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## Japan

### Fresh Deciduous Fruit

#### Annual

#### 2006

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**Report Highlights:**

Japanese imports of U.S. table grapes declined in 2005, partly due to a good domestic crop. Domestic grapes remained in the market longer than the traders expected, affecting sales of U.S. grapes in the 2005 season. Japanese traders expect an increase of U.S. grape sales in 2006, especially seedless types such as Crimson Seedless. The Japanese domestic grape production forecast for 2006 is 217,300 metric tons, down 1 percent. Japanese apple production this year is estimated to be 860,000 metric tons, up approximately 5 percent from the previous year. Fuji apples continue to be the most popular variety. Japanese exports of apples to Asian countries are growing rapidly. Japanese sand pear production this year is estimated to be 343,300 metric tons, down approximately 5 percent. Japan continues to ban imports of U.S. pears due to phytosanitary concerns.

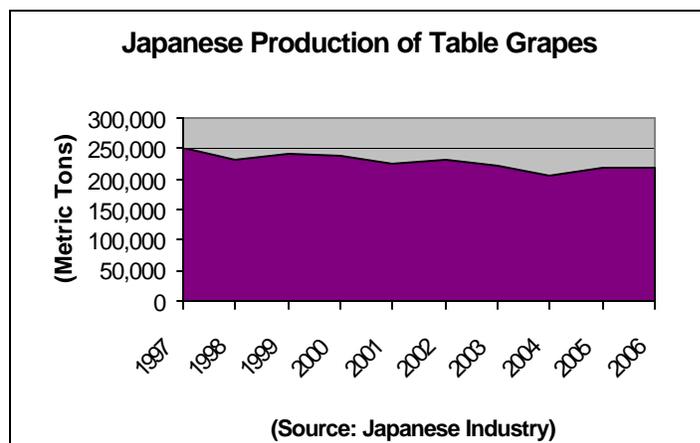
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[JA]

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### The 2006 Domestic Table Grape Production Expected to Decline Marginally



The 2006 Japanese table grape production forecast is approximately 217,300 metric tons, down approximately 1 percent from the previous season, according to industry sources. The total harvesting area is approximately 19,100 hectares, no changes from the previous season. The fruit setting stage of vines took place fairly successfully in the spring, according to growers, but heavy rain fall in the early summer delayed growth and also damaged fruit quality in some regions. The harvest

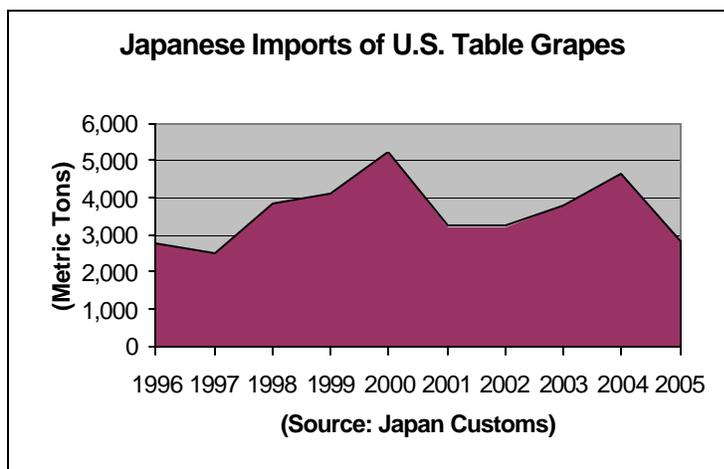
may be delayed approximately one week. Growers also reported that some regions were infected with a gray mildew disease.

*Kyoho*, Delaware and Pione grapes are the three major varieties produced in Japan (composing approximately 63 percent of the total production.) *Kyoho* grapes, a large dark-purple grape, has the largest production (composing approximately 34 percent) in Japan's table grape market. Japanese consumers prefer *Kyoho* grapes, which have a very sweet flavor. *Kyoho* grapes are often used as a gift item. Delaware grapes, a smaller variety, are also popular among Japanese consumers. Delaware grapes make up approximately 19 percent of the total Japanese grape production. Pione grapes, which make up approximately 10 percent of production, continue to increase their production at an annual rate of approximately 5 percent. Muscat Bailey-A, *Koshu* and *Kajji* are also popular varieties harvested in Japan. *Koshu* and *Kajji* are similar to the U.S Red Globe variety. Japanese table grapes are primarily consumed fresh, but approximately 12 percent of grapes are destined for processing, including wine making.

