



June 2022

United States Department of Agriculture Foreign Agricultural Service

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

FRESH APPLES

World production for 2021/22 is projected up 1.0 million tons to 81.6 million as China supplies edge upward and several EU Member States recover from the previous year's damaging weather. Imports are expected to slip on reduced shipments to Russia.

China production is expected to rise nearly 1.0 million tons to 45.0 million on output from new plantings coming into production, though a string of adverse weather events is expected to reduce supplies of high-quality fruit. Acreage is estimated to remain nearly unchanged, but some farmers are converting land to more profitable fruit such as cherries. Despite higher supplies of lower-quality fruit, exports are forecast down 72,000 tons to 1.0 million as COVID-19-related disruptions hinder shipments to several key ASEAN markets, including Myanmar, Philippines, and Thailand. Sustained shipments from New Zealand and South Africa are expected to keep imports nearly unchanged at 65,000 tons.

EU production is estimated nearly flat at 11.9 million tons as losses from a spring frost in Italy and France are offset by rebounds in leading producers Poland, Spain, and Hungary. In line with production, exports are forecast nearly unchanged at 1.0 million tons, while imports edge higher to 335,000 tons on greater shipments from Chile.

U.S. production is expected to shrink 170,000 tons to 4.3 million, its lowest level since 2012/13, as high temperatures affected yield in Washington and frost reduced Michigan's output. USDA's National Agricultural Statistics Service (NASS) surveyed industry and updated U.S. production in the May 2022 *Noncitrus Fruits and Nuts 2021 Summary* report. Reduced supplies are expected to pressure exports 63,000 tons lower to 715,000, their lowest level since 2007/08. Gains to top markets Mexico, Canada, and Taiwan are more than offset by losses to other Asian markets, including India. Imports are expected to rise 11,000 tons to 120,000 on higher shipments from all major suppliers.

Turkey production is anticipated to remain elevated at 4.3 million tons despite a spring frost in the second largest apple-producing province of Karaman. Exports are projected up to a record 385,000 tons on surges in shipments to India and Middle East markets, rising over 80 percent in just 2 years. Investments in newer varieties are continuing in an effort to meet export demand, with the number of export markets doubling since 2016/17.

India production is projected unchanged at 2.3 million tons but good growing conditions will improve quality. The top producing state of Jammu and Kashmir is working to rejuvenate and convert orchards to high-density plantings and varieties, with state subsidies to cover plant material, micro-irrigation systems, and anti-hail nets. Following last year's record, imports are expected to rise to 430,000 tons to support growing domestic consumption and are mostly from Iran and Turkey.

Approved by the World Agricultural Outlook Board/USDA

For email subscription, click here to register:

<https://public.govdelivery.com/accounts/USDAFAS/subscriber/new>

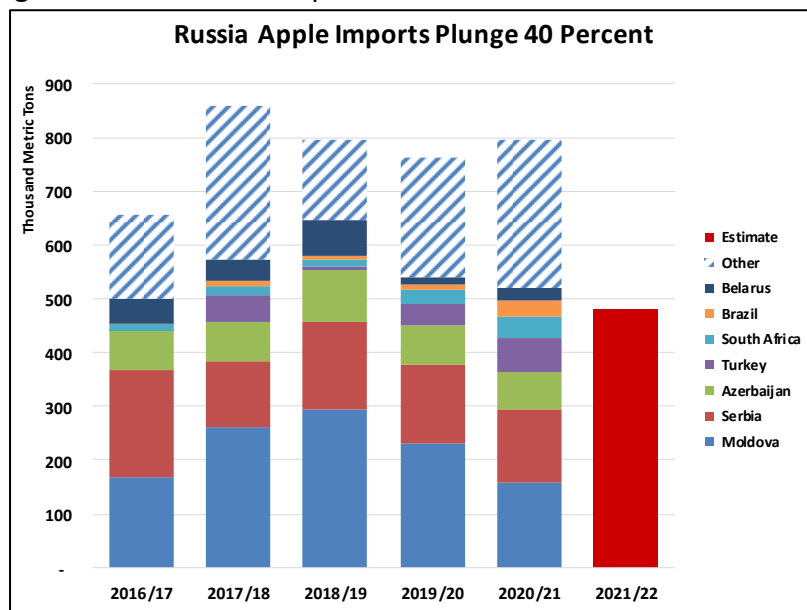
South Africa production is expected to rise for a fourth straight year to a record 1.2 million tons. Volumes are up as new trees are coming into production and sufficient water for irrigation combines with good growing conditions throughout the year, leading to higher output. Many growers have also invested in netting to help manage impacts of weather and pests, resulting in higher yields. Greater supplies are expected to boost exports to a record 625,000 tons.

