

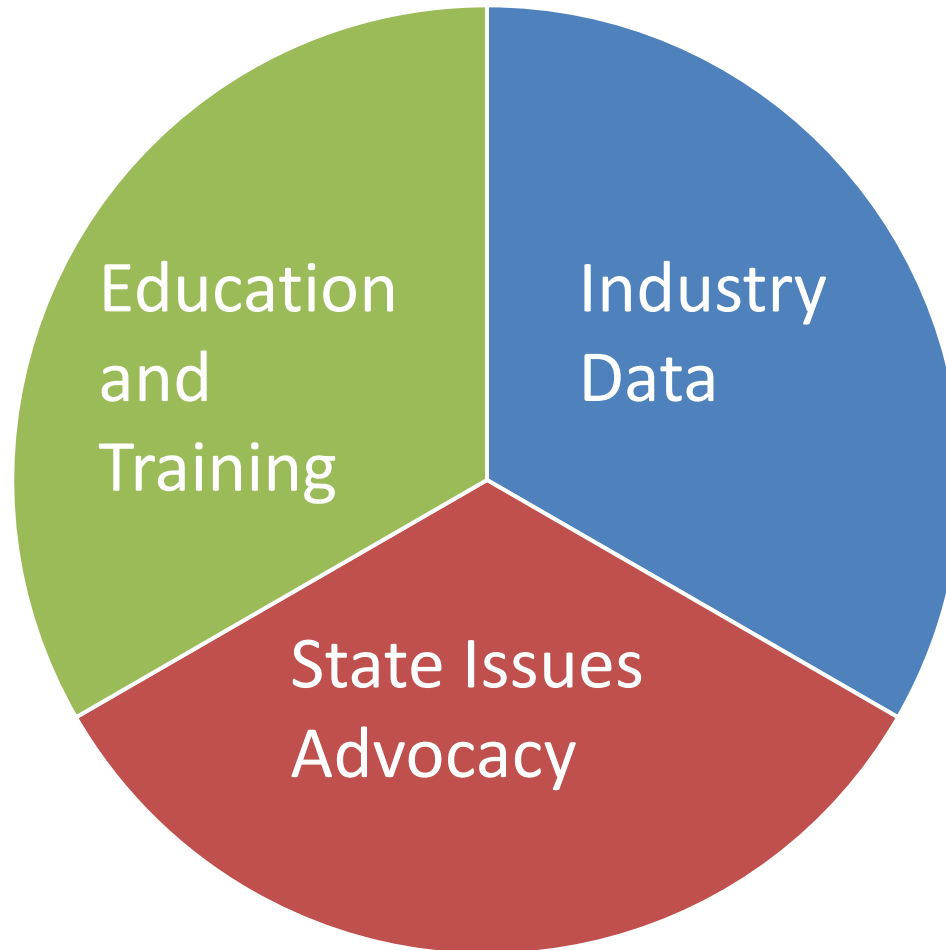


Washington State
Tree Fruit Association

Supplying Washington's Apples,
Pears, and Cherries to the World

Jon DeVaney – July 21, 2026

*Enhancing the value of all segments of
the tree fruit industry.*



Agriculture in Washington

- \$14 billion in farm gate production in 2023.
- 2023 top crops:
 1. Apples \$2 billion (14% of state's ag value)
 2. Cattle \$1.33 billion
 3. Milk \$1.31 billion
 4. Potatoes \$1.16 billion
 5. Hay \$861 million
 6. Wheat \$672 million
 7. Eggs \$405 million

Top Crops (Cont.)

- 8. Hops \$405 million
- 9. Onions \$383 million
- 10. Grapes \$309 million

Tree fruit is about 28% of WA ag value.

2022 Ag Census:

Production value increased 14%, costs 20% over five years.

This is the Place

- More than 60% of all U.S. Apples produced in Washington State, 68% of the fresh apples.
- 97% of the nation's organic apples are produced here
 - 15% of WA crop by production
 - 12% by sales
- 30% are exported - our quality is in demand.
- Even to China, which is number one at 8 times U.S. apple production.

