

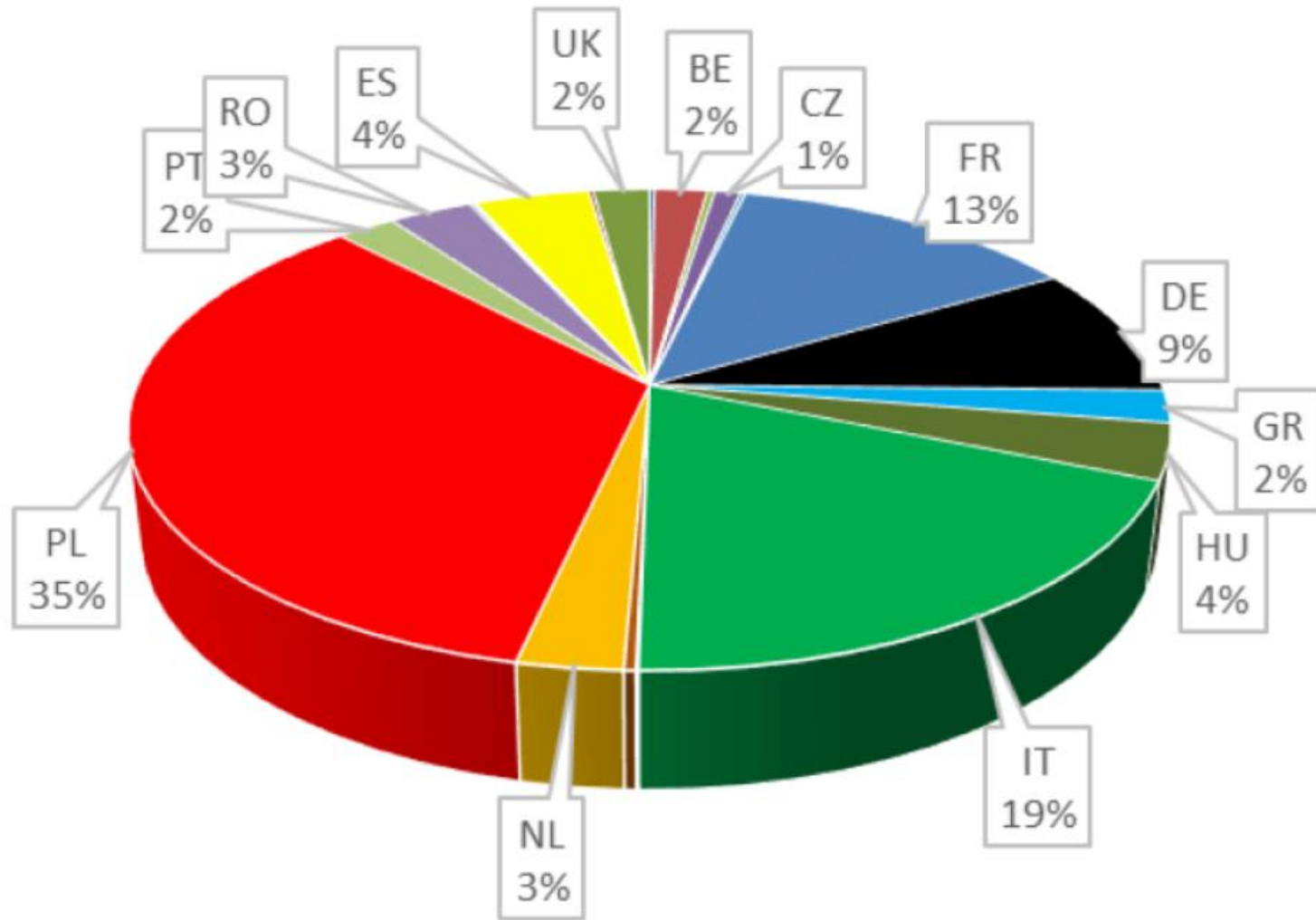
An aerial photograph of a rolling landscape. The foreground shows a large green field, possibly a vineyard or orchard, with rows of trees. The middle ground features rolling hills with a mix of green and autumn-colored trees. In the background, more hills are visible under a clear blue sky. A small cluster of buildings is situated on a hillside in the middle ground.

