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# GAIN Report

Global Agriculture Information Network

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## Japan

## Fresh Deciduous Fruit

## Annual

## 2003

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**Report Highlights:**

Japanese table grape production in 2003 is estimated at 230,000 tons, down approximately 1 percent from the previous year. Good packaging and handling practices by California growers and shippers have improved fruit quality and extended shelf life, giving California Red Globes an excellent reputation for quality in Japan. Japanese apple production in 2003 is estimated at 891,700 tons, down approximately 4 percent from the previous year. Japanese apple imports were only 108 tons in 2002, a significant decline from the previous year. Western pear production in Japan was up approximately 10 percent from the previous year in 2002.

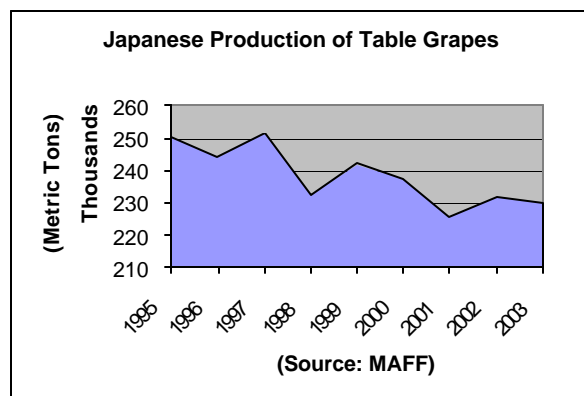
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### The 2003 Japanese Table Grape Production Expected to Decline 1 Percent

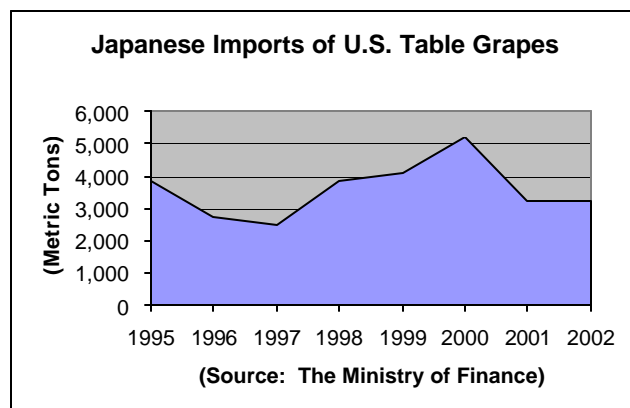


Japanese table grape production has been declining for over 10 years. Production is estimated at 230,000 metric tons in 2003, down approximately 1 percent from the previous year, according to the Ministry of Agriculture, Forestry and Fisheries (MAFF). Japan experienced fairly good weather when table grapes were flowering and pollinating in the spring and grapes. Kyoho, large and dark purple colored grapes, is the most commonly grown variety in Japan, accounting for approximately 34 percent of Japan's grape production. Kyoho is followed by the following

varieties; Delaware (19%), Pione (9%), Muscat (6%), Campbell-Early (6%), Koshu (4%), and Kaiji (2%). Production of both Kyoho and Pione increased 3 percent from the previous year, while Delaware declined 7 percent. Production declines are mostly a result of Japan's aging farm population leaving farming and taking harvest area out of production. Japan's harvest area is estimated at 19,500 hectares in 2003, a decline of approximately 1 percent from the previous season.

In mid-September, Tokyo supermarkets sold a cluster of Kyoho grapes (362 grams) for \$2.86 (318 yen), Kaiji grapes (304 grams) for \$2.68 (298 yen), and Muscat (668 grams) for \$7.71 (856 yen). Kaiji grapes are similar to California Red Globes.

### California Red Globes Established An Excellent Reputation for Quality in Japan



The quality of California table grapes is fairly stable throughout the season, with high Brix levels, according to Tokyo traders. The arrival fruit quality is reportedly excellent and the fruit has a long shelf-life to market. Grape clusters are individually wrapped with a sheet of paper and carefully packaged in a 9-kilogram box. California table grapes are shipped in temperature-controlled containers. Good packaging and handling practices by California growers and shippers have significantly improved fruit quality and extended shelf life.