Chile production is anticipated to slip 50,000 tons to 1.0 million. Planting area continues to decrease in the top growing regions of Maule and O’Higgins as growers shift to more profitable crops such as walnuts and cherries. Exports are expected to continue their decline on reduced supplies, contracting over 30,000 tons to 610,000.

Mexico production is projected up 66,000 tons to 780,000 on higher yields resulting from favorable pre-harvest rainfall. Imports are also expected to edge higher to 265,000 tons on higher U.S. shipments, combining with higher domestic supplies to lift consumption above 1.0 million tons.

New Zealand production is expected to improve only slightly to 553,000 tons as labor shortages and a delayed harvest prevented greater volumes from being picked and packed. Planted area is expected to remain unchanged though growers continue to replace old blocks of trees with newer high-yield varieties and new trellising systems. Exports are projected to rise to 375,000 tons following last year’s decline as growers prioritize picking high-value varieties and export-quality fruit.

Russia imports are projected to drop 40 percent to 480,000 tons. Shipments from most suppliers have been lower throughout the year, including Southern Hemisphere countries at the start of the marketing year, more than offsetting gains from top supplier Moldova.



FRESH TABLE GRAPES

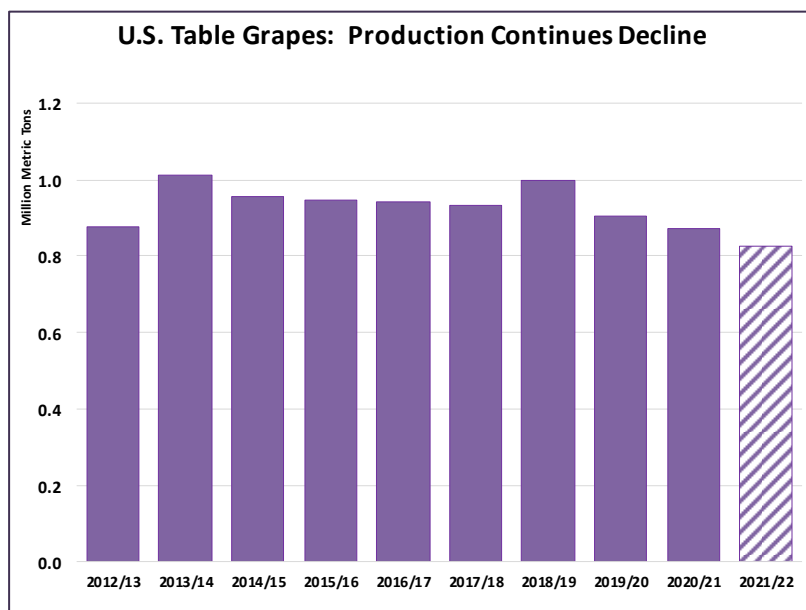
World production is anticipated to rise nearly 1.0 million tons to 25.5 million on recovering supplies in India and higher output in China. Exports are expected to remain flat at 3.6 million tons as reduced shipments from China and the United States offset gains from Chile and Peru.

China production is projected up 300,000 tons to 11.2 million on good crops in the top producing provinces of Xinjiang, Hebei, and Shandong. The industry is continuing to make investments, expanding production facilities and increasing plantings of new varieties such as Crimson Seedless and Shine Muscat. Despite higher supplies, exports are projected down to 350,000 tons as COVID-19-related disruptions impact shipments especially to top markets Vietnam and Thailand. Imports are expected to ease slightly to 185,000 tons as losses from Australia more than offset gains from Peru.

