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# FIRST HARVEST ESTIMATES 2023/2024



**INTERPERA**

Congrés internacional de la pera · Congreso internacional de la pera · International pear congress

28-29 | Juny · Junio · June | 2023

La Llotja (Palau de Congressos) · Lleida (Spain)



## Contributors:

France: ANPP



Italy: CSO- Centro Servizi Ortofrutticoli



Netherlands: Fresh Produce Centre



Portugal: ANP



Belgium: VBT



Spain: Afrucat



FER - La Rioja



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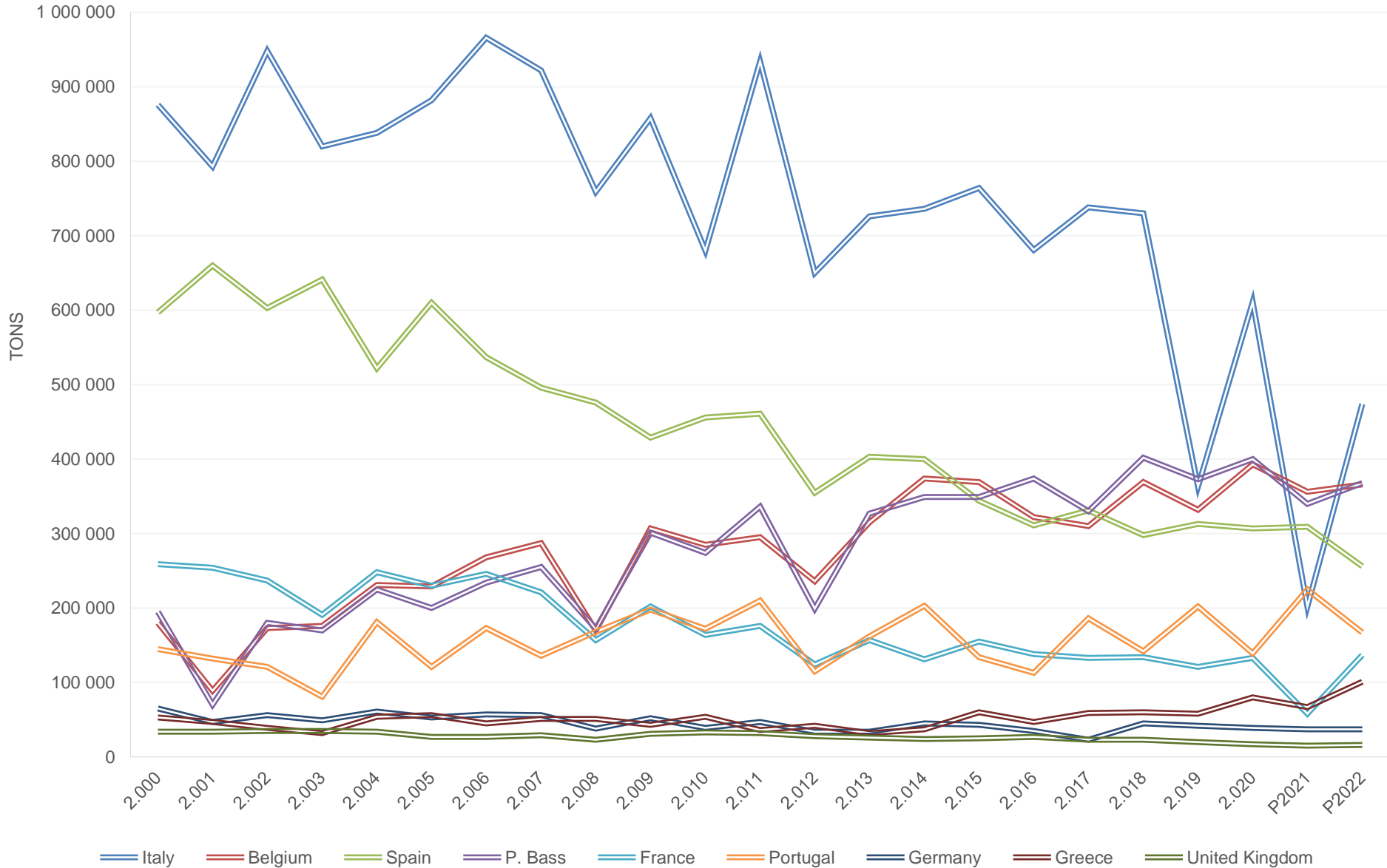


