United States Department of Agriculture

Foreign Agricultural Service

December 2020

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

FRESH APPLES

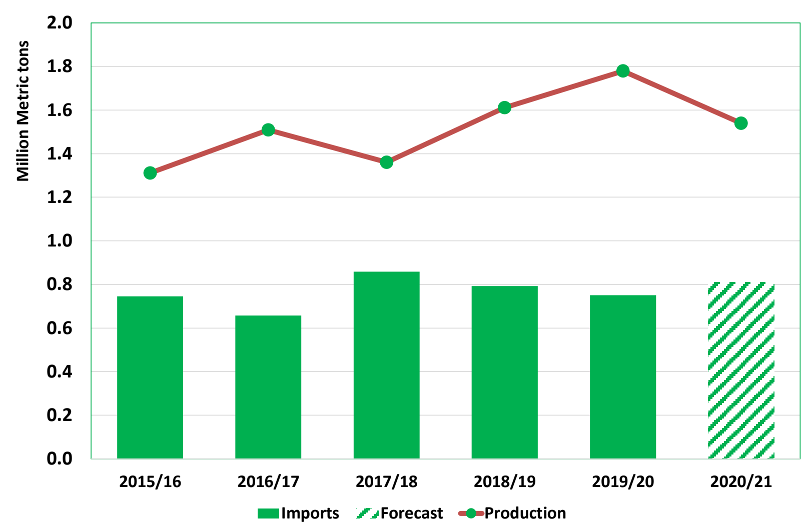
World production for 2020/21 is forecast to ease 3.3 million metric tons to 76.1 million primarily on a severe spring frost in China's northwest provinces. Despite lower supplies, exports are expected to remain nearly unchanged at 5.8 million tons as the European Union, particularly Poland, rebounds from last year's spectrum of bad weather events.

China production is projected down 1.9 million tons to 40.5 million due to severe frost in northern provinces that affected fruitset during flowering. This is expected to reduce supplies of high-quality fruit but increase volumes of lower grade apples that appeal to price-conscious Southeast Asian markets, boosting exports to 1.2 million tons. Imports are expected to drop over 20,000 tons to 80,000 as COVID-19 constraints prompt more conservative purchases by importers.

EU production is forecast up over 500,000 tons to 12.2 million, a recovery to historical levels as an on-year in non-commercial production more than offsets commercial losses resulting from frost, hail, and poor pollination in most Member States. Despite an easing of commercial supplies, exports are anticipated to rise 100,000 tons to 1.1 million on greater output in Poland, the EU's top exporter, as it partially recovers from last year's damaging frost and drought.

Russia production is anticipated to fall nearly 240,000 tons to 1.5 million due to spring frost and hail affecting commercial orchards and an off-year in non-commercial orchards following last year's bumper crop. Russia's commercial industry continues to evolve and grow as area planted expands with new orchards. At the same time, old orchards are being uprooted and replaced with new trees; however, yields from these new plantings are not yet at expected levels. Lower domestic supplies are forecast to boost shipments from Southern Hemisphere suppliers, raising imports nearly 60,000 tons to 810,000.

Russia Apple Imports Up on Lower Production



United States production is expected to slip 150,000 tons to 4.7 million as a wind storm affected orchards in Washington while Michigan experienced a severe freeze. USDA's National Agricultural Statistics Service (NASS) surveyed industry and published a U.S. forecast for apple production in the August 2020 Crop Production report. Lower supplies are likely to pressure exports down to 815,000 tons while lifting imports to 120,000 as demand boosts shipments from Canada and Southern Hemisphere suppliers.

Chile production is forecast to rise 46,000 tons to 1.2 million tons as abundant winter (June-August) rainfall is expected to improve yield, while planted area holds steady after 6 straight years of decline. Increased competition from other Southern Hemisphere growers and lower returns have been prompting some growers to switch to more profitable fruit and nut crops such as cherries and walnuts. Higher supplies are anticipated to lift exports 5,000 tons to 655,000.

