USDA Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network
Template Version 2.09

Required Report - public distribution

Date: 9/30/2004

GAIN Report Number: RS4054

Russian Federation

Fresh Deciduous Fruit

Annual Report

2004

Approved by:
Allan Mustard
U.S. Embassy

Prepared by:
Yelena Vassilieva and Dorothy Adams

Report Highlights:
The apple and pear crop is forecast down for the second year in a row to 1.74 million metric tons (mmt) due to losses from spring frosts in Stavropol and Krasnadar and continued summer rain in the black earth and central regions of the European part of the country. The usual seasonal decrease in prices has been less noticeable this year due to continuing demand from juice processors. Along with increasing incomes in big cities, opportunities for fruit imports are increasing, although competition is strong.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Annual Report
Moscow [RS1]
[RS]

Table of Contents

Seed Type Fruit Production

Only aggregated apple, pear, and quince data is available under the category "seed type fruits." Production decreased from 2.04 mmt in 2002 to 1.77 mmt in 2003, including, based on Post's calculations, 1.49 mmt of apples and 0.28 mmt of pears. Private orchards produced 1.22 mmt of all seed type fruits (over 69 percent of the total), while industrial orchards (collective enterprises) produced only 533,920 metric tons (30 percent of the total). Commercial industrial production is concentrated in the Central, Southern, and Volga Valley Economic Districts. Small collective enterprises produced less than 17,000 metric tons and private peasants enterprises produce only 5,000 metric tons.

Grape production

According to official data, the grape crop is expected to reach a record 390,000 - 400,000 metric tons in MY 2004/05, 25 percent more than last year. It will meet domestic demand from the wine industry (the demand of this industry is estimated at 280,000 – 300,000 metric tons) and will supply roughly seventy percent of the fresh produce market. In MY 2003, the crop was 315,000 metric tons, of which 278,000 tons were processed into wine and 37,000 metric tons were consumed fresh. The fresh grape market is growing, but weather uncertainties mean domestic production will not be able to keep up with demand. Additionally the absence of adequate storage, cooling and transportation facilities, results in the loss of roughly one-third of the crop annually. In the larger cities, consumers prefer to pay more for higher quality and better looking imported grapes. So, imports are expecting to continue increasing.

Fresh Fruits Consumption

There is no official data on consumption of fresh fruit in Russia, so estimates are based on aggregated production and trade data. Based on Russia's average per capita consumption, total fresh fruit consumption is estimated at approximately 5.3 – 5.4 mmt, including 3.2 mmt of imported fresh fruits. Apples remain the main fresh fruit consumed by Russians. Most people get fresh apples from their (or their relatives') small private orchards and in many regions, weather and climate put natural limits on apple production. Fresh apple consumption is estimated at 920,000 – 930,000 metric tons and this level is rather stable. In the Urals, Siberia, and the Far East, most apples are grown in small private orchards for fresh consumption and any excess is used for homemade jams and compotes. In the European part of the country and the Volga Valley, commercial production of fruits is larger and supplies not only the fresh market, but also some processors. Most apples produced in Russia are summer apples that cannot be stored and along with the development of the production of apple juice concentrates, the share of commercial apples in processing is increasing. In Moscow, St. Petersburg, and a few other cities, fresh produce consumption consists mostly of higher priced imported fruits.

According to experts, the average per capita income of the Russian people increased in 2001 to a level that theoretically allows for the purchase of 119.5 kilograms of apples and 99.5 kilograms of citrus fruits a year, instead of 88.8 kilograms and 69.4 kilograms respectively in 1990. The actual per capita consumption of all fruits rebounded in 2001 to 37 kilograms, equal to the level of 1990, but forecasts based on "purchasing ability" show that if consumer preferences change, demand for fruits will increase faster than expected.

Processed Fruits: Fresh, Frozen, and Canned Fruits and Juices

Data on consumption of processed fruits is not available and data on production is available only occasionally. Domestic production of canned produce, including juices, began

rebounding in 1998. Many new private enterprises were created for production (canning) of juices, tomato sauces, chips, and fast frozen fruits and vegetables. These enterprises usually use imported raw materials and semi-processed products. There are about 1,000 enterprises in the canning industry now, including 148 big and medium-size units. The recent tendency is toward integrating processing and sales in one holding company. Recently, these holding companies began investing in a more reliable supply of raw materials, but this trend is still developing. Most holding companies still prefer to purchase fruits during harvest from farmers and to switch from region to region than to invest in production. Moreover, the most successful and best developing segment of the industry is the juice segment and most raw materials are imported.

