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Report Highlights:

Following a record crop in MY 2018/19, various unfavorable weather conditions across the EU lead to a 19 percent lower commercial apple, 13 percent lower pear, and 14 percent lower table grape production forecast in MY 2019/20. As a result of the lower domestic production, exports are expected to decline. U.S. exporters may find additional market opportunities in countries where they previously faced strong competition from EU exporters.

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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Abbreviations and terms not otherwise defined in the report:

EU	European Union – 28 member states
FAS	Foreign Agricultural Service
GTA	Global Trade Atlas
HA	Hectare; 1 ha = 2.471 Acres
kg	Kilogram
MT	Metric Ton = 1000 kg
TMT	Thousand Metric Tons
MMT	Million Metric Tons
MS	EU Member State(s)
MY	Marketing year
Apples:	July/June
Pears:	July/June
Table Grapes:	June/May
PSD	Production, Supply and Demand
USEU	U.S. Mission to the European Union

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's (EU) fruit and vegetables regime and is part of the Common Agriculture Policy (CAP). The below information details the EU policy related to fresh deciduous fruit. The second section explains the EU measures that were taken in response to the Russian embargo. The third section lists the upcoming maximum residue levels (MRLs) reviews under Article 12 of Regulation 396/2005.

I. EU Policy Related to Fresh Deciduous Fruit

1. The Common Agriculture Policy (CAP)

Regulation 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 (Regulation 543/2011).

On June 1, 2017, 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 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. Regulation 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.

National authorities must determine, in their national strategies, which of these instruments can receive funds in their countries. 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, information campaigns on healthy eating habits, and monitoring and evaluation. As in previous years, the EU funds of $264 million (€250 million) are allocated in the school year 2019/20 to all of the Member States (MS).

Commission Implementing Decision C(2019)2249 on the new School Scheme for Milk, Fruit and Vegetables applies since August 1, 2019**.**

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 be no longer need for national co-funding and EU associations will be able to apply directly for a program.

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

At least 10 percent of operational program funding must be spent on environmental actions that go beyond mandatory environmental standards. MS 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 MS concerned.

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 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.

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. Directive 2019/523 amends Annexes I to IV of Directive 2000/29/EC and sets (new) protective measures against the introduction of harmful organisms for the import of several fruit and vegetable products from September 1, 2019. However, it is the worthwhile to check the specific article in Directive 2019/523 for each of the product/harmful organism combinations since these are all different. Most requirements (e.g. for citrus and mango) are applicable for all third countries, but there are also requirements for certain products (apple, pear, blueberry) which only apply to the United States (U.S.), Canada and Mexico. The new legislation has established the obligation for non-EU countries to communicate some information for importing certain commodities under specific import requirements.
On the following website you can find official information submitted by non-EU countries:
https://ec.europa.eu/food/plant/plant_health_biosecurity/non_eu_trade/declarations_en

In addition, Directive 2000/29/EC will be repealed on December 14, 2019 and will be replaced by Regulation 2016/2031 of the European Parliament and of the Council concerning protective measures against pests of plants. 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

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, 2019. 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

The 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 subscription page for 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 U.S. apples exported to the EU have decreased substantially. Only a few U.S. 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.

Tariff levels for 2019 are published in Regulation 2018/1602.
Apples see pages 97 and 687-689
Pears see pages 97 and 689-691
Concentrated Apple Juice 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 one year ban on a range of agricultural and food products, including fresh deciduous fruit, from the US, EU, Canada, Australia, and Norway, in response to U.S. and EU sanctions over Russian actions in Ukraine. Russia has extended the ban every year since; In June 2019, President Putin signed a decree extending the ban until the end of 2020. For more information, See GAIN report RS1907.

The CMO rules (see Regulation 1308/2013 in part I) provided 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 ever important issue in the EU as there is a significant reduction in the number of approved active substances that are available for use. Regulation 1107/2009 and Regulation 396/2005 regulate PPPs and MRLs respectively. There is a consistent ongoing review (and renewal) of active substances and their associated MRLs. Existing MRLs are 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 the 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 should 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 and/or if data collection trials are in progress or should be initiated (especially if the substance is not used or authorized in the EU). It is highly recommended to contact the assigned "Rapporteur Member State" 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 Review - upcoming MRL reviews

	Apple	**Pears**	**Table Grapes**	**RMS***	**Start of data collection**	**Adoption of the RO** (expected date)**
Fluopyram	x	x	x	DE (AT)	10/13/2017	12/02/2019
Spinetoram		x	x	UK (HR)	10/15/2018	12/23/2019
Metaflumizone		x	x	UK (SE)	11/15/2018	03/02/2020
Fenazaquin	x	x		EL (DE)	02/14/2018	12/20/2019
Ametoctradin			x	NL (DE)	05/15/2018	12/02/2019
Proquinazid			x	UK (SE)	06/15/2018	12/09/2019
Fluxapyroxad		x	x	UK (FR)	06/15/2018	01/06/2020
Spirotetramat	x	x	x	AT	07/15/2018	01/06/2020
Acequinocyl		x	x	NL (DE)	08/15/2018	01/01/2020
Flubendiamide		x	x	EL	09/15/2018	02/25/2020

*RMS: rapporteur member state
**Expected date of Reasoned Opinion by the European Food Safety Authority

2) Active substances up for review

	Expiry date	Last day of Application:
Flumetralin	12/11/2022	12/11/2019
Glyphosate	12/15/2022	12/15/2019
Esfenvalerate	12/31/2022	12/31/2019
Fenpyrazamine	12/31/2022	12/31/2019

