USDA
June 2021
United States Department of Agriculture Foreign Agricultural Service

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

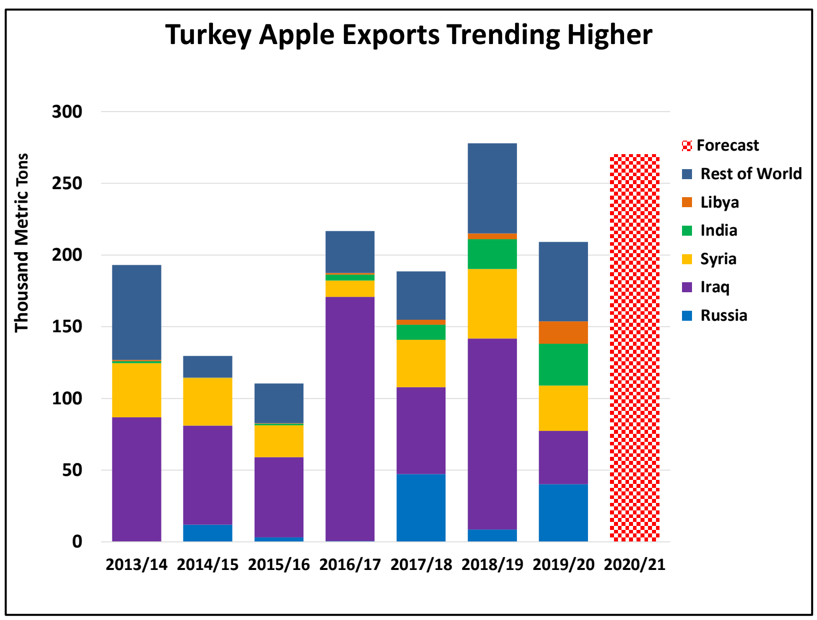
FRESH APPLES

World production for 2020/21 is projected down 3.6 million tons to 75.9 million on a severe spring frost significantly affecting China's northwest provinces. Trade is also forecast down on lower exportable supplies in the European Union and United States.

China production is estimated lower by 1.9 million tons to 40.5 million on a severe spring frost in northern provinces that affected flowering. Although total production is down, higher volumes of lower grade fruit are expected, boosting shipments to price-conscious Southeast Asia markets and lifting exports to 1.1 million tons. Imports are projected over 30,000 tons lower to 70,000 as COVID-19 led to logistical disruptions, generating more cautious buying from importers.

EU production is expected to rise over 500,000 tons to 12.2 million as greater supplies from an on-year in non-commercial orchards more than compensates for losses in weather-affected commercial orchards. Exports are projected down 135,000 tons to 880,000 on fewer commercial supplies, while imports are also expected lower to 460,000 as reduced shipments from Eastern European suppliers more than offsets supplies from the Southern Hemisphere.

Turkey production is projected to surge nearly 700,000 tons to 4.3 million despite some hail in Kayseri and the largest apple production province of Isparta. Overall good growing conditions and plantings of new varieties coming into production are expected to generate a sixth straight year of growth. Higher supplies are expected to boost exports nearly 30 percent to 270,000 tons, especially to Russia and India.



U.S. production is projected down more than 360,000 tons to 4.5 million as lower yields, wildfires, and a windstorm reduced output in Washington, and a severe freeze reduced output in Michigan. USDA's National Agricultural Statistics service (NASS) surveyed industry and updated U.S. production in the May 2021 *Noncitrus Fruits and Nuts 2020 Summary* report. Exports are expected to fall more than 100,000 tons to 750,000 as lower supplies reduce shipments to most export markets. Imports are anticipated to make a slight recovery from last year's record low, rising to 115,000 tons. Gains from Canada and China will more than offset reduced shipments from Southern Hemisphere suppliers.

