

**Voluntary Report** – Voluntary - Public Distribution

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**Report Number:** MX2024-0049

**Report Name:** Stone Fruit Annual

**Country:** Mexico

**Post:** Guadalajara

**Report Category:** Stone Fruit

**Prepared By:** Manuel Mandujano

**Approved By:** Abigail Nguema

**Report Highlights:**

Mexico's 2024 peach production is forecast at 266,400 metric tons (MT), a three percent increase over 2023, driven by steady domestic demand and minimal exports. Peach imports are forecast to grow in 2024, mostly from the United States and Chile. Cherry production is forecasted at 139 MT in 2024, a six percent increase over 2023. Cherry exports from the United States are projected to cover a significant portion of domestic demand.

## **Executive Summary**

### **Peaches**

Mexico's 2024 peach production is forecast at 266,400 metric tons (MT), a three percent increase over 2023, driven by increased domestic consumption and stagnant imports. Over the past decade, Mexico's peach industry has experienced notable fluctuations in both planted and harvested areas, with a general decline until around 2019, followed by a gradual increase. Production has been increasing in recent years, despite varying planted area, reflecting yield improvements due to enhanced agricultural practices, improved varieties, favorable climatic conditions, access to water, and consumer awareness. Mexico's peach consumption is covered primarily by domestic production and supplemented by minimal imports mainly from the United States and Chile. U.S. peach exports to Mexico are primarily from May to October.

### **Cherries**

Post forecasts Mexico's calendar year (CY) 2024 fresh cherry production at 139 MT, a six percent increase over 2023. Imports will continue to play a major role for Mexican consumers as Mexico is not a major cherry producer. Production was an estimated 130 MT in CY 2023, with Puebla and Chihuahua as the sole cherry producing states. Production has been steady since 2015. The United States provides over 90 percent of Mexico's cherry imports followed by Chile as a distant second place exporter, and exports are growing steadily.

## Fresh Peaches

### Production

Mexico's peach production is forecast to increase three percent year on year in marketing year (MY) 2024 (January – December) to 266,400 MT based on steady demand. MY 2023 production is estimated at 257,774 MT.

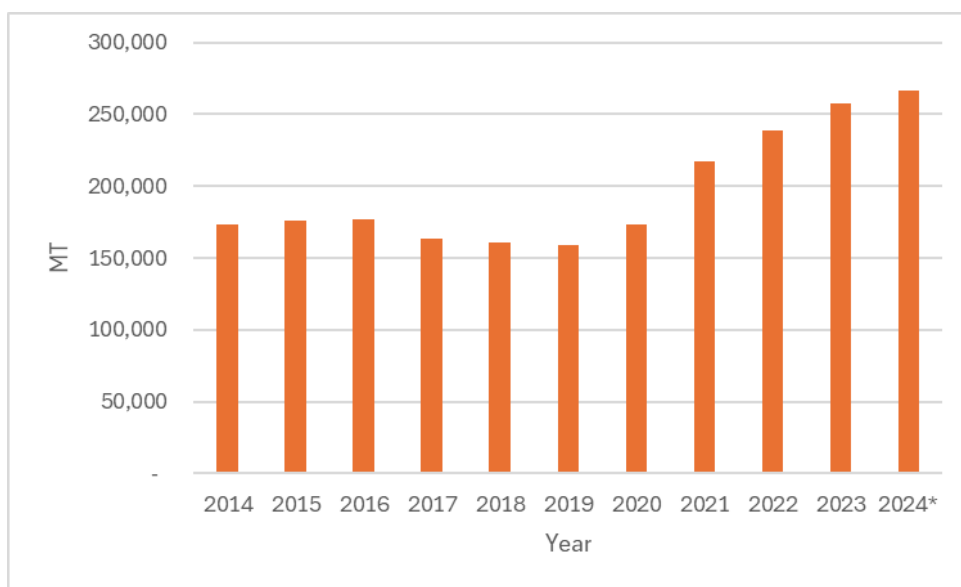
**Table 1: Mexico Peach Area and Production**

