



Wer soll zukünftig unsere Produkte essen ?

Gedanken und Zahlen zu Apfelproduktion und Apfelkonsum

25. Thüringer Obstbautag

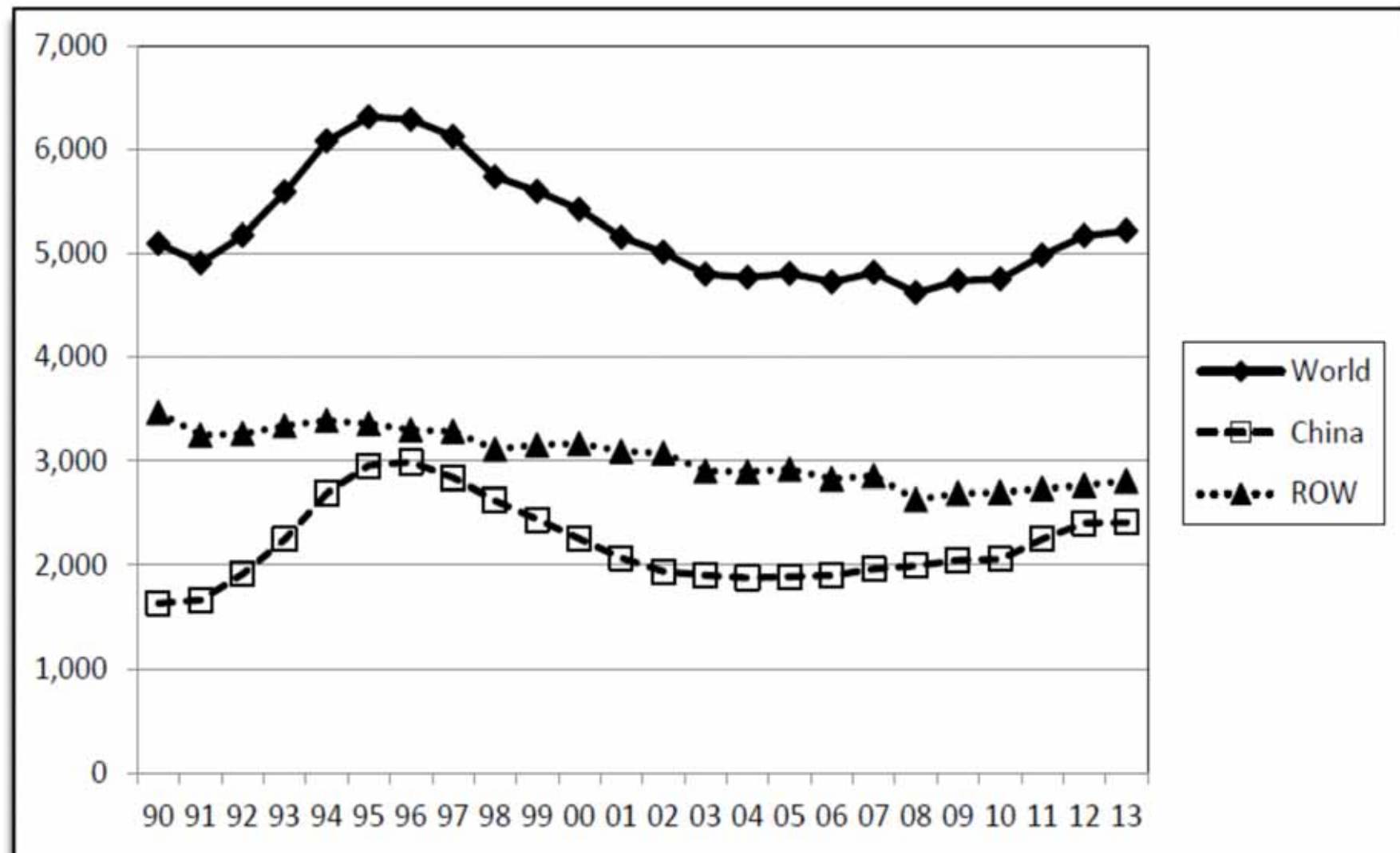


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World: Area of Apples Harvested, 1990-2013

