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Fresh Deciduous Fruit

Annual

2003

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Report Highlights:

Post estimates MY 2003 deciduous fruit production (apples and pears) at 1.6 million metric tons (mmt), a sixteen percent decrease from last year's ten-year record of over 2 mmt. This decrease is due to weather and natural yield oscillations, which remain the determining factors of production. Given the growing incomes of the Russian people, the decline of the Ruble, and the aggressive policies of major fruit exporters, China first of all, Post forecasts a fifteen percent increase in imports of apples to 510,000 metric tons and a three percent increase in pears to 1.25 mmt, the same level as in 2002.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
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Table of Contents

Seed Type Fruit Production	3
Production in Kursk Oblast	3
Production in Volgograd oblast	3
Fruit Consumption	4
Processed Fruits: Fresh Frozen Fruits, Canned Fruits and Juices	4
Frozen Fruits and Vegetables	4
Canned Fruits and Vegetables	4
Juices.....	4
Trade	4
Table 1. Russian Federation, Imports of Major Fruits and Nuts, MY 1997 – 2002	5
Table 2. Import Price of 1 Metric Ton of Some Fresh Deciduous Fruits, USD	5
Table 3. Customs Tariffs. Selected Fruits	6
Sanitary Requirements and Quality Control.....	7
Policy	7
Marketing	7
Prices.....	8
Table 4. Domestic prices for apples, Rubles per kg	8
Apples	9
Production.....	9
Table 5. PSD, Apples, Metric Tons	9
Table 6. Apples – Area Planted, Harvested, Production and Yield, Main Producing Regions, MY 2002	10
Trade	10
Table 7. Export Trade Matrix for Apples, MY 2001-2003.....	10
Table 8. Import Trade Matrix for Apples, MY 2001-2003	11
Table 9. Imports of Apples by Months and Countries, MY 2002, Metric Tons.	11
Pears	12
Production.....	12
Table 10. PSD, Pears, Metric Tons	12
Table 11. Pears – Area Planted, Harvested, Production and Yield, Main Producing Regions, MY 2002	13
Trade	13
Table 12. Export Trade Matrix for Pears, MY 2001-2003.....	13
Table 13. Import Trade Matrix for Pears, MY 2001-2003	14

Seed Type Fruit Production

MY 2002 was a record year for fruit production; officially, production was two mmt, including, based on Post's calculations, 1.7 million metric tons of apples and 322,000 metric tons of pears. In MY 2003, Post forecasts apple production will decrease to 1.4 mmt and pear production will decrease to 226,000 metric tons based on natural yield oscillations, the major factor of production of seed type fruits in Russian orchards, most of which have older trees and don't employ modern technologies. Apples and pears, which are officially reported together in one category of "seed type fruits", compose almost sixty percent of all reported fruits and berry production. Production is concentrated in European Russia, where over ninety-one percent of all fruit was produced last year. Each of the main producing regions, Samara and Saratov oblasts, Krasnodar Kray, Voronezh, Lipetsk, Volgograd and Moscow oblasts, produced over one mmt of seed type fruits in MY 2002 or, all together, forty-three percent of total.

Contrary to Post's forecast, some sources in the fruit business think commercial apple production is increasing. This assessment is based on increasing offers of apples to traders and decreasing prices. Sources also indicate that the distribution of domestically produced apples expanded, meaning more apples were sold and consumed in areas of the country farther away from production areas. Post thinks this trend, combined with less waste, is responsible for the perception of increasing production.

Production in Kursk Oblast

Over the last three years improvements were made in the orchards business, but fruit production has still been largely unprofitable. For example, apple production in Kursk oblast, once the leader in Central Russia and also a selection center for the Black Earth, decreased by a factor of two during the 90s. Apple orchard area shrank by 1,000 hectares and yields decreased to 0.5 tons per hectare. Some orchards, including the experimental farm of the All-Russian Selection Institute of Orchards and Nurseries, managed to survive only due to profits from its dairy and animal businesses. These profits paid workers' salaries, bought mineral fertilizer, and allowed for workers from other divisions to be hired during peak seasons. The farm has already constructed one warehouse and is planning to add another for storing fruit, including pears, the production of which the farm plans to increase.

