US Apple Outlook 2026

Presented by:

Tom Barnes, President and CEO, Category Partners

Julie DeJarnatt, Founder and Board Member, Eat More Apples

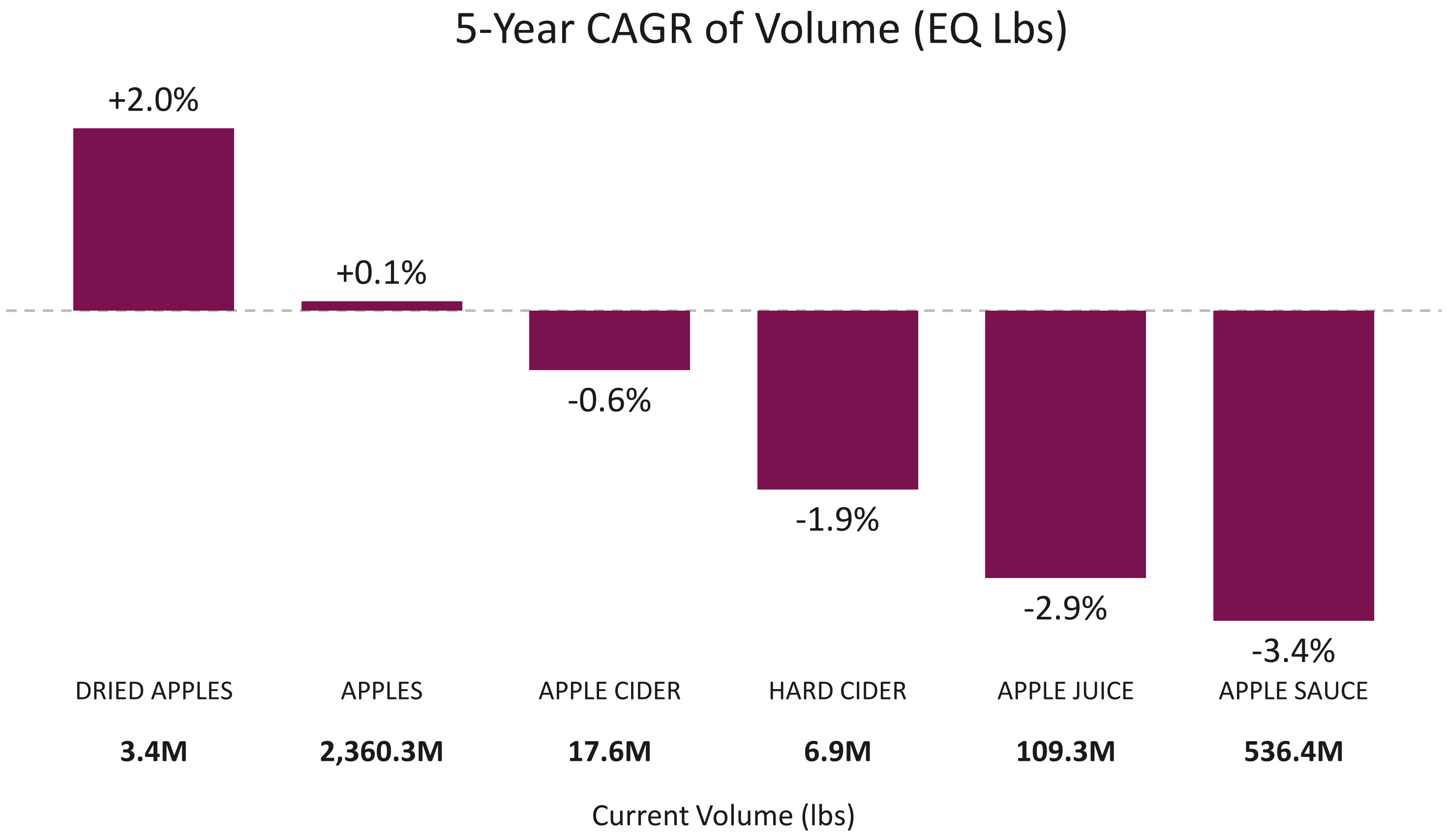
Agenda

- Apple Retail Performance
- Consumer Sentiment & Perception
- Eat More Apples Survey Results
- Whatever Julie wants to put here

Methodology

- Data Source: **Economic Data**
  - University of Michigan, Consumer Confidence
- Data Source: **Consumer Surveys**
  - Category Partners; Consumer Shopper Survey, July 2026
  - Eat More Apples; Measuring Consumer Awareness and Opinions of Apples, November 2025
- Data Source: **NIQ Syndicated Data**
  - Total U.S. xAOC
    - "xAOC" includes all grocery, mass, and club
  - Categories are shown across all departments
    - Example: Dried Apples includes both Produce and Grocery departments
  - 5 Years grouped into 52-week increments
    - 2026 = Most Recent 52Wks Ending July 25th, 2026
    - 2025 = Most Recent 52Wks Ending July 26th, 2025
    - 2024 = Most Recent 52Wks Ending July 27th, 2024
    - 2023 = Most Recent 52Wks Ending July 29th, 2023
    - 2022 = Most Recent 52Wks Ending July 30th, 2022

Apple Products – 5Yr CAGR of Volume



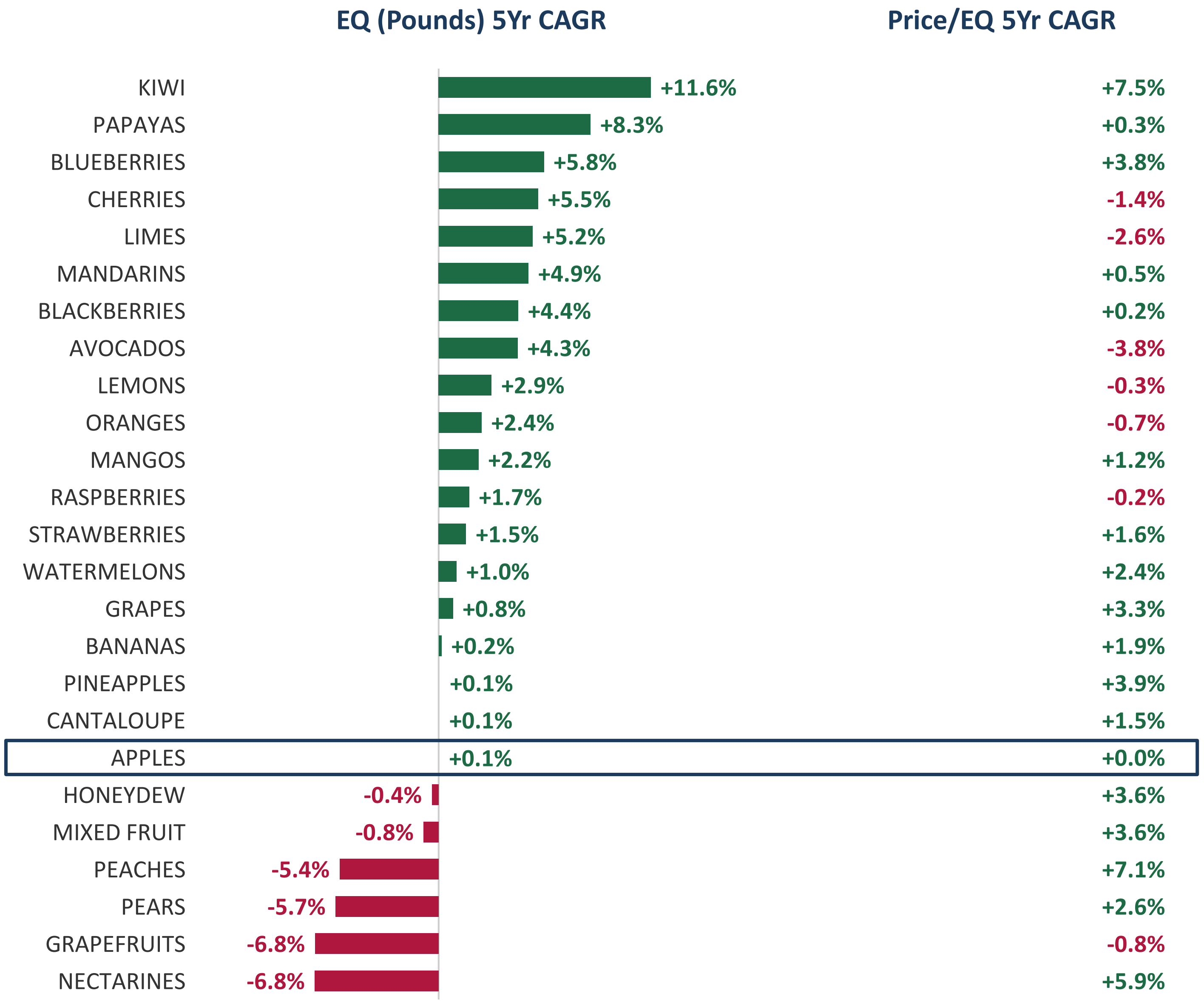
- Dried Apples is the only apple product posting a positive 5-Yr EQ CAGR (+2.0%), though it remains a small volume base at 3.4M lbs
- Apple Sauce (-3.4%) and Apple Juice (-2.9%) post the steepest 5-Yr declines, despite being the largest volume pools behind Apples itself (2,360.3M lbs, +0.1% CAGR)

