

Pears

Forecast 2008 harvest and overview of markets

Frederic Rosseneu
WAPA



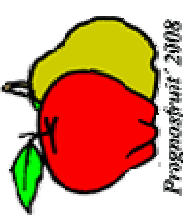
*PROGNOSFRUIT' 2008
UNITED KINGDOM*



2008 Pears Forecast



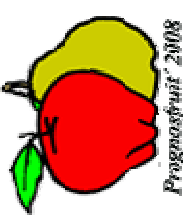
2007 crop forecast reliability



Vilnius 2007 Forecast versus confirmed 2007 crop data

Pears	Forecast 2007	Confirmed 2007	Var 07	Var 06
EU (20)	2.437	2.513	3%	5%
OM	2.384	2.463	3%	5%
NMS	53	50	-6%	4%

2008 Pears Forecast

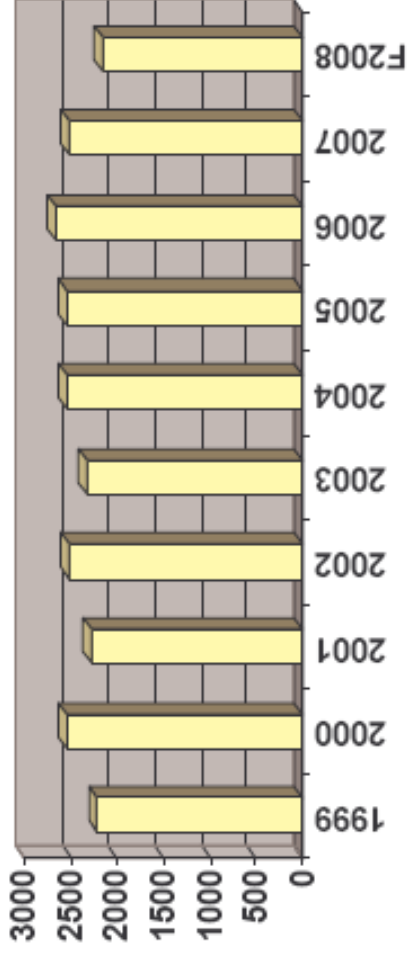


2008 crop forecast – by Member States

Pears	in '000 T
2005	2.535
2006	2.663
2007	2.515
(F)2008	2.160

Pears	
Var 07/08	-14%
Var aver	-16%

EU Pear Production



2008 Pears Forecast



Pear Production by country

x 1000 tons

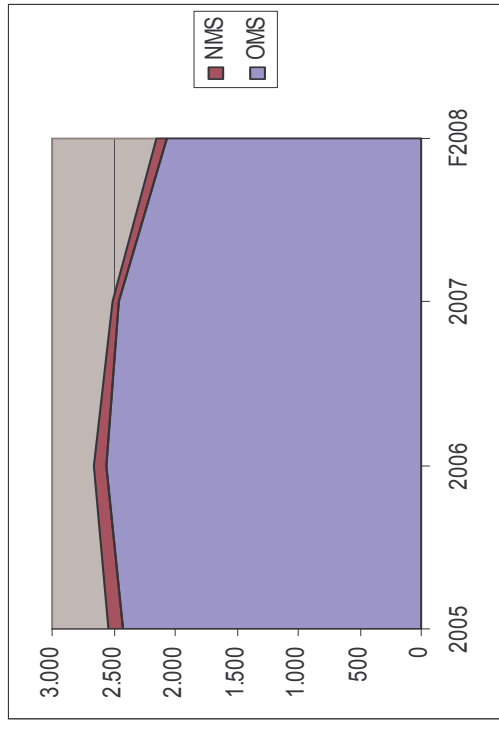
Country	2005	2006	2007 F2008	(1)	(2)
 		229	268	287	177
 		4	4	3	3
 		2	2	3	2
 		5	6	6	5
 		230	246	221	157
 		53	57	56	46
 		56	45	51	54
 		40	39	12	40
 		882	966	922	755
 		2	2	1	1
 		200	234	255	170
 		65	55	31	40
 		130	175	142	177
		0	1	1	1
		608	535	494	508
		2	2	2	1
		27	27	29	25
Total:		2.535	2.664	2.516	2.161
				-14	-16



2008 crop forecast

- Crop in “EU-15” will decrease by 16% while “NMS” experience full recovery
- “OMS/NMS” ratio 96% - 4% split from last year breakdown of 98% - 2%