India production is anticipated to contract slightly to 2.3 million tons on lower output due to variable temperatures, low water supplies during flowering, and hail during fruit-bearing. Quality is also affected by an apple scab outbreak in Himachal Pradesh, the second largest producing state. Imports are projected to surge 90,000 tons to 285,000 mostly on elevated shipments of competitively priced fruit from Iran. Fruit from China has been banned since May 2017, and imports of U.S. apples have fallen nearly 50 percent following the imposition of a 20-percent retaliatory tariff in June 2019. However, the number of countries supplying apples to India doubled from 14 to 28 between 2013/14 and 2018/19 and has remained above 20 since then, with Turkey and Afghanistan gaining market share since 2019/20.

Russia production is anticipated to see a decline of 240,000 tons to 1.5 million after 2 years of strong growth as spring frost and hail impacted commercial orchards while non-commercial orchards experienced an off-year. Commercial orchards continue to be improved as planting area expands with new orchards, and high-density plantings of new trees occur in older orchards. Despite lower output, imports are expected lower to 615,000 tons on drops in shipments from Moldova and Serbia.

Chile production is expected to ease 19,000 tons to 1.1 million as lower summer temperatures, severe January rainfall, and limited labor due to COVID-19 restrictions negatively impacted yield. If realized, this will mark a third straight year of declines. Reduced output is expected to pressure exports lower to 650,000 tons.

South Africa production is projected to rise for the third straight year, reaching 966,000 tons as output gains resulting from good weather and water supplies are only partially offset by damage from hail in the Langkloof region. Growing area continues to expand with new cultivation in the Northern Province that includes plantings of new “low chill” varieties that thrive in warmer temperatures. Higher supplies are anticipated to lift exports to a near-record 530,000 tons.

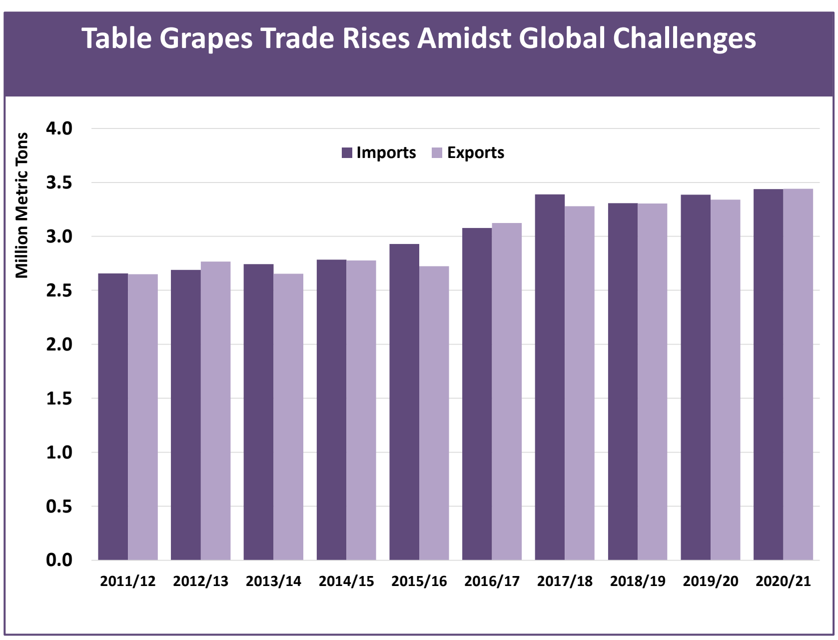
Mexico production is estimated at 680,000 tons, down 80,000 predominantly on adverse weather in Chihuahua during fruit-development. Growers continue to expand acreage, with additional plantings especially in Chihuahua, Durango, and Zacatecas. The new plantings in Chihuahua include new high-density orchards. Despite lower production, imports are expected to contract slightly to 250,000 tons as stocks from last season lessen demand.

New Zealand production is projected to contract 48,000 tons to 543,000 following last year’s record. Hail caused severe damage in the Nelson and Otago regions, cooler summer temperatures impacted fruit size, and severely reduced labor resulted in fewer orchard picks, all combining to bring output to its lowest level since 2016/17. As a consequence, exports are like-wise anticipated to drop to 2016/17 levels, falling 56,000 tons to 345,000.

