United States Department of Agriculture
Foreign Agricultural Service

GAIN
Global Agricultural Information Network

Required Report: Required - Public Distribution

Date: December 02, 2025

Report Number: AR2025-0019

Report Name: Fresh Deciduous Fruit Annual

Country: Argentina

Post: Buenos Aires

Report Category: Fresh Deciduous Fruit

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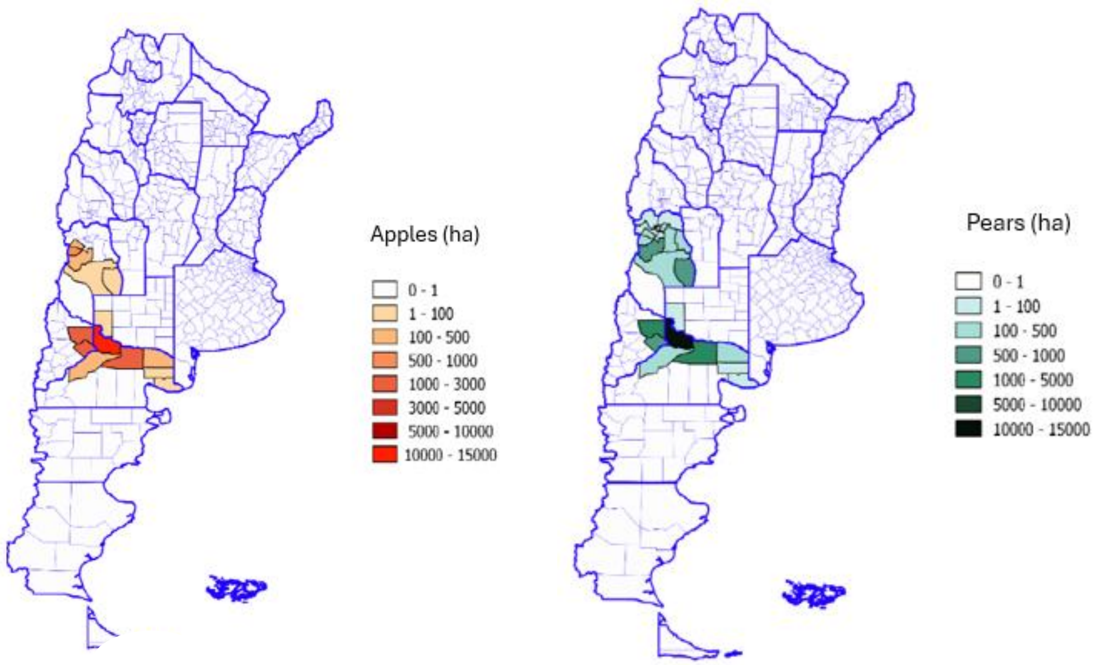
Report Highlights:

Argentina's Apple production in Marketing Year (MY) 2025/26 is projected to edge up to 528,000 metric tons (MT), while pear output is expected to remain steady at 658,000 MT, supported by favorable weather patterns and modest yield improvements. Apple exports are forecast to reach 86,000 MT as demand in key regional markets gradually strengthens, and pear exports are projected to hold firm at 345,000 MT.

Production

Río Negro province is the leading producer of apples and pears in Argentina, where dry climate, large day-night temperature range, and irrigation from the Limay and Neuquén rivers provide ideal conditions for color development and storage quality. Rio Negro province accounts for approximately 82 percent of the country's total production of apples and pears, Neuquén province follows with 15 percent, while the Uco Valley in Mendoza province contributes with the remaining 3 percent.

Map 1. Argentina Apple and Pear Production by Area



Source: SENASA

The number of apple and pear producers in Argentina has significantly declined in recent years. According to the National Food Safety and Quality Service (SENASA), there were about 9,000 producers in 2005, but by 2023, that number had dropped to just 1,605 producers. This sharp reduction can be attributed to multiple factors, including rising production costs, urbanization of agricultural areas, and an aging workforce. The remaining producers, however, tend to be larger and more financially resilient, with stronger integration across the value chain.

One of the primary reasons behind the decrease in producer numbers is the rising cost of production. Land, water, and labor expenses have surged in recent years, making it increasingly difficult for small scale producers to compete in domestic and international markets. The shrinking domestic market for apples and pears and declining international prices has also forced many small producers out of business.

Another major challenge is the aging workforce. Many skilled workers in apple and pear production are nearing retirement age, leading to a shortage of qualified labor, which has strained producers' ability to maintain operations. Moreover, urbanization has reduced the amount of land dedicated to fruit production, as real estate development has become more profitable in certain regions.

Despite these challenges, the remaining apple and pear producers have adapted by investing in new technologies and production methods, focusing on producing high-quality fruit for domestic and international markets. The sector is supported by a network of 260 packing plants and 220 cold storage facilities, which clean, sort, grade, package, and store the fruit. Approximately half of the sector's 60,000 direct-hire employees are seasonal migrant workers, primarily from the northern provinces, who travel to the region for the harvest, typically from November to March. The six largest fruit companies account for over 60 percent of total fruit exports. Some companies are vertically integrated with their production and only purchase from third parties as needed, which gives them a significant advantage over independent growers, who often struggle to sell their fruit when production is high.

