



Industry Outlook & Global Crop Report

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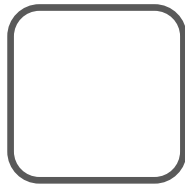
Vice President, Insights & Analytics

08.15.24

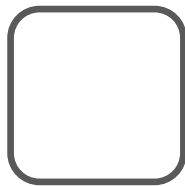
USApple Outlook Poll: Final Questions

AGREE

DISAGREE

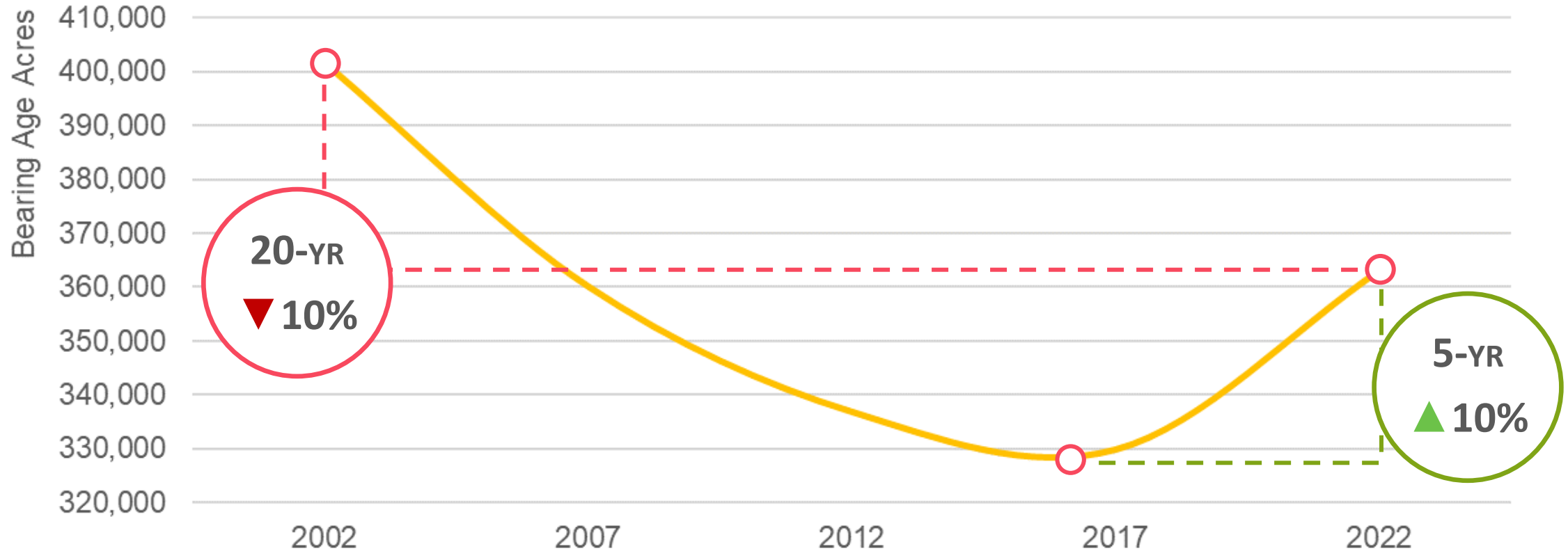


*Bearing acreage for U.S. apple orchards is
DOWN 10% in the **last 20 years.***



*Bearing acreage for U.S. apple orchards is
UP 10% in the **last 5 years.***

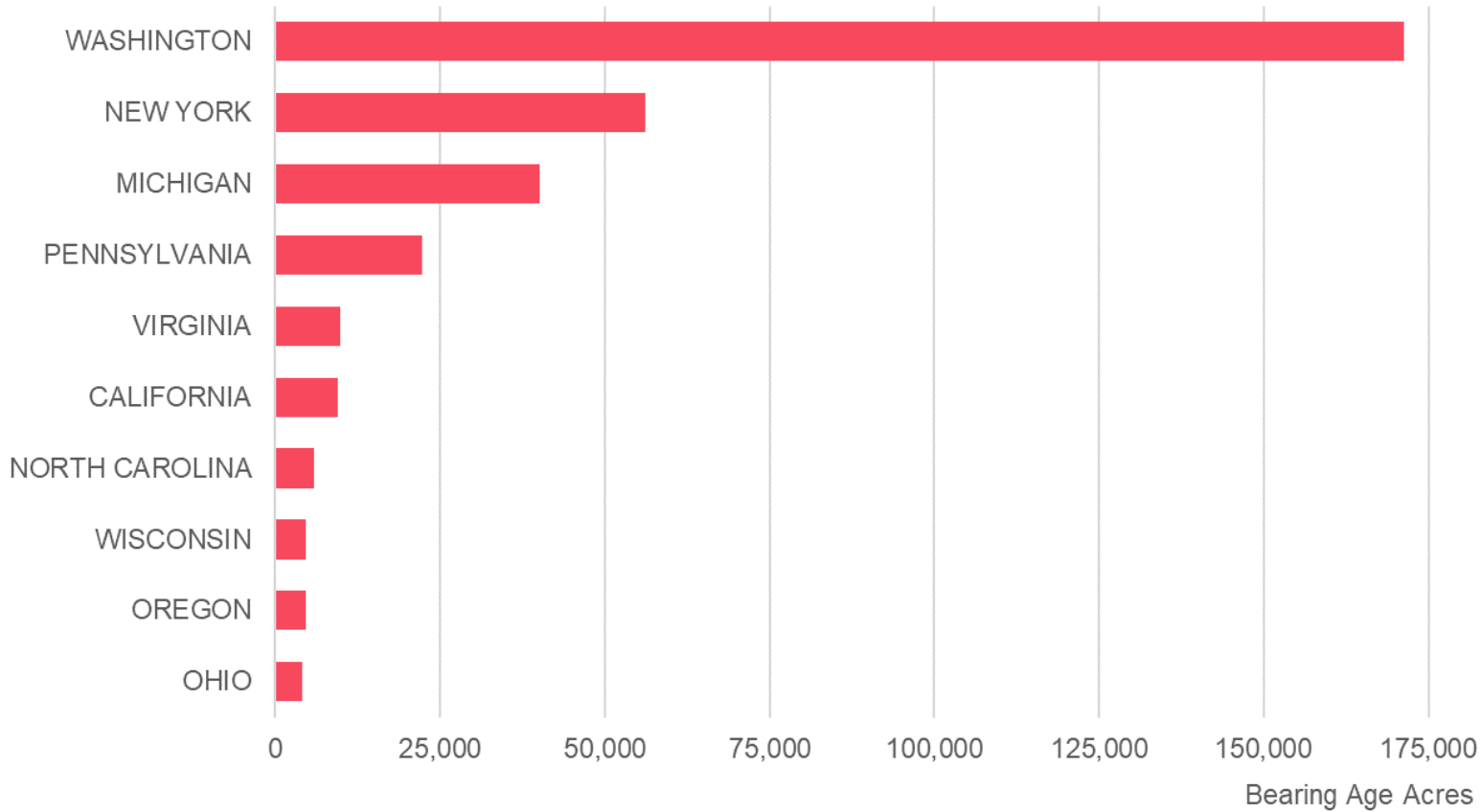
U.S. Apple Acreage: Bearing Age



Sources: USDA, Ag Census; USApple

Where the apple industry grows together

U.S. Apple Acreage: 2022 Levels



Sources: USDA, Ag Census; USApple

Bearing Age Acres: Top 10

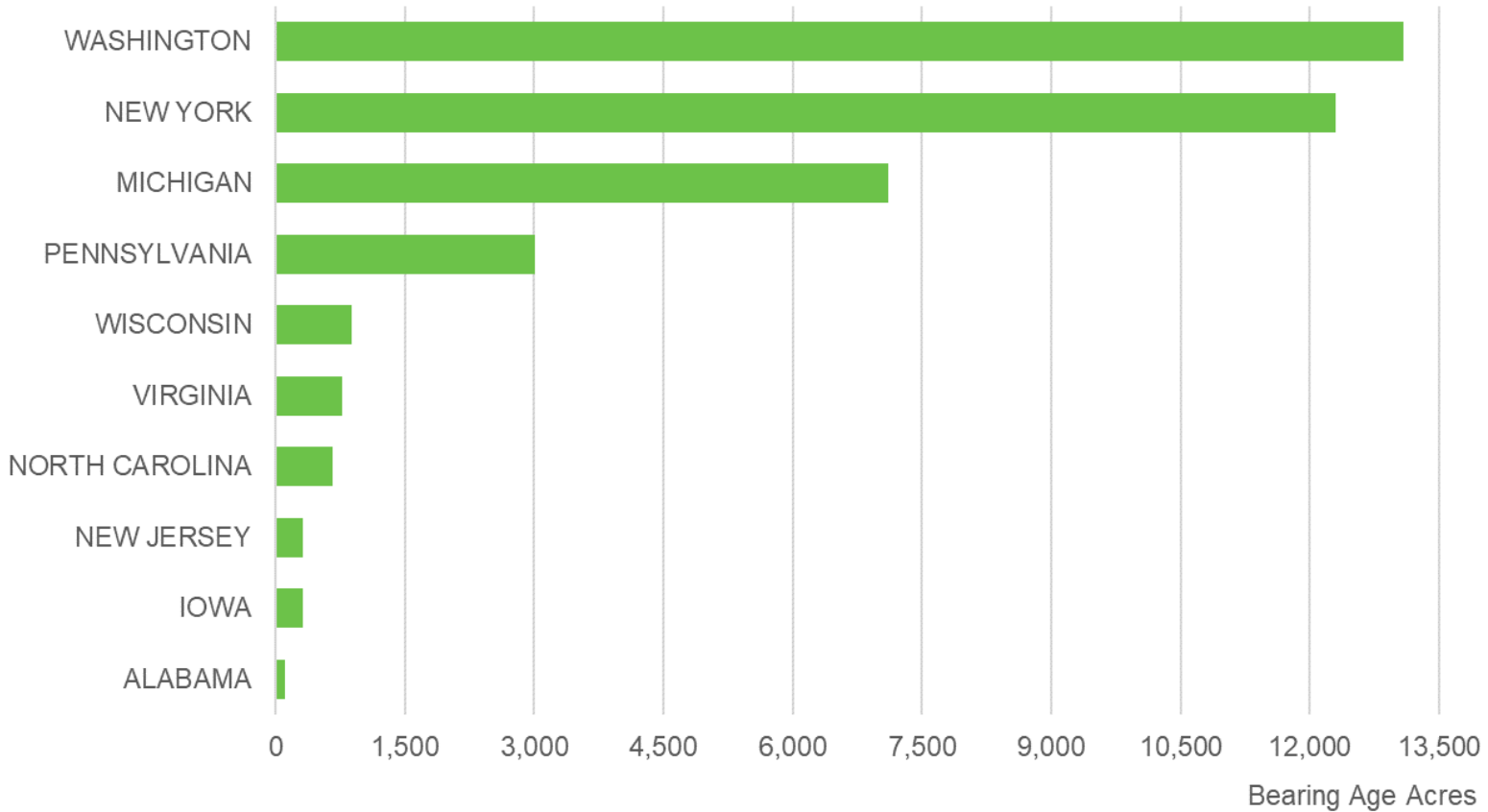
WASHINGTON	171,373
NEW YORK	56,086
