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Report Name: Fresh Deciduous Fruit Annual

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Prepared By: Eduardo Lozano

Approved By: Jasmine Osinski

Report Highlights:

In terms of total volume, Mexico's marketing year (MY) 2025/26 total deciduous fruit production is forecast to remain more or less stable, with a small decline in table grape production mostly offset by a moderate 3 percent growth in apple production. Apple consumption is also forecast to grow slightly in line with slightly higher production. Pear consumption is projected to grow by less than one percent, while grape consumption is forecast to remain stable as inflation continues to dampen the purchasing power of Mexican households. With Mexico’s stable year-to-year domestic production, imports, largely from the United States, will fill the modest but steady growth in demand for apples and pears.

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

Apples

Mexico Apples, Fresh – Production, Supply, and Distribution

Apples, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Aug 2023		Aug 2024		Aug 2025	
Mexico	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	57243	57243	57300	57035	0	57325
Area Harvested (HA)	54551	54551	55200	54488	0	54500
Bearing Trees (1000 TREES)	0	0	0	0	0	0
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total Trees (1000 TREES)	0	0	0	0	0	0
Commercial Production (MT)	814533	814533	815000	779723	0	805000
Non-Comm. Production (MT)	2000	2000	2000	2000	0	2000
Production (MT)	816533	816533	817000	781723	0	807000
Imports (MT)	345000	288176	300000	294484	0	305000
Total Supply (MT)	1161533	1104709	1117000	1076207	0	1112000
Domestic Consumption (MT)	1161033	1104206	1116500	1075359	0	1111300
Exports (MT)	500	503	500	848	0	700
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	1161533	1104709	1117000	1076207	0	1112000
(HA) ,(1000 TREES) ,(MT)						

Area

Looking ahead to MY 2025/26 (August-July), Post forecasts apple planted area at 57,325 hectares (ha). The outlook is essentially stable since there is no evidence from large-scale apple growers from the state of Chihuahua of any increased area in the top-producing municipalities of Cuauhtemoc, Guerrero, and Namiquipa. However, extensive farmers in Chihuahua have shifted to high-density apple farming and technological intensification to reduce water consumption, increase productivity, and produce higher quality fruit. The second and third largest apple-producing states, Coahuila and Puebla, have seen no increase in apple production due to the lack of area expansion and investment in modern technology. Arteaga, Coahuila and Zacatlan, Puebla, the apple capitals of those states, are also affected by rising manufacturing sector employment which is increasingly attracting workers away from farms to factories in urban areas. MY 2025/26 harvested area is forecast at 54,500 ha, given the favorable conditions in Chihuahua.

Production

Post's total production forecast for MY 2025/26 is 807,000 metric tons (MT), up slightly from the 2024/25 production estimate of 781,723 MT. Post's projected production growth takes into consideration that over the last three marketing years (2022/23 - 2024/25), harvests remained relatively stable with a slight upward trend. The forecast is also moderated by current climate trends, including a general decline in the number of chill hours orchards receive during the season, a factor essential for fruit development and overall orchard health.

Apple Producing States in MY 24/25, Percent of Production

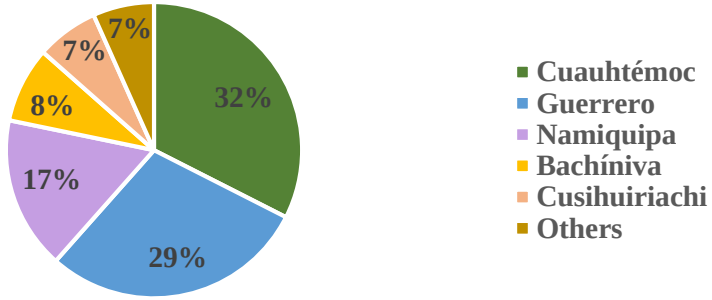
Source: SENASICA with Servicio de Informacion Agroalimentaria y Pesquera (SIAP) data[1]

The production estimate in MY 2024/25 of 781,723 MT is derived from currently available data from the Mexican Secretariat of Agriculture and Rural Development's (SADER)'s Agri-food and Fisheries Information Service (SIAP). The MY 2024/25 season saw a decline in production volume, with apples averaging smaller in size and showing variable quality due to irregular weather conditions during the growing period. In terms of volume, MY 2024/25 represents a moderate 4 percent decrease from the previous year, based upon available data. Growers anticipate that medium-term production will hold steady with 2024/25 figures.

