

Voluntary Report – Voluntary - Public Distribution

Date: August 20, 2026

Report Number: MX2026-0042

Report Name: Stone Fruit Annual

Country: Mexico

Post: Guadalajara

Report Category: Stone Fruit

Prepared By: Manuel Mandujano

Approved By: Abigail Mackey

Report Highlights:

Mexico's 2026 peach production is forecast at 255,000 metric tons, a five percent decrease over 2025. This decline is largely driven by adverse weather conditions and stagnant domestic demand. Peach imports are forecast to grow seven percent in 2026, with the United States maintaining a dominant market share. Mexico's domestic sweet cherry production remains highly constrained. The United States provides over 80 percent of Mexico's cherry imports.

Fresh Peaches

Table 1: Production, Supply, & Distribution

Peaches & Nectarines, Fresh Market Year Begins Mexico	2024/2025		2025/2026		2026/2027	
	Jan 2024		Jan 2025		Jan 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	0	34183	0	33814	0	33000
Area Harvested (HA)	0	32620	0	32525	0	31000
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)	266400	266400	266400	268069	0	255000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	266400	266400	266400	268069	0	255000
Imports (MT)	30500	28141	30000	35623	0	38000
Total Supply (MT)	296900	294541	296400	303692	0	293000
Domestic Consumption (MT)	296600	294091	296200	303542	0	292950
Exports (MT)	300	450	200	150	0	50
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	296900	294541	296400	303692	0	293000
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production

Mexico’s peach production is forecast to decrease five percent in calendar year (CY) 2026 to 255,000 metric tons (MT). This decline in production is largely due to adverse weather patterns and stagnant national consumption.

Early-year heavy frosts and late-spring hailstorms in 2026 across key producing states in Mexico have caused localized crop losses and quality issues. For the past two years, peach producers in central Mexico have faced an escalating, atypical weather pattern marked by unseasonally dry-season rains and humid winters that cause severe frostbite and decimate open-sky production. This compounding sequence of moisture-saturated soils followed by sudden sub-freezing drops became acutely disruptive in the 2026 crop cycle, destroying water-logged floral buds and creating ideal breeding grounds for pests and fungal diseases. Because open-air orchards lack shielding, they absorb the full brunt of these structural anomalies.

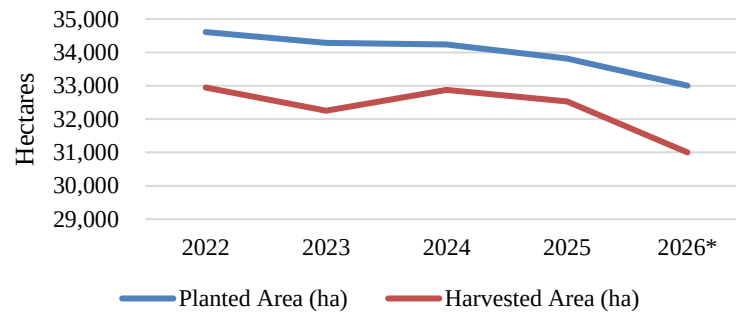
Table 2: Mexico Peach Area and Production

Year	Planted Area (Ha)	Harvested Area (Ha)	Production (MT)
2022	34,607	32,945	239,134
2023	34,279	32,253	257,774
2024	34,233	32,876	265,222
2025	33,814	32,525	268,068
2026*	33,000	31,000	255,000

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

*Post forecast

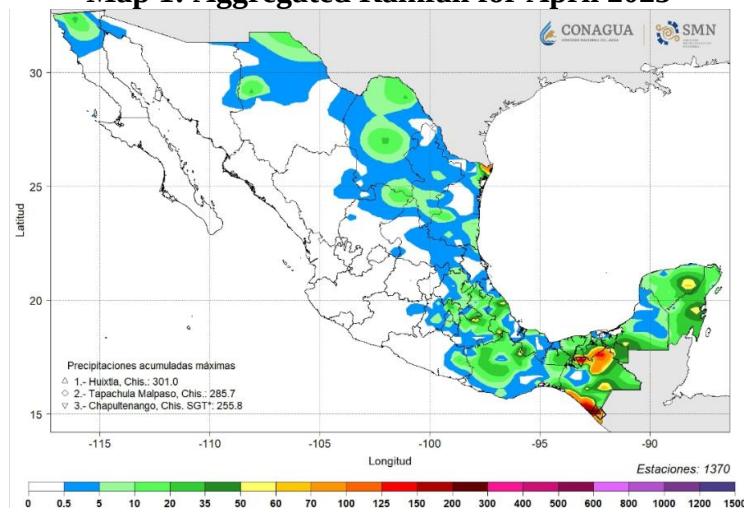
Graph 1: Mexico Peach Planted and Harvested Area (HA)