Production in Volgograd oblast

Volgograd oblast is the second (after Krasnodar Kray) largest producer of "seed type" fruits in the Southern Federal District, its share in total production generally varies from five to eight percent. In the beginning of the 90s, commercial production was concentrated in seventeen specialized fruit orchards on 8,500 hectares of fruit bearing area. By the beginning of 2000, only four or five enterprises had survived and industrial production had decreased significantly. In the middle of the 90s, the Administration of Volgograd oblast allocated funds for construction of a new fruit processing enterprise which would utilize modern equipment and new technologies, and is now the core of the juice producing agro-industrial corporation "Pridonye". In 2001, the corporation was ranked 17th in a list of the leading juice producers of Russia, in 2002 it was upgraded to 5th place, and in 2003, hopes to be ranked among the top three. "Pridonye" is the only big juice producer in the country that grows fruits and berries on its own farms. The company's orchard area is currently 1,173 hectares and every year up to 150,000 young plants are added.

Fruit Consumption

Domestic consumption is forecast to stabilize at 1.25 mmt and production changes will be compensated by higher imports. At the same time, domestic processing is forecast to decrease from 1.36 mmt in MY 2002 to 1.05 mmt in MY 2003 affecting mostly small orchards and homemade fruit preserves. Processing at large canneries, especially apple juice concentrates, will be stable. However, the absence of any statistical data makes accurate estimates of industrial processing impossible.

Processed Fruits: Fresh Frozen Fruits, Canned Fruits and Juices

Frozen Fruits and Vegetables

Production of frozen fruits and vegetables is one of the most dynamic sectors of the food industry with an estimated volume in 2002 of 50,000 metric tons (five times more than in 1990) and an estimated value of 65-70 million dollars. Production has been increasing since 1999 by twenty-five percent a year, gradually replacing imports. Domestic production of packaging materials, the most important factor in frozen fruit and vegetable production, is developing at the same fast pace.

Canned Fruits and Vegetables

Production of canned fruits is increasing rapidly as well. In January – June 2003, the canning industry produced two billion “standard” cans (approximately 670,000 metric tons), or thirty-two percent more than in the same period last year fueling the nearly fifty percent increase in the production of canned fruit in the first half of 2003. The General Director of the Association of Canneries forecasts that in 2003, the industry will produce a record 4.4 billion cans (1.45 million tons). In 2002 production of canned fruits and vegetables was 3.4 billion cans (1.1 million tons)

Juices

The juice market continues to expand, however, experts say the rate of expansion has slowed down from forty percent in 2002 to twenty or thirty percent this year. Industry experts attribute this slow down to over development in the last two years and a flattening in the rate of consumer income growth. Another factor may also be the tough competition for market share between several big companies and high entry costs. Several million dollars are necessary to simply advertise and promote new juice brands. However, in 2002-2003 the juice market was expanding faster than beer and bottled water.

Trade

According to the “Fruits-Vegetable Alliance”, the estimated value of the fresh fruit and vegetable market is one billion USD; imports constitute approximately \$700 million of that annually and are estimated at 1,800 tons. The main importers (ninety percent of all imports) are the following companies: “JFC”, “Sorus”, “Sunway”, “Globus”, and “Fruit Brothers”.

