



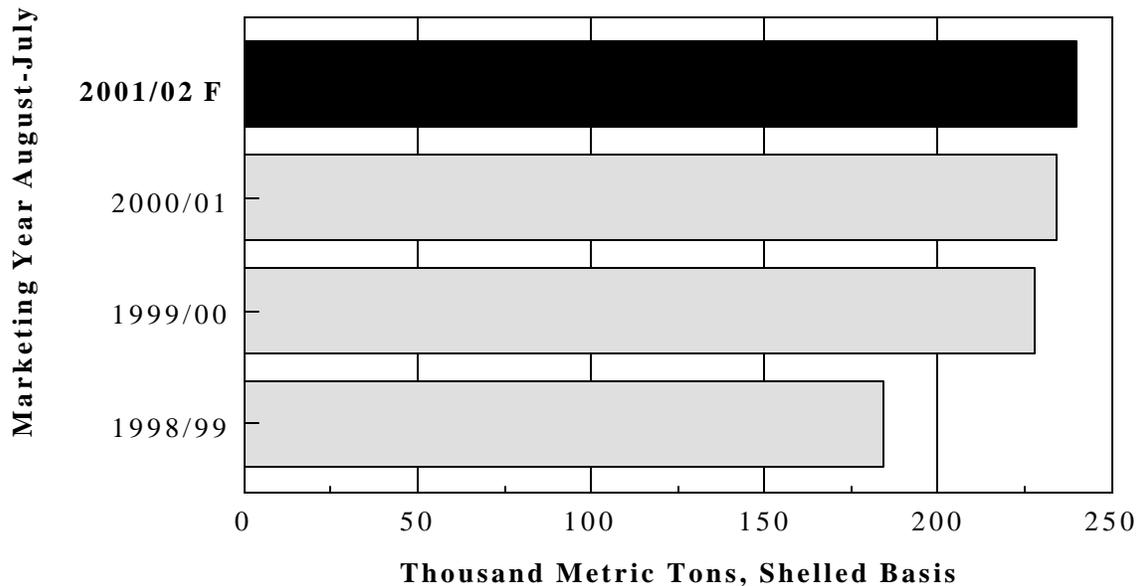
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World Horticultural Trade and U.S. Export Opportunities

U.S. Almond Exports Forecast to Continue to Increase in MY 2001/02



Source: U.S. Department of Commerce, Bureau of the Census

U.S. almond exports in marketing year (MY) 2001/02 are forecast at nearly 240,000 tons, shelled basis, up 3 percent from shipments in MY2000/01. Increased production, anticipated lower prices, and strong overseas demand are expected to continue to expand U.S. almond shipments in 2001/02. In 2000/01, shelled almonds, including prepared and preserved, accounted for 91 percent of total U.S. almond exports. Major buyers of U.S. shelled almonds were the European Union (primarily Germany, Spain, and the Netherlands), accounting for 53 percent, and Asia (primarily, India, Japan, and China) purchasing 29 percent. Asia is the most significant importer of in-shell almonds, purchasing nearly 79 percent of U.S. in-shell exports in 2000/01. With support from the Market Access Program, the U.S. almond industry continues to dominate the export market. China was a success story during the 2000/01 season, with sales up 44 percent from the previous season's shipments. China is now the fourth largest market for U.S. almonds, following Germany, Spain, and India.

[Check Out the New U.S. Trade Internet System Website. Go to
<http://www.fas.usda.gov/ustrade>]

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Export Summary

August 2001

U.S. exports of horticultural products to all countries in August 2001 totaled \$893 million, down 2.9 percent from August 2000. The only categories with increases in August were miscellaneous horticultural products (up 5.7 percent to \$161 million), processed vegetables (up 0.3 percent to \$146 million), and wine and beer (up 2.7 percent to \$70 million). All other categories declined, with double-digit declines in essential oils (down 16 percent to \$54 million), processed fruits (down 13 percent to \$54 million), and fruit and vegetable juices (down 10 percent from August 2000 to \$67 million).

August exports to Canada, the largest market, were up 3 percent from August 2000 to \$271 million. Exports to the European Union (EU) were down 13 percent to \$144 million, while shipments to Japan were down 18 percent to \$112 million. Exports to Mexico rose 20 percent from August 2000 to \$103 million. Exports to Malaysia showed the most dramatic jump for August 2001, up 29 percent from August 2000, to \$11 million. Exports in August 2001 to Hong Kong, the Philippines, and Singapore fell to \$41 million (down 18 percent), \$9 million (down 15 percent), and \$9 million (down 15 percent), respectively, from August 2000.

Exports for the October-August 2000/01 period are up 6 percent from the same period in 1999/2000 to \$10.2 billion. Shipments of tree nuts show the most growth (up 16.9 percent to \$1 billion) for the October-

August 2000/01 period. Essential oils exports are up 16.7 percent to \$630 million, fresh fruit exports are up 9 percent to almost \$2 billion, and fresh vegetable exports are up 5 percent to \$1.2 billion. The fastest growing markets for FY 2001 to date are: China, up 73 percent; Malaysia, up 65 percent; Mexico, up 13 percent; the Philippines, up 13 percent; and the European Union, up 10 percent. On the other hand, exports to Japan are down 4 percent for the October-August 2000/01 period.

New U.S. Trade Internet System Facilitates Public Access to Trade Data

The public now has unlimited access to the most up-to-date data on U.S. exports and imports of agricultural, fishery, and forestry products, to the 10-digit Harmonized System (HS) classification code level. The U.S. Trade Internet System allows users the flexibility to customize their data searches and save their criteria for repeated use. Users can obtain value or volume data for selected HS codes or commodity groupings to track trends going back to 1989.

To view the site go to <http://www.fas.usda.gov/ustrade/>

For more information on the U.S. Trade Internet System, e-mail usthelp@fas.usda.gov

To access **FAS Attache Reports** on line, please go to the following Internet address:

[Http:// www.fas.usda.gov/scripts/attachrep/default.asp](http://www.fas.usda.gov/scripts/attachrep/default.asp)

Search through the country and market reports prepared by FAS attaches covering over 20 horticultural and tropical product commodities and nearly 130 countries.

What's New on the Homepage?

The Horticultural and Tropical Products Division has introduced a feature on its homepage designed to bring the latest information to the public as efficiently as possible. The site contains information on policy and technical developments affecting trade in horticultural commodities, selected reports submitted by FAS overseas offices, and special reports. For further information, please contact Nancy Hirschhorn (202)720-2974. Go to <http://www.fas.usda.gov/htp/>.

Almond Situation and Outlook

In 2001/02, increased output in the United States, the world's largest producer, as well as several other smaller producers around the globe will increase world almond supplies 11 percent from last year. As a result, U.S. almond grower prices are expected to decline from the 2000/01 level of \$1.01 per pound (based on the edible portion of the crop). Between 1996/97 and 2000/01, U.S. almond grower prices have declined by 51 percent. However, low almond prices encourage consumption and have in the past boosted U.S. exports to record levels. Lower world prices for almonds and an expected strong overseas demand should contribute to continued high levels of exports in 2001/02 and beyond.

United States

U.S. almond production in 2001/02 is forecast at a record 396,893 metric tons [*California Agricultural Statistics Service (CASS) preliminary forecast May 9, 2001*], a 19-percent increase from the previous year. This increase in output is based on 212,461 bearing hectares, a 5-percent increase from 2000/2001. Total U.S. almond supplies in 2001/02 are forecast at 445,643 tons, up 11 percent from the previous season, due to a large increase in production.

With the cyclical nature of almonds, the 2001 season began with growers expecting a much heavier set than last year. Yields were expected to return to 1999's level. However, weather conditions have been less than ideal, resulting in reduced expectations for the 2001 crop. Low temperatures and rain during the critical bloom period decreased the ability of bees to successfully pollinate many orchards

across the producing areas of California. Also, high winds blew over some trees, particularly in older orchards. Despite the poor weather conditions, yields are expected to be up 19 percent from last year, but 4 percent below the record set in 1999.

Almond growers welcomed a break from the previous 5-year slump in prices, as grower prices rose 17 percent from the 1999/2000 level to

**Falling Grower Prices Boost
U.S. Almond Exports**



Source: NASS/USDA

\$1.01/lb. in 2000/01. Unfortunately, grower prices are expected to decrease during 2001/02, due to higher U.S. output and supplies. Approximately 75 percent of the world's almonds are produced by the United States.

In 2001/02, U.S. almond exports are forecast at 238,211 tons, up 2 percent from the previous year. Low almond prices are expected to spur exports. In 2000/01, shelled almonds, including prepared and preserved, accounted for 91 percent of total U.S. almond exports. Major buyers of U.S. shelled almonds were the European Union (primarily Germany, Spain, and the Netherlands), accounting for 53 percent, and Asia (primarily, India, Japan, and China) purchasing 29 percent. Asia is the most significant importer of in-shell almonds, purchasing nearly 79 percent of U.S. in-shell exports in 2000/01.

With support from the Market Access Program, the U.S. almond industry continues to dominate the export market. China was a success story this year, with sales up 44 percent from last year. China is now the fourth largest market for U.S. almonds, following Germany, Spain, and India. Expanding consumption is critical in selling the large U.S. crop, so marketing campaigns are focused on the message that almonds are a healthy way to snack.

Spain

Spain's 2001/02 almond production is forecast at 68,000 tons, a 24-percent increase from the previous season, due to favorable weather conditions in most growing areas. Production in several areas, however, will be smaller than normal since drought and frost led to poor blossoming and reduced yields. According to a recent survey, there were 794,000 bearing hectares, of which less than 6 percent were irrigated. Consequently, rainfall during the fall is crucial to almond productivity. Exports in 2001/02 are forecast at 48,000 tons, only a slight increase from last year, due to the larger crop. Other EU countries (Germany, France, and Italy) are the major destinations, representing about 93 percent of Spain's export markets. Almond imports in 2001/02 are forecast to increase slightly. The United States continues to be the dominant foreign supplier of almonds to Spain, increasing its market share to 97 percent of total imports for 2000/01. Due to their uniformity and low breakage, U.S. almonds are generally preferred by almond processors to produce food ingredients. Once processed, about 50 percent of U.S. almonds are exported to other EU countries.

While there is no price support program for tree nuts, the EU does have an improvement plan that is implemented in both Spain's almond and hazelnut sectors. Up to 475 ECU/hectare can be provided to growers to plant improved, higher-yielding varieties. While this program was expected to end this year, Spanish nut growers effectively voiced their opposition to its demise and secured a one-year extension. The government of Spain and industry continue to seek an extension of the program until the implementation of the new fruit and vegetable regime, which is scheduled, in principle, to take place in 2003. Given competition from U.S. product, Spanish almond growers consider this program vital to their future competitiveness and are expected to oppose the most

recent EU proposal for reform of the fruit and vegetable regime, which calls for a significant cut in subsidies.

Italy

Almond production for 2001/02 is forecast at 20,000 tons (shelled basis), double the poor crop harvested last year. Weather conditions remained very favorable during the whole season and trees are expected to produce at almost their current maximum capacity. Furthermore, some observers tie the production increase to the cyclical crop fluctuation, which is more pronounced in Italy's ageing almond trees. Domestic almond prices have followed the world market trend for 2000/01 year, averaging 6 percent more than the previous year. After high levels reported during September 2000-January 2001, prices declined significantly and are now reported at levels close to one year ago. However, relatively cheap almond prices are still favoring domestic consumption, and in some cases are causing substitution for other, more expensive nuts. Imported nuts are mostly consumed in northern Italy, while local almonds are more popular in the south, where Italian production is concentrated. Over the past four years, imports have grown in response to both decreasing domestic production and expanding consumption, fluctuating only in response to the domestic crop volume. Price competitiveness between the United States and Spain, Italy's two main almond sources, will remain key in determining which country gains a larger share of the Italian market.

Greece

Greek almond production in 2000/01 totaled 15,500 tons, compared to 17,000 tons in 1999 (shelled basis) due to unfavorable weather conditions in early June (hail storms in the area of Magnisia of eastern Thessaly) as well as the loss of some orchards from forest fires. The quality of the crops in 1999, 2000, as well as the anticipated 2001 harvest, continue to be very good to excellent. Due to the cyclical nature of tree yields and stable tree numbers, the outlook for almond production over the next 3 to 5 years is estimated to average about 16,000 tons/annum (shelled basis), provided that weather conditions are favorable. The output for 2001 is currently estimated to reach 17,200 tons, the highest level recorded in the past 5 years. The shell/in-shell ratio for Greek almonds (weighted average) is 28 percent.

Despite grower complaints that high input costs and cheap imports make domestic production unprofitable, traders considered 2000/01 grower prices satisfactory. Greece has the highest per capita consumption of nuts in the world and produces mainly to meet domestic demand and the growing tourism industry. Almond consumption represents about 25 percent of total domestic nut consumption which is estimated at 60,000 tons. Almond exports consist only of excess nuts, which go primarily to other EU countries.

Turkey

Almonds are a minor nut crop in Turkey. Almonds grow naturally in Turkey, but were not cultivated as a commercial crop until recently. In 2000/01, almond production in Turkey is forecast at 15,000 tons, down slightly from the previous year. Consumption has been growing slowly, due to the abundant availability of the preferred hazelnuts. Almost all increases in aggregate consumption are the result of increased population, rather than increased per capita consumption. Almonds are generally consumed whole as a snack food, with limited amounts utilized in confectionary products. Trade is mainly restricted to border exchanges with neighboring countries.

The FAS Attaché Report search engine contains detailed reports on Tree Nut Competition or Market Intelligence for 16 countries, including Spain, Italy, Greece, and Turkey. (For information on production and trade, contact Erik Hansen at 202-720-0875. For information on marketing contact Ingrid Mohn at 202-720-5330. Also, visit the tree nuts web page at: <http://www.fas.usda.gov/http/horticulture/nuts.html>)

ALMONDS: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES

Country/ Marketing Year 1/	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks
Metric tons, shelled basis							
Greece							
1998/99	4,523	12,000	2,400	18,923	800	14,500	3,623
1999/00	3,623	17,000	2,000	22,623	2,800	14,700	5,123
2000/01	5,123	15,500	2,500	23,123	1,000	16,000	6,123
2001/02	6,123	17,200	2,000	25,323	2,800	16,500	6,023
2002/03 F	6,023	16,000	2,000	24,023	2,600	16,500	4,923
Italy							
1998/99	2,000	9,000	13,781	24,781	1,188	22,593	1,000
1999/00	1,000	17,000	16,400	34,400	2,000	30,400	2,000
2000/01	2,000	10,000	16,000	28,000	2,200	24,800	1,000
2001/02	1,000	20,000	12,000	33,000	3,000	28,000	2,000
2002/03 F	2,000	15,000	15,000	32,000	2,000	28,000	2,000
Spain							
1998/99	14,000	30,000	26,300	70,300	40,700	29,600	0
1999/00	0	66,000	34,000	100,000	43,000	52,000	5,000
2000/01	5,000	53,000	31,000	89,000	47,000	41,500	500
2001/02	500	68,000	32,000	100,500	48,000	50,000	2,500
2002/03 F	2,500	62,000	32,000	96,500	45,000	50,000	1,500
Turkey							
1998/99	1,000	12,000	2,000	15,000	200	13,800	1,000
1999/00	1,000	14,000	2,000	17,000	200	14,800	2,000
2000/01	2,000	15,500	2,500	20,000	500	16,500	3,000
2001/02	3,000	15,000	2,000	20,000	500	17,000	2,500
2002/03 F	2,500	15,000	2,000	19,500	500	17,000	2,000
United States 2/ 3/ 4/ 5/							
1998/99	78,017	235,868	86	313,971	183,917	88,414	41,640
1999/00	41,640	377,842	104	419,586	228,169	110,832	79,243
2000/01	79,222	323,411	75	402,708	233,561	111,474	31,343
2001/02 F	48,670	396,893	80	445,643	238,211	121,541	85,891
2002/03	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Total							
1998/99	99,540	298,868	44,567	442,975	226,805	168,907	47,263
1999/00	47,263	491,842	54,504	593,609	276,169	222,732	93,366
2000/01	93,345	417,411	52,075	562,831	284,261	210,274	41,966
2001/02	59,293	517,093	48,080	624,466	292,511	233,041	98,914
2002/03 F	N/A	N/A	N/A	N/A	N/A	N/A	N/A

1/ Marketing Years: August-July for the United States; September-August for Spain, Italy, Turkey; October-September for Greece.

