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Report Highlights:

The outlook for the 2022/23 apple season in New Zealand is much more optimistic with the opening of international borders following COVID-19 restrictions. While the last two apple harvests were severely impacted by the lack of labor, the return of overseas workers under the Recognized Seasonal Employer (RSE) scheme is expected to help allow a recovery in production, with the forecast up 12 percent from the previous year's estimated crop. Exports are also expected to rise from the lowest level in seven years. In addition to the larger crop, an improvement in logistics and shipping could also support exports, although export volumes are still expected to remain below the record export levels reached in the years prior to COVID-19. Expansion in apple area has largely stagnated, however with a greater emphasis from growers on profitability, older less valuable varieties have continued to be replaced with newer varieties more in demand from export markets.

Executive Summary:

The outlook for the 2022/23 apple season in New Zealand is much more optimistic with the opening of international borders following COVID-19 restrictions. While the last two apple crops were severely impacted by the lack of harvest labor, the return of overseas workers under the Recognized Seasonal Employer (RSE) scheme is expected to help allow a recovery in production, which is forecast at 573,000 metric tons (MT), up 12 percent from the previous year's estimated crop. Exports are also expected to rise to 385,000 MT, from only 340,000 MT in 2021/22 (which was the lowest level in seven years). In addition to a larger crop, an improvement in export logistics and shipping is also expected to support exports, although export volumes are still expected to remain below the record levels reached in the years prior to COVID-19. Expansion in apple area has largely stagnated, however with a greater emphasis from growers on profitability, older less valuable varieties have continued to be replaced with newer varieties more in demand from export markets.

The 2021/22 season has been challenging for New Zealand apple and pear growers as well as exporters. Community spread of the COVID-19 Omicron variant coincided with the peak harvest period, compounding existing labor shortages, and resulting in some apple blocks being left unharvested. In Hawke's Bay, the main growing region, there was also severe climatic conditions in spring and over the harvest period which also impacted yield. Exports were impacted not just by fewer apples, but continued delays to shipping schedules and shortages of refrigerated containers, which impacted shipments.

Note: The GAIN Marketing Year (MY) is the same as the calendar year (CY), January 1 to December 31. For the purpose of this report always refer to MY unless otherwise stated.

Background

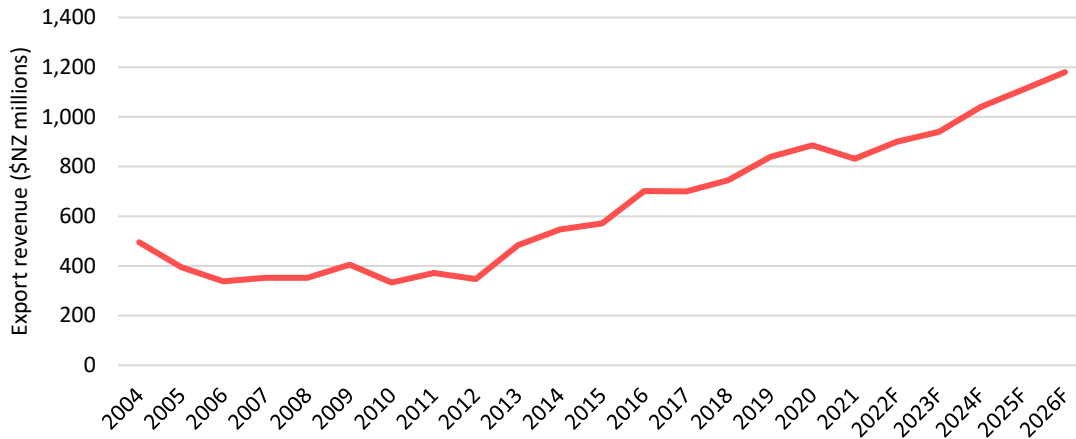
New Zealand is one of the largest apple exporters globally and New Zealand's climate and soils make it well suited for growing apples and pears. Key growing regions such as Hawkes Bay, Nelson, and Central Otago experience necessary conditions for growing apples, such as sufficient winter chilling, warm springs, long sunshine hours in summer and dry growing areas. These areas also have reliable water resources to irrigate orchards, and as a result almost all commercial orchards rely on irrigation. The harvest season starts in January and finishes in June, with peak harvest for apples from March to May. New Zealand also has well established ports close to its apple and pear regions. Located in the Hawkes Bay - Napier is the largest exporting port handling 58 percent of exports so far in 2022 (Figure 1), followed by Tauranga (16 percent), which is also located in the North Island. The ports of Nelson (14 percent) and Dunedin (six percent) are both located near growing areas in the South Island. Since 2012, New Zealand export revenue from apple and pear exports have climbed, and New Zealand's Ministry of Primary Industries (MPI) expects this trend to continue (see Figure 2).

Figure 1: Apple and Pear Exports from New Zealand Ports January to September 2022



Source: TDM, FAS/Wellington, base map from d-maps.com

Figure 2: Apples & pears Export revenue \$NZ millions



Source: MPI, Note: F=Forecast

Apples

Planted and Harvested Areas

2022/23

After steady and strong expansion in apple area for a number of years, this expansion has largely stagnated as a result of impacts of COVID-19 on the industry. However, despite this slowdown, replanting of older blocks with newer varieties is continuing. Industry feedback has highlighted that now a far greater influence is being placed on planting for orchard profitability. As a result, many older but productive blocks of varieties like Braeburn which have low profitability have been replaced by newer varieties, which will take a few seasons to being fruiting. In the establishment of newer blocks, new production and trellising systems are being used, as well as considerations with the regards to the integration of any future advancements such as robotic pickers.