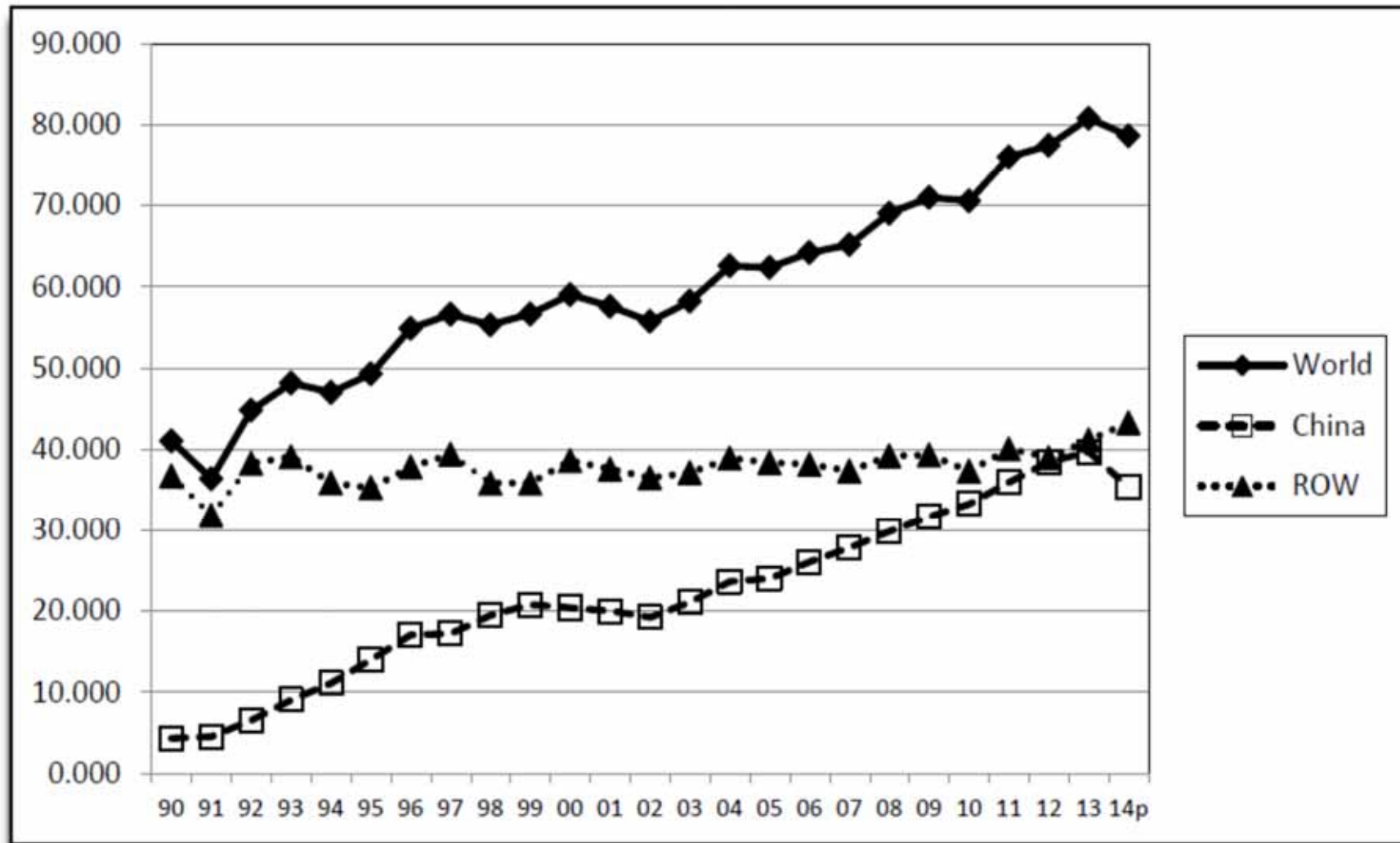
(thousand hectares)



Region	1996-98	2003-05	2011-13	'11-13 v 03-05
	(1,000 ha)	(1,000 ha)	(1,000 ha)	(% change)
Africa	117.9	132.0	144.7	+ 9.6
Asia	3,839.2	2,891.7	3,557.0	+ 23.0
Europe	1,636.3	1,366.6	1,042.3	- 23.7
North America	217.3	176.0	148.2	- 15.8
South America	132.7	130.9	133.2	+ 1.8
Oceania	35.3	31.5	30.9	- 1.9
WORLD	6,042.2	4,789.6	5,123.6	+ 7.0
<i>Memos</i>				
China	2,815.6	1,889.2	2,355.0	+ 24.7
Other Asia	1,023.6	1,002.5	1,202.0	+ 19.9
Western Europe	147.8	120.5	99.8	- 17.2
Eastern Europe	1,216.2	995.0	698.7	- 29.8
Southern Hemisphere	183.6	186.8	186.8	+ 0.0

World: Trends in Apple Production, 1990-2014

(million metric tons)



World: Apple Production, by Region, Selected Years
1996-98, 2003-05 and 2011-13
 (thousand hectares)

