# Southern Hemisphere Fresh Apple and Pear Crop Forecast

# FEBRUARY 2015

WORLD APPLE AND PEAR ASSOCIATION

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## INTRODUCTION

WAPA is pleased to provide the 2015 apple and pear crop estimate for the Southern Hemisphere. This report has been compiled with the support of ASOEX (Chile), CAFI (Argentina), ABPM ( Brazil), SAAPPA (South Africa), APAL (Australia) and Pipfruit New Zealand (New Zealand) and provides consolidated data from the 6 leading Southern Hemisphere countries. Compiling these data, has previously proved a valuable exercise for the global apple and pear industry and a reliable source of information when the season progressively shifts from the Northern to the Southern Hemisphere.

Placing first the focus on apples, 2015 crop forecast suggests on an aggregate basis a noteworthy increase compared to last year influenced by Australia (+13%), New Zealand (+13%), South Africa (+10%) and  Brazil (+6%), with no countries showing a decrease. Argentina and Chile also forecast a slight increase of +2 and +1%. This year's crop is consequently estimated at 5.542.000 T up 5% on that of last year, and up 2% on the running average of crops between 2012 and 2014. Chile remains the largest southern hemisphere apple producer in 2015 at 1.678.000 T, while Brazil keeps the second place with 1.234.000 T. Argentina remains third with 907.000 T and South Africa is not far behind at 874.000 T. Forecasted export figures decrease by 5% to 1.723.056 T.

Looking at pears, Southern Hemisphere growers predict an increase of the crop compared to 2014. Indeed, it is reported that the 2015 crop will increase by 5% on that of last year to 1.583.000 T and will also be up 4% compared to the overall average of years 2012-2014. New Zealand (+30%), Chile (+15%), Argentina (+10%) and Australia (+4%) all report an increase, whereas South Africa is the only to report a decrease of -3%. Forecasted export figures for pears are reported to be 4% up compared to 2014 at 752.638 T.

As an additional note, the figures for Argentina are expected to change still, given the impact of heavy hail at the beginning of February 2015.

This report is also providing breakdown information by varieties and is detailing the market offer between export, domestic and industry.

All data are presented in metric tonnes.

# SOUTHERN HEMISPHERE APPLES FORECAST 2015

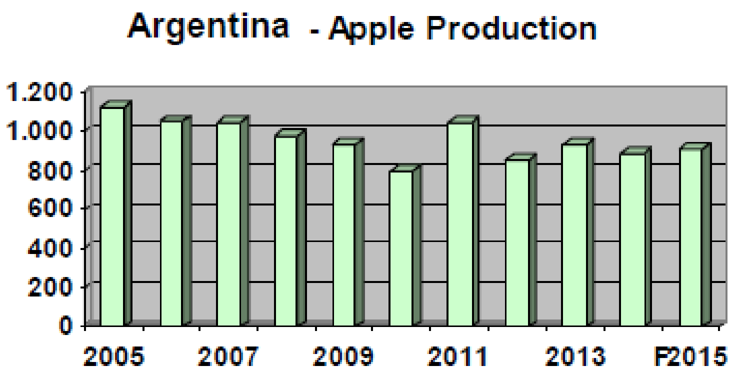
**ARGENTINA** *Figures might no longer be accurate given heavy hail at the beginning of February

## Apple production

*x 1000 tons*

| Variety | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | F2015 | (1) | (2) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Granny Smith | 203 | 196 | 165 | 148 | 225 | 198 | 165 | 189 | 180 | -5 | -2 |
| Red Delicious | 601 | 576 | 560 | 435 | 685 | 529 | 601 | 541 | 540 | 0 | -3 |
| Royal Gala | 113 | 112 | 83 | 86 | 98 | 90 | 122 | 120 | 112 | -7 | 1 |
| Other | 130 | 97 | 125 | 131 | 40 | 36 | 42 | 40 | 75 | 88 | 91 |
| **Total Argentina** | **1.047** | **980** | **933** | **800** | **1.048** | **853** | **930** | **890** | **907** | **2** | **3** |

*(1) Percentage difference between F2015 and 2014*
*(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014*




## Apple market offer

| MT | Market | 2011 | 2012 | 2013 | 2014 | F2015 |
|---|---|---|---|---|---|---|
| Production | | **1.048.071** | **853.022** | **930.269** | **890.300** | **907.000** |
| Market offer | Export | 212.903 | 133.233 | 163.500 | 160.600 | 149.900 |
| | Domestic | 332.363 | 369.179 | 360.600 | 370.500 | 310.706 |
| | Industry | 502.805 | 350.610 | 406.169 | 359.200 | 446.394 |
| | Total | 1.048.071 | 853.022 | 930.269 | 890.300 | 907.000 |

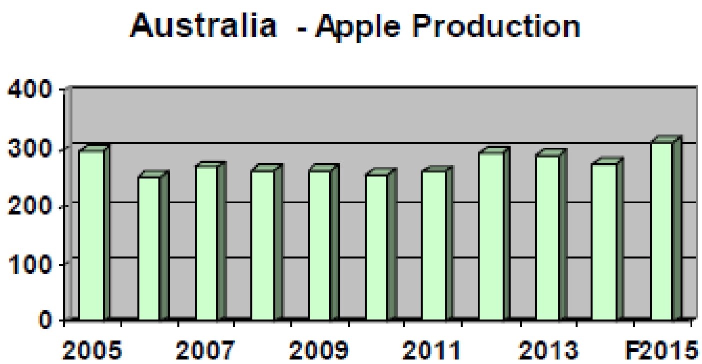
## AUSTRALIA

### Apple production

*x 1000 tons*

| *Variety* | *2007* | *2008* | *2009* | *2010* | *2011* | *2012* | *2013* | *2014* | *F2015* | *(1)* | *(2)* |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Bonza | 1 | 2 | 1 | 1 | 1 | 1 | 0 | 0 | 0 | #Num! | -100 |
| Braeburn | 3 | 3 | 3 | 3 | 3 | 3 | 1 | 0 | 0 | #Num! | -100 |
| Cripps pink | 56 | 60 | 62 | 64 | 81 | 89 | 90 | 96 | 114 | 18 | 24 |
| Cripps red | 20 | 20 | 20 | 18 | 14 | 15 | 19 | 15 | 18 | 20 | 9 |
| Red Delicious | 39 | 38 | 38 | 34 | 26 | 29 | 26 | 15 | 17 | 16 | -26 |
| Fuji | 22 | 20 | 21 | 17 | 19 | 21 | 22 | 25 | 29 | 17 | 28 |
| Golden Delicious | 16 | 12 | 10 | 8 | 6 | 7 | 5 | 9 | 9 | 6 | 34 |
| Granny Smith | 65 | 59 | 60 | 60 | 71 | 85 | 80 | 52 | 56 | 7 | -23 |
| Jonagold & Jona | 4 | 3 | 3 | 3 | 3 | 3 | 1 | 1 | 1 | 0 | -47 |
| Lady Williams | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 1 | 0 | -100 | -100 |
| Royal Gala | 37 | 39 | 40 | 41 | 29 | 32 | 36 | 55 | 64 | 17 | 57 |
| Other | 3 | 3 | 4 | 4 | 5 | 6 | 7 | 7 | 4 | -45 | -43 |
| **Total Australia** | **267** | **262** | **263** | **255** | **260** | **293** | **289** | **275** | **311** | **13** | **7** |

