SADJARSKI POSVET 2022

POVEZANI
RASTEMO
HITREJE
2022

60. MEDNARODNI
KMETIJSKO-ŽIVILSKI SEJEM AGRA
20. - 25. avgust 2022
Gornja Radgona

Gospodarska zbornica Slovenije

Zbornica kmetijskih in živilskih podjetij

PROGRAM

9.00 – 9.15	**Uvodni pozdrav direktorja Direktorata za kmetijstvo, MKGP** (*Branko Ravnik*)
9.15 – 9. 45	**Stanje in napoved pridelka jabolk in hrušk v letu 2022** (*Dr. Vesna Miličić, sekretarka Združenja za sadjarstvo pri GZS Zbornici kmetijskih in živilskih podjetij*)
9.45 – 10.45	**Okrogla miza: *„Prihodnost slovenskega sadjarstva – ali bomo sploh lahko še pridelovali sadje?“***
10.45 – 11. 00	**Razprava in zaključek dogodka**
po 11.00	**Druženje na razstavnem prostoru GZS-ZKŽP v hali A**

Ves čas trajanja sejma bo na razstavnem prostoru GZS-ZKŽP v hali A potekala razstava sezonskega slovenskega sadja.

Branko Ravnik

Direktor

Direktorat za kmetijstvo
Ministrstvo za kmetijstvo, gozdarstvo in prehrano

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Stanje in napoved pridelka jabolk in hrušk v letu 2022

Dr. Vesna Miličić, sekretarka Združenja za sadjarstvo pri GZS ZKŽP

POVEZANI RASTEMO HITREJE 2022

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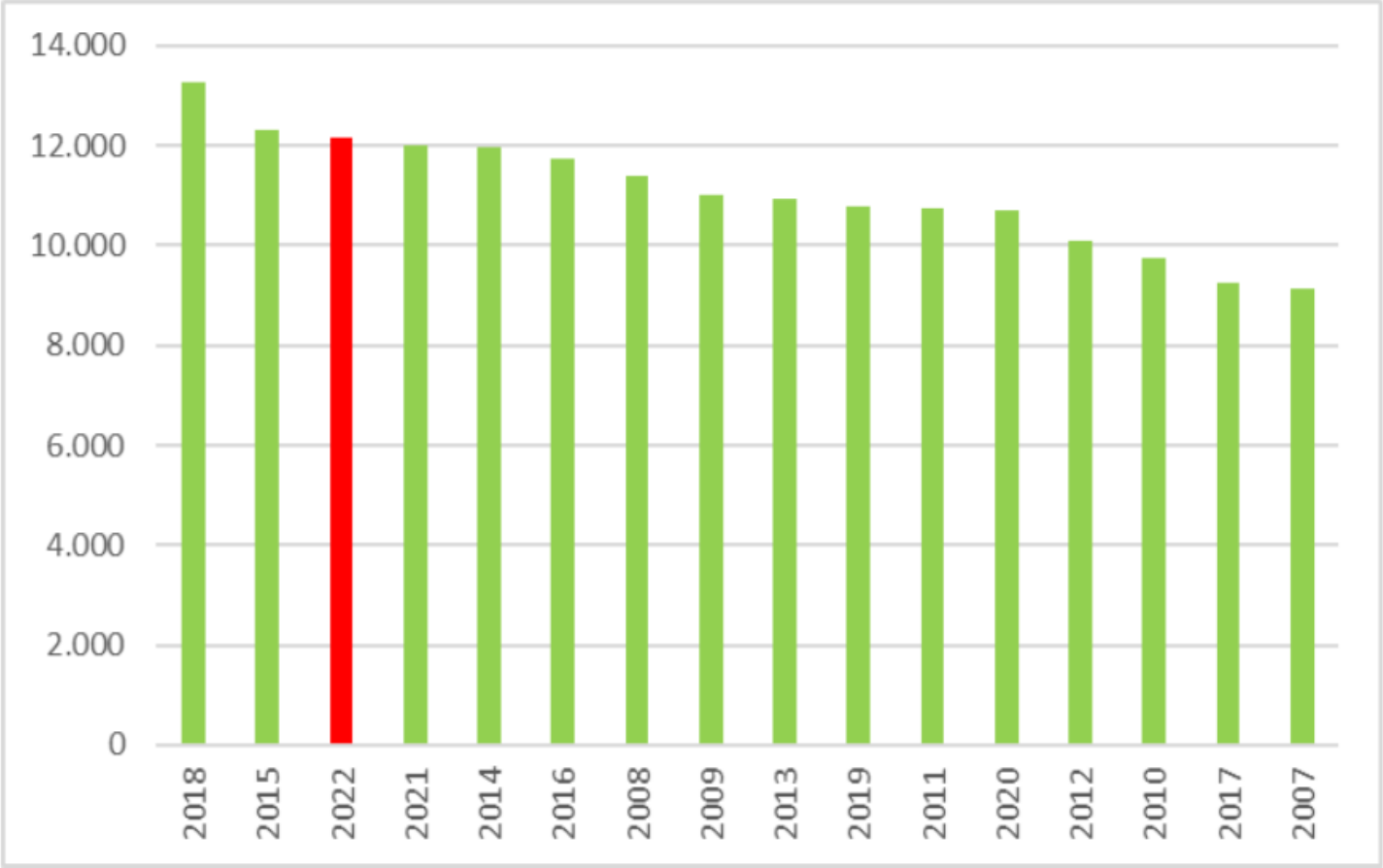
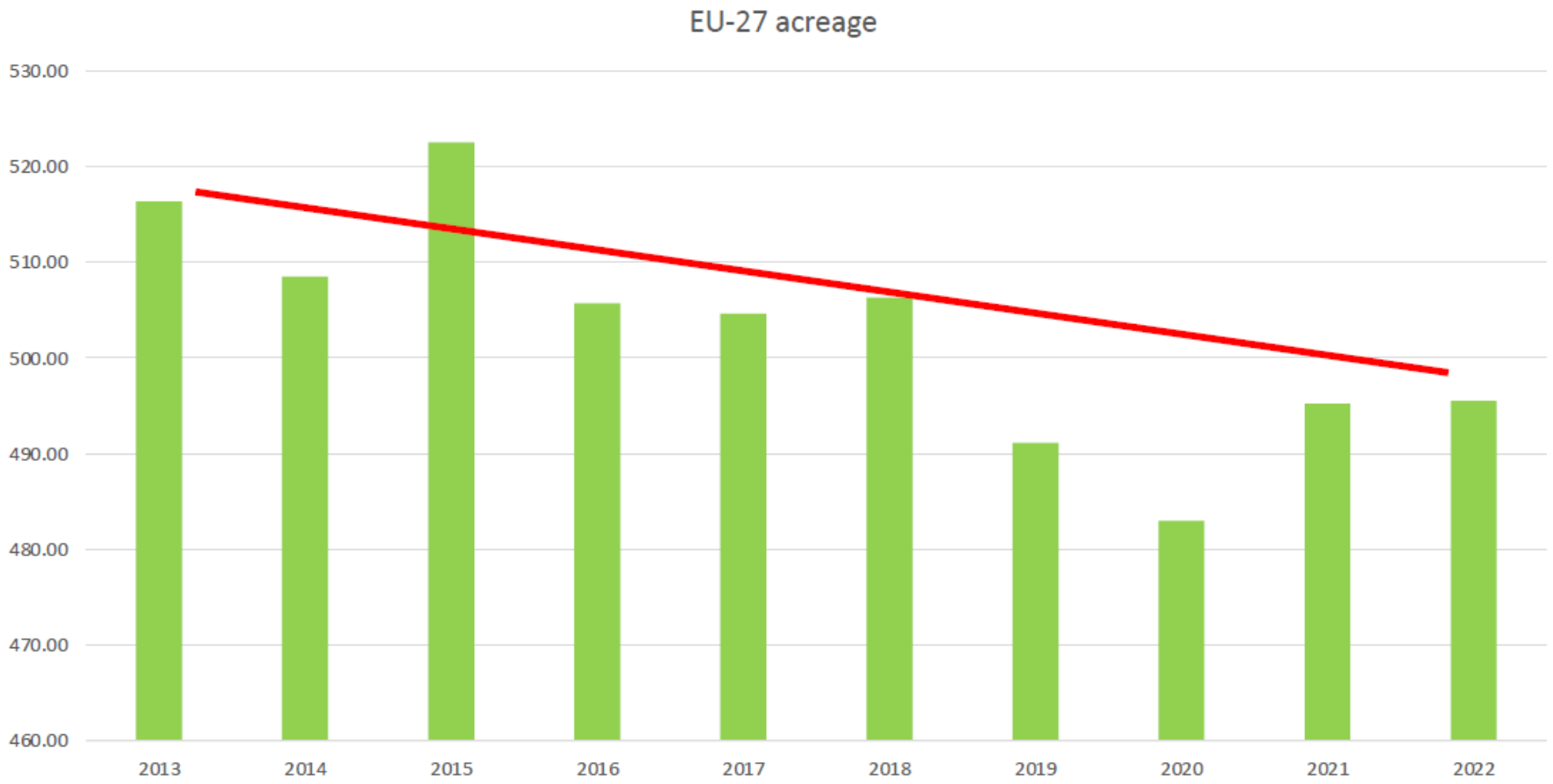
Napoved pridelka jabolk v letu 2022

