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A Snapshot of the Canadian Apple Industry, 2010

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Introduction

Canada has a long and proud history of growing apples. First brought over by European settlers in the 17th century, apples were a pillar of the developing national economy and can be credited with sparking early investment in the young nation. In 2010, the farm gate value¹ of the Canadian apple crop was estimated at \$148.5 million, while total acreage used for apple production represented about 16%² of all acreage planted with fruits in Canada. Canadian apple production has been decreasing since 1999. This brochure will highlight the current state of the apple industry in Canada.

Planted Acreage and Number of Farms

According to Statistics Canada data, the total planted acreage³ for apples has been steadily decreasing over the last decade, as illustrated in Table 1, and was estimated at 18,110 hectares in 2010. This downward trend is due primarily to a switch to other tree fruits as well as to the adoption of high density apple plantings requiring less acreage, as old apple varieties are replaced with newer varieties that are more in demand by consumers.

Table 1 – Planted Acreage for Apples by Province

Province	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Hectares										
Nova Scotia	2,630	2,550	2,550	2,469	2,388	2,428	2,469	2,428	2,226	1,851
New Brunswick	416	413	445	405	364	324	304	283	255	227
Quebec	6,843	6,677	6,677	6,637	6,515	6,475	6,414	6,280	6,024	5,989
Ontario	9,814	8,903	8,903	7,608	7,568	8,094	7,689	7,284	7,541	6,394
British Columbia	5,982	5,868	5,868	5,666	4,654	4,371	4,654	3,845	3,794	3,550
Canada	25,799	24,522	24,552	22,889	21,586	21,813	21,645	20,205	19,929	18,110

Source: Statistics Canada (22-003-X - Fruit and Vegetable Production)

Over the last ten years, the total planted acreage for apples in Canada has decreased by 7,689 hectares, or 30%. Ontario and British Columbia, which have lost 3,420 and 2,432 hectares respectively since 2001, accounted for the majority of this reduction.

There are five provinces that account for the bulk of apple production in Canada. Due to having unique microclimates, New Brunswick, Nova Scotia, Quebec, Ontario and British Columbia all have suitable environments for growing apples.

¹ Farm Gate Value represents production values expressed as remuneration obtained at the “Farm Gate” and is related to gross returns to growers. This does not include program payments or other support payments made to producers.

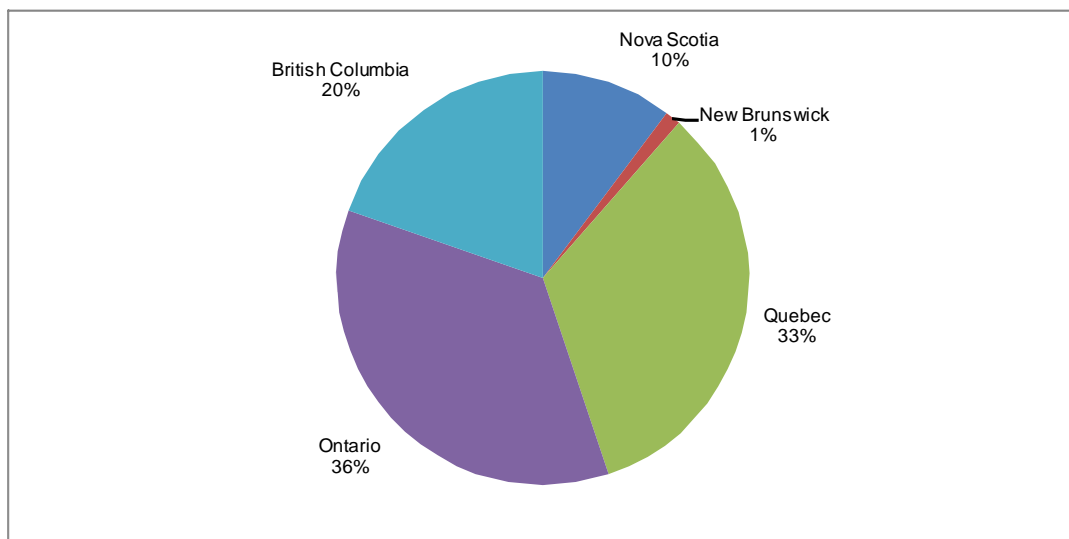
² Statistics Canada (22-003-X - Fruit and Vegetable Production).

³ Total planted acreage for apples includes bearing and non-bearing areas.



In 2010, Ontario had the largest land area set aside for growing apples, making up 36% of the national total, followed by Quebec with 33% and British Columbia with 20% of the area used for growing apples (Figure 1).

Figure 1 – Provincial Shares of Total Planted Acreage for Apples, 2010



Source: Statistics Canada (22-003-X - Fruit and Vegetable Production)

Table 2 – Number of Apple Farms⁴ in Canada

Province	2001	2006	% Change
Nova Scotia	272	228	(16)
New Brunswick	72	61	(15)
Quebec	803	741	(8)
Ontario	1,419	1,223	(14)
British Columbia	1,986	1,771	(11)
Other Provinces	138	166	20
Canada	4,690	4,190	(11)

Note:

The 2011 Census of Agriculture data were not available at the time of the publication of this report.