The New Zealand Government has released two National Policy Statements (NPS) in recent years that could impact deciduous fruit operations. The first is the NPS for Fresh Water, which is important for the majority of apple and pear producers due to the widespread use of irrigation on the majority of all commercial operations. This policy requires regional councils to review rules and consents for water flows and levels, and what the environmental impact of each Farm Management Unit has on the environment of surrounding water bodies. In the short term, the apple industry does not view that future rules would impact the scale of operations, but may require more in-depth data collection and reporting for orchard operations. The second policy is the NPS for Highly Productive Land, which is a legislative change that has been welcomed by the horticultural industry. The national guidelines mean local councils will need to have a plan in place that will help to contain the urban sprawl that is being experienced in some regions. It does not mean that land cannot be rezoned for housing, but it does mean that a considered approach will need to be taken. The ultimate effect of this legislation on perennial crop areas is not yet clear.

2021/22

Based on recent surveys done by NZ Apples and Pears, it appears that the impacts of the pandemic have resulted in a severe slowdown in apple area expansion in the 2021/22 year. Previously, area had been expanding at almost three percent a year. This slowdown was a result of the lack of labor as well as poor profitability for the New Zealand apple industry. However, as mentioned, the replanting of older low-value blocks with newer varieties has continued or even accelerated. This is because with the lack of sufficient harvest labor, some of these older blocks were left unharvested, motivating apple producers to begin the replanting process with more profitable varieties.

Production

2022/23

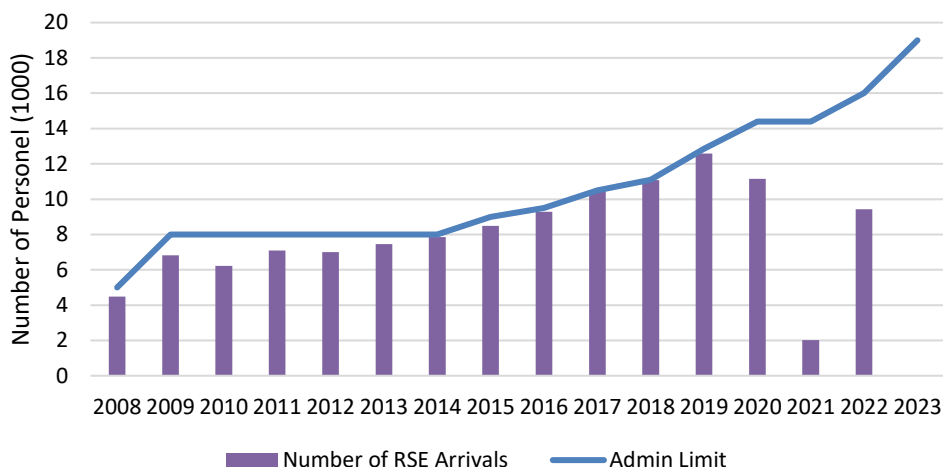
FAS/Wellington is projecting a recovery in apple production in 2022/23 from the last two years to 573,000 MT, up sharply from the revised estimate of 513,000 MT in 2021/22. This recovery is based on expectations for improved harvest labor availability, especially through the Recognized Seasonal Employer (RSE) scheme, which would sharply reduce the number of unpicked apples. In addition, with the expansion in apple area in past years, these trees starting to come into strong production should also support yields.

Labor availability has had a substantial impact on the national horticultural industry during the past two seasons, as foreign labor was constrained by Government border restrictions due to the COVID-19 pandemic. However, the industry is currently more optimistic about the outlook for labor availability this season. Following the loosening of border restrictions, availability overall is viewed to be improving. Horticulture labor is typically sourced from three main areas:

- Recognized Seasonal Employer (RSE) scheme: This is a government policy that allows the horticulture and viticulture industries to recruit workers from overseas for seasonal work when there are not enough local workers. These are typically from countries in the Pacific and is a vital component to apple harvest labor. While pre-COVID, the number of RSE arrivals typically always reached the cap allowed in the program (see Figure 3), with the border restrictions in recent years the number of arrivals fell far short of the allowable level. In September 2022, the cap or admin limit was lifted for the 2022/2023 season to 19,000 people, from 16,000 (see Figure 3), and optimism is high the horticultural industries will fill the full limit now that borders are open.
- A second common source of labor are visitors to New Zealand on working holiday visas ('backpackers'). Typically, the seasonality of work and provision of accommodation is appealing to them for horticultural work. However, there remains uncertainty to how many backpackers will return to New Zealand in the short-term. In addition, there is strong competition with other industries that are also recovering such as hospitality and tourism.
- Domestic labor is the third source of labor, which was heavily relied upon during the last two years with the border restrictions. However, with the current unemployment rate in New Zealand at around only three percent as of August 2022, industry does not feel this pool will be as reliable. This is especially the case as the competition for staff nationally in all industries

continues to be fierce, and seasonal work is not particularly perceived as appealing to many New Zealanders.

