

World Pear Situation and Outlook

Pear production in selected countries in 2000/01 is forecast at 13.6 million metric tons, up 4 percent from the 1999/2000 output. Larger crops are expected in some major pear producing countries, such as China, Italy, Argentina, and South Africa. On the other hand, smaller pear crops in 2000/01 are expected in some other important producing countries, including the United States, Spain, and France. Selected countries' pear exports in 2000/01 are forecast at 1.6 million tons, 6 percent above the previous season's shipments. Higher exportable supplies are anticipated in the main exporting countries of China, the Netherlands, Italy, the United States, Argentina, and Chile. The 2000/01 U.S. pear export forecast has been revised up 10 percent to a record 170,000 tons, which is 11 percent higher than shipments in 1999/2000 and 3 percent more than the 1997/98 record. The increase in U.S. shipments mainly reflects larger supplies of good quality fresh-marketed pears and the diversion of more processing pears into the fresh market. This situation has put downward pressure on prices and has spurred demand from important customers. U.S. pear exports in 2000/01 are also benefitting from improving Asian economies and continued U.S. promotion efforts.

Northern Hemisphere

Production

Pear production in selected Northern Hemisphere countries in 2000/01 is forecast at 12.2 million tons, up 3 percent from the 1999/2000 output. The increase mainly reflects a larger crop in *China*, the world's leading pear producer, and in *Italy*, the second-largest producer. On the other hand, pear production in the *United States*, the third-largest producer, is now forecast to decrease 4 percent in 2000/01 to 885,000 tons.

China's pear production is forecast to increase to more than 8 million tons in 2000/01. Pear production in China has increased steadily during the last years, as a result of extensive planting during the 1980's and early 1990's. Most of China's pear crops are grown by many individual growers on small parcels of land. Large scale commercial orchards are rare. Ya pears are the most popular variety grown in China, accounting for about 30 percent of production. Other important varieties include Su, Xuehua, and Pingguo pears.

Italian pear production, the largest in the European Union (EU), is expected to have bounced back this season from the reduced 1999/2000 crop. However, Italy's 2000/01 pear production forecast has been revised to 910,000 tons, down slightly from the December estimate, due to unfavorable weather conditions late in the season. Nonetheless, production is 16 percent more than the 1999/2000 crop. The region of Emilia-Romagna in Northern Italy continues to account for the bulk of total Italian pear production. Abate and Williams are the two major pear varieties grown in Italy.

U.S. pear production in 2000/01 is now forecast at 885,000 tons, 3 percent below the December estimate and 4 percent less than production in 1999/2000. The downturn mainly reflects reduced production of Bartlett pears, the main variety, accounting for more than half the U.S. annual pear crop. Production of U.S. Bartletts in 2000/01 is now forecast at nearly 470,000 tons, down 4 percent from the December estimate and 12 percent below the 1999/2000 crop. Normally, about three-quarters of the U.S. Bartlett crop is processed. However, economic difficulties facing some processing industries in northern California continue to divert more Bartletts to the fresh domestic and export markets. This situation is keeping prices lower this season and lowering returns to growers. Reportedly, pear producers in the Pacific Northwest are having the worst season in about 17 years. Washington, California, and Oregon account for more than 95 percent of the U.S. pear crop.

Trade

Northern Hemisphere pear exports in 2000/01 have been revised up to a record 1 million tons, reflecting more shipments from the *United States*. Increased exports are also anticipated from *the Netherlands, Italy, and China*. Pear shipments from these 4 countries will likely account for about 65 percent of Northern Hemisphere pear shipments in 2000/01.

The Netherlands pear exports in 2000/01 are forecast at 181,000 tons, up more than 20 percent from shipments in 1999/2000. A larger pear crop, more favorable prices, and continued strong demand from major customers are boosting Dutch pear shipments this season. The United Kingdom is by far the most important destination for Dutch pears, followed by Russia, Sweden, France, and Norway. The Netherlands is also a transshipment venue for fruit trade in the EU. Almost all Chilean pears destined for the EU market are traded via the Netherlands.

