



Uncertainty and Opportunity in the Orchard

August 14, 2025

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USAPPLE OUTLOOK: ATTENDEE POLL



Industry Outlook 2025

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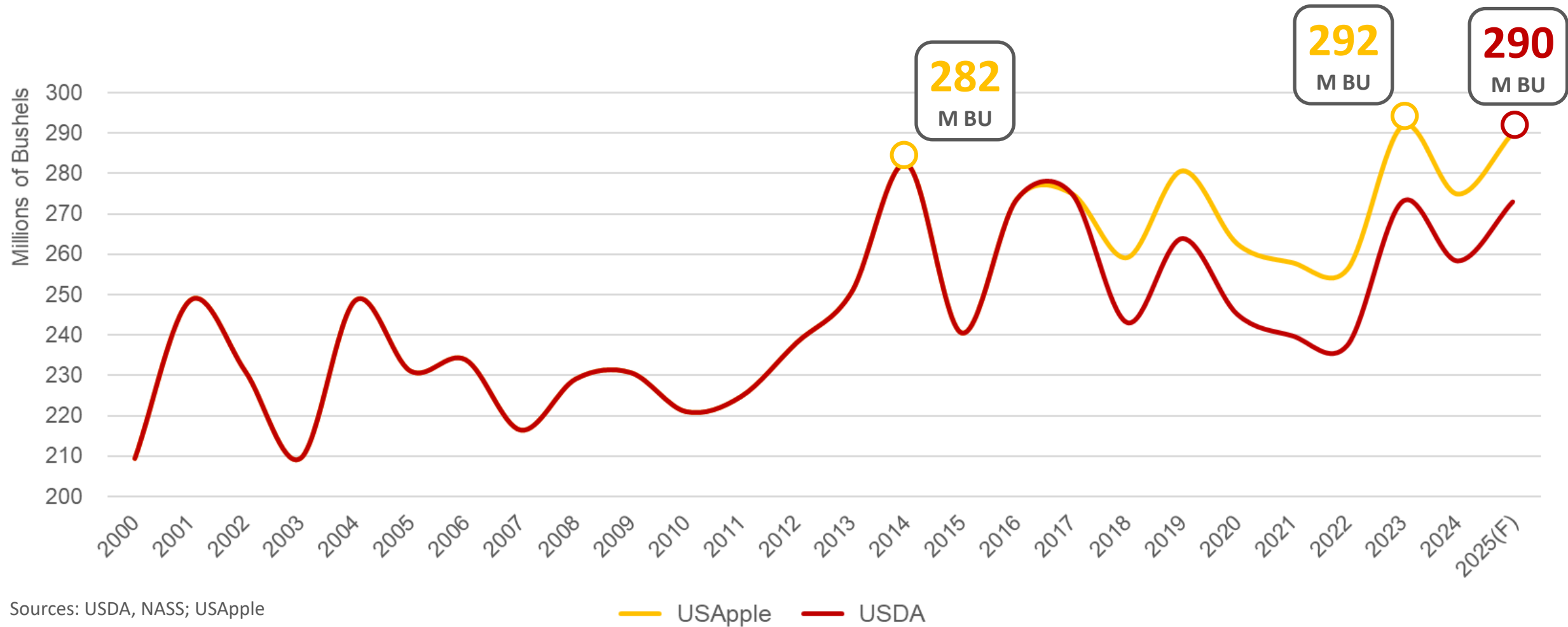
AgroFresh



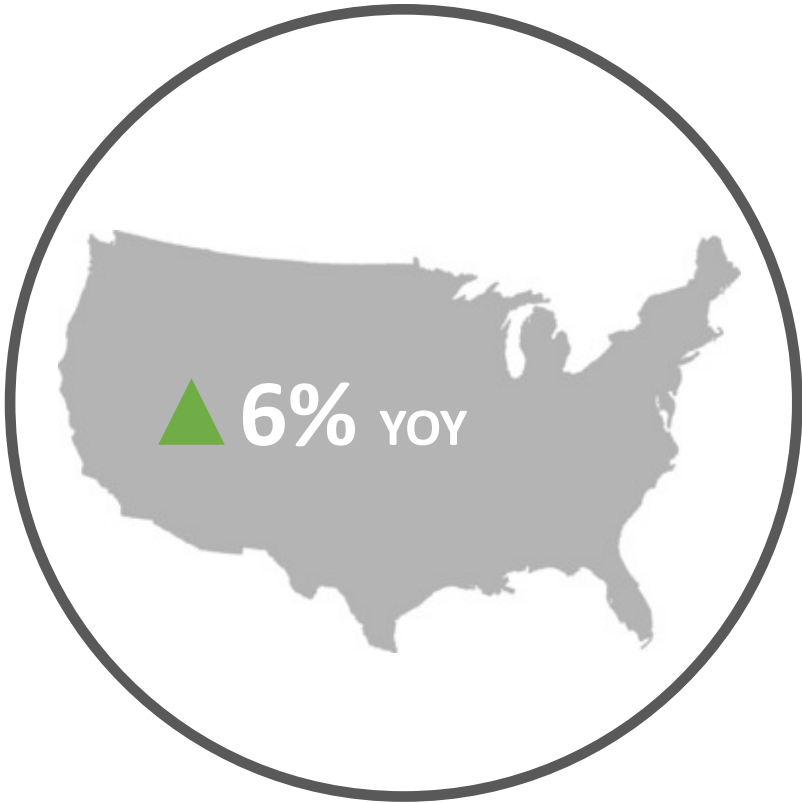
Where the apple industry grows together.

outlook²⁵

U.S. APPLE PRODUCTION: 2025/26 (F)



U.S. APPLE PRODUCTION: 2025/26 (F)



Sources: USDA, NASS; USApple

* includes USApple estimate of Other States

AUG 2025	USDA Estimate*
	Washington
	New York
	Michigan
	Pennsylvania
	Virginia
	Oregon
	California
	Other States

290	M BU	
190	M BU	▲ 7% YOY
35	M BU	▲ 12% YOY
26	M BU	▼ 4% YOY
10	M BU	— 0% YOY
4	M BU	▼ 28% YOY
4	M BU	▲ 38% YOY
4	M BU	▲ 2% YOY
17	M BU	▲ 3% YOY

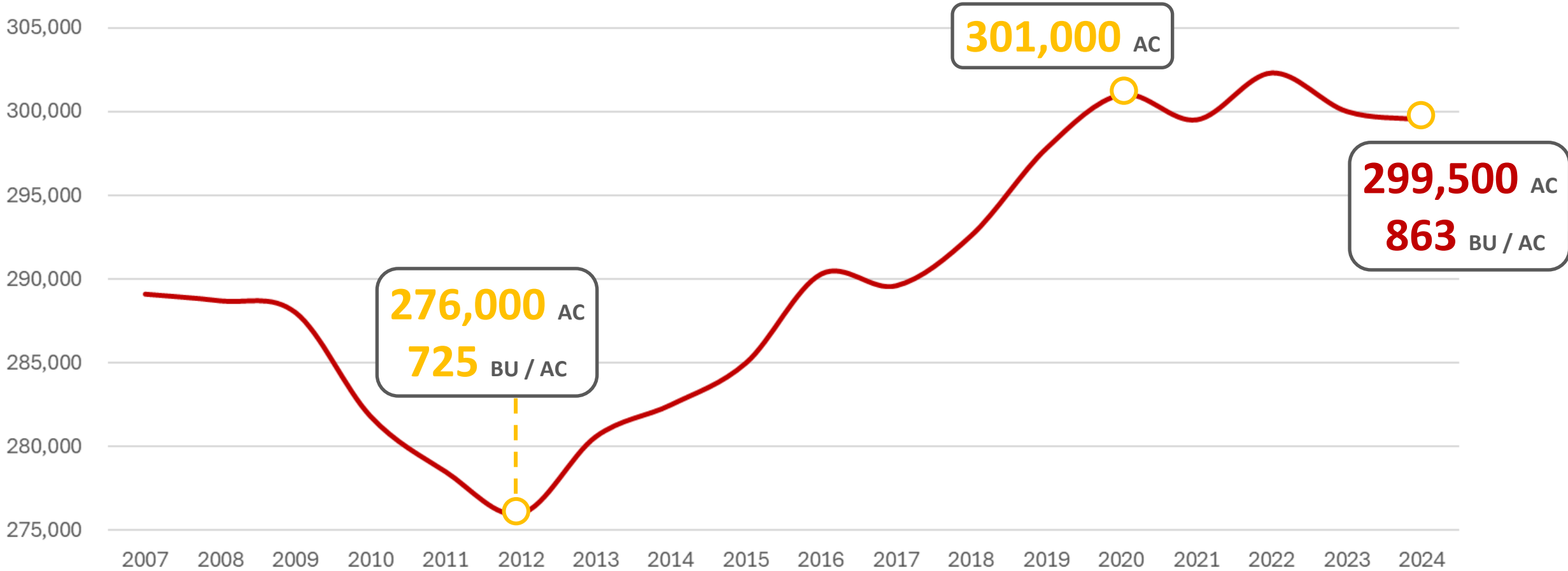
WASHINGTON APPLE PRODUCTION: 2025/26 (F)



