

# U.S. Strawberry Market Report: 2021-2022

International Fresh Produce Association is committed to providing members with relevant market data and insights to guide their business considerations and decisions. This paper discusses the strawberry market in the United States from November 1, 2021, to October 31, 2022. The data was collected and analyzed by Ag Tools.

**“Mexico is one of the main suppliers of strawberries to the United States, especially during the winter and spring. In recent years, Mexico has exported strawberries until the beginning of August.”**

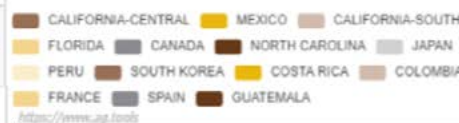
– Joe Watson, IFPA Vice President Of Retail, Foodservice, Wholesale Membership

## SUPPLIER VOLUME BY REGION: 2021-2022

USA Volume Report

Location	Volume Lbs	Description	Var. %
CALIFORNIA-CENTRAL	1,285,847,953	71,708,497 lbs more than same period 2020-2021	5.91%
MEXICO	485,999,416	59,167,240 lbs less than same period 2020-2021	-10.85%
CALIFORNIA-SOUTH	325,716,327	34,181,559 lbs more than same period 2020-2021	11.72%
FLORIDA	252,944,400	40,712,344 lbs more than same period 2020-2021	19.18%
CANADA	5,959,467	2,668,477 lbs more than same period 2020-2021	81.08%
NORTH CAROLINA	4,368,284	122,508 lbs less than same period 2020-2021	-2.73%
JAPAN	30,894	17,087 lbs less than same period 2020-2021	-35.61%

Range: 2021-11-01 to 2022-10-31



PERU	14,626	1,260,039 lbs less than same period 2020-2021	-98.85%
SOUTH KOREA	8,888	20,645 lbs less than same period 2020-2021	-69.90%
COSTA RICA	4,875	966 lbs less than same period 2020-2021	-16.54%
COLOMBIA	3,624	4,778 lbs less than same period 2020-2021	-56.87%
FRANCE	214	1,043 lbs less than same period 2020-2021	-82.98%
SPAIN	183	487 lbs less than same period 2020-2021	-72.69%
GUATEMALA	75	39,868 lbs less than same period 2020-2021	-99.81%
<b>Total:</b>	<b>2,360,899,226</b>		



During the study period, although 14 regions supplied strawberries to the U.S. market, only four regions had a significant share. The other 10 regions had very small market shares and even less volume shipped.

- Central California is the main supplier with 54.5% share
- Mexico supplies 20.5%
- Southern California provides 13.8%
- Florida contributes 10.7%

## GROWTH AND MARKET SHARE BY REGION

COMPARATIVE OF GROWTH BY REGION OF STRAWBERRIES FROM NOVEMBER 15T 2021 THRU OCTOBER 31ST 2022						
REGION	2021-2022	PART %	VAR LBS	VAR %	2020-2021	PART %
California central	1,285,847,953	54.5%	70,708,497	5.8%	1,215,139,456	53.5%
México	485,999,416	20.6%	(59,167,240)	-10.9%	545,166,656	24.0%
California South	325,716,327	13.8%	34,181,559	11.7%	291,534,768	12.8%
Florida	252,944,400	10.7%	40,712,344	19.2%	212,232,056	9.3%
Rest of the regions	10,391,130	0.4%	1,446,055	16.2%	8,945,075	0.4%
<b>TOTAL (Lbs)</b>	<b>2,360,899,226</b>	<b>100.0%</b>	<b>87,881,215</b>	<b>3.9%</b>	<b>2,273,018,011</b>	<b>100.0%</b>

During the study period, the market grew 3.9%, from 1.3 million tons of fruit in 2021 to 1.7 million tons in 2022. This is a result of mixed performances from the top five regions:

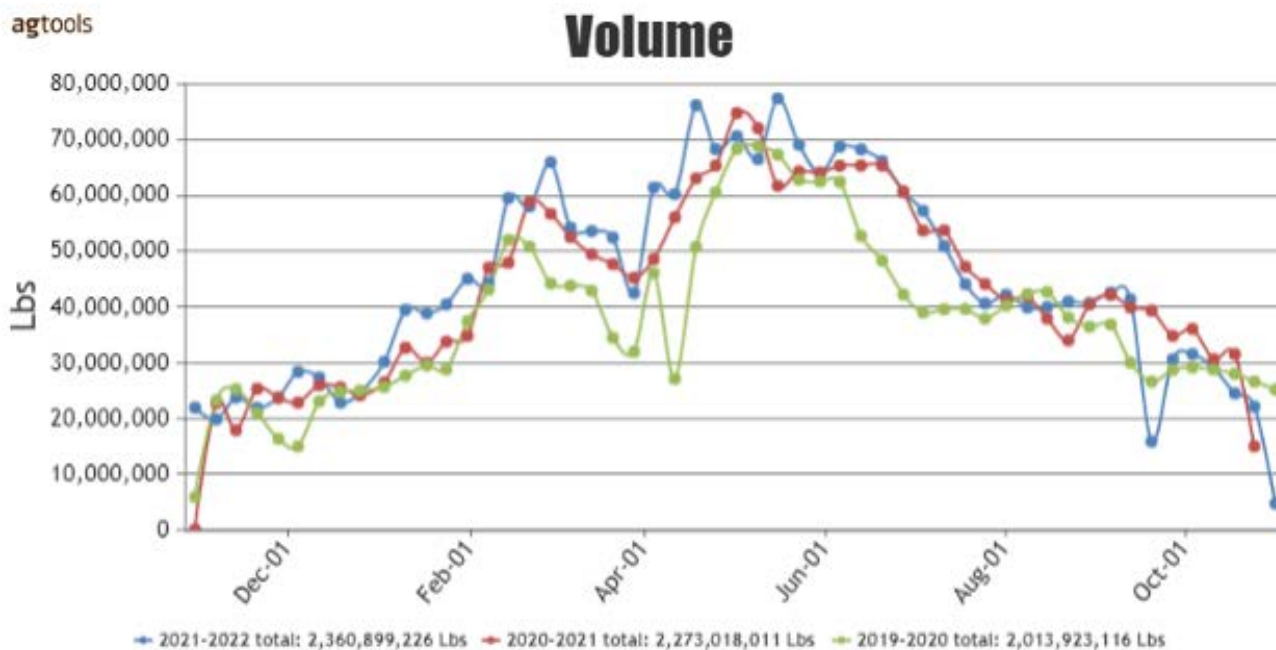
- Central California showed moderate 5.9% growth as its market share increased from 53.4% to 54.5%.
- Mexico volume declined 10.9%, with its market share falling from 24% to 20.6%. Mexico showed significant growth in the year prior, so this decline shows a return to more normal numbers.
- Southern California had a growth of 11.7% with a 13.8% market share.
- Florida showed the most growth, at 19.2% and a market share of 10.7%.
- The other regions, taken collectively, grew slightly.