2/ U.S. import data are from Bureau of the Census with input from the Almond Board of California (ABC). Import forecast originates with the Foreign Agricultural Service (FAS)/USDA.

3/ The U.S. domestic shelling ratios for imports for 1998/99, 1999/00, 2000/01, and 2001/02 are .554, .62, .60, and .591 respectively and originate with the National Agricultural Statistics Service (NASS)/USDA.

4/ U.S. export and stock data for 1998/99, 1999/2000, 2000/01 come from the ABC; 2001/2002 export forecast based on preliminary data from the ABC; 2001/2002 stock estimate from ABC.

5/ U.S. production forecast for 2001/2002 by the National Agricultural Statistics Service (NASS).

F=Forecast.

SOURCES: USDA's Foreign Agricultural Service (FAS) Attaché Reports, Bureau of Census, ABC, and USDA/NASS.

U.S. Exports of Almonds to Principal Markets 1/ Marketing Years 1996/97 - 2000/01

Destination	1996/97	1997/98	1998/99	1999/2000	2000/01
Metric Tons: Shelled, In-Shell, and Prepared/Preserved Basis					
Australia	2,331	1,877	1,381	1,014	538
Canada	7,778	9,328	9,780	11,248	11,200
China/Hong Kong	3,088	3,342	3,638	10,311	14,884
European Union	113,646	124,170	117,060	115,720	133,766
Other Europe	5,477	5,179	4,807	4,092	2,913
Japan	18,759	22,485	16,505	18,917	20,988
India	9,433	20,017	14,665	22,208	26,543
Israel	2,295	2,955	2,463	2,888	2,785
Lebanon	872	1,538	1,174	936	1,424
Mexico	3,747	4,500	5,780	7,494	5,846
Saudi Arabia	1,044	2,350	2,055	2,138	3,277
South Korea	3,521	2,633	2,666	3,154	4,885
Taiwan	2,390	2,844	1,965	2,192	3,558
United Arab Emirates	2,781	4,693	4,504	5,016	10,082
All Other Countries	6,657	11,091	8,471	7,855	12,013
Grand Total MT	183,819	219,002	196,914	215,183	254,702

1/ Marketing years, August - July. Note: All data from the U.S. Census Bureau

U.S. Imports of Almonds Calendar Years 1996 - 2000

Origin	1996	1997	1998	1999	2000
Metric Tons: Shelled, In-Shell, and Prepared/Preserved Basis					
Denmark	2	0	0	11	60
China/Hong Kong	38	21	42	38	37
Canada	7	17	25	1	21
Italy	2	4	2	3	13
Turkey	0	0	0	0	11
Germany	0	0	0	0	8
Spain	0	5	3	3	4
France	8	1	3	6	2
Portugal	3	3	0	0	2
Switzerland	2	0	2	3	2
All Other Countries	2	23	6	10	2
Grand Total MT	64	74	83	75	162

1/ Calendar Year 1996-2000. Note: All data from the U.S. Census Bureau

Northern Hemisphere Apple Situation and Outlook

Apple production in 2001/02 by selected producing countries in the Northern Hemisphere is forecast at 40.5 million tons, down 7 percent from the record 2000/01 output. The decrease reflects lower production in most major Northern Hemisphere producing countries, including China, the United States, and in countries of the European Union (EU), notably Germany, France, and Italy. Apple exports by selected Northern Hemisphere countries in 2001/02 are forecast at 3.3 million tons, 9 percent below record shipments established in 2000/01. U.S. apple exports are forecast to decrease sharply in 2001/02 to 530,000 tons, the lowest volume since marketing year 1992/93, when U.S. apple shipments totaled 489,440 tons. A smaller apple crop in Washington state and related higher prices will likely limit U.S. apple exports this season. Washington state is the major apple exporting state, accounting for more than 80 percent of total U.S. annual apple shipments.

Production

Apple Production in the Northern Hemisphere to Decrease for the First Time in Five Years

Total apple production in selected Northern Hemisphere countries in 2001/02 is forecast at 40.5 million tons, down 7 percent from the record 2000/01 output and the first decline since the 1997/98 season, when selected Northern Hemisphere countries produced a combined 38.4 million tons. The decrease reflects lower production in most major producing countries in the Northern Hemisphere, including *China, the United States*, and countries in the *EU*, notably *Germany, France, and Italy*.

Apple production in *China*, the world's largest producer, is forecast to decrease again in 2001/02 to 20.1 million tons. Continued overall decline in planted acreage and unfavorable weather conditions in the eastern part of China would likely slow down Chinese apple production for the second consecutive season. Most of China's deciduous fruit is grown by many individual growers on small parcels of land. The average amount of land each grower devotes to growing fruit is less than a hectare. More successful growers often manage a greater amount of acreage. Large commercial or government planting with acreage in the hundreds of hectares, are rare. Apple production in China accounts for more than 40 percent of the world output. The apple harvest season starts in August and continues until November, with the bulk of harvesting occurring in October. The major varieties grown in China are Fuji, New Red Star, Guoguang, and Qinguan, which is the variety most popular among China's apple juice concentrate producers.

Apple production in selected countries of the *EU* in 2001/02 is forecast at 7.8 million tons, 18 percent below the record 9.4 million tons set last season. The lower EU apple crop reflects decreased production in major EU producing countries, such as *France*, *Italy*, and *Germany*.

The 2001/02 *French* apple crop is forecast at 2.1 million tons, 10 percent below the previous year's output, partly due to a slight decrease in area planted. While no major frost was reported in the spring, flowering was affected by excess rainfall. *Germany's* apple production is forecast to decrease in 2001/02 to 1.5 million tons, a sharp drop from the record 2.6 million tons recorded in 2000/01. The big drop is largely due to the so called "alternate" phenomenon or nature of many deciduous fruit trees. The phenomenon, which prevents the trees from overexerting, happens when a year of large production is followed by a year with a rather low crop. In *Germany*, this phenomenon especially appears in noncommercial apple production.

Similar to the situation in *France* and *Germany*, apple production in *Italy* is forecast down to 2.03 million tons. The decline is due to unfavorable weather conditions, which also affected fruit quality. Italian apple acreage continues to decline, except in Trentino Alto-Adige, which accounts for about 60 percent of total Italian apple production. On the other hand, *Spain's* apple crop is forecast to increase 25 percent to 875,000 tons. *Spain's* apple production has enjoyed generally favorable weather this season and the quality of the crop is expected to be good. *France*, *Italy*, *Germany*, and *Spain* account for the bulk of the EU's apple crop. Golden delicious, Jonagold, Red delicious, and Gala are the major apple varieties produced, in that order. New varieties, such as Braeburn and Fuji, are making inroads in Europe in response to consumers' changes in preferences.

Apple production in the *United States* in 2001/02 is forecast at 4.4 million tons, the lowest level since 1988/89. Most of that drop is coming from Washington, the main producing state. Apple production in Washington in 2001/02 is forecast to decrease 17 percent to 2.2 million tons, mainly the result of hail damaged trees and reduced acreage of Red Delicious planting. Also, apple orchards in Washington experienced a more moderate bloom after last year's heavy crop. On the other hand, apple production in New York and Michigan, the second and third largest apple producing states, is expected to increase 6 percent and 14 percent, respectively. California's apple crop is forecast at about 315,000 tons, 7 percent above last season's output. Increased production of non-traditional varieties, such as Fuji, Gala, Pink Lady, and Braeburn, would likely continue to account for a larger share of the U.S. 2001/02 total apple crop.

Trade

Northern Hemisphere apple exports are forecast to decrease in 2001/02

Apple exports from selected countries in the Northern Hemisphere in 2001/02 are forecast at 3.3 million tons, 9 percent below last season's shipments. Lower exports are forecast from the *EU* and the *United*

States. On the other hand, apple shipments in 2001/02 from *China* and *Poland* are forecast to increase 5 percent and 25 percent, respectively.

Combined apple exports from selected countries in the *EU* in 2001/02 are forecast at 2.1 million tons, down 7 percent from shipments in 2000/01. Lower supplies in *France* and *Italy*, the two top exporters in the EU, will likely hamper overall EU 2001/02 export performance.

U.S. apple exports in 2001/02 are forecast at 530,000 tons, 29 percent less than shipments last season. A smaller apple crop in Washington state, anticipated higher prices, and the gloomy economic situation anticipated this season in certain key importing countries will likely limit U.S. apple exports in 2001/02. On average, about 40 percent of U.S. annual apple exports are destined to Latin America (including Mexico, Central America, South America, and the Caribbean). Asia accounts for about 35 percent, and the Middle East and Europe for about 5 percent each. Canada alone accounts for about 15 percent of U.S. annual apple shipments.

About 20,000 tons of *U.S.* apples from last season's crop will be diverted from the fresh market this season as the result of an industry-sponsored incentive program. The program, which was announced on August 9, 2001, offers up to 4 cents per pound of apples removed from the fresh market. The plan was developed to reduce inventories of apples into the new season and, as such, alleviate an oversupply situation.

China's apple exports in 2001/02 are forecast at close to 282,000 tons, up 5 percent from 2000/01 shipments. China continues to expand its export markets, especially to neighboring Asian countries and Russia. The Fuji variety accounts for about 80 percent of China's apple exports. However, China's apple exports have recently encountered some problems. On October 11, 2001, the Philippine Department of Agriculture ordered a ban on most fruit and nut imports from China, including apples. The ban was imposed in response to the interception of codling moths (*Cydia pomonella*) in a shipment of Chinese apples the week of October 1-5, 2001.

U.S. apple exports in 2000/01 set record volume

U.S. apple exports in marketing year 2000/01 totaled a record 750,531 tons, valued at nearly \$420 million, 40 percent more than volume sales in 1999/00. A larger apple crop in Washington state and related lower prices, combined with some stabilization of the economies of certain key importing markets boosted U.S. apple exports in 2000/01. Shipments increased to all major U.S. apple markets, including Mexico (up 45 percent to a record 224,133 tons), Taiwan (up 32 percent), Canada (up 14 percent), Hong Kong (up 108 percent), and Indonesia (up 51 percent). Fresh exports have become increasingly important for U.S. apple producers. In 2000/01, 16 percent of the total U.S. apple crop was exported, compared to 6 percent in 1987/88. Despite its inspection program, which precludes access for a number of U.S. producing states, Mexico has emerged as the top destination for U.S. apples. Nearly 30 percent of total U.S. apple exports

in 2000/01 were destined to Mexico, compared to 3 percent in 1989/90. Continued supplies of good-quality fruit, strong demand from leading customers, and market promotion efforts should continue to boost U.S. apple sales in foreign markets. Moreover, Mexico's prominence as a market has made it increasingly critical to address all trade-related concerns to ensure the smooth flow of apple shipments.

SOUTHERN HEMISPHERE

The forecast for the Southern Hemisphere countries for the 2001/02 season (harvest in 2002) will be available in the March 2002 issue of **World Horticultural Trade & U.S. Export Opportunities**.

(For information on production and trade, contact Samuel Rosa at 202-720-6086. For information on marketing, contact Ted Goldamer at 202-720-8498. The FAS Attache Report search engine contains reports on deciduous fruit for more than 20 countries. Also, visit our apple webpage at: <http://www.fas.usda.gov/htp/horticulture/apples/html>)

TABLE 1
APPLES: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS)

Country	Production	Imports	Supply	Exports	Domestic	Processed	Withdrawals
Mktg. Year 1/			Utilization		Consumption		
NORTHERN HEMISPHERE COUNTRIES							
SELECTED EUROPEAN UNION (EU) COUNTRIES							
Belgium-Luxembourg							
1998/99	417,246	232,277	649,523	313,917	202,740	120,000	12,866
1999/00	562,385	215,408	777,793	432,476	199,386	140,000	5,931
2000/01	516,640	220,000	736,640	345,000	208,640	133,000	50,000
2001/02 F	322,370	250,000	572,370	280,000	212,370	80,000	0
France							
1998/99	1,793,900	104,000	1,897,900	630,600	917,300	300,000	50,000
1999/00	2,165,800	80,300	2,246,100	795,500	990,600	310,000	150,000
2000/01	2,300,000	92,000	2,392,000	870,000	1,113,600	310,000	98,400
2001/02 F	2,061,000	100,000	2,161,000	800,000	991,000	310,000	60,000
Germany							
1998/99	1,980,000	641,021	2,621,021	65,473	1,690,306	857,000	8,242
1999/00	1,936,000	787,692	2,723,692	67,954	1,815,149	838,000	2,589
2000/01	2,630,802	642,047	3,272,849	72,720	2,080,580	1,108,000	11,549
2001/02 F	1,490,000	900,000	2,390,000	65,000	1,723,000	600,000	2,000
Greece							
1998/99	332,000	11,000	343,000	13,900	284,100	4,000	41,000
1999/00	310,000	14,000	324,000	16,000	271,000	2,000	35,000
2000/01	320,000	14,000	334,000	28,500	280,000	5,500	20,000
2001/02 F	260,000	16,000	276,000	14,000	240,000	2,000	20,000
Italy							
1998/99	2,243,000	20,000	2,263,000	520,000	1,393,000	350,000	0
1999/00	2,196,000	33,000	2,229,000	580,000	1,267,000	350,000	32,000
2000/01	2,206,000	31,000	2,237,000	585,000	1,242,000	390,000	20,000
2001/02 F	2,030,000	40,000	2,070,000	570,000	1,200,000	300,000	0
Netherlands							
1998/99	507,000	235,944	742,944	338,956	298,988	100,000	5,000
1999/00	575,000	338,891	913,891	434,050	317,717	147,599	14,525
2000/01	500,000	246,098	746,098	294,402	317,133	122,507	12,056
2001/02 F	475,000	255,000	730,000	286,000	316,000	117,000	11,000
Spain							
1998/99	721,600	210,800	932,400	63,700	688,700	160,000	20,000
1999/00	887,000	193,800	1,080,800	57,300	795,000	196,000	32,500
2000/01	698,500	272,700	971,200	55,600	725,000	170,000	20,600
2001/02 F	875,000	180,000	1,055,000	70,000	750,000	200,000	35,000
Sweden							
1998/99	60,600	87,421	148,021	1,239	141,782	5,000	0
1999/00	66,000	86,655	152,655	4,501	143,154	5,000	0
2000/01	68,000	86,398	154,398	1,328	148,070	5,000	0
2001/02 F	61,000	90,000	151,000	1,000	145,000	5,000	0
United Kingdom							
1998/99	202,500	460,000	662,500	19,600	615,000	27,700	200
1999/00	208,900	460,000	668,900	17,000	615,000	30,041	6,859
2000/01	162,200	455,850	618,050	13,400	582,450	22,000	200
2001/02 F	178,500	460,000	638,500	15,000	598,500	25,000	0
SUBTOTAL SELECTED EU COUNTRIES							
1998/99	8,257,846	2,002,463	10,260,309	1,967,385	6,231,916	1,923,700	137,308
1999/00	8,907,085	2,209,746	11,116,831	2,404,781	6,414,006	2,018,640	279,404
2000/01	9,402,142	2,060,093	11,462,235	2,265,950	6,697,473	2,266,007	232,805
2001/02 F	7,752,870	2,291,000	10,043,870	2,101,000	6,175,870	1,639,000	128,000
OTHER NORTHERN HEMISPHERE COUNTRIES							
Canada							
1998/99	523,380	120,000	643,380	80,000	368,380	195,000	0
1999/00	582,270	111,428	693,698	66,992	401,706	225,000	0
2000/01	532,218	120,692	652,910	62,914	404,996	185,000	0
2001/02 F	495,000	125,000	620,000	60,000	370,000	190,000	0

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TABLE 1
APPLES: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS)

