



8/19 – 8/21 | CHICAGO



Optimism on Uneven Ground

Industry Outlook & Global Crop Report

August 20, 2026

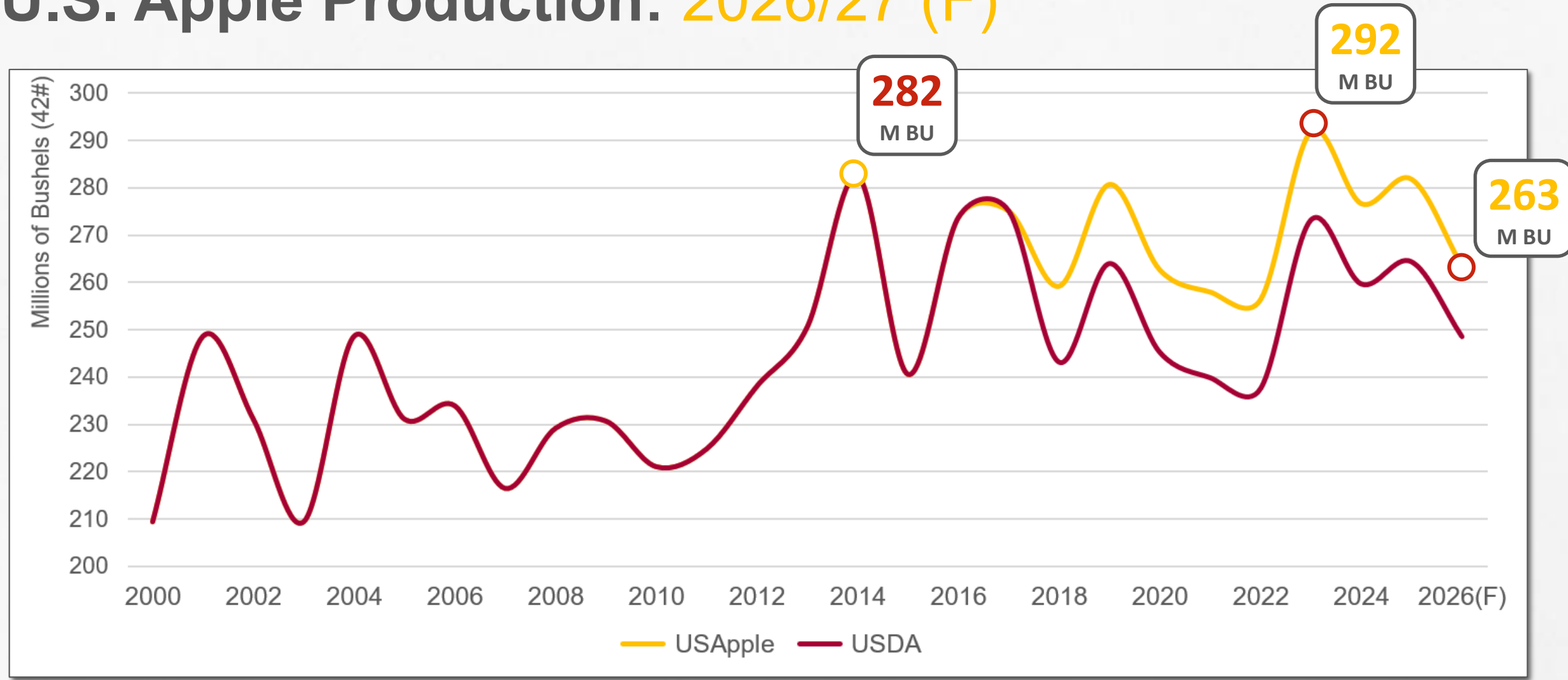
Chris Gerlach

VP, Insights & Analytics

USAPPLE.ORG

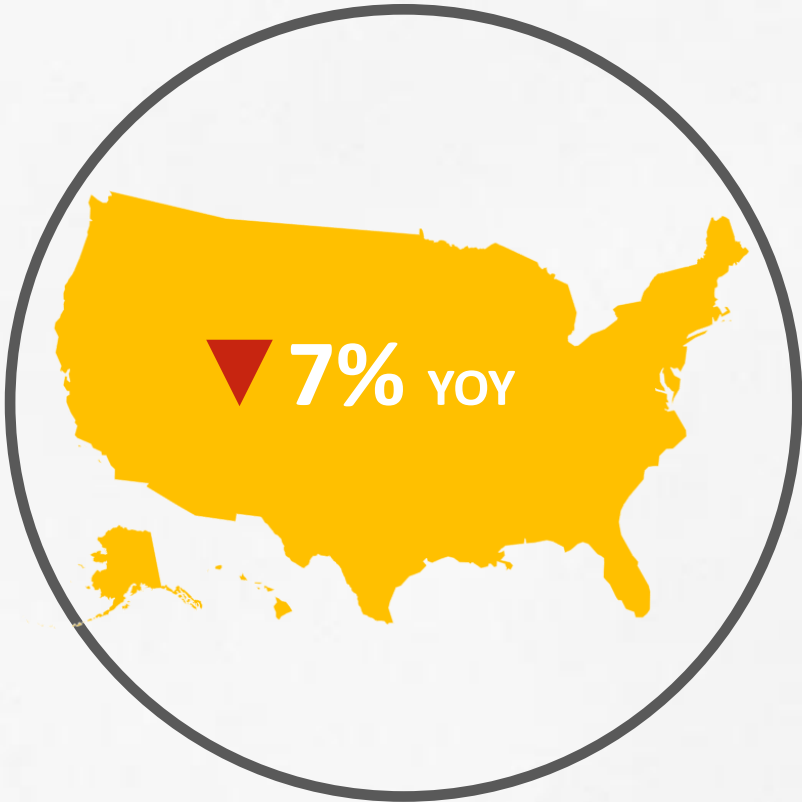


U.S. Apple Production: 2026/27 (F)



Sources: USDA, NASS; USApple

U.S. Apple Production: 2026/27 (F)

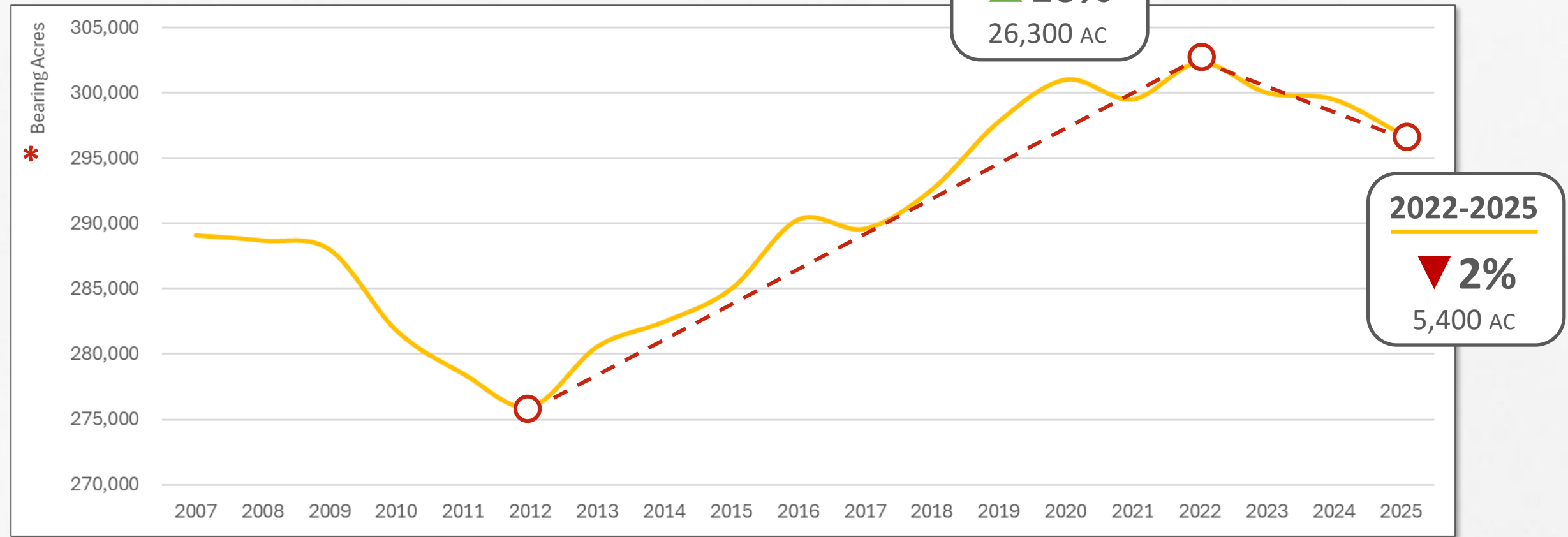


* includes USApple estimate of Other States

AUG 2026	USDA Estimate*	263	M BU
	Washington	176	M BU ▼ 2% YOY
	New York	32	M BU ▼ 10% YOY
	Michigan	25	M BU ▼ 1% YOY
	Pennsylvania	5	M BU ▼ 58% YOY
	California	5	M BU ▲ 1% YOY
	Oregon	4	M BU 0% YOY
	Virginia	2	M BU ▼ 48% YOY
	Other States	15	M BU ▼ 15% YOY

