



2026 INDUSTRY OUTLOOK REPORT

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FOREWORD

For more than forty years I have dedicated myself to finding homes for the fruit our growers work so hard to produce and building the relationships that turn a beautiful crop into a fair return for the farmer. In that time, I have watched this industry weather storm after storm and emerge, time and again, more resilient than before.

That perspective matters, because an apple's journey does not end when it is picked. Some of the most remarkable advancements of my career have come after the harvest. Controlled-atmosphere storage that keeps fruit crisp for months, electronic sorting that grades each apple with astonishing precision, and a steady stream of new varieties that have given consumers more reasons than ever to reach for our fruit. We have become extraordinarily good at growing more apples on less land and delivering them fresher, and farther, than my predecessors could have imagined.

And yet, selling those apples has never been harder. Supply continues to climb against stagnant domestic demand and hard-won export markets that too often slip away. Returns to the farmer have fallen to painful lows as the cost of labor, inputs and nearly everything else keeps rising. When revenues are down and expenses are up, the squeeze is felt by every link in our supply chain.

Even so, I am at my core an optimist, and this year I have real reason to be. For the first time in a long while, there is genuine encouragement on the issue that has weighed heaviest on our growers: labor. The U.S. Department of Labor's recent change to how the H-2A wage rate is calculated offers meaningful, overdue relief from a formula that had simply become unsustainable and the introduction of the *Securing Agriculture's Workforce Act* (H.R. 9535) would codify those wage reforms while fixing a number of other long-standing problems in a program our industry cannot function without. There is more work ahead to carry it across the finish line, but this is precisely the kind of progress we have sought for years.

The stakes could not be higher, because our industry is far larger than its 27,000-plus growers.

Beyond the orchard lies a vast supply chain: packers and shippers, the sales and marketing desks where I built my career, processors and cider makers, nurseries, scientists, truckers and retailers. Taken together, the U.S. apple industry supports more than 150,000 jobs, generates \$10 billion in wages and \$2 billion in tax revenue, and contributes \$23 billion to the national economy.

The following report is an essential resource for everyone with a stake in that economy. By understanding the latest trends in production, utilization, prices and trade, we are better equipped to make sound decisions and allocate our limited resources wisely in a fiercely competitive global marketplace. It is just as valuable for the legislators and regulators whose policies can either strengthen or strain our industry, and who hold real influence over the security of our nation's food supply.

Forty years in, my optimism is undimmed. I have seen this industry face down low prices, trade wars, labor crises and killing frosts, and I have watched its people respond every time with grit, ingenuity and an unshakable commitment to one another. The road ahead is not an easy one, but I have never been more certain that we will travel it together. Thank you for all that you do for this remarkable industry, and for the association that gives us one strong, united voice.



K. Steven Smith

STEVE SMITH
Chairman, USApple

CORE FINDINGS

Based on the most recent estimate from the U.S. Department of Agriculture (USDA), U.S. apple production for the 2026/27 crop year will be 10.4 billion pounds or 249 million bushels, a 6% decrease from last year. When accounting for states outside of USDA's coverage (the top seven apple-producing states), the total estimate increases to 263 million bushels.¹ These apples will have a farm-gate value of more than \$3 billion, generated primarily from fresh apple production (see **Table 1**).

At the state level, Washington will remain the nation's top producer with an estimated crop of 176 million bushels valued at more than \$2 billion. This production level represents a 2% decrease from the 2025/26 crop.

New York is projected to stay in the number two spot with around 32 million bushels, a 10% decrease from last season. Michigan is expected to decrease production by 1% to 25 million bushels.



¹Figures for production from additional states are estimated by USApple. For more information on the adjustment, refer to the **U.S. Apple Production** section in the body of this report.



Table 1: U.S. Apple Production & Utilization Summary

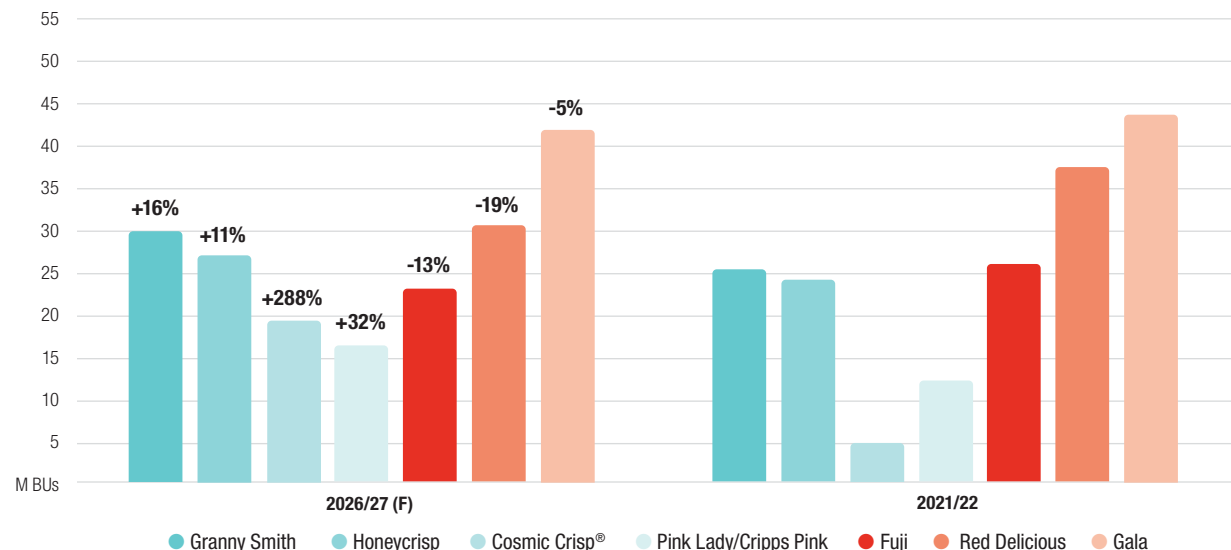
2026/27 (F)	LEVELS	VALUE	YR-OVER-YR % CHANGE
Total Production	263,407,070	\$3,041,030,420	-7%
Fresh	174,637,423	\$2,649,337,684	-5%
Processing	80,832,743	\$391,692,735	-8%
Not Sold	7,936,905	\$-	-18%
BY STATE			
Washington	176,190,476	\$2,034,991,714	-2%
New York	32,142,857	\$351,221,832	-10%
Michigan	25,000,000	\$315,472,457	-1%
Pennsylvania	5,000,000	\$49,766,341	-58%
California	4,523,810	\$53,640,964	1%
Oregon	3,809,524	\$44,326,128	0%
Virginia	1,833,333	\$21,215,542	-48%
Other	14,907,070	\$170,395,442	-15%

Sources: USDA, National Agricultural Statistics Service; USApple
 Notes: Production levels are reported in 42-pound bushels.
 Utilization shares and value data are based on five-year averages: 2021-2025.
 Year-over-year changes are calculated on levels.

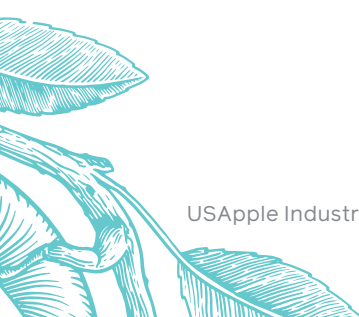
At the varietal level, Gala is expected to retain the top spot with almost 42 million bushels produced, accounting for around 16% of the U.S. apple market. Rounding out the top five are Red Delicious with 30 million bushels, Granny Smith, also with 30 million bushels, Honeycrisp with 27 million bushels, and Fuji with 23 million bushels.

Over the last five years, Granny Smith, Honeycrisp, Cosmic Crisp® and Pink Lady/ Cripps Pink have been on the rise at the expense of Fuji, Red Delicious, and Gala. **Figure 1** highlights these top varieties along with current production estimates and five-year growth rates.

Figure 1: U.S. Apple Production, Varietal Summary



Sources: USApple; California Apple Commission; Washington State Tree Fruit Association





With respect to fresh apple imports and exports, the U.S. still retains a healthy positive trade balance. In the 2025/26 season (July to June), the U.S. exported almost 45 million bushels of fresh apples while only importing around 4 million bushels. These 41 million bushels of net exports are valued at more than \$1 billion (see **Table 2**).

On a year-over-year basis, the balance of trade has increased with respect to both quantity and value. On the quantity side, imports decreased by 12% over 2024/25 levels while exports grew by 2%. On the value side, exports are up by around 11% while imports are down by around 17%.

As for global supply, China will continue to dominate the world market, producing an estimated 1.8 billion bushels in 2026/27.² This represents a 1% increase compared to 2025/26 production levels. Europe is expected to drop considerably from last season, producing around 508 million bushels. South America, already well into their season, looks like it has grown by 5% compared to last year's crop, producing around 127 million bushels. Mexico is predicted to have a slight decrease in the coming crop year, with production falling to 47 million bushels, down 1% from 2025/26. Finally, Canada is also expected to decrease production, down 2% to almost 19 million bushels (see **Table 3**).³

Additional data and analyses regarding estimates for 2026/27 U.S. and global apple crop production, utilization and trade are contained in the following report.

Table 2: U.S. Fresh Apple Trade Summary

	2025/26	2024/25	YR-OVER-YR % CHANGE
LEVELS			
U.S. Balance of Trade	40,903,060	39,565,334	3%
Total Exports	44,894,703	44,105,596	2%
Total Imports	3,991,643	4,540,263	-12%
VALUE			
U.S. Balance of Trade	\$1,030,066,000	\$894,176,000	15%
Total Exports	\$1,151,482,000	\$1,041,170,000	11%
Total Imports	\$121,416,000	\$146,994,000	-17%

Sources: USDA, Foreign Agricultural Service; USApple
Note: Trade levels are reported in 42-pound bushels.

Table 3: Global Apple Production Summary

	2026/27 (F)	2025/26	YR-OVER-YR % CHANGE
United States	263,407,070	281,817,359	-7%
China	1,810,937,857	1,800,964,576	1%
Europe	507,744,982	600,968,914	-16%
South America	127,028,105	120,624,209	5%
Mexico	46,716,948	47,136,875	-1%
Canada	18,943,396	19,286,404	-2%

Sources: USDA, National Agricultural Statistics Service and Foreign Agricultural Service; USApple; United Nations, Food and Agricultural Organization; World Apple and Pear Association; Apples Canada/Pommes Canada
Notes: Production levels are reported in 42-pound bushels. South American crop year is earlier than northern hemisphere countries by approximately six months.

² Alternative estimates from the USDA and UN (2023, 2024, and 2025), consistently put annual Chinese production in the range of 2.5 to 2.7 billion bushels.

³ The European total represents the production from 21 select countries. The South American total represents the production from three select countries. For more information about the countries included, refer to the **Global Apple Production** section in the body of this report.



INTRODUCTION

The 2025/26 season continued to be challenging for U.S. apple growers. Following a record crop in the 2023/24 season and another sizable crop last year, this season's production levels remained well above the five-year average. With domestic demand flat and exports below historical levels, farm gate prices remained low for most varieties. Unfortunately, costs continued to rise, putting pressure on margins and, in many cases, leading to negative returns. To assist the industry in adapting to its challenges and leveraging its opportunities, the following report provides users with the most up-to-date data and analysis on U.S. and global apple production, utilization and trade. The remainder of this section is intended to provide those data and analyses with relevant context.





U.S. MACROECONOMIC CONDITIONS

In late 2024 after several years of rapid inflation, prices began to moderate and the Federal Reserve responded by cutting interest rates six times to where it is now between 3.5% and 3.75%.⁴ Additional rate cuts were hoped for, but with the recent war in Iran, inflation has ticked up once again and the central bank has elected not to reduce rates further as they take a “wait and see” approach.⁵

Their primary concern remains uncertainty. Uncertainty around expanding global conflict; around the continued use of tariffs as a frequent and aggressive foreign policy lever; and around the rise of the artificial intelligence economy and its effects on capital investment, energy demand and job displacement.

In the first quarter of last year, U.S. companies were scrambling to import as much as they could before the “Liberation Day” tariffs took effect sending gross domestic product (GDP) into negative territory (-0.6%). Since that time, GDP has remained positive – growing at an average of 2.1% over the last four quarters – due in large part to significant growth in non-residential

private investment (a.k.a. data centers). The extent to which this trend can continue is unknown with many drawing parallels to the dot-com bubble of the late-1990s.

This uncertainty has also had a significant impact on the strength of the dollar. After falling by 10% in the first seven months of 2025, it has struggled to recover, rising by 3% over the past year.⁷ While generally considered to be a concerning sign, indicative of lower confidence in U.S. markets, a weaker dollar is positive for exporters as American products are relatively cheaper abroad. For imported goods, the opposite is true, as dollars will have less purchasing power abroad (holding tariff levels constant).

On the labor market front, uncertainty has also slowed hiring. Employers added just 164,000 jobs in 2025, an increase of 0.1%. That pace has picked up somewhat through the first half of 2026 with the economy adding 266,000 jobs, but the growth rate is still well below historical averages. Over the last 18 months, the unemployment rate has remained relatively stable, increasing by 0.1 percentage points to 4.1%.⁸

⁴ Federal Reserve Bank of New York. Effective Federal Funds Rate. July 2026.

⁵ From March 2026 through June 2026, the consumer price index – a common measure of inflation – increased by an average of 3.7% per month, almost double the Federal Reserve’s 2% target rate.

⁶ U.S. Department of Commerce, Bureau of Economic Analysis. Gross Domestic Product, 2nd Quarter 2026 (Adv).

⁷ MarketWatch.com. U.S. Dollar Index (DXY). July 2026.

⁸ U.S. Department of Labor, Bureau of Labor Statistics. Current Employment Statistics & Current Population Survey: July 2026.



U.S. APPLE MARKET CONDITIONS

While the nonfarm labor situation is certainly relevant in a larger sense, it's farm labor that is of the greatest concern to the U.S. apple industry. By all accounts, domestic agricultural labor has been getting harder to find. Over the last decade, total crop production employment has fallen by almost 6% and, in apple orchards specifically, it has declined by 20%.⁹

One reason for this is that agricultural workers are, on average, older and aging faster than U.S. workers in general. In 2025, the median age of crop production employees was 47.1 compared to 42.1 for all employees – an age gap of 5 years.¹⁰ Another often cited reason for this shortfall is the notion that current immigration policies do not prioritize individuals with agricultural backgrounds.

Perhaps the largest obstacle to finding and retaining local employees is the seasonal nature of the work. Because every apple in the U.S. is still picked by hand and must be picked within a short window of peak maturity¹¹, most of an orchard's annual labor hours are utilized during the two or three months of harvest. There is simply not enough work during the other nine to ten months of the year to support a local domestic labor force.

With few other options, U.S. farms have had to turn to the Temporary Agricultural Worker Program (H-2A visas) to meet their labor needs. In 2016, there were around 190,000 certified H-2A positions. That figure ballooned to more than 398,000 certifications in 2025 – a 109% increase over the decade.¹²

This is a critical issue for the U.S. apple industry because labor accounts for around 60% of

total production costs and that labor has been getting more expensive. Over the ten years from 2016 to 2025, the U.S. average Adverse Effect Wage Rate (AEWR) – the minimum compensation rate for H-2A labor – rose from \$11.69 to \$17.74 per hour, a 52% increase. For the top seven apple-producing states, the 2025 average was even higher at \$18.67 per hour.¹³

Fortunately, after years of work by USApple and coalition partners, the U.S. Department of Labor agreed that this trend was unsustainable and changed the way the AEWR was calculated. Beginning in the fall of 2025, the new rates took effect with an interim final rule – a regulatory, not legislative fix.

The rule changes the calculation of the wage rates in two important ways. First, it splits each state's rate into two tiers: Level 1 for entry-level positions and Level 2 for skilled positions. Second, for those workers who are provided with housing, it applies an Adverse Compensation Adjustment factor based on a state's fair market rents. In all but a few cases, these new rates are significantly lower than they had been previously.

It's important to note however, that, regardless of these published federal standards, rates cannot fall below a state's minimum or prevailing wage. For this reason, in six of the top seven apple-producing states, Level 1 wages are irrelevant as they are below state-mandated minimums. In four of the top seven primary apple states, state-mandated minimums are higher than even Level 2 rates.¹⁴

⁹ U.S. Department of Labor, Bureau of Labor Statistics. Quarterly Census of Employment and Wages: 2016–2025..

