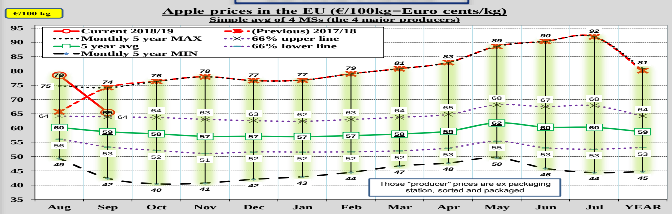
Prices

EU AVG PRICES

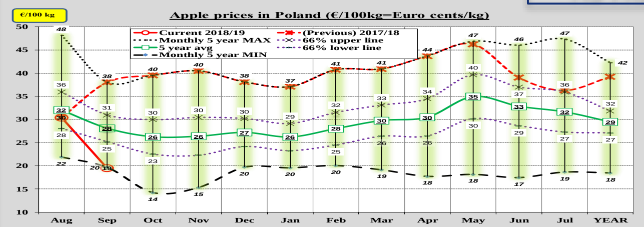


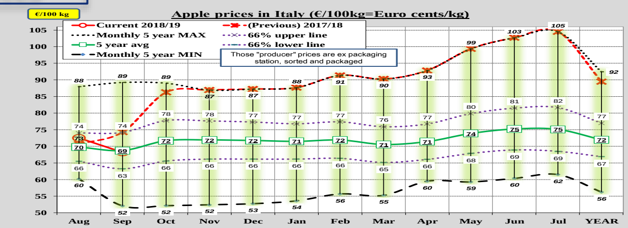
Apple prices €/100kg (= Euro cents/kg) and % changes – Sep 2018

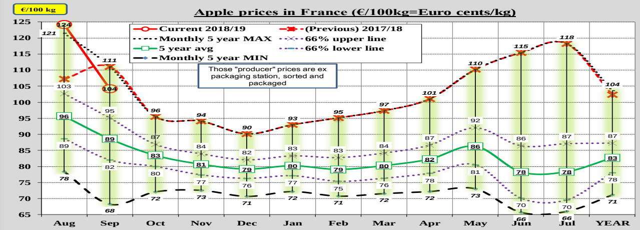
Full price data for Sep in graphs (up to week 39)

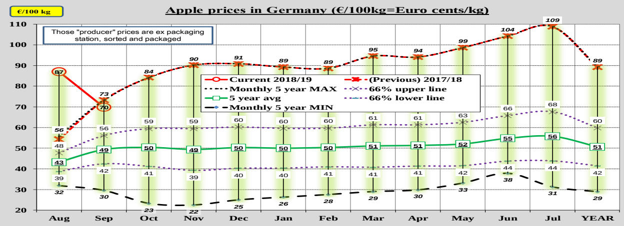
	CURRENT PRICES COMPARED TO 5 YEAR AVERAGE		CURRENT PRICES COMPARED TO ONE MONTH AGO	
	Sep 2018, Price, €/100 kg	Aug->Sep 2018, comparison to 5 year avg, base = 100 %	5 year avg price, changes from Aug to Sep %	2018, changes from Aug to Sep %
EU	65	131->111	-2 %	-17 %
PL-Poland	19	95->69	-12%	-36 %
IT-Italy	68	104->99	-2 %	-6 %
FR-France	104	130->118	-7 %	-16 %
DE-Germany	70	201->142	+14 %	-20 %

MS PRICES

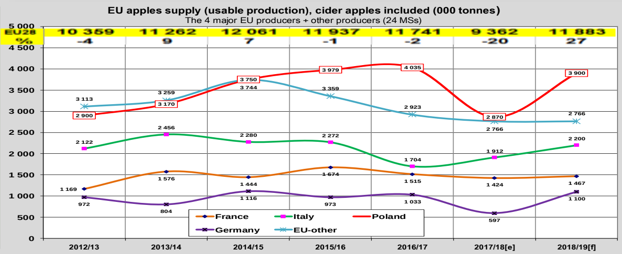


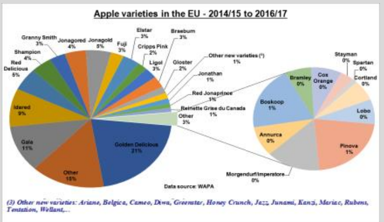




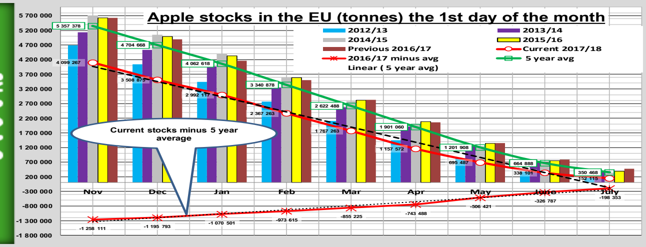


Production

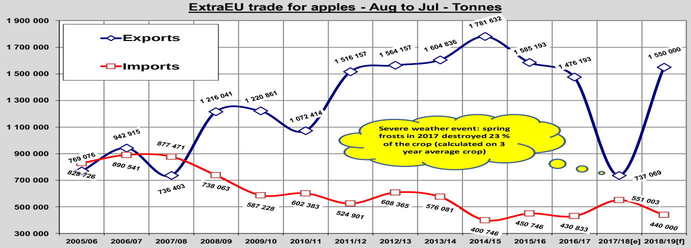


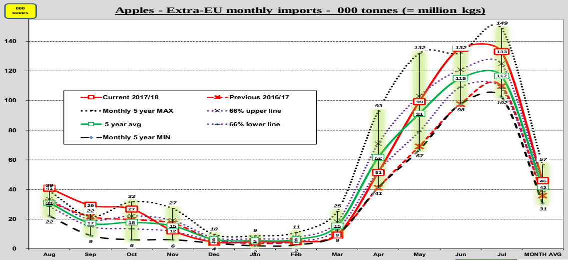


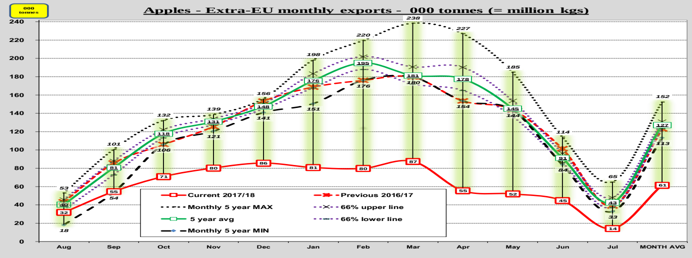
Stocks



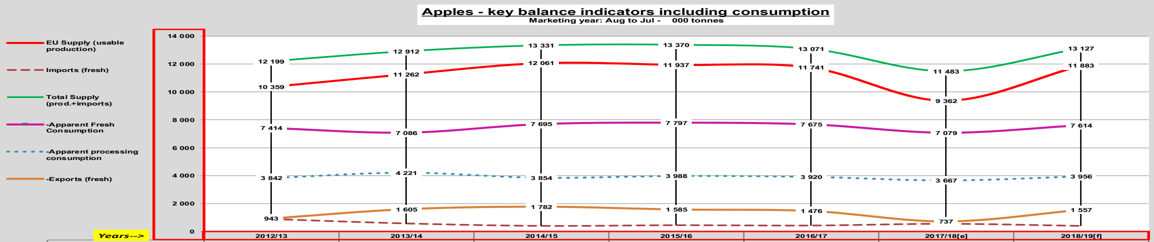
Trade





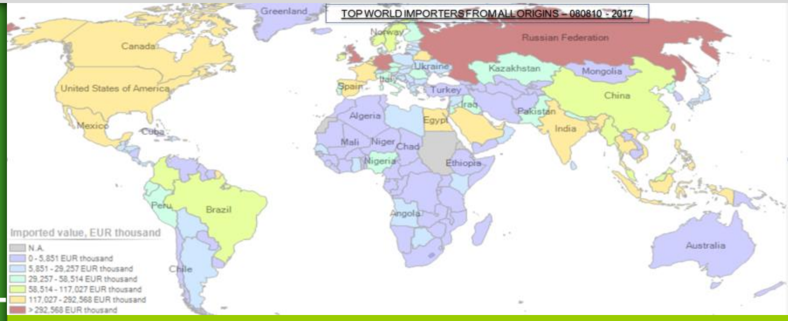


EU Balance



Years-->	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18[e]	2018/19[f]
EU Supply (usable production)	10 359	11 262	12 061	11 937	11 741	9 362	11 883
Imports (fresh)	891	576	401	451	428	551	401
Total Supply (prod.+imports)	12 199	12 912	13 331	13 370	13 071	11 483	13 127
-Apparent Fresh Consumption	7 414	7 086	7 695	7 797	7 675	7 079	7 614
-Apparent processing consumption	3 842	4 221	3 854	3 988	3 920	3 667	3 956
-Exports (fresh)	943	1 605	1 782	1 585	1 476	737	1 557

Export diversification



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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

RECENT DEVELOPMENTS – Marketing year 2018/19 (*)

1. Marketing year 2018/19 started the 1st of August. After a very small crop the preceding marketing year the ongoing season represents coming back to high volumes which in terms of prices implies moving from very high prices to lower prices.

2. EU average prices in this campaign are still above reference period average (+31% in August and +11% in September).

3. At Member State level there are significant differences: September price for France is more than 5 times the price in Poland.

4. The situation by MS in September compared to the 5 year reference period is as follows: +42% in DE, +18% in FR, -1% in IT and -31% in PL.

5. Drought did not affect significantly apple production. Poland has a big crop and there are difficulties for selling it due to lack of adaptation to demand for some varieties and especially regarding apples for processing.

(*) Adjustements to price figures are still possible and likely to happen in the context of methodological review and complementary notifications.

European Commission

0. SUMMARY OVERVIEW, MARKET UPDATE

FURTHER COMMENTS

1. **The level of stocks that is going to be transferred to the next marketing year is very small (unlike for preceding years).**

2. **Regarding the international environment, export opportunities seem to be on the rise. China, a country representing over a half of the world's production and a major exporter, suffered a severe frost that could imply an important reduction of the world's supply and, therefore, favourable conditions for EU exports in Asia and the international markets.**

3. **The crops of the Sourthern Hemisphere (-4%) and the US are decreasing when compared the the preceding one.**

European Commission

BACKGROUND – Marketing year 2017/18

1. Extreme weather events during April and May 2017, late spring frosts, are at the origin of a relatively small supply level implying high prices during this marketing year. This is the central weather event defining the ongoing marketing year.

2. The EU apple market has essentially two major "leading indicators":

   2.1. The size of the crop for the ongoing marketing year; at EU level a 19% reduction of the current crop (when compared to a 5 year reference period) results on about 40% price increase (with huge differences depending on the relative size of the crop of each MS and the historical reference level of prices); => in the current year the price band is situated well above the historical range for prices; => [PLACEMENT OF THE BAND WHEN COMPARED TO REFERENCE PERIOD AVERAGE PRICES]

   2.2 The depletion or unstocking rate month after month during the marketing year; => that rate and price evolve towards opposite directions; = [MONTHLY ADJUSTMENTS WITHIN THE BAND ABOVE]

3. The depletion or unstocking rate depends on 3 sub-factors:
   3.1 Monthly consumption;
   3.2 Monthly trade balance (the EU apple market is sensitive to extra-EU export developments) ;
   3.2 Small adjustments in terms of product expecting to go to fresh consumption
   but that due to quality issues has to go finally for processing.

