

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

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(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

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(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		1996/97	1997/98	1998/99	1999/00	2000/01	Percentage Change
	Rank							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