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Report Name: Fresh Deciduous Fruit Annual

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Post: Ottawa

Report Category: Fresh Deciduous Fruit

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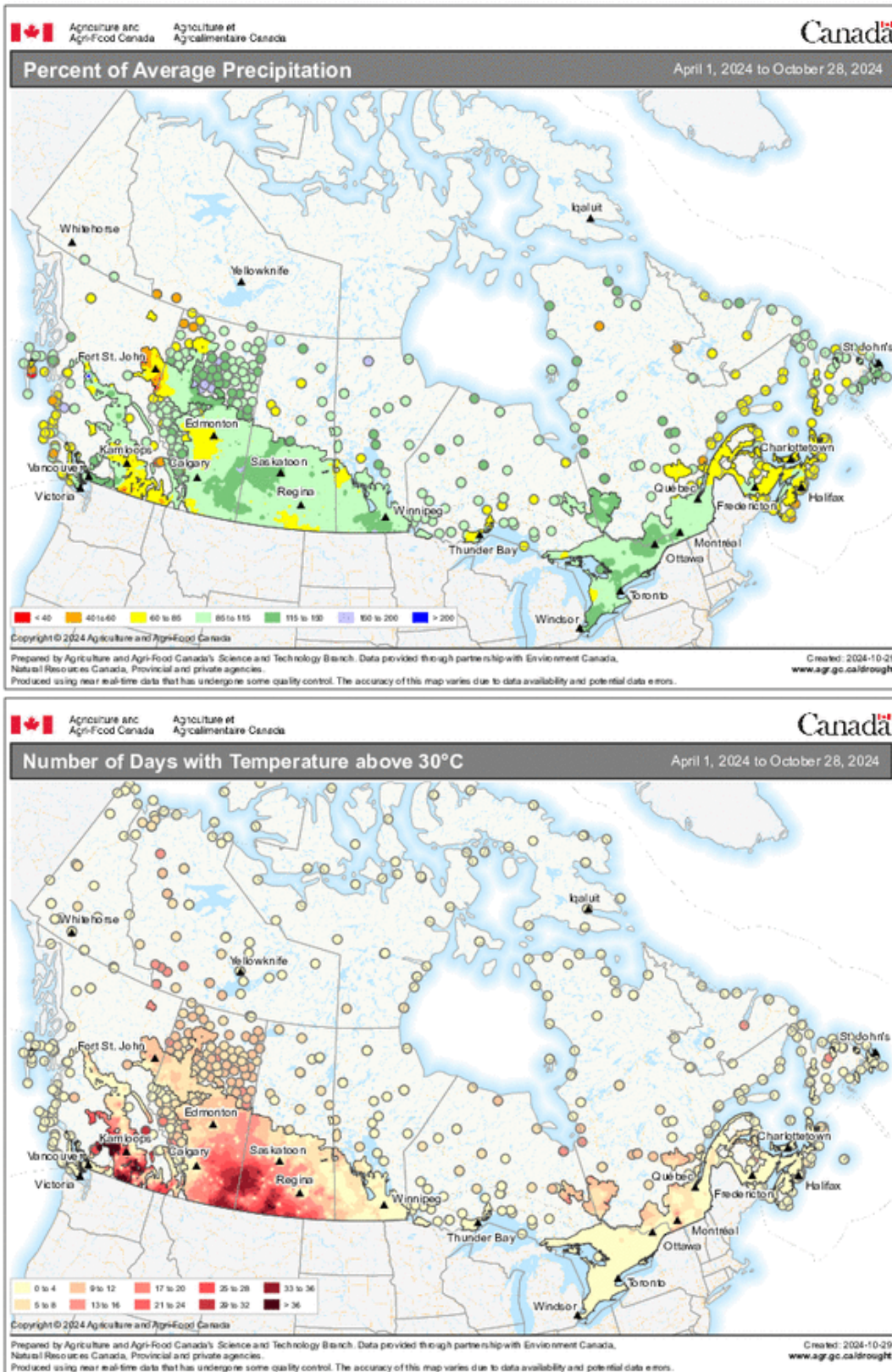
Report Highlights:

Canadian apple production is forecast to see a five percent growth in MY 2024/25, driven by a larger Quebec crop and average Ontario crop. Pear production is forecast to be down nine percent on 2023 numbers as a result of cold impacts to the crop in British Columbia. A larger Ontario crop will only partially offset losses in British Columbia. Production of table grapes is forecast to decline sixteen percent due to adverse weather events impacting Ontario and British Columbia. Imports of apples and pears are forecast to be down slightly in MY 2024/25 driven by shifting consumer preferences and a reduction in U.S. production. Exports of apples are forecast up eight percent on the larger forecasted crop. Imports of table grapes are forecast two percent higher.

Executive Summary:

- FAS/Ottawa forecasts a five percent growth in Canadian apple production in MY 2024/25. The Quebec apple crop is projected to be up significantly, following frost events which negatively impacted production in the previous market year. Timely rains and limited hail damage will see the crop above the five-year average. Ontario crop is anticipated to be average production-wise but with good size and color; rain was timely in some growing regions but overly abundant in others. The apple crop in British Columbia is expected to be average with apple trees having weathered a January 2024 cold event better than pears and grapes.
- Fresh apple imports are forecast to drop a little over two percent as a result of the increase in domestic production and a decline in the U.S. apple crop. Canada is forecast to maintain recent year's export pace with a larger crop supporting a forecast of eight percent growth in exports. A smaller U.S. crop will also provide additional export opportunity for Canadian apples.
- Pear production for MY 2024/25 is forecast down nine percent. The January 2024 extreme cold event in British Columbia is projected to have had a significant impact on production with estimates that the crop could be down as much as 30 percent. Conversely, Ontario, the second largest pear producing province in Canada, benefitted from good growing conditions in 2024. While the Ontario crop will be up significantly, FAS/Ottawa maintains an overall reduction in the Canadian pear crop owing to the losses in British Columbia.
- Imports of fresh pears are forecast to be down slightly on a smaller U.S. crop and declining domestic consumption.
- FAS/Ottawa forecasts a sixteen percent reduction in Canada's table grape crop for MY 2024/25 as a result of extreme cold and frost impacts in British Columbia and Ontario.
- Imports of fresh table grapes are forecast to grow two percent, recovery of the California table grape crop in MY 2024/25 should see more exports to Canada.

Figure 1. Precipitation and temperature maps for 2024 growing season Canada.



Source: Agriculture and Agri-Food Canada

APPLES

Table 1. Production, Supply, and Distribution of fresh apples.

NOTE: "NEW FAS/Ottawa" data reflect FAS/Ottawa's assessments and are NOT official USDA data

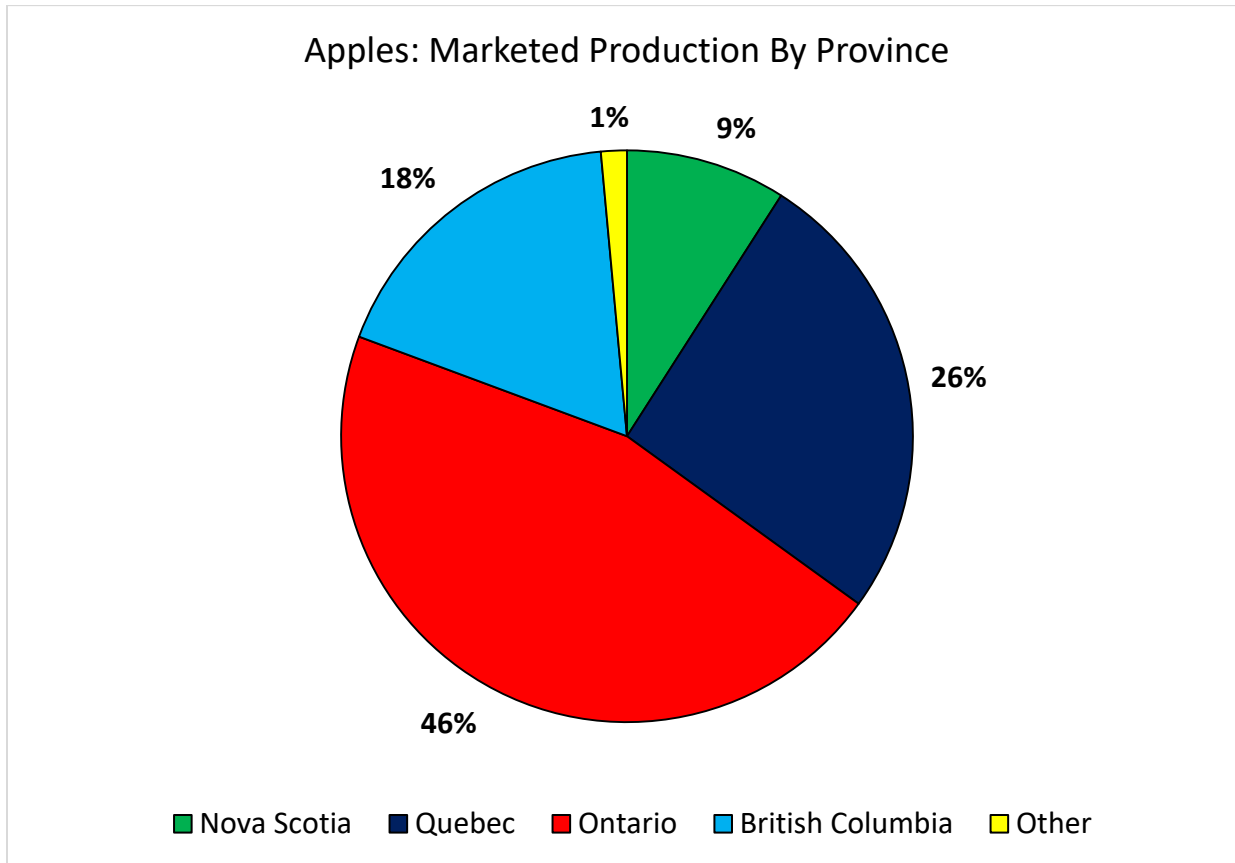
APPLES Fresh Canada	2022/2023		2023/2024		2024/2025*	
	<i>Marketing Year: July-June</i>					
	USDA Official	NEW FAS/Ottawa Data	USDA Official	NEW FAS/Ottawa Data	USDA Official	NEW FAS/Ottawa Estimates
Production	376,023	377,814	365,000	363,592	0	382,000
Imports	184,900	184,894	170,000	163,872	0	160,000
Total Supply	560,923	562,708	535,000	527,464	0	542,000
Domestic Consumption	498,523	500,303	480,000	470,132	0	480,000
Exports	62,400	62,405	55,000	57,332	0	62,000
Total Distribution	560,923	562,708	535,000	527,464	0	542,000

*Data in hectares or metric tons / *FAS/Ottawa forecast*

Production:

FAS/Ottawa forecasts a five percent growth in Canadian apple production in MY 2024/25. Early crop estimates projected a 6.5 percent production increase for Canada with Ontario, Quebec and British Columbia production anticipated to be larger than MY 2023/24, while in the Maritimes, Nova Scotia was projected to see a decline and New Brunswick production to remain flat. Ontario, Quebec, and British Columbia are the main apple growing provinces in Canada and typically account for around 90 percent of Canadian production.