¹⁰ U.S. Department of Labor, Bureau of Labor Statistics. Current Population Survey: Table 18b: 2025.

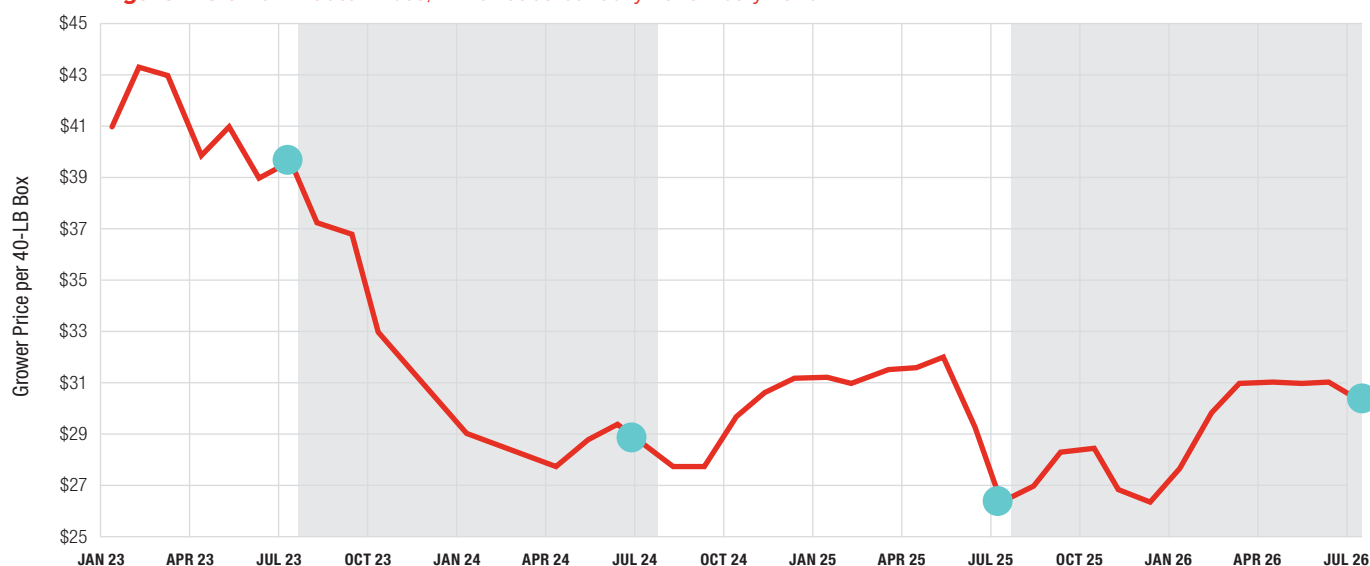
¹¹ Different varieties mature at different times over the course of the harvest season. Orchards with more staggered varieties can make do with smaller crews for longer periods while orchards with fewer staggered varieties may need more workers for a shorter duration.

¹² U.S. Department of Labor, Employment and Training Administration. Office of Foreign Labor Certification: 2016–2025.

¹³ U.S. Department of Labor, Employment and Training Administration. Adverse Effect Wage Rates: 2016–2025.

¹⁴ 2026/27 Level 1 and 2 H-2A wage rates and Adverse Compensation Adjustment factors were published on August 3, 2026. Pennsylvania is the only state with minimum wages below Level 1 rates. Michigan, Pennsylvania and Virginia are the only states with minimum wage thresholds below Level 2 rates.

Figure 2: U.S. Farm-Gate Prices, All Varieties: January 2023 – July 2026



Sources: USDA, Agricultural Marketing Service; USApple

Note: Prices represent domestic inflation-adjusted national averages for carton tray packs, all item sizes, all grades.

Even with these limitations, the AEWR under the new methodology is significantly lower than prior rates and the savings are already showing up in the data. According to disclosure records from the Labor Department, the average H-2A labor rate in 2025 – mostly based on the old methodology – was \$18.34 per hour. Through the second quarter of 2026, that rate had fallen to \$16.34 per hour, a decrease of almost 11%. For apple orchards specifically, the declines were more muted but still significant with average rates falling by around 5% from \$18.61 to \$17.63 per hour.¹⁵ While certainly a welcome savings, these rates remain a considerable expense and do not include additional costs H-2A employers are responsible for like transportation and application and visa fees.

Given these additional costs, it stands to reason that apple growers would prefer to hire domestic workers whenever possible. However, as noted above, fewer Americans are turning up to do the job. With this trend unlikely to change anytime soon, the U.S. apple industry must have a well-functioning, affordable alternative. The industry also needs certainty that the next administration won't simply revert to the prior methodology through similar regulatory changes.

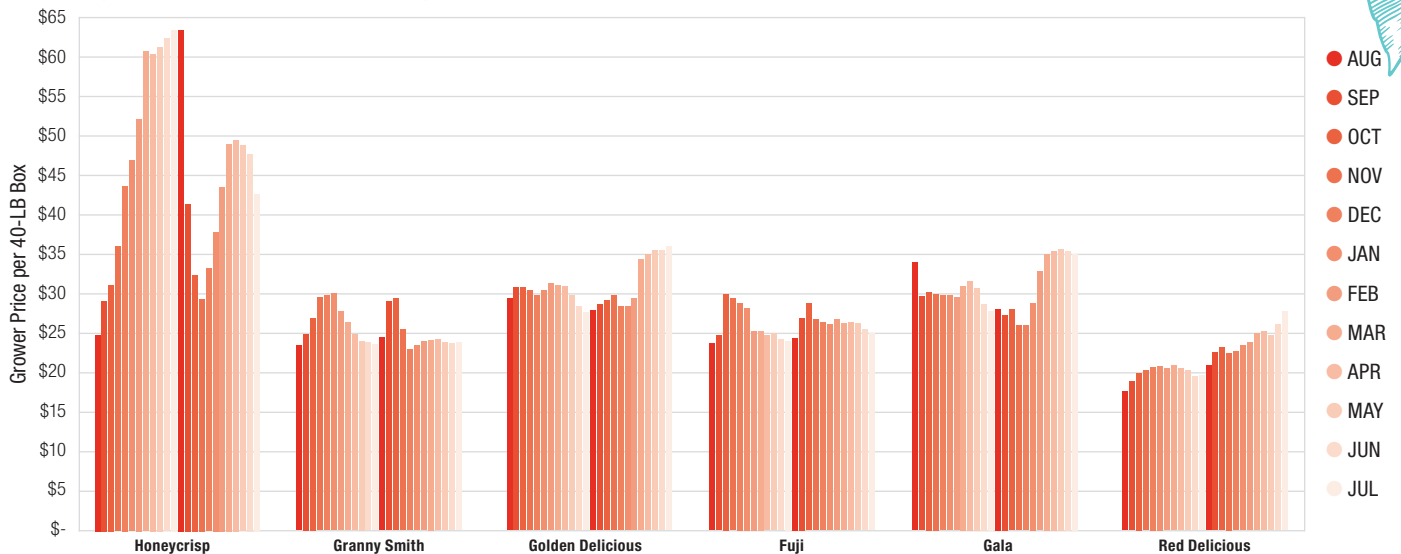
To achieve that certainty and codify the new wage calculation – as well as make other long-overdue improvements to the H-2A program – USApple and our coalition partners worked with House Agriculture Chairman, Glenn “GT” Thompson to introduce H.R. 9535, the bipartisan *Securing Agriculture’s Workforce Act of 2026* (SAWA). Passage of this bill is critical not just for the apple industry but for all labor-intensive agriculture that doesn’t have mechanized alternatives for skilled tasks like planting, pruning and picking. In short, SAWA would be a lifeline to the thousands of farms desperate for access to reliable, affordable labor as they strive tirelessly to grow the crops that feed the nation.

Unfortunately, while costs have been on the rise, apples prices have been falling. During the 2023/24 season, inflation-adjusted grower prices for carton tray packs (40-pound boxes) declined from around \$40 to less than \$29, a drop of more than 28%. The following season, prices looked to be rebounding through the winter and spring but then fell significantly through the summer, ending down an additional 8% to around \$26.50 per box. In the 2025/26 season, prices have rebounded somewhat, closing up around 16% to just under \$31 per box (see **Figure 2**).

¹⁵ The \$17.63 per hour average wage is well above the 2026 minimum rates in all seven of the top apple-producing states ranging from \$7.25 per hour in Pennsylvania to \$17.13 per hour in Washington.



Figure 3: U.S. Farm-Gate Prices, by Select Varieties: 2024/25 & 2025/26



Sources: USDA, Agricultural Marketing Service; USApple

Note: Prices represent national averages for carton tray packs, all item sizes, all grades.

According to 2024 data from Washington State University (WSU), these prices are often below the cost of production. For Washington growers on a vertical spindle trellis system (assuming certain net yield and pack-out percentages), the WSU researchers estimated that 2024 Honeycrisps would have had to sell for around \$43.50 per box to just cover variable costs. For Gala, Granny Smith and Cosmic Crisp® those costs are considerably lower at around \$30 per box, but even at that lower threshold, prices have not been sufficient to cover variable expenses for 19 of the past 36 months – 53% of last three seasons.¹⁶ Those negative returns are simply not sustainable for growers that do not also have ownership in other parts of the apple supply chain like storage, packing or sales.¹⁷

Fortunately, as noted above, average prices this season have been increasing. As shown in **Figure 3**, Honeycrisp prices crashed at the start of the season with a strong harvest but rebounded quickly once quality issues were detected and packouts were lower than expected. Pricing for Gala, Golden and Red

Delicious have also ticked up this year while Granny Smith and Fuji have largely remained flat.¹⁸

Farmers are generally asset rich and cash poor. They cannot operate below the cost of production for too many years before their limited cash runs out. Typically, community banks and other agricultural lenders step in to bridge the gap, providing cash to cover growing and harvesting costs with the expectation that they will be paid back with the profits from the sale of the apples. With growing uncertainty around the prospect of future profits, these lenders are increasingly amending the loan covenants to include physical assets as collateral. At some point, however, even the possibility of owning the farm may not be enough to keep sufficient capital flowing. When that time comes, a great number of multi-generational farms will have some hard choices to make.

Beyond the debt markets, a number of larger operators have developed partnerships

¹⁶ Washington State University, School of Economic Sciences. Washington Enterprise Budgets for Crop Commodities: Cosmic Crisp, Gala, Granny Smith and Honeycrisp: 2024.

¹⁷ The National Council of Real Estate Investment Fiduciaries (NCREIF) tracks a Farmland Index comprised of investment-grade properties. A subset of that Index is a portfolio of 39 apple orchards in Washington valued at close to \$600 million. As of Q1 2026, the NCREIF Apple Index was reporting a -2.2% annual return on income and -7.5% annual return on capital.

¹⁸ USDA, Agricultural Marketing Service. My Market News, Shipping Point: August 2024–July 2026.



with various sources of private equity. Those partnerships differ greatly with respect to their motivations for investment and the terms of the deal. But, for the most part, these funds seem committed to a longer time horizon than is typical – and they have no interest in seeing the value of their assets decline through liquidations and a reappraisal of the market. Over the next several years, however, it is likely that there will be market consolidation as some of these players merge or exit their positions.¹⁹

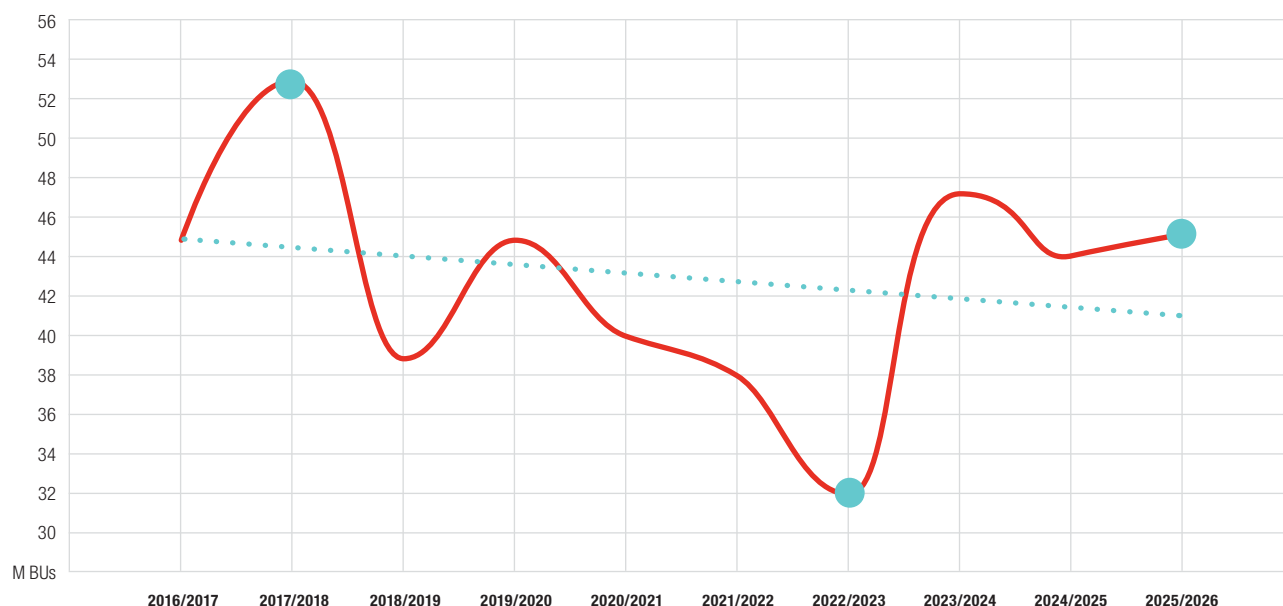
With expenses rising and revenues falling, the U.S. apple industry has had no choice but to get more efficient. In 2012, there were 276,000 bearing acres in the top seven apple producing states. By 2025, that number had grown to 297,000 acres – an 8% increase. During the same period, production in the top apple states rose from 200 million bushels to 264 million bushels – a 32% increase. Because production is growing faster than the acreage, the yield per acre has also increased, rising

from 725 bushels per acre in 2012 to 890 bushels per acre in 2025.

Up to this point, the discussion of U.S. apple market conditions has been primarily concerned with factors impacting the supply of apples, but there are a number of demand-side factors that also deserve consideration.

Although considerable space has been dedicated to this topic in a later section of this report, the importance of export markets to U.S. apple growers cannot be overstated. These foreign markets play a crucial role in helping to regulate domestic supply levels and maintain prices here at home. Over the last decade, due to a number of factors including COVID-19 disruptions, a historically strong dollar and trade disputes, U.S. growers have seen many of their export markets erode. From highs enjoyed during the 2017/18 season, fresh apple exports have fallen by 15% over the past decade (see **Figure 4**).²⁰

Figure 4: U.S. Annual Fresh Apple Exports



Sources: USDA, Foreign Agricultural Service; USApple

¹⁹ In June 2026, a major vertically integrated Washington producer filed for voluntary Chapter 11 restructuring citing difficulty servicing existing debts given historically low returns over recent, consecutive seasons. Immediately following the filing, it was announced that another large vertically integrated operator in the state had made an opening bid for the distressed assets. The proposed merger would create a company with the capacity to supply around 10% of Washington's fresh apple production.

²⁰ USDA, Foreign Agricultural Service. Global Agricultural Trade System: Apple Exports: July 2016–June 2026.

Perhaps the most significant of these disruptions occurred when, in response to U.S. tariffs on Indian steel and aluminum, India placed a retaliatory tariff on U.S. apples (among other products). In a few short years (2018-2022), India went from our second largest fresh apple export market to near zero costing U.S. growers an estimated \$650 million in lost sales.

In June 2023, India announced that they would be removing the retaliatory tariffs on U.S. apples. By 2025/26, they were back to buying \$30 million per year. While certainly an encouraging sign, it pales in comparison to the \$157 million in annual U.S. exports they had been purchasing before low-cost providers like Iran and Türkiye got their foot in the door.

