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Fruit and Tree Nuts Outlook: March 2026

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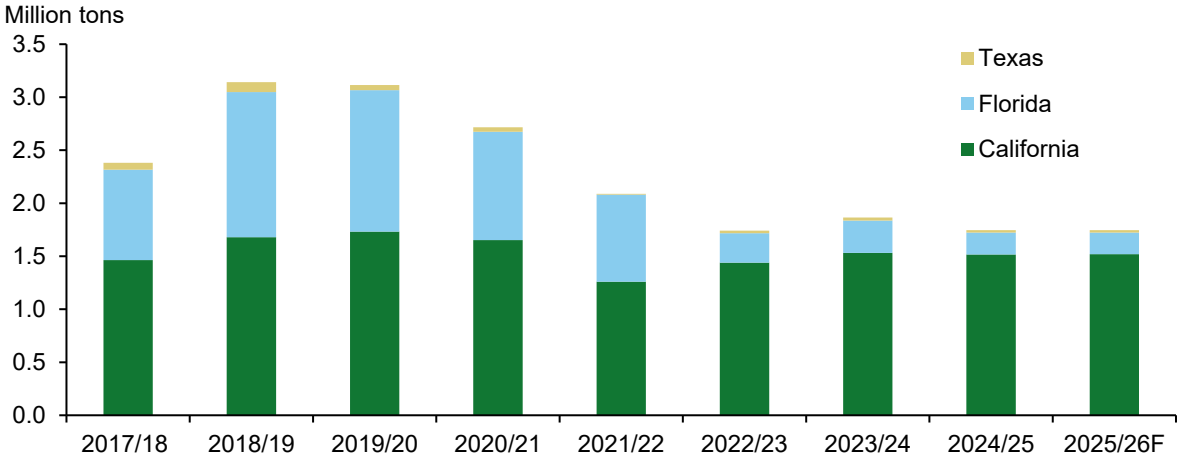
In this report:

U.S. Citrus Season

The USDA, National Agricultural Statistics Service (NASS) forecast for 2025/26 U.S. early, midseason, and Navel orange production is 1.746 million tons (released on January 12, 2026), unchanged from last season. USDA, NASS groups oranges into two primary categories: 1) early, midseason, and Navel, and 2) Valencia. The early/midseason and Navel category includes varieties that are typically harvested between October and March, while Valencia harvest is later (March–July). In the previous 3 marketing years, about 70 percent of U.S. orange production was in the early/midseason and Navel category. California produces more than 80 percent of oranges in this category, mostly for the fresh market. Florida is the second-largest producer of early/midseason and Navel oranges, with most output used for processing. USDA, NASS will release updated production forecasts for early/midseason and Navel oranges and Valencia oranges in the April 2026 *Crop Production* report.

Early, midseason, and Navel orange production forecast unchanged from last season



F = Forecast.
Note: Utilized production in ton equivalent for early, midseason, and Navel oranges. Excludes Valencia orange production.
Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, *Crop Production* (released on January 12, 2026).

Weather Outlook

Winter Freezes and West Coast Water

Weather events and water availability in 2026 will continue to frame the outlook for fruit and tree nut production in the United States. Three States account for about 90 percent of U.S. annual fruits and nuts cash receipts (2023–24 average); California (75 percent), Washington (10 percent), and Florida (3 percent). In 2026, the USDA, Economic Research Service forecast for U.S. fruits and nuts cash receipts for all States is $33.4 billion, representing 6 percent of the total U.S. farm sector cash receipts forecast.

Florida freeze events: This winter, specialty crop producers experienced two severe freeze events in northern and central Florida: Winter storms Ezra (December 30, 2025–January 1, 2026) and Gianna (January 26–February 4, 2026). Freezing temperatures and prolonged cold resulted in crop losses and plant stress for many specialty crops. The last time Florida experienced a freeze of similar magnitude was during 2010.

A February 2026 report from the Florida Department of Agriculture and Consumer Services (FDACS) indicated widespread crop losses for this season's blueberry crop in Florida. Prolonged cold temperatures overlapped with early-season blueberry flowering and early fruit-set. Florida strawberries and Valencia oranges were also negatively impacted by the freeze. However, Florida watermelon growers largely avoided damage from Winter storms Ezra and Gianna because most of the crop had not been planted yet.

California's snowpack was well below average in late-March: While major water reservoir levels are above average this spring, adequate snowpack is critical for managing about 30 percent of California's annual water needs. Snowpack accumulates in the Sierra Nevada during the winter and early spring, with volumes usually peaking around April 1. As of March 23, 2026, the California Department of Water Resources reported that Statewide snowpack was 29 percent of normal.

Two major suppliers of agricultural irrigation water in California are the Central Valley Project (CVP) and the State Water Project (SWP). The U.S. Department of the Interior, Bureau of Reclamation owns and operates the CVP, one of the world's largest water supply projects. About 75 percent of CVP water is used to irrigate agricultural land in California. On March 24, 2026, Reclamation announced an increase from its initial water supply allocation for irrigation contractors serving the Central Valley (South-of-Delta) from 15 percent to 20 percent of their contract total. This year's allocation is lower than the water supply allocation in the previous 2

water years (50 and 55 percent, respectively), but higher than the zero percent allocation for South-of-Delta agricultural contractors during drought conditions in 2021 and 2022.

The SWP is operated by the California Department of Water Resources. About 34 percent of SWP's average water allocation was for agricultural use in the last two decades—with the remaining amount used for residential, municipal, or industrial use. On January 29, 2026, the Department of Water Resources allocated 30 percent of requested SWP water supplies. In the 2024 and 2025 water years (October–September), the California Department of Water Resources' final allocations were announced at the end of April at 40 and 50 percent, respectively. The year-over-year reduction in water allocations by CVP and SWP in early spring 2026 are based on lower-than-average snowpack and other current hydrological conditions in California.

Washington State's drought declaration persists: In June 2025, the Washington Department of Ecology declared a drought emergency across most of Central and North Central Washington due to low snowpack, and this declaration remained in effect as of mid-March 2026. The 2026 water year in Washington (October 2025–September 2026) started wetter and warmer than average. Precipitation in December 2025 led to increased soil moisture conditions and above average water supplies in the Yakima Basin reservoirs. However, Statewide snowpack in February 2026 was the third lowest on record (52 percent of normal), after 2005 and 2015.

The Bureau of Reclamation manages the water in the five Yakima Project storage reservoirs (along with the basin's unregulated inflows) to fulfill water rights, water contracts, and instream flow obligations. When water supplies are limited, senior water rights holders receive their allocated entitlements before junior water rights holders. Water shortages in the basin are shared equally among junior water right holders, which represent more than half of the water rights in the basin. On March 5, 2026, Reclamation's total water supply forecast for the Yakima basin during the April–September 2026 period is 100 percent for senior water rights holder entitlements and 44 percent for junior water rights holder entitlements. Reclamation updates its water allocation forecast monthly as conditions in the basin change.

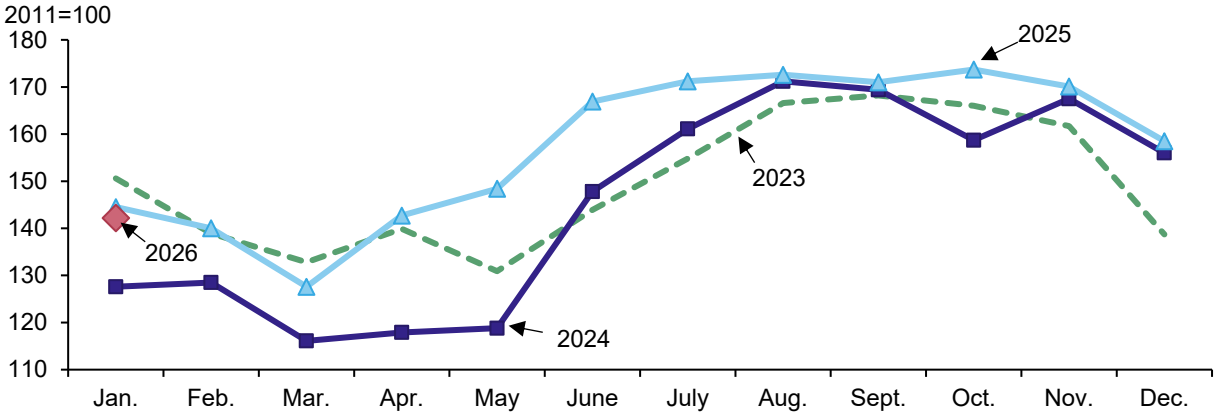
Price Outlook

Fruit and Tree Nut Grower Prices Are Lower in Early 2026

In January 2026, the USDA, NASS index of prices received by growers for fruit and tree nuts was 142 (2011=100), about 2 percent lower than January 2025 but 11 percent higher than January 2024 (figure 1). Grower prices for apples, pears, and lemons were lower in early 2026 than in early 2025. The Fruit and Tree Nuts Prices Received Index tends to increase in the late spring and early summer (June through August). This trend partially stems from seasonal production of fruit and tree nuts.

Figure 1

Index of prices received by growers for fruit and tree nuts



Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, *Agricultural Prices.*

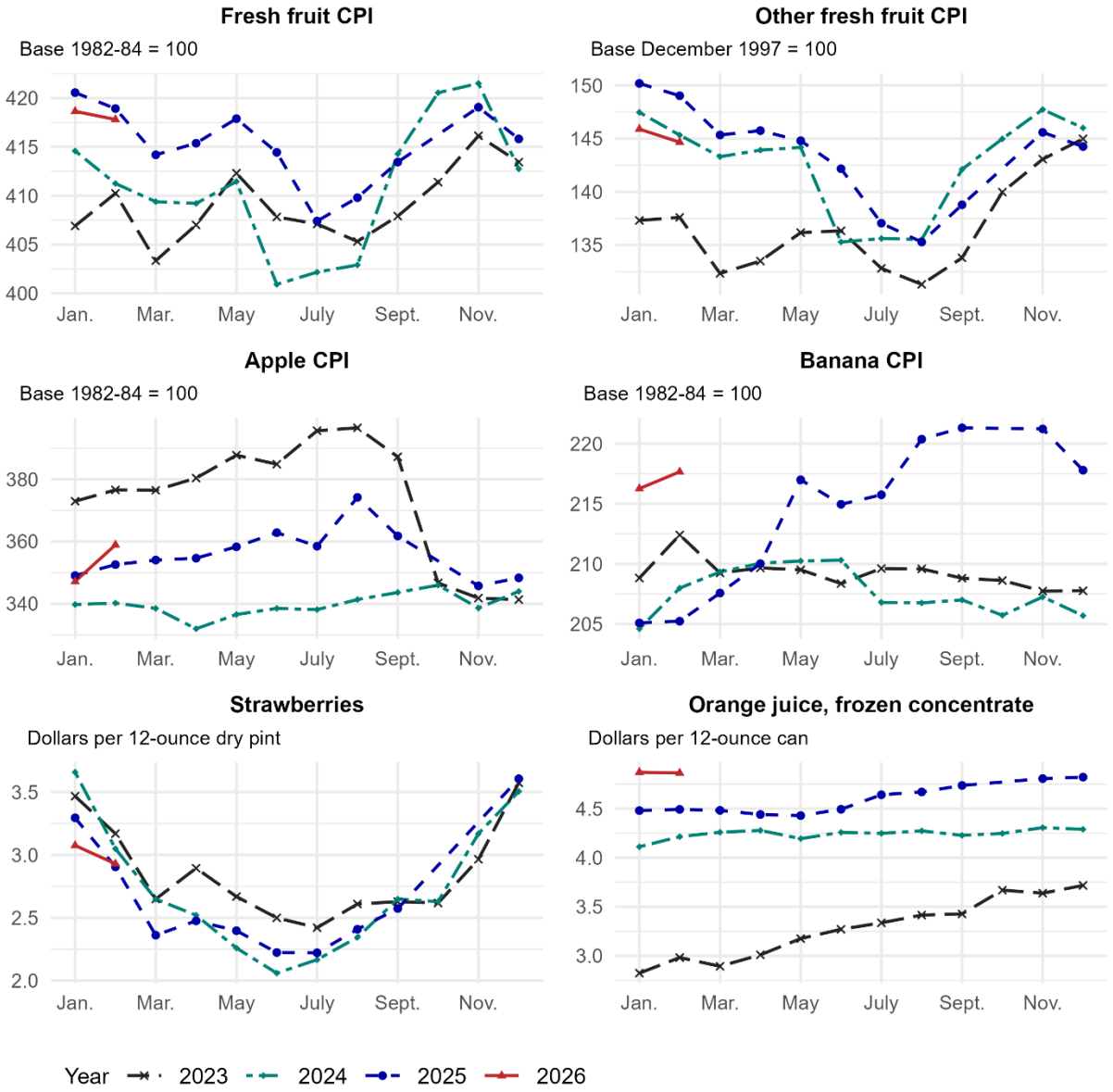
Consumer Price Index for fresh fruit in early 2026: The Consumer Price Index (CPI) for fresh fruit was reported at 417.8 (1982–84=100) in February 2026, down 0.3 percent from the same time last year according to data from the U.S. Department of Labor, Bureau of Labor Statistics (figure 2). Apple and banana prices are two of the most heavily weighted individual components in the fresh fruit CPI, accounting for 14 percent and 19 percent, respectively. The citrus fruit CPI (all citrus combined) accounts for 11 percent of the fresh fruit CPI. The “other fresh fruit” CPI accounts for the remainder of the relative weight of the fresh fruit CPI (55 percent). In February 2026, the other fresh fruit CPI was 3 percent lower compared to February 2025, which offset an increase in the apple CPI and banana CPI (up 2 percent and 6 percent, respectively).

