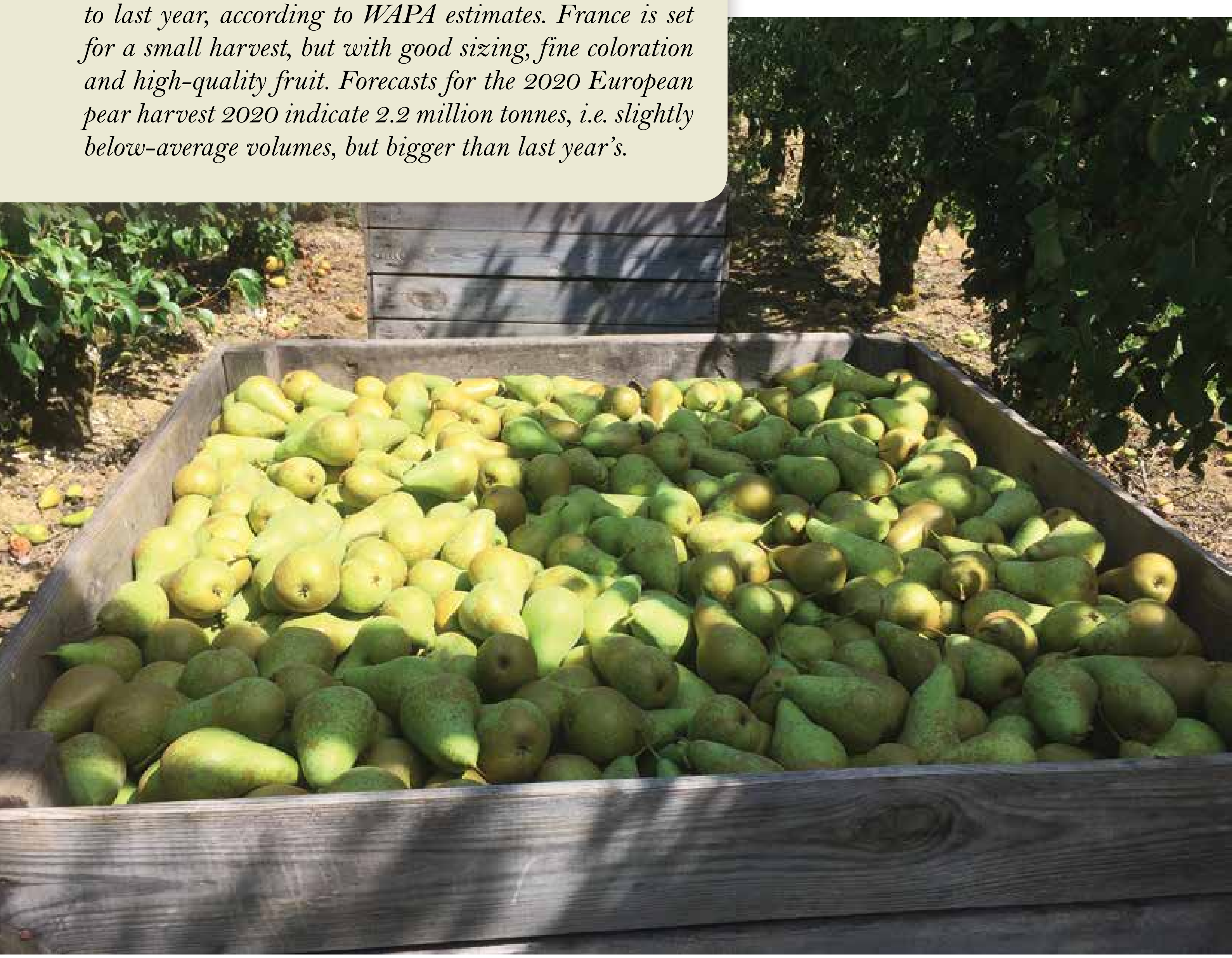
Small apple harvest, and decent pear volumes

The European apple harvest level should be comparable to last year, according to WAPA estimates. France is set for a small harvest, but with good sizing, fine coloration and high-quality fruit. Forecasts for the 2020 European pear harvest 2020 indicate 2.2 million tonnes, i.e. slightly below-average volumes, but bigger than last year's.



