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Report Highlights:

Canadian apple production is forecast to see a slight decline in MY 2026/27, with lingering impacts from the previous year's drought suppressing volumes. Pear production is forecast to rise in MY 2026/27 as Ontario production recovers from the MY 2025/26 drought impacts. Production of table grapes is forecast to grow again in MY 2026/27 driven by production gains in Ontario. Imports of all three commodities are forecast to be up in MY 2026/27.

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

Executive Summary:

- FAS/Ottawa forecasts a slight reduction in MY 2026/27 apple production for Canada. This is driven by summer drought, heat, and wildfires adversely impacting production in B.C. In Ontario and Quebec, moisture conditions were improved following the previous year's drought, however, production estimates suggest that lingering impacts from the drought persist and volumes will be lower year-over-year.

- FAS/Ottawa is forecasting consumption to grow one percent in MY 2026/27, supported by improved local demand, however, a smaller U.S. crop could place downward pressure on consumption as imports will be necessary to supplement domestic production and the U.S. is historically the dominant supplier. FAS/Ottawa forecasts two percent growth in imports to support consumer demand. As growers look for profitability, a smaller U.S. crop could create opportunities along with new market access to Mexico for growers in Eastern Canada. FAS/Ottawa forecasts a two percent growth in exports compared to MY 2025/26, although volumes will remain small based on production.

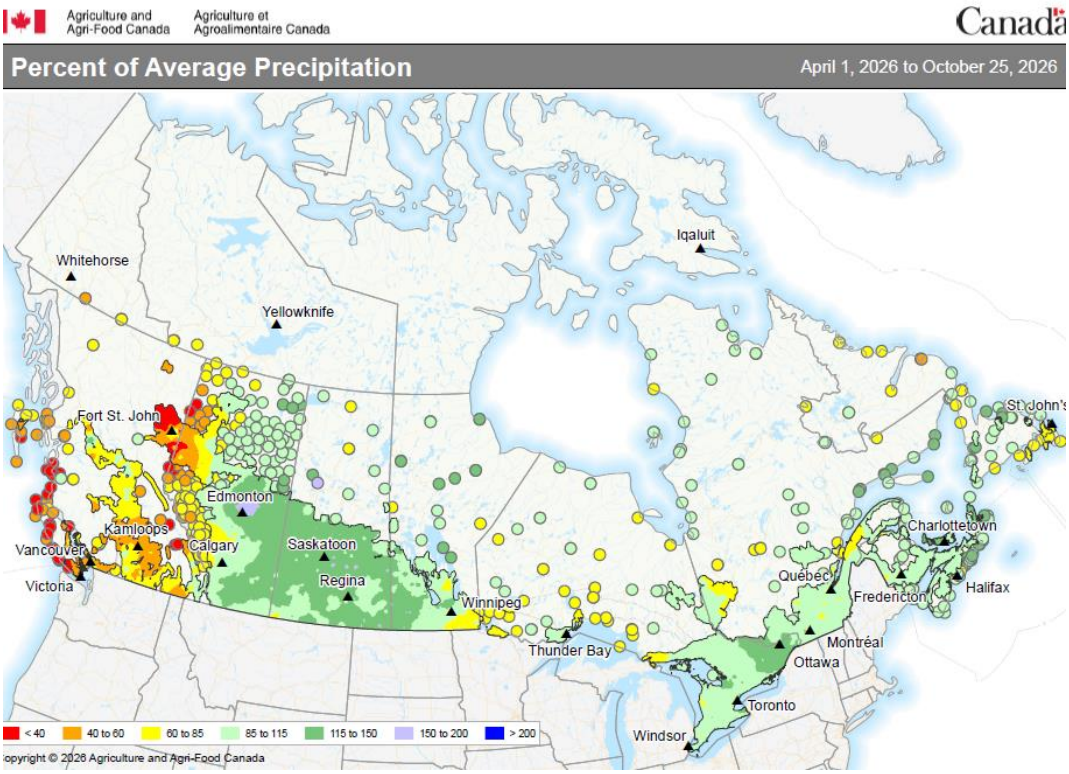
- FAS/Ottawa forecasts MY 2026/27 pear production up as Ontario production has rebounded from the MY 2025/26 drought. Ontario production did not appear to be adversely impacted by flooding, although MY 2027/28 could see impacts if tree damage materializes next season. British Columbia saw some areas impacted by spring frost but is estimated to have an average production year. There appears to be anomalies in Canada's official statistics for MY 2025/26 which contradict industry reports.

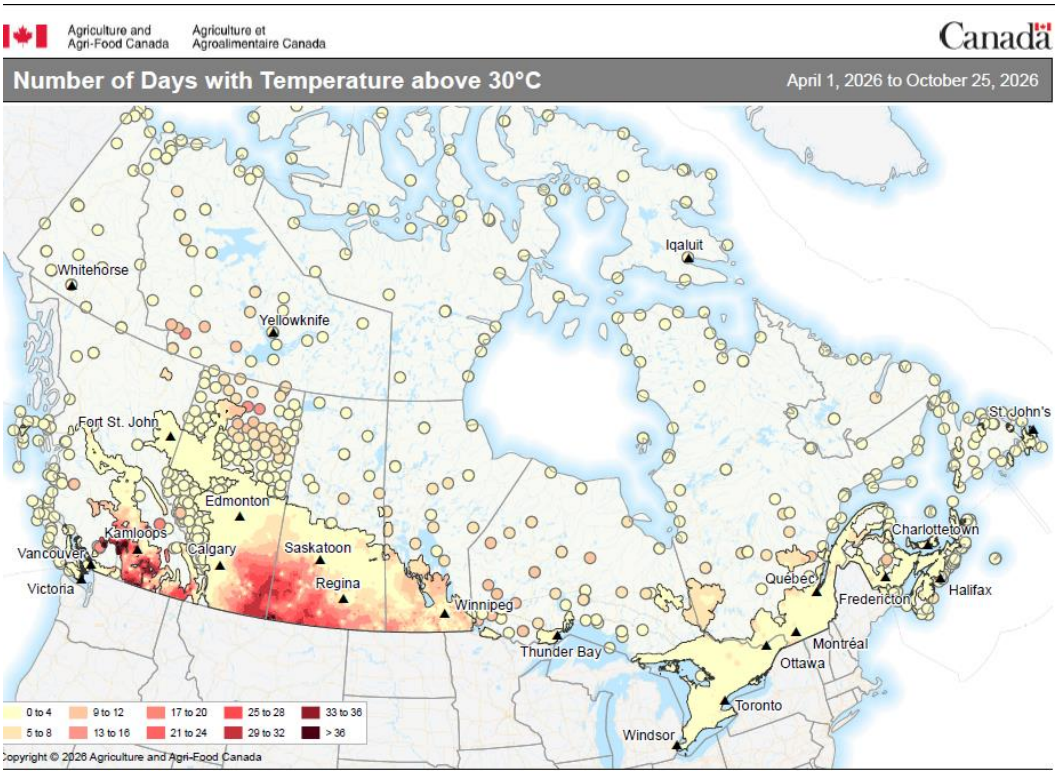
- Imports of fresh pears are forecast to decline four percent in MY 2026/27. As with MY 2024/25, this decline is anticipated to be driven by a small U.S. pear crop. A larger Canadian pear crop will help support domestic pear availability and imports from non-U.S. markets are likely to gain market share.

- FAS/Ottawa forecasts another year of growth for Canadian table grape production in MY 2026/27. Increased production in Ontario will fuel this growth although growers will be watching for latent impacts on vines from flooding which could impact MY 2027/28.

- Imports of fresh table grapes are forecast to grow in MY 2026/27 on anticipation of greater supply availability from the United States and globally.

Figure 1. Precipitation and temperature maps for 2026 growing season.





Source: Agriculture and Agri-Food Canada

APPLES

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

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

APPLES Fresh Canada	2024/2025		2025/2026		2026/2027*	
	Marketing Year: July-June					
	USDA Official	NEW FAS/Ottawa Data	USDA Official	NEW FAS/Ottawa Data	USDA Official	NEW FAS/Ottawa Estimates
Production	377,432	377,432	377,390	340,620	0	340,000
Imports	168,700	168,729	175,000	195,469	0	200,000
Total Supply	**546,132**	**546,161**	**552,390**	**536,089**	**0**	**540,000**
Domestic Consumption	493,232	493,254	497,390	497,007	0	500,000
Exports	52,900	52,907	55,000	39,082	0	40,000
Total Distribution	**546,132**	**546,161**	**552,390**	**536,089**	**0**	**540,000**

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

Production:

FAS/Ottawa forecasts a slight reduction in Canadian apple production for MY 2026/27. Despite positive early estimates in MY 2025/26, drought decimated a number of Canadian production areas leading to the lowest production volumes in over a decade. Despite improved moisture conditions in most regions for MY 2026/27, estimates suggest that production has not rebounded, with estimates placing most production regions at another year-over-year reduction. Orchards in B.C.'s Okanagan Valley were impacted by both drought and wildfire, with smaller sizing of apples. Quebec and Ontario reportedly had ample rains, with quality expected to be good.