Banana retail prices remain elevated in early 2026: Average national-level retail prices for bananas rose during 2025 and reached a high of $0.67 per pound in September. Though prices decreased slightly to $0.65 cents per pound by the beginning of 2026, average retail prices in February 2026 were 5 percent higher than February 2025. In calendar year 2025, banana imports to the United States decreased 3 percent year over year to 10.07 billion pounds, the lowest volume since 2013. Import volume decreased from three of the top four major suppliers:

Guatemala (down 4 percent), Costa Rica (down 23 percent), and Honduras (down 14 percent). Heavy rainfall, cooler temperatures, and tropical storms lowered banana supplies available for export in Guatemala and Costa Rica. With lower imports, preliminary per capita availability of fresh bananas is expected to decrease to 25.5 pounds per person in 2025, a year-over-year decrease of more than a pound and falling below 26 pounds for the first time since 2011.

Figure 2

U.S. monthly fresh fruit consumer price indexes and average retail prices, 2023–26



CPI = Consumer Price Index.
Source: USDA, Economic Research Service based on data from U.S. Department of Labor, Bureau of Labor Statistics.

Citrus Fruit Outlook

2025/26 California Citrus Production Forecast: Tangerines and Lemons Down, Oranges and Grapefruit Up

The USDA, NASS U.S. citrus crop forecast for 2025/26 is 4.93 million tons, a 2-percent decline from the 2024/25 final utilized total of 5.02 million tons, based on the January 2026 *Crop Production* report and the March 2026 *California Valencia Orange Objective Measurement Report*. This decrease primarily reflects smaller expected tangerine and lemon crops in California, coupled with continued contraction of Florida's citrus industry. Commercial production of citrus fruit is limited to regions with tropical to subtropical climates. Citrus trees are cold sensitive and exposure to temperatures below freezing for more than a few hours can destroy budding, lead to harvest losses, or even cause tree death.

The January 2026 USDA, NASS production forecast for Florida's 2025/26 citrus marketing year is based on packing house data and field measurements conducted prior to the end of December 2025. Thus, these estimates do not yet include additional losses from Winter storms Ezra (December 30, 2025–January 1, 2026) and Gianna (January 30–February 4, 2026) in Florida. The next USDA, NASS citrus forecast will be released on April 9, 2026. USDA, ERS expects further downward revisions to most, if not all, of Florida's citrus commodity forecasts for the 2025/26 season.

All orange production is up 2 percent: All orange production for the United States in the 2025/26 season (November–October) is forecast to increase 2 percent from 2024/25. This increase is due to a larger Valencia orange crop in California (up 16 percent). The January 2026 forecast for U.S. early, midseason, and Navel oranges remains unchanged from the previous season at 1.746 million tons.

USDA, NASS distinguishes between two primary categories of oranges in its quarterly (formerly monthly) citrus forecast: 1) early/midseason and Navel, and 2) Valencia. The former category includes varieties that are harvested between the months of October and March and which are preferred for fresh consumption. The latter category includes Valencia oranges, which typically have a later harvest season (March–July) and are preferred for the processing market. As a matter of convenience, we hereafter refer to the early/midseason and Navel category as non-Valencia oranges. In Florida, both Valencia and non-Valencia oranges are used for processing with smaller shares of each going to the fresh market (6 and 8 percent, respectively).

The January 2026 USDA, NASS forecast estimates non-Valencia orange production at 4.50 million boxes in Florida, a reduction of 2 percent from the previous season. Florida Valencia orange production is forecast at 7.50 million boxes, down 1 percent from the previous season. These reductions reflect higher-than-average fruit drop, lingering effects of Hurricane Milton (2024), and continued industry losses from Huanglongbing (citrus greening disease). Although both Valencia and non-Valencia trees are bearing more fruit per tree than last season, smaller sized fruit and increased droppage offset these gains.

The *California Valencia Orange Objective Measurement Report* released by the California Department of Food and Agriculture and USDA, NASS (March 10, 2026) indicates average Valencia orange size was 7 percent higher than the previous season and 5 percent above the 5-year average. California is forecast to have a larger Valencia crop this season with 8.50 million boxes, 11 percent above the 5-year average. The Golden State's non-Valencia crop is also expected to increase over last season to 38 million boxes, up 3 percent from the 5-year average. This increase in California orange production can be attributed to favorable weather conditions for orange production in addition to a favorable bearing-cycle year.

Texas generally accounts for less than 2 percent of U.S. commercial orange production. As of the January 2026 forecast, orange production (Valencia and non-Valencia) was up 6 percent compared to last year at 900,000 boxes. Despite the projected increase, production is still expected to remain 19 percent below the preceding 6-year average (excluding the exceptionally poor 2022 harvest due to Winter Storm Uri). This increase in Texas production likely reflects more favorable weather and a rise in bearing acreage compared with the 2024/25 season.

The United States is a net exporter of fresh oranges with the bulk of U.S. fresh orange exports occurring in the spring. Export volumes of fresh oranges are down 10 percent so far this season to date (November 2025–January 2026) compared to the same period last season. U.S. Bureau of the Census data show declines season to date in exports to Canada by 15 percent (a decrease of 10.1 million pounds), South Korea by 35 percent (a decrease of 9.9 million pounds) and Hong Kong by 11 percent (a decrease of 2 million pounds). In contrast, exports of oranges to Mexico increased 26 percent (an increase of 6.6 million pounds) over the same period last year. USDA, ERS forecasts total U.S. fresh orange exports to reach 730 million pounds (365,000 tons) in 2025/26, up 1 percent from last season. Higher export levels from the United States are expected this season given increased production in California.

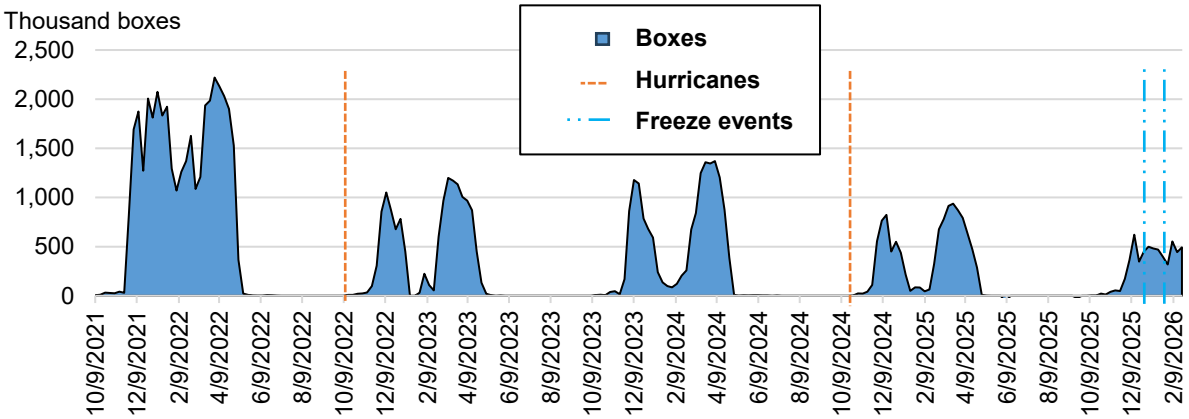
U.S. fresh orange imports begin increasing in May and peak in August and September, as they run counter seasonal to the domestic harvest (January–March). Historical import data suggests that only 10 percent of total annual import volume is reached by January of the given marketing

year. Imports of fresh oranges for the 2025/26 season to date (November 2025–January 2026) are up 13 percent compared to the same time last year. The majority of winter and early spring (December–April) fresh orange imports come from Mexico, which are currently up 17 percent year to date. Morocco is a top supplier during the late spring and early summer, accounting for about 7 percent of all fresh orange imports last season (2024/25). South Africa and Chile are major suppliers of fresh oranges to the United States during the summer months and early fall when imports peak, respectively accounting for 42 and 24 percent of fresh orange imports in the 2024/25 season.

The average on-tree equivalent grower price for a box of fresh oranges for the 5-month period covering September 2025–January 2026 is $26.97, up 15 percent from the same period last year. Higher production levels coupled with strong imports are expected to temper these prices in the coming months.

Florida orange juice production is forecast to new low: Based on current estimates, 39 percent of U.S. grown oranges will go to processing in the 2025/26 season. Most oranges for the processing market are grown in Florida. The combined orange harvest peaks twice in the State of Florida, with peak harvest of non-Valencia oranges occurring in December and early January and the peak of the Valencia orange crop occurring in March or early April (figure 3). Processing movement data from the Florida Department of Citrus suggest that Winter storms Ezra and Gianna occurred during a period of the year when less than half of Florida's processing orange crop had been harvested.

Figure 3
Movement of Oranges for Processing in Florida



Note: One box of Florida oranges weighs approximately 90 pounds. Box counts are approximate and calculated from reported pound solids and yield per box for both frozen concentrated orange juice and single-strength orange juice.
Source: USDA, Economic Research Service based on data from Florida Department of Citrus, *Weekly Processor Reports*.

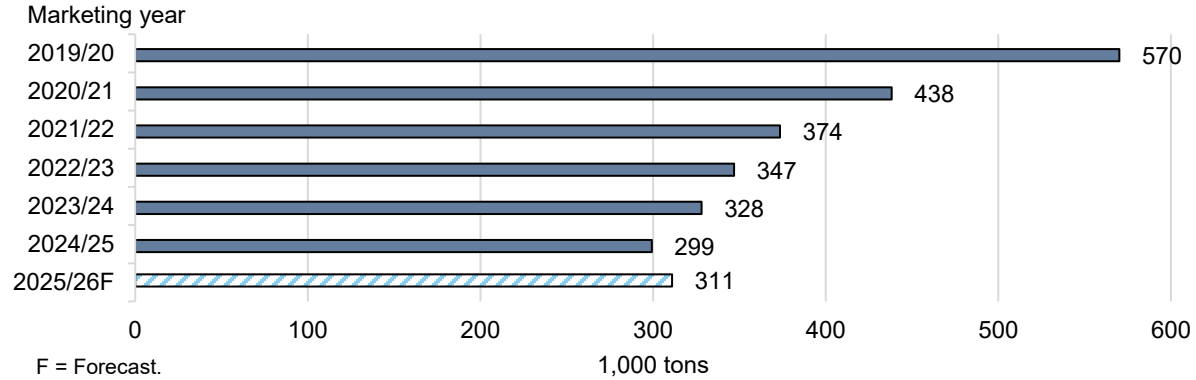
As of March 2026, the harvest of Valencia oranges in the State is still in the early stages. The average on-tree equivalent grower price for a box of oranges for the processing market reported by USDA, NASS over the months of December 2025–January 2026 was $9.07 per box, down

21 percent from the same period last year. These prices from the initial months of the 2025/26 season may be reflective of higher beginning stocks this season for frozen concentrated orange juice at 126 million single-strength equivalent (SSE) gallons, up 60 percent from the 2024/25 beginning stocks, as calculated from Florida Department of Citrus *Weekly Processor Reports* and USDA, NASS *Cold Storage* reports.