USDA Estimate:	190	M BU	(TOTAL)
WSTFA Estimate:	136	M BU	(FRESH ONLY)
USDA Estimate:	144	M BU	(FRESH ONLY)
			75.6%
DIFFERENCE:	8.5	M BU	8%

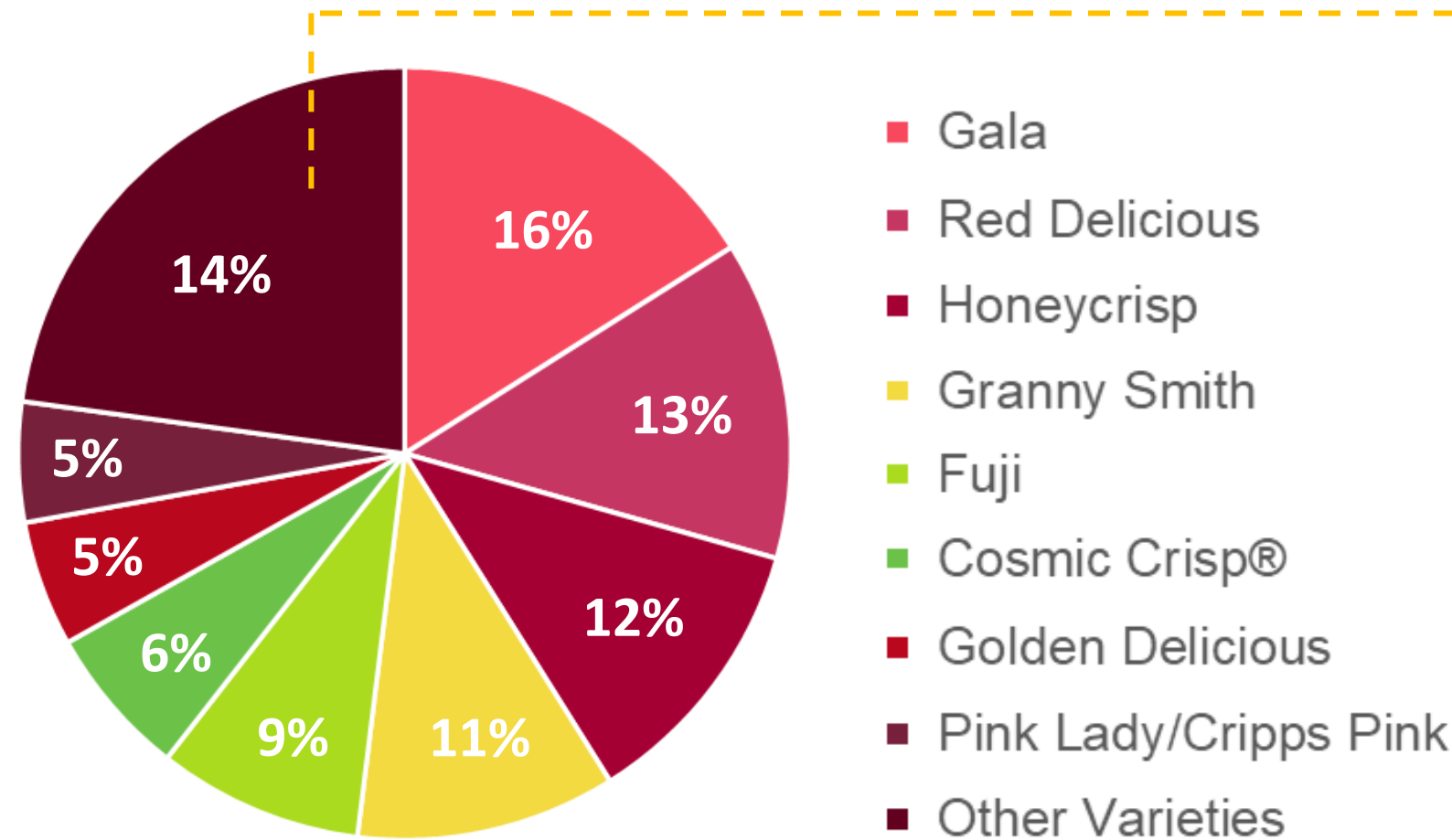
Sources: USDA, NASS; USApple

U.S. APPLE BEARING ACRES & YIELD: TOP 7 STATES



Sources: USDA, NASS; USApple

U.S. APPLE PRODUCTION, BY VARIETY: 2025/26 (F)



Other Varieties:	
Rome	3%
Envy®	2%
McIntosh	2%
Idared	2%
Empire	1%
York	1%
Ambrosia	1%
Cortland	1%
Remaining	10%

