



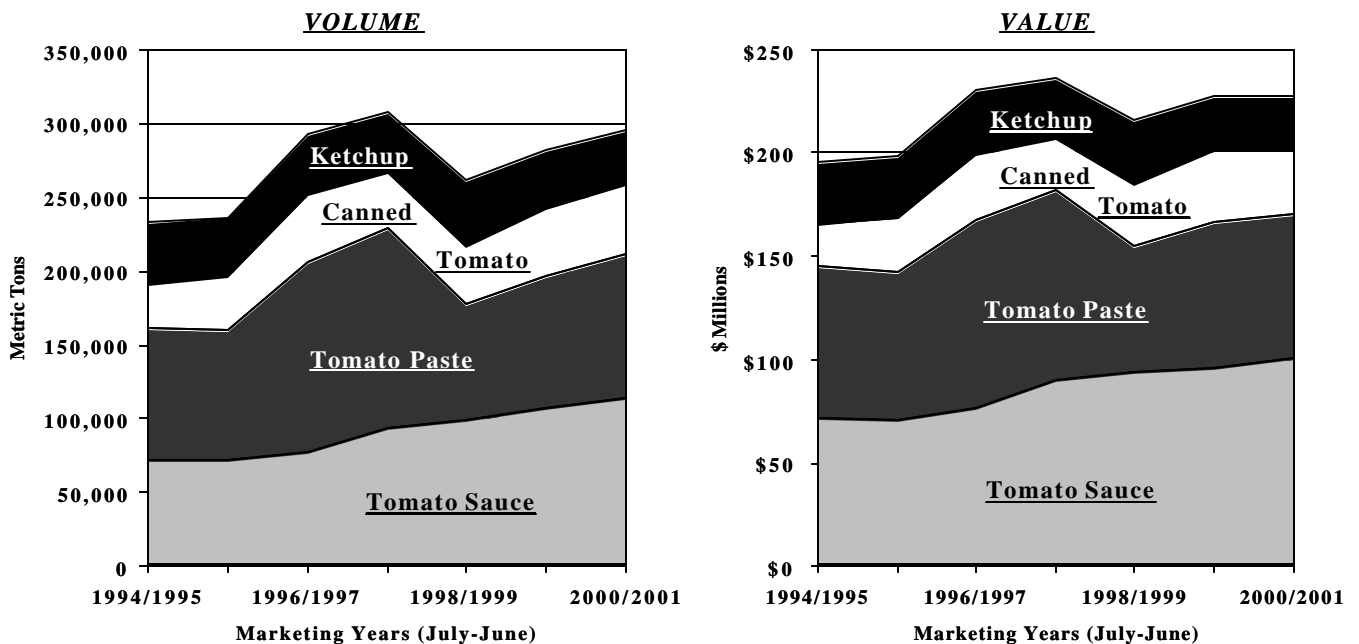
United States  
Department of  
Agriculture

Foreign  
Agricultural  
Service

Circular Series  
FHORT 07-02  
July 2002

# World Horticultural Trade and U.S. Export Opportunities

## Shipments of U.S. Processed Tomato Products Increased Slightly in MY 2001 Export Value Practically Unchanged



Source: U.S. Bureau of the Census

Combined U.S. exports of processed tomato products in marketing year (MY) 2000/01 (July-June) increased 5 percent to nearly 295,000 tons. However, at just over \$225 million, the export value remained practically unchanged from last season. Continued abundant world supplies of processed tomato products put downward pressure on U.S. export prices, mainly for tomato paste and canned tomatoes. The United States is the world's largest producer of processing tomatoes, accounting for almost half the global output. The bulk of U.S. tomatoes for processing are for the production of tomato paste. The United States also plays a key role on world trade of processed tomato products, shipping to more than a hundred countries annually. In MY 2000/01, U.S. shipments of tomato sauce, for example, reached a record 112,000 tons, valued at \$100 million, also a record. U.S. shipments of tomato paste, canned tomatoes, and ketchup were value at \$70 million, \$31 million, and \$26 million in MY 2000/01, respectively. Canada continues to be the top U.S. customer for processed tomato products, accounting for over a half of U.S. global volume and value shipments. Other important export markets include Mexico, Japan, South Korea, and the United Kingdom.

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

**For further information, contact:**

U.S. Department of Agriculture - Foreign Agricultural Service  
Horticultural and Tropical Products Division  
1400 Independence Ave., S.W. Stop 1049  
Washington, DC 20250-1049  
Telephone: 202-720-6590  
Fax: 202-720-3799  
<http://www.fas.usda.gov/htp>

**Frank Tarrant, Director**  
**Scott Bleggi, Deputy Director for Marketing**  
**Brian Grunenfelder, Deputy Director for Analysis**

| <u>ANALYSIS</u>              |              |  |
|------------------------------|--------------|--|
| Nancy Hirschhorn             | 202-720-2974 | Situation & outlook supervisor, publication editor, export forecast coordinator, briefing paper coordinator, key development coordinator, tropical products  |
| Erik Hansen                  | 202-720-0875 | Tree nuts, processed vegetables (excl. potatoes), EU trade policy, circular team & homepage coordinator  |
| Bob Knapp                    | 202-720-4620 | Canned deciduous fruit, sugar  |
| Edwin Lewis                  | 202-720-5028 | Stone fruit, nursery products, avocados, potatoes, NAFTA quarterly report, circular web team   |
| Emanuel McNeil               | 202-720-2083 | Fresh vegetables (excl. potatoes), cut flowers   |
| Heather Page Velthuis        | 202-720-9792 | Wine, brandy, table grapes, grape juice  |
| Debra A. Pumphrey            | 202-720-8899 | Fresh and processed citrus, coffee, trade questions on tea, cocoa, essential oils & spices, & information technology coordinator   |
| Rey Santella                 | 202-720-0897 | Dried fruit, berries, beer/hops, melons, circular web team   |
| Sam Rosa                     | 202-720-6086 | Fresh deciduous fruit, trade issues database coordinator, apple juice, olives, mushrooms   |
| Martin Patterson             | 202-720-7304 | Policy issues coordinator for subsidies & tariff issues, tariff rate quotas & licensing, trade agreements, multilateral policy issues, biotechnology issues, SPS/food safety/quality issues coordinator, bilateral technical & policy issues |
| <u>MARKETING</u>             |              |  |
| Steve Shnitzler              | 202-720-8495 | Apricots, avocados, ginseng, pomegranates, Bartlett pears, kiwi  |
| Vacant                       | 202-720-8498 | Potatoes (marketing), apples, hops, sweet cherries, QSP  |
| Sonia Jimenez                | 202-720-0898 | Citrus, winter pears, peaches, plums, nectarines, Section 108  |
| Kristin Kezar                | 202-690-0556 | Tart cherries, canned fruit, papaya, melons, raisins, kiwifruit (analysis & marketing)   |
| Elizabeth Mello              | 202-720-9903 | Vegetables, berries, Cochran/EMO programs, Produce Marketing Association (PMA), Chocolate Manufacturers Association  |
| Ingrid Mohn                  | 202-720-5330 | Tree nuts, prunes (dried plums)  |
| Elias Orozco                 | 202-720-6791 | Honey (analysis & marketing), website updates  |
| Yvette Wedderburn Bomersheim | 202-720-0911 | Wine, brandy, grape juice, table grapes, Export credit programs  |

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## **Export Summary**

### **April**

U.S. exports of horticultural products to all countries in April totaled \$913 million, an increase of 1.4 percent from April 2001. The categories with significant increases in April were fruit and vegetable juices (up 22 percent to \$80 million), tree nuts (up 11 percent to \$77 million), essential oils (up 11 percent to \$65 million), and wine and beer (up 3.2 percent to \$66 million). The categories with the most significant decreases were fresh fruit (down 4.5 percent to \$149 million) and fresh vegetables (down 4.5 percent to \$113 million).

April 2002 exports to Canada were up almost 5 percent from April 2001 to \$304 million, while exports to the EU rose 8 percent to \$181 million, sales to Mexico climbed 19 percent to \$78 million and sales to Korea rose 21 percent from April 2001 to almost \$40 million. Exports to Japan fell 1 percent to \$141 million, while exports dropped dramatically to Hong Kong (down 17 percent to \$22 million), Taiwan (down 44 percent to \$14 million), and China (down 38 percent to \$10 million) from April 2001.

Exports for the fiscal year (FY) 2002 period were up less than 1 percent from the same period in FY 2001 to \$6.5 billion. Tree nut exports were up about 9 percent to \$809 million for the October-April 2001/02 period, while essential oils exports were up 11 percent to \$413 million, and fruit and vegetable juices rose about 5 percent to \$426 million. All other categories declined. Exports to Canada rose 4 percent to \$1.9 billion for the October-April period, while exports to the EU rose almost 2 percent to \$125 million. Exports to Japan, Hong Kong, and Taiwan dropped 8 percent, 13 percent, and 31 percent, respectively compared with the same period in FY 2001. The fastest growing markets for FY 2002 to date include: India, up 32 percent, Korea, up almost 20 percent, the Dominican Republic, up 16 percent, the United Arab Emirates, up 10 percent, and China, up almost 7 percent.

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To access FAS Attaché Reports online, please reference the following Internet address:

<http://www.fas.usda.gov/scriptsw/attacherep/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. Search by keyword, including country and commodity.

**Visit the HTP Homepage?**

The Horticultural & Tropical Products (HTP) Division Homepage is updated weekly to bring the latest information to the public as efficiently as possible. The site will contain information on policy and technical developments affecting trade in horticultural commodities, as well as selected reports submitted by FAS overseas offices and special reports prepared by the division. The information will typically remain on the site for approximately one month, before being archived. For further information on this site, please contact Nancy Hirschhorn (202) 720-2974. Go to <http://www.fas.usda.gov/htp>.

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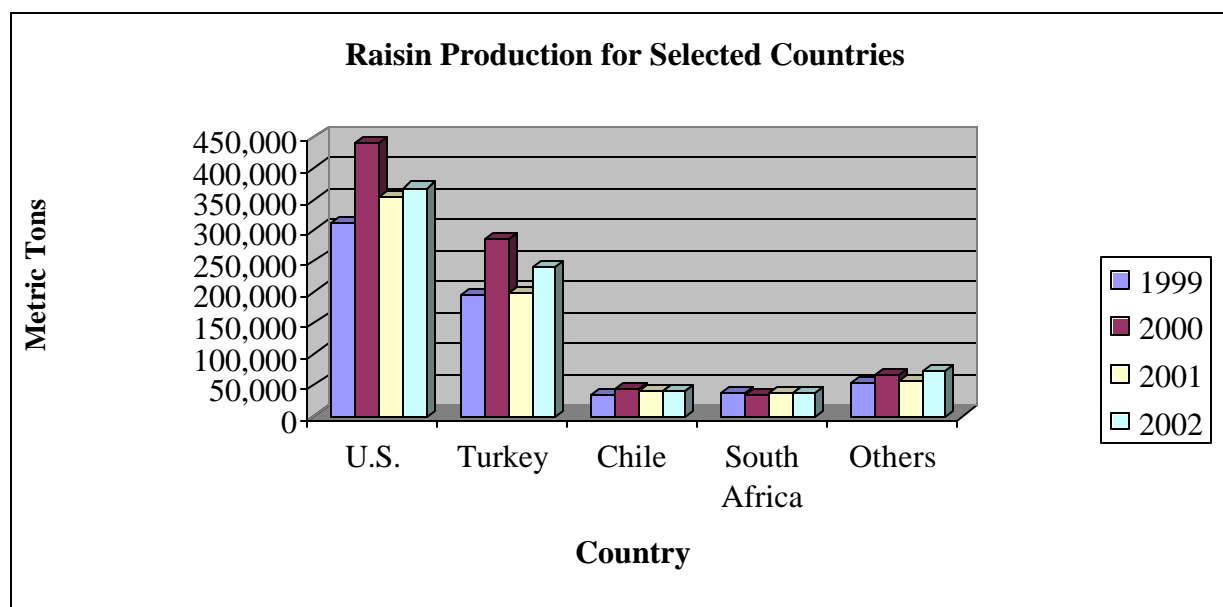
## Dried Fruit (Raisin) Situation and Outlook In Selected Countries

Raisin production in key producing countries in 2002/03 is forecast at 762,154 metric tons, a 10-percent increase from the previous year. In selected northern hemisphere countries, production is forecast to increase by 9 percent in 2002/03 (September 2002 - August 2003). Production in Turkey and Greece is projected to increase by a combined 18 percent as recently planted orchards begin to add to production yields and favorable weather conditions prevail. Mexico's production is expected to fall slightly due to adverse economic conditions. In the southern hemisphere, total raisin production in Australia, Chile and South Africa is forecast at 112,000 metric tons (tons), a 22-percent increase from the previous year. Overall, total exports from these selected countries are expected to increase due to the larger crops and the implementation of more aggressive exporting strategies.

### GLOBAL PRODUCTION & TRADE

The United States and Turkey are the largest raisin producers in the world. Combined, these two countries are expected to generate more than 553,802 tons of raisins in 2001/02. This accounts for more than 80 percent of the production among the world's key raisin producing countries.

The top four producers in 2001/02 are the United States (353,802 tons), Turkey (200,000 tons), Chile (41,500 tons) and South Africa (37,000 tons). Other major producers include Greece, Australia and Mexico.



## **Key Raisin Producing Countries in the Northern Hemisphere**

### **Greece**

Normal temperatures prevailed during the 2001/02 raisin growing season resulting in a 5-percent production increase. Raisin production for 2002/03 (September 2002 – August 2003) is expected to increase to 29,000 tons as a result of continued favorable weather conditions.

Lower priced exports from Turkey adversely affected Greece's trade activity in 2001/02. Traditional export markets for Greek raisins, including the United Kingdom (U.K.) and Germany, were primarily supplied with lower-priced Turkish sultanas. Traders reported that export prices (FOB Basis) for Greek sultanas fluctuated between 0.85-0.87 euros/kg for grade No 2. and 0.83-0.84 euros/kg for grade No. 4. According to local sources, Turkish sultanas entered the market with an FOB price at about 0.66 euros/kg. Greek raisin exports are expected to rebound in 2002/03 as the Turkish lira appreciates.

