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United Kingdom

Fresh Deciduous Fruit

Annual

2002

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Report Highlights:
UK apple production in MY2002 is forecast at 134,200 MT, a considerable decrease on MY2001 production, following poor weather during the early growing season. Production is on a downwards trend over the long term, with a greater reliance on imports to supply the relatively stable demand for apples. Red and bi-color U.S. apples are viewed as high quality fruit and command a price premium in a sector of the fresh produce industry which is increasingly competitive. U.S. pear shipments to the UK showed a dramatic improvement in fortunes in MY2001, albeit from a low base, following a shortfall in EU supplies.

Includes PSD changes: Yes
Includes Trade Matrix: No
Annual Report
London [UK1], UK

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Executive Summary

MY2001 (Jul 01 - Jun 02) was considered a good harvest by the UK apple trade, with final production of 169,140 MT and most fruit of good quality. The current crop prospects vary depending on region and variety, but with the key culinary and dessert varieties both enduring poor early season growing conditions, total production is forecast to fall significantly to 134,200 MT. Secondary varieties have performed better, with growers expecting full crops, although uncertainty over the final quality of the fruit persists. At 34,500 MT, the UK pear harvest is expected to be similar to last year in terms of volume, but once again, there are concerns over fruit quality.

Supermarkets dominate sales of fresh produce in the UK, including apples and pears. However, these multiple retailers have also been at the forefront of segmenting the market and new packaging development which have contributed to value growth of the market despite relatively static consumption.

The UK is reliant on imports to meet demand for apples. The key suppliers are France, New Zealand and South Africa, with the U.S. traditionally the fourth largest supplier. However, the U.S. faces competition for the fourth place from Italy and Chile, with both shipping increased volumes of apples in MY2001. U.S. apples, especially organic fruits, continue to attract a premium price in the UK.

Global pear shipments to the UK fell significantly in MY2001 following a poor harvest in the Benelux countries, which are traditionally the key suppliers of pears. However, U.S. pear exports increased dramatically in both volume and value as a result, although Post does expect these gains to recede in MY2002.

With imports competing alongside domestic supplies for retail sales, promotional support is inevitably a characteristic of the UK apple market. Many organizations carry out country and variety specific promotions to raise awareness among the trade and consumers. The extent of these marketing activities are illustrative of the competition U.S. apples and pears face in the UK market, in addition to unfavorable exchange rates and shifting demand for new varieties and smaller apples. The most recent threat to U.S. apples was the inclusion of apples on a list of products due for a 100 percent duty as part of the European Commission's response to U.S. steel policy. Although uncertainty about the EC's future actions persist, the fresh produce trade considers U.S. concessions for European steel as a move towards alleviating the threat of sanctions.

The UK marketing year runs from July 1 through June 30.

The exchange rate used to convert British Pound Sterling (BPS) to U.S. dollars is 1 BPS = US $1.5 throughout.

SECTION 1: SITUATION AND OUTLOOK

Production

Apples

MY2001 production figures have been revised downwards to 169,140 MT by the UK's Department for Environment, Food and Rural Affairs (DEFRA) as a result of new data obtained from the Orchard Fruit Survey. Data from the survey supercedes the earlier DEFRA estimate of 176,133 MT based on regional crop reports. MY2001 production was 4 percent up on MY2000 production, but the long term trend in top fruit production in the UK is downwards. This was particularly illustrated by the significant drop in planted area of apples from 11,450 ha to 9,970 ha between MY2000 and MY2001. This long term trend seems unlikely to reverse with further reports of orchards, particularly those producing Fiesta and Jonagold apples, being taken out of production through MY2001. The key reason behind declining UK production is the increased levels of competition from EU and third country apple suppliers.

Harvested Production by Variety (1,000 MT)

Variety	MY 1998	MY 1999	MY 2000	MY 2001
Dessert apples:				
Cox	63.3	76.8	46.1	64.3
Worcester Pearmain	3.7	3.7	3.6	2.6
Discovery	6.2	6.9	4.6	3.7
Early Season	2.9	2.9	1.2	1.3
Mid Season Desserts	9.3	8.3	8.5	7.3
Late Season Desserts	30.4	36.8	35.5	30
Total Dessert Apples	115.8	135.4	99.5	109.2
Culinary apples:				
Bramleys Seedling	83.2	70.4	60.3	58
Other Culinary	3.5	3.1	2.3	1.9
Total Culinary Apples	86.7	73.5	62.6	59.9
Total Apples	202.5	208.9	162.1	169.1

Source: Department for Environment, Food and Rural Affairs (DEFRA)
Figures may not tally due to rounding.

