

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

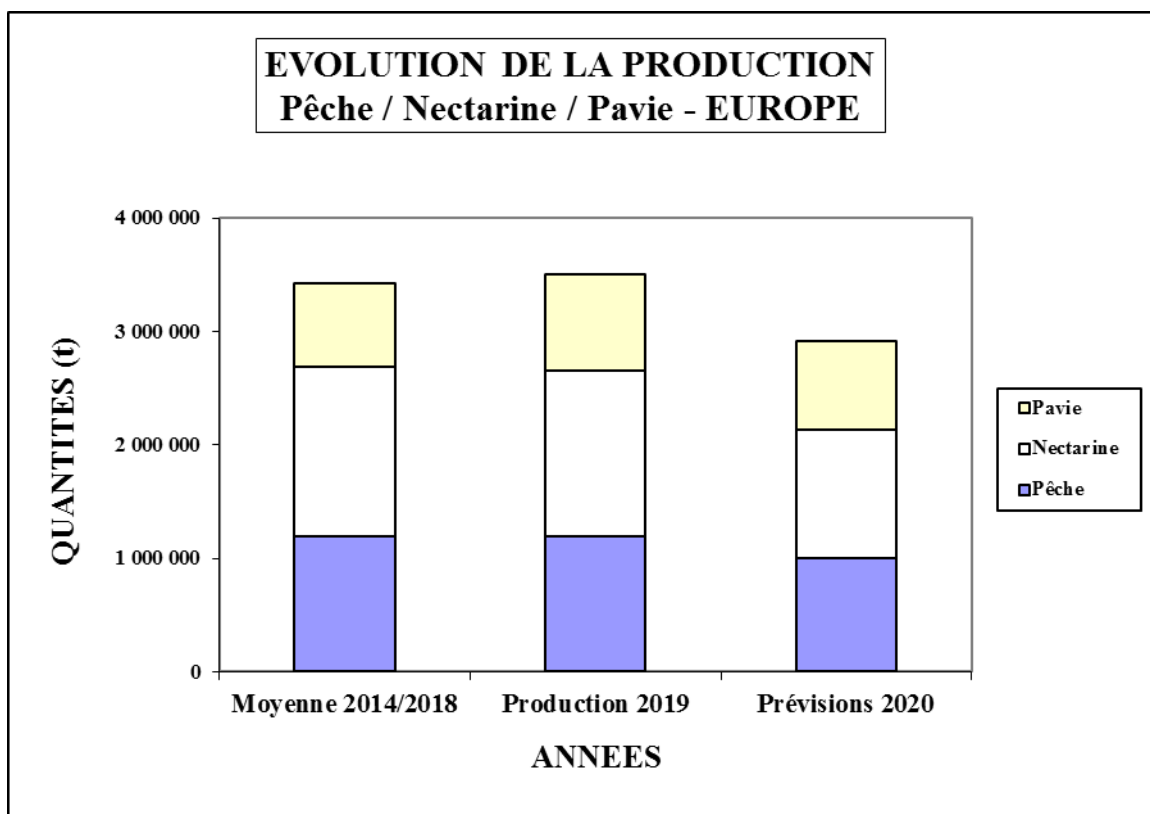
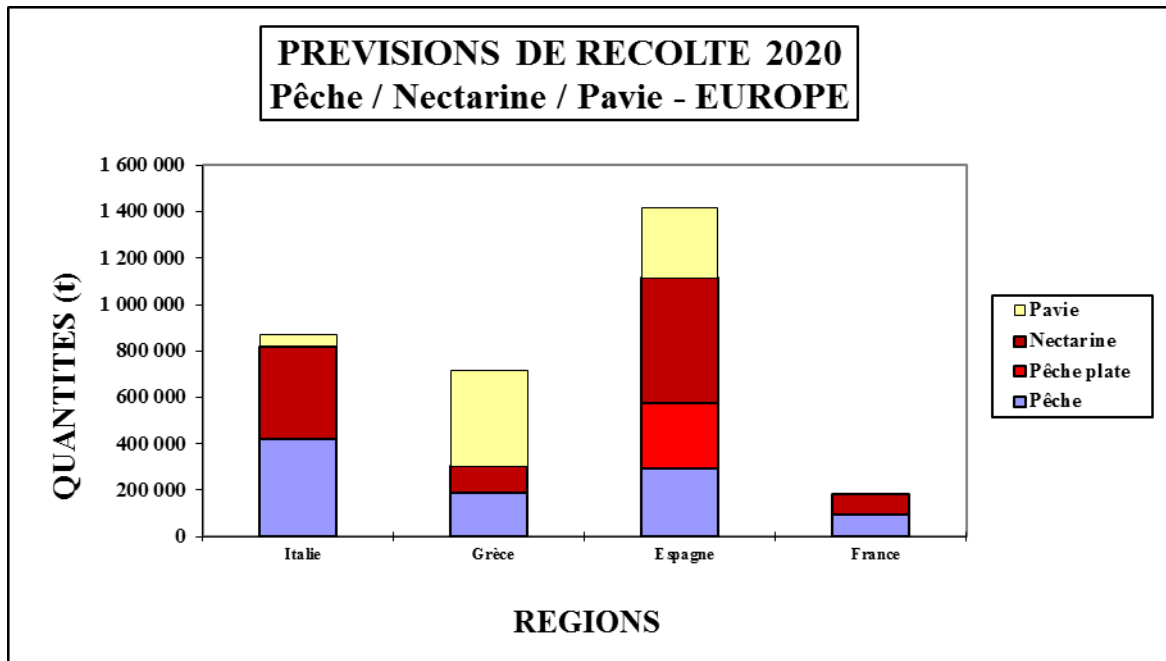
* To date, only Spain identifies flat peaches apart,
for the other countries, the volumes are very low and are integrated with the peach figures