Country	Production	Imports	Supply	Exports	Domestic	Processed	Withdrawals
Mktg. Year 1/			Utilization		Consumption		
China; Peoples Republic of							
1998/99	19,480,720	27,000	19,507,720	181,000	18,209,700	1,117,020	0
1999/00	20,801,641	21,532	20,823,173	180,939	19,394,136	1,248,098	0
2000/01	20,430,000	24,100	20,454,100	267,924	18,245,326	1,940,850	0
2001/02 F	20,050,000	34,856	20,084,856	281,851	17,647,630	2,155,375	0
Hungary							
1998/99	482,000	8,000	490,000	4,000	194,000	292,000	0
1999/00	420,000	6,000	426,000	6,000	160,000	260,000	0
2000/01	700,000	6,000	706,000	7,000	140,000	559,000	0
2001/02 F	420,000	7,000	427,000	6,000	120,000	301,000	0
Japan							
1998/99	879,100	250	879,350	2,684	741,066	135,600	0
1999/00	927,700	464	928,164	2,445	777,719	148,000	0
2000/01	799,600	2,405	802,005	2,246	670,759	129,000	0
2001/02 F	894,800	3,500	898,300	2,400	745,900	150,000	0
Mexico							
1998/99	370,244	133,721	503,965	0	443,965	60,000	0
1999/00	449,866	155,590	605,456	0	514,456	91,000	0
2000/01	338,245	187,760	526,005	0	456,005	70,000	0
2001/02 F	470,000	145,000	615,000	0	525,000	90,000	0
Poland							
1998/99	1,687,000	20,300	1,707,300	143,000	664,300	900,000	0
1999/00	1,704,000	22,500	1,726,500	187,300	619,200	920,000	0
2000/01	2,285,000	15,000	2,300,000	200,000	650,000	1,450,000	0
2001/02 F	2,350,000	10,000	2,360,000	250,000	660,000	1,450,000	0
Russian Federation							
1998/99	1,249,400	175,000	1,424,400	800	640,000	675,000	108,600
1999/00	964,500	148,435	1,112,935	1,220	493,700	590,000	28,015
2000/01	1,589,600	326,295	1,915,895	1,555	1,065,000	770,000	79,340
2001/02 F	1,270,000	330,000	1,600,000	2,000	800,000	770,000	28,000
Slovakia							
1998/99	83,500	30,400	113,900	2,200	75,000	36,000	700
1999/00	68,332	34,200	102,500	2,900	76,000	23,600	0
2000/01	81,497	27,000	107,000	4,000	78,000	25,000	0
2001/02 F	65,000	37,000	102,000	2,000	75,000	25,000	0
Taiwan							
1998/99	9,781	148,264	158,045	0	158,045	0	0
1999/00	7,970	126,934	134,904	0	134,834	0	70
2000/01	7,670	135,163	142,833	0	142,763	0	70
2001/02 F	7,575	118,000	125,575	0	125,505	0	70
Turkey							
1998/99	2,450,000	4,866	2,454,866	14,481	2,317,635	122,750	0
1999/00	2,500,000	3,559	2,503,559	13,883	2,364,676	125,000	0
2000/01	2,400,000	1,795	2,401,795	16,504	2,265,291	120,000	0
2001/02 F	2,400,000	1,000	2,401,000	18,000	2,263,000	120,000	0
United States 2/ 3/							
1998/99	5,282,724	149,654	5,432,378	666,454	2,380,165	1,973,129	412,630
1999/00	4,822,146	165,483	4,987,629	537,000	2,431,233	2,019,396	0
2000/01	4,830,311	163,630	4,993,941	750,531	2,372,339	1,871,071	0
2001/02 F	4,360,000	175,000	4,535,000	530,000	2,255,000	1,750,000	0
SUBTOTAL OTHER NORTHERN HEMISPHERE COUNTRIES							
1998/99	32,497,849	817,455	33,315,304	1,094,619	26,192,256	5,506,499	521,930
1999/00	33,248,425	796,125	34,044,518	998,679	27,367,660	5,650,094	28,085
2000/01	33,994,141	1,009,840	35,002,484	1,312,674	26,490,479	7,119,921	79,410
2001/02 F	32,782,375	986,356	33,768,731	1,152,251	25,587,035	7,001,375	28,070

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TABLE 1
APPLES: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS)

Country Mktg. Year 1/	Production	Imports	Supply Utilization	Exports	Domestic Consumption	Processed	Withdrawals
TOTAL NORTHERN HEMISPHERE COUNTRIES							
1998/99	40,755,695	2,819,918	43,575,613	3,062,004	32,424,172	7,430,199	659,238
1999/00	42,155,510	3,005,871	45,161,349	3,403,460	33,781,666	7,668,734	307,489
2000/01	43,396,283	3,069,933	46,464,719	3,578,624	33,187,952	9,385,928	312,215
2001/02 F	40,535,245	3,277,356	43,812,601	3,253,251	31,762,905	8,640,375	156,070
SOUTHERN HEMISPHERE COUNTRIES							
Argentina							
1998/99	1,316,035	11,858	1,327,893	179,723	330,172	817,998	0
1999/00	847,084	13,280	860,364	95,895	324,670	439,799	0
2000/01	1,330,800	8,000	1,338,800	198,000	358,000	782,800	0
2001/02 F	NA	NA	NA	NA	NA	NA	NA
Australia							
1998/99	334,000	0	334,000	26,402	158,500	149,098	0
1999/00	319,651	0	319,651	36,279	160,000	123,372	0
2000/01	303,000	0	303,000	37,000	135,000	131,000	0
2001/02 F	NA	NA	NA	NA	NA	NA	NA
Brazil							
1998/99	787,300	66,453	853,753	57,449	796,304	0	12,866
1999/00	967,064	38,205	1,005,269	64,479	940,790	0	5,931
2000/01	690,000	71,000	761,000	70,925	690,075	0	50,000
2001/02 F	NA	NA	NA	NA	NA	NA	NA
Chile							
1998/99	1,010,000	203	1,010,203	522,000	100,000	388,203	0
1999/00	760,000	60	760,060	387,700	98,360	274,000	0
2000/01	1,000,000	100	1,000,100	520,100	115,000	365,000	0
2001/02 F	NA	NA	NA	NA	NA	NA	NA
New Zealand							
1998/99	527,384	95	527,479	314,287	113,479	99,713	0
1999/00	577,705	95	577,800	357,000	70,000	150,800	0
2000/01	524,905	95	525,000	315,000	70,000	140,000	0
2001/02 F	NA	NA	NA	NA	NA	NA	NA
South Africa; Republic of							
1998/99	675,000	0	675,000	250,817	221,113	203,070	0
1999/00	612,989	0	612,989	207,268	196,193	209,528	0
2000/01	660,000	0	660,000	220,000	216,132	223,868	0
2001/02 F	NA	NA	NA	NA	NA	NA	NA
TOTAL SOUTHERN HEMISPHERE COUNTRIES							
1998/99	4,649,719	78,609	4,728,328	1,350,678	1,719,568	1,658,082	12,866
1999/00	4,084,493	51,640	4,136,133	1,148,621	1,790,013	1,197,499	5,931
2000/01	4,508,705	79,195	4,587,900	1,361,025	1,584,207	1,642,668	50,000
2001/02 F	NA	NA	NA	NA	NA	NA	NA
WORLD TOTAL							
1998/99	45,405,414	2,898,527	48,303,941	4,412,682	34,143,740	9,088,281	672,104
1999/00	46,240,003	3,057,511	49,297,482	4,552,081	35,571,679	8,866,233	313,420
2000/01	47,904,988	3,149,128	51,052,619	4,939,649	34,772,159	11,028,596	362,215
2001/02 F	NA	NA	NA	NA	NA	NA	NA

1/ Data for Northern Hemisphere countries are for a July/June marketing year, except for Mexico and France which are August/July. In the Southern Hemisphere the marketing year begins on January 1 of the second year indicated, except for Chile, where the year starts on February 1 of the second year indicated, and New Zealand, where the year starts in October 1 of the first year indicated. Data for Austria, Bulgaria, Denmark, Norway, Romania, and Serbia/Montenegro is not longer available.

2/ The U.S. 1998/99 "withdrawal" estimate captures an estimated 8 percent of the U.S. apple crop that was not utilized. The 8 percent mainly reflects fruit left on the trees because of low prices. The United States does not have a withdrawal program.

3/ U.S. import/export forecasts are based on trends during recent years and trade contacts.

F= Forecast

TABLE 2
U.S. APPLE EXPORTS
MARKETING YEARS 1996/97-2000/01
(JULY-JUNE)
METRIC TONS

Countries of Destination	2000/01 RANK	1996/97	1997/98	1998/99	1999/00	2000/01	Percent Changed 1999/00-2000/01
Mexico	1	89,659	63,115	119,442	155,057	224,133	45%
Taiwan	2	119,646	113,044	113,139	83,652	110,781	32%
Canada	3	90,464	96,868	92,172	83,945	95,391	14%
Hong Kong	4	46,056	47,372	44,200	23,238	48,440	108%
Indonesia	5	62,201	30,508	18,533	28,271	42,738	51%
United Kingdom	6	23,170	21,000	30,042	23,633	29,502	25%
United Arab Emirates	7	17,805	21,783	26,309	16,103	23,404	45%
Malaysia	8	25,833	13,896	14,346	7,343	19,304	163%
Saudi Arabia	9	19,503	23,169	41,437	15,241	17,487	15%
Venezuela	10	7,330	17,289	19,009	12,382	16,227	31%
Thailand	11	27,517	14,160	12,469	10,437	13,796	32%
Philippines	12	25,757	15,839	19,612	9,990	11,511	15%
Costa Rica	13	5,683	6,931	6,502	5,987	8,885	48%
Guatemala	14	7,083	6,854	7,001	6,090	8,420	38%
Dominican Republic	15	5,010	4,679	5,830	5,295	8,289	57%
Egypt	16	1,654	4,630	5,408	8,596	7,566	-12%
India	17	523	21	543	436	5,976	1271%
Singapore	18	12,311	6,432	10,610	4,283	5,626	31%
China	19	166	262	343	2,144	5,082	137%
Panama	20	3,232	3,569	2,952	2,481	4,458	80%
El Salvador	21	328	1,462	3,097	3,925	4,445	13%
Colombia	22	7,982	8,073	7,828	5,238	4,417	-16%
Israel	23	6,096	1,465	8,168	947	3,251	243%
Bangladesh	24	1,480	1,152	2,070	518	2,924	464%
Honduras	25	1,504	1,809	3,240	1,956	2,720	39%
Trinidad and Tobago	26	929	1,085	900	1,737	2,718	56%
Vietnam	27	1,734	956	1,153	804	2,682	234%
Kuwait	28	3,440	3,024	2,553	2,302	2,539	10%
Sweden	29	5,057	2,155	4,761	525	1,540	193%
Bahrain	30	512	948	818	1,187	1,370	15%
Russia	31	9,848	11,417	2,471	932	1,297	39%
Ecuador	32	2,213	3,464	1,278	101	1,266	1153%
Iceland	33	1,635	1,769	1,794	1,441	1,139	-21%
Yemen	34	0	0	17	238	972	308%
Finland	35	4,409	2,866	2,189	307	867	182%
Sri Lanka	36	1,039	1,611	2,750	607	837	38%
Japan	37	877	514	1,347	1,774	789	-56%
Netherlands	38	769	641	1,948	1,270	614	-52%
Cambodia	39	818	567	226	326	601	84%
Nicaragua	40	503	552	550	895	525	-41%
Brazil	41	16,009	4,315	4,722	608	511	-16%
Spain	42	119	45	7,205	198	507	156%
Barbados	43	147	450	734	348	505	45%
Greece	44	233	400	2,730	0	504	NA
Norway	45	924	779	1,060	169	361	114%
Ireland	46	1,454	964	511	725	360	-50%
Argentina	47	3,458	19	473	139	304	119%
Oman	48	0	40	479	271	271	0%
Peru	49	553	1,128	322	64	214	234%
Jamaica	50	119	106	236	8	204	2450%

continue--

TABLE 2
U.S. APPLE EXPORTS
MARKETING YEARS 1996/97-2000/01
(JULY-JUNE)
METRIC TONS

Countries of Destination	2000/01 RANK	1996/97	1997/98	1998/99	1999/00	2000/01	Percent Changed 1999/00-2000/01
Suriname	51	28	265	173	126	163	29%
Belize	52	94	73	99	48	157	227%
Guyana	53	531	417	274	97	153	58%
Haiti	54	522	1,076	973	919	136	-85%
Chile	55	0	196	120	129	129	0%
Slovenia	56	0	0	0	0	126	NA
French Pacific Islands	57	467	233	314	219	119	-46%
Bermuda	58	88	54	3	10	110	1000%
Netherlands Antilles	59	267	298	110	70	107	53%
The Bahamas	60	43	394	153	32	106	231%
Portugal	61	0	0	909	0	102	NA
New Zealand	62	120	96	90	273	100	-63%
Leeward-Windward Islands	63	33	151	253	60	93	55%
Papua New Guinea	64	0	0	0	0	86	NA
British Pacific Island	65	0	0	0	0	82	NA
Lebanon	66	0	0	16	0	81	NA
Germany	67	39	0	95	103	66	-36%
French West Indies	68	214	382	535	246	51	-79%
Pakistan	69	324	33	0	0	43	NA
Jordan	70	0	0	0	0	30	NA
France	71	19	33	0	0	25	NA
Bulgaria	72	0	0	0	0	21	NA
Switzerland	73	0	0	0	0	21	NA
Belgium-Luxembourg	74	296	18	305	0	21	NA
Malta & Gozo	75	57	0	135	0	21	NA
Qatar	76	0	38	338	62	20	-68%
Afghanistan	77	0	0	21	21	0	-100%
Algeria	78	0	85	0	0	0	NA
Brunei	79	20	59	21	0	0	NA
Burma	80	0	0	21	0	0	NA
Cayman Islands	81	53	81	0	0	0	NA
Denmark	82	0	41	319	0	0	NA
French Guiana	83	61	83	77	39	0	-100%
Italy	84	0	0	2,654	182	0	-100%
Kenya	85	62	0	0	0	0	NA
Macau	86	0	0	0	21	0	-100%
Malawi	87	0	0	0	20	0	-100%
Mauritius	88	0	0	0	0	0	NA
Romania	89	0	31	0	0	0	NA
Senegal	90	0	0	18	0	0	NA
Sierra Leone	91	0	189	0	22	0	-100%
South Africa	92	0	78	60	0	0	NA
Switzerland	93	0	0	0	0	0	NA
Ukraine	94	0	23	0	0	0	NA
Uruguay	95	18	75	66	0	0	NA
Other	96	0	137	105	0	92	NA
Grand Total		668,202	570,230	666,454	537,000	750,531	40%

Source: U.S. Bureau of the Census

World Table Grape Situation and Outlook

United States total fresh market grape production in 2001 is estimated at 700,000 metric tons, down about 15 percent from a year ago. California table grape production is expected to increase 3 percent in 2001 to about 726,000 metric tons. Total production during the 2001 season for selected Northern Hemisphere table grape producing countries is expected to decline slightly. U.S. table grape exports January through August 2001 posted a 22-percent increase over the same period a year ago with strong growth to Asian markets continuing.

Northern Hemisphere

United States

The 2001 U.S. table grape crop is expected to be up about 3 percent from last year, with levels reaching approximately 726,000 tons¹. California accounts for about 98 percent of U.S. production and about 11 percent of the world production.

Major year-over-year increases are being seen in exports of table grapes, particularly to Malaysia, Hong Kong, Indonesia and Singapore. Exports in 2001 are projected to increase 15 percent to 320,000 tons, due to increasing supply and strong demand throughout Asian markets. Likewise, the Market Access Program continues to be an important market development tool to stimulate demand and fuel table grape exports. During marketing year (MY) 2001, the U.S. Department of Agriculture/Foreign Agricultural Service and the California Table Grape Commission will share the cost of undertaking promotional activities in Asia, Latin America, and the United Kingdom. During January-August 2001, total exports reached 95,813 tons, up 22 percent from the same period in 2000. Asian markets continue their recovery from the economic crisis that began in 1998. According to the U.S. census data, Asian markets during 2000 represented about 41 percent of the total U.S. grape export market.

USDA has been working to obtain access to the Australian market for California table grapes for over ten years. Currently Australia cites concerns over the presence of the glassy winged sharpshooter and Pierce's disease in California and the market remains closed. The U.S. government believes these concerns to be scientifically unfounded, and efforts to resolve the issue are ongoing. Overall, California table grapes continue to be recognized around the world as a premium product and markets are continuing to expand.

