

ORGANIC RETAIL TRENDS IN APPLES, PEARS and SWEET CHERRIES

Apples: U.S. Average Retail Prices, by Major Variety, Regular Prices and Advertised Specials, 2017-18, 2018-19 and 2019-20

Table 1. Apples: U.S. Average Retail Prices, by Production Method
(\$ per pound)

Method	Year ending June 15, 2018	Year ending July 11, 2019	Year ending July 12, 2020
Organic Volume (% of total)	7.8	9.8	10.8
Conventional (\$/lb)	1.651	1.645	1.598
Organic (\$/lb)	2.234	2.150	2.020
Total (\$/lb)	1.696	1.694	1.644
<i>Organic Premium (\$/lb)</i>	0.583	0.505	0.422
<i>Organic Premium (%)</i>	35.3	30.7	26.4

Comment:

1. Average retail apple price was down about 3 percent in the most recent year because of a larger domestic apple crop. However, organic prices were down about 6 percent as the volume share of organic apples continued to increase.
2. Both the absolute price premium for organic apples, and the percent premium fell in the most recent season. However, the premium was still at a level that would incentivize the industry to produce more organic apples and the retailer to stock more organic apples.

**Table 2. Apples: U.S. Average Retail Prices, by Variety, by Rank
(\$ per pound)**

Variety	Rank	Year ending June 15, 2018	Year ending July 11, 2019	Year ending July 12, 2020
SweeTango/Minneiska	1	n.a.	2.391	2.304
Honeycrisp	2	2.596	2.550	2.284
Envy	3	n.a.	2.144	2.276
Kanzi/ Nicoter	4	2.189	2.273	n.a.
Kiku Fuji	5	2.086	2.094	n.a.
Opal	6	1.990	2.000	2.072
Ambrosia	7	n.a.	2.096	1.987
Pinova/ Pinata	8	1.933	1.947	n.a.
Jazz	9	n.a.	1.770	1.723
Pink Lady/ Cripps Pink	10	1.850	1.662	1.715
Braeburn	11	1.687	1.664	1.709
Golden Delicious	12	1.452	1.489	1.516
Fuji	13	1.552	1.512	1.474
Granny Smith	14	1.623	1.529	1.471
McIntosh	15	1.349	1.318	1.313
Red Delicious	16	1.346	1.300	1.270
Gala	17	1.298	1.335	1.259
Empire	18	1.238	1.211	1.197
Other	-	3.066	2.874	2.770

Comment:

1. Honeycrisp remains the highest-priced mainstream variety, but average prices have continued to fall as annual volume increases.
2. The next seven varieties in terms of price were all branded varieties, SweeTango, Envy, Kanzi, Kiku Fuji, Opal, Ambrosia and Pinova. The “Other” category included newer, branded varieties, but their volume remained relatively low and prices have been falling.
3. Newer, but well-established, varieties, such as Pink Lady/ Cripps Pink, Jazz and Braeburn had slightly better than average prices.
4. Traditional varieties, such as Golden Delicious, Fuji and Granny Smith, had prices close to the category average.
5. Other traditional varieties, including McIntosh, Red Delicious, Gala and Empire, were priced well below the category average.
6. The largest volume variety, Gala, had among the lowest retail prices in both seasons.

Table 3. U.S. Average Retail Prices Compared to Advertised Retail Prices, by Variety, 2018-19 and 2019-20. (\$ per pound)

Variety	Year ending June 16, 2019			Year ending July 12, 2020		
	Normal Retail (\$/lb)	Advertised Special (\$/lb)	Advertised Discount (%)	Normal Retail (\$/lb)	Advertised Special (\$/lb)	Advertised Discount (%)
Honeycrisp	2.547	2.278	- 10.6	2.284	1.977	- 13.4
Pink Lady/ Cripps Pink	1.883	1.605	- 14.8	1.715	1.441	- 16.0
Granny Smith	1.654	1.542	- 6.8	1.471	1.362	- 7.4
Braeburn	1.629	1.342	- 17.6	1.709	1.275	- 25.4
Fuji	1.542	1.490	- 3.4	1.474	1.291	- 12.4
Golden Delicious	1.497	1.184	- 20.9	1.516	1.080	- 28.8
Red Delicious	1.406	1.242	- 11.6	1.270	1.111	- 12.5
McIntosh	1.328	1.046	- 21.2	1.313	1.033	- 21.3
Gala	1.328	1.414	+ 6.5	1.259	1.251	- 0.6
Selected Varieties	1.674	1.613	- 3.6	1.572	1.436	- 8.7

