



Pears – Review of 2007/08 season

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Successful pear season 2007/08

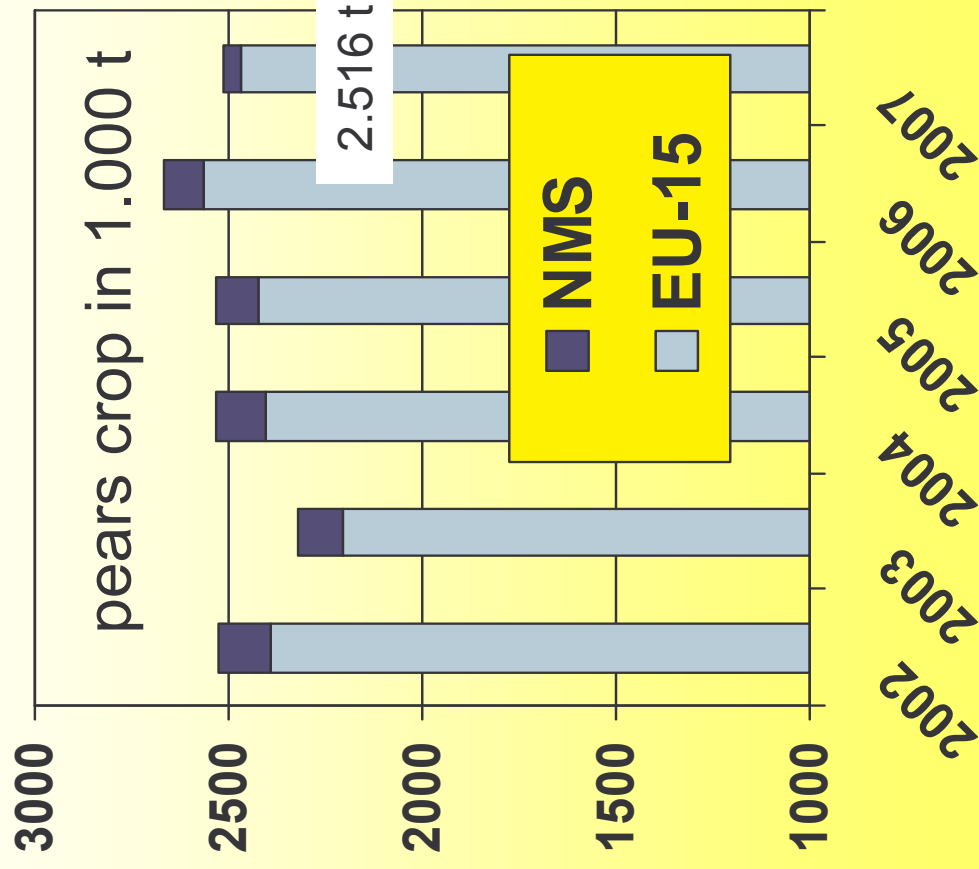
Smallest crop since 2003,
150.000 t less vs. 06/07

Considerable qualities,
sales increase in EU-15

More sales to East. Europe

Weaker crops at competition
products

Delayed start from the
oversea pears





Market end results for table-pears in EU-15

1.000 t	2004/05	2005/06	2006/07	2007/08f
Market production	2.407	2.422	2.562	2.465
+ Import EU ¹⁾	370	306	338	357
- Export EU ¹⁾	216	261	329	350
= Consumption ²⁾	2.561	2.466	2.570	2.472
Per capital (kg)	6,6	6,3	6,6	6,3

Note: 1) 1.8. - 31.7. - 2) Without market losses, incl. processing from table-pears

Source: ZMP / EUROSTAT - f = forecast

Since 2006/07 balance of trade for the EU-15
(before 2003/04 only 150.000 t exported)

