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# **Belgium-Luxembourg**

## **Fresh Deciduous Fruit**

### **Annual**

### **2003**

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#### **Report Highlights:**

**Belgium's 2003 apple production is forecast down 22 percent and pear production down 18 percent, compared to 2002. As a result of the small European fruit harvest, prices are expected to be strong, offering increased opportunities for imports. Belgian apple consumption increased in 2002 to 18.6 kg per person, while pear consumption decreased slightly to 4.5 kg per person.**

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Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
Annual Report  
The Hague [NL1], BE

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## Executive Summary

Frost at flowering led to a reduction of the 2003 production forecast for Belgium/Luxembourg to 280 thousand metric tons of apples and 142.4 thousand metric tons of pears, compared to 2002. Drought in summer has reduced fruit sizes, which could be beneficial for marketing because consumers prefer smaller sizes. Continuing low profitability of apple production provides further incentives for producers to switch to pear production. As European production for both apples and pears is forecast lower, prices are expected to increase and imports are expected to rise.

In 2002, Belgian apple consumption increased 4 percent to 18.6 kg per person. At the same time, pear consumption decreased 4 percent to 4.5 kg per person. Total Belgian fruit consumption increased 2.5 percent to 82 kg per person and expenditures for fruit increased by 8 percent to 138.39 Euros.

## Fresh Apples

PSD Table						
Country	Belgium-Luxembourg					
Commodity	Fresh Apples					(HA)(1000 TREES)(MT)
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		07/2001		07/2002		07/2003
Area Planted	11900	11900	12000	12000	0	10660
Area Harvested	9500	9500	10900	10900	0	9560
Bearing Trees	20000	20000	20000	20000	0	17800
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	20000	20000	20000	20000	0	17800
Commercial Production	340064	340064	348100	356000	0	277000
Non-Comm. Production	3500	3500	3500	4000	0	3000
TOTAL Production	343564	343564	351600	360000	0	280000
TOTAL Imports	236091	236091	240000	240000	0	260000
TOTAL SUPPLY	579655	579655	591600	600000	0	540000
Domestic Fresh Consump	177489	177489	184100	184666	0	179800
Exports, Fresh Only	337609	337609	340000	355000	0	300000
For Processing	64400	64400	65000	60000	0	60000
Withdrawal From Market	157	157	2500	334	0	200
TOTAL UTILIZATION	579655	579655	591600	600000	0	540000

## Production

For MY 2003, Belgian apple production is forecast by Prognosfruit ([www.prognosfruit2003.de](http://www.prognosfruit2003.de)) at 274 thousand tons, a 21 percent decrease compared to 2002. This decrease is due to frost damage at flowering and an 11 percent decrease in acreage. More recent reports point to even lower production because of reduced fruit size as a result of the drought. However, this smaller fruit size could help marketability as Belgian consumers prefer smaller fruit sizes and large sizes are exported at low prices to Russia. The Luxembourg production is forecast at 6 thousand tons, of which only half is for commercial sale.

Although Belgium's 2002 apple production had been below the five-year average and European 2002 production also 5 percent below the 2001 harvest, average price for MY 2002 was 317 Euro/ton, only one Euro/ton above the MY 2001 price level. This was due to important cheap imports. As a result, apple growers remain in difficulty and apple production is expected to further decline in the coming years.

<b>Belgium - Apple Production</b> (metric tons)			
	<b>2001</b>	<b>2002</b>	<b>2003</b>
Golden Delicious	26,350	26,350	23,780
Jonagold	184,800	190,400	143,840
Jonagored	57,350	64,750	56,730
Boskoop	31,000	27,000	15,200
Cox Orange	5,200	5,460	3,800
Elstar	12,000	13,500	10,320
Other	19,864	20,520	20,400
<b>TOTAL APPLES</b>	<b>336,564</b>	<b>348,617</b>	<b>274,070</b>

