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Report Name: Fresh Deciduous Fruit Annual

Country: Korea - Republic of

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Report Highlights:

Korea's fresh pear production is projected to rise by 10.2 percent to 202,000 metric tons (MT) in marketing year (MY) 2024/25, helped by favorable weather and lower incidences of diseases and pests compared to the previous year. This production level is close to the five-year average, with further yield recovery hampered by weather challenges (heat, tropical nights, etc.) that caused sunburn, cracking, and reduced fruit size. Price inflation remained high for fresh fruit through much of 2024, but has stabilized since the harvest of pears and other domestic fruit. Exports are set to expand by 33 percent, reaching 25,000 metric tons, primarily due to higher production levels. Production in MY 2023/24 has been revised down to 183,300 MT based on official data confirming the full extent of yield losses from adverse weather throughout 2023.

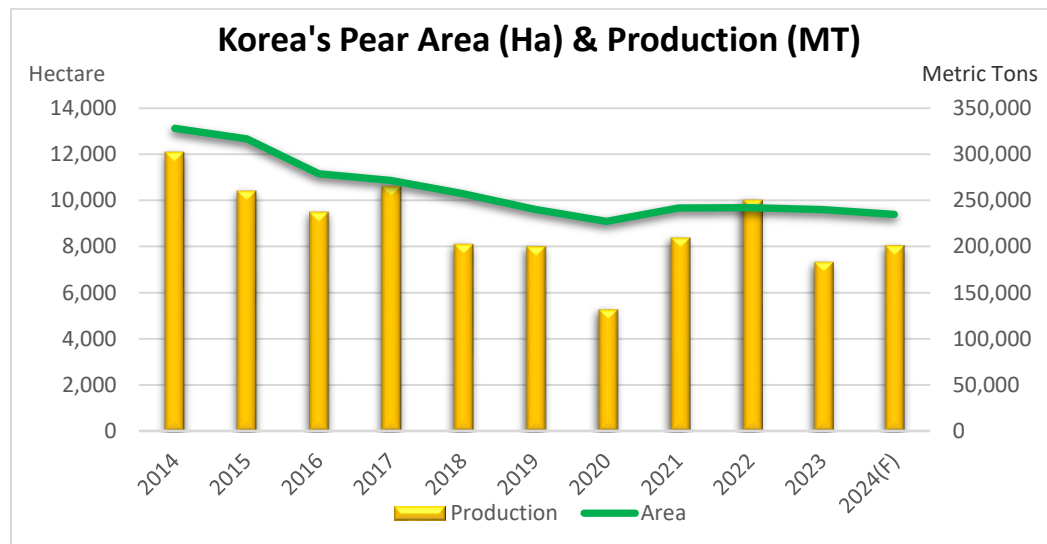
Production

In marketing year (MY) 2024/25 (July – June), Korean fresh pear production is projected to increase by 10.2 percent to 202,000 metric tons (MT), up from 184,000 MT in MY 2023/24. This aligns closely with the five-year average of 198,000 MT. Despite a 2.5 percent decline in fresh pear cultivation area, yields recovered significantly from last year on improved weather conditions during the flowering, growing, and harvest periods, along with lower incidences of fruit disease and pests. Especially as a result of the higher fruit set from favorable weather, yield of fresh pears in MY 2024/25 is projected to increase by 12.7 percent, reaching 2,150 kg per 0.1 hectare (ha), compared to 1,913 kg in MY 2023/24.

In 2024, the growing conditions for Korean sand pears were generally favorable compared to the previous marketing year, when the crop suffered extensive damage from adverse weather conditions such as spring frost during the flowering season in April and typhoons during the harvest season. Although the incidence of pests and diseases decreased compared to the previous year, 2024 saw high temperatures and low rainfall in August and September, which hindered fruit growth, and led to issues such as fruit sunburn and cracking. As a result, overall fresh pear production is expected to barely reach the five-year average production level.

Additionally, the overall fruit size in MY 2024/25 is projected to be smaller, as the prolonged summer heat wave and record number of “tropical nights” limited fruit growth. Tropical nights occur when nighttime temperatures remain above 25 degrees Celsius. In 2024, Korea experienced the highest total number of tropical nights on record, as well as the longest streak of consecutive tropical nights, which lasted into early September.

Figure 1
Korea's Pear Production and Planted Area



Source: Korea Statistical Information Service (KOSIS) & Korea Rural Economic Institute (KREI)

Among Korea's major pear production regions, the central areas (Gyeonggi, Chungcheong, and Sangju) experienced some fruit cracking issues due to high rainfall in September following the summer heat. In the southern production regions (North and South Jeolla provinces), some growers experienced severe sunburn damage from high temperatures during the summer. Due to these setbacks, post's fresh pear production estimate for MY 2024/25 is lower than the production forecast made by local growers' cooperatives in September.

