USApple

Industry Outlook 2025

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Foreword

Growing up on a farm in western New York in the early 1990s, I had seen firsthand the tough time apple growers were having and I wasn't sure I wanted to continue in my father's and forefathers' footsteps. In 2002 I left the farm, but after nearly ten years I came to the realization that I missed it, I needed it, and I returned.

Farming is more than a profession; it's a way of life. I am immensely proud of our industry and the men and women who continue on day after day, year after year, in this noble pursuit. It has been one of the great honors of my life to serve as Chairman of the U.S. Apple Association just as my father did in 1989. I know that together we will overcome the obstacles we are currently facing just as we did decades ago, and I am hopeful for the future.

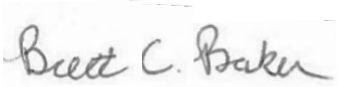
Much has changed since my great-grandfather's time. The industry has developed new and better-tasting varieties for an increasingly demanding consumer. We have invested in our orchards, storage facilities and packing houses by putting in high-density planting systems, controlled atmosphere holding rooms, and sophisticated electronic sorting technologies. These innovations have allowed us to grow more apples on less land, use fewer resources, and ensure that our fruit stays fresher, longer, helping to reduce food waste.

But these improvements have also meant that supply is increasing at a time of stagnant domestic demand, lost export markets, and increased competition from other, now year-round commodities. These dynamics have driven farm gate returns down to historic lows as retailers pit grower against grower, region against region. Often, the prices being paid are less than the cost of storage and packing charges, resulting in net losses to the land. With the cost of labor and other inputs on the rise, growers are being squeezed on both sides. To be sustainable over the long term, the industry must address both the low prices and the high costs.

If things continue as they have for the past several seasons, it won't just be the 27,000-plus apple farms at risk. Beyond the orchard there is a complex supply chain that supports the U.S. apple industry from packaging suppliers to robotics engineers; from tree nurseries to insurance brokers; from cider makers to software developers. Taken together, the industry is responsible for creating more than 150,000 jobs, generating $9 billion in wages and $2 billion in tax revenue. In total, the U.S. apple industry contributes more than $23 billion to the national economy.

The following report is an important resource for those businesses and communities with a vested interest in the U.S. apple industry. By understanding the latest trends in production, utilization and trade, we are better positioned to make informed decisions and effectively allocate our limited resources in a competitive global marketplace. Beyond industry insiders, legislators and regulators must also be aware of our challenges and opportunities to ensure that their policies are in support U.S. apple growers and the security of our nation's food supply.

I love this industry. It means everything to me as I know it does to so many others. Thank you for your contributions to the industry and our association. I am confident that by working together we can make certain that future generations have the same opportunities that I had in choosing farming as a way of life, dedicated to consistently delivering the most delicious and nutritious apples to the nation and the world.



BRETT C. BAKER
Chairman, USApple

Core Findings

Based on the most recent estimate from the U.S. Department of Agriculture (USDA), U.S. apple production for the 2025/26 crop year (CY) will be 11.5 billion pounds or 273 million bushels, a 6% increase from last year. When accounting for states outside of USDA's coverage (the top seven apple-producing states), the total estimate increases to 290 million bushels. These apples will have a farm-gate value of more than $3.4 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 record crop of more than 190 million bushels valued at nearly $2.3 billion. This production level represents a 7% increase from the 2024/25 CY. New York is projected to stay in the number two spot with around 35 million bushels, a 12% increase from last season. Michigan is expected to decrease production by 4% to around 26 million bushels.

[1]Figures 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

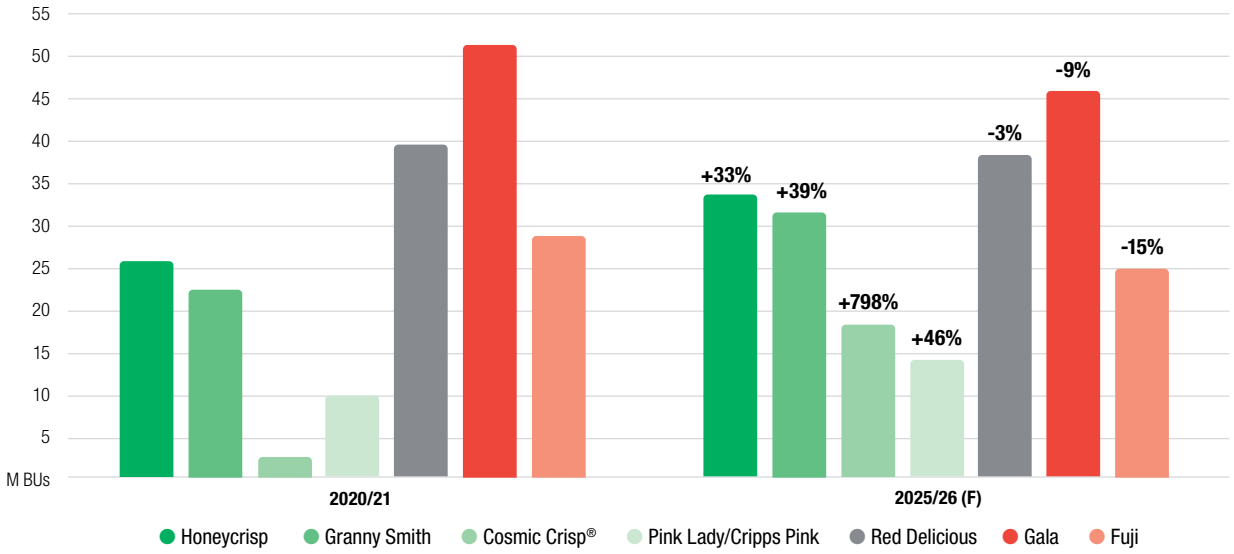
2025/26 (F)	LEVELS	VALUE	YR-OVER-YR % CHANGE
Total Production	**290,127,683**	**$3,423,152,701**	**6%**
Fresh	194,953,422	$3,013,199,378	3%
Processing	86,749,800	$409,953,323	12%
Not Sold	8,424,461	$-	7%
BY STATE			
Washington	190,476,190	$2,291,437,871	7%
New York	34,523,810	$387,552,849	12%
Michigan	26,190,476	$323,445,744	-4%
Pennsylvania	10,238,095	$98,771,466	0%
Virginia	3,928,571	$41,217,620	-28%
Oregon	3,928,571	$44,659,248	38%
California	3,809,524	$46,473,045	2%
Other	17,032,445	$189,594,858	3%

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: 2020-2024.
Year-over-year changes are calculated on levels.

At the varietal level, Gala is expected to retain the top spot with almost 47 million bushels produced, accounting for around 16% of the U.S. apple market. Rounding out the top five are Red Delicious (39 m bu), Honeycrisp (34 m bu), Granny Smith (32 m bu) and Fuji (25 m bu).

Over the last five years, Honeycrisp, Granny Smith, Cosmic Crisp® and Pink Lady/Cripps Pink have been on the rise at the expense of Gala and Fuji. **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 2024/25 season (July to June), the U.S. exported more than 44 million bushels of fresh apples while only importing less than five million bushels. These net exports (40 m bu) are valued at around $900 million (see **Table 2**).

On a year-over-year basis, the balance of trade has decreased with respect to both quantity and value. On the quantity side, imports increased by 5% over 2023/24 levels while exports have fallen by 5%. On the value side, exports are down by around 2% while imports are up by around 1%.

As for global supply, China will continue to dominate the world market, producing and estimated 2 billion bushels in 2025/26. This represents a 5% decrease compared to 2024/25 production levels. Europe is expected to maintain last season's production volume of almost 560 million bushels. South America, already well into their season, was expected to decline by 30% compared to last year's crop, producing around 118 million bushels. Mexico is predicted to have a slight increase in the coming crop year, with production growing to 43 million bushels up 1% from 2024/25. Finally, Canada is expected to increase production by 3% to almost 22 million bushels (see **Table 3**).[2]

Additional data and analyses regarding estimates for 2025/26 U.S. and global apple crop production, utilization and trade are contained in the following report.

Table 2: U.S. Fresh Apple Trade Summary

	2024/25	2023/24	YR-OVER-YR % CHANGE
LEVELS			
U.S. Balance of Trade	**39,626,800**	**42,049,793**	**-6%**
Total Exports	44,167,683	46,363,069	-5%
Total Imports	4,540,882	4,313,276	5%
VALUE			
U.S. Balance of Trade	**$896,035,000**	**$918,213,000**	**-2%**
Total Exports	$1,043,047,000	$1,064,461,000	-2%
Total Imports	$147,012,000	$146,248,000	1%

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

Table 3: Global Apple Production Summary

	2025/26 (F)	2024/25	YR-OVER-YR % CHANGE
United States	**290,127,683**	**274,961,083**	**6%**
China	2,000,850,123	2,106,146,973	-5%
Europe	558,661,206	559,133,625	0%
South America	126,345,722	118,314,607	7%
Mexico	43,042,581	43,042,581	0%
Canada	21,571,913	20,952,694	3%

Sources: USDA, National Agricultural Statistics Service and Foreign Agricultural Service; USApple; United Nations, Food and Agricultural Organization; World Apple and Pear Association; Fruit & Vegetable Growers of 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] 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 2024/25 season continued to be challenging for U.S. apple growers. Following a record crop last year, this season's production levels remained above the five-year average. With domestic demand flat and exports below historical levels, farm gate prices remained low for most varieties. Unfortunately, the costs for inputs like fuel, fertilizer and particularly labor continued to rise, putting pressure on margins and, in many cases, leading to negative returns. Fortunately, the industry has been able to take advantage of many technologies and techniques to increase the efficiency and productivity of their operations. 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 somewhat and the Federal Reserve responded by cutting interest rates to between 4.25% and 4.5%.[3] Since that time, inflation has continued to slow, but the central bank has elected not to reduce rates further as they take a "wait and see" approach.

Their primary concern: *uncertainty*. Following the November 2024 presidential election, the incoming Administration made no secret of the fact that it viewed tariffs as a significant foreign policy lever. Since taking office, the White House has used that lever aggressively and repeatedly.

Proponents of the policy say that, apart from raising revenue, it will reduce trade imbalances by pressuring countries to renegotiate existing agreements and by incentivizing domestic manufacturing. Critics argue that the money raised by tariffs are almost always paid by U.S. businesses and will ultimately be passed along to consumers in the form of higher prices.