Over the past eight years, approximately one-third of Argentina’s fruit growers have exited the industry, with small scale farmers disproportionately affected. Large scale producers, who account for only 2.5 percent of all fruit growers, control 60 percent of the land used for fruit production. On the other hand, small scale farmers, 75 percent of the agricultural population, own just 28 percent of the land, while mid-sized producers hold the remaining 12 percent. Most small and medium-sized growers rely on cooperatives to market and sell their production.

The recent consolidation of Argentina's apple and pear sector has created a need for increased investment in technological advancements, such as mechanization, improved logistics, and enhanced networks. However, such investments are unlikely in the near term due to persistently low prices and high production costs. Limited access to capital for reinvesting in orchard health and efficiency further prevents productivity improvements. Many orchards still grow older fruit varieties that are less competitive in the global market than the newer varieties produced by Chile and China, particularly in the apple sector. Increasing Argentina's efficiency and reducing production costs will be crucial for maintaining competitiveness in international markets.

Several ongoing challenges threaten the long-term viability of the industry. These include the government’s active management of the peso exchange rate, rising labor and energy costs, and the increasing price of refrigerated containers amid the global container shortage. According to industry sources, the estimated cost to plant a hectare with new fruit varieties, including hail protection and dual-purpose irrigation (for watering and frost prevention), is approximately USD $50,000. The production cost for apples and pears is estimated at USD 0.72 per kilogram, with 60 percent of this cost attributed to labor (40 percent for packing and 20 percent for production), and the remaining 40 percent allocated to capital, inputs, and services, including energy, transportation, packaging, and phytosanitary certifications.

Apples

The apple production cycle in Argentina can be summarized in the following stages:

Plant stage	Months	Main tasks
Winter dormancy	Jun–Aug	Pruning, pest control, maintenance
Blooming	Sep–Oct	Pollination, fertilization, frost protection
Fruit set & development	Nov–Jan	Thinning, irrigation, phytosanitary protection
Harvest	Feb–Apr	Manual harvest, grading, transport to packing facilities
Postharvest	Apr–Jun	Storage, packing, export logistics

For MY 2025/26, fresh apple production in Argentina is forecast to increase to 528,000 MT. This slight increase from the previous year is attributed to favorable weather patterns, resulting in better yields.

Varieties
The primary apple varieties cultivated in Argentina are Red Delicious, Granny Smith, and Gala. Collectively, these three varieties comprise almost 90 percent of the country's apple production. Planted area of Red Delicious has gradually declined, replaced by newer, more productive varieties. The Gala variety is experiencing a strong expansion due to better yields, color, and early market entry compared to newer varieties. The Granny Smith variety continues to have stable demand due to versatility and longer storage life.

Pears

The pear production cycle in Argentina can be summarized in the following stages:

Plant stage	Months	Main tasks
Winter dormancy	Jun–Aug	Pruning, pest and disease control, orchard maintenance
Blooming	Sep–Oct	Pollination, fertilization, frost protection
Fruit set & development	Nov–Jan	Thinning, irrigation management, pest and disease monitoring
Harvest	Feb–Mar	Manual harvest, grading, transport to packing facilities
Postharvest	Mar–Jun	Cold storage, packing, export logistics

For MY 2025/26, Post forecasts fresh pear production at 658,000 MT. Benefiting from favorable, frost-free weather conditions, Post raises its pear production estimated to increase to 657,000 MT for MY 2024/25 from Post’s previous estimate.
Post’s MY 2023/24 pear production estimate remains unchanged at 658,000 MT, in line with USDA estimates.

Varieties
Argentina continues to grow a handful of pear varieties, with few significant developments in recent years due to the tight economic constraints faced by producers, which limits their ability to experiment with new varieties. The Williams variety continues to dominate, accounting for 45 percent of cultivated areas and pear exports. Following closely is Packham variety, representing one-third of the market share with 35 percent share, while the D'Anjou variety holds a 15 percent share. The Abate variety accounts for just 5 percent of the market.

Organic Production
In Marketing Year (MY) 2025/26, the certified organic apple and pear orchards in the provinces of Río Negro and Neuquén covered an area of 5,500 hectares, unchanged from previous years.
Despite the higher production costs associated with organic farming, such as manual pruning, biological weed control, and certification fees, producers expect the area dedicated to organic production to remain stable in the coming years supported by sustained demand for organic products.

Planted Area
The area planted to apples and pears in MY 2025/26 is forecasted at 17,500 hectares for apples and 19,000 hectares for pears, with no changes from previous MY year. This is based on the expectation of maintaining last year's demand for both fruits.

In MY 2025/26, the harvested area for apples is forecast at 16,700 hectares. The harvested area for pears is predicted to be 17,500 hectares, unchanged from MY 2024/25.

