

Required Report: Required - Public Distribution

Date: December 02, 2025

Report Number: CA2025-0039

Report Name: Fresh Deciduous Fruit Annual

Country: Canada

Post: Ottawa

Report Category: Fresh Deciduous Fruit

Prepared By: Alexandra Watters

Approved By: Tacarra Birmingham

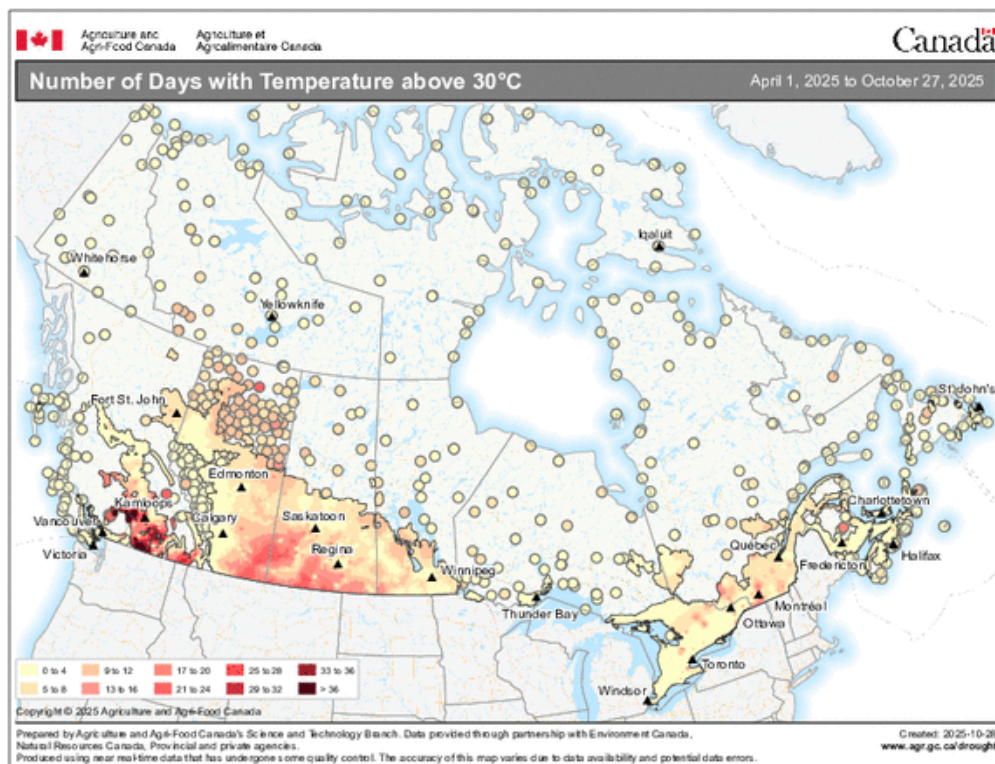
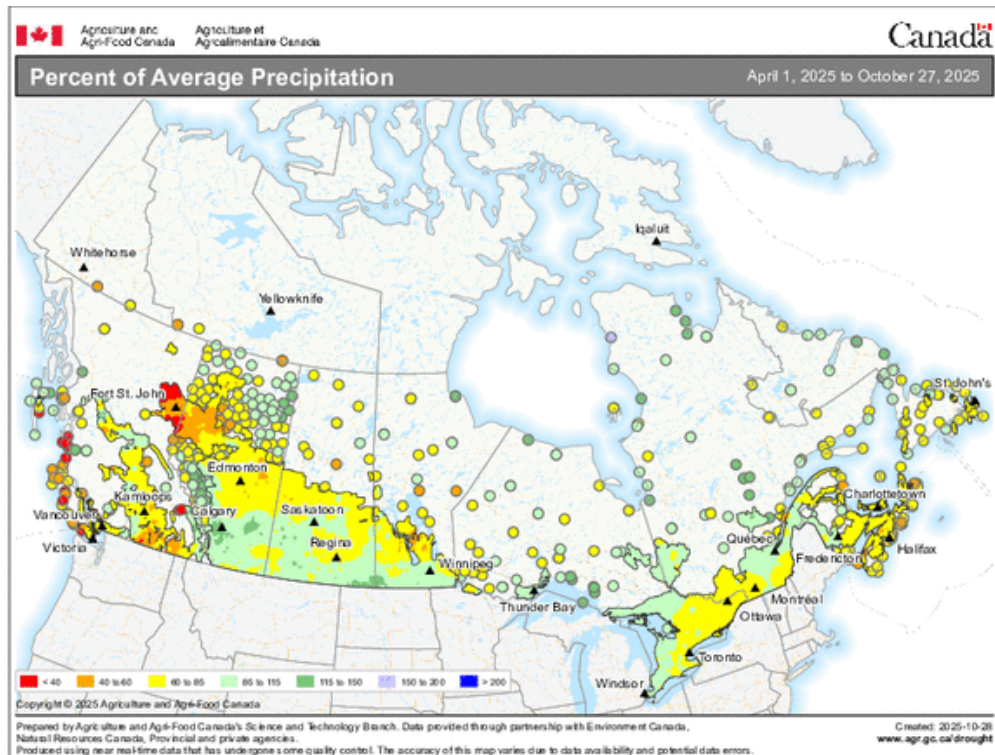
Report Highlights:

Canadian apple production is forecast to remain relatively stable in MY 2025/26, as summer drought impacted yields and sizing. Pear production is forecast to remain relatively stable on MY 2024/25 volumes. Drought, hail, and disease have impacted the MY 2025/26 crop, but it will recover somewhat on volume from 2024 losses. Production of table grapes is forecast grow substantially in MY 2025/26. However, this growth in volume is predominately a recovery from the substantial losses of MY 2024/25. Imports of apples and pears are forecast to be up in MY 2025/26 while imports of fresh grapes will lower with greater domestic production relative to MY 2024/25.

Executive Summary:

- Early production estimates from industry suggested that the MY 2025/26 crop would see a potential 3 percent increase. However, drought conditions across much of the Eastern Canada growing region has meant that the final production numbers will come in lower. Ontario, Quebec, New Brunswick, and Nova Scotia all dealt with significant drought. B.C. also saw high temperatures and regional hail damage, with the Ambrosia crop particularly impacted. With these factors, FAS/Ottawa has forecast stability in production for MY 2025/26.
- A strengthened domestic demand for apples emerged in 2024 following years of declining consumption. FAS/Ottawa is forecasting consumption to remain steady for MY 2025/26 as a large U.S. crop and ample Canadian crop should support competitive pricing against other fresh fruit commodities and consumers look for bargains and storability. To this end, FAS/Ottawa also forecasts a four percent growth in imports. Canada has also announced new market access for Ukraine and Australia.
- FAS/Ottawa forecasts MY 2025/26 pear production up slightly. MY 2024/25 production was negatively impacted by a January 2024 extreme cold event in British Columbia, while growing conditions were improved in MY 2025/26, there are likely still lingering impacts, but production should return to average. In Ontario, the second largest pear producing province in Canada, drought has impacted MY 2025/26 production. Industry estimates the overall crop to be down close to four percent while the Bosc variety may be down over 40 percent.
- Imports of fresh pears are forecast to grow in MY 2025/26 following a decline in MY 2024/25. The decline in MY 2024/25 was driven by a reduced U.S. pear crop. On expectations of a large U.S. pear crop for MY 2025/26, FAS/Ottawa is forecasting imports of fresh pears to Canada to be up 14 percent, driven largely by imports of U.S. pears.
- FAS/Ottawa forecasts significant growth in Canada's table grape crop for MY 2025/26, as industry recovers from devastating losses in MY 2024/25. Production will however remain below MY 2023/24 as the Ontario crop was impacted by drought.
- Imports of fresh table grapes are forecast to decline three percent on a larger Canadian crop for MY 2025/26.

Figure 1. Precipitation and temperature maps for 2025 growing season.



Source: Agriculture and Agri-Food Canada

APPLES

Table 1. Production, Supply, and Distribution of fresh apples.

NOTE: "NEW FAS/Ottawa" data reflects FAS/Ottawa's assessments and are NOT official USDA data

APPLES Fresh Canada	2023/2024		2024/2025		2025/2026*	
	Marketing Year: July-June					
	USDA Official	NEW FAS/Ottawa Data	USDA Official	NEW FAS/Ottawa Data	USDA Official	NEW FAS/Ottawa Estimates
Production	363,592	355,639	382,000	377,432	0	377,390
Imports	163,900	163,871	160,000	168,732	0	175,000
Total Supply	527,492	519,510	542,000	546,164	0	552,390
Domestic Consumption	470,192	462,084	480,000	493,257	0	498,390
Exports	57,300	57,426	62,000	52,907	0	54,000
Total Distribution	527,492	519,510	542,000	546,164	0	552,390

*Data in hectares or metric tons / *FAS/Ottawa forecast*

Production:

FAS/Ottawa forecasts relative stability in Canadian apple production for MY 2025/26. While early crop estimates projected a potential three percent production increase, drought and temperature are likely to have negatively impacted final production volumes in Ontario, Quebec, New Brunswick, and Nova Scotia. Regional hail damage has also affected certain B.C. orchards and production is anticipated to be down on earlier estimates as high temperatures also impacted the crop. Reportedly, Ambrosia production in B.C. will be impacted and there are some quality concerns.

