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Fruit and Tree Nuts Outlook: July 2026

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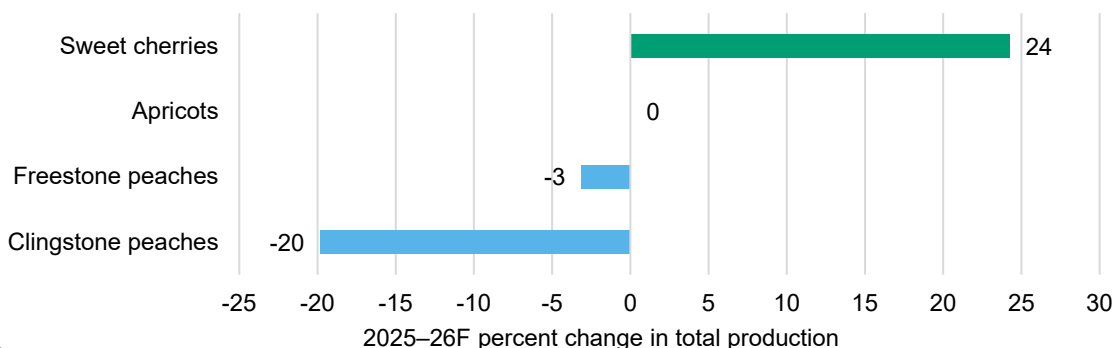
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Weather Spurs Early Harvest for California Fruits in 2026

Warmer-than-average spring temperatures accelerated crop development across California's major fruit-producing regions, prompting earlier-than-usual harvests for cherry, peach, table grape, strawberry, and watermelon. The effect of this year's early start differs depending on the fruit. According to the USDA, National Agricultural Statistics Service (NASS), California stone fruit production forecasts for 2026 are mixed. Sweet cherry growers in the Golden State experienced both an early start and finish to the season, with production projected to be 24 percent higher than last year. Peach harvest is ongoing, with California freestone production expected to edge slightly below 2025 levels (down 3 percent) but remain 12 percent above the previous 3-year average. Clingstone peach production is projected to fall 20 percent amid declining acreage and processing demand. Meanwhile, California's apricot crop is expected to remain steady, unchanged from last season.

California stone fruit production outlook is mixed in 2026



F = Forecast.

Source: USDA, Economic Research Service based on data from the USDA, National Agricultural Statistics Service, *Crop Production* (May, June, and July 2026 issues).

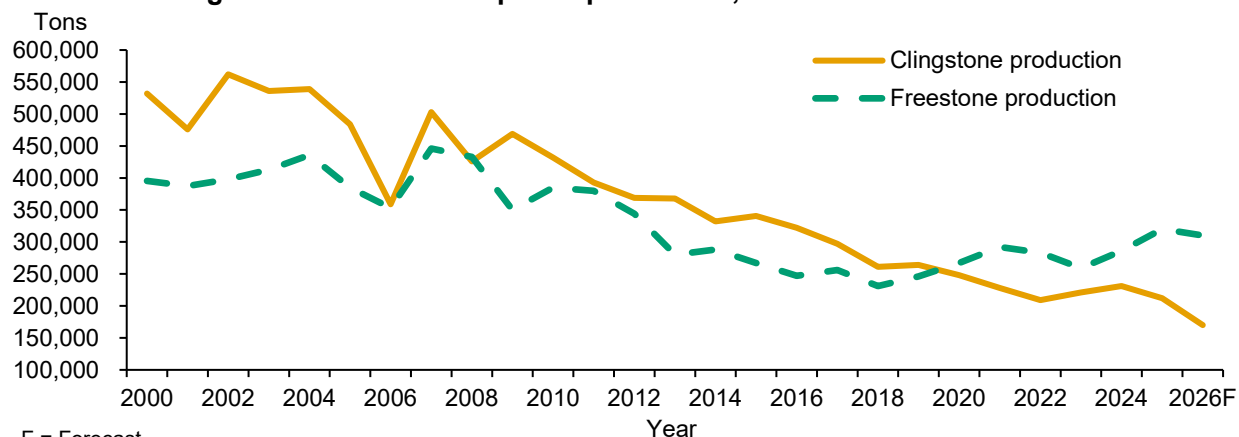
Noncitrus Fruit Outlook

California Peach Production To Decline in 2026

California is the top U.S. peach-producing State, accounting for 62 percent of U.S. fresh-market production and 99 percent of processing peach production in 2025. USDA's National Agricultural Statistics Service (NASS) May forecast for 2026 California peach production is 480,000 tons, a 10-percent decrease from a year ago. The projected decline is driven by a 20-percent reduction in the clingstone crop. The 2026 California clingstone forecast is 170,000 tons and marketed primarily to processors (figure 1). The remaining forecast consists of 310,000 tons of freestone varieties, representing 65 percent of California's peach production estimate. If realized, this season's estimated freestone production would fall 3 percent short of last year's bumper crop. The USDA, NASS *Crop Production* report (released in August 2026) will include peach production forecasts for additional States (Colorado, Georgia, Michigan, New Jersey, Pennsylvania, and South Carolina) and a revised California forecast.

Figure 1

California clingstone and freestone peach production, 2000–2026F



F = Forecast.

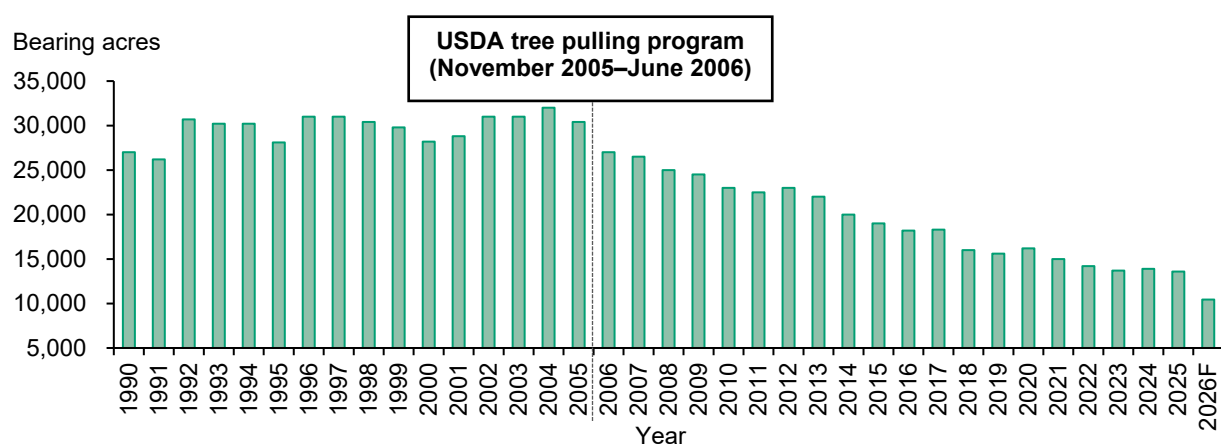
Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, *Quick Stats*.

The terms “clingstone” and “freestone” refer to whether the peach pit clings to the flesh when ripe (clingstone) or separates easily (freestone). California clingstones retain a texture and firm flesh that are well-suited for the mechanized pitting, slicing, and high temperatures used in industrial canning. These qualities, however, make clingstone varieties less desirable in the fresh market. As a result, an estimated 95 percent of California's annual clingstone production is destined for canning. By contrast, freestone peaches have a soft “melting” flesh when ripe, a trait preferred by fresh-market consumers. About three-fourths of California's freestones go to the fresh market each season, and the remaining volume is primarily processed by freezing or drying.

Declining acreage from the mid-2000s: Throughout the 1990s, California clingstone bearing acreage averaged about 30,000 acres and annual production represented about 40 percent of total U.S. peach production. In 2000, the number of major California peach canners fell from four to three after a major California fruit and vegetable processor declared bankruptcy, abruptly reducing demand for clingstone peaches and lowering domestic processing capacity. However, clingstone-bearing acreage continued to rise as new plantings began bearing fruit more rapidly than older bearing acreage was removed. By 2004, bearing acreage reached 32,000 acres, as producers experienced a fifth consecutive year of depressed prices. In response to grower requests, USDA authorized a voluntary tree removal program (Clingstone Peach Diversion Program), funded under Section 32 from November 2005 through June 2006. Between the 2005 and 2006 seasons, bearing acreage declined to 27,000, and continued to decline following the program in 15 of the subsequent 19 years (figure 2). By 2025, acreage had fallen to 13,600 acres—less than half the acreage present at the start of the century.

Figure 2

California clingstone peach bearing acres, 1990–2026F



F = Forecast.

Note. The USDA tree pulling program refers to the Clingstone Peach Diversion Program codified in the Code of Federal Regulations (C.F.R.): 7 C.F.R. part 82, effective November 4, 2005.

Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, *Quick Stats* and the California League of Food Producers *2026 Block-by-Block Estimate* (released June 30, 2026).

Realignment in California’s clingstone peach industry: In July 2025, Del Monte Foods, one of two major peach canning processors in California, filed for bankruptcy. During the bankruptcy proceedings, the company cancelled multi-year contracts with clingstone growers and sold its assets (which included canned fruit inventories, several processing plants in North America, and brand rights). However, Del Monte’s largest fruit canning plant in Modesto, California was not purchased and was subsequently closed in April 2026. Industry reports indicated that this plant processed roughly one-third of California’s clingstone peach volume, or about 70,000 tons. Although the plant continued to accept and process clingstone peaches throughout the 2025 season, its closure will reduce demand for California clingstones in 2026.

The expected reduction in California canned peach processing demand in 2026 reflects several short and long-term factors, some of which are not unique to clingstone producers. These factors include high establishment costs for tree fruit crops, limited number of specialized processors, and tradeoffs with canning cultivars. Canned peach demand has also trended lower since the early 2000s, partly reflecting waning consumer demand, a trend also observed in U.S. canned pear and canned pineapple availability. Canned peach per capita availability (a proxy for consumption) fell from an average of 4.5 pounds per person (2000/01–2002/03) to 2.2 pounds per person (2023/24–2025/26) on a product-weight basis.