India production is expected to rebound to 2018/19 levels, rising 600,000 tons to 2.9 million on good weather and the ability to conduct vital maintenance on vineyards due to improved labor availability. Higher output is projected to boost consumption over 25 percent to 2.3 million tons, facilitated by wholesale markets recovering from COVID-19 restrictions. Exports are expected to contract slightly to 255,000 tons on reduced shipments to the United Kingdom.

Turkey production is projected to fall 280,000 tons to 1.9 million due to frost damage in the main producing region of Manisa. Though volumes are lower, higher prices in export markets are expected to drive shipments up to 265,000 tons with greater supplies going to Ukraine, Russia, and Belarus. The bulk of these shipments occur between July and December.

U.S. production is expected to contract 45,000 tons to 826,000, the lowest level since 2009/10, as higher summer temperatures and lower water availability for irrigation reduced yields in California. USDA's NASS surveyed industry and updated U.S. production in the May 2022 *Noncitrus Fruits and Nuts 2021 Summary* report. Final trade data shows exports fell for a third straight year, down 54,000 tons to 260,000 reflecting lower supplies. Imports were up over 40,000 tons to a record 713,000 as higher shipments from Peru and rebounding supplies from Chile more than offset weather-reduced shipments from Mexico.



EU production is projected to hold steady at 1.4 million tons as rebounding supplies in Italy from good fruitset negate weather-related losses in other grower Member States. Modest growth in acreage is expected on new investments in seedless varieties in Italy, Spain, and Portugal. High transportation costs are expected to pressure exports down to 165,000 tons, while reduced shipments from South Africa and Peru lower imports slightly to 560,000 tons.

Chile production is projected up 100,000 tons to 765,000, rebounding from last year's damaging rains in the main growing regions of Metropolitana, O'Higgins, and Valparaiso. In line with production, higher supplies are expected to boost exports over 50,000 tons to 580,000.

Peru production is anticipated to continue its upward trend, rising to 700,000 tons on favorable growing conditions and output from new plantings continuing to come into production. Though Red Globe remains the dominant variety, grown mainly for export to China, consumer preferences in other markets are spurring growers to broaden the varietal mix. Higher supplies are expected to drive exports up for a fourth straight year, rising over 60,000 tons to 530,000.

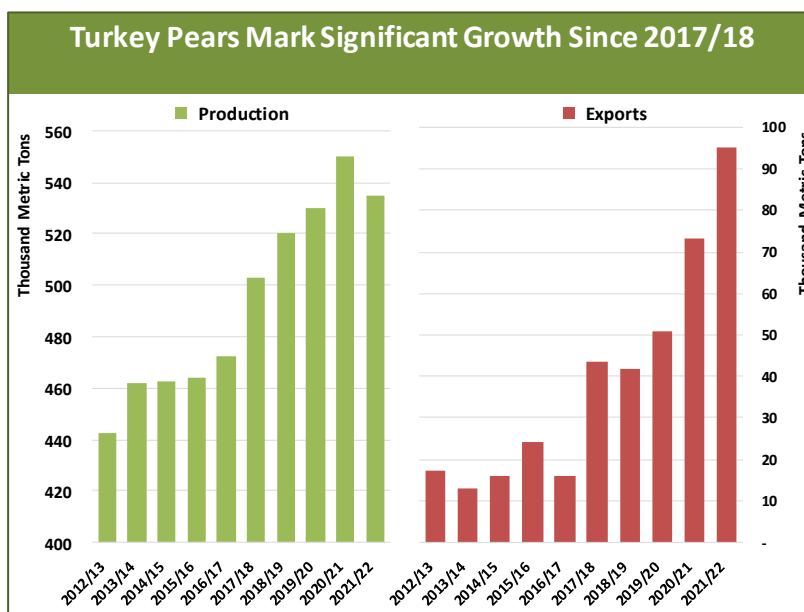
Australia production is expected to see a slight improvement to 210,000 tons. New plantings are coming into production though COVID-19-related harvest labor shortages have curtailed output and reduced overall fruit quality. Acreage continues to expand, though at a lower rate, including conversion of wine grape areas to table grapes. Lower supplies of export quality fruit are expected to reduce exports to 110,000 tons.