MICHIGAN	40,051
PENNSYLVANIA	22,303
VIRGINIA	9,825
CALIFORNIA	9,471
NORTH CAROLINA	5,877
WISCONSIN	4,655
OREGON	4,560
OHIO	3,986

U.S. Total

363,098

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U.S. Apple Acreage: 5-Year Growth



Sources: USDA, Ag Census; USApple

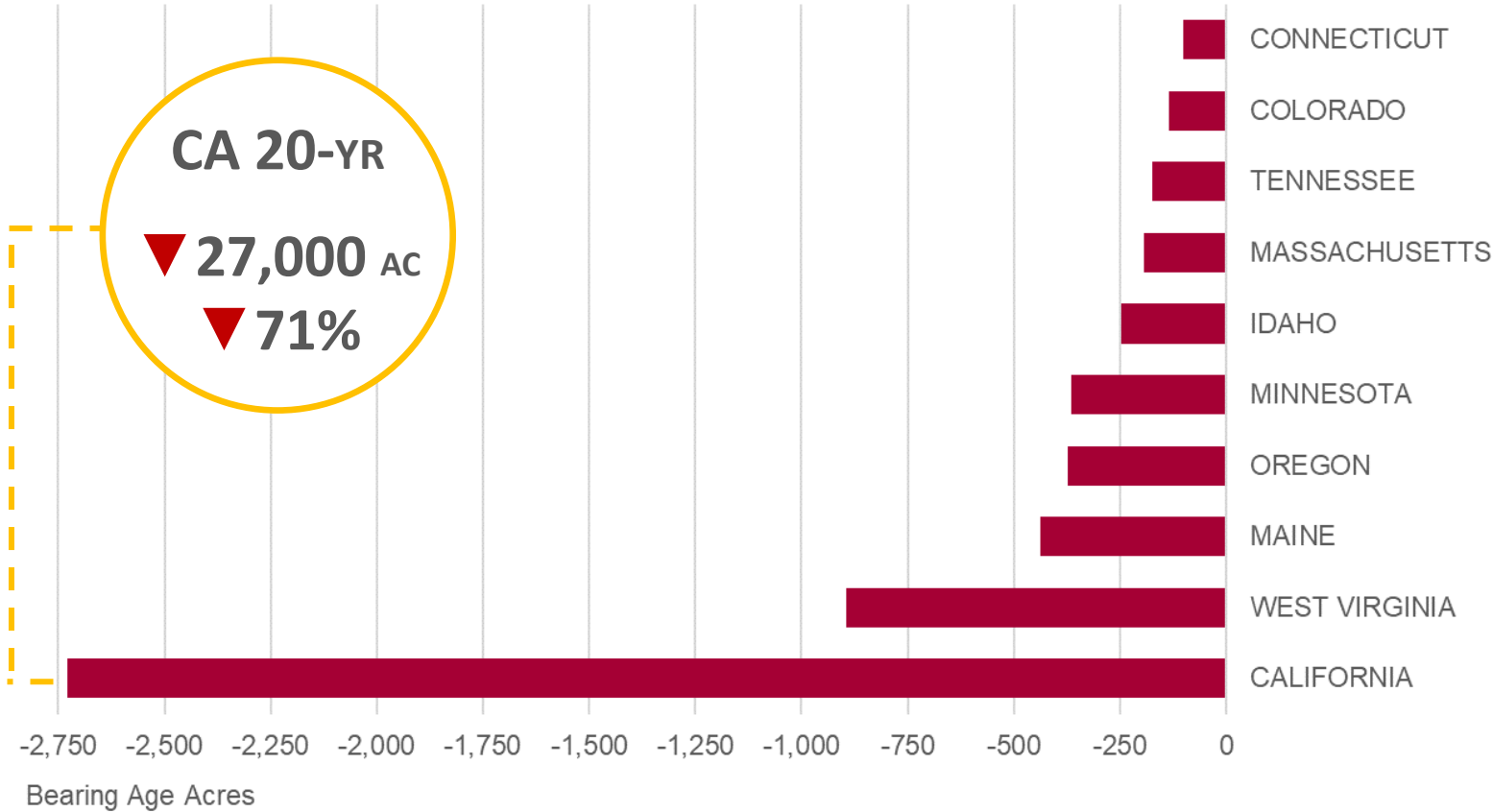
Bearing Acre Growth: Top 10

WASHINGTON	13,082
NEW YORK	12,297
MICHIGAN	7,110
PENNSYLVANIA	3,006
WISCONSIN	884
VIRGINIA	770
NORTH CAROLINA	663
NEW JERSEY	324
IOWA	311
ALABAMA	116

U.S. Net Gain 33,166

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U.S. Apple Acreage: 5-Year Decline



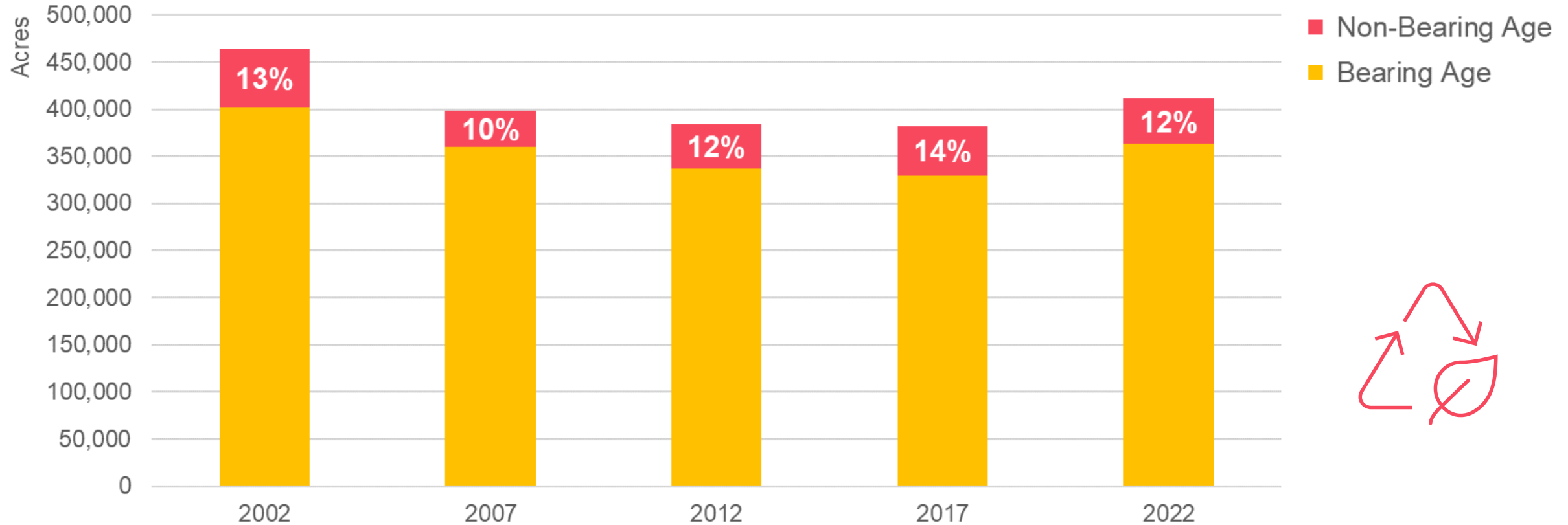
Bearing Acre Loss: Top 10

CALIFORNIA	2,729
WEST VIRGINIA	894
MAINE	438
OREGON	374
MINNESOTA	364
IDAHO	247
MASSACHUSETTS	193
TENNESSEE	175
COLORADO	133
CONNECTICUT	101

