SOUTHERN HEMISPHERE FRESH APPLE AND PEAR CROP FORECAST

FEBRUARY 2015

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INTRODUCTION

WAPA is pleased to provide the 2015 apple and pear crop estimate for the Southern Hemisphere. This report has been compiled with the support of ASOEX (Chile), CAFI (Argentina), ABPM (Brazil), SAAPPA (South Africa), APAL (Australia) and Pipfruit New Zealand (New Zealand) and provides consolidated data from the 6 leading Southern Hemisphere countries. Compiling these data, has previously proved a valuable exercise for the global apple and pear industry and a reliable source of information when the season progressively shifts from the Northern to the Southern Hemisphere.

Placing first the focus on apples, 2015 crop forecast suggests on an aggregate basis a noteworthy increase compared to last year influenced by Australia (+13%), New Zealand (+13%), South Africa (+10%) and Brazil (+6%), with no countries showing a decrease. Argentina and Chile also forecast a slight increase of +2 and +1%. This year's crop is consequently estimated at 5.542.000 T up 5% on that of last year, and up 2% on the running average of crops between 2012 and 2014. Chile remains the largest southern hemisphere apple producer in 2015 at 1.678.000 T, while Brazil keeps the second place with 1.234.000 T. Argentina remains third with 907.000 T and South Africa is not far behind at 874.000 T. Forecasted export figures decrease by 5% to 1.723.056 T.

Looking at pears, Southern Hemisphere growers predict an increase of the crop compared to 2014. Indeed, it is reported that the 2015 crop will increase by 5% on that of last year to 1.583.000 T and will also be up 4% compared to the overall average of years 2012-2014. New Zealand (+30%), Chile (+15%), Argentina (+10%) and Australia (+4%) all report an increase, whereas South Africa is the only to report a decrease of -3%. Forecasted export figures for pears are reported to be 4% up compared to 2014 at 752.638 T.

As an additional note, the figures for Argentina are expected to change still, given the impact of heavy hail at the beginning of February 2015.

This report is also providing breakdown information by varieties and is detailing the market offer between export, domestic and industry.

All data are presented in metric tonnes.

SOUTHERN HEMISPHERE APPLES FORECAST 2015

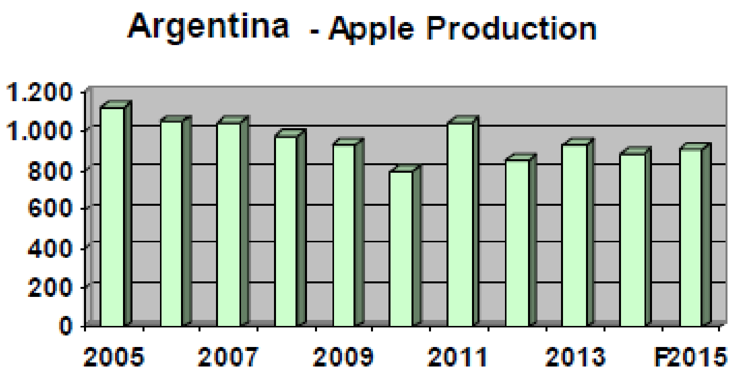
ARGENTINA *Figures might no longer be accurate given heavy hail at the beginning of February

Apple production

x 1000 tons

Variety	2007	2008	2009	2010	2011	2012	2013	2014	F2015	(1)	(2)
Granny Smith	203	196	165	148	225	198	165	189	180	-5	-2
Red Delicious	601	576	560	435	685	529	601	541	540	0	-3
Royal Gala	113	112	83	86	98	90	122	120	112	-7	1
Other	130	97	125	131	40	36	42	40	75	88	91
Total Argentina	**1.047**	**980**	**933**	**800**	**1.048**	**853**	**930**	**890**	**907**	**2**	**3**

(1) Percentage difference between F2015 and 2014
(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014



Apple market offer

MT	Market	2011	2012	2013	2014	F2015
Production		**1.048.071**	**853.022**	**930.269**	**890.300**	**907.000**
Market offer	Export	212.903	133.233	163.500	160.600	149.900
	Domestic	332.363	369.179	360.600	370.500	310.706
	Industry	502.805	350.610	406.169	359.200	446.394
	Total	1.048.071	853.022	930.269	890.300	907.000

AUSTRALIA

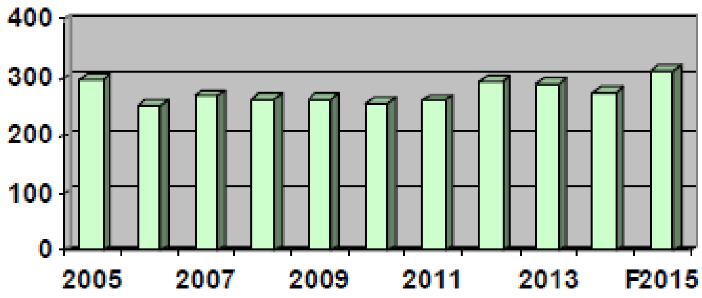
Apple production

x 1000 tons

Variety	2007	2008	2009	2010	2011	2012	2013	2014	F2015	(1)	(2)
Bonza	1	2	1	1	1	1	0	0	0	#Num!	-100
Braeburn	3	3	3	3	3	3	1	0	0	#Num!	-100
Cripps pink	56	60	62	64	81	89	90	96	114	18	24
Cripps red	20	20	20	18	14	15	19	15	18	20	9
Red Delicious	39	38	38	34	26	29	26	15	17	16	-26
Fuji	22	20	21	17	19	21	22	25	29	17	28
Golden Delicious	16	12	10	8	6	7	5	9	9	6	34
Granny Smith	65	59	60	60	71	85	80	52	56	7	-23
Jonagold & Jona	4	3	3	3	3	3	1	1	1	0	-47
Lady Williams	2	2	2	2	2	2	2	1	0	-100	-100
Royal Gala	37	39	40	41	29	32	36	55	64	17	57
Other	3	3	4	4	5	6	7	7	4	-45	-43
Total Australia	**267**	**262**	**263**	**255**	**260**	**293**	**289**	**275**	**311**	**13**	**7**