Figure 2. Canadian marketed apple production by province for 2023.



Source: Statistics Canada

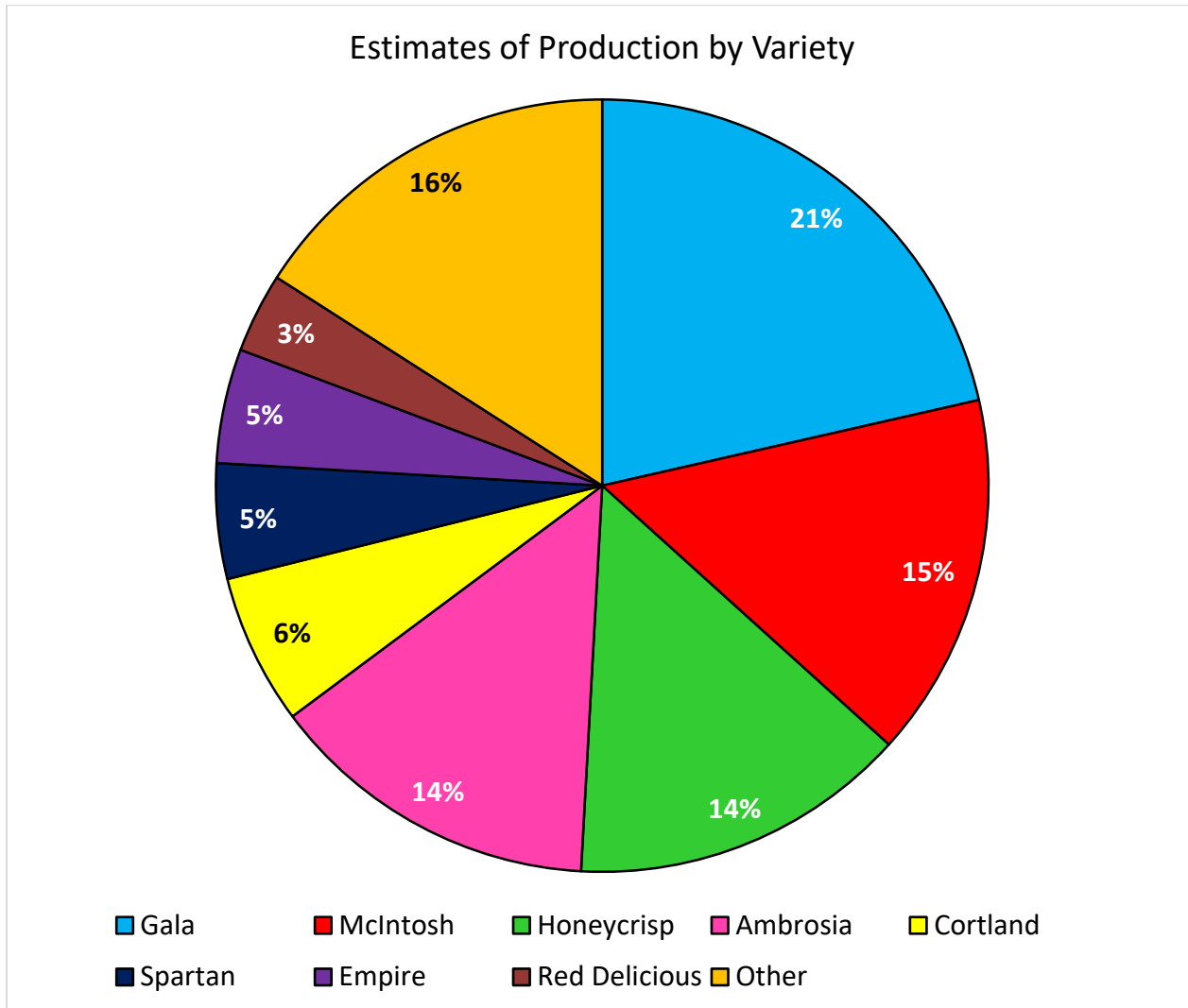
Ontario accounts for close to half of Canadian apple production and over one-third of total Canadian apple acreage. High density plantings provide for higher yields per acre. Significant rains in many Ontario growing regions have reported translated into a good crop on size and color. However, final harvest may be down slightly on MY 2023/24 as a result of excess moisture in some areas. Frost and hail were not reported as having a significant impact on the overall Ontario crop, although there was regional variation. Apples should store well. The large Washington apple crop from MY 2023/24 continues to have implications. Prices have been suppressed and anticipated to remain lower into at least January. July storage reports showed large volumes remained in storage in Ontario, almost 90 percent above July 2023 storage data. Funding announced in 2023 under a federal-provincial partnership is supporting conversion of some acres to more sustainable varieties as well as shifting acreage to meet changing consumer preferences.

The Quebec apple crop is projected to be up significantly in MY 2024/25, following frost events which negatively impacted production in the previous market year. Timely rains and limited hail damage will see the crop well above the five-year average and anticipated as the largest apple crop in the past 15 years. Quebec producers continue to look for opportunities to modernize their acreage and increase plantings of consumer preferred varieties such as Ambrosia, Honeycrisp, and Gala. Quebec has the

largest McIntosh acreage in Canada, a variety which is no longer popular with consumers for fresh consumption. Given the size of the crop, storage may be an issue. More apples are likely to move into processing as a result as well as move out of province. Ontario crop is anticipated to be average production-wise but with good size and colour; rain was timely in some growing regions but overly abundant in others. The apple crop in British Columbia is expected to be average with apple trees having weathered a January 2024 cold event better than pears and grapes.

Early estimates suggested that British Columbia production would be up on MY 2023/24 but volume is currently projected to remain average. There is likely still a lingering impact from the 2021 heat dome as well as other adverse weather events in recent years that continue to weigh on tree productivity. While growing regions in British Columbia experienced an extreme cold event in 2024 that decimated the tender fruit and grape crops, apple orchards fared better. However, while the crop will be average volume-wise, there are sizing and quality issues. Additionally, one of the packers and owners of controlled atmosphere in the province, the BC Tree Fruits Cooperative announced an immediate closure in July. This closure left many growers without a packer for the upcoming harvest and with a loss of access to controlled atmosphere storage. Reportedly, growers will be able to secure packing line access at other operations but access to controlled atmosphere storage will be an issue. Some growers may look to secure storage access in Washington state, a smaller Washington crop may help support access to these storage facilities. As a result of limited controlled atmosphere storage options at present, it is likely that there will be a large volume of apples selling through the end of 2024 as growers lack the capacity to put them in longer-term storage. This would in turn create a greater need for imports to satisfy B.C. retailer and consumer demand from January 2025 onwards. A higher volume on the market through end of 2024 will also continue to negatively impact pricing.

Figure 3. Estimates of Canadian apple production by variety for 2023.



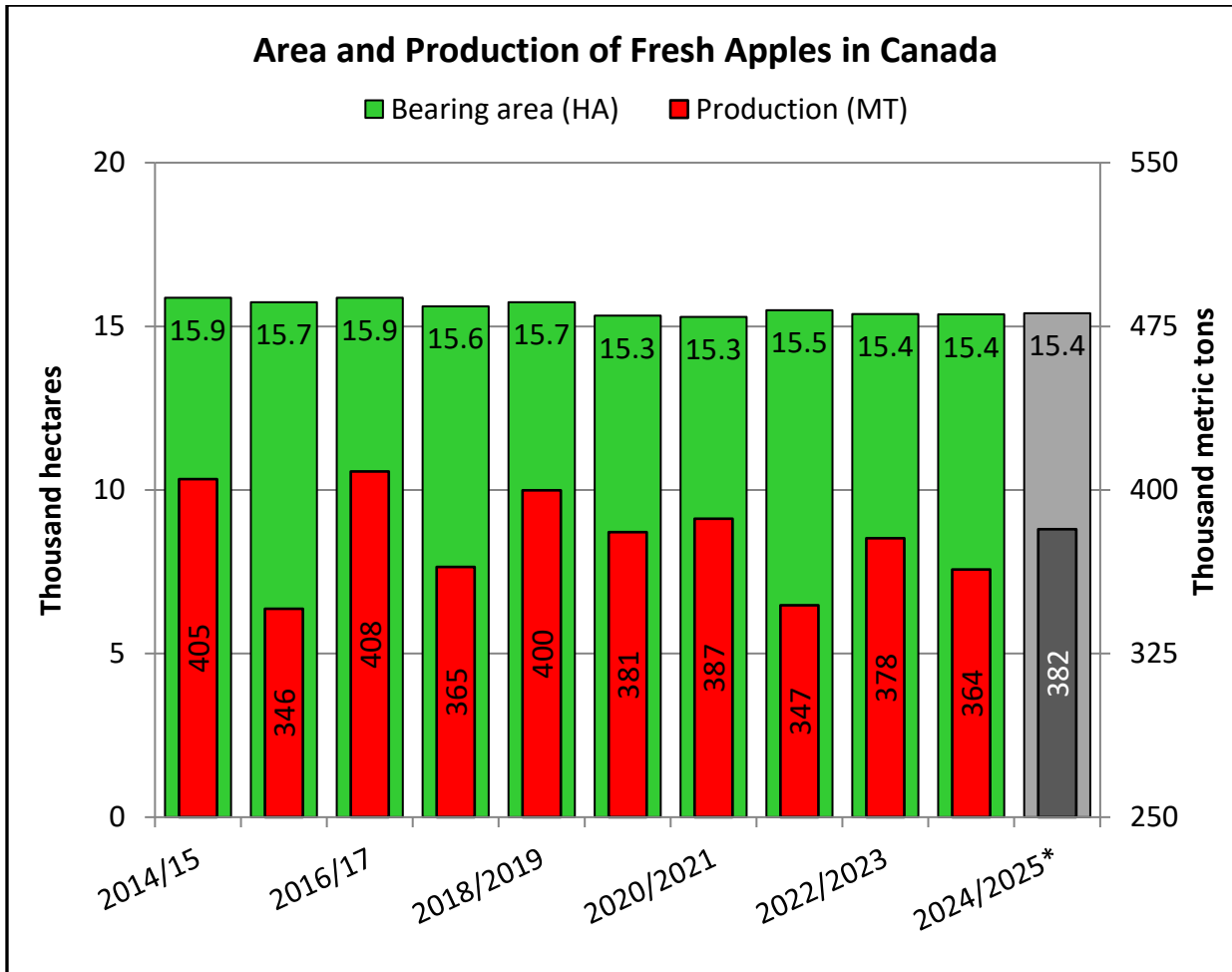
Source: *Early Crop Estimates Survey, Canada/Fruit and Vegetable Growers of Canada*

FAS/Ottawa forecasts acreage to remain stable for MY 2024/25. Given the challenges of apple production in British Columbia, acreage in that province will likely continue to decline in coming years but is projected to remain flat for MY 2024/25. Given the damage to other commodities caused by weather events in recent years, the fruit industry is evaluating future production in the province. A high cost of land and rising costs of production coupled with poor pricing continue to strain the apple industry. Changes in acreage in other parts of the country are anticipated to be largely net neutral for MY 2024/25, with older orchards being replanted and more Ambrosia, Gala, and Honeycrisp acreage replacing McIntosh.

