

EUROPÊCH' 2020



SUMMARY OF THE 2019 EUROPEAN HARVEST

& 2020 HARVEST FORECAST:

Peaches - Flat Peaches - Nectarines - Pavia

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SUMMARY OF THE EUROPEAN HARVEST

Peach / Nectarine / Pavia 2019

Unit: tons.

| | Round peach | Flat Peach | Nectarine | Pavia | TOTAL Peach(R + P)+ Nectarine |
|----------------------------|------------------|----------------|------------------|----------------|--------------------------------------|
| ITALY | 534 212 | NR | 608 653 | 92 389 | 1 142 865 |
| Piedmont / Lombardy / Lig | 47 522 | NR | 81 764 | 1 148 | 129 286 |
| Veneto / Friuli / Julienne | 22 251 | NR | 28 035 | 1 840 | 50 286 |
| Emilia Romagna | 58 026 | NR | 157 020 | 11 878 | 215 046 |
| Central Italy | 32 688 | NR | 33 199 | 1 859 | 65 887 |
| Southern Italy | 373 725 | NR | 308 635 | 75 664 | 682 360 |
| GREECE | 216 410 | NR | 119 490 | 451 930 | 335 900 |
| SPAIN | 342 913 | 323 226 | 636 594 | 303 462 | 1 302 733 |
| Andalusia | 30 709 | 315 | 65 466 | 4 925 | 96 490 |
| Valencia | 8 000 | 7 000 | 13 000 | 0 | 28 000 |
| Murcia | 50 000 | 90 000 | 83 000 | 65 000 | 223 000 |
| Catalonia | 122 305 | 133 890 | 226 408 | 24 667 | 482 603 |
| Rioja/Navarra/Aragon | 98 149 | 78 886 | 189 480 | 175 745 | 366 515 |
| Extremadura | 33 735 | 12 050 | 57 540 | 5 415 | 103 325 |
| Other Spain | 15 | 1 085 | 1 700 | 27 710 | 2 800 |
| FRANCE | 106 034 | NR | 91 585 | 5 186 | 197 619 |
| Languedoc-Roussillon | 43 615 | NR | 43 170 | 4 010 | 86 785 |
| Rhône-Alpes | 18 832 | NR | 11 949 | 0 | 30 781 |
| P.A.C.A. | 30 987 | NR | 27 747 | 1 099 | 58 734 |
| Other regions | 12 600 | NR | 8 719 | 77 | 21 319 |
| TOTAL EUROPE 2019 | 1 199 569 | 323 226 | 1 456 322 | 852 967 | 2 979 117 |

* To date, only Spain identifies flat peaches apart,

for the other countries, the volumes are very low and are integrated with the peach figures

EUROPE

Peach / Nectarine / Pavia 2020 Forecasts

Unit: tons.

| | Peach | Flat Peach | Nectarine | Pavia | TOTAL <i>Peach(R + P)+ Nectarine</i> |
|--------------------------|------------------|----------------|------------------|----------------|---|
| Italy | 422 082 | NR | 397 623 | 51 835 | 819 705 |
| Greece | 190 000 | NR | 113 500 | 415 000 | 303 500 |
| Spain | 295 118 | 281 959 | 537 033 | 300 803 | 1 114 110 |
| France | 96 763 | NR | 86 170 | 4 657 | 182 933 |
| TOTAL EUROPE 2020 | 1 003 963 | 281 959 | 1 134 326 | 772 295 | 2 420 248 |