Ontario continues to be the largest apple producing province in Canada, followed by Quebec and British Columbia. Orchard modernization continues to progress in Ontario with varieties like Gala and Honeycrisp dominating acreage as less popular varieties like McIntosh and Red Delicious see smaller plantings persist. Growers continue to chase more premium varieties, looking for higher profit margins as cost of growing continues to rise. Ontario's production occurs across a substantial area, unlike in

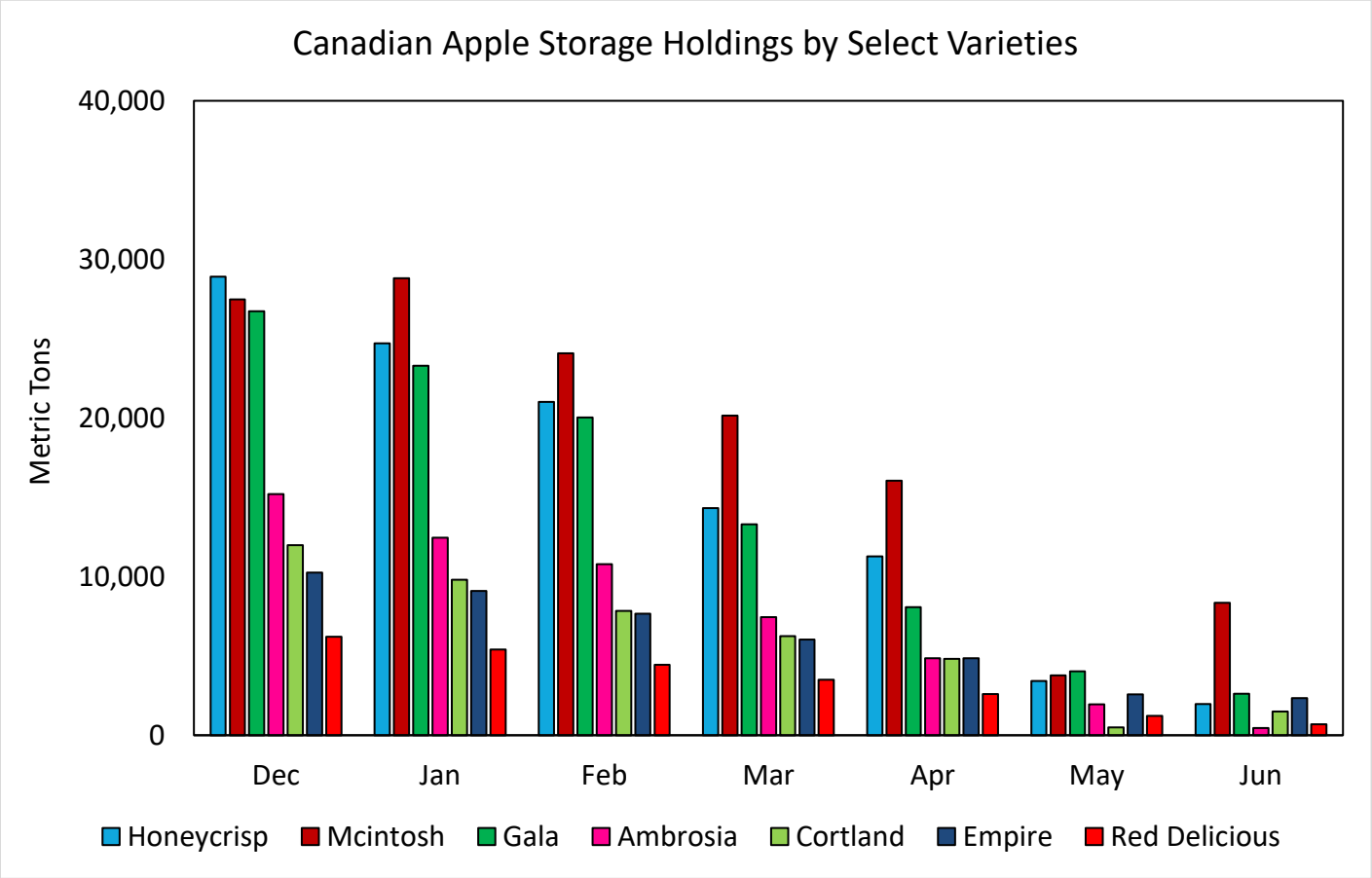
British Columbia and Nova Scotia where the majority of production occurs in a smaller geographic area. Consequently, weather impacts to crops can be highly variable across the sector in Ontario. While moisture was largely not an issue, some areas of the province, like the northwest, still saw persisting drought conditions. Localized hail damage occurred, but significant losses have not been reported. Ontario continues to focus on moving the majority of fresh production into domestic markets and leaning into “Buy Local” and “Buy Canadian” sentiment. The “Pick Ontario Apples” consumer campaign is running through March 2027 to promote domestic consumption.

Despite good moisture conditions, Quebec is indicating that production will not recover from the substantial drought-driven decline experienced in MY 2025/26. Fruit quality is reported to be very good, but it appears that trees carried forward a lingering impact from drought stress into MY 2026/27 Quebec producers continue to look to grow domestic sufficiency, with hopes that industry can reach a 70 percent market share of apple sales in Quebec; currently, 55 percent of Quebec apple sales are fulfilled by local orchards. Quebec producers continue to look for opportunities to modernize their acreage and increase plantings of consumer preferred varieties such as Ambrosia, Honeycrisp, and Gala. Warming winters have meant that Quebec growers can increasingly plant varieties which historically would not overwinter well in the province. 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. Industry has been lobbying for government support for re-planting programs.

Maritime production is estimated as average, with orchards recovering from last year’s drought. Nova Scotia’s apple production has reportedly seen a strong rebound from the drought impacts of MY 2025/26, with grower estimates suggesting production will increase 30 percent in MY 2026/27. Fruit size and quality are reportedly good. Unlike many producers in the Eastern United States, growers in Eastern Canada have not reported widespread cold or frost damage to the MY 2026/27 apple crop.

British Columbia production is anticipated to be below MY 2025/26 due to impacts from drought, heat, and wildfires. There are also concerns about forward impacts and potential tree loss which could materialize in MY 2027/28. Regionally, some spring frost and hail damage was observed.

Figure 2. Canadian apple storage holdings by select varieties for MY 2025/26.

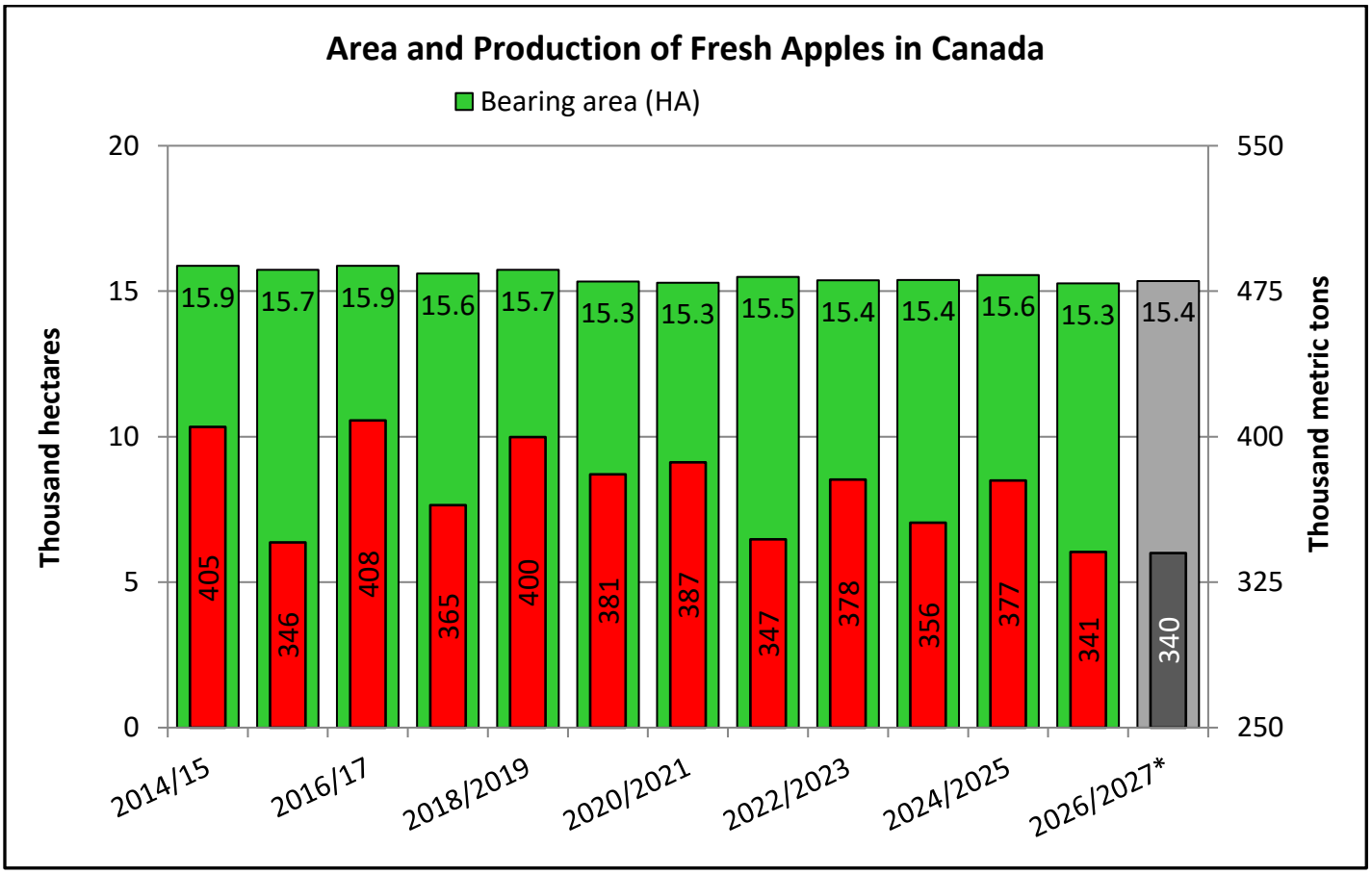


Source: Infohort, Agriculture and Agri-Food Canada

FAS/Ottawa forecasts acreage to decline one percent in MY 2026/27. While there may be more backyard and hobbyist acreage of fruit and apple trees, new commercial plantings tend to focus on high-density production systems with lower acreage requirements to support an increase in production. As a result, acreage decline may not be a negative indicator but instead could indicate industry innovation and adoption of more efficient growing practices.

Labor availability continues to be a challenge for industry. Canadian consumers have had concern about the rising cost of living for several years now. However, high fuel prices and inflation has seen more pessimism and concern about food costs rise in the general population. Retailers and growers are facing pressure to keep costs low for consumers.