The Big Apple

- \$5.85 billion in value after packing
- \$8.87 billion in total economic impact
- 46,385 direct jobs (orchard to packing)
 - \$1.63 billion in total annual compensation
- 22,020 indirect jobs (transportation, suppliers)
 - \$1.29 billion in total compensation
- 68,405 total Washington jobs tied to apples

(Economic Impact Study of the 2019-20 Apple Crop, Globalwise)

WA Farms with Apple Production

1910 – 27,150 farms

1920 – 35,535 farms

1935 – 44,293 farms

1954 – 10,318 farms

1964 – 6,364 farms

1987 – 5,169 farms

2007 – 3,052 farms

2012 – 2,839 farms

2022 – 2,335 farms



Apple farms
decreased by
17.76% from 2012

Policy and Economic Challenges Drive Consolidation

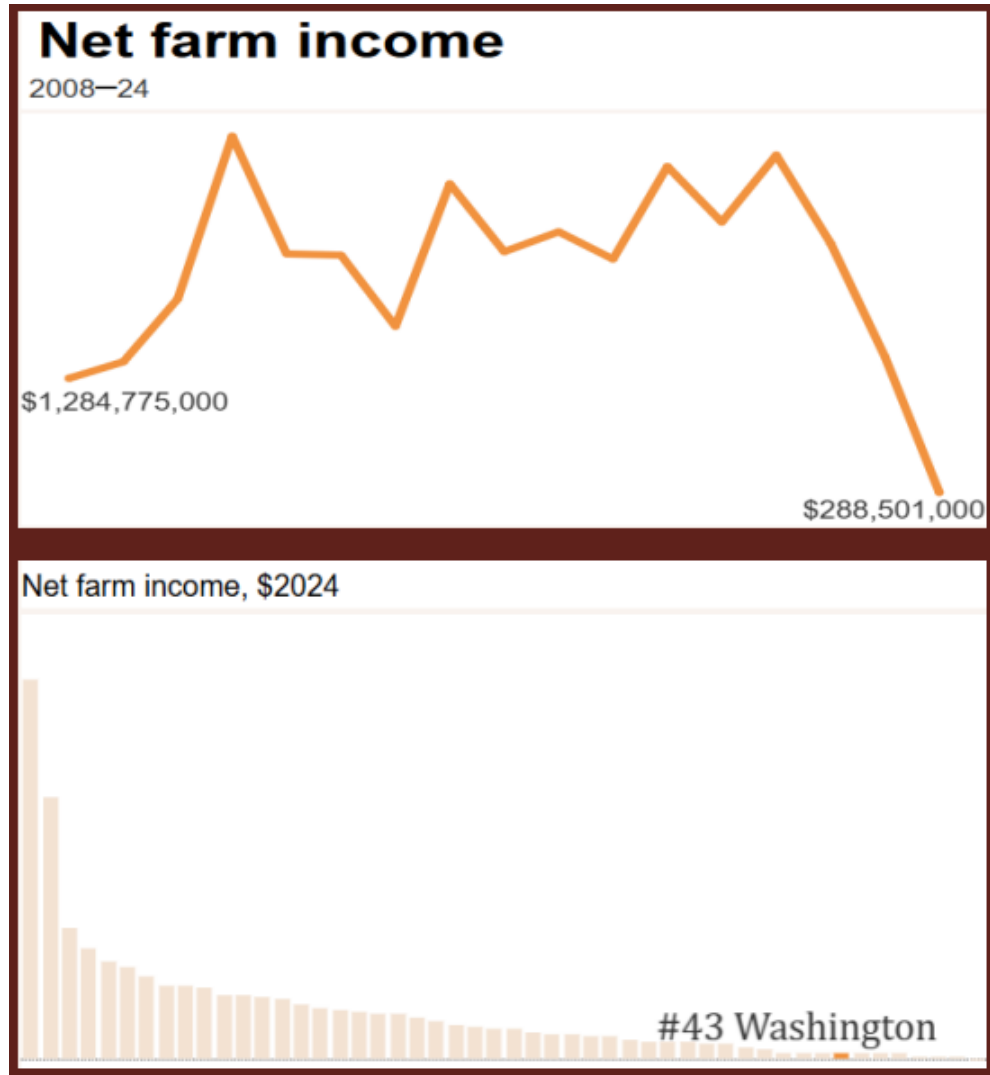
- Capital Requirements
- Calibration of Market Signals
- Competition
 - Customer consolidation.
 - Investment in new varieties.
 - Trade and access to customers.
 - Transportation costs.
- Constraints on Inputs
 - Labor supply and cost vary according to both market and political forces.
 - Water

Policy Impacts

- The connection between government actions and the orchard economy are increasingly apparent.
- This is slowly starting to affect legislative and regulatory actions.



