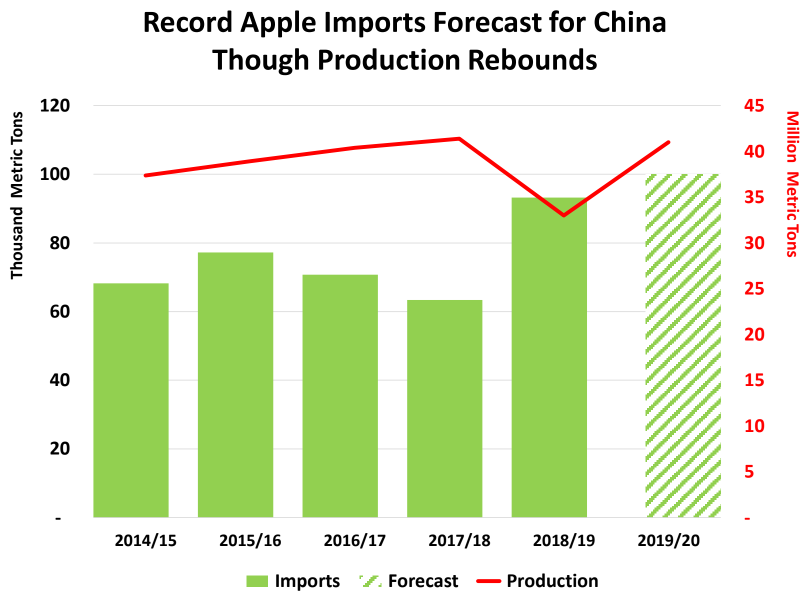
Fresh Apples, Grapes, and Pears: World Markets and Trade

United States Department of Agriculture
Foreign Agricultural Service
December 2019

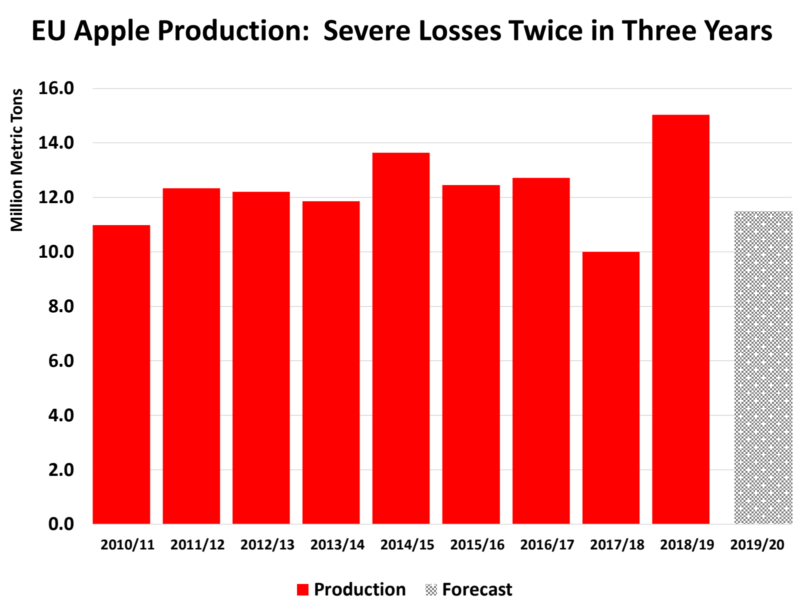
FRESH APPLES

World production for 2019/20 is forecast up nearly 5.0 million metric tons (tons) to 75.7 million, as rebounding production in China more than offsets sharply lower production in the European Union. Higher world trade is expected as a result of China's improved supplies.

China's production is forecast to rebound 8.0 million tons to 41.0 million, regaining all of last year's lost output from severe weather. Nearly all major growing provinces experienced favorable growing conditions throughout fruit development, and higher supplies are expected to boost exports up 230,000 tons to over 1.0 million. Though domestic supplies are higher, quality is reported as only fair, increasing import demand for higher quality apples to a record 100,000 tons.



