

Eastern New York Commercial Tree Fruit School

Apple Varieties and the Competition for Shelf Space

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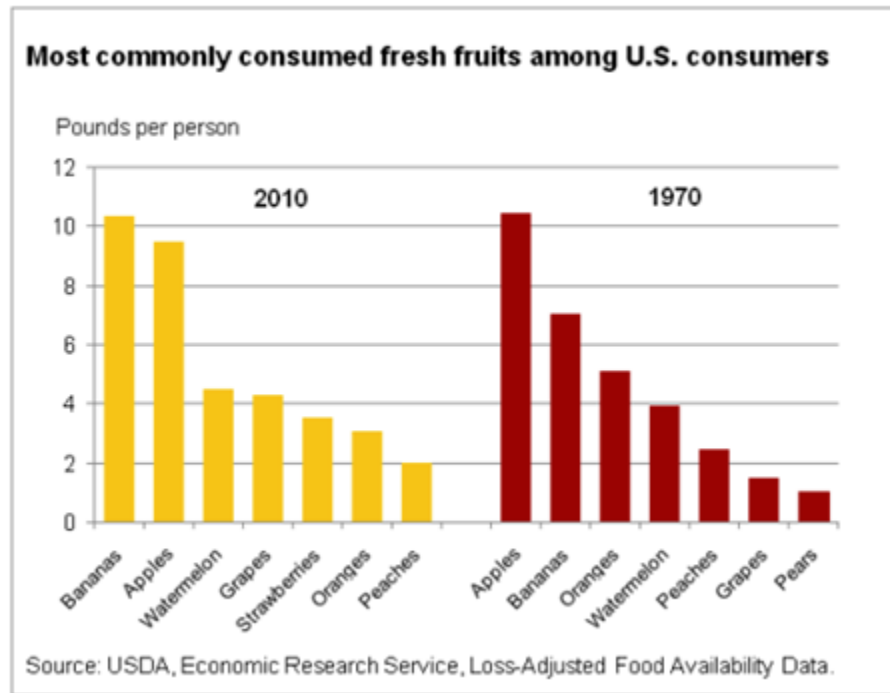
Eastern New York Commercial Horticulture Team

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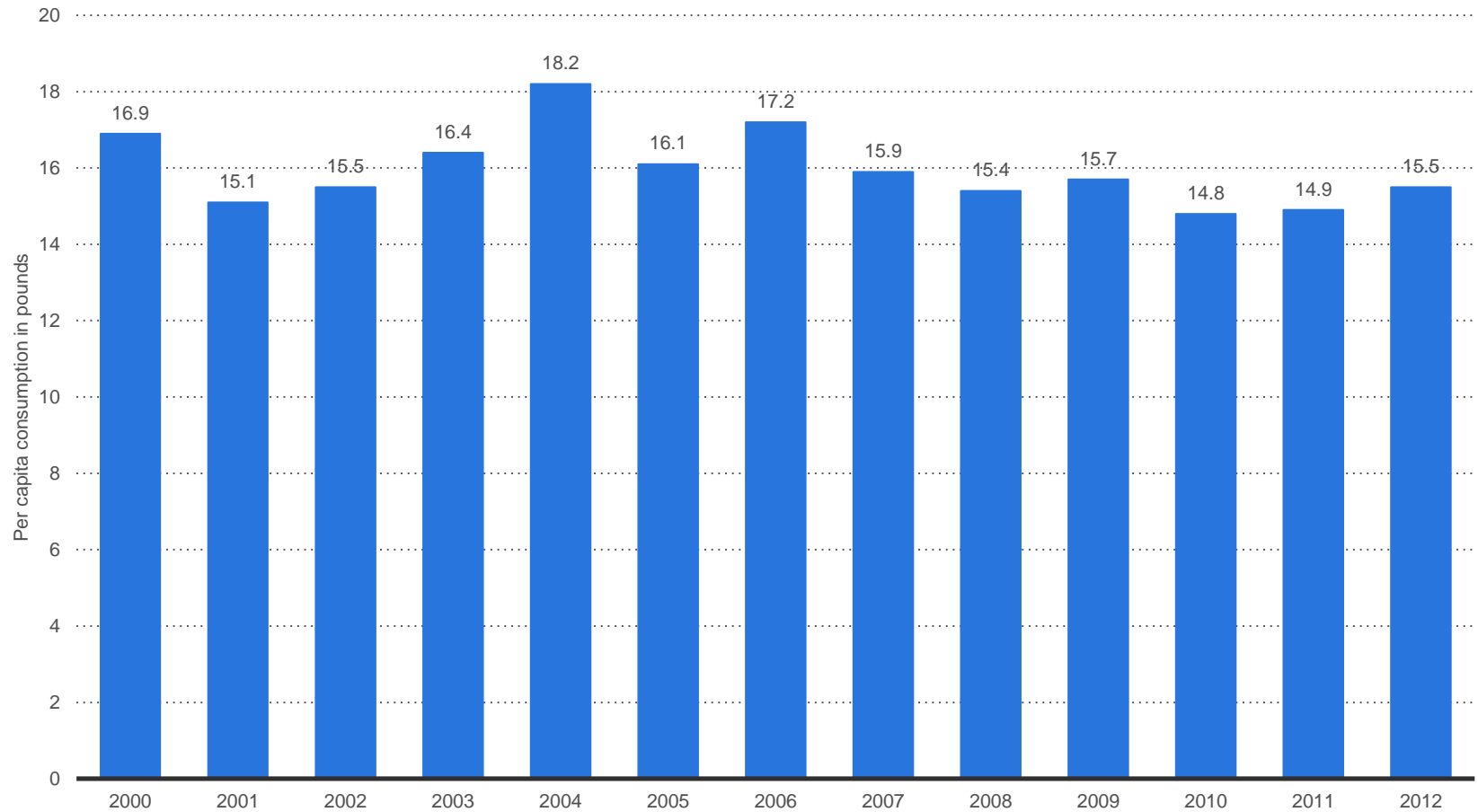
Apples are not going away soon

