United States Department of Agriculture Foreign Agricultural Service

September 2021

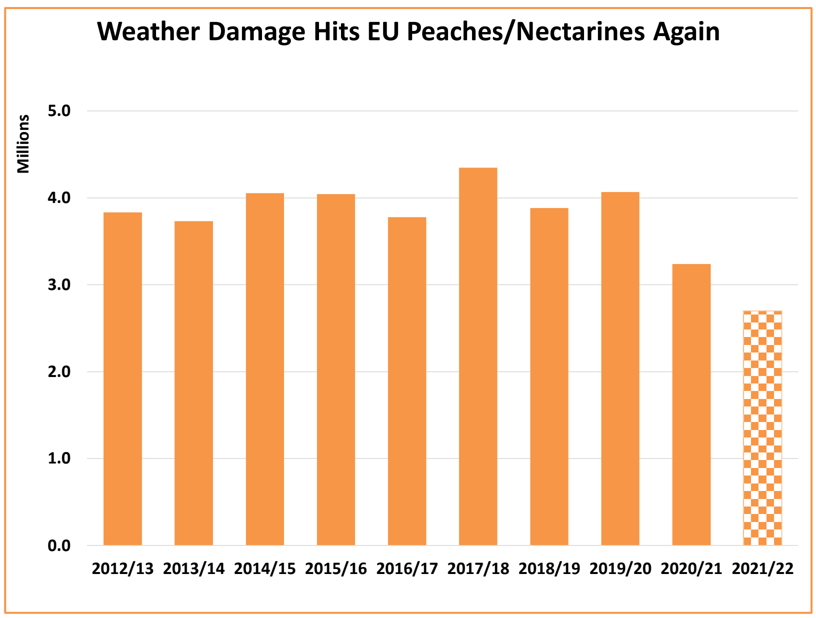
Fresh Peaches and Cherries: World Markets and Trade

FRESH PEACHES/NECTARINES

World peach and nectarine production for 2021/22 is forecast to edge up slightly to 21.8 million metric tons (tons) as China supplies recover from last year's weather-related losses, more than offsetting weather-related losses in the European Union and Turkey. Exports are projected lower as reduced shipments from China and Uzbekistan more than offset gains from the United States.

China production is expected to rebound from last year's snow-damaged crop, rising 1.0 million tons to 16.0 million. Despite higher supplies, exports are forecast down 23,000 tons to 55,000. Coupled with weak demand from top market Vietnam, shipments to Kazakhstan have yet to recover despite the lifting of a ban on China stone fruits due to detection of quarantine pests. After several years of growth, imports are also expected to ease to 36,000 tons as higher costs and quarantine requirements for cold-chain products deter importers.

EU production is forecast down 539,000 tons to 2.7 million as growers in leading Member States Spain, Italy, Greece, and France experienced a second straight year of destructive frost and rain. Spain and Italy also continue to reduce planted area to further combat over-supply and relieve downward pressure on prices. Reduced supplies are expected to prolong trends of lower exports and higher imports, with exports down to 175,000 tons and imports up to 40,000.



U.S. production is projected up 60,000 tons to 716,000, holding fairly steady for the fourth straight year following consecutive years of decline from 2010/11 through 2018/19. All main producer states are expected to show higher output with East Coast states recovering from last year's freezes. USDA's National Agricultural Statistics Service (NASS) surveyed industry and published the U.S. forecast for peach production in the August 2021 *Crop Production* report. Exports are forecast at 72,000 tons as improved supplies drive greater shipments to top markets Canada, Mexico, and Taiwan. Imports are projected up slightly to 33,000 tons on higher shipments from Chile at the start of the marketing year.

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Turkey production is anticipated to see its first decline since 2014/15, falling 60,000 tons to 830,000 on freeze and frost damage in the major growing regions of Bursa and Izmir. Reduced supplies are expected to lower consumption while higher prices in export markets encourage sustained exports at 165,000 tons. Though adverse weather is affecting this year's crop, quality and volume of both peaches and nectarines have been improving in recent years on grower investments in high-yield varieties and the establishment of high-density orchards that utilize new cultivars, rootstocks, and training systems.