Rising production costs remain a primary constraint limiting the expansion of apple and pear orchards in Argentina. Expenses for land, labor, and key production inputs, including fertilizers and pesticides, have increased substantially in recent years, reducing profitability for many growers. Furthermore, limited access to international markets continues to pose a significant challenge. Argentina’s geographic distance from major export destinations, combined with high transportation and logistics costs, has made it increasingly difficult for small and medium scale producers to sustain orchard operations. As a result, several growers have either abandoned their orchards or shifted to alternative crops.

Another critical factor is the persistently low apple prices and pears on the global market. International competition in the fruit sector is fierce, and prices have remained stagnant for many years. This has put considerable financial pressure on Argentine growers, some of whom have opted to sell their land to larger producers or industries such as oil and gas.

Domestic Consumption

Domestic consumption of fresh apples is forecast to reach 444,000 MT in MY 2025/26, similar to the 442,000 MT estimated for MY 2024/25. Over the past decade, per capita consumption has fluctuated between 6 and 7.7 kg per person per year, showing a significant decline compared to the 1990s, when it averaged 12 kg per person per year. This trend reflects a combination of factors, including greater availability of alternative fruits, increased competition from imported tropical fruits such as bananas, and shifts in consumer preferences toward more convenient and processed food options. Additionally, the highest-quality fruit is typically directed at export markets, leaving lower-grade apples for domestic consumption, which has decreased local demand. Economic pressures and changing dietary habits have further contributed to the downward trend in fresh apple consumption.

The most consumed variety is Red Delicious, which accounts for over 80 percent of total domestic consumption. Other popular varieties include Granny Smith, accounting for 15 percent of total consumption, and Gala, which accounts for 5 percent of total consumption.

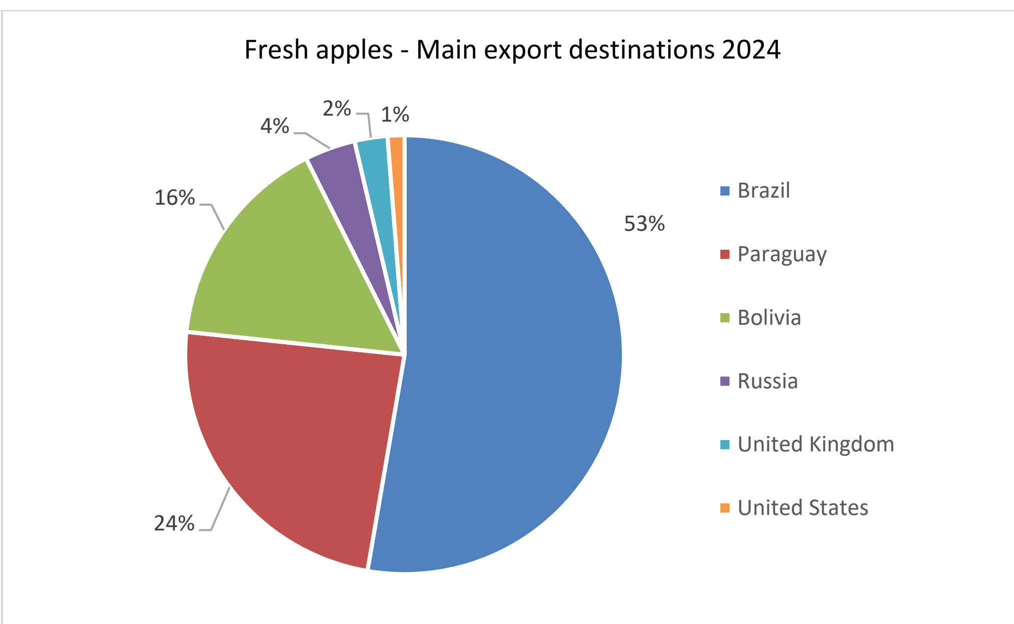
Fresh pear consumption is estimated at 313,500 MT for MY 2025/26, a slight increase from the previous MY 2024/25, which is estimated at 310,500 MT. In the past ten years, per capita consumption has averaged 2.5 kg per person per year, below historical levels. Several factors explain this trend, including strong competition from other fruits with higher year-round availability and lower prices. Moreover, limited promotion of pears in the domestic market and the concentration of premium quality fruit in export channels have reduced local consumer exposure to high-quality products.
The most consumed varieties in the domestic market are Williams, which accounts for 60 percent of total consumption, and Packhams, accounting for the remaining 40 percent.