Year	Planted Surface (ha)	Harvested Surface (ha)	Production (MT)
2015	35,693	29,539	176,303
2016	32,122	28,846	176,909
2017	31,281	25,579	163,796
2018	28,842	25,562	160,664
2019	28,488	25,203	158,942
2020	33,529	26,091	172,950
2021	33,856	31,440	217,266
2022	34,607	32,945	239,134
2023	34,279	32,253	257,774
2024*	34,183	32,620	266,400

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

\*Post forecast

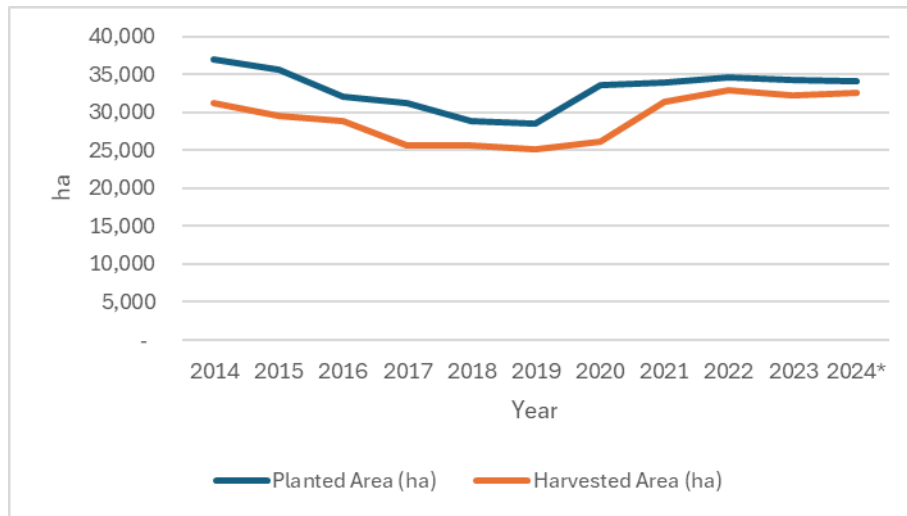
**Graph 1: Mexico Peach Production (MT)**