Source: Statistics Canada (95-629-XWE, Census of Agriculture, 2006)

New Brunswick, as one of the first settled regions in Canada, has a rich history of growing apples. The varieties grown include the iconic Canadian McIntosh, which the *Apple Growers of New Brunswick (Producteurs de pommes du Nouveau-Brunswick)* record as being grown there since the 1930s. The popular Honeycrisp apple is a relatively new variety for the province.

Nova Scotia shares a common history of production with its neighbor New Brunswick, and the organization *Nova Scotia Apples*, a division within the *Nova Scotia Fruit Growers Association*, claims over 40 varieties of apples are grown in the province. The main varieties are the common McIntosh, Red

⁴ The number of farms growing apples reported in the Census of Agriculture refers to farms that report growing apples but do not necessarily grow apples exclusively. Some farms may be producing other commodities. Caution must be exercised when using these numbers.



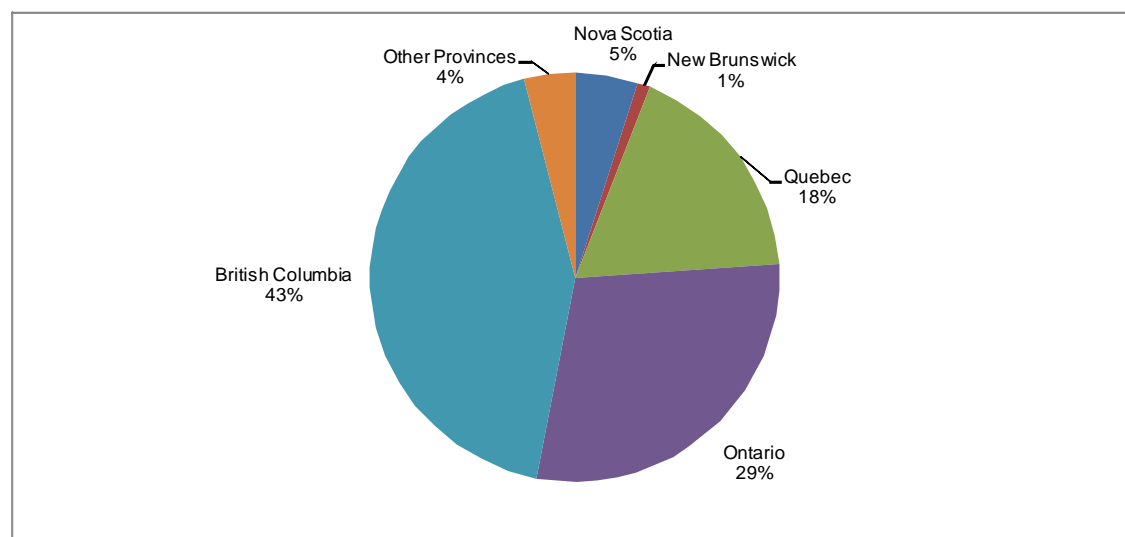
Delicious, Idared, Spartan and Cortland. Nova Scotia now also grows Gala, Jonagold and Honeycrisp, relatively new varieties for the region.

Quebec also has a long history of growing apples which can be traced back to the colonization period. Its producers' association, the *Fédération des producteurs de pommes du Québec*, names the McIntosh, first grown in the province in 1836, its most popular variety. The other major varieties grown in Quebec are Cortland, Spartan and Empire.

The *Ontario Apple Growers* lists 16 varieties grown on a commercial scale in the province, including McIntosh, Empire, Spy, Red Delicious, Idared and Spartan. It also grows the relatively new Fuji, Honeycrisp and Ambrosia varieties.

British Columbia, with its warmer winters and moderate summers, is an ideal province for growing apples. The province dedicates about 61% of its orchard land to apples. Newer varieties like Fuji, Ambrosia and Gala are increasingly popular, grown alongside traditional varieties like Red Delicious, Spartan, McIntosh and Golden Delicious. British Columbia is home to 43% of all farms growing apples in Canada, as shown in Figure 2.

Figure 2 – Number of Apple Farms by Province – Percent Share, 2006



Source: Statistics Canada (95-629-XWE, Census of Agriculture, 2006)



Production

In 2010, the total marketed production⁵ of apples in Canada was 336,834 metric tonnes (mt), the lowest in a 10-year period. Table 3 displays the total marketed apple production data since 2001. The volume of the 2010 apple crop was 23% lower than 2009.