With the on-again, off-again nature of the tariff and trade negotiations, it's difficult to say if there are now more opportunities than threats. On the one hand, the Administration's aggressive and unpredictable tactics may be uniquely suited to break longstanding unfair trade practices. It would be a significant win for the industry to gain access to new markets like Japan or South Korea who utilize nontariff-related phytosanitary requirements to keep U.S. apples out. Similarly, it would be great to have current fresh apple trading partners, like Viet Nam or India, lower their tariff rates against U.S. apples.

On the other hand, provoking Mexico and Canada into placing retaliatory tariffs on U.S. apples would be disastrous. Those two countries alone are responsible for more than half of total fresh apple exports, worth around \$650 million annually. Similarly, it would be problematic to get into trade wars with all the countries that supply the U.S. with apple juice concentrate (AJC). By some estimates, U.S. capacity to produce AJC is only around 5% to 10% of domestic demand. Depending on the tariff levels and specific trading partner, this could be a significant cost to an industry importing nearly \$700 million worth of juice and juice concentrate annually.

On the domestic demand front, there appears to be a longer-term trend towards less apple consumption per capita, particularly among the younger generations. The apple industry can do a better job educating consumers, raising awareness of both classic and new varieties and touting the myriad nutritional benefits. The grassroots, Eat More Apples™ campaign is an industry-led effort to get these positive messages out there and drive additional consumption across all generations.²¹

From H-2A labor force issues to tariffs, the trends and forces detailed above are helping to shape the U.S. apple industry in real time. Users of this report should keep these factors in mind as they evaluate the production, utilization and trade data that follow.



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²¹ Eat More Apples™. Website: <https://eatmoreapples.org>

U.S. APPLE PRODUCTION

According to a USApple analysis of USDA data, total U.S. apple production for the 2026/27 crop will be around 11.1 billion pounds or 263 million bushels. This represents a 7% decrease compared to last year's production figure and is 3% less than the five-year production average (see **Figure 5**).

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MILLION BUSHELS
PRODUCED

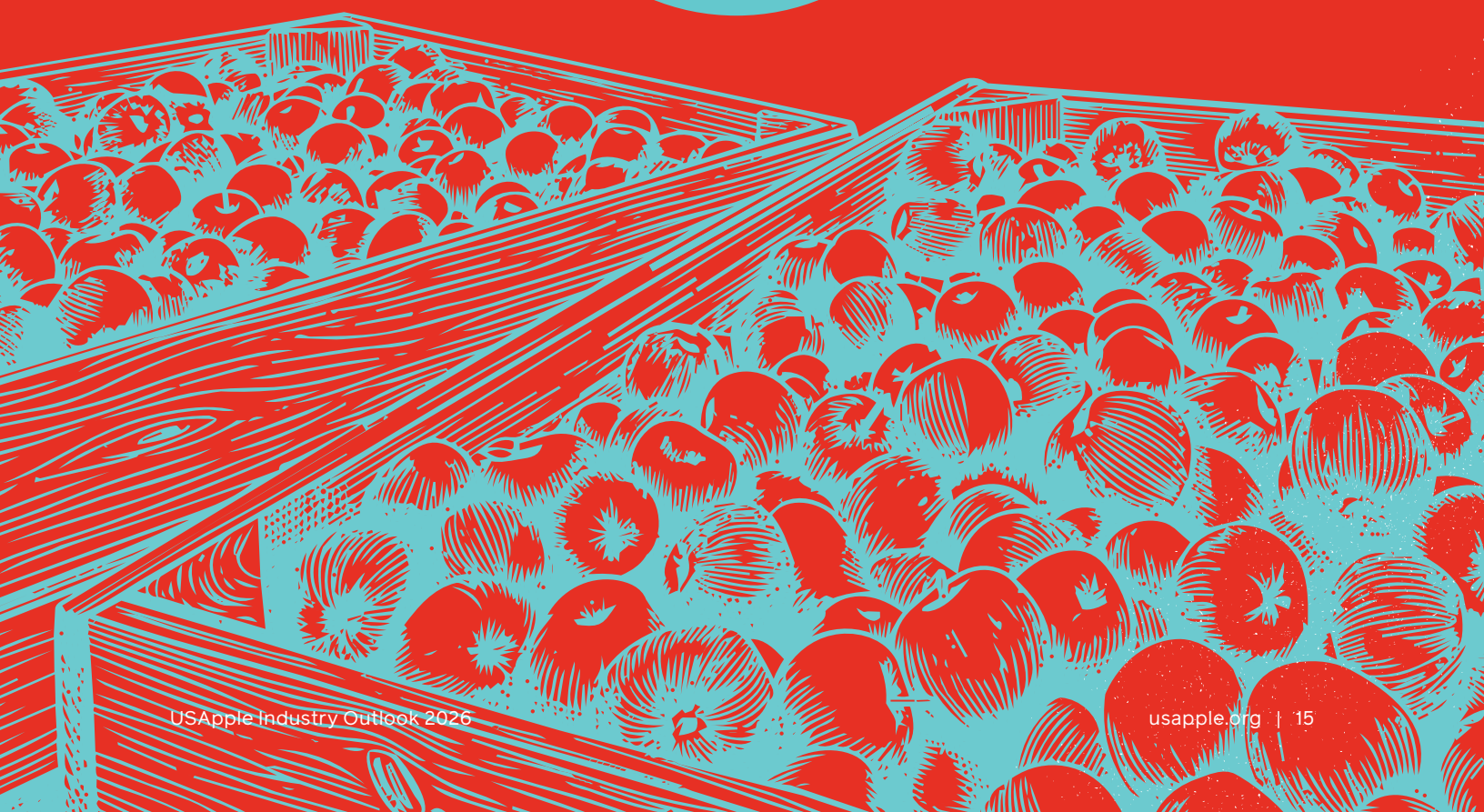
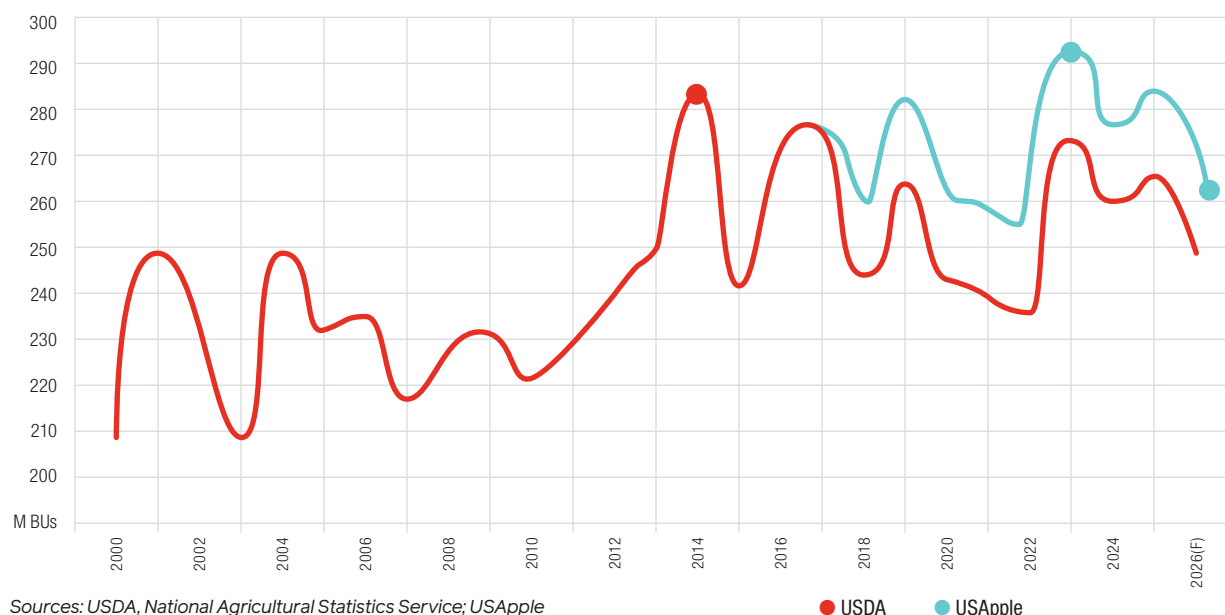


Figure 5: U.S. Apple Production: 2000-2026 (F)



Sources: USDA, National Agricultural Statistics Service; USApple

Notes: Production levels are reported in 42-pound bushels.

Production lines diverge as USApple adds estimated production from "other" states – data that USDA stopped collecting in 2018.

This year's production is 10% below the (unofficial) record 2023/24 season. It is unofficial because, according to USDA, that honor belongs to the 2014/15 season with 282 million bushels.²² However, as noted above, during that season, USDA was still collecting data from at least a dozen additional states including North Carolina, Wisconsin, Ohio and almost all New England. The comparison is not apples to apples, so to speak.

To make a more accurate comparison and truly judge the capacity of U.S. apple growers, USApple has been estimating the missing production from these additional states since the USDA last collected them in 2017. With no new datapoints on which to base assumptions regarding production changes in the intervening years, USApple has had to rely solely on anecdotal accounts.

Fortunately, the Census of Agriculture, released every five years, provides detailed

state-level data on bearing and non-bearing acreage by crop type.²³ The 2022 figures give the industry its first objective glimpse into how these other states have been developing in terms of apple acreage since the last annual surveys were conducted.

By applying 2017 production per acre ratios, USApple estimates that, in the 2023/24 season, an additional 19 million bushels were produced in the states dropped from the annual survey. When added to the 273 million bushels officially counted, the U.S. total climbs to 292 million bushels and becomes the highest producing season in U.S. apple history.

U.S. apple growers didn't get there by luck or by chance – there were a couple of driving forces that made those production volumes inevitable. First, the industry was adding acreage.

²² Each August, USDA releases an estimate of apple production by state for the coming crop year. In 2018, it limited the number of estimates to only the top seven apple producing states: California, Michigan, New York, Oregon, Pennsylvania, Virginia and Washington. This means that, from 2018 onward, USDA's total national production figure only represents a sum of these seven states. Prior to 2018, USDA's total national production figure included data for a far greater number of states – 20 in 2017. In an effort to maintain continuity of the dataset, USApple has estimated production for the "other" states from 2018-2026 and added it back to USDA's national production figures to arrive at a new, more comprehensive USApple production estimate.

²³ The annual survey and five-year Census differ on the definition of acreage. While the Census covers total apple acreage in all 50 states, the annual survey represents only "commercial acreage" defined as "orchards of 100 or more bearing trees" in the top seven apple producing states.

Between 2012 and 2022, more than 26,000 net new acres were planted in just the top seven apple producing states. Second, even if total acreage levels had remained flat, orchards are constantly being renewed as trees die, varieties become less popular, and planting systems become outdated. The five-year Census shows a remarkable consistency in the ratio of bearing to non-bearing (young) orchards going back decades. Those data show that, in any given year, between 10% and 14% of total apple acreage is not yet of bearing age. For both the new and the replanted or grafted acreage, it is reasonable to assume that the density will be at least equal to, though likely far higher than, the farm average, and will thus generate considerably higher yields.

Since 2022, total commercial acreage has been declining in the top apple states. As shown in **Table 4**, more than 5,000 net acres have been removed over the past several years. These net figures may somewhat obscure the picture in Washington where the most recent data show the removal of 3,000 acres from 2024 to 2025.²⁴ The recent time horizon also obscures a longer-term trend in California which has seen a 50% decline in its apple acreage over the last 20 years.

Of course, as noted above, the characteristics of acreage will differ significantly from orchard to orchard and state to state. The age of the trees, density of the planting systems and relevance of the varieties are just a few of the differences that will radically impact the quantity and quality of the apples produced. **Table 4** also highlights the productivity of each state in terms of yield per acre, figures that have generally been increasing even with a loss of acreage.

Among the top apple producing states in 2026/27, Washington is expected to produce around 176 million bushels²⁵, followed by New York with 32 million bushels and Michigan with 25 million bushels. As detailed above, the states that are no longer tracked by USDA still have significant production and rightly should be counted – those “other” states are expected to produce around 15 million bushels. Pennsylvania is expected to produce only 5 million bushels,

Table 4: U.S. Apple Bearing Acreage & Yield

	2025 ACRES	2022-2025 CHANGE	2025 YIELD
United States	296,900	(5,400)	890
Washington	171,000	(2,000)	1,050
New York	46,000	(1,000)	774
Michigan	37,000	(1,000)	685
Pennsylvania	18,500	(1,000)	650
California	10,200	-	440
Virginia	9,600	(200)	370
Oregon	4,600	(200)	826

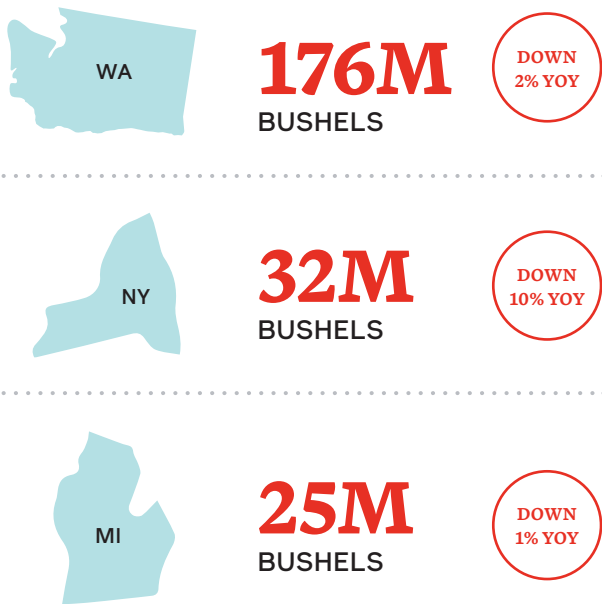
Sources: USDA, National Agricultural Statistics Service; USApple
Notes: U.S. total bearing acres is the sum of the top seven states.
The annual survey figures represent “commercial acreage” defined as “orchards of 100 or more bearing trees.”

²⁴ Washington added 1,000 acres between 2022 and 2023.

²⁵ In prior years, WSTFA has put out their own estimate of fresh apple production. That estimate has historically been used to adjust the USDA figure accordingly based on several factors including more timely information on fruit development and market characteristics impacting harvest potential. For this 2026/27 season, WSTFA has decided that it will not be making any early season estimates but will wait until December to release its first official report on crop size. The lack of adjustment should not be interpreted as either an endorsement or a repudiation of USDA's official figure.

just ahead of California's 4.5 million bushels. Rounding out the top seven states are Oregon with around 4 million bushels and Virginia with less than 2 million bushels. (see **Table 5**).²⁶

With respect to year-over-year changes, Washington's production is expected to drop by 2%, a decline of more than 3 million bushels. Some growers have mentioned isolated pockets of severe hailstorms, but generally the conditions have been good. However, the heat damage that occurred last year happened in late August and early September, so issues may still lie ahead. As



always, it's important to note in Washington that production doesn't automatically equal supply – there is a long harvest season to gauge how many apples the market will bear and it's entirely likely that not every apple will get picked. Elsewhere on the West Coast, Oregon is estimating a season like the previous one with production essentially flat, up just 12,000 bushels. California is also projected to be relatively flat, up just 36,000 bushels.

In the middle of the country, Michigan growers noted a few hail and frost events but didn't expect that to significantly impact the crop. Sizing was also reported to be good and back to the average after drought conditions led to smaller sizes last season. Production there is expected to be down 1% or around 350,000 bushels.

Table 5: U.S. Apple Production, by State

	2026/27 (F)	2025/26	5-YR. AVERAGE
LEVELS			
United States	263,407,070	281,817,359	272,927,907
Washington	176,190,476	179,523,810	169,619,048
New York	32,142,857	35,595,238	33,119,048
Michigan	25,000,000	25,357,143	27,209,524
Pennsylvania	5,000,000	12,023,810	12,080,952
California	4,523,810	4,488,095	4,640,476
Oregon	3,809,524	3,797,619	3,430,952
Virginia	1,833,333	3,547,619	4,790,476
Other	14,907,070	17,484,025	18,037,431
PERCENT CHANGE (VS. 2026/27)			
United States		-7%	-3%
Washington		-2%	4%
New York		-10%	-3%
Michigan		-1%	-8%
Pennsylvania		-58%	-59%
California		1%	-3%
Oregon		0%	11%
Virginia		-48%	-62%
Other		-15%	-17%
MARKET SHARE			
United States	100%	100%	100%
Washington	67%	64%	62%
New York	12%	13%	12%
Michigan	9%	9%	10%
Pennsylvania	2%	4%	4%
California	2%	2%	2%
Oregon	1%	1%	1%
Virginia	1%	1%	2%
Other	6%	6%	7%

Sources: USDA, National Agricultural Statistics Service; USApple
Notes: Production levels are reported in 42-pound bushels.
Five-year averages do not include 2026/27 (F) data.
USDA U.S. total revised to include imputed production from "other" states.
"Other" states' production calculated based on 2022 share of U.S. total and average annual growth rates (less WA).