Table Grapes Clear Multiple Hurdles to Achieve Successful Season

Global trade has faced many challenges this past year due to COVID-19 and its many effects. Agriculture as a whole has had to overcome, and continues to be confronted with, significant transportation challenges as part of the fallout from COVID-19. Included in these are worldwide shipping delays and container shortages, with resultant high shipping costs, while countries also face labor shortages to varying degrees due to COVID-19 measures. Table grapes experienced further obstacles the latter half of the season that made the year even more trying. In Peru, striking workers blocked roads and shipments in Ica in December, hitting growers in the top producing region during Peru's second largest export month. In the midst of Chile's harvest in January, unseasonal and torrential rain caused severe damage in three of the main growing regions. Producer associations in O'Higgins, the largest producing region, reported losses of up to 80 percent. And in March, the cargo ship *Ever Given* ran aground and blocked the Suez Canal, impacting India's exports destined for Europe at the peak of their shipping season. There is also no relief expected from lower volumes. At the world level, COVID-19 doesn't appear to have limited output as losses by some producer countries are being offset by gains in others, keeping production at 24.7 million tons, just below the record level set in 2017/18. If forecasts are realized, this year could also mark the first time Peru surpasses Chile in production.

Adequate supplies are often being met with logistical challenges in getting fruit to import markets, but most major exporters have been able to reach markets, with some even expanding their reach to new destinations. Chile, the United States, and Mexico are the only top producer-exporters anticipated to see reduced shipments, but mostly due to lower supplies. Despite the litany of challenges, the table grape industry has shown great resilience. With steady high volumes, imports and exports are each projected to reach a record of more than 3.4 million tons.



FRESH TABLE GRAPES

World production for 2020/21 is expected to remain almost unchanged at 24.7 million tons as gains in China are nearly offset by weather-related losses in the European Union, Chile, and Turkey. Greater supplies in China and Peru are expected to fuel modest export growth.

China production is estimated to rise 400,000 tons to 11.0 million on improved crop management practices. Efforts are also being directed toward improving fruit quality with increasing numbers of farmers investing in greenhouses and rain shields. Higher output and improved quality are expected to lift exports 58,000 tons to 420,000, continuing China's upward trend, with greater shipments especially to key markets Thailand and Vietnam.

India production is projected nearly flat at 2.3 million tons as growers experience a second straight year of damaging rains, affecting volume and quality. Exports are expected to remain unchanged at 185,000 tons on stable supplies.

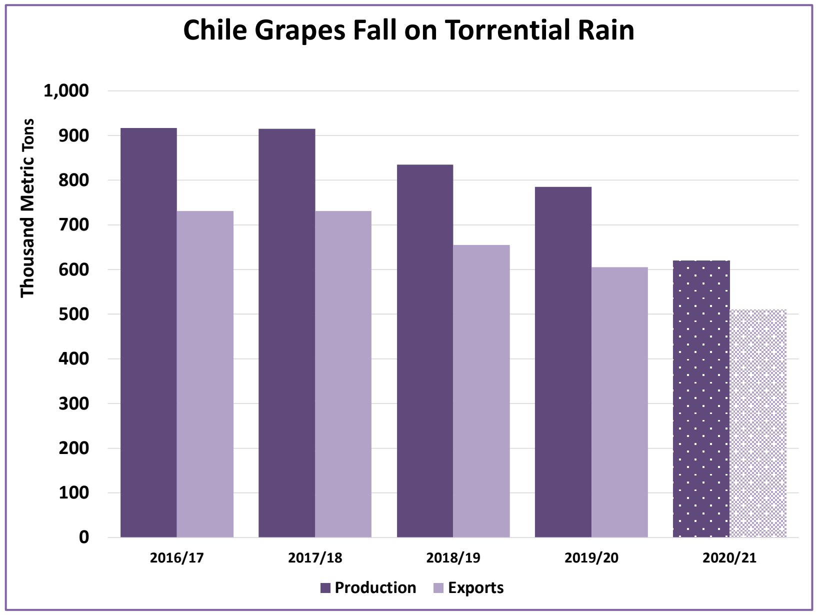
Turkey production is expected to ease 50,000 tons to 2.0 million as summer hail inflicted damage in the Aegean region, the main producing area of seedless grapes. Despite reduced output, exports are anticipated to see a modest improvement, up 10,000 tons to 215,000 on greater shipments to Ukraine and top market Russia.