Table 3 – Marketed Production of Apples by Province

Province	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Metric Tonnes ('000)										
Nova Scotia	35.4	40.8	36.3	31.0	39.4	39.0	41.1	38.8	40.4	33.7
New Brunswick	3.8	4.7	4.6	5.0	4.6	4.1	3.6	3.9	4.0	3.7
Quebec	71.5	87.2	66.8	78.9	78.2	87.7	140.6	108.0	119.5	90.2
Ontario	241.5	115.7	145.2	142.4	168.7	154.7	183.7	169.4	178.0	126.6
British Columbia	114.0	133.1	126.1	122.8	117.4	90.7	77.1	106.4	93.3	82.3
Canada	466.6	381.9	379.2	380.6	408.6	376.5	446.4	426.9	435.5	336.8

Source: Statistics Canada (22-003-X - Fruit and Vegetable Production)

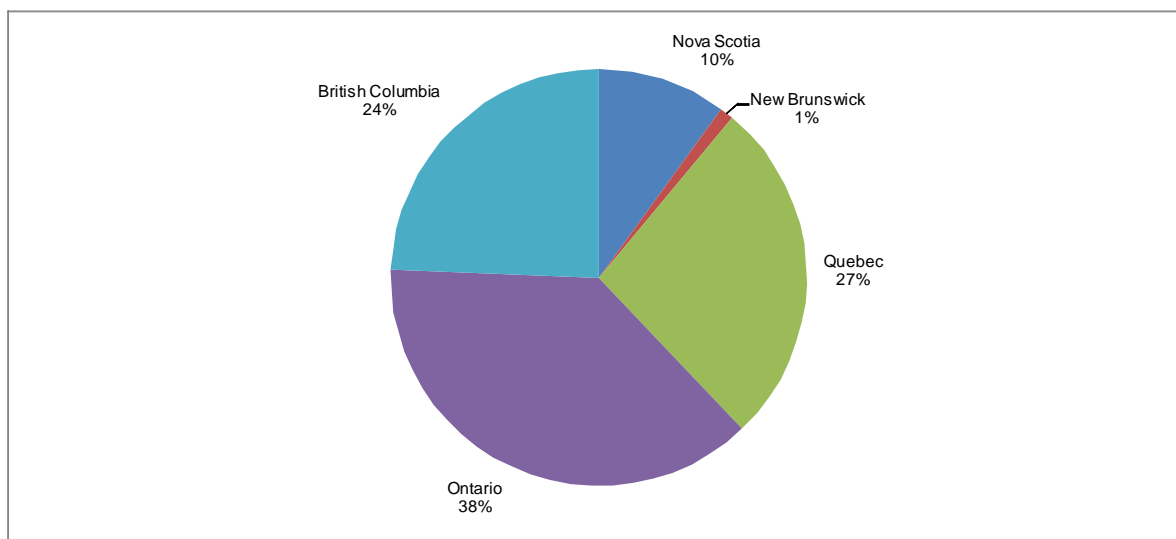
Ontario is the largest apple producing province in the country, with a total marketed production of 126,623 mt of apples in 2010, followed by Quebec and British Columbia in order of importance. Ontario has seen its share of the total Canadian marketed production decrease from about 52% in 2001 to 38% in 2010, while Quebec has seen its share jump from 15% to 27% in the same period and British Columbia's share has remained almost unchanged at 24% of the total marketed production. In the last ten years, marketed production has declined in both Ontario and British Columbia, while it has significantly increased in Quebec, making it the second largest apple producing province behind Ontario. Production in the Maritimes has remained relatively stable.

⁵ Total Marketed Production is defined as the total quantity sold to the fresh and processing markets.



Figure 3 illustrates the provincial shares of total Canadian marketed production for the five main producing provinces: Ontario (38%), Quebec (27%), British Columbia (24%), Nova Scotia (10%) and New Brunswick (1%).

Figure 3 – Marketed Production of Apples by Province – Volume Percent Share, 2010



Source: Statistics Canada (22-003-X - Fruit and Vegetable Production)



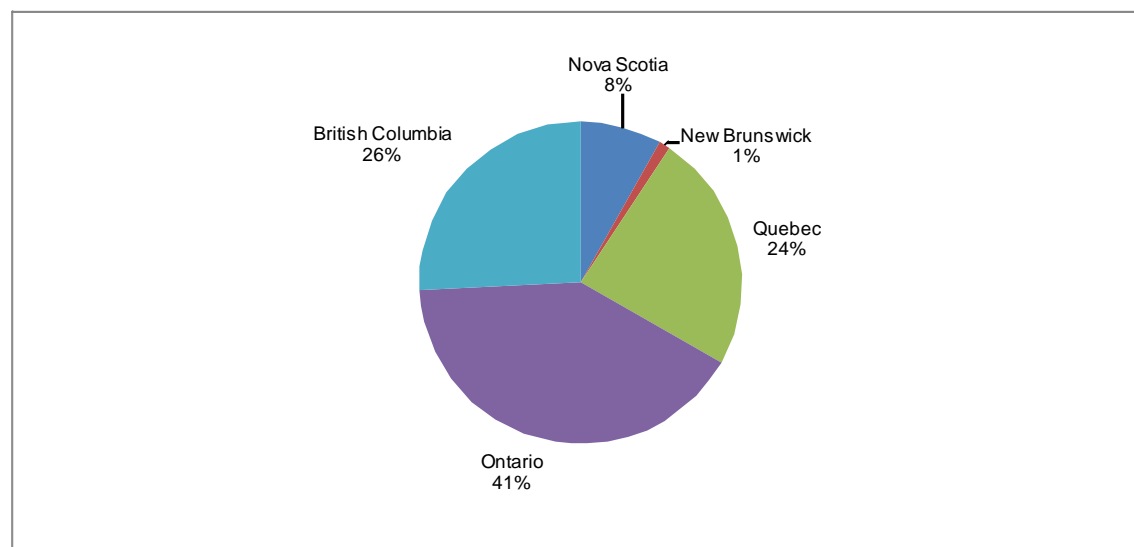
Coinciding with the drop in production was a decrease in total Farm Gate Value (FGV). In 2010, the total FGV for Canadian apples was estimated at \$148.5 million, 18% lower than the previous year. Table 4 shows the provincial and national data for FGV over the past ten years, and Figure 4 illustrates the provincial shares of the total FGV for apples in 2010.