Data Source: SIAP

*Post forecast

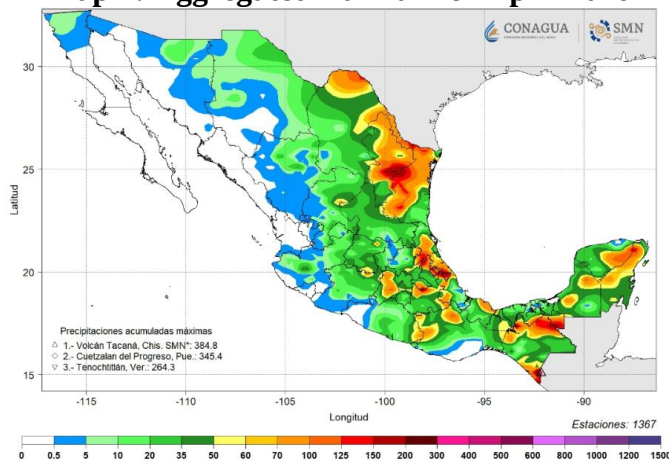
Map 1: Aggregated Rainfall for April 2025



Source: Mexican National Water Commission

Legend: From left to right on scale above, white represents low rainfall and purple represents high rainfall

Map 2: Aggregated Rainfall for April 2026



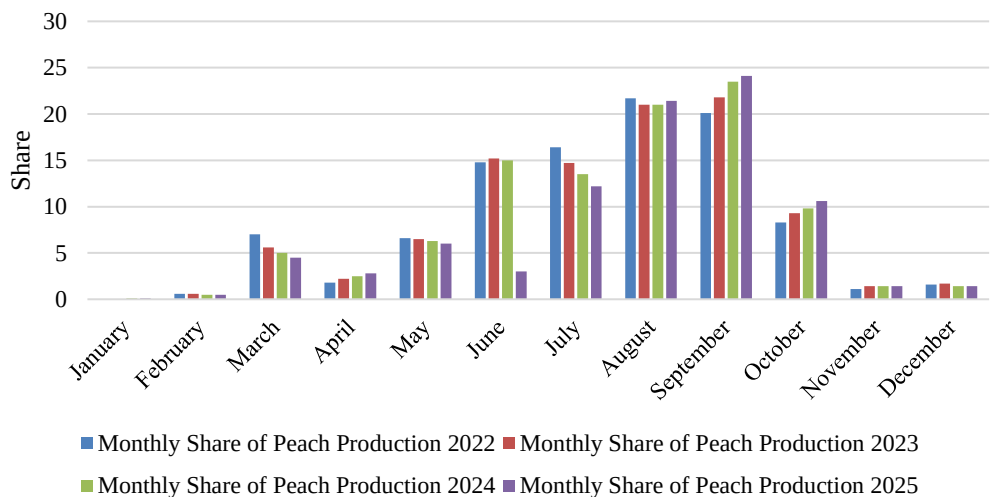
Source: Mexican National Water Commission

Legend: From left to right on scale above, white represents low rainfall and purple represents high rainfall

Mexico’s peach production is characterized by a ramp-up in late spring, a peak in late summer, and a sharp decline in the fall and winter, influenced by climate conditions and the varieties cultivated. Production peaks heavily during the summer and early fall months, particularly in July, August, and September, which contribute roughly to 70 percent of the year’s production. Production remains minimal in the winter months, with nearly zero output in January and limited contributions in November and December.