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Apples

The estimated European apple harvest is 10.7 million tonnes, a comparable level to last year, but below the usual European potential of 13 million tonnes. Poland is registering a big fall, with its harvest down to 3.4 million tonnes, 55 % of which will be aimed at the industrial sector, with the fruit hit by very heavy frosts. Hungary has a shortfall, while Romania and the Czech Republic are seeing their volumes rise. The Italian harvest will be smaller, at 2.1 million tonnes, and of fine quality. Germany is set for smaller volumes, and Spain for a modest harvest. The club and local varieties are on the increase, though without any bumper harvests. The international varieties are set for a fall of 6 % across Europe, except for Gala.

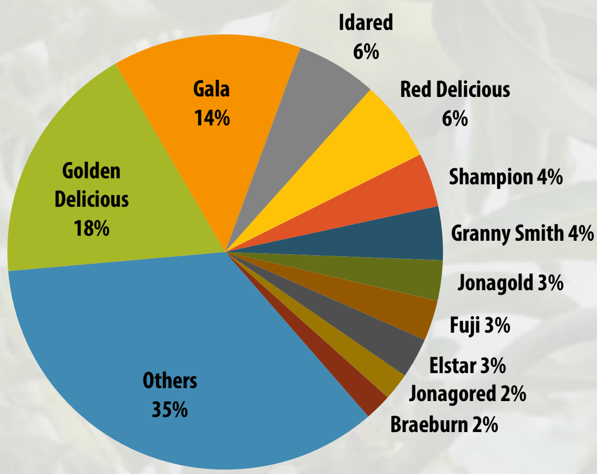
On 27 August, the National Apples and Pears Association (ANPP) revealed the initial harvest and market trends for the French apple. With 1.4 million tonnes forecast, France is expecting a small harvest, though with good sizing, fine coloration and high-quality fruit. This fall is due to a moderate alternate bearing effect and to poor flowering. Golden is down by 19 % from last year, to 350 000 tonnes. The club varieties are set to fall by 5 % by volume to 254 000 tonnes, but orchard surface areas for these varieties have increased.

An export market to monitor

French operators are announcing big flows of Southern Hemisphere apples to the Middle East (United Arab Emirates, Saudi Arabia, Qatar). They reckon that the market is not picking up very quickly at the beginning of this campaign because of suspicions of large stocks from the Southern Hemisphere.

Furthermore, the operators will need to factor in the future Customs conditions with regard to the UK because of Brexit, as of 1st January 2021. The issue of any Customs duty is being addressed, and it remains to be seen whether the other producer countries will be subject to the same Customs requirements. Uncertainties remain over the probable fall in purchasing power throughout Europe and worldwide because of the Covid pandemic. Currency parity is doubtless something to keep a close eye on, since it could also disrupt the market.

Apple - EU - Production breakdown by variety in 2020
(source: WAPA)