Planted Area by Variety (Hectares)

Variety	MY 1998	MY 1999	MY 2000	MY 2001
Dessert apples:				
Cox	4730	4352	4186	3489
Worcester Pearmain	287	278	283	207
Discovery	531	529	484	420
Early Season	260	239	248	258
Mid Season Desserts	595	545	580	550
Late Season Desserts	1656	1752	1882	1708
Total Dessert Apples	8059	7695	7662	6630
Culinary apples:				
Bramleys Seedling	4932	4887	3561	3100
Other Culinary	274	235	234	241
Total Culinary Apples	5205	5122	3795	3340
Total Apples	13264	12817	11457	9970

Source: DEFRA

Early indications for the 2002 crop vary depending on region and variety. The key culinary apple variety, Bramley's Seedling, and the key dessert variety, Cox, have shared early season setbacks. Poor weather conditions in the UK for most of spring and early summer coincided with early blossom in many orchards, giving a reduced fruit set even within orchards. In addition, wet and windy weather made it difficult for some growers to maintain a regular spray program, hence the appearance of apple scab in many orchards. Inadequate fertilization of some flowers has resulted in a drop of fruitlets ("the June Drop") which is likely to reduce crop potential. In contrast to last season, fruit size is promising although question marks remain over fruit quality. Current crop expectations for both of these key varieties are for a less than full crop and regional horticultural committees are forecasting further downward revisions as the season progresses. With warmer weather in the UK towards the end of July, Bramley crops have sized well and the first fruits were harvested during the last few days of July.

Other varieties have fared better. In most regions, a good blossom has resulted in a fruit set sufficient for a full crop of Discovery, Worcester Pearmain and Gala with individual fruit size reported as good. However, some crops remain at risk from high levels of russet, scab and bitter pit and growers have genuine concerns about the likely fruit quality at harvest. Overall, with the importance of Bramley's Seedling and Cox to total apple production (Bramley's Seedling account for 95 percent of culinary apples and Cox account for 60 percent of dessert apples), UK supplies are forecast to fall significantly compared to MY2001 production, hence Post's forecast production of 134,200 MT for the MY2002 crop. However, the fact that last season was a high volume crop year, means that in line with the natural cycle of the trees, many will be producing less fruit this year.

Pears

MY2001 production was better than originally forecast. Many Conference pears were harvested late and rapidly increased in size prior to picking, although the late harvest also created some problems with fruit going soft once removed from store. Expectations of light yields proved to be unfounded and most growers reported generally good yields of high quality fruit. DEFRA's revised estimate of UK pear production for MY2001 is 34,971 MT, an increase of 2.8 percent on MY2000 production.

Following the MY2001 crop, growers have already questioned the quality of the current crop. Conference, the key UK pear variety, is giving most cause for concern with fruitlets reported as heavily russeted with cracking in some regions. But as with apple producers, there are regional differences in the UK crop, with growers in the South East reporting a good skin finish on most crops. The Comice pear crop appears set to increase fruit yield significantly following a disappointing harvest last year, although fruit size is developing slowly at present. The performance of Comice pears will have little impact on total pear production, as the sector is dominated by the Conference variety, which accounts for almost 95 percent of domestically supplied pears. In terms of volume, the current UK crop is forecast to be similar to the 2001 crop at approximately 34,500 MT.