In MY 1997/98, imports were over one billion, but dropped by fifty-five percent the following year. Recovery began in MY 2000/01, and in MY 2002/03 imports rebounded to \$900.5 million. In total, Russia imported in MY 2002/03, according to the Russian State Customs Statistical data, almost 2.6 mmt of fruits and nuts compared with 2.2 mmt in MY 2001. Bananas, apples, and pears comprised almost half of all imports. Imports of kiwis and quinces in MY 2003 exceeded the level of MY 1997, and experts think these fruits will be one

of the most dynamic imports in the future. Imports of fresh grapes were twenty-five percent higher than before the 1998 crises and reached 107,787 metric tons. Imports of grapefruits increased to 32,675 in MY 2002, more than double MY 1999, when customs first began reporting different citrus fruits separately. Table 1 shows imports of fruits in MY 1997 through MY 2002.

Table 1. Russian Federation, Imports of Major Fruits and Nuts, MY 1997 – 2002

		MY 97/98	MY 98/99	MY 99/00	MY 00/01	MY 01/02	MY 02/03
		Millions of US Dollars					
	08 EDIBLE FRUIT AND NUTS	1 006,8	455,5	506,1	735,6	715,9	900,5
		Metric Tons					
	08 EDIBLE FRUIT AND NUTS	NA	NA	1 391 494	2 037 947	2 238 665	2 618 301
0805	CITRUS,FRESH,DRIED	NA	NA	452 985	485 283	660 798	727 306
080510	Oranges	NA	NA	244 062	240 125	335 527	372 903
080540	Grapefruits	NA	NA	14 234	18 862	27 549	32 675
0803	BANANAS,PLANTAINS	648 096	352 297	436 566	579 227	636 394	674 253
0808	APPL,PEAR,QNCE,FRSH	697 404	243 954	227 146	440 342	476 213	633 146
080810	Apples	517 042	174 681	149 373	335 109	333 263	443 563
080820	Pears and quinces	180 362	69 283	77 774	105 233	142 950	189 583
0806	GRAPES,FRESH OR DRIED	NA	54 483	69 964	132 532	147 556	165 853
080610	Grapes, fresh	86 123	33 164	28 073	79 377	103 563	107 787
0810	OTHER FRESH FRUIT	68 124	19 639	26 454	103 753	50 052	102 681
0813	OTHER DRIED	NA	NA	29 044	96 546	73 014	82 482
0809	VARIOUS FRESH FRUIT	62 345	38 206	46 757	70 963	73 070	82 405
0807	MELON,PAPAYAS,FRESH	107 166	85 269	58 482	72 113	44 071	50 492
0804	DATE,FIG,PINEAPPLE,ET	NA	NA	17 109	20 857	34 737	48 307
0802	OTHER NUT,FRESH,DRIED	NA	NA	12 330	19 743	19 848	19 022
0801	COCO,BRAZL,CASHW NUTS	NA	2 711	5 000	6 924	10 542	16 248
0811	FRUIT+NUTS,FROZEN	NA	2 476	7 123	8 177	9 335	12 702
0812	TEMPORARILY PRESERVED	NA	1 404	2 429	1 421	3 028	3 391
0814	PEEL,CITRUS/MELON	6	1	106	67	7	12

Note: Quinces compose less one percent of the total trade of subcategory 080820 (pears and quinces), and Post does not exclude quinces from this subcategory.

Source: State Customs Committee of the Russian Federation

Most large companies have established steady relationships with foreign suppliers based on good prices and delivery convenience. However, competition between the importers is increasing as foreign traders becoming more and more attracted to the growing Russian market, and try to play a more direct role. For foreign traders, the main barriers to entry are non-transparent sanitary/phytosanitary requirements and conformity certification procedures, which only experienced Russian companies can easily comply with.

The average import prices of major fruits (at-customs value divided by quantity) are given in the table below. It was only in MY 2002 that the price of fruits started to increase along with the quality. This was mainly the result of the decrease in the Ruble to USD ratio, which made imports from countries which sell in USD relatively cheaper.