The 2000/01 Italian pear export forecast has been lowered slightly to 150,000 tons. Hail storms in northern Italy late in the season affected the quality of the fruit and, as such, reduced export expectations. Germany is Italy's major pear market, accounting for about half the volume of total shipments.

China's pear exports are forecast to increase to 150,000 tons in 2000/01, mainly the result of a larger crop. Pear shipments from China have increased considerably in recent years. For example, China exported about 140,000 tons of pears in 1999/2000, compared to practically nothing 10 years ago. Fruit quality in China continues to improve contributing to the expansion of its export markets, especially to neighboring Asian countries and Russia.

The 2000/01 U.S. pear export forecast has been revised up 10 percent to a new record of 170,000 tons, which is 11 percent higher than shipments in 1999/2000 and 3 percent more than the 1997/98 existing record. The volume of U.S. pear exports during the period July 2000 to January 2001 totaled nearly 120,000 tons, up 9 percent from the same period last season. The increase in U.S. shipments mainly reflects larger supplies of good quality fresh-marketed pears and the diversion of more processing pears into the fresh market. This situation had put downward pressure on prices and has spurred demand from important customers, including Mexico, Venezuela, and Brazil. U.S. pear exports in 2000/01 are also

benefitting from improving Asian economies and continued U.S. promotion efforts.

Exports have become vital for the success of the U.S. pear industry. The completion of trade agreements and increased promotion activities under the Market Access Program (MAP) have been key elements in the success of U.S. pear exports in recent years. Almost 20 percent of the U.S. total pear crop is now going to export, compared to 5 percent in 1987/88. Canada and Mexico together account for more than three-quarters of total U.S. pear shipments. Continued supplies of good quality fruit, strong demand from leading customers, and market promotion efforts should continue to boost U.S. pear sales in foreign markets.

Southern Hemisphere

Production

Pear production in selected countries of the Southern Hemisphere in 2000/01 (crop harvested in early-2001) is forecast at 1.4 million tons, up 13 percent from last season's reduced output. Production recoveries are expected in the principal southern producing countries of *Argentina, Chile, and South Africa*.

Argentina's pear production, the largest in the Southern Hemisphere, in 2000/01 is forecast to bounce back to 640,000 tons, up nearly 30 percent from the 1999/2000 weather-reduced crop. More favorable climatic conditions this season have increased Argentina's pear production prospects for 2000/01. The majority of Argentina's commercial pear production is located in Rio Negro (about 75 percent). Other important pear-producing regions in Argentina include Neuquen and Mendoza, accounting each for about 12 percent of production. More than half of the Argentine pear crop is exported fresh and the remainder is consumed fresh in the domestic market, processed into juice, or canned.

Chile's 2000/01 pear crop is forecast to increase 5 percent to 249,000 tons, the result of higher yields and slightly larger harvested area. There are more than 36 pear varieties grown in Chile. The Packham's Triumph variety, grown mainly for the fresh market, accounts for about 45 percent of the Chilean pear crop. The Beurre Bosc variety makes up about 25 percent of Chile's pear production and exports.

South Africa's pear production in 2000/01 is forecast at 310,000 tons, 4 percent more than the 1999/2000 crop, due to expanded acreage coming into bearing age. Similar to last year's situation, more pears this season would likely be diverted to juice production due to the increased volume of lower quality fruit.

Trade

Overall pear exports from selected Southern Hemisphere countries in 2000/01 are forecast at about 580,000 tons, up 7 percent from 1999/2000 shipments. Pear exports in 2000/01 are expected to increase for all the major shippers in the Southern Hemisphere, including *Argentina, Chile, and South Africa*.

Argentina's pear shipments, the largest in the Southern Hemisphere, in 2000/01 are forecast at 300,000 tons, up 11 percent from 1999/2000 shipments, based on the larger crop. Argentina's fresh pear marketing season is year round with the bulk exported February through April. Major export markets are Brazil, countries in the EU, mostly Italy, and the United States.

