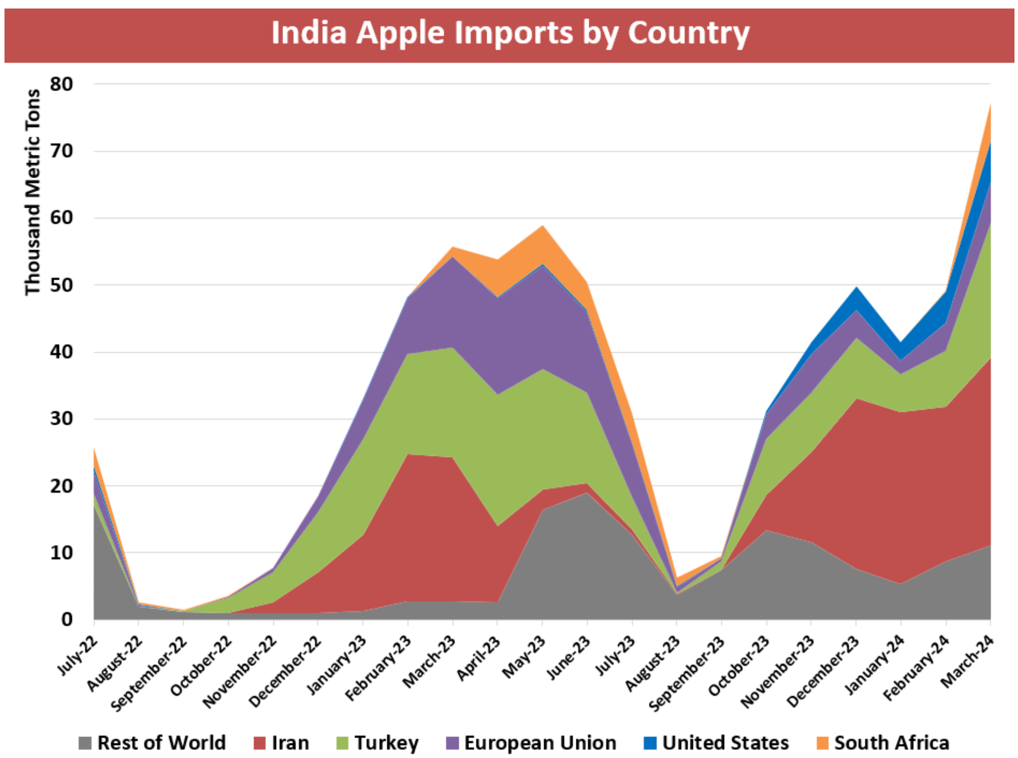
United States Department of Agriculture Foreign Agricultural Service

June 2024

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

India Apple Imports Forecast at a Record High

India fresh apple imports rose over 70 percent in the first 9 months of marketing year (MY) 2023/24 (July 2023 – June 2024) compared to the same period last year and are forecast to reach a record 510,000 metric tons (tons). Apple consumption in India continues to rise as the population grows and demands healthier foods. Domestic production is estimated to increase slightly, but demand for higher-priced imported apples continues to grow as there is limited infrastructure to move lower-quality domestic apples from the north of the country to other regions of India.



Source: Trade Data Monitor, LLC.

Imports from Iran have nearly doubled so far in MY 2023/24, accounting for much of the overall increase in India apple imports. Prior to MY 2019/20, Iran consistently accounted for less than 10 percent of imports but has risen to over a third of all imports. India put in place a minimum import price for apples in May 2023 to counter downward pressure on domestic prices from low-cost Iranian apples entering India through Afghanistan to avoid tariffs. For more information on the minimum import price, read the [Fresh Deciduous Fruit Annual Report - 2023] from FAS Post in New Delhi, India. However, Iran apples still provide an affordable option in a price-sensitive market as evidenced by the continued growth in market share. The Iranian government placed an export duty on apples in March 2024 due to low domestic supplies and high prices, which may slow shipments in coming months.

Approved by the World Agricultural Outlook Board/USDA

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Imports from the United States have also grown, rising from 2,000 tons last marketing year to nearly 20,000 in the first 9 months of the current marketing year. This increase follows India lifting a retaliatory tariff on U.S. apples in September 2023 that had been in place since June 2019. Despite a rebound in U.S. apple production, India apple imports from the United States this year are likely to remain well below the 10-year average in an increasingly competitive market. Imports of U.S. apples are predominantly red delicious and average $1.03/kg, compared with $0.62/kg for Iranian apples.