Table 2. Import Price of 1 Metric Ton of Some Fresh Deciduous Fruits, USD

	MY 97	MY 98	MY 99	MY 00	MY 01	MY 02
Oranges	NA	NA	286	278	308	332
Grapefruits	NA	NA	282	295	299	312
Bananas	249	380	401	288	290	328
Apples	441	301	354	358	301	312
Pears	311	265	253	277	321	349
Grapes	725	568	566	658	407	473

Source: Post calculations based on State Customs data

Table 3. Customs Tariffs. Selected Fruits

Customs code	Commodity name	Import tariffs, percent of customs value or/and in EURO per 1 kg
0803	Bananas, plantains	5 percent, but not less than 0.02 EURO per 1 kg
0804	Date, figs, pineapple, etc	5 percent
0805 10	Oranges	5 percent, but not less than 0.02 EURO per 1 kg
0805 20	Mandarines, clementines, tangerines, etc	5 percent but not less than 0.03 EURO per 1 kg
0805 40	Grapefruits	5 percent, but not less than 0.02 EURO per 1 kg
0805 50	Lemons, limes	5 percent, but not less than 0.035 EURO per 1 kg
0805 90	Other	5 percent, but not less than 0.02 EURO per 1 kg
0806	Grapes, fresh or dried	5 percent
0807	Melons	5 percent
0808 10	Apples	
0808 10 100 0	- for cider production	0,2 EURO per 1 kg
	- other	
0808 10 200 1 0808 10 500 1 0808 10 900 1	-- January 1 through March 31	0.1 EURO per 1 kg
0808 10 200 2 0808 10 500 2 0808 10 900 2	-- April 1 through June 30	0.1 EURO per 1 kg
0808 10 200 3 0808 10 500 3 0808 10 900 3	-- July 1 through July 31	0.1 EURO per 1 kg
0808 10 200 4 0808 10 500 4 0808 10 900 4	-- August 1 through December 31	0.2 EURO per 1 kg
0808 20	Pears and Quinces	10 percent
0809	Apricots, cherries, peaches, plums and sloes, fresh	5 percent

0810	Other fruits, fresh	10 percent
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Imports from developing countries are at least thirty percent cheaper than other non-CIS origins. Imports from the CIS countries are duty free and sometimes this stimulates “gray” imports from Poland through the Ukraine and Moldova.

The value added tax on fruits is twenty percent.

Sanitary Requirements and Quality Control

Imports of fruits are subject to the standard quarantine and sanitary regulations of the Russian Federation, meaning each importer must submit documents to the quarantine and sanitary agencies before accepting delivery. The names of the products, approximate volumes, and countries of origin are included and on the bases of these documents, the State Quarantine Service issues a quarantine import permit, and the sanitary authorities issue a certificate of conformity (declaration on conformity), which states the product meets the requirements of the Russian SanPin (Sanitary and epidemiological norms and requirements for food products). Information on the latest SanPin is contained in Post reports RS2020 and RS2022.

Policy

Two years ago, a program to compensate growers for a portion of new orchard investment from the federal budget was approved. Two years after first implementing this program, MinAg decided to subsidize only the most effective farms instead of distributing money equally between all orchards. In 2003, 350 industrial orchards were selected and two thirds of their restoration expenses were subsidized; 30,000 Rubles per hectare (approximately \$1,000) for new plantings and restoration of old orchards, and 4,000 Rubles (\$133) per hectare for cultivation. These changes were approved in Resolution of the Government #120 “On the Federal Budget Subsidies for the State Support of Some Programs and Measures in Agriculture in 2003”, February 25, 2003. The recipients of these subsidies are required to have at the beginning of the year in which the subsidies are received, fruit orchard area of not less than one hundred hectares, berry-growing bush area of not less than ten hectares, vintage area of not less than one hundred hectares, plant nursery area of not less than three hectares, and hop garden area of not less than two hectares.

There is no special fruit policy at the consumption level, but the Fruits and Vegetable Alliance is working on finding sources of support for the “5 A Day” program, an international program aimed at promoting the nutritional and health benefits of fruit consumption.