Sources: USDA, NASS; USApple

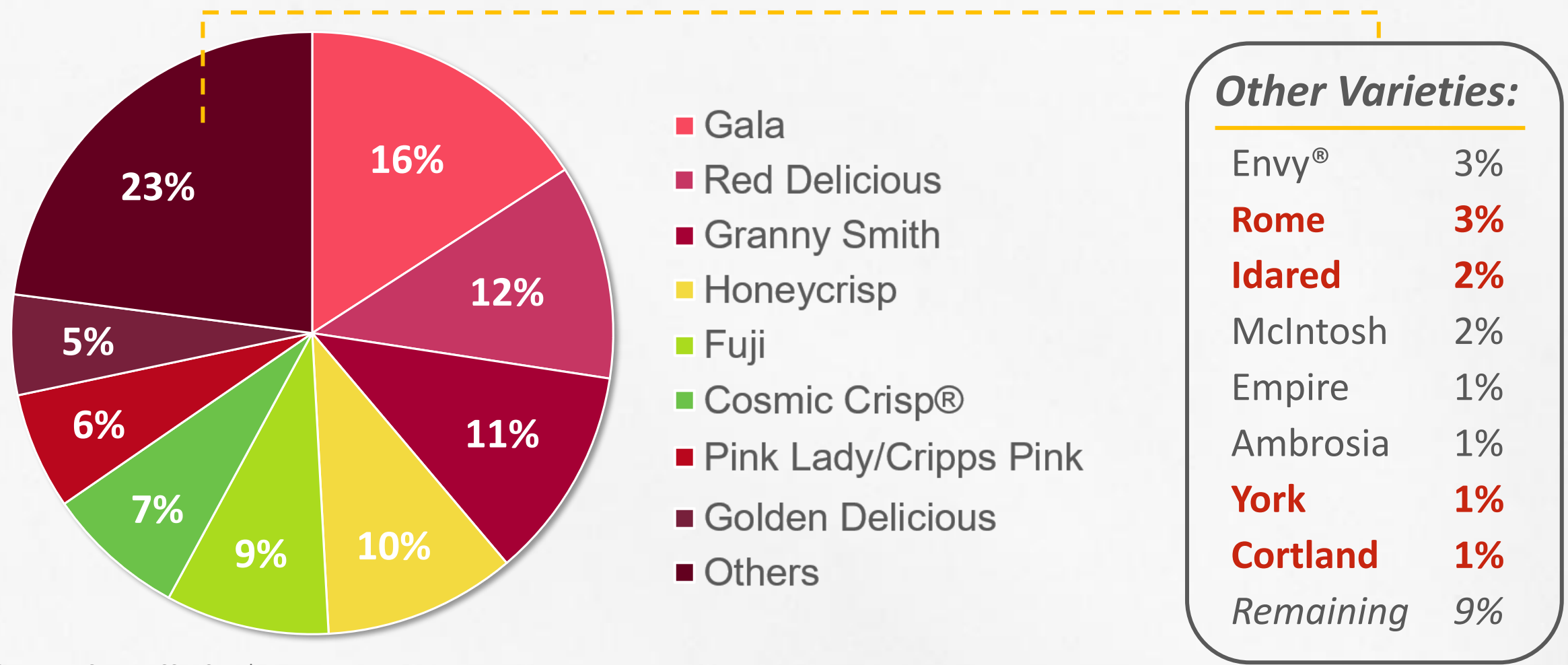
U.S. Apple Acreage: 2025/26



Sources: USDA, NASS; USApple

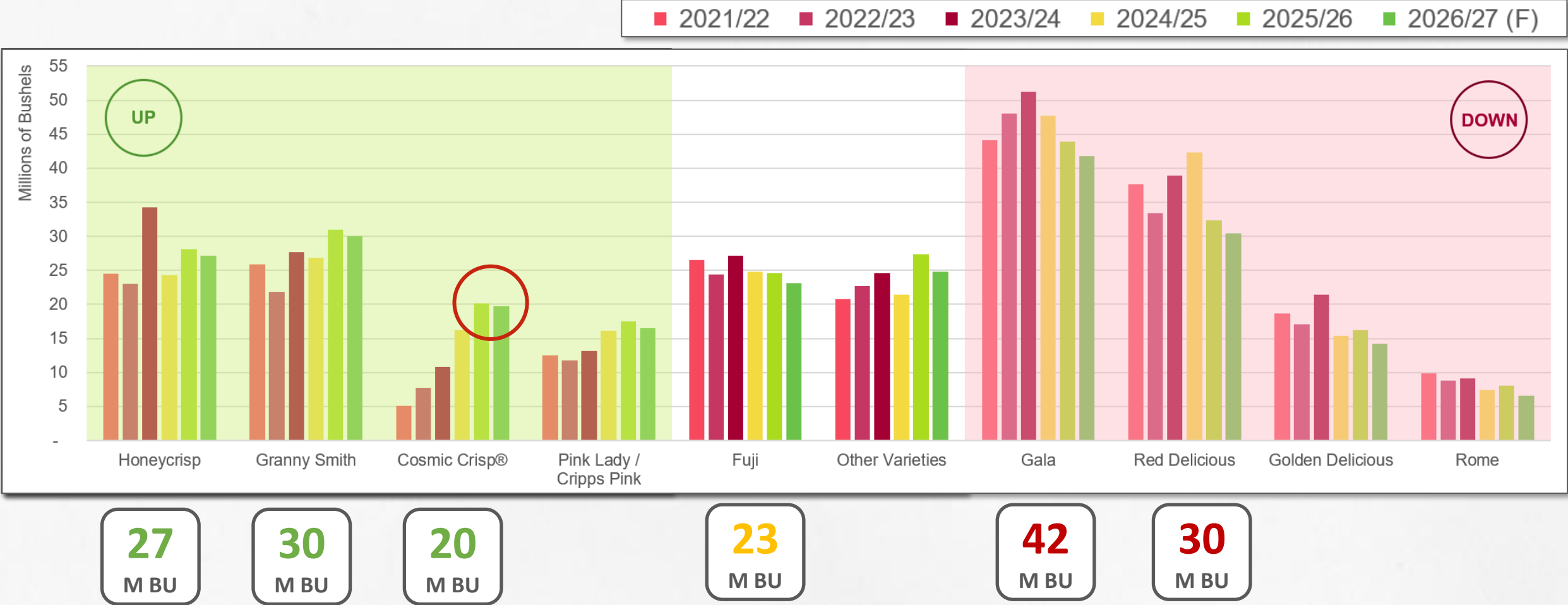
* top seven apple states

U.S. Apple Production by Variety: 2026/27 (F)



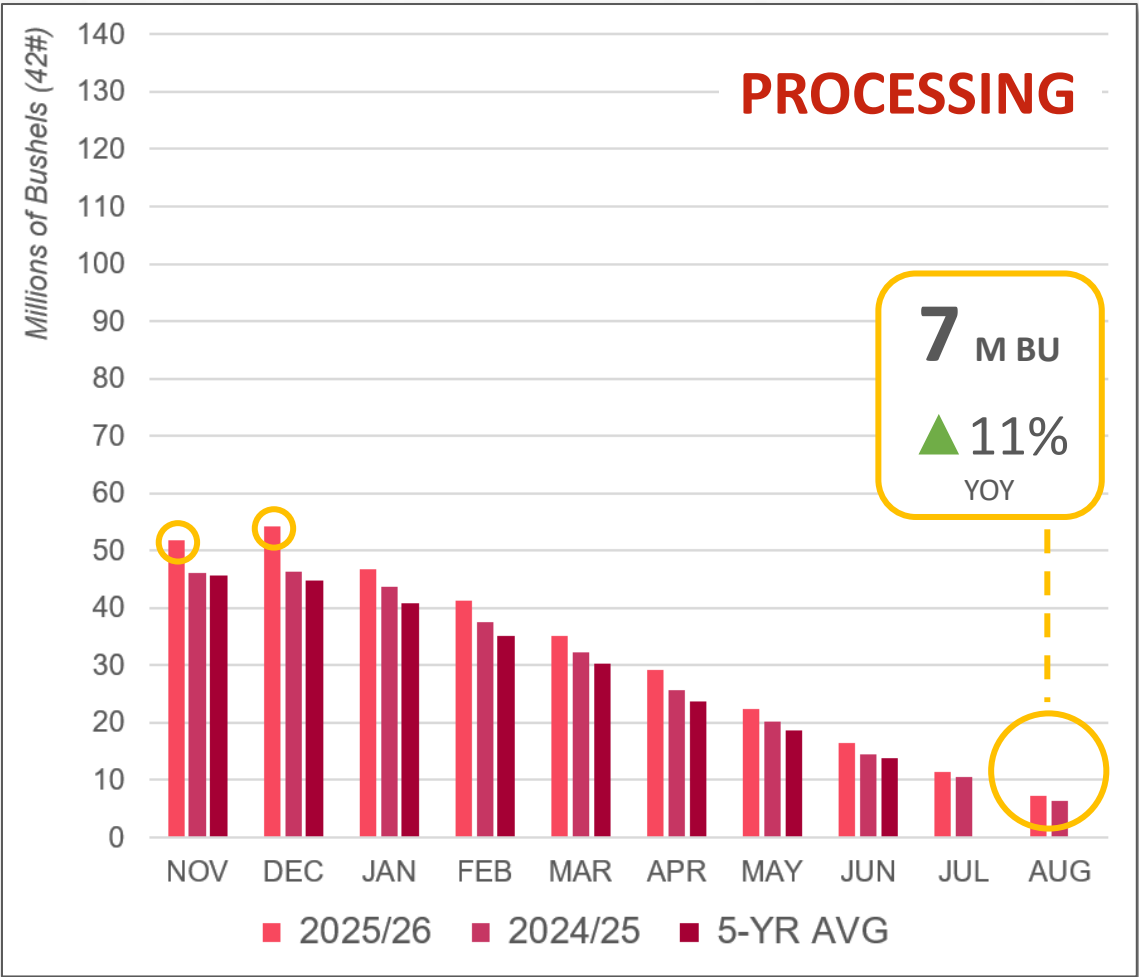
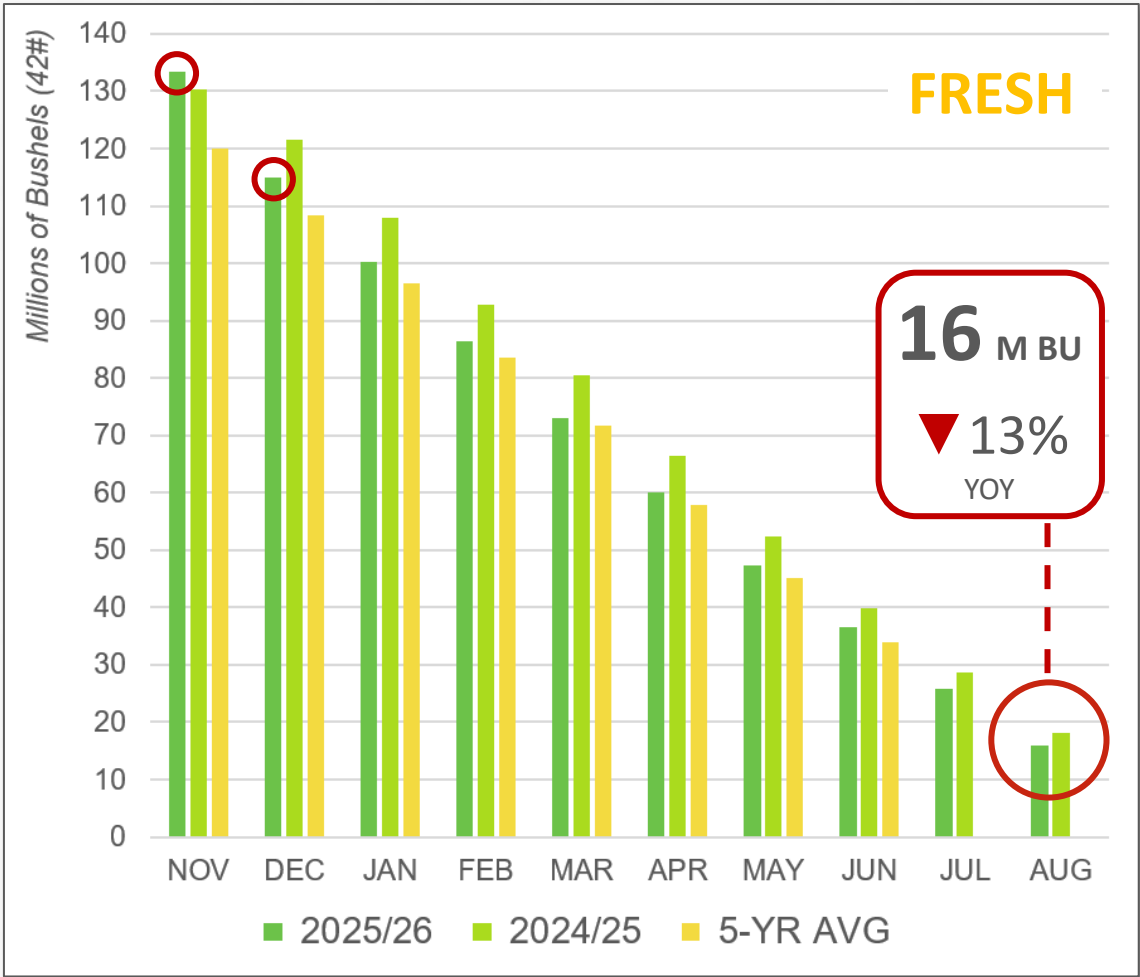
Sources: USDA, NASS; USApple

U.S. Apple Production by Variety: 2026/27 (F)