12,168,000 T

APPLES EU	2020	2021	2022	VAR in %	VAR in T
AUSTRIA	126	120	148	23%	28
BELGIUM	168	250	219	-12%	-31
CROATIA	55	65	57	-12%	-8
CZECH REPUBLIC	118	110	127	15%	17
DENMARK	24	18	24	33%	6
FRANCE	1.337	1.383	1.468	6%	85
GERMANY	1.023	1.005	1.067	6%	62
GREECE	280	246	294	20%	48
HUNGARY	350	520	350	-33%	-170
ITALY	2.124	2.053	2.150	5%	97
LATVIA	14	8	8	0%	0
LITHUANIA	60	32	25	-22%	-7
NETHERLANDS	220	243	245	1%	2
POLAND	3.410	4.300	4.495	5%	195
PORTUGAL	278	368	294	-20%	-74
ROMANIA	384	444	410	-8%	-34
SLOVAKIA	30	31	34	10%	3
SLOVENIA	46	44	47	7%	3
SPAIN	425	563	431	-23%	-132
SWEDEN	31	27	30	11%	3
UK	196	186	245	32%	59
TOTAL	**10.699**	**12.016**	**12.168**	**1%**	**152**



Napoved obsega površin pod jablano v letu 2022

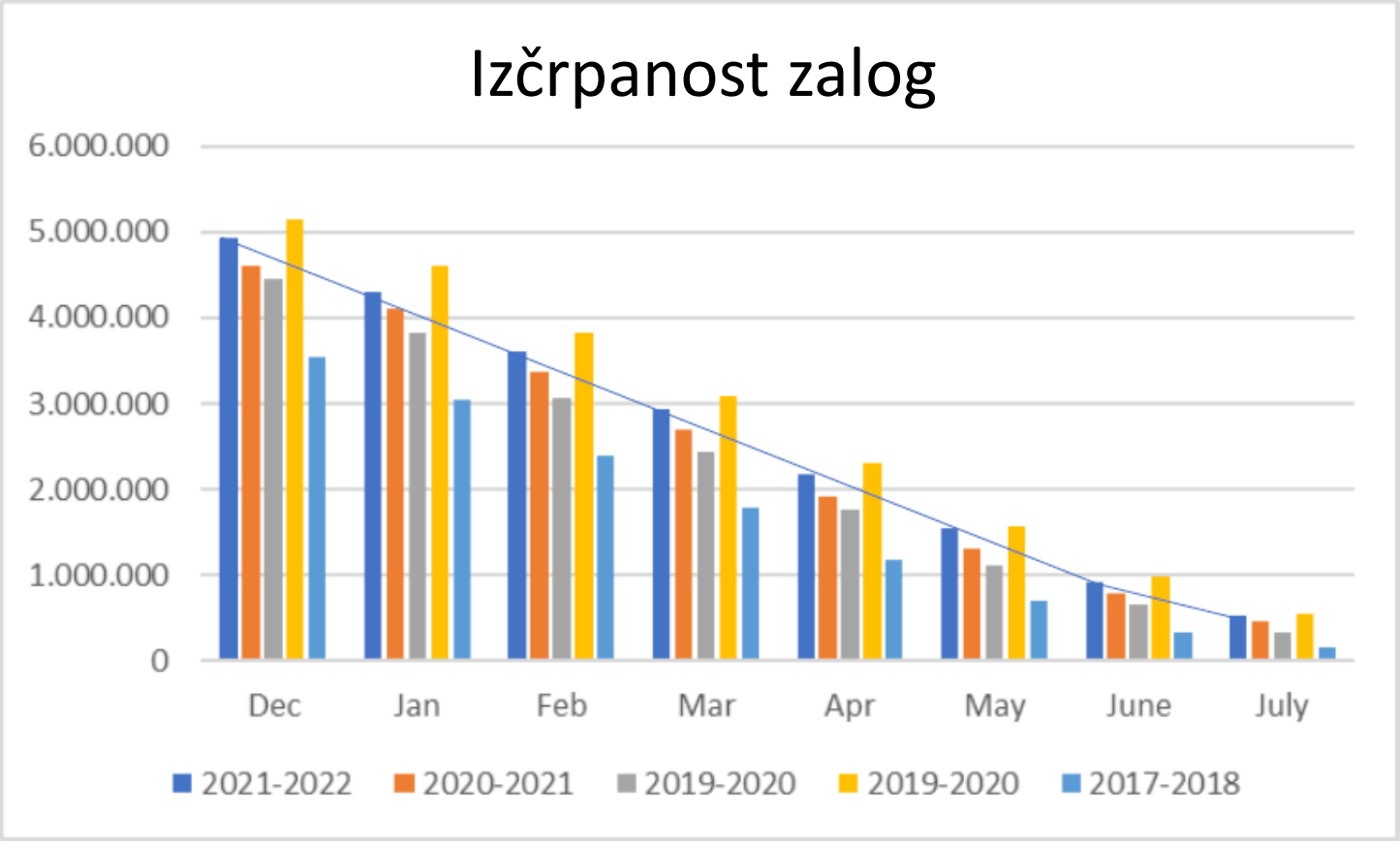


EU AVERAGE YIELD	2013	2014	2015	2016	2017	2018	2019	2020	2021
EU 27 T/HA	22,67	24,83	23,55	23,95	19,01	26,34	23,59	24,45	24,82

in 000 HA	2022
EU 27	495,52
Poland	159,40
France	54,69
Italy	54,52
Romania	53,82
Germany	33,98
Spain	29,45
Hungary	25,97
Greece	14,39
Portugal	13,92
Lithuania	10,20
Czechia	7,11
Austria	6,18
Netherlands	5,97
Belgium	5,35
Croatia	4,39
Bulgaria	3,80
Latvia	3,20
Slovenia	2,09
Slovakia	1,64
Sweden	1,48
Denmark	1,40
Estonia	0,73
Ireland	0,71
Finland	0,66
Cyprus	0,36
Luxembourg	0,10

Share EU apples orchards	
Poland	32%
France	11%
Italy	11%
Romania	11%
Germany	7%
Spain	6%
Hungary	5%
Greece	3%
Portugal	3%
Lithuania	2%
Czechia	1%
Austria	1%
Netherland	1%
Belgium	1%
Other MS	4%

Podatki o zalogah jabolk v hladilnicah



Sales of 600,000T to 700,000 T/month in the peak of the season

<u>1st July still > 500.300 T in stocks:</u>

Italy (150 K), Poland (94 K), France (82 k), Spain (56 K)
Germany (48 K), Belgium (40 K)

Golden (217 K), Jonagold (64 K), Idared (51 K) Red Jonaprince (41 K)

Impact on stock depletion of the withdrawal package in Poland covering almost 180,000 T (budget of 12 Mio € =>ca 6 cts /kg)