The share of juices, nectars, and juice type products in the total volume of canned produce increased from 50 percent in 1998 to 80 percent in 2003. The table below shows that production of processed fruits and vegetables has increased from 375,200 metric tons (one conditional can in Russian statistics equals 0.4 kilograms) in 1998 to 1,863,200 metric tons in 2003. Production of canned fruits and juices increased more than seven times during this period.

Table 1. Production of Processed Fruits, Vegetables and Potatoes, 1998 – 2003

	1998	1999	2000	2001	2002	2003
Canned Fruits and Vegetables, million conditional cans*	938.0	1,160.0	1,636.0	2,488.9	3,742.9	4,658.0
Including:						
- canned fruits and juices	492.0	532.8	819.4	1,536.9	2,626.0	3,539.7
--- juices	423.8	340.0	705.4	1,418.7	2,506.3	3,418.3
------ vegetable juices	228.7	322.3	386.5	416.7	502.5	478.6
--------- tomato juices	142.9	186.9	214.5	278.1	371.3	346.3
Processed potato products, 1,000 MT	5.5	6.4	7.8	11.0	11.1	20.2
Fast Frozen Products, 1,000 MT	0.6	2.3	1.5	2.0	2.1	6.0
Dry Vegetables, 1,000 MT	0.4	0.8	0.95	0.57	0.63	0.49
Dry Potato, 1,000 MT	0.3	0.04	0.4	0.9	1.65	NA
Dry fruits, 1,000 MT	125	149	238	159	126	NA

* Conditional can – equals 400 grams
Source: “Food Processing Industry”, #6, 2004

Juices

Average annual per capita juice consumption in Russia is 12-14 liters, but varies significantly from region to region. In Moscow and St. Petersburg, it is approaching 30 liters (close to the European level) while in most other regions it is less than seven liters. Currently, the assortment of juices and juice-type products is very wide and can meet the needs of all population groups, including those on a controlled diet. This includes beverages with certain micronutrients and plant matter additives, as well as products made with milk.

Official data on juice production is not available and customs statistics do not separate data on imports of juices from imports of juice concentrates. According to the data of the Russian Union of Juice Producers, domestic juice production increased from 442 million liters in 1998 to 1.75 billion liters in 2003, while imports decreased from 208 million liters to 54 million liters. In 2003, domestic juice and juice type products comprised 97 percent of Russia’s 1.8 billion liter juice market. However, juice production itself is 80 percent dependent on imports of juice concentrates and purées. According to experts from the Ministry of Agriculture

(MinAg), Russia imports approximately 190,000 metric tons of juice concentrates a year. With the exception of apple and wild berry concentrates, all concentrates are imported.

Imports of ready-for-consumption juices represented by premium class juices from Europe, Moldova, Ukraine, Armenia, and Azerbaijan are restricted in favor of domestic producers by the inadequate level of harmonization between Russian and international standards. Russia is moving in the direction of harmonization, but mostly to favor exports of Russian products.

Experts think the future development of the juice market will be connected, first of all, to increasing juice consumption in the regions outside the major consuming areas of Moscow and St. Petersburg. This means that imports of juice concentrates will increase along with the expansion of big companies into these regions.

The development of juice production is characterized by increasing competition among and the enlargement of major juice companies. Eighty-eight percent of Russian juice production is concentrated in four companies: "Wimm-Bill-Dann Food Products" (Moscow), "Multon" (St. Petersburg and Moscow oblasts), Experimental Cannery "Lebedyanskiy" (Lipetsk oblast), and "Nidan-Foods" (Novosibirsk and Moscow oblasts). Recently, international companies Amtel Soft Drink (UK), "Glocken Gold" and "Eches-Granini" (Germany), "Coca-Cola" (US) and a few others have shown interest in investments or joint ventures. This decreases the product price, but eliminates customs payments and lowers transportation expenses. Some dairy companies have also started juice packing, especially during the winter when the supply of milk is lower. Recently, two famous beer companies (Krasnyy Vostok and Ochakovo brewery) expressed interest in juice production. These companies use only juice concentrates in their products. Fresh juice consumption is limited to "at-home" production in the apple-producing region and to some small niche markets of "premium" type products.