Apple – France – Harvest forecast for club varieties

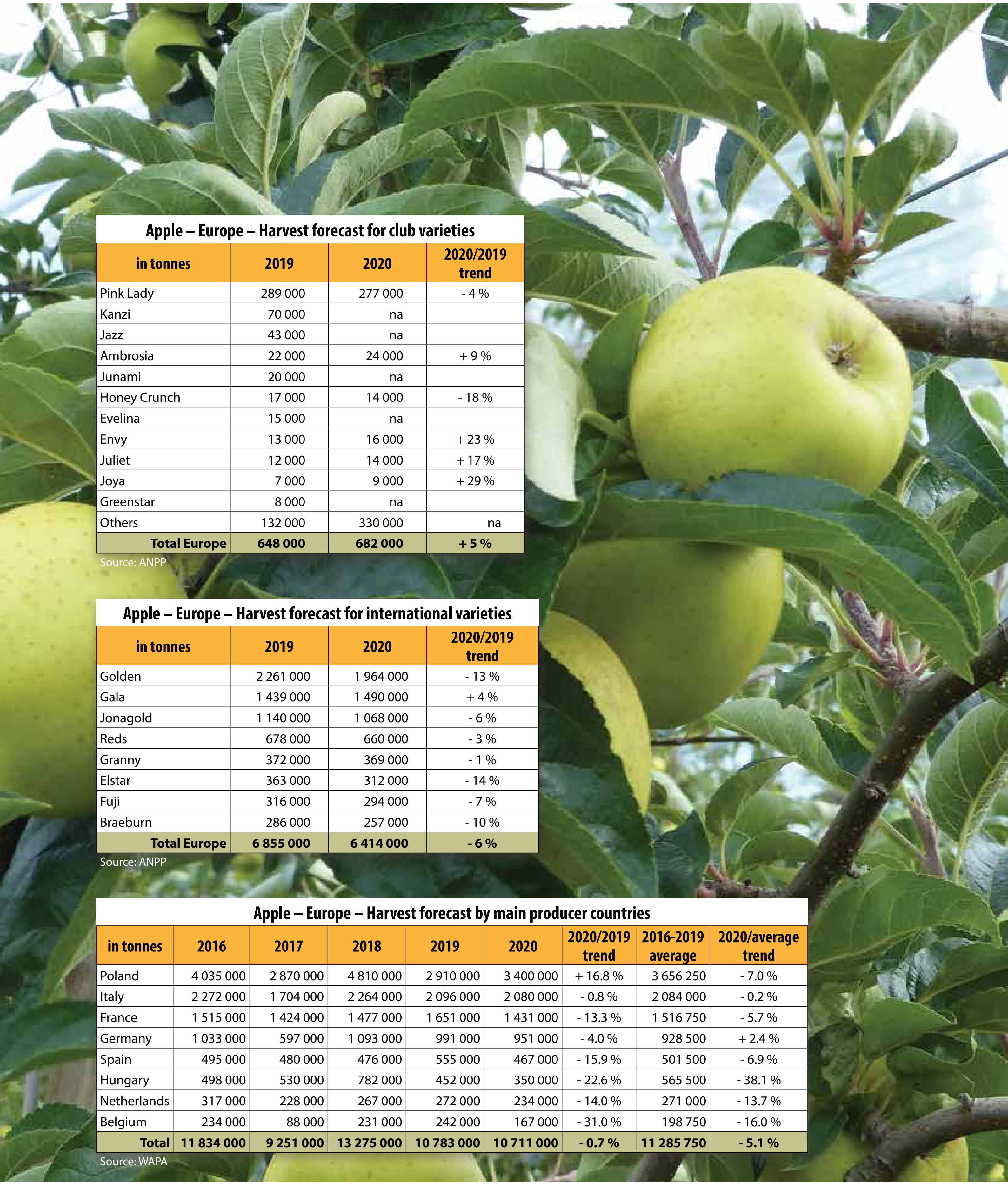
in tonnes	2019	2020	2020/2019 trend
Pink Lady	178 000	158 000	- 11 %
Jazz	26 000	26 000	=
Joya	13 000	15 000	+ 15 %
Juliet	11 000	15 000	+ 36 %
Ariane	12 000	14 000	+ 17 %
Honey crunch	17 000	14 000	- 18 %
Choupette	4 000	5 000	+ 25 %
Tentation	7 000	5 000	- 29 %
Total France	**268 000**	**254 000**	**- 5 %**

Source: ANPP

Apple – France – Harvest forecast for international varieties

in tonnes	2019	2020	2020/2019 trend
Golden	471 000	350 000	- 26 %
Gala	329 000	316 000	- 4 %
Granny	158 000	135 000	- 15 %
Fuji	69 000	52 000	- 25 %
Braeburn	67 000	48 000	- 28 %
Reds	62 000	40 000	- 35 %
Jonagold	30 000	23 000	- 23 %
Elstar	16 000	15 000	- 6 %
Total France	**1 202 000**	**979 000**	**- 19 %**

Source: ANPP



Apple – Europe – Harvest forecast for club varieties

in tonnes	2019	2020	2020/2019 trend
Pink Lady	289 000	277 000	- 4 %
Kanzi	70 000	na	
Jazz	43 000	na	
Ambrosia	22 000	24 000	+ 9 %
Junami	20 000	na	
Honey Crunch	17 000	14 000	- 18 %
Evelina	15 000	na	
Envy	13 000	16 000	+ 23 %
Juliet	12 000	14 000	+ 17 %
Joya	7 000	9 000	+ 29 %
Greenstar	8 000	na	
Others	132 000	330 000	na
Total Europe	**648 000**	**682 000**	**+ 5 %**