Data Source: SIAP

\*Post forecast

**Graph 2: Mexico Peach Planted and Harvested Area (hectares - ha)**

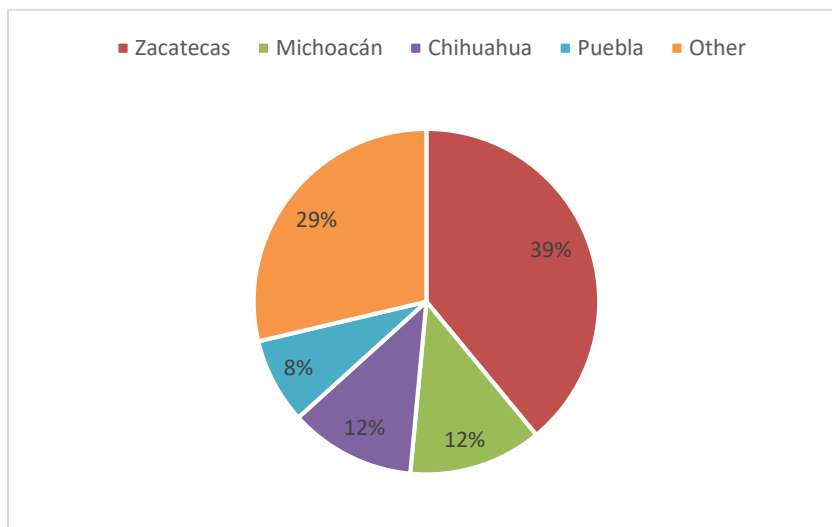


Data Source: SIAP

\*Post forecast

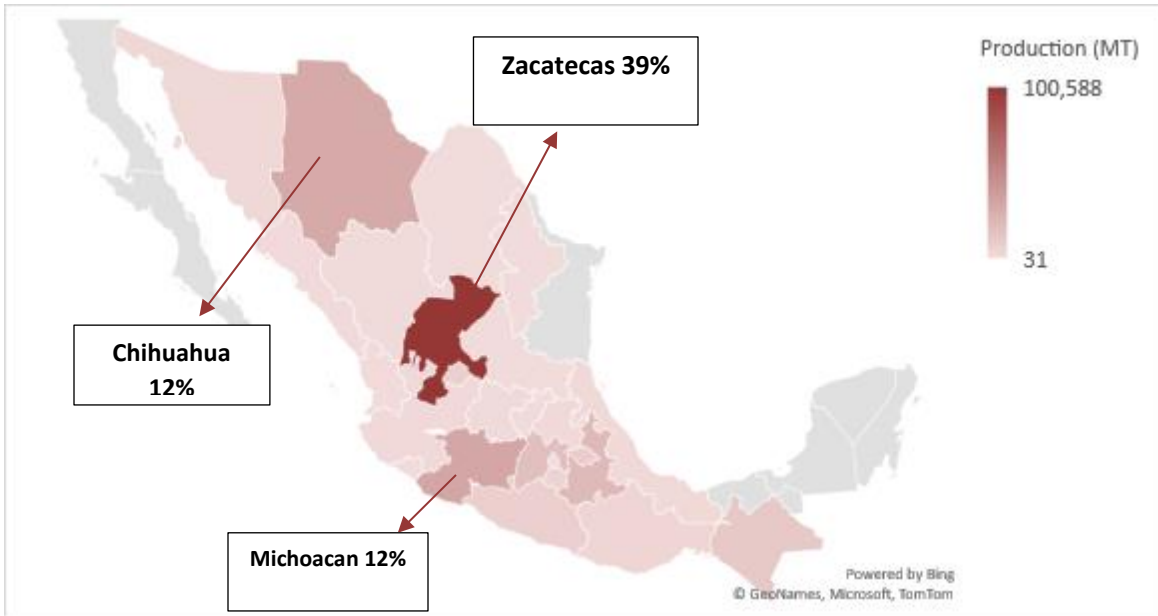
The top four peach producing states account for about 71 percent of production, led by Zacatecas with nearly 40 percent of production, Michoacán and Chihuahua with 12 percent each, and Puebla with eight percent. According to Government of Mexico data, Mexico is the number 11 peach producer globally.

**Graph 3: 2023 Mexico Peach Production by State**



Data Source: SIAP

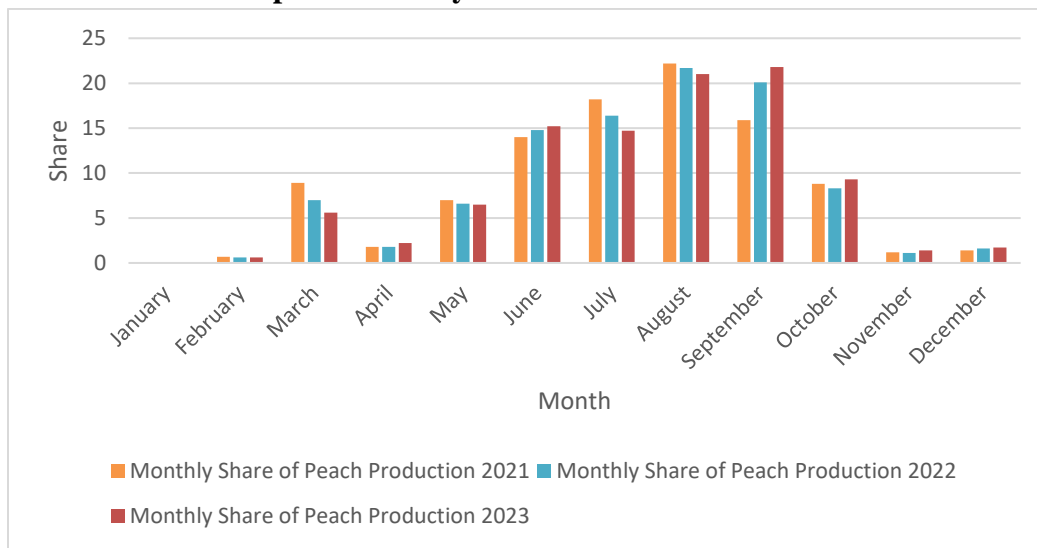
**Map 1: Main Mexico Peach Production Areas 2023**



