



Apples – Forecast quality, marketing issues and planting trends

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Italy:

1.992.000 t (-7%)

- South Tyrol 910.000 t (-7%), Trentino 428.800 t (-7%), Veneto 201.700 t (-17%), Piemont 206.500 t (+5%), Emilia R. 169.300 t (-11%)
- Cool weather during last months, size a little bit smaller than 2007, but normally
- In some areas big hail damages, national 4.000 ha affected, probably account 4-5% of the entire production
- No particular phytosanitary diseases
- Season starts 7-10 days later than 2007



South Tyrol

910.000 t (-7%)

One frost night, damages early areas/ blossoming varieties, mainly affected Braeburn (-19% vs. 2007) Cripps (-8%), Golden (-14%), Gala normally crop (-5%)

Size 1 mm less 2007, Hail - affected 1.500 -1.800 ha, (Terlan 50% damages)

Gala crop starts 11.08. main crop 18.08.08, 7 days later than 2007

varieties (2007)	plant. 2007 (in %)	acreage (in %)
Golden	37,8	36,7
Gala	15,7	16,8
Red Del.	11,7	14,0
Braeburn	7,7	8,2
Granny	11,0	5,6
Cripps P.	4,5	3,3
Kanzi	4,5	0,3

Source: Dr. Kraus, Amt für Obst-/Weinbau, Bozen



France:

1.522.000 t (-9%)

- Small Crop
 - Night frost in spring, cool weather during blossoming
 - Decrease crop Braeburn (-22%), Gala (-9%), Golden (-12%), Red Del. (-23%)
 - Acreage decrease:
2007 = 43.683 ha, (-2 % geg. '06), Golden 14.770 t (-2,7%), Granny 3.453 t (-3,2 %), Reds- 2.765 t (-3,9%)
- Quality
 - Less hail, but all areas affected
 - Good size, at the moment opt. growing condition
- Areas
 - South-East: less decrease harvest
 - South-West/ Val de Loire: Crop -10% vs. 2007



Germany:

945.000 t (-12%)

- Again average apple crop
 - Niederelbe 305.000 t (2007 = 338.000 t)
 - Bodensee 251.000 t (300.000 t)
 - Former East Germany 215.000 t (214.000 t)
 - Elstar (-24%, Jonagold (-16%), Jonagored (-14%))
- Changeable weather
 - Frost around Easter, Jonagold „frost tongues“
 - Strong blossom (exception Elstar)
 - afterwards weak fruitsetting, strong fruit drop
- Quality/fruit development
 - Hail in West-/South Germany (Bodensee 500 ha)
 - Fruit size good to above average
 - Crop 5-7 days later than 2007, but earlier than usually



Germany: Development of acreage

In ha	acreage		Share of young trees '07	
	2007	2002	1-4 years	5-9 years
Total	31.762	32.405	4.963	6.536
Elstar	5.770	5.195	992	1657
Jonagored	2.366	1.810	362	747
R. Jonaprince	514	0	401	42
Gala	1.770	1.347	411	633
Braeburn	1.699	952	592	530
Jonagold	3.807	4.462	453	724
Idared/Gloster	1.207	2.678	65	56
Golden Del.	1.416	1.842	121	181
Boskoop	1.060	1.257	325	567