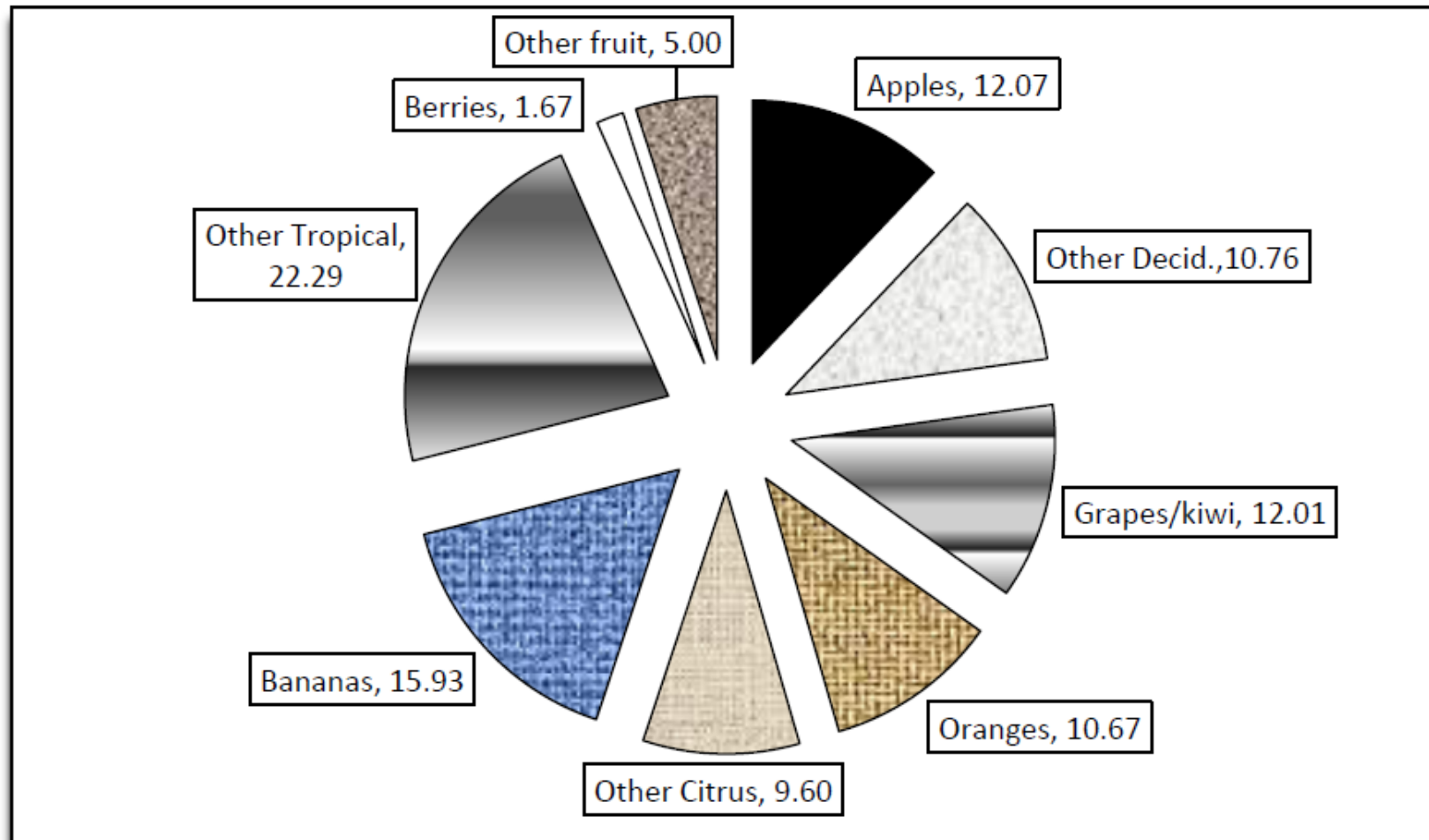
Region	1996-98	2003-05	2011-13	'11-13 v 03-05
	(1,000 ha)	(1,000 ha)	(1,000 ha)	(% change)
Africa	1,487	1,913	2,410	+ 26.0
Asia	28,064	33,369	50,176	+ 50.4
Europe	17,532	15,972	15,367	- 3.8
North America	5,872	4,754	4,506	- 5.2
South America	3,204	3,670	4,247	+ 15.7
Oceania	861	826	737	- 10.8
WORLD	56,896	61,078	78,122	+ 27.9
<i>Memos</i>				
China	17,928	24,582	38,054	+ 54.8
Other Asia	10,136	8,787	12,122	+ 38.0
Western Europe	4,897	4,503	3,839	- 14.7
Eastern Europe	6,064	7,156	7,147	- 0.1
Southern Hemisphere	4,503	5,212	5,779	+ 10.9

World: Production of Major Fruits, Selected Years

(Annual average for three-year periods, 1,000 metric tons)

