28 external trade**

### **Imports**

For MY 2017/18, EU-28 apple imports from outside the bloc are forecast to increase by 42 percent to fill the void left by the very low domestic production. Imports could be even higher should 2018 apple production in the southern hemisphere turn out to be above average.

In MY 2016/17, more than 70 percent of EU-28 apple imports originated from three top suppliers, all of which are located in the southern hemisphere and export mostly during the European off-season.

The main importers of apples were the U.K. and the Netherlands, who together account for 56 percent of the EU-28 imports. However, much of the volume entering the Netherlands is not consumed there but eventually be transshipped to other member states.

Imports from the United States to the EU-28 occur year-round; albeit on a low level. The reduction of the EU MRL for DPA in March 2014 (see policy section) has substantially reduced U.S. apple exports to the EU as only exporters with designated DPA-free facilities are able to ship any longer. However, the United States could indirectly benefit from the lower EU production in MY 2017/18 in markets outside of the EU where the United States and the EU compete, specifically UAE, Saudi Arabia, and India.

**Table 3: EU-28 Imports of Apples in MT**

	MY 2014/15	MY 2015/16	MY 2016/17	Change MY 2016/17 to MY 2015/16	MY 2016/17 % of Total Imports
New Zealand	113,498	109,019	121,268	11%	29%
Chile	113,379	120,863	119,063	-1%	28%
South Africa	96,391	96,520	87,480	-9%	21%
Serbia	827	23,648	27,751	17%	7%
Brazil	31,849	24,029	18,382	-24%	4%
Argentina	14,712	15,328	15,515	1%	4%
Macedonia	10,805	35,888	15,172	-58%	4%
Albania	211	7,190	4,684	-35%	1%
Uruguay	2,245	2,399	4,348	81%	1%
<b>United States</b>	<b>6,918</b>	<b>5,356</b>	<b>2,295</b>	<b>-57%</b>	<b>1%</b>
Australia	95	699	1,361	95%	0.3%
Ukraine	20	63	1,333	2016%	0.3%
China	654	2,071	934	-55%	0.2%
Other	8,743	7,412	3,006	-59%	0.7%
<b>World total</b>	<b>400,347</b>	<b>450,485</b>	<b>422,592</b>	<b>-6%</b>	<b>100%</b>

Source: Global Trade Atlas (GTA)

Note: The table is grouped by ranking in MY 2016/17.

## Exports

In MY 2017/18, EU-28 apple exports are forecast to further decrease by about 490,000 MT (translating into 33 percent) as a result of the low domestic production.

In MY 2016/17 exports were six percent lower than in the previous marketing year as increased shipments to Belarus, Ukraine, Brazil, and India were not able to compensate for severe losses in exports to Algeria as Algeria introduced a restrictive import licensing regime in late 2015. As a result, EU apple exports to Algeria decreased throughout 2016, ceasing altogether in December 2016. In MY 2014/15, prior to the announcement of the import licensing regime, export to Algeria comprised nine percent of all EU apple exports.

In response to the Russian import ban EU exporters looked at increasing exports to other destinations (Eastern Europe, Northern Africa, the Middle East, and Brazil) with varying success. Those countries that were most successful either have the right variety mix (Gala, Granny Smith, Golden Delicious, Red Delicious), and/or were able to build on efforts to open new markets that they started well before the Russian import ban. For example, efforts to open or expand new or nascent markets proved successful in India (by Italy, Belgium, and France). Since the start of the pre-clearance program in October 2014, Italy and France are eligible for export to the United States. Poland has concluded agreements with Vietnam and a number of other Asian countries.

The top destinations for EU-28 apples in MY 2016/17 were Belarus, Egypt, and Kazakhstan. The five largest EU exporters, together accounting for 90 percent of EU apples exports, were Poland (mostly to Belarus, Kazakhstan, Serbia, and Egypt), Italy (to Egypt and Saudi Arabia), France (mainly to U.A.E. and Saudi Arabia), Greece (mainly to Egypt and Jordan), and Lithuania (mostly to Belarus and Kazakhstan).

In some large foreign markets, EU and U.S. suppliers compete. These include:  
 U.A.E. with apples from: France, Italy;  
 Saudi Arabia: Italy, France;  
 India: Italy, Belgium, Poland, the Netherlands, France.

**Table 4: EU-28 Exports of Apples in MT**

	MY 2014/15	MY 2015/16	MY 2016/17	Change MY 2015/16 to MY 2015/14	MY 2016/17 % of Total Exports
Belarus	636,188	563,497	533,678	-5%	36%
Egypt	186,932	252,580	141,653	-44%	10%
Kazakhstan	85,496	75,421	98,876	31%	7%
Saudi Arabia	63,074	80,171	84,363	5%	6%
United Arab Emirates	69,413	66,445	64,446	-3%	4%
Serbia	37,783	57,745	63,564	10%	4%
Brazil	27,105	17,735	58,520	230%	4%
India	18,160	23,836	43,908	84%	3%
Jordan	28,583	40,732	42,407	4%	3%
Ukraine	63,113	25,107	41,732	66%	3%
Norway	38,528	40,092	37,537	-6%	3%
Bosnia & Herzegovina	41,080	21,684	32,504	50%	2%
Switzerland	12,009	12,827	16,627	30%	1%
Libya	50,233	32,728	14,235	-57%	1%
Israel	8,788	19,907	13,001	-35%	1%
Albania	11,932	9,197	12,459	35%	1%
Iraq	6,217	6,111	12,322	102%	1%
Colombia	6,683	11,750	11,559	-2%	1%
Turkey	18,081	8,170	11,537	41%	1%
Algeria	159,799	88,891	3,854	0.26%	-96%
Other	222,785	135,165	149,027	10%	10%
<b>World</b>	<b>1,791,982</b>	<b>1,589,791</b>	<b>1,487,809</b>	<b>-6%</b>	<b>100%</b>

Source: Global Trade Atlas (GTA)

Note: The table is grouped by ranking in MY 2016/17.

## Apples – Withdrawal from Market

Normally, the EU does not offer withdrawal from market/ market intervention programs for apples (see paragraph below). However, in 2014 in reaction to the Russian ban of fruit import from the EU, the European Commission introduced temporary exceptional market support programs for the sector. When Russia prolonged its import ban, the EU extended the temporary measures. They are currently due to expire on June 31, 2018 (see policy section). These measures include non-harvest, green harvest and destruction, and donations to charities (e.g. kindergartens, food banks, hospitals and prisons). However, the use of market withdrawal measures is expected to be minimal in MY 2017/18 due to the lower EU-28 apple production. Only the Netherlands foresee some withdrawals but only on a low level. In MY 2016/17, the measure was used by Poland, Belgium, the Netherlands, and Croatia.