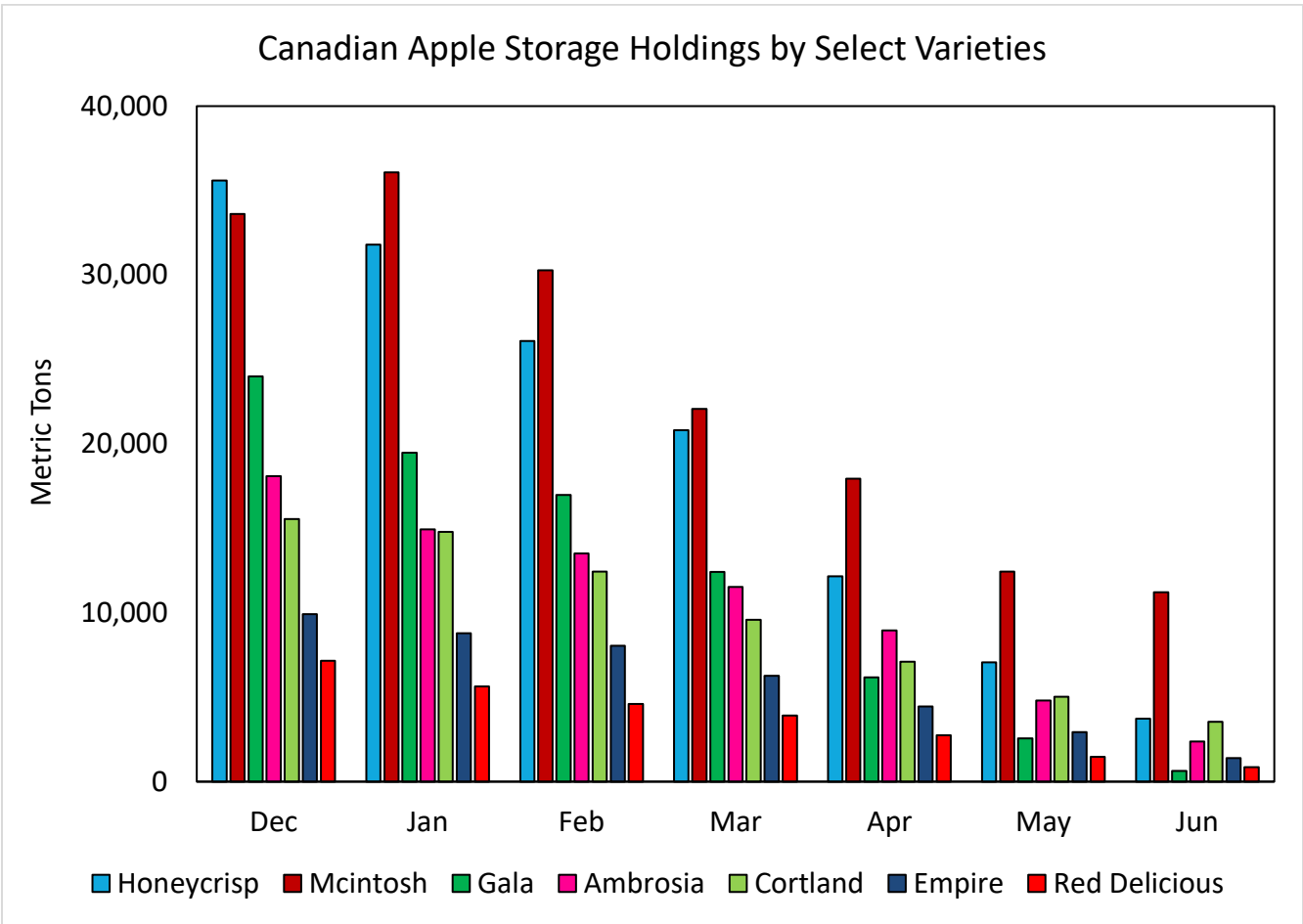
Ontario continues as the largest apple producing province in Canada. A record Quebec apple crop in MY 2024/25 eroded some of Ontario's market share of total Canadian production but the province continues to produce close to 50 percent of the country's apples. Consolidation continues to occur in Ontario orchards and high-density plantings are favored during replant for the generation of higher yields per acre. Gala and Honeycrisp varieties now dominate in Ontario production while acreage of McIntosh and Red Delicious varieties continues to decline as producers replace older orchards with varieties that are more in demand with today's consumer. Growers are also chasing more premium varieties, looking for higher profit margins as cost of growing continues to rise. Despite drought and heat challenges in certain growing regions, there was optimism during the harvest that the Ontario apple crop will be strong. Fruit size may be smaller in some regions due to this, and harvest was reported as starting early as well. There are concerns about wholesale pricing given the estimated size of the U.S. apple crop and growers will likely face competition from lower priced imports. Ontario will continue to focus on moving the majority of fresh production into domestic markets and leaning into "Buy Local" and "Buy Canadian" sentiment.

Early estimates showed a strong Quebec apple crop once again for MY 2025/26. However, dry conditions during the latter portion of the growing season will likely see final production volumes come in below those earlier estimates. While MY 2024/25 was a record for Quebec production, achieving a new record in MY 2025/26 will likely not occur. The province will remain firmly in second position for apple production behind Ontario. As is the trend in Ontario, Quebec producers continue to look for opportunities to modernize their acreage and increase plantings of consumer preferred varieties such as Ambrosia, Honeycrisp, and Gala. Quebec has the largest McIntosh acreage in Canada, a variety which is no longer popular with consumers for fresh consumption, and phase outs of these orchards should continue with replacement to more popular and in-demand varieties.

New Brunswick and Nova Scotia apple production will be significantly impacted from drought and heat in MY 2025/26. Dry conditions and high temperatures will see production lowered with fewer apples and smaller sizing contributing to the decline. Nova Scotian growers have invested in Honeycrisp acreage and that variety has been reported as being particularly impacted, with sizing down. Quality on harvested apples, however, is reportedly good and similar to other Eastern provinces, harvest was wrapping earlier than usual. There is also concern about forward impacts from the drought into next year's production cycle given the stress the trees have experienced.

British Columbia production is anticipated to be below MY 2024/25 levels at final harvest volumes, with Ambrosia particularly impacted by later season weather events. Regionally, hail damage has impacted some B.C. acres and there are also concerns about quality impacts. Growers in British Columbia continue to weather the fallout of the closure of the BC Tree Fruits Cooperative. Access to controlled atmosphere storage continues to be limited in supply. A large Washington apple crop is also going to pressure the B.C. market and apple pricing.

Figure 2. Canadian apple storage holdings by select varieties for MY 2024/25.



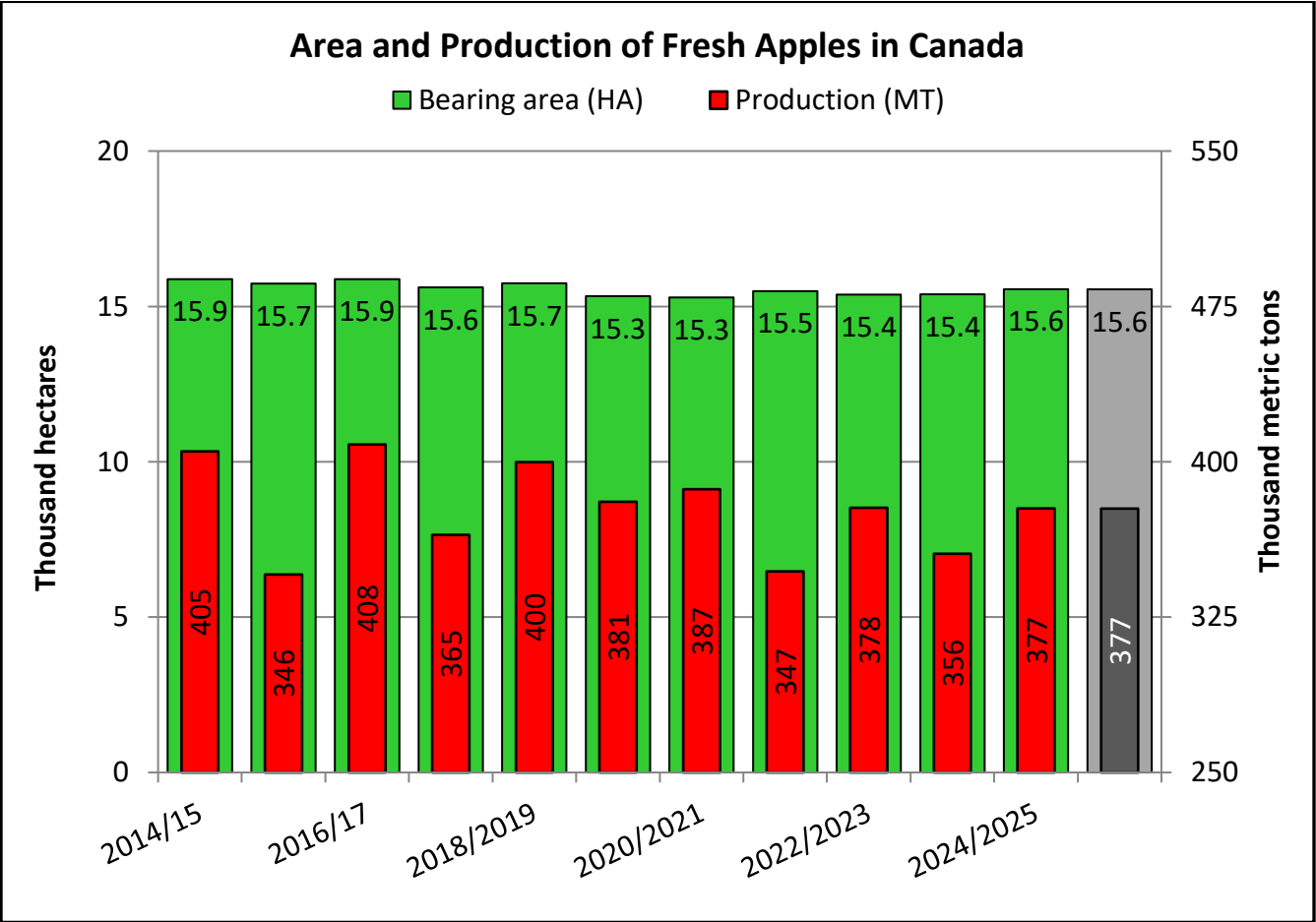
Source: Infohort, Agriculture and Agri-Food Canada

FAS/Ottawa forecasts acreage to see a slight increase in MY 2025/26 on some new acreage added in British Columbia. Acreage in B.C. has been in a multi-year decline, however, provincial replant programming has reportedly had a positive impact in that some new acreage is going in. B.C. has experienced several challenging weather events in recent years, and the province and fruit industry continue to explore which commodities and varieties are best positioned to evolve with the ongoing extreme weather challenges. B.C. acreage will, however, continue to be constrained by the high cost of land and rising costs of production. These factors become a greater challenge for growers when coupled with the significant production in Washington and lower production costs for Washington growers. Ontario and Quebec will continue to shift their acreage to retire older varieties in favor of those demanded by today’s consumer.

Labor availability continues to be a challenge for industry and Canadian consumers continue to raise concerns over a rising cost of living, including inflation in food outpacing general inflation. Retailers

and growers are facing pressure to keep costs low for consumers but amidst higher growing costs, growers will either need to find ways to improve efficiency or potentially face lower earnings against these costs of production increases.

Figure 3. Area (hectares) and production (metric tons) of fresh apples in Canada.