Fruits/Fruit Group	1991-93 (1,000 mt)	2001-03 (1,000 mt)	2011-13 (1,000 mt)	2011-13 v 2001-03 (% change)
Total Deciduous	78,112	106,909	148,112	+ 38.5
Apples	44,280	57,287	78,122	+ 36.4
Other Deciduous	33,832	49,622	69,990	+ 41.0
Grapes & Kiwifruit	58,319	64,364	74,915	+ 16.4
Total Citrus	84,574	106,160	133,485	+ 25.9
Oranges	53,897	60,596	70,501	+ 16.3
Other Citrus	30,677	45,564	62,984	+ 38.2
Total Tropical	130,665	174,333	251,176	+ 44.1
Bananas	50,757	68,785	106,226	+ 54.4
Other Tropical	79,908	105,548	144,950	+ 37.3
Berries	4,508	7,335	10,592	+ 44.4
Other Fresh Fruit	16,280	24,217	32,392	+ 33.8
TOTAL FRUIT	372,458	483,318	650,672	+ 34.6
Total, exc Apples	328,178	426,031	572,551	+ 34.4

World: Share of the Total Fruit Pie, 2013 (Percent of Total Fruit Production)



EU-15: Imports of Selected Fruits, 2000-2014

(1,000 metric tons)

Fruit Group	2000	2005	2010	2011	2012	2013	2014
	(1,000 mt)	(1,000 mt)	(1,000 mt)	(1,000 mt)	(1,000 mt)	(1,000 mt)	(1,000 mt)
Bananas	5,057	5,093	6,198	6,396	6,242	6,712	6,853
Melons/Watermelons	1,124	1,445	1,662	1,526	1,682	1,713	1,777
Dates, Figs, Pineapples	973	1,661	2,171	2,204	2,158	2,179	2,423
Grapes	1,474	1,724	1,719	1,665	1,653	1,701	1,659
Citrus Fruits, Fresh	5,017	5,304	5,451	5,204	5,428	5,555	5,209
Fruits, NES, Fresh	1,085	1,366	1,425	1,463	1,515	1,487	1,483
Apples/ Pears	3,383	4,082	3,540	3,520	3,381	3,505	3,183
Stone Fruit	1,210	1,354	1,284	1,292	1,349	1,413	1,376
TOTAL	17,996	22,029	23,441	23,270	23,408	24,265	23,963
Total, exc Bananas	12,939	16,936	17,243	16,874	17,166	17,553	17,110

Top Apple Producing Countries in 2013: Volume of Production, Selected Years, 1995-2014 (1,000 metric tons)

Rank 2013	Country	1995	2000	2005	2010	2011	2012	2013	2014p
1	China	14,017	20,437	24,017	33,265	35,987	38,498	39,684	35,386
2	United States	4,798	4,682	4,409	4,215	4,275	4,110	4,082	5,104
3	Turkey	2,100	2,400	2,570	2,600	2,680	2,889	3,128	2,233
4	Poland	1,288	1,450	2,075	1,878	2,493	2,877	3,085	3,540
5	Italy	1,940	2,232	2,192	2,205	2,411	1,991	2,217	2,388
6	India	1,200	1,050	1,739	1,777	2,891	2,203	1,915	2,500
7	France	2,516	2,157	2,241	1,788	1,857	1,385	1,737	1,687
8	Chile	850	805	1,300	1,624	1,588	1,625	1,710	1,678
9	Iran	1,990	2,142	2,662	1,662	1,843	1,700	1,693	2,500
10	Russian Federation	1,200	1,832	1,786	992	1,200	1,403	1,572	1,550
11	Argentina	1,146	833	1,206	1,050	1,044	947	1,245	907
12	Brazil	686	1,153	851	1,279	1,339	1,340	1,231	1,234
13	Ukraine	1,046	648	720	897	954	1,127	1,211	1,295
14	South Africa	518	574	680	724	781	796	812	874
15	Germany	572	1,131	891	835	998	972	804	900
-	WORLD	49,309	59,052	62,388	70,586	76,054	77,489	80,823	78,667
-	China (%)	28.4	34.6	38.5	47.1	47.3	49.7	49.1	45.0
-	World, exc China (%)	71.6	65.4	61.5	52.9	52.7	50.3	50.9	55.0
-	Top Five (%)	49.0	52.8	56.5	62.6	62.9	65.0	64.6	61.8
-	Top Ten (%)	64.7	66.4	72.1	73.7	75.2	75.7	75.3	74.4
-	Top 15 (%)	72.7	73.7	79.1	80.5	82.0	82.4	81.8	81.1

World: Apple Production Trends and Forecasts, Actual 2010 and Forecast 2015, 2020 and 2025 (1,000 metric tons)