Marketing

A consolidation of ownership is now occurring in the market as the biggest players acquire the property of smaller companies. For example, the company JFC from St. Petersburg, according to information from the mass media, has recently acquired the smaller company Konfei. According to estimates, JFC imports thirty percent of all bananas and twenty-five percent of all other fruits. This company has its own warehouses and terminals and the acquisition of the other company will help to expand its existing distribution network in St. Petersburg and Siberia by using the well-developed regional contacts of Konfei. According to the Fruits and Vegetable Alliance, three companies from St. Petersburg (“JFC”, “Sunway Traders” and “Sorus”) control over eighty percent of the market. The rest is shared among small importers, which unite to freight a ship and to distribute fruits throughout the country.

Prices

Domestic prices of most fruits are determined by import prices. In the domestic market, a twenty percent VAT is added to the import value, plus the traders' margin, which varies and is not reported, plus delivery and storage costs. Given different distances, which may be several thousand kilometers from the point of import to the consumption area, prices are very difficult to estimate accurately. Below are the results of a special market survey.

Table 4. Domestic prices for apples, Rubles per kg

	Russia, average	Min. price	City	Max. price	City	Average in USD	Import price, USD per kg
Jul. 2001	28.10	16.18	Voronezh	36.71	Vladivostok	1.12	0.25
Aug. 2001	25.49	10.83	Voronezh	36.46	Vladivostok	0.99	0.26
Sep. 2001	25.24	NA	NA	NA	NA	0.94	0.28
Oct. 2001	24.99	11.22	Lipetsk	37.92	Vladivostok	0.93	0.30
Nov. 2001	26.03	13.66	Voronezh, Krasnodar	39.08	Vladivostok	0.99	0.30
Dec. 2001	27.59	16.22	Voronezh	40.13	Vladivostok	0.92	0.29
Jan. 2002	29.62	16.75	Stavropol	41.80	Novosibirsk	0.97	0.30
Feb. 2002	30.11	17.63	Stavropol	43.17	Novosibirsk	0.98	0.33
Mar. 2002	30.81	NA	NA	NA	NA	0.99	0.30
Apr. 2002	31.50	18.25	Stavropol	42.21	Novosibirsk	1.01	0.30
May 2002	30.84	18.25	Stavropol	42.83	Novosibirsk	0.99	0.31
Jun. 2002	31.00	NA	NA	NA	NA	0.99	0.33
Jul. 2002	31.17	18.13	Stavropol	42.42	Vladivostok	0.99	0.34
Aug. 2002	29.65	NA	NA	NA	NA	0.94	0.32
Sep. 2002	28.13	12.18	Voronezh	43.17	Vladivostok	0.89	0.30
Oct. 2002	28.48	13.48	Voronezh	44.08	Vladivostok	0.92	0.29
Nov. 2002	30.03	15.03	Voronezh	45.25	Vladivostok	0.94	0.30
Dec. 2002	31.48	17.09	Voronezh	45.67	Vladivostok, Novosibirsk	0.99	0.32
Jan. 2003	32.35	17.52	Lipetsk	45.94	Novosibirsk	1.02	0.30
Feb. 2003	33.16	19.02	Lipetsk	46.30	Novosibirsk	1.05	0.30
Mar. 2003	33.39	20.35	Lipetsk	46.34	Novosibirsk	1.06	0.30
Apr. 2003	33.52	20.18	Stavropol	46.56	Novosibirsk	1.07	0.31
May 2003	34.72	21.00	Stavropol	46.40	Novosibirsk	1.12	0.33
Jun. 2003	36.31	20.74	Stavropol	46.36	Novosibirsk	1.20	0.34
Jul. 2003	36.53	19.18	Stavropol	44.99	Novosibirsk	1.20	0.34

Source: Torgovaya Gazeta, State Customs Committee

Note: "Torgovaya Gazeta" conducted the survey in thirty-three cities in different regions. During the administration of the survey, the exchange rate moved from 26 Rubles per dollar in the beginning of 2001 to 30.3 rubles by July 2003.

