

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 to 2020-21

**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	Year ending July 11, 2021
Organic Volume (% of total)	7.8	9.8	8.3	8.4
Conventional (\$/lb)	1.651	1.645	1.622	1.667
Organic (\$/lb)	2.234	2.150	1.880	2.028
Total (\$/lb)	1.696	1.694	1.643	1.697
<i>Organic Premium (\$/lb)</i>	0.583	0.505	0.258	0.331
<i>Organic Premium (%)</i>	35.3	30.7	15.9	19.9

Comment:

1. Average retail apple price was up about 3 percent in the most recent year because of a smaller domestic apple crop. Organic prices were up about 8 percent, although the volume share of organic apples increased marginally.
2. Both the absolute price premium for organic apples, and the percent premium fell in the two most recent seasons. The organic premium is now approaching a level where there is less incentive for the industry to produce and the retailer to stock more organic apples.

Table 2. Apples: U.S. Average Retail Prices, by Variety, by Rank

(\$ per pound)

Variety	Year ending June 15, 2018	Year ending July 11, 2019	Year ending July 12, 2020	Year ending July 11, 2021
SweeTango/Minneiska	n.a.	2.391	2.304	2.008
Honeycrisp	2.596	2.550	2.284	2.393
Envy	n.a.	2.144	2.276	2.222
Kanzi/ Nicoter	2.189	2.273	n.a.	n.a.
Kiku Fuji	2.086	2.094	n.a.	1.905
Opal	1.990	2.000	2.072	2.020
Ambrosia	n.a.	2.096	1.987	2.060
Pinova/ Pinata	1.933	1.947	n.a.	1.692
Jazz	n.a.	1.770	1.723	1.658
Pink Lady/ Cripps Pink	1.850	1.662	1.715	1.666
Braeburn	1.687	1.664	1.709	1.732
Golden Delicious	1.452	1.489	1.516	1.641
Fuji	1.552	1.512	1.474	1.449
Granny Smith	1.623	1.529	1.471	1.485
McIntosh	1.349	1.318	1.313	1.333
Red Delicious	1.346	1.300	1.270	1.307
Gala	1.298	1.335	1.259	1.296
Empire	1.238	1.211	1.197	1.202
Other	3.066	2.874	2.770	2.620

Comment:

1. Honeycrisp remains the highest-priced mainstream variety. Its average price rebounded slightly in the latest season but remains below past peaks.
2. Four other branded varieties, SweeTango/Minniesja, Envy, Opal and Ambrosia, had average prices above \$2 per lb in the most recent season, although Ambrosia is no longer a restricted variety. The “Other” category included newer, branded varieties, but their volume remained relatively low and prices have been falling. Kiku Fuji fell below the \$2 level.
3. Branded varieties like Pinova/Pinata and Jazz, and some well-established, varieties like Pink Lady/ Cripps Pink and Braeburn had prices close to the overall average. Golden Delicious was the only traditional variety with price close to the average.
4. Long-established varieties like Fuji, Granny Smith, McIntosh, Red Delicious and Gala remained at below average prices.
5. Empire again had the lowest reported price.
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 2020-21. (\$ per pound)

Variety	Year ending June 16, 2019			Year ending July 11, 2021		
	Normal Retail	Advertised Special	Advertised Discount	Normal Retail	Advertised Special	Advertised Discount
	(\$/lb)	(\$/lb)	(%)	(\$/lb)	(\$/lb)	(%)
Honeycrisp	2.547	2.278	- 10.6	2.393	2.095	- 12.5
Pink Lady/ Cripps Pink	1.883	1.605	- 14.8	1.666	1.412	- 15.2
Granny Smith	1.654	1.542	- 6.8	1.489	1.366	- 8.3
Braeburn	1.629	1.342	- 17.6	1.732	1.275	- 26.4
Fuji	1.542	1.490	- 3.4	1.449	1.288	- 11.1
Golden Delicious	1.497	1.184	- 20.9	1.641	1.158	- 29.4
Red Delicious	1.406	1.242	- 11.6	1.307	1.205	- 7.8
McIntosh	1.328	1.046	- 21.2	1.333	1.135	- 14.9
Gala	1.328	1.414	+ 6.5	1.296	1.296	- 0.0
Selected Varieties	1.674	1.613	- 3.6	1.667	1.451	- 13.0

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 and 13.0% in 2020-21.
2. However, there were wide differences in the advertised discount for each major variety. The discount was over 20 percent for Golden Delicious and Braeburn, and was over 10 percent for Honeycrisp, Cripps/Pink Lady, Fuji and McIntosh.
3. The lowest advertised discount (in percent) was for Granny Smith, Red Delicious and Gala.
4. The Gala variety was an anomaly in the last two seasons 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	Year ending June 13, 2021
Organic Volume (% of total)	4.3	4.0	7.1	7.6
Conventional (\$/lb)	1.575	1.567	1.576	1.655
Organic (\$/lb)	2.262	2.297	2.017	1.990
Total (\$/lb)	1.603	1.597	1.607	1.681
<i>Organic Premium (\$/lb)</i>	0.687	0.730	0.441	0.335
<i>Organic Premium (%)</i>	43.6	46.6	28.0	20.2

Comment:

1. The upward trend in organic pear volume is slower than for apples.
2. The conventional price of pears rose in 2020-21 after being stable for three seasons.
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	Year ending June 13, 2021
Asian	1	2.903	3.015	3.111	2.819
Red Anjou	2	1.718	1.821	1.703	1.814
Bosc	3	1.693	1.617	1.677	1.724
Anjou	4	1.507	1.652	1.619	1.702
Bartlett	5	1.503	1.548	1.577	1.654

Comment:

1. Most pear varieties had higher prices in 2020-21 than in the previous season.
2. Asian pears command a much higher price on much smaller volume than western pears.
3. Summer pears, like Bartlett, command lower prices than winter pears like Anjou or Bosc.
4. 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	Year ending April 18, 2021
Organic Volume (% of total)	1.2	1.2	1.6	1.5
Conventional	2.940	3.051	3.012	3.460
Organic	4.243	4.152	3.465	3.326
Total	2.954	3.056	3.013	3.457
<i>Organic Premium (\$/lb)</i>	1.303	1.101	0.453	- .134
<i>Organic Premium (%)</i>	44.3	36.1	15.0	- 3.9

Comment:

1. Organic volume in sweet cherries remains small relative to apples or pears.
2. While the price of conventional sweet cherries has strengthened over time, organic prices have fallen substantially.
3. The organic premium, which has been falling, turned negative in 2020-21.

**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	Year ending April 18, 2021
Other	1	n.a.	4.976	4.682	n.a.
Golden/ Rainier	2	4.494	4.469	4.573	5.047
Regular Red/ Black	3	3.002	2.980	2.932	3.388

Comment:

1. Prices for Rainier and for Red sweet cherries rose in 2020-21 after having been stable the previous three years.
2. On average Rainier sweet cherries have maintained a premium of 50 percent or more over Red sweet cherries.