Labor availability continues to be a challenge for industry and Canadian consumers continue to raise concerns over a rising cost of living, including inflation in food outpacing general inflation. Retailers and growers are facing pressure to keep costs low for consumers but amidst higher growing costs,

growers will either need to find ways to improve efficiencies or potentially face lower earnings against these cost of production increases.

Figure 4. Area (hectares) and production (metric tons) of fresh apples in Canada.



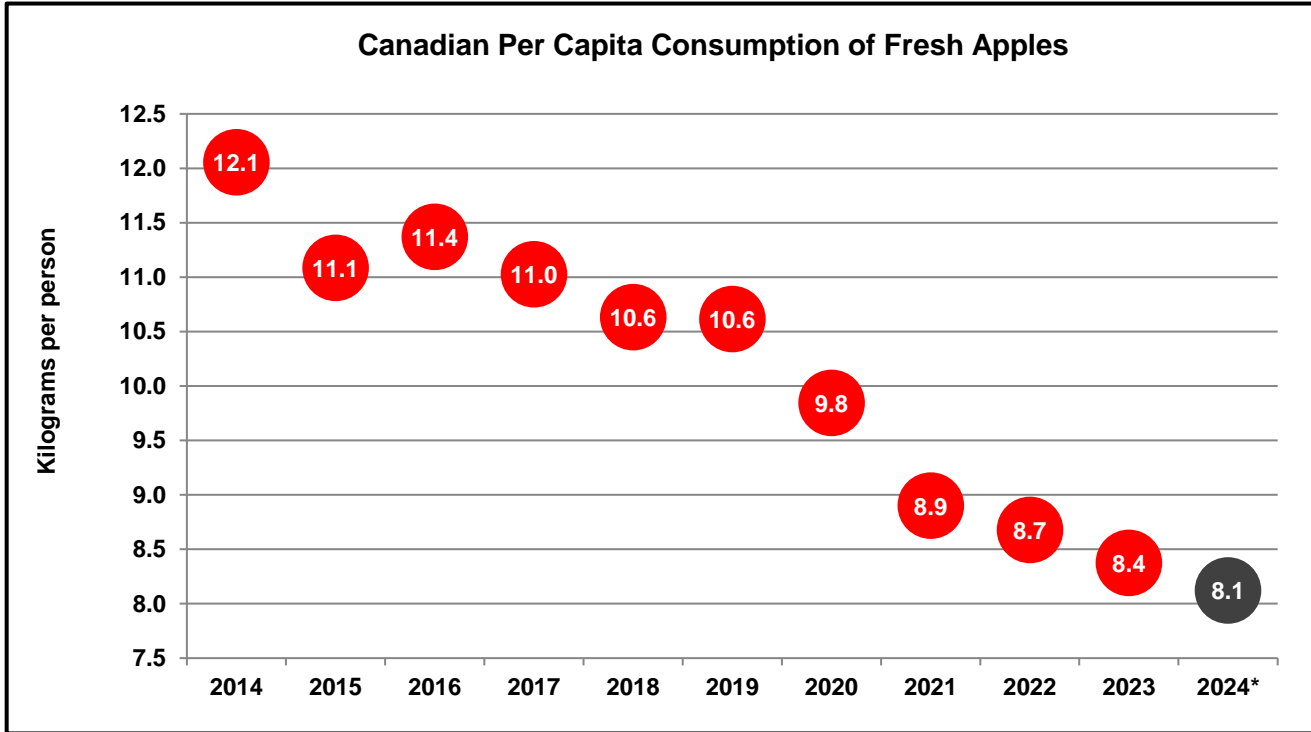
Source: Statistics Canada / *FAS/Ottawa forecast

Consumption:

FAS/Ottawa forecasts a two percent growth in domestic consumption for MY 2024/25 but this will still translate to a per capita consumption decline given Canada’s immigration-driven population growth the past few years. Canadian per capita consumption of apples has sustained a long-term declining trend and has dropped off precipitously in the last four years. Consumers have an increasing number of options when it comes to fresh produce at retail. Within the fresh fruit displays at retail, there has been significant competition from berries and tropical fruits for consumer dollars. While Canada has promoted increasing fresh produce consumption as the health-conscious choice, consumers have been scaling back consumption amidst rising costs. Apples could provide consumers with a relatively cost effect and easier storing fruit choice with a lower potential for food waste due to a longer shelf life than

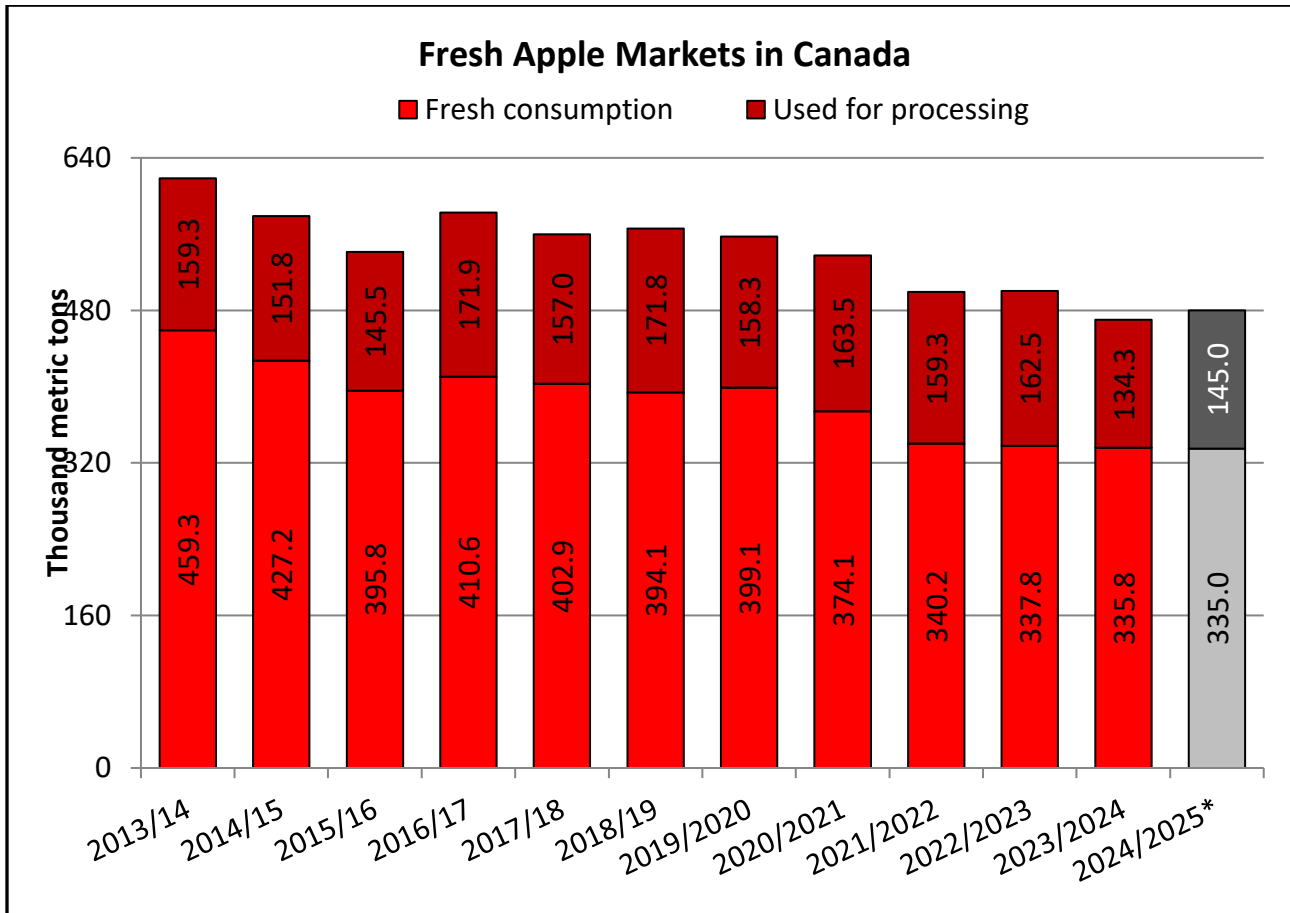
some competing fruits, however, consumer engagement will need to improve to raise per capita consumption.

Figure 5. Evolution of Canadian per capita consumption of fresh apples.



Source: Statistics Canada / *FAS/Ottawa forecast

Figure 6. Volume of fresh apples destined for fresh consumption and for further processing in Canada.



Source: Statistics Canada / *FAS/Ottawa forecast

Trade:

Growth in the domestic crop and a continuation in lower consumption rates amongst Canadians is expected to negatively impact import volumes in MY 2024/25. FAS/Ottawa forecasts a two percent decline in imports. A smaller U.S. apple crop will also weigh on Canadian imports. While the United States will remain the dominant supplier of fresh apples to Canada, FAS/Ottawa forecasts that both processing and fresh apple imports will be down in MY 2024/25. Canada continues to have limited processing capacity and Quebec’s larger crop will take more processing share than previous year’s leaving less volume to be filled by imports. Imports of U.S. apples are competitive against Canadian apples in the fresh market but a smaller available volume in the United States and a continued decline in per capita consumption in Canada will moderate import needs despite a slight growth in overall domestic consumption.

Table 2. Imports of fresh apples into Canada by volume.