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



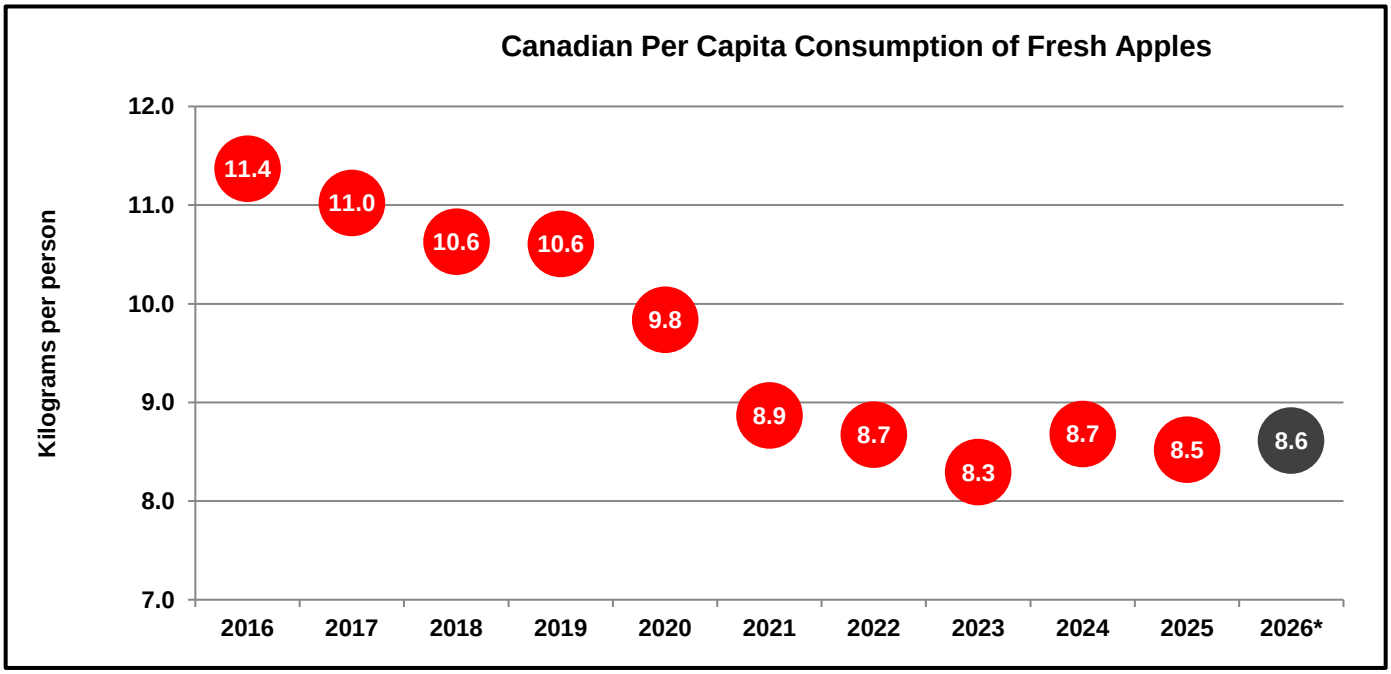
*Source: Statistics Canada / *FAS/Ottawa forecast*

Consumption:

FAS/Ottawa forecasts a one percent growth in domestic consumption for MY 2026/27. Imports will be needed to supplement lower domestic volumes to maintain apple availability. FAS/Ottawa forecasts that per capita consumption in MY 2026/27 will rise over MY 2025/26 as population growth has slowed while consumed volumes have maintained. Canada underwent a reform on immigration in 2025, following significant population growth fueled primarily from immigration in the post-pandemic years. There was significant pushback from Canadians against these elevated immigration numbers, resulting in a revised immigration strategy to slow population growth.

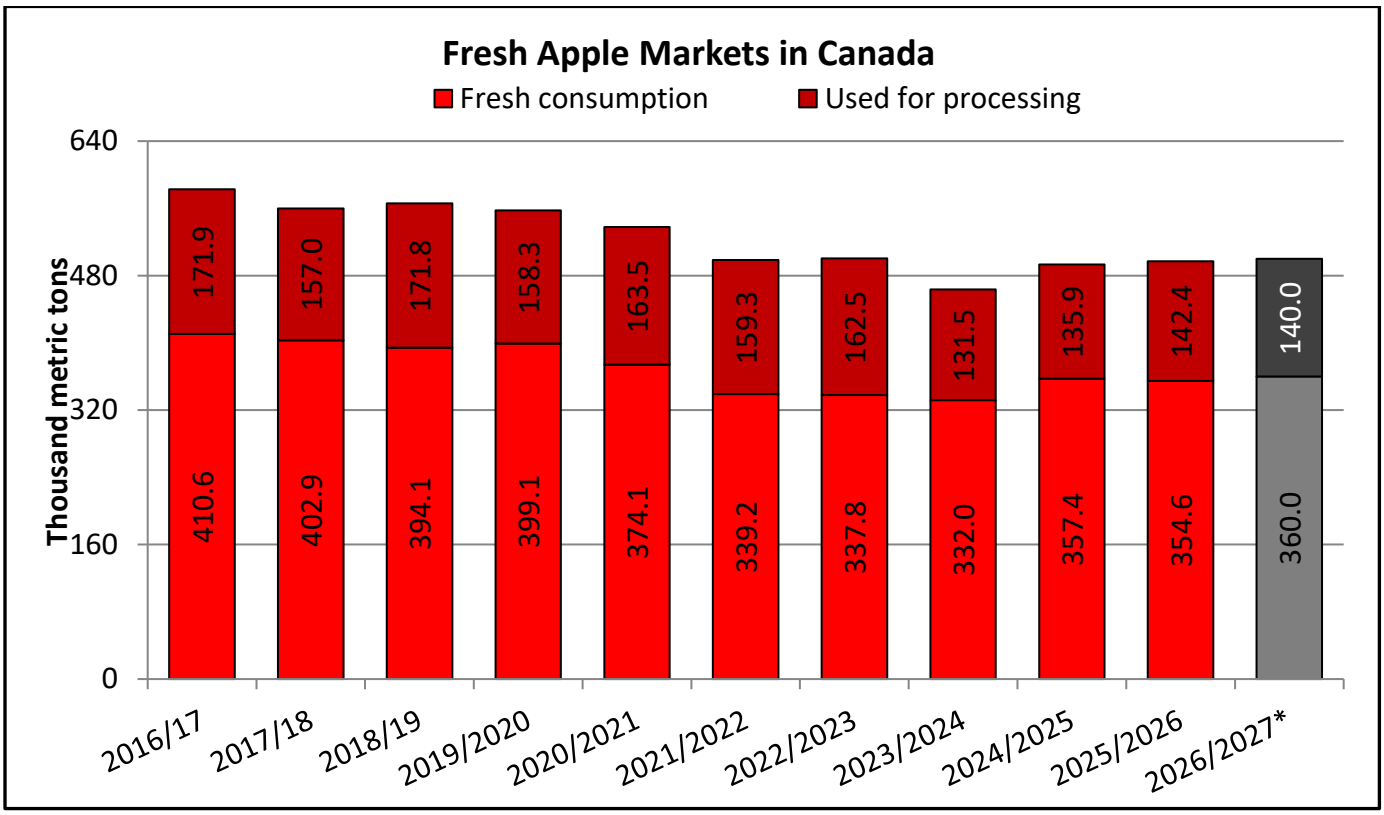
An anticipated smaller U.S. apple crop could affect consumption; however, Canada has been pivoting to alternative source markets and a strong forecasted crop from New Zealand would support increasing imports from that country to supplement domestic demand. Apples continue to face competition in the fresh produce aisle by berries and tropical fruits. However, 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, which may become increasingly import as consumers look to budget and minimize waste.

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:

FAS/Ottawa forecasts two percent growth in imports for MY 2026/27 on a smaller Canadian apple crop. Additional import volume will be necessary to supplement domestic supply to support consumer demand. A smaller U.S. apple crop could put downward pressure on import availability, as the United States is the largest supplier to Canada. However, ongoing tensions in the Canada-U.S. relationship have seen renewed fervor from Canadian consumers to demand non-American products in the grocery store. This will continue to support retailer diversification of supply chains and imports from non-U.S. markets. A question on U.S. apple availability and Canadian demand will remain in how pricing influences consumer sentiment and if Mexico persists with an anti-dumping case successfully against U.S. apples, this could see more supply pivot to Canada.

In MY 2025/26, despite calls for buy non-American and to diversify imports, U.S. apples saw an increased market share of Canada's total apple imports. A bumper U.S. apple crop supported this trend. Canada also markedly increased imports from New Zealand, however, against the U.S. market share of 84 percent, New Zealand's market share only grew to 5.5 percent. Still, it is anticipated that New Zealand should continue to see market gains into Canada into MY 2026/27. As mentioned in last year's report, Canada approved market access for Ukrainian apples in March 2025. Australia was 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. A smaller forecast EU apple crop is expected to once again put downward pressure on imports from the EU in MY 2026/27.

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.