In MY 2023/24, Korea's fresh pear production recorded a sharp decline of 27 percent from the previous year, totaling 184,000 MT compared to 251,000 MT in 2022/23. The primary cause of this significant reduction was damage to flower buds due to low temperatures during the flowering season in April 2023, which led to poor pollination and a lower fruit bearing rate. Consequently, the number of fruits per tree decreased. Additionally, unfavorable weather conditions during the flowering period resulted in a higher incidence of malformed fruits, further reducing the production of marketable pears.

Korea's pear cultivation area has been steadily declining since 2000, though it has remained above 9,000 ha for the last five years. Recently, fluctuations in Korea's pear production have been influenced not only by the reduction in pear cultivation area but also by changes in weather conditions and the occurrence of pests and diseases, which significantly impact yield. Among weather factors, low temperatures during the flowering season and typhoons before harvest had the greatest impact on fresh pear production. These adverse weather events occurred repeatedly every two to three years since 2010, and most recently in 2020 and 2023. To resolve challenges posed by ongoing climate change, the local pear industry is investing in mitigation practices such as the installation of wind machines within orchards and the development of disease-resistant varieties.

In the future, Korea's fresh pear production is expected to gradually decline because of the ongoing reduction in pear cultivation area due to factors such as the aging farming population and urban development around production regions. However, advancements in agricultural technology and development of new pear varieties, which contribute to higher yields, may help mitigate the decline in acreage to some extent. The combination of new pear varieties and improved management practices on mature orchards has increased yields, sustaining overall pear production despite the decline in acreage.

Planted Area

In MY 2024/25, Korea's fresh pear cultivation area is estimated down 2.5 percent to 9,367 ha, from 9,607 ha in MY 2023/24. According to the Korea Rural Economic Institute (KREI), the cultivation area for young pear trees increased by about 7 percent compared to the previous year, driven by the domestic distribution of newly developed pear varieties and new plantings by farms that passed post-inspection periods for fire blight disease. However, the area for mature

pear trees, which accounts for over 90 percent of the total cultivation area, is estimated down by about 3 percent due to fire blight outbreaks, an aging farming population, and urban development.

For the 2023/24 season, the regional distribution of fresh pear cultivation areas was led by Jeolla (North & South) Province, accounting for 37 percent, followed by Chungcheong (North and South) at 26 percent, Gyeongsang (North & South) at 20 percent, and Gangwon/Gyeonggi at 18 percent.

Table 1
Korea’s Pear Planted Area by Province (Unit: Hectare)

Korea’s Pear Planted Area by Province (Unit: Hectare)				
Province	MY 2022/23	MY 2023/24	MY 2024/25	Change (%)
	Cultivated Area (ha)	Cultivated Area (ha)	Cultivated Area (ha)	
Gyeonggi	1,530	1,488	1,458	-2.0
North Chungcheong	232	187	171	-8.6
South Chungcheong	1,991	2,127	2,134	0.3
North Gyeongsang	1,005	986	970	-1.6
South Gyeongsang	492	475	475	0
South Jeolla	2,729	2,710	2,686	-0.9
North Jeolla	819	788	717	-9.0
Other Provinces	884	846	756	-10.6
Total	9,680	9,607	9,367	-2.5

Source: Korea Statistics

In MY 2023/24, the cultivation area of fresh sand pears in Korea was dominated by the “Shingo” variety, accounting for 85 percent of the total cultivated area. The “Wonhwang” variety covers 4 percent, and other varieties make up 11 percent. The cultivation share of the “Shingo” variety declined by about 2 percent compared to the 2015/16 season. Due to the government’s initiative to promote domestically developed varieties, there has been a gradual increase in farms transitioning from “Shingo” to other new varieties such as “Shinhwa”, “Changjo”, and “Hwasan”. However, significant changes in the cultivation area are not expected. This is because many pear growers, who are aging, are reluctant to adopt new varieties, and the “Shingo” variety remains favored due to its excellent storage characteristics, especially given that pears are still primarily consumed during two main Korean traditional holidays.

Since 2000, Korea's total pear cultivation area has been trending steadily downward due to declining farm income, aging farmers, and urbanization near pear production regions. From 2000 to 2020, the cultivation area decreased by an average of five percent annually, and since 2020, it has stabilized at around 9,000 ha. Recently, the distribution of domestically developed pear varieties has offset the loss of mature trees. Despite this, the rapid expansion of new varieties poses some challenges. For one, the traditional “Shingo” pear variety is known for its excellent

taste and storability, even though it is very labor-intensive to grow. Moreover, since sand pears are largely perceived as a special gift fruit rather than an everyday consumption fruit, new varieties may be slowed by limited market potential for pears compared to other fruits.