4. In conclusion, the current marketing year is caracterized by a significantly smaller than average supply and very high prices.

1. PRICES

1.1. EU Prices

1.2. MS prices for major producers

* Poland (1st EU28 volume producer)

* Italy (2nd)

* France (3rd)

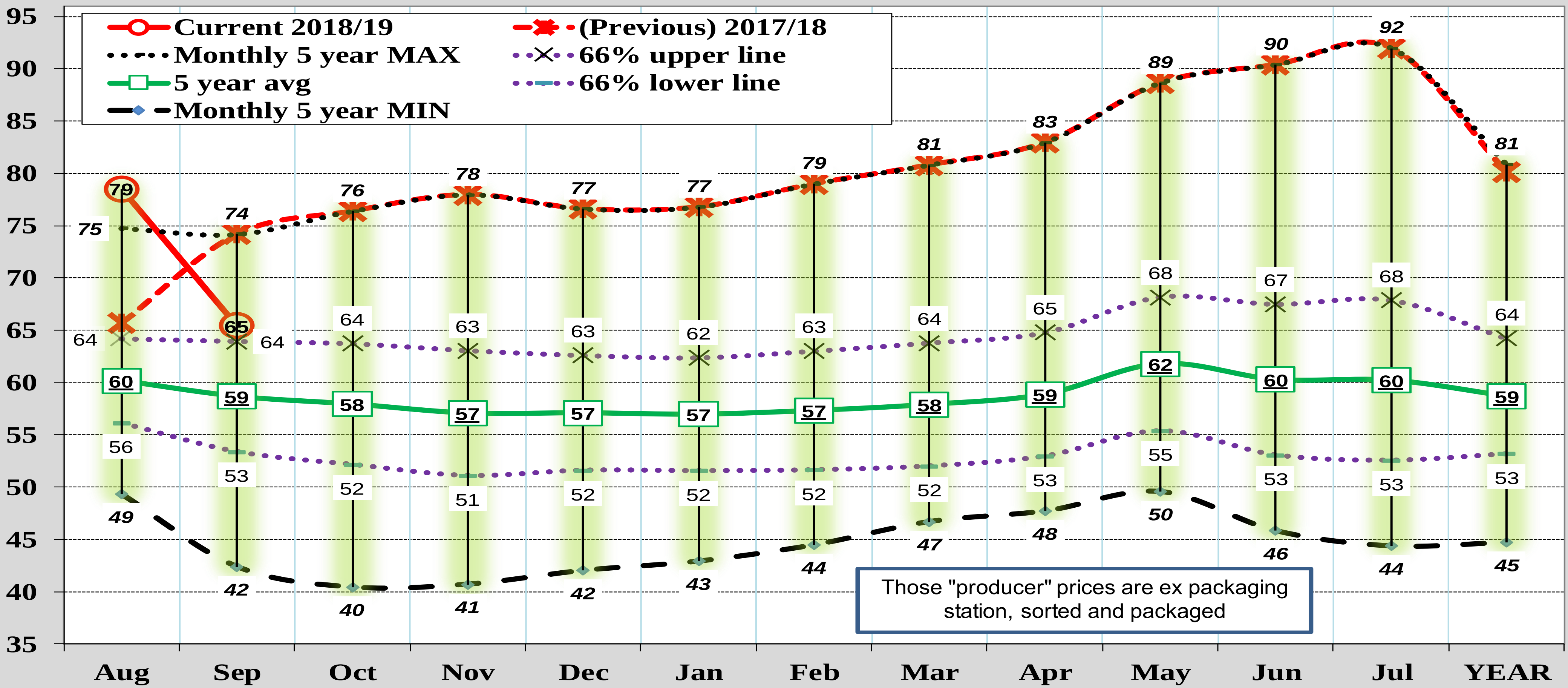
* Germany (4th)

Market summary

€/100 kg

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

Simple avg of 4 MSs (the 4 major producers)



Agriculture and Rural Development

Market summary

European Commission

Apple prices €/100kg (= Euro cents/kg) and % changes – Sep 2018

Full price data for Sep in graphs (up to week 39)

	CURRENT PRICES COMPARED TO 5 YEAR AVERAGE		CURRENT PRICES COMPARED TO ONE MONTH AGO	
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DE-Germany	70	201->142	+14 %	-20 %

Market summary

European Commission

Apple prices €/100kg (= Euro cents/kg) and % changes – Aug 2018

	CURRENT PRICES COMPARED TO 5 YEAR AVERAGE		CURRENT PRICES COMPARED TO ONE MONTH AGO	
	Aug 2018, Price, €/100 kg	Jul->Aug 2018, comparison to 5 year avg, base = 100 %	5 year avg price, changes from July to Aug %	2018, changes from July to Aug %
EU	79	160->131	+5 %	-15 %
PL-Poland	30	110->95	-3%	-16 %
IT-Italy	73	142->104	-5 %	-31 %
FR-France	118	153->130	+23 %	+5 %
DE-Germany	87	237->201	-6 %	-20 %

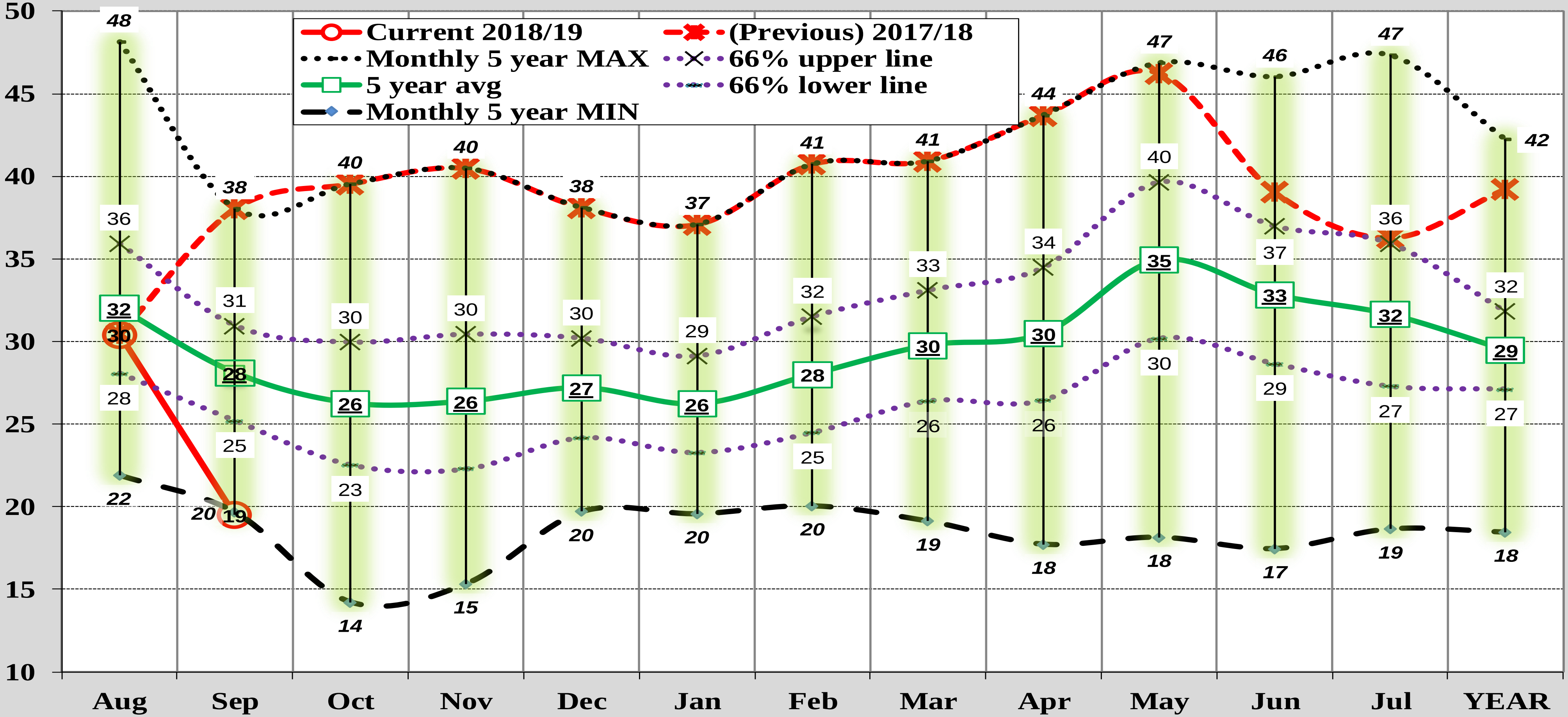
European Commission

Apple prices €/100kg (= Euro cents/kg) and % changes – July 2018

	CURRENT PRICES COMPARED TO 5 YEAR AVERAGE		CURRENT PRICES COMPARED TO ONE MONTH AGO	
	July 2018, Price, €/100 kg	July 2018, comparison to 5 year avg, base = 100 %	5 year avg price, changes from June to July %	2017/18, changes from June to July %
EU	92	160	0 %	+2 %
PL-Poland	36	110	-4%	-7 %
IT-Italy	105	142	0 %	+2 %
FR-France	118	153	+1 %	+2 %
DE-Germany	109	237	0 %	+4 %