Apples are tried and true – familiar



U.S. per capita consumption of fresh apples 2000-2012

Per capita consumption of fresh apples in the United States from 2000 to 2012 (in pounds)*



Note: United States

Further information regarding this statistic can be found on [page 8](#).

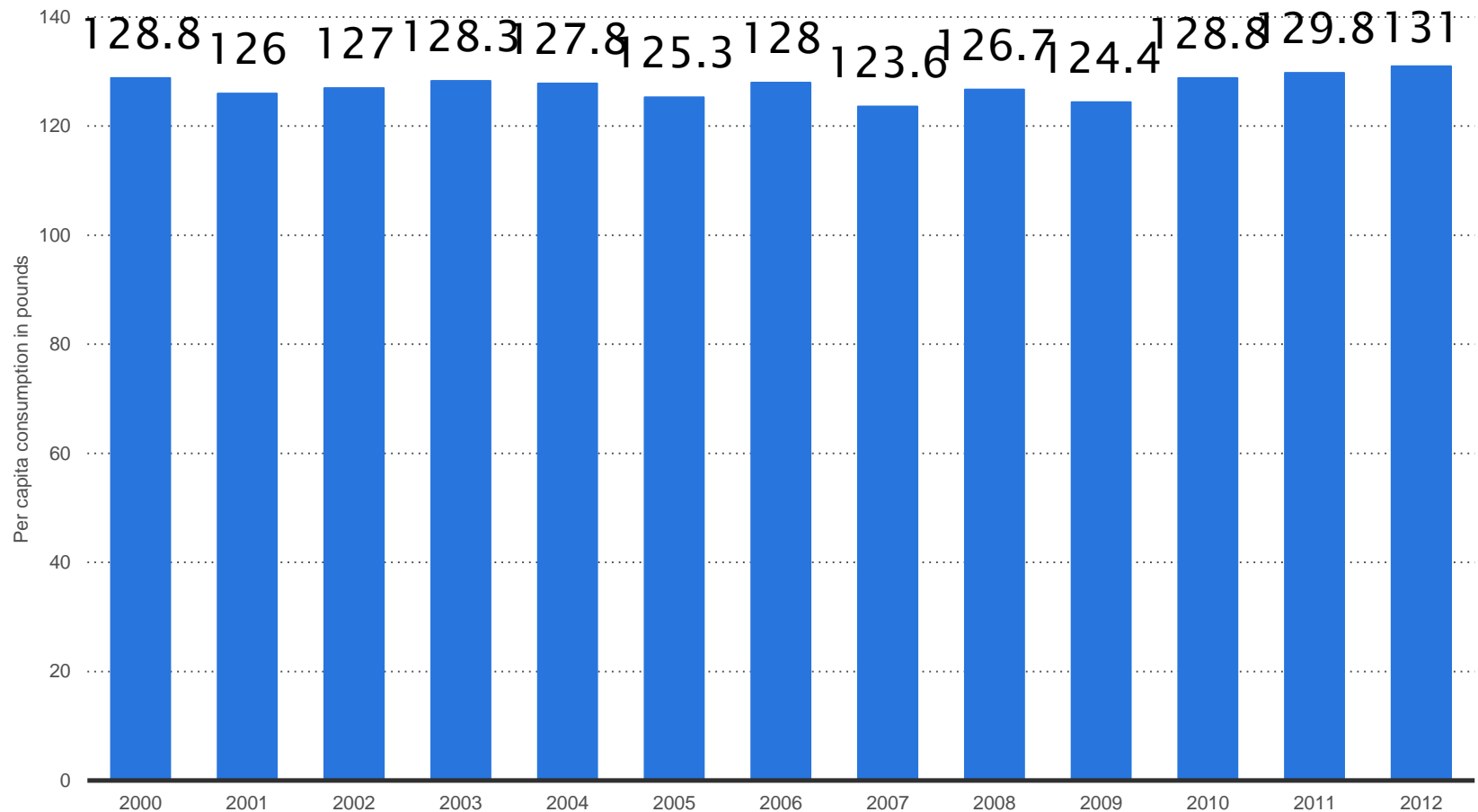
Source: US Department of Agriculture, Economic Research Service; [ID 257167](#)