Harvested Production by Variety (1,000 MT)

Variety	MY 1998	MY 1999	MY 2000	MY 2001
Conference	25.5	15.8	29.6	32.9
Comice	2.2	1.2	3.3	1.5
Others	1.0	1.1	1.1	0.6
Total Pears	28.7	18.1	34.0	35.0

Source: DEFRA

Planted Area by Variety (hectares)

Variety	MY 1998	MY 1999	MY 2000	MY 2001
Conference	1788	1824	1862	1903
Comice	390	267	283	253
Others	285	233	209	174
Total Pears	675	500	492	427

Source: DEFRA

Consumption

Apples

Fresh fruit consumption in the UK has increased for much of the last twenty five years . However, apple consumption has drifted slowly downwards in that time period, as the UK public have switched to alternative fruits in their diet. Increased availability, variety and quality have been the key drivers in this shift in consumption patterns. However, apple consumption did increase again in 1999/2000 and consumption is fairly stable at 9.5 kg per capita per annum, depending on supplies. Apples are the second most popular fruit, behind bananas, and Mintel estimated the retail market for apples at US $920 m in CY2000. Many of the leading fruits (bananas, apples, citrus fruit) have arguably taken on a commodity status over recent years but through the introduction of new varieties and innovative pack and presentation types, some degree of fragmentation has been brought into the market and helped maintain apple market share in the competitive fruit sector.

As with most foodstuffs, it is the multiple supermarkets which dominate retail distribution of fresh produce. Fruit and vegetable market share data for CY2001 is not available at present, but the table below illustrates the supremacy that the retailers held in CY2000. Performance data in other sectors and the track record through the last decade suggest that the retailers are likely to have strengthened their position in the interim.

UK retail sales of fresh fruit and vegetables by outlet type

Outlet	Market Share by Value (percent)	
	CY 1999	CY 2000
Multiple Retailers	78	83
Greengrocers/independents	14	11
Market Stalls	4	3
Other (farm shops/snack bars/box schemes, etc)	4	3

The supermarkets have been at the forefront in introducing new apple varieties and packaging variants to the UK consumer. Through this segmentation of the market, they have been able to expand the market in value terms even though apple consumption is relatively static. Apples are increasingly sold in multi-packs, adding value to the fruit and providing the consumer with consistent quality, flavor and appearance. The buying power of the leading retailers means they are able to source supplies of premium varieties and high grade produce, both of which generate further price premiums.

Tesco claim to be the leading retailer of English apples. A recent press release claimed that the UK's number one retailer annually sells one apple for every person in Britain. The multiple has sold 57 million apples across eight varieties, experiencing growth in market share to 29 percent from 23.2 percent in the year to March 3, 2002. The UK's number two retailer, Sainsbury, estimates its overall apple sales at some US $150 million. The top five varieties in Sainsbury supermarkets are Braeburn, Gala, Cox, Golden Delicious and Granny Smith, accounting for 80 percent of Sainsbury apple sales value. The availability of this information is a relatively recent development, and follows criticism from the apple industry trade association, English Apples and Pears, for the low levels of shelf space given to domestic produce in UK supermarkets.

Apples benefit from their perception as a healthy fruit, although reports of relatively high sugar content in some newer apple varieties did attract negative press publicity earlier this year. Despite the prominent health benefits of consuming fruit, research suggests that young and low income consumers continue to be unresponsive to health messages. Fundamental to plans to increase fruit consumption among both these groups is the UK Government's National Fruit Scheme. This US $150 million initiative aims to provide one free piece of fruit every day to each child in nursery and infant schools by CY2004. Widespread regional trials are continuing prior to national roll out in 2004 and some are being facilitated by the retail sector. For example, Sainsbury are helping to extend the initiative into 100 North of England schools from September 2002. Also at the forefront of government health initiatives is the five a day campaign, which encourages consumers to eat five portions of fruit and vegetables a day as part of their diet. Retailers are also supporting this scheme. For example, Tesco are set to run a promotion focusing on the five a day message which will feature consumer literature on healthy eating and other point of sale material.

Bramley apples have always been promoted as the best variety for cooking, although a shrinking volume of fresh apples are used for meal preparation inside the home. Instead, the cash rich/time poor consumer is switching towards pre-prepared convenience foods, opting for chilled and frozen apple pies, pastries, tarts and other products. Processed Bramley apples represent an estimated 65 percent of total Bramley volumes, reflecting the growing demand from food manufacturers. Other varieties, including some low grade apples for juicing, constitute the remainder of the processing sector. With the general oversupply in the apple market last year, producers growing for processing experienced a tough marketing season. Indeed, processors were sometimes the target of UK dessert apple suppliers, keen to move poor quality apples at low prices. With a smaller crop forecast this year, Bramley apple producers anticipate a more balanced market.