(1) Percentage difference between F2015 and 2014
(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014

Australia - Apple Production



BRAZIL

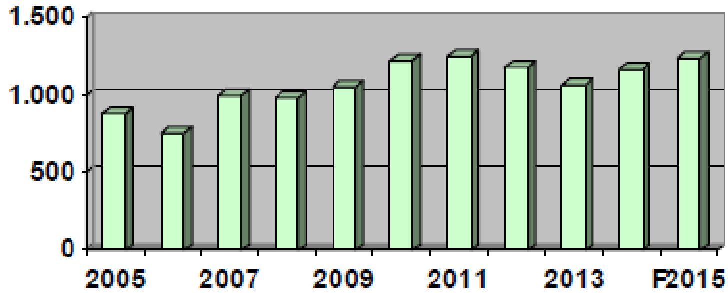
Apple production

x 1000 tons

Variety	2007	2008	2009	2010	2011	2012	2013	2014	F2015	(1)	(2)
Fuji Other Clon	357	353	354	430	374	416	358	451	465	3	14
Gala Other Clo	595	570	642	733	807	679	619	610	679	11	7
Other	42	61	57	64	69	89	86	104	90	-14	-3
Total Brazil	**993**	**983**	**1.053**	**1.226**	**1.250**	**1.184**	**1.063**	**1.165**	**1.234**	**6**	**8**

(1) Percentage difference between F2015 and 2014
(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014

Brazil - Apple Production



Apple market offer

MT	Market	2011	2012	2013	2014	F2015
Production		1.250.000	1.184.243	1.063.000	1.165.394	1.252.227
Market offer	Export	48.665	72.096	85.467	44.294	50.000
	Domestic	826.335	816.147	743.533	856.100	952.227
	Import	96.565	57.920	95.075	116.697	70.000
	Domestic fresh offer	922.900	874.067	838.608	972.797	1.022.227
	Industry	375.000	296.000	234.000	265.000	250.000
Brazilian population (000)		194.933	196.526	198.043	199.492	200.882
Fresh consumption (kg/hab)		4,73	4,45	4,23	4,88	5,09

CHILE

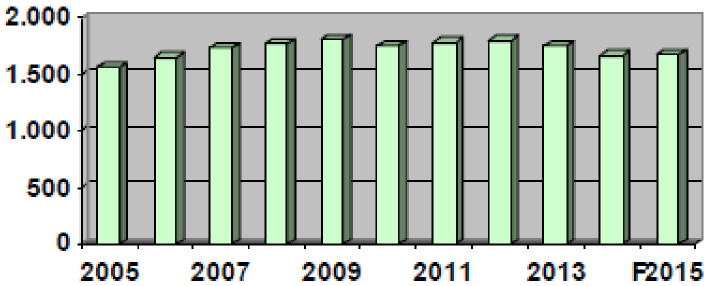
Apple production

x 1000 tons

Variety	2007	2008	2009	2010	2011	2012	2013	2014	F2015	(1)	(2)
Braeburn	79	67	67	64	54	53	61	58	56	-3	-2
Cripps pink	62	79	85	92	89	124	148	167	164	-2	12
Fuji	200	179	191	197	196	252	183	199	177	-11	-16
Gala	515	614	652	670	678	671	709	698	701	0	1
Granny Smith	414	419	430	396	392	371	319	227	289	27	-5
Red Delicious	418	371	334	284	339	300	257	244	223	-9	-16
Other	44	41	52	52	36	35	78	74	68	-9	9
Total Chile	**1.732**	**1.770**	**1.811**	**1.755**	**1.784**	**1.806**	**1.755**	**1.667**	**1.678**	**1**	**-6**

(1) Percentage difference between F2015 and 2014
(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014

Chile - Apple Production



Apple market offer

MT	Market	2011	2012	2013	2014	F2015
Production		1.784.000	1.765.000	1.746.000	1.670.190	1.708.000
Market offer	Export	794.000	758.000	823.000	798.000	801.000
	Domestic	357.000	353.000	314.000	313.000	306.000
	Industry	632.000	654.000	610.000	556.066	571.000
	Total	1.784.000	1.765.000	1.746.000	1.670.190	1.708.000

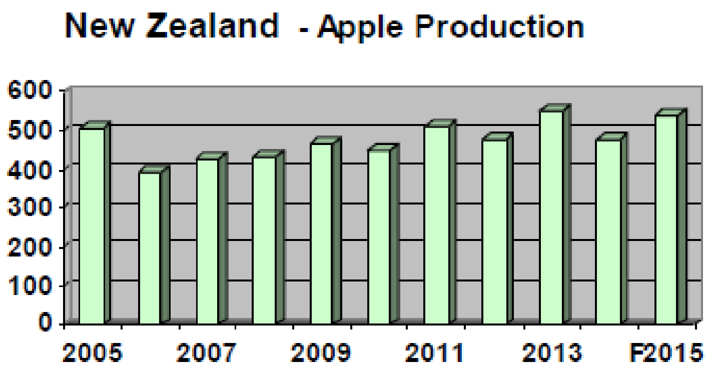
NEW ZEALAND

Apple production

x 1000 tons

Variety	2007	2008	2009	2010	2011	2012	2013	2014	F2015	(1)	(2)
Braeburn	167	127	146	121	132	120	128	111	112	1	-6
Cripps Pink		14	15	17	20	24	27	26	34	31	32
Fuji	30	43	43	45	60	48	60	43	54	26	7
Jazz	12	19	28	45	55	52	52	52	52	0	0
Royal Gala	156	154	152	151	163	144	161	141	156	11	5
Other	61	45	44	44	47	49	78	60	76	27	22
Pacific series		32	38	25	36	39	44	45	54	20	27
Total New Zealand	**427**	**434**	**466**	**448**	**513**	**476**	**550**	**478**	**538**	**13**	**7**

(1) Percentage difference between F2015 and 2014
(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014



Apple market offer

MT	Market	2011	2012	2013	2014	F2015
Production		513.149	475.122	550.860	478.350	538.347
Market offer	Export	299.643	285.049	324.685	310.669	298.443
	Domestic	66.600	59.850	69.902	63.549	69.120
	Industry	146.906	130.824	156.272	104.132	170.784
	Total	513.149	475.723	550.860	478.350	538.347

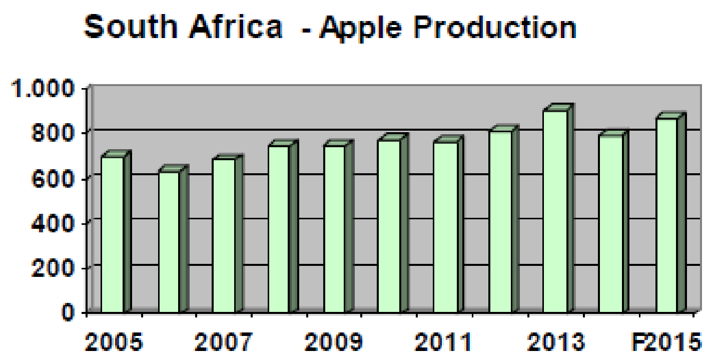
SOUTH AFRICA

Apple production

x 1000 tons

Variety	2007	2008	2009	2010	2011	2012	2013	2014	F2015	(1)	(2)
Braeburn	23	24	24	24	23	33	36	24	26	10	-15
Cripps pink	46	53	53	56	55	73	82	79	87	10	12
Fuji	28	34	34	41	40	57	63	64	70	10	14
Golden Delicio	165	159	159	161	160	203	227	151	166	10	-14
Granny Smith	161	182	182	182	180	171	190	199	218	10	17
Oregon Spur	9	9	9	8	8	8	9	8	9	10	4
Royal Gala	80	86	85	87	86	122	136	127	140	10	9
Starking	41	41	40	39	39	34	38	24	26	10	-18
Topred	43	43	43	43	42	41	45	32	35	10	-11
Other	93	118	117	135	133	71	80	87	96	10	21
Total South Africa	**689**	**749**	**747**	**775**	**768**	**813**	**907**	**794**	**874**	**10**	**3**

(1) Percentage difference between F2015 and 2014
(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014



Apple market offer

MT	Market	2011	2012	2013	2014	F2015
Production		768.125	813.192	906.827	794.177	873.595
Market offer	Export	318.993	358.456	434.663	339.321	423.713
	Domestic	231.285	209.198	203.173	207.236	221.468
	Industry	217.847	245.538	268.991	247.620	228.414
	Total	768.125	813.192	906.827	794.177	873.595

SOUTHERN HEMISPHERE
APPLE PRODUCTION BY COUNTRY

Apples

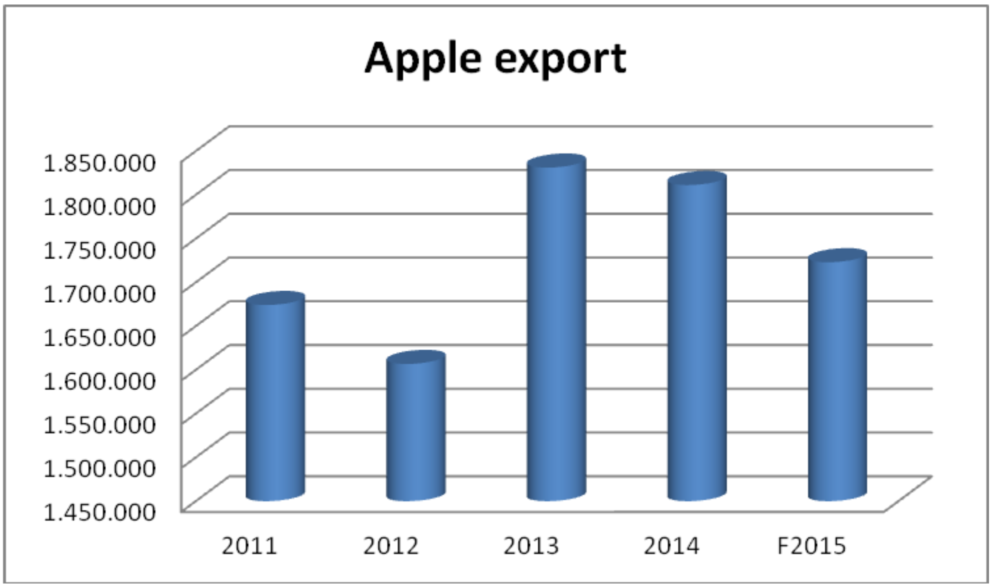
x 1000 tons

Country	2007	2008	2009	2010	2011	2012	2013	2014	F2015	(1)	(2)
Argentina	1.047	980	933	800	1.048	853	930	890	907	2	2
Australia	267	262	263	255	260	293	289	275	311	13	9
Brazil	993	983	1.053	1.226	1.250	1.184	1.063	1.165	1.234	6	8
Chile	1.732	1.770	1.811	1.755	1.784	1.806	1.755	1.667	1.678	1	-4
New Zealand	427	434	466	448	513	476	550	478	538	13	7
South Africa	689	749	747	775	768	813	907	794	874	10	4
Total	**5.156**	**5.178**	**5.272**	**5.260**	**5.623**	**5.426**	**5.494**	**5.269**	**5.542**	**5**	**2**

(1) Percentage difference between F2015 and 2014
(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014

