

Pear Situation in Selected Northern Hemisphere Countries

Pear production in selected countries of the Northern Hemisphere in 2002/03 is expected to continue its upward trend. Forecast at a record 13 million tons, production of pears in 2002/03 in selected Northern Hemisphere countries is up slightly from last season and represents the 8th consecutive season of increasing production. The growth in the Northern Hemisphere mirrors the continued expansion of pear acreage in China, the top producer. China's pear crop this season is forecast at nearly 9 million tons, about 70 percent of the 2002/03 Northern Hemisphere pear crop forecast. On the other hand, the 2002/03 U.S. pear crop is forecast to fall to 860,000 tons, the lowest level in the last six seasons.

The United States

U.S. Pear Production Forecast to Decrease in 2002/03

U.S. total pear production in 2002/03 is forecast at 860,000 tons, down 6 percent from last season's large crop and the smallest volume since 1996/97, when production totaled nearly 745,000 tons. The smaller 2002/03 U.S. pear crop forecast is mainly the result of unfavorable weather in California and Washington, where 75 percent of the U.S. pear crop is produced. In California, hail damage is expected to hold the pear crop down for the third-consecutive season. Freezing temperatures during the spring will more than likely hamper pear production in Washington in 2002/03.

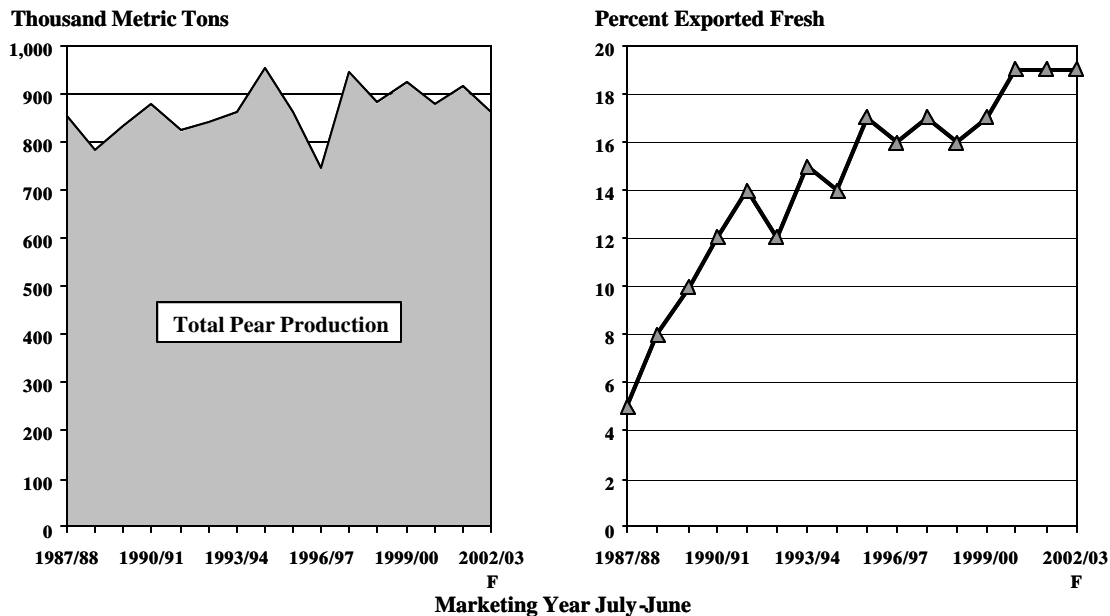
U.S. production of Bartlett pears in 2002/03 is forecast to decrease 5 percent in California and 10 percent in Washington. Bartlett pears, which are used mostly for canning, account for more than half of the pears produced in the United States. The economic difficulties of some U.S. processing industries are expected to encourage more diversion of Bartlett pears to the fresh domestic and export markets.

