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Report Highlights:

Argentina's fresh apple and pear production is forecast to decline slightly in marketing year (MY) 2026/27 to 523,000 metric tons (MT) and 655,000 MT, respectively, as a developing El Niño raises concerns about excessive rainfall during the growing season. Fresh pear exports are forecast at 345,000 MT, while apple exports are expected to remain relatively stable, supported by demand from regional markets, particularly Brazil. Rising production and labor costs, limited access to financing, and high transportation costs continue to constrain profitability and discourage investment in orchard modernization. Industry consolidation continues as smaller growers struggle to remain competitive, while larger, vertically integrated operations account for an increasing share of production and exports.

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Production

Apples

Post forecasts Argentine fresh apple production for marketing year (MY) 2026/27 at 523,000 metric tons (MT), slightly below the previous marketing year, as potential adverse effects from El Niño may decrease weigh on yields slightly. Production for MY 2025/26 remains unchanged from Post's last update at 538,000 MT.

Argentina Apple Production Cycle

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

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. Red Delicious production 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

For MY 2026/27, Post forecasts Argentine fresh pear production at 655,000 MT, slightly below the 658,000 MT estimated for MY 2025/26. The modest decline compared with the previous marketing year reflects potential weather-related challenges associated with El Niño, which could affect growing conditions and yields. Post's MY 2025/26 production estimate remains unchanged from Post's previous update, in line with USDA estimates.

Argentina Pear Production Cycle

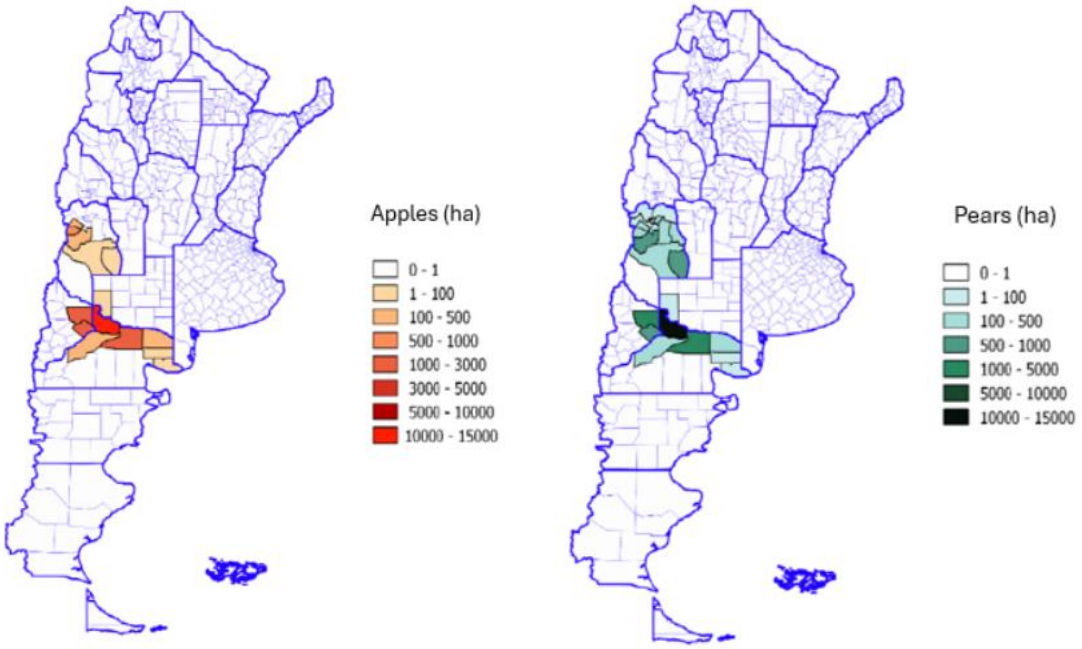
Plant stage	Months	Main tasks
Winter dormancy	Jun–Aug	Pruning, pest and disease control, orchard maintenance
Blooming	Sep–Oct	Pollination, fertilization, frost protection
Fruit set & development	Nov–Jan	Thinning, irrigation management, pest and disease monitoring
Harvest	Feb–Mar	Manual harvest, grading,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

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 area and pear exports. Following closely is the 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.

Production Trends

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: National Food Safety and Quality Service (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 only 1,605 by 2025. This sharp reduction can be attributed to multiple factors, including rising production costs, urbanization of production 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. In some fruit-producing regions, expanding urban development has reduced the amount of land available for orchards, as landowners increasingly find it more profitable to sell their land for residential or commercial development.