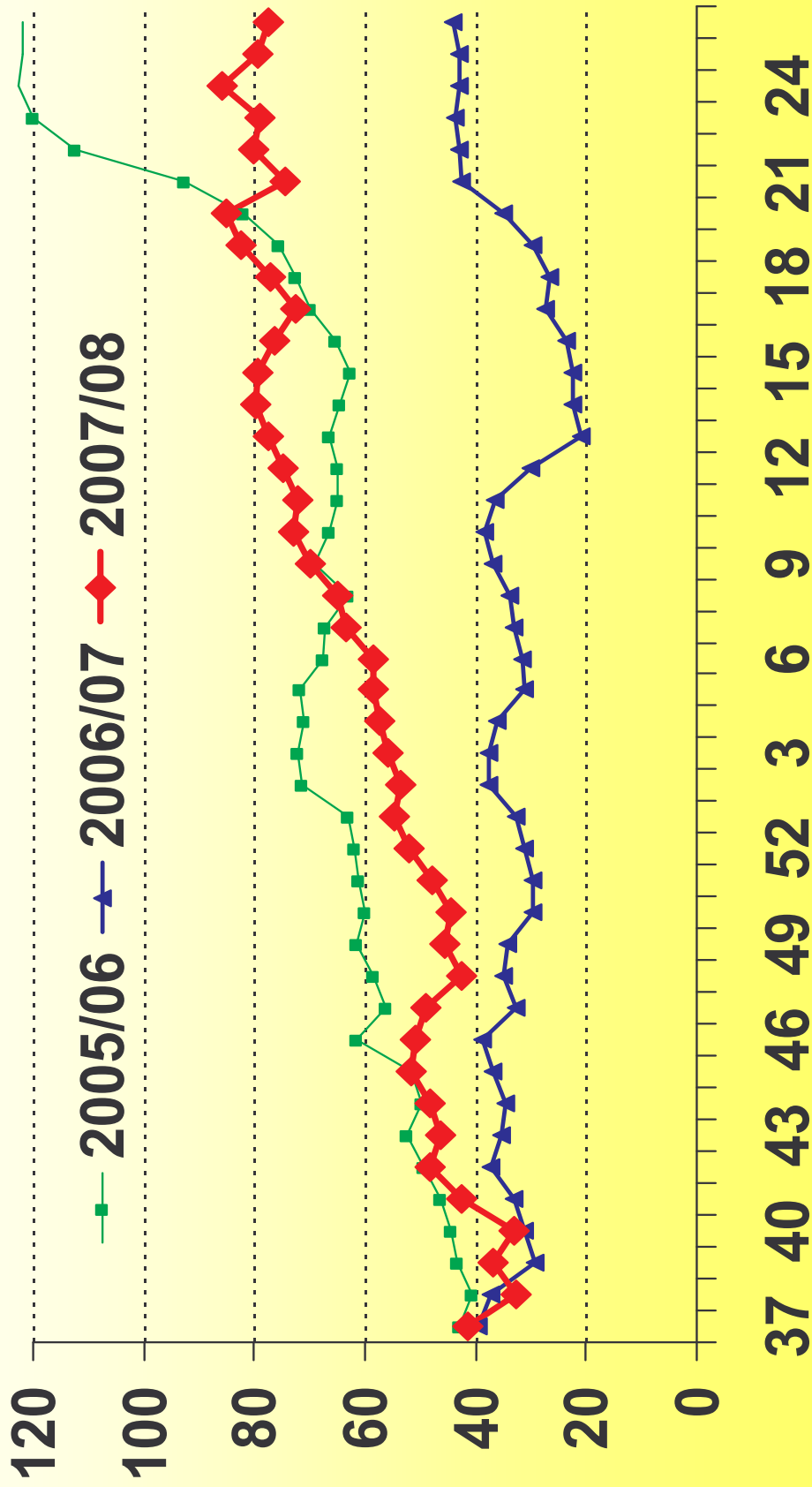


Pears - Different Trend in pears consumption

Country	Period	2007/08 vs. 06/07%	
		price	volume
DE	Aug-Jun	+ 6,6	- 3,1
AT	Mai-April	+ 18,1	- 7,6
BE	Aug-Jun	- 0,7	+ 6,8
UK	52 w/e jun17	+ 0,7	+ 4,8
NL	52 w/e jun17	+ 2,4	+ 13,9
IT	Aug-März	+ 9,4	- 2,6
ES	Aug-April	+ 7,0	+ 8,1