Table 4 – Farm Gate Value of Apples by Province

Province	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Value (\$ Million)										
Nova Scotia	8.0	12.0	9.0	8.8	9.9	10.5	11.8	12.3	14.5	12.2
New Brunswick	2.2	3.1	1.8	2.5	2.2	1.5	1.7	2.0	2.0	1.6
Quebec	23.4	36.0	25.9	28.2	29.2	34.7	46.8	46.5	43.0	35.7
Ontario	97.4	56.2	55.0	48.9	60.5	62.2	75.0	75.4	85.6	61.0
British Columbia	34.9	49.4	61.0	34.6	36.7	38.5	44.8	35.2	36.5	37.7
Canada	166.3	157.1	153.0	123.2	138.7	147.6	180.4	171.7	181.9	148.5

Source: Statistics Canada (22-003-X - Fruit and Vegetable Production)

Figure 4 – Farm Gate Value of Apples by Province – Percent Share, 2010



Source: Statistics Canada (22-003-X - Fruit and Vegetable Production)



Canadian Imports and Exports

Imports

Canada runs a trade deficit when it comes to apples. In 2010, Canada imported a total of 191,714 mt of fresh apples (Table 5). This represents a 22% increase over the last five years and a 5% increase from the previous year. The United States was Canada's biggest supplier of fresh apples, with a total of 150,618 mt (79% of all our fresh apple imports), worth an estimated \$138 million. Chile has made steady gains over the years to become Canada's second largest supplier of fresh apples, with a total of 24,868 mt representing 13% of Canada's total fresh apple imports. New Zealand is Canada's third largest supplier of fresh apples, exporting 7,759 mt to Canada in 2010, followed by China and South Africa.

Table 5 – Canada's Top 5 Fresh Apple Import Sources

Country	2006	2007	2008	2009	2010
Metric Tonnes					
United States	124,829	139,808	131,199	148,111	150,618
Chile	16,951	23,321	18,361	20,257	24,868
New Zealand	7,187	8,273	6,953	7,685	7,759
China	4,731	4,942	6,148	3,551	3,768
South Africa	2,639	2,995	2,816	1,919	2,334
Total - Canada	156,694	180,528	166,251	182,143	191,714
Value (\$000)					
United States	126,336	140,064	154,086	136,579	138,046
Chile	21,779	28,114	22,203	26,474	29,185
New Zealand	10,490	11,563	10,186	11,376	11,699
China	5,505	5,580	7,229	4,538	4,801
South Africa	3,409	4,216	3,701	2,797	3,638
Total - Canada	167,900	191,238	198,613	182,595	189,645

Source: Statistics Canada (Catsnet - June 6, 2011)



In 2010, the biggest importing province was Ontario, accounting for 39% of all imported fresh apples, followed closely by British Columbia with 38% (Table 6).

Table 6 – Fresh Apple Imports by Province

Province	2006	2007	2008	2009	2010
Metric Tonnes					
Nova Scotia	44	212	469	214	64
New Brunswick	258	1,552	1,872	1,728	1,812
Quebec	22,907	27,825	26,724	34,127	41,118
Ontario	75,862	88,863	81,948	79,277	74,497
Manitoba	251	527	447	312	494
Saskatchewan	103	167	55	125	58
Alberta	1,311	1,872	2,408	2,941	1,280
British Columbia	55,958	59,511	52,328	63,418	72,392
Total - Canada	156,694	180,528	166,251	182,143	191,714
Value (\$000)					
Nova Scotia	43	331	757	365	106
New Brunswick	395	2,143	2,833	2,279	2,489
Quebec	17,424	21,275	20,184	23,395	23,614
Ontario	93,355	104,851	108,143	92,279	93,690
Manitoba	338	758	731	418	513
Saskatchewan	261	283	88	145	80
Alberta	2,378	2,956	4,421	4,155	1,791
British Columbia	53,706	58,640	61,456	59,558	67,362
Total - Canada	167,900	191,238	198,613	182,595	189,645

Source: Statistics Canada (Catsnet - June 6, 2011)



Table 7 highlights the varieties of fresh apples imported and the markets (fresh or processing) for which they are destined. Of the 191,714 mt of fresh apples imported in 2010, a total of 143,730 mt were imported for fresh consumption, which represents 75% of imports. The other 24% were used in some form of processing. Of the apples destined for fresh consumption, Gala is the most imported variety, followed by Red Delicious and Granny Smith.

