



June 30, 2026

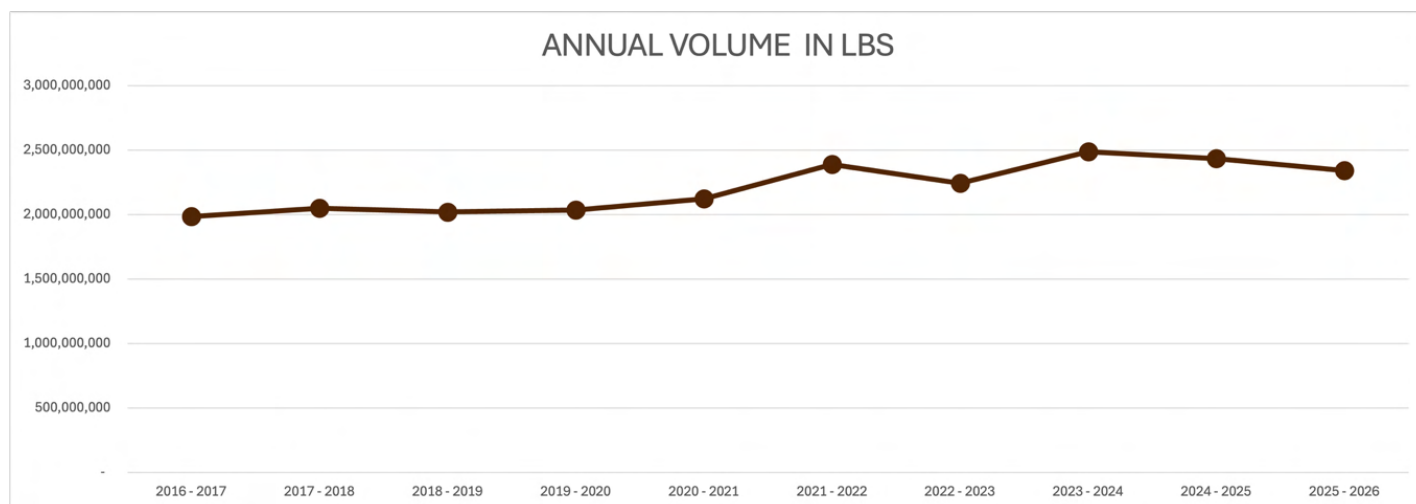
ANNUAL REPORT OF THE STRAWBERRIES MARKET IN THE UNITED STATES

The strawberries sector has experienced robust structural growth over the last decade, establishing itself as an increasingly vital category within the U.S. fresh produce market. This growth has been driven by a big jump in import volumes from Mexico, as well as a steady increase in California's production, both of which have successfully met rising consumer demand.

This document presents the evolution of the strawberries market in the last decade, as well as a more specific focus between the years 2023 to 2026, as well as a count of the main destinations to which the United States exported strawberries in 2025.

To have the most up-to-date information possible, this report covers the period from Jun 1, 2025, to May 31, 2026.

TOTAL ANNUAL VOLUME OF STRAWBERRIES BETWEEN 2016 AND 2026



Throughout the decade, the strawberry market has shown some volatility, with clear volume fluctuations from year to year. The highest market volume of the entire decade was hit during the 2023–2024 season. However, over the last two years, volumes have dropped compared to those peak years. Despite this recent slowdown, looking at the bigger picture and comparing the 2016–2017 season directly with the 2025–2026 season, overall volume growth has still reached 17.96%



ANNUAL STRAWBERRIES VOLUME BETWEEN 2016 AND 2025

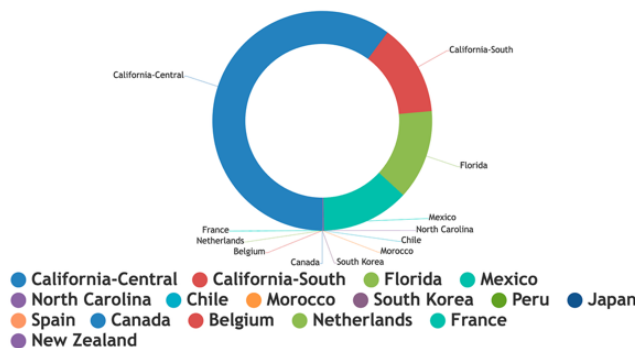
Period	Volume (Lbs.)	Growth (%)
2016 - 2017	1,983,716,688	17.40%
2017 - 2018	2,049,402,842	3.31%
2018 - 2019	2,019,753,427	-1.45%
2019 - 2020	2,034,920,354	0.75%
2020 - 2021	2,121,669,161	4.29%
2021 - 2022	2,390,006,757	12.67%
2022 - 2023	2,242,908,449	-6.14%
2023 - 2024	2,488,050,363	10.93%
2024 - 2025	2,433,484,387	-2.19%
2025 - 2026	2,340,294,042	-3.83%

