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Fruit and Tree Nuts Outlook: July 2025

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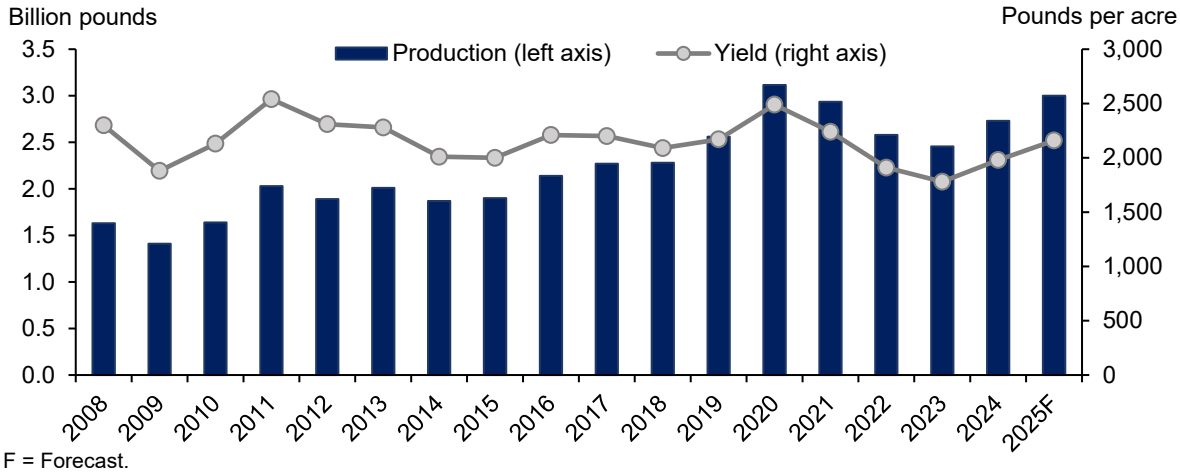
2025 California Almonds Set for Another Near-Record Crop

The USDA, National Agricultural Statistics Service (NASS) *2025 California Almond Objective Measurement Report* predicts that approximately 3.0 billion pounds of almonds will be produced in 2025. If so, the 2025 almond crop would be the second largest on record, smaller only than the 3.1 billion pounds produced in 2020. The increase in production is due to a 9 percent year-over-year increase in yield. USDA, NASS projects the 2025 almond yield at 2,160 pounds per acre. This yield estimate is higher than the previous three seasons, but not statistically different from the 10-year average (2,123 pounds per acre). Preliminary 2025 almond bearing acreage is up less than 1 percent (10,000 acres) from last year, totaling a record 1.39 million acres.

California almond production and yield, 2008–25F



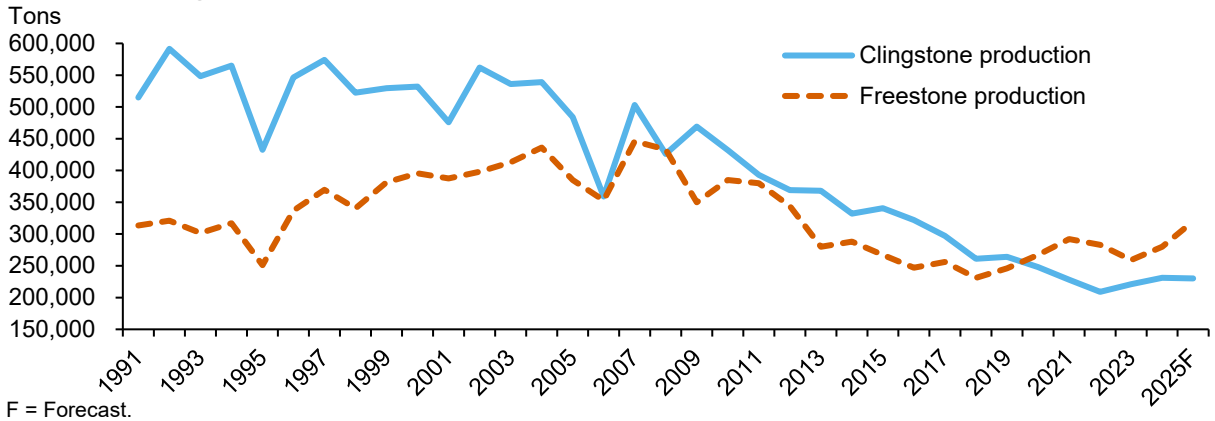
F = Forecast.
Note: Production is in shelled basis (nut meat) equivalents.
Source: USDA, Economic Research Service using data from the USDA, National Agricultural Statistics Service *2025 California Almond Objective Measurement Report*.

Noncitrus Fruit Outlook

California Peaches: Production Forecast Is Up in 2025

California is the top U.S. peach-producing State, accounting for 75 percent of U.S. production volume and 64 percent of value in 2024. The 2025 USDA, NASS May *Crop Production* forecast for California peach production is 550,000 tons, a 4-percent increase from 2024 and 11 percent higher than the previous 3-year average. California peaches are categorized as either freestone or clingstone varieties. If the 2025 production forecasts are realized for clingstone (230,000 tons) and freestone (320,000 tons), it would mark the 6th year in a row more freestone peaches were produced than clingstones (figure 1). USDA, NASS will release another peach production forecast for California and six additional States in the August *Crop Production* report.

Figure 1
California clingstone and freestone peach production, 1991–2025F



F = Forecast.
Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, Quick Stats and *Noncitrus Fruit and Nuts Final Estimates (various issues)*.

California clingstones: On average, clingstone peaches are grown almost exclusively for the processing market (primarily canned and frozen), while about three-fourths of California freestone peaches are destinated for the fresh market. Clingstone peaches are characterized by a firmer flesh that is more tolerant to pitting and heat treatment during the canning process. Clingstone peaches tend to be higher yielding and have lower prices than freestone peaches. After peaking in 2004 at 32,000 acres, California clingstone bearing acreage has steadily fallen, totaling less than 14,000 in 2024. California freestone bearing acreage has also declined since the early 2000s but has increased slightly from a 2017 low (21,000 acres) to 25,000 bearing acres in 2024.

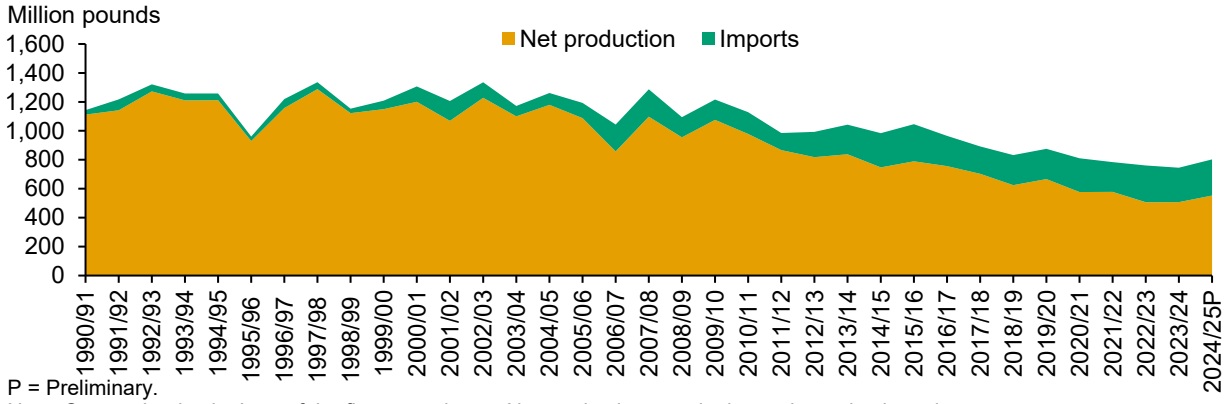
The USDA, NASS May production forecast for California clingstone peaches is a 1,000-ton decrease (-0.4 percent) from last year. Like California cherry growers this season, industry reports note inconsistent fruit set in some clingstone orchards. However, relatively mild

temperatures in June, especially compared to last season's high summer temperatures, have supported fruit development. The harvest of California clingstone peaches typically begins in late June or early July and continues through early September. In early July 2025, the California Canning Peach Association (CCPA), the cooperative bargaining association in the industry, was still negotiating its 2025 base-price agreement with one of the two largest processors. Weekly season-to-date delivered tonnage to peach processors usually reaches the halfway point by early August. After the second week of July 2025, California clingstone peach deliveries totaled about 13,600 tons, a 36-percent increase from the same time last year, based on reports issued by the California League of Food Producers (CLFP). This number represents 6 percent of the season's total expected delivery volume (224,383 tons) to peach processors according to the CLFP *Block-by-Block* 2025 estimate. According to CCPA, California produces nearly all domestically produced canned and plastic-packaged peaches (including mixed fruit products like fruit cocktail).

Canned peach imports: While net production (production minus exports) of canned peaches has trended lower in the last two decades, imports have trended higher. Throughout the 1990s, canned peach import volume was less than 80 million pounds each marketing year and represented less than 10 percent of domestic supply (figure 2). In the last 3 marketing years (2022/23–2024/25), canned peach import volume averaged almost 250 million pounds and accounted for more than 30 percent of domestic supply. The increased share of canned peach domestic supply from imports reflects relatively steady import volume in the last 10 years, coupled with declining domestic production. More than 80 percent of U.S. canned peach imports come from China and Greece. In the past three seasons, canned peach imports from Greece and China each accounted for about 13 percent of domestic supply.

Figure 2

U.S. canned peach domestic availability (product-weight[1])



P = Preliminary.
Note: Season begins in June of the first year shown. Net production equals domestic production minus exports.
[1]Domestic canned utilization production estimates converted to product weight. Starting in 2018/19, canned production is based on 5-year average share (75 percent) of total processed production. Product weight is equal to fresh weight multiplied by 1.2.
Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service and U.S. Department of Commerce, Bureau of the Census.