1. Evolution of EU production
2. First information on the European pear crop forecast 2023/2024

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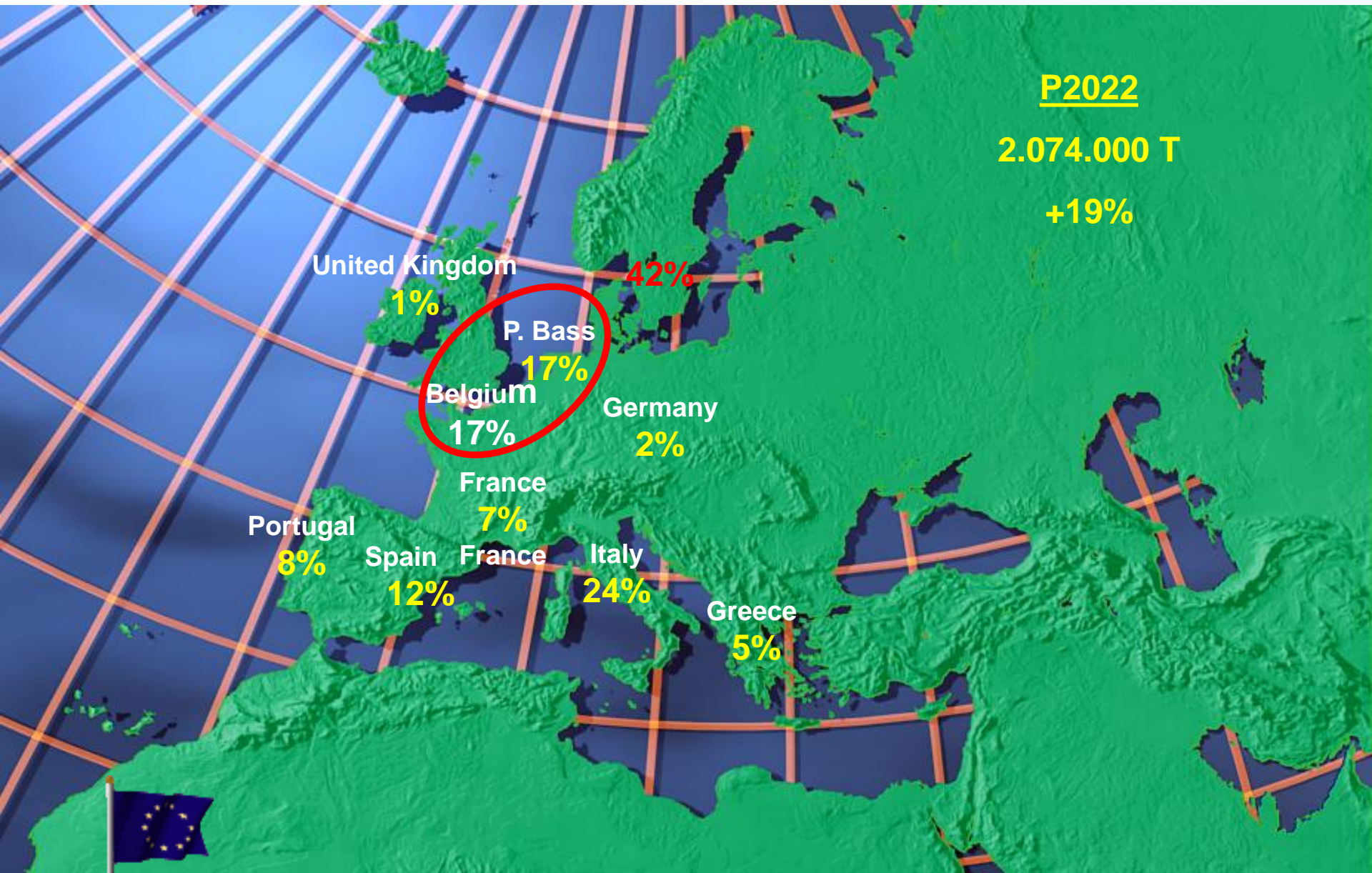
# Evolution of pear PRODUCTION of the main EU-27&UK countries

(Source: Prepared by Afrucat based on Prognosfruit-WAPA data, December 2022).