Canada: Imports of fresh apples						
<i>Marketing year: July-June / Quantity in metric tons</i>						
	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
World	203,207	204,893	190,354	205,865	184,894	163,872
for processing	69,182	68,689	66,450	73,890	58,796	37,756
organic	11,456	14,297	14,513	12,977	10,697	9,594
other	122,569	121,909	109,390	118,997	115,398	116,521
United States	155,019	171,092	157,376	171,998	149,967	140,183
for processing	64,277	65,661	64,648	72,465	57,458	36,656
organic	9,411	12,938	12,730	11,150	9,739	9,057
other	81,331	92,495	79,997	88,383	82,768	94,470
Chile	23,590	15,359	14,469	15,870	12,715	6,993
European Union	11,171	3,865	4,881	2,521	3,722	677
Italy	9,612	3,577	4,643	1,702	3,451	471
New Zealand	8,164	8,464	5,553	7,734	9,501	8,696
China	2,683	2,458	2,839	1,683	1,901	2,397
All other countries	4,139	3,943	5,474	6,878	7,359	5,132
Import Market Shares						
United States	76.3%	83.5%	82.7%	83.5%	81.1%	85.5%
Chile	11.6%	7.5%	7.6%	7.7%	6.9%	4.3%
European Union	5.5%	1.9%	2.6%	1.2%	2.0%	0.4%
Italy	4.7%	1.7%	2.4%	0.8%	1.9%	0.3%
New Zealand	4.0%	4.1%	2.9%	3.8%	5.1%	5.3%
China	1.3%	1.2%	1.5%	0.8%	1.0%	1.5%

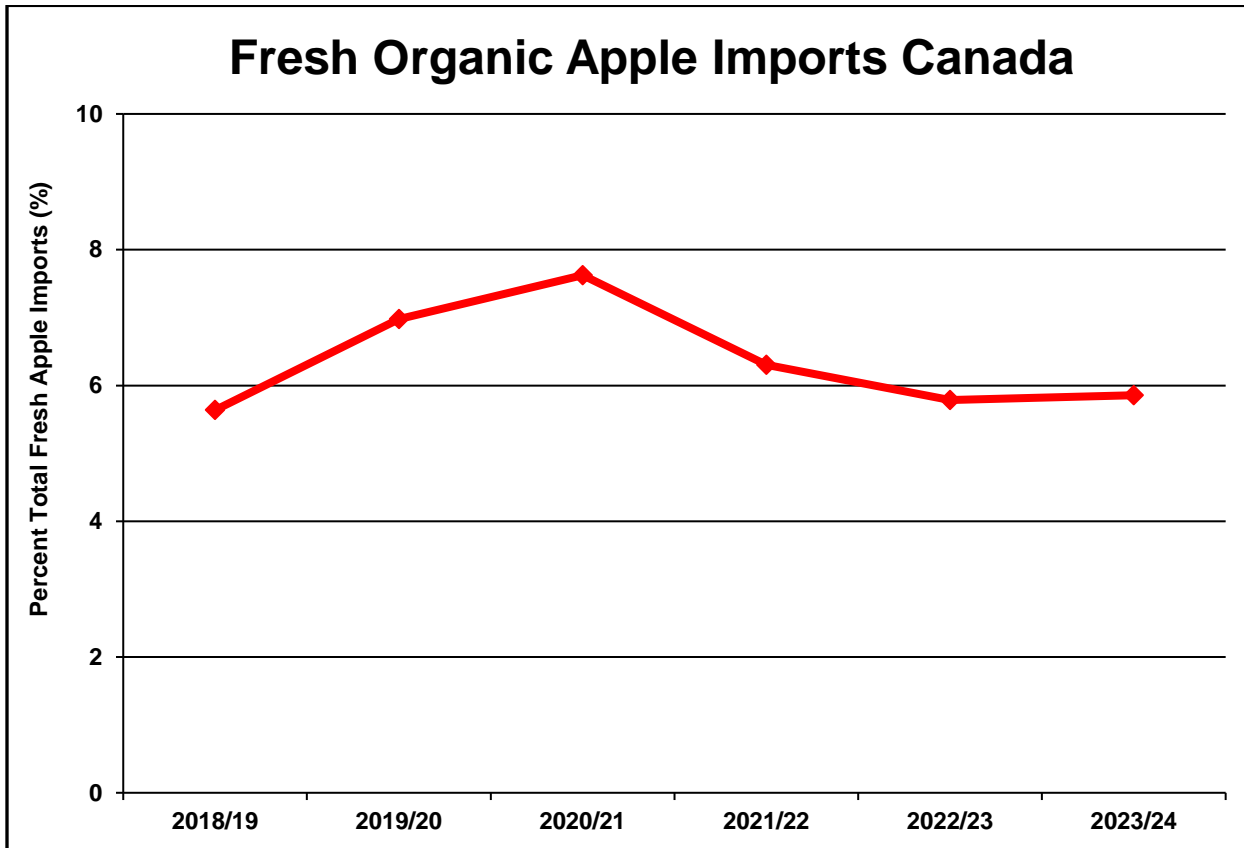
Source: Trade Data Monitor

Note: Tariff lines for organic apples were introduced on January 1, 2007

Imports of organic apples had increased steadily year-over-year since MY 2015/16 but dropped off in MY 2021/22. Organic imports stabilized in MY 2023/24. Organics remain a small percent of overall

imports and higher pricing has impacted the growth trend. Organic imports are likely to continue to struggle in MY 2024/25 unless there is a sharp change in pricing.

Figure 7. Imports of fresh organic apples into Canada as a percent of overall imports by volume.



Source: Trade Data Monitor.

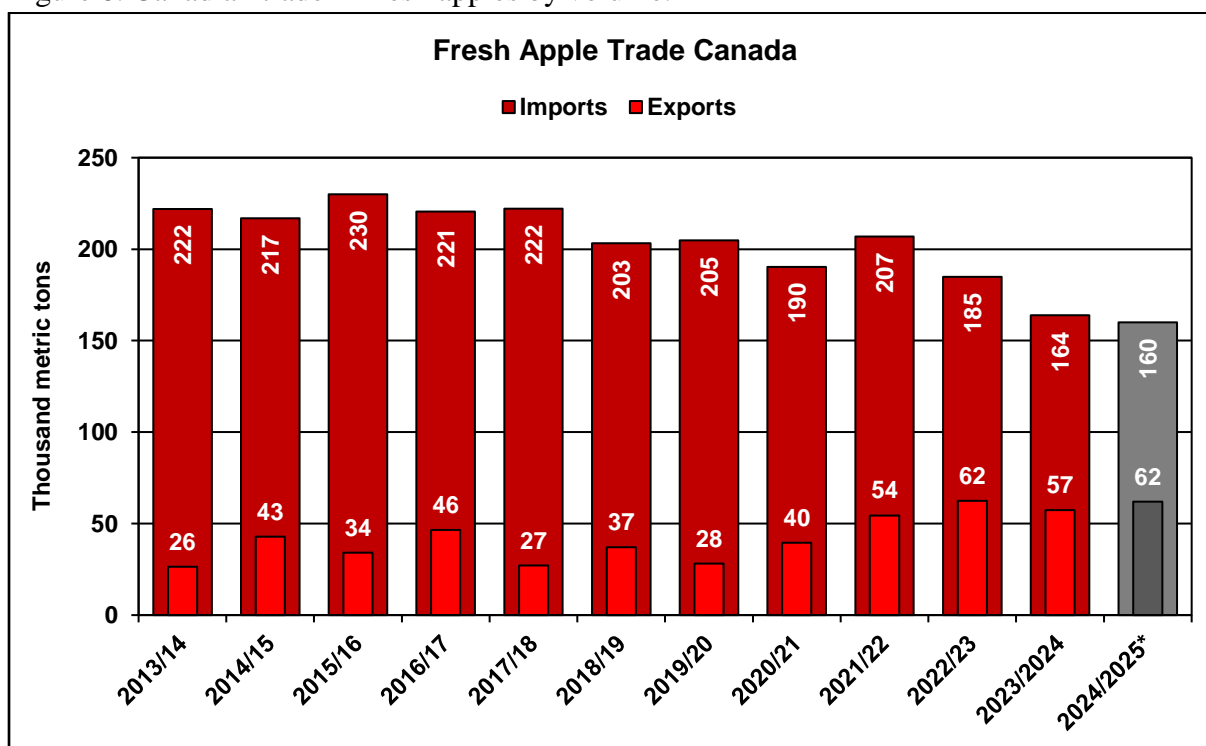
Canadian exports of fresh apples as a percent of production have grown since MY 2019/20. Exports used to comprise around ten percent of total production, whereas exports as a percent of production have averaged 13 percent in the past five-years and have been greater than 15 percent of production for the past three years. Limited processing capacity in Canada means that in years with more quality challenges, Canada has more processing apples available for export. With a good quality Ontario crop and a large Quebec crop, FAS/Ottawa forecasts Canada’s exports to grow eight percent for MY 2024/25. Exports as a percent of overall production will remain relatively stable. Canada should continue to push larger volumes of apples to Vietnam, a market which is now tariff free, due to participation in the Comprehensive and Progressive Trans-Pacific Partnership (CPTPP). A smaller U.S. crop could also provide opportunities for Canadian exporters to fill the gap in some U.S. export markets. Geopolitical tensions between Canada and India and removal of tariffs on U.S. apple exports to India has seen Canada lose the gains it had made in India. This should continue in MY 2024/25. The United States will remain an important market for Canadian exports given geographic proximity.

Table 3. Exports of fresh apples from Canada by volume.

Canada: Exports of fresh apples						
<i>Marketing year: July-June / Quantity in metric tons</i>						
	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
World	37,072	28,177	39,536	54,475	62,405	57,332
for processing	20,320	15,445	20,534	20,071	24,064	19,641
other	16,752	12,732	19,001	34,404	38,341	37,691
United States	22,896	14,802	20,887	21,548	24,771	22,430
for processing	14,560	10,382	15,770	16,392	20,223	15,967
other	8,335	4,420	5,118	5,156	4,548	6,464
Vietnam	2,220	5,051	9,608	8,645	23,365	31,692
India	0	0	0	2,702	4,198	1,170
Cuba	3,367	5,787	975	1,564	1,210	646
All other countries	8,589	2,537	8,066	22,718	13,059	2,564

Source: Trade Data Monitor

Figure 8. Canadian trade in fresh apples by volume.



Source: Trade Data Monitor/ *FAS/Ottawa forecast

PEARS

Table 4. Production, Supply, and Distribution of fresh pears.

