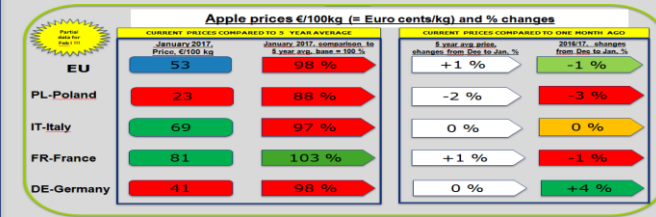
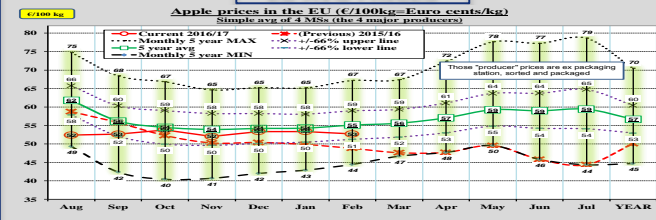
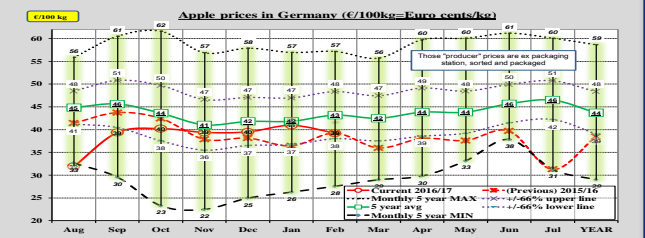
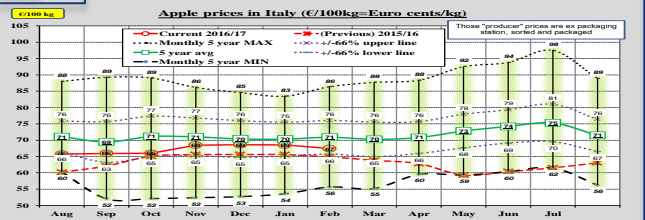
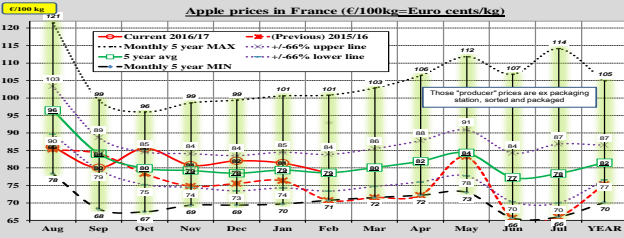
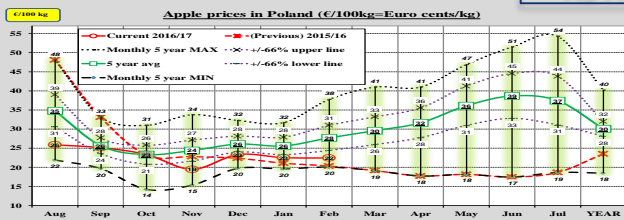


Prices

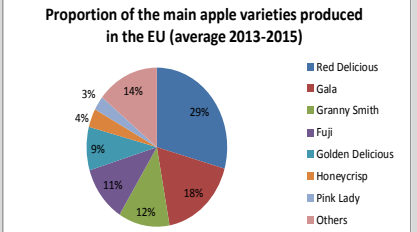
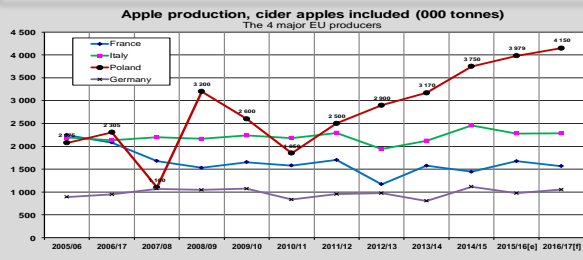
EU AVG PRICES



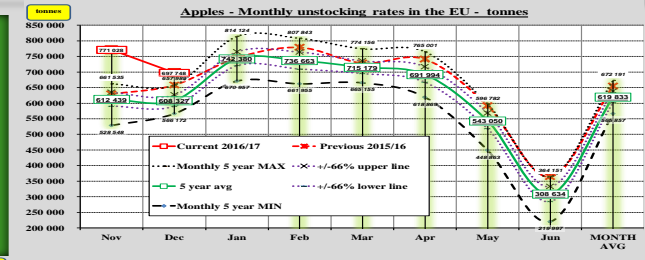
MS PRICES



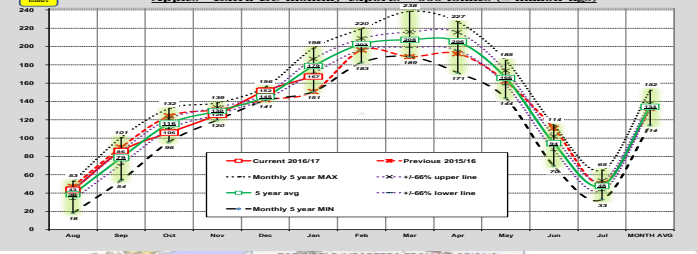
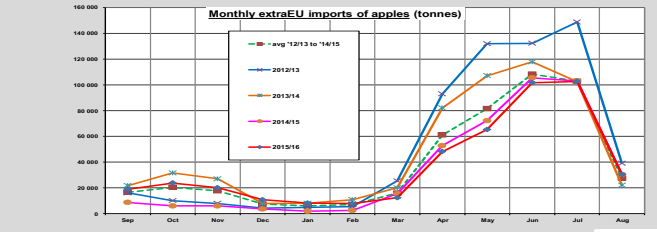
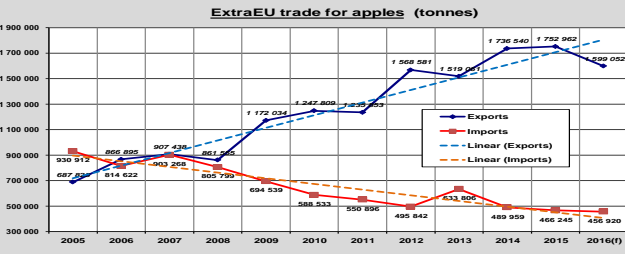
Production



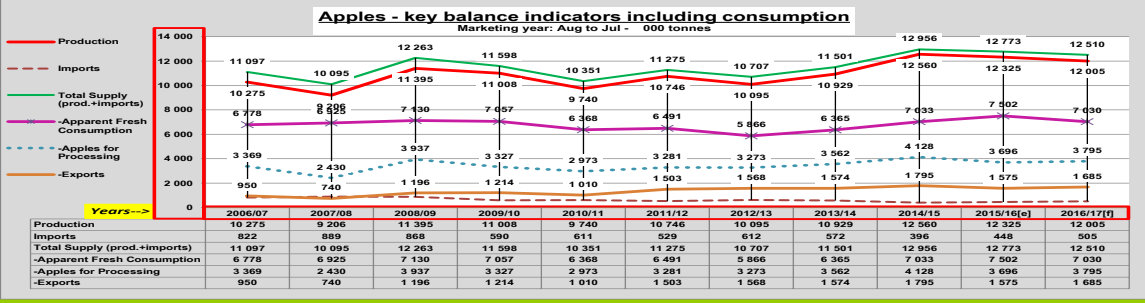
Stocks



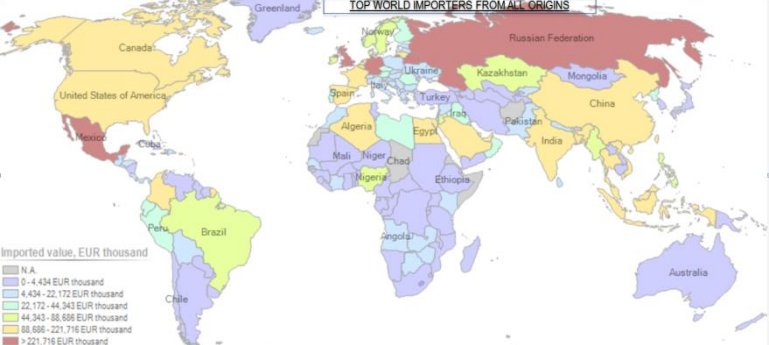
Trade



EU Balance



Export diversification





INDEX

European
Commission

0. Summary overview, market update

1. Prices

- * EU prices

- * MS prices for major producers

2. Production (by variety + extreme weather events + stocks)

3. Trade

- * Evolution of the trade balance

- * Import monitoring

- * Export development

4. Key balance indicators including CONSUMPTION

5. Export diversification

0. SUMMARY OVERVIEW, MARKET UPDATE

1. Apple prices in Poland, number 1 producer in volume terms in the EU, are recovering and approaching season levels (reference period: 5 preceeding marketing years);
2. Unstocking rates during the past November and December were at at record high levels (provisional figures);
3. New extra-EU export destinations, including most notably China, help to sustain prices and are just slightly below the 5 year average during the last 5 months (Aug to Jan).

Background

Bakground information on the market situation

1. EU production during the current marketing year is estimated to be 3% lower than in the preceding marketing year;
2. The Polish crop is 4% larger but, as the percentage of apples for processing moves from 60% to 40%, the supply of fresh apples in Poland is 30% smaller this marketing year when compared to the preceeding one;
3. Poland (1st EU volume producer) has got access to the Chinese market at the end of 2016 and, together with other new destinations, might result on more extra-EU export opportunities; EU exports from Aug '16 to Jan '17 are almost equal (-0,8 %) to the preceeding 5 year average;
4. Demand this winter, under low temperatures, is estimated to be firm;
5. In conclusion, price prospects for fresh apples in a context of lower stocks during the current marketing year are better than in the previous marketing year.