Region or Country	2010, Actual	2015, Forecast	2020, Forecast	2025, Forecast
France	1,788.4	1,800.0	1,850.0	1,900.0
Italy	2,205.0	2,264.0	2,366.0	2,396.0
Poland	1,877.9	3,280.0	3,655.0	3,700.0
Other Europe	7,944.5	9,035.1	9,397.6	9,661.1
Total Europe	13,815.8	16,379.1	17,268.6	17,657.1
United States	4,214.6	4,958.0	5,535.0	5,900.0
Other North America	957.3	1,109.3	1,170.3	1,228.0
Total North America	5,171.9	6,067.3	6,705.3	7,128.8
China	33,265.2	41,580.0	45,700.0	49,454.0
Turkey	2,600.0	2,950.0	3,185.0	3,400.0
Other Asia	8,285.5	10,890.1	11,553.2	12,293.3
Total Asia	44,150.7	55,420.1	60,438.2	65,147.3
Total South America	4,261.3	4,299.9	4,434.0	4,584.0
South Africa	724.2	875.0	924.0	979.0
Total Oceania	777.4	905.0	1,003.9	1,066.5
Total Southern Hemisphere	5,762.9	6,079.9	6,361.9	6,629.5
Russian Federation	992.0	1,350.0	1,480.0	1,550.0
Other Producing Countries	692.5	1,567.2	1,640.0	1,672.7
WORLD TOTAL	70,585.8	86,863.6	93,894.0	99,785.4

Apfelproduktionssteigerungen bis 2025

- Europa total +10 %
- Polen +20%
- USA +17%
- China +18%
- Südl. Hemisphere +10%
- Russische Föderation +10%

Top Ten Fresh Apple Exporters, 2008-2014 (metric tons)

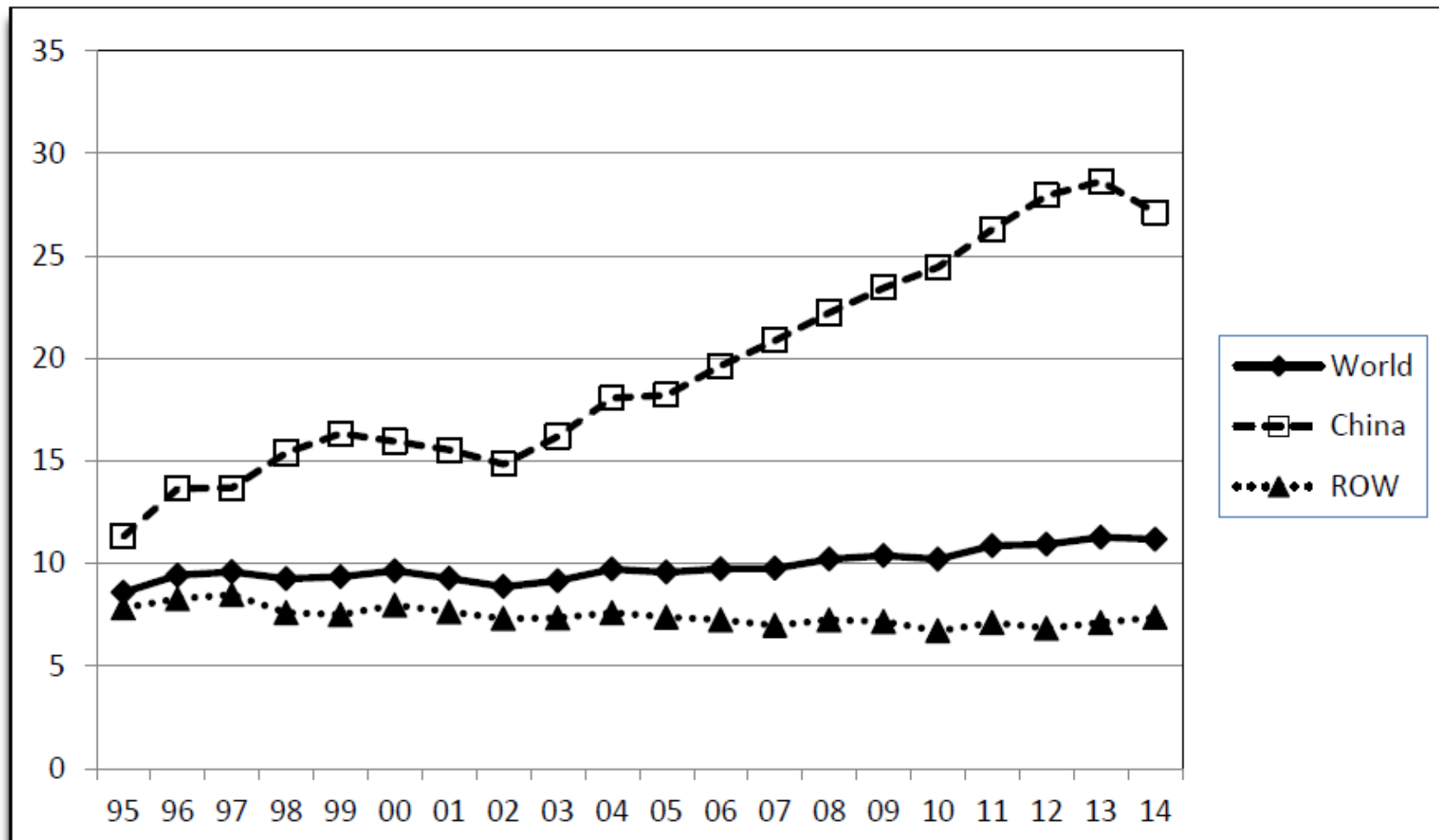
Country	2008	2009	2010	2011	2012	2013	2014p
	(mt)	(mt)	(mt)	(mt)	(mt)	(mt)	(mt)
China	1,153,326	1,171,805	1,122,953	1,034,635	975,878	994,664	865,048
Poland	370,991	777,071	728,500	532,058	941,678	1,216,294	1,026,593
Italy	683,377	732,794	856,596	976,131	933,361	787,795	975,249
United States	712,527	816,167	790,376	826,438	870,185	890,463	889,954
Chile	766,254	678,629	842,668	801,167	761,984	833,251	820,184
France	684,081	611,279	695,760	726,609	625,943	542,921	695,865
South Africa	358,119	338,829	307,783	333,435	580,992	482,435	381,865
New Zealand	260,759	302,854	284,187	296,931	309,464	350,011	336,785
Netherlands	391,778	406,676	352,844	341,296	318,587	316,742	164,997
Belgium	261,917	286,306	245,806	269,144	180,608	218,111	174,264
Top Ten	5,643,129	6,122,410	6,227,473	6,137,844	6,498,680	6,632,687	6,330,804
World Total	7,807,968	7,915,610	8,595,195	8,262,933	7,750,000	8,500,000	8,100,000
Top Ten %	72.3	77.3	72.5	74.3	83.9	78.0	78.2