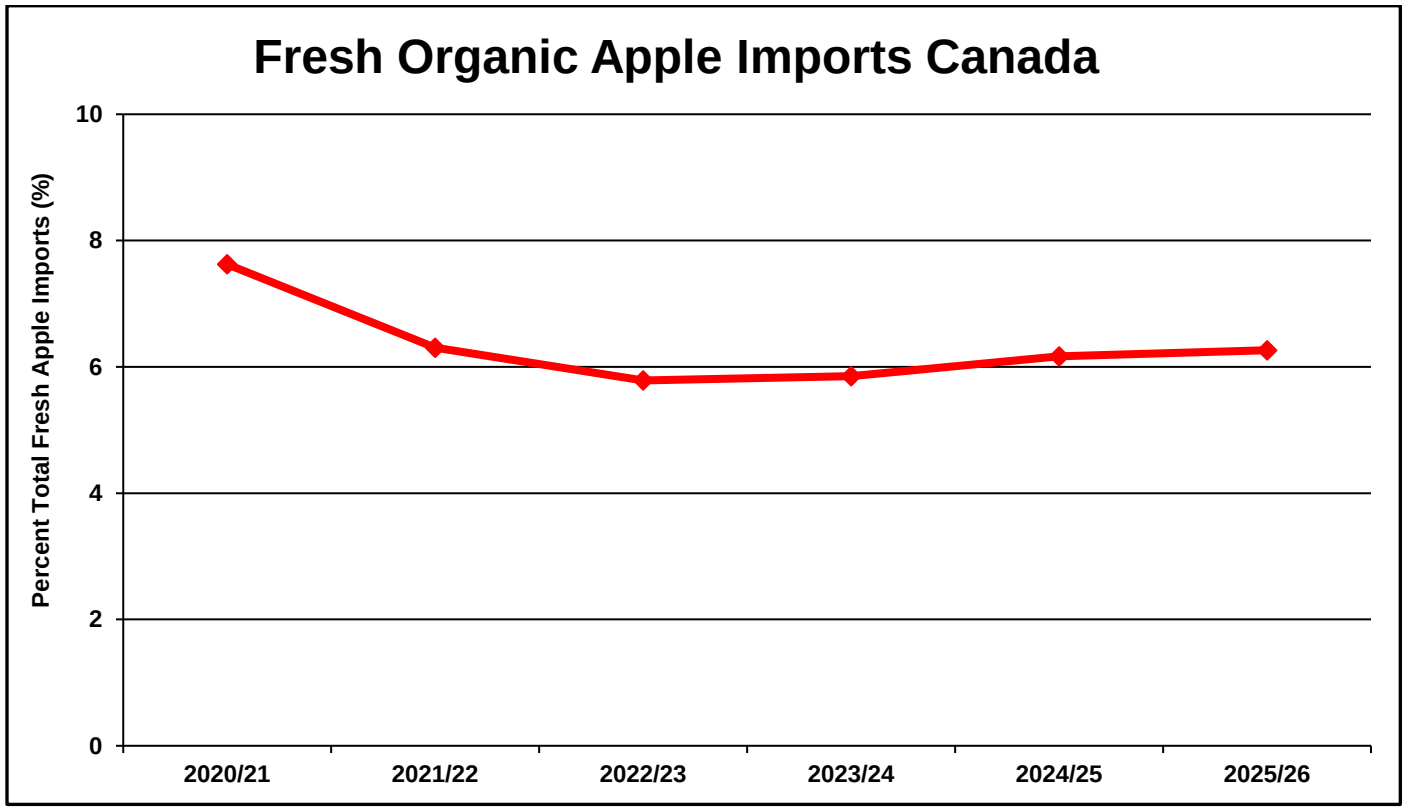
Canada: Imports of fresh apples						
Marketing year: July-June / Quantity in metric tons						
	2020/21	**2021/22**	**2022/23**	**2023/24**	**2024/25**	**2025/26**
World	**190,354**	**205,865**	**184,906**	**163,871**	**168,729**	**195,469**
for processing	66,450	73,890	58,796	37,756	41,954	65,921
organic	14,513	12,977	10,697	9,592	10,408	12,248
other	109,390	118,997	115,409	116,520	116,366	117,302
United States	**157,376**	**171,998**	**149,979**	**140,182**	**137,020**	**163,738**
for processing	64,648	72,465	57,458	36,656	34,737	62,359
organic	12,730	11,150	9,739	9,056	9,718	10,534
other	79,997	88,383	82,780	94,469	92,566	90,844
Chile	14,469	15,870	12,715	6,993	8,232	8,653
European Union	4,881	2,521	3,722	677	1,420	518
Italy	4,643	1,702	3,451	471	1,260	388
New Zealand	5,553	7,734	9,501	8,696	8,686	10,821
China	2,839	1,683	1,901	2,397	2,704	2,417
All other countries	5,474	6,878	7,359	5,132	10,827	9,452
Import Market Shares						
United States	82.7%	83.5%	81.1%	85.5%	81.2%	83.8%
Chile	7.6%	7.7%	6.9%	4.3%	4.9%	4.4%
European Union	2.6%	1.2%	2.0%	0.4%	0.8%	0.3%
Italy	2.4%	0.8%	1.9%	0.3%	0.7%	0.2%
New Zealand	2.9%	3.8%	5.1%	5.3%	5.1%	5.5%
China	1.5%	0.8%	1.0%	1.5%	1.6%	1.2%

Source: Trade Data Monitor

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

Imports of organic apples remain a small percent of overall apple imports. The United States continues to be the overwhelmingly dominant source market for imports of organic apples. Price sensitive consumers could negatively impact demand for more premium product, such as organic apples, in MY 2026/27.

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



Source: Trade Data Monitor

Canadian fresh apple exports dropped to a five-year low by volume in MY 2025/26, with a smaller Canadian crop negatively impacting export volumes. Apple exports for processing were at a higher volume than non-processing exports, as domestic demand on a smaller crop kept more fresh apples in Canada. Canada has limited apple processing capacity meaning that in years with more quality challenges, Canada has more processing apples available for export. On a smaller forecast domestic crop for MY 2026/27, FAS/Ottawa is still forecasting a two percent growth in exports. This will be supported by processing exports and by U.S. demand with a smaller U.S. apple crop available. Canada also continues to aggressively pursue export diversification opportunities. Canada and Mexico have agreed on a protocol for market access for apples from Eastern Canada, and with a smaller U.S. crop and potential anti-dumping case on U.S. apples, this could present an improved export opportunity for Canadian apples to that market. While Canada still has a tariff advantage over U.S. apples into Vietnam, exports to that market have struggled in recent years, likely driven by quality challenges. While the

Indo-Pacific regions remains a target for Canadian agricultural exports, limited production volumes will impact volumes moving into those markets. The United States is anticipated to once again be the dominant export market, at over 50 percent by volume, for Canadian exports in MY 2026/27.

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

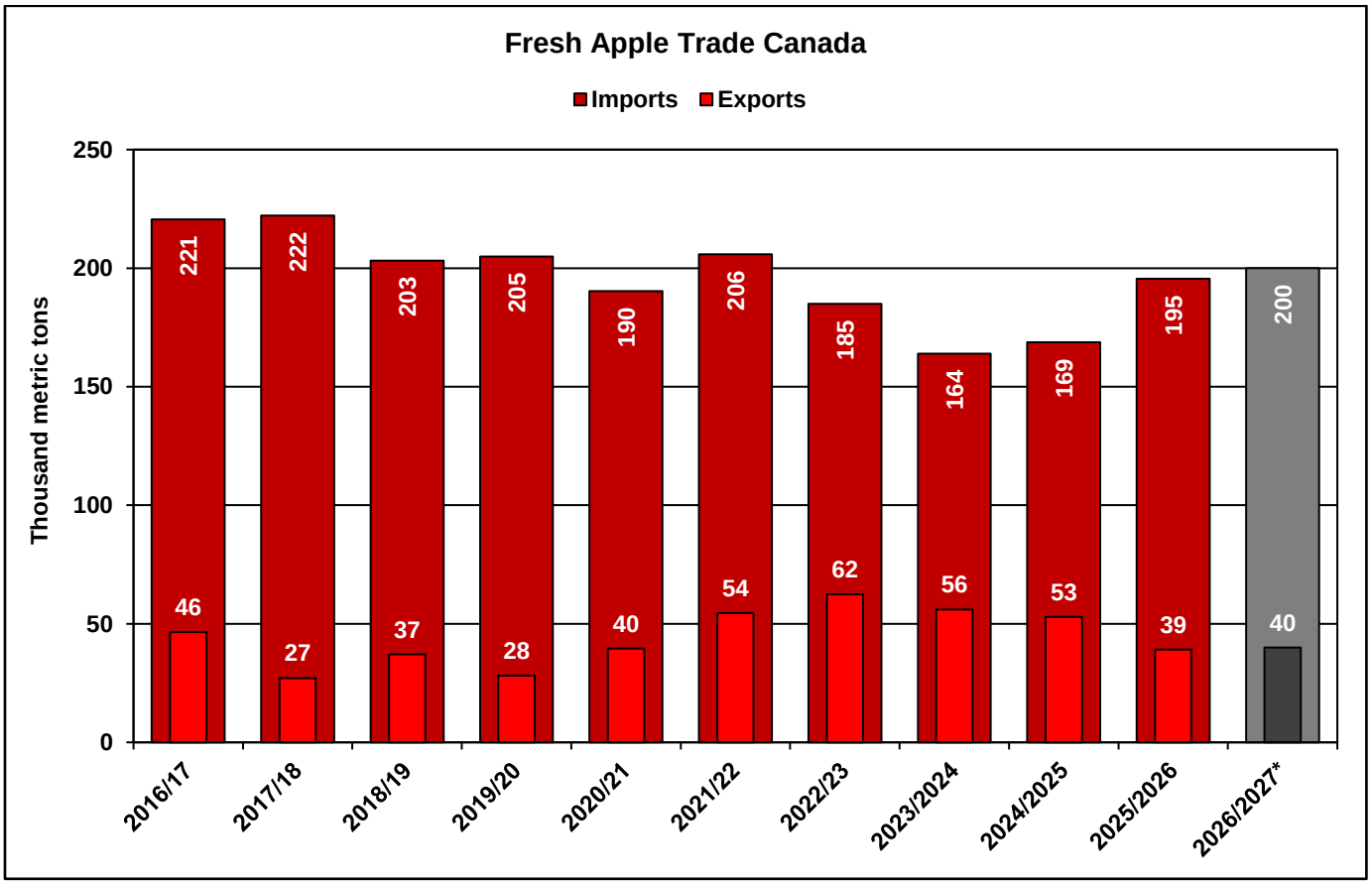
Canada: Exports of fresh apples

Marketing year: July-June / Quantity in metric tons

	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
World	**39,536**	**54,475**	**62,405**	**56,029**	**52,907**	**39,082**
for processing	20,534	20,071	24,064	19,735	30,778	20,796
other	19,001	34,404	38,341	36,294	22,129	18,286
United States	**20,887**	**21,548**	**24,771**	**22,430**	**30,714**	**20,791**
for processing	15,770	16,392	20,223	15,967	26,407	18,065
other	5,118	5,156	4,548	6,464	4,307	2,726
Vietnam	8,645	23,365	31,692	26,346	18,536	12,116
India	2,702	4,198	1,170	604	236	312
Cuba	1,564	1,210	646	1,148	841	764
All other countries	8,440	8,352	5,296	6,105	2,816	5,411

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 reflect FAS/Ottawa's assessments and are NOT official USDA data

PEARS Fresh Canada	2024/2025		2025/2026		2026/2027*	
	Marketing Year: July-June					
	USDA Official	NEW FAS/Ottawa Data	USDA Official	NEW FAS/Ottawa Data	USDA Official	NEW FAS/Ottawa Estimates
Production	8,766	9,043	8,800	10,063	0	9,500
Imports	51,700	51,643	60,000	55,084	0	53,000
Total Supply	**60,466**	**60,686**	**68,800**	**65,147**	**0**	**62,500**
Domestic Consumption	60,266	60,452	68,500	64,830	0	62,150
Exports	200	234	300	317	0	350
Total Distribution	**60,466**	**60,686**	**68,800**	**65,147**	**0**	**62,500**

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

Production:

Statistics Canada reported Canadian pear production at the largest volumes since 2013 for MY 2025/26, despite a substantial reduction in acreage. While orchard densification has occurred, reported yields for certain growing regions were significantly higher than previous reference years. Reported production for the province of Ontario also contradicted industry reported volumes, with official statistics reported a year-over-year increase in production against industry reporting a substantial reduction in production due to drought and heat. Against official Canadian statistics, FAS/Ottawa us forecasting a reduction in