Classic intervention (also called “withdrawal from market”) is no longer available as a separate EU measure since the 2008 reform of the EU common market organization for fruits and vegetables (see policy section). Instead, intervention may be included as an emergency measure in the producer organizations’ operational programs (OP). This means, the system moved from being financed entirely by EU funds to a co-financing system where producer organizations have to bear 50 percent of the costs.

## Apples – Additional Information

For information on tariffs, maximum residue levels, and labeling requirements please see the respective sections at the end of the report.

## Pears, Fresh

Coordinated by Marcel Pinckaers/FAS The Hague

**Table 5: PDS Table Pears, Fresh**

Pears, Fresh Market Begin Year	2015/2016		2016/2017		2017/2018	
	Jul 2015		Jul 2016		Jul 2017	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
European Union						
Area Planted	122,268	121,644	122,248	120,484	0	119,815
Area Harvested	112,858	112,446	112,974	111,065	0	111,168
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	0	0	0	0	0	0
Commercial Production	2,373,130	2,385,360	2,173,952	2,239,358	0	2,232,564
Non-Comm. Production	126,052	128,109	105,100	100,813	0	103,205
Production	2,499,182	2,513,469	2,279,052	2,340,171	0	2,335,769
Imports	221,900	223,696	235,000	206,740	0	207,000
Total Supply	2,721,082	2,737,165	2,514,052	2,546,911	0	2,542,769
Fresh Dom. Consumption	2,028,883	2,048,336	1,941,814	1,941,692	0	1,967,589
Exports	309,600	309,625	300,000	308,160	0	309,000
For Processing	368,770	355,955	266,738	296,059	0	264,180
Withdrawal From Market	13,829	23,249	5,500	1,000	0	2,000
Total Distribution	2,721,082	2,737,165	2,514,052	2,546,911	0	2,542,769

(HA) ,(1000 TREES) ,(MT)

Note: lines referring to tree numbers are left blank since this data is only available for a few MS

Source: USDA Foreign Agricultural Service





## Pears – Production

### Pears – Commercial Production

The EU is the world's second largest producer of pears after China. For MY 2017/18, EU commercial pear production is estimated at 2.2 MMT, down by almost 7 thousand MT (or 0.3 percent) compared to MY 2016/17. Having a closer look, there are differences per pear producing region. Pear production in most Southern European countries is expected to be up while production in Northern European countries is expected to be down. This year's pear production in Poland, Hungary and Germany is expected to be hit hard (down by an estimated 40 percent).

The leading six pear producing Member States together represent almost 90 percent of EU pear production, see below table. Italy is the EU's largest pear producer. Over 32 thousand hectares of pear orchards are cultivated on the Italian peninsula with production concentrated in Emilia-Romagna. Pear production is estimated at 719 thousand MT, an increase of six percent compared to last Marketing Year, but only one percent lower than the past three year average. This year's production is up for almost all varieties including the leading variety *Abate Fetel*. Despite frost after Easter in Veneto, some hail in Emilia-Romagna, followed by a heat wave and drought in June and July in Northern Italy, the quality and taste of the harvested pears is expected to be good this year. The size of the pears is as a result expected to be somewhat smaller.

Although still on the low side, pear production in Spain (345 thousand MT) is estimated to be similar to last year's production. Catalonia continues to be Spain's leading pear producing region. The main varieties are *Conference*, *Limonera* (in Catalonia and Aragon), *Ercolini* (in Murcia and Catalonia) and *Blanquilla* (in Catalonia, Aragon and Murcia). The harvested area has been decreasing in the past ten years as stone fruit orchards slowly replace pear orchards due to improved profitability.

Although in area harvested increased by three percent, pear production in the Netherlands (estimated at 327,000 MT) is expected to down by 12 percent this year compared to last year's peak production. Smaller pears are expected in the Southern part of the Netherlands due to frost after flowering and relative cold and dry weather during the early growing season. The taste of the leading variety *Conference* is expected to be good mainly due to the abundance of sun and some rain in August and September.

Despite a growing area harvested, pear production in Belgium is expected to be down (293,500 MT) for the fourth consecutive year. Low temperatures during and after flowering, combined with a dry growing season will result in less and smaller pears this Marketing Year. The taste and overall quality is expected to be good. Pear production is concentrated in Flanders and growers continue to expand area planted.

Pear production in Portugal rebounded after two years of very low crops. The production of Portugal's variety *Rocha* is estimated at 184 thousand MT, an increase of 66 percent compared to last Marketing Year. The weather conditions during flowering and throughout the growing season were excellent.

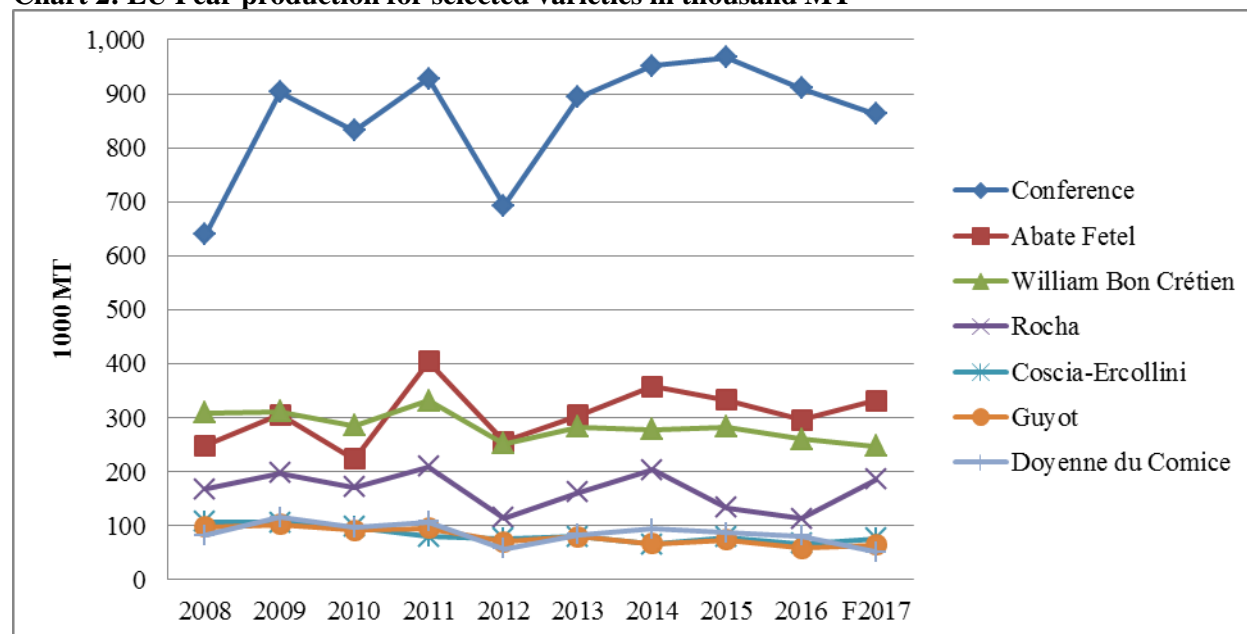
**Table 6: EU-28 Commercial Pear Production by Country and Year**