Mexico production is projected to drop 80,000 tons to 680,000 due to adverse weather which affected fruit development in the top-growing state of Chihuahua. Despite this setback, acreage continues to expand and improve, with high-density plantings now accounting for nearly 30 percent of Chihuahua's planted area. Despite lower production and weak consumer demand, supplies from last season are expected to hold imports little changed at 250,000 tons.

New Zealand production is forecast nearly flat at 583,000 tons due to COVID-19-related uncertainties over labor availability. While another record crop is possible due to expanded growing area and good growing conditions, insufficient labor could affect pruning, thinning, and harvest. Assuming lower supplies, exports are forecast to contract slightly to 390,000 tons.

South Africa production is anticipated up for the third straight year. New trees coming into production combined with good growing conditions and sufficient water are expected to raise output 18,000 tons to a record 960,000. Planted area continues to rise on new land coming under cultivation, including the introduction of "low-chill" varieties in Northern Province that do not require typical low temperatures. Greater output is expected to lift exports to 510,000 tons.

Turkey production is forecast to jump 680,000 tons to a record 4.3 million on new trees coming into production and overall good growing conditions. This occurring in spite of some hail in Central Anatolia that includes the largest producing province of Isparta. Trees of older apple varieties continue to be replaced with newer varieties that appeal to export markets. Exports are anticipated to surge 40,000 tons to 250,000 on higher output. Higher supplies are also expected to boost domestic consumption, including in the juice sector which is experiencing new investment.

Note: Due to lack of data, production and exports for Iran apples have not been revised since the December 2019 forecast. As of this publication, and until data is available for Iran, the forecast is being discontinued, and also historical data will no longer be revised for the following countries: Afghanistan, Iran, Iraq, Pakistan, and Turkmenistan.

Key Revisions to 2019/20:

Country	Attribute	Previous	Current	Change	Reason
Argentina	Exports	100	120	20	production less affected by severe weather
Belarus	Production	317	700	383	updated FAO data
Brazil	Imports	75	109	34	higher shipments from Argentina and Chile
China	Production	41,000	42,425	1,425	revised official data
European Union	Production	11,477	11,705	228	revised official data
	Exports	1,000	1,015	15	greater-than-expected supplies despite adverse weather
	Imports	470	503	33	higher-than-expected shipments from Southern Hemisphere suppliers
India	Imports	175	194	19	higher shipments from Turkey
Indonesia	Imports	110	140	30	greater shipments from China
Kazakhstan	Imports	135	150	15	higher-than-expected shipments from Iran
Moldova	Production	400	665	265	updated FAO data
	Exports	185	238	53	higher shipments to Russia
Philippines	Imports	130	149	19	improved shipments from China
Russia	Imports	645	751	106	higher shipments from Serbia and Turkey
Serbia	Exports	190	206	16	greater shipments to Russia
South Africa	Exports	480	500	20	trade pace picked up despite COVID bottlenecks
Turkey	Production	3,000	3,620	620	revision based on official statistics
	Exports	180	209	29	improved shipments to India and Russia
Ukraine	Production	1,076	1,462	386	updated FAO data