Pears	2007	2008	var07/08
OMS	2.463	2.073	-16%
NMS	50	87	74%
Total	2.513	2.160	-14%



2008 Pears Forecast

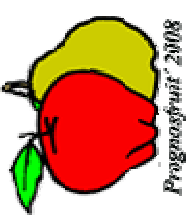
2008 crop forecast – by Member States

... the largest yearly variations are noted in

UP	Var07/08	DOWN	Var07/08
Hungary	227%	Sweden	-70%
Latvia	30%	Belgium	-38%
Poland	29%	France	-29%
Portugal	25%	Czech Republic	-23%
Greece	6%	Netherlands	-33%
		Germany	-19%
		Italy	-18%



2008 Pears Forecast



2008 crop forecast – other MS

... still some MS organizations are not part of the
Prognos process representing 150-200.000T

Pear production in other Member States (based on FAOSTAT data)

Country	x 1000 tons										
	1999	2000	2001	2002	2003	2004	2005	2006	2007	F2008	(1) (2)
Austria	114	130	109	104	175	124	118	117			
Cyprus	1	1	1	1	1	1	1	1			
Luxembourg		2	0	2	1	1	1	1			
Romania	64	71	72	68	104	46	89	62			
Slovenia	10	15	9	13	11	14	8	11			



2008 Pears Forecast

Pear Production by variety

		x 1000 tons					
Variety		2005	2006	2007	F2008	(1)	(2)
		283	328	324	257	-21	-17
		171	139	132	98	-26	-34
		798	826	822	641	-22	-21
		111	103	110	109	-1	1
		105	135	126	84	-33	-31
		7	9	7	6	-23	-28
		115	109	105	102	-3	-7
		61	61	59	34	-43	-44
		35	29	25	21	-16	-30
		125	168	136	173	28	21
		321	350	320	302	-6	-9
		403	407	350	335	-4	-13
Total:		2.535	2.664	2.516	2.161	-14	-16





2008 crop forecast – by varieties



Trends of the main varieties

Varieties	2007	2008	Var 07/08
Abate F	324	257	-21%
Conference	822	641	-22%
Coscia-Ercollini	110	109	-1%
Guyot	105	102	-3%
Rocha	136	173	27%
William BC	320	302	-6%