* To date, only Spain identifies flat peaches apart,

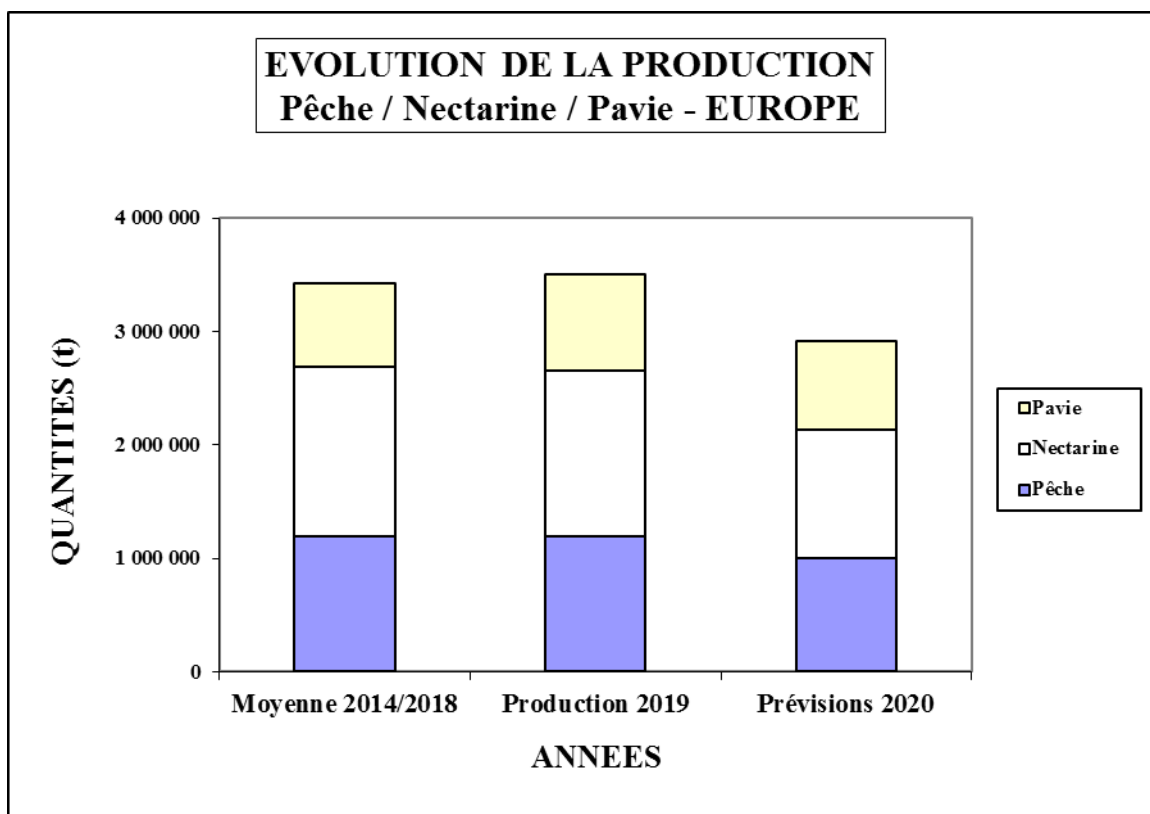
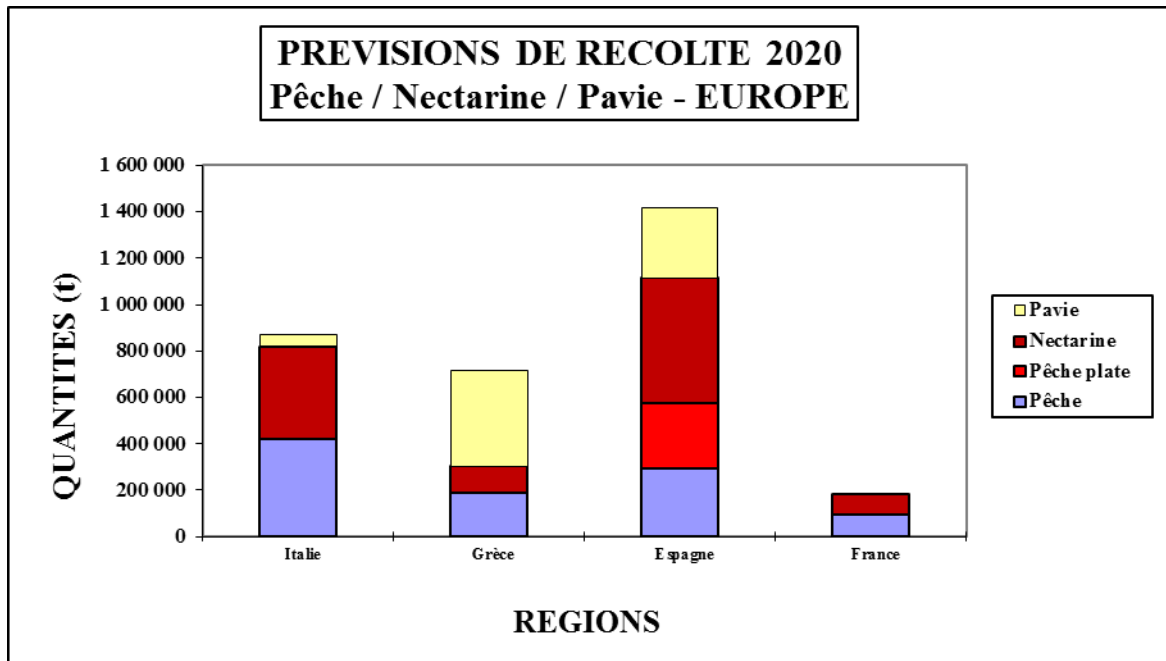
for the other countries, the volumes are very low and are integrated with the peach figures

| | | | | | |
|--------------------------|-----------|---------|-----------|---------|-----------|
| 2019 PRODUCTION | 1 199 569 | 323 226 | 1 456 322 | 852 967 | 2 979 117 |
| AVERAGE 2014-2018 | 1 195 777 | 303 815 | 1 490 592 | 739 604 | 2 990 184 |

| | | | | | |
|---|------------------|-----------------|------------------|-----------------|------------------|
| VARIATION 2020/2019 | - 195 606 | - 41 267 | - 321 996 | - 80 672 | - 558 869 |
| | <i>- 16%</i> | <i>- 13%</i> | <i>- 22%</i> | <i>- 9%</i> | <i>- 19%</i> |
| VARIATION 2019 / Average 2014-2018 | - 191 814 | - 21 856 | - 356 266 | + 32 691 | - 569 936 |
| | <i>- 16%</i> | <i>- 7%</i> | <i>- 24%</i> | <i>+ 4%</i> | <i>- 19%</i> |

EUROPE

Peach / Nectarine / Pavia 2020 Forecasts



GREECE

Peach / Nectarine / Pavia 2020 Forecasts

Unit: tons.