1. PRICES

1.1. EU Prices

1.2. MS prices for major producers

* Poland (1st EU28 volume producer)

* Italy (2nd)

* France (3rd)

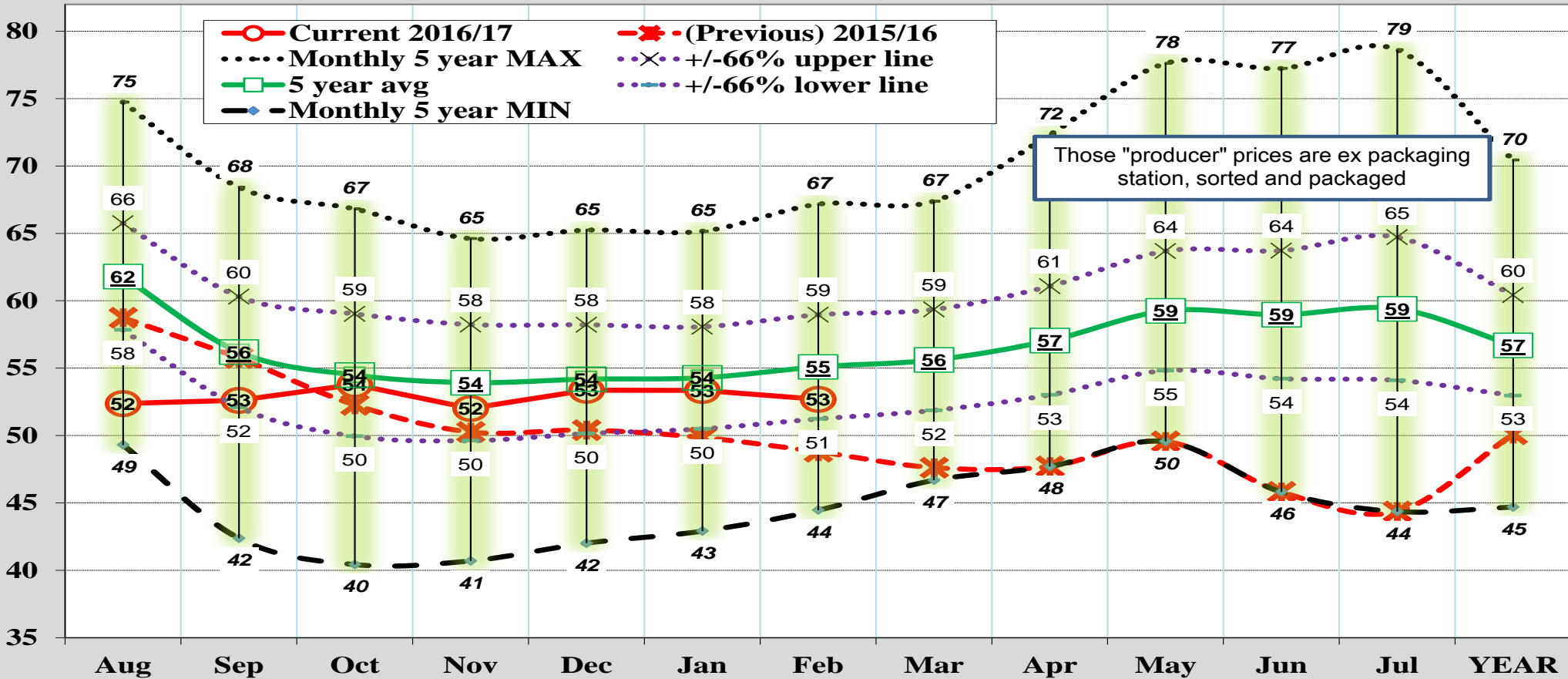
* Germany (4th)



€/100 kg

Apple prices in the EU (€/100kg=Euro cents/kg)

Simple avg of 4 MSs (the 4 major producers)



Apple prices €/100kg (= Euro cents/kg) and % changes

Partial data for Feb I !!!

CURRENT PRICES COMPARED TO 5 YEAR AVERAGE

January 2017,
Price, €/100 kg

January 2017, comparison to
5 year avg, base = 100 %

53

98 %

23

88 %

69

97 %

81

103 %

41

98 %

CURRENT PRICES COMPARED TO ONE MONTH AGO

5 year avg price,
changes from Dec to Jan, %

2016/17, changes
from Dec to Jan, %

+1 %

-1 %

-2 %

-3 %

0 %

0 %

+1 %

-1 %

0 %

+4 %

EU

PL-Poland

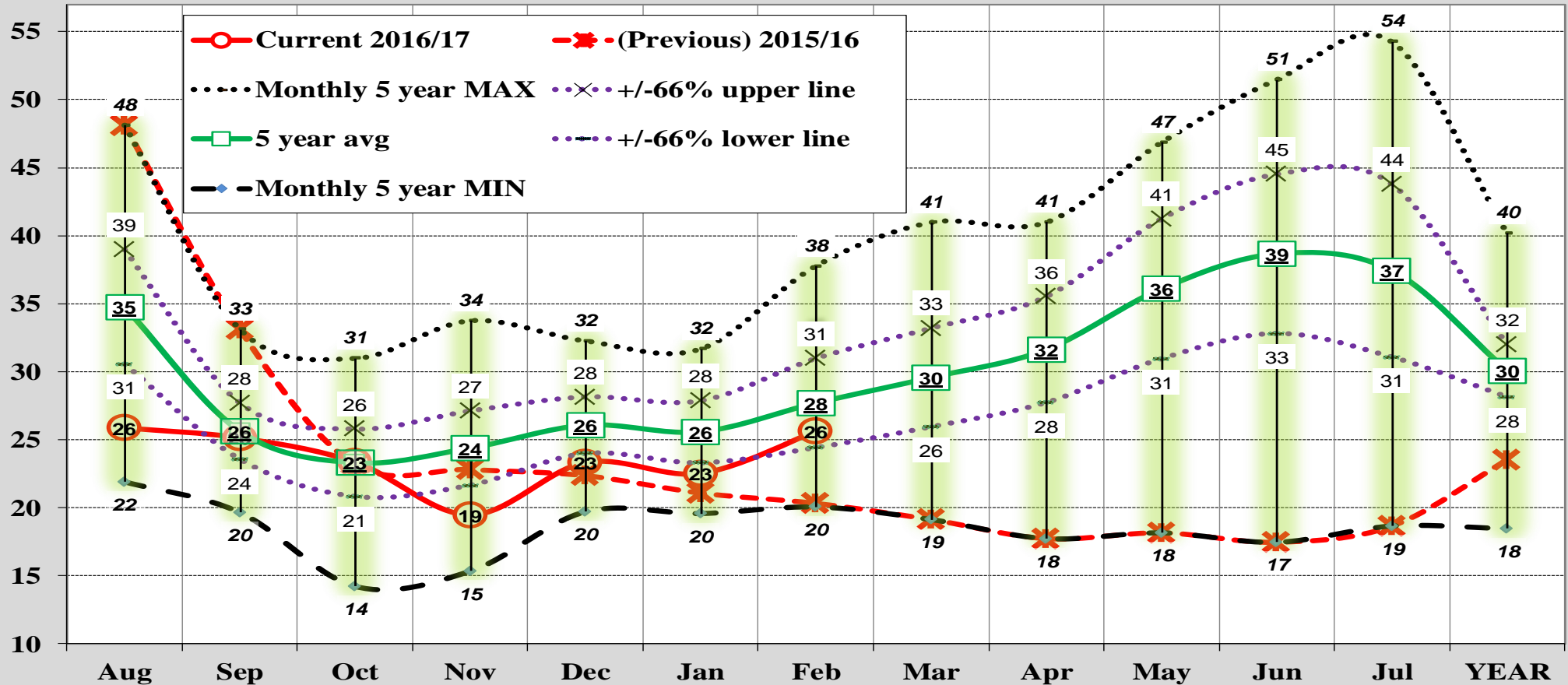
IT-Italy

FR-France

DE-Germany

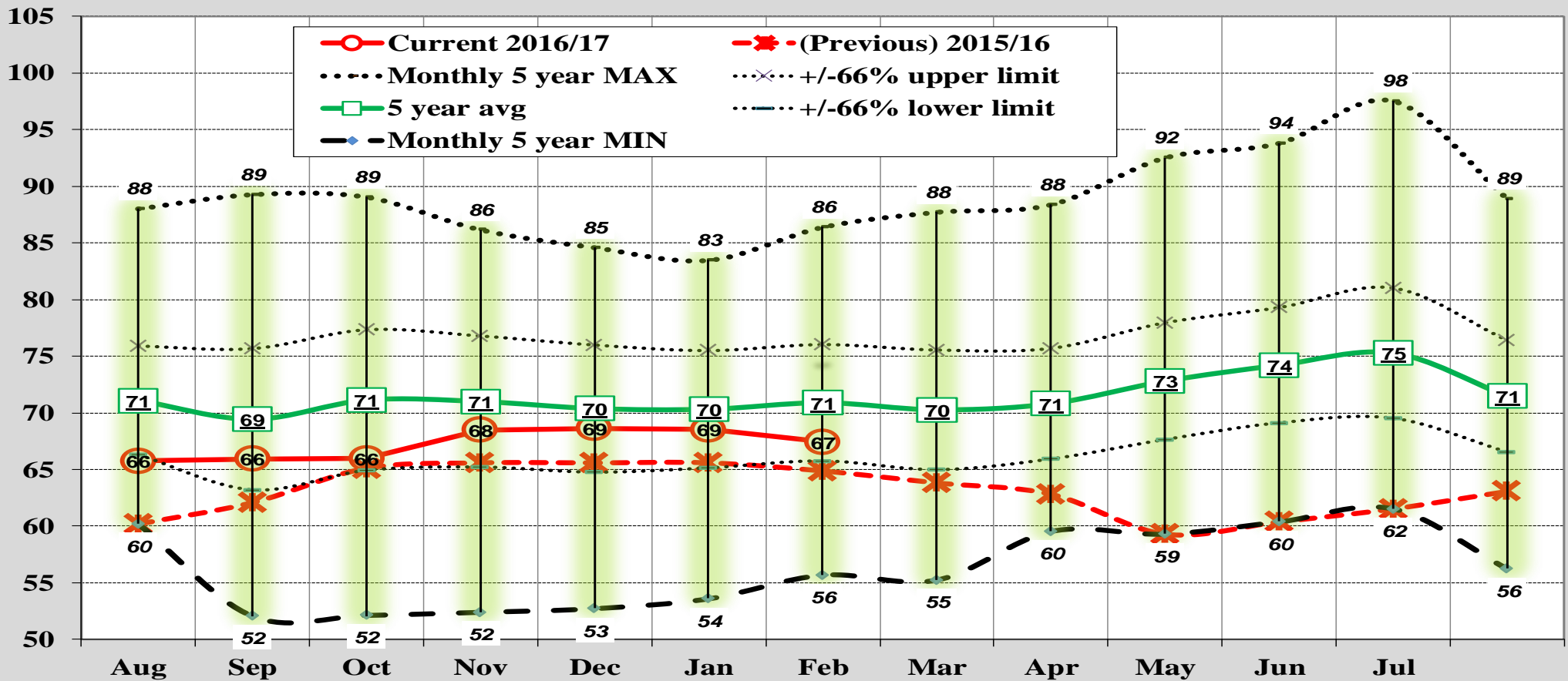
€/100 kg

Apple prices in Poland (€/100kg=Euro cents/kg)