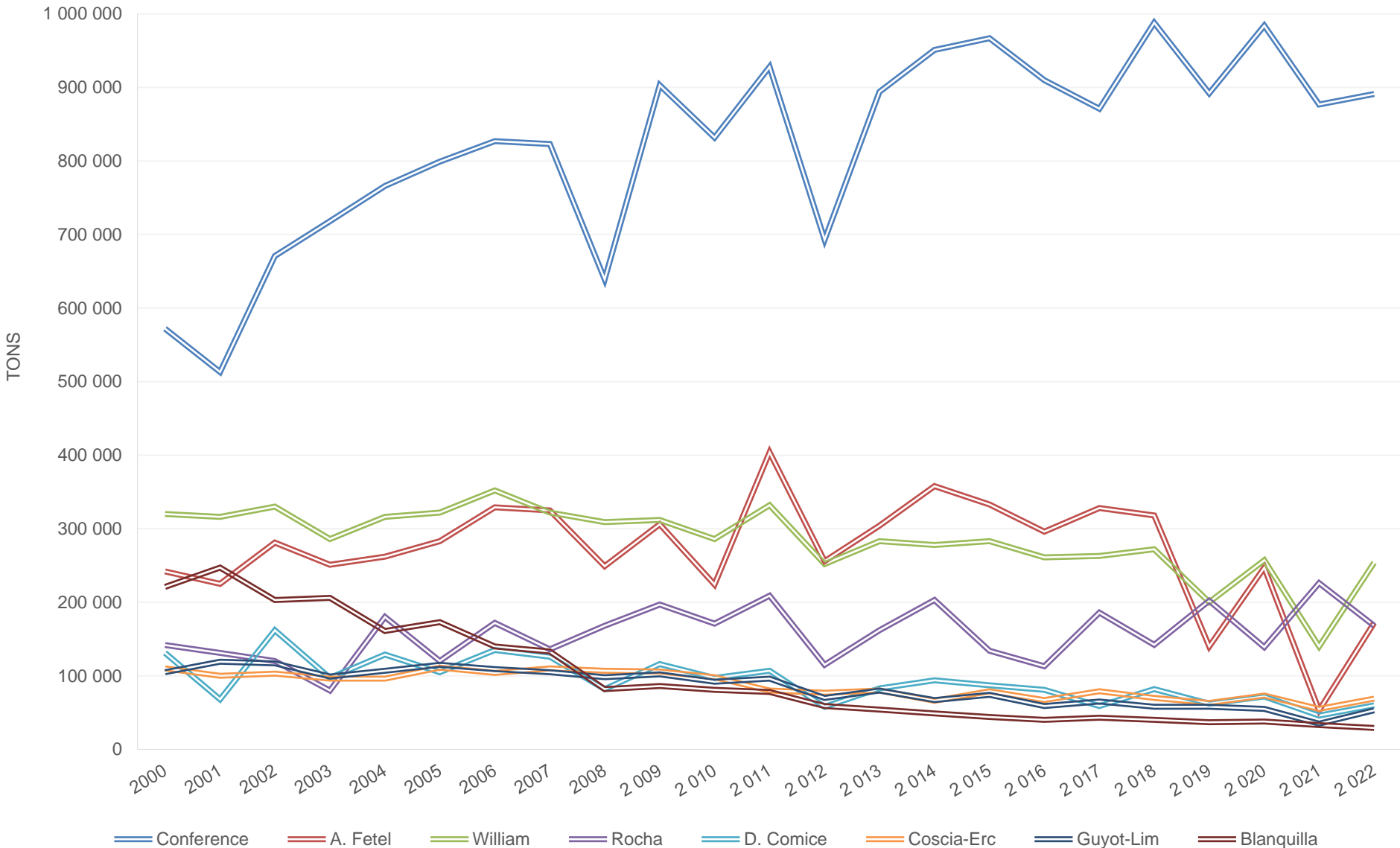
# EUROPE. Distribution % of pear production

(Source: Prepared by Afrucat based on Prognosfruit-WAPA data, December 2022).