NIQ Syndicated Data; Total US xAOC; 5Yr CAGR = Latest 52 Wks Ending 7/25/26 vs. Latest 52 Wks Ending 7/30/22; Current Volume = Latest 52 Wks Ending 7/25/26

Top 25 Fruits 5Yr CAGR: Volume & Price

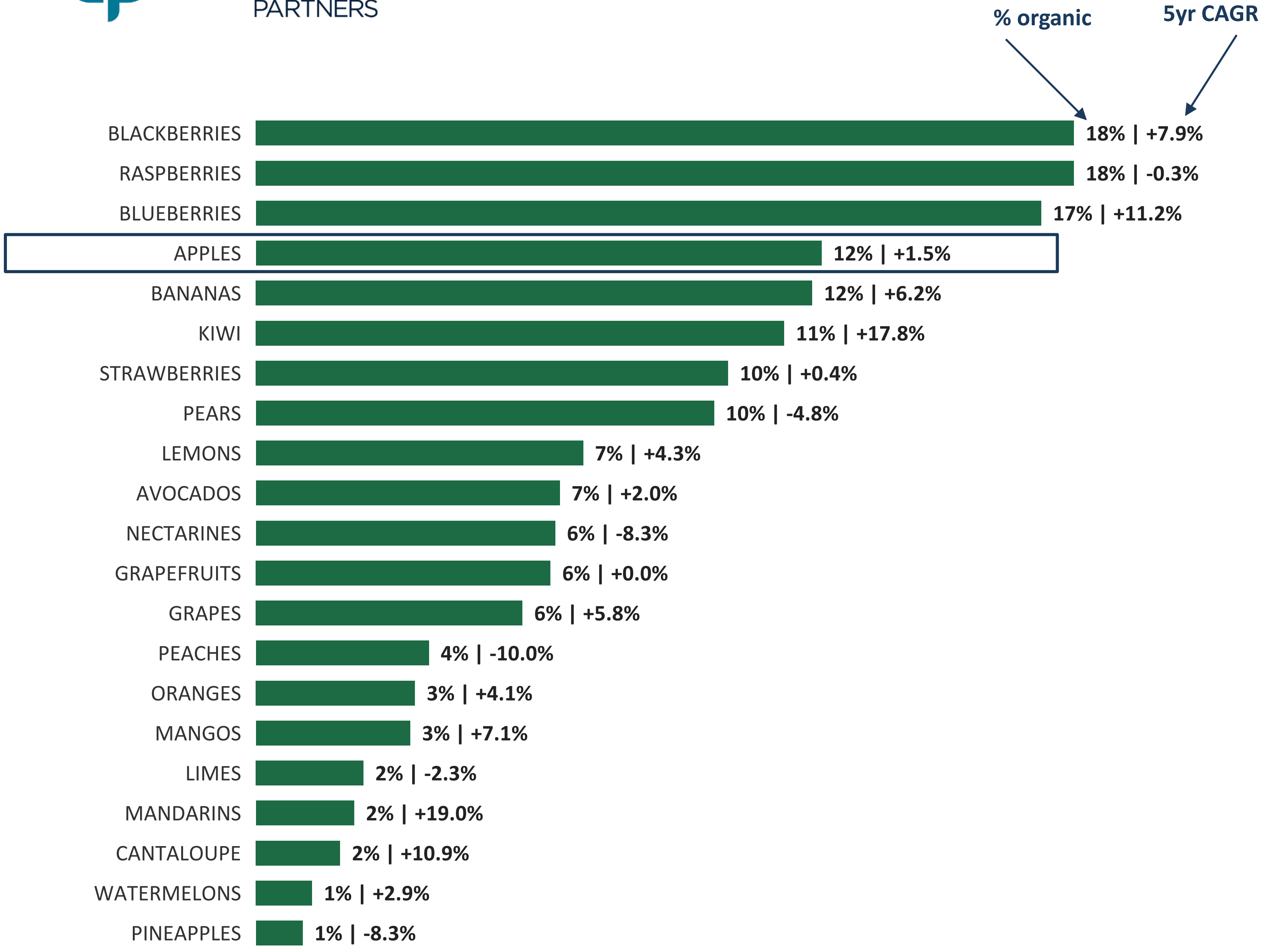
- Kiwi, Papayas and Blueberries post the strongest 5-Yr EQ (volume) growth, all with CAGRs above 5%
- Nectarines and Grapefruits show the steepest volume declines, both near -6.8% CAGR
- Apples – the largest category by volume – are essentially flat on both volume and price over the period

CATEGORY PARTNERS



NIQ Syndicated Data; Total US xAOC; 5Yr CAGR = Latest 52 Wks Ending 7/25/26 vs. Latest 52 Wks Ending 7/30/22