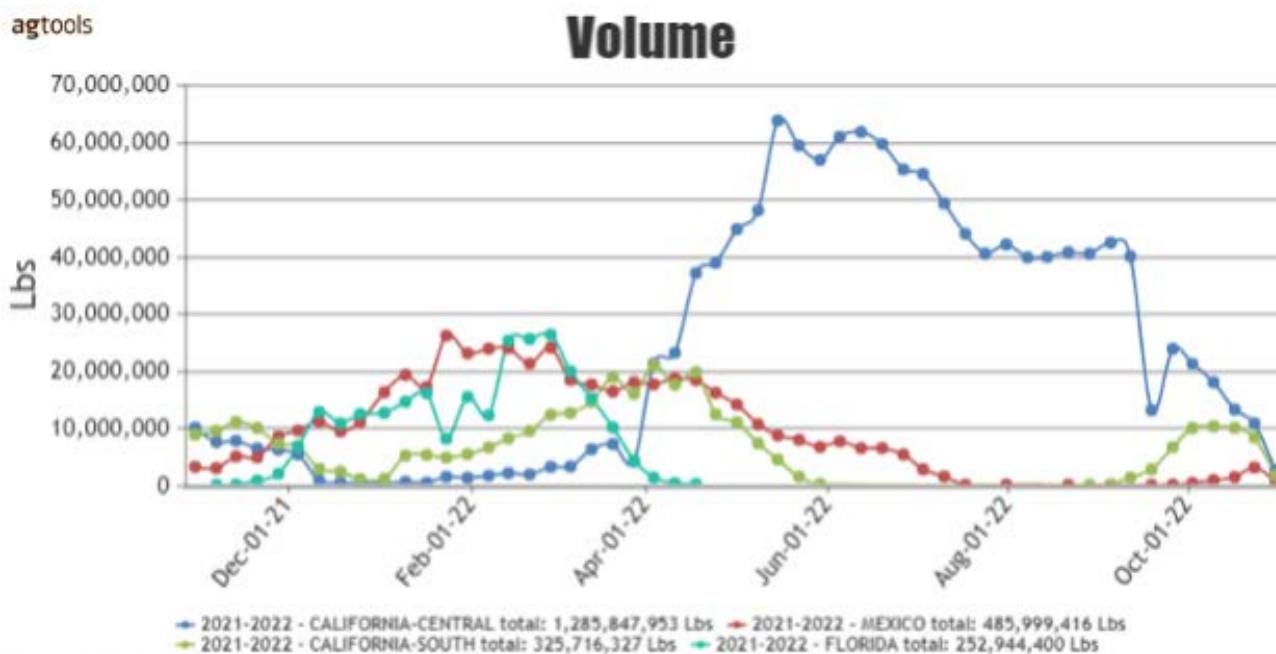


### THREE-YEAR COMPARISON OF TOTAL STRAWBERRY VOLUME IN THE U.S. MARKET



Market distribution was typical during the study period, rising in winter and spring, peaking in summer, declining through autumn. In 2020, volume dropped in March and April because of the pandemic, and there was a very pronounced decline in July. Traditionally, volume drops in March as Mexican production declines and distribution shifts to California’s early season. California production peaks in May and June and declines July to October.

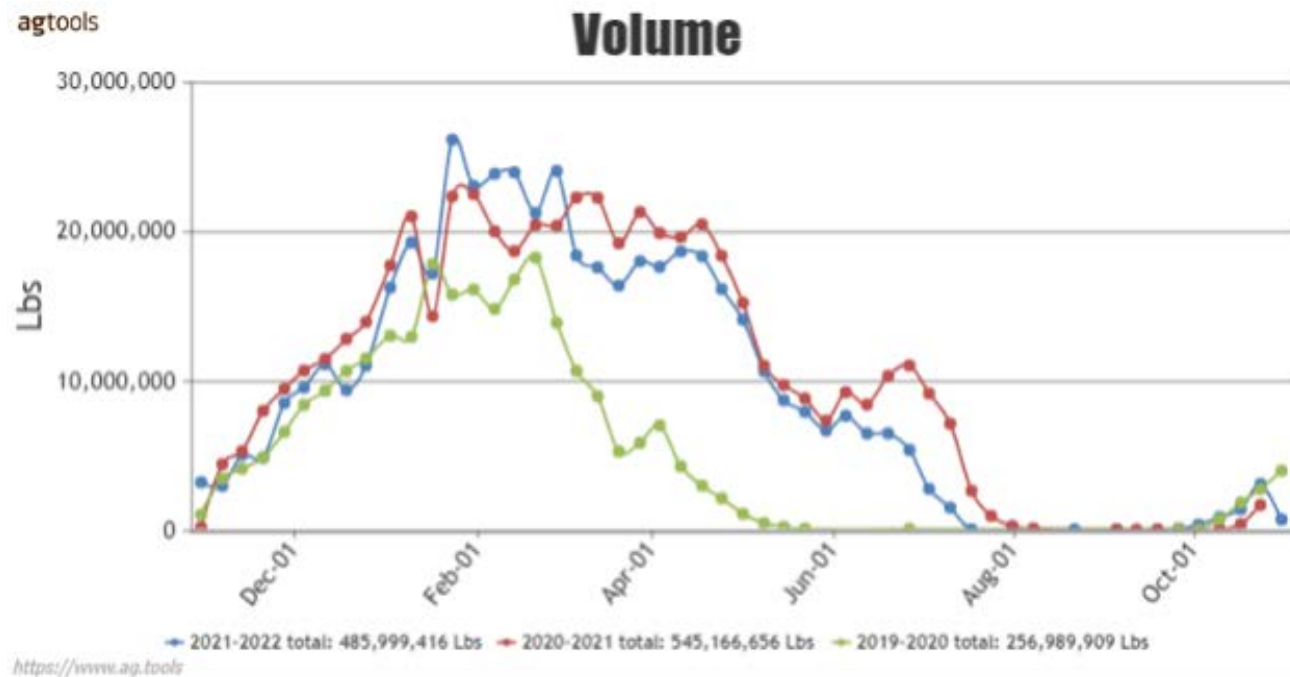
### WEEKLY STRAWBERRY VOLUME BY REGION





This production overlap is illustrated in this graph, showing the interaction of the four main producing areas, their increases, peaks, and decreases, as well as the transitions to the next region. Central California production (blue line) is the strongest of the entire year. Mexico's production peak is lower, but Mexico offers product in 10 of the 12 months. Southern California and Florida have shorter and more-defined production times. The sharp volume drop in Central California in September results in product shortages as Mexico and Southern California are just starting their season and do not cover all the demand.