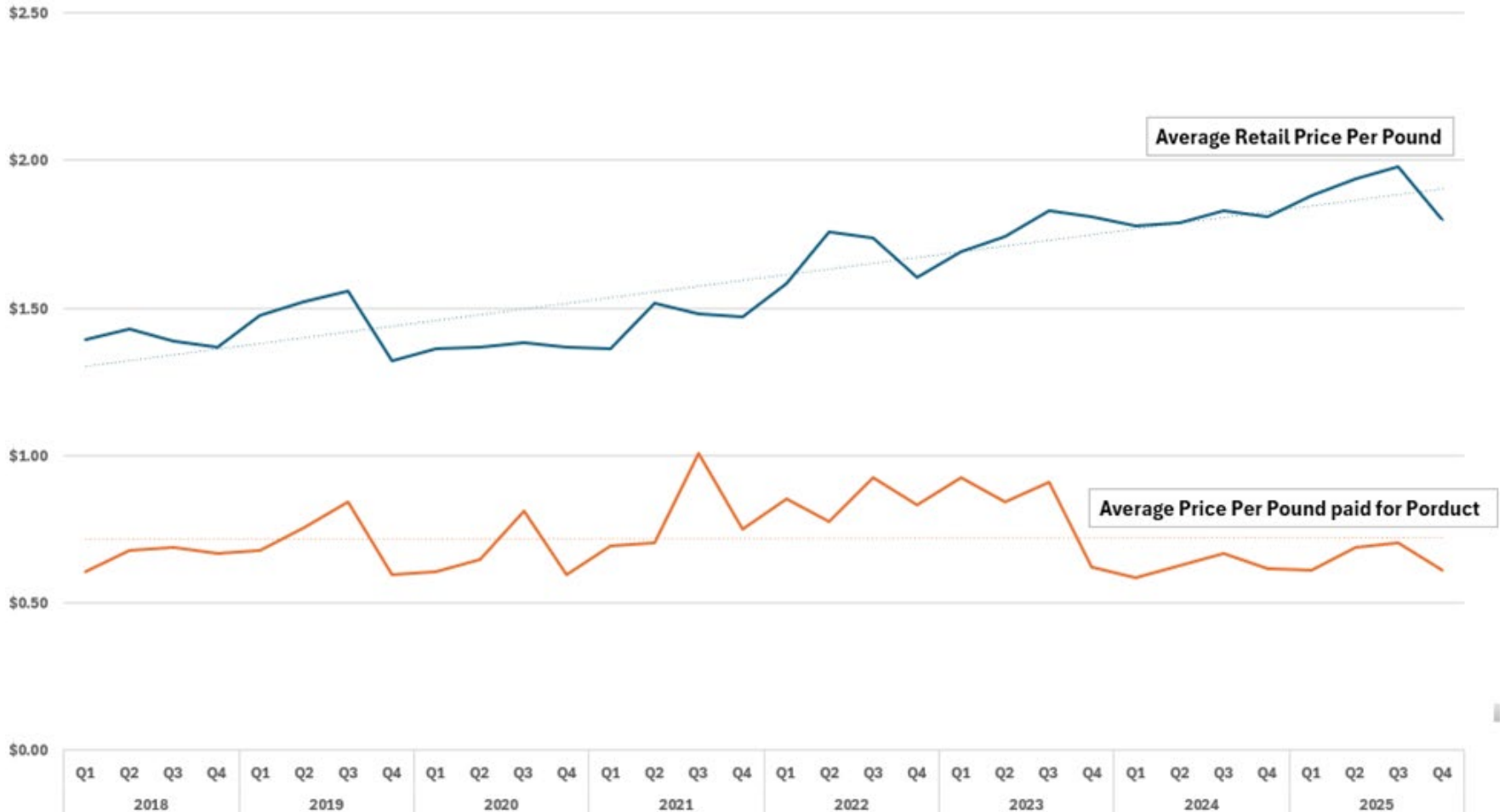
Don't Make Things Worse



WA Department
of Ag

Divergence

Price per Pound Comparison



Varietal Diversification

Apple Varieties in 1999:

51% Red Delicious
17% Golden Delicious
10% Fuji
8% Gala
8% Granny Smith
6% Other Varieties

2024 Crop:

19.7% Gala
14.7% Red Delicious
13.6% Granny Smith
10.9% Honeycrisp
9.8% Fuji
9.2% WA38/Cosmic Crisp
7.7% Cripps Pink/Pink Lady
3.4% Golden Delicious
11% Other Varieties



2024-25 Apple Export Markets

Country	2024-25		
	Shipments	% of Exports	% of Total Crop
Mexico	15,458,068	40.6%	11.9%
Canada	5,568,863	14.6%	4.3%
Taiwan	2,961,467	7.8%	2.3%
India	2,063,134	5.4%	1.6%
Vietnam	1,920,576	5.0%	1.5%
Dominican Republic	1,181,494	3.1%	0.9%
Guatemala	988,418	2.6%	0.8%
Colombia	716,082	1.9%	0.6%
Indonesia	696,657	1.8%	0.5%
Peru	687,144	1.8%	0.5%
Other Destinations	5,799,303	15.2%	4.5%
Total	38,041,206	100.0%	29.3%
Total Crop	129,742,154	-----	100.0%



Europe: 27,205 (mostly UK)

2025 Cherry Exports

Country	Boxes	% of Total Exports
Canada	2,204,119	34%
Korea	948,752	14.6%
Taiwan	917,456	14.1%
China	532,843	8.2%
Mexico	508,037	7.8%
Japan	326,304	5%
Hong Kong	209,154	3.2%
Australia	177,498	2.7%
Vietnam	170,195	2.6%
Thailand	131,724	2%

Pear Exports

Top 10 Pear Export Destination

Country	2024-25			2023-24			2022-23		
	Shipments	% of Exports	% of Total Crop	Shipments	% of Exports	% of Total Crop	Shipments	% of Exports	% of Total Crop
Mexico	1,862,927	72.11%	17.57%	2,802,931	64.39%	26.43%	3,032,817	68.63%	28.60%
Canada	577,071	22.34%	5.44%	1,052,030	24.17%	9.92%	1,099,250	24.88%	10.37%
Costa Rica	30,516	1.18%	0.29%	50,547	1.16%	0.48%	28,461	0.64%	0.27%
Israel	18,984	0.73%	0.18%	24,382	0.56%	0.23%	21,414	0.48%	0.20%
Dominican Republic	15,232	0.59%	0.14%	30,415	0.70%	0.29%	44,163	1.00%	0.42%
El Salvador	12,642	0.49%	0.12%	38,832	0.89%	0.37%	33,073	0.75%	0.31%
Taiwan	12,485	0.48%	0.12%	27,526	0.63%	0.26%	12,688	0.29%	0.12%
UAE (Dubai)	10,527	0.41%	0.10%	40,180	0.92%	0.38%	16,002	0.36%	0.15%
Guatemala	9,611	0.37%	0.09%	93,011	2.14%	0.88%	19,809	0.45%	0.19%
Panama	8,813	0.34%	0.08%	32,343	0.74%	0.30%	32,174	0.73%	0.30%
Other	24,479	0.95%	0.23%	160,770	3.69%	1.52%	79,165	1.79%	0.75%
Total	2,583,287	100.00%	24.36%	4,352,968	100.00%	29.30%	4,419,017	100.00%	31.27%
Total Crop	10,605,314	-----	100.00%	14,857,887	-----	100.00%	14,131,213	-----	100.00%

Food For Thought

Share of Americans who say select financial pressures are a major source of stress