The states of Chihuahua, Puebla, and Coahuila account for over 95 percent of Mexican apple production. Chihuahua by itself is estimated to produce about 85 percent of the country's total crop. With no growth in production in other states, Chihuahua will remain the benchmark for national apple production performance in Mexico. Compared with other producing states, the high elevation of Chihuahua's growing regions is one of the key factors behind the success of apple cultivation in the state. The main apple-producing regions of Chihuahua (Cuauhtémoc, Namiquipa, Guerrero, Cusihuiriachi, and Bachíniva) are situated in the Sierra Madre Occidental mountain range at elevations exceeding 6,000 feet, with some orchards located above 7,000 feet. These high altitudes provide periodic cooling essential for successful commercial apple production. Large producers in Chihuahua continue to invest in controlled-atmosphere and cold storage facilities to keep apples fresh after harvest and supply quality fruit year-round.

[1] Mexico's Secretariat of Agriculture and Rural Development's (SADER) National Service for Health, Food Safety, and Food Quality (SENASICA)

Chihuahua Apple Production Share by Municipality in MY 24/25



Source: Agri-food and Fisheries Information Service (SIAP)

Cuauhtemoc, Guerrero and Namiquipa are the top apple producing municipalities, accounting for an estimated 77.6 percent of Chihuahua's apple production and an estimated 66 percent of national production with 515,571 MT in 2024.

Consumption

MY 2025/26 apple consumption is forecast at about 1.11 million metric tons (MMT), a modest increase of 3 percent from 2024/25 driven by higher domestic production and imports, up 3.2 percent and 3.6 percent respectively. In general, higher supply levels and consistent consumer demand are expected to foster moderate growth of apple consumption in Mexico. As of this report, U.S. apple prices at retail stores in Mexico are more than 42 pesos per kilo higher than apples from Chihuahua, and with persistent food price inflation affecting many food staples in Mexico, it is difficult for the average household to consider apples as an essential part of their food basket. Post's consumption forecast considers the still-high retail price of apples, which continues to limit consumption growth, even though the fruit is included in the Mexican government's official "Canasta Básica" (basic food basket). This is reflected in the 2.7 percent cumulative inflation in Mexico from January to September 2025, according to Mexico's National Institute of Statistics and Geography's (INEGI) National Consumer Price Index (INPC). Although the INPC also indicates a 4.9 percent decrease in average prices for fruits and vegetables, overall inflationary pressure continues to undermine households' purchasing power to buy groceries.

Mexico's Agricultural Goods Cumulative Inflation Rate, 2025

Concepto	Variación porcentual					
	mensual			anual		
	2023	2024	2025	2023	2024	2025
INPC	**0.44**	**0.05**	**0.23**	**4.45**	**4.58**	**3.76**
Subyacente	**0.36**	**0.28**	**0.33**	**5.76**	**3.91**	**4.28**
Mercancías	0.31	0.21	0.34	6.20	2.92	4.19
Alimentos, bebidas y tabaco[2/]	0.27	0.06	0.24	7.57	3.92	5.34
Mercancías no alimenticias	0.35	0.33	0.42	4.59	1.69	3.21
Servicios	0.43	0.35	0.32	5.23	5.10	4.36
Vivienda[3/]	0.23	0.28	0.23	3.58	4.05	3.39
Educación (colegiaturas)	3.15	2.85	3.33	6.59	5.79	5.84
Otros servicios[4/]	0.04	0.08	0.00	6.32	6.07	5.11
No subyacente	**0.70**	**-0.72**	**-0.10**	**0.60**	**6.50**	**2.02**
Agropecuarios	0.84	-1.65	-0.14	3.25	6.76	2.76
Frutas y verduras	1.02	-3.43	-0.10	6.75	7.65	-4.86
Pecuarios	0.67	-0.26	-0.17	0.33	5.14	8.45
Energéticos y tarifas autorizadas por el gobierno	0.57	0.03	-0.06	-1.71	6.01	1.42
Energéticos	0.74	-0.19	-0.11	-4.61	6.92	0.36
Tarifas autorizadas por el gobierno	0.22	0.42	0.03	5.14	3.93	3.27

Source: Mexico's National Institute of Statistics and Geography's (INEGI)