The new crop of domestic grapes appeared in the market in July, with the volume increasing towards late August. Peak sales of domestic grapes are expected in September although sales continue until October. In late August, Delaware grapes were trading at \$6.41 - \$11.55 (750 - 1,350 yen) for a 2-kilogram box at Tokyo Central Wholesale Market, and *Kyoho* grapes were trading at \$20.96 - \$34.13 (2,450 - 3,990 yen) for a 5-kilogram box. Tokyo supermarkets sold *Kyoho* grapes at \$0.83 (98 yen) per 100 grams or \$3.40 (398 yen) for a cluster of medium sized grapes, and a cluster of Delaware grapes for \$1.28 (150 yen) or a tray of three clusters for \$3.40 (398 yen.) Large Pione grape clusters were sold at \$6.82 (798 yen) per cluster and Muscat grapes for \$5.81 (680 yen) per cluster. Table grapes were individually packaged in clamshell type plastic containers.

\* The exchange rate of 116.88 yen per dollar is based on the *Nikkei News* quoted on August 30, 2006.

### Extended Sales of Domestic Grapes Affected U.S. Grape Sales in 2005



Japan imported 2,833 metric tons of U.S. table grapes in 2005, down approximately 39 percent from the previous year, valued at \$5.82 million (CIF). The decline in imports from the United States was due largely to extended sales of domestic table grapes in the market, which significantly affected the sales of U.S. grapes, according to Tokyo traders. In average years U.S. table grape sales start when domestic grape sales are completed in mid October so that U.S. grapes can avoid competing with domestic products; however,

this was not the case in the 2005 season since the domestic grape season extended well into November, which is the prime marketing season for U.S. table grapes in Japan.

Due to the extended sales of domestic products in 2005, the wholesale price for table grapes declined approximately 37 percent in October 2005 from the level of the previous year, which likely discouraged Japanese traders from purchasing U.S. products, according to Tokyo traders. U.S. grape sales in the period from October to December 2005 were down approximately 45 percent from the previous year. The prime marketing season for U.S. table grapes in Japan is October through December. In November 2005, California Red Globe grapes were trading at \$28.23 - \$30.80 (3,300 – 3,600 yen) for a 9-kilogram box at Tokyo Wholesale Market. This is the price that jobbers sold to retailers.

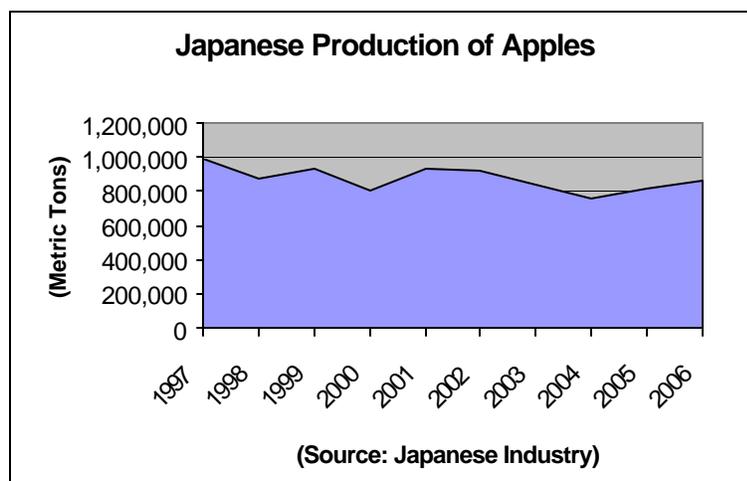
U.S. table grapes have a reputation among Japanese traders for high quality. Traders continue to market various varieties of table grapes from the United States, from red colored grapes to dark purple and light green colored ones. The Red Globe variety, which has high brix levels and a long shelf life, is by far the largest type shipped from the United States, accounting for approximately 85 percent of U.S. grapes sold in Japan. Crimson Seedless (red colored grapes) and Autumn Royal (dark purple grapes) are also popular grapes shipped from the United States, totaling approximately 8 and 3 percent of U.S. grapes sold in Japan, respectively. Thomson Seedless (yellowish green grapes) are also an important variety sent from the United States.