Survey of 1,437 U.S. adults conducted July 10-14, 2025

The cost of groceries



The cost of housing



The amount of money you have saved



The amount you get paid



The cost of health care



Credit card debt



The cost of child care



Student debt



Data: [AP-NORC](#); Chart: Axios Visuals

Inflation and Value

The Washington Post
Democracy Dies in Darkness



Parenting

Parents are ‘going broke on berries’

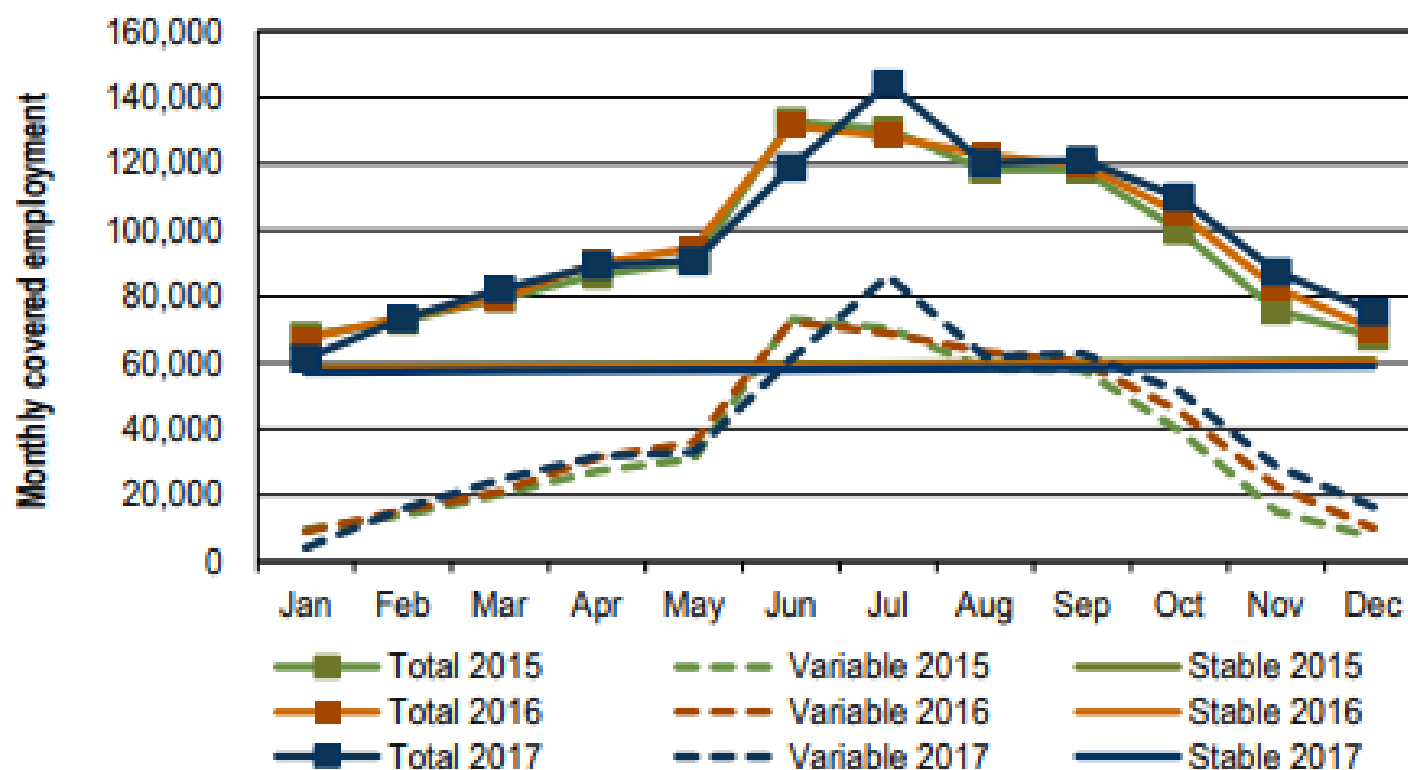
The berry habit of the tiny humans in our households is breaking the bank.