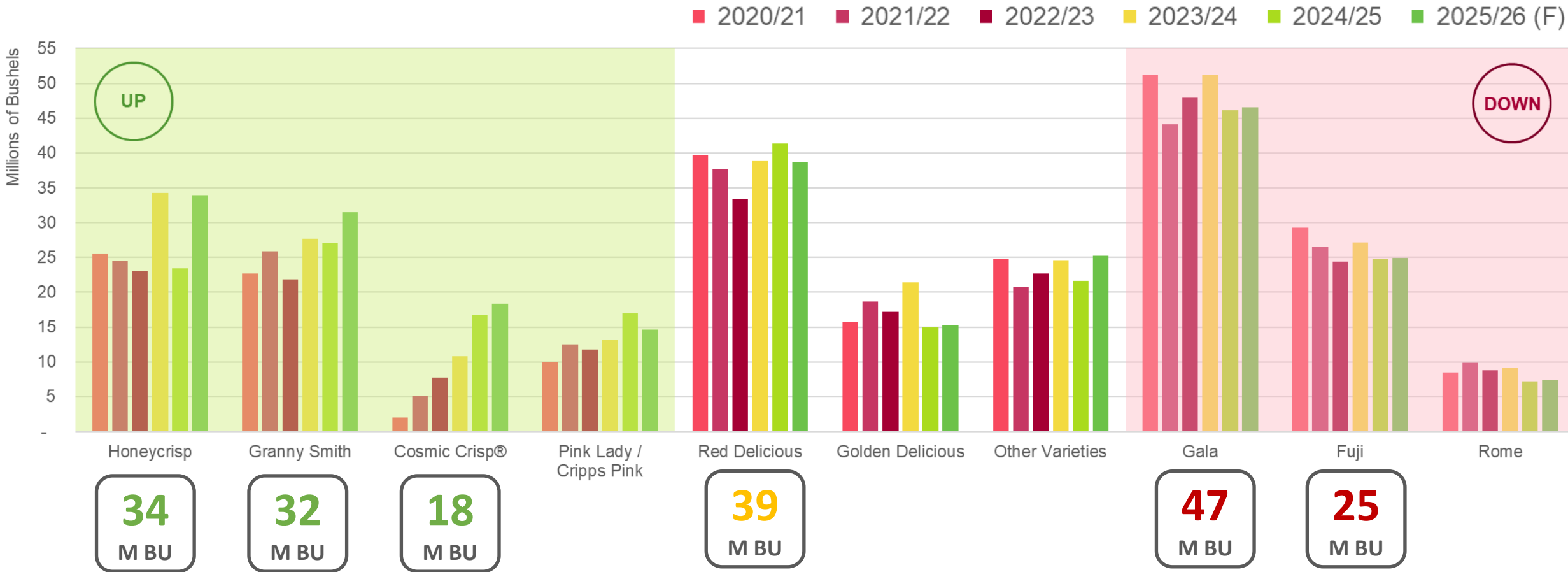
Sources: USDA, NASS; USApple



Where the apple industry grows together



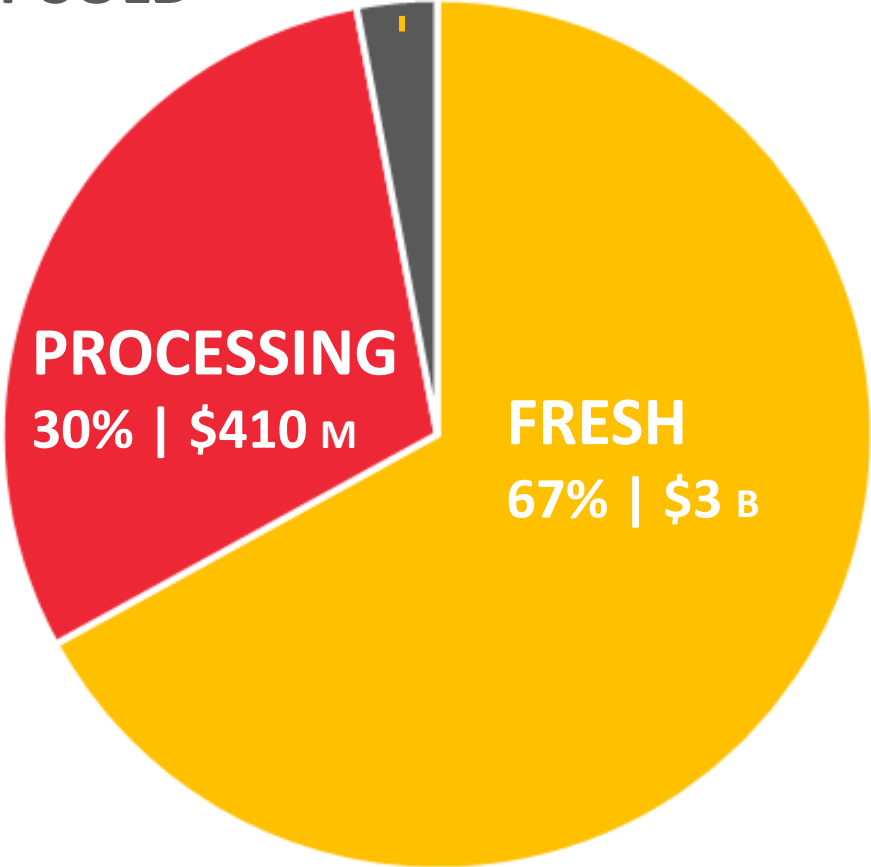
U.S. APPLE PRODUCTION, BY VARIETY: 2025/26 (F)



Sources: USDA, NASS; USApple

U.S. APPLE UTILIZATION: 2025/26 (F)

NOT SOLD
3%

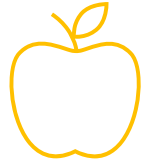


	Oregon	86%		13%
	Washington	76%		20%
	New York	53%		47%
	Michigan	50%		49%
	Virginia	47%		53%
	Pennsylvania	45%		55%
	California	23%		76%
	Other States	51%		48%

Sources: USDA, NASS; USApple

U.S. APPLE STORAGES: AUG 2025

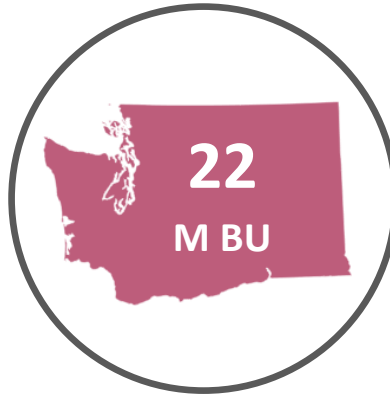
Total Holdings: **25** M BU



18 M BU



7 M BU



➤ Honeycrisp	1.2 M BU
➤ Gala	2.0 M BU
➤ Granny Smith	2.8 M BU
➤ Pink Lady/Cripps Pink	3.2 M BU *
➤ Cosmic Crisp®	4.1 M BU *
➤ Red Delicious	4.2 M BU

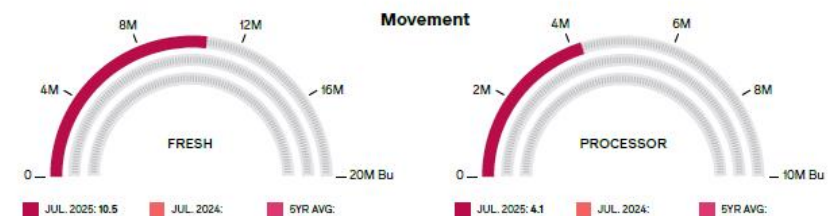
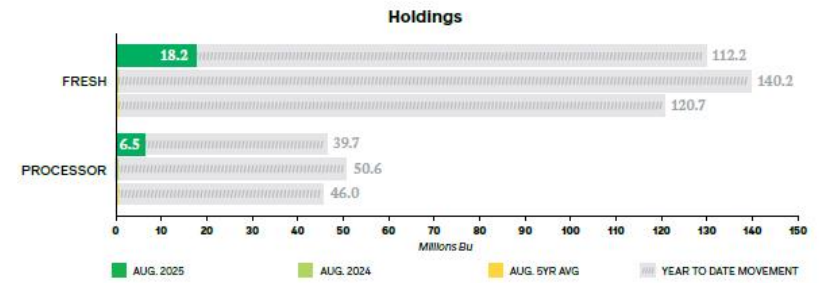


18.2 Million Fresh-Market Holdings

U.S. fresh apple holdings on August 1, 2025 totaled 18.2 million bushels. There are no historical July datapoints with which to calculate year-over-year changes.