Napoved obsega pridelave po sortah v letu 2022

Going up long term

Red Jonaprince +366% to 581 K T

Pinova +89% to 194 K T

Gala +22 % to 1.614 K T

Crispps pink +22 % to 311 K T

Main varieties in 000 T	2015	2016	2017	2018	2019	2020	2021	2022	VAR YAGO	AV 15-17	VAR % 22/ AV 15-17
Golden	2.534	2.406	1.911	2.403	2.261	1.967	2.168	2.064	-104	2.284	-10%
Gala	1.382	1.304	1.271	1.467	1.439	1.443	1.585	1.614	29	1.319	22%
Red Delicious	643	632	558	737	678	660	677	697	20	611	14%
Idared	1.129	965	629	1.177	592	626	729	659	-70	908	-27%
Red Jonaprince	104	156	114	371	407	441	470	581	111	125	366%
Shampion	513	522	416	569	413	423	465	456	-9	484	-6%
Jonagold	633	567	298	577	391	312	466	426	-40	499	-15%
Granny	405	384	363	393	372	365	347	373	26	384	-3%
Elstar	399	387	265	357	363	312	333	364	31	350	4%
Cripps Pink/Pink Lady	244	261	260	275	289	273	256	311	55	255	22%
Fuji	338	288	290	332	339	313	306	309	3	305	1%
Ligol	303	330	250	350	150	210	280	260	-20	294	-12%
Braeburn	327	318	220	312	286	251	237	250	13	288	-13%
Jonagored	519	539	335	563	246	250	250	230	-20	464	-50%
Pinova/Morgana	119	104	85	155	151	140	161	194	33	103	89%
Gloster	183	197	166	190	145	154	201	141	-60	182	-23%

Gala 1.614 K T
+ 29 K T to YAGO

Golden 1.319 K T
- 104 K T to YAGO

Red 697 K T
+ 20 K T to YAGO

Going down long term

Jonagored -50 % to 230 K T

Idared - 27 % to 259 K T

Gloster - 23 % to 141 K T

Braeburn - 13 % to 25 0K T

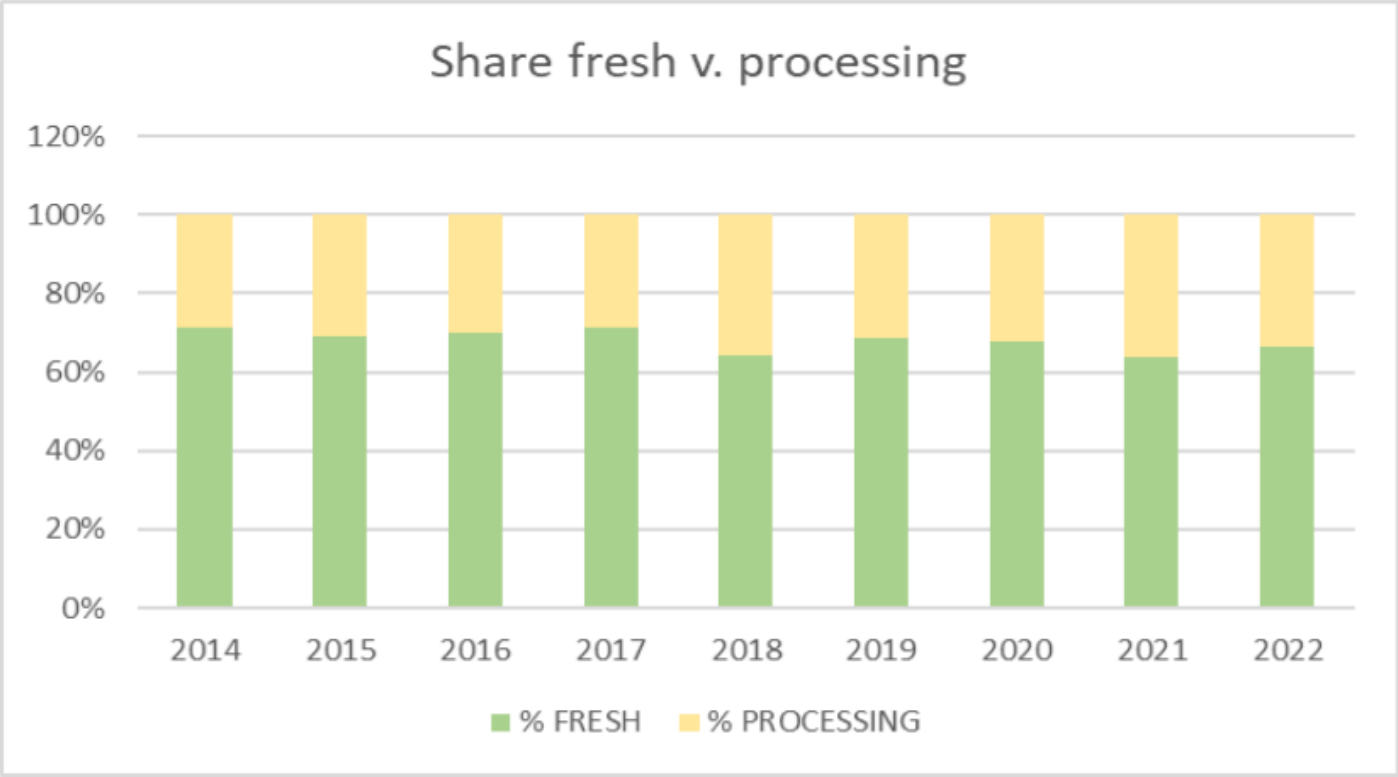
Napoved obsega pridelave po klubskih sortah v letu 2022

Club varities in 000 T	2017	2018	2019	2020	2021	2022	2025
Pink Lady	178	171	157	205	173	190	270
Kanzi	60	65	70	72	70	75	80
Jazz	32	35	37	40	48	48	50
Ambrosia	17	21	22	24	27	35	45
Envy	3,2	6,4	13,5	15	17	24	36
Honey Crunch	15	15	17	12	12	20	25
Juliet	9,5	11,5	12	14	15	17	25
Junami	20	16	20	12,5	14	13,5	60
Evelina	15	13	15	15	15	15,5	16
Joya /Crispps Red	6,7	6,15	6,6	7	7,5	7,9	25
Greenstar	4	7	4	4	4	4	4
Cameo		4	6	8	10	12	15
Morgana				1,5	2,6	3	8

Napoved obsega *predelave* jabolk v letu 2022

PROCESSING IN T					
in 000 T	2018	2019	2020	2021	2022
AUSTRIA	25,20	43,80	37,80	36,00	44,40
BELGIUM	92,40	48,40	25,20	107,50	43,80
CROATIA	34,40	18,00	11,00	15,60	11,40
CZECH REPUBL	72,50	51,50	64,90	60,50	63,50
DENMARK	6,00	3,75	6,00	0,30	0,30
FRANCE	295,40	330,20	227,29	262,77	264,24
GERMANY	306,04	317,12	306,90	251,25	245,41
GREECE	60,20	69,00	70,00	61,50	73,50
HUNGARY	547,40	339,00	245,00	364,00	227,50
ITALY	316,96	377,28	254,88	256,63	290,25
LATVIA	5,60	5,00	7,00	4,00	4,00
LITHUANIA	17,36	7,80	15,00	8,00	6,25
NETHERLANDS	26,70	40,80	28,60	30,38	30,63
POLAND	2.645,50	1.455,00	1.875,50	2.580,00	2.697,00
PORTUGAL	13,35	16,35	13,90	18,40	14,70
ROMANIA	148,75	114,45	130,56	128,76	127,10
SLOVAKIA	0,44	0,35	0,30	0,31	0,34
SLOVENIA	15,84	7,92	9,20	22,00	18,80
SPAIN	95,20	111,00	85,00	112,60	86,20
SWEDEN	0,32	0,20	0,31	0,27	0,30
UK	32,85	43,05	39,20	37,20	49,00
TOTAL	**4.758**	**3.400**	**3.454**	**4.358**	**4.299**