¹About 23 percent of California table grapes are used for processing.

During January-August 2001, imports posted a 12- percent decline at 376,389 tons over the same period in 2000. Shipments from Chile declined due to smaller yields while Mexican shipments also declined due to unfavorable weather. Although the South African Rand continued to devalue, South African shipments to the United States declined 76 percent as falling prices in South Africa and lower economic returns to producers are causing great losses to their industry.

Greece

Continued favorable weather conditions during blooming and setting of the 2001 table grape crop increased estimated production for 2001 by 10 percent to 320,000 tons. Imports of table grapes are generally small as Greece only imports to acquire specific varieties not grown in Greece and during the off-season. Most imported product comes from the EU with small quantities sourced from Argentina and Chile.

Japan

Japan's grape production during 2001 is expected to decline just over 1 percent to 234,200 metric tons. Total Japanese imports this year are estimated to be 15,000 tons, up 11 percent from last year and up 67 percent from the 9,005 tons imported during 1999. California's Red Globe grapes are establishing a strong reputation for excellent quality. Chilean grape imports are complementing U.S. shipments counter-seasonally. Year round availability has helped to boost consumption.

China

Production in calendar year 2001 is expected to be 3.80 million tons, up 16 percent from the 3.28 million tons in 2000. Acreage planted in grape vines is growing along with grape processing, particularly for wine. However, at least for the short term, China remains a net importer of grapes. Despite improving distribution and storage infrastructure for fruit, reported post-harvest gaps still exist supporting continued growth in exports of U.S. table grapes to China. At the same time, trade contacts expect China to become a major competitor to U.S. exports in the next 2 to 5 years, particularly in Southeast Asia.

Most of China's grape production is made up of 12 different major varieties, Jufeng being the most popular. Red Globe acreage is mainly located on China's east coast. Within this area, growers have experienced some disease problems. Despite reports of efforts to increase the Red Globe production base, near term competition from the Red Globe is expected to be limited .

Mexico

Unfavorable weather conditions this year put table grape production estimates down 18,370 tons from 2000. However, sources indicate that area planted has been increasing although partially offset by fallowing of older acreage. Water shortages persist and, in addition to the lack of available credit, are considered a limiting factor in expansion efforts.

Mexican consumption is improving and imports are expected to post an 11-percent increase this year. U.S. table grape exports to Mexico through July of this year totaled 1,493 metric tons, up 27 percent from the same period in 2000. The stronger peso is helping to bolster this trend. Table grape imports from Chile are expected to be 38 percent of total imported grapes while those from the United States are expected to account for the remaining 62-percent market share this year. Because of counter seasonality, Chilean shipments do not directly compete with those from the United States. Chile usually exports to Mexico in June and July, while the United States exports primarily during August through December.

Spain

Production this year is expected to decline nearly 9 percent from 2000 due to heavy May rains and higher temperatures. Imported table grapes are mainly from Chile and Italy. Given Spain's supply situation this year, imports are expected to increase. Spain, a net exporter of table grapes, has a growing season parallel with the United States so regardless of consumption patterns, little trade opportunity exists. Spain has the largest land area planted under vines. Spain exports mainly to EU countries.

Southern Hemisphere

The data for selected southern hemisphere countries has been revised in the semi-annual fresh deciduous attaché reports. Please see the grape tables in the individual fresh deciduous reports for the revised data. The fresh deciduous fruit reports containing grape data are required only for Chile, China, Greece, Italy, Japan, Mexico, South Africa, Spain, and Turkey. However, voluntary reports from other countries may also be available.

(The FAS Attaché Report search engine contains reports on the deciduous fruit industries for more than 20 countries, including Japan, Mexico, and South Africa. For information on production and trade, contact Heather Page Velthuis at 202-720-9792. For information on marketing, contact Yvette Wedderburn Bomersheim at 202-720-0911. Also, check out our grape web page at: www.fas.usda.gov/htp/horticulture/grapes.html.)

TABLE GRAPES: PRODUCTION, SUPPLY, AND DISTRIBUTION

Country/ Year 1/	Production 2/	Imports 3/	Total Supply	Exports, Fresh Only 3/	Domestic Fresh Consumption	For Processing	Withdrawal from Market
Northern Hemisphere Countries							
Greece							
1999	287,000	1,413	288,413	102,458	135,955	50,000	0
2000	315,878	1,955	317,833	104,151	170,694	42,988	0
2001	320,000	1,500	321,500	110,000	151,500	60,000	0
Italy							
1999	1,562,000	12,000	1,574,000	578,000	696,000	300,000	0
2000	1,568,000	14,000	1,582,000	625,000	690,000	267,000	0
2001	1,580,000	14,000	1,594,000	635,000	689,000	270,000	0
Japan							
1999	242,000	9,005	251,005	24	219,481	31,500	0
2000	237,500	13,218	250,718	23	222,695	28,000	0
2001	234,200	15,000	249,200	20	219,180	30,000	0
China; Peoples Republic of							
1999	2,708,127	25,859	2,733,986	348	2,273,248	460,390	0
2000	3,280,000	44,156	3,324,156	437	2,691,519	632,200	0
2001	3,800,000	52,408	3,852,408	752	3,015,656	836,000	0
Mexico							
1999	185,615	51,896	237,511	107,830	129,681	0	0
2000	189,370	73,744	263,114	115,414	147,700	0	0
2001	171,000	82,000	253,000	95,000	158,000	0	0
Spain							
1999	370,200	21,000	391,200	100,000	255,000	30,000	6,200
2000	351,000	19,200	370,200	111,000	236,000	20,000	3,200
2001	320,000	25,000	345,000	95,000	230,000	19,000	1,000
Turkey							
1999	3,400,000	233	3,400,233	47,980	1,652,253	1,700,000	0
2000	3,600,000	173	3,600,173	64,873	1,750,300	1,785,000	0
2001	3,500,000	100	3,500,100	70,000	1,700,100	1,730,000	0
United States							
1999	687,646	383,672	1,071,318	238,987	528,781	158,760	144,790
2000	701,254	469,749	1,171,003	290,309	556,114	145,152	179,428
2001	725,748	414,000	1,139,748	321,705	533,869	135,000	149,174
Subtotal							
1999	6,734,461	479,219	7,213,680	1,175,279	3,617,151	2,270,260	150,990
2000	6,963,002	592,039	7,555,041	1,310,770	3,773,503	2,288,140	182,628
2001	6,850,948	551,600	7,402,548	1,326,725	3,681,649	2,244,000	150,174
Southern Hemisphere Countries							
Chile							
1999	815,000	97	815,097	473,525	93,000	248,572	0
2000	935,000	16	935,016	596,000	95,000	244,016	0
2001	955,000	50	955,050	580,000	96,000	279,050	0
South Africa; Republic of							
1999	227,671	0	227,671	183,716	39,378	4,577	0
2000	218,410	0	218,410	186,410	30,000	2,000	0
2001	220,000	0	220,000	186,500	31,000	2,500	0
Subtotal							
1999	1,042,671	97	1,042,768	657,241	132,378	253,149	0
2000	1,153,410	16	1,153,426	782,410	125,000	246,016	0
2001	1,175,000	50	1,175,050	766,500	127,000	281,550	0
Total Selected Countries							
1999	7,777,132	479,316	8,256,448	1,832,520	3,749,529	2,523,409	150,990
2000	8,116,412	592,055	8,708,467	2,093,180	3,898,503	2,534,156	182,628
2001	8,025,948	551,650	8,577,598	2,093,225	3,808,649	2,525,550	150,174

1/ Calendar year for all countries.

2/ U.S. production data represents California only.

3/ U.S. exports and imports are from the Bureau of the Census with forecasts by the USDA/Foreign Agricultural Service.

TABLE GRAPES: U.S. EXPORTS 1/

Destination	1996	1997	1998	1999	2000	Jan-Aug '00	Jan-Aug '01	Jan-Aug '01/'00
	---Metric Tons---					-- % Change --		
Canada	87,042	97,396	81,505	89,508	95,532	35,967	33,696	-6%
Hong Kong	38,547	58,548	31,569	37,017	35,370	12,294	16,412	33%
Malaysia	5,858	7,551	3,005	3,589	10,997	1,662	14,283	759%
Mexico	10,859	23,920	24,007	30,881	40,187	5,910	4,485	-24%
United Kingdom	4,412	5,609	6,934	8,762	11,258	4,394	4,382	-0%
Philippines	12,734	15,903	6,411	14,066	13,376	3,504	4,228	21%
Taiwan	16,326	11,962	8,756	16,629	20,428	3,680	3,712	1%
Singapore	4,575	5,357	4,631	3,651	6,584	2,201	3,284	49%
Indonesia	4,873	5,316	601	1,904	4,328	982	1,546	57%
China	28	454	5,680	928	9,105	1,830	1,520	-17%
All Others	29,461	38,633	32,153	32,052	43,144	5,792	8,265	43%
Total	214,715	270,649	205,252	238,987	290,309	78,216	95,813	22%

TABLE GRAPES: U.S. IMPORTS 1/

Origin	1996	1997	1998	1999	2000	Jan-Aug '00	Jan-Aug '01	Jan-Aug '01/'00
	---Metric Tons---					-- % Change --		
Chile	292,896	272,333	289,233	274,935	359,678	322,324	290,470	-10%
Mexico	60,033	75,713	101,044	87,632	90,749	90,690	77,561	-14%
Argentina	0	0	286	630	2,392	2,392	5,242	119%
South Africa; Republic of	3,218	7,450	10,122	13,591	10,393	10,393	2,443	-76%
Peru	254	75	0	55	265	103	517	402%
Italy	194	1,142	958	843	1,492	65	113	74%
Brazil	0	12	0	41	329	299	31	-90%
Canada	2,945	3,202	4,152	5,910	4,447	0	12	n/a
All Others	286	1	26	35	0	2	0	-100%
Total	359,826	359,928	405,821	383,672	469,749	426,268	376,389	-12%

1/ Calendar year for all countries.

SOURCES: U.S. Agricultural Attaché Reports and Bureau of the Census with forecasts by the Foreign Agricultural Service/USDA.

Canned Deciduous Fruit Situation in Selected Countries

Production of canned peaches in selected countries for 2001/2002 is estimated at 1.14 million tons, down 4 percent from the revised estimate of 1.19 million tons produced in 2000/2001. World exports for the selected countries 2001/2002 are forecasted at 629,000 tons, down less than one percent from the preceding year. Canned pear production for 2001/2002 is forecast at 131,000 tons, down 3 percent from the previous year. Exports of canned pears for 2001/2002 are estimated at 76,000 tons, down 6 percent from last year's level.

Regional and Country Highlights

The canned deciduous fruit sector is suffering a market crisis throughout the world due principally to an overproduction of canned peaches, low prices, and increased competition among the principal exporters: Greece, South Africa, Chile, and Australia.

Greece

The 2001 peach crop is down from last year due to the mild winter, warm spring and hail storms beginning in April. Nevertheless, the quality of the crop is good and even better than that of last year when the size of the fruit was small. Production for 2001/02 is estimated at 367,000 tons, down by 22,000 tons from our April forecast and down from the two previously record breaking levels of 397,000 tons in 2000 and 441,000 tons in 1999. Despite record breaking exports of 400,000 tons during the 2001 marketing year, carry over stocks are at 87,000 tons, the second largest after the 102,000 tons in the preceding year. The Greek total supply is placed at 455,000 tons, the second largest after last year. Consequently, exports for the upcoming 2001/02 marketing year are estimated at 385,000 tons, the third largest on record.

Greek prices last year were extremely low, resulting in large exports and causing some unfavorable tariff actions against Greek shipments. Argentina initiated a countervailing duty levy of 12 percent on top of a 35 percent tariff and a \$0.5/kg safeguard measure. Brazil initiated an anti-dumping duty of 100 percent on top of 16.5 percent tariff and an additional tariff of 55 percent for a special listing of the product on an exception list. The loss of these two markets contributed to expanded shipments into the United States. Other factors assisting these exports were a low domestic Greek price and an appreciating U.S. dollar.

Italy

Italian canned peach, pear and mixed fruit output for 2001/02 is estimated at 22,000, 34,000 tons and 68,000 tons respectively. Although growing conditions are favorable so far this year, the output of canned peaches is forecast to decline further because processors prefer to import Greek peaches in bulk for repackaging under their own labels. The arrangement allows Italian canners to benefit in the export market by using lower cost Greek product in their mixed fruit line. It also provides the canners with leverage to negotiate a lower price from domestic processors.

The competitive price of Greek canned peaches on the international market resulted in a rebuilding of large stocks. In fact, Italian imports increased by 5,500 tons to total 25,000 tons during marketing year 2000/01, whereas exports declined by 5,000 tons to total 32,000 tons in the same period. Due to large stocks, Italian canned peach imports are forecast to decline in 2001/02 whereas exports should remain stable.

Canned pear output for 2001/02 is forecast to decline by 2,000 tons to total 34,000 tons due to a decline in fruit production. The Italian canned mixture production will be marginally affected by a decline in pear and apple production because peach production remained quite stable, and pineapples are imported.

Italian exports of canned pears and mixtures increased in marketing year 2000/01 despite a decline in fruit mixture output. In fact, Italian canned pears and mixtures remain competitive on the international market, due to the quality of Italian pears and their relatively low prices. However, these exports are forecast to decline in 2001/02 due to reduced domestic production.

From the marketing standpoint, canned peaches and pears are generally considered to be a mature food product with little room for growth due to competition from fresh fruit imports, which are increasingly available throughout the year. Fruit cocktail, however, is considered to be a convenience food that still offers market opportunities, especially in export markets. Canned pears and peaches are destined almost exclusively for the catering industry in Italy, while canned mixtures are still consumed by families.

South Africa

South Africa's fruit canning industry is the fourth largest in the world. The domestic industry is made up of four main canners, Langerberg foods, Sapco of Delmonte Brand, Ashton, and Rhodes Fruit Farm Foods. Exports account for 90 percent of all canned fruit production. Over half of South Africa's exports go to Europe.

Calendar year 2001 canned production (peaches, pears, apricots, and mixed fruit) is estimated at 183,500 tons, up 11 percent from a year earlier due to a return to more normal weather and diversion of more fruit to canning. More fruit went to processing because of stricter EU quality standards for fresh fruit which limit South Africa's fresh shipments. Exports are expected to rise by 12 percent to about 148,800 tons while domestic consumption will drop by 5 percent to 36,000 tons. Of the total fresh fruit delivered for processing, about 47,000 tons was apricots, 114,000 tons peaches, 86,000 tons pears, and 247,000 tons

mixed fruit. Stricter regulations have also resulted in delays in shipments as well as an increase in ending stocks.

Australia

Production of canned peaches for the 2001/02 marketing year is forecast at 45,650 tons, up about 2 percent or 800 tons from the revised estimate of 44,820 tons produced last year. The upward forecast is based upon industry reports of new plantings.

Exports of canned peaches for calendar year 2001 are forecast to increase by 9 percent to total 9,436 tons compared to the level achieved during the previous year. While this increase is significant, exports remain well below levels achieved during the 1980s, when average annual exports of over 20,000 tons were achieved. In recent years exports have remained low due to continued tough competition from subsidized EU exports on world markets. Exports to the United States are forecast to increase dramatically from the extremely low levels of the previous year, driven by a favorable exchange rate

Cannery intake for pears in calendar year 2002 is forecast to rise slightly to 54,000 tons. Dry conditions at flowering and a lack of subsoil moisture have not significantly affected yield potential at this stage, but may have restricted fruit size to average levels. Irrigation allocations have previously been low in some valleys but were recently revised upwards to average levels. Canned pear production for calendar year 2002 is also forecast to rise slightly to 44,820 tons from 44,405 tons canned last season.

Industry sources indicate that canneries tend to view the domestic market as the primary market. Initiatives such as innovations in product packaging and product promotion are developed and targeted at the domestic market. Surplus production is typically exported because canners do not wish to compete for the "commodity end" of the export market (bulk markets) because this would bring them into direct competition with subsidized product.