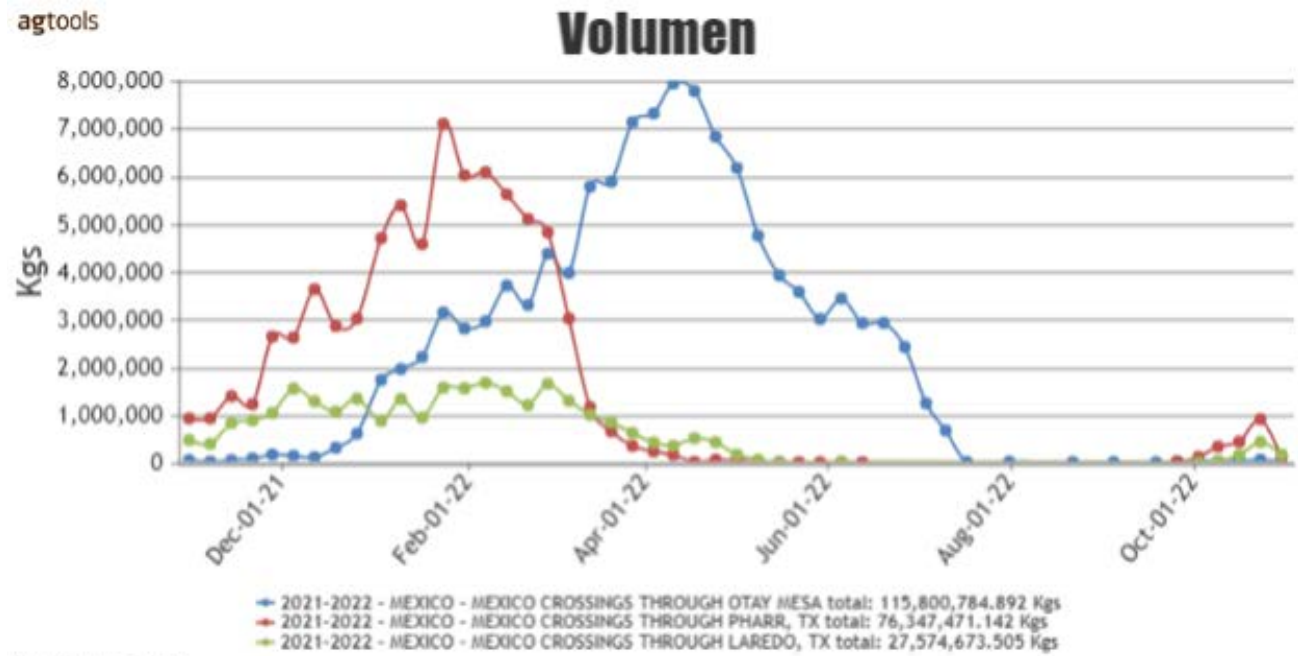
## WEEKLY VOLUME COMPARISON FOR MEXICAN STRAWBERRIES IN THE U.S. MARKET



Mexican production begins in October each year and grows week by week, reaching its highest level between the last week of January and the first week of February. In 2020, production declined week-by-week from March to the first week of June. For 2021 and 2022, production continued for several more weeks, until the decline began in May and the season ended in August. Production in 2021 was higher than in 2022 from March to August, a decline of almost 11%.

