EUROPÊCH'   2020

SUMMARY OF THE EUROPEAN HARVEST 2019

HARVEST FORECAST 2020 :

ABRICOT

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SUMMARY OF THE EUROPEAN HARVEST

Apricot 2019

Unit: tons.

	Total production Apricot
ITALY	**307 303**
Emilia Romagna	*107 144*
Southern Italy / Sicily / Sardinia	*169 475*
Other Italy	*30 684*
GREECE	**90 700**
Peloponnese / Sterea / Crete	*42 500*
Macedonia / Other Regions	*48 200*
SPAIN	**110 233**
Valencia	*4 000*
Murcia	*60 000*
Aragon	*24 208*
Castilla la Mancha	*4 000*
Other Spain	*18 025*
FRANCE *	**132 216**
Languedoc-Roussillon	*45 800*
Rhône-Alpes	*66 150*
P.A.C.A.	*20 266*
TOTAL EUROPE 2019	**640 452**

*** sum of 3 regions**

EUROPE

Forecasts Apricot 2020

Unit: tons.

	Total Apricot production
Italy	136 101
Greece	78 500
Spain	93 740
France	93 542
TOTAL EUROPE 2020	**401 883**

2019 PRODUCTION	640 452
AVERAGE for 2014-2018	554 384

VARIATION 2020/2019	**- 238 569**
	- 37%
VARIATION 2020 / Average 2014-2018	**- 152 501**
	- 28%

<u>GREECE</u>

Apricot Forecasts 2020

Unit: tons.

	Total production Apricot
Peloponnese / Sterea / Crete	45 400
Macedonia / Other Regions	33 100
TOTAL GREECE 2020	**78 500**

2019 PRODUCTION	90 700
AVERAGE 2014-2018	63 740

VARIATION 2020/2019	**- 12 200**
	- 13%
VARIATION 2020 / Average 2014-2018	**+ 14 760**
	+ 23%

SPAIN

Forecasts Apricot 2020

Unit: tons.

	Total Apricot production
Valencia	4 400
Murcia	45 000
Aragon	18 055
Castilla la Mancha	12 000
Catalonia	8 677
Other Spain	5 608
TOTAL SPAIN 2020	**93 740**

2019 PRODUCTION	110 233
AVERAGE 2014-2018	121 276

VARIATION 2020/2019	**- 16 493**
	- *15%*
VARIATION 2020 / Average 2014-2018	**- 27 536**
	- *23%*

ITALY

Forecasts Apricot 2020

Unit: tons.

	Total Apricot production
Emilia Romagna	11 036
Southern Italy / Sicily / Sardinia	111 074
Other Italy	13 991
TOTAL ITALY 2020	**136 101**

2019 PRODUCTION	307 303
AVERAGE 2014-2018	228 134

VARIATION 2020/2019	**- 171 202**
	- 56%
VARIATION 2020 / Average 2014-2018	**- 92 033**
	- 40%

FRANCE

Forecasts Apricot 2020

Unit: tons.

	Total production Apricot
Languedoc Roussillon	31 060
Rhone Alps	50 000
P.A.C.A.	12 482
TOTAL FRANCE 2020 *	**93 542**

*** 3 regions**

2019 PRODUCTION	132 216
AVERAGE 2014-2018	141 233

VARIATION 2020/2019	**- 38 674**
	- 29%
VARIATION 2020 / Average 2014-2018	**- 47 691**
	- 34%

COMMENTS

The 2019 apricot campaign has been a commercially complicated one. From the beginning of the harvest in Spain at the beginning of May, the prices were at peak season levels, sometimes not even reaching one euro/kg (departure from Murcia). The weather conditions in Northern Europe were not favourable to consumption and the limited supply did not find buyers. The rest of the season remained complicated with very disappointing prices for all European producers.

However, in terms of volumes, France and Spain, the main apricot exporters, had a lower than normal production potential due to climatic problems (frost, hail, etc.). But Italy had a super harvest with more than 300 000 tonnes and Greece also had a good harvest of over 90 000 tonnes.

In 2019, these 4 countries produced 640 000 tonnes, which is close to the production of 2017, which was also a difficult year from a commercial point of view.

What we have seen over the last 3 or 4 years is a strong varietal conversion of orchards, particularly in Spain and Italy, with the disappearance of traditional varieties, often with a dual purpose (fresh and industrial) and the arrival of "modern" varieties corresponding to the "new" market standards (blush or even red colouring, good post-harvest behaviour, etc.).

Spain has always been an apricot exporting country, mainly in the early niche market, but the development of new orchards, particularly in Catalonia and Aragon, and the varietal conversion in the Murcia region have boosted Spain's export potential, cutting off French and Italian production from the northern European markets and creating an imbalance between supply and demand on national markets.

The year 2020 is shaping up with a very small apricot harvest at the European level. With 400 000 tonnes forecasted, one has to go back to 2003 and 1998 to find lower harvests with 390 000 tonnes and 365 000 tonnes respectively.

A succession of climatic hazards has affected the various European production areas and none of them can boast having escaped from them.

The southern or Mediterranean production areas have experienced an exceptionally mild winter, with few hours of cold and very high temperatures in December and February, with peaks sometimes exceeding 25 °C. This winter climate did not make it possible to satisfy the cold hours necessary for the dormancy of certain varieties, resulting in sparse, erratic, heterogeneous flowering and a production deficit.

At the end of March a cold wave hit the more northern or continental regions such as Aragon, Catalonia (Lleida), the Rhone Valley, Northern Italy and Greek Macedonia with frost that "toasted" many orchards.