Sources: USDA, Ag Census; USApple

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U.S. Apple Acreage: Bearing Age / Non-Bearing Age



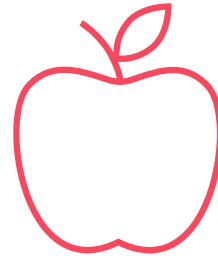
Sources: USDA, Ag Census; USApple



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U.S. Fresh Apple Utilization / Acreage “Re-Fresh”

U.S. 5-YR
Averages



Fresh
67%



Processing
30%

** remaining “not sold”*

% FRESH



21%



51%

▲ **4% YOY**



52%



55%

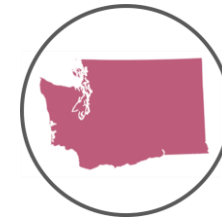
▲ **5% YOY**



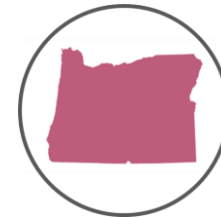
57%

▲ **10% YOY**

▲ **16% YO5Y**



77%

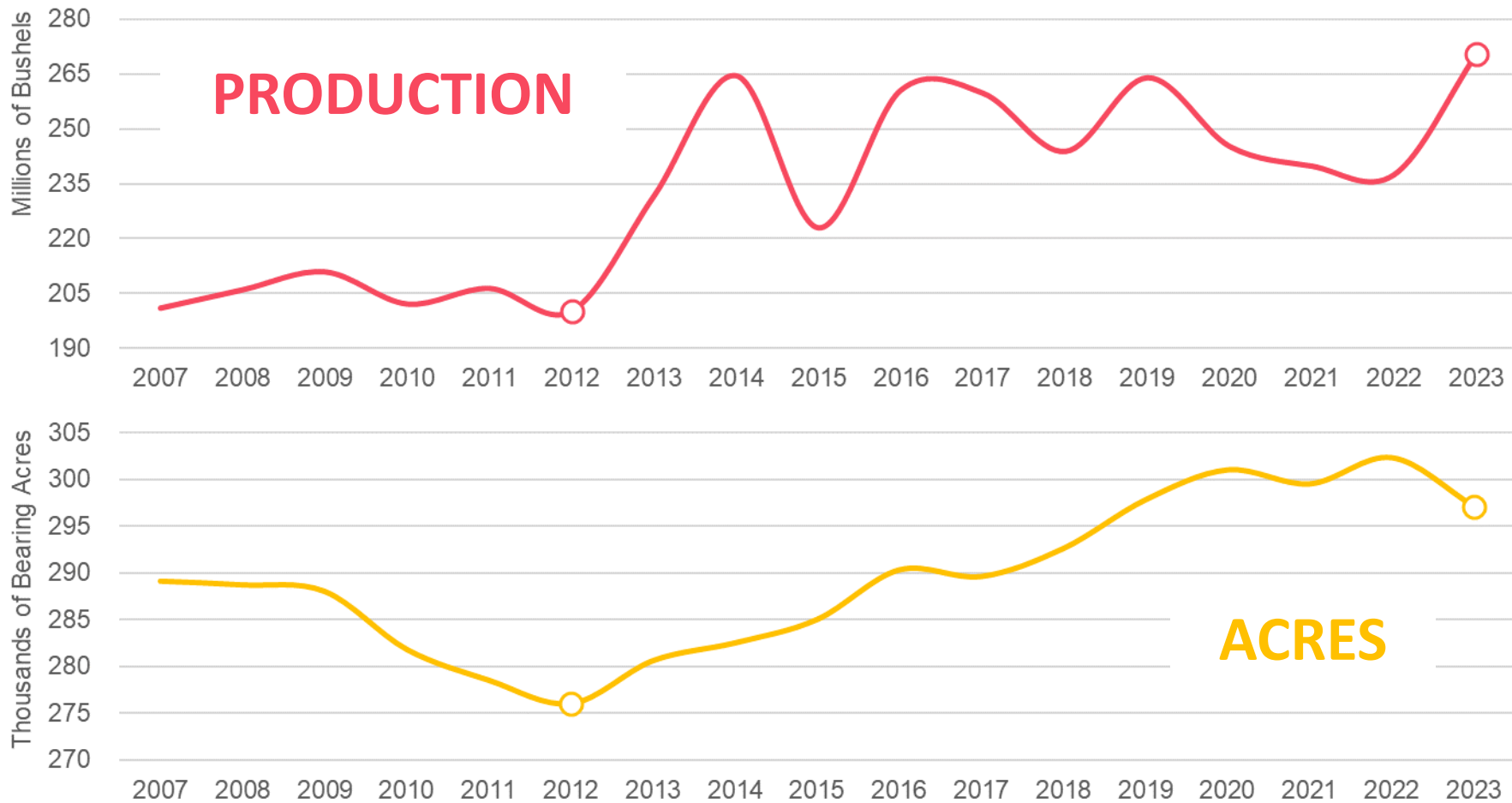


88%

▲ **9% YO5Y**

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U.S. Apple Yield: Top 7 Apple States



2012 - 2023

BU ▲ 35%

AC ▲ 8%

BU / AC ▲ 25%

2012: 725 BU/AC

2023: 910 BU/AC

Sources: USDA, NASS; USApple

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U.S. Fresh Apple Packouts

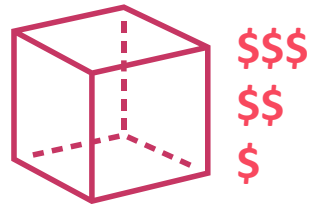
GOOD FRUIT
GROWER

Apple industry feeling the squeeze from economic pressures
With prices down and costs up, apple industry looks at strategies for weathering the downturn.

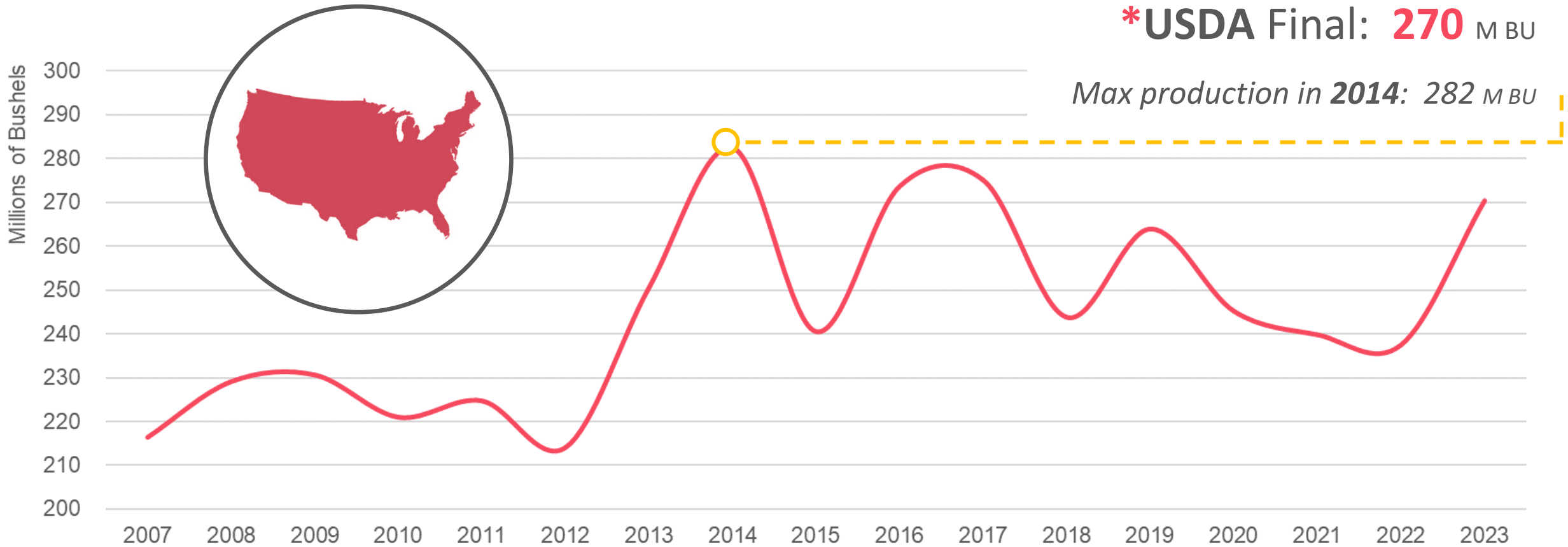
Jared Johnson, Kate Prengaman, TJ Mullinax // February 6, 2024



“We had a phenomenal growing year, and you’ve grown some fantastic apples,” Baldwin said.
“Packouts are up anywhere from three to six packs per bin.”