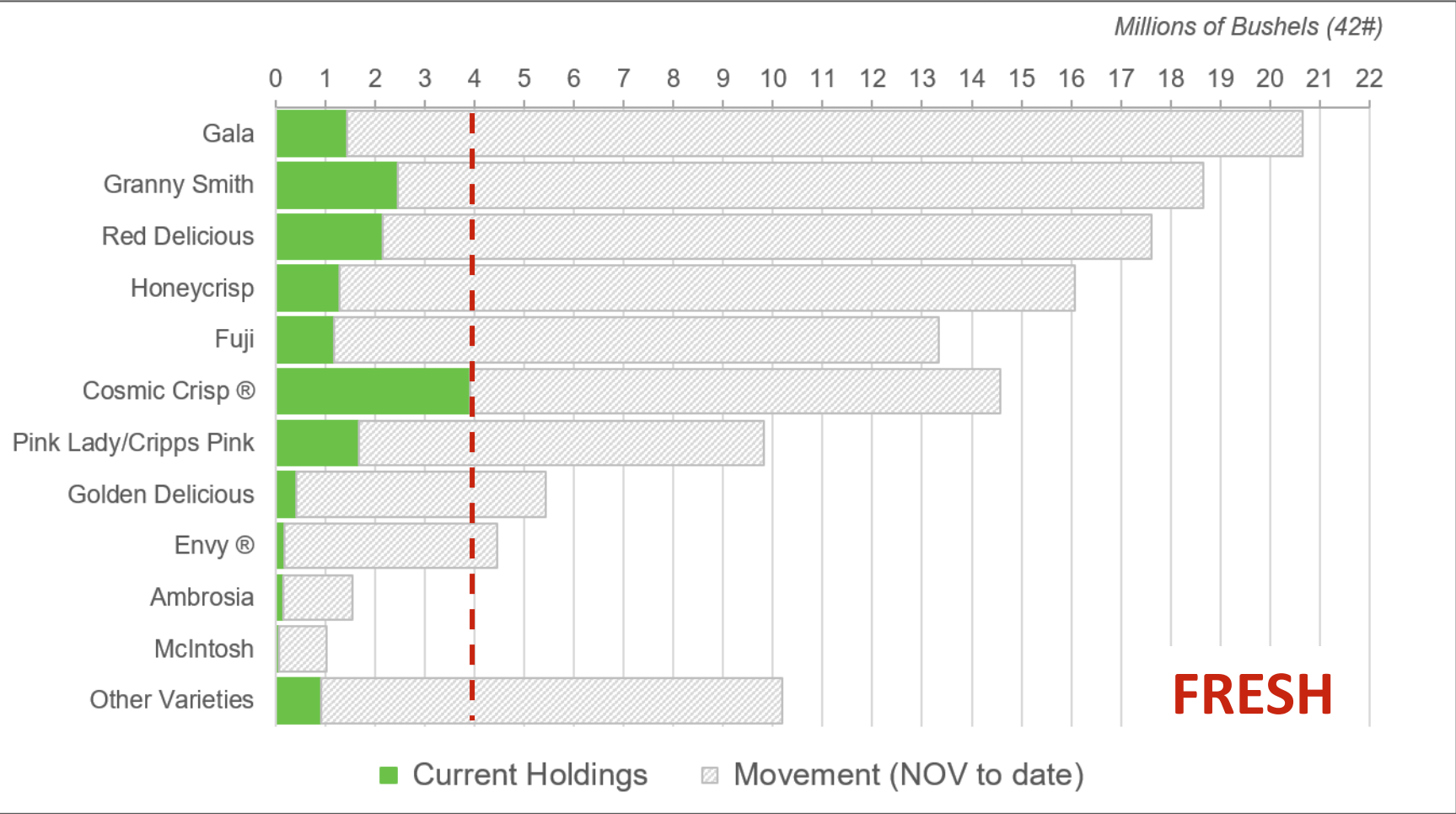
Sources: USDA, NASS; USApple

U.S. AppleTracker Storages: August 2026



Sources: USApple

U.S. AppleTracker Storages: August 2026

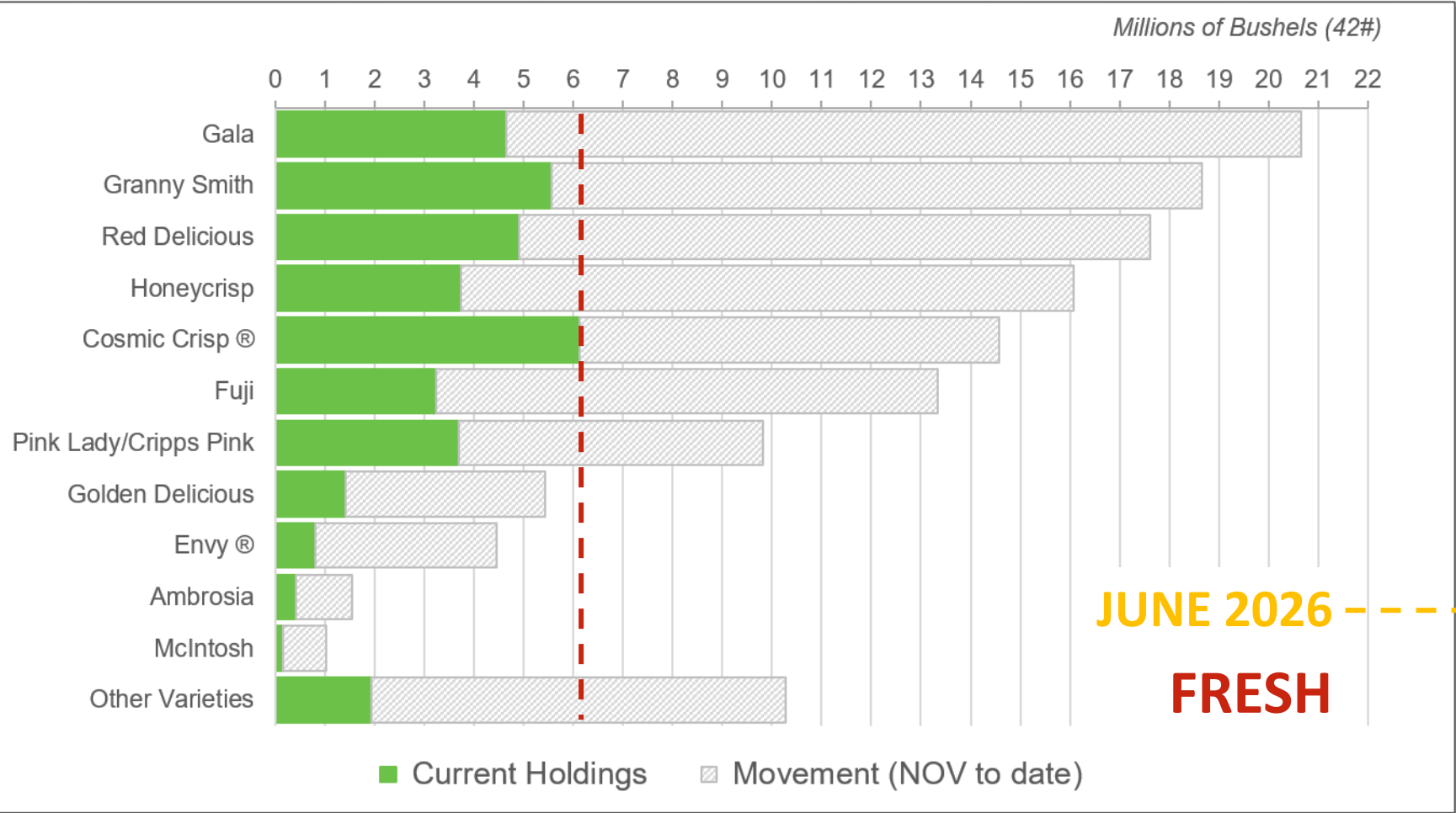


Sources: USApple



Gala:	▼ 12% YOY
GS:	▲ 15% YOY
RD:	▼ 39% YOY
HC:	▲ 58% YOY
WA 38:	▲ 18% YOY
Fuji:	▼ 21% YOY
Pinks:	▼ 33% YOY

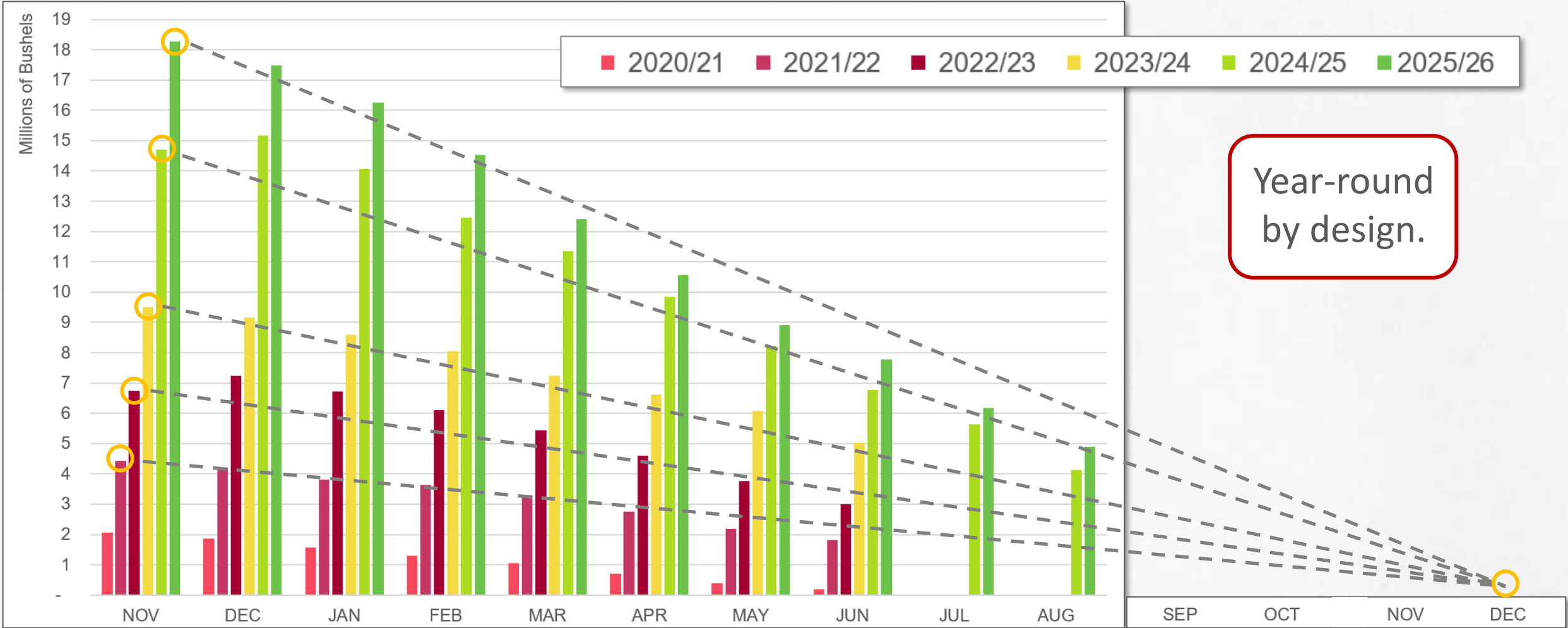
U.S. AppleTracker Storages: Cosmic Crisp®



First time WA 38 (Cosmic Crisp®) has been the most numerous variety in U.S. storages.