EU production is expected to fall 170,000 tons to 1.4 million on reduced output in top-producer Italy following damaging spring frost and fall rain and hail. Despite these setbacks, hot summer temperatures are anticipated to yield excellent quality fruit, holding exports steady at 80,000 tons. Imports are projected up to a record 725,000 tons following 2 years of decline on higher shipments from South Africa and Peru.

U.S. production is projected down 34,000 tons to 871,000 on reduced bearing acreage and unfavorable growing conditions. USDA's NASS surveyed industry and updated U.S. production in the May 2021 *Noncitrus Fruits and Nuts 2020 Summary* report. Final trade data shows exports fell 11,000 tons to 314,000, their lowest level since 2009/10, reflecting reduced output and subsequent lower shipments to most top markets. Imports remained nearly unchanged at 670,000 tons as gains in shipments from Peru were offset by weather-reduced volumes from Chile and lower output in Mexico following last year's record crop.

Peru production is projected to maintain its steady upward trend, rising to 665,000 tons on continued good growing conditions and new plantings from previous acreage expansion. If realized, Peru would surpass Chile in production for the first time, though this would likely be temporary due to weather-induced losses in Chile. Higher supplies are expected to boost exports to 470,000 tons, with higher shipments particularly to top markets United States and the European Union.

Chile production is expected to plunge more than 20 percent to 620,000 tons as losses from lower planted area were compounded by heavy and unseasonal rains in January, severely damaging vineyards in the regions of O'Higgins, Valparaiso, and Metropolitana. Combined, these regions account for nearly 70 percent of table grape acreage. Fruit quality was also affected, with the high moisture causing cracking and triggering fungal infections, further reducing exportable supplies and pushing exports down nearly 100,000 tons to a new low of 510,000.



Russia production is expected down slightly to 23,000 tons on a spring drought in parts of southern Russia. Also, investments continue to be made in wine grape production rather than table grapes. Imports are projected up 32,000 tons to 320,000 on higher shipments from Turkey and Uzbekistan.

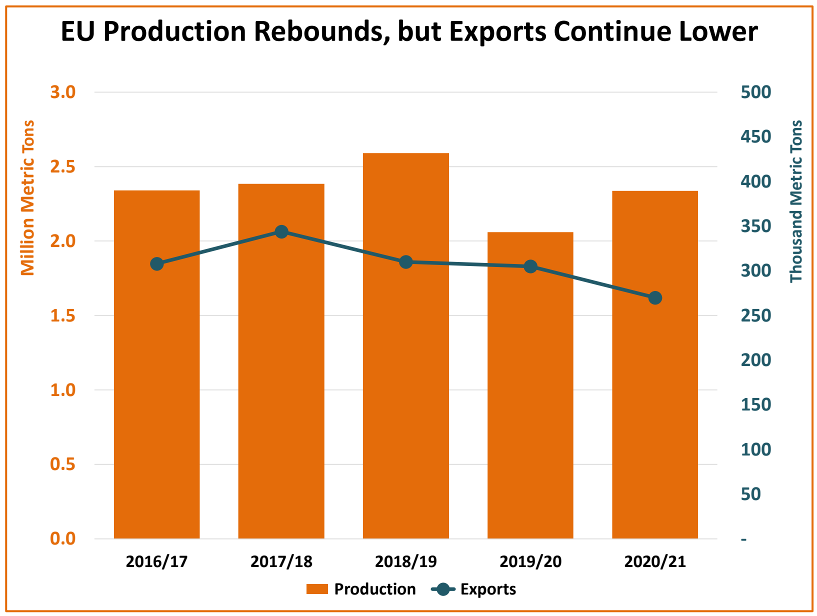
South Africa production is expected to see moderate growth to 330,000 tons on good weather and availability of irrigation water and on improved output from new orchards as high-yield plantings come into production. Area is expanding on new plantings in the Northern Province and on some Western Cape growers transitioning from wine grapes to table grapes. Driven by higher supplies, exports are projected up 27,000 tons to 325,000.