U.S. Apple Production: Total 2023/24



*USDA Final: **270** M BU

Max production in **2014**: 282 M BU

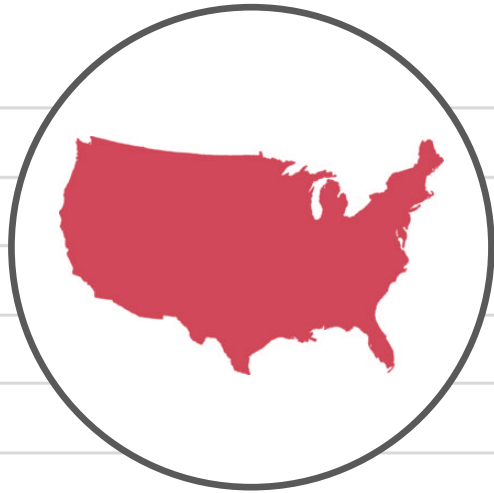
Sources: USDA, NASS; USApple

— USDA Estimate

*USDA AUG 2023 Est.: 236 M BU

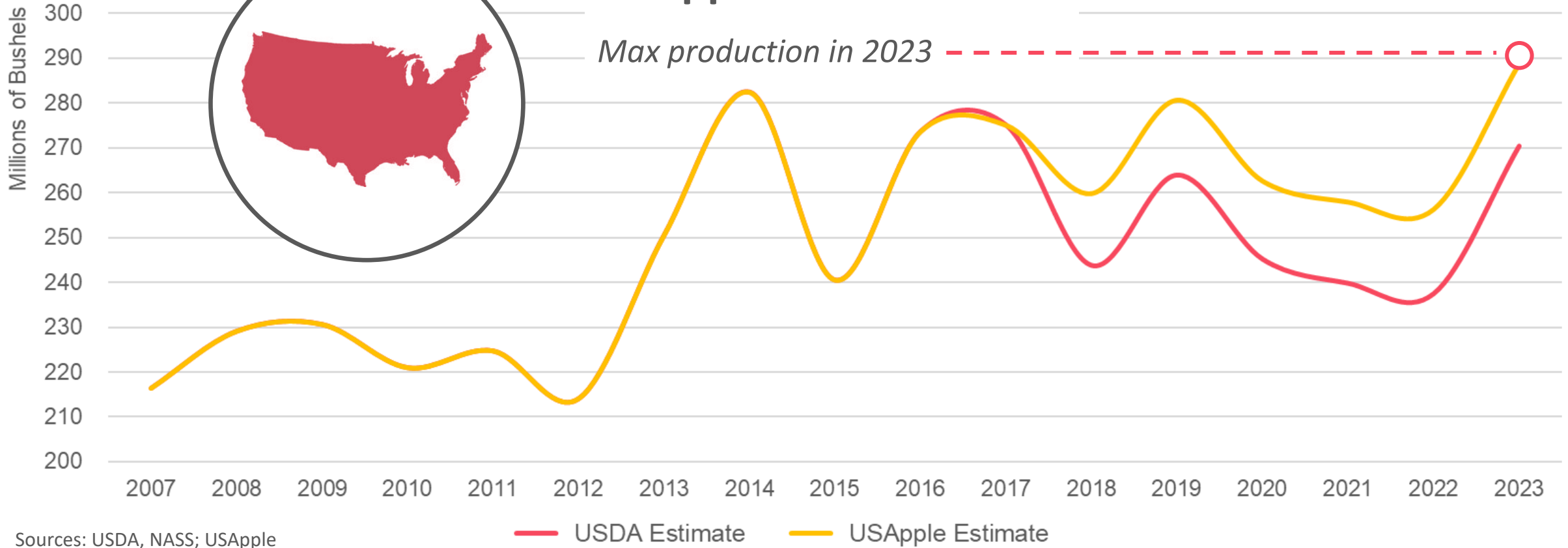
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U.S. Apple Production: Total 2023/24



USApple Final: **289** M BU

Max production in 2023



Sources: USDA, NASS; USApple

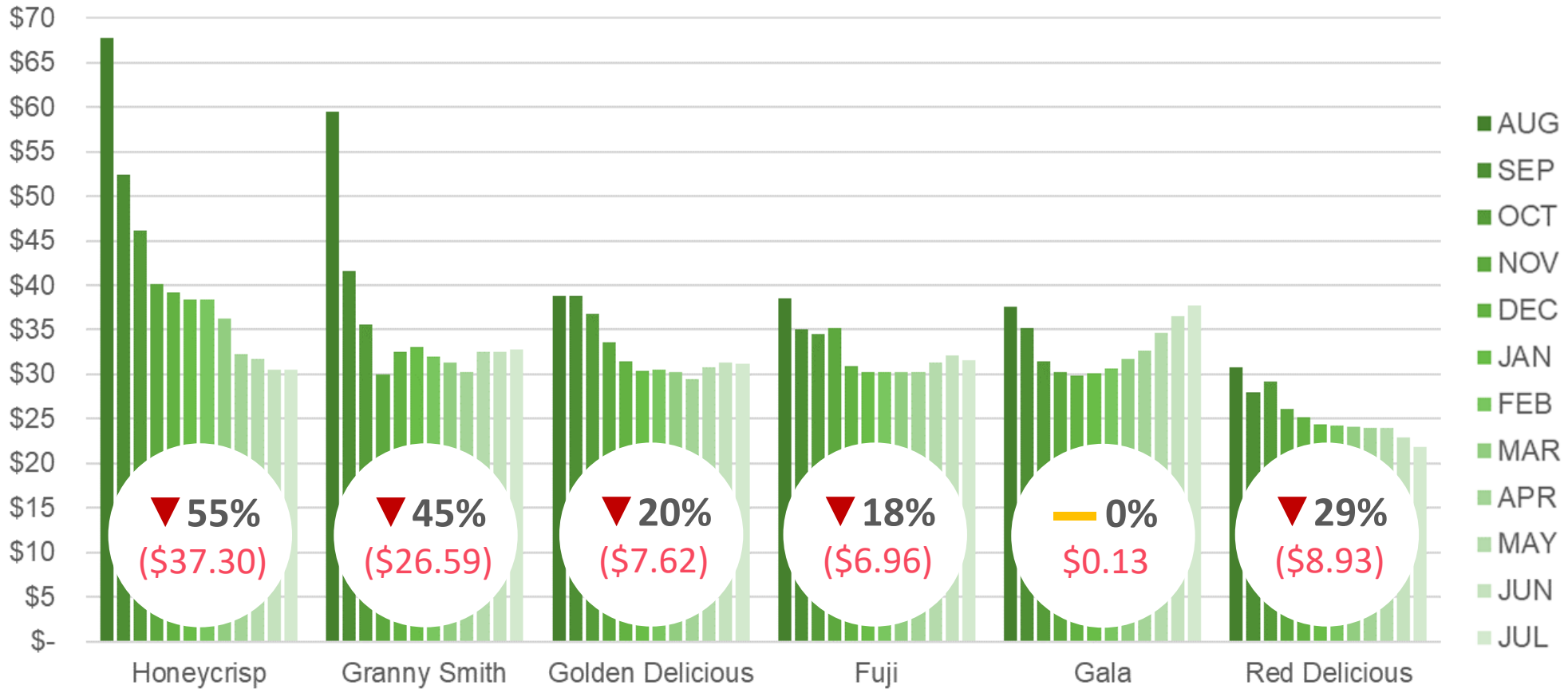
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U.S. Apple Prices: CPI



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U.S. Apple Prices: Shipping-Point

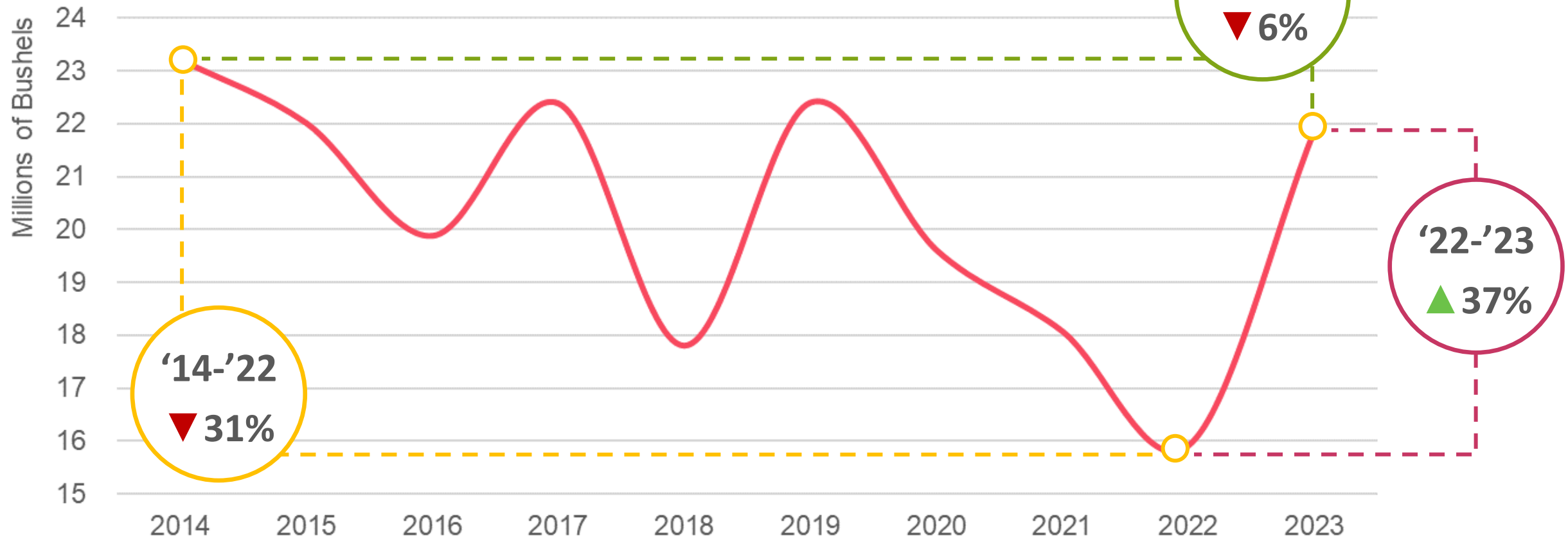


- ✓ 2023/24 Season
- ✓ Cartons Tray Pack
- ✓ All Item Sizes
- ✓ All Grades
- ✓ All Domestic & Export Sales