The top three peach producing states in Mexico account for an estimated 61 percent of production, led by Zacatecas with 32 percent of production, Michoacán with 15 percent, and Chihuahua with 14 percent. On average, peach growers obtain between 8.2 and 8.7 MT per hectare.

Graph 2: Monthly Share of Annual Peach Production (percentage in quantity terms)



Data Source: SIAP

Peach production in Mexico is shaped by diverse regional climates, temperature ranges requiring approximately 500 chilling hours between 32°F and 50°F, and distinct harvest schedules. Regional variations heavily dictate management, with Chihuahua relying on structured irrigation to handle drought, while Zacatecas, Michoacán, and Puebla have unique microclimates ranging from semi-arid conditions to humid mountainous zones prone to late frosts and winter storms.

Peach variety and seasonal dynamics vary significantly across these key states. Michoacán utilizes warmer transition zones to achieve early-season harvests from late February to May, whereas Chihuahua runs its harvest from June to September/October. The harvest season for Zacatecas spans from late July to October, primarily producing yellow cling and regional varieties.

Producers adapt their practices to combat regional pest pressures, such as spider mites and leafrollers while managing varying temperature variations. To address ongoing climate-related challenges like erratic blooming, heat/cold stress, and recent weather anomalies such as unseasonal freezes and hailstorms, growers are increasingly adopting improved irrigation systems and frost protection methods.

Photo 1: Open Skies Peach Production in Central Mexico (Puebla)



Photo source: FAS Mexico City

Post estimates CY 2025 peach production at 268,068 MT, a slight increase over 2024 production. Following years of localized weather volatility and lingering drought pressures that impacted orchard health, 2025 production benefited from more balanced seasonal rainfall patterns and consistent orchard management, especially in key areas like Zacatecas.

Consumption

Post forecasts domestic consumption for CY 2026 at 292,950 MT, a three percent decrease from CY 2025. While reduced domestic production is expected to increase imports from international markets, imported peaches are often priced higher than domestic product.

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

Photo 2: Sale of Fresh Peaches in Local Market in Central Mexico (Puebla)

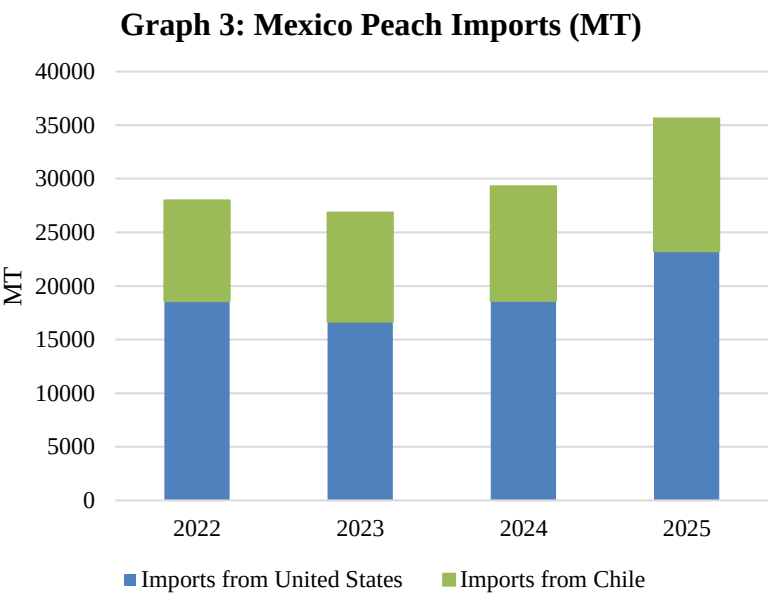


Photo source: FAS Mexico City

Trade

Post forecasts Mexico’s fresh peach imports to reach 38,000 MT for CY 2026, a seven percent increase. This continues a strong upward trajectory in peach imports over the past several years.

Mexico predominantly imports peaches from the United States and Chile. In 2025, the United States controlled the Mexican import market share with 65 percent of peach imports by volume.



Data Source: SIAP
**Post forecast*

Mexico’s peach exports continue to decline, remaining limited to regional partners in Central America such as Belize, Costa Rica, and El Salvador. Given the adverse weather conditions experienced in early 2026 and abnormal frosts across key production zones, export volumes are forecasted to remain minimal.