Pear exports from Chile, the second largest supplier in the Southern Hemisphere, are also forecast to increase in 2000/01 to 130,000 tons. A larger volume of good quality fruit is expected to improve Chile's pear shipments this season. The EU is Chile's largest export market, followed by the United States. During the last few years, sales to the Far East and Latin American markets have also shown growth.

Pear exports from South Africa, the third largest exporter in the Southern Hemisphere, are forecast to increase 3 percent in 2000/01 to 118,500 tons, the result of more exportable supplies at lower prices. Countries in the EU remain South Africa's major export markets. South Africa's pear exports to the Middle East are also strong, with a 90-percent market share in the region.

South Africa, Australia, the United Kingdom, Uruguay, Argentina, Chile, France, New Zealand, the Netherlands, Germany, Belgium, Spain, Italy, and Brazil formally launched the World Apple and Pear Association on January 1, 2001. The purpose of the association is to address concerns among the industries, such as the imbalances between demand and supply, variety adjustment, the prevailing low price situation, and the increased role of food safety and standardization in food trade.

(The FAS Attache Report search engine contains reports on the Deciduous Fruit industries for more than 20 countries, including China, Italy, and France. For further information on production and trade, contact Samuel Rosa at 202-720-6086. For information on marketing, contact Sonia Jimenez at 202-720-0898. Also, visit the pear web page at: <http://www.fas.usda.gov/htp/horticulture/pear.html>)

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

Country Mktg. Year 1/	Production	Imports	Supply Utilization	Exports	Domestic Consumption	Processed	Withdrawals
NORTHERN HEMISPHERE COUNTRIES							
EUROPEAN UNION (EU)							
Belgium-Luxembourg							
1997/98	131,060	91,328	222,388	173,197	41,092	7,000	1,099
1998/99	152,660	74,321	226,981	165,915	45,847	14,250	969
1999/00	165,220	74,321	239,541	165,915	53,796	19,000	830
2000/01 F	182,851	65,473	248,324	171,171	56,243	20,500	410
France							
1997/98	258,800	84,000	342,800	73,000	180,300	45,000	44,500
1998/99	246,100	88,000	334,100	45,000	229,100	45,000	15,000
1999/00	287,400	90,000	377,400	51,800	240,600	45,000	40,000
2000/01 F	264,000	100,000	364,000	50,000	230,000	45,000	39,000
Germany							
1997/98	37,000	212,198	249,198	9,851	237,574	1,753	20
1998/99	55,000	190,946	245,946	8,501	235,746	1,679	20
1999/00	54,000	170,328	224,328	8,814	214,339	1,172	3
2000/01 F	55,000	190,000	245,000	8,000	235,790	1,200	10
Greece							
1997/98	58,000	15,000	73,000	1,256	66,974	4,600	170
1998/99	66,000	17,000	83,000	1,400	72,900	8,400	300
1999/00	66,000	17,000	83,000	1,400	72,950	8,400	250
2000/01 F	65,000	17,000	82,000	1,000	72,500	8,000	500
Italy							
1997/98	659,000	134,000	793,000	97,000	616,000	80,000	0
1998/99	1,115,000	60,000	1,175,000	200,000	865,000	110,000	0
1999/00	784,000	115,000	899,000	123,000	688,000	80,000	8,000
2000/01 F	910,000	80,000	990,000	150,000	720,000	110,000	10,000
Netherlands							
1997/98	145,000	109,766	254,766	191,652	58,714	4,200	200
1998/99	140,000	95,250	235,250	145,054	84,996	5,000	200
1999/00	135,000	114,511	249,511	149,531	89,841	10,139	0
2000/01 F	180,000	133,978	313,978	180,932	108,708	24,338	0
Spain							
1997/98	600,000	22,000	622,000	167,000	400,000	26,000	29,000
1998/99	557,000	40,900	597,900	92,300	455,600	35,000	15,000
1999/00	682,500	24,500	707,000	138,000	499,000	40,000	30,000
2000/01 F	595,000	30,000	625,000	100,000	470,000	40,000	15,000
Sweden							
1997/98	11,076	34,503	45,579	114	45,465	0	29,000
1998/99	16,300	33,386	49,686	228	49,458	0	15,000
1999/00	12,771	31,684	44,455	129	44,326	0	30,000
2000/01 F	15,260	30,000	45,260	100	45,160	0	15,000
United Kingdom							
1997/98	24,726	132,774	157,500	2,255	154,695	400	150
1998/99	28,727	130,656	159,383	3,000	155,833	400	150
1999/00	18,052	133,000	151,052	2,500	148,052	400	100
2000/01 F	26,000	130,000	156,000	3,000	152,500	400	100