NOTE: "NEW FAS/Ottawa" data reflect FAS/Ottawa's assessments and are NOT official USDA data

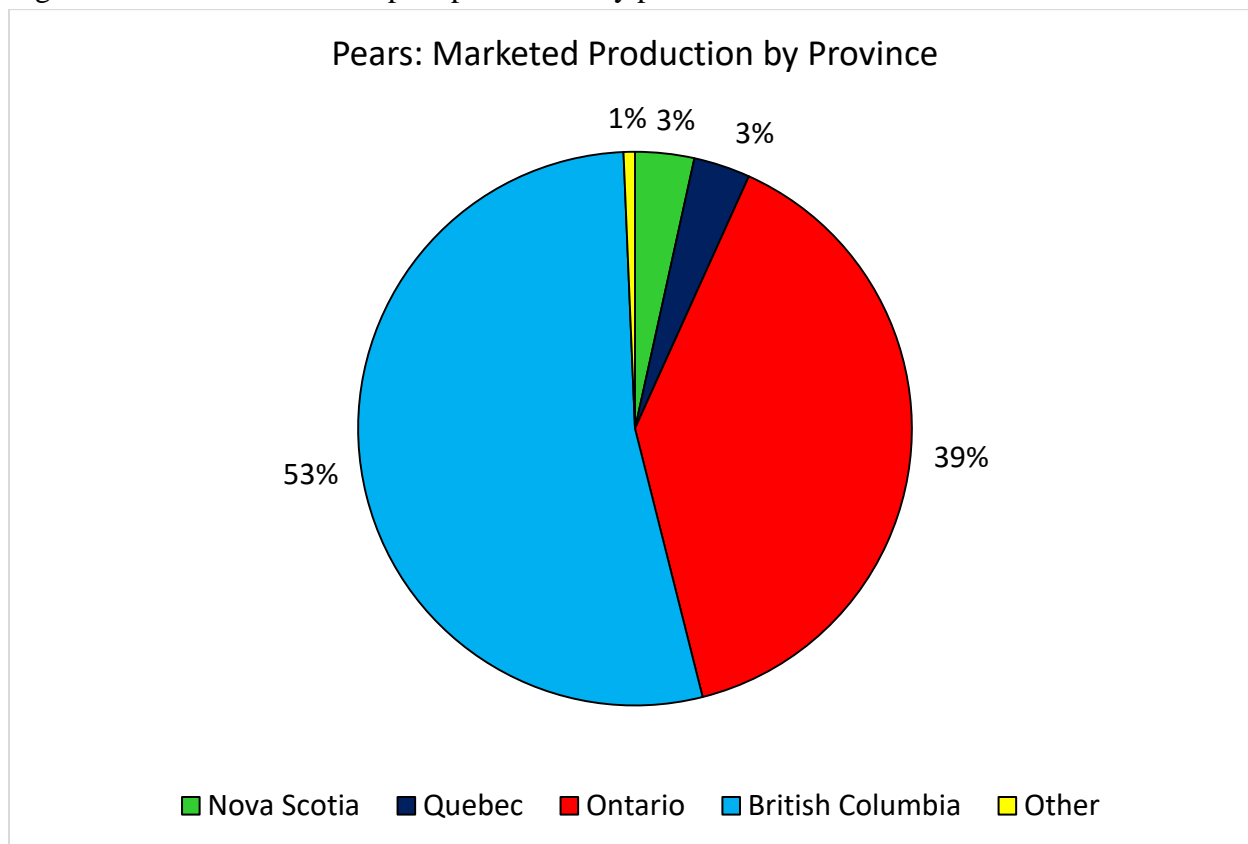
PEARS Fresh Canada	2022/2023		2023/2024		2024/2025*	
	<i>Marketing Year: July-June</i>					
	USDA Official	NEW FAS/Ottawa Data	USDA Official	NEW FAS/Ottawa Data	USDA Official	NEW FAS/Ottawa Estimates
Production	8,826	8,727	8,860	9,199	0	8,400
Imports	53,100	53,164	60,000	58,626	0	58,000
Total Supply	61,926	61,891	68,860	67,825	0	66,400
Domestic Consumption	61,826	61,810	68,560	67,555	0	66,050
Exports	100	81	300	270	0	350
Total Distribution	61,926	61,891	68,860	67,825	0	66,400

*Data in hectares or metric tons / *FAS/Ottawa forecast*

Production:

FAS/Ottawa forecasts a nine percent decline in Canadian pear production for MY 2024/25. A January 2024 extreme cold event in British Columbia is estimated to have reduced the pear crop in that province by 20 to 30 percent. Conversely, the Ontario and Quebec pear crops had better growing conditions. Ontario pears received timely rains and the pear crop is estimated to be up by as much as 30 percent on MY 2023/24 volumes. British Columbia is historically the main Canadian pear producing province with over 50 percent of Canadian production and Ontario accounts for roughly 40 percent. A larger volume Ontario crop will help to offset some of the losses in British Columbia, but impact to the British Columbia crop will still drive down overall production in Canada.

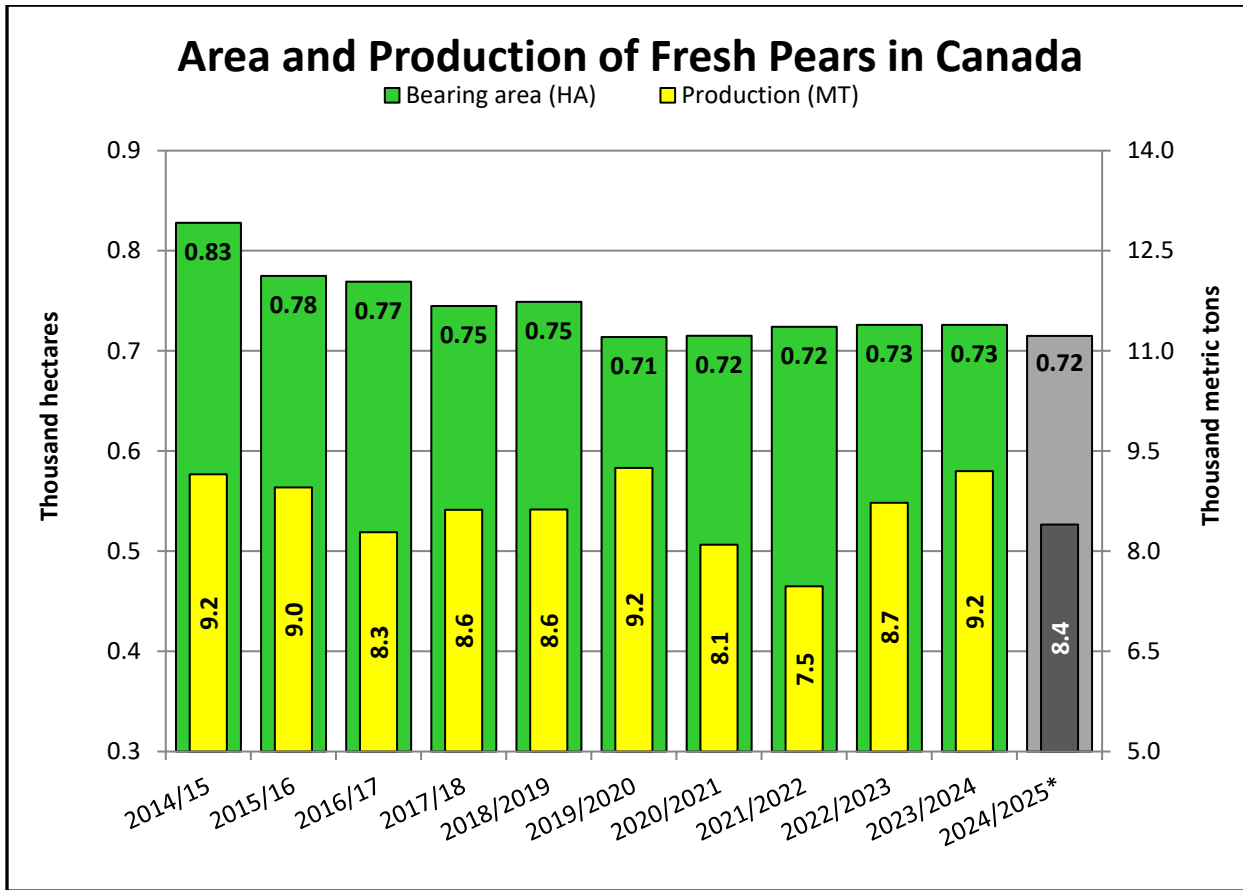
Figure 9. Canadian marketed pear production by province for 2023.



Source: Statistics Canada

FAS/Ottawa forecasts that Canadian acreage will remain relatively stable for MY 2024/25. Orchard modernization has meant that some growers have converted orchards to high density plantings leading to some decline in acreage. Acreage changes are more likely to be reflected as shifts in variety acreage. Ontario is reportedly continuing to reduce Bosc acreage due to disease pressures but this is being replaced by other varieties. Canadian production continues to remain relatively small and is predominately marketed fresh to local markets and domestically. There is very limited pear processing capacity in Canada.

Figure 10. Area (hectares) and production (metric tons) of fresh pears in Canada.



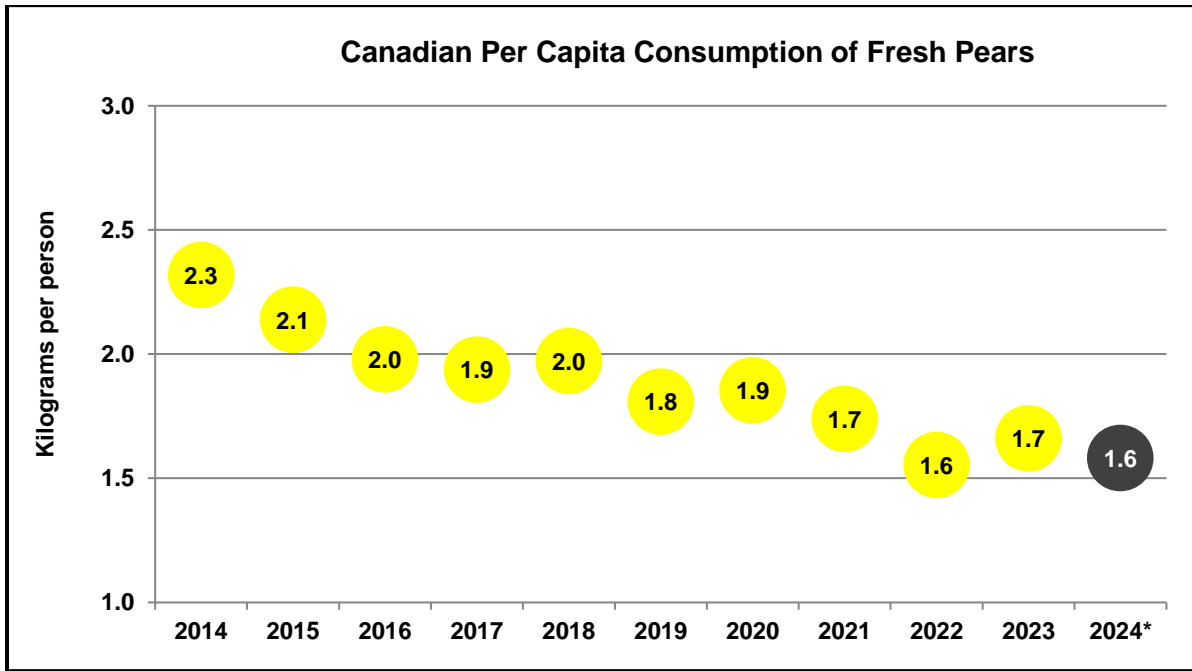
Source: Statistics Canada / *FAS/Ottawa forecast

Labor availability continues to be a challenge for industry and Canadian consumers continue to raise concerns over a rising cost of living, including inflation in food outpacing general inflation. Retailers and growers are facing pressure to keep costs low for consumers but amidst higher growing costs, growers will either need to find ways to improve efficiencies or potentially face lower earnings against these cost of production increases.