Chile production is expected to ease down to 159,000 tons on reduced water supplies, while exports are expected to hold steady at 100,000 tons on sustained shipments to top markets United States and China.

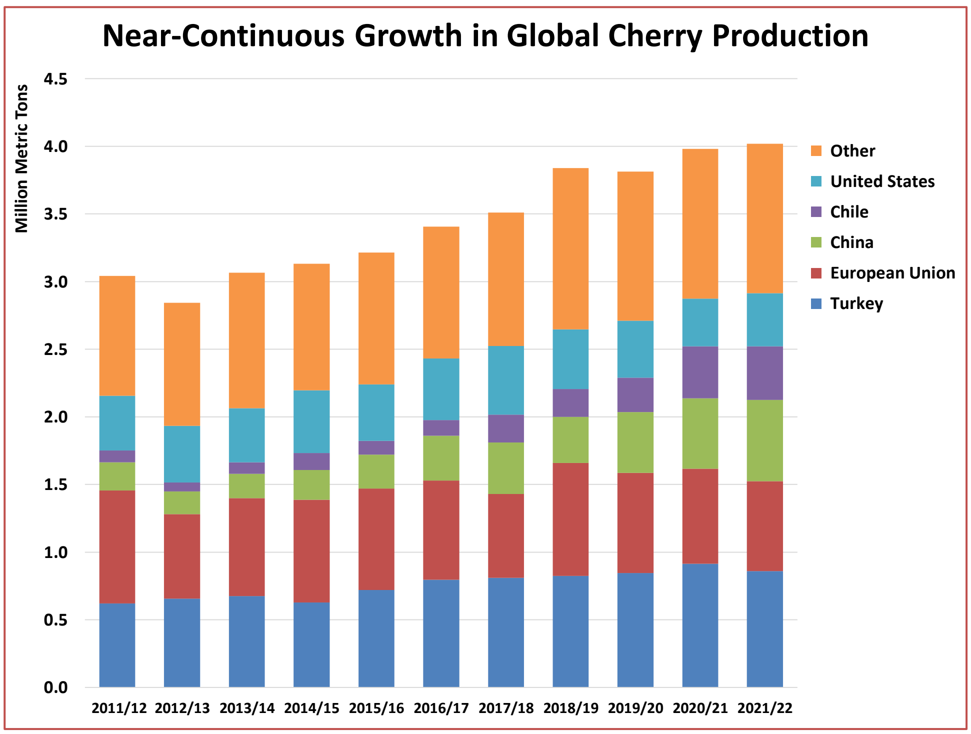
Japan production is forecast to edge higher to 102,000 tons as peaches recover from last year's dip below 100,000 tons. The majority of peach and nectarine output is consumed fresh domestically, and improved supplies are expected to keep consumption steady at 100,000 tons. However, consumption of both fruit is on a downward trend on lower demand from younger consumers. Greater peach output is also expected to nudge exports higher to 2,000 tons as peach growers look to export markets in the face of declining domestic consumption.

Australia production is forecast up 5,000 tons to 110,000. Although harvest labor constraints are expected to continue from last year, good growing conditions and the anticipation of ample water supplies is expected to give a modest boost to output. Exports are expected to receive only a slight lift from higher supplies as COVID-19-related air freight challenges continue, limiting shipments to 15,000 tons.

Russia imports are expected to see a minimal change, up slightly to 245,000 tons as higher shipments from Turkey barely offset lower shipments from Eastern European suppliers and restrictions on China peaches and nectarines.

