Initial info on the 2016 harvest

The European stone fruits harvest forecasts were unveiled at the recent EuroMediterranée trade fair (Medfel), which was held in Perpignan from 26 to 28 April. They indicated that the campaign is finally back to a normal calendar, after the cold and wet spring, although the very mild winter led to very early flowering. The first volumes were harvested in mid-April in southern Spain.

Uncertainty for the peach and nectarine

European harvest forecasts, announced in late May, confirmed the outlined trends, namely production down fairly steeply, to below its 2013 level, with a shortfall similar to that of 2003 and 1998. This fall can be explained by a slight reduction in surface areas, but above all by highly unusual climate conditions during the winter and spring, probably attributable to the end of El Niño in the Pacific. Surface areas are indeed continuing to shrink in many production areas, especially northern Italy, France and Greece, whereas they are stabilising in Spain after the high planting rate over the last decade. Furthermore, losses are expected, in particular for the varieties grown in the Spanish and Italian early zones, as a consequence of the frosts which hit in February and March after the mild winter which induced early flowering. The potential was still highly uncertain in late April for the mid-season and late varieties, the cold and wet spring having staggered tree flowering in some cases over three or even four weeks, as opposed to the usual one or two. This has wiped out the season’s head start from the beginning of the year, and caused great heterogeneity on the trees, with at the same time flowers and small fruits of uncertain future, and so-called differentiated fruits which will reach full maturity. Hence during Medfel the Valencia zone was already set for a 22 % fall in its production, Murcia for a 15 % reduction and Andalusia for a 3 % decrease. Similarly, the earliest production zones in southern and central Italy were set for a fall of at least 6 %.

Overall, the production forecast for peaches, nectarines and clingstone peaches is only 2.73 million tonnes, i.e. another fall of 6 % from 2015. And as announced, the fall is set to be fairly substantial in Italy ( - 11 %), with a marked shortfall in early varieties, it has apparently been mitigated in Spain in Spain ( - 2 %) thanks to the development of young flat peach and nectarine orchards (+ 5 %). France should also have a fairly considerable fall ( - 4 %). Greece, less affected, is set for a small gain (+ 3 %).
Historically low Apricot production

The climate conditions (mild winter followed by a cold and wet spring with frosts) should lead to another fall in the apricot potential in 2016, to below 450 000 t, i.e. a tonnage less than in 2013 or even 2008. Hence production will be well into shortfall in Italy and France (particularly in Gard, Crau and Rhône-Alpes, with smaller losses in Roussillon). Losses in Spain will be somewhat mitigated by the increase in surface areas (modern varieties). Greece meanwhile seems to have been relatively spared, apparently enjoying favourable climate conditions. Nonetheless, as for the peach and nectarine, the production calendars should ultimately be normal, with the spring cold having wiped out the head start from the winter.

On a structural level, we should note that modernisation of cultivation stock is ongoing, especially in most of the Spanish production zones, though also in France, where research is highly active, especially in the early and late-season slots, as well as in southern Italy. Similarly, in Greece, although the Bebeco variety still remains a mainstay of national production, the planting rate of more modern varieties is increasing.
So the fall in potential should help limit the pressure on the European market, whereas the industry is primed to spend its second campaign under the Russian embargo. We should recall that this market previously absorbed 165 000 t of European peaches and nectarines every summer. The closure of this market last year generated from the beginning of the campaign a certain tension and disarray on the market. Operators exporting to this destination had to find alternatives, especially the Spanish producers, who previously shipped 110 000 t of peaches and nectarines, or the Greeks (26 000 t). In terms of trade, efforts will therefore be again focused on seeking new outlets to compensate for the ongoing closure of the Russian market. There are however few alternatives, as these particularly perishable fruits are not really suited to long-haul voyages. Furthermore, the fall in peach and nectarine shipments to outside the Community last year amounted to nearly 80 000 t between May and September, according to European Customs. So the operators have again requested the European Commission to extend the exceptional measures for fruits and vegetable affected by the Russian embargo beyond 30 June.