June 12, 2026

Agriculture Remains Seasonal

Figure 6. Monthly variable, stable and total covered employment in agriculture
Washington state, 2015 through 2017

Source: Employment Security Department/LMEA; U.S. Bureau of Labor Statistics, QCEW



Influenced by crop production cycles, variable employment in agriculture tended to be highest during the summer and early fall.

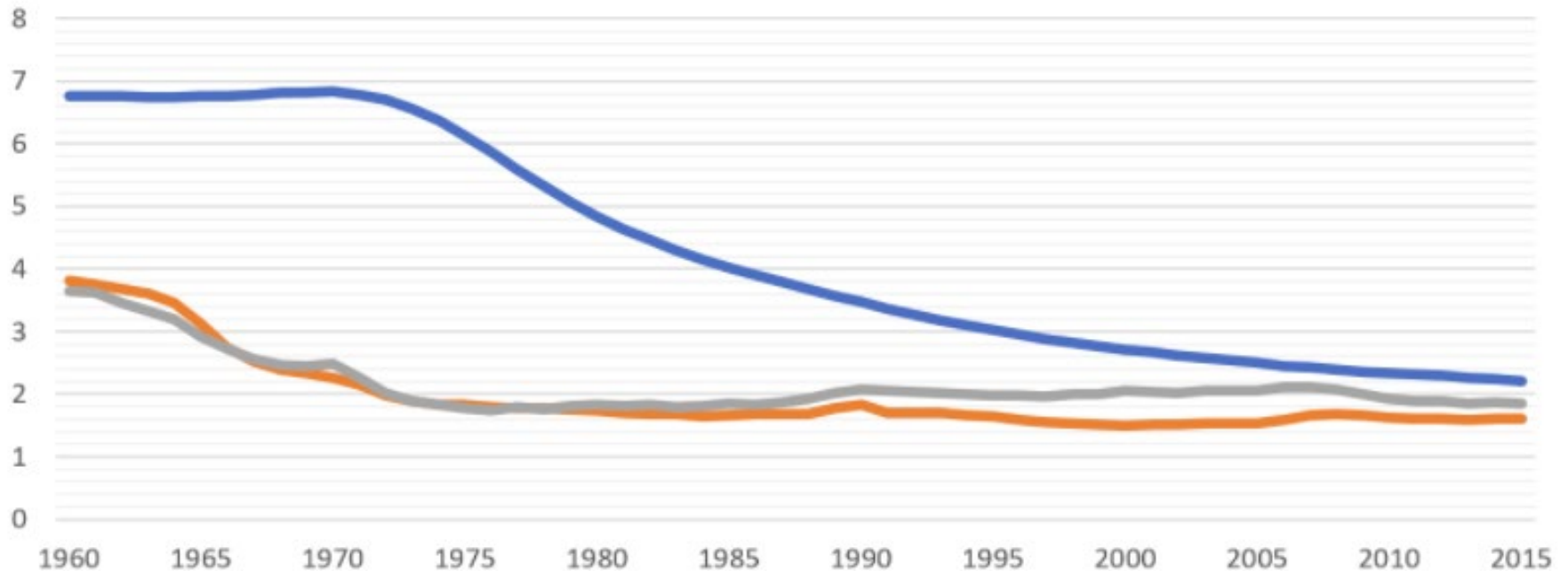
ICE Enforcement

- 42 percent of the domestic agricultural workforce is undocumented according to the National Agricultural Worker Survey.
- All of these have presented documents that appear valid in the I-9 process.
- Employers can focus on site control and preparation but can't discuss contingencies with individual workers.
- No general raids so far.