USDA, ERS forecasts orange juice production in 2025/26 to be down from last year, with total production at 99 million SSE gallons. If realized, this volume will likely be the lowest in U.S. history. To compensate for lower production, U.S. orange juice imports are expected to increase over last year reaching more than 580 million SSE gallons. Mexico and Brazil are the main suppliers of orange juice imports into the United States, accounting for a combined 94 percent in the 2024/25 season. Higher production volumes of orange juice are projected for Brazil in the 2025/26 season, which may also contribute to higher U.S. import volumes. U.S. exports of orange juice are expected to reach a new low of 30 million SSE gallons this season. Canada will remain the primary foreign destination for U.S. produced orange juice, accounting for more than two-thirds of all U.S. orange juice exports.

Grapefruit production is expected to be up in 2025/26: Total U.S. grapefruit production is projected up 4 percent to 311,000 tons in 2025/26 from 299 thousand tons in 2024/25 (figure 4). While the 2025/26 grapefruit production forecast is higher than last season, it is still 24 percent below the preceding 5-year average (2019/20–2023/24), reflecting a downward trend in grapefruit bearing acreage in Florida and Texas. California 2025/26 grapefruit production forecast is 172 thousand tons, a 5-percent increase over the 2024/25 season. Texas grapefruit production forecast is 88,000 tons in 2025/26, a 10-percent increase over last season. The USDA, NASS Florida grapefruit production forecast released in January 2026 was down 7 percent from the previous season.

Figure 4
Grapefruit: Production forecast is up 3 percent in 2025/26 but still below historic levels

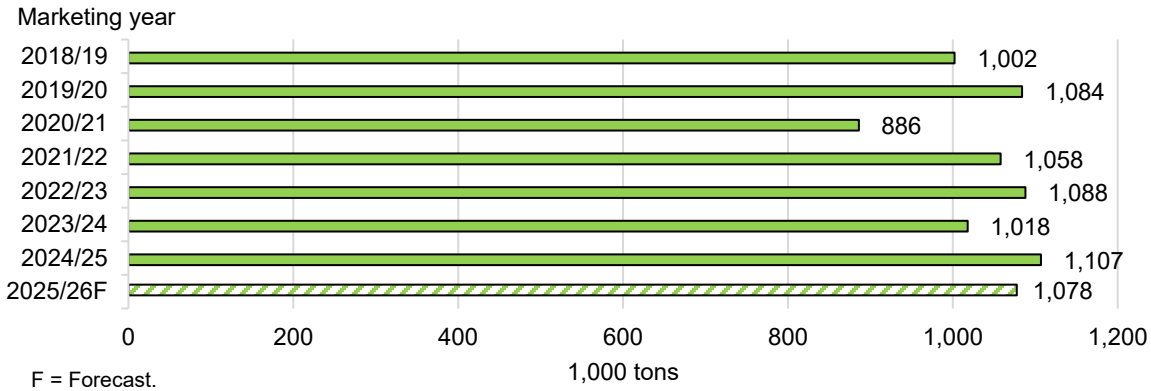


F = Forecast.
Note: The marketing year for fresh gapefruit begins in September and lasts through August of the following year.
Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, *Crop Production* (January 2026) and *Citrus Fruit Summary*, various issues.

The U.S. grapefruit harvest typically peaks during the winter and early spring. Approximately 65 percent of U.S. grown grapefruit goes to the fresh market on average (2020/21–2024/25). In February 2026, the grapefruit Producer Price Index (PPI) and U.S. average grapefruit retail price was lower than the same month last year (down 7 and 6 percent, respectively), according to the U.S. Department of Labor, Bureau of Labor Statistics. Lower grapefruit prices are to be expected over last season given increased production. Season-to-date fresh grapefruit exports were up 2 percent, driven by increased shipments to Mexico (up 1.7 million pounds) and South Korea (up 1.3 million pounds). Amid higher domestic production, U.S. fresh grapefruit import volumes for the current season (September 2025–January 2026), have been down by 27 percent compared with the same period in 2024/25.

Lemon production forecast is down in 2025/26: The U.S. lemon crop for the 2025/26 marketing season (August 2025–July 2026) is anticipated to be 1.08 million tons, down 3 percent from the 2024/25 final utilized production (figure 5). California, which accounts for 94 percent of U.S. commercial lemon output, is projected to produce 32,000 fewer tons in 2025/26 than last season (down 3 percent). The lemon production forecast in both Arizona and Florida is higher year over year (up 2 and 7 percent, respectively).

Figure 5
Lemons: forecast is down in 2025/26 due to smaller California crop



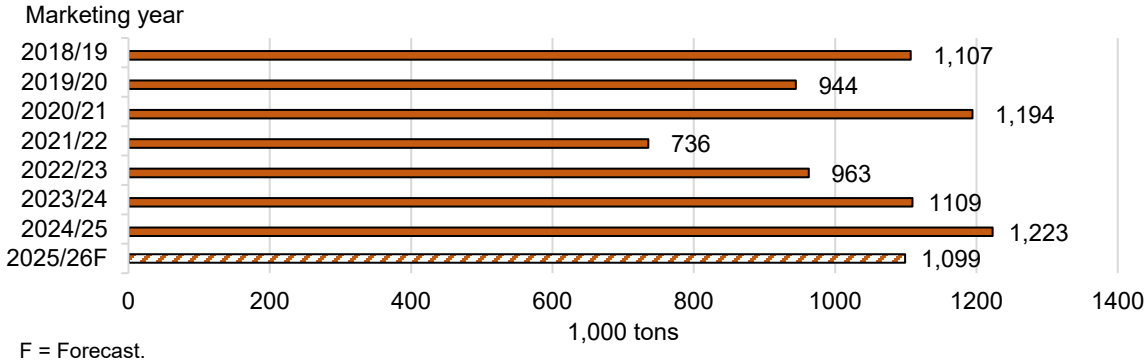
F = Forecast.
Note: The marketing year for fresh lemons begins in August and lasts through July of the following year.
Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, *Crop Production* (January 2026) and *Citrus Fruit Summary*, various issues.

Despite lower forecast production for this current season (August 2025–January 2026), fresh lemon grower prices (on-tree equivalent) averaged $29.77 per box, compared to $30.43 per box over the same period in 2024/25. Fresh lemon exports from the United States are highest in the winter and spring months during the harvest and typically peak between December and March. These exports are up 15 percent year to date (August 2025–January 2026)—with significant quantities going to Canada (47 percent), Japan (26 percent), and South Korea (11 percent). Fresh lemon imports run counter seasonal to peak U.S. production and are highest between

June and October. These imports are down year to date (August 2025–January 2026) by 21 percent, compared to the same period from 2024/25.

Tangerine, mandarin, and tangelo crops are forecast down from last season: Total production of U.S. tangerines (a commodity group including tangerines, mandarins, and tangelos) is forecast at 1.10 million tons in the 2025/26 season (November 2025–October 2026). If realized, this quantity will be a 10-percent decrease from final production levels in the 2024/25 season (figure 6). California accounts for approximately 98 percent of domestic tangerine production. California's 2025/26 tangerine forecast is 1.08 million tons (or 27 million boxes), a 124,000-ton reduction from last season's bumper crop. Part of this reduction may be due to an uncharacteristically wet bloom season. The 2025/26 Florida tangerine production forecast is 19 thousand tons, accounting for 1.7 percent of this year's crop.

Figure 6
Tangerines: forecast is down 10 percent in 2025/26 compared to last year



F = Forecast.
Note: The marketing year for fresh tangerines begins in Novemeber and lasts through October of the following year.
Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, *Crop Production* (January 2026) and *Citrus Fruit Summary*, various issues.

U.S. tangerine exports are highest in the winter and spring months and typically peak between February and April. Despite lower forecast production, tangerine exports (including mandarins, clementines, and similar citrus hybrids) are up 25 percent season to date, with a 30-percent increase in exports to Canada and a 46-percent increase in exports to Mexico.

U.S. fresh tangerine domestic availability has more than doubled since the early 2000s, due to an upward trend in both U.S. tangerine production and U.S. fresh tangerine imports. During the last 3 marketing years, fresh tangerine imports accounted for 44 percent of domestic availability. So far this season (November 2025–January 2026), fresh tangerine imports are down by 63 percent—with smaller quantities coming from Morocco, Chile and Peru. The 2025/26 tangerine production and export forecast for Morocco, Chile and Peru is higher year over year according to the USDA, Foreign Agricultural Service's *Citrus: World Markets and Trade* report released in January 2026.

Noncitrus Fruit Outlook

Winter Strawberry Shipments Are Lower, Prices Higher

USDA, NASS reports annual strawberry production data for two major-producing States, California and Florida. Florida accounts for about 10 percent of domestic production and is a winter-spring strawberry producer. Strawberry shipments from Florida begin in November and end in April, with about two-thirds of the State's volume shipping in February and March. California accounts for about 90 percent of national production and is a year-round strawberry producer, with almost 90 percent of volume shipped between April and October.

In 2025, fresh strawberry shipments from Florida and California were similar to the previous year (down less than 1 percent). California shipments were 4 percent lower but offset by a 25-percent increase in volume from Florida. Strawberry shipments from Florida in the first 4 months of 2025 were 14 percent higher than the same period the year before. Florida strawberry growers have continued to increase acreage in the central region of the State. Late season shipments from California were light in the last quarter of 2025. Heavy rainfall in the Santa Maria and Oxnard growing regions resulted in harvest delays and cancellations, resulting in end-of-year shipment volumes (October–December 2025) 27 percent lower year over year.

2025 U.S. fresh strawberry exports are the third highest level on record: The volume of fresh strawberries exported by the United States decreased to 309.4 million pounds in 2025. Although 13 percent lower than the 2024 record of 357.4 million pounds, fresh strawberry exports were the third highest on record in 2025. Almost 90 percent of U.S. fresh strawberry exports are destined for Canada or Mexico. In 2025, strawberry exports to Canada decreased 6 percent while exports to Mexico fell 23 percent. U.S. organic fresh strawberry exports accounted for about 4 percent of export volume (12 million pounds) and decreased for the fourth consecutive year.