Peak sales of California Red Globes start in mid-October, at the end of the domestic season. The quality of Japanese table grapes was irregular this season due to the cool weather in July and August. Sales of California table grapes are expected to do well this fall, according to Tokyo traders.

California table grapes have a strong competitive advantage in the Japanese market, according to retail specialists. Japanese retailers can sell California Red Globes at less than half the price of Japan's best selling Kyoho variety. In a drastic change from past years, consumers are looking for value in their food purchases.

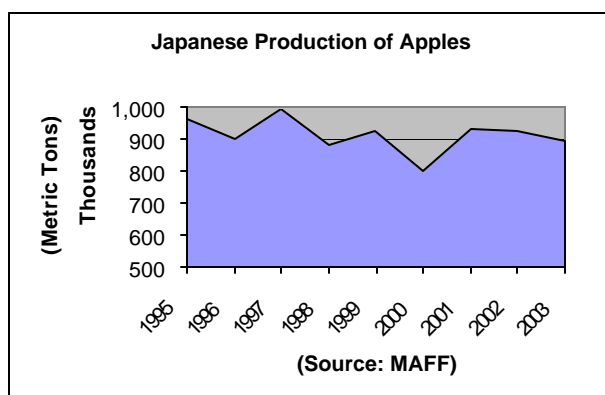
Tokyo's major supermarkets sold California Red Globes for \$2.68 (298 yen) a cluster of 700 – 800 grams, while domestic table grapes sold for \$3.58 (398 yen) for a cluster of 350 – 400 grams. Tokyo supermarket buyers usually estimate that California Red Globes can sell for \$0.35 - \$0.40 (39 – 45 yen) per 100 grams and will sometimes sell for \$0.26 (29 yen) per 100 grams as a sales item. California Thomson Seedless will sell for \$0.52 (58 yen) per 100 grams, slightly higher than Red Globes because shipment is only by airfreight. The 2003 crop of California Red Globes arrived in Japan in early-September, and was traded at \$34.23 (3,800 yen) for a 9-KG case at Tokyo Ohta Wholesale Market.

In 2002, Japan imported 3,224 metric tons of California table grapes (mainly Red Globes and Thomson Seedless), valued at \$5.42 million (CIF).

### Chilean Red Globes Continue to Sell Well in Japan

In the 2003 season (January-June), Chile exported 8,797 metric tons of table grapes to Japan, up 6.0 percent from the previous season, valued at \$11.66 million (CIF). The quality of Chilean table grapes was unstable due to transportation problems, according to Tokyo traders. Chile does not compete with California in the table grape market.

### Japanese Apple Production in 2003 Expected to Decline 4 Percent



Japanese apple production in 2003 is estimated at 891,700 metric tons, down approximately 4 percent from the previous year, according to the Ministry of Agriculture, Forestry and Fisheries (MAFF). In the spring, the Japanese apple industry conducted a fruit-thinning program in order to improve the quality of apples, but there are still many small-sized fruit in the 2003 crop, according to Tokyo traders. Apple growers in Aomori Prefecture experienced production difficulties when a typhoon hit the region in mid-September. The industry

estimated that approximately 10 percent of the fruit was damaged in some regions. Aomori Prefecture, approximately 500 miles North-East of Tokyo, produces approximately 52 percent of the nation's apples. The Fuji is the most popular variety grown in Japan, accounting for approximately 55 percent of the nation's apple production. Harvesting of Fuji, a late-crop variety, begins in mid-October. Tsugaru, Jonagold and Ohrin are also popular, with approximately 13, 10 and 9 percent of total production, respectively. Harvest of the early-crop Tsugaru began in August and will finish in mid-October. The quality, Brix (sweetness) level, and fruit color and taste are reportedly good for all apple varieties this season.

The Japanese apple industry estimates that 145,000 metric tons of the 2003 apples will go to processing, of which 125,000 metric tons go to juice while the rest go to canning and jam processing.

The 2003 apple harvesting area is estimated at 41,700 hectares, down approximately 2 percent from the previous year, according to MAFF. This decline is due to orchard closures as a result of Japan's aging farm population.