Fresh-market peaches: California freestone harvest begins in late June and continues through September. South Carolina and Georgia (second and third top peach producing States behind California) tend to start the harvest in May and are largely finished by the end of July. Fresh peach shipment volumes of early varieties (May–June) from California were lagging last year according to data from USDA, Agricultural Marketing Service (AMS), *Market News*, but weekly free-on-board (FOB) prices were similar to last season. Clemson Agricultural Extension reports indicate this year's South Carolina peach crop is generally in fair condition with rainy and humid summer weather leading to increased disease pressure. At the end of June 2025, 81 percent of Georgia's peach crop was reported in good-to-excellent condition by USDA, NASS, which is similar to the 5-year average. By July 20, 2025, the peach harvest in Georgia was 85 percent complete, similar to the 5-year average (83 percent). This year's fresh-market peach season will be discussed in more depth in the *Fruit and Tree Nuts Outlook: September 2025*.

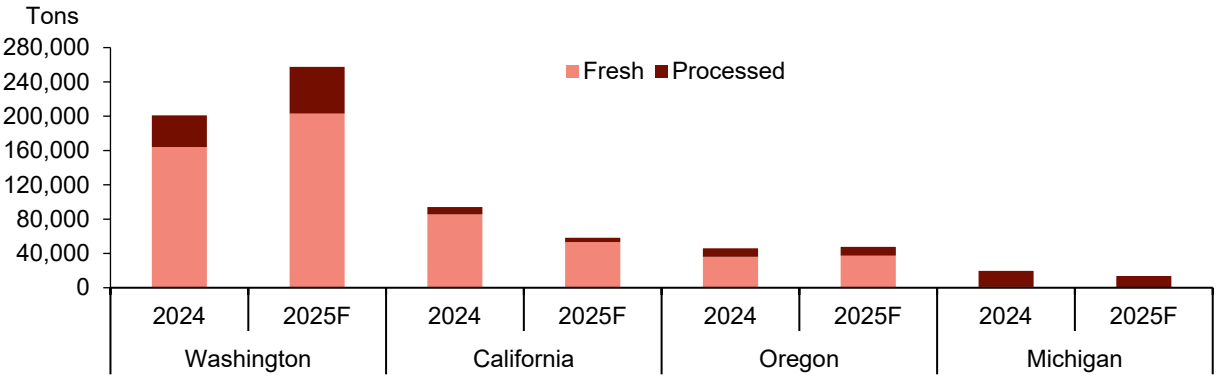
Sweet Cherry Forecast Is Up in Washington

The 2025 USDA, NASS June *Crop Production* forecast for sweet cherries in the four NASS-surveyed States is 383,000 tons (766 million pounds), up 4 percent from a year ago. Production increases in Washington (up 29 percent) and Oregon (up 4 percent) offset declines in California (down 38 percent) and Michigan (down 31 percent). Top State Washington is expected to account for 68 percent of 2025 U.S. sweet cherry production. At 260,000 tons, the Washington sweet cherry forecast is 58,000 tons more than last season and the largest crop in 8 years. Industry reports indicate Washington orchards experienced favorable spring bloom and early summer growing conditions this season. Weekly shipment volumes and price data through early July also indicate a steadier supply and demand situation this year compared to the compressed harvest window experienced two seasons ago. In California, San Joaquin County, which produces about 80 percent of California's sweet cherries, reportedly experienced lower yields. In early May 2025, the San Joaquin Agricultural Commissioner requested a disaster declaration for its sweet cherry growers citing spring heat and excessive rain as contributing to lower yields and crop loss.

In 2024, U.S. sweet cherry production value totaled more than $817 million, ranking sixth in the noncitrus fruit value—behind grapes, strawberries, apples, cultivated blueberries, and peaches. Since the turn of the century, the majority of U.S. sweet cherries has been destined for the fresh market. Last year, fresh-market sweet cherry production was 286,440 tons, accounting for about 80 percent of volume and 93 percent of value. In California, Oregon, and Washington, most sweet cherries go to the higher value fresh market (figure 3). In contrast, Michigan's sweet cherries have historically gone to processing. If all four States follow previous utilization

patterns, the 2025 U.S. fresh-market sweet cherry crop will total about 294,000 tons, a 3-percent increase from last year.

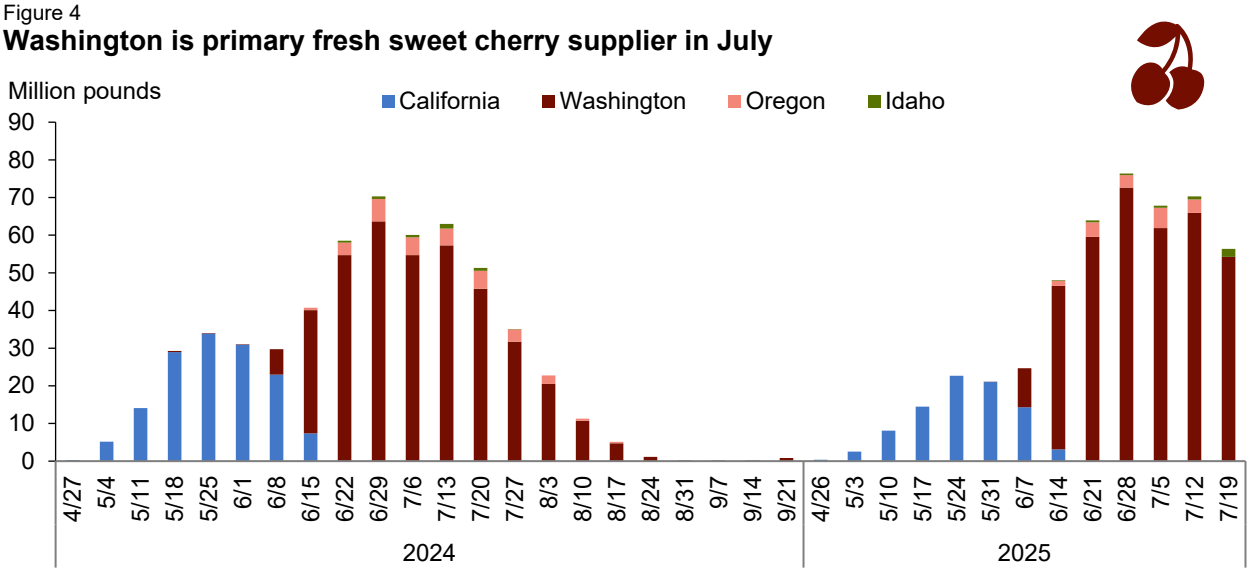
Figure 3
Most sweet cherries are destined for the fresh market



F = Forecast.
Note: 2025 forecast for Washington, California, and Oregon assumes share of production utilized as fresh or processed equals the 3-year average (2022–24). Due to gaps in survey data, the 3-year average share for Michigan is based off 2016, 2017, and 2024.
Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, *Noncitrus Fruit and Nuts Summary, various issues and Crop Production (June 2025).*

Seasonal shipments in 2025: Each year, the timing and volume of fresh cherry shipments in West Coast States impact U.S. sweet cherry domestic availability and grower prices. In general, fresh sweet cherry shipments begin in California in late April and end in mid-June, as production in Washington (the top sweet cherry producer) increases. Figure 4 shows the variability in domestic volumes and origin in the past two seasons, according to USDA, AMS *Market News* movement data. In 2025, weekly fresh cherry shipments from California lagged throughout May and June with largest year-over-year declines in early and late season varieties. The lower volumes from California elevated average FOB prices throughout May and early June.

Figure 4
Washington is primary fresh sweet cherry supplier in July



Note: Domestic shipments only.
Source: USDA, Economic Research Service using data from USDA, Agricultural Marketing Service, *Market News* movement data.

Washington began shipping small volumes of early-season cherry varieties with minimal overlap with California's crop in June. Domestic shipment volumes of fresh sweet cherries from Washington were 17 percent higher from June through July 20, 2025. FOB prices for Washington fresh sweet cherries fell seasonally in late June through early July, with weekly prices lower than last year but slightly higher than 2 years ago.

Fresh sweet cherry trade: About 30 percent of U.S. fresh-market sweet cherry production volume in the last two seasons was exported. In 2024, U.S. fresh sweet cherry export volume totaled 184.7 million pounds, 4 percent higher than 2023 and the largest volume in 7 years. Most sweet cherry exports (75 percent by volume) were shipped in June and July. The organic sweet cherry export volume reached a record 15.5 million pounds, which represented 8 percent of total fresh sweet cherry exports. In April–May 2025, early season fresh sweet cherry exports were down 60 percent by volume and 45 percent by value, reflecting California's shorter crop. In 2025, export shipments of fresh sweet cherries from Washington (reported by the Washington State Department of Agriculture) indicate season-to-date volumes (June 1 through July 20) were up to top destinations Canada, South Korea, Taiwan, and Japan—but down to China, compared to the same period last year.

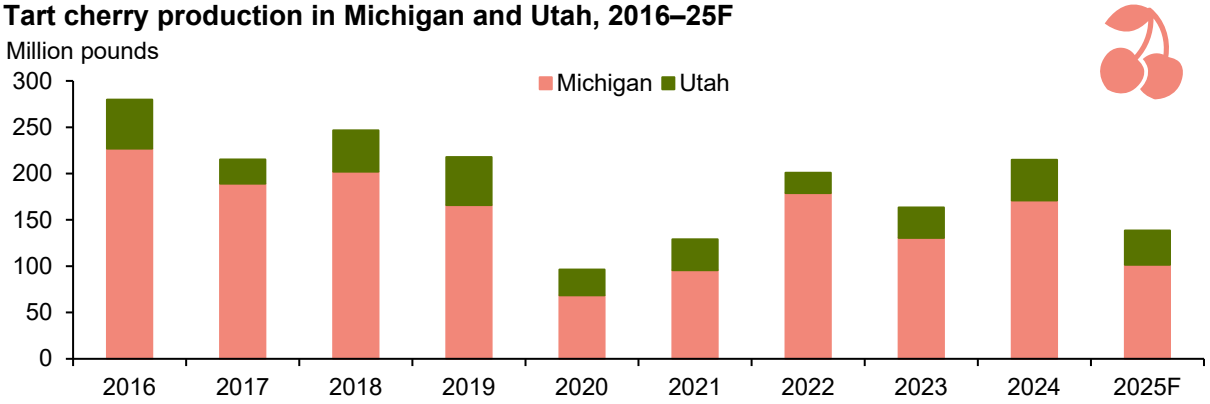
Fresh sweet cherry imports generally represent less than 10 percent of available domestic supply. Outside of the domestic season, the United States imports from Southern hemisphere suppliers Chile and Argentina, with import volumes peaking during the winter months. Between November 2024 and March 2025, the United States imported 45.2 million pounds of fresh sweet cherries from Chile and 5.8 million pounds from Argentina, which accounted for 98 percent of total import volume for that period. Imports from Canada, which typically occur in July and August, totaled less than 1 million pounds in 2024 (down 92 percent year over year). Smaller sweet cherry imports from Canada last year were largely attributable to a damaging winter freeze in British Columbia.

2025 Tart Cherry Production Forecast to Decline

Tart cherries (*Prunus cerasus*), also known as sour cherries, are a distinct species of stone fruit that is closely related to sweet cherries (*Prunus avium*). Similar to sweet cherries, the harvesting of tart cherries is also highly seasonal and runs from June through mid-August. The USDA, NASS June *Crop Production* forecast for the 2025 tart cherry crop is 138.5 million pounds (69,250 tons) in the top two producing States, down 36 percent from the previous year (figure 5). Michigan, the largest tart cherry producing State, is forecast at 101.5 million pounds—41 percent lower than last season and the smallest crop since 2021. Michigan tart cherry growers

reported a lighter fruit set this season. Northwest Michigan, the largest tart cherry producing region in the State, is expected to have the largest year-over-year decline. The 2025 production forecast in Utah is 37 million pounds, down 16 percent (6.8 million pounds) from 2024 but 13 percent above 2023.

Figure 5
Tart cherry production in Michigan and Utah, 2016–25F



F = Forecast.
Source: USDA, National Agricultural Statistics Service, *Noncitrus Fruit and Nuts Summary*, various issues and *Crop Production* (June 2025 issue).

Starting in 2024, USDA, NASS no longer reports tart cherry production estimates for Washington, New York, or Wisconsin—which typically represented about 19 percent of annual U.S. production (2019–23), or 39 million pounds. However, the initial Cherry Industry Administrative Board (CIAB) 2025 production estimate for these States totals 37 million pounds, down 3 percent from the 2024 estimate of 38.3 million pounds. CIAB expects a year-over-year increase in Washington to be offset by a decline in Wisconsin this season.

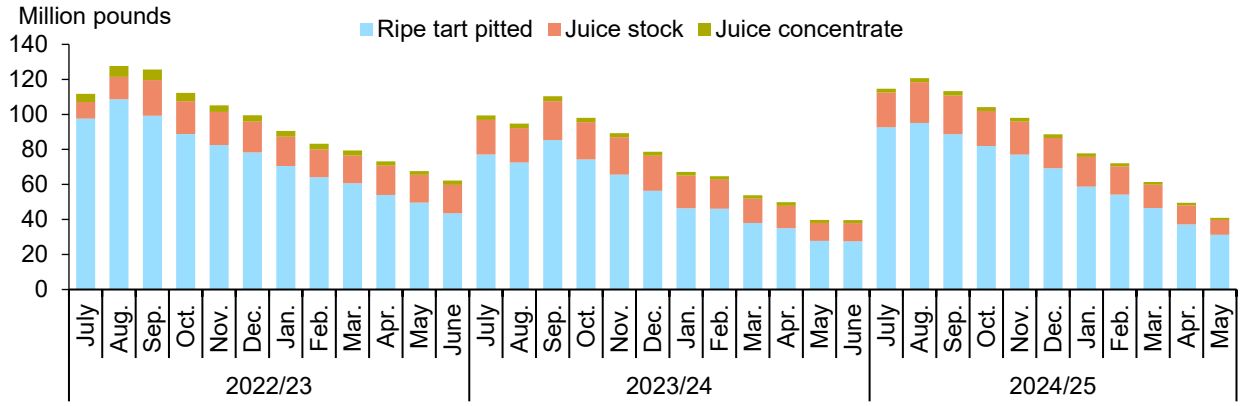
Carry-in inventory lower in 2025/26: On average, 99 percent of U.S. tart cherry production is destined for processing (e.g., frozen, canned pie filling, juice, dried). CIAB[1] reports raw-product equivalent carry-in inventory volume for each marketing year (July–June). For 2025/26 MY, carry-in volume was 87.2 million pounds, 5.9 million pounds lower than 2024/25 MY. If the smaller CIAB 2025/26 crop estimate and carry-in is realized, total available supply (production plus carry-in volume) will be 27 percent lower than last season. For the 2024/25 MY, CIAB recommended restricting 19 percent of domestic crop volume grown in the seven States regulated under the Federal marketing order. USDA has implemented the Board's recommendation to restrict a portion of the crop volume in 7 of the last 9 years. The preliminary June 2025 CIAB recommendation was for no restriction on the production volume for the

[1] 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.

2025/26 crop. CIAB will vote again on whether to recommend volume control restrictions to manage supply later this fall.

Cold storage stocks: At the end of May 2025, USDA, NASS reported frozen ripe tart pitted cherry volume in cold storage was 13 percent higher than the same month last season but 37 percent lower than 2 years ago (figure 6). The majority of frozen ripe tart pitted tart cherries in May 2025 was stored in the East North Central region (77 percent) and the Pacific region (20 percent) of the United States. Both frozen tart cherry juice and tart cherry juice concentrate were lower year over year compared to the same period. After declining throughout 2024/25, frozen tart cherry juice stocks fell to a 3-year monthly low in May 2025.

Figure 6
U.S. frozen tart cherry stocks in cold storage, 2022/23–2024/25



Note: Tart cherry marketing year begins in July and ends in June of the following year.
Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, *Cold Storage*.

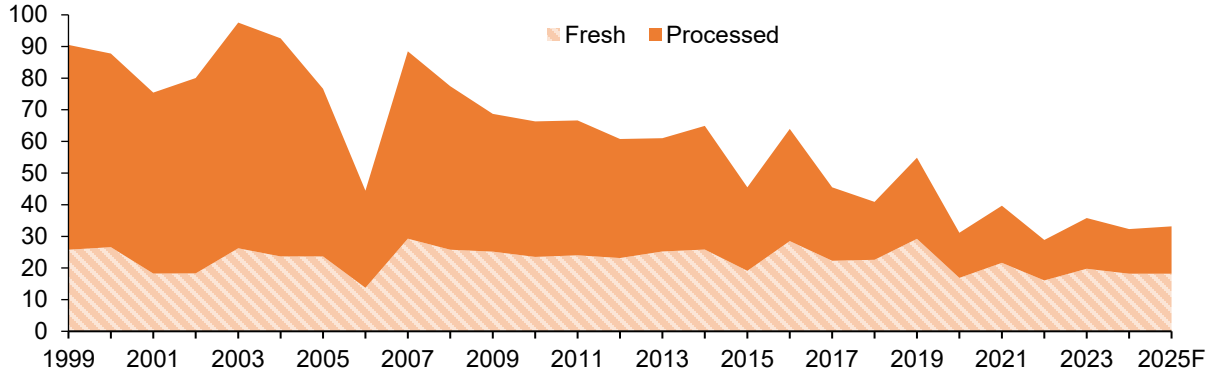
2025 Apricot Production Forecast Down

The USDA, NASS forecast 2025 U.S. apricot production at 30,700 tons, down 10 percent from last year. If realized, the 2025 apricot production will be the second smallest on record behind 2022. California, the primary apricot producing State, is expected to account for 28,000 tons (91 percent) of the total U.S. crop. The California crop forecast is 16 percent lower (5,400 tons) than last season, which more than offsets a 200-percent year-over-year increase in Washington. Last year, poor weather during bloom negatively impacted Washington's apricot yield. About 55 percent of the U.S. apricot crop is expected to go to the fresh market if the share of production utilized as fresh and processed is similar to the last 7 years (figure 7). The volume and share of apricot production going to processing has trended lower for decades, but the share of production going to the processed market has stabilized at 45 percent between 2018 and 2024.

Figure 7

U.S. apricot production utilization shares stablized in past seven seasons

Thousand tons



F = Forecast.

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

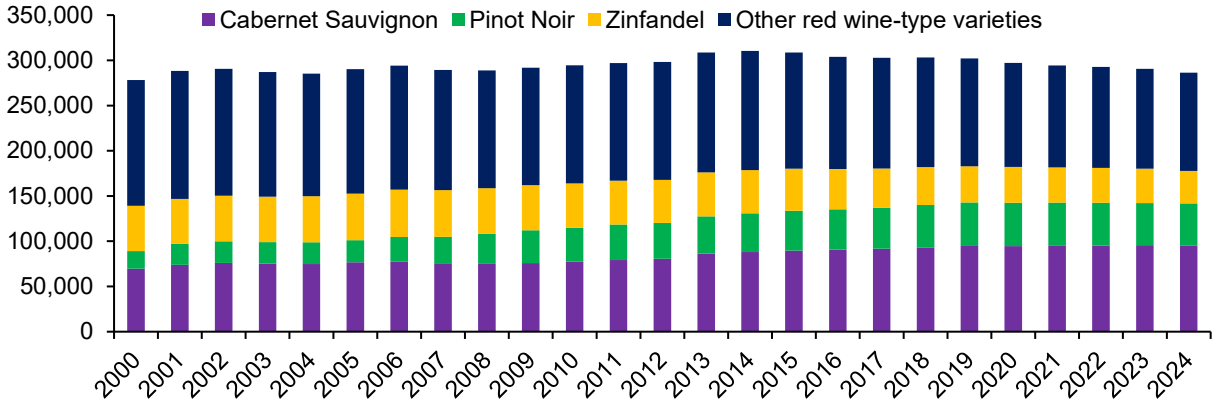
California Grape Bearing Acreage Was Down in 2024

California wine-type and table-type grape acreage decreased in 2024: California is the leading grape-producing State in the United States. About 70 percent of California's grape acreage is classified as wine-type grape varieties. Total wine-type grape acreage decreased to 590,000 acres in 2024, a 20,000-acre or 3.3-percent decline year over year, according to the USDA, NASS *California Grape Acreage Report, 2024 Crop* released in April 2025. Almost all acreage (550,000 acres or 93 percent) was bearing age, an age it can normally be expected to produce a commercially significant quantity of grapes. California wine-type grape bearing acreage in 2024 was 40,000 acres, or 7 percent, below the record high of 590,000 acres set in 2018–19.

In 2024, an estimated 64 percent of California's wine-type grape acreage was in red varieties, and the remaining 36 percent was in white varieties. Red wine-type grape varieties make up a larger share of wine-type grape acreage grown in California than at the turn of the century (about 59 percent of reported acreage from 2000–02). The leading red wine-type varieties by acreage were Cabernet Sauvignon, Pinot Noir, and Zinfandel, making up more than 60 percent of California's red wine-type acreage (figure 8). Reported acreage in Cabernet Sauvignon has increased about 30 percent since the turn of the century, while the acreage in Pinot Noir has more than doubled. About 25 percent fewer acres in the Zinfandel variety were reported than from 2000–02.

Figure 8

Three varieties make up over 60 percent of California's red wine-type grape acreage in 2024

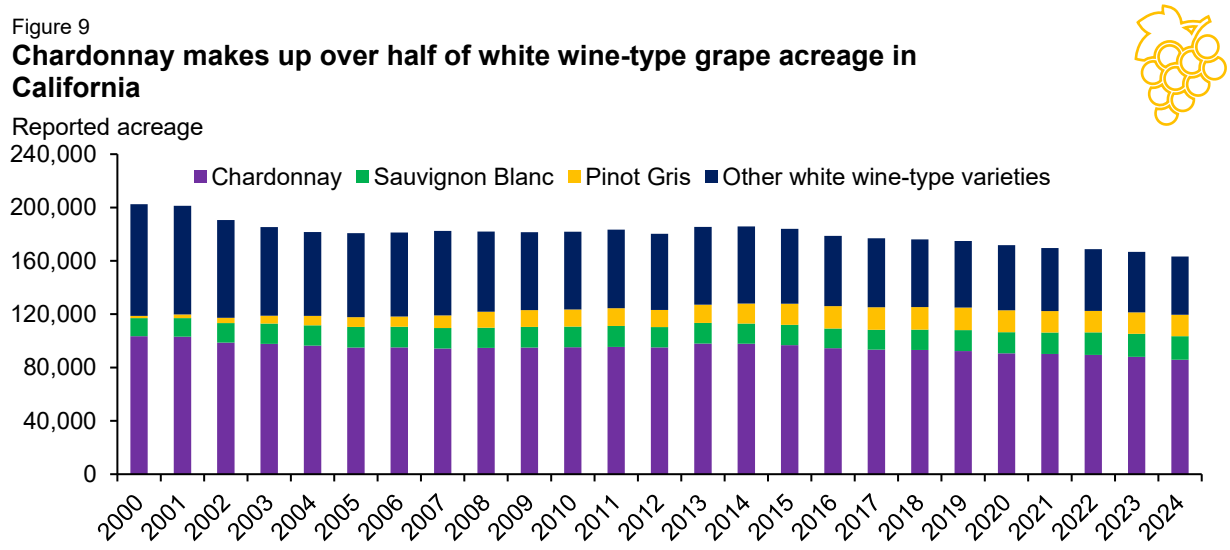


Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service and California Department of Food and Agriculture, *California Grape Acreage Report*.

The leading white wine-type grape varieties grown in California by acreage were Chardonnay, Sauvignon Blanc, and Pinot Gris—with Chardonnay alone accounting for more than half of white wine-type grape acreage in 2024 (figure 9). Reported acreage in Chardonnay has decreased by about 14 percent since 2000–02, while acreage has increased in Sauvignon Blanc and Pinot Gris. Pinot Gris has experienced the most growth, with 5.5 times more acreage than in the early 2000s.

Figure 9

Chardonnay makes up over half of white wine-type grape acreage in California



Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service and California Department of Food and Agriculture, *California Grape Acreage Report*.

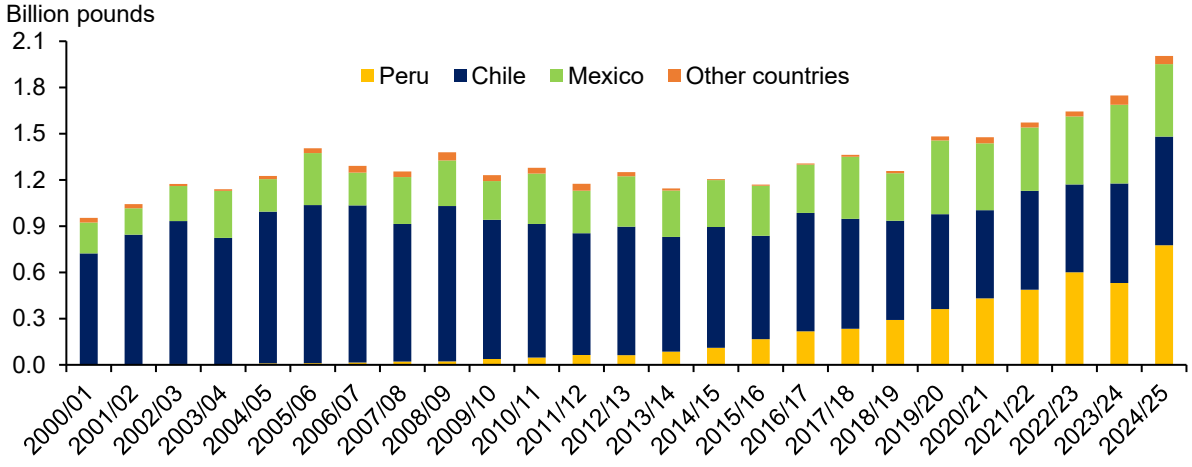
Table-type grapes are grown on about 15 percent of California's grape acreage. Total table-type grape acreage decreased to 120,000 acres in 2024, a 5,000-acre or 4-percent decline year over year. Almost all acreage (115,000 acres or 96 percent) was bearing age. Flame Seedless (an

early-season red seedless variety) was the leading table-type grape variety by acreage, followed by Autumn King (a mid-season red seedless variety) and Scarlet Royal (a late-season white seedless variety). These three top table-type grape varieties made up an estimated 28 percent of California's table grape acreage in 2024.

Fresh grape imports and exports increased in 2024/25: The 2024/25 fresh grape marketing year started in May 2024 and ended in April 2025. Fresh grape export volume was 23 percent higher year over year in 2024/25 at 496.5 million pounds, with the California table grape crop rebounding after the remnants of Hurricane Hilary negatively impacted the 2023/24 season. Fresh grape exports have trended downward since peaking in 2013/14. In 2024/25, of the domestically produced fresh grapes for export, two-thirds were destined for either Canada or Mexico, up from just under 40 percent a decade earlier as exports to other countries have declined. About 8 percent of exported grapes were certified organic.

Fresh grape import volume in 2024/25 was 15 percent higher year over year at 2.004 billion pounds, surpassing 2 billion pounds for the first time. New import volume records for fresh grapes have been set and subsequently broken each marketing year since 2021/22. About 97 percent of fresh grapes were imported from three countries in 2024/25: Peru, Chile, and Mexico (figure 10).

Figure 10
Fresh grape imports reached record highs in 2024/25



Note: The fresh grape season starts in May of the first year and ends the following April.
Source; USDA, Economic Research Service based on data from U.S. Department of Commerce, Bureau of the Census.

Fresh grape volumes from Peru and Chile (the top two exporters of fresh grapes to the United States) increased year over year, despite declining acreage in Chile. Table grape production in Chile has been faced with tight margins, due in part to export competition from neighboring Peru putting downward pressure on prices. Peru's table grape production rebounded in 2024/25 after heavy rains and high temperatures negatively affected yields in 2023/24, resulting in import

volumes increasing 46 percent year over year to record high volumes. Fresh grape imports from Mexico declined 9 percent year over year in 2024/25. More than 80 percent of Mexico's fresh grape production is located in Sonora, an arid desert State located on Mexico's northern border, south of Arizona. About 90 percent of Sonora's crop is exported to the United States.

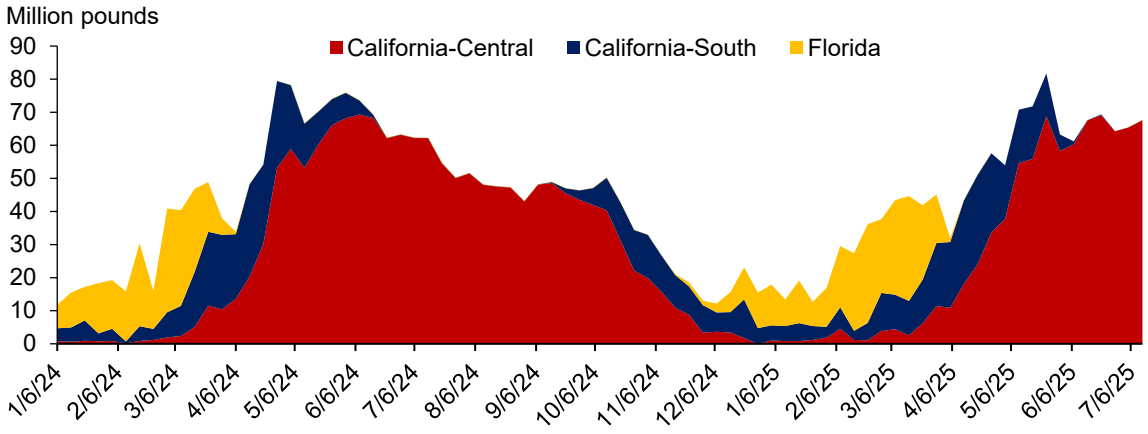
2025/26 domestic table grape season: USDA, NASS 2025 grape production forecast will be released in August 2025. Until then, USDA, AMS movement data indicated that summer volumes from California were lower year to date through mid-July, despite starting a week earlier than last year. The table grape shipments began in Southern California's Coachella Valley starting in mid-May and in the San Joaquin Valley in July. Industry reports indicate that early season conditions have been good in the Coachella Valley and San Joaquin Valley.

Strawberry and Blueberry Production Set Records in 2024

U.S. strawberry production reaches record highs in 2024: In 2024, strawberry utilized production in the United States was estimated to be 3.22 billion pounds, the highest on record and a 12-percent increase from 2.87 billion pounds in 2023. Production increased in California and Florida, with record high harvested acres in both States. California accounted for 90 percent of domestic strawberry production in 2024. About 2.62 billion pounds (or just over 80 percent) of domestic production was for the fresh market, with the remaining 604 million pounds for the processing market. Grower prices for fresh-market strawberries increased less than 1 percent year over year to $1.43 per pound in 2024. Grower prices for processing strawberries fell 6 percent to 41.3 cents per pound.

2025 domestic strawberry season: Domestically grown strawberries are available year-round, with Florida being the main supplier during the winter months and shipments from California peaking in summer (figure 11). Through mid-July 2025, USDA, AMS movement data indicate that domestic strawberry shipments were lower than the same period a year before but above 2023 levels. Early season strawberry shipments from Florida were higher year over year. Shipments from Central and Southern California were lower year to date, with around half of the season's volume typically accounted for by early July. Industry reports good quality strawberries in the Santa Maria and the Watsonville/Salinas areas due to favorable weather conditions.

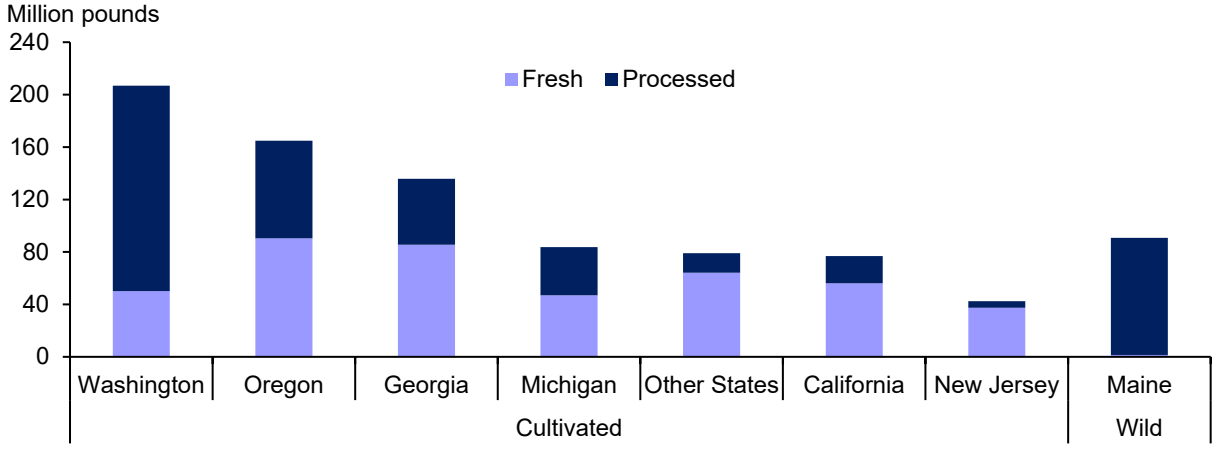
Figure 11
California fresh strawberry shipments peak in the summer



Note: Domestic shipments from California and Florida only.
Source: USDA, Economic Research Service based on data from USDA, Agricultural Marketing Service, *Market News.*

U.S. blueberry production reaches record highs in 2024: In 2024, total blueberry utilized production (cultivated and wild) in the United States was estimated to be 880.3 million pounds, a 21-percent increase from 725.7 million pounds in 2023. Cultivated blueberries made up 90 percent, or 789.5 million pounds, of domestic production. About 55 percent of domestically grown cultivated blueberries were destined for the fresh market (figure 12). The top three blueberry producing States are Washington, Oregon, and Georgia, cumulatively accounting for almost two-thirds of cultivated blueberry production. Wild blueberries grown in Maine made up 10 percent of total production, or 90.8 million pounds. Almost all domestically grown wild blueberries were destined for processing, primarily for freezing (figure 12).

Figure 12
Most cultivated blueberries were destined for fresh market in 2024 while almost all wild blueberries were destined for the processed market



Note: Other States include Florida and North Carolina.
Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service.

2025 domestic blueberry season: More than 90 percent of domestic blueberry shipments occur between April and August, with peak volumes typical in July. Through mid-July 2025, USDA, AMS movement data indicate that domestic fresh blueberry shipments were lower than the same period last year. Blueberry shipments from Georgia and Florida were lower year over year. Industry reports indicate that weather events in the southeastern United States negatively impacted this year's blueberry harvest in the region. Cooler weather and rain delayed initial harvest.

In California, blueberry production in the Oxnard area of Southern California began in February, with peak volumes from mid-March through early April. In California's Central Valley, peak production occurred in May and lasted through mid-June. The Pacific Northwest (PNW) blueberry season began in June, with fresh shipments lower in Oregon and Washington through mid-July. Industry reports indicate excellent quality to start off the PNW blueberry season. Good weather conditions aided spring pollination.

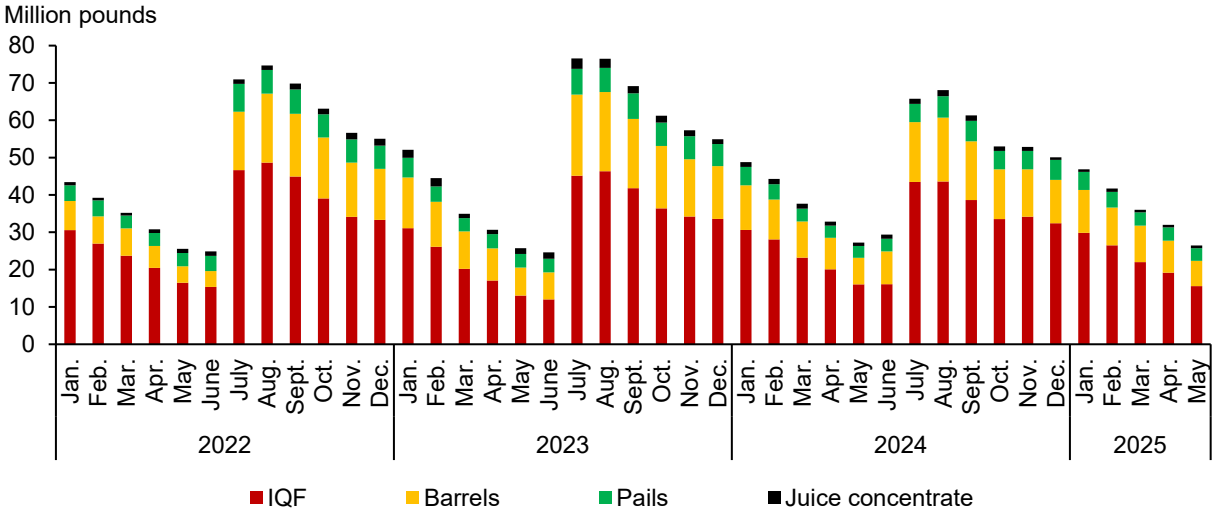
Raspberries: In 2024, raspberry utilized production in the United States was estimated to be 180.6 million pounds. Most commercial raspberry production in the United States is located on the West Coast. California is the top producing raspberry State, accounting for 102.1 million pounds or about 57 percent of domestic production in 2024. About 96.1 million pounds, or 53 percent of domestically produced raspberries were for the fresh market in 2024, with the remaining 84.5 million pounds for the processing market. Season-average grower prices for fresh-market raspberries were $4.13 per pound in 2024, while raspberries for processing received $0.93 per pound—both lower year over year.

2025 domestic raspberry season: Around 85 percent of fresh domestic raspberry shipments occur between May and October, with peak volumes typically in June and July. Through mid-July 2025, USDA, AMS movement data indicate that domestic raspberry shipments were higher than the same period last year, with larger shipment volumes out of Southern California year to date. California raspberries are shipped year-round, but shipments are highest from June to September. Industry reports indicate good berry quality in California so far this season.

Raspberries held in cold storage typically peak in July and August, as the summer harvest ramps up (figure 13). Just under two-thirds of processed raspberries in cold storage are individually quick frozen (IQF). Non-IQF processed raspberries are considered lower value in frozen bulk form (barrels and pails) and juice concentrate compared to IQF.

Figure 13

Red raspberry cold storage holdings peak in late summer



Note: IQF stands for individually quick frozen. This figure excludes small quantities of frozen black raspberries.
Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service.

Tropical Fruit Imports Are Mixed in Early 2025

Fresh banana import volume in 2024 was the highest since 2018: Bananas have the highest per capita availability of any fresh fruit in the United States. In 2024, total fresh banana imports[2] to the United States increased to 9.2 billion pounds, up 2 percent from 2023 and the highest volume since 2018. Higher imports pushed fresh banana per capita availability upward to a preliminary estimate of 26.8 pounds per person in 2024.

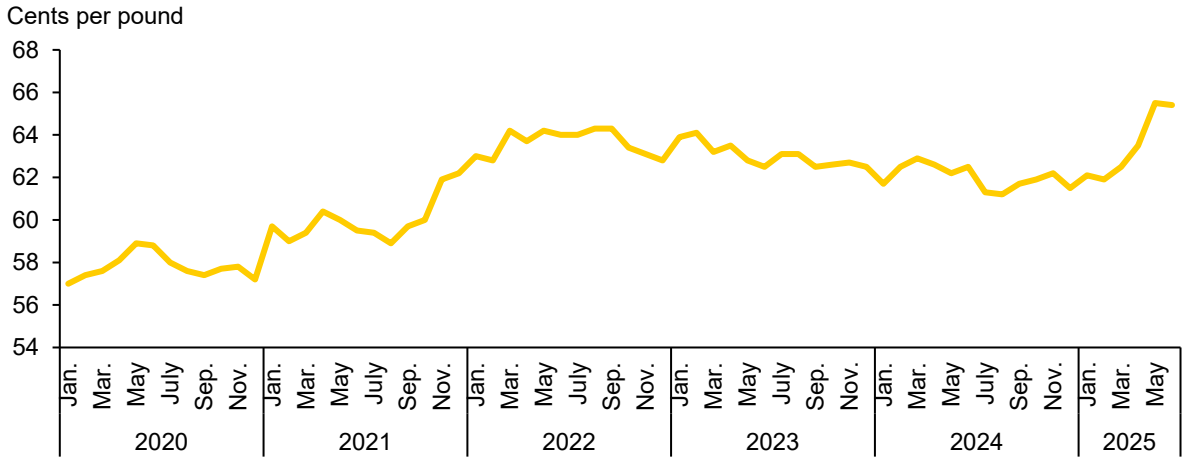
In 2024, 85 percent of fresh banana import volume to the United States originated in four countries: Guatemala (41 percent), Ecuador (19 percent), Costa Rica (16 percent), and Honduras (9 percent). Supplies of conventional bananas were unchanged, while certified organic banana imports increased 15 percent year over year to 1.4 billion pounds, the highest volume on record. About 13 percent of fresh bananas entering the United States were certified organic, and most came from Ecuador (58 percent). Organic bananas make up an increasing share of fresh bananas imported to the United States, up from about 7 percent a decade ago.

Banana shipments were lower in early 2025: Bananas are shipped to the United States year-round, with volume typically ranging between 800 million pounds and 900 million pounds each month. In the first 5 months of 2025, fresh banana imports were 2 percent lower by volume and 1 percent higher by value than in the same period in 2024. Conventional fresh banana volume was 4 percent lower year to date, while organic fresh banana volume was 15 percent higher. Average national-level retail prices for bananas rose in the second quarter of 2025 (April–June),

[2] Total fresh banana imports are imports minus re-exports.

reaching a high of 65.5 cents per pound in May 2025 and averaging 4 percent above the second quarter of 2024 (figure 14). Banana supplies were lower in early 2025, with cooler weather conditions in Central America due to La Niña weather patterns.

Figure 14
Banana retail prices higher in early 2025

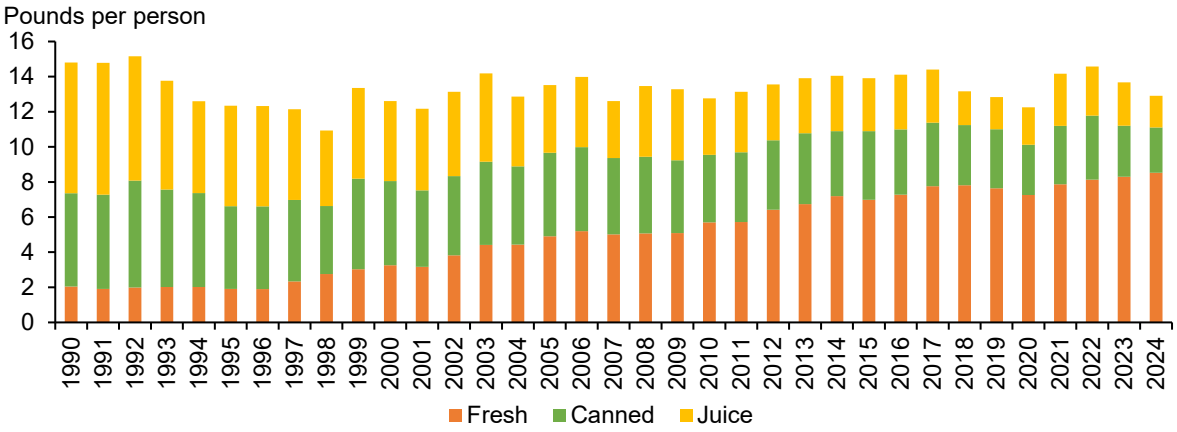


Source: USDA, Economic Research Service based on data from U.S. Bureau of Labor Statistics.

Fresh pineapple import volume was the highest on record in 2024: The United States has been the top global importer of fresh pineapples by volume each year since 1997, according to data from the Food and Agriculture Organization of the United Nations (FAO). In 2024, fresh pineapple imports to the United States increased 4 percent to 2.92 billion pounds, surpassing the previous 2023 record of 2.81 billion pounds. Costa Rica is the leading supplier of fresh pineapples to the United States, accounting for almost 90 percent of import volume, valued at $760 million in 2024. Costa Rica is the third largest producer of pineapples worldwide, behind Indonesia and the Philippines.

Total fresh-weight per capita availability for pineapples, including fresh and canned pineapples and pineapple juice, was 12.9 pounds per person in 2024. Between 1995 and 1997, pineapple availability averaged 12.3 pounds per person, with fresh accounting for less than 20 percent. In the last 30 years, the fresh share of pineapple availability has steadily increased, reflecting both increased demand for fresh pineapple imports and declining demand for canned pineapple and pineapple juice (figure 15). Record import volume pushed fresh pineapple per capita availability upward to a high of 8.5 pounds per person in 2024.

Figure 15
Pineapple availability has shifted from processed to fresh

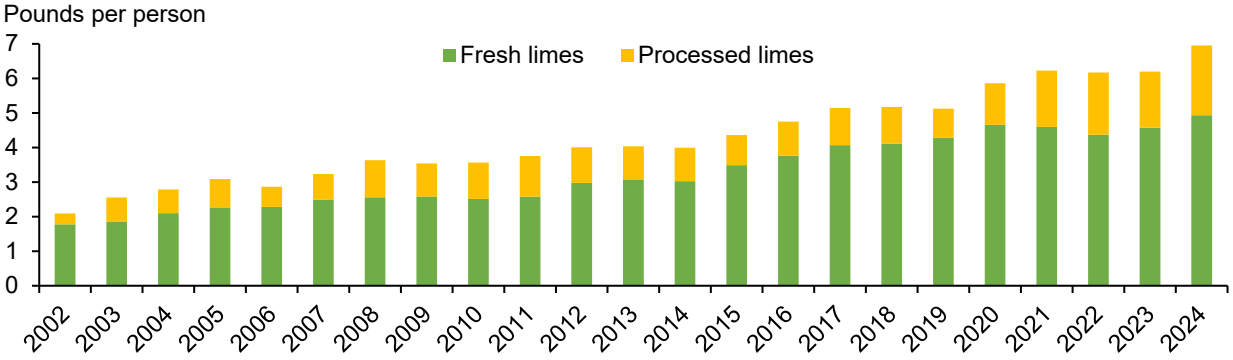


Note: Per capita availability in pounds per person on a fresh-weight basis.
Source: USDA, Economic Research Service calculations based on data from USDA, National Agricultural Statistics Service and U.S. Department of Commerce, Bureau of the Census.

Pineapple shipments were lower in early 2025: Pineapples are imported year-round, but volume typically peaks in May. In the first 5 months of 2025, the import volume of fresh pineapples was 1 percent lower than the same period in 2024, with volumes from Costa Rica down 3 percent year to date due to adverse weather in early 2025.

Fresh lime import volume reached record highs in 2024: In 2024, fresh lime imports to the United States increased to 1.70 billion pounds, up 9 percent year over year and surpassing the previous 2020 record high of 1.56 billion pounds. Record import volumes pushed fresh lime per capita availability upward to 4.9 pounds per person in 2024, reflecting the increasing demand for limes in the United States (figure 16). On a fresh-weight basis, almost 7 pounds of limes were available per person in 2024, the highest on record. Of the fresh limes imported to the United States in 2024, about 91 percent were classified as Tahitian limes, Persian limes, or other limes of the *citrus Latifolia* variety, and the remaining 9 percent were Key limes (*citrus Aurantifolia*).

Figure 16
Lime availability has increased since the turn of the century



Note: Per capita availability in pounds per person on a fresh-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.

Mexico is the top supplier of fresh limes to the United States, accounting for about 86 percent of import volume in 2024. Michoacán and Veracruz are major lime producing States in Mexico, accounting for more than half of Mexico's total lime production. Just over half of limes grown in Mexico are Persian limes, and more than 40 percent are Key limes (a sour lime variety also referred to as Mexican limes). Historically, Mexico supplied almost all (more than 95 percent) of the fresh limes imported to the United States. Since 2022, fresh limes from Colombia have made up an increasing share of import volume (11 percent in 2024). As demand for fresh limes has increased in the United States, supplies from Colombia have filled in seasonal supply fluctuations from Mexico, particularly during the first few months of the year.

Lime imports were higher in early 2025: Fresh limes are imported year-round, but volume is typically highest in the summer months. In the first 5 months of 2025, the import volume of fresh limes was 7 percent higher than the same period in 2024, with increased supplies of Persian limes (*citrus Latifolia)* from Mexico.

Fresh mango imports declined for the second year in a row in 2024: The United States has been the top global importer of fresh mangoes (including guavas and mangosteens) by volume each year since 1975 (FAO). In 2024, fresh mango imports decreased 2 percent year over year to 1.2 billion pounds, down 6 percent from 2022's record high and the lowest volume since 2019. Lower import volumes pushed fresh mango per capita availability downward to 3.49 pounds per person in 2024. Though fresh mango import volume has decreased slightly since peaking at 1.27 billion pounds in 2022, it was 45 percent higher in 2024 than a decade before (827 million pounds in 2014).

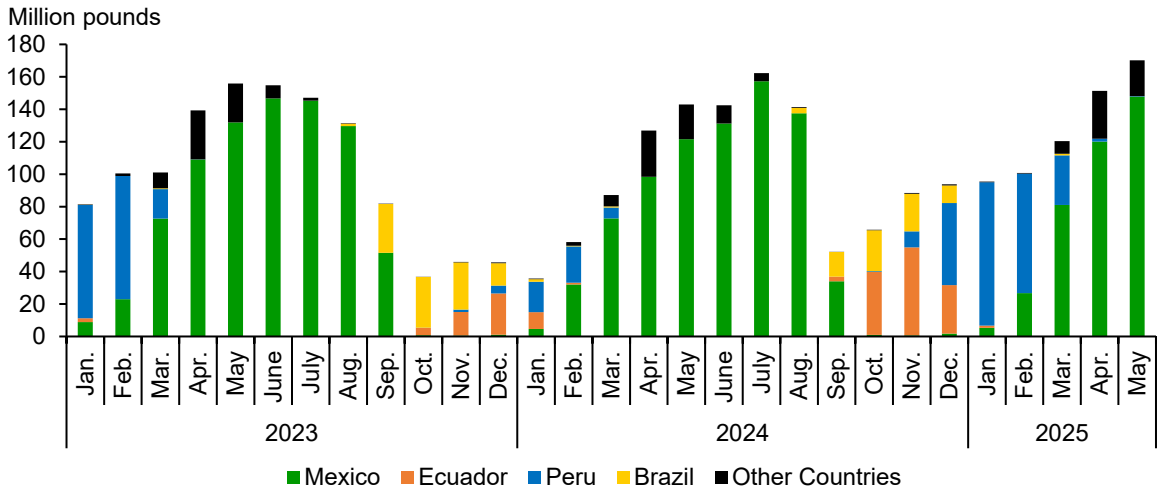
Mexico is the top supplier of fresh mangoes to the United States, accounting for about two-thirds of import volume in 2024. Fresh mango import volume from Mexico in 2024 decreased 3 percent year over year. Drought conditions in Mexico resulted in lower production and some reports of poor fruit quality. Ecuador surpassed Peru as the second largest U.S. supplier in 2024, after fresh mango imports from Peru decreased 36 percent year over year. Water shortages coupled with cool temperatures prompted an early harvest season, reportedly affecting both quantity and quality for mangoes in Peru.

Mango shipments were higher in early 2025: Mango import volume peaks in the summer between May and August, when mangoes are readily available from top supplier Mexico (figure 17). In the first 5 months of 2025, the import volume of fresh mangoes was 42 percent higher than the same period in 2024. Peru is a winter supplier of mangoes for the U.S. market. Year-to-date quantities of fresh mangoes from Peru were the highest on record, more than rebounding

from a difficult season in 2024. The National Mango Board estimates mango shipment volume to be higher this season, driven by higher shipments from top supplier Mexico, as the season continues through the end of September.

Figure 17

Fresh mango imports peak with summer shipments from Mexico



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

Fresh papaya import volume in 2024 fell 2 percent from 2023 record high: The United States has been the top global importer of fresh papayas by volume each year since 1995 (FAO). In 2024, fresh papaya imports to the United States decreased to 493 million pounds, down 2 percent from the 2023 record high of 501 million pounds. Lower import volumes pushed fresh papaya per capita availability downward slightly to 1.46 pounds per person in 2024.

Mexico is the leading supplier of fresh papaya imports to the United States, accounting for almost 90 percent of import volume in 2024. Papayas are grown throughout Mexico, but the top three papaya-producing States in Mexico (Oaxaca, Colima, and Chiapas) are located in tropical or subtropical regions within the southern half of the country.

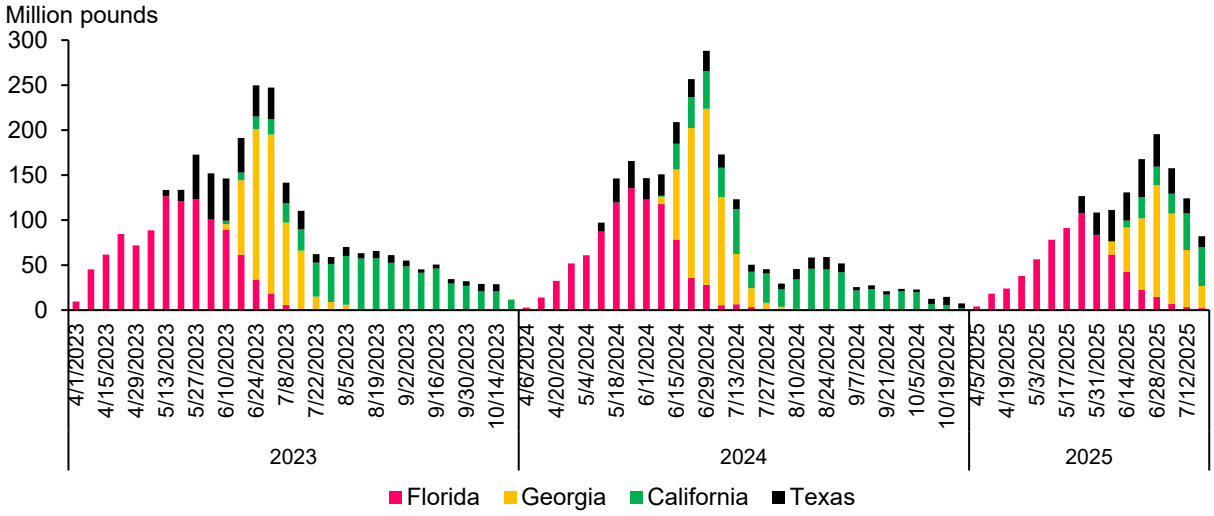
Fresh papaya import volume was higher year over year in early 2025: Papayas are shipped to the United States year-round, though volume is typically highest heading into the summer months. In the first 5 months of 2025, the import volume of fresh papayas was 13 percent higher than the same period in 2024. Year-to-date shipments from Mexico were 15 percent higher year over year. Mexico has doubled its papaya production in the last two decades, and most of the country's papaya exports are destined for the United States.

Melons Outlook

Year-to-date watermelon imports were higher than a year ago: Watermelons are imported to the United States year-round, but volumes typically peak in the spring and fall (at the beginning and end of the summer domestic watermelon season). In the first 5 months of 2025, watermelon import volume was 9 percent higher than during the same period in 2024. Volume from top supplier, Mexico, was 6 percent higher, with higher volumes of seedless miniature watermelons in the first quarter and seeded watermelons through May 2025. Winter imports from Guatemala, the second largest supplier, were also higher year over year.

2025 domestic watermelon season update: Domestic watermelon shipments are typically available from April to October, with peak shipments in June or July. Through mid-July 2025, AMS movement data indicate that domestic watermelon shipments were lower than the same period in 2024 (figure 18). Shipments from major watermelon producing States in the Southeast, Florida and Georgia, were lower year to date due to cooler weather and spring rains during the growing season. Shipments from Texas and California's Imperial Valley were higher year to date. Texas watermelon growers reported good yields and high quality this season. Most domestic watermelon shipments (more than 90 percent) are seedless watermelons.

Figure 18
Domestic watermelon shipments peak in summer



Note: Shipment data include top 4 watermelon-producing States from April through October.
Source: USDA, Economic Research Service based on data from USDA, Agricultural Marketing Service.

Year-to-date cantaloupe imports were lower than a year ago: Most imported fresh cantaloupes enter the United States in the winter or spring months. In the first 5 months of 2025, cantaloupe import volume was 4 percent lower than the same period in 2024. Volume from top supplier, Guatemala, increased 10 percent. Monthly shipments were higher year over year from

March to May, despite reports of damage to melon fields in Central America due to flooding from Tropical Storm Sara in late autumn 2024.

2025 domestic cantaloupe season update: Shipments of domestically grown cantaloupes typically begin in Florida in April and progress to Arizona, Georgia, and Southern California's Imperial Valley in May, before moving northward to Central California in June. Domestic shipments typically peak in June or July. Through mid-July 2025, USDA, AMS movement data indicate that domestic cantaloupe shipments were lower than the same period in 2024. Year-to-date shipments from top cantaloupe-producing State, California, were lower than the same period last year, while shipments were higher from Arizona, the second largest domestic producing State. Industry reports indicate good quality, as the cantaloupe harvest began in the San Joaquin Valley in early July.

Year-to-date honeydew melon imports were lower than a year ago: Most imported fresh honeydew melons enter the United States in the winter or spring months. In the first 5 months of 2025, honeydew import volume was 8 percent lower than the same period in 2024. Almost all fresh honeydew melons imported to the United States are supplied by three countries: Guatemala, Mexico, and Honduras. Volume from top supplier, Guatemala, was 8 percent lower, while volume from Honduras fell 16 percent year to date. Tropical Storm Sara caused severe flooding and damaged melon fields in Central America in November 2024.

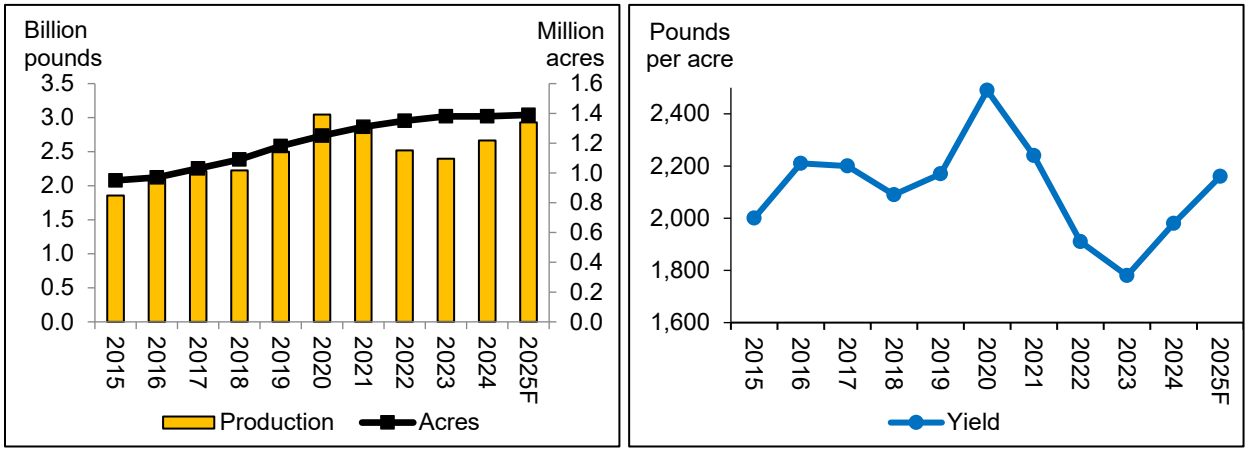
2025 domestic honeydew season update: Shipments of domestically grown honeydew melons typically begin in Arizona and Southern California's Imperial Valley in May, moving northward to the major producing region of Central California's San Joaquin Valley in July. Domestic shipments typically peak in August. Through mid-July 2025, USDA, AMS movement data indicate that domestic honeydew shipments were higher than the same period in 2024. Year-to-date honeydew shipments from Arizona and California's Imperial Valley were higher than the same period last year. Industry reports indicate good quality, as the honeydew season began in the San Joaquin Valley in early July.

