United States Department of Agriculture

Foreign Agricultural Service

June 2018

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

FRESH APPLES

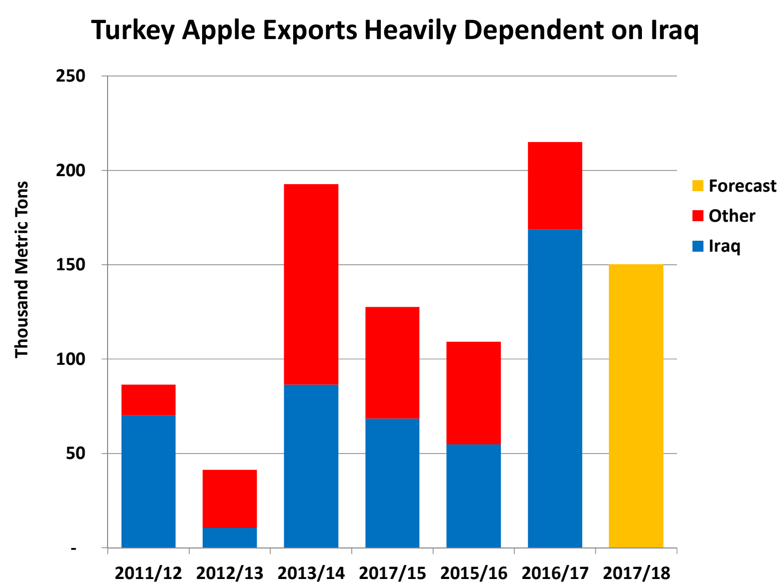
World production for 2017/18 is forecast down 2.7 million metric tons (tons) to 77.3 million due to early spring frosts severely affecting orchards throughout the European Union. Smaller supplies are expected to draw consumption down to 65.7 million tons and to lower global trade.

China's production is projected to continue its upward trend, rising 600,000 tons to 44.5 million as higher output in the western provinces more than offsets losses in the north caused by prolonged heat and drought. Although larger supplies boost processing 600,000 tons to 5.0 million, consumption is forecast to remain nearly flat. India's ban on apples from China in May 2017 following detection of pests is expected to drive China's exports down to 1.2 million tons. Imports are forecast to remain flat at 70,000 tons.

EU production is forecast at its lowest since 2007, dropping 20 percent to 10.0 million tons. Sustained high temperatures in July on top of severe frost in April 2017 and an early March bloom significantly impacted production across the European Union, especially top growers Poland and Italy. Lower supplies are expected to cause significant changes in trade: exports are projected down sharply by 45 percent to 820 million tons, and imports are expected up nearly 20 percent to 500,000 tons. Despite higher imports, consumption is forecast down to 6.4 million tons as Southern Hemisphere suppliers cannot completely offset reduced domestic supplies.

U.S. production is projected to slip 260,000 tons to 4.7 million due to freeze during bloom in Michigan and lower production in top growing western states, including Washington. Despite lower output, exports are expected to rise 15 percent to 995,000 tons on higher shipments to India as U.S. apples displace China's. Imports are projected nearly flat at 170,000 tons as a reduction from Canada earlier in the marketing year is expected to be offset by supplies from Chile.

Turkey's production is forecast down slightly to 2.8 million tons due to damage from hail in the main growing regions of Central Anatolia and Mediterranean. Exports are expected to drop 30 percent to 150,000 tons as gains in shipments to Russia only partially offset losses to Iraq.



Approved by the World Agricultural Outlook Board/USDA

India's production is forecast up slightly on favorable growing conditions, rising to 2.3 million tons. Imports are expected to drop to 250,000 tons, down 120,000 from last year's record, as significantly higher shipments from the United States are not expected to fully replace banned supplies from China.

Chile's production is expected to slip 40,000 tons to 1.3 million. New plantings have yet to reach full production, but good growing conditions improved the fruit quality over last season. Despite lower supplies, exports are forecast up, to 730,000 tons, on higher volumes of export-quality fruit.