Table 7 – Fresh Apple Imports by Type and Variety

Variety	2006	2007	2008	2009	2010
Metric Tonnes					
Fresh, For Processing*					
McIntosh	2,264	4,157	5,526	7,108	6,037
Idared	4,681	3,102	2,522	2,899	5,610
Golden Delcious	1,251	734	895	668	3,295
Granny Smith	1,573	746	660	746	1,683
Gala	696	884	598	137	278
Red Delicious	4,719	3,788	69	101	80
Empire	36	581	109	301	20
Not Otherwise Specified	2,337	16,430	14,809	22,478	30,678
Total	17,557	30,423	25,188	34,438	47,682
Fresh, Other Than For Processing					
Gala	41,671	47,702	47,046	50,460	57,337
Granny Smith	34,287	37,071	29,856	30,786	25,611
Red Delicious	20,550	21,416	19,774	19,349	18,707
Golden Delcious	17,921	12,608	14,322	14,316	11,216
Empire	512	1,081	245	874	745
McIntosh	310	542	371	371	444
Idared	62	121	82	261	97
Not Otherwise Specified	23,819	29,451	29,005	30,970	29,573
Total	139,132	149,992	140,701	147,385	143,730
Not Defined	4	112	362	319	303
Total - Canada	156,694	180,528	166,251	182,143	191,714

*Includes both certified and non-certified organic.

Source: Statistics Canada (Catsnet - June 6, 2011)



Table 7 (continued) – Fresh Apple Imports by Type and Variety

Variety	2006	2007	2008	2009	2010
Value (\$000)					
Fresh, For Processing*					
Idared	1,038	667	784	774	1,369
McIntosh	311	685	1,245	1,791	905
Golden Delicious	78	113	233	168	848
Granny Smith	95	107	186	206	266
Gala	44	84	126	24	46
Red Delicious	259	358	24	45	19
Empire	8	148	25	80	7
Not Otherwise Specified	218	2,742	3,643	2,876	3,959
Total	2,052	4,903	6,267	5,963	7,420
Fresh, Other Than For Processing					
Gala	54,798	64,335	64,697	69,152	73,374
Granny Smith	38,796	41,020	40,242	33,150	33,066
Red Delicious	22,851	22,789	27,319	20,508	20,093
Golden Delicious	20,218	19,058	19,949	15,236	14,439
McIntosh	282	624	399	462	472
Empire	301	678	197	462	399
Idared	31	64	39	110	51
Not Otherwise Specified	28,565	37,598	38,923	37,068	39,910
Total	165,841	186,166	191,766	176,149	181,805
Not Defined	8	169	580	483	421
Total - Canada	167,900	191,238	198,613	182,595	189,645

*Includes both certified and non-certified organic.

Source: Statistics Canada (Catsnet - June 6, 2011)



Exports

Almost one-tenth of Canada's apple production was exported in 2010, with around 80% sent to the United States, followed by 8% to the United Kingdom and 6% to Mexico. Exports to Taiwan and Costa Rica seem to be recovering after a slump in 2009. The total value of Canada's apple exports was \$24.6 million in 2010 (Table 8).

Table 8 – Canada's Top 5 Fresh Apple Export Destinations

Country	2006	2007	2008	2009	2010
Metric Tonnes					
United States	34,855	31,081	36,036	21,098	20,923
United Kingdom	4,387	2,502	2,706	983	1,766
Mexico	5,521	2,685	2,182	1,446	1,497
Taiwan	567	688	221	137	1,288
Costa Rica	554	557	462	35	192
Total - Canada	47,836	38,811	42,484	25,509	25,969
Value (\$000)					
United States	31,022	28,031	29,882	19,835	20,455
United Kingdom	4,394	2,801	2,893	1,640	1,750
Mexico	4,530	2,419	1,997	1,171	1,529
Taiwan	636	830	242	151	363
Costa Rica	521	536	475	33	181
Total - Canada	43,227	35,842	36,564	24,045	24,614

Source: Statistics Canada (Catsnet - June 6, 2011)

British Columbia is the largest exporting province in Canada, accounting for more than half of all Canadian fresh apple exports. Nova Scotia saw a significant increase in apple exports in 2010, representing an increase of 64% over 2009 (Table 9).