EU production is slated to drop nearly 25 percent to 11.5 million tons as the majority of Member States, especially Poland, experienced a combination of frost, drought, heat, and hail. This will mark the second time in 3 years that weather-induced losses will lower production more than 20 percent. With reduced output, exports are forecast down 200,000 tons to 975,000, the second-lowest level since 2007/08. Imports are expected to remain nearly unchanged at 500,000 tons as a smaller share of domestic output goes towards processing and greater supplies are diverted to fresh consumption.



U.S. production is projected to rise 179,000 tons to 4.7 million on improved output in Washington resulting from favorable summer weather. USDA's National Agricultural Statistics Service (NASS) surveyed industry and published a U.S. forecast for apple production in the August 2019 *Crop Production* report*. Greater supplies and the removal of Mexico's 20-percent retaliatory tariff in May 2019 are expected to boost exports over 100,000 tons to 860,000. Imports are forecast to remain nearly unchanged at 145,000 tons as higher shipments from New Zealand offset lower shipments from Chile.

* Note: As of the 2018/19 marketing year, the number of U.S. states surveyed was reduced from 20 states to 7. The 13 eliminated states accounted for 5-6 percent of production in the 20017/18 marketing year. U.S. production is now based on surveys from only the following states: California, Michigan, New York, Oregon, Pennsylvania, Virginia, and Washington.

Turkey's production is expected to remain at last year's record 3.0 million tons on a mild winter and good conditions during flowering and fruit development. Despite greater supplies, exports are forecast to ease 17,000 tons to 260,000 on weaker demand from Middle East markets.

India's production is forecast flat at 2.4 million tons as late monsoon rains inhibited higher output. Imports are projected 27,000 tons lower to 250,000 reflecting the ongoing ban on apples from China and the continued retaliatory tariff on U.S. supplies.

Russia's production is forecast to rise over 100,000 tons to a record 1.7 million, a second straight record year as new orchards come into production and yields improve. The government continues to assist the industry through various support mechanisms including assistance for planting new orchards and orchard care as well as low-interest loans and partial reimbursements of capital expenses for construction of cold storage facilities. The Ministry of Agriculture is forecasting cold storage capacity to rise from 670,000 tons in 2019 to 1.6 million by 2025. Greater quantities and improved quality of domestic supplies are expected to ease demand for imports, declining 80,000 tons to 710,000. Nonetheless, Russia still retains its position as the world's top apple importer

Chile's production is projected down 86,000 tons to 1.1 million due to drought and decreasing planting area. This will mark the sixth straight year of declining acreage as growers switch to more profitable crops such as cherries and tree nuts. Exports are forecast down 45,000 tons to 660,000 on reduced supplies with shipments expected to shift more towards India and Asian markets.

South Africa's production is anticipated to return to previous levels, bumping up 50,000 tons to 910,000 on normal winter rainfall, improved water management practices, and new plantings coming into production. Quality is also expected to improve as a result of good moisture, and, combined with higher output, is forecast to drive exports up nearly 20 percent to a record 570,000 tons.

Mexico's production is expected to rebound over 130,000 tons to 680,000 as new trees come into production and good growing conditions lead to higher yield. The top growing state of Chihuahua has seen significant growth the last 10 years due to investment in new high-density orchards and slowly expanding planting area. The removal of the 20-percent retaliatory tariff on U.S. supplies in May 2019 is expected to boost imports over 30,000 tons to 280,000.

New Zealand's production is projected up for a third straight year, rising over 20,000 tons to 600,000 as trees from expanded planting area come into production. Planting area is expected to continue its rise, though at a slower pace. To raise output, growers are increasingly turning towards reinvesting in existing orchards, replacing older varieties and undertaking higher-density plantings. Higher supplies are expected to boost exports 15,000 tons to 405,000 with more shipments going towards Asian markets.

Argentina's production is forecast flat at 550,000 tons as good growing conditions and new higher-yield orchards offset losses stemming from the continued decline in planting area. Growers continue to face challenges that threaten the long-term viability of the industry as rising input costs and lack of available resources hinder even basic orchard health practices. In line with production, exports are expected to remain unchanged at 90,000 tons.