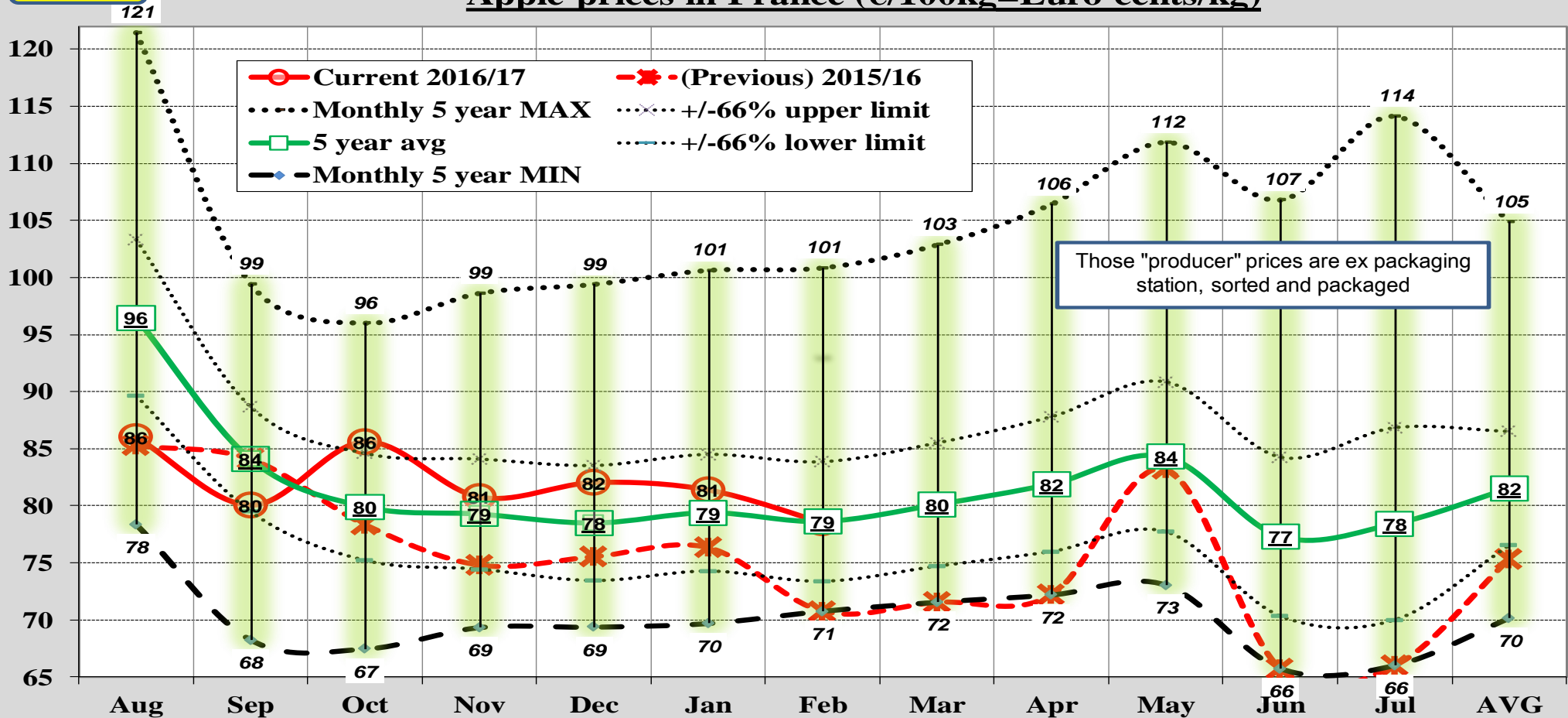
€/100 kg

Apple prices in Italy (€/100kg=Euro cents/kg)



€/100 kg

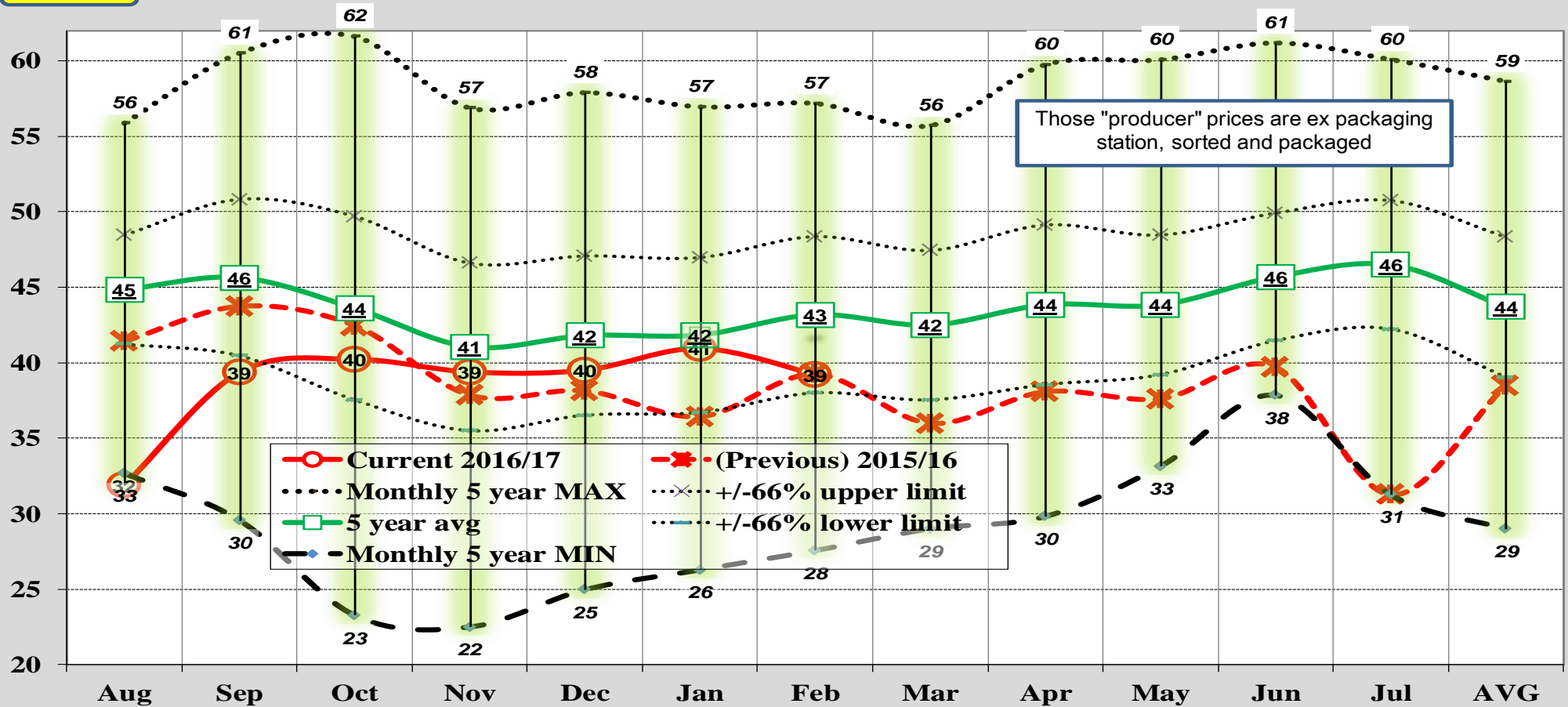
Apple prices in France (€/100kg=Euro cents/kg)



Those "producer" prices are ex packaging station, sorted and packaged

€/100 kg

Apple prices in Germany (€/100kg=Euro cents/kg)





