USDA Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network

Voluntary Report - public distribution

Date: 8/13/2003

GAIN Report Number: GM3024

Germany

Fresh Deciduous Fruit

Prognosfruit 2003 - European Crop Forecast Convention

2003

Approved by:
Karina Ramos
U.S. Embassy

Prepared by:
Sabine M. Lieberz

Report Highlights:
The EU-15 crop for fresh apples in 2003 is forecast at 6.947 million MT. This is a decline of 3 percent compared to the already low crop of 2002. Production of fresh pears is forecast at 2.173 million MT, versus 2.408 million MT in 2002. This is a decrease of 10 percent. This forecast reflects the situation of mid-July. Due to continued lack of rain, the actual crop is expected to be even smaller.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Berlin [GM1]
[GM]

Introduction

Prognosfruit is the annual European crop forecast colloquium for apples and pears. It was first organized in 1975 with 33 experts from 6 countries. Prognosfruit 2003 was held on August 8, 2003 in Cologne, with more than 250 participants from 24 countries, Prognosfruit 2004 will be held in Lublin/Poland on August 6 and 7, 2004.

Abbreviations:

MT = metric ton(s)
CC = candidate countries for EU accession in April of 2004

Forecast for Apples

EU-15

The EU-15 crop for apples in 2003 is forecast at 6.947 million MT. This is a decline of 3 percent compared to the already low crop of 2002, which amounted to 7.139 million MT, and 11 percent below the average of the years 1999 through 2002. This forecast is based on crop travel done in mid-July. Due to a lack of rain, the actual crop is expected to be even below this forecast.

The main reasons for the low crop are

- Late frosts killed some of the blossoms/young fruit
- Little precipitation resulted in reduced fruit size.
- The current heat wave resulted in earlier maturation in northern European countries. When the fruit is harvested earlier, it has less days for fruit growth, and the fruit remains smaller and less heavy.
- The reduction in area is not compensated for by an increase in productivity. From 1997 to 2002, apple area in the EU-15 decreased by 2.5 percent per year.

Despite the smaller crop, fruit quality is expected to be very good. Hail damage occurred in only a few regions. However, because of the heat wave the fruit size is smaller than usual.

The market for apples is expected to be good with high prices, especially at the beginning of the season, because

- Almost all of last season's apples have been sold already, so that there is no competition from this side.
- Competition from other fruits such as peaches, nectarines, and kiwis is not as strong as in other years, as those fruits also had a lower crop.
- Farmers and producer organizations usually tend to put a higher percentage of their crop into storage with small crops than with bigger harvests. There are several reasons for this phenomenon. First of all they hope for increasing prices was the season progresses. Second, they want to ensure that they have produce to sell over the entire season, and third, storage capacity is adapted to hold a certain percentage of an average crop. If the crop is bigger the surplus volumes will have to be marketed directly at the beginning of the season. If the crop is smaller, there is less pressure to sell early, therefore further reducing the availability of fruit at the beginning of the season.

EU exports are expected to decline due to the smaller crop combined with the strong Euro, which makes EU apples less competitive on the world market. For the same reasons, EU imports are expected to increase.

EU-25

Apple production of the EU accession countries is forecast at 3.353 million MT. This an increase of 6 percent compared to the 2002 crop of 3.155 million MT.

The crop for EU-25 amounts to 10.300 MT, which is almost the exact same size as last year's crop.

Forecast for Pears

EU-15 production of pears is forecast at 2.173 million MT, compared to 2.408 million MT in 2002. This is a decrease of 10 percent. Compared to the average of 1999 through 2002, the decrease is only 6 percent. The reasons for a reduced crops are basically the same as with apples. The average annual reduction in area between 1997 and 2002 was 2.5 percent. All countries but Belgium and the Netherlands have reduced their pear acreage over the past years. The reduction affects all pear varieties but "Conference."

The market prospects for pears in the coming season are good. The lower availability of pears and competing fruits is expected to result in higher prices and higher imports.