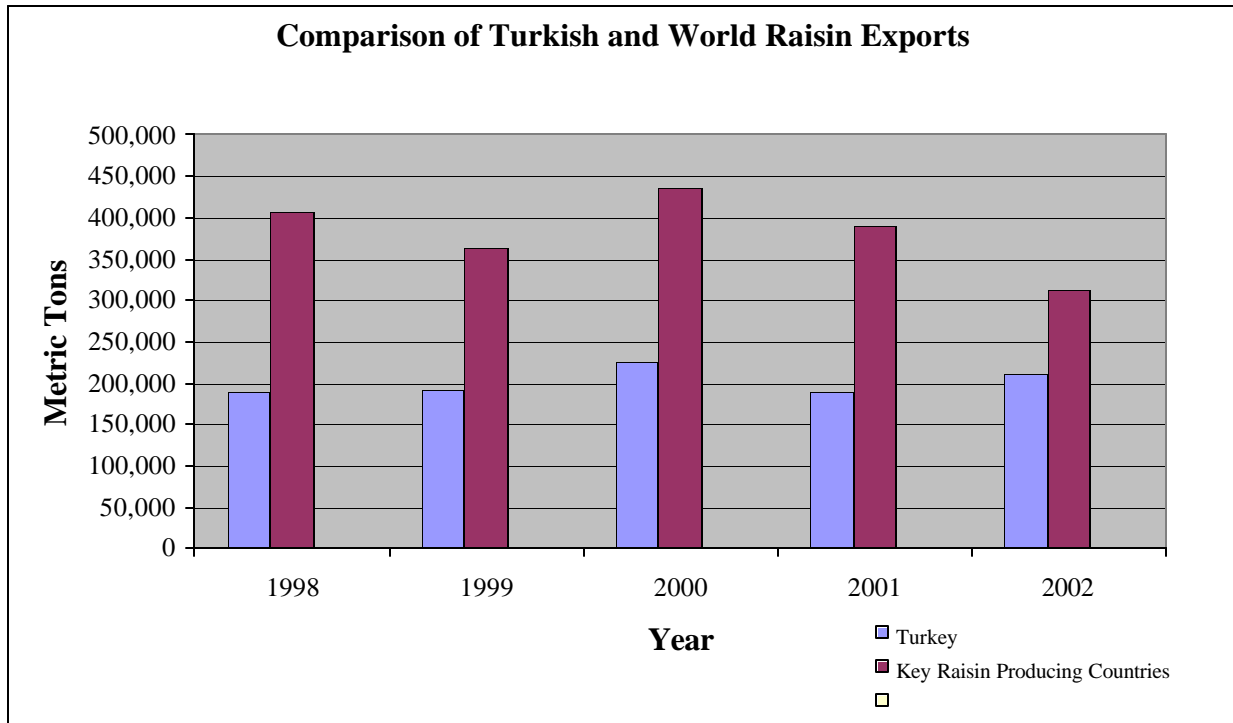
Raisin imports to Greece are minimal. In 2001/02, imports totaled 500 tons and trade conditions are unlikely to change.

### **Turkey**

2001/02 raisin production is expected to be slightly lower due to lower supplies and appreciation of the Turkish lira. The 2002/03 crop is forecast to increase by more than 26 percent as weather conditions and recently-planted orchards begin to bear fruit. The industry has, in recent years, sought to improve the quality of Turkish raisins through better growing, harvesting, and drying techniques designed to improve cleanliness. Improvements have included the widespread use of trellises, increasing use of small plastic harvest crates (rather than sacks to minimize compaction), and the widespread use of concrete drying beds and/or plastic sheeting. Private processors have financed most of these improvements and much of the capital was derived from higher export prices obtained as a result of the EU's minimum import price system. In general, Turkish raisins are lighter in color and rounder than California raisins. The color difference is due to the fact that lye is used to speed the drying of Turkish sultanas.

Turkey exports approximately 80 percent of its raisin production annually and is the largest raisin exporter in the world. Turkey's exports account for nearly 50 percent of all the raisin exports shipped among the key raising producing countries in the last four years. In 2002/03, an anticipated larger raisin crop is expected to increase exports by 11 percent to 210,000 tons. Germany, the United Kingdom, the Netherlands and Italy are the leading export markets for Turkish raisins. Due to increased global competition from South Africa, Australia and Greece, the Turkish Government has attempted to find new markets for Turkish exporters and continues its efforts to expand its presence in the United States market.

Raisin imports by Turkey remain relatively small at 1,000 tons. Although the government recently announced that the import duty on raisins of all origins was being reduced from 56.7 percent to 56.1 percent, this minimal reduction is unlikely to have an effect on raisin imports.



**Mexico**

Lower prices and lack of available credit are likely to decrease 2002/03 production by 12 percent to 13, 200 tons. Lower domestic and international prices are diverting some raisins for the wine and juice markets. Declining water resources are exacerbating the worsening conditions and are also expected to limit future raisin expansion.

Exports in 2002/03 are forecast to remain at 6,000 tons as a result of continued low raisin prices. The highest quality production is usually exported, mainly to the United States, and the rest is packaged for domestic consumers or used as food ingredients by the domestic baking and food processing industries.

Lower quality imports generally fill the void left by lower domestic production and raisin exports. In 2001/02, imports totaled 11,200 tons, primarily supplied by lower quality and lower-priced imports from Chile. Chile accounted for 86 percent of the total 1999/2000 and 2000/01 raisin imports. Source: FAS Agriculture Attaché Reports. Imported raisins, other than from the United States and Chile, have an import tariff of 25 percent. Under the North American Free Trade Agreement (NAFTA), both Mexico and the United States allow raisins to enter duty-free. Chilean raisins also enter duty-free under the existing Chile-Mexico FTA.



## **United States**

Raisin production for 2001/02 is estimated at 353,802 tons, down 20 percent from the previous year's record. Large stock levels and depressed prices continue to hamper the U.S. raisin industry. The 2002/03 crop is forecast to increase by 4 percent to 368,000 tons.

Large stock levels and competitive prices are expected to increase U.S. raisin exports for 2001/02 and 2002/03. U.S. raisin exports for August-April 2001/02 are up almost 2 percent from the same period in 2000/01. U.S. export to Malaysia jumped sharply during this period to 1,209 tons from 476 tons. The United Kingdom, Japan and Canada remain major markets for U.S. raisins.

Overall U.S. raisin imports are 17 percent higher between August-March 2001/02 compared to the same period a year ago, as a result of lower-priced products coming in from South America. Raisin imports from Argentina have risen significantly to 1,846 tons from 707 tons. Mexico's exports to the U.S. are up 16 percent. Imports are forecast to decline slightly as domestic prices for raisins continue to fall in 2002/03.

The Raisin Administrative Committee (RAC) requested \$2,900,000 in Market Access Program (MAP) funding to continue marketing activities in Asia, Scandinavia and the United Kingdom in 2002. RAC's main strategy will be to convince the trade sector of the value added qualities of raisins. Activities for this sector will include a variety of technical (baking) seminars, trade shows and new product development contests to communicate the message that raisins have value added qualities. In certain countries RAC adds a consumer strategy that focuses on the quality, nutrition and use of California raisins. The activities would be mostly in-store promotions and Public Relations. Their program in the U.K. includes funds for branded activities, which includes print advertising, features in store magazines, and trade and consumer advertising. Additionally, RAC also requested Emerging Market funds for China and Estonia to assist in capitalizing our perceived opportunities in the confectionary and baking industries. These proposals are under consideration.

## **Key Raisin Producing Countries in the Southern Hemisphere**

### **Australia**

In 2001/02, the raisin crop produced its lowest yields in history due to poor seasonal conditions. Low raisin prices and diversion of crops to wine production are also contributing to the decreased production of 13,676 tons. Favorable weather conditions and reduction in wine grape prices are expected to return raisin production to its normal levels in 2002/03; the raisin crop is forecast at 31,000 tons.

Exports are expected to rebound to 5,200 tons as a result of the larger production in 2002/03. Germany, the United Kingdom and Canada remain as leading export markets for Australia's raisins.

Australia is expected to import 15,000 tons of raisins from the world in 2002/03. Turkey remains the dominant raisin supplier to Australia, followed by Iran and Greece.

## **Chile**

In 2001, the raisin crop fell 8 percent as the availability of discarded table grapes decreased. Raisin production for 2002 is anticipated to be at 42,000 tons, similar to the previous year, as weather conditions remain relatively stable. Raisin production in Chile is based on lower quality table grapes and those rejected from the export process. It is expected that in the next few years, competition from the wine industry for discarded table grapes will disappear as vineyards recently planted with wine varieties continue coming into production. Such a development will significantly increase the annual availability of discarded table grapes for either juice concentrate or raisin production. Over half of Chile's raisin production consists of large-sized grapes, which have the smallest demand and lowest world prices.

Chilean raisins are primarily exported to the Latin America region including Mexico, Brazil, Colombia, Peru and Venezuela. The Netherlands, the U.K., and France are its leading European export markets. More than 90 percent of Chile's raisin production is exported.

No imports entered Chile in the past three years. A flat 8-percent import tariff was charged in 2001. This rate is expected to fall to 7 percent in 2002, and stay at 6 percent starting in 2003. In addition, an 18-percent value-added tax is charged on all consumer items, both domestic and imported.

## **South Africa**

The raisin crop is forecast to increase by 5 percent in 2002/03 to 39,000 tons. Lower prices for juice and wine are expected to divert grapes to raisin production and are likely to contribute to the larger crop. Favorable weather conditions are expected to increase the 2001/02 crop by 8 percent to 37,000 tons.

The devaluation of the rand is anticipated to contribute to a 4-percent increase in South African exports in 2001/02, with foreign shipments going to European markets including Germany, the Netherlands, the U.K., Portugal and France. Canada and Japan are also leading export markets. Raisin imports by South Africa are minimal.

*(The FAS Attaché Report search engine contains reports on the Dried Fruit industries for 6 countries, including Australia, Chile, and South Africa. For information on production and trade, contact Rey Santella at 202-720-0897. For information on marketing contact Kristin Kezar at 202-690-0556.)*

**RAISINS: PRODUCTION, SUPPLY, AND DISTRIBUTION**

**Marketing Year (August/July) 1998/99 - 2002/03**

**(Tons)**

| Country/ Marketing<br>Year 1/    | Beginning Stocks | Production | Imports 3/ | Exports | Domestic<br>Consumption 2/ | Ending Stocks |
|----------------------------------|------------------|------------|------------|---------|----------------------------|---------------|
| <b>NORTHERN HEMISPHERE</b>       |                  |            |            |         |                            |               |
| <b>Greece</b>                    |                  |            |            |         |                            |               |
| 1998/99                          | 2,930            | 28,000     | 4,000      | 24,000  | 4,500                      | 6,430         |
| 1999/2000                        | 6,430            | 22,500     | 1,000      | 23,000  | 4,500                      | 2,430         |
| 2000/01                          | 2,430            | 28,000     | 1,000      | 21,500  | 4,000                      | 5,930         |
| 2001/02                          | 5,930            | 28,500     | 500        | 24,000  | 7,430                      | 3,500         |
| 2002/03 F                        | 3,500            | 29,000     | 500        | 24,000  | 6,700                      | 2,300         |
| <b>Turkey</b>                    |                  |            |            |         |                            |               |
| 1998/99                          | 28,593           | 250,000    | 3,131      | 188,247 | 30,000                     | 63,477        |
| 1999/2000                        | 63,477           | 195,000    | 1,550      | 192,433 | 30,000                     | 37,594        |
| 2000/01                          | 37,594           | 285,000    | 3,101      | 226,232 | 30,000                     | 69,463        |
| 2001/02                          | 69,463           | 200,000    | 1,000      | 190,000 | 41,000                     | 39,463        |
| 2002/03 F                        | 39,463           | 240,000    | 1,000      | 210,000 | 40,000                     | 30,463        |
| <b>Mexico</b>                    |                  |            |            |         |                            |               |
| 1998/99                          | 0                | 20,000     | 4,474      | 13,142  | 11,332                     | 0             |
| 1999/2000                        | 0                | 12,000     | 8,278      | 7,783   | 12,495                     | 0             |
| 2000/01                          | 0                | 13,000     | 11,186     | 4,728   | 19,458                     | 0             |
| 2001/02                          | 0                | 13,500     | 11,200     | 6,000   | 18,700                     | 0             |
| 2002/03 F                        | 0                | 13,200     | 11,400     | 6,000   | 18,600                     | 0             |
| <b>United States</b>             |                  |            |            |         |                            |               |
| 1998/99                          | 146,273          | 227,703    | 24,579     | 110,591 | 196,632                    | 91,332        |
| 1999/2000                        | 91,332           | 310,529    | 17,370     | 79,995  | 204,252                    | 134,984       |
| 2000/01                          | 134,984          | 439,531    | 11,899     | 109,055 | 200,941                    | 276,418       |
| 2001/02                          | 276,418          | 353,802    | 20,000     | 110,000 | 203,000                    | 337,220       |
| 2002/03 F                        | 337,220          | 368,000    | 18,423     | 111,000 | 202,731                    | 409,912       |
| <b>Total Northern Hemisphere</b> |                  |            |            |         |                            |               |
| 1998/99                          | 177,796          | 525,703    | 36,184     | 335,980 | 242,464                    | 161,239       |
| 1999/2000                        | 161,239          | 540,029    | 28,198     | 303,211 | 251,247                    | 175,008       |
| 2000/01                          | 175,008          | 765,531    | 27,186     | 361,515 | 254,399                    | 351,811       |
| 2001/02                          | 351,811          | 595,802    | 32,700     | 330,000 | 270,130                    | 380,183       |
| 2002/03 F                        | 380,183          | 650,200    | 31,323     | 351,000 | 268,031                    | 442,675       |
| <b>Australia</b>                 |                  |            |            |         |                            |               |
| 1998/99                          | 4,000            | 38,500     | 11,481     | 14,485  | 32,196                     | 7,300         |
| 1999/2000                        | 7,300            | 21,119     | 16,885     | 5,599   | 35,105                     | 4,600         |
| 2000/01                          | 4,600            | 26,667     | 17,353     | 6,401   | 35,300                     | 6,919         |

|                                  |         |         |        |         |         |         |
|----------------------------------|---------|---------|--------|---------|---------|---------|
| 2001/02                          | 6,919   | 13,676  | 17,400 | 4,416   | 32,579  | 1,000   |
| 2002/03 F                        | 1,000   | 31,000  | 15,000 | 5,200   | 35,000  | 6,800   |
| <b>Chile</b>                     |         |         |        |         |         |         |
| 1998/99                          | 3,041   | 27,820  | 0      | 27,017  | 3,500   | 344     |
| 1999/2000                        | 344     | 36,000  | 0      | 32,563  | 3,500   | 281     |
| 2000/01                          | 281     | 45,000  | 0      | 41,576  | 3,500   | 205     |
| 2001/02                          | 205     | 41,500  | 0      | 38,000  | 3,500   | 205     |
| 2002/03 F                        | 205     | 42,000  | 0      | 38,400  | 3,500   | 305     |
| <b>South Africa; Republic of</b> |         |         |        |         |         |         |
| 1998/99                          | 5,744   | 40,358  | 0      | 28,214  | 12,600  | 5,288   |
| 1999/2000                        | 5,288   | 38,142  | 1      | 20,926  | 13,000  | 9,505   |
| 2000/01                          | 9,505   | 34,000  | 1      | 25,900  | 12,000  | 5,606   |
| 2001/02                          | 5,606   | 37,000  | 1      | 27,000  | 10,500  | 5,107   |
| 2002/03 F                        | 5,107   | 39,000  | 1      | 28,800  | 11,200  | 4,108   |
| <b>Total Southern Hemisphere</b> |         |         |        |         |         |         |
| 1998/99                          | 12,785  | 106,678 | 11,481 | 69,716  | 48,296  | 12,932  |
| 1999/2000                        | 12,932  | 95,261  | 16,886 | 59,088  | 51,605  | 14,386  |
| 2000/01                          | 14,386  | 105,667 | 17,354 | 73,877  | 50,800  | 12,730  |
| 2001/02                          | 12,730  | 92,176  | 17,401 | 69,416  | 46,579  | 6,312   |
| 2002/03 F                        | 6,312   | 112,000 | 15,001 | 72,400  | 49,700  | 11,213  |
| <b>Grand Total</b>               |         |         |        |         |         |         |
| 1998/99                          | 190,581 | 632,381 | 47,665 | 405,696 | 290,760 | 174,171 |
| 1999/2000                        | 174,171 | 635,290 | 45,084 | 362,299 | 302,852 | 189,394 |
| 2000/01                          | 189,394 | 871,198 | 44,540 | 435,392 | 305,199 | 364,541 |
| 2001/02                          | 364,541 | 687,978 | 50,101 | 399,416 | 316,709 | 386,495 |
| 2002/03 F                        | 386,495 | 762,200 | 46,324 | 423,400 | 317,731 | 453,888 |

Source: U.S. Foreign Agricultural Attaché Reports, USDA, National Agricultural Statistics Service.