While still too early to know the full effects, the tariffs have already started showing up in the data. In terms of economic growth, gross domestic product fell into negative territory in the first quarter (Q1) of 2025 with a 0.5% decline. This contraction was driven by a surge in imported goods as U.S. companies scrambled to stock up before the tariffs took effect – up 52% from the prior quarter. Fortunately, by Q2 2025, the binge buying had stopped and GDP turned positive, up 3% from the prior quarter.[4]

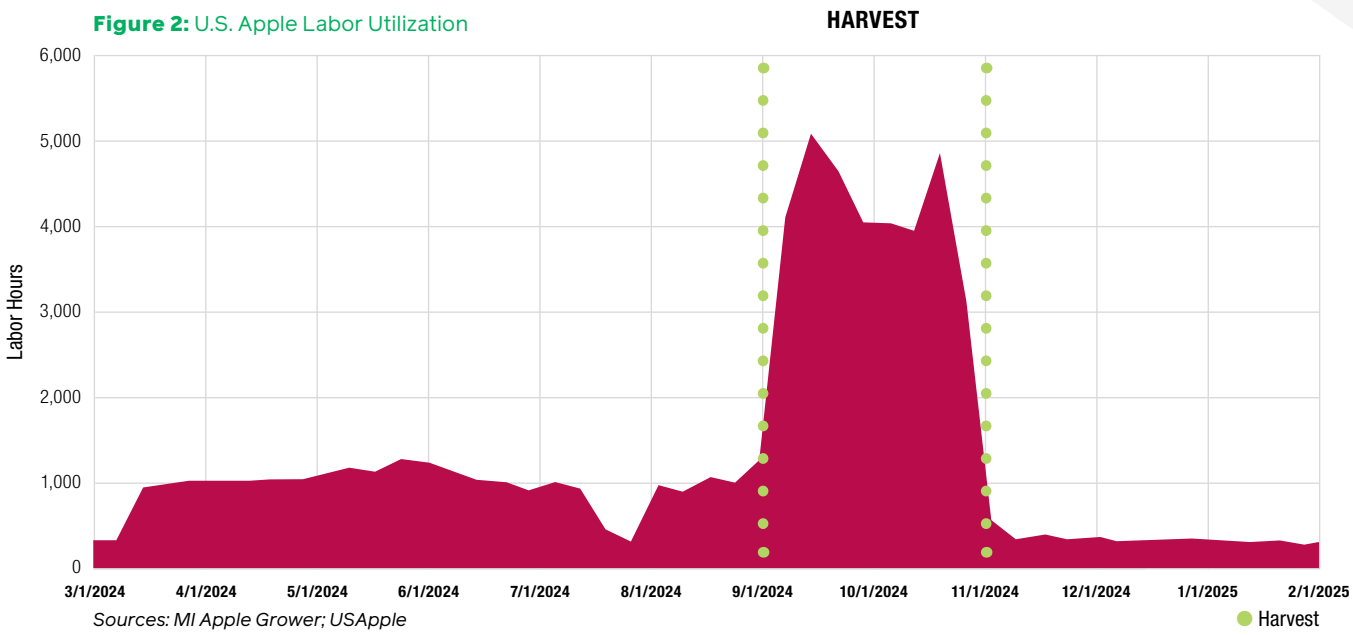
In terms of revenue, customs duties totaled $108 billion through June of 2025 – a 94% increase from the same period a year ago.[5] The extent to which these import taxes are reigniting inflation is unclear. The April 2025, the consumer price index was up only 2.3% year over year – fairly close the Federal Reserve's 2% target rate. However, in May, June and July, those rates ticked up to between 2.4% and 2.7%. As noted above, the central bank will be watching these numbers closely as they adjust interest rates going forward.

As a result of the uncertainty around trade policy, inflation worries, and rising government debt[6] , the dollar is off to its worst start in more than 50 years – down by 10% in the first seven months of 2025.[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).

Fortunately, the labor markets continue to show strength with total non-farm employment growing by an average of 1.1% through July 2025. Additionally, the unemployment rate has remained stable over the last 12 months at around 4.1%.[8]

[3] Federal Reserve Bank of New York. Effective Federal Funds Rate. July 2025.
[4] U.S. Department of Commerce, Bureau of Economic Analysis. Gross Domestic Product, 2nd Quarter 2025 (Advance Estimate) and Annual Update.
[5] U.S. Department of the Treasury: Bureau of the Fiscal Service: Monthly Treasury Statement: June 2025.
[6] The One Big Beautiful Bill Act was signed into law in July 2025 and, according to the Congressional Budget Office, will add approximately $3.4 trillion to the national debt over the next decade.
[7] MarketWatch.com. U.S. Dollar Index (DXY). July 2025.
[8] U.S. Department of Labor, Bureau of Labor Statistics. Current Population Survey & Current Population Survey: July 2024.

Figure 2: U.S. Apple Labor Utilization



Sources: MI Apple Grower; USApple

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 and harder to find. Over the last decade, total crop production employment fell by 3.4% and, in apple orchards specifically, it 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 2024, the median age of crop production employees was 46.4 compared to 42.2 for all employees – a difference of more than 4 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. Based on an analysis of a medium-sized Michigan farm, 56% of the year's labor hours were utilized during the two months of harvest, approximately 20% of the season (see **Figure 2**). Without steady work during the other 80% of the year, it is unlikely that a sufficiently large domestic labor force would be willing or able to stand by and wait for an uncertain annual harvest.

These forces combined mean that the industry is losing domestic workers faster than it can replace them. And so, increasingly, U.S. farms have had to turn to the Temporary Agricultural Worker Program (H-2A visas) to meet their needs. In 2015, there were almost 140,000 certified H-2A positions. That figure ballooned to nearly 385,000 certifications in 2024 – a 175% increase over the decade.[11]

While this program has been important for all crop types, it has been particularly well utilized by apple growers. In 2024, the average number of H-2A workers per contract was 17 – for apple orchards, that figure was nearly twice as large with 33 certified workers per application.

[9] U.S. Department of Labor, Bureau of Labor Statistics. Quarterly Census of Employment and Wages: 2015-2025.
[10] U.S. Department of Labor, Bureau of Labor Statistics. Current Population Survey: Table 18b: 2011-2024.
[11] U.S. Department of Labor, Employment and Training Administration. Office of Foreign Labor Certification: 2015-2025.

This is a critical issue for the U.S. apple industry because this source of labor is expensive and getting more so. Over the last five years, the U.S. average Adverse Effect Wage Rate (AEWR) – the minimum compensation rate for H-2A labor – has increased by 30% to $17.74 per hour. For the top seven apple-producing states, that average is even higher at $18.67 per hour. In 2025, three of the top four AEWRs in the U.S. were in apple-producing states: California at $19.97 per hour and Oregon and Washington at $19.82 per hour.[12]

Beyond wages, H-2A employers must pay for transportation, housing and other various application and visa fees that significantly increase the total cost of the program. A series of Washington State University (WSU) reports estimated fixed costs associated with the H-2A program to be around $4.50 per hour, bringing the total hourly manual labor rate to $23.75 (2024 WA AEWR).[13]

Given these additional costs, it stands to reason that apple growers would prefer to hire domestic workers whenever possible. However, as noted above, for whatever reason, fewer and 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.

Unfortunately, there are still no commercially viable technologies to harvest apples by machine and so, each year billions of pounds of U.S. apples are picked by hand. Labor now accounts for around 60% of production costs and, thanks to the industry's reliance on the H-2A program, that share is rising. *For the sake of the U.S. apple industry and the security of our nation's food supply, it is critical that policy makers work to immediately fix this program to minimize administrative burdens and limit the endlessly compounding increases to the AEWR.*

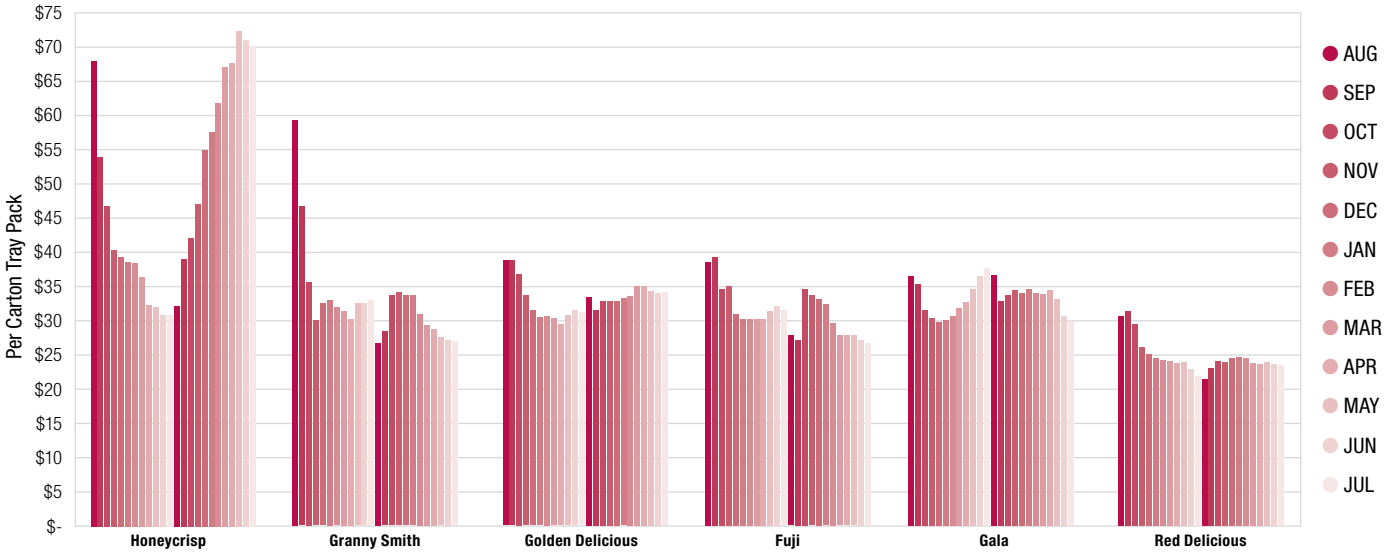
While all these costs have been on the rise, the price of apples has been in decline. During the 2023/24 season, the consumer price index (CPI) – a metric tracking the retail price – fell by 14.5% (July to July). During the same period, the price for All Food was up by 2%; All Items, up 3%. Since last July, the CPI for apples has increased by 6%, but is still below where it was before the crash.[14]

It is important to note, however, that retail prices are not equivalent to the prices growers receive. During the 2023/24 season, grower prices for carton tray packs (40-pound boxes) were falling by far more than consumer prices. Fujis were down by 18%; Red Delicious ended up 29% below where they started the year; Granny Smith were off by 45%; and Honeycrisp had fallen from $67.85 to $30.55 per box – a decline of 55%.

According to the WSU budget studies referenced above, many of these prices are 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 $43.48 per box to just cover variable costs. To cover total cash costs including property taxes and insurance costs needed to maintain operations in the short term, that box of Honeycrisps would have had to sell for $44.89 – 32% above July 2024 grower prices.[15] 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.

[12] U.S. Department of Labor, Employment and Training Administration. Adverse Effect Wage Rates: 2020-2025.
[13] Washington State University, School of Economic Sciences. Washington Enterprise Budgets for Crop Commodities: Cosmic Crisp, Gala, Granny Smith and Honeycrisp: 2024.
[14] U.S. Department of Labor, Bureau of Labor Statistics. Consumer Price Index: July 2023-July 2025.
[15] Washington State University, School of Economic Sciences. Ibid.

Figure 3: U.S. Farm-Gate Prices, by Select Varieties: 2023/24 & 2024/25



Sources: USDA, Agricultural Marketing Service; USApple
Note: Prices represent national averages for carton tray packs, all item sizes, all grades.

Fortunately, prices for some varieties in the 2024/25 season rebounded providing a bit of relief. After staying below that total cash cost break-even point through October, the grower prices of Honeycrisp increased throughout the season ending at $70.00 by July 2025. Unfortunately, other varieties like Fuji, Gala and Cosmic Crisp® continued to fall from already depressed levels. Grower prices for Granny Smiths ended the season down 18% at $27.02 per box – 10% below the WSU break-even point that covers operating expenses in the short term (see **Figure 3**).[16]

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. At that point, 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 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.