When evaluating the numbers over the last decade, the sharpest volume contraction occurred during the 2022–2023 season, recording a 6.14% drop compared to the previous year and marking the lowest volume floor of the last five years. On the other hand, the market saw jumps of over 10% during the 2016–2017, 2021–2022, and 2023–2024 seasons compared to the year before. Thanks to this growth, the industry has consistently broken through the 2.2-billion-pound mark every year since the 2021–2022 season.

COMPARISON OF MARKET SHARES BY PRODUCING REGION

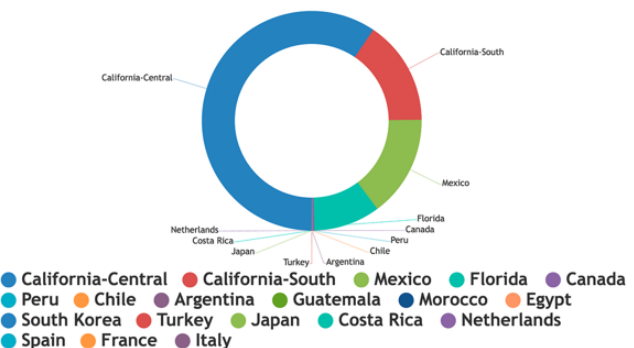
2016 - 2017

agtools
EUA - Informe de Volumen
Strawberries, Custom Conventional
6/1/2016 al 5/31/2017



2025 - 2026

agtools
EUA - Informe de Volumen
Strawberries, Custom Conventional
6/1/2025 al 5/31/2026



When analyzing the supplying regions for raspberries in the United States, the market expanded from 16 supplying regions in the 2016-2017 season to 19 regions in 2025-2026. Furthermore, despite this broader diversification of supplying regions, the core leadership structure remains highly concentrated. California Central and California South continue to stand out as two of the main supplying regions in the market. In fact, the most notable change in the top five was North Carolina dropping out and Canada moving in, which is impressive since Canada wasn't even in the top ten a decade ago.

GROWTH COMPARATIVE OF TOP 5 REGIONS OF STRAWBERRIES IN 10 YEARS

Region	2016-2017	% Share	2025-2026	% Share	Growth (Lbs)	Growth (%)
California Central	1,192,429,824	60.11%	1,391,452,136	59.46%	199,022,312	16.69%
California South	267,356,112	13.48%	360,377,728	15.40%	93,021,616	34.79%
Mexico	256,729,659	12.94%	350,140,299	14.96%	93,410,640	36.38%
Florida	262,516,504	13.23%	229,418,912	9.80%	(33,097,592)	-12.61%
Canada	3,187	0.0001%	6,410,425	0.27%	6,407,238	201042.92%
Rest of the Regions	4,681,402	0.24%	2,494,542	0.11%	(2,186,860)	-46.71%
Total	1,983,716,688	100%	2,340,294,042	100%	356,577,354	17.98%