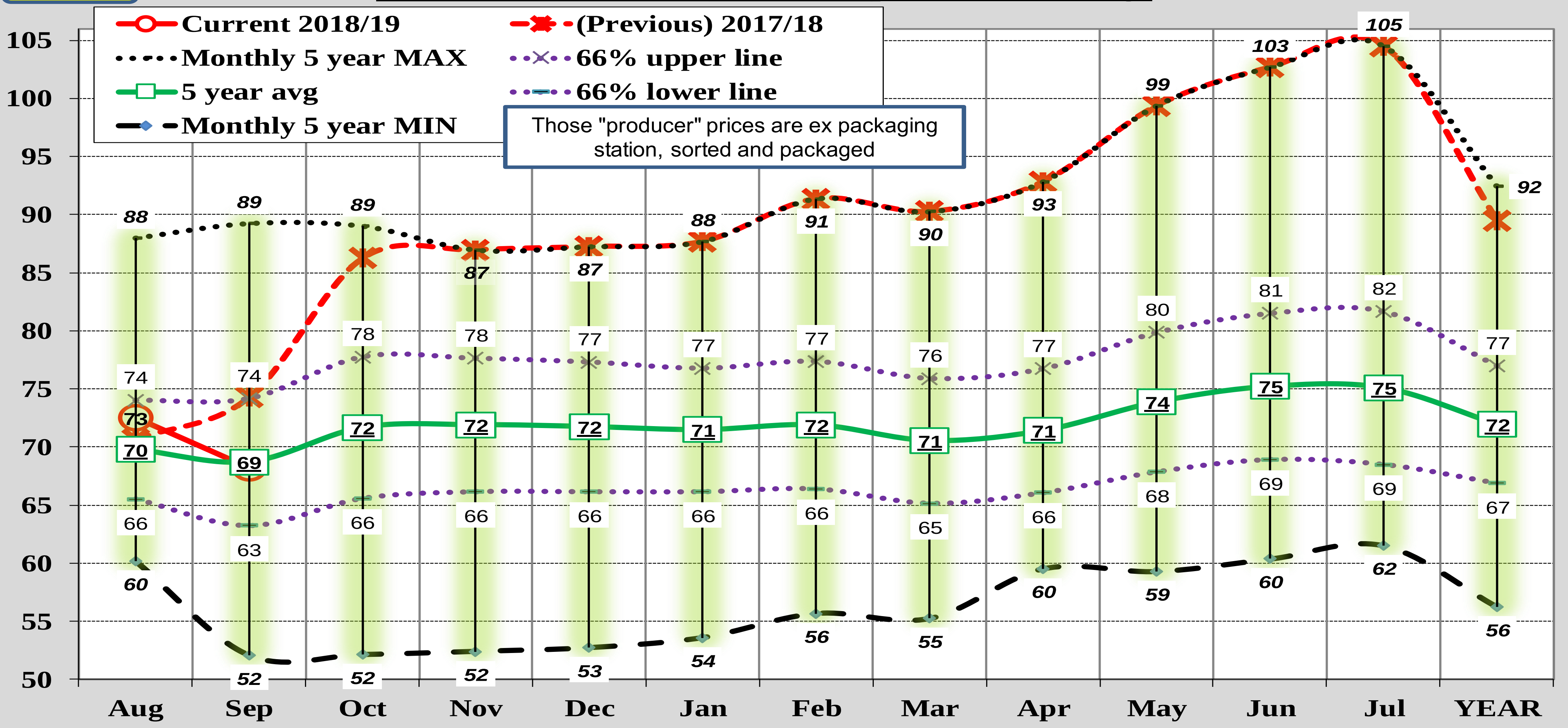
€/100 kg

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



€/100 kg

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



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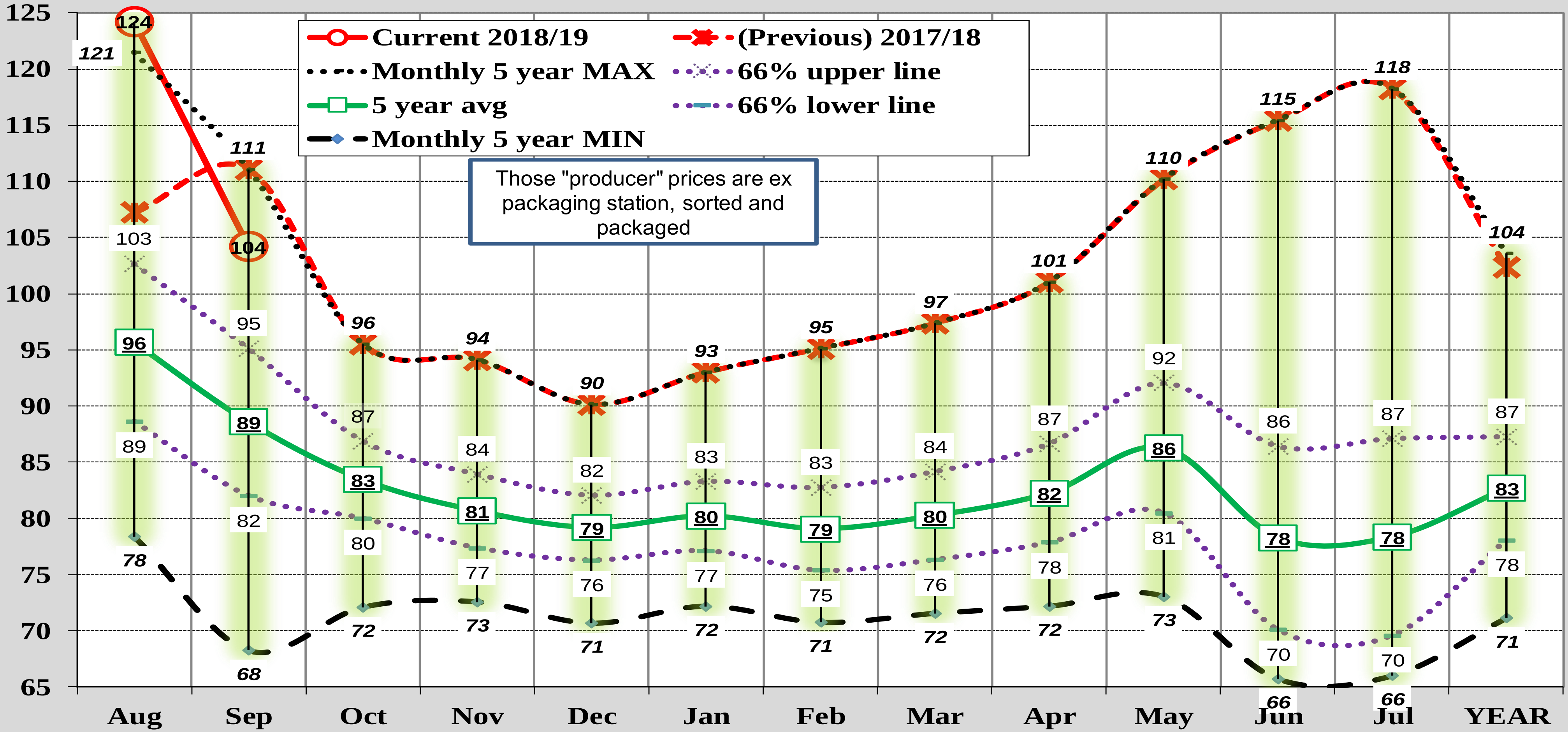
€/100 kg

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



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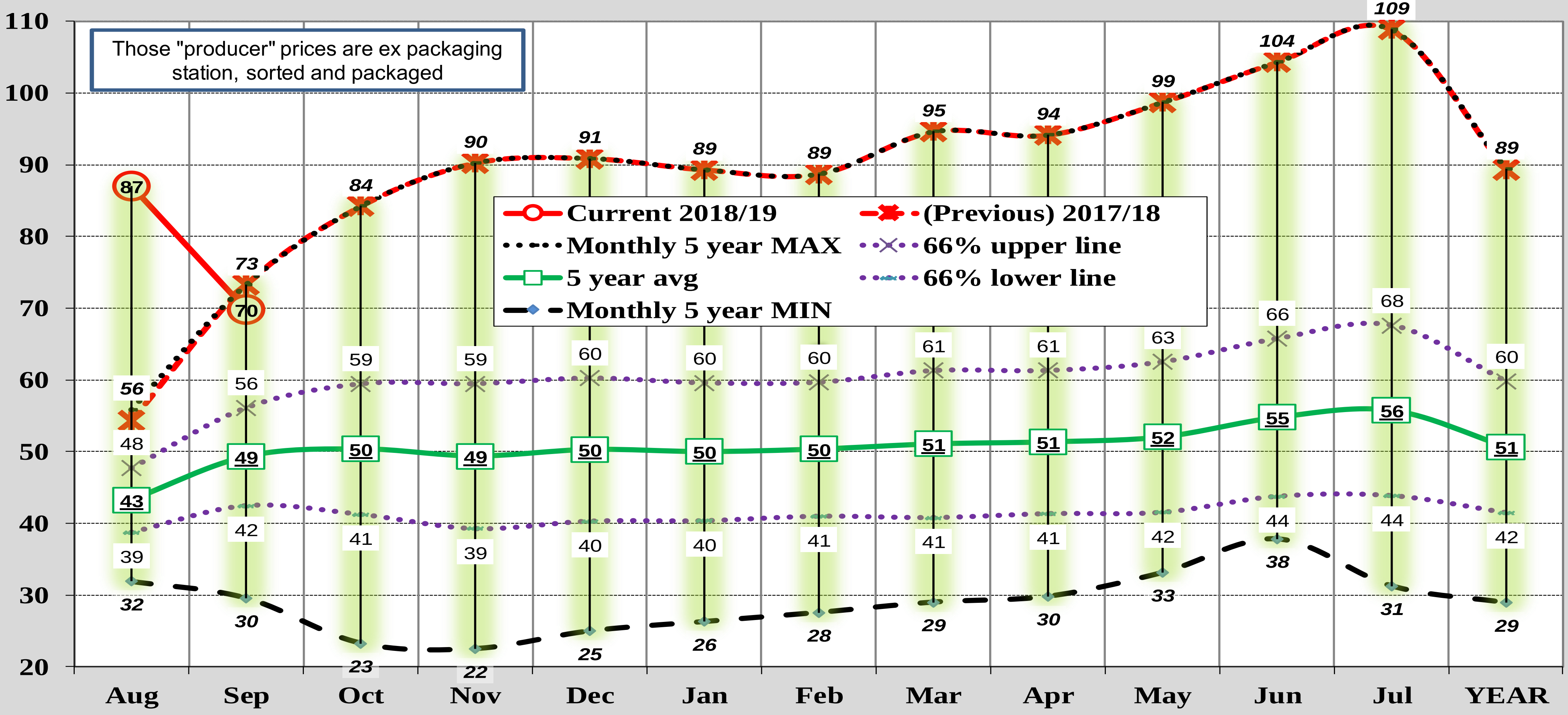
Apple prices in Germany (€/100kg=Euro cents/kg)

€/100 kg



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2. PRODUCTION

2.1. EU production for MSs that are major producers

2.2. EU production by variety (%)

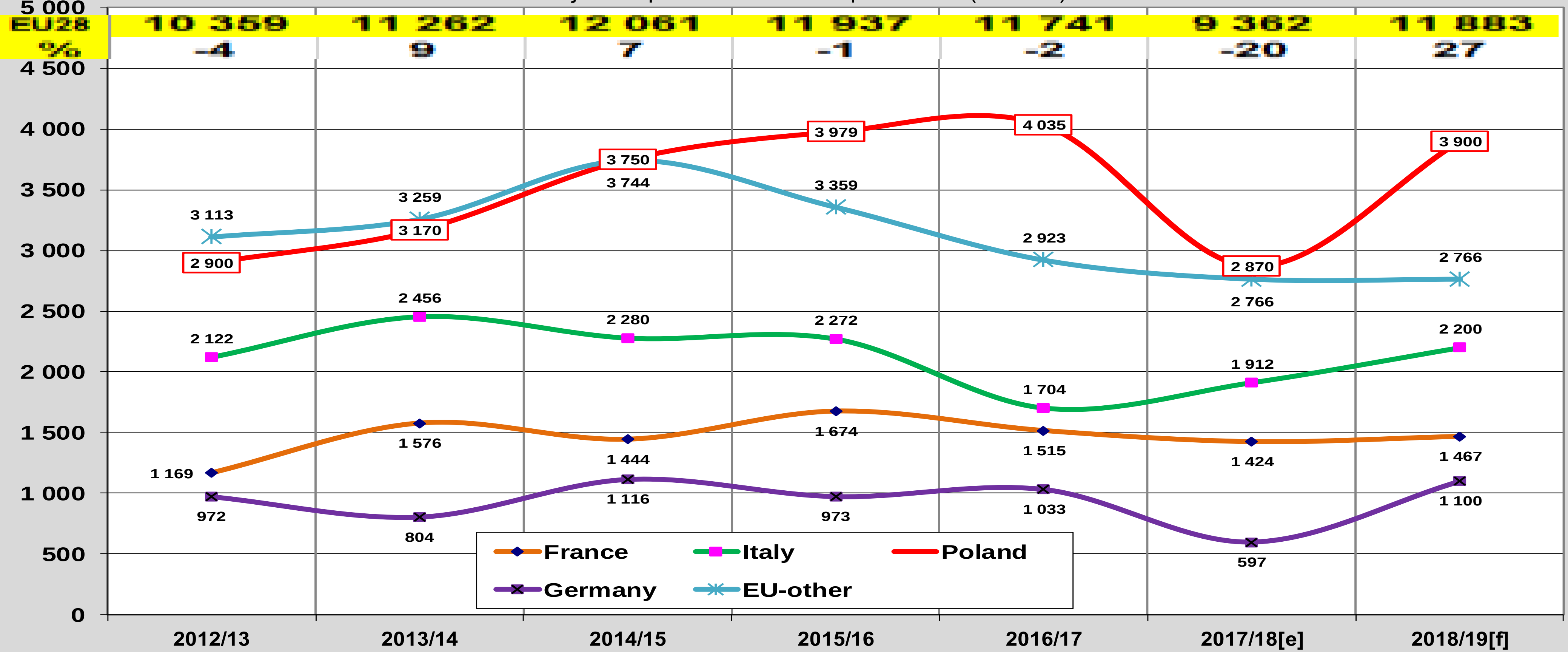
2.3. Extreme weather events

2.4. Apple stocks

European Commission

EU apples supply (usable production), cider apples included (000 tonnes)