Data Source: SIAP

Mexico’s peach production seasonality is characterized by a ramp-up in late spring, a peak in summer, and a decline in the fall and winter, influenced by climate conditions and the varieties cultivated. Production peaks during the summer and early fall months, particularly in July, August, and September, which contribute about 15, 22, and 22 percent of annual production, respectively. The summer months from June to September account for over 70 percent of the total production. Production is minimal in the winter months, with no output in January and limited production in November and December.

**Graph 4: Monthly Share of Peach Production**



Data Source: SIAP

## Growing Conditions

Peach production in Mexico is influenced significantly by climate conditions, which present both challenges and opportunities across the country's diverse topography and climate zones. Fluctuating temperatures can lead to insufficient winter chill in certain areas, resulting in erratic blooming and reduced yields, while late spring frosts can damage blossoms, particularly in higher elevation orchards. Additionally, heat stress during the summer months may adversely affect fruit development and quality, especially in warmer regions. Precipitation patterns further complicate production, as dry weather can reduce yield, while excessive rainfall or drought can harm both trees and fruit quality. Regional variations play a crucial role, with states like Chihuahua, which relies on irrigation, being better equipped to handle drought conditions, whereas states like Zacatecas, Michoacan, and Puebla, primarily producing yellow cling peaches, may be more vulnerable to climate fluctuations.

Mexican peaches thrive within specific temperature ranges that vary across the country's diverse microclimates. Ideal conditions include a winter chilling period with temperatures between 32°F and 50°F (0-10°C), providing around 500 chilling hours for proper dormancy break. Spring temperatures should remain above freezing, particularly during the blooming period, to avoid frost damage to tree blossoms. Summer temperatures are optimal when the average of the hottest month falls between 68°F and 86°F (20-30°C), allowing for proper fruit maturation.

The overall growing season benefits from dry, continental, or temperate climates, with different regions in Mexico offering suitable conditions as evidenced by varying harvest seasons: Michoacan from late February to May, Chihuahua from June to September/October, and Zacatecas from late July to October. Higher elevation areas often provide the necessary balance of winter chill, frost-free springs, and moderate summers. Irrigation, as practiced in Chihuahua, can help manage water availability in drier regions. It's crucial to note that specific peach varieties may have different temperature tolerances, emphasizing the importance of selecting appropriate cultivars and adapting cultivation practices to each region's unique climate conditions for successful peach production across Mexico.

The harvest seasons also vary, with Michoacan harvesting from late February to May, Zacatecas from late July to October, and Chihuahua from June to September/October, reflecting the diverse microclimates within Mexico. To address these climate-related challenges, Mexican peach growers may need to develop or adopt varieties with lower chilling requirements and better heat tolerance, implement improved irrigation systems, and use frost protection methods.

In some areas of Mexico, producers use traditional planting and harvest methods that constrain yield increases. In response to federal government programs aimed at increasing fruit yields, some producers of traditional crops such as corn and wheat are starting to shift towards peach production.

Producers depend on pesticides to combat diseases and pests, with such pests as spider mites and leafrollers, among others.

## Consumption

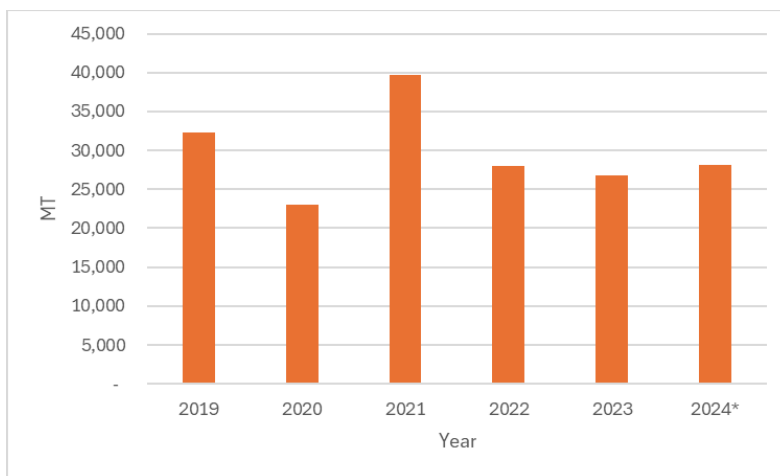
According to Government of Mexico data, Mexico’s annual per capita peach consumption is 2.1 kilograms. Due to the seasonal nature of peach production, the fruit is commonly utilized in jams and syrups as well as in the bakery, salad, and sweets industries.