The 2006 new crop U.S. table grapes began arriving to Japan in September. Trade seminars and press events are scheduled in Tokyo by the California Table Grape Commission to explain the new crop situation and the marketing plan for the new season. U.S. table grape sales in Japan are affected by the domestic crop situation since the sales for domestic grapes take place before U.S. grapes. Japanese traders expect an increase of U.S. grape sales this season; however, they noted that domestic grape harvesting has been delayed approximately one week due to the lack of sunlight during the summer. The delay in harvesting, like last season, may extend domestic grape sales well into the marketing season of U.S. grapes. According to Japanese traders, sales of Crimson Seedless grapes are expected to increase in Japan, since Japanese consumers prefer seedless grapes.

### Chilean Grape Sales for the 2006 New Crops Down 10 Percent

Chile enjoys a counter seasonal advantage for marketing grapes in Japan. Chile ships table grapes to Japan from January through June, reflecting the Southern Hemisphere harvesting. Chile shipped 7,164 metric tons of table grapes to Japan from January through June 2006, down approximately 9.7 percent from the previous season. The new crop arrived from Chile in mid January 2006. Chilean Red Globe grapes were trading at the Tokyo Wholesale Market at \$34.22 - \$36.78 (4,000 – 4,300 yen) for an 8-kilogram box in the early season and the price became lower as the shipment volume increased in March and April to \$25.66 - \$28.23 (3,000 – 3,300 yen.) This is the price that jobbers sell to retailers. Chile sold a great deal of Red Globe grapes as well as Thompson Seedless.

### The 2006 Japanese Apple Production Expected to be Up 5 Percent



2006 Japanese apple production is estimated at 860,000 metric tons, up approximately 5 percent from the previous year, according to industry sources. The favorable spring weather resulted in a relatively good fruit setting in the growing regions. Japan experienced heavy rainfalls in June and July 2006 that made apple growers worry about a poor crop; however, the hot summer weather somewhat made up for earlier poor weather. The Japanese harvest area continues to decline at an annual rate of

approximately one percent due to the unattended orchards.

*Aomori* prefecture, Japan's apple capital, expects an increase (approximately 6%) in its commercial shipments this season. Fruit size for *Ohrin* apples (a similar variety to Golden Delicious apples) is expected to be slightly larger than the size of the average year, while the size for *Tsugaru* and *Fuji* apples (both red color varieties) is slightly smaller this season, according to industry sources. Peak commercial shipments of *Tsugaru* apples from *Aomori* prefecture are expected to be in late September. *Nagano* prefecture, the nation's second most important apple growing capital, expects a marginal decline (approximately 2%) in this season's shipments due to smaller sized fruit. The *Nagano* region largely produces *Tsugaru* apples and peak shipments for this season's crop are expected to be in early September. *Aomori* and *Nagano* prefectures produce approximately 52 and 22 percent of nation's apples, respectively.

*Fuji* apples are the most commonly produced variety in Japan, accounting for approximately 55 percent of the nation's apple production. *Tsugaru* is also an important variety, sharing approximately 12 percent of the nation's apple output. *Jonagold*, *Ohrin* and *Mutsu* apples are also important varieties, sharing 9, 9 and 2 percent of nation's apple production, respectively.

In late August, *Tsugaru* apples were trading at approximately \$34.22 (4,000 yen) for fancy grade for a 10-kilogram carton and approximately \$29.08 (3,400 yen) for choice grade apples at the Tokyo Central Wholesale Market. This is for size 36 and 40 apples. The size 36 apple means that 36 apples fit in a 10-kilogram carton. *Fuji* apples are a late variety and

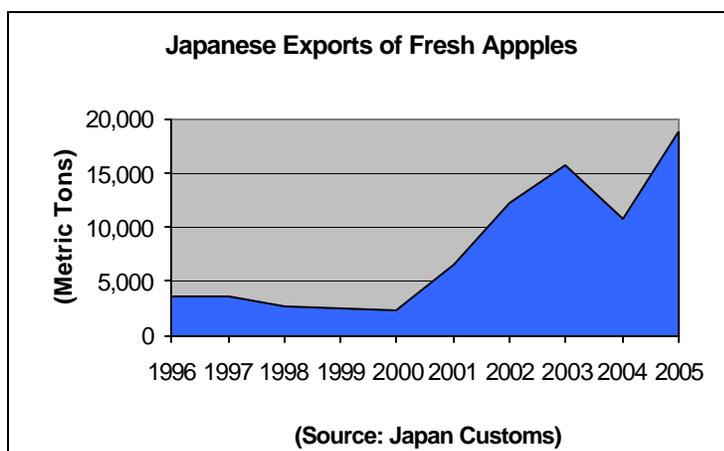
appear in late September. Tokyo supermarkets sold *Tsugaru* apples at \$1.35 (158 yen) for one large piece of fruit.