The juice market continues to expand rapidly, forty percent in 2002 and thirty percent in 2003. Industry experts attribute this slight slow down in growth to over development in the last two years, delays in the income growth of the population and competition between several big companies. Additionally, start-up costs are quite significant. Several million dollars are necessary to advertise and promote new juice brands. However, in 2002-2003 the juice market expanded faster than the markets for beer and bottled water. Research conducted in the eleven biggest cities of Russia showed that the company Wimm-Bill-Dann (major juices are "J7", "100% Gold", "Ryzhiy Up") remains the leader with somewhere between 25 and 35 percent of the market (data varies widely from source to source), followed by the company "Multon" from St. Petersburg (juices "Rich", "Dobryi", "Nico"), and the cannery "Lebedyanskiy" (juices "Ja", "Tonus", "Fruktovy Sad"). Other experts think that in 2003, the Cannery "Lebedynskiy" moved to first place.

The major juice producing companies are working to organize a stable supply of raw materials, including acquiring plants that produce juice concentrates. For example, in 2002 the company "Wimm-Bill-Dann" purchased a plant in Tula oblast with the capacity to produce 2,500 metric tons of apple concentrate a year. The Company "Lebedyanskiy" in 2003 acquired Lipetsk oblast's plant "Progress", the biggest producer of juice concentrates in the Russia. In 2002, "Progress" produced 3,500 metric tons of juice concentrate, but used only one third for juice production and sold the rest to other juice bottling plants. The plant "Progress" specializes in the production of juice concentrates from locally produced fruits and vegetables (apples, carrots, and currant) and "Lebedyanskiy" is planning to purchase 20-25 percent of the concentrates the company needs for its juice production from this plant. However, all of these companies, for the foreseeable future, will continue to import the lion share of necessary raw materials.

Trade

Most fresh fruits are imported. The share of imported fruit increased along with the volume, from 1.2 mmt in MY 1998/99 to 3.2 mmt in MY 2003/04. Apples and pears are the leading imported fresh fruit with 892,000 metric tons imported in the first eleven months of MY 2003/04, 3.6 times more than in MY 1998/99, followed by bananas and citrus fruit.

Table 2. Russia: Imports of Major Fruits and Nuts, MY 1998 - 2003

		MY 98/99	MY 99/00	MY 00/01	MY 01/02	MY 02/03	MY 03/04*
		Millions of US Dollars					
	08 EDIBLE FRUIT AND NUTS	445.5	506.1	735.6	715.9	900.7	1,154.3
		Metric Tons					
	08 EDIBLE FRUIT AND NUTS	1,185,884	1,391,494	2,037,947	2,238,665	2,618,311	3,230,099
0805	CITRUS,FRESH,DRIED	340,389	452,985	485,283	660,798	727,306	768,922
080510	Oranges	181,416	244,062	240,125	335,527	372,903	392,930
080520	Mandarins	66,476	99,787	109,549	151,392	173,757	197,260
080530**	Lemons and Lime	82,085	94,811	116,518	146,236	147,850	140,872
080540	Grapefruit	10,331	14,234	18,862	27,549	32,675	36,181
080590	Other Citrus Fruits	81	91	229	93	120	1,678
0803	BANANAS,PLANTAINS	352,297	436,566	579,227	636,394	674,253	790,606
0808	APPL,PEAR,QNCE,FRSH	243,954	227,146	440,342	476,213	633,146	891,861
080810	Apples	174,681	149,373	335,109	333,263	443,563	669,900
080820	Pears and Quinces	69,273	77,774	105,233	142,950	189,583	221,961
0806	GRAPES,FRESH,OR DRIED	54,483	69,964	132,532	147,556	165,853	219,301
080610	Grapes, Fresh	33,164	28,073	79,377	103,536	107,787	162,696
080620	Grapes, Dried, Raisin	21,318	41,891	53,155	44,019	58,065	56,605
0810	OTHER FRESH FRUIT	19,639	26,454	103,753	50,052	102,681	144,294
0813	OTHER DRIED	28,222	29,044	96,546	73,014	82,482	76,228
0809	VARIOUS FRESH FRUIT	38,206	46,757	70,963	73,070	82,406	94,528
0807	MELON,PAPAYAS,FRESH	85,269	58,482	72,113	44,071	50,492	137,099
0804	DATE,FIG,PINEAPPLE,ET	10,168	17,109	20,857	34,737	48,307	46,493
0802	OTHER NUT,FRESH,DRIED	6,665	12,330	19,743	19,848	19,022	28,862
0801	COCO,BRAZL,CASHW NUTS	2,711	5,000	6,924	10,542	16,248	14,001
0811	FRUIT+NUTS,FROZEN	2,476	7,123	8,177	9,335	12,712	15,097
0812	TEMPORARILY PRESERVED	1,404	2,429	1,421	3,028	3,391	2,701
0814	PEEL,CITRUS/MELON	1	106	67	7	12	106