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
	- 16%	- 13%	- 22%	- 9%	- 19%
VARIATION 2019 / Average 2014-2018	- 191 814	- 21 856	- 356 266	+ 32 691	- 569 936
	- 16%	- 7%	- 24%	+ 4%	- 19%

EUROPE

Peach / Nectarine / Pavia 2020 Forecasts



GREECE

Peach / Nectarine / Pavia 2020 Forecasts

Unit: tons.

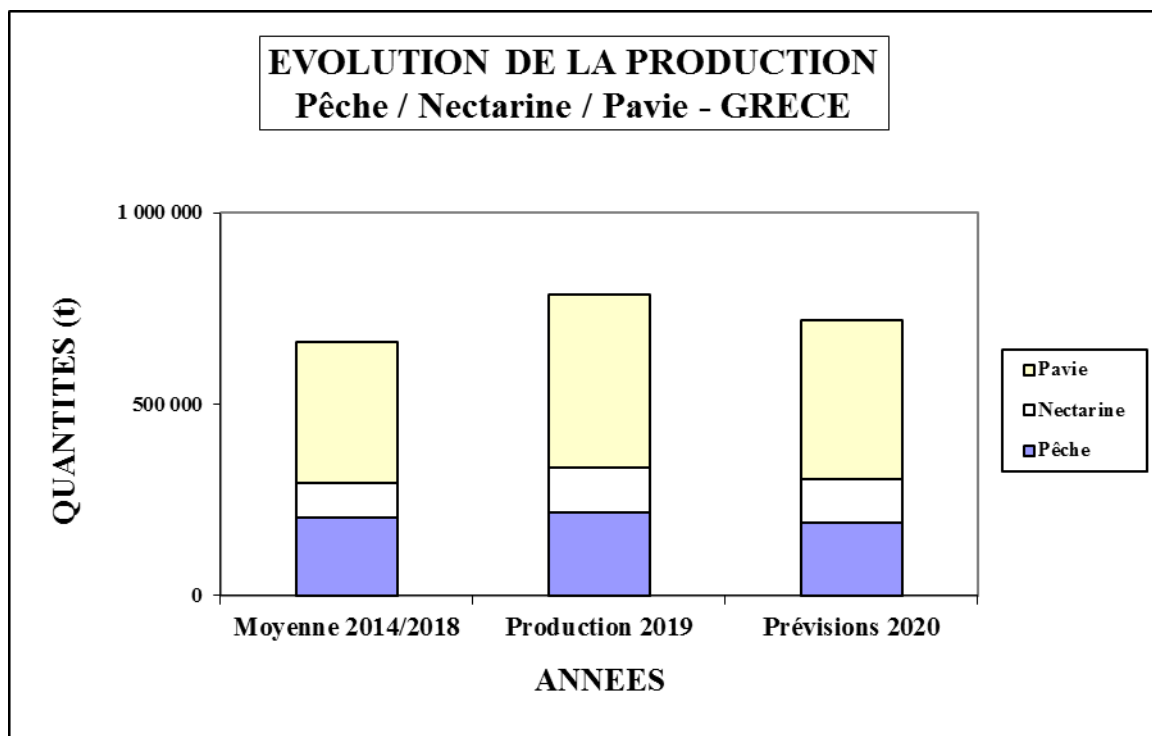
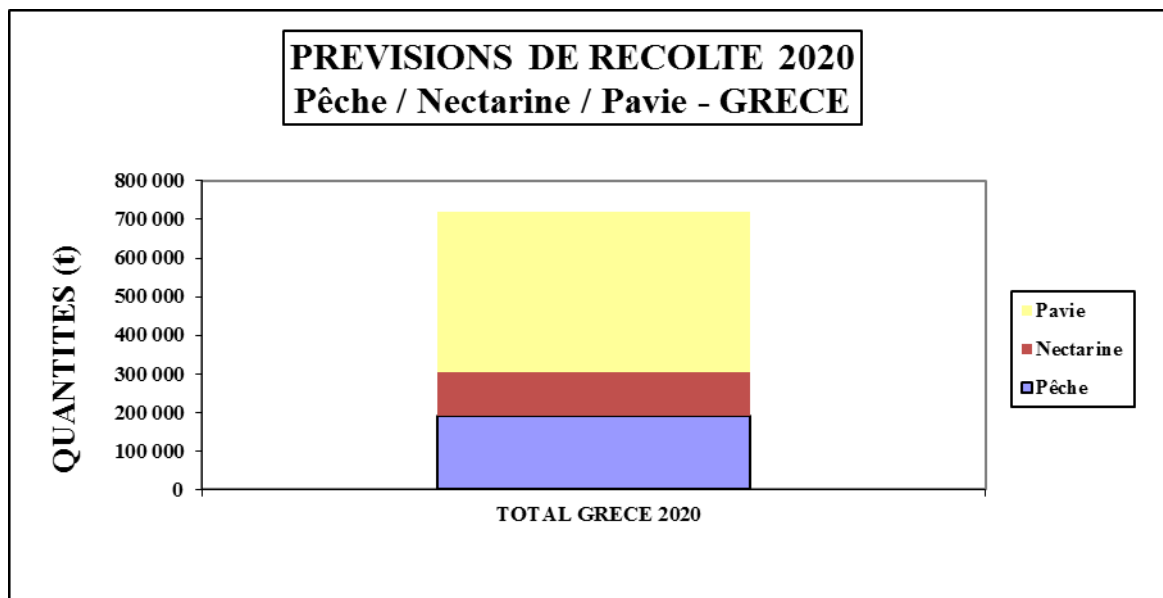
	Peach	Nectarine	Pavia	TOTAL <i>Peach + Nectarine</i>
TOTAL GREECE 2020	190 000	113 500	415 000	303 500

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.

