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Global Agricultural Information Network

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Fresh Deciduous Fruit Annual

2018

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Report Highlights:

In Marketing Year 2018/19, apple, pear, and table grape production in the European Union is forecast to be significantly up after low production in the previous year. Expectations for apple production are for a 34 percent increase compared to the frost-stricken previous year, which would represent the largest production ever recorded in the EU. The forecast for pear production is up four percent while the increase for table grapes is forecast at eleven percent. As a result of the high domestic supply, imports of apples and pears are expected to decline, whereas exports are forecast to increase.

This report covers the commodities:

Apples, Fresh

Pears, Fresh

Table Grapes, Fresh

Disclaimer: This report presents the situation and outlook for apples, pears, and table grapes in the EU-28. This report presents the views of the authors and does not reflect the official views of the U.S. Department of Agriculture (USDA). The data are not official USDA data.

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APHIS	Animal and Plant Health Inspection Service
CAJ	Concentrated Apple Juice
CAP	Common Agricultural Policy
CMO	Common Market Organization
DG	Directorate General
DPA	Diphenylamine
e	Estimate
EU	European Union
EE	Eastern European
EFSA	European Food Safety Authority
EPS	Entry Price System
FAS	Foreign Agricultural Service
GTA	Global Trade Atlas
Ha	Hectare; 1 ha = 2.471 Acres
HS	Harmonized Commodity Description and Coding System
MT	Metric Ton = 1000 kg
MMT	Million Metric Tons
MRLs	Maximum Residue Levels
MS	EU Member State(s)
MY	Marketing year
Apples:	July/June
Pears:	July/June
Table Grapes:	June/May
NEF	National Framework for Environmental Action
OP	Operational Program
PO	Producer Organization
PPPs	Plant Protection Products
PSD	Production, supply and demand
R	revised
RMS	Rapporteur Member State
RO	Reasoned Opinion by EFSA
SFS	School Fruit Scheme
UAE	United Arab Emirates
U.K.	United Kingdom
U.S.	United States
USD	U.S. Dollar
USDA	United States Department of Agriculture
USEU	U.S. Mission to the European Union
WAPA	World Apple and Pear Association

Trade data cited in this report was derived by using the following Harmonized Commodity Description and Coding System (HS) tariff codes:

Apples:	0808 10
Pears:	Until 12/31/2011: 0808 20 (pears and quinces); as of 01/01/2012: 0808 30 (pears)
Table grapes:	0806 10

Policy

Coordinated by Tania De Belder/USEU/FAS Brussels

Fresh deciduous fruit falls under the European Union (EU) fruit and vegetables regime and is part of the Common Agriculture Policy (CAP). The following sections explain the main elements of the EU fruit and vegetables policy that refer to the fresh deciduous fruit sector. The second part explains the EU measures that were taken in response to the Russian embargo. The third part lists the upcoming Maximum Residue Levels (MRL) reviews under Article 12 of Regulation 396/2005.

I. EU Policy Related to Fresh Deciduous Fruit

1. The Common Agriculture Policy

[Regulation \(EU\) No 1308/2013](#) outlines a framework for market measures under the CAP by the single Common Market Organization (CMO) and it entered into force on January 1, 2014. The CAP 2020 reform consists of four [basic regulations](#), supplemented by delegated acts, and amends the implementing rules for the fresh and processed fruit and vegetables sectors ([Commission implementing Regulation \(EU\) No 543/2011](#)).

On June 1, 2017, [Commission Delegated Regulation 2017/891](#) entered into force and amended regulation 543/2011. The new framework seeks to make Producer Organizations (POs) more attractive to non-members and provide greater clarity about what actions are eligible for EU funding. The framework seeks to set the maximum percentage of produce that can be marketed outside the organization to 25 percent in order to create shorter supply chains where producers can sell directly to consumers. It also simplifies and clarifies legislation with regard to payments to transnational POs and their associations. In addition, it increases the support for withdrawals for fruit and vegetable from the market POs.

These market measures under the CAP aim to:

a) Create a more competitive and market-oriented sector

The POs are still the key elements in the EU's CMO for fruit and vegetables. POs are legal entities established by producers to market commodities, including fresh deciduous fruit. These POs are eligible to receive EU subsidies instead of individual producers. In order to qualify for EU subsidies, a PO must submit an operational program financed through an operational fund and directly receives the EU's financial contribution. The basis for the calculation of the estimated amount of the operational fund is the operational program and the value of the marketed production. The approval of operational programs happens under Regulation (EU) No 1308/2013.

Fresh fruit and vegetable imports into the EU have to comply with EU-harmonized marketing standards. These standards apply at all marketing stages and include criteria such as quality, size, labeling, packaging, and presentation. Commission implementing Regulation (EU) No 543/2011 provides for a general marketing standard for all fresh fruits and vegetables. Specific marketing standards are still in place for ten products, including apples and pears, and are set out in Part B of Annex I to this Regulation: for apples in Part 1 of that same section on page 95 and for pears in Part 6 on page 129.

b) Diminish crisis-related fluctuations in producers' income

To achieve this objective, the EU offers funding under the operational programs for:

- Product withdrawal
- Green harvesting/non-harvesting;
- Promotion/communication tools;
- Training measures;
- Harvest insurance;
- Assistance to secure bank loans, and support for administrative costs associated with setting up mutual funds.

In their national strategies, the national authorities must determine which of these instruments can receive funds in their respective countries. The POs may take out loans on commercial terms to finance crisis prevention and management measures. The repayment of the capital and the interest on those loans may be eligible for financial assistance under the operational programs of POs.

c) Encourage increased consumption of fruit and vegetables in the EU

The European “School Fruit Scheme” originated in 2009 as a measure to combat child obesity and includes three elements: free distribution of fruit and vegetables in schools, informational campaigns on healthy eating habits, and monitoring and evaluation. As in previous years, the EU funds of \$164 million (€150 million) were allocated in the school year 2017/2018 to all of the [Member States](#) (MS).

[Commission Implementing Decision C\(2018\) 1762](#) on the new School Scheme for Milk, Fruit and Vegetables applies since August 1, 2018.

The sector may also benefit from the European [promotion](#) budget for agricultural products and [quality schemes](#). The Commission reformed its promotion policy with an extension of the product scope and a greater focus on export markets. The current promotion budget of \$76 million (€60 million) will increase annually until it reaches \$255 million (€200 million) in 2020. There will no longer be a need for national co-funding; EU associations will be able to apply directly for a program.

d) Increase the use of environmentally friendly cultivation and production techniques

At least ten percent of operational program funding must be spent on environmental actions that go beyond mandatory environmental standards. The EU member states with recognized POs must draw up a National Framework for Environmental Action (NEF) as part of their “national strategy for sustainable operational program.” The NEF must contain a non-exhaustive list of environmental actions and the conditions applicable to them in the concerned MS.

CAP after 2020

On 1 June 2018, the European Commission presented legislative proposals on the CAP beyond 2020. The aim of the new proposals is to better respond to current and future challenges such as climate change. The CAP will continue to support European farmers, but the overall budget is lower compared to the previous period. For information on the CAP after 2020, please see:

https://ec.europa.eu/info/food-farming-fisheries/key-policies/common-agricultural-policy/future-cap_en

2. Certification of Fruit Shipments

Fruit, vegetable, and nut shipments exported to the EU require a phytosanitary certificate. A USDA/Animal Plant Health Inspection Service (APHIS) inspector issues these certificates in accordance with international regulations established by the [International Plant Protection Convention of the Food and Agriculture Organization of the United Nations](#). This standard-setting body coordinates cooperation between nations to control plant and plant product pests and to prevent their spread.