Consumption:

FAS/Ottawa forecasts a two percent decline in domestic consumption for MY 2024/25. Per capita consumption will also subsequently decline. Less domestic availability will be and a shorter U.S. pear crop will weigh on import availability. Typically, 90 percent of Canadian consumption of fresh pears is satisfied through imports, with U.S. imports fulfilling roughly 40 percent of demand.

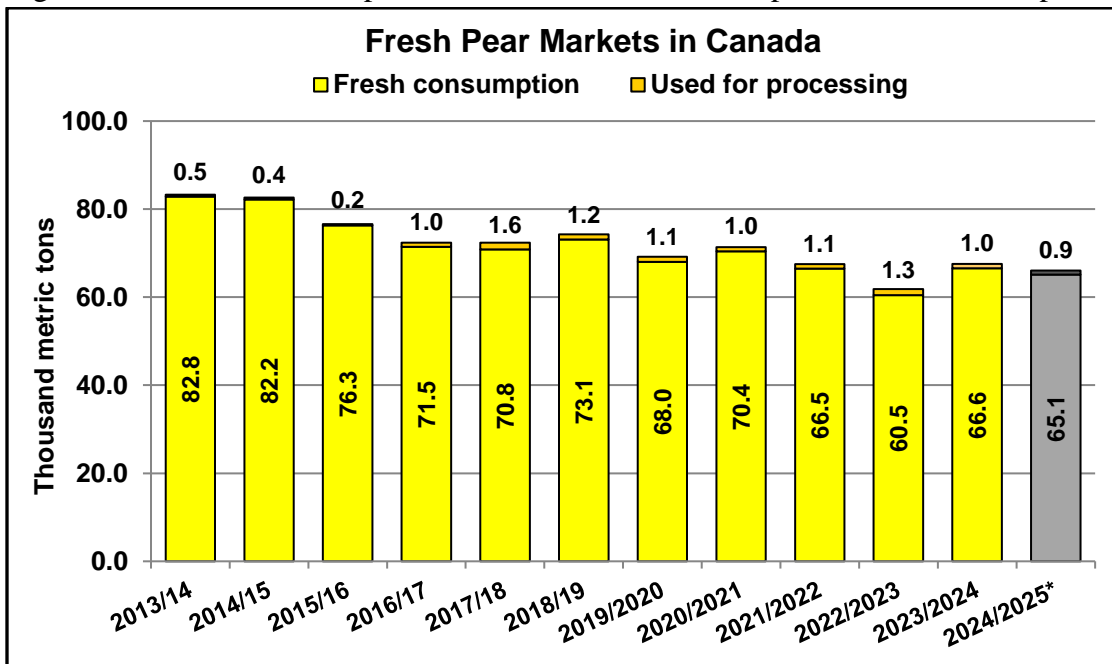
Figure 11. Evolution of Canadian per capita consumption of fresh pears.



Source: Statistics Canada / *FAS/Ottawa forecast

Fresh consumption continues to be the main market for pears in Canada. There is limited processing within Canada and niche cidery operations would mainly use local crop in their production. Processing volumes will decline in MY 2024/25.

Figure 12. Volume of fresh pears destined for fresh consumption and for further processing in Canada.



Source: Statistics Canada / *FAS/Ottawa forecast

Trade:

FAS/Ottawa forecasts fresh pear imports fall one percent in MY 2024/25. While a smaller Canadian pear crop will leave gaps, a significant forecasted reduction in the U.S. pear crop will impact Canada's import volumes. The United States supplies over 40 percent of Canada's fresh pear imports. A one percent reduction is likely optimistic should the U.S. pear crop be as small as earlier industry estimates suggested.

This United States will likely see a decline in market share of Canada's pear imports for MY 2024/25 due to a smaller U.S. crop. This will provide an opportunity for other suppliers to grow market share, a trend that has been materializing for several years as U.S. share has somewhat eroded. However, geographic proximity will continue to support the United States as the main supplier conditional on U.S. production.

Table 5. Imports of fresh pears into Canada by volume.

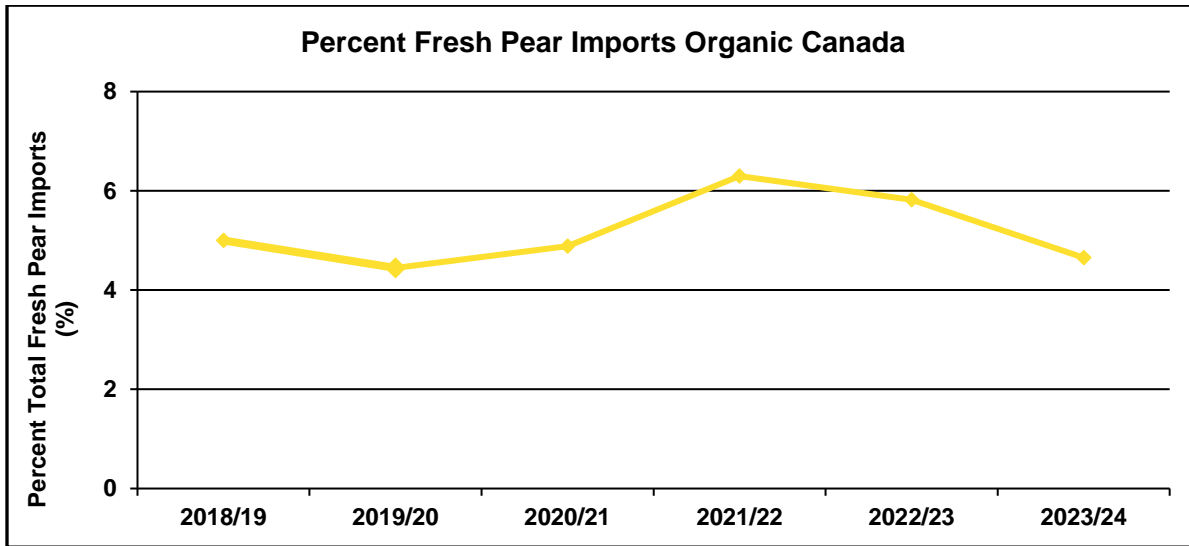
Canada: Imports of fresh pears						
<i>Marketing year: July-June / Quantity in metric tons</i>						
	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
World	65,850	60,305	63,491	60,313	53,164	58,626
for processing	411	211	126	448	820	252
organic	3,292	2,681	3,101	3,798	3,093	2,728
other	62,147	57,412	60,263	56,067	49,251	55,647
United States	35,676	28,972	30,217	30,830	24,531	27,841
for processing	411	211	126	435	820	252
organic	1,794	1,266	1,671	1,762	1,431	1,225
other	33,471	27,495	28,420	28,633	22,281	26,365
Argentina	9,729	10,500	11,974	11,005	10,806	9,716
China	9,204	11,341	9,897	8,243	8,638	10,426
South Africa	6,241	4,592	6,521	6,219	6,275	7,136
European Union	2,569	2,753	2,757	2,284	1,598	1,570
Portugal	2,032	2,350	2,094	2,085	1,392	1,463
All other countries	2,968	2,550	2,788	1,931	1,522	2,044
Import Market Shares						
United States	54.2%	48.0%	47.6%	51.1%	46.1%	47.5%
Argentina	14.8%	17.4%	18.9%	18.2%	20.3%	16.6%
China	14.0%	18.8%	15.6%	13.7%	16.2%	17.8%
South Africa	9.5%	7.6%	10.3%	10.3%	11.8%	12.2%
European Union	3.9%	4.6%	4.3%	3.8%	3.0%	2.7%
Portugal	3.1%	3.9%	3.3%	3.5%	2.6%	2.5%

Source: Trade Data Monitor

Note: Tariff lines for organic pears were introduced on January 1, 2007

Imports of fresh organic pears have continued to fall since their high of MY 2021/22. FAS/Ottawa forecasts that this will continue in MY 2024/25 on availability and pricing.

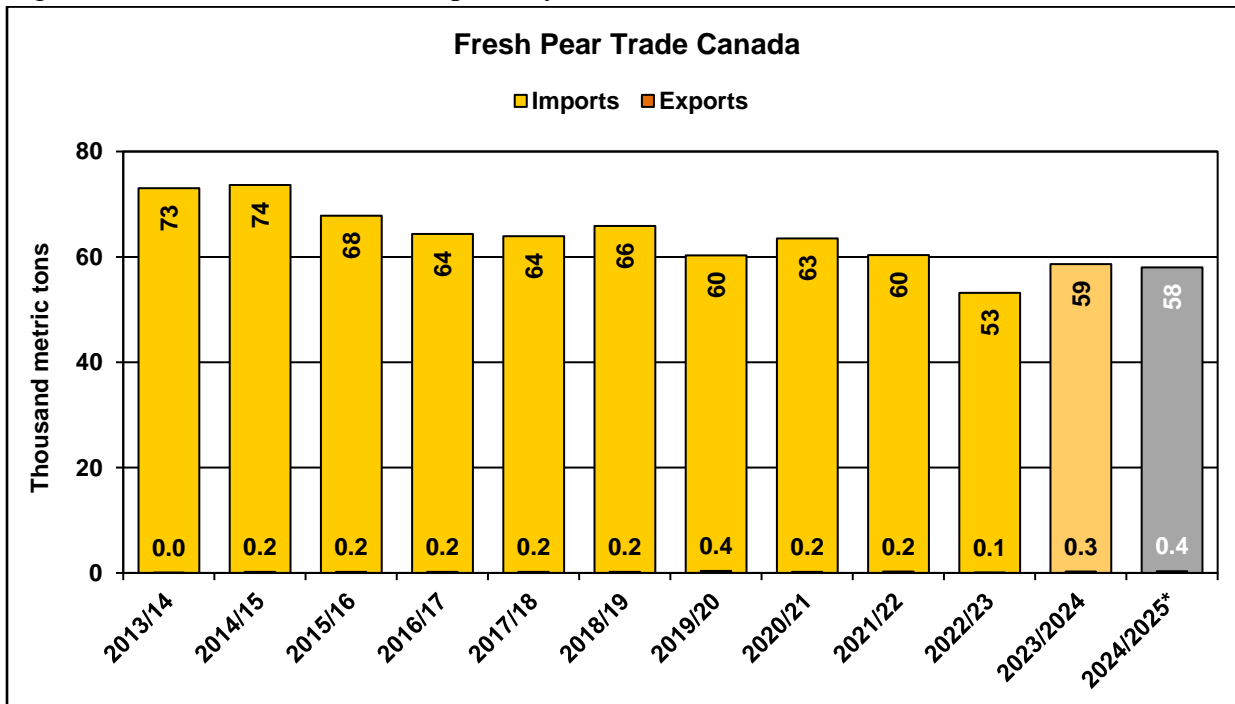
Figure 13. Imports of fresh organic pears into Canada as a percent of overall imports by volume.