Sources: USDA, AMS; USApple

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U.S. Fresh Apple Exports



Sources: USDA, FAS; USApple

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U.S. Fresh Apple Exports*

1. Mexico: **17.3 M BU**
37% share | ▲ 38%



2. Canada: **7.4 M BU**
16% share | ▼ 2%



2022/23
JUL-JUN
58,000 BU

- 3. Taiwan **3.8 M BU** 8% share | ▲ 94%
- 4. Vietnam **2.6 M BU** 6% share | ▲ 23%
- 5. India **2.3 M BU** 5% share | ▲ 3827%
- 6. Dom. Rep. **1.3 M BU** 3% share | ▲ 18%
- 7. Guatemala **1.3 M BU** 3% share | ▲ 138%
- 8. Columbia **1.1 M BU** 2% share | ▲ 225%
- 9. Hong Kong **936,000 BU** 2% share | ▲ 54%
- 10. Thailand **835,000 BU** 2% share | ▲ 57%

Sources: USDA, FAS; USApple

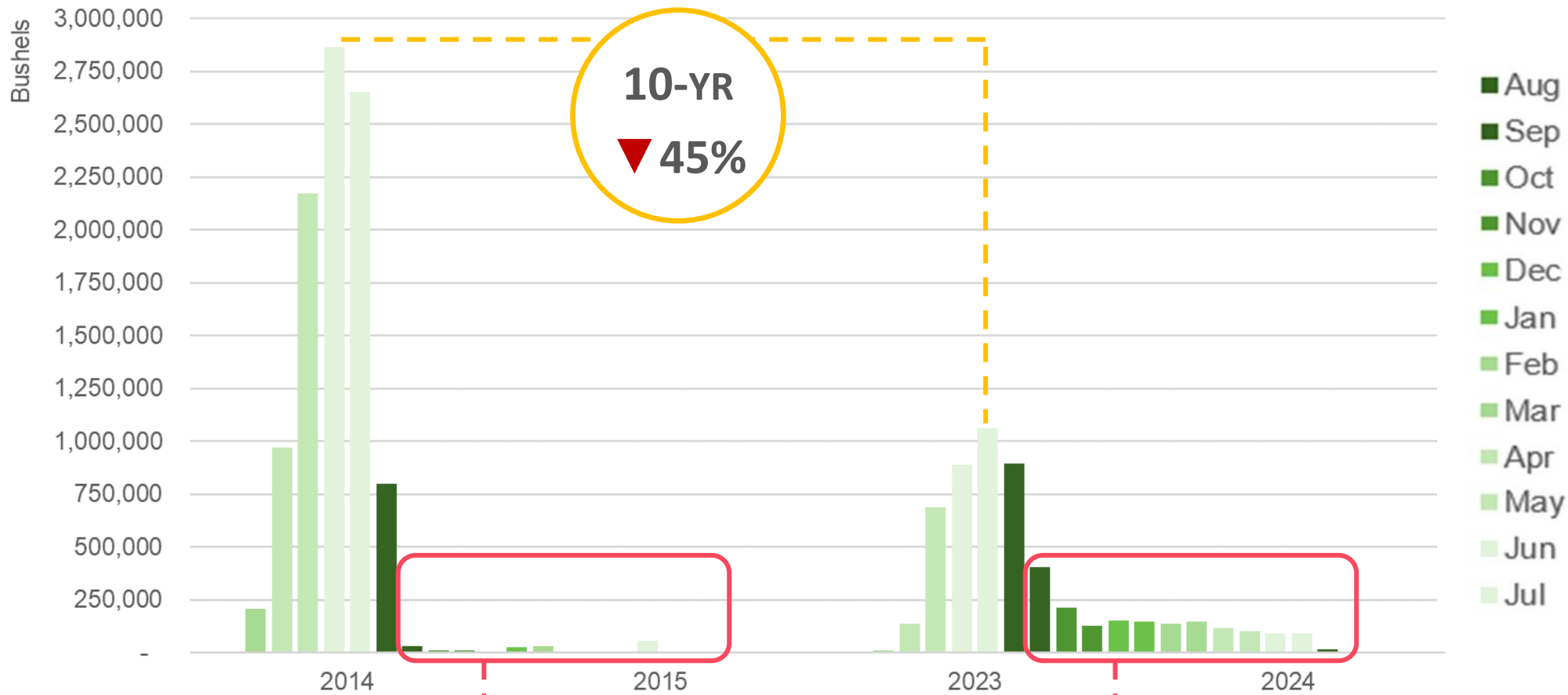
More sales don't necessarily mean more profit ...

Total Exports: \$22.95 per BU
India Exports: \$18.41 per BU ▼ 20%

* July 2023 – June 2024

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U.S. Fresh Apple Imports



“Sticky” Imports

A decade ago, post-August imports were **2%** of total.

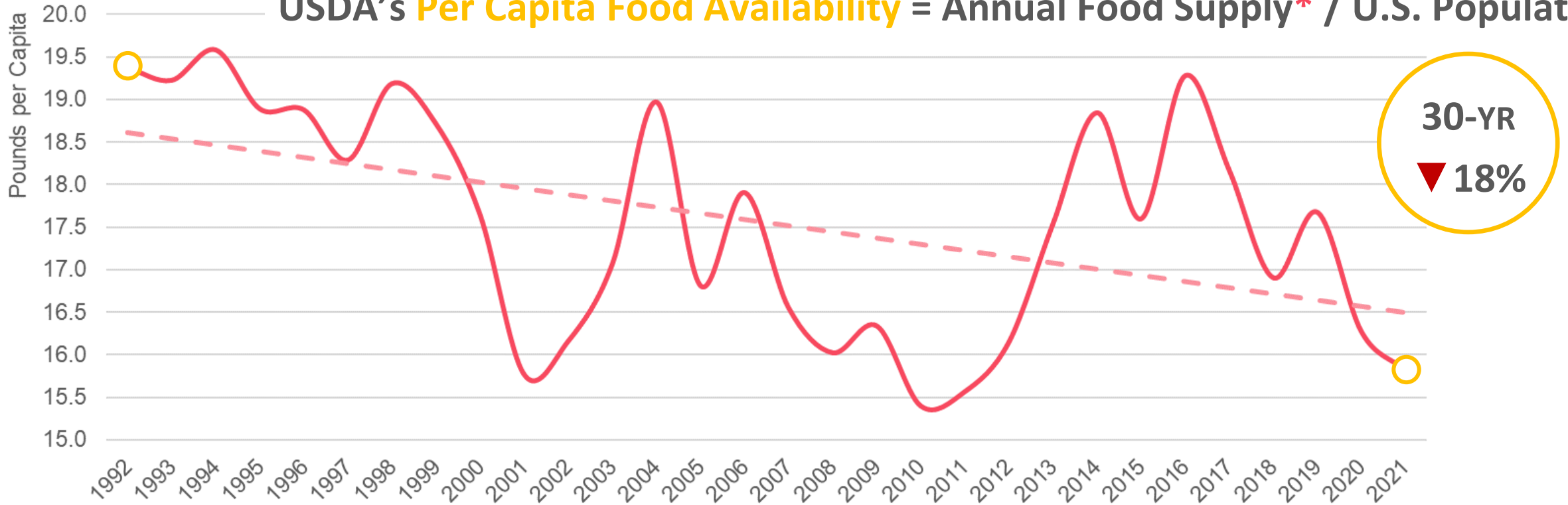
In 2023/24, they accounted for **32%**.