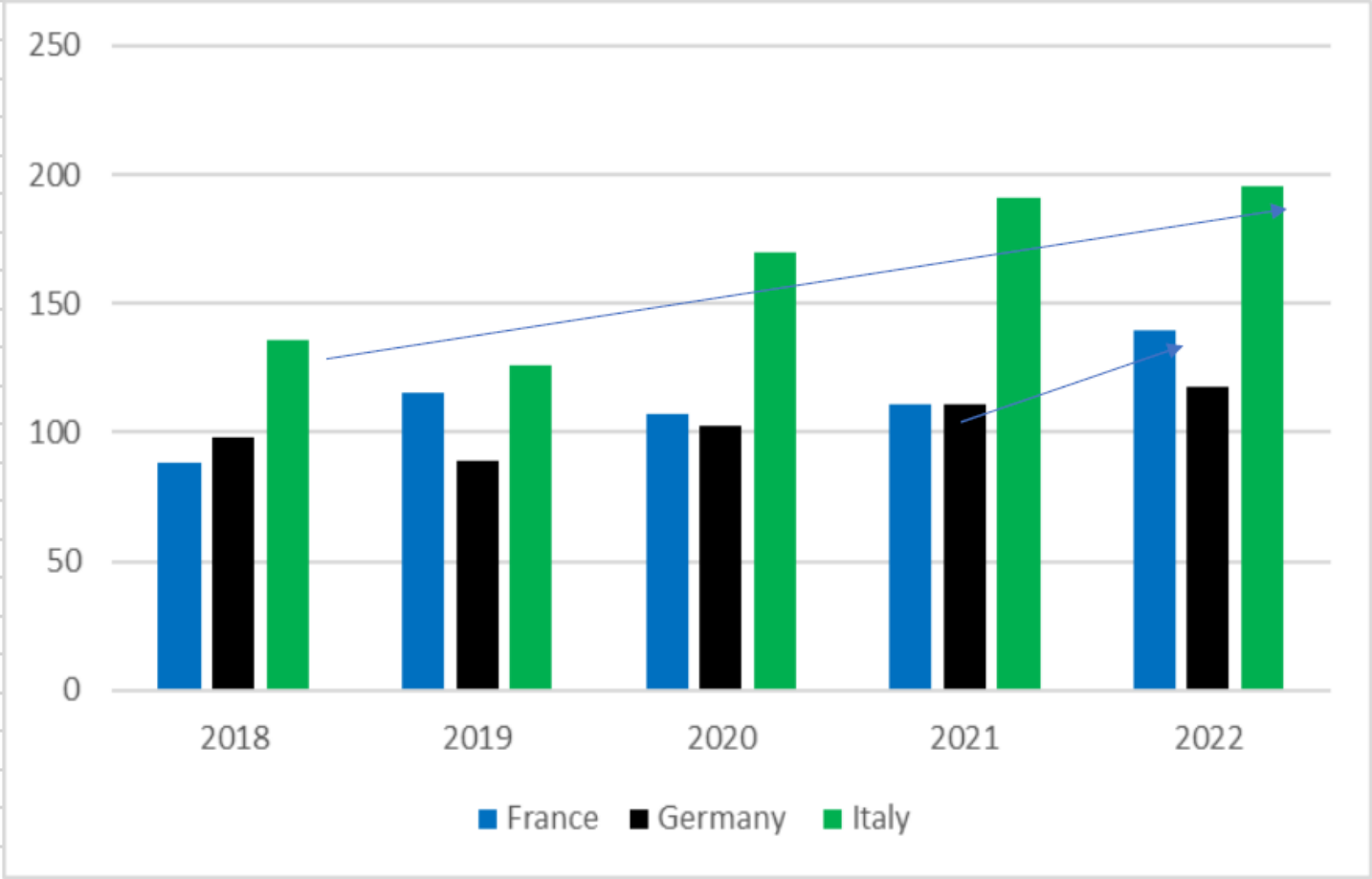
VOL IN 000 T	2014	2015	2016	2017	2018	2019	2020	2021	2022
PRODUCTION	11.974	12.325	11.747	9.251	13.275	10.783	10.705	12.016	12.168
PROCESSING	3.431	3.820	3.536	2.652	4.758	3.400	3.454	4.358	4.298
FRSH	8.543	8.505	8.211	6.599	8.517	7.383	7.251	7.658	7.870
% FRESH	71%	69%	70%	71%	64%	68%	68%	64%	65%
% PROCESSING	29%	31%	30%	29%	36%	32%	32%	36%	35%



=> 436,000 T to sell on fresh market!

Napoved ekološke pridelave jabolk v letu 2022

ORGANIC PRODUCTION IN T					
2018	2019	2020	2021	2022	
13	25	21	24	33	
6	10	7	10	9	
3	3	1	1	1	
3	3	4	2	3	
2	1	2	1	2	
89	116	107	111	139	
98	89	102	111	117	
6	6	7	7	12	
16	14	25	47	32	
136	126	170	191	196	
4	3	4	2	2	
1	1	1	0	0	
16	16	13	10	10	
48	29	34	43	45	
13	16	14	18	15	
43	26	19	13	12	
1	1	1	1	1	
6	3	3	3	3	
19	22	17	23	17	
3	2	2	2	2	
7	6	6	6	7	
531	516	560	626	658	Market in 000 T
4,03%	4,79%	5,23%	5,21%	5,41%	Market %
	-15	44	66	32	Yearly growth in 000 T



Is growth of production sustain by a growth of demand ??

Napoved pridelka jabolk v letu 2022: Srbija, Moldavija, Rusija, Ukrajina, Turčija

APPLES NEIGHBORHOOD	2020	2021	2022	VAR in %	VAR in T
SERBIA	506	515	453	-12%	-62
MOLDOVA	480	665	485	-27%	-180
RUSSIA	1.200	1.400	1.300	-7%	-100
UKRAINE	1.115	1.279	1.157	-10%	-122
TURKEY	4.000	4.402	4.660	6%	258
TOTAL NEIGHBORHOOD	**7.301**	**8.261**	**8.055**	**-3%**	**-206**

Other Western Balkans in 000 T	
Albania	111
North Macedonia	105
Boznia Herzegovina	100
Kosovo	40
Total	**356**

Napoved pridelka jabolk v letu 2022: Kitajska, Indija, ZDA, Mehika

APPLES OTHER NH	2020	2021	2022	VAR in %	VAR in T
CHINA	44.060	44.940	36.000	-20%	-8.940
INDIA	2.074	2.200	2.650	20%	450
USA	4.925	4.718	4.510	-4%	-208
MEXICO	815	808	820	1%	12
TOTAL OTHER NH	51.874	52.666	43.980	-18%	-8.686

India in 000T	2017	2018	2019	2020	2021	2022
Himachal Pradesh	446	368	715	407	700	750
Kashmir & Jammu	1.644	1.645	1.648	1.667	1.500	1.725
Uttarakhand						75
Arunachal Peadesh						10
Total	2.090	2.013	2.363	2.074	2.200	2.475

USA, by major apple producing state (US Apple Estimate)

x 1000 tons

State	2017	2018	2019	2020	2021	F2022	-1	-2
New York	544	633	550	628	606	614	1%	3%
Pennsylvania	222	221	200	189	252	209	-17%	-2%
Virginia	100	93	100	74	74	93	25%	13%
Michigan	363	476	500	420	297	551	86%	36%
Washington	3,039	3,039	3,449	3,137	3,058	2,613	-15%	-19%
California	104	113	112	123	98	105	7%	-6%
Oregon	79	77	100	79	70	70	0%	-16%
Other States	285	288	297	275	264	257	-3%	-8%
Total*	4,736	4,940	5,308	4,926	4,719	4,511	-4%	-10%

(1) Percentage difference between F2022 and 2021
(2) Percentage difference between F2022 and the average of 2021 - 2020 - 2019

China, by province (CFNA)

x 1000 tons

Province	2019	2020*	2021	F2022	(1)	(2)
Shaanxi	11,356,000	11,852,100	12,444,705	11,200,235	-10%	-6%
Shandong	9,502,000	9,536,300	8,582,670	6,866,136	-20%	-25%
Shanxi	4,219,000	4,366,300	4,453,626	2,672,176	-40%	-39%
Henan	4,088,000	4,075,700	4,157,214	2,494,328	-40%	-39%
Gansu	3,045,000	3,859,800	3,666,810	2,566,767	-30%	-27%
Liaoning	2,488,000	2,673,200	2,114,800	1,480,360	-30%	-39%
Hebei	2,216,000	2,397,500	2,277,625	2,049,863	-10%	-11%
Xinjiang	1,707,000	1,840,200	1,895,406	1,705,865	-10%	-6%
Sichuang	765,000	807,500	815,575	840,042	3%	6%
Yunnan	550,000	605,800	617,916	636,453	3%	8%
Jiangsu	540,000	560,600	571,812	577,530	1%	4%
Other	1,949,000	1,491,000	4,375,241	2,999,364	-31%	15%
Total	42,425,000	44,066,100	45,973,400	36,089,119	-22%	-20%