*(1) Percentage difference between F2015 and 2014*
*(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014*



# BRAZIL

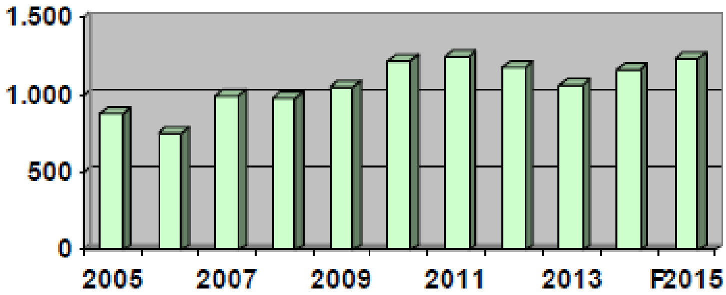
## Apple production

*x 1000 tons*

| Variety | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | F2015 | (1) | (2) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Fuji Other Clon | 357 | 353 | 354 | 430 | 374 | 416 | 358 | 451 | 465 | 3 | 14 |
| Gala Other Clo | 595 | 570 | 642 | 733 | 807 | 679 | 619 | 610 | 679 | 11 | 7 |
| Other | 42 | 61 | 57 | 64 | 69 | 89 | 86 | 104 | 90 | -14 | -3 |
| **Total Brazil** | **993** | **983** | **1.053** | **1.226** | **1.250** | **1.184** | **1.063** | **1.165** | **1.234** | **6** | **8** |

*(1) Percentage difference between F2015 and 2014*
*(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014*

**Brazil - Apple Production**




## Apple market offer

| MT | Market | 2011 | 2012 | 2013 | 2014 | F2015 |
|---|---|---|---|---|---|---|
| Production | | **1.250.000** | **1.184.243** | **1.063.000** | **1.165.394** | **1.252.227** |
| Market offer | Export | 48.665 | 72.096 | 85.467 | 44.294 | 50.000 |
| | Domestic | 826.335 | 816.147 | 743.533 | 856.100 | 952.227 |
| | Import | 96.565 | 57.920 | 95.075 | 116.697 | 70.000 |
| | **Domestic fresh offer** | **922.900** | **874.067** | **838.608** | **972.797** | **1.022.227** |
| | Industry | 375.000 | 296.000 | 234.000 | 265.000 | 250.000 |
| Brazilian population (000) | | 194.933 | 196.526 | 198.043 | 199.492 | 200.882 |
| Fresh consumption (kg/hab) | | 4,73 | 4,45 | 4,23 | 4,88 | 5,09 |

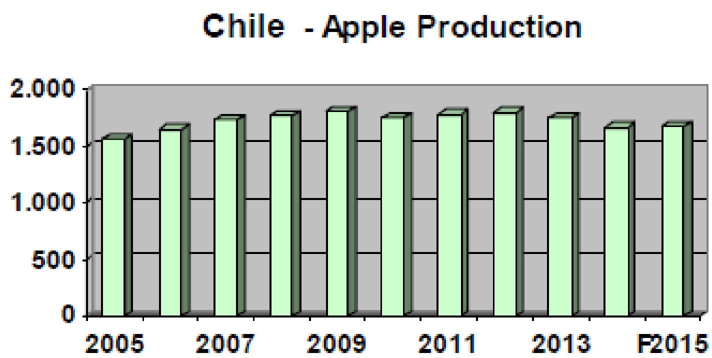
## CHILE

### Apple production

*x 1000 tons*

| *Variety* | *2007* | *2008* | *2009* | *2010* | *2011* | *2012* | *2013* | *2014* | *F2015* | *(1)* | *(2)* |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Braeburn | 79 | 67 | 67 | 64 | 54 | 53 | 61 | 58 | 56 | -3 | -2 |
| Cripps pink | 62 | 79 | 85 | 92 | 89 | 124 | 148 | 167 | 164 | -2 | 12 |
| Fuji | 200 | 179 | 191 | 197 | 196 | 252 | 183 | 199 | 177 | -11 | -16 |
| Gala | 515 | 614 | 652 | 670 | 678 | 671 | 709 | 698 | 701 | 0 | 1 |
| Granny Smith | 414 | 419 | 430 | 396 | 392 | 371 | 319 | 227 | 289 | 27 | -5 |
| Red Delicious | 418 | 371 | 334 | 284 | 339 | 300 | 257 | 244 | 223 | -9 | -16 |
| Other | 44 | 41 | 52 | 52 | 36 | 35 | 78 | 74 | 68 | -9 | 9 |
| **Total Chile** | **1.732** | **1.770** | **1.811** | **1.755** | **1.784** | **1.806** | **1.755** | **1.667** | **1.678** | **1** | **-6** |

*(1) Percentage difference between F2015 and 2014*
*(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014*




### Apple market offer

| MT | Market | 2011 | 2012 | 2013 | 2014 | F2015 |
|---|---|---|---|---|---|---|
| Production | | **1.784.000** | **1.765.000** | **1.746.000** | **1.670.190** | **1.708.000** |
| Market offer | Export | 794.000 | 758.000 | 823.000 | 798.000 | 801.000 |
| | Domestic | 357.000 | 353.000 | 314.000 | 313.000 | 306.000 |
| | Industry | 632.000 | 654.000 | 610.000 | 556.066 | 571.000 |
| | Total | 1.784.000 | 1.765.000 | 1.746.000 | 1.670.190 | 1.708.000 |