	MY 2014/15	MY 2015/16	MY 2016/17	MY 2017/18	% Change	% of Total EU Production
Italy	736,000	764,000	681,000	719,000	+6	32.2
Spain	369,280	350,755	345,655	345,000	0	15.5
Netherlands	340,275	345,000	370,000	327,000	-12	14.6
Belgium	362,780	357,500	313,000	293,500	-6	13.1
Portugal	207,909	139,190	111,020	184,000	+66	8.2
France	133,000	141,000	129,000	127,000	-2	5.7
Greece	73,488	72,417	68,529	78,000	+14	3.5
Poland	69,200	59,878	75,500	45,000	-40	2.0
United Kingdom	24,000	25,000	28,000	25,000	-11	1.1
Hungary	17,660	31,249	34,950	23,015	-34	1.0
Germany	44,972	43,071	34,625	19,000	-45	0.9
Romania	21,000	17,000	19,000	18,800	-1	0.8
Other	30,287	39,300	29,079	28,249	-3	1.2
<b>Total Production</b>	<b>2,429,851</b>	<b>2,385,360</b>	<b>2,239,358</b>	<b>2,232,564</b>	<b>0</b>	

Source: USDA Foreign Agricultural Service

The EU area harvested is forecasted to stabilize around 116,000 hectares this year. The area harvested in Italy and Spain is expected to further decline as pear orchards are being replaced by more profitable stone fruit orchards. On the other hand, the area harvested in Belgium and the Netherlands continue to increase further as growing *Conference* pears is more profitable than growing apples.

Almost 40 percent of all pears grown in the EU are *Conference* pears, mainly grown in Belgium, the Netherlands and Spain. Other popular varieties include *Abate Fetel* (grown in Italy), *William Bon Crétien/Bartlett* (grown in Italy, Spain and France) and *Rocha* (grown in Portugal).

**Chart 2: EU Pear production for selected varieties in thousand MT**

F = forecast

Source: WAPA data

## **Pears – Non-Commercial Production**

Non-commercially produced pears include pears grown in house gardens and meadows. If they are harvested, they are predominantly for domestic use, both for fresh consumption or processing. Romania, Austria, Slovenia, Czech Republic, and Slovakia have non-commercial production figures of 50 percent or more of total pear production. For MY 2017/18 non-commercial pear production is estimated at 103 thousand MT, an increase of over two thousand MT; representing almost five percent of total EU pear production.

## **Pears – Consumption**

Depending on the price, the per capita consumption of pears slightly fluctuates from year to year. The average per capita consumption of pears in the EU is estimated at almost four kg per year. The highest per capita consumption can be found in the leading pear producing countries. Italy for instance has the highest per capita consumption with almost ten kg per year, followed by Portugal, the Netherlands, Greece, Spain and Belgium. The lowest per capita consumption markets in the EU, two kg per year or less, are Hungary, Slovakia, Poland and Lithuania. In MY 2017/18 EU consumption of fresh pears is expected to stay at an estimated 2 MMT.

On the MS level, the most popular pear varieties are those that are regionally grown. The number of varieties offered at retail level is usually between two to four. Industry contacts have indicated that taste, price, texture and appearance are the main reasons for buying pears. Finally the demand for local and organic pears is growing.

## **Processing**

EU growers produce pears for the fresh market. Some pears however are not suitable for the fresh market due to their shape, size or quality. These pears are used for further processing (for instance by the canning, juice and baking industry). Pears not suitable for human consumption are used for animal feed or fermenting. The processing numbers also include pears not suitable for either animal or human consumption. Pear prices also impact the volume used for processing. Last Marketing Year, 296 thousand MT pears were used for processing.

In MY 2017/18 it is expected that the volume of pears used for processing will be around 264 thousand MT. The somewhat lower volumes are the result of the expected higher prices for pears. Italy, Spain and Poland have the highest processing figures and their combined volumes account for half of total EU pear processing number. In Italy, the juice industry is the leading buyer of pears that are not suitable for fresh consumption. In other countries, pears are in addition processed into fruit jelly and used by the canning industry.

## **Pears – Trade**

### **EU 28 external trade**

#### **Imports**

The Netherlands and Italy together account for almost 70 percent of EU pear imports. The majority of the volume entering the port of Rotterdam is shipped to MS like Germany, France and the U.K. while Italy's imports predominantly stay on the Italian market. Other importing MS, albeit at much smaller scale, are the United Kingdom, France and Germany.

Pears are imported into the EU to serve the fresh consumer market. Below table demonstrates that the EU mainly imports pears from Southern Hemisphere countries to complement domestic production. Import from these countries starts in February, directly after harvesting in these countries, peaks in April and ends after July. Popular imported varieties include *Packham*, *Williams Bon Crétien*, *Forelle* and *Abate Fetel*. The amount of pears imported in MY 2016/17 was somewhat down since several former export markets now import directly from Southern Hemisphere countries whereas before these pears were traded via the EU. Also in South Africa there were fewer pears available for export due to drought.