2. PRODUCTION

2.1. EU production for MSs that are major producers

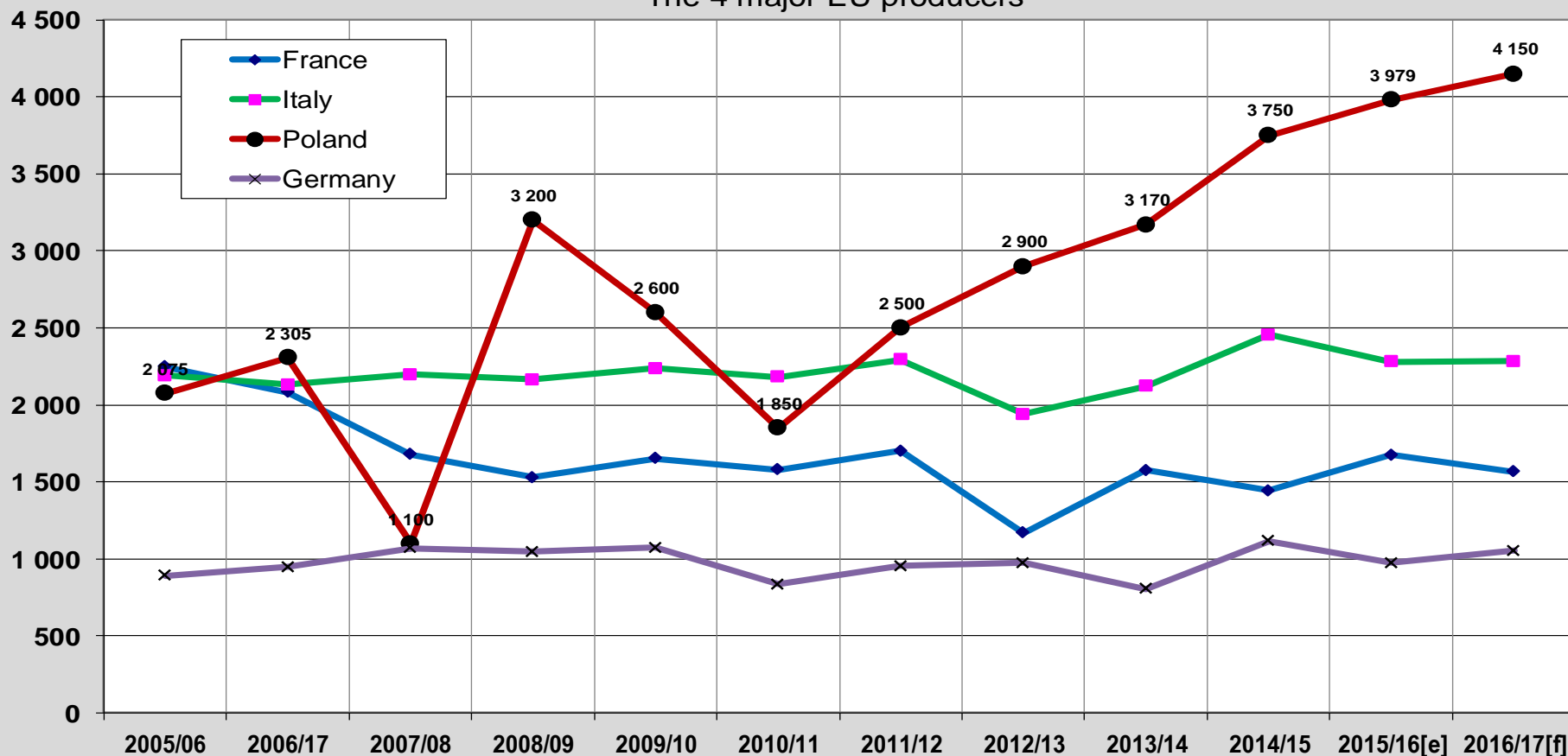
2.2. EU production by variety (%)

2.3. Extreme weather events

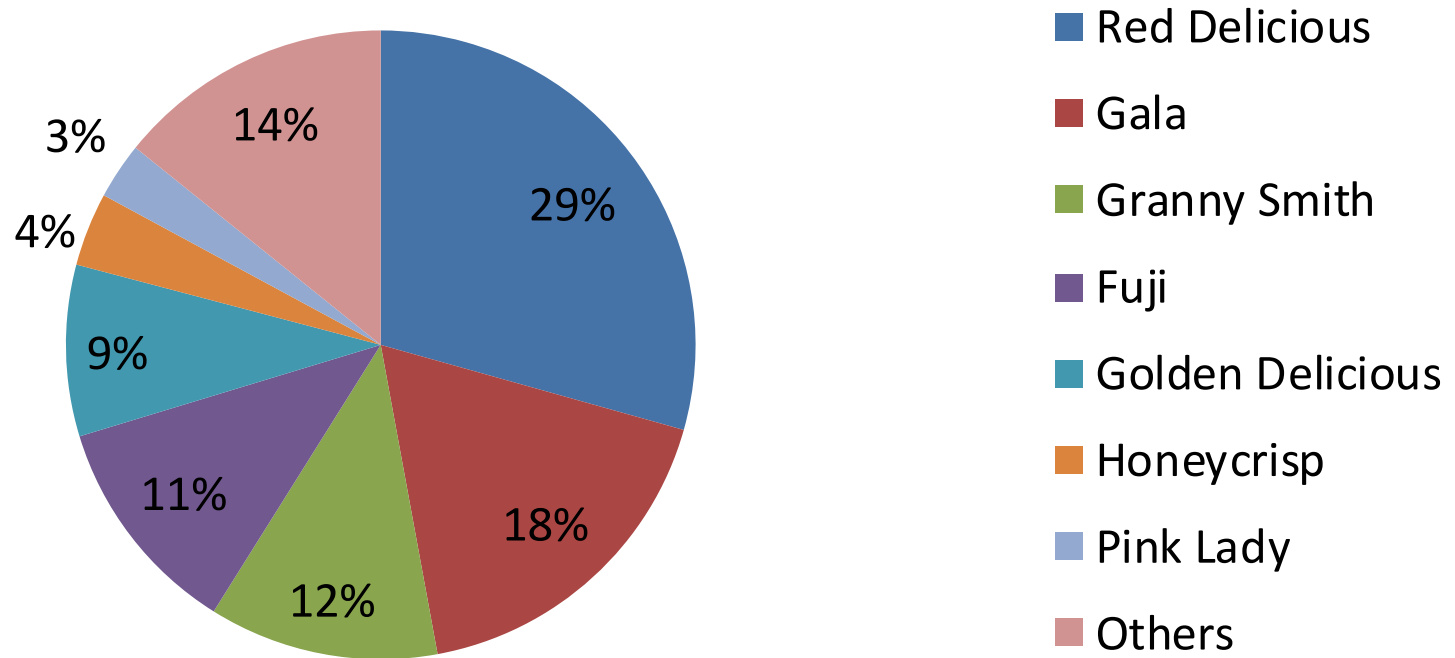
2.4. Apple stocks

Apple production, cider apples included (000 tonnes)

The 4 major EU producers



Proportion of the main apple varieties produced in the EU (average 2013-2015)