The three canneries currently processing fruit in Australia are SPC, Ardmona and Berri. According to industry sources, SPC is the largest and currently processes around 50 percent of the peach crop and around 54 percent of the pear crop. Ardmona is the other major processor, accounting for around 41 percent of the peach crop and 46 percent of the pear crop. Berri is a minor player, processing only 9 percent of the peach crop. SPC a publicly listed company and Ardmona a grower owned cooperative are currently negotiating a merger. While the details of this merger are currently not clear, it appears that SPC will buy out Ardmona with the name of the company becoming SPC Ardmona Ltd. The proposal is yet to gain approval of the Australian Competition and Consumer Commission (ACCC), which has the power to determine whether the merger is anti-competitive.

The reason behind the merger is that both companies need to increase size in order to take advantage of export opportunities. Also, each company has focused on different aspects of production. SPC in recent years has dramatically improved its packaging and presentation of its product to enhance consumer

perceptions while Ardmona has improved its sorting capacity and fruit quality. Since these aspects of canned fruit production complement each other, the merger would improve efficiency and increase export opportunities.

Chile

The initial production forecast for canned Chilean peaches in marketing year 2001/02 indicates a level similar to the previous year's output. Although it is still too early to predict with certainty, enough rain and sufficient cold hours in all growing areas is expected to assure an excellent budding, which will have a positive effect on the upcoming production. Estimated production for marketing year 2000/01 remains unchanged from the April forecast of 46,000 tons. Stock levels will be abnormally high at the end of the marketing year due to reduced exports.

For marketing year 2000/01, exports of canned peaches will end the year below both the previous year and our previous estimates. This is mainly due to the loss of the Mexican market resulting from increased competition of the Greek canned peaches. Additionally, exports to Argentina, Chile's third largest export market have come to a stop. Argentina, which is facing a major economic crisis, decided to protect their domestic production by increasing import duties for non-Mercosur members countries to 28 percent. This includes Chile since it is only an "associate" member. Additionally, a safeguard is applied to all canned peach imports bringing the actual Argentine tariff rate to an estimated 90 percent. Chile's exports for marketing year 2001 are initially forecast to recover based on lower production prices.

The FAS Attache Report search engine contains reports on the Canned Deciduous Fruit. For information on production and trade, contact Robert Knapp at 202-720-4620. For information on marketing contact Kristan Kezar at 202-609-0556.)

CANNED PEACHES: PRODUCTION, SUPPLY AND DISTRIBUTION

Country	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks
--Metric Tons Net Weight 1/ --							
Greece							
1999/2000	5,506	441,000	1,500	448,006	335,500	10,506	102,000
2000/01	102,000	397,000	1,000	500,000	400,000	13,000	87,000
2001/02	87,000	367,000	1,000	455,000	385,000	13,000	57,000
Italy							
1999/2000	0	41,000	19,500	60,500	37,000	12,000	11,500
2000/01	11,500	26,500	25,000	63,000	32,000	11,000	20,000
2001/02	20,000	22,000	20,000	62,000	32,000	10,000	20,000
Spain							
1999/2000	14,700	182,000	5,054	201,754	76,504	104,900	20,350
2000/01	20,350	165,000	4,839	190,189	72,002	102,700	15,487
2001/02	15,487	170,000	4,439	189,926	75,000	103,000	11,926
United States							
1999/2000	75,730	357,216	26,229	459,175	20,197	381,619	57,359
2000/01	57,359	350,888	47,859	456,106	14,171	401,110	40,825
2001/02	40,825	325,557	52,650	419,032	11,340	387,300	20,392
Australia							
1999/2000	8,478	41,465	282	50,225	8,399	32,526	9,300
2000/01	9,300	44,820	445	54,565	9,436	35,529	9,600
2001/02	9,600	45,650	500	55,750	10,568	35,582	9,600
Chile							
1999/2000	1,778	43,500	105	45,383	38,564	6,500	319
2000/01	319	46,000	168	46,487	35,000	7,000	4,487
2001/02	4,487	46,000	50	50,537	40,000	7,000	3,537
Argentina							
1999/2000	0	62,320	12,220	74,540	935	72,000	1,605
2000/01	1,605	70,520	498	72,623	880	71,000	743
2001/02	743	72,980	450	74,173	1,230	71,000	1,943
South Africa							
1999/2000	5,922	80,400	518	86,840	47,200	19,000	20,640
2000/01	20,640	87,600	250	108,490	69,000	19,100	20,390
2001/02	20,390	90,000	270	110,660	74,000	19,500	17,160
Total							
1999/2000	112,114	1,248,901	65,408	1,426,423	564,299	639,051	223,073
2000/01	223,073	1,188,328	80,059	1,491,460	632,489	660,439	198,532
2001/02	198,532	1,139,187	79,359	1,417,078	629,138	646,382	141,558

Note: For Calendar year reference, MY 1999/00 would become Cy 1999

1/ One metric ton equals 48,99 standard 45-lb. cases net of 24x2 1/2 cans

Source U.S. Agricultural Attache Reports

CANNED PEARS: PRODUCTION, SUPPLY AND DISTRIBUTION

Country	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks
--Metric Tons Net Weight 1/ --							
Australia							
1999/2000	7,671	44,820	40	52,531	18,141	29,190	5,200
2000/01	5,200	44,405	47	49,652	14,019	29,800	5,833
2001/02	5,833	44,820	50	50,703	14,000	30,100	6,603
Spain							
1999/2000	8,200	36,200	318	44,718	9,413	27,800	7,505
2000/01	7,505	34,500	474	42,479	7,583	24,183	10,713
2001/02	10,713	30,000	500	41,213	8,000	25,000	8,213
Italy							
1999/2000	20,000	34,000	6,000	60,000	34,000	10,000	16,000
2000/01	16,000	36,000	2,000	54,000	39,000	9,000	6,000
2001/02	6,000	34,000	4,000	44,000	35,000	8,000	1,000
South Africa							
1999/2000	9,826	19,800	0	29,626	18,498	4,200	6,928
2000/01	6,928	20,700	0	27,628	19,700	4,250	3,678
2001/02	3,678	22,500	0	26,178	18,700	4,400	3,078
Total							
1999/2000	45,697	134,820	6,358	186,875	80,052	71,190	35,633
2000/01	35,633	135,605	2,521	173,759	80,302	67,233	26,224
2001/02	26,224	131,320	4,550	162,094	75,700	67,500	18,894

Note: For Calendar year reference, MY 1999/00 would become Cy 1999

1/ One metric ton equals 48,99 standard 45-lb. cases net of 24x2 1/2 cans

Source U.S. Agricultural Attache Reports

U.S. IMPORTS OF CANNED PEACHES
Marketing Year June/May

Origin	1996/97	1997/98	1998/99	1999/2000	2000/01
--Metric Tons Net Weight 1/ --					
Greece	19,475	4,586	6,715	20,077	35,437
Spain	4,324	11,424	1,971	1,993	3,122
South Africa	2,717	3,863	1,531	474	4,390
Chile	1,166	447	69	2,388	1,654
China	244	728	1,064	369	881
Japan	69	7	0	0	0
France	56	102	46	95	133
Italy	19	13	25	0	59
Other	17	814	2,487	833	2,183
Grand Total	28,087	21,984	13,908	26,229	47,859

1/ One metric ton equals 48.99 cases standard cases of 24 x 2 1/2 cans

Source: U.S. Census Bureau

U.S. EXPORTS OF CANNED PEACHES
Marketing Year June/May

Destination	1996/97	1997/98	1998/99	1999/2000	2000/01
--Metric Tons Net Weight 1/ --					
Canada	4,192	7,452	6,248	8,043	5979
Mexico	451	950	4,154	5,395	220
Japan	2,559	2,917	2,475	2,248	1083
Korea	1,593	569	1,220	1,142	1541
Taiwan	1,295	912	1,036	346	392
Singapore	900	228	110	141	63
Hong Kong	809	287	197	47	56
Philippines	442	119	650	91	828
Costa Rica	494	581	619	450	343
Germany	233	346	265	101	0
Guatemala	217	188	226	383	216
El Salvador	214	218	245	273	243
Saudi Arabia	201	467	151	154	221
Russia	1,077	579	5	0	0
Other	1,329	3,184	10,133	1,383	2,986
Grand Total	16,006	18,997	27,734	20,197	14,171

1/ One metric ton equals 48.99 cases standard cases of 24 x 2 1/2 cans

Source: U.S. Census Bureau

U.S. EXPORTS OF CANNED PEARS
Marketing Year June/May

Destination	1996/97	1997/98	1998/99	1999/2000	2000/01
--Metric Tons Net Weight 1/ --					
Canada	2,703	3,261	3,293	3,501	2,917
Mexico	77	14	0	23	0
Germany	115	95	96	0	0
United Kingdom	85	219	0	0	20
Japan	311	290	528	279	410
Hong Kong	49	6	128	87	0
Singapore	41	10	3	2	94
Thailand	39	22	17	8	1,260
Malaysia	31	19	18	6	0
Russia	43	0	0	0	108
Saudi Arabia	15	58	29	3	0
United Arab Emirates	0	390	662	426	0
Other	197	323	214	254	1,032
Grand Total	3,706	4,707	4,988	4,589	5,841

1/ One metric ton equals 48.99 cases standard cases of 24 x 2 1/2 cans
Source: U.S. Census Bureau

U.S. EXPORTS OF CANNED FRUIT MIXTURES
Marketing Year June/May

Destination	1996/97	1997/98	1998/99	1999/2000	2000/01
--Metric Tons Net Weight 1/ --					
Canada	7,422	8,512	10,432	10,273	4,653
Mexico	185	520	362	374	876
Japan	3,555	2,928	3,681	3,876	2,081
Philippines	3,804	700	633	640	628
Hong Kong	1,970	606	506	414	212
Singapore	1,826	999	817	567	455
Taiwan	416	626	814	355	104
Korea	421	689	500	547	158
Panama	597	1,148	802	844	593
El Salvador	337	379	486	447	479
Costa Rica	834	1,230	1,063	868	763
Saudi Arabia	820	1,182	1,022	186	659
Other	2,762	2,841	4,207	3,109	1,756
Grand Total	24,949	22,360	25,325	22,500	13,417

1/ One metric ton equals 48.99 cases standard cases of 24 x 2 1/2 cans
Source: U.S. Census Bureau

Northern Hemisphere Pear Situation and Outlook

Pear production in selected Northern Hemisphere countries in 2001/02 is forecast at 12.7 million tons, practically unchanged from the 2000/01 output. While production is forecast larger in China, smaller crops are expected in the United States and in Italy, which is the major pear producing country in the European Union (EU). In China, pear production in 2001/02 is forecast to increase 5 percent to a record 8.8 million tons, the result of expanded acreage in the southern part of the country. On the other hand, pear output in Italy is expected to decline 6 percent in 2001/02 to 824,000 tons. The overall U.S. pear crop in 2001/02 is forecast to fall for the second consecutive season to 830,000 tons, 5 percent below the 2000/01 output and the lowest level since 1996/97. Northern Hemisphere countries' pear exports in 2001/02 are forecast at about 920,000 tons, down 3 percent from the previous season's shipments. Lower shipments anticipated from major exporting countries, such as the United States, the Netherlands, and Italy, will likely more than offset increased export prospects in main exporters, including China and Spain. U.S. pear exports in 2001/02 are forecast at 150,000 tons, 11 percent below the record shipments posted in the 2000/01 season. Pear shipments from the United States this season would likely be hampered by a smaller pear crop and anticipated higher prices, combined with the gloomy economic situation expected in important customer markets. Nevertheless, U.S. pear exports in 2001/02 will continue to benefit from the industry's market promotion efforts.

Production

Northern Hemisphere pear production to increase slightly in 2001/02

Pear production in selected Northern Hemisphere countries in 2001/02 is forecast at 12.7 million metric tons, a slightly upward changed from the 2000/01 output. While production is forecast to increase in *China*, the world's major producer, smaller crops are anticipated in the *United States* and *Italy*.

China's pear production is forecast to increase 5 percent in 2001/02 to a record 8.8 million tons. Expanded acreage in the southern region of the country and overall favorable weather is expected to contribute to the upward trend in 2001/02. Hebei is the leading pear-producing province, accounting for a third of the total Chinese pear crop. Ya pears are the most popular variety grown, with a 30 percent production share.

Italy's pear production, the largest in the EU, is expected to decline 6 percent in 2001/02 to 824,000 tons. Unfavorable weather conditions, including hailstorms, have adversely affected production and fruit quality of the 2001/02 Italian pear crop. The region of Emilia-Romagna in Northern Italy continues to account for the bulk of total Italian pear production. Abate and Williams are the two major pear varieties grown in Italy.

U.S. pear production in 2001/02 is forecast to decrease 5 percent to 830,000 tons. The downturn mainly reflects lower production of Barlett pears for the second consecutive season. Production of U.S. Barletts in 2001/02 is forecast at nearly 430,000 tons, down 9 percent from the 470,000 tons produced in 2000/01. The ongoing economic difficulties facing the processing industry in northern California will likely continue to divert more Barlett pears to the fresh domestic and export markets in 2001/02. Barlett pears are the main variety produced in the United States, normally accounting for more than half of the pear crop. California accounts for half the U.S. Barlett pear crop.

Trade

Northern Hemisphere pear exports forecast to decrease in 2001/02

Northern Hemisphere pear exports in 2001/02 are forecast at about 920,550 tons, down 3 percent from the previous season's shipments. Decreased exports are anticipated from *the United States, the Netherlands, and Italy*. On the other hand, pear shipments from *China* and *Spain* are forecast to increase 19 percent and 41 percent, respectively. These countries in 2001/02 will likely benefit from expected larger crops and the related increase in exportable supplies.

China's pear exports are forecast to increase to more than 167,000 tons in 2001/02, mainly the result of a larger crop. Pear shipments from China have increased considerably in recent years and are becoming more important to Chinese pear growers. For example, China exported about 141,000 tons of pears in 2000/01, compared to practically nothing 10 years ago. Fruit quality in China continues to improve, contributing to the expansion of China's exports to Southeast Asian countries and Russia.

Dutch pear exports in 2001/02 are forecast at 155,000 tons, 5 percent below shipments in 2000/01. A much smaller pear crop will likely limit Dutch pear shipments in 2001/02. The United Kingdom is by far the most important destination for Dutch pears, followed by Russia, Sweden, France, and Norway. The Netherlands is also a transshipment venue for fruit trade in the EU. Almost all Chilean pears destined for the EU market are traded via the Netherlands. Approximately 80 percent of Dutch pear exports consist of the variety "Conference."

Italy's pear exports are forecast to decrease slightly to 130,000 tons in 2001/02. Germany is Italy's major pear market, accounting for about half of Italy's shipments.

U.S. pear shipments in 2001/02 are forecast at 150,000 tons, down 11 percent from the record 168,000 tons shipped in 2000/01. Pear shipments from the United States this season will likely be hampered by a smaller pear crop and anticipated higher prices combined, with the gloomy economic situation expected in many important customer markets. Nevertheless, U.S. pear exports in 2001/02 will continue to benefit from the industry's market promotion efforts and from funds assigned under the Market Access Program (MAP), which in fiscal year 2002 are estimated at \$1.2 million. Exports have become vital for the success of the U.S. pear industry. Today, the percentage of U.S. pear production going into export has increased

dramatically, generating a larger share of the income of pear farmers. Canada and Mexico together account for more than three-quarters of total U.S. pear shipments.

U.S. pear exports in 2000/01 set record volume and value

U.S. pear exports in 2000/01 totaled nearly 168,000 tons, valued at \$93 million, both records. Larger supplies of fresh-marketed pears and continued strong demand from important customers, such as Mexico, boosted U.S. pear exports in 2000/01. The diversion of processing pears into the fresh market contributed to the expansion on fresh-marketed supplies in 2000/01. The success in U.S. pear shipments reflects the completion of trade agreements, such as NAFTA, increased promotion activities under MAP, and more foreign demand for healthy foods, including pears. Mexico has emerged as the top destination for U.S. pear sales. Other key markets include Canada, Brazil, Venezuela, and Taiwan. In 2000/01, 20 percent of the total U.S. pear crop was exported compared to 5 percent in 1987/88. Moreover, the share of U.S. exports as a percentage of pears produced for fresh use only reached more than 30 percent in 2000/01. Continued supplies of good quality fruit, strong demand from leading customers, and market promotion efforts should continue to support strong U.S. pear sales in foreign markets.