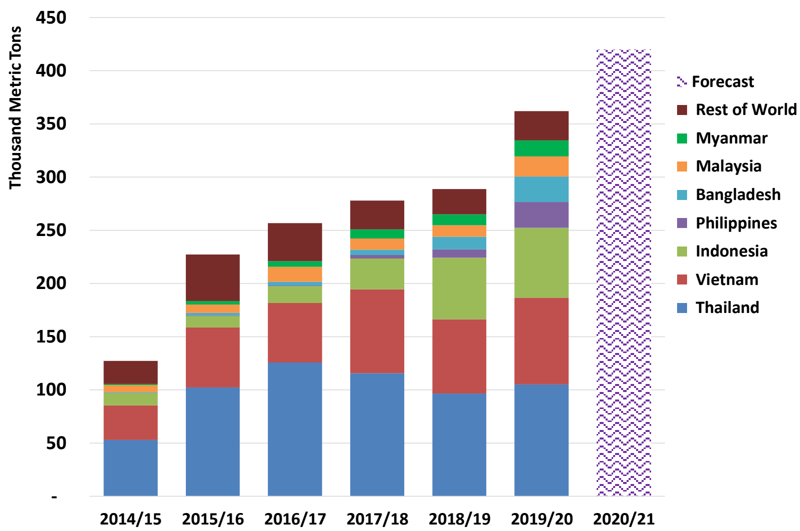
*Note: All figures are in thousand metric tons.

FRESH TABLE GRAPES

World production for 2020/21 is expected nearly unchanged at 25.7 million tons as gains in China are larger than weather-induced losses in the European Union. Steady supplies and flat demand are expected to result in nearly unchanged exports.

China production is forecast to see a slight gain of 400,000 tons to 11.0 million, reflecting continued enhancements in crop management techniques. Exports are projected up 58,000 tons to 420,000 as higher volumes and improved fruit quality resulting from the new crop techniques further strengthen shipments to Asian markets. Conservative purchases by importers due to COVID-19 constraints are expected to pressure imports down 19,000 tons to 220,000, with domestic supplies replacing imports.

China Table Grape Exports: Driving Even Higher to Asia Markets



Turkey production is anticipated to dip slightly to 2.0 million tons on summer hail damage in the Aegean Region that lowered yields as well as quality. A marginal contraction to 200,000 tons is expected for exports with reduced shipments to Middle Eastern markets offsetting deliveries to top markets Russia and Ukraine.

EU production is projected to fall 170,000 tons to 1.4 million as Italy, the top producing Member State, suffered severe frosts during flowering followed by damaging rain and hail in the fall. Even so, excellent grape quality is expected due to hot summer temperatures, though exports are forecast to a record low of 75,000 tons as lower supplies contribute to a seventh straight year of diminishing trade. Consumption is forecast to its lowest level since at least 2001/02 on reduced supplies and flat imports.

United States production is forecast up over 100,000 tons to 1.0 million tons. USDA's National Agricultural Statistics Service (NASS) surveyed industry and published a U.S. forecast for table grapes production in the August 2020 Crop Production report. Exports are expected to slip to 305,000 tons especially on lower demand from Mexico, while imports are projected down to 650,000 tons on lower output in Mexico following last year's bumper crop.

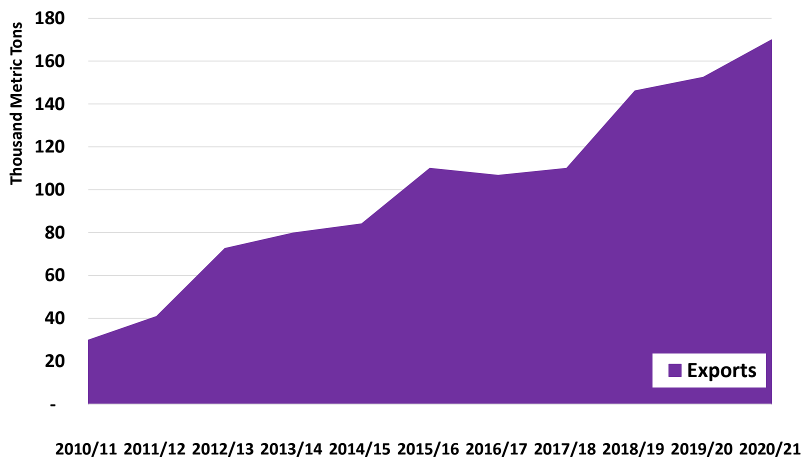
Peru production is expected to see another year of gains, rising 12,000 tons to 665,000 on favorable growing conditions and as new plantings continue to come into production. Demand in Northern Hemisphere markets continues to spur growth in planting area, with market preferences causing growers to increasingly switch to higher-value grape varieties. In line with production, exports are forecast up 15,000 tons to 415,000 as higher supplies boost shipments to top markets.