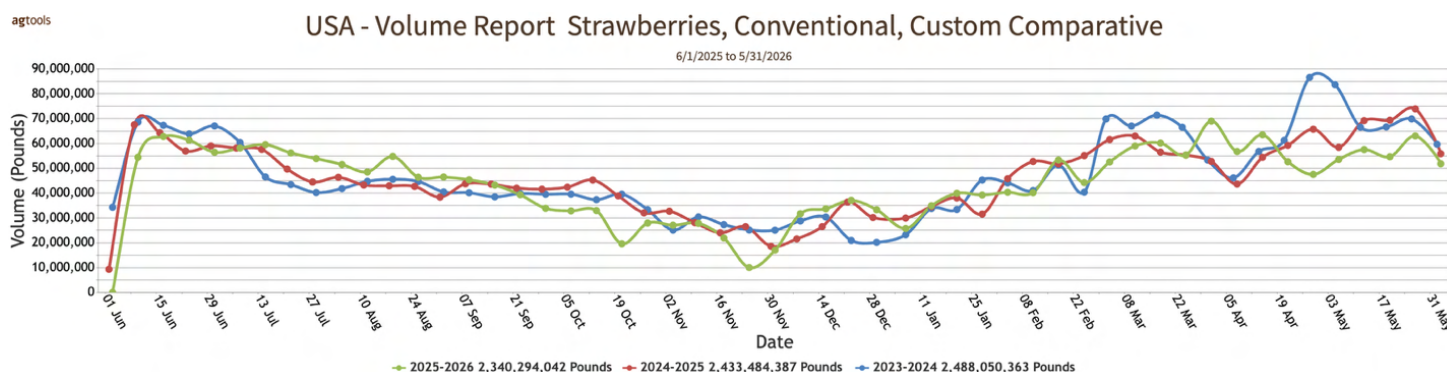
In terms of market share over the last decade, Central California is the only region in the top three that saw a decrease in its market participation, though this drop was under 1%. On the other hand, both California South and Mexico successfully increased their shares. As for Florida and Canada, which round out the top five, their paths were very different. Florida's market share dropped by more than 3%, while Canada saw massive growth, jumping from less than 4,000 pounds to over 6.4 million pounds in just a decade.

GROWTH OF THE MAIN REGIONS IN 2025-2026

Location	Volume (Lb)	Difference (Lb)	Variance	Var%
California-Central	1,391,452,136	31,031,616	more than same period 2024 - 2025	2.28
California-South	360,377,728	16,623,424	less than same period 2024 - 2025	-4.41
Mexico	350,140,299	66,820,457	less than same period 2024 - 2025	-16.03
Florida	229,418,912	42,535,712	less than same period 2024 - 2025	-15.64
Canada	6,410,425	469,109	less than same period 2024 - 2025	-6.82
Peru	673,215	673,211	more than same period 2024 - 2025	16,830,275.00
Chile	493,348	493,348	more than same period 2024 - 2025	100.00
Argentina	365,341	365,341	more than same period 2024 - 2025	100.00
Guatemala	323,004	323,004	more than same period 2024 - 2025	100.00
Morocco	261,070	261,070	more than same period 2024 - 2025	100.00
TOTAL VOLUME	2,340,294,042	93,158,513	less than same period 2024-2025	-3.83%

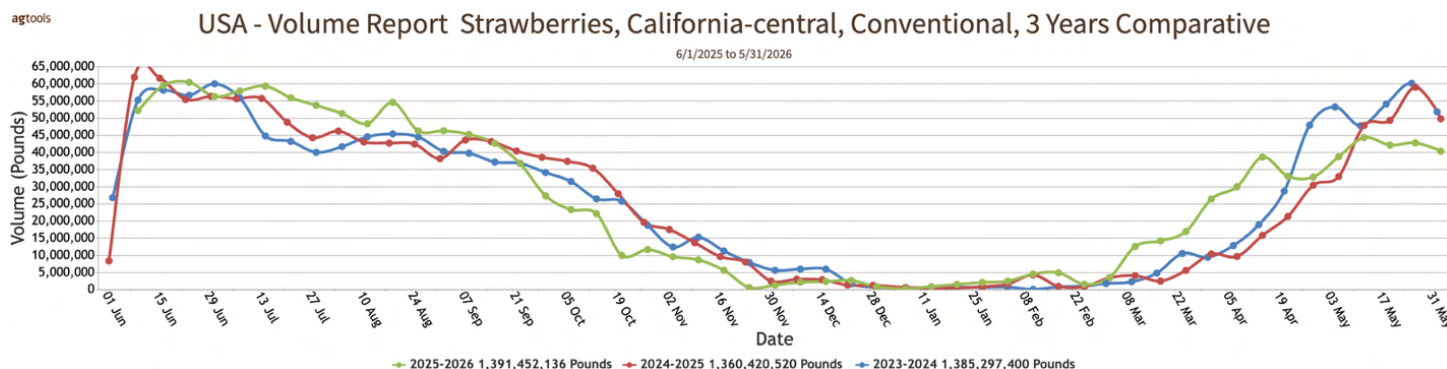
Analyzing the last 12 months, California Central — the top producing region — was the only one in the top five that saw a volume increase, growing by 2.28% compared to the previous year. The rest of the top five regions all posted lower volumes than the year before. The most dramatic drops came from Mexico and Florida, which fell by 16.03% and 15.64%, respectively. This volume slowdown across the most important regions dragged the total market volume down, leaving it 3.83% lower than the 2024–2025 season.