Top Ten Fresh Apple Importers, 2008-2014

(metric tons)

Country	2008	2009	2010	2011	2012	2013	2014p
	(mt)	(mt)	(mt)	(mt)	(mt)	(mt)	(mt)
Russian Fed.	1,062,904	1,108,205	1,204,175	1,157,724	1,278,551	1,352,347	1,000,000
Germany	613,268	622,564	621,502	672,823	593,485	658,423	605,502
United Kingdom	381,809	455,671	460,722	459,187	476,525	479,540	446,117
Netherlands	396,415	360,250	324,406	310,636	336,218	353,546	260,984
Mexico	188,423	222,209	221,301	198,481	235,893	274,978	248,000
Spain	227,886	238,712	253,496	244,081	223,046	239,415	247,167
Canada	166,181	182,119	191,717	198,618	202,608	233,589	222,058
United States	165,282	155,775	191,579	147,789	183,453	198,746	207,994
India	71,204	98,895	93,264	179,015	186,368	194,335	204,570
Saudi Arabia	156,727	50,747	176,572	181,280	187,139	189,295	195,000
Top Ten	3,430,099	3,495,147	3,738,734	3,749,634	3,903,286	4,174,214	3,637,392
World Total	7,367,001	7,445,165	8,250,673	8,057,892	7,548,851	8,338,082	7,900,000
Top Ten %	46.6	46.9	45.3	46.5	51.7	50.1	46.0

World: Per Capita Supplies of Apples, 1995-2014 (kilograms)



Europe: Estimated Per Capita Consumption of Fresh Apples, Selected Countries, 1991-2014 (kilograms)

Country/Region	1992-94	2002-04	2012-14	1992-94 to 2002-04	2002-04 to 2012-14
	(kg)	(kg)	(kg)	(% change)	(% change)
Austria	32.80	24.23	25.62	- 26.1	+ 5.7
Belgium	26.80	17.65	14.78	- 34.2	- 16.3
Denmark	16.03	19.62	19.17	+ 22.4	- 2.3
France	14.94	16.24	14.16	+ 8.7	- 12.8
Germany	24.31	18.92	18.95	- 22.2	+ 0.2
Greece	21.33	20.71	16.80	- 2.9	- 18.9
Italy	20.93	19.10	17.07	- 8.7	- 10.7
Netherlands	28.51	19.99	18.20	- 29.9	- 9.0
Spain	18.88	17.21	11.50	- 8.9	- 32.6
Sweden	16.42	15.19	13.93	- 7.5	- 8.3
United Kingdom	11.39	9.45	9.38	- 17.0	- 0.7
EU-11	19.51	16.84	15.14	- 13.7	- 10.1
Bulgaria	6.17	4.00	5.31	- 35.2	+ 32.8
Hungary	23.25	14.25	17.16	- 38.7	+ 20.4
Norway	16.27	15.12	15.30	- 7.1	+ 1.2
Poland	12.23	13.37	17.92	+ 9.4	+ 34.0
Romania	24.71	20.96	16.54	- 15.2	- 21.1
Serbia	16.84	13.35	5.72	- 20.7	- 57.1
Slovakia	11.15	8.96	9.14	- 19.6	+ 2.0
Other Europe	16.29	14.26	14.79	- 12.5	+ 3.8