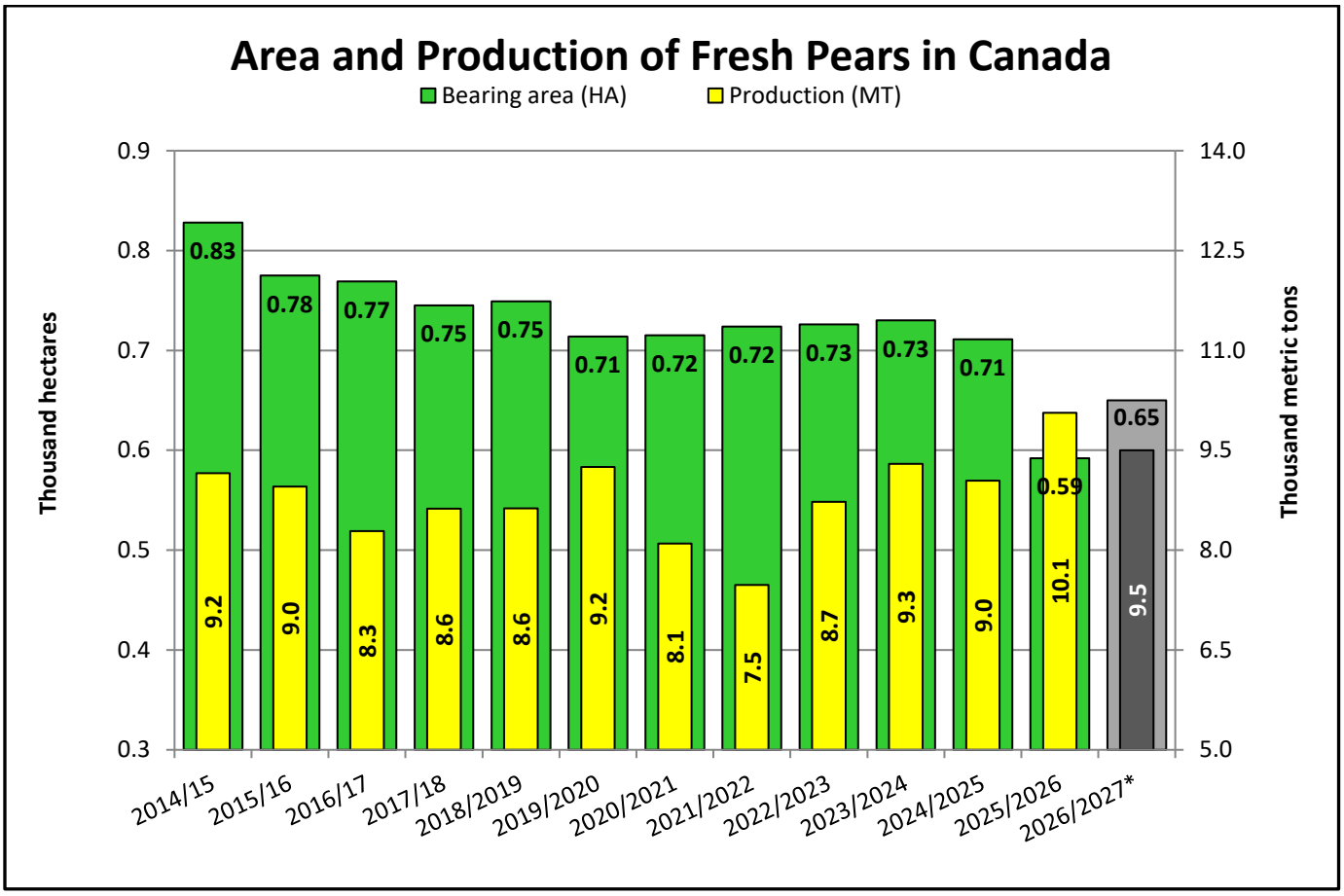
production, however, FAS/Ottawa is forecasting a growth in production for MY 2026/27 based on discussions with industry, with a larger pear crop anticipated in Ontario as a result of improved growing conditions relative to MY 2025/26.

Over 90 percent of Canada's pear production is concentrated in Ontario and British Columbia, with B.C. typically edging out Ontario for top producer. There has been growth in production in Quebec and Nova Scotia, but this remains minimal against production volumes in Ontario and B.C. For MY 2026/27, production in British Columbia is forecast to see an average production. Spring frost may have impacted some orchards but there are no reports of substantial cold damage similar to what transpired in MY 2024/25 when production fell 21 percent year-over-year. The Ontario crop has reportedly rebounded in MY 2026/27, following an industry reported 11 percent decline in volumes for MY 2025/26. In MY 2025/26, the Ontario crop was severely impacted by drought and heat. Estimates indicate production has likely recovered in volume what was lost to drought in the last crop year. Volumes mean that Ontario expects to be able to market pears through December, possibly into January as well. The majority of Ontario's production is concentrated in the Niagara region, which received significant moisture during the summer, including some flooding events. Industry reports that this does not appear to have negatively impacted the crop, outside of some additional disease challenges, and that volumes are substantially higher with recovery over last year's losses. There is concern that some orchards may see delayed flood impacts with damaged trees in MY 2027/28, however, there are currently no estimates on damage.

As noted above, there appeared to be some anomalies in Canada's official statistics for pears for MY 2025/26. Official statistics reported a substantial decline in both planted and harvested acres. While weather impacts would likely have resulted in a greater disparity between planted and harvested acres, with fewer acres harvested due to production losses, communications with contacts do not suggest that overall planted acreage declined by the amount officially reported. Canadian pear acreage has been in decline since MY 2021/22 due to removal of acreage and densification of orchards. FAS/Ottawa anticipates that a decline in acreage would have occurred in MY 2025/26, but perhaps not to the level officially recorded. FAS/Ottawa is placing the acreage forecast at a larger number of acres for MY 2026/27 compared to the official MY 2025/26, but anticipates that overall Canadian acreage will continue to remain below MY 2024/25. Growers continue to trial new varieties such as Happi Pear®. Acres of these varieties are expected to increase if consumer demand continues to trend positively.

Overall, Canadian production continues to remain relatively small to consumer demand. 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.



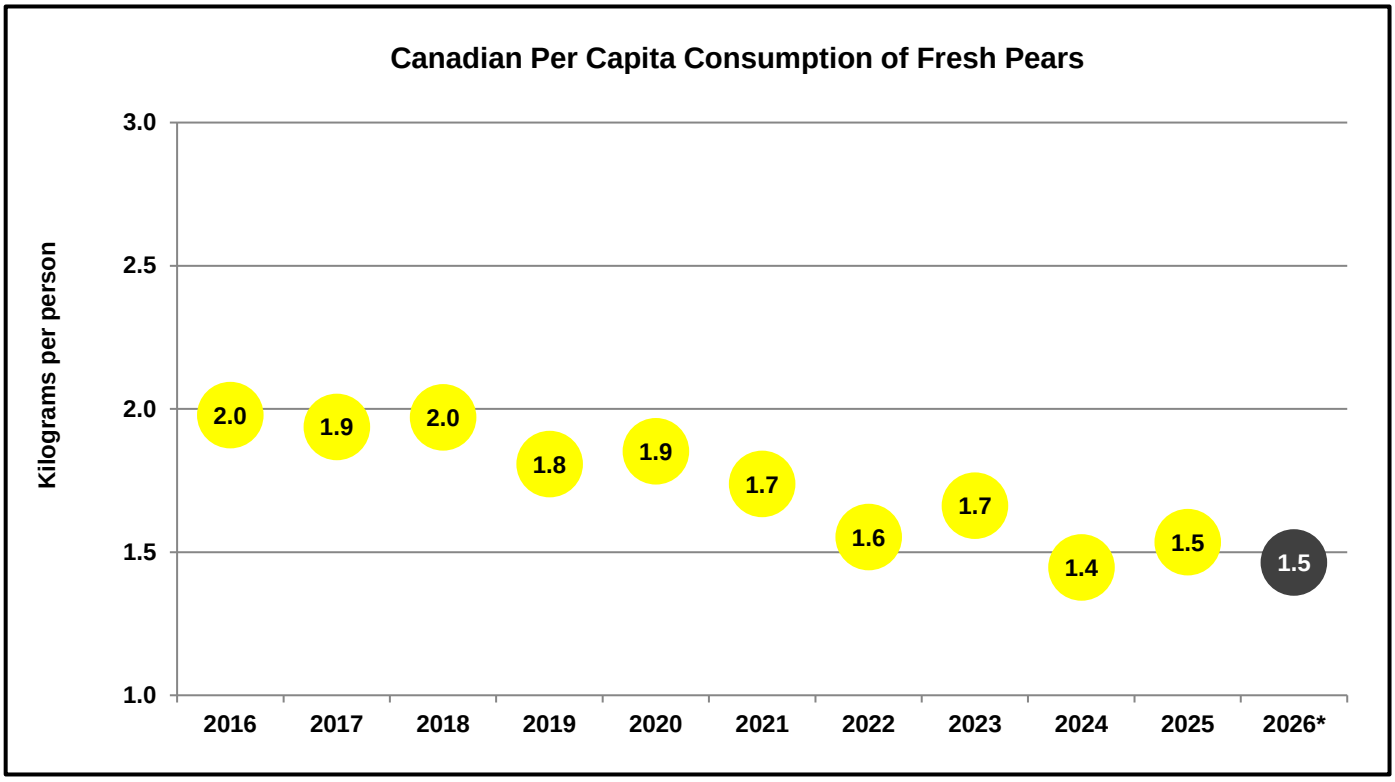
*Source: Statistics Canada / *FAS/Ottawa forecast*

Consumption:

FAS/Ottawa forecasts per capita domestic consumption to remain stable for MY 2026/27. Given the rise in population, although slower growth relative to previous years, overall consumption will see a reduction. Canada underwent a reform on immigration in 2025, following significant population growth fueled primarily from immigration in the post-pandemic years. There was significant pushback from Canadians against these elevated immigration numbers, resulting in a revised immigration strategy to slow population growth.

A larger domestic crop will support consumption, but a smaller U.S. crop will weigh negatively on imports and is anticipated to impact overall availability; the majority of Canada's fresh pear consumption is supported through imported pears. Approximately 90 percent of Canadian consumption of fresh pears is satisfied through imports, with the majority of 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.