AREAS OF CONCERN - EXTREME WEATHER EVENTS

Based on weather data from 1st December 2016 until 20 January 2017

(c) EC - Joint Research Centre
MARS BULLETIN - JAN 2017



Rain deficit



Cold spell



Unusual snowfall

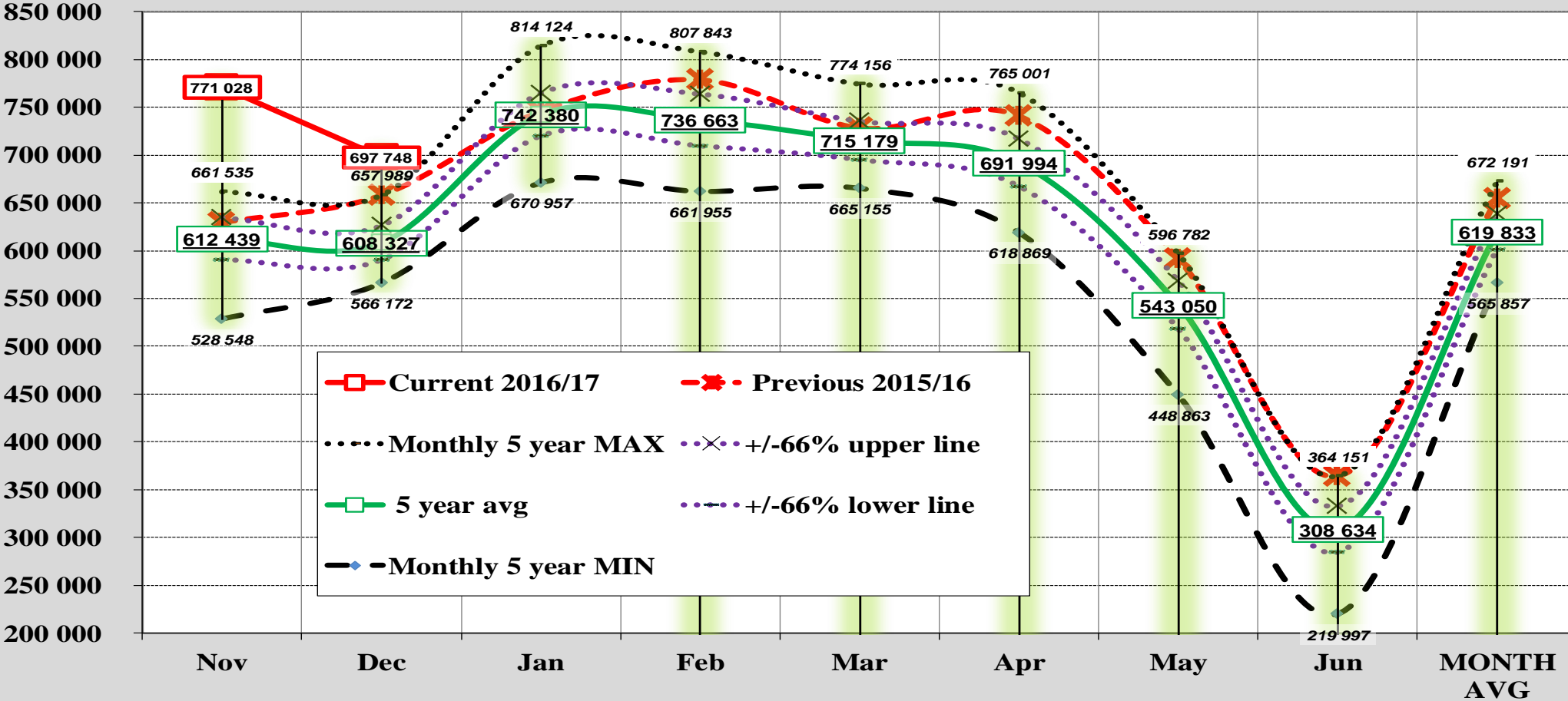


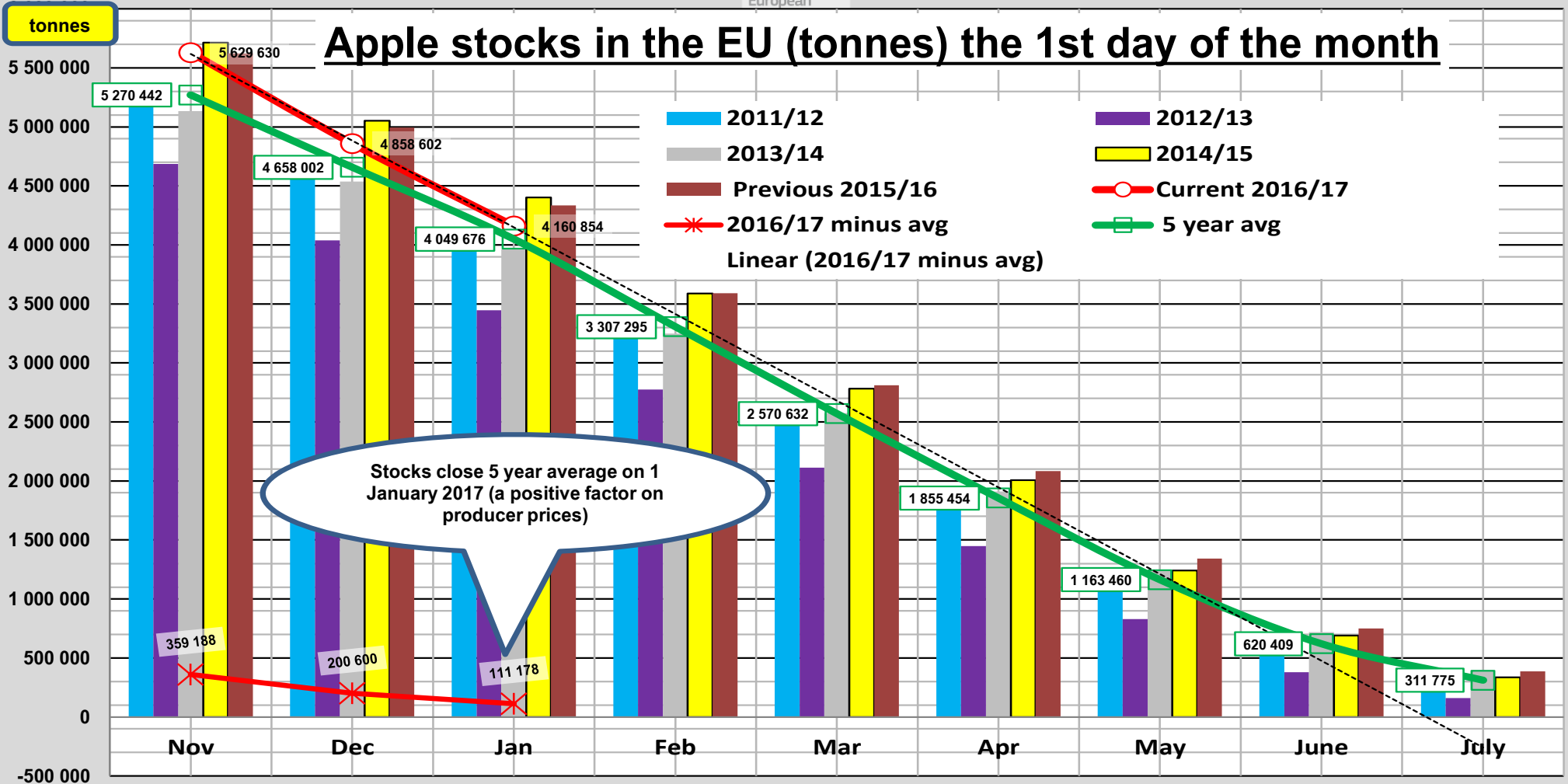
Rain surplus



Apples - Monthly unstocking rates in the EU - tonnes

tonnes







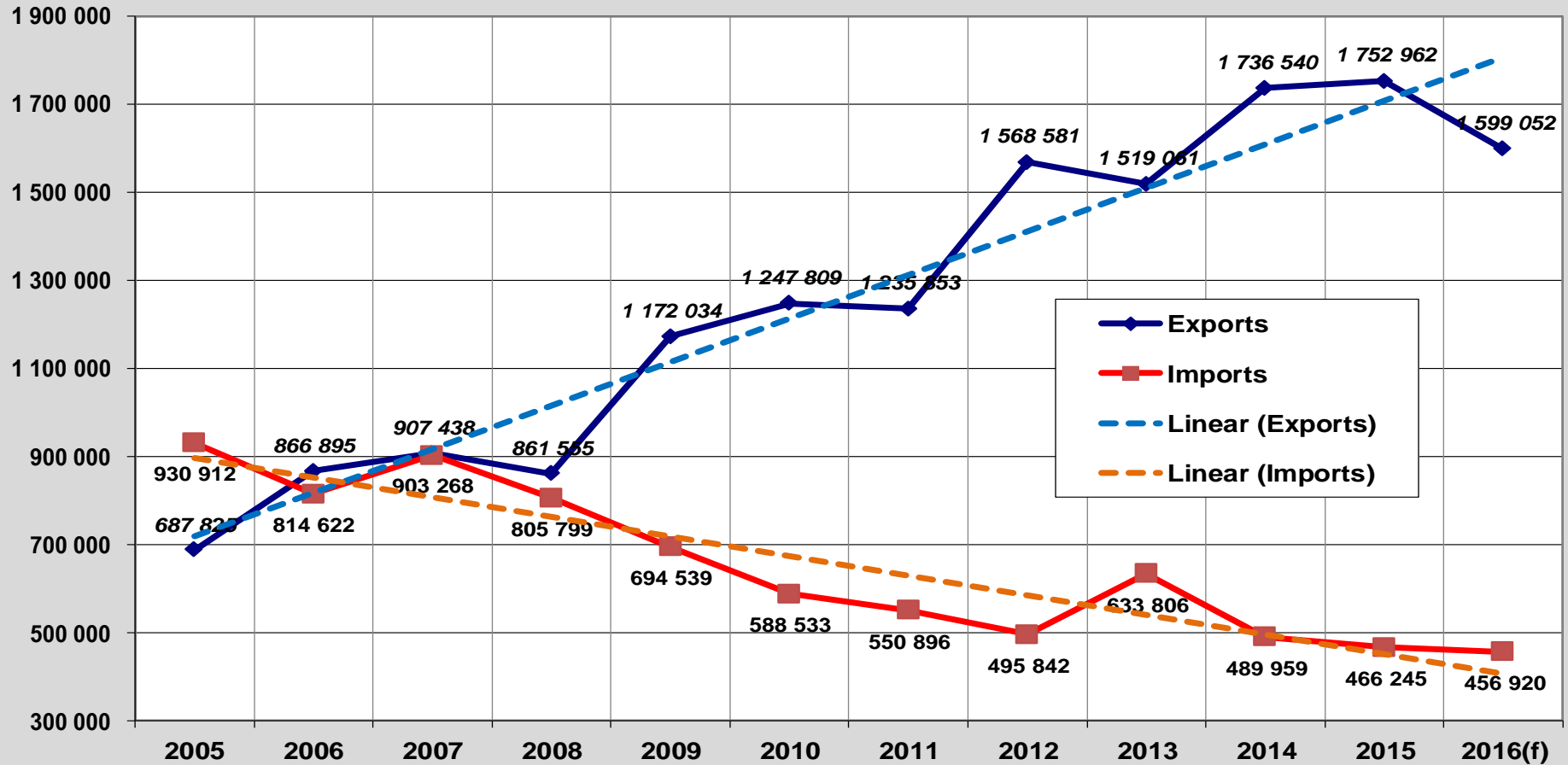
3. TRADE

3.1. Evolution of the trade balance

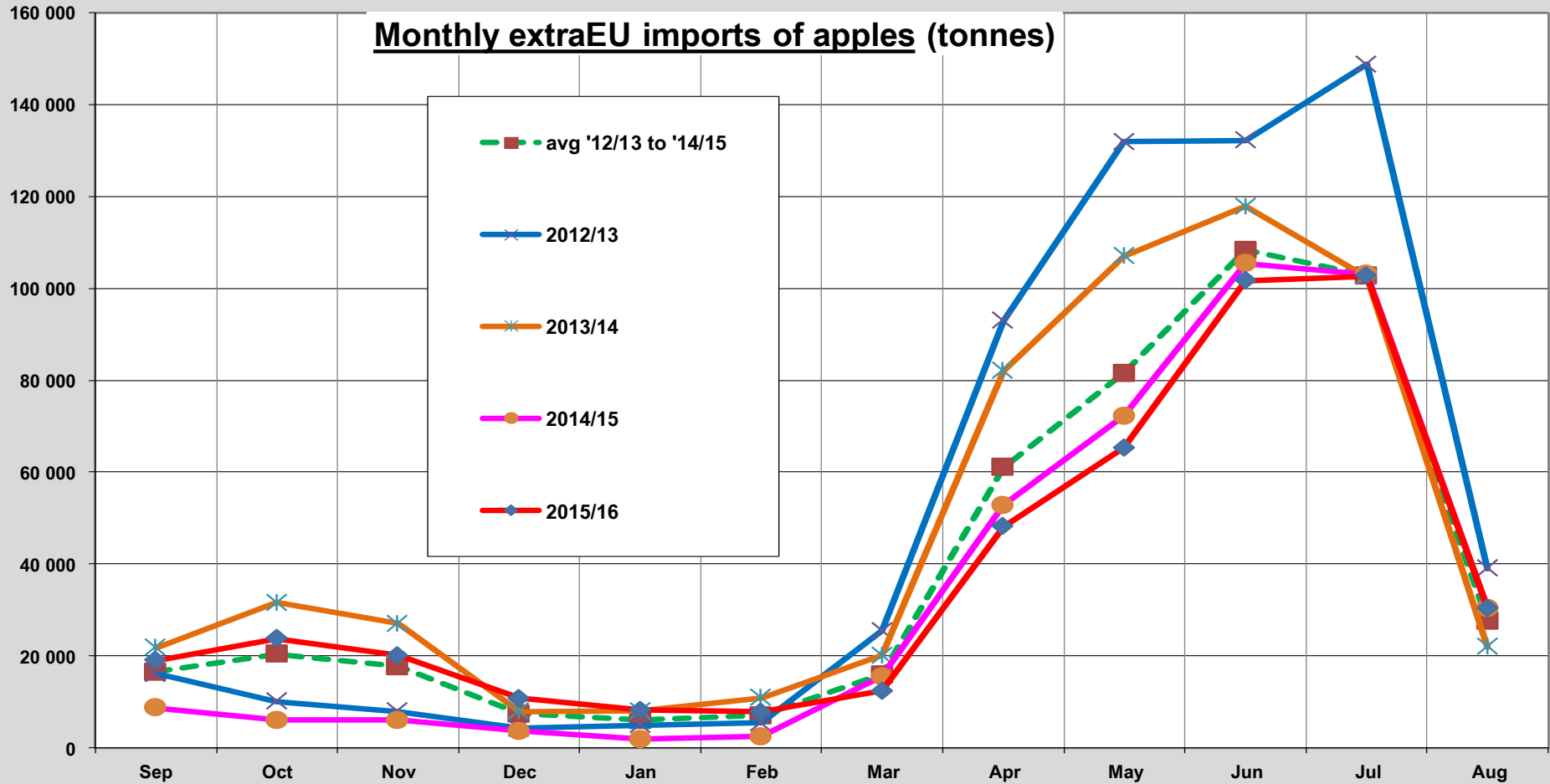
3.2. Import monitoring

2.3. Export development (export diversification is under section 5)