**Table 7: EU Import of Pears in MT**

Country of Origin:	*MY 2014/15	*MY 2015/16	MY 2016/17	Change MY 2016/17 to MY 2015/16	% of Total EU Imports
South Africa	93,396	96,656	87,947	-9	43
Chile	55,326	47,679	56,115	+18	27
Argentina	59,249	64,323	45,862	-29	22
China	7,883	10,909	10,876	0	5
Turkey	722	1,568	1,833	+17	1
Uruguay	1,323	285	1,679	+489	1
Bosnia & Herzegovina	187	303	842	+178	0
Serbia	91	343	676	+97	0
New Zealand	858	537	413	-23	0
Belarus	181	534	101	-81	0
South Korea	118	84	84	0	0
Israel	0	0	66	n.a.	0
Switzerland	148	92	61	-34	0
Peru	94	74	60	-19	0
India	21	0	49	n.a.	0
Antarctica	0	0	26	n.a.	0
United States	535	154	24	-84	0
Other	666	155	26	-83	0
<b>Total</b>	<b>220,798</b>	<b>223,696</b>	<b>206,740</b>	<b>-8</b>	<b>100</b>

Source: Global Trade Atlas, USDA Foreign Agricultural Service

\*revised numbers

China is the EU's fourth largest supplier of pears and the only supplier of the *Ya* variety which is consumed by the Asian population in the EU. U.S. pears compete with pears produced in the EU. Last Marketing Year, imports of *Anjou* pears from the United States (24 MT) were only one percent of imported volumes four years ago (1,823 MT). Besides a price difference, Nordic consumers also seem to prefer *Conference* pears above *Anjou* pears. For MY 2017/18, total EU pear imports are expected to stay at 207 thousand MT mainly due to a stabilized pear production in the EU this year.

## Exports

After two years of dropping exports due to the Russian import ban, EU pear exports stabilized last Marketing Year. In MY 2016/17 Belarus continued to be the largest export market for EU pears, mainly *Conference*. Furthermore EU exports of pears continued to shift from Kazakhstan and Azerbaijan to Bosnia & Herzegovina, Serbia and Ukraine. Pear exports to above countries are expected to stabilize in MY 2017/18.

Pear exports to Brazil continued to be low in MY 2016/17 due to low pear production figures in Portugal. With an expected higher harvest of *Rocha* pears in Portugal this year, exports to Brazil in MY 2017/18 are expected to also increase.

For MY 2017/18, EU pear exports to mature markets Norway and Switzerland are expected to not change for the second consecutive year. This is also expected for EU exports to Morocco that rebounded in MY 2016/17.

Countries in the Middle East have proven to be profitable and stable markets for EU pears. Exports to countries like Saudi Arabia and Jordan are expected to slowly grow further in MY 2017/18.

Exports to Hong Kong dropped while trade with China, albeit at a slower pace, continued to grow in MY 2016/17. Hong Kong seems to be a saturated market but the industry expects exports to China to grow further in MY 2017/18.

Due to the Russian import ban, pear producers not only want to grow existing markets, in addition they are looking for new markets in Asia, the Middle East and the Americas. It is important to note that even when these new markets open, it takes years to develop a sustainable market for varieties that are unknown.

**Table 8: EU Export of Pears in MT**

Country of Destination:	*MY 2014/15	*MY 2015/16	MY 2016/17	Change MY 2016/17 to MY 2015/16	% of Total EU Exports
Belarus	184,321	148,297	149,064	+1	48
Brazil	69,172	42,813	43,321	+1	14
Morocco	20,549	15,272	21,219	+39	7
Norway	18,117	17,264	17,074	-1	6
Bosnia & Herzegovina	6,907	9,365	10,544	+13	3
Kazakhstan	14,489	10,189	8,172	-20	3
Switzerland	4,403	6,019	6,271	+4	2
Saudi Arabia	3,028	5,863	5,145	-12	2
Russia	25,944	1,723	4,748	+176	2
Serbia	2,407	2,145	4,413	+106	1
Israel	4,521	5,263	3,739	-29	1
Hong Kong	5,631	4,475	3,670	-18	1
United Arab Emirates	4,251	4,381	3,639	-17	1
China	2,499	3,130	3,252	+4	1
Melilla	2,915	2,843	2,545	-10	1
Libya	11,769	6,779	2,255	-67	1
Albania	3,095	2,259	1,991	-12	1
Ukraine	2,479	1,544	1,941	+26	1
Jordan	603	2,202	1,739	-21	1
Azerbaijan	4,227	2,234	1,629	-27	1
Canada	1,874	2,014	1,623	-19	1
Other	23,496	13,551	18,330	-35	6
Total	416,697	309,625	308,160	0	100

Source: Global Trade Atlas, USDA Foreign Agricultural Service

\*revised numbers

### Pears - Prices

Despite the fact that the Russian market is still closed, producer prices for pears are expected to be good this year due to an average pear production this year. The pear industry has been successful in opening new markets and will continue to do so.

## Pears – Withdrawal from Market

As described in the Policy Chapter, Commission Delegated Regulation (EU) 2017/1165 introduced the new aid scheme for producers of pears as the ban continues. For MY 2017/18, an estimated 2,000 MT of Belgian *Conference* pears is expected to be purchased. More detailed information on withdrawal from market can be found in the Policy Chapter.

## Pears – Additional Information

For information on tariffs, maximum residue levels, labeling requirements please see the respective sections at the end of this report.

## Table Grapes

Coordinated by Ornella Bettini/FAS Rome

**Table 9: EU-28 PSD for Table Grapes**

Grapes, Fresh Market Begin Year	2015/2016		2016/2017		2017/2018	
	Jun 2015		Jun 2016		Jun 2017	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	94,975	97,566	94,698	96,489	0	96,755
Area Harvested	91,518	93,591	91,126	92,093	0	92,778
Commercial Production	1,747,190	1,743,863	1,686,030	1,659,331	0	1,442,000
Non-Comm. Production	9,034	9,104	8,900	6,822	0	8,000
Production	1,756,224	1,752,967	1,694,930	1,666,153	0	1,450,000
Imports	610,800	614,969	640,000	642,701	0	647,000
Total Supply	2,367,024	2,367,936	2,334,930	2,308,854	0	2,097,000
Fresh Dom. Consumption	2,278,974	2,279,967	2,250,230	2,221,648	0	2,011,100
Exports	87,200	87,119	84,000	86,506	0	85,900
Withdrawal From Market	850	850	700	700	0	0
Total Distribution	2,367,024	2,367,936	2,334,930	2,308,854	0	2,097,000
(HA), (MT)						

Source: FAS EU-28

## Table Grapes – Commercial Production

The European Union is a world leader in table grape production, with Italy, Greece, and Spain accounting for approximately 93 percent of the total. MY 2017/18 (June/May) EU-28 table grape commercial production is forecast to decrease by 13 percent and reach approximately 1.4 MMT mostly due to Italy's volume drop by 25 percent because of heavy rainfall in autumn. Reduced quantities are also expected in France (-20 percent) and Romania (-3 percent), while increases are forecast in Greece (+14 percent) and Bulgaria (+49 percent).