Chile production is forecast unchanged at 785,000 tons, stopping a nearly unchecked decline since 2012/13. Higher output from favorable weather and improved water supplies is expected to offset losses resulting from the continuing decline in planted area. Steady supplies are expected to sustain exports near last year's level.

South Africa production is anticipated up 8,000 tons to 330,000 on sufficient water supplies and new orchards and varieties coming into production. Table grape acreage continues to expand as new land is converted in the Northern Province and some wine grape growers in the Western Cape convert to table grapes. Exports are expected to follow production, rising 7,000 tons to 305,000 as higher output boosts shipments to the European Union.

Australia production is forecast up 15,000 tons to 240,000 as good growing conditions stimulate exceptional bud burst and excellent bunch formation. Assuming COVID-19 constraints do not hinder the harvest, exports are expected to continue their long upward trajectory, rising 17,000 tons to 170,000 as greater supplies boost shipments to Asian markets. Since 2009/10, exports have seen only a single year of decline (2016/17).

Onward and Upward for Australia Table Grapes Exports



Russia production is expected down slightly to 23,000 tons due to lower spring moisture in some southern regions. Planting area remains almost unchanged as investments are being made in wine grape rather than table grape production. Imports are forecast up at 310,00 tons on higher shipments from Turkey and Uzbekistan.

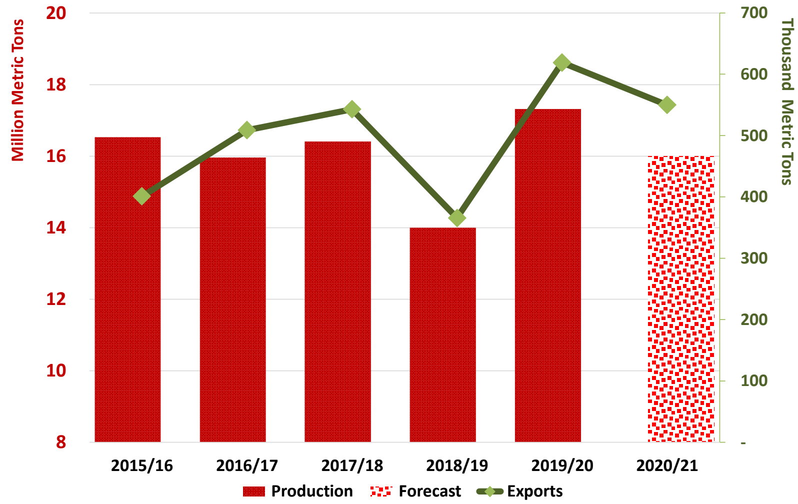
Key Revisions to 2019/20:

Country	Attribute	Previous	Current	Change	Reason
Bangladesh	Imports	0	60	60	added to the database going back to 2001/02
Brazil	Production	985	1,592	608	updated FAO data
China	Production	10,800	10,600	-200	revised official data
Egypt	Production	0	1,420	1,420	added to the database going back to 2015/16
	Exports	0	170	170	added to the database going back to 2015/16
	Imports	0	120	120	added to the database going back to 2015/16
European Union	Production	1,376	1,573	198	revised official data; less-than-expected rain damage in Italy
India	Exports	135	185	50	higher-than-expected exports despite COVID constraints
Philippines	Imports	0	53	53	added to the database going back to 2005/06
Saudi Arabia	Imports	0	70	70	added to the database going back to 2001/02
*Note: All figures are in thousand metric tons.					

FRESH PEARS

World production for 2020/21 is anticipated down over 1.0 million tons to 22.2 million on weather-induced losses in China. Trade is expected to decline on lower China output.