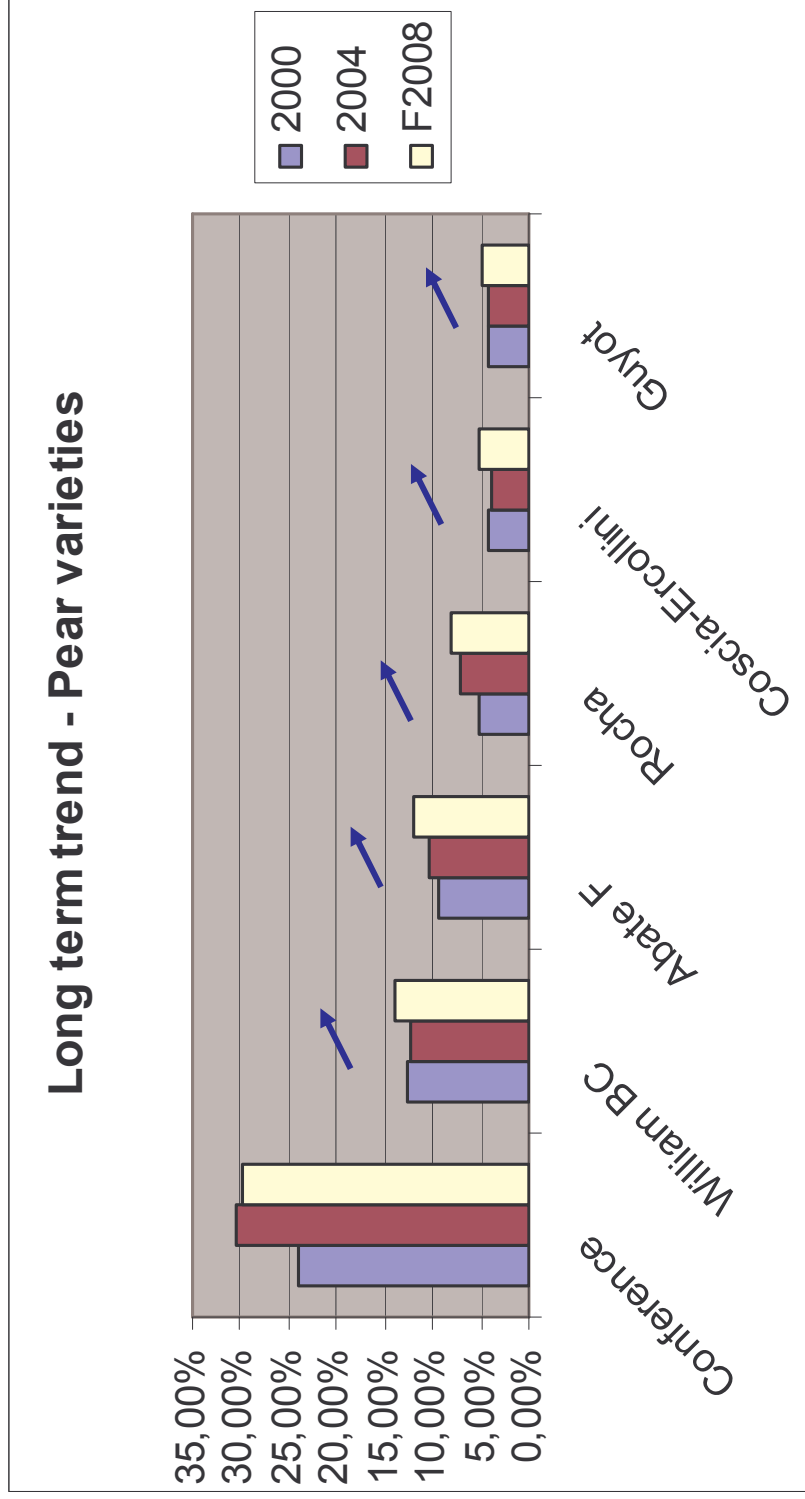
Production breakdown by varieties

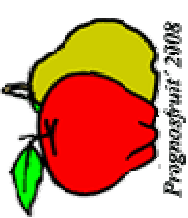
Varieties	Prod 2008	%
Conference	641	29,66%
William BC	302	13,98%
Abate F	257	11,89%
Rocha	173	8,01%
Coscia-Ercollini	109	5,04%
Guyot	102	4,72%
Other	577	26,70%
Total	2.161	100,00%



2008 Pears Forecast

Variety	2000	2004	F2008
Conference	24,10%	30,37%	29,66%
William BC	12,62%	12,40%	13,98%
Abate F	9,51%	10,31%	11,89%
Rocha	5,35%	7,11%	8,01%
Coscia-Ercollini	4,36%	3,75%	5,04%
Guyot	4,17%	4,19%	4,72%



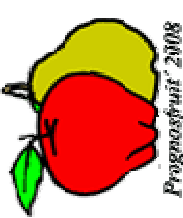


2008 crop forecast – carryover and evolution of stocks

... stocks end of July similar to last year (US stocks cleared)

Pear Stocks (Ton)	1/07/2008	1/07/2007	1/06/2008	1/06/2007	Movement	2008/2007
Belgium	41.000	14.900	44.000	27.200	-3000	175,2%
Denmark	0	0	0	0	0	
France	77	359	222	749	-145	-78,6%
Germany	0	0	50	0	-50	
Italy	0	0	0	0	0	
Poland	0	0	0	0	0	
Spain (Catalonia)	792	2.724	5.720	10.424	-4928	-70,9%
Switzerland	0	0	1	0	-1	
The Netherlands			10.000	16.000	-10000	
United Kingdom	0	0	100	0	-100	
TOTAL	41.869	17.983	60.093	54.373	-18224	132,8%

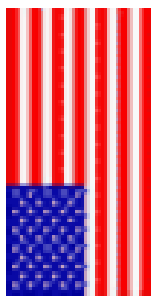
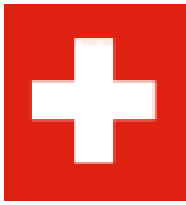
2008 Pears Forecast



2008 crop forecast – other NH countries

... on average production in selected other NH countries are down by 10%

in '000T	2007	2008	var 07/08	var aver
Switzerland	27	16	-43%	-38%
Turkey	380	361	-5%	-5%
USA	451	395	-12%	-33%

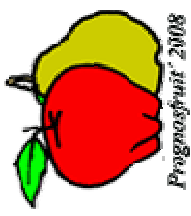


2008 Pears Forecast



USA Pears Production

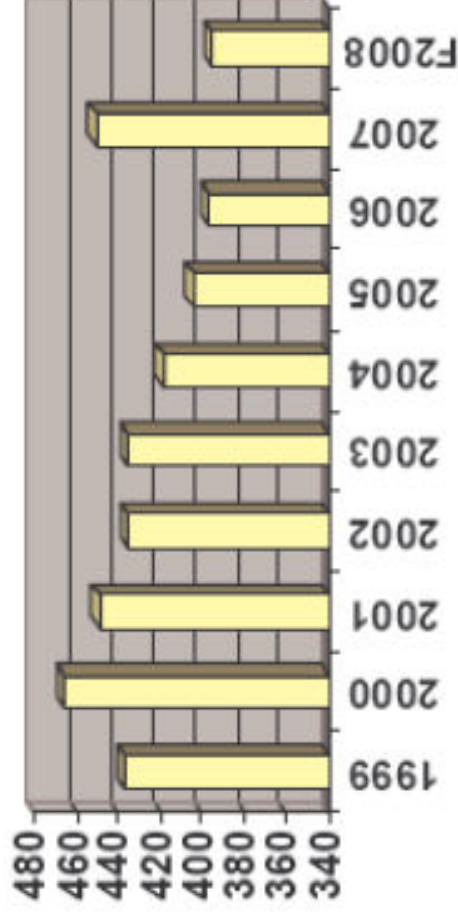
(production only destined for the fresh market)

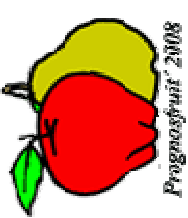


USA

x 1000 tons

Variety	1999	2000	2001	2002	2003	2004	2005	2006	2007	F2008
Anjou	201	245	224	219	218	188	209	174	215	170
Bartletts / William BC	147	143	125	126	128	136	113	121	142	128
Bosc	66	55	74	65	67	69	58	69	56	62
Doyenne du Comice	5	4	6	5	5	4	6	5	5	6
Red Anjou	10	12	12	13	14	14	15	15	18	17
Seckel	2	1	1	1	1	1	1	1	2	1
Other Reds	1	1	1	1	1	1	0	1	1	2
Other Varieties	5	5	6	6	2	6	2	12	11	10
Total USA:	437	466	449	436	436	419	404	397	451	395

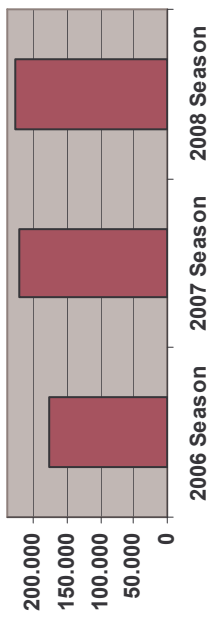




EU exports trends

Total export of the Member States (September April)

Total exports by the MS



MS	2006 Season	2007 Season	2008 Season
Total	176.044	222.501	227.862

Export destinations >2.000 T

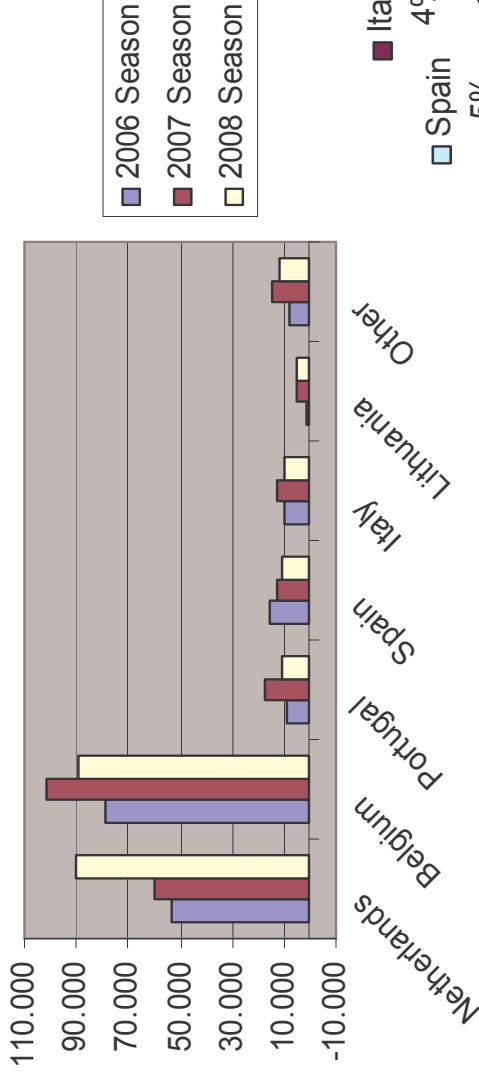
Destinations	2006 Season	2007 Season	2008 Season	% for 08
Russian Federation	131.431	162.257	168.545	73,97%
Norway	14.610	14.524	19.858	8,71%
Brazil	7.388	11.222	8.482	3,72%
Belarus	3.419	4.652	4.863	2,13%
Croatia	3.302	4.798	4.113	1,81%
Ukraine	724	2.462	3.520	1,54%
Libyan Arab Jamahiriya	1.543	2.749	2.539	1,11%
Melilla	2.014	1.846	2.121	0,93%
Bosnia and Herzegovina	969	2.677	1.951	0,86%
Switzerland	2.194	2.822	1.548	0,68%
Other	8.451	12.494	10.324	4,53%
Total	176.044	222.501	227.862	100,00%

2008 Pears Forecast

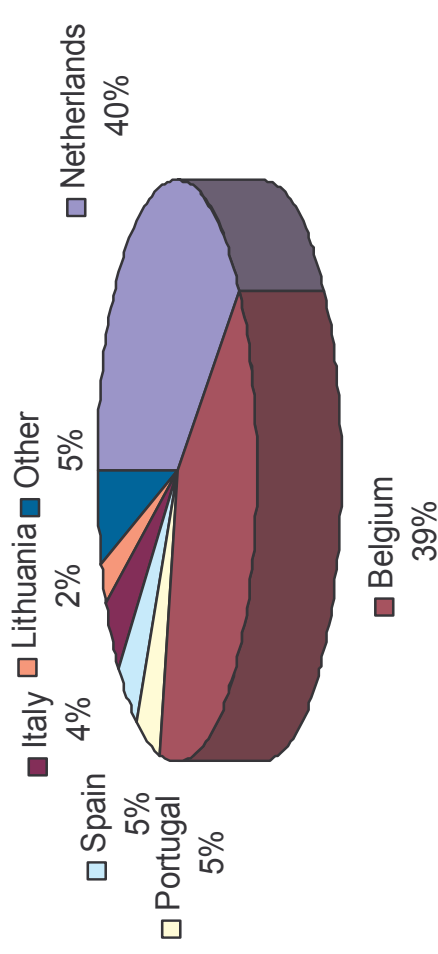
EU exports trends

Comparison period → September to April

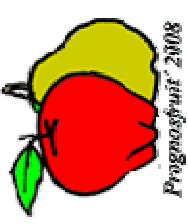
Top 6 MS exports



Top 6 MS exports - 2008



2008 Pears Forecast



Update SH 2008 crop

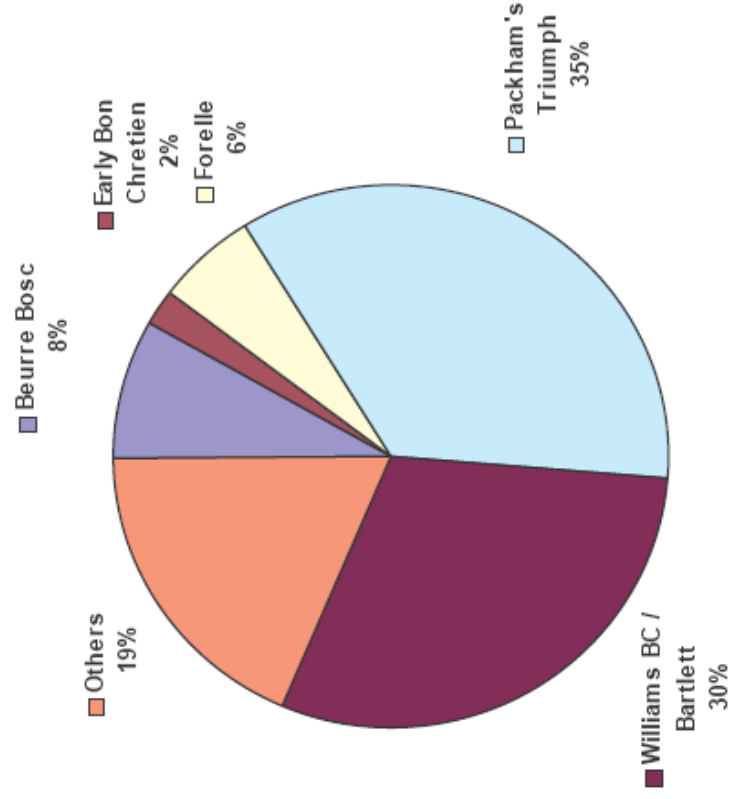
... forecast released now yearly by WAPA in Berlin (February),
updated August