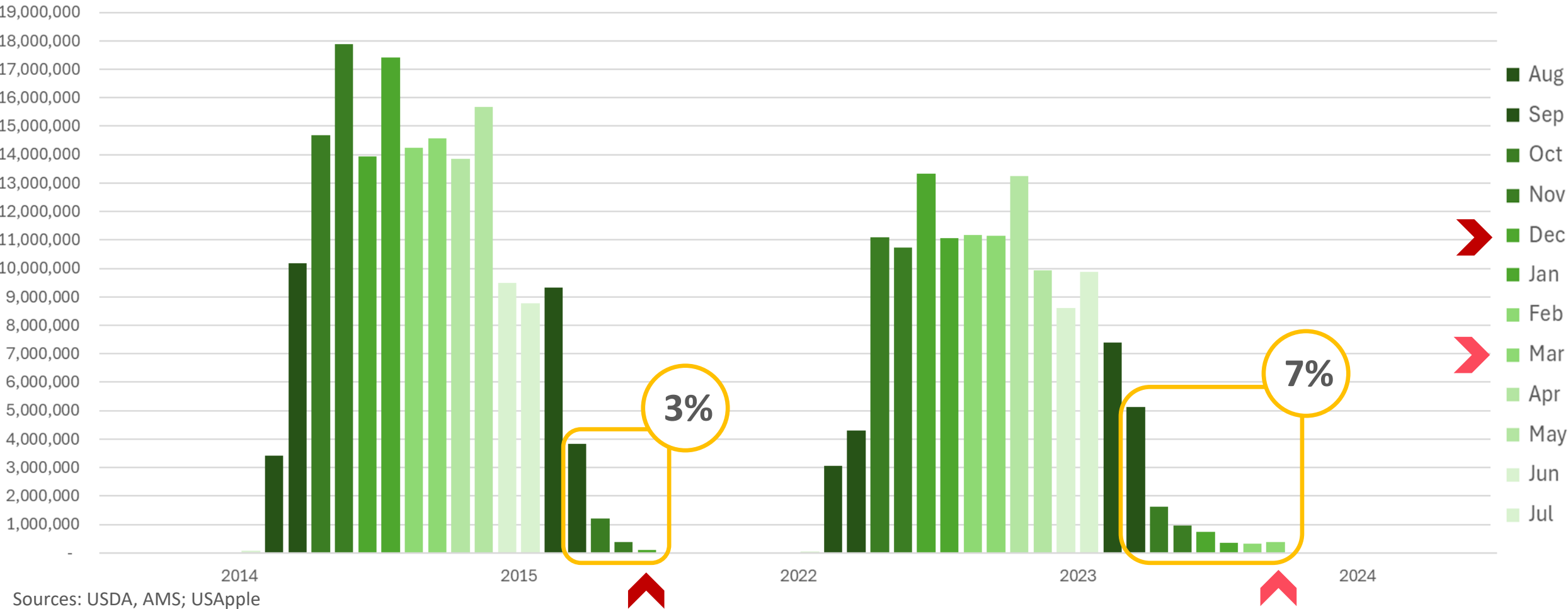
6.5 Million Processing Apple Holdings

U.S. processing apple holdings on August 1, 2025 totaled 6.5 million bushels. There are no historical July datapoints with which to calculate year-over-year changes.



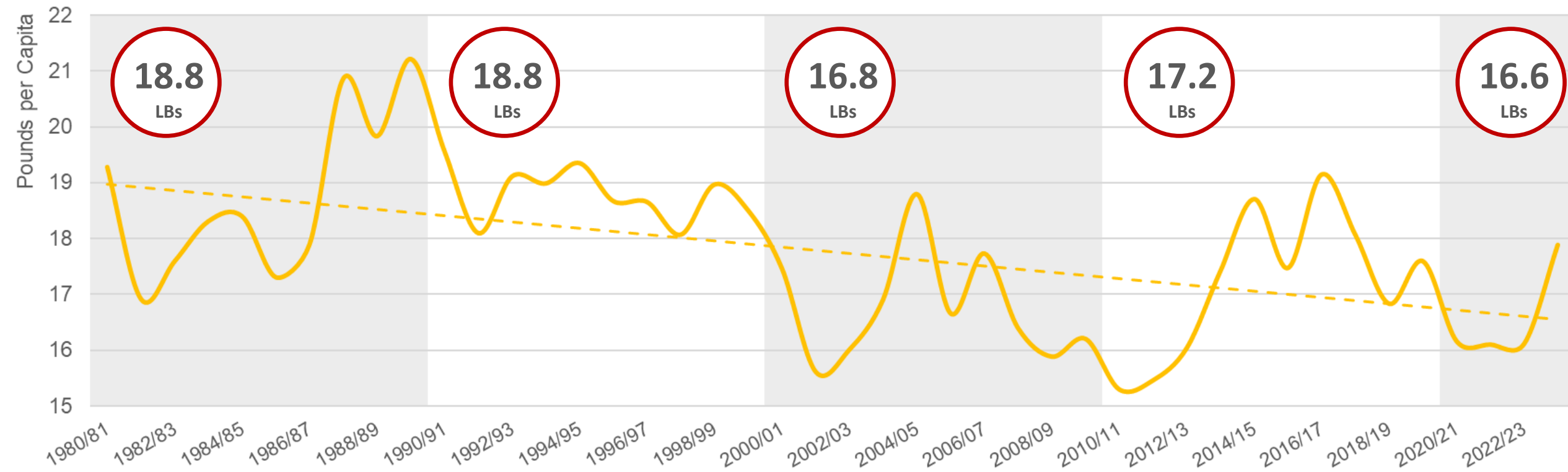
Source: USApple

U.S. APPLE MOVEMENT: LATE SEASON



U.S. FRESH APPLE DOMESTIC CONSUMPTION

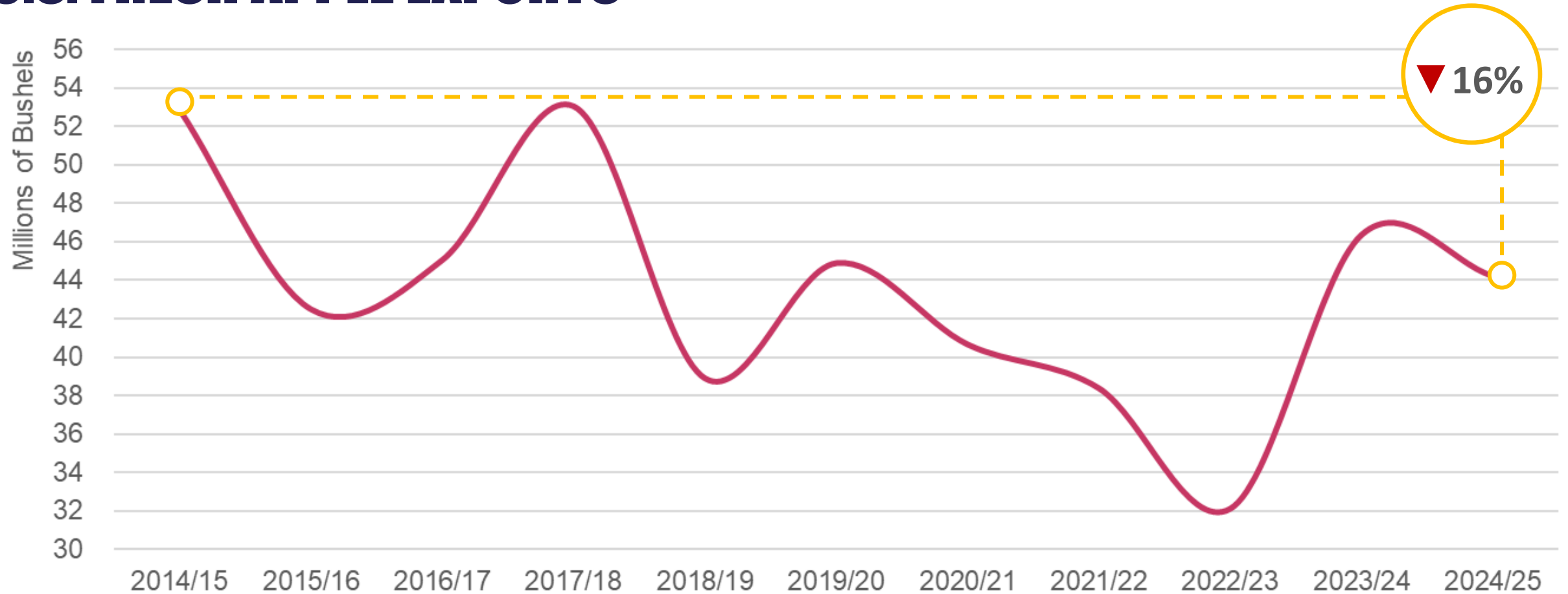
USDA's **Per Capita Food Availability** = Annual Food Supply* / U.S. Population