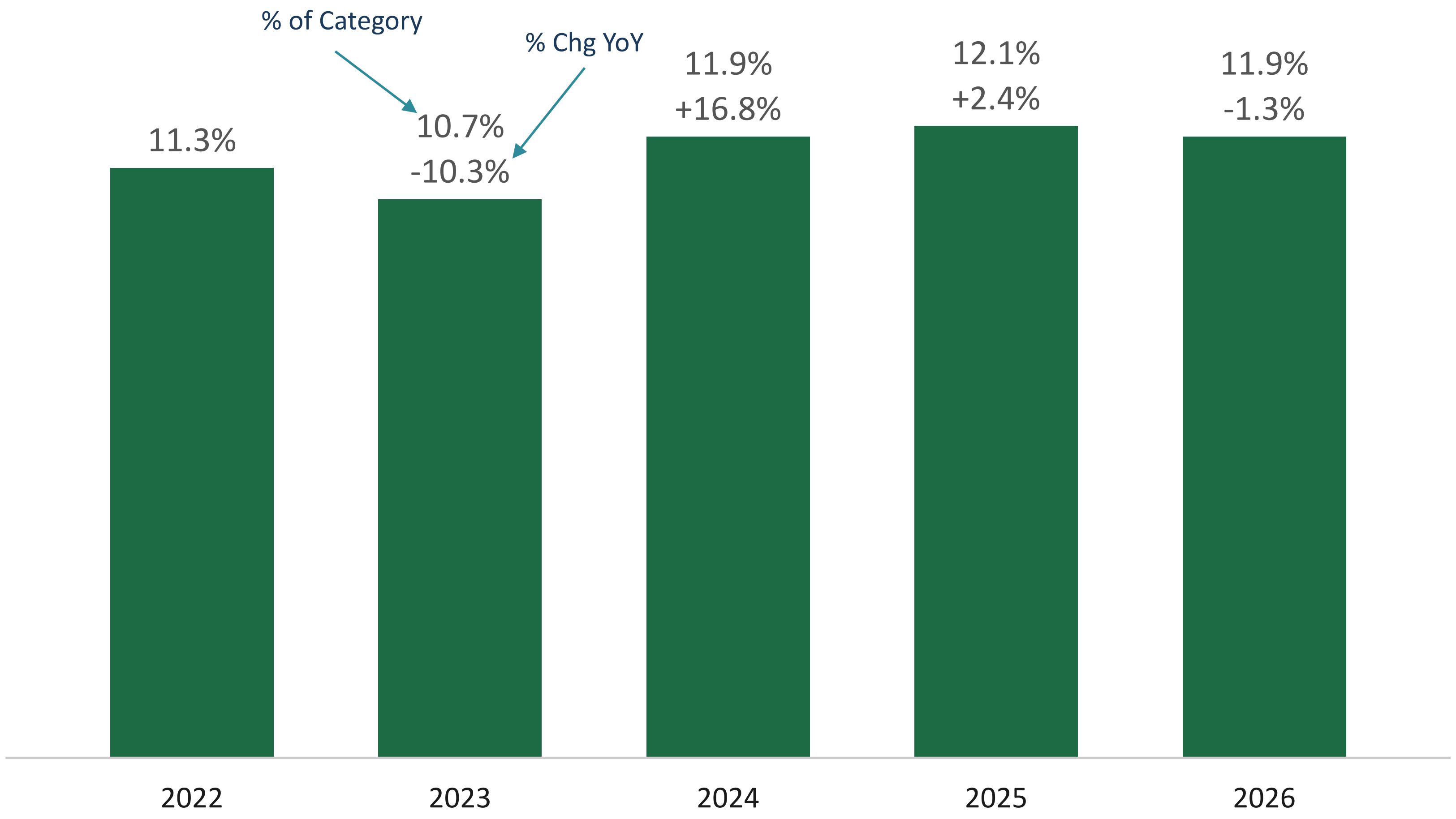
Top 21 Fruits by Organic Volume



- Organic Blackberries and Blueberries have made big gains over the past five years, while Raspberries held roughly flat
- Apples, at 12% organic share, has a healthy mix compared to other top fruit categories

NIQ Syndicated Data; Total US xAOC; % Organic = Organic EQ / Total EQ, Latest 52 Wks Ending 7/25/26; 5Yr CAGR = Organic EQ, Latest 52 Wks Ending 7/25/26 vs. Latest 52 Wks Ending 7/30/22

Organic Apple Performance – Volume (EQ)

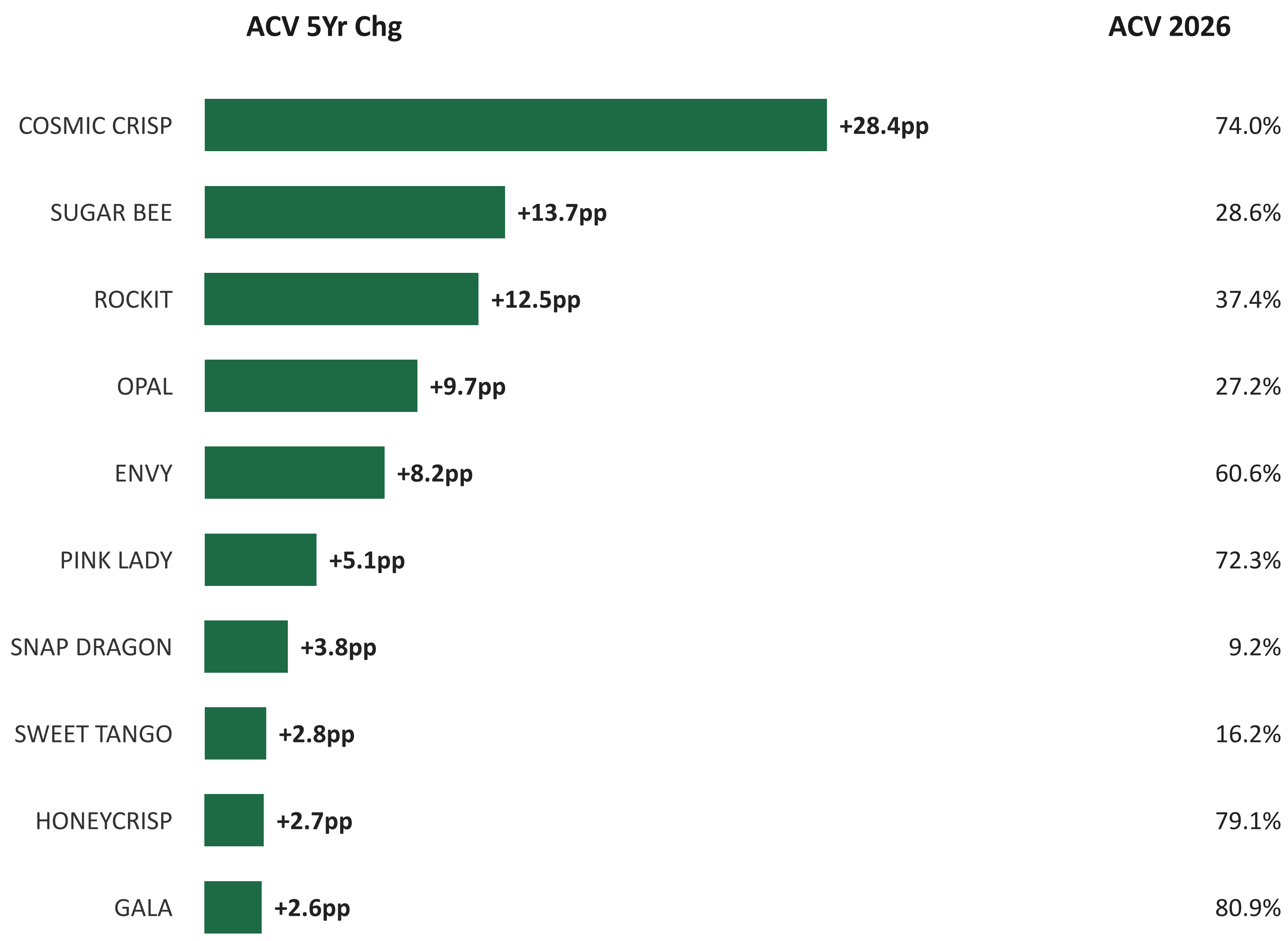


- Organic Apples dipped through 2023 amid inflationary pressure on the consumer, rebounded sharply in 2024, and has since leveled off

NIQ Syndicated Data; Total US xAOC; % of Category = Organic EQ / Total Apples EQ; % Chg YoY = YoY change in Organic EQ; years reflect Latest 52 Wks periods ending 7/30 (2022) through 7/25 (2026)