Apples market situation in Europe
New season forecast
Key trends

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Keckemt 10 August 2017

Production per country 2016 (Prognosfruit 2016)



Forecast per variety 2016 (Prognosfruit 2016)

x 1000 tons






Variety	2007	2008	2009	2010	2011	2012	2013	2014	2015	F2016	(1)	(2)
Annurca	51	45	35	34	35	35	35	40	35	35	0	-5
Boskoop	100	100	82	60	73	58	58	85	92	71	-23	-9
Braeburn	318	295	338	289	324	264	302	321	312	322	3	3
Bramley	85	85	85	85	85	85	85	83	84	85	1	8
Cortland	75	100	100	100	100	100	100	5	25	26		
Cox Orange	108	108	108	108	108	108	108	2	32	29	-17	-21
Cripps Pink	73	73	73	73	73	73	73	7	249	260	7	15
Elstar	489	489	489	489	489	489	489	6	431	394	-1	1
Fuji	188	200	200	200	200	200	200	1	321	309	-9	-4
Gala	1,024	1,024	1,024	1,024	1,024	1,024	1,024	4	1,328	1,329	-4	2
Gloster	94	94	94	94	94	94	94	6	201	193	6	0
Golden Delicious	2,530	2,530	2,530	2,530	2,530	2,530	2,530	5	2,677	2,364	-7	-8
Granny Smith	306	313	343	342	413	302	361	383	405	390	-4	2
Idared	388	895	828	619	692	986	1,069	1,192	1,129	1,064	-6	-6
Jonagold	660	812	742	544	652	475	500	644	633	565	-11	-5
Jonagored	234	190	190	190	190	190	190	1	491	535	3	19
Jonathan	148	350	350	350	350	350	350	8	193	123	-14	-28
Lobo	100	200	200	200	200	200	200	0	30	31		
Morgendurf/impera	88	88	88	88	88	88	88	7	74	66	44	12
Pinova	20	30	30	30	30	30	30	2	79	90	-10	12
Red Delicious	629	760	760	760	760	760	760	7	675	633	-2	-1
Red Jonaprince		300	300	300	300	300	300	3	98	159	52	87
ReINETTE Grise du	103	80	80	80	80	80	80	1	126	120	-10	-5
Shampion	172	395	323	257	327	423	457	494	513	520	1	6
Spartan	12	11	8	6	6	6	6	6	6	4	-34	-31
Stayman	19	18	16	18	17	12	18	14	14	14	-1	-9
Other new varieties	17	65	108	134	152	350	412	459	465	530	14	19
Other	1,173	1,804	1,652	1,495	1,541	1,377	1,358	1,809	1,776	1,801	1	9
Total:	9,206	11,395	11,008	9,740	10,746	10,095	10,929	12,560	12,325	12,004	-3	1

- Red Jonaprince : + 55.000T
- Morgendurf : + 20.000T
- Cripps Pink : +16.000 T
- Jonagored : + 16.000 T
- Braeburn: + 10.000 T
- Gloster: + 10.000 T

- Golden : -170.000 T
- Jonagold :-68.000 T
- Gala :-53.000 T
- Idared : -45.000 T
- Lobo : - 31.000 T
- Fuji : - 29.000 T

