

## Strawberry Situation and Outlook in Selected Countries

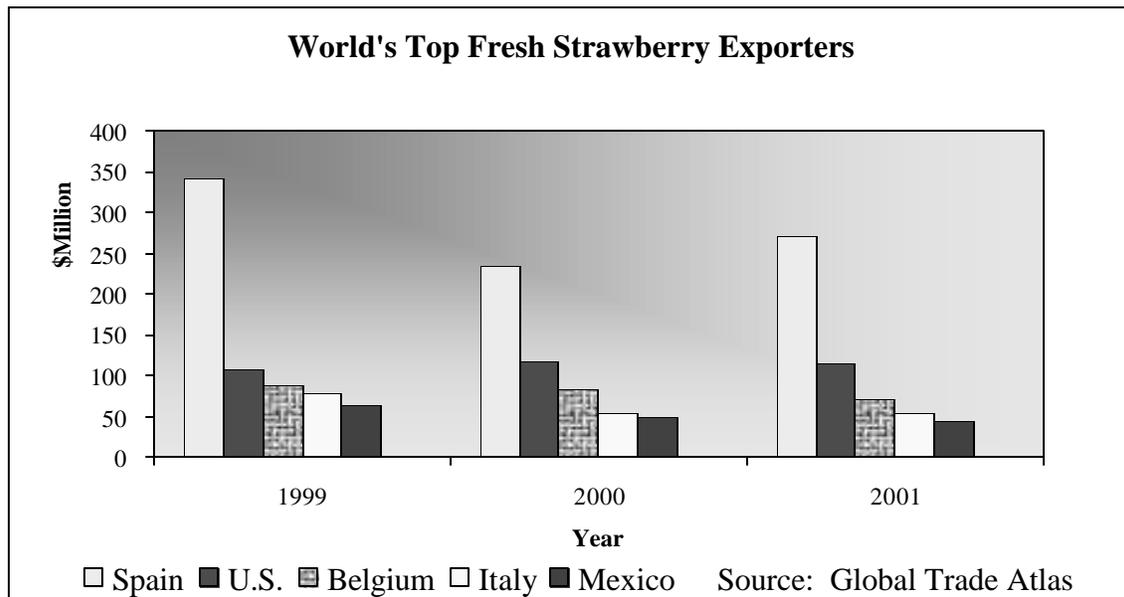
**Fresh strawberry production in major strawberry-producing countries is forecast to decline by 2 percent in Marketing Year (MY) 2002. The United States, Spain, and Mexico estimate strawberry production to increase from 1 to 2 percent for the next marketing year. Italy, Japan, and Poland forecast a decline in production for MY 2003 due in large part to less acreage planted.**

### Spain–Fresh Strawberries

Spain is the top fresh strawberry exporter in the world in terms of value. In calendar year (CY) 2001, Spain exported more than \$272 million of fresh strawberries. Between 1999 and 2001, its total exports averaged nearly \$283 million. Spain's largest export markets were Germany, France, the U.K., Belgium-Luxembourg and Italy. Collectively, these 5 markets comprised of 84 percent of the country's international fresh strawberry shipments.

In 2002, Spain's strawberry production fell 9 percent from the previous year to 301,000 tons. A reduction in planted area was the primary cause for the decline. Production in 2003 is expected to rebound from this year, increasing to 310,000 tons.

Spain's imports of fresh strawberries are minimal. Its large strawberry supplies and transportation issues make market conditions unfavorable for U.S. exports.



## **United States**

Estimates for the 2002 crop are up 1 percent compared to a year ago to 764,000 tons. The strawberry forecast for 2003 will be available in April on our strawberry commodity page which is located at the following address:

<http://www.fas.usda.gov/horticulture/strawberry.html>

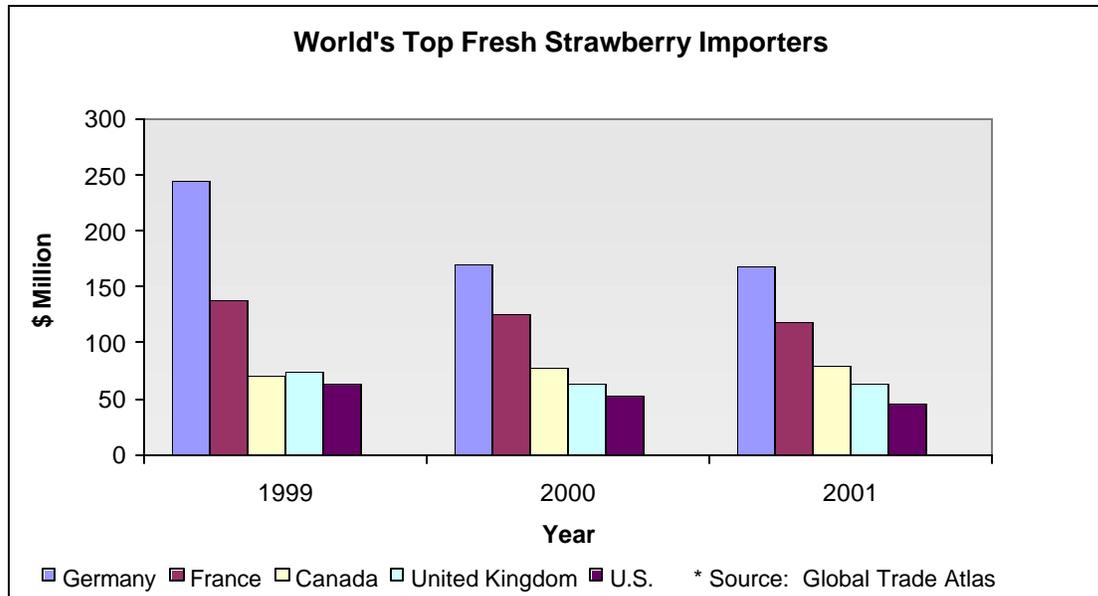
The United States is a large exporter of fresh strawberries, second only to Spain. In CY 2001, the United States exported more than \$114 million dollars of fresh strawberries. Between 1999 and 2001, its total exports averaged over \$113 million. The United States top five export markets were Canada, Japan, Mexico, France, and the United Kingdom. Collectively, these five countries imported 99 percent of the United States' fresh strawberry exports.

In CY 2001, the United States was the fifth largest importer of fresh strawberries, bringing in more than \$45 million from foreign suppliers. Its largest foreign source of fresh strawberries was Mexico, which supplied 95 percent of all imports. New Zealand, Australia, Belgium and Canada rounded out the top five strawberry exporters to the United States

## **International Marketing Activities**

For the 2002-03 marketing year, the California Strawberry Commission (CSC) is carrying out MAP activities for fresh strawberries in Mexico, Hong Kong, and Canada, and fresh and frozen strawberries in Japan. Research is also being carried out for California Strawberries for the first time in both China and Brazil. CSC's main goal overseas is to broaden trade and consumer use of California strawberries by differentiation of the California strawberry. The main messages for consumers are origin, safety, health attributes, and new uses, while the focus for the trade is on improving care and handling practices as well as communicating the advantages of California strawberries versus the competition's product.

The CSC has succeeded in Japan in particular, establishing a new image for the California Strawberry in Japan by differentiating its less sweet and firmer characteristics. Japanese consumers are now using the California berry in everything from salads to breakfast to non-traditional desserts. Retailers, intrigued with the Commission's new approach, are incorporating into demonstrations these practical but innovative ways to use California strawberries into their sales activities with great success. For the year 2002 retail sales in Japan from March to July increased by 1,000 percent.



### Italy–Fresh Strawberries

Italy was the fourth largest fresh strawberry exporter in the world in CY 2001. During this period, Italy exported more than \$54 million of fresh strawberries. Between 1999 and 2001, its fresh strawberry exports averaged over \$62 million. Italy’s top five export markets were Germany, Switzerland, Austria, Denmark, and the United Kingdom. Collectively, these five countries purchased 91 percent of Italy’s fresh strawberry exports.

Italy’s strawberry crop continues to decline, due to high labor costs and international competition. In 2002, Italy’s strawberry production totaled 99,700 tons, a decrease of nearly 2 percent from the previous year. In 2003, strawberry production is forecast to continue the downward trend, falling to 97,000 tons.

Fresh strawberry imports rose to 24,000 tons from 22,750 in CY 2001. Imports are expected to continue to increase as the fresh strawberry crop declines. In CY 2003, imports are forecast at 26,000 tons.

