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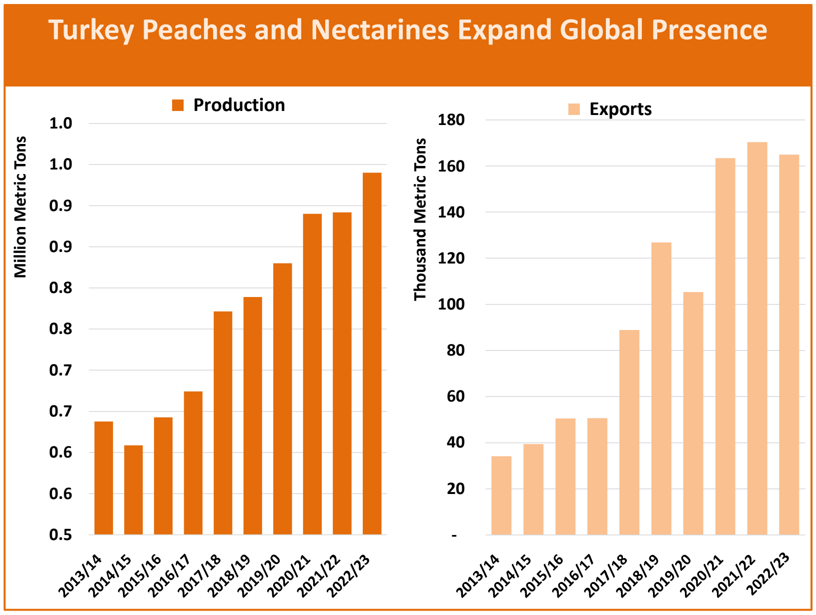
Fresh Peaches and Cherries: World Markets and Trade

Turkey Peach and Nectarine Prospects Continue to Ripen

Turkey is the world's third largest producer of peaches and nectarines and surpassed the European Union in 2021/22 to become the world's leading exporter.



Peaches and nectarines are primarily grown in the coastal provinces of Bursa, Canakkale, Izmir, and Mersin, with peaches accounting for nearly 80 percent of production. Between 2001/02 and 2011/12, output was fairly stable, averaging 500,000 metric tons (tons). Production jumped to over 600,000 for the first time in 2012/13 and has not declined since 2015/16.

Expanding output has been driven in large part by the rising popularity of nectarines among both domestic and foreign market consumers. Peach acreage has contracted slightly the last 10 years but has been offset by increasing nectarine acreage, keeping the total combined planted area nearly unchanged. Peach and nectarine growers have also been improving orchards, replacing older varieties with newer high-yield varieties, resulting in yield rising nearly 30 percent over the last decade. Growers have also adopted the practice of high-density plantings, using new cultivars and rootstocks, and installing modern tree-training systems. These changes have been in part propelled by government programs that provide support for various costs including for fuel, fertilizer, and saplings. This has improved output and yield such that production is forecast to exceed 900,000 tons for the first time in 2022/23, rising to 940,000. If realized, this would be an increase of 150,000 tons within 5 years.