The majority of peach production is sold at local stores or farmer markets for localized consumption. Consumers traditionally buy fresh peaches during season and depend on imports from the United States to complement domestic production.

## Trade

Post forecasts MY 2024 peach imports at 28,141 MT, a five percent increase compared to the previous marketing year. Mexico predominantly imports peaches from the United States and Chile, with the former accounting for 62 percent of Mexico’s volume peach imports. Mexico is projected to maintain steady peach imports to cover domestic consumption.

**Graph 5: Mexico Peach Imports (MT)**



Data Source: SIAP

\*Post forecast

Mexico’s peach exports are minimal, forecast at 450 MT in MY 2024, down from an estimated 536 MT in MY 2023 based on growing domestic demand. The country’s peach exports have been declining since 2022 and are limited to regional partners such as Belize, Costa Rica, and El Salvador.

## Policy

In 2024, producers from Georgia and South Carolina successfully shipped the first load of peaches from the eastern United States to Mexico since 2014. Market access was achieved in 2015 with the negotiated lifting of an SPS-related ban and the implementation of USDA-approved Electronic Cold-Pasteurization (ECP) treatment. Shipments began in 2024 in response to favorable commercial conditions.

**Table 2: Production, Supply, & Distribution**

<b>Peaches &amp; Nectarines, Fresh</b>	<b>2022/2023</b>		<b>2023/2024</b>		<b>2024/2025</b>	
<b>Market Year Begins</b>	<b>Jan 2022</b>		<b>Jan 2023</b>		<b>Jan 2024</b>	
<b>Mexico</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>
<b>Area Planted (HA)</b>	0	34607	0	34279	0	34184
<b>Area Harvested (HA)</b>	0	32945	0	32523	0	32620
<b>Bearing Trees (1000 TREES)</b>	0	0	0	0	0	0
<b>Non-Bearing Trees (1000 TREES)</b>	0	0	0	0	0	0
<b>Total Trees (1000 TREES)</b>	0	0	0	0	0	0
<b>Commercial Production (MT)</b>	238000	239134	238000	257774	238000	266400
<b>Non-Comm. Production (MT)</b>	0	0	0	0	0	0
<b>Production (MT)</b>	238000	239134	238000	257774	238000	266400
<b>Imports (MT)</b>	28000	27971	29600	26848	35000	28141
<b>Total Supply (MT)</b>	266000	267105	267600	284622	273000	294541
<b>Domestic Consumption (MT)</b>	265900	266990	267100	284086	272800	294091
<b>Exports (MT)</b>	100	114	500	536	200	450
<b>Withdrawal From Market (MT)</b>	0	0	0	0	0	0
<b>Total Distribution (MT)</b>	266000	267104	267600	284622	273000	294541
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						



## Fresh Cherries

### Production

Post forecasts fresh cherry production at 139 MT for CY 2024, a six percent increase over the estimated CY 2023 production of 130 MT. Given Mexico's relatively low level of production, Mexican demand is primarily covered by cherry exports from the United States. Mexico's cherry production is limited to the states of Chihuahua (with 51 percent of production) and Puebla (with the remaining 49 percent).