With expenses rising and revenues falling, the U.S. apple industry has had no choice but to get more efficient. In 2007, there were 289,000 apple-bearing acres in the top seven apple

[16] USDA, Agricultural Marketing Service. My Market News, Shipping Point: August 2023-July 2025.

producing states. By 2024, that number had grown to 300,000 acres – a 4% increase. During the same period, production increased from 201 million bushels to 258 million bushels – a 29% increase. Because production is growing faster than the acreage, the yield per acre has also increased, rising 24% to 863 bushels per acre since 2007.

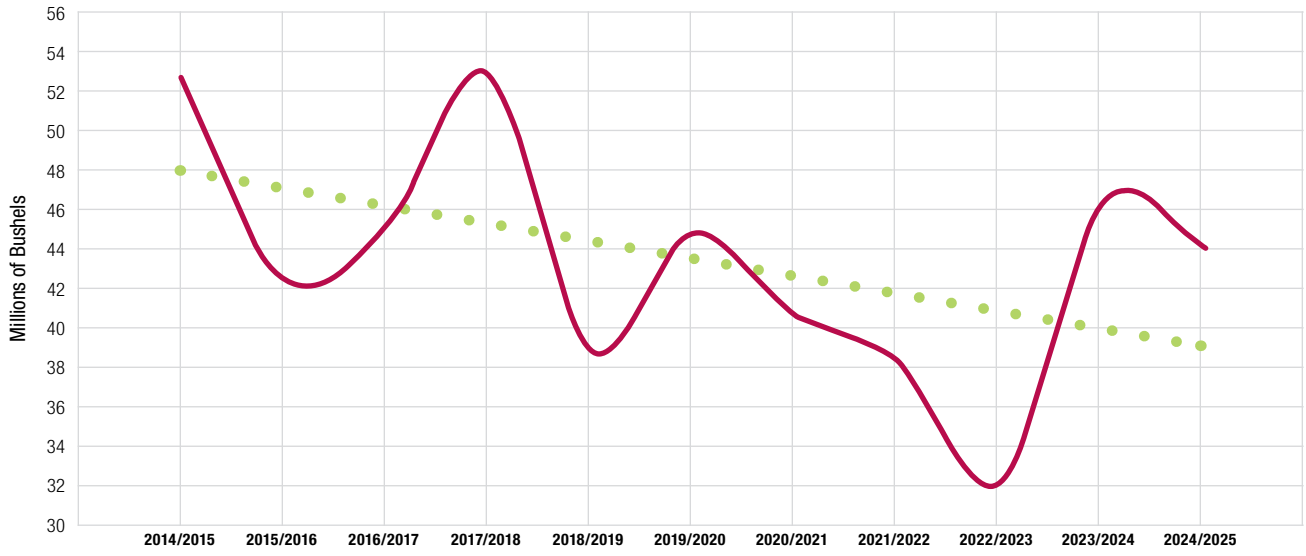
Up to this point, the discussion of U.S. apple market conditions has been primarily concerned with factors impacting the supply of apples, but there are a number of demand-side factors that also deserve consideration.

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 crumble. From highs enjoyed during the 2014/15 season, fresh apple exports have fallen by 16% over the decade (see **Figure 4**).[17]

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 $658 million in lost sales.

In June 2023, India announced that they would be removing the retaliatory tariffs on U.S. apples. In just two seasons, that market has bounced back to become the sixth largest fresh apple export market valued at more than $36 million through June 2025. However, while that is encouraging news, it is a far cry from the $157 million in annual exports they were buying before low-cost providers like Iran and Türkiye got their foot in the door.

Figure 4: U.S. Annual Fresh Apple Exports



Sources: USDA, Foreign Agricultural Service; USApple

[17] USDA, Foreign Agricultural Service. Global Agricultural Trade System: Apple Exports: August 2014-June 2025.

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 around half of total fresh apple exports, worth nearly half a billion dollars 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 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 educate consumers and raise awareness of both classic and exciting new varieties, as well as the powerful nutritional benefits of apples. 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.[18]

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.

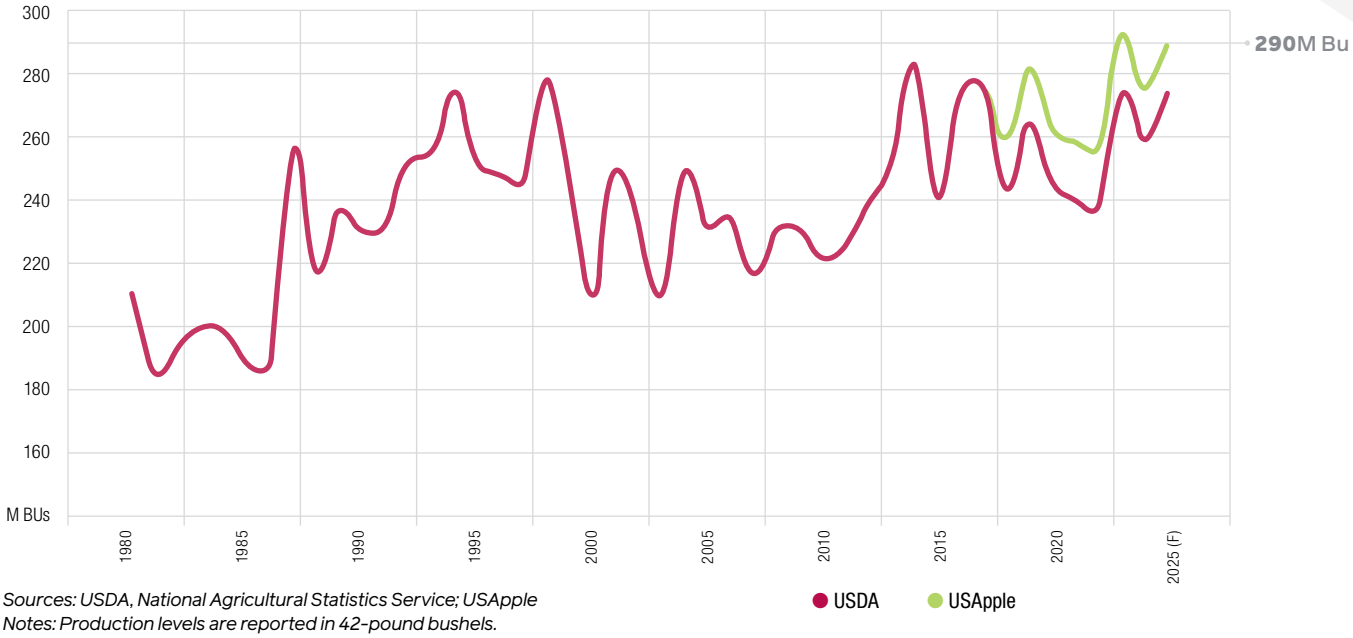
[18] Eat More Apples™. Website: https://eatmoreapples.org

U.S. Apple Production

According to a USApple analysis of USDA data, total U.S. apple production for the 2025/26 CY will be around 12.2 billion pounds or 290 million bushels. This represents a 6% increase compared to last year's production figure and is 8% greater than the five-year production average (see **Figure 5**).

290
MILLION BUSHELS PRODUCED

Figure 5: U.S. Apple Production: 1980-2025 (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.

For this year's production to exceed the five-year average is remarkable given that it includes the (unofficial) record 2023/24 season. According to USDA, however, that honor belongs to the 2014/15 season with 282 million bushels. 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 stopped tracking them in 2018. With no additional datapoints on which to base assumptions regarding volume increases or decreases 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.[20] 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 reported datapoint in 2017.

Using known historical production per acre ratios, USApple estimates that, on top of the 273 million bushels grown in the primary apple states, an additional 19 million bushels were produced in the rest of the country. This brings the estimated 2023/24 CY total to almost 292 million bushels and would make it the highest producing season in U.S. apple history.

[19] 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 2018-2025 and added it back to USDA's national production figures to arrive at a new, more comprehensive USApple production estimate.

[20] The Census of Agriculture provides a wide range of data beyond acreage including income and expense statistics by various farm types. Much of the data is available down to the county level.

Beyond coverage levels, the annual survey and Census also differ on the definition of acreage. While the Census covers all bearing and non-bearing acreage, the annual survey represents only "commercial acreage" defined as "orchards of 100 or more bearing trees" in the top seven apple producing states.

Over the last decade, Washington has added 13,000 net new "commercial" bearing acres and is yielding over 1,000 bushels to the acre. New York and Michigan have also been adding acres in the last ten years with Michigan being slightly more efficient at around 740 bushels per acre. The other major apple-producing states have all been taking out acreage since 2015 with California dropping 27% (see **Table 4**). It should be noted that no state added apple acreage between 2023 and 2024.

While data regarding acreage is useful and indeed critical in the absence of production data, it is no substitute. The characteristics of acreage will differ significantly from 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. Without corresponding production data to go along with these acreage reports, it is very difficult to know how yields and utilizations are evolving in these increasingly important "other" states.

Among the top apple producing states in the 2025/26 CY, Washington is expected to produce around 190 million bushels [21], followed by New York (35 m bu) and Michigan (26 m bu). As detailed above, the significance of the states no longer tracked by USDA is growing and that group is expected to produce around 17 million bushels, well ahead of Pennsylvania's estimated 10 million bushels. Rounding out the top eight states (including "other") are Virginia (4 m bu), Oregon (4 m bu) and California (4 m bu) (see **Table 5**).[22]

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

	2024 ACRES	2015-2024 CHANGE	2024 YIELD
United States	**299,500**	**(32,680)**	**863**
Washington	174,000	13,000	1,024
New York	46,000	3,700	668
Michigan	37,000	4,000	737
Pennsylvania	18,500	(1,500)	555
California	9,800	(3,700)	381
Virginia	9,600	(600)	570
Oregon	4,600	(400)	621

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."

[21] WSTFA also releases an annual estimate for apple production in Washington. Those estimates are based solely on fresh apples so they are not equivalent to the USDA figure, but an adjustment can be made based on historical utilization shares to allow for a reasonable comparison. Using the state's five-year average fresh apple utilization rate of 75.6%, the USDA's figure can be revised down to 144 million bushels. The 2025/26 WSTFA fresh apple forecast is 136 million bushels – a difference of almost 8 million bushels or 6%.

[22] USDA, National Agricultural Statistics Service. Crop Production. Released August 12, 2025.

With respect to year-over-year changes, Washington's production is expected to grow by 7%, increasing by more than 12 million bushels. Growers attribute this to favorable conditions throughout the growing season. Also, given that Honeycrisps have a bit more of a biennial bearing, it was thought that production would be up with last season's short crop. According to growers, a cold and wet spring in New York presented some challenges for thinning.

190M
BUSHELS

UP 7% YOY

35M
BUSHELS

UP 12% YOY

26M
BUSHELS

DOWN 4% YOY

While sizing may be down, volume appears strong with the state's crop projected to be up 12% compared to last year – an increase of almost 4 million bushels. In Michigan, growers noted a few hail and frost events, but didn't expect that to significantly impact the crop. Production there is anticipated to be down by 4%, or around one million bushels. Despite an April freeze event, Pennsylvania growers expect production to be flat from last season, holding steady at around 10 million bushels. In Virginia, the April freeze hit growers considerably harder than they did further north. Production in that state is predicted to be down 28% from last season, a decrease of 1.5 million bushels. Oregon is expected to have a significant season, up by close to 40% or 1 million bushels from last year. California and the "other" states are both projected to be up slightly year over year adding around half a million bushels combined.