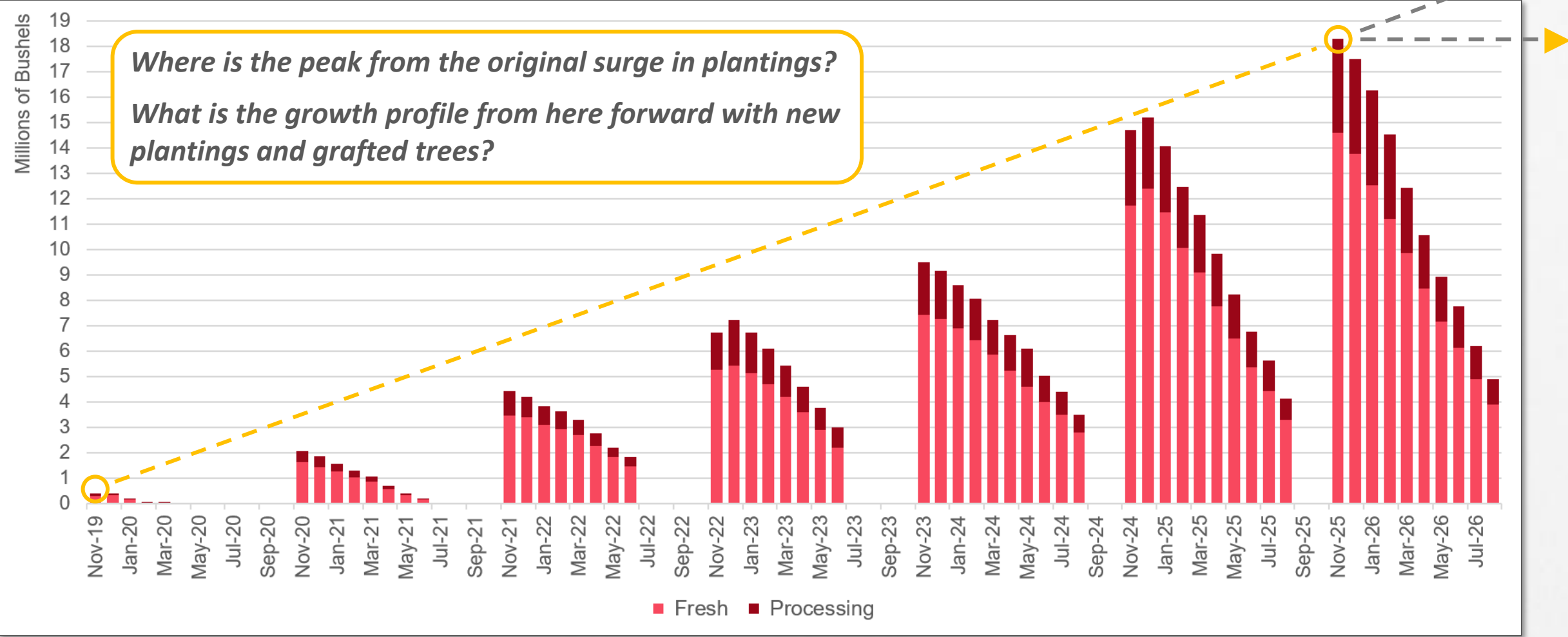
Sources: USApple, WSTFA

U.S. AppleTracker Storages: Cosmic Crisp[®]



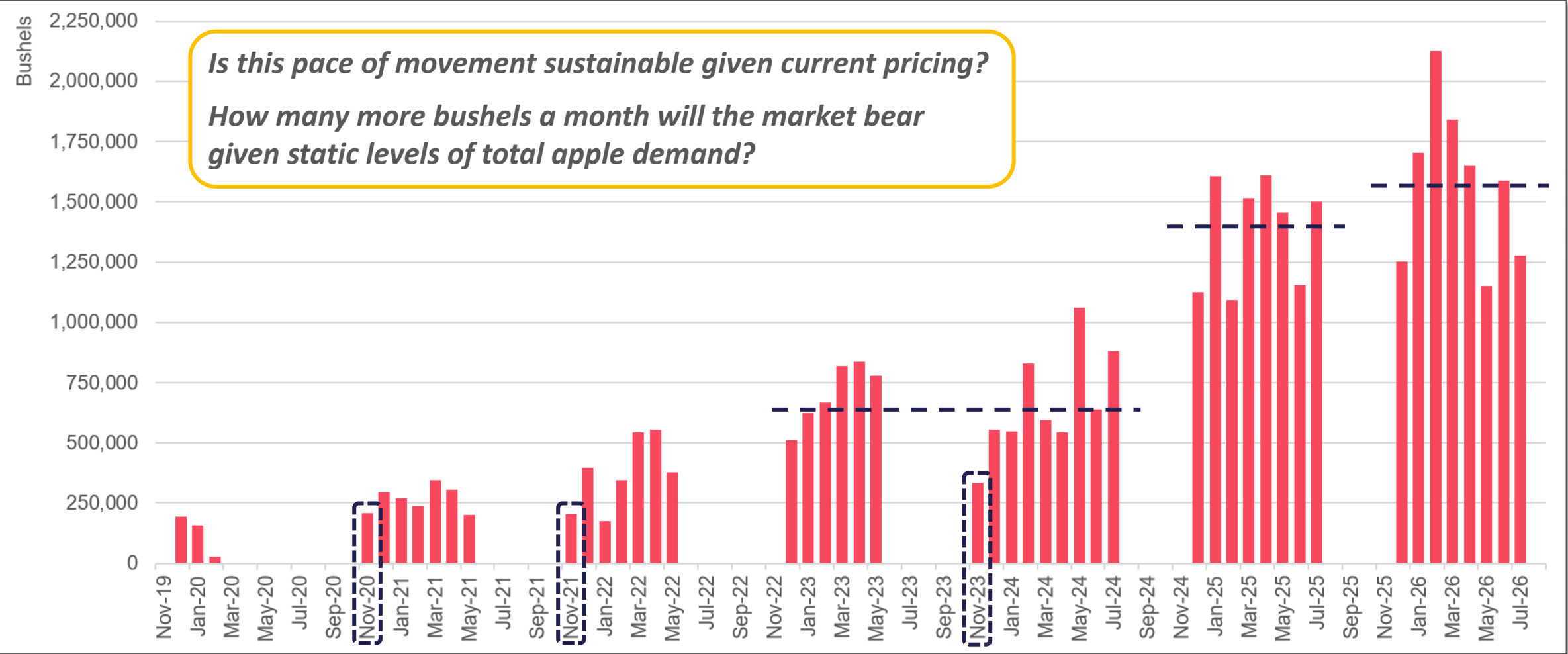
Sources: USApple, WSTFA

U.S. AppleTracker Storages: Cosmic Crisp[®]



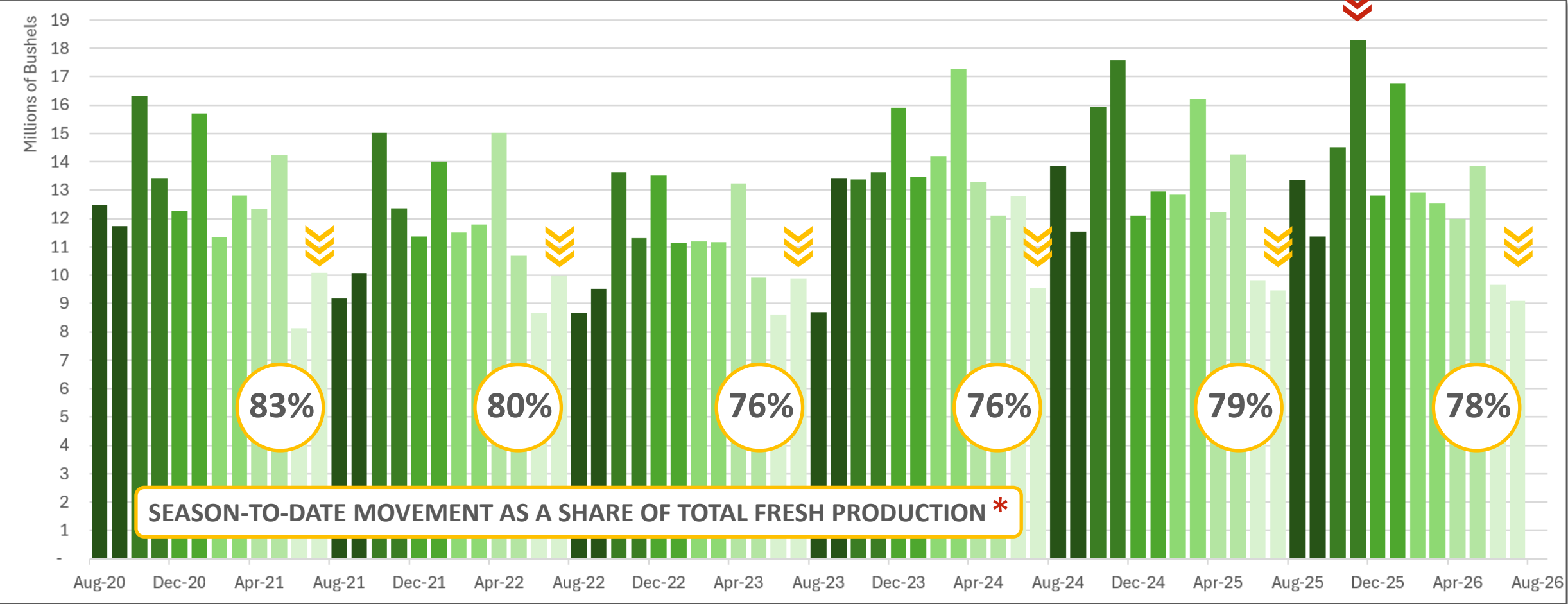
Sources: USApple, WSTFA

U.S. AppleTracker Movement: Cosmic Crisp[®]