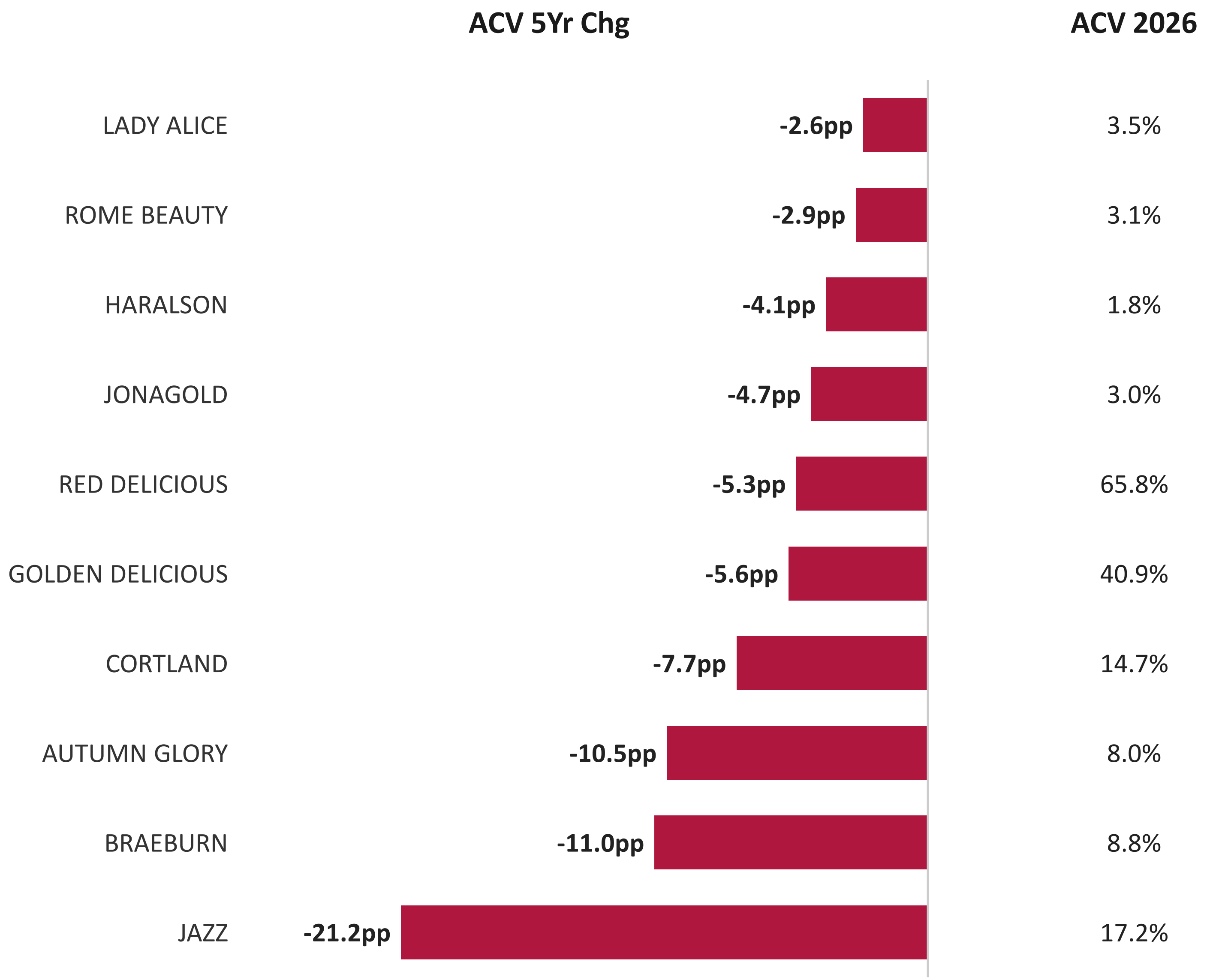
Distribution by Variety

- Many of the top varieties to gain distribution still have less than 70% total distribution



NIQ Syndicated Data; Total US xAOC; ACV 5Yr Chg = ACV%, Latest 52 Wks Ending 7/25/26 vs. Latest 52 Wks Ending 7/30/22

Distribution by Variety



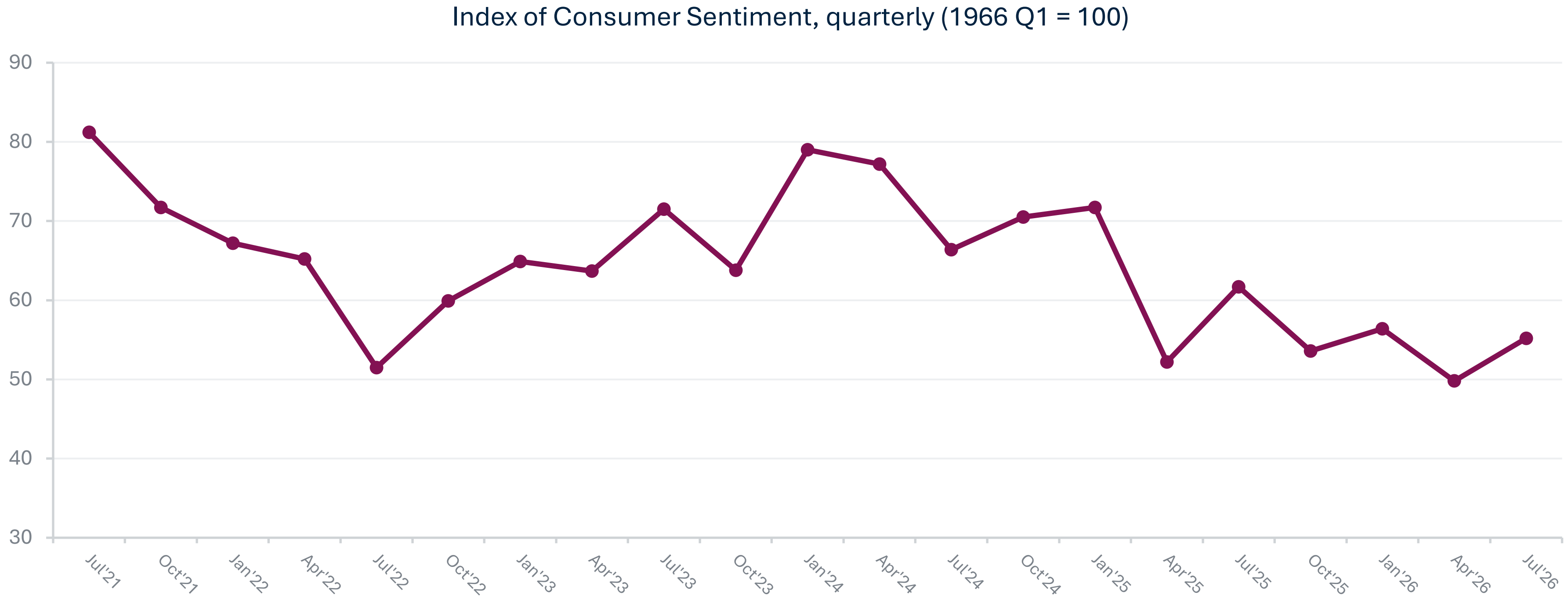
- Red Delicious drops below 70% distribution in the US
- Golden Delicious now at 41% distribution

NIQ Syndicated Data; Total US xAOC; ACV 5Yr Chg = ACV%, Latest 52 Wks Ending 7/25/26 vs. Latest 52 Wks Ending 7/30/22