Sources: USDA, ERS; USApple

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

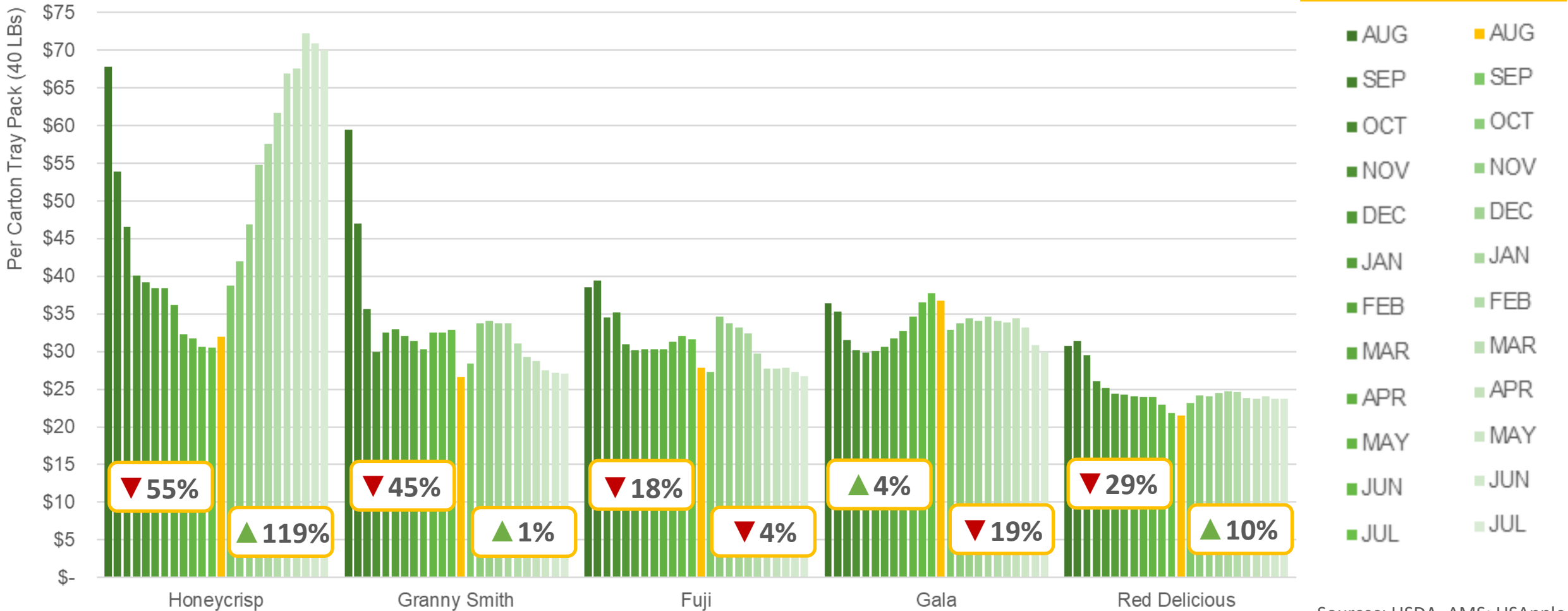
U.S. FRESH APPLE EXPORTS



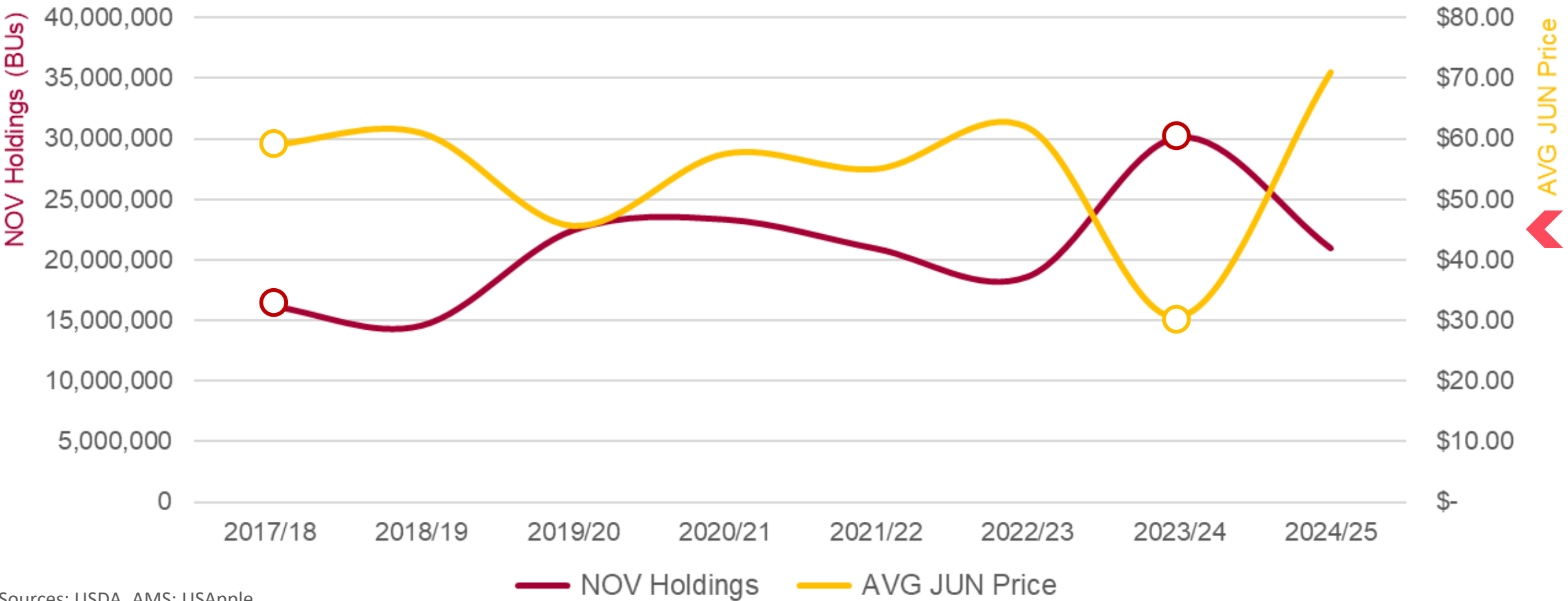
Sources: USDA, FAS; USApple

U.S. APPLE SHIPPING POINT PRICES

2023/24 – 2024/25

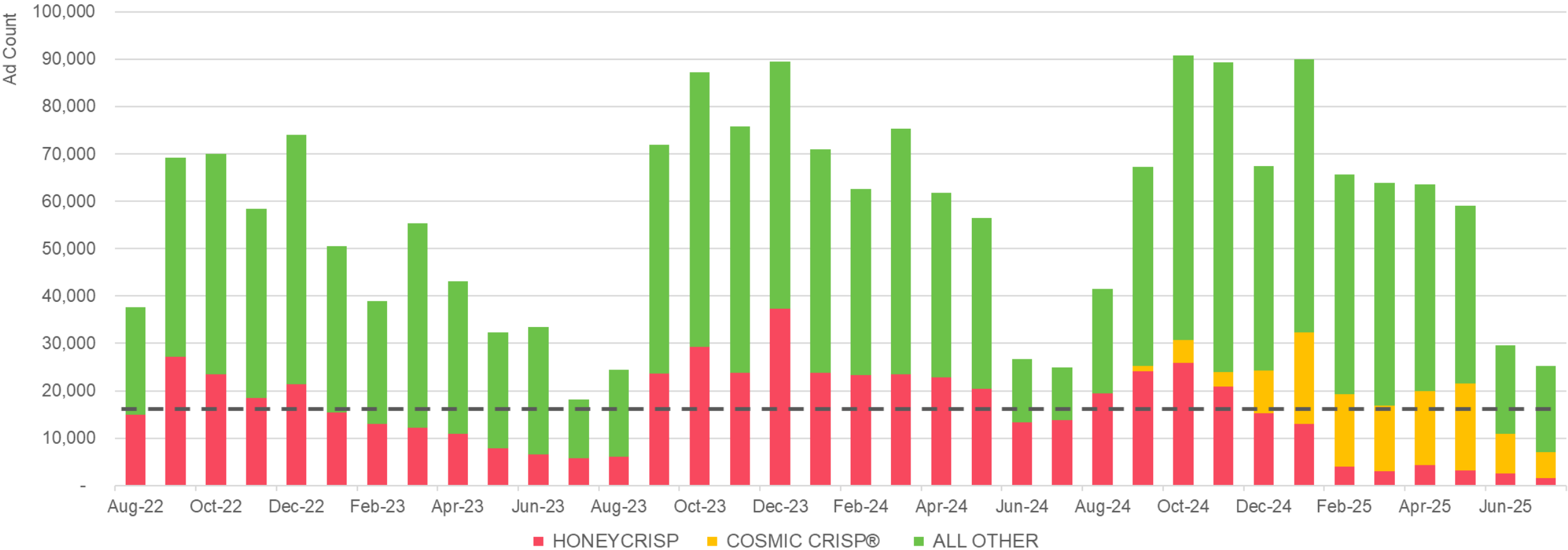


U.S. HONEYCRISP NOV SUPPLY vs. JUN PRICE



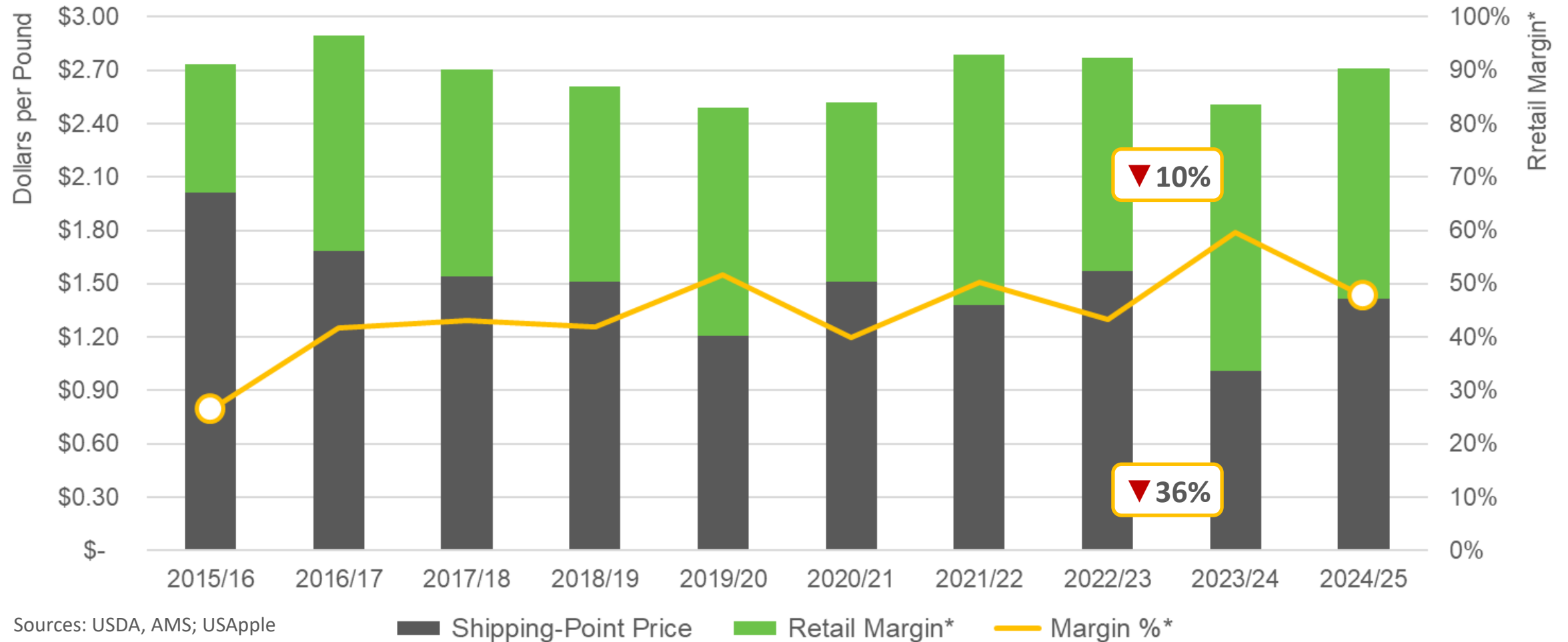
Sources: USDA, AMS; USApple

U.S. HONEYCRISP RETAIL PROMOTIONS



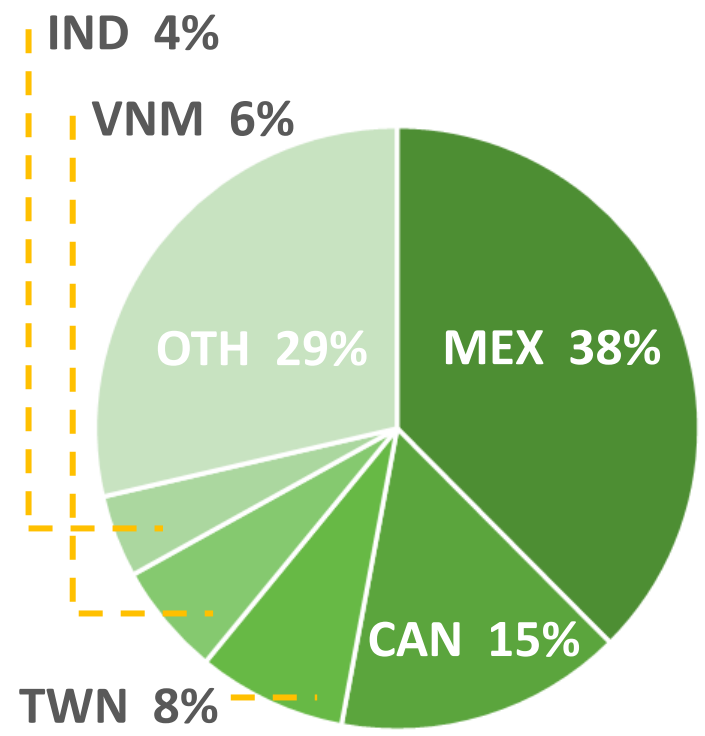
Sources: USDA, AMS; USApple

U.S. HONEYCRISP RETAIL MARGIN*



* Margin does not account for any other costs of goods sold.

U.S. FRESH APPLE EXPORTS: 2024



	Volume (BUs)	Value (\$)
Mexico	17,589,765	\$397,402,000
Canada	7,223,117	\$157,456,000
Taiwan	3,734,632	\$94,511,000
Viet Nam	2,819,620	\$74,074,000
India	2,069,970	\$38,433,000
Other (59)	13,410,735	\$320,095,000

6.	Dom. Rep.	\$35 M
7.	Guatemala	\$30 M
8.	Hong Kong	\$22 M
9.	Colombia	\$19 M
10.	Thailand	\$23 M
11.	Peru	\$16 M
12.	Israel	\$19 M
13.	Indonesia	\$15 M
14.	Honduras	\$12 M
15.	El Salvador	\$11 M