Pear Exports from the United States Reached Record Volume and Value in the 2001/02 Marketing Season

Exports have become vital for the success of the pear industry, generating a significant and growing share of the income of U.S. pear farmers. During the 2001/02 marketing season (July-June), the United States exported more than 170,000 tons of pears, valued just about \$100 million, both records. Mexico, with nearly half of the export volume and value, remained the top destination for U.S. pears in 2001/02. U.S. exports to Mexico, however, declined 4 percent in volume to 81,450 tons and 2 percent in value to \$44 million. Shipments to Canada, the second largest buyer of U.S. pears, totaled 50,000 tons, about a third of the export volume, and \$34 million or 35 percent of the value exported. Mexico and Canada combined accounted for three quarters of the volume and 80 percent of the value. The Netherlands (5 percent), Venezuela (4 percent), and Sweden (2 percent) completed the top five largest markets.

Exports of U.S. pears continue to expand in some non-traditional markets, such as those in the Caribbean region. Last season, the volume U.S. pear shipments to the Caribbean increased 60 percent to more than 700 tons, valued at \$500 million. The Dominican Republic, accounting for most of the shipments, has become the top buyer of U.S. pears in the region. During the last five seasons, the volume of U.S. pear sales to the Dominican Republic has increased more than 500 percent and the value 40 percent.

Exports Have Become Increasingly Important to the U.S. Pear Industry



Source: USDA National Agricultural Statistics Service and U.S. Census of the Bureau

Overall last season, ample supplies of good quality fresh-marketed pears, the continued diversion of more processing pears into the fresh market, and continued promotion efforts kept U.S. pear exports strong.

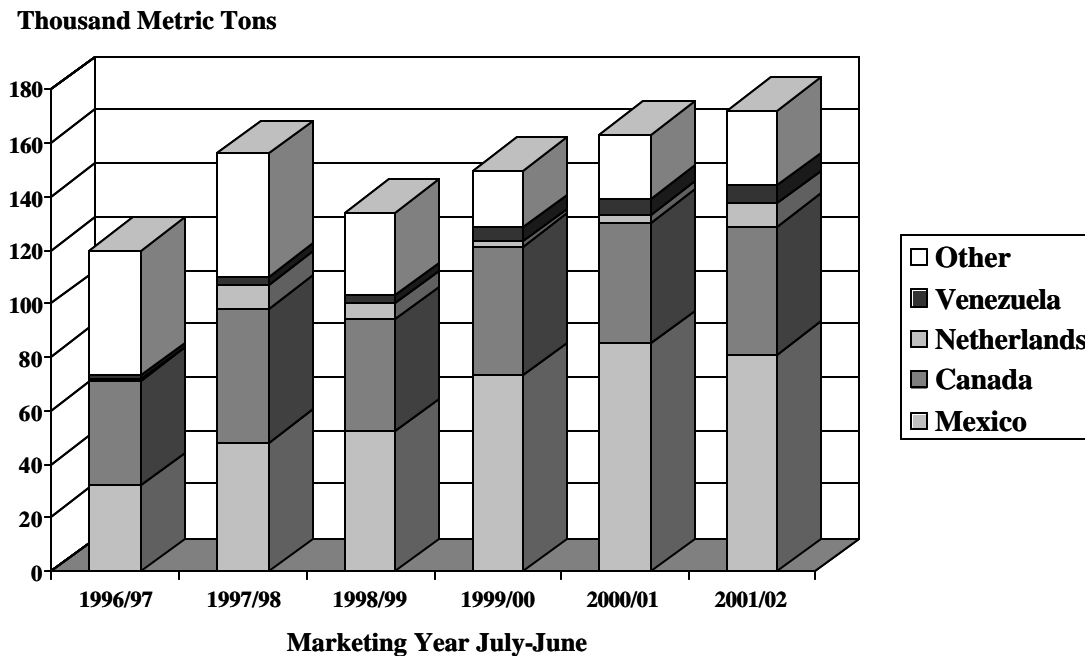
Mexico

Mexico's Pear Imports to Continue to Increase in 2002/03

Mexico continues to rely on imports to meet increased fresh pear domestic demand, because domestic production is minimal and not expanding. In 2002/03, Mexico's pear imports are forecast to increase again, surpassing the 100,000-ton level. The United States accounts for about 95 percent of Mexican imports. Mexico's market for U.S. pears has grown steadily and now accounts for half of U.S. pear shipments and 10 percent of the U.S. production. Promotion activities under MAP have been a key element in the success of U.S. pears in Mexico.