Productions in Spain and Portugal are expected to remain flat. Fruit quality is forecast to be excellent with higher sugar content. MY 2017/18 EU-28 table grape area is expected to remain flat compared to MY 2016/17 that had registered a further decrease after a dramatic fall in the last decade. Reduced profitability due to increasing production costs and strong competition from other suppliers were the main factors behind the drop.

Italy is the leading table grape producer in the EU-28, followed by Greece and Spain. Table grape production is concentrated in Southern Italy, mainly in Puglia and Sicilia, which account for 70 and 25 percent of the domestic production, respectively. *Italia*, *Victoria*, and *Red Globe* are the main varieties, covering approximately 68 percent of the table grape area. In the last few years, Italy has gradually moved to seedless grape cultivation due to an increasing demand from intra and extra EU markets. *Sugraone* and *Crimson* are the most popular seedless varieties, followed by *Thompson* and *Sublime*. However, table grape planted area has been declining over the last four years due to lack of profitable investment opportunities. Early varieties (*Black Magic* and *Vittoria*) are sold from May to the end of July. For medium and late varieties (*Italia*, *Palieri*, *Pizzutello Bianca*, and *Red Globe*)—mainly from Sicilia, Abruzzo, Puglia, Basilicata, and Sardegna—the harvest occurs from August to December.

In Greece, there are approximately 17,000 hectares currently cultivated with table grapes. The main producing areas include the prefectures of Corinth in Peloponnese; Kavala in Macedonia; and Heraklion on the island of Crete. *Sultana* (*Thompson Seedless*) and *Victoria* are the leading table grape varieties. Moreover, a greater focus is now being placed on diversifying Greece's grape offer to extend the marketing season into October and November.

In Spain, there are approximately 14,000 hectares currently cultivated with table grapes. This year, approximately 6,000 hectares have been planted with new varieties to replace older ones. The main producing area is the Region of Murcia, accounting for 90 percent of total production. Alicante is also becoming an important producing region. Over 50 table grape varieties are commercialized in Spain. *Aledo*, *Ideal*, *Muscatel*, *Dominga*, and *Napoleon* are the main ones. Seedless varieties represent 30 percent of total table grape production and are mainly produced in the Region of Murcia.

**Table 10: EU-28 Commercial Table Grape Production by Country and Year in MT**

COUNTRY	MY 2015/16	MY 2016/17	MY 2017/18e	% change 2017/18 -2016/17	% of total production in 2017
Italy	1,044,607	1,000,000	750,000	-25	52
Greece	311,048	279,731	320,000	14	22
Spain	270,742	271,600	270,000	-0.6	19
France	45,616	49,494	39,600	-20	3
Romania	36,500	34,000	33,000	-3	2
Bulgaria	16,320	10,066	15,000	49	1
Portugal	19,030	14,440	14,400	-0.3	1
<b>Total</b>	<b>1,743,863</b>	<b>1,659,331</b>	<b>1,442,000</b>	<b>-13</b>	<b>100</b>

e= estimated

Source: FAS/EU-28

### Table Grapes – Non Commercial Production

EU-28 table grape non-commercial production includes table grapes grown in home gardens, meadows, or field edges. MY 2017/18 EU-28 table grape non-commercial production is forecast at 8,000 MT, an increase of 17 percent compared to the previous campaign due to higher volumes in Bulgaria (+49 percent) compensating for flat quantities in Romania (5,000 MT).

### Table Grapes – Consumption

Despite the enduring economic crisis, the EU-28 fresh grape consumption has been rather stable in recent years, but is forecast to decrease by 9.5 percent in MY 2017/18 and reach approximately 2 MMT driven by Italy's reduced production. Starting in June and throughout the end of the calendar year, the EU-28 table grape consumption is mostly met by domestic production. In addition, imports from third countries—normally coming in the first half of the calendar year from the Southern hemisphere—represent approximately 25 percent of total consumption.

Italy is the leading table grape consumer in the EU-28, followed by Germany, the United Kingdom, Greece, France, Spain, Romania, Czech Republic, Portugal, Austria, Bulgaria, Slovakia, Croatia, and Slovenia. Despite the fact that Italian seeded grapes are still greatly appreciated, experts claim that EU-28 consumers are increasingly demanding seedless varieties because of their quality and convenience. Thus, many EU-28 table grape farmers are replacing old seeded varieties with new seedless ones (i.e. *Sugraone*, *Crimson*, *Thompson*, *Regal*, *Summer Royal*, *Centennial*, *Sublime*, etc.). Moreover, a greater focus is now being placed on late varieties (i.e. *Crystal* and *Princess*), in order to make the European grapes available after the busy summer fruit season.

## Table Grapes - Trade

### Imports

The EU-28 is a net importer of fresh table grapes. MY 2017/18 EU-28 table grape imports are forecast slightly up compensating a reduced domestic production. During MY 2016/17, the EU-28 imported 642,701 MT of table grapes, 4.5 percent more than the previous campaign due to increased volumes from South Africa (+8 percent), Chile (+5 percent), and India (+13 percent), the leading suppliers, accounting for 33, 17, and 14 percent of total imports. Follow Peru, Egypt, Turkey, Brazil, and Namibia. The largest EU-28 importing countries remain the Netherlands, Germany, and the United Kingdom. The Netherlands serves mainly as a trans-shipping point.

**Table 11: EU-28 Imports of Table Grapes in MT**

COUNTRY	MY 2014/15	MY 2015/16	MY 2016/17	% change 2016/17 - 2015/16	% of total imports in 2016/17
South Africa	203,650	197,669	213,789	8	33
Chile	118,601	103,071	108,083	5	17
India	40,387	82,290	92,646	13	14
Peru	70,935	64,058	61,993	- 3	10
Egypt	51,871	54,997	49,577	- 10	8
Turkey	28,208	24,344	31,380	29	5
Brazil	23,920	29,324	27,798	- 5	4
Namibia	19,454	18,070	18,567	3	3
Moldova	13,094	11,730	12,313	5	2
Macedonia	3,923	6,394	10,632	66	2
Morocco	7,551	8,093	6,923	- 14	1
<b>United States</b>	<b>9,073</b>	<b>6,401</b>	<b>4,374</b>	<b>- 32</b>	<b>1</b>
Mexico	2,001	1,797	1,470	- 18	0
Argentina	9,117	3,293	681	- 79	0
Lebanon	693	397	673	69	0
Israel	1,081	1,649	662	- 60	0
Bosnia & Herzegovina	169	730	543	- 26	0
Guatemala	-	35	123	248	0
Montenegro	53	127	94	- 26	0
Tunisia	83	36	72	102	0
Other	484	464	305	- 34	0
<b>World</b>	<b>604,348</b>	<b>614,969</b>	<b>642,701</b>	<b>4.5</b>	<b>100</b>