Apples

Coordinated by Sabine Lieberz/FAS Berlin

PSD Apples, Fresh

Apples, Fresh	2017/2018		2018/2019		2019/2020	
Market Begin Year	Jul 2017		Jul 2018		Jul 2019	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	527792	533823	527772	531246	0	530658
Area Harvested	500928	505817	503227	508013	0	507840
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	9312335	9325827	12500470	13166729	0	10626790
Non-Comm. Production	701265	678815	1508100	1863672	0	850000
Production	10013600	10004642	14008570	15030401	0	11476790
Imports	528600	530223	470000	493340	0	488200
Total Supply	10542200	10534865	14478570	15523741	0	11964990
Fresh Dom. Consumption	6532860	6543651	7904030	8197285	0	7389040
Exports	761400	761318	1230000	1175706	0	974750
For Processing	3246940	3228896	5344540	6150750	0	3601200
Withdrawal From Market	1000	1000	0	0	0	0
Total Distribution	10542200	10534865	14478570	15523741	0	11964990
(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 for MY 2017/18 and 2018/19: GTA accessed on September 3, 2019; Withdrawal from market MY 2017/18: EU Commission; All other: FAS/EU estimates

Apples - Commercial Production

The EU is one of the leading producers and consumers of apples in the world. Poland (25 percent of total EU production in MY 2019/20), Italy (21 percent), France (15 Percent), Germany (9 percent), and Spain (6 percent) are the top five producing MS and together account for 75 percent of the total EU commercial apple production.

Commercial apple production in MY 2019/20 is forecast to decrease by 19 percent compared to the record harvest in the previous year and 3 percent compared to the average of the previous ten years.
The decrease is due to a combination of late spring frosts (Czech Republic, northern- and north-eastern Germany, Poland, Hungary), poor pollination (Hungary, Romania), drought/heat (Austria, Poland, UK), and hail damage (Hungary, Greece). France, Spain, Portugal, the Netherlands, and Bulgaria report higher production than in MY 2018/19 but the combined increase is not large enough to compensate for the reduction elsewhere. Spain and Portugal benefitted from more rain and cooler temperatures than usual, while the drought in Netherlands was less severe in 2019 than it had been in 2018.

EU apple area is slowly decreasing mostly due to acreage reductions in Poland, Belgium, and the Netherlands. In Poland, apple growers are grubbing up older orchards after a long period of low apple prices following the Russian import ban. In the Netherlands, growers are either leaving the business or are moving into the production of *Conference* pears because of higher profitability. However, as the old orchards (especially in Poland) were usually less intensive than newly planted orchards elsewhere, the reduction in area should not reduce the production capacity in the EU.

In central and northern Europe (France, Germany, Italy, UK) a heatwave at the end of June combined with a lack of rain lead to a reduction of fruit size in the early varieties while later varieties that benefitted from later rains show a normal size distribution. The upside of this is a good fruit quality as there was little infestation by fungal diseases.

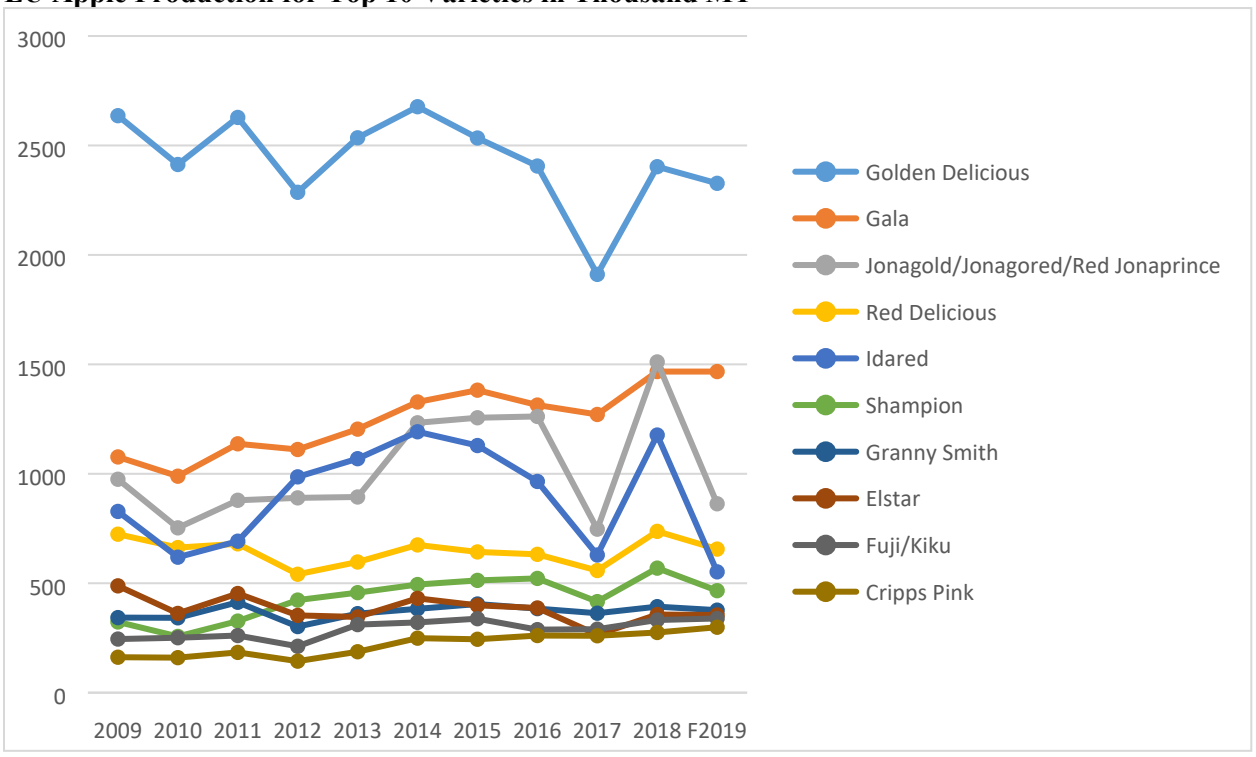
EU Commercial Apple Production by Country and Year in MT

COUNTRY	2017/18	2018/19	2019/20 e	Change 2019:2018 in Percent	Percent of total Production in 2019
Poland	2,700,000	4,700,000	2,700,000	-43%	25%
Italy	1,704,283	2,264,081	2,194,760	-3%	21%
France	1,453,000	1,443,000	1,542,000	7%	15%
Germany	596,666	1,093,000	949,000	-13%	9%
Spain	552,385	532,950	602,370	13%	6%
Hungary	439,877	589,520	372,000	-37%	4%
Romania	280,000	470,000	350,000	-26%	3.3%
Portugal	300,000	253,000	293,000	16%	2.8%
Greece	282,292	293,958	285,000	-3%	2.7%
Netherlands	228,000	267,000	285,000	7%	2.7%
Belgium	84,920	222,200	220,000	-1%	2.1%
United Kingdom	207,000	219,000	215,000	-2%	2.0%
Austria	129,355	239,979	190,000	-21%	1.8%
Czech Republic	105,280	151,528	120,000	-21%	1.1%
Croatia	55,000	90,500	65,000	-28%	0.6%
Slovenia	13,605	86,587	56,000	-35%	0.5%
Bulgaria	40,927	46,298	54,000	17%	0.5%
Slovak Republic	32,477	43,928	35,660	-19%	0.3%
Lithuania	48,000	62,000	25,000	-60%	0.2%
Ireland	21,000	21,000	21,000	0%	0.2%
Sweden	18,000	32,000	20,000	-38%	0.2%
Denmark	19,000	24,000	15,000	-38%	0.1%
Latvia	8,000	14,000	10,000	-29%	0.1%
Finland	6,760	7,200	7,000	-3%	0.1%
Total	**9,325,827**	**13,166,729**	**10,626,790**	**-19%**	**100%**

e= estimated
Note: The table is grouped by ranking in MY 2019/20.
Source: FAS/EU

In the EU, approximately 25 apple varieties are produced commercially 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 Apple Production for Top 10 Varieties in Thousand MT



F = forecast
Source: FAS/EU based on World Apple and Pear Association data

Apples - Non-commercial Production

Non-commercial production in MY 2019/20 is estimated to have decreased by 54 percent compared to the abundant MY 2018/19 harvest. Non-commercial production tends to alternate between good and poor crop years. As a result, the decrease is most pronounced in those countries that showed the largest production in MY 2018/19, namely Germany, Austria, Romania, Poland, Slovenia, and the Czech Republic. However, most EU MS 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. In MY 2019/20, non-commercial production represents about 7 percent of total apple production, compared to 12 percent in the previous MY.

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 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 World Apple and Pear Association (WAPA), EU apple stocks amounted to 564,169 MT on July 1, 2019, compared to 152,891 MT at the same time in 2018. In some MS the stock number comprised of apples stored at POs while in other MS 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 MS 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 UK and Germany) or reduce fresh fruits consumption altogether (for example in Spain). In the UK, concerns about food waste has made consumers more careful in the amounts of perishable food they buy. Also, the "buy local" trend is especially pronounced in the UK. Two out of five fresh apples consumed in the UK are locally grown and the British apple industry aims at increasing this share to three in five by 2030.

Apples - Processing

In MY 2019/20, processing use of apples is expected to decrease by 42 percent compared to MY 2018/19 representing a return to more normal levels. This is largely due to the decline in domestic non-commercial production.

Processing uses for apples include, among others, apple juice, concentrated apple juice, cider, wine/brandy, apple sauce, preserves, canning, apple chips, and peeled apples for bakeries. The share of apples used for processing varies significantly by MS, 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 average share of apples going into processing is forecast to amount to about 31 percent of total supply in MY 2019/20 compared to 40 percent in the previous MY. Major MS with apple processing include (in order of descending volume) Poland, Germany, Hungary, Italy, Romania, France, Austria, Spain, the UK, and the Czech Republic.

Apples – Trade

The majority of trade occurs among the EU countries. Over the past five years, on average about 2.3 million MT of apples were traded between EU MS, while roughly 400,000 to 530,000 MT were imported from outside the EU. In recent years imports from outside the EU contributed between 3 and 5 percent of the total EU apple supply.

EU external trade

Apples - Imports

In MY 2018/19, more than 75 percent of EU 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 UK and the Netherlands, who together account for 55 percent of the EU imports. However, much of the volume entering the Netherlands is not consumed there but is transshipped to other MS.

Imports from the United States to the EU occur year-round, albeit at a low level. The reduction of the EU MRL for DPA in March 2014 (see note in policy section) has substantially reduced U.S. apple exports to the EU as only exporters with designated DPA-free facilities are able to ship. The majority of U.S. apples exported to the EU are going into the UK and consist of organic apples. The Netherlands, Spain, and Italy also imported apples from the US in MY2018/19, albeit in negligible amounts.

EU Imports of Apples in MT

	MY 2016/17	MY 2017/18	MY 2018/19	Change MY 2018/19 To MY 2017/18	% of Total Imports in MY 2018/19
Chile	119,117	158,553	148,975	-6%	30%
New Zealand	123,204	135,556	127,703	-6%	26%
South Africa	87,703	109,689	92,132	-16%	19%
Macedonia	15,172	9,964	43,280	334%	9%
Brazil	18,403	28,314	26,161	-8%	5%
Argentina	15,774	24,400	18,129	-26%	4%
Ukraine	1,333	11,588	10,699	-8%	2%
Serbia	27,751	24,858	9,032	-64%	2%
Albania	4,705	1,410	5,770	309%	1%
Uruguay	4,348	3,497	2,278	-35%	0.5%
United States	**2,295**	**5,330**	**2,206**	**-59%**	**0.5%**
Switzerland	560	275	1,729	529%	0.4%
Australia	1,361	1,532	1,135	-26%	0.2%
Bosnia & Herzegovina	513	2,201	1,028	-53%	0.2%
China	944	2,303	829	-64%	0.2%
Moldova	413	7,311	651	-91%	0.1%
Turkey	38	1,507	562	-63%	0.1%
Other	1,497	1,935	1,043	-46%	0.2%
World total	**425,131**	**530,223**	**493,342**	**-7%**	**100%**

Source: Global Trade Atlas (GTA) accessed September 2019

Apples - Exports

In MY 2019/20, EU apple exports are forecast to decrease by about 200,000 MT (translating into -17 percent) following the large decline in domestic production. As a result, U.S. apple exporters could find additional market opportunities in countries where they previously saw strong EU competition, especially from apples originating in Poland and Italy.