Tree Nuts Outlook

Almonds Are Set for a Large Crop in 2025

The USDA, NASS *2025 California Almond Objective Measurement Report* predicts that approximately 3.0 billion pounds of almonds will be produced in 2025. If so, the 2025 crop would be the second largest on record, smaller only than the 3.1 billion pounds produced in 2020. The NASS report forecasts that almond yields will be approximately 2,160 pounds per acre in 2025, 7 percent higher than the estimate NASS released in May (in the *2025 California Almond Forecast*), but not statistically different from the 10-year average (2,123 pounds per acre) (figure 19).

Figure 19
Above average yields increase almond production in 2025



F=Forecast.
Note: Production and yields are shelled equivalents. Acres are bearing acres, which reflect plantings that are four years or older.
Source: USDA, Economic Research Service using data from the USDA, National Agricultural Statistics Service.

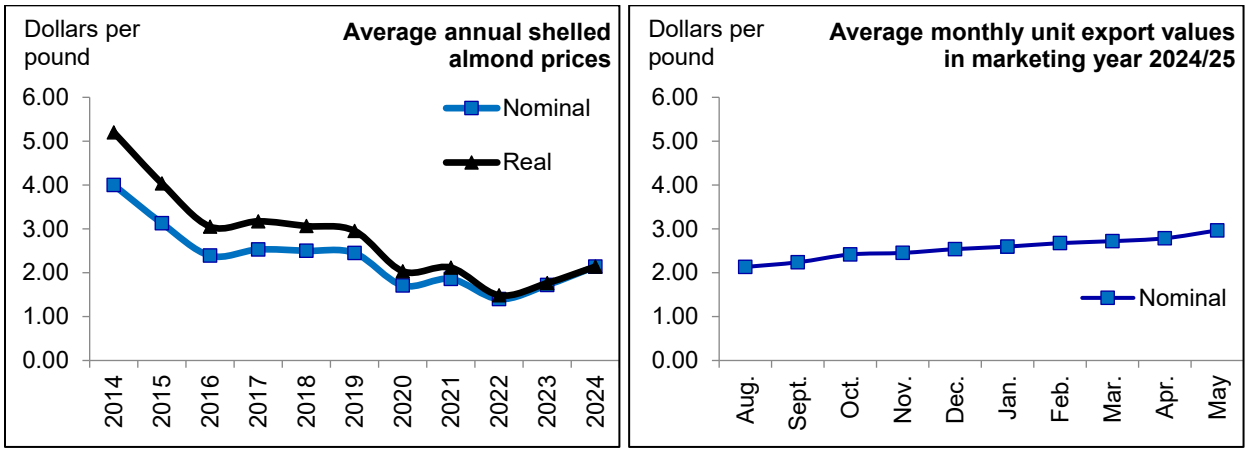
If realized, NASS's current yield forecast would be greater than the 1,910 pounds per acre recorded in 2022 (when California was in a prolonged and severe drought), the 1,780 pounds per acre recorded in 2023 (when almond pollination was disrupted by stormy weather), and the 1,980 pounds per acre recorded last year (when extreme heat pushed temperatures in some parts of the Central Valley as high as 118 degrees Fahrenheit).

In 2025, a mild spring in California and timely rain supported nut growth and bolstered yields, despite variable weather during almond bloom and pollination, concerns about lack of access to pollination services (following large losses to honeybee colonies over the winter of 2024/25), and lingering impacts from the extreme heat experienced in July 2024. NASS reports that pest and disease pressure have been lower than normal this season. Almond harvest is expected to begin on time, in August.

After growing at an average rate of 4.6 percent per year from 2000 to 2021, growth in almond bearing acreage has slowed since 2022. In 2025, NASS projects that almond acreage will increase by 10,000 acres, less than 1 percent from acreage in 2024 (figure 19). Though 10,000 acres per year is less than the average 10-year growth rate (44,000 acres per year), almond acreage did not increase last year. In fact, 2024 was the first year since 1995 that almond acreage did not rise.

The break-even price for almonds (i.e. the price at which producers cover their costs) depends on growers' input use decisions, input prices, and yields. A 2024 cost-and-return study conducted by the University of California, Davis Department of Agricultural and Resource Economics suggests that almond growers producing 2,200 pounds per acre can earn enough revenue to cover their operating costs, when almond prices are around $2.00 per pound. In 2024, shelled almond prices rose to $2.14 per pound (figure 20). For many producers, 2024 was the first time since the record-breaking crop of 2020 that average almond prices rose above a break-even level.

Figure 20
Nominal and inflation-adjusted shelled almond prices rose in 2023 and 2024



Note: The Consumer Price Index for all Urban Consumers has been rescaled such that the base year is 2024.
Source: USDA, Economic Research Service using data from the USDA, National Agricultural Statistics Service, the U.S. Department of Labor, Bureau of Labor Statistics, chain-type price index, 2012=100, monthly, not seasonally adjusted, and the U.S. Department of Commerce, Bureau of the Census.

Trade data published by the U.S. Department of Commerce, Bureau of the Census show that almond prices have continued to rise during the 2024/25 marketing year (August–July). In August 2024, the average unit value (value of exports divided by volume of exports) for a pound of exported shelled almonds was $2.13 per pound. As of May 2025, the unit value of a pound of exported shelled almonds was $2.97 per pound, about 39 percent more than at the start of the marketing year.

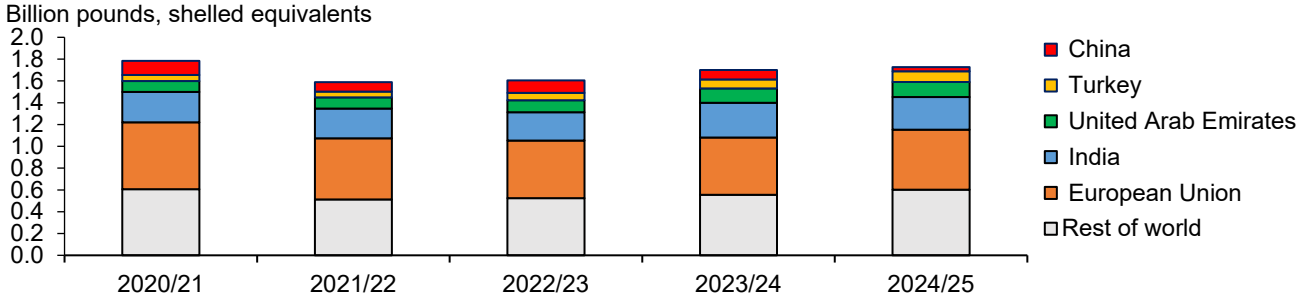
In part, increases in almond prices are due to the relatively small amount of inventory carried into the 2024/25 season. In 2024/25, there were approximately 500 million pounds of carry-in, a decrease of approximately 300 million pounds (about 37 percent) from the 800 million pounds carried into 2023/24. In 2024, 300 million pounds was 10 percent of total supply (which is calculated by adding production, imports, and beginning stocks). The supply of almonds decreased by 1 percent in 2024/25, falling from 3.215 billion pounds to 3.183 billion pounds. The 3 billion pound estimate reported by USDA, NASS in the *2025 California Almond Objective Measurement Report* has put downward pressure on almond prices in recent weeks. The realized size of the crop will dictate prices in 2025/26.

The California Almond Board will report carry-in for the 2025/26 marketing year this September, when the Board publishes its position report for August 2025. At the start of the 2024/25 marketing year, the Almond Board had forecast that 550 million pounds of inventory would be carried into 2025/26, 50 million pounds more than in 2024/25.

The USDA, FAS *Tree Nuts: World Markets and Trade* report published in October 2024 forecast that almond exports would rise by 2.4 percent in 2024/25 to 2.04 billion pounds. If current and historical trends persist, that forecast will be accurate. Ten months into the 2024/25 marketing year (August 2024–May 2025) almond exports were 1.727 billion pounds, 1.6 percent higher than in 2023/24 and 2.7 percent higher than the 5-year average (figure 21). As of May 2025, approximately 68 percent of almond exports by volume (on a shelled basis) had been shipped to the European Union (32 percent), India (17 percent), the United Arab Emirates (8 percent), Turkey (6 percent), and Japan (5 percent). Growth in almond exports in 2024/25 is expected to stem from increases in shipments to the European Union, Turkey, and countries that rank outside of the United States' traditional top five trade partners. China (which was the 5th largest U.S. export destination in 2023/24) is expected to fall to the 10th ranked U.S. almond export partner in 2024/25, following a 56-percent reduction in U.S. almond exports to China (August 2024–May 2025).

Figure 21

U.S. almond exports were 1.6 percent higher from August through May in 2024/25 than in 2023/24



Note: This figure depicts the first 10 months of the August–July marketing year, from August through May.
Source: USDA, Economic Research Service using data from the U.S. Department of Commerce, Bureau of the Census.

Suggested Citation

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