Key Revisions to 2018/19:

Country	Attribute	Previous	Current	Change	Reason
China	Production	31,000	33,000	2,000	revised data
	Exports	880	818	-62	lower shipments to Southeast Asian markets
European Union	Production	14,009	15,030	1,022	higher-than-expected production
	Imports	470	493	23	higher shipments from Chile and New Zealand
India	Imports	245	277	32	higher shipments from the European Union
Iran	Production	2,799	2,097	-703	updated FAO data
Jordan	Imports	0	54	54	new country added to PSD, data has been added going back to 2001/02
Moldova	Exports	0	297	297	new country added to PSD, data has been added going back to 2001/02
South Africa	Exports	540	480	-60	lower-than-expected shipments to the European Union and countries in Africa
United States	Production	5,048	4,486	-562	Washington reported very challenging fire blight, less fruit on trees than initially appeared
*Note: All figures are in thousand metric tons.					

FRESH TABLE GRAPES

World production for 2019/20 is expected to rise 4 percent to 23.4 million tons as gains in China and India more than offset losses in the European Union resulting from heavy rains. Higher supplies are forecast to boost exports slightly while imports are also projected up on higher shipments to the United States.

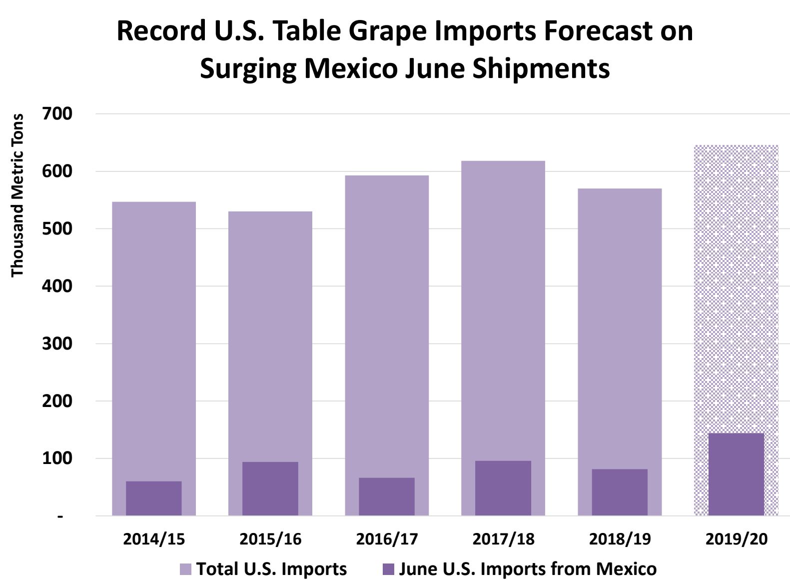
China's production is projected to rebound from last year's frost-damaged crop, rising 900,000 tons to 10.8 million. Greater supplies are expected to spur exports up 30,000 tons to 320,000, especially to Thailand and Vietnam. Imports are forecast slightly lower to 250,000 tons as improved domestic supplies lower import demand. Ironically, Spain and Portugal recently gained market access in China; Spain is the European Union's second-largest table grape producer. The United States is currently China's leading Northern Hemisphere supplier.

India's production is forecast up 200,000 tons to a record 3.0 million, though this is lower than initially expected. Heavy rains in September and October in northern Maharashtra are causing losses, affecting yield and quality. With fewer export-quality supplies, exports are expected to slip 27,000 tons to 220,000.

Turkey's production is expected to rise slightly to 2.0 million tons despite reports of hail damage in parts of the Aegean Region. Exports are expected to remain unchanged at 180,000 tons as a lack of newer consumer-preferred varieties limits foreign demand.

EU production is forecast to drop 220,000 tons to 1.4 million as heavy rains during flowering caused significant losses in Italy, the top growing Member State. Despite lower supplies, demand is expected to keep imports at last year's level of 690,000 tons, while exports are forecast flat at 78,000 tons. Diminished output coupled with sluggish demand is anticipated to reduce domestic consumption to 2.0 million tons, the lowest since at least 2001/02 (the earliest year in the PSD database).

U.S. production is expected to remain steady at 998,000 on good growing conditions. USDA's National Agricultural Statistics Service surveyed industry and published a U.S. forecast for grape production in the August 2019 *Crop Production* report. Exports are forecast down 23,000 tons to 345,000 on lower demand from Mexico, while imports are projected up to a record 645,000 tons on record June shipments from Mexico in the beginning of the marketing year. Large quantities of high-quality domestic supplies are expected to underpin the rising trend in domestic consumption.