[Council Directive 2000/29/EC](#) contains provisions concerning compulsory plant health checks. This includes documentary, identity, and physical plant health checks to verify compliance with EU import requirements. There is more information available on the DG Health and Food Safety (DG SANTE) website: http://ec.europa.eu/food/plant/plant_health_biosecurity/non_eu_trade/index_en.htm

[Commission Regulation 1756/2004](#) provides for a possibility to carry out plant health checks at reduced frequency when justified. The European Commission published the updated list of products on [January 1, 2018](#). The Commission monitors imports of fruit and vegetables on an annual basis to determine how to adjust the frequency of testing consignments.

3. Maximum Residue Levels for Fruit

Maximum Residue Levels (MRLs) for pesticides, including import tolerances, have been harmonized throughout the EU since September 2008. As a marketing tool, some retail chains in the EU adopt private standards that exceed EU regulations by requiring their suppliers to adhere to stricter company policies that limit the maximum residues to 30, 50, or 70 percent of the respective EU MRL. Please find the link to the [EU MRL database](#), as well as to the [global MRL database](#) for MRLs worldwide.

Note: Diphenylamine (DPA) is a pesticide used on apples and pears to prevent scalding but is no longer authorized for use in the EU. Subsequently, the MRLs for DPA decreased to 0.1 mg/kg for both apples and pears on March 2, 2014. Since then, the volumes of apples exported to the EU have decreased substantially. Only a few shippers exporting to Europe have designated special DPA-free facilities to stay below the currently allowed levels.

4. Tariffs

EU imports of fresh fruit and vegetables are subject to the Entry Price System, which has been in place in its current form since the Uruguay Round. It is a complex tariff system, which provides a high level of protection to EU producers. In this system, fruits and vegetables imported at or above an established entry price are charged an ad valorem duty only. Produce valued below the entry price are charged a tariff equivalent in addition to the ad valorem duty. The tariff equivalent is graduated for products valued between 92 and 100 percent of the entry price. The ad valorem duty and the full tariff equivalent are levied on imports valued at less than 92 percent of the entry price.

[Commission Implementing Regulation 2017/1925](#) published the tariff levels for 2018.

Apples see pages 97 and 687-689

Pears see pages 97 and 689-691

CAJ see pages 168 and 888

Grapes see pages 96 and 686

II. Russian Ban on Agricultural Products

On August 7, 2014, the Russian government implemented a (then) one-year ban on a range of agricultural and food products, including fresh deciduous fruit, from the United States, the EU, Canada, Australia, and Norway, in response to U.S. and EU sanctions over Russian actions in Ukraine. Rather than allow the ban to expire, Russia opted to extend it; the (current) ban runs until December 31, 2019.

The CMO rules (see Regulation 1308/2013 in part I) provide various market management tools to stabilize markets and the Commission is empowered under the reformed CAP to take "exceptional measures" in case of market disruption. As such, the Commission introduced specific market support measures for the European fruit and vegetable sector since the start of the ban in 2014 until 2017. The last emergency measures for fruit and vegetables were phased out on June 30, 2018. The EU granted \$588 million (€500 million) of aid to EU producers of fruit and vegetables corresponding to 1.7 million tons of withdrawals from the market.

Please find more information on the Commission's response to the Russian ban here:

http://ec.europa.eu/agriculture/russian-import-ban/index_en.htm

III. Upcoming MRL reviews under Article 12 of Regulation 396/2005

Plant protection products (PPPs) along with MRLs and import tolerances are an increasingly important issue in the EU since there is a significant reduction in the number of active substances approved for use. Regulation (EC) No 1107/2009 and Regulation (EC) No 396/2005 regulate PPPs and MRLs, respectively. There is a consistent review of active substances for which the approval is up for renewal, as well as their associated MRLs.

Existing MRLs are also being reviewed through a process known as an Article 12 review. The first list below indicates the upcoming MRL reviews for the main fresh deciduous fruit commodities under this Article 12 process. The second list includes the active substances which are, or will soon be, up for renewal. It is important to note that these lists are not all-inclusive. Due to the complexity of the renewal process and the importance of the issue, **stakeholders are encouraged to actively engage early in these review processes by reaching out to the applicant.** Together with the applicant, they can ensure that the necessary data is available for the review or if trials for data collection are in progress or should be initiated etc, especially if the substance is not used or authorized in the EU. It is highly recommended to contact the assigned "Rapporteur Member State" (RMS) which will carry out the first evaluation of the active substance and existing EU pesticide MRLs. **Stakeholders are encouraged to engage with FAS on substances and MRLs of importance to their commodities.**

1) Article 12 MRL Review

	Apple	Pears	Table Grapes	RMS*	Start of data collection	Adoption of the RO** (expected date)
Pyriofenone			x	UK (LV)	1/15/2018	02/05/2019
Fluopyram	x	x	x	DE (AT)	10/13/2017	01/04/2019
Spinetoram		x	x	UK (HR)	10/15/2018	
Metaflumizone		x	x	UK (SE)	11/15/2018	
Hexythiazox	x	x	x	FI	12/21/2016	10/29/2018
Sodium Hypochlorite	x	x	x	NL (IE)	3/15/2018	02/20/2019
Fenazaquin	x	x		EL (DE)	02/14/2018	02/05/2018
Ametoctradin			x	NL (DE)	5/15/2018	04/23/2019
Imidacloprid	x	x	x	DE	5/2/2016	11/29/2018
Proquinazid			x	UK (SE)	6/15/2018	
Fluxapyroxad		x	x	UK (FR)	6/15/2018	
Cyflufenamid	x	x	x	UK (DE)	6/16/2017	04/10/2018
Myclobutanil			x	BE (AT)	6/23/2017	07/13/2018
Spirotetramat	x	x	x	AT	7/15/2018	
Mandipropamid			x	AT	8/10/2017	04/26/2018
Clethodim	x	x		NL	8/10/2018	12/30/2018
Acequinocyl		x	x	NL (DE)	8/15/2018	
Benalaxyl-M			x	PT	9/15/2017	03/12/2018
Fluopicolide			x	UK (AT)	9/15/2017	09/11/2018
Flubendiamide		x	x	EL	9/15/2018	

*RMS: rapporteur member state

**Expected date of Reasoned Opinion (RO) by the European Food Safety Authority (EFSA)

2) Active Substances up for Review

Last day of application 12/31/2018	RMS / co-RMS
1-Naphthylacetamide (1-NAD)	HU / FR
1-Naphthylacetic acid (1-NAA)	HU / FR
8-Hydroxyquinoline incl. oxyquinoleine	ES / NL
Acrinathrin	FR / ES
Azimsulfuron	EL / FR
Azoxystrobin	UK / NO
Fluazifop-P	FR / IT

Fluquinconazole	UK / SK
Fluroxypyr	SE / SI
Imazalil (aka enilconazole)	NL / BE
Kresoxim-methyl	SE / FR
Oxyfluorfen	ES / HU
Prochloraz	BE / DE
Prohexadione	FR / IE
Spiroxamine	AT / EE
Tefluthrin	HU / DK
Terbuthylazine	ES / HR

Apples

Coordinated by Sabine Lieberz/FAS Berlin

EU-28 PSD for Fresh Apples

Apples, Fresh Market Begin Year	2016/2017		2017/2018		2018/2019	
	Jul 2016		Jul 2017		Jul 2018	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
European Union						
Area Planted	525,660	527,713	522,435	527,792	0	527,772
Area Harvested	512,912	504,141	511,530	500,928	0	503,,227
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	0	0	0	0	0	0
Commercial Production	11,335,034	11,475,296	9,240,980	9,312,335	0	12,500470
Non-Comm. Production	1,256,209	1,247,324	780,000	701,265	0	1,508,100
Production	12,591,243	12,722,620	10,020,980	10,013,600	0	14,008,570
Imports	424,200	424,160	500,000	528,170	0	492,800
Total Supply	13,015,443	13,146,780	10,520,980	10,541,770	0	14,501,370
Fresh Dom. Consumption	7,705,791	7,748,936	6,398,780	6,532,252	0	7,784,830
Exports	1,487,700	1,487,592	820,000	761,578	0	1,372,000
For Processing	3,728,400	3,816,700	3,301,200	3,246,940	0	5,344,540
Withdrawal From Market	93,552	93,552	1,000	1000	0	0
Total Distribution	13,015,443	13,146,780	10,520,980	10,541,770	0	14,501,370

(HA) ,(1000 TREES) ,(MT)

Note: Lines referring to tree numbers are left blank since this data is only available for a few MS.