Figure 3: Annual Recognized Seasonal Employer Scheme Arrivals



Source: NZ Immigration

Although production is expected to recover in 2022/23, it is still forecast to be below the record reached in 2019/20 of 591,200 MT. With expanded areas of past years coming into full production, typically record levels of production would be expected each year. However, two key factors are anticipated to continue to limit the production recovery. The first is that although labor availability is expected to improve through the RSE scheme, uncertainty around ‘backpacker’ labor could continue to constrain labor availability. The second is that weather conditions and forecasts could impact on apple yields. Spring 2022 has been an extremely difficult one so far in both the Hawke’s Bay and Gisborne regions with regular high rainfall events. While this early in the season it is not expected to have an impact on yield, continued heavy rain could impact the crop similar to last harvest. With a third consecutive La Niña forecast by the National Institute of Water and Atmospheric Research (NIWA), this could result in unfavorable weather at harvest. For the primary growing regions in New Zealand such as Napier, Nelson and Central Otago, this weather pattern typically can result in more humid and stormy weather (Figure 4), which if experienced during February to April, would have adverse impact on crop yields.

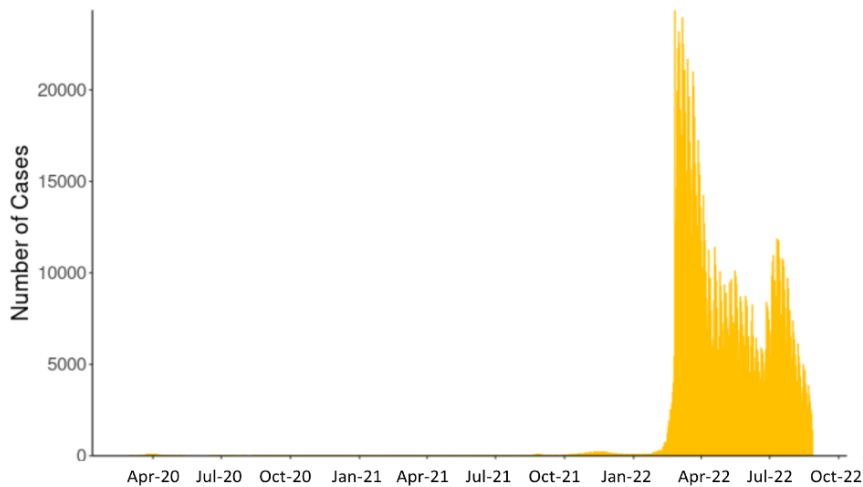
2021/22

2021/22 apple production is revised down to 513,000 MT, which would be the smallest crop since 2013/14. This is primarily due to labor shortages at harvest, with in many instances of fruit not even being picked. In addition, yield was impacted by very poor climatic growing conditions brought on by the La Niña weather pattern.

On March 24th, in the middle of the harvest seasons, the border Managed Isolation and Quarantine (MIQ) systems ceased, and borders began to reopen to the world. This followed nearly two years of

strict two-week MIQ for all returning NZ citizens and residents. This opening meant businesses could scramble to source RSE workers in order to complete the seasons harvest, but for many it was too late to have much of an impact. In addition, unfortunately, this timing coincided with an explosion of the COVID-19 variant Omicron in the community at peak harvest (Figure 4), which strained the already stretched labor market even further.

Figure 4 – New Zealand COVID-19 Cases



Source: Ministry of Health

During this time, in order to recover as much harvest as possible many growers and post-harvest operations started collaborating and sharing staff. However, these efforts still resulted in many instances where fruit physically could not be harvested and would remain on the trees.

In addition to the labor shortage, the La Niña weather was an immense challenge for harvest yield. With apples and pears favoring long sunshine days and dry climate leading into harvest, Napier/Hawke’s Bay and Gisborne experienced very wet and humid conditions, delaying harvest. This resulted in some apple crops in these regions not being able to be picked, as well as other apples with quality issues of not getting sufficient color to meet acceptable export grades. The Nelson region, although it had a much more favorable season, still had long lasting damage to some trees from the previous year’s hailstorms.

Industry Innovations

Most automation or technology being designed and implemented in horticulture is for the purpose of managing labor limitations more effectively. Other innovations are also aimed at improving decision making and fruit quality management. Packhouses are investing in camera technology for grading and robotics for packing, stacking, and palletizing. In recent years growers have made large investments in platform technology in an effort to make the orchard jobs easier and more efficient. There is still much research and development into robotic picking, although widespread use of this technology seems to be some way off.

Consumption

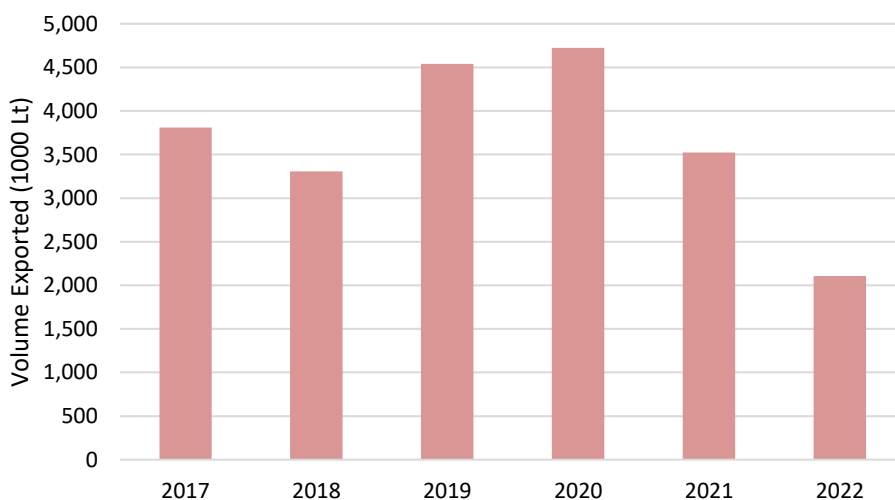
FAS/Wellington forecasts total apple domestic consumption in 2022/2023 to be 188,300 MT, a nearly nine percent increase on 2021/2022 as a result of higher expected processing volumes. Fresh consumption is expected to remain steady (typically around 74,000 MT - just over 14 percent of the total crop produced), but processing volumes are anticipated to rebound as a result of increased labor availability. Because of the acute shortage of harvest labor last year, priority was given to picking export-quality blocks, and many blocks that would have gone into processing were instead left unpicked.

FAS/Wellington has revised down the total apple domestic consumption in 2021/2022 to 173,150 MT, four percent less than 2020/2021. Although domestic consumption is estimated to have remained steady, this fall is because of less-than-expected processing volumes in light of many apples that were not export quality and which normally would have gone for processing, instead being left unpicked.

A range of apple products are produced in New Zealand such as juice, juice concentrates, diced and sliced apples, apple puree, and apple paste. Most of these products are for export, and the major product is apple juice, with typically about six to seven million liters being exported annually. Australia and the United States are the largest markets for New Zealand apple juice. Approximately 1.2 million liters are imported annually, two-thirds of which comes from China.

An illustration of the sharp reduction in processing volumes in light of COVID-19-impacted harvest labor shortages in the past two years can be seen in the severe slowdown in apple juice exports from New Zealand. In the first nine months of 2022, exports were only 2.1 million liters, far less than half the volume during the same period in 2020 (Figure 5).

Figure 5: New Zealand Apple Juice Exports to the World (January to September)



Source: TDM

In terms of domestic consumption, New Zealand is similar to most of the world and is currently experiencing increasing inflationary pressure. In the third quarter of 2022 it was at 7.2 percent, which is still the highest it has been this millennium. As interest rates continue to rise as well as fuel prices, fruit and vegetable produce prices at the supermarket have risen from September 2021 to September 2022 by 16 percent ([Stats NZ](#)), and increases are expected to continue into 2023. As a result, consumer discretionary spending is anticipated to dictate market demand for fresh produce, globally and domestically. Most of the higher value apples in New Zealand are exported, with the lower grades for the domestic market. Despite price increases, domestic apple consumption volumes are anticipated to remain steady.

The New Zealand Government is currently working on legislation to phase out hard to recycle and single use plastics, such as produce labels and bags. The intended policy was to stop the use of plastic produce bags and produce labels that are not compostable at home in New Zealand by mid-2023. However, imports would be exempt until mid-2025, and exports can still use plastic produce labels. Some producers in New Zealand have already implemented steps into the compostable labels and packaging for their produce. However, although the biodegradable stickers have been less of an issue for industry, biodegradable adhesives for labels that can perform through the storage and transport process continue to be problematic. As a result, the Government has said the label's adhesive may be industrially compostable until mid-2025, when it will need to be home compostable.

Trade

Exports

2022/23

FAS/Wellington is forecasting a recovery for apple exports to 385,000 MT in 2022/23, an increase of 13 percent from the revised 2021/22 estimate of 340,000 MT. This export recovery is a result of a larger expected harvested crop in light of greater harvest labor availability, as well as expectations of some normality returning to the supply chain and export logistics. Two-thirds of the New Zealand apple crop is expected to be exported as fresh apples.

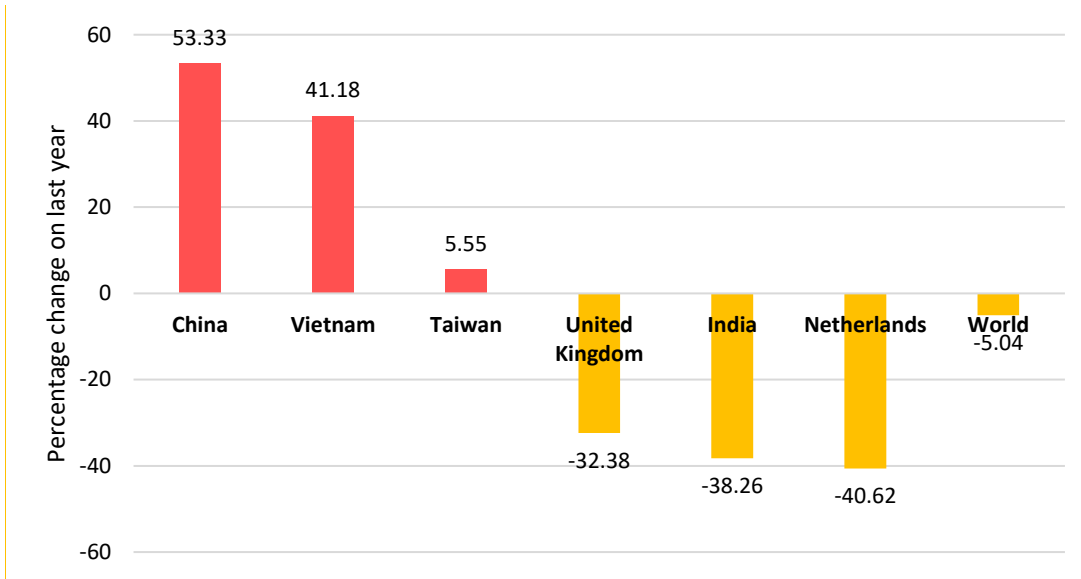
2021/22

FAS/Wellington has revised down the 2021/22 export estimate to 340,000 MT, the lowest level since 2014/15 as a result of sharply lower exports during the first nine months of the year (Note: due to the seasonality of exports, January-September exports typically account for 98 percent of annual exports). The supply of exports has been constrained by the major factors as already outlined in this report including harvest labor shortages, poor weather around harvest, and supply chain disruptions, which resulted in lower yields and apples being left on the trees.