### No Imports of U.S. Apples to Japan in 2005

There have been no imports of U.S. apples to Japan since the 2002 marketing season. Competition is fierce in the Japanese apple market in terms of quality and price. The high cost of U.S. apples makes it difficult to compete with domestic apples, according to Tokyo trades.

Japan imported 123 metric tons of fresh apples in July 2005; all came from Australia (Tasmania). Japanese consumers commented that Tasmanian Fuji apples were not so great this season in terms of size, color and flavor.

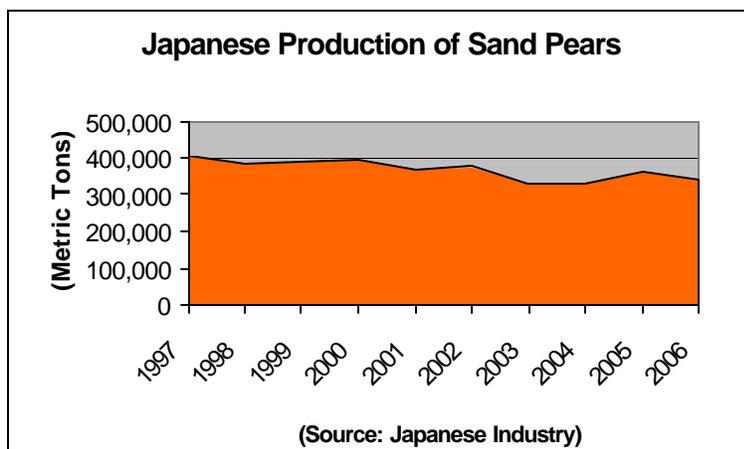
### Japan's Fresh Apple Exports Growing



Japan exported 18,858 metric tons of fresh apples in 2005 (from July 2005 to June 2006), up approximately 75 percent from the previous season. In recent years, the government of Japan (in cooperation with JETRO; Japan External Trade Organization) has been encouraging domestic growers to increase exports, arranging trade delegations to travel overseas for promoting Japanese fresh produce products. Over 99 percent of Japan's apple exports went to the neighboring

Asian countries, of which the majority went to Taiwan (approximately 95.7% of the total exports). *Aomori* prefecture shipped approximately 60 metric tons of *Fuji* apples to the United States in 2005. Japanese growers must complete USDA/APHIS inspections before exporting apples to the United States. *Aomori* expects a similar volume of shipment to the United States in 2006.

### The 2006 Japanese Crop of Sand Pears Expected to Decline 5 Percent



Japanese production of sand pears in 2006 is estimated at 343,300 metric tons, down approximately 5 percent from the previous year, according to industry sources. Fruit setting, which varied from region to region, was a little worse than average years. There are many small sized fruits in this season's crop due largely to a lack of sunlight in the summer. Harvesting time is expecting to be delayed a few days from the

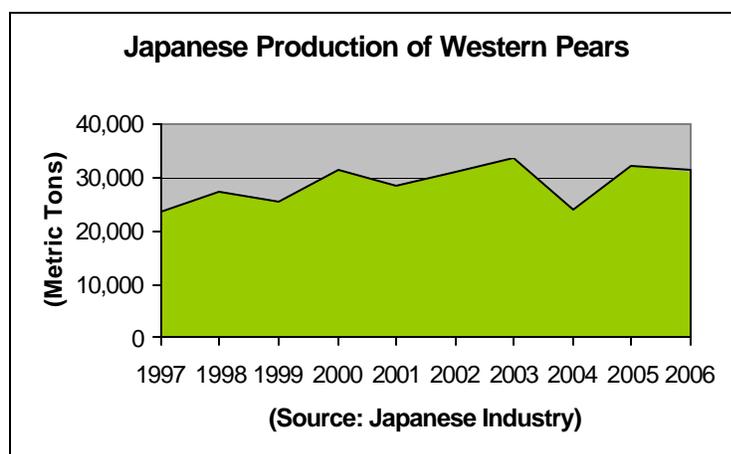
average year. Some regions experienced damage in their crop from a black spot disease as well as stinkbugs.