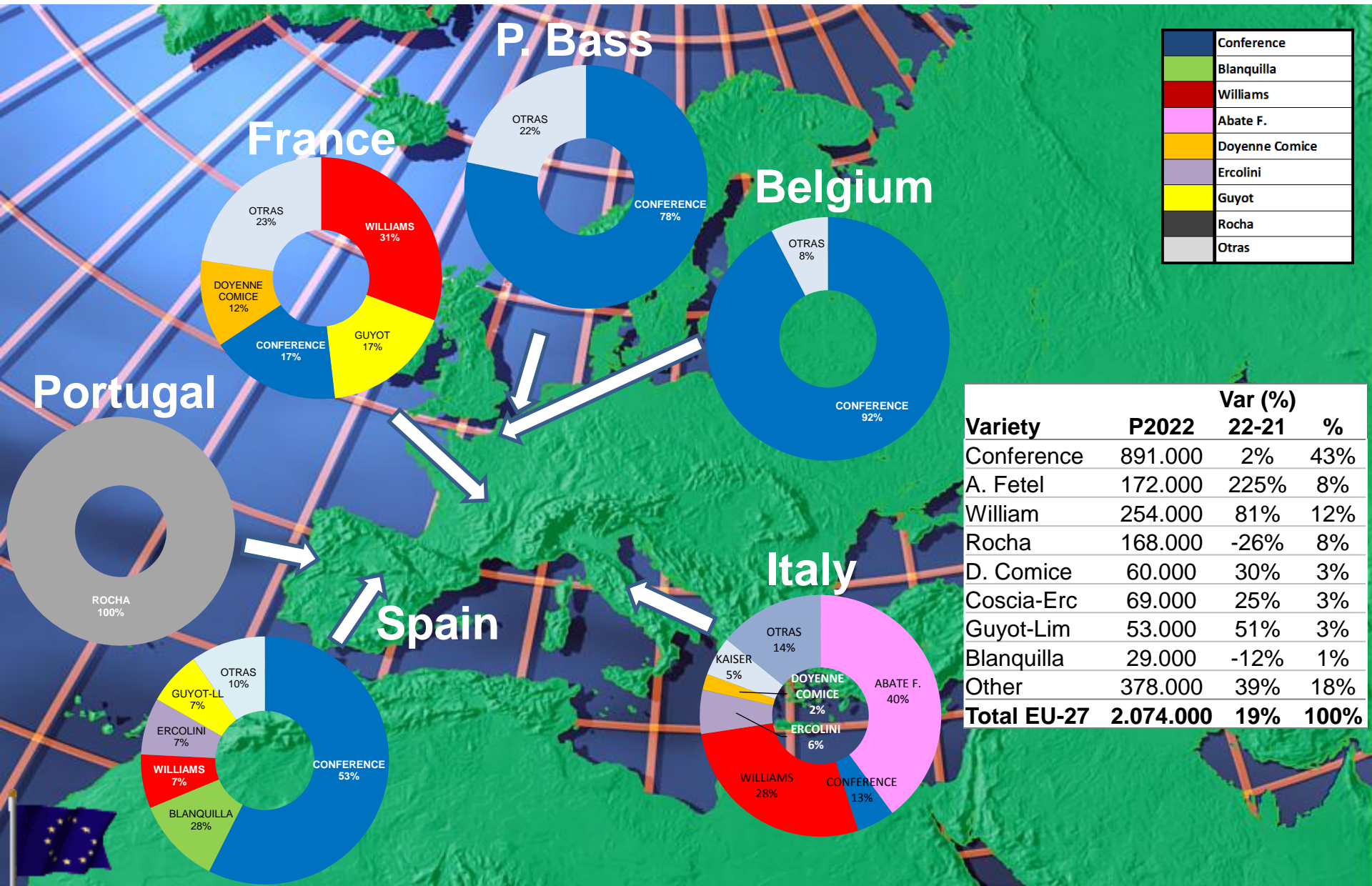
# Evolution of pear production EU-27&UK, by VARIETIES

(Source: Prepared by Afrucat based on Prognosfruit-WAPA data, December 2022).



# EUROPE. Varietal distribution by country

(Source: Prepared by Afrucat based on Prognosfruit-WAPA data, December 2022).



P. Bass

France

Belgium

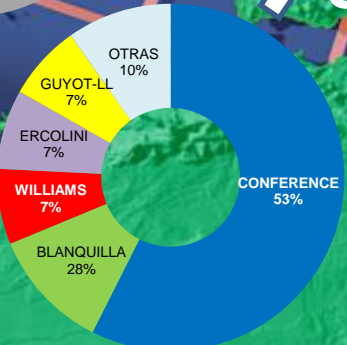
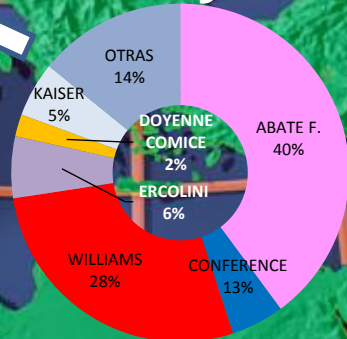
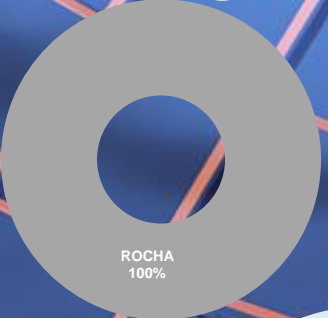
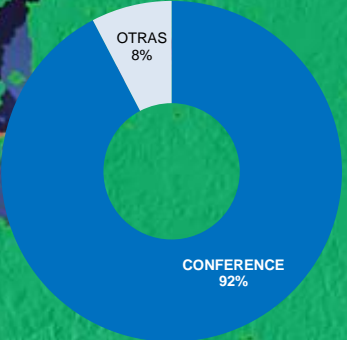
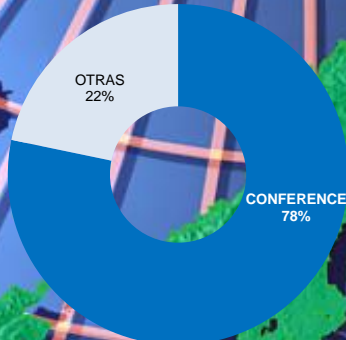
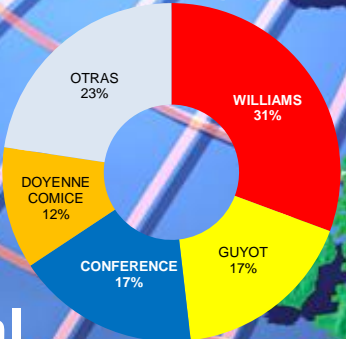
Portugal