1/ Northern Hemisphere marketing years begin August 1, and September 1 in Turkey. Marketing years for Southern Hemisphere raisins, (which are harvested early in the second of the split years shown) begin Jan. 1, and March 1 in Australia

2/ Domestic consumption figures include raisins used for feed and distillation purposes. 3/ Imports include currants. U.S. production data have been converted to a packed weight basis in order to align them with the other supply and distribution statistics.

F = Forecast

**U.S. EXPORTS OF RAISINS**  
**Marketing Year (August/July) 1998/99 - 2000/01**  
**and 2000/01-2001/02 August/March Comparisons**  
**(Tons)**

| <b>Destination</b>     | <b>1998/99</b> | <b>1999/00</b> | <b>2000/1</b>  | <b>August/March<br/>2000/01</b> | <b>August/March<br/>2001/02</b> | <b>Percent<br/>Changed</b> |
|------------------------|----------------|----------------|----------------|---------------------------------|---------------------------------|----------------------------|
| <b>North America</b>   |                |                |                |                                 |                                 |                            |
| Canada                 | 12,121         | 10,722         | 11,793         | 8,257                           | 8,121                           | -1.65%                     |
| Mexico                 | 896            | 1,173          | 630            | 579                             | 270                             | -53.35%                    |
| <b>Subtotal</b>        | <b>13,017</b>  | <b>11,895</b>  | <b>12,422</b>  | <b>8,836</b>                    | <b>8,391</b>                    | <b>-5.04%</b>              |
| <b>European Union</b>  |                |                |                |                                 |                                 |                            |
| Sweden                 | 4,368          | 3,527          | 4,805          | 3,493                           | 3,236                           | -7.35%                     |
| Finland                | 2,270          | 1,725          | 1,614          | 1,318                           | 1,371                           | 4.08%                      |
| Denmark                | 5,148          | 3,177          | 3,852          | 2,750                           | 2,052                           | -25.36%                    |
| United Kingdom         | 22,195         | 11,516         | 24,101         | 15,901                          | 16,457                          | 3.50%                      |
| Netherlands            | 3,471          | 2,812          | 5,551          | 4,038                           | 2,853                           | -29.34%                    |
| France                 | 669            | 625            | 275            | 161                             | 276                             | 71.18%                     |
| Germany                | 5,092          | 3,280          | 7,095          | 4,418                           | 4,260                           | -3.60%                     |
| Spain                  | 587            | 499            | 505            | 294                             | 572                             | 94.59%                     |
| Belgium-Lux.           | 926            | 691            | 889            | 594                             | 631                             | 6.32%                      |
| Italy                  | 221            | 117            | 320            | 278                             | 57                              | -79.60%                    |
| Ireland                | 110            | 75             | 72             | 47                              | 46                              | -1.71%                     |
| <b>Subtotal</b>        | <b>45,057</b>  | <b>28,042</b>  | <b>49,079</b>  | <b>33,291</b>                   | <b>31,811</b>                   | <b>-4.45%</b>              |
| <b>Asia</b>            |                |                |                |                                 |                                 |                            |
| Singapore              | 2,776          | 2,162          | 2,025          | 1,470                           | 1,285                           | -12.57%                    |
| Malaysia               | 686            | 577            | 907            | 476                             | 1,209                           | 153.89%                    |
| Korea, Republic of     | 1,654          | 1,122          | 2,304          | 1,723                           | 1,999                           | 15.97%                     |
| Hong Kong              | 1,763          | 1,368          | 2,436          | 1,956                           | 2,022                           | 3.41%                      |
| Taiwan                 | 3,887          | 2,639          | 3,835          | 2,772                           | 2,786                           | 0.50%                      |
| Japan                  | 30,014         | 22,760         | 22,840         | 15,059                          | 15,132                          | 0.48%                      |
| <b>Subtotal</b>        | <b>40,779</b>  | <b>30,627</b>  | <b>34,347</b>  | <b>23,456</b>                   | <b>24,433</b>                   | <b>4.16%</b>               |
| <b>Other Countries</b> |                |                |                |                                 |                                 |                            |
| <b>New Zealand</b>     | <b>1,312</b>   | <b>1,003</b>   | <b>1,319</b>   | <b>929</b>                      | <b>724</b>                      | <b>-22.02%</b>             |
| <b>Norway</b>          | <b>2,309</b>   | <b>2,045</b>   | <b>2,384</b>   | <b>1,730</b>                    | <b>1,617</b>                    | <b>-6.55%</b>              |
| <b>All Others</b>      | <b>8,117</b>   | <b>6,383</b>   | <b>9,504</b>   | <b>6,632</b>                    | <b>8,950</b>                    | <b>34.95%</b>              |
| <b>Grand Total</b>     | <b>110,591</b> | <b>79,995</b>  | <b>109,055</b> | <b>74,874</b>                   | <b>75,927</b>                   | <b>1.41%</b>               |

Source: U.S. Bureau of the Census

**U.S. IMPORTS OF RAISINS**  
**Marketing Year (August/July) 1998/99 - 2000/01**  
**and 2000/01-2001/02 August/March Comparisons**  
**(Tons )**

| Origin               | 1998/99       | 1999/2000     | 2000/01       | August/March<br>2000/01 | August/March<br>2001/02 | Percent Changed |
|----------------------|---------------|---------------|---------------|-------------------------|-------------------------|-----------------|
| CHILE                | 4,362         | 5,747         | 4,680         | 2,371                   | 2,412                   | 2%              |
| MEXICO               | 11,070        | 6,305         | 3,849         | 3,067                   | 3,561                   | 16%             |
| SOUTH AFRICA, REPUB  | 963           | 1,286         | 1,385         | 853                     | 669                     | -22%            |
| ARGENTINA            | 1,799         | 2,488         | 1,380         | 707                     | 1,846                   | 161%            |
| IRAN                 | 0             | 9             | 221           | 146                     | 117                     | -20%            |
| PAKISTAN             | 349           | 608           | 192           | 185                     | 39                      | -79%            |
| TURKEY               | 1,412         | 368           | 52            | 32                      | 46                      | 41%             |
| CHINA, PEOPLES REPUB | 15            | 0             | 45            | 42                      | 1                       | -97%            |
| UNITED ARAB EMIRATES | 0             | 16            | 42            | 42                      | 0                       | -100%           |
| AFGHANISTAN          | 4,287         | 419           | 17            | 17                      | 0                       | -100%           |
| UZBEKISTAN, REPUBLIC | 137           | 0             | 17            | 0                       | 0                       | 0%              |
| MACAU                | 0             | 0             | 15            | 0                       | 0                       | 0%              |
| LEBANON              | 0             | 1             | 5             | 5                       | 5                       | 9%              |
| AUSTRALIA            | 2             | 0             | 0             | 0                       | 0                       | 0%              |
| CANADA               | 0             | 31            | 0             | 0                       | 7                       | 0%              |
| GERMANY              | 20            | 0             | 0             | 0                       | 0                       | 0%              |
| REST OF WORLD        | 164           | 92            | 0             | 0                       | 0                       | 0%              |
| <b>Grand Total</b>   | <b>24,759</b> | <b>17,370</b> | <b>11,899</b> | <b>7,466</b>            | <b>8,702</b>            | <b>17%</b>      |

Source: U.S. Bureau of the Census

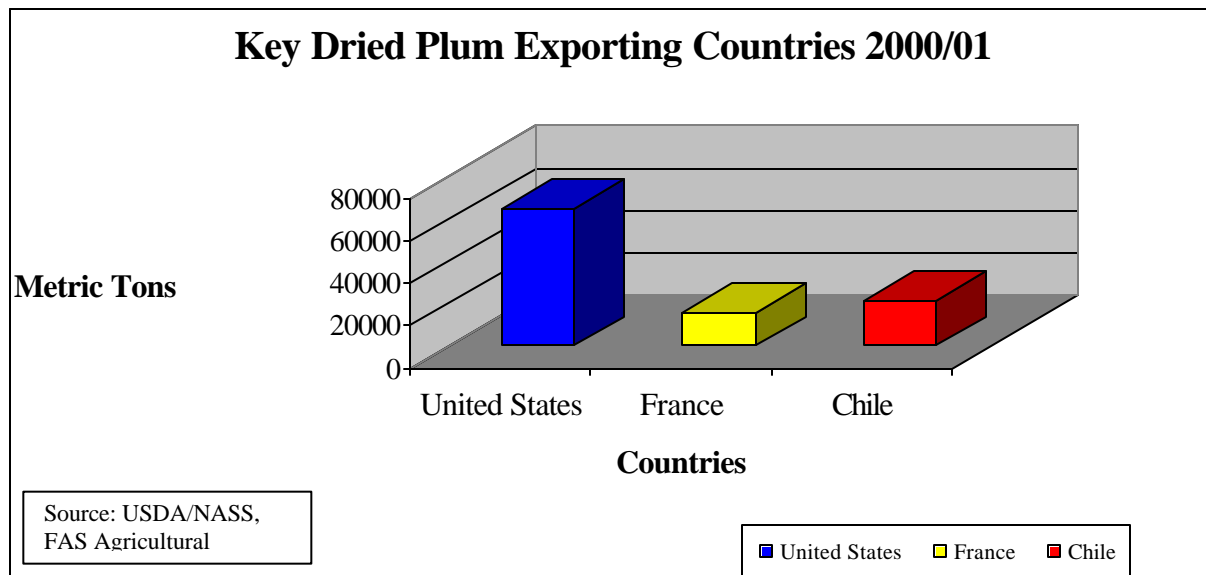
## Dried Fruit (Dried Plum -Prune) Situation in Selected Countries

Total dried plum production for 2001/02 for selected countries is forecast at 191,656 tons, down 27 percent from the previous year. Dried plum production is expected to be at normal levels in France and Chile, while production in the United States is anticipated to be smaller as a result of production limitation programs. Dried plum exports are expected to fall by 5 percent as a result of smaller crops and flat international demand.

### GLOBAL PRODUCTION & TRADE

The United States, France and Chile are the world's key dried plum producers. Combined, these countries are expected to generate more than 199,656 tons of dried plums in 2001/02.

These countries also are the world's largest exporters of dried plums. Chile exports approximately 90 percent of its production, the United States 46 percent and France 29 percent.



### United States

The 2001/02 dried plum crop is forecast at 120,656 tons, a 66-percent decrease from last year's record crop. This smaller crop is supplemented by a carry-in of 101,000 tons from the previous year. The industry's longer-term outlook shows significantly larger supplies of dried plums as a result of increased planting of the early 1990s. In anticipation of the increased supplies, the industry implemented an USDA-funded \$17 million tree removal program in January 2002 to help stabilize production levels.

As a result of the larger crop, total U.S. dried plum exports in 2000/01 increased by more than 26 percent from the preceding year to 81,942 tons. Exports in 2001/02 are down 8 percent from 2000/01 between August 2001 and March 2002. To date, exports to the industry's largest export markets (Germany and Japan) are down a combined 24 percent. Shipments to Poland, on the other hand, are up 118 percent to 1,107 tons.

The California dried plum industry, represented by the California Dried Plum Board, exports 46 percent of its production to more than 50 markets. Market Access Program funds are used to market dried plums in Japan, Germany, the United Kingdom, Italy and China/Hong Kong. Japan and the European markets comprise about 60 percent of total export sales. Stiff competition from subsidized French dried plum producers/growers, as well as increased U.S. production, make for a challenging time for the U.S. prune industry.

## **France**

France, the United States largest competitor, typically accounts for 15 to 20 percent of the world's dried plum production and competes with the U.S. industry in all the major EU export markets. Dried plum production is expected to return to normal levels after several years of underproduction. In MY 2001/02, dried plum production is forecast at 56,000 tons, a 27-percent increase from the previous year. To date, weather conditions have been favorable resulting in expectations that next year's crop will be at the same levels as the current year.

After the 1996 crisis of prune overproduction, French prune growers organized a production limitation system, similar to a pull-out program. Since 1997, harvests have been considerably lower, except in 2001, and French prune growers are currently organizing a planting program with a goal of 300 hectares planted per year for two years. This was decided by the entire prune industry, including the producers (97 percent of registered growers organizations), the processors and the traders. The objective was to stabilize the orchards at a level of 14,500 hectares.

The French Prune Producers' Board funds promotional activities in the United Kingdom, Netherlands, Germany, Italy and Spain. Traditionally, the EU Commission has set new minimum grower prices and a subsidy for prune processors. The processors pay this price to producers and are subsequently reimbursed with a subsidy from the EU. This subsidy conveys a significant advantage to French exporters in exporting throughout the European Union. In 2001/02, dried plum exports are expected to reach 16,000 tons.

Dried plums produced domestically are either consumed directly or are processed into food products like juice or ingredients for cookies and yogurts. During the 2000/01 marketing year, about 2,500 tons of prunes were processed into 5,455 tons of processed products.

## **Chile**

The 2001 (January-December) crop is estimated to remain unchanged from the previous year at 22,500 tons, as a result of good weather conditions. Dried plum production in 2002 is forecast slightly larger, up to 23,000 tons, due to an increase in planted/harvested areas. Chile harvests plums from mid-February through mid-April, entirely by hand. This greatly enhances quality



since the fruit is picked at peak ripeness and maturity. Dried plums are mainly sun-dried, although there are also some drying tunnels.

Chile's dried plum exports are estimated to slightly increase in 2001, up 8 percent from the previous year. Exports are forecast to increase in 2002 due to a larger crop. Chilean dried plums are ready for shipment from the end of April through November. Latin America remains Chile's main dried plum customer. No significant changes are expected in the coming years. Three exporters account for nearly 70 percent of total export volume. Mexico, Brazil, Spain, Germany and Peru are leading export markets.

*(The FAS Attache Report search engine contains reports on the Dried Fruit industries for 8 countries, including South Africa, Turkey and Australia. For information on production and trade, contact Rey Santella at 202-720-0897. For information on marketing contact Ingrid Mohn at 202-720-5330)*

## Processed Tomato Products Situation and Outlook in Selected Countries

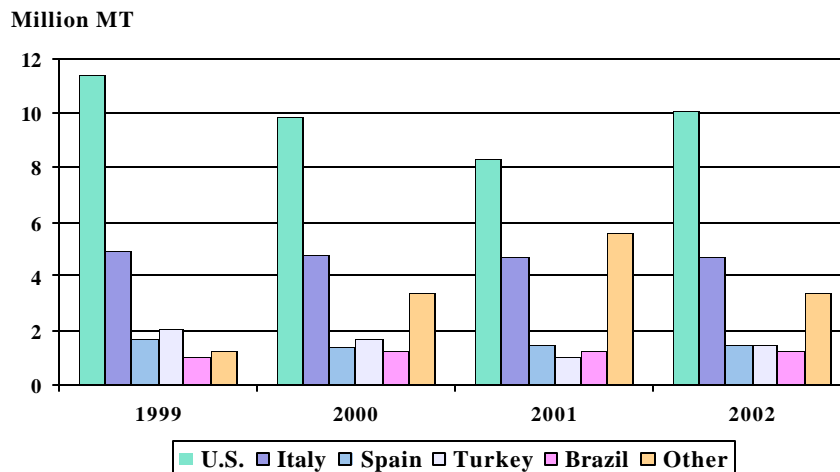
Production of tomatoes for processing in 11 major producing countries in 2002 is forecast at 22.3 million tons, up 9 percent from 2001. The increase was attributed mainly to a 22-percent increase in U.S. output as well as increases in Turkey (up 12 percent) and Portugal (up 6 percent). Production of tomato paste in selected countries, excluding the United States, in 2002/03 is forecast at 1.35 million tons, unchanged from last year, due mostly to continued abundant supplies and lower prices. Production of canned tomato pack in selected countries in 2002/03 is forecast at 2 million tons, down 2 percent from last year, due to an expected drop in production in both Italy and Greece. During this same period, exports of tomato paste from selected countries are forecast at 928,000 tons, up 8 percent from 2001/02, while exports of canned tomato pack are forecast at 1.01 million tons, up 2 percent from 2001/02.