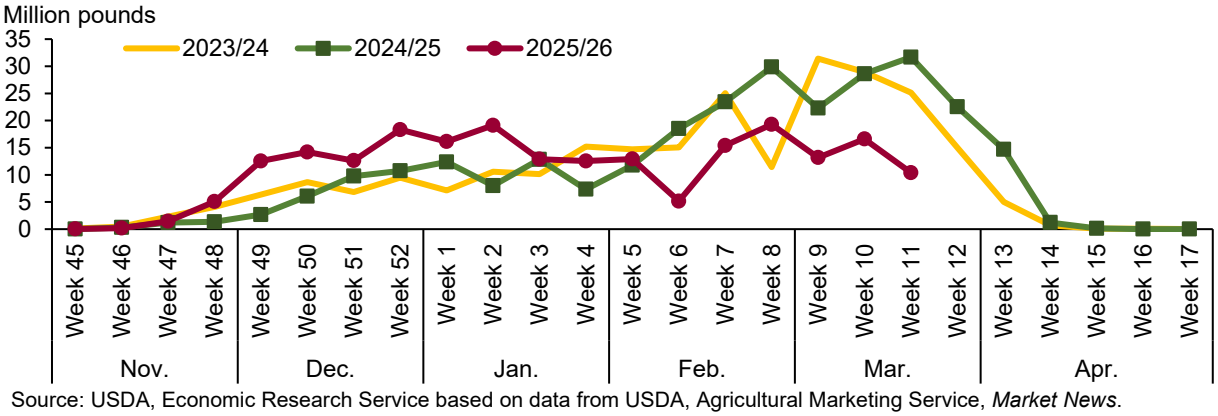
Record high fresh strawberry imports in 2025: The volume of fresh strawberries imported to the United States increased 1 percent to a new record high of 590 million pounds in 2025. The value of U.S. fresh strawberry imports decreased for the second year in a row to $1.04 billion on lower import unit values (down 11 percent). Almost all (about 98 percent) U.S. fresh strawberry imports are from Mexico. About 80 percent of imported fresh strawberries enter from December to April, when the volume of domestically grown strawberries is lower. Like the United States, strawberries are grown in different regions throughout Mexico, which allows for near year-round strawberry availability. Much of Mexico's strawberry production is concentrated in Baja California in the west and in central Mexico, including the States of Michoacán and Guanajuato.

California strawberry acreage: U.S. strawberry acreage is expected to increase in 2026, based on data from the California Strawberry Commission (CSC) released in December 2025. The CSC conducts annual acreage surveys for California strawberries planted in the fall (for winter, spring, and summer production) and planted in the summer (for fall production). In 2026, total strawberry acreage in California is expected to be about 43,700 acres, an increase of about 2 percent from last year's estimate. About three-quarters of California's strawberry acreage is fall-planted. While California produces strawberries throughout the year, fresh strawberry shipments typically peak between May and August each year.

More strawberry acreage in Florida this season: The CSC 2025/26 strawberry acreage estimate for Florida is about 19,100 acres, an increase of 4.5 percent from last season's estimate. If realized, this season would mark the sixth consecutive year of increasing strawberry acreage and a 67-percent increase in acreage since 2019/20. Strawberry acreage in Florida is concentrated in the central part of the State, with Hillsborough County accounting for about 75 percent of Florida's acreage. USDA, ERS cash receipts indicate that strawberries accounted for 56 percent of Florida's fruit and nut receipts in 2024, exceeding the combined value of Florida oranges, grapefruit, and tangerines.

Florida is a winter-spring strawberry producer, shipping from November to April with the highest volume in February and March (figure 7). From November 2025 through January 2026, weekly strawberry shipments from Florida were trending higher than the previous season. However, widespread freezing temperatures during Winter Storm Gianna in late January and early February reduced volumes. Weekly shipments rose in late February but remained below last season's levels through mid-March.

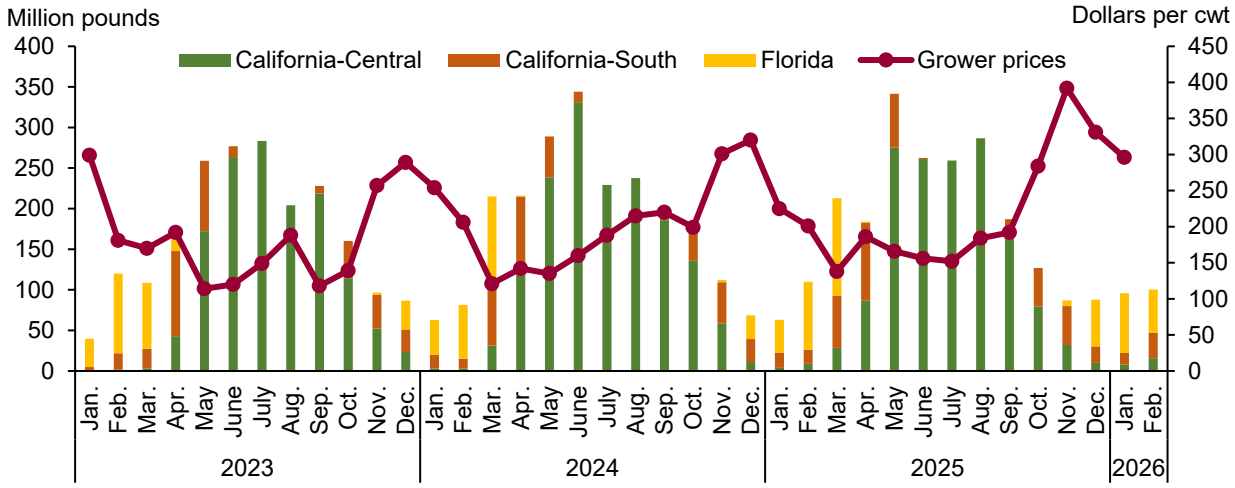
Figure 7
Weekly strawberry shipments from Florida, November to April, 2023/24 to 2025/26



Source: USDA, Economic Research Service based on data from USDA, Agricultural Marketing Service, *Market News*.

Strawberry prices tend to have strong seasonal trends. Lower prices are typical in the summer when domestic volume is higher, and higher prices are typical in the winter when domestic volume is lower (figure 8). Grower prices for strawberries were higher in January 2026 at $296 per hundredweight (cwt) or $2.96 per pound, an increase of 32 percent from $2.25 per pound in January 2025. Cold weather and freeze damage from winter storms slowed crop growth and lowered shipments of Florida strawberries early in the year. Strawberry average free-on-board (FOB) shipping point prices and advertised retail prices from USDA, AMS began to decline in late February and early March, as shipment volume of California strawberries increased.

Figure 8
Domestic strawberry movement and grower prices shift seasonally



Cwt = hundredweight, a measure equal to 100 pounds.
Note: Movement data are for Florida and California only. North Carolina is not included.
Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service and USDA, Agricultural Marketing Service, *Market News*.

Fresh Blueberry Imports Hit Record Highs in 2025

USDA, NASS reports annual production data for both cultivated blueberries and wild blueberries in the United States. Most U.S.-grown blueberries are cultivated (highbush) varieties. USDA, NASS publishes annual cultivated blueberry production for eight States: Washington, Oregon, Georgia, Michigan, California, North Carolina, New Jersey, and Florida. Wild (lowbush) blueberries are grown in Maine, with production concentrated along the State's eastern coast. U.S. blueberries are typically harvested between April and September, with peak domestic fresh blueberry shipments occurring from May to July. The domestic blueberry season begins in the Southeast, starting in Florida in late March and followed by Georgia in April.

USDA, NASS will release its 2025 annual production estimates for blueberries in May 2026 in the *Noncitrus Fruits and Nuts 2025 Summary*. In the meantime, USDA, AMS shipment data indicate that U.S. fresh blueberry shipments declined year over year in 2025. Shipments decreased in all surveyed States except Oregon and New Jersey. The North America Blueberry

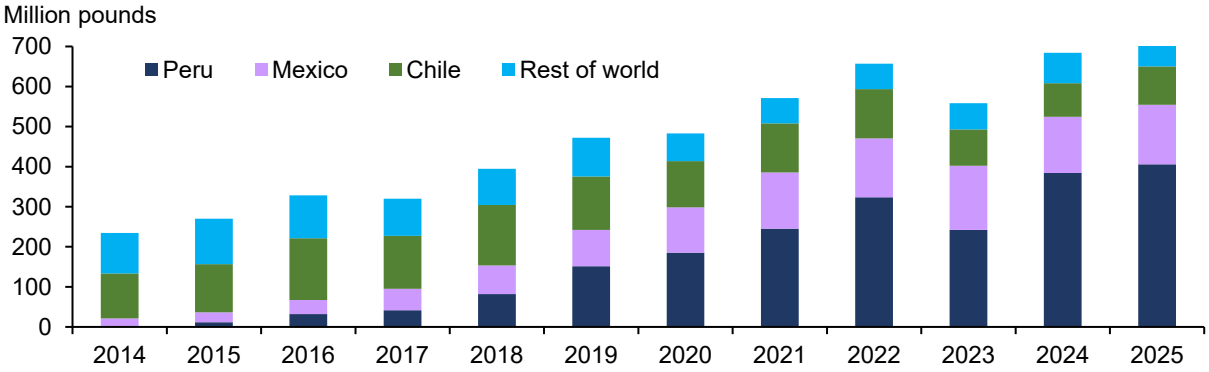
Council's (NABC) *Blueberry Crop Report*, released in October 2025, also reports lower 2025 U.S. blueberry production for cultivated (or highbush) blueberries compared with 2024. NABC's 2025 forecast for U.S. highbush blueberry production is 9 percent lower than its 2024 estimate. Though NABC estimates lower year-over-year blueberry production, most of the decrease is in blueberries for processing rather than fresh-market blueberries.

The NABC estimate for Maine's 2025 lowbush blueberry crop is 45 million pounds. If realized, the 2025 lowbush crop would be 50 percent smaller than the 90.8 million pounds estimated for the 2024 crop by USDA, NASS. In 2025, rainy conditions in the spring and early summer disrupted wild blueberry pollination. Maine's blueberry crop was further hindered by heat and severe drought conditions that began in late July and August and persisted through the fall.

U.S. fresh blueberry exports: Fresh U.S. blueberry export volume was 94.8 million pounds in 2025, a decrease of 9 percent from 2024's record high of 104.3 million pounds but still the second highest on record. Fresh wild blueberry exports, which make up about 15 percent of fresh blueberry exports by volume, decreased 46 percent year over year to 14.4 million pounds on lower domestic production in Maine. Fresh cultivated blueberry exports increased 4 percent to a record high of 80.4 million pounds. This increase is in part due to fresh organic cultivated blueberry export volume, increasing 54 percent year over year to a record high of 13.4 million pounds.

Record high fresh blueberry imports in 2025: From 2022 to 2024, U.S. blueberry imports accounted for about 65 percent of U.S. fresh blueberry domestic availability. In 2025, fresh blueberry import volume was 719.8 million pounds, an increase of 5 percent year-over-year and surpassing 2024's record high volume of 684.1 million pounds (figure 9). Fresh cultivated blueberry imports, which make up almost all fresh blueberry imports by volume, increased 6 percent in 2025 on higher volumes from the top three suppliers: Peru, Mexico, and Chile.

Figure 9
Fresh blueberry imports reach record high volumes in 2025

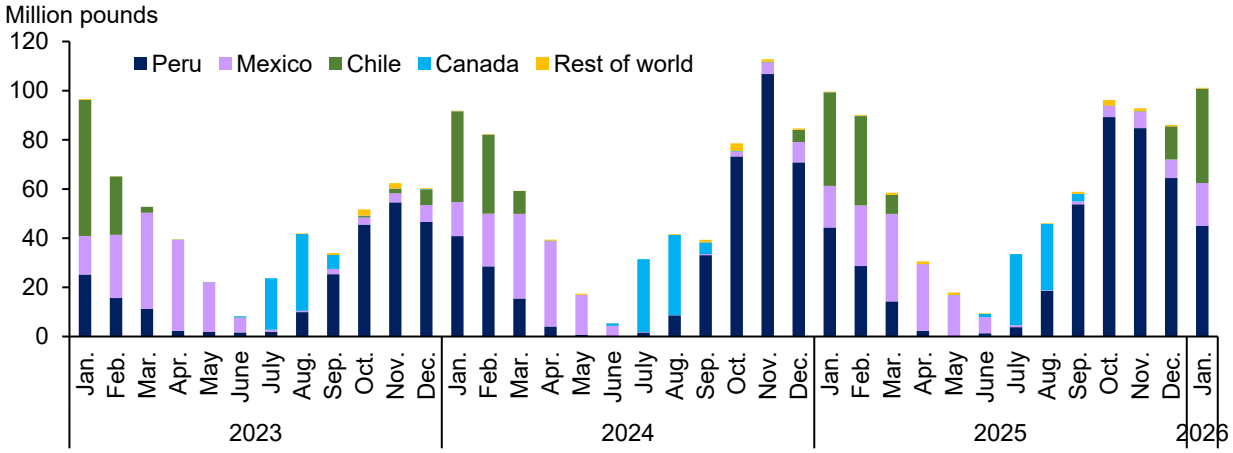


Note: Fresh blueberries include both cultivated and wild.
Source: USDA, Economic Research Service based on data from U.S. Department of Commerce, Bureau of the Census.