Russia's production is estimated to fall 230,000 tons to 1.3 million due to freeze during bloom in the central Federal District. Higher shipments from Moldova and China are expected to drive imports up nearly 30 percent to 850,000 tons. Russia remains the top importer despite the continued ban on apples from certain countries, including former top supplier European Union.

Mexico's production is projected flat at 720,000 tons as adverse weather conditions inhibit output in the main growing state of Chihuahua. Imports are expected to rise to 300,000 tons on higher shipments from top supplier United States.

Argentina's production is expected to continue its downward trend, slipping 30,000 tons to 530,000 as hail and a lighter bloom result in lower yields. Despite lower supplies, a slight recovery in exports is expected, rising to 90,000 tons on higher shipments to Northern Hemisphere markets. Fresh consumption is forecast to remain steady as fewer supplies go to processing.

New Zealand's apple production is forecast up nearly 40,000 tons to 560,000 as dry and warm weather during the harvest is expected to nullify the effects of two cyclones and heightened early season rain and warmth. Demand in India and strong prices in the European Union are expected to support shipments, raising exports to a record 375,000 tons.

South Africa's production is projected down 100,000 tons to 800,000 as limited water and adverse weather affected both yield and fruit quality. Exports are forecast down 68,000 tons to 485,000 on lower levels of export-quality supplies.

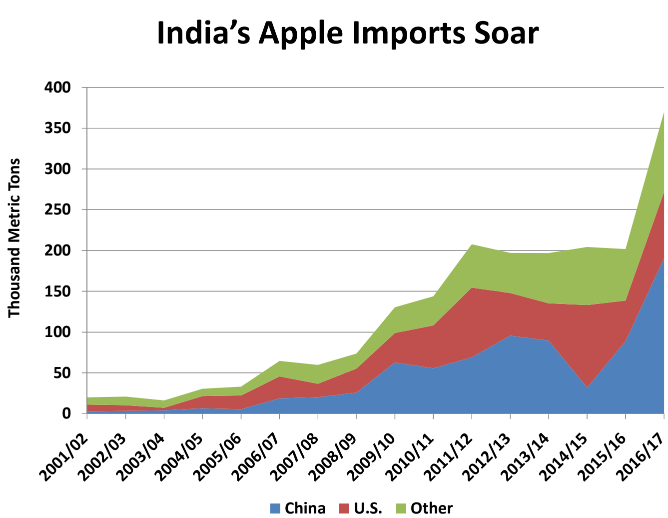
FEATURE ARTICLE

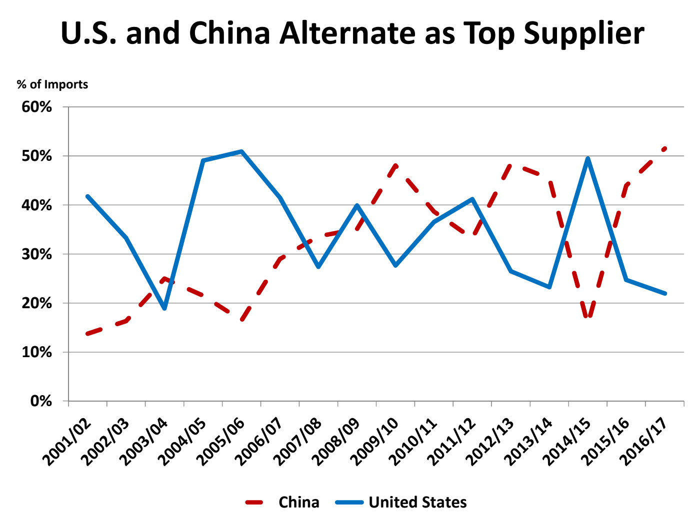
India's Apple Situation from FAS Field Travel

India is currently the fifth-largest apple producer in the world, averaging 2.3 million metric tons over the last 10 years. Apples are grown in the Himalayan mountain states of Jammu and Kashmir and Himachal Pradesh, and account for approximately 60 percent and 40 percent of production, respectively. The main variety grown is Red Delicious, first brought to Himachal Pradesh from the United States in the early 1900's. As reported by India's PHD Chamber of Commerce and Industry, agriculture as a whole provides employment to over 60 percent of the populations of the two states, and apples play a key role. They account for almost 50 percent of Jammu and Kashmir's land area, and represent 80 percent of total fruit production in Himachal Pradesh.