Sources: Trade: GTA; Withdrawal from market MY 2016/17: EU Commission; All other: FAS/EU-28 estimates

Apples - Commercial Production

The EU-28 is one of the leading producers and consumers of apples in the world. Poland (34 percent of total EU production in MY 2018/19), Italy (18 percent), France (12 Percent), Germany (six percent), and Hungary (four percent) are the top five producing member states and together account for 77 percent of the total EU commercial apple production.

EU-28 apple area is slowly decreasing, mostly due to Polish apple growers grubbing up older orchards after a long period of low apple prices following the Russian import ban. In addition, farmers in the Netherlands converted some of their orchards to pear production because of profitability. However, as the old orchards (especially in Poland) usually were less intensive than newly planted orchards elsewhere, the reduction in area should not reduce the production capacity in the EU-28. Harvested area is rebounding in MY 2018/19 compared to MY 2017/18 when a higher number of orchards were not harvested due to frost damage.

Commercial apple production in MY 2018/19 is forecast to increase by 34 percent compared to the frost-stricken previous year. If realized this would represent the largest production ever recorded in the EU. With the exception of Portugal, Spain, and Latvia all countries show a production increase. Percentagewise the largest relative increases occurred in Slovenia, Belgium, Austria, Sweden, and Hungary; while the largest increases in volume occurred in Poland, Italy, Germany, Hungary, and Belgium, with additional volumes of roughly 1.6 MMT, 500,000 MT, 373,000 MT, 255,000 MT, and 124,000 MT, respectively.

Throughout Europe growing conditions were favorable for apple production during most of the growing season. The winter was mild and the major production regions were spared from frost damage. Apple trees were less affected by the drought in North and North-East Europe than grains, for instance, as they were able to reach moisture in deeper soil layers thanks to their extensive root system. Fruit quality is generally good to excellent as the dry weather significantly reduced the occurrence of pests and fungal diseases. However, some concerns regarding the long-term shelf life exist. Warm temperatures resulted in a two-to-three week earlier harvest compared to the long-term average date for most countries. In regions where the difference between day and night temperatures was not large enough to induce appropriate anthocyanin (the red color) production, problems with insufficient coloring of red varieties are reported. In addition, in some countries, fruit size is smaller than usual. This applies for example to the Czech Republic, France, Hungary, and the Netherlands.

EU-28 Commercial Apple Production by Country and Year in MT

COUNTRY	2016/17	2017/18	2018/19 e	Change 2018:2017 in Percent	Percent of total Production in 2018
Poland	3,504,000	2,700,000	4,300,000	59%	34%
Italy	2,272,027	1,704,283	2,199,530	29%	18%
France	1,519,000	1,468,000	1,466,000	0%	12%
Germany	1,032,913	596,666	970,000	63%	8%
Hungary	402,765	380,070	635,000	67%	5%
Spain	581,160	557,000	548,000	-2%	4%
Romania	360,000	280,000	370,000	32%	3%
Greece	291,753	282,292	290,000	3%	2%
Netherlands	313,700	225,700	256,400	14%	2%
Portugal	238,320	300,000	253,000	-16%	2%
United Kingdom	244,000	207,000	230,000	11%	2%
Austria	60,800	129,355	230,000	78%	2%
Belgium	227,000	84,920	209,000	146%	2%
Czech Republic	124,997	105,280	127,710	21%	1.0%
Croatia	49,000	65,000	85,000	31%	0.7%
Slovenia	42,739	13,605	75,000	451%	0.6%
Lithuania	50,000	48,000	54,000	13%	0.4%
Bulgaria	40,000	40,927	43,000	5%	0.3%
Slovak Republic	20,722	32,477	46,830	44%	0.4%
Ireland	40,000	40,000	42,000	5%	0.3%
Sweden	20,000	18,000	32,000	78%	0.3%
Denmark	24,000	19,000	24,000	26%	0.2%
Latvia	10,000	8,000	7,000	-13%	0.1%
Finland	6,400	6,760	7,000	4%	0.1%
Total	11,475,296	9,312,335	12,500,470	34%	100%

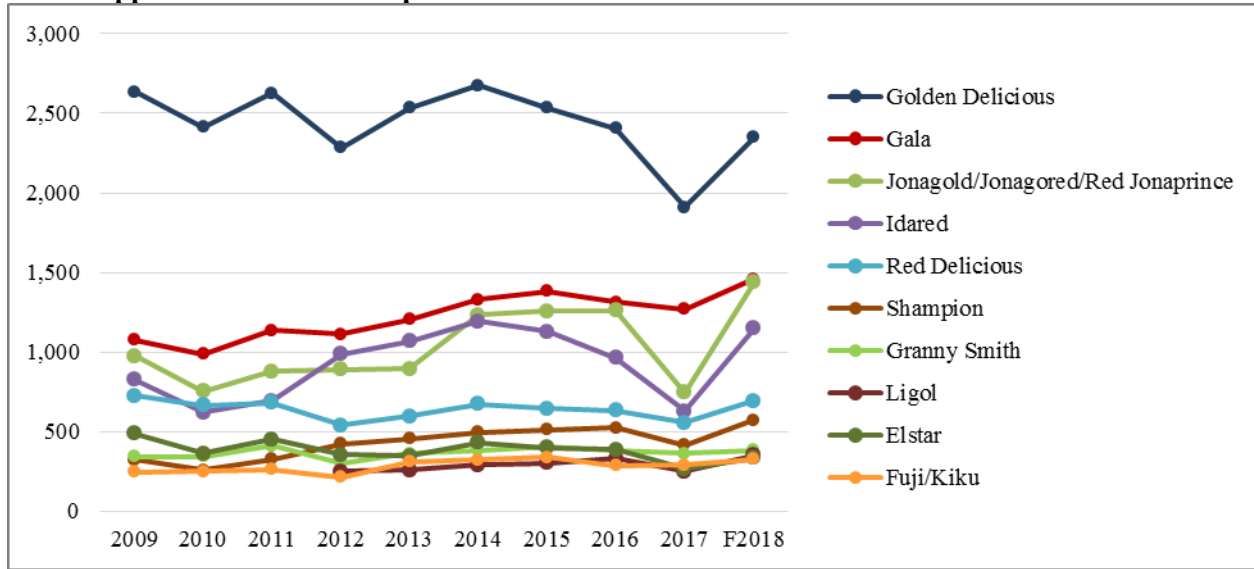
e= estimated

Note: The table is grouped by ranking in MY 2018/19.