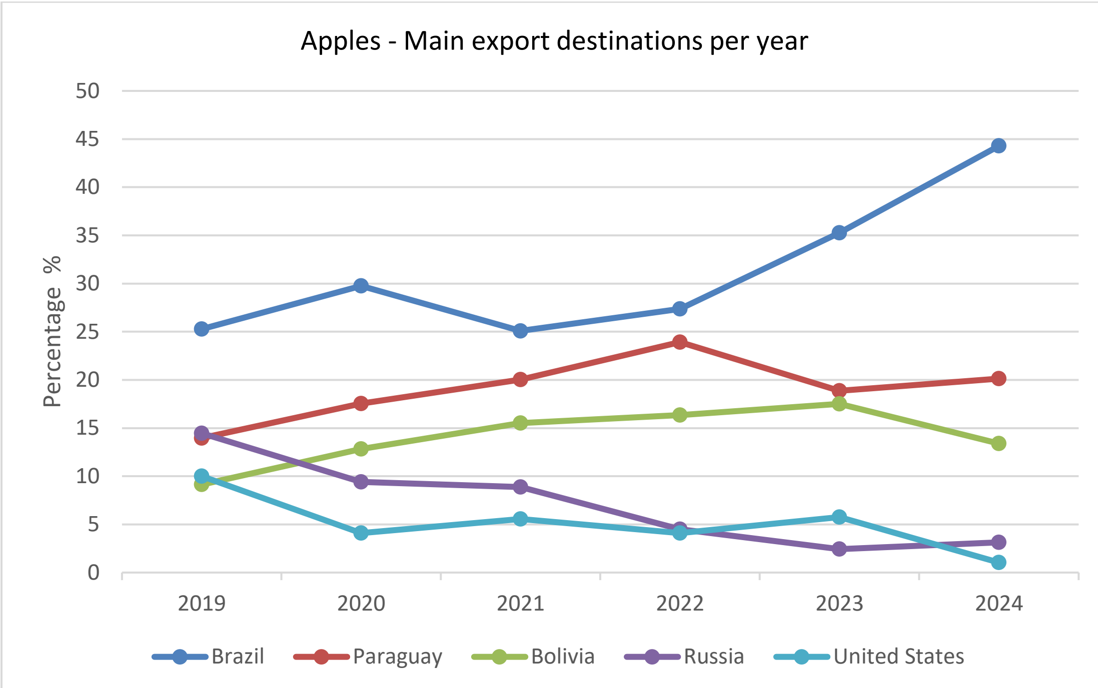
Organic Consumption
In recent years, the popularity of fresh organic products has shown an upward trend in affluent areas within Buenos Aires and other major cities in the interior of Argentina. However, due to higher prices, domestic demand for organic products remains relatively low compared to that of northern hemisphere markets.

Fresh organic produce is sold in high-end supermarkets and health food stores, targeting upscale consumers. In addition, food manufacturers are increasing the volume of organic fruit in their processed products, such as cereal bars and organic juices.