Apples

Production

Post forecasts an increase in apple orchard planted and harvested areas in 2003, but owing to periodic fluctuations in apple yields, production is forecast to decrease to 1.45 mmt after a ten-year record of 1.72 mmt in 2002. Non-commercial production will be the most affected by this decrease (down forty percent), while commercial production is forecast to decrease by only four percent to 1.1 mmt. Additionally, processing of apples is forecast to decrease from 1.21 mmt in MY 2002 to 1.11 mmt in MY 2003 (only an eight percent decrease), while fresh domestic consumption, in spite of higher imports, will fall by sixteen percent, and withdrawal from the market, or waste, will shrink by sixty percent. Post's forecast is based on the deeper integration and development of contract based relationships between juice companies and concentrate plants, canneries, and apple farms.

Table 5. PSD, Apples, Metric Tons

PSD Table						
Country	Russian Federation					
Commodity	Fresh Apples				(HA)(1000 TREES)(MT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		07/2001		07/2002		07/2003
Area Planted	439000	439000	440000	426600	0	430000
Area Harvested	370800	370800	370000	361600	0	370000
Bearing Trees	136000	136000	139000	136000	0	136000
Non-Bearing Trees	27000	27000	25000	26000	0	27000
Total Trees	163000	163000	164000	162000	0	163000
Commercial Production	870000	870000	950000	1150000	0	1050000
Non-Comm. Production	357600	357600	450000	572500	0	345000
TOTAL Production	1227600	1227600	1400000	1722500	0	1395000
TOTAL Imports	330950	330950	335000	443563	0	510000
TOTAL SUPPLY	1558550	1558550	1735000	2166063	0	1905000
Domestic Fresh Consump	770000	770000	880000	920136	0	920000
Exports, Fresh Only	1455	1455	2000	984	0	1000
For Processing	770000	770000	800000	1209100	0	970000
Withdrawal From Market	17095	17095	53000	35843	0	14000
TOTAL UTILIZATION	1558550	1558550	1735000	2166063	0	1905000

Note: Post gives its own estimates of apple production based on the official State Statistical Committee's data on the production of "seed type" fruits in the Russian Federation.

Table 6. Apples – Area Planted, Harvested, Production and Yield, Main Producing Regions, MY 2002

Apples: Area Planted, Harvested, Production and Yields by Regions, 2002				
	Planted, 1,000 HA	Harvested, 1,000 HA	Production, 1,000 MT	Yield, MT/HA
Russia	426,6	361,6	1722,5	4,8
Central Federal District, total	186,1	162,6	851,9	5,2
Including:				
- Bryansk oblast	15,4	15,2	23,1	1,5
- Voronezh oblast	28,5	24,9	108,1	4,3
- Kursk oblast	15,5	14	45,3	3,2
- Lipetsk oblast	17	13,5	106,1	7,9
- Moscow oblast	10,4	10,3	100,1	9,7
- Orel oblast	14,7	12	79,7	6,7
- Tula oblast	23,1	19	82,3	4,3
Southern Federal District, total	102,1	83,2	351,3	4,2
Including:				
- Krasnodar Kray	29,6	21,3	103,7	4,9
- Volgograd oblast	14,4	13	104,3	8
- Rostov oblast	18,7	15,7	18,2	1,2
Volga Valley Federal District, total	89,8	72,8	392,9	5,4
Including:				
- Tatarstan Republic	9,4	6,5	11,1	1,7
- Samara oblast	15,2	12,9	116,8	9
- Saratov oblast	12,7	10,9	118,3	10,8
Ural Federal District, total	11,1	9,2	27	2,9
Siberia Federal District, total	17,1	13,1	51,4	3,9
Far Eastern Federal District, total	2,9	2,1	9,4	4,5

Sources: Post's estimates based on State Statistical Committee's "seed type" fruits production data.