FRESH PEARS

World production for 2020/21 is expected to decline 1.2 million tons to 22.1 million on weather-related losses in China, which are also projected to lower trade.

China production is projected down 1.3 million tons to 16.0 million as output in the main producing region of Hebei Province was reduced following an April frost during fruit development. Lower supplies are expected to slash exports by nearly 25 percent to 470,000 tons. Imports are also expected to contract to 10,000 tons on reduced demand for Western-style pears following several years of modest improvements.

EU production is expected to rebound from last year's weather and pest-related losses, jumping nearly 280,000 tons to 2.3 million. Despite greater output, exports are projected lower to 270,000 tons due to hail and heavy rain in the Iberian Peninsula during flower and fruitset, reducing exportable supplies especially to Brazil. Imports are expected to see modest gains, rising to 190,000 tons.



U.S. production is expected to contract 37,000 tons to 608,000 on lower bearing acreage and yield. USDA's NASS surveyed industry and updated U.S. production in the May 2021 *Noncitrus Fruits and Nuts 2020 Summary* report. Exports are expected lower to 110,000 tons on reduced supplies and slumping demand in Mexico. Imports are also projected down to 71,000 tons on reduced volumes in key suppliers, especially South Korea.

Argentina production is expected to see a slight reduction to 620,000 tons as acreage continues to decline, halting several years of positive growth. Land abandonment persists as smaller producers continue to be pressured by rising costs and lack of investment resources to maintain orchards. Reduced output is expected to edge exports lower to 320,000 tons.

South Africa production is anticipated to remain steady at 410,000 tons on good growing conditions. Growing area continues to recover from pre-drought levels as producers work to replace old trees removed during the drought. Parallel with production, exports are expected to remain firm at 230,000 tons on stable supplies.

Russia production is projected to drop 43,000 tons to 247,000 on weather-related damage in commercial orchards and an off-year in non-commercial orchards as trees recover from last year's large crop. Risk of disease and cold-storage challenges are inclining commercial growers towards apples, but non-commercial growers are showing greater interest in pears, attracted by their higher price. Imports are set to rebound from last year's record low, rising 36,000 tons to 230,000, confirming their status as the world's top importer. Higher shipments from Belarus and Turkey are expected to offset reduced shipments from Southern Hemisphere suppliers.

Chile production is expected to slide 20,000 tons to 202,000 on lower summer temperatures, heavy January rain, and COVID-19-related labor shortages. Exports are expected to see a second year of declines, slipping to 106,000 tons on lower supplies.

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NOTES
European Union definition: 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, Sweden, and United Kingdom. Effective January 1, 2021, the separation of the United Kingdom (UK) from the European Union (EU) was complete, including trade between both entities. For horticultural products (citrus, coffee, deciduous fruit, stone fruit, tree nuts), FAS will continue using the term "European Union" to mean the countries involved in the previous customs union, i.e., EU27+UK, for PSD data through 2020/21. Beginning with 2021/22, data will represent the European Union (not including the United Kingdom) and will exclude all intra-trade. Data sets remaining to be released for 2021/22 are fresh peaches and cherries (September); almonds and walnuts (October); apples, grapes, and pears (December); grapefruit, lemons/limes, oranges, orange juice, and tangerines/mandarins (January 2022); and pistachios (February 2022).