Italy

Spain

Conference
Blanquilla
Williams
Abate F.
Doyenne Comice
Ercolini
Guyot
Rocha
Otras

Variety	P2022	22-21	Var (%)
Conference	891.000	2%	43%
A. Fétel	172.000	225%	8%
William	254.000	81%	12%
Rocha	168.000	-26%	8%
D. Comice	60.000	30%	3%
Coscia-Erc	69.000	25%	3%
Guyot-Lim	53.000	51%	3%
Blanquilla	29.000	-12%	1%
Other	378.000	39%	18%
<b>Total EU-27</b>	<b>2.074.000</b>	<b>19%</b>	<b>100%</b>







## NETHERLANDS 2022

(Source: Fresh Produce Centre)

**P2022**

**351.000T**

➤ **Volume:**

Total pear production in 2022 was 3% higher than in 2021. The final harvest was somewhat lower than the first forecast at the end of July due to smaller sizes in the southern part of the Netherlands (heat and drought). The rainy period in early September came too late for the Conference, as the harvest had already started.

➤ **Quality:**

Good organoleptic quality (taste, etc.) due to the large amount of sunshine during the growing season.

➤ **Calendar:**

The harvesting season started at the end of August; 1 week earlier compared to the average.

➤ **Market and prices 2022/2023:**

The season started with relatively (too) low prices for smaller pears. The price for larger pears was good. Due to the shortage of product in the EU, prices rose considerably in the second half of the season. High demand for Dutch pears in the EU. Stocks in the EU decreased considerably, since January stocks have been considerably lower than in previous years. Dutch growers who still had pears in stock received high prices in the last months of the season.



## **BELGIUM 2022**

(Source: VBT)

**P2022**

**346.000T**

### ➤ **Volume:**

Lower production than initially planned due to lower calibres.

### ➤ **Quality:**

Due to the dry summer, the pears were smaller than average. Overall, the quality was better than in 2021. Excessive sunshine has ensured that Brix<sup>o</sup> are well above 12°, making the pears very sweet this season.

### ➤ **Calendar:**

The 2022 harvest was noticeably earlier than in previous years. The first pears were harvested as early as mid-August.

**P2022**

**505.000T**



**ITALY 2022** (Source: CSO)

➤ **Volume:**

The quantities harvested were lower than expected, mainly due to the climatic evolution: the persistence of high summer temperatures and drought affected the normal growth of the fruit, another limiting factor represented by the presence of brown spot.

➤ **Quality:**

Below average calibres

➤ **Calendar:**

Earlier harvests compared to 2021, especially for early summer varieties, while autumn-winter varieties were almost in line or a few days ahead of previous years.

➤ **Market and prices 2022/2023:**

Given the strong presence of small sizes, it was difficult to promote this type of product. Product demand is not very active for large sizes, consumers are looking for cheaper products. We have tried to boost Abate prices and differentiate it from other varieties. In general, prices need to be kept at the right levels due to rising production costs, rising energy prices, etc. Domestic consumption is not high due to the economic situation and inflation. Belgium-Dutch Conference Competition in the different foreign markets for very cheap prices compared to the Italian product.



## **FRANCE 2022** (Source: ANPP)

**P2022**

**147.000T**

### ➤ **Volume:**

Production 10,000 t higher than the initial forecast. Good calibres. Harvest close to production potential.

### ➤ **Quality:**

Good quality and good calibres in general, practically free of epidermal defects.

### ➤ **Calendar:**

Advance of 1 week

### ➤ **Market and prices 2022/2023:**

**Prices between 21/22 (high) and 21/22 (normal). Balanced market.**



## **PORTUGAL: Campaign 2022** (Source: ANP)

**P2022**

**167.000 T**

### ➤ **Volume:**

Final production lower than the initial forecast (123,744 t), due to the high temperatures in July (compromised fruit growth), low water availability and the incidence of problems of physiopathies.

### ➤ **Quality:**

Good organoleptic quality, good sugar content. Small sizes, greater sensitivity of the epidermis to damage caused during harvesting; greater preservation challenges.

### ➤ **Calendar:**

Slightly later than in 2021 and a normal year.

### ➤ **Market and prices 2022/2023:**

Prices with positive evolution, but not enough to cover the increase in costs (taking into account the lower quantity and smaller sizes). It is expected that in 2023/2024 it will be possible to start from the prices of the end of the season, taking into account that the quantity produced will be similar.



## **SPAIN 2022** (Source: Afrucat)

**P2022**

**250.000T**

➤ **Volume:**

Production slightly lower than initially expected, frost damage was higher than expected.

➤ **Quality:**

Good quality overall. Calibres lower than expected. Good level of *Russeting* in Conference. High °Brix.