Although overall exports are down, shipments by destination have been mixed. There has been very strong demand from Asian markets, in particular China, Vietnam, and Taiwan (Figure 6 and 7). Chinese demand has been extremely strong in recent years, and in 2022 about 16 percent of New Zealand apple

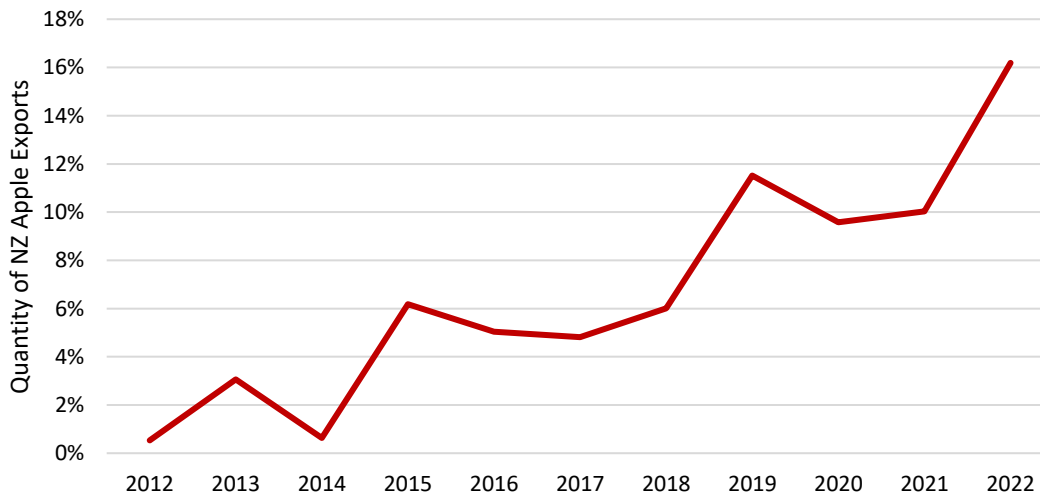
exports went to China. However, the decline of availability of lower-priced apple varieties such as Braeburn, which typically go to European countries, has resulted in a sharp drop in exports to markets like the United Kingdom and the Netherlands (Figure 6).

Figure 6: January to September Apple Exports Destination (2021 vs 2022)



Source: TDM

Figure 7: Proportion of Exports to China of NZ Apples



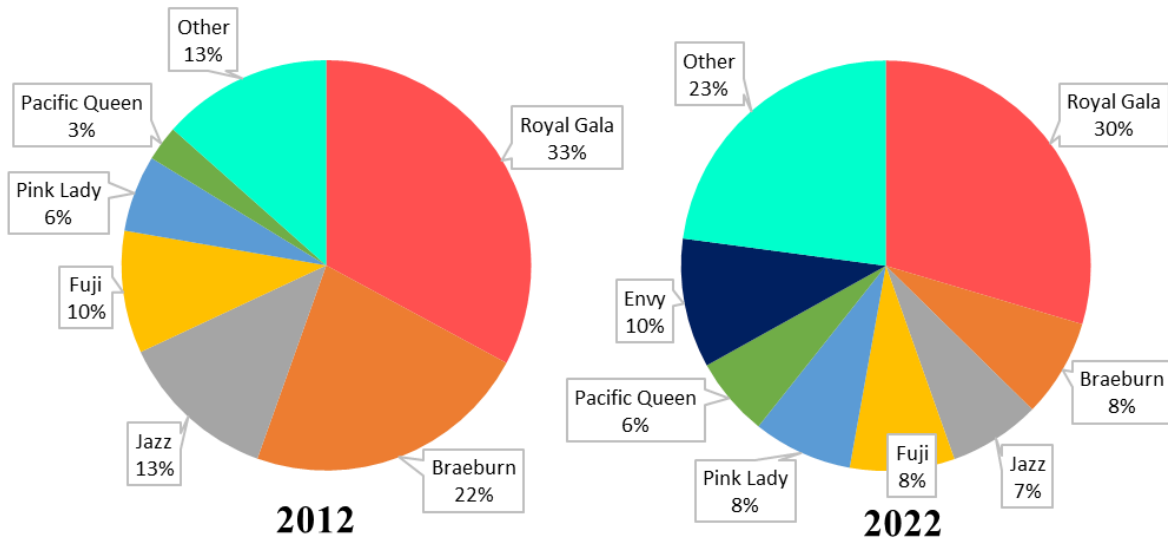
Source: TDM

The most popular apple variety for export continues to be Royal Gala (Figure 8), accounting for about one-third of exports. Envy, Pink Lady, Fuji and Braeburn are the next largest. There has been a large shift, however, in the last decade away from varieties like Braeburn and into new varieties, especially

suited for Asian markets, which have higher profitability (see Figure 9). As mentioned earlier in this report, the last two years has seen a big push by producers to focus on orchard profitability.