The highest quality domestically grown variety is Kinnour, a cross between Red and Golden Delicious. It is a sweet, juicy apple, and a local saying has it that "if you don't get wet eating it, it's not a Kinnour." However, Red Delicious has become the most prevalent, both domestically and through imports, and it has become the de-facto standard by which other varieties are measured for color, shelf-life, firmness of flesh, and flavor.

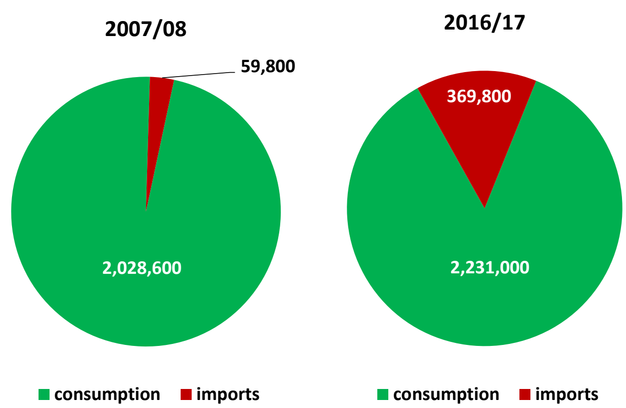
Expanding apple output from current levels is constrained by lower-yielding varieties, limited growing area, transportation, and post-harvest losses, preventing India from fulfilling domestic demand. Climate requirements limit the growing areas to Jammu and Kashmir and Himachal Pradesh. Prohibitive transportation costs and difficult roads prevent effective country-wide distribution. In the southern states, where apples enter through the west coast port of Mumbai and the east coast port of Chennai, transportation by sea from foreign suppliers is more economical than domestic apples arriving overland, resulting in a population more familiar with imported apples. As a result, this has created a region where high-quality imports face less competition from domestically grown apples.





Perhaps the greatest obstacle facing the domestic industry is the post-harvest losses in terms of quantity and quality due to handling practices and lack of controlled atmosphere (CA) facilities. Domestic apples start their journey in overpacked wooden or cardboard boxes and are then loaded onto unrefrigerated trucks to travel from the cool mountain states down to wholesale markets where CA storage is in short supply, but temperatures can rise above 90 degrees. They are then unloaded, sorted, and repackaged for sale to retailers. It is estimated that nearly 70 percent of production is first transported south to Chandigarh, which does have some CA facilities, before then being redistributed to other cities; roughly 70 percent goes onwards to Delhi. In contrast, imported apples are in CA from the day they are picked until at least when they depart the port of arrival. Many importers continue to provide CA as the apples make their way from the port of arrival and through the wholesale markets to the retail outlets, but at this juncture the CA chain often breaks. Nearly 90 percent of retail sales occur via "unorganized" or independent stores, most of which rarely have CA facilities. Despite the length of time in transit, the handling of imported apples up to this point in the supply chain then enables the fruit to last several days even in the uncontrolled temperatures of the markets.

India's Imports Growing as Percentage of Consumption



Amidst this situation, imports started making significant inroads into the market in 2001/02, extending the availability and thus the time-frame of consumption. Imports start arriving towards the end of the domestic harvest, resulting in a year-round presence of apples. This year-round presence has raised consumer awareness, which in turn is boosting demand beyond the domestic season (August-March). In the last 10 years, total imports have risen sixfold, rising from 60,000 tons to a record 370,000 in 2016/17, with China and the United States alternating as the top supplier (though imports in 2017/18 are expected to drop to 350,000 tons; see story above). At the same time, imports' share of consumption has risen from 3 percent to 14 percent.