The 4 major EU producers + other producers (24 MSs)



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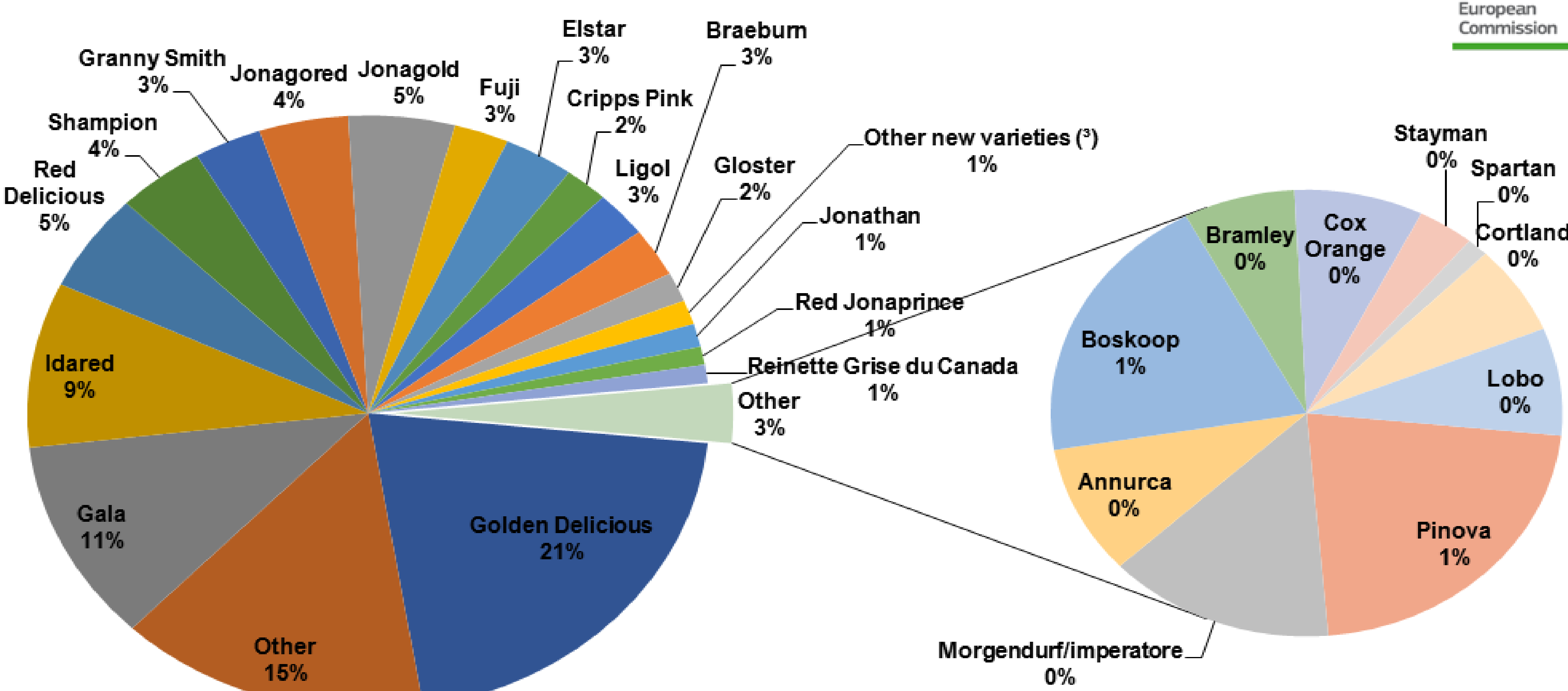
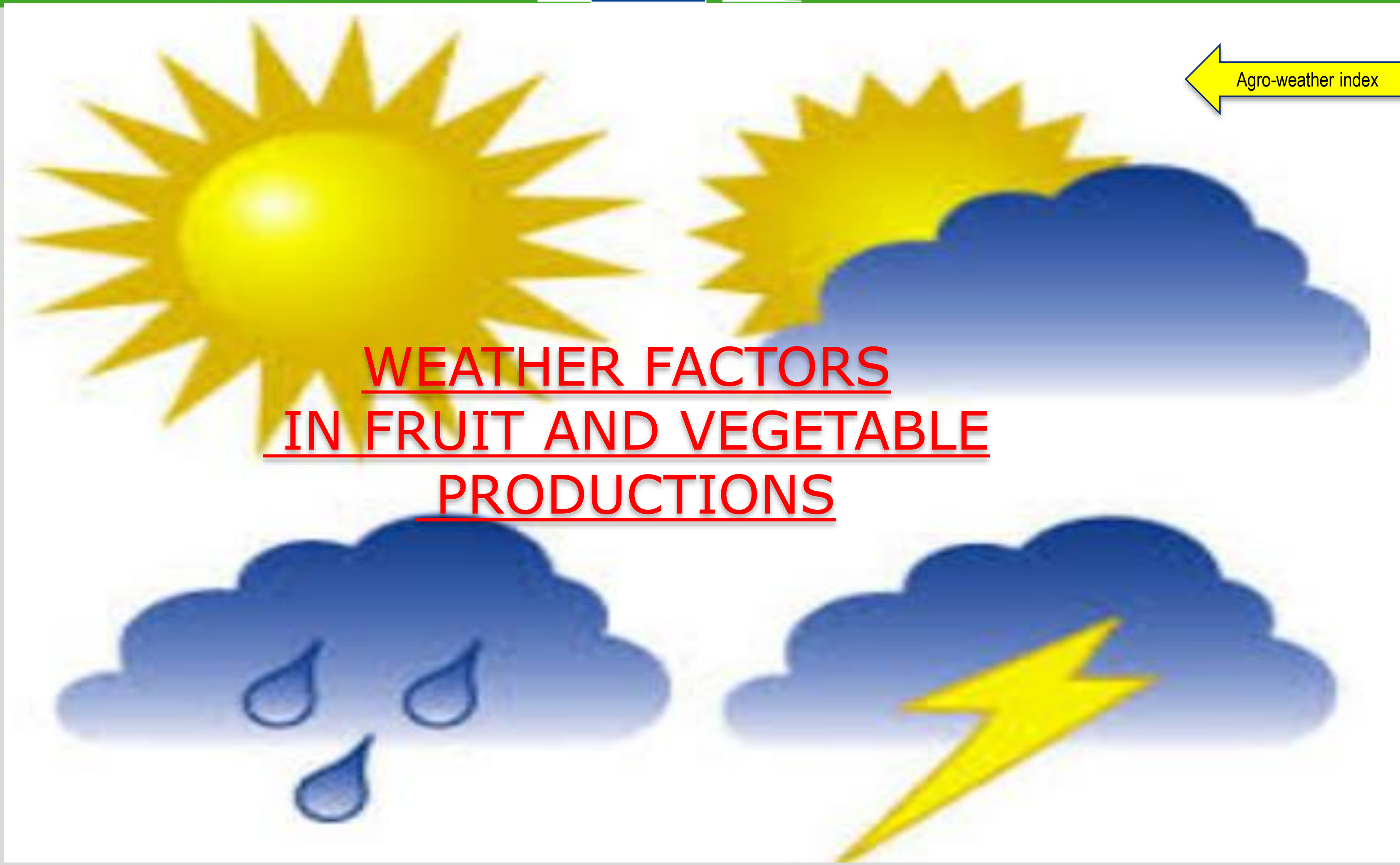
Agriculture and Rural Development