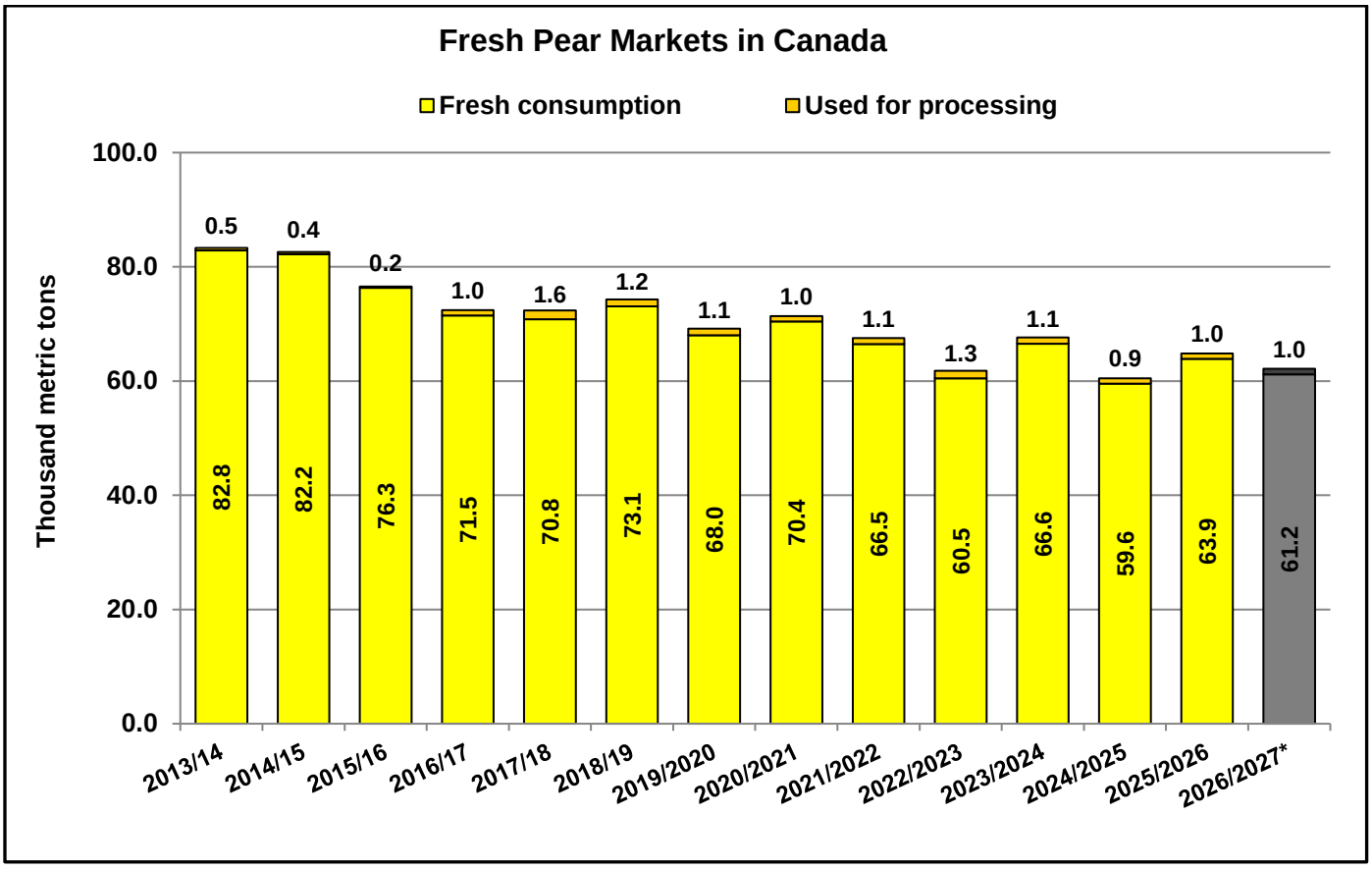
Figure 9. Evolution of Canadian per capita consumption of fresh pears.



*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.

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



*Source: Statistics Canada / *FAS/Ottawa forecast*

Trade:

Following growth in imports in MY 2025/26, FAS/Ottawa is forecasting a reduction in import volumes for MY 2026/27. This reduction will be driven by a larger domestic pear crop and a smaller U.S. pear crop. Estimates suggest that the U.S. will have a significant year-over-year drop in pear production and overall, a small crop in volume. The United States is the dominant source market for Canada's imports of fresh pears and typically holds close to 50 percent market share. In past years with reduced availability of U.S. pears, U.S. market share fell but so did Canada's import volumes. Retailers will attempt to pivot and secure other supply, however, cost and pricing remain factors. While Canada continues to place focus on trade diversification away from the United States amidst tensions, and with renewed anti-American sentiment from consumers, the reality is that consumers remain price sensitive and this is a factor in sourcing from non-U.S. markets. U.S. market share is likely to erode, but it should still remain the top market given established supply chains and geographic proximity.

As with MY 2024/25, when U.S. pear production saw a smaller crop, FAS/Ottawa anticipates that additional volumes from markets like China, South Africa, and South America will be sourced. Estimates of increased EU production could see larger volumes imported from the EU as well. If supply constraints materialize in Southern Hemisphere production, this would put additional downward pressure on import volumes and consumption. Canadian volumes are generally marketed by end of year, early the following year, with imports then needed to supply demand through to the following harvest. While investments in controlled atmosphere storage have been made, the smaller volume of Canadian harvest means that retailers typically pull all volumes within that period.

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

Canada: Imports of fresh pears

Marketing year: July-June / Quantity in metric tons

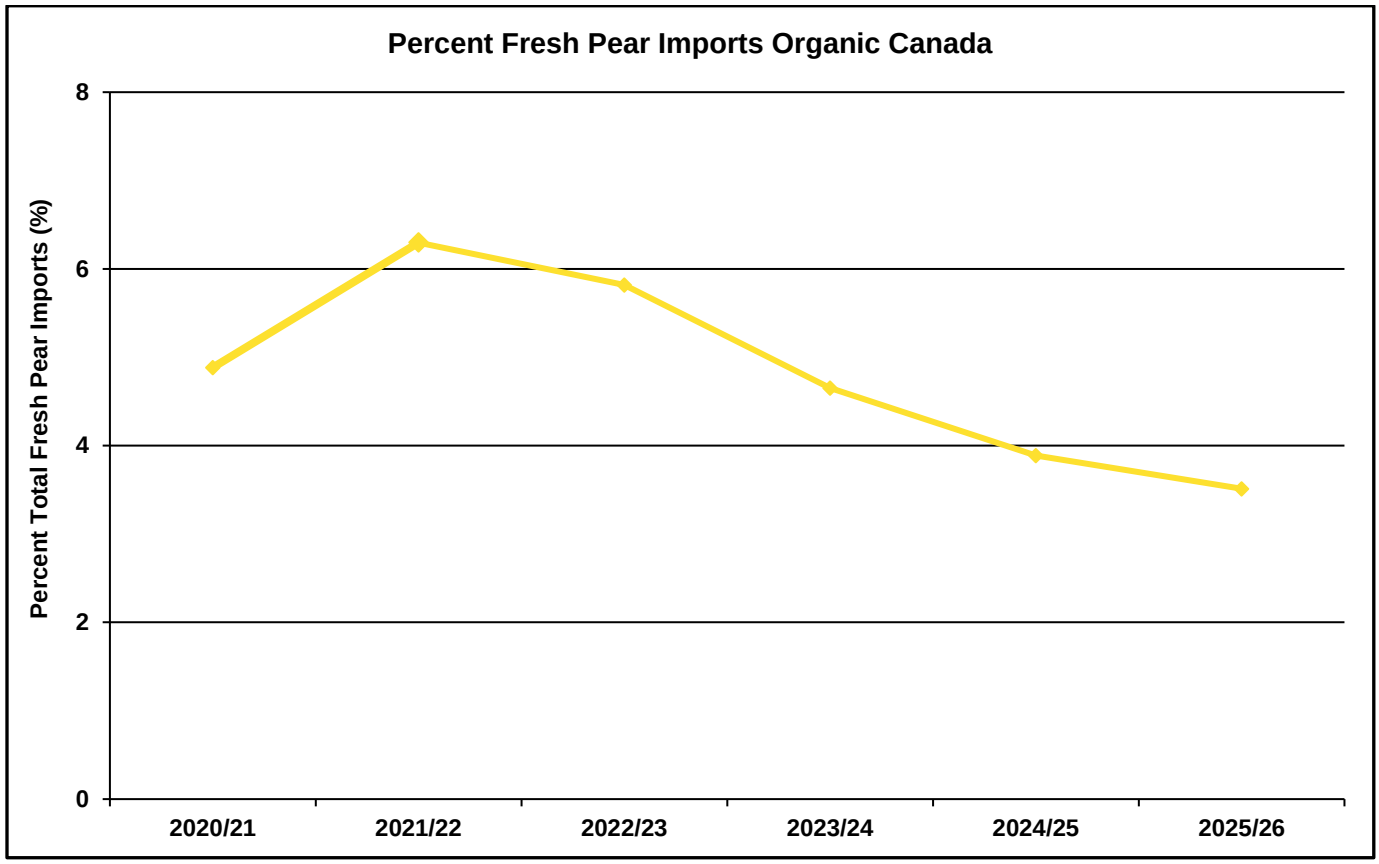
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
World	**63,491**	**60,313**	**53,164**	**58,626**	**51,643**	**55,084**
for processing	126	448	820	252	344	521
organic	3,101	3,798	3,093	2,728	2,009	1,935
other	60,263	56,067	49,251	55,647	49,289	52,629
United States	**30,217**	**30,830**	**24,531**	**27,841**	**17,255**	**25,756**
for processing	126	435	820	252	344	521
organic	1,671	1,762	1,431	1,225	1,152	1,323
other	28,420	28,633	22,281	26,365	15,759	23,913
Argentina	11,974	11,005	10,806	9,716	9,626	9,375
China	9,897	8,243	8,638	10,426	11,682	11,340
South Africa	6,521	6,219	6,275	7,136	8,121	5,268
European Union	2,757	2,284	1,598	1,570	2,511	1,666
Portugal	2,094	2,085	1,392	1,463	2,275	1,543
All other countries	2,788	1,931	1,522	2,044	2,684	1,802
Import Market Shares						
United States	47.6%	51.1%	46.1%	47.5%	33.4%	46.8%
Argentina	18.9%	18.2%	20.3%	16.6%	18.6%	17.0%
China	15.6%	13.7%	16.2%	17.8%	22.6%	20.6%
South Africa	10.3%	10.3%	11.8%	12.2%	15.7%	9.6%
European Union	4.3%	3.8%	3.0%	2.7%	4.9%	3.0%
Portugal	3.3%	3.5%	2.6%	2.5%	4.4%	2.8%

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 and with a smaller U.S. crop, FAS Ottawa anticipates that imports of organic pears will fall once again in MY 2026/27. The majority of Canada's organic pear imports come from the United States.