**Table 3: Mexico Cherry Area and Production**

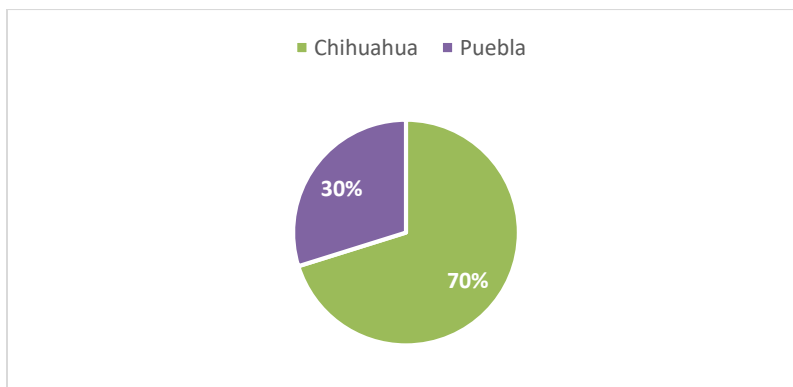
Year	Planted Area (ha)	Harvested Area (ha)	Production (MT)
2015	47	45	148
2016	60	55	207
2017	31	31	72
2018	51	48	178
2019	47	39	92
2020	48	48	144
2021*	40	40	142
2022	36	33	145
2023	39	38	130
2024**	43	37	139

Data Source: SIAP

\*Post estimate. No official data available.

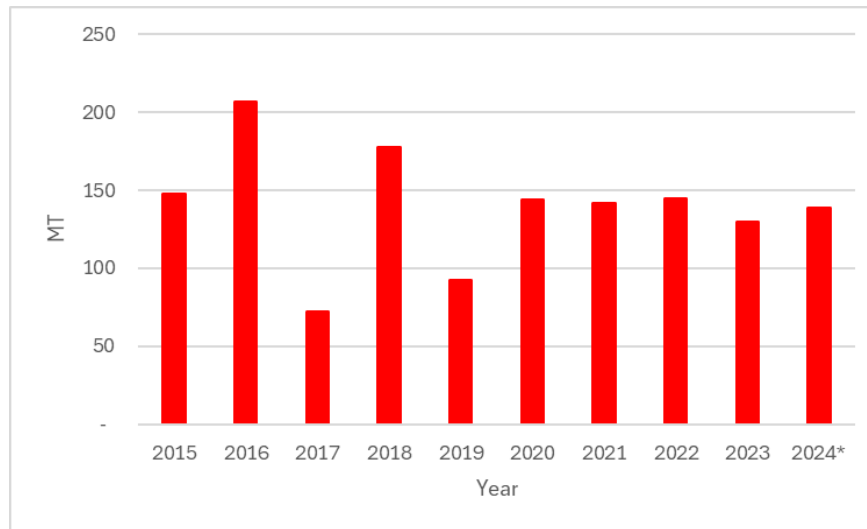
\*\*Post forecast

**Graph 6: 2023 Mexico Cherry Production by State**



Data Source: SIAP

**Graph 7: Mexico Cherry Production (MT)**



Data Source: SIAP

\*Post estimate

Each cherry tree produces an average of 3 kilograms (6.6 pounds) during one season per year. The cherry production season in Mexico typically runs from June to August, although the season sometimes extends into September in some parts of Puebla.

### **Growing Conditions**

Cherry production in Mexico faces unique challenges due to its climate, which is generally not ideal for traditional cherry varieties. The ideal temperatures for growing cherries include winter temperatures between 32°F and 45°F (0-7.2°C) to ensure sufficient chilling hours, typically around 800-1,000 hours for sweet cherries. A frost-free spring is crucial to protect blossoms during the flowering stage, as frost can significantly damage potential yields. In summer, moderate temperatures are preferred, ideally not exceeding 85°F (29°C) to promote healthy growth. Much of Mexico's climate is warmer than what cherries typically require, making it difficult to cultivate them successfully.

Mexican cherry production remains underdeveloped and presents numerous challenges, particularly due to the altitude required for optimal growing conditions. While cherries thrive in specific climatic environments, production is scarce and scattered across mountainous areas. Most producers are focused on supplying local markets, with many utilizing their harvest in local byproducts such as preserves, wine, and jam. Additionally, sunlight significantly affects cherry tree health, leading producers to seek areas with high humidity, low sunlight, and cooler temperatures, typically around 59°F. To sustain themselves during the cherry off-season, many producers also plant other crops such as corn, berries, and avocados. As a result, local producers primarily focus on the domestic market, while consumer demand is often met through imports from the United States.