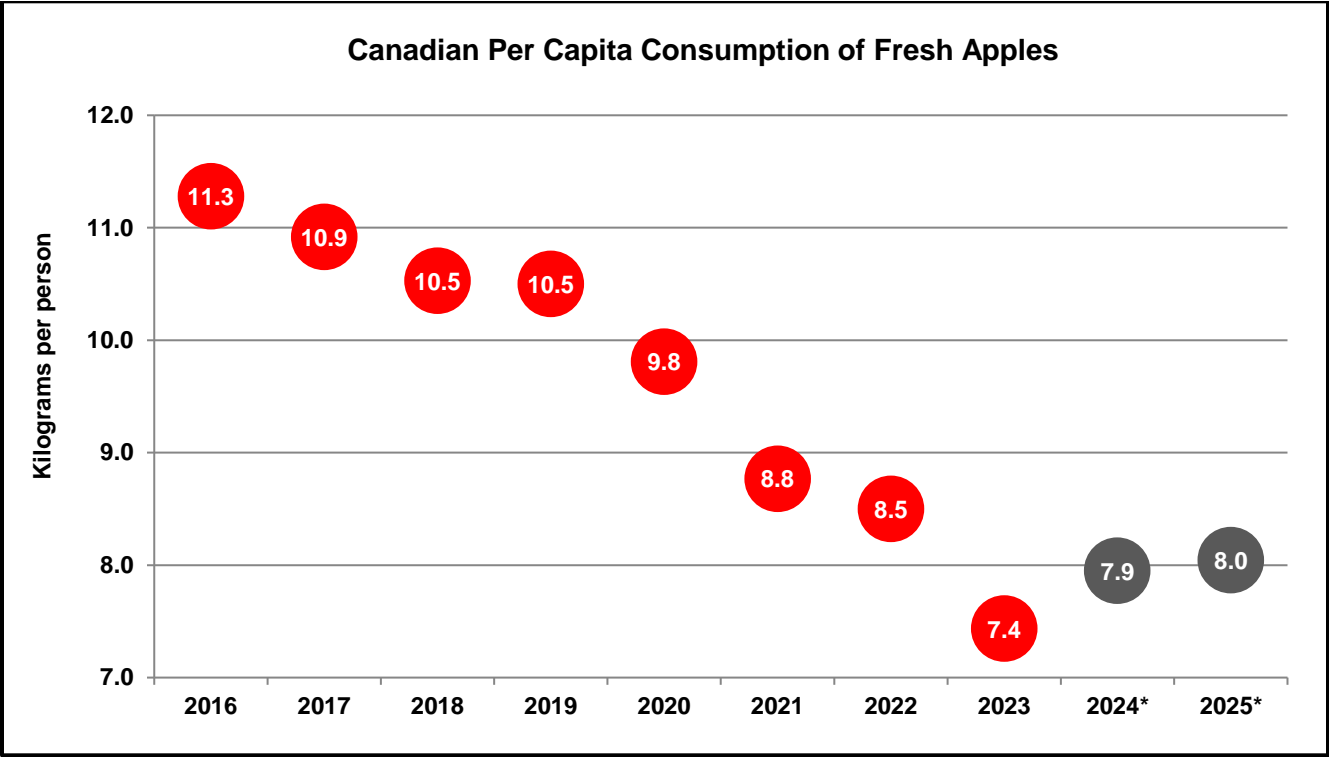
Source: Statistics Canada / *FAS/Ottawa forecast

Consumption:

FAS/Ottawa forecasts one percent growth in domestic consumption for MY 2025/26. A larger domestic apple crop in MY 2024/25 and increased imports saw Canadian per capita consumption of apples reverse a long-term trend of declining consumption. FAS/Ottawa forecasts that per capita consumption will continue to be supported in MY 2025/26. While domestic production is forecast to see a slight decline, a larger U.S. apple crop is anticipated to see growth in imports and lower prices. Apples continue to face competition in the fresh produce aisle by berries and tropical fruits, however, rising cost

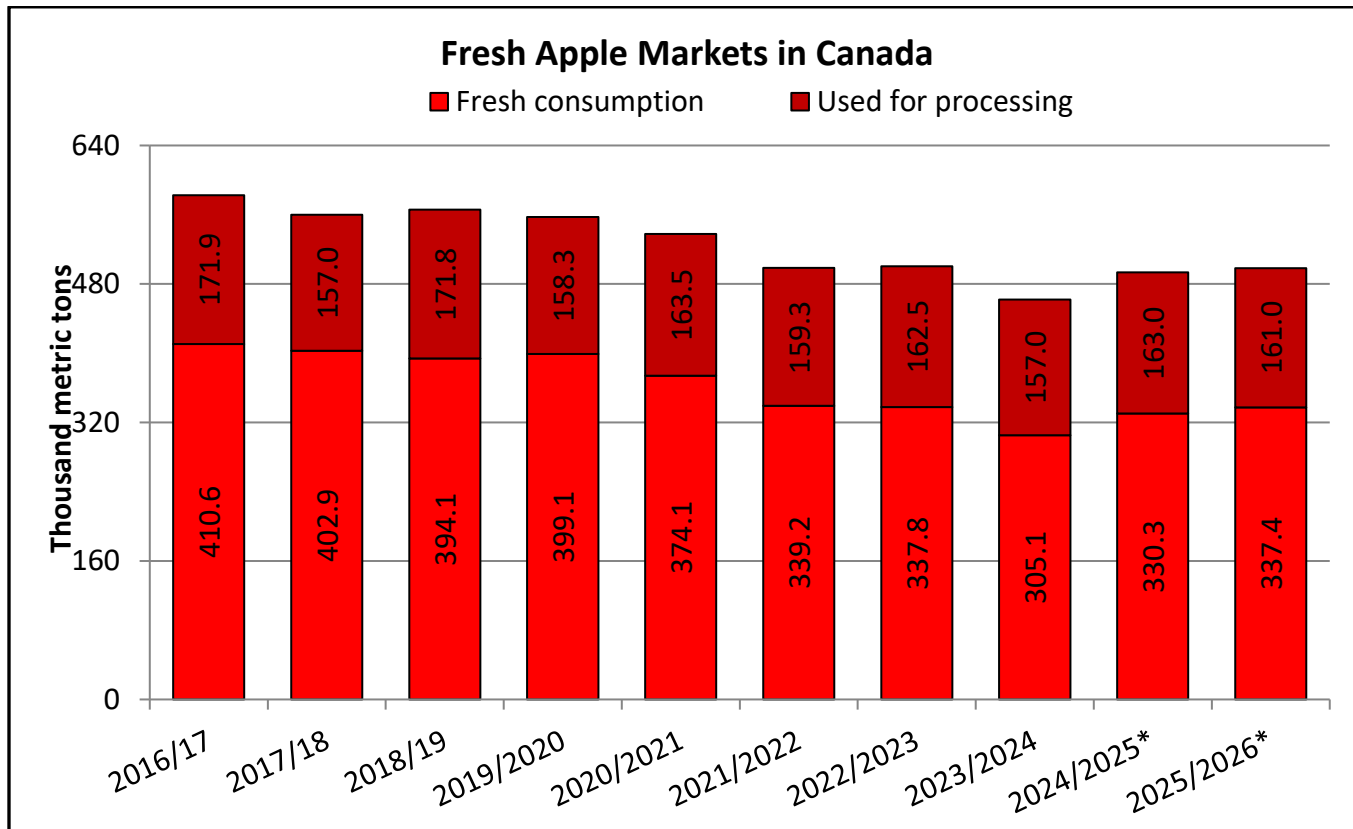
of living and recession fears will likely see consumers becoming increasingly price sensitive in MY 2025/26. Although retail apple pricing does not necessarily reflect the lowering wholesale prices, consumers are likely to see value in apples in terms of satiety per unit price as well as storability and consequent reduction in product loss/waste post-purchase.

Figure 4. Evolution of Canadian per capita consumption of fresh apples.



Source: Statistics Canada / *FAS/Ottawa forecast

Figure 5. Volume of fresh apples destined for fresh consumption and for further processing in Canada.



Source: Statistics Canada / *FAS/Ottawa forecast

Trade:

With a strengthened demand for apples, FAS/Ottawa forecasts a four percent growth in imports for MY 2025/26. This growth in imports will also be driven by a large U.S. apple crop. While ongoing constraints to the Canada-U.S. relationship persists, it does not appear that Canadian consumers have taken a significant stance against U.S. apples. Repeated polling in Canada does continue to show that consumers report maintaining an inclination towards avoiding U.S. product in the grocery store, however, apples are not necessarily in the crosshairs. Additionally, concerns about cost of living will continue to drive consumption patterns and a large U.S. crop is likely to see lower wholesale and retail prices. Unless a strong consumer sentiment in opposition to U.S. apples materializes, Canadian retailers are likely to take advantage of the large U.S. apple crop when sourcing and imports will be supported as a result. Retailers are still likely to dabble at diversifying their supply chain and this will see support for imports from alternative source markets such as New Zealand and Chile. Canada also approved market access for Ukrainian apples in March 2025 with the first shipments reported to begin arriving in Fall 2025. Australia is also the beneficiary of a September 2025 market access announcement, with Canada

approving a request for fresh apples from Australian to no longer require fumigation or cold treatment to be eligible for export to Canada.

Canada continues to have limited processing capacity, and the bulk of imports will continue to be for the fresh market in MY 2025/26.

Table 2. Imports of fresh apples into Canada by volume.