In MY 2018/19, exports were 17 percent higher than in the previous marketing year as a result of that year's bumper harvest leading to cheaper apples.

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, Belgium, Germany, and Greece are already exporting to India. Since the start of the pre-clearance program in October 2014, Italy and France are eligible for export to the United States. In MY 2018/19, France exported 21 MT to the United States. Poland has concluded agreements with Vietnam and a number of other Asian countries.

The top destinations for EU apples in MY 2018/19 were Egypt, Belarus, Kazakhstan, Saudi Arabia, and India. The five largest EU exporters, together accounting for 93 percent of EU apples exports, were Poland (mostly to Belarus, Egypt, Kazakhstan, Jordan, and India), Italy (to Egypt, Saudi Arabia, India, and Norway), France (mainly to UAE, Saudi Arabia, Thailand, Vietnam, and Qatar), Greece (mainly to Egypt, Jordan, and Saudi Arabia), and Spain (mostly to Morocco, Mauritania, and Brazil)

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

Market	**EU Countries Competing with U.S. Apple Exports**
Saudi Arabia	Italy, France, Spain
UAE	France, Italy, Greece, Spain
India	Italy, Poland, Belgium, France, the Netherlands, Spain

Apples – Withdrawal from Market

Normally, the EU does not offer withdrawal from market/ market intervention programs for apples (see paragraph below). However, in 2014 and in reaction to the Russian ban of fruit import from the EU, the European Commission introduced temporary exceptional market support programs for the sector. When Russia prolonged its import ban, the EU extended the temporary measures. They expired on June 31, 2018 (see policy section). These measures included non-harvest, green harvest and destruction, and donations to charities (e.g. kindergartens, food banks, hospitals and prisons). However, the use of market withdrawal measures was minimal in MY 2017/18 due to the lower EU apple production. Only the Netherlands saw some withdrawals but only on a low level. In MY 2016/17, withdrawal measures were applied by Poland, Belgium, the Netherlands, and Croatia.

Classic intervention (also called "withdrawal from market") is no longer available as a separate EU measure since the 2008 reform of the EU common market organization for fruits and vegetables (see policy section). Instead, intervention may be included as an emergency measure in the POs operational programs. This means, the system moved from being financed entirely by EU funds to a co-financing system where producer organizations have to bear 50 percent of the costs.

Apples – Additional Information

For information on tariffs, maximum residue levels, and labeling requirements please see the report's policy section.

Pears, Fresh

Coordinated by Marcel Pinckaers/FAS The Hague

PSD Pears, Fresh

Pears, Fresh	2017/2018		2018/2019		2019/2020	
Market Begin Year	Jul 2017		Jul 2018		Jul 2019	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	118,557	118,090	118,748	116,054	0	116,677
Area Harvested	111,467	111,856	111,556	111,289	0	111,655
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	2,276,237	2,273,285	2,367,358	2,398,917	0	2,078,575
Non-Comm. Production	110,159	110,980	157,600	192,889	0	105,900
Production	2,386,396	2,384,265	2,524,958	2,591,806	0	2,184,475
Imports	198,500	199,271	200,000	168,467	0	180,000
Total Supply	2,584,896	2,583,536	2,724,958	2,760,273	0	2,364,475
Fresh Dom. Consumption	1,959,302	1,953,796	2,087,245	1,897,558	0	1,895,971
Exports	344,800	344,665	320,000	310,582	0	218,504
For Processing[1]	280,794	285,075	317,713	552,133	0	250,000
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	2,584,896	2,583,536	2,724,958	2,760,273	0	2,364,475
(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 for MY 2017/18 and 2018/19: GTA accessed in September 2019; All other: FAS/EU estimates

Pears – Production

Pears – Commercial Production

Italy (25 percent of total EU production in MY 2019/20), the Netherlands (18 percent), Belgium (15 percent), Spain (15 percent), and Portugal (8 percent) lead pear EU production. Together these western European countries represent 80 percent of total EU commercial production. Between 2011 and 2014, the EU's total area harvested dropped by three to four percent per year. However, the total EU area harvested has stabilized over the last four years - roughly 112,000 hectares (with similar levels expected for this year).

MY 2019/20 EU commercial pear production is forecast to drop by 13 percent (or 320,000 MT) compared to MY 2018/19. Except for the Iberian Peninsula and the Czech Republic, pear production is forecast to decline in all EU MS. The 30 percent decrease in pear production in Italy, however, has the biggest impact on total EU production.

[1] This field also includes pears not suitable for either animal or human consumption (for example loss).

Emilia-Romagna continues to be Italy's main pear producing area accounting for almost three-quarter of Italy's total pear production. For the past few years, the planted acreage of pears dropped by two to three percent per year in this area. However, acreage is expected to stabilize in MY 2019/20 at 31,000 hectares of pear orchards. *Abate Fetel* continues to be Italy's leading variety, followed by *William Bon Crétien/Bartlett*, *Conference,* and *Coscia-Ercollini*. Production is estimated at 511,000 MT, down 30 percent when compared to the past two MY. Heavy rains and unfavorable temperatures in the early growing season negatively affected fruit setting, the process in which flowers become fruit and potential fruit size is determined. As a direct result, Italian pears are expected to be smaller than in recent years. Hailstorms that hit Italy do not seem to have negatively impact production since many orchards are protected with hail nets. However, unusually high temperatures in the growing season, favored the spread of the brown marmorated stink bug (*Hapyomorpha Halys*). Due to insect consumption, a lot of the pears are damaged and deformed. Only pear orchards with anti-insect nets were able to protect their production from the pest. Finally, the spread of Alternaria, a genus of ascomycete fungi, led to increased fruit rot.