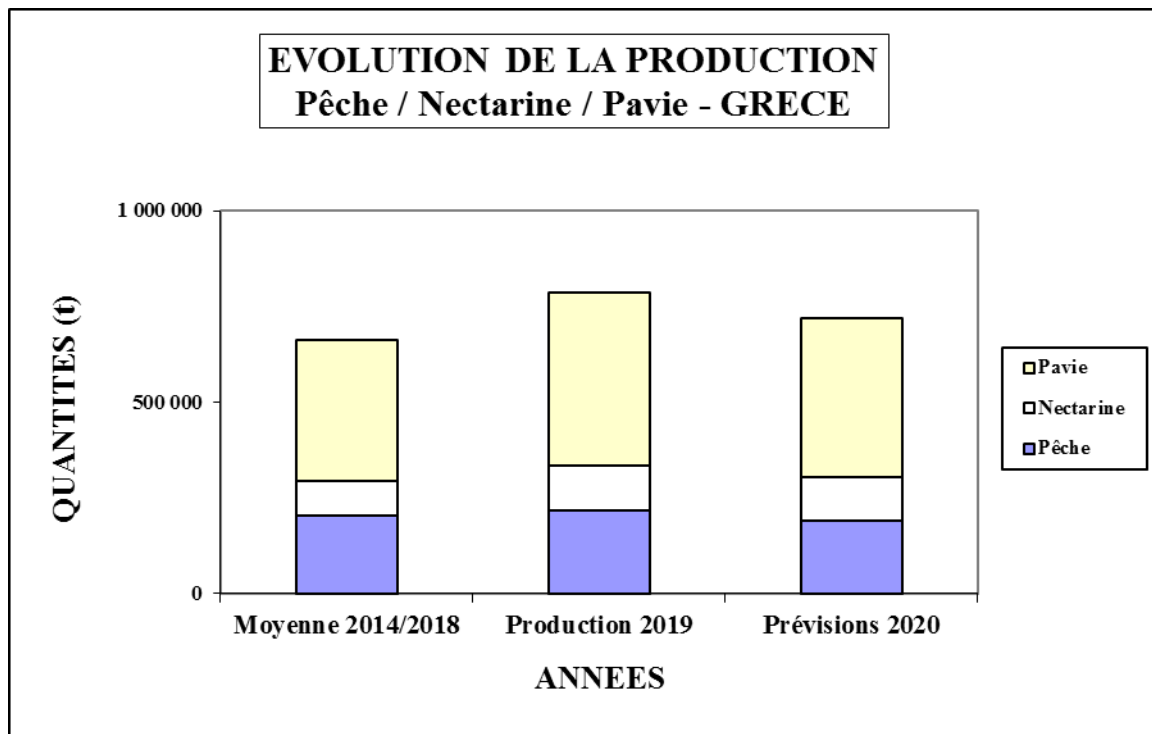
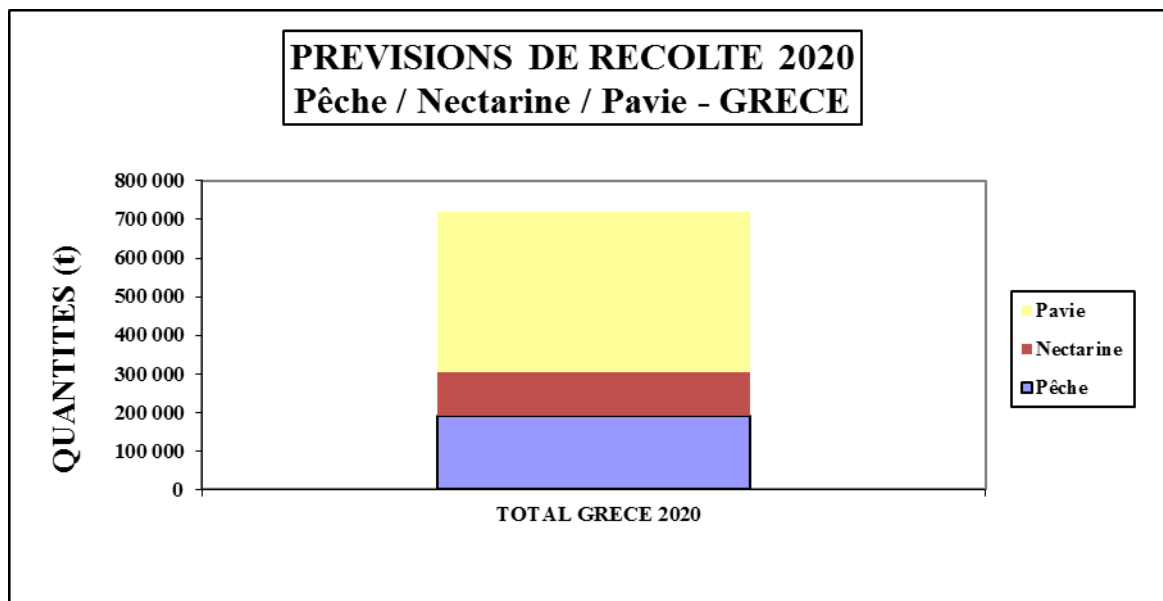
| | Peach | Nectarine | Pavia | TOTAL <i>Peach + Nectarine</i> |
|--------------------------|----------------|------------------|----------------|--|
| TOTAL GREECE 2020 | 190 000 | 113 500 | 415 000 | 303 500 |

| | | | | |
|-------------------------------|---------|---------|---------|---------|
| 2019 PRODUCTION | 216 410 | 119 490 | 451 930 | 335 900 |
| AVERAGE PROD 2014-2018 | 202 660 | 93 080 | 367 400 | 295 740 |

| | | | | |
|---|-----------------|-----------------|-----------------|-----------------|
| VARIATION 2020/2019 | - 26 410 | - 5 990 | - 36 930 | - 32 400 |
| | - 12% | - 5% | - 8% | - 10% |
| VARIATION 2019 / Average 2014-2018 | - 12 660 | + 20 420 | + 47 600 | + 7 760 |
| | - 6% | + 22% | + 13% | + 3% |

GREECE

Peach / Nectarine / Pavia 2020 Forecasts



SPAIN

Peach / Nectarine / Pavia 2020 Forecasts

Unit: tons.