Consumer Sentiment Remains Deeply Depressed by Historical Standards

55.2

Index of Consumer Sentiment, Jul 2026 — 8pts below the 5-yr average (63.2) and ~31pts below the 2000–2019 norm (85.8)



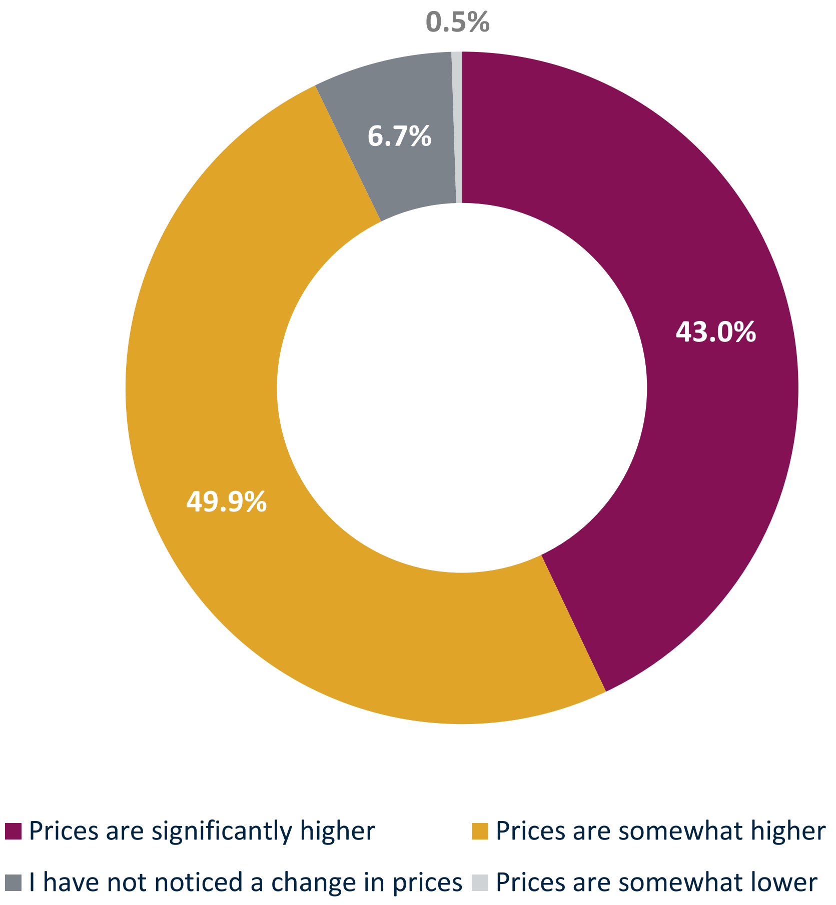
WHAT IT MEANS

Sentiment has not stabilized at a healthy level — it remains near the bottom of its 5-year range and far below pre-pandemic norms. The July uptick is a bounce off a historic low, not a recovery.

Source: University of Michigan Surveys of Consumers, Index of Consumer Sentiment, quarterly.

Perceived Price Changes

While grocery shopping in the past year or so, have you noticed a change in prices of fresh fruits and vegetables?



92.9%

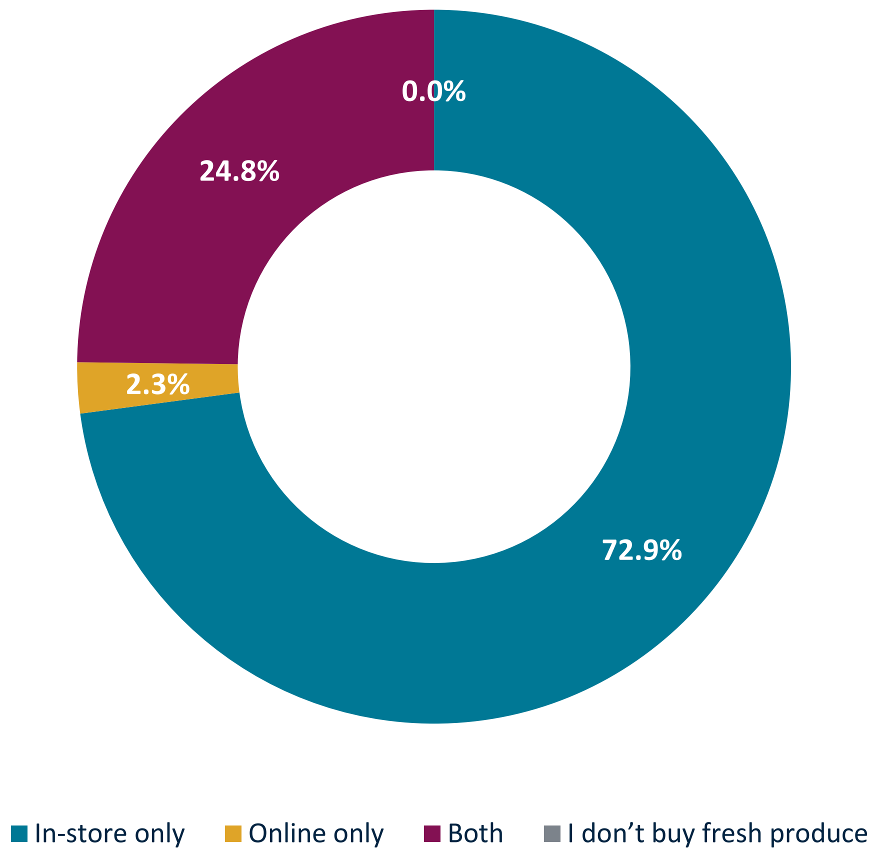
have noticed higher produce prices in the past year

Price inflation is near-universally felt: virtually every shopper has noticed higher produce prices, with 4 in 10 calling the increase significant.

CATEGORY PARTNERS

In-Store vs. Online Produce Purchasing

Do you purchase fresh produce in-store or online?



Produce purchasing remains an overwhelmingly in-store behavior — shoppers still want to see and select fresh items themselves.

72.9%

buy produce in-store only

13.8%

Of online shoppers purchase produce more online this year than last

GLP-1 Usage and Its Impact on Apples

CATEGORY PARTNERS

eat more apples™

15%

CURRENTLY TAKE OR HAVE TAKEN GLP-1 MEDICATIONS FOR WEIGHT LOSS

10% Currently take

6% Have taken, not now

84% Have never taken

1% Prefer not to answer

Reflects 9.7% who currently take GLP-1s plus 5.6% who have taken them previously.

46%

OF GLP-1 USERS ATE MORE APPLES WHILE ON THE MEDICATION

46% Apple consumption increased

44% Stayed the same

10% Decreased

Fruit consumption overall also rose for 52% of GLP-1 users — apples are keeping pace.

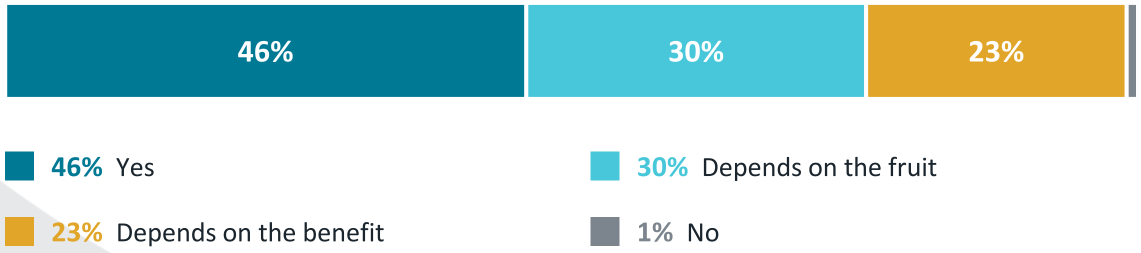
GLP-1 use is still limited today — but among users, apples are already capturing a share of the resulting rise in fruit consumption.