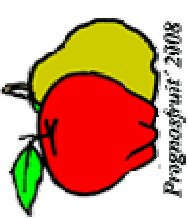
Pears		x 1000 tons					
Country	2003	2004	2005	2006	2007	2008	
Argentina	530	467	530	750	739	723	(1) (2)
Australia	777	142	151	142	135	146	-2,25 7,38
Chile	247	0	201	195	194	189	7,97 1,84
New Zealand	2	13	11	9	10	11	-2,40 -3,88
South Africa	63	329	316	324	359	342	14,81 12,3
Total	1.619	950	1.209	1.420	1.436	1.410	-4,77 2,64
							-1,82 4,04

2008 Pears Forecast

Update SH crop

Variety	2003	2004	2005	2006	2007	2008
Beurre Bosc	80	74	86	105	118	117
Early Bon Chretien		19	22	28	31	30
Forelle		54	58	71	78	82
Packham's Triumph	212	273	402	460	487	490
Williams BC / Bartlett	298	330	394	445	463	425
Others	1.028	201	248	311	259	261
Total:	1.619	950	1.209	1.420	1.436	1.405





SH export 2008

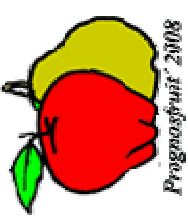
... SH export trends to the EU up by 4,7%
(SHAFPE data up to week 30)

	2007	2008	Var 07/08
EU	289	303	4,7%
USA	84	61	-27,3%
Russia	106	129	21,2%
M-E	9	12	32,7%
Asia	17	13	-22,6%
Total SH exp	505	517	2,4%

forecasted export potential season 2008 : +/- 720.000 T (72% of target)

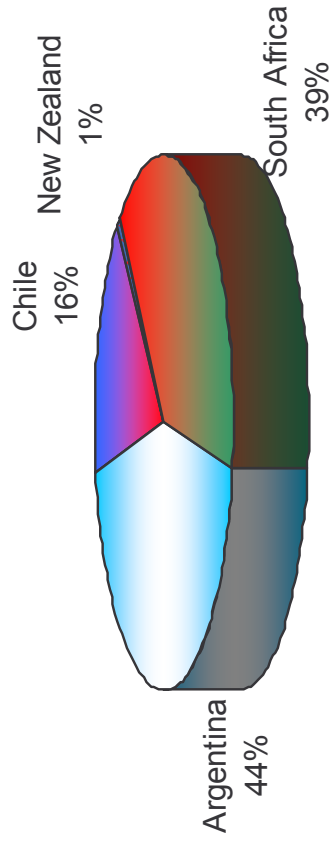
2008 Pears Forecast

SH export 2008

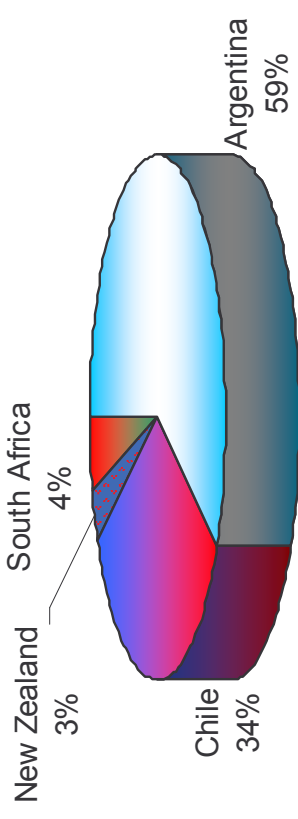


...SH export trends EU- US

EU



US



2008 Pears Forecast

In summary

- Total production EU down by 14% to 2007 and down by 16% on average
- Other NH crop down in total by 10%
- SH export to the EU so far up by 4,7%



2008 Pears Forecast