Sources: USDA, FAS; USApple

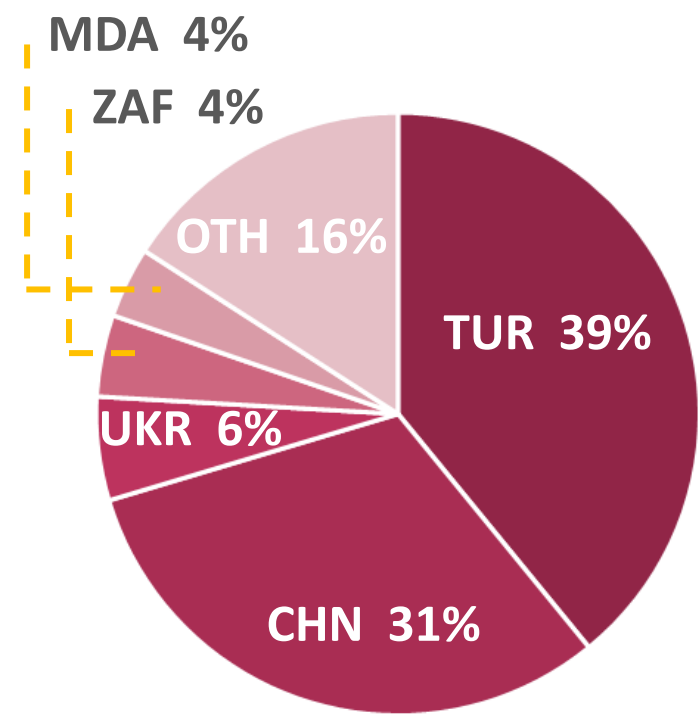


NEW OPPORTUNITIES?: *Japan, South Korea, U.K., Australia, ...*

Where the apple industry grows together



U.S. APPLE JUICE CONCENTRATE IMPORTS: 2024

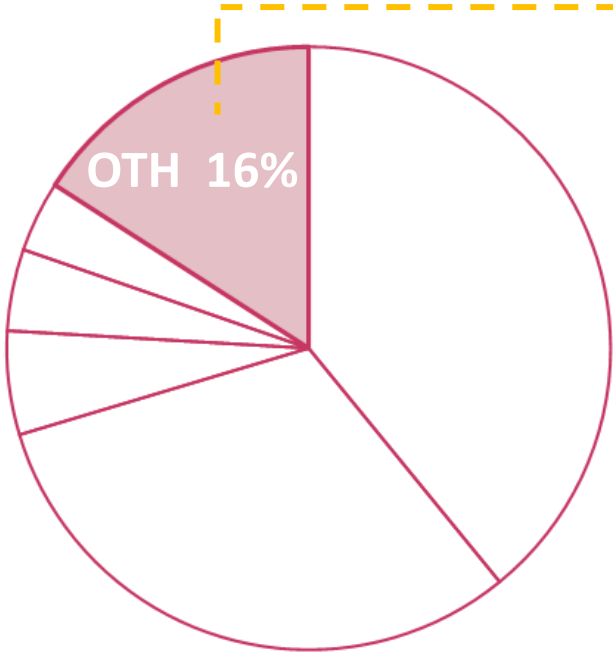


	Volume (GAs)	Value (\$)	T (%)	T (\$)
Türkiye	167,267,450	\$284,024,000	10%	\$28,402,400
China	133,741,355	\$151,196,000	30%	\$45,358,800
Ukraine	23,783,986	\$49,365,000	10%	\$4,936,500
South Africa	18,741,550	\$27,096,000	10%	\$2,709,600
Moldova	18,258,254	\$23,184,000	10%	\$2,318,400
Other (51)	67,975,524	\$152,463,000	~10%	\$13,641,400

Sources: USDA, FAS; USApple

TOTAL APPLE JUICE IMPORT TARIFFS: **\$97.4 M**
assumes no change in volumes

U.S. APPLE JUICE CONCENTRATE IMPORTS: 2024



Sources: USDA, FAS; USApple

Volume (GAs)		
6. Chile	14,171,296	3%
7. Brazil	11,859,183	3%
8. Spain	11,190,326	3%
9. Argentina	8,342,103	2%
10. Poland	8,015,665	2%
11. New Zealand	4,810,651	1%
12. Canada	4,394,924	1%
13. Italy	2,851,446	0.7%
14. France	566,411	0.1%
15. Mexico	342,156	0.1%

Dollars / Gallon **\$1.61**

China	\$1.13
Moldova	\$1.43
Brazil	\$1.44
Hungary	\$1.44
Romania	\$1.45
South Africa	\$1.45
Afghanistan	\$1.46
Poland	\$1.53
Türkiye	\$1.70
New Zealand	\$1.90
Spain	\$1.98
Germany	\$2.02
Ukraine	\$2.08
Chile	\$2.16
Belarus	\$2.32

GLOBAL APPLE PRODUCTION: 2025/26 (F)

CHINA

2 B BU

Top 5 Export Markets

Viet Nam ◀
Indonesia ◀
Thailand ◀
Bangladesh
Philippines



Sources: WAPA; USApple

GLOBAL APPLE PRODUCTION: 2025/26 (F)



“After March comes to an end, there won't be as many quality apples available for export from Turkey.”

- Fresh Plaza, March 21, 2025

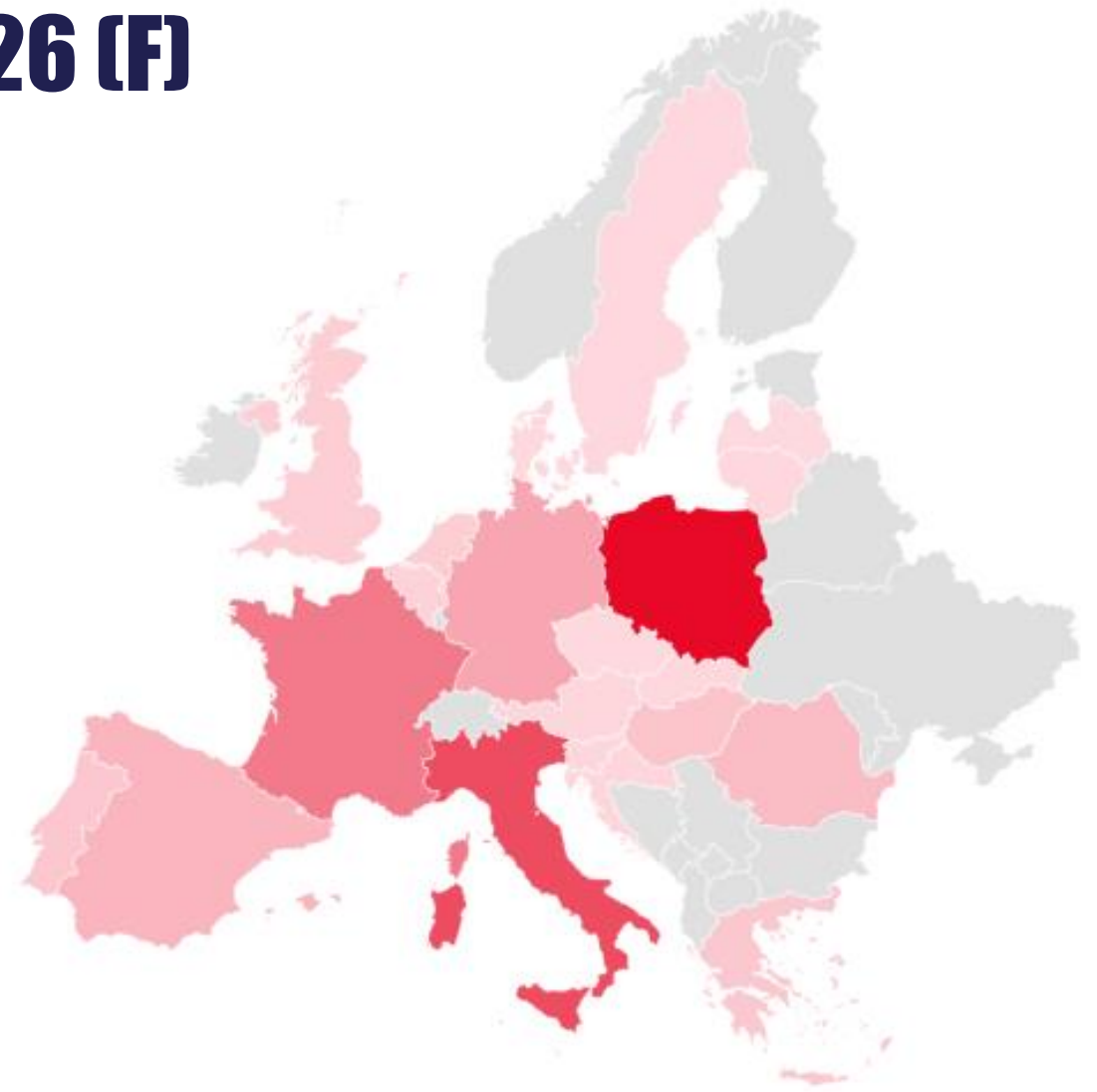
Sources: WAPA; USApple

Top 5 Export Markets

India ◀
Iraq
Russia
Libya
Syria

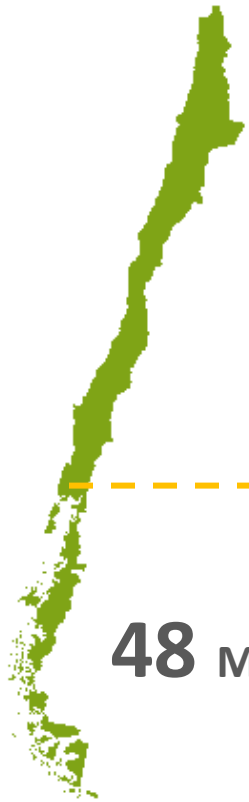
GLOBAL APPLE PRODUCTION: 2025/26 (F)