Other top importers include the European Union, Turkey, and South Africa. There have been only slight increases in EU and Turkey apple shipments to India this year on lower production and increased shipping costs and delays due to the Red Sea attacks. Although just beginning to ship apples for MY 2023/24, South Africa has already seen rising quantities of apples destined for India helped by higher production and a bilateral agreement for in-transit cold treatment of apples.

FRESH APPLES

World apple production for MY 2023/24 is forecast to rise more than 700,000 tons to 83.7 million as increases for the United States and China more than offset losses for the European Union and Turkey. Exports are projected up 10 percent to 6.0 million tons on higher shipments from the United States and Iran.

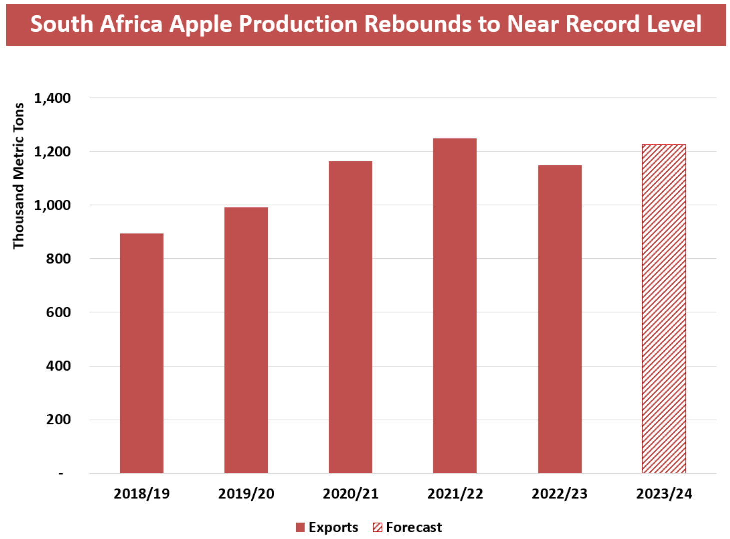
China production is estimated to grow 500,000 tons to 45.0 million despite declining area planted as growers increase yields in existing orchards. Exports are estimated up nearly 100,000 tons to 870,000 on higher shipments to Vietnam, Philippines, Bangladesh, and Nepal. Imports are forecast down 10,000 tons to 85,000 on lower shipments from Southern Hemisphere suppliers.

EU production is estimated to contract 475,000 tons to 12.2 million on cold temperatures and poor pollination across major producing countries. Exports are expected to decline by 65,000 tons to 970,000 on lower production and weaker demand from top market Egypt due to a foreign currency shortage. Imports are forecast up more than 15 percent to 265,000 tons as higher shipments from North Macedonia, Moldova, and Serbia supplement domestic consumption.

U.S. production is estimated up 636,000 tons to 5.0 million, the highest level in 6 years. Good weather in Washington, the top producing state, led to increased yields and rebounding production volumes up 25 percent year-over-year. Combined with continued high production in Michigan, this more than offset a smaller crop in New York. USDA's National Agricultural Statistics Service (NASS) surveyed industry and updated U.S. production in the May 2024 *Noncitrus Fruits and Nuts 2023 Summary* report. Exports are projected to rise 274,000 tons to 885,000 on higher production with increased shipments to Mexico, Taiwan, and India. Imports are projected to rise slightly to 105,000 tons on steady demand.

Chile production is forecast to contract slightly to 870,000 tons due to a continued decline in area planted as growers transition to more profitable crops. Exports are projected to fall slightly to 463,000 tons, the lowest level since MY 1999/2000.

South Africa production is forecast to rise 75,000 tons to 1.2 million on favorable weather and an increase in area harvested. This marks a rebound from last year's hail-damaged crop and nearly matches the record crop in MY 2021/22. Exports are expected to grow by 43,000 tons to 650,000 on higher shipments to India and the European Union. If realized, South Africa will remain the largest Southern Hemisphere apple exporter for the third consecutive year.