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 industry 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, most of them small scale farmers. 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 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.
According to Post 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 US$ 50,000. The production cost for apples and pears is estimated at US$ 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.

El Niño Event
Argentina's apple and pear crops are off to a promising start for MY 2026/27, with sufficient winter chill and good soil moisture supporting early crop development. However, forecasts of a developing El Niño raise concerns about excessive rainfall during the growing season, which could reduce fruit set, increase disease pressure, and raise production costs.

In Argentina’s key agricultural regions, including the Upper Valley of Río Negro and Neuquén, El Niño can be associated with increased spring rainfall and persistent cloud cover. Excessive precipitation during the critical bloom period may interfere with pollination and fruit formation, while also washing off crop protection products, requiring additional applications and increasing production costs. A strong to very strong El Niño is expected to persist through January-March 2027.

Organic Production
In Marketing Year (MY) 2026/27, 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 continued demand for organic products.

Planted Area
The area planted to apples and pears in MY 2026/27 is forecasted at 17,500 hectares for apples and 19,000 hectares for pears, with no changes from previous year. This is based on the expectation of maintaining last year's demand for both fruits.

In MY 2026/27, the harvested area for apples is forecast at 16,700 hectares with pear harvested area at 17,500 hectares, unchanged from MY 2025/26.

Rising production costs and declining profitability continue to discourage investment in Argentina’s apple and pear industry. Higher land prices, labor costs, and expenses for inputs such as fertilizers and pesticides have put increasing pressure on growers' margins. At the same time, Argentina's distance from major export markets and high transportation costs make it difficult for producers to compete internationally, particularly smaller operations. With little incentive to invest in new orchards or maintain existing ones, some growers have abandoned production or switched to other 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 the booming oil and gas sectors.

Domestic Consumption

Domestic consumption of fresh apples is forecast to reach 441,000 MT in MY 2026/27, similar to the 444,000 MT estimated for MY 2025/26.

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 310,500 MT for MY 2026/27. In the past ten years, per capita consumption has averaged 2.5 kg per person per year, below historical levels. Competition from other fruits with higher year-round availability and lower prices have also contributed to this lower pear consumption. Moreover, limited promotion of pears in the domestic market and the premium quality fruit sent to export markets 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 increased 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.

Policy

Argentina's easing of import restrictions has improved access to imported machinery, agricultural inputs, and technology, potentially helping apple and pear growers reduce costs and improve productivity. However, high production and transportation costs continue to weigh on profitability. Higher energy prices have also made cold storage more expensive, prompting growers to prioritize higher-quality fruit for storage and marketing. Smaller, independent producers remain particularly vulnerable to these pressures.

In parallel with these economic measures, Argentina maintains a robust phytosanitary framework for its deciduous fruit sector, administered by 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 Argentina’s access to premium markets, including the United States, the European Union, and Brazil. SENASA supervises traceability systems, packinghouse inspections, and export certification, ensuring that Argentine fruit meets international quality and safety standards. This integrated regulatory approach aims to preserve its reputation as a reliable counter seasonal supplier of high-quality deciduous fruit.

Investments

Limited investment continues to hold back modernization of Argentina's apple and pear industry. Many growers cannot afford to replace aging orchards with newer varieties or invest in equipment and production systems that would improve efficiency. This is particularly problematic for apple producers, who face growing competition from countries such as Chile that have invested more heavily in modern orchards.