SOUTHERN HEMISPHERE
APPLE EXPORTS BY COUNTRY

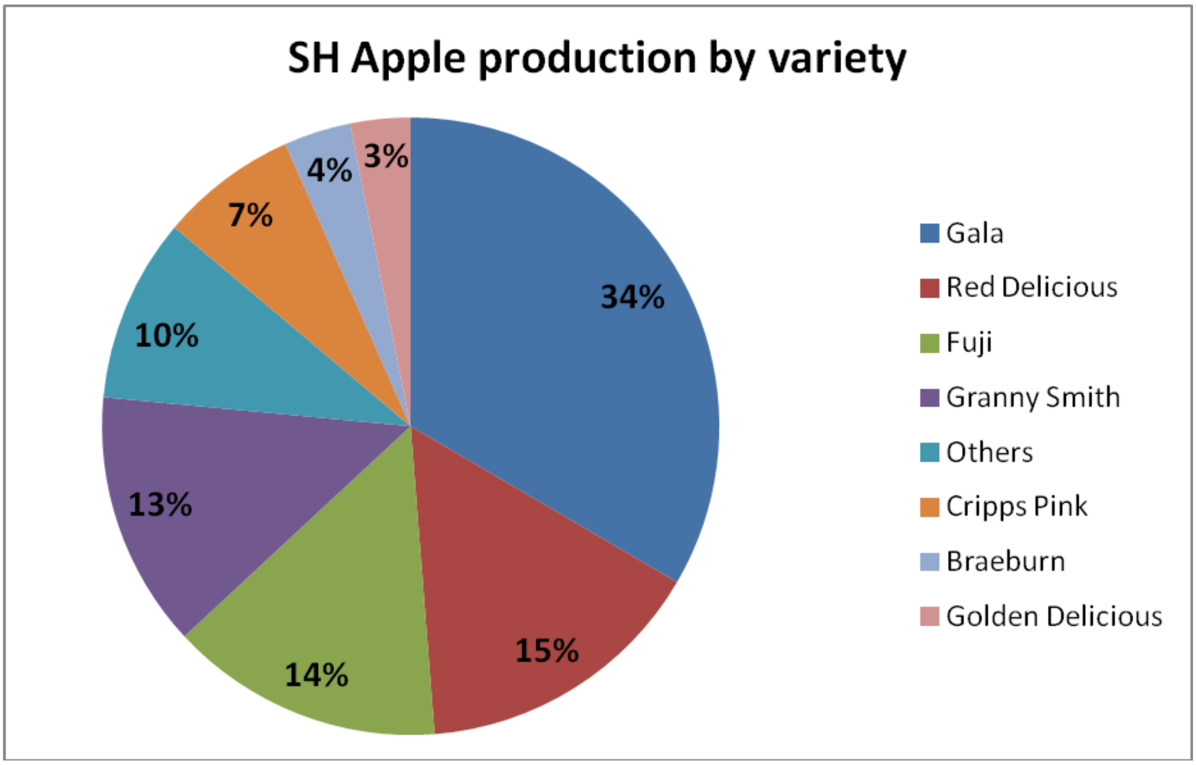
Country (MT)	2011	2012	2013	2014	F2015	-1	-2
Argentina	212.903	133.233	163.500	160.600	149.900	-7%	-2%
Brazil	48.665	72.096	85.467	44.294	50.000	13%	-26%
Chile	794.000	758.000	823.000	798.000	801.000	0%	1%
New Zealand	299.643	285.049	324.685	303.251	298.443	-2%	-2%
South Africa	318.966	358.456	434.663	397.452	423.713	7%	7%
TOTAL	**1.674.177**	**1.606.834**	**1.831.217**	**1.811.303**	**1.723.056**	**-5%**	**-2%**



SOUTHERN HEMISPHERE
APPLE PRODUCTION BY VARIETY

x 1000 tons

Variety	2007	2008	2009	2010	2011	2012	2013	2014	F2015	(1)	(2)
Braeburn	272	220	239	212	212	209	226	193	194	1	-7
Cripps pink	164	206	215	229	245	310	347	369	399	8	17
Fuji	636	629	643	729	689	794	686	781	794	2	5
Gala	1.496	1.574	1.654	1.768	1.862	1.738	1.784	1.751	1.852	6	5
Golden Delicious	181	172	169	169	166	210	232	159	175	10	-13
Granny Smith	843	856	837	786	868	825	754	667	743	11	-1
Red Delicious	1.152	1.078	1.025	843	1.140	941	976	863	850	-2	-8
Others	412	443	491	524	441	399	489	487	534	10	17
Total:	**5.156**	**5.178**	**5.272**	**5.260**	**5.623**	**5.426**	**5.494**	**5.269**	**5.542**	**5**	**2**



SOUTHERN HEMISPHERE PEARS FORECAST 2015

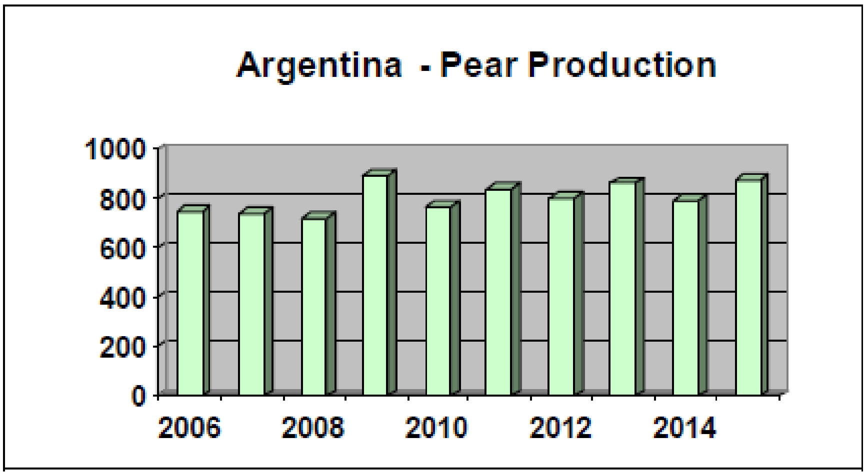
ARGENTINA *Figures might no longer be accurate given heavy hail at the beginning of February

