

Stone Fruit: World Markets and Trade

Cherry and Peach/Nectarine: 2011/12 Forecast Overview

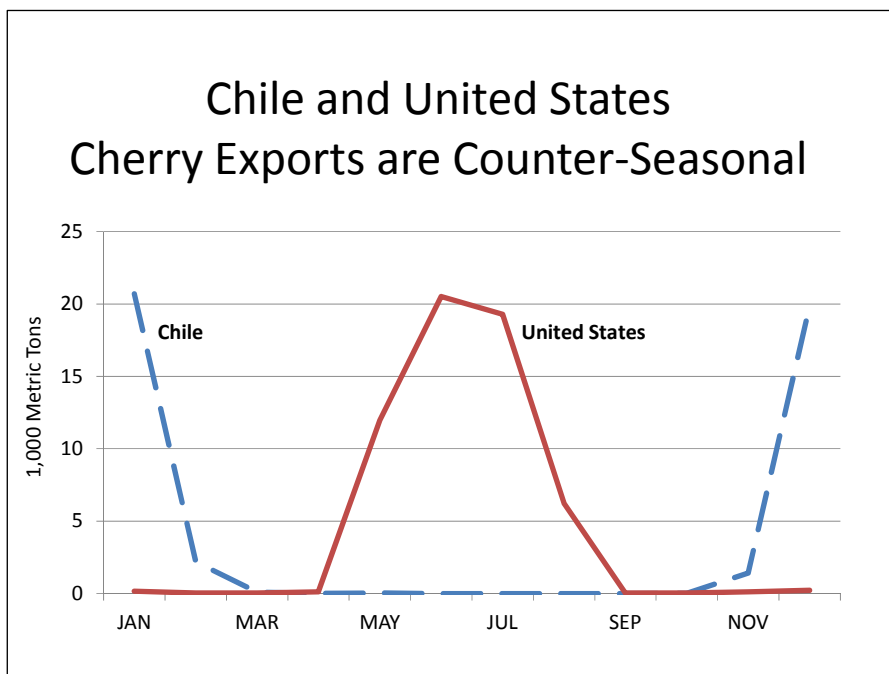
Global Cherry Production and Consumption to Shrink

Global cherry production in 2011/12 is forecast at 1.9 million metric tons (MMT), down 7 percent from last year as Turkey's output plunges 40 percent. Cold and excessively wet spring weather conditions in Turkey hindered the bloom, pollination, and growth. Turkey's precipitous fall far exceeds gains in the United States and the European Union (EU) and is the driving force behind the forecast 10 percent decline in global consumption.

Global exports are forecast nearly unchanged at 223,000 metric tons (MT) and are mostly insulated from the reduced harvest because only about 10 percent of available supplies are exported. Reduced exports from Turkey are more than offset by increases from Chile, the EU, and the United States.

Chile's exports continue to grow due to off-season demand in the United States and China. Since U.S. cherries are counter-seasonal to the Chilean crop, they compliment rather than compete in the marketplace. U.S. exports are forecast up due to higher demand from Canada and Taiwan. With the first shipment in July, U.S. cherries can now be exported to Western Australia, after 10 years of negotiations between USDA, Biosecurity Australia, and

the Western Australia state government. It is expected that this development will result in 30-45 additional MT this year as the season was already underway and up to 150-300 MT annually in future years. Cherries are the first fresh U.S. fruit to gain access to that market. Russia remains the top global import market and is still growing as the EU fills the gap for reduced supply from Turkey.