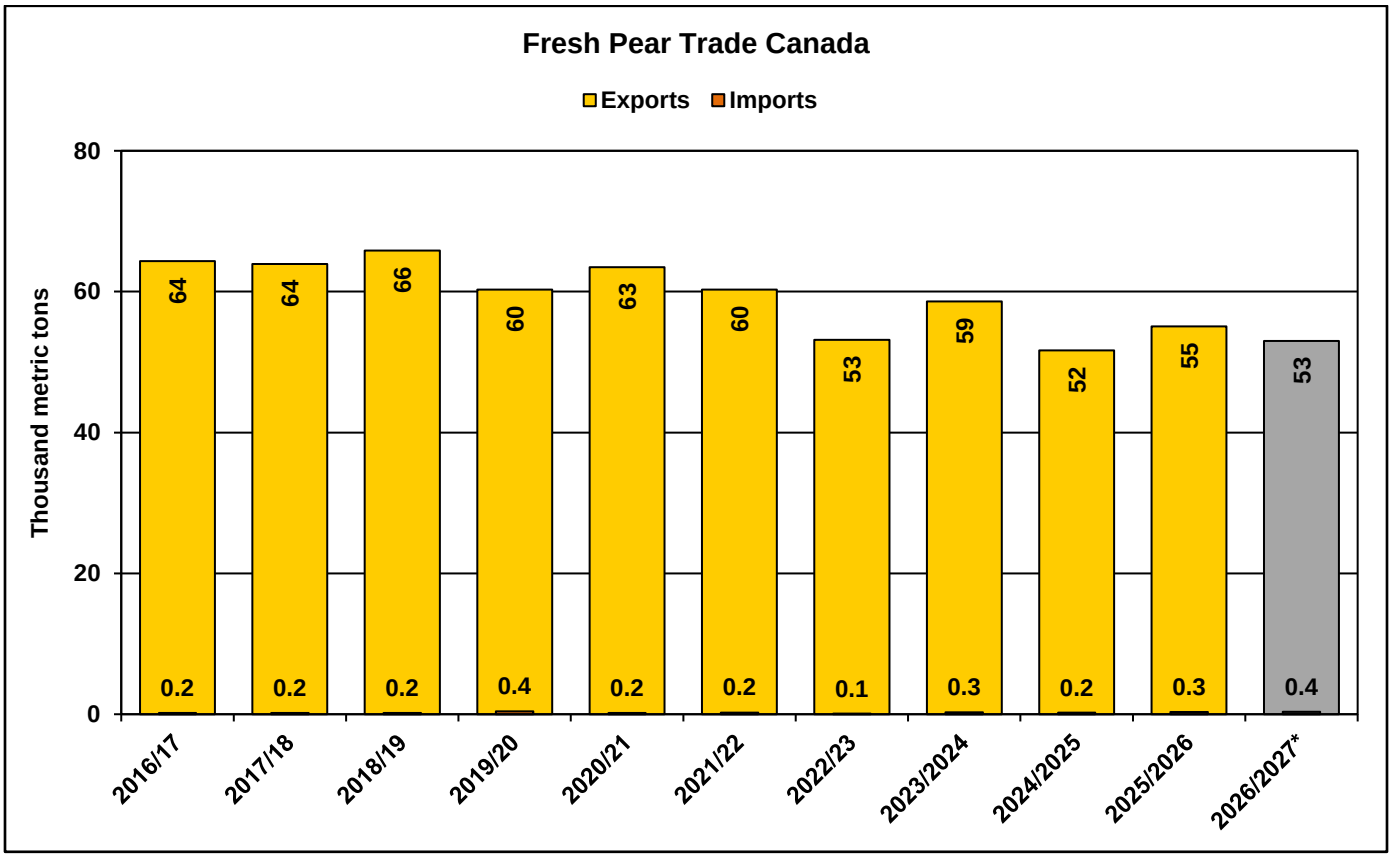
Figure 11. Imports of fresh organic pears into Canada as a percent of overall imports by volume.



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. An ample supply of pears in Canada for MY 2026/27 and an estimated reduction in the U.S. pear crop will support growth in export volumes. However, these volumes will remain minimal.

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 reflect FAS/Ottawa's assessments and are NOT official USDA data

GRAPES Fresh Canada	2024/2025		2025/2026		2026/2027*	
	Marketing Year: June-May					
	USDA Official	NEW FAS/Ottawa Data	USDA Official	NEW FAS/Ottawa Data	USDA Official	NEW FAS/Ottawa Estimates
Production	1,191	1,472	2,200	2,341	0	2,500
Imports	204,600	204,506	200,000	194,114	0	195,000
Total Supply	**205,791**	**205,978**	**202,200**	**196,455**	**0**	**197,500**
Domestic Consumption	205,791	205,978	202,200	196,455	0	197,500
Exports	0	0	0	0	0	0
Total Distribution	**205,791**	**205,978**	**202,200**	**196,455**	**0**	**197,500**

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

Production:

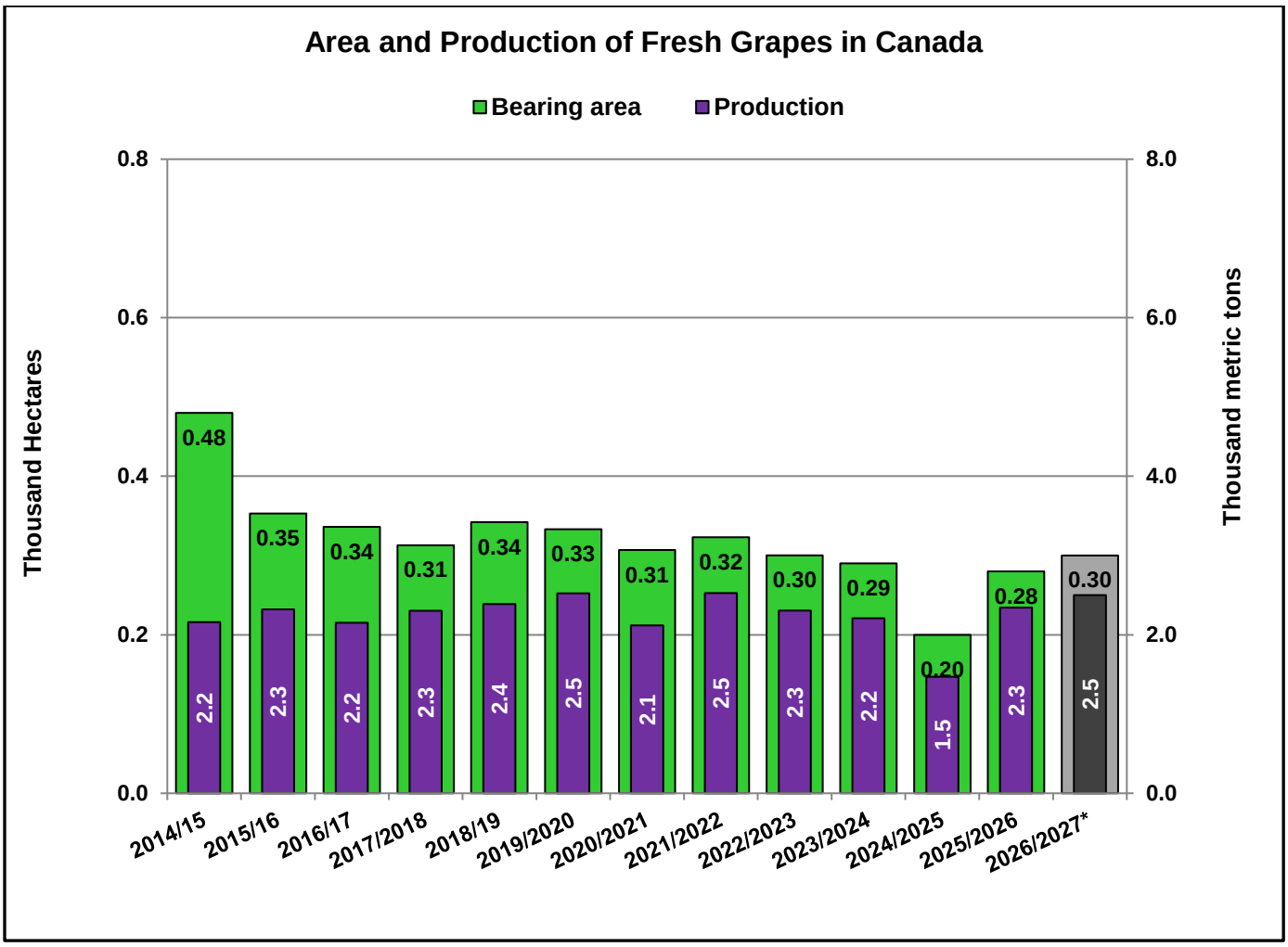
The majority of grape acreage and production in Canada is dedicated to the production of wine grapes, while table grapes comprise less than five percent of total Canadian grape production.

FAS/Ottawa forecasts growth in table grape production for MY 2026/27 with expectations of a year-over-year increase in Ontario table grape production. Despite significant rainfall events in the Niagara peninsula, the main growing region for Canadian table grapes, industry reports that production has performed strongly. While the wet weather did increase disease pressures, the crop appears to have recovered, although vine impacts from flooding are not yet quantified which could see impacts to the MY 2027/28 crop.

Canada’s table grape production is highly concentrated in Ontario, with B.C. as the only other province with notable production; B.C.’s production accounts for roughly 15 percent of Canadian production with

Ontario accounting for over 80 percent of Canadian table grape production. B.C. is anticipated to produce an average crop.

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. However, Ontario continues to trial new varieties to appeal to changing consumer preferences and has steadily made investments in additional acreage. B.C. has reportedly increased their wine grape acreage for MY 2026/27, while FAS/Ottawa forecasts that Canadian table grape acreage will see growth as a result of increased plantings primarily in Ontario.