Pear production

x 1000 tons

Variety	*2007*	*2008*	*2009*	*2010*	*2011*	*2012*	*2013*	*2014*	*F2015*	*(1)*	*(2)*
Anjou	78	80	92	90	92	92	86	95	90	5	-1
Packham's	257	250	290	250	261	247	246	266	270	10	7
Williams BC	287	273	345	280	390	361	413	338	416	1	12
Other	117	120	168	150	100	101	118	95	100	-15	-4
Total Argentina	**739**	**723**	**895**	**770**	**843**	**801**	**863**	**794**	**876**	**10**	**7**

(1) Percentage difference between F2015 and 2014
(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014



Pear market offer

MT	Market	2011	2012	2013	2014	F2015
Production		**843.037**	**801.488**	**829.558**	**794.350**	**876.000**
Market offer	Export	454.271	396.058	434.996	438.500	412.128
	Domestic	141.517	142.212	134.400	130.550	143.851
	Industry	247.249	263.218	260.162	225.300	320.121
	Total	843.037	801.488	829.558	794.350	876.100

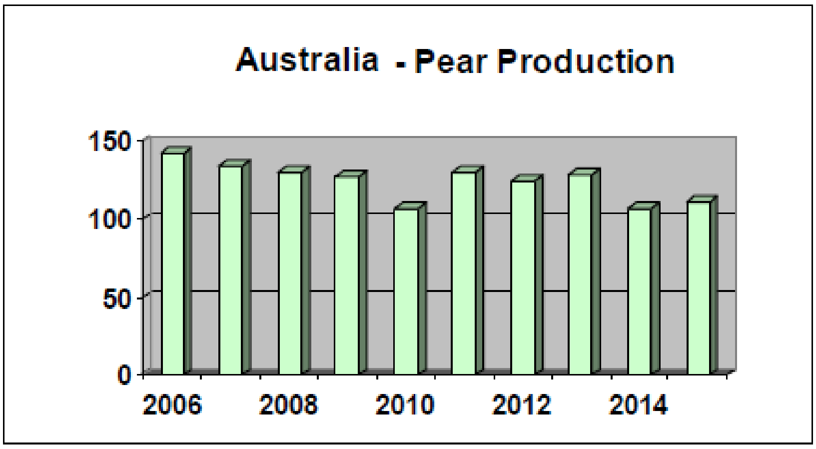
AUSTRALIA

Pear production

x 1000 tons

Variety	2007	2008	2009	2010	2011	2012	2013	2014	F2015	(1)	(2)
Beurre Bosc	10	9	9	9	9	8	9	9	10	6	9
Corella	1	2	2	2	3	3	3	3	5	48	57
Josephine	3	3	3	3	3	3	3	3	4	17	21
Nashi	3	3	3	3	3	3	3	3	3	0	3
Packham's	52	52	52	52	54	53	53	46	47	-12	-8
Red Anjou	0	0	0	0	0	0	1	0	0	-100	-100
Sensation	0	1	1	1	1	1	1	0	0	-100	-100
Williams BC	63	59	55	35	55	52	54	41	43	-20	-12
Other	2	2	2	2	2	2	2	2	1	-65	-63
Total Australia	**135**	**130**	**127**	**107**	**130**	**124**	**129**	**107**	**111**	**4**	**-12**

(1) Percentage difference between F2015 and 2014
(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014



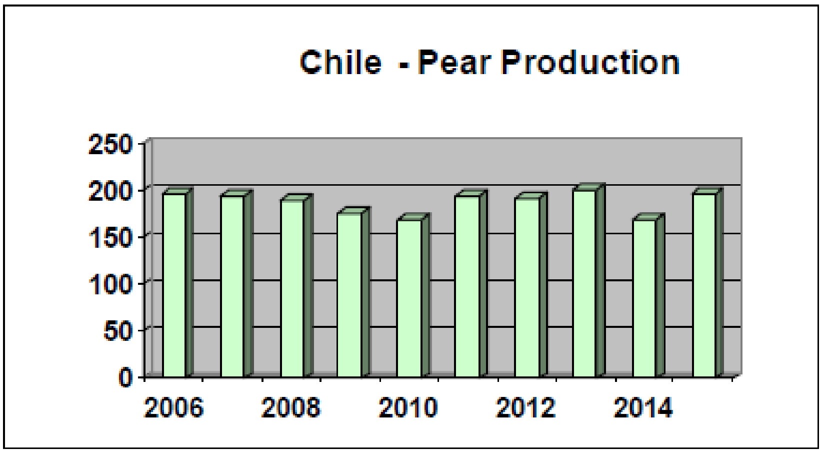
CHILE

Pear production

x 1000 tons

Variety	2007	2008	2009	2010	2011	2012	2013	2014	F2015	(1)	(2)
Abate Fetel	9	9	9	9	12	13	18	15	21	14	33
Beurre Bosc	17	16	15	15	17	13	10	8	7	-33	-36
Packham's	80	80	81	83	99	94	98	83	96	-2	4
Williams BC	30	30	27	19	19	21	20	17	20	-2	1
Winter Nelis	13	13	11	11	10	8	6	5	5	-19	-24
Other	45	42	33	33	38	42	49	41	48	0	10
Total Chile	**194**	**189**	**176**	**170**	**195**	**191**	**201**	**170**	**196**	**15**	**1**

(1) Percentage difference between F2015 and 2014
(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014



Pear market offer

MT	Market	2011	2012	2013	2014	F2015
Production		194.478	189.373	199.937	170.000	196.000
Market offer	Export	132.041	131.931	141.010	116.000	138.000
	Domestic	19.512	19.147	19.009	18.000	19.000
	Industry	42.926	38.295	39.918	36.000	39.000
	Total	194.478	189.373	199.937	170.000	196.000