Fresh blueberry imports are seasonal: Historically, Chile was the top exporter of fresh blueberries to the United States. Peru surpassed Chile in 2019, and Mexico followed in 2021. Both Peru and Mexico have expanded their blueberry industries in recent years. U.S. blueberry imports from Mexico are highest from February to May, while volume is highest from Peru between September and February (figure 10).

Fresh blueberry imports from Peru have increased steadily over the last decade. The import volume of fresh blueberries from Peru averaged 15.5 million pounds from 2014 to 2016. In 2025, Peru exported a record high 405.9 million pounds of fresh blueberries to the United States and accounted for 56 percent of import volume. Blueberry production has expanded rapidly in Peru—with most blueberries for export grown in the regions of La Libertad, Lambayeque, Áncash, and Piura along the northern portion of Peru's coastline.

Figure 10
Monthly fresh bluebery imports shift seasonally, 2023 to January 2026



Source: USDA, Economic Research Service based on data from U.S. Department of Commerce, Bureau of the Census.

From January to mid-March 2026, about 99 percent of all U.S. fresh blueberry shipment volume reported by USDA, AMS *Market News* was imported. Early season domestic fresh blueberry shipments will start to increase in April and May, with domestic shipments typically peaking in July. Shipments from Florida will begin in late March, followed by Georgia in April. Widespread, prolonged freeze events in early 2026 in the Southeast are expected to hinder the blueberry crop in Florida and early season varieties in Georgia.

Blueberry prices were higher in early 2026. USDA, AMS FOB shipping point prices for conventional blueberries (all imported) averaged between $28.10 and $31.15 per flat (12 1-pint cups with lids, large item sizing) through week 10, higher than the same period last year. U.S. monthly advertised retail prices for blueberries averaged $3.21 per 6-ounce package in January 2026 and $3.55 per 6-ounce package in February 2026, an increase of 14 percent and 10 percent from the same months in 2025, respectively.

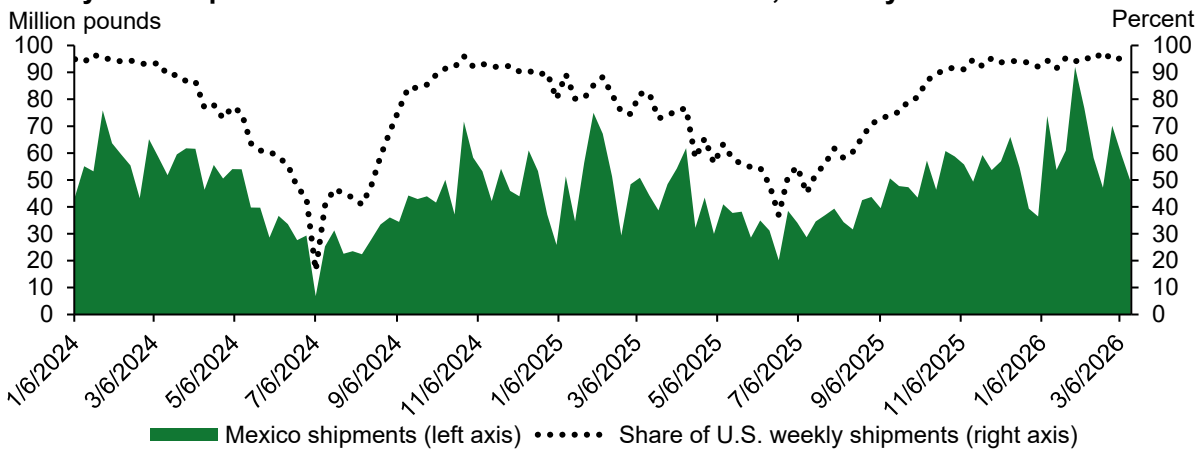
California Avocado Production Forecast Is Up in 2026

The California Avocado Commission (CAC) estimates that California will produce 330 million pounds of avocados in marketing year 2025/26 (November–October), up 1 percent (4.4 million pounds) from the 2024/25 estimate. Most of the 2025/26 crop is expected to consist of the Hass avocado variety (94 percent, or 310 million pounds) or Hass-like varieties (example, Lamb and Gem). The Florida Avocado Administrative Committee's 2026 forecast is 24.75 million pounds (or 450,000 55-pound containers), a 14-percent decline from last year's production estimate. Most avocados that are grown in Florida consist primarily of green-skinned varieties (also referred to as non-Hass-like avocados).

U.S. avocado import volume record high set in 2025: In calendar year 2025, the United States imported a record 2.87 billion pounds of fresh avocados, 7 percent more than in 2024 and 3 percent above the previous record set in 2023. Fresh avocados from Mexico accounted for 83 percent of U.S. import volume and 88 percent of value. Most imports were Hass-like varieties, totaling 2.78 billion pounds and representing 97 percent of volume. Non-Hass like imports made up the remaining 3 percent (90 million pounds), nearly all supplied by the Dominican Republic.

Increased avocado shipments from Mexico: The United States imports avocados from Mexico year-round, but shipments—and Mexico's share of total U.S. shipments—are highest in the fall and winter months. In 2026, shipments from Mexico followed typical seasonal patterns, peaking at 92 million pounds in the week ending January 31, about one week before the Super Bowl, according to USDA, AMS *Market News* data (figure 11). Between January and mid-March 2026, shipments from Mexico were 24 percent higher than during the same period in 2025.

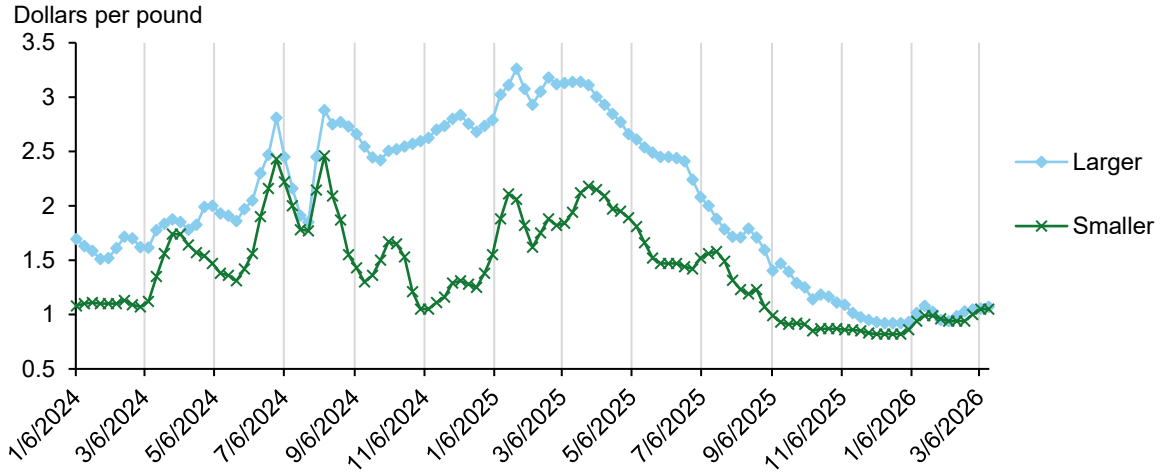
Figure 11
Weekly U.S. shipment volumes of avocados from Mexico, January 2024–mid-March 2026



Note: Mexico's share of U.S. fresh avocado weekly shipment volume represents the percentage of all shipments, including domestic origin and imports, reported by the USDA, Agricultural Marketing Service, *Market News,* movement data.
Source: USDA, Economic Research Service using data from USDA, Agricultural Marketing Service, *Market News*.

Larger fruit and lower prices: The Mexican Hass Avocado Importer Association (MHAIA) reported higher season-to-date shipments through week 33 of the Mexican crop season (July 2025–early-March 2026). This rise in shipments has also coincided with an increased share of larger sized fruit compared with the same period a year ago. So far this season, larger sized avocados accounted for 50 percent of shipment volume to the United States, compared with 40 percent in 2024/25. During Mexico's 2024/25 season, drought and heat reduced average fruit size, resulting in the lowest share of medium and large size avocado shipments in the last decade. More favorable weather conditions during Mexico's 2025/26 season have resulted in increased volumes of medium and large size avocados. In late 2025 and early 2026, increased availability of larger sized Hass avocados from Mexico put downward pressure on prices and narrowed the price premium over smaller sized fruit (figure 12). In mid-March 2026, average FOB shipping point prices[1] for larger size Hass avocados from Mexico have remained close to $1 per pound, about one-third the average price during the same period a year ago.

Figure 12
FOB prices for Hass avocados from Mexico, January 2024–mid-March 2026



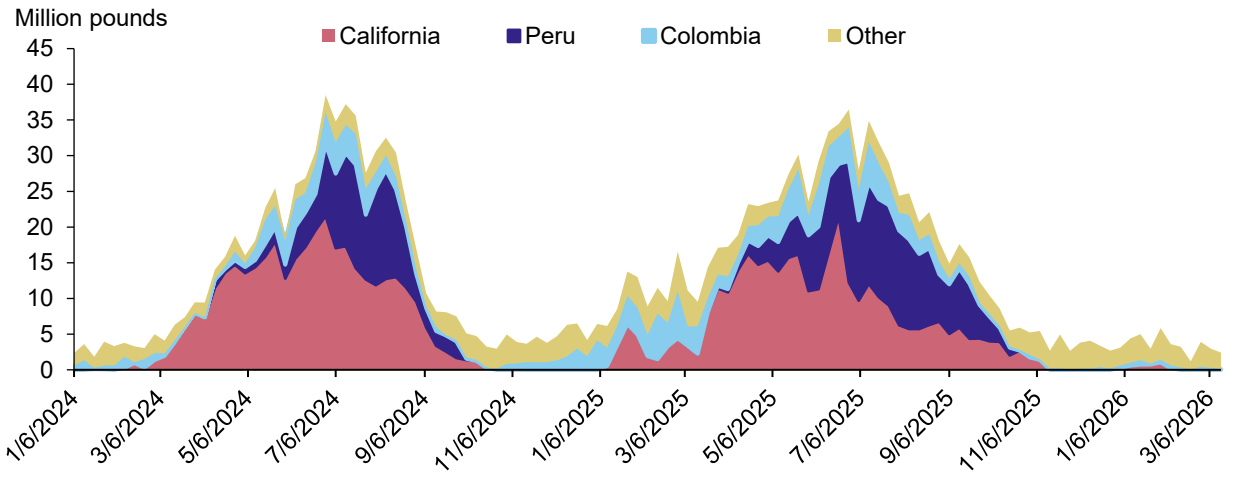
FOB = Free-on-board shipping point.
Note: Average weekly FOB prices by fruit size for conventional Hass avocados in 2-layer cartons from Mexico. Fruit size is identified by the approximate number of avocados in a 25-pound carton holding 2 layers of avocados. Larger size includes 2-layer cartons holding 32 to 48 avocados. Smaller size includes 2-layer cartons holding 60 to 70 avocados.
Source: USDA, Economic Research Service using data from USDA, Agricultural Marketing Service, *Market News*.