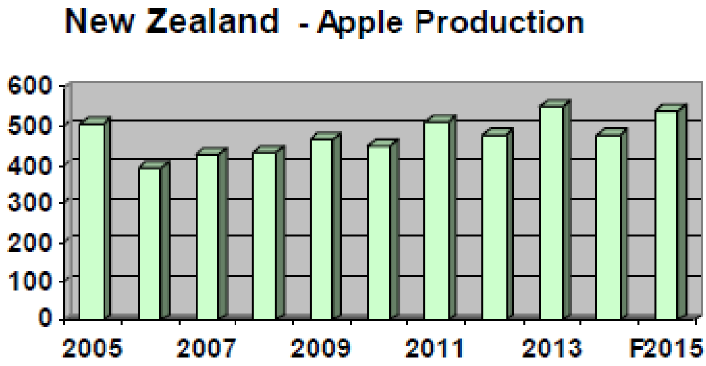
## NEW ZEALAND

### Apple production

*x 1000 tons*

| Variety | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | F2015 | (1) | (2) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Braeburn | 167 | 127 | 146 | 121 | 132 | 120 | 128 | 111 | 112 | 1 | -6 |
| Cripps Pink | | 14 | 15 | 17 | 20 | 24 | 27 | 26 | 34 | 31 | 32 |
| Fuji | 30 | 43 | 43 | 45 | 60 | 48 | 60 | 43 | 54 | 26 | 7 |
| Jazz | 12 | 19 | 28 | 45 | 55 | 52 | 52 | 52 | 52 | 0 | 0 |
| Royal Gala | 156 | 154 | 152 | 151 | 163 | 144 | 161 | 141 | 156 | 11 | 5 |
| Other | 61 | 45 | 44 | 44 | 47 | 49 | 78 | 60 | 76 | 27 | 22 |
| Pacific series | | 32 | 38 | 25 | 36 | 39 | 44 | 45 | 54 | 20 | 27 |
| **Total New Zealand** | **427** | **434** | **466** | **448** | **513** | **476** | **550** | **478** | **538** | **13** | **7** |

*(1) Percentage difference between F2015 and 2014*
*(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014*




### Apple market offer

| MT | Market | 2011 | 2012 | 2013 | 2014 | F2015 |
|---|---|---|---|---|---|---|
| Production | | **513.149** | **475.122** | **550.860** | **478.350** | **538.347** |
| Market offer | Export | 299.643 | 285.049 | 324.685 | 310.669 | 298.443 |
| | Domestic | 66.600 | 59.850 | 69.902 | 63.549 | 69.120 |
| | Industry | 146.906 | 130.824 | 156.272 | 104.132 | 170.784 |
| | Total | 513.149 | 475.723 | 550.860 | 478.350 | 538.347 |

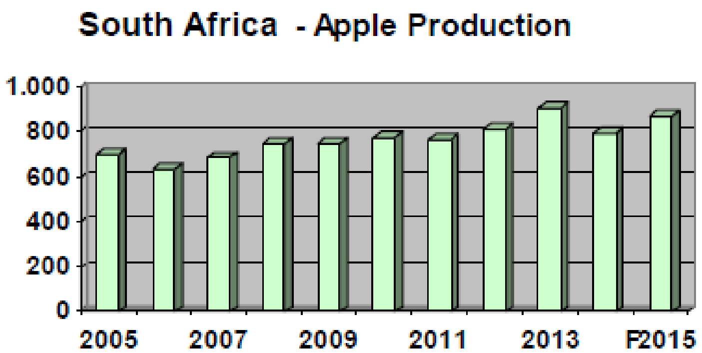
## SOUTH AFRICA

### Apple production

*x 1000 tons*

| Variety | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | F2015 | (1) | (2) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Braeburn | 23 | 24 | 24 | 24 | 23 | 33 | 36 | 24 | 26 | 10 | -15 |
| Cripps pink | 46 | 53 | 53 | 56 | 55 | 73 | 82 | 79 | 87 | 10 | 12 |
| Fuji | 28 | 34 | 34 | 41 | 40 | 57 | 63 | 64 | 70 | 10 | 14 |
| Golden Delicio | 165 | 159 | 159 | 161 | 160 | 203 | 227 | 151 | 166 | 10 | -14 |
| Granny Smith | 161 | 182 | 182 | 182 | 180 | 171 | 190 | 199 | 218 | 10 | 17 |
| Oregon Spur | 9 | 9 | 9 | 8 | 8 | 8 | 9 | 8 | 9 | 10 | 4 |
| Royal Gala | 80 | 86 | 85 | 87 | 86 | 122 | 136 | 127 | 140 | 10 | 9 |
| Starking | 41 | 41 | 40 | 39 | 39 | 34 | 38 | 24 | 26 | 10 | -18 |
| Topred | 43 | 43 | 43 | 43 | 42 | 41 | 45 | 32 | 35 | 10 | -11 |
| Other | 93 | 118 | 117 | 135 | 133 | 71 | 80 | 87 | 96 | 10 | 21 |
| **Total South Africa** | **689** | **749** | **747** | **775** | **768** | **813** | **907** | **794** | **874** | **10** | **3** |

*(1) Percentage difference between F2015 and 2014*
*(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014*




### Apple market offer

| MT | Market | 2011 | 2012 | 2013 | 2014 | F2015 |
|---|---|---|---|---|---|---|
| Production | | 768.125 | 813.192 | 906.827 | 794.177 | 873.595 |
| Market offer | Export | 318.993 | 358.456 | 434.663 | 339.321 | 423.713 |
| | Domestic | 231.285 | 209.198 | 203.173 | 207.236 | 221.468 |
| | Industry | 217.847 | 245.538 | 268.991 | 247.620 | 228.414 |
| | Total | 768.125 | 813.192 | 906.827 | 794.177 | 873.595 |

## SOUTHERN HEMISPHERE
## APPLE PRODUCTION BY COUNTRY

Apples

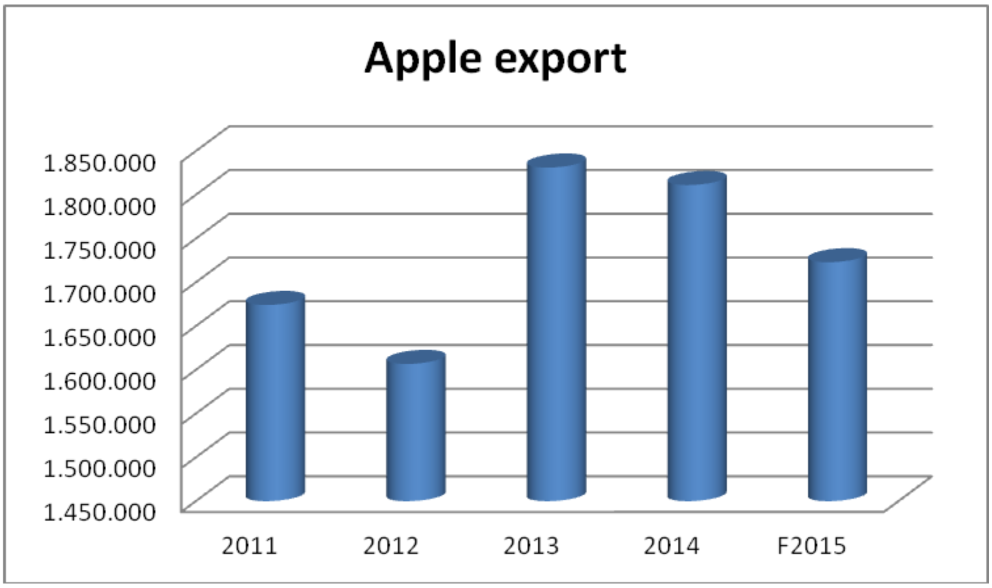
*x 1000 tons*

| Country | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | F2015 | (1) | (2) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Argentina | 1.047 | 980 | 933 | 800 | 1.048 | 853 | 930 | 890 | 907 | 2 | 2 |
| Australia | 267 | 262 | 263 | 255 | 260 | 293 | 289 | 275 | 311 | 13 | 9 |
| Brazil | 993 | 983 | 1.053 | 1.226 | 1.250 | 1.184 | 1.063 | 1.165 | 1.234 | 6 | 8 |
| Chile | 1.732 | 1.770 | 1.811 | 1.755 | 1.784 | 1.806 | 1.755 | 1.667 | 1.678 | 1 | -4 |
| New Zealand | 427 | 434 | 466 | 448 | 513 | 476 | 550 | 478 | 538 | 13 | 7 |
| South Africa | 689 | 749 | 747 | 775 | 768 | 813 | 907 | 794 | 874 | 10 | 4 |
| **Total** | **5.156** | **5.178** | **5.272** | **5.260** | **5.623** | **5.426** | **5.494** | **5.269** | **5.542** | **5** | **2** |