Source: Global Trade Atlas (GTA)



## Exports

MY 2017/18 EU-28 table grape exports are forecast to continue the downward trend as a result of the decreased production. During MY 2016/17, the EU-28 exported 86,506 MT of table grapes, one percent lower than the previous campaign, mainly to Switzerland and Norway, accounting for 34 and 16 percent of total exports, respectively. Moreover, new strategic markets are developing in North Africa, Middle East, and China. Seedless varieties (i.e. *Sugar Crisp*, *Sweet Sunshine*, *Sweet Celebration*, *Sweet Sapphire*, *Jack's Salute*, *Cotton Candy*) are mainly sent to the United Kingdom, Scandinavian countries, and the United Arab Emirates.

**Table 12: EU-28 Exports of Table Grapes in MT**

COUNTRY	MY 2014/15	MY 2015/16	MY 2016/17	% change 2016/17 - 2015/16	% of total exports in 2016/17
Switzerland	26,729	29,143	29,737	2	34
Norway	13,810	14,222	13,518	-5	16
Belarus	9,387	7,419	5,556	-25	6
United Arab Emirates	4,440	6,474	5,405	-16	6
Russia	10,595	2,783	4,296	54	5
Saudi Arabia	2,136	4,192	3,444	-18	4
South Africa	2,382	2,539	2,715	7	3
Bosnia & Herzegovina	3,320	2,056	2,416	17	3
Albania	3,088	2,154	2,390	11	3
Ukraine	3,396	1,929	1,918	-1	2
Brazil	1,598	1,213	1,022	-16	1
Jordan	203	616	1,014	65	1
Sri Lanka	281	674	946	40	1
<b>United States</b>	<b>826</b>	<b>863</b>	<b>791</b>	<b>-8</b>	<b>1</b>
Iceland	943	795	743	-6	1
Kosovo	897	109	584	435	1
Qatar	321	336	494	47	1
Senegal	124	360	490	36	1
Mauritius	317	453	483	7	1
Serbia	1,057	468	472	1	1
Other	15,523	8,321	8,072	-3	8
<b>World</b>	<b>101,373</b>	<b>87,119</b>	<b>86,506</b>	<b>-1</b>	<b>100</b>

Source: GTA

## Table Grapes – Additional Information

For information on tariffs, maximum residue levels, and labeling requirements, please see the respective sections in the report.

## Trade Fairs

Coordinated by Roswitha Krautgartner/FAS Vienna

In the EU, trade fairs play a key role in presenting new products to the trade or in finding additional buyers and importers. The major international trade fair for the fruit and vegetable trade is held each February in Berlin, Germany:

<b>FRUIT LOGISTICA</b> Berlin, Germany (Interval: yearly) Target Market: Europe, Middle East, India Good venue for exhibiting fresh and dried fruit, nuts, and related products <a href="http://www.fruitlogistica.de">http://www.fruitlogistica.de</a>	Next Fair:  February 7 – 9, 2018	U.S. Pavilion Organizer: B*FOR International Tel: +1 (540) 373-9935 E-mail: <a href="mailto:Info@b-for.com">Info@b-for.com</a>
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For organic products there is a special trade fair held annually in Nuremberg, Germany

<b>BioFach</b> Nuremberg, Germany (Interval: yearly) Target Market: Germany/Europe The leading European trade show for organic food and non-food products <a href="http://www.biofach.de">http://www.biofach.de</a>	Next Fair:  February 14 – 17, 2018	U.S. Pavilion Organizer: NuernbergMesse North America, Inc. Tel: +1 (770) 618-5837 E-mail: <a href="mailto:Jessica@NMNA.us">Jessica@NMNA.us</a>
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## Related Reports

Coordinated by Roswitha Krautgartner/FAS Vienna

American Food Ingredients are Cool in Berlin Export Accomplishments - Marketing, Trade Events and Shows Market Promotion/Competition CSSF Activity Evaluation CSSF Activity Report SP1 - Expand International Marketing Opportunities Dried Fruit Tree Nuts Berlin Germany 9/22/2017  FAS Berlin successfully hosted an ice cream-making contest with flavors featuring U.S. ingredients. The “Americanice” ice cream competition brought participating ice cream vendors to the German American Folk Festival where they presented and sold unique flavors featuring high quality American products. The public enjoyed new flavors while the vendors improved awareness of the U.S. high quality products available on the market and connected with those products’ distributors. The colorful event a... <a href="#">American Food Ingredients are Cool in Berlin Berlin Germany 9-19-2017</a>
Stone Fruit Madrid EU-28 8/28/2017  EU-28 production of peaches and nectarines in MY 2017/18 is estimated at 4 million MT, 6 percent higher compared to the previous harvest due to favorable weather conditions. Total cherry production in MY 2017/18 is projected at 576,346 MT, a 21 percent decrease compared with last season, following the downward trend of the last two years, where the growth in Italy and Spain could not compensate the strong decline in Poland and Germany. Due to the Russian ban, the value of EU-28 stone fruit ex... <a href="#">Stone Fruit Annual Madrid EU-28 8-22-2017</a>
2017 Stone Fruit Annual Stone Fruit Agricultural Situation Policy and Program Announcements Warsaw Poland 8/17/2017  Polish stone fruit yields will decline from 2016 due to late-spring frost damage. Poland’s sweet and sour cherry production in 2017 is forecast to decrease by 64 percent from last year’s levels. Total production of cherries (sour and sweet) is forecast at 90,000 metric tons (MT), consisting of 70,000 MT of sour and 20,000 MT of sweet cherries. Cherry acreage decreased by 2.3 percent from 2016, totaling roughly 38,000 hectares. Polish traders are looking to source sour cherries and peaches fro... <a href="#">2017 Stone Fruit Annual Warsaw Poland 8-14-2017</a>

Stone Fruit Report 2017|Stone Fruit Fresh Fruit|Berlin|Germany|8/14/2017

Germany is the third-largest importer of cherries in the world after Russia and China. From 2014 to 2016, between 54 and 68 percent of the cherries consumed in Germany were imported, with the majority of imports originating in other EU-28 member states. The largest non-EU cherry suppliers are Turkey for sweet cherries and Serbia for tart cherries. Total German cherry production for CY 2017 is estimated at 26,000 MT. This represents a decrease of 43 percent compared to CY 2016 and 47 percent...