Trade

Exports

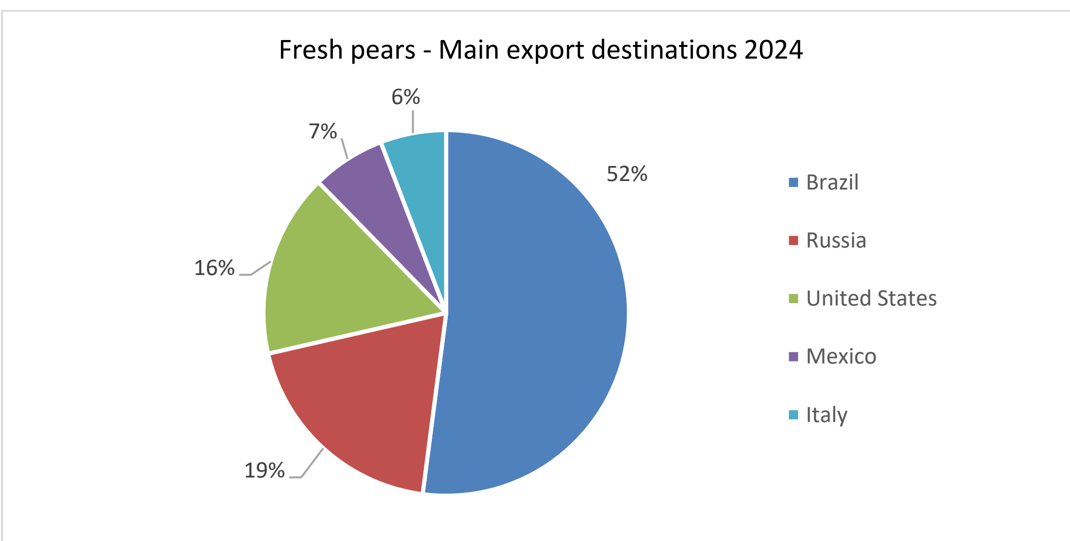


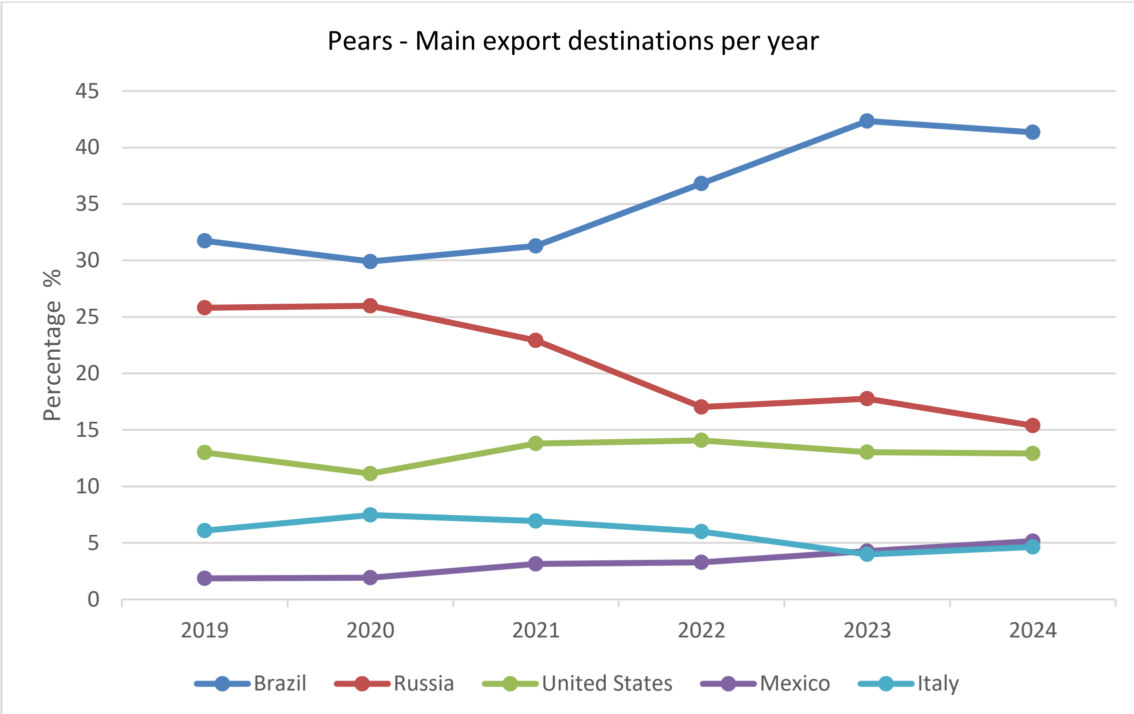


Source: FAS Buenos Aires based on data from Trade Data Monitor, Inc.

Apple exports are expected to rise to 86,000 MT for MY 2025/26 due to an increased demand from Latin American countries, such as Brazil, Paraguay and Bolivia.

Between 2019 and 2024, Brazil consolidated its role as Argentina's main export market for fresh apples, with its share increasing sharply from around 25 to 45 percent. Paraguay has continued to grow as the second largest export market with a more moderate upward trend until 2022, stabilizing near 20 percent in recent years. In contrast, exports to Bolivia continue to decline, while shipments to Russia and the United States remained below 10 percent.





Source: FAS Buenos Aires based on data from Trade Data Monitor, Inc.

Pear exports for MY 2025/26 are expected at 345,000 MT, a slight increase from previous year. Brazil remains the top export market, accounting for 52 percent of the market share. Russia is the second export market destination, accounting for 19 percent of the market share.

Between 2019 and 2024, Brazil also strengthened its position as the leading destination for Argentine pear exports, increasing its share from 32 to 43 percent. At the same time exports to Russia declined steadily, dropping from approximately 26 to below 20 percent over the same period. Shipments to the United States and Italy remained relatively stable, while Mexico continued to represent a small but consistent share of total exports.

Imports
As a significant producer and exporter of fresh apples and pears, imports of both fruits are negligible. Consequently, in MY 2025/26, fresh apple imports are forecast to remain unchanged from the last official estimate, reaching 2,000 MT. Chile is the main supplier of imported apples, accounting for 97 percent of Argentina's imports.

Fresh pear imports in MY 2025/2026 are expected to reach 500 MT, with a slight increase from the previous MY, mainly due to pears imported from China.

Apple and pear imports in MY 2024/25 remained unchanged from official estimates at 3,000 MT and 300 MT, respectively, following USDA estimates.

Policy
In 2024 The Argentine government implemented a liberalized import regime, removing many of the restrictive controls that had previously limited trade. While this policy shift potentially opens up

competition in the domestic market from more imported fruits, it also created new opportunities to incorporate foreign technologies, improved fruit varieties, agrochemicals, fertilizers, machinery, and packaging materials, which are key factors for enhancing productivity and competitiveness in both domestic and export markets.

Despite these structural changes and some tax reductions, the fruit sector continues to face high production and logistics costs. The removal of national energy subsidies in early 2024 further increased storage and operating costs, leading many producers to prioritize only premium quality fruit for cold storage, while lower grade fruit is often sold at reduced prices or discarded. Independent growers remain particularly vulnerable, facing difficulties competing with vertically integrated companies and managing post-harvest storage under high fixed cost conditions.