Source: FAS/EU-28

Some of 25 apple varieties are produced commercially in the EU in volumes exceeding 10,000 MT. Among these, *Golden Delicious*, *Gala* types, and *Jonagold* types (*Jonagold*, *Jonagored*, *Red Jonaprince*) are the dominant varieties. However, production patterns vary. While *Golden Delicious* is the variety with the largest production in Italy, France, Spain, and Portugal, *Jonagold* is dominant in Germany and Belgium; *Idared* is the number one variety in Poland and Hungary. In contrast, *Gala* achieves its position as the second most produced apple in the EU by being grown in numerous MS rather dominating in a few. New varieties, for example *Pink Lady*, *Kanzi*, *Rubens*, *Tentation*, and *Kiku*, have increased their share of production in recent years. Slovakia, the Netherlands, and the UK have the highest share of “new” varieties in their production portfolio with 13, 12, and 10 percent of their respective total production.

EU-28 Apple Production for Top 10 Varieties in Thousand MT



forecast

Source: FAS/EU-28 based on World Apple and Pear Association (WAPA) data

Apples - Non-commercial Production

Non-commercial production in MY 2018/19 is estimated to have increased by 115 percent compared to MY 2017/18, when frosts resulted in record low production. Theoretically, production could be even higher but in Hungary and Germany some areas might not be harvested as processing facilities reaching their maximum capacity. The production increase is largely a result of a rebound of non-commercial production in Germany, Austria, and Romania. However, most EU member states do not report estimates for non-commercial production. As a result, the production figure provided in in the PSD table at the beginning of the apples’ section is a rough estimate based on industry rather than official information. Non-commercial production tends to alternate between good and poor crop years. In MY 2018/19, non-commercial production represents about eleven percent of total apple production.

Non-commercial production includes apples grown in home gardens and in untended trees in meadows or field edges. Typically, non-commercial production is used for fresh consumption, apple juice and spirits production, baking (cakes, tarts) or preserved foods (canned, dried, and cooked). The amount of apples diverted to the different segments varies depending on the price for processing apples. Higher processing apple prices generally result in a higher proportion of fruit entering juice production. In general, non-commercial production is gradually decreasing in the EU-28 as hobby farmers age. Younger generations have not shown the same interest in small-scale production. Instead, commercial production of higher acid apple varieties for processing is expected to increase to meet demand from the juice concentrate industry.

Apples – Stocks

According to WAPA, EU apple stocks amounted to 165,884 MT on July 1, 2018, compared to 286,380 MT at the same time in 2017, i.e. a decrease of 42 percent. In some member states the stock number comprised of apples stored at POs while in other member states stocks are at POs and wholesalers. More important than the actual number is the year-on-year-change in stocks as end of MY stocks can have a detrimental effect on the prices for the new harvest. In this report, stocks are included in the “fresh domestic consumption” line in the PSD.

Apples – Consumption

Apples are the most popular fruit in all member states except for Spain, where oranges are number one. However, per capita consumption of apples has been decreasing in recent years as consumers eat more soft fruit instead (for example in the U.K. and Germany) or reduce fresh fruits consumption altogether (for example in Spain). The large domestic production and expected lower consumer prices are expected to foster a significant fresh consumption increase compared to the previous year. However, until November, much of the additional consumption will likely consist of apples from backyard production.

Apples - Processing

In MY 2018/19, processing use of apples is expected to increase compared to MY 2017/18 by 65 percent. This will be the highest level in the past ten marketing years. This is largely due to the abundant domestic non-commercial production. In addition, a larger share of table apples are expected to be processed; especially in areas with limited long-term storage capacity. Stocks of concentrated apple juice (CAJ) had been largely depleted at the beginning of MY 2018/19. As a result, prices for processing apples have dropped less than in the previous two years with high non-commercial production (2014 and 2016).

Processing uses for apples include, among others, apple juice, concentrated apple juice (CAJ), cider, wine/brandy, apple sauce, preserves, canning, apple chips, and peeled apples for bakeries. The share of apples used for processing varies significantly by member state, ranging from none in Greece, and the Scandinavian countries to well over 70 percent in Hungary. The processing share also varies from year to year. The EU-28 average share of apples going into processing is forecast to amount to about 34 percent of total supply in MY 2018/19. Major member states with apple processing include Poland, Germany, Hungary, Italy, France, Romania, Austria, Spain, the U.K., and the Czech Republic (in order of descending volume).

Apples – Trade

The majority of trade occurs among the EU-28 countries. Over the past five years, on average about 2.3 million MT of apples were traded between EU member states, while roughly 400,000 to 530,000 MT were imported from outside the EU-28. In recent years imports from outside the EU-28, contributed between three and five percent of the total EU apple supply.

EU-28 external trade

Apples - Imports

For MY 2018/19, EU-28 apple imports from outside the bloc are forecast to decrease by 7 percent because of the ample domestic production. In MY 2017/18, more than 70 percent of EU-28 apple imports originated from three top suppliers (Chile, New Zealand, and South Africa), all of which are located in the southern hemisphere and export mostly during the European off-season.

The main importers of apples were the U.K. and the Netherlands, who together account for 58 percent of the EU-28 imports. However, much of the volume entering the Netherlands is not consumed there but is eventually be transshipped to other member states.

Imports from the United States to the EU-28 occur year-round, albeit at a low level. The reduction of the EU MRL for DPA in March 2014 (see chapter I.3. of policy section) has substantially reduced U.S. apple exports to the EU as only exporters with designated DPA-free facilities are able to ship any longer.

EU-28 Imports of Apples in MT

	MY 2015/16	MY 2016/17	MY 2017/18	Change MY 2017/18 To MY 2016/17	% of Total Imports in MY 2017/18
Chile	120,863	118,960	157,663	33%	30%
New Zealand	109,019	122,309	134,475	10%	25%
South Africa	96,520	87,690	109,713	25%	21%
Brazil	24,029	18,405	28,318	54%	5%
Serbia	23,648	27,751	24,859	-10%	5%
Argentina	15,328	15,758	24,137	53%	5%
Ukraine	63	1,333	11,589	769%	2%
Macedonia	35,927	15,172	9,964	-34%	2%
Moldova	181	413	7,311	1670%	1%
United States	5,356	2,305	5,356	132%	1%
Uruguay	2,399	4,348	3,497	-20%	1%
China	2,071	961	2,343	144%	0.4%
Bosnia & Herzegovina	4,039	513	2,201	329%	0.4%
Australia	699	1,362	1,533	13%	0.3%
Turkey	177	41	1,513	3590%	0.3%
Albania	7,190	4,705	1,410	-70%	0.3%
Other	3,036	2,134	2,288	7%	0.4%
World total	450,545	424,160	528,170	33%	100%

Source: Global Trade Atlas (GTA)

Note: The table is grouped by ranking in MY 2017/18.

Apples - Exports

In MY 2018/19, EU-28 apple exports are forecast to rebound and increase by about 610,000 MT (translating into 80 percent) following the large domestic production. As a result, U.S. apple exporters could face stronger competition on foreign markets, especially from apples originating in Poland and Italy.

In MY 2017/18, exports were 49 percent lower than in the previous marketing year as European apples were significantly more expensive than in the previous season. The large decline of shipments to Algeria followed the introduction of an import-licensing regime in Algeria at the end of 2015. Prior to the announcement of the import-licensing regime, export to Algeria comprised nine percent of all EU apple exports.