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

	2025/26 (F)	2024/25	5-YR. AVERAGE
LEVELS			
United States	**290,127,683**	**274,961,083**	**268,753,004**
Washington	190,476,190	178,095,238	166,833,333
New York	34,523,810	30,714,286	32,595,238
Michigan	26,190,476	27,261,905	26,542,857
Pennsylvania	10,238,095	10,261,905	11,609,524
Virginia	3,928,571	5,476,190	4,919,048
Oregon	3,928,571	2,857,143	3,504,762
California	3,809,524	3,738,095	4,809,524
Other	17,032,445	16,556,321	17,938,719
PERCENT CHANGE (VS. 2025/26)			
United States		**6%**	**8%**
Washington		7%	14%
New York		12%	6%
Michigan		-4%	-1%
Pennsylvania		0%	-12%
Virginia		-28%	-20%
Oregon		38%	12%
California		2%	-21%
Other		3%	-5%
MARKET SHARE			
United States	**100%**	**100%**	**100%**
Washington	66%	65%	62%
New York	12%	11%	12%
Michigan	9%	10%	10%
Pennsylvania	4%	4%	4%
Virginia	1%	2%	2%
Oregon	1%	1%	1%
California	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 2025/26 (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).

In terms of varietal mix, in 2025/26, Galas are expected to hold on to the top spot at around 16% of total U.S. apple production followed by Red Delicious (13%) and Honeycrisp (12%). **Table 6** details the expected 2025/26 production by variety and highlights the shifts in composition as compared to the 2024/25 CY and the five-year average.[23]

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

	2024/25 (F)		2023/24		5-YR. AVERAGE	
Total Varieties	**290,127,683**		**274,961,083**		**268,753,004**	
Gala	46,530,924	16%	46,101,874	17%	48,139,678	18%
Red Delicious	38,691,618	13%	41,411,815	15%	38,240,374	14%
Honeycrisp	33,982,794	12%	23,419,064	9%	26,157,495	10%
Granny Smith	31,541,497	11%	27,075,368	10%	25,034,593	9%
Others	25,275,483	9%	21,637,404	8%	22,893,954	9%
Fuji	24,931,480	9%	24,844,320	9%	26,430,112	10%
Cosmic Crisp®	18,338,186	6%	16,778,808	6%	8,508,596	3%
Golden Delicious	15,265,122	5%	15,006,877	5%	17,603,619	7%
Pink Lady/Cripps Pink	14,593,737	5%	16,996,036	6%	12,898,695	5%
Rome	7,382,326	3%	7,242,542	3%	8,684,629	3%
Envy®	6,826,624	2%	7,223,470	3%	4,607,344	2%
McIntosh	5,918,397	2%	5,483,655	2%	5,846,326	2%
Idared	5,330,313	2%	5,131,823	2%	6,019,387	2%
Empire	4,256,481	1%	3,968,783	1%	4,276,227	2%
York	3,707,493	1%	3,971,765	1%	4,783,117	2%
Ambrosia	2,676,385	1%	4,089,442	1%	3,356,581	1%
Cortland	1,719,802	1%	1,567,434	1%	1,727,077	1%
Mutsu/Crispin	1,092,486	0%	984,394	0%	1,139,920	0%
Spartan	620,753	0%	565,487	0%	514,620	0%
Jonathan	592,301	0%	599,971	0%	705,377	0%
Newtown Pippin	432,090	0%	428,602	0%	622,509	0%
Stayman	309,990	0%	325,117	0%	330,599	0%
Rome Sport	111,401	0%	107,032	0%	232,176	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 2025/26 (F) data.

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

Table 7 details 2025/26 estimated production by variety, by state.[24]

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

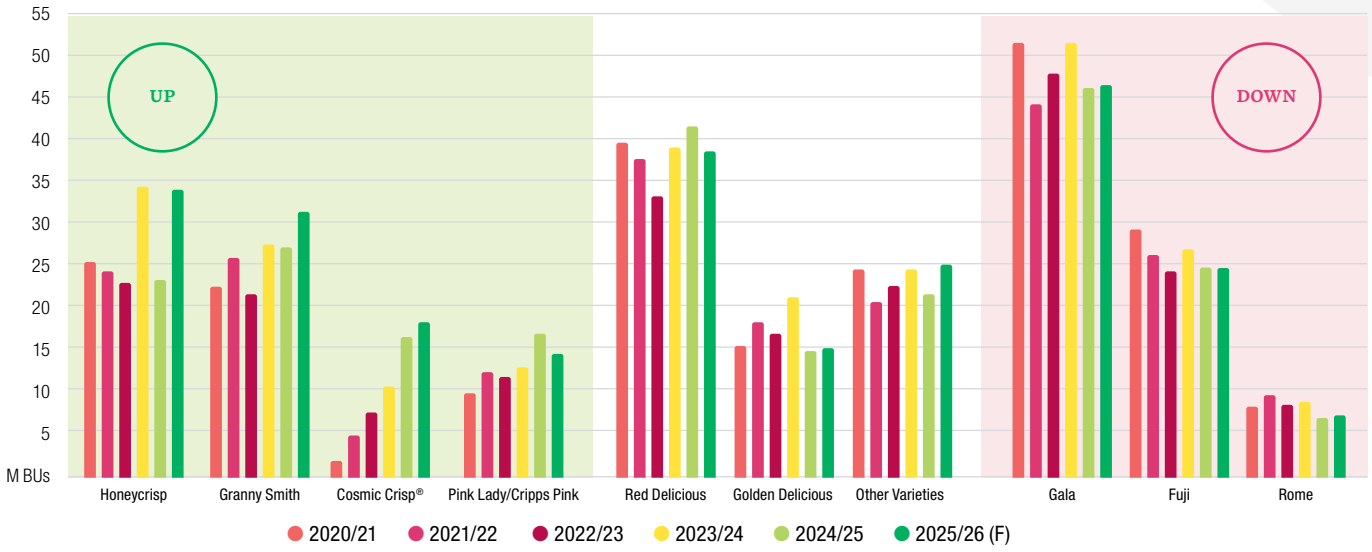
2025/26 (F)	U.S.	CA	MI	NY	OR	PA	VA	WA	OTHER
Total Varieties	**290,127,683**	**3,809,524**	**26,190,476**	**34,523,810**	**3,928,571**	**10,238,095**	**3,928,571**	**190,476,190**	**17,032,445**
Gala	46,530,924	1,735,374	4,986,214	3,328,567	799,017	750,336	63,306	33,731,553	1,136,558
Red Delicious	38,691,618	-	2,855,507	2,270,312	918,358	787,768	513,569	22,487,702	8,858,402
Honeycrisp	33,982,794	-	2,318,333	1,913,297	244,019	174,655	3,542	28,912,760	416,188
Granny Smith	31,541,497	777,265	-	501,419	603,155	376,237	70,131	28,645,049	568,240
Others	25,275,483	43,918	4,960,512	5,097,768	-	633,136	518,218	13,653,248	368,683
Fuji	24,931,480	274,499	2,950,605	1,758,744	865,700	1,128,819	97,737	17,401,198	454,178
Cosmic Crisp®	18,338,186	-	-	-	-	-	-	18,338,186	-
Golden Delicious	15,265,122	412,440	2,200,103	1,866,956	5,867	2,056,571	878,601	6,291,202	1,553,382
Pink Lady/Cripps Pink	14,593,737	213,062	190,196	473,473	440,938	265,360	245,850	12,180,839	584,018
Rome	7,382,326	-	1,192,579	3,169,174	-	977,484	511,907	-	1,531,182
Envy®	6,826,624	-	-	-	-	-	-	6,826,624	-
McIntosh	5,918,397	-	1,123,183	4,244,048	-	10,396	6,424	-	534,346
Idared	5,330,313	-	1,953,362	3,130,918	-	48,075	171,851	-	26,106
Empire	4,256,481	39,641	1,010,094	2,956,205	-	25,300	9,865	-	215,376
York	3,707,493	-	-	205,854	-	2,699,655	718,493	-	83,491
Ambrosia	2,676,385	-	-	510,393	51,518	85,081	-	2,007,831	21,564
Cortland	1,719,802	-	-	1,442,890	-	8,210	33,990	-	234,713
Mutsu/Crispin	1,092,486	-	-	1,011,656	-	52,058	10,007	-	18,765
Spartan	620,753	-	-	500,229	-	38,873	5,035	-	76,615
Jonathan	592,301	-	449,787	90,589	-	20,248	245	-	31,432
Newtown Pippin	432,090	313,324	-	-	-	3,323	13,288	-	102,156
Stayman	309,990	-	-	24,638	-	65,374	56,513	-	163,465
Rome Sport	111,401	-	-	26,681	-	31,136	-	-	53,585

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. Red Delicious, Golden Delicious and "other" varieties are generally flat since the 2020/21 CY. Varieties on the decline include Gala, Fuji and Rome. **Figure 6** charts the yearly production growth or decline for select top varieties.

[24] For Michigan, New York, Oregon, Pennsylvania, Virginia and Other States, the 2025/26 production values by variety were derived using USApple's state-specific December 1, 2024 storage ratios – the percentage of total storage by variety at that point in time. CAC provided estimates for the fresh varieties in California, while December 1, 2024 storage ratios in the state were used to estimate processing varieties. Washington's estimated varietal shares were 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

Supply levels are, of course, a key determinant of grower prices. With a large crop of Honeycrisps on the way, the remainder of this section will focus on that variety to illustrate how supply and prices are linked – and how those forces impact retail prices and margins.

In the 2023/24 season when the production of Honeycrisps surged 47%, farm-gate prices plummeted by 55% over the course of the season. When Honeycrisp supplies were in short supply in the following 2024/25 CY, grower prices recovered, increasing by 129% over the season.

Figure 7 shows the negative correlation between early-season, November Honeycrisp storage volumes and late-season, June grower prices. As November storages increase, prices, by the end of the season, are down; and vice versa. If November supplies are too high, the June prices dip near or below $45 per box, the approximate break-even point for Honeycrisp.

Figure 7: U.S. Honeycrisp Holdings vs. Grower Prices

Sources: USDA, Agricultural Marketing Service; USApple
Notes: Holdings data represent early-season November storage levels.
Prices represent June shipping-point prices for carton tray packs, all sizes, all grades.