The planted acreage of pears continued to grow in the Netherlands and is expected to pass ten thousand hectares this year (10,101 hectares). Dutch pear production (mainly *Conference* pears) is estimated to be down by six percent compared to last year. Fewer pears per tree were produced predominantly due to the relative cold temperatures during flowering. The lack of rain and short heatwaves between the end of June and late September had, on the other hand, no significant impact on Dutch pear production. The latter also did not result in sunburn. The taste is expected to be good due to the abundance of sun while the size, color, keeping quality are also expected to be good this year, especially for pears from irrigated orchards.

Planted pear area continues to increase, not only in the Netherlands but also in Belgium, and now totals 10,354 hectares. Belgian pear production (mainly *Conference* pears) is concentrated in Flanders and expected to be down by 36,000 MT, or 10 percent, mainly due to hailstorms and some sunburn. The lack of rain, in combination with short heat waves, is expected to negatively influence the size of Belgian harvested pears. Most Belgian growers are unable to irrigate their orchards because of their inability to access ground and surface water, like their counterparts in the south of the Netherlands, which results in smaller sized pears. The color and the keeping quality are expected to be average-to-good this year.

EU Commercial Pear Production by Country and Year in MT

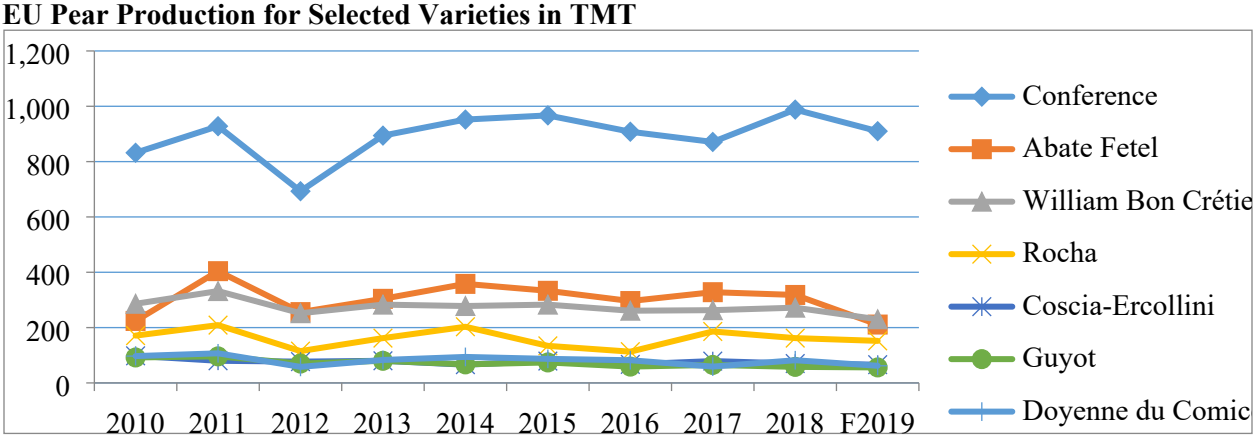
	MY 2016/17	MY 2017/18	MY 2018/19	MY 2019/20	Change 2019:2018 in Percent	Percent of Total EU Production in 2019
Italy	681,000	738,000	730,000	511,000	-30	25
Netherlands	370,000	330,000	402,000	379,000	-6	18
Belgium	313,000	302,170	358,000	322,000	-10	15
Spain	345,655	356,957	294,000	307,248	5	15
Portugal	111,020	184,000	160,000	160,000	0	8
France	129,000	130,000	130,000	127,000	-2	6
Greece	66,197	73,246	80,096	72,000	-10	3
Poland	75,500	50,100	85,000	67,000	-21	3
Germany	34,625	23,386	47,644	37,000	-22	2
United Kingdom	27,000	23,000	23,000	23,000	0	1
Other	68,650	62,426	89,177	73,327		4
Total Production	**2,221,647**	**2,273,285**	**2,398,917**	**2,078,575**	**-13**	**100**

Source: FAS/EU

Pear production in Spain is expected to increase by almost 5 percent this MY, to 307,000 MT due to favorable weather conditions throughout the growing season, and the size and taste are expected to be good. Catalonia continues to be Spain's leading pear producing region, responsible for 40 percent of total production, followed by Aragon, La Rioja, and Murcia. 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). Now the area harvested has leveled off at just over 21,000 hectares.

MY 2019/20 pear production in Portugal is expected to be similar to last year's production. Weather conditions during the growing season were favorable for the unique Portuguese *Rocha* pear variety. The area harvested has been stable for a couple of years at 12,500 hectares.

EU Pear Production for Selected Varieties in TMT



F = forecast
Source: WAPA data

In MY 2018/19, almost 45 percent of all pears grown in the EU were *Conference* pears, mainly grown in Belgium, the Netherlands, and Spain. Other popular varieties include *William Bon Crétien/Bartlett* (grown in Italy, Spain, and France), *Abate Fetel* (grown in Italy), 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*. Club varieties are varieties that are patented and trademarked to protect the owner's intellectual property rights.

Pears – Non-Commercial Production

Non-commercially produced pears include pears grown in house gardens and meadows. If they are harvested, these pears are predominantly for domestic use (both fresh consumption and processing). Austria, Czech Republic, Romania, and Slovenia have non-commercial production figures of roughly 50 percent or more of their total pear production. MY 2019/20 non-commercial pear production is estimated to be almost half of last year's high of 193,000 MT. Last year's high production volumes were the result of high production numbers of pears in Austria. This year's EU production volume is similar to what was produced in MY 2017/18 and MY 2016/17.

Pears – Consumption

The per-capita consumption of pears fluctuates slightly from year to year depending on availability and price. The average per-capita consumption of pears in the EU is estimated between 3.5 and 4 kg per year. The highest per-capita consumption can be found in the leading pear producing countries. For example, Italy has the highest per-capita consumption with almost 10 kg per year, followed by Portugal, the Netherlands, Greece, Spain, and Belgium. The lowest per-capita consumption markets in the EU, 2 kg per year or less, are Hungary, Slovakia, Poland, and Lithuania. In MY 2019/20, EU consumption of fresh pears is expected to remain unchanged (despite an expected increase in prices) because EU consumer demand is relatively inelastic.