On the East Coast, a cold weather event in April 2026 is expected to dramatically reduce the size and quality of fruit from that region. The impact was felt most severely in the Mid-Atlantic region between the Shenandoah Valley in Virginia and the Hudson Valley in New York. With much of the area well into bud development and bloom thanks to a warmer

²⁶ USDA, National Agricultural Statistics Service. Crop Production. Released August 12, 2026.



than average spring, the three-day incremental freeze reached sustained temperatures below the 10 to 25-degree thresholds needed to inflict significant damage.

In New York, production is projected to be off by only 10% or 3.5 million bushels as frost conditions were limited to specific regions. As with Michigan, New York growers are reporting that sizing is up from last year after ample rainfall compared with last year's drought conditions. Virginia growers are predicting they will be down by 48% from last year's already low season, dropping by almost 2 million bushels. In Pennsylvania,

unfortunately, production is expected to be down by a staggering 58%, a loss of more than 7 million bushels. For all the other states estimated by USApple, production is likely to be down by around 2.5 million bushels, a decrease of 15%.

In terms of varietal mix, in 2026/27, Galas are expected to hold on to the top spot with around 16% of total U.S. apple production followed by Red Delicious (12%) and Granny Smith (11%). **Table 6** details the expected 2026/27 production by variety and highlights the shifts in composition as compared to the 2025/26 crop and the five-year average.²⁷

Table 6: U.S. Apple Production, by Variety

	2026/27 (F)		2025/26		5-YR. AVERAGE	
Total Varieties	263,407,070		281,817,359		272,927,907	
Gala	41,800,254	16%	43,940,148	16%	47,015,816	17%
Red Delicious	30,407,560	12%	32,384,840	11%	36,956,695	14%
Granny Smith	30,057,354	11%	31,006,098	11%	26,647,977	10%
Honeycrisp	27,151,543	10%	28,083,647	10%	26,843,169	10%
Others	24,787,471	9%	27,338,357	10%	23,368,905	9%
Fuji	23,121,654	9%	24,569,539	9%	25,474,594	9%
Cosmic Crisp®	19,740,215	7%	20,113,679	7%	12,010,851	4%
Pink Lady/Cripps Pink	16,542,914	6%	17,452,551	6%	14,210,547	5%
Golden Delicious	14,162,114	5%	16,254,165	6%	17,765,173	7%
Envy®	7,571,868	3%	7,716,594	3%	6,145,318	2%
Rome	6,620,450	3%	8,046,139	3%	8,632,410	3%
Idared	5,376,302	2%	5,841,352	2%	5,723,323	2%
McIntosh	4,110,454	2%	4,510,981	2%	5,481,788	2%
Empire	3,565,412	1%	3,905,453	1%	4,213,704	2%
Ambrosia	2,364,918	1%	2,528,441	1%	3,115,045	1%
York	1,562,907	1%	3,134,394	1%	4,253,656	2%
Cortland	1,314,991	0%	1,489,967	1%	1,600,793	1%
Mutsu/Crispin	1,061,903	0%	1,189,856	0%	1,146,347	0%
Newtown Pippin	714,312	0%	741,245	0%	647,818	0%
Spartan	568,991	0%	640,448	0%	552,884	0%
Jonathan	549,612	0%	583,398	0%	651,514	0%
Rome Sport	142,818	0%	170,017	0%	202,748	0%
Stayman	111,053	0%	176,050	0%	266,833	0%

Sources: USApple; California Apple Commission; Washington State Tree Fruit Association

Notes: Production levels are reported in 42-pound bushels.

Five-year averages do not include 2026/27 (F) data.

²⁷ The U.S. totals were derived as the sum of the state-level data shown in **Table 7**.

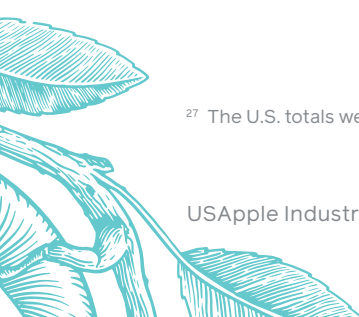




Table 7 details 2026/27 estimated production by variety, by state.²⁸

Table 7: U.S. Apple Production, by Variety, by State

2026/27 (F)	U.S.	CA	MI	NY	OR	PA	VA	WA	OTHER
Total Varieties	263,407,070	4,523,810	25,000,000	32,142,857	3,809,524	5,000,000	1,833,333	176,190,476	14,907,070
Gala	41,800,254	1,662,546	4,808,566	3,370,135	62,183	625,408	54,745	29,903,135	1,313,537
Red Delicious	30,407,560	-	2,426,995	1,611,260	522,135	460,040	260,178	22,487,933	2,639,018
Granny Smith	30,057,354	1,290,458	-	310,626	1,504,229	195,932	48,054	26,027,251	680,803
Honeycrisp	27,151,543	-	2,842,310	1,503,187	298,754	143,582	2,069	21,684,215	677,425
Others	24,787,471	4,430	5,259,572	7,169,791	8,747	876,947	132,952	10,457,750	877,281
Fuji	23,121,654	61,515	2,258,274	1,646,450	791,731	461,543	55,530	16,522,653	1,323,958
Cosmic Crisp®	19,740,215	-	-	-	-	-	-	19,740,215	-
Pink Lady/Cripps Pink	16,542,914	96,955	149,254	420,236	621,745	209,172	132,423	13,839,556	1,073,573
Golden Delicious	14,162,114	758,646	2,245,295	2,099,472	-	702,339	429,057	5,961,241	1,966,065
Envy®	7,571,868	-	-	16,655	-	-	-	7,555,213	-
Rome	6,620,450	-	1,067,489	2,899,719	-	342,391	286,721	-	2,024,131
Idared	5,376,302	-	1,735,886	3,324,372	-	4,022	30,965	-	281,056
McIntosh	4,110,454	-	973,394	2,508,446	-	4,601	3,752	-	620,261
Empire	3,565,412	72,924	811,162	2,365,941	-	12,986	5,763	-	296,636
Ambrosia	2,364,918	-	-	104,525	-	57,786	-	2,011,313	191,294
York	1,562,907	-	-	131,547	-	865,225	320,201	-	245,933
Cortland	1,314,991	-	-	1,099,613	-	3,661	19,846	-	191,871
Mutsu/Crispin	1,061,903	-	-	995,201	-	4,121	5,844	-	56,737
Newtown Pippin	714,312	576,335	-	-	-	1,393	7,760	-	128,824
Spartan	568,991	-	-	468,184	-	1,219	2,942	-	96,647
Jonathan	549,612	-	421,804	56,371	-	7,506	143	-	63,788
Rome Sport	142,818	-	-	33,491	-	3,817	-	-	105,509
Stayman	111,053	-	-	7,636	-	16,307	34,388	-	52,722

Sources: USApple; California Apple Commission; Washington State Tree Fruit Association

Note: Production levels are reported in 42-pound bushels.

In general, the varieties on the rise include Honeycrisp, Granny Smith, Cosmic Crisp® and Pink Lady/Cripps Pink. Fuji and “other” varieties are generally flat since the 2021/22

crop. Varieties on the decline include Gala, Red Delicious, Golden Delicious and Rome. **Figure 6** charts the yearly production growth or decline for select top varieties.

²⁸ For Michigan, New York, Oregon, Pennsylvania, Virginia and Other States, the 2026/27 production values by variety were derived using USApple's state-specific December 1, 2025 storage ratios – the percentage of total storage by variety at that point in time. CAC provided estimates for the fresh varietal shares in California while USApple storage ratios were used to estimate processing varieties for the state. Washington's estimated varietal shares were based on 2025/26 indicated crop levels provided by WSTFA. Users should be aware that estimates made using the December storage shares may tend to undercount certain varieties: on the high end, growers/marketers may want to sell the newer, more valuable varieties quickly and so those may move before the December 1 report; on the low end, processing apples may not be worth the cost of storage and so are moved quickly or may have never gone through storage facilities at all.

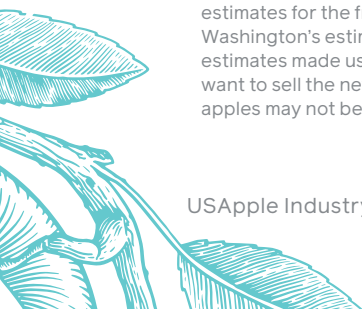
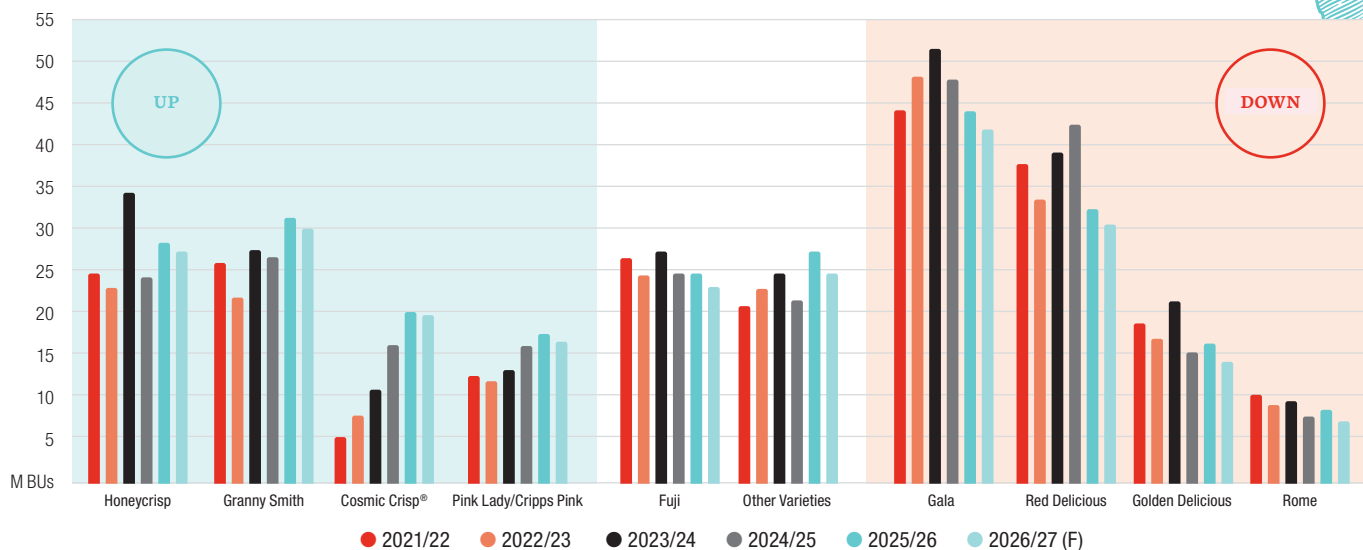


Figure 6: U.S. Apple Production Trends, by Select Varieties



Sources: USApple; California Apple Commission; Washington State Tree Fruit Association

As of August 1, 2026, there were still almost 5 million bushels of Cosmic Crisp® apples remaining in Washington storages. In fact, there are now more Cosmic Crisp® apples in storage than any other variety by some margin – the next most numerous variety is Granny Smith with 3.2 million bushels. As shown in **Table 6** and **Figure 6**, the production of WA 38, the cultivar designation for Cosmic Crisp®, has been climbing steadily since its commercial introduction in 2019. While WA 38 has certainly established itself as a year-round variety, the question is now, how much more can the market bear?

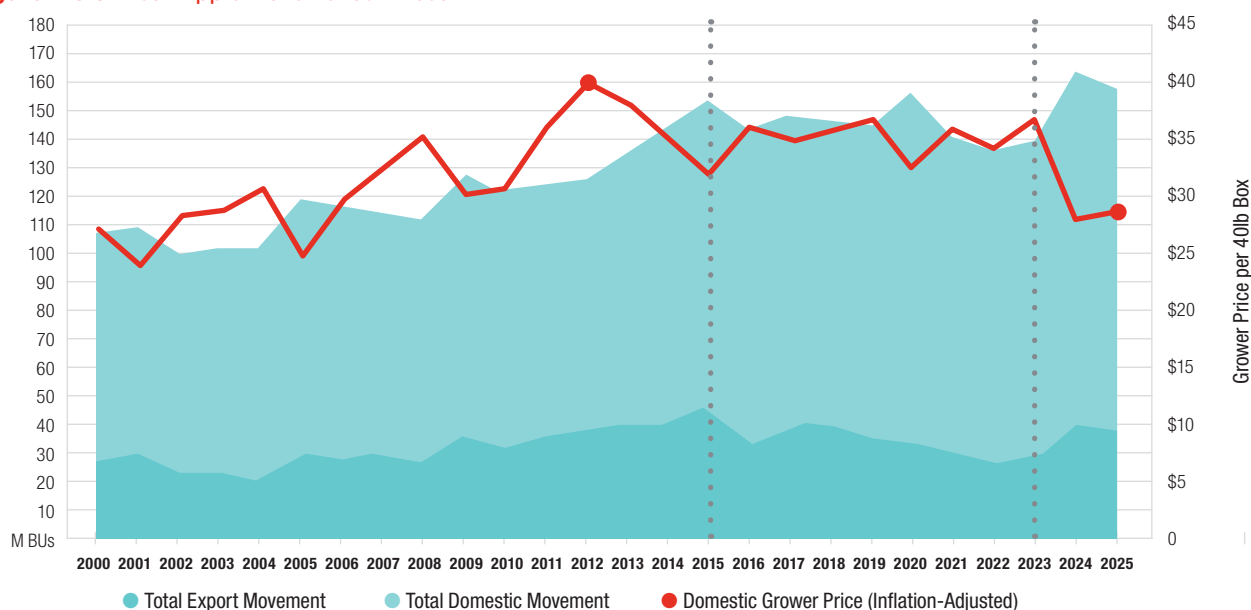
In the current 2025/26 season, Washington has been shipping an average of 1.5 million bushels a month from December to July. The data show around 800,000 bushels of shipments in November 2025, but the majority of those are likely to be from the prior season. WA 38 is harvested in late September and October, but the variety benefits from a conditioning period after harvest to finish converting starches to sugar. This conditioning period, which typically lasts several weeks, is not just recommended, but required by WA 38's brand management company, Proprietary Variety Management (PVM). Parameters for the 2025/26 crop indicated that the Starch Index, a 1 to 6 scale of immature to mature fruit, should be a minimum of 2.0 at harvest and 90% of the fruit must clear 4.5 before they can be packed. For this season, PVM also specified a first ship date of November 17th with recommendations to hold fruit from younger trees until January or February. This strictly managed schedule meant that the new crop wouldn't hit grocery store shelves until December and the 2024/25 crop had to bridge the gap through the late summer and fall.

Given the current 1.5-million-bushel monthly shipment average, the 5 million bushels remaining as of August 1 will conveniently satisfy demand through the first half of November 2026. This shouldn't be surprising; the average monthly movement is really just simple arithmetic based on initial inventory – November storage levels divided by 12. If the apples are produced, they have to move. The question then remains; can the market handle tens or hundreds of thousands more bushels per month of WA 38 as production hits its peak over the next few seasons? USDA briefly collected data for Cosmic Crisp® grower prices, but unfortunately has discontinued that series, so it's difficult to tell the extent to which heavily discounted pricing is being used to entice retail adoption. From the 12 months of data that do exist, it appears that has been the case with average prices below WSU's estimated \$30 per box cost of production. Time will tell.



**CORE
INSIGHTS**

Figure 7: U.S. Fresh Apple Movement & Prices



Sources: USDA, Agricultural Marketing Service; USApple

Note: This is a stacked area chart where total fresh apple movement is represented as the sum of domestic movement and exports.

Supply levels are, of course, a key determinant of grower prices. The remainder of this section will focus on how supply and prices are linked and attempts to generally identify the point at which production, given existing levels of domestic and foreign demand, becomes unsustainable. That is, the point at which average grower returns fall below the costs of production.