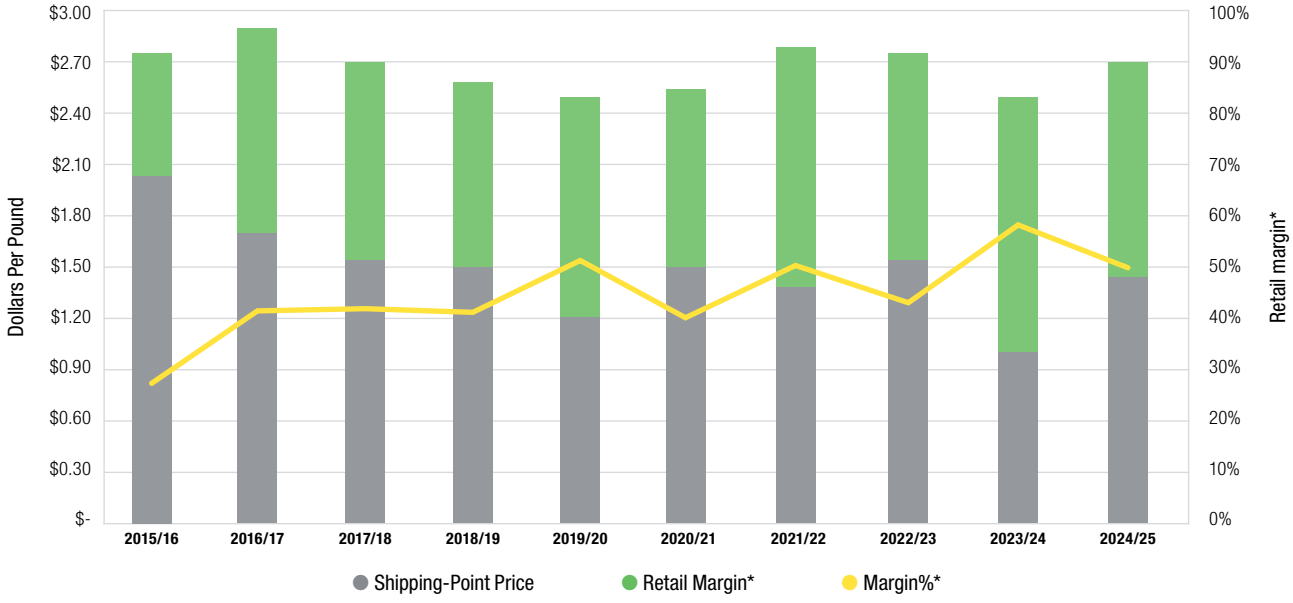
However, there is a significant disconnect between the prices growers receive and those charged at retail. In the 2024/25 season, on average, across all varieties, growers received $0.82 per pound. The average retail price was $1.80 – a difference of almost $1.00 per pound. That's an average retail margin of 55%.[25]

For Honeycrisps, the pricing story has been evolving over the past decade. **Figure 8** shows the 10-year trend in Honeycrisp grower prices stacked with retail margins (which sum to the total retail price) – as well as the margin as a percentage. In 2015/16, when Honeycrisp production was below 20 million bushels, shipping-point prices were higher about $2 a pound while retail prices were $2.73 per pound – a 26% retail margin. As Honeycrisp production grew to almost 34 million bushels in the 2023/24 season, grower prices fell to $1.01 per pound, providing retailers with an astounding 60% profit margin.

What's more, that year, retailers made that margin on discounted retail prices – $2.51 per pound, nearly the lowest average price of the decade. As the Honeycrisp data show, retailers like to be consistent pricing, moving up and down by an average of around 6% over the decade. Grower prices, on the other hand, fluctuate by an average of 16% and are highly dependent on relative levels of Honeycrisp supply. In years with a significant crop, retailers have been driving down grower prices, in some cases, below the cost of production. In shorter years like the 2024/25 season, retailers pay growers a better price and take a lower margin (only 48%).[26]

When Honeycrisps were long in 2023/24, the number of retail promotions spiked to almost 22,000, an increase of 47% from the previous year. Unfortunately, without corresponding movement data by variety it is difficult to know the extent to which those discounts drove volume. USDA data for all varieties

Figure 8: U.S. Honeycrisp Retail Margin*



Sources: USDA, Agricultural Marketing Service; USApple
*Notes: *Margin data represent the difference between the retail price and the shipping-point price. The retail margin figures do not account for other costs of goods sold.*

[25] For the purposes of this report, the retail margin is simply defined as the difference between retail price and the shipping-point, or grower price. Those margin figures do not account for any other costs of goods sold like transportation, marketing or rent.
[26] USDA, Agricultural Marketing Service. My Market News, Shipping Point: September 2015-July 2025; and Retail: August 2015-July 2025.

show movement up 20% from the previous year, equivalent to around 26 million bushels. Certainly, many of those would have been Honeycrisps. What is also unknown are the additional expenses retailers incur by moving more volume. If a retailer's increased sales are mostly offset by additional expenses, they may opt for lower volumes and higher prices/margins.

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.

CORE INSIGHTS

Like any other industry, the business of growing apples has cycles. These periodic ups and downs are brought on by a range of factors like advancements in technologies that boost output and/or lower costs; new competitors that sap demand; or mergers and investments that fundamentally change the landscape and scale of operations. The current downcycle can be traced to all of those.

In the early 2010s, the prices for Galas and Red Delicious were rising. Starting in 2012, U.S. apple acreage began to increase. In 2016 and 2017, prices for Fuji and Honeycrisps were peaking, exports were strong, and acreage continued to grow. In 2018 and 2019, with the help of low interest rates, private equity entered the industry in a big way, partnering with a number of large Washington operations. Sizable investments were made to modernize storage facilities, packing lines, orchards and operations. Those investments literally bore fruit as density and yields improved, packouts rose, and the scales were achieved needed to guarantee year-round supplies for demanding retail customers. While the supply of apples was growing, exports were falling, putting significant pressure on prices domestically. In 2020, acreage growth plateaued, but densification continued. With a record crop in 2023/24, for many, the supply and demand pressures pushed prices below the cost of production, leading to negative returns. The less well-capitalized operations may be able to deal with this for a year or two, but after that, cash is low, banks are hesitant, and equity partners may be scarce. It is likely that, as the industry completes this cycle over the next several years, there will be a correction in production, either through acreage removal, slower acreage renewal, selective harvesting, or higher quality standards. It is also likely that there will be a consolidation of the industry as some growers exit while others merge, chasing economies of scale and retailer bargaining power.

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.[27]

[27] USDA, National Agricultural Statistics Service. Production, Utilization, Bearing Acres: 2020-2025.

In the 2024/25 season, 69% of all U.S. apples went to the fresh market – the second consecutive year of above average fresh utilization. This seems to support the notion that processing orchards are starting to come out faster than they are going in, if they are going in at all. The expenses for putting in an orchard – then harvesting that orchard – are making it difficult to justify an investment in strictly processing apples.

At the state level, the ratios of fresh to processing apples can vary dramatically. In Oregon, for example, 88% of the 2024/25 crop went to the fresh market. In contrast, only 31% of California's apples were utilized as fresh. In Washington, the sheer magnitude of their crop makes big swings in the utilization ratios less likely. For the last decade, Washington has consistently produced 76% fresh and 20% processing with the remainder being left unsold.

Other states are clearly making moves towards the fresh market. In New York, the utilization ratio went from 49% fresh, 50% processing in the 2022/23 season, to 56% fresh, 43% processing by 2024/25. Over that same period, Virginia grew their fresh utilization from 47% to 56% with processing declining from 52% to 44%. And, in California, despite declining acreage and a focus on processing apples, the share of fresh apples is also growing with utilization ratios moving from 20%/79% to 31%/69% fresh to processing in the same two-year span.

In terms of market share, Washinton continues to lead the U.S. in production for both fresh and processing apples. In the 2025/26 CY, it is expected that the state will be responsible for 74% 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 Ambrosia, Fuji and Gala, for example, are primarily utilized as fresh while other varieties like Idared, Rome and York are primarily utilized for processing.[28]

As the scales move further towards the fresh market, one would expect some economic signals from the domestic processors reliant on a dwindling supply. The market certainly moved in response to the potential trade wars and the uncertainty around those negotiations.

CORE INSIGHTS

Given the pricing challenges many faced during the 2023/24 season, it begs the question: how and why did the U.S. apple industry grow so many fresh apples? While there is no one answer, there are several driving forces that, when combined, make these production volumes inevitable.

First, the industry is adding new acreage as shown in **Table 4**. Between 2015-2024, the U.S. added close to 33,000 net new apple acres. With processing prices so far below fresh prices, it is unlikely that much if any of that acreage was devoted to processing varieties. Second, the industry is replacing an untold number of older, less productive acres with newer, higher-density orchards. Both the new and the replaced acreage will be at least as efficient, but likely more efficient and higher yielding than the farm average. Here again, when selecting a variety to replant, a grower will take out one fresh variety for another or they will take out a processing variety for a fresh one – it is highly unlikely that they will remove a fresh variety to plant processing block. Third, packouts are improving dramatically. The quality of the apples at harvest and the improvements in storage protocols mean that a higher percentage of apples stay fresher, longer and fewer late-season apples get culled for processing. The combination of these factors mean that, in the absence of a localized heat, hail or frost event, the supply of fresh apples in any given year is at least as large, if not larger than a comparable year.

[28] The data in **Table 9** were derived using USApple's December 1, 2020-2024 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.*

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

2025/26 (F)	UTILIZATION	% OF STATE PRODUCTION	% OF NATIONAL USE TYPE
FRESH			
United States	**194,531,155**	**67%**	
Washington	144,000,275	76%	74%
New York	18,173,575	53%	9%
Michigan	13,079,739	50%	7%
Pennsylvania	4,562,417	45%	2%
Oregon	3,392,098	86%	2%
Virginia	1,835,677	47%	1%
California	882,859	23%	0%
Other	8,604,515	51%	4%
PROCESSING			
United States	**86,853,499**	**30%**	
Washington	38,476,190	20%	44%
New York	16,129,924	47%	19%
Michigan	12,937,951	49%	15%
Pennsylvania	5,627,164	55%	6%
California	2,898,916	76%	3%
Virginia	2,066,692	53%	2%
Oregon	516,553	13%	1%
Other	8,200,109	48%	9%

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: 2020-2024.
The sum of fresh, processing and not sold apples equals total production.

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

2020-2024 AVERAGE	FRESH	PROCESSING
Total Varieties	**71%**	**29%**
Ambrosia	83%	17%
Cortland	38%	62%
Cosmic Crisp®	80%	20%
Empire	67%	33%
Envy®	84%	16%
Fuji	80%	20%
Gala	82%	18%
Golden Delicious	51%	49%
Granny Smith	77%	23%
Honeycrisp	60%	40%
Idared	6%	94%
Jonathan	34%	66%
McIntosh	58%	42%
Mutsu/Crispin	12%	88%
Newtown Pippin	37%	63%
Pink Lady/Cripps Pink	81%	19%
Red Delicious	82%	18%
Rome	6%	94%
Rome Sport	48%	52%
Spartan	90%	10%
Stayman	19%	81%
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
Note: U.S. Presidential elections were held on November 5, 2024.

Following the November 2024 election, AJC imports from China surged as U.S. buyers worked to get ahead of the tariffs they expected when the new Administration took office. By early-May, AJC prices had increased around the globe: Türkiye up 11%; China up 17%; EU up 20%; U.S. up 33%. The price of Washington juice apples had also shot up to around $135 per ton – a 172% increase from the week of the election. As a comparison, Washington peeler apples, which do not have as much competition from imports, rose only 4% during that period (see **Figure 9**).

While it would be preferable for all U.S. juice makers to use only domestic sources, as noted above, it is simply not possible given the quantities required and current capacity levels. And for Washington, it is not profitable, even at these enhanced prices. Given that the state does not intentionally grow for the processing market, Washington apples being sold for juice or peelers are just those that didn't qualify as fresh. The input costs were the same as fresh apples, but the return was only $0.07 per pound, at best.

With the cost of developing additional domestic AJC manufacturing capacity and the uncertainty of the return on that investment, it seems unlikely that there will be significant moves in that direction any time soon. For now, domestic growers of processing apples will enjoy higher prices, until their supplies are exhausted. At that point, buyers of AJC and other processed apple products will have look to the international markets.

In order to avoid any supply chain disruptions, U.S. importers will need to diversify their sourcing to ensure affordable access to those raw materials regardless of tariff levels or other geo-political situations. The following section examines U.S. apple imports and exports, detailing how they have changed over time and what that means for the balance of trade.