Pears

Mintel estimated the value of the UK retail market for pears at US $225 million in CY2000 and per capita consumption is estimated at 2kg per annum. Supermarkets again dominate consumer sales and have been quick to add value with a variety of pack types. However, there is an argument from the trade that pears are best sold loose and that the fruit benefits from consumers being able to touch and feel it before purchase.

Trade

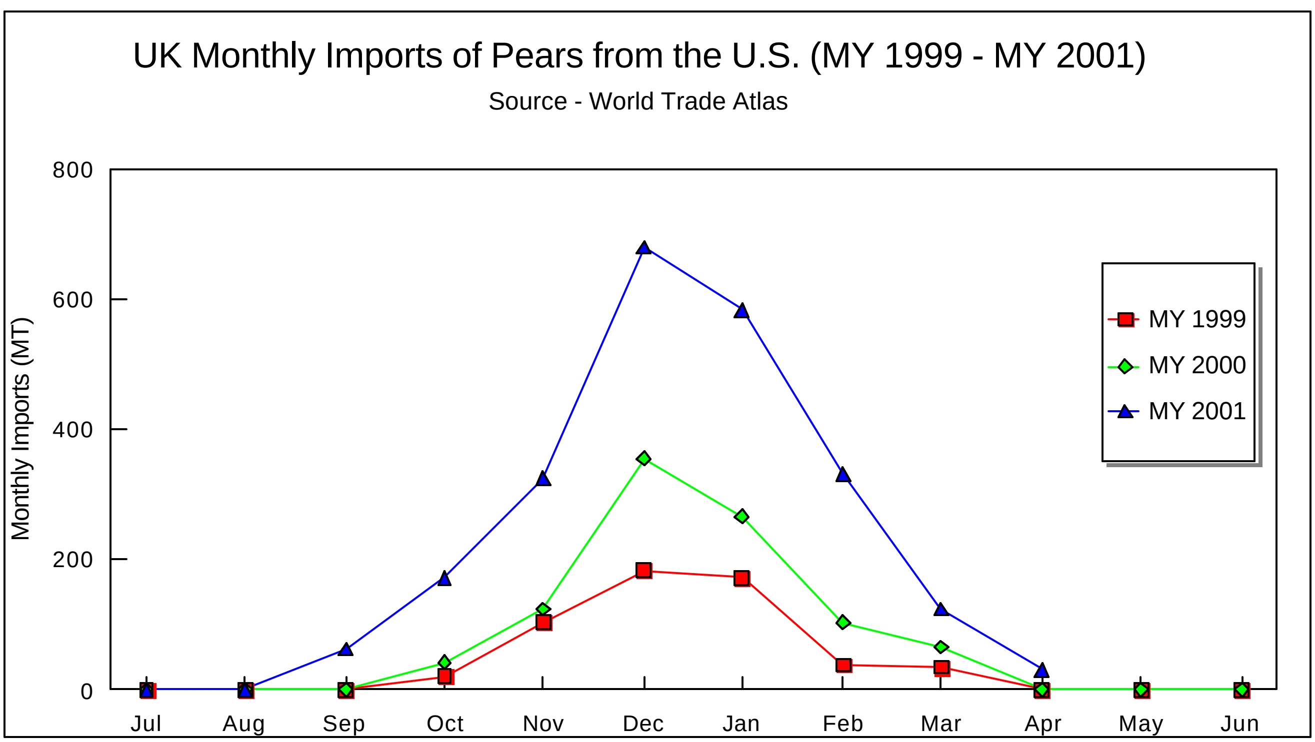
Apples

With a long term downwards trend in domestic production, the UK increasingly looks overseas to meet the consumer demand for apples. Approximately 70 percent of the UK's apple imports are sourced from France, New Zealand and South Africa. Apples begin to arrive from France in significant volumes from mid-August, just as domestic supplies are starting to appear in retail outlets. Shipments of French apples from cold storage continue until March/April. UK retailers then switch to new season crop from southern hemisphere suppliers for the summer months.