California's summertime avocado shipments: California avocado shipment volumes increase seasonally through the spring and peak during the summer months before winding down in early fall. In 2025, the latter half of the California avocado season coincided with increased fresh avocado imports from Peru (figure 13). U.S. avocado shipments from Peru totaled 218 million pounds in 2025, accounting for about 7 percent of total U.S. avocado shipments (domestic origin and imports reported by USDA, AMS *Market News*). About 70

[1] USDA, AMS *Market News* FOB shipping point prices of imported produce represent the sale price at the crossing point or port of import, with any duties, crossing charges, or import fees paid prior to the reported sale.

percent of U.S. avocado shipments from Peru occurred between June and August. During this period, the U.S. average weekly FOB prices for Hass avocados trended lower with Peruvian avocado prices generally lower than both California and Mexico prices.

Figure 13
Weekly shipment volumes for avocados by origin (excluding Mexico), 2024–mid-March 2026



Note: Volumes include all fresh avocado varieties. Other origins include imports (excluding shipments from Mexico) and domestic shipments from Florida.
Source: USDA, Economic Research Service using data from USDA, Agricultural Marketing Service, *Market News*.

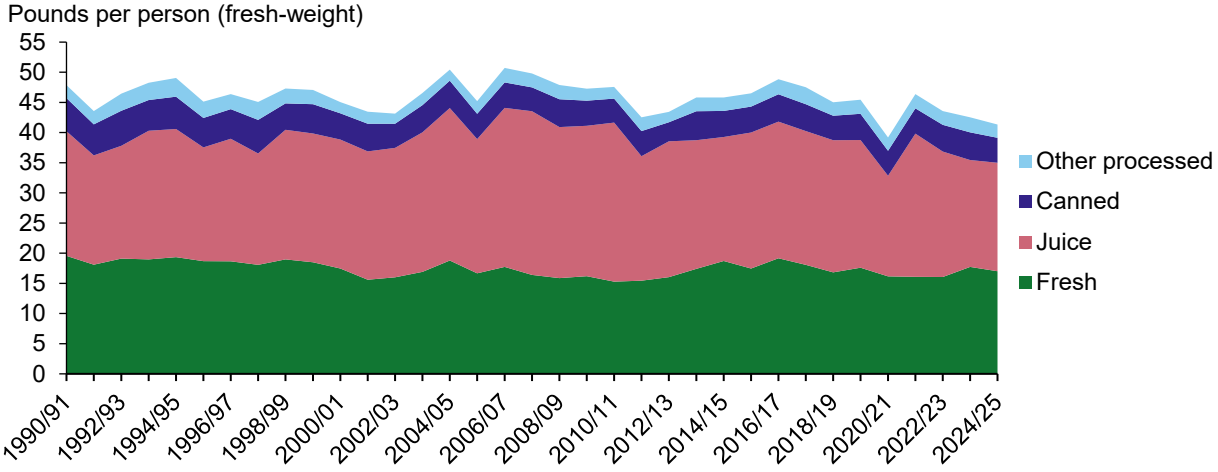
Avocado shipments from Colombia reached a record high in 2025, accounting for 4 percent of U.S. avocado shipments. Avocado shipments from Colombia last year had less of a seasonal concentration compared to Peru, with more than 80 percent of volume spread between January and July. Peru and Colombia are the second and third largest avocado exporters in the world behind Mexico, according to 2024 and 2025 export volume data published by Trade Data Monitor, LLC. However, unlike Mexico (whose primary avocado export market is the United States), more than half of Peru's and Colombia's fresh avocado exports go to the European Union.

Outlook for 2026: Lower avocado prices and higher volumes from Mexico have led to a slow start for early-season California avocado shipments. By March 15, 2026, CAC reported year-to-date avocado shipments from California were 3 percent of the forecasted crop—lagging the previous 4-year historical average of 8 percent. In 2026, CAC handlers' projections increase weekly California avocado shipment volumes throughout April with a peak weekly forecast ahead of Independence Day (almost 17 million pounds). Avocado harvest in Michoacán, the primary avocado-producing state in Mexico, will move up in elevation from April through June. The variation in elevation and microclimates in Michoacán allow for four bloom periods each season and year-round avocado harvest. Avocado shipments from the Mexican state of Jalisco are expected to trend lower in the spring and early summer, as the 2025/26 Mexico avocado season (July–June) ends.

U.S. Fresh Apple Exports Are Up in 2025/26

Apple per capita availability: In marketing year (MY) 2024/25 (August–July), apple availability, a proxy for consumption, was 41.3 pounds per person on a fresh farm-weight basis according to the USDA, ERS *Fruit and Tree Nuts Yearbook* (figure 14). Since MY 1990/91, estimated apple availability per person has ranged between 39 and 51 pounds per person. Two primary drivers of year-over-year changes in apple availability estimates during this time were changes in annual domestic apple production and variation in apple juice import volume. Apple juice represented 43 percent of MY 2024/25 apple availability, 18 pounds per person on a fresh-weight basis or about 1.5 gallons per person in single-strength equivalent (SSE). Fresh apples accounted for 41 percent (17 pounds per person). The remaining 15 percent of U.S. apple availability in MY 2024/25 was made of canned, frozen, dried, and other processed forms. In the last decade, domestic apple producers supplied more than 90 percent of fresh-market apple availability in the United States. In contrast, imports represented about 80 percent of domestic apple juice availability during the same period.

Figure 14
U.S. apple per capita availability is led by juice and fresh-market categories



Note: U.S. apple marketing year begins in August and ends in July of the following year. The other processed apple category includes frozen, dried, and other miscellaneous uses like vinegar and apple slices. Juice, canned, and other processed categories were converted to a fresh farm-weight equivalent.
Source: USDA, Economic Research Service based on data from the USDA, ERS *Fruit and Tree Nuts Yearbook, Table A-1* (February 2026).

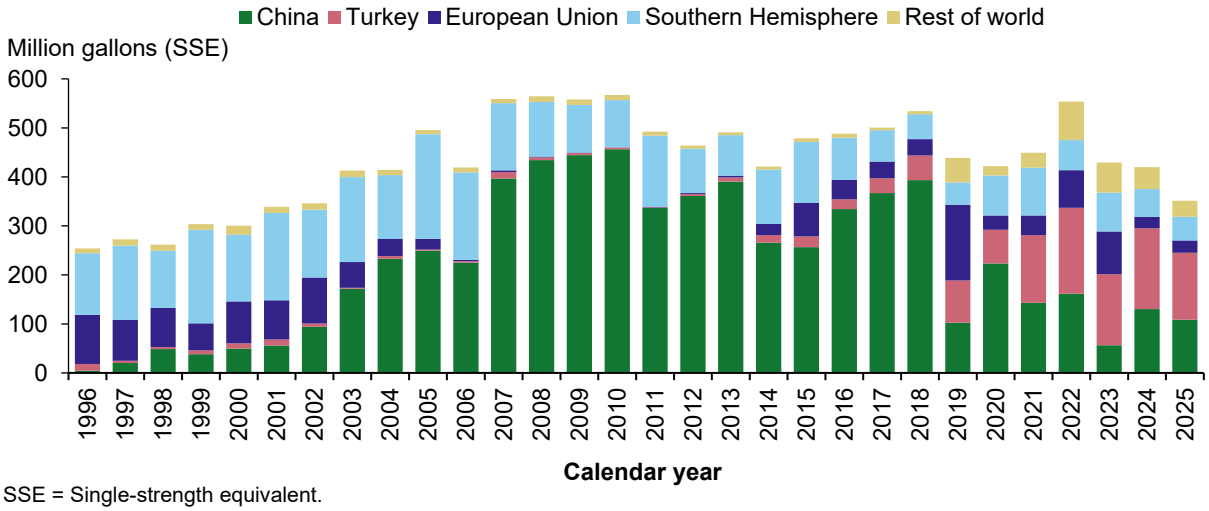
Fresh apple exports are up halfway through MY 2025/26: The United States is a net exporter of fresh apples. U.S. fresh apple export volume in MY 2024/25 totaled 1.85 billion pounds, valued at $1 billion. U.S. fresh apple export volume in the first half of MY 2025/26 (August–January) was 1 billion pounds, 5 percent higher than the same time last season and the largest volume for that period in 8 years. Almost half of total season-to-date U.S. fresh apple exports went to top trading partners Mexico (329.4 million pounds) and Canada (160.6 million pounds). Double-digit year-over-year increases in apple exports to Mexico (up 16 percent) and Canada

(up 22 percent) offset lower volumes to Vietnam (down 24 percent). Organic apples represented 20 percent of U.S. fresh apple export volume (203 million pounds) with Mexico accounting for 65 percent of volume. Excluding Mexico and Canada, the United States exported more than 10 million pounds of fresh apples to 16 different countries in MY 2025/26 (August–January).

U.S. juice import volume drops to multidecade low in 2025: In calendar year 2025, U.S. apple juice import volume on a single-strength equivalent (SSE) (i.e., nonconcentrated) was 351 million gallons, a 16-percent decrease from 2024 and the lowest volume since 2002. While import volume declined from 2024 and 2025, the share of U.S. apple juice imports from the top 2 countries remained the same: Turkey (39 percent) and China (31 percent). Non-frozen apple juice concentrate was the primary form of U.S. apple juice imports (as opposed to frozen concentrate or non-concentrate juice). Last year, non-frozen apple juice concentrate represented more than 80 percent of import volume (SSE) and 76 percent of import value.

Shifts in U.S. apple juice imports: Turkey and China have not always been the top two suppliers of U.S. apple juice imports. In the 1990s, apple juice imports came primarily from Southern Hemisphere countries and the European Union (figure 15). In the 2000s, an increase in China's apple-juice-processing capacity led to China becoming a leader in global apple juice exports with the United States becoming its largest market.[2] By 2004, China's share of U.S. apple juice imports exceeded 50 percent.

Figure 15
U.S. apple juice import volume by origin, 1996–2025



SSE = Single-strength equivalent.
Note: Import data is converted from liters to gallons assuming one liter is 0.26 gallons. Import volumes in SSE includes apple juice liquid concentrate, frozen concentrate, and non-concentrated liquid. Only includes apple juice trade codes under the International Harmonized Commodity Coding and Classification System (HS) 6-digit level codes 2009.70, 2009.71, and 2009.79. Southern Hemisphere countries include Argentina, Brazil, Chile, South Africa, Australia, and New Zealand.
Source: USDA, Economic Research Service based on data from U.S. Department of Commerce, Bureau of the Census.

[2] Gale, F., Huang, S. & Gu, Y. (2010). *Fruit and Tree Nuts Outlook: October 2010*. U.S. Department of Agriculture, Economic Research Service. FTS-344-01.

Total U.S. apple juice imports peaked in 2010 at 567 million SSE gallons with almost all volume from China (80 percent) and Southern Hemisphere countries[3] (17 percent). From 2011 and 2018, annual U.S. apple juice imports ranged between 421 and 534 million SSE gallons, with China representing more than half of U.S. import volume each year. Following increased tariffs on apple juice concentrate from China, U.S. apple juice imports from China fell 74 percent year over year, from 393 million SSE gallons in 2018 to 102 million SSE gallons in 2019. Import volumes from China have continued to remain below pre-tariff levels over the last 7 years. China's share of U.S. apple juice import volume has fallen from 80 percent in calendar years 2009–10 to about 30 percent in 2024–25. While annual import volumes from the European Union and Southern Hemisphere countries have fluctuated over time, Turkey has emerged as a major apple juice exporter to the United States. Since 2022, Turkey has exported more apple juice to the United States each year than any other country.

[3] Southern Hemisphere countries include Argentina, Brazil, Chile, South Africa, Australia, and New Zealand.