Source: ANPP

Apple – Europe – Harvest forecast for international varieties

in tonnes	2019	2020	2020/2019 trend
Golden	2 261 000	1 964 000	- 13 %
Gala	1 439 000	1 490 000	+ 4 %
Jonagold	1 140 000	1 068 000	- 6 %
Reds	678 000	660 000	- 3 %
Granny	372 000	369 000	- 1 %
Elstar	363 000	312 000	- 14 %
Fuji	316 000	294 000	- 7 %
Braeburn	286 000	257 000	- 10 %
Total Europe	**6 855 000**	**6 414 000**	**- 6 %**

Source: ANPP

Apple – Europe – Harvest forecast by main producer countries

in tonnes	2016	2017	2018	2019	2020	2020/2019 trend	2016-2019 average	2020/average trend
Poland	4 035 000	2 870 000	4 810 000	2 910 000	3 400 000	+ 16.8 %	3 656 250	- 7.0 %
Italy	2 272 000	1 704 000	2 264 000	2 096 000	2 080 000	- 0.8 %	2 084 000	- 0.2 %
France	1 515 000	1 424 000	1 477 000	1 651 000	1 431 000	- 13.3 %	1 516 750	- 5.7 %
Germany	1 033 000	597 000	1 093 000	991 000	951 000	- 4.0 %	928 500	+ 2.4 %
Spain	495 000	480 000	476 000	555 000	467 000	- 15.9 %	501 500	- 6.9 %
Hungary	498 000	530 000	782 000	452 000	350 000	- 22.6 %	565 500	- 38.1 %
Netherlands	317 000	228 000	267 000	272 000	234 000	- 14.0 %	271 000	- 13.7 %
Belgium	234 000	88 000	231 000	242 000	167 000	- 31.0 %	198 750	- 16.0 %
Total	**11 834 000**	**9 251 000**	**13 275 000**	**10 783 000**	**10 711 000**	**- 0.7 %**	**11 285 750**	**- 5.1 %**

Source: WAPA

Pears

The prospective European pear harvest has been calculated at 2.2 million tonnes, i.e. slightly below average, but bigger than last year. The leading European producer country, Italy, is announcing a bigger Abate Fetel harvest than in 2019, of 642 000 tonnes as opposed to 363 000 tonnes in 2019, a very long way from the considerable volumes from previous years, which reached 740 000 tonnes. This drastic fall is due to multiple climate and health incidents.

The Dutch harvest will be similar to 2019. Conversely, in Belgium, growers are announcing a fine harvest, bigger than last year's. Spain's expected volumes are down. The summer pears harvest (Williams Coscia and Guyot) will be above average, while for autumn-winter pears, Abate Fetel will see its volumes double from 2019.

This year's estimated French harvest is 124 000 tonnes, volumes practically comparable to the previous campaign. Compared to 2019, we can a see a shortage of Guyot for the summer pears, and a bigger harvest for the autumn-winter pears, because of large volumes of Conference and Comice. While the operators are not noting any difficulties for the coming campaign, there are still a few concerning factors to monitor, such as labour availability, and of course how the Covid pandemic develops, potentially causing unemployment, deflation on certain mass-produced products, lower purchasing power, etc. In addition, since lockdown, more serious questions are being raised over the preference given to purchases of local products, rejecting pre-packed products, etc. Operators say that they have entered a new commercial world since lockdown.

One in two pears consumed in France is imported

Consumers seem to have been rediscovering and enjoying this fruit over the past four or five years. Hence although French pear production is making a comeback, we have seen regained interest in this crop over the past three of four years. But this is not yet making itself felt in production potential, since the industry has had to cope with some climate incidents during flowering in spring.