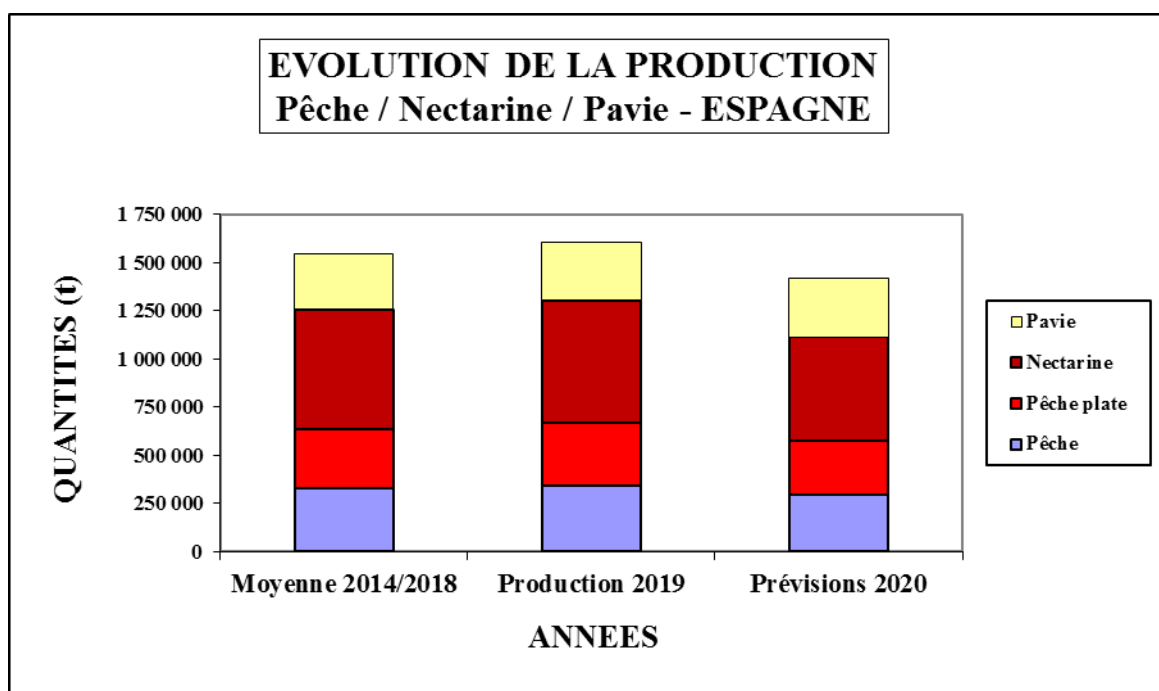
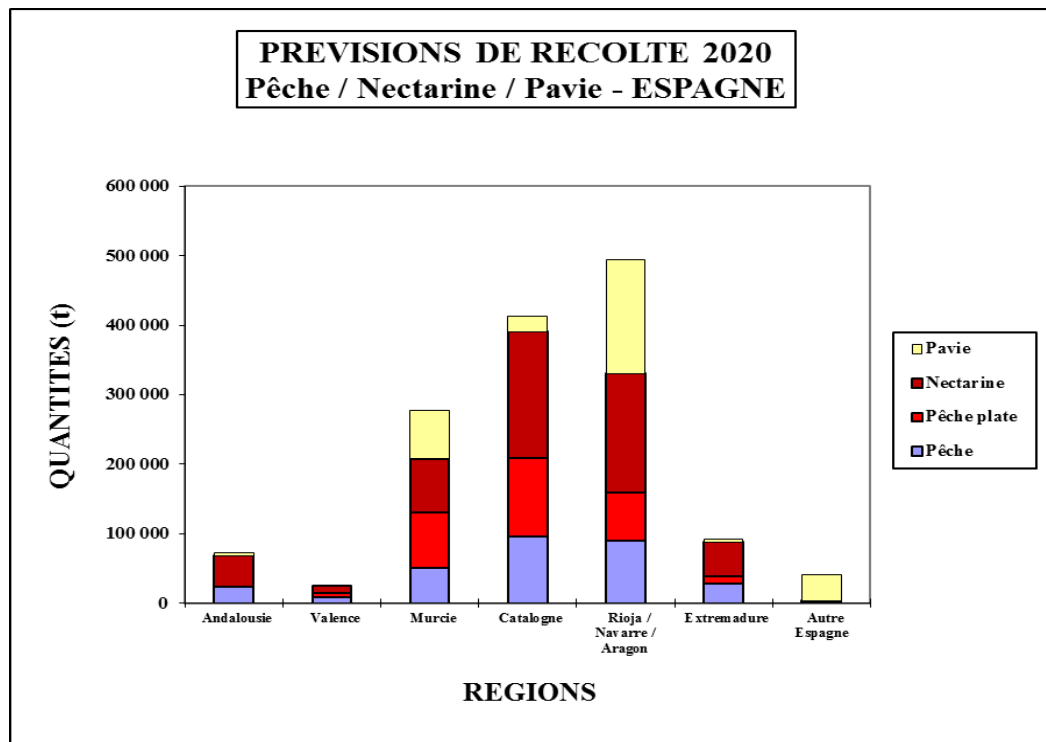
| | Peach | Flat Peach | Nectarine | Pavia | TOTAL <i>Peach + Nectarine + pp</i> |
|---------------------------------|----------------|-------------------|------------------|----------------|---|
| Andalusia | 23 563 | 159 | 44 919 | 3 227 | 68 641 |
| Valencia | 7 900 | 6 300 | 10 400 | 0 | 24 600 |
| Murcia | 50 000 | 80 000 | 78 000 | 70 000 | 208 000 |
| Catalonia | 95 490 | 113 630 | 181 500 | 22 430 | 390 620 |
| Rioja / Navarra / Aragon | 89 440 | 69 528 | 171 705 | 163 144 | 330 673 |
| Extremadura | 28 675 | 10 242 | 48 909 | 4 602 | 87 826 |
| Other Spain | 50 | 2 100 | 1 600 | 37 400 | 3 750 |
| TOTAL SPAIN 2020 | 295 118 | 281 959 | 537 033 | 300 803 | 1 114 110 |

