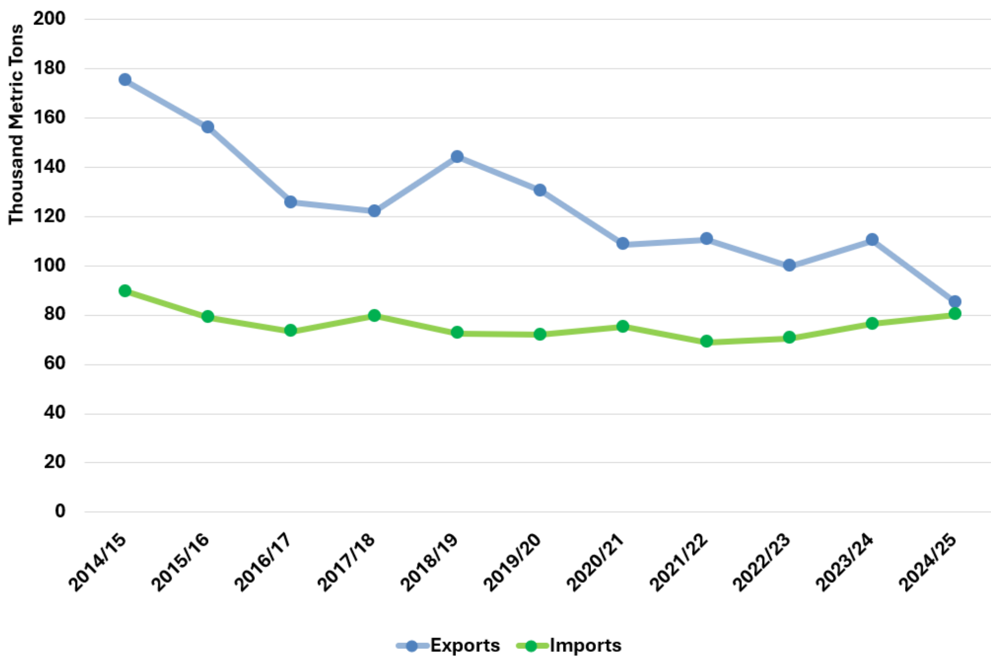
United States Department of Agriculture Foreign Agricultural Service
December 2024

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

U.S. Fresh Pear Exports Fall on Historically Low Harvest



U.S. fresh pear exports are forecast to fall to the lowest level since the 1980s in marketing year 2024/25 (July 2024 – June 2025) as production is expected to fall more than 20 percent. U.S. pear production is forecast at 470,000 metric tons (tons) the lowest volume since 1967/68, as all three producing states experienced year-over-year declines. The United States is expected to fall to the world's sixth-largest pear producer in 2024/25 after being ranked fourth the previous year and third for most of the preceding decade. Constrained by this historically low harvest, U.S. fresh pear exports are forecast at 85,000 tons, less than half the volume exported a decade ago, and at nearly the same level as fresh pear imports.

Output in Washington, normally the top pear-producing state, is projected to drop more than 30 percent and be a smaller harvest than Oregon. A freeze in January damaged pear trees and continued cold weather during the spring blossom further limited volumes. This adverse weather compounds a decade-long trend of falling acreage in Washington. Oregon production is forecast down 15 percent and California down 17 percent, also due to damaging weather.