China production is forecast down 1.3 million tons to 16.0 million as an April frost slashed output in Hebei Province, the largest pear-producing region and principal source of export supplies. Lower output is expected to reduce shipments to Asian markets, forcing exports down nearly 70,000 tons to 550,000. Imports are pegged to remain even at 11,000 tons on unchanging demand for Western-style pears.



EU production is projected up almost 280,000 tons to 2.3 million on good growing conditions, reflecting a recovery from last year's losses from weather and pests, especially in top producer Italy. Greater supplies are expected to boost consumption, lower imports 14,000 tons to 170,000, and keep exports steady at 305,000 tons.

United States production is forecast up over 60,000 tons to 720,000 on ideal weather conditions in top growing states Washington and Oregon. USDA's National Agricultural Statistics Service (NASS) surveyed industry and published a U.S. forecast for pear production in the August 2020 *Crop Production* report. Despite higher supplies, exports are anticipated down to 110,000 tons on lower demand from top markets. Imports are projected down to 70,000 tons as higher domestic supplies discourage shipments from Argentina and Chile.

Argentina production is anticipated to rise slightly to 610,000 tons on good growing conditions. Though output is up, exports are expected to ease 10,000 tons to 320,000 as demand is dampened by higher supplies in the European Union and United States.

Chile production is slated to decline for the fourth straight year, down 9,000 tons to 213,000, as planted area continues to erode due to declining profits. Lower supplies and reduced demand in Northern Hemisphere markets are forecast to lower exports to 110,000 tons.

South Africa production is projected slightly higher at 410,000 tons on good growing conditions and sufficient water supplies. Planting area is also forecast to rise for the fourth straight year as it continues to recover to the pre-drought level of 2015/16. New orchards are replacing older orchards that had been removed to better manage water supplies. Exports are anticipated to remain nearly unchanged at 220,000 tons on steady demand from Russia.

Russia production is expected to see a 43,000-ton drop to 247,000 tons on weather damage in commercial orchards, while non-commercial or private orchards experience an off-year following last year's high output. Despite lower supplies, imports are expected to remain nearly flat at 195,000 tons as the higher prices of pears temper consumer purchases and shift them increasingly towards apples.

Key Revisions to 2019/20:

Country	Attribute	Previous	Current	Change	Reason
Argentina	Exports	295	330	35	higher-than-expected output despite hail
China	Production	17,000	17,314	314	revised official data
	Exports	580	619	39	greater shipments to Southeast Asia
European Union	Production	2,184	2,061	-123	revised official data
	Exports	295	305	10	higher supplies despite damaging weather and pests
Mexico	Imports	90	84	-6	lower shipments from the United States
Thailand	Imports	65	60	-5	lower-than-expected shipments from China
*Note: All figures are in thousand metric tons.					

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NOTES

European Union definition: includes countries in the customs union, including the UK (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, United Kingdom). The United Kingdom remains a member of the EU Customs Union for the duration of the transition period which expires December 31, 2020. A notice will be posted on respective USDA web pages to inform the public of how we intend to handle splitting the United Kingdom from the rest of the EU in our forecasts, GAIN reporting, and other data well in advance of any changes. The WASDE, FAS reports, and FAS databases will continue to reflect the EU-28 (EU-27+UK) until further notice.

Data Changes:
For Processing data (apples and pears only): data for this attribute is no longer being collected or reported upon due to concerns about the accuracy of the historical data. Going forward, for FAS posts which report on deciduous fruit, processing will be included in the attribute *Domestic Consumption*.