Pear consumption in Mexico in 2002/03 is forecast to increase to nearly 135,000 tons. Mexicans prefer the Anjou variety followed by the Bartlett, which is rapidly gaining acceptance. However, other varieties of pears are not yet as popular. Great efforts continue to be made to promote the Bosc variety, which was, until recently, unknown to Mexican consumers.

Mexico Has Become U.S. Pears #1 Export Market



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

China

Exports Becoming an Increasingly Important Outlet for Chinese Pears

Pear shipments from China continue to increase and are becoming more and more important to Chinese pear growers. China pear shipments have increased steadily and dramatically in recent years, mostly driven by improved fruit quality. Last season, for example, China exported a record of nearly 195,000 tons of pears, more than twice the volume shipped in 1995/96. Fruit quality in China continues to improve, and, as such, pear exports are forecast to increase to 200,000 tons in 2002/03. Russia and countries in Southeast Asia are the main export destinations for most of China's pear exports.

The United States Resumes Imports of Chinese Ya Pear

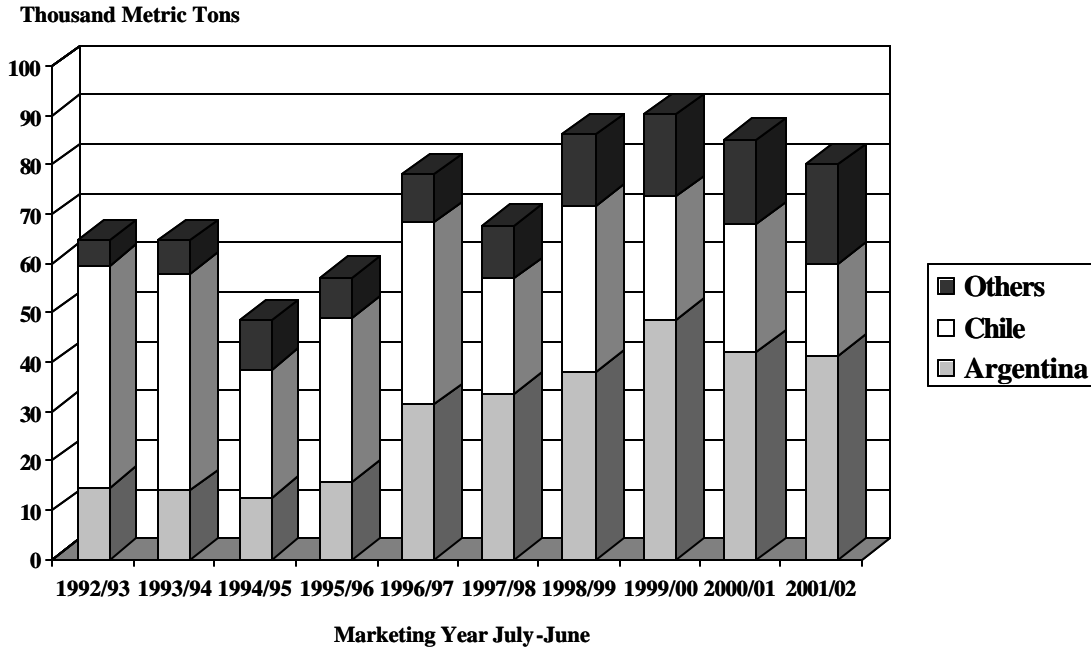
In October 2002, the United States approved the resumption of imports of Chinese Ya pears. The development followed a site visit by a technical team from APHIS to Ya pear production orchards in Hebei Province and Shandong Provinces. During the visit, the APHIS team assessed post-harvest mitigation measures associated with black spot (*Alternaria sp.* and *Venturia nashicola*) in the two Ya pear production areas. After satisfactorily assessing the post-harvest mitigation measure for both diseases, the resumption of the Hebei Ya pear export program and the initiation of a new Ya pear export program for the Shandong Province were approved.