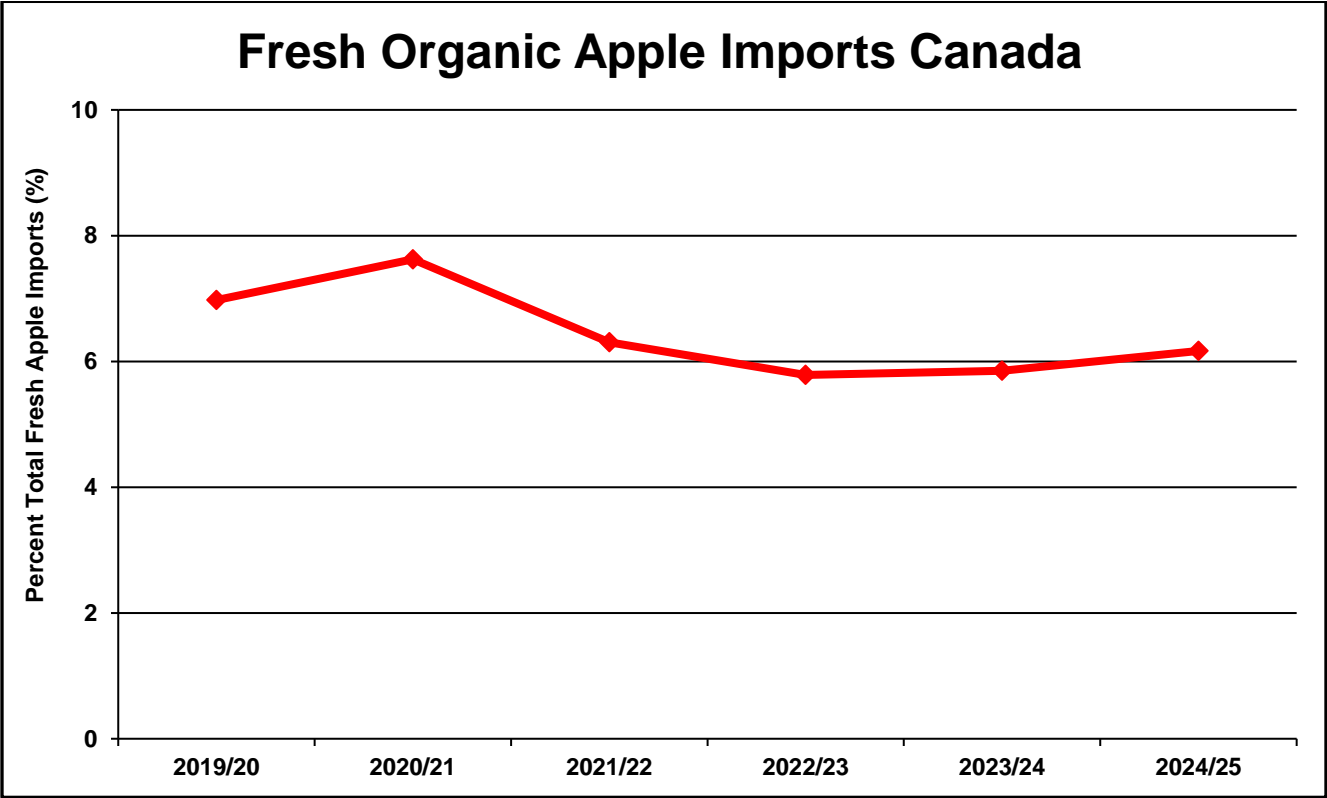
Canada: Imports of fresh apples						
Marketing year: July-June / Quantity in metric tons						
	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
World	204,893	190,354	205,865	184,906	163,871	168,732
for processing	68,689	66,450	73,890	58,796	37,756	41,954
organic	14,297	14,513	12,977	10,697	9,592	10,406
other	121,909	109,390	118,997	115,409	116,520	116,373
United States	171,092	157,376	171,998	149,979	140,182	137,023
for processing	65,661	64,648	72,465	57,458	36,656	34,737
organic	12,938	12,730	11,150	9,739	9,056	9,715
other	92,495	79,997	88,383	82,780	94,469	92,570
Chile	15,359	14,469	15,870	12,715	6,993	8,232
European Union	3,865	4,881	2,521	3,722	677	1,420
Italy	3,577	4,643	1,702	3,451	471	1,260
New Zealand	8,464	5,553	7,734	9,501	8,696	8,686
China	2,458	2,839	1,683	1,901	2,397	2,704
All other countries	3,943	5,474	6,878	7,359	5,132	10,827
Import Market Shares						
United States	83.5%	82.7%	83.5%	81.1%	85.5%	81.2%
Chile	7.5%	7.6%	7.7%	6.9%	4.3%	4.9%
European Union	1.9%	2.6%	1.2%	2.0%	0.4%	0.8%
Italy	1.7%	2.4%	0.8%	1.9%	0.3%	0.7%
New Zealand	4.1%	2.9%	3.8%	5.1%	5.3%	5.1%
China	1.2%	1.5%	0.8%	1.0%	1.5%	1.6%

Source: Trade Data Monitor

Note: Tariff lines for organic apples were introduced on January 1, 2007

Imports of organic apples remain a small percentage of overall apple imports. While imports of organic apples as a percentage of overall apple imports have dropped off from an MY 2020/21 peak, organic imports saw a slight bump in both volume imported and as a percent of imports in MY 2024/25. The United States continues to be the overwhelmingly dominant source market for imports of organic apples. Pricing will be a challenge with price sensitive consumers in MY 2025/26 but if the larger crop sees competitive organic pricing, this will support market stability for organic imports in MY 2025/26.

Figure 6. Imports of fresh organic apples into Canada as a percent of overall imports by volume.



Source: Trade Data Monitor.

Canadian exports of fresh apples as a percent of production had strong performance from 2021 through 2024. However, despite a larger domestic crop in MY 2024/25, Canadian apple exports dropped off both in volume and as a percent of production. Improved domestic demand was a driver along with a reduction in exports of processing apples. Apple exports for non-processing purposes increased in MY 2024/25. Canada has limited apple processing capacity meaning that in years with more quality challenges, Canada has more processing apples available for export. A good quality MY 2024/25 meant fewer apples destined for processing. With reports of quality challenges for MY 2025/26, FAS/Ottawa anticipates that there will be a larger volume of apples available to export for processing end uses.

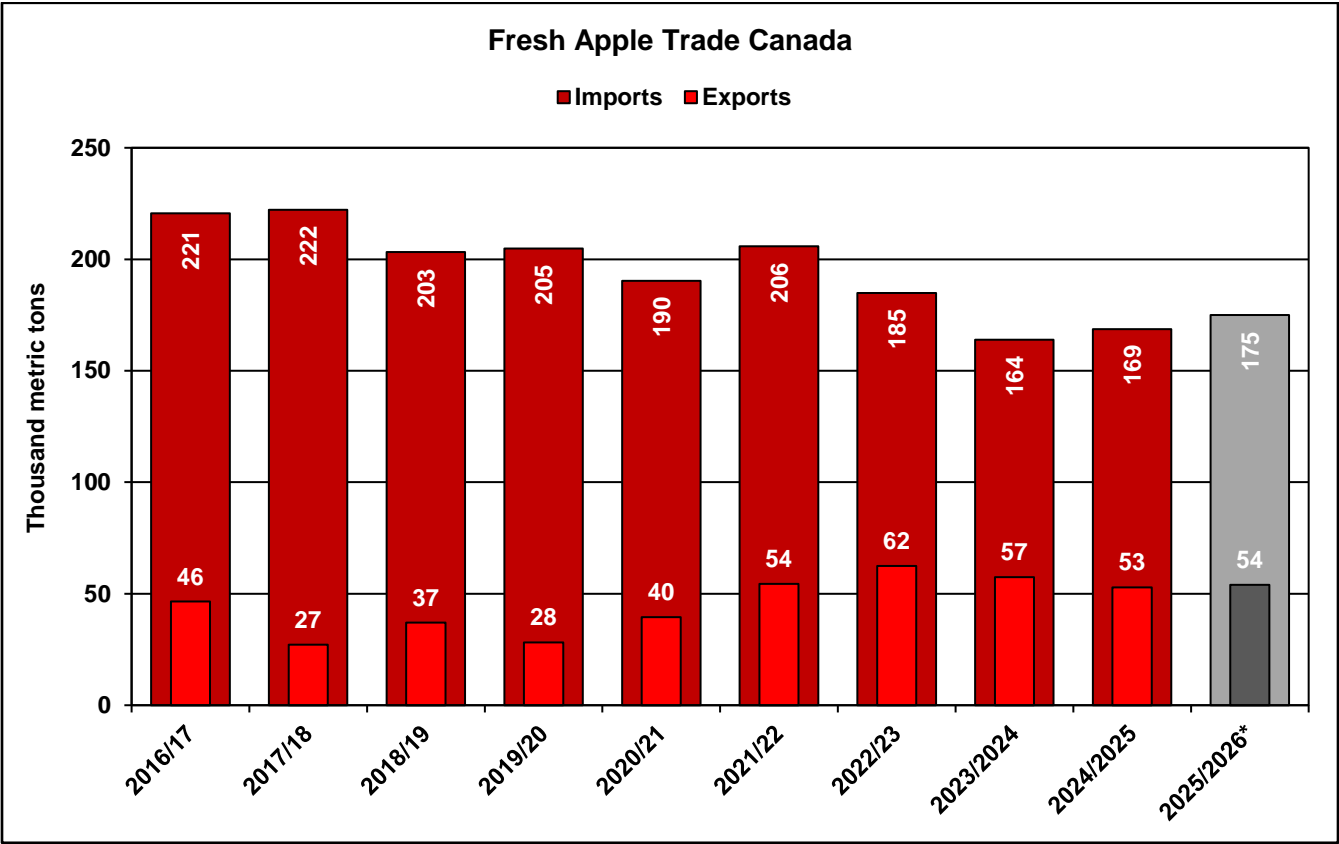
Coupled with production forecasts relatively stable on MY 2024/25, FAS/Ottawa is forecasting a two percent growth in exports, driven by larger volumes for the processing market. Canada has been actively pursuing export diversification strategies for many years but with renewed gusto in 2025 as a result of a tenuous Canada-U.S. relationship. Canada and Mexico have reportedly held talks to open Mexico market access for Eastern Canada apples. Canada will continue to target Indo-Pacific markets, like Vietnam and South Korea, as tariff elimination has been achieved, through free trade deals for certain markets. While Canada will look to explore diversified trade options, the geographic proximity of the United States will see it remain the dominant market for Canadian exports, however, volumes will be challenged by the large U.S. apple crop.

Table 3. Exports of fresh apples from Canada by volume.

Canada: Exports of fresh apples						
<i>Marketing year: July-June / Quantity in metric tons</i>						
	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
World	28,177	39,536	54,475	62,405	57,426	52,907
for processing	12,732	19,001	34,404	38,341	37,691	22,129
other	15,445	20,534	20,071	24,064	19,735	30,778
United States	14,802	20,887	21,548	24,771	22,430	30,714
for processing	4,420	5,118	5,156	4,548	6,464	4,307
other	10,382	15,770	16,392	20,223	15,967	26,407
Vietnam	9,608	8,645	23,365	31,692	27,058	18,536
India	0	2,702	4,198	1,170	604	236
Cuba	975	1,564	1,210	646	1,148	841
All other countries	2,792	8,440	8,352	5,296	6,790	2,816

Source: Trade Data Monitor

Figure 7. Canadian trade in fresh apples by volume.



Source: Trade Data Monitor/ *FAS/Ottawa forecast

PEARS

Table 4. Production, Supply, and Distribution of fresh pears.