The U.S. is traditionally the fourth largest supplier of apples to the UK. With the larger domestic crop in MY2001, imports for the full marketing year are forecast to be 25,000 MT down on MY2000 levels, although final figures depend on the volumes of new season arrivals from the southern hemisphere. The majority of this shortfall is the reduction of shipments from France. It also looks possible that the U.S. will be displaced by Italy as the UK's fourth largest supplier in MY2001, due mainly to 11,000 MT which were shipped in September 2001. This is significantly more than in previous years. Although it has been suggested that this was a one off shipment of low grade apples, perhaps destined for processing, the current Italian apple crop is forecast to show significant gains on 2001. Of particular note for U.S. suppliers is the forecast 31 percent rise in the Red Delicious crop, which may mean continued competition for the U.S. for the position of fourth largest supplier. Chilean apples have also demonstrated a long term increase in shipments to the UK market, with arrivals concentrated from March through May. Although volumes would not be expected to reach the size of shipments from New Zealand and South Africa, the timing of arrivals and considerable promotional support for Chilean top fruit ensures that Chilean apples do compete alongside U.S. apples on retailer shelves.

Pears

The UK is reliant on imports for its pear supplies, typically importing circa 80 percent of fresh consumption. The Netherlands, South Africa and Belgium are traditionally the key suppliers to the UK market. However, imports for MY2001 are forecast to fall significantly on MY2000 imports to 99,100 MT. The majority of this reduction is due to decreased supplies from the Netherlands, following a poor 2001 pear harvest in the Benelux countries. Few countries were able to benefit significantly from this shortfall in EU supplies, but the U.S. was the one exception. Exports of U.S. pears to the UK increased more than threefold in MY2001, albeit from a small base. In addition, the average price per kilogram paid for U.S. pears increased by approximately 15 cents, meaning that the total value of U.S. pear exports to the UK increased from a little over US $0.3 m to just less than US $1.3m. The chart below compares monthly import volumes of U.S. pears in MY2001 with the previous two marketing seasons.


UK Monthly Imports of Pears from the U.S. (MY 1999 - MY 2001)
Source - World Trade Atlas
Monthly Imports (MT)
800
600
400
200
0
Jul
Aug
Sep
Oct
Nov
Dec
Jan
Feb
Mar
Apr
May
Jun
MY 1999
MY 2000
MY 2001

Early estimates for the current EU pear crop indicate a return to normal, with analysts forecasting a 2.23 million MT crop and a recovery for the Netherlands and Belgium. With greater supplies available from the UK's favored source, Post forecasts UK imports to increase in MY2002 to 120,000 MT. It is also likely that the U.S. gains seen in MY2001 will recede, although much depends on the continued success of organic pears in UK markets, which has been a profitable niche for U.S. organic exporters.

Pear exports from the UK are small, but are forecast to increase in MY2001 to 3,800 MT. The main customer for British pears is Ireland. With Benelux supplies likely to recover in the current marketing year, exports are forecast to return to around 3,000 MT in MY2002.

Policy

Tariffs

In line with other EU countries, the UK has its import duty established under the EU Harmonized Tariff Schedule. To calculate import duties for most fruit and vegetables, including apples and pears, the Entry Price System is used. The Tariff indicates a scale of entry prices per 100 Kg net. At the highest point on the scale the Tariff indicates an ad valorem rate of duty only. As you proceed down the scale specific charges are introduced. Thus the lowest entry price generates the highest specific charge in addition to the ad valorem duty.

At the time of writing, apples remain on the Annex 1 list of the EU's products for retaliatory sanctions, following the U.S. tariff measures on imported steel (see Marketing section for more information).

Non-Tariff Barriers

Quality, Safety & Health Regulations

The UK, as a member of the European Union, conforms to the EU Quality Standards on all fresh produce for which standards have been applied. The standards provide a degree of consumer protection for a sector where most products are highly perishable and serious defects in the product can develop extremely rapidly. Also, they help build consumer and trade confidence in the quality of produce they buy. The purpose of the standard is to define the quality requirements for fresh apples and pears after preparation and packaging. Each EU standard prescribes minimum marketing requirements, in terms of quality, size, tolerances, presentation and marking. There are three quality classes: Extra Class, Class I, and Class II. EU/UK Miscellaneous Additives legislation permit the use of Beeswax White, Beeswax Yellow and Shellac, as glazing agents/waxes on apples & pears. In addition to compliance with EU/UK Quality Standards and Food Additives legislation, all fresh deciduous fruit is subject to the EU/UK Pesticides (Maximum Residue Levels in Food) regulations.