### Mexico–Fresh Strawberries

In CY 2001, Mexico was the fourth largest fresh strawberry exporter in the world. During this period, Mexico exported more than \$44 million of fresh strawberries, with the United States as its top market. Mexico shipped over \$43 million to the United States in CY 2001, comprising 97 percent of its total exports during this period. Between 1999 and 2001, its fresh strawberry exports averaged over \$53 million. Rounding out its top five export markets were Japan, Italy, France, and Canada.

Mexico’s current economic woes could affect the acreage planted in the future as continued problems with low prices and lack of available credit drive up costs of production. In MY 2001, which began in August, Mexico’s fresh strawberry production

totaled 130,000 tons, an increase of nearly 5 percent from the previous year. In MY 2002, fresh strawberry production is forecast to rise marginally to 131,000 tons.

Imports of fresh strawberries remain steady as production remained at current levels. In MY 2001, imports were at 10,700 tons compared to 10,627 tons the previous year. In MY 2002, imports are forecast at 10,900 tons.

### **Poland-Fresh Strawberries**

Approximately 40 percent of Poland's strawberry crop is utilized for fresh strawberry production. The remaining crop is used primarily for the production of frozen or processed strawberries. In CY 2002, total production is estimated at 162,000 tons, a 33-percent decrease from the previous year. Unfavorable weather and a decline in planting area were the primary causes for the decrease. No new plantings are expected for the upcoming year. Thus, the production forecast for CY 2003 will remain close to current levels at 160,000 tons.

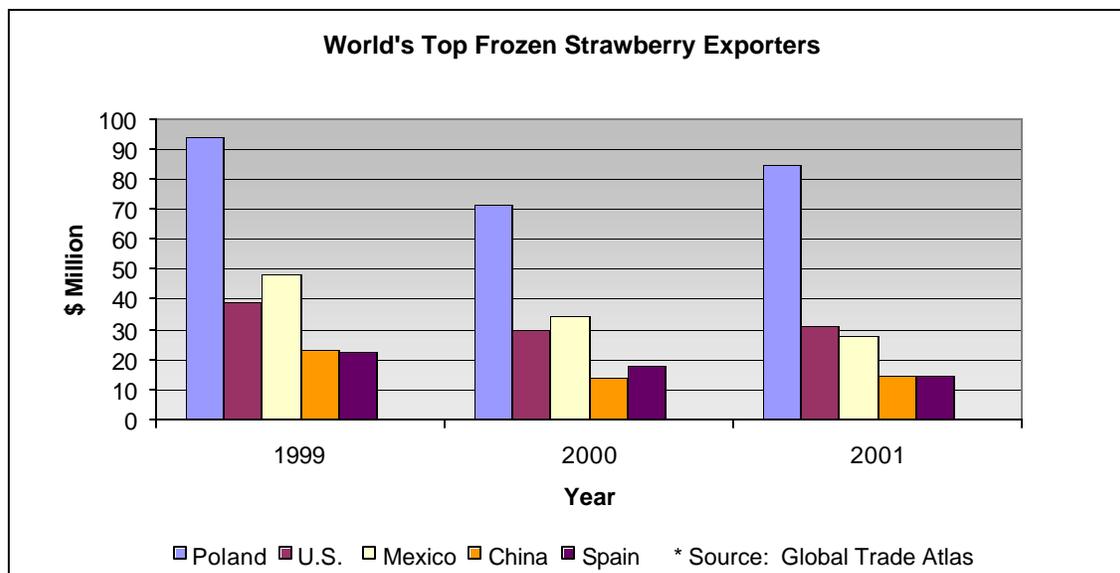
Exports in CY 2002 fell as a result of the smaller crop. In CY 2001, fresh strawberry exports decreased to 15,300 tons from 20,900. Exports are forecast near current levels at 15,000 tons for MY 2002. Imports are relatively small, totaling 1,400 tons in CY 2002. No change is expected for MY 2002.

### **Japan-Fresh Strawberries**

Japan consumes nearly all of its strawberry production. Imports make up the shortfall in consumer demand. In MY 2001, which begins in October production totaled 208,600 tons, an approximate 2-percent increase from MY 2000. Production in MY 2002 is forecast at 205,000 tons.

Japan did not export any strawberries in MY 2000 and MY 2001. This trend is expected to continue in MY 2002.