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(METRIC TONS)

Country Mktg. Year 1/	Production	Imports	Supply Utilization	Exports	Domestic Consumption	Processed	Withdrawals
SUBTOTAL EU							
1997/98	1,924,662	835,569	2,760,231	715,325	1,800,814	168,953	104,139
1998/99	2,376,787	730,459	3,107,246	661,398	2,194,480	219,729	46,639
1999/00	2,204,943	770,344	2,975,287	641,089	2,050,904	204,111	109,183
2000/01 F	2,293,111	776,451	3,069,562	664,203	2,090,901	249,438	80,020
OTHER NORTHERN HEMISPHERE COUNTRIES							
Canada							
1997/98	15,611	69,547	85,158	958	78,900	5,300	0
1998/99	16,760	72,000	88,760	900	82,960	4,900	0
1999/00	17,419	70,670	88,089	779	82,610	4,700	0
2000/01 F	18,000	72,000	90,000	700	84,800	4,500	0
China; Peoples Republic of							
1997/98	6,415,000	600	6,415,600	97,000	5,997,800	320,800	0
1998/99	7,275,464	800	7,276,264	108,900	6,803,564	363,800	0
1999/00	7,740,000	650	7,740,650	140,854	7,199,796	400,000	0
2000/01 F	8,050,000	550	8,050,550	150,000	7,490,550	410,000	0
Japan							
1997/98	427,800	48	427,848	6,202	421,146	500	0
1998/99	409,700	481	410,181	5,396	404,285	500	0
1999/00	415,700	309	416,009	4,169	411,340	500	0
2000/01 F	414,800	400	415,200	5,000	409,700	500	0
Mexico							
1997/98	37,547	51,964	89,511	0	87,511	2,000	0
1998/99	25,690	54,800	80,490	0	78,490	2,000	0
1999/00	33,352	74,158	107,510	0	105,510	2,000	0
2000/01 F	34,000	95,000	129,000	0	127,000	2,000	0
Russian Federation							
1997/98	213,400	187,800	401,200	70	316,700	75,000	9,430
1998/99	181,300	70,000	251,300	50	195,000	55,000	1,250
1999/00	136,600	76,000	212,600	0	161,600	50,000	1,000
2000/01 F	180,000	76,000	256,000	0	200,000	55,000	1,000
Turkey							
1997/98	400,000	160	400,160	11,414	368,746	20,000	0
1998/99	360,000	84	360,084	8,267	333,817	18,000	0
1999/00	360,000	139	360,139	12,200	329,939	18,000	0
2000/01 F	360,000	100	360,100	12,000	330,100	18,000	0
United States 2/							
1997/98	945,741	67,864	1,013,605	164,871	422,701	426,033	0
1998/99	880,097	86,424	966,521	138,282	416,377	411,862	0
1999/00	921,202	90,263	1,011,465	152,954	425,547	432,964	0
2000/01 F	885,000	95,000	980,000	170,000	450,000	360,000	0
SUBTOTAL OTHER NORTHERN HEMISPHERE COUNTRIES							
1997/98	8,455,099	377,983	8,833,082	280,515	7,693,504	849,633	9,430
1998/99	9,149,011	284,589	9,433,600	261,795	8,314,493	856,062	1,250
1999/00	9,624,273	312,189	9,936,462	310,956	8,716,342	908,164	1,000
2000/01 F	9,941,800	339,050	10,280,850	337,700	9,092,150	850,000	1,000

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(METRIC TONS)