Table 9 – Fresh Apple Exports by Province

Province	2006	2007	2008	2009	2010
Metric Tonnes					
Nova Scotia	2,121	1,585	1,759	1,593	2,619
New Brunswick	0	0	84	20	1
Quebec	5,577	3,674	4,182	1,495	1,038
Ontario	14,139	11,692	14,367	6,353	8,326
British Columbia	26,000	21,859	22,091	16,049	13,985
Total - Canada	47,836	38,811	42,484	25,509	25,969
Value (\$000)					
Nova Scotia	2,542	2,467	2,381	2,895	3,735
New Brunswick	0	0	21	5	0
Quebec	4,891	3,613	5,082	2,421	1,678
Ontario	8,220	5,486	8,242	3,396	6,389
British Columbia	27,574	24,276	20,837	15,328	12,811
Total - Canada	43,227	35,842	36,564	24,045	24,614

Source: Statistics Canada (Catsnet - June 6, 2011)



About 80% of all Canadian fresh apples exports are destined for fresh consumption, and the remaining 20% are destined for processing (Table 10).

Table 10 – Fresh Apple Exports by Type

Type	2006	2007	2008	2009	2010
Metric Tonnes					
Fresh, For Processing	4,191	8,593	10,089	4,345	4,684
Fresh, Other Than For Processing	43,645	30,217	32,395	21,163	21,286
Total - Canada	47,836	38,811	42,484	25,509	25,969
Value (\$000)					
Fresh, For Processing	626	1,261	1,950	744	913
Fresh, Other Than For Processing	42,601	34,582	34,614	23,301	23,701
Total - Canada	43,227	35,842	36,564	24,045	24,614

Source: Statistics Canada (Catsnet - June 6, 2011)

World Trade

As shown in Table 11, in 2009, the Russian Federation was the world's largest importer of apples, according to the Food and Agriculture Organization of the United Nations. The Russian Federation imported just over 1 million mt of apples, about ten times the amount Canada imported in the same year. Canada ranks eighth in the world for imports of apples. China is the world's largest producer of apples and also the largest apple exporting country, with 1.17 million mt exported in 2009, of which 21% went to its major importing neighbor, Russia. The United States is the second largest apple exporting country, with 816,167 mt exported in 2009, followed by Poland, Italy and Chile.

Table 11 – Top 5 Global Importing and Exporting Countries in 2009

Importing Nations		Quantity (metric tonnes)
1	Russian Federation	1,108,210
2	Germany	622,564
3	United Kingdom	455,671
4	Netherlands	360,250
5	Ukraine	251,394
Exporting Nations		
1	China	1,171,822
2	United States of America	816,167
3	Poland	777,071
4	Italy	732,794
5	Chile	678,629

Source: Food and Agriculture Organization of the United Nations, www.faostat.fao.org, accessed February 17, 2012.



Consumer Trends

Over the past few years, as Canadians have become more educated on the benefits of eating fresh fruit as a part of a healthy diet, fresh apple consumption has increased slightly. According to Statistics Canada, in 2009, the quantity of fresh apples available for consumption in Canada reached 12.08 kilograms per person, representing a 10% increase over the past five years. Consumption of processed apple products such as applesauce, apple pie filling and canned apples has been relatively stable over the past five years, with 1.02 kilograms per person reported in 2009, while apple juice consumption, at 7.23 litres per person in 2009, has also remained relatively unchanged (Table 12).

Table 12 – Apple Quantities Available for Consumption^{6,7,8}

Type	2005	2006	2007	2008	2009
Fresh	Kilograms per person				
	10.95	11.33	10.9	11.16	12.08
Processed	Kilograms per person				
	1.05	1.11	1.11	1.15	1.02
Juice	Litres per person				
	7.18	7.13	7.05	6.96	7.23

Source: Statistics Canada (21-020-X – Food Statistics)

Canadian consumers are increasingly moving towards convenience products when buying fruit at the grocery store. Pre-washed, pre-sliced or bagged fruit are items that appeal to today's apple consumers. The United States Department of Agriculture has even highlighted a Canadian trend of an increase of purchases of bags of 12 to 15 apples.⁹ Sliced apples packaged in individual portions are becoming more and more popular, and can be a good way for producers to add value to the fruit.

Consumers are also moving to new varieties of apples. Honeycrisp and Ambrosia are among the most popular new varieties in Canada and command a premium compared to other more traditional varieties. Varieties like Gala and Fuji are becoming increasingly popular with consumers, while older varieties like Red Delicious are losing market share. McIntosh is still popular with consumers, notably for its continued use in juices.

⁶ For fresh and processed - Does not adjust for losses, such as waste and/or spoilage, in stores, households, private institutions or restaurants or losses during preparation.

⁷ For fresh and processed - In retail weight unless otherwise specified.

⁸ For juice - Experimental, use with caution. The data have been adjusted for retail, household, cooking and plate loss.

⁹ Government of Alberta, Agriculture and Rural Development. *Consumer Trends for Fruit and Vegetable Products*. [http://www1.agric.gov.ab.ca/\\$department/deptdocs.nsf/all/sis8439](http://www1.agric.gov.ab.ca/$department/deptdocs.nsf/all/sis8439), accessed June 6, 2011.