Between the 2000/01 and 2014/15 seasons, total fresh apple movement – the sum of domestic shipments and exports – was growing steadily, increasing from around 100 million bushels to more than 150 million bushels. It was during this period that U.S. apple exporters started to rapidly expand existing markets like Mexico and Canada and open new markets like India and Viet Nam. Over those 15 years, apple exports grew by 66%, peaking in 2015 at around 47 million bushels, accounting for 30% of total fresh movement (see **Figure 7**).

During this growth period, the export markets effectively served as a pressure relief valve in years of above-average production. This can be seen in the corresponding peaks of the movement datasets in 2005, 2009 and 2015. Of course, not all that growth was absorbed by the export markets. During the 15-year stretch, domestic fresh apple movement was also on the rise, increasing by 33%.

Despite occasional and short-term discounts, this period was marked by steadily rising prices, peaking at an average of \$40 per box in 2012, the year Michigan lost upwards of 90% of their crop to an early bloom and late frost.²⁹ In these halcyon days of the 2000s and early 2010s, the industry was in a virtuous cycle where growth in supply was accommodated by growth in demand and prices rose, thereby justifying further growth in supply.³⁰ But these days couldn't last forever.

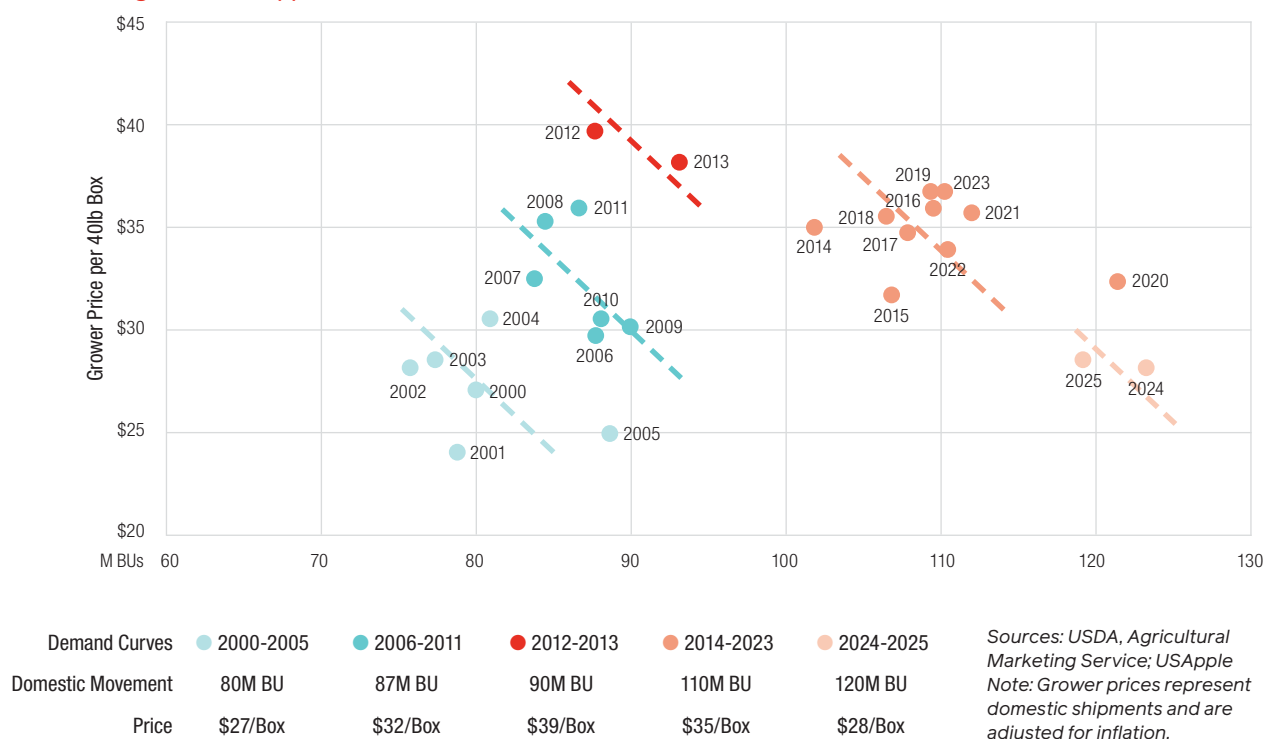
From 2013 to 2023, fresh apple prices plateaued, averaging around \$35 per box. Total movement also flattened out, averaging around 145 million bushels per year. However, something significant had changed between 2015 and 2020 – exports. As noted previously, when production jumped in 2015, exports also increased as shown in the corresponding peaks in movement in **Figure 7**. In 2020, when production surged, there was no matching peak in exports – domestic movement alone was left to absorb the shock.

Unfortunately, during this period, it's not just that exports ceased functioning as a pressure relief valve, but they started to decrease in absolute terms. By 2022, total fresh apple exports were down to 27 million bushels from

²⁹ The \$40 per box figure is an average of all the varieties tracked by USDA. Some varieties, like Honeycrisp, commanded significantly higher prices topping out at around \$100 per box in 2012.

³⁰ The period was also one marked by historically low interest rates following the 2008 financial crisis. The record high prices along with the near-zero cost of debt spurred growers and private equity backers to make significant investments in their operations, planting new, higher-density orchards, building state-of-the-art storage facilities, and upgrading packing lines.

Figure 8: U.S. Apple Demand Curves: 2000-2025



a high of 47 million bushels in 2015 – a 42% decrease. In that short period, exports went from accounting for 30% of total movement to just 20%, putting significant pressure on domestic markets to make up the difference.

In 2024, with production levels at all-time highs, total fresh apple movement exceeded 164 million bushels and prices crashed to around \$28 per box. The following year in 2025, it happened again. Total movement volumes were around 158 million bushels and grower prices stayed below \$29 per box.

As noted above, a 2024 WSU study found that a minimum of around \$30 per box is needed to cover just the variable costs for most varieties. For Honeycrisps that figure is around \$43.50 per box. Using those benchmarks, we can back into an approximate total fresh apple movement figure that remains economically viable. Based on the current levels of domestic consumption and exports, it seems that fresh movement (i.e. commercial wholesale shipments) of around 160 million bushels decreases the prices paid to growers below the cost of production for most varieties.

Setting aside exports for a moment, **Figure 8** details the evolution of domestic fresh apple movement and grower prices by year. The scatter plot groups years based on similar demand curves: 2000-2005; 2006-2011; 2012-2013; 2014-2023; and 2024-2025.

As described above, for most of the 2000s, prices continued to rise as domestic movement increased moderately from around 80 to 90 million bushels. Prices peaked in 2012 and 2013 with the loss of Michigan's crop and then changed trajectory in the following decade as domestic movement jumped to the 100-to-110-million-bushel range. At those levels, the average grower prices cluster around \$35 per box which is enough to cover most the cost of growing, storing and packing most varieties, but not all. In the most recent shift with domestic shipments at or above 120 million bushels, the average prices paid to growers drop below the \$30 break-even threshold for almost all fresh varieties.³¹

While much of the analysis above has focused on the fresh market, a significant portion of U.S. apples go to processing every year. The following section takes a closer look at apple utilization in the U.S., providing additional detail at the state and varietal levels.

³¹ Although the average inflation-adjusted price per box was lower in the early 2000s compared to 2025, the returns a grower could expect 25 years ago were far higher given the significantly lower cost of labor and other inputs.

U.S. APPLE UTILIZATION

The ratio of fresh to processing apples has remained remarkably consistent over the last 15 years, at least. Fresh apples account for around 67% of total production while processors make up roughly 30%. The remaining 3% of apples go unsold every year.³²

At the state level, the ratios of fresh to processing apples can vary dramatically. In Washington, 75% of the crop goes towards the fresh market with 20% going to processing and the remainder being left unsold. This has been the case for the last decade as the sheer magnitude of their crop makes big swings in the utilization ratios less likely. At the other end of the spectrum, only 25% of California's 2025/26 crop was utilized as fresh.

67%
FRESH

³² USDA, National Agricultural Statistics Service. Production, Utilization, Bearing Acres: 2021-2025.





In New York, 42% of the most recent crop went towards fresh versus 55% in 2023/24. It's unlikely that this is a structural shift but rather the result of difficult growing conditions and unfortunate weather events. In Michigan, 47% of 2025/26 apples qualified as fresh roughly on par with their five-year average. Pennsylvania has also been consistent with 46% of their apples going to the fresh market, two percentage points above the five-year average.

Oregon and Virginia were unique in the 2025/26 reporting from USDA as both states had their fresh and processing production data suppressed. Prior to the missing datapoint, fresh production dominated in Oregon with five-year average utilization shares split 87% fresh and 13% processing. In Virginia, growers there were making dramatic moves towards the fresh market, increasing from just 30% fresh in the 2021/22 crop year to 56% fresh in 2024/25, the last recorded season.

In terms of market share, Washington continues to lead the U.S. in production for both fresh and processing apples. In 2026/27, it is expected that the state will be responsible for 76% of the

fresh apples and 44% of the processing apples grown in the U.S. **Table 8** details projected utilization levels, shares of production and shares of use by state.

Just as the utilization shares vary by state, so too do they vary by type. As shown in **Table 9**, a number of apple varieties like Gala, Fuji and Granny Smith, for example, are primarily utilized as fresh while other varieties like Idared, Rome and York are primarily utilized for processing.³⁴ As discussed above, U.S. growers have been steadily replacing processing blocks with fresh apples as older orchards and varieties age out. With the value of fresh apples being so much higher than processors, fewer growers are focusing on this important segment of the market. At some point, one would expect some economic signals from domestic processors reliant on a dwindling supply. Whether it is this decline in dedicated processing fruit at home, the impact of tariffs on the cost of foreign processed apple products, or simply natural cycles in processing apple procurement, over the past two seasons, U.S. processors have begun sending signals and the price of processing fruit has been on the rise.

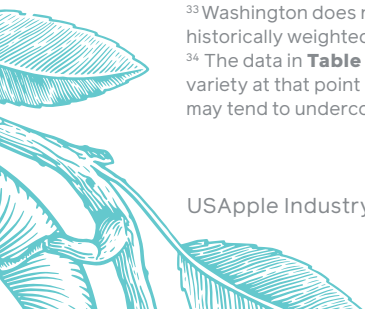


In the 2025/26 crop year, only 65% of all U.S. apples went to the fresh market, a sign of just how much the industry struggled with quality issues this season. In USApple's November 2025 storage report, the first of the season, Washington indicated fresh holdings of 115 million bushels and processing holdings of 35 million bushels. The following month, Washington reported fresh holdings of 99 million bushels and 39 million bushels of processing apples.³³

The change in storages from November to December is challenging to interpret in any year given that late-season varieties are still coming into the shed while shipments are going out. In this case, the net month-over-month change made it appear that 16 million bushels (or more) of fresh apples had been shipped while 4 million bushels (or more) of late-season processing apples had come in. The truth was that, as Washington began packing fruit in November, they quickly realized that the quality was far lower than was expected or was typical and revised their season's packout ratios downward. By December, the state was estimating that they would get 0.9 fewer packs per bin (PPB) for Honeycrisp; 0.6 fewer PPB for Granny Smith; 0.5 fewer PPB for Red Delicious; and 0.4 fewer PPB for Gala. In one month alone, the adjustment moved 5 million bushels from the fresh side of the ledger to the processing side and was a major recalibration that took the state from being long in some varieties to potentially being short.

³³ Washington does not grow specifically for the processing market. To provide USApple with processing storage data, WSTFA applies historically weighted packout ratios to their fresh holdings to arrive at an expected utilization distribution.

³⁴ The data in **Table 9** were derived using USApple's December 1, 2021-2025 average storage ratios – the percentage of total storage by variety at that point in time. Just as with **Tables 6 and 7**, users should be aware that estimates made using the December storage shares may tend to undercount certain varieties at the high- or low-end of the spectrum.





It is important to note, however, that not all processing apples or regions are created equally. In Washington, where they don't intentionally grow for the processing market, there are generally two distinct types: peelers and juicers. The peelers, typically used to make apple slices, are of a higher grade and would have made it to the fresh market except for a minor external blemish. Juicing apples on the other hand are a byproduct of fresh apple production – apples that went bad in storage and never had a chance at making it to grocery store shelves.

Beginning in the fall of 2025, the price of processing apples in Washington began to tick up. Again, while it's difficult to tie this to any

one factor – domestic supply issues, import tariffs, or procurement cycles – the effects have been significant. Over the course of the 2024/25 season, peeler prices increased by 65%, rising from \$0.05 per pound to \$0.08 per pound. The growth in the price of juicing apples was even more pronounced, moving from just \$0.02 per pound to \$0.07 per pound, an astounding 329% increase.

Those gains have slowed in the 2025/26 season with Washington peeler prices first falling before closing the season up \$0.01 per pound. The same pattern was observed with juicer prices that ended up \$0.02 per pound year over year (see **Figure 9**).

Table 8: U.S. Apple Utilization, by State

2026/27 (F)	UTILIZATION	% OF STATE PRODUCTION	% OF NATIONAL USE TYPE
FRESH			
United States	174,637,423	66%	
Washington	132,847,619	75%	76%
New York	15,454,265	48%	9%
Michigan	12,350,441	49%	7%
Pennsylvania	2,223,383	44%	1%
California	971,825	21%	1%
Oregon	3,308,173	87%	2%
Virginia	872,554	48%	0%
Other	6,609,164	44%	4%
PROCESSING			
United States	80,832,743	31%	
Washington	35,942,857	20%	44%
New York	16,483,025	51%	20%
Michigan	12,485,146	50%	15%
Pennsylvania	2,750,261	55%	3%
California	3,525,723	78%	4%
Oregon	478,352	13%	1%
Virginia	952,093	52%	1%
Other	8,215,285	55%	10%

Sources: USDA, National Agricultural Statistics Service; USApple Notes: Utilization levels are reported in 42-pound bushels. Fresh and processing production shares are based on five-year averages: 2021-2025. The sum of fresh, processing and not sold apples equals total production.

Table 9: U.S. Apple Utilization, by Variety

2022-2026 AVERAGE	FRESH	PROCESSING
Total Varieties	70%	30%
Ambrosia	76%	24%
Cortland	34%	66%
Cosmic Crisp®	79%	21%
Empire	62%	38%
Envy®	80%	20%
Fuji	80%	20%
Gala	81%	19%
Golden Delicious	50%	50%
Granny Smith	77%	23%
Honeycrisp	58%	42%
Idared	4%	96%
Jonathan	31%	69%
McIntosh	55%	45%
Mutsu/Crispin	10%	90%
Newtown Pippin	36%	64%
Pink Lady/Cripps Pink	81%	19%
Red Delicious	82%	18%
Rome	5%	95%
Rome Sport	50%	50%
Spartan	78%	22%
Stayman	23%	77%
York	3%	97%
Others	65%	35%

Source: USApple Note: Shares do not match those in **Table 8** as December storages are inclusive of "not sold" apples.