* July 2003 – May 2004
** Starting 2001, HS number 080550 (Lemons and Limes, Fresh or Dried) was added and data for MY 2002 and 2003 includes both categories of lemons and limes
Source: World Trade Atlas

According to the Russian Fruit and Vegetable Alliance, twenty-five percent of all fruits and vegetables arriving by train and ten percent of all fruits and vegetables arriving by ship come from the Netherlands. Due to storage facilities belonging to large international fruit companies, the Netherlands has become the transit point for many tropical fruits and determining the actual country of origin can be difficult.

Table 3. Average Import Price of 1 Metric Ton of Fresh Deciduous Fruits, USD

Fruits	MY 1999	MY 2000	MY 2001	MY 2002	MY 2003
Oranges	286	278	308	332	346
Grapefruits	282	295	299	312	319
Mandarins	700	609	683	713	554
Lemons	289	279	316	361	380
Bananas	401	288	290	328	340
Apples	354	358	301	312	329
Pears	253	277	321	349	370
Grapes	566	658	407	473	531

Policy

The program of federal compensation for a part of new orchard investments approved in 2003 (see GAIN RS3029) was not effective for fruit orchards. With the reorganization of the GOR and the resulting decrease in allocations for agriculture, there is very little chance this program will continue.

Marketing

Fruit trading companies are consolidating their capital and investing in better equipment, warehouses, and transportation. Although the shares of the three main fruit trading companies ("JFC", "Sunway Traders" and "Sorus") are changing, their combined share of the market is estimated to exceed eighty percent. These companies have steady relationships with foreign suppliers based on good prices and delivery convenience. The smaller fruit importing companies usually unite to freight a ship and then distribute it throughout the country. For foreign traders the main barriers to entry are non-transparent sanitary and phytosanitary requirements and conformity certification procedures which only experienced Russian based companies can easily comply with. Along with the reorganization of the quarantine service, the requirements for importing fruits may become more complicated.

Prices

For most fruits, domestic prices are based on the import price plus eighteen percent VAT, storage and transportation expenses, and trader's margin which varies by region. Consumer incomes are becoming a more important factor in fruit trade. Data on domestic prices of apples are given in Table 11. In 2002, Vladivostok had the highest prices, but in 2003 Tyumen and Novosibirsk (regions with growing incomes) became the leader and in June 2004 Moscow took the lead even though transportation expenses are lower in Moscow than in the other regions.

Based on the moderate apple crop forecast for the EU, the price of apples from France, Italy, and Belgium will not change significantly, while a larger forecast crop in Poland will push prices down. However, given that Poland is now in the EU currency zone, the price of imported apples will also depend on the rate of exchange (initial estimates of the EU crop are released ahead of 2004 Prognosfruit Congress held this year in the Polish city of Lublin on August 6-7 – Agra-Europe July 16, 2004).

Apples

Table 4. PSD, Apples, Metric Tons

PSD Table						
Country	Russian Federation					
Commodity	Apples, Fresh				(HA)(1000 TREES)(MT)	
	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		07/2002		07/2003		07/2004
Area Planted	426600	426600	430000	422200	0	420000
Area Harvested	361600	361600	370000	357900	0	35700
Bearing Trees	136000	136000	136000	135000	0	134900
Non-Bearing Trees	26000	26000	27000	26000	0	26000
Total Trees	162000	162000	163000	161000	0	160900
Commercial Production	1150000	1150000	1050000	1143800	0	1100000
Non-Comm. Production	572500	572500	345000	345000	0	400000
TOTAL Production	1722500	1722500	1395000	1488800	0	1500000
TOTAL Imports	443563	443563	510000	689000	0	680000
TOTAL SUPPLY	2166063	2166063	1905000	2177800	0	2180000
Domestic Fresh Consump	920136	920136	920000	925000	0	920000
Exports, Fresh Only	984	984	1000	1885	0	1000
For Processing	1209100	1209100	970000	1236800	0	1245000
Withdrawal From Market	35843	35843	14000	14115	0	14000
TOTAL UTILIZATION	2166063	2166063	1905000	2177800	0	2180000