Within the EU MS, the most popular pear varieties are often those that are grown regionally. Food retailers, on average, offer two or three different pear varieties. Taste, appearance, texture, and price are the main consumer considerations when buying pears. There is a trend, especially among consumers in Northwest Europe, however, towards preferring somewhat smaller-sized pears. Additionally, the demand for organic and local pears continues to grow. This is especially true in large organic consumer markets like Switzerland, Denmark, Sweden, Luxembourg, and Austria.

Processing

EU growers primarily produce their 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 processing (for instance by the canning, juice, and baking industry). Pears not suitable for human consumption (both fresh and further processing) are used for animal feed or fermenting. Prices for fresh pears also influence the volume used for processing.

In MY 2018/19, a high number of pears were used for processing due to increased processing in Italy, Austria, Belgium, the Netherlands, and Poland. In MY 2019/20, however, it is expected that the volume of pears used for processing will drop by half. Given the small harvest and expected higher prices, pears that normally would be processed will now be offered for fresh consumption. Italy, Spain, Poland, and Austria have the highest processing numbers, and their combined volumes account for two-thirds of total volume of processed pears in the EU. An estimated quarter of Italy's pear production is expected to be processed (most of which will be bought by the Italian juice industry). Austria saw high processing numbers last year (94,000 MT) due to a large non-commercial crop that year. For MY 2019/20, Austria only expects to process 27,000 MT as a direct result of a much lower non-commercial pear production. In Austria, the majority of these pears will be used for producing Perry (or pear cider), an alcoholic beverage made from fermented pears. In other countries, such as Spain and Poland, pears are also processed into fruit jelly and used by the canning industry.

Pears – Trade

EU External Trade

Imports

Imported pears represent less than 10 percent of the total EU pear supply, and normally end up in the EU's fresh market. The table below demonstrates that the EU mainly imports pears from Southern Hemisphere countries such as South Africa, Argentina, and Chile. Imports 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*.

The Netherlands and Italy together account for two-thirds of EU pear imports. The majority of the pears that are imported via the port of Rotterdam in the Netherlands (42 percent of EU pear imports), are re-exported to other MS like Germany, the UK, Belgium, and France.

The number of pears imported in MY 2018/19 was again lower than the year before. Historically, the EU exported both domestically produced and imported pears. Now, Russia and several other former EU export markets import directly from Southern Hemisphere countries. As a result, EU pear imports have dropped by a third since 2014. Although EU pear production will decline this year, total EU pear imports are not expected to increase as more EU pears will end up on the fresh market this year and less in processing (as previously noted).

EU Import of Pears in MT

Country of Origin:	*MY 2016/17	*MY 2017/18	MY 2018/19	% Change MY 2018/19 to MY 2017/18	% of Total EU Imports
South Africa	88,069	77,213	68,560	-11	41
Argentina	46,543	53,354	42,070	-21	25
Chile	56,698	46,020	39,313	-15	23
China	11,149	12,985	8,735	-33	5
Turkey	1,831	5,989	5,201	-13	3
Bosnia & Herzegovina	842	554	1,501	+171	1
Serbia	675	1,476	1,342	-9	1
Uruguay	1,679	387	949	+145	0
New Zealand	413	434	236	-46	0
Switzerland	61	56	222	+294	0
Brazil	0	24	94	+300	0
Belarus	101	65	77	+18	0
Korea, South	84	140	64	-54	0
Israel	66	0	38	∞	0
Afghanistan	0	0	23	∞	0
United States	**24**	**158**	**2**	**-99**	**0**
Other	48	416	40		0
Total	**208,577**	**199,271**	**168,467**	**-5**	**100**

Source: Global Trade Atlas accessed in September 2019, FAS/EU
*revised numbers

China is the EU's fourth largest supplier of pears and exports mainly *Asian* pears, including the popular *Ya* variety, which is predominantly consumed by the Asian population in the EU. Despite a rebound in MY 2017/18 (158 MT), imports of pears from the United States fell to a record low in MY 2018/19 (2 MT), predominantly due to the EU's strict maximum residue levels for pesticides.

Exports

With former export markets now buying directly from Southern Hemisphere countries, EU pear exports are largely made up of pears produced in the EU. Pear exports have been stable at slightly over 300,000 MT for the past four MYs, except in MY 2017/18, when pear exports were higher due to the sufficient availability of good-quality pears produced within the EU. MY 2019/20 pear exports, however, are expected to be down by 25 percent due to the drop in this year's production.

Belarus continues to be the largest export market for EU pears. In addition, Kazakhstan, Georgia, and Ukraine are important markets for *Conference* pears, especially those produced in Belgium and the Netherlands. With lower production levels in these MS, EU exports to the afore mentioned countries are, in turn, expected to be down in MY 2019/20. EU pear exports to mature markets such as Norway and Switzerland are expected to only fall slightly compared to last Marketing Year.

Pear exports to Brazil dropped by nearly 25 percent in MY 2018/19 due to reduced pear production in Portugal.[2] With an expected similar harvest this MY, exports to Brazil are expected to remain flat. Exports to Morocco, a popular destination for Portuguese Rocha pears, are expected to remain unchanged.

Trade with Hong Kong continues to fall while pear exports to China grew by over 50 percent in MY 2018/19 (totaling 5,000 MT). While still a relatively new market, China has become the seventh largest export market for EU pears. Despite the decrease in production, exporters are expected to continue to focus on this important market which is why industry sources expect exports to China continue to grow in MY 2019/20.