Non EU 2016 HARVEST FORECAST

x 1000 tons

<i>Country</i>	<i>2007</i>	<i>2008</i>	<i>2009</i>	<i>2010</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>F2016</i>	<i>(1)</i>	<i>(2)</i>
Belarus	300	240	250	150	180	171	145	160	155	155	0	1
Bosnia-Herzegovin	61	52	72	72	75	50	85	61	69	28	-59	-61
Canada	423	322	404	383	398	276	410	410	283	351	24	-5
China 	27,860	29,847	31,681	33,263	35,985	38,500	39,683	40,923	43,112	43,000	0	4
Macedonia	152	175	106	122	128	127	113	85	70			
Mexico	505	512	561	585	631	375	522	350	717	600	-16	13
Moldova	218	255	210	208	269	282	260	420	250	300	20	-3
Norway	9	13	10	9	5	6	7	8	5	8	55	24
Russia 	2,333	1,467	1,775	1,233	1,036	1,258	1,470	1,647	1,707	1,736	2	8
Serbia	245	236	282	240	266	179	332	317	356	400	12	19
Switzerland	155	136	167	127	155	141	132	143	140	134	-5	-3
Turkey 	2,400	2,457	2,518	2,402	2,432	2,445	2,681	2,109	2,466	2,851	16	18
Ukraine 	1,172	1,079	854	950	954	1,127	1,211	1,082	1,196	1,209	1	4
USA 	4,123	4,371	4,402	4,210	4,273	4,110	4,635	5,131	4,473	5,017	12	6

EU apple stocks dated 01.05.					
	2014	2015	2016	2017	% vs. '16
EU-28	1.246.000	1.252.000	1.347.000	1.332.000	-1%
<i>by countries</i>					
Belgium	34.000	46.000	42.000	32.000	-24%
Germany	92.000	114.000	112.000	127.000	13%
France	230.000	168.000	189.000	198.000	5%
Italy	412.000	456.000	467.000	474.000	1%
Netherlands	77.000	89.000	79.000	86.000	9%
Austria	55.000	51.000	54.000	11.000	-80%
Poland	275.000	250.000	325.000	300.000	-8%
Spain	63.000	72.000	62.000	95.000	53%
Czech Republic	8.000	7.000	15.000	7.000	-53%
<i>by varieties</i>					
Braeburn	39.000	25.000	27.000	29.000	7%
Elstar	24.000	40.000	26.000	27.000	4%
Fuji	54.000	35.000	52.000	38.000	-27%
Golden	502.000	544.000	533.000	565.000	6%
Granny	50.000	47.000	64.000	44.000	-31%
Idared	104.000	82.000	139.000	114.000	-18%
Jonagold	119.000	123.000	120.000	109.000	-9%
Jonagored	34.000	47.000	44.000	43.000	-2%
Red Delicious	43.000	38.000	47.000	52.000	11%
Red Prince	10.000	16.000	23.000	37.000	61%
Source: WAPA/ AMI					

EU pear stocks dated 01.05.

	2014	2015	2016	2017	% vs. '16
EU-28	107.000	101.000	126.000	114.000	-10%
<i>by countries</i>					
Belgium	12.000	19.000	21.000	25.000	19%
Italy	26.000	8.000	22.000	7.000	-68%
Netherlands	45.000	54.000	63.000	70.000	11%
Spain	22.000	19.000	19.000	12.000	-37%
<i>by varieties</i>					
Abate	2.000	1.000	5.000	4.000	-20%
Conference	96.000	97.000	119.000	109.000	-8%
Source: WAPA/ AMI					

SPRING FROST RESULTS ON 2017 HARVEST



COUNTRIES REVIEW

- FRANCE
 - > Level of damages depends from farm location (from 5% to even 20%)
 - > Total estimation 1 515 000 tons (1 674 000 in 2016) – 8%
- ITALY
 - > Loss between 20 to 25% is expected 1 757 000 MT (2 272 000 in 2016)
 - > Big different between varieties e.g. South Tirol lost a lot in Golden crope while Gala harvest will be on normal level
 - > E.g. Melinda group will be able to sell under their brand only 35% apples vs supply from 2016 season!!!
- SPAIN
 - > Very low losse compare to rest of Europe estimated on level of 4%
 - > 474 000 vs 495 000 in 2016

COUNTRIES REVIEW

- BELGIUM
 - > Level of damages is very high for apples only 74 000MT vs 234 000 in 2016
 - > For pears it less but -20% is significant reduction
 - > Dramatic situation of local growers especially those focused on apples
- HOLLAND
 - > Apples harvest is estimated on 234 000 MT vs 317 000 in 2016
 - > For pears it is -18%
- Germany
 - > Total huge loss estimated on 555 000MT vs 1000 033MT in 2016 !!!
 - > In some areas like Bodensee region it reach even -70%
- Austria
 - > Huge losses even -80% (second year in row) harvest 67 000 tons