Table 2
Korea's Pear Planted Area by Cultivars

Korea's Pear Planted Area by Cultivars (Unit: Hectare)				
Calendar Year	Singo	Wonhwang	Other	Total
2015	10,544	732	1,388	12,664
2016	9,429	646	1,269	11,164
2017	9,426	525	949	10,861
2018	8,902	484	917	10,303
2019	8,250	461	904	9,615
2020	7,733	436	922	9,091
2021	8,282	445	948	9,675
2021	8,282	445	948	9,675
2022	8,258	438	984	9,680
2023	8,195	432	980	9,607

Source: Statistics Korea

Consumption

In MY 2024/25, fresh pear consumption in Korea is expected to increase by approximately 7.6 percent from the previous year, reaching 177,000 MT. This anticipated increase is attributed to a projected production increase of 10.2 percent and more affordable prices compared to last year. Despite this, domestic pear consumption has been steadily declining among fruit categories, primarily due to a lack of convenience in daily consumption compared to other fruits and limited variety in available cultivars. The Korean pears are typically marketed as larger fruits, which are consumed less frequently on a daily basis, leading to a decrease in consumer preference relative to other easily consumable fruits. However, during the Chuseok and Lunar New Year holiday periods, fresh pears continue to be in high demand as gifts. These two occasions will remain key consumption periods for fresh pears in the coming years.

In MY 2023/24, the domestic market for fresh pears in Korea saw a significant decrease of approximately 27 percent in production volume, coinciding with a decline in the supply of other major fruits including apples, peaches and persimmons. As a result, the average annual retail and wholesale prices recorded significant increases of 23 percent and 78 percent, respectively, compared to the previous year. Notably, due to the significant shortage of domestic fruit production leading to price surges, most stored pears were released into the market early in the first quarter of 2024 (for the Lunar New Year holiday) at high prices that continued to rise until the 2024 harvest season.

Specifically, in the second quarter from April to June 2024, retail and wholesale prices rose by approximately 93 percent and 193 percent, respectively, compared to the same period the previous year. In July and August 2024, with most supplies of MY 2023/24 stored pears depleted, the average retail price remained above 70,000 Korean won (KRW) for 10 high-quality pears and over 50,000 KRW for 10 medium-quality pears, more than double the same time in 2023 (see Table 11). When the Chuseok holiday arrived in mid-September 2024, some quantities of early MY 2024/25 became available and prices finally moderated to just above 2023 levels.

Table 3
Korea's Average Annual Market Prices for Fresh Pears

Average Annual Market Prices (Consumer & Wholesale) for Fresh Pears (Unit: KRW, Percent)				
Marketing Year (July – June)	Average Annual Consumer Price (KRW/10 fruits)	Change (%) from previous year	Average Annual Wholesale Price (KRW/15 kg)	Change (%) from previous year
MY 2017/18	29,889	-	40,848	-
MY 2018/19	35,539	19	46,714	14
MY 2019/20	34,695	-2.4	49,341	5.6
MY 2020/21	41,331	19.1	71,419	44.7
MY 2021/22	38,964	-5.7	62,101	-13
MY 2022/23	30,500	-21.7	48,309	-22.2
MY 2023/24	37,636	23.4	85,756	77.5

Source: Korea Agro-Fisheries & Food Trade Corporation (aT)

Trade

Exports

In MY 2024/25, Korea's fresh pear exports are projected to reach 25,000 MT, representing a 33 percent increase from the previous year's exports of 19,000 MT, primarily driven by increased domestic production. Fresh pear exports are anticipated to constitute approximately 12-13 percent of the total domestic pear production. The three principal export markets for Korean fresh pears are the United States, Taiwan, and Vietnam, with these countries collectively accounting for nearly 90 percent of the total fresh pear exports.

The U.S. market remains the largest export market for Korean fresh pears, representing 48 percent of total exports in MY 2023/24. In this period, a total of 9,077 MT of fresh pears were exported to the United States, reflecting a 19 percent decrease from the previous year's exports of 11,161 MT, primarily due to a decline in overall fresh pear production. Taiwan ranked as the second-largest export destination, accounting for 30 percent of total Korean fresh pear exports in MY 2023/24, with exports totaling 5,578 MT. This figure marks a significant 50 percent decline

from the previous year (11,082 MT). Additionally, Vietnam covered 11 percent of total exports, with 2,083 MT shipped during the same period, down 54 percent from the prior year (4,514 MT).