In parallel with these economic measures, Argentina maintains a robust phytosanitary framework for its deciduous fruit sector, administered by the National Food Safety and Quality Service (SENASA). Apple and pear exports are subject to strict sanitary and traceability controls to ensure compliance with international standards. The primary phytosanitary concern remains the codling moth (*Cydia pomonella*), which requires field certification, integrated pest management, and cold treatment prior to export. Other key priorities include preserving fire blight (*Erwinia amylovora*) free status, managing postharvest fungal diseases such as *Penicillium* and *Botrytis*, and meeting maximum residue limit (MRL) requirements established by destination markets.

Patagonia's continued recognition as a fruit-fly-free area is essential to maintaining access to premium markets, including the United States, the European Union, and Brazil. Through the Fruta Fina Patagónica Program, SENASA supervises traceability systems, packinghouse inspections, and export certification, ensuring that Argentine fruit meets international quality and safety standards. This integrated regulatory approach, linking economic liberalization with strengthened sanitary oversight, aims to enhance Argentina's long-term competitiveness and preserve its reputation as a reliable counter seasonal supplier of high-quality deciduous fruit.

Phytosanitary issue	Status in Argentina	Trade impact	Main Control/Requirement
Codling moth (*Cydia pomonella*)	Present, under control	Major	IPM, cold treatment, field certification
Fire blight (*Erwinia amylovora*)	Absent	High risk	Official freedom declaration
Fruit fly (*Ceratitis capitata*)	Eradicated in Patagonia	Crucial for exports	Area-free certification
Fungal diseases (*Penicillium*, *Botrytis*, *Alternaria*)	Present	Quality & rejection risk	Postharvest treatments, GAP
Chemical residues	Regulated	Export rejections	MRL monitoring & control

Source: SENASA

Import and Export Regulations

Table 1: Tariffs, taxes, and rebates for Argentine fresh apples and pears

Tariffs, taxes, and rebates for Fresh apples (0808.10) & fresh pears (0808.30)	
Import Tariff (percentage) from outside Mercosur	9
Statistical Tax (percentage) applies to Imports	3
Export tax (percentage)	0
Apples Export Rebate (percentage)	3.75
Pears Export Rebate (percentage)	3.5
Additional Export Rebate for Organic Fruit for apples & pears (percentage) (*)	0.5

Source: FAS Buenos Aires based on data from VUCE.

(*) All export rebates apply equally within and outside Mercosur.

Note: All tariffs and taxes apply equally to apples and pears. Export rebates differ for both fruits.

Imports

Imports of fresh apples and fresh pears from countries outside Mercosur are subject to a 9 percent import tariff in addition to a 3 percent statistical tax, which serves as a regulatory instrument to monitor trade flows and manage fiscal revenue.

Exports

Export taxes are not applied to these commodities, reflecting the government's policy to maintain incentives for outbound shipments. To enhance the competitiveness of Argentine deciduous fruits in international markets, the government provides a restitution mechanism, consisting of an export rebate of 3.75 percent for apples and 3.5 percent for pears. An additional 0.5 percent rebate is granted for certified organic fruit, further promoting higher-value and niche market segments. Collectively, these measures aim to offset domestic production costs and logistical expenses, stimulate export performance, and support the sector's strategic positioning in premium and organic markets, while maintaining compliance with trade and fiscal regulations.

In April 2025, the United States government announced a significant shift in trade policy, applying a 10 percent baseline tariff on all imports to the United States. This policy shift has had notable implications for Argentine exports, including apples and pears. The imposition of the 10 percent tariff increases the cost of Argentine products in the U.S. market, potentially reducing their competitiveness relative to domestic and other foreign suppliers. In response, the Argentine government has engaged in diplomatic discussions with U.S. officials, seeking to negotiate the removal or reduction of these tariffs. Despite these efforts, as of October 2025, the 10 percent tariff remains in effect for Argentine exports.

Prices

Retail prices of Argentine apples and pears (USD$/kg):

Fruit	Variety	Price (USD$/Kilogram)
Pears	Packham's	$2,82
	Williams	$2,12
Apples	Pink Lady	$2,10
	Red Delicious (standard)	$2,47
	Granny Smith	$2.80
	Rome Beauty	$2.50

Source: Survey of supermarkets and grocery stores in the city of Buenos Aires
Note: Official rate as of October 20, 2025, USD$ 1 = ARS$ 1,415

Wholesale prices of Argentine apples and pears (USD$/kg):

Fruit	Variety	Price (USD$/Kilogram)
Pears	Packham's	$1,41
	Williams	$1,15
Apples	Pink Lady	$1,02
	Red Delicious (standard)	$1,06
	Granny Smith	$0,90