NOTE: "NEW FAS/Ottawa" data reflects FAS/Ottawa's assessments and are NOT official USDA data

PEARS Fresh Canada	2023/2024		2024/2025		2025/2026*	
	Marketing Year: July-June					
	USDA Official	NEW FAS/Ottawa Data	USDA Official	NEW FAS/Ottawa Data	USDA Official	NEW FAS/Ottawa Estimates
Production	9,199	9,296	8,400	8,766	0	8,800
Imports	58,600	58,626	58,000	51,693	0	60,000
Total Supply	67,799	67,922	66,400	60,459	0	68,800
Domestic Consumption	67,499	67,652	66,000	60,225	0	68,570
Exports	300	270	400	234	0	230
Total Distribution	67,799	67,922	66,400	60,459	0	68,800

*Data in hectares or metric tons / *FAS/Ottawa forecast*

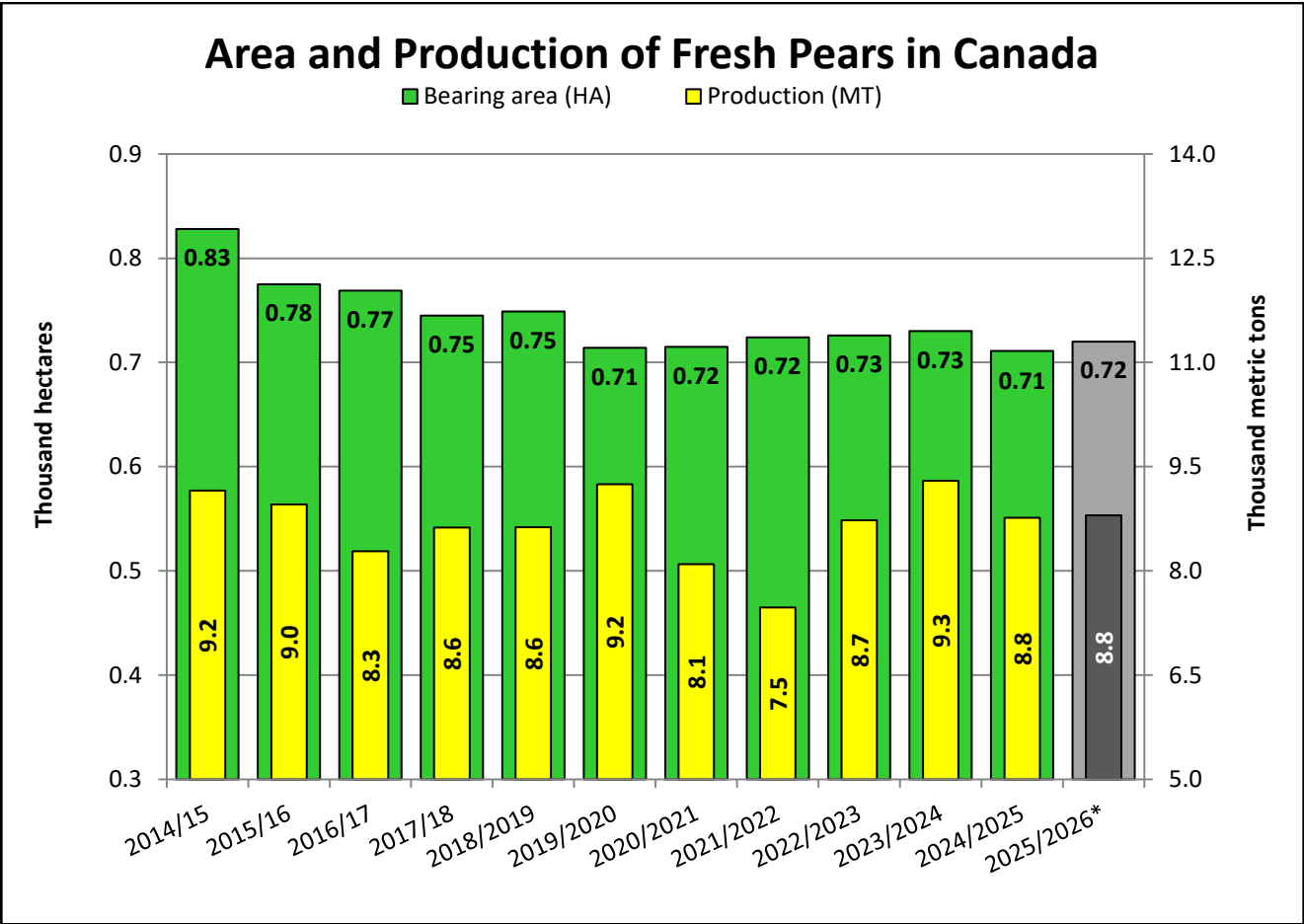
Production:

FAS/Ottawa forecasts Canadian pear production to be up in MY 2025/26. Pear production in British Columbia is forecast to see an average production year following significant losses due to extreme cold in MY 2024/25; production fell 21 percent year-over-year. For MY 2025/26, Ontario and Quebec pear crops were impacted by drought and heat. This will see lower production volumes compared to MY 2024/25. Recovery of the British Columbia crop will be welcome news as the province is historically the main Canadian pear producing province. However, a large U.S. pear crop has created some marketing

challenges for the Canadian crop with prices pressured lower on large volumes available from the United States.

FAS/Ottawa forecasts that Canadian acreage will continue to remain relatively stable for MY 2025/26. Acreage changes are mostly reflective as shifts in variety acreage. Ontario continues to reduce Bosc acreage, replacing those acres with varieties resistant to fire blight. Trialing continues with Happi Pear®, which could see expanded acres if consumer demand continues to trend positively. Canadian production continues to remain relatively small, and production is predominately marketed fresh to local markets and interprovincially. There is very limited pear processing capacity in Canada.

Figure 8. Area (hectares) and production (metric tons) of fresh pears in Canada.

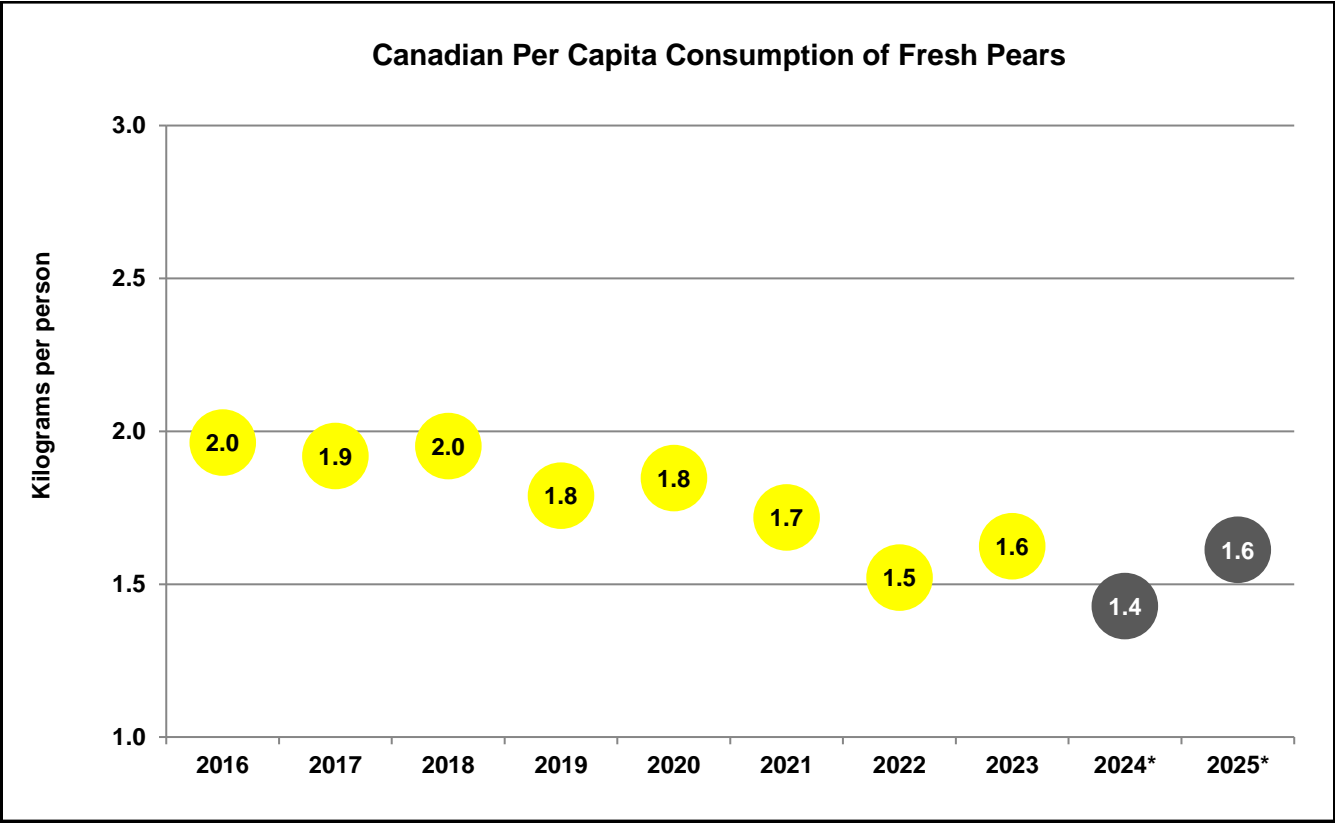


Source: Statistics Canada / *FAS/Ottawa forecast

Consumption:

FAS/Ottawa forecasts a rise in domestic consumption for MY 2025/26, both in terms of total consumption and per capita consumption. Improved domestic availability in MY 2025/26 and a larger U.S. pear crop will see consumption bounce back from the lower level observed in MY 2024/25 as a result of reduced pear availability in both Canada and the United States. Canada’s consumption of fresh pears is highly dependent on imports to supplement low domestically grown volumes. Approximately 90 percent of Canadian consumption of fresh pears is satisfied through imports, with most imports from the United States. Even with efforts to see more trade diversification, availability of pears in Canada is still strongly linked to U.S. availability. Greater U.S. pear availability in MY 2025/26 should see increased Canadian consumption. A larger U.S. crop will also see lower pricing, which also should spur consumption to recover from MY 2024/25.