*(1) Percentage difference between F2015 and 2014*
*(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014*

## SOUTHERN HEMISPHERE
## APPLE EXPORTS BY COUNTRY

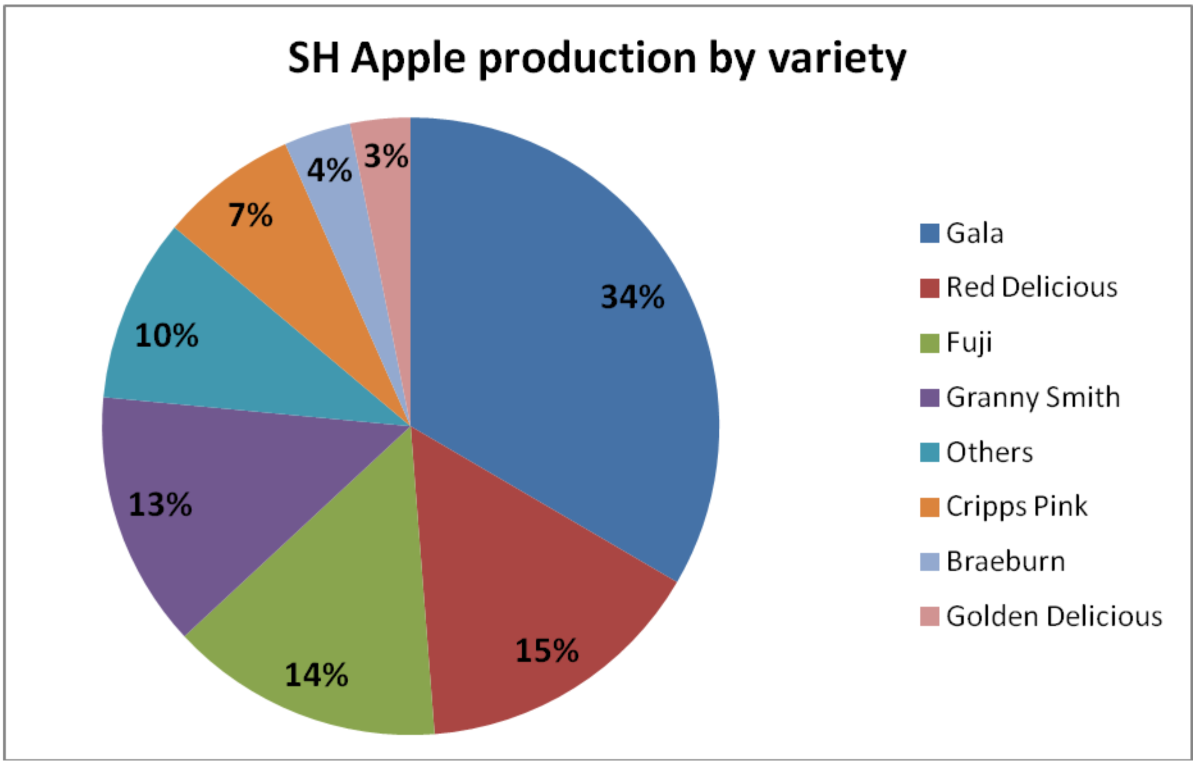
| Country (MT) | 2011 | 2012 | 2013 | 2014 | F2015 | -1 | -2 |
|---|---|---|---|---|---|---|---|
| Argentina | 212.903 | 133.233 | 163.500 | 160.600 | 149.900 | -7% | -2% |
| Brazil | 48.665 | 72.096 | 85.467 | 44.294 | 50.000 | 13% | -26% |
| Chile | 794.000 | 758.000 | 823.000 | 798.000 | 801.000 | 0% | 1% |
| New Zealand | 299.643 | 285.049 | 324.685 | 303.251 | 298.443 | -2% | -2% |
| South Africa | 318.966 | 358.456 | 434.663 | 397.452 | 423.713 | 7% | 7% |
| **TOTAL** | **1.674.177** | **1.606.834** | **1.831.217** | **1.811.303** | **1.723.056** | **-5%** | **-2%** |



## SOUTHERN HEMISPHERE
## APPLE PRODUCTION BY VARIETY

*x 1000 tons*

| *Variety* | *2007* | *2008* | *2009* | *2010* | *2011* | *2012* | *2013* | *2014* | *F2015* | *(1)* | *(2)* |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Braeburn** | 272 | 220 | 239 | 212 | 212 | 209 | 226 | 193 | 194 | 1 | -7 |
| **Cripps pink** | 164 | 206 | 215 | 229 | 245 | 310 | 347 | 369 | 399 | 8 | 17 |
| **Fuji** | 636 | 629 | 643 | 729 | 689 | 794 | 686 | 781 | 794 | 2 | 5 |
| **Gala** | 1.496 | 1.574 | 1.654 | 1.768 | 1.862 | 1.738 | 1.784 | 1.751 | 1.852 | 6 | 5 |
| **Golden Delicious** | 181 | 172 | 169 | 169 | 166 | 210 | 232 | 159 | 175 | 10 | -13 |
| **Granny Smith** | 843 | 856 | 837 | 786 | 868 | 825 | 754 | 667 | 743 | 11 | -1 |
| **Red Delicious** | 1.152 | 1.078 | 1.025 | 843 | 1.140 | 941 | 976 | 863 | 850 | -2 | -8 |
| **Others** | 412 | 443 | 491 | 524 | 441 | 399 | 489 | 487 | 534 | 10 | 17 |
| **Total:** | **5.156** | **5.178** | **5.272** | **5.260** | **5.623** | **5.426** | **5.494** | **5.269** | **5.542** | **5** | **2** |