Comment:

1. The average advertised retail discount for these nine major varieties was only 3.6% in 2018-19 but rose to 8.7% in 2019-20.
2. However, there were wide differences in the advertised discount for each major variety. The discount was over 20 percent in both seasons for Golden Delicious and McIntosh, two varieties with relatively low normal retail prices.
3. The lowest advertised discount (in percent) in both years was for Granny Smith and Gala. The advertised discount for Honeycrisp, was almost twice as wide in 2018-19 as in 2017-18, and increased again in 2019-20.
4. The Gala variety was an anomaly in both years since the advertised price was either higher, or not significantly different, from the normal price.

**Table 4. Pears: U.S. Average Retail Prices, by Production Method
(\$ per pound)**

Method	Year ending May 19, 2018	Year ending June 5, 2019	Year ending June 6, 2020
Organic Volume (% of total)	4.3	4.0	4.8
Conventional (\$/lb)	1.575	1.567	1.577
Organic (\$/lb)	2.262	2.297	2.143
Total (\$/lb)	1.603	1.597	1.604
<i>Organic Premium (\$/lb)</i>	0.687	0.730	0.566
<i>Organic Premium (%)</i>	43.6	46.6	35.9

Comment:

1. The upward trend in organic pear volume is slower than for apples.
2. The conventional price of pears has been very stable.
3. The organic premium for pears has fallen as organic share of volume has risen.

**Table 5. Pears: U.S. Average Retail Prices, by Variety, by Rank
(\$ per pound)**

Variety	Rank	Year ending May 19, 2018	Year ending June 5, 2019	Year ending June 6, 2020
Asian	1	2.903	3.015	3.111
Red Anjou	2	1.718	1.821	1.703
Bosc	3	1.693	1.617	1.677
Anjou	4	1.507	1.652	1.619
Bartlett	5	1.503	1.548	1.577

Comment:

1. Asian pears command a much higher price than western pears.
2. Summer pears, like Bartlett, command lower prices than winter pears like Anjou or Bosc.
3. Red Anjou normally gain a small premium over green Anjou.

**Table 6. Sweet Cherries: U.S. Average Retail Prices, by Production Method
(\$ per pound)**

Method	Year ending March 24, 2018	Year ending April 18, 2019	Year ending April 19, 2020
Organic Volume (% of total)	1.2	1.2	1.6
Conventional	2.940	3.051	3.012
Organic	4.243	4.152	3.465
Total	2.954	3.056	3.013
<i>Organic Premium (\$/lb)</i>	1.303	1.101	0.453
<i>Organic Premium (%)</i>	44.3	36.1	15.0

Comment:

1. Organic volume in sweet cherries remains small relative to apples or pears.
2. While the price of conventional sweet cherries has been relatively stable, that has not been the case for organic sweet cherries.
3. The organic premium fell sharply in the 2019-20 season.

**Table 7. Sweet Cherries: U.S. Average Retail Prices, by Type, by Rank
(\$ per pound)**

Variety	Rank	Year ending March 24, 2018	Year ending April 18, 2019	Year ending April 19, 2020
Other	1	n.a.	4.976	4.682
Golden/ Rainier	2	4.494	4.469	4.522
Regular Red/ Black	3	3.002	2.980	2.932

Comment:

1. Prices for Rainier and for Red sweet cherries have been stable from year to year.
2. On average Rainier sweet cherries have maintained a more than 50 percent price premium over Red sweet cherries.