**Other Major Producing Countries: Estimated Per Capita
Consumption of Fresh Apples, Selected Countries, 1991-2014
(kilograms)**

Country/Region	1992-94	2002-04	2012-14	1992-94 to 2002-04	2002-04 to 2012-14
	(kg)	(kg)	(kg)	(% change)	(% change)
Argentina	8.32	7.30	8.37	- 12.2	+ 14.6
Australia	9.53	6.55	11.13	- 31.3	+ 69.9
Brazil	3.47	4.39	4.30	+ 26.6	- 2.1
Chile	6.39	7.13	11.15	+ 11.6	+ 56.5
New Zealand	14.78	14.42	14.98	- 2.4	+ 3.9
South Africa	5.31	3.79	4.12	- 28.6	+ 8.6
S Hemisphere	5.07	5.08	5.63	+ 0.4	+ 10.8
China	4.78	12.64	24.22	+164.5	+ 91.6
Japan	6.64	5.52	5.29	- 16.9	- 4.2
Taiwan	6.10	5.55	6.55	- 9.1	+ 18.0
Turkey	34.65	32.24	33.85	- 7.0	+ 5.0
Asia Selected	6.16	12.81	22.95	+107.8	+ 79.2
Canada	12.25	12.17	11.56	- 0.7	- 5.0
Mexico	5.61	5.60	6.77	- 0.2	+ 21.0
United States	8.72	7.80	6.69	- 10.5	- 14.2
N America	8.26	7.88	7.08	- 8.0	- 6.8
Russian Federation	4.92	6.40	13.66	+ 30.1	+113.5
All 32 countries (excluding China)	8.42	11.43	16.79	+ 35.8	+ 46.8
	11.48	10.42	10.64	- 9.3	+ 2.2

Non-Producing Countries: Estimated Per Capita Consumption of Fresh Apples, 1990-2013 (kilograms)

Country/Region	1990	1995	2000	2005	2010	2011	2012	2013p
East Asia								
Indonesia	0.01	0.23	0.35	0.56	0.82	0.87	0.74	0.52
Hong Kong	9.74	11.53	7.64	8.49	9.99	8.57	8.67	8.74
Malaysia	1.28	2.71	3.12	3.23	3.55	3.30	3.42	3.59
Philippines	0.54	0.78	0.89	0.79	0.75	0.76	0.80	0.87
Singapore	9.65	12.36	9.05	8.61	8.88	7.26	7.55	7.81
Taiwan	3.82	5.17	6.16	6.18	5.86	5.89	5.78	6.41
Thailand	0.42	1.09	0.68	1.46	1.92	1.84	1.95	2.14
Subtotal	0.68	1.17	1.18	1.40	1.60	1.57	1.53	1.52
Middle East								
Bahrain	8.11	13.86	6.74	12.95	5.84	6.56	7.92	n.a.
Egypt	0.00	0.33	0.58	0.79	1.37	2.12	2.75	1.19
Kuwait	5.20	12.48	10.42	6.51	7.03	6.98	n.a.	8.37
Libya	4.02	1.48	0.96	1.69	8.44	4.53	n.a.	n.a.
Oman	4.41	4.50	3.07	15.36	9.06	7.29	29.17	8.23
Saudi Arabia	8.27	6.85	5.29	5.72	6.22	6.35	6.49	6.40
UAE	13.32	22.99	34.38	9.68	10.87	15.56	n.a.	n.a.
Subtotal	2.52	2.81	2.72	2.77	3.73	3.42	n.a.	n.a.
Latin America								
Colombia	0.75	1.48	1.17	1.19	1.82	1.90	1.99	2.07
Costa Rica	1.60	2.04	3.10	1.70	3.21	3.33	3.27	3.19
Dominican Rep	0.14	0.49	1.00	1.43	1.47	1.34	1.47	1.08
El Salvador	0.95	0.99	1.48	1.95	1.94	2.05	1.90	1.82
Honduras	0.42	0.32	0.46	1.18	1.60	1.60	1.40	n.a.
Nicaragua	0.06	0.16	0.31	0.37	0.35	0.38	0.34	0.42
Panama	1.93	2.09	2.54	2.17	2.01	2.01	2.09	2.09
Peru	0.11	0.63	0.59	0.92	1.63	1.33	1.45	1.40
Venezuela	0.59	1.11	1.92	1.17	0.52	0.15	n.a.	0.41
Subtotal	0.56	1.05	1.22	1.19	1.48	1.37	n.a.	n.a.
Total 23 countries	0.94	1.40	1.44	1.59	1.94	1.85	n.a.	n.a.