France is not self-sufficient for the pear, with one in every two fruits imported. Yet the "eat local" movement, or at least "eat French", is encouraging producers to seize the opportunity to develop their orchards. In the face of this frenzy, there is a real fear this year of seeing many boxes of imported pears adopt French colours ■

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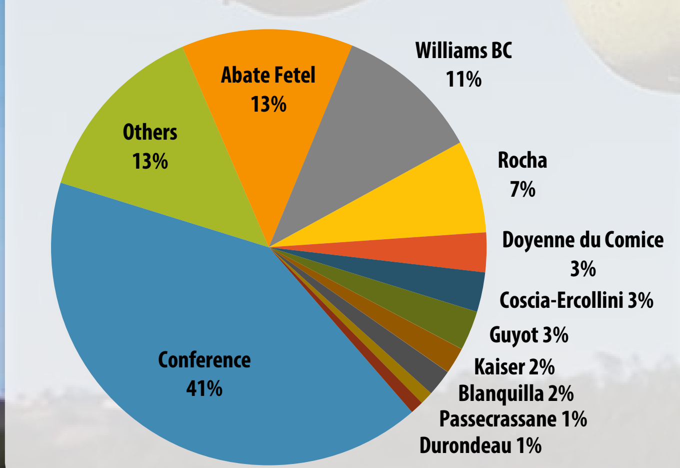
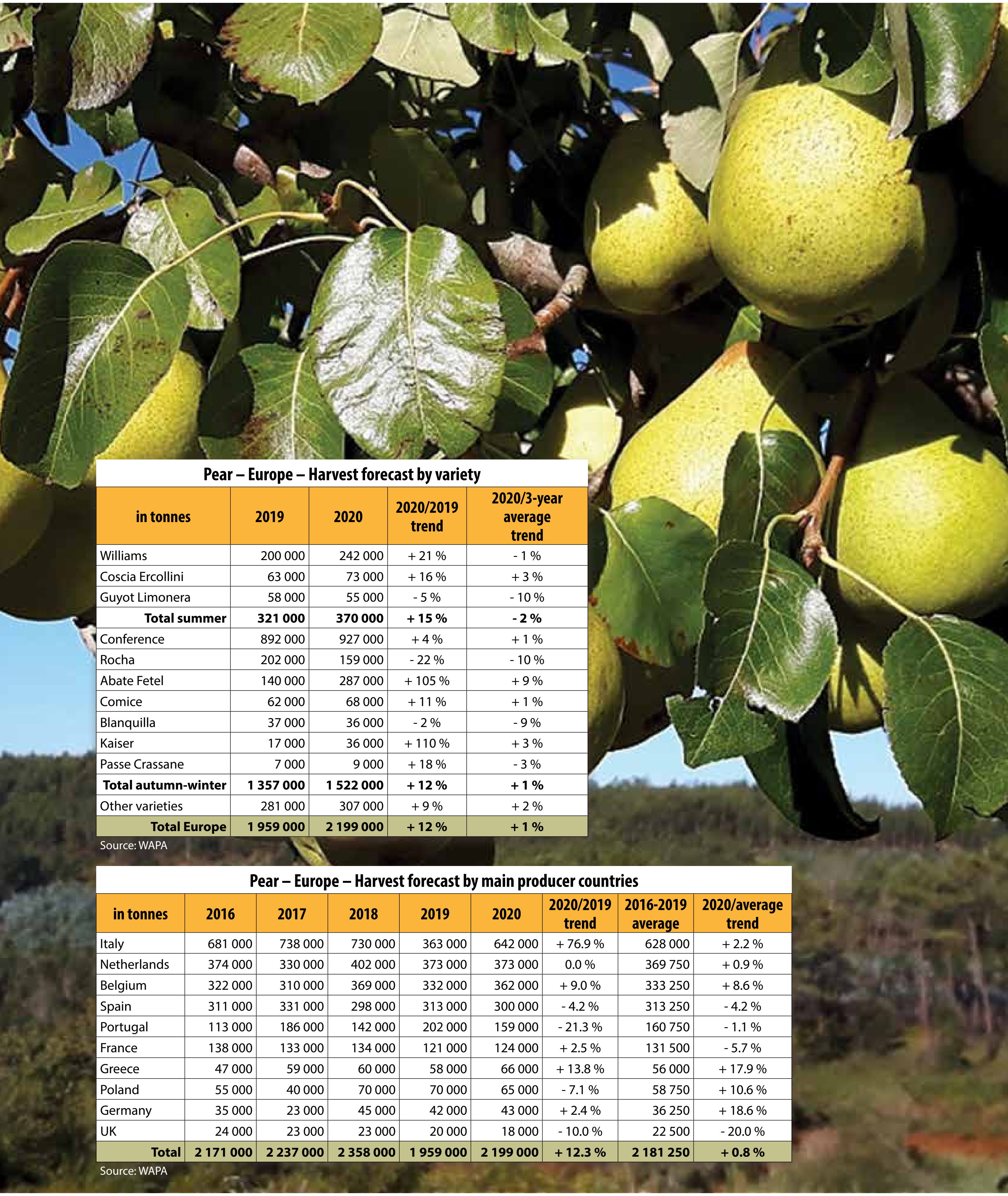
Pear - EU - Production breakdown by variety in 2020
(source: WAPA)