Southern Hemisphere

The forecast for the Southern Hemisphere countries for 2001/02 season (harvest in 2002) will be available in the March 2002 issue of *World Horticultural Trade & U.S. Export Opportunities*.

(The FAS Attache Report search engine contains reports on the Deciduous Fruit industries for more than 20 countries, including China, Italy, and France. For further information on production and trade, contact Samuel Rosa at 202-720-6086. For information on marketing, contact Ted Goldamer at 202-720-8498. Also, visit the pear web page at: <http://www.fas.usda.gov/htp/horticulture/pear.html>)

TABLE 1
PEARS: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS)

Country Mktg. Year 1/	Production	Imports	Supply Utilization	Exports	Domestic Consumption	Processed	Withdrawals
NORTHERN HEMISPHERE COUNTRIES							
EUROPEAN UNION (EU)							
Belgium-Luxembourg							
1998/99	152,660	74,321	226,981	165,915	45,847	14,250	969
1999/00	165,220	66,425	231,645	171,205	45,610	14,000	830
2000/01	182,559	60,000	242,559	185,000	47,149	10,000	410
2001/02 F	79,775	100,000	179,775	129,000	45,775	5,000	0
France							
1998/99	246,100	88,000	334,100	45,000	229,100	45,000	15,000
1999/00	287,400	90,000	377,400	51,800	240,600	45,000	40,000
2000/01	264,000	95,000	359,000	33,900	271,700	45,000	8,400
2001/02 F	245,000	100,000	345,000	30,000	265,000	45,000	5,000
Germany							
1998/99	55,000	190,946	245,946	8,501	235,746	1,679	20
1999/00	54,042	167,770	221,812	8,754	211,892	1,163	3
2000/01	65,162	150,757	215,919	10,654	203,039	2,184	42
2001/02 F	45,000	170,000	215,000	8,500	205,750	750	0
Greece							
1998/99	66,000	17,000	83,000	1,400	72,900	8,400	300
1999/00	66,000	17,000	83,000	1,400	72,950	8,400	250
2000/01	60,000	14,000	74,000	1,500	63,250	9,000	250
2001/02 F	55,000	15,000	70,000	1,000	59,800	9,000	200
Italy							
1998/99	1,115,000	60,000	1,175,000	200,000	865,000	110,000	0
1999/00	784,000	115,000	899,000	123,000	688,000	80,000	8,000
2000/01	876,000	98,000	974,000	139,000	725,000	100,000	10,000
2001/02 F	824,000	100,000	924,000	130,000	704,000	90,000	0
Netherlands							
1998/99	140,000	95,250	235,250	145,054	84,996	5,000	200
1999/00	135,000	126,428	261,428	174,855	76,941	9,632	0
2000/01	195,000	108,375	303,375	163,290	126,101	13,984	0
2001/02 F	70,000	180,000	250,000	155,000	85,000	10,000	0
Spain							
1998/99	557,000	40,900	597,900	92,300	455,600	35,000	15,000
1999/00	682,500	24,500	707,000	138,000	499,000	40,000	30,000
2000/01	595,000	45,500	640,500	92,000	480,000	45,000	23,500
2001/02 F	665,000	20,000	685,000	130,000	490,000	45,000	20,000
Sweden							
1998/99	16,300	33,386	49,686	228	49,458	0	15,000
1999/00	12,771	31,684	44,455	129	44,326	0	30,000
2000/01	13,375	27,449	40,824	256	40,568	0	23,500
2001/02 F	11,825	31,000	42,825	100	42,725	0	20,000
United Kingdom							
1998/99	28,727	130,656	159,383	3,000	155,833	400	150
1999/00	18,052	133,000	151,052	2,500	148,052	400	100
2000/01	34,031	119,624	153,655	3,280	149,875	400	100
2001/02 F	28,500	125,000	153,500	3,000	150,000	400	100

continued-

TABLE 1
PEARS: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS)

Country Mktg. Year 1/	Production	Imports	Supply Utilization	Exports	Domestic Consumption	Processed	Withdrawals
SUBTOTAL EU							
1998/99	2,376,787	730,459	3,107,246	661,398	2,194,480	219,729	46,639
1999/00	2,204,985	771,807	2,976,792	671,643	2,027,371	198,595	109,183
2000/01	2,285,127	718,705	3,003,832	628,880	2,106,682	225,568	66,202
2001/02 F	2,024,100	841,000	2,865,100	586,600	2,048,050	205,150	45,300
OTHER NORTHERN HEMISPHERE COUNTRIES							
Canada							
1998/99	16,760	72,000	88,760	900	82,960	4,900	0
1999/00	17,419	70,670	88,089	779	82,610	4,700	0
2000/01	15,072	72,009	87,081	465	82,116	4,500	0
2001/02 F	17,000	75,000	92,000	500	86,900	4,600	0
China; Peoples Republic of							
1998/99	7,275,464	800	7,276,264	108,900	6,803,564	363,800	0
1999/00	7,742,331	9,750	7,752,081	109,004	7,186,277	456,800	0
2000/01	8,400,000	650	8,400,650	140,820	7,839,830	420,000	0
2001/02 F	8,820,000	620	8,820,620	167,257	8,212,363	441,000	0
Japan							
1998/99	409,700	481	410,181	5,396	404,285	500	0
1999/00	415,700	309	416,009	4,169	411,340	500	0
2000/01	423,800	576	424,376	3,191	420,685	500	0
2001/02 F	411,800	600	412,400	3,000	408,900	500	0
Mexico							
1998/99	25,690	54,800	80,490	0	78,490	2,000	0
1999/00	33,352	74,158	107,510	0	105,510	2,000	0
2000/01	32,000	104,000	136,000	0	134,000	2,000	0
2001/02 F	33,500	110,000	143,500	0	141,500	2,000	0
Russian Federation							
1998/99	181,300	70,000	251,300	50	195,000	55,000	1,250
1999/00	136,600	77,430	214,030	80	162,000	51,000	950
2000/01	190,400	101,320	291,720	155	226,000	60,400	5,165
2001/02 F	200,000	105,000	305,000	200	240,300	60,000	4,500
Turkey							
1998/99	360,000	84	360,084	8,267	333,817	18,000	0
1999/00	360,000	151	360,151	12,204	329,947	18,000	0
2000/01	380,000	118	380,118	11,707	349,411	19,000	0
2001/02 F	370,000	50	370,050	13,000	338,550	18,500	0
United States 2/							
1998/99	880,097	86,424	966,521	138,282	416,377	411,862	0
1999/00	921,202	90,263	1,011,465	152,954	425,547	432,964	0
2000/01	877,385	85,094	962,479	167,903	429,851	364,725	0
2001/02 F	830,000	90,000	920,000	150,000	420,000	350,000	0
SUBTOTAL OTHER NORTHERN HEMISPHERE COUNTRIES							
1998/99	9,149,011	284,589	9,433,600	261,795	8,314,493	856,062	1,250
1999/00	9,626,604	322,731	9,949,335	279,190	8,703,231	965,964	950
2000/01	10,318,657	363,767	10,682,424	324,241	9,481,893	871,125	5,165
2001/02 F	10,682,300	381,270	11,063,570	333,957	9,848,513	876,600	4,500

continued-

TABLE 1
PEARS: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS)

Country	Production	Imports	Supply	Exports	Domestic	Processed	Withdrawals
Mktg. Year 1/			Utilization		Consumption		
TOTAL NORTHERN HEMISPHERE COUNTRIES							
1998/99	11,525,798	1,015,048	12,540,846	923,193	10,508,973	1,075,791	47,889
1999/00	11,831,589	1,094,538	12,926,127	950,833	10,730,602	1,164,559	110,133
2000/01	12,603,784	1,082,472	13,686,256	953,121	11,588,575	1,096,693	71,367
2001/02 F	12,706,400	1,222,270	13,928,670	920,557	11,896,563	1,081,750	49,800
SOUTHERN HEMISPHERE COUNTRIES							
Argentina							
1998/99	582,960	312	583,272	286,397	128,956	167,919	0
1999/00	478,078	809	478,887	279,125	120,227	79,535	0
2000/01	610,110	700	610,810	290,000	137,400	183,410	0
2001/02 F	NA	NA	NA	NA	NA	NA	NA
Australia							
1998/99	162,091	1,240	163,331	14,304	75,000	74,027	0
1999/00	159,500	1,116	160,616	20,562	73,000	67,054	0
2000/01	180,000	1,000	181,000	19,500	78,000	83,500	0
2001/02 F	NA	NA	NA	NA	NA	NA	NA
Chile							
1998/99	258,500	0	258,500	156,400	59,500	42,600	0
1999/00	237,000	25	237,025	124,700	65,325	47,000	0
2000/01	249,000	50	249,050	130,000	68,050	51,000	0
2001/02 F	NA	NA	NA	NA	NA	NA	NA
New Zealand							
1998/99	21,850	300	22,150	6,700	12,500	2,950	0
1999/00	32,555	1,400	33,955	11,386	18,019	4,550	0
2000/01	23,786	1,400	25,186	8,530	12,106	4,550	0
2001/02 F	NA	NA	NA	NA	NA	NA	NA
South Africa; Republic of							
1998/99	280,948	0	280,948	113,872	58,810	108,266	0
1999/00	277,336	0	277,336	96,680	50,640	126,328	3,688
2000/01	310,000	0	310,000	100,000	60,619	148,000	1,381
2001/02 F	NA	NA	NA	NA	NA	NA	NA
TOTAL SOUTHERN HEMISPHERE COUNTRIES							
1998/99	1,306,349	1,852	1,308,201	577,673	334,766	395,762	0
1999/00	1,184,469	3,350	1,187,819	532,453	327,211	324,467	3,688
2000/01	1,372,896	3,150	1,376,046	548,030	356,175	470,460	1,381
2001/02 F	NA	NA	NA	NA	NA	NA	NA
WORLD GRAND TOTAL							
1998/99	12,832,147	1,016,900	13,849,047	1,500,866	10,843,739	1,471,553	47,889
1999/00	13,016,058	1,097,888	14,113,946	1,483,286	11,057,813	1,489,026	113,821
2000/01	13,976,680	1,085,622	15,062,302	1,501,151	11,944,750	1,567,153	72,748
2001/02 F	NA	NA	NA	NA	NA	NA	NA

1/ Data for Northern Hemisphere countries are for a July/June marketing year, except for Mexico and France, which are August/July. In the Southern Hemisphere the marketing year begins on January 1 of the second year indicated, except for Chile where the year starts on February 1 of the second year indicated, and New Zealand where the year starts on October 1 of the first year indicated.

2/ U.S. import/export forecasts are based on trends during recent years and trade contacts.

F= Forecast

TABLE 2: U.S. PEAR EXPORTS
MARKETING YEARS 1996/97-2000/01
(JULY-JUNE)

METRIC TONS

Country of Destination	2000/01		Percentage Change				
	Rank	1996/97	1997/98	1998/99	1999/00	2000/01	1999/00-2000/01
Mexico	1	31,547	48,220	52,321	73,191	85,289	17%
Canada	2	38,959	50,150	41,668	48,066	45,356	-6%
Brazil	3	17,969	17,506	10,381	4,058	7,120	75%
Venezuela	4	1,294	3,439	2,824	5,368	6,004	12%
Taiwan	5	5,066	4,323	4,039	3,595	3,756	5%
Sweden	6	4,306	7,796	4,283	3,040	3,722	23%
Netherlands	7	1,073	9,340	6,466	2,132	2,724	28%
Saudi Arabia	8	2,487	3,494	2,980	2,504	2,259	-10%
United Arab Emirates	9	1,468	1,868	887	1,518	2,196	45%
Colombia	10	2,174	1,506	1,321	2,079	1,109	-47%
Panama	11	775	610	536	1,392	922	-34%
Hong Kong	12	1,573	2,191	1,559	781	889	14%
Costa Rica	13	728	713	549	416	858	106%
Israel	14	1,032	2,529	2,343	328	807	146%
Singapore	15	500	1,186	751	556	695	25%
Guatemala	16	390	514	227	302	587	95%
Turkey	17	0	0	0	0	548	N/A
United Kingdom	18	328	1,271	1,095	423	422	0%
Yemen	19	0	0	0	0	353	N/A
Dominican Republic	20	262	77	257	303	350	16%
Germany	21	785	476	298	391	326	-17%
Bahrain	22	60	192	112	82	214	160%
El Salvador	23	7	33	52	88	194	120%
Russia	24	3,109	4,393	440	165	174	5%
Ireland	25	503	185	160	62	172	176%
Indonesia	26	1,224	292	51	181	128	-30%
Kuwait	27	167	151	198	170	124	-27%
Japan	28	30	200	292	91	92	1%
Egypt	29	0	23	263	38	84	120%
Trinidad and Tobago	30	45	60	84	120		43%
Denmark	31	0	308	102	92	49	-47%
Malaysia	32	273	141	38	0	37	N/A
New Zealand	33	0	50	0	26	35	0.34
Honduras	34	201	93	120	166	29	-82%
Belize	35	0	0	0	0	24	N/A
Other		1,199	1,541	1,585	1,230	255	-79%
Grand Total		119,534	164,871	138,282	152,954	167,903	10%

Source: Bureau of the Census

TABLE 3: U.S. PEAR IMPORTS
MARKETING YEARS 1996/97-2000/01
(JULY-JUNE)
METRIC TONS

Country of Origin	2000/01							Percentage Change
	Rank	1996/97	1997/98	1998/99	1999/00	2000/01	1999/00-2000/01	
Argentina	1	31,230	33,591	38,129	48,619	42,244	-13%	
Chile	2	37,053	23,321	33,552	25,031	25,774	3%	
China	3	0	20	1,147	2,789	6,506	133%	
South Korea	4	726	920	1,586	2,996	5,827	94%	
New Zealand	5	3,862	3,881	4,462	5,282	2,417	-54%	
South Africa	6	3,685	5,020	6,271	4,456	1,499	-66%	
Canada	7	573	771	559	546	400	-27%	
Japan	8	300	303	491	539	352	-35%	
Spain	9	0	0	0	0	75	N/A	
Australia	10	478	0	0	0	0	N/A	
Other		86	37	227	5	0	N/A	
Grand Total		77,993	67,864	86,424	90,263	85,094	-6%	
Source: Bureau of the Census								

The Free Trade Area of the Americas: An Analysis For A Select Basket of Fruits and Vegetables

At the Summit of the Americas in 1994, the heads of state from 34 democratically elected countries in the Western Hemisphere agreed to achieve a Free Trade Area of the Americas (FTAA) by 2005. The FTAA agreement would expand the North American Free Trade Agreement (NAFTA) to embrace a market of over 800 million consumers more than doubling the 412 million consumers in the NAFTA countries. The FTAA would also work in parallel with the World Trade Organization (WTO), which has already provided a relatively stable, predictable, and transparent framework for world trade.

With respect to U.S. exports, the outcome of the FTAA will likely have a modest, albeit not insignificant impact on near to mid-term U.S. exports of Chapter 7 and 8 commodities. However, a successful WTO trade round which results in a significant cut in global tariffs would likely produce greater benefits for the U.S. horticultural sector. While both trade initiatives are critically important to the interests of the U.S. horticultural sector, they offer different opportunities and challenges given the nature of the global supply and demand situation.

It is reasonable to assume that horticultural products with relatively high tariff rates have the most likelihood of being affected by the FTAA and WTO negotiations. It should be noted that for U.S. tariff rates, many countries are assessed a lower tariff rate or are exempt from paying tariffs altogether for a wide range of products. Such countries include those covered under the Caribbean Basin Economic Recovery Act, the Andean Trade Preference Act, or the Generalized System of Preferences.

The following is a trade analysis for a select basket of fruits, nuts, and vegetables from Chapters 7 and 8 of the U.S. Harmonized Tariff Schedule (2001) (shown on page 47). These commodities were selected due to their existing U.S. tariff levels, as they are among the products most likely to be affected in upcoming FTAA and future WTO negotiations and because U.S. Normal Trade Relations (NTR) tariff rates for the majority of Chapter 7 and 8 commodities are already very low, if not zero. The analysis compares the trade of these commodities by region among the NAFTA (Canada and Mexico) trading partners, FTAA countries (excluding Canada and Mexico), and the rest of the world (ROW), which includes all nations but NAFTA and FTAA countries. Through this analysis, we can begin to assess the implications of anticipated tariff reductions under the FTAA for our import and export interests. The time periods for the analysis are calendar years (CY) 1994 to CY 2000.