### GLOBAL PRODUCTION & TRADE

World production of tomatoes for processing is expected to reach 22.3 million tons in 2002/03, up 9 percent from the previous year. The United States produces approximately 46 percent of all the tomatoes for processing produced worldwide.

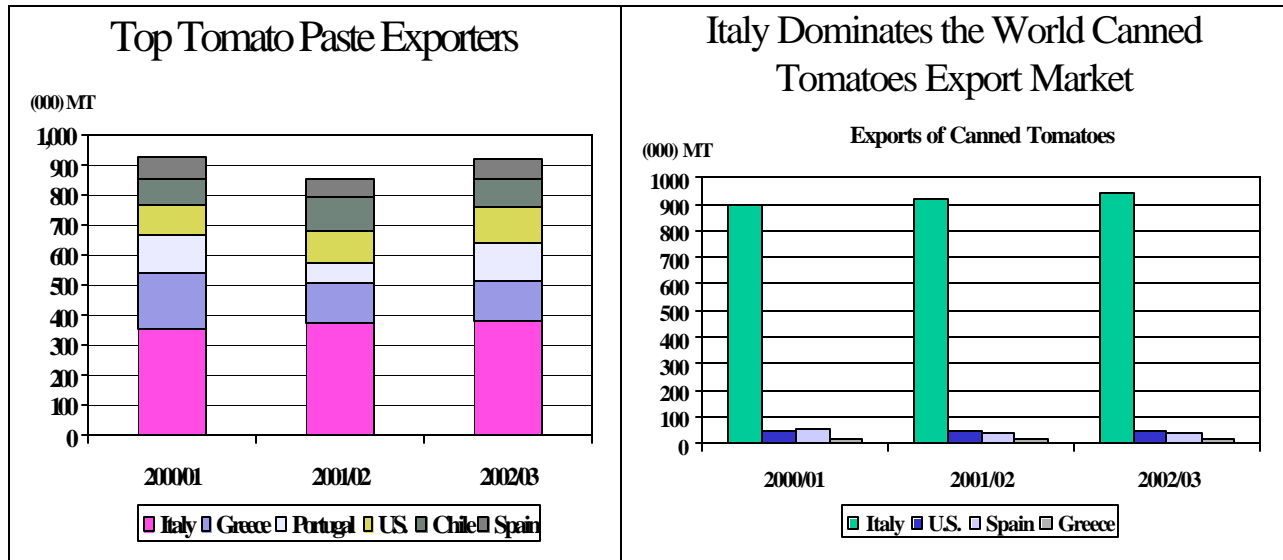
The top four producers in 2001/02 are the United States (10.1 million tons), Italy (4.7 million tons), Spain (1.45 million tons) and Turkey (1.45 million tons). Other key producers include Brazil, Portugal, and Chile.

### World Production of Tomatoes for Processing



Source: USDA/FAS Agricultural Attaché Reports

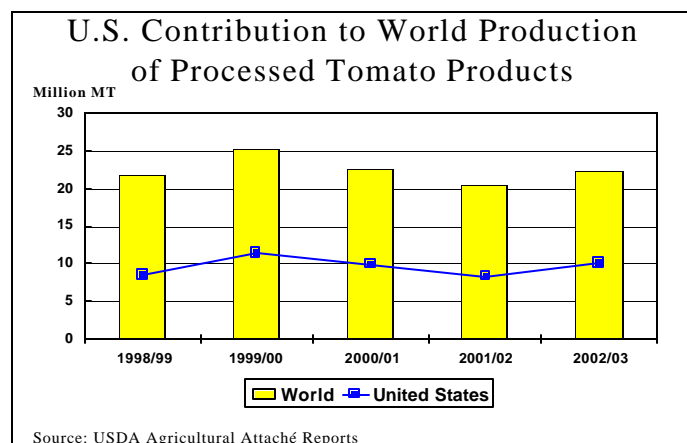
Production of canned tomato pack in selected countries in 2002/03 is forecast at 2 million tons, down 2 percent from last year, due to an expected drop in production in both Italy and Greece. During this same period, exports of tomato paste from selected countries are forecast at 928,000 tons, up 8 percent from 2001/02, while exports of canned tomato pack are forecast at 1.01 million tons, up 2 percent from 2001/02.



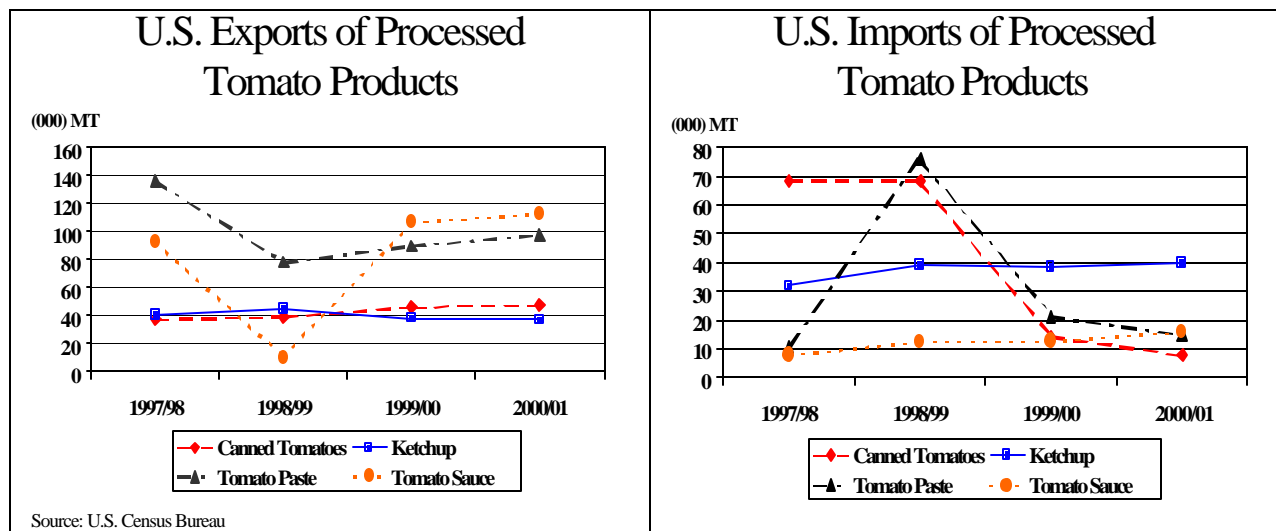
### Western Hemisphere

#### United States

Production of processing tomatoes under contract in 2002 is estimated at 10.1 million tons, up 22 percent from 2001. The increase in output is due mainly to a major increase in area planted caused by smaller carryover of stocks and higher wholesale prices for tomato products during the marketing year. The bulk of U.S. tomatoes for processing are for tomato paste output.



California accounts for about 95 percent of the U.S. processing tomato crop. As of May 15, California's tomato processors reported they have or will have contracts for 9.53 million tons of processing tomatoes for 2002. This production is 23 percent more than the contracted production of last year. Planted area for contracted production is expected to rise 11 percent from last year to 114,121 hectares. Due to excellent weather conditions, processors are expecting a high yielding crop.



## Mexico

Production of tomatoes for processing in 2002 is forecast at 96,000 tons, down 30 percent from an earlier forecast, mainly due to a reduction in planted area. The reduction is attributed to less utilization from the processing industry, decreased international demand, and lower world prices. Tomato paste production in Mexico in 2002/03 (March to February) is forecast at 11,000 tons, down 22 percent from the revised volume in 2001. As in previous years, world supplies continue to be very high and costs of production continues to rise. Industry experts claim that importing tomato paste from the United States, China, and Chile is less expensive than producing in Mexico, thus forcing Mexican companies to reduce production. The situation has become so critical that some companies have completely stopped production and importation of tomato paste for processing into other products.

Mexico's possibilities of increasing its tomato paste exports have dwindled as the United States has increased tomato paste exports. In addition, China's access to the international market, with high levels of production, has lowered international prices. As the industry finds that it is more profitable to import tomato paste, exports for 2002 are forecast to decrease further. The main markets for Mexican tomato paste are still the United States and South America. Tomato paste imports for 2002 are expected to increase to meet the expected demand from the domestic market, as the industry faces a decrease in production and international prices remain low.

## **Brazil**

Production of tomatoes for processing in 2002 is forecast at 1.27 million tons, up 2 percent from the revised level in the previous year. Sales and associated prices of the 2001 crop were considerably better than during the previous year, thereby encouraging producers to increase acreage and production. Increased success in fighting pests in the Bahia region should also contribute to the production increase. New higher-yielding tomato varieties are also expected to further boost yields and production. Nearly all of Brazil's processing tomatoes are made into paste. Output of tomato paste in 2002 is forecast at 130,000 tons unchanged from the previous year.

Historically, the majority of Brazilian imports of tomato products are in the form of tomato paste, which is used to supplement domestic production and is further processed in Brazil into consumer-ready sauces and other similar products. In the past, the vast majority of Brazilian imports of tomato products have come from Chile, as they are the largest and most efficient producer in the region. Imports of most tomato products dropped considerably in 1999 due to the January 1999 devaluation of the Brazilian currency increased the cost of imported products. The United States is the leading supplier of ketchup to Brazil.

## **Chile**

Production of tomatoes for processing in 2002 is forecast at 935,000 tons, down 4 percent from 2001, due largely to lower-than-expected tomato quality as a result of adverse weather conditions. Tomatoes for processing in Chile are planted from mid-September through December and harvested from January 10 to April 15. Output of tomato paste in 2002 is forecast at 102,000 tons, down 8 percent from 2001. This drop is due in part to the lower-than-expected output of tomatoes for processing.

## **Mediterranean Area**

Production of tomatoes for processing in 2002 in the major producing countries in the European Union (EU) is forecast at 8.3 million tons, about the same as the previous year. Under the reformed common market organization (CMO) for fruits and vegetables of 2001, the minimum price for fresh tomatoes to be processed is no longer applicable. The producer organizations and the processors now set this price. Only tomatoes delivered by a producer organization and corresponding to some quality standards will get subsidies from the EU. Subsidies are now paid directly to growers through the producer organizations and reduced proportionally if production exceeds the national quota. Compensations are possible when other EU countries' processing tomato production falls below their national quotas. This new system seems to favor processors because they will not have to pay a fixed minimum price to growers in order to receive a processing subsidy. In addition, the processors will be free to purchase processing tomatoes from whatever source they chose, including from foreign markets.

## **Spain**

Production of tomatoes for processing in 2002 is forecast at 1.45 million tons, down slightly from 2001. Improvement in mechanization, as well as new varieties and technologies, are increasing yields and

productivity. Production of canned tomatoes under the new CMO reforms for processing tomatoes will be located more and more in Extramadura, a region in western Spain where land and water are abundant.

The market price for tomatoes for processing was about \$47.30 per ton in marketing year 2001/02. Farmers and processors have agreed to a price of \$45.75 per ton for marketing year 2002/03. Besides this market price, farmers will also receive a EU subsidy of \$28.60 per ton of fresh tomatoes for processing into paste or most other tomato products and \$31.30 per ton for processing into whole peeled tomatoes. At these rates, farmers delivering to processors receive about 60 percent of their income from the market and the remaining 40 percent from EU subsidies. If the production quotas for processing were removed, Spain could increase production dramatically. Despite the penalty of 10 percent in the subsidy for processing tomatoes (other than whole peeled tomatoes) the production for processing remains profitable.

In calendar year 2001, exports of tomato paste declined by 20 percent compared to the previous year. Imports of tomato paste remained stable, as a spike in imports from China was offset by a decline from other suppliers. Spanish processors are very concerned about imports from China, which they believe will become a very strong competitor in the next few years. Imports of whole peeled tomatoes declined dramatically due to lower local consumption. Most exports of canned tomatoes and tomato paste went to other EU countries. Exports of canned tomatoes to the United States rose by 20 percent in 2001.

## **Portugal**

Production of tomatoes for processing in 2002 is forecast at 972 million tons, up six percent from 2001. Yields for 2001/02 averaged 78 mt/hectare, 20 percent above last year, due to a combination of good weather plus some rains over the whole season. Crop quality and color is reportedly very good. In addition, industrial yields and quality are also reported to be good, although the average solid content in the crop is considered normal. Roughly 80 percent of total production in Portugal is produced in the Ribatejo e Oeste and the Algarve areas. Most of the tomatoes for processing are produced on small 5-10 hectare plots. However, the structure of the industry is changing, and an estimated 50 percent of all tomato areas (6,000 hectares) now consist of larger-scale plots with new direct-seeding technologies. All areas are irrigated. While the low cost of rural labor is one advantage that the Portuguese sector enjoys, costs of other inputs (especially land cost) are reported to be much higher than in the rest of the EU.

Exports of tomato paste are estimated at 124,000 tons in 2001, slightly above the previous year's level. The main export market continues to be the EU followed by Japan. Sales to the United States are minimal. Processors in Portugal are very concerned about the large increase of Chinese products being imported into the EU. Although the quality is reportedly mixed, Portuguese processors believe that the quality of Chinese products will improve in the near future. Processors are already contemplating new products to replace the production of tomato paste.

## **Greece**

Production of tomatoes for processing in 2002 is forecast at 880,000 tons, down 9 percent from a year ago, due largely to a decrease in planted area. Production of tomato paste in Greece in 2002 is forecast at

134,000 tons, down 8 percent from 2001. Only 17 plants will process tomato paste during the 2002 season compared to 38 plants in 2000. Most of the plants are located in Macedonia, Thrace, and Thessaly. The reduced number of operating plants reflects the financial problems of the Greek tomato paste industry. Canned tomato production in 2002 is forecast at 28,400 tons, down 10 percent from 2001, due mostly to large 2001 ending stocks and low world prices. Countries such as China and Israel are entering the market with extremely low prices. At the same time, recent changes in EU policies have caused reductions in the support price paid to growers from \$.07/kg to \$.02/kg today. This development has contributed to farmers' fears that their income from industrial tomatoes will be reduced. Most processing tomato farmers are trying to increase their income by utilizing part of their land resources for crops other than tomatoes, such as cotton, cucumber, onions, and corn.

The foreign demand for tomato paste at present is low because of large world production levels in recent years. At present, prices for the 2002 crop product are approximately the same as last year and Greek producers have already proceeded with advanced sales to their traditional buyers.

### **France**

Production of tomatoes for processing in 2002 is forecast at 297,000 tons, down slightly from 2001 as a result of a decrease in subsidy for French tomato growers. In Europe, France is a minor producer of processed tomato products, with 4 percent of the total European production. The EU threshold for France set in 2001 by the EU under CMO for fruits and vegetables was 401,500 tons of fresh tomatoes.