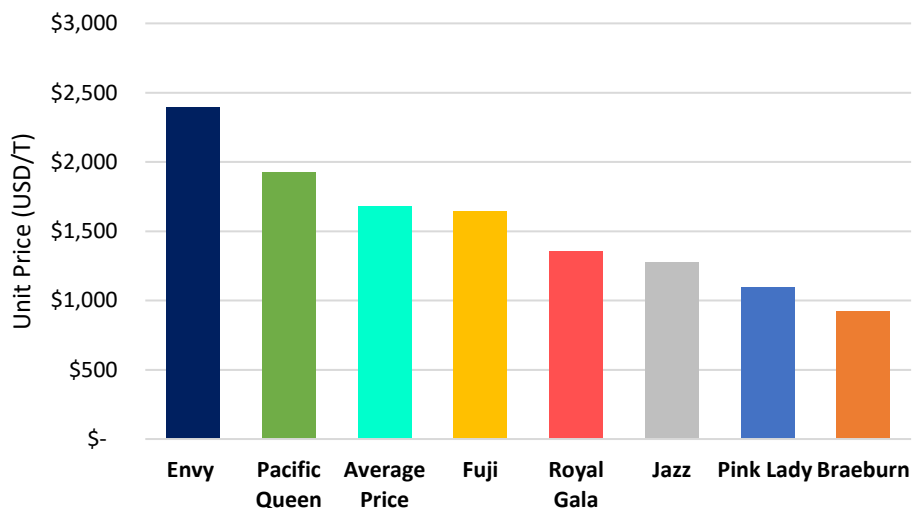
New locally developed variety Rockit continues to expand its market share. This miniature apple is being exported globally, marketed as a snack-sized apple in cylindrical packaging. Some varieties such as Red Delicious have nearly disappeared as a result of a shift into apples more in demand by Asian markets.

Figure 8: Apple Export by Variety 2012 vs 2022



Source: TDM

Figure 9: 2022 Apple Export Unit Price by Variety



Source: TDM

| New Zealand Exports Statistics for Apples | | | | | | | | |
|---|-----------------------------|----------------|----------------|----------------|----------------|----------------------------|----------------|--------------|
| Destination Country | Quantity (MT) Calendar Year | | | | | January-September QTY (MT) | | |
| | 2017 | 2018 | 2019 | 2020 | 2021 | 2021 | 2022 | %Δ 2022/21 |
| China | 16,586 | 22,171 | 45,015 | 38,406 | 35,860 | 35,574 | 54,544 | 53.33 |
| Vietnam | 13,311 | 18,149 | 25,874 | 31,965 | 33,459 | 32,411 | 45,758 | 41.18 |
| United Kingdom | 49,237 | 44,665 | 43,299 | 39,449 | 32,443 | 32,443 | 21,939 | -32.38 |
| Taiwan | 23,673 | 22,437 | 20,858 | 26,901 | 29,222 | 29,084 | 30,699 | 5.55 |
| India | 9,667 | 25,787 | 17,068 | 22,272 | 27,953 | 27,522 | 16,992 | -38.26 |
| United States | 38,220 | 40,462 | 33,883 | 28,494 | 24,561 | 24,561 | 23,850 | -2.89 |
| Thailand | 23,605 | 18,654 | 32,890 | 23,406 | 21,106 | 19,887 | 21,000 | 5.6 |
| Germany | 18,147 | 30,808 | 24,447 | 28,626 | 20,555 | 20,555 | 20,398 | -0.76 |
| Netherlands | 31,090 | 29,100 | 20,175 | 17,210 | 16,351 | 16,351 | 9,709 | -40.62 |
| Russia | 8,168 | 8,152 | 8,992 | 21,443 | 15,611 | 15,611 | 3,922 | -74.88 |
| Rest of the World | 113,226 | 109,004 | 118,441 | 123,016 | 100,660 | 96,848 | 84,357 | -12.90 |
| World Total | 344,930 | 369,389 | 390,942 | 401,188 | 357,781 | 350,847 | 333,168 | -5.04 |

Source: TDM

Supply Chain

Supply chain issues have continued this past year. Freight prices are falling globally post pandemic, but most New Zealand exporters are yet to see any material decrease in shipping prices. Exporters continue to experience delays in shipping services as congestion at international ports disrupt shipping schedules. Vessel calls to more regional ports such as Napier and Nelson have been sporadic and now attracting larger vessels less frequently. Some export analysts expect shipping to not return to pre-pandemic levels for another 12 months. Continued delays in the shipping schedules and global shortage of refrigerated shipping containers added to the pressures this season in regard to exports.

Trade Policy

During the first half of 2022, New Zealand concluded negotiations on two separate Free Trade Agreements (FTA), one with the United Kingdom (UK) and one with the European Union (EU). The purpose of these FTAs is to provide tariff relief and/or expanded quotas for a number of New Zealand agricultural products including horticulture, seafood, dairy, and meat products. It is expected that signatures of these FTAs will take place in 2023, and domestic formal approval of the agreements to likely occur in 2024. Despite these FTAs, it is expected that New Zealand apple exports will continue to be focused on nearby Asian markets.