This season, the California League of Food Processors' (CLFP) *2026 Block-by-Block Estimate* report estimates that clingstone bearing acreage was about 10,100 acres, 3,150-acres less than in 2025. If realized, this decrease would be the largest year-over-year decline since the 2005–06 period.¹ The closure of the Del Monte canning facility before the 2026 harvest is a contributing factor to the expected higher-than-average bearing acreage removal.

2026 California clingstone harvest is underway: California clingstone harvest typically lasts from late June through early September, reaching the halfway point around early August. By July 11, 2026, California clingstone peach deliveries totaled about 42,000 tons, more than 3 times higher than the same period last year, based on weekly reports issued by the CLFP. This number represents 26 percent of the season's total expected delivery volume (163,788 tons) to peach processors according to the CLFP *Block-by-Block* 2026 estimate. An increase in season-to-date deliveries reflects the broader trend of earlier maturing fruits and nuts across California orchards this year, not a larger crop. ERS expects cumulative weekly totals to fall behind last year's pace, as harvest progresses and delivered weekly tonnage drops year over year in August.

In terms of the price outlook, the 2026 ratified base-price agreement between the California Canning Peach Association (a grower-led bargaining association) and the largest peach processor is unchanged from last year at \$610 per ton. If the USDA season-average price received for California clingstones also remains flat and the crop estimate is realized, 2026 production value would be about \$27 million less than in 2025 (down 20 percent).

Fresh-market peach outlook varies by region: South Carolina and Georgia are the second and third largest peach-producing States after California, respectively. Their peach harvest began in May and will mostly conclude by the end of July. Reports from the Clemson

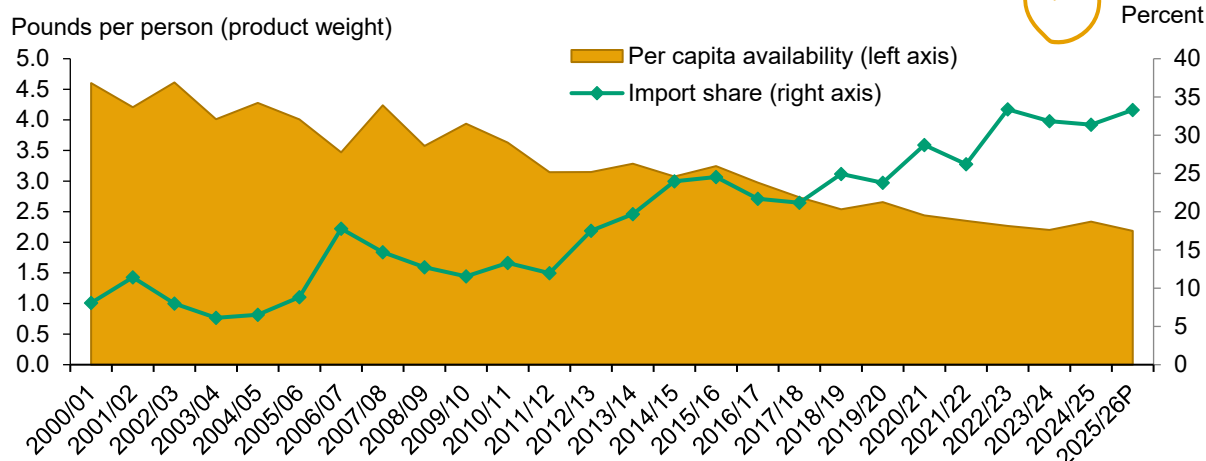
¹ USDA will release its final acreage estimates for the 2026 season in the *2026 Noncitrus Fruits and Tree Nuts Annual* report in May 2027.

Agricultural Extension and USDA, NASS indicate that the southeastern peach crop is in average or above-average condition. In Pennsylvania and New Jersey, which ranked fourth and fifth last year, spring freezes in April reportedly reduced peach yield. High summer temperatures may further erode fruit quality and sizing. During the first week of July, temperatures soared into the triple-digits across the mid-Atlantic region, resulting in some of the hottest Fourth of July weather on record in several major cities. This year's fresh-market peach season will be discussed in more depth in the *Fruit and Tree Nuts Outlook: September 2026* report.

Preliminary 2025/26 canned peach availability is lower: For marketing year 2025/26 (June–May), ERS estimates that the U.S. domestic availability of canned peaches (product-weight) was 749 million pounds, down 2 percent from the 3-year average (figure 3). Per capita availability for canned peaches in 2025/26 was 2.2 pounds per person, which is similar to the 3-year average of 2.3 pounds per person. Compared to the early 2000s, availability is 42 percent lower, production in 2025/26 is about 60 percent lower, and import volume is almost double. In the last 25 seasons, domestic production has steadily trended downward but changes to imports have varied. U.S. canned peach imports trended upward from the early 2000s through the mid-2010s but largely plateaued over the previous decade, with marketing year volumes ranging between 189 and 254 million pounds. However, because domestic peach production continued to decline during this period, imports now represent a larger share of a smaller market, rising from 22 percent in 2016/17 to roughly 32 percent in the previous 4 marketing years.

Figure 3

U.S. canned peach per capita availability and import share



P = Preliminary.

Note: Season begins in June of the first year shown. Imports include canned peaches and peach puree but exclude peach jam. Per capita availability is reported on a product-weight basis.

Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service and U.S. Department of Commerce, Bureau of the Census.

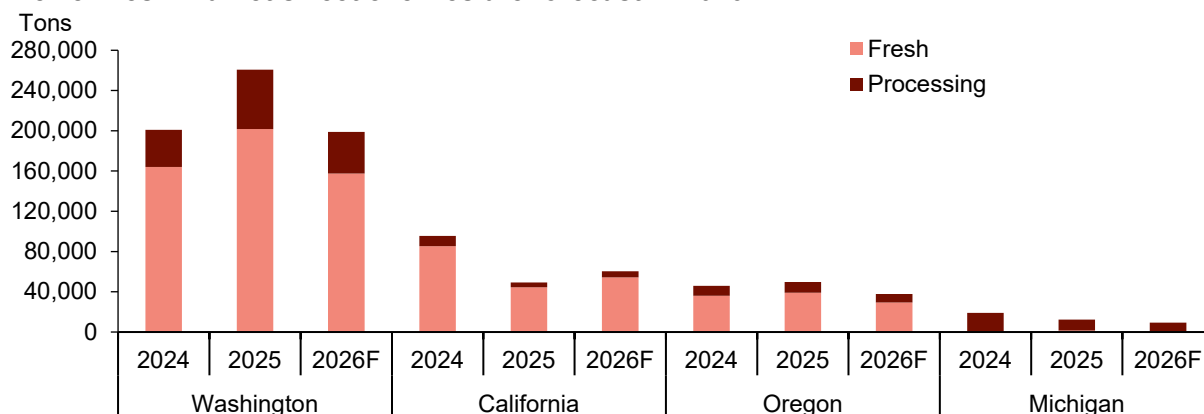
Sweet Cherry Forecast Is Down in 2026

The 2026 USDA, NASS June *Crop Production* forecast for sweet cherries in the four NASS-surveyed States is 310,500 tons (621 million pounds), down 17 percent from a year ago and the smallest since 2022. Production is projected to decline year over year in Washington (down 23 percent), Oregon (down 24 percent), and Michigan (down 24 percent). California sweet cherry production in 2026 is forecast at 63,000 tons, 24 percent higher than last year's short crop but small relative to the 2023–24 average of 103,150 tons. Top State Washington is expected to account for two-thirds of 2026 U.S. sweet cherry production. At 200,000 tons, the Washington State sweet cherry forecast is 61,000 tons less than last season's bumper crop, which was the largest crop in 8 years.

Most sweet cherries go to the fresh market: Last year, fresh-market sweet cherry production was 286,800 tons, accounting for about 77 percent of volume and 91 percent of value. Most sweet cherries in California, Oregon, and Washington historically go to the higher-value fresh market but most Michigan cherries are processed. If all States follow previous utilization patterns, the 2026 U.S. fresh-market sweet cherry crop will total about 242,000 tons, 16 percent lower than last season (figure 4).

Figure 4

Fewer fresh-market sweet cherries are forecast in 2026



F = Forecast.

Note: 2026 fresh and processed utilized production for Washington, California, and Oregon assumed a 3-year average utilization. Annual sweet cherry surveys were discontinued in Michigan between 2018 and 2023. Due to gaps in survey data, the 3-year average utilization for Michigan is based off 2017, 2024, and 2025.

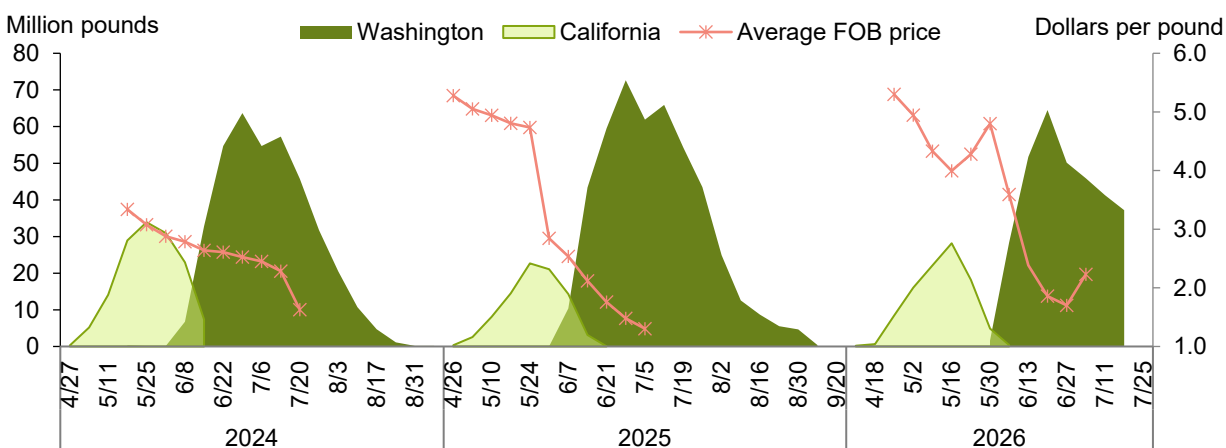
Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, *Noncitrus Fruit and Nuts Summary*, various issues and *Crop Production* (June 2026).