# SOUTHERN HEMISPHERE PEARS FORECAST 2015

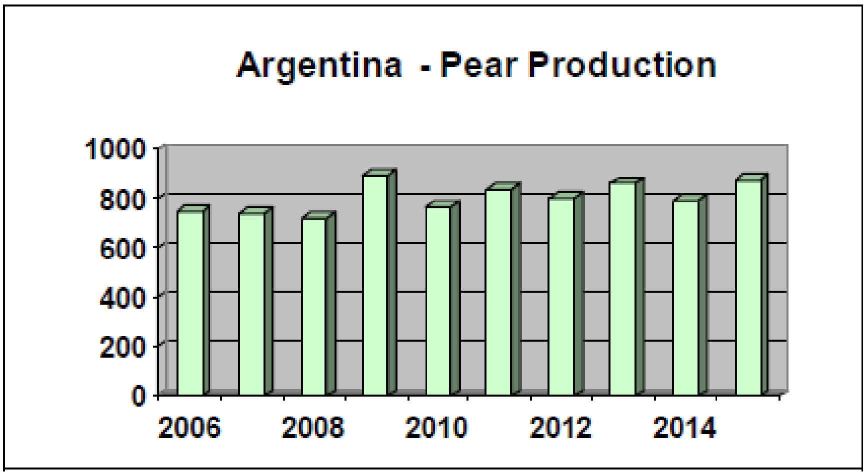
**ARGENTINA** *Figures might no longer be accurate given heavy hail at the beginning of February

## Pear production

*x 1000 tons*

| Variety | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | F2015 | (1) | (2) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Anjou | 78 | 80 | 92 | 90 | 92 | 92 | 86 | 95 | 90 | 5 | -1 |
| Packham's | 257 | 250 | 290 | 250 | 261 | 247 | 246 | 266 | 270 | 10 | 7 |
| Williams BC | 287 | 273 | 345 | 280 | 390 | 361 | 413 | 338 | 416 | 1 | 12 |
| Other | 117 | 120 | 168 | 150 | 100 | 101 | 118 | 95 | 100 | -15 | -4 |
| **Total Argentina** | **739** | **723** | **895** | **770** | **843** | **801** | **863** | **794** | **876** | **10** | **7** |

*(1) Percentage difference between F2015 and 2014*
*(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014*




### Pear market offer

| MT | Market | 2011 | 2012 | 2013 | 2014 | F2015 |
|---|---|---|---|---|---|---|
| Production | | **843.037** | **801.488** | **829.558** | **794.350** | **876.000** |
| Market offer | Export | 454.271 | 396.058 | 434.996 | 438.500 | 412.128 |
| | Domestic | 141.517 | 142.212 | 134.400 | 130.550 | 143.851 |
| | Industry | 247.249 | 263.218 | 260.162 | 225.300 | 320.121 |
| | Total | 843.037 | 801.488 | 829.558 | 794.350 | 876.100 |

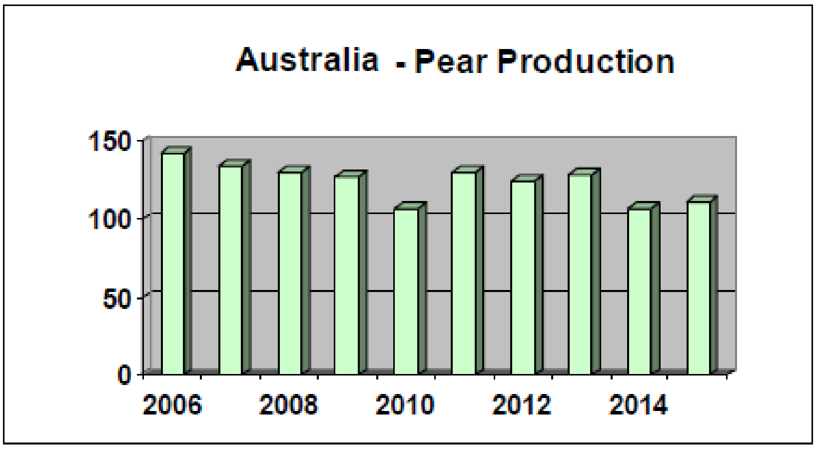
## AUSTRALIA

### Pear production

*x 1000 tons*

| Variety | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | F2015 | (1) | (2) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Beurre Bosc | 10 | 9 | 9 | 9 | 9 | 8 | 9 | 9 | 10 | 6 | 9 |
| Corella | 1 | 2 | 2 | 2 | 3 | 3 | 3 | 3 | 5 | 48 | 57 |
| Josephine | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 4 | 17 | 21 |
| Nashi | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 0 | 3 |
| Packham's | 52 | 52 | 52 | 52 | 54 | 53 | 53 | 46 | 47 | -12 | -8 |
| Red Anjou | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | -100 | -100 |
| Sensation | 0 | 1 | 1 | 1 | 1 | 1 | 1 | 0 | 0 | -100 | -100 |
| Williams BC | 63 | 59 | 55 | 35 | 55 | 52 | 54 | 41 | 43 | -20 | -12 |
| Other | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 1 | -65 | -63 |
| **Total Australia** | **135** | **130** | **127** | **107** | **130** | **124** | **129** | **107** | **111** | **4** | **-12** |

*(1) Percentage difference between F2015 and 2014*
*(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014*



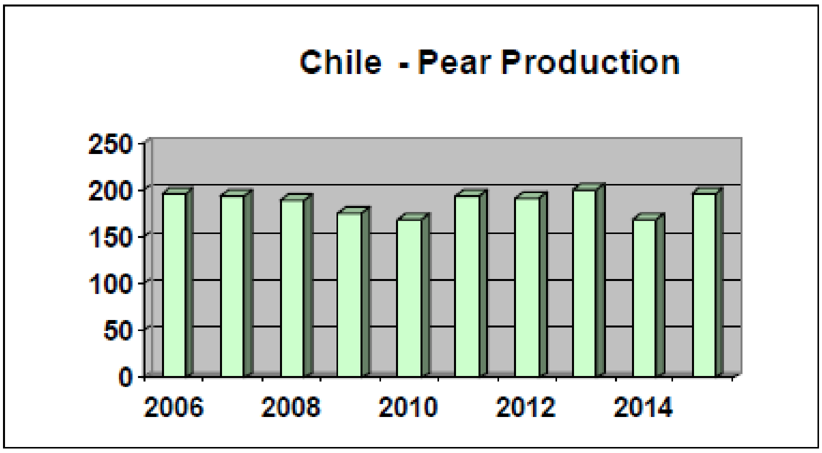
# CHILE

## Pear production

*x 1000 tons*

| Variety | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | F2015 | (1) | (2) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Abate Fetel | 9 | 9 | 9 | 9 | 12 | 13 | 18 | 15 | 21 | 14 | 33 |
| Beurre Bosc | 17 | 16 | 15 | 15 | 17 | 13 | 10 | 8 | 7 | -33 | -36 |
| Packham's | 80 | 80 | 81 | 83 | 99 | 94 | 98 | 83 | 96 | -2 | 4 |
| Williams BC | 30 | 30 | 27 | 19 | 19 | 21 | 20 | 17 | 20 | -2 | 1 |
| Winter Nelis | 13 | 13 | 11 | 11 | 10 | 8 | 6 | 5 | 5 | -19 | -24 |
| Other | 45 | 42 | 33 | 33 | 38 | 42 | 49 | 41 | 48 | 0 | 10 |
| **Total Chile** | **194** | **189** | **176** | **170** | **195** | **191** | **201** | **170** | **196** | **15** | **1** |