Source: Stat. Bundesamt



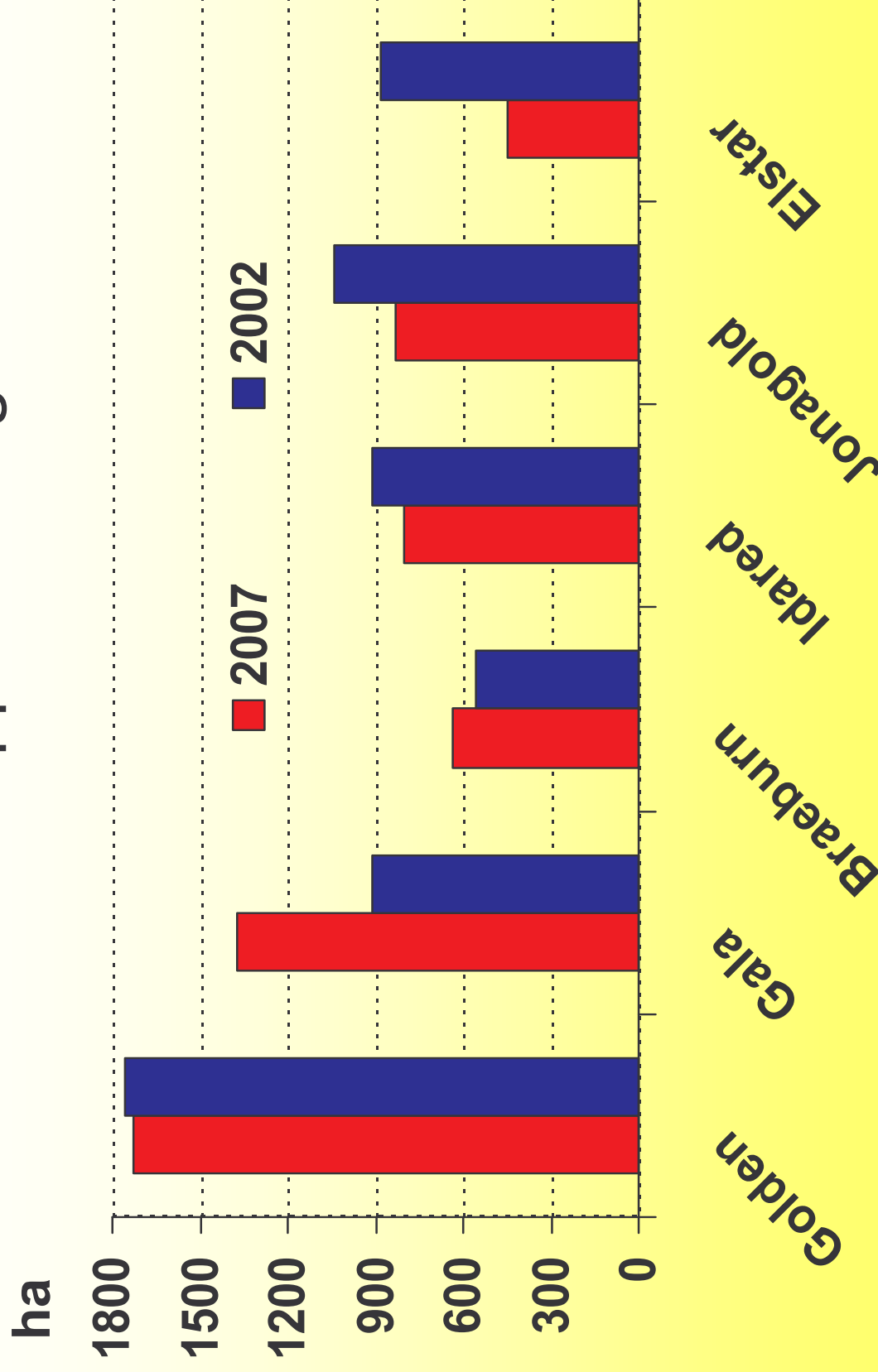
Austria:

154.000 t (-18%)

- Because of frost more marks on the skin, mainly Jonagold „frost tongues“ (crop -45%)
- Elstar low russetting
- At the moment small fruit size, because of delay crop (1 week vs. 2007) normal size expected
- Strong hail, but 70-75% of the acreage under hail net
- No problem with „Feuerbrand“



Austria: apple acreages



Source: Landeskammer für Land- und Forstwirtschaft Steiermark



Belgium:

311.000 t (-13%)