ExtraEU trade for apples (tonnes)



Monthly extraEU imports of apples (tonnes)

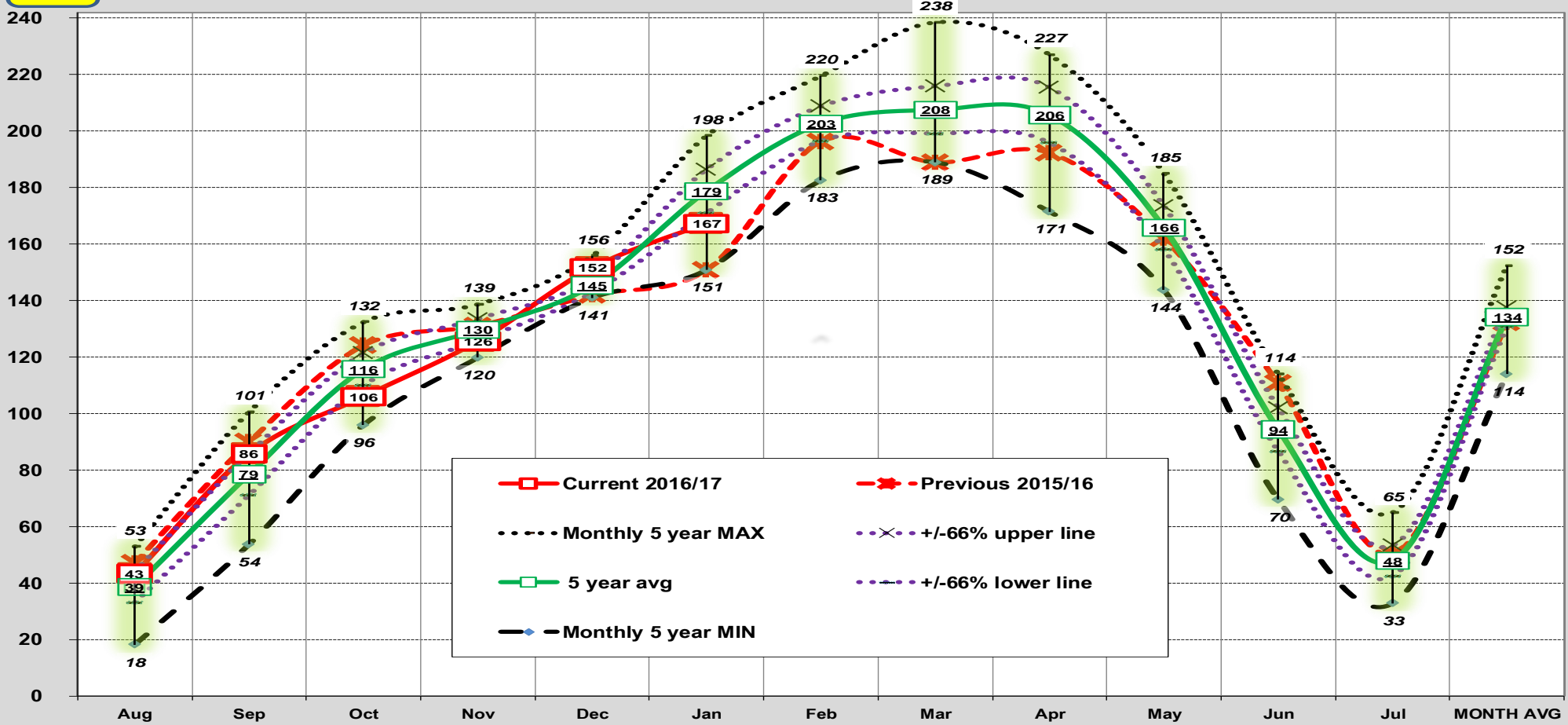




European Commission

Apples - Extra-EU monthly exports - 000 tonnes (= million kgs)

000 tonnes



4. KEY BALANCE INDICATORS

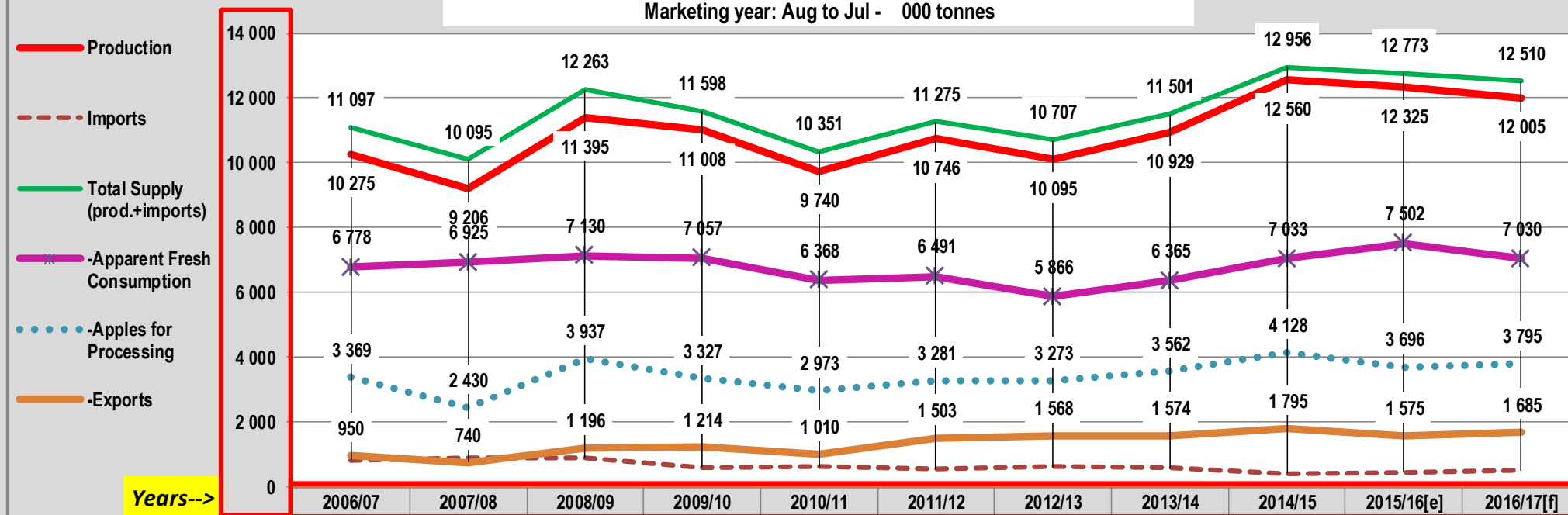
including CONSUMPTION

- Production
- Imports
- Total supply (production + imports)
 - * Apparent fresh consumption
 - * Apples for processing
 - * Exports
- Market access (Imports/Fresh consumption)
- Fresh production exported (%)
- Apparent fresh consumption (kg/person)