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This approximates the fresh fruit trend

Per capita consumption of fresh fruit in the U.S. 2000-2012

Per capita consumption of fresh fruit in the United States from 2000 to 2012 (in pounds)*



Note: United States

Further information regarding this statistic can be found on [page 8](#).

Source: US Department of Agriculture, Economic Research Service; [ID 257127](#)

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There is opportunity!!!

Some Statistics

- ▶ Americans eat about 65 apples a year
- ▶ Fresh apple consumption was 16 lbs. in 2012
 - Slightly up from 2011
 - Approximately 51 per person
- ▶ Apple consumption has been on a long down trend for 30 years, but recently showing some stability and even potential slight increases. Dan Wheat; Capital Press

The apple consumer appears to be changing

- ▶ More affluent people are buying the more expensive varieties....
- ▶ The more affluent are buying more apples while the lower income consumers are buying fewer.

Dan Wheat: Capital Press, October 2014

What we are sending to the Consumer



Asian Pears
Crisp, juicy, and slightly
sweet. (aka. Edo Pear)
California, USA \$3.99/lb

CERTIFIED ORGANIC
Bibb's Green Romaine
Lettuce
Colorado, USA \$6.99/ea

CERTIFIED ORGANIC
Apple Cider
Colorado, USA \$6.99/ea

Valencia Oranges
California, USA \$1.99/lb

owner deals
Organic Gala Apples
\$1.99

Red Grapfruit
California, USA \$1.99/lb

Pomegranate
California, USA \$3.99/ea

Thompson Grapes
California, USA \$3.99/ea

CERTIFIED ORGANIC
Concord Grapes
California, USA \$3.99/lb

Golden Delicious Apples
New Zealand \$1.99/lb

Fuji Apples
California, USA \$3.99/lb

Golden Gala Apples
California, USA \$2.49/lb

Strawberry
California, USA \$6.99/ea

Wakona Apples
\$3.99/lb

CERTIFIED ORGANIC
NW Greening Apple
Rock Orchard
Minnesota \$2.49/lb

Mississippi
Market
Natural Foods Co-op



What the consumer sees



What the consumer feels



Why we should be concerned:

- ▶just because we can grow a Red Delicious apple that is 100% red, as opposed to 90% red, does not necessarily mean anything to the consumer. While we are congratulating ourselves on our superior packouts, we may look up and find that our consumers are gone.

Washington State University; Successful Apple Marketing in the New Millenium

Some reasons why its confusing

- ▶ There are 17,000 varieties identified between 1623 and 2000 (Dan Bussey, The Illustrated History of Apples in North America)
- ▶ The 19th century alone found 14,000 varieties in the US (Tim Hensley, Urban Homestead, Bristol Virginia)
- ▶ There are 7500 varieties grown worldwide
- ▶ The US grows 2500 varieties
- ▶ 100 are grown commercially

Varieties accounting for 90% of sales

- 1) Braeburn
- 2) Cortland
- 3) Empire
- 4) Fuji
- 5) Gala
- 6) Ginger Gold
- 7) Golden Delicious
- 8) Granny Smith
- 9) Honeycrisp
- 10) Ida red
- 11) Jonagold
- 12) Johathan
- 13) McIntosh
- 14) Red Delicious
- 15) Rome