EUROPE	558 M BU	— 0% YOY
➤ POLAND	173 M BU	▲ 3% YOY
➤ ITALY	118 M BU	▼ 3% YOY
➤ FRANCE	79 M BU	▲ 4% YOY
➤ GERMANY	52 M BU	▲ 15% YOY
➤ SPAIN	26 M BU	▼ 8% YOY



Sources: WAPA; USApple

GLOBAL APPLE PRODUCTION: 2025/26 (F)



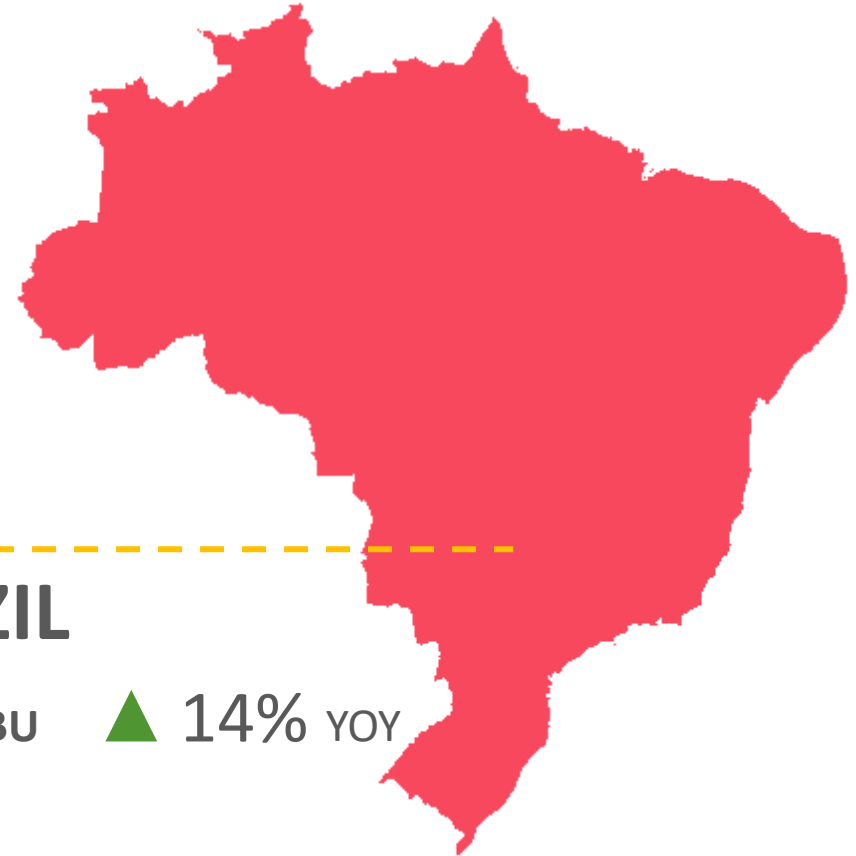
ARGENTINA

28 M BU ▲ 6% YOY



BRAZIL

50 M BU ▲ 14% YOY

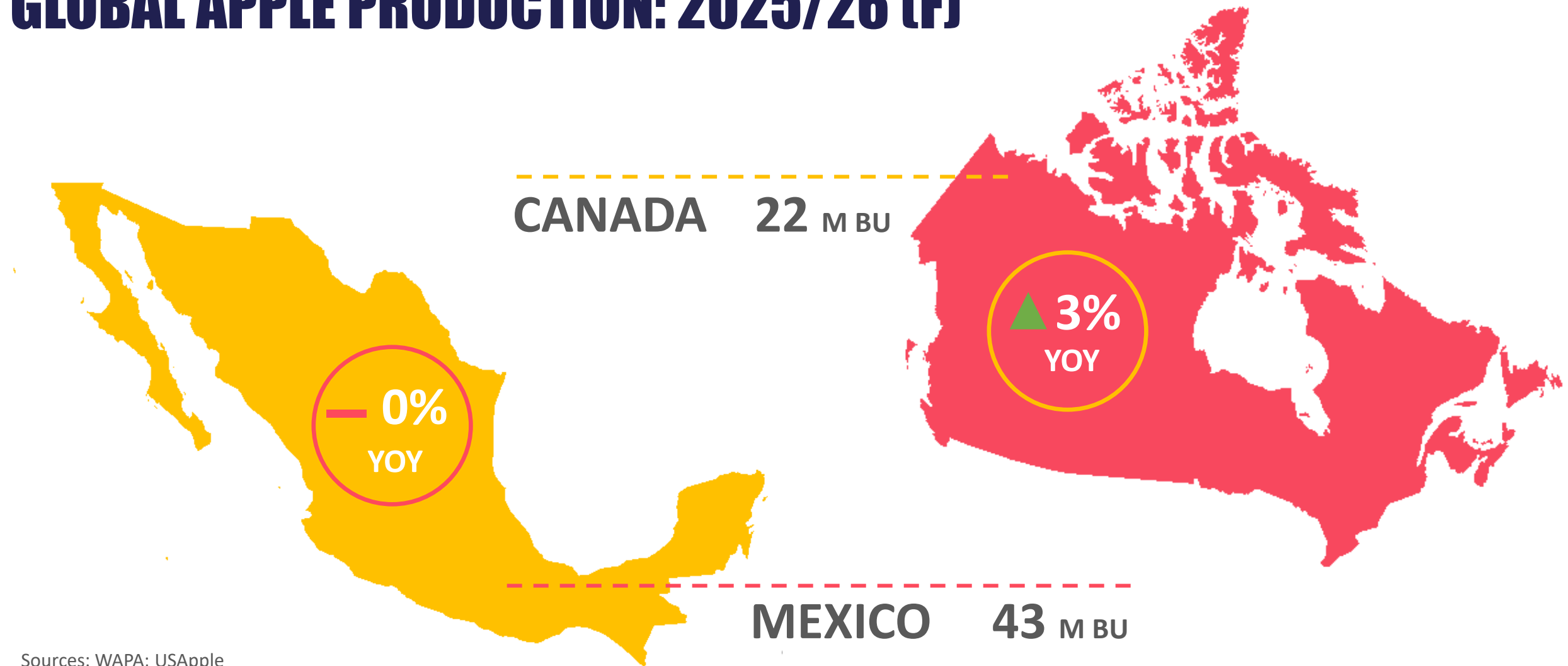


CHILE

48 M BU ▲ 1% YOY

Sources: WAPA; USApple

GLOBAL APPLE PRODUCTION: 2025/26 (F)



Sources: WAPA; USApple

KEY TAKE AWAYS



- ▶ *U.S. apple supplies will remain high in 2025/26 with ample production and remaining 2024/25 storages.*
- ▶ *Domestic demand is slowing, but international demand is showing signs of recovery from a decade-long decline.*
- ▶ *Supply and demand imbalances are leading to historically low grower prices – often below rapidly inflating costs of production, especially labor.*
- ▶ *Uncertainty around tariffs will continue to be a challenge – **expanding existing markets and opening new markets may provide significant opportunities.***





Industry Outlook 2025

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*Better data,
better decisions.*

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Where the apple industry grows together

outlook²⁵