Table 5. Apples – Area Planted, Harvested, Production and Yield, Main Producing Regions, MY 2003

	Planted	Harvested	Production	Yield
	1,000 ha	1,000 ha	1,000 tons	T/ha
Russia	422.2	357.9	1 488.8	4.2
Central Federal District	184.9	161.2	451.0	2.8
- Bryansk	15.3	15.1	15.0	1.0
- Voronezh	28.5	24.5	101.6	4.2
- Kursk	14.4	13.3	62.4	4.7
- Lipetsk	16.8	13.5	51.9	3.8
- Moscow	10.4	10.3	25.7	2.5
- Orel	14.5	11.6	12.6	1.1
- Tula	23.0	19.0	31.9	1.7
Southern Federal District	99.0	80.5	612.0	7.6
- Krasnodar	28.2	20.8	237.5	11.4
- Volgograd	12.9	11.5	128.7	11.1
- Rostov	17.9	15.1	79.4	5.3
Volga Valley Federal District	89.7	73.2	297.2	4.1
- Tatarstan	9.5	6.3	4.0	0.6
- Samara	15.4	12.7	116.8	9.2
- Saratov	12.6	11.1	110.1	9.9
Ural Federal District	11.5	9.3	35.3	3.8
Siberian Federal District	17.1	13.2	58.2	4.4
Far East Federal District	2.8	2.0	8.5	4.2

Table 6. Export Trade Matrix for Apples, MY 2002-2004, Metric Tons

Export Trade Matrix			
Country	Russian Federation		
Commodity	Apples, Fresh		
Time Period		Units:	Metric Tons
Exports for:	2002		**2003**
U.S.		U.S.	
Others		Others	
Kazakhstan	471	Kazakhstan	1368
Country Unknown	369	Country Unknown	438
Estonia	125	Azerbaijan	43
Uzbekistan	8	Uzbekistan	30
Turkmenistan	7	Tajikistan	5
Tajikistan	4	Mongolia	1
Total for Others	984		1885
Others not Listed			
Grand Total	984		1885

Table 7. Import Trade Matrix for Apples, MY 2002-2004, Metric Tons

Import Trade Matrix			
Country	Russian Federation		
Commodity	Apples, Fresh		
Time Period		Units:	Metric Tons
Imports for:	2002		**2003**
U.S.	1080	U.S.	2200
Others		Others	
Poland	138093	Poland	193000
China	92761	Moldova	112700
France	46195	China	97000
Argentina	39887	Azerbaijan	51800
Italy	24415	Argentina	44400
Belgium	23963	Chile	30725
Moldova	16233	France	30545
Chile	12870	Ukraine	22885
Azerbaijan	9882	Kazakhstan	18365
Netherlands	8836	Italy	16830
Total for Others	413135		618250
Others not Listed	29348		68550
Grand Total	443563		689000

Table 8. Imports of Apples in MY 2000-2003, by Thirty Main Countries, Metric Tons

		MY 2000/01	MY 2001/02	MY 2002/03	Jul 03-May 04
0	--The World--	335,109	333,263	443,563	669,900
1	Poland	11,015	95,032	138,093	192,540
2	China	41,066	49,842	92,761	96,224
3	France	37,306	36,753	46,195	30,543
4	Argentina	17,154	39,901	39,887	44,389
5	Italy	16,270	26,357	24,415	16,828
6	Belgium	22,858	16,998	23,963	14,025
7	Moldova	14,116	12,800	16,233	112,690
8	Chile	9,863	8,221	12,870	30,717
9	Azerbaijan	24,526	2,072	9,882	51,762
10	Netherlands	6,689	8,279	8,836	8,455
11	South Africa	3,570	4,853	7,848	7,353
12	Uzbekistan	10,512	4,648	4,906	3,317
13	Germany	3,437	5,778	4,138	4,761
14	Tajikistan	10,302	4,327	3,551	268
15	Kazakhstan	18,351	2,996	1,489	18,363
16	Country Unknown	579	664	1,312	609
17	Spain	161	710	1,258	2,412
18	Kyrgyzstan	8,240	2,271	1,251	2,551
19	United States	1,060	3,057	1,079	2,127
20	Greece	336	19	1,006	1,039
21	Iran	306	1,080	621	455
22	Uruguay	1	1	547	60
23	Austria	0	0	272	45
24	Hungary	15	78	217	207
25	Ukraine	8,694	128	193	22,884
26	Brazil	11	14	172	238
27	New Zealand	574	2,178	152	156
28	Portugal	0	0	119	39
29	Yugoslavia	645	25	96	869
30	Georgia	66,630	4,001	68	3,737

Table 9. Imports of Apples, MY 2003, by Months, by Country, Metric Tons

		07.03	08.03	09.03	10.03	11.03	12.03	01.04	02.04	03.04	04.04	05.04
	--The World--	42 962	20 792	36 476	56 190	53 318	69 696	67 761	77 942	95 406	81 755	67 602
1	Poland	583	380	363	383	953	4 178	29 659	41 640	52 953	37 199	24 249
2	Chile	4 247	25	22	12	0	0	1	5	530	10 739	15 135
3	Argentina	16 921	1 577	1	0	0	0	0	320	5 017	9 192	11 360
4	China	4 976	3 608	5 294	9 446	7 388	8 990	12 081	12 446	13 539	11 625	6 831
5	South Africa	3 954	731	193	39	11	0	0	0	3	149	2 272
6	Germany	109	0	0	2	53	63	180	292	913	1 215	1 933
7	France	1 979	61	1 557	2 075	2 811	3 987	4 224	3 647	5 456	3 349	1 396
8	Netherlands	1 252	62	139	343	724	772	951	745	1 066	1 124	1 279
9	Italy	2 962	31	46	393	1 040	1 077	1 980	2 812	2 890	2 562	1 035
10	Belgium	582	24	339	1 203	1 750	2 201	1 830	2 037	2 239	984	837
11	Moldova	1 756	10 531	18 934	25 497	18 514	19 320	5 657	5 479	4 845	1 665	492
12	Georgia	0	0	2	56	24	298	408	568	1 257	740	384
13	United States	142	0	0	300	114	418	183	329	423	133	84
14	Yugoslavia	0	0	0	191	185	216	108	37	0	56	74
15	Kazakhstan	1 410	1 491	1 745	3 652	4 007	3 329	1 582	489	279	313	66
16	Greece	0	0	0	0	86	445	36	239	138	38	58
17	New Zealand	59	43	1	2	0	0	0	0	0	21	30
18	Country Unknown	50	8	4	22	34	62	17	69	247	69	27
19	Austria	0	0	7	0	0	0	0	0	0	19	19
20	Spain	2	1	123	239	355	758	202	354	349	10	19
21	Armenia	0	0	0	0	22	0	0	0	23	0	18
22	Brazil	48	2	3	0	0	0	0	0	92	90	3
23	Azerbaijan	27	126	3 118	8 627	11 701	17 695	6 014	3 336	1 027	91	0
24	Australia	0	7	0	0	0	0	0	0	0	0	0
25	Hungary	0	0	0	71	18	40	60	18	0	0	0
26	Indonesia	0	0	0	0	0	0	0	0	3	0	0
27	Iran	0	0	0	0	17	6	56	141	82	155	0
28	Israel	0	0	0	0	0	0	0	0	4	0	0
29	Tajikistan	0	0	0	111	35	123	0	0	0	0	0
30	Turkey	0	0	0	5	7	22	10	0	0	0	0
31	Turkmenistan	32	0	0	0	0	0	0	0	0	0	0
32	Ukraine	522	1 392	3 496	2 525	3 051	5 130	2 235	2 568	1 815	149	0
33	Uruguay	0	0	0	0	0	0	0	0	20	39	0
34	Uzbekistan	1 300	583	744	376	131	96	38	39	0	10	0
35	Portugal	0	0	0	0	0	0	39	0	0	0	0
36	Russia	0	0	19	38	0	0	0	0	0	0	0
37	Kyrgyzstan	49	108	326	565	286	470	205	332	193	18	0

Source: World Trade Atlas

Table 10. Prices of Imported Apples, US Dollars per Metric Ton

Prices Table			
Country	Russian Federation		
Commodity	Apples, Fresh		
Prices in	US Dollar	per uom	Metric Ton
Year	2002	2003	% Change
Jan	295	302	2%
Feb	329	302	-8%
Mar	296	299	1%
Apr	303	310	2%
May	305	328	8%
Jun	331	339	2%
Jul	342	361	6%
Aug	326	387	19%
Sep	303	344	14%
Oct	297	324	9%
Nov	301	332	10%
Dec	321	333	4%

Table 11. Domestic Prices for Apples, Rubles per Kilogram.

Date	Min. price	City	Max. Price	City	Russia, average	Average in USD	Import price, USD per kg
Jul. 2002	18,13	Stavropol	42,42	Vladivostok	31,17	0,99	0,34
Aug. 2002	15,15	Krasnodar	42,80	Vladivostok	29,65	0,94	0,32
Sep. 2002	12,18	Voronezh	43,17	Vladivostok	28,13	0,89	0,30
Oct. 2002	13,48	Voronezh	44,08	Vladivostok	28,48	0,92	0,29
Nov. 2002	15,03	Voronezh	45,25	Vladivostok	30,03	0,94	0,30
Dec. 2002	17,09	Voronezh	45,67	Vladivostok, Novosibirsk	31,48	0,99	0,32
Jan. 2003	17,52	Lipetsk	45,94	Novosibirsk	32,35	1,02	0,30
Feb. 2003	19,02	Lipetsk	46,30	Novosibirsk	33,16	1,05	0,30
Mar. 2003	20,35	Lipetsk	46,34	Novosibirsk	33,39	1,06	0,30
Apr. 2003	20,18	Stavropol	46,56	Novosibirsk	33,52	1,07	0,31
May 2003	21,00	Stavropol	46,40	Novosibirsk	34,72	1,12	0,33
Jun. 2003	20,74	Stavropol	46,36	Novosibirsk	36,31	1,20	0,34
Jul. 2003	19,18	Stavropol	44,99	Novosibirsk	36,53	1,21	0,36
Aug. 2003	14,00	Stavropol	44,29	Tyumen	32,03	1,05	0,39
Sep. 2003	12,73	Stavropol	44,06	Tyumen	30,22	0,99	0,34
Oct. 2003	13,02	Stavropol	44,39	Tyumen	29,96	1,00	0,32
Nov. 2003	14,75	Krasnodar	44,80	Novosibirsk	30,72	1,03	0,33
Dec. 2003	15,69	Stavropol	45,46	Novosibirsk	31,72	1,08	0,33
Jan. 2004	17,51	Stavropol	45,23	Novosibirsk	33,06	1,16	0,31
Feb. 2004	18,95	Stavropol	45,85	Novosibirsk	33,62	1,18	0,30
Mar. 2004	18,57	Stavropol	46,07	Novosibirsk	33,60	1,18	0,30
Apr. 2004	17,91	Stavropol	45,80	Novosibirsk	33,54	1,16	0,33
May 2004	17,63	Stavropol	44,87	Novosibirsk	33,82	1,17	0,36
Jun. 2004	17,81	Stavropol	44,72	Moscow	35,13	1,21	NA
Jul. 2004	17,58	Stavropol	45,35	Novosibirsk	35,74	1,23	NA

Source: Torgovaya Gazeta

Pears

Table 12. PSD, Pears, Metric Tons

PSD Table						
Country	Russian Federation					
Commodity	Pears, Fresh			(HA)(1000 TREES)(MT)		
	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		07/2002		07/2003		07/2004
Area Planted	69000	69000	69100	69100	0	68500
Area Harvested	54000	54000	54300	54300	0	53800
Bearing Trees	17200	17200	17300	17300	0	17000
Non-Bearing Trees	10100	10100	10100	10100	0	10100
Total Trees	27300	27300	27400	27400	0	27100
Commercial Production	115000	115000	96000	113000	0	95000
Non-Comm. Production	207000	207000	130000	165400	0	140000
TOTAL Production	322000	322000	226000	278400	0	235000
TOTAL Imports	189583	189583	195000	226000	0	235000
TOTAL SUPPLY	511583	511583	421000	504400	0	470000
Domestic Fresh Consump	326500	326500	332000	335500	0	333000
Exports, Fresh Only	155	155	210	41	0	50
For Processing	152000	152000	80100	160169	0	130000
Withdrawal From Market	32928	32928	8690	8690	0	6950
TOTAL UTILIZATION	511583	511583	421000	504400	0	470000

Table 13. Pears – Area Planted, Harvested, Production and Yield, Main Producing Regions, MY 2003