The proposed quotas are:

- **UK:**
 - Tariffs eliminated entry into force for trade between January and July

- Duties removed over three years in four equal reductions, for trade between August and December. Which a 20,000-tonne duty free quota will operate until all tariffs are eliminated.

➤ **EU:**

- Tariffs will be eliminated from day one on apples, with savings of NZ\$1.3 million (US\$740,000) per annum.

Imports

FAS/Wellington is forecasting imports for 2022/2023 to be at 300 MT. New Zealand imports very limited quantities of apples, primarily from the United States. With the development of atmosphere controlled cool stores to keep local fruit within a couple of months of the next harvest, this has reduced the demand for fresh apple imports. For 2021/2022, the import estimate is revised down to 150 MT due to almost no imports so far this year. It is likely that supply chain and shipping costs and issues have constrained imports this year, but improvement in the import supply chain next year could spur a return to more typical import levels.

| New Zealand Import Statistics for Apples (Source: TDM) | | | | | | | | |
|--|-----------------------------|------------|------------|------------|------------|----------------------------|-----------|---------------|
| Origin Country | Quantity (MT) Calendar Year | | | | | January-September QTY (MT) | | |
| | 2017 | 2018 | 2019 | 2020 | 2021 | 2021 | 2022 | %Δ 2022/21 |
| United States | 414 | 152 | 467 | 489 | 265 | 134 | 0 | -100.00 |
| New Zealand | 43 | 0 | 150 | 149 | 86 | 86 | 21 | -75.58 |
| Poland | 0 | 12 | 0 | 0 | 0 | 0 | 0 | 0 |
| Italy | 25 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| World Total | 482 | 164 | 617 | 638 | 351 | 220 | 21 | -90.45 |

Source: TDM

| Apples, Fresh Market Year Begins New Zealand | 2020/2021 | | 2021/2022 | | 2022/2023 | |
|--|---------------|----------|---------------|----------|---------------|----------|
| | Jan 2021 | | Jan 2022 | | Jan 2023 | |
| | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| Area Planted (HA) | 11000 | 11000 | 11000 | 11000 | 0 | 11000 |
| Area Harvested (HA) | 10200 | 10200 | 10300 | 10300 | 0 | 10300 |
| Bearing Trees (1000 TREES) | 0 | 0 | 0 | 0 | 0 | 0 |
| Non-Bearing Trees (1000 TREES) | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Trees (1000 TREES) | 0 | 0 | 0 | 0 | 0 | 0 |
| Commercial Production (MT) | 535000 | 535000 | 550000 | 510000 | 0 | 570000 |
| Non-Comm. Production (MT) | 3000 | 3000 | 3000 | 3000 | 0 | 3000 |
| Production (MT) | 538000 | 538000 | 553000 | 513000 | 0 | 573000 |
| Imports (MT) | 400 | 351 | 300 | 150 | 0 | 300 |
| Total Supply (MT) | 538400 | 538351 | 553300 | 513150 | 0 | 573300 |
| Domestic Consumption (MT) | 180600 | 180551 | 178300 | 173150 | 0 | 188300 |
| Exports (MT) | 357800 | 357800 | 375000 | 340000 | 0 | 385000 |
| Withdrawal From Market (MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Distribution (MT) | 538400 | 538351 | 553300 | 513150 | 0 | 573300 |
| (HA) ,(1000 TREES) ,(MT) | | | | | | |

Pears

Planted and Harvested Areas

As already discussed, a far greater influence is being placed on planting for orchard profitability, both in apples and pears. As a result, pear growers are waiting for market normality and more profit signals before any area expansion begins again, and area is expected to remain relatively steady.

Production

Total pear production for 2022/2023 is forecast at 12,200 MT, a six percent improvement on the 11,500 MT estimated for 2021/2022 year. This is a result of the expected improvement in labor supply at harvest following the removal of border restrictions.

Consumption

FAS/Wellington forecasts total pear domestic consumption to increase to 13,200 MT for 2022/2023, which is up slightly from the 2021/2022 estimate. This is a result of the larger expected harvest.

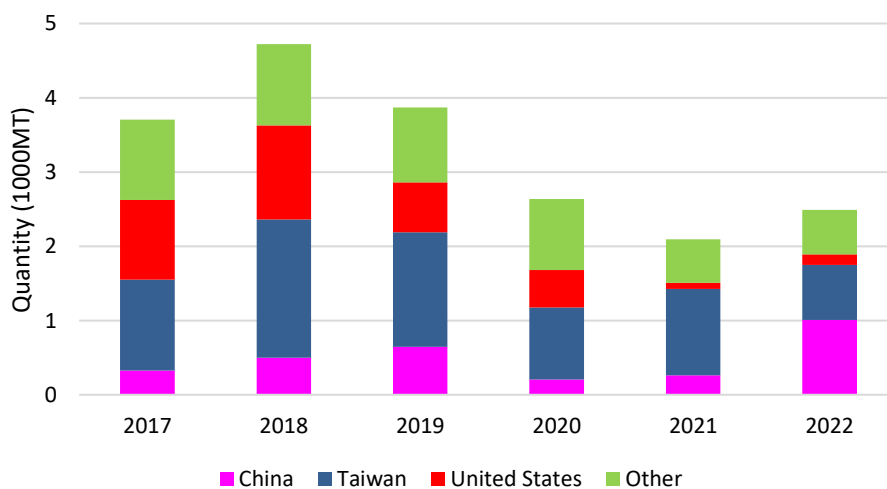
Trade

Exports

For the 2022/23 season, FAS/Wellington forecasts New Zealand’s pear exports to rise to 3,000 MT, 20 percent higher than the previous year. This is as a result of the larger expected harvest as well as improvement to export logistics and shipping after COVID-19 disruptions.