China's exports of Ya pears to the United States started in 1997 and were one of the commodities for which China was seeking access to the United States under the U.S.-China bilateral agreement. Chinese Ya pear shipments to the United States were valued at about \$3 million in 2001 and represented China's only significant exports of fresh fruit to the United States. The United States banned entry of Ya Pears from China in March 2001 after numerous shipments were found with symptoms of black spot and other diseases.

Selected Countries Import Tariff on Fresh Pears

Country	Tariff Import
Argentina	25%
Brazil	12.5%
Chile	8%
Venezuela	15%
Saudi Arabia	5%
Turkey	62.3%
Egypt	50%
India	40%
Japan	5%
Korea	50%
Philippines	10%
Taiwan	30%
Thailand	39%
United States	April-June: 0, July- March: .3 cents/kg

Argentina and Chile Continue to Supply Most of the U.S. Pear Import Market



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

(For information on production and trade, contact Samuel Rosa at 202-720-6086. For information on marketing, contact Steve Shnitzler at 202-720-8495. The FAS Attache Report search engine contains reports on deciduous fruit for more than 20 countries. Also, visit our pear web page at: <http://www.fas.usda.gov/http/horticulture/pears/html>)

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

Country Mktg. Year 1/	Production	Imports	Supply Utilization	Exports	Domestic Consumption	Processed	Withdrawals
NORTHERN HEMISPHERE COUNTRIES							
SELECTED EUROPEAN UNION (EU) COUNTRIES							
Belgium-Luxembourg							
1999/00	165,220	66,425	231,645	171,205	45,610	14,000	830
2000/01	183,059	63,957	247,016	195,194	45,471	2,500	3,851
2001/02	89,676	90,000	179,676	132,500	45,408	1,500	268
2002/03 F	147,390	70,000	217,390	168,000	45,500	2,000	1,890
France							
1999/00	267,000	101,000	368,000	39,000	279,000	45,000	5,000
2000/01	258,000	105,000	363,000	35,000	278,000	45,000	5,000
2001/02	247,000	91,600	338,600	45,400	245,600	45,000	2,600
2002/03 F	257,000	98,000	355,000	50,000	255,000	45,000	5,000
Germany							
1999/00	54,042	167,770	221,812	8,754	211,892	1,163	3
2000/01	65,162	150,754	215,916	10,654	203,036	2,184	42
2001/02	46,823	159,758	206,581	10,164	195,155	1,262	0
2002/03 F	44,000	161,000	205,000	8,750	195,250	1,000	0
Greece							
1999/00	66,000	17,000	83,000	1,400	72,950	8,400	250
2000/01	60,000	14,000	74,000	1,000	64,750	8,000	250
2001/02	55,000	15,000	70,000	1,000	60,800	8,000	200
2002/03 F	24,500	28,000	52,500	600	44,685	7,000	215
Italy							
1999/00	784,000	115,000	899,000	123,000	688,000	80,000	8,000
2000/01	940,000	94,000	1,034,000	138,000	776,000	110,000	10,000
2001/02	840,000	119,000	959,000	126,000	743,000	90,000	0
2002/03 F	910,000	100,000	1,010,000	135,000	765,000	110,000	0
Netherlands							
1999/00	135,000	126,428	261,428	174,855	76,941	9,632	0
2000/01	195,000	130,642	325,642	190,000	130,142	5,500	0
2001/02	70,000	132,899	202,899	90,000	108,899	4,000	0
2002/03 F	175,000	130,000	305,000	185,000	115,000	5,000	0
Spain							
1999/00	682,500	24,500	707,000	138,000	499,000	40,000	30,000
2000/01	595,000	43,000	638,000	103,000	470,000	43,800	21,200
2001/02	661,000	25,000	686,000	171,000	460,000	40,000	15,000
2002/03 F	626,100	30,000	656,100	115,000	481,100	40,000	20,000
Sweden							
1999/00	12,771	31,684	44,455	129	44,326	0	0
2000/01	13,375	27,449	40,824	256	40,568	0	0
2001/02	12,098	28,317	40,415	404	40,011	0	0
2002/03 F	15,700	30,000	45,700	300	45,400	0	0
United Kingdom							
1999/00	18,052	133,000	151,052	2,500	148,052	400	100
2000/01	34,031	119,624	153,655	3,280	149,875	400	100
2001/02	34,970	99,100	134,070	3,800	129,870	400	0
2002/03 F	34,500	120,000	154,500	3,000	151,000	500	0