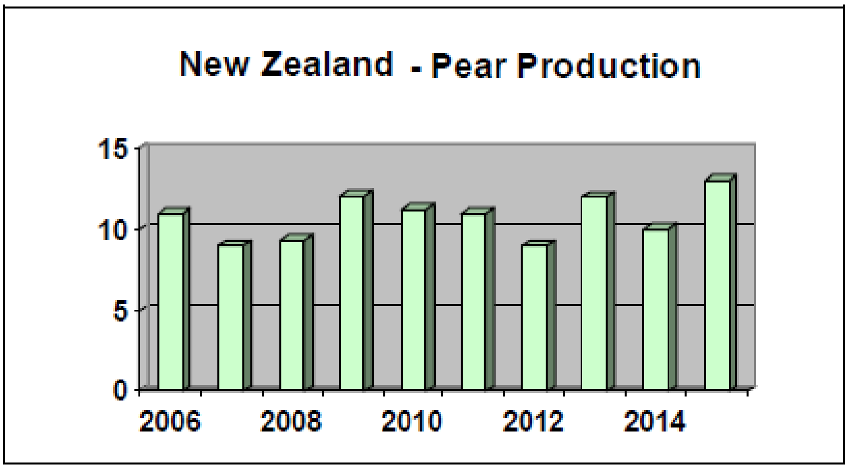
NEW ZEALAND

Pear production

x 1000 tons

Variety	2007	2008	2009	2010	2011	2012	2013	2014	F2015	(1)	(2)
Other	9	9	12	11	11	9	12	10	13	8	26
Total New Zeala	**9**	**9**	**12**	**11**	**11**	**9**	**12**	**10**	**13**	**30**	**30**

(1) Percentage difference between F2015 and 2014
(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014



Pear market offer

MT	Market	2011	2012	2013	2014	F2015
Production		**11.178**	**9.568**	**12.433**	**9.776**	**12.920**
Market offer	Export	4.297	3.868	4.719	4.972	5.015
	Domestic	2.000	2.000	3.495	2.648	2.880
	Industry	4.881	3.700	4.219	2.156	5.025
	Total	11.178	9.568	12.433	9.776	12.920

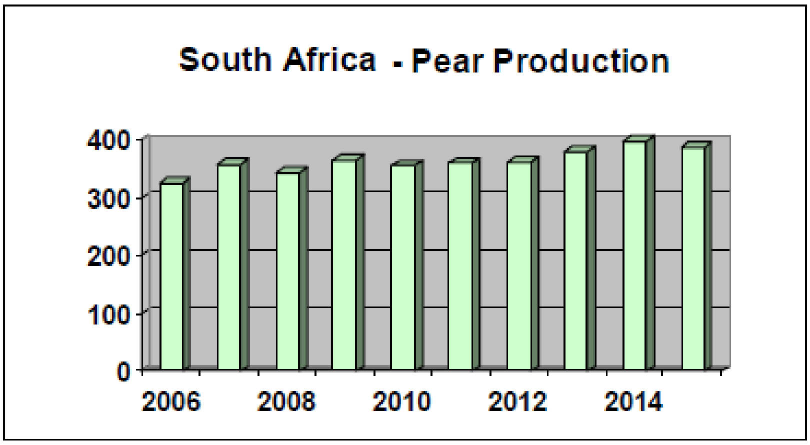
SOUTH AFRICA

Pear production

x 1000 tons

Variety	2007	2008	2009	2010	2011	2012	2013	2014	F2015	(1)	(2)
Beurre Bosc	13	11	12	10	10	11	11	12	8	-32	-32
Doyenne Du	8	8	9	8	8	7	8	8	8	2	2
Early Bon C	31	31	33	34	34	32	34	36	35	2	2
Forelle	78	84	90	90	91	94	99	104	101	2	2
Packham's	98	98	105	103	104	105	110	116	124	13	12
Rosemarie	12	11	12	12	12	11	11	12	15	36	36
Williams BC	83	62	66	61	61	56	59	62	50	-14	-14
Other	35	37	40	39	39	45	48	50	46	-2	-2
Total South Afric	**359**	**342**	**366**	**356**	**360**	**361**	**379**	**399**	**387**	**-3**	**5**

(1) Percentage difference between F2015 and 2014
(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014



Pear market offer

MT	Market	2011	2012	2013	2014	F2015
Production		359.851	360.854	379.242	398.744	386.782
Market offer	Export	176.646	177.848	197.912	203.660	197.495
	Domestic	67.379	52.322	49.324	49.817	50.315
	Industry	115.826	130.684	132.006	145.266	138.972
	Total	359.851	360.854	379.242	398.744	386.782