Apple varieties in the EU - 2014/15 to 2016/17

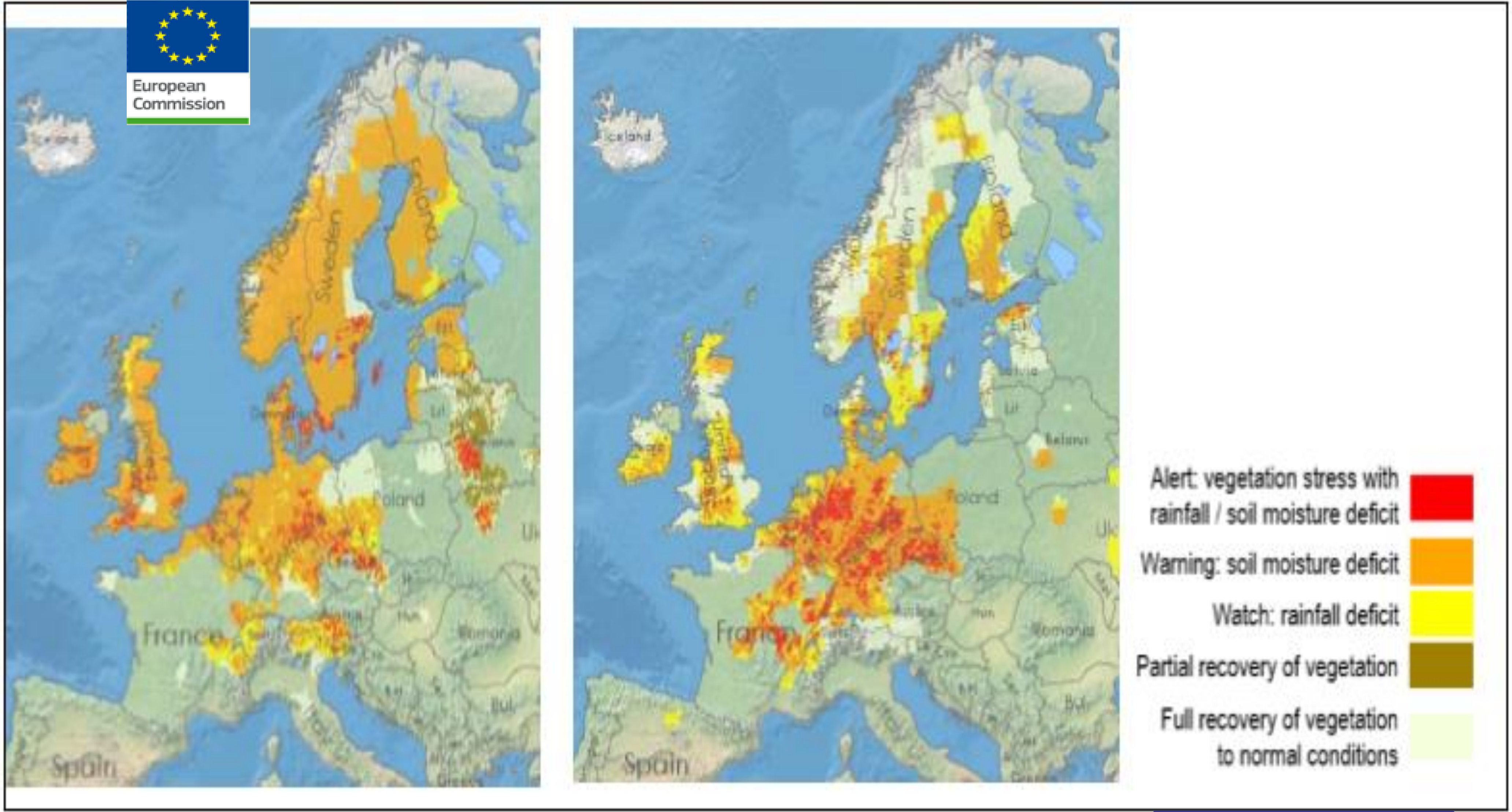


Data source: WAPA

(3) Other new varieties: Ariane, Belgica, Cameo, Diwa, Greenstar, Honey Crunch, Jazz, Junami, Kanzi, Mariac, Rubens, Tentation, Wellant,...