Sources: USApple, WSTFA

U.S. Fresh Apple Movement

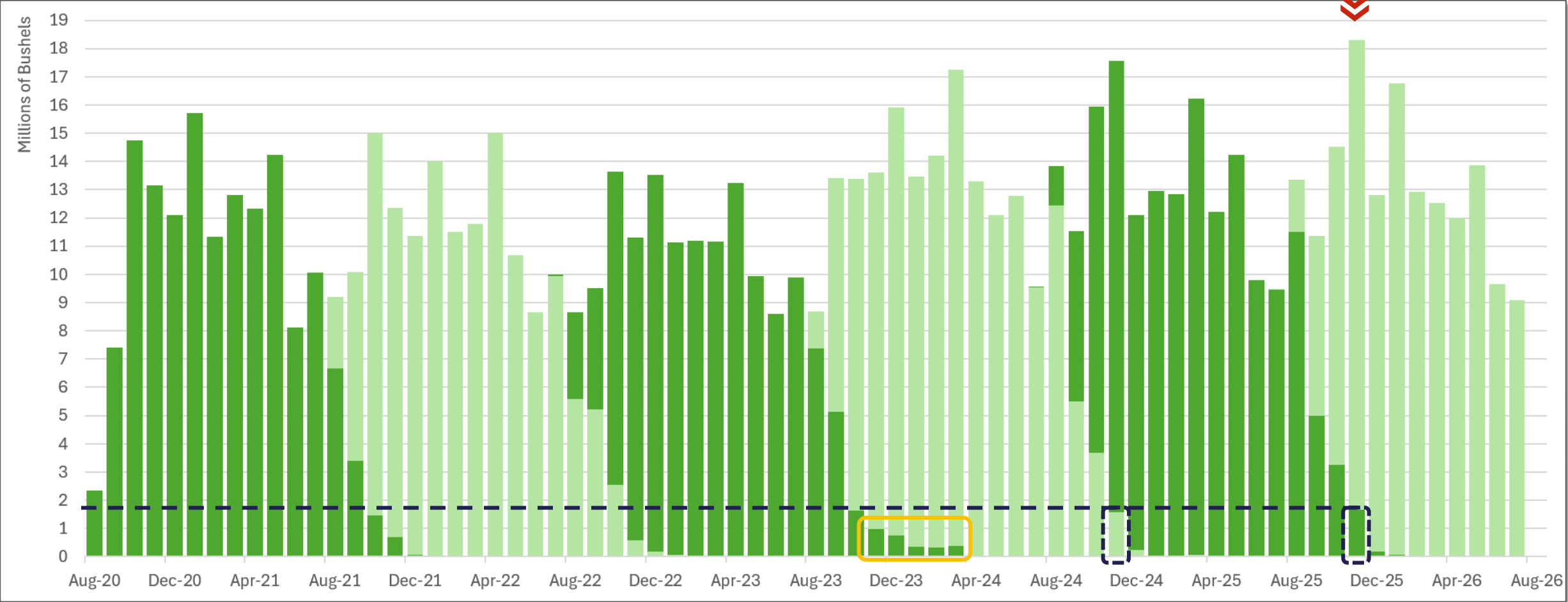


Sources: USDA, AMS & NASS; USApple

* total seasonal movement from AMS never equals total fresh production from NASS

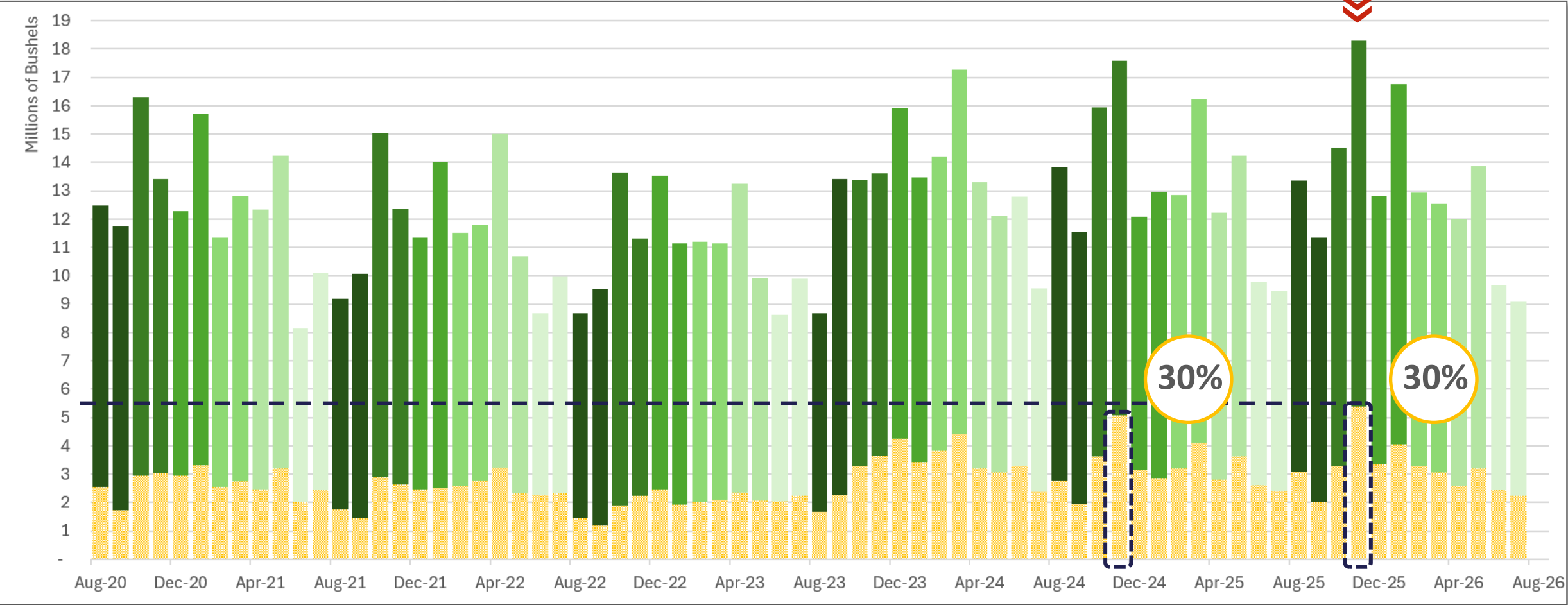
U.S. Fresh Apple Movement

NOV 2026



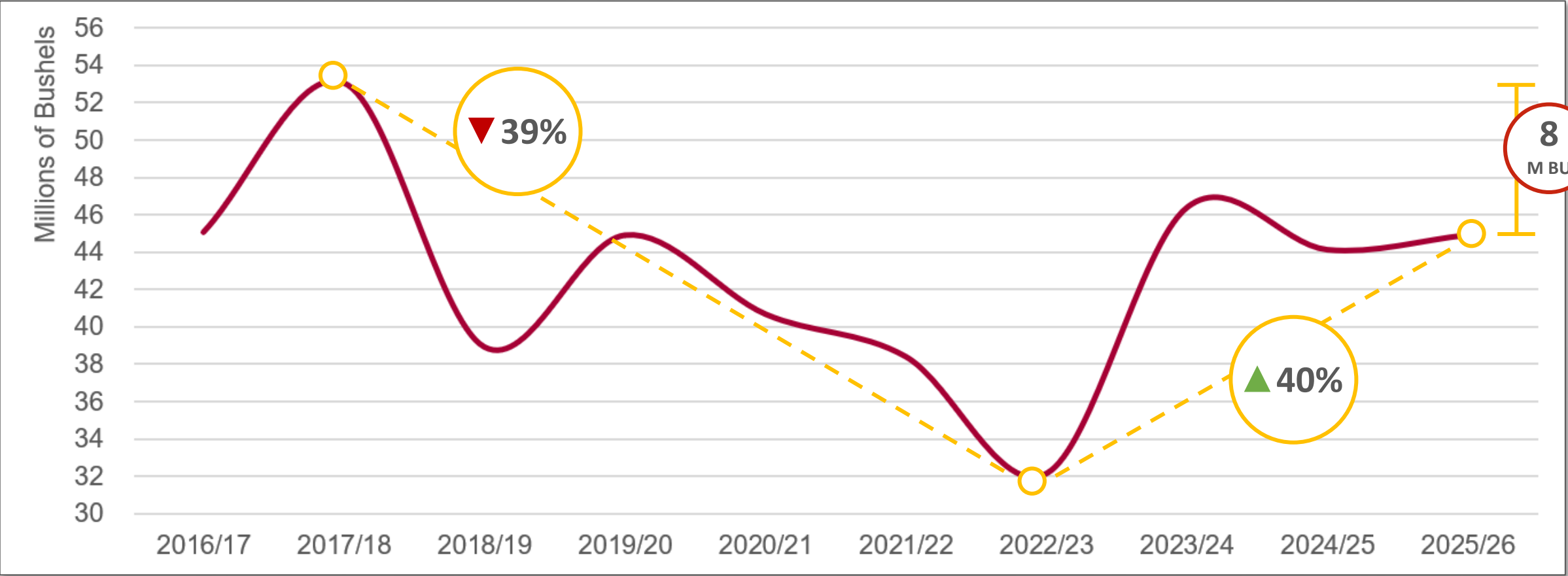
Sources: USDA, AMS; USApple

U.S. Fresh Apple Movement



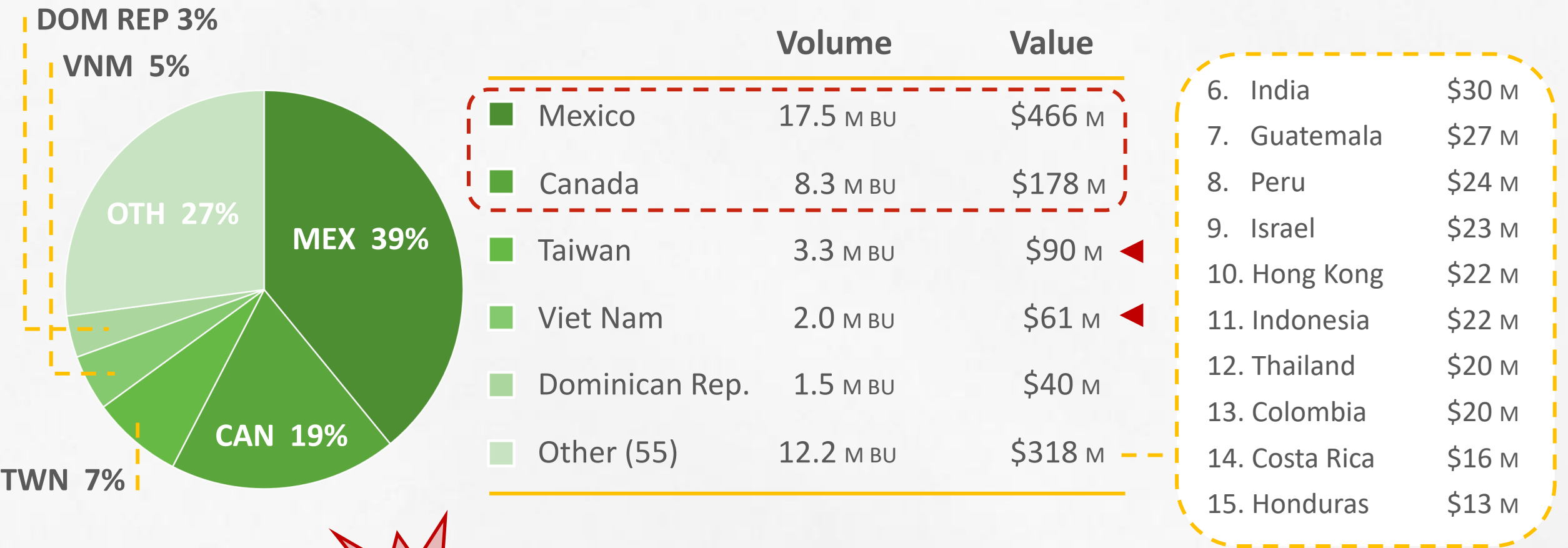
Sources: USDA, AMS; USApple

U.S. Fresh Apple Exports: 10 Years



Sources: USDA, FAS; USApple