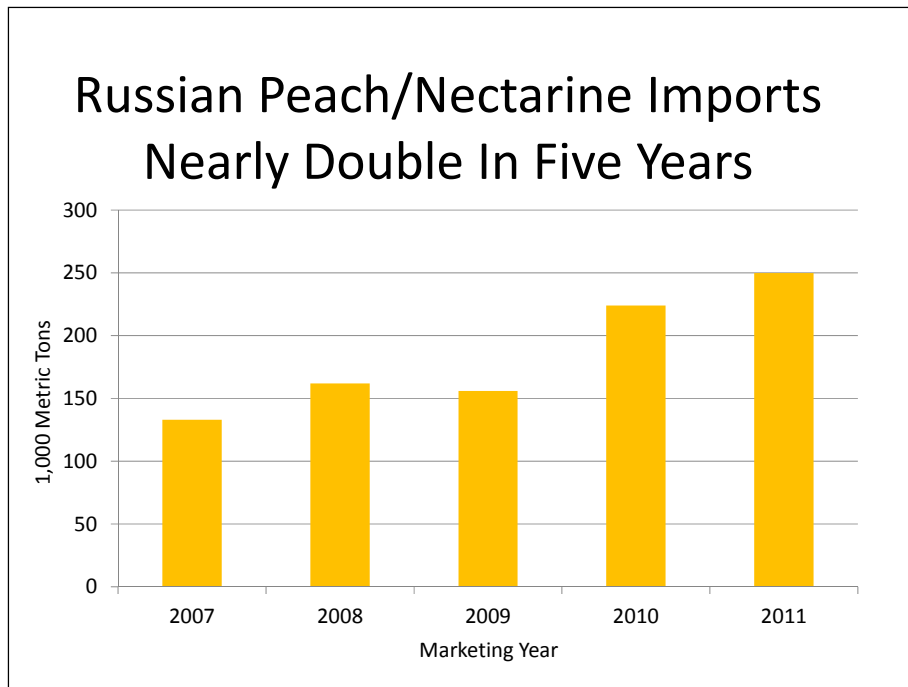
Global Peach/Nectarine Production, Consumption, and Trade Expand

In 2011/12 global peach/nectarine production is forecast at 18.1 MMT, up 10 percent from last season. The rise is mostly due to China, where additional fruit bearing trees combined with larger fruits are expected to boost yields. Production is dominated by China, the EU, and the United States, and these countries consume and process the vast majority of the harvest. Global consumption is forecast to surge as China and the EU expand.

World exports are forecast at 587,000 MT, up 4 percent as the EU supplies more fruit to Russia's surging market.

As the number one market, Russia is expected to continue to grow as a strong ruble and demand raise imports above last year's level.

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Cherries (Sweet and Sour): Production, Supply and Distribution in Selected Countries
(Metric Ton)