Production of tomato paste accounts for the bulk of processed tomatoes in France. In 2002, output of paste is forecast at 42,200 tons, unchanged from the previous year. Production of canned tomatoes for the same period is forecast at 5,900 tons, also unchanged from 2001. France is a minor producer of processed tomato products and continues to be a net importer of both canned tomatoes and tomato paste. There is almost no trade between the United States and France for these products.

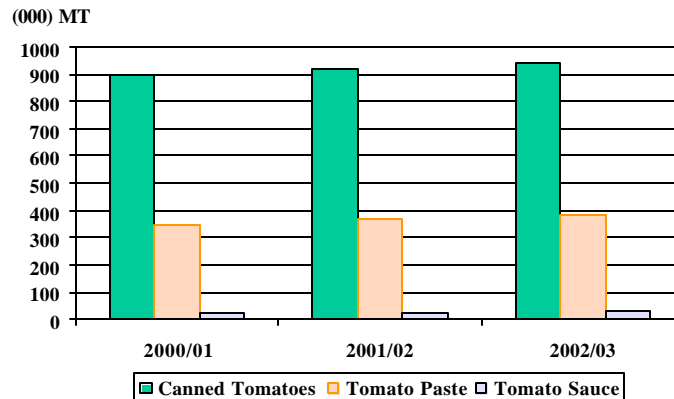
### **Italy**

Production of tomatoes for processing in 2002 is forecast at 4.7 million tons, up slightly from the previous year, due to an increase in yields. Since 2001, the Italian national production quota was set at 4.35 million tons. That means that Italian processing tomato output exceeded the quota by over 350,000 tons, including tomato juice. Under the new EU tomato system, growers in 2002 will receive \$32/ton, down slightly from the previous year. Subsidies are now paid directly to growers through producer organizations and reduced proportionally if production exceeds the national quota. Compensations are possible when other EU countries' processing tomato production falls below their national quotas. This occurred in 2001 and therefore the situation permitted a reduction to the cut in Italian subsidies.

Italian exports of tomato products continue to increase. Prices of Italian tomato exports remained competitive in the international market due to a large domestic supply. Most Italian exports, especially whole tomatoes, are delivered to European and other developed countries. However, a significant share of tomato paste exports is of low quality and is destined for Russia and some of the African countries. Most of

this tomato product is prepared using tomato paste for reprocessing imported duty-free from Greece, Turkey, China, and other countries where production costs are much lower. In 2001, 84 percent of total tomato paste imports came from China.

## Italian Exports of Processed Tomato Products



Source: U.S. Agricultural Attaché Report, USDA

### Israel

Production of tomatoes for processing in 2002 is forecast at 165,000 tons, up 13 percent from the revised output in 2001, which was one of the worst years for the Israeli's tomato processing industry. The total area planted for processing tomatoes is dictated by the quantities the processors are willing to accept. In 2001, 1,650 hectares were planted, compared to 2,150 hectares in crop year 2000. In 2002, planted area will remain almost the same. The Golan Heights, previously an important growing area, mainly for the late ripening varieties, has almost abandoned tomato production due to severe water shortages. Farms there have shifted most of their reduced irrigation quotas to their fruit orchards. Economies of size are a key factor in the production of tomatoes for the processing industry. They have caused most small holders to abandon the industry to large cooperative farms or private companies. Between 85 and 90 percent of all processing tomatoes are produced on large holdings of 50 to 150 hectares. In 2002, production of tomato paste in Israel is forecast at 18,975 tons, up 15 percent from the previous year, due mostly to a large increase in tomato deliveries to processors.

Exports have declined steadily in recent years from a level of \$33 million in 1995, to \$14 million in 1999, and only \$8 million in 2000. The decline is a result of surpluses in the world market and the failure of Israeli producers to compete with low-cost producers such as China.

### Turkey

Production of tomatoes for processing in 2002 is forecast at 1.45 million tons, up 12 percent from the previous year, due mainly to insufficient local stocks and expectations for increased exports. Commercial tomato paste production for 2002 is projected to reach 220,000 tons, up 30 percent from last year. Higher prices, which are the result of low domestic stocks, and an expected 10-percent increase in exports, are the



reasons for this increase. Also, processors in Turkey are cautious about the potentially large output in California and extremely low export prices offered by China, and are not willing to increase their overall production volume to the 300,000-ton level that was achieved a few years ago. Access to the EU-market also remains a major problem due to a dispute over duty free EU meat exports to Turkey.

The Turkish tomato paste industry is very dependent on exports. In recent years, exports to traditional markets, particularly Libya and Algeria, have declined sharply as a result of political and economic problems in the importing countries. To compensate for the loss of these markets, the Turkish industry is turning increasingly to quality markets, particularly Japan and non-EU European countries. Japan continues to be Turkey's leading export destination because the Japanese prefer the color and taste of Turkish paste and believe that hand picking improves the quality. The EU is not allowing Turkey to utilize its 38,400-ton duty free tomato paste export quota due to a dispute over duty free EU meat exports to Turkey. Over quota imports of tomato paste to the EU are subject to a 15 percent tariff. Industry members believe that Turkey has a comparative advantage in production and processing over the European producers and will benefit greatly from the resolution of quota disputes.

*The Attaché Report search engine contains reports on the Processed Tomato industry for several countries including Brazil, Chile, France, Greece, Israel, Italy, Mexico, Portugal, Spain, and Turkey. For more information on production and trade, contact Erik Hansen at 202-720-0875. Also, please visit the processed vegetables commodity page: [http://www.fas.usda.gov/htp/horticulture/Proc\\_Veg.html](http://www.fas.usda.gov/htp/horticulture/Proc_Veg.html) for further information.*

**Table 1: Production of Processing Tomatoes in Selected Countries**

| <b>Region/<br/>Country</b>   | <b>1997/98</b>              | <b>1998/99</b> | <b>1999/00</b> | <b>2000/01</b> | <b>2001/02</b> | <b>2002/03</b> |
|------------------------------|-----------------------------|----------------|----------------|----------------|----------------|----------------|
|                              | <b>Thousand Metric Tons</b> |                |                |                |                |                |
| <b>North America</b>         |                             |                |                |                |                |                |
| United States                | 9,047                       | 8,523          | 11,416         | 9,851          | 1/ 8,316       | F 10,083       |
| Mexico                       | 300                         | 290            | 190            | 112            | 96             | 100            |
| Total                        | 9,347                       | 8,813          | 11,606         | 9,963          | 8,412          | 10,183         |
| <b>South America</b>         |                             |                |                |                |                |                |
| Brazil                       | 950                         | 1,225          | 1,000          | 1,200          | 1,240          | 1,265          |
| Chile                        | 912                         | 950            | 975            | 940            | 975            | 935            |
| Total                        | 1,862                       | 2,175          | 1,975          | 2,140          | 2,215          | 2,200          |
| <b>Western Mediterranean</b> |                             |                |                |                |                |                |
| Italy                        | 3,520                       | 4,372          | 4,900          | 4,810          | 4,690          | 4,700          |
| Greece                       | 1,245                       | 1,325          | 1,350          | 1,150          | 970            | 880            |
| Spain                        | 981                         | 1,336          | 1,687          | 1,381          | 1,463          | 1,450          |
| Portugal                     | 772                         | 988            | 997            | 855            | 917            | 972            |
| France                       | 286                         | 327            | 363            | 324            | 298            | 297            |
| Total                        | 6,804                       | 8,348          | 9,297          | 8,520          | 8,338          | 8,299          |
| <b>Eastern Mediterranean</b> |                             |                |                |                |                |                |
| Turkey                       | 1,080                       | 2,050          | 2,050          | 1,700          | 1,300          | 1,450          |
| Israel                       | 176                         | 267            | 267            | 223            | 146            | 165            |
| Total                        | 1,256                       | 2,317          | 2,317          | 1,923          | 1,446          | 1,615          |
| <b>Total Mediterranean</b>   | <b>8,060</b>                | <b>10,665</b>  | <b>11,614</b>  | <b>10,443</b>  | <b>9,784</b>   | <b>9,914</b>   |
| <b>Grand Total</b>           | <b>19,269</b>               | <b>21,653</b>  | <b>25,195</b>  | <b>22,546</b>  | <b>20,411</b>  | <b>22,297</b>  |

Source: Horticultural and Tropical Products Division, FAS, USDA

1/ based on contracts

F= forecast based on contract intentions

**Table 2: Canned Tomatoes 1/  
Production, Supply, and Distribution in Selected Countries**

| <b>Marketing<br/>Year 2/</b> | <b>Beginning<br/>Stocks</b> | <b>Production</b> | <b>Imports</b> | <b>Supply<br/>Distribution</b> | <b>Exports</b> | <b>Domestic<br/>Consumption</b> | <b>Ending<br/>Stocks</b> |
|------------------------------|-----------------------------|-------------------|----------------|--------------------------------|----------------|---------------------------------|--------------------------|
| <b>Brazil</b>                |                             |                   |                |                                |                |                                 |                          |
| 2000/2001                    | 855                         | 2,300             | 6,000          | 9,155                          | 195            | 8,600                           | 360                      |
| 2001/2002                    | 360                         | 2,600             | 6,200          | 9,160                          | 200            | 8,750                           | 210                      |
| 2002/2003 F                  | 210                         | 2,800             | 6,200          | 9,210                          | 200            | 8,800                           | 210                      |
| <b>Chile</b>                 |                             |                   |                |                                |                |                                 |                          |
| 2000/2001                    | 74                          | 6,000             | 0              | 6,074                          | 1,972          | 3,300                           | 802                      |
| 2001/2002                    | 802                         | 5,900             | 0              | 6,702                          | 2,850          | 3,400                           | 452                      |
| 2002/2003 F                  | 452                         | 4,400             | 0              | 4,852                          | 1,275          | 3,400                           | 177                      |
| <b>France</b>                |                             |                   |                |                                |                |                                 |                          |
| 2000/2001                    | 9,719                       | 16,030            | 88,629         | 114,378                        | 5,894          | 100,000                         | 8,484                    |
| 2001/2002                    | 8,484                       | 5,900             | 95,000         | 109,384                        | 5,500          | 95,884                          | 8,000                    |
| 2002/2003 F                  | 8,000                       | 5,900             | 95,000         | 108,900                        | 5,500          | 95,400                          | 8,000                    |
| <b>Greece</b>                |                             |                   |                |                                |                |                                 |                          |
| 2000/2001                    | 1,799                       | 36,900            | 14,000         | 52,699                         | 18,000         | 32,500                          | 2,199                    |
| 2001/2002                    | 2,199                       | 31,356            | 19,000         | 52,555                         | 14,500         | 32,500                          | 5,555                    |
| 2002/2003 F                  | 5,555                       | 28,400            | 16,000         | 49,955                         | 14,000         | 32,750                          | 3,205                    |
| <b>Israel</b>                |                             |                   |                |                                |                |                                 |                          |
| 2000/2001                    | 8,105                       | 18,046            | 260            | 26,411                         | 11,800         | 8,600                           | 6,011                    |
| 2001/2002                    | 6,011                       | 11,100            | 0              | 17,111                         | 7,000          | 8,100                           | 2,011                    |
| 2002/2003 F                  | 2,011                       | 13,365            | 250            | 15,626                         | 7,500          | 7,500                           | 626                      |
| <b>Italy</b>                 |                             |                   |                |                                |                |                                 |                          |
| 2000/2001                    | 417,000                     | 1,888,000         | 12,000         | 2,317,000                      | 900,000        | 900,000                         | 517,000                  |
| 2001/2002                    | 517,000                     | 1,780,000         | 10,000         | 2,307,000                      | 920,000        | 920,000                         | 467,000                  |
| 2002/2003 F                  | 467,000                     | 1,750,000         | 10,000         | 2,227,000                      | 940,000        | 930,000                         | 357,000                  |
| <b>Spain</b>                 |                             |                   |                |                                |                |                                 |                          |
| 2000/2001                    | 20,000                      | 195,623           | 2,817          | 218,440                        | 54,548         | 158,000                         | 5,892                    |
| 2001/2002                    | 5,892                       | 195,400           | 1,063          | 202,355                        | 40,866         | 155,000                         | 6,489                    |
| 2002/2003 F                  | 6,489                       | 195,833           | 1,000          | 203,322                        | 42,000         | 156,322                         | 5,000                    |
| <b>Total</b>                 |                             |                   |                |                                |                |                                 |                          |
| 2000/2001                    | 457,552                     | 2,162,899         | 123,706        | 2,744,157                      | 992,409        | 1,211,000                       | 540,748                  |
| 2001/2002                    | 540,748                     | 2,032,256         | 131,263        | 2,704,267                      | 990,916        | 1,223,634                       | 489,717                  |
| 2002/2003 F                  | 489,717                     | 2,000,698         | 128,450        | 2,618,865                      | 1,010,475      | 1,234,172                       | 374,218                  |

Source: U.S. Agricultural Attaché Reports, FAS/USDA

1/ Includes whole peeled, and/or wedged, diced, crushed, and other non-concentrated products

2/ Marketing years are July-June with the exception of France's, which is August-July, and Brazil's is May-April.