*(1) Percentage difference between F2015 and 2014*
*(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014*




## Pear market offer

| MT | Market | 2011 | 2012 | 2013 | 2014 | F2015 |
|---|---|---|---|---|---|---|
| Production | | **194.478** | **189.373** | **199.937** | **170.000** | **196.000** |
| Market offer | Export | 132.041 | 131.931 | 141.010 | 116.000 | 138.000 |
| | Domestic | 19.512 | 19.147 | 19.009 | 18.000 | 19.000 |
| | Industry | 42.926 | 38.295 | 39.918 | 36.000 | 39.000 |
| | Total | 194.478 | 189.373 | 199.937 | 170.000 | 196.000 |

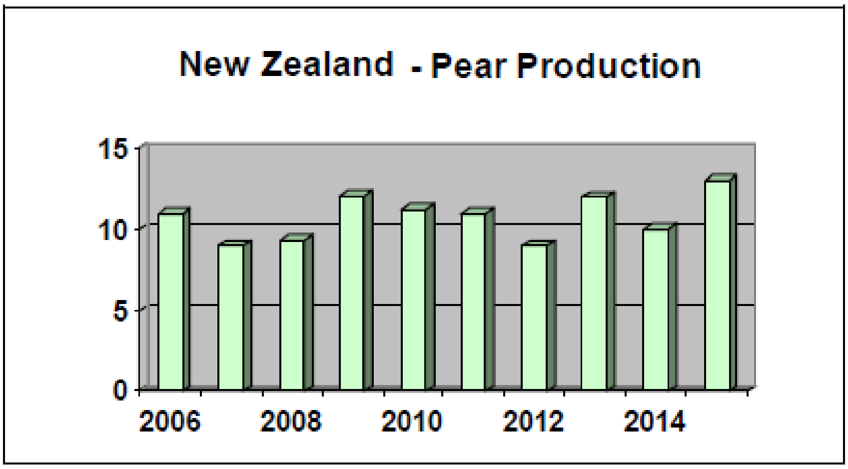
# NEW ZEALAND

## Pear production

*x 1000 tons*

| Variety | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | F2015 | (1) | (2) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Other | 9 | 9 | 12 | 11 | 11 | 9 | 12 | 10 | 13 | 8 | 26 |
| **Total New Zeala** | **9** | **9** | **12** | **11** | **11** | **9** | **12** | **10** | **13** | **30** | **30** |

*(1) Percentage difference between F2015 and 2014*
*(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014*




## Pear market offer

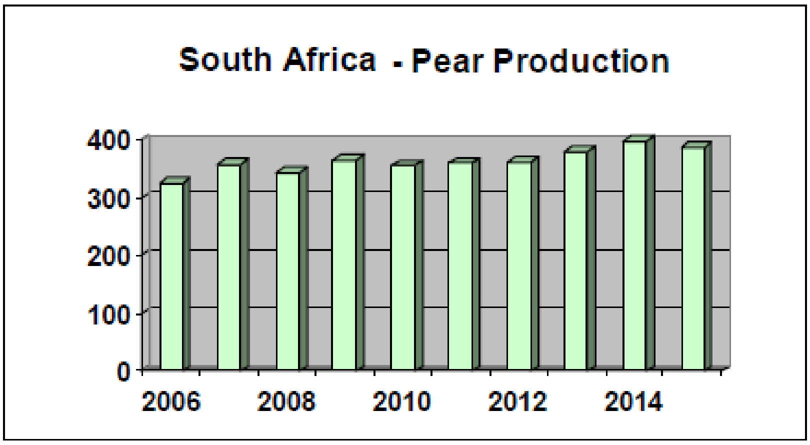
| MT | Market | 2011 | 2012 | 2013 | 2014 | F2015 |
|---|---|---|---|---|---|---|
| Production | | **11.178** | **9.568** | **12.433** | **9.776** | **12.920** |
| Market offer | Export | 4.297 | 3.868 | 4.719 | 4.972 | 5.015 |
| | Domestic | 2.000 | 2.000 | 3.495 | 2.648 | 2.880 |
| | Industry | 4.881 | 3.700 | 4.219 | 2.156 | 5.025 |
| | Total | 11.178 | 9.568 | 12.433 | 9.776 | 12.920 |

## SOUTH AFRICA
### Pear production

*x 1000 tons*

| Variety | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | F2015 | (1) | (2) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Beurre Bosc | 13 | 11 | 12 | 10 | 10 | 11 | 11 | 12 | 8 | -32 | -32 |
| Doyenne Du | 8 | 8 | 9 | 8 | 8 | 7 | 8 | 8 | 8 | 2 | 2 |
| Early Bon C | 31 | 31 | 33 | 34 | 34 | 32 | 34 | 36 | 35 | 2 | 2 |
| Forelle | 78 | 84 | 90 | 90 | 91 | 94 | 99 | 104 | 101 | 2 | 2 |
| Packham's | 98 | 98 | 105 | 103 | 104 | 105 | 110 | 116 | 124 | 13 | 12 |
| Rosemarie | 12 | 11 | 12 | 12 | 12 | 11 | 11 | 12 | 15 | 36 | 36 |
| Williams BC | 83 | 62 | 66 | 61 | 61 | 56 | 59 | 62 | 50 | -14 | -14 |
| Other | 35 | 37 | 40 | 39 | 39 | 45 | 48 | 50 | 46 | -2 | -2 |
| **Total South Afric** | **359** | **342** | **366** | **356** | **360** | **361** | **379** | **399** | **387** | **-3** | **5** |

*(1) Percentage difference between F2015 and 2014*
*(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014*




### Pear market offer

| MT | Market | 2011 | 2012 | 2013 | 2014 | F2015 |
|---|---|---|---|---|---|---|
| Production | | **359.851** | **360.854** | **379.242** | **398.744** | **386.782** |
| Market offer | Export | 176.646 | 177.848 | 197.912 | 203.660 | 197.495 |
| | Domestic | 67.379 | 52.322 | 49.324 | 49.817 | 50.315 |
| | Industry | 115.826 | 130.684 | 132.006 | 145.266 | 138.972 |
| | Total | 359.851 | 360.854 | 379.242 | 398.744 | 386.782 |