In mid-September, Tokyo supermarkets sold Tsugaru apples at \$0.89 (99 yen) for a medium sized fruit or at \$5.22 (580 yen) for a bag of 6 medium-size apples. This price range is

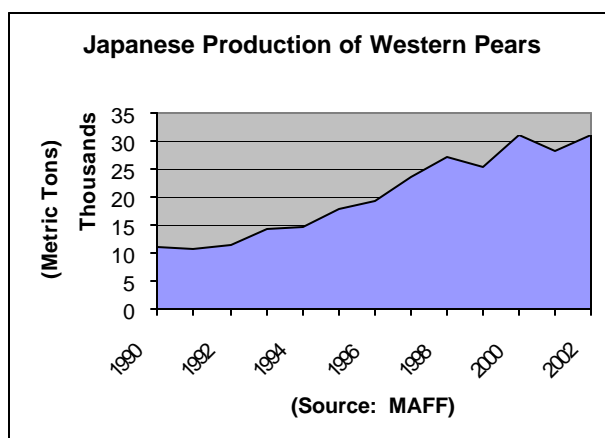
similar to last year. Tsugaru apples were traded at \$21.62 (2,400 yen) for a 10-kilogram box (36 apples in a box) at Tokyo Ohta Wholesale Market.

### Japanese Apple Imports Declined Significantly in 2002

Japanese apple imports were only 108 metric tons in the 2002 season, less than one third the previous season. Australia exported three container loads (107 metric tons) of Tasmania Fuji apples to Japan in June 2003. South Korea exported 0.6 metric tons of Fuji apples in October 2002. Small sized Tasmanian Fuji apples were not well received by Japanese consumers, according to Tokyo supermarket specialists. Tokyo supermarkets sold Australian Fuji apples for \$1.15 (128 yen) per fruit when the first shipments arrived, and discounted them to approximately \$0.45 (50 yen) per fruit later in the season.

There were no imports of U.S. apples in 2002.

### Japanese Western Pear Production Keeps Rising



Japanese Western pear production in 2002 was 31,100 metric tons, up approximately 10 percent from the previous year, according to the Ministry of Agriculture, Forestry and Fisheries (MAFF). Traditionally, Japan produces Japanese sand pears, which have significantly different fruit flesh texture than Western pears. La France and Bartlett are two major Western pear varieties grown in Japan. Yamagata Prefecture, 250 miles North of Tokyo, harvests approximately 61 percent of the nation's Western pears. Western pear production is relatively new in Japan. Western pear trees were planted in

Yamagata prefecture as a part of the region's agricultural development.

The harvested area for the 2002 Western pear was 1,730 hectares, up approximately 2 percent from the previous year.

Japan continues to ban imports of U.S. pears due to phytosanitary concerns.

### Import Duties on Fresh Apples and Table Grapes

These duties are not subject to further reductions. The applicable import duties are:

DESCRIPTION TARIFF CODE (HS)		DUTY RATE
Fresh Apples 0808.10-000		17.0 %
Fresh Table Grapes 0806.10-000	3/1 – 10/31	17.0 %
	11/1 – 2/28	7.8 %

All duties are charged on a CIF basis.

## PS&amp;D Tables and Trade Matrices

## Fresh Apple PS&amp;D Table

## PSD Table

Country	Japan		(HA)(1000 TREES)(MT)			
	Fresh Apples		2002	Estimate	2003	Forecast
Commodity	2001	Revised	2002	Estimate	2003	Forecast
	USDA	Post	USDA	Post	USDA	Post
	Official	Estimate	Official	Estimate	Official	Estimate
	[Old]	[New]	[Old]	[New]	[Old]	[New]
Market Year Begin	07/2001		07/2002		07/2003	
Area Planted	45900	45900	45000	45000	0	44100
Area Harvested	43100	43100	42400	42400	0	41700
Bearing Trees	42300	42300	41600	41600	0	40900
Non-Bearing Trees	3610	3610	3400	3400	0	3200
Total Trees	45910	45910	45000	45000	0	44100
Commercial Production	829500	829500	812500	809400	0	787800
Non-Comm. Production	101200	101200	99400	116400	0	103900
TOTAL Production	930700	930700	911900	925800	0	891700
TOTAL Imports	349	349	1000	108	0	100
TOTAL SUPPLY	931049	931049	912900	925908	0	891800
Domestic Fresh						
Consump	776203	776203	762900	768705	0	731800
Exports, Fresh Only	6546	6546	5000	12203	0	15000
For Processing	148300	148300	145000	145000	0	145000
Withdrawal From						
Market	0	0	0	0	0	0
TOTAL UTILIZATION	931049	931049	912900	925908	0	891800