In response to the Russian import ban, EU exporters looked at increasing exports to other destinations (Eastern Europe, Northern Africa, the Middle East, and Brazil) with varying success. Those countries that were most successful either have the right variety mix (*Gala*, *Granny Smith*, *Golden Delicious*, *Red Delicious*) and/or were able to build on efforts to open new markets that they started well before the Russian import ban. For example, efforts to open or expand new or nascent markets proved successful in India. Italy, Poland, France, Spain, and Belgium are already exporting to India, while the Czech Republic has concluded a phytosanitary agreement with India in October of 2017 but so far only exported a negligible amount to this destination. Since the start of the pre-clearance program in October 2014, Italy and France are eligible for export to the United States. Poland has concluded agreements with Vietnam and a number of other Asian countries.

The top destinations for EU-28 apples in MY 2017/18 were Belarus, Egypt, and Saudi Arabia. The five largest EU exporters, together accounting for 90 percent of EU apples exports, were Poland (mostly to Belarus, Kazakhstan, Serbia, and Egypt), Italy (to Saudi Arabia, Egypt, and Norway), France (mainly to UAE, Saudi Arabia, Israel, and Thailand), Greece (mainly to Egypt and Jordan), and Spain (mostly to Morocco, Mauritania, and UAE.)

In some large foreign markets, EU and U.S. suppliers compete. These include:

Market	EU countries competing with U.S. apples
Saudi Arabia	Italy, France
UAE	France Italy
India	Italy, Poland, France, Spain, Belgium, the Netherlands

Pears, Fresh

Coordinated by Marcel Pinckaers/FAS The Hague

PSD Table Pears, Fresh

Pears, Fresh Market Begin Year	2016/2017		2017/2018		2018/2019	
	Jul 2016		Jul 2017		Jul 2018	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	120,484	120,484	119,815	118,557	0	118,748
Area Harvested	111,065	111,065	111,168	111,467	0	111,556
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	0	0	0	0	0	0
Commercial Production	2,239,358	2,239,358	2,232,564	2,276,237	0	2,367,358
Non-Comm. Production	100,813	100,813	103,205	110,159	0	157,600
Production	2,340,171	2,340,171	2,335,769	2,386,396	0	2,524,958
Imports	208,600	208,577	215,000	197,389	0	185,000
Total Supply	2,548,771	2,548,748	2,550,769	2,583,785	0	2,709,958
Fresh Dom. Consumption	1,942,912	1,964,863	1,934,589	1,957,924	0	2,027,245
Exports	308,800	308,754	350,000	345,067	0	365,000
For Processing	296,059	275,131	264,180	280,794	0	317,713
Withdrawal From Market	1,000	0	2,000	0	0	0
Total Distribution	2,548,771	2,548,748	2,550,769	2,583,785	0	2,709,958

(HA) ,(1000 TREES) ,(MT)

Note: lines referring to tree numbers are left blank since this data is only available for a few MS

Source: USDA Foreign Agricultural Service

Pears – Production**Pears – Commercial Production**

For MY 2018/19, EU commercial pear production is estimated to be up by 4.0 percent compared to MY 2017/18. There are some differences across the EU pear producing regions. For instance, in most Southern European countries pear production is expected to be somewhat down while production in Northern European countries will be higher. Production in Poland, Germany, and Hungary is expected to rebound after a record low production last Marketing Year.

The leading six pear producing EU MS together represent almost 90 percent of total EU production; these countries are all located in the Western part of the EU, see the following table. Italy is the EU's largest producer with almost 32 thousand hectares of pear orchards. Italy's Emilia-Romagna is its main pear producing area, covering around three-quarter of Italy's total pear production. Production in MY 2018/19 is estimated at 741 thousand MT, similar to last year. The quality and size of the harvested pears is expected to be excellent this year. *Abate Fetel* continues to be Italy's leading variety.

Planted pear acreage continues to grow in the Netherlands and is expected to pass the ten thousand hectares (10,058 hectares) this year. Despite the drought, Dutch pear production (mainly *Conference* pears) is estimated at 398 thousand MT, up by 21 percent compared to last year's low production figures. High temperatures in combination with a lack of rainfall between May and the end of August initially had a negative impact on the pear size. During these months, growers in the middle of the country irrigated their orchards. This, in combination with rainfall as of the end of August, resulted in good-sized pears in the center of the Netherlands and, therefore, an overall good harvest. In most cases it is not possible to irrigate orchards in the Southern part of the Netherlands and this resulted in smaller sized pears. Furthermore, there was hardly any damage due to freezing or hail this year. The abundance of sun had a positive impact on the taste. The keeping quality of Dutch pears is expected to be good this year especially for pears from irrigated orchards.

Pear production in Spain is expected to decrease by six percent this MY to 334 thousand MT due to unfavorable weather conditions during spring and hailstorms during summer. Catalonia continues to be Spain's leading pear producing region, responsible for 40 percent of total production, followed by Aragon and La Rioja. The main varieties are *Conference*, *Limonera* (in Catalonia and Aragon), *Ercolini* (in Murcia and Catalonia) and *Blanquilla* (in Catalonia, Aragon and Murcia). The harvested area has been decreasing over the past ten years as stone fruit orchards slowly replace pear orchards due to improved profitability.

Pear area planted continues to increase not only in the Netherlands but also in Belgium and now totals 10,184 hectares. Pear production is concentrated in Flanders. Flowering and the early part of the growing season were good due to the optimal weather conditions. However, the drought that followed, in combination with several heat waves, negatively influenced the pear size. Most Belgian growers were unable to irrigate their orchards, similar to growers in the Southern part of the Netherlands. Once the drought was over, it was too late for the pears to fully catch up. Due to the somewhat smaller sized pears, production is estimated at 309 thousand MT. The taste is expected to be good.

After a very high pear production in Portugal in MY 2017/18 (184 thousand MT), production is estimated at 156 thousand MT this Marketing Year, down by 15 percent. The decline is mainly due to unfavorable weather conditions during flowering, heavy rain in June and some hail in the North of Portugal. The unique pear variety growing in Portugal is *Rocha*.

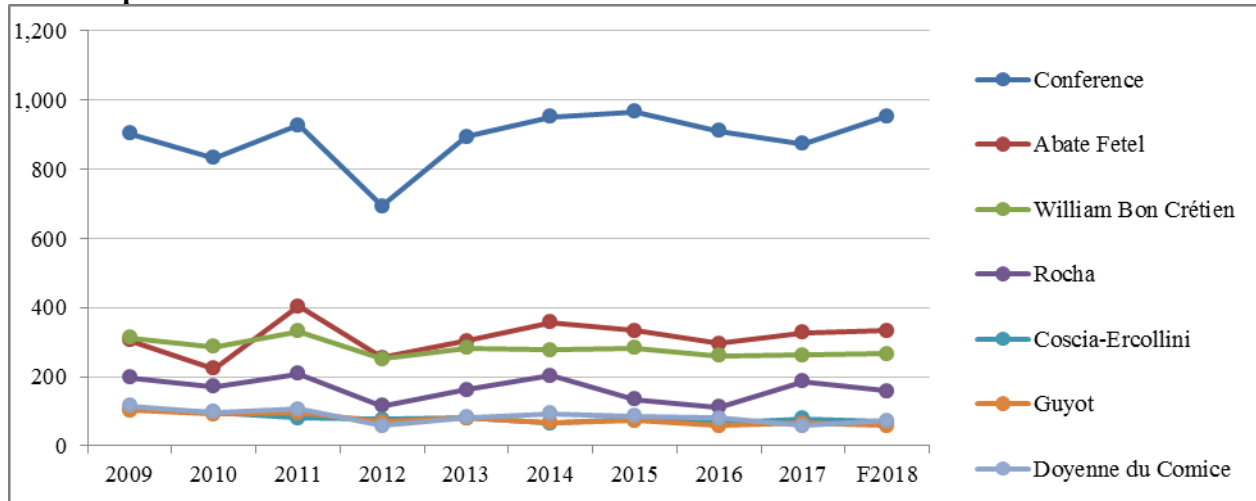
EU-28 Commercial Pear Production by Country and Year