➤ **Harvest calendar:**

Initially, there was a delay of 7 days, but it became more than a normal year as the season progressed.

➤ **Market and Prices 2022/2023:**

With little product available, the situation has been generally stable, slow at some points in the season. Prices and demand have been favourable, especially for the larger sizes.

Some specific preservation problems due to high temperatures during the harvesting season.

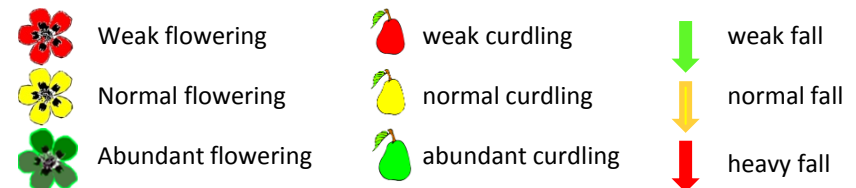
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# Coscia- Ercolini: Spain and Italy (Source: CSO and Afrucat)

**Spain : Normal-abundant flowering and fruit set, normal drop**

**Italy: Abundant flowering, weak fruit set and abundant fall.**

5.400t / +64%  
(CAT+Rioja)





# Guyot-Limonera: Italy, France and Spain (Source: CSO, ANPP and Afrucat)

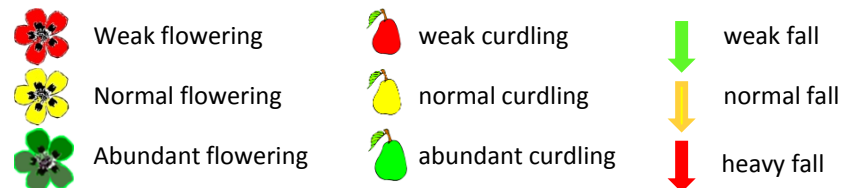
France: Normal flowering, weak fruit set and abundant fall.

Spain : Normal flowering and fall, normal-abundant fruit set.

Italy: Abundant flowering, weak fruit set and abundant fall.

15.000t / -52%

19.700t / +17%  
(CAT+Rioja)



# Conference: Spain, France, Italy, Belgium and the Netherlands

(Source: CSO, ANPP, Fresh Produce Centre, VBT and Afrucat).

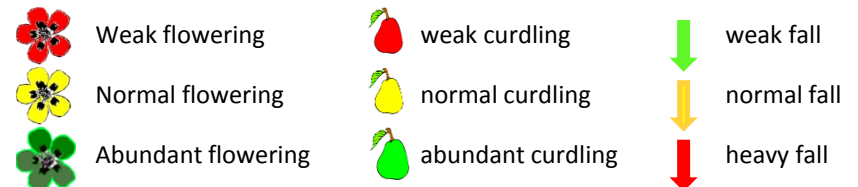
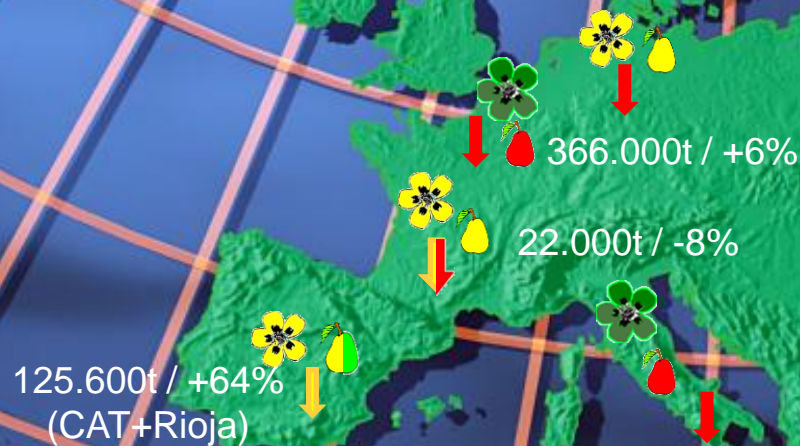
Italy: Abundant flowering, weak fruit set and abundant fall.

Spain: Normal flowering and fall, normal-abundant fruit set.

France: Normal flowering and fruit set and normal-abundant fall.

P. Low: Normal flowering and fruit set and abundant fall.

Belgium: Abundant blossom and fall, weak fruit set.

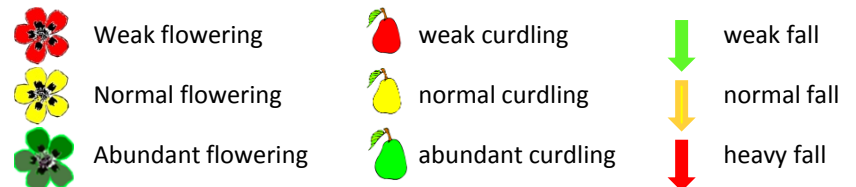


# Abate Fetel: Italy and Spain (Source: CSO and Afrucat)

Italy: Abundant flowering, weak fruit set and abundant fall.