## SOUTHERN HEMISPHERE
## PEAR PRODUCTION BY COUNTRY

Pears

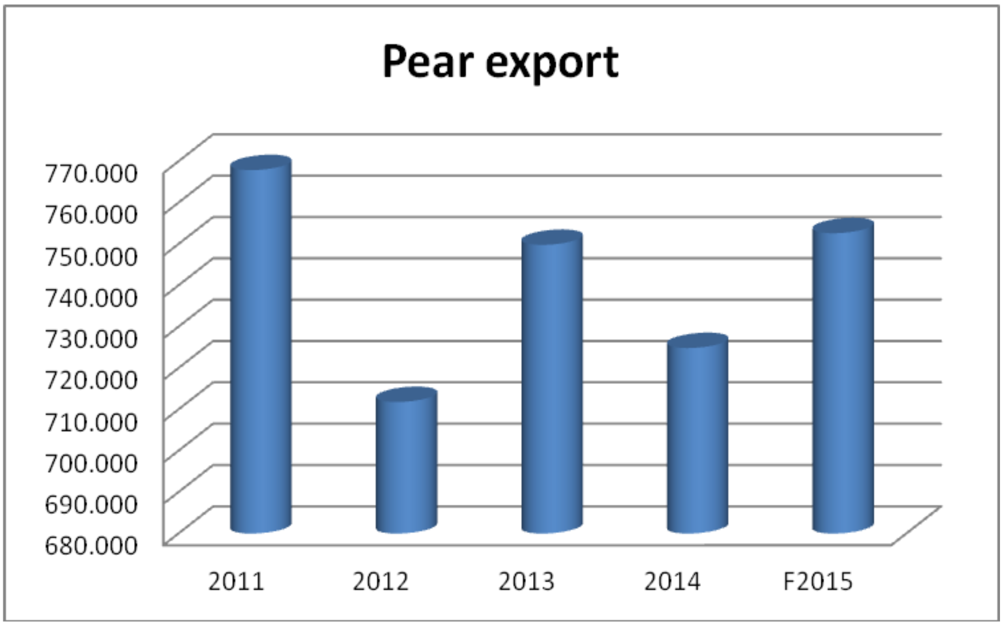
*x 1000 tons*

| Country | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | F2015 | (1) | (2) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Argentina | 739 | 723 | 895 | 770 | 843 | 801 | 863 | 794 | 876 | 10 | 7 |
| Australia | 135 | 130 | 127 | 107 | 130 | 124 | 129 | 107 | 111 | 4 | -7 |
| Chile | 194 | 189 | 176 | 170 | 195 | 191 | 201 | 170 | 196 | 15 | 5 |
| New Zealand | 9 | 9 | 12 | 11 | 11 | 9 | 12 | 10 | 13 | 30 | 26 |
| South Africa | 359 | 342 | 366 | 356 | 360 | 361 | 379 | 399 | 387 | -3 | 2 |
| **Total** | **1.436** | **1.393** | **1.577** | **1.414** | **1.539** | **1.486** | **1.583** | **1.479** | **1.583** | **7** | **4** |

*(1) Percentage difference between F2015 and 2014*
*(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014*

## SOUTHERN HEMISPHERE
## PEAR EXPORTS BY COUNTRY

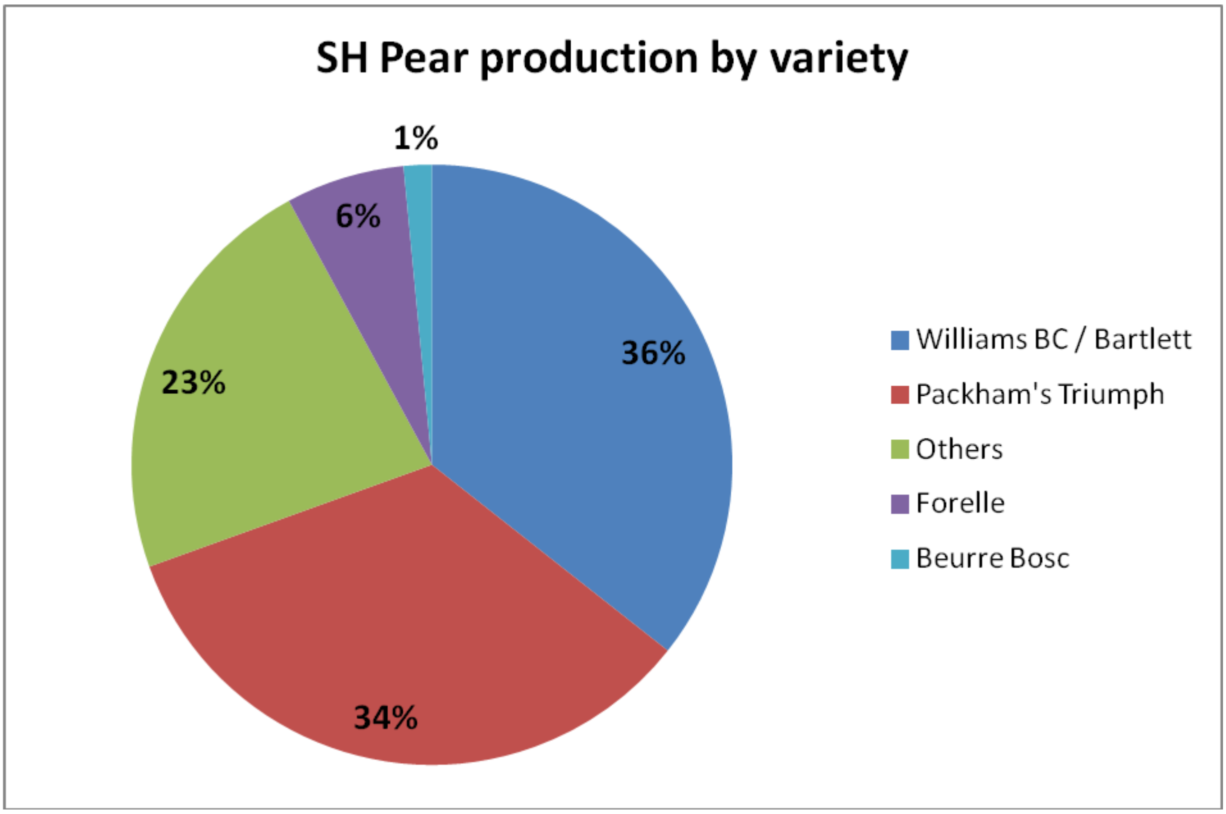
| Country (MT) | 2011 | 2012 | 2013 | 2014 | F2015 | -1 | -2 |
|---|---|---|---|---|---|---|---|
| Argentina | 454.271 | 396.058 | 434.996 | 438.500 | 412.128 | -6% | -3% |
| Chile | 132.041 | 131.931 | 141.010 | 116.000 | 138.000 | 19% | 6% |
| New Zealand | 4.297 | 3.868 | 4.719 | 4.972 | 5.015 | 1% | 11% |
| South Africa | 176.673 | 177.848 | 197.912 | 197.495 | 197.495 | 0% | 3% |
| **TOTAL** | **767.893** | **711.805** | **749.821** | **724.864** | **752.638** | **4%** | **3%** |