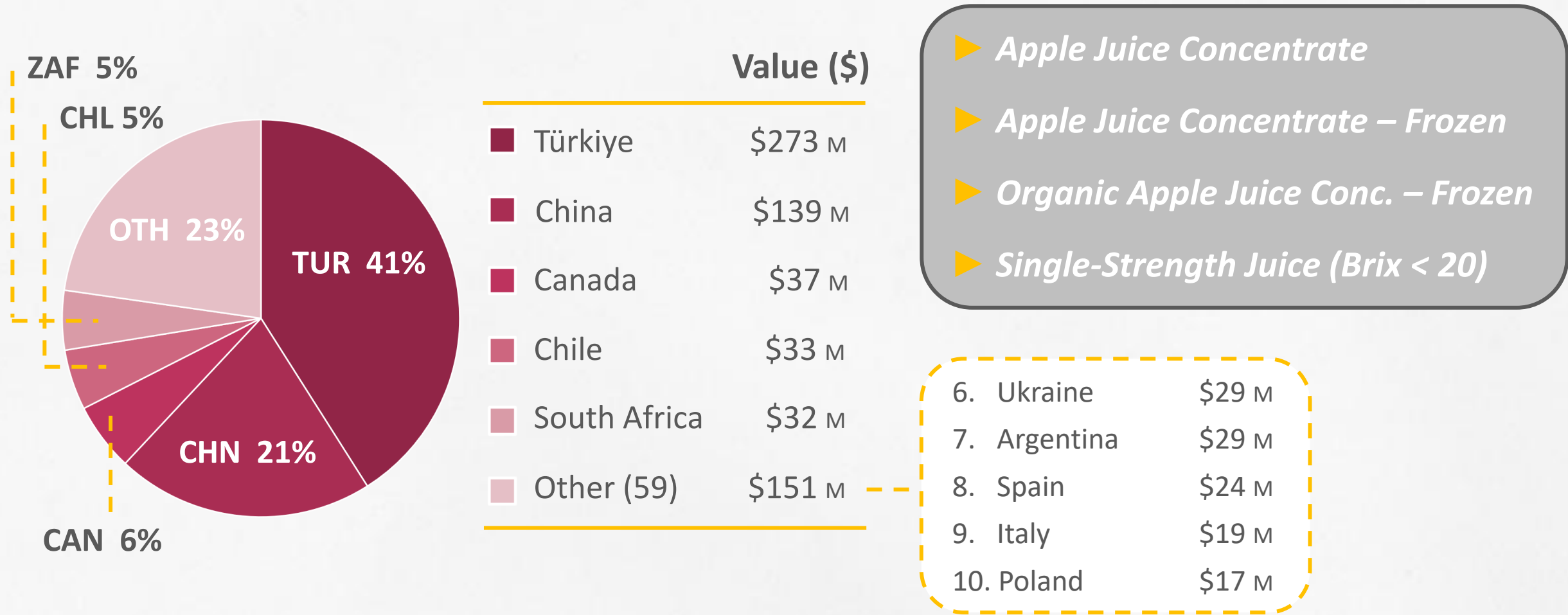
U.S. Fresh Apple Exports: 2025/26



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

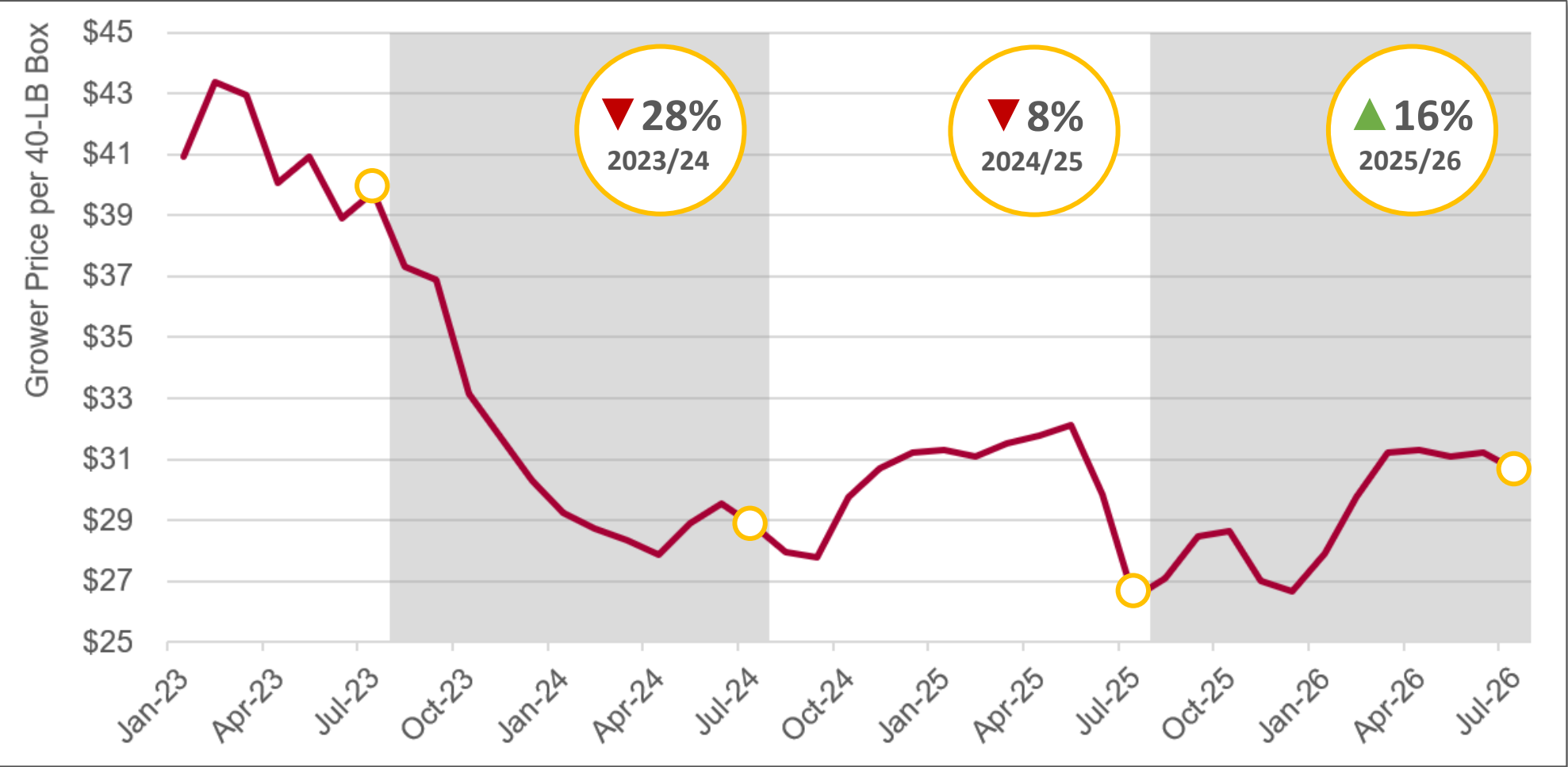
Sources: USDA, FAS; USApple

U.S. Apple Juice & Concentrate Imports: 2025



Sources: USDA, FAS; USApple

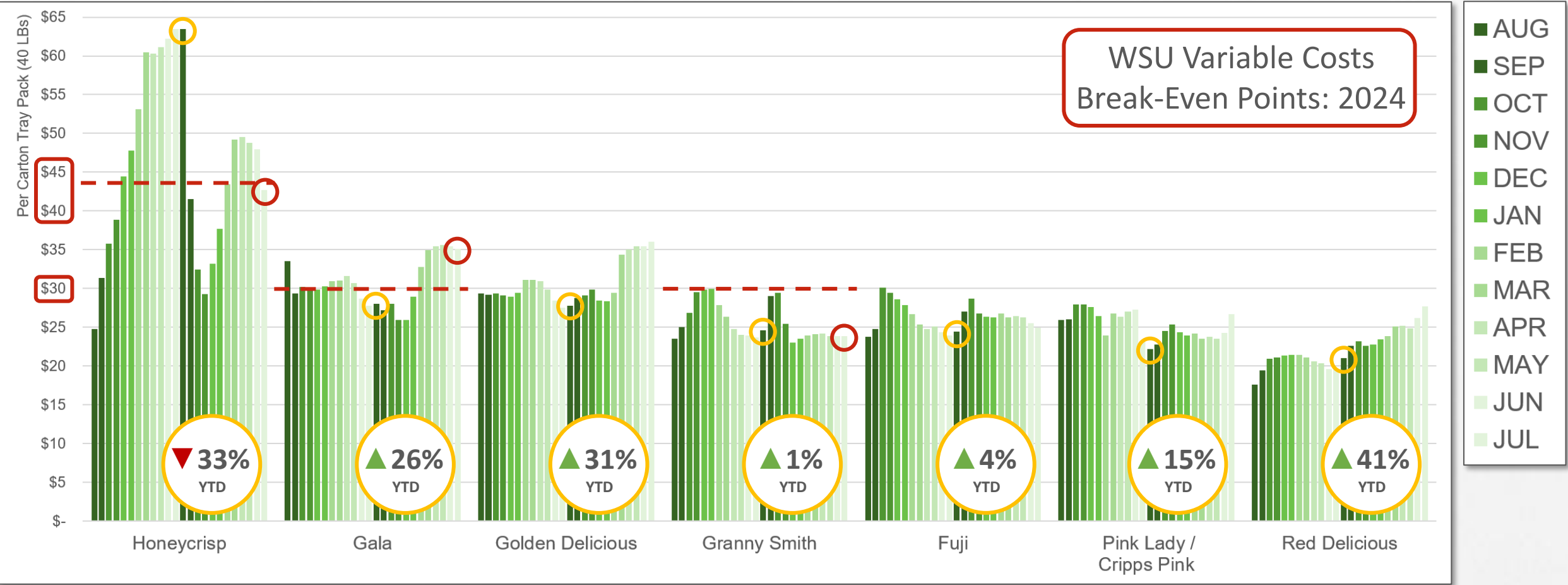
U.S. Fresh Grower Prices: 2023-2026



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

Sources: USDA, AMS; USApple

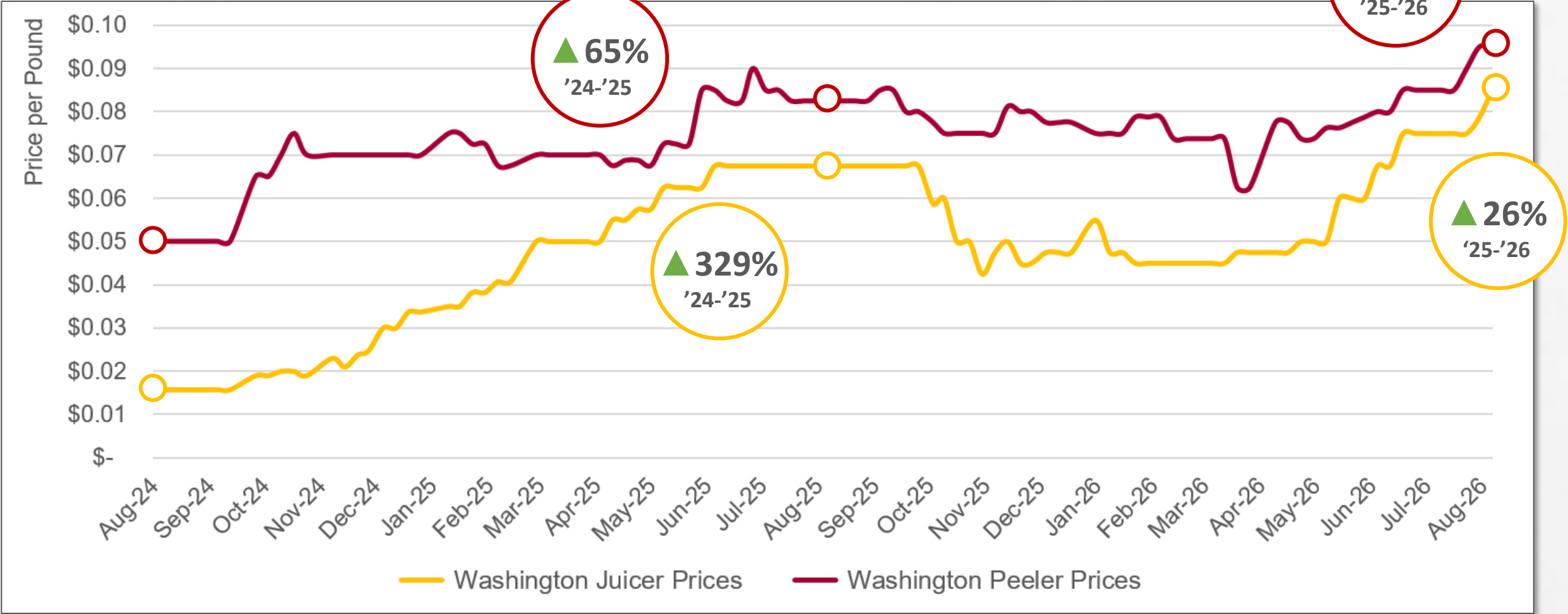
U.S. Fresh Grower Prices: 2024/25 & 2025/26