Peru's production is forecast up 18,000 tons to 648,000 on good growing conditions and new plantings coming into production as planting area continues to expand. In line with production, exports are projected up 16,000 tons to 400,000, with the majority of shipments going to the United States.

Chile's production is expected to ease 26,000 tons to 809,000 as drought affects output in top growing regions Valparaiso and O'Higgins. Planting area is on a slow downward trend, however, growers are transitioning to consumer-preferred seedless varieties in an effort to better serve markets and stay competitive. Exports are forecast down 20,000 tons to 640,000 on lower supplies but also declining demand for older varieties still being grown.

Russia's production is forecast flat at 21,000 tons on unchanging planting area as land suitable for grapes is more likely to go towards wine grape varieties. Imports are projected down 10,000 tons to 280,000 on lower shipments from top supplier Turkey and as consumers shift to less expensive fruit during the winter season.

South Africa's production is projected to rise 12,000 tons to 310,000 on good growing conditions, sufficient water, and increased harvest area, some of which has been converted from wine grapes. Greater supplies and higher demand in Asian markets are expected to give a slight boost to exports, up 10,000 tons to 285,000.

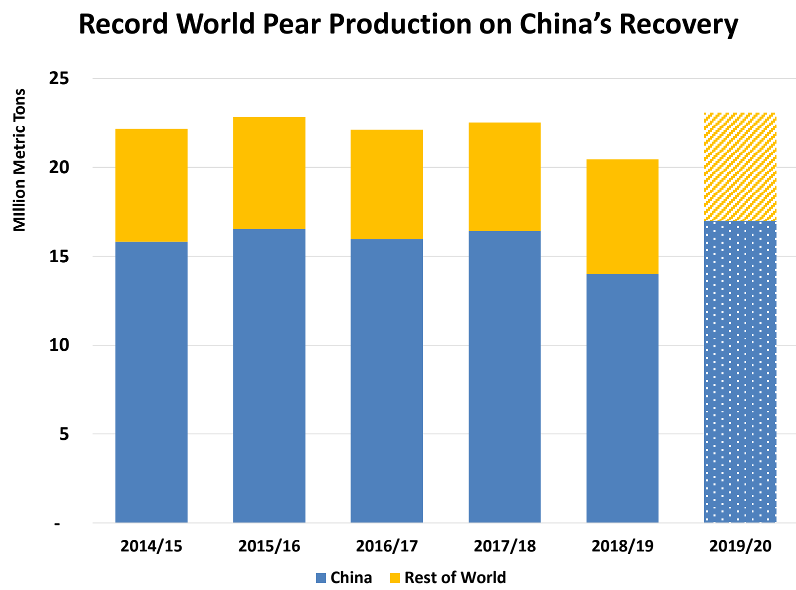
Australia's production is projected up 30,000 tons to 240,000 on new plantings coming into production, making this the eighth year of growth in the last 10 years. Though conditions are dry, attractive returns are anticipated to help offset higher water costs. The growth trend in production is expected to continue as vine plantings increase in response to strong demand from Asian markets. Higher supplies are expected to boost exports 20 percent to 175,000 tons. Over the last 5 years, Australia has normally exported over 60 percent of its production each year.

Key Revisions to 2018/19:

Country	Attribute	Previous	Current	Change	Reason
China	Production	9,450	9,900	450	revised official data
Mexico	Imports	102	127	25	higher-than-expected imports from the United States
Australia	Exports	115	146	31	higher-than-expected shipments to China and Indonesia
Hong Kong	Exports	210	226	16	higher shipments to China
India	Exports	205	247	42	higher shipments to the European Union
*Note: All figures are in thousand metric tons.					

FRESH PEARS

World production for 2019/20 is forecast up 13 percent to a record 23.1 million tons as gains in China more than offset weather-induced losses in the European Union. Higher output in China is expected to boost global trade.