Early start and end to California's cherry season: In 2026, California's cherry harvest started and ended about 2 weeks earlier than normal due to a warmer-than-average spring. Growers also experienced unseasonably heavy rain events in April and May that reportedly led to fruit cracking and subsequent crop loss in some orchards. The early end to California's season resulted in limited domestic supplies at the end of May, causing Memorial Day prices to rise and deviating from the usual pattern of declining weekly prices observed from early May through

mid-July (figure 5). There was minimal overlap between California and Washington shipments this season, according to USDA, AMS *Market News* movement data. Shipment volume from Washington State peaked in mid-June—approximately 1 week earlier than the previous season. During this period, average FOB prices remained below those observed in the 2 years prior. As weekly shipment volumes tapered off toward the end of June, prices began to increase leading into the Fourth of July. ERS anticipates that Washington’s cherry season will also conclude earlier than last year, mirroring the trend observed in California.

Figure 5

Minimal overlap between California and Washington sweet cherry shipments this season



FOB = Free on board.

Note: Average weekly FOB prices are based on California and Washington red sweet cherry varieties in 16 or 18 pound bags, medium fruit size (9 1/2, 10, or 10 1/2 row size). Shipment volume represents weekly domestic movement by State of origin.

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

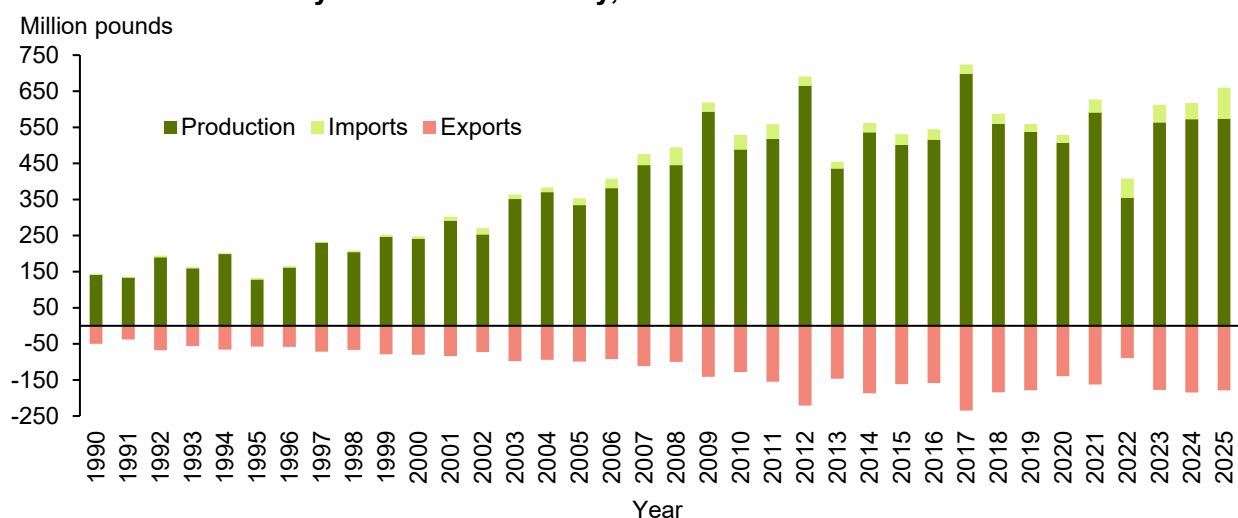
Early season exports are up in 2026: About 30 percent of U.S. fresh-market sweet cherry production was exported annually over the last decade. More than half of exports occur in June and July when harvest for this highly perishable fruit is at its peak. For 2026, early season fresh sweet cherry exports in April–May were up 43 percent by volume and 3 percent by value, relative to the same period in 2025, reflecting an increase in California’s early season cherry crop. For Washington State, export shipments of fresh sweet cherries in 2026 (reported by the Washington State Department of Agriculture) indicate season-to-date volumes through July 5 to top destinations Canada, South Korea, Taiwan, and Japan were lower this year but higher than two seasons ago.

Preliminary 2025 fresh sweet cherry availability: For 2025, ERS estimates that U.S. domestic availability (production minus exports plus imports) of fresh sweet cherries was 481 million pounds, up 11 percent from 2024 (figure 6). Preliminary fresh sweet cherry per capita availability in 2025 was 1.4 pounds per person, rising from an average of 1.3 pounds in 2023–24. After increasing from the mid-1990s through the mid-2000s, the per capita availability of

fresh sweet cherries (a proxy for consumption) has exceeded 1 pound per person in 18 of the last 20 years. The primary driver of year-over-year changes in availability is domestic production, which accounted for an average of 91 percent over the last 10 years. In 2025, domestic cherry production represented 82 percent of availability, as imports reached a record high of 86 million pounds. However, 80 percent of that import volume was from counter-seasonal producers in the Southern Hemisphere (primarily Chile and Argentina). Cherry imports from Canada accounted for the remaining 20 percent of U.S. imports, with most volume concentrated in August when U.S. harvest season winds down. The United States continued to be a net exporter of fresh sweet cherries in 2025, with volumes totaling 179.3 million pounds.

Figure 6

U.S. fresh sweet cherry domestic availability, 1990–2025

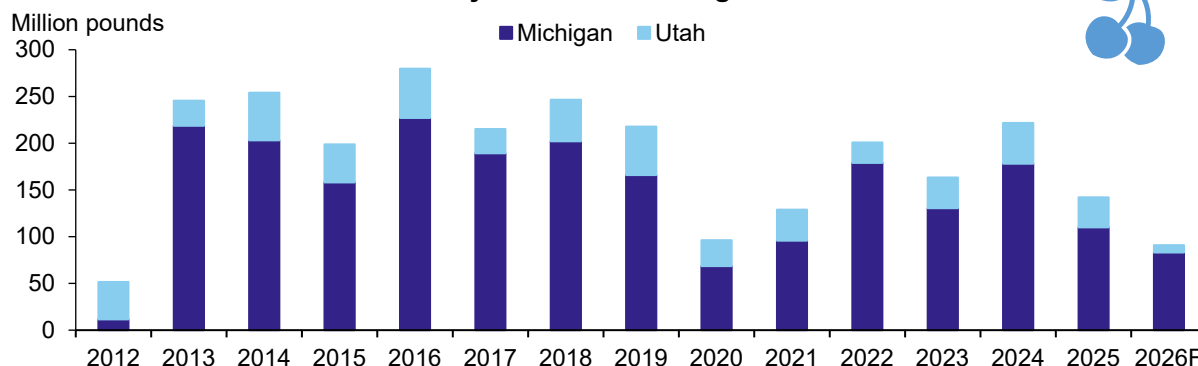


Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service and U.S. Department of Commerce, Bureau of the Census.

Sour Outlook for the 2026 Tart Cherry Crop

Tart cherries (*Prunus cerasus*), also known as sour cherries, are a distinct species of stone fruit that are closely related to sweet cherries (*Prunus avium*). Tart cherry harvest is highly seasonal and almost 99 percent of production is destined for processing (e.g., frozen, canned pie filling, juice, or dried). The USDA, NASS June *Crop Production* forecast for the 2026 tart cherry crop is 91 million pounds (45,500 tons), down 36 percent from the previous year. If realized, U.S. tart cherry production this season would be the lowest since 2012. Spring freeze events contributed to the lowered production forecast this year in both Michigan (down 24 percent) and Utah (down 75 percent) (figure 7).

Figure 7

Freeze events lower 2026 tart cherry forecast in Michigan and Utah

F = Forecast.

Source: USDA, National Agricultural Statistics Service, *Noncitrus Fruit and Nuts Summary*, various issues and *Crop Production* (June 2026 issue).

Michigan, the largest tart cherry producing State, is forecast at 83.1 million pounds, down 26.9 million pounds from last season and the smallest crop in 6 years. While cool spring weather delayed crop development, a late-April freeze event damaged vulnerable buds in some orchards, resulting in lower yields. Harvest of this year's smaller crop began in late June during a summer heatwave and was largely finished across the State by mid-July.

Utah's tart cherry forecast is down sharply from 32.2 million pounds in 2025 to 7.9 million pounds in 2026. Severe late-spring freeze events caused widespread damage in Utah's cherry orchards this year. If realized, Utah's tart cherry crop would be the smallest since 1972 (1.3 million pounds), another year noted for damaging spring freezes. The Cherry Industry Administrative Board (CIAB)² estimate for Utah's 2026 crop is 1.25 million pounds, lower than the USDA forecast and closer to the final volume in 1972.

USDA, NASS no longer reports tart cherry production estimates for **Washington, New York,** and **Wisconsin**—which typically represented about 19 percent of annual U.S. production (39 million pounds) in 2019–23. The initial CIAB 2026 production estimate for these States is 33.8 million pounds, down 31 percent from their 2025 estimate. Like Michigan and Utah, the current forecast assumes double-digit year-over-year percentage declines in all three States.

Smaller crop and lower carry-in for 2026/27: CIAB reports raw-product equivalent (RPE) carry-in inventory volume for each marketing year (July–June). For MY 2026/27, carry-in volume was 60.6 million pounds, 26.6 million pounds lower than MY 2025/26. If the smaller CIAB 2026/27 crop estimate and carry-in are realized, total available supply (production plus carry-in volume) in MY 2026/27 would be about 40 percent lower than last season. The USDA, NASS

² The CIAB, composed of producer and handler members (along with one public member) administers the tart cherry Federal marketing order under USDA oversight authority. The marketing order authorizes volume control authority in the form of a reserve pool in times of heavy tart cherry supplies.

Cold Storage report also indicates reduced inventories heading into MY 2026/27, relative to last year. At the end of May 2026, USDA, NASS reported frozen tart cherry volume in cold storage was lower in all 3 categories: ripe tart pitted (down 37 percent), juice stock (down 35 percent), and juice concentrate (down 14 percent). This year's May ripe tart pitted volume in cold storage is the lowest since 2013, which followed the short 2012 crop. Smaller than average carry-in, coupled with a small crop in 2026, is expected to put upward pressure on grower prices and result in tight raw supplies for domestic processors.