Source: Prognosfruit

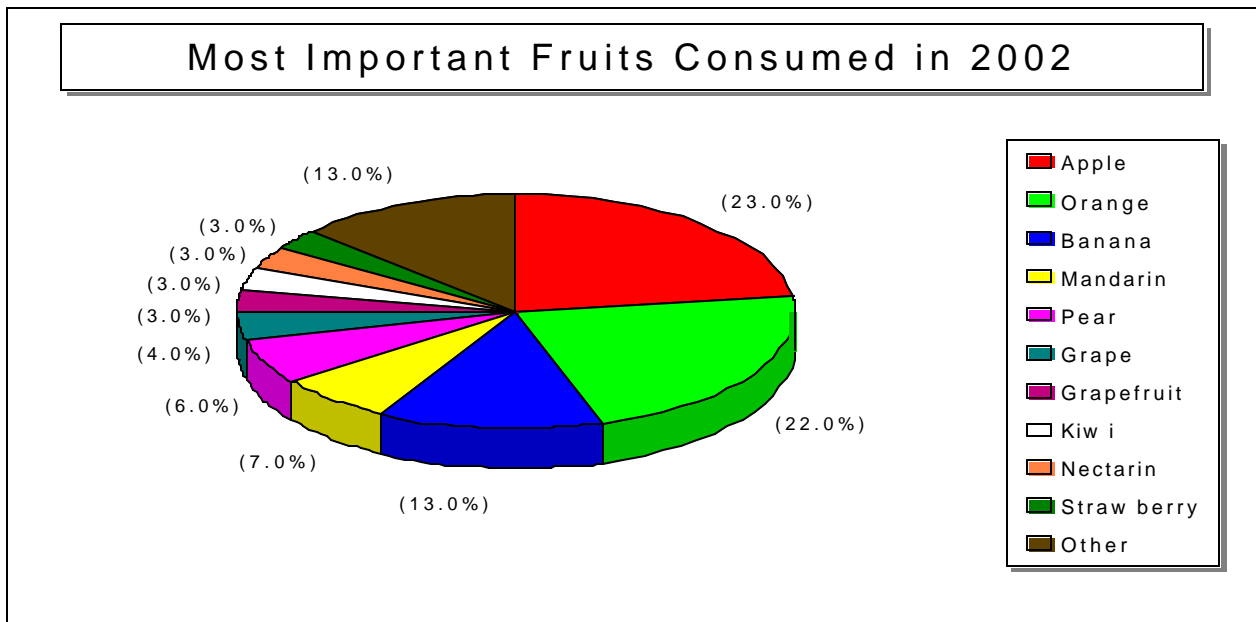
<b>Belgian Auction Markets: Apple Turnover and Value</b>			
<b>Calendar Year</b>	<b>Volume in MT</b>	<b>Price in Euro/MT</b>	<b>Value in Million Euro</b>
2000	290,724	250	72.7
2001	239,627	316	75.2
2002	262,818	283	74.4

Source: Union of Belgian Auction Markets of Horticultural Products (VBT)

### Consumption

In 2002, fresh fruit consumption increased 2.5 percent to 82 kg per capita, after a 6 percent decline to 80 kg per capita in 2001. Apple consumption increased to 18.6 kg from 17.9 kg per capita. Orange consumption was 18.2 kg, banana's 10.7 kg and pear's 4.5 kg per capita. Jonagold remains the most popular apple variety with 49 percent

market share. In 2002, consumers of fruits increased to 99.2 percent of the population. Sales



of fruit were 72.9 percent at supermarkets in 2002, compared to 60 percent five years ago.

**Marketing Policy**

Only 334 tons of apples were bought for intervention.

**Trade**

Preliminary trade figures show a 1.7 percent increase in Belgian apple imports to 240 thousand tons, while exports figures show a 5 percent increase to 355 thousand tons. The majority of imports are seasonal imports from the southern hemisphere. Exports are mainly to Germany and The Netherlands.

Import Trade Matrix					
Country	Belgium-Luxembourg				
Commodity	Fresh Apples				
Time period	July/June	Units:	Metric Tons		
Imports for:	MY2001		July01-May02		July02-May03
U.S.	56	U.S.	56	U.S.	0
Others		Others		Others	
New Zealand	76,726		59,086		60,526
France	45,909		44,831		44,280
Netherlands	39,766		34,267		39,126
Argentina	27,758		25,239		23,656
South-Africa	14,565		9,555		17,263
Italy	13,458		11,991		13,279
Total for Others	218182		184969		198130
Others not Listed	17,853		14,140		14,594
Grand Total	236091		199165		212724

Source: Belgian National Bank and Luxembourg Statistic Service (STATEC)

Export Trade Matrix					
Country	Belgium-Luxembourg				
Commodity	Fresh Apples				
Time period	July/June	Units:	Metric Tons		
Exports for:	MY2001		July01-May02		July02-May03
U.S.	0	U.S.	0	U.S.	0
Others		Others		Others	
Germany	134,377		112,423		148,618
Netherlands	70,237		58,873		73,373
France	40,914		35,733		25,192
Russia	31,492		28,423		40,433
Belorussia	13,276		13,169		2,237
United Kingdom	5,306		4,427		12,342
Total for Others	0	253048	253048	0	302195
Others not Listed	42,007		30,971		24,512
Grand Total	42007		284019		326707

Source: Belgian National Bank and Luxembourg Statistic Service (STATEC)

## Fresh Pears

PSD Table						
Country	Belgium-Luxembourg					
Commodity	Fresh Pears					(HA)(1000 TREES)(MT)
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		07/2001		07/2002		07/2003
Area Planted	7135	7135	7350	7350	0	7760
Area Harvested	6600	6600	6850	6950	0	7360
Bearing Trees	9500	9500	9800	9950	0	10500
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	9500	9500	9800	9950	0	10500
Commercial Production	88676	88676	170985	170985	0	142400
Non-Comm. Production	1000	1000	1200	1200	0	100
TOTAL Production	89676	89676	172185	172185	0	142500
TOTAL Imports	85766	89702	65000	72500	0	75000
TOTAL SUPPLY	175442	179378	237185	244685	0	217500
Domestic Fresh Consump	40419	44355	45185	46534	0	46500
Exports, Fresh Only	132441	132441	185000	180000	0	160000
For Processing	2300	2300	2500	14800	0	8500
Withdrawal From Market	282	282	4500	3351	0	2500
TOTAL UTILIZATION	175442	179378	237185	244685	0	217500

## Production

For MY 2003, Prognosfruit forecasts Belgian pear production at 142 thousand tons, an 18 percent decrease compared to 2002. Doyenné and Durondeau varieties suffered yield decreases of up to 70 percent because of frost damage at flowering, while main variety Conference showed a 4 percent production decrease and a 6 percent increase in acreage. As pear production is more profitable, Belgian fruit producers continue to switch from apples to pears.

As a result of a larger production in 2002, average pear prices for MY 2002 decreased to 536 Euro/ton, compared to 906 Euro/ton in MY 2001.



<b>Belgium Pear Production</b> (metric tons)			
	<b>2001</b>	<b>2002</b>	<b>2003</b>
Conference	81,240	135,400	130,680
Doyenné du Comice	2,640	21,120	6,400
Durondeau	3,400	10,625	3,120
Other	1,225	3,840	2,200
<b>TOTAL PEARS</b>	<b>88,505</b>	<b>172,640</b>	<b>142,400</b>

Source: Prognosfruit

<b>Belgian Auction Markets: Pear Turnover and Value</b>			
Calendar Year	Volume in MT	Price in Euro/MT	Value in Million Euro
2000	135,730	520	70.6
2001	128,516	598	76.8
2002	105,166	652	69.1

Source: Union of Belgian Auction Markets of Horticultural Products (VBT)

### **Consumption**

In 2002, pear consumption decreased slightly to 4.5 kg per person, compared to 4.7 kg per person in 2001. Variety Conference captured almost half of pear sales.

### **Marketing Policy**

In MY 2002, 3,351 tons of pears were taken in intervention, more than a tenfold increase compared to MY 2001.

### **Trade**

As a result of the higher domestic production, import figures for MY 2002 show a 20 percent decrease compared to MY 2001 and at the same time MY 2002 pear exports increased by 35 percent compared to the previous year.

Import Trade Matrix					
Country	Belgium-Luxembourg				
Commodity	Fresh Pears				
Time period	July/June	Units:	Metric Tons		
Imports for:	MY2001		July01-May02		July02-May03
U.S.	0	U.S.	0	U.S.	91
Others		Others		Others	
Argentina	38,315		37,160		27,250
South-Africa	16,042		13,483		13,419
France	11,214		11,141		9,211
Netherlands	8,887		7,653		11,053
Spain	8,668		8,535		2,346
Total for Others	0		77972		63279
Others not Listed	6,576		5,859		4,276
Grand Total	6576		83831		67646

Source: Belgian National Bank and Luxembourg Statistic Service (STATEC)

Export Trade Matrix					
Country	Belgium-Luxembourg				
Commodity	Fresh Pears				
Time period	July/June	Units:	Metric Tons		
Exports for:	MY2001		July01-May02		July02-May03
U.S.	0	U.S.		U.S.	
Others		Others		Others	
Germany	30,670		25,346		32,255
Netherlands	23,176		22,170		29,973
France	21,525		18,562		21,096
Russia	19,840		19,480		32,385
United Kingdom	9,194		8,814		14,662
Norway	7,267		7,267		8,349
Spain	6,341		6,321		15,854
Total for Others	118013		107960		154574
Others not Listed	14,428		11,998		15,837
Grand Total	132441		119958		170411

Source: Belgian National Bank and Luxembourg Statistic Service (STATEC)