[Stone Fruit Report 2017 Berlin Germany 8-9-2017](#)

Exporter Guide|Beverages Dried Fruit Exporter Guide Retail Foods Snack Foods Special Certification - Organic/Kosher/Halal Wine|The Hague|Finland|7/31/2017

This exporter guide provides practical tips for U.S. exporters on how to conduct business in Finland. Due to the severe winters and short growing season, Finland relies heavily on imports. While agriculture and food products are a small portion of Finnish imports there are export opportunities for U.S. exporters of alcoholic beverages, dried fruits, snack foods and organics.

[Exporter Guide The Hague Finland 7-26-2017](#)

Trade Suspended for Several High-value Processed Products|Dairy and Products Grain and Feed Livestock and Products Oilseeds and Products Tree Nuts Food Processing Ingredients Retail Foods Food Service - Hotel Restaurant Institutional Trade Policy Incident Report|Algiers|Algeria|7/27/2017

Effective July 4, sources indicate Algeria's import licensing regime extended to include several high-value/processed food products, including almonds, hazelnuts, walnuts, pistachios, macadamia nuts, and pecans. Algeria has not yet announced a timeframe for accepting import license applications or issuing them. Thus, imports of the affected products are suspended until such time. According to Post calculations, import licenses now adversely impact import demand of up to \$155.9 million/year o...

[Trade Suspended for Several High-value Processed Products Algiers Algeria 7-24-2017](#)

France re-instates ban on U.S. cherry imports|Stone Fruit Sanitary/Phytosanitary/Food Safety|Paris|France|5/9/2017

On April 27, 2017 France published a decree banning cherries imports from countries where the use of the chemical dimethoate is legal. As a result, U.S. cherry exports to France will be prohibited in 2017 as they were in 2016. The action will also create competitor opportunities in other EU markets, as the French cherry crop is likely to be smaller and more expensive due to the ban on the use of dimethoate. Fruit importers and traders fear that France may one day implement similar domestic bans...

[France re-instates ban on U.S. cherry imports Paris France 5-3-2017](#)

Product Brief Fresh Fruits|Product Brief Fresh Fruit Fresh Deciduous Fruit Citrus Stone Fruit Strawberries|Berlin|Germany|12/21/2016

Germany is one of the largest markets for fruit in Europe. The relative affluence of its population of 82 million people makes it an attractive outlet for exporters from many countries. This product brief highlights certain aspects of the German fruit market and provides marketing, trade, and regulatory information for U.S. exporters.

[Product Brief Fresh Fruits Berlin Germany 12-16-2016](#)

Italian Kiwifruit Overview 2016|Kiwifruit|Rome|Italy|12/16/2016

Italy remains the second largest kiwifruit producer in the world after China. According to the latest figures from the Italian Fresh Produce Service Centre (CSO), Italy's marketing year (MY) 2016/17 kiwifruit production is forecast at 450,583 Metric Tons (MT), 19 percent lower than the previous abundant campaign (554,796 MT), but 1 percent more than the average production between 2012 and 2014.

[Italian Kiwifruit Overview 2016 Rome Italy 12-6-2016](#)

Poland – Dried Fruit and Nut Sector Dried Fruit Tree Nuts Product Brief Warsaw Poland 11/23/2016
<p>Nuts demonstrated the highest levels of growth in sales at 6 percent value out of all sweet and savory snack foods in the Polish market over the period 2014-2015. Polish consumers are increasingly aware of the healthy benefits provided by dried fruit and nuts and value their convenience as a healthy form of food "on the go." Dried fruit and nuts are also widely used as traditional baking ingredients. U.S. nut commodities hold the largest individual market share for nuts in Poland, nearly one ...</p> <p><a href="#">Poland – Dried Fruit and Nut Sector Warsaw Poland 11-18-2016</a></p>
Deciduous Fruit Annual Report Fresh Deciduous Fruit Bucharest Romania 11/10/2016
<p>Deciduous fruit production is foreseen to recover in 2016, despite episodes of high temperature variations. Demand for fresh products will remain solid, encouraged by local regulations imposed on retailers. Imports are expected to fill in the gap between local production and consumer demand.</p> <p><a href="#">Deciduous Fruit Annual Report Bucharest Romania 11-4-2016</a></p>
Fresh Deciduous Fruit Annual Fresh Deciduous Fruit Sofia Bulgaria 11/8/2016
<p>In MY2015/16 Bulgarian apple, pear and table grape production hit another record with an annual growth of the apple crop of 7%, pears 37%, and table grapes 130%. Prospects for MY2016/17 for the three major products are relatively good, however, average yields may decline due to spring hail storms and frost in some regions, as well as a hot and dry summer. Fresh consumption as well as consumption for processing continued to grow. Consumer demand exceeds local supply and imports increased. ...</p> <p><a href="#">Fresh Deciduous Fruit Annual Sofia Bulgaria 11-2-2016</a></p>
Apples, Fresh, Pears, Fresh, Grapes, Table, Fresh Fresh Deciduous Fruit Annual 2016 Fresh Deciduous Fruit Vienna EU-28 11/3/2016
<p>EU-28 commercial apple production in MY 2016/17 is estimated at 11.3 MMT, a 2 percent decrease compared to the previous year, as weather related dramatic losses in Central-East EU are not compensated by record production in Poland. EU commercial pear production is estimated at almost 2.4 MMT, down by 8 percent while EU-28 table grape production is forecast to slightly decline by 3.5 percent and reach approximately 1.7 MMT. In response to the Russian import ban for European fruit and vegetables...</p> <p><a href="#">Fresh Deciduous Fruit Annual Vienna EU-28 10-27-2016</a></p>
Prognosfruit 2016 Fresh Deciduous Fruit Berlin Germany 10/17/2016
<p>On August 4 - 6, 2016, the World Apple and Pear Association (WAPA) presented the 2016 EU apple and pear crop forecast at the 40th Prognosfruit convention in Hamburg/Germany. WAPA forecasts the 2016 EU fresh apples crop at 12 million metric tons (MT). This is a decrease of 3 percent compared to the large crop in 2015. Production of fresh pears is forecast at 2.1 million MT, versus 2.4 million MT in 2015. This is a decrease of 9 percent. This forecast reflects the situation as of mid-July.</p> <p><a href="#">Prognosfruit 2016 Berlin Germany 10-7-2016</a></p>
Stone Fruit Annual Stone Fruit Sofia Bulgaria 9/16/2016
<p>Following very good 2015 year for the stone fruit sector with higher harvested areas, yields and supply, in 2016 the weather has been more challenging to date. There were reoccurring spring rains and cold temperatures, followed by hail storms, and hot and dry summer. Thus, the average yields and production are likely to decrease more substantially for cherries and less for peaches. Investment and improvement at the production level have continued and planted areas keep growing, especially in...</p> <p><a href="#">Stone Fruit Annual Sofia Bulgaria 9-8-2016</a></p>
Select 2016 Stone Fruit Madrid EU-28 8/24/2016
<p>EU-28 production of peaches and nectarines in MY 2016/17 is estimated at almost 3.7 million MT, 6 percent lower compared to the previous harvest due to unfavorable weather conditions with considerable decreases in the main European producers, Spain and Italy, while Greek production shows an increase. Total cherry production in MY 2016/17 is projected at 623,664 MT, or almost 11 percent decrease compared with last season, where the growth in Poland and Spain could not compensate for the decline ...</p> <p><a href="#">Stone Fruit Annual Madrid EU-28 8-19-2016</a></p>