Harvesting for Japanese sand pears takes place in August and September in many regions. The *Kosui* and *Hosui* varieties, which are both large, light brown and extremely sweet, are the two major varieties, accounting for over two third of nation's sand pear production. *Kosui* is an early variety, while *Hosui* is a late one. The *Twentieth Century* variety, known as an extremely juicy and sweet fruit, is produced mainly in the *Tottori* prefecture, the Southwestern region of Japan. *Twentieth Century* pears are exported to the United States after USDA/APHIS inspections. Japan exported 367 metric tons of *Twentieth Century* pears to the United States in 2005. The *Niitaka* variety, known as a large pear, is also an important variety produced in Japan.

In late August, *Kosui* pears were trading at \$33.36 - \$35.93 (3,900 – 4,200 yen) for a 10-kilogram carton at the Tokyo Central Wholesale Market,

Tokyo supermarkets sold *Kosui* pears for \$1.35 (158 yen) for one large sized pear and \$5.81 (680 yen) for a plastic bag of six small sized pears. *Twentieth Century* pears were sold at \$6.67 (780 yen) for a tray of two large sized fruit.

### Japanese Western Pears Keep a Stable Production



Unlike sand pears, the Japanese industry expects marginal growth in western pear production. Japanese western pears are still a minor crop that account for only 8.1 percent of the nation's pear production. Japan produced 32,200 metric tons of western pears in 2005, up approximately 35 percent from the previous season when the crop was significantly damaged by typhoons. The harvesting area was 1,750 hectares, up one percent from the previous year. La France pear is

the most commonly grown variety in Japan, accounting for approximately 70 percent of the nation's western pear production. The Bartlett pear is a minor variety adding only 6 percent to the nation's output.

Like sand pear production, the Japan's 2006 western pear production is expected to be marginally less than the level of 2005 production, due to the lack of sunlight that the growing region experienced in the summer. Japan continues to ban imports of U.S. pears due to phytosanitary concerns.

### Japanese 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.

### The Positive List System Became Effective on May 29, 2006

On May 29, 2006 Japan implemented new regulations on maximum residue limits (MRLs) for agricultural chemicals. The MRLs of agricultural chemicals applied to deciduous fruit products may be found in the following web site:

<http://www.m5.ws001.squarestart.ne.jp/foundation/search.html> (English)

Related information on the positive list system may be found in GIN reports JA6011, JA6025 and JA6027.

## Tables

Table 1 - The 2006 Crop Forecast of Table Grapes of 22 Major Prefectures

Varieties	Harvest Area (HA)	Production (MT)	Changes from the Previous Year	
			Harvest Area	Production
<b>Total (22 Prefectures)</b>	<b>12,674</b>	<b>154,312</b>	<b>No Changes</b>	<b>- 1 %</b>
Delaware	2,642	30,174	- 1 %	- 1 %
Campbell	497	5,861	- 2 %	- 4 %
Kyoho	4,281	51,824	- 1 %	- 2 %
Pione	1,649	19,060	+ 5 %	+ 5 %
Muscat Bailey-A	521	7,254	- 2 %	- 4 %
Koshu	449	6,640	- 5 %	- 7 %
Kaiji	322	5,018	- 4 %	- 6 %
Other Varieties	2,313	28,508	No Changes	No Changes

Source: Japanese Industry

Table 2 - The 2006 Crop Forecast of Sand Pears of 29 Major Prefectures

Varieties	Harvest Area (HA)	Production (MT)	Changes from the Previous Year	
			Harvest Area	Production
<b>Total (29 Prefectures)</b>	<b>12,418</b>	<b>271,741</b>	<b>- 2 %</b>	<b>- 5 %</b>
Kosui	5,059	103,415	- 1 %	- 4 %
Hosui	3,107	83,283	- 2 %	- 6 %
Niitaka	922	23,038	- 3 %	- 9 %
Twentieth Century	1,707	31,156	- 4 %	- 8 %
Other Varieties	1,623	30,849	+ 3 %	- 1 %