| | | | | | |
|-------------------------------|---------|---------|---------|---------|-----------|
| 2019 PRODUCTION | 342 913 | 323 226 | 636 594 | 303 462 | 1 302 733 |
| AVERAGE PROD 2014-2018 | 327 915 | 308 815 | 618 070 | 292 238 | 1 254 800 |

| | | | | | |
|---|-----------------|-----------------|-----------------|----------------|------------------|
| VARIATION 2020/2019 | - 47 795 | - 41 267 | - 99 561 | - 2 659 | - 188 623 |
| | - 14% | - 13% | - 16% | - 1% | - 14% |
| VARIATION 2019 / Average 2014-2018 | - 32 797 | - 26 856 | - 81 037 | + 8 565 | - 140 690 |
| | - 10% | - 9% | - 13% | + 3% | - 11% |

SPAIN

Peach / Nectarine / Pavia 2020 Forecasts



ITALY

Peach / Nectarine / Pavia 2020 Forecasts

Unit: tons.

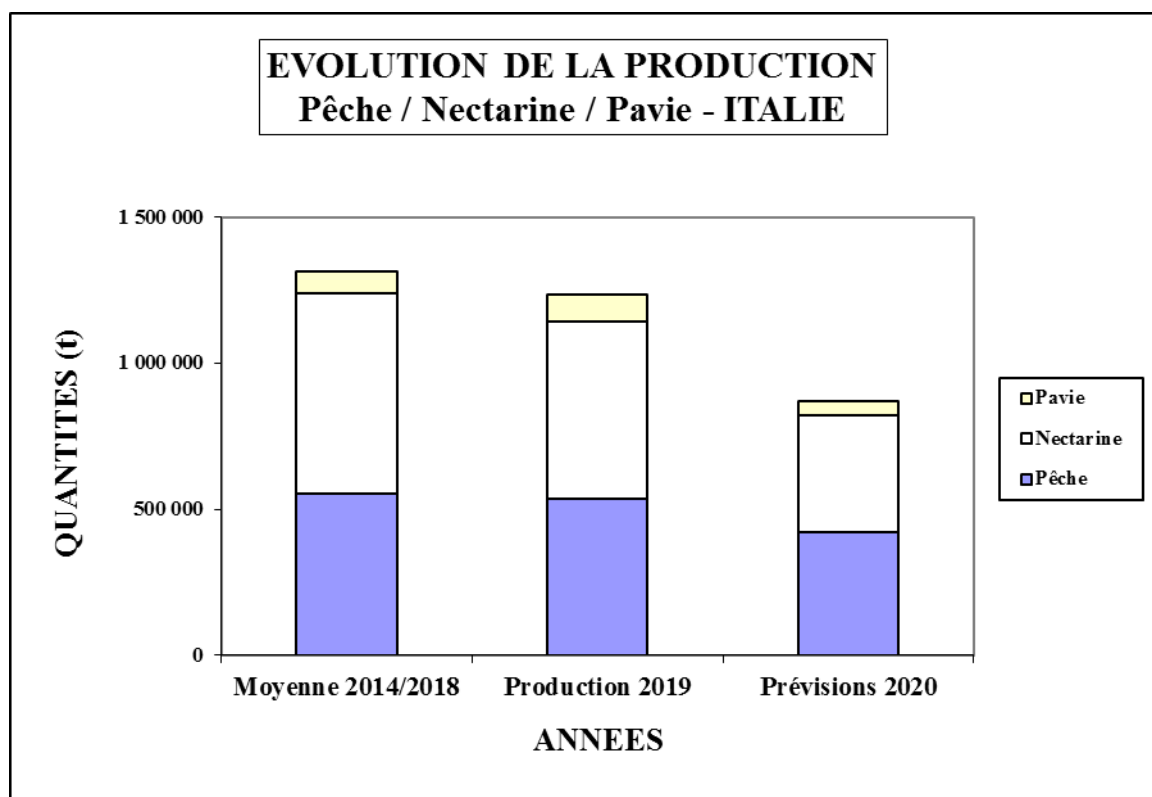
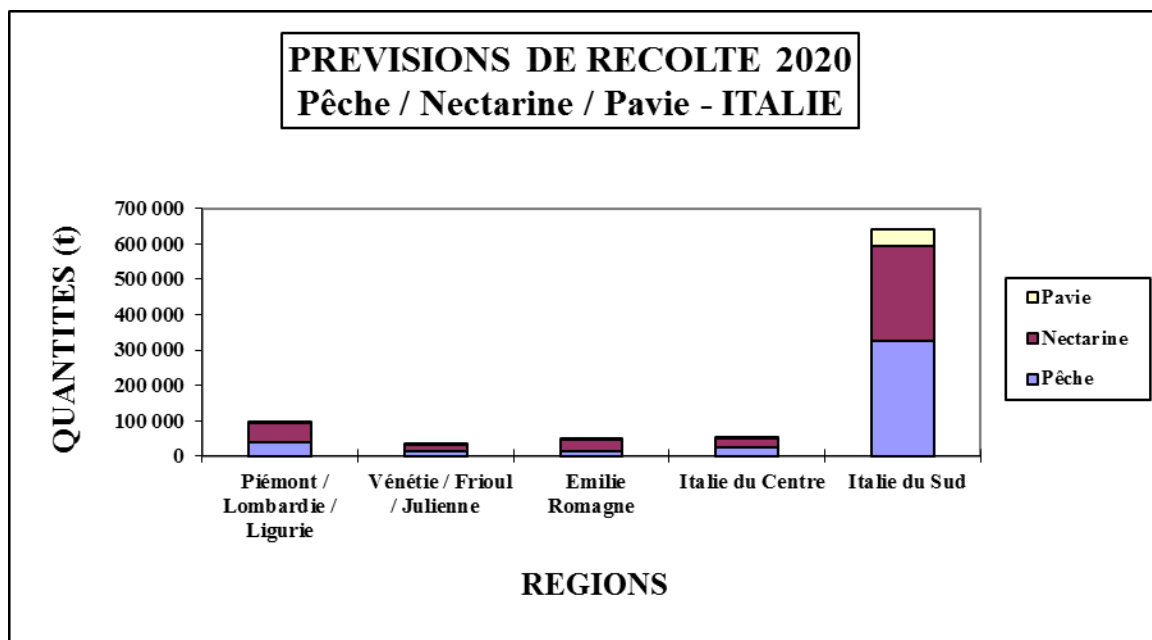
| | Fishing | Nectarine | Pavia | TOTAL <i>Peach + Nectarine</i> |
|--------------------------------------|----------------|----------------|---------------|-----------------------------------|
| Piedmont / Lombardy / Liguria | 39 196 | 54 709 | 883 | 93 905 |
| Veneto / Friuli / Julienne | 15 576 | 16 821 | 1 288 | 32 397 |
| Emilia Romagna | 14 506 | 31 404 | 3 563 | 45 910 |
| Central Italy | 25 625 | 26 328 | 1 232 | 51 953 |
| Southern Italy | 327 179 | 268 361 | 44 869 | 595 540 |
| TOTAL ITALY 2020 | 422 082 | 397 623 | 51 835 | 819 705 |