Spain: Normal to abundant flowering, normal fruit set and fall.

+50%  
(CAT)



# Blanquilla: Spain (Source: Afrucat)

Spain: Flowering, normal fruit set and normal fall.

9.000t / +20%  
(CAT+Rioja)



Weak flowering



Normal flowering



Abundant flowering



weak curdling



normal curdling



abundant curdling



weak fall



normal fall



heavy fall

# Williams: Italy, France and Spain (Source: CSO, ANPP and Afrucat)

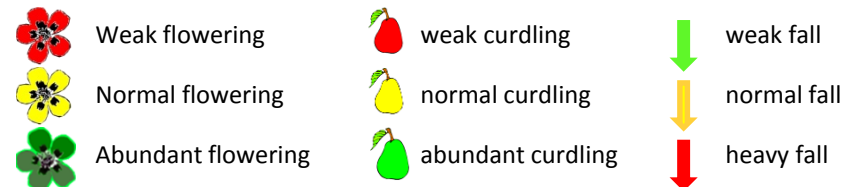
Italy: Abundant flowering, weak fruit set and abundant fall.

Spain : Normal-abundant flowering, fruit set and normal fall.

France: Normal flowering and fruit set, abundant fall.

31.000t / -31%

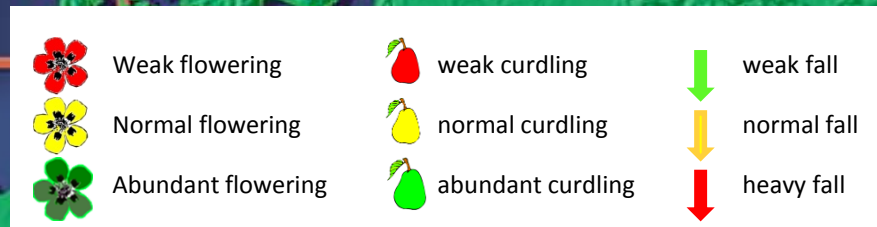
17.400t / +49%  
(CAT)



# Rocha: Portugal (Source: ANP)

Portugal : Normal blossom and fall, weak fruit set.

132.000t / +7%





## **Netherlands 2023**

(Source: Fresh Produce Centre)

### ➤ **Climatology:**

Very wet spring, no frost problems, dry period from mid-May.

### ➤ **Volume:**

It is too early to have figures. A normal harvesting period is estimated, starting at the beginning of September.



## **Belgium 2023**

(Source: VBT)

### ➤ **Climatology:**

Dry period in spring and summer in 2022. Heavy rain in spring 2023.

### ➤ **Volume:**

It is too early to make accurate forecasts, the variation could be very large. Stability in plantation area.

### ➤ **Quality:**

More russeting in the lower altitude plantations (Limburg, Vlaams-Brabant), less in East Flanders.





## Italy 2023 (Source: CSO)

### ➤ **Climatology:**

Optimum flowering for the different varieties with earlier periods than usual. Subsequently, we had poor fruit set due to the frosts at the beginning of April that affected the northern regions of Italy, in particular Emilia-Romagna. The floods in mid-May in Romagna caused further damage, which is still being assessed.

### ➤ **Volume:**

Too early to have figures, but lower quantities are expected compared to 2022 due to frost damage, poor fruit set and fruit drop, but also flood damage that has not yet been quantified.

### ➤ **Surface area:**

Continued decrease in areas, contributing to the reduction in production.



## France 2023 (Source: ANPP)

### ➤ **Climatology:**

Cool temperatures during flowering.

### ➤ **Volume:**

Decrease in production due to heavy fruit load in the previous year and climatic conditions during flowering. Important physiological drops.

### ➤ **Surface area:**

4% increase

### ➤ **Quality:**

Good quality, good sizes expected. Delay 2-7 days, depending on the production area.



## **Portugal 2023**

(Source: ANP et Frutus)

### ➤ **Climatology:**

Adverse weather conditions during flowering and fruit set with high temperatures compromised good fruit set.

### ➤ **Volume:**

Production higher than last year but below potential. Higher water availability, lower number of fruits and larger sizes.

### ➤ **Quality:**

Higher calibres due to less fruit per tree, higher russetting than in 2022.



## **Spain 2023** (Source: Afrucat)

### ➤ **Climatology during flowering and fruit set:**

Good weather conditions in general, no frost or hail (only in some areas).

### ➤ **Volume:**

A good harvest is expected initially, but everything will depend on the evolution of the drought, which will be decisive in the production obtained.