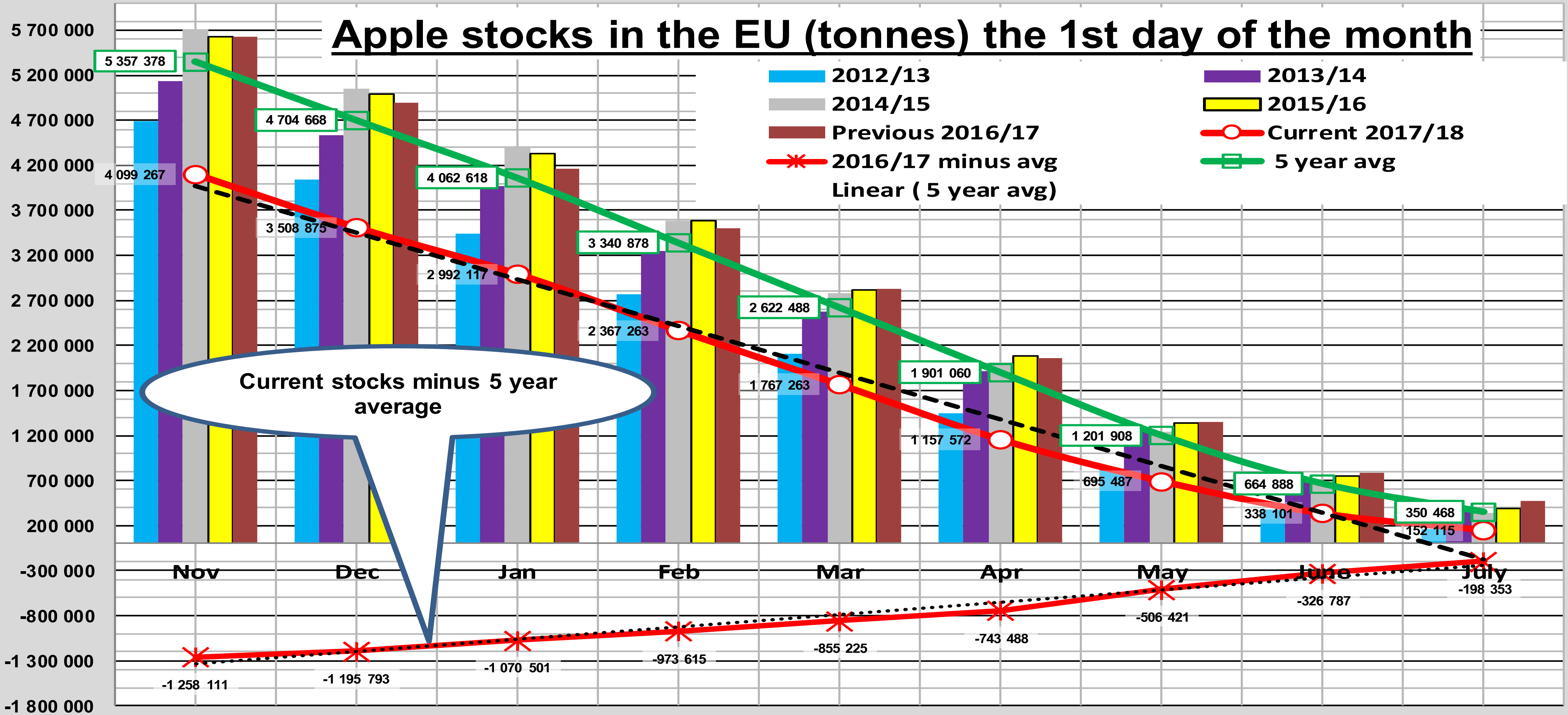
WEATHER FACTORS IN FRUIT AND VEGETABLE PRODUCTIONS



*21st to 31st of **July** 2018*

*11th to 21st of **September** 2018*

Source: JRC



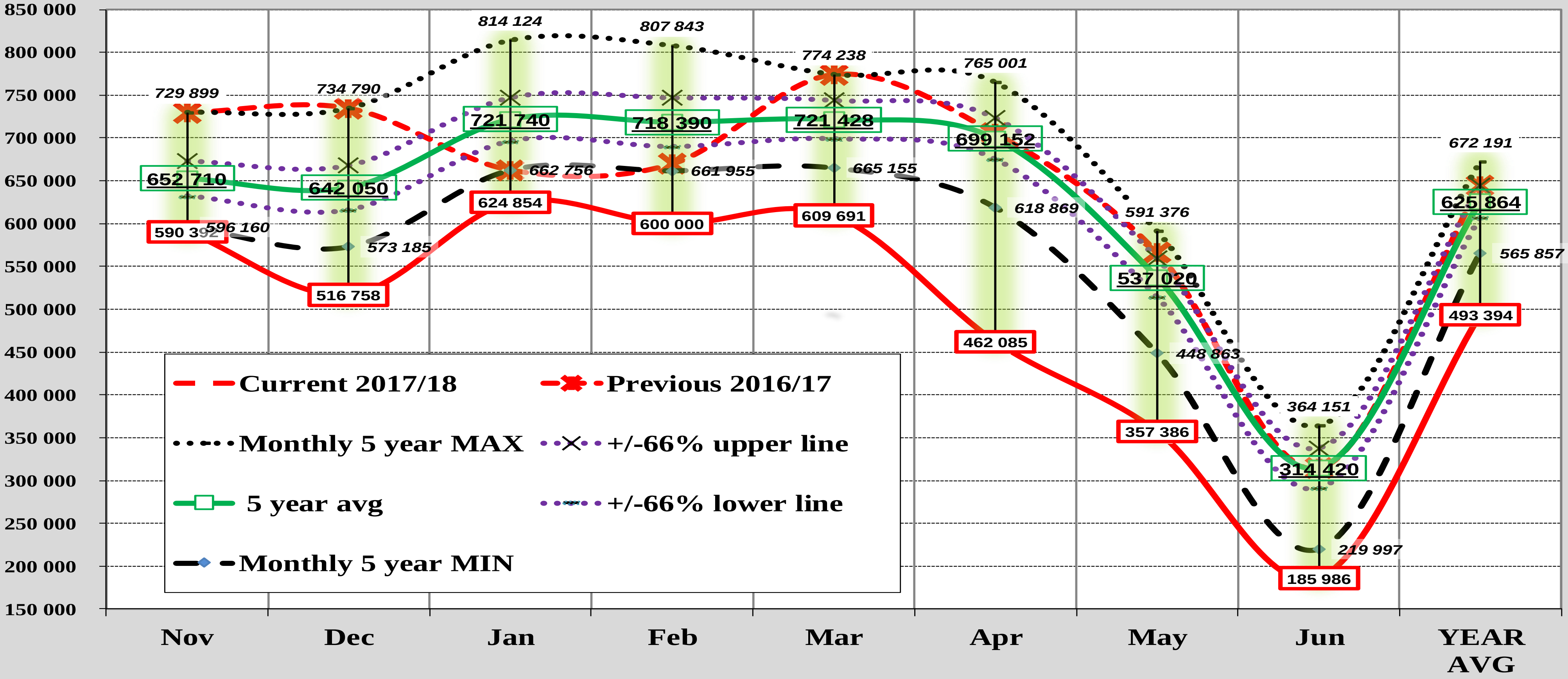
Data sources: WAPA&AMI

Further detail

Agriculture and Rural Development

Apples - Monthly unstocking rates in the EU - tonnes

tonnes



Agriculture and Rural Development

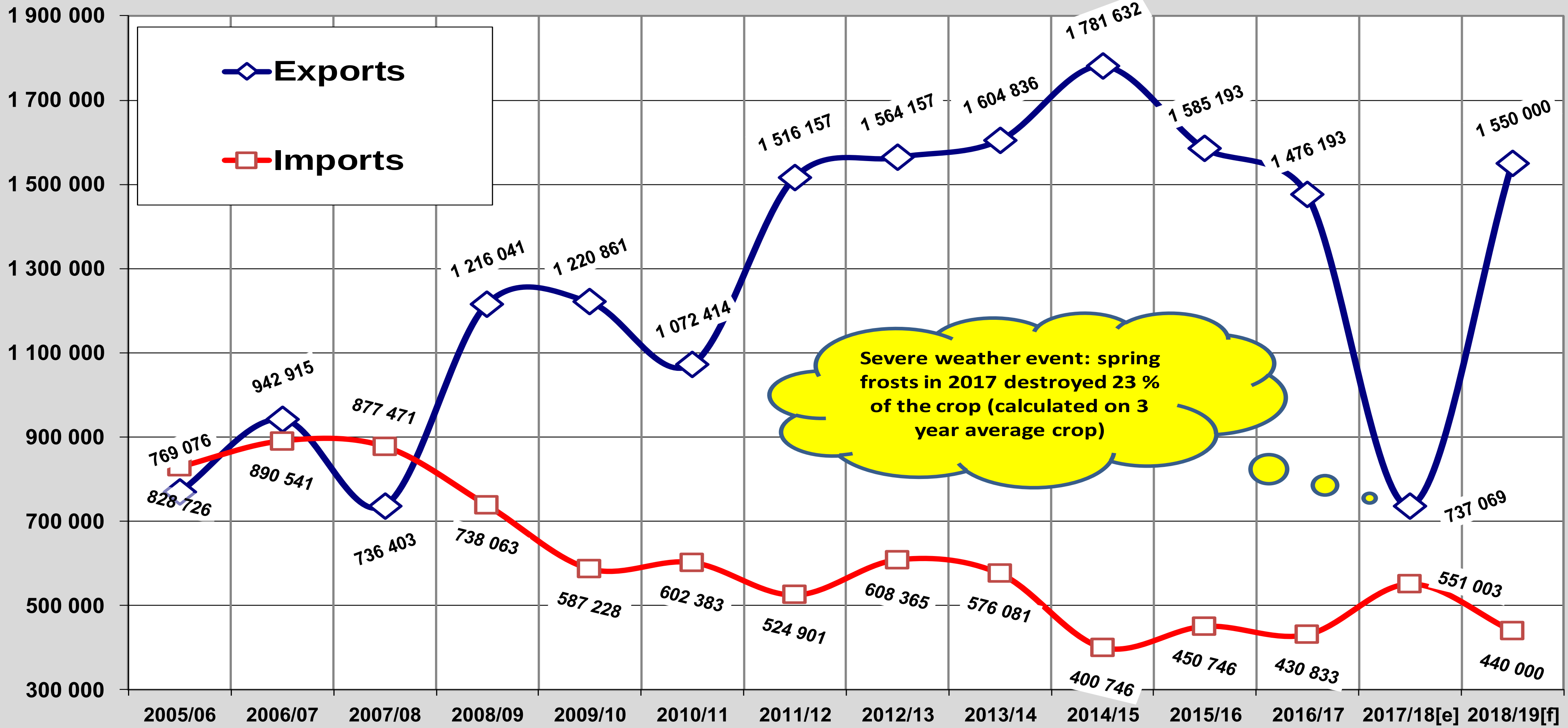
3. TRADE

3.1. Evolution of the trade balance

3.2. Import monitoring

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

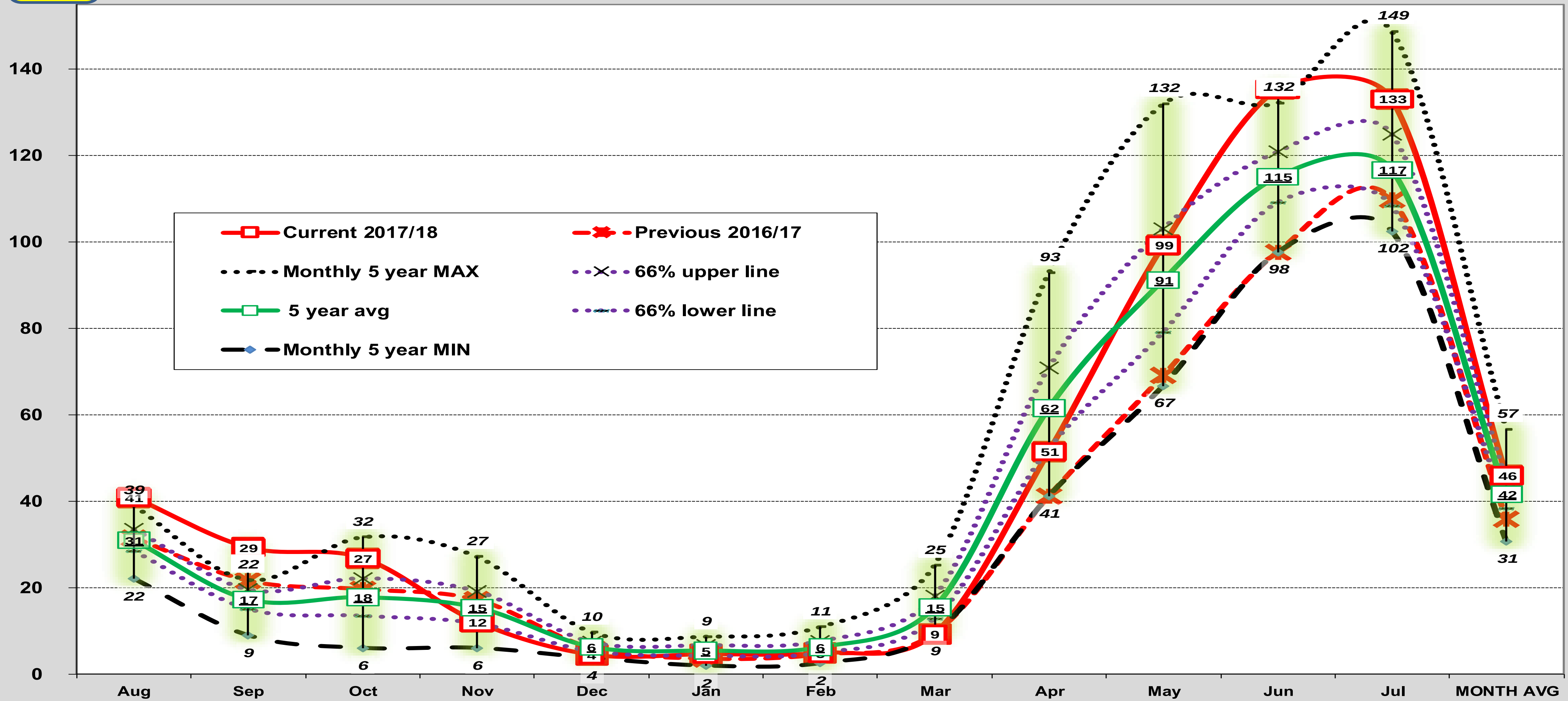
ExtraEU trade for apples - Aug to Jul - Tonnes



Agriculture and Rural Development

000 tonnes

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



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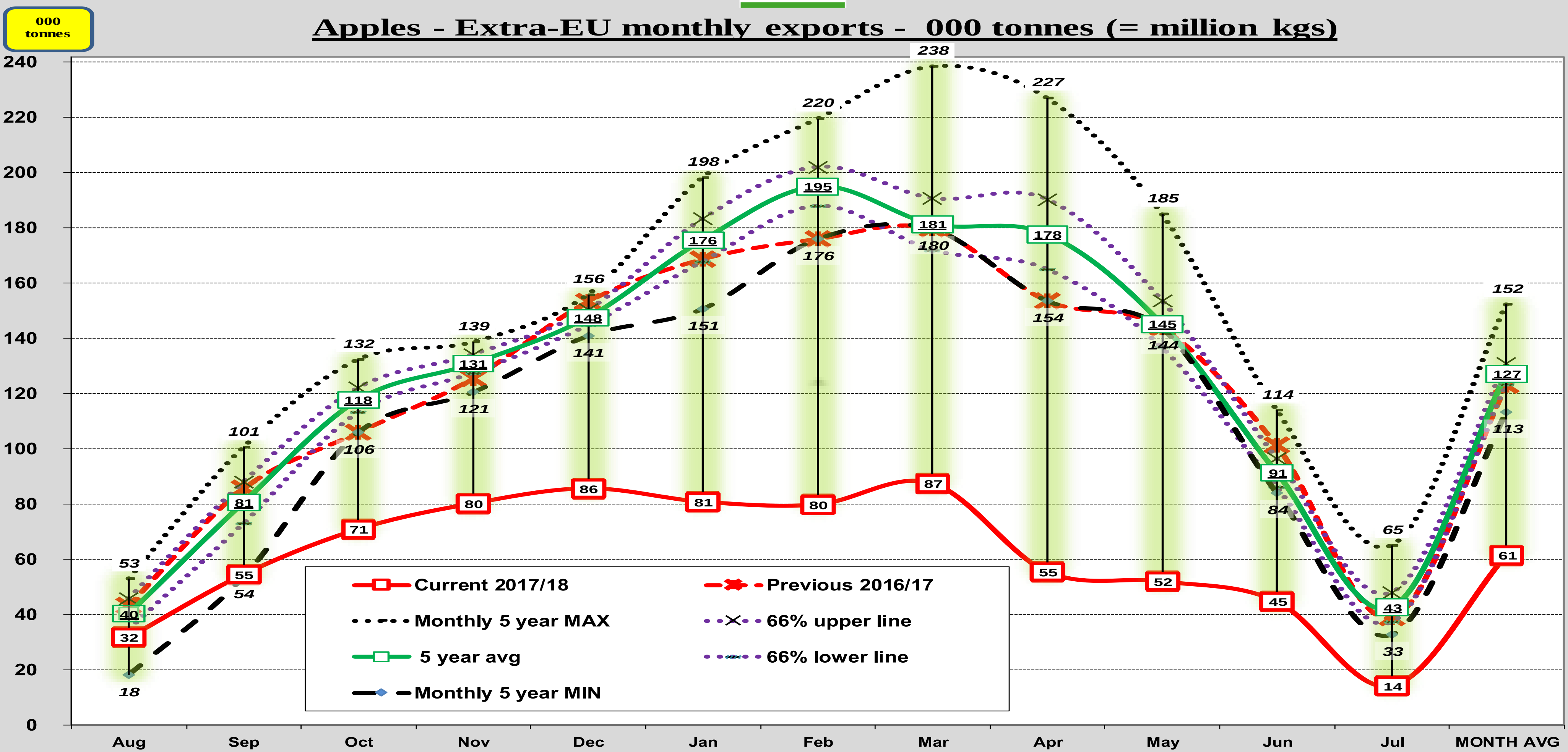

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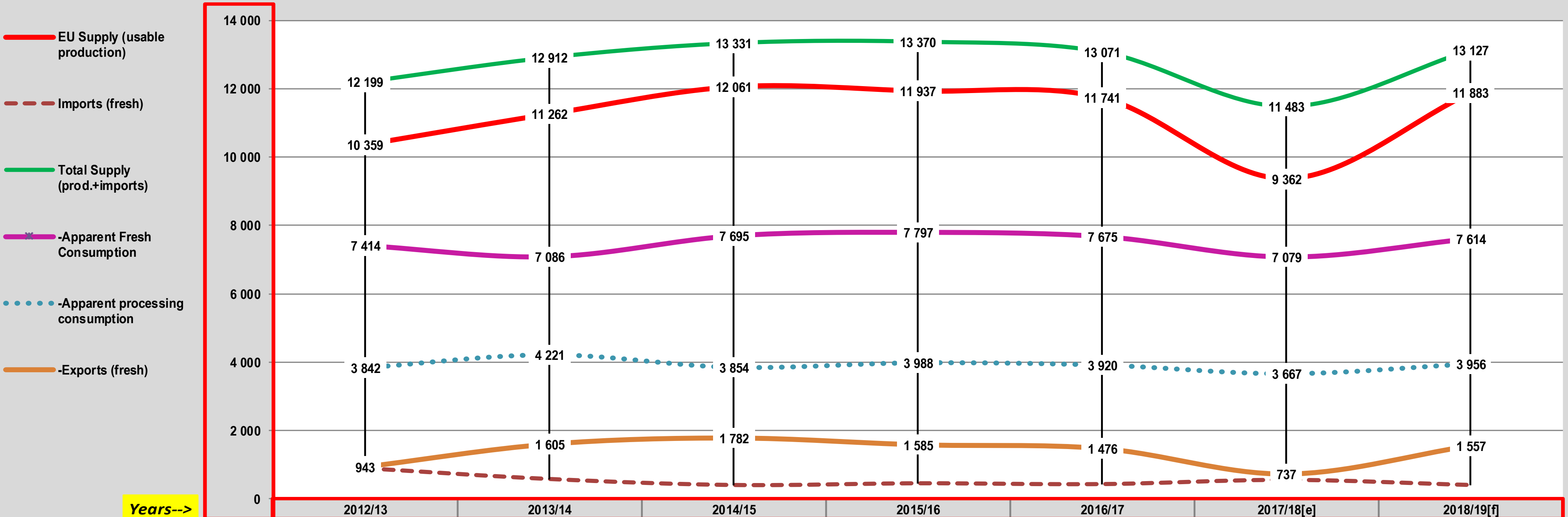
4. KEY BALANCE INDICATORS