## Stone Fruit Annual 2016 |Stone Fruit|Rome|Italy|8/22/2016

Italy is the largest peach and nectarine producer in the EU-28. Italy's MY (Marketing Year) 2016/17 peach and nectarine production is forecast to be lower than the previous campaign, because of unfavorable weather. Italy is a major peach and nectarine exporter, mainly within the EU-28. In 2015, Italy exported 258,685 Metric Tons (MT) of peaches and nectarines, 13 percent less than 2014. Lower volumes were exported to Germany (-21 percent), the leading destination, representing 40 percent of ...

[Stone Fruit Annual 2016 Rome Italy 8-16-2016](#)

## Stone Fruit Annual 2016 Poland|Stone Fruit Fresh Fruit|Warsaw|Poland|8/22/2016

In 2016 total sweet and sour cherry production in Poland is expected to increase in comparison with 2015 by 3.1 percent. Total production of cherries (tart and sweet) is forecast at 235,000 Metric Tons (MT). The total number consists of 185,000 MT sour cherries and 50,000 MT sweet cherries. In 2016 cherry orchard acreage diminished by 1.5 percent in comparison with 2015 and amounted to 38,500 hectares.

[Stone Fruit Annual 2016 Poland Warsaw Poland 8-17-2016](#)

## The Italian Kiwifruit Overview |Kiwifruit|Rome|Italy|8/16/2016

Italy is a leading European kiwifruit producer as well as a top global supplier. According to the latest figures from the Italian Institute of Statistics, Italy's MY (Marketing Year) 2015/16 kiwifruit production is estimated at 598,559 Metric Tons (MT), an increase of 18 percent from 2014 thanks to favorable weather.

[The Italian Kiwifruit Overview Rome Italy 8-11-2016](#)

## The Netherlands Horticulture Market|Agricultural Situation Vegetables Fresh Fruit|The Hague|Netherlands|8/9/2016

This report examines the Dutch trade of horticultural products as defined by HS Chapters 06 Live trees and plants, Chapter 07 Vegetable products, and Chapter 08 Edible fruits and nuts. World trade in these products reached \$173 billion in 2015. The Netherlands, a global player, had a 13% share of the world market valued at \$22 billion.

[The Netherlands Horticulture Market The Hague Netherlands 8-3-2016](#)

## Stone Fruit Report 2016|Stone Fruit|Berlin|Germany|7/27/2016

German total cherry production for CY 2016 is estimated at 48,088 MT. This is a decrease of 1 percent compared to CY 2015, and a 9 percent decrease compared to the average of the preceding ten years. Germany is the third-largest importer of cherries in the world, after Russia and China. The majority of imports originate in other EU-28 member states. Largest non-EU suppliers are Turkey for sweet cherries and Serbia for tart cherries.

[Stone Fruit Report 2016 Berlin Germany 7-21-2016](#)

## U.S. Cherries Exports to France hit by French Pesticide Ban|Stone Fruit Sanitary/Phytosanitary/Food Safety|Paris|France|6/8/2016

With the implementation of a ban on cherries imports from countries where the use of the chemical Dimethoate is legal, U.S. cherry exports to France will be prohibited in 2016. It may also create competitor opportunities in other EU markets, as the French cherry crop is likely to be lower and more expensive. The EU has not officially reacted to the French decision, but fruit importers and traders fear that France may soon implement similar domestic bans against other EU-approved pesticides or ...

[U.S. Cherries Exports to France hit by French Pesticide Ban Paris France 5-20-2016](#)

## Spanish soft fruit production increases and consolidates as an alter|Strawberries|Madrid|Spain|2/16/2016

Berry production, especially blackberries, blueberries and raspberries, in recent years has shifted from an alternative production to an important cash crop for Spanish farmers. In the last five years Spanish farmers have embraced berries as the best way to diversify their activity and minimizing the risks related with the strawberry monoculture and the highest competition compared to the rest of soft fruits. At present, there is an increasing demand for soft fruits in Spain, within the EU and ...

[Spanish soft fruit production increases and consolidates as an alter Madrid Spain 2-10-2016](#)

## New EU MRL for Fosetyl Takes Effect|Fresh Fruit Tree Nuts Trade Policy Monitoring|Brussels USEU|EU-28|1/7/2016

On January 1, 2016, the EU maximum residue limit (MRL) for fosetyl-al for several fruits and vegetables reverted back to the detection level set at 2 mg/kg. A yet-to-be published regulation will keep the fosetyl-al MRL for almonds, cashew nuts, hazelnuts, macadamias, pistachios, and walnuts at 75 mg/kg until March 1, 2019. However, imports of berries and other commodities that use fosetyl or other

phosphonate crop inputs will likely be threatened by the return to the default MRL.

[New EU MRL for Fosetyl Takes Effect Brussels USEU EU-28 1-4-2016](#)

Product Brief - Dried Fruits and Nuts|Dried Fruit Snack Foods Tree Nuts Product Brief|Berlin|Germany|1/6/2016

With 81.3 million of the world's richest customers, Germany is the largest market for dried fruits and nuts in Europe and a very important destination for U.S. almonds, walnuts, prunes, and other products. This report provides marketing, trade, and regulatory information for U.S. exporters.

[Product Brief - Dried Fruits and Nuts Berlin Germany 12-9-2015](#)