Apples - key balance indicators including consumption

Marketing year: Aug to Jul - 000 tonnes

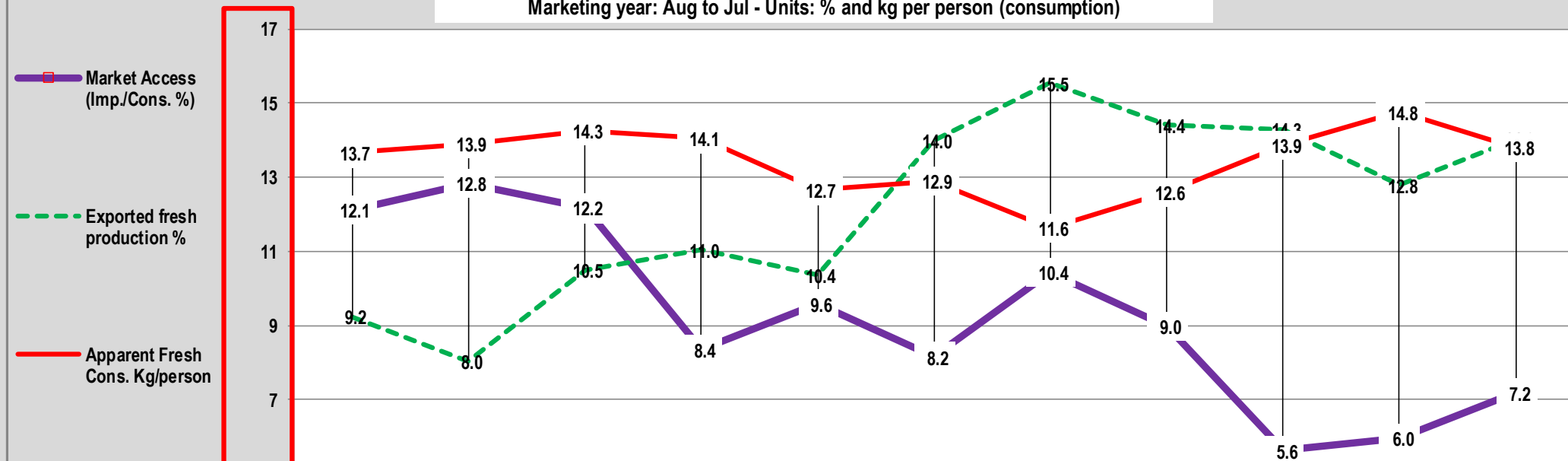


Years-->	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16[e]	2016/17[f]
Production	10 275	9 206	11 395	11 008	9 740	10 746	10 095	10 929	12 560	12 325	12 005
Imports	822	889	868	590	611	529	612	572	396	448	505
Total Supply (prod.+imports)	11 097	10 095	12 263	11 598	10 351	11 275	10 707	11 501	12 956	12 773	12 510
-Apparent Fresh Consumption	6 778	6 925	7 130	7 057	6 368	6 491	5 866	6 365	7 033	7 502	7 030
-Apples for Processing	3 369	2 430	3 937	3 327	2 973	3 281	3 273	3 562	4 128	3 696	3 795
-Exports	950	740	1 196	1 214	1 010	1 503	1 568	1 574	1 795	1 575	1 685



Apples - key balance indicators including consumption (+)

Marketing year: Aug to Jul - Units: % and kg per person (consumption)



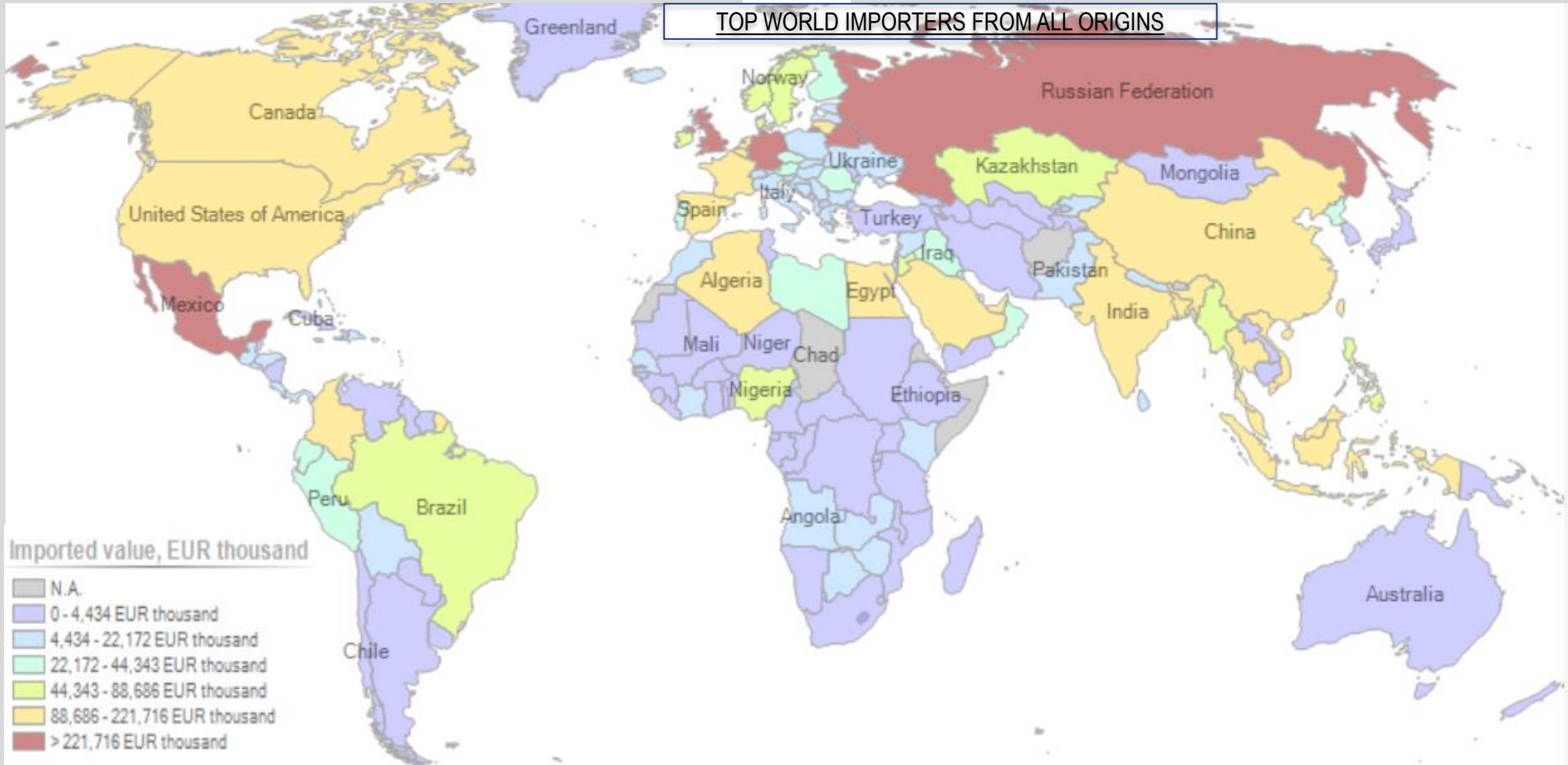
Years-->

	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16[e]	2016/17[f]
Market Access (Imp./Cons. %)	12.1	12.8	12.2	8.4	9.6	8.2	10.4	9.0	5.6	6.0	7.2
Exported fresh production %	9.2	8.0	10.5	11.0	10.4	14.0	15.5	14.4	14.3	12.8	14.0
Apparent Fresh Cons. Kg/person	13.7	13.9	14.3	14.1	12.7	12.9	11.6	12.6	13.9	14.8	13.8

5. EXPORT DEVELOPMENT

- **Map of top world importers of apples**
- **Bar chart on top world importers and annual growth rates**
- **Key trade indicators on top world importers of apples**
- **Main apple traders in the world and degree of diversification**
- **World consumption of apples, main players**