South Africa production is anticipated to reach record volumes for the third straight year as good growing conditions throughout the year and high-yield varieties coming into production boost supplies to 380,000 tons. Growers are continuing to replace seeded with seedless varieties to meet export demand. However, after near-constant growth since 2010, planted area is expected to remain flat as rising input costs check expansion. Despite record supplies, exports are expected to remain essentially unchanged at 320,000 tons as rising shipping costs and inefficiencies at the Port of Cape Town deter more robust shipments.

Russia imports are projected up 30,000 tons to 380,000 on a surge in shipments from Uzbekistan, which primarily occurred between August and November.

Turkey Pears Expand Global Presence

Turkey is currently ranked fifth among pear producers and seventh among exporters after significant growth over the past 5 years. In the first half of the last decade, Turkey's production was range-bound from 440,000-470,000 tons and exports saw minimal growth. But starting in 2017/18, both production and exports saw a sharp rise and since then have seen almost non-stop growth.



Turkey produces domestic and foreign pear varieties which are grown predominantly in the northwest region of Marmara, followed by the Aegean and Mediterranean regions. But due to rising demand in export markets, an increasing number of orchards are seeing non-commercial varieties replaced with those preferred by consumers in export markets. The number of export markets has grown from less than 40 in 2012/13 to more than 50 by 2020/21. This continued success and rising demand are spurring growers to also expand operations and invest in new orchards. Though modest, growth in acreage has been steady since 2016/17, averaging about 3 percent per year, with production surpassing 500,000 tons for the first time in 2017/18. Output has continued to edge higher, reaching a peak of 550,000 tons in 2020/21. Though unfavorable weather is expected to reduce output slightly in 2021/22, production should continue to rise in the future as new plantings come online.

Turkey has been a top exporter for more than 10 years, but as with production, 2017/18 marked a significant upward turn. Prior to this point, annual exports averaged less than 20,000 tons and 4 percent of production, but 2017/18 saw exports nearly triple from 16,000 tons to 44,000, and annual growth in most subsequent years has been above 20 percent. Export markets also shifted for Turkey beginning in 2017/18. The European Union was Turkey's top destination in 2012/13, accounting for 45 percent of exports, but Russia became the top market in 2017/18 at 36 percent market share. Within 5 years, Turkey's market share in Russia

rose from less than 1 percent in 2016/17 to 12 percent in 2020/21. Iraq is Turkey's second-largest market averaging 28 percent, while the European Union is third averaging 18 percent. Higher supplies have enabled trade success, but even with lower output in 2021/22, exports are still expected to surge 30 percent to 95,000 tons on strong demand from top markets Russia and Iraq. If realized, this would be almost 20 percent of production and a third straight year of record exports. It remains to be seen how the current conflict between Russia and Ukraine impacts future growth.

FRESH PEARS

World production for 2021/22 is expected to rise over 900,000 tons to 23.5 million as recovering supplies in China more than offset weather-related losses in the European Union. Imports are projected down on reduced demand from Russia.

China production is projected up 1.5 million tons to a record 18.0 million as Hebei province rebounds from last year's severe frost and Xinjiang province experiences a bumper crop. Exports are expected to modestly rebound on higher supplies, spurred by higher shipments to Indonesia. However, COVID-19-related shipping challenges are expected to hinder shipments to other Asia markets, keeping exports at 500,000 tons, a gain of 20,000.

EU production is expected to see a drop of over 25 percent to 1.7 million tons as snow, frost, and cold temperatures impacted crops for several top producer Member States, especially Italy and France. Exports are expected to decline 20 percent to 300,000 tons, a fourth straight year of declines. Lower domestic supplies will propel imports higher to 185,000 tons.