U.S. Apple Trade

According to USDA trade data, fresh apple exports totaled 44.2 million bushels in the 2024/25 CY (July to June). This is around 2.2 million bushels lower than 2023/24 export levels – a 5% year-over-year decline. During the same period, fresh apple imports grew by a quarter of a million bushels, a 5% increase. Unfortunately, the joint effects of decreasing exports and increasing imports caused the net positive fresh apple trade balance to decrease by around 2.5 million bushels.[29]

44+

MILLION BUSHELS EXPORTED

[29] USDA, Foreign Agricultural Service. Global Agricultural Trade System: Apple Exports & Imports: January 2023-June 2025.

While this is only a small fraction of total fresh apple exports, it is still important. Every apple that goes abroad, is one less apple here at home to compete against. Robust export markets help all U.S. growers, exporters or not, by helping to regulate domestic supply levels. If we lose access to that relief valve and international markets stop accepting U.S. apples, the impact could be catastrophic.

It has been a wild ride since the new Administration began rolling out its tariff plans. The markets, across all U.S. sectors, have been scrambling to figure out how to navigate in uncertain waters. Planning and maintaining global supply chains is challenging, doing so in an unstable environment is that much more so.

In early-February 2025, the tariff threats became very real for the U.S. apple industry as tensions rose with Canada and Mexico – the two largest fresh apple export markets. In response, both of those countries would likely have responded by placing retaliatory tariffs on U.S. fresh apple imports – fortunately, calmer heads prevailed and an escalation was averted.

Then came the temporary blow up with China that sent tariff rates as high as 145%. In 2024, China was responsible for providing the U.S. with 31% of its AJC needs valued at $151 million. At that volume and tariff rate, the hypothetical bill for U.S. importers would be close to $220 million. Clearly, this would cause some movement in the international markets as U.S. buyers go out looking to source 134 million gallons of AJC. Hopefully U.S. importers would have planned for this contingency with enough supplies on hand to allow time for adjustments. But shifting supply chains is expensive and time consuming, perhaps a better course of action is to take a “wait and see” approach. Tensions did ease with China and tariffs currently stand at a 30% – at rate at which Chinese AJC imports are still less expensive than domestic juice.

While the trade situation is still very much in flux and presenting a number of challenges, there are significant opportunities as well. The unpredictable and aggressive nature of the tariffs have been successful in bringing trading partners to the table. Three of the top five U.S. fresh apple export markets, Taiwan, Viet Nam, and India, have indicated a willingness to negotiate, with one promising to take their apple tariff to 0%. This has the potential to supercharge these already important markets.

Other countries at the negotiating table include 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.

Table 10 highlights a portion of what’s at stake in a global trade war by detailing fresh apple trade levels and values for top export and import partners.

It should be noted that, just because U.S. growers are shipping fruit abroad, it doesn’t necessarily mean that they are making a profit. In many cases, exporters may sell at a loss in the hopes of opening markets to larger, more profitable shipments in the future. Or they may be selling at below market prices to keep foreign buyers happy at a time when the U.S. has plenty of fresh apples going around.

In the case of India, while it is wonderful news that the retaliatory tariffs were dropped and fresh apple exports are up around 3,000%, the value of those exports is around $18.53 a bushel. Without knowing the varieties, grades and sizes they were buying, it is difficult to know if that price is below the cost of production and delivery, but if it is, the margins are likely razor thin.

Beyond India, other bright spots for fresh apple exports include the Dominican Republic and Guatemala up 13% and 10% respectively with average pricing. Of some concern is that four of the top five export markets are down between 6% and 10% year over year with the exception to Viet Nam which is flat.

Figure 10 highlights the primary export and import markets for U.S. apples in the 2024/25 crop year.

On a monthly basis, 2024/25 fresh apple exports started the season strong and posted an excellent November – the best single month since November 2017 when the Indian market was coming on strong. On the import side, the counter-seasonal cadence was similar to the trend, but a bit muted (see **Figure 11**).

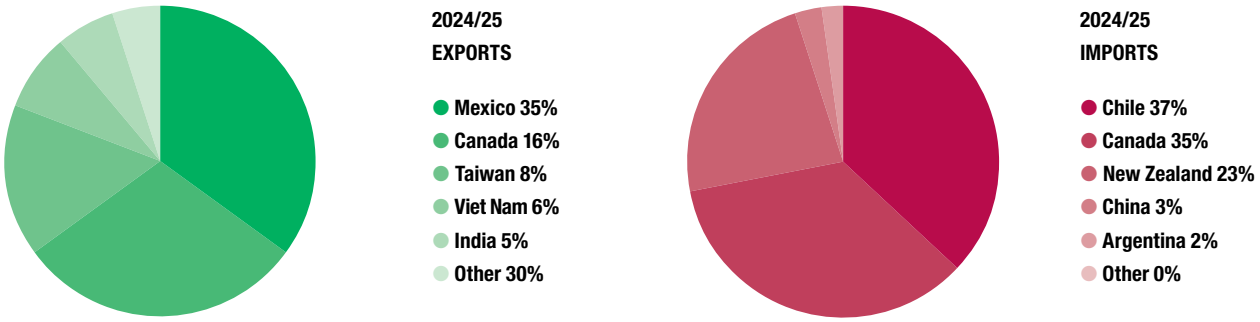
It may seem counterintuitive to have fresh apple imports in a market where supply already exceeds demand, but there are always varietal fluctuations and pressure from the retailers to ensure year-round supply. While fresh apple imports are certainly important and should be protected from tariffs, they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

Table 10: U.S. Fresh Apple Trade

	2024/25	2023/24	YR-OVER-YR % CHANGE	2024/25 $	2024/25 $ / BU
Total U.S. Exports	**44,167,683**	**46,363,064**	**-5%**	**$1,043,047,000**	**$23.62**
Conventional Exports	**35,380,918**	**38,891,072**	**-9%**	**$834,806,000**	**$23.59**
Organic Exports	**8,786,765**	**7,471,998**	**18%**	**$208,241,000**	**$23.70**
Mexico	15,622,378	17,307,511	-10%	$362,903,000	$23.23
Canada	6,927,819	7,388,836	-6%	$154,213,000	$22.26
Taiwan	3,448,976	3,841,099	-10%	$88,918,000	$25.78
Viet Nam	2,573,148	2,562,740	0%	$68,574,000	$26.65
India	2,154,790	2,281,881	-6%	$39,923,000	$18.53
Dominican Republic	1,505,257	1,330,940	13%	$38,907,000	$25.85
Guatemala	1,419,208	1,289,913	10%	$30,976,000	$21.83
Hong Kong	963,382	937,625	3%	$21,291,000	$22.10
Colombia	787,842	1,063,687	-26%	$17,528,000	$22.25
Indonesia	748,552	718,113	4%	$18,364,000	$24.53
Other (53)	8,016,329	7,640,720	5%	$201,450,000	$25.13
Total U.S. Imports	**4,540,877**	**4,313,276**	**5%**	**$147,013,000**	**$32.38**
Conventional Imports	**3,776,063**	**3,379,058**	**12%**	**$120,640,000**	**$31.95**
Organic Imports	**764,819**	**934,218**	**-18%**	**$26,372,000**	**$34.48**
Chile	1,693,474	1,700,828	0%	$53,535,000	$31.61
Canada	1,606,617	1,176,952	37%	$45,802,000	$28.51
New Zealand	1,022,660	1,130,865	-10%	$43,611,000	$42.64
China	128,214	144,214	-11%	$1,889,000	$14.73
Argentina	76,705	138,928	-45%	$1,591,000	$20.74
Other (4)	13,207	21,490	-39%	$585,000	$44.30
U.S. Balance of Trade	**39,626,806**	**42,049,788**	**-6%**	**$896,034,000**	
Conventional Balance of Trade	**31,604,855**	**35,512,014**	**-11%**	**$714,166,000**	
Organic Balance of Trade	**8,021,946**	**6,537,780**	**23%**	**$181,869,000**	

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

Figure 10: U.S. Fresh Apple Trading Partners



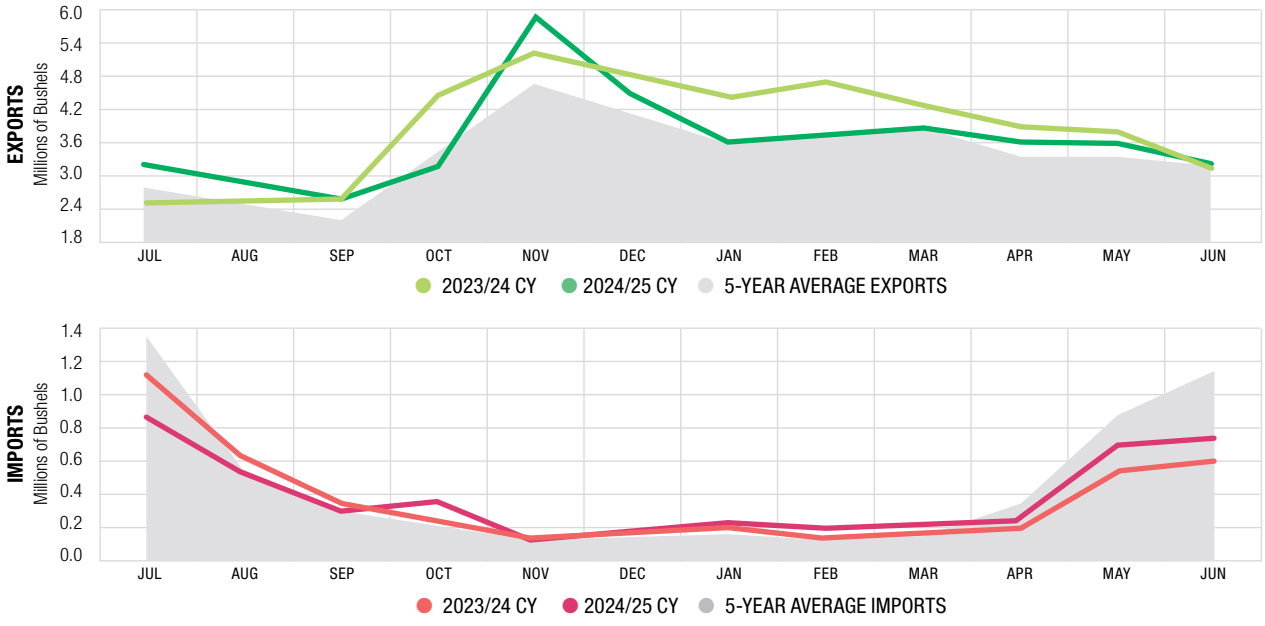
Sources: USDA, Foreign Agricultural Service; USApple

In 2024, the U.S. imported almost 428 million gallons of apple juice concentrate. What the processing market loses in price, it makes up for in quantity. The value of these imports – almost $688 million.

Türkiye continued to be the largest source of AJC in 2024, supplying close to 40% of imported juice. China provided 31% of U.S. juice imports, up 133% from 2023. This surge occurred as U.S. companies looked to fulfill existing contracts ahead of tariff deadlines. It also served to provide these AJC users with a 12- to 18-month supply that would give them time should adjustments have to be made. The 26% year over year decline in AJC imports from Ukraine are likely directly related to the ongoing conflict there.

On the AJC export side, U.S. processors don't compete as there is not a great deal of excess capacity. In 2024, the U.S. exported around 17 million gallons of apple juice concentrate resulting in a massive negative balance of trade (411 million gallons) valued at $620 million. The Dominican Republic and Canada were responsible for buying over half of U.S. AJC exports for almost $50 million (see **Table 11**).