Mexico Has Changed

All in the Family
Total Fertility Rates (births per woman)
1960–2015

MEX CAN USA

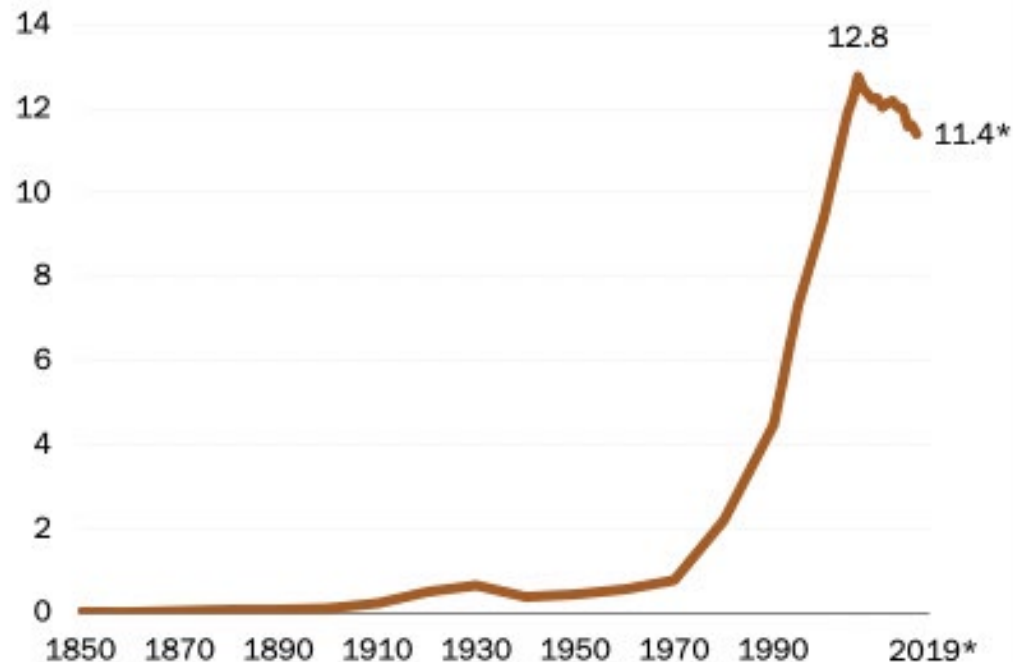


As Has Migration

- Net migration from Mexico to the US turned negative around 2007.

After peaking in 2007, the number of Mexican immigrants living in the U.S. has decreased

In millions



Labor Assistance

- Harvest equipment such as platforms, conveyors.
- Increases worker productivity, less physically demanding.