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Country Mktg. Year 1/	Production	Imports	Supply Utilization	Exports	Domestic Consumption	Processed	Withdrawals
SUBTOTAL SELECTED EU COUNTRIES							
1999/00	2,184,585	782,807	2,967,392	658,843	2,065,771	198,595	44,183
2000/01	2,343,627	748,426	3,092,053	676,384	2,157,842	217,384	40,443
2001/02	2,056,567	760,674	2,817,241	580,268	2,028,743	190,162	18,068
2002/03 F	2,234,190	767,000	3,001,190	665,650	2,097,935	210,500	27,105
OTHER NORTHERN HEMISPHERE COUNTRIES							
Canada							
1999/00	17,419	70,670	88,089	779	82,610	4,700	0
2000/01	15,072	72,009	87,081	465	82,116	4,500	0
2001/02	17,000	75,000	92,000	500	86,900	4,600	0
2002/03 F	17,500	77,000	94,500	500	89,000	5,000	0
China; Peoples Republic of							
1999/00	7,742,331	9,750	7,752,081	109,004	7,186,277	456,800	0
2000/01	8,400,000	620	8,400,620	167,527	7,813,093	420,000	0
2001/02	8,820,000	664	8,820,664	193,903	8,185,761	441,000	0
2002/03 F	8,800,000	655	8,800,655	200,000	8,159,655	441,000	0
Japan							
1999/00	415,700	309	416,009	4,169	411,340	500	0
2000/01	423,800	576	424,376	3,191	420,685	500	0
2001/02	397,000	907	397,907	2,821	394,586	500	0
2002/03 F	426,300	700	427,000	3,000	423,500	500	0
Mexico							
1999/00	33,352	74,158	107,510	0	105,510	2,000	0
2000/01	31,280	95,513	126,793	0	124,793	2,000	0
2001/02	32,968	98,000	130,968	0	128,968	2,000	0
2002/03 F	33,500	102,000	135,500	0	133,500	2,000	0
Russian Federation							
1999/00	136,600	77,430	214,030	80	162,000	51,000	950
2000/01	190,400	104,985	295,385	155	229,665	60,400	5,165
2001/02	226,000	141,060	367,060	110	287,650	72,100	7,200
2002/03 F	226,000	142,000	368,000	200	290,000	73,000	4,800
Turkey							
1999/00	360,000	151	360,151	12,204	329,947	18,000	0
2000/01	380,000	118	380,118	11,707	349,411	19,000	0
2001/02	360,000	10	360,010	17,000	325,010	18,000	0
2002/03 F	375,000	0	375,000	20,000	336,500	18,500	0
United States							
1999/00	921,202	90,263	1,011,465	153,270	425,231	432,964	0
2000/01	877,385	85,094	962,479	167,547	430,207	364,725	0
2001/02	912,457	79,743	992,200	172,314	437,861	382,025	0
2002/03 F	860,000	85,000	945,000	165,000	420,000	360,000	0
SUBTOTAL OTHER NORTHERN HEMISPHERE COUNTRIES							
1999/00	9,626,604	322,731	9,949,335	279,506	8,702,915	965,964	950
2000/01	10,317,937	358,915	10,676,852	350,592	9,449,970	871,125	5,165
2001/02	10,765,425	395,384	11,160,809	386,648	9,846,736	920,225	7,200
2002/03 F	10,738,300	407,355	11,145,655	388,700	9,852,155	900,000	4,800