Pear – France – Harvest forecast by variety

in tonnes	2019	2020	2020/2019 trend
Williams	38 000	37 000	- 3 %
Guyot	34 000	31 000	- 9 %
Total summer	**72 000**	**68 000**	**- 6 %**
Conference	24 000	26 000	+ 8 %
Comice	10 000	12 000	+ 20 %
Angelys	3 000	5 000	+ 67 %
Passe Crassane	3 000	3 000	=
Total autumn-winter	**40 000**	**46 000**	**+ 15 %**
Other varieties	9 000	10 000	+ 11 %
Total Europe	**121 000**	**124 000**	**+ 2 %**

Source: ANPP



Pear – Europe – Harvest forecast by variety

in tonnes	2019	2020	2020/2019 trend	2020/3-year average trend
Williams	200 000	242 000	+ 21 %	- 1 %
Coscia Ercollini	63 000	73 000	+ 16 %	+ 3 %
Guyot Limonera	58 000	55 000	- 5 %	- 10 %
Total summer	**321 000**	**370 000**	**+ 15 %**	**- 2 %**
Conference	892 000	927 000	+ 4 %	+ 1 %
Rocha	202 000	159 000	- 22 %	- 10 %
Abate Fetel	140 000	287 000	+ 105 %	+ 9 %
Comice	62 000	68 000	+ 11 %	+ 1 %
Blanquilla	37 000	36 000	- 2 %	- 9 %
Kaiser	17 000	36 000	+ 110 %	+ 3 %
Passe Crassane	7 000	9 000	+ 18 %	- 3 %
Total autumn-winter	**1 357 000**	**1 522 000**	**+ 12 %**	**+ 1 %**
Other varieties	281 000	307 000	+ 9 %	+ 2 %
Total Europe	**1 959 000**	**2 199 000**	**+ 12 %**	**+ 1 %**

Source: WAPA

Pear – Europe – Harvest forecast by main producer countries

in tonnes	2016	2017	2018	2019	2020	2020/2019 trend	2016-2019 average	2020/average trend
Italy	681 000	738 000	730 000	363 000	642 000	+ 76.9 %	628 000	+ 2.2 %
Netherlands	374 000	330 000	402 000	373 000	373 000	0.0 %	369 750	+ 0.9 %
Belgium	322 000	310 000	369 000	332 000	362 000	+ 9.0 %	333 250	+ 8.6 %
Spain	311 000	331 000	298 000	313 000	300 000	- 4.2 %	313 250	- 4.2 %
Portugal	113 000	186 000	142 000	202 000	159 000	- 21.3 %	160 750	- 1.1 %
France	138 000	133 000	134 000	121 000	124 000	+ 2.5 %	131 500	- 5.7 %
Greece	47 000	59 000	60 000	58 000	66 000	+ 13.8 %	56 000	+ 17.9 %
Poland	55 000	40 000	70 000	70 000	65 000	- 7.1 %	58 750	+ 10.6 %
Germany	35 000	23 000	45 000	42 000	43 000	+ 2.4 %	36 250	+ 18.6 %
UK	24 000	23 000	23 000	20 000	18 000	- 10.0 %	22 500	- 20.0 %
Total	**2 171 000**	**2 237 000**	**2 358 000**	**1 959 000**	**2 199 000**	**+ 12.3 %**	**2 181 250**	**+ 0.8 %**

Source: WAPA