But demand has not only benefitted imports. Just as a rising tide lifts all boats, the success of high quality imports is forcing the market to get more competitive, leading to improvements in the domestic industry as growers see that higher quality apples can successfully receive higher prices. Management of orchards is also shifting to a younger generation, and India is now seeing efforts to replace old orchards with newer, better varieties and greater interest in cold storage and new management practices. Trade sources suggest that this will also benefit imports, as it will raise domestic awareness of these new varieties and improve overall demand. It is estimated that Red Delicious currently makes up about 90 percent of total imports, though the presence of other varieties is increasing.

The presence of CA facilities is on the rise. Retailers at all levels see the success of high-quality imported fruit. It is a significant investment, but more are seeking the benefits of long-term gains over short-term losses. Availability of fresh fruit is also expanding outside of the unorganized retailers as the presence of modern retail outlets continues to expand. Making their first appearance in 2005, there are now over 4,800 supermarkets and 500 hypermarkets across India.

The outlook for apples in India is very bright, and trade is the driving force. While fresh fruit sales have continued to grow, reaching $60 billion in 2016, the popularity of apples continues to rise. Apples have become a diet staple due to year-round availability, younger generations being open to spending more on health and nutrition, and demand spreading and expanding beyond the large cities. And as imports have grown, reciprocal improvements are occurring in domestic fruit handling, storage, and quality. Apples are on the rise in India, and offer great opportunities for both domestic growers and foreign suppliers.

FRESH TABLE GRAPES

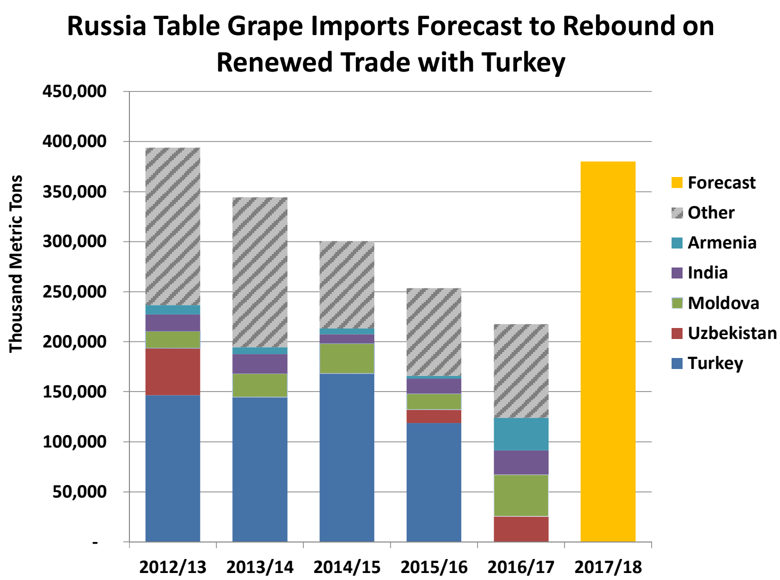
World production is forecast flat at 24.3 million tons as growth in China and India counters weather-related losses in the European Union and Turkey. Exports and imports are expected to rise as trade resumes between Turkey and Russia following Russia's lifting of its ban on Turkey's grapes.

China's production is projected to rise a modest 4 percent to 11.2 million tons on good growing conditions. After 16 years of rapid expansion, growing area appears to have stabilized at approximately 800,000 hectares. Crop management practices have also improved, resulting in higher-quality fruit that has prompted higher prices. Larger supplies are expected to boost exports to 280,000 tons as higher shipments to Vietnam and Indonesia offset losses to price-sensitive Thailand. Imports are forecast down for the second straight year, easing 22,000 tons to 215,000 on lower shipments from Southern Hemisphere suppliers.

India's production is estimated to rise 216,000 tons to 3.0 million on good growing conditions. However, exports are forecast nearly flat at 200,000 tons as reduced shipments to Bangladesh more than offset gains to the European Union, its top market.

Turkey's production is forecast down 230,000 tons to 2.1 million tons on frost- and hail-damaged crops in the Aegean Region. In spite of smaller supplies, exports are expected to rebound to a record 280,000 tons on renewed shipments to Russia following the May 2017 lifting of the ban on Turkey grapes.

Russia's imports are projected to rebound sharply on resumed trade with Turkey, rising nearly 80 percent to 380,000 tons, the highest level since 2012/13. Russia instituted a ban on Turkey's fresh produce in January 2016, which was lifted for grapes in May 2017, restoring trade with its historically top table grape supplier.



EU production is projected down 216,000 tons to 1.45 million due to heavy autumnal rain in the top growing Member State, Italy. Exports are expected to ease 10,000 tons to 79,000 on lower shipments to Africa and Middle East markets. Imports are forecast to contract slightly to 635,000 tons on reduced deliveries from main supplier South Africa. Consumption continues its downward trend on smaller supplies both domestically and from Southern Hemisphere suppliers.

U.S. production is expected to decline slightly to 935,000 tons as sustained high heat in the summer affected yield. Final trade data shows exports were nudged lower to 336,000 tons as shipments remained flat to top markets Canada and Mexico and fell slightly to Asian markets. Imports rose to a record 618,000 tons on strong trade with Mexico, the majority of which occurs early in the May-April marketing year.

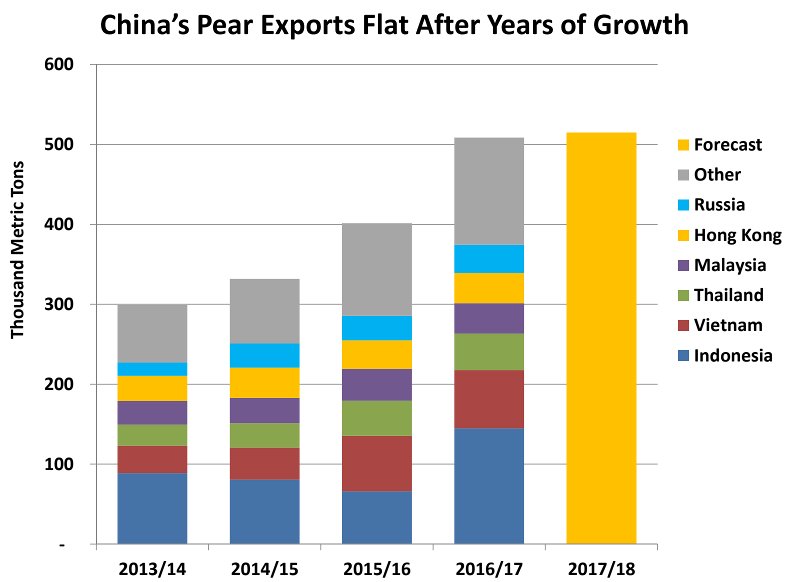
Chile's production is forecast to remain nearly unchanged at 900,000 tons as abundant rainfall, sufficient chill hours, and good spring growing conditions offset losses from gradually declining acreage. Exports are expected to follow production, remaining steady at 720,000 tons. Table grape growers are facing declining profits in export markets as demand dwindles for the varieties currently grown, making Chile less competitive with other producers growing newer varieties.

Peru's production is expected to rise slightly to 638,000 tons as new plantings continue to come into production and as maturing vines generate higher yield. Despite greater supplies, exports are forecast down 30,000 tons to 280,000 on lower availability of export-quality grapes following flooding and drought in 2017.

FRESH PEARS

World production is forecast to remain nearly flat at 25.0 million tons as gains in China offset losses in other top producer countries. Exports are expected to remain steady at 1.8 million tons, while imports are projected up slightly to 1.7 million on higher shipments from top suppliers European Union and Argentina.