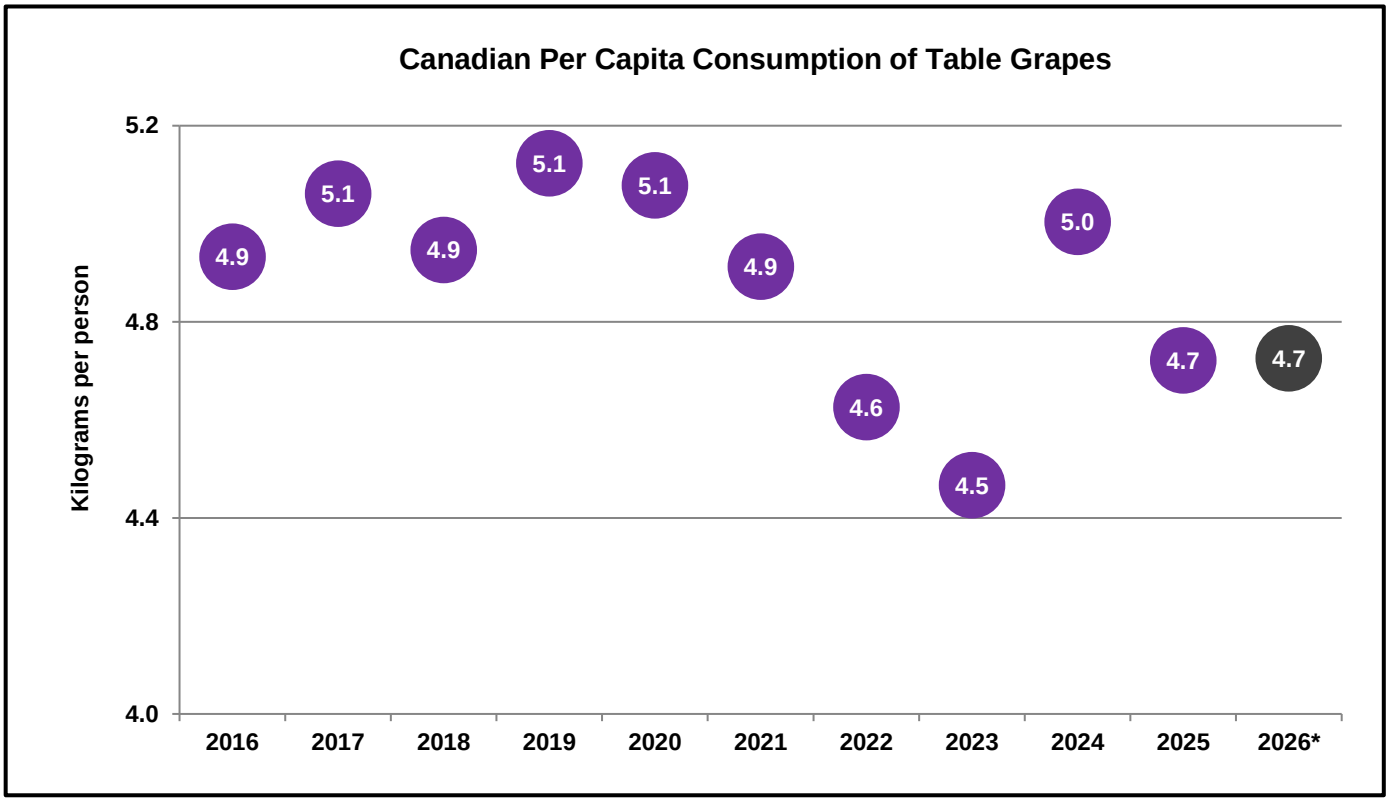
Consumption:

FAS/Ottawa forecasts stable per capita domestic consumption in MY 2026/27. Canadian consumption will be supported by the larger domestic crop but is primarily fulfilled by imports. With estimates of a larger California crop, stable EU crop, and growth in South Africa production, import availability should sufficiently support additional consumption due to population growth, while maintaining a stable per capita consumption. Canada underwent a reform on immigration in 2025, following significant population growth fueled primarily from immigration in the post-pandemic years. There was significant pushback from Canadians against these elevated immigration numbers, resulting in a revised immigration strategy to slow population growth.

Cost of living and inflation remain a significant concern to Canadian consumers. Table grapes, like other fresh fruit commodities, face significant competition in the fresh produce aisle as consumers seek healthy but high quality and affordable options. Table grapes are often less competitively priced against fruits such as apples and pears, however, a larger Canadian crop and California crop should support more favorable pricing 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 one percent rise in import volumes for MY 2026/27. Greater global availability and stable consumer demand in Canada will support additional imports even with a larger domestic crop. Canadian production is minimal compared to consumer demand meaning that substantial import volumes are required relative to domestic production to meet domestic demand.

Imports from the United States were down by volume in MY 2025/26, primarily driven by a smaller U.S. crop but fallout from tense Canada-United States relations also impacted consumer purchasing behavior. Consumers have held an anti-American sentiment especially towards U.S. food products in response to Canada-United States tensions. Calls for boycotts were renewed once again in August with additional tariff announcements, however, consumers are also highly price conscious and price points are likely to sway behavior moving forward. Retailers and government continue to note attempts at diversification to non-U.S. markets, but again, price, logistics, and availability will factor into the feasibility of actually implementing any meaningful shifts away from U.S. product. A larger U.S. crop will also make those imports attractive given availability and geographic proximity in addition to

established supply chains. Retailers looking to cater to consumer demand for non-U.S. product will look to grow sourcing from South Africa and South America depending on production.

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

Canada: Imports of fresh grapes

Marketing year: June-May / Quantity in metric tons

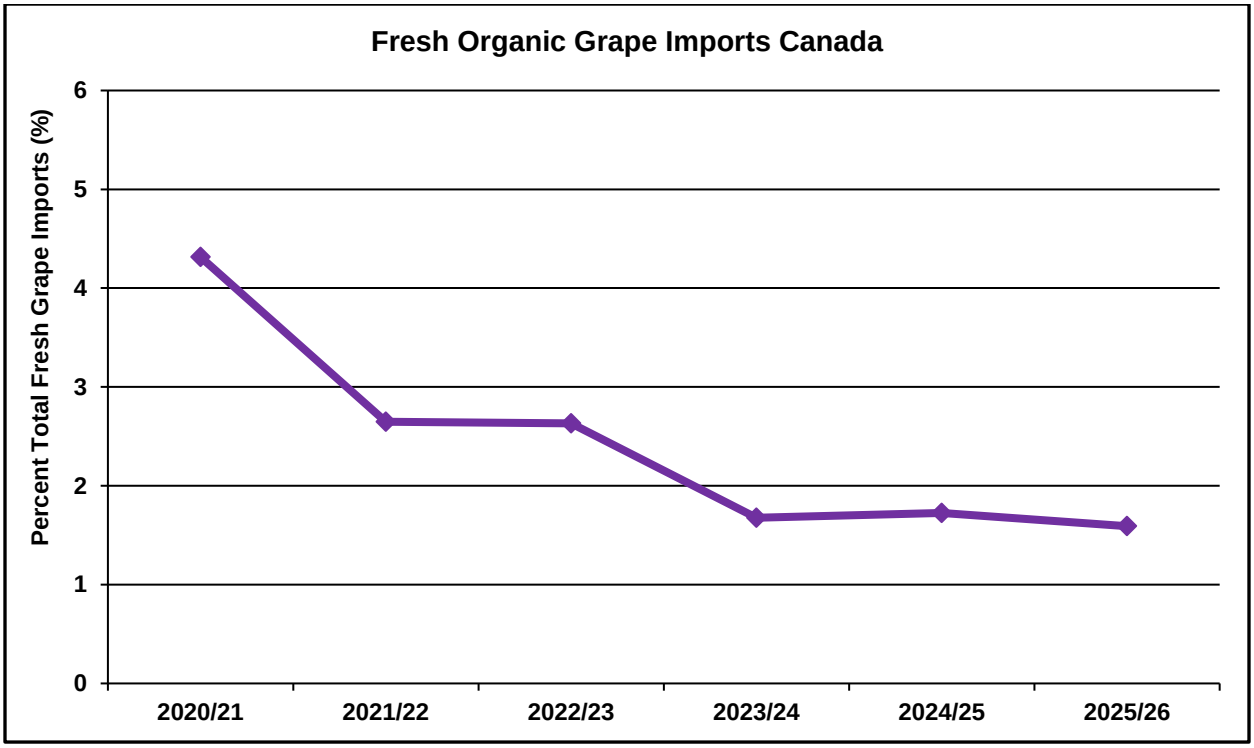
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
World	**191,893**	**186,448**	**178,149**	**178,639**	**204,953**	**194,316**
organic	8,280	4,940	4,686	2,993	3,534	3,092
other	183,098	180,988	172,897	175,187	196,391	185,922
United States	**88,944**	**85,514**	**79,010**	**65,183**	**82,398**	**76,783**
organic	5,906	3,302	3,291	1,768	2,197	1,785
other	82,556	81,713	75,299	63,039	79,140	73,459
CPTPP	76,544	75,446	80,216	86,066	91,892	95,591
Chile	27,743	28,165	26,076	29,887	30,607	32,646
Peru	23,859	26,947	35,174	29,659	38,276	40,681
South Africa	20,360	21,603	15,422	21,266	25,561	14,956
Mexico	24,942	20,332	18,951	26,495	22,981	22,259
All other countries	6,045	3,887	3,516	6,149	5,130	6,991
Import Market Shares						
United States	46.4%	45.9%	44.4%	36.5%	40.2%	39.5%
CPTPP	39.9%	40.5%	45.0%	48.2%	44.8%	49.2%
Chile	14.5%	15.1%	14.6%	16.7%	14.9%	16.8%
Peru	12.4%	14.5%	19.7%	16.6%	18.7%	20.9%
South Africa	11%	12%	9%	12%	12%	8%
Mexico	13.0%	10.9%	10.6%	14.8%	11.2%	11.5%

Source: Trade Data Monitor

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

Imports of organic fresh table grapes are likely to struggle in MY 2026/27. Given consumer price sensitivity, organic table grape imports are likely to face additional downward pressure in MY 2026/27. The United States supplies over half of Canada's imports of organic table grapes. Increased available could support MY 2026/27 imports. 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:

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.

Mexico

In February 2026, Canada's Canadian Food Inspection Agency (CFIA) announced that Mexico had updated its import requirements to make apples from Eastern Canadian provinces import eligible. With the new requirements, interested exporters in Ontario, Quebec, New Brunswick, and Nova Scotia must send apples to CFIA registered and inspected cold treatment facilities for export eligibility. CFIA states that this will eliminate the need for in-person inspections by Mexican officials.

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