Country Mktg. Year 1/	Production	Imports	Supply Utilization	Exports	Domestic Consumption	Processed	Withdrawals
TOTAL NORTHERN HEMISPHERE COUNTRIES							
1997/98	10,379,761	1,213,552	11,593,313	995,840	9,494,318	1,018,586	113,569
1998/99	11,525,798	1,015,048	12,540,846	923,193	10,508,973	1,075,791	47,889
1999/00	11,829,216	1,082,533	12,911,749	952,045	10,767,246	1,112,275	110,183
2000/01 F	12,234,911	1,115,501	13,350,412	1,001,903	11,183,051	1,099,438	81,020
SOUTHERN HEMISPHERE COUNTRIES							
Argentina							
1997/98	515,697	666	516,363	290,911	110,751	114,701	0
1998/99	582,960	312	583,272	286,397	128,956	167,919	0
1999/00	502,650	750	503,400	270,000	95,000	138,400	0
2000/01 F	640,000	700	640,700	300,000	135,000	205,700	0
Australia							
1997/98	152,876	71	152,947	18,362	73,966	60,619	0
1998/99	178,900	1,240	180,140	14,304	84,935	80,901	0
1999/00	170,000	1,488	171,488	20,000	77,400	74,088	0
2000/01 F	180,000	1,500	181,500	22,000	75,000	84,500	0
Chile							
1997/98	258,000	0	258,000	153,000	58,500	46,500	0
1998/99	258,500	0	258,500	156,400	59,500	42,600	0
1999/00	237,000	0	237,000	125,000	65,000	47,000	0
2000/01 F	249,000	50	249,050	130,000	68,050	51,000	0
New Zealand							
1997/98	20,620	150	20,770	4,938	12,600	3,232	0
1998/99	21,850	300	22,150	6,700	12,500	2,950	0
1999/00	32,555	1,400	33,955	11,386	18,019	4,550	0
2000/01 F	23,786	1,400	25,186	8,530	12,106	4,550	0
South Africa; Republic of							
1997/98	265,402	0	265,402	125,887	51,750	87,765	0
1998/99	280,948	0	280,948	113,872	58,810	108,266	0
1999/00	296,768	0	296,768	115,042	62,518	118,848	360
2000/01 F	310,000	0	310,000	118,500	66,210	124,790	500
TOTAL SOUTHERN HEMISPHERE COUNTRIES							
1997/98	1,212,595	887	1,213,482	593,098	307,567	312,817	0
1998/99	1,323,158	1,852	1,325,010	577,673	344,701	402,636	0
1999/00	1,238,973	3,638	1,242,611	541,428	317,937	382,886	360
2000/01 F	1,402,786	3,650	1,406,436	579,030	356,366	470,540	500
WORLD GRAND TOTAL							
1997/98	11,592,356	1,214,439	12,806,795	1,588,938	9,801,885	1,331,403	113,569
1998/99	12,848,956	1,016,900	13,865,856	1,500,866	10,853,674	1,478,427	47,889
1999/00	13,068,189	1,086,171	14,154,360	1,493,473	11,085,183	1,495,161	110,543
2000/01 F	13,637,697	1,119,151	14,756,848	1,580,933	11,539,417	1,569,978	81,520

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

2/ U.S. import/export forecasts are based on trends during recent years, volume traded in the period July, 2000/January, 2001, and trade contacts.

F= Forecast

TABLE 2: U.S. PEAR EXPORTS
MARKETING YEARS 1997/98--1999/2000
(JULY-JUNE)
JULY-JANUARY 1999/00-2000/01 COMPARISONS
METRIC TONS