3-YEAR COMPARISON OF WEEKLY VOLUME OF THE TOTAL STRAWBERRIES MARKET



Analyzing the market over the last three years, we can see that the 2025–2026 season hit the lowest volume in this period. This marks a downward trend, as volumes have dropped year after year since the 2023–2024 peak. A week-by-week analysis shows short moments where volumes dipped for just a week or two, but there were only two windows where the drop lasted for several consecutive weeks. The most noticeable slowdowns happened between mid-September and early November 2025, and then again after mid-April 2026, where the volume drop was much more pronounced.

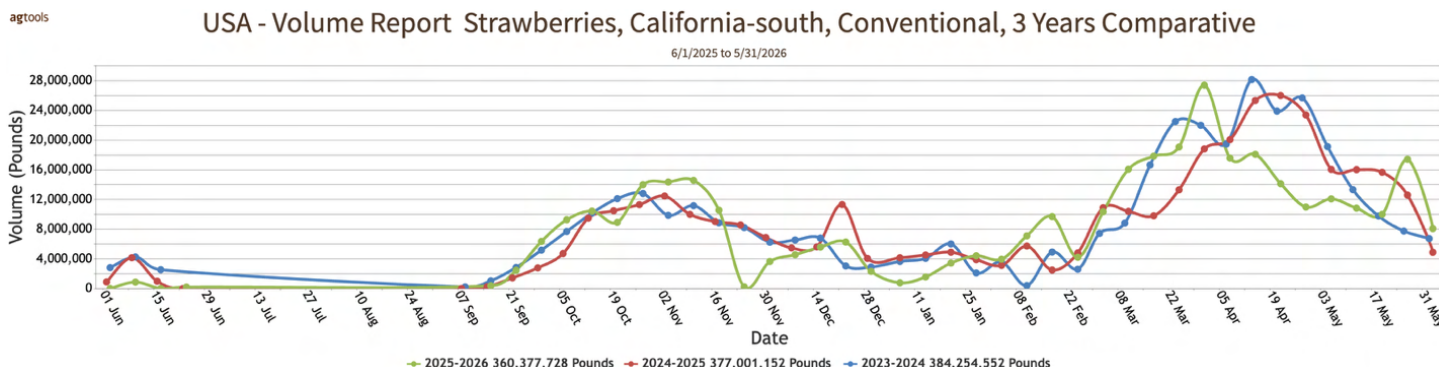
3-YEAR COMPARISON OF CALIFORNIA CENTRAL STRAWBERRIES WEEKLY VOLUME IN THE U.S. MARKET



Looking closely at California Central — the only region that grew over the last year, as mentioned before — we can see that its volume broke past 1.39 billion pounds. This sets a record for the region over the last decade. This growth mostly happened during two specific timeframes: from July to early September 2025, and from March to mid-April 2026.

During the rest of the year, California Central maintained a steady pace that matched its typical historical numbers. This consistent baseline, combined with those two big peaks, was exactly what allowed the region to secure its record-breaking annual total.