| | | | | |
|-------------------------------|---------|---------|--------|-----------|
| 2019 PRODUCTION | 534 212 | 608 653 | 92 389 | 1 142 865 |
| AVERAGE PROD 2014-2018 | 554 393 | 683 679 | 74 450 | 1 238 072 |

| | | | | |
|---|------------------|------------------|-----------------|------------------|
| VARIATION 2020/2019 | - 112 130 | - 211 030 | - 40 554 | - 323 160 |
| | - 21% | - 35% | - 44% | - 28% |
| VARIATION 2019 / Average 2014-2018 | - 132 311 | - 286 056 | - 22 615 | - 418 367 |
| | - 24% | - 42% | - 30% | - 34% |

ITALY

Peach / Nectarine / Pavia 2020 Forecasts



FRANCE

Peach / Nectarine / Pavia 2020 Forecasts

Unit: tons.

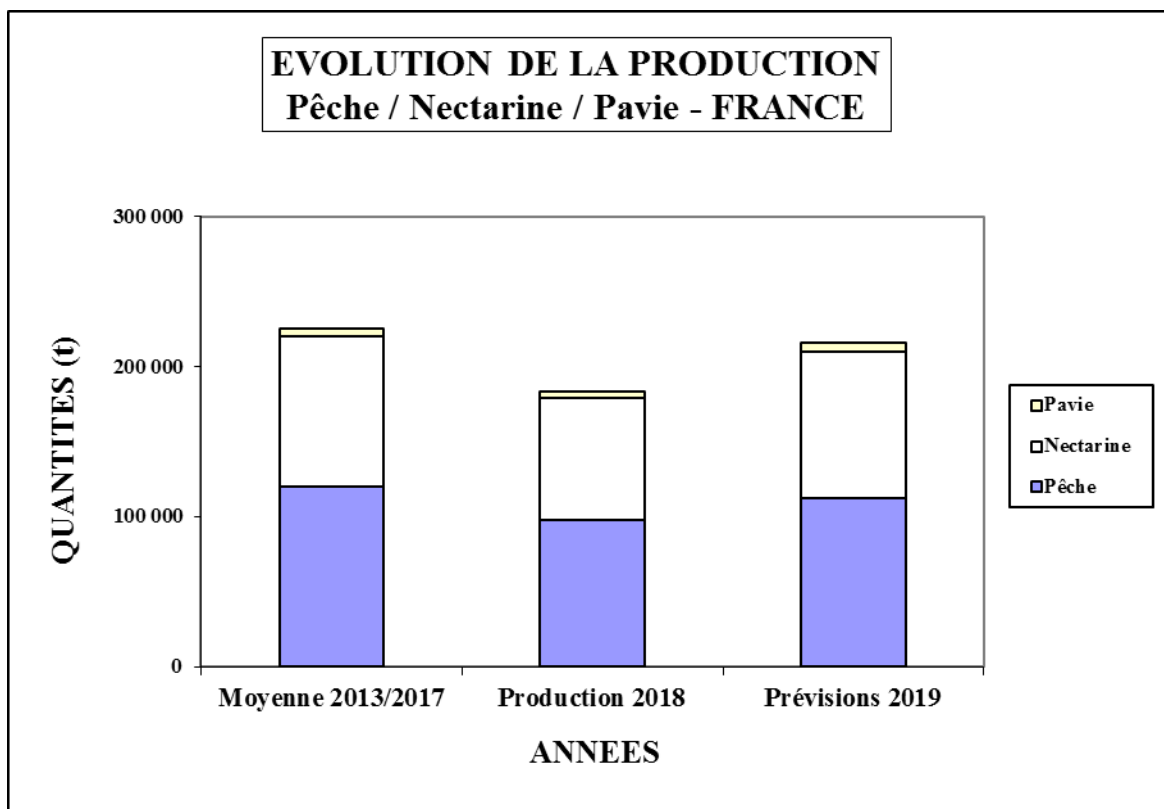
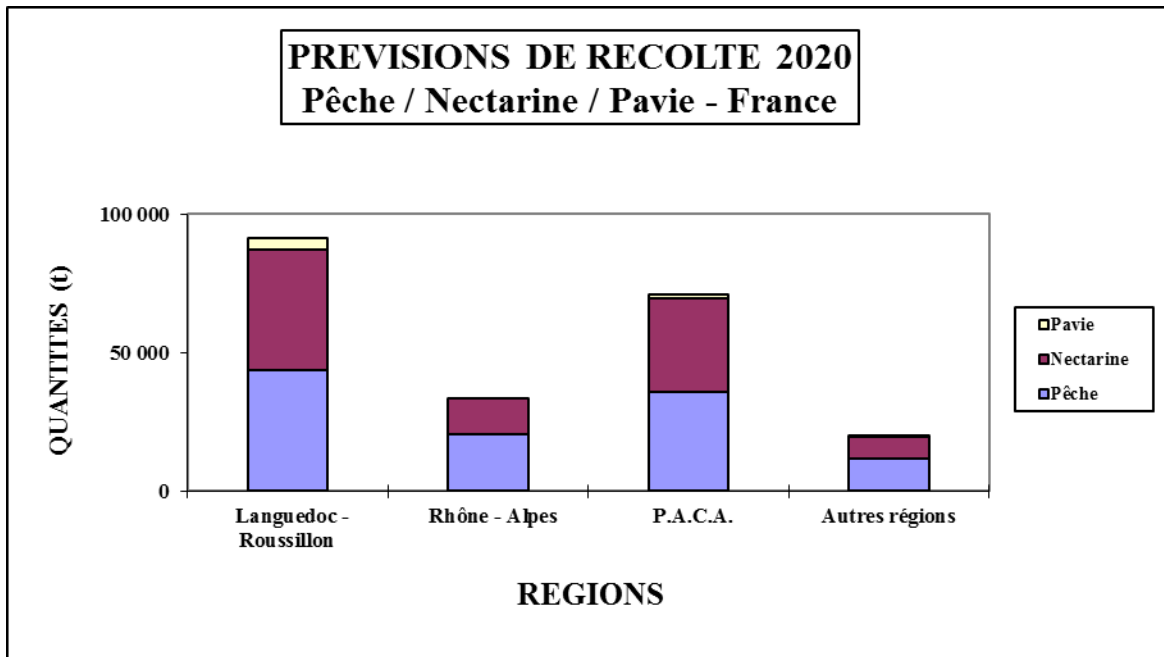
| | Peach | Nectarine | Pavia | TOTAL <i>Peach + Nectarine</i> |
|-------------------------------|---------------|------------------|--------------|--|
| Languedoc - Roussillon | 38 722 | 40 978 | 3 490 | 79 700 |
| Rhône - Alps | 16 074 | 10 152 | 0 | 26 226 |
| P.A.C.A. | 30 566 | 27 154 | 1 098 | 57 720 |
| Other regions | 11 401 | 7 886 | 69 | 19 287 |
| TOTAL FRANCE 2020 | 96 763 | 86 170 | 4 657 | 182 933 |

| | | | | |
|-------------------------------|---------|--------|-------|---------|
| 2019 PRODUCTION | 106 034 | 91 585 | 5 186 | 197 619 |
| AVERAGE PROD 2014-2018 | 110 809 | 91 585 | 5 426 | 202 394 |

| | | | | |
|---|-----------------|----------------|--------------|-----------------|
| VARIATION 2020/2019 | - 9 271 | - 5 415 | - 529 | - 14 686 |
| | - 9% | - 6% | - 10% | - 7% |
| VARIATION 2019 / Average 2014-2018 | - 14 046 | - 5 415 | - 769 | - 19 461 |
| | - 13% | - 6% | - 14% | - 10% |

FRANCE

Peach / Nectarine / Pavia 2020 Forecasts



PEACH - NECTARINE - PAVIA

The 2019 campaign did not experience any notable climatic problem before the beginning of the harvests, only a few hailstorms punctually affecting certain production basins in July and August.

With 3.8 million tonnes of peaches, nectarines and pavias, 2019 was slightly above the five-year average and above 2018, which was a slightly deficit year (+6%).