Napoved pridelka jabolk v letu 2022: države južne poloble

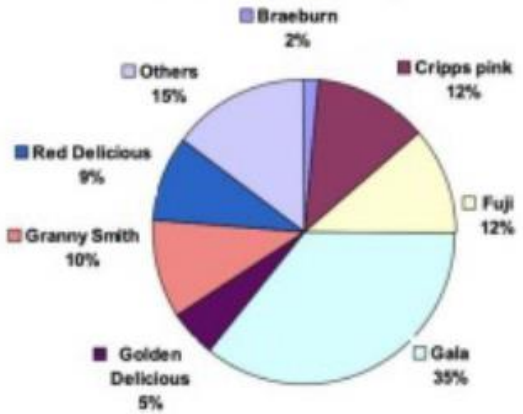
Apple Production by country

x 1000 tons

Country	2013	2014	2015	2016	2017	2018	2019	2020	2021	F2022	(1)	(2)
Argentina	776	744	760	774	545	557	550	578	502	445	-11	-18
Australia	289	275	309	301	306	292	288	263	321	311	-3	7
Brazil	1.063	1.165	1.145	826	1.329	1.094	1.101	939	1.277	900	-30	-19
Chile	1.746	1.670	1.708	1.635	1.675	1.761	1.665	1.515	1.485	1.455	-2	-6
New Zealand	550	478	554	539	506	576	554	575	515	590	15	8
South Africa	907	794	924	902	940	884	878	991	1.117	1.163	4	17
Total	5.331	5.126	5.400	4.977	5.300	5.165	5.035	4.861	5.217	4.864	-7	-3

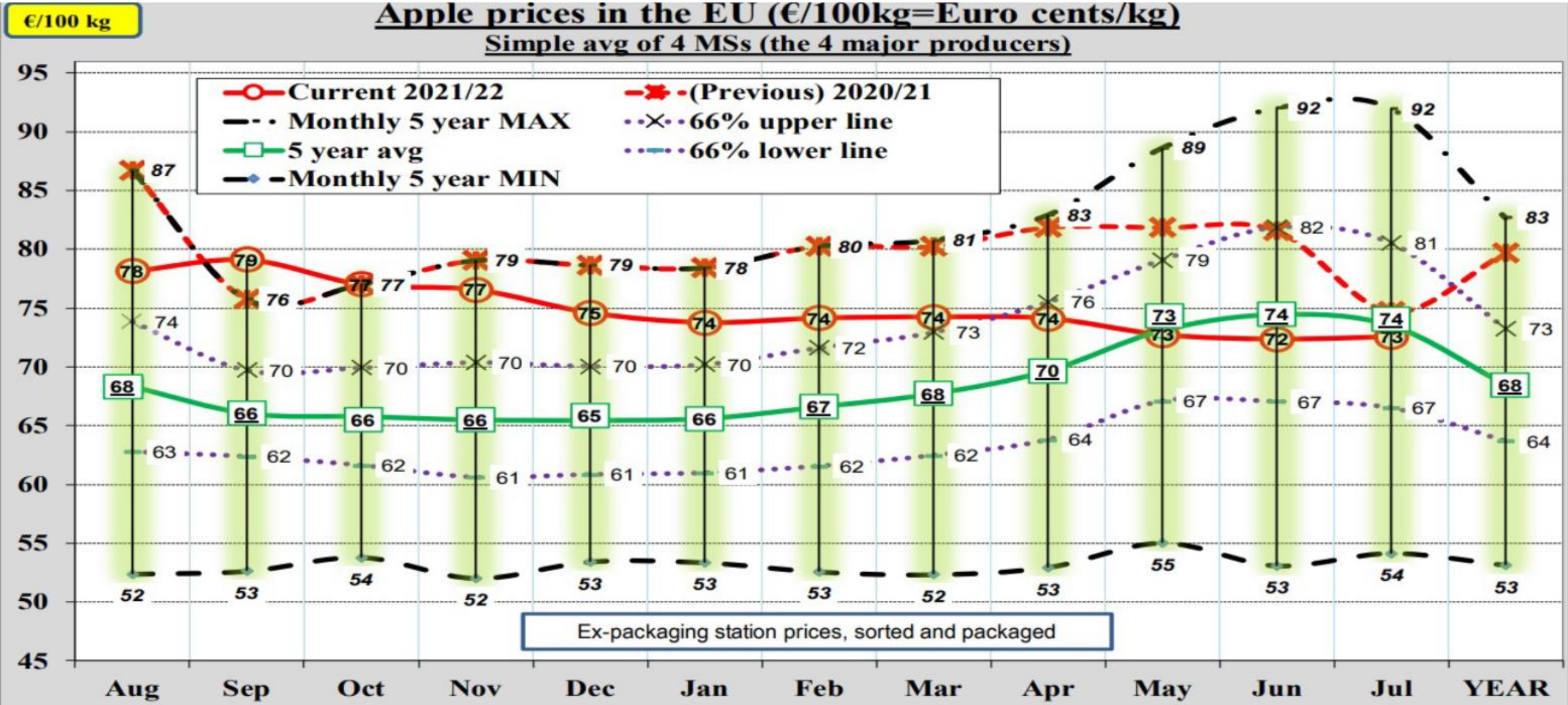
(1) Percentage difference between F2022 and 2021
(2) Percentage difference between F2022 and the average of 2021 - 2020 - 2019

Apple Production by variety



Southern Hemisphere season to EU 27		
in 000 T	2021	2022
Argentina	11.513	7.928
Australia	517	399
Brasil	14.792	5.065
Chile	109.935	102.181
New Zealand	51.897	40.250
South Africa	36.197	39.068
TOTAL	224.851	194.891

Cene jabolk v EU (€/100 kg)



Cene jabolk po posameznih državah EU (€/100 kg)