## Consumption

Mexico's cherry demand has seen significant growth in recent years, with production experiencing minimal growth but imports increasing year by year. Most cherry sales are concentrated in major cities like Mexico City and Guadalajara, where around 60% of the market is located. Notably, over 90% of the cherries consumed in Mexico are imported, primarily from the United States, while domestic production is quite limited, estimated at around 10,000 boxes annually, mainly from Chihuahua and Puebla. The cherry sales season in Mexico lasts about 14 weeks, typically starting in mid-June and extending until the middle of September. Despite the growth in consumption, the per capita consumption of cherries in Mexico remains relatively low; however, the upward trend indicates a growing interest among Mexican consumers in this fruit, driven by its health benefits and unique flavor.

In addition to fresh market sales, cherry producers in Mexico creatively utilize their harvest to produce a variety of value-added products, such as wine, preserves, and jams. These products not only help maximize profits but also enable producers to capitalize on the unique flavors of their cherries. The crafting of cherry wine allows producers to tap into niche markets, attracting consumers looking for artisanal and locally sourced beverages. Meanwhile, preserves and jams made from cherries offer options for the local consumers.



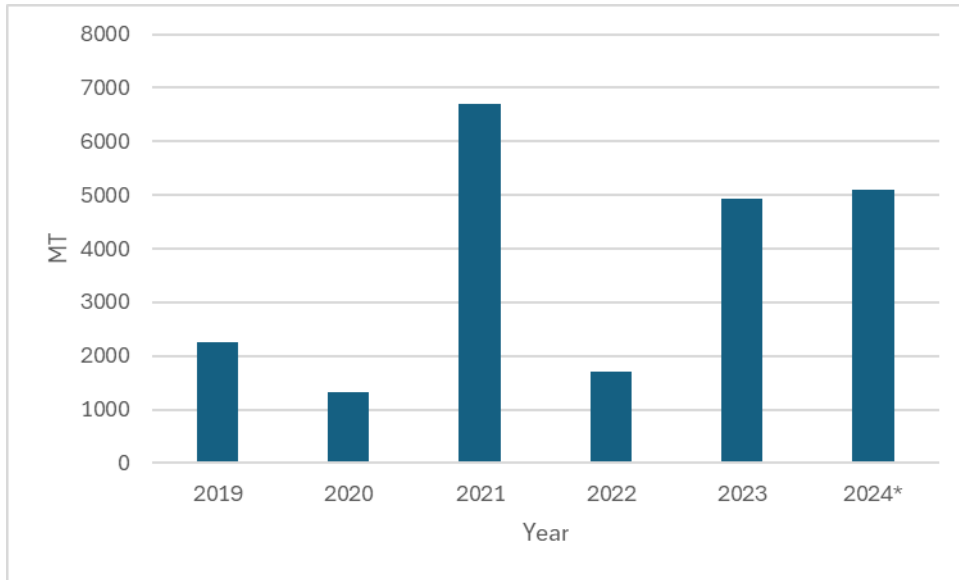
Cherry products made by local producers for the domestic market

## Trade

Post forecasts Mexico's CY 2024 cherry imports at 5,110 MT, a four percent increase from the previous year. Estimated CY 2023 imports totaled 4,923 MT. Mexico depends on the international market to fulfill its cherry demand, importing 90 percent of its fresh cherries from the United States and the

remaining 10 percent from Chile. Imports do not occur year-round but are aligned to each region’s specific climates, with Chile exporting in the first parts of the year and the United States from May through September.

**Graph 8: Mexico Cherry Imports (MT)**



Data Source: TDM

\*Post estimate

Although Mexico is a leading exporter of fresh fruits such as berries, it does not export fresh cherries due to its minimal production and growing domestic consumption.

**Attachments:**

No Attachments.