- 1) Cortland
- 2) Empire
- 3) Fuji
- 4) Gala
- 5) Golden Delicious
- 6) Granny Smith
- 7) Honeycrisp
- 8) Ida Red
- 9) Johathan
- 10) McIntosh
- 11) Red Delicious
- 12) Rome Beauty
- 13) Northern Spy
- 14) York
- 15) Stayman
- 16) Newton

US Apple Association

AgMRC 2006

New York Varieties

(New York Apple Association)

- 1) 20 Ounce
- 2) Acey Mac
- 3) Braeburn
- 4) Cameo
- 5) Cortland
- 6) Crispin
- 7) Empire
- 8) Fortune
- 9) Fuji
- 10) Gala
- 11) Ginger Gold
- 12) Golden Delicious
- 13) Honeycrisp
- 14) Idared
- 15) Jersey Mac
- 16) Jonagold
- 17) Macoun
- 18) McIntosh
- 19) Paula Red
- 20) Red Delicious
- 21) Rome
- 22) RubyFrost®
- 23) SnapDragon®
- 24) Zestar!®

But wait – there are more New York Varieties!!!

(New York Apple Association)

- | | |
|--------------------|---------------------------|
| 25) Baldwin | 33) Newtown Pippin |
| 26) Golden Russet | 34) Northern Spy |
| 27) Golden Supreme | 35) Pound Sweet |
| 28) Jonathan | 36) Rhode Island Greening |
| 29) Lady | 37) Spigold |
| 30) Liberty | 38) Stayman/Winesap |
| 31) Lodi | 39) Tydeman |
| 32) Monroe | 40) Yellow Transparent |




The past hasn't helped

- ▶ It has been stated that the retail environment killed the Red Delicious
 - Storing too long and still selling at retail
 - Selling too far outside its ideal season
- ▶ Pippin
 - Which one? Newton or Albemarle? Or other.....
- ▶ Empire or McIntosh

What's in the market place – Brix




- ▶ Gala – 12.2
- ▶ Ginger Gold – 12.0
- ▶ Honey Crisp – 13.3/11.1
- ▶ Jonamac – 10.4
- ▶ McIntosh – 11.4
- ▶ Sweet Tango – 13.7

Into Storage

- ▶ Gala – 11.5 
- ▶ Ginger Gold – NA
- ▶ Honey Crisp – 11.5 
- ▶ Jonamac – NA
- ▶ McIntosh – 12.8 
- ▶ Sweet Tango – NA

At retail today

What's in the market place – Average pressure

- ▶ Gala – 19.6
- ▶ Ginger Gold – 17.8
- ▶ Honey Crisp – 16.7/17.8
- ▶ Jonamac – 14.3
- ▶ McIntosh – 19.2
- ▶ Sweet Tango – 17.1
- ▶ Gala – 12.3 
- ▶ Ginger Gold – NA
- ▶ Honey Crisp – 13.4 
- ▶ Jonamac – NA
- ▶ McIntosh – 11.3 
- ▶ Sweet Tango – NA

Into Storage

At Retail Today

Our competition

	Poor	Average	Good	Excellent
Apples	6	10 11.9	14	18
Bananas	8	10	12	14
Blueberries	8	12	14	18
Cantaloupe	8	12	14	16
Cherries	6	8	14	16
Grapes	8	12	16	20
Grapefruit	6	10	14	18
Honeydew	8	10	12	14
Oranges	6	10	16	20
Peaches	6	10	14	18
Pears	6	10	12	14
Pineapple	12	14	20	22
Raspberries	6	8	12	14
Strawberries	6	8	12	14
Watermelons	8	12	14	16

Dr. Carey Reams, International Ag Labs, Inc.

Bob Weybright, ENY Commercial
Horticulture Team

The realities of the modern consumer

They fundamentally don't change

"One of the weaknesses of consumers, is an admiration for foods that are polished or have a gloss, and this nickel-plate fancy plays some queer pranks with foods."

*United States Department of Agriculture Yearbook,
George Holmes, 1904*

They are timed out

The average consumer takes 23 minutes to do her shopping from the moment she slams her car door at the supermarket to the moment she climbs back in with her purchases. In that time she buys an average of 18 items out of 30,000 to 40,000 choices. She has less time to browse - it's down 25% in 5 years. She isn't even checking prices. She wants the same product, the same price in the same row, week after week. (Procter and Gamble, 2010)

So does this really work?