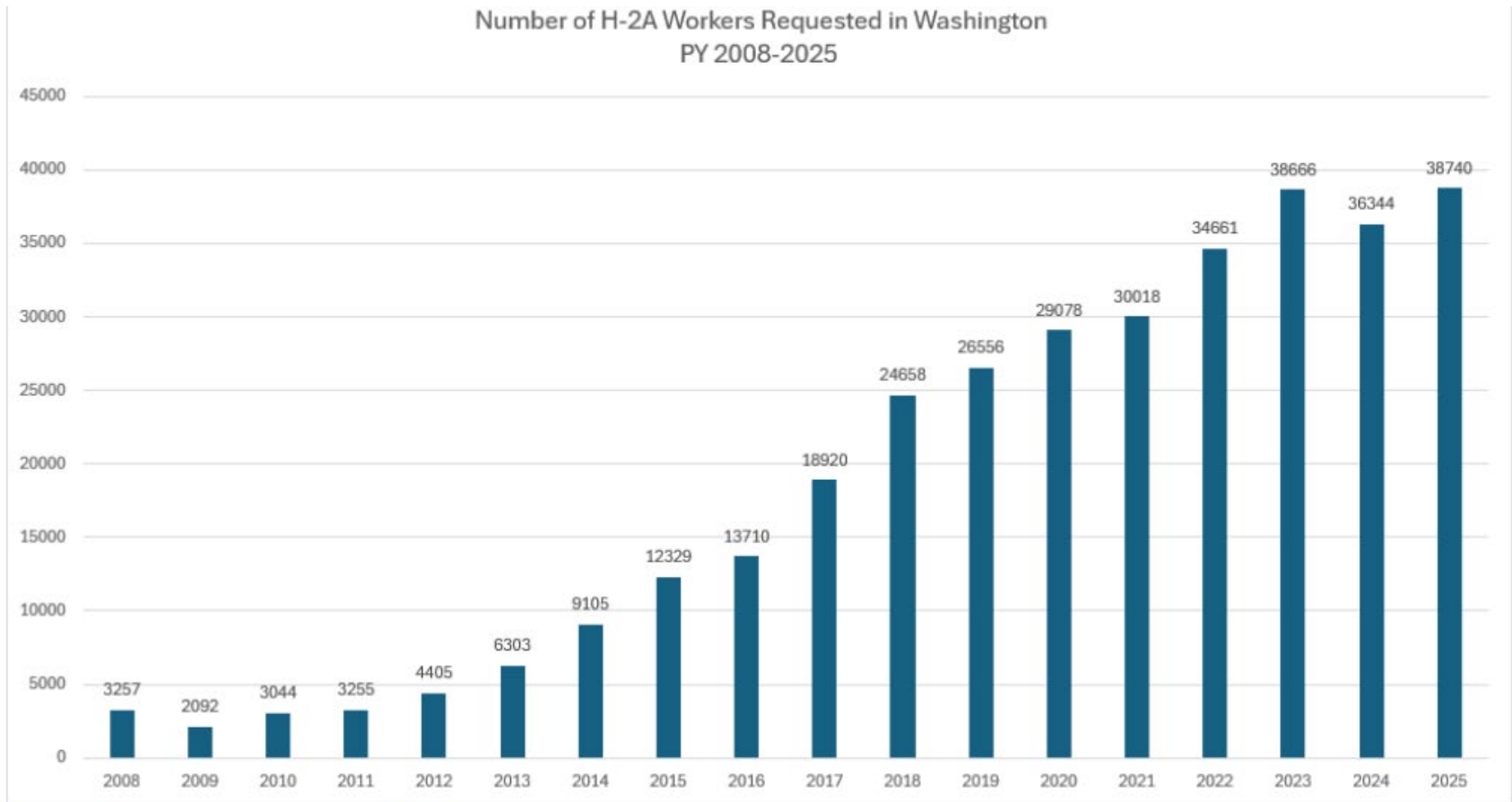


Photo: First Fruits Farms

Last Resort

- The H-2A program is designed to ensure that domestic workers are not disadvantaged.
- Employer must provide:
 - Licensed housing at no charge
 - In and out-bound transport at no charge
 - In-country transportation at no charge
 - Wages above the prevailing rate for same work
 - State Minimum Wage OR AEWR OR State/Local prevailing wage rates OR collective bargaining rate – whichever is highest

H-2A Growth Flattens



Reporting Period: Program Years 2008-2025
Definitions: This report shows the number of workers requested by employers.
Citation Source & Date: ESD/ASWS May 2026

Water

- Drought in WA for the fourth year in a row.
- Depending on seniority of water rights, could constrain access.
 - Last year even the most senior districts in the Yakima Basin were curtailed.
 - Systems shut down for a couple of weeks, and/or earlier than usual.
- Drought follows flooding in December.
- Storage and management issue, exploring statewide solutions.

Ag Labor Relations

- NLRA exempts agriculture due to concerns about strikes during harvest. No mandatory bargaining.
- SB 6045/HB 2409 would put union organizing in ag under Public Employment Relations Commission.
 - Would allow card-check
 - No oversight and jurisdiction in other states
 - De-certification process unclear
 - Allows strikes when a contract is being negotiated or lapses.

Environmental Crimes

- SB 5360 passed the Senate in 2025 and 2026.
- It would make *any* violation of several state environmental statutes (Clean Air Act, Water Pollution Control Act, Hazardous Waste Management Act) a felony subject to substantial fines and incarceration.
- Even paperwork errors and mishandling of “hazardous” cleaning products on the hazardous substances list would be felony violations.

State Farm Bill (HB 2616)

- Climate cap exemption for ag special fuels, lubricants.
- Harvest assistance for donation
- Acreage removal assistance
- Study of tax incentives to benefit agriculture
- Refrigeration HFC transition
- Trade infrastructure and competitiveness
- ALP and workforce development
- Mini Warn Act exemption
- LNI study of Ag overtime impact and seasonal options

Conclusions

- Washington agriculture has the potential for continued growth and global competitiveness.
- Policy decisions and market forces will continue to force growers to replace existing inputs with new capital investments.
- These policy-driven added costs adversely impact the competitiveness of WA agriculture.
- Policy makers are starting to recognize this and to prioritize economic viability as a factor in balance of trade.



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Tree Fruit Association

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