EU Export of Pears in MT

Country of Destination:	*MY 2016/17	*MY 2017/18	MY 2018/19	% Change MY 2018/19 to MY 2017/18	% of Total EU Exports
Belarus	148,968	130,919	117,239	-10	38
Brazil	43,257	63,130	48,223	-24	16
Morocco	21,219	40,885	39,258	-4	13
Norway	17,012	17,274	15,811	-8	5
Kazakhstan	8,483	11,660	12,961	+11	4
Bosnia & Herzegovina	10,434	10,729	10,592	-1	3
China	3,253	5,071	7,711	+52	2
Switzerland	6,284	11,519	6,039	-48	2
Saudi Arabia	5,145	7,572	4,817	-36	2
Israel	3,738	3,457	4,594	+32	1
Libya	2,255	2,745	4,015	+46	1
Georgia	317	292	2,983	+921	1
Serbia	4,409	2,959	2,849	-4	1
Canada	1,623	2,726	2,712	-1	1
Ukraine	1,940	1,540	2,701	+75	1
Other	29,883	32,187	28,077		9
Total	**308,220**	**344,665**	**310,582**	**-10**	**100**

Source: Global Trade Atlas accessed in September 2019, FAS/EU
*revised numbers

Due to the existing Russian import ban and uncertainty regarding the UK leaving the EU (Brexit), EU pear producers want to not only grow existing markets, but also look for new markets in Asia, the Middle East, and the Americas. Even when these new markets open, it will take several years to develop a sustainable market, especially for varieties that are unknown to these consumers.

[2] Portugal's grown *Rocha* pears are popular in Brazil.

Pears – Prices

Producer prices for pears are expected to be up this year. Higher prices will be driven by a decrease in pear production throughout the EU in combination with the opening and growing importance of new export markets for EU pears.

Pears – Withdrawal from Market

As described in the policy section, the Commission introduced specific market support measures for the European fruit and vegetable sector since the start of the Russia ban in 2014 until 2017. The last emergency measure for fruit and vegetables was 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 MMT of withdrawals from the market. More detailed information on this issue can be found in the policy section.

Pears – Additional Information

For information on tariffs, maximum residue levels, and labeling requirements, please see the respective policy section at the beginning of this report.

Table Grapes

Coordinated by Ornella Bettini/FAS Rome

PSD Table Grapes

Grapes, Fresh	2017/2018		2018/2019		2019/2020	
Market Begin Year	Jun 2017		Jun 2018		Jun 2019	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	97,446	95,749	97,450	95,419	0	95,190
Area Harvested	92,140	90,438	92,190	89,754	0	89,645
Commercial Production	1,442,063	1,436,583	1,545,000	1,585,933	0	1,365,000
Non-Comm. Production	11,297	11,300	11,500	11,000	0	10,500
Production	1,453,360	1,447,883	1,556,500	1,596,933	0	1,375,500
Imports	684,797	687,173	688,000	681,499	0	690,000
Total Supply	2,138,157	2,135,056	2,244,500	2,278,432	0	2,065,500
Fresh Dom. Consumption	2,059,445	2,056,377	2,166,000	2,199,625	0	1,987,000
Exports	78,712	78,679	78,500	78,807	0	78,500
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	2,138,157	2,135,056	2,244,500	2,278,432	0	2,065,500
(HA), (MT)						

Sources: Trade for MY 2017/18 and 2018/19: GTA accessed in September 2019; All other: FAS/EU estimates

Table Grapes – Commercial Production

The EU is a world leader in table grape production with Italy, Spain, and Greece accounting for approximately 92 percent of the total EU production. In MY 2019/20 (June/May) EU table grape commercial production is forecast to drop by 14 percent from the previous campaign, mostly due to volume decreases in Italy, down 25 percent, where heavy rains occurred during May flowering. Production decreases are also forecast in Romania (down 12 percent) and Greece (down 1.4 percent). Conversely, increased quantities are forecast in France (up 10.3 percent), Bulgaria (up 9.2 percent), and Portugal (up 1.2 percent). Volumes in Spain are expected to remain flat. Overall, fruit quality is forecast to be good with higher sugar content due to hot temperatures in July, August, and September. MY 2019/20 EU table grape area is forecast to keep a downward trend due to a reduced sector profitability and a stagnating domestic consumption.

Italy is the leading table grape producer in the EU, followed by Spain and Greece. 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; Tyrnavos in Thessaly; and Heraklion on the island of Crete. *Sultana* (*Thompson Seedless*) and *Victoria* are the leading varieties, with *Crimson Seedless* and *Superior Seedless* gaining popularity. 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 the last two years, new varieties were planted replacing older varieties. 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. *Apirena* (Crimson seedless, Superior seedless, and Flame seedless), *Aledo, l, Muscatel, Red Globe*, are the main ones. *Apirena* seedless varieties represent 40 percent of the domestic production and are mainly cultivated in the region of Murcia and Alicante. Spain is the major EU producer of seedless table grapes with increasing interest in export markets.

EU Commercial Table Grape Production by Country and Year in MT

COUNTRY	MY 2017/18	MY 2018/19	MY 2019/20e	% change 2019/20 - 2018/19	% of total production in 2019
Italy	750,000	850,000	635,000	-25	46.5
Spain	266,970	309,870	310,000	0	22.7
Greece	311,123	294,183	290,000	-1.4	21.2
Romania	38,700	61,400	54,000	-12	4
France	35,200	40,800	45,000	10.3	3.3
Portugal	21,740	17,780	18,000	1.2	1.3
Bulgaria	12,850	11,900	13,000	9.2	1
Total	**1,436,583**	**1,585,933**	**1,365,000**	**-14**	**100**

e= estimated
Source: FAS/EU

Table Grapes – Non Commercial Production

EU table grape non-commercial production includes table grapes grown in home gardens, meadows, or field edges. MY 2019/20 EU table grape non-commercial production is forecast to decrease by 4.5 percent compared to the previous campaign due to lower volumes in Romania (down 10 percent), not compensated by increased quantities in Bulgaria (up 50 percent) but not reaching the level of MY 2017/18.