China's production is estimated to rise slightly to 19.0 million tons as bumper harvests in middle and western provinces offset heat- and drought-induced losses in eastern provinces. Exports are forecast nearly flat at 515,000 tons on lower trade with Asian markets as India continues its May 2017 ban on China's pears and as higher prices on good-quality fruit are expected to dampen demand. China exports most of its pears to price-sensitive Asian markets.



EU production is expected to remain steady at 2.3 million tons as gains in southern Member States offset losses in northern Member States. Additional production in the south is expected to raise exports 40,000 tons to 350,000 on elevated shipments to Brazil and Morocco. Imports are nearly unchanged at 215,000 tons on stable domestic supplies and smaller production in top supplier South Africa.

U.S. production is estimated to ease 30,000 tons to 640,000 on lower yield in top growing state Washington. Following production, exports are projected slightly lower to 120,000 tons on lower exports to top markets Canada and United Arab Emirates. Imports are forecast up to 85,000 tons as smaller supplies prompts higher shipments from all top suppliers.

Argentina's production is expected to slip 10,000 tons to 530,000 tons as hail damage lowers output. This would mark Argentina's fifth straight year of decline. Despite reduced domestic supplies, exports are forecast slightly upward to 290,000 tons on higher demand in Northern Hemisphere markets.

Chile's production is projected down to 270,000 tons on lower output during a biennial off-year. Following production, exports are forecast down 12,000 tons to 140,000 as shipments to the European Union decline on reduced supplies.

South Africa's production is forecast down 32,000 tons to 400,000 as limited water and adverse weather affected both yield and fruit quality. Lower supplies of export-quality fruit are expected to reduce exports 32,000 tons to 240,000.

Russia's production is expected to drop almost 20 percent to 189,000 tons due to unfavorable growing conditions. Despite lower supplies from Belarus, imports are projected up 13,000 tons to 265,000 as higher demand spurs greater shipments from Argentina, Turkey, and China.

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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. As of this report, the Southern Hemisphere country of Peru is now on an October-September marketing year, along with Argentina, Chile, and South Africa.

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.

Note: The Foreign Agricultural Service (FAS) did not update the 2017/18 production forecast for the United States in this scheduled report. In October 2017, the National Agricultural Statistics Service (NASS) indicated it would not publish the *Noncitrus Fruits and Nuts 2017 Preliminary Summary*, which would have provided updated U.S. production data. NASS will publish final 2017/18 U.S. production data in the July *Noncitrus Fruits and Nuts 2017 Summary*, and FAS will publish the final 2017/18 U.S. production data in the December issue of *Fresh Deciduous Fruit: World Markets and Trade (Apples, Grapes, & Pears)*. http://www.nass.usda.gov/Newsroom/Notices/2016/01_07_2016.php

The next publication of this circular will be on December 7, 2018.

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

(1,000 Metric Tons)