Trade

Table 7. Export Trade Matrix for Apples, MY 2001-2003

Export Trade Matrix			
Country	Russian Federation		
Commodity	Fresh Apples		
Time Period		Units:	Metric Tons
Exports for:	2001		2002
U.S.		U.S.	
Others		Others	
Country Unknown	1114	Kazakhstan	471
Kazakhstan	312	Country Unknown	369

Uzbekistan	4	Estonia	125
Tajikistan	3	Uzbekistan	8
		Turkmenistan	7
		Tajikistan	4
Total for Others	1433		984
Others not Listed	22		0
Grand Total	1455		984

Source: State Customs Committee of the Russian Federation.

Table 8. Import Trade Matrix for Apples, MY 2001-2003

Import Trade Matrix			
Country	Russian Federation		
Commodity	Fresh Apples		
Time Period		Units:	Metric Tons
Imports for:	2001		2002
U.S.	1060	U.S.	1079
Others		Others	
Poland	95032	Poland	138093
China	49842	China	92761
Argentina	39901	France	46195
France	36753	Argentina	39887
Italy	26357	Italy	24415
Belgium	16998	Belgium	23963
Moldova	12800	Moldova	16233
Netherlands	8279	Chile	12870
Chile	8221	Azerbaijan	9882
Germany	5778	Netherlands	8836
Total for Others	299961		413135
Others not Listed	30989		20428
Grand Total	330950		433563

Source: State Customs Statistics of the Russian Federation

In MY 2002, apples were imported from 59 different countries, although imports from ten major suppliers composed over 95 percent of the total. Competition is getting tougher with more aggressive policies and a higher quality of products offered by China and Poland.

Table 9. Imports of Apples by Months and Countries, MY 2002, Metric Tons.

	2002						2003					
	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun/
0--The World--	15 456	9 234	13 583	27 348	27 124	28 402	59 475	52 640	60 471	56 439	57 549	35 841
1 Argentina	5 651	333	3	2	0	0	2	2	1 615	7 088	15 035	10 157
2 Poland	997	392	210	298	3 214	5 960	28 411	26 987	30 745	24 019	12 054	4 807

3	Chile	157	107	90	0	0	0	0	0	12	1 128	8 041	3 335
4	China	2 651	3 695	4 970	9 555	9 438	7 386	11 243	10 149	12 464	8 618	7 521	5 070
5	Italy	498	235	152	278	653	1 228	4 844	3 074	3 398	3 258	4 278	2 518
6	France	435	1 123	2 630	4 377	5 433	5 279	6 959	4 379	5 531	5 434	2 659	1 954
7	Belgium	408	270	717	1 728	1 459	3 518	4 210	3 356	2 548	2 513	2 362	874
8	Germany	459	1	0	12	83	29	233	284	224	641	1 762	410
9	Netherlands	640	437	266	265	498	589	1 024	749	616	942	1 432	1 380
10	South Africa	1 891	218	147	13	0	0	0	0	1	301	924	4 353
11	Moldova	329	852	1 155	3 369	2 532	2 176	704	1 710	1 637	1 207	546	15
12	Uruguay	0	0	0	0	0	0	0	0	0	1	295	250
13	Hungary	0	0	0	0	0	35	0	0	20	33	129	0
14	United States	41	0	0	304	90	182	71	47	86	67	114	77
15	Greece	0	0	0	0	0	6	177	131	261	321	111	0
	Other	1 299	1 569	3 243	7 141	3 724	2 011	1 596	1 772	1 313	869	286	635