Section II: Statistical Data

Table 1: EU-15 and new members' apple production, by country (1,000 metric tons)

Country	1995	1996	1997	1998	1999	2000	2001	2002	**2003 Forecast**	%2003 versus 2002	%2003/ Average 99-02
Italy	1,889	2,025	2,042	2,165	2,196	2,206	2,172	2,171	**2,038**	-6	-7
France	1,980	1,900	2,051	1,750	2,230	2,260	1,938	1,966	**1,918**	-2	-9
Germany	573	878	765	977	1,036	1,131	922	763	**867**	14	-10
Spain	780	849	821	680	837	683	806	646	**655**	2	-12
Netherlands	595	490	470	507	575	500	475	370	**385**	4	-20
Portugal	235	257	286	160	295	227	265	300	**300**	0	10
Belgium	508	295	367	407	534	500	337	349	**274**	-21	-36
Greece	315	372	274	356	257	288	194	244	**200**	-18	-19
Austria	128	134	162	128	148	161	156	163	**152**	-6	-3
UK	254	248	152	217	256	195	212	124	**133**	7	-33
Denmark	30	30	33	29	32	31	29	25	**25**	-2	-16
Sweden	18	19	20	18	19	23	23	20			
EU-15*	**7,305**	**7,497**	**7,443**	**7,394**	**8,415**	**8,206**	**7,528**	**7,139**	**6,947**	**-3**	**-11**
Poland**	1,289	1,952	2,098	1,687	1,604	2,000	2,484	2,168	**2,300**	6	11
Hungary	353	552	500	482	443	695	605	527	**488**	-7	-14
Lithuania**	121	81	218	110	110	100	155	120	**180**	50	48
Czech Rep.	96	117	148	107	140	195	141	155	**154**	0	-2
Slovakia**	52	105	106	109	89	108	77	79	**91**	16	3
Slovenia	49	55	54	65	56	59	38	42	**62**	48	27
Latvia**	63	16	88	14	70	30	36	50	**60**	20	29
Estonia**	32	9	20	9	11	10	15	15	**18**	20	41
CC-10	**2,054**	**2,886**	**3,233**	**2,582**	**2,523**	**3,198**	**3,551**	**3,155**	**3,353**	**6**	**8**
EU-25	**9,360**	**10,383**	**10,676**	**9,976**	**10,938**	**11,404**	**11,079**	**10,294**	**10,300**	**0**	**–6**

*) As far as listed above, **) Incl, back gardens,

Source: Prognosfruit 2003, Cologne

Table 2: EU-15 apple production, by variety (1,000 metric tons) *)

Variety	1995	1996	1997	1998	1999	2000	2001	2002	2003 Forecast	%2003 versus 2002	%2003/ Average 99-02
Golden D	2,684	2,634	2,776	2,526	2,826	2,721	2,618	2,485	**2,323**	-7	-13
Gala	208	344	407	440	560	643	676	718	**763**	6	18
Jonagold	735	577	618	714	842	808	613	600	**562**	-6	-21
Red Delicious	790	823	739	774	783	791	674	703	**529**	-25	-28
Granny Smith	394	431	415	369	385	424	346	358	**351**	-2	-7
Elstar	336	332	312	359	428	406	395	337	**338**	0	-14
Braeburn	53	84	104	100	174	207	210	248	**259**	4	23
Morgenduft	179	188	218	187	158	157	137	134	**149**	11	2
Jonagored	57	69	81	116	151	169	150	134	**133**	-1	-12
Cox Orange	184	197	164	182	202	145	165	84	**112**	33	-25
Idared	127	139	123	135	137	148	122	117	**112**	-4	-15
Boskoop	120	134	137	159	196	174	142	91	**103**	13	-32
Fuji	16	22	33	30	56	70	71	80	**93**	16	34
Renette du C.	132	114	88	86	84	82	70	79	**71**	-10	-10
Gloster	96	184	139	136	113	105	82	52	**68**	31	-23
Bramley	121	109	80	98	117	95	99	60	**55**	-8	-41
Pink Lady					15	26	45	55	**53**	-4	50
Annurca	80	78	64	81	80	89	86	79	**40**	-49	-52
Stayman	39	40	35	37	38	34	34	32	**25**	-22	-28
Others	954	998	910	865	1070	912	793	693	**808**	17	-7
EU-15	**7,305**	**7,497**	**7,443**	**7,394**	**8,415**	**8,206**	**7,528**	**7,139**	**6,947**	**-3**	**-11**