	2013/14	2014/15	2015/16	2016/17	Dec 2017/18	Jun 2017/18
Production						
China	39,680	40,920	42,600	43,900	44,500	44,500
European Union	11,865	13,636	12,453	12,591	10,021	10,021
United States	4,690	5,067	4,521	4,912	4,653	4,653
Iran	2,412	2,500	2,799	2,800	1,573	2,800
Turkey	2,930	2,289	2,740	2,900	2,750	2,750
India	2,498	2,498	2,520	2,258	2,300	2,300
Russia	1,417	1,409	1,311	1,509	1,277	1,277
Chile	1,310	1,210	1,335	1,310	1,360	1,270
Ukraine	1,085	1,180	1,099	1,099	1,100	1,099
Brazil	1,379	1,265	1,049	1,049	1,045	1,049
Other	5,735	5,688	5,731	5,659	5,630	5,535
Total	75,001	77,661	78,158	79,988	76,208	77,254
Fresh Dom. Consumption						
China	34,920	37,040	37,526	38,189	38,380	38,370
European Union	7,353	7,781	7,544	7,706	6,319	6,399
Turkey	2,639	2,064	2,532	2,576	2,441	2,491
United States	2,498	2,702	2,538	2,730	2,544	2,434
India	2,662	2,681	2,311	2,231	2,245	2,150
Iran	2,207	2,213	2,365	2,567	1,273	2,100
Russia	2,116	1,803	1,646	1,583	1,575	1,735
Other	9,462	9,798	10,227	10,243	9,803	10,003
Total	63,857	66,080	66,689	67,825	64,580	65,682
For Processing						
China	3,850	3,200	4,000	4,400	5,000	5,000
European Union	3,562	4,139	3,601	3,728	3,301	3,301
United States	1,562	1,492	1,393	1,485	1,394	1,394
Russia	459	370	335	459	337	337
Chile	295	332	320	310	321	300
Argentina	250	300	230	232	206	190
Canada	149	151	142	169	155	155
Other	901	771	740	529	535	515
Total	11,028	10,754	10,760	11,312	11,249	11,192
Imports						
Russia	1,254	820	746	657	690	850
European Union	622	400	451	424	600	500
Iraq	189	202	296	238	220	360
Mexico	227	314	218	267	250	300
Belarus	278	724	657	544	450	250
India	197	204	202	370	350	250
Bangladesh	148	151	204	245	185	230
Canada	222	217	230	221	224	220
United Arab Emirates	189	224	212	191	195	195
Afghanistan	18	11	83	70	0	190
Other	2,642	2,827	3,064	2,953	2,727	2,725
Total	5,985	6,096	6,362	6,181	5,891	6,070
Exports						
China	934	748	1,151	1,381	1,200	1,200
United States	843	1,037	778	868	890	995
European Union	1,573	1,792	1,590	1,488	1,000	820
Chile	820	628	765	716	780	730
Iran	206	288	435	233	300	700
South Africa	382	466	511	553	500	485
New Zealand	308	329	347	345	376	375
Serbia	143	153	233	239	230	150
Turkey	193	128	109	215	200	150
Argentina	144	106	91	78	80	90
Other	460	868	492	393	340	380
Total	6,006	6,542	6,502	6,510	5,896	6,075

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. Data for Afghanistan was inadvertently omitted from the December publication.

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

(1,000 Metric Tons)

	2013/14	2014/15	2015/16	2016/17	Dec 2017/18	Jun 2017/18
Production						
China	8,085	8,800	10,000	10,800	11,200	11,200
India	2,585	2,823	2,590	2,784	3,000	3,000
Turkey	2,200	2,350	2,005	2,350	2,120	2,120
Uzbekistan	1,579	1,580	1,580	1,580	nr	1,580
European Union	1,816	1,638	1,753	1,666	1,450	1,450
Brazil	1,454	1,497	984	980	970	980
United States	1,013	955	947	943	935	935
Chile	1,055	939	868	916	920	900
Peru	500	500	540	605	638	638
Mexico	260	247	282	256	290	290
Other	1,116	1,266	1,190	1,240	1,220	1,210
Total	21,663	22,596	22,740	24,120	22,742	24,302
Fresh Dom. Consumption						
China	8,212	8,899	10,022	10,780	11,225	11,135
India	2,448	2,752	2,220	2,356	2,483	2,555
European Union	2,241	2,131	2,280	2,227	2,011	2,006
Turkey	1,997	2,094	1,831	2,178	1,901	1,841
Uzbekistan	1,560	1,521	1,474	1,483	nr	1,454
United States	1,117	1,113	1,150	1,189	1,225	1,218
Brazil	1,460	1,495	981	960	960	964
Russia	407	389	346	304	424	479
Peru	273	222	231	288	250	348
Korea, South	329	334	316	317	328	318
Other	1,605	1,531	1,563	1,620	1,584	1,635
Total	21,647	22,481	22,414	23,703	22,391	23,952
Imports						
European Union	577	604	615	649	647	635
United States	519	547	530	593	620	618
Russia	349	302	256	212	325	380
Hong Kong	210	215	232	229	225	230
China	231	226	249	237	250	215
Canada	180	175	171	176	178	180
Thailand	87	89	131	157	140	145
Vietnam	51	51	76	75	90	103
Kazakhstan	28	67	100	81	80	95
Indonesia	46	48	49	68	60	80
Other	378	362	336	390	367	349
Total	2,655	2,686	2,744	2,866	2,982	3,030
Exports						
Chile	728	761	688	730	733	720
United States	416	389	328	347	330	336
China	104	127	227	257	225	280
Peru	228	280	297	311	380	280
Turkey	204	257	175	173	220	280
South Africa	226	264	255	304	258	250
India	142	76	160	202	272	200
Mexico	150	152	164	156	195	195
Hong Kong	164	172	190	212	200	190
Australia	80	84	110	107	130	140
Other	213	216	238	237	128	247
Total	2,655	2,777	2,830	3,034	3,071	3,118