Sources: USDA, AMS; USApple

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U.S. Fresh Apple Consumption

USDA's **Per Capita Food Availability** = Annual Food Supply* / U.S. Population



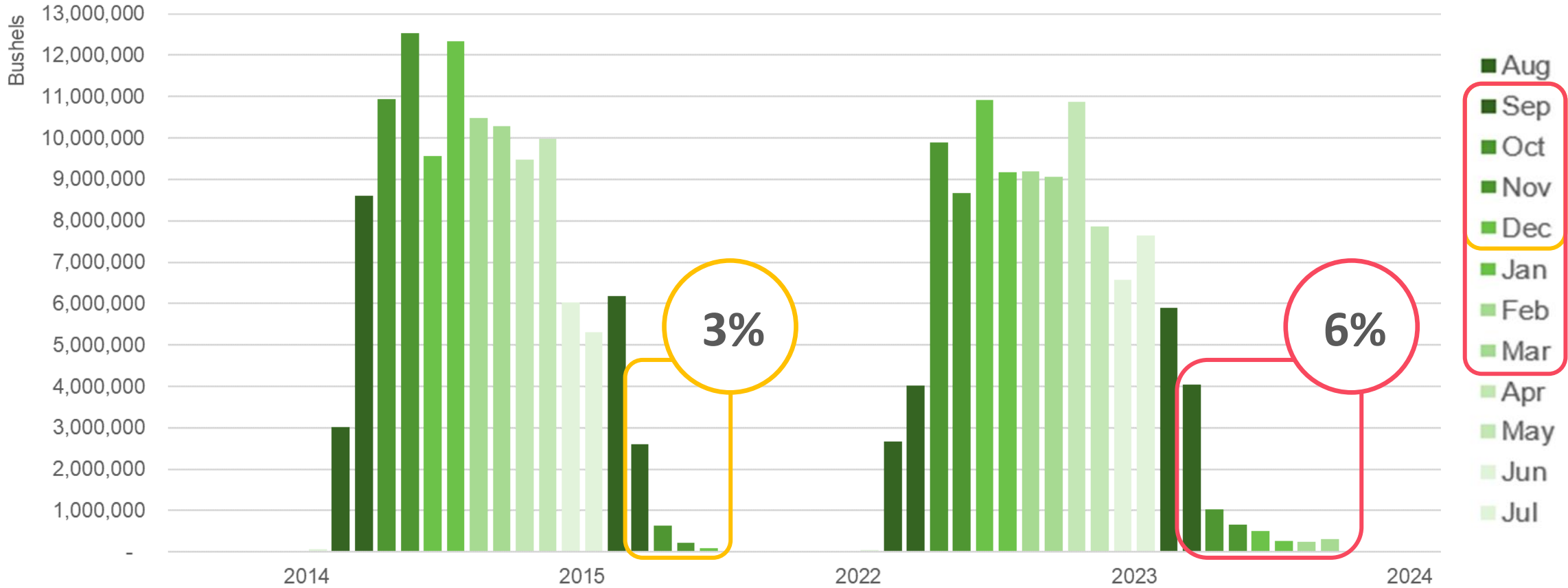
Sources: USDA, ERS; USApple

*Annual Food Supply = (Production + Imports + Beginning Stocks) – (Exports + Ending Stocks)

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U.S. Fresh Apple Movement*

Competition from last season's apples ...
 WSTFA: AUG '24 holdings ▲ 28% yoy



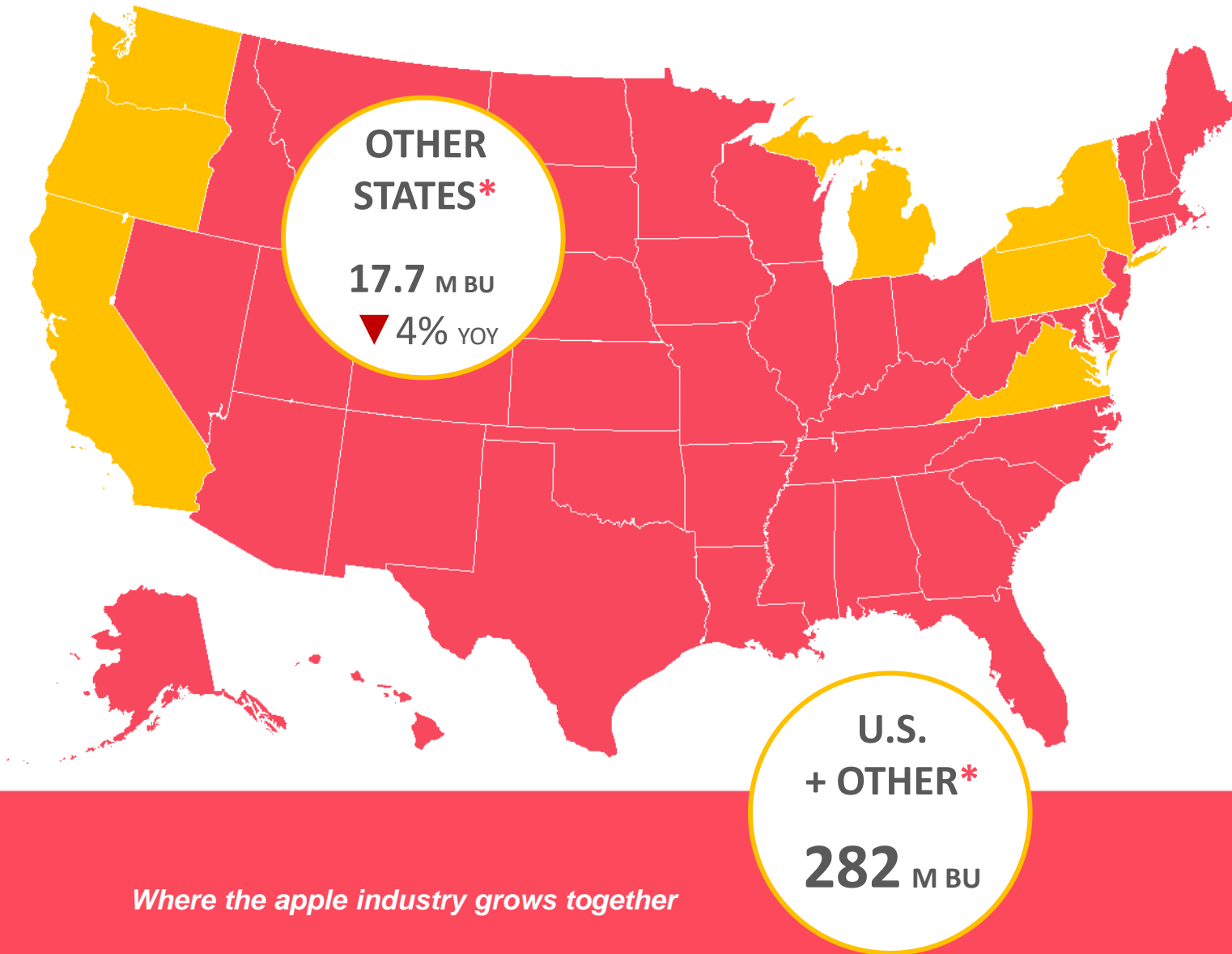
Sources: USDA, AMS; USApple

* Domestic movement only

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U.S. Apple Production: USDA 2024/25 (F)



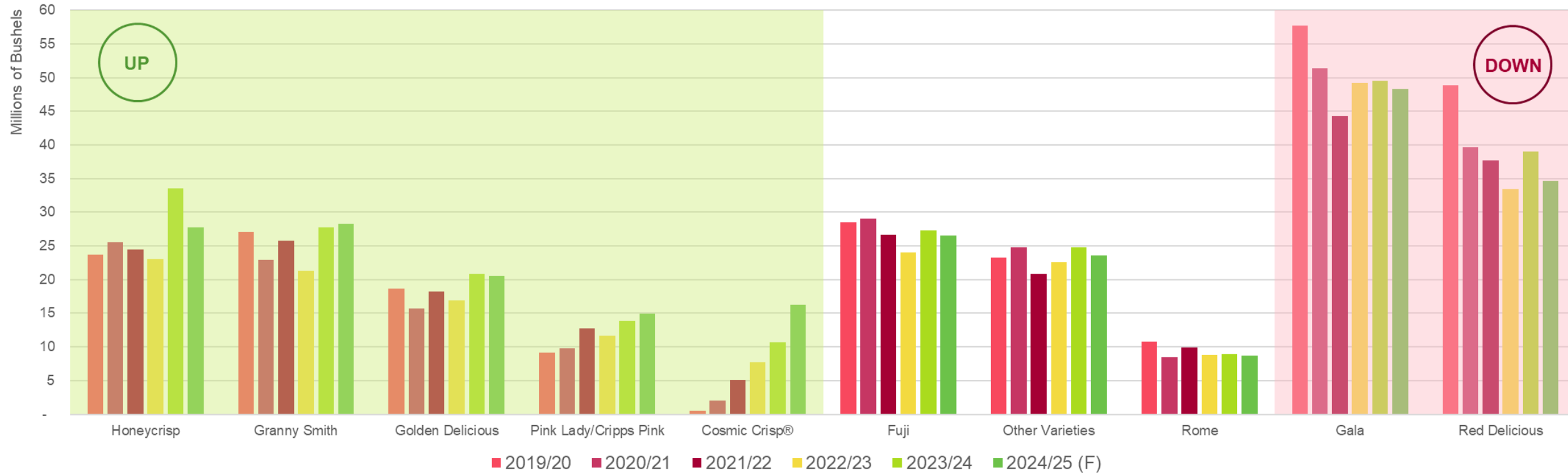
➤ CALIFORNIA	5.5 M BU	▼ 4% YOY
➤ MICHIGAN	28.6 M BU	▼ 10% YOY
➤ NEW YORK	31.0 M BU	▲ 4% YOY
➤ OREGON	3.6 M BU	▼ 5% YOY
➤ PENNSYLVANIA	12.1 M BU	▼ 8% YOY
➤ VIRGINIA	5.2 M BU	▲ 4% YOY
➤ WASHINGTON	179 M BU	▼ 1% YOY
<hr/>		
➤ UNITED STATES	265 M BU	▼ 2% YOY