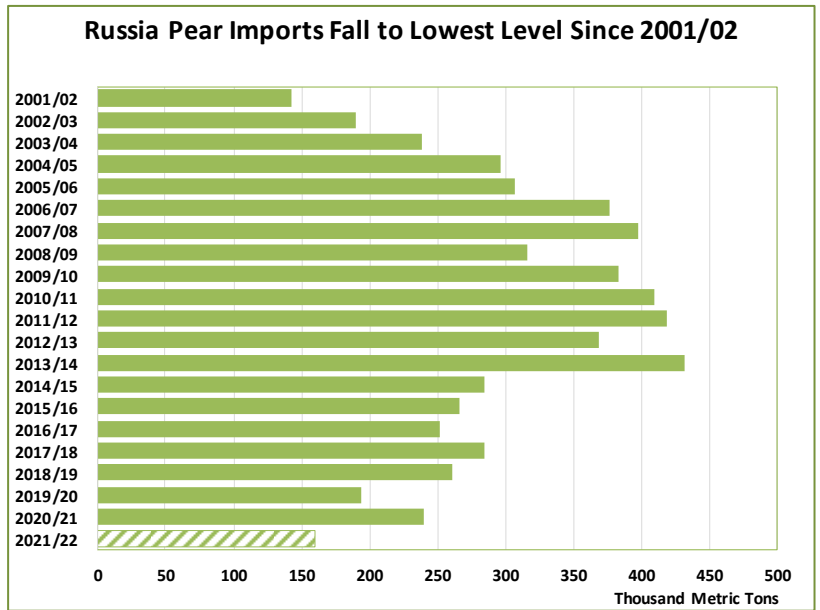
U.S. production is expected to rise 40,000 tons to 633,000, as gains in California and Oregon offset losses in Washington. Both Washington and Oregon saw high temperatures and low rainfall, but late summer rain led to good quality fruit. USDA's NASS surveyed industry and updated U.S. production in the May 2022 *Noncitrus Fruits and Nuts 2021 Summary* report. Exports are projected nearly flat at 107,000 tons as gains to Mexico are offset by reduced shipments to other top markets. Imports are lower at 70,000 tons as higher domestic supplies are anticipated to dampen demand for Southern Hemisphere supplies.

South Africa production is projected up 35,000 tons to 510,000, a third-straight year of record output. New plantings continue to come online, while the season also saw good growing conditions and increased irrigation on good winter rainfall. Higher supplies are expected to lift exports only slightly to 260,000 tons as reduced shipments to Russia dampen greater gains.

Chile production is expected to continue its downward trend, slipping 16,000 tons to 217,000 as acreage shrinks for a fifth consecutive year. Following the decline in production, reduced volumes are expected to pressure exports lower to 110,000 tons.

Argentina production is anticipated to ease slightly to 584,000 tons due to an October frost following very good fruit blossom. Acreage is expected to hold steady after years of decline, but a persistent lack of resources continues to prevent investments to maintain orchards and improve yields. Exports are projected down to 265,000 tons on lower output and reduced shipments to Russia, which typically occur February through June.

Russia imports are projected to drop to their lowest level since 2001/02, plunging over 30 percent to 160,000 tons. Reduced shipments are expected from Argentina and Belarus, more than offsetting gains from Turkey, lowering Russia's rank in world imports from first to third.



For additional information, please contact Elaine Protzman at 202-720-5588, or elaine.protzman@usda.gov

For email subscription, click here to register:

<https://public.govdelivery.com/accounts/USDAFAS/subscriber/new>

To download additional data tables, go to Production, Supply and Distribution Database (PSD Online): (<https://apps.fas.usda.gov/psdonline/app/index.html#/app/downloads>), click on the tab PSD Reports, and click on Fruits and Vegetables.

For FAS Reports and Databases: Current *World Market and Trade* Reports:

<https://apps.fas.usda.gov/psdonline/app/index.html#/app/home> and click on the Reports and Data tab.

For archived *World Market and Trade* Reports:

<https://usda.library.cornell.edu/concern/publications/1z40ks800?locale=en>

For Production, Supply and Distribution Database (PSD Online):

<https://apps.fas.usda.gov/psdonline/app/index.html#/app/home>

For the Global Agricultural Information Network (Agricultural Attaché Reports):

<https://gain.fas.usda.gov/#/>

For Global Agricultural Trade System (U.S. Exports and Imports):

<https://apps.fas.usda.gov/gats/default.aspx>

NOTES

European Union definition: includes 27 countries in the customs union (Austria, Belgium/Luxembourg, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, and Sweden).

Effective January 1, 2021, the separation of the United Kingdom (UK) from the European Union (EU) was complete, including trade between both entities. Starting in December 2021 with the release of 2021/22 data, PSD's for apples, pears, and table grapes reflect EU27 (shown in the PSD system as "European Union") and UK separately. Historical data for both EU27 and the UK is provided for 5 years (2016/17 through 2020/21).