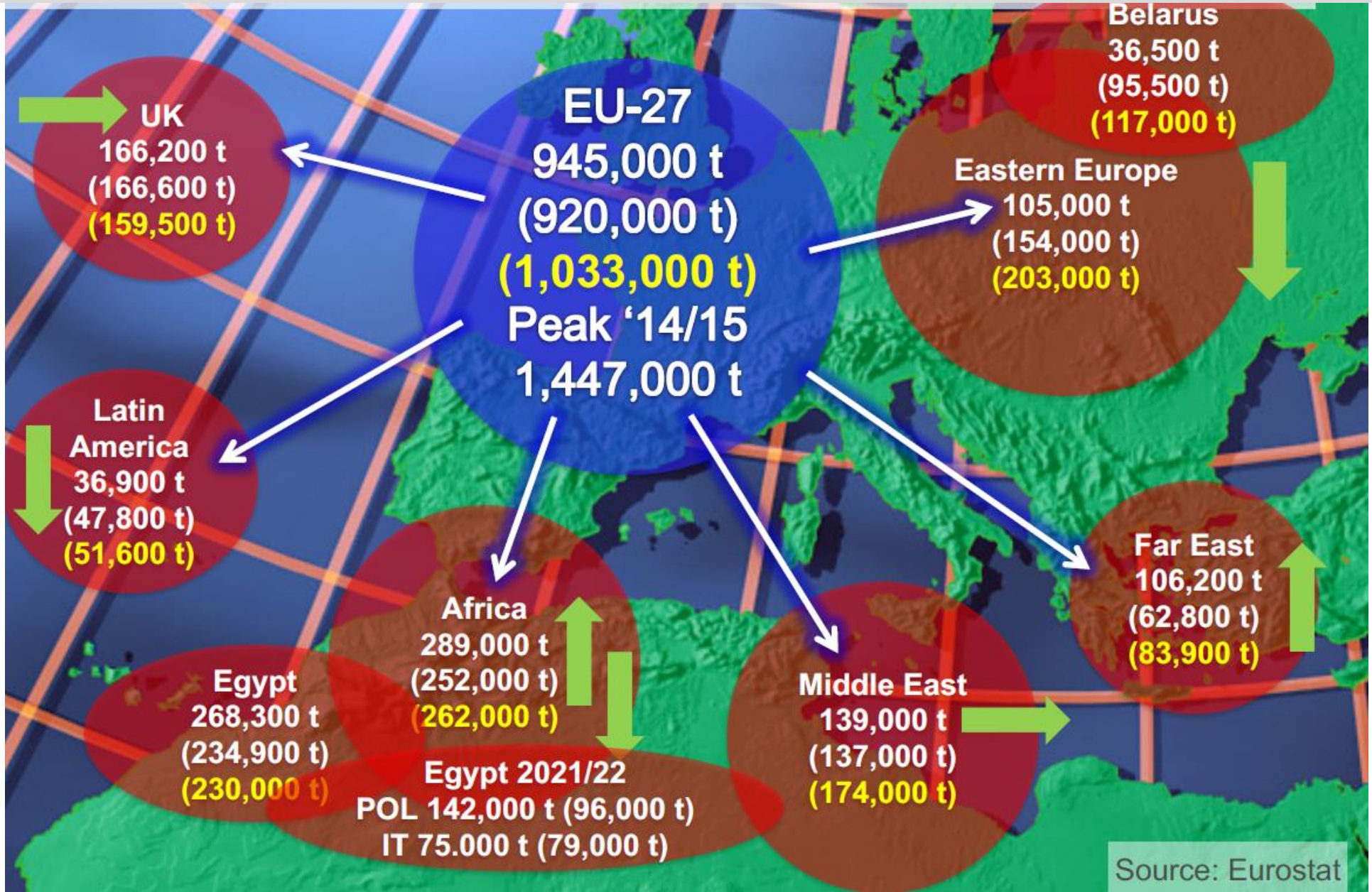
	2021					2022						
	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul (*)
Nemčija	62,05	64,75	66,85	67,38	68,94	64,45	64,27	63,31	62,22	57,10	55,31	56,92
Avstrija	87,87	94,17	102,91	100,60	119,08	117,92	104,89	120,61	108,61	96,27	100,66	101,95
Belgija	62,21	67,07	50,62	43,23	42,03	47,07	42,75	39,23	42,20	34,42	32,97	40,13
Hrvaška	74,36	68,21	67,64	74,58	71,23	68,81	70,01	69,59	70,84	65,94	71,73	74,11
Španija	85,08	82,13	84,75	80,04	74,67	74,66	75,90	73,66	75,47	80,72	81,52	80,50
Francija	149,49	133,81	132,07	126,77	123,01	117,06	118,17	117,09	113,71	112,59	110,78	114,60
Grčija	101,70	98,70	92,52	92,46	91,93	94,50	94,50	95,70	97,88	97,88	97,88	104,96
Madžarska	64,54	63,75	64,12	63,42	64,80	66,21	66,24	66,27	70,22	70,54	70,88	n.a.
Italija	79,72	83,17	82,58	84,58	82,65	81,71	81,12	79,83	79,31	78,90	78,09	75,37
Nizozemska	116,43	74,62	61,30	52,77	54,86	56,86	57,66	59,78	55,70	57,88	56,77	58,95
Poljska	21,34	34,80	26,59	27,56	24,32	31,85	33,03	36,75	41,26	42,30	45,22	43,32
Portugalska	107,35	79,55	76,47	73,90	72,03	71,99	73,91	71,53	70,16	71,23	73,10	82,02
Češka Republika	69,25	66,37	64,49	62,91	61,22	60,67	60,35	61,38	63,81	64,28	64,64	66,17
Romunija	*44,32*	44,12	30,78	36,37	46,70	49,41	51,14	50,97	52,18	49,52	n.a.	n.a.

Pogled nazaj: izzivi na področju izvoza jabolk

- Rising costs and logistics delays /lack of availability
- Post COVID: additional controls and preference for « local »
- Belarus temporary embargo
- Transit to East complex due to war in Ukraine
- Egypt documentary credit under CBE control
- On-going SPS restrictions

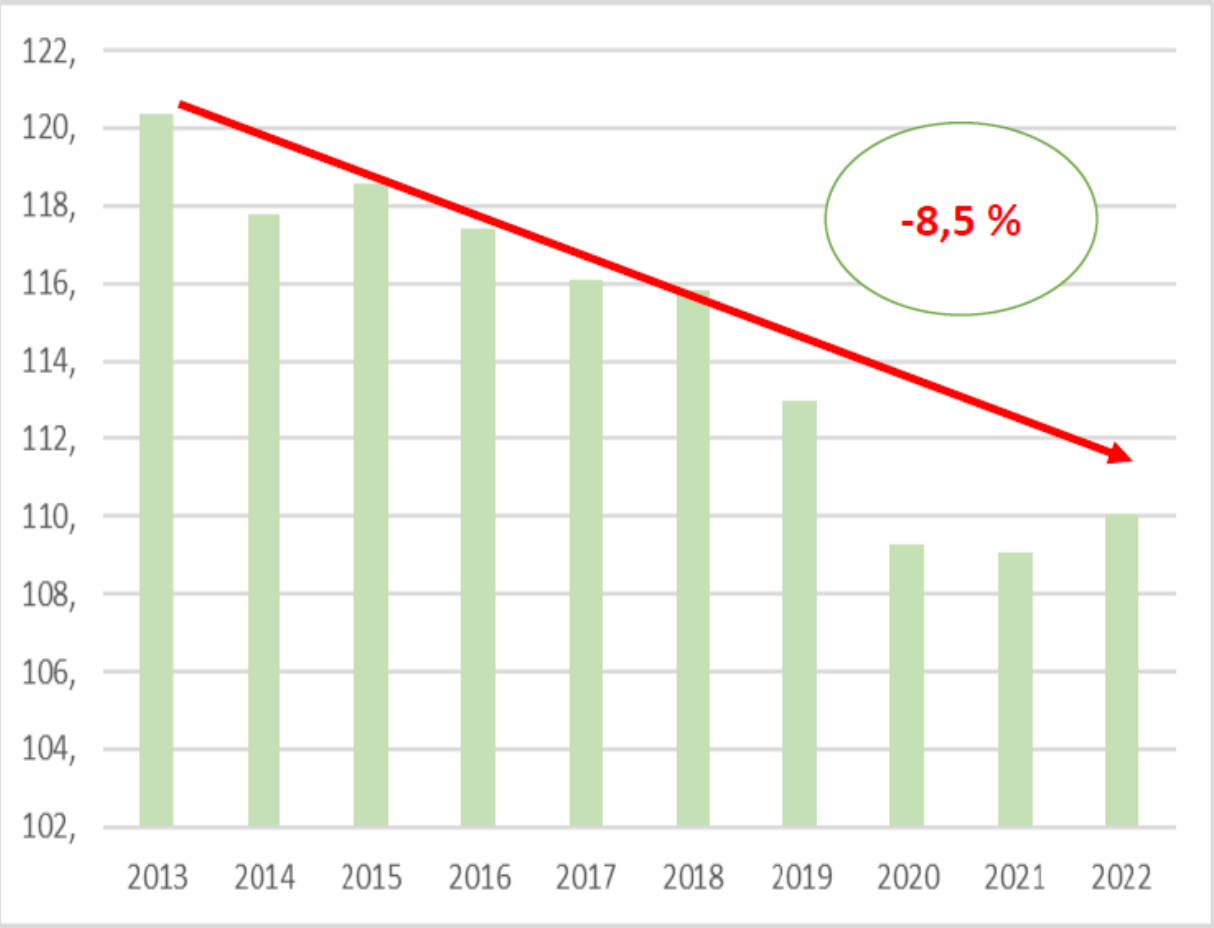
	Destination	in T
1	Egypt	294.531
2	United Kingdom	191.594
3	India	90.170
4	Saudi Arabia	81.370
5	Belarus	61.576
6	Kazakhstan	56.753
7	United Arab Emirat	35.432
8	Israel	30.828
9	Norway	30.566
10	Jordan	25.725

Izvoz jabolk iz držav EU 27 v letih 2021/22 (od avgusta do aprila) primerjalno z (2020/21) in 2019/2020