Sources: USDA, NASS; USApple

* USApple Estimate

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U.S. Apple Production: USDA 2024/25 (F)



Sources: USApple; CAC; WSTFA

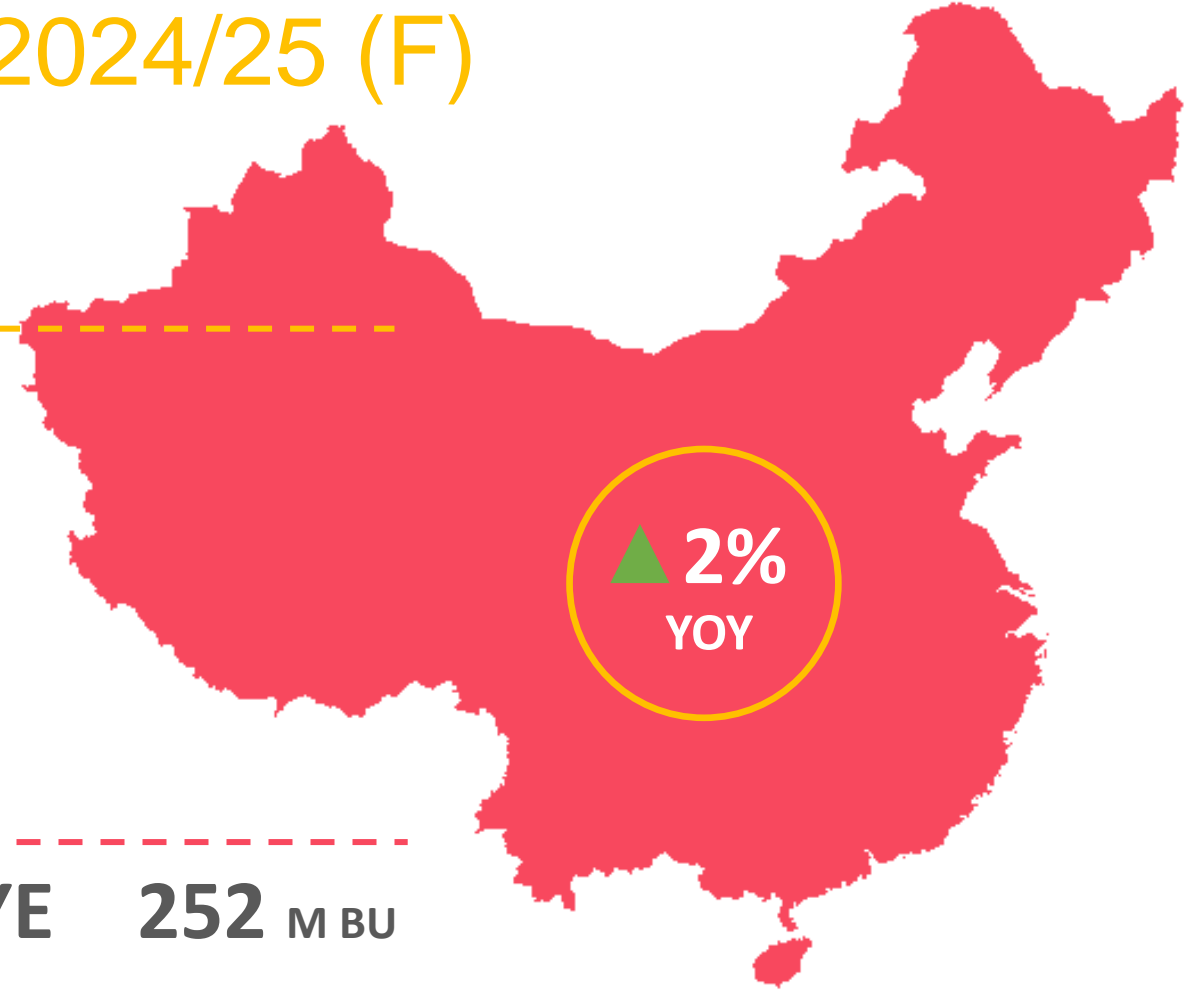
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Global Apple Production: 2024/25 (F)

CHINA 2,106,000,000 BU



TÜRKIYE 252 M BU

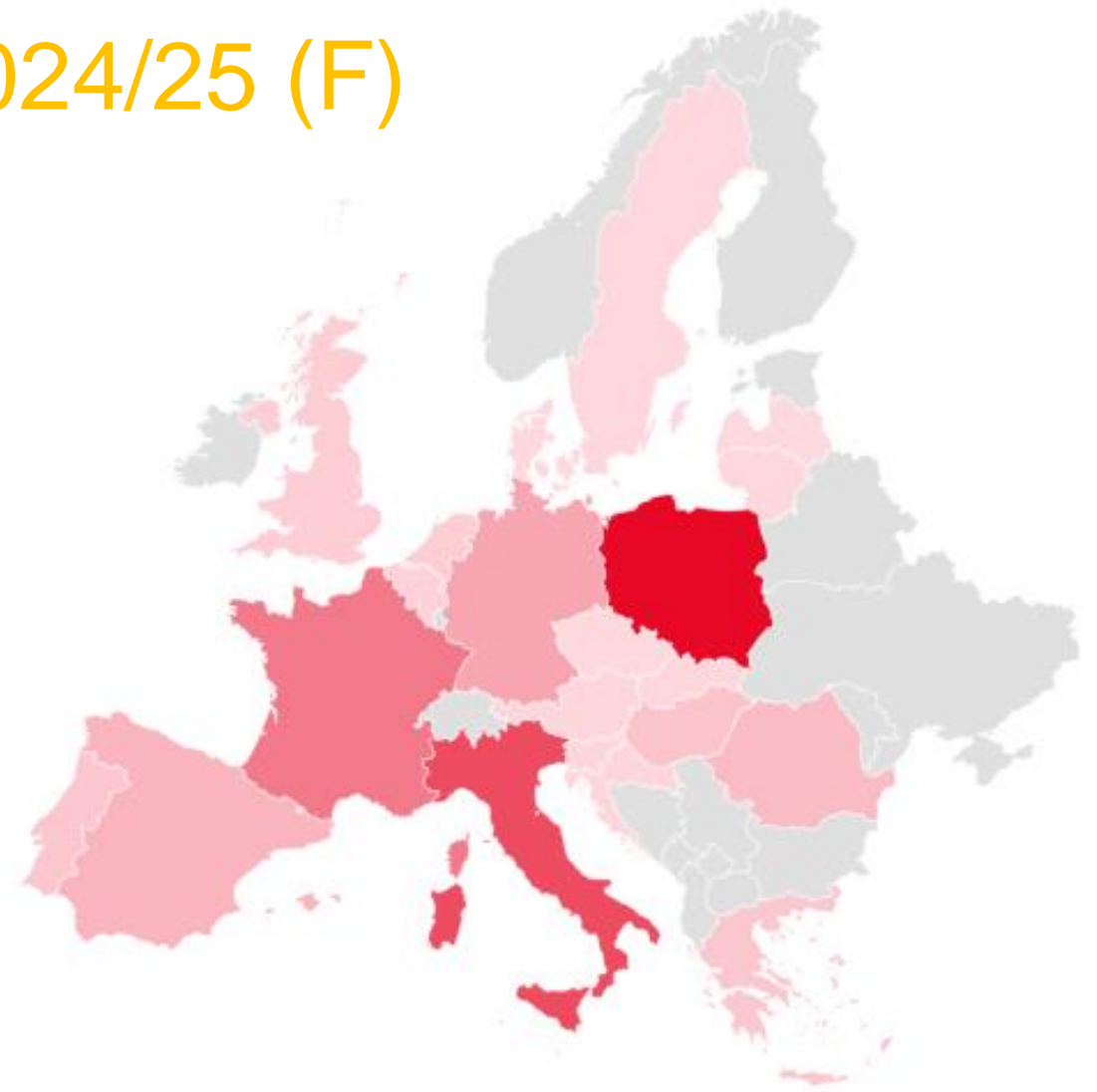


Sources: WAPA; USApple

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Global Apple Production: 2024/25 (F)

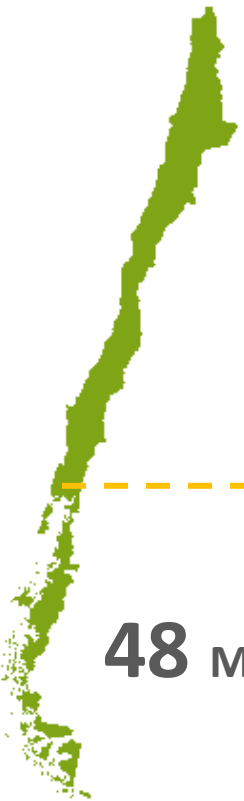
EUROPE	545 M BU	▼ 11% YOY
➤ POLAND	167 M BU	▼ 20% YOY
➤ ITALY	113 M BU	▼ 1% YOY
➤ FRANCE	77 M BU	▼ 3% YOY
➤ GERMANY	42 M BU	▼ 16% YOY
➤ SPAIN	30 M BU	▲ 9% YOY