New Zealand production is projected up 40,000 tons to 483,000 due to favorable weather conditions as growers partially recover from Cyclone Gabrielle which damaged orchards in February 2023. Production remains below pre-cyclone levels as the high costs and lag times associated with replanting orchards means that area planted is unlikely to recover in the short-term. Exports are expected to rise 21,000 tons to 330,000 as production recovers.

FRESH TABLE GRAPES

World table grape production for MY 2023/24 is forecast up more than 150,000 tons to 28.1 million for a fifth straight year of growth as good growing conditions in India and China more than offset weather-related losses in the European Union, Turkey, and the United States. Exports are expected to fall by 200,000 tons to 3.5 million on reductions in Peru, the United States, and Turkey.

China production is estimated to rise 750,000 tons to 13.5 million, another record high after 5 consecutive years of growth. Exports are forecast up more than 25 percent to 490,000 tons, making China the second biggest exporter of table grapes behind Peru. Imports are projected down by over 40,000 tons to 135,000 due to ample domestic supplies.

EU production is projected to drop nearly 250,000 tons to 1.3 million on weather-related losses in Italy. Exports are forecast down 46,000 tons to 125,000 on lower exportable supplies. Imports are estimated up 27,000 tons to 600,000 on strong shipments from South Africa.

U.S. production is estimated to decline 19 percent to 655,000 tons, the smallest harvest in over 30 years. Hurricane Hilary made landfall during peak harvest season in California with wind and rain that negatively impacted the quantity and quality of table grapes that remained to be harvested. NASS surveyed industry and updated U.S. production in the May 2024 *Noncitrus Fruits and Nuts 2023 Summary* report. Exports fell by 65,000 tons to 182,000 reflecting lower supplies. Imports rose to 793,000 tons with higher shipments from Chile and Mexico to balance lower production.

Peru production is forecast to increase slightly to 776,000 tons as El Niño conditions limited potential growth. Exports are projected down nearly 100,000 tons to 525,000 on lower exportable supplies as heavy rains and high temperatures negatively affected fruit quality. Peru remains the top exporter despite this contraction.

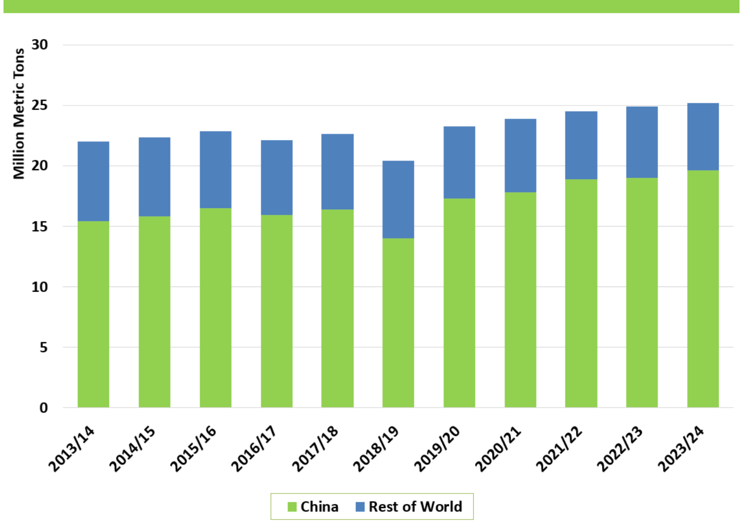
Chile production is expected to decline 20,000 tons to 635,000 due to reductions in area planted that continue a decade long decline in production volumes. Exports are expected to fall 16,000 tons to 480,000 on lower production, despite higher shipments to the United States. If realized, Chile will drop from the first to the third largest exporter in just two years.

South Africa production is projected to rise 52,000 tons to 370,000 on favorable winter weather conditions, rebounding close to the record level of production in MY 2021/22. Exports are forecast to grow nearly 20 percent to 340,000 on greater exportable supplies.

FRESH PEARS

World pear production for MY 2023/24 is projected up more than 275,000 tons to 25.2 million as greater supplies in China more than offset losses from weather-damaged crops in the European Union. Exports are forecast up more than 100,000 tons to 1.8 million as higher shipments from China and South Africa are partially offset by lower shipments from the European Union and Turkey.