Source: Category Partners, Measuring Consumer Awareness and Opinions of Apples, November 2025; GLP-1 usage reflects 9.7% currently taking + 5.6% previously taking GLP-1 medications (15.2% combined, rounded for chart display).

Health Knowledge Changes the Decision

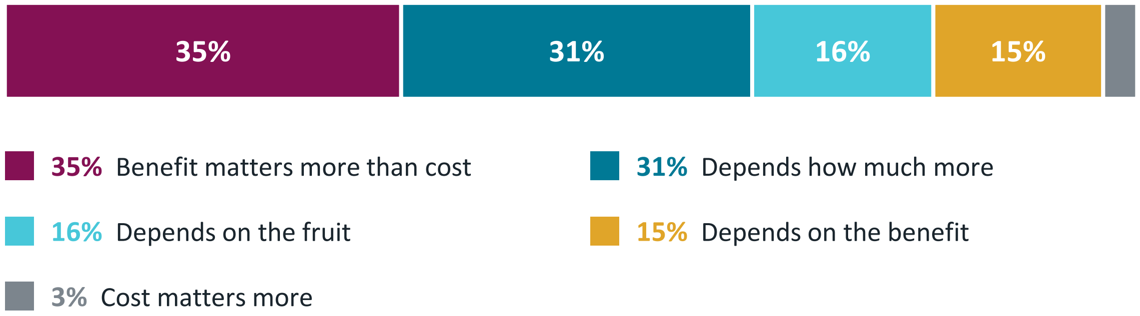
46%

WOULD BUY MORE FRUIT ONCE THEY KNOW THE HEALTH BENEFIT



35%

SAY A KNOWN HEALTH BENEFIT MATTERS MORE THAN PRICE

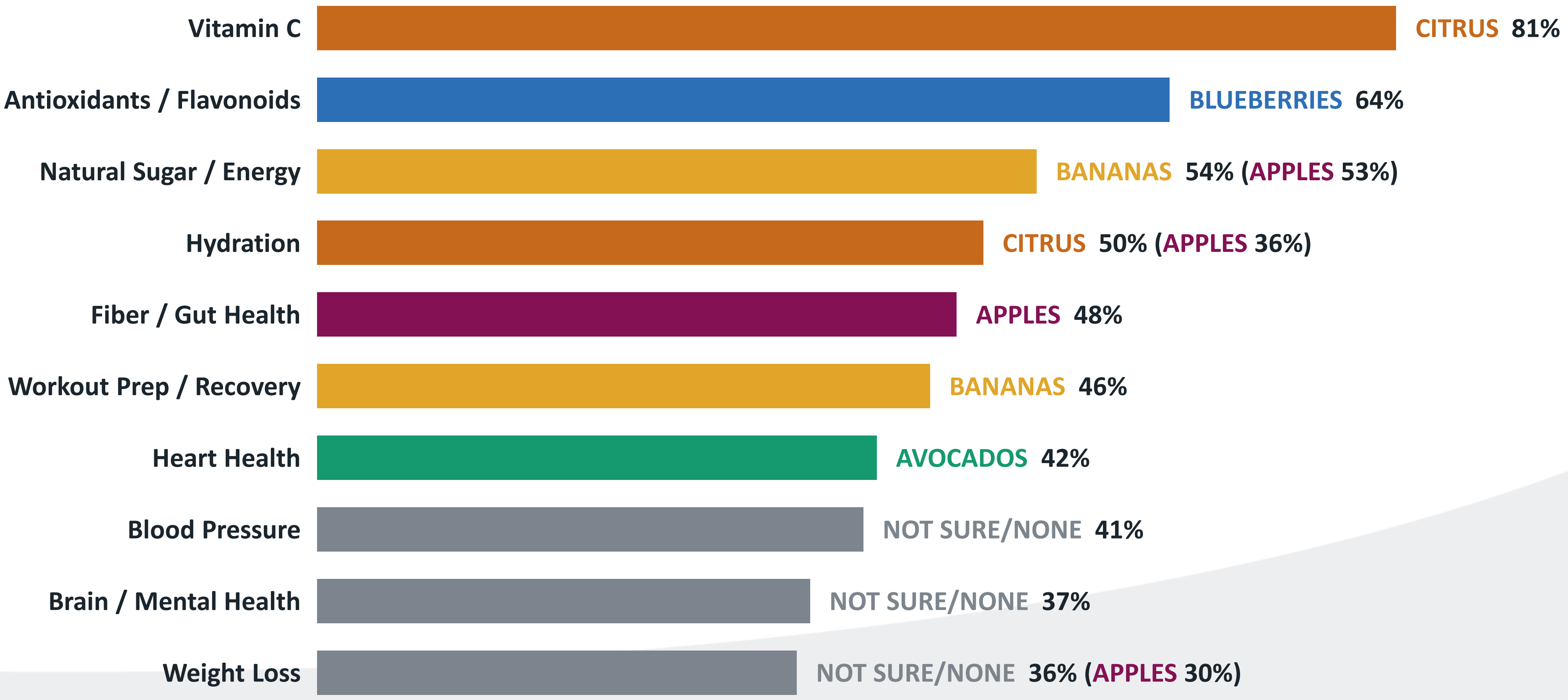


Health education motivates the vast majority of consumers — on both purchase intent and price sensitivity.

Source: Category Partners, Measuring Consumer Awareness and Opinions of Apples, November 2025

Which Fruit Wins Each Health Category?

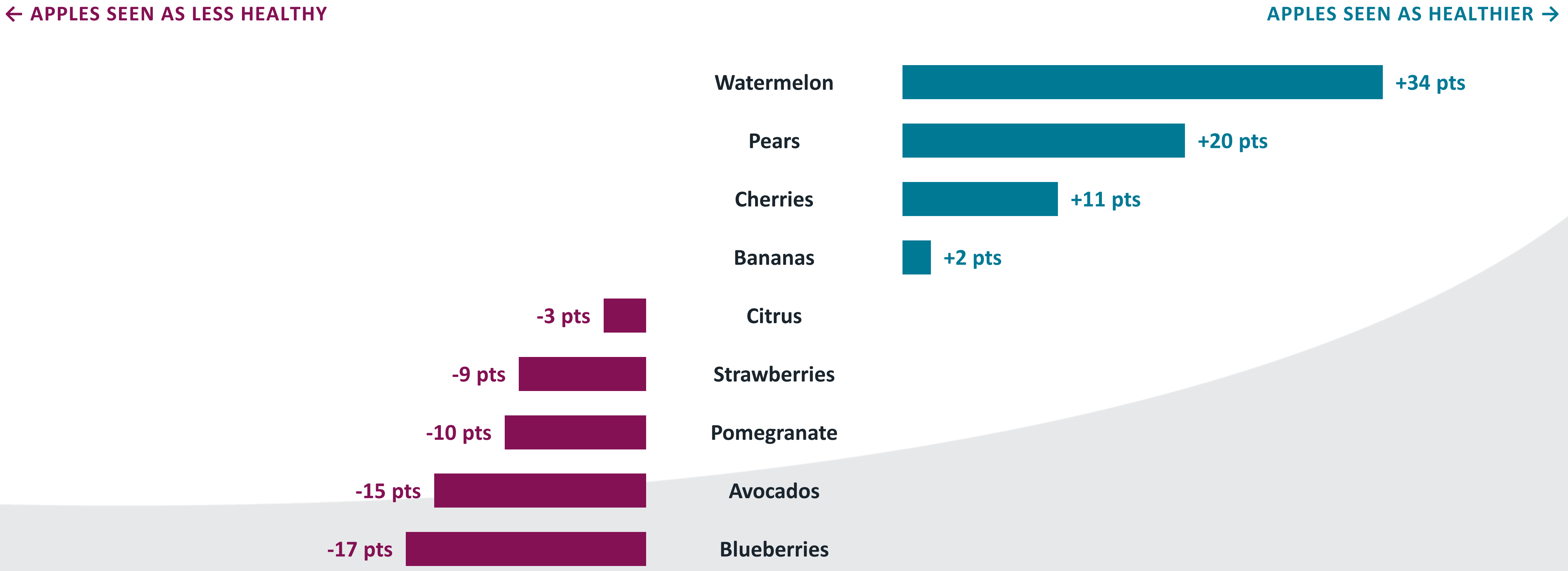
Apples lead just 1 of 10 categories — 3 categories are up for grabs