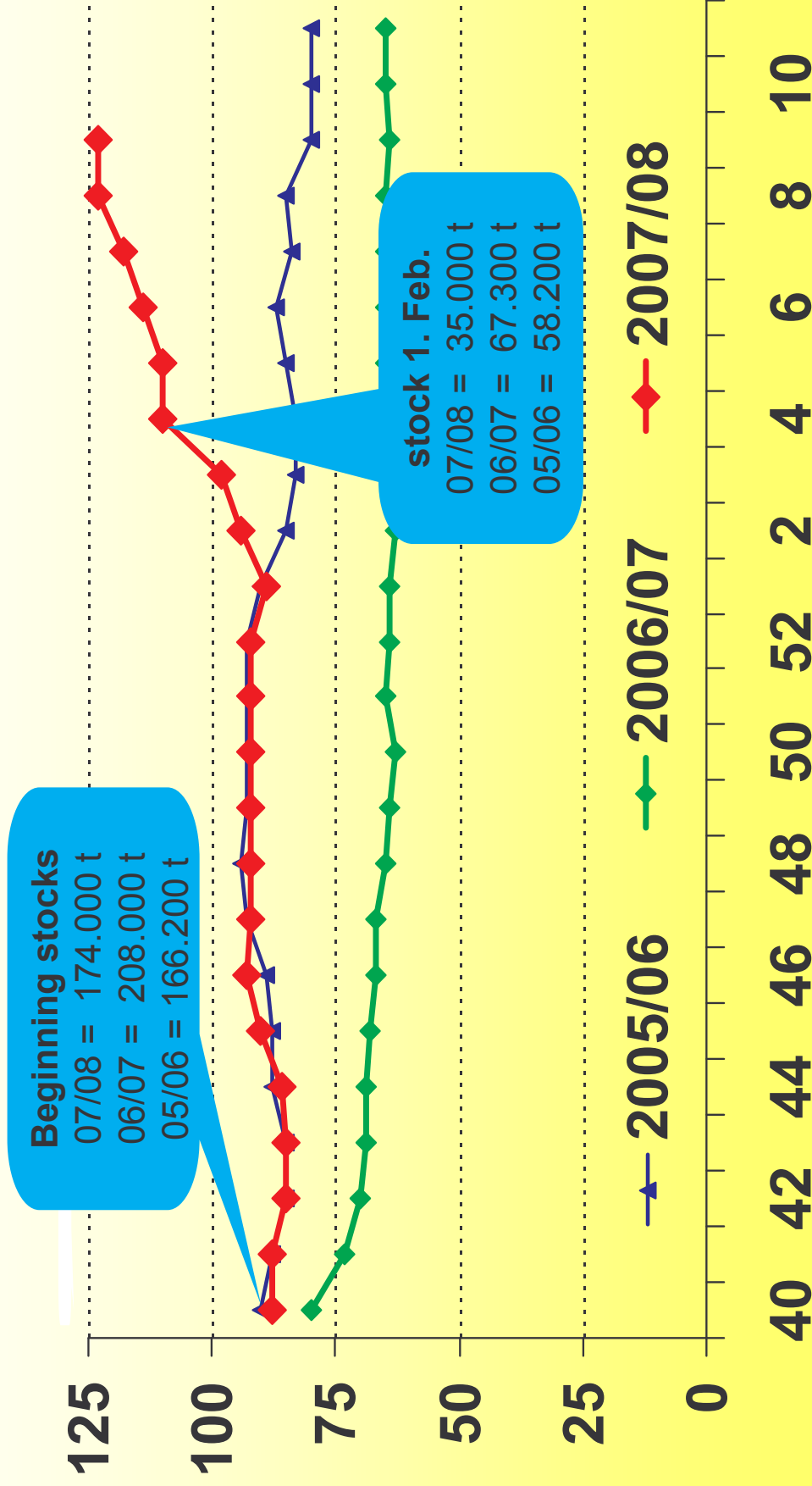


Pears: Netherlands Veilinge, prices Conference 55-65mm (EUR/100kg)





Pears: Italy price Abate Fetel 70-75mm (EUR/100kg)





Pears: Consumer prices (Italy)

At the end of season
prices increase above
15% vs. 2007

Consumption in Italy
stabilizes at a lower level:

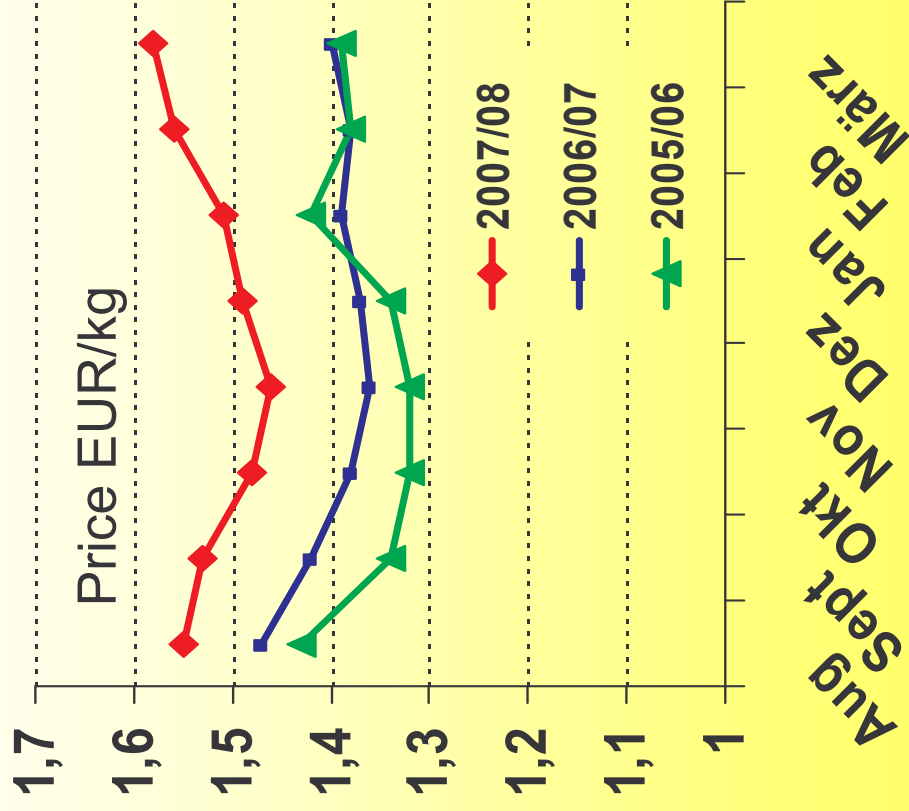
August- März:

Ø 2005/06 - 2007/08

268.000 t

Ø 2001/02 - 2003/04

292.000 t





Russia: Pear imports October till March

(1000 t)	2006	2007	Oct-March 06/07	Oct-March 07/08	± %
World	327	381	271	280	+3
Belgium	83	122	78	99	+ 27
Argentina	78	97	41	45	+10
Netherlands	36	55	34	41	+20
China	48	36	44	34	-22
South Africa	10	16	4	9	+125
France	18	11	17	11	-35
Spain	16	9	15	9	-40

Source: GTA



EU – pear imports from South Hemisphere

EU-25 imported (SHAFPE)