	Planted	Harvested	Production	Yield
	1,000 ha	1,000 ha	1,000 tons	T/ha
Russia	66.1	51.9	278.4	5.4
Central Federal District	20.2	17.3	63.4	3.7
- Bryansk	0.8	0.8	0.9	1.1
- Voronezh	5.0	4.3	18.3	4.2
- Kursk	2.6	2.3	11.0	4.7
- Lipetsk	2.9	2.4	9.3	3.9
- Moscow	0.6	0.6	1.4	2.4
- Orel	0.7	0.6	0.6	1.0
- Tula	1.2	0.9	1.6	1.7
Southern Federal District	24.2	19.6	150.0	7.7
- Krasnodar	7.0	5.2	62.6	12.0
- Volgograd	2.3	2.1	22.8	11.1
- Rostov	4.5	3.8	21.5	5.7
Volga Valley Federal District	11.6	9.2	48.4	5.2
- Tatarstan	1.7	1.2	0.7	0.6
- Samara	2.7	2.3	20.6	8.9
- Saratov	2.2	2.0	13.5	6.6
Ural Federal District	0.6	0.5	3.6	7.6
Siberian Federal District	0.0	0.3	0.7	2.8
Far East Federal District	0.2	0.1	0.5	5.3

Table 14. Export Trade Matrix for Pears, MY 2002-2004

Export Trade Matrix			
Country	Russian Federation		
Commodity	Pears, Fresh		
Time Period		Units:	Metric Tons
Exports for:	2002		**2003**
U.S.		U.S.	
Others		Others	
Kazakhstan	129	Kazakhstan	22
Turkmenistan	15	Country Unknown	11
Country Unknown	10	Azerbaijan	6
Uzbekistan	1	Tajikistan	1
		Uzbekistan	1
Total for Others	155		41
Others not Listed			
Grand Total	155		41

Table 15. Import Trade Matrix for Pears

Import Trade Matrix			
Country	Russian Federation		
Commodity	Pears, Fresh		
Time Period		Units:	Metric Tons
Imports for:	2002		**2003**
U.S.	946	U.S.	2290
Others		Others	
Argentina	59872	Argentine	61200
Belgium	32127	Belgium	40200
China	29299	China	35000
Netherlands	16606	Netherlands	25600
France	12042	Spain	14000
Poland	9042	France	10000
South Africa	7505	Chile	7900
Spain	7232	South Africa	7600
Portugal	6980	Kazakhstan	4100
Chile	1728	Kyrgyzstan	3250
Total for Others	182433		208850
Others not Listed	6204		14860
Grand Total	189583		226000

Table 16. Imports of Pears in MY 2000-2003, by Thirty Main Countries, Metric Tons

		MY 2000/01	MY 2001/02	MY 2002/03	Jul 03-May 04
0	--The World--	105 233	142 950	189 583	221 961
1	Argentina	20 640	42 329	59 872	61 181
2	Belgium	18 228	16 050	32 127	40 191
3	China	11 919	15 096	29 299	34 713
4	Netherlands	19 906	8 169	16 606	25 596
5	France	4 313	15 440	12 042	9 912
6	Poland	555	3 174	9 042	2 784
7	South Africa	4 206	5 204	7 505	7 596
8	Spain	5 269	15 891	7 232	13 660
9	Portugal	1 181	6 542	6 980	995
10	Chile	4 948	7 089	1 728	7 854
11	Italy	190	2 421	1 482	844
12	Uzbekistan	1 761	1 208	1 325	1 339
13	Tajikistan	2 663	881	1 262	121
14	United States	442	657	946	2 287
15	Turkey	95	885	671	1 117
16	Germany	42	50	507	561
17	Kyrgyzstan	2 063	717	363	3 227
18	Kazakhstan	1 963	1 024	138	4 075
19	Country Unknown	51	32	92	34
20	Moldova	318	27	82	1 267

Table 17. Prices of Imported Pears

Prices Table			
Country	Russian Federation		
Commodity	Pears, Fresh		
Prices in	US Dollars	per uom	Metric Ton
Year	2002	2003	% Change
Jan	315	334	6%
Feb	334	344	3%
Mar	356	364	2%
Apr	347	364	5%
May	310	370	19%
Jun	359	375	4%
Jul	345	371	8%
Aug	345	386	12%
Sep	326	362	11%
Oct	321	352	10%
Nov	333	357	7%
Dec	343	352	3%