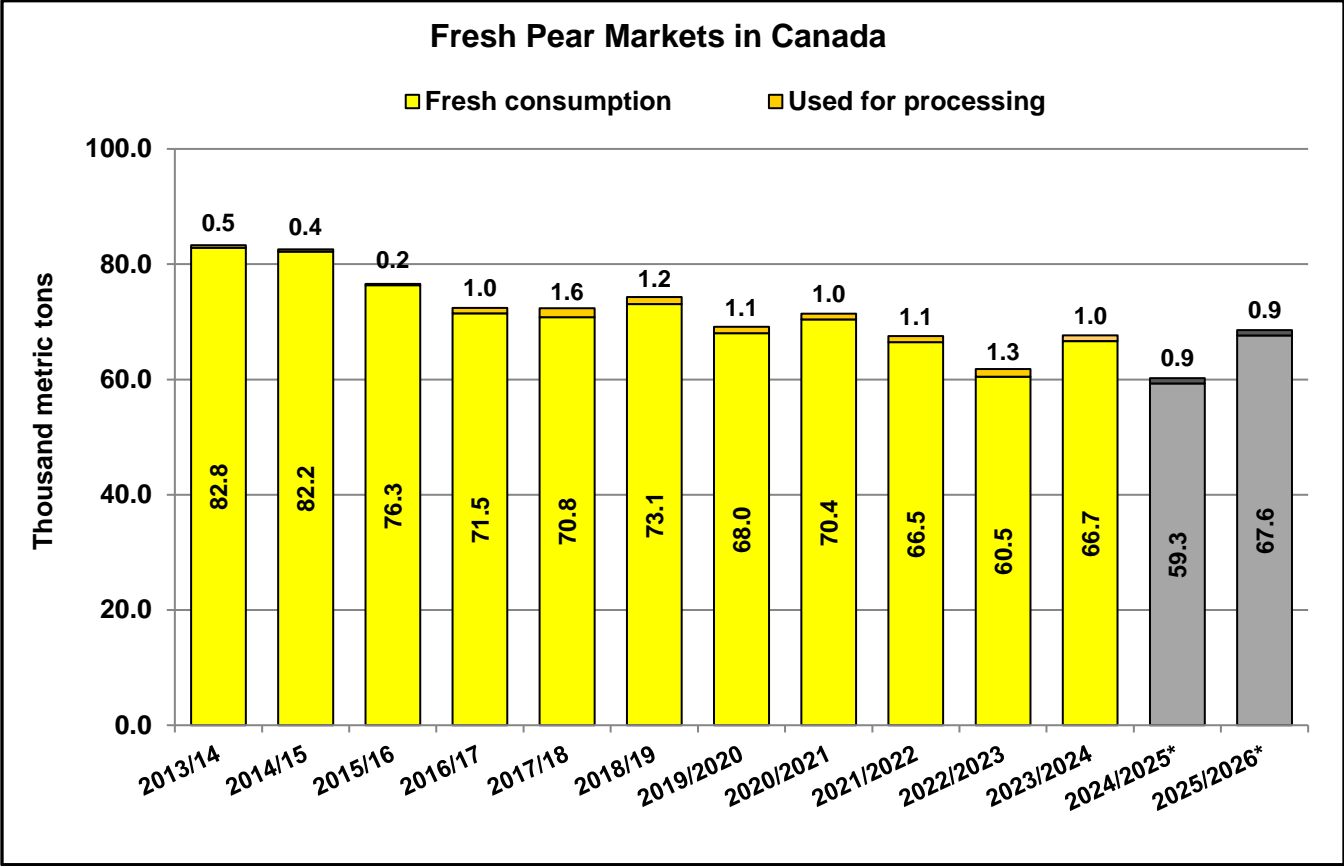
Figure 9. Evolution of Canadian per capita consumption of fresh pears.



Source: Statistics Canada / *FAS/Ottawa forecast

Fresh consumption continues to be the main market for pears in Canada. There is limited processing within Canada and niche cidery operations would mainly use local crop in their production. Ontario and Quebec sizing will be smaller in MY 2025/26 due to drought conditions, which will see fewer large size pears marketed.

Figure 10. Volume of fresh pears destined for fresh consumption and for further processing in Canada.



Source: Statistics Canada / *FAS/Ottawa forecast

Trade:

FAS/Ottawa forecasts fresh pear imports will increase substantially in MY 2025/26, following the lower import volume observed in MY 2024/25. A larger U.S. pear crop will see larger import volumes from the United States. While still the dominant supplier in MY 2024/25, U.S. exports of fresh pears to Canada declined on the smaller U.S. pear crop. Consequently, the U.S. market share reached a substantial low in MY 2024/25 as import volumes from China and South Africa jumped to fill in the

gaps left from smaller U.S. volumes. Typically, the United States supplies over 40 percent of Canada's fresh pear imports.

Canada continues to advocate for trade diversification amidst ongoing tensions in the Canada-United States relationship. While the market opportunities presented by a smaller U.S. pear crop in MY 2024/25 could see imports from other countries continue to try and chip away at U.S. market share, the large U.S. crop and attractive pricing will see demand for U.S. pears in Canada for MY 2025/26. Canadian consumers have growing concerns about rising cost of living and grocery bills and while sentiment to avoid American products continues, this sentiment has not materialized as strongly for pears. In 2024, prior to the shift in the Canada-United States relationship, a survey of Ontario consumers showed that consumer purchase decisions on pears are driven primarily based on fruit ripeness. Origin is of less importance to the consumer. The close proximity of the United States, familiarity with the product, and a consumer likely to be less discerning on reading origin labels when purchasing pears will all support U.S. market share recovery in MY 2025/26 despite ongoing tensions.

Table 5. Imports of fresh pears into Canada by volume.

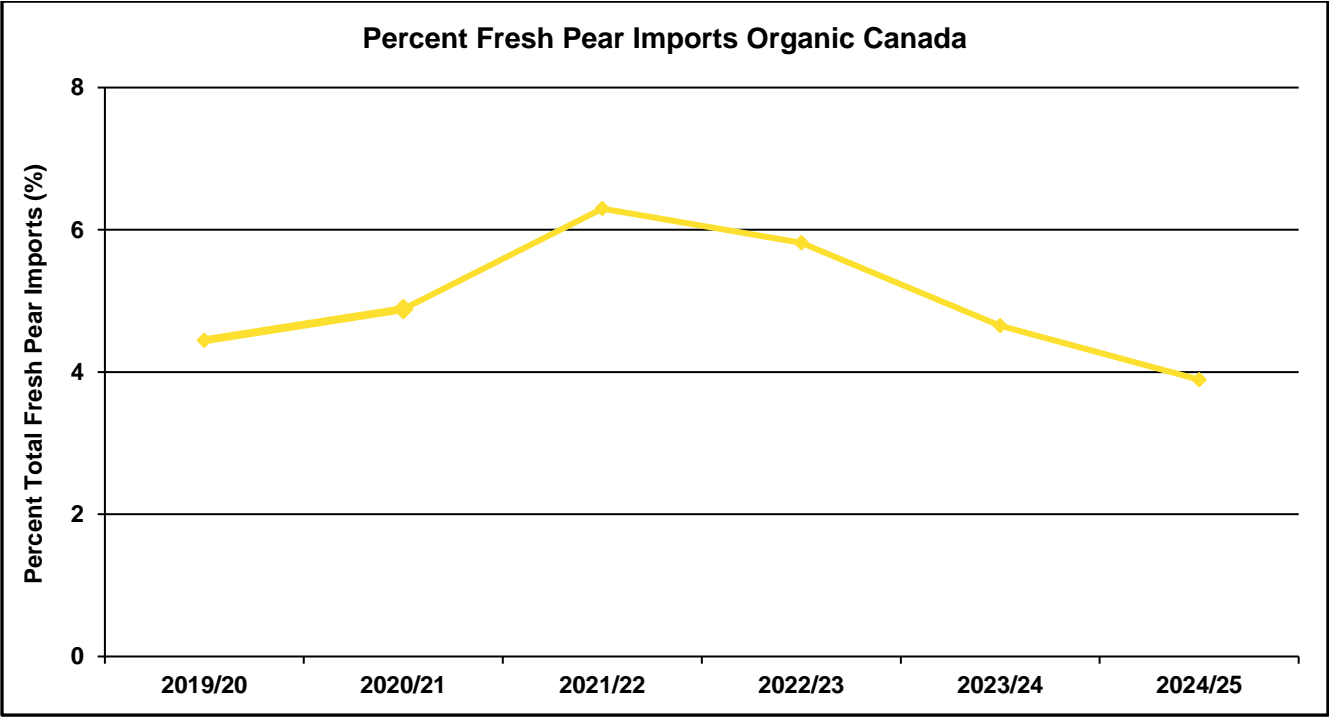
Canada: Imports of fresh pears						
Marketing year: July-June / Quantity in metric tons						
	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
World	60,305	63,491	60,313	53,164	58,626	51,693
for processing	211	126	448	820	252	344
organic	2,681	3,101	3,798	3,093	2,728	2,012
other	57,412	60,263	56,067	49,251	55,647	49,338
United States	28,972	30,217	30,830	24,531	27,841	17,256
for processing	211	126	435	820	252	344
organic	1,266	1,671	1,762	1,431	1,225	1,153
other	27,495	28,420	28,633	22,281	26,365	15,760
Argentina	10,500	11,974	11,005	10,806	9,716	9,675
China	11,341	9,897	8,243	8,638	10,426	11,682
South Africa	4,592	6,521	6,219	6,275	7,136	8,121
European Union	2,753	2,757	2,284	1,598	1,570	2,511
Portugal	2,350	2,094	2,085	1,392	1,463	2,275
All other countries	2,550	2,788	1,931	1,522	2,044	2,684
Import Market Shares						
United States	48.0%	47.6%	51.1%	46.1%	47.5%	33.4%
Argentina	17.4%	18.9%	18.2%	20.3%	16.6%	18.7%
China	18.8%	15.6%	13.7%	16.2%	17.8%	22.6%
South Africa	7.6%	10.3%	10.3%	11.8%	12.2%	15.7%
European Union	4.6%	4.3%	3.8%	3.0%	2.7%	4.9%
Portugal	3.9%	3.3%	3.5%	2.6%	2.5%	4.4%

Source: Trade Data Monitor

Note: Tariff lines for organic pears were introduced on January 1, 2007

Imports of fresh organic pears have continued to fall since their high of MY 2021/22. As consumers continue to be highly price sensitive, this trend is unlikely to change for MY 2025/26.