Russia: Due to a cessation of reporting from Russia, production for apples, pears, and table grapes is being carried from the previous year.

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. Southern Hemisphere producer countries of Argentina, Australia, Chile, Peru, and South Africa are on an October-September marketing year; Brazil remains on a calendar year basis 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)

	2017/18	2018/19	2019/20	2020/21	Dec 2021/22	Jun 2021/22
Production						
China	41,390	33,000	42,425	44,066	45,000	45,000
European Union	9,798	14,810	11,480	11,719	11,877	11,877
United States	5,085	4,479	4,852	4,505	4,608	4,336
Turkey	3,032	3,600	3,620	4,300	4,286	4,286
India	1,920	2,371	2,370	2,300	2,300	2,300
Iran	1,937	2,241	2,241	2,241	2,241	2,241
Russia	1,360	1,611	1,779	1,540	1,540	1,540
Brazil	1,203	1,223	1,223	1,223	1,223	1,223
South Africa	836	894	991	1,100	997	1,160
Ukraine	1,462	1,154	1,154	1,154	1,154	1,154
Other	7,184	6,480	6,658	6,465	6,573	6,462
Total	75,206	71,863	78,792	80,613	81,799	81,578
Domestic Consumption						
China	40,172	32,275	41,487	43,033	44,060	44,035
European Union	9,247	13,839	10,659	10,960	11,172	11,142
Turkey	2,844	3,324	3,412	4,013	3,987	3,902
United States	4,212	3,884	4,098	3,836	3,953	3,741
India	1,955	2,384	2,250	2,400	2,580	2,560
Russia	2,156	2,322	2,455	2,259	2,155	2,010
Iran	1,212	1,916	1,423	1,286	1,281	1,306
Brazil	1,207	1,246	1,268	1,175	1,213	1,228
Ukraine	1,426	1,110	1,153	1,148	1,159	1,119
Mexico	1,001	794	1,017	973	1,029	1,044
Other	9,171	8,425	9,012	8,969	8,958	9,122
Total	74,604	71,518	78,235	80,052	81,546	81,208
Imports						
Russia	859	793	763	796	630	480
Iraq	307	329	405	406	415	460
India	249	277	194	377	450	430
United Kingdom	365	343	320	330	350	350
European Union	394	389	378	325	355	335
Egypt	72	271	253	266	300	305
Vietnam	160	158	232	278	280	290
Bangladesh	245	188	271	266	250	265
Mexico	287	247	257	260	250	265
Indonesia	154	150	140	177	195	215
Other	3,209	2,948	3,203	2,891	2,938	2,927
Total	6,302	6,092	6,416	6,370	6,413	6,322
Exports						
European Union	944	1,359	1,199	1,084	1,060	1,070
China	1,281	818	1,042	1,102	1,000	1,030
Iran	725	325	818	956	960	935
United States	1,007	741	861	778	785	715
South Africa	449	469	509	589	565	625
Chile	779	674	660	644	635	610
Turkey	189	278	209	288	300	385
New Zealand	369	391	401	358	380	375
Moldova	264	299	238	147	200	220
Serbia	156	184	206	185	160	145
Other	493	590	469	491	482	444
Total	6,655	6,128	6,611	6,621	6,527	6,554

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)