It should be noted that the average U.S. agricultural tariff rate is 12 percent, compared to the global average agricultural tariff rate of 62 percent.

Total Vegetables

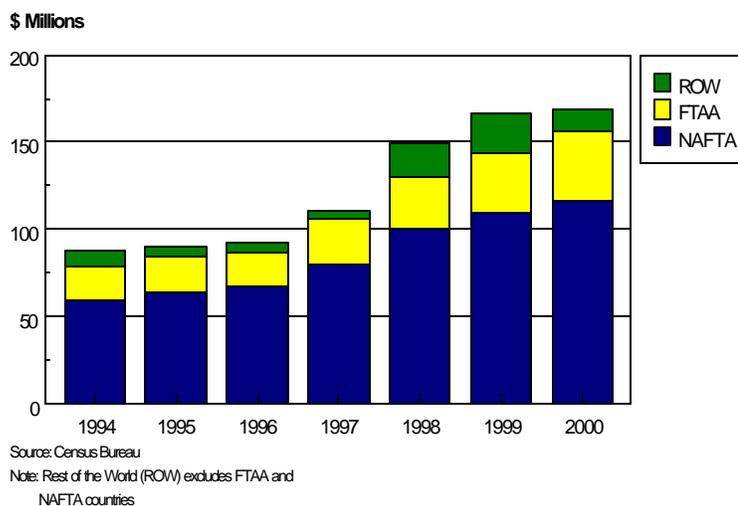
The United States does not rely on vegetable imports from FTAA countries as heavily as it does with NAFTA trading partners. Overall, Mexico and Canada provide the United States with the largest share by value of vegetable imports. In 2000, 60 percent of all vegetable imports originated in Mexico while Canada accounted for 19 percent. Peru accounted for 2 percent, Costa Rica 1.7 percent, and Guatemala 1.4 percent.

Similarly, our NAFTA trading partners are very important for U.S. exports, particularly Canada. In 2000, 55 percent of all U.S. vegetable exports by value were shipped to Canada. This was followed by exports to Japan accounting for 15 percent and Mexico 6.53 percent of the share. The top FTAA market for U.S. vegetable exports is Dominica, accounting for \$12 million and 0.65 percent of all vegetable shipments by value in 2000.

Selected Vegetables

Overall, U.S. imports of the selected basket of vegetables have steadily increased from \$88 million in 1994 to nearly \$169 million in 2000. Most of the increases in value can be attributed to imports from Mexico and Canada. However, imports from both NAFTA and FTAA countries to the U.S. have doubled since 1994. It is expected that the eventual elimination of U.S. tariffs on these items under the FTAA will have a minimal effect on this trend, given the prevalence of U.S. tariff preferences for key suppliers from FTAA countries.

**U.S. Imports of Selected
Vegetables (fresh, dried, & frozen)
CY 1994 - 2000**



The leading U.S. import by value from FTAA countries is asparagus. Total imports of asparagus by the United States have steadily increased by an average of 18 percent per year to reach their highest level of \$34 million in 2000 despite the 21.3 percent ad valorem tariff rate. The majority of U.S. asparagus imports originate in Peru. It should be noted, however, that imports from Peru as well as Colombia are exempt from this tariff under the Andean Trade Preference Act. Imports of Peruvian asparagus have steadily increased by an average of 19 percent per year, accounting for \$30 million in sales, roughly 23,000 tons

to the United States in 2000. Second to Peru is Colombia, shipping \$2.5 million worth, just under 1,000 tons, to the United States in 2000.

Although the United States imports a large amount of asparagus from FTAA countries, very little U.S. asparagus is exported to the region. In fact, the United States shipped less than \$1 million per year of asparagus to FTAA countries between 1994 and 2000. Canada remains the United States primary asparagus market in the Western Hemisphere. In 2000, the United States exported almost 8,000 tons of asparagus worth a total of \$18.7 million to Canada and Mexico. Canada accounted for \$18.2 million of the total. The strongest market for U.S. asparagus outside the Western Hemisphere remains Japan. Last year, Japan imported 7,000 tons of U.S. asparagus worth \$25 million, accounting for 75 percent of all U.S. shipments to the rest of the world (ROW).

Unlike asparagus exports, onion powder remains the strongest U.S. export of the selected commodities to FTAA countries. In 1994, the United States exported 2,000 tons of onion powder worth \$1.8 million to FTAA countries. Exports of onion powder to the region have steadily grown at an average of 11 percent per year to last year's level of \$3.9 million. Although there is no primary market where exports of onion powder are concentrated, Chile, Colombia, Costa Rica, the Dominican Republic, El Salvador, Guatemala, Panama, and Venezuela remain strong markets. It is expected that the eventual elimination of tariffs on these items under the FTAA will not have a major effect on U.S. exports. The industry would most likely stand to gain greater benefits through future WTO negotiations given the potential in key markets outside the western hemisphere.

Total Fruits and Nuts

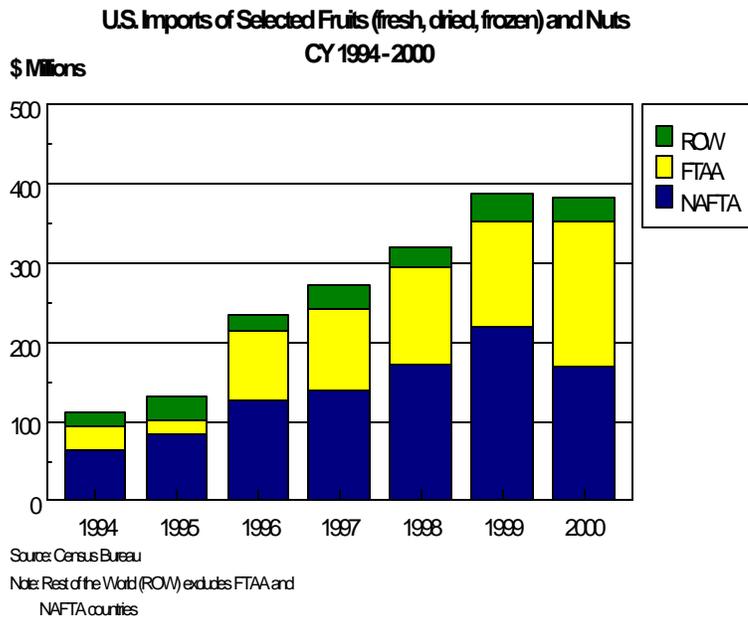
Overall, the United States relies heavily on imports of fruit and nuts from FTAA countries. In fact, nine out of the top ten exporting countries to the United States are FTAA countries. Last year, Mexico supplied 18.5 percent of the total U.S. fruit and nut imports, followed by Chile with 15.9 percent, and Costa Rica with 12.4 percent. The only non-FTAA country in the top ten was India, which accounted for \$242 million and 6.8 percent of all fruit and nut (i.e., cashews) imports by the United States.

U.S. exports show a decidedly different picture. In 2000, the largest share of U.S. fruit and nut exports went to Canada for a total of 31 percent, followed by Japan with a 16-percent market share, but then significantly dropping off with the third ranked market, Mexico, at 6.7 percent. The next largest FTAA market for U.S. exports is Venezuela, ranking twenty-third overall in 2000 at \$22 million and resulting in .56 percent of the total U.S. fruit and nut exports.

Selected Fruits and Nuts

Since 1994, imports of the selected fruits and nuts have increased considerably. U.S. imports of these

items from NAFTA, FTAA, and the rest of the world (ROW) were worth just over \$100 million in 1994. Over the next six years, imports steadily increased to reach \$382 million in 2000. Much of this can be attributed to the NAFTA, which has outpaced imports from both FTAA and the rest of the world (ROW) until last year. In 2000, imports for the first time were led by FTAA countries, accounting for 48 percent all imports by the United States. It is expected that the eventual elimination of U.S. tariffs on these items under the FTAA will have a minimal effect on this trend, given the already existing U.S. tariff preferences for key suppliers from FTAA countries.



The top imports from FTAA countries over this period are cantaloupes and avocados. Cantaloupes, according to the Harmonized Tariff Schedule, imported between September 16th to July 31st, accounted for the largest overall import. Cantaloupe imports by the United States have steadily increased from the 1994 level of \$51 million by an average of 9 percent per year to reach the 2000 level of \$97 million, despite an ad valorem tariff rate of 29.8 percent. Guatemala and Costa Rica accounted for 42 percent (135,702 tons) and 33 percent (128,840 tons) of U.S. imports last year, respectively. However, it should be noted that cantaloupe imports from Guatemala and Costa Rica are exempt from the 29.8 percent tariff under the Caribbean Basin Economic Recovery Act.

The export market for U.S. cantaloupes in FTAA countries is almost nonexistent, with year end values ranging from as low as \$3,442 in 1994 to a high of \$259,000 in 1997. Last year's exports to FTAA countries accounted for \$64,000. The strongest market for U.S. cantaloupe exports is Canada, which accounted for 95 percent of the total \$30 million exported in 2000.

U.S. imports of avocados from FTAA countries have consistently been led by Chile and the Dominican Republic. U.S. avocado imports have steadily increased from the 1994 level of \$24 million by an average of 7 percent per year to reach the 2000 level of \$78 million, at approximately 51,149 tons. Of this \$78 million, imports of Chilean avocados accounted for 90 percent of the total.

U.S. avocado exports overall have steadily decreased from the 1994 level of \$11 million to the 2000 level of \$3.6 million. Japan is the major market followed by Canada. In 2000, the U.S. exported 1,127 tons worth \$1.6 million to Japan and 790 tons worth \$912,000 to Canada. Total exports of avocados to FTAA countries in 2000 accounted for only 12 tons worth \$15,000.

U.S. exports of the selected fruits and nuts show a decidedly different picture. In 1994, the United States exported \$12 million of the selected commodities, but sales have since declined to their lowest level of \$7.8 million in 2000. Exports of almonds have proven to have the strongest value, accounting for 52 percent of the total sales of the selected commodities each year. In 1994, almond exports to FTAA countries totaled \$6.7 million and 1,746 tons, and reached their seven-year high of \$8.6 million, 1,818 tons, in 1997. However, exports of almonds have steadily declined since then to the 2000 level of \$4.7 and 1,567 tons, with Brazil, Argentina, and Venezuela being the top three markets in all years. It is expected that the eventual elimination of tariffs on these items under the FTAA will not have a major effect on U.S. fruit and nut exports. As in the case of vegetables, the industry would most likely stand to gain greater benefits through future WTO negotiations given the potential in key markets outside the western hemisphere

Conclusions

Under existing trade patterns, most U.S. imports of fruits and vegetables originate from Mexico and Canada. NAFTA has clearly contributed to the increasing trade trends. Likewise, a significant number of FTAA countries in this review are exempt from paying U.S. tariffs due to the Caribbean Basin Economic Recovery Act or the Andean Trade Preference Act. This, along with a strong U.S. dollar, the counter-seasonality of products, and strong consumer demand, explain to a large extent why U.S. imports from FTAA countries have steadily increased.

With respect to U.S. exports, the outcome of the FTAA will likely have a modest but not insignificant, impact on near to mid-term U.S. exports of Chapter 7 and 8 commodities. However, a successful WTO trade round which result in a significant cut in global tariffs would likely produce greater benefits for the U.S. horticultural sector. While both trade initiatives are critically important to the interests of the U.S. horticultural sector, they offer differing opportunities and challenges given the nature of the global supply and demand situation.

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World Trade Situation and Policy Updates

Commerce Department Announces and Amends Preliminary Dumping Margins in the Antidumping Case Against Canadian Greenhouse Tomatoes

On October 1, 2001, the Commerce Department's International Trade Administration (ITA) announced its preliminary determination that greenhouse tomatoes from Canada are being, or are likely being sold in the United States at less than fair value. The U.S. International Trade Commission (ITC) had earlier issued a preliminary determination in May that the imports were causing, or threatened to cause, injury to the U.S. industry. The preliminary dumping margins vary depending on the specific exporter/grower. On October 19, 2001, the Department of Commerce's International Trade Administration (ITA) amended its October 1, 2001, preliminary determination that greenhouse tomatoes from Canada are being, or are likely being sold in the United States at less than fair value. The amendment reflected ITA's correction of a significant ministerial error made initially in the dumping margin calculations. In the case of BC Hot House Foods, Inc., the margin was lowered from 50.75 to 33.95 percent. The dumping margins for all other firms that did not provide information to the agency in its preliminary investigation were cut from 32.36 to 24.04 percent. The margins assigned to other companies that provided information remained the same. ITA has indicated it will postpone its final determination until no later than February 19, 2002. Although certain of the initial dumping margins have been reduced, U.S. industry contacts still view these margins as significant. During CY 2000, imports of greenhouse tomatoes into the United States from Canada totaled 48,457 tons valued at \$78 million. Greenhouse tomatoes now account for approximately 50 percent of the total volume of Canadian tomatoes shipped into the United States.

Commerce Department Announces Final Determinations in Antidumping Duty Investigation of Honey from Argentina and China and Countervailing Duty Investigation on Honey from Argentina

On September 27, the DOC announced its final determinations in the antidumping and countervailing duty investigations of honey from Argentina and the People's Republic of China (PRC). It was found that imports of honey from Argentina and the People's Republic of China are being sold in the United States at less than fair value and that exporters/producers of honey from Argentina have received countervailable subsidies from the Government of Argentina. These investigations were initiated by the American Honey Producers Association and the Sioux Honey Association on October 26, 2000. The DOC set antidumping duties (AD) against Argentine shippers ranging from 32.56 percent to 60.67 percent. The DOC set an additional 4.53 percent countervailing duty (CVD) rate against Argentine honey. With regard to China, antidumping duties were set between 25.88 percent to 183.8 percent. According to U.S. import data, the unit value of Argentine honey fell from approximately \$1,525 per ton in 1997 to \$952 per ton in 2000. Similarly, unit values of Chinese honey fell from \$1,613/ton to \$1,264/ton during the same time period.

Commerce Department Institutes Five-year "Sunset" Review on the Suspended Antidumping

Investigation on Fresh Tomatoes from Mexico

On October 1, 2001, the DOC announced that it is initiating a five-year “sunset” review of the suspended antidumping investigation (Tomato Suspension Agreement), to determine whether termination of the suspended investigation on fresh tomatoes from Mexico would be likely to lead to continuation or recurrence of material injury. The U.S. International Trade Commission (ITC) published a concurrent notice of Institution of a Five-year Review covering this same suspended investigation. Domestic interested parties wishing to participate in this Sunset Review were requested to respond no later than October 16, 2001. The original agreement, signed on November 1, 1996, by the DOC and Mexican tomato growers suspended the DOC’s antidumping investigation on exports of tomatoes into the United States from Mexico. The agreement eliminated the need to implement the preliminary dumping duties, provided that Mexican tomato growers do not sell below the specified reference prices.

Commerce Department Will Not Extend Scope of Antidumping Duties on Non-Frozen Chinese Concentrated Apple Juice

On Tuesday, October 2, 2001, the DOC announced that it would not extend antidumping duties to certain non-frozen apple juice concentrate from the People’s Republic of China. The ruling came after the U.S. apple industry requested in April to expand the established antidumping duty order on Chinese non-frozen apple juice concentrate to include semi-frozen apple juice concentrate. On May 15, 2000, the U.S. International Trade Commission (ITC) issued a final determination that the U.S. apple juice industry has been materially injured by imports of non-frozen concentrated apple juice from China. On the basis of the October 1, 2001, scope ruling, the Commerce Department determined that the “semi-frozen” product, which is shipped and stored at -18 degrees Celsius, is considered “frozen” for classification purposes, and thus does not fall within the scope of the antidumping order on non-frozen apple juice concentrate.