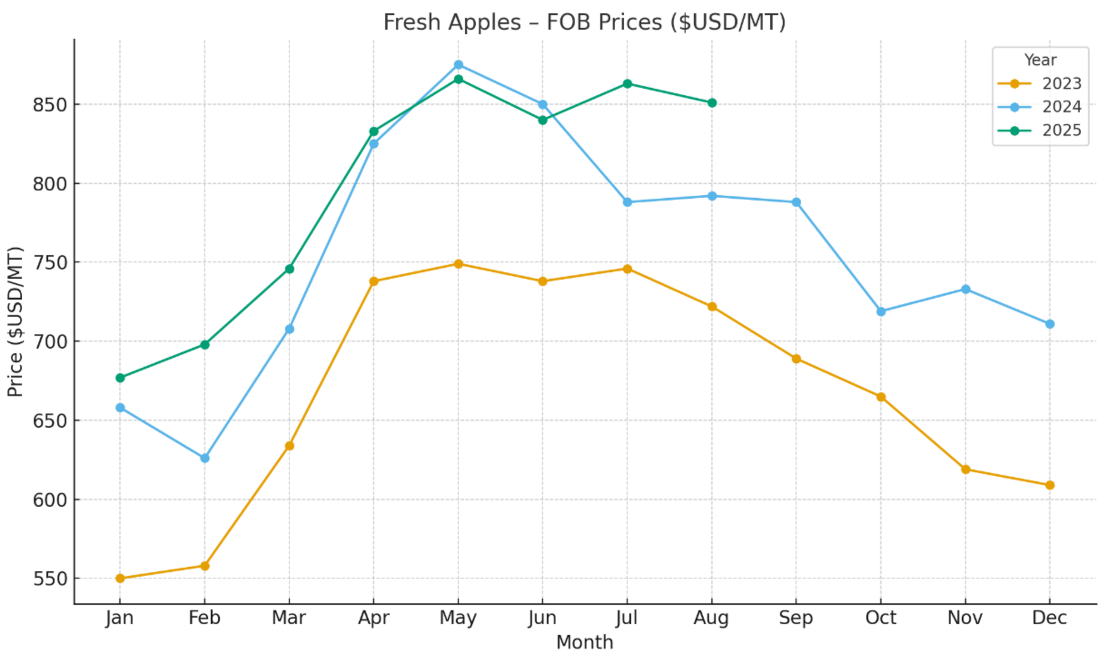
	Rome Beauty	$1,02

Source: Mercado central of Buenos Aires, Argentina.
Note: Official rate as of October 20, 2025, USD$ 1 = ARS$ 1,415

Free-on-Board (FOB) prices
FOB Export prices for Argentine apples:

Fresh Apples – FOB Prices (USD$/MT)			
Month	**2023**	**2024**	**2025**
Jan	$ 550	$ 658	$ 677
Feb	$ 558	$ 626	$ 698
Mar	$ 634	$ 708	$ 746
Apr	$ 738	$ 825	$ 833
May	$ 749	$ 875	$ 866
Jun	$ 738	$ 850	$ 840
Jul	$ 746	$ 788	$ 863
Aug	$ 722	$ 792	$ 851
Sep	$ 689	$ 788	-
Oct	$ 665	$ 719	-
Nov	$ 619	$ 733	-
Dec	$ 609	$ 711	-
Avg	**$ 668**	**$ 756**	**$ 797**

Source: FAS Buenos Aires based on data from Trade Data Monitor, Inc.



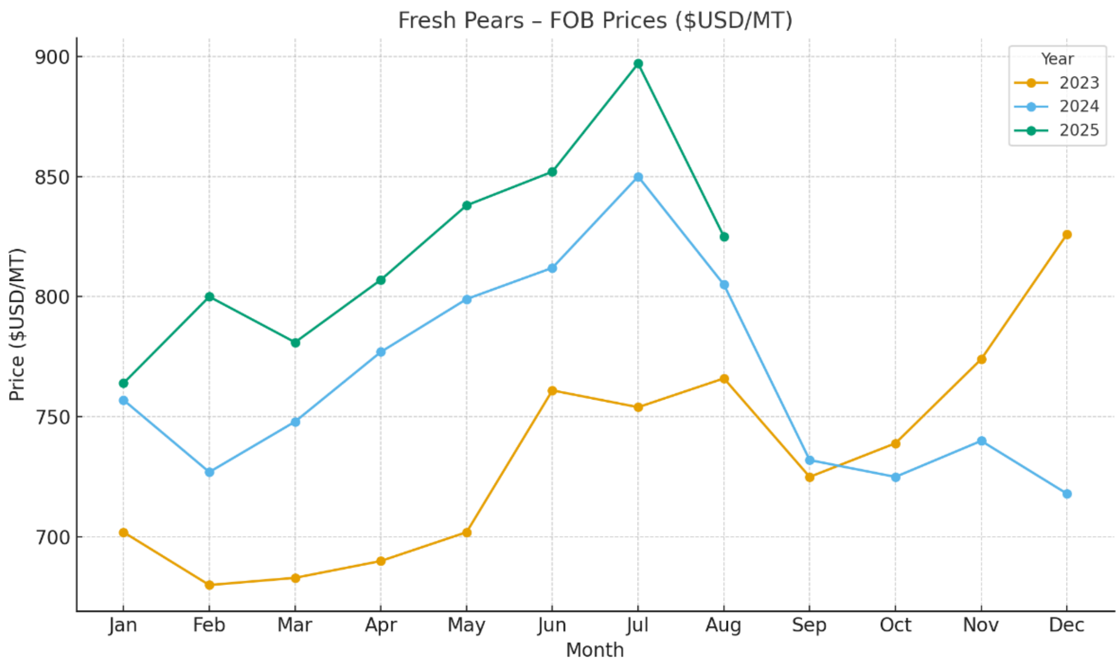
FOB export prices for Argentine fresh apples have continued to strengthen over the past three years. Average export values increased from $668/MT in 2023 to $756/MT in 2024, showing a 13 percent increase, and are trending even higher in 2025, averaging $797/MT for the January-August period. The upward trend reflects higher demand in key export markets, combined with limited southern hemisphere supply and higher production and logistics costs that continue to be passed along to buyers. Seasonal dynamics remain consistent, with the highest prices recorded during March-May period, which is the peak of Argentina's export season, since counter seasonal fruit faces less competition from northern hemisphere suppliers. In April 2025, prices reached $833/MT, well above 2023 levels, though slightly below the record highs of 2024. As in previous years, prices begin to soften from September onward, matching the increased availability of northern hemisphere fruit.