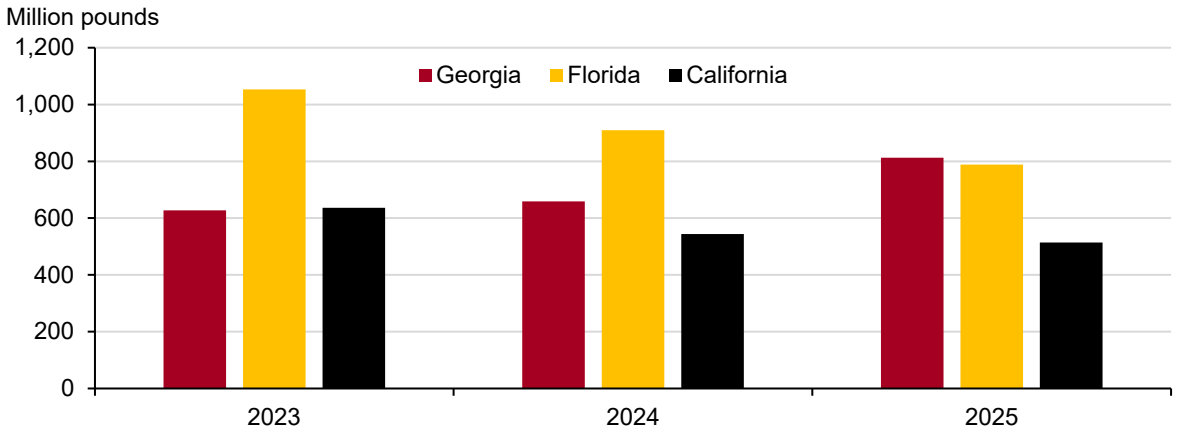
Melons Outlook

Watermelon

U.S. watermelons are available from April to October, with domestic shipments typically highest from June to August. USDA, NASS reports annual watermelon production data for 10 States: Georgia, Florida, California, Texas, North Carolina, Indiana, Maryland, South Carolina, Arizona, and Delaware. In 2025, watermelon utilized production was 3.84 billion pounds, a 5-percent increase from the 2024 crop. Georgia, Florida, and California collectively account for 55 percent (2.12 billion pounds) of U.S. watermelon production. Georgia surpassed Florida as the leading producer in 2025, supported by increased acreage and above average yields (figure 16). Planted acreage of watermelons in Georgia rose to 18,900 acres, the highest since 2018. While planted acreage for watermelons in Florida was unchanged in 2025 at 24,000 acres, harvested acreage decreased by 2,700 acres year over year to 21,000 acres.

Figure 16

Watermelon utilized production for top 3 States, 2023 to 2025



Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service.

The 2025 watermelon crop was valued at $741 million, a 9-percent increase from the 2024 season. Average grower prices increased 4 percent from $18.60 per hundredweight (cwt) in 2024 to $19.30 per cwt in 2025. Higher domestic production and imports coupled with lower exports increased per capita availability 4 percent year over year to 15.4 pounds per person in 2025, up from 14.8 pounds per person in 2024 and the highest since 2018.

U.S. fresh watermelon exports decreased 9 percent year over year to 363.4 million pounds in 2025. The primary export destination for fresh U.S. watermelon is Canada, accounting for about 98 percent of exported volume. Watermelon exports to Canada fell 11 percent by volume year over year in 2025. The value of fresh watermelon exports decreased 31 percent to $80.7 million on lower volume and unit values.

U.S. fresh watermelon imports in 2025 increased 1 percent to 1.80 billion pounds, just below 2023's record high volume of 1.81 billion pounds. Mexico is the main supplier of fresh watermelon imports to the United States, accounting for about 80 percent of volume. In 2025, higher watermelon imports from Guatemala, the second largest watermelon supplier to the United States, offset a 3-percent year-over-year decline from Mexico. The value of fresh U.S. watermelon imports increased 3 percent to $452.7 million.

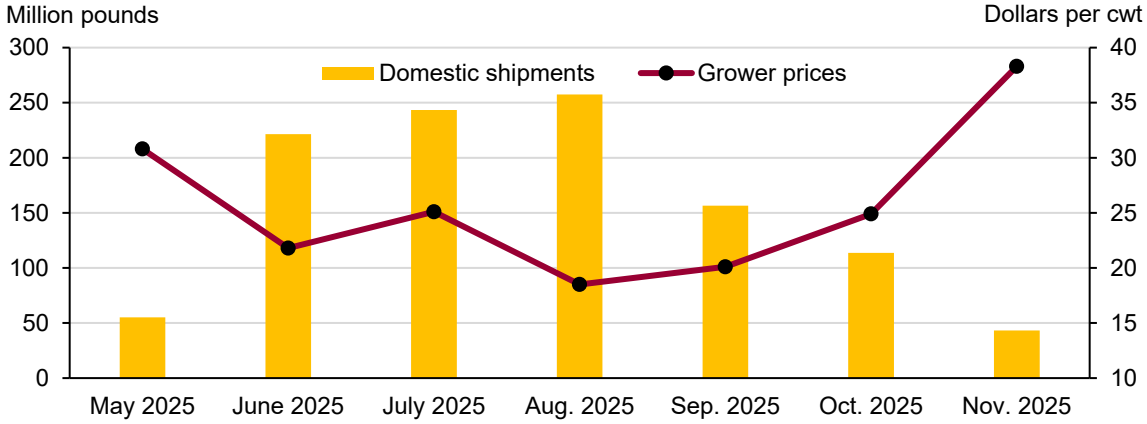
The domestic watermelon season will not begin until late March when Florida begins harvesting. From January to mid-March 2026, watermelon shipments (all imported) were lower than the same period the previous year. Watermelon shipments were lower year to date from the top three suppliers, Mexico, Guatemala, and Honduras.

Watermelon average FOB shipping point prices and advertised retail prices published by USDA, AMS were higher in early 2026. Conventional red flesh seedless watermelon FOB shipping point prices typically averaged between $277.05 and $295.75 per 24-inch bin (approximately 45 count) in the first 10 weeks of 2026, higher than the same period in 2025. U.S. monthly advertised retail prices for conventional red flesh seedless watermelons averaged $4.75 each in January 2026 and $5.15 each in February 2026, an increase of 16 percent and 6 percent from the same months in 2025, respectively.

Cantaloupe

U.S. cantaloupes are typically available from May to November, with domestic shipments the highest between June and August (figure 17). Grower prices vary seasonally, with prices the highest at the beginning and end of the domestic season when supplies are lowest.

Figure 17
Cantaloupe movement and grower prices, May to November 2025



Cwt = hundredweight, a measure equal to 100 pounds.
Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service and USDA, Agricultural Marketing Service, *Market News*.

USDA, NASS reports annual cantaloupe production data for four States: California, Arizona, Georgia, and Texas. California has accounted for about 63 percent of U.S. cantaloupe production in recent years (2023–25), with the State's production concentrated in Fresno and Merced Counties (San Joaquin Valley) and Imperial and Riverside Counties (southern California).

In 2025, cantaloupe utilized production was 1.06 billion pounds, nearly unchanged from the 2024 crop. California cantaloupe production was estimated to be 707.5 million pounds, a 12-percent increase from 629.2 million pounds in 2024. Harvested acreage for cantaloupe in California was estimated to be 28,300 acres, an increase of 4,100 acres year over year and the highest acreage since 2018. The 2025 cantaloupe crop was valued at $240 million, a 20-percent decrease from 2024. Cantaloupe grower prices dropped from $28.40 per cwt in 2024 to $22.60 per cwt in 2025. Cantaloupe per capita availability remained steady in 2025 at approximately 5 pounds per person.

U.S. fresh cantaloupe export volume increased 16 percent year over year to 158.1 million pounds in 2025—the highest export volume since 2017. Volume increased to Canada and Mexico, the top two destinations, which collectively accounted for 95 percent of U.S. fresh cantaloupe export volume. The value of fresh cantaloupe exports increased 13 percent to $45.5 million, the highest since 2011 in nominal terms.

Fresh cantaloupe imports totaled 811.8 million pounds in 2025, essentially unchanged from 2024. Guatemala and Honduras accounted for about 86 percent of volume. In 2025, imports from Honduras decreased 32 percent but were offset by a 10-percent increase from Guatemala, the top supplier. Tropical Storm Sara caused flooding in parts of Central America in November 2024, reducing yields and delaying shipments for cantaloupe from Honduras in the first few months of 2025. The value of fresh cantaloupe imports declined for the second consecutive year to $228.2 million, a 7-percent decrease from 2024.

The domestic cantaloupe season will not begin until late spring when the Southeast, Arizona, and California's Imperial Valley begin harvesting. From January to mid-March 2026, cantaloupe shipments (all imported) were higher than the same period the previous year. Increased shipments from Honduras and Costa Rica more than offset lower shipments from Guatemala. Cantaloupe retail prices were lower in early 2026. In February 2026, monthly advertised retail prices for conventional cantaloupes averaged $3.19 each, down 6 percent from the same month last year.

Honeydew

USDA, NASS reports annual honeydew production estimates for California. Major honeydew areas in California include Riverside and Imperial Counties in the southern part of the State and Fresno and Kern Counties in the San Joaquin Valley. U.S. honeydew melons are available from May to November, with shipments typically highest between July and September.

In 2025, honeydew utilized production was 283.2 million pounds, a 10-percent increase from the 2024 crop on increased acreage and higher yields. Honeydew harvested acreage in California rose for the third consecutive year to 9,600 acres, the highest level since 2019. The 2025 honeydew crop was valued at $72.5 million, an 11-percent decrease from the 2024 season. Average honeydew grower prices decreased from $31.60 per cwt in 2024 to $25.60 per cwt in 2025. Higher domestic production and steady imports increased honeydew per capita availability slightly to 1.8 pounds per person in 2025, almost unchanged from 2024.

U.S. fresh honeydew imports totaled 416.1 million pounds in 2025, almost unchanged from 2024. Three countries supply almost all fresh honeydew imported to the United States: Guatemala, Mexico, and Honduras. Lower import volumes from Guatemala and Honduras were offset by higher volume from Mexico. In 2025, the import value of fresh honeydew melons decreased 2 percent to $131.5 million.

Honeydew harvest in California typically begins in May with domestic shipments typically highest in July and August. From January to mid-March 2026, honeydew shipments (all imported) were lower than the same period the previous year, with lower shipments from top supplier, Guatemala. Honeydew retail prices were 5 percent higher year over year in both January and February 2026. U.S. advertised retail prices for conventional honeydew melons averaged $4.37 each in January 2026 and $4.36 each in February 2026.

Tree Nuts Outlook

The United States is the world leader in almond and pistachio production, with almost all U.S. output grown in California. Spring weather affects bloom conditions, pollination success, and yield. California almond pollination typically occurs from early to mid-February through mid-March and pistachio pollination follows in early to mid-April. Unlike most almond varieties that require insects for successful pollination, pistachio pollination relies exclusively on wind.

California almond crop progress: In February 2026, California almond orchards experienced periods of cool, rainy weather during bloom. Although conditions varied across the State, the weather reduced bee pollination activity and limited growers' in-field activities, including pest management and nutrient applications. Almond bloom concluded in early March, after which beekeepers began removing hives from orchards. Regional climatic differences between the Sacramento Valley and San Joaquin Valley, along with cultivar-specific phenological traits, continue to drive variation in almond nut development and harvest timing across California. Nut development will continue through the summer with almond harvest occurring from mid-August through October. The 2026 USDA, NASS California almond subjective forecast is scheduled for release on May 12, 2026.