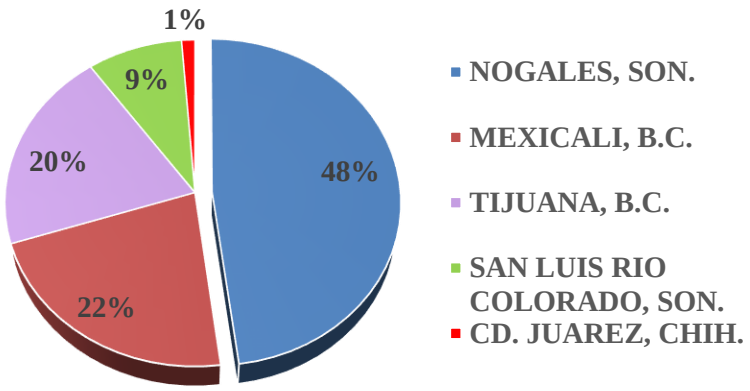
Price and palatability remain the main drivers for consumption of locally grown apples. In 2025, Mexico's Golden Delicious (about 56 percent of total production) and Red Delicious (around 30 percent) varieties continue to lead the market, with retail prices per kilo comparable to 2024 levels and 40 to 48 percent lower than imported U.S. apple varieties in general.

Trade

MY 2025/26 apple imports are forecast at 305,000 MT, up 3.5 percent from the previous season. However, increased local production, high retail prices, and inflation will temper growing demand for imported apples. Apple supply from the United States, available year-round to the Mexican consumer but at a higher price, will continue to complement domestic production. Higher-income consumers and the hospitality and foodservice sectors will continue to drive demand for imported apples, particularly for varieties such as Gala, Fuji, Honeycrisp, Envy, and Pink Lady sold in retail stores across Mexico.

For MY 2024/25, Post estimates exports of U.S. fresh apples to Mexico at 294,484 MT, based on available data. The United States is Mexico's principal year-round apple supplier with several advantages, including exportable supply, proximity, and established logistical advantages. Mexico is by far the largest export market for U.S. apples. In MY 2024/25, 35 percent of total U.S. apple exports went to Mexico, followed by 16 percent to Canada and 7.8 percent to Taiwan. Compared to the significant volume of fruit Mexico imports from the United States, its imports from Chile and South Africa are considerably smaller.

U.S. Apple Imports to Mexico, by Port of Entry 24/25



Source: Global Agricultural Trade System (GATS)

The main border entry points for U.S. apple exports into Mexico are Nogales and Mexicali with Tijuana, and San Luis Río Colorado also playing important roles. Together, these border crossings handle around 90 percent of all U.S. apple shipments to Mexico. Since most of the apples come from Washington State and other western regions of the United States, this trade route has long been firmly established.

Total Mexican apple exports for MY 2025/26 are forecast at 700 MT. Mexico's small quantity of apple exports goes mainly to El Salvador and Belize. Some producers in Chihuahua also process and then export value-added apple products to the United States and elsewhere.

Policy

Applicable workplans between USDA's Animal and Plant Health Inspection Service (APHIS) and Mexico's Secretariat of Agriculture and Rural Development's (SADER) National Service for Health, Food Safety, and Food Quality (SENASICA) contain phytosanitary regulations for the export of U.S. apples to Mexico from:

- California with methyl bromide as quarantine treatment
- The Center and Northeast of the United States
- The Northwest of the United States

For details on the above work plans please visit SENASICA's website.

Tariffs

Apples exported from the United States enter Mexico duty free under the United States–Mexico–Canada Agreement (USMCA). Under the Chile-Mexico Free Trade Agreement, imported Chilean apples began to enter Mexico duty free as of January 1, 2006. Apples from other countries are subject to a duty of 20 percent. Mexico's apple H.S. code is 080810.

Mexico Average Monthly Wholesale Apple Import Prices
Golden Delicious (Pesos/kilogram)

Month	2024	2025	Change (%)
January	52.94	53.00	-
February	54.12	54.00	-
March	50.00	49.00	-2
April	47.06	48.00	2
May	48.24	50.00	3.6
June	50.00	50.00	-
July	48.24	47.30	-2
August	47.06	46.20	-2
September	55.88	56.50	1.1
October	57.65	58.00	0.6
November	--	--	-
December	--	--	-

Source: National Market Information Service

Pears

Mexico Pears, Fresh – Production, Supply, and Distribution

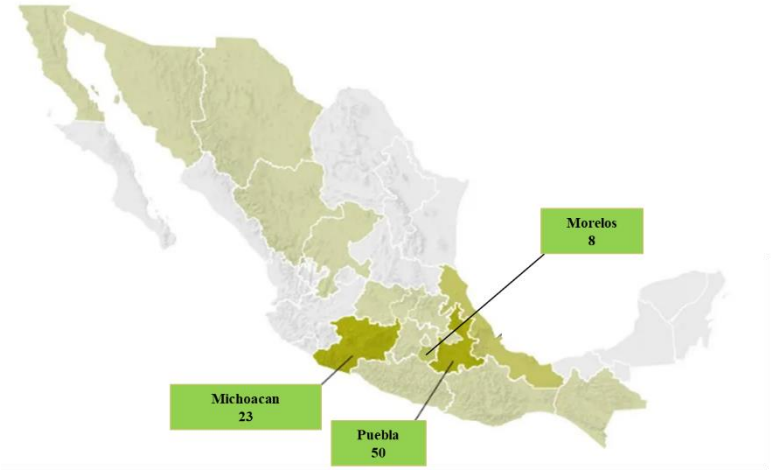
Pears, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
Mexico	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	3641	3641	3600	3544	0	3550
Area Harvested (HA)	3598	3598	3617	3472	0	3478
Bearing Trees (1000 TREES)	0	0	0	0	0	0
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total Trees (1000 TREES)	0	0	0	0	0	0
Commercial Production (MT)	26919	26919	26000	25874	0	25500
Non-Comm. Production (MT)	1000	1000	1000	1000	0	1000
Production (MT)	27919	27919	27000	26874	0	26500
Imports (MT)	81500	81533	80000	55120	0	55670
Total Supply (MT)	109419	109472	107000	81994	0	82170
Domestic Consumption (MT)	109369	109453	106900	81967	0	82155
Exports (MT)	50	19	100	27	0	15
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	109419	109472	107000	81994	0	82170
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Area

With available data for the past five years, the total planted area for pear cultivation in Mexico remains flat at around 3,600 ha on average year over year. With no evidence indicating any investment to develop the crop to large commercial scale, Post's forecast for MY 2025/26 (July to June) planted area is 3,550 ha. Pear production is concentrated in the states of Puebla, Michoacan, and Morelos, with only 17 percent of cultivation under irrigation.

Production
Post's production forecast for MY 2025/26 is 26,500 MT, practically unchanged from the previous MY due to the lack of investment in new technologies or to develop the crop to a large commercial scale. The sector is not expected to increase in volume in the near term. In MY 2024/25, Puebla, Michoacan and Morelos remained as the top pear producing states with 50 percent, 23 percent, and 8 percent of total national production respectively; together accounting for over 89 percent of Mexico's total pear production.

Pear Producing States in MY 24/25, Percent of Production



Source: SIAP

Consumption
Mexico's MY 2025/26 pear consumption is forecast at 82,155 MT. Domestic pear demand is mostly covered by imported fruit. Estimated imports for MY 2024/25 account for over 67 percent of national consumption. U.S. pears hold an estimated 60 percent market share of Mexico's pear imports. In general, Mexican consumers prefer imported pears due to their higher quality, consistency, and year-round availability. However, import prices remain 30-40 percent higher than locally grown product. The most consumed pear variety in Mexico is Anjou.

Trade
Mexico's pear imports for MY 2025/26 are forecast at 55,670 MT, showing some growth to cover slightly increased demand. MY 2024/25 imports are estimated at 55,120 MT based on available data. Further trade growth is limited due to high import prices and high inflation in Mexico. Exports remain negligible, with Post's forecast for MY 2025/26 at 15 MT.

Policy
There is no federal or local government support for pear production or marketing in Mexico. Regarding trade, Mexican phytosanitary regulations permit U.S. pear imports only from APHIS[2]-declared fruit-fly free zones in Oregon, Washington, and California.

[2] U.S. Department of Agriculture's Animal and Plant Health Inspection Service (APHIS)

Tariffs

The import duty on pears from the United States, Canada, Chile, and Argentina is zero. All other countries are subject to a duty of 20 percent. The Harmonized System (HS) code for fresh pears is 080830.

Table Grapes

Mexico, Grapes, Fresh Table – Production, Supply, and Distribution

Grapes, Fresh Table	2023/2024		2024/2025		2025/2026	
Market Year Begins	May 2023		May 2024		May 2025	
Mexico	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	23382	23382	23500	24807	0	24800
Area Harvested (HA)	22916	22916	23000	24518	0	24500
Commercial Production (MT)	385740	384740	385000	397407	0	390000
Non-Comm. Production (MT)	1000	1000	1000	1000	0	1000
Production (MT)	386740	385740	386000	398407	0	391000
Imports (MT)	111200	111247	130000	118829	0	126000
Total Supply (MT)	497940	496987	516000	517236	0	517000
Fresh Dom. Consumption (MT)	260240	259311	296000	297896	0	297000
Exports (MT)	237700	237676	220000	219340	0	220000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	497940	496987	516000	517236	0	517000
(HA) ,(MT)						

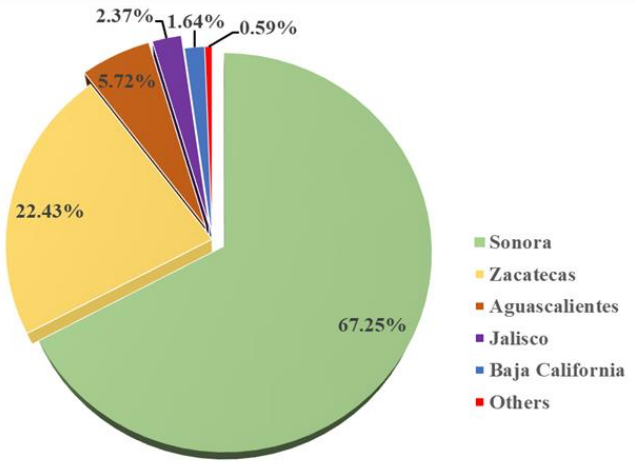
Area

MY 2025/26 (May–April) planted area is forecast at 24,800 ha, marginally below MY 2024/25 planted area as growers in Sonora replace old traditional grape vines with younger plants and gradually plant new varieties of grapes in the same fields as traditional grapes. Sonora's arid and semi-arid climate is beneficial for table grape production. Fruit of high export quality is obtained thanks to factors like low relative humidity, high temperatures, long hours of sunlight, and mild winters. While groundwater is currently available in this region and high-efficiency irrigation systems are used for water optimization, Sonora farmers face severe drought pressures from lack of rainfall. In addition, sudden low temperatures and rainfall during the fruit growth stages in spring and mid-summer present a challenge to produce exportable quality grapes. Most table grape growers are diversified into other crops including asparagus, squash, tomatoes, peppers, watermelon and pecan. In MY 2024/25, total planted area for grape production in Mexico reached 24,807 ha. The state of Sonora accounts for 67.3 percent of total planted area, followed by Zacatecas (22.4 percent), Aguascalientes (5.7 percent) and Jalisco (2.4 percent).

Production

Post’s production forecast for MY 2025/26 is 391,000 MT, a slight decrease from MY 2024/25, given that the table grape sector is essentially geared towards exporting a relatively constant volume to the United States within a three-month period. Sonora, Mexico’s largest table grape-producing state accounts for over 76 percent of national production, followed by Zacatecas (13.8 percent) and Jalisco (6.2 percent). Sonora is the largest producer of export-quality table grapes due to its desert-like climate and use of precision irrigation. While all the commercial fields in Sonora are under some type of irrigation system, producers indicate water availability is a constant challenge.

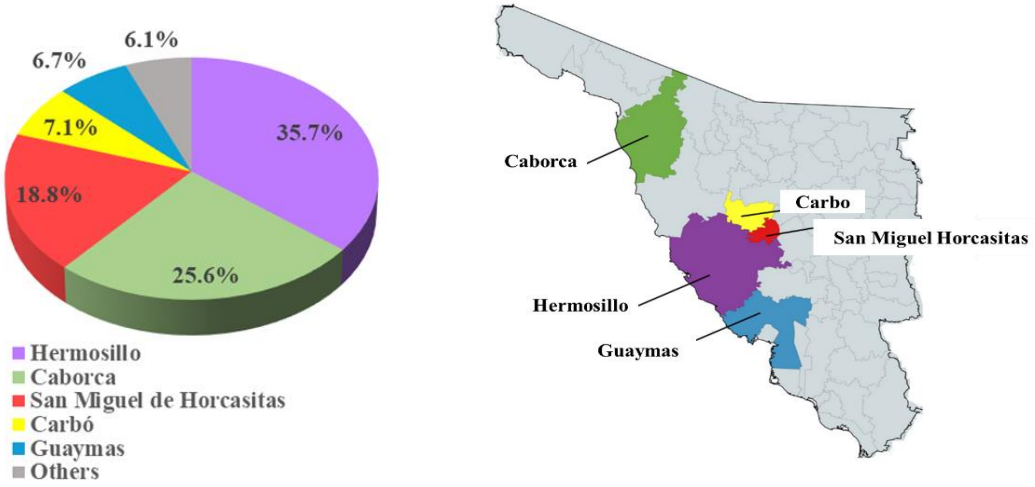
Table Grape Planted Area by Major Producing States in MY 2024/25



Source: Agri-food and Fisheries Information Service (SIAP)

During the May to July harvest window, over 90 percent of Sonora's crop is exported primarily to the United States. Zacatecas is the second largest table grape producer; most of its fruit is for the domestic juice industry; some volume also goes to the fresh retail market domestically. The third largest producer in terms of volume is Jalisco (despite having less planted area than Aguascalientes) with fruit mainly for export for the U.S. market. Hiring field labor for table grape production and harvesting in Sonora is a major challenge for growers. Many of the same trends mentioned in the apple section of this report exist in the grape sector as well. Sonora has previously accounted for more than 90 percent of Mexico's table grape area and production, but cultivation has expanded in several other states. Primary varieties grown in Sonora are Flame, followed by Early Sweet, Sweet Globe, Sweet Celebration, and Sugraone. The main table grape-producing municipalities in Sonora are Hermosillo, Caborca, San Miguel de Horcasitas, Carbó, and Guaymas. In MY 2024/25, the first three entities accounted for 80 percent of Sonoran production and 61 percent of national production.

Sonora Table Grape Production Share by Municipality in MY 2024/25



Source: Agri-food and Fisheries Information Service (SIAP)

Consumption
The consumption forecast for MY 2025/26 is 297,000 MT, slightly less than MY 2024/25 estimated consumption due to a small drop in domestic production, high inflation, and more focus on export markets. For most Mexican consumers, table grapes are a luxury item; and imported fruit, in particular new varieties, are usually only available in high-end grocery stores. In MY 2024/25, the average wholesale price per kilogram for U.S. Red Globe was 44.42 pesos ($2.40), while the average retail price for Red Globe and Whites averaged 149.50 pesos ($8.04) per kilogram. At retail stores, new grape varieties are premium priced above traditional grapes. The average price per kilogram for Moon Drops is 179.00 pesos ($9.63), while Tear Drop and Cotton Candy averaged 199.00 pesos ($10.70) per kilogram.

Trade
Imports for MY 2025/26 are forecast at 126,000 MT, up 6 percent from the MY 2024/25 estimate of 118,829 MT. With the small drop in Mexico's domestic supply, Post anticipates a slight growth in imports of U.S. grapes. Mexico is consistently a top-tier market for U.S. table grapes, second only to Canada. U.S. shipments of table grapes flow primarily through the Nogales – San Diego customs districts since all of the fruit for export to Mexico is California grown. Likewise, exportable table grapes from Sonora cross into the United States mainly through the Nogales district.

Post forecasts Mexico's MY 2025/26 exports at 220,000 MT, largely flat from the MY 2024/25 estimate. This reflects stability in exports over the last five years. With production and consumption projected to remain consistent year-over-year, exportable supply maintains a steady level. Over 98 percent of Mexico's table grape exports are destined for the United States; the remaining go to Japan, Guatemala, Costa Rica, and Belize.

Policy
Mexico's regulations restrict the importation of U.S. table grapes to only California-grown fruit following specific import requirements. For specific details on Mexico's import requirements for table grapes, visit Mexico's Secretariat of Agriculture and Rural Development's (SADER) / National Service for Health, Food Safety, and Food Quality (SENASICA) website.

Tariffs
Under Mexico's current trade agreements, the import duty on grapes from the United States, Chile, and Peru is zero. Table grapes from all other origins are subject to a 15 percent tariff. The Harmonized System (HS) code for fresh grapes is 0806.10.

Average Monthly Wholesale Red Globe Import Prices
(Pesos/kilogram)

Month	2024	2025	Change (%)
January	44.83	46.25	3.2
February	43.75	43.75	0
March	40.9	50.00	22.2
April	45.45	46.25	1.8
May	48.01	46.25	-3.7
June	43.75	43.75	0
July	43.32	40.00	-7.66
August	46.7	43.75	-6.3
September	46.75	41.25	-11.8
October	43.61	43.00	-1.4
November	NA	NA	-
December	NA	NA	-

Source: National Service for Market Information

Attachments:

No Attachments