Source: Japanese Industry

## PS&amp;D Tables and Trade Matrices

## Fresh Apple PS&amp;D Table

PSD TABLE						
Country	Japan					
Commodity	Apples, Fresh				(HA)(1000 TREES)(MT)	
	2004	Revised	2005	Estimate	2006	Forecast
	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate[New]
Market Year Begin		07/2004		07/2005		07/2006
Area Planted	43700	43700	43300	43200	0	42700
Area Harvested	41300	41300	41000	40800	0	40300
Bearing Trees	41300	41300	41000	40800	0	40300
Non-Bearing Trees	2400	2400	2300	2400	0	2400
Total Trees	43700	43700	43300	43200	0	42700
Commercial Production	667100	667100	780000	724100	0	770000
Non-Comm. Production	87500	87500	90000	94800	0	90000
TOTAL Production	754600	754600	870000	818900	0	860000
TOTAL Imports	17	17	0	124	0	100
TOTAL SUPPLY	754617	754617	870000	819024	0	860100
Domestic Fresh Consump	598881	598881	710000	655166	0	700100
Exports, Fresh Only	10736	10736	15000	18858	0	25000
For Processing	145000	145000	145000	145000	0	135000
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	754617	754617	870000	819024	0	860100

## Fresh Apple Export Trade Matrix

EXPORT TRADE MATRIX			
Country	Japan		
Commodity	Apples, Fresh		
Time Period	July-June	Units:	Metric Tons
Exports for:	2004		2005
U.S.	55	U.S.	60
Others		Others	
Taiwan	10099	Taiwan	18056
Hong Kong	199	Hong Kong	325
Thailand	158	Thailand	201
China	115	China	81
Singapore	30	Singapore	53
Indonesia	30	Indonesia	43
French Oceania	20	French Oceania	17
Russia	13	Guam	11
Guam	11	Russia	1
Total for Others	10675		18788
Others not Listed	6		10
Grand Total	10736		18858

Fresh Apple Import Trade Matrix

<b>IMPORT TRADE MATRIX</b>			
Country	Japan		
Commodity	Apples, Fresh		
Time Period	July-June	Units:	Metric Tons
Imports for:	2004		2005
U.S.	0	U.S.	0
Others		Others	
Australia	15	Australia	124
South Korea	2		
Total for Others	17		124
Others not Listed	0		0
Grand Total	17		124

## Fresh Apple Wholesale Price Table

PRICES TABLE			
Country	Japan		
Commodity	Apples, Fresh		
Prices in	Yen	per uom	KG
Year	2005	2006	% Change
Jan	281	219	-22%
Feb	265	221	-17%
Mar	273	229	-16%
Apr	297	254	-14%
May	335	302	-10%
Jun	354	320	-10%
Jul	341	332	-3%
Aug	338		-100%
Sep	256		-100%
Oct	235		-100%
Nov	231		-100%
Dec	216		-100%
Exchange Rate	115.18\$	Local Currency/US	
Date of Quote	08/04/2006	MM/DD/YYYY	

## Fresh Pear PS&amp;D Table

PSD TABLE						
Country	Japan					
Commodity	Pears, Fresh				(HA)(1000 TREES)(MT)	
	2004	Revised	2005	Estimate	2006	Forecast
	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate[New]
Market Year Begin		07/2004		07/2005		07/2006
Area Planted	18120	18120	17800	17840	0	17560
Area Harvested	17230	17230	16930	16950	0	16670
Bearing Trees	4310	4310	4260	4240	0	4170
Non-Bearing Trees	220	220	190	220	0	220
Total Trees	4530	4530	4450	4460	0	4390
Commercial Production	321500	321500	353100	360300	0	342800
Non-Comm. Production	30400	30400	33900	33300	0	31700
TOTAL Production	351900	351900	387000	393600	0	374500
TOTAL Imports	266	266	100	165	0	200
TOTAL SUPPLY	352166	352166	387100	393765	0	374700
Domestic Fresh Consump	349845	349845	384750	391341	0	372350
Exports, Fresh Only	1971	1971	2000	2074	0	2000
For Processing	350	350	350	350	0	350
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	352166	352166	387100	393765	0	374700