Source: Category Partners, Measuring Consumer Awareness and Opinions of Apples, November 2025; winner = highest-response fruit (or "Not Sure/None") for each benefit.

Health Benefits of Apples vs. Other Fruits

Apples rate ahead of watermelon, pears, and cherries — but trail blueberries, avocados, and pomegranate.



Source: Category Partners, Measuring Consumer Awareness and Opinions of Apples, November 2025; Net score = share saying apples have MORE health benefits minus share saying FEWER ("about the same" responses excluded).

eat more apples™

A collective investment in apples.

A unified industry voice to grow demand, change perception, and put apples at the center of every routine.

August 2026 · Investor Brief

Eat More Apples was created to do two things

01

Increase consumption.

Get apples into more hands, more often — across every meal and moment.

02

Change perception.

Make the apple's full story visible, valued, and chosen by every generation.

Everyone knows apples.

How do we get them to eat more?

72%
buy fruit for health benefits.

35%
say “apples” when they do.

The gap

37 points of value we've never claimed.

The fruit everyone recognizes —
and the story no one is telling.

Apples are familiar.

Their value isn't.

We must make the apple's full value — **body, routine, life** — impossible to miss.

No single apple brand can change the perception of apples.

But together, we can.

Growers
All regions. All varieties.

Packers
Operations & logistics.

Marketers
Brand & retail partners.

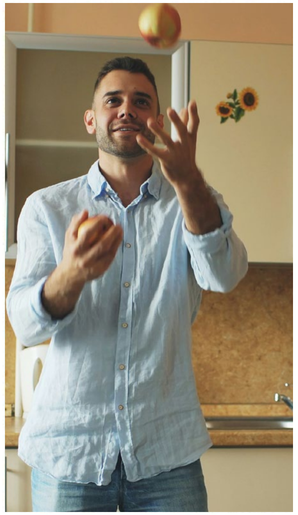
Eat More Apples
One unified mission.

Let's come together around something bigger.

Make the next generations see apples as the **easy, satisfying, feel-good choice** for:

School mornings.
Workday snacks.
Family routines.
Everyday wellness.


GOOD
to the core.


GOOD to the core.

What it signifies

A shared commitment to represent the whole industry with a clear, credible national voice — one that supports every region, variety, and brand by **growing demand for fresh apples.**

What it does

Gives growers, packers, marketers, and industry partners **one shared platform** to make apples more visible, more valued, and more frequently chosen.

What GOOD to the core. makes possible.

Body

Good for your body.

Credible nutrition, fiber, and wellness.

Routine

Good for your routine.

School mornings, snacks, meal prep.

Life

Good for your life.

Memories, flavor, family traditions.

It is a **flexible, enduring platform designed to evolve** with consumers, seasons, varieties, regions, retailers, and brands.

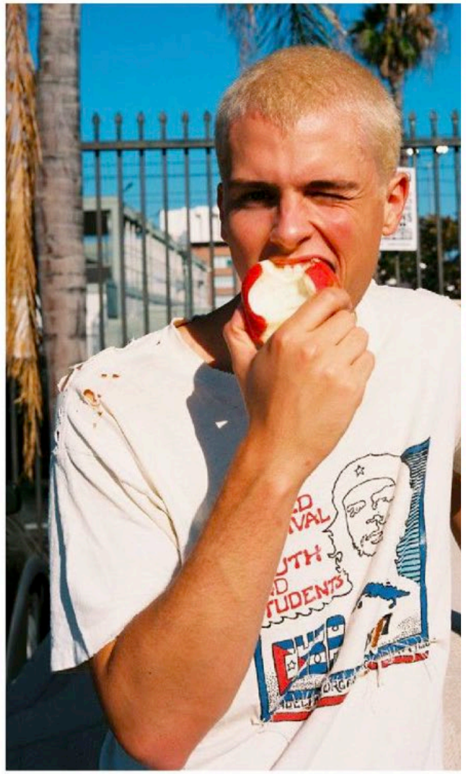
Built for every apple story.

Good to the Core creates an enduring way for consumers to find an apple for the moment they are in.

1. A simple platform that **fits any format, region, or budget** — no reinvention needed.

2. **Comes to life** through media, retail, content series, partnerships, and cultural moments.

3. Seamlessly integrates Eat More Apples™ — **amplifying the whole industry's voice**.



From awareness to consumption.

Step 01

Visible.

Build understanding of flavor, nutrition, and benefits.

Media · PR · Culture

Step 02

Valued.

Bring apples to life in everyday moments.

R&D · Education · Stories

Step 03

Preferred.

Turn inspiration into repeat purchase.

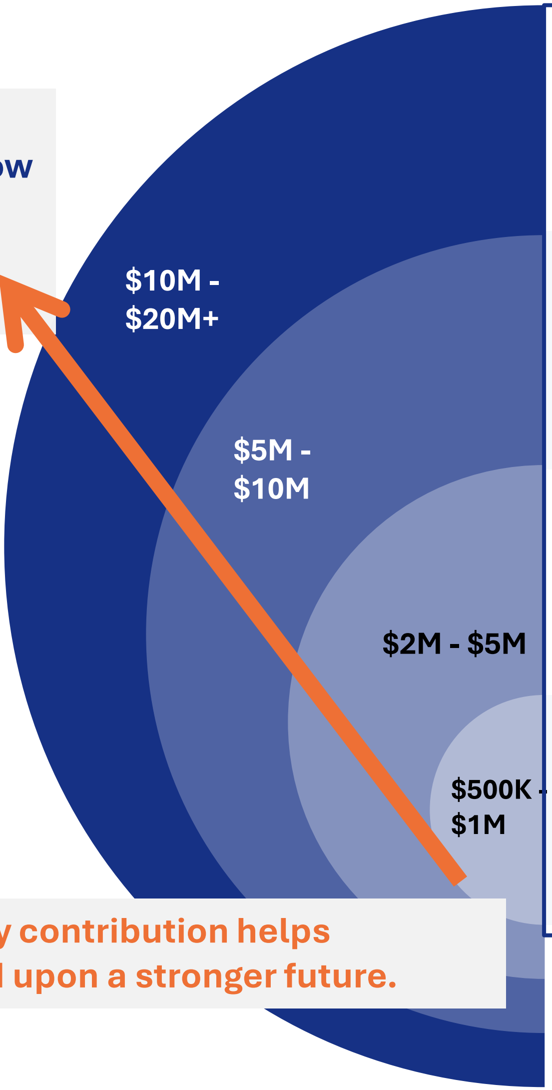
Retail · Community · Content

No single activation alone grows consumption. A connected system does.