Import Requirements

In line with other EU member states, the UK conforms to EC Commission Regulation 2251/92 - Third Country Quality Inspection Services for Fruits and Vegetables. Under the terms of this regulation, all shipments coming from third countries that do not have a certified quality inspection service are subject to inspection at EU ports of entry. Sporadic quality inspections have been in effect in several EU members states, in particular the UK, for some time. Under the terms of the EC Plant Health Directive 77/93, third country apple and pear shipments to the EU must have phytosanitary certification.

Marketing

Domestic supplies are typically sold in the fall because growers have limited storage capacity and the UK varieties are largely unsuited to storage. Depending on the variety, new crop supplies can be available as early as July. The competitive character of the UK market during the fall cannot be understated, with new crop from EU suppliers and southern hemisphere fruit all available simultaneously. Historically, U.S. apples have entered the UK market at this time, although more recently, promotions have been delayed until nearer Christmas to ensure that U.S. fruit is widely available in retailers and is not overwhelmed by the competition. The U.S. is regarded by the trade as a supplier of high quality produce and U.S. apples do command a relatively high price, with UK consumers willing to pay a premium for the red and red bi-color apples.

Selected Prices by Variety - Imports v Domestic Supplies

Country	Variety	Price (pence per KG)				
		1998	1999	2000	2001	2002
UK	Discovery	13	10	24	35	38
France	Golden Delicious	47	50	49	44	51
South Africa	Granny Smith	56	39	88	56	64
USA	Red Delicious	64	43	67	64	76

Source: UK Fresh Produce Journal, prices quoted on 8/15/98, 8/13/99, 9/1/00, 8/24/01 and 8/16/02

The importance of the multiple retailers and their efforts to segment and add value to the top fruit sector was considered in the Consumption section. However, retailers have also been heavily involved in promotional strategies; on-pack competitions, buy-one-get-one-free, sampling and character merchandising are all common sights in the fresh produce section. Particularly prevalent with multipacks of fresh produce is the tactic of price discounting, with retailers offering consumers attractive prices when domestic or imported supples peak in order to maintain sales volumes.

The Washington Apple Commission, the U.S. Apple Export Council and Pear Bureau Northwest all conduct marketing campaigns to coincide with the arrival of U.S. fruit. Market Access Program (MAP) and producer funding allows the U.S. top fruit industry to carry out these activities in the UK market. Consumer and trade activities include tastings, competitions, advertising, point-of-sale material and on-pack promotions.

Many other organizations also carry out marketing initiatives to promote variety and country specific apples in the UK. The following are examples of promotional tactics employed over the last year:

- Apples were among the fresh produce promoted by the Chilean Fresh Fruit Association (CFFA) in a series of cinema advertisements. Almost 500 cinemas ran the advertisements over a 6 week period, and specifically targeted younger consumers. This campaign was followed by a generic promotion of Chilean fresh produce at the UK's leading retail supermarket, Tesco, which was based around point of sale material and Chile-themed competitions. Reports from the trade suggest that Chilean apple sales did not benefit as significantly as other featured fruits from these two generic promotions due to timings of the promotion.

- Capespan UK launched a PR campaign to support the arrival of new season Granny Smith and Golden Delicious from South Africa. Recipes were devised to promote versatility and taste benefits of these firmly established varieties to the food media, and appeared in many specialist and regional publications. Sampling events were also held at London train stations, Wimbledon Tennis Tournament and agricultural shows, as well as special deliveries of produce to national radio stations and supermarket head offices.
- Pink Lady sponsored one of the UK's largest gay and lesbian festivals, which included product giveaway and celebrity endorsement, generating trade and consumer press coverage. More recently, a Tesco promotion featured a Barbie doll offer with pink lady apples and the brand is set to build on its relationship with the Breast Cancer Awareness Campaign.
- English Apples and Pears conduct PR and advertising activity to support the domestic crop, but the most active campaign is for Bramley apples. Bramley Apple Week, the 'Brammy' Awards and Bramley Apple Pie Week feature heavily in the promotional calendar. The awareness weeks generate high profile PR activity in consumer media , with the aim of encouraging consumers to either cook from scratch or purchase some of the pre-prepared products made with Bramley apples. The annual awards ceremony provides recognition to the trade for its role in promoting UK culinary apples.