Then in April it was hail in Castilla la Mancha and rain in the Mediterranean areas that drove the nail in, causing a few tons of rotten or burst fruit to be lost here and there.

At the end of April, harvesting has already started in the Murcia region with limited sugar levels for the moment due to bad weather but a fluid market. Most of the other regions will follow in mid-May with the early varieties.

GREECE

With a 78 500 onnes forecast, Greek apricot production in 2020 will be 13% lower than last year and 23% higher than the 2014/2018 average.

While southern Greece (Peloponnese) did not suffer any damage, frosts in northern Greece and mainly in Macedonia penalized the production potential despite the entry into production of new orchards.

The start of the harvest is expected to be slightly later than in 2019.

SPAIN

In 2019, the 110 233 tonnes, apricot production was 28% lower than in 2018.

The apricot season was characterized by a generalized drop in production in the main areas, linked to the low number of cold hours during the winter to cover the needs of fruit trees, which resulted in a heterogeneous and generally poor fruit set.

In addition, the drop in production in 2019 was particularly strong in the region of Murcia and Castilla la Mancha due to the frosts in March, which caused significant losses. In the late production areas (Aragon and Catalonia), although the early varieties were the most affected by the frosts, there was a slight increase compared to 2018.

The quality of the fruit was generally very good until the end of the campaign. However, due to the drop in temperatures in the northern European consumption areas until week 20, supply exceeded demand, which led to a fall in prices that was not recovered until the end of the season.

In terms of production, the trend goes for increasing yields and quality in all niche markets and stone fruit species. In recent years there has been no significant change in the number of operators or cultivated areas, although investment groups arrived in this sector.

In terms of markets, the stone fruit sector, like many others, is subject to a significant increase in constraints and regulations of all types (environmental, health, labour legislation, etc.) which automatically generates an increase in production costs that is not passed on to selling prices, leading to a deterioration in economic results.

At the market level, there has also been an increase in stone fruit production in the southern countries of the former USSR and Turkey with "European" production techniques that cover the demand lost to the EU in Russia. At the same time, we are seeing more intensive Turkish production being exported to the European Union and found in the Union's supermarkets.

The main challenges for the Spanish stone fruit sector are

- Structural problems linked to an insufficient level of concentration and organisation of supply and the need to increase the organisation of producers around well-sized PO cooperatives.
- Increasing competitiveness to maintain its position on the European market in the face of new competitors
- The development and promotion of consumption at European level to offset excess supply
- The objective of achieving strict and harmonised phytosanitary controls for all extra-European imports

- Organizing and coordinating efforts to prevent the primary sector from continuing to be used as a bargaining chip in international negotiations with countries such as Morocco and Turkey.

This year's 2020 crop is expected to decline by 15% for the second consecutive year, following an overall decline in production in all basins.

With 93 740 tonnes, this will be 25% below the average of the last 5 years.

This drop in production is due, on the one hand, to problems during flowering and a deficit in the rate of fruit set as a consequence of the lack of cold hours and, on the other hand, to damage caused by heavy frosts in March (Aragon and Catalonia) and hail at the beginning of April (Castilla La Mancha).

After declaring a state of emergency in Spain at the beginning of March due to the COVID 19 pandemic, currently the main concern that will condition the thinning, harvesting, packaging and marketing yards will be the lack of manpower and logistical difficulties (travel, accommodation, protective equipment, organization in the stations) to implement all the sanitary measures in the stations and orchards.

ITALY

Last year, apricot production in Italy was very high, but the quality was affected by hail, which particularly affected production in the first part of the calendar.

Expected apricot production for 2020 has been strongly impacted by various frost events that occurred in late March and early April. The northern regions of Italy were particularly affected, but also the south-central regions along the Adriatic coast.

Even before the frosts, less flowering than usual was reported. In many production basins it was clear that flowering was not as high as in 2019 due to physiological alternation. Moreover, in some areas, the mild winter had not covered the cold hours needed for the trees to dormant.

In March, the weather was marked by a long phase of good weather and above-normal temperatures, which led to an advance in flowering, which then lasted for several weeks.

In short, The Italian production is expected to be around 136 000 tonnes, down 56% from last year and 40% below average.

Even if all the production basins have been impacted, Emilia Romagna has seen the biggest decrease, from 107 000 tonnes in 2019 to 11 000 tonnes in 2020.

In terms of production areas, after years of increasing areas, we are returning to a situation of relative balance between grubbings and new plantings. For 2020, the areas in production in Italy are estimated at 21 000 ha, a stable potential compared to 2019. Of course the evolution of the areas varies from one region to another, but with limited deviations from last year, which leads to this overall stability.

FRANCE

The Apricot 2020 campaign in France is marked by the effects of the climate.

First of all, an exceptionally mild winter with maximum temperatures above 20° or even 25° in December and then again mild temperatures at the beginning of the year.

In many production areas, particularly in the southernmost areas such as Crau, Costière or Roussillon, the cooling requirements of many varieties were not met, the dormancy of the trees was insufficient, resulting in erratic, very long flowering, often with malformed or necrotic buds.

Then at the end of March, certain areas of the north of Gard, but especially Vaucluse, Drome, Baronnies, Isère and Ardèche suffered several episodes of frost.

The orchards that could be protected by candles or wind towers were partially saved, the same for some hillside orchards but for the rest the damage is important or even very important.

The 2020 forecast for French production is 93 500 tonnes, with a 29% drop compared to 2019, which was already a deficit year, and a 34% drop compared to the 2014/2018 average.

In terms of earliness, while the season had started ahead of the first flowering, the bad weather shifted the calendar to more traditional dates with the start of harvesting around 15th - 20th May in the earliest areas.

EUROPECH'.

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GREECE

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