	MY 2015/16	MY 2016/17	MY 2017/18	MY 2018/19	% Change	% of Total EU Production
Italy	764,000	681,000	738,000	741,000	0	31.3
Netherlands	345,000	370,000	327,000	394,000	+21	16.6
Spain	350,755	345,655	356,100	334,000	-6	14.1
Belgium	357,500	313,000	302,170	309,000	+2	13.1
Portugal	139,190	111,020	184,000	156,000	-15	6.6
France	141,000	129,000	130,000	130,000	0	5.5
Poland	59,878	75,500	50,100	80,000	+60	3.3
Greece	72,417	66,197	73,246	75,000	+2	3.2
Germany	43,071	34,625	23,386	35,000	+50	1.5
Hungary	31,249	36,690	23,000	28,100	+22	1.2
United Kingdom	25,000	27,000	25,000	22,000	-12	0.9
Romania	17,000	19,000	18,000	19,000	+6	0.8
Other	39,300	30,671	26,235	44,258	+69	1.9
Total Production	2,385,360	2,239,358	2,276,237	2,367,358	+4	0

Source: USDA Foreign Agricultural Service

The total EU pear area harvested is forecasted to stabilize around 112 thousand hectares this year. The area harvested in Spain is recently expected to stabilize after nearly a decade declining area as (more profitable) stone fruit orchards replacing pear orchards. On the other hand, the area harvested in Belgium and the Netherlands continues to grow annually by about 500 hectares as growing *Conference* pears is more profitable than growing apples.

EU Pear production for selected varieties in thousand MT



forecast

Source: WAPA data

Over 40 percent of all pears grown in the EU are *Conference* pears, mainly grown in Belgium, the Netherlands and Spain. Other popular varieties include *Abate Fetel* (grown in Italy), *William Bon Crétien/Bartlett* (grown in Italy, Spain and France) and *Rocha* (grown in Portugal). Dutch and Belgian growers are developing and starting to grow new club varieties such as *Migo*, *Sweet Sensation* and *Red Conference*.

Pears – Non-Commercial Production

Non-commercially produced pears include pears grown in house gardens and meadows. If they are harvested, they are predominantly for domestic use, both for fresh consumption or processing. Austria, Czech Republic, Romania, Slovakia and Slovenia have non-commercial production figures of around 50 percent or more of total pear production. For MY 2018/19, non-commercial pear production is estimated to increase by more than 47 thousand MT. The increase is mainly the result of higher production numbers in Austria this year after having poor pear crops last year and the year before.

Pears – Consumption

The per capita consumption of pears slightly fluctuates from year to year. The average per capita consumption of pears in the EU is estimated at almost four kg per year. The highest per capita consumption can be found in the leading pear producing countries. Italy for instance has the highest per capita consumption with almost ten kg per year, followed by Portugal, the Netherlands, Greece, Spain and Belgium. The lowest per capita consumption markets in the EU, two kg per year or less, are Hungary, Slovakia, Poland, and Lithuania. In MY 2018/19 EU consumption of fresh pears is expected to remain stable.

On the MS level, the most popular pear varieties are those that are regionally grown. The number of varieties offered at retail level is usually between two to four. Taste, price, texture, and appearance are the main reasons for buying pears. There is also a trend among consumers in Northwest Europe towards preferring somewhat smaller sized pears. Finally, the demand for local and organic pears continues to grow. Switzerland, Denmark, Sweden, Luxembourg and Austria already have a per capita spending on organics of more than \$200 per year.

Processing

EU growers produce pears for the fresh market. Some pears however are not suitable for the fresh market due to their shape, size, or quality. These pears are used for further processing (for instance by the canning, juice, and baking industry). Pears not suitable for human consumption (fresh and further processing) are used for animal feed or fermenting. The processing numbers also include pears not suitable for either animal or human consumption. Prices for fresh pears also influence the volume used for processing. In MY 2017/18, 281 thousand MT pears were used for processing.

In MY 2018/19 it is expected that the volume of pears used for processing will be around 318 thousand MT. Italy, Austria, Spain, and Poland have the highest processing numbers and their combined volumes account for two-third of total EU pear processing numbers. In Austria, processing numbers are up by 25 thousand MT due to a large non-commercial crop this year. The majority of these pears will be used for producing Perry (or pear cider), an alcoholic beverage made from fermented pears, pear juice, and pear schnapps. In Italy, the juice industry is the leading buyer of pears that are not suitable for fresh consumption. In other countries, pears are also processed into fruit jelly and used by the canning industry.

Pears – Trade

EU 28 external trade

Imports

The Netherlands and Italy together account for almost 70 percent of EU pear imports. The majority of the volume entering the port of Rotterdam is shipped to MS like Germany, France, and the U.K. while Italy's imports predominantly stay on the Italian market. Other importing MS, albeit at much smaller scale, are the U.K., France, and Spain.

The amount of pears imported in MY 2017/18 was down since several former export markets now import directly from Southern Hemisphere countries whereas before these pears were traded via the EU; this trend is expected to continue. For MY 2018/19, total EU pear imports are expected to further drop to an estimated 185 thousand MT due to sufficient good quality pears available within the EU this year.

Pears are imported into the EU to serve the fresh consumer market. Below table demonstrates that the EU mainly imports pears from Southern Hemisphere countries to complement domestic production. Import from these countries starts in February, directly after harvesting in these countries, peaks in April and ends after July. Popular imported varieties include *Packham*, *Williams Bon Crétien*, *Forelle* and *Abate Fetel*.

EU Import of Pears in MT

Country of Origin:	*MY 2015/16	*MY 2016/17	MY 2017/18	Change MY 2017/18 to MY 2016/17	% of Total EU Imports
South Africa	96,656	88,285	76,655	-13	39
Argentina	64,323	46,502	52,069	+12	26
Chile	47,596	56,777	45,927	-19	23
China	10,909	11,160	12,984	+16	7
Turkey	1,569	1,833	5,991	+227	3
Serbia	343	675	1,477	+119	1
Bosnia & Herzegovina	303	842	554	-34	0
New Zealand	537	413	434	+5	0
Uruguay	285	1,679	387	-77	0
United States	154	31	172	+445	0
Korea, South	84	84	141	+67	0
Moldova	22	0	139	∞	0
Australia	0	0	123	∞	0
Belarus	534	101	66	-35	0
Switzerland	92	62	59	-5	0
Other	206	133	211	+59	
Total	223,613	208,577	197,389	-5	100

Source: Global Trade Atlas, USDA Foreign Agricultural Service

*revised numbers

China is the EU's fourth largest supplier of pears and the only supplier of the *Ya* variety which is consumed by the Asian population in the EU.

Imports of pears from the United States dropped to a record low number in MY 2016/17 (31 MT) mainly due to strict pesticide MRLs. U.S. pears compete with pears produced in the EU. Besides a price difference, consumers (especially in the Nordic region), seem to prefer *Conference* pears above *Anjou* pears from the United States. In MY 2017/18, imports of pears from the United States rebounded to 172 MT, however. Industry contacts indicate that these pears are certified organic pears and are mainly sold in high-end U.K. supermarkets.