California Apricot Production Forecast Is Unchanged in 2026

Apricots (*Prunus armeniaca*) are a species of stone fruit in the same genus (*Prunus*) as almonds, peaches, plums, and cherries. Apricot harvest in the United States typically starts in mid-May and ends by mid-August. This year's harvest is expected to total less than half the annual average in 2000–2002, reflecting a long-term decline in bearing acreage. For 2026, the USDA, NASS July *Crop Production* forecast for apricots is 36,500 tons, 5 percent lower than in 2025. The California forecast is unchanged from 2025 at 34,000 tons, accounting for 93 percent of the U.S. crop. Apricot production in Washington is forecast to decline 41 percent, from 4,250 tons in 2025 to 2,500 tons in 2026.

California Grape Acreage Is Lower

USDA, NASS in conjunction with the California Department of Food and Agriculture (CDFA) released the *California Grape Acreage Report* covering the 2025 crop in April 2026. This annual report contains information on plantings and removals of grapes grown in California. California is the leading grape-producing State in the United States, accounting for about 90 percent of the U.S. grape crop.

Wine grape acreage in California was estimated to be 540,000 acres in 2025, a decrease of 7 percent (40,000 acres) year over year. The 2025 acreage estimate marked the lowest wine grape acreage in California since 2010 and a decrease of almost 100,000 acres from the 2018 peak of 637,000 acres. Table grape acreage in California was estimated to be 118,000 acres in 2025, a decrease of 2 percent (2,000 acres) year over year. This estimate marked the fifth consecutive year of declining table grape acreage in California. Though no longer covered in the *California Grape Acreage Report*, acreage dedicated to raisin grapes in California has decreased by more than 100,000 acres in the past two decades. Raisin grape acreage has declined by 48 percent from 240,000 acres in 2005 to 126,000 acres in 2025, as indicated in the USDA, NASS *Noncitrus Fruits and Nuts 2025 Summary* published May 2026.

Notably, the *California Grape Acreage Report* indicates that additional vine removals took place in California following harvest in calendar year 2025 and that these removals were counted as bearing acreage in 2025. Consequently, ERS expects bearing acres to fall for both table and wine type grapes in California in 2026.

California grape crush volume is the lowest in decades: USDA, NASS in conjunction with CDFA released the *California Grape Crush Report* covering the 2025 California grape crush in April 2026. This annual report provides information on all grape tonnage crushed during the 2025 season. Revisions to the *2025 California Grape Crush Report* will be released in August 2026 and discussed in the USDA, ERS *Fruit and Tree Nuts Outlook: September 2026* report.

The 2025 crush volume represented the net weight fresh tonnage of all grapes from the 2025 grape crop purchased for wine, concentrate, juice, vinegar, and beverage brandy by California processors. Most of the grapes crushed are wine-type grapes, or those varieties that are well-suited for making wine rather than table-type grapes that are consumed fresh or raisin-type grapes that are suited for drying into raisins. Wine grapes accounted for 95 percent of grapes crushed in 2025.

The *2025 California Grape Crush Report* indicated that the 2025 grape crush totaled 2.76 million tons, down 6 percent year over year from 2.94 million tons crushed in 2024. The 2025 estimate represented the lowest California grape crush volume since 1994 and was 41 percent below the record high of 4.7 million tons crushed in 2013. The volume of wine grapes crushed was estimated to be 2.6 million tons in 2025, an 8-percent decrease year over year. This estimate represented the lowest California wine grape crush volume since 1999 and was 39 percent below the record high of 4.3 million tons crushed in 2018, when wine grape bearing acreage peaked in California at 590,000 acres.

The volume of both red wine grapes and white wine grapes crushed in California decreased for the second year in a row in 2025. White wine grape crush volume decreased 5 percent from 1.4 million tons in 2024 to 1.32 million tons in 2025—the lowest since 2006. Red wine grape crush volume decreased 11 percent from 1.47 million tons in 2024 to 1.3 million tons in 2025—the lowest since 1996. For the first time in almost three decades, more white wine grapes were crushed in California than red wine grapes. From 1997 to 2024, red wine grapes made up more than half of wine grapes crushed in California.

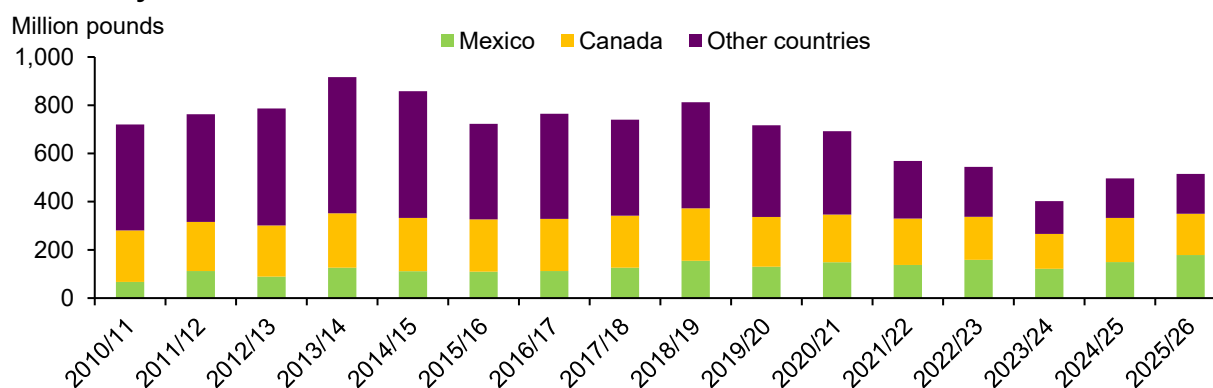
2025/26 fresh grape season: The 2025/26 fresh grape marketing year began in May 2025 and ended in April 2026. Fresh grape utilized production was estimated to be 1.76 billion pounds in

2025, an increase of 1 percent year over year. Fresh grape per capita availability decreased by over half of a pound to 9 pounds per person in 2025/26.

In 2025/26, U.S. fresh grape exports increased to 515 million pounds, an increase of 4 percent year over year. This increase marks the second consecutive year of higher exports and an increase of 28 percent from 2023 when remnants from Hurricane Hilary damaged California's grape crop. Almost all U.S. fresh grape exports are shipped between July and December and most are destined for either Mexico or Canada. These two countries accounted for 67 percent of fresh grape export volume on average in recent years (2023/24–2025/26), up from about 41 percent on average a decade ago (2013/14–2015/16). Fresh grape export volume to North America has remained steady, as exports to other countries have decreased over time (figure 8). In 2025/26, Mexico surpassed Canada as the top destination for U.S. fresh grape exports. Grape exports to Mexico increased 20 percent year over year to a record high of 179 million pounds. Grape exports to Canada decreased 8 percent year over year to 171 million pounds, 24 percent below the 2013/14 peak of 226 million pounds.

Figure 8

Most U.S. fresh grape exports were destined for either Canada or Mexico in recent years



Note: U.S. grape marketing year begins in May and ends in April of the following year.

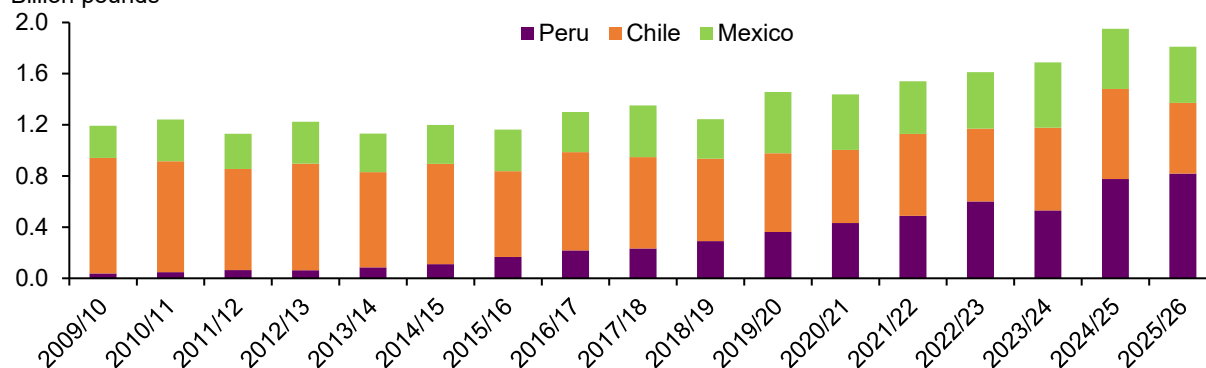
Source: USDA, Economic Research Service based on data from U.S. Department of Commerce, Bureau of the Census.

Imports accounted for 59 percent of fresh grape domestic availability in 2025/26, down from 62 percent in 2024/25. In 2025/26, fresh grape imports to the United States decreased to 1.82 billion pounds, down 9 percent year over year from the 2024/25 record high of 2 billion pounds (figure 9). This marks the second highest fresh grape import volume on record. Almost all fresh grape imports enter the United States between November and July during the domestic off season, and almost all fresh grapes imported to the United States are from Peru, Chile, and Mexico. These three countries accounted for 99 percent of fresh grape imports, with most shipments from Peru available from November to March; grape shipments from Chile are available from January to April; and shipments from Mexico are available from April to July.

Figure 9

Fresh grape imports from Peru reach a record high in 2025/26

Billion pounds



Note: U.S. grape marketing year begins in May and ends in April of the following year.

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

Fresh grape imports from Peru rose 6 percent to a record high of 818 million pounds in 2025/26 and accounted for 45 percent of fresh grape imports (figure 9). Peru's table grape industry has grown rapidly in recent decades. Higher imports in part reflect record fresh grape production in Peru. USDA, FAS estimates Peru's 2025/26 fresh grape production to be 1.92 billion pounds, 10 percent higher year over year and up 60 percent from 1.2 billion pounds a decade ago (2015/16). Favorable weather conditions and adequate water availability, coupled with expanded acreage, benefited this season's crop. Grapes have become an increasingly important agricultural commodity for Peru, ranking second behind blueberries.

Fresh grape imports from Chile declined 21 percent to 553 million pounds in 2025/26. This number marks the lowest volume since 1989/90 and 46 percent below the 2005/06 peak of 1.03 billion pounds. Fresh grape production in Chile reached a record high of 2.7 billion pounds in 2010/11 and has declined 44 percent since to 1.5 billion pounds in 2025/26. Chile's table-grape industry has faced challenges including water scarcity, narrow margins due to low prices for traditional grape varieties, and intense competition from Peru's grapes in key export markets like the United States. Table-grape orchards in major production regions have been replaced in recent years with more profitable specialty crops such as cherries, citrus, and walnuts.

Fresh grape imports from Mexico declined for the second year in a row to 439 million pounds in 2025/26, down 14 percent from the 2023/24 peak of 510 million pounds. Lower grape imports partly reflect a decrease in Mexico's fresh grape production in 2025/26. USDA, FAS Global Agricultural Information Network (GAIN) *Mexico: Fresh Deciduous Fruit Annual* reported that planted area was lower, as growers in Sonora (the largest grape growing state in Mexico) replaced older, traditional grape varieties with newer vines. Sonora's arid and semi-arid climate is conducive to grape production; low relative humidity, adequate sunlight, and mild winters

allow for excellent quality, though adequate irrigation is an ongoing concern in the arid desert region.

2026/27 domestic table-grape season outlook: The USDA, NASS 2026 grape production forecast will be released in August 2026. Until then, USDA, AMS movement data indicate that fresh grape shipments from California were higher season to date (May to mid-July). The 2026 season began earlier than usual due to warm temperatures earlier in the year, with shipments from southern California beginning a couple weeks early in May and central California shipments starting ahead of schedule in June. Although cumulative shipments through the third week of July (week 29) were higher compared to the same period last season, weekly shipments from southern California were lower in June and July and are expected to end the season below last year. Domestic table grape shipments from California are expected to continue through December.

Florida Strawberries Were Damaged by Freeze Events

USDA, NASS reports annual strawberry production for 2 major-producing States, California and Florida. Florida is a winter-spring producer, while California produces strawberries throughout the year and volume is highest from May to July. In 2025, U.S. strawberry utilized production was 31.2 million hundredweight (cwt), a 3-percent decrease from the record high of 32.2 million cwt set in 2024. Driven by a 5-percent reduction in yields, California strawberry production declined 4 percent to 27.6 million cwt in 2025 from 2024's record high of 28.9 million cwt. Though lower year over year, the 2025 production estimate was 8 percent above the previous 3-year average of 25.5 million cwt. USDA, AMS shipment data indicate that fresh strawberry shipment volume was similar year over year through the first week of October 2025. Heavy rainfall in the Santa Maria and Oxnard regions resulted in harvest delays and cancellations, which decreased end-of-year shipment volumes (October–December 2025) by 27 percent.

Florida strawberry shipments were lower year over year in 2025/26: Florida typically accounts for about 10 percent of U.S. strawberry production. Strawberry acreage in the Sunshine State has increased from 9,400 acres in 2018 to 17,000 acres in 2025. During the 2025/26 strawberry season (November 2025–April 2026), Florida fresh strawberry shipments were 15 percent lower than in 2024/25. Early season Florida strawberry shipments from late November 2025 through January 2026 were higher than the previous season. Widespread freezing temperatures during Winter Storm Gianna in late January and early February 2026 that damaged Florida's strawberry crop. Fresh strawberry shipments in February were down 37

percent year over year, while March shipments, typically the highest volume of the season, were 64 percent lower than a year ago.

California strawberry spring shipments get an early start in 2026: California accounts for about 90 percent of U.S. strawberry production. California fresh strawberry shipments are typically highest from late spring into summer (May–July). Southern California ships strawberries in the spring and fall, while central California’s peak occurs in the summer months. Unseasonably warm temperatures in California in early 2026 sped up the development and shipment of this year’s strawberry crop. March shipment volumes were higher year over year as the spring season began and remained elevated through April. May volumes fell below previous year levels (down 14 percent), but June volumes were similar to last season’s. Year to date through mid-July (week 29), USDA, AMS movement data indicate that domestic fresh strawberry shipments from California were about 5 percent higher year over year.

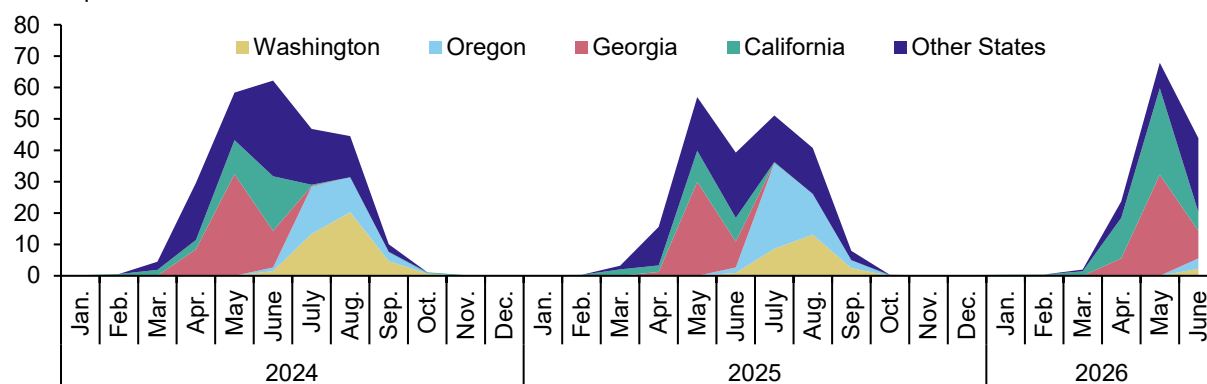
Domestic Blueberry Season Is Underway

More than 90 percent of U.S. fresh blueberry shipments occur between April and August (figure 10). The U.S. blueberry harvest season begins in the southeast in spring and moves northward as the season progresses, with the major producing region of the Pacific Northwest beginning in summer. The top four cultivated blueberry States (Washington, Oregon, Georgia, and California) accounted for almost three-quarters of U.S. production in 2025.

Figure 10

U.S. blueberries are available in the spring and summer months

Million pounds



Note: Movement data include only domestic shipments.

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

Year to date through mid-July (week 29), USDA, AMS movement data indicate that U.S. blueberry shipments were higher compared to the same period in 2025. Fresh blueberries from Florida begin the domestic season and are typically available from March to June. Florida blueberry shipments were 56 percent lower year over year in 2026, in part due to widespread freezing temperatures during Winter Storm Gianna in late January and early February 2026 that

damaged the blueberry crop. Fresh blueberry shipments from Georgia began mid-April and ended mid-July. Georgia blueberry shipments were about 19 percent higher year over year. Dry conditions during the blueberry growing season alleviated some of the disease and pest pressures typically experienced in Georgia's warm, humid climate.

Pacific Northwest fresh blueberry shipments began mid-June (week 25). Early season blueberry shipments from Washington State were higher season to date through early July (week 29). Weekly crop reports indicate that the Washington State season is off to an early but good start. Pest pressure has not been as much of an issue as in previous seasons. Though some reports indicate small fruit sizing, fruit quality, including firmness, has been reported as good to excellent. Early season blueberry shipments from Oregon were lower season to date through mid-July (week 29). Unseasonably warm conditions have expedited fruit ripening in the Willamette Valley and led to pest pressure from spotted wing drosophila (SWD). SWD is an invasive fruit fly that targets soft-skinned fruits, such as berries and cherries.

Raspberry Production Climbed Higher in 2025

Most commercial raspberry production in the United States is located on the West Coast. USDA, NASS reports annual raspberry production for three major-producing States: California, Washington, and Oregon. Most raspberries grown in California are destined for the fresh market, and most raspberries grown in the Pacific Northwest are grown for processing. The raspberry season in the Pacific Northwest begins in June and runs into autumn. California raspberries are shipped year-round, with volume highest from June to September.

2026 U.S. raspberry season outlook: Year-to-date shipments of fresh raspberries from California through mid-July (week 29) were down from last year due to lower shipments from southern California. Weekly spring raspberry shipments from California were higher year over year from late March (week 13) through the end of May (week 22), due to unseasonably warm temperatures which sped crop development. Summer shipments were lower in June and into mid-July (week 29) compared to last season. Cooler than normal temperatures in late June and early July slowed raspberry harvest.

The Pacific Northwest raspberry season began in early July (week 27). Weekly crop reports indicate that raspberries in Washington and Oregon have experienced some sunburn or sunscald early this season due to heat. Raspberries are a delicate and highly perishable fruit. Raspberries are prone to heat damage during fruit development and ripening, and fresh raspberries have a short shelf life of between 6 and 10 days postharvest, shorter than other fresh berries such as strawberries and blueberries.

Banana Imports Are the Lowest in a Decade

Bananas have the highest per capita availability of any fresh fruit in the United States, averaging 26.6 pounds available per person each year (2022–24). Because bananas grow in tropical zones near the equator, fresh bananas are imported to the United States from countries in nearby tropical regions. From 2022–24, an average of 10.3 billion pounds of bananas were imported to the United States each year—the equivalent of 856 million pounds every month.

In 2025, fresh banana import volume decreased to 10.1 billion pounds, down 3.4 percent from 10.4 billion pounds in 2024 and the lowest since 2013. This decline was driven by the second consecutive year of lower import volume of conventional bananas, coupled with higher unit prices. Cooler temperatures, excessive rainfall, and damage from tropical storms reduced exportable volumes for major suppliers of fresh bananas to the United States (including Guatemala and Costa Rica). Conversely, organic banana imports rose for the third consecutive year to a record high of 1.55 billion pounds in 2025, accounting for about 15 percent of all U.S. fresh banana imports. With lower total fresh banana import volume from major suppliers, preliminary per capita availability of fresh bananas decreased year over year to 25.4 pounds per person in 2025. This estimate marks the lowest availability per person since 2009.