Country Mktg Year	Production	Imports	Total Supply	Exports	Fresh Dom. Consumption	For Processing
Argentina						
2007/08	6,800	176	6,976	2,411	4,565	0
2008/09	6,800	24	6,824	2,138	4,686	0
2009/10	5,000	36	5,036	1,758	3,278	0
2010/11	6,800	36	6,836	3,000	3,836	0
2011/12	6,800	36	6,836	3,000	3,836	0
Australia						
2007/08	12,500	1,676	14,176	1,696	12,480	0
2008/09	11,250	2,921	14,171	1,866	12,305	0
2009/10	10,750	2,636	13,386	1,413	11,973	0
2010/11	7,500	2,500	10,000	890	9,110	0
2011/12	11,500	2,550	14,050	2,000	12,050	0
Azerbaijan						
2007/08	6,606	0	6,606	2,735	3,871	0
2008/09	6,845	0	6,845	2,719	4,126	0
2009/10	6,877	0	6,877	3,086	3,791	0
2010/11	5,000	0	5,000	1,642	3,358	0
2011/12	5,000	0	5,000	1,200	3,800	0
Canada						
2007/08	8,784	25,507	34,291	4,763	29,528	0
2008/09	6,967	24,676	31,643	2,465	29,178	0
2009/10	14,569	30,489	45,058	5,558	39,500	0
2010/11	14,000	27,262	41,262	5,206	36,056	0
2011/12	15,000	30,000	45,000	5,000	40,000	0
Chile						
2007/08	61,000	3	61,003	43,730	10,000	7,273
2008/09	59,000	4	59,004	38,427	12,100	8,477
2009/10	50,750	8	50,758	33,071	9,725	7,962
2010/11	77,120	8	77,128	57,600	10,525	9,003
2011/12	83,000	8	83,008	62,000	11,808	9,200
China						
2007/08	150,000	611	150,611	57	149,954	600
2008/09	174,000	3,344	177,344	15	176,329	1,000
2009/10	185,000	6,184	191,184	2	189,982	1,200
2010/11	190,000	11,222	201,222	7	199,865	1,350
2011/12	210,000	28,000	238,000	10	227,990	10,000
EU-27						
2007/08	486,051	60,189	546,240	9,369	360,978	175,893
2008/09	628,364	33,292	661,656	31,201	432,815	197,640
2009/10	724,640	43,855	768,495	30,858	481,815	255,822
2010/11	624,697	42,146	666,843	20,392	442,252	204,199
2011/12	649,700	25,000	674,700	35,000	425,920	213,780
Japan						
2007/08	17,000	8,525	25,525	0	23,025	2,500
2008/09	17,000	8,525	25,525	0	23,025	2,500
2009/10	16,600	10,013	26,613	0	25,113	1,500
2010/11	19,700	11,009	30,709	0	28,959	1,750
2011/12	21,000	9,300	30,300	0	28,450	1,850
Russia						
2007/08	100,000	62,170	162,170	13	162,157	0
2008/09	63,000	60,015	123,015	0	123,015	0
2009/10	69,000	71,580	140,580	0	140,580	0
2010/11	70,000	73,796	143,796	0	143,796	0
2011/12	70,000	75,000	145,000	0	145,000	0
Serbia						
2007/08	28,546	134	28,680	15,945	12,735	0

Cherries (Sweet and Sour): Production, Supply and Distribution in Selected Countries (Continued)
(Metric Ton)

Country Mktg Year	Production	Imports	Total Supply	Exports	Fresh Dom. Consumption	For Processing
2008/09	29,551	153	29,704	8,758	20,946	0
2009/10	29,228	129	29,357	9,562	19,795	0
2010/11	29,000	130	29,130	8,000	21,130	0
2011/12	29,000	130	29,130	9,000	20,130	0
Taiwan						
2007/08	0	10,438	10,438	0	10,438	0
2008/09	0	10,127	10,127	0	10,127	0
2009/10	0	12,229	12,229	0	12,229	0
2010/11	0	8,769	8,769	0	8,769	0
2011/12	0	11,500	11,500	0	11,500	0
Turkey						
2007/08	432,000	10	432,010	57,056	264,954	110,000
2008/09	525,000	0	525,000	50,000	325,000	150,000
2009/10	610,000	0	610,000	52,000	378,000	180,000
2010/11	613,000	0	613,000	65,000	368,000	180,000
2011/12	370,000	0	370,000	46,000	180,000	144,000
United States						
2007/08	390,597	15,276	405,873	51,190	172,793	181,890
2008/09	315,083	24,640	339,723	45,762	138,379	155,582
2009/10	495,345	12,700	508,045	64,664	217,832	225,549
2010/11	361,767	20,195	381,962	58,704	187,189	136,069
2011/12	404,660	20,000	424,660	60,000	194,225	170,435
Total Selected Cherry Countries						
2007/08	1,699,884	184,715	1,884,599	188,965	1,217,478	478,156
2008/09	1,842,860	167,721	2,010,581	183,351	1,312,031	515,199
2009/10	2,217,759	189,859	2,407,618	201,972	1,533,613	672,033
2010/11	2,018,584	197,073	2,215,657	220,441	1,462,845	532,371
2011/12	1,875,660	201,524	2,077,184	223,210	1,304,709	549,265

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

Peaches/Nectarines: Production, Supply and Distribution in Selected Countries
(1,000 Metric Ton)