Napoved obsega površin pod hruško v letu 2022

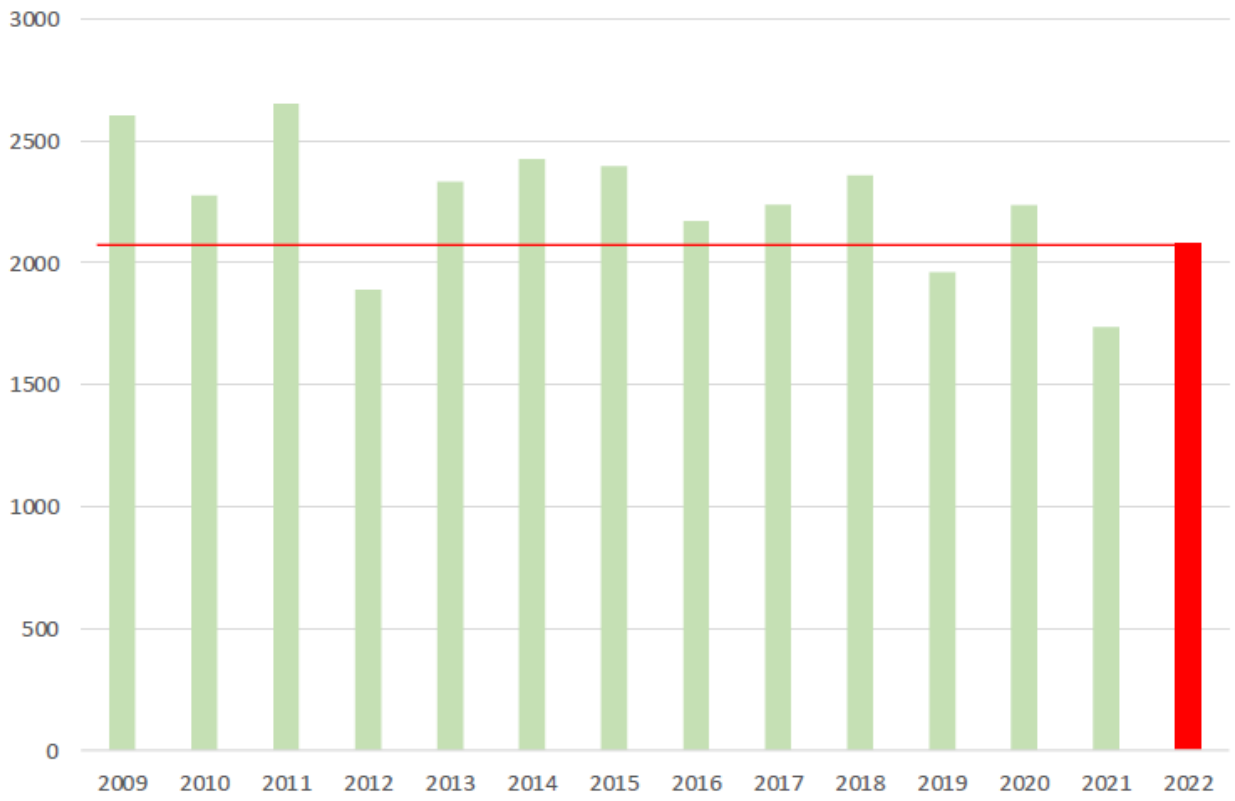
In 000 HA	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
EU 27+UK+CH	120,37	117,77	118,55	117,4	116,1	115,83	112,95	109,29	109,08	110,07
Belgium	8,92	9,08	9,34	9,69	10,02	10,15	10,37	10,66	10,45	10,45
Bulgaria	0,45	0,34	0,53	0,41	0,45	0,57	0,70	0,50	0,55	0,60
Czechia	0,90	0,88	0,79	0,74	0,71	0,75	0,80	0,83	0,80	0,78
Denmark	0,35	0,36	0,34	0,30	0,30	0,29	0,30	0,30	0,30	0,30
Germany	1,93	1,93	1,93	1,93	2,14	2,14	2,14	2,14	2,14	2,14
Ireland	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Greece	4,82	4,97	4,95	4,08	4,07	4,41	4,34	5,42	5,09	5,43
Spain	24,24	23,64	22,88	22,55	21,89	21,33	20,62	20,22	20,02	20,02
France	5,35	5,36	5,37	5,30	5,25	5,24	5,25	5,38	5,87	5,80
Croatia	0,77	1,04	0,90	0,93	0,71	0,80	0,86	0,73	0,75	0,75
Italy	31,53	30,15	30,86	32,29	31,73	31,34	28,71	26,60	26,79	26,82
Cyprus	0,09	0,08	0,07	0,07	0,07	0,06	0,06	0,06	0,05	0,05
Latvia	0,20	0,20	0,20	0,20	0,20	0,20	0,20	0,20	0,20	0,20
Lithuania	0,86	0,90	0,87	0,80	0,82	0,82	0,82	0,85	0,85	0,80
Luxembourg	0,02	0,02	0,02	0,02	0,02	0,02	0,02	0,01	0,01	0,01
Hungary	3,00	2,89	2,88	2,87	2,90	2,84	2,81	2,62	2,55	2,62
Netherlands	8,51	8,60	9,23	9,40	9,70	10,00	10,09	10,00	10,07	10,00
Austria	0,48	0,44	0,45	0,46	0,46	0,49	0,50	0,54	0,55	0,55
Poland	9,50	9,20	9,20	7,49	7,26	7,30	7,22	5,10	5,60	5,70
Portugal	12,01	12,01	12,12	11,99	11,54	11,21	11,33	11,33	11,33	11,16
Romania	3,91	3,46	2,91	3,15	3,12	3,10	3,08	3,09	3,11	3,17
Slovenia	0,22	0,21	0,20	0,20	0,20	0,21	0,21	0,22	0,23	0,23
Slovakia	0,17	0,13	0,11	0,11	0,11	0,12	0,11	0,10	0,09	0,09
Finland	0,00	0,00	0,04	0,04	0,04	0,05	0,04	0,05	0,05	0,05
Sweden	0,14	0,13	0,13	0,12	0,12	0,11	0,10	0,11	0,11	0,11
Switzerland	:	0,75	0,75	0,76	0,77	0,78	0,77	0,73	0,74	0,74
UK	2,00	1,00	1,48	1,50	1,50	1,50	1,50	1,50	1,50	1,50



Napoved pridelka hrušk v letu 2022

Country in 000 HA	2019	2020	2021	2022
BE	332	393	356	366
CR	3	2	2	2
CZ	6	6	7	8
DE	42	39	37	37
DK	4	6	6	7
ES	313	307	309	256
FR	121	133	58	137
GR	58	80	67	101
HU	32	16	16	17
IT	363	611	202	474
LV	1	1	1	1
NL	373	400	340	368
PL	70	65	70	95
PT	202	139	225	167
RO	18	19	21	21
SE	1	2	2	2
SK	1	1	1	1
SL	1	1	1	2
UK	20	17	15	16
TOTAL	1.961	2.238	1.736	2.078