Source: Trade Data Monitor

Canadian exports of fresh pears remain negligible against imports given Canada’s small production. Canadian exports continue to remain less than one percent of fresh pear imports by volume. Given the impacts to pear production in British Columbia and the United States, Ontario pears may move into Western Canada in larger volumes than a typical year. Additional opportunities for export to the United States will also likely be explored.

Figure 14. Canadian trade in fresh pears by volume.



Source: Trade Data Monitor/ *FAS/Ottawa forecast

FRESH TABLE GRAPES

Table 6. Production, Supply, and Distribution of fresh grapes.

NOTE: "NEW FAS/Ottawa" data reflect FAS/Ottawa's assessments and are NOT official USDA data

GRAPES Fresh Canada	2022/2023		2023/2024		2024/2025*	
	<i>Marketing Year: June-May</i>					
	USDA Official	NEW FAS/Ottawa Data	USDA Official	NEW FAS/Ottawa Data	USDA Official	NEW FAS/Ottawa Estimates
Production	2,300	2,305	2,350	2,201	0	1,850
Imports	177,500	177,870	170,000	176,573	0	180,000
Total Supply	179,800	180,175	172,350	178,774	0	181,850
Domestic Consumption	179,800	180,175	172,350	178,774	0	181,850
Exports	0	0	0	0	0	0
Total Distribution	179,800	180,175	172,350	178,774	0	181,850

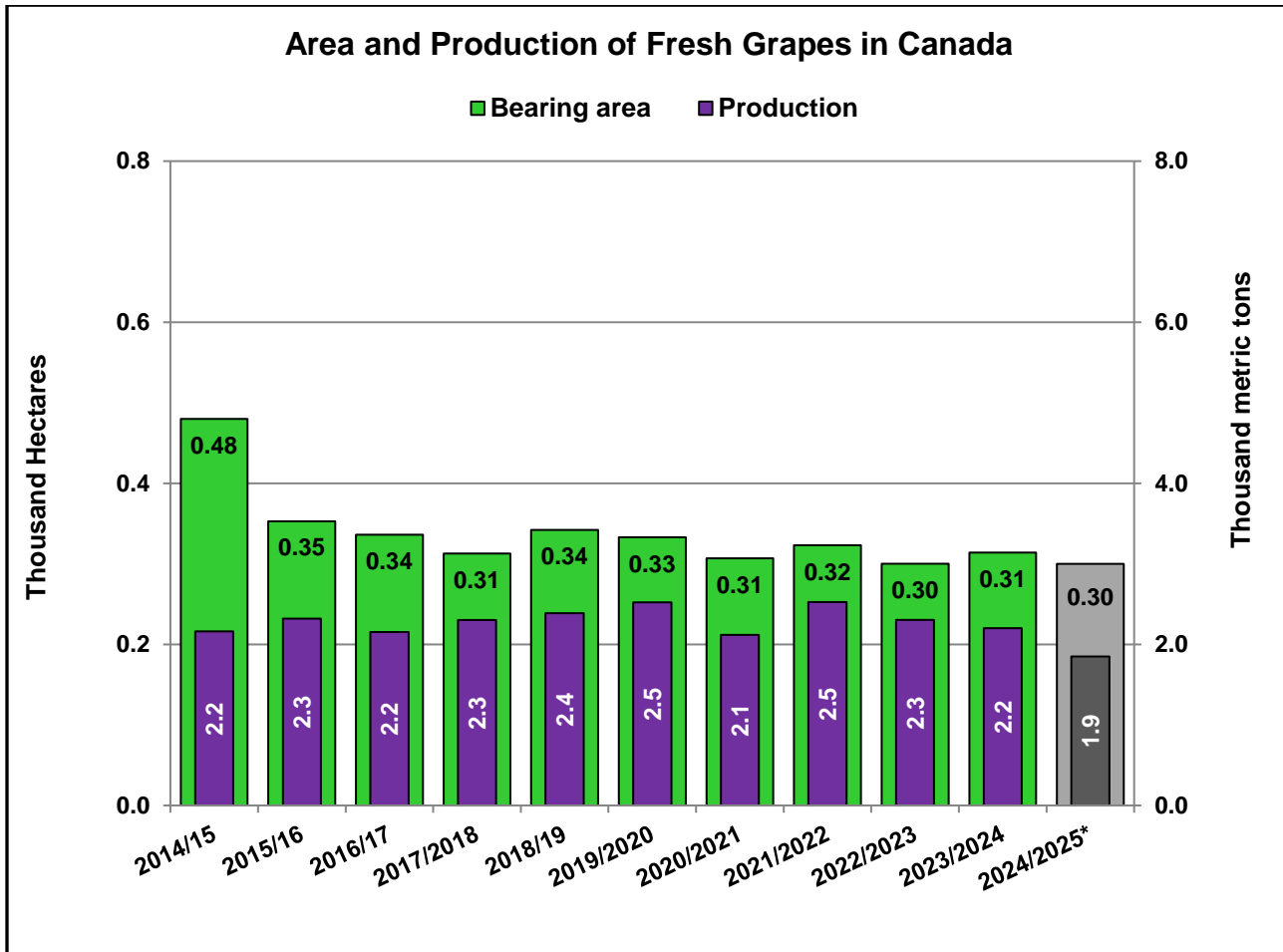
*Data in metric tons / *FAS/Ottawa forecast*

Production:

The majority of grape acreage and production in Canada is wine grapes while table grapes comprise less than five percent of total Canadian grape production.

FAS/Ottawa forecasts a sixteen percent decline in grape production for MY 2024/25 with adverse weather events impacting Ontario and British Columbia. Ontario is the main table grape producing region in Canada at over 80 percent of Canada's production. While early signs in vineyards led to optimism about a good crop, contacts report that this did not materialize. Earlier frost events were more impactful than originally thought and fewer and smaller bunches matured. Ontario continues to trial new varieties to appeal to changing consumer preferences. Green, seedless grapes may shift into commercial production in the province in the coming years if trials prove successful.

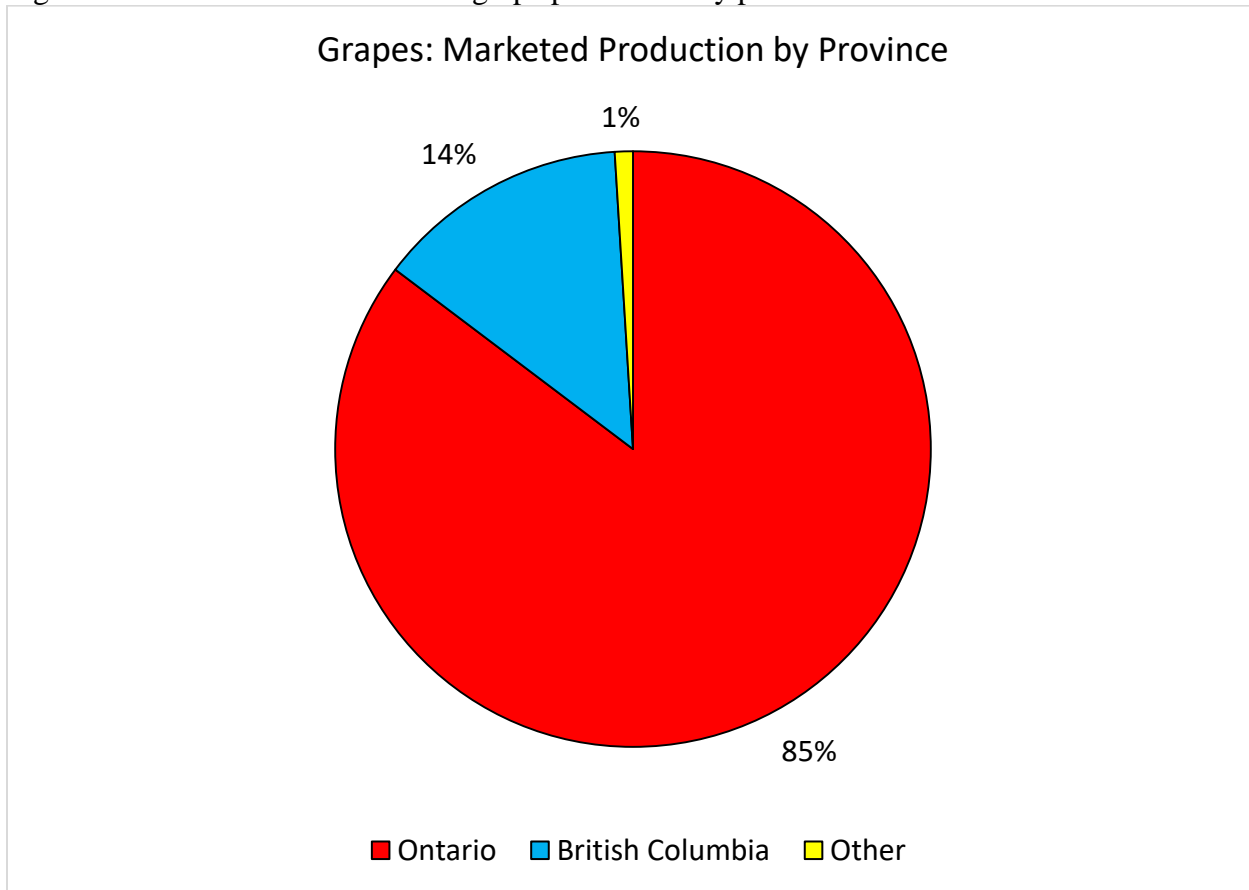
Figure 15. Area (hectares) and production (metric tons) of fresh grapes in Canada.



Source: Statistics Canada / *FAS/Ottawa forecast

While Ontario and British Columbia lead as the table grape producing provinces, wine grapes continue to dominate acreage in both of these provinces compared to table grape cultivation. Acreage to table grapes in Canada is less than five percent of total grape acreage. FAS/Ottawa forecasts an acreage decline over one percent for MY 2024/25. Weather impacts in 2024 may see additional acreage pulled moving forward.

Figure 16. Canadian marketed table grape production by province for 2023.