Bananas are shipped to the United States year-round. In the first 5 months of 2026, total fresh banana imports were 3 percent higher by volume and 12 percent higher by value compared to the same period in 2025. Organic fresh banana imports were 5 percent higher by volume and 26 percent higher by value on higher shipments from Ecuador, Mexico, and Colombia.

Average national-level banana retail prices reported by the U.S. Bureau of Labor Statistics were higher year over year through April 2026 before dropping below previous year levels in May and June 2026. Banana prices averaged 65 cents per pound in the first 4 months of 2026, about 5 percent above the same period in 2025.

Fresh Pineapple Imports Are Available Year-round

The United States has been the top global importer of fresh pineapples each year since 1997, according to data from the Food and Agriculture Organization of the United Nations (FAO). In 2025, fresh pineapple imports to the United States totaled 2.88 billion pounds—the second highest on record and about 1 percent below the record high of 2.92 billion pounds set in 2024. The demand for fresh pineapple in the United States has increased in recent years. Fresh pineapple per capita availability was 8.4 pounds per person in 2025—similar to other popular fresh fruits, such as strawberries and avocados.

Costa Rica is the top supplier of fresh pineapples to the United States, accounting for 86 percent of import volume in 2025. The pineapple industry in Costa Rica has grown rapidly in recent decades, with pineapple acreage increasing from 12,500 acres in 2000 to over 50,000 acres in 2024. The United States is the top destination for fresh pineapples from Costa Rica, accounting for about 54 percent of fresh pineapple export volume on average in recent years.

Fresh pineapples are shipped to the United States year-round. In the first 5 months of 2026, the import volume of fresh pineapples was 2 percent lower than the same period in 2025. Fresh pineapple imports from Costa Rica were 7 percent lower year to date through May 2026, in part due to adverse weather conditions and heavy rainfall that negatively impacted plantings in 2025.

Record Fresh Mango Imports in 2025

In 2025, fresh mango imports to the United States increased to a record high of 1.32 billion pounds, up 11 percent year over year and surpassing the previous high of 1.27 billion pounds in 2022. Record import volume pushed fresh mango per capita availability upward to 3.8 pounds per person in 2025, more than double the 2000–2002 average of 1.8 pounds per person.

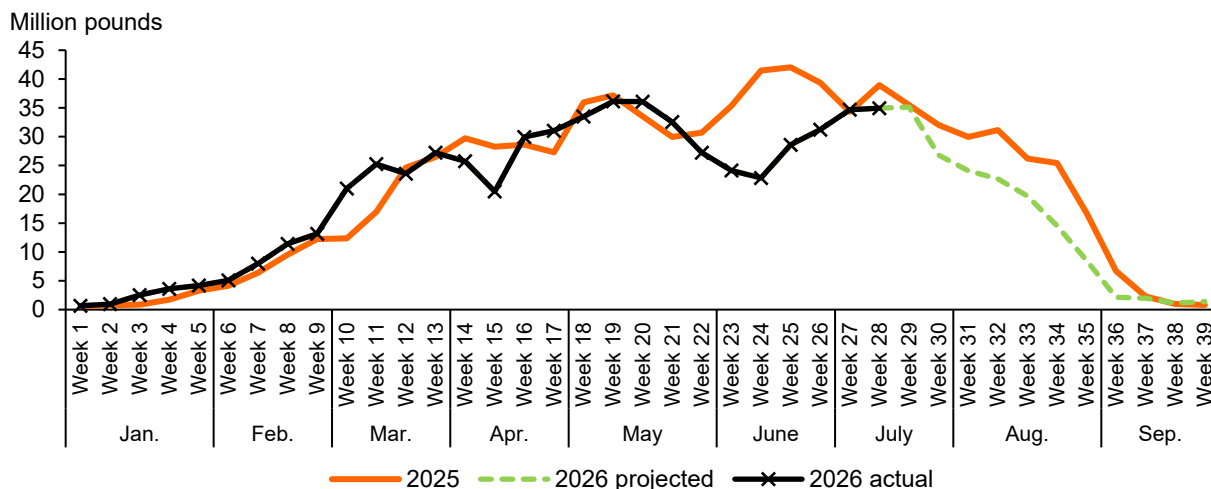
Mexico is the top supplier of fresh mangoes to the United States, accounting for 63 percent of import volume in 2025. Peru, Ecuador, and Brazil collectively accounted for an additional 32 percent of fresh mango imports. Record high volumes of fresh mangoes were imported from the top two suppliers, Mexico and Peru, in 2025. Fresh mango exports from Mexico are largely destined for the United States, accounting for about 87 percent of fresh mango, guava, and mangosteen export volume on average in recent years. About 35 percent of Peru's fresh mango, guava, and mangosteen exports were destined for the United States, with a large share of Peru's fresh mango exports headed for the European market.

Fresh mangoes are shipped to the United States year-round, but volumes are highest in the spring and summer months. In the first 5 months of 2026, the import volume of fresh mangoes was flat year over year. Higher mango volumes from Mexico through May offset lower volumes from Peru. Data from the National Mango Board indicate that mango shipments from Peru were lower for the 2025/26 season (October 2025–April 2026). Elevated nighttime temperatures reduced flower induction, and unusually cold weather in late November and early December 2025 delayed fruit ripening. Mango shipments from Mexico are expected to be lower year over year in 2026, particularly as the season continues into August (figure 11). Cold weather in

March negatively impacted flowering in the state of Nayarit, while warm temperatures negatively impacted mangoes in Sinaloa.

Figure 11

Mexico's mango shipments to the United States are projected lower in 2026



Source: USDA, Economic Research Service based on data from National Mango Board, *crop report* (released July 16, 2026).

Record Fresh Papaya Imports in 2025

In 2025, fresh papaya imports to the United States increased to a record high of 545 million pounds, up 10 percent year over year and surpassing the previous high of 501 million pounds set in 2023. Record import volume pushed fresh papaya per capita availability upward to 1.6 pounds per person in 2025, the highest on record and more than double the 2000–2002 average of three-quarters of a pound per person.

Papayas are native to tropical regions in the Americas, originating from southern Mexico and Central America. Fresh papayas are shipped to the United States year-round, though volumes are typically lower during the late fall and winter months. In the first 5 months of 2026, the U.S. import volume of fresh papayas was 8 percent higher than the same period in 2025. Higher volumes from Mexico more than offset lower volumes from Guatemala year to date. Mexico's papaya industry has expanded in recent years, and acreage has increased from just over 14,000 acres in 2010 to over 20,000 acres in 2024. Almost all papaya exports from Mexico (99 percent) are destined for the United States.

Melons Outlook

U.S. Watermelon Shipments Are Lower in 2026

U.S. watermelons are available from April to October, with shipments typically highest in the summer months. Watermelons are imported to the United States year-round, though most enter between October and June when domestic volumes are lower. Almost all watermelon imports to the United States originate from 3 countries: Mexico (80 percent), Guatemala (15 percent), and Honduras (4 percent). Watermelons from Mexico are shipped year-round but volumes are often highest in April and May.

In the first 5 months of 2026, watermelon import volume was 5 percent lower than the same period in 2025. Though year-to-date watermelon imports from Mexico were unchanged from last year, shipments from Guatemala and Honduras were lower year over year, down 12 percent and 25 percent, respectively. Downy mildew, which thrives in cool and wet conditions, negatively impacted melons from Central America due to unseasonably cool and humid weather during the growing season.

Watermelons are grown throughout the United States, and the top producers are Georgia, Florida, California, and Texas. Shipments of domestically grown watermelons begin in Florida in spring. Shipments begin in Arizona, Texas, and southern California's Imperial Valley in May, before shifting northward to Georgia and central California in June. Through the third week of July (week 29), USDA, AMS movement data indicate that U.S. watermelon shipments were about 4 percent below last season.

In 2026, the watermelon season began later than usual in Florida, due in part to freezing temperatures in early March that damaged watermelon plants and necessitated total or partial replanting of watermelon fields by some Florida growers. Weekly watermelon shipments from Florida were lower year over year through mid-May before exceeding last season's volume week over week through early July. Season-to-date volume for Florida watermelons was 6 percent higher by the third week of July (week 29) as the season wound down.

The watermelon season began earlier than usual this year in Arizona and California's Imperial Valley, due to unseasonably warm temperatures in winter and spring. Though early season watermelon shipments from the Arizona-California desert region were higher, weekly volumes fell below last season by mid-June and remained lower as the summer progressed. Warm weather intensified pest pressure in this season's watermelon crop, lowering yields.

Watermelon shipments from Texas began in May and will continue into autumn. Season-to-date volume for Texas watermelons was down sharply by the third week of July (week 29) compared to the same period last year. Watermelon growers in the Rio Grande Valley reported that intense rainfall led to poor pollination and an increase in weed, insect, and disease pressure in watermelon fields.

Cantaloupe and Honeydew Shipments Are Down in 2026

U.S. cantaloupe and honeydew melons are available from May to November, with shipments typically highest in the summer. Most imported fresh cantaloupe and honeydew melons enter the domestic market during the winter or spring months. Almost all cantaloupe imports to the United States originate from 4 countries: Guatemala (68 percent), Honduras (18 percent), Costa Rica (7 percent), and Mexico (7 percent). Similarly, almost all honeydew imports are from 3 countries: Guatemala (45 percent), Mexico (39 percent), and Honduras (15 percent).

In the first 5 months of 2026, cantaloupe import volume was 3 percent lower and honeydew import volume was 7 percent lower than the same period in 2025. Downy mildew in melon fields in Guatemala and Honduras reduced fruit set and lowered yields this season, while cooler than normal temperatures slowed plant growth and reduced fruit size. Year to date through May 2026, cantaloupe and honeydew imports from Guatemala were lower year over year (down 14 percent and 10 percent, respectively). Cantaloupe imports from Honduras were 37 percent higher year over year but below the previous 3-year average. The 2025 cantaloupe season in Honduras was negatively impacted by flooding from Tropical Storm Sara in late autumn 2024. While cantaloupe imports from Honduras have rebounded this season, they remain about 8 percent below the 2022–24 average. Honeydew imports from Mexico were 6 percent higher year over year but did not offset lower volumes from Central America.

Through the third week of July (week 29), USDA, AMS movement data indicate that U.S. cantaloupe and honeydew shipments were below last season. The cantaloupe and honeydew seasons began earlier than usual in Arizona and California's Imperial Valley in 2026, due to unseasonably warm temperatures in winter and spring. Warm conditions exacerbated pest and virus pressure in the Arizona-California desert region, hampering both the quantity and quality of cantaloupe melons. Silverleaf whitefly populations did not experience the typical winter die-off due to a lack of cold winter temperatures, and these pests harm the plant's ability to photosynthesize. Though early season melon shipments were higher than last year in May, volumes from the Arizona-California desert region were well below last season in June.

Tree Nuts Outlook

Early in November 2025, temperatures in California were unseasonably warm. However, a thick, ground hugging fog (known as “tule” fog) enveloped the Central Valley from late November through early December, cooling temperatures, and helping California nut trees meet 2026 chill hour requirements (time spent at temperatures between 32 and 45 degrees Fahrenheit). Weather stations across the Central Valley recorded more than 500 chill hours accumulated, on average, from November 1, 2025 to January 15, 2026. Though the number of chill hours accumulated was similar to the 10-year average, it was an improvement from 2024/25, when an average of approximately 410 chill hours were recorded.

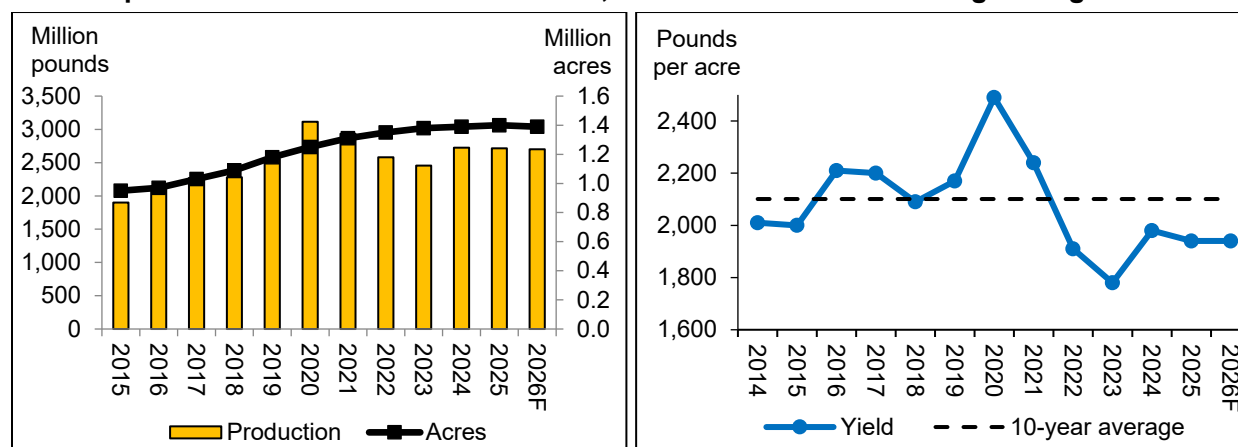
Insofar as almond bloom and pollination were concerned, bud break in California began in early February and progressed quickly, particularly in the Sacramento Valley. Unfortunately, peak bloom for many almond varieties coincided with stormy weather, which limited both bee flights and grower activities (including fungicide and fertilizer applications).

Almond Bearing Acreage Drops for the First Time in Decades

The USDA, NASS May 2026 *Crop Production* report projects that almond production will drop by 15 million pounds (0.6 percent) in 2026. The decline is driven by a 10,000-acre (0.7-percent) decrease in bearing acreage. Over the last three decades, almond bearing acres have more than tripled, rising from 418,000 acres in 1995 to 1.4 million acres in 2025. In 2026, after 30 years of year-over-year increases, bearing acreage is projected to fall, from 1.4 million acres in 2025 to 1.39 million acres in 2026 (figure 12). The 2026 crop forecast is 2.7 billion pounds (on a shelled basis), similar to the 2024 and 2025 crops.

Figure 12

Almond production is forecast lower in 2026, due to decreases in bearing acreage



F = Forecast.

Note: Production and yield are shelled equivalents.

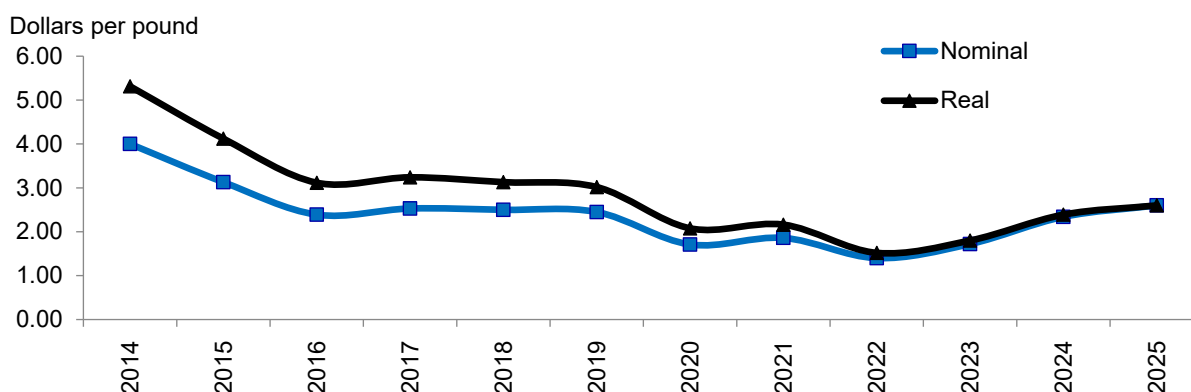
Source: USDA, Economic Research Service using data from the USDA, National Agricultural Statistics Service.

Over the last 10 years, almond yields averaged about 2,100 pounds per acre. Since 2022, yields have been lower than this due to: drought in 2022, storms that disrupted pollination in 2023, summer heat in 2024, and storms during harvest in 2025. Though there was adequate chilling last winter, NASS forecast 2026 yields at 1,940 pounds per acre, unchanged from 2025, but approximately 8 percent lower than the 10-year average. One contributing factor is high input prices, which may have decreased growers' fertilizer and pesticide use in 2026.

Increases in input prices have contributed to shrinking profit margins over the last decade, but decreases in output prices have also played a role. In 2014, almond prices reached a record level \$4 per pound, which is equal to \$5.31 per pound in 2025 dollars (figure 13). Since 2014, increases in almond production have put downward pressure on prices, which decreased to a low of \$1.40 per pound in 2022 (in part due to historically high carry-over). Almond prices have increased recently, reaching \$2.60 per pound, on average, in 2025. Recent increases in prices have helped almond growers cover their costs, although profit margins are still tighter than they were a decade ago.

Figure 13

Almond prices have increased in the last three seasons



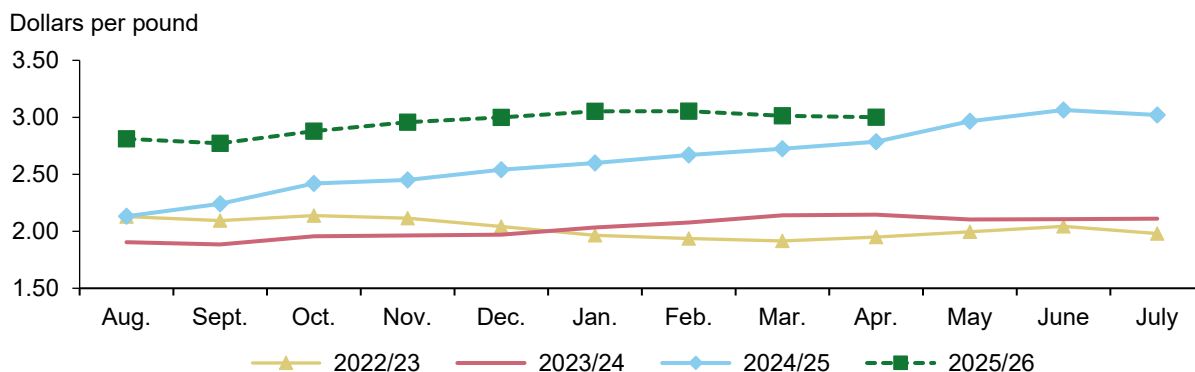
Note: The CPI-U has been rescaled such that the base year is 2025. Prices are in dollars per pound of shelled equivalents. Prices are marketing season average; USDA, NASS defines the marketing season for almonds as August 5 through November 15. Source: USDA, Economic Research Service using data from the USDA, National Agricultural Statistics Service and the U.S. Department of Labor, Bureau of Labor Statistics, gross domestic product (implicit price deflator), index 2017=100, annual, not seasonally inflated.

A 2024 Costs and Returns Study conducted by the University of California Davis, Department of Agricultural and Resource Economics suggests that almond growers producing 1,940 pounds per acre (as NASS estimates them to be this year) earn enough revenue to cover their operating costs (i.e. break-even) when almond prices are around \$2.25 per acre. Average prices received in 2024 and 2025 were above this threshold. Recent unit values of shelled almond exports indicate that prices are poised to remain above break-even through the end of the 2025/26 marketing season (figure 14). Prices in 2026/27 will be driven by the size and

quality of the 2026 crop. Uncertainty about these crop attributes will resolve as the summer progresses and throughout the fall harvest season.

Figure 14

Unit values of U.S. shelled almond exports were higher in the first three-quarters of marketing year 2025/26 than in 2024/25, 2023/24, or 2022/23



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

2025/26 almond exports are on pace to exceed exports in 2024/25: In 2025, the United States produced more than three quarters of the world's almond supply and shipped more than 80 percent of global almond exports (by volume). The most recently published trade data from the U.S. Department of Commerce, Bureau of the Census indicate that approximately 1.773 billion pounds of almonds (on a shelled basis) were exported from August 2025 through May 2026 (i.e. the current marketing year to date). This number is approximately 43.4 million pounds (2.5 percent) more than over the same period in 2024/25, and 91.6 million pounds (5.4 percent) more than the 5-year (year-to-date) average.