Global Cherry Growth: A 10-year Perspective

Since 2011/12, fresh cherry production has increased almost 1.0 million tons to 4.0 million in 2020/21, recording only 2 years of decline. Of the 17 producing countries tracked in USDA's Production, Supply, and Distribution (PSD) database during this period, 11 countries expanded output. China, Chile, and Turkey top the list with average increases of over 30,000 tons per year. However, 6 countries had output shrink during this period (European Union, Japan, Kyrgyzstan, Serbia, Ukraine, and United States). Most notably, the European Union was the top producer in 2011/12 but was overtaken by Turkey the following year and has since seen its output drop 16 percent. Turkey has retained its primary position, followed by the European Union and China. China is moving ever closer to EU volumes as it continues to expand and improve its own industry. The United States is the fifth largest producer. With acreage not expanding, U.S. production during this period has ranged between about 350,000 and 500,000 tons due to varying weather and growing conditions. For 2021/22, global production is forecast slightly above 4.0 million tons.



Since 2011/12, fresh cherry exports have more than doubled, rising above 350,000 tons to 622,000 in 2020/21, declining only once by a nominal amount in 2018. While most of the increased trade represents Chile shipments to China (with China accounting for 57 percent of total world imports in 2020/21), other countries have also successfully strengthened their exports. Similar to production, of the 16 countries tracked in PSD, 11 countries have seen growth, while 5 have had exports contract during this time (Canada, European Union, Kyrgyzstan, Ukraine, and United States). The United States was the lead exporter from 2011/12 through 2013/14, but Chile had been expanding production in those years, and its exports finally surpassed the United States in 2014/15, dominating trade since then. Turkey has also seen improvements in its cherry exports as it has achieved the role of top producer. Nearly doubling its exports between 2011/12 and 2020/21, Turkey's shipments are often close to and sometimes exceed those of the United States. However, they have yet to exceed 100,000 tons which the United States has done twice (in 2012/13 and 2017/18). For 2021/22, Turkey exports are expected to drop back below those of the United States after edging above them in 2020/21. U.S. exports during this period have been variable, ranging between 67,000 and 112,000 tons. For 2021/22, global exports are forecast up once again, to 638,000 tons.

FRESH CHERRIES

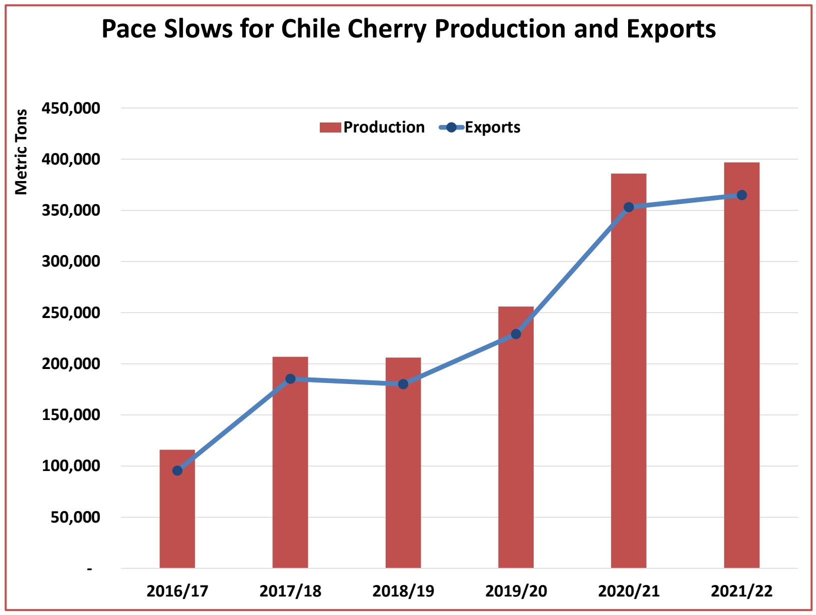
World cherry production for 2021/22 is forecast up slightly to over 4.0 million tons as higher supplies in China and the United States offset losses in Turkey and the European Union. Exports are projected up on higher shipments from Uzbekistan, Chile, and the United States.