COUNTRIES REVIEW

- POLAND
 - > Damages at least on level of 30% (so loss of 1,5 millions ton)
 - > 2 850 000MT vs 4 000 000MT in 2016
 - > Biggest losses in Jonagold/clones and Idared
 - > Dramatic situation of local growers especially those focused on apples
- Hungary
 - > Better harvest on amount of 628 000MT vs 498 000 in 2016
- Serbia
 - > Low losses expected especially in new professional plantations
 - > Good prospect for coming season as Russian market is open
- USA (number 2 globally)
 - > Apples +2%
 - > Running switch to new varieties like Honey Crisp, Pink Lady, Jazz etc..



EU 28

Apple production by country

x 1000 tons

Country	2008	2009	2010	2011	2012	2013	2014	2015	2016	F2017	(1)	(2)
Austria	159	185	189	190	157	155	188	177	40	67	68	-50
Belgium	338	344	288	305	220	220	318	285	234	74	-68	-73
Croatia	49	60	89	83	59	96	62	101	35	66	89	0
Czech Rep	157	145	103	79	118	121	131	156	139	108	-22	-24
Denmark	26	24	21	20	18	23	26	24	24	19	-21	-23
France	1.528	1.651	1.579	1.701	1.189	1.576	1.444	1.674	1.515	1.396	-8	-10
Germany	1.047	1.071	835	953	972	804	1.116	973	1.033	555	-46	-47
Greece	231	224	254	305	242	236	245	242	259	232	-10	-7
Hungary	583	514	488	301	750	585	920	522	498	628	26	-3
Italy	2.164	2.237	2.179	2.293	1.939	2.122	2.456	2.280	2.272	1.757	-23	-25
Latvia	34	13	12	6	9	15	10	8	10	5	-50	-46
Lithuania	74	74	46	49	39	40	27	46	50	44	-12	7
Netherlands	376	402	334	418	281	314	353	336	317	234	-26	-30
Poland	3.200	2.600	1.850	2.500	2.900	3.170	3.750	3.979	4.035	2.870	-29	-27
Portugal	245	274	251	265	221	284	272	329	263	314	19	9
Romania	329	379	423	412	351	387	382	336	327	309	-6	-11
Slovakia	42	48	32	33	36	42	46	40	17	31	82	-10
Slovenia	68	64	66	73	45	56	68	71	12	6	-50	-88
Spain	528	470	486	507	391	464	505	482	495	474	-4	-4
Sweden	18	18	20	17	14	17	16	21	20	18	-10	-5
UK	201	212	214	226	162	204	175	183	183	137	-25	-24
Total:	11.395	11.008	9.740	10.746	10.095	10.929	12.510	12.265	11.779	9.343	-21	-23

(1) Percentage difference between F2017 and 2016
 (2) Percentage difference between F2017 and the average of 2016 - 2015 - 2014

2017 season prospect

- EU apples crop is expected on level of 9 millions
 - > It is -30% in comparison to 2016 harvest
 - > Question mark is final quality and storability of fruits
- Higher prices are expected as results of lower production
 - > Are supermarkets and customers ready for increases of apple prices
- Lower crop will influence on juice concentrate production and prices
 - > Eg. 2016/season average in Poland was 0,08 Euro
 - > Today it is over 0,11Euro and we can expect that it can reach even 0,2 Euro
- Europe traders will be more interesting into SH apples
- Russian ban for fresh fruit import from EU is still in force

Import of apples

- Russia is biggest apples import globally.
 - > In 2015/2016 estimated import size was 741,3 tys. ton.
 - > For this season estimations shows almost the same number.
- 2015/16 biggest export to Russia
 - > Belarus – around 222 000 MT.,
 - > Serbia – 199 000 MT
 - > China over 113 MT
 - > Other are Moldavia, Kazakhstan, Azerbaijan, Macedonia and South Hemisphere countries