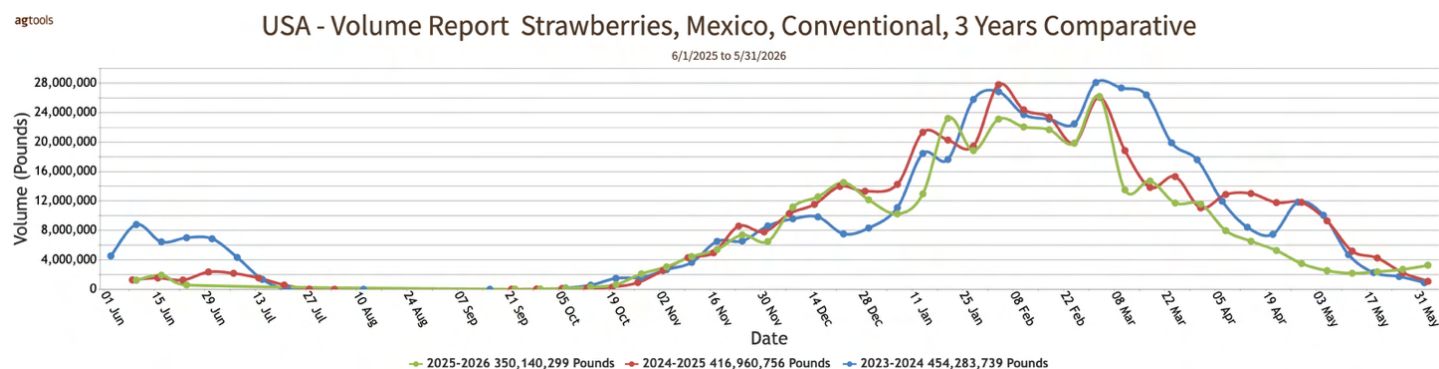
3-YEAR COMPARISON OF CALIFORNIA SOUTH STRAWBERRIES WEEKLY VOLUME IN THE U.S. MARKET



California South, on the other hand, saw a 4.41% drop compared to the previous year, hitting its lowest volume in the last three years. In fact, the region has been losing over 5 million pounds year-over-year during this three-year period. This recent downturn was mostly driven by a sharp volume drop that lasted from early April to mid-May 2026.

This continuous drag throughout the season ultimately prevented Southern California from recovering its baseline from previous years.

3-YEAR COMPARISON OF MEXICO STRAWBERRIES WEEKLY VOLUME IN THE U.S. MARKET



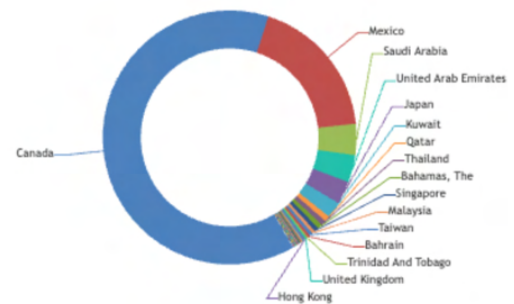
Mexico, which rounds out the top three, had a tough 2025–2026 season with dramatically lower volumes. It saw a 16.03% drop—the sharpest decline among all supplying regions. This also marks its lowest volume in the last six years, making it the only time since the 2019–2020 season (which was heavily impacted by COVID-19) that Mexico failed to clear the 400-million-pound mark. This downward trend has been highly visible, especially since early March 2026, when volumes first started to take a dramatic dive.

MAJOR INTERNATIONAL DESTINATIONS FOR U.S. STRAWBERRIES SHIPMENTS (2025)

Country	Total Volume Price (USD)	Total Volume (Lb)
Canada	\$349,918,064.00	200,616,542.07
Mexico	\$101,402,843.00	76,238,693.95
Saudi Arabia	\$21,981,837.00	6,598,156.49
United Arab Emirates	\$19,196,987.00	5,464,693.01
Japan	\$16,237,840.00	4,568,307.74
Kuwait	\$11,338,044.00	4,213,945.94
Thailand	\$3,656,619.00	1,595,838.44
Singapore	\$3,088,475.00	1,376,575.75
Bahamas, The	\$3,340,002.00	1,182,765.40
Qatar	\$3,948,974.00	1,172,752.02

Strawberries, United States, Custom

1/1/2025 to 12/31/2025



When analyzing the top ten destinations for U.S. strawberry exports in 2025, Canada stands out as the absolute leader, accounting for 63.27% of total exports with a volume exceeding 200 million pounds. Mexico and Saudi Arabia complement the top three, recording 76.23 million and 6.59 million pounds exported to these destinations, respectively. Meanwhile, the United Arab Emirates and Japan round out the top five, demonstrating that outside of its North American neighbors, the Middle Eastern and Asian markets position themselves as robust and critical hubs for U.S. strawberry distribution.

In conclusion, the strawberry market has shown solid long-term growth over the last decade, expanding by 17.96% despite facing some recent supply chain volatility. While the industry hit its highest volume during the 2023–2024 peak, the last two seasons have seen a moderate slowdown, mostly dragged down by dramatic volume dives in key supplying regions like Mexico and Florida. In contrast, Central California set a historic record by breaking past 1.39 billion pounds, proving to be a resilient anchor for the domestic market.