Sources: USDA, AMS; USApple

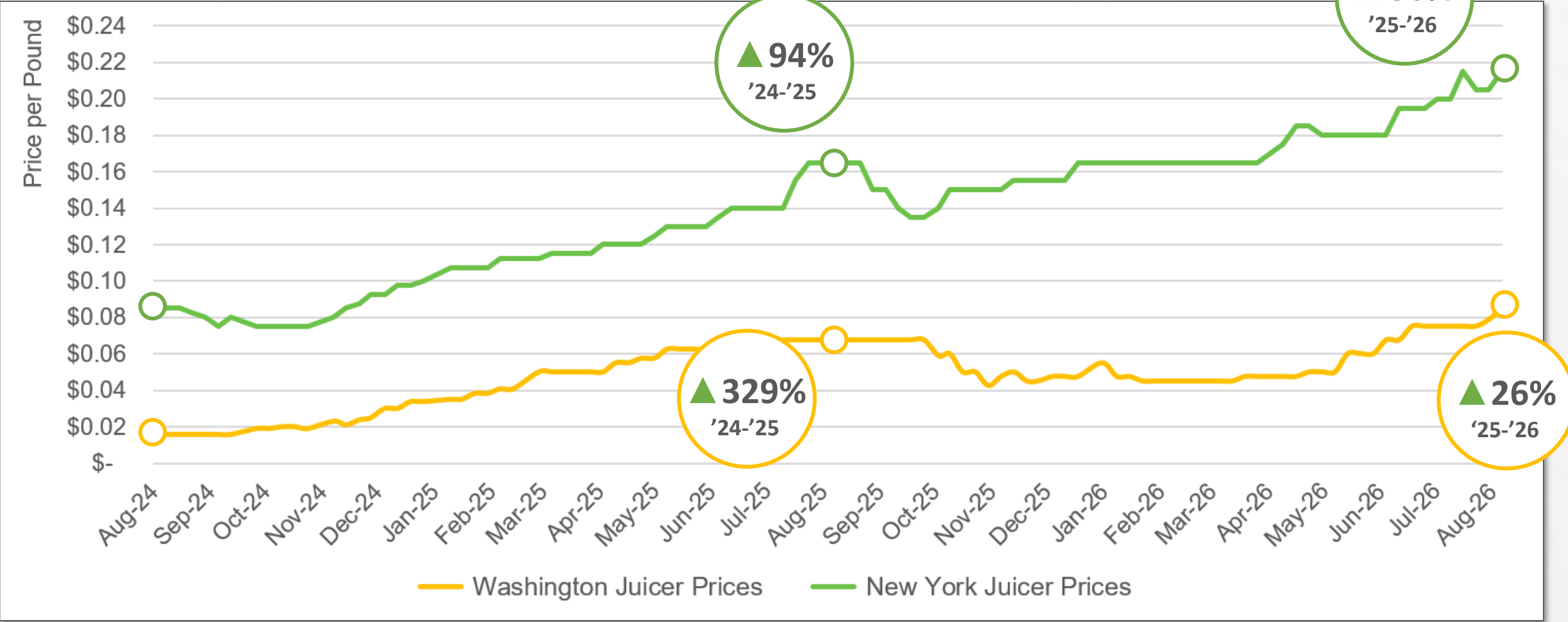
Prices represent national averages for carton tray packs, all item sizes, all grades.

WA Processor Prices: Juicers and Peelers



Sources: USDA, AMS; USApple

WA & NY Processor Prices: Juicers



Sources: USDA, AMS; USApple

U.S. Apple Demand Curves: 2000-2025

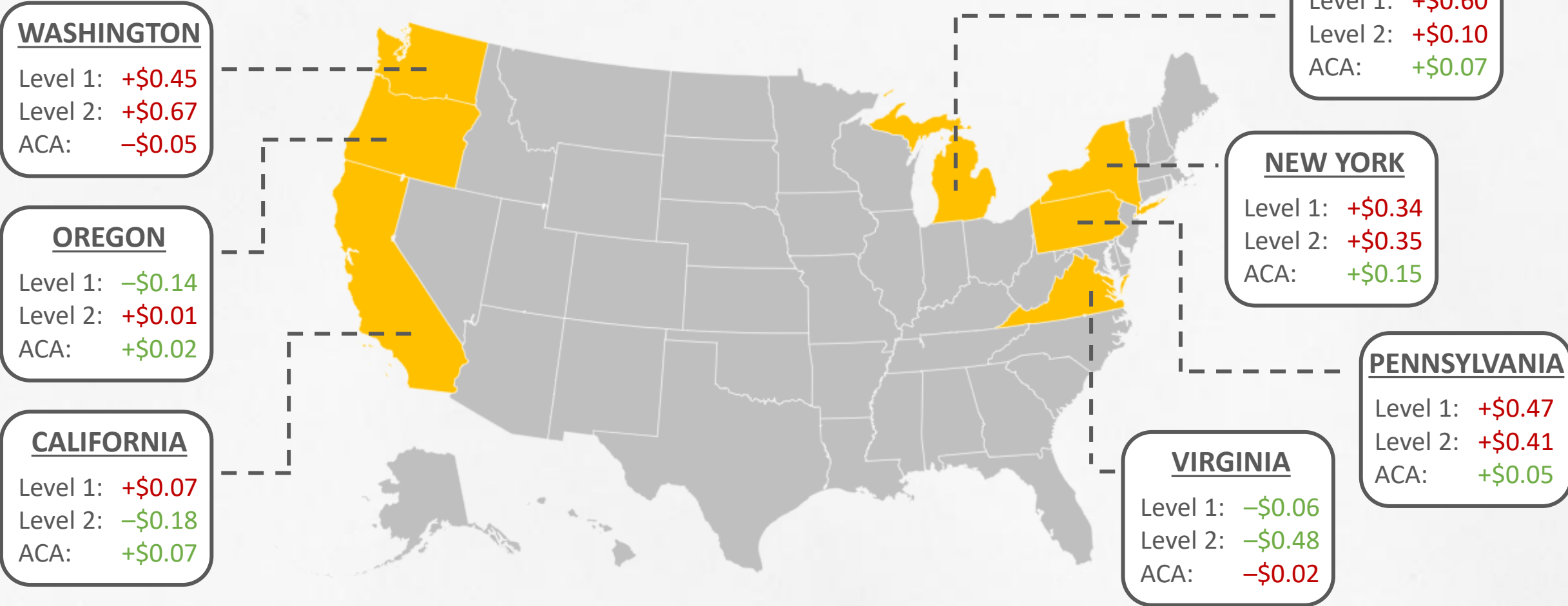
	Domestic Movement	Price (Inf. Adj.)
2000-2005	80 M BU	\$27 /BOX
2006-2011	87 M BU	\$32 /BOX
2012-2013	90 M BU	\$39 /BOX
2014-2023	110 M BU	\$35 /BOX
2024-2025	120 M BU	\$28 /BOX

Historical Break-Even Points?



Sources: USDA, AMS; USApple

U.S. Apple Cost of Labor: 2026/27 AEWRs

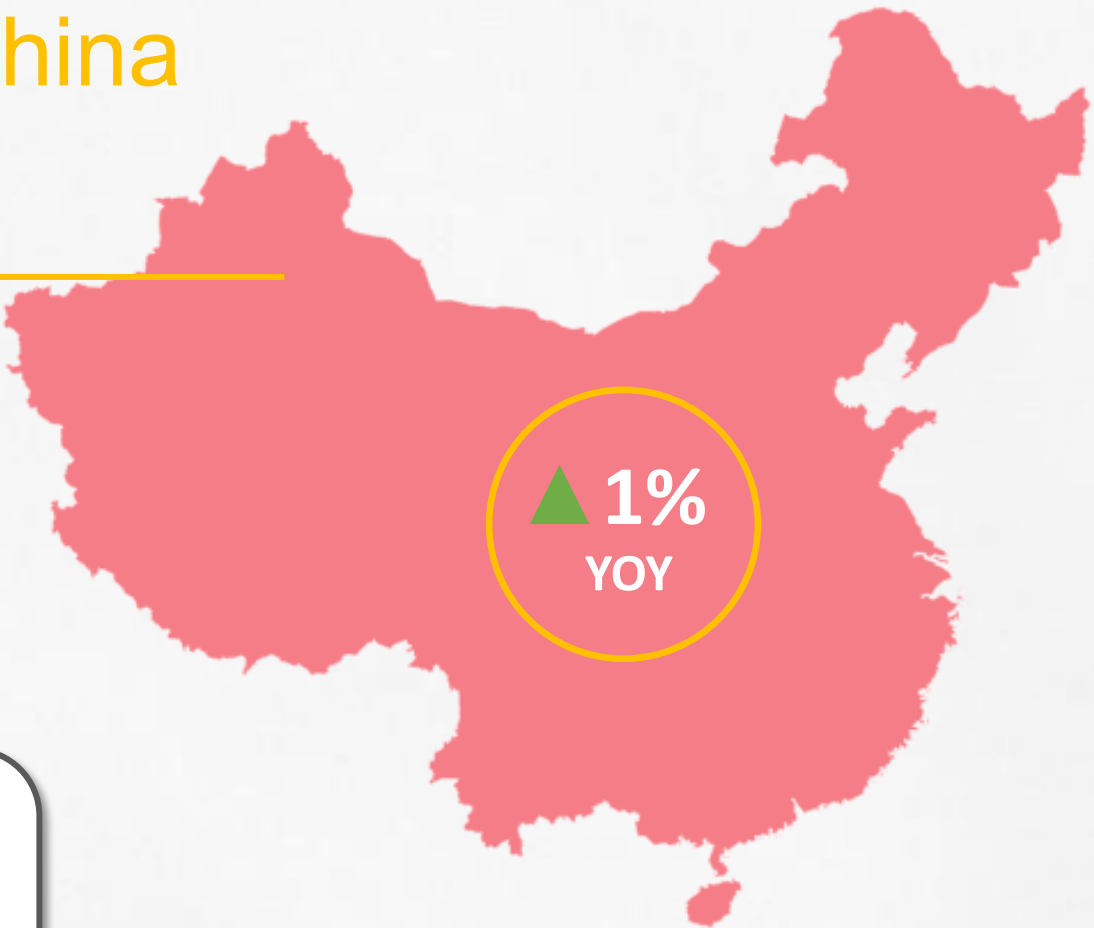


Sources: USDOL, ETA ; USApple

Data represent year-over-year changes in dollars per hour.

Global Apple Production: China

	WAPA (CFNA)		USDA, FAS
2023	1.9 B BU		2.4 B BU
2024	1.9 B BU ▲ 1% YOY		2.6 B BU ▲ 6% YOY
2025	1.8 B BU ▼ 6% YOY		2.5 B BU ▼ 5% YOY
2026	1.8 B BU ▲ 1% YOY		N/A



Top 5 Fresh Apple Export Markets ►

Viet Nam	\$178 M
Indonesia	\$161 M
Thailand	\$157 M
Philippines	\$137 M
Bangladesh	\$ 87 M