Turkey production is projected down 54,000 tons to 860,000, declining for the first time since 2014/15, as frost and freeze damage reduces output in top growing regions Izmir and Manisa. Lower supplies are expected to pressure exports down 16,000 tons to 72,000, with reduced shipments to top market Russia. Turkey gained market access to China in 2019, and though COVID-19-related restrictions remain burdensome, exports to China increased from 900 tons in 2019/20 to 1,400 in 2020/21.

EU production is forecast to slip 37,000 tons to 665,000 due to a combination of frost, hail, and heavy rains across the EU. Though a modest decline, if realized, it would mark a third straight year of reduced output. The combination of a long-lasting frost, pest infestations, and insect attacks is expected to reduce France's crop to its lowest level in 50 years. Lower output is expected to reduce consumption to 705,000 tons, while exports are anticipated to remain steady at 15,000 tons on sustained shipments to top markets United Kingdom and Switzerland.

China production is expected to continue to rise, up 80,000 tons to 600,000 as new trees continue to come into production and as planted area continues to expand. The last several years have also seen growers planting or grafting new early-season varieties in order to extend the growing season. Imports are forecast to remain essentially unchanged at 335,000 tons on continued shipments from Chile.

Chile production is anticipated to rise again, though at a reduced rate, up 11,000 tons to 397,000, as growers more aggressively prune trees and thin flowers and fruit in an effort to improve quality and sizing. Drought is also expected to be a factor as most cherry growing regions are experiencing high average temperatures and reduced rainfall. Exports are forecast up only 3 percent to 365,000 tons on steady shipments to China.



U.S. production is forecast up 40,000 tons to 392,000 as both sweet and tart cherries rebound from last year's losses stemming from damaging weather. Sweet cherries are expected to be up on gains in Washington and California, while improvements in tart cherries output are anticipated in Utah and Washington, offsetting more frost and freeze damage in Michigan. USDA's NASS surveyed industry and published the U.S. forecast for cherry production in the June 2021 *Crop Production* report. A rebound in exports is projected on higher supplies, rising to 77,000 tons on greater shipments to Canada, Japan, and Mexico, while imports are expected to rise slightly to 14,000 tons on higher deliveries from Chile.

Russia imports are forecast to rise to a record 100,000 tons as higher shipments from Uzbekistan and Kazakhstan more than offset losses from Turkey.

NOTES TO USERS:

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 September 2021 with the release of 2021/22 data, PSD's for peaches/nectarines and cherries 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).

Marketing Years:

- **Peaches/Nectarines -** Northern Hemisphere countries are on a January-December year. Southern Hemisphere countries are on a November-October year indicated as the first year of the split year.
- **Cherries** - Northern Hemisphere countries are on an April-March year. Southern Hemisphere countries are on a November-October year indicated as the first year of the split year.

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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
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For the Global Agricultural Information Network (Agricultural Attaché Reports):
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For Global Agricultural Trade System (U.S. Exports and Imports):
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Peaches and Nectarines, Fresh: Production, Supply and Distribution in Selected Countries

(1,000 Metric Tons)