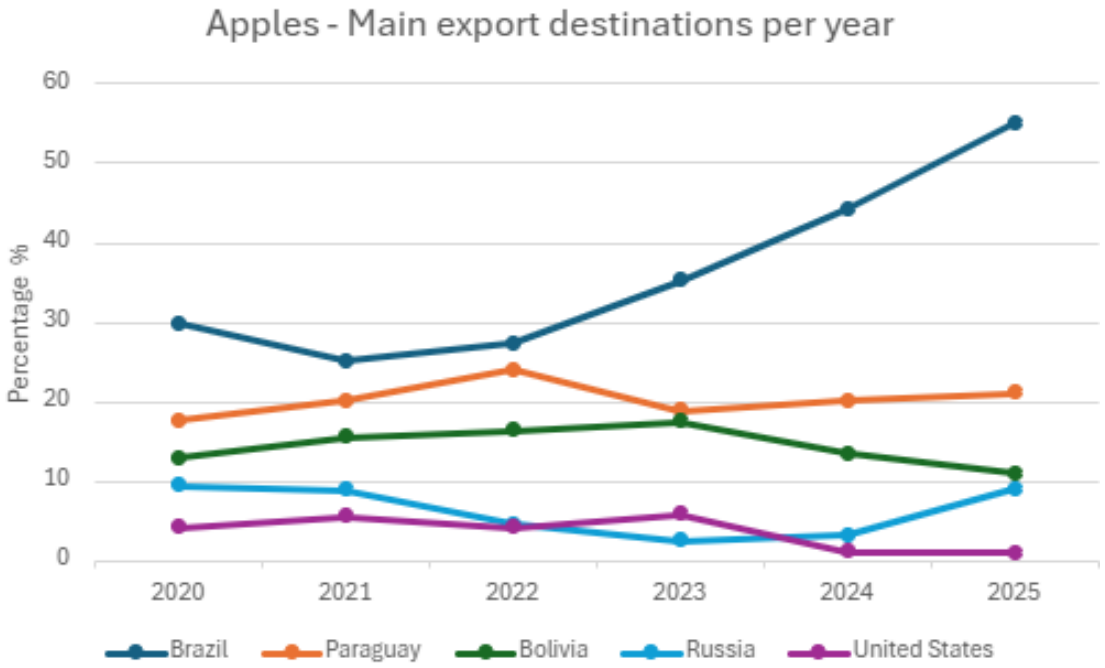
Argentina Phytosanitary Trade Issues

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

Trade

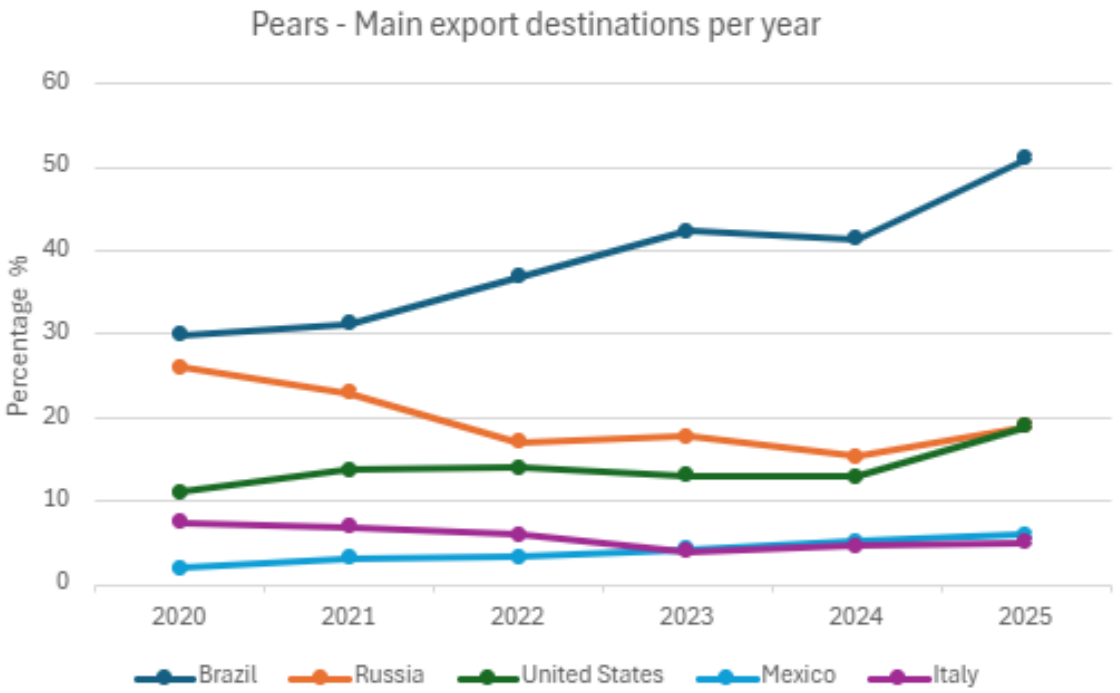
Exports



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

Argentine fresh apple exports are forecast to remain stable at 84,000 MT in MY 2025/26, supported by steady demand from key Latin American markets, including Brazil, Paraguay, and Bolivia.

Between 2019 and 2025, Brazil strengthened its position as Argentina's leading export market for fresh apples, with its share of total exports increasing from approximately 25 percent to 55 percent. Paraguay remained the second-largest destination, with its share rising moderately through 2022 before stabilizing at around 20 percent in recent years. In contrast, Bolivia's share declined over the period, while Russia and the United States each accounted for less than 10 percent of Argentine fresh apple exports.



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

Argentine fresh pear exports for MY 2026/27 are forecast at 345,000 MT. Brazil is the leading export destination, accounting for 51 percent of total exports, followed by Russia and the United States, each representing 19 percent.