China Pear Production Drives Global Growth



China production is expected to rise 600,000 tons to 19.6 million as normal weather conditions permit a recovery from last year's frost-damaged crop. Investment in new irrigation and fertilizer technologies as well as new varieties have more than offset the decline in area planted, leading to higher volumes and improved quality. Exports are projected up nearly 40 percent to 565,000 tons on higher exportable supplies and strong shipments to top Asia markets and Russia. China remains the top exporter of pears accounting for nearly a third of global exports.

EU production is estimated down 250,000 tons to 1.8 million as losses in Italy led to the smallest crop in 18 years. Exports are forecast down 48,000 tons to 300,000 on lower exportable supplies. Imports are projected up nearly the same amount to 180,000 tons to satisfy demand.

U.S. production is estimated up 15,000 tons to 602,000 on higher yields despite continued declines in acreage. NASS surveyed industry and updated U.S. production in the May 2024 *Noncitrus Fruits and Nuts 2023 Summary* report. Exports are projected up 15 percent to 115,000 tons with greater shipments to Mexico and Canada. Imports are expected to rise slightly to 75,000 tons as increased shipments from China balance reductions from Argentina and South Korea.

Argentina production is forecast down 33,000 tons to 621,000 due to poor growing conditions and higher production costs. Exports are forecast up slightly to 320,000 tons making Argentina the largest Southern Hemisphere exporter of pears and the second largest globally.

Chile production is expected to fall by 10,000 tons to 202,000 marking the third consecutive year of decline. Exports are projected down 5,000 tons to 100,000, the lowest level in over 30 years.

South Africa production is forecast up 30,000 tons to 530,000 due to optimal winter conditions with adequate rain and chill hours. Exports are expected to rise by 40,000 tons to 280,000 on greater exportable supplies and strong shipments to the European Union.

Future Releases and Contact Information

For additional information, please contact Stephanie Galbraith at stephanie.galbraith@usda.gov

The next release of this circular is scheduled for December 12, 2024. To receive the circular via email, go to https://public.govdelivery.com/accounts/USDAFAS/subscriber/new. Please visit https://www.fas.usda.gov/data/fresh-apples-grapes-and-pears-world-markets-and-trade to view archived reports.

The *Fresh Apples, Grapes, and Pears: World Markets and Trade* circular is based on reports from FAS Overseas Posts and on available secondary information. The individual country reports can be obtained on FAS Online at: https://gain.fas.usda.gov/Pages/Default.aspx.

PSD Online

The entire USDA PSD database is available online at: https://www.fas.usda.gov/psdonline

Additional Resources

For additional data and analysis, please refer to the USDA-FAS website: https://www.fas.usda.gov/data/commodities/fresh-fruit

NOTES TO USERS:

European Union definition: includes 27 countries in the customs union (Austria, Belgium/Luxembourg, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, and Sweden).

HS Codes:

The following codes at the 6-digit level are used for compiling trade data:

- Apples – 080810
- Pears – 080830
- Table grapes - 080610

Marketing Years:

- **Apples -** The United States and Mexico are on an August-July marketing year. All other Northern Hemisphere countries are on a July-June marketing year. Southern Hemisphere countries are on a calendar year indicated as the second year of the split year.

- **Table Grapes -** The United States and Mexico are on a May-April marketing year. All other Northern Hemisphere countries are on a June-May marketing year. Southern Hemisphere producer countries of Argentina, Australia, Chile, Peru, and South Africa are on an October-September marketing year; Brazil remains on a calendar year basis indicated as the second year of the split year.

- **Pears -** Northern Hemisphere countries are on a July-June marketing year. Southern Hemisphere countries are on a calendar year indicated as the second year of the split year.