*) Variety breakdown does not include Portugal,

Source: Prognosfruit 2003, Cologne

Table 3: EU-15 and new members' pear production, by country (1 000 metric tons) ****

Country	1995	1996	1997	1998	1999	2000	2001	2002	**2003 Forecast**	%2003 versus 2002	%2003/ Average 99-02
Italy	958	1,074	659	1,115	784	876	793	948	**877**	-8	3
Spain	457	650	577	563	682	597	660	603	**596**	-1	-6
France	316	331	234	246	288	259	254	237	**189**	-20	-27
Netherlands	165	135	145	140	135	195	70	179	**160**	-11	11
Belgium	156	137	130	151	165	180	89	173	**142**	-18	-6
Portugal	74	101	174	20	131	142	142	125	**88**	-30	-35
Germany*	40	37	37	55	54	65	47	64	**60**	-6	4
Greece	56	73	41	67	62	53	47	39	**30**	-22	-40
United Kingdom	36	40	25	25	18	34	33	35	**28**	-20	-8
Denmark	5	5	6	5	4	6	6	5	**4**	-30	-31
Sweden	2	2	1	1	2	2	1	1			
EU-15**	**2,264**	**2,585**	**2,029**	**2,388**	**2,325**	**2,409**	**2,141**	**2,408**	**2,173**	**-10**	**-6**
Poland ***	90	83	42	83	67	82	77	90	**80**	-11	1
Slovakia ***	11	11	8	12	9	9	4	4	**5**	12	-25
Czech Republic	2	1	1	2	2	3	2	2	**2**	-17	-12
Slovenia	8	7	3	6	5	5	6				
CC-10	**112**	**102**	**54**	**103**	**83**	**98**	**82**	**96**	**92**	**-4**	**3**
EU-25	**2,375**	**2,688**	**2,083**	**2,491**	**2,408**	**2,507**	**2,223**	**2,504**	**2,266**	**-10**	**-6**

* Due to the estimation method used by the German official statistics for pears the results for 2002 (76,100 t) are excessive and not comparable to previous years. For that reason it has been replaced by a ZMP estimation.
** As far as listed above
*** Incl. back gardens
**** Variety breakdown does not include Portugal

Source: Prognosfruit 2003, Cologne

Table 4: EU-15 pear production, by variety (1,000 metric tons)

Variety	1995	1996	1997	1998	1999	2000	2001	2002	2003 Forecast	%2003 versus 2002	%2003/ Average 99-02
Conference	473	529	470	551	587	573	490	637	635	0	12
Abate Fetel	197	257	180	309	212	242	225	282	259	-8	8
William BC	294	347	189	306	254	286	269	288	248	-14	-10
Blanquilla	180	286	236	226	233	221	240	196	190	-3	-15
Doyenne	175	158	116	177	107	131	68	162	106	-35	-9
Guyot	146	168	140	114	135	105	118	117	100	-15	-16
Coscia	65	89	76	80	116	110	99	103	89	-14	-17
Kaiser	103	89	41	88	51	51	50	59	71	20	35
Red Barlett	16	32	24	27	29	30	28	33	32	-5	7
Passacrassana	76	71	47	62	45	24	23	40	31	-23	-6
Kristalli	16	32	24	27	25	22	17	18	15	-17	-27
Others	458	436	329	350	531	614	514	473	397	-16	-26
EU-15	**2,264**	**2,585**	**2,029**	**2,388**	**2,325**	**2,409**	**2,141**	**2,408**	**2,173**	**-10**	**-6**

Source: Prognosfruit 2003, Cologne