Imports of fresh strawberries are relatively modest. In MY 2001, imports totaled 4,765 tons, a dropped of nearly 16 percent, due to the increase in the strawberry crop. Imports in MY 2002 are forecast to increase slightly to 5,000 tons.



### Poland-Frozen Strawberries

On the average, 60 percent of Poland's strawberry crop is utilized for frozen strawberry production. The remaining crop is used for fresh strawberry operations. Poland exported over \$84 million in CY 2001, making it the top frozen strawberry exporter in the world. Between 1999 and 2001, Poland exported an average of \$83 million worth of frozen strawberries. Poland's top export markets were Germany, the Netherlands, France, Denmark and the United Kingdom. Collectively, these five markets comprised of 73 percent of the Poland's international frozen strawberry shipments.

Poland's imports of frozen strawberries CY 2002 were relatively small. In CY 2002, imports were estimated to reach 1000 tons, 50 percent higher than the previous year. Imports for CY 2003, are expected to remain the same as CY 2002

### China-Frozen Strawberries

In CY 2001, China exported more than \$14 million of frozen strawberries making it the fourth largest exporter in the world. Between 1999 and 2001, China averaged \$17 million in frozen strawberry exports. China's largest export markets were Japan, the Netherlands, Australia, Germany, and the United Kingdom. These top five countries combined to make up 80 percent of China's frozen strawberries export markets in CY 2001.

Although China's Ministry of Agriculture does not regularly issue public reports, local published sources estimate that the country's annual production is over 120,000 tons on an approximate acreage of 20,000 to 30,000 hectares. Until the 1990s, strawberry production was limited. The popularity of the fruit has increased as the utilization of plastic covered tunnel greenhouses allowed for the year-round production of the fruit, particularly during the winter months. Aside from a flexible growing period, start-up

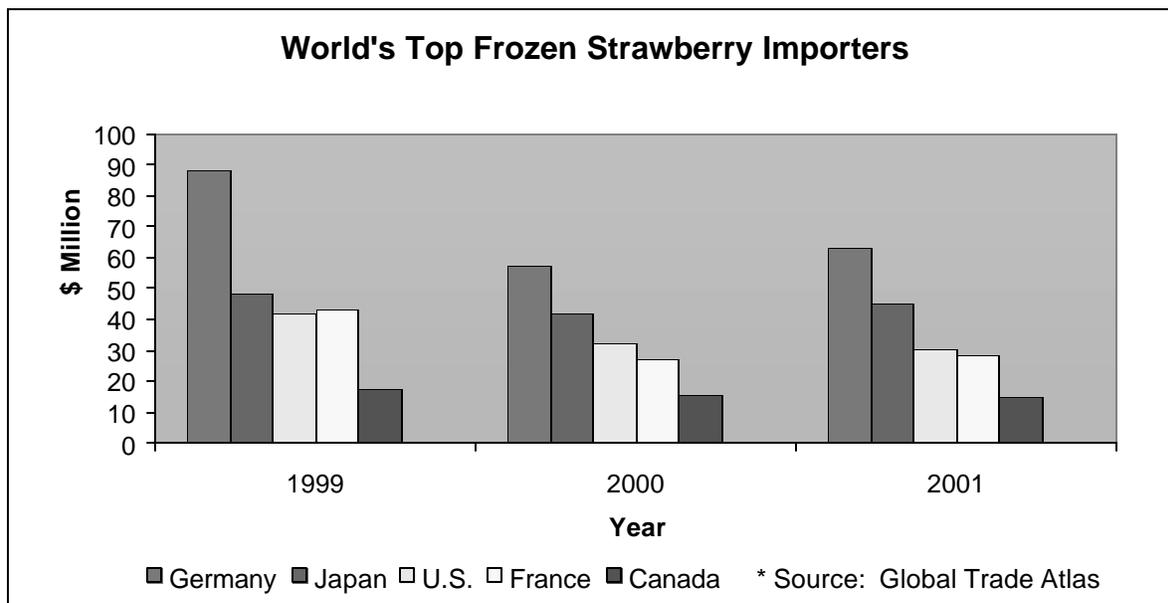
investment is low relative to other fruits and the return on investment is relatively quick. A majority of the strawberries in China are harvested between early March and early June. Imports of frozen strawberries are minimal. China's Customs Statistics estimate CY 2001 imports at \$817,000. <sup>1</sup>

### United States-Frozen Strawberries

The United States is a leading frozen strawberry exporter in the world, second only to Poland. In CY 2001, the United States exported more than \$31 million of frozen strawberries. Between 1999 and 2001, its total frozen strawberry exports averaged over \$33 million. Japan, Canada, Australia, South Korea and France were the largest frozen export markets in CY 2001. Collectively, these five markets comprised 98 percent of its frozen strawberry exports.