In recent years, Korea's fresh pear exports have fluctuated in response to changes in domestic pear production but have shown a gradual increase since 2000. In 2020, Korea's pear exports decreased significantly year-on-year due to lower production and the COVID-19 pandemic. Nonetheless, the increased production during MY 2022/23, which reached 251,000 MT, resulted in a notable rise in exports, totaling 29,500 MT.

Korea's fresh pear exports are conducted through only 13 integrated export complexes located nationwide in main production regions. According to the Korean pear industry, growers' cooperatives collectively set a goal of 34,000 MT of annual fresh pear exports by 2033.

Currently, an average of 10,000 MT of Korean fresh pears are exported to the United States annually. Starting in March 2025, the Korean pear export industry will introduce an additional option for the quarantine inspection process, allowing for inspection by domestic inspectors from the Animal, Plant Quarantine Agency (APQA) of MAFRA alongside the current preclearance inspection system by USDA's Animal and Plant Health Inspection Service (APHIS). However, it is expected that the Korean pear industry will still prefer the existing quarantine system due to concerns about potential difficulties or additional costs arising during customs clearance in the United States.

Imports

Korea does not allow imports of fresh pears due to phytosanitary concerns.

TABLES

Table 4
Production, Supply, and Distribution of Fresh Pears

Pears, Fresh Market Year Begins Korea, Republic of	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	9680	9680	9607	9607	0	9367
Area Harvested (HA)	0	0	0	0	0	0
Bearing Trees (1000 TREES)	0	0	0	0	0	0
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total Trees (1000 TREES)	0	0	0	0	0	0
Commercial Production (MT)	251093	251093	200100	183300	0	202000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	251093	251093	200100	183300	0	202000
Imports (MT)	0	0	0	0	0	0
Total Supply (MT)	251093	251093	200100	183300	0	202000
Domestic Consumption (MT)	221593	221632	180100	164515	0	177000
Exports (MT)	29500	29461	20000	18785	0	25000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	251093	251093	200100	183300	0	202000
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production and Consumption

Table 5
Korea's Pear Production Situation 1/

Year	Area (Ha)	Production (MT)	Yield (Kg/0.1 Hectare)
2016	11,164	238,014	2,132
2017	10,861	265,757	2,447
2018	10,303	203,166	1,972
2019	9,615	200,732	2,088
2020	9,091	132,580	1,458
2021	9,675	210,293	2,174
2022	9,680	251,093	2,594
2023	9,607	183,802	1,913
2024 2/	9,367	202,000	2,157

1/ Calendar year basis

2/ Preliminary forecast by Korea Rural Economic Institute (KREI)

Source: Korea Statistical Information Service (KOSIS)

Table 6**Korea's Pear Utilization (Unit: MT) 1/**

Year	Total	Fresh	Export	Processing
2018	203,166	166,141	32,925	4,100
2019	200,732	164,522	30,710	5,500
2020	132,580	100,624	23,556	8,400
2021	210,293	181,152	21,841	9,500
2022	251,093	214,919	26,274	9,900
2023 2/	183,802	N/A	24,430	N/A

1/ Calendar year basis

2/ Preliminary forecast by KREI & FAS Seoul

Source: Ministry of Agriculture, Food and Rural Affairs (MAFRA)

Table 7**Korea's Pear Production as Ratio to Total Fruit Production**

Year	Total Fruits (1,000 MT)	Pear (1,000 MT)	Ratio (%)
2016	2,387	239	10.0
2017	2,358	266	11.3
2018	2,160	203	9.4
2019	2,206	201	9.1
2020	1,976	133	6.7
2021	2,109	210	10.0
2022	2,206	251	11.4
2023	N/A	184	N/A

Source: Korea Statistical Information Service (KOSIS)

Table 8**Korea's Per Capita Fruits Consumption (Unit: Kg)**

Korea: Per Capita Fruit Consumption (Unit: Kg)								
Year	Total Fruits	Apple	Pear	Peach	Grape	Persimmon	Citrus	Others
2018	57.5	9.2	3.3	4.0	4.5	1.9	12.0	22.6
2019	56.6	10.3	3.3	4.1	4.5	1.8	12.1	20.6
2020	51.5	8.1	2.1	3.6	4.3	1.6	12.6	19.1
2021	54.4	9.9	3.6	3.8	4.5	1.3	11.8	19.5
2022	55.0	11.0	4.4	3.7	4.4	1.9	11.8	17.8
2023 1/	N/A	7.6	3.1	3.1	4.2	1.3	11.8	N/A