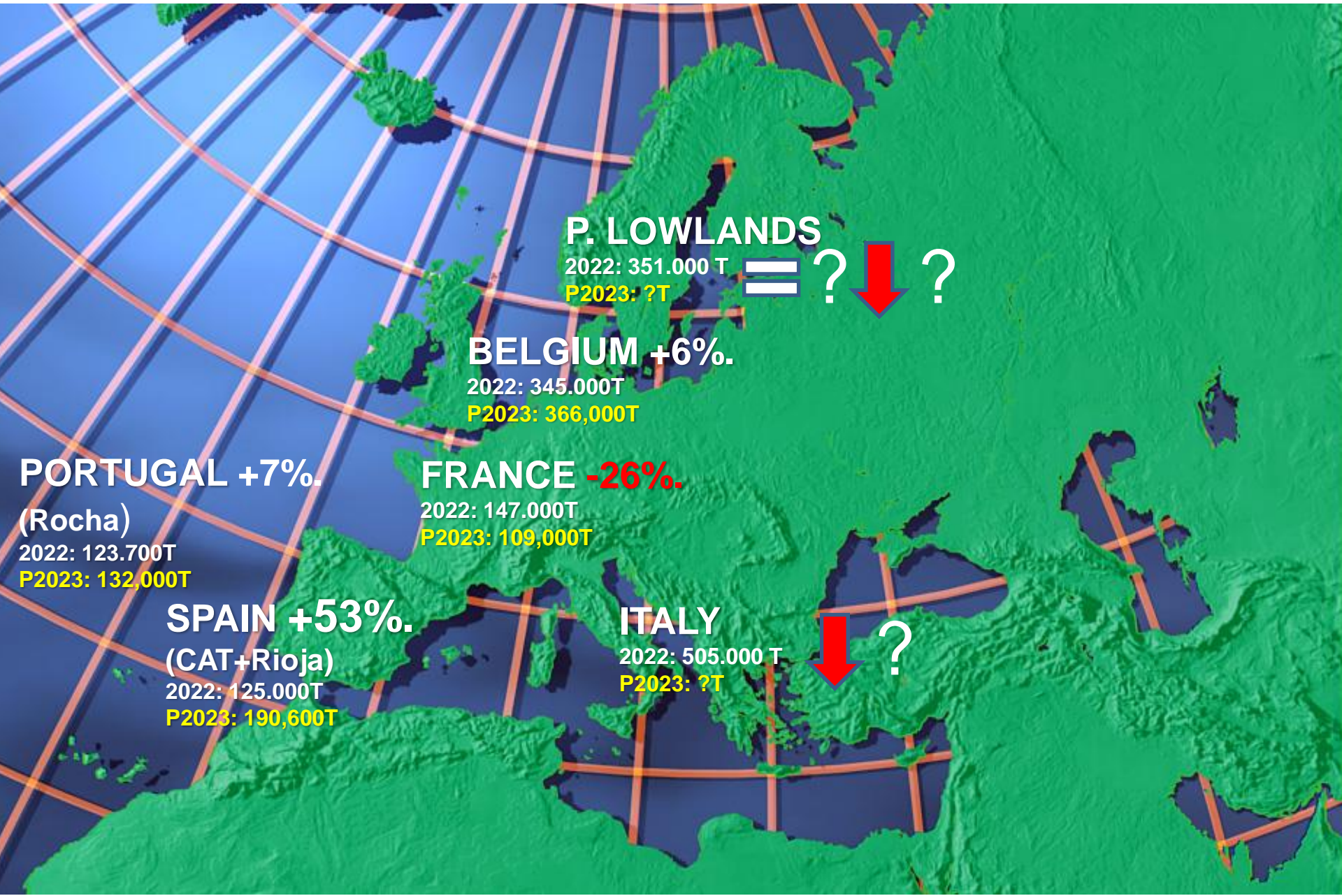
### ➤ **Quality:**

Good quality in general. Size will depend in part on the availability of irrigation.

### ➤ **Calendar:**

Initially there was a delay of about 7-10 days, but at the moment it is about a normal year, even in some areas there is an advance, due to the high temperatures in spring.

# FIRST ESTIMATE PEAR HARVEST 2023



**P. LOWLANDS**

2022: 351.000 T  
P2023: ? T

= ? ↓ ?

**BELGIUM +6%.**

2022: 345.000 T  
P2023: 366,000 T

**FRANCE -26%.**

2022: 147.000 T  
P2023: 109,000 T

**ITALY**

2022: 505.000 T  
P2023: ? T

↓ ?

**SPAIN +53%.**

(CAT+Rioja)  
2022: 125.000 T  
P2023: 190,600 T

**PORTUGAL +7%.**

(Rocha)  
2022: 123.700 T  
P2023: 132,000 T



Thank you  
Merci  
Grazie  
Obrigado  
Thank you  
Thank you

**Analysis by AFRUCAT**

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