On the average, twenty-five percent of the U.S. strawberry crop is used for frozen and/or processing production.

In 2001, the United States was the third largest importer of frozen strawberries bringing in more than \$30 million from foreign sources. The United States five largest frozen strawberry suppliers were Mexico, Canada, Ecuador, Guatemala, and China. Between 1999 and 2001, U.S. frozen strawberry imports averaged \$34 million.



<sup>1</sup> Foreign Agricultural Service Gain Report #CH2616, China's Strawberry Situation 2002.

### **Mexico-Frozen Strawberries**

Mexico is the third largest frozen strawberry exporter in the world, behind Poland and the United States. In CY 2001, Mexico exported more than \$31 million of frozen strawberries. Between 1999 and 2001, its total frozen strawberry exports averaged over \$36 million. The United States, Japan, Canada, Australia, and Austria were its largest export markets. Collectively, these five markets comprised 99 percent of its international frozen strawberry sales.

Mexico's current economic woes could affect the acreage planted in the future as continuing problems with low prices and lack of available credit drive up costs of production. In MY 2001, which began in August, Mexico's frozen strawberry production totaled 130,000 tons, an increase of nearly 5 percent from the previous year. In MY 2002, frozen strawberry production is forecast at 131,000 tons.

Imports of frozen strawberries are quite small with exports reaching only 265 tons in MY 2001. A slight increase is expected in MY 2002.

### **Spain-Frozen Strawberries**

Spain is the fifth largest frozen strawberry exporter in the world. In CY 2001, Spain exported more than \$14 million of frozen strawberries. Between 1999 and 2001, its total frozen strawberry exports averaged over \$18 million. The Netherlands, Germany, France, Italy and Belgium-Luxembourg were the top frozen export markets in CY 2001. Collectively, these five markets comprised 72 percent of its international frozen strawberry shipments.

On the average, 15 percent of Spain's strawberry crop is used for the frozen and/or processed production.

In CY 2001, Spain's imports of frozen strawberries totaled an estimated \$4.3 million. Between 1999 and 2001, Spain's frozen strawberry imports averaged about \$4.5 million. Morocco, France, Germany, Belgium-Luxembourg and the Netherlands were Spain's five largest suppliers.

### **Japan-Frozen Strawberries**

Japan did not export any strawberries in MY 2000 and MY 2001. This trend is expected to continue in MY 2002. On the average, 1 percent of Japan's strawberry crop is used for the frozen and/or processing production.

In CY 2001, Japan imported more than \$45 million of frozen strawberries. Approximately 48 percent of the frozen strawberry supplies came from the United States, its largest supplier. China, South Korea, Mexico, and Chile were the top frozen strawberry suppliers to Japan.

## **Italy-Frozen Strawberries**

Italy is among the top fifteen frozen strawberry exporters in the world. In CY 2001, it exported more than \$2.1 million of frozen strawberries. Between 1999 and 2001, its frozen strawberry exports averaged over \$2.8 million. France, Switzerland, the United Kingdom, Germany, and Austria were the top frozen export markets in CY 2001. Collectively, these five markets comprised 95 percent of Italy's frozen strawberry exports.

On the average, 10 percent of Italy's strawberry crop is used for the frozen and/or processing production.

In CY 2001, Italy's imports of frozen strawberries totaled an estimated \$7.1 million. Between 1999 and 2001, Spain's frozen strawberry imports averaged about \$8.1 million. France, Turkey, Spain, Germany, and Poland were Italy's five largest suppliers.

*(The FAS Attaché Report search engine contains reports on Fresh Strawberry industries for 6 countries, including Spain, Italy, and Mexico. For information on production and trade, contact Rey Santella at 202 720-6877 or visit the strawberry commodity page at <http://www.fas.usda.gov/htp/horticulture/strawberry.html> For information on marketing contact Elizabeth Mello at 202-690-6057).*