Between 2019 and 2025, Brazil strengthened its position as the main destination for Argentine fresh pear exports, with its share increasing from 32 to 51 percent. In contrast, Russia's share declined steadily, from approximately 26 percent to less than 20 percent over the same period. The shares of the United States and Italy remained relatively stable, while Mexico continued to account for a small but consistent share of total exports.

Imports

As a major producer and exporter of fresh apples and pears, Argentina imports negligible quantities of both fruits. For MY 2026/27, fresh apple imports are forecast at 2,000 MT, unchanged from the previous official estimate. Chile is the main supplier, accounting for 97 percent of Argentina's apple imports. Fresh pear imports are forecast at 500 MT in MY 2026/27, with China serving as the main supplier. Import estimates for MY 2025/26 remain unchanged at 2,000 MT for fresh apples and 500 MT for fresh pears, in line with USDA estimates.

Import and Export Regulations

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
Fresh apples and pears imported from countries outside Mercosur are subject to a 9 percent import tariff and an additional 3 percent statistical tax.

Exports
Argentina does not impose export taxes on apples or pears and provides export rebate of 3.75 percent for apples and 3.5 percent for pears, with an additional 0.5 percent for certified organic fruit. These rebates help offset production and transportation costs and improve the competitiveness of Argentine fruit in international markets.

In April 2025, the United States announced a 10 percent baseline tariff on all imports to the United States. This had notable implications for Argentine exports, including apples and pears. The 10 percent U.S. tariff raises the cost of Argentine products in the U.S. market. Argentina held discussions with U.S. officials regarding a possible reduction or elimination of the tariff. However, as of October 2026, the 10 percent tariff remains in effect for Argentine exports.

Prices

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

Fruit	Variety	Price (US$/Kilogram)
Pears	Packham's	$2,27
	Williams	$2,84
Apples	Pink Lady	$2,27
	Red Delicious (standard)	$2,21
	Granny Smith	$2,92
	Rome Beauty	$2,55

Source: Survey of supermarkets and grocery stores in the city of Buenos Aires
Note: Official rate as of October 22, 2026, USD$ 1 = ARS$ 1,540

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

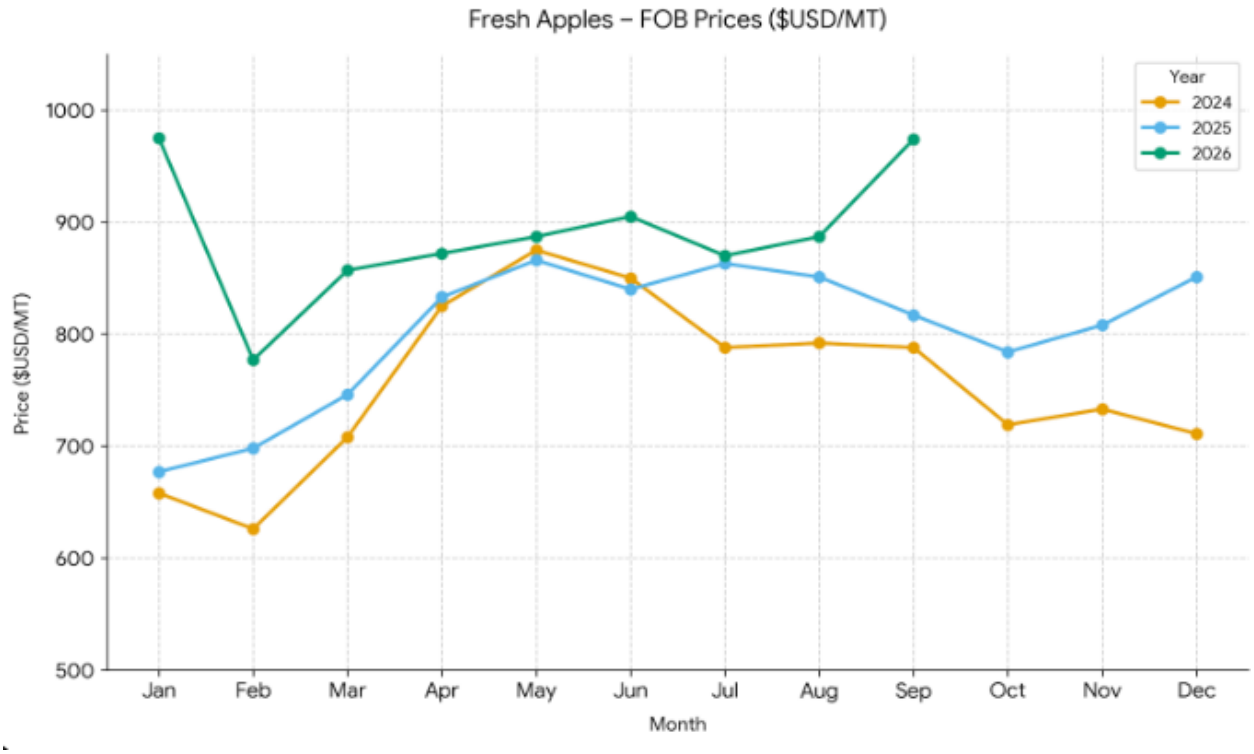
Fruit	Variety	Price (US$/Kilogram)
Pears	Packham's	$1,56
	Williams	$1,70
Apples	Pink Lady	$1,29
	Red Delicious (standard)	$1,58
	Granny Smith	$1,67
	Rome Beauty	$1,22