Exports

EU pear exports stabilized in MY 2016/17 but grew again in MY 2017/18 due to increased trade with the main existing (except Belarus) and new export markets. For MY 2018/19 pear exports are expected to be somewhat up due to sufficient good quality pears available within the EU.

Belarus continues to be the largest export market for EU pears but also other countries that have close proximity to Russia are important markets for mainly *Conference* pears, especially those produced in Belgium and the Netherlands.

Pear exports to Brazil grew by almost 50 percent in MY 2017/18 due to a high harvest of *Rocha* pears in Portugal. With an expected lower harvest in MY 2018/18 compared to record high harvest last year, exports to Brazil are expected to slightly decrease.

EU pear exports to mature markets Norway and Switzerland are expected to not change much compared to MY 2017/18. This also applies to exports to Morocco and countries in the Middle and Far East which have all proven to be profitable and stable markets for EU pears.

Trade with Hong Kong dropped while pear exports to China grew by over 50 percent in MY 2017/18 and now totals five thousand MT. Industry experts expect exports to China to grow further in MY 2018/19.

Due to the existing Russian import ban and uncertainty regarding Brexit, pear producers not only want to grow existing markets but also are looking for new markets in Asia, the Middle East, and the Americas. It is important to note that even when these new markets like Canada and Mexico open, it takes years to develop a sustainable market for unknown varieties.

EU Export of Pears in MT

Country of Destination:	*MY 2015/16	*MY 2016/17	MY 2017/18	Change MY 2017/18 to MY 2016/17	% of Total EU Exports
Belarus	148,201	149,034	131,111	-12	38
Brazil	42,813	43,257	63,215	+46	18
Morocco	15,272	21,219	40,885	+93	12
Norway	17,264	17,185	17,317	+1	5
Kazakhstan	10,189	8,581	11,702	+36	3
Switzerland	6,017	6,292	11,521	+83	3
Bosnia & Herzegovina	9,304	10,563	10,729	+2	3
Saudi Arabia	5,863	5,145	7,572	+47	2
China	3,130	3,253	5,091	+57	1
Armenia	2,103	223	3,562	+1,496	1
United Arab Emirates	4,381	3,639	3,532	+3	1
Israel	5,263	3,738	3,457	+8	1
Jordan	2,202	1,739	3,193	+84	1
Serbia	2,145	4,413	2,963	+33	1
Libya	6,779	2,255	2,745	+22	1
Canada	2,014	1,623	2,728	+68	1
Albania	2,258	1,991	2,586	+30	1
Hong Kong	4,474	3,670	2,524	-31	1
Other	19,950	20,934	18,634	-11	5
Total	309,622	308,754	345,067	+12	100

Source: Global Trade Atlas, USDA Foreign Agricultural Service

*revised numbers

Pears - Prices

Despite the fact that the Russian market is still closed, producer prices for pears are expected to be average this year due to a good pear production. The pear industry has been successful in opening new markets and will continue to do so.

Pears – Withdrawal from Market

As described in the Policy Chapter, the EU Commission introduced specific market support measures for the European fruit and vegetable sector since the start of the ban in 2014 until 2017. The last emergency measures for fruit and vegetables were phased out on June 30, 2018. The EU granted \$588 million (€500 million) of aid to EU producers of fruit and vegetables corresponding to 1.7 million tons of withdrawals from the market. More detailed information on withdrawal from market can be found in the Policy Chapter.

Pears – Additional Information

For information on tariffs, and maximum residue levels please see the respective sections in the policy part of this report.

Table Grapes

Coordinated by Ornella Bettini/FAS Rome

EU-28 PSD for Table Grapes

Grapes, Fresh Market Begin Year	2016/2017		2017/2018		2018/2019	
	Jun 2016		Jun 2017		Jun 2018	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	96,489	96,654	96,755	97,446	0	97,450
Area Harvested	92,093	91,590	92,778	92,140	0	92,190
Commercial Production	1,659,331	1,711,400	1,442,000	1,442,063	0	1,545,000
Non-Comm. Production	6,822	6,822	8,000	11,297	0	11,500
Production	1,666,153	1,718,222	1,450,000	1,453,360	0	1,556,500
Imports	648,500	648,566	635,000	684,797	0	688,000
Total Supply	2,314,653	2,366,788	2,085,000	2,138,157	0	2,244,500
Fresh Dom. Consumption	2,227,153	2,279,310	2,006,200	2,059,445	0	2,166,000
Exports	86,800	86,778	78,800	78,712	0	78,500
Withdrawal From Market	700	700	0	0	0	0
Total Distribution	2,314,653	2,366,788	2,085,000	2,138,157	0	2,244,500
(HA), (MT)						

Source: FAS EU-28

Table Grapes – Commercial Production

The European Union is a world leader in table grape production, with Italy, Greece, and Spain accounting for approximately 92 percent of the total EU production. In MY 2018/19 (June/May) EU-28 table grape commercial production is forecast to recover significantly from the previous campaign, up 7.1 percent, mostly due to volume increases in Italy, up 13.3 percent, despite humid conditions during flowering and summer rains. Production increases are also forecast in France (up 23.8 percent) and Romania (up 1.3 percent) compensating for reduced quantities in Portugal (down 26.4 percent) and Bulgaria (down 4.2 percent) due to unfavorable weather. Volumes in Greece and Spain are expected to remain flat. Overall, fruit quality is forecast to be good with higher sugar content due to hot temperatures in July and September. MY 2018/19 EU-28 table grape area is forecast to keep the upward trend thanks to new investments in seedless varieties (*Sugraone*, *Crimson*, *Thompson*, *Sublime*, etc.) in Italy, driven by an increasing demand from intra- and extra- EU markets.

Italy is the leading table grape producer in the EU-28, followed by Greece and Spain. Table grape production is concentrated in Southern Italy, mainly in Puglia and Sicilia, which account for 70 and 25 percent of the domestic production, respectively. *Italia*, *Victoria*, *Palieri*, and *Red Globe* are the main seeded varieties, covering approximately 70 percent of the table grape area. Early varieties (*Black Magic* and *Vittoria*) are sold from May to the end of July. For medium and late varieties (*Italia*, *Palieri*, *Pizzutello Bianca*, and *Red Globe*)—mainly from Sicilia, Abruzzo, Puglia, Basilicata, and Sardegna—the harvest occurs from August to December. Seedless varieties (*Sugraone*, *Crimson*, *Thompson*, *Sublime*, etc.) represent approximately 30 percent of the domestic production, but are forecast to increase significantly in the coming years.

In Greece, there are approximately 17,000 hectares currently cultivated with table grapes. The main producing areas include the prefectures of Corinth in Peloponnese; Kavala in Macedonia; and Heraklion on the island of Crete. *Sultana (Thompson Seedless)* and *Victoria* are the leading varieties. Moreover, a greater focus is now being placed on diversifying Greece's grape offer to extend the marketing season into October and November.

In Spain, there are approximately 14,000 hectares currently cultivated with table grapes. In MY 2017/18, approximately 6,000 hectares were planted with new varieties to replace older ones. The main producing area is the Region of Murcia, accounting for 70 percent of total production, followed by Alicante and Seville. Over 50 table grape varieties are commercialized in Spain. *Aledo*, *Ideal*, *Muscatel*, *Dominga*, and *Napoleon* are the main ones. Seedless varieties represent 30 percent of the domestic production and are mainly cultivated in the Region of Murcia. The main seedless variety is *Apirena*.

