EUROPÊCH ' 2020

EUROPEAN CROP FORECASTS

PEACH/NECTARINE/ABRICOT

FIRST TRENDS as of 07 May 2020

European harvest forecasts Peach/Nectarines/Pavia 2020
First trends as of 07 May

Greece

This year, Greek production of peaches and nectarines seems normal, without any decrease in quantities.

After a mild, dry winter, rain came in March and during the flowering period.

Towards mid-March a frost episode (-3°C) affected the very early flowering varieties without too much damage at the global level.

The bad weather continued with rains and low temperatures until mid-April.

This climate has resulted in a season 7-8 days later than last year.

As far as volumes are concerned, they appear to be close to those of 2019 but this will need to be confirmed by mid-May.

Another serious problem this season is the seasonal workforce. Seasonal workers from Albania, because of the coronavirus, cannot return to work in Greece and if a solution is not found it will be a serious problem.

To conclude, we see that the peach orchard areas seem to be decreasing because of the low prices obtained by producers over the last 3 years.

On the other hand, the nectarine potential remains stable and even increases a little, because this product is better valued on the markets.

The flat peaches remain at the same level with very limited volumes and the pavers also remain stable.

Producers are also facing delays in insurance payments due to the climatic problems encountered in past years. Cash flow is at a low ebb and producers do not have sufficient resources to make the necessary crop advances.

Spain

The number one problem mobilising Spanish producers this year is the problem of labour availability in the context of COVID 19. Indeed, some regions such as Aragon and Catalonia call upon a large foreign workforce that is not currently available. Spanish professionals are asking their government to put in place measures to allow workers from the Schengen area and Romania to come and in many cases return to the farms and packing stations as some European countries have done (Germany, United Kingdom, Ireland...). These labour-related problems, combined with security measures, will generate additional production costs of between 20% and 30% both in the orchard and in the packing station.

In Catalonia, due to the frost at the beginning of spring, damage occurred to the fruit, both as a result of direct losses (frozen and fallen fruit) but also as a result of a subsequent penalisation of the development of the fruit. This impact is irregular in the Lleida area (the areas most affected are those closest to rivers and lowlands). There has been an affectation in all subspecies, although the most affected are nectarines and flat peaches, both at the beginning and in the middle of the season.
In addition to climatic conditions, the areas grubbed up since 2019 must also be taken into account. Crop forecasts are currently being evaluated and, although no figures are available (fruit is still falling), the first evaluation indicates a decrease in the crop compared to last year.

Italy

The 2019 production of peaches, pavia and nectarines in Italy was respectively 534 000 tonnes of peaches, (+6% compared to 2018 which was in deficit), 608 000 tonnes of nectarines (+6% compared to 2018) and almost 92 000 tonnes of pavia peaches (+28% compared to 2018). Last year, supply was at a good level across the country, but production was penalized by several hailstorms that reduced the quantities destined for the fresh market.

The winter that has just ended was very mild and in March we had a period of good weather characterized by above-normal temperatures, which generated in the North an early, normal flowering without any particular problems and a very long flowering in the southern regions.

Unfortunately in late March and early April, repeated frosts penalized productivity for peaches and nectarines.

Crops in the northern regions are significantly affected, with a notable impact in Emilia-Romagna, and those in Veneto and Piedmont are less compromised. Frost damage has also been reported in some regions of southern Italy, particularly in Campania, but the central and southern production areas show a much more limited frost problem than in the north.
At the production level, estimates for 2020 are still being prepared, so it is not possible today to speak of precise estimates.

In the southern regions, production in 2020 is expected to be slightly lower than in 2019. On the other hand, the drop in production in the northern regions would appear to be more significant, due to the reduction in area and limited yields due to frost.
Currently, southern regions seem to be showing a harvest period similar to last year, while in northern Italy, the harvest is currently a few days ahead of schedule.
With regard to surface areas, the downward trend in Italy, which has been continuing for several years, will be confirmed in 2020, with decreases in the main production areas, caused by grubbings not compensated by new investments.
For 2020, the areas in full production are estimated in Italy, as a total species (peaches + pavies + nectarines) at just over 51,000 hectares, -5% compared to last year.

France

Although peach orchards were subjected to the same complicated climate in the winter of 2019/2020 as apricot orchards, the impacts were less significant.

Peach and nectarine varieties seem to be better able to withstand the lack of winter cold and even the excessive temperatures experienced this winter.

And the frosts have affected production basins that weigh less in peach nectarine than in apricot, hence also a lesser impact there (Rhone Valley, Vaucluse...).

In nectarine peaches, the overall flowering is often average, with low thinning needs behind. On early varieties that usually require high levels of thinning, the load will be normal, but on the other hand, on seasonal or late varieties that are thinned little or not at all, there may be a load deficit.

This low thinning and load deficit in some cases should logically generate calibres with a tendency rather higher than normal.

Producers also hope not to experience the strong imbalance of the 2019 campaign and to offer standard volumes and sizes from the start of the harvest in mid-June and not to experience oversupply at the end of the season as last year.

In terms of area development, after a regular drop in French production potential, a renewal of the French orchard has been observed over the last 2-3 years, with a renewal rate of 7 to 8% for PDO peach nectarine enterprises.

The good economic results of the last 3 years, a better control of Sharka's households and a more complicated situation for the apricot sector are not unrelated to this evolution.

With the participation of

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