Fresh Pear Export Trade Matrix

EXPORT TRADE MATRIX			
Country	Japan		
Commodity	Pears, Fresh		
Time Period	July-June	Units:	Metric Tons
Exports for:	2004		2005
U.S.	371	U.S.	368
Others		Others	
Taiwan	1107	Taiwan	856
Hong Kong	398	Hong Kong	762
China	29	Canada	28
Canada	28	China	23
Australia	17	Thailand	18
Singapore	12	Singapore	12
Guam	4	Guam	5
Thailand	4		
Total for Others	1599		1704
Others not Listed	1		2
Grand Total	1971		2074

Fresh Pear Import Trade Matrix

IMPORT TRADE MATRIX			
Country	Japan		
Commodity	Pears, Fresh		
Time Period	July-June	Units:	Metric Tons
Imports for:	2004		2005
U.S.	0	U.S.	0
Others		Others	
South Korea	266	South Korea	165
Total for Others	266		165
Others not Listed	0		0
Grand Total	266		165

## Fresh Pear Wholesale Price Table

PRICES TABLE			
Country	Japan		
Commodity	Pears, Fresh		
Prices in	Yen	per uom	KG
Year	2005	2006	% Change
Jan	327	209	-36%
Feb	308	196	-36%
Mar	272	176	-35%
Apr	197	173	-12%
May	564	223	-60%
Jun	1227	952	-22%
Jul	483	440	-9%
Aug	270		-100%
Sep	207		-100%
Oct	164		-100%
Nov	177		-100%
Dec	228		-100%
Exchange Rate	115.18	Local Currency/US \$	
Date of Quote	08/04/2006	MM/DD/YYYY	

## Fresh Table Grape PS&amp;D Table

PSD TABLE						
Country	Japan					
Commodity	Grapes, Table, Fresh					
	2004	Revised	2005	Estimate	2006	Forecast
	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate[New]
Market Year Begin		01/2005		01/2006		01/2007
Area Planted	20400	20200	20400	20200	0	20100
Area Harvested	19200	19100	19200	19100	0	19000
Commercial Production	204600	200200	205000	198200	0	196100
Non-Comm. Production	19700	19300	20000	19100	0	18900
TOTAL Production	224300	219500	225000	217300	0	215000
TOTAL Imports	14000	11000	14000	10000	0	10000
TOTAL SUPPLY	238300	230500	239000	227300	0	225000
Domestic Fresh Consump	213190	205340	213880	202100	0	199750
Exports, Fresh Only	110	160	120	200	0	250
For Processing	25000	25000	25000	25000	0	25000
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	238300	230500	239000	227300	0	225000

Fresh Table Grape Export Trade Matrix

EXPORT TRADE MATRIX			
Country	Japan		
Commodity	Grapes, Table, Fresh		
Time Period	Jan.-Dec.	Units:	Metric Tons
Exports for:	2004		2005
U.S.	0	U.S.	0
Others		Others	
Taiwan	68	Taiwan	95
Hong Kong	26	Hong Kong	51
Singapore	3	Singapore	8
Total for Others	97		154
Others not Listed	1		1
Grand Total	98		155

Fresh Table Grape Import Trade Matrix

IMPORT TRADE MATRIX			
Country	Japan		
Commodity	Grapes, Table, Fresh		
Time Period	Jan.-Dec.	Units:	Metric Tons
Imports for:	2004		2005
U.S.	4642	U.S.	2834
Others		Others	
Chile	9119	Chile	7945
Taiwan	81	Mexico	81
Mexico	17	Taiwan	80
New Zealand	14	New Zealand	15
Total for Others	9231		8121
Others not Listed	0		0
Grand Total	13873		10955

## Fresh Table Grape Wholesale Price Table

PRICES TABLE			
Country	Japan		
Commodity	Grapes, Table, Fresh		
Prices in	Yen	per uom	KG
Year	2005	2006	% Change
Jan	649	460	-29%
Feb	614	457	-26%
Mar	836	564	-33%
Apr	2789	2487	-11%
May	1605	1789	11%
Jun	976	1119	15%
Jul	854	866	1%
Aug	579		-100%
Sep	511		-100%
Oct	458		-100%
Nov	562		-100%
Dec	481		-100%
Exchange Rate	115.18	Local Currency/US \$	
Date of Quote	08/04/2006	MM/DD/YYYY	