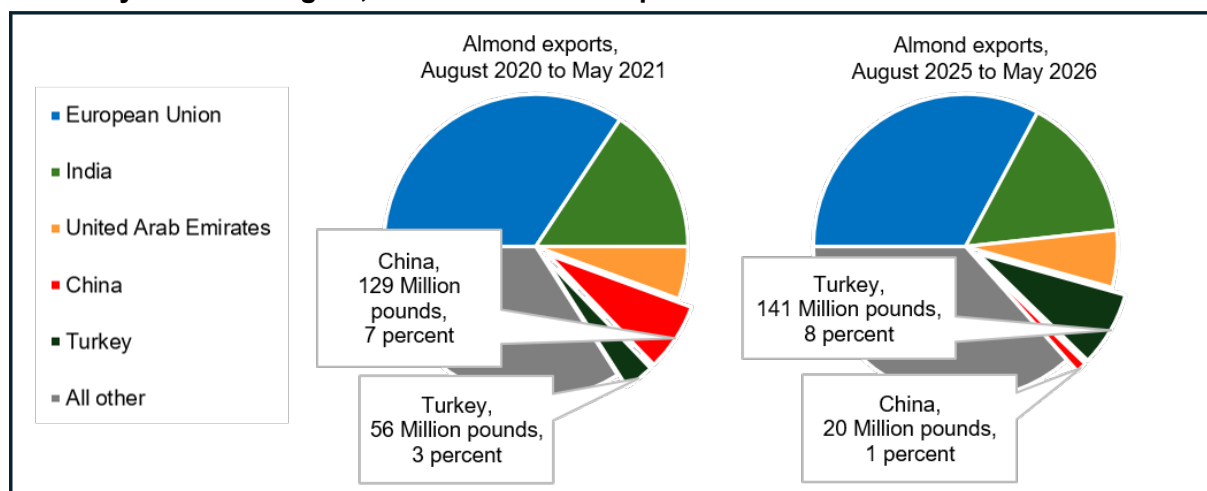
Generally, almond export growth was driven by increases in trade with Turkey, the European Union, and Morocco—which rose by 42.5 million pounds (43 percent), 33.3 million pounds (6 percent), and 23.2 million pounds (41 percent), respectively, from year-to-date 2024/25 levels. These increases were partially offset by a 13-million pound (4.5-percent) decrease in trade with the United States' largest (single-nation) almond trade partner, India. Almond shipments also decreased to other trade partners—including the United Arab Emirates, China, and Japan. Almond shipments to these trade partners decreased by 31.6 million pounds (23 percent), 18.3 million pounds (48 percent), and 12.6 million pounds (15 percent), respectively.

Over the past decade, U.S. almond export patterns have experienced both change and continuity. Since 2014/15 (when almond prices peaked), the European Union, India, and the United Arab Emirates have consistently been among the top destinations for U.S. almond exports. Together, these countries account for more than half of total U.S. almond exports. However, almond trade with China and Turkey has shifted notably since 2020 (figure 15).

During the marketing period from August 2020 to May 2021—amid a record almond crop and Coronavirus (COVID-19) global pandemic-related supply chain disruptions—China imported about 7 percent of U.S. almond exports, ranking behind only the European Union (34 percent) and India (16 percent). In contrast, Turkey accounted for just 3 percent of U.S. almond export shipments, making Turkey the seventh largest U.S. almond trade partner at that time.

Figure 15

From August 2025 through May 2026 almond exports to China were much lower, and exports to Turkey are much higher, than over the same period in 2020/21



Note: On a shelled basis, U.S. producers exported 1.783 million pounds of almonds from August 2020 to May 2021; 1.772 million pounds were exported over the same period in 2025/26.

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

China imported approximately 1 percent of almond exports from the United States from August 2025 to May 2026, 109.4 million pounds lower than over the same period in 2020/21. By contrast, Turkey has imported almost 8 percent of almond exports from the United States, 84.9 million pounds (151 percent) higher than in 2020/21.

Per capita almond availability is on pace to drop for the second consecutive year:

According to the June 2026 *Almond Industry Position Report* from the Almond Board of California, season-to-date domestic almond shipments in 2025/26 were approximately 13 percent lower than the same period in 2024/25. If this trend continues, per capita almond availability (shelled basis) in 2025/26 will drop below the 2024/25 estimate of 1.9 pounds per person. This decrease would also be the fifth straight year that U.S. almond availability remains below the record high of 2.5 pounds per person set in 2020/21.

Lower Import Volumes Pressure U.S. Cashew Market

The ERS *Fruit and Tree Nuts Yearbook* includes annual per capita availability data for almonds, hazelnuts, pecans, walnuts, macadamia nuts, pistachios, and other tree nuts. The domestic availability for “other tree nuts” is derived from imports and exports of cashews, chestnuts, pine nuts, Brazilian nuts, and mixed nuts.³ For 2025, the per capita availability estimate is about 1.2 pounds per person on a shelled basis, a 21-percent decline from the previous year. The reduction in other nut availability was driven by lower shelled cashew imports, which were the largest U.S. tree nut import category by volume.

The United States does not commercially produce cashews. The largest cashew-producing countries are concentrated in tropical regions within Africa and Southeast Asia. In 2024, 4 countries accounted for about 60 percent of global cashew production: Côte d'Ivoire (22 percent), India (19 percent), Tanzania (12 percent), and Vietnam (7 percent), according to production data from the Food and Agriculture Organization of the United Nations (FAO). Brazil, where the cashew tree (*Anacardium occidentale*) is native, was the only South American country ranked in the top 10 producers globally.

Unique nut to crack: In-shell cashews, also referred to as Raw Cashew Nuts (RCN), are not sold directly to consumers. This is because the cashew shell surrounding the kernel contains a corrosive oily mixture (urushiol) that is also found in poison ivy. Exposing in-shell cashews to high heat treatment by steaming or roasting helps neutralize the corrosive mixture before splitting, peeling, and drying. The delicate shell-splitting process, whether mechanized or using manual labor, is a particularly important step due to the price premium for whole shelled cashews compared to kernel pieces. Under these unique requirements, a comparative advantage in processing efficiency and labor cost has led countries such as Côte d'Ivoire and Tanzania to historically export large volumes of in-shell cashews to India and Vietnam where nuts are shelled and re-exported or consumed domestically.

Increase in cashew demand: In 2024, the two largest importers of shelled cashews in the world were the European Union (411 million pounds) and the United States (389 million pounds), according to data from Trade Data Monitor, LLC. Consumer demand for shelled cashews has increased in both countries since the turn of the century. In the United States, annual cashew imports rose from an average of 191.5 million pounds in 2000–2002 to more than 344 million pounds in 2022–2024 (figure 16). During this same period, U.S. shelled cashew

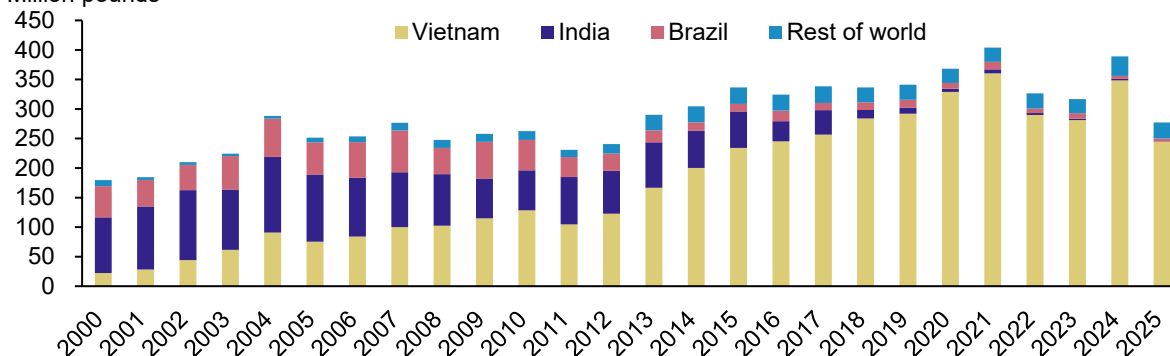
³ The USDA, ERS *Fruit and Tree Nuts Yearbook* “other tree nut” per capita availability estimate does not include import or export trade identified exclusively as coconuts, processed coconut products, or dried/processed peanuts.

imports shifted from India and Brazil (80 percent in 2000–2002) to Vietnam (89 percent in 2022–2024). Vietnam cashew exports began trending upward in the early 2000s, gradually becoming the largest global shelled cashew exporter and top supplier to both the European Union and the United States. The increase in cashew exports from Vietnam was supported by specialized processing centers that shell regional production and large volumes of in-shell imports (primarily from African countries).

Figure 16

U.S. shelled cashew import volume fell to 12-year low in 2025

Million pounds



Note: Only includes import volume under the International Harmonized Commodity Coding and Classification System (HS) 6-digit level code 8001.32, cashew nuts, fresh or dried, shelled.

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

Lower cashew imports last year: In 2025, U.S. shelled cashew imports fell to 277.3 million pounds, the first time in 12 years annual volume fell below 300 million pounds. Volume declined 29 percent from the previous year (down 111.7 million pounds), while value decreased 20 percent amid higher average unit values. This sharp drop followed the second highest cashew import volume on record in 2024. Multiple factors contributed to reduced U.S. cashew import volumes and higher unit values in 2025, including higher U.S. tariffs on imports from Vietnam and stronger cashew import demand in China and the European Union. At the same time, policy changes in several African countries affecting in-shell cashew exports further supported global prices and raised raw material costs for Vietnamese processors.

U.S. cashew imports in 2026: Year-to-date U.S. shelled cashew imports (January–May 2026) totaled 123.7 million pounds, 11 percent higher than the same period last year but 9 percent behind the previous 5-year average. Average prices continued to remain firm this year, reflected by import unit values, which were unchanged compared to 2025. Recent earnings reports from two major companies known for branded snack nut products indicated retail margins in early 2026 were pressured by increased fuel costs and trade disruptions for import-dependent commodities. Despite uncertainty in global cashew supply and prices in 2026, ERS expects geopolitical headwinds and higher fuel costs will continue to influence domestic cashew prices and U.S. import volumes in the latter half of the year.

Suggested Citation

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