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 countries of Argentina, Chile, South Africa, and Peru are on an October-September marketing 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)

	2015/16	2016/17	2017/18	2018/19	2019/20	Dec 2020/21
Production						
China	38,900	40,393	41,390	33,000	42,425	40,500
European Union	12,453	12,723	10,005	15,029	11,705	12,227
United States	4,546	5,010	5,085	4,479	4,821	4,671
Turkey	2,570	2,926	3,032	3,600	3,620	4,300
India	2,520	2,258	1,920	2,300	2,370	2,300
Russia	1,311	1,509	1,360	1,611	1,779	1,540
Ukraine	1,099	1,076	1,462	1,462	1,462	1,462
Brazil	1,055	1,308	1,195	1,195	1,195	1,195
Chile	1,335	1,310	1,330	1,210	1,124	1,170
South Africa	924	902	836	894	942	960
Other	7,760	7,227	7,898	7,744	7,970	5,805
Total	74,474	76,641	75,512	72,524	79,413	76,131
Domestic Consumption						
China	37,826	39,088	40,172	32,275	41,487	39,380
European Union	11,145	11,568	9,773	14,347	11,192	11,627
Turkey	2,462	2,712	2,844	3,324	3,412	4,051
United States	3,956	4,314	4,212	3,884	4,067	3,976
India	2,366	2,283	1,955	2,313	2,250	2,352
Russia	1,980	2,042	2,156	2,322	2,443	2,273
Ukraine	1,112	1,105	1,426	1,418	1,462	1,457
Brazil	1,180	1,330	1,199	1,218	1,242	1,235
Mexico	967	983	1,001	794	1,017	930
Belarus	908	798	864	834	831	830
Other	9,803	9,479	9,252	9,378	9,707	7,638
Total	73,706	75,700	74,854	72,106	79,110	75,749
Imports						
Russia	746	657	859	793	751	810
European Union	451	425	531	493	503	515
Bangladesh	203	245	245	188	271	280
Egypt	267	145	72	271	253	250
Mexico	218	267	287	247	257	250
Vietnam	141	150	160	185	233	250
India	202	370	249	277	194	240
Canada	230	221	222	203	205	205
Saudi Arabia	205	192	181	182	195	200
Thailand	182	175	160	126	172	185
Other	3,628	3,408	3,099	2,830	2,910	2,487
Total	6,474	6,255	6,064	5,795	5,943	5,672
Exports						
China	1,151	1,376	1,281	818	1,042	1,200
European Union	1,590	1,486	761	1,175	1,015	1,115
United States	778	868	1,007	741	862	815
Chile	765	716	779	674	650	655
South Africa	511	553	449	472	500	510
New Zealand	347	345	369	391	400	390
Turkey	110	217	189	278	209	250
Moldova	170	168	264	299	238	230
Serbia	233	239	156	184	206	190
Argentina	91	78	96	111	120	110
Other	926	629	1,122	762	643	352
Total	6,672	6,674	6,473	5,904	5,884	5,817

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)