Apples, Fresh: Production, Supply and Distribution in Selected Countries

(1,000 Metric Tons)

	2019/20	2020/21	2021/22	2022/23	Dec 2023/24	Jun 2023/24
Production						
China	42,425	44,066	45,973	44,500	45,000	45,000
European Union	11,480	11,935	12,266	12,683	12,208	12,208
United States	4,852	4,511	4,438	4,394	4,356	5,030
Turkey	3,620	4,300	4,493	4,968	4,850	4,850
India	2,370	2,300	2,300	2,400	2,410	2,410
Iran	2,241	2,241	2,241	2,241	2,241	2,241
Russia	1,779	1,540	1,641	1,742	1,844	1,844
Brazil	983	1,297	1,297	1,297	1,297	1,297
Ukraine	1,115	1,279	1,279	1,279	1,279	1,279
South Africa	991	1,164	1,250	1,150	1,230	1,225
Other	6,810	6,620	6,321	6,376	6,394	6,354
Total	78,665	81,253	83,500	83,031	83,109	83,739
Domestic Consumption						
China	41,487	43,033	45,051	43,821	44,235	44,215
European Union	10,659	11,175	11,448	11,887	11,363	11,513
Turkey	3,412	4,013	4,096	4,572	4,471	4,536
United States	4,098	3,844	3,822	3,883	3,646	4,250
India	2,250	2,400	2,577	2,550	2,639	2,764
Russia	2,455	2,259	2,216	2,094	2,129	2,099
Brazil	1,028	1,250	1,392	1,415	1,417	1,432
Iran	1,423	1,286	1,334	1,695	1,511	1,386
Ukraine	1,114	1,273	1,231	1,247	1,254	1,244
Mexico	1,017	973	899	1,042	1,061	1,131
Other	9,189	9,177	9,208	8,614	8,924	8,816
Total	78,133	80,684	83,276	82,820	82,649	83,386
Imports						
India	194	377	448	360	410	510
Iraq	405	406	455	341	425	415
United Kingdom	320	330	328	278	315	325
Mexico	257	260	266	232	250	320
Vietnam	233	278	299	302	305	320
European Union	378	325	331	238	250	275
Russia	763	796	587	362	295	265
United Arab Emirates	171	175	211	190	200	240
Saudi Arabia	195	174	179	199	205	220
Bangladesh	271	266	252	178	205	185
Other	3,239	2,989	3,145	2,715	2,909	2,726
Total	6,425	6,375	6,502	5,397	5,769	5,801
Exports						
European Union	1,199	1,084	1,149	1,035	1,095	970
United States	861	775	721	611	820	885
China	1,042	1,102	997	774	845	870
Iran	818	956	907	546	730	855
South Africa	509	589	625	607	650	650
Chile	660	644	603	469	480	463
New Zealand	400	356	341	309	320	330
Turkey	209	288	398	396	380	315
Serbia	206	185	165	110	170	160
Moldova	217	150	253	123	140	110
Other	476	506	428	470	463	410
Total	6,596	6,634	6,587	5,451	6,093	6,018

Note: The United States and Mexico are on an August-July marketing year. All other Northern Hemisphere countries are on a July-June marketing year. Southern Hemisphere countries are on a calendar year indicated as the second year of the split year.

Grapes, Fresh Table: Production, Supply and Distribution in Selected Countries

(1,000 Metric Tons)

	2019/20	2020/21	2021/22	2022/23	Dec 2023/24	Jun 2023/24
Production						
China	10,800	11,450	11,980	12,750	13,500	13,500
India	2,280	2,300	2,900	2,850	2,950	2,950
Turkey	2,050	2,220	1,857	2,220	1,900	1,900
Brazil	1,436	1,748	1,748	1,748	1,748	1,748
Uzbekistan	1,607	1,695	1,695	1,695	1,695	1,695
Egypt	1,385	1,170	1,470	1,560	1,568	1,568
European Union	1,548	1,374	1,422	1,546	1,298	1,298
Peru	645	685	713	766	776	776
United States	905	871	826	811	878	655
Chile	785	665	793	656	745	635
Other	1,302	1,293	1,308	1,319	1,331	1,362
Total	24,743	25,471	26,713	27,921	28,389	28,087
Fresh Dom. Consumption						
China	10,677	11,215	11,810	12,537	13,150	13,145
India	1,803	1,830	2,285	2,254	2,360	2,320
European Union	1,872	1,766	1,854	1,948	1,778	1,773
Turkey	1,845	2,006	1,595	1,997	1,722	1,761
Brazil	1,394	1,677	1,703	1,683	1,705	1,705
Uzbekistan	1,487	1,566	1,471	1,455	1,595	1,585
Egypt	1,248	1,027	1,328	1,392	1,400	1,400
United States	1,252	1,227	1,281	1,310	1,428	1,265
Russia	308	369	405	549	328	318
Mexico	273	272	266	304	276	291
Other	2,159	2,212	2,216	2,095	2,196	2,171
Total	24,318	25,166	26,215	27,523	27,938	27,735
Imports						
United States	672	670	713	746	760	793
European Union	501	572	604	574	630	600
Russia	288	351	380	518	300	290
United Kingdom	275	269	271	258	280	270
Canada	189	191	184	178	175	170
Vietnam	113	147	99	140	150	140
China	239	194	181	176	130	135
Mexico	91	98	103	130	120	135
Thailand	131	140	103	136	145	135
Hong Kong	238	201	119	116	120	120
Other	683	743	835	705	729	723
Total	3,418	3,577	3,592	3,676	3,539	3,511
Exports						
Peru	400	468	540	622	595	525
China	362	428	351	389	480	490
Chile	605	526	608	496	565	480
South Africa	284	322	336	285	310	340
India	185	267	275	283	295	335
Mexico	224	207	196	209	230	230
United States	325	314	258	247	210	182
Egypt	150	155	150	170	170	170
Australia	153	121	109	131	140	155
Turkey	205	215	264	227	180	140
Other	647	648	654	690	500	501
Total	3,540	3,669	3,741	3,749	3,675	3,549