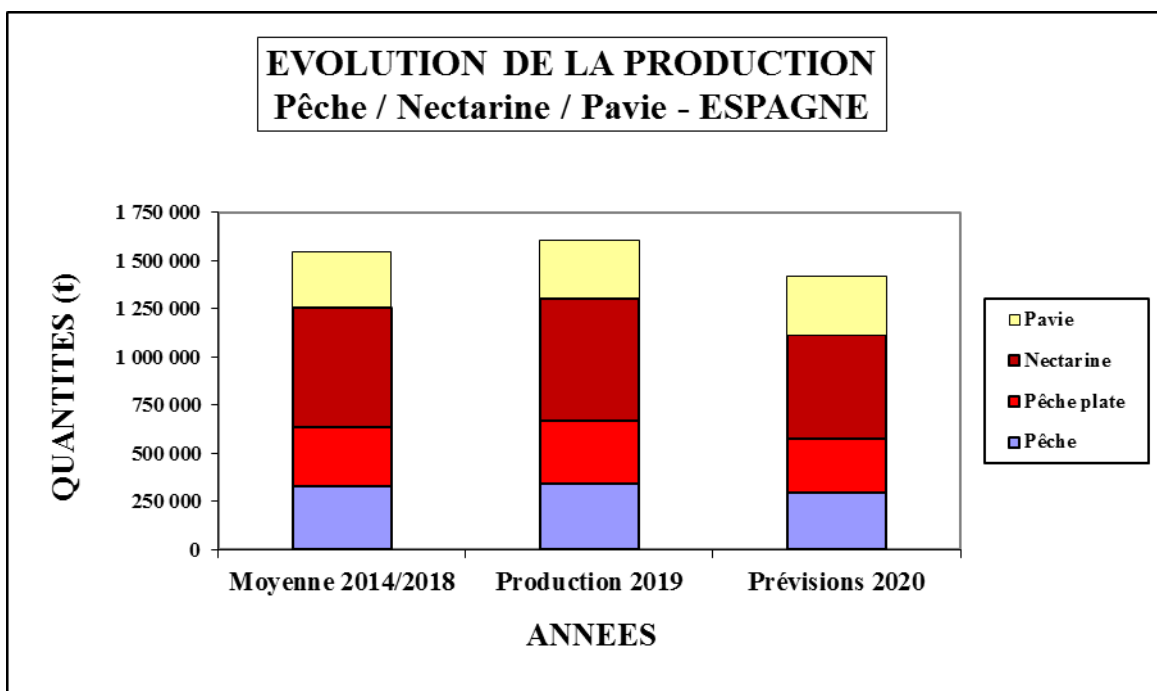
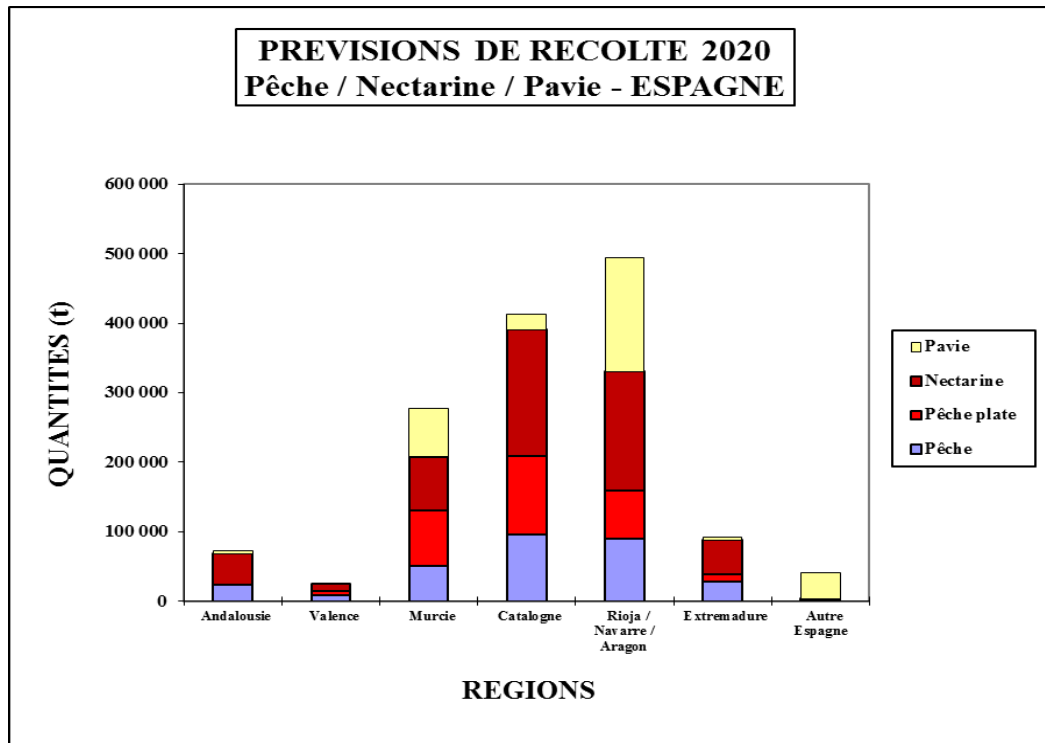
	Peach	Flat Peach	Nectarine	Pavia	TOTAL <i>Peach + Nectarine + pp</i>
Andalusia	23 563	159	44 919	3 227	68 641
Valencia	7 900	6 300	10 400	0	24 600
Murcia	50 000	80 000	78 000	70 000	208 000
Catalonia	95 490	113 630	181 500	22 430	390 620
Rioja / Navarra / Aragon	89 440	69 528	171 705	163 144	330 673
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	- 32 797	- 26 856	- 81 037	+ 8 565	- 140 690
/ Average 2014-2018	- 10%	- 9%	- 13%	+ 3%	- 11%