Despite a fall in apple exports so far this year, pear exports (although only a fraction the size of apple exports) have actually expanded (see Figure 10). Pears to China is showing the greatest growth (and representing 40 percent of total exports) and Taiwan is also remaining a strong consumer (30 percent of total exports).

Figure 10: January to September Pear Exports by Country



Source: TDM

| New Zealand Export Statistics for Pears | | | | | | | | |
|---|-----------------------------|--------------|--------------|--------------|--------------|----------------------------|--------------|--------------|
| Destination Country | Quantity (MT) Calendar Year | | | | | January-September QTY (MT) | | |
| | 2017 | 2018 | 2019 | 2020 | 2021 | 2021 | 2022 | %Δ 2022/21 |
| Taiwan | 1,226 | 1,865 | 1,540 | 969 | 1,165 | 1,165 | 743 | -36.22 |
| China | 326 | 497 | 647 | 206 | 261 | 261 | 1,007 | 285.82 |
| Tonga | 122 | 106 | 98 | 128 | 132 | 116 | 34 | -70.69 |
| Singapore | 117 | 50 | 72 | 69 | 85 | 85 | 71 | -16.47 |
| United States | 1,072 | 1,264 | 673 | 503 | 81 | 81 | 140 | 72.84 |
| Fiji | 101 | 137 | 199 | 126 | 79 | 73 | 120 | 64.38 |
| Indonesia | 2 | 21 | 18 | 41 | 57 | 57 | 19 | -66.67 |
| French Polynesia | 83 | 68 | 90 | 97 | 53 | 50 | 58 | 16.00 |
| New Caledonia | 11 | 38 | 29 | 22 | 53 | 50 | 40 | -20.00 |
| Russia | 0 | 0 | 0 | 20 | 41 | 41 | 44 | 7.32 |
| Rest of the World | 725 | 766 | 568 | 519 | 130 | 116 | 214 | 84.48 |
| World Total | 3,785 | 4,812 | 3,934 | 2,700 | 2,137 | 2,095 | 2,490 | 18.85 |

Source: TDM

Imports

FAS/Wellington forecasts 2022/23 imports to be 4,000 MT, steady with the 2021/22 estimate. New Zealand's demand for fresh pears outstrips the national production, and New Zealand is a net importer of pears. Australia is by far the largest supplier of pears to New Zealand, followed by China.

| New Zealand Import Statistics for Pears (Source: TDM) | | | | | | | | |
|---|-----------------------------|--------------|--------------|--------------|--------------|----------------------------|--------------|---------------|
| Origin Country | Quantity (MT) Calendar Year | | | | | January-September QTY (MT) | | |
| | 2017 | 2018 | 2019 | 2020 | 2021 | 2021 | 2022 | %Δ 2022/21 |
| Australia | 3,171 | 2,707 | 2,822 | 2,947 | 3,373 | 2,158 | 1,524 | -29.38 |
| China | 718 | 500 | 576 | 864 | 860 | 415 | 340 | -18.07 |
| United States | 572 | 359 | 455 | 464 | 167 | 0 | 0 | 0 |
| South Korea | 93 | 84 | 97 | 73 | 58 | 20 | 0 | -100.00 |
| Ecuador | 0 | 0 | 0 | 24 | 0 | 0 | 0 | 0 |
| Italy | 4 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| World Total | 4,558 | 3,650 | 3,950 | 4,372 | 4,458 | 2,593 | 1,864 | -28.11 |

Source: TDM

| Pears, Fresh Market Year Begins New Zealand | 2020/2021 | | 2021/2022 | | 2022/2023 | |
|---|---------------|----------|---------------|----------|---------------|----------|
| | Jan 2021 | | Jan 2022 | | Jan 2023 | |
| | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| Area Planted (HA) | 375 | 375 | 375 | 375 | 0 | 375 |
| Area Harvested (HA) | 330 | 330 | 345 | 345 | 0 | 360 |
| Bearing Trees (1000 TREES) | 0 | 0 | 0 | 0 | 0 | 0 |
| Non-Bearing Trees (1000 TREES) | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Trees (1000 TREES) | 0 | 0 | 0 | 0 | 0 | 0 |
| Commercial Production (MT) | 10550 | 10550 | 11300 | 11300 | 0 | 12000 |
| Non-Comm. Production (MT) | 100 | 100 | 200 | 200 | 0 | 200 |
| Production (MT) | 10650 | 10650 | 11500 | 11500 | 0 | 12200 |
| Imports (MT) | 4500 | 4500 | 4000 | 4000 | 0 | 4000 |
| Total Supply (MT) | 15150 | 15150 | 15500 | 15500 | 0 | 16200 |
| Domestic Consumption (MT) | 13050 | 13050 | 13000 | 13000 | 0 | 13200 |
| Exports (MT) | 2100 | 2100 | 2500 | 2500 | 0 | 3000 |
| Withdrawal From Market (MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Distribution (MT) | 15150 | 15150 | 15500 | 15500 | 0 | 16200 |
| | | | | | | |
| (HA) ,(1000 TREES) ,(MT) | | | | | | |

Attachments:

No Attachments