As in recent years, there has been a two-speed European market, a contrasted market

On the one hand a very competitive "open" market in which Spaniards, Italians and Greeks compete to win export market shares, through promotions, and on the other hand the exception of the French production and market which seems to be protected at least partially.

It is true that French production has fallen sharply and is having difficulty covering the needs of its national market, even in the middle of the season, but this decrease and the work carried out by the sector have created a sort of balance which allows French peach to benefit from levels of remuneration in line with its production costs, which are much higher than those of its neighbours and competitors.

While Spanish arboriculturists ended up on the streets this winter to demonstrate against the level of remuneration they received, the French sector is now in the midst of a third positive campaign. And even if in the short term we cannot expect a real growth in potential, we can observe a renewal rate of the French orchard that reaches 8% according to the French APO, while at the same time the Catalan APO Afrucat announces that 2000 Ha have been uprooted this winter in the region of Lleida.

Despite favourable weather conditions for consumption, the European market was difficult overall and particularly from mid-August with a very difficult end of season for all production basins.

The winter 2019/2020 was marked by mild and even warm temperatures in some regions, with temperatures sometimes exceeding 25° in December and February.

The peach species is less sensitive to this lack of winter cold than its cousin the apricot tree and even if some varieties presented a heterogeneous and overall very average load, the production potential seemed close to normal.

But in March, some production basins such as Aragon, Catalonia, the Rhone Valley and Northern Italy experienced frosts that impacted production potential.

Italy is the country most affected by these frosts. All regions have been affected, but especially Emilia Romagna, which expects 2020 production to be almost 80% lower than last year.

Combined with a reduction in production areas, mainly in the North, Italy expects peach and nectarine production in 2020 to fall below the one million tonne mark with nearly 820,000 tonnes, a historically low harvest not seen for more than 25 years.

The 2020 forecast for Italy represents a 28% drop in production in 2019 and a 34% drop in production compared to the 2014/2018 average.

The same is true for the pavia peach with just over 50,000 tonnes predicted, a 44% decrease from 2019 and 30% below average.

Greece has also suffered frost, particularly in the region of Macedonia, where the bulk of the Greek production is concentrated. With a peach and nectarine harvest forecast of just over 300,000 tonnes, this is 10% below 2019 production and 3% above the 2014/2018 average.

For pavia peach, which is the "speciality" of Greek production, the forecast is 8% below 2019 production and 13% above the five-year average.

In Spain, the frost in March in the Ebro basin and its tributaries and the rain in April in the south (Murcia, Andalusia) also affected the production.

With a forecast of 1 114 000 tonnes of peaches, flat peaches and nectarines, Spanish production is on the levels it had reached in 2018, which represents a decrease of 14% compared to 2019 and 11% compared to the 2014/2018 average.

In the flat peach segment, a specificity of Spain, a forecast of 282 000 tonnes, i.e. a drop of 13% compared with 2019.

For pavia peaches intended for the industry but also for the fresh market in Spain, a relative stability is observed with -1% compared to 2019 and + 3% compared to the average.

In France, the frost mainly affected the Rhone Valley, but the other production basins spared by the frost are not filling up. The lack of winter cold generated a load deficit on certain varieties and the heavy rains in March and April caused damage in particular to the epidermis of certain nectarines.

With a forecast of nearly 183,000 tonnes of peaches and nectarines, French production is expected to be 7% below 2019 production and 10% below the 2014/2018 average.

All these cumulative deficits obviously give a downward European forecast with 2.4 million peaches, flat peaches and nectarines, i.e. a drop of 19% compared to 2019 and 19% also compared to the five-year average.

For these subspecies intended exclusively for the fresh market, it is necessary to go back to 2003 and 1998 to observe such low levels of production.

It should be noted that the same situation is observed for apricots, with a deficit forecast not seen since 2003 and 1998.

For pavia peaches, the decline is more limited with a forecast of 773,000 tonnes, down 9% from 2019 and up 4% from the five-year average.

The accumulation of all subspecies gives a European forecast of just under 3.2 million tonnes compared with 3.8 million in 2019 and 3.7 million for the 2014/2018 average.

The peach and nectarine harvests have only started in southern Spain and much can still happen in terms of both production and consumption, but so far, given the expected volumes, everything suggests that the market this year should experience a more favourable balance in production and avoid the crises of recent years.

But a new parameter appeared with the Covid-19 health crisis.

This crisis is primarily a concern for production, which is working to remove border barriers to bring in the seasonal foreign workers who usually carry out the harvesting.

But it also raises concerns for the entire industry about consumption and consumer behaviour as the pandemic evolves and a second wave or another lockdown might come.

Overall, apart from a few problems of reorganization of trade flows at the beginning of the lockdown, and with a few exceptions (potatoes, 4th range salads...), the situation on the fruit and vegetable markets has been rather correct since the onset of this crisis and this sector is not among the most impacted by the crisis.

However, there will be major changes compared to past years, particularly in terms of summer holidays with borders that are now closed, distance limitations for certain journeys, etc., which will change the distribution of populations on a European scale this summer, with probably a less marked North-South transhumance than usual. The food sector in general will have to adapt to this new context.

Above all, however, let's hope that the most pessimistic predictions about the development of the pandemic are wrong and that the summer will bring an almost normal return to normal with a positive collateral effect on the summer fruit market.

EUROPECH'.

**Thanks all those who were involved in the writing of this 2020
harvest forecasts for peach - nectarine - pavia**

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