Country of Destination	1999/00	Total Volume	Total Volume	Total Volume	July-January	July-January	July-January
	Rank	1997/98	1998/99	1999/00	1999/00	2000/01	Percentage Change
Mexico	1	48,220	52,321	73,191	43,322	49,096	13%
Canada	2	50,150	41,668	48,066	38,251	36,513	-5%
Venezuela	3	3,439	2,824	5,368	5,268	5,641	7%
Brazil	4	17,506	10,381	4,058	4,058	7,120	75%
Taiwan	5	4,323	4,039	3,595	1,806	2,484	38%
Sweden	6	7,796	4,283	3,040	2,944	3,651	24%
Saudi Arabia	7	3,494	2,980	2,504	2,483	2,134	-14%
Netherlands	8	9,340	6,466	2,132	2,064	2,702	31%
Colombia	9	1,506	1,321	2,079	2,079	1,109	-47%
United Arab Emirates	10	1,868	887	1,518	820	1,537	87%
Panama	11	610	536	1,392	1,392	840	-40%
Hong Kong	12	2,191	1,559	781	628	801	28%
Singapore	13	1,186	751	556	513	673	31%
Belgium-Luxembourg	14	0	0	436	181	0	-100%
United Kingdom	15	1,271	1,095	423	400	350	-13%
Costa Rica	16	713	549	416	330	680	106%
Germany	17	476	298	391	311	326	5%
Israel	18	2,529	2,343	328	53	387	630%
Dominican Republic	19	77	257	303	233	247	6%
Guatemala	20	514	227	302	242	423	75%
Iceland	21	262	254	194	194	0	-100%
Indonesia	22	292	51	181	158	128	-19%
Kuwait	23	151	198	170	150	102	-32%
Honduras	24	93	120	166	166	29	-83%
Russia	25	4,393	440	165	92	136	48%
Trinidad and Tobago	26	60	84	120	111	62	-44%
Denmark	27	308	102	92	74	49	-34%
Japan	28	200	292	91	24	53	121%
El Salvador	29	33	52	88	81	156	93%
Chile	30	0	0	83	0	0	NA
Bahrain	31	192	112	82	82	214	161%
Philippines	32	0	108	73	73	11	-85%
Finland	33	296	18	72	72	0	-100%
Ecuador	34	165	92	63	63	18	-71%
Ireland	35	185	160	62	62	172	177%
Norway	36	55	16	56	56	0	-100%
Greece	37	148	157	56	0	0	NA
India	38	0	0	45	45	0	-100%
Peru	39	99	174	42	42	14	-67%
Egypt	40	23	263	38	38	84	121%
French Pacific Islands	41	43	52	33	13	23	77%
New Zealand	42	50	0	26	26	35	35%
Brunei	43	17	0	21	21	0	-100%
Argentina	44	0	96	21	21	0	-100%
Georgia	45	0	0	19	19	0	-100%
South Korea	46	0	0	6	0	0	NA
Nicaragua	47	0	393	4	4	0	-100%
The Bahamas	48	125	31	3	3	0	-100%
Barbados	49	0	0	2	0	0	NA
Australia	50	0	86	0	0	0	NA
Cayman Islands	51	0	16	0	0	0	NA
China	52	0	19	0	0	0	NA
Others		471	109	0	2	1,022	51000%
Grand Total		164,871	138,282	152,954	109,070	119,022	9%

Source: Bureau of the Census

TABLE 3: U.S. PEAR IMPORTS
MARKETING YEARS 1996/97-1999/2000
(JULY-JUNE)
METRIC TONS

Country of Origin	1999/00					Percentage Change
	Rank	1996/97	1997/98	1998/99	1999/00	1998/99-1999/00
Argentina	1	31,230	33,591	38,129	48,619	28%
Chile	2	37,053	23,321	33,552	25,031	-25%
New Zealand	3	3,862	3,881	4,462	5,282	18%
South Africa	4	3,685	5,020	6,271	4,456	-29%
South Korea	5	726	920	1,586	2,996	89%
China	6	0	20	1,147	2,789	143%
Canada	7	573	771	559	546	-2%
Japan	8	300	303	491	539	10%
Dominican Republic	9	0	0	0	4	N/A
Netherlands	10	0	0	0	1	N/A
Australia	11	478	0	0	0	N/A
Italy	12	17	0	195	0	-100%
Leeward-Windward Islands	13	0	0	0	0	N/A
Mexico	14	0	37	32	0	-100%
Portugal	15	31	0	0	0	N/A
Uruguay	16	37	0	0	0	N/A
Grand Total		77,993	67,864	86,424	90,263	4%

Source: Bureau of the Census