China's production is projected to rebound from last years' frost-damaged crop, surging over 20 percent to 17.0 million tons on favorable weather. Improved supplies are forecast to drive exports up almost 40 percent to 500,000 tons on higher shipments, especially to Indonesia and Vietnam. Imports, though small, are also forecast up, rising to 15,000 tons as successful EU marketing campaigns rouse interest in Western pear varieties.

EU production is forecast down over 400,000 tons to 2.2 million as nearly all Member States experienced crop-damaging weather. Exports are expected to plummet nearly 30 percent to 220,000 tons on reduced output, while the lower supplies are expected to boost import demand by 12,000 tons to 180,000.

U.S. production is unchanged at 726,000 tons as higher yield in California on good weather conditions offsets losses in Washington resulting from fire blight disease, hail, and heavy rain. USDA's National Agricultural Statistics Service surveyed industry and published a U.S. forecast for pear production in the August 2019 *Crop Production* report. Exports are expected up slightly to 150,000 tons on improved deliveries to top markets, including Mexico, Canada, and India. Higher shipments from China and South Korea are expected to help lift imports, forecast up 7,500 tons to 80,000.

Argentina's production is forecast unchanged at 590,000 tons on normal weather conditions. The industry continues to struggle with rising input costs and lack of investment. Exports are also expected to remain steady at 300,000 tons on sustained demand from Northern Hemisphere markets.

Chile's production is expected to see a drop of 25,000 tons to 227,000, a third straight year of reduced output as drought lowers yield and planted area continues to decline. Shrinking supplies are expected to lower exports 13,000 tons to 117,000, its lowest level since 2013/14.

South Africa's production is projected up slightly to 415,000 tons on normal winter rainfall and new plantings coming into production. With nearly 60 percent of production exported on average, higher supplies are expected to raise exports 5,000 tons to 245,000.

Russia's production is forecast slightly higher to 245,000 tons on improved output in non-commercial, or house-hold, orchards. Imports are expected to ease again, down to 253,000 tons, as consumers continue to lean towards less expensive fruit. However, Russia remains the world's top pear importer.

Key Revisions to 2018/19:

Country	Attribute	Previous	Current	Change	Reason
China	Production	13,100	14,000	900	revised official data
	Exports	390	366	-24	lower shipments to Southeast Asia markets
European Union	Imports	200	168	-32	lower shipments from Chile and South Africa
Indonesia	Imports	165	145	-20	lower than anticipated shipments from China
*Note: All figures are in thousand metric tons.					

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Marketing Years:

Apples - The United States and Mexico are on an August-July marketing year. All other Northern Hemisphere countries are on a July-June marketing year. Southern Hemisphere countries are on a calendar year indicated as the second year of the split year.

Table Grapes - The United States and Mexico are on a May-April marketing year. All other Northern Hemisphere countries are on a June-May marketing year. The Southern Hemisphere countries of Argentina, Australia, Chile, Peru, and South Africa are on an October-September marketing year. Brazil is on a calendar year indicated as the second year of the split year.

Pears - Northern Hemisphere countries are on a July-June marketing year. Southern Hemisphere countries are on a calendar year indicated as the second year of the split year.

Apples, Fresh: Production, Supply and Distribution in Selected Countries

(1,000 Metric Tons)