Challenges in Europe – sales and distribution

- Changes in local market
 - > Supermarkets
 - > Cooperatives
 - > Trading/Import companies
- Increasing quality requirements
 - > Quality
 - > Safety
 - > Year round supply
- New markets
 - > Europe/ Asia
 - > Middle East/North Africa
- New packages
- Club varieties



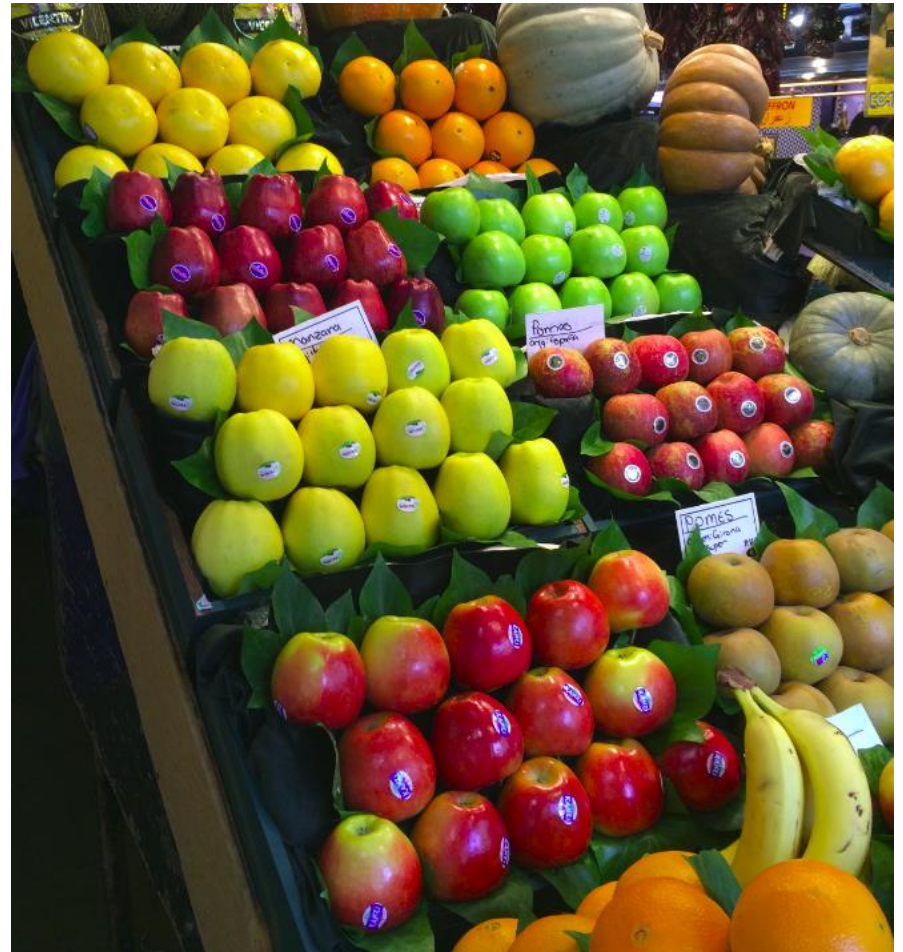
Challenges

- Other fruits
 - > Bananas and exotic fruits
- Power of supermarkets
- Increase of production in different countries
 - > EU 15 (Italy, France, Benelux)
 - > Russia, Serbia, Moldova ,Ukraine,
 - > South Hemisphere (Argentina, Chile, RSA NZ)
- Very strong competition
- Importance of Russian market
- Apples as not fashion fruit by young generation
-



New ways of apples selling

- New varieteis and club varieties
- Branding and trade marks
- New packages and distribution
- New sales form
- Promotion



New varieties –example of Gala clones evaluation



Tenroy Royal Gala®
Mitchgla Mondial Gala®

Galaxy
Baigent Brookfield®
Gala Schnitzer Schniga®

Simmons Buckeye®
Fendeca
Galaval
Gala SchniCo

Gala Schnico Red
Gala 2013 DarkBaron®
Galafab Galastar®
Devil Gala
Bigbucks

Over 40 club varieties are available for farmers and consumers today



PROMOTION



discover choose enjoy 2014-2017
SWEET & SOUR TASTE OF APPLES IMPORTED FROM EUROPE