Note: The United States and Mexico are on a May-April marketing year. All other Northern Hemisphere countries are on a June-May marketing year. Southern Hemisphere producer countries of Argentina, Australia, Chile, Peru, and South Africa are on an October-September marketing year, and Brazil is on a calendar year indicated as the second year of the split year. Some countries may include raisin-type and/or table-type grapes.

Pears, Fresh: Production, Supply and Distribution in Selected Countries

(1,000 Metric Tons)

	2019/20	2020/21	2021/22	2022/23	Dec 2023/24	Jun 2023/24
Production						
China	17,314	17,815	18,876	19,000	19,600	19,600
European Union	2,059	2,373	1,847	2,081	1,832	1,832
Argentina	640	615	557	654	625	621
United States	653	610	601	587	583	602
Turkey	530	550	530	571	540	540
South Africa	438	461	540	500	500	530
India	310	308	310	300	313	313
Russia	290	247	240	235	230	230
Japan	198	206	206	206	206	206
Chile	222	233	223	212	202	202
Other	586	487	564	576	554	525
Total	23,241	23,906	24,493	24,922	25,186	25,201
Domestic Consumption						
China	16,707	17,345	18,404	18,607	19,120	19,050
European Union	1,823	2,172	1,684	1,873	1,677	1,717
United States	594	577	559	558	553	562
Turkey	479	477	436	482	465	485
Russia	436	446	422	455	389	415
India	327	330	338	328	347	342
Argentina	300	301	283	339	306	301
South Africa	212	214	253	260	220	250
Japan	197	205	205	205	205	205
Indonesia	236	196	215	151	185	190
Other	1,754	1,531	1,629	1,649	1,622	1,614
Total	23,067	23,793	24,429	24,906	25,090	25,132
Imports						
Indonesia	236	196	215	151	185	190
European Union	172	175	186	140	170	185
Russia	194	241	183	220	160	185
Brazil	138	121	133	159	160	150
Vietnam	133	97	101	96	110	125
United Kingdom	100	105	103	112	100	100
Hong Kong	76	81	77	80	80	90
Mexico	84	73	72	80	80	85
Belarus	119	112	78	108	105	75
United States	72	75	69	71	80	75
Other	509	473	503	481	479	487
Total	1,832	1,749	1,719	1,696	1,709	1,747
Exports						
China	619	480	482	410	500	565
Argentina	340	315	275	315	320	320
European Union	407	377	349	348	325	300
South Africa	227	247	287	241	280	280
United States	130	109	110	100	110	115
Chile	114	127	116	105	105	100
Turkey	51	73	94	89	75	55
Belarus	16	54	27	56	45	40
Korea, South	31	19	24	30	25	20
Australia	9	9	8	6	8	8
Other	15	11	11	15	12	14
Total	1,959	1,821	1,784	1,713	1,805	1,817

Note: Northern Hemisphere countries are on a July-June marketing year. Southern Hemisphere countries are on a calendar year indicated as the second year of the split year.