EU-28 Commercial Table Grape Production by Country and Year in MT

COUNTRY	MY 2016/17	MY 2017/18	MY 2018/19 ^e	% change 2018/19 - 2017/18	% of total production in 2018
Italy	1,000,000	750,000	850,000	13.3	55
Greece	315,239	311,123	310,000	-0.4	20.1
Spain	281,955	266,200	266,000	-0.1	17.2
France	50,000	42,000	52,000	23.8	3.4
Romania	34,000	39,000	39,500	1.3	2.6
Portugal	20,140	21,740	16,000	-26.4	1
Bulgaria	10,066	12,000	11,500	-4.2	0.7
Total	1,711,400	1,442,063	1,545,000	7.1	100

e= estimated

Source: FAS/EU-28

Table Grapes – Non Commercial Production

EU-28 table grape non-commercial production includes table grapes grown in home gardens, meadows, or field edges. MY 2018/19 EU-28 table grape non-commercial production is forecast to increase by 1.8 percent compared to the previous campaign due to higher volumes in Romania (up 5.5 percent) compensating for reduced quantities in Bulgaria (down 13 percent) due to spring rains and hail storms.

Table Grapes – Consumption

EU-28 fresh grape consumption is forecast to recover in MY 2018/19 driven by Italy's increased production. Starting in June and throughout the end of the calendar year, the EU-28 table grape consumption is mostly met by domestic production. In addition, imports from third countries—normally coming in the first half of the calendar year from the Southern hemisphere—represent approximately 25 percent of total consumption.

Italy is the leading table grape consumer in the EU-28, followed by Germany, the United Kingdom, Greece, France, Spain, Romania, Czech Republic, Portugal, Austria, Bulgaria, Slovakia, Croatia, and Slovenia. Despite the fact that Italian seeded grapes are still greatly appreciated, EU-28 consumers are increasingly demanding seedless varieties (*Sugraone*, *Crimson*, *Thompson*, *Regal*, *Summer Royal*, *Centennial*, *Sublime*, etc.), because of their quality and convenience. Moreover, a greater focus is now being placed on late varieties (*Crystal* and *Princess*), in order to make the European grapes available after the busy summer fruit season.

Table Grapes - Trade

Imports

The EU-28 is a net importer of fresh table grapes. MY 2018/19 EU-28 table grape imports are forecast to keep an upward trend—despite the increased domestic production—due to a rather stable demand. During MY 2017/18, EU-28 table grape imports increased by 5.6 percent from the previous campaign due to bigger volumes from Moldova (up 66 percent), Egypt (up 54 percent), Namibia (up 31 percent), Turkey (up 26 percent), and Brazil (up 23 percent). South Africa, Chile, and India remain the leading suppliers, accounting for 30, 16, and 13 percent of total imports. The largest EU-28 importing countries remain the Netherlands, Germany, and the United Kingdom. These are followed by France, Belgium, Austria, Spain, and Italy. The Netherlands serves mainly as a trans-shipping point.

EU-28 Imports of Table Grapes in MT

COUNTRY	MY 2015/16	MY 2016/17	MY 2017/18	% change 2017/18 - 2016/17	% of total imports in 2017/18
South Africa	197,669	214,909	205,128	- 4.55	29.95
Chile	103,071	109,289	111,033	1.60	16.21
India	82,290	94,851	88,575	- 6.62	12.93
Egypt	54,997	49,578	76,329	53.96	11.15
Peru	64,058	62,921	63,102	0.29	9.21
Turkey	24,344	31,404	39,735	26.53	5.80
Brazil	29,324	28,018	34,362	22.64	5.02
Namibia	18,070	18,976	24,899	31.22	3.64
Moldova	11,730	12,313	20,471	66.25	2.99
Morocco	8,093	6,851	6,424	- 6.23	0.94
United States	6,401	4,399	5,199	18.17	0.76
Macedonia	6,394	10,632	3,965	- 62.70	0.58
Mexico	1,797	1,471	1,597	8.56	0.23
Bosnia & Herzegovina	730	543	1,007	85.31	0.15
Israel	1,649	665	795	19.64	0.12
Argentina	3,293	543	729	34.45	0.11
Lebanon	397	673	502	- 25.42	0.07
China	14	35	284	713.69	0.04
Norway	34	25	60	135.95	0.01
Japan	-	6	53	721.09	0.01
Other	614	460	543	18.04	0.08
World	614,969	648,566	684,797	5.59	100.00

Source: Global Trade Atlas (GTA)

Exports

MY 2018/19 EU-28 table grape exports are forecast to continue the downward trend due to high transportation costs and discouraging bureaucratic delays. During MY 2017/18, EU-28 table grape exports went down by 9.3 percent from the previous campaign as a result of the decreased production. Switzerland and Norway confirmed to be the leading destinations, accounting for 38 and 17 percent of total exports, respectively. Seedless varieties (*Sugar Crisp*, *Sweet Sunshine*, *Sweet Celebration*, *Sweet Sapphire*, *Jack's Salute*, and *Cotton Candy*) are mainly sent to the United Kingdom, Scandinavian countries, and the United Arab Emirates.

EU-28 Exports of Table Grapes in MT

COUNTRY	MY 2015/16	MY 2016/17	MY 2017/18	% change 2017/18 -2016/17	% of total imports in 2017/18
Switzerland	29,141	29,874	29,867	- 0.02	37.94
Norway	14,222	13,682	13,889	1.51	17.65
Belarus	7,419	5,560	3,621	- 34.88	4.60
United Arab Emirates	6,474	5,405	2,971	- 45.04	3.77
South Africa	2,539	2,715	2,800	3.11	3.56
Saudi Arabia	4,192	3,444	2,194	- 36.28	2.79
Russia	2,783	4,298	2,175	- 49.40	2.76
Albania	2,154	2,390	2,138	- 10.54	2.72
Bosnia & Herzegovina	2,056	2,416	2,113	- 12.53	2.68
Ukraine	1,929	1,918	1,590	- 17.12	2.02
Brazil	1,213	1,022	1,014	- 0.82	1.29
Canada	415	468	1,005	114.91	1.28
Iceland	795	743	970	30.56	1.23
Qatar	336	494	831	68.22	1.06
Oman	396	370	781	111.16	0.99
United States	863	791	712	- 9.96	0.90
Jordan	616	1,014	675	- 33.44	0.86
Sri Lanka	674	912	655	- 28.16	0.83
Macedonia	166	105	547	419.29	0.70
Morocco	339	373	505	35.54	0.64
Other	8,391	8,784	7,662	-12.8	9.73
World	87,117	86,778	78,712	- 9.29	100.00

Source: GTA

Table Grapes – Additional Information

For information on tariffs, maximum residue levels, and labeling requirements, please see the respective policy sections in the report.

Trade Fairs

In the EU, trade fairs play a key role in presenting new products to the trade or in finding additional buyers and importers. The major international trade fair for the fruit and vegetable trade is held each February in Berlin, Germany:

FRUIT LOGISTICA Berlin, Germany (Interval: yearly) Target Market: Europe, Middle East, India Good venue for exhibiting fresh and dried fruit, nuts, and related products http://www.fruitlogistica.de	Next Fair: February 6 - 8, 2019	U.S. Pavilion Organizer: B*FOR International Tel: +1 (540) 373-9935 E-mail: Info@b-for.com
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For organic products there is a special trade fair held annually in Nuremberg, Germany:

BioFach Nuremberg, Germany (Interval: yearly) Target Market: Germany/Europe The leading European trade show for organic food and non-food products http://www.biofach.de	Next Fair: February 13 – 16, 2019	U.S. Pavilion Organizer: NuernbergMesse North America, Inc. Tel: +1 (770) 618-5837 E-mail: Jessica@NMNA.us
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