

# APPLE MARKET ANALYSIS

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# TOP APPLE-PRODUCING COUNTRIES, 2024/2025 MARKET YEAR

Country	Share of global production, (%)	Production volume, 2024/2025, (million tons)
China	57	49.3
EU	13	11.54
USA	6	4.78
Turkey	5	4.57
India	3	2.55
Iran	3	2.18
Russia	2	1.6
South Africa	2	1.35
Brazil	1	1.18
Ukraine	1	1.17

Source: FAO, USDA, FAS, WAPA.

**Global trends:**  
Global apple production for the 2025/26 season is projected to reach 81.7 million tons, the lowest level in the past five years due to reduced harvests in China, Turkey, and certain EU countries.

## LEADING EUROPEAN COUNTRIES IN APPLE PRODUCTION (IN TONS), 2021 AND 2025

Country	Production, 2021	Production, 2025	2025 as a percentage of 2021
Turkey*	4,493,264	4,570,000	101,7
Poland	4,067,400	3,750,000	92,2
Russia*	2,215,300	2,050,000	92,5
Italy	2,211,740	2,248,000	101,6
France	1,633,080	1,504,000	92,1
<b>Ukraine</b>	<b>1,278,870</b>	<b>1,173,000</b>	91,7
Germany	1,004,630	1,060,000	105,5

The top 5 EU countries plus Ukraine together dominate Europe (≈85%+ of the continent's total harvest, excluding Turkey and Russia).

# **SPECIFIC CHARACTERISTICS OF THE APPLE MARKET**

**High capital intensity and a long investment cycle**

**Long-term storage technologies**

**Varietal differentiation as a branding tool**

**Two-tier market structure**

**Global hyper competition and seasonal substitutability**

**Sensitivity to labor costs**

# Trends in Apple Production in Ukraine

Year	All categories of farms	Including:					
		Agricultural enterprises		private farms		Farming operations (based on overall enterprise figures)	
		in total	as a percentage of the total number	in total	as a percentage of the total number	in total	as a percentage of the total number
Area of plantations, thousand hectares							
2020	94,9	33,7	35,5	61,2	64,5	8,5	25,2
2022	84,5	25,6	30,3	58,9	69,7	7,8	30,5
2023	82,5	24,3	29,5	58,2	70,5	7,0	28,8
2024	75,6						
Yield, c/ha							
2020	130,4	108,0	82,8	141,6	108,6	118,8	110,0
2022	146,9	142,1	96,7	148,8	101,3	191,0	134,4
2023	154,8	166,1	107,3	150,4	97,2	225,1	135,5
2024		133,1					
Gross harvest, thousand centners							
2020	11145,7	3070,6	27,5	8075,1	72,5	831,2	27,1
2022	11291,2	3118,8	27,6	8172,4	72,4	1281,4	41,1
2023	11727,5	3560,8	30,4	8166,7	69,6	1427,2	30,1
2024							

Area under apple orchards in Ukraine in 2024 75,600 hectares



This accounts for 45% of the area planted with fruit and berry crops and over 87% of the area planted with pome fruit crops

Source: State Statistics Service of Ukraine. Data for 2024 are incomplete.