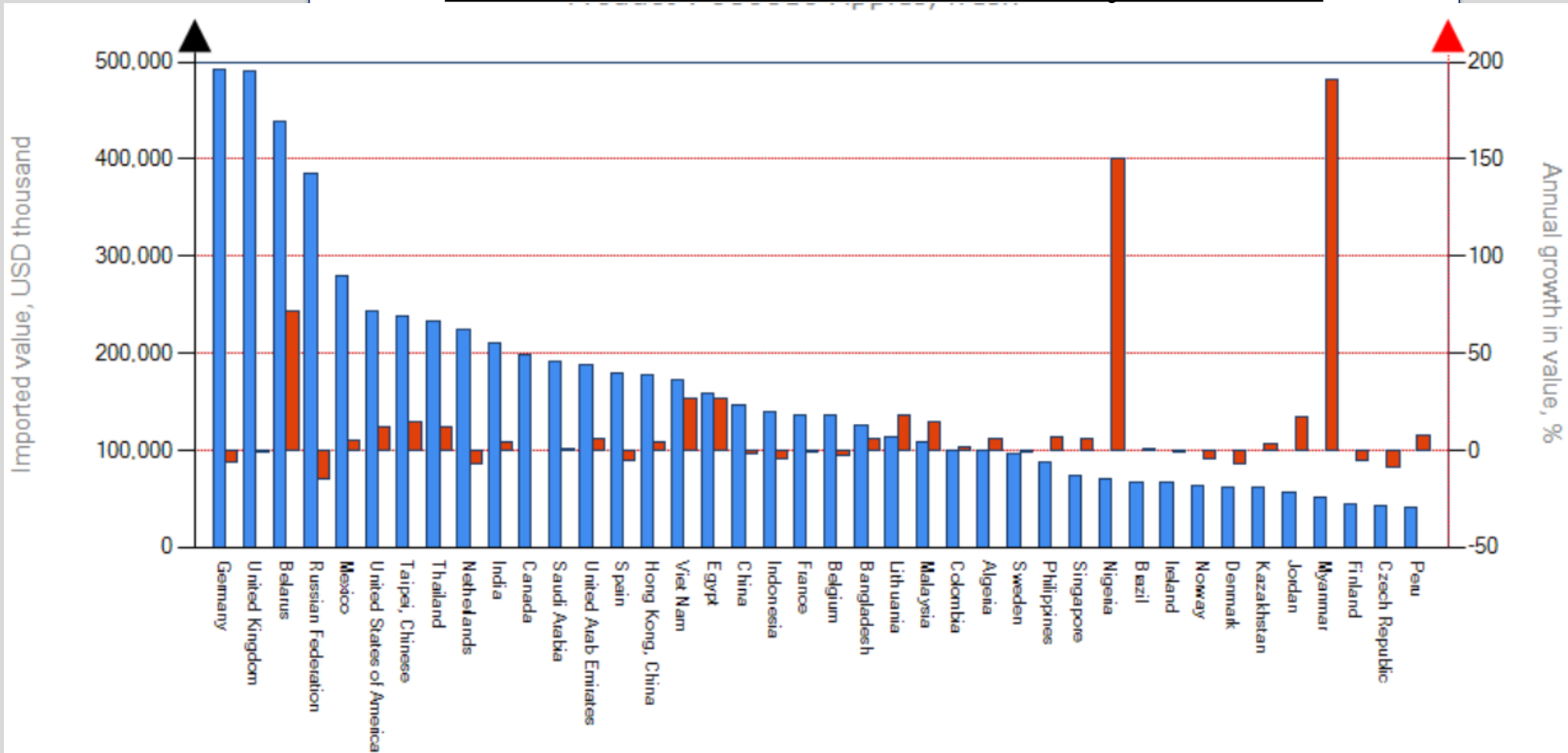
TOP WORLD IMPORTERS FROM ALL ORIGINS



Further detail



TOP WORLD APPLE IMPORTERS FROM ALL ORIGINS and % Annual growth in value 2011-15



Further detail



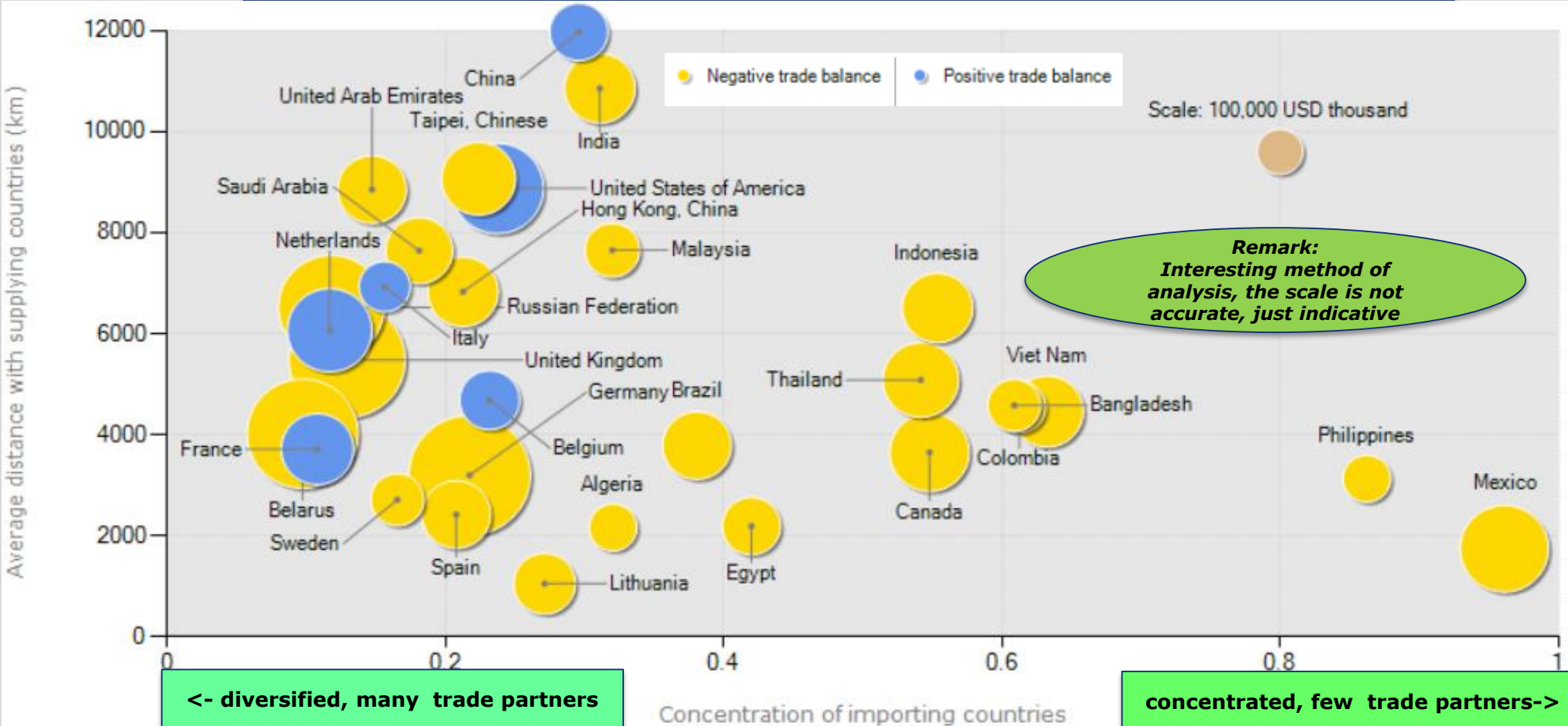
TOP WORLD APPLE IMPORTERS FROM ALL ORIGINS

Importers	Trade Indicators											Average tariff (estimated) applied by the country (%)
	Value imported in 2015 (USD thousand)	Trade balance in 2015 (USD thousand)	Quantity imported in 2015	Quantity Unit	Unit value (USD/unit)	Annual growth in value between 2011-2015 (%)	Annual growth in quantity between 2011-2015 (%)	Annual growth in value between 2014-2015 (%)	Share in world imports (%)	Average distance of supplying countries (km)	Concentration of supplying countries	
World	7,485,049	-557,194	0	No quantity		2	2	-4	100	4,994	0.08	
Germany	492,206	-417,558	641,882	Tons	767	-6	0	-17	6.6	2,925	0.23	4
United Kingdom	491,560	-475,442	426,454	Tons	1,153	-1	-2	-9	6.6	6,420	0.16	4
Belarus	439,472	-328,479	731,119	Tons	601	72	65	103	5.9	3,713	0.12	6.2
Russian Federation	384,719	-382,595	880,311	Tons	437	-15	-7	-38	5.1	5,224	0.14	5.8
Mexico	279,849	-279,338	306,402	Tons	913	5	9	1	3.7	1,696	0.97	19.3
United States of America	243,503	783,505	153,277	Tons	1,589	12	2	-14	3.3	8,578	0.33	0
Taipei, Chinese	238,701	-238,642	157,097	Tons	1,519	15	4	-2	3.2	9,633	0.25	25.9
Thailand	232,343	-231,498	159,510	Tons	1,457	12	5	36	3.1	5,467	0.49	7.4
Netherlands	225,201	-33,791	238,839	Tons	943	-7	-5	-36	3	5,897	0.12	4
India	209,944	-203,167	193,692	Tons	1,084	4	3	-10	2.8	11,252	0.34	49
Canada	197,975	-157,898	212,337	Tons	932	0	2	-21	2.6	2,903	0.67	2.5
Saudi Arabia	190,813	-188,585	204,292	Tons	934	1	2	7	2.5	7,599	0.2	0
United Arab Emirates	188,422	-169,394	180,472	Tons	1,044	6	5	-6	2.5	8,879	0.16	0
Spain	179,475	-78,089	232,268	Tons	773	-5	0	-17	2.4	2,168	0.29	4
Hong Kong, China	177,689	-125,337	165,442	Tons	1,074	4	5	20	2.4	7,088	0.23	0
Viet Nam	173,037	-172,778	120,018	Tons	1,442	27	7	-7	2.3	5,249	0.56	10.9
Egypt	158,031	-155,760	240,079	Tons	658	27	37	14	2.1	2,171	0.42	22.6
China	146,650	885,517	87,563	Tons	1,675	-2	-5	217	2	12,118	0.3	17.6
Indonesia	139,012	-138,954	84,065	Tons	1,654	-4	-19	-31	1.9	7,552	0.52	4.8
France	136,300	483,881	193,218	Tons	705	-1	3	6	1.8	4,527	0.13	4
Belgium	135,991	5,541	149,962	Tons	907	-3	-3	-10	1.8	5,546	0.24	4
Bangladesh	126,401	-126,401	177,658	Tons	711	6	4	23	1.7	4,609	0.6	25

Further detail



TOP 30 APPLE IMPORTERS AND SUPPLIERS FROM AND TO ALL ORIGINS – Value Terms

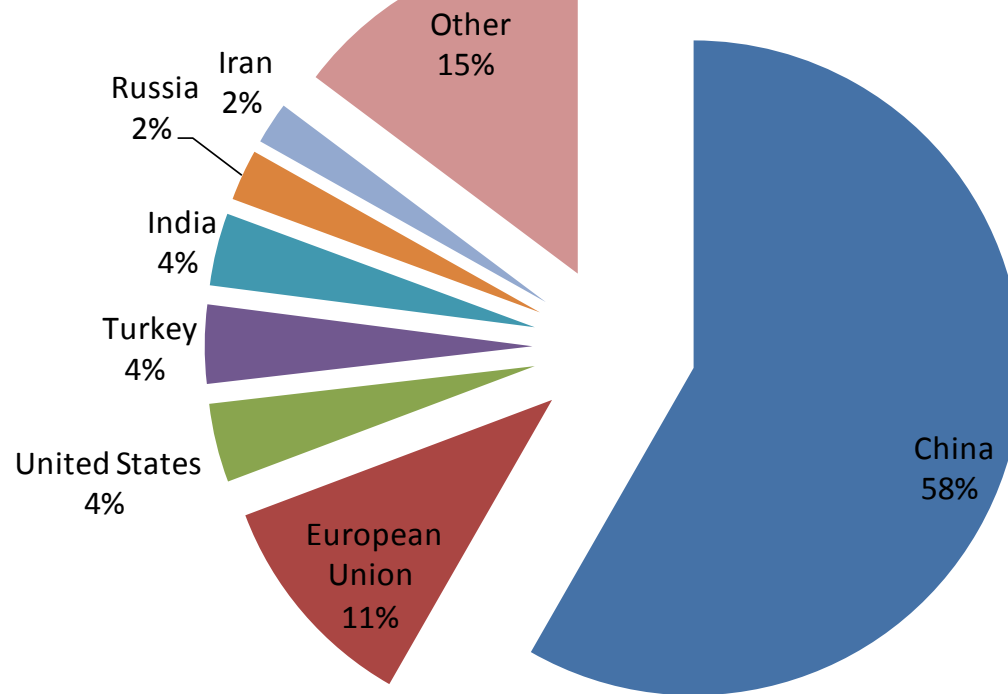


Further detail



World consumption of apples 2015/16 (volume)

Main players





End

Thank you