Industry Challenges and Opportunities

Canadian apple growers are facing some unique challenges and continue to operate in an increasingly competitive environment. Marketplace pressures include world oversupply, retailer consolidation, the rising value of the Canadian currency and greater foreign competition in both domestic and export markets. In addition, apple growers, like many other farmers, are at the mercy of Mother Nature and have to deal with weather phenomena like hail and drought, as well as pests and diseases.

Imports are a major challenge for locally grown Canadian apples. The rising Canadian dollar has made American apples cheaper for wholesalers to purchase, despite the greater shipment distances. Capitalizing on the growing consumer trend to “buy local” and promoting the Canada brand could potentially help Canadian apple growers regain some of their lost market share on the domestic market.

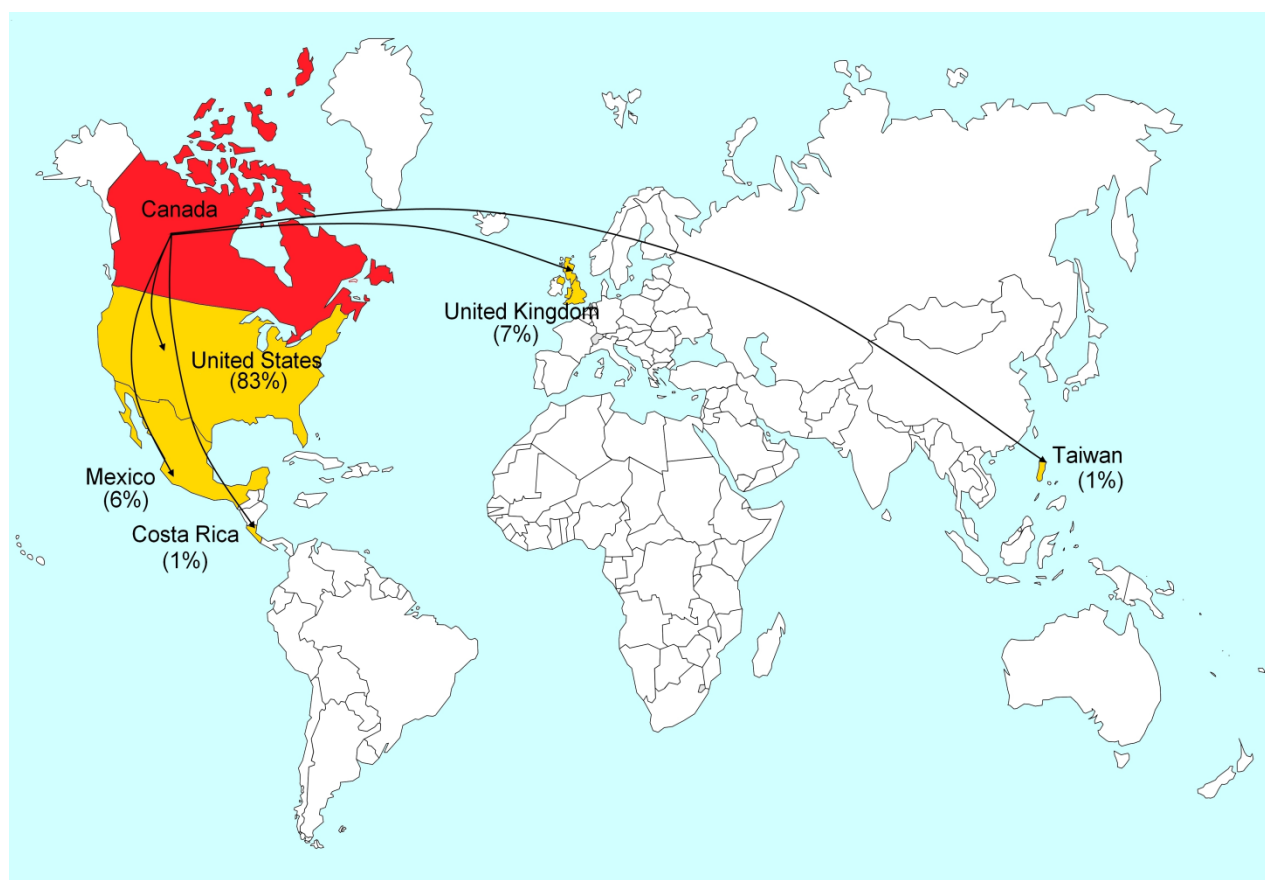
The shift to new varieties of apples opens up new opportunities. As seen in the example of Honeycrisp and Ambrosia, new varieties become popular with consumers who are keen to try them, and can be sold at a premium. Value-added products like apple slices, frozen apple products and apple snacks all represent opportunities that respond to consumer demand for quick and convenient healthy foods.

Research and development is also very important in the apple industry’s efforts to innovate by developing new varieties that appeal more to consumers, bruise less, taste and look better and are disease resistant.