Apfelkonsum

- Der Apfelkonsum in allen „alten“ Hauptproduktionsregionen sinkt stetig
- Konsumsteigerungen vor allem in den nicht produzierenden Ländern, CHINA und den „emerging-markets“
- Bei bestenfalls gleich bleibenden Konsum in Mitteleuropa wird das Angebot bis 2025 weiter um etwa 10% steigen

Apfelkonsum

- China war in der Vergangenheit ein untergeordnetes Problem → wirtschaftliches Wachstum → alle 6 Jahre Verdopplung der Konsumausgaben je Einwohner → Bedarf nach Äpfeln stieg schneller als Produktion
- Dies kehrt sich nun um !!!

Handel

- Aber:
- Der weltweite Apfelverbrauch wird schneller steigen als die Weltbevölkerung
- Produktion wächst global langsamer als der Bedarf
- Möglicher Ausweg: die entsprechenden Märkte finden

Lösungswege

- Deutliche Steigerung der Exporttonnagen
- Erschließung neuer Märkte (Asien, Mittlerer Osten, Nord/Südamerika, Afrika etc.)
- Umstellung der Sortimente inkl. Saisonverlängerung
- Beteiligungen an Unternehmen (Import/Export)
- Verbesserung der Lagerqualitäten
- Alternative Produkte: BIO

- Ein Beispiel:

**Chile: Apple Exports, by Major Varieties,
Selected Three-Year Averages, 1991-94 to 2011-14 Seasons
(percent)**

Variety	1991-94	1996-99	2001-04	2006-09	2011-14
All Red Delicious	58.8	45.2	32.5	22.0	14.8
All Golden Delicious	0.2	0.3	0.5	0.4	0.1
All Granny Smith	38.4	27.9	18.8	17.0	13.5
Gala	0.8	16.7	30.1	39.5	44.6
Fuji	0.2	4.9	7.2	7.2	8.0
Braeburn	0.1	3.7	5.0	4.4	2.6
Cripps Pink/Pink Lady	0.0	0.0	3.9	7.4	12.3
Newer Varieties	0.0	0.0	0.0	0.0	2.0
All Other	1.5	1.3	2.9	2.1	2.1
TOTAL	100.0	100.0	100.0	100.0	100.0

Main Apple Producing Countries: International Competitiveness Rankings, 2015

Rank 2015	Rank 2014	Overall Ranking	Production Efficiency	Infrastructure & Inputs	Financial & Markets
1	3	New Zealand	Austria	United States	Belgium
2	2	United States	Italy	Chile	Netherlands
2	1	Chile	Chile	New Zealand	France
4	4	Italy	South Korea	Canada	Japan
5	8	Austria	New Zealand	South Africa	Italy
6	9	Belgium	China	Brazil	Austria
7	5	France	South Africa	Austria	New Zealand
8	10	Netherlands	Belgium	France	Germany
9	6	Japan	Netherlands	Italy	United Kingdom
10	7	South Korea	Germany	Turkey	South Korea
11	12	Germany	United States	Argentina	Spain
12	11	Canada	France	Japan	United States
13	14	South Africa	Brazil	South Korea	Canada
14	13	United Kingdom	Japan	Belgium	Portugal
15	16	Australia	United Kingdom	Netherlands	Poland
16	15	Brazil	Argentina	Germany	Australia
17	18	Spain	Portugal	Australia	Chile
18	21	Portugal	Australia	Spain	Slovakia
19	17	China	Poland	United Kingdom	Mexico
20	20	Poland	Canada	China	Slovenia
21	19	Argentina	Slovakia	Poland	Greece
22	22	Turkey	Greece	Portugal	Czech Republic
23	27	Slovakia	Turkey	Mexico	Hungary
24	26	Mexico	Czech Republic	Greece	Bulgaria
25	24	Greece	Slovenia	Slovenia	South Africa
26	23	Slovenia	Hungary	Hungary	China
27	25	Czech Republic	Serbia	Czech Republic	Romania
28	28	Hungary	Spain	Slovakia	Serbia
29	29	Bulgaria	Mexico	India	Brazil
30	31	Serbia	Romania	Serbia	Turkey
31	32	Romania	India	Bulgaria	Russian Federation
32	30	India	Bulgaria	Russian Federation	Argentina
33	33	Russian Federation	Russian Federation	Romania	India

Zusätzliche Störfeuer

- Geopolitische Lage / Wirtschaftskrisen
- Freihandelsabkommen (TTIP, CETA)
- Embargen (Russland-EU, Russland-Türkei)
- „Freier Markt IRAN“
- Währungsrisiken (emerging markets)
- Trägheit der Produktion
- Fehlende Unterstützung deutscher und europäischer Politik (phytosanitäre Abkommen)
- Protektionistische Tendenzen (Abschottung)

Datenquellen: WAPA, July 2015
WorldAppleReview2015, Belrose Inc.

Fragen ???

Sehr gerne ...