2008 = 302.000 t

2007 = 286.000 t

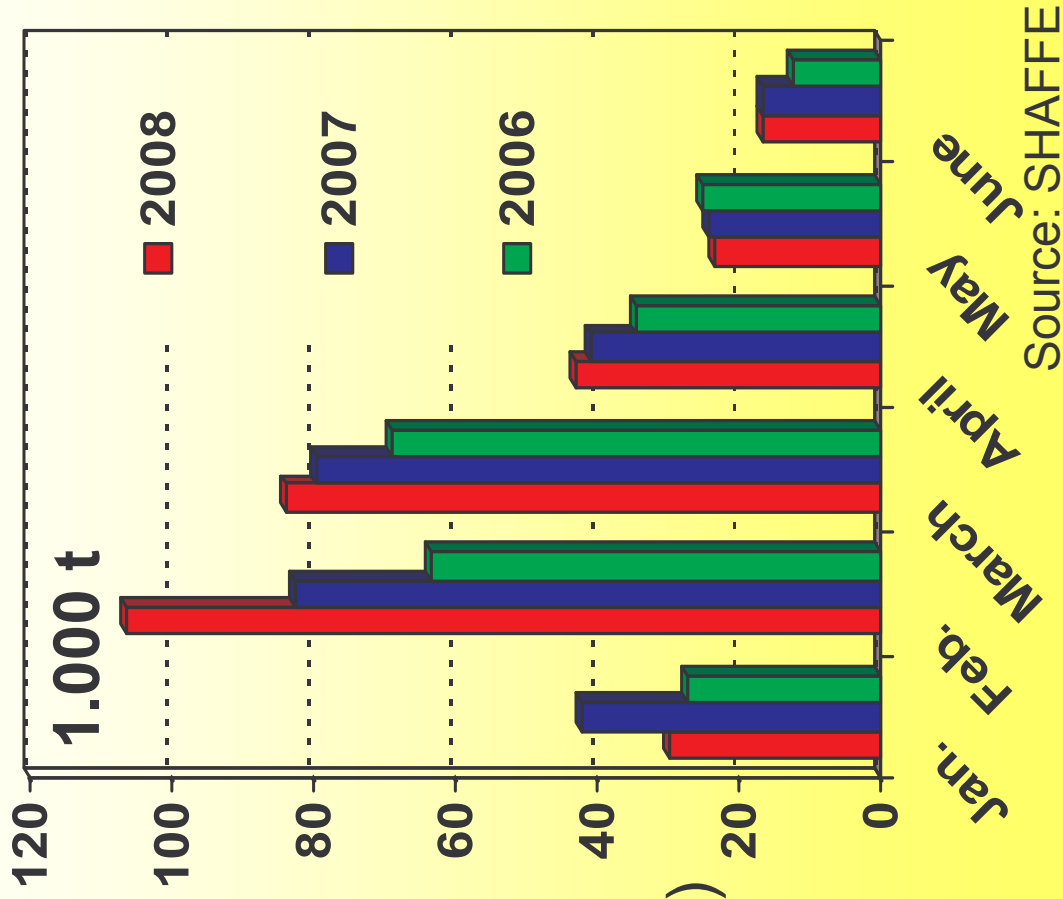
2006 = 231.000 t

Western Europe (TWMC)

Argent. 155.000 t (145.000 t)

Chile 56.000 t (46.000 t)

South Afr. 83.000 t (81.000 t)



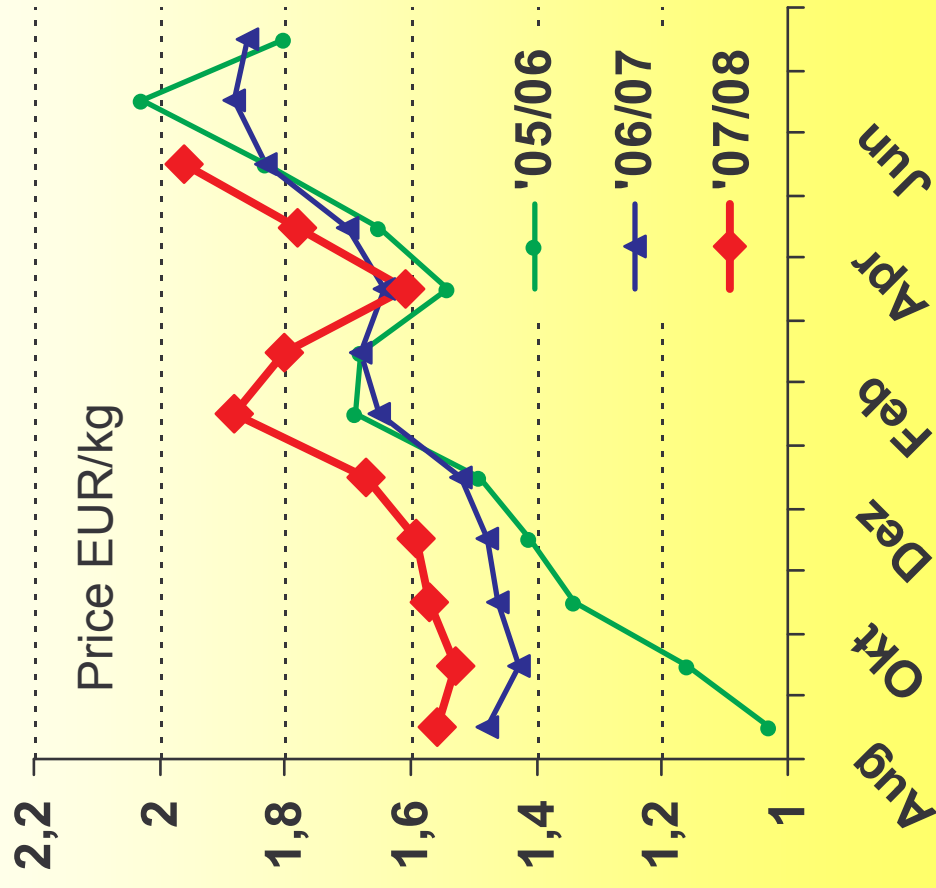


Pears: Consumer prices (Germany)

Price 2007/08 week for
week above the last
years

In Feb./March 2008 the
price decreased because
oversea forced the
export, special argent.
Williams

Consumption stagnates
2007 = 131.000 t
Ø 2003-2006 = 135.000 t





Conclusion:

The season 2007/08 was very successful

Thanks a lot for your attention