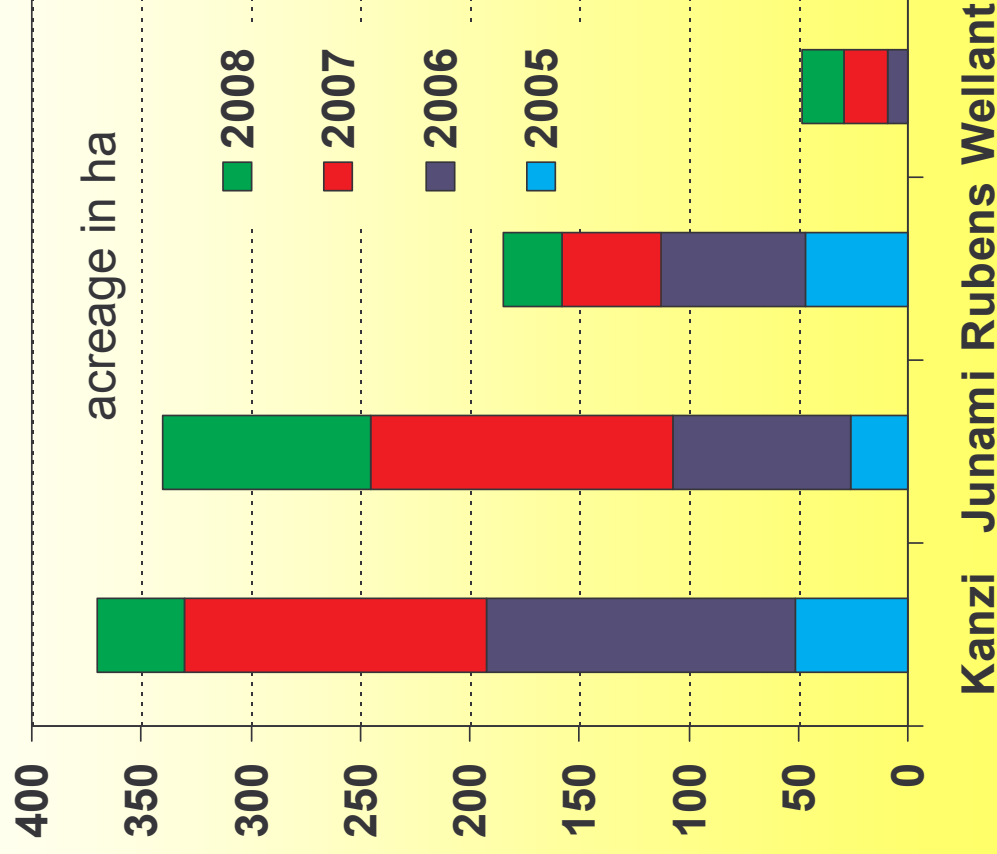
- Clearly smaller apple crop
 - After big crop in 2007 bad flower buds in 2008
 - Frost around Easter
 - Strong rain in spring, bad weather at blossoming
 - Strong fruit drop, mainly Jonagold
- Quality/crop
 - Crop 7-10 days later 2007
 - Strong hail damage, less russetting, some scab
 - Size Kaliber a little bit smaller than 2007
- Varieties development
 - Acreage Jonagold decrease', more/unchange interest Jonagored
 - More interest in Belgica, (2008 = 2.000 t ('07 =1.000 t)
 - More Kanzi planting, but not as much as in NL/GER



Netherlands:

- Frost – apples less affected than pears and stone fruit
- Dry/warm weather in May improved the development
- Elstar – good fruitsetting
Jonagold/Jonagored – less harvest, big size
- Normal crop start,
7 days later than 2007
- Strong hail
- Club varieties (Kanzi, Junami, Rubens) 17.000 t expected

385.000 t (-3%)





United Kingdom:

193.000 t (-2%)

- Night frost in early April
 - Bramley flower damages, crop (-15%)
 - Other varieties unaffected, Braeburn (+11%), Gala (+16%)
- Cool temperatures and lack of sunshine
- Wind in April, May, June and first half of July greater than normal
- Some light hail, but little damage
- More scab than 2007
- Average fruit size



Spain: 643.000 t (+7%)