## SOUTHERN HEMISPHERE
## PEAR PRODUCTION BY VARIETY

*x 1000 tons*

| Variety | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | F2015 | (1) | (2) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Beurre Bosc | 40 | 35 | 36 | 34 | 36 | 32 | 30 | 29 | 24 | -18 | -22 |
| Forelle | 78 | 84 | 90 | 90 | 91 | 94 | 99 | 104 | 101 | -3 | 2 |
| Packham's T | 487 | 480 | 528 | 488 | 518 | 499 | 507 | 510 | 536 | 5 | 6 |
| Williams BC | 494 | 454 | 526 | 429 | 560 | 523 | 580 | 494 | 564 | 14 | 6 |
| Others | 337 | 341 | 397 | 374 | 334 | 339 | 368 | 342 | 358 | 5 | 2 |
| **Total:** | **1.436** | **1.393** | **1.577** | **1.414** | **1.539** | **1.486** | **1.583** | **1.479** | **1.583** | **7** | **4** |



# GENERAL COMMENTS

## ARGENTINA

### Notes on 2014 season

- The production will be slightly lower, however fruit packed will maintain in similar level than 2013, due to quality improvements
- The salaries agreements were closed in November
- Delay in national tax refunds, continues affecting the sector
- Initial change rate creates uncertainty

### Notes on 2015 season

- Pending further news on the impact of heavy hail/ storm at the beginning of February.

## AUSTRALIA

### Notes on 2014 season

- Apples: The 2014 apple season saw a 6% decrease in total volume from 2013 season with some of the early varieties been impacted significantly by adverse events such as hail, frost, heat waves, bird and bat infestations in major growing regions. The result has been a below trend volume in 2013 at 274.7 thousand tonnes which saw growers enjoy good market returns.
- Pears: The 2014 pear season saw a drop in volume from previous year as Williams trees are replaced in favour of newer pear varieties.

### Notes on 2015 season

- Apples: In contrast apple volumes for the 2015 season is predicted to be above average based on early estimates as calm weather and young trees come into fruition, fruit size is also expected to be above average from early estimates . The apple volume for 2015 is estimated to be at 311.2 thousand tonnes, with significant increases in Pink Lady and Royal Gala volumes been reported nationally in early seasons.
- Pears: In 2015 Packham pear trees are expected to carry full crop and Williams are expected to be carrying lighter crop than previous year. This will culminate in a larger crop in 2015 than 2014.

## BRAZIL

### Notes on 2014 season

- Very good winter, but blooming period with temperature under average, + rain during blooming and consequently lack of sun => distribution of the fruits is not even in the orchard, consequence pollination wasn't as good as it should be, orchards will produce under capacity. Apples are very clean, colour is appearing, some scab problem in some areas.

- Nearly no hail so far at this date 07/01/2014.
- Size of the fruits will be average in the 135. Next days will be very important for the final growth.
- Picking will be first week of February, a bit latter than last year.
    - Prospects for export: Exchange rate is far better than last year; as volume picked will be higher, interest is very strong. Sea freight will be very important for commercial decision.
- Costs continue to raise mainly labour force, far above inflation due to political will and shortage.
    - Costs are higher, labour force, energy and exchange rate has pushed inputs' prices.
- Internal market continue to be very strong, last season Gala and Fuji sold very well as quality was good.

### Notes on 2015 season

- Average winter, irregular, climate during blooming was good to very good, good fruit set in Gala, in Fuji
- Under potential, good crop forecasted, apples are very clean, few russet, no scab, up to 16/01/2015
- Nearly no hail, some glomerela in warmer region. Color is very good
- Sizing will average 120
- Export don't look like a good exit this year, exchange rate is better than last year, but market in
- Europe is under stress
    - Asia and Middle East should increase volume
    - Russia is a question mark
- Costs continue to raise above inflation, labor force mainly as electricity and orchard inputs
    - Shortage of labor force is a challenge
- Internal market is good and should remain

## CHILE

### Notes on 2014 season

- Initial forecast does not foresee a significant impact of frosts in production or export volumes.
- Apples: sizes smaller than last year, picking time similar. Pears: sizes and picking time similar to last year.
- Labour issues that have affected the sector but are foreseen to be over.
- Evolution of the variety basket of Chilean fruit is not influencing the destination market.

## Notes on 2015 season

- This season will be a challenging and competitive season for apples and pears from Chile.
- Estimated export volume of 800 thousand tons of apples and 138,000 tons of pears for this season 2015-2016
- Which in the case of apples is similar to the volumes exported last season, whilst for pears there is an expected 19% increase in volume.
- The season looks challenging and very competitive, especially for apples in the early part of the season, given various factors:
- There is an abundant local supply both in Europe and in USA of apples and pears, which is higher than in 2013 – 2014 season.
- The local supply of European apples and pears will be an important competition for apples and pears from Chile, since it is a cheaper than the imported alternative.
- The impact of the Russian Ban has meant that countries such as Poland, one of the largest suppliers of apples to Russia, has had to "relocate" their production in other markets, mostly within the EU which will stimulate a situation of oversupply.
- The positive aspect of this scenario is the positive exchange rate for Chile, which is fluctuating at approximately $ 600.
- As for the start of the harvest, the beginning of the harvest has been quite normal, slightly early in some locations.

# NEW ZEALAND

## Notes on 2014 season

- Off year on the biennial calendar
- Volume down on 2013, but improved export pack out
- Continuing growth in Asia

## Notes on 2014/15 season

- Total production well up on 2014
- Season 7 to 10 days later than last year (last year was 10 days early)
- Relatively dry season
- Some hail pre-Christmas and in January. This will affect the export pack out.
- Similar to slightly smaller fruit size
- Exceptional eating quality

## General

- As always, market access issues to deal with
- Impact of Russian embargo being monitored

## SOUTH AFRICA

### Notes on 2014 season

- Total productions increased with 6% compared to 2013 volumes.
  - (1.61 mill tons vs 1.53 mill tons)
  - Pome fruit: Apples (+12%); Pears (+5%)
  - Stone fruit: Apricots (-9%); Peaches & Nect (-4%); Plums (+22%).
- Record export crop on pears and peaches. Decline in apple, apricot and exports.
- Total export volume decreased with 13% compared to 2013:
  - Apples (-22%); Pears (+3%); Apricots (-13%); Peaches (+14%); Nectarines (-6%); Plums (-7%)
  - Domestic volumes decreased by 3.5% Y-O-Y
  - In general season was late, good quality crop, stong local market for nectarines in particular. Hail in two major production regions affecting mostly apples and plums.
  - Rate of stone fruit plantings (except plums) slowed down, pome fruit plantings increased.
  - Total pome & stone area 52 508 (+0.01% Y-O-Y):
- Apples (+2%); Pears (+2.9%); Apricots (-6%); Peaches (-1%); Nectarines (+5%); Plums (+2%)

### Notes on 2015 season

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