Source: Ministry of Agriculture, Food and Rural Affairs (MAFRA)

1/ Preliminary forecast by KREI & FAS Seoul

Trade

Table 9

Monthly Korean Pears Exports (Unit: MT)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018	5,110	2,029	2,533	1,411	543	118	17	2,991	2,719	5,532	5,673	4,250
2019	3,119	878	1,062	485	276	27	2	4,658	3,251	5,720	5,873	5,359
2020	2,626	1,525	1,231	567	195	12	28	1,230	4,359	4,393	4,486	2,904
2021	1,109	333	236	35	10	6	3	2,746	3,091	4,946	5,095	4,231
2022	1,787	635	913	352	103	61	21	4,119	2,890	4,786	5,087	5,439
2023	1,450	2,206	2,212	662	397	193	77	2,805	2,988	3,581	4,762	3,110
2024	1,078	293	99	3	1	0	0	3,453	-	-	-	-

Source: Korea Customs Service & Korea International Trade Association

Table 10

Export Matrix for Korean Pears (Sand Pears)

Export Trade Matrix						
Country: Korea						
Commodity: Commodity: Fresh Pears (HS 0808.30) Unit: MT & US\$1,000						
Exports to	MY 2021/22 (July 2021 – June 2022)		MY 2022/23 (July 2022 – June 2023)		MY 2023/24 (July 2023 – June 2024)	
Country	Volume	Value	Volume	Value	Volume	Value
U.S.	9,076	33,666	11,161	38,472	9,077	32,330
Taiwan	9,798	28,474	11,082	24,277	5,578	16,358
Hong Kong	564	1,843	641	1,692	405	1,278
Vietnam	2,905	7,639	4,514	9,240	2,083	5,749
Canada	344	1,321	508	1,773	604	2,151
All Others	1,359	4,230	1,555	4,667	1,038	3,722
Grand Total	24,046	77,173	29,461	80,121	18,785	61,588

Source: Korea Customs Service & Korea International Trade Association

Prices

Table 11

Average Retail Prices for Korean “Shingo” Pear (Sand pear), Nationwide
(Unit: Korean Won per 10 Fruits)

Month	High Quality		Medium Quality	
	CY 2023	CY 2024	CY 2023	CY 2024
Jan.	28,361	33,115	22,714	25,558
Feb.	30,206	37,275	22,594	29,392
Mar.	27,847	41,816	21,441	32,402
Apr.	27,265	44,804	22,722	34,679
May	28,007	52,761	22,374	37,902
Jun.	27,935	63,301	21,098	48,536
Jul.	28,531	79,559	19,903	54,462
Aug.	30,824	74,550	20,257	51,568
Sep.	31,569	32,367	23,381	26,059
Oct.	30,975	-	24,405	-
Nov.	27,388	-	21,996	-
Dec.	29,273	-	26,228	-

Source: Korea Agro-Fisheries & Food Trade Corporation (aT)

Table 12

Average Wholesale Prices for Korean “Shingo” Pear (Sand pear), Nationwide
(Unit: Korean Won per Kilogram)

Month	High Quality		Medium Quality	
	CY 2023	CY 2024	CY 2023	CY 2024
Jan.	2,981	5,048	2,636	4,621
Feb.	2,999	5,592	2,679	5,000
Mar.	2,902	6,921	2,583	6,136
Apr.	2,815	8,215	2,509	7,268
May	3,023	8,963	2,709	8,096
Jun.	3,342	9,674	2,969	8,548
Jul.	3,804	10,906	3,330	9,025
Aug.	3,654	3,537	3,172	3,239
Sep.	4,137	4,142	3,712	3,505
Oct.	3,818	-	3,282	-
Nov.	4,228	-	3,771	-
Dec.	4,551	-	4,131	-

Source: Korea Agro-Fisheries & Food Trade Corporation (aT)

Table 13
Monthly Average Foreign Exchange Rate
 (Unit: Korean Won / 1US\$)

Month	2022	2023	2024
Jan.	1194.01	1247.25	1323.57
Feb.	1198.34	1270.74	1331.74
Mar.	1221.03	1305.73	1330.70
Apr.	1232.34	1320.01	1367.83
May	1269.88	1328.21	1365.39
Jun.	1277.35	1296.71	1380.13
Jul.	1307.40	1286.30	1383.38
Aug.	1318.44	1318.47	1354.15
Sep.	1391.59	1329.47	1334.82
Oct.	1426.66	1350.69	-
Nov.	1364.66	1310.39	-
Dec.	1296.22	1303.98	-

Source: Industrial Bank of Korea

Attachments:

No Attachments