Argentine apples are achieving progressively higher prices in export markets, with 2025 set to mark the strongest performance in recent years. While competition later in the year continues to pressure prices, early season shipments remain highly competitive, underscoring Argentina's strategic role as a counter seasonal supplier to global markets.

FOB Export prices for Argentine pears:

Fresh Pears – FOB Prices (USD$/MT)			
Month	**2023**	**2024**	**2025**
Jan	$ 702	$ 757	$ 764
Feb	$ 680	$ 727	$ 800
Mar	$ 683	$ 748	$ 781
Apr	$ 690	$ 777	$ 807
May	$ 702	$ 799	$ 838
Jun	$ 761	$ 812	$ 852
Jul	$ 754	$ 850	$ 897
Aug	$ 766	$ 805	$ 825
Sep	$ 725	$ 732	-
Oct	$ 739	$ 725	-
Nov	$ 774	$ 740	-
Dec	$ 826	$ 718	-
Avg	**$ 734**	**$ 736**	**$ 821**

Source: FAS Buenos Aires based on data from Trade Data Monitor, Inc.



FOB export prices for Argentine pears show a strong upward trend in 2025, following two years of relative stability. Average export values were $734/MT in 2023 and $736/MT in 2024 but surged to $821/MT in 2025 for the January-August period. This sharp rise points to firm international demand, reduced export availability, and higher production and shipping costs being successfully transferred to buyers.

Seasonally, pear prices are more stable than apples but follow a similar pattern, with steady gains through the first half of the year and the highest values seen in mid-season. In 2025, prices reached $838/MT in May and continued to strengthen through July, when they peaked at $897/MT, the highest level observed in the past three years. Unlike apples, pear prices have held up well even into mid-year, suggesting strong and sustained demand across key markets.

The overall trend underscores Argentina's solid positioning as a reliable counter-seasonal supplier of pears, with 2025 marking a significant improvement in export returns. Early and mid-season shipments are achieving robust premiums compared to previous years, reinforcing pears as one of Argentina's most competitive fresh fruit exports.

Production, Supply, and Demand Statistical Tables

Apples, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jan 2024		Jan 2025		Jan 2026	
Argentina	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	18000	18000	17500	17500	0	17500
Area Harvested (HA)	17000	17000	16700	16700	0	16700
Bearing Trees (1000 TREES)	16700	16700	16500	16500	0	16500
Non-Bearing Trees (1000 TREES)	400	400	400	400	0	400
Total Trees (1000 TREES)	17100	17100	16900	16900	0	16900
Commercial Production (MT)	485000	485000	488000	525000	0	528000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	485000	485000	488000	525000	0	528000
Imports (MT)	3000	3000	3000	2000	0	2000
Total Supply (MT)	488000	488000	491000	527000	0	530000
Domestic Consumption (MT)	410000	410000	409000	442000	0	444000
Exports (MT)	78000	78000	82000	85000	0	86000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	488000	488000	491000	527000	0	530000
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query]						

Pears, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jan 2024		Jan 2025		Jan 2026	
Argentina	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	19000	19000	19000	19000	0	19000
Area Harvested (HA)	18260	18260	17500	17500	0	17500
Bearing Trees (1000 TREES)	14200	14200	14200	14200	0	14200
Non-Bearing Trees (1000 TREES)	600	600	600	600	0	600
Total Trees (1000 TREES)	14800	14800	14800	14800	0	14800
Commercial Production (MT)	658000	658000	655000	657000	0	658000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	658000	658000	655000	657000	0	658000
Imports (MT)	300	300	300	500	0	500
Total Supply (MT)	658300	658300	655300	657500	0	658500
Domestic Consumption (MT)	323300	322300	325300	310500	0	313500
Exports (MT)	335000	336000	330000	347000	0	345000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	658300	658300	655300	657500	0	658500
(HA) ,(1000 TREES) ,(MT)						

Attachments:

No Attachments

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