F = Forecast

**Table 3: Tomato Paste  
Production, Supply, and Distribution in Selected Countries**

| <b>Marketing<br/>Year 1/</b> | <b>Beginning<br/>Stocks</b> | <b>Production</b> | <b>Imports</b> | <b>Supply<br/>Distribution</b> | <b>Exports</b> | <b>Domestic<br/>Consumption</b> | <b>Ending<br/>Stocks</b> |
|------------------------------|-----------------------------|-------------------|----------------|--------------------------------|----------------|---------------------------------|--------------------------|
| <b>Brazil</b>                |                             |                   |                |                                |                |                                 |                          |
| 2000/2001                    | 17,449                      | 110,000           | 500            | 127,949                        | 1,000          | 125,350                         | 1,599                    |
| 2001/2002                    | 1,599                       | 130,000           | 400            | 131,999                        | 1,000          | 126,500                         | 4,499                    |
| 2002/2003 F                  | 4,499                       | 130,000           | 400            | 134,899                        | 1,000          | 127,500                         | 6,399                    |
| <b>Chile</b>                 |                             |                   |                |                                |                |                                 |                          |
| 2000/2001                    | 1,363                       | 110,000           | 0              | 111,363                        | 87,584         | 11,680                          | 12,099                   |
| 2001/2002                    | 12,099                      | 111,000           | 0              | 123,099                        | 109,009        | 11,680                          | 2,410                    |
| 2002/2003 F                  | 2,410                       | 102,000           | 0              | 104,410                        | 90,000         | 11,710                          | 2,700                    |
| <b>France</b>                |                             |                   |                |                                |                |                                 |                          |
| 2000/2001                    | 38,644                      | 43,100            | 84,177         | 165,921                        | 5,992          | 99,929                          | 60,000                   |
| 2001/2002                    | 60,000                      | 42,200            | 70,000         | 172,200                        | 6,000          | 100,000                         | 66,200                   |
| 2002/2003 F                  | 66,200                      | 42,200            | 70,000         | 178,400                        | 6,000          | 105,000                         | 67,400                   |
| <b>Greece</b>                |                             |                   |                |                                |                |                                 |                          |
| 2000/2001                    | 43,000                      | 180,000           | 3,500          | 226,500                        | 190,000        | 15,500                          | 21,000                   |
| 2001/2002                    | 21,000                      | 145,000           | 12,000         | 178,000                        | 135,000        | 17,500                          | 25,500                   |
| 2002/2003 F                  | 25,500                      | 134,000           | 14,000         | 173,500                        | 135,000        | 17,500                          | 21,000                   |
| <b>Israel</b>                |                             |                   |                |                                |                |                                 |                          |
| 2000/2001                    | 9,420                       | 26,290            | 0              | 35,710                         | 16,353         | 14,200                          | 5,157                    |
| 2001/2002                    | 5,157                       | 16,560            | 0              | 21,717                         | 6,000          | 12,500                          | 3,217                    |
| 2002/2003 F                  | 3,217                       | 18,975            | 500            | 22,692                         | 7,000          | 12,500                          | 3,192                    |
| <b>Italy</b>                 |                             |                   |                |                                |                |                                 |                          |
| 2000/2001                    | 160,000                     | 340,000           | 65,000         | 565,000                        | 350,000        | 74,000                          | 141,000                  |
| 2001/2002                    | 141,000                     | 330,000           | 70,000         | 541,000                        | 370,000        | 74,000                          | 97,000                   |
| 2002/2003 F                  | 97,000                      | 328,000           | 73,000         | 498,000                        | 380,000        | 74,000                          | 44,000                   |
| <b>Mexico</b>                |                             |                   |                |                                |                |                                 |                          |
| 2000/2001                    | 0                           | 21,000            | 17,183         | 38,183                         | 7,176          | 31,007                          | 0                        |
| 2001/2002                    | 0                           | 14,000            | 22,000         | 36,000                         | 5,000          | 31,000                          | 0                        |
| 2002/2003 F                  | 0                           | 11,000            | 24,000         | 35,000                         | 4,000          | 31,000                          | 0                        |
| <b>Portugal</b>              |                             |                   |                |                                |                |                                 |                          |
| 2000/2001                    | 27,650                      | 155,955           | 0              | 183,605                        | 124,383        | 39,222                          | 20,000                   |
| 2001/2002                    | 20,000                      | 158,387           | 0              | 178,387                        | 64,781         | 100,106                         | 13,500                   |
| 2002/2003 F                  | 13,500                      | 155,000           | 0              | 168,500                        | 125,000        | 38,500                          | 5,000                    |
| <b>Spain</b>                 |                             |                   |                |                                |                |                                 |                          |
| 2000/2001                    | 20,900                      | 169,718           | 15,058         | 205,676                        | 75,967         | 126,000                         | 3,709                    |
| 2001/2002                    | 3,709                       | 225,849           | 13,715         | 243,273                        | 64,818         | 140,000                         | 38,455                   |
| 2002/2003 F                  | 38,455                      | 205,357           | 10,000         | 253,812                        | 70,000         | 150,000                         | 33,812                   |
| <b>Turkey</b>                |                             |                   |                |                                |                |                                 |                          |
| 2000/2001                    | 25,035                      | 265,000           | 0              | 290,035                        | 134,914        | 117,000                         | 38,121                   |
| 2001/2002                    | 38,121                      | 170,000           | 0              | 208,121                        | 100,000        | 105,000                         | 3,121                    |
| 2002/2003 F                  | 3,121                       | 220,000           | 0              | 223,121                        | 110,000        | 107,500                         | 5,621                    |
| <b>Total</b>                 |                             |                   |                |                                |                |                                 |                          |
| 2000/2001                    | 343,461                     | 1,421,063         | 185,418        | 1,949,942                      | 993,369        | 653,888                         | 302,685                  |
| 2001/2002                    | 302,685                     | 1,342,996         | 188,115        | 1,833,796                      | 861,608        | 718,286                         | 253,902                  |
| 2002/2003 F                  | 253,902                     | 1,346,532         | 191,900        | 1,792,334                      | 928,000        | 675,210                         | 189,124                  |

Source: U.S. Agricultural Attaché Reports, FAS/USDA

1/ Marketing year July-June with the exception of France (August-July), Brazil (May-April), Mexico (March-February), and Turkey (September-August). 2/ 28-30 Percent Basis. F=Forecast.

**Table 4: United States Exports  
Canned Tomatoes, Ketchup, Tomato Paste, Sauce 1/**

| <b>Commodity/<br/>Destination</b> | <b>1997/98</b> | <b>1998/99</b> | <b>1999/00</b> | <b>2000/01</b> | <b>July-March<br/>2000/01</b> | <b>July-March<br/>2001/02</b> |
|-----------------------------------|----------------|----------------|----------------|----------------|-------------------------------|-------------------------------|
| <b>Metric Tons</b>                |                |                |                |                |                               |                               |
| <b>Canned Tomatoes</b>            |                |                |                |                |                               |                               |
| Canada                            | 24,320         | 20,736         | 28,052         | 30,661         | 24,408                        | 21,747                        |
| Japan                             | 1,947          | 13,055         | 10,916         | 2,400          | 1,857                         | 1,354                         |
| Korea; Republic of                | 382            | 1,430          | 776            | 777            | 580                           | 776                           |
| Mexico                            | 6,293          | 954            | 1,512          | 3,429          | 2,520                         | 2,240                         |
| Australia                         | 257            | 516            | 124            | 90             | 69                            | 16                            |
| Other                             | 4,398          | 2,587          | 4,565          | 9,852          | 6,595                         | 13,368                        |
| <i>Total</i>                      | <i>37,597</i>  | <i>39,278</i>  | <i>45,945</i>  | <i>47,209</i>  | <i>36,029</i>                 | <i>39,501</i>                 |
| <b>Ketchup</b>                    |                |                |                |                |                               |                               |
| Japan                             | 9,390          | 8,861          | 6,283          | 5,996          | 4,536                         | 3,696                         |
| Canada                            | 6,771          | 5,148          | 5,879          | 8,405          | 5,890                         | 6,473                         |
| Mexico                            | 4,223          | 4,201          | 7,186          | 7,129          | 5,692                         | 4,909                         |
| Brazil                            | 417            | 4,035          | 939            | 71             | 71                            | 171                           |
| Hong Kong                         | 3,458          | 3,474          | 3,567          | 2,475          | 1,791                         | 3,855                         |
| Israel                            | 1,371          | 2,171          | 1,295          | 2,020          | 1,271                         | 1,811                         |
| United Kingdom                    | 334            | 1,725          | 1,651          | 286            | 135                           | 910                           |
| Netherlands Antilles              | 649            | 969            | 597            | 502            | 356                           | 449                           |
| Saudi Arabia                      | 1,240          | 923            | 1,156          | 1,015          | 873                           | 313                           |
| Other                             | 12,455         | 13,102         | 9,670          | 9,224          | 6,386                         | 8,613                         |
| <i>Total</i>                      | <i>40,308</i>  | <i>44,609</i>  | <i>38,223</i>  | <i>37,123</i>  | <i>27,001</i>                 | <i>31,200</i>                 |
| <b>Tomato Paste</b>               |                |                |                |                |                               |                               |
| Canada                            | 46,171         | 41,556         | 46,097         | 47,731         | 37,169                        | 36,273                        |
| Japan                             | 14,358         | 7,455          | 10,274         | 16,748         | 11,168                        | 9,907                         |
| Dominican Republic                | 116            | 6,891          | 77             | 900            | 329                           | 1,186                         |
| Korea; Republic of                | 10,634         | 5,472          | 6,465          | 7,989          | 6,274                         | 4,716                         |
| Philippines                       | 5,804          | 4,623          | 4,288          | 508            | 356                           | 1,844                         |
| Mexico                            | 5,307          | 3,768          | 7,188          | 12,670         | 9,127                         | 8,729                         |
| Taiwan                            | 1,839          | 2,058          | 1,819          | 823            | 354                           | 53                            |
| Hong Kong                         | 1,313          | 1,428          | 1,061          | 1,466          | 1,202                         | 1,652                         |
| Haiti                             | 3,247          | 1,183          | 2,097          | 536            | 304                           | 1,295                         |
| Other                             | 47,036         | 3,353          | 10,458         | 8,278          | 6,744                         | 2,673                         |
| <i>Total</i>                      | <i>135,825</i> | <i>77,787</i>  | <i>89,824</i>  | <i>97,649</i>  | <i>73,027</i>                 | <i>68,328</i>                 |
| <b>Tomato Sauce</b>               |                |                |                |                |                               |                               |
| Canada                            | 63,686         | 71,206         | 69,465         | 66,642         | 47,496                        | 51,090                        |
| Mexico                            | 5,757          | 6,303          | 6,287          | 10,640         | 7,570                         | 10,053                        |
| Japan                             | 4,265          | 3,278          | 3,839          | 6,078          | 4,996                         | 2,107                         |
| Saudi Arabia                      | 1,441          | 1,917          | 806            | 1,304          | 1,067                         | 828                           |
| Korea; Republic of                | 1,840          | 1,734          | 2,617          | 1,765          | 1,371                         | 1,524                         |
| United Kingdom                    | 1,586          | 1,489          | 3,711          | 4,345          | 3,206                         | 2,516                         |
| Netherlands                       | 1,250          | 1,201          | 1,525          | 1,266          | 1,090                         | 437                           |
| Sweden                            | 1,324          | 1,015          | 1,409          | 1,341          | 1,104                         | 1,073                         |
| Other                             | 11,122         | 10,209         | 16,576         | 18,956         | 14,285                        | 11,811                        |
| <i>Total</i>                      | <i>92,271</i>  | <i>98,352</i>  | <i>106,235</i> | <i>112,337</i> | <i>82,185</i>                 | <i>81,439</i>                 |

1/ Marketing year (July-June). Source: U.S. Census Bureau

**Table 5: United States Imports  
Canned Tomatoes, Ketchup, Tomato Paste, Sauce 1/**

| Commodity/<br>Destination |               |               |               |               | July-March    | July-March    |
|---------------------------|---------------|---------------|---------------|---------------|---------------|---------------|
|                           | 1997/98       | 1998/99       | 1999/00       | 2000/01       | 2000/01       | 2001/02       |
| <b>Metric Tons</b>        |               |               |               |               |               |               |
| <b>Canned Tomatoes</b>    |               |               |               |               |               |               |
| Italy                     | 47,352        | 39,028        | 2,003         | 371           | 332           | 155           |
| Israel                    | 6,461         | 10,464        | 5,611         | 1,178         | 827           | 3,074         |
| Canada                    | 5,880         | 9,870         | 2,747         | 2,767         | 2,110         | 4,371         |
| Spain                     | 5,762         | 5,482         | 2,243         | 1,036         | 591           | 1,383         |
| Chile                     | 2,394         | 2,841         | 462           | 688           | 353           | 402           |
| Turkey                    | 402           | 139           | 322           | 40            | 38            | 16            |
| Other                     | 191           | 338           | 800           | 1,734         | 594           | 488           |
| <i>Total</i>              | <i>68,442</i> | <i>68,162</i> | <i>14,188</i> | <i>7,814</i>  | <i>4,845</i>  | <i>9,889</i>  |
| <b>Ketchup</b>            |               |               |               |               |               |               |
| Canada                    | 31,786        | 38,747        | 37,871        | 39,207        | 30,874        | 43,348        |
| China                     | 0             | 222           | 380           | 402           | 289           | 1,846         |
| Hong Kong                 | 0             | 45            | 0             | 9             | 0             | 30            |
| India                     | 17            | 16            | 13            | 31            | 16            | 47            |
| Japan                     | 0             | 16            | 0             | 0             | 0             | 0             |
| Other                     | 11            | 18            | 50            | 78            | 66            | 102           |
| <i>Total</i>              | <i>31,814</i> | <i>39,064</i> | <i>38,314</i> | <i>39,727</i> | <i>31,245</i> | <i>45,373</i> |
| <b>Tomato Paste</b>       |               |               |               |               |               |               |
| Chile                     | 491           | 27,302        | 2,348         | 669           | 371           | 1,407         |
| Mexico                    | 8,350         | 22,815        | 6,884         | 3,508         | 313           | 0             |
| Peru                      | 0             | 5,948         | 1,238         | 795           | 755           | 354           |
| Israel                    | 1,118         | 4,722         | 6,735         | 2,215         | 1,933         | 1,704         |
| Italy                     | 425           | 4,659         | 175           | 729           | 670           | 556           |
| China                     | 0             | 4,265         | 3,363         | 6,283         | 1,737         | 4,166         |
| Canada                    | 149           | 1,635         | 97            | 14            | 0             | 112           |
| Portugal                  | 8             | 1,295         | 0             | 0             | 0             | 0             |
| Turkey                    | 63            | 1,282         | 324           | 342           | 290           | 442           |
| Other                     | 100           | 2,111         | 60            | 287           | 244           | 447           |
| <i>Total</i>              | <i>10,705</i> | <i>76,034</i> | <i>21,224</i> | <i>14,842</i> | <i>6,313</i>  | <i>9,188</i>  |
| <b>Tomato Sauce</b>       |               |               |               |               |               |               |
| Canada                    | 5,385         | 5,638         | 6,036         | 7,741         | 6,769         | 5,492         |
| France                    | 0             | 3,016         | 0             | 0             | 0             | 7             |
| Portugal                  | 6             | 1,108         | 0             | 2             | 2             | 0             |
| Dominican Republic        | 1,266         | 902           | 1,848         | 3,194         | 1,002         | 6,579         |
| Italy                     | 821           | 674           | 1,087         | 1,715         | 1,318         | 1,303         |
| Mexico                    | 69            | 559           | 3,210         | 2,916         | 1,824         | 2,321         |
| Other                     | 329           | 588           | 381           | 370           | 315           | 309           |
| <i>Total</i>              | <i>7,876</i>  | <i>12,485</i> | <i>12,562</i> | <i>15,938</i> | <i>11,230</i> | <i>16,011</i> |

1/ Marketing year (July-June). Source: U.S. Census Bureau

## **World Trade Situation and Policy Updates**

### **ITC Rules Imports of Chilean Frozen Raspberry Injure U.S. Industry**

On June 20, 2002, the U.S. International Trade Commission (ITC) issued a final determination that the U.S. raspberry industry has been materially injured by imports of individually quick frozen red raspberries (IQF) from Chile. This decision follows the Department of Commerce's final ruling in May that IQF red raspberries from Chile were being sold in the United States at less than fair market value. At that time, final antidumping duties on imported IQF raspberries ranged from 0.50 to 5.98 percent. The Department of Commerce will now instruct its Customs officials to assess the antidumping duties on all imports of this product from Chile. Since the ITC's preliminary affirmative injury ruling on the case last June, U.S. imports of IQF red raspberries from Chile through April were up 22 percent on a volume basis, and increased 12 percent on a value basis, compared to the same period in the preceding year.

### **Department of Commerce Ordered to Explain Method for Calculating Anti-dumping Duties on Chinese Apple Juice**

On June 18, the New York-based U.S. Court of International Trade ruled that the U.S. Department of Commerce must address the method used when calculating anti-dumping duties imposed on Chinese not-frozen apple juice concentrate (AJC) in 2000. The ruling came more than two years after China's apple juice producers filed an appeal on the dumping decision with the U.S. Court of International Trade. The Chinese producers appealed the Commerce Department's use of India as a surrogate country, among other factors, to determine the cost of production of AJC in China. Because China is not a free market economy, Commerce was allowed to use India as a substitute country. The Commerce Department has 90 days from the ruling to address the issues outlined in the Court's decision. The anti-dumping duties, ranging from about 9 percent to 52 percent, will remain in effect during this period. On May 15, 2000, the U.S. International Trade Commission issued a final determination that the U.S. apple juice industry was materially injured by imports of AJC from China. Commerce instructed U.S. Customs officials to assess the antidumping duties on all imports of Chinese non-frozen apple juice concentrate (including semi-frozen or chilled). The dumping duties are to be in effect for five years.