Japan Proposes a Safety Net on Domestic Vegetables

On September 25, 2001, Japan submitted a proposal on the implementation of special safeguards for perishable products to the WTO Special Session of the Committee on Agriculture. The proposal is for a new safeguard mechanism for seasonal and perishable agricultural products to provide for “timely and effective” safeguard measures to protect domestic growers from rapidly growing imports from neighboring countries. *Details of how the proposal would work are as follows:* 1) The new safeguard mechanism would be applied automatically based on a pre-set trigger level for quantity and/or price of imports. It would not require an investigation and determination by the authorities on the increased volume of imports or injury to a domestic industry. The additional duties would be automatically imposed (details not provided); 2) The proposed safeguard mechanism would cover all unprocessed agricultural products, including frozen products intended for preservation, as

well as slightly processed products such as cut products. Dried products would not be covered by this

safeguard.

Philippine Ban on Chinese Fruits and Nuts Could Bring New Market Opportunities for U.S. Exporters

On October 11, 2001, the Philippine Department of Agriculture ordered a ban on most fruit and nuts imports from China, including apples, pears, apricots, peaches, plums, quinces, cherries, almonds, and walnuts. The ban was imposed in response to the interception of codling moths (*Cydia pomonella*) in a shipment of Chinese apples last week. This development could potentially bring new opportunities for U.S. fruit and nuts sales to the Philippines, at least until such time China is able to address related Philippine concerns and overturn the ban. Apples account for the bulk of the Philippines' fruit and nut imports from China. In calendar year (CY) 2000, China's apple exports to the Philippines totaled nearly 56,000 metric tons, valued at \$16 million. This compares with shipments of 11,000 tons of U.S. apples, valued at \$5 million in the same year. Normally, large volumes of apples are imported into the Philippines starting in November for the Christmas holiday season.

Binational Panel Announces Decision on Mexico/U.S. High Fructose Corn Syrup (HFCS) Antidumping Duties

On October 10, 2001, the NAFTA Binational Panel issued a final decision indicating that Government of Mexico did not sufficiently establish evidence of damage to the domestic sugar industry due to imports of U.S. HFCS. The Binational Panel agreed with earlier WTO and NAFTA decisions. Consequently, the Government of Mexico has 90 days to decide whether to: 1) concede that damage to the industry has not been proved, withdraw the antidumping duties on imported HFCS and refund past antidumping duties which have already been collected; or 2) proceed to re-evaluate the evidence/justification according to the specifications of this NAFTA panel to determine if there has been substantial damage to the domestic sugar industry.

Organic Updates

Danish Government Tests Reveal GMOs in Organic Feeds

Since January 1, 2001, the Danish Plant Directorate under the Ministry of Food, Agriculture and Fisheries has been testing organic feed for GMOs. The results of the most recent test of organic feed was published August 1, 2001. Almost half of the samples revealed GMO content. The Danish authorities interpret the EU organic feed regulations as not allowing GMO. Danish organic feed is required to be entirely organic. Previous regulations allowed up to 25 percent conventional feed. To emphasize the seriousness of this offense, the Danish Minister of Food, Agriculture and Fisheries fined two firms.

Organic feed sampled from eight Danish feed companies revealed traces of GMO's in 20 samples out of a total of 48, and in 7 samples, in quantities of more than 1 percent. The representative for the Organic Service Center stated that it is unavoidable that GMO's would be found in organic soybeans, since they are transported in the same ships which transport conventional beans. The Minister, Ritt Bjerregaard, says it is unacceptable that any GMO's would be in organic feed. She said it is proven that some feed companies are able to provide 100 percent organic feed.

As most organic feed ingredients are imported, the Minister has written to her European colleagues to encourage them to intensify their controls. The Netherlands allows up to 1 percent of GMO's in their organic feed and although Sweden has a zero tolerance level, they do not randomly test organic feeds for GMO's.

The Minister wants to change legislation in order to be able to publish the names of the companies in violation--forcing them to be more cautious and eager to secure GMO free organic feed. Feed producers, on the other hand, have stopped selling organic feed at fixed prices until a threshold is accepted.

As a follow-up to a previous sample, the Ministry is now planning another series of random samples for food containing soybeans and corn products. The survey from February to July, 2000 disclosed that one third of all products contained more than one percent GMO and none of these were labeled, as required. Ten percent of all products tested had a GMO content above 3 percent. Labeling of approved GMO's is mandatory if the GMO content is above 1 percent. The results of this new survey will be published before January 1, 2002.

For more news on organics, see HTP's newsletter "Organic Perspectives," available at the HTP home page: www.fas.usda.gov/http/organics/organics.html.

Top United States Horticultural Product Exports By Value

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity	FY 1996	FY 1997	FY 1998	FY 1999	FY 2000	Oct. - Aug.	Oct. - Aug.
						FY 2000	FY 2001
--- 1,000 Dollars ---							
Almonds	942,620	879,032	772,891	696,818	586,751	504,813	602,112
Wine & Wine Prdts.	305,546	390,376	510,923	545,287	549,559	502,286	509,259
Frz. Potato Fries	256,289	294,417	313,209	343,216	339,475	312,766	334,244
Fresh Apples	371,773	412,855	328,068	375,869	334,217	310,109	393,795
Fresh Grapes	304,322	313,836	274,953	283,865	328,221	256,169	315,915
Orange Juice All	274,362	305,172	295,564	307,165	290,244	270,104	235,175
Oranges	277,184	308,055	339,114	159,585	267,145	257,337	296,536
Potato Chips	166,188	145,468	226,987	257,355	243,014	224,109	169,152
Grapefruit	258,903	240,408	189,744	221,443	207,723	205,942	198,569
Fresh Lettuce	132,866	146,640	173,746	157,262	179,926	166,177	187,319
Beer	377,324	341,784	280,088	211,861	176,642	162,552	176,412
Fresh Cherries	130,790	140,650	113,556	154,793	169,150	168,276	160,204
Walnuts	195,802	195,209	153,863	154,449	149,907	138,036	166,668
Fresh Tomatoes	100,467	123,789	122,345	127,153	148,248	132,658	141,961
Raisins	200,596	204,388	199,733	198,817	146,820	130,535	136,371
Proc. Sweet Corn	137,011	167,490	139,068	148,050	145,380	136,333	114,070
Prunes	139,090	138,398	133,732	133,885	133,027	121,303	139,929
Fresh Broccoli	84,215	92,693	90,778	100,603	126,610	116,106	96,281
Strawberries	91,738	97,020	93,349	102,464	118,905	107,581	101,087
Peaches	71,935	92,883	74,512	95,130	101,613	87,272	101,860
Total Other	5,220,264	5,593,378	5,492,927	5,524,114	5,794,621	5,338,441	5,646,944
GRAND TOTAL	10,039,285	10,623,941	10,319,150	10,299,184	10,537,198	9,648,905	10,223,863

Top United States Horticultural Product Exports By Volume

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity 1/	FY 1996	FY 1997	FY 1998	FY 1999	FY 2000	Oct. - Aug.	Oct. - Aug.
						FY 2000	FY 2001
Fresh Broccoli	129,168	130,999	126,791	154,514	182,863	168,585	144,189
Fresh Apples	565,910	690,595	539,685	664,969	568,158	526,761	710,781
Orange Juice All	442,080	565,332	553,175	554,951	551,087	520,027	434,603
Oranges	497,077	569,739	609,433	247,419	487,706	469,211	527,142
Frz. Potato Fries	350,638	396,738	438,425	468,826	469,185	431,711	469,290
Grapefruit	497,401	484,417	387,216	428,784	389,564	386,726	387,678
Fresh Lettuce	286,256	294,571	303,816	312,563	328,311	306,895	327,702
Wine & Wine Prdts.	170,332	208,786	266,294	274,696	286,251	262,242	290,146
Beer	614,202	536,362	425,523	330,158	277,230	255,730	262,885
Fresh Grapes	240,704	236,400	214,569	221,158	269,999	199,326	237,234
Almonds	301,970	187,953	202,968	200,847	222,299	193,688	224,019
Proc. Sweet Corn	168,644	203,613	171,294	186,153	186,184	175,449	143,486
Fresh Tomatoes	131,308	153,657	133,687	148,271	181,810	161,864	158,903
Pears	144,493	126,603	156,807	145,816	162,592	143,284	143,409
Peaches	74,841	103,442	80,023	97,974	111,017	95,722	109,953
Lemons	132,177	120,330	113,392	113,931	105,990	101,999	107,373
Potato Chips	59,930	53,614	103,025	104,366	103,616	96,303	67,652
Raisins	118,942	115,215	120,741	104,225	84,054	73,818	98,800
Prunes	62,548	67,530	70,864	68,412	66,958	60,880	77,096
Walnuts	83,287	81,118	63,800	67,354	66,132	61,127	68,084

1/ Wine and beer is reported in 1,000 liters, orange juice in 1,000 single strength liters, and all other groups in 1,000 kilograms.

Source: U.S. Department of Commerce, Bureau of the Census.

Top United States Horticultural Product Imports By Value

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity 1/	FY 1996	FY 1997	FY 1998	FY 1999	FY 2000	Oct. - Aug.	Oct. - Aug.
						FY 2000	FY 2001
--- 1,000 Dollars ---							
Wine & Wine Prdts.	1,360,163	1,629,254	1,829,709	2,148,127	2,271,772	2,095,807	2,110,206
Beer	1,302,759	1,443,326	1,677,002	1,865,087	2,126,042	1,954,128	2,120,037
Bananas & Plantns	1,156,330	1,194,458	1,188,442	1,180,474	1,098,402	1,017,398	1,031,852
Nursery Products	538,109	565,267	632,672	673,281	745,826	683,217	724,748
Cut Flowers	573,399	572,926	630,067	578,847	623,184	587,328	542,176
Fresh Tomatoes	679,977	611,612	735,180	713,029	608,514	575,510	722,545
Fresh Grapes	344,799	386,183	440,659	545,770	518,260	517,394	579,833
Cashews	300,206	292,315	339,490	389,300	488,470	447,929	335,318
Fresh Peppers	199,403	251,908	343,606	324,863	451,811	429,885	484,702
Frz. Potato Fries	103,699	156,831	216,576	252,437	321,905	296,026	306,093
Essential Oils	317,821	322,447	350,086	317,481	310,513	287,898	278,745
All Apple Juices	327,267	354,632	228,735	210,586	278,865	252,511	213,931
Fresh Melons	198,811	226,502	250,921	277,917	259,788	259,553	285,476
All Orange Juices	223,809	240,072	211,353	285,927	243,386	228,816	167,200
Pineapple: Presrvd	199,358	208,941	187,116	245,529	201,027	183,493	146,804
Olives	182,024	184,217	181,730	199,926	185,239	170,768	186,710
Fresh Cucumbers	115,608	100,823	154,634	138,231	168,696	161,186	192,953
Fresh Mangos	100,039	123,009	125,047	139,041	142,005	137,901	141,896
Fresh Onions	146,632	127,447	151,990	135,587	131,707	125,448	159,770
Total Other	3,721,871	4,088,077	4,501,501	5,241,397	5,250,565	4,855,932	5,064,435
GRAND TOTAL	12,092,084	13,080,247	14,376,516	15,862,837	16,425,977	15,268,128	15,795,430

1/ Nursery Products excludes cut flowers.

United States Top Horticultural Product Imports By Volume

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity 1/ 2/	FY 1996	FY 1997	FY 1998	FY 1999	FY 2000	Oct. - Aug.	Oct. - Aug.
						FY 2000	FY 2001
Wine & Wine Prdts.	336,294	432,192	428,664	419,843	481,362	443,250	472,633
Beer	1,446,244	1,612,379	1,869,577	2,072,387	2,290,531	2,105,988	2,302,670
Bananas & Plantns	3,973,927	3,911,294	4,135,832	4,373,166	4,350,816	4,025,980	3,719,400
Nursery Products	2,040,035	2,206,085	2,460,306	2,765,380	2,860,717	2,534,218	2,570,413
Cut Flowers	2,807,090	2,770,092	2,770,186	2,708,264	2,804,814	2,644,229	2,474,343
Fresh Tomatoes	724,621	743,205	856,852	722,519	708,742	678,207	834,259
Fresh Grapes	341,098	351,567	419,956	387,165	452,182	449,481	417,165
Cashews	61,037	62,669	74,373	69,549	86,244	78,276	75,528
Fresh Peppers	269,558	284,221	319,671	345,425	352,149	324,992	320,150
Frz. Potato Fries	170,308	269,794	353,931	397,455	470,586	432,201	470,322
Essential Oils	33,394	43,609	90,334	45,219	65,379	63,011	36,434
All Apple Juices	856,697	1,084,986	1,016,823	1,139,079	1,169,591	1,062,356	1,128,849
Fresh Melons	661,426	779,005	860,437	873,052	899,000	898,410	877,740
All Orange Juices	836,648	1,116,798	1,063,239	1,326,139	1,284,975	1,193,422	872,972
Pineapple: Presrvd	309,742	295,858	255,051	330,773	329,198	300,241	252,033
Olives	72,287	81,511	92,958	96,959	93,906	86,131	107,145
Fresh Cucumbers	295,907	302,306	327,745	336,026	346,767	333,823	362,953
Fresh Mangos	166,058	191,115	188,767	213,195	231,075	225,766	216,144
Fresh Onions	266,779	261,088	259,188	246,548	224,069	212,208	251,715

1/ Wine and beer is reported in 1,000 liters, orange juice in 1,000 single strength liters, and all other groups in 1,000 kilograms.

2/ Nursery Products excludes cut flowers.

Source: U.S. Department of Commerce, Bureau of the Census.

Selected Horticultural Crop Prices Received By U.S. Growers

Commodity	Domestic Units	2000		2001		% Change Last Month	% Change Last Year
		Sep	Aug	Sep 1/	Aug		
Dollars/unit							
Grapefruit 2/	Box	6.14	3.69	6.89		86.7%	12.2%
Lemons 2/	Box	9.77	22.62	19.02		-15.9%	94.7%
Limes 2/	Box	0	0	0		n/a	n/a
Oranges 2/	Box	0.32	5.57	6.53		17.2%	1940.6%
Tangelos 2/	Box	0	0	0		n/a	n/a
Tangerines 2/	Box	0	0	0		n/a	n/a
Temples 2/	Box	0	0	0		n/a	n/a
Apples, fresh 3/	Lb.	0.233	0.169	0.187		10.7%	-19.7%
Grapes	Lb.	520	560	630		12.5%	21.2%
Peaches	Ton	0.365	0.24	0.292		21.7%	-20.0%
Pears, fresh 3/	Ton	332	533	463		-13.1%	39.5%
Strawberries, fresh	Lb.	0.622	0.874	0.776		-11.2%	24.8%
Asparagus 4/	Cwt.	0	145	248		71.0%	n/a
Broccoli 4/	Cwt.	27.7	27.1	24.4		-10.0%	-11.9%
Cantaloupes	Cwt.	19.1	17.4	12.5		-28.2%	-34.6%
Carrots 4/	Cwt.	14	19.6	16.2		-17.3%	15.7%
Cauliflower 4/	Cwt.	25.4	24.7	19.7		-20.2%	-22.4%
Celery 4/	Cwt.	15.1	10.3	10.4		1.0%	-31.1%
Sweet Corn 4/	Cwt.	20.1	18.6	18.5		-0.5%	-8.0%
Cucumbers 4/	Cwt.	23.1	23.9	24.3		1.7%	5.2%
Lettuce 4/	Cwt.	29.4	26.9	33.3		23.8%	13.3%
Onions 4/	Cwt.	10.7	14.8	13.7		-7.4%	28.0%
Snap Beans 4/	Cwt.	56.1	61.5	61.8		0.5%	10.2%
Tomatoes 4/	Cwt.	29.6	28.2	21.8		-22.7%	-26.4%

1/ Preliminary.

2/ Equivalent on-tree returns.

3/ Equivalent packinghouse-door returns for CA and NY (apples only), OR (pears only), and WA (apples, peaches, and pears). Prices as sold for other states.

4/ Fresh-market, FOB shipping point.

Weight per box of citrus.

Grapefruit : AZ, CA = 67 Lbs., Florida = 85 Lbs., and Texas = 80 Lbs. per box.

Lemons: AZ, CA = 76 Lbs. per box.

Limes: Florida = 88 Lbs. per box.

Oranges: AZ, CA = 75 Lbs., Florida = 90 Lbs., and Texas = 85 Lbs. per box.

Tangelos and Temples: Florida 90 Lbs. per box.

Note: Zeroes indicate insufficient information or insufficient sales to establish a price.

Source: National Agricultural Statistics Service (NASS), USDA.