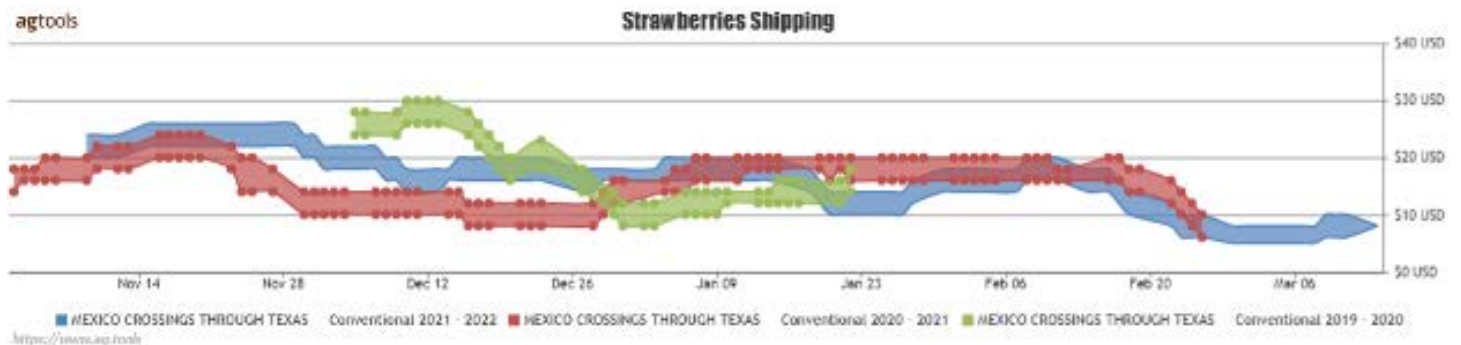


## STRAWBERRY IMPORTS FROM MEXICO THROUGH THE THREE MAIN U.S. CROSSINGS



The most active point of entry in terms of volume is Otay, California, which handled 115,000 tons of fruit from November to August. The second busiest point of entry is Pharr, Texas, which handled 76,000 tons of fruit between October and April. The third is Laredo, Texas, which mimics Pharr’s seasonality, but its volume reached only 27,000 tons. This is also indicates the production areas, as the fruit usually crosses the border at its closest point of entry.

## THREE-YEAR COMPARISON OF MEXICAN STRAWBERRIES AT THE MCALLEN/PHARR, TEXAS CROSSING

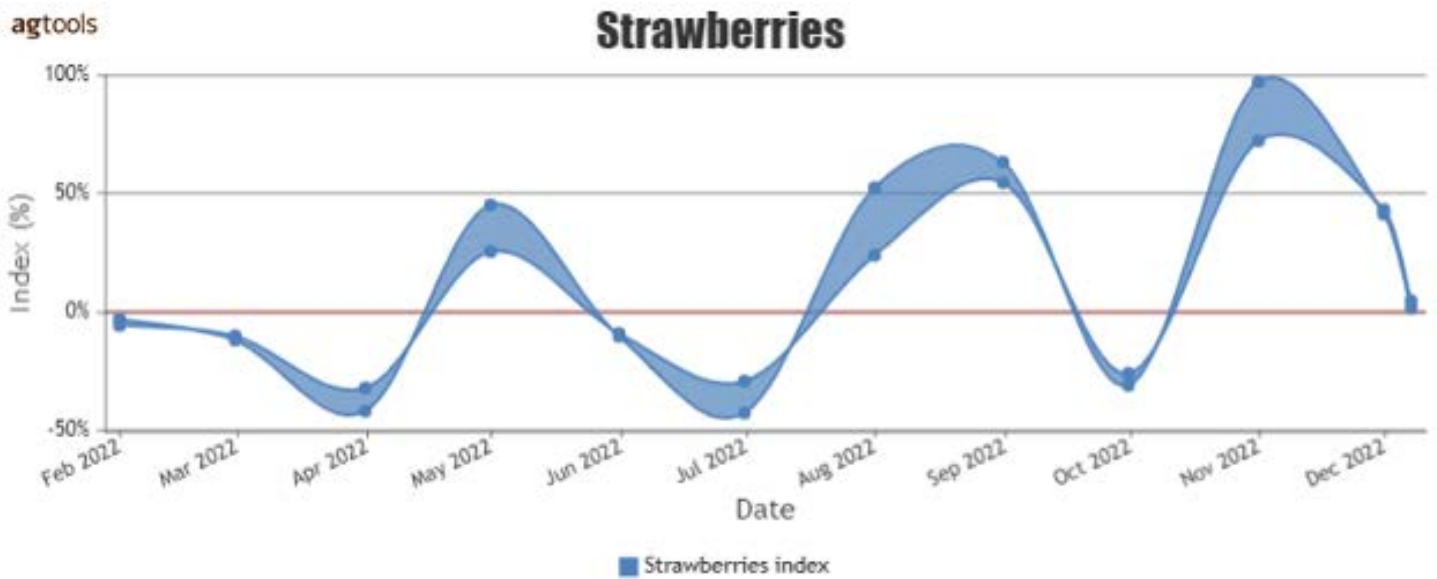


Looking at prices at the Pharr crossing, the starting price typically tops \$20, but it drops by December. In 2021 (red line) prices rebounded in January recovering from \$12 to \$20, then stabilizing until the last week of February. In the 2022 season, the price drop was later and smaller, and the season closed below \$10.





## MONTHLY STRAWBERRY INFLATION INDEX IN THE UNITED STATES IN 2022



An important indicator is the inflation index, which shows price variations compared to the previous year in the U.S. market.

This graph covers January 1 to November 14, 2022. Early in the year, the fruit was cheaper than the previous year, and during spring and summer it fluctuated more, reaching its highest level in November. Regardless of the monthly movements, there is growth throughout the year.

When the 2022-2023 strawberry season began, initial data showed 9% less volume and higher prices than the previous year, in fact, higher than several years, which could translate into better returns for farmers and industry.

For more information, market data, and insights, consult [IFPA's online resource directory](#).