They are in a state of conflict

- ▶ Choices in the produce section have doubled from 10 years ago to over 500 items according to the Produce Marketing Association





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Horticulture Team



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Complication creates indifference

Apple Varieties: The Cheat Sheet

[illegible]

* Apple variety that doesn't brown quickly when sliced; a good choice for salads.

Complication creates indifference

- ▶ Baked – 43 varieties
 - Richer baked – 19 varieties
 - Lighter baked – 24 varieties
- ▶ Eating fresh and sauce – 18 varieties
 - Tender tart – 8 varieties
 - Tender sweet – 8 varieties

Substitution creates indifference

Apple Chart & Uses

Ex=Excellent, Gd=Good, Fr=Fair, NR=Not Recommended

Variety (Availability)	Flavor /Texture	Eating	Salads	Sauce	Pies	Baking	Freezing
Cortland (Sept –Nov)	Spicy /Tender	Gd	Ex	Ex	Ex	Ex	NR
Empire (Oct –June)	SweetTart /Crisp	Ex	Ex	Gd	Gd	Gd	Sauce
Fuji (Nov –June)	Sweet /Hard	Ex	Ex	NR	Ex	Ex	Slices
Gala (Sept –June)	Sweet /Firm	Ex	Ex	NR	Ex	Ex	Slices
Ginger Gold (Aug –Sept)	Tart/Crisp	Ex	Ex	Fr	Fr	NR	NR
Granny Smith (Oct –June)	Tart /Hard	Fr	Ex	Fr	Ex	Ex	Slices
Honeycrisp (Sept –Oct)	Sweet /Crisp	Ex	Ex	Fr	Ex	NR	Slices
Ida Red (Oct –May)	Mildly Tart /Firm	Ex	Ex	Gd	Ex	Ex	Ex
Jonagold (Oct –June)	Sweet /Tangy	Ex	Ex	Gd	Ex	Ex	NR
Jonathan (Sept –June)	Tart-Spicy	Ex	Ex	Gd	Ex	Ex	Slices
McIntosh (Sept – March)	Spicy /Tender	Ex	Ex	Gd	Gd	Gd	Sauce
Melrose (Oct –April)	Mild /Crisp	Ex	Ex	Ex	Ex	Gd	Slices & Sauce
Red Delicious (Sept –June)	Sweet /Rich	Ex	Ex	NR	Fr	Gd	NR
Yellow Delicious (Sept –June)	Rich /Semi- Firm	Ex	Ex	Gd	Gd	Ex	Slices & Sauce

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Substitution creates indifference

- ▶ Looking at Eating; Salads, Sauce, Pies, Baking
- ▶ Excellent ratings – 45
- ▶ Good ratings – 14
- ▶ Fair ratings – 6
- ▶ Not recommended ratings – 5

Facts are not always “real”

The consumers perception is our reality –

with a buyer to get in the middle to muddle things up

There's hope, it's not a lost cause

Some tools to succeed

- ▶ Sell apples in more places
 - Sliced apples
 - Cored apples?
 - Ingredients in other grocery areas
 - What happened to the Apple Cart on the street
- ▶ Change the current market display
 - Group apples by use rather than variety
 - Bring pie crusts to us
- ▶ Embrace technology
 - Use scan data
 - Follow the lead of other sectors – category management

Accept, embrace, and prepare for the future

- ▶ Understand and accept that the future for apple sales and marketing will be different than in the past
- ▶ To club or not????
 - It is the wave of the future.....
 - Commodity or niche marketing
 - How many trees in planting
 - Does it solve a production problem
- ▶ Speed is king in the retail arena

How do we stay in the game?

- ▶ Know what you are growing, and will be growing
- ▶ Know what you won't be growing
- ▶ Work as an industry and function as an individual
 - Just don't lose your ability to strategize for your farm

Quality, Quality, QUALITY!!!

- ▶ Make post harvest a decision and not an accident – all the way to the customer
 - Worry about what happens after your sale
 - ▶ Provide a consistent and fantastic product
 - a great pack of fruit gets simply gets you "in the door." If you have a great pack of fruit, then you are one of the people that that retailer is willing to talk to
- (Successful Apple Marketing in the New Millennium)

Work with and for the consumer

- ▶ Talk to/with and educate the customer
 - Worry about what happens after your sale
- ▶ Think Like a consumer
- ▶ And maintain your passion for your craft!!

Thank You!!

»» Good Luck!!!!

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