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)

	2016/17	2017/18	2018/19	2019/20	Dec 2020/21	Jun 2020/21
Production						
China	40,393	41,390	33,000	42,425	40,500	40,500
European Union	12,723	10,005	15,029	11,705	12,227	12,227
United States	5,010	5,085	4,479	4,852	4,671	4,490
Turkey	2,926	3,032	3,600	3,620	4,300	4,300
India	2,258	1,920	2,371	2,370	2,300	2,300
Russia	1,509	1,360	1,611	1,779	1,540	1,540
Ukraine	1,076	1,462	1,462	1,462	1,462	1,462
Brazil	1,308	1,195	1,195	1,195	1,195	1,195
Chile	1,310	1,330	1,210	1,124	1,170	1,105
South Africa	902	836	894	942	960	966
Other	7,233	7,945	7,787	8,038	5,805	5,789
Total	76,647	75,559	72,637	79,511	76,131	75,875
Domestic Consumption						
China	39,088	40,172	32,275	41,487	39,380	39,515
European Union	11,568	9,773	14,347	11,192	11,627	11,807
Turkey	2,712	2,844	3,324	3,412	4,051	4,031
United States	4,314	4,212	3,884	4,098	3,976	3,855
India	2,283	1,955	2,384	2,250	2,352	2,382
Russia	2,042	2,156	2,322	2,339	2,273	2,081
Ukraine	1,105	1,426	1,418	1,462	1,457	1,462
Brazil	1,331	1,199	1,218	1,237	1,235	1,180
Mexico	983	1,001	794	1,017	930	924
Belarus	798	864	834	831	830	775
Other	9,485	9,299	9,377	9,775	7,638	7,590
Total	75,708	74,901	72,176	79,102	75,749	75,603
Imports						
Russia	657	859	793	647	810	615
European Union	425	531	493	503	515	460
India	370	249	277	194	240	285
Vietnam	150	160	158	233	250	265
Bangladesh	245	245	188	271	280	260
Egypt	145	72	271	253	250	255
Mexico	267	287	247	257	250	250
Canada	221	222	203	205	205	195
Thailand	175	160	126	172	185	185
Saudi Arabia	192	181	182	195	200	180
Other	3,408	3,099	2,832	2,915	2,487	2,273
Total	6,256	6,064	5,770	5,845	5,672	5,223
Exports						
China	1,376	1,281	818	1,042	1,200	1,055
European Union	1,486	761	1,175	1,015	1,115	880
United States	868	1,007	741	862	815	750
Chile	716	779	674	660	655	650
South Africa	553	449	490	509	510	530
New Zealand	345	369	391	401	390	345
Turkey	217	189	278	209	250	270
Serbia	239	156	184	206	190	165
Moldova	168	264	299	238	230	140
Argentina	78	96	111	109	110	100
Other	628	1,122	762	643	352	373
Total	6,673	6,473	5,922	5,893	5,817	5,258

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)