Table Grapes – Consumption

EU fresh grape consumption is forecast to decrease by 9.7 percent in MY 2019/20 compared to MY 2018/19, driven by Italy's decreased production. Starting in June and throughout the end of the calendar year, the EU 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 remains the leading table grape consumer in the EU, followed by Germany, the UK, Greece, Spain, France, Romania, Czech Republic, Portugal, Austria, Bulgaria, Slovakia, Croatia, and Slovenia. Despite the fact that Italian seeded grapes are still greatly appreciated, EU consumers are increasingly demanding seedless varieties (*Sugraone, Crimson, Thompson*, *Regal*, *Summer Royal*, *Centennial*, *Sublime*, etc.).

Table Grapes – Trade

Imports

The EU is a net importer of fresh table grapes. MY 2019/20 EU table grape imports are forecast slightly up, compensating a reduced domestic production. During MY 2018/19, EU table grape imports remained flat from the previous campaign; reduced quantities from Turkey (down 38 percent), Egypt (down 31 percent), and Chile (down 21 percent) were compensated by increased volumes from Peru (up 59 percent), India (up 27 percent), and Brazil (up 9 percent). South Africa, India, Peru, and Chile were the leading suppliers, accounting for 30, 17, 15, and 13 percent of total imports, respectively. The largest EU importing countries remain the Netherlands, Germany, and the United Kingdom. These are followed by France, Spain, Belgium, Austria, and Italy. The Netherlands serves mainly as a trans-shipping point.

EU Imports of Table Grapes in MT

COUNTRY	MY 2016/17	MY 2017/18	MY 2018/19	% change 2018/19-2017/18	% of total imports in 2018/19
World	648,722	687,173	681,499	-0.83	100.00
South Africa	213,830	205,606	202,379	-1.57	29.70
India	94,680	90,239	114,801	27.22	16.85
Peru	62,943	63,273	100,641	59.06	14.77
Chile	109,331	111,222	88,263	-20.64	12.95
Egypt	49,598	76,440	52,848	-30.86	7.75
Brazil	28,420	34,887	38,188	9.46	5.60
Namibia	20,037	25,084	25,502	1.67	3.74
Turkey	31,398	39,683	24,381	-38.56	3.58
Moldova	12,313	20,471	16,537	-19.22	2.43
Morocco	6,851	6,419	6,458	0.60	0.95
Macedonia	10,632	3,965	5,325	34.30	0.78
United States	**4,374**	**5,005**	**2,091**	**-58.22**	**0.31**
Bosnia & Herzegovina	543	1,007	973	-3.31	0.14
Argentina	542	727	849	16.75	0.12
Israel	663	773	489	-36.70	0.07
Lebanon	673	501	300	-40.20	0.04
Mexico	1,470	1,587	299	-81.19	0.04
Iran	-	-	216	∞	0.03
Serbia	25	43	192	344.93	0.03
Other	399	241	767	218.25	0.12

Source: Global Trade Atlas (GTA) accessed in September 2019

Exports

MY 2019/20 EU table grape exports are forecast to reduce from the previous campaign as a result of the decreased production, coupled with high transportation costs and discouraging bureaucratic delays. During MY 2018/19, EU table grape exports remained flat from the previous campaign; reduced quantities to Belarus (down 27 percent), Switzerland (down 10 percent), and United Arab Emirates (down 3 percent) were compensated by increased volumes to Ukraine (up 52 percent), Albania (up 50 percent), South Africa (up 17 percent), and Norway (up 9 percent). Switzerland and Norway confirmed to be the leading destinations, accounting for 34 and 19 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. Iberian Peninsula recently opened the Chinese market for table grapes.

EU Exports of Table Grapes in MT

COUNTRY	MY 2016/17	MY 2017/18	MY 2018/19	% change 2018/19-2017/18	% of total exports in 2018/19
World	86,325	78,679	78,807	0.16	100.00
Switzerland	29,731	29,825	26,904	-9.79	34.14
Norway	13,531	13,881	15,158	9.20	19.23
South Africa	2,715	2,800	3,270	16.79	4.15
Albania	2,390	2,138	3,217	50.47	4.08
United Arab Emirates	5,405	2,971	2,868	-3.46	3.64
Belarus	5,538	3,644	2,656	-27.13	3.37
Russia	4,178	2,172	2,549	17.37	3.23
Ukraine	1,912	1,589	2,424	52.57	3.08
Bosnia & Herzegovina	2,416	2,113	2,323	9.93	2.95
Saudi Arabia	3,444	2,194	1,796	-18.15	2.28
Canada	468	1,005	975	-3.04	1.24
Qatar	494	831	846	1.92	1.07
Oman	370	781	759	-2.80	0.96
Iceland	742	970	758	-21.83	0.96
Kosovo	584	480	712	48.30	0.90
United States	**791**	**712**	**712**	**-0.07**	**0.90**
Serbia	470	471	652	38.48	0.83
Sri Lanka	912	655	630	-3.84	0.80
Malaysia	351	411	620	51.07	0.79
Other	9,883	9,036	8,978	-0.64	11.4

Source: GTA accessed in September 2019

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

Trade fairs play a key role in presenting new products to the trade or in finding additional buyers and importers. The most important trade shows related to the fruit and vegetable sectors are:

FRUIT LOGISTICA Berlin, Germany (Interval: yearly) Target Market: Germany/EU/Central & Eastern Europe The leading European trade show for fresh and dried fruit, nuts, and related products http://www.fruitlogistica.de	Next Fair: February 5-7, 2020

FRUIT LOGISTICA is the major trade show for fresh and dried fruits in Europe. The next show will take place on **February 5-7, 2020.** More than 2,400 companies from across the entire fresh produce value chain will participate, including major global players as well as small and medium-sized suppliers from around the world.

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 12-15, 2020

BIOFACH is one of the most important trade shows for organic products in Europe. The next show will take place on **February 12-15, 2020.**

Related Reports

For related reports please search the USDA/FAS GAIN database:
https://gain.fas.usda.gov/#/search

Attachments:

No Attachments