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



	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18[e]	2018/19[f]
EU Supply (usable production)	10 359	11 262	12 061	11 937	11 741	9 362	11 883
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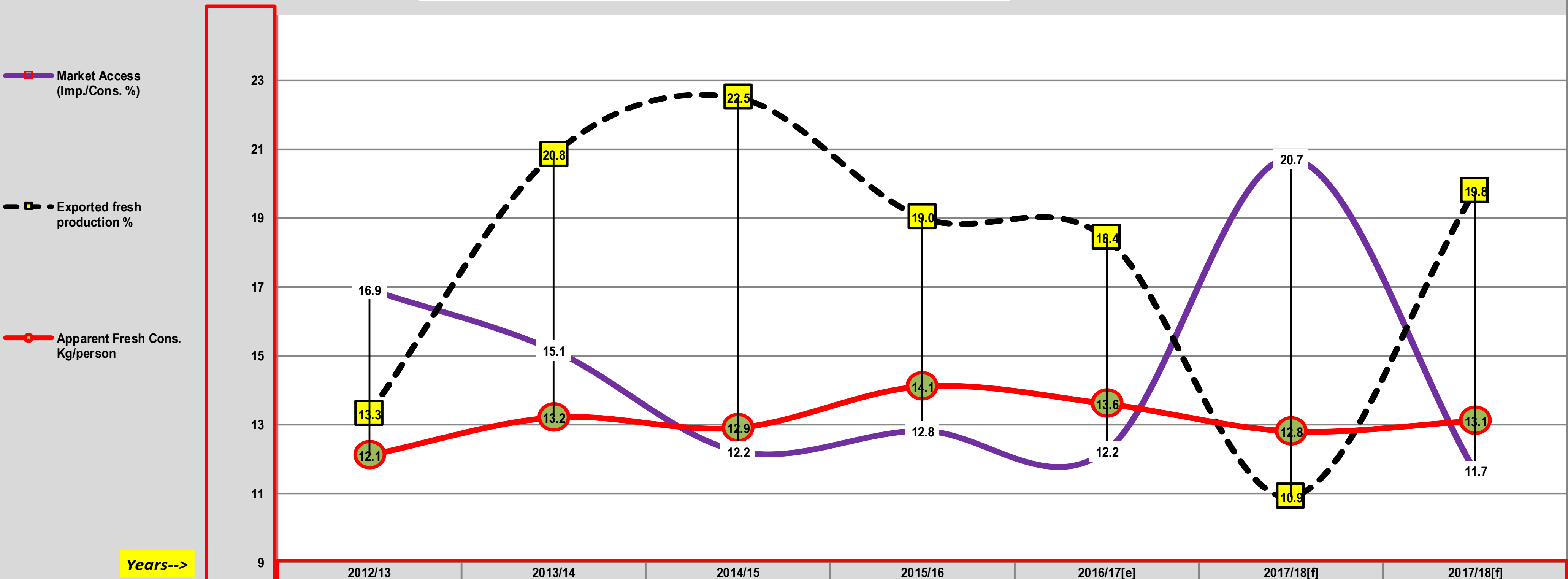
-Exports (fresh)	943	1 605	1 782	1 585	1 476	737	1 557

Apples - key balance indicators including consumption (+)

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

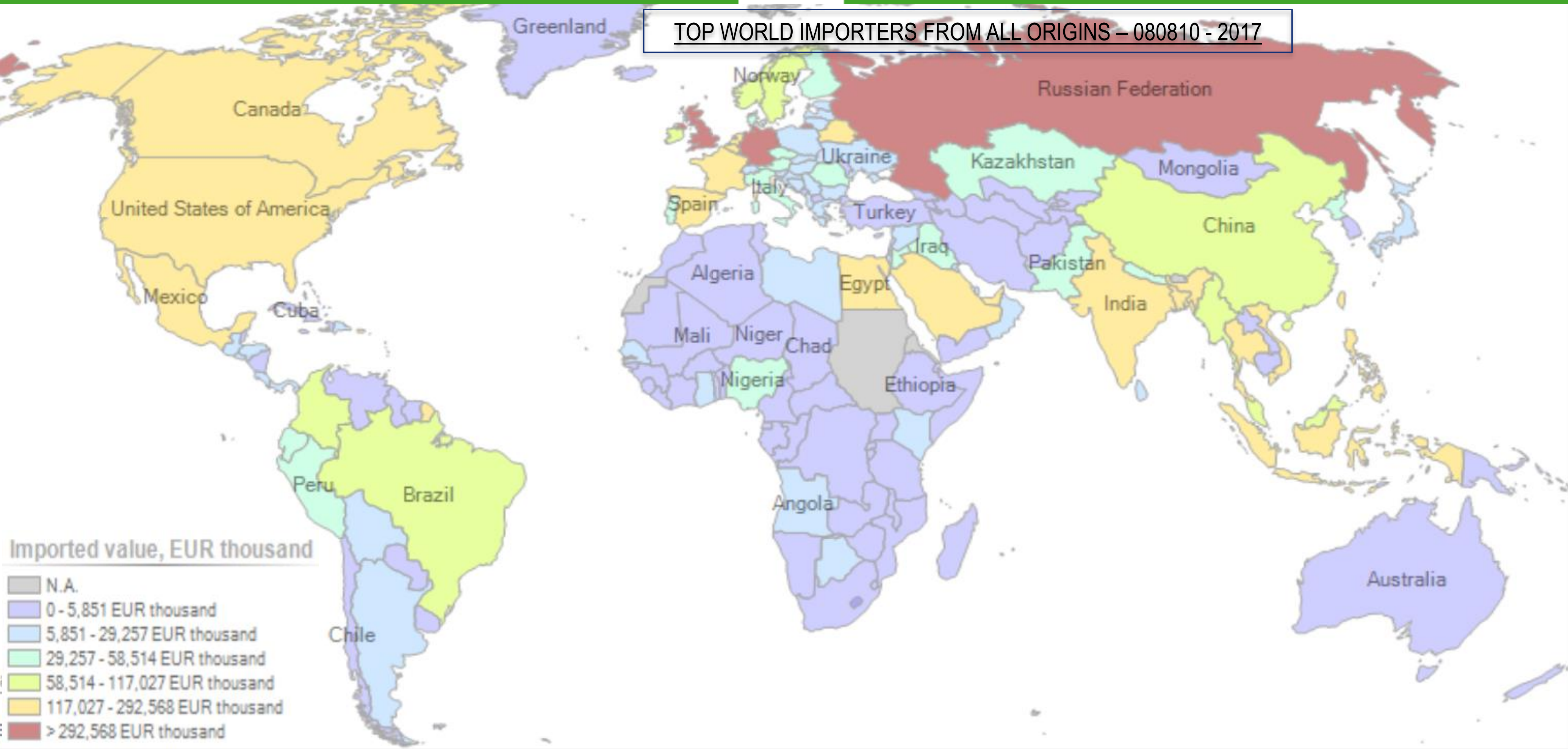


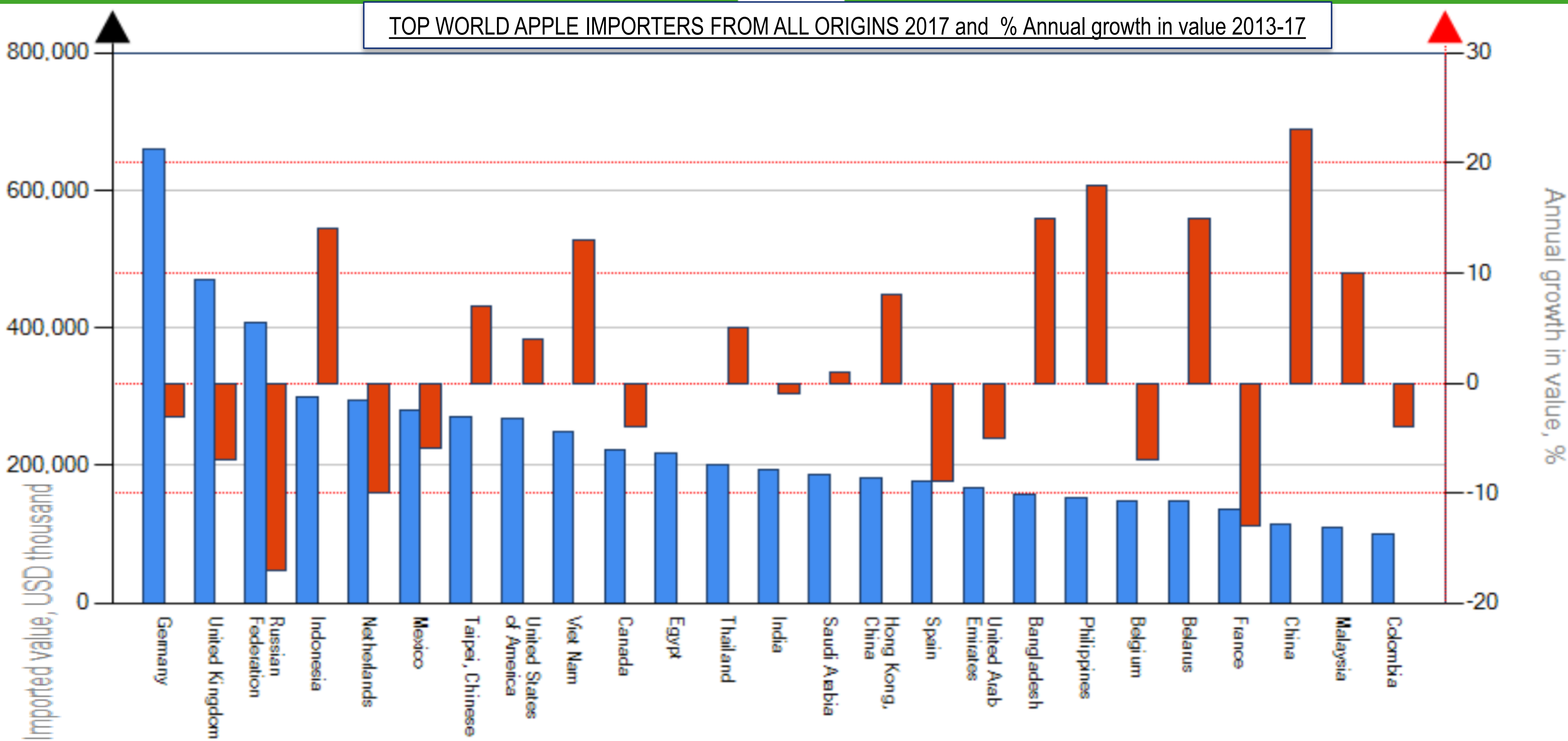
	2012/13	2013/14	2014/15	2015/16	2016/17[e]	2017/18[f]	2017/18[f]
Market Access (Imp./Cons. %)	16.9	15.1	12.2	12.8	12.2	20.7	11.7
Exported fresh production %	13.3	20.8	22.5	19.0	18.4	10.9	19.8
Apparent Fresh Cons. Kg/person	12.1	13.2	12.9	14.1	13.6	12.8	13.1