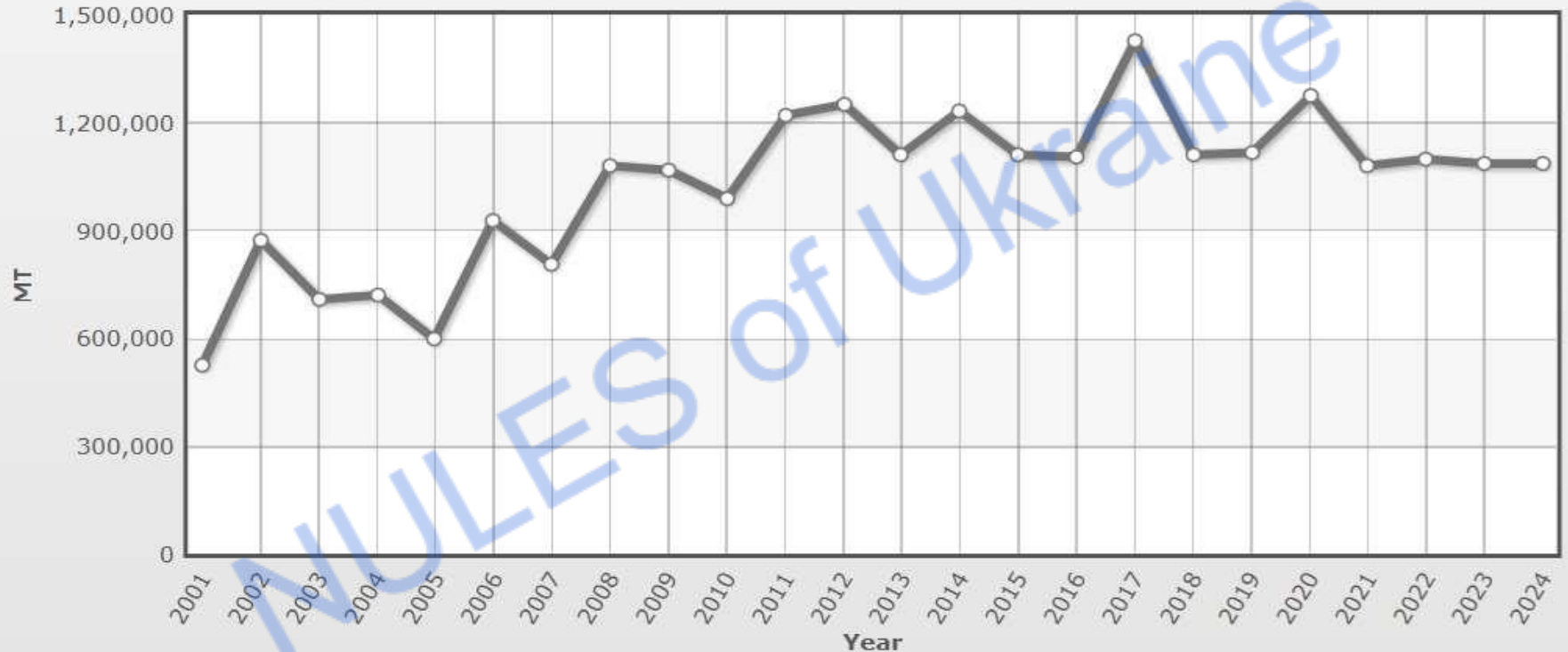
According to FAO estimates, annual consumption of fresh apples in Ukraine averages 16–24 kg per person per year (2022–2024)

According to estimates, over the past decades, apple consumption in Ukraine has averaged 22–24 kg per person per year

**This is significantly lower than the recommended amount (50 kg) and the European average (~23–30 kg).**

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## Domestic consumption of fresh apples in Ukraine, in thousands of tons

<https://www.indexmundi.com/agriculture/?country=ua&commodity=apples&graph=domestic-consumption>

## WHOLESALE PRICES FOR APPLES (SHUVAR MARKET, STOLICHNY MARKET, February 2021–February 2025, UAH/kg

Apple variety	Shuvar Market		2025 as a percentage of 2021	“Stolichny” Market		2025 as a % of 2021
	2021 p.	2025 p.		2021 p.	2025 p.	
<b>Gala</b>	10.00	28.00	280,0	11.00	38,50	350,0
<b>Aidarad</b>	12.50	25.00	200,0	10.00	40,70	407,0
<b>Golden</b>	15.50	20.00	129,0	13.50	41,50	307,4
<b>Renet Simirenka</b>	14.00	35.00	250,0	15.00	45,00	300,0
<b>Black Prince / Fuji</b>	15.50	30.00	193,5	16.50	50,00	303,0

Source: estimated data.

## APPLE PRICES IN SUPERMARKETS (February 2021 – February 2025), UAH/kg

Apple variety	2021 (on average)	2025 p.		
		Metro	Auchan	Novus
<b>Apple Ukrainian</b>	12.00 – 15.00	41.50	38.90	29.99 – 36.99
<b>Gala</b>	14.00 – 16.00	45.00 – 59.90	34.90	42.99 – 54.99
<b>Aidarad</b>	16.00 – 18.00	46.50 – 51.90	44.50	69.99 (premium)
<b>Golden Delicious</b>	18.00 – 22.00	59.90	42.90	44.99 – 47.99
<b>Renet Symyrenko</b>	18.00 – 20.00	56.90	49.90	59.99

Source: estimated data.