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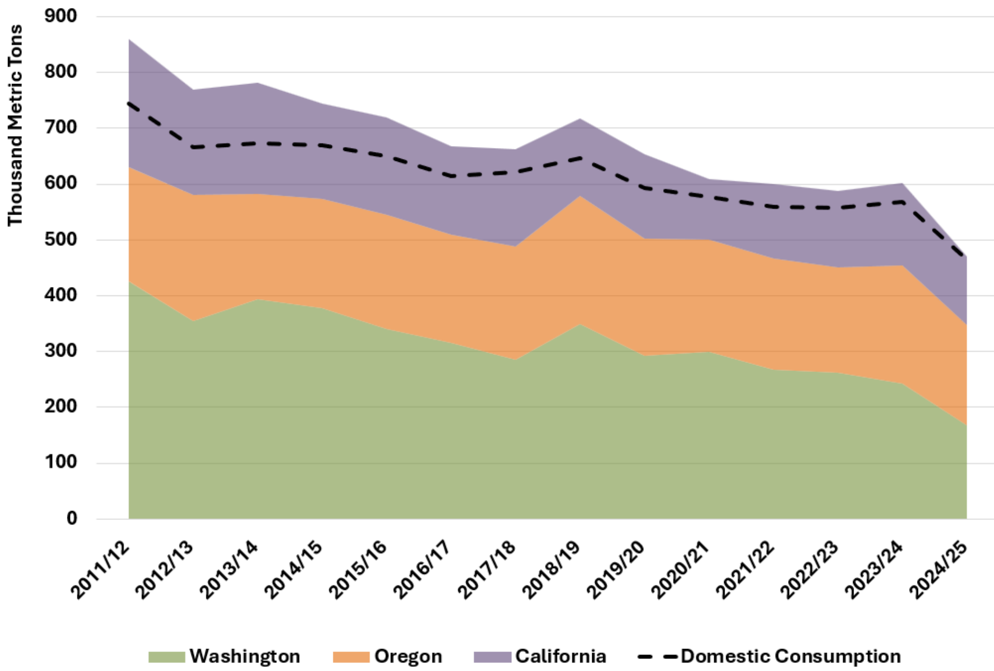
U.S. Pear Production & Consumption Forecast to Continue Downward Trend



Due to the lack of exportable supplies, U.S. fresh pear exports are forecast down 25,000 tons to 85,000, the lowest level since 1988/89. In the first 3 months of the marketing year, exports fell by more than 40 percent compared to the same period in 2023/24. Typically, 90 percent of U.S. pear exports are destined for Canada and Mexico as pears are delicate and difficult to transport long distances. The United States is the top exporter to these markets with approximately 90 percent market share in Mexico and 50 percent in Canada. While the United States may lose some market share in 2024/25, it is unclear if other suppliers will be able to fill the gap.

U.S. imports are projected to rise only slightly to 80,000 tons despite domestic supplies dropping sharply as other countries are not forecast to significantly increase exports. While high U.S. prices could attract Southern Hemisphere supplies that are normally directed to other markets (including the European Union and Russia), U.S. import volumes have shown considerable stability in the past decade despite similar supply shocks. While China is forecast to have increased exportable supplies, shipments to the United States are unlikely to significantly increase because supplies are dominated by Asian varieties of pears that are not readily substituted for U.S. pear varieties that saw the biggest drop in production such as Bosc and Green Anjou. Last year, nearly 30 percent of domestic supplies were allocated to processing. Due to high fresh market prices and significant canned pear inventory, more pears will be sold on the fresh market this year and imports will not be increased to supply processing. With limited growth in imports, domestic pear consumption is forecast at the lowest level in at least 4 decades, accelerating the long-term trend of falling pear consumption including processing volumes.

FRESH APPLES

World apple production for 2024/25 is forecast to fall nearly 350,000 tons to 84.0 million as losses in the European Union, United States, Turkey, and Russia more than offset an increase in China production. Exports are projected down less than 100,000 tons to 6.1 million on lower shipments from the United States and Iran more than offsetting increased exports from China.

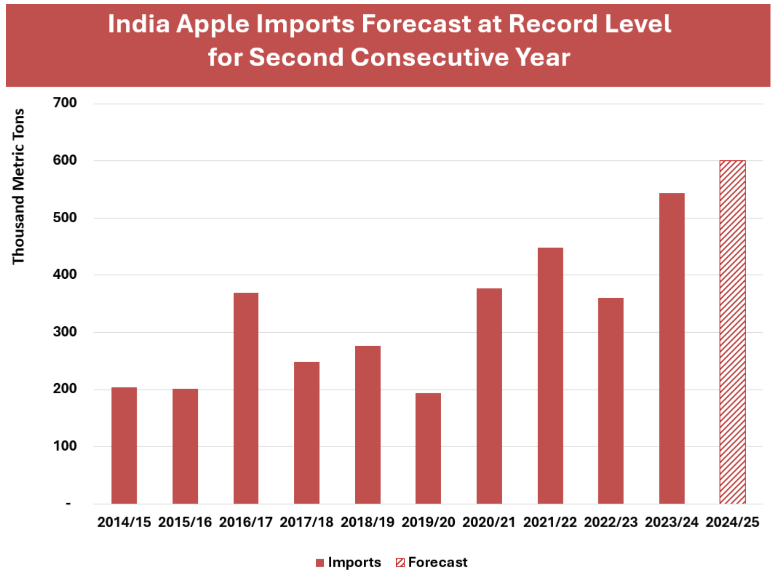
China production is forecast up 1.5 million tons to 48.0 million on normal growing conditions. Higher-yielding varieties continue to replace older varieties, offsetting the decline in area planted. Exports are projected up nearly 100,000 tons to 1.0 million on higher shipments to Indonesia, Philippines, and Thailand driven by ample exportable supply and low domestic prices. Imports are projected up nearly 20,000 tons to 105,000 on recovering New Zealand production.