Figure 11: U.S. Monthly Fresh Apple Trade



Sources: USDA, Foreign Agricultural Service; USApple

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

The following section explores global apple production more closely, highlighting a number of international 2025/26 apple crop forecasts and completing the picture of worldwide apple supply in the year to come.

Table 11: U.S. Apple Juice Concentrate Trade

	2024	2023	YR-OVER-YR % CHANGE	2024 $	2024 $ / BU
Total U.S. Imports	**427,768,119**	**436,187,069**	**-2%**	**$687,328,000**	**$1.61**
Türkiye	167,267,450	147,226,252	14%	$284,024,000	$1.70
China	133,741,355	57,430,438	133%	$151,196,000	$1.13
Ukraine	23,783,986	32,345,035	-26%	$49,365,000	$2.08
South Africa	18,741,550	9,174,958	104%	$27,096,000	$1.45
Moldova	16,258,254	24,809,608	-34%	$23,184,000	$1.43
Chile	14,171,296	40,296,004	-65%	$30,554,000	$2.16
Brazil	11,859,183	20,658,145	-43%	$17,108,000	$1.44
Spain	11,190,326	14,984,126	-25%	$22,102,000	$1.98
Argentina	8,342,103	10,369,438	-20%	$20,207,000	$2.42
Poland	8,015,665	56,859,536	-86%	$12,238,000	$1.53
Other (51)	14,396,951	12,491,030	15%	$50,254,000	$3.49
Total U.S. Exports	**16,502,640**	**14,181,044**	**16%**	**$67,257,000**	**$4.08**
Dominican Republic	6,037,625	4,006,802	51%	$23,206,000	$3.84
Canada	6,036,066	5,733,721	5%	$24,205,000	$4.01
Jamaica	687,138	656,494	5%	$2,822,000	$4.11
South Korea	631,847	821,284	-23%	$3,095,000	$4.90
Philippines	596,104	442,435	35%	$3,225,000	$5.41
Other (44)	2,513,861	2,520,307	0%	$10,704,000	$4.26
U.S. Balance of Trade	**(411,265,479)**	**(422,006,025)**	**-3%**	**$(620,071,000)**	

Sources: USDA, Foreign Agricultural Service; USApple
Note: Trade levels are reported in gallons.

CORE INSIGHTS

As discussed above, in the wake of the U.S. placing tariffs on imported steel and aluminum, India responded by instituting their own tariffs on imported American apples. Prior to the move, the U.S. was supplying 45% of all Indian fresh apple imports worth around $157 million. By 2022, U.S. shipments to India had fallen by 97%. In our absence, Türkiye and Iran stepped in to fill the void. In 2018, Iran and Türkiye combined were responsible for 7% of India's fresh apple imports. By 2022, those countries controlled 48% of the market. To make matters worse, while we were gone, India's fresh apple import market had grown by nearly 20%, so now Iran and Türkiye controlled a larger piece of a larger pie.

Just prior to the 2023/24 CY, India announced that it would be rolling back those tariffs and U.S. exporters went to work. Fortunately, their efforts have been successful as fresh apple exports to India totaled almost 2.3 million bushels in the 2023/24 season, up from just 58,000 bushels the year before (see **Table 10**). Unfortunately, it seems that this was achieved through aggressive, potentially unsustainable pricing. The takeaway here is that foreign markets are exceedingly competitive. Given the cost of production in the U.S. relative to many of our foreign competitors, we can ill afford to give up markets we've already won. Over the last decade, Türkiye has nearly doubled its production and are vying for second place with the U.S. They are standing by and would be happy to take any business the U.S. is foolish enough let them have through bad trade policies.

Global Apple Production

According to United Nations (UN) data, worldwide apple production topped 5.1 billion bushels in 2023 (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. [30]

5+

BILLION BUSHELS PRODUCED

[30] UN, Food and Agriculture Organization: FAOSTAT: 1961-2023.

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 2023, apple production has increased by 99%, acres harvested has fallen by 27% and average yield has increased by 172%.

In 2023, China alone was responsible for producing 2.6 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 almost 5 million acres, but by this metric, the U.S. falls to seventh in the world with slightly less than 300,000 acres. India takes the number two spot, followed by Russia, Türkiye and Poland.

Compared to India, in 2023, the U.S. farmed on 40% less land and produced 180% more apples with substantially better yields. India's yields are around 200 bushels per acre versus in the U.S. where the industry is over 900 bushels to the acre. By this measure, the U.S. ranks fifth in the world. New Zealand tops the list at 1,270 bushels per acre with Chile, Switzerland, Libya rounding out the top five. For reference, the global average is 370 bushels per acre.

The remaining portion of this section provides details on the 2025/26 CY production forecasts for select countries and regions.

CORE INSIGHTS

As noted above, the U.S. runs a massive net-negative AJC trade balance. In 2024, the U.S. imported 428 million gallons of AJC worth almost $700 million from 56 countries. AJC exports were just 16 million gallons, less than 4% of imports. In that year, China was responsible for providing the U.S. with 31% of its AJC needs. In early 2025, as promised, the incoming Administration began to institute a series of tariffs intended to reduce trade deficits and promote onshoring of lost manufacturing jobs. In mid-April, tariff rates on imported Chinese goods skyrocketed to 145%. Assuming no changes from 2024 levels and sources, the tariff bill would come out to almost $220 million.

Having planned for this this possibility, U.S. AJC importers had already stocked up on Chinese juice. Following the November 2024 election, buys from China grew by 315% through January as companies worked to ensure a 12- to 18-month supply ahead of the tariffs. In the weeks following the 145% tariff rate taking effect, the buying of Chinese juice had slowed to such a degree that there were "too few sales to establish a market price" (USDA, AMS). By mid-May, tariff rates on China had been lowered to 30%, although there are no assurances it will stay there.

Switching supply chains is not fast or free and so there are both incentives to begin diversifying suppliers and huge financial risks of doing so. For the moment, it seems as most of the AJC have provided themselves some time to make some adjustments, but they are following the Federal Reserve in its "wait and see" approach when it comes to making significant investments of time or money.

China

According to the World Apple and Pear Association (WAPA), China's 2025/26 production is estimated to be down by 5% year over year to around 2 billion bushels. To put this modest decrease into perspective, it's equivalent to all U.S. production outside of Washington, around 100 million bushels.

This is the second consecutive annual decline in production. According to intelligence from USDA's 2024 Fresh Deciduous Fruit report, "China's apple area started to decline in 2020 after the State Council issued Opinions on Preventing the 'Non-grain' Conversation of Farmland and Stabilizing Grain Production, prohibiting the fruit production on basic farmland. As a result, fruit orchards on basic farmland need to be converted to grain farms or production of other strategic commodities such as oilseeds."[31]

However, the country has started adopting dwarfing and high-density planting models and developing specialized breeding programs. In terms of varietals, "late maturing Fuji varieties still dominate apple production in China, accounting for more than 70 percent of total apples produced in the country. The early and mid-maturing varieties, such as Gala, hold the majority of the remaining 30 percent."

Looking forward, "Chinese fruit exports will continue increasing to neighboring countries given improved quality and competitive prices", so the U.S. must be ready to maintain and grow the Southeast Asian market with quality, consistency and premium branding.

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 almost 560 million bushels in the 2025/26 CY – equal to 2024/25 production levels and 7% lower than the five-year average.

Within Europe, Poland is the largest apple-producing country expected to produce around 173 million bushels – a 3% increase from last year and 15% below the five-year average. Italy is the number two producer, supplying Europe with around 20% 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 Red Jonaprince. The estimated 2025/26 CY production by variety is featured in **Table 13**.

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 "apple export volumes have increased 10 times over the last decade as growers have adapted their operations to capitalize on growing export opportunities. Proximity to export markets and competitive prices have also helped fuel Turkish apple exports."[32]

[31] USDA, Foreign Agricultural Service. Fresh Deciduous Fruit Annual: China. November 2024.
[32] USDA, Foreign Agricultural Service. Fresh Deciduous Fruit Annual: Türkiye. November 2024.

Table 12: European Apple Production, by Select Countries

	2025/26 (F)		2024/25		5-YR. AVERAGE	
Europe Total	**558,661,206**		**559,133,625**		**602,932,075**	
Poland	173,220,143	31%	167,446,138	30%	203,297,459	34%
Italy	117,999,661	21%	122,251,428	22%	113,317,468	19%
France	77,896,573	14%	75,167,044	13%	74,022,741	12%
Germany	52,490,952	9%	45,772,110	8%	51,577,610	9%
Spain	26,297,967	5%	28,660,060	5%	25,867,541	4%
Romania	23,201,001	4%	25,773,058	5%	28,334,616	5%
Portugal	15,904,759	3%	16,429,668	3%	16,219,704	3%
Netherlands	11,862,955	2%	10,183,245	2%	11,453,526	2%
United Kingdom	9,868,299	2%	9,605,844	2%	9,196,415	2%
Belgium	9,605,844	2%	8,398,552	2%	10,708,154	2%
Greece	9,343,390	2%	12,860,283	2%	13,385,193	2%
Hungary	8,398,552	2%	17,322,014	3%	21,311,327	4%
Austria	7,453,715	1%	3,936,821	1%	6,172,936	1%
Czech Rep	5,616,532	1%	1,889,674	0%	5,280,590	1%
Croatia	2,519,566	0%	3,464,403	1%	3,243,941	1%
Slovenia	1,837,183	0%	3,044,475	1%	2,572,057	0%
Slovakia	1,679,710	0%	1,889,674	0%	1,637,718	0%
Sweden	1,679,710	0%	1,679,710	0%	1,648,216	0%
Denmark	1,259,783	0%	1,102,310	0%	1,070,815	0%
Latvia	314,946	0%	419,928	0%	503,913	0%
Lithuania	209,964	0%	1,837,183	0%	2,110,136	0%

Sources: World Apple and Pear Association; USApple
Notes: Production levels are reported in 42-pound bushels.
Five-year averages do not include 2025/26 (F) data.

Additionally, "for the last decade, Türkiye's apple production has generally been trending upward as growers have invested in modernizing their operations, introduced the latest growing techniques and innovations, and have started planting higher-yielding trees. These investments have enabled Türkiye to produce larger volumes of high-quality apples, a large share of which are going for export."

"With 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 (a cousin of the Red Delicious), Golden, Amasya and Granny Smith, which collectively accounted for nearly three-quarters of total production in [marketing year] 2023/2024."

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

According to WAPA, Türkiye will have an absolutely disastrous year, falling from around 232 million bushels to 142 million bushels, a decline of almost 40%. This may provide opportunities for U.S. exporters to take back Indian market share if Türkiye cannot sustain their volume. On the other hand, a shortage may drive up the cost of AJC in Türkiye and around the world.