	2017/18	2018/19	2019/20	2020/21	Dec 2021/22	Jun 2021/22
Production						
China	10,500	9,900	10,800	10,900	11,200	11,200
India	2,800	2,900	2,280	2,300	2,900	2,900
Turkey	2,109	1,950	2,050	2,220	1,940	1,940
Uzbekistan	1,590	1,603	1,603	1,603	1,603	1,603
Brazil	1,592	1,485	1,485	1,485	1,485	1,485
Egypt	1,315	1,350	1,385	1,170	1,435	1,435
European Union	1,448	1,589	1,548	1,371	1,386	1,386
United States	935	997	905	871	905	826
Chile	915	835	785	665	810	765
Peru	623	630	645	687	700	700
Other	1,231	1,107	1,279	1,262	1,252	1,262
Total	25,058	24,347	24,766	24,535	25,617	25,503
Fresh Dom. Consumption						
China	10,464	9,873	10,677	10,665	11,080	11,035
India	2,401	2,356	1,803	1,830	2,282	2,305
European Union	1,792	1,916	1,872	1,762	1,806	1,781
Turkey	1,830	1,771	1,845	2,006	1,710	1,677
Brazil	1,571	1,455	1,443	1,414	1,431	1,448
Uzbekistan	1,463	1,485	1,507	1,487	1,468	1,408
Egypt	1,210	1,235	1,248	1,027	1,273	1,283
United States	1,217	1,199	1,252	1,228	1,315	1,279
Russia	412	307	308	369	391	400
United Kingdom	270	268	275	269	280	275
Other	2,196	2,061	2,120	2,186	2,124	2,168
Total	24,826	23,927	24,350	24,244	25,161	25,060
Imports						
United States	618	571	672	670	700	713
European Union	523	520	501	570	590	560
Russia	387	290	288	351	370	380
United Kingdom	270	268	275	269	280	275
Canada	179	179	190	191	195	185
China	242	262	239	194	210	185
Hong Kong	250	259	238	201	195	130
Bangladesh	51	48	60	106	105	120
Mexico	101	127	91	98	105	115
Kazakhstan	96	78	77	60	75	110
Other	715	751	756	832	777	734
Total	3,432	3,350	3,387	3,543	3,602	3,508
Exports						
Chile	731	655	605	526	645	580
Peru	277	388	400	468	510	530
China	278	289	362	428	330	350
South Africa	279	276	284	322	344	320
Turkey	280	179	205	215	230	265
United States	336	368	325	314	290	260
India	210	250	185	267	280	255
Mexico	196	147	224	207	190	195
Uzbekistan	126	118	96	116	135	195
European Union	179	193	177	179	170	165
Other	571	605	637	580	585	487
Total	3,464	3,467	3,501	3,622	3,709	3,602

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)

	2017/18	2018/19	2019/20	2020/21	Dec 2021/22	Jun 2021/22
Production						
China	16,410	14,000	17,314	16,500	18,000	18,000
European Union	2,361	2,568	2,059	2,381	1,727	1,727
United States	663	726	645	593	605	633
Argentina	580	600	640	615	590	584
Turkey	503	520	530	550	535	535
South Africa	408	413	438	475	425	510
India	280	300	310	308	310	310
Russia	218	242	290	247	247	247
Japan	259	239	239	239	239	239
Chile	262	252	222	233	217	217
Other	687	550	549	483	531	536
Total	22,631	20,410	23,235	22,623	23,424	23,537
Domestic Consumption						
China	15,875	13,645	16,707	16,030	17,479	17,510
European Union	2,096	2,305	1,823	2,181	1,667	1,612
United States	621	654	586	560	569	596
Turkey	459	478	479	477	465	440
Russia	470	461	437	446	466	406
India	267	288	327	330	335	330
Argentina	260	291	300	300	280	319
South Africa	186	188	212	228	180	250
Japan	257	237	237	237	237	237
Indonesia	180	145	236	196	210	235
Other	1,779	1,573	1,702	1,506	1,526	1,548
Total	22,450	20,265	23,047	22,491	23,414	23,484
Imports						
Indonesia	180	145	236	196	210	235
European Union	186	157	172	175	190	185
Russia	285	261	194	240	220	160
Brazil	158	154	138	121	125	120
United Kingdom	124	118	100	105	100	110
Vietnam	87	63	133	97	90	95
Mexico	72	92	84	73	75	80
Hong Kong	73	85	76	81	80	75
United States	79	73	72	75	74	70
Thailand	53	35	60	57	55	65
Other	552	509	554	508	495	464
Total	1,851	1,691	1,818	1,728	1,714	1,659
Exports						
China	543	366	619	480	530	500
European Union	452	420	407	374	250	300
Argentina	320	310	340	315	310	265
South Africa	222	226	227	247	245	260
Chile	129	132	114	127	112	110
United States	122	144	130	109	110	107
Turkey	44	42	51	73	70	95
Belarus	83	70	16	54	50	30
Korea, South	32	27	31	19	25	25
Australia	12	9	9	9	9	9
Other	13	14	15	11	13	12
Total	1,971	1,760	1,959	1,819	1,724	1,713

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.