#1

Sources: WAPA; USDA, FAS; UN; USApple

Global Apple Production: Türkiye

WAPA				
2023	252	M BU		
2024	232	M BU	▼	8% YOY
2025	120	M BU	▼	48% YOY
2026	245	M BU	▲	104% YOY



Top 5 Fresh Apple Export Markets ►

India	\$76 M
Iraq	\$44 M
Russia	\$20 M
Saudi Arabia	\$15 M
Libya	\$11 M

#3

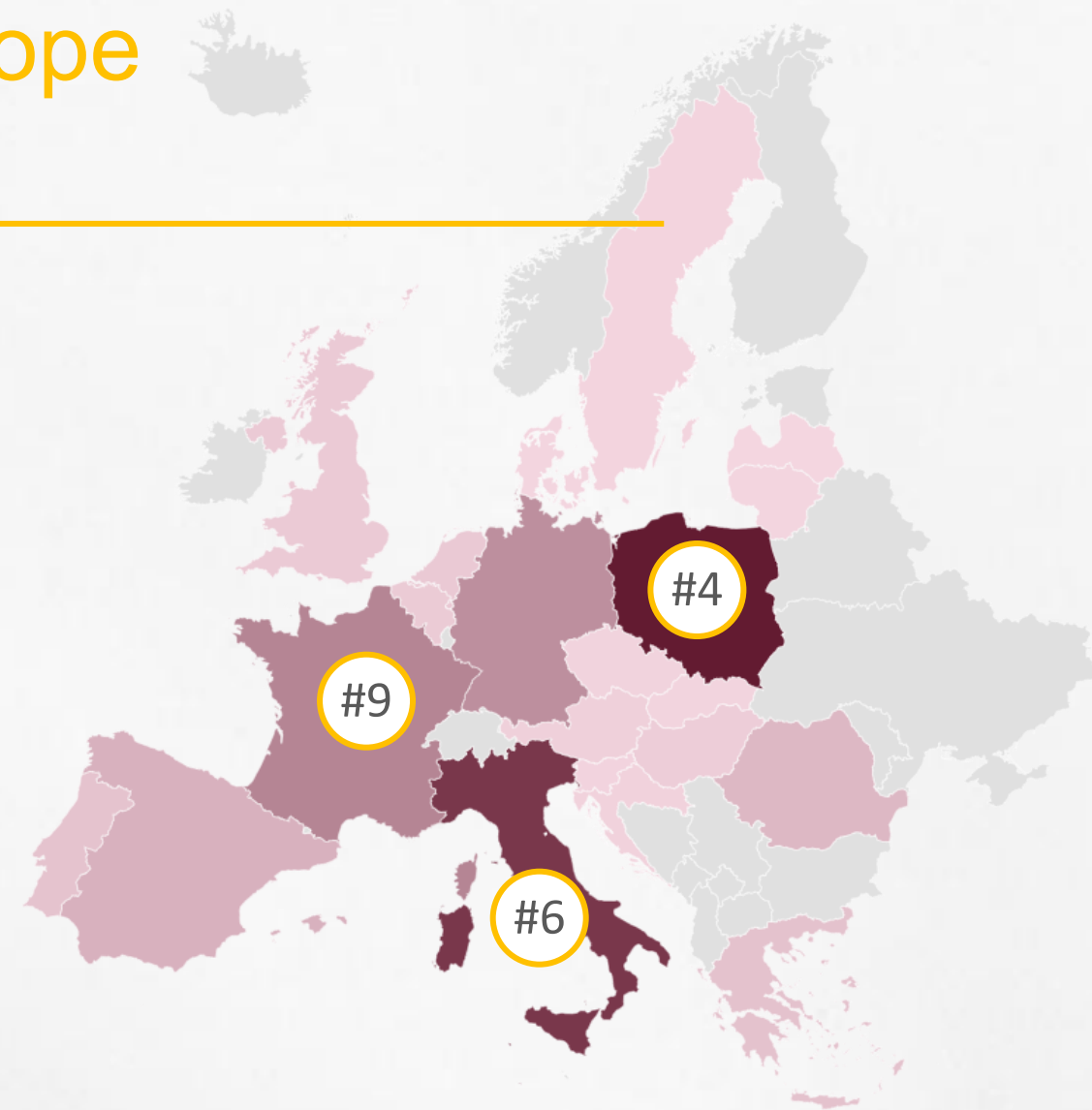
Sources: WAPA; USDA, FAS; UN; USApple

Global Apple Production: Europe

EUROPE	507 M BU	▼ 16% YOY
➤ POLAND	140 M BU	▼ 30% YOY
➤ ITALY	119 M BU	▼ 2% YOY
➤ FRANCE	61 M BU	▼ 24% YOY
➤ GERMANY	53 M BU	▼ 11% YOY
➤ SPAIN	28 M BU	▲ 8% YOY

Top 5 Fresh Apple
Export Markets: ➤
Poland

Germany	\$57 M
Romania	\$37 M
Egypt	\$35 M
Netherlands	\$32 M
India	\$30 M



Sources: WAPA; USApple

Global Apple Production: South America

BRAZIL

54 M BU ▲ 25% YOY

CHILE

46 M BU ▼ 5% YOY

ARGENTINA

27 M BU ▼ 7% YOY

Argentina, Brazil and Chile account for 94% of total South American apple production.



Sources: WAPA; USApple

Global Apple Production: Mexico & Canada

CANADA 19 M BU ▼ 2% YOY

Ontario 7.7 M BU ▼ 1% YOY

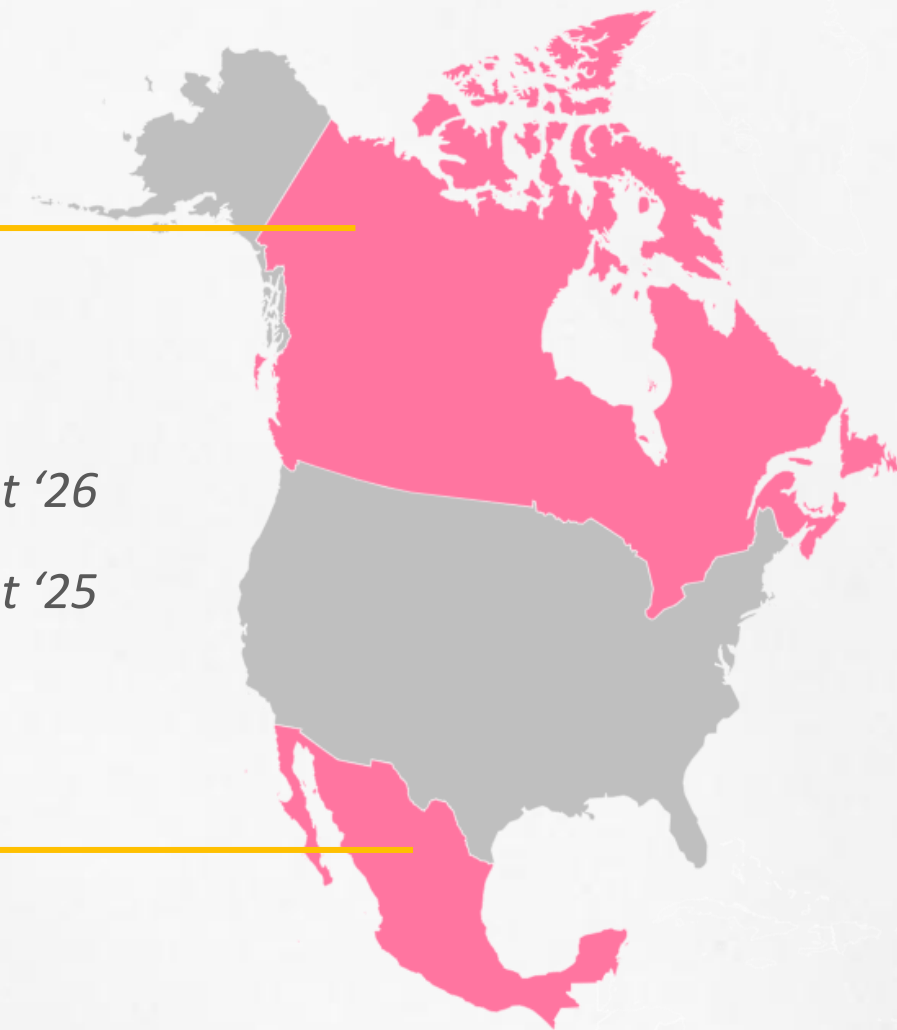
Quebec 5.7 M BU ▼ 5% YOY

British Columbia 3.0 M BU ▼ 13% YOY Drought '26

Nova Scotia 2.3 M BU ▲ 28% YOY Drought '25

New Brunswick 0.2 M BU ▼ 10% YOY

MEXICO 47 M BU ▼ 1% YOY



Sources: WAPA; Apples Canada/Pommes Canada; USApple

Key Takeaways



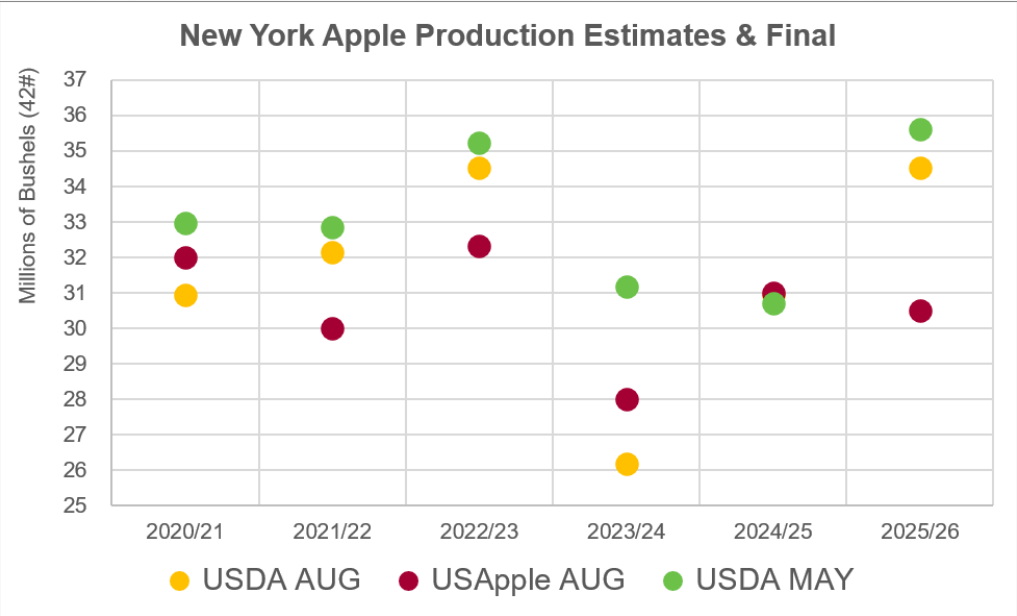
- ▶ *U.S. apple production in **2026/27** will come in below five-year averages due to significant weather events in the Mid-Atlantic region.*
- ▶ *Average grower prices still below the cost of production for many, but not all fresh varieties – processor prices strong – labor costs not increasing as they once have – **SAWA is crucial.***
- ▶ *Exports steadily gaining steam – must look for opportunities to expand exiting markets and open new markets – **USMCA is crucial.***
- ▶ *Despite export growth, supply capacity remains high and will continue to rise – **domestic demand is the missing piece** – apples must do more to educate consumers.*

USApple Adjustments

NY	USDA AUG	USApple AUG	USDA MAY
2020/21	30,952,381	32,000,000	32,976,190
2021/22	32,142,857	30,000,000	32,857,143
2022/23	34,523,810	32,333,333	35,238,095
2023/24	26,190,476	28,000,000	31,190,476
2024/25	30,952,381	31,000,000	30,714,286
2025/26	34,523,810	30,500,000	35,595,238
3-YR AVG	30,555,556	29,833,333	32,500,000
5-YR AVG	31,666,667	30,366,667	33,119,048

2026/27	32,142,857		*bushels (42#)
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USApple Adjustment	USDA Revision
3%	7%
-7%	2%
-6%	2%
7%	19%
0%	-1%
-12%	3%



USApple Survey

of Responses: 25

1. Do you think your total production (apples on the tree) will be higher, lower or the same as last year?

Higher: 8% Lower: 71% Same: 21%

2. Do you think your harvest volume (apples in the bin) will be higher, lower or the same as last year?

Higher: 21% Lower: 63% Same: 17%

3. Do you think the quality of your apples (apples sold fresh vs. processing) will be higher, lower or the same as last year?

Higher: 13% Lower: 29% Same: 58%

4. Do you think the USDA August production estimate for your state is too high, too low or just right?

Too High: 88% Too Low: 4% Just Right: 4% N/A: 4%

Please note, Washington does not plan to release a production estimate this year.

Given this decision, it will be up to each state/region to decide if they would like to make an official “adjustment” or not.



Thank You!



*Better data,
better decisions.*

Chris Gerlach

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