EU production is projected down 1.1 million tons to 11.0 million on poor pollination and damaging spring frosts in top-producer Poland. Exports are forecast unchanged at 950,000 tons despite lower production as shipments to Egypt rebound from last year's 6-year low. Imports are expected to rise nearly 40 percent to 350,000 tons to compensate for lower production.

U.S. production is projected down nearly 150,000 tons to 4.9 million after last year's bumper crop but remains above the 10-year average. USDA's National Agricultural Statistics Service (NASS) surveyed industry and published a U.S. forecast for apple production in the August 2024 *Crop Production* report. Exports are forecast down nearly 10 percent to 820,000 tons on lower production. Imports are forecast up slightly to 90,000 tons, the second lowest level in 40 years, as the volume of apples in cold storage remains elevated compared to normal levels.

Turkey production is forecast down 600,000 tons to 4.2 million due to insufficient winter chill hours, dry weather, and a shortage of irrigation water. This is the second year of declining production after Turkey reached a record level in 2022/23. Exports are forecast up slightly to 330,000 tons as export-oriented growers were less impacted by the adverse weather conditions.

India production is projected up more than 100,000 tons to 2.6 million as a short winter and limited rainfall during the delicate flowering and fruit-setting stages led to a strong harvest. Imports are forecast up 10 percent to 600,000 tons as shipments continue to grow from last year's record, including a strong start from the United States. Driven by production growth and significant imports, domestic consumption is forecast at 3.0 million tons, a record level for the third year in a row.



South Africa production is forecast mostly unchanged at 1.3 million tons as growers continue to invest in alternative energy sources to supplement the unreliable electric grid and hail nets instead of expanding acreage. Exports are anticipated to rise 30,000 tons to 710,000 on increased shipments to India in addition to its traditional African and European markets.

Chile production is forecast mostly unchanged at 920,000 tons as high yields from sufficient winter rainfall and chill hours offset decreased acreage. In line with production, exports are forecast up only slightly to 535,000 tons. Last year, Brazil surpassed Colombia as the top market for Chile apple exports for the first time.

New Zealand production is forecast to rise 35,000 tons to 563,000, the highest level in 5 years, as orchards fully recover from Cyclone Gabrielle damage in February 2023 and greater seasonal labor availability is anticipated to assist with the harvest. Exports are projected up 12 percent to 380,000 tons.

FRESH TABLE GRAPES

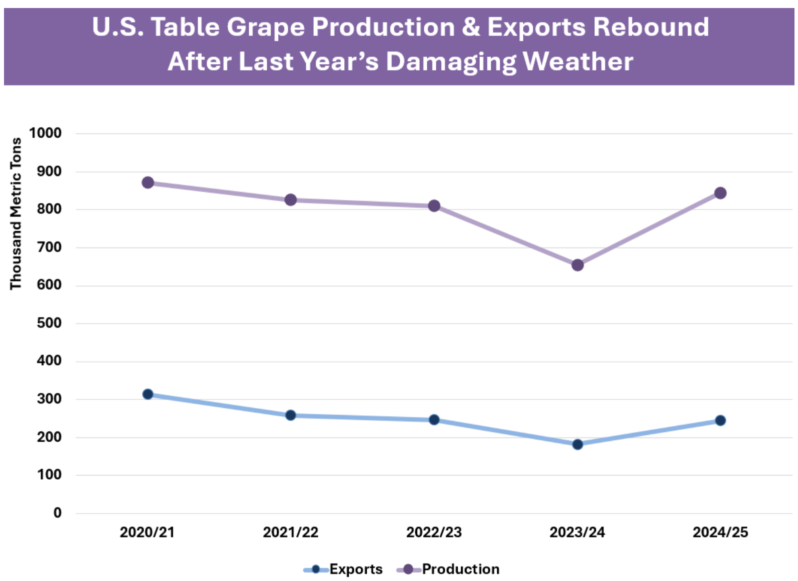
World table grape production for 2024/25 is forecast up nearly 1.0 million tons to 28.9 million as higher volumes in China, India, and the United States more than offset losses in the European Union. Exports are projected up nearly 400,000 tons to 3.9 million on greater shipments from Peru and China.