SPAIN

Peach / Nectarine / Pavia 2020 Forecasts



ITALY

Peach / Nectarine / Pavia 2020 Forecasts

Unit: tons.

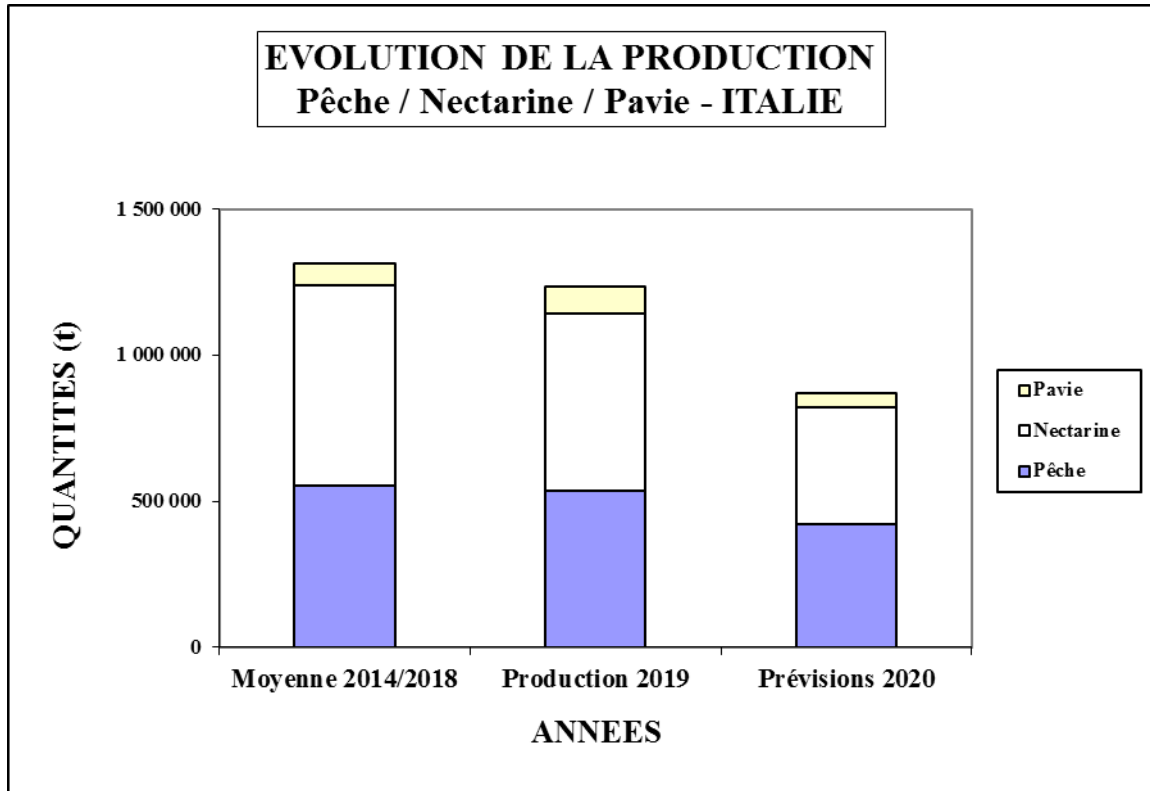
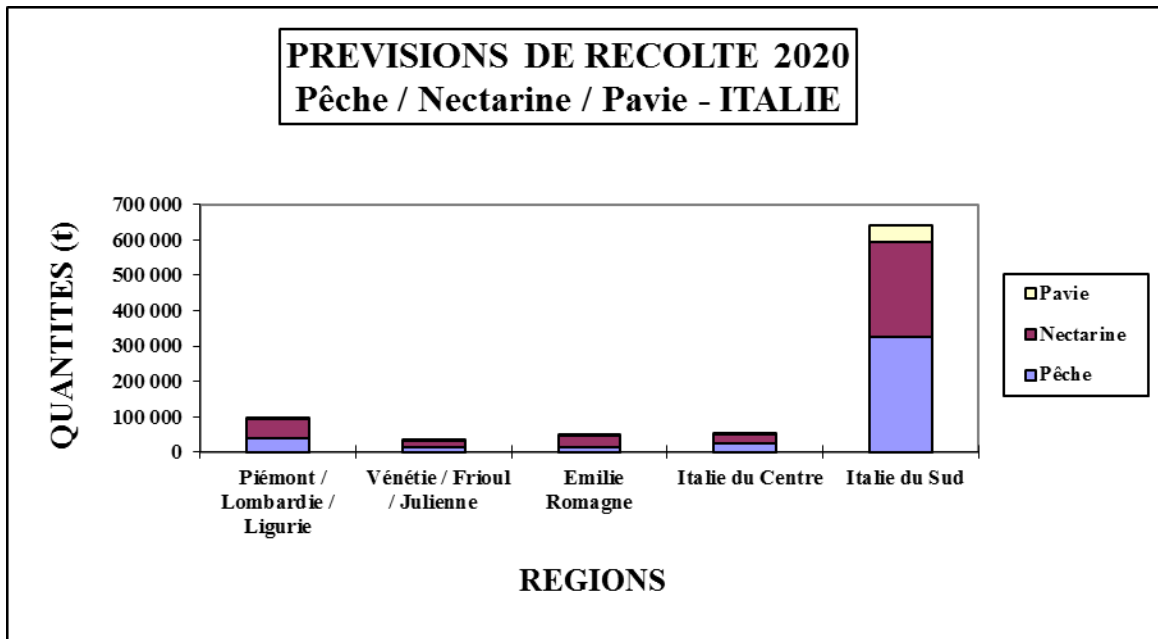
	Fishing	Nectarine	Pavia	TOTAL <i>Peach + Nectarine</i>
Piedmont / Lombardy / Liguria	39 196	54 709	883	93 905
Veneto / Friuli / Julienne	15 576	16 821	1 288	32 397
Emilia Romagna	14 506	31 404	3 563	45 910
Central Italy	25 625	26 328	1 232	51 953
Southern Italy	327 179	268 361	44 869	595 540
TOTAL ITALY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