Fresh Apple Export Trade Matrix

# Export Trade Matrix

Country Japan  
 Fresh  
 Commodity Apples

Time Period	Jul. - Jun.	Units:	Metric Tons
Exports for:	2001		2002
U.S.	46	U.S.	58
Others		Others	
Taiwan	5637	Taiwan	11580
Hong Kong	371	Hong Kong	231
Thailand	165	Thailand	199
Singapore	119	Indonesia	60
South Korea	94	Singapore	28
Indonesia	58	French Oceania	18
French Oceania	24	Philippines	12
Philippines	10	Guam	11
Guam	8		
Total for Others	6486		12139
Others not Listed	14		6
Grand Total	6546		12203

Fresh Apple Import Trade Matrix

# Import Trade Matrix

Country Japan  
 Fresh  
 Commodity Apples

Time Period	Jul. - Jun.	Units:	Metric Tons
Imports for:	2001		2002
U.S.	0	U.S.	0
Others		Others	
Australia	167	Australia	107
South Korea	182	South Korea	1
Total for Others	349		108
Others not Listed	0		0
Grand Total	349		108



Fresh Apple Wholesale Price Table

# Prices Table

**Country** Japan

**Commodity** Fresh Apples

Prices in  per uom

Year	2002	2003	% Change
Jan	175	181	3%
Feb	161	176	9%
Mar	176	190	8%
Apr	200	219	10%
May	213	252	18%
Jun	232	315	36%
Jul	261	358	37%
Aug	294		-100%
Sep	207		-100%
Oct	210		-100%
Nov	199		-100%
Dec	180		-100%

Exchange Rate  Local Currency/US \$  
 Date of Quote  MM/DD/YYYY

## Fresh Pear PS&amp;D Table

## PSD Table

Country	Japan				(HA)(1000 TREES)(M T)		
	Fresh Pears						
Commodity	2001	Revised Post Estimate	2002	Estimate	2003 USDA Official	Forecast Post Estimate	
	USDA Official [Old]	[New]	USDA Official [Old]	Post Estimate [New]	[Old]	[New]	
Market Year Begin	07/2001		07/2002		07/2003		
Area Planted	19350	19350	19040	18950	0	18550	
Area Harvested	18100	18100	17810	17830	0	17350	
Bearing Trees	4380	4380	4340	4340	0	4300	
Non-Bearing Trees	440	440	410	400	0	360	
Total Trees	4820	4820	4750	4740	0	4660	
Commercial Production	365600	365600	393200	373300	0	375000	
Non-Comm. Production	31400	31400	33100	33300	0	32300	
TOTAL Production	397000	397000	426300	406600	0	407300	
TOTAL Imports	907	907	700	193	0	200	
TOTAL SUPPLY	397907	397907	427000	406793	0	407500	
Domestic Fresh Consump	394586	394586	423500	403678	0	404300	
Exports, Fresh Only	2821	2821	3000	2615	0	2700	
For Processing	500	500	500	500	0	500	
Withdrawal From Market	0	0	0	0	0	0	
TOTAL UTILIZATION	397907	397907	427000	406793	0	407500	