### **Argentina's Apple and Pear Exports Running at Record Pace**

Boosted by the devaluation of the Argentine peso, combined shipments of Argentine apples and pears have exceeded 400,000 tons in the first five months (January-May) of the 2002 season, up 15 percent from the same period last year. The sharp devaluation of Argentina's peso has helped exports and improved peso returns to the main apple and pear growing regions of the Rio Negro and Neuquen. However, in U.S. dollars, returns to shipments are down 8 per cent from last season, due to the weakness of the Argentine peso vis-à-vis the U.S. dollar. Reportedly, the Argentine peso has fallen 270 percent in value against the U.S. dollar since January 2002. Argentina plays a major role in world apple and pear exports. In 2001, Argentine pear exports reached about 315,000 tons, valued at \$165 million. Shipments of apples during the same year totaled nearly 200,000 tons, valued at \$97 million. The lower-priced fruit from Argentina,

however, is not expected to adversely affect U.S. fruit shipments this season. Although marketed year round, the bulk of Argentina's fresh apples and pears are exported in the months of February through April. Major export markets for Argentina's fruits are Brazil, the EU, particularly Italy, and the United States.

### **Outlook Positive for U.S. Apple and Pear Shipments to Cuba**

After several days of meetings and site visits to packing houses and orchards in Washington state and New York, U.S. apples and pears may soon find their way to Cuba, ending a 40-year absence. On June 16, 2002, representatives from APHIS and Cuba's Centro Nacional Sanidad Vegetal (CNSV) signed a document that details the phytosanitary requirements for the exportation of Washington State apples and pears to Cuba. Likewise, New York apple growers received phytosanitary clearance on June 19. New York and Washington are the only states that now have clearance to ship apples to Cuba. Shipments from both states will require a Federal Phytosanitary Certificate (PC), along with an additional declaration indicating that they are free of certain pests, such as *Rhagoletis pomonella* (apple maggot). In the near term, potential sales of apples to Cuba could total \$500,000 annually. The first export sale, which will be made on a cash basis, is expected to take place in the summer of 2002.

### **Potential New Market Opportunities for U.S. Fruits in Colombia**

Representatives from the Washington Apple Commission (WAC) reported on June 14 that Colombia has banned fruit from Chile until at least September 2002. The ban was imposed after Colombian Customs officials at the port of Buenaventura detected *Cydia pomonella* (Codling moth) in four shipments of Chilean fruit. The ban on Chile could likely bring new market opportunities for U.S. fruit exports to Colombia. In August 2001, Colombian inspectors are tentatively scheduled to participate in an apple tour in the Pacific Northwest and Michigan to perform technical inspections of field orchards and laboratories. In calendar year 2001, Chile's fruit shipments to Colombia were valued at \$37 million. Colombia was Chile's seventh largest fruit market in 2001, accounting for about 3 percent of its exports. The leading Chilean fruits exported in 2001 to Colombia included table grapes, apples, and pears. Meanwhile, U.S. fruit exports, primarily apples, to Colombia reached \$7 million in 2001.

### **Mexican Tomato Growers Withdraw from the Suspension Agreement on Imports of Fresh Tomatoes**

On May 31, 2002, the Confederation of the Agricultural Associations of Sinaloa (CAADES), a Mexican tomato grower's organization, sent a letter to the Department of Commerce (DOC), announcing its decision to withdraw from the agreement established in 1996 suspending the anti-dumping investigation into fresh tomatoes from Mexico, effective July 30, 2002. With this decision, the DOC will reactivate the anti-dumping investigation from the time of the preliminary determination, originally published on November 1, 1996. Customs will require deposits based on the preliminary anti-dumping margins ranging from 4.16 percent to 188.45 percent. This unexpected announcement came as the DOC was in the midst of a "sunset review" of the agreement to determine whether it should be continued. The review began last October and was expected to be completed by October 2002. The original suspension agreement, which



ran from November 1, 1996, through November 1, 2001, established a reference price of \$0.172 per pound (equivalent to \$4.30 for a 25-pound box) for the July 1 to October 23 period; and \$0.2108 per pound (equivalent to \$5.27 per pound box) for the October 22 to June 30 period).

### **Canadian Tribunal Rules No Injury in Dumping Case Against Fresh Tomatoes from the United States**

On June 26, the Canadian International Trade Tribunal (CITT) issued its finding that the dumping of fresh tomatoes from the United States has not caused material injury and is not threatening to cause material injury to the domestic industry. This negative determination brings this case to a close. On June 24, the Canadian Customs and Revenue Agency (CCRA) had confirmed that fresh tomatoes from the United States, excluding tomatoes for processing, were dumped into Canada at, on average, 33 percent below normal price levels. A U.S. dumping investigation against Canadian greenhouse tomatoes was effectively terminated on April 2, when the U.S. International Trade Commission (ITC) issued a final negative injury determination in the case. Two-way tomato trade remains critical to both industries' stability and long-term health. According to Census Bureau data, U.S. exports of tomatoes to Canada in CY 2001 were valued at \$115 million, while U.S. imports of tomatoes from Canada in that same year reached \$167 million.

## **Export News and Opportunities**

Every U.S. exporter wants to get paid. However, credit can make or break a deal. It can shift the advantage to you or to your competitor. That's why many exporters turn to the U.S. Department of Agriculture's (USDA) Export Credit Guarantee Programs. With USDA's guarantee behind the credit, you can arrange competitive financing with less risk. Your buyers may benefit too, from longer terms and lower rates. In FY 2002, USDA has made available over \$5 billion in credit guarantees to facilitate sales to selected developing countries, Western Europe, Japan, Hong Kong, and Taiwan. Invest the time to learn more about the Export Credit Guarantee Programs, (GSM-102) and Supplier Credit Guarantee Program (SCGP), to increase your sales and lower your risks. Use GSM and SCGP to avoid possible importer and foreign bank defaults on payments and ensure that American farm and food products continue to move to markets around the world. While USDA does not provide financing, it guarantees payments due to U.S. exporters in case the foreign banks' or importers' default.

You may learn more about GSM-102 and SCGP regulations, country specific press releases and program announcements, and a Monthly Summary of Export Credit Guarantee Program Activity on the Internet at:

**<http://www.fas.usda.gov/export.html>**

### **GSM-102**

On June 20, USDA amended the Nigeria GSM-102 program for fiscal year 2002. The amendment changes the credit terms from 90 days to credit terms up to 180 days on applications received for guarantee coverage on or after the date of this program announcement. The total FY 2002 allocation for coverage to Nigeria under the GSM-102 program remains unchanged at \$10 million. The previous FAS announcement pertinent to this allocation is PR 0463-01.

On June 20, USDA increased the Caribbean Region GSM-102 program allocation from \$220 million to \$350 million. All other terms and conditions as previously announced remain the same. The FAS announcements pertinent to this allocation are PR 0275-01 and PR 0038-02.

Also on June 20, USDA increased the Central America GSM-102 program allocation from \$250 million to \$400 million. All other terms and conditions as previously announced remain the same. The FAS announcement pertinent to this allocation is PR 0290-01.

Exporters may apply for credit guarantees on a first-come, first-served basis to cover sales of eligible commodities to the aforementioned markets.

The GSM-102 program makes available credit guarantees for sales of U.S. agricultural commodities overseas. USDA does not provide financing, but guarantees payments due from foreign banks. USDA typically guarantees 98 percent of the principal and a portion of the interest. The GSM-102 program covers credit terms from 90 days to 3 years.

Under the program, once a firm sale exists, the qualified U.S. exporter applies for a payment guarantee before the date of export. The U.S. exporter pays a fee calculated on the dollar amount guaranteed, based on a schedule of rates applicable to different lengths of credit periods. The CCC-approved foreign bank issues a dollar-denominated, irrevocable letter of credit in favor of the U.S. exporter, ordinarily advised or confirmed by the financial institution in the United States agreeing to extend credit to the foreign bank. The U.S. exporter may negotiate an arrangement to be paid as exports occur by assigning the U.S. financial institution the right to proceeds that may become payable under the guarantee, and later presenting required documents to that financial institution. Such documents normally include a copy of the export report. If a foreign bank fails to make any payment as agreed, the exporter or the assignee may file a claim with USDA for the amount due and covered by the guarantee. USDA will pay the U.S. bank and will take on the responsibility of collecting the overdue amount from the foreign bank.

### **Supplier Credit Guarantee Program**

The SCGP is unique because it covers short-term financing extended directly by U.S. exporters to foreign buyers and requires that the importers sign a promissory note in case of default on the CCC-backed payment guarantee. The SCGP emphasizes high-value and value-added products, but may include commodities or products that also have been programmed under the GSM-102 program.

The SCGP encourages exports to buyers in countries where credit is necessary to maintain or increase U.S. sales but where financing may not be available without CCC guarantees. Under the SCGP, CCC guarantees a portion of payments due from importers under short-term financing (up to 180 days) that exporters have extended directly to the importers for the purchase of U.S. agricultural commodities and products. These direct credits must be secured by promissory notes signed by the importers. CCC does not provide financing but guarantees payment due from the importer.

### **GSM-102 and SCGP**

The following tables present the FY 2002 GSM-102 and SCGP for which USDA has allocated credit guarantees for sales of U.S. horticultural products. The table also includes horticultural sales (exporter applications received) that have been registered under GSM-102 and SCGP. For most countries and regions, exporters may apply for credit guarantees on a first-come-first-served basis to cover sales of any of the eligible commodities published in FAS program announcement PR 0096-01, issued March 20, 2001 or as superseded. The following horticultural products are eligible under the export credit guarantee programs: dried fruit; fresh fruit; frozen fruit; canned fruit; 100-percent fruit juices; fruit and vegetable concentrates, pastes, pulps and purees; honey; hops or hops extract; beer; tree nuts; fresh vegetables; canned vegetables; dried vegetables; wine; and brandy. The General Sales Manager will consider requests to establish an SCGP and/or GSM Program for a country or region or amend an authorized program to include horticultural commodities and products that are currently not eligible.

*(For further information on the SCGP or GSM-102 Program for horticultural commodities, contact Yvette Wedderburn Bomersheim on 202-720-0911).*

## FY 2002 SCGP COVERAGE

| Country                  | Commodity                      | Announced Allocations               | Exporter Applications Received | Balance |
|--------------------------|--------------------------------|-------------------------------------|--------------------------------|---------|
|                          |                                | --coverage in millions of dollars-- |                                |         |
| Algeria                  |                                | 10.00                               | 0.00                           | 10.00   |
| Azerbaijan               |                                | 5.00                                | 0.00                           | 5.00    |
| Baltic Region            |                                | 20.00                               | 0.64                           | 19.36   |
| Caribbean Region         |                                | 10.00                               | 1.55                           | 8.45    |
|                          | Wine (180)                     |                                     | 0.02                           |         |
| Central America Region   |                                | 50.00                               | 23.93                          | 26.07   |
|                          | Fruit, Fresh (180)             |                                     | 0.20                           |         |
| Central Europe Region    |                                | 20.00                               | 0.00                           | 20.00   |
| China/Hong Kong Region   |                                | 50.00                               | 0.10                           | 49.90   |
|                          | Wine (180)                     |                                     | 0.01                           |         |
| Egypt                    |                                | 20.00                               | 8.60                           | 11.40   |
| India                    |                                | 25.00                               | 0.00                           | 25.00   |
| Israel                   |                                | 20.00                               | 0.04                           | 19.96   |
| Japan                    |                                | 50.00                               | 0.00                           | 50.00   |
| Kazakhstan               |                                | 15.00                               | 2.00                           | 13.00   |
| Kenya                    |                                | 2.00                                | 0.00                           | 2.00    |
| Korea                    |                                | 50.00                               | 8.44                           | 41.56   |
|                          | Fruit, Canned (180)            |                                     | 0.19                           |         |
|                          | Fruit, Fresh (180)             |                                     | 8.20                           |         |
|                          | Wine (180)                     |                                     | 0.05                           |         |
| Mexico                   |                                | 200.00                              | 135.74                         | 64.26   |
|                          | Fruit, Fresh (180)             |                                     | 0.03                           |         |
|                          | Wine (180)                     |                                     | 0.04                           |         |
| Pakistan                 |                                | 10.00                               | 0.00                           | 10.00   |
| Poland                   |                                | 10.00                               | 0.05                           | 9.95    |
| Russia                   |                                | 20.00                               | 1.81                           | 18.19   |
|                          | Fruit, Fresh (180)             |                                     | 0.01                           |         |
| South Africa             |                                | 10.00                               | 0.00                           | 10.00   |
| South America Region     |                                | 20.00                               | 1.33                           | 18.67   |
| Southeast Asia Region    |                                | 150.00                              | 54.98                          | 95.02   |
|                          | Fruit, Fresh (180)             |                                     | 0.20                           |         |
|                          | Fruit Juice (180)              |                                     | 0.01                           |         |
|                          | Fruit Juice Concentrates (180) |                                     | 0.01                           |         |
|                          | Wine (180)                     |                                     | 0.02                           |         |
| Southeast Balkans Region |                                | 75.00                               | 0.57                           | 74.43   |
| Southeast Europe Region  |                                | 20.00                               | 0.00                           | 20.00   |
| Sri Lanka                |                                | 10.00                               | 0.00                           | 10.00   |
| Taiwan                   |                                | 50.00                               | 0.01                           | 49.99   |
|                          | Wine (180)                     |                                     | 0.01                           |         |
| Turkey                   |                                | 10.00                               | 0.80                           | 9.20    |
| West Africa Region       |                                | 35.00                               | 5.91                           | 29.09   |
| Western Europe Region    |                                | 50.00                               | 1.01                           | 48.99   |
|                          | Wine (180)                     |                                     | 0.12                           |         |
| Yemen                    |                                | 10.00                               | 0.00                           | 10.00   |

### FY 2002 GSM-102 COVERAGE

| Country                    | Announced<br>Allocations<br>--coverage in millions of dollars-- |
|----------------------------|---|
| Algeria                    | 150.00  |
| Azerbaijan                 | 5.00  |
| Baltic Region              | 15.00   |
| Bulgaria                   | 7.00  |
| Caribbean Region           | 220.00  |
| Central America Region     | 250.00  |
| Central Europe Region      | 10.00   |
| China/Hong Kong Region     | 300.00  |
| Dominican Republic         | 25.00   |
| East Africa                | 5.00  |
| Egypt                      | 100.00  |
| India                      | 25.00   |
| Jordan                     | 40.00   |
| Kazakhstan                 | 10.00   |
| Korea                      | 850.00  |
| Lebanon                    | 10.00   |
| Malaysia                   | 30.00   |
| Mexico                     | 500.00  |
| Morocco                    | 10.00   |
| Nigeria                    | 10.00   |
| Philippines                | 100.00  |
| Poland                     | 25.00   |
| Romania                    | 25.00   |
| Russia                     | 20.00   |
| South America Region       | 600.00  |
| Southeast Asia Region      | 190.00  |
| Southeast Europe<br>Region | 25.00   |
| Southern Africa Region     | 50.00   |
| Sri Lanka                  | 35.00   |
| Thailand                   | 100.00  |
| Tunisia                    | 30.00   |
| Turkey                     | 345.00  |
| West Africa Region         | 14.00   |