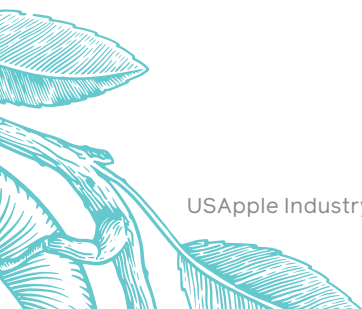
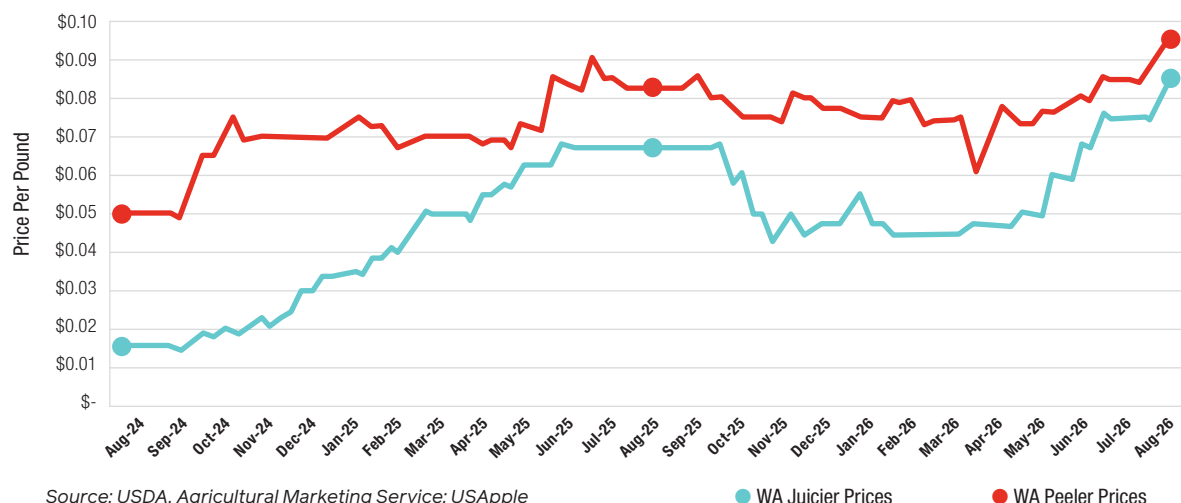


Figure 9: Washington Processing Apple Prices



Source: USDA, Agricultural Marketing Service; USApple

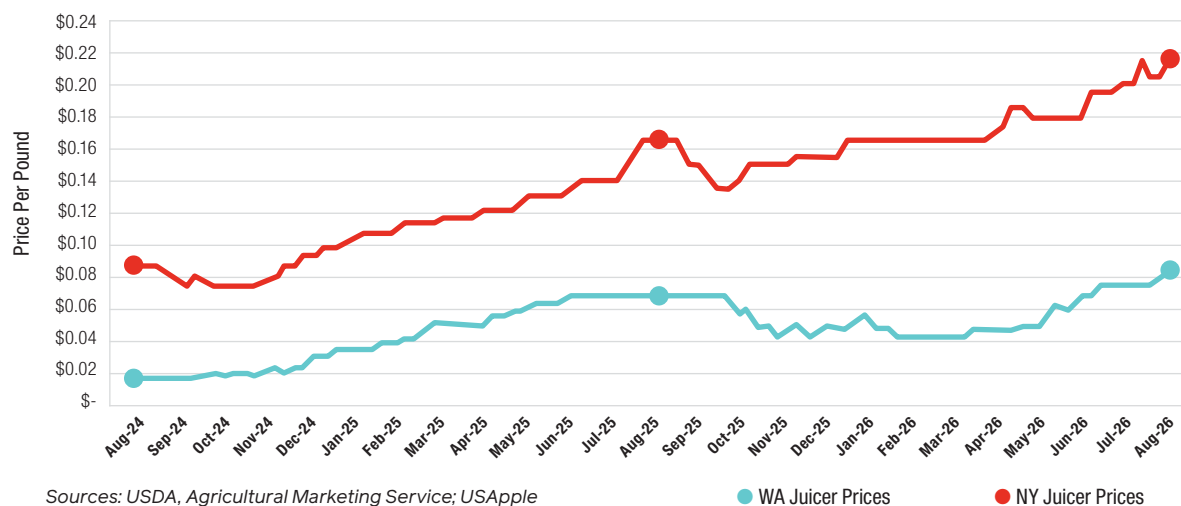
But even at those elevated levels, Washington is envious of the prices being paid to many East Coast growers. Over the course of the 2024/25 season, the price of New York juice apples rose from \$0.09 per pound to \$0.17 per pound, a 94% increase. In the 2025/26 season, New York also saw an immediate drop in prices before quickly rebounding to end the season at \$0.22 per pound, gaining an additional 30% (see **Figure 10**).

Another major processed apple product is, of course, apple juice concentrate (AJC), which, while made from juice apples, is not manufactured in great abundance in the U.S.³⁵ The relatively small quantities that are produced are used almost exclusively in beverages that are, either for marketing or government procurement purposes, able to claim 100% domestic sourcing. Ultimately, it is simply

not possible to make all the AJC required for domestic needs – nor would it be economically feasible. In mid-April 2026, the most recent period for which there were enough sales transactions to record data, domestic AJC prices were listed between \$13.31 and \$27.00 per gallon. This compares with \$10.37 to \$12.10 per gallon from South America; \$10.45 to \$12.05 per gallon from China; \$11.00 to \$11.30 per gallon from Europe; and \$11.25 to \$12.00 per gallon from Türkiye.³⁶

Given these significant price disparities, it is no wonder the U.S. is a net importer of AJC and likely will be for some time to come. The following section examines U.S. apple and apple-related imports and exports, detailing how they have changed over time and what that means for the balance of trade.

Figure 10: U.S. Regional Juice Apple Prices



Sources: USDA, Agricultural Marketing Service; USApple

³⁵ Next to juice and cider, the next largest category of processing apples is “canners” – apples that are predominantly utilized to make applesauce. Unfortunately, comprehensive USDA data on both volume and value for all processed apple utilization types including dried, frozen, and fresh apple slices were discontinued in 2017.

³⁶ USDA, Agricultural Marketing Service. National Apple Processing Report: July 16, 2026.

U.S. APPLE TRADE

According to USDA trade data, fresh apple exports totaled almost 45 million bushels in 2025/26 (July to June). This is around 800,000 bushels more than 2024/25 export levels – a 2% year-over-year increase. During the same period, fresh apple imports declined by 550,000 bushels, a 12% decrease. The joint effects of rising exports and falling imports caused the fresh apple balance of trade to grow to almost 41 million bushels.³⁷



44+
MILLION BUSHELS
EXPORTED

³⁷ USDA, Foreign Agricultural Service. Global Agricultural Trade System: Apple Exports & Imports: January 2023–June 2025.

Valued at more than \$1.1 billion, 21% of the exported apples were certified organic with the remaining 79% being conventional or non-organic. The value of the imports – 17% organic and 83% conventional – was around \$121 million, leading to a fresh apple trade surplus of more than a billion dollars (see **Table 10**).

However, it should be noted that, just because U.S. growers ship fruit abroad, it doesn't necessarily mean that they are making a profit. In many cases, exporters sell at a loss in the hope of opening markets for larger, more profitable shipments in the future. Or, selling at discounted prices may be a way to keep foreign buyers happy at a time when the U.S. has plenty of fresh apples to go around. After all, every apple that goes abroad is one less to compete against here at home. Taken as a whole, the average price per bushel for U.S. exports in the 2025/26 season was \$25.65 while imports were averaging \$30.42 per bushel.

The bright spots for exports this season were certainly Mexico and Canada with volumes increasing by 12% and 20% respectively. The

combined value of these two markets was almost \$650 million. While this is an encouraging sign, it is also an existential concern as the current Administration declined to agree to a 16-year extension of the United States-Mexico-Canada Agreement (USMCA) in its current form, opting instead for annual joint reviews. Fortunately, this action leaves the USMCA intact for now, but it introduces considerable uncertainty regarding future relationships with these critical trading partners.

To make matters more concerning, the Administration has also announced that, effective August 19, 2026, it will impose 50% tariffs on hundreds of Canadian imports. Thankfully, fruits and vegetables remain exempt for now, but these duties are being applied under Section 338 that is generally broad and would supersede USMCA exemptions should additional products be added to the list. Negotiators are already hard at work trying to avoid a new and costly trade war, but should these policies go into effect, the Canadians have already showed their willingness to retaliate against U.S. products through boycotts and tariffs of their own.

Table 10: U.S. Fresh Apple Trade

	2025/26	2024/25	YR-OVER-YR % CHANGE	2025/26 \$	2025/26 \$/ BU
Total U.S. Exports	44,894,714	44,105,601	2%	\$1,151,481,000	\$25.65
Conventional Exports	35,476,031	35,328,710	0%	\$892,090,000	\$25.15
Organic Exports	9,418,672	8,776,886	7%	\$259,392,000	\$27.54
Mexico	17,547,552	15,622,378	12%	\$466,225,000	\$26.57
Canada	8,311,260	6,941,120	20%	\$177,697,000	\$21.38
Taiwan	3,310,515	3,439,212	-4%	\$89,592,000	\$27.06
Viet Nam	2,034,019	2,569,947	-21%	\$60,645,000	\$29.82
Dominican Republic	1,520,133	1,491,000	2%	\$39,546,000	\$26.01
India	1,298,075	2,151,788	-40%	\$29,753,000	\$22.92
Guatemala	1,153,363	1,419,208	-19%	\$26,923,000	\$23.34
Hong Kong	868,526	962,038	-10%	\$22,000,000	\$25.33
Peru	867,723	701,678	24%	\$24,474,000	\$28.20
Colombia	839,839	787,947	7%	\$19,929,000	\$23.73
Other (50)	7,143,709	8,019,284	-11%	\$194,697,000	\$27.25
Total U.S. Imports	3,991,638	4,540,263	-12%	\$121,411,000	\$30.42
Conventional Imports	3,295,046	3,775,443	-13%	\$95,734,000	\$29.05
Organic Imports	696,597	764,819	-9%	\$25,682,000	\$36.87
Chile	1,830,307	1,693,474	8%	\$59,380,000	\$32.44
Canada	1,091,339	1,606,617	-32%	\$25,443,000	\$23.31
New Zealand	863,518	1,022,660	-16%	\$32,638,000	\$37.80
China	107,008	127,600	-16%	\$1,324,000	\$12.37
Argentina	72,721	76,705	-5%	\$1,447,000	\$19.90
Other (5)	26,744	13,207	103%	\$1,179,000	\$44.08
U.S. Balance of Trade	40,903,076	39,565,339	3%	\$1,030,070,000	
Conventional Balance of Trade	32,180,985	31,553,267	2%	\$796,356,000	
Organic Balance of Trade	8,722,075	8,012,067	9%	\$233,710,000	

Sources: USDA, Foreign Agricultural Service; USApple
Notes: Trade levels are reported in 42-pound bushels.



Ironically, the Administration's recent announcement of Section 338 tariffs on Canadian goods – tariffs designed to combat foreign discrimination against U.S. commerce – were largely enabled by the Administration's first round of "Liberation Day" tariffs that used the International Emergency Economic Powers Act (IEEPA), later deemed to be unconstitutional by the Supreme Court. Included in the list of grievances justifying the use of Section 338 tariffs were the retaliatory Canadian tariffs on U.S. vehicles and the boycotts of U.S. alcohol in provincial stores, actions taken only after the implementation of IEEPA tariffs.

But alcohol was not the only U.S. product shunned by Canadians. In response to President Trump's February 2025 remarks on Canada becoming the 51st state, fresh apple exports to Canada took a sudden and unexpected hit as a "buy Canadian" sentiment took hold. February 2025 exports fell 9% by value compared to the previous year; March sales were off by 6%; April was down 17%; and May ended up down 6%. All told, the thankfully short-lived show of Canadian solidarity cost U.S. apple growers \$5.7 million in lost sales.

At this tense time, it is important to remember that the U.S. is not the only global source for fresh apples. Apart from producing their own quality fruit, Canada brings in apples from New Zealand, Chile, China, and South Africa, among others. Those countries have plenty of apples and would love an opportunity to get their foot further into the Canadian door. That would be a disaster for not just U.S. apple exporters, but for the industry at large as we rely on Canada each year to take an amount roughly equivalent to Pennsylvania's total annual production.

The U.S. apple industry needs no reminders when it comes to the devastating impacts of retaliatory tariffs. In 2018, during this Administration's first term, Section 232 tariffs were applied to India's steel and aluminum imports. India responded by instituting their own tariffs on imported U.S. apples and crashed a market that took a decade to build. India went from the second largest U.S. fresh apple export market to near zero in a few short years, costing U.S. growers an estimated \$650 million in lost sales.

Worse still, in our absence, Türkiye and Iran stepped in to fill the void. Prior to the trade dispute, Iran and Türkiye combined were

responsible for 7% of India's fresh apple imports. By 2022, those countries controlled 48% of the market. Fortunately, just prior to the 2023/24 crop, India announced that it would be rolling back those tariffs and U.S. apple exporters got to work picking up the pieces. Those efforts have paid off as shown in **Table 10** with 2025/26 exports to India nearing \$30 million. But that is a far cry from the \$157 million in annual sales apple growers were making before the tariffs. At any time, but particularly now, the U.S. apple industry can ill afford to give up our second-largest export market through rash and ill-conceived trade policies.

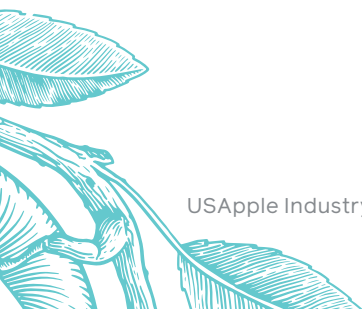
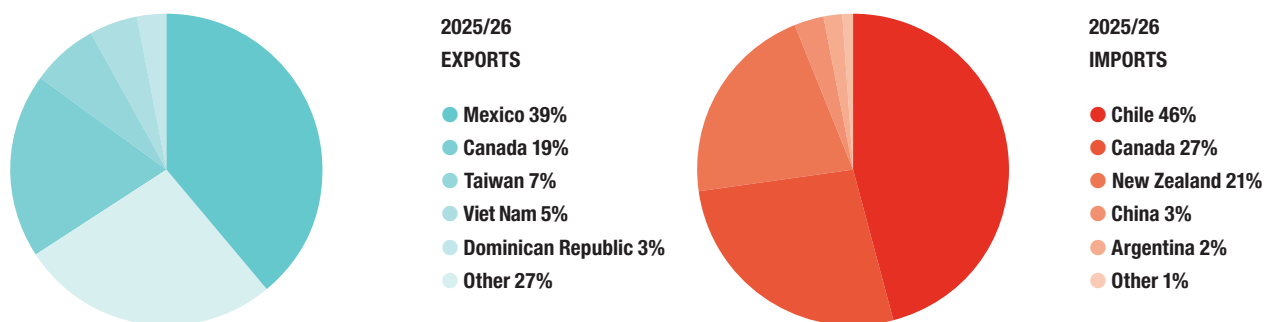


Figure 11: U.S. Fresh Apple Trading Partners



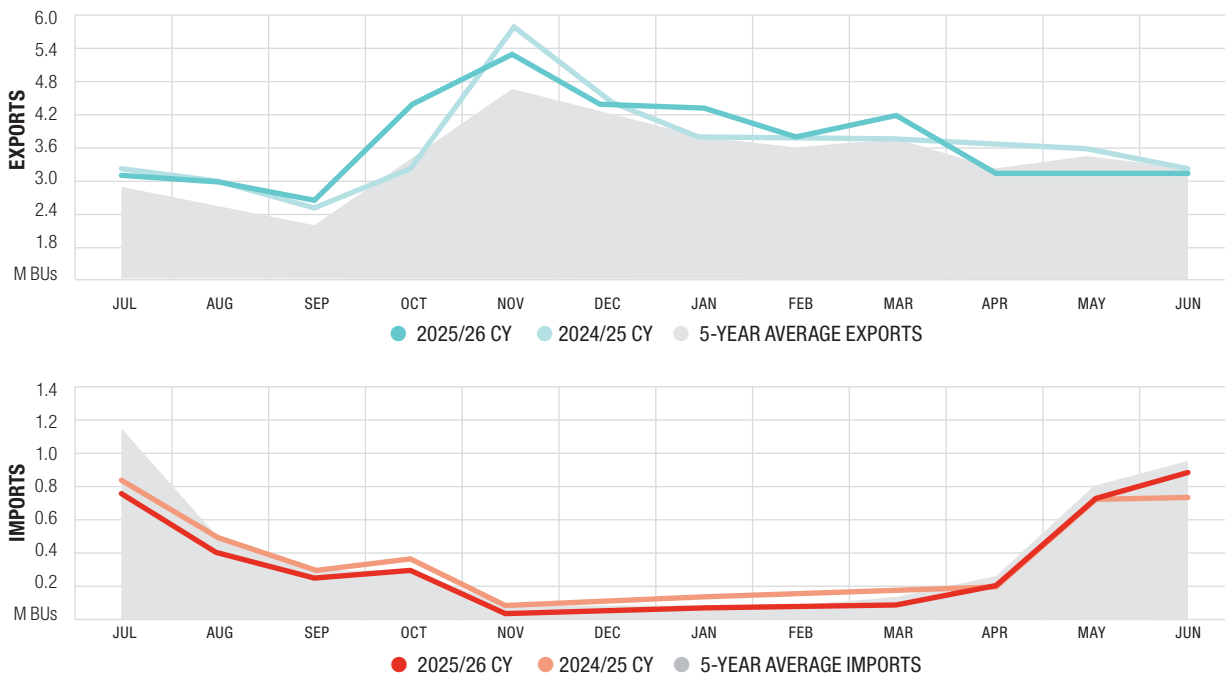
Sources: USDA, Foreign Agricultural Service; USApple

Figure 11 highlights the primary export and import markets for U.S. apples in the 2025/26 crop year.