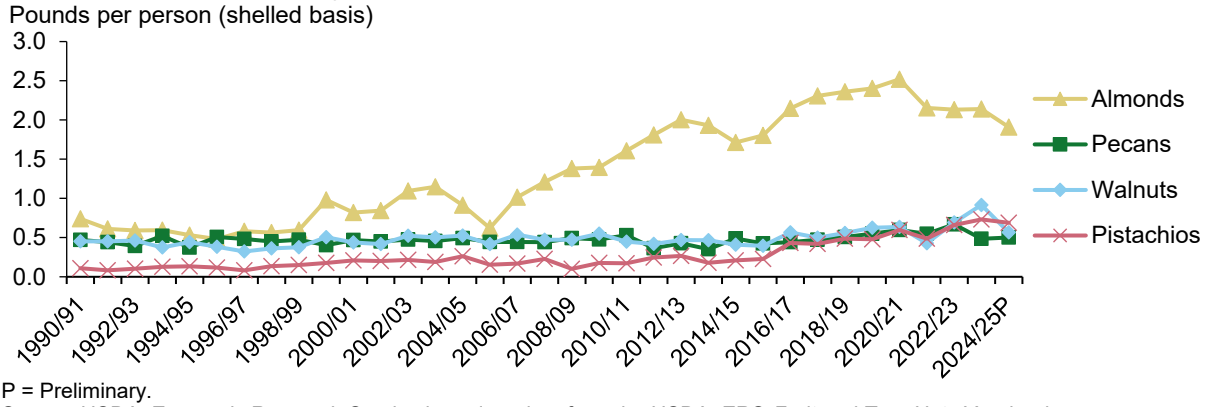
2025 Pistachio Production Forecast Is the Largest on Record

Recap on 2024/25 pistachio marketing year: In MY 2024/25, a smaller U.S. pistachio crop offset higher beginning stocks, resulting in a 20-percent year-over-year decline in total supply. Export volume and ending stocks in MY 2024/25 were lower year over year (down 40 and 24 percent, respectively). Domestic availability (shelled basis) fell only 5 percent, from a record high 248 million pounds in 2023/24 to 235 million pounds in 2024/25. The USDA, NASS MY 2024/25 grower price was almost unchanged from MY 2023/24 (down 0.5 percent). However, stagnant prices and a smaller crop resulted in a 27-percent year-over-year decline in production value from $2.8 billion in MY 2023/24 to $2.05 billion in MY 2024/25.

Per capita pistachio availability in 2024/25: ERS estimates pistachio per capita availability was 0.7 pounds per person (shelled basis) during the last 3 marketing years (figure 18). Pistachio per capita availability, a proxy for consumption, in MY 2024/25 was estimated to be lower than almonds (1.9 pounds) but higher than both walnuts (0.6 pounds) and pecans (0.5 pounds) (figure 18). Walnut and pecan per capita availability has remained relatively stable since the 1990s. However, almond and pistachio per capita availability has trended upward over the last two decades as domestic production increased. Since the early 2000s, per capita

availability (2022/23–2024/25 average) has doubled for almonds and more than tripled for pistachios.

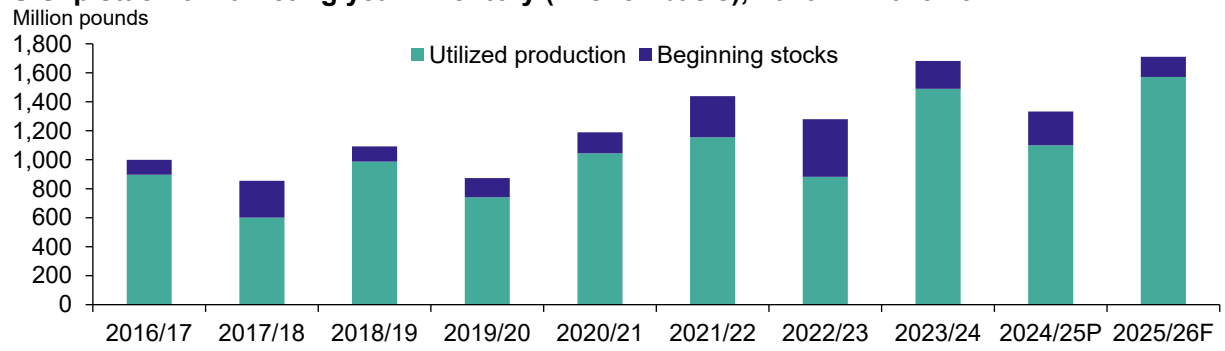
Figure 18
U.S. per capita availability for selected tree nuts (shelled basis), 1990/91–2024/25P



P = Preliminary.
Source: USDA, Economic Research Service based on data from the USDA, ERS *Fruit and Tree Nuts Yearbook, Table-G-44* (February 2026).

Record pistachio crop in 2025: U.S. pistachio production in 2025 was 1.57 billion pounds (in-shell basis), based on crop receipts data from the Administrative Committee for Pistachios (ACP). If realized, the 2025 crop will be the largest on record and mark the 10th consecutive year the United States has led the world in pistachio production. The 2025 crop is 43 percent larger than 2024, reflecting higher yields during an on-year in the alternate bearing production cycle. Beginning pistachio stocks in MY 2025/26 (September–August) were approximately 139 million pounds on an in-shell basis—40 percent lower than MY 2024/25, and the smallest carry-in volume since MY 2019/20 (figure 19). A larger pistachio crop and lower beginning stocks in MY 2025/26 result in a gross inventory of 1.71 billion pounds (in-shell basis). Pistachio inventory at the start of MY 2025/26 (beginning stocks plus production) was 28 percent higher than last season (up 471 million pounds, in-shell basis) and 2 percent larger than the previous record high set in MY 2023/24.

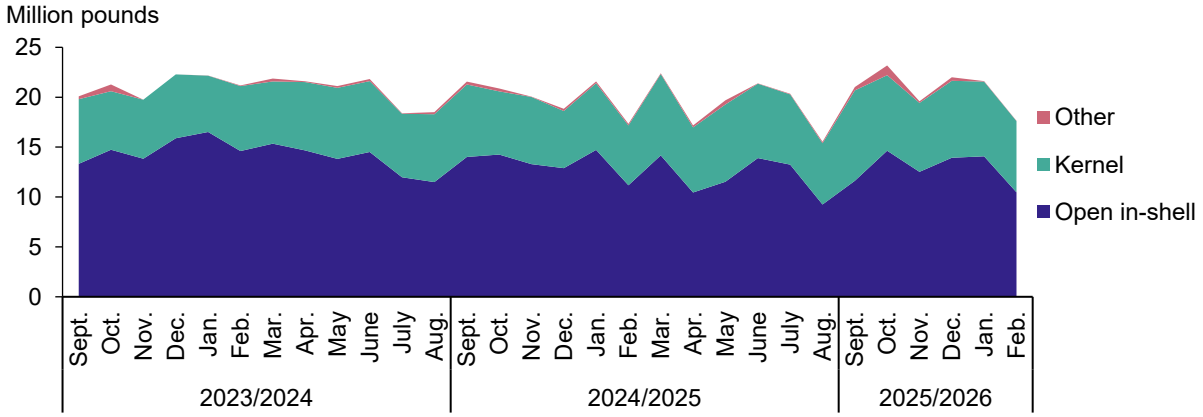
Figure 19
U.S. pistachio marketing year inventory (in-shell basis), 2016/17–2025/26F



P = Preliminary. F = Forecast.
Note: U.S. pistachio marketing year begins in September and ends in August of the following year. Beginning stocks and 2025/26 production forecast are based off data from the Administrative Committee for Pistachios.
Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service and Administrative Committee for Pistachios.

Domestic shipments are up in MY 2025/26: ACP releases monthly reports on domestic and export shipment volume reported by pistachio handlers. The largest shipment category by volume is in-shell pistachios (85 percent), followed by kernels (12 percent), based on average marketing year category shares from 2023/24 through 2024/25. While kernels represent a smaller share of total pistachio shipments, about two-thirds of kernel volume remained on the domestic market. In the ACP February 2026 shipment report, season-to-date domestic shipment volume (September–February) was 125.1 million pounds, 4 percent higher than last season but 1 percent lower than two seasons ago (figure 20). For this period, in-shell represented 62 percent of domestic shipment volume, kernels accounted for 37 percent, and the remaining shipment volume (2 percent) was categorized as either closed shell or shelling stock.

Figure 20
Domestic monthly pistachio shipments by category

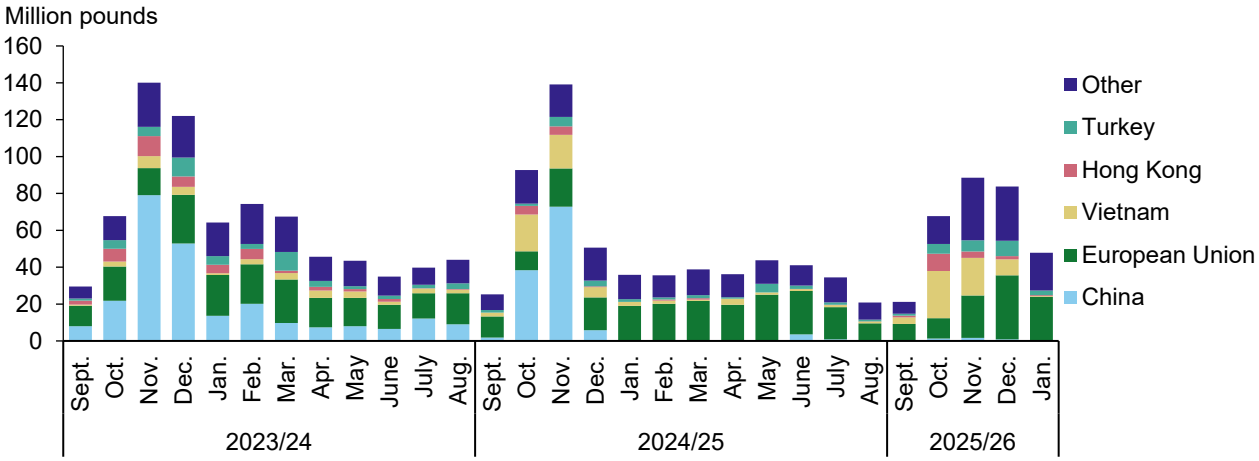


Note: Pistachio marketing begins in September and ends in August of the following year. Domestic volume reported by pistachio handlers to the Administrative Committee for Pistachios. Other category includes closed shell and shelling stock.
Source: USDA, Economic Research Service using data from Administrative Committee for Pistachios, monthly shipment reports (various issues).

2025/26 pistachio exports to the European Union started strong: In the first 5 months of the 2025/26 marketing year (September–January), U.S. export volume of in-shell pistachios totaled 309 million pounds, 10 percent lower than the same period in 2024/25 (figure 21). Season-to-date in-shell pistachio exports to the European Union reached a record 101.6 million pounds in MY 2025/26, 29 percent higher than MY 2024/25. Over the past 5 marketing years, the European Union and China have been the lead markets for U.S. in-shell pistachio exports, jointly accounting for 46–68 percent of export volume each season. Pistachio exports to China, which typically occur earlier in the marketing year, are down 96 percent to date in 2025/26 and represent 1 percent of total U.S. volume. With reduced pistachio exports to China, Vietnam and Turkey ranked second and third in MY 2025/26 export destinations, accounting for 19 and 8 percent, respectively. Total U.S. export value of in-shell pistachios reached $1.14 billion during September–January 2025/26, a 1-percent decline from last season.

Figure 21

U.S. in-shell pistachio export volume lags in early 2025/26



Note: Pistachio marketing begins in September and ends in August of the following year. Export volume for in-shell pistachios only.
Source: USDA, Economic Research Service using data from U.S. Department of Commerce, Bureau of the Census.

Outlook for 2026 pistachio crop: California pistachio pollination occurs in the spring. In a pistachio orchard, wind carries the pollen from male trees to the nut-producing female trees. High winds, rainfall, excessive dust, and inadequate winter chill can disrupt pollination and reduce yields. After pollination, nuts develop through the summer, and growers typically begin harvest in September.

For the 2026 crop, chill accumulation across major production areas remained near average and aligned with last year's levels. Industry sources are currenty expecting the 2026 pistachio crop will be an off-year in the alternate bearing cycle, which would support lower yields. ACP statistics indicate that in 2025, California pistachio bearing acreage totaled 520,314 bearing acres and 98,703 non-bearing acres (immature plantings in their first through fifth year). If bearing acreage increases to 530,000–540,000 acres in 2026 as non-bearing acres enter production, and if off-year yields mirror 2022 and 2024 levels (2,000–2,250 pounds per acre), the 2026 crop would total roughly 1.1–1.2 billion pounds.

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