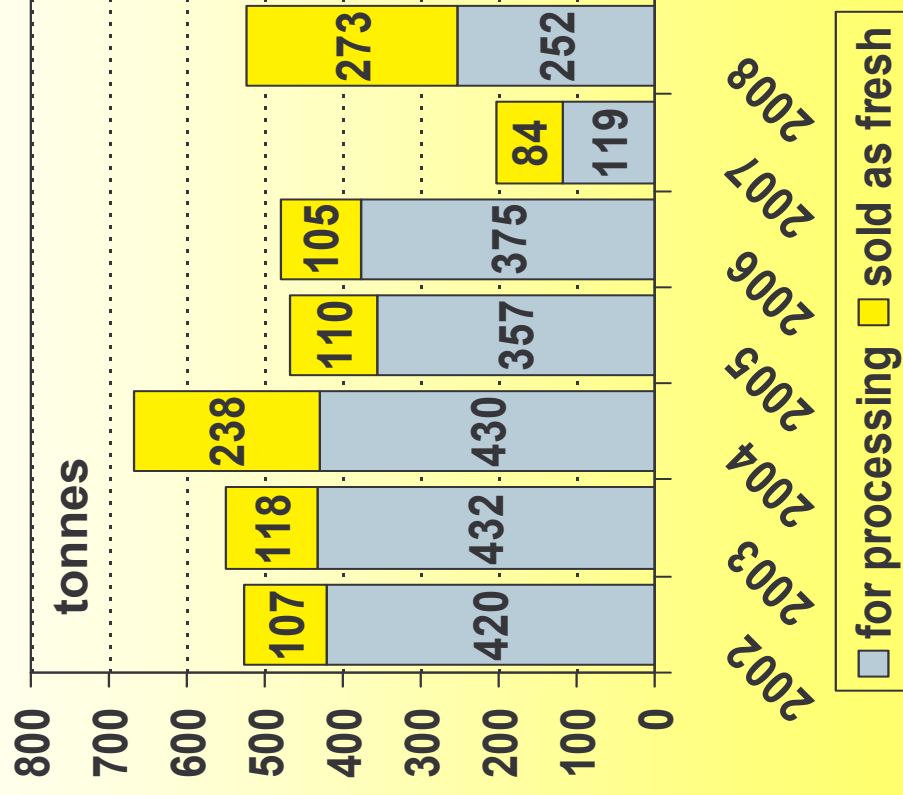
- Good conditions during blossoming
- Fruitsetting
 - Golden Delicious (crop +10%) and red varieties (+2%) with big fruitsetting and a increase crop
 - Gala normal fruitsetting, more crop (+2%) because increase acreage
- Area
 - Surface inceases in Girona
 - Currently the crop in Lerida is bigger than in 2007, in Girona the same as in the year before



Hungary

- Small above average Crop (2005 und 2006 470.000 t)
- After frost in 2007 many trees damaged
- Bad weather during blossoming and weak fruitsetting, affected smaller crop old trees
- More hail damage as normally
- Disease – no problems („Feuerbrand“)

525.000 t (+159%)





Czech Republic:

144.000 t (+27%)

- In spring rain and cool temperatures
- Long blossoming and bad pollination
- After the yield deficit in 2007 only a average harvest
- More hail than normally
- Normal start of season, but 10 days later than 2007



Poland: 2.360.000 t (+115%)

- Changeable weather in spring, therefore no big crop
 - Strong blossom, but in May a lot of rain and less fruitsetting
 - June till middle of July dry and little size
 - Since middle of July more rain and opt. growing conditions
- Apple crop 2,45- 2,5 Mio.?
- Acreage 163.000 ha, share in 100.000 ha market fruit
 - 50.000 ha well-tended, 5.000 ha excellent
- Enough work capacities
 - Travel from Western Europe back to Poland
 - 3 to 4 EUR/hour
 - Season workers from Ukraine/Belarus



Slovenia:

60.000 t (-2%)

- Frost in early March, some damage on Jonagold
- Hail in June (5-10% of entire orchards)
- hail storms in mid July (30% entire orchards)
- Good fruit size, 10% over normal
- Crop starts for Gala 18.-22.8.
Golden 15.-18.9.