On a monthly basis, 2025/26 fresh apple exports started the season strong posting excellent October numbers and staying above the five-year average through April 2026. On the import side, the counter-seasonal cadence was similar to the trend, but a bit muted (see **Figure 12**).

It may seem counterintuitive to have fresh apple imports in a market where supply already exceeds demand, but there are always varietal fluctuations and pressure from the retailers to ensure year-round supply. While fresh apple imports are certainly important and should be protected from tariffs, they are still relatively insignificant next to juice and juice concentrate imports.

Figure 12: U.S. Monthly Fresh Apple Trade



Sources: USDA, Foreign Agricultural Service; USApple



Table 11: U.S. Apple Juice & Concentrate Trade

	2025	2024	YR-OVER-YR % CHANGE
Total U.S. Imports	\$664,523,000	\$687,653,000	-3%
Türkiye	\$272,526,000	\$283,825,000	-4%
China	\$139,270,000	\$151,159,000	-8%
Canada	\$36,805,000	\$16,170,000	128%
Chile	\$32,703,000	\$30,554,000	7%
South Africa	\$32,166,000	\$27,095,000	19%
Ukraine	\$28,766,000	\$49,362,000	-42%
Argentina	\$28,547,000	\$20,207,000	41%
Spain	\$23,911,000	\$22,067,000	8%
Italy	\$19,413,000	\$13,804,000	41%
Poland	\$16,925,000	\$12,238,000	38%
All Others (54)	\$33,491,000	\$61,172,000	-45%
Total U.S. Exports	\$61,108,000	\$67,257,000	-9%
Canada	\$24,639,000	\$24,205,000	2%
Dominican Republic	\$21,080,000	\$23,206,000	-9%
Jamaica	\$3,415,000	\$2,822,000	21%
Mexico	\$2,185,000	\$2,471,000	-12%
South Korea	\$1,511,000	\$3,095,000	-51%
All Others (50)	\$8,278,000	\$11,458,000	-28%
U.S. Balance of Trade	(\$63,415,000)	(\$62,396,000)	-3%

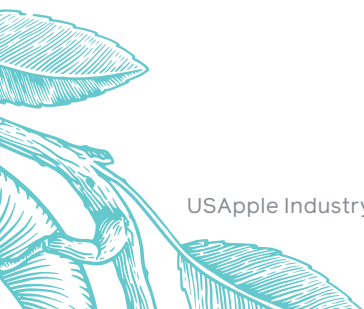
Sources: USDA, Foreign Agricultural Service; USApple

In 2025, the U.S. imported more than \$500 million in apple juice concentrate (AJC); \$27 million in frozen AJC; and \$134 million in single-strength apple juice – totaling around \$665 million. Türkiye continued to be the largest source of U.S. AJC in 2025, supplying 41% of imported juice and juice concentrate. China was the second largest supplier, providing 21% of U.S. juice imports. The 42% year over year decline in juice imports from Ukraine are likely directly related to the ongoing conflict there. On the juice export side, U.S. processors don't really compete as there is not a great deal of excess capacity. In 2025, the U.S. only exported around \$61 million in juice and concentrate resulting in a massive negative balance of trade

valued at more than \$600 million. Canada and the Dominican Republic alone were responsible for buying 75% of U.S. juice exports for almost \$50 million (see **Table 11**).

For additional details on U.S. apple juice and juice concentrate import trading partners, see **Appendix A**.

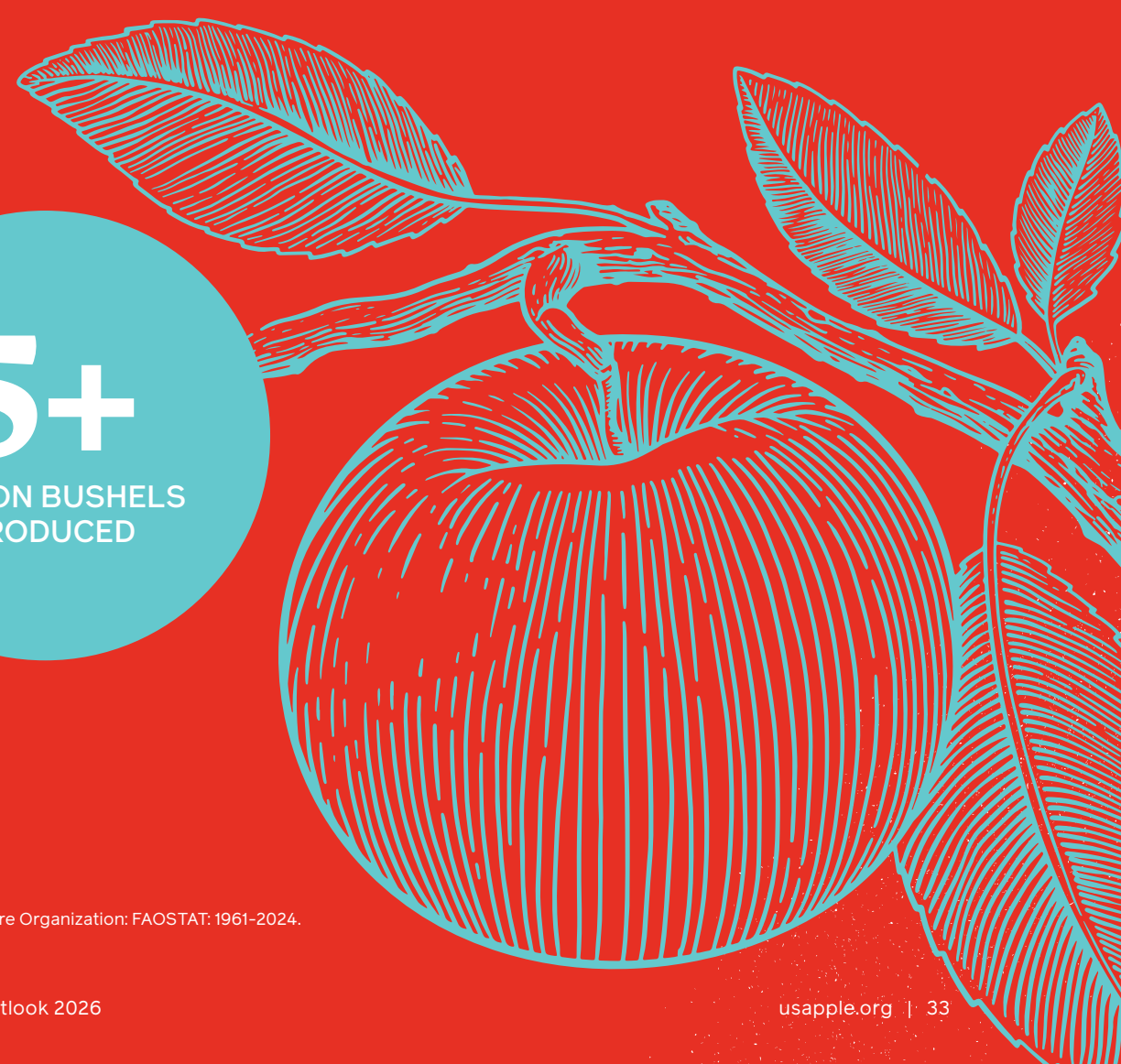
The following section explores global apple production more closely, highlighting a number of international 2026/27 apple crop forecasts and completing the picture of worldwide apple supply in the year to come.



GLOBAL APPLE PRODUCTION

According to United Nations (UN) data, worldwide apple production topped 5.1 billion bushels in 2024 (the latest available datapoint). These 215 billion pounds of apples were grown on more than 11 million acres (18,000 square miles) resulting in an average yield of around 450 bushels per acre.³⁸

Over the course of the 60 years for which the UN has data, production has been increasing continuously with an average annual growth rate of 3%. Despite the production increases, the global number of acres harvested reached its pinnacle in 1995. As a result, global average apple yield has been rapidly increasing since that time. From 1995 to 2024, apple production has doubled while acres harvested has fallen by 26% and average yield has increased by 170% to more than 440 bushels per acre.

A detailed line drawing of an apple branch with several leaves and a large, textured apple. The branch enters from the left and curves upwards and to the right. The apple is large and round, with a stem and a small leaf at the top. The leaves are elongated with serrated edges. The entire illustration is rendered in a dark blue line-art style.

5+

BILLION BUSHELS
PRODUCED

³⁸ UN, Food and Agriculture Organization: FAOSTAT: 1961-2024.



In 2024, China alone was responsible for producing 2.7 billion bushels, more than half of the world's total supply. At number two, was the U.S. followed by Türkiye, Poland and India. A complete list of apple production by country is shown in **Appendix B**.

In terms of area harvested, China still tops the list at more than 5 million acres. By this metric, the U.S. falls to seventh in the world with around 300,000 acres. India takes the number two spot with more than 750,000 acres, followed by Russia (470,000 acres), Türkiye (409,000 acres) and Poland (366,000 acres).

Compared to India, in 2024, the U.S. farmed on 60% less land and produced 87% more apples with substantially better yields. India's yields are around 183 bushels per acre versus in the U.S. where the industry is around 863 bushels to the acre. By this measure, the U.S. also ranks seventh in the world. New Zealand tops the list at 1,283 bushels per acre with Switzerland, Chile, Italy, and South Africa in the top five. For reference, the global average is 444 bushels per acre.

The remaining portion of this section provides details on the 2026/27 crop production forecasts for select countries and regions.

CHINA

According to the World Apple and Pear Association (WAPA) via CFNA, the Chinese Chamber of Commerce for Foodstuffs, China's 2026/27 production is estimated to be up 1% to 1.8 billion bushels. However, a December 2025 report from USDA's Foreign Agricultural Service puts the 2025/26 figure around 2.5 billion bushels, which they say was a year-over-year decrease of 5%.³⁹ To put that modest decline into perspective, it's equivalent to around half of total U.S. production.

The WAPA report notes that CFNA has been the source of its production data since 2021. With no insight into how those figures are being derived,

it's difficult to say with certainty that they are too low. It's possible that, like Washington's reporting standards, they only represent the fresh crop as they are around 75% of the USDA estimates. Data from the UN seem to support the larger USDA figures, with the latest figures putting 2024/25 production at around 2.7 billion bushels.

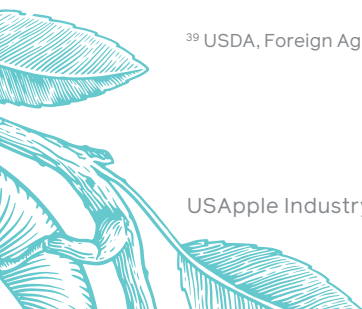
Despite robust production, the USDA report indicates that Chinese apple acreage continues to decline given that "[t]he national farmland policy prohibits the replanting of fruit trees on basic farmland once old trees are removed, requiring farmers to plant grain crops instead." The policy does, however, encourage "land consolidation and yield improvement upgrades on existing fruit acreage that is not considered basic farmland."

To facilitate those yield improvements, China has begun to adopt dwarfing and high-density planting systems. It has also begun to improve its infrastructure, including air-conditioned storage and modern, intelligent grading lines to improve efficiency and enhance fruit quality.

Additionally, the report notes that China's "apple industry is currently characterized by an intensive focus on varietal modernization and quality improvement, a movement driven by evolving consumer trends that emphasize quality and flavor. However, Fuji still dominates cultivation, constituting 70 percent of the total production."

On the trade front, the report highlights an overall decline in China's importation of deciduous fruits given improved availability and quality of domestic produce. Additionally, it mentions that fruit imports from the United States are declining, "largely due to retaliatory tariffs imposed by the Chinese government." In terms of China's apple exports, USDA expects that growth will continue in Southeast Asia, Central Asia and Russia with competitive pricing.

³⁹ USDA, Foreign Agricultural Service. Fresh Deciduous Fruit Annual: China. December 2025.





As discussed above, the U.S. currently finds itself in a precarious trade situation with on-again, off-again tariffs and a USMCA now subject to annual renegotiation and special interest carveouts. Uncertainty around what the next year, or even the next month, will bring make planning and investing for the future significantly more challenging, and risky.

As shown in **Table 11**, China was the second largest provider of apple juice concentrate to the U.S. in 2025. In April of that year, after back-and-forth escalations, the U.S. tariff rate on Chinese imports reached a staggering 145%. If buyers of Chinese juice had not been able to switch suppliers or rely on existing inventory, the tariff bill would have topped \$200 million. The fact that those duties would eventually have been refunded is beside the point. The point is that without prior proper planning, buyers of this critical input would have been left with a difficult choice between paying more or making less. Fortunately, importers of juice concentrate had planned ahead, buying 12 to 18 months of supply before the tariffs were announced. If something positive can be said of the tariffs, they likely forced a number of these juice importers to diversify their supply chains, insulating themselves from future unexpected disruptions.

It can also be argued that the use of tariffs, or even the threat of tariffs, along with the Administration's unpredictable and aggressive negotiating style may lead to new and exciting opportunities. Following the "Liberation Day" announcements in April 2025, three of the top six U.S. fresh apple export markets – Taiwan, Viet Nam, and India – indicated a willingness to negotiate on apples specifically. If followed up on, these deals could supercharge already important markets. Blunt instruments may also be useful against other countries like South Korea, Japan, and Australia. Countries that, despite existing trade agreements, have instituted such rigorous phytosanitary protocols that they effectively block all U.S. apple shipments. If one or more of these markets could be persuaded to do away with their non-tariff trade barriers, it could be a huge opportunity for exporters and the U.S. market at large.



CORE
INSIGHTS

EUROPE

Taken as a group, Europe would be the second largest apple producing region behind China. According to WAPA, the major European apple-growing countries listed in **Table 12** will produce more than 500 million bushels in 2026/27 – significantly below 2025/26 production levels and 17% lower than the five-year average.

Within Europe, Poland is the largest apple-producing country. Following a devastating freeze in late April 2026, production is expected

to be down 30%, dropping to 140 million bushels. Italy, the second largest producer at 119 million bushels, supplies Europe with around 23% of its apples. The top five countries, which also include France, Germany and Spain, account for 80% of total production.

On a varietal basis, Golden Delicious accounts for 19% of all European apples. The next largest varieties include Gala, Red Delicious, Idared and Granny Smith. The estimated 2026/27 production by variety is featured in **Table 13**.

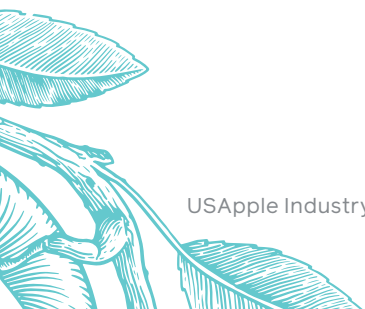


Table 12: European Apple Production, by Select Countries

	2026/27 (F)		2025/26		5-YR. AVERAGE	
Europe Total	507,744,982		600,968,914		609,304,477	
Poland	139,888,388	28%	199,465,619	33%	207,391,753	34%
Italy	119,101,971	23%	121,726,519	20%	115,364,615	19%
France	60,994,487	12%	80,468,630	13%	76,080,386	12%
Germany	53,173,335	10%	59,734,704	10%	52,784,902	9%
Spain	27,557,750	5%	25,615,585	4%	26,528,927	4%
Romania	22,571,110	4%	23,201,001	4%	27,337,288	4%
Greece	15,274,867	3%	9,973,281	2%	12,440,356	2%
Portugal	14,697,467	3%	14,697,467	2%	16,240,701	3%
Netherlands	10,235,736	2%	12,387,865	2%	11,621,497	2%
United Kingdom	9,290,899	2%	10,235,736	2%	9,185,917	2%
Belgium	8,713,498	2%	11,652,991	2%	11,275,057	2%
Hungary	7,086,279	1%	8,923,462	1%	19,421,652	3%
Austria	4,724,186	1%	7,243,751	1%	6,298,914	1%
Croatia	3,359,421	1%	2,519,566	0%	3,170,454	1%
Czechia	2,782,020	1%	6,141,441	1%	5,270,092	1%
Slovenia	2,204,620	0.4%	1,837,183	0.3%	2,456,577	0.4%
Slovakia	1,889,674	0.4%	1,679,710	0.3%	1,658,714	0.3%
Sweden	1,679,710	0.3%	1,679,710	0.3%	1,679,710	0.3%
Denmark	1,312,274	0.3%	1,259,783	0.2%	1,070,815	0.2%
Lithuania	892,346	0.2%	209,964	0.0%	1,606,223	0.3%
Latvia	314,946	0.1%	314,946	0.1%	419,928	0.1%

Sources: World Apple and Pear Association; USAApple

Notes: Production levels are reported in 42-pound bushels.