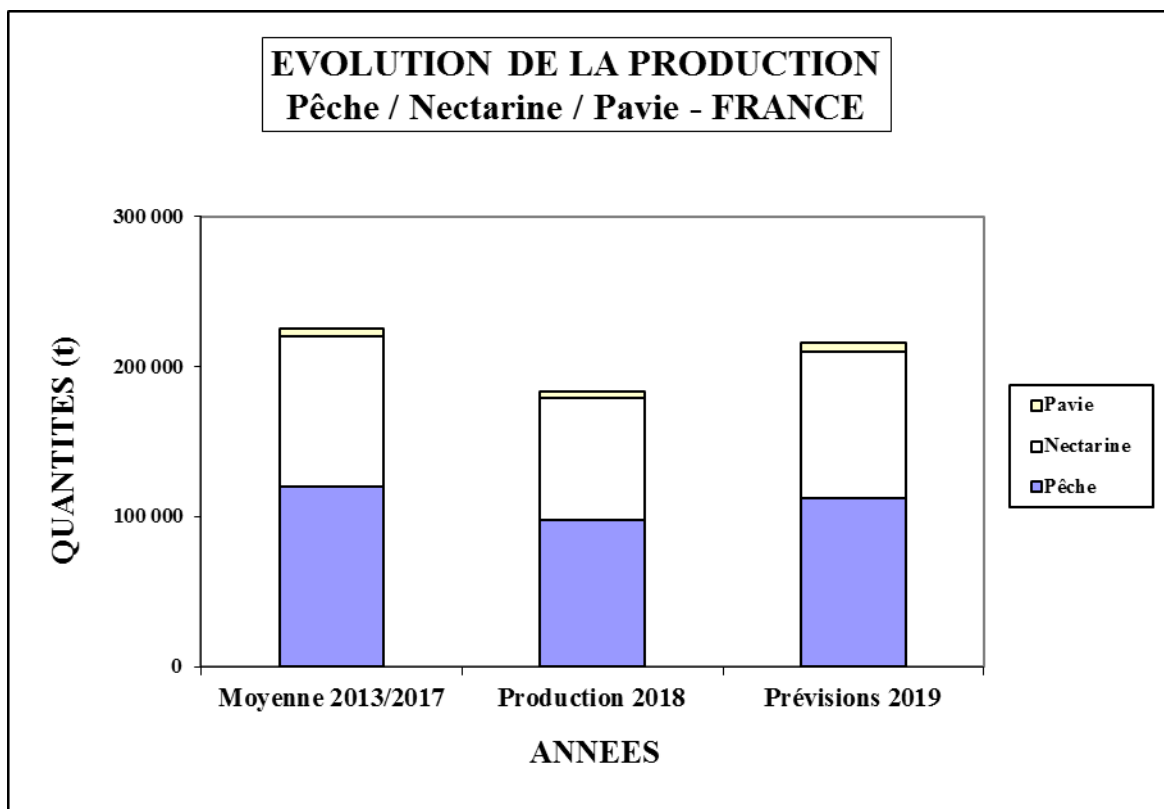
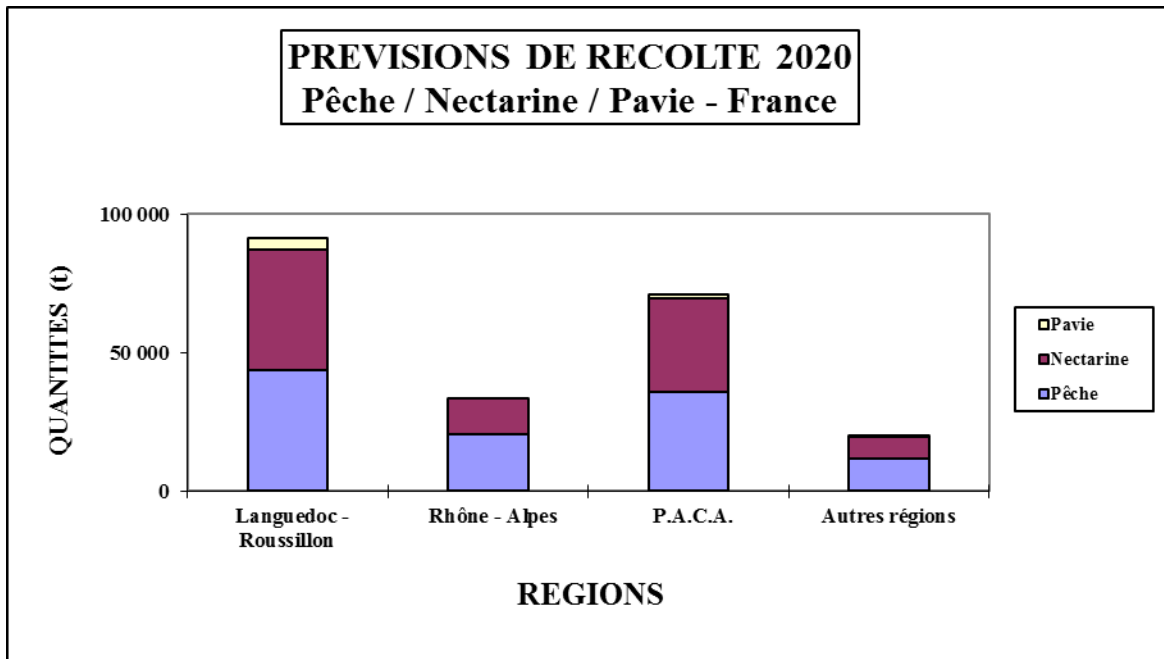
	Peach	Nectarine	Pavia	TOTAL <i>Peach + Nectarine</i>
Languedoc - Roussillon	38 722	40 978	3 490	79 700
Rhône - Alps	16 074	10 152	0	26 226
P.A.C.A.	30 566	27 154	1 098	57 720
Other regions	11 401	7 886	69	19 287
TOTAL FRANCE 2020	96 763	86 170	4 657	182 933

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	- 9 593	- 769	- 19 461
	- 13%	- 10%	- 14%	- 11%

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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