Lithuania:

85.000 t (+113%)

- Optimal weather (no Frost, hail or heat)
- Normally blossing and fruit drop
- 12.000 – 15.000 t
Marketfruit cultivation
 - 50% Lobo
 - Other varieties
Idared, Cortland,
Spartan, Shampion

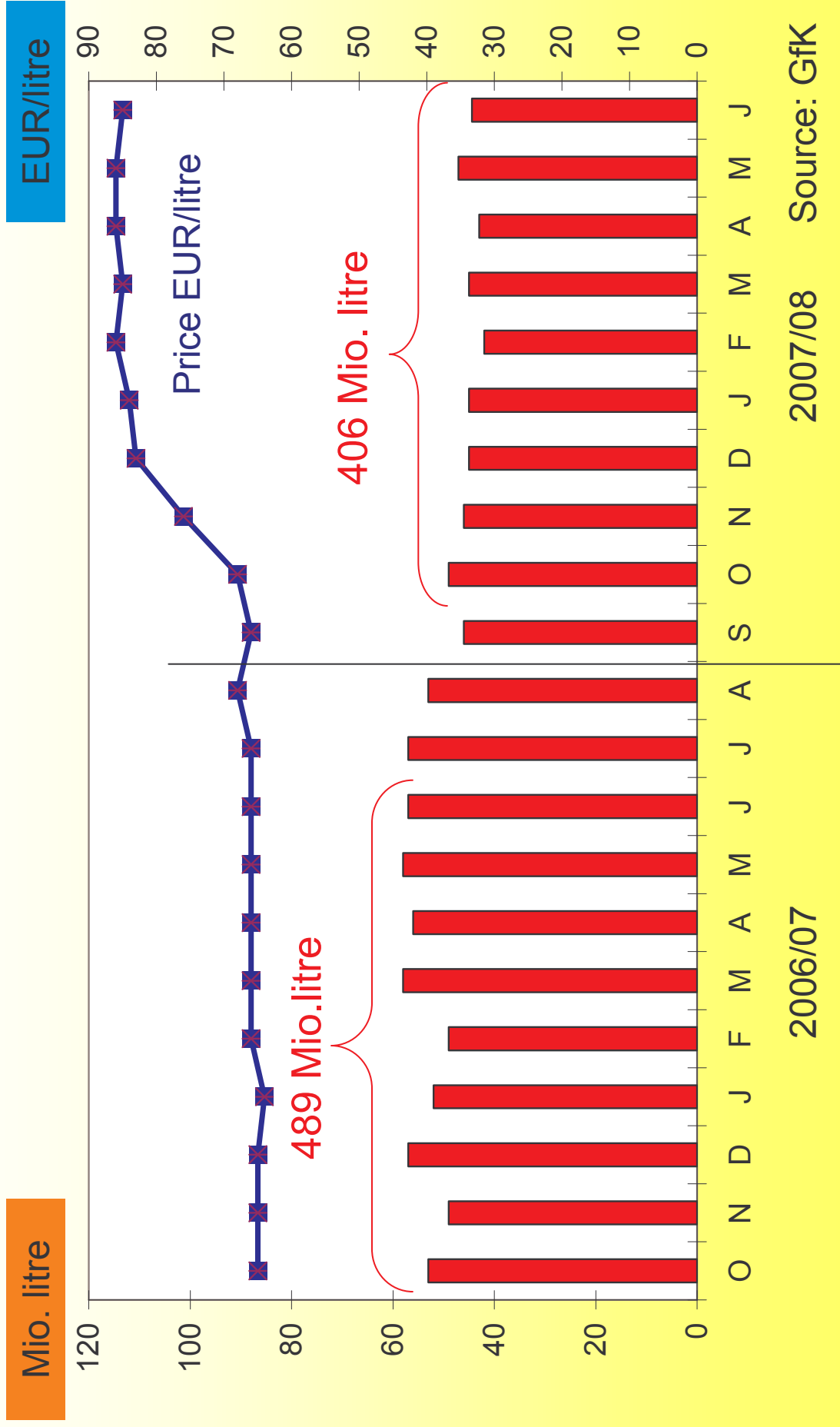


PROGNOSFRUIT 2008 - Kent

Helwig Schwartau, Aug. 08



Germany apple juice consumption





China – apple juice concentrate export

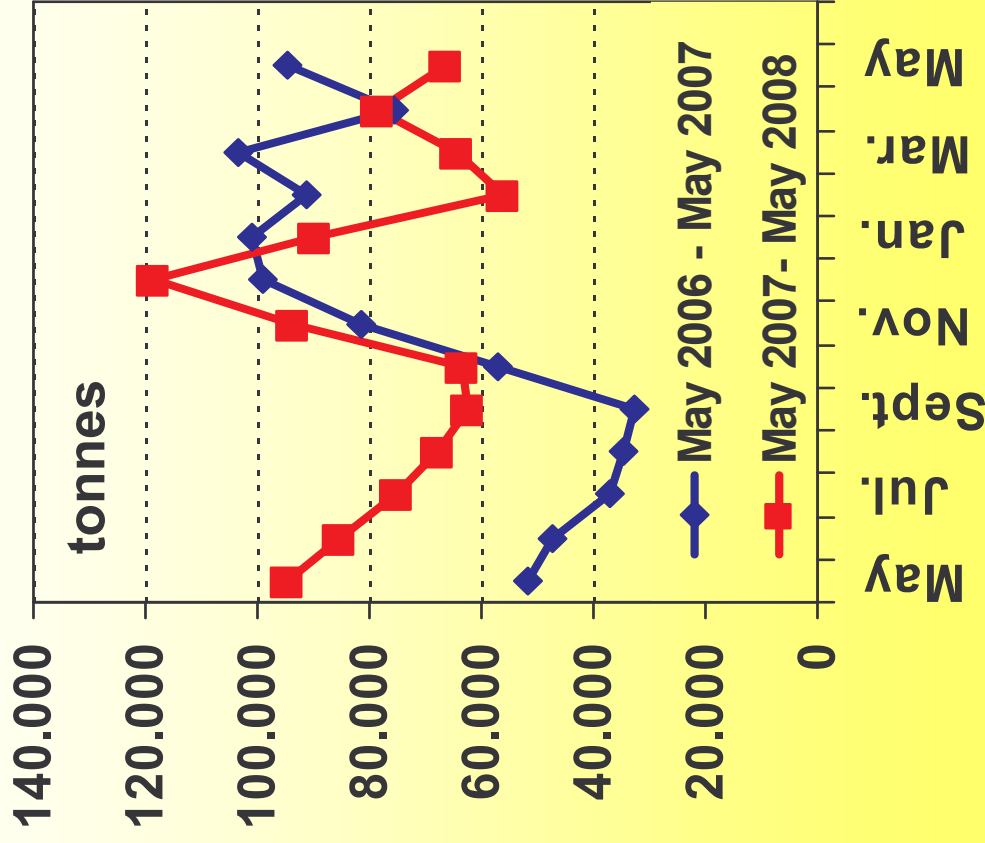
AJC export 1,25 Mio. t ?
beginning forecast 900.000 t

AJC export Jan. till May
break down

2008 = 564.000 t (-24%)

- EU 70.000 t (-50%)
- Germany 17.000 t (-70%)
- Russia 27.000 t (-50%)
- USA 166.400 t (+3%)

End of May stocks about
300.000 t to 350.000 t AJC ?



Source: FOODNEWS



Prospect for apple season 2008/09

- EU apple stocks from crop 2007 cleared
- No surplus of apples from overseas
- Crop 2008 starts 5-10 days later than 2007
- In the first time of sales less price pressure
- But than –
 - More apples in Eastern Europe
 - Processing with price pressure
 - More sales from Western Europe to Russia?
 - Apple from overseas, again less export?



Thanks a lot for your attention