China production is forecast up 700,000 tons to 14.2 million as new varieties and favorable weather conditions lead to higher yields. Exports are forecast up 100,000 tons to 600,000 as increased exportable supplies combine with improved quality and lower prices. Imports are forecast up slightly to 125,000 tons on greater Southern Hemisphere supplies.

India production is forecast to rise more than 100,000 tons to 3.1 million on adequate soil moisture from the monsoon and improved farming techniques. Exports are expected to rise more than 20,000 tons to 335,000 as depreciation of the Indian rupee facilitates the movement of the higher production volumes to neighboring countries and the European Union.

Turkey production is projected up nearly 100,000 tons to 2.0 million but remains below the 5-year average as downy mildew disease continues to negatively impact production. Exports are forecast up slightly to 150,000 tons on the partial recovery in production.

EU production is forecast down more than 200,000 tons to 1.1 million, the lowest level in at least 2 decades. In Italy, the crop was damaged by temperature swings and heavy rain while Greece experienced drought during the summer harvest. Domestic consumption is forecast 10 percent lower at 1.6 million tons despite an expected increase in imports to 630,000 tons. Exports are forecast down slightly to 115,000 tons, the lowest level since 2015/16, on lower exportable supplies.



U.S. production is projected up nearly 200,000 tons to 845,000 as California makes a full recovery from last year's damage from Hurricane Hilary. NASS surveyed industry and published a U.S. forecast for table grapes production in the August 2024 *Crop Production* report. Higher supplies are expected to push exports up 35 percent to 245,000 tons. Imports are forecast down more than 30,000 tons to 760,000 on greater domestic production, but the United States is expected to remain the top table grape importer. In July 2024, USDA approved three regions in Chile to export table grapes to the United States via a systems approach instead of methyl bromide fumigation which should allow higher quality grapes to reach the U.S. market.

Peru production is forecast up 15,000 tons to 790,000 on recovered production in northern Peru after El Niño conditions limited the industry's growth last year. Higher supplies are expected to drive exports up nearly 20 percent to 620,000 tons, nearly matching the record level seen in 2022/23.

Chile production is forecast up 45,000 tons to 728,000 as higher yields from favorable weather more than offset declining area planted. Exports are expected to rise by the same volume to reach 570,000 tons.

South Africa production is projected mostly unchanged at 365,000 tons as declining area planted is offset by more efficient varieties coming into production. In line with production, exports are expected to remain steady at 335,000 tons as producers continue to face logistical issues at the Port of Cape Town.

Australia production is forecast up 35,000 tons to 230,000, the second largest harvest on record due to excellent bud burst and favorable weather conditions. Exports are anticipated to rise 26 percent to 135,000 tons on higher exportable supplies, but lower demand from China keeps the level well below the peak achieved in 2019/20.