	2014/15	2015/16	2016/17	2017/18	2018/19	Dec 2019/20
Production						
China	37,350	38,900	40,393	41,390	33,000	41,000
European Union	13,636	12,453	12,723	10,005	15,030	11,477
United States	5,112	4,546	5,010	5,085	4,486	4,665
Turkey	2,289	2,740	2,900	2,750	3,000	3,000
India	2,498	2,520	2,258	1,920	2,371	2,370
Iran	2,500	2,470	2,097	2,097	2,097	2,097
Russia	1,409	1,311	1,509	1,360	1,611	1,714
Brazil	1,265	1,049	1,301	1,301	1,301	1,301
Chile	1,210	1,335	1,310	1,330	1,230	1,144
Ukraine	1,180	1,099	1,076	1,076	1,076	1,076
Other	6,072	6,215	5,855	5,892	5,761	5,878
Total	74,520	74,638	76,432	74,205	70,964	75,722
Fresh Dom. Consumption						
China	33,470	33,826	34,682	35,371	29,775	38,050
European Union	7,781	7,544	7,750	6,544	8,197	7,401
Turkey	2,064	2,532	2,576	2,452	2,614	2,631
United States	2,714	2,553	2,817	2,672	2,518	2,589
India	2,681	2,311	2,230	1,919	2,330	2,365
Russia	1,803	1,646	1,583	1,807	1,863	1,884
Iran	2,358	2,036	1,864	1,372	1,814	1,814
Other	10,261	10,806	10,587	10,242	9,766	10,174
Total	63,131	63,254	64,089	62,380	58,877	66,907
For Processing						
European Union	4,139	3,601	3,817	3,229	6,151	3,601
China	3,200	4,000	4,400	4,800	2,500	2,000
United States	1,524	1,404	1,497	1,540	1,372	1,361
Russia	370	335	459	349	455	460
Chile	332	320	310	310	286	256
Argentina	300	230	232	216	220	221
Canada	151	142	172	151	166	164
Other	597	585	508	561	471	454
Total	10,613	10,616	11,395	11,156	11,621	8,517
Imports						
Russia	820	746	657	859	789	710
European Union	400	451	425	531	493	500
Iraq	122	297	241	307	319	330
Mexico	314	218	267	287	247	280
India	204	202	370	249	277	250
Bangladesh	151	203	245	245	188	240
Belarus	724	657	544	224	219	220
Canada	217	230	221	222	203	220
Egypt	201	268	145	72	271	215
Vietnam	116	141	150	160	158	190
Other	2,865	3,061	2,987	2,905	2,599	2,814
Total	6,135	6,474	6,253	6,061	5,764	5,969
Exports						
China	748	1,151	1,381	1,282	818	1,050
European Union	1,792	1,590	1,487	761	1,176	975
United States	1,037	778	868	1,007	742	860
Chile	628	765	716	779	705	660
South Africa	466	511	553	449	480	570
New Zealand	329	347	345	369	390	405
Iran	142	435	233	725	283	283
Turkey	128	109	215	189	277	260
Moldova	135	171	168	269	297	230
Serbia	153	233	239	156	184	175
Other	974	583	473	495	568	501
Total	6,532	6,672	6,679	6,481	5,921	5,969

Note: The United States and Mexico are on an August-July marketing year. All other Northern Hemisphere countries are on a July-June marketing year. Southern Hemisphere countries are on a calendar year indicated as the second year of the split year.

Grapes, Fresh Table: Production, Supply and Distribution in Selected Countries

(1,000 Metric Tons)

	2014/15	2015/16	2016/17	2017/18	2018/19	Dec 2019/20
Production						
China	8,800	10,000	10,100	10,500	9,900	10,800
India	2,823	2,590	2,784	2,800	2,800	3,000
Turkey	2,350	2,005	2,350	2,120	1,900	1,950
Uzbekistan	1,579	1,570	1,626	1,626	1,626	1,626
European Union	1,638	1,753	1,718	1,448	1,597	1,376
United States	955	947	943	935	997	998
Brazil	1,498	985	985	985	985	985
Chile	939	868	917	915	835	809
Peru	500	540	611	623	630	648
Mexico	247	282	256	339	371	375
Other	986	929	861	850	823	864
Total	22,316	22,468	23,150	23,140	22,462	23,430
Fresh Dom. Consumption						
China	8,899	10,022	10,080	10,464	9,873	10,730
India	2,752	2,220	2,358	2,401	2,330	2,477
European Union	2,131	2,280	2,280	2,056	2,200	1,988
Turkey	2,094	1,831	2,177	1,841	1,721	1,770
Uzbekistan	1,521	1,464	1,528	1,499	1,508	1,526
United States	1,113	1,150	1,189	1,217	1,199	1,298
Brazil	1,495	982	964	964	956	955
Korea, South	324	296	286	285	309	301
Russia	389	346	228	412	309	300
Mexico	179	201	188	244	351	255
Other	1,324	1,365	1,473	1,557	1,396	1,428
Total	22,220	22,156	22,753	22,941	22,150	23,026
Imports						
European Union	604	615	649	687	682	690
United States	547	530	593	618	570	645
Russia	302	256	212	387	290	280
China	226	249	237	242	262	250
Hong Kong	215	232	229	250	259	240
Canada	175	170	176	180	180	180
Thailand	89	131	157	143	124	145
Indonesia	48	49	68	81	112	115
Vietnam	49	74	74	101	101	115
Mexico	84	82	88	101	127	100
Other	365	369	398	375	378	369
Total	2,705	2,758	2,882	3,165	3,084	3,129
Exports						
Chile	761	688	731	731	660	640
Peru	280	297	311	277	384	400
United States	389	328	347	336	368	345
China	127	227	257	278	289	320
South Africa	264	255	304	279	275	285
India	76	160	200	210	247	220
Mexico	152	164	156	196	147	220
Hong Kong	172	190	212	214	226	210
Turkey	257	175	173	280	180	180
Australia	84	110	107	110	146	175
Other	216	238	236	253	244	226
Total	2,777	2,831	3,033	3,164	3,165	3,221