5. EXPORT DIVERSIFICATION

- 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 – 080810 - 2017

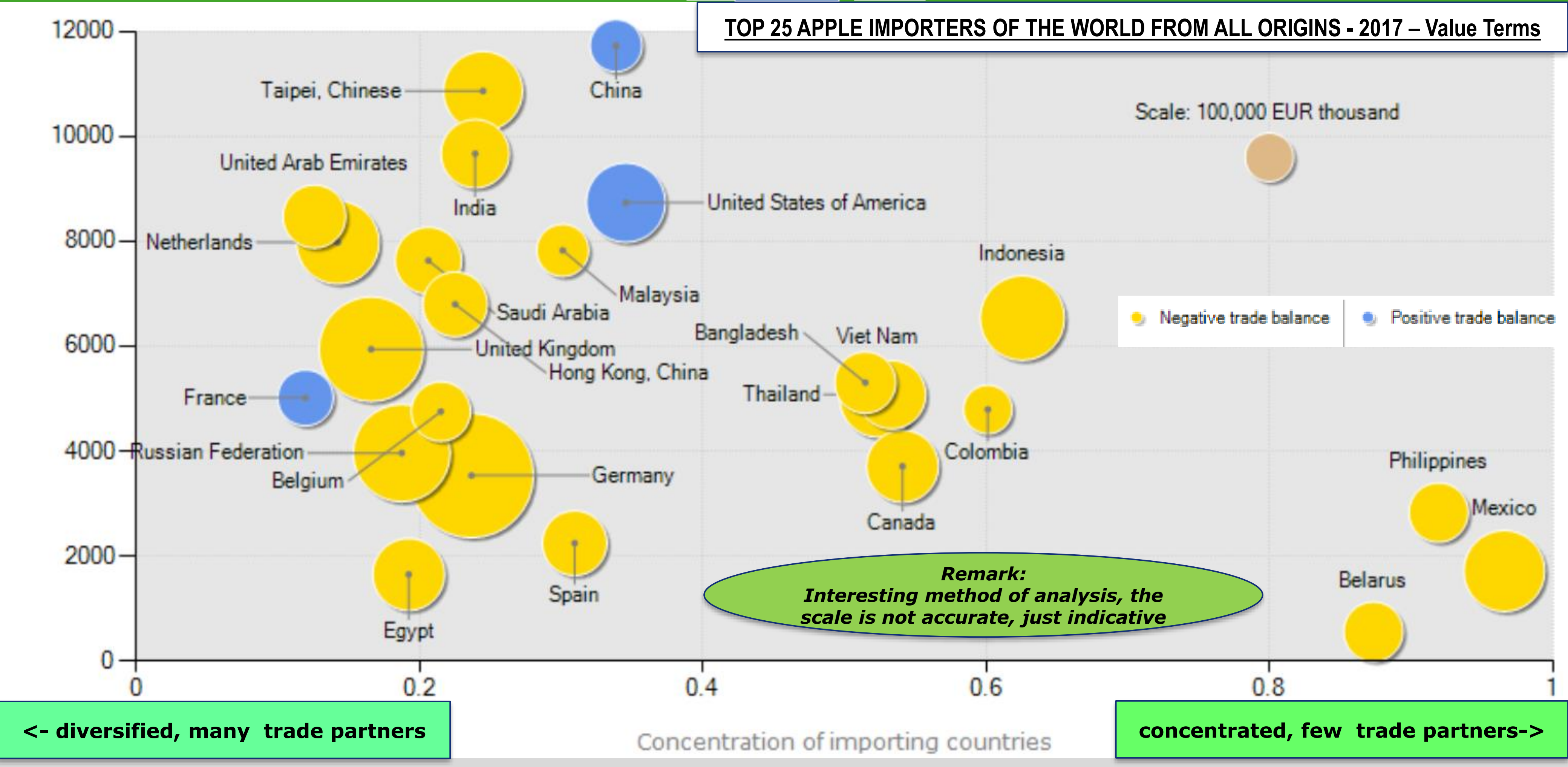




Further detail

TOP WORLD APPLE IMPORTERS FROM ALL ORIGINS - 080810

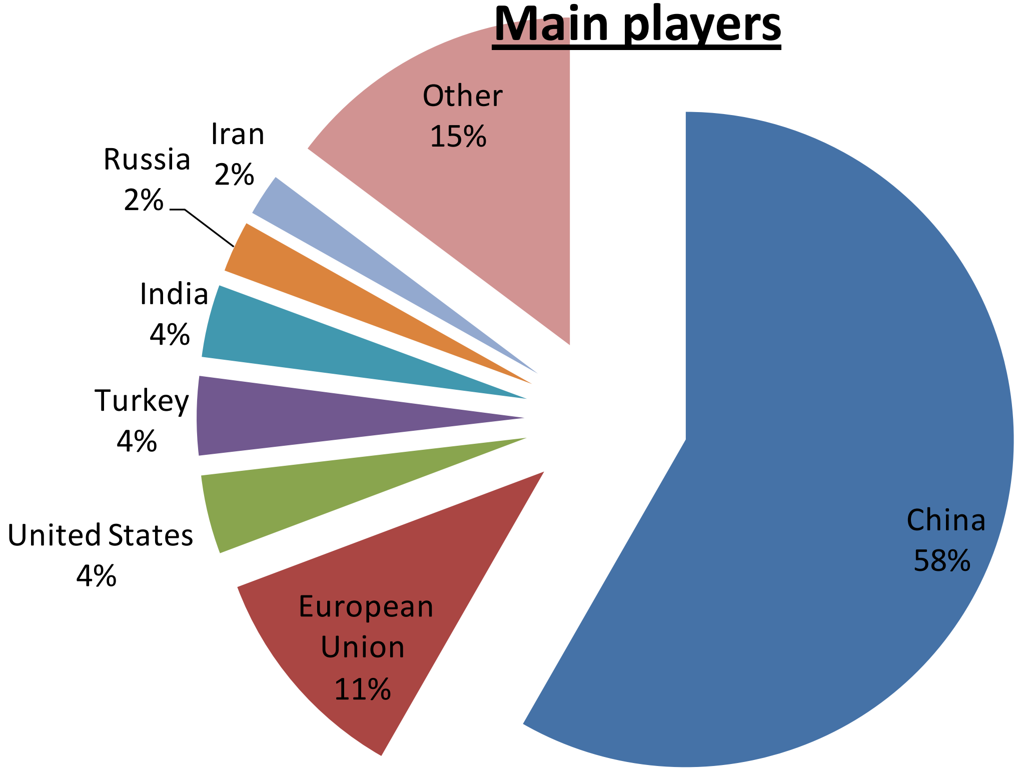
Importers	Value imported in 2017 (USD thousand)	Trade balance in 2017 (USD thousand)	Quantity imported in 2017	Quantity Unit	Unit value (USD/unit)	Annual growth in value between 2013-2017 (%)	Annual growth in quantity between 2013-2017 (%)	Share in world imports (%)	Average distance of supplying countries (km)	Concentration of supplying countries	Average tariff (estimated) applied by the country (%)	Ease of doing business ranking	Number of non-tariff requirements applied by the country	Estimation of untapped potential trade, USD thousand
World	7,836,601	-391,904	8,604,881	Tons	911	-1	-13	100	4,904	0.09				
Germany	661,026	-588,597	756,702	Tons	874	-3	1	8.4	3,533	0.24	3.3	17	20	529,672
United Kingdom	470,743	-450,514	396,229	Tons	1,188	-7	-5	6	5,942	0.17	3.3	7	20	551,938
Russian Federation	406,631	-399,864	705,553	Tons	576	-17	-16	5.2	3,963	0.19	4.3	40	21	573,840
Indonesia	299,806	-299,806	169,055	Tons	1,773	14	5	3.8	6,536	0.63	4.7	91		232,260
Netherlands	295,700	-9,486	249,532	Tons	1,185	-10	-8	3.8	7,978	0.14	3.3	28	20	298,522
Mexico	281,367	-280,508	280,930	Tons	1,002	-6	-1	3.6	1,713	0.97	19.2	47	6	286,839
Taipei, Chinese	270,434	-270,377	167,402	Tons	1,615	7	4	3.5	10,864	0.24	25.7	11		239,648
United States of America	268,084	707,161	165,174	Tons	1,623	4	-1	3.4	8,736	0.35	0	8		240,323
Viet Nam	248,508	-248,388	155,308	Tons	1,600	13	9	3.2	5,003	0.52	10.6	82		108,713
Canada	222,836	-182,679	217,739	Tons	1,023	-4	-1	2.8	3,710	0.54	2	22		190,377
Egypt	218,363	-215,399	210,812	Tons	1,036	0	-36	2.8	1,648	0.19	30.2	122	20	300,944
Thailand	201,795	-197,649	161,638	Tons	1,248	5	6	2.6	5,076	0.53	7.4	46		208,543
India	194,845	-189,330	204,323	Tons	954	-1	3	2.5	9,670	0.24	48.5	130	26	338,442
Saudi Arabia	185,595	-182,303	184,974	Tons	1,003	1	1	2.4	7,632	0.21	0	94	29	211,494
Hong Kong, China	182,040	-122,993	165,089	Tons	1,103	8	11	2.3	6,798	0.22	0	4	10	135,895
Spain	177,339	-79,246	205,516	Tons	863	-9	-3	2.3	2,244	0.31	3.3	32	20	178,247
United Arab Emirates	166,682	-155,513	156,842	Tons	1,063	-5	-3	2.1	8,472	0.13	0	26	26	260,857
Bangladesh	158,568	-158,479	234,343	Tons	677	15	16	2	5,306	0.51	25	176		152,752
Philippines	152,630	-152,630	147,258	Tons	1,036	18	21	1.9	2,827	0.92	6.6	99	28	154,039
Belgium	149,036	-17,672	152,448	Tons	978	-7	-2	1.9	4,754	0.21	3.3	42	20	139,568
Belarus	147,908	-140,383	476,234	Tons	311	15	28	1.9	557	0.87	4.5	37		94,889
France	135,503	455,939	169,471	Tons	800	-13	-7	1.7	5,014	0.12	3.3	29	20	165,256
China	115,193	1,341,644	68,850	Tons	1,673	23	22	1.5	11,730	0.34	17.6	78	14	101,936
Malaysia	111,024	-109,836	105,322	Tons	1,054	10	2	1.4	7,826	0.3	4.7	23		148,327



Further detail

Agriculture and Rural Development

World consumption of apples 2015/16 (volume)
Main players



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Thank you