### Top United States Horticultural Product Exports By Value

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

| Commodity             | FY 1997           | FY 1998           | FY 1999           | FY 2000           | FY 2001           | Oct. - Apr.      | Oct. - Apr.      |
|-----------------------|-------------------|-------------------|-------------------|-------------------|-------------------|------------------|------------------|
|                       |                   |                   |                   |                   |                   | FY 2001          | FY 2002          |
| --- 1,000 Dollars --- |                   |                   |                   |                   |                   |                  |                  |
| Almonds               | 879,032           | 772,891           | 696,818           | 580,815           | 682,680           | 422,230          | 471,239          |
| Essential Oils        | 622,219           | 532,623           | 507,651           | 591,583           | 674,715           | 368,643          | 412,995          |
| Wine & Wine Prdts.    | 390,376           | 510,923           | 545,287           | 538,143           | 548,601           | 307,892          | 288,132          |
| Fresh Apples          | 412,855           | 328,068           | 375,869           | 336,444           | 414,227           | 287,995          | 249,036          |
| Fresh Grapes          | 313,836           | 274,953           | 283,865           | 332,162           | 390,322           | 202,823          | 199,283          |
| Frz. Potato Fries     | 294,417           | 313,209           | 343,216           | 339,553           | 359,945           | 212,061          | 198,651          |
| Oranges               | 308,055           | 339,114           | 159,585           | 268,808           | 304,406           | 230,463          | 201,238          |
| Orange Juice All      | 305,172           | 295,564           | 307,165           | 290,395           | 251,043           | 146,417          | 177,919          |
| Proc. Tomatoes        | 229,526           | 233,209           | 220,380           | 221,306           | 227,506           | 134,623          | 135,694          |
| Nursery Products      | 185,316           | 220,055           | 229,737           | 216,722           | 215,261           | 149,910          | 135,083          |
| Fresh Lettuce         | 146,640           | 173,746           | 157,262           | 180,099           | 201,531           | 126,154          | 143,990          |
| Grapefruit            | 240,408           | 189,744           | 221,443           | 208,329           | 200,273           | 178,795          | 181,527          |
| Beer                  | 341,784           | 280,088           | 211,861           | 177,241           | 199,782           | 98,485           | 90,867           |
| Potato Chips          | 145,468           | 226,987           | 257,355           | 243,824           | 182,895           | 117,006          | 96,603           |
| Walnuts               | 195,209           | 153,863           | 154,449           | 149,315           | 175,541           | 134,268          | 143,828          |
| Fresh Cherries        | 140,650           | 113,556           | 154,793           | 169,516           | 159,885           | 2,197            | 3,138            |
| Prunes                | 138,398           | 133,732           | 133,885           | 131,697           | 151,664           | 93,611           | 84,775           |
| Fresh Tomatoes        | 123,789           | 122,345           | 127,153           | 148,312           | 150,990           | 86,289           | 76,233           |
| Raisins               | 204,388           | 199,733           | 198,817           | 145,861           | 150,869           | 89,411           | 85,770           |
| Proc. Sweet Corn      | 167,490           | 139,068           | 148,050           | 146,591           | 120,893           | 76,419           | 75,658           |
| Total Other           | 4,838,913         | 4,765,679         | 4,864,543         | 5,121,136         | 5,296,828         | 2,993,258        | 3,017,108        |
| <b>GRAND TOTAL</b>    | <b>10,623,941</b> | <b>10,319,150</b> | <b>10,299,184</b> | <b>10,537,852</b> | <b>11,059,857</b> | <b>6,458,950</b> | <b>6,468,767</b> |

### Top United States Horticultural Product Exports By Volume

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

| Commodity          | FY 1997 | FY 1998 | FY 1999 | FY 2000 | FY 2001 | Oct. - Apr. | Oct. - Apr. |
|--------------------|---------|---------|---------|---------|---------|-------------|-------------|
|                    |         |         |         |         |         | FY 2001     | FY 2002     |
| Fresh Apples       | 690,595 | 539,685 | 664,969 | 571,860 | 742,377 | 524,479     | 422,699     |
| Oranges            | 569,739 | 609,433 | 247,419 | 490,867 | 541,338 | 407,192     | 324,860     |
| Frz. Potato Fries  | 396,738 | 438,425 | 468,826 | 469,287 | 505,641 | 299,233     | 282,515     |
| Orange Juice All   | 565,332 | 553,175 | 554,951 | 550,888 | 464,112 | 270,735     | 470,088     |
| Grapefruit         | 484,417 | 387,216 | 428,784 | 390,958 | 390,498 | 352,154     | 357,675     |
| Fresh Onions       | 265,859 | 292,328 | 257,089 | 333,775 | 357,427 | 243,872     | 197,598     |
| Fresh Lettuce      | 294,571 | 303,816 | 312,563 | 328,600 | 350,247 | 217,689     | 239,136     |
| Wine & Wine Prdts. | 208,786 | 266,294 | 274,696 | 281,475 | 311,924 | 174,614     | 156,098     |
| Fresh Grapes       | 236,400 | 214,569 | 221,158 | 272,901 | 303,583 | 153,140     | 147,311     |
| Beer               | 536,362 | 425,523 | 330,158 | 278,522 | 300,673 | 145,669     | 133,367     |
| Proc. Tomatoes     | 293,112 | 300,327 | 264,369 | 277,277 | 297,129 | 176,961     | 176,417     |
| Almonds            | 187,953 | 202,968 | 200,847 | 220,099 | 258,543 | 153,264     | 192,568     |
| Fresh Melons       | 219,695 | 211,310 | 247,448 | 250,860 | 234,887 | 52,905      | 47,322      |
| Fresh Tomatoes     | 153,657 | 133,687 | 148,271 | 181,892 | 173,470 | 89,219      | 86,682      |
| Pears              | 126,603 | 156,807 | 145,816 | 162,629 | 158,199 | 113,287     | 126,767     |
| Fresh Broccoli     | 130,999 | 126,791 | 154,514 | 182,848 | 157,465 | 86,330      | 84,047      |
| Proc. Sweet Corn   | 203,613 | 171,294 | 186,153 | 187,818 | 150,891 | 97,374      | 86,968      |
| Peaches            | 103,442 | 80,023  | 97,974  | 113,098 | 129,221 | 13,328      | 15,464      |
| Lemons             | 120,330 | 113,392 | 113,931 | 106,249 | 110,507 | 77,414      | 71,005      |
| Raisins            | 115,215 | 120,741 | 104,225 | 83,832  | 109,877 | 63,740      | 64,341      |

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 1997           | FY 1998           | FY 1999           | FY 2000           | FY 2001           | Oct. - Apr.       | Oct. - Apr.       |
|-----------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
|                       |                   |                   |                   |                   |                   | FY 2001           | FY 2002           |
| --- 1,000 Dollars --- |                   |                   |                   |                   |                   |                   |                   |
| Beer                  | 1,443,326         | 1,677,002         | 1,865,038         | 2,126,018         | 2,296,135         | 1,226,528         | 1,362,200         |
| Wine & Wine Prdts.    | 1,629,254         | 1,829,709         | 2,150,057         | 2,271,185         | 2,283,829         | 1,329,539         | 1,441,214         |
| Bananas & Plantns     | 1,194,458         | 1,188,442         | 1,180,227         | 1,098,409         | 1,125,986         | 641,798           | 669,174           |
| Nursery Products      | 565,267           | 632,672           | 673,194           | 745,977           | 789,101           | 479,844           | 479,540           |
| Fresh Tomatoes        | 611,612           | 735,180           | 713,121           | 608,428           | 755,045           | 507,521           | 365,633           |
| Fresh Grapes          | 386,183           | 440,659           | 545,409           | 518,260           | 581,556           | 397,255           | 458,935           |
| Cut Flowers           | 572,926           | 630,067           | 578,766           | 623,213           | 577,418           | 378,819           | 350,075           |
| Fresh Peppers         | 251,908           | 343,606           | 324,880           | 451,848           | 507,988           | 328,418           | 275,754           |
| Cashews               | 292,315           | 339,490           | 390,111           | 487,687           | 366,689           | 215,669           | 202,802           |
| Frz. Potato Fries     | 156,831           | 216,576           | 252,437           | 321,914           | 338,228           | 193,288           | 224,199           |
| Essential Oils        | 322,447           | 350,086           | 315,861           | 309,570           | 300,590           | 180,601           | 190,047           |
| Fresh Melons          | 226,502           | 250,921           | 277,880           | 259,797           | 285,704           | 240,044           | 234,554           |
| All Apple Juices      | 354,632           | 228,735           | 210,263           | 278,975           | 230,406           | 127,365           | 135,246           |
| Olives                | 184,217           | 181,730           | 200,293           | 184,928           | 204,810           | 114,273           | 116,936           |
| Fresh Cucumbers       | 100,823           | 154,634           | 138,241           | 168,771           | 200,549           | 137,882           | 128,560           |
| All Orange Juices     | 240,072           | 211,353           | 285,947           | 243,298           | 185,093           | 118,735           | 81,765            |
| Fresh Onions          | 127,447           | 151,990           | 135,574           | 131,705           | 168,116           | 122,934           | 105,792           |
| Fresh Mangos          | 123,009           | 125,047           | 138,823           | 142,010           | 152,116           | 60,558            | 78,720            |
| Fresh Pineapple       | 74,441            | 83,676            | 121,679           | 117,539           | 151,753           | 86,767            | 93,367            |
| Total Other           | 4,222,577         | 4,604,941         | 5,368,446         | 5,315,151         | 5,524,521         | 3,357,084         | 3,770,632         |
| <b>GRAND TOTAL</b>    | <b>13,080,247</b> | <b>14,376,516</b> | <b>15,866,247</b> | <b>16,404,683</b> | <b>17,025,633</b> | <b>10,244,922</b> | <b>10,765,145</b> |

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 1997   | FY 1998   | FY 1999   | FY 2000   | FY 2001   | Oct. - Apr. | Oct. - Apr. |
|--------------------|-----------|-----------|-----------|-----------|-----------|-------------|-------------|
|                    |           |           |           |           |           | FY 2001     | FY 2002     |
| Beer               | 1,612,379 | 1,869,577 | 2,072,394 | 2,290,532 | 2,490,735 | 1,322,872   | 1,455,554   |
| Wine & Wine Prdts. | 432,192   | 428,664   | 420,152   | 481,164   | 510,730   | 288,075     | 329,772     |
| Bananas & Plantns  | 3,911,294 | 4,135,832 | 4,369,283 | 4,350,838 | 4,046,727 | 2,378,565   | 2,376,746   |
| Nursery Products   | 2,206,085 | 2,460,306 | 2,765,772 | 2,860,569 | 2,926,298 | 1,637,911   | 1,680,361   |
| Fresh Tomatoes     | 743,205   | 856,852   | 722,591   | 708,690   | 868,118   | 601,714     | 405,124     |
| Fresh Grapes       | 857       | 1,039     | 978       | 1,185     | 1,061     | 845         | 990         |
| Cut Flowers        | 2,770,092 | 2,770,186 | 2,707,948 | 2,804,568 | 2,642,134 | 1,679,171   | 1,635,155   |
| Fresh Peppers      | 284,221   | 319,671   | 345,444   | 352,169   | 346,518   | 222,641     | 265,979     |
| Frz. Potato Fries  | 269,794   | 353,931   | 397,455   | 470,605   | 519,751   | 293,349     | 365,006     |
| Fresh Melons       | 779,005   | 860,437   | 873,032   | 898,995   | 878,214   | 740,182     | 793,941     |
| All Apple Juices   | 1,084,986 | 1,016,823 | 1,140,355 | 1,171,502 | 1,230,760 | 627,351     | 758,735     |
| Fresh Cucumbers    | 302,306   | 327,745   | 336,045   | 346,863   | 373,596   | 285,124     | 287,447     |
| All Orange Juices  | 1,116,798 | 1,063,239 | 1,326,231 | 1,284,749 | 976,227   | 628,956     | 413,006     |
| Fresh Onions       | 261,088   | 259,188   | 246,532   | 224,080   | 269,156   | 190,473     | 183,784     |
| Fresh Mangos       | 191,115   | 188,767   | 212,992   | 231,078   | 229,492   | 83,397      | 115,281     |
| Fresh Pineapple    | 171,253   | 255,533   | 272,601   | 304,207   | 333,476   | 198,650     | 198,171     |
| Fresh Squash       | 141,192   | 157,537   | 151,916   | 156,520   | 168,099   | 147,281     | 148,289     |
| Frozen Broccoli    | 169,458   | 153,962   | 186,187   | 164,090   | 168,988   | 113,587     | 123,320     |
| Fresh Apples       | 168,564   | 156,700   | 158,550   | 170,490   | 156,593   | 58,260      | 68,178      |

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 | 2001  | 2002  |       | % Change Last Month | % Change Last Year |
|---------------------|----------------|-------|-------|-------|---------------------|--------------------|
|                     |                | May   | April | May\1 |                     |                    |
| Dollars/unit        |                |       |       |       |                     |                    |
| Grapefruit 2/       | Box            | 1.65  | 1.02  | 1.05  | 2.9%                | -36.4%             |
| Lemons 2/           | Box            | 5.46  | 5.19  | 7.58  | 46.1%               | 38.8%              |
| Limes 2/            | Box            | 0     | 0     | 0     | n/a                 | n/a                |
| Oranges 2/          | Box            | 4.41  | 4.3   | 4.82  | 12.1%               | 9.3%               |
| Tangelos 2/         | Box            | 0     | 0     | 0     | n/a                 | n/a                |
| Tangerines 2/       | Box            | 13.81 | 13.17 | 19.33 | 46.8%               | 40.0%              |
| Temples 2/          | Box            | 0     | 0     | 0     | n/a                 | n/a                |
| Apples, fresh 3/    | Lb.            | 0.152 | 0.215 | 0.218 | 1.4%                | 43.4%              |
| Grapes              | Ton            | 790   | 0     | 0     | n/a                 | -100.0%            |
| Peaches             | Lb.            | 0.396 | 0     | 0.475 | n/a                 | 19.9%              |
| Pears, fresh 3/     | Ton            | 417   | 267   | 267   | 0.0%                | -36.0%             |
| Strawberries, fresh | Lb.            | 0.516 | 0.6   | 0.613 | 2.2%                | 18.8%              |
| Asparagus 4/        | Cwt.           | 114   | 99.5  | 111   | 11.6%               | -2.6%              |
| Broccoli 4/         | Cwt.           | 25.5  | 24    | 20.3  | -15.4%              | -20.4%             |
| Cantaloupes         | Cwt.           | 27.1  | 0     | 30.3  | n/a                 | 11.8%              |
| Carrots 4/          | Cwt.           | 17.6  | 21.2  | 21.2  | 0.0%                | 20.5%              |
| Cauliflower 4/      | Cwt.           | 26.3  | 25.4  | 18.8  | -26.0%              | -28.5%             |
| Celery 4/           | Cwt.           | 24    | 18.6  | 14.1  | -24.2%              | -41.3%             |
| Sweet Corn 4/       | Cwt.           | 24.6  | 18.8  | 18    | -4.3%               | -26.8%             |
| Cucumbers 4/        | Cwt.           | 15.6  | 21.5  | 13.1  | n/a                 | -16.0%             |
| Lettuce 4/          | Cwt.           | 18.8  | 13.7  | 9.87  | -28.0%              | -47.5%             |
| Onions 4/           | Cwt.           | 15.5  | 19    | 20.4  | 7.4%                | 31.6%              |
| Snap Beans 4/       | Cwt.           | 47.6  | 43.8  | 41.3  | -5.7%               | -13.2%             |
| Tomatoes 4/         | Cwt.           | 37.8  | 32.3  | 31.5  | -2.5%               | -16.7%             |

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.