Country Mktg Year	Production	Imports	Total Supply	Exports	Fresh Dom. Consumption	For Processing
Australia						
2007/08	110	0	110	6	50	54
2008/09	106	0	106	6	50	49
2009/10	98	0	98	5	45	48
2010/11	90	0	90	4	40	46
2011/12	95	0	95	5	45	45
Brazil						
2007/08	186	20	206	0	206	0
2008/09	239	17	256	0	256	0
2009/10	216	17	233	0	233	0
2010/11	220	22	242	0	242	0
2011/12	220	25	245	0	245	0
Canada						
2007/08	32	60	92	1	91	0
2008/09	29	62	91	1	89	0
2009/10	26	49	75	1	74	0
2010/11	26	53	79	1	78	0
2011/12	26	53	79	1	78	0
Chile						
2007/08	175	0	175	105	69	2
2008/09	177	0	177	102	72	4
2009/10	151	0	151	89	58	4
2010/11	161	0	161	100	58	3
2011/12	159	0	159	98	59	3
China						
2007/08	9,015	0	9,015	24	7,855	1,136
2008/09	9,549	0	9,549	26	8,251	1,272
2009/10	10,040	0	10,040	40	8,650	1,350
2010/11	10,515	0	10,515	28	9,187	1,300
2011/12	11,550	0	11,550	42	9,758	1,750
EU-27						
2007/08	4,050	42	4,091	194	3,221	653
2008/09	3,975	43	4,017	196	3,044	777
2009/10	4,086	36	4,122	208	3,015	882
2010/11	3,291	27	3,318	277	2,270	753
2011/12	3,904	30	3,934	300	2,968	649
Japan						
2007/08	157	0	157	1	138	19
2008/09	157	0	157	1	138	19
2009/10	151	0	151	1	131	19
2010/11	137	0	137	0	119	18
2011/12	145	0	145	1	126	19
Mexico						
2007/08	192	29	221	2	220	0
2008/09	202	38	241	1	239	0
2009/10	200	25	225	1	224	0
2010/11	205	31	236	2	234	0
2011/12	205	35	240	0	240	0
Russia						
2007/08	43	133	176	0	176	0
2008/09	27	162	189	0	189	0
2009/10	30	156	186	0	186	0
2010/11	30	224	254	0	254	0
2011/12	30	250	280	0	280	0
Switzerland						
2007/08	0	28	28	0	28	0

Peaches/Nectarines: Production, Supply and Distribution in Selected Countries (Continued)
(1,000 Metric Ton)

Country Mktg Year	Production	Imports	Total Supply	Exports	Fresh Dom. Consumption	For Processing
2008/09	0	30	30	0	30	0
2009/10	0	33	33	0	33	0
2010/11	0	32	32	0	32	0
2011/12	0	32	32	0	32	0
Taiwan						
2007/08	28	38	66	0	66	0
2008/09	30	40	70	0	70	0
2009/10	29	24	53	0	53	0
2010/11	28	27	55	0	55	0
2011/12	33	25	57	0	57	0
Turkey						
2007/08	553	0	553	39	404	110
2008/09	540	0	540	19	409	112
2009/10	547	0	547	32	395	120
2010/11	540	0	540	41	379	120
2011/12	500	0	500	30	350	120
United States						
2007/08	1,269	60	1,329	105	611	612
2008/09	1,285	67	1,352	120	702	530
2009/10	1,182	51	1,232	91	615	526
2010/11	1,237	50	1,287	111	665	511
2011/12	1,210	50	1,260	110	628	522
Total Selected Peach/Necta Countries						
2007/08	15,810	410	16,221	476	13,136	2,585
2008/09	16,316	460	16,776	473	13,541	2,763
2009/10	16,756	390	17,146	468	13,712	2,948
2010/11	16,480	465	16,946	564	13,612	2,751
2011/12	18,078	500	18,577	587	14,866	3,107

Peaches and Nectarines marketing year begins in January of the first year for Northern Hemisphere countries and November for Southern Hemisphere countries.