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(METRIC TONS)

Country Mktg. Year 1/	Production	Imports	Supply Utilization	Exports	Domestic Consumption	Processed	Withdrawals
TOTAL NORTHERN HEMISPHERE COUNTRIES							
1999/00	11,811,189	1,105,538	12,916,727	938,349	10,768,686	1,164,559	45,133
2000/01	12,661,564	1,107,341	13,768,905	1,026,976	11,607,812	1,088,509	45,608
2001/02	12,821,992	1,156,058	13,978,050	966,916	11,875,479	1,110,387	25,268
2002/03 F	12,972,490	1,174,355	14,146,845	1,054,350	11,950,090	1,110,500	31,905
SOUTHERN HEMISPHERE COUNTRIES							
Argentina							
1999/00	478,078	786	478,864	279,462	119,867	79,535	0
2000/01	610,110	468	610,578	315,631	111,537	183,410	0
2001/02	550,000	300	550,300	350,000	100,300	100,000	0
2002/03 F	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Australia							
1999/00	156,000	1,116	157,116	20,562	73,000	63,554	0
2000/01	160,000	1,027	161,027	16,877	74,728	69,422	0
2001/02	165,000	1,000	166,000	16,700	84,000	65,300	0
2002/03 F	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Chile							
1999/00	237,000	0	237,000	124,700	65,300	47,000	0
2000/01	249,000	0	249,000	128,900	69,100	51,000	0
2001/02	232,000	0	232,000	124,000	68,000	40,000	0
2002/03 F	N/A	N/A	N/A	N/A	N/A	N/A	N/A
New Zealand							
1999/00	32,555	1,400	33,955	6,500	20,905	6,550	0
2000/01	23,256	1,400	24,656	4,500	15,606	4,550	0
2001/02	23,800	1,400	25,200	5,500	15,150	4,550	0
2002/03 F	N/A	N/A	N/A	N/A	N/A	N/A	N/A
South Africa; Republic of							
1999/00	277,336	0	277,336	98,330	53,510	121,816	3,680
2000/01	246,320	0	246,320	90,406	60,860	93,054	2,000
2001/02	250,000	0	250,000	92,000	62,000	94,800	1,200
2002/03 F	N/A	N/A	N/A	N/A	N/A	N/A	N/A
TOTAL SOUTHERN HEMISPHERE COUNTRIES							
1999/00	1,180,969	3,302	1,184,271	529,554	332,582	318,455	3,680
2000/01	1,288,686	2,895	1,291,581	556,314	331,831	401,436	2,000
2001/02	1,220,800	2,700	1,223,500	588,200	329,450	304,650	1,200
2002/03 F	N/A	N/A	N/A	N/A	N/A	N/A	N/A
WORLD GRAND TOTAL							
1999/00	12,992,158	1,108,840	14,100,998	1,467,903	11,101,268	1,483,014	48,813
2000/01	13,950,250	1,110,236	15,060,486	1,583,290	11,939,643	1,489,945	47,608
2001/02	14,042,792	1,158,758	15,201,550	1,555,116	12,204,929	1,415,037	26,468
2002/03 F	N/A	N/A	N/A	N/A	N/A	N/A	N/A

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

2/ U.S. import/export forecasts are based on trends during recent years, trade contacts, and shipments from July to August 2002.