Table 13: European Apple Production, by Select Varieties

	2025/26 (F)		2024/25		5-YR. AVERAGE	
Europe Total	**558,661,206**		**559,133,625**		**602,932,075**	
Golden Delicious	108,078,871	19%	109,076,199	20%	120,361,754	20%
Gala	75,009,571	13%	74,957,080	13%	76,993,729	13%
Red Delicious	25,563,094	5%	31,599,553	6%	34,266,094	6%
Idared	24,408,293	4%	26,770,386	5%	33,762,181	6%
Red Jonaprince	20,471,471	4%	18,371,833	3%	24,261,318	4%
Shampion	19,894,071	4%	18,634,288	3%	22,245,666	4%
Granny Smith	18,214,360	3%	18,686,779	3%	19,064,714	3%
Cripps Pink	17,531,978	3%	16,849,596	3%	15,610,809	3%
Elstar	17,322,014	3%	16,009,740	3%	16,996,570	3%
Jonagold	15,327,358	3%	15,852,268	3%	19,348,165	3%
Fuji	14,854,940	3%	16,377,177	3%	16,503,155	3%
Ligol	9,973,281	2%	8,398,552	2%	11,862,955	2%
Braeburn	9,080,935	2%	8,713,498	2%	10,319,721	2%
Jonagored	7,768,661	1%	7,033,788	1%	10,802,638	2%
Other	175,162,308	31%	171,802,887	31%	181,230,262	30%

Sources: World Apple and Pear Association; USApple
Notes: Production levels are reported in 42-pound bushels.
Five-year averages do not include 2025/26 (F) data.

South America

Together, Chile, Brazil and Argentina are responsible for around 94% of total South American apple production. According to WAPA, in the 2025/26 CY[33], Chile is thought to have produced around 48 million bushels, even with last season. Brazil's production was estimated to be up 14% to 50 million bushels. Similarly, Argentia's apple production was growing, up 6% from last year to around 28 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 10**). 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 2025/26 crop will be around 1% above last year's figure with production totaling 43 million bushels. In terms of varieties, the USDA reported that, in 2023, "Mexican Golden Delicious (roughly 56 percent of total production) and Red Delicious (roughly 30 percent of total production) varieties continue to dominate the market with wholesale/food market prices per kilo ranging from 18 to 26 percent below U.S. apples." With respect to trade, USDA analysts believe that "increased domestic production, high retail price and inflation factors will limit further demand for imported apples."[34]

[33] 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 2025/26 crop has already been harvested and the remaining apples are in storage.
[34] USDA, Foreign Agricultural Service. Fresh Deciduous Fruit Annual: Mexico. November 2024.

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 10**). According to the Fruit and Vegetable Growers of Canada, Canadian production will increase to 22 million bushels – a 3% gain from 2024/25 levels (see **Table 14**). This represents an 8% increase from the five-year production average.

At the sub-national level, Ontario, the nation's largest apple-growing province, is expected to produce slightly more than last season with 9 million bushels. Quebec's production is estimated to decrease by 3% to 6 million bushels. Nova Scotia is projected to increase by 10% to 2.5 million bushels. British Columbia is expected to be up 2% from last season to almost 4 million bushels.

On a varietal basis, Gala is the number one apple grown in Canada with an expected 2025/26 production volume of more than 4 million bushels, around 20% of total production. Rounding out the top five are McIntosh, Honeycrisp, Ambrosia, and Others (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

	2025/26 (F)	2024/25	5-YR. AVERAGE
LEVELS			
Canada	**21,571,913**	**20,952,694**	**19,856,116**
Ontario	8,959,000	8,480,000	8,149,000
Quebec	6,067,222	6,232,380	5,400,675
British Columbia	3,832,500	3,769,050	3,939,608
Nova Scotia	2,474,191	2,249,264	2,167,294
New Brunswick	239,000	222,000	199,540
PERCENT CHANGE (VS. 2024/25)			
Canada		**3%**	**9%**
Ontario		6%	10%
Quebec		-3%	12%
British Columbia		2%	-3%
Nova Scotia		10%	14%
New Brunswick		8%	20%
MARKET SHARE			
Canada	**100%**	**100%**	**100%**
Ontario	42%	40%	41%
Quebec	28%	30%	27%
British Columbia	18%	18%	20%
Nova Scotia	11%	11%	11%
New Brunswick	1%	1%	1%

Source: Fruit & Vegetable Growers of Canada
Notes: Production levels are reported in 42-pound bushels.
Five-year averages do not include 2025/26 (F) data.

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

2025/26 (F)	CANADA	BRITISH COLUMBIA	NEW BRUNSWICK	NOVA SCOTIA	ONTARIO	QUEBEC
Total Varieties	**21,580,929**	**3,832,500**	**239,000**	**2,482,296**	**8,960,000**	**6,067,133**
Gala	4,307,108	1,680,000	25,000	124,046	2,279,000	199,062
Others	3,314,054	162,500	19,000	534,589	1,561,000	1,036,965
McIntosh	3,308,808	110,000	52,000	198,668	858,000	2,090,140
Honeycrisp	3,033,303	200,000	90,000	1,066,364	1,479,000	197,939
Ambrosia	3,001,542	1,500,000	13,000	141,029	1,255,000	92,513
Cortland	1,444,315	-	35,000	106,015	236,000	1,067,300
Red Delicious	1,402,170	35,000	-	64,193	502,000	800,977
Empire	1,013,082	-	3,000	10,845	417,000	582,237
Spy	601,950	-	-	228,950	373,000	-
Spartan	154,597	145,000	2,000	7,597	-	-

Source: Fruit & Vegetable Growers of Canada
Note: Production levels are reported in 42-pound bushels.

Appendix

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

2024	LEVELS		VALUES		YEAR-OVER-YEAR % CHANGE
APPLE JUICE CONCENTRATE					
World Total	**339,824,019**		**$503,637,000**		**-9%**
Turkey	127,234,085	37%	$189,257,000	38%	6%
China	110,209,996	32%	$127,567,000	25%	112%
Ukraine	18,869,463	6%	$30,248,000	6%	-37%
South Africa	18,436,564	5%	$26,634,000	5%	101%
Moldova	14,700,459	4%	$25,997,000	5%	-40%
APPLE JUICE CONCENTRATE - FROZEN					
World Total	**36,253,380**		**$52,499,000**		**-3%**
China	22,637,665	62%	$22,481,000	43%	362%
Brazil	11,669,719	32%	$16,688,000	32%	-42%
Ukraine	1,523,850	4%	$12,620,000	24%	41%
South Africa	304,987	1%	$461,000	1%	N/A
Thailand	32,414	0%	$74,000	0%	97%
APPLE JUICE CONCENTRATE - BRIX < 20					
World Total	**48,076,240**		**$119,363,000**		**114%**
Turkey	37,266,031	78%	$84,006,000	70%	162%
Canada	4,378,413	9%	$14,362,000	12%	12%
Ukraine	3,390,700	7%	$10,749,000	9%	164%
Moldova	1,561,468	3%	$5,212,000	4%	N/A
Poland	759,389	2%	$2,428,000	2%	-62%
APPLE JUICE CONCENTRATE - FROZEN, ORGANIC					
World Total	**3,735,868**		**$11,776,000**		**80%**
Turkey	2,851,367	76%	$10,662,000	91%	81%
China	884,025	24%	$1,111,000	9%	79%
Canada	476	0%	$3,000	0%	N/A
Argentina	0	0%	$-	0%	N/A
Austria	0	0%	$-	0%	N/A

Sources: USDA, Foreign Agricultural Service, USApple
Notes: Trade levels are reported in gallons.
Year-over-year changes are calculated on levels.

Appendix B: Global Apple Production, by Country: 2023

	World Total	5,109,434,596	
1	China	2,603,711,336	51.0%
2	United States of America	270,416,590	5.3%
3	Türkiye	241,590,501	4.7%
4	Poland	204,331,530	4.0%
5	India	150,963,979	3.0%
6	Italy	119,036,357	2.3%
7	Iran (Islamic Republic of)	114,290,491	2.2%
8	Russian Federation	109,348,695	2.1%
9	France	99,440,960	1.9%
10	Chile	77,474,002	1.5%
11	Uzbekistan	72,745,753	1.4%
12	South Africa	62,931,266	1.2%
13	Brazil	62,138,474	1.2%
14	Ukraine	61,558,764	1.2%
15	Germany	49,405,009	1.0%
16	Egypt	46,829,303	0.9%
17	Morocco	45,160,513	0.9%
18	Pakistan	43,126,856	0.8%
19	Mexico	42,755,640	0.8%
20	Democratic People's Republic of Korea	42,573,311	0.8%
21	Japan	31,694,037	0.6%
22	New Zealand	30,766,270	0.6%
23	Algeria	30,228,534	0.6%
24	Romania	28,037,517	0.5%
25	Argentina	27,754,539	0.5%
26	Spain	27,698,426	0.5%
27	Republic of Moldova	27,169,999	0.5%
28	Hungary	25,526,350	0.5%
29	United Kingdom	21,404,224	0.4%
30	Republic of Korea	20,703,901	0.4%
31	Serbia	19,930,290	0.4%
32	Canada	19,341,656	0.4%
33	Belarus	17,673,704	0.3%
34	Afghanistan	17,007,069	0.3%
35	Azerbaijan	15,841,061	0.3%
36	Portugal	15,339,431	0.3%
37	Australia	14,969,160	0.3%
38	Kazakhstan	13,200,162	0.3%
39	Greece	12,740,079	0.2%
40	Tajikistan	12,498,409	0.2%
41	Lebanon	12,352,993	0.2%
42	Syrian Arab Republic	11,581,919	0.2%
43	Belgium	10,656,188	0.2%
44	Netherlands (Kingdom of the)	10,393,209	0.2%
45	Austria	10,073,539	0.2%
46	Bosnia and Herzegovina	9,987,086	0.2%
47	Switzerland	8,989,069	0.2%
48	Kyrgyzstan	7,319,164	0.1%
49	Tunisia	7,000,366	0.1%
50	Peru	6,589,565	0.1%
51	Czechia	5,302,636	0.1%
52	Albania	5,105,998	0.1%
53	Armenia	4,977,465	0.1%
54	Israel	4,829,168	0.1%
55	North Macedonia	4,214,131	0.1%
56	Iraq	3,971,490	0.1%
57	Turkmenistan	3,432,517	0.1%
58	Croatia	3,229,768	0.1%
59	Nepal	2,770,673	0.1%
60	Georgia	2,645,544	0.1%
61	Uruguay	2,520,790	0.0%
62	El Salvador	2,341,625	0.0%
63	Lithuania	2,016,702	0.0%
64	Bulgaria	1,833,509	0.0%
65	Sweden	1,688,634	0.0%
66	Slovenia	1,606,223	0.0%
67	Yemen	1,578,361	0.0%
68	Slovakia	1,385,761	0.0%
69	Guatemala	1,342,260	0.0%
70	Denmark	1,283,404	0.0%
71	Ireland	1,154,276	0.0%
72	Norway	1,055,278	0.0%
73	Jordan	843,635	0.0%
74	Colombia	690,162	0.0%
75	Libya	472,465	0.0%
76	Finland	409,429	0.0%
77	Latvia	404,180	0.0%
78	Ecuador	377,331	0.0%
79	Madagascar	376,191	0.0%
80	Zimbabwe	260,573	0.0%
81	Malawi	165,961	0.0%
82	Cyprus	152,224	0.0%
83	Bolivia	144,297	0.0%
84	Bhutan	121,626	0.0%
85	Saint Vincent and the Grenadines	86,759	0.0%
86	Montenegro	78,954	0.0%
87	Estonia	51,966	0.0%
88	Luxembourg	51,966	0.0%
89	Palestine	50,988	0.0%
90	Kenya	41,408	0.0%
91	Paraguay	35,391	0.0%
92	Grenada	24,824	0.0%
93	Honduras	10,282	0.0%
94	Malta	525	0.0%

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

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