Note: The United States and Mexico are on a May-April marketing year. All other Northern Hemisphere countries are on a June-May marketing year. Southern Hemisphere producer countries of Argentina, Australia, Chile, Peru, and South Africa are on an October-September marketing year, and Brazil is on a calendar year indicated as the second year of the split year. Some countries may include raisin-type and/or table-type grapes.

Pears, Fresh: Production, Supply and Distribution in Selected Countries

(1,000 Metric Tons)

	2014/15	2015/16	2016/17	2017/18	2018/19	Dec 2019/20
Production						
China	15,820	16,530	15,960	16,410	14,000	17,000
European Union	2,566	2,513	2,340	2,384	2,592	2,184
United States	754	729	668	663	726	726
Argentina	590	580	540	580	590	590
Turkey	305	415	440	420	450	490
South Africa	411	430	432	408	410	415
India	317	323	340	280	340	340
Japan	277	278	275	275	275	275
Russia	160	155	236	218	243	245
Chile	290	267	290	262	252	227
Other	681	604	602	634	573	577
Total	22,170	22,824	22,122	22,534	20,451	23,069
Fresh Dom. Consumption						
China	13,848	14,437	13,938	14,325	12,445	14,915
European Union	2,027	2,048	1,965	1,954	1,898	1,894
Turkey	282	381	414	366	398	435
United States	414	390	406	398	434	425
Russia	400	397	390	423	389	382
India	335	299	326	261	321	360
Japan	276	277	273	273	273	273
Brazil	201	162	178	180	176	177
Korea, South	273	228	202	230	171	174
Indonesia	86	92	155	180	145	160
Other	1,162	1,175	1,214	1,242	1,201	1,274
Total	19,302	19,886	19,461	19,832	17,851	20,471
For Processing						
China	1,650	1,700	1,520	1,550	1,200	1,600
European Union	294	356	275	285	552	250
United States	255	262	209	222	220	230
Argentina	153	170	160	160	190	190
South Africa	160	132	119	144	127	127
Russia	9	9	55	47	69	70
Chile	58	56	57	57	52	44
Turkey	7	10	10	10	10	10
Korea, South	6	10	10	4	5	6
Mexico	4	4	4	4	5	4
Other	2	9	10	9	10	3
Total	2,599	2,718	2,430	2,493	2,440	2,535
Imports						
Russia	265	267	252	285	258	253
European Union	221	224	208	199	168	180
Indonesia	86	92	155	180	145	160
Brazil	179	147	156	158	154	155
Vietnam	43	73	79	87	63	130
Belarus	186	151	152	133	118	110
Mexico	85	77	67	72	92	90
Other	567	581	584	602	572	600
Total	1,632	1,612	1,652	1,716	1,570	1,678
Exports						
China	332	401	509	543	366	500
Argentina	333	310	280	320	300	300
South Africa	205	250	266	222	240	245
European Union	417	310	308	345	310	220
United States	175	156	126	122	144	150
Chile	144	129	152	129	130	117
Belarus	163	122	92	83	70	65
Other	67	73	69	100	93	100
Total	1,836	1,752	1,800	1,864	1,654	1,697

Note: Northern Hemisphere countries are on a July-June marketing year. Southern Hemisphere countries are on a calendar year indicated as the second year of the split year.