Maps

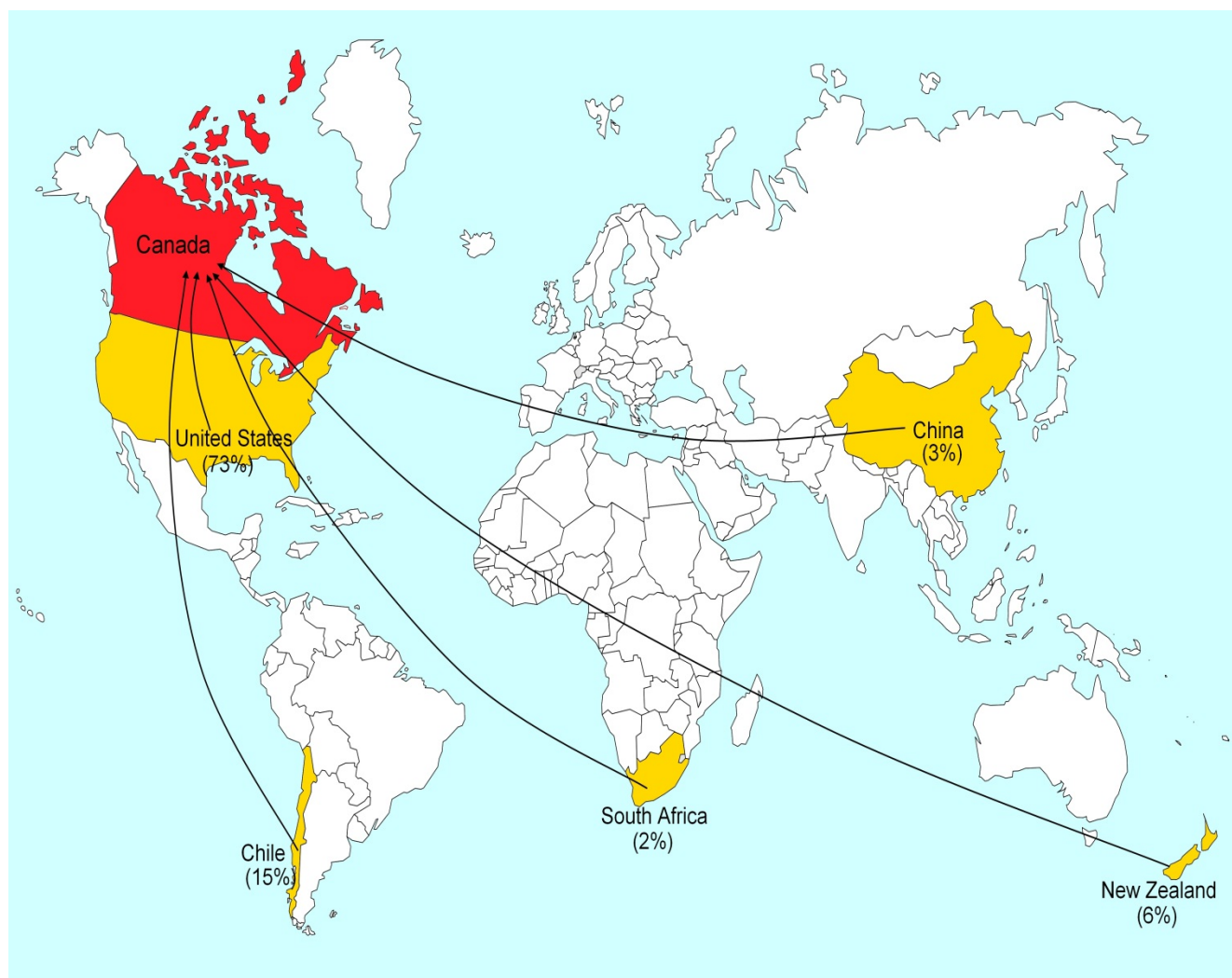
Figure 5 – Canada's Top 5 Apple Export Destinations in 2010



Source: Statistics Canada (Catsnet - June 6, 2011)



Figure 6 – Canada's Top 5 Apple Import Sources in 2010



Source: Statistics Canada (Catsnet - June 6, 2011)



Key Resources

Statistics Canada. Publication 22-003-X "Fruit and Vegetable Production".

Statistics Canada. 2006 Census of Agriculture, Farm data and farm operator data, Publication 95-629-XWE.

Statistics Canada. Publication 21-020-X "Food Statistics".

Statistics Canada CATS database. Canadian Export and Import Data.

FAO Stat (July 2011).

Import and export data is based on the following Harmonized System Codes (H.S. Codes):

Imports: 0808101000, 0808101010, 0808101011, 0808101012, 0808101013, 0808101014, 0808101015, 0808101016, 0808101017, 0808101019, 0808101020, 0808101030, 0808101040, 0808101050, 0808101060, 0808101070, 0808101081, 0808101082, 0808101083, 0808101084, 0808101089, 0808101090, 0808101091, 0808101092, 0808101093, 0808101094, 0808101095, 0808101096, 0808101097, 0808101099, 0808109000.

Exports: 08081000, 08081010, 08081090.