Five-year averages do not include 2026/27 (F) data.

Table 13: European Apple Production, by Select Varieties

	2026/27 (F)		2025/26		5-YR. AVERAGE	
Europe Total	507,744,982		600,968,914		609,304,477	
Golden Delicious	95,008,624	19%	106,819,088	18%	120,361,754	20%
Gala	71,545,168	14%	78,526,465	13%	78,106,537	13%
Red Delicious	26,088,003	5%	27,505,259	5%	32,659,871	5%
Idared	21,836,236	4%	27,137,822	5%	32,271,438	5%
Granny Smith	18,109,379	4%	18,896,743	3%	19,012,223	3%
Cripps Pink	18,004,397	4%	19,369,161	3%	16,618,636	3%
Red Jonaprince	15,957,250	3%	25,615,585	4%	24,754,733	4%
Elstar	15,957,250	3%	19,474,143	3%	17,615,964	3%
Shampion	15,589,813	3%	19,999,053	3%	21,804,742	4%
Fuji	14,802,449	3%	14,697,467	2%	16,156,715	3%
Jonagold	12,755,301	3%	17,584,469	3%	19,558,129	3%
Braeburn	8,031,116	2%	9,553,353	2%	9,910,292	2%
Ligol	6,823,824	1%	10,498,190	2%	11,757,973	2%
Jonagored	6,823,824	1%	10,183,245	2%	10,214,739	2%
Other	160,412,350	32%	195,108,870	32%	188,841,450	31%

Sources: World Apple and Pear Association; USAApple

Notes: Production levels are reported in 42-pound bushels.

Five-year averages do not include 2026/27 (F) data.



While not strictly in Europe, Türkiye is worth keeping an eye on as it is just behind the U.S. in global production and their fresh apple export volumes have been growing rapidly, up 126% from 2015 to 2024. Their proximity to export markets and competitive prices have been keys to their success in India, Iraq, Russia, Saudi Arabia, Libya and Syria, the six countries which made up 90% of their export volume in 2024.

Unfortunately for Turkish apple growers, the 2025/26 season was a disaster. Much like Poland's misfortune this year, Türkiye was hit by frosts in April 2025 and lost half of their crop, more than 110 million bushels. For the coming 2026/27 season, WAPA estimates that production will be back to five-year averages, increasing by more than 100% to 24.5 million bushels.

Along with rising exports, Türkiye has been making a serious and sustained efforts to increase total production as growers have “invested in modernizing their operations, introduced the latest growing techniques and innovations, and started planting higher-yielding trees. For example, larger growers have invested in modern, two-dimensional orchards where they are using drip irrigation systems, shade covers to protect the apples from hail and sun damage, harvest machines, and fans to protect apple blossoms from frost damage. These investments have enabled Türkiye to produce larger volumes of high-quality apples, a large share of which are going for export.”⁴⁰

As for varieties and utilization, the report notes, “[w]ith its diverse geography and climate, Türkiye produces hundreds of varieties of apples, but only a few of these are marketed commercially. The main varieties are Starking, Golden, Amasya, and Granny Smith, which collectively accounted for 70 percent of total production in 2024/2025. Approximately 55–60 percent of apple production is consumed as fresh fruit. About 35–40 percent of apple

production is processed into juice, canned products, vinegar, or dried products. About 5–10 percent of production is exported as fresh produce.”

The other reason to keep an eye on Türkiye is that they are the number one supplier of U.S. apple juice and juice concentrate. With other top sources of juice in question, U.S. buyers will want to ensure that supply chains are robust enough to handle any disruptions.

SOUTH AMERICA

Together, Chile, Brazil and Argentina are responsible for around 94% of total South American apple production. According to WAPA, in 2026/27⁴¹, Brazil's production was estimated to be up 25% to 54 million bushels. Chile is thought to have produced around 46 million bushels, down 5% from last season. Similarly, Argentina's apple production was declining, down 7% from last year to around 27 million bushels.

MEXICO

While Mexico only produces around 1% of the world's apples, it is an exceedingly important export market for the U.S. (see **Figure 11**). As such, it is critical that U.S. growers and marketers have some understanding of Mexico's production levels that will affect the quantity of U.S. apples they need to bring in to satisfy their domestic demand.

According to WAPA, Mexico's 2026/27 crop will be 1% below last year's figure with production totaling around 47 million bushels. In terms of varieties, the USDA reported that, “[i]n 2025, Mexico's Golden Delicious (about 56 percent of total production) and Red Delicious (around 30 percent) varieties continue to lead the market, with retail prices per kilo comparable to 2024 levels and 40 to 48 percent lower than imported U.S. apple varieties in general.”⁴²

⁴⁰ USDA, Foreign Agricultural Service. Fresh Deciduous Fruit Annual: Türkiye. December 2025.

⁴¹ Given South America's position in the Southern Hemisphere, the crop year begins approximately six months earlier than in Northern Hemisphere countries. As such, South America's 2026/27 crop has already been harvested and the remaining apples are in storage.

⁴² USDA, Foreign Agricultural Service. Fresh Deciduous Fruit Annual: Mexico. December 2025.

CANADA

Just as was the case for Mexico, U.S. growers and marketers must pay close attention to the Canadian production situation given its importance as an export market (see **Figure 11**). According to Apples Canada/Pommes Canada, production will decrease to 19 million bushels – a 2% decline from 2025/26 levels (see **Table 14**). This represents a 3% decrease from the five-year production average.

At the provincial level, Ontario, the nation's largest apple-growing region, is expected to produce slightly less than last season with around 8 million bushels. Quebec's production is estimated to decrease by 5% to just under 6 million bushels. British Columbia is also expected to be down, shedding 13% to around 3 million bushels. Nova Scotia is projected to increase by 28% to 2.3 million bushels and New Brunswick will be down 10% to slightly more than 200,000 bushels.

On a varietal basis, Gala is the number one apple grown in Canada with an expected 2026/27 production volume of almost 4 million bushels, around 20% of total production. Rounding out the top five are Honeycrisp, Ambrosia, McIntosh, and Cortland (see **Table 15**).

In total, the estimates for the U.S., China, Europe (including the U.K.), South America, Mexico and Canada represent approximately 74% of total world apple production. By understanding the outlook for these key nations and regions, U.S. growers and marketers will be well positioned to maximize their current opportunities both at home and abroad.

Table 14: Canadian Apple Production, by Province

	2026/27 (F)	2025/26	5-YR. AVERAGE
LEVELS			
Canada	18,943,396	19,286,404	19,548,341
Ontario	7,732,000	7,798,000	8,071,800
Quebec	5,747,052	6,067,133	5,486,902
British Columbia	2,976,063	3,411,760	3,645,769
Nova Scotia	2,273,181	1,770,511	2,126,551
New Brunswick	215,100	239,000	217,320
PERCENT CHANGE (VS. 2026/27)			
Canada		-2%	-3%
Ontario		-1%	-4%
Quebec		-5%	5%
British Columbia		-13%	-18%
Nova Scotia		28%	7%
New Brunswick		-10%	-1%
MARKET SHARE			
Canada	100%	100%	100%
Ontario	41%	40%	41%
Quebec	30%	31%	28%
British Columbia	16%	18%	19%
Nova Scotia	12%	9%	11%
New Brunswick	1%	1%	1%

Source: Apples Canada/Pommes Canada

Notes: Production levels are reported in 42-pound bushels.
Five-year averages do not include 2026/27 (F) data.

Table 15: Canadian Apple Production, by Variety, by Province

2026/27 (F)	CANADA	BRITISH COLUMBIA	NEW BRUNSWICK	NOVA SCOTIA	ONTARIO	QUEBEC
Total Varieties	18,943,396	2,976,063	215,100	2,273,181	7,732,000	5,747,052
Gala	3,629,412	1,297,278	22,500	149,193	1,954,000	206,441
Honeycrisp	3,039,432	156,595	81,000	1,093,563	1,415,000	293,274
Ambrosia	2,504,440	1,174,459	11,700	179,079	1,010,000	129,202
McIntosh	2,452,618	84,438	46,800	190,755	641,000	1,489,625
Cortland	1,153,486	-	31,500	94,761	177,000	850,225
Empire	898,539	-	2,700	12,040	262,000	621,799
Spartan	757,070	111,305	1,800	5,532	-	638,433
Spy	514,552	-	-	99,552	415,000	-
Red Delicious	498,182	26,943	-	54,239	417,000	-
Others	3,495,665	125,045	17,100	394,467	1,441,000	1,518,053

Source: Apples Canada/Pommes Canada

Note: Production levels are reported in 42-pound bushels.

APPENDIX

Appendix A: U.S. Apple Juice & Concentrate Imports, by Top Countries

	2025		2024		YEAR-OVER-YEAR % CHANGE
APPLE JUICE CONCENTRATE					
World Total	\$503,772,000		\$503,637,000		0%
Türkiye	\$170,555,000	34%	\$189,257,000	38%	-10%
China	\$131,523,000	26%	\$127,567,000	25%	3%
Chile	\$32,703,000	6%	\$30,248,000	6%	8%
South Africa	\$30,211,000	6%	\$26,634,000	5%	13%
Ukraine	\$28,627,000	6%	\$25,997,000	5%	10%
All Others (52)	\$110,153,000	22%	\$103,934,000	21%	6%
APPLE JUICE CONCENTRATE - FROZEN					
World Total	\$21,048,000		\$52,499,000		-60%
China	\$7,744,000	37%	\$22,481,000	43%	-66%
Brazil	\$5,988,000	28%	\$16,688,000	32%	-64%
Türkiye	\$3,171,000	15%	\$53,000	0%	5883%
South Africa	\$1,942,000	9%	\$461,000	1%	321%
Poland	\$1,346,000	6%	\$-	0%	N/A
All Others (10)	\$857,000	4%	\$12,816,000	24%	-93%
ORGANIC APPLE JUICE CONCENTRATE – FROZEN					
World Total	\$6,003,000		\$11,776,000		-49%
Türkiye	\$4,128,000	69%	\$10,662,000	91%	-61%
Argentina	\$1,865,000	31%	\$-	0%	N/A
Canada	\$7,000	0%	\$3,000	0%	133%
Viet Nam	\$3,000	0%	\$-	0%	N/A
China	\$-	0%	\$1,111,000	9%	-100%
All Others (0)	\$-	0%	\$-	0%	N/A
SINGLE-STRENGTH JUICE (BRIX < 20)					
World Total	\$133,700,000		\$119,741,000		12%
Türkiye	\$94,672,000	71%	\$83,853,000	70%	13%
Canada	\$36,234,000	27%	\$15,840,000	13%	129%
Mexico	\$1,355,000	1%	\$1,367,000	1%	-1%
Georgia	\$265,000	0%	\$-	0%	N/A
France	\$181,000	0%	\$105,000	0%	72%
All Others (29)	\$993,000	1%	\$18,576,000	16%	-95%

Sources: USDA, Foreign Agricultural Service, USApple

Appendix B: Global Apple Production, by Country: 2024

WORLD TOTAL		5,137,791,373	
1	China	2,692,069,356	52.4%
2	United States of America	258,404,560	5.0%
3	Türkiye	232,019,720	4.5%
4	Poland	177,655,628	3.5%
5	India	137,835,939	2.7%
6	Italy	125,901,649	2.5%
7	Iran (Islamic Republic of)	123,192,527	2.4%
8	Russian Federation	105,738,072	2.1%
9	France	103,093,805	2.0%
10	Uzbekistan	77,808,994	1.5%
11	South Africa	69,684,095	1.4%
12	Chile	68,189,132	1.3%
13	Ukraine	60,411,837	1.2%
14	Brazil	52,358,150	1.0%
15	Egypt	50,344,113	1.0%
16	Germany	45,771,586	0.9%
17	Pakistan	44,846,787	0.9%
18	Morocco	44,730,761	0.9%
19	Democratic People's Republic of Korea	42,076,836	0.8%
20	Mexico	40,928,441	0.8%
21	Japan	34,558,852	0.7%
22	Algeria	31,058,782	0.6%
23	New Zealand	30,193,547	0.6%
24	Spain	28,611,768	0.6%
25	Argentina	25,933,825	0.5%
26	Romania	25,570,443	0.5%
27	Republic of Korea	24,150,457	0.5%
28	United Kingdom of Great Britain and Northern Ireland	21,418,768	0.4%
29	Republic of Moldova	21,237,577	0.4%
30	Serbia	20,429,244	0.4%
31	Canada	20,280,824	0.4%
32	Hungary	19,772,292	0.4%
33	Belarus	17,673,704	0.3%
34	Afghanistan	17,523,467	0.3%
35	Portugal	16,440,691	0.3%
36	Azerbaijan	15,748,505	0.3%
37	Australia	15,418,220	0.3%
38	Tajikistan	14,577,630	0.3%
39	Greece	13,816,144	0.3%
40	Kazakhstan	11,846,368	0.2%
41	Switzerland	11,229,179	0.2%
42	Lebanon	10,183,245	0.2%
43	Netherlands (Kingdom of the)	10,183,245	0.2%
44	Bosnia and Herzegovina	10,073,014	0.2%
45	Syrian Arab Republic	9,701,063	0.2%
46	Austria	9,215,312	0.2%
47	Belgium	8,418,499	0.2%

48	Tunisia	7,369,122	0.1%
49	Kyrgyzstan	7,330,696	0.1%
50	North Macedonia	6,702,885	0.1%
51	Peru	6,086,080	0.1%
52	Albania	5,272,980	0.1%
53	Armenia	5,012,099	0.1%
54	Israel	4,199,591	0.1%
55	Georgia	4,010,309	0.1%
56	Iraq	3,989,563	0.1%
57	Croatia	3,565,710	0.1%
58	Turkmenistan	3,439,456	0.1%
59	Lithuania	3,222,420	0.1%
60	Nepal	2,861,072	0.1%
61	Slovenia	2,658,667	0.1%
62	El Salvador	2,342,599	0.0%
63	Uruguay	2,301,436	0.0%
64	Czechia	1,967,886	0.0%
65	Bulgaria	1,933,242	0.0%
66	Slovakia	1,766,321	0.0%
67	Yemen	1,671,703	0.0%
68	Sweden	1,621,970	0.0%
69	Guatemala	1,337,112	0.0%
70	Ireland	1,154,276	0.0%
71	Norway	1,055,068	0.0%
72	Denmark	971,608	0.0%
73	Jordan	856,358	0.0%
74	Latvia	761,119	0.0%
75	Colombia	723,324	0.0%
76	Finland	481,342	0.0%
77	Montenegro	457,579	0.0%
78	Madagascar	378,417	0.0%
79	Ecuador	377,762	0.0%
80	Zimbabwe	345,548	0.0%
81	Libya	305,159	0.0%
82	Malawi	154,733	0.0%
83	Cyprus	148,549	0.0%
84	Bolivia (Plurinational State of)	146,028	0.0%
85	Estonia	113,380	0.0%
86	Bhutan	110,343	0.0%
87	Saint Vincent and the Grenadines	88,154	0.0%
88	Luxembourg	77,162	0.0%
89	Kenya	39,053	0.0%
90	Paraguay	35,361	0.0%
91	Grenada	11,280	0.0%
92	Honduras	10,201	0.0%
93	Malta	-	0.0%

Sources: United Nations, Food and Agriculture Organization; USApple
Note: Production levels are reported in 42-pound bushels.



refrigeration → controls & energy management → dynamic controlled atmosphere → building design & construction → interior fit-out → controlled atmosphere equipment → secondary

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