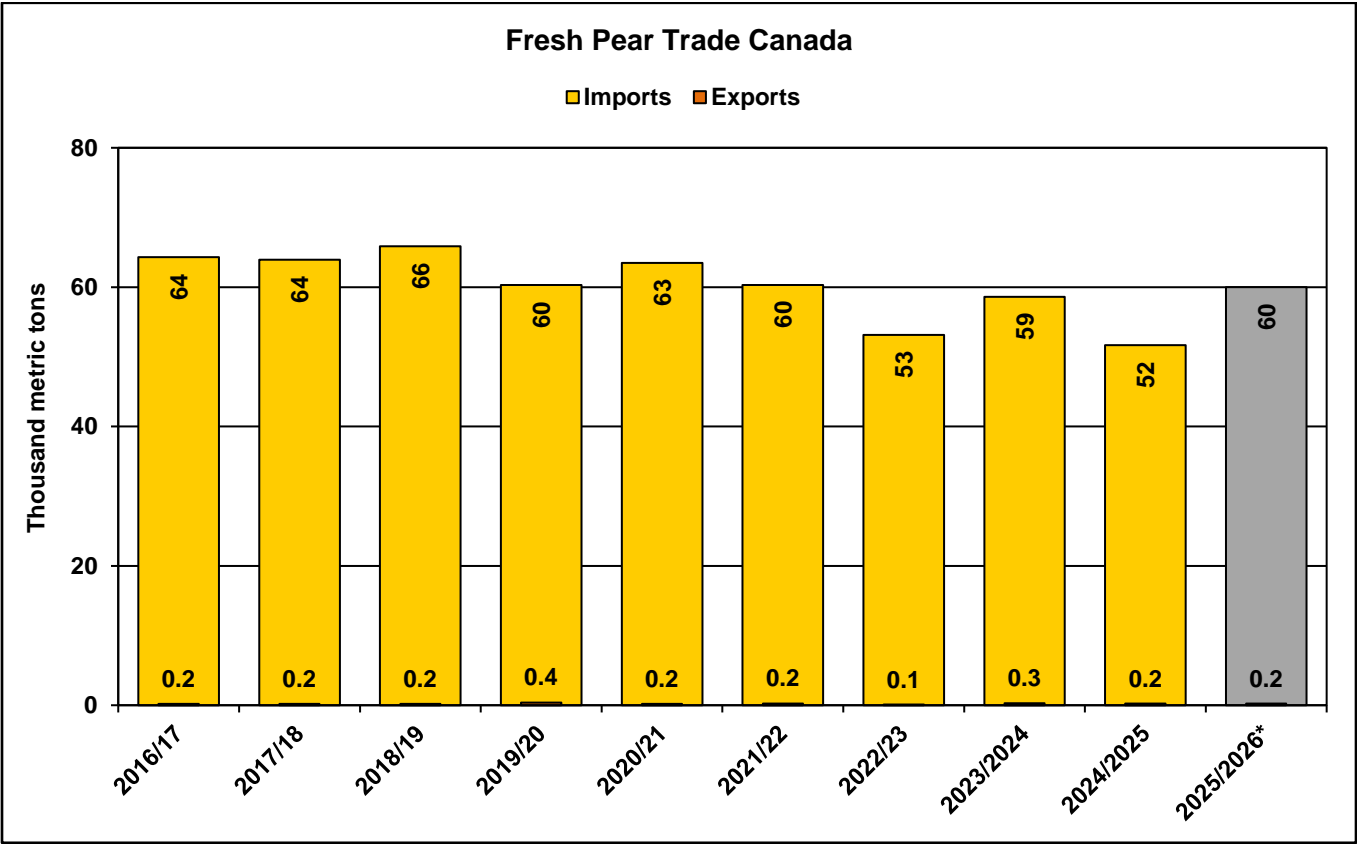
Figure 11. Imports of fresh organic pears into Canada as a percent of overall imports by volume.



Source: Trade Data Monitor

Canadian exports of fresh pears remain negligible against imports given Canada’s small production. Canadian exports continue to remain less than one percent of fresh pear imports by volume. While Canadian supply will be more ample for MY 2025/26 relative to MY 2024/25, export volumes are not anticipated to increase given the large U.S. crop.

Figure 12. Canadian trade in fresh pears by volume.



Source: Trade Data Monitor/ *FAS/Ottawa forecast

FRESH TABLE GRAPES

Table 6. Production, Supply, and Distribution of fresh grapes.

NOTE: "NEW FAS/Ottawa" data reflects FAS/Ottawa's assessments and are NOT official USDA data

GRAPES Fresh Canada	2023/2024		2024/2025		2025/2026*	
	Marketing Year: June-May					
	USDA Official	NEW FAS/Ottawa Data	USDA Official	NEW FAS/Ottawa Data	USDA Official	NEW FAS/Ottawa Estimates
Production	2,201	2,467	1,850	1,191	0	2,200
Imports	176,000	176,575	190,000	204,634	0	198,000
Total Supply	178,201	179,042	191,850	205,825	0	200,200
Domestic Consumption	178,201	179,042	191,850	205,825	0	200,200
Exports	0	0	0	0	0	0
Total Distribution	178,201	179,042	191,850	205,825	0	200,200

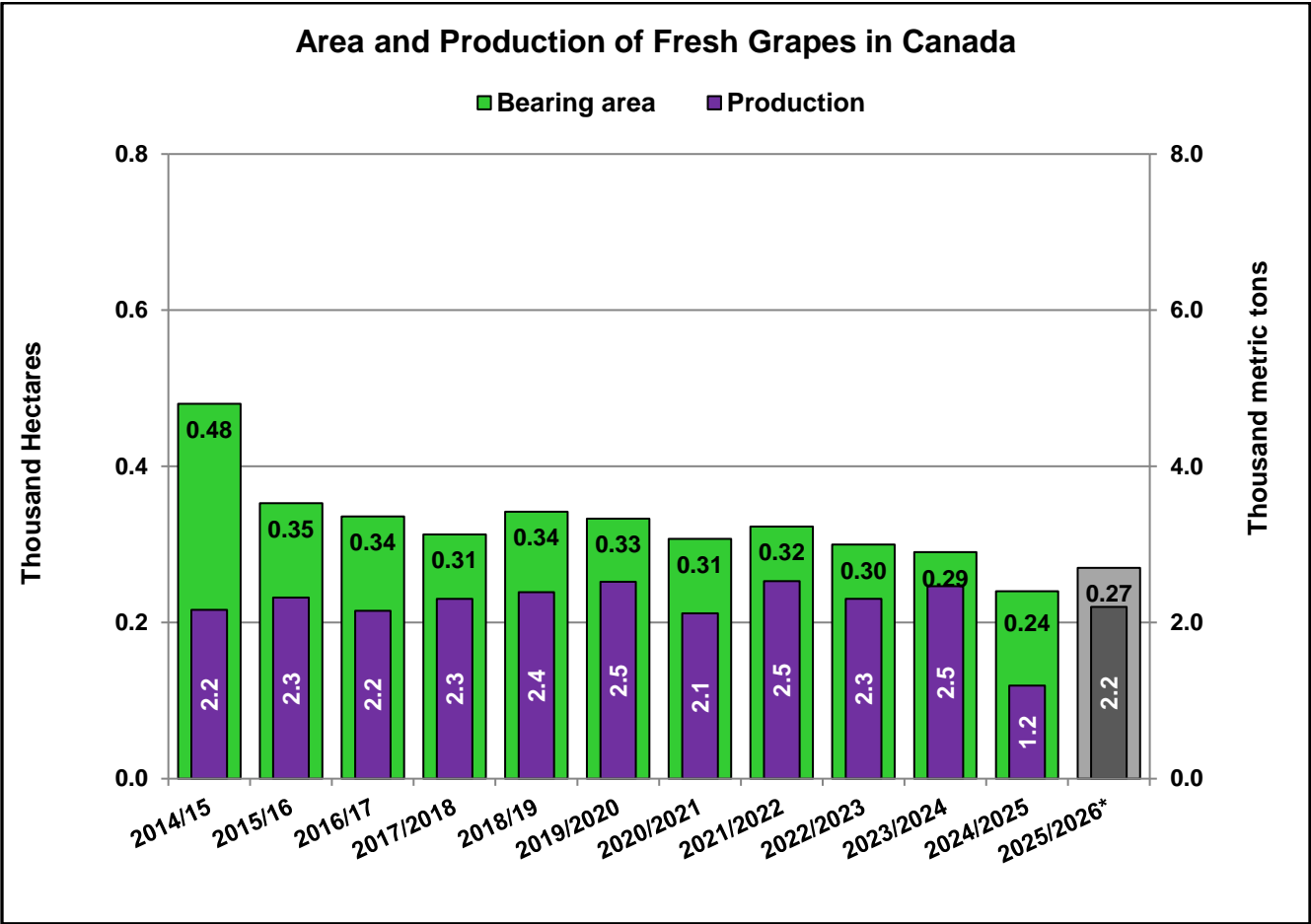
*Data in metric tons / *FAS/Ottawa forecast*

Production:

The majority of grape acreage and production in Canada is dedicated to the production of wine grapes, while table grapes comprise less than five percent of total Canadian grape production.

FAS/Ottawa forecasts recovery of Canadian table grape production for MY 2025/26. In MY 2024/25, adverse weather events impacted both Ontario and British Columbia. A significant extreme cold event in 2024 decimated the grape crop, especially wine grapes, in British Columbia. While there are still lingering impacts from that event, production has recovered to some extent in MY 2025/26, however, the crop will still be below average. In MY 2025/26, the Ontario grape crop has been impacted by drought conditions. Most table grape acreage is not irrigated in Ontario and as a result, production will be down year-over-year and is estimated to be ten percent below the five-year average; five-year average for Ontario is 2,207 MT based on data from Statistics Canada for labrusca grapes. Ontario is the largest table grape producing province and while production will be down, the production recovery of the B.C. crop will see the overall Canadian production up in MY 2025/26.

Figure 13. Area (hectares) and production (metric tons) of fresh grapes in Canada.



Source: Statistics Canada / *FAS/Ottawa forecast

Wine grapes continue to dominate Canadian grape acreage and cultivation. While Ontario continues to trial new varieties to appeal to changing consumer preferences, acreage is anticipated to remain steady for MY 2025/26. Overall, FAS/Ottawa forecasts an acreage decline once again in MY 2025/26, with acreage damaged by 2024 weather events remaining out of production and re-planting ongoing.

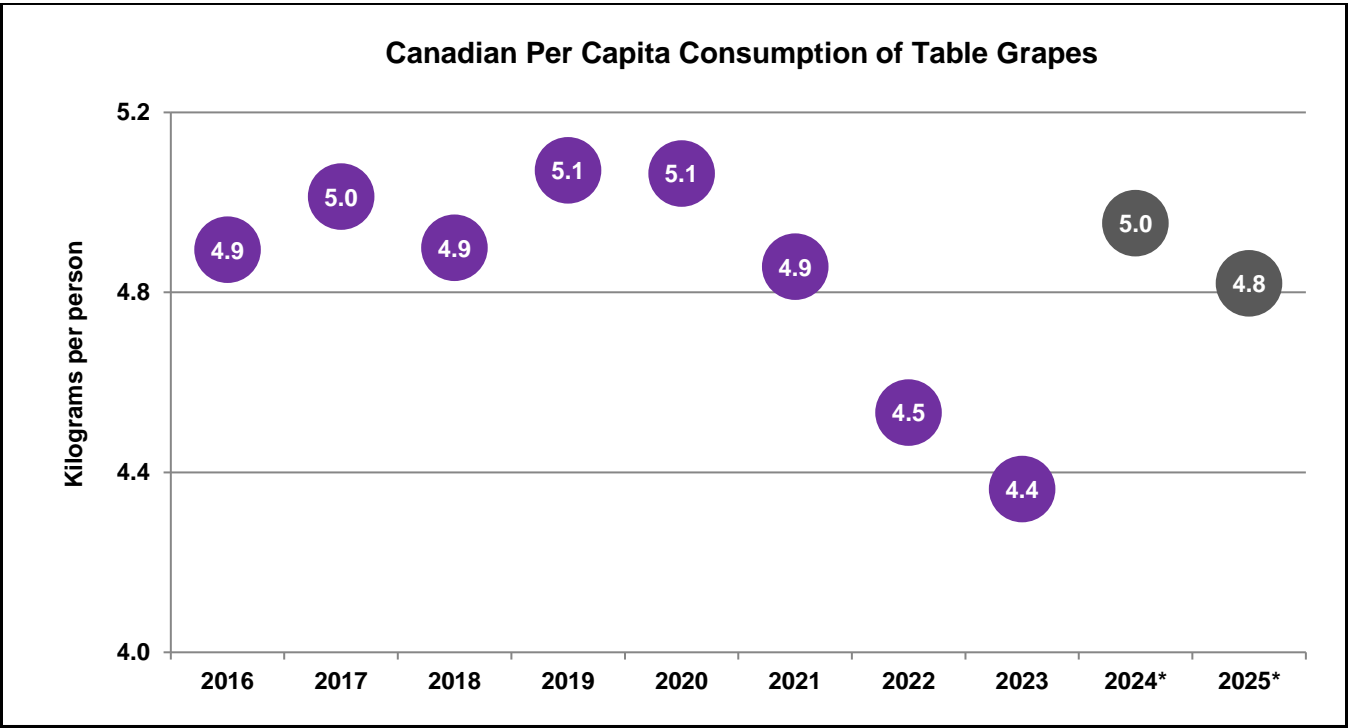
Consumption:

FAS/Ottawa forecasts domestic consumption to drop off the increase observed in MY 2024/25, but Canadian consumption is still forecast to remain above MY 2022/23 and MY 2023/24 on sustained import demand. As with other fruit commodities, table grapes face substantial competition in the fresh produce aisle. Canadian consumers are also growing evermore concerned with the rising cost of living and recession fears, which will likely see consumers becoming increasingly price sensitive in MY 2025/26. Table grapes are often less competitively priced against fruits such as apples and pears, although their lower price point relative to berries will see sustained consumer demand for MY 2025/26.

A forecast increase in U.S. grape production for MY 2025/26 should also support availability for import and keep pricing more palatable for consumers.

Imports are critical to support Canadian table grape consumption given the limited domestic production. Over 98 percent of Canadian consumption is typically supplied through imports due to the limited domestic production and availability across Canada. Canadian production tends to be consumed locally, although Ontario does ship a large quantity of grapes to Quebec where there is more consumer demand, and more households make their own fresh jams and jellies.

Figure 14. Evolution of Canadian per capita consumption of fresh grapes.



Source: Statistics Canada / *FAS/Ottawa forecast

Trade:

FAS/Ottawa forecasts a decline in fresh grape imports for MY 2025/26 after strong import activity driven by fresh grapes for wine making in MY 2024/25. While weather impacts during the 2025 growing season and lingering effects from the extreme cold event in British Columbia in 2024 have impacted MY 2025/26 production, production is anticipated to recover somewhat meaning a larger domestic supply will be available. However, imports will still remain strong due to a constrained

domestic supply. Canadian production is minimal compared to consumer demand meaning that substantial import volumes are required relative to domestic production to meet domestic demand.

MY 2024/25 saw a recovery in import volumes from the United States as the California crop rebounded from adverse weather impacts in MY 2023/24. Given anticipation of a strong Californian and U.S. grape crop for MY 2025/26, imports from the United States should continue to see strong demand and a recovery in U.S. market share. However, Canada-United States relationship tensions could potentially impact demand for U.S. product compared to other countries of origin. Much will likely depend on pricing with consumer sensitivity to pricing likely to outweigh other factors when making purchasing decisions. If retailers anticipate higher consumer demand for non-U.S. origin product, this could support larger volumes from Mexico, South Africa, and South America for MY 2025/26. But well-established transport logistics and geographic proximity will continue to see the United States as the top source market for MY 2025/26.

Table 7. Imports of fresh grapes into Canada by volume.

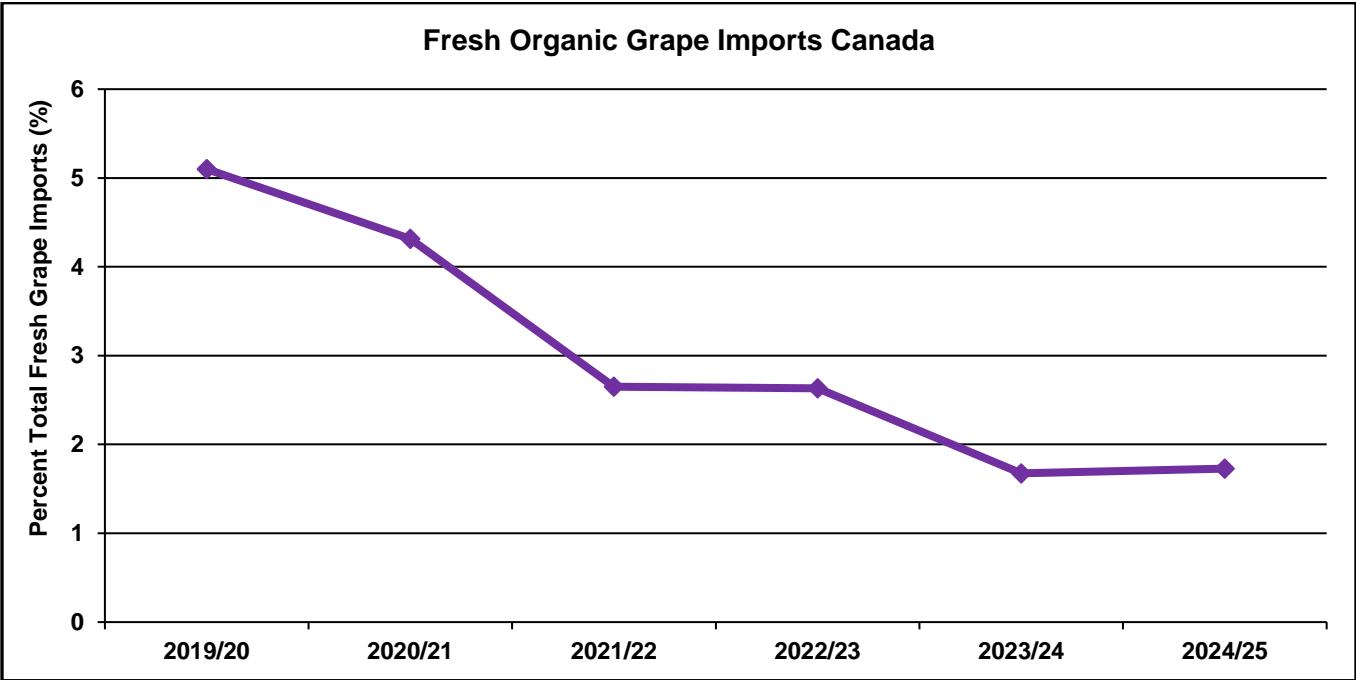
Canada: Imports of fresh grapes						
<i>Marketing year: June-May / Quantity in metric tons</i>						
	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
World	190,461	191,893	186,448	178,149	178,639	205,081
organic	9,713	8,280	4,940	4,686	2,993	3,542
other	180,241	183,098	180,988	172,897	175,187	196,510
United States	93,751	88,944	85,514	79,010	65,183	82,382
organic	5,861	5,906	3,302	3,291	1,768	2,197
other	87,545	82,556	81,713	75,299	63,039	79,123
CPTPP	72,980	76,544	75,446	80,216	86,066	92,037
Chile	29,709	27,743	28,165	26,076	29,887	30,687
Peru	18,104	23,859	26,947	35,174	29,659	38,341
South Africa	19,907	20,360	21,603	15,422	21,266	25,561
Mexico	25,163	24,942	20,332	18,951	26,495	22,980
All other countries	3,827	6,045	3,887	3,516	6,149	5,130
Import Market Shares						
United States	49.2%	46.4%	45.9%	44.4%	36.5%	40.2%
CPTPP	38.3%	39.9%	40.5%	45.0%	48.2%	44.9%
Chile	15.6%	14.5%	15.1%	14.6%	16.7%	15.0%
Peru	9.5%	12.4%	14.5%	19.7%	16.6%	18.7%
South Africa	10%	11%	12%	9%	12%	12%
Mexico	13.2%	13.0%	10.9%	10.6%	14.8%	11.2%

Source: Trade Data Monitor

Note: Tariff lines for organic grapes were introduced on January 1, 2009

Imports of organic fresh table grapes saw a slight increase in MY 2024/25 by volume. Given consumer price sensitivity, table grape imports are likely to be challenged in MY 2025/26. Organic grapes will continue to remain a small proportion of the overall import volume and domestic demand picture for table grapes in Canada.

Figure 15. Imports of fresh organic grapes into Canada as a percent of overall imports by volume.



Source: Trade Data Monitor, LLC

Canadian exports of fresh table grapes are virtually negligible, though Canada does import some fresh table grapes which are then re-exported. These re-exports account for all of Canada’s exports of fresh table grapes according to sources. Sources indicate that domestic production is entirely distributed to the domestic market at this time.

ADDITIONAL INFORMATION

Prices

Agriculture and Agri-Food Canada (AAFC) monitors fresh apple, pear and grape prices in the major Canadian wholesale markets. Any daily and weekly market wholesale prices are made available electronically at the AAFC [InfoHort website](#).

Policy:

Extension of Import Program for B.C. Wineries

Following industry estimates that British Columbia will remain 10,000 MT short of wine grapes for the 2025 season, the province has [extended](#) the 2024 support program. The 2024 program permitted imports of wine grapes, juice, and unfinished wine by eligible wineries to produce crafted in B.C. wines. The 2024 program was the result of a devastating extreme cold event which decimated wine grape production in B.C. Lingering damage to vineyards from that event continues to impact production in 2025, necessitating an extension of the program to permit wineries to supplement the shortfall in B.C. grape production with imports. The province has said that the program will not be renewed after the 2025 iteration.

Grocer Code of Conduct

The [Grocer Code of Conduct](#) cleared a significant hurdle in July 2024 with all major grocers having committed to supporting the Code. Now named the Canada Grocery Code, the first supplier and retailer members were [announced](#) in July 2025. The Code currently remains voluntary and is only applicable to members.

Promotion and Research Agency

The Canadian apple industry has been discussing the idea of establishing a national marketing agency to promote the consumption of apples and conduct various research projects for several years. This discussion is still occurring although no formal proposals have been put forth at this time. Such an agency would collect levies on both the domestic production and on imports of apples to fund its activities.

Attachments:

No Attachments