Pears

Production

Table 10. PSD, Pears, Metric Tons

PSD Table						
Country	Russian Federation					
Commodity	Fresh Pears					(HA)(1000 TREES)(MT)
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		07/2001		07/2002		07/2003
Area Planted	68800	68800	69000	69000	0	69100
Area Harvested	53800	53800	54000	54000	0	54300
Bearing Trees	17000	17000	17200	17200	0	17300
Non-Bearing Trees	10000	10000	10100	10100	0	10100
Total Trees	27000	27000	27300	27300	0	27400
Commercial Production	95000	95000	95000	115000	0	96000
Non-Comm. Production	131000	131000	131000	207000	0	130000
TOTAL Production	226000	226000	226000	322000	0	226000
TOTAL Imports	141060	141060	142000	189583	0	195000
TOTAL SUPPLY	367060	367060	368000	511583	0	421000
Domestic Fresh Consump	287650	287650	290000	326500	0	332000
Exports, Fresh Only	110	110	200	155	0	210
For Processing	72100	72100	73000	152000	0	80100
Withdrawal From Market	7200	7200	4800	32928	0	8690
TOTAL UTILIZATION	367060	367060	368000	511583	0	421000

Sources: Post's area and production estimates are based on State Statistical Committee's "seed type" fruits production data.

Table 11. Pears – Area Planted, Harvested, Production and Yield, Main Producing Regions, MY 2002

Pears: Area Planted, Harvested, Production and Yields by Regions, 2002				
	Planted, 1,000 HA	Harvested, 1,000 HA	Production, 1,000 MT	Yield, MT/HA
Russia	66,8	52,5	322,1	6,1
Central Federal District, total	20,4	17,5	119,8	6,9
including:				
- Bryansk oblast	0,8	0,8	1,4	1,7
- Voronezh oblast	5	4,4	19,5	4,4
- Kursk oblast	2,7	2,5	8	3,3
- Lipetsk oblast	3	2,4	18,9	7,9
- Moscow oblast	0,6	0,6	5,2	9,3
- Orel oblast	0,8	0,6	4	6,3
- Tula oblast	1,2	1	4,2	4,4
Southern Federal District, total	24,9	20,2	86,1	4,3
including:				
- Krasnodar Kray	7,4	5,3	27,3	5,1
- Volgograd oblast	2,5	2,3	18,4	8
- Rostov oblast	4,7	4	4,9	1,2
Volga Valley Federal District, total	11,6	9,2	63,9	7
including:				
- Tatarstan Republic	1,7	1,2	1,9	1,6
- Samara oblast	2,7	2,4	20,6	8,7
- Saratov oblast	2,2	2	14,5	7,3
Ural Federal District, total	0,6	0,5	2,8	5,9
Siberia Federal District, total	0	0,3	0,6	2,8
Far Eastern Federal District, total	0,2	0,1	0,5	5,6

Trade**Table 12. Export Trade Matrix for Pears, MY 2001-2003**

Export Trade Matrix			
Country	Russian Federation		
Commodity	Fresh Pears		
Time Period		Units:	Metric Tons
Exports for:	2001		2002
U.S.		U.S.	
Others		Others	
Country Unknown	61	Kazakhstan	129
Kazakhstan	49	Turkmenistan	15
		Country Unknown	10

		Uzbekistan	1
Total for Others	110		155
Others not Listed	0		0
Grand Total	110		155

Source: State Customs Committee

Table 13. Import Trade Matrix for Pears, MY 2001-2003

Import Trade Matrix			
Country	Russian Federation		
Commodity	Fresh Pears		
Time Period		Units:	Metric Tons
Imports for:	2001		2002
U.S.	657	U.S.	946
Others		Others	
Argentina	42329	Argentina	59872
Belgium	16050	Belgium	32127
Spain	15891	China	29299
France	15440	Netherlands	16606
China	15096	France	12042
Netherlands	8169	Poland	9042
Chile	7089	South Africa	7505
Portugal	6542	Spain	7232
South Africa	5204	Portugal	6980
Poland	3174	Chile	1728
Total for Others	134984		182433
Others not Listed	7966		7150
Grand Total	142950		189583