SOUTHERN HEMISPHERE
PEAR PRODUCTION BY COUNTRY

Pears

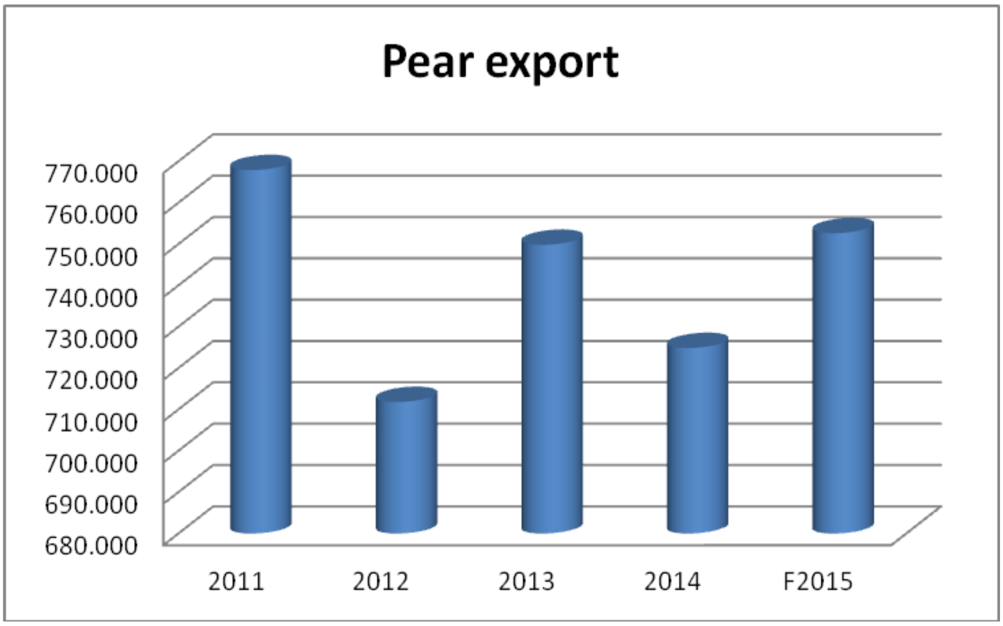
x 1000 tons

Country	2007	2008	2009	2010	2011	2012	2013	2014	F2015	(1)	(2)
Argentina	739	723	895	770	843	801	863	794	876	10	7
Australia	135	130	127	107	130	124	129	107	111	4	-7
Chile	194	189	176	170	195	191	201	170	196	15	5
New Zealand	9	9	12	11	11	9	12	10	13	30	26
South Africa	359	342	366	356	360	361	379	399	387	-3	2
Total	**1.436**	**1.393**	**1.577**	**1.414**	**1.539**	**1.486**	**1.583**	**1.479**	**1.583**	**7**	**4**

(1) Percentage difference between F2015 and 2014
(2) Percentage difference between F2015 and the average of 2012- 2013 - 2014

SOUTHERN HEMISPHERE
PEAR EXPORTS BY COUNTRY

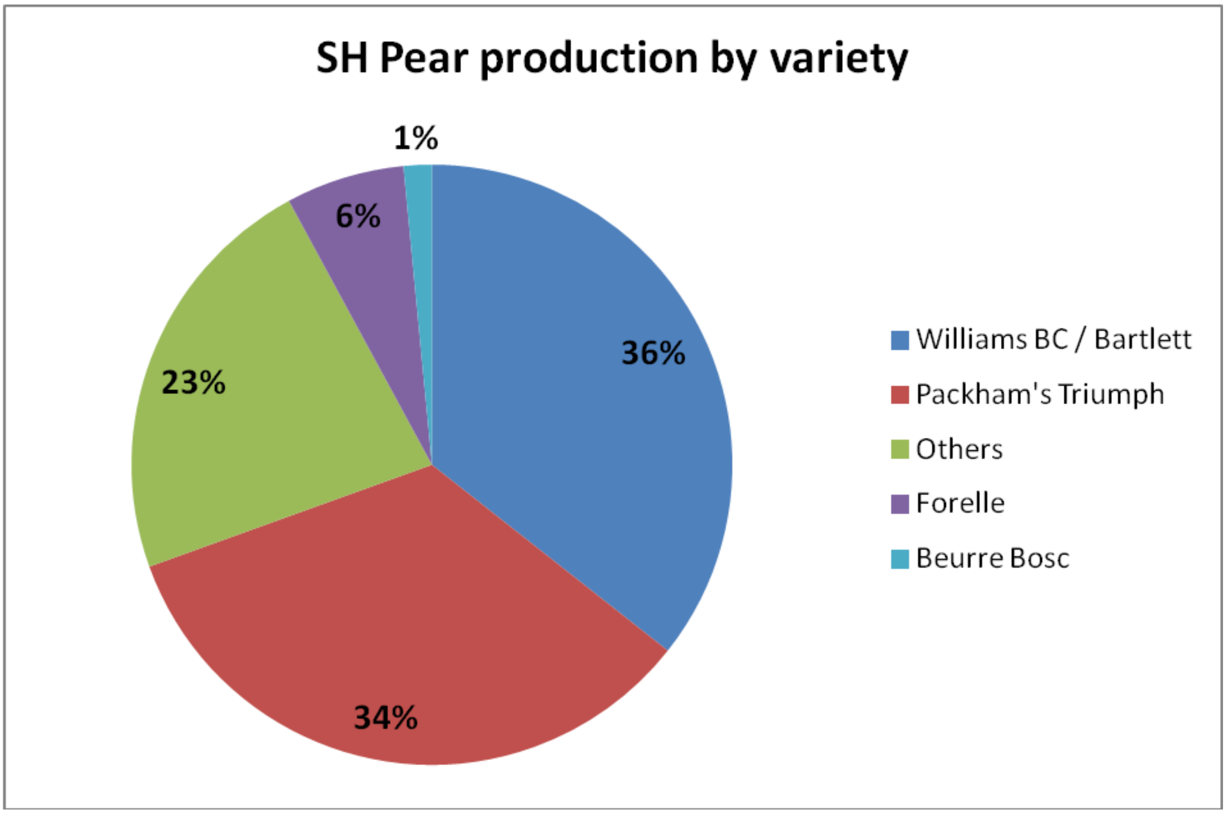
Country (MT)	2011	2012	2013	2014	F2015	-1	-2
Argentina	454.271	396.058	434.996	438.500	412.128	-6%	-3%
Chile	132.041	131.931	141.010	116.000	138.000	19%	6%
New Zealand	4.297	3.868	4.719	4.972	5.015	1%	11%
South Africa	176.673	177.848	197.912	197.495	197.495	0%	3%
TOTAL	**767.893**	**711.805**	**749.821**	**724.864**	**752.638**	**4%**	**3%**



SOUTHERN HEMISPHERE
PEAR PRODUCTION BY VARIETY

x 1000 tons

Variety	2007	2008	2009	2010	2011	2012	2013	2014	F2015	(1)	(2)
Beurre Bosc	40	35	36	34	36	32	30	29	24	-18	-22
Forelle	78	84	90	90	91	94	99	104	101	-3	2
Packham's T	487	480	528	488	518	499	507	510	536	5	6
Williams BC	494	454	526	429	560	523	580	494	564	14	6
Others	337	341	397	374	334	339	368	342	358	5	2
Total:	**1.436**	**1.393**	**1.577**	**1.414**	**1.539**	**1.486**	**1.583**	**1.479**	**1.583**	**7**	**4**



GENERAL COMMENTS

ARGENTINA

Notes on 2014 season

- The production will be slightly lower, however fruit packed will maintain in similar level than 2013, due to quality improvements
- The salaries agreements were closed in November
- Delay in national tax refunds, continues affecting the sector
- Initial change rate creates uncertainty

Notes on 2015 season

- Pending further news on the impact of heavy hail/ storm at the beginning of February.