PROGRAM EUROPEAN APPLES QUALITY NEWS & EVENTS PRESS ROOM ABOUT US CONTACT US

enjoy
FROM EUROPE
Bicolored apples

FRESH & NATURAL APPLES FROM EUROPE

Jonagored Gala Red Jonaprince Golden Delicious Idared Champion Najdared Gloster Ligol

<http://www.apples-europe.com/en/>

Branding

The image shows a screenshot of the Melinda website homepage. At the top left is the Melinda logo with the tagline "mi piace di più!". To the right of the logo are navigation links: "CONTACTS | PRESS AREA" with a search icon, "CONSORTIUM | VISITOR CENTRE | SALES POINTS | SHOP ONLINE" with a language dropdown set to "ENG", and "APPLES AND MORE | RECIPES | EVENTS | OUR ROOTS | BUSINESS SECTION". The main banner features a scenic mountain landscape with a lake and a town. The text "I like you 6 time more... tasting" is overlaid on the landscape. Below the text is a green button that says "FIND OUT ABOUT OUR APPLES AND PRODUCTS >>". In the foreground, six apples of different varieties are displayed on a wooden surface, each with a Melinda label and a circular award seal. A vertical navigation menu with four dots is on the left side of the banner. A white play button icon is at the bottom center of the banner.

BRANDING

Jabłka Grójeckie

JABŁKA GRÓJECKIE ZOSTAŁY WPISANE DO UNIJNEGO REJESTRU JAKO CHRONIONE OZNACZENIE GEOGRAFICZNE



Importance of social media in promotion and branding

The screenshot shows a Facebook profile for 'Jabłka Grójeckie'. The profile picture is a circular logo with a woman's face and the text 'CERTYFIKOWANE JABŁKA GRÓJECKIE' and 'CERTIFIED APPLES FROM GROJEC'. Below it is the slogan 'The taste of beauty'. The cover photo features a large red apple with the same logo on it, and a black and white illustration of an apple tree branch. The page has a search bar, navigation links like 'Strona główna' and 'Szukaj znajomych', and a 'Wyślij wiadomość' button. Below the cover photo, there are interaction buttons: 'Lubię to!', 'Obserwuj', 'Udostępnij', and a menu icon. A notification says '15 zdjęć zostało udostępnionych przez inne osoby. Pokaż wszystkie'. The 'Albumy' section shows four images: a group of people, a close-up of a red apple on a tree, the 'The taste of beauty' logo, and a certificate of origin.



Appolonia
传统 | 自然 | 高质量

几句话一开始就

几句话一开始就

Appolonia 有限责任公司由五家水果生产集团联合创建。本项目开创者为: Applex 有限责任公司, La-sad 有限责任公司, 'Sadeks' 生产合作社, 位于 Lewiczyn 的 'Polsad' 果园合作社以及 wój Owoc 有限责任公司。由于几家水果生产厂结合其经验所创建的实体在供应水果行业的所有方面领域的专业态度及敬业精神而著名。



水果蔬菜展覽會

03, 2015

2015年2月4日至6日, 將在著名的柏林水果蔬菜貿易博覽會舉行。會有 Appolonia 站在它們, 這將提供給公眾在 CityCube 廳 B / C-05。

歡迎。
回訪更多



O NAS



Lubsad Sp. z o.o.



FruVitaland Sp. z o.o.

PRODUKTY

KLIENCI

GALERIA

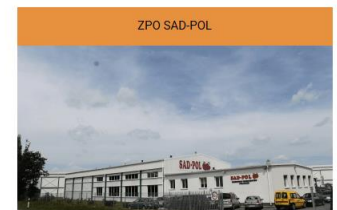
KONTAKT



Józefow Sad Sp. z o.o.



Witabo Sp. z o.o.



ZPO SAD-POL





Köszönöm a figyelmet