	2015/16	2016/17	2017/18	2018/19	2019/20	Dec 2020/21
Production						
China	10,000	10,100	10,500	9,900	10,600	11,000
India	2,590	2,784	2,800	2,900	3,125	3,000
Turkey	1,892	1,991	2,109	1,950	2,050	2,000
Brazil	1,113	1,743	1,592	1,592	1,592	1,592
Uzbekistan	1,613	1,626	1,590	1,590	1,590	1,590
Egypt	1,250	1,280	1,315	1,350	1,385	1,420
European Union	1,753	1,718	1,448	1,589	1,573	1,403
United States	947	943	935	997	906	1,020
Chile	868	917	915	835	785	785
Peru	540	611	623	630	653	665
Other	1,191	1,069	1,128	1,041	1,210	1,216
Total	23,757	24,783	24,955	24,374	25,469	25,690
Fresh Dom. Consumption						
China	10,022	10,081	10,464	9,873	10,477	10,800
India	2,220	2,358	2,401	2,356	2,648	2,600
European Union	2,280	2,280	2,057	2,192	2,172	2,008
Turkey	1,718	1,818	1,830	1,771	1,845	1,800
Brazil	1,110	1,723	1,572	1,561	1,555	1,554
Uzbekistan	1,507	1,528	1,463	1,472	1,494	1,485
Egypt	1,245	1,275	1,300	1,325	1,360	1,370
United States	1,150	1,189	1,217	1,199	1,253	1,365
Russia	346	228	412	307	307	329
Mexico	201	188	244	261	273	279
Other	1,751	1,838	1,928	1,784	1,833	1,848
Total	23,550	24,506	24,888	24,102	25,218	25,437
Imports						
European Union	615	649	688	682	677	680
United States	530	593	618	571	672	650
Russia	256	212	387	290	288	310
Hong Kong	232	229	250	259	238	235
China	249	237	242	262	239	220
Canada	170	176	180	179	189	190
Thailand	131	157	143	124	131	140
Vietnam	74	74	101	101	113	125
Egypt	80	85	100	110	125	120
Indonesia	49	68	81	112	94	95
Other	561	613	623	647	628	628
Total	2,948	3,093	3,412	3,336	3,393	3,393
Exports						
Chile	688	731	731	655	610	620
China	227	257	278	289	362	420
Peru	297	311	277	388	400	415
South Africa	255	304	279	276	298	305
United States	328	347	336	369	325	305
Hong Kong	190	212	214	226	205	200
Mexico	164	156	196	147	224	200
Turkey	175	173	280	179	205	200
India	160	200	210	250	185	180
Australia	110	107	110	146	153	170
Other	323	326	368	381	375	399
Total	2,916	3,123	3,279	3,305	3,341	3,414

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)

	2015/16	2016/17	2017/18	2018/19	2019/20	Dec 2020/21
Production						
China	16,530	15,960	16,410	14,000	17,314	16,000
European Union	2,513	2,340	2,384	2,591	2,061	2,337
United States	729	668	663	726	658	720
Argentina	580	540	580	600	600	610
Turkey	464	472	503	520	530	550
South Africa	430	432	408	413	407	410
India	323	340	280	3,000	310	300
Japan	278	275	259	259	259	259
Russia	155	236	218	242	290	247
Chile	267	290	262	252	222	213
Other	604	594	650	561	555	512
Total	22,872	22,146	22,618	23,164	23,206	22,157
Domestic Consumption						
China	16,137	15,458	15,875	13,645	16,707	15,461
European Union	2,404	2,241	2,240	2,449	1,941	2,202
United States	652	615	621	654	599	680
Turkey	440	456	459	478	479	495
Russia	406	446	470	461	436	401
India	307	333	267	2,988	327	320
Argentina	271	261	260	290	270	290
Japan	277	273	257	257	257	257
Indonesia	92	155	180	145	236	200
South Africa	180	166	186	188	191	190
Other	1,476	1,515	1,597	1,451	1,576	1,553
Total	22,641	21,919	22,412	23,006	23,020	22,049
Imports						
Indonesia	92	155	180	145	236	200
Russia	267	252	285	261	194	195
European Union	224	209	200	168	184	170
Brazil	147	156	158	154	143	140
Vietnam	70	78	88	63	130	135
Belarus	151	152	133	118	119	125
Hong Kong	76	68	73	85	76	80
Mexico	77	67	72	92	84	80
United States	79	73	79	73	72	70
Canada	68	64	64	66	60	65
Other	350	382	387	345	402	414
Total	1,601	1,656	1,719	1,569	1,700	1,674
Exports						
China	401	509	543	366	619	550
Argentina	310	280	320	310	330	320
European Union	310	308	344	310	305	305
South Africa	250	266	222	226	217	220
Chile	129	152	129	132	116	110
United States	156	126	122	144	130	110
Turkey	24	16	44	42	51	55
Belarus	122	92	83	70	16	25
Korea, South	23	26	32	27	31	25
Australia	10	9	12	9	9	9
Other	16	18	13	15	15	12
Total	1,752	1,800	1,864	1,650	1,840	1,741

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.