AUSTRALIA

Notes on 2014 season

- Apples: The 2014 apple season saw a 6% decrease in total volume from 2013 season with some of the early varieties been impacted significantly by adverse events such as hail, frost, heat waves, bird and bat infestations in major growing regions. The result has been a below trend volume in 2013 at 274.7 thousand tonnes which saw growers enjoy good market returns.
- Pears: The 2014 pear season saw a drop in volume from previous year as Williams trees are replaced in favour of newer pear varieties.

Notes on 2015 season

- Apples: In contrast apple volumes for the 2015 season is predicted to be above average based on early estimates as calm weather and young trees come into fruition, fruit size is also expected to be above average from early estimates . The apple volume for 2015 is estimated to be at 311.2 thousand tonnes, with significant increases in Pink Lady and Royal Gala volumes been reported nationally in early seasons.
- Pears: In 2015 Packham pear trees are expected to carry full crop and Williams are expected to be carrying lighter crop than previous year. This will culminate in a larger crop in 2015 than 2014.

BRAZIL

Notes on 2014 season

- Very good winter, but blooming period with temperature under average, + rain during blooming and consequently lack of sun => distribution of the fruits is not even in the orchard, consequence pollination wasn't as good as it should be, orchards will produce under capacity. Apples are very clean, colour is appearing, some scab problem in some areas.

- Nearly no hail so far at this date 07/01/2014.
- Size of the fruits will be average in the 135. Next days will be very important for the final growth.
- Picking will be first week of February, a bit latter than last year.
    - Prospects for export: Exchange rate is far better than last year; as volume picked will be higher, interest is very strong. Sea freight will be very important for commercial decision.
- Costs continue to raise mainly labour force, far above inflation due to political will and shortage.
    - Costs are higher, labour force, energy and exchange rate has pushed inputs' prices.
- Internal market continue to be very strong, last season Gala and Fuji sold very well as quality was good.

Notes on 2015 season

- Average winter, irregular, climate during blooming was good to very good, good fruit set in Gala, in Fuji
- Under potential, good crop forecasted, apples are very clean, few russet, no scab, up to 16/01/2015
- Nearly no hail, some glomerela in warmer region. Color is very good
- Sizing will average 120
- Export don't look like a good exit this year, exchange rate is better than last year, but market in
- Europe is under stress
    - Asia and Middle East should increase volume
    - Russia is a question mark
- Costs continue to raise above inflation, labor force mainly as electricity and orchard inputs
    - Shortage of labor force is a challenge
- Internal market is good and should remain

CHILE

Notes on 2014 season

- Initial forecast does not foresee a significant impact of frosts in production or export volumes.
- Apples: sizes smaller than last year, picking time similar. Pears: sizes and picking time similar to last year.
- Labour issues that have affected the sector but are foreseen to be over.
- Evolution of the variety basket of Chilean fruit is not influencing the destination market.

Notes on 2015 season

- This season will be a challenging and competitive season for apples and pears from Chile.
- Estimated export volume of 800 thousand tons of apples and 138,000 tons of pears for this season 2015-2016
- Which in the case of apples is similar to the volumes exported last season, whilst for pears there is an expected 19% increase in volume.
- The season looks challenging and very competitive, especially for apples in the early part of the season, given various factors:
- There is an abundant local supply both in Europe and in USA of apples and pears, which is higher than in 2013 – 2014 season.
- The local supply of European apples and pears will be an important competition for apples and pears from Chile, since it is a cheaper than the imported alternative.
- The impact of the Russian Ban has meant that countries such as Poland, one of the largest suppliers of apples to Russia, has had to “relocate” their production in other markets, mostly within the EU which will stimulate a situation of oversupply.
- The positive aspect of this scenario is the positive exchange rate for Chile, which is fluctuating at approximately $ 600.
- As for the start of the harvest, the beginning of the harvest has been quite normal, slightly early in some locations.

NEW ZEALAND

Notes on 2014 season

- Off year on the biennial calendar
- Volume down on 2013, but improved export pack out
- Continuing growth in Asia

Notes on 2014/15 season

- Total production well up on 2014
- Season 7 to 10 days later than last year (last year was 10 days early)
- Relatively dry season
- Some hail pre-Christmas and in January. This will affect the export pack out.
- Similar to slightly smaller fruit size
- Exceptional eating quality

General

- As always, market access issues to deal with
- Impact of Russian embargo being monitored

SOUTH AFRICA

Notes on 2014 season

- Total productions increased with 6% compared to 2013 volumes.
    - (1.61 mill tons vs 1.53 mill tons)
    - Pome fruit: Apples (+12%); Pears (+5%)
    - Stone fruit: Apricots (-9%); Peaches & Nect (-4%); Plums (+22%).
- Record export crop on pears and peaches. Decline in apple, apricot and exports.
- Total export volume decreased with 13% compared to 2013:
    - Apples (-22%); Pears (+3%); Apricots (-13%); Peaches (+14%); Nectarines (-6%); Plums (-7%)
    - Domestic volumes decreased by 3.5% Y-O-Y
    - In general season was late, good quality crop, stong local market for nectarines in particular. Hail in two major production regions affecting mostly apples and plums.
    - Rate of stone fruit plantings (except plums) slowed down, pome fruit plantings increased.
    - Total pome & stone area 52 508 (+0.01% Y-O-Y):
- Apples (+2%); Pears (+2.9%); Apricots (-6%); Peaches (-1%); Nectarines (+5%); Plums (+2%)

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