FRESH PEARS

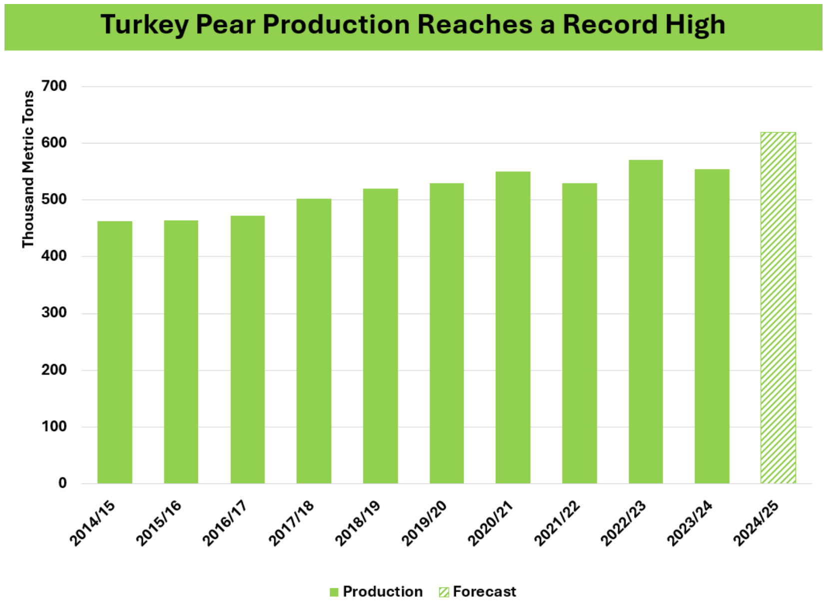
World pear production for 2024/25 is forecast up nearly 400,000 tons to 25.9 million as gains in China more than offset weather-related losses in the United States. Exports are anticipated to rise more than 60,000 tons to 1.9 million on improved shipments from China and Turkey.

China production is forecast up 350,000 tons to 20.2 million as a bumper crop in top-producer Hebei more than offsets damage from high temperatures in other provinces. This is the sixth consecutive year of production growth despite declining acreage due to negative returns, aging farmers, and government policies aimed at converting orchards to grain production. Exports are projected up nearly 10 percent to 660,000 tons due to the record high domestic production. Imports are forecast up slightly to 15,000 tons.

EU production is expected to rise approximately 60,000 tons to 1.9 million tons as a recovery in Italy more than offsets weather and disease related declines in Belgium, the Netherlands, and Spain. However, production remains below the 5-year average. Exports are forecast down slightly to 290,000 tons on low volumes of Dutch and Belgian Conference pears that are an important segment of the export market. Imports are projected down 12 percent to 160,000 tons as recovering domestic production, especially in Italy, reduces demand for imported pears.

Argentina production is forecast mostly unchanged at 655,000 tons as farmers are unable to expand acreage and the industry continues to consolidate due to rising production costs. Exports are forecast down slightly to 330,000 tons but remain above the 5-year average.

Turkey production is forecast up 65,000 tons to 620,000 as good weather conditions lead to record production. Exports are projected up 20,000 tons to 80,000 on recovering domestic production. However, the industry remains focused on the domestic market with only 13 percent of production expected to be exported.



South Africa production is forecast up slightly to 540,000 tons as a cold winter and sufficient water for irrigation are likely to improve yields. Exports are projected up 10,000 tons to 280,000 on increased exportable supplies.

U.S. production is forecast down more than 100,000 tons to 470,000 as poor growing conditions in all three producing states lead to the smallest harvest in nearly 60 years. NASS surveyed industry and published a U.S. forecast for pear production in the August 2024 *Crop Production* report. As a result of the historically low production volumes, domestic consumption and exports are anticipated to fall to 465,000 and 85,000 tons, respectively. Imports are projected up slightly to 80,000 tons.

Chile production is projected to rise slightly to 207,000 tons as favorable weather conditions improve yields, more than offsetting lower area planted and stalling the decade-long trend of falling production. Exports are forecast up 5 percent to 110,000 tons on the moderate increase in exportable supplies.

Future Releases and Contact Information

For additional information, please contact Stephanie Galbraith at (771) 221-5954 or stephanie.galbraith@usda.gov

The next release of this circular is scheduled for December 17, 2025. Note: Starting in 2025, USDA/FAS will no longer publish a semi-annual version of this circular. Publication of the annual circular will continue, and estimates will remain available in PSD Online. To receive the circular via email, go to https://public.govdelivery.com/accounts/USDAFAS/subscriber/new. Please visit https://fas.usda.gov/data/search?recent_report_type=10259&reports%5B0%5D=report_commodities%3A13288&reports%5B1%5D=report_type%3A10259 to view archived reports.