## MARKET TRENDS THAT INFLUENCED APPLE PRICING, 2021–2025

**2021: LOW MARGINS**

**2022: LOGISTICS SHOCK**

**2023: GRADUAL GROWTH**

**2024–2025: SYSTEMIC  
INFLATION AND POOR  
HARVEST**



Яблуко Гала Преміум

4.9



74.90 грн



Яблуко Симиренко Україна

4.7



62.99 грн

## PROFITABILITY OF APPLE PRODUCTION (FOR INTENSIVE ORCHARDS), 2025

Comparison parameter	Year 2021	Year 2025	Percentage change (%)
Gross apple harvest (thousands of tons)	1 301 – 2 235	1 173	-10 до -47
Area of industrial plantations (thousand hectares)	190,5 (general)	75,6 (intensive orchards)	-60 (consolidation)
Average cost (UAH/kg)	8,00	18,50 – 22,50	+131 до +181
Average selling price (UAH/kg)	21,40 (July)	35,00 – 45,00	+63 до +110
Profitability of production (%)	60% – 75%	40% – 65%	-10 до -20 в.п.
Storage cost (increase)	Consistently	+20% – 25% (generation)	+25
Average salary in the industry (UAH)	14 500	25 084 – 27 500	+72 до +90

Source: estimated data.



# THE STRUCTURE OF THE APPLE PROCESSING INDUSTRY IN UKRAINE

**Apple concentrate:**  
~85% of total processing volume  
(mostly for export)

**Cold-pressed juices:** ~10% (a rapidly growing domestic segment).

**Dried foods, chips, and purees for baby food:**  
~5%.


The global apple concentrate market is showing steady growth and is projected to reach a value of \$4.91 billion by 2032, with a CAGR of 6.6%.

## COMPARISON OF APPLE PRICES IN UKRAINE(2025/26 season)

Indicator	Dessert Apple (Gala, Grade 1)	Technical apple (for processing)
Estimated price (UAH/kg)	25 - 35	12 - 18
Growth compared to 2023	+40%	+150%
Quality requirements	Size 65+, color, no damage	Minimum (sugar content/Brix)
Logistics costs	High (packaging, sorting, refrigerator)	Low (bulk loading into dump trucks)