Several challenges face U.S. apples in the UK marketplace. Unfavorable exchange rates, increasing competition from southern hemisphere suppliers and shifting demand towards new varieties and smaller apples have all been cited by the trade. This competitive environment, together with the increasing dominance of multiple retailers in the fresh produce market, means the quality aspects (firmness, juiciness, flavor) of American apples must be regularly communicated to trade buyers and the price-focused retail trade in the UK. Communication and education of buyers is particularly challenging for traders of U.S. apples when working with the large supermarkets, due to the regular rotation of buying personnel.

More recently, U.S. apples have undergone a period of uncertainty which has affected volumes traded and caused greater concern over the longer term future of U.S. apples in the UK, and indeed, EU markets. The European Commission included apples on a list of U.S. products that faced a 100 percent duty as part of their response to U.S. steel policy. Although the sanctions were originally set for introduction in mid-June, at the time of writing, they have failed to materialize, due largely to U.S. concessions on a variety of European steel products. However, apple shipments from the U.S. were still affected as importers were initially reluctant to book fruit when faced with the prospect of paying a significant duty upon entry to the UK. Shipments tend to be relatively light during the summer months, but trade estimates overall U.S. apple shipments from May had dropped by two thirds. Of greater concern to UK importers were the rumors of supermarket reluctance to agree new season contracts in what appeared to be an uncertain supply situation. However, the fresh produce trade has interpreted U.S. concessions as a move towards reducing the threat of EU sanctions, and this has allowed contracts and marketing plans with the retail trade to progress.

SECTION II - STATISTICAL TABLES

PS&D Tables

Apples

Country	United Kingdom					
Commodity	Fresh Apples				(HA)(1000 TREES)(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Area Planted	11450	11450	10500	9970	0	9350
Area Harvested	11450	11450	10500	9970	0	9350
Bearing Trees	11450	11450	10500	9970	0	9350
Non-Bearing Trees	400	400	400	400	0	400
Total Trees	11850	11850	10900	10370	0	9750
Commercial Production	162200	162200	178500	169140	0	134200
Non-Comm. Production	0	0	0	0	0	0
TOTAL Production	162200	162200	178500	169140	0	134200
TOTAL Imports	455850	455850	460000	429500	0	470000
TOTAL SUPPLY	618050	618050	638500	598640	0	604200
Domestic Fresh Consump	582450	582450	598500	541640	0	559200
Exports, Fresh Only	13400	13400	15000	13000	0	13000
For Processing	22000	22000	25000	44000	0	32000
Withdrawal From Market	200	200	0	0	0	0
TOTAL UTILIZATION	618050	618050	638500	598640	0	604200

Pears

Country	United Kingdom					
Commodity	Fresh Pears				(HA)(1000 TREES)(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Area Planted	2355	2355	2200	2330	0	2200
Area Harvested	2355	2355	2200	2330	0	2200
Bearing Trees	1933	1933	1800	2330	0	2200
Non-Bearing Trees	54	54	0	0	0	0
Total Trees	1987	1987	1800	2330	0	2200
Commercial Production	34031	34031	28500	34970	0	34500
Non-Comm. Production	0	0	0	0	0	0
TOTAL Production	34031	34031	28500	34970	0	34500
TOTAL Imports	119624	119624	125000	99100	0	120000
TOTAL SUPPLY	153655	153655	153500	134070	0	154500
Domestic Fresh Consump	149875	149875	150000	129870	0	151000
Exports, Fresh Only	3280	3280	3000	3800	0	3000
For Processing	400	400	400	400	0	500
Withdrawal From Market	100	100	100	0	0	0
TOTAL UTILIZATION	153655	153655	153500	134070	0	154500