F= Forecast

TABLE 2
U.S. PEAR EXPORTS
COMPLETE MARKETING YEARS 1997/98-2001/02
(JULY-JUNE)
METRIC TONS

Country of Destination						Percent
Destination	1997/98	1998/99	1999/00	2000/01	2001/02	Changed
1 Mexico	48,220	52,321	73,173	85,095	81,448	-4%
2 Canada	50,150	41,668	48,073	45,367	48,997	8%
3 Netherlands	9,340	6,466	2,132	2,724	8,317	205%
4 Venezuela	3,439	2,824	5,283	5,982	7,125	19%
5 Sweden	7,796	4,283	3,040	3,747	3,723	-1%
6 Taiwan	4,323	4,039	3,799	3,572	3,486	-2%
7 United Arab Emirates	1,868	887	1,562	2,281	1,991	-13%
8 Colombia	1,506	1,321	2,079	1,109	1,936	75%
9 Brazil	17,506	10,381	4,058	7,120	1,726	-76%
10 Hong Kong	2,191	1,559	820	851	1,545	82%
11 Saudi Arabia	3,494	2,980	2,700	2,220	1,338	-40%
12 United Kingdom	1,271	1,095	423	422	1,307	210%
13 Israel	2,529	2,343	349	785	1,153	47%
14 Germany	476	298	391	326	970	198%
15 Singapore	1,186	751	513	695	970	40%
16 Costa Rica	713	549	416	878	892	2%
17 Panama	610	536	1,355	922	641	-30%
18 Guatemala	514	227	312	587	562	-4%
19 Dominican Republic	77	257	303	353	489	39%
20 Yemen	0	0	0	353	458	30%
21 Indonesia	292	51	158	128	414	223%
22 New Zealand	50	0	26	35	368	951%
23 Russian Federation	4,393	440	165	174	311	79%
24 El Salvador	33	52	88	194	294	52%
25 Ireland	185	160	62	172	294	71%
26 Bahrain	192	112	82	214	267	25%
27 Ecuador	165	92	63	18	246	1267%
28 Korea; Republic of	0	0	6	0	161	100%
29 Trinidad and Tobago	60	84	120	71	147	107%
30 Kuwait	151	198	170	124	103	-17%
31 China	0	19	0	0	90	100%
32 Malaysia	141	38	0	37	89	141%
33 Peru	99	174	42	14	74	429%
34 Iceland	262	254	194	0	67	100%
35 Bahamas; The	125	31	3	4	67	1575%
36 Japan	200	292	91	92	64	-30%
37 Honduras	93	120	166	29	40	38%
38 Thailand	44	0	0	0	35	100%
39 Philippines	0	108	73	11	25	127%
40 Niger	0	0	0	0	22	100%
Others	1,177	1,272	980	841	62	-93%
Grand Total	164,871	138,282	153,270	167,547	172,314	3%

Source: U.S. Bureau of the Census

TABLE 3
U.S. PEAR IMPORTS
COMPLETE MARKETING YEARS 1997/98-2001/02
(JULY-JUNE)
METRIC TONS

Country of Destination						Percent
Destination	1997/98	1998/99	1999/00	2000/01	2001/02	Changed
1 Argentina	33,591	38,129	48,619	42,244	41,384	-2%
2 Chile	23,321	33,552	25,031	25,774	18,804	-27%
3 China	20	1,147	2,789	6,506	7,448	14%
4 South Korea	920	1,586	2,996	5,827	6,283	8%
5 New Zealand	3,881	4,462	5,282	2,417	4,834	100%
6 South Africa	5,020	6,271	4,456	1,499	466	-69%
7 Japan	303	491	539	352	378	7%
8 Canada	771	559	546	400	141	-65%
9 Bolivia	0	0	0	0	5	100%
11 Dominican Republic	0	0	4	0	0	0%
12 Italy	0	195	0	0	0	0%
13 Mexico	37	32	0	0	0	0%
14 Netherlands	0	0	1	0	0	0%
16 Spain	0	0	0	75	0	-100%
Grand Total	67,864	86,424	90,263	85,094	79,743	-6%

Source: U.S. Bureau of the Census