	2016/17	2017/18	2018/19	2019/20	2020/21	Sep 2021/22
Production						
China	14,200	14,300	13,500	15,800	15,000	16,000
European Union	3,778	4,346	3,881	4,066	3,237	2,698
Turkey	674	772	789	830	890	830
United States	840	758	687	709	656	716
Argentina	251	90	226	210	210	210
Uzbekistan	203	193	162	189	189	189
Brazil	194	250	220	183	183	183
Chile	149	159	158	165	160	159
Mexico	177	164	161	159	159	159
South Africa	182	183	152	144	144	144
Other	514	513	506	470	464	471
Total	21,161	21,727	20,442	22,925	21,291	21,759
Domestic Consumption						
China	14,127	14,213	13,458	15,706	14,959	15,981
European Union	3,465	3,991	3,652	3,801	3,071	2,558
United States	807	742	656	675	626	677
Turkey	624	683	663	725	727	665
Russia	230	278	264	231	277	281
Argentina	251	86	222	208	205	206
Brazil	212	269	241	196	196	198
Mexico	205	184	192	190	181	184
Uzbekistan	161	155	108	143	113	139
South Africa	165	166	137	125	115	114
Other	825	834	793	902	858	744
Total	21,072	21,602	20,384	22,901	21,328	21,747
Imports						
Russia	197	250	228	194	240	245
United Kingdom	98	90	79	97	67	70
Saudi Arabia	35	33	34	38	50	50
Canada	44	34	37	39	41	40
European Union	24	19	27	24	39	40
Iraq	27	35	40	62	76	40
China	0	9	22	27	37	36
Ukraine	26	34	23	48	48	35
United States	47	40	38	36	31	33
Switzerland	31	34	29	31	29	30
Other	270	273	212	271	206	133
Total	800	850	769	867	864	752
Exports						
European Union	312	344	227	259	180	175
Turkey	51	89	127	105	163	165
Chile	88	97	97	102	99	100
United States	81	55	69	71	61	72
China	74	96	63	121	78	55
Jordan	62	59	50	70	54	55
Uzbekistan	42	38	54	46	76	50
South Africa	19	19	18	21	32	30
Serbia	33	44	24	22	24	25
Australia	9	12	16	15	13	15
Other	93	92	52	27	24	17
Total	863	945	796	861	803	759

Note: The marketing year begins in January of the first year for Northern Hemisphere countries and November of the first year for Southern Hemisphere countries.

Cherries (sweet and sour), Fresh: Production, Supply and Distribution in Selected Countries

(1,000 Metric Tons)

	2016/17	2017/18	2018/19	2019/20	2020/21	Sep 2021/22
Production						
Turkey	795	809	824	846	914	860
European Union	734	620	835	738	702	665
China	330	380	340	450	520	600
Chile	116	207	206	256	386	397
United States	456	508	441	422	352	392
Russia	264	224	279	292	292	292
Uzbekistan	163	194	229	241	241	241
Ukraine	220	243	303	236	236	236
Serbia	118	119	147	114	114	114
Syria	54	68	61	66	66	66
Other	155	138	173	153	157	155
Total	3,405	3,509	3,838	3,814	3,980	4,018
Domestic Consumption						
China	425	571	520	680	856	935
Turkey	715	749	749	766	827	788
European Union	756	643	851	770	737	705
Russia	335	292	372	378	385	392
United States	393	410	366	347	298	329
Ukraine	219	239	300	233	237	237
Uzbekistan	134	166	201	230	214	196
Serbia	104	102	133	98	97	100
Syria	48	64	59	62	60	62
Canada	38	54	45	46	45	55
Other	215	190	220	175	194	200
Total	3,382	3,480	3,814	3,784	3,950	3,998
Imports						
China	95	192	180	230	336	335
Russia	71	68	93	85	93	100
European Union	56	46	43	50	52	55
Canada	23	33	28	28	26	35
Kazakhstan	24	22	25	8	18	25
Korea, South	14	19	19	15	17	15
United Kingdom	18	17	16	14	14	15
United States	13	14	12	10	13	14
Taiwan	11	15	12	12	13	10
Japan	5	5	3	4	4	6
Other	27	15	19	9	9	8
Total	356	446	450	466	594	618
Exports						
Chile	95	185	180	229	353	365
United States	76	112	87	84	67	77
Turkey	80	60	75	81	88	72
Uzbekistan	29	28	28	11	27	45
Azerbaijan	15	15	24	27	30	25
European Union	34	23	27	18	15	15
Serbia	19	21	16	17	17	15
Canada	10	11	13	9	7	7
Australia	3	4	5	5	5	6
Argentina	4	4	4	6	6	5
Other	15	11	14	9	8	6
Total	379	474	473	495	622	638

Note: The marketing year begins in April of the first year for Northern Hemisphere countries and November of the first year for Southern Hemisphere countries. Fresh cherries includes sweet and sour cherries.