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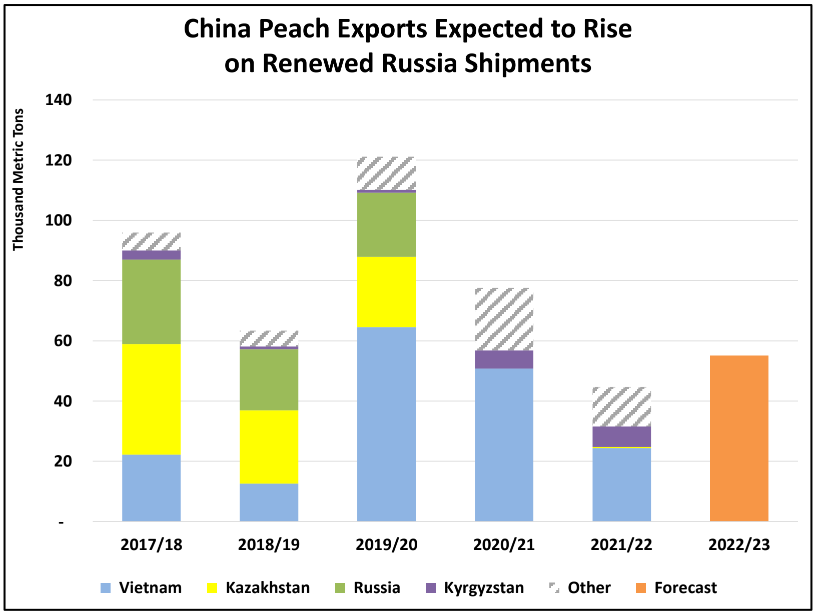
Domestic consumption continues to account for the vast majority of domestic use, consumed fresh but also processed, especially in juices and nectars. Exports remained at or below 8 percent of production up until 2016/17; however, as with production, 2015/16 was a watershed year for exports. In 2015/16, volumes rose nearly 30 percent to over 50,000 tons and subsequently doubled within 3 years, accounting for 16 percent of production. Exports have grown almost non-stop since then, except for a decline in 2019/20 marked by reduced exports to key Middle East markets, and are projected to account for 18 percent of production in 2022/23.

In 2021/22, Turkey became the top exporter for the first time, ousting the European Union from the leading role it had held for decades. The European Union has experienced 3 consecutive years of crop-damaging weather, particularly in top producer and exporter Spain, sharply reducing EU export supplies. But Turkey's efforts to improve production have placed it in a position to remain the top supplier in 2022/23, accounting for over 20 percent of world exports.

In the last 5 years, Russia was Turkey's top market, accounting for over 65 percent of exports on average, but Turkey has expanded its global presence, gaining 13 new markets during this time for a total of 57 markets in 2021/22. In further efforts to expand exports, Turkey's Aegean Exporters' Association is working with the Aegean University to better control pesticide usage with the intent to increase shipments to the European Union, its second largest market. Total exports are forecast to ease slightly in 2022/23 to 165,000 tons, but shipments are expected to rise in the future as new plantings come online.

Fresh Peach and Nectarine 2022/23 Highlights

World peach and nectarine production in 2022/23 is forecast to edge up 1.0 million tons to 23.7 million on rising output by China, European Union, and Turkey, the world's top producers. Exports are expected to be nearly unchanged as higher shipments from Uzbekistan and China offset lower EU and U.S. trade.



China production is projected up 800,000 tons to 16.8 million due to higher yields on good growing conditions, especially in southern China. However, planted area continues to shrink as declining market returns encourage growers to switch to more profitable crops, including cherries. Exports are forecast to rebound due largely to the resumption of shipments to Russia. Russia banned fresh fruit imports from China, including stone fruit, due to pest concerns in August 2019, lifting restrictions in February 2022. Renewed shipments to Russia are expected to help boost exports 10,000 tons to 55,000. Imports are also anticipated to rebound to a record 43,000 tons on higher shipments from Chile in the beginning of the marketing year (January-December).

EU production is forecast to improve to 3.1 million tons as supplies in France and Greece rebound from last year's weather damage, more than offsetting significant losses in top grower Spain. Aragon and Catalonia experienced intense cold and severe frosts in April and May, dropping Spain's output by 30 percent. With the majority of EU exports sourced from Spain, EU shipments are likewise expected to contract, down 12,000 tons to 125,000. Reduced output is expected to boost imports 7,000 tons to 50,000.

Turkey production is forecast up 48,000 tons to 940,000, an eighth straight year of growth, driven largely by growing nectarine supplies. Peach acreage accounts for the majority of growing area and output, but acreage has remained relatively stable since 2012/13. Nectarine acreage is steadily growing, spurred by an increasing consumer preference for nectarines in domestic and foreign markets. Despite higher supplies, exports are forecast to contract slightly to 165,000 tons on reduced shipments to Russia.

U.S. production is expected to drop over 100,000 tons to 605,000 due to late winter and early spring freezes impacting crops in the top three growing states of California, South Carolina, and

Georgia. U.S. production has halved since 2010/11, and is forecast at the lowest level since at least 1982/83 (the earliest year within the USDA Production, Supply and Distribution database). Reduced supplies are anticipated to pressure exports lower to 70,000 tons, while imports are up to 35,000 tons, mostly from Chile where output is up.

Chile production is expected to continue its long upward trend, rising to 180,000 tons on favorable growing conditions and improved winter rainfall. Rising nectarine output continues to outpace peach production as growers expand nectarine acreage in response to higher nectarine returns. Exports are forecast up 8,000 tons to 120,000 on higher production.

Russia imports are forecast down 20,000 tons to 230,000 as reduced shipments from Turkey are only partially offset by gains from Uzbekistan and renewed supplies from China. Despite this second straight year of declines, Russia remains the top importer and normally accounts for 30 percent of world trade.

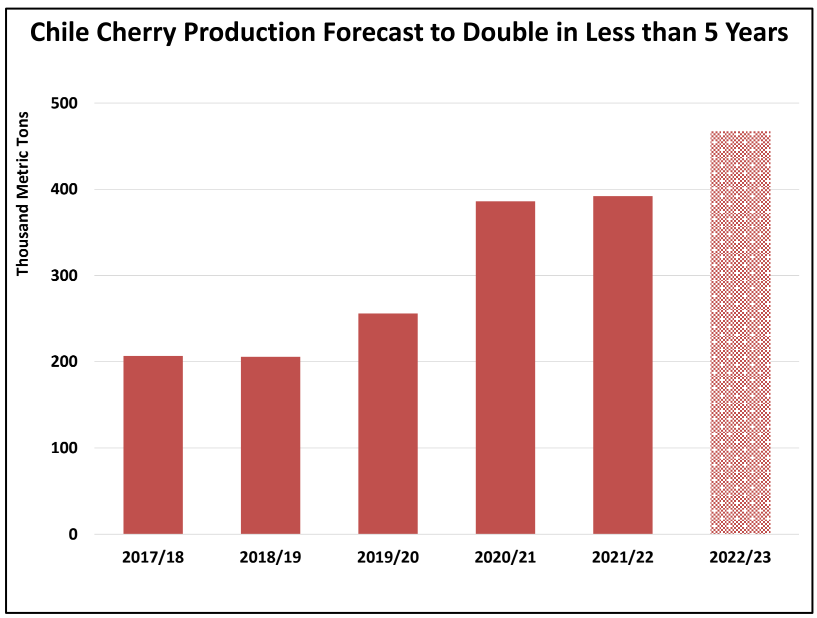
Fresh Cherry 2022/23 Highlights

World cherry production in 2022/23 is forecast up over 220,000 tons to 4.7 million largely on surging output in Turkey and Chile. Greater supplies are expected to lift imports slightly to 630,000 tons on higher shipments to the European Union and China.

Turkey production is expected to rebound from last year's weather-damaged crop, surging over 100,000 tons to 980,000 as yields rise on favorable weather conditions and good rainfall. Though planted area has been declining for several years, this is being offset by growers replanting orchards with high-density and high-yield varieties. Exports are forecast up 9,000 tons to 80,000 on higher supplies, lifting Turkey past the United States yet again to become the second largest exporter behind Chile.

EU production is anticipated to see a recovery from last year's adverse growing conditions, rising 60,000 tons to 727,000 as good growing conditions in Poland, Italy, and Greece offset heat and drought-induced losses in Spain, Portugal, and Hungary. Consumption is expected to rebound 80,000 tons to over 770,000 propelled by improved domestic supplies and higher imports. Greater shipments from Turkey and Chile are forecast to boost imports to a record 60,000 tons. Exports are expected to contract again to 15,000 tons as markets remain limited following Russia's 2014 ban of certain EU agricultural production, including fruit.

Chile production is forecast up almost 20 percent to 467,000 tons as higher rainfall and good growing conditions during the winter boosts yields. Acreage is also up as new plantings continue to come online. Higher supplies are expected to drive exports over 50,000 tons to 410,000. The vast majority is still likely to be shipped to China, but exporters are working to diversify markets, such as Vietnam. Shipments to Vietnam commenced in 2021/22 after gaining market access in October 2020. Processing capacity is becoming a concern in the face of increasing output, as the industry works to improve the speed and efficiency of post-harvest processing to ensure fruit quality remains consistently high.



China production is forecast up 50,000 tons to 650,000. The leading province of Shandong suffered significant losses due to higher temperatures and drought during pollination, but this is expected to be offset by gains in northwestern and southwestern provinces on good growing conditions and new trees coming online. Planted area continues to expand as good market conditions have encouraged growers to expand existing growing areas and to plant orchards in provinces with little or no current cherry output. Imports are projected slightly higher after last year's small decline, rising to 330,000 tons on greater supplies in Chile.

U.S. production is projected down 68,000 tons to 347,000, the lowest level since 2008/09. Gains in tart cherries are more than offset by reduced sweet cherry supplies in Washington, Oregon, and California due to combinations of cold, frost, and rain. Exports are forecast to drop to their lowest level since 2002/03, falling 35,000 tons to 42,000 on reduced output. Imports are expected to rise to a record 25,000 tons on greater shipments from Chile during the U.S. off-season.

Russia imports are projected down for a second straight year, sliding 18,000 tons to 90,000 as lower shipments from Uzbekistan more than offset gains from Turkey and Serbia.

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To download additional data tables, go to Production, Supply and Distribution Database (PSD Online): (https://apps.fas.usda.gov/psdonline/app/index.html#/app/downloads), click on the tab PSD Reports, and click on Fruits and Vegetables.
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For the Global Agricultural Information Network (Agricultural Attaché Reports):
https://gain.fas.usda.gov/#/
For Global Agricultural Trade System (U.S. Exports and Imports):
https://apps.fas.usda.gov/gats/default.aspx

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

Marketing Years:

- **Peaches/Nectarines -** Northern Hemisphere countries are on a January-December year. Southern Hemisphere countries are on a November-October year indicated as the first year of the split year.
- **Cherries** - Northern Hemisphere countries are on an April-March year. Southern Hemisphere countries are on a November-October year indicated as the first year of the split year.

Peaches and Nectarines, Fresh: Production, Supply and Distribution in Selected Countries

(1,000 Metric Tons)

	2017/18	2018/19	2019/20	2020/21	2021/22	Sep 2022/23
Production						
China	14,300	13,500	15,800	15,000	16,000	16,800
European Union	4,346	3,881	4,066	3,224	2,876	3,120
Turkey	772	789	830	890	892	940
Iran	526	611	591	664	664	664
United States	758	687	709	687	706	605
Argentina	90	226	210	222	222	222
Brazil	250	220	183	202	202	202
Uzbekistan	193	162	189	184	184	184
Chile	159	158	165	160	171	180
Mexico	164	161	159	173	173	173
Other	696	658	614	598	600	616
Total	22,253	21,053	23,516	22,004	22,688	23,706
Domestic Consumption						
China	14,213	13,458	15,706	14,959	15,989	16,788
European Union	3,991	3,652	3,801	3,058	2,776	3,043
Turkey	683	663	725	727	722	775
Iran	514	596	557	564	597	599
United States	742	656	675	657	655	570
Russia	278	264	231	324	289	270
Argentina	86	222	208	217	220	220
Mexico	184	192	190	195	212	213
Brazil	269	241	196	214	212	210
South Africa	166	136	124	142	143	144
Other	988	897	1,038	934	856	852
Total	22,115	20,976	23,450	21,993	22,670	23,683
Imports						
Russia	250	228	194	286	250	230
United Kingdom	86	74	93	63	57	60
Iraq	35	40	82	76	59	55
European Union	19	27	24	39	43	50
Kazakhstan	45	48	58	53	32	50
China	9	22	27	37	33	43
Canada	34	37	39	41	41	40
Mexico	22	31	32	23	40	40
Saudi Arabia	33	34	38	49	39	35
United States	40	38	36	31	33	35
Other	277	187	247	227	163	140
Total	849	765	870	926	789	778
Exports						
Turkey	89	127	105	163	170	165
European Union	344	227	259	180	137	125
Chile	97	97	102	99	112	120
Uzbekistan	38	54	56	86	56	75
United States	55	69	71	61	83	70
Iran	12	16	35	100	67	65
China	96	63	121	78	45	55
Jordan	59	50	70	54	59	50
South Africa	19	18	21	32	31	30
Serbia	44	24	22	24	18	20
Other	104	68	42	37	24	24
Total	957	812	906	912	802	799

Note: The marketing year begins in January of the first year for Northern Hemisphere countries and November of the first year for Southern Hemisphere countries.

Cherries (sweet and sour), Fresh: Production, Supply and Distribution in Selected Countries

(1,000 Metric Tons)

	2017/18	2018/19	2019/20	2020/21	2021/22	Sep 2022/23
Production						
Turkey	809	824	846	914	874	980
European Union	620	835	738	653	667	727
China	380	340	450	520	600	650
Chile	207	206	256	386	392	467
United States	508	441	422	352	415	347
Russia	224	279	292	306	306	306
Iran	249	214	253	286	286	286
Uzbekistan	194	229	241	256	256	256
Ukraine	243	303	236	238	238	238
Serbia	119	147	114	181	181	181
Other	205	233	217	227	218	224
Total	3,757	4,050	4,066	4,318	4,432	4,660
Domestic Consumption						
China	571	520	680	856	918	980
Turkey	749	749	766	827	803	900
European Union	643	851	770	688	692	772
Russia	292	372	378	418	414	396
United States	410	366	347	298	359	330
Iran	247	212	238	259	265	275
Ukraine	239	300	233	239	240	239
Uzbekistan	166	201	224	224	195	229
Serbia	102	133	98	164	169	171
Belarus	16	49	36	63	63	62
Other	299	285	259	252	274	295
Total	3,735	4,037	4,029	4,286	4,392	4,648
Imports						
China	192	180	230	336	319	330
Russia	68	93	85	112	108	90
European Union	46	43	50	53	44	60
Canada	33	28	28	26	32	30
United States	14	12	10	13	21	25
Korea, South	19	19	15	17	19	20
Taiwan	15	12	12	13	14	20
United Kingdom	16	15	13	14	16	20
Iraq	10	14	15	12	10	15
Kazakhstan	22	25	8	18	29	10
Other	20	22	14	13	14	10
Total	454	462	480	624	626	630
Exports						
Chile	185	180	229	353	356	410
Turkey	60	75	81	88	71	80
United States	112	87	84	67	77	42
Uzbekistan	28	28	17	32	61	27
Azerbaijan	15	24	27	30	20	20
European Union	23	27	18	15	19	15
Iran	2	2	16	27	20	11
Serbia	21	16	17	18	12	10
Canada	11	13	9	7	10	9
Argentina	4	4	6	6	5	5
Other	15	19	14	12	16	13
Total	476	475	516	654	667	642

Note: The marketing year begins in April of the first year for Northern Hemisphere countries and November of the first year for Southern Hemisphere countries. Fresh cherries includes sweet and sour cherries.