THIS IS WHERE YOU COME IN.

Imagine a world where:

Greater collective investment expands how visible, relevant, and accessible apples can become



Every contribution helps build upon a stronger future.

Apples become America's most relevant everyday fruit.	**Become a cultural force.** A multi-year national movement creates ongoing presence across media, culture, retail, community, and consumer routines — with measurable long-term demand growth.
Apples become a visible force in healthy snacking.	**Drive Scale & Impact** National partnerships, expanded retail participation, experiential moments, and major tentpole activations move the platform from awareness toward sustained behavior.
Apples show up in more of the moments that shape daily choices.	**Build Momentum** The movement builds momentum through paid media, retail partnerships, RD and creator programs, regional activation, and an inaugural Good to the Core Week.
Apples have a new, national voice.	**Establish the Foundation** Good to the Core launches with foundational creative, trusted voices, earned media, social content, consumer education, and a measurable baseline.

Your investment helps secure the future of apples.

More visible.

In the moments consumers decide.

More valued.

For the goodness already inside.

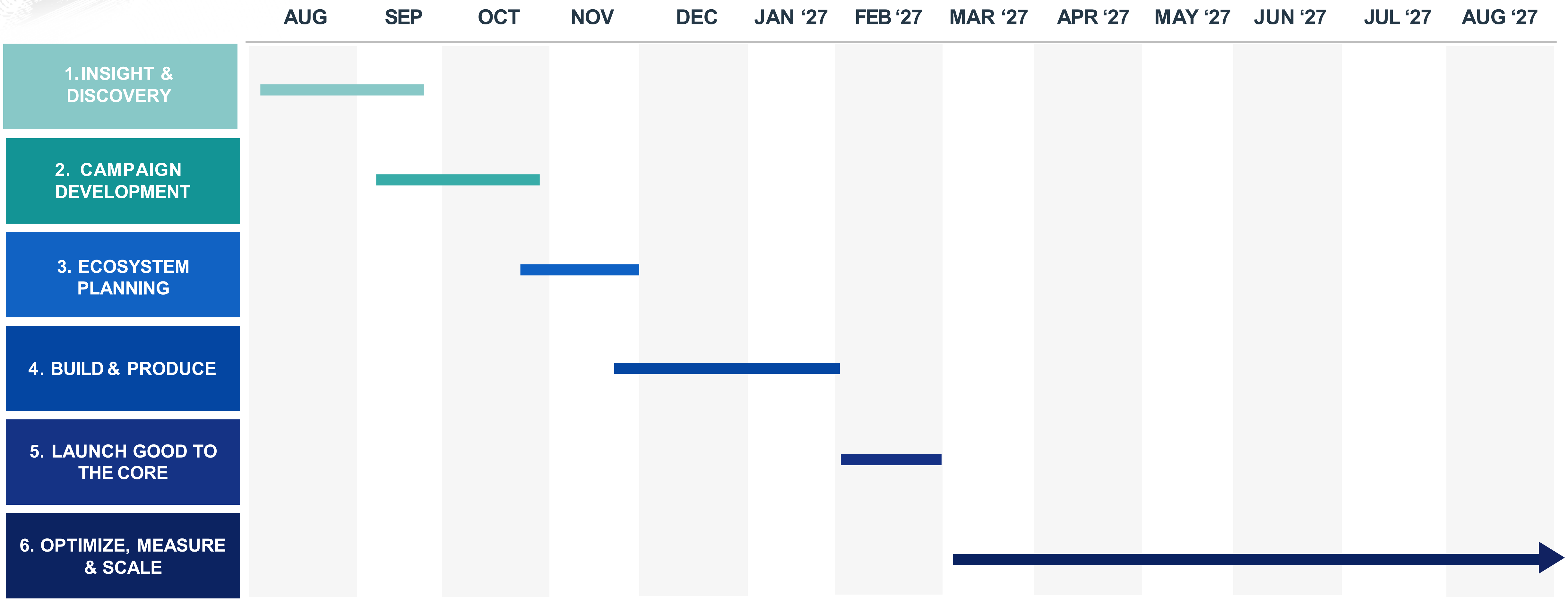
More chosen.

Homes, carts, and routines.

For the product — and the people — at **the core** of this industry.

Timeline

Illustrative timeline based on a Fall 2026 campaign start. Timing and sequencing will be refined based on final scope, funding and stakeholder alignment.



Be part of something bigger than one variety, one region, one grower.

Come build together what none of us can build alone.

The table only works if everyone sites down.

Founding investors do not wait. They lead, they shape the campaign, and they make sure the lift reaches the whole industry, including the farms that cannot yet give.

Two futures for the American apple.

If we wait

- Yields keep rising while demand stays flat
- Price pressure compounds, season after season
- Family farms absorb the loss
- Every grower waits for someone else to fix it

If we act together

- Awareness rises and pulls consumption with it
- Pricing stabilizes across the season
- Volume moves through packers and retailers
- The industry owns a lasting demand engine

The wind is at our backs.

A national real food moment

The 2025 to 2030 Dietary Guidelines put whole fruit back at the center of healthy eating.

Farmers first policy

Federal priorities now favor growing domestic demand for American grown crops.

A federal catalyst in play

Eat More Apples is actively pursuing federal funding to amplify, not replace, industry dollars.

GLP-1 users eat more fruit

About half of those on the medication reported eating more fruit and more apples.

Two ways in, one shared mission.

You participate in the way that fits your situation. The mission is the same either way.

Eat More Apples

501(c)(6) trade entity

For businesses and the industry.

Your company invests in the trade effort that grows demand for everyone in the supply chain.

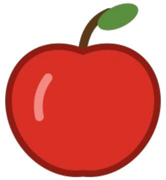
Eat More Apples Fund

501(c)(3) nonprofit

For individuals.

A national nonprofit educating consumers on the health benefits of fresh apples. Personal gifts may be tax deductible.

Eat More Apples Tiers: The Investment Framework



Apple Seed
$20,000

- Year Dated “EMA Investor” Seal
- Website supporter listing
- Only through 2026 ”Founding Investor” designation

Sapling
$50,000

- Seed benefits +
- Annual apple consumption research report
- Named recognition in EMA written publications
- Annual convening recognition

Blossom
$100,000

- Sapling benefits +
- Invitation to annual industry roundtable
- Named recognition during EMA speaking opportunities

Orchard
$250,000

- Blossom benefits +
- First look at market activity and campaign data
- Executive roundtable access
- Opportunity to host EMA convened grower listening sessions
- Inclusion in press releases

Legacy Tree
$500,000

- Orchard benefits +
- EMA introduction opportunities at industry events
- Segmented research results and first access to market data
- Seat on the EMA Industry Advisory Council
- Premier logo placement and national profile
- Priority meeting hosting

Thank you to our early supporters for helping launch Eat More Apples™ and build momentum for a national initiative.

Grow the demand. Protect the farm. Eat more apples.

$1 Million Launches the Campaign

The research is done. The marketing agency is selected. The first $1 million turns a proven pilot into national consumer marketing. Every commitment counts toward it.

3 in 4

consumers buy fruit for its health benefits

1 in 3

connect apples to specific health benefits

83%

would buy and eat more apples once they know

National survey of 6,000 U.S. consumers. The gap is education, not product.

THE PATH TO LAUNCH

1. **Research complete.** 6,000 consumers surveyed; findings in hand.
2. **Agency selected.** Creative and media partner engaged and ready.
3. **$1 million.** National consumer marketing begins.

Founding Investor designation is available through 2026 only.

TAKE THE NEXT STEP

Learn more
Request a meeting

Give now
Business or personal