Source: estimated data

## KEY TRENDS IN THE PROCESSING SECTOR, 2024–2025



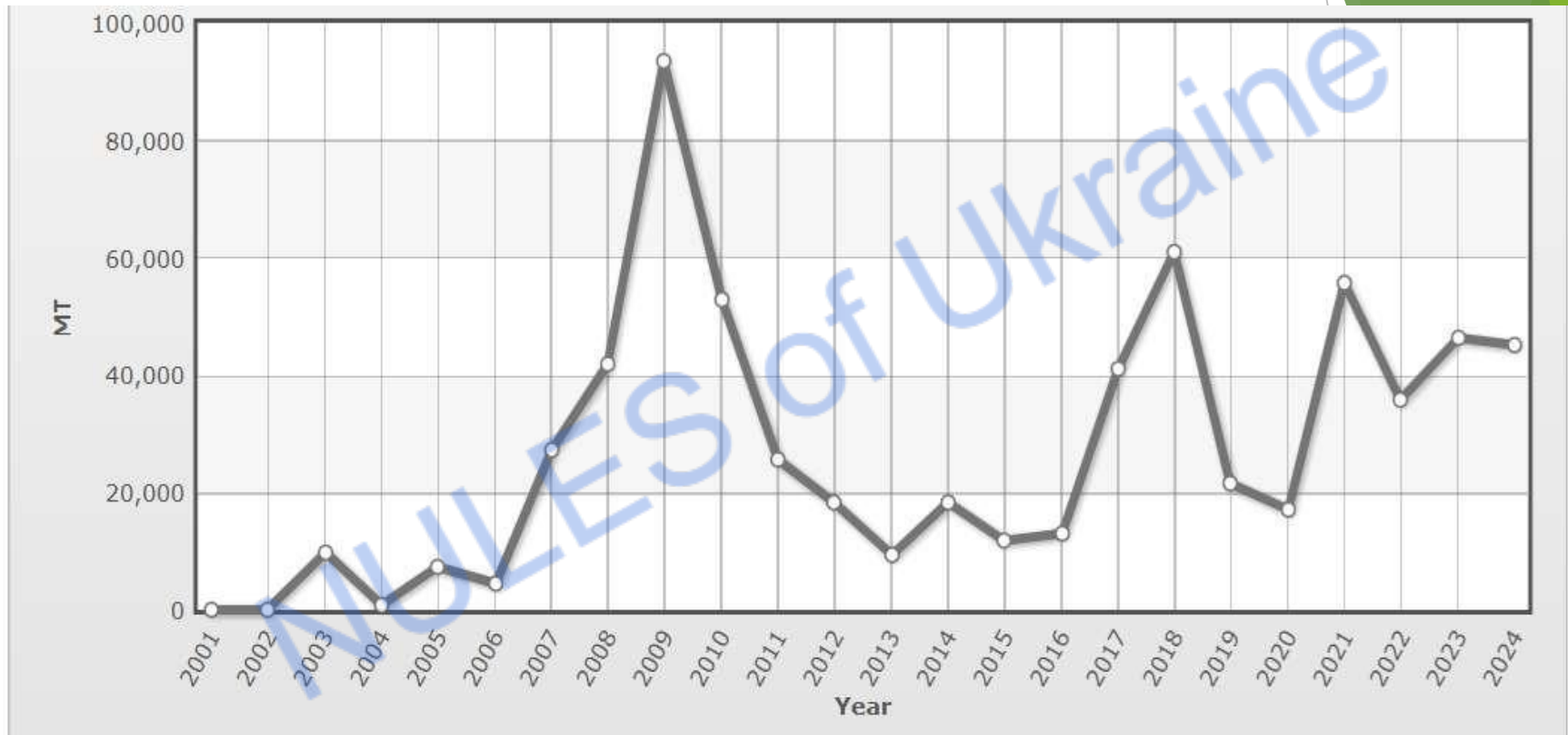
**Rising prices for industrial apples**



**Energy independence**



**Export orientation**



## Exports of fresh apples from Ukraine, in thousands of tons

## UKRAINIAN APPLE EXPORT MARKETS, 2024

Purchasing country	Export volume, thousand tons	Share of total apple exports, %
United Arab Emirates	7,93	20,9
Saudi Arabia	6,34	16,7
Iraq	3,26	8,6
Uzbekistan	3,24	8,5
Georgia	2,57	6,8
Turkey	2,52	6,6
Romania	2,29	6,0

In total, these seven countries accounted for 74.2% of the total volume of apple exports.

Source: State Statistics Service of Ukraine.

The Swedish market is also a major European importer of Ukrainian apples (US\$1.19 million) in 2024 (ranking 8th among buyer countries)

## BRAND STRATEGY: THE “MAGIC FORMULA” AND PREMIUM NICHE MARKETS

### The “three Gs” formula: Gala, Golden, Granny (Granny Smith)

Variety	Export Features	Target audience
<b>Gala</b>	Small/medium size, striped coloration	Children, the UAE and EU markets
<b>Golden</b>	Golden-yellow color, Honey flavor	Traditional consumer, Ukraine, CIS
<b>Granny Smith</b>	Pure green, no blush, high acidity	Premium chains, juice brands
<b>Red Delicious</b>	Deep red, elongated shape	The Middle East, India
<b>Fuji</b>	Firm flesh, sweet flavor,	Asia, the global market

## ANALYSIS OF EXPORT ACTIVITY IN THE 2024–2025 SEASON: The Paradox of Volume and Revenue

In the 2024/2025 marketing year, Ukraine exported 16,800 metric tons of apples to foreign markets—a 64% decrease in physical volume compared to the previous 2023–2024 season.

The decline in export volumes was the result of a combination of adverse factors:

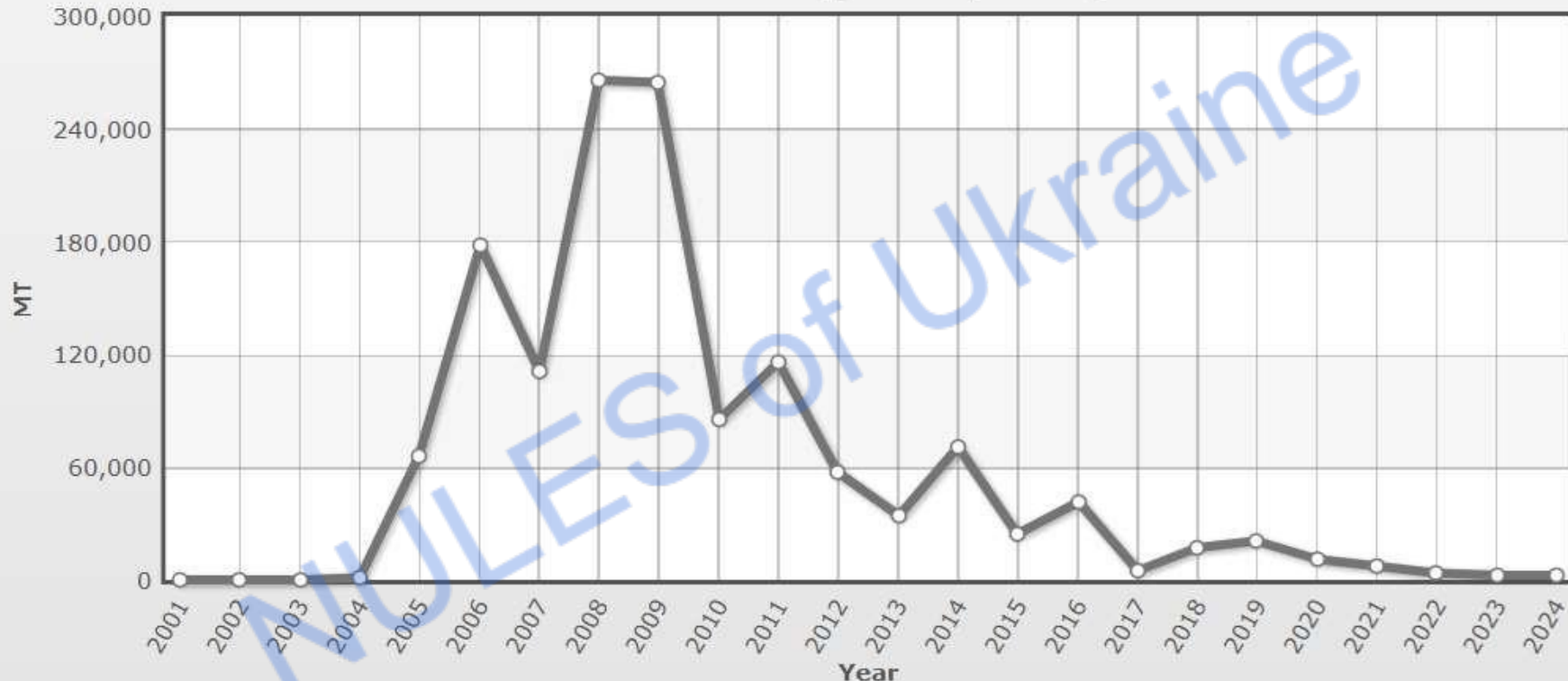
- extreme weather conditions in the spring, which damaged the blossoms;
- an energy shortage, which hampered the operation of cold storage facilities;
- an overall decline in crop yields in certain regions.

Along with a decline in export volumes, there was an unusual price trend.

**The average export price of Ukrainian apples rose to a record \$ 600 per ton.**

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## Volumes of fresh apple imports to Ukraine, in thousands of tons

<https://www.indexmundi.com/agriculture/?country=ua&commodity=apples&graph=import>

## KEY ACHIEVEMENTS IN THE INDUSTRY

**Quality advantage:** Ukrainian apples are officially recognized as superior to Polish and Serbian apples based on organoleptic criteria.

**Geographical resilience:** successful operations with the UAE and Saudi Arabia despite a logistics blockade.

**Innovation:** rapid adoption of new varieties and GLOBALG.A.P. standards

## IN TERMS OF THE DEGREE OF COMPETITION, THE APPLE MARKET IN UKRAINE IS CLOSE TO PERFECT COMPETITION (though with some elements of imperfection)

### Factors pointing to perfect competition

- A large number of producers (thousands of farms, horticultural cooperatives, and small- and medium-sized growers)
- The product is relatively standardized- No single producer has a significant influence on the market price
- Fairly free entry/exit (it is possible to plant an orchard, but this is a long-term process)
- - The price is determined by the interaction of supply and demand

### Deviations from “ideal” perfect competition

- Seasonality → short-term price fluctuations
- Storage and sorting → some large farms with high-capacity refrigeration facilities have an advantage
- Export/processing → competition between sales channels (fresh market, processing, export)
- Differentiation by variety, quality, packaging, and organic status → moving toward elements of monopolistic

## STRATEGIC FORECAST THROUGH 2035 AREAS OF DEVELOPMENT

**Technological intensification:**  
transitioning to  
greenhouse  
cultivation under  
plastic sheeting with  
mandatory irrigation  
to protect against  
climate change.

**Expansion into  
Asia:**  
Direct shipments  
to India, Vietnam,  
and Malaysia will  
become a regular  
feature.

**Development  
of processing:**  
production of high-  
value-added  
products (chips,  
fruit leather,  
premium ciders)  
made from apples.

Source: Based on our own research.

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THANK YOU  
FOR YOUR  
ATTENTION!