Fresh Pear Export Trade Matrix

# Export Trade Matrix

Country Japan  
 Fresh  
 Commodity Pears

Time Period	Jul. - Jun.	Units:	Metric Tons
Exports for:	2001		2002
U.S.	376	U.S.	366
Others		Others	
Hong Kong	1760	Hong Kong	1650
Taiwan	458	Taiwan	509
Singapore	104	Australia	31
Netherlands	28	Singapore	26
South Korea	24	Netherlands	14
Malaysia	24	Guam	7
Indonesia	14	Malaysia	3
Australia	10		
Guam	7		
Total for Others	2429		2240
Others not Listed	16		9
Grand Total	2821		2615

Fresh Pear Import Trade Matrix

# Import Trade Matrix

**Country** Japan  
**Commodity** Fresh Pears

Time Period	Jul. - Jun.	Units:	Metric Tons
Imports for:	2001		2002
U.S.	0	U.S.	0
Others		Others	
South Korea	907	South Korea	193
Total for Others	907		193
Others not Listed	0		0
Grand Total	907		193

Fresh Pear Wholesale Price Table

# Prices Table

**Country** Japan

**Commodity** Fresh Pears

Prices in  per uom

Year	2002	2003	% Change
Jan	214	242	13%
Feb	214	236	10%
Mar	213	218	2%
Apr	167	239	43%
May	307	173	-44%
Jun	927	970	5%
Jul	390	426	9%
Aug	269		-100%
Sep	229		-100%
Oct	189		-100%
Nov	209		-100%
Dec	270		-100%

Exchange Rate	<input type="text" value="111.37"/>	Local Currency/US \$
Date of Quote	<input type="text" value="9/29/2003"/>	MM/DD/YYYY

## Fresh Table Grape PS&amp;D Table

## PSD Table

Country

Japan

Fresh

Table

Commodity

Grapes

(HA)(MT)

	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official	Post Estimate	USDA	Post	USDA	Post
	[Old]	[New]	[Old]	[New]	[Old]	[New]
Market Year Begin		01/2002		01/2003		01/2004
Area Planted	21200	20900	20800	20600	0	20300
Area Harvested	19700	19700	19500	19500	0	19300
Commercial Production	214800	212300	215000	210600	0	210000
Non-Comm. Production	20400	19400	20800	19400	0	15000
TOTAL Production	235200	231700	235800	230000	0	225000
TOTAL Imports	13000	11836	17324	12000	0	12000
TOTAL SUPPLY	248200	243536	253124	242000	0	237000
Domestic Fresh Consump	219670	215475	224600	213950	0	211950
Exports, Fresh Only	30	61	24	50	0	50
For Processing	28500	28000	28500	28000	0	25000
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	248200	243536	253124	242000	0	237000

Fresh Table Grape Export Trade Matrix

# Export Trade Matrix

Country Japan  
 Fresh Table  
 Commodity Grapes

Time Period	Jan. - Dec.	Units:	Metric Tons
Exports for:	2001		2002
U.S.	0	U.S.	0
Others		Others	
Hong Kong	36	Taiwan	43
		Hong Kong	18
Total for Others	36		61
Others not Listed	0		0
Grand Total	36		61

Fresh Table Grape Import Trade Matrix

# Import Trade Matrix

Country Japan  
 Fresh Table  
 Commodity Grapes

Time Period	Jan. - Dec.	Units:	Metric Tons
Imports for:	2001		2002
U.S.	3222	U.S.	3224
Others		Others	
Chile	7784	Chile	8295
Mexico	345	Mexico	248
Taiwan	122	Taiwan	48
New Zealand	23	New Zealand	19
China	11	South Korea	1
South Korea	2		
Total for Others	8287		8611
Others not Listed	1		1
Grand Total	11510		11836



Fresh Table Grape Wholesale Price Table

# Prices Table

**Country** Japan  
**Commodity** Fresh Table Grapes

Prices in  per uom

Year	2002	2003	% Change
Jan	587	732	25%
Feb	529	634	20%
Mar	605	1182	95%
Apr	2640	2951	12%
May	1556	1704	10%
Jun	917	1014	11%
Jul	735	813	11%
Aug	664		-100%
Sep	526		-100%
Oct	487		-100%
Nov	635		-100%
Dec	700		-100%

Exchange Rate  Local Currency/US \$  
 Date of Quote  MM/DD/YYYY