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, Chile, Peru, and South Africa are on an October-September marketing year, and Australia and Brazil are on a calendar year indicated as the second year of the split year. Some countries may include raisin-type and/or table-type grapes. The abbreviation "nr" (not reported) indicates there was no data for that country when it was published in December 2017.

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

(1,000 Metric Tons)

	2013/14	2014/15	2015/16	2016/17	Dec 2017/18	Jun 2017/18
Production						
China	17,300	18,000	18,700	18,700	19,000	19,000
European Union	2,523	2,566	2,513	2,340	2,336	2,336
United States	795	754	729	668	640	640
Argentina	690	590	580	540	600	530
Turkey	415	305	415	440	420	420
South Africa	414	411	430	432	405	400
India	317	317	323	352	350	350
Japan	295	277	278	278	295	278
Chile	267	290	267	290	296	272
Korea, South	282	303	261	238	247	247
Other	502	552	536	618	558	572
Total	23,800	24,364	25,031	24,895	25,147	25,045
Fresh Dom. Consumption						
China	15,506	16,028	16,601	16,478	16,776	16,743
European Union	2,008	2,027	2,048	1,943	1,968	1,935
Russia	528	400	397	390	385	395
United States	409	414	390	406	385	390
Turkey	392	282	381	414	393	370
India	333	335	299	332	328	313
Japan	294	276	277	277	294	276
Korea, South	258	273	228	205	214	211
Brazil	227	200	162	171	201	185
Indonesia	96	86	92	155	165	165
Other	1,087	1,180	1,220	1,235	1,259	1,266
Total	21,137	21,501	22,094	22,006	22,368	22,248
For Processing						
China	1,500	1,650	1,700	1,720	1,750	1,750
European Union	300	294	356	296	264	264
United States	265	255	262	209	215	215
Argentina	186	153	170	160	200	150
South Africa	158	160	132	119	112	117
Chile	65	58	56	57	57	57
Russia	20	9	9	55	37	37
Turkey	10	7	10	10	10	10
India	0	0	7	8	8	8
Korea, South	0	6	10	7	6	6
Other	36	6	6	7	6	6
Total	2,539	2,599	2,718	2,649	2,666	2,621
Imports						
Russia	431	265	267	252	255	265
European Union	255	221	224	209	207	215
Brazil	208	179	147	156	185	170
Indonesia	96	86	92	155	165	165
Belarus	60	186	151	152	143	150
United States	82	89	79	73	80	85
Vietnam	37	43	73	79	85	85
Other	531	567	587	580	580	593
Total	1,700	1,637	1,620	1,655	1,700	1,728
Exports						
China	299	332	407	509	480	515
European Union	470	417	310	309	309	350
Argentina	409	333	310	280	280	290
South Africa	207	205	250	272	250	240
Chile	117	144	129	152	155	140
United States	203	175	156	126	120	120
Belarus	38	163	122	92	85	85
Other	65	67	74	70	66	95
Total	1,808	1,836	1,759	1,807	1,745	1,835

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.