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

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

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

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

HS Codes:
The following harmonized codes are used for compiling trade data:

- 080610 – table grapes
- 080810 – apples
- 080830 – pears

Marketing Years:

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

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

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

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

(1,000 Metric Tons)

	2019/20	2020/21	2021/22	2022/23	2023/24	Dec 2024/25
Production						
China	42,425	44,066	45,973	44,500	46,500	48,000
European Union	11,480	11,935	12,266	12,728	12,090	11,009
United States	4,852	4,511	4,438	4,394	5,030	4,888
Turkey	3,620	4,300	4,493	4,968	4,750	4,150
India	2,370	2,300	2,300	2,400	2,410	2,550
Iran	2,241	2,768	1,990	1,990	1,990	1,990
Russia	1,779	1,540	1,641	1,742	1,844	1,600
South Africa	991	1,164	1,250	1,200	1,300	1,320
Ukraine	1,115	1,279	1,129	1,129	1,129	1,129
Brazil	983	1,297	1,047	1,047	1,047	1,047
Other	6,811	6,540	6,107	6,210	6,231	6,294
Total	78,666	81,700	82,634	82,307	84,321	83,976
Domestic Consumption						
China	41,487	43,033	45,051	43,821	45,677	47,105
European Union	10,659	11,175	11,448	11,931	11,396	10,409
United States	4,098	3,844	3,822	3,883	4,210	4,158
Turkey	3,412	4,013	4,096	4,572	4,432	3,821
India	2,250	2,400	2,577	2,550	2,796	2,979
Russia	2,455	2,259	2,216	2,094	2,150	1,910
Iran	1,423	1,812	1,083	1,444	1,081	1,305
Brazil	1,028	1,250	1,142	1,165	1,277	1,187
Mexico	1,017	973	899	1,042	1,161	1,117
Ukraine	1,114	1,273	1,081	1,098	1,085	1,086
Other	9,189	9,097	8,994	8,497	8,609	8,495
Total	78,133	81,131	82,410	82,096	83,874	83,570
Imports						
India	194	377	448	360	544	600
Iraq	405	406	455	341	452	370
European Union	378	325	331	238	256	350
Russia	763	796	587	362	316	320
United Kingdom	320	330	328	278	328	310
Vietnam	233	278	299	302	315	305
Mexico	257	260	266	232	345	300
Saudi Arabia	195	174	179	199	214	220
United Arab Emirates	171	175	211	190	219	205
Thailand	172	194	190	176	164	180
Other	3,338	3,061	3,206	2,718	2,759	2,713
Total	6,425	6,375	6,502	5,397	5,913	5,873
Exports						
China	1,042	1,102	997	774	911	1,000
European Union	1,199	1,084	1,149	1,035	950	950
United States	861	775	721	611	898	820
South Africa	509	589	625	607	680	710
Iran	818	956	907	546	908	685
Chile	660	644	603	469	530	535
New Zealand	400	356	341	309	340	380
Turkey	209	288	398	396	319	330
Serbia	206	185	165	110	157	160
Moldova	217	150	253	123	127	130
Other	476	506	428	470	403	433
Total	6,596	6,634	6,587	5,450	6,224	6,133

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

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

(1,000 Metric Tons)

	2019/20	2020/21	2021/22	2022/23	2023/24	Dec 2024/25
Production						
China	10,800	11,450	11,980	12,750	13,500	14,200
India	2,280	2,300	2,900	2,850	2,950	3,068
Turkey	2,050	2,220	1,857	2,220	1,919	1,995
Uzbekistan	1,607	1,695	1,761	1,761	1,761	1,761
Egypt	1,385	1,170	1,470	1,560	1,573	1,593
Brazil	1,436	1,748	1,451	1,451	1,451	1,451
European Union	1,548	1,374	1,422	1,543	1,311	1,090
United States	905	871	826	811	655	845
Peru	645	685	713	766	775	790
Chile	785	665	793	656	683	728
Other	1,302	1,293	1,294	1,305	1,327	1,347
Total	24,743	25,471	26,467	27,673	27,904	28,867
Fresh Dom. Consumption						
China	10,677	11,215	11,810	12,537	13,120	13,725
India	1,803	1,830	2,285	2,254	2,326	2,413
Turkey	1,845	2,006	1,595	1,997	1,778	1,846
Uzbekistan	1,487	1,566	1,537	1,523	1,642	1,611
European Union	1,872	1,766	1,854	1,945	1,784	1,605
Egypt	1,248	1,027	1,328	1,392	1,400	1,410
Brazil	1,394	1,677	1,406	1,385	1,409	1,398
United States	1,252	1,227	1,281	1,310	1,265	1,360
Russia	308	369	405	549	330	429
Mexico	273	272	266	304	260	296
Other	2,159	2,212	2,202	2,083	2,150	2,235
Total	24,318	25,166	25,969	27,279	27,464	28,328
Imports						
United States	672	670	713	746	793	760
European Union	501	572	604	574	599	630
Russia	288	351	380	518	302	400
United Kingdom	275	269	271	258	267	265
Canada	189	191	184	178	176	190
Thailand	131	140	103	136	134	160
Vietnam	113	147	99	140	136	160
Indonesia	94	101	100	105	117	150
Mexico	91	98	103	130	111	130
Bangladesh	60	106	130	97	104	125
Other	1,006	931	905	795	682	722
Total	3,418	3,577	3,592	3,676	3,422	3,692
Exports						
Peru	400	468	540	622	529	620
China	362	428	351	389	499	600
Chile	605	526	608	496	529	570
India	185	267	275	283	313	335
South Africa	284	322	336	283	333	335
United States	325	314	258	247	182	245
Mexico	224	207	196	209	238	220
Egypt	150	155	150	170	175	185
Turkey	205	215	264	227	142	150
Uzbekistan	120	129	224	238	119	150
Other	680	639	540	581	475	482
Total	3,540	3,669	3,741	3,745	3,532	3,892

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

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

(1,000 Metric Tons)

	2019/20	2020/21	2021/22	2022/23	2023/24	Dec 2024/25
Production						
China	17,314	17,815	18,876	19,260	19,850	20,200
European Union	2,059	2,373	1,847	2,092	1,807	1,868
Argentina	640	615	557	654	658	655
Turkey	530	550	530	571	555	620
South Africa	438	461	540	508	530	540
United States	653	610	601	587	602	470
India	310	308	310	300	313	313
Russia	290	247	240	235	230	230
Japan	198	206	223	223	223	223
Chile	222	233	223	212	202	207
Other	586	483	563	575	508	526
Total	23,241	23,902	24,509	25,217	25,478	25,852
Domestic Consumption						
China	16,707	17,345	18,404	18,867	19,257	19,555
European Union	1,823	2,172	1,684	1,848	1,693	1,738
Turkey	479	477	436	482	495	540
United States	594	577	559	558	569	465
Russia	436	446	422	455	425	430
India	327	330	338	328	342	348
Argentina	300	301	283	339	323	325
South Africa	212	214	253	267	260	260
Japan	197	205	222	222	222	222
Indonesia	236	196	215	151	200	215
Other	1,754	1,527	1,628	1,649	1,610	1,662
Total	23,067	23,789	24,445	25,164	25,394	25,760
Imports						
Indonesia	236	196	215	151	200	215
Russia	194	241	183	220	195	200
Brazil	138	121	133	159	165	160
European Union	172	175	186	140	182	160
Vietnam	133	97	101	96	131	140
United Kingdom	100	105	103	112	100	105
Hong Kong	76	81	77	80	90	85
Belarus	119	112	78	108	75	80
Mexico	84	73	72	80	82	80
United States	72	75	69	71	76	80
Other	509	473	503	481	477	521
Total	1,832	1,749	1,719	1,696	1,772	1,826
Exports						
China	619	480	482	410	605	660
Argentina	340	315	275	315	335	330
European Union	407	377	349	384	297	290
South Africa	227	247	287	241	270	280
Chile	114	127	116	105	105	110
United States	130	109	110	100	110	85
Turkey	51	73	94	89	60	80
Belarus	16	54	27	56	38	40
Korea, South	31	19	24	30	19	25
Hong Kong	7	6	4	9	6	7
Other	16	15	15	12	11	12
Total	1,959	1,821	1,784	1,749	1,856	1,919

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