Sources: WAPA; USApple

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Global Apple Production: 2024/25 (F)



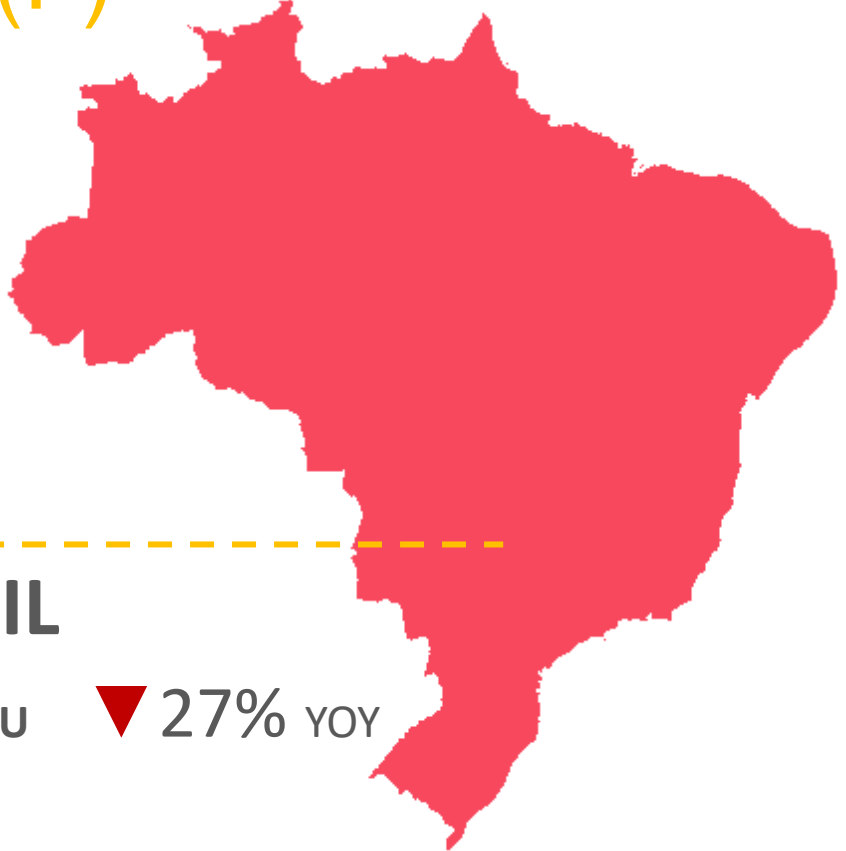
ARGENTINA

26 M BU ▼ 5% YOY



CHILE

48 M BU ▼ 8% YOY

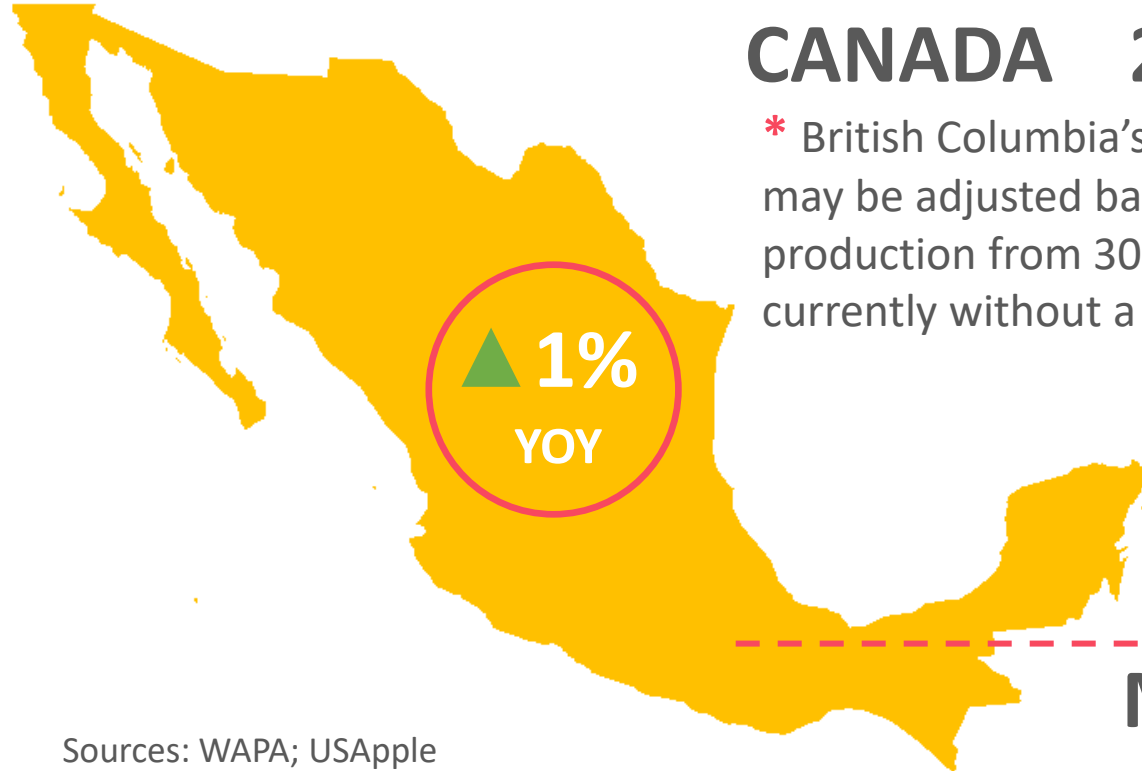


BRAZIL

42 M BU ▼ 27% YOY

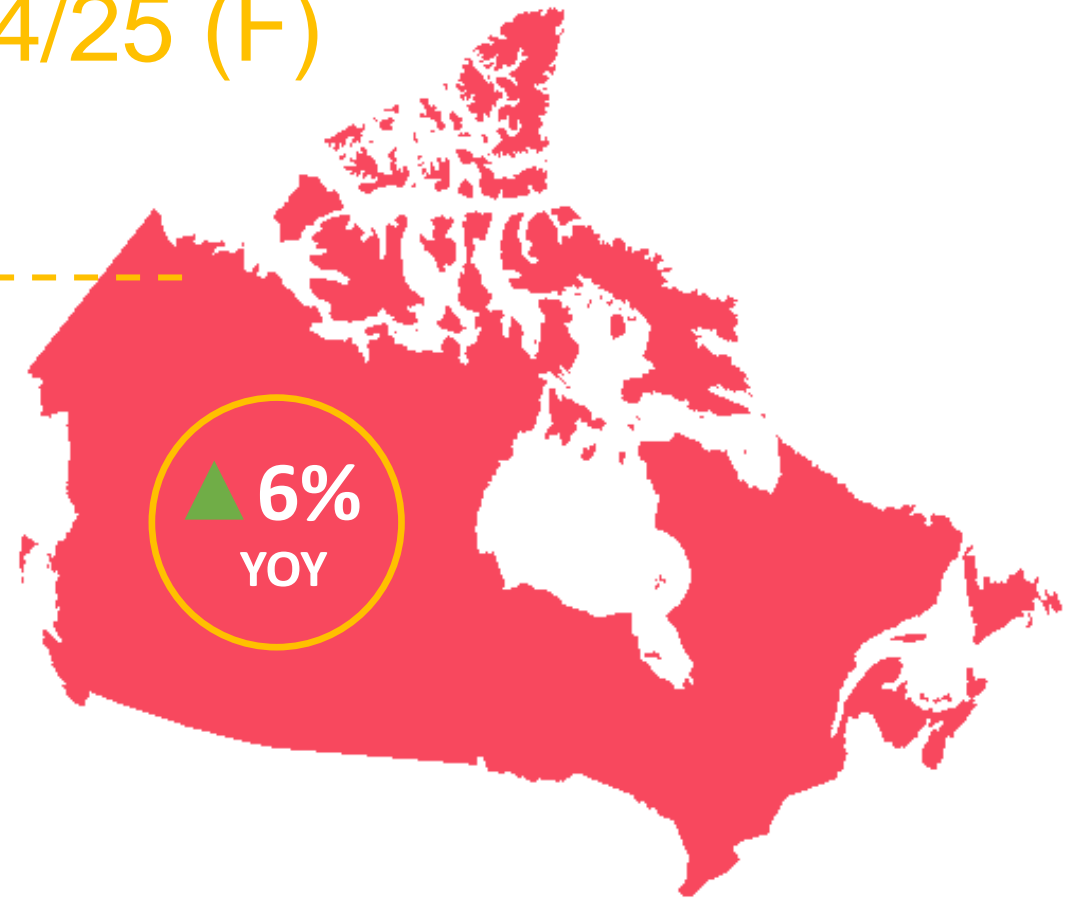
Sources: WAPA; USApple

Global Apple Production: 2024/25 (F)



CANADA 21 M BU

* British Columbia's 3.8 M BU may be adjusted based on production from 300 growers currently without a market.



MEXICO 43 M BU

Sources: WAPA; USApple

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 USApple



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*Better data,
better decisions.*

Christopher Gerlach

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U.S. Apple Association

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 **outlook** **24**