Source: Mercado central of Buenos Aires, Argentina.
Note: Official rate as of October 22, 2026, USD$ 1 = ARS$ 1,540

FOB Prices

Fresh Apples – FOB Prices (US$/MT)			
Month	**2024**	**2025**	**2026**
Jan	$ 658	$ 677	$ 975
Feb	$ 626	$ 698	$ 777
Mar	$ 708	$ 746	$ 857
Apr	$ 825	$ 833	$ 872
May	$ 875	$ 866	$ 887
Jun	$ 850	$ 840	$ 905
Jul	$ 788	$ 863	$ 870
Aug	$ 792	$ 851	$ 887
Sep	$ 788	$ 817	$ 974
Oct	$ 719	$ 784	-
Nov	$ 733	$ 808	-
Dec	$ 711	$ 851	-
Avg	**$ 756**	**$ 815**	**$ 889**

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



FOB prices for Argentine fresh apples trended upward from 2024 through September 2026, despite monthly fluctuations. Prices generally increased during the first half of the year, coinciding with Argentina's main export season, before easing or stabilizing in some months. Seasonal changes in export supplies and demand in major markets have contributed to this process, while rising production and transportation costs have put additional pressure on exporters.

Fresh Pears – FOB Prices (US$/MT)			
Month	**2024**	**2025**	**2026**
Jan	$ 757	$ 764	$ 1,127
Feb	$ 727	$ 800	$ 894
Mar	$ 748	$ 781	$ 862
Apr	$ 777	$ 807	$ 892
May	$ 799	$ 838	$ 895
Jun	$ 812	$ 852	$ 905
Jul	$ 850	$ 897	$ 945
Aug	$ 805	$ 825	$ 912
Sep	$ 732	$ 846	$ 960
Oct	$ 725	$ 987	-
Nov	$ 740	$1,130	-
Dec	$ 718	$1,231	-
Avg	**$ 736**	**$ 896.5**	**$ 960.16**



FOB prices for Argentine fresh pears followed also rose from 2024 through September 2026. Higher prices reflect tighter supplies of export-quality fruit, as well as elevated production, labor, and shipping costs. Previous hail and frost events also affected fruit availability contributing to higher prices.

Production, Supply, and Demand Statistical Tables

Apples, Fresh	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jan 2025		Jan 2026		Jan 2027	
Argentina	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	17500	17500	17500	17500	0	17500
Area Harvested (HA)	16700	16700	16700	16700	0	16700
Bearing Trees (1000 TREES)	16500	16500	16500	16500	0	16500
Non-Bearing Trees (1000 TREES)	400	400	400	400	0	400
Total Trees (1000 TREES)	16900	16900	16900	16900	0	16900
Commercial Production (MT)	525000	525000	528000	530000	0	523000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	525000	525000	528000	530000	0	523000
Imports (MT)	2000	2000	2000	2000	0	2000
Total Supply (MT)	527000	527000	530000	532000	0	525000
Domestic Consumption (MT)	437000	437000	440000	440500	0	441000
Exports (MT)	90000	90000	90000	91500	0	84000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	527000	527000	530000	532000	0	525000
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Pears, Fresh	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jan 2025		Jan 2026		Jan 2027	
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)	17500	17500	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)	657000	657000	658000	658000	0	655000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	657000	657000	658000	658000	0	655000
Imports (MT)	500	500	500	500	0	500
Total Supply (MT)	657500	657500	658500	658500	0	655500
Domestic Consumption (MT)	307500	307500	313500	314500	0	310500
Exports (MT)	350000	350000	345000	344000	0	345000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	657500	657500	658500	658500	0	655500
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments