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Report Name: Berry Annual Voluntary

Country: Mexico

Post: Guadalajara

Report Category: Fresh Fruit

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Report Highlights:

Post forecasts Mexico's berry production for calendar year 2026 to increase by 4 percent to 1.2 million MT across blueberries, raspberries, blackberries, and strawberries. This growth in production is driven by Mexican industry's investments in improved varieties, adoption of modern growing techniques, and changes to harvest timing to capture premium pricing windows in international markets. Mexico's largest area of production continues to be strawberries, which represent 54 percent of total production. Blueberry production is forecast to substantially grow as Mexican growers shift to focus on premium markets, leveraging the spring window to reduce competition with Peruvian exports to the U.S. market. Mexico is expected to maintain its position as the top supplier of fresh berries to the United States in 2026.

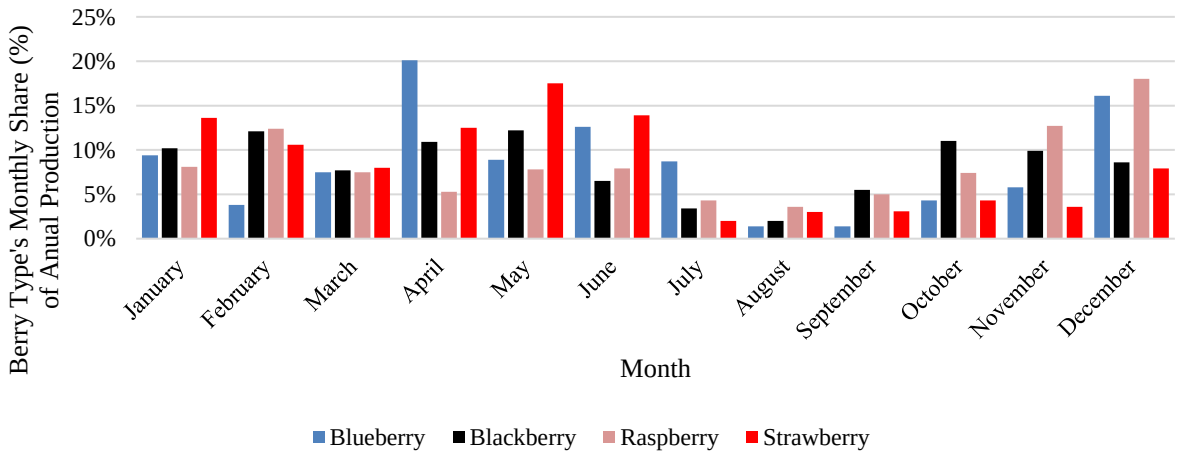
Production

For calendar year (CY) 2026, Post forecasts Mexican berry production at 1.2 million MT, a 4 percent increase from 2025. This growth in production is driven by Mexican industry's investments in improved varieties, adoption of modern growing techniques, and improvements in harvest timing to capture premium pricing windows in international markets.

The berry industry in Mexico is heavily concentrated in two main windows: the late winter to spring (January through June) and the late fall (November to December). Notably, every berry variety experiences a significant production slump during the summer months (July to September) when shares drop to their lowest annual levels (see Graph 1).

Weather and water availability remain key factors shaping Mexico's berry production sector. Persistent drought conditions throughout much of 2024 and early 2025 in northern and north-western berry producing areas led to tighter irrigation controls and heightened competition for water. However, starting in June 2025, increased rainfall improved national reservoir levels and reduced the overall drought footprint by early 2026, easing some pressure on water supplies. Across all berry types, producers continue to invest in more efficient irrigation, protected cultivation, and drought-tolerant varieties to mitigate climate and water risks and sustain yields.

Graph 1: Monthly Share by Berry Type of Annual Production in Mexico, 2025



Data Source: Agri-Food and Fisheries Information System (SIAP)

Strawberries

Post forecasts Mexico's strawberry production for CY 2026 at 621,450 MT, a 2 percent increase from 2025. Strawberry production in Mexico is stabilizing, with the national per capita consumption increasing and steady exports to the United States and other markets. An estimated 60 percent of Mexico's production is destined to the export market, though local consumption and the local processing

industry continue to grow. Although production has remained stable, the appreciation of the Mexican peso has hurt both growers and exporters. Local production costs (i.e., production supplies and packaging) remain high, further reducing profit margins.

Table 1: Mexican Strawberry Production 2022 – 2026

Year	Planted Area (Ha)	Harvested Area (Ha)	Production (MT)
2022	12,739	12,547	578,000
2023	13,425	13,250	642,000
2024	15,097	14,687	645,452
2025*	15,086	14,827	610,000
2026**	15,350	15,050	621,450

Data Source: Agri-Food and Fisheries Information System (SIAP)
**Post Estimate, **Post Forecast*

Strawberry growers are minimally expanding their planted area while continuing the implementation of modern agricultural practices to meet demand and sustain product quality. Producers largely saw adequate climate conditions for CY 2025, with good rain levels and the continuous installation of irrigation systems in their fields.

Mexican producers can obtain between 43 MT and 60 MT of strawberries per hectare, depending mostly on geographical location and weather. Most Mexican strawberry production occurs in high-wind tunnels, keeping strawberries cool and fresh while being better protected from weather spikes and pests. Growers use strawberry varieties that predominantly come from California and Florida like the Festival, Sweet Charlie, Albion, Camarosa, and San Andreas varieties.

Mexico continues to enjoy a year-round production cycle of strawberries, with their highest harvest cycle occurring between January and June. The harvest cycle reaches its peak each year in May. Mexican strawberry production flourishes in subtropical climates, making certain areas in Mexico ideal for production because of their high altitude (central states like Michoacán and Guanajuato) or their unique coastal valley areas in the Baja California areas. The optimal temperature range for strawberry growth is between 59°F to 77°F (15°C and 25°C) during the day and 46°F to 55°F (8°C to 13°C) at night. Strawberry plants are subject to heat stress when temperatures rise higher than 86°F (30°C).

Mexico's strawberry production for CY 2025 is estimated at 610,000 MT, reflecting a decline from the previous year. This is a result of the macro-economic pressure Mexican growers experienced with the appreciation of the Mexican peso in 2025 and weather volatility in 2024 that delayed some of the

planting in major strawberry producing areas. Despite this drop, production remains stable overall, supported by continued adoption of modern agricultural practices and steady export demand.

Map 1: Main Strawberry Production Areas

Data Source: FAS Mexico & SIAP

Table 2: Top Strawberry Producing States in Mexico, 2025 Production (MT)

Location	Production (MT)	Share of Total Mexican Strawberry Production
Michoacan	377,430	62%
Baja California	112,040	18%
Guanajuato	93,736	15%
Other States	26,795	4%

Data Source: SIAP

Blackberry

Post forecasts Mexico's blackberry production for CY 2026 at 274,000 MT, a 3 percent increase from 2025. This is a result of continued strong export demand and optimization of cultivation practices. Mexico exports close to 50 percent of its total production of blackberries, primarily to the U.S. market. Mexican producers are also transitioning away from the Tupi variety to higher-yielding varieties like Erandy, Sultana, and Victoria.

Table 3: Mexican Blackberry Production 2022 – 2026

Year	Planted Area (Ha)	Harvested Area (Ha)	Production (MT)
2022	10,155	9,609	222,623
2023	11,309	10,780	236,988
2024	11,496	11,406	256,503
2025*	12,415	12,200	266,000
2026**	12,800	12,600	274,000

Data Source: Agri-Food and Fisheries Information System (SIAP)
**Post Estimate, **Post Forecast*

The phase out the Tupi variety, which previously accounted for most of the Mexican blackberry production, is one of the biggest technical shifts in the industry in the past ten years. Industry reported that this variety was developed for durability, not necessarily for flavor. New varieties introduced by growers are expected to offer a sweeter profile and boost yields.

According to Mexican industry, blackberry yields are expected to increase to around 22 MT per hectare in 2026, increasing production in the major producing areas of central Mexico (Michoacán and Jalisco). Mexican growers are achieving higher yields by replacing older varieties with high-productivity, disease-resistant genetics that thrive in high-density planting systems. Additionally, the widespread adoption of macro-tunnels and precision drip irrigation protects the fruit from weather damage and ensures optimal nutrient delivery for year-round harvesting.

Photo 1: Berry Production Tunnels in the Valles Area in Jalisco, Mexico

Source: Photo taken by FAS Guadalajara staff in February 2026

Mexico maintains nearly year-round production of blackberries, though volumes drop significantly during the summer months due to heavy rainfall. The primary harvest cycle occurs between October and

June. Blackberry production in Mexico thrives in subtropical climates across key states like Michoacán, Jalisco, and Baja California. These regions experience warm, sunny conditions with a summer rainy season providing essential moisture, though irrigation management is critical to prevent waterlogging amid occasional heatwaves exceeding 86°F (30°C) that can stress plants and reduce yields.

Blackberry bushes become commercially viable during the third-year post-planting. Normally, growers in Mexico keep their bushes for approximately six to eight years until yields begin to decline and new varieties become available on the market. The central state of Michoacán produces 90 percent of the yearly output of blackberries.

Mexico's blackberry production for CY 2025 is estimated at 266,000 MT, reflecting continued growth supported by improved yields and favorable climate conditions, particularly in Michoacán and Jalisco.

Map 2: Main Blackberry Production Areas

Data Source: FAS Mexico & SIAP

Table 4: Top Blackberry Producing States in Mexico, 2025 Production (2025)

Location	Production (MT)	Share of Total Mexican Blackberry Production
Michoacan	236,886	89%
Jalisco	21,916	8%
Sinaloa	2,026	1%
Other States	5,172	2%

Data Source: SIAP

Raspberry

Post forecasts raspberry production for CY 2026 at 194,000 MT, a 7 percent increase. This growth is primarily due to producers adopting new raspberry varieties, enabling higher yields. Around 80 percent of Mexico's raspberry production is destined to international markets, which is the major driver to keep the industry growing.

Table 5: Mexican Raspberry Production 2022 – 2026

Year	Planted Area (Ha)	Harvested Area (Ha)	Production (MT)
2022	9,279	9,274	179,000
2023	10,129	10,095	190,410
2024	9,884	9,873	176,000
2025*	9,487	9,480	181,000
2026**	11,200	11,150	194,000

Data Source: Agri-Food and Fisheries Information System (SIAP)
**Post Estimate, **Post Forecast*

Mexican industry projects raspberry yields to climb toward a new baseline of 18.20 to 20 MT per hectare, driven by the widespread transition to irrigated systems and macro-tunnels. More producers are also starting to shift towards planting on substrate pots rather than directly into the soul, allowing them to more directly control acidity, irrigation, and nutrient content. According to industry, producers are focusing in 2026 on proprietary varieties like Maravilla and Enrosadira to obtain bigger sizes, sweeter flavors, and extended shelf life. While some old varieties remain planted for the 2026 season, high-yield and pest-resistant genetics are increasing in the orchards.

Mexico maintains year-round production of raspberry, due to adequate climate conditions, with some atypical temperature spikes occurring during the autumn. The early winter harvest periods provide high production areas like Jalisco with better suited soils and climates that drive production of raspberries during the last months of the winter. Summer is Mexico's low season for raspberry production.

Access to water and climate conditions continue to be a major topic for raspberry production, as unpredictable weather conditions (like heat spikes or intense abnormal rain) forces producers to keep investing in tunnel technology to reduce raspberry losses. Ideal weather conditions must be between 59°F and 75°F (15°C and 24°C) to obtain ideal sizes and keep the flavor profile to what the market demands.

Post estimates raspberry production for CY 2025 at 180,000 MT, a 2 percent increase from 2024. This growth reflects enhanced operational efficiency as producers shifted toward high-density substrate cultivation and precision nutrient irrigation, which help to maximize fruit weight while minimizing water and nutrient waste. Furthermore, the adoption of advanced macro-tunnel technology and new varieties has significantly improved pack-out rates by producing more uniform, weather-resistant fruit.

Map 3: Main Raspberry Production Areas

Data Source: FAS Mexico & SIAP

Table 6: Top Raspberry Producing States in Mexico, 2025 Production (MT)

Location	Production (MT)	Share of Total Mexican Raspberry Production
Jalisco	120,600	67%
Michoacan	34,200	19%
Baja California	18,000	10%
Other States	7,200	4%

Data Source: SIAP

Blueberry

Post forecasts Mexico's blueberry production for CY 2026 at 85,000 MT, a 16 percent increase from 2025. Mexican industry has shifted its production window and strategies to reduce direct competition with Peru, helping the industry rebound from a slump in production in 2025. Mexico is also adopting new varieties and growing techniques, helping boost yields. Over 80 percent of blueberry volumes are exported to international markets, with the United States as the top destination.

Table 7: Mexican Blueberry Production 2022 – 2026

Year	Planted Area (Ha)	Harvested Area (Ha)	Production (MT)
2022	4,444	4,331	66,847
2023	6,553	6,490	74,800
2024	6,676	6,627	81,000
2025*	6,008	5,964	73,500
2026**	7,200	7,150	85,000

Data Source: Agri-Food and Fisheries Information System (SIAP) & USDA Agronometrics
**Post Estimate, **Post Forecast*

Mexico is now aiming to leverage the spring window (February to May) utilizing substrate technology and superior blueberry varieties to deliver premium fruit to international markets. By shifting their peak harvest to the spring, Mexican growers are avoiding a more direct price war with Peru and ensuring their product hits the market just as the South American offer begins to taper off and before the U.S. domestic season starts. This leads to higher volume and better prices in a concentrated four-month period.

Mexican growers continue to phase out the older Biloxi variety to opt instead for planting high-density genetics like Sekoya, Pop, AzraBlue, and Madeira. These varieties favor larger sizes (30 to 40 percent heavier) with a higher crunch factor, making Mexican blueberries a premium product for international and national consumers. These changes are expected to allow Mexico to increase pricing and take some market share from Peruvian bulk exports.

Besides the change in genetics, Mexico is transitioning to pot/substrate planting, using coconut coir or peat moss as a soil. This is allowing producers to plant higher densities and increase production. According to growers from Mexico's blueberry sector, a significant proportion of Mexico's berry production has already transitioned to pot/substrate planting, allowing growers to have more than 8,000 plants per hectare compared to the traditional 3,500 in soil.

Blueberry production requires a low-chill environment with optimal temperatures ranging between 68°F to 77°F (20°C to 25°C) and nighttime temperatures oscillating between 50°F to 59°F (10°C and 15°C). Producers rely on high tunnels to protect and filter strong UV radiation.

For CY 2025, Post estimates blueberry production at 73,500 MT, a 10 percent decline from 2024. This decline in production is mainly a result of producers facing direct competition from other blueberry producers in the region like Peru and Chile, competing predominantly on volume. This has forced Mexican producers to change their strategy and deliberately shift their harvest season.

Map 4: Main Blueberry Production Areas

Data Source: FAS Mexico & SIAP

Table 8: Top Blueberry Producing States in Mexico, 2025 Production (MT)

Location	Production (MT)	Share of Total Mexican Blueberry Production
Jalisco	44,000	52%
Michoacan	16,506	19%
Sinaloa	9,200	11%
Other States	15,294	18%

Data Source: SIAP

Consumption

Post forecasts Mexican berry consumption at 499,450 MT for CY 2026, a 4 percent increase from 2025. This is mainly a result of concerted industry efforts to increase national consumption. Despite this growth, over 60 percent of Mexico's production is forecast to go to the export market.

The Mexican berry growers, primarily represented by Aneberries (National Association of Berry Exporters of Mexico), have transitioned from a purely export focused model to a stronger emphasis on promoting Mexican domestic consumption of berries. To combat the perception of berries as luxury goods, producers are implementing varietal replacement programs, swapping out older varieties for more resilient, high-yield genetics that allow for a more stable and affordable year-round supply for local supermarkets. Additionally, growers are investing in cold-chain expansion within Mexico to ensure that the fruit arriving in major metropolitan cities can maintain the same export quality and freshness that the international market enjoys.

Consumers in Mexico are also increasingly recognizing the health benefits of berries, helping to deepen market penetration. Industry is leveraging educational marketing campaigns focused on the "superfood" status of berries. These initiatives target health-conscious Mexican consumers by highlighting high antioxidant content and the benefits of berries for consumer health.

Strawberries remain the undisputed king of domestic preference, with a per capita consumption of approximately 5.4 lbs (2.4 kg) per person per year. Next are blackberries at 2.6 lbs (1.2 kg) per person. Raspberries and blueberries continue to be on the premium end of the berry consumption spectrum since those are considered niche items and do not have as high production volumes as the other two. Per capita raspberry consumption sits at 0.7 lbs (340 grams) and blueberries at 0.27 lbs (120 grams) per person.

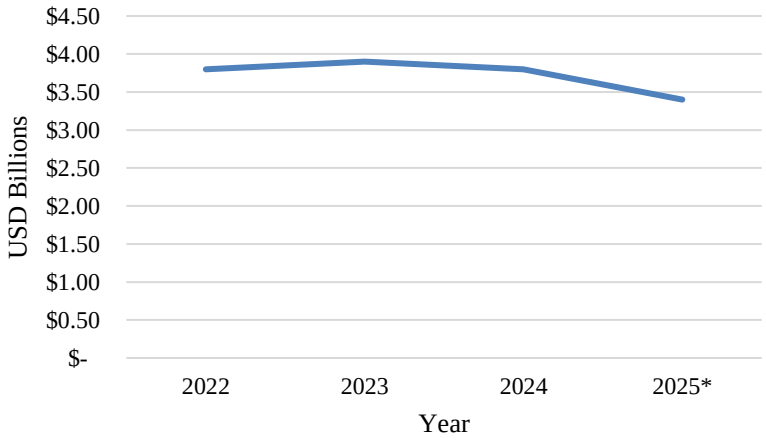
Trade

Post forecasts Mexican berry exports for CY 2026 to reach 715,000 MT, up 2 percent from 2025. Around 80 percent of these exports are expected to go the U.S. market. This is based on growing export demand and gains in optimized production.

For CY 2025, Post estimates Mexican exports of berries increased by 7 percent to 700,500 MT. This increase in exports was a result of market diversification for Mexican berry exporters, supplying berries to new markets outside of North America. Export values during the same period declined by 12 percent to $3.4 billion USD in 2025, driven in part by a price war with Peru on blueberries during the autumn.

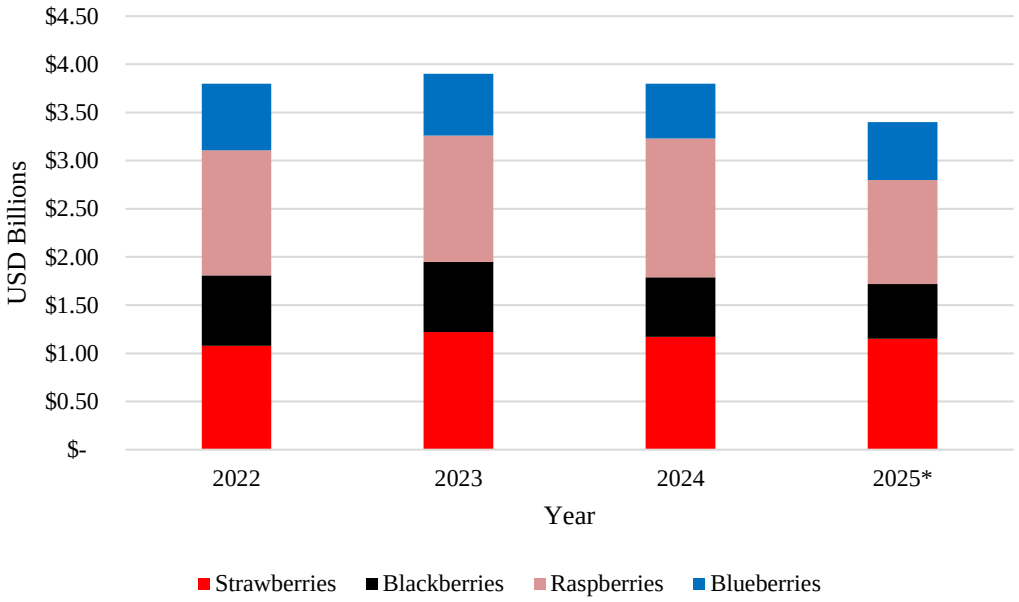
Mexico’s berry imports for CY 2026 are expected to remain minimal. The United States is Mexico’s main supplier of berries, with CY 2026 imports (mainly strawberries) forecast to reach 40,000 MT, helping cover national demand when Mexico faces their summer slump.

Graph 2: Mexican Berry Exports (USD billions)
(Blackberries, Raspberries, Strawberries, Blueberries)



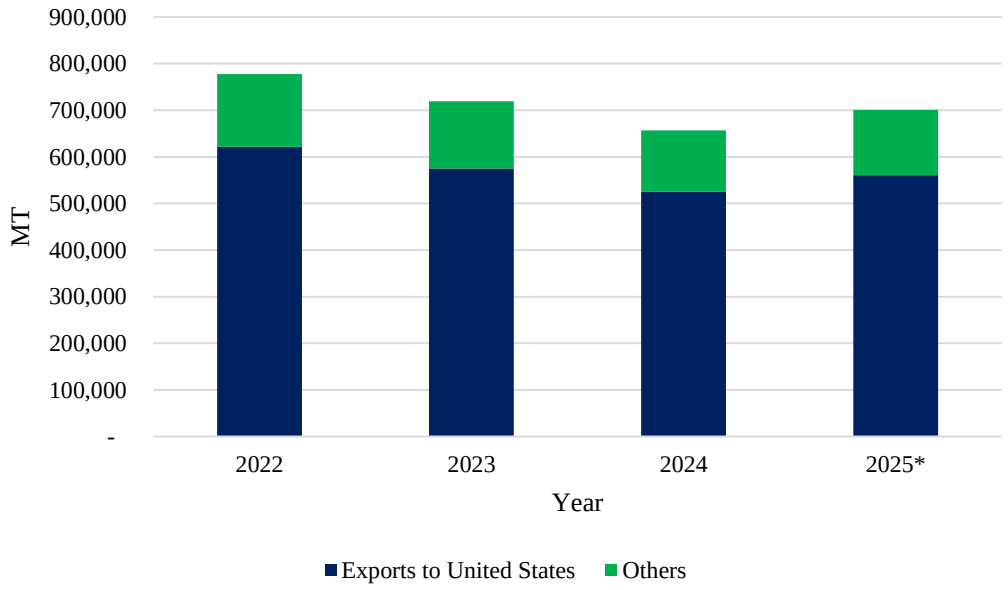
Data Source: Global Agricultural Trade System, Mexican Central Bank, Mexican Secretariat of Economy & Trade Data Monitor
**Post Estimate*

Graph 3: Mexican Berry Exports (USD billions)



Data Source: Global Agricultural Trade System, Mexican Central Bank, Mexican Secretariat of Economy & Trade Data Monitor
**Post Estimate*

Graph 4: Mexican Berry Exports (MT)



Data Source: Global Agricultural Trade System, Mexican Central Bank, Mexican Secretariat of Economy & Trade Data Monitor
**Post Estimate*

Attachments:

No Attachments.