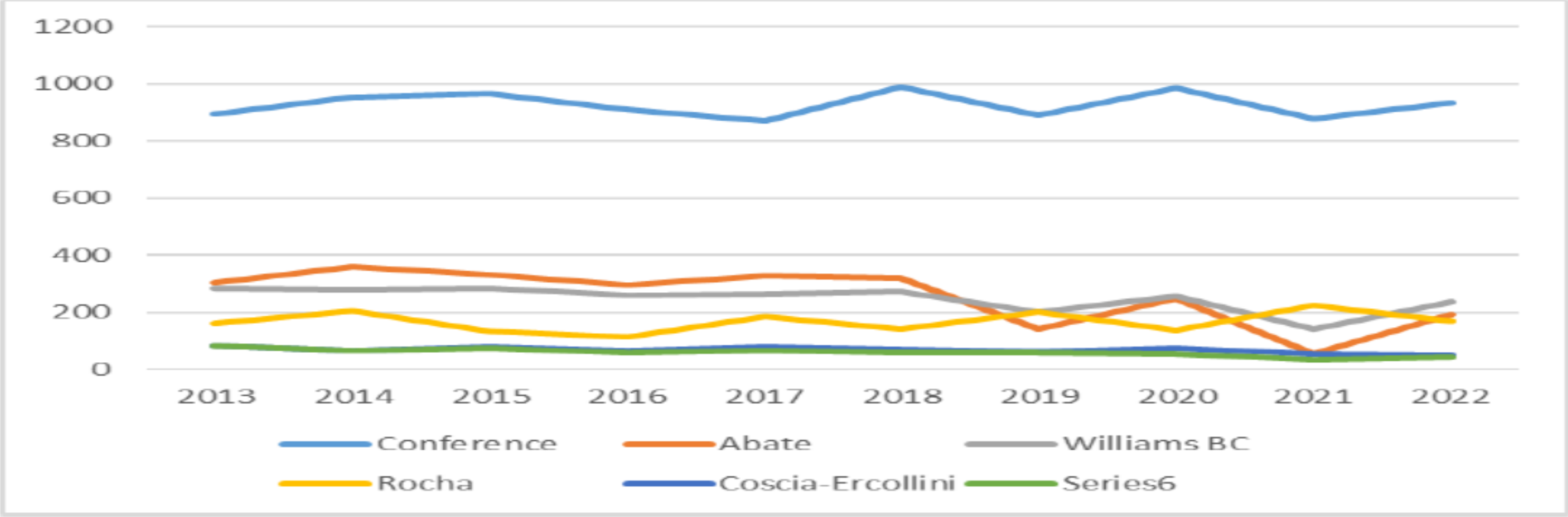
2.078.000 T



in 000 T	2013	2014	2015	2016	2017	2018	2019	2020	2021	AV
Austria	54,13	50,7	51,11	23,45	46,11	111,34	32,73	70,85	42,31	53

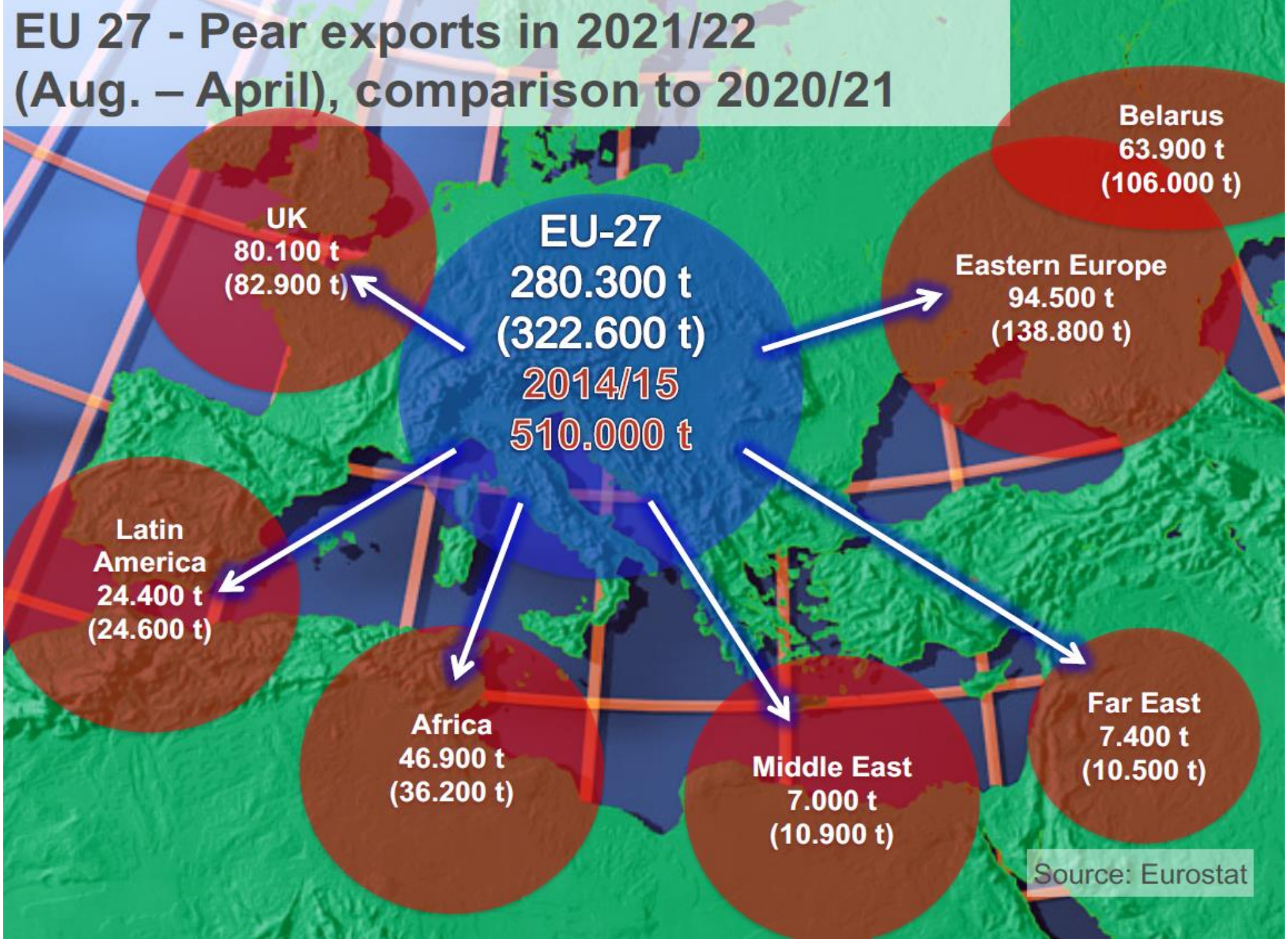
=> EU (28) => 2.130.000 T

Napoved pridelka hrušk po sortah v letu 2022



Varieties	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	increase in 000 T
Conference	894	952	967	908	871	988	892	984	877	935	58
Abate	304	358	333	296	328	318	140	247	53	194	141
Williams BC	283	278	283	261	263	272	200	257	140	237	97
Rocha	162	203	134	113	186	142	202	139	226	168	-58
Coscia-Ercollini	80	66	79	67	79	70	63	73	55	51	-4
Guyot	80	67	74	59	65	58	58	55	35	43	8

EU 27 - Pear exports in 2021/22 (Aug. – April), comparison to 2020/21



Viri in uporabne povezave

Spletna stran WAPA (The World Apple and Pear Association):
http://www.wapa-association.org/asp/index.asp

Več o PROGNOSFRUIT 2022 konferenci lahko najdete na:
https://prognosfruit.eu/en/welcome-to-prognosfruit/

Medijska odmevnost PROGNOSFRUIT 2022:

1. https://agrobiznis.finance.si/9003021/Tudi-sadjarji-bijejo-plat-zvona
2. https://www.index.hr/vijesti/clanak/sef-vocara-situacija-je-zabrinjavajuca-urod-jabuka-je-12-manji/2386314.aspx
3. https://www.youtube.com/watch?v=GG0Hncgbs14&t=4s
4. https://www.youtube.com/watch?v=vO-67bLmYQk
5. https://www.youtube.com/watch?v=q6oajo9vnHY&t=4s

Viri:

1. WAPA, Prognosfruit 2022
2. Helwig Schwartau, AMI d.o.o.
3. Fritz Prem, EBF

HVALA ZA POZORNOST.

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- **Združenja za sadjarstvo**
- **Združenja slovenskih vinarjev**
- **Zelenjavna veriga**

Gospodarska zbornica Slovenije

Zbornica kmetijskih in živilskih podjetij

SADJARSKI POSVET 2022

Okrogla miza

Franc Bogovič	EU poslanec
Dr. Katja Bidovec	MKPG, UVHVVR, Sektor za FFS
Branko Zupančič	podpredsednik GIZ fitofarmacije
Dr. Blaž Germšek	KIS, vodja centra za raziskave in poskusništvo Jablje
Dr. Metka Hudina	UL, BF, Oddelek za agronomijo, strokovna predstavnica Združenja za sadjarstvo pri GZS-ZKŽP
Doris Letina	vodja področja za mlade kmete in kmetijsko politiko pri ZSPM in mlada sadjarka

POVEZANI RASTEMO HITREJE 2022

60. MEDNARODNI
KMETIJSKO-ŽIVILSKI SEJEM AGRA
20. - 25. avgust 2022
Gornja Radgona

Gospodarska zbornica Slovenije
Zbornica kmetijskih in živilskih podjetij