	2016/17	2017/18	2018/19	2019/20	Dec 2020/21	Jun 2020/21
Production						
China	10,100	10,500	9,900	10,600	11,000	11,000
India	2,784	2,800	2,900	2,280	3,000	2,300
Turkey	1,991	2,109	1,950	2,050	2,000	2,000
Brazil	1,743	1,592	1,592	1,592	1,592	1,592
Uzbekistan	1,626	1,590	1,590	1,590	1,590	1,590
Egypt	1,280	1,315	1,350	1,385	1,420	1,420
European Union	1,718	1,448	1,589	1,573	1,403	1,403
United States	943	935	997	905	1,020	871
Peru	611	623	630	653	665	665
Chile	917	915	835	785	785	620
Other	1,069	1,128	1,041	1,210	1,216	1,216
Total	24,783	24,955	24,374	24,623	25,690	24,676
Fresh Dom. Consumption						
China	10,081	10,464	9,873	10,477	10,800	10,790
European Union	2,280	2,057	2,192	2,172	2,008	2,048
India	2,358	2,401	2,356	1,803	2,600	1,892
Turkey	1,818	1,830	1,771	1,845	1,800	1,785
Brazil	1,723	1,572	1,562	1,550	1,554	1,537
Uzbekistan	1,528	1,463	1,472	1,494	1,485	1,475
Egypt	1,275	1,300	1,325	1,360	1,370	1,370
United States	1,189	1,217	1,199	1,252	1,365	1,227
Russia	228	412	307	307	329	338
Mexico	176	224	236	273	279	276
Other	1,836	1,924	1,780	1,832	1,848	1,705
Total	24,492	24,865	24,073	24,366	25,437	24,444
Imports						
European Union	649	688	682	677	680	725
United States	593	618	571	672	650	670
Russia	212	387	290	288	310	320
China	237	242	262	239	220	210
Hong Kong	229	250	259	238	235	210
Canada	176	179	179	189	190	190
Vietnam	74	101	100	112	125	145
Thailand	157	143	124	131	140	140
Egypt	85	100	110	125	120	120
Indonesia	68	81	112	94	95	90
Other	598	600	619	623	628	619
Total	3,078	3,389	3,307	3,386	3,393	3,439
Exports						
Chile	731	731	655	605	620	510
Peru	311	277	388	400	415	470
China	257	278	289	362	420	420
South Africa	304	279	276	298	305	325
United States	347	336	369	325	305	314
Turkey	173	280	179	205	200	215
Mexico	156	196	147	224	200	205
Hong Kong	212	214	226	205	200	195
India	200	210	250	185	180	185
Australia	107	110	146	153	170	170
Other	326	368	381	379	399	431
Total	3,123	3,279	3,304	3,340	3,414	3,440

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)

	2016/17	2017/18	2018/19	2019/20	Dec 2020/21	Jun 2020/21
Production						
China	15,960	16,410	14,000	17,314	16,000	16,000
European Union	2,340	2,384	2,591	2,061	2,337	2,337
Argentina	540	580	600	640	610	620
United States	668	663	726	645	720	608
Turkey	472	503	520	530	550	550
South Africa	432	408	413	407	410	410
India	340	280	3,000	310	300	305
Japan	275	259	259	259	259	259
Russia	236	218	242	290	247	247
Chile	290	262	252	222	213	202
Other	609	665	571	570	512	526
Total	22,161	22,633	23,174	23,248	22,157	22,063
Domestic Consumption						
China	15,458	15,875	13,645	16,707	15,461	15,540
European Union	2,240	2,240	2,449	1,939	2,202	2,257
United States	615	621	654	586	680	569
Turkey	456	459	478	479	495	480
Russia	445	470	461	436	401	435
India	333	267	2,988	327	320	325
Argentina	261	260	291	300	290	300
Japan	273	257	257	257	257	258
Indonesia	155	180	145	236	200	185
South Africa	166	186	188	181	190	180
Other	1,527	1,612	1,461	1,588	1,553	1,446
Total	21,930	22,427	23,017	23,038	22,049	21,975
Imports						
Russia	252	285	261	194	195	230
European Union	208	200	168	183	170	190
Indonesia	155	180	145	236	200	185
Brazil	156	158	154	136	140	130
Belarus	152	133	118	119	125	110
Vietnam	78	88	63	130	135	105
Hong Kong	68	73	85	76	80	80
United States	73	79	73	72	70	71
Mexico	67	72	92	84	80	70
Canada	64	64	66	60	65	63
Other	379	386	345	404	414	383
Total	1,652	1,719	1,568	1,693	1,674	1,617
Exports						
China	509	543	366	619	550	470
Argentina	280	320	310	340	320	320
European Union	308	344	310	305	305	270
South Africa	266	222	226	227	220	230
United States	126	122	144	130	110	110
Chile	152	129	132	114	110	106
Turkey	16	44	42	51	55	70
Belarus	92	83	70	16	25	50
Korea, South	26	32	27	31	25	20
Australia	9	12	9	9	9	9
Other	18	13	14	15	12	9
Total	1,800	1,864	1,650	1,856	1,741	1,664

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.