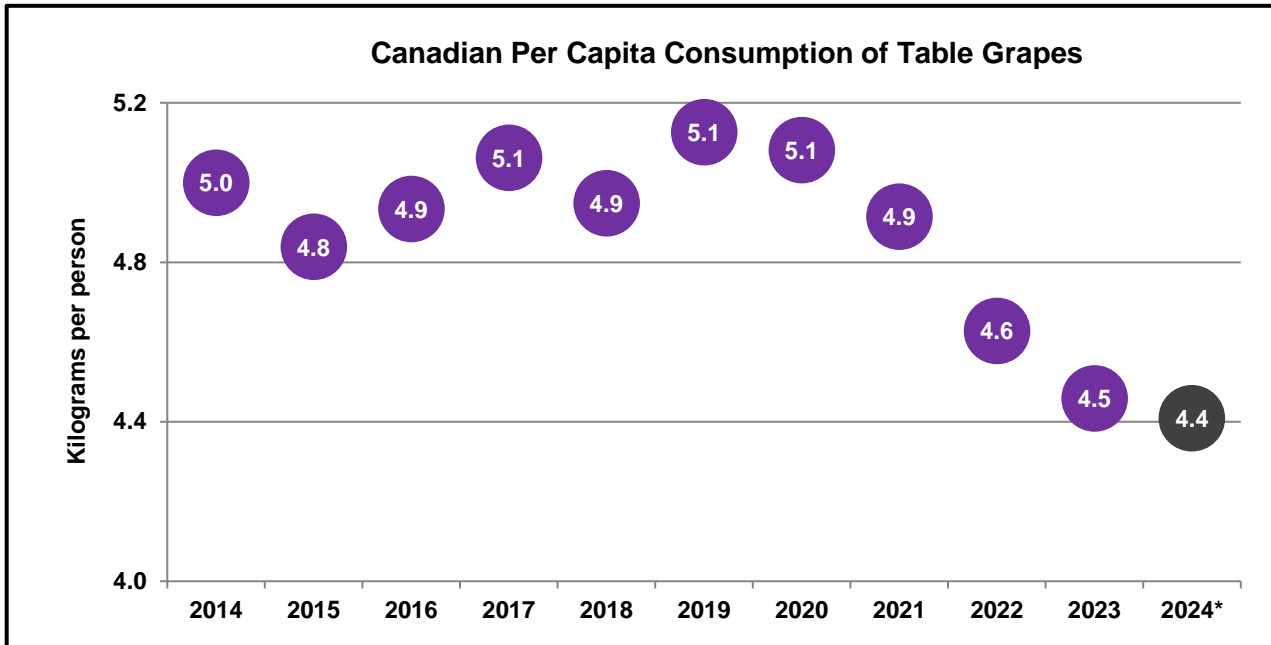
Source: Statistics Canada

Consumption:

Despite a lower domestic production forecast, FAS/Ottawa forecasts a two percent growth domestic consumption of fresh table grapes for MY 2024/25. Recovery of the California table grape crop should see more imports of California grapes into Canada. A growing Canadian population will see per capita consumption decline year-over-year again in MY 2024/25. As with other fruits, competition from a variety of choices and declining fresh produce consumption in Canada are factors.

Imports are critical to support Canadian table grape consumption given the limited domestic production. Over 98 percent of Canadian consumption is typically supplied through imports due to the limited domestic production and availability across Canada. Canadian production tends to be consumed locally, although Ontario does ship a large quantity of grapes to Quebec where there is more consumer demand, and more households make their own fresh jams and jellies. A shorter Ontario crop should see more Ontario production remaining in the province. This will leave market gaps in Quebec and Western Canada to be filled by imports.

Figure 17. Evolution of Canadian per capita consumption of fresh grapes.



Source: Statistics Canada / *FAS/Ottawa forecast

Trade:

FAS/Ottawa forecasts a two percent growth in imports for MY 2024/25. Limited domestic supply within Canada means that there is significant demand to supplement the Canadian production. Recovery of the California crop from adverse weather impacts in MY 2023/24 should see more U.S. table grapes in Canada. U.S. market share has also been eroded in recent years as Canada has increased import volumes from Mexico, South Africa, and Peru. Consumer sensitivity to pricing will see ongoing competition from other source markets for market share. However, geographic proximity will continue to see the United States as the top source market.

Table 7. Imports of fresh grapes into Canada by volume.

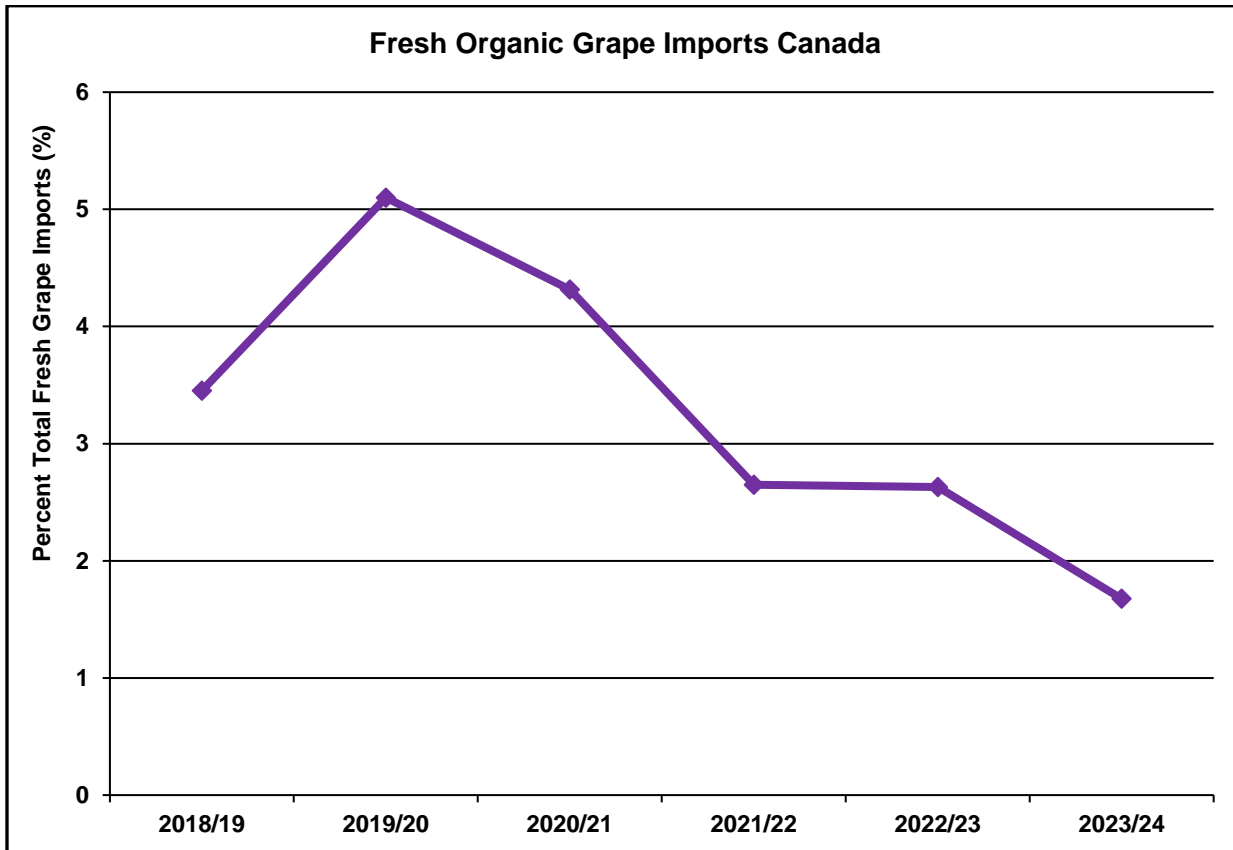
Canada: Imports of fresh grapes						
Marketing year: June-May / Quantity in metric tons						
	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
World	181,141	190,461	191,893	186,448	178,149	178,637
organic	6,253	9,713	8,280	4,940	4,686	2,993
other	174,356	180,241	183,098	180,988	172,897	175,186
United States	98,076	93,751	88,944	85,514	79,010	65,182
organic	4,579	5,861	5,906	3,302	3,291	1,767
other	93,083	87,545	82,556	81,713	75,299	63,039
CPTPP	65,158	72,980	76,544	75,446	80,216	86,065
Chile	33,657	29,709	27,743	28,165	26,076	29,887
Peru	15,459	18,104	23,859	26,947	35,174	29,659
South Africa	13,009	19,907	20,360	21,603	15,422	21,266
Mexico	16,043	25,163	24,942	20,332	18,951	26,494
All other countries	4,897	3,827	6,045	3,887	3,516	6,149
Import Market Shares						
United States	54.1%	49.2%	46.4%	45.9%	44.4%	36.5%
CPTPP	36.0%	38.3%	39.9%	40.5%	45.0%	48.2%
Chile	18.6%	15.6%	14.5%	15.1%	14.6%	16.7%
Peru	8.5%	9.5%	12.4%	14.5%	19.7%	16.6%
South Africa	7%	10%	11%	12%	9%	12%
Mexico	8.9%	13.2%	13.0%	10.9%	10.6%	14.8%

Source: Trade Data Monitor

Note: Tariff lines for organic grapes were introduced on January 1, 2009

Imports of organic fresh table grapes declined as a proportion of total fresh grape imports in MY 2023/24 after remaining flat in MY 2021/22 and MY 2022/23. Availability of organic U.S. table grapes should see a reverse of this trend for MY 2024/25. Organic grapes will continue to remain a small proportion of the overall import volume and domestic demand picture for table grapes in Canada.

Figure 18. Imports of fresh organic grapes into Canada as a percent of overall imports by volume.



Source: Trade Data Monitor, LLC

Canadian exports of fresh table grapes are extremely minimal though Canada does import some fresh table grapes which are then re-exported. These re-exports account for all of Canada's exports of fresh table grapes according to sources. Sources indicate that domestic production is entirely distributed to the domestic market at this time, as domestic production of table grapes remains limited against domestic demand.

ADDITIONAL INFORMATION

Prices

Agriculture and Agri-Food Canada (AAFC) monitors fresh apple, pear and grape prices in the major Canadian wholesale markets. Any daily and weekly market wholesale prices are made available electronically at the AAFC [InfoHort website](#).

Policy:

Quebec Bill 96

The Government of Quebec published Bill 96, An Act respecting French, the official and common language of Quebec, in June 2022. Bill 96 expands linguistic obligations and requirements of the French Charter. As such, it has introduced significant trademark amendments and translation requirements for non-French inscriptions on product packaging, labeling, public signage, posters and commercial advertising. Non-compliant products which are made prior to December 31, 2025 can be sold until June 1, 2027. Updated FAS/Canada coverage of developments related to Bill 96 can be found in [GAIN](#).

Grocer Code of Conduct

The [Grocer Code of Conduct](#) cleared a significant hurdle in July 2024 with all major grocers having committed to supporting the Code. The intent that the Code will be implemented in July 2025. The Code currently remains voluntary.

Plastic Packaging

The Government of Canada is developing a regulatory framework on plastic packaging that would establish mandatory requirements for recycled content and labeling requirements. As part of this, they also have proposed to require all produce PLU stickers would be required to be compostable. FAS/Canada continues to follow the development of this regulatory framework with reports published through [GAIN](#).

Promotion and Research Agency

The Canadian apple industry has been discussing the idea of establishing a national marketing agency to promote the consumption of apples and conduct various research projects for several years. This discussion is still occurring although no formal proposals have been put forth at this time. Such an agency would collect levies on both the domestic production and on imports of apples to fund its activities.

Attachments:

No Attachments