Policy

Peaches coming from the United States and Chile enjoy a zero percent tariff when exported to Mexico due to respective free trade agreements.

Fresh Cherries

Production

Post forecasts fresh cherry production at 130 MT for CY 2026, a four percent decrease. Given Mexico’s relatively low level of production, Mexican demand is primarily covered by cherry imports from the United States.

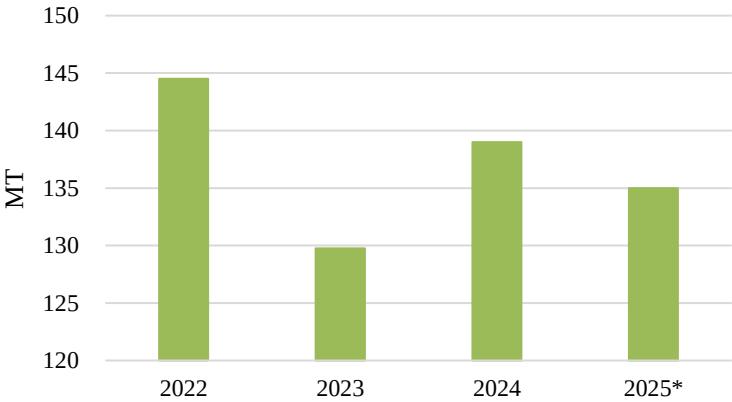
Mexico’s cherry production is limited to the states of Chihuahua (with 55 percent of production) and Puebla (with the remaining 45 percent). Each cherry tree produces an average of 3 kilograms (6.6 lbs) during one season per year. The cherry production season in Mexico typically runs from June to August, although the season sometimes extends into September in some parts of Puebla.

Table 3: Mexico Cherry Area and Production

Year	Planted Area (ha)	Harvested Area (ha)	Production (MT)
2022	36	33	145
2023	39	38	130
2024	43	37	139
2025*	40	35	135
2026**	40	32	130

Data Source: SIAP
**Post estimate. No cherry data available.*
***Post forecast*

Graph 4: Mexico Cherry Production (MT)



Data Source: SIAP
**Post estimate*

Cherry production in Mexico faces severe climatic constraints, as the country’s general weather patterns fall outside the optimal range required for traditional varieties. Sweet cherries typically demand 800 to 1,000 winter chilling hours between 32°F and 45°F to break dormancy, alongside a frost-free spring to protect delicate blossoms. Furthermore, summer temperatures should ideally remain below 85°F to foster healthy growth. Because much of Mexico features a warmer climate, cultivating cherries successfully is a persistent challenge.

Mexican cherry production is restricted to scarce, scattered pockets across higher-altitude mountainous regions. Growers actively search for unique microclimates featuring high humidity, lower sunlight exposure, and cooler ambient temperatures around 59°F. Even in these elevated areas, output remains

low and underdeveloped, with most small-scale producers relying on agricultural diversification, such as planting corn, forage, and some berries, to sustain their livelihoods.

Local production is primarily geared toward the domestic market, with many growers utilizing their harvest to craft artisanal byproducts like preserves, jams, and wine. Because domestic supply cannot keep up with local appetite, most of the consumer demand throughout Mexico continues to be met via commercial imports, predominantly sourced from the United States.

Consumption

For CY 2026, Post forecasts cherry consumption at 9,430 MT, a 5 percent increase from CY 2025. The presence of year-round cherries from both U.S. and Chilean sources has made it easier for consumers to access the fruit, while rising health-consciousness and demand for nutrient-dense produce have boosted purchase frequencies. As global exporters like the United States and Chile pursue secondary markets, increasing retail visibility and enhanced access across digital and modern grocery channels is helping boost demand.

Sweet and sour cherries remain a premium product for most Mexican consumers, with demand concentrated among middle- and higher-income households. Most imported fresh cherries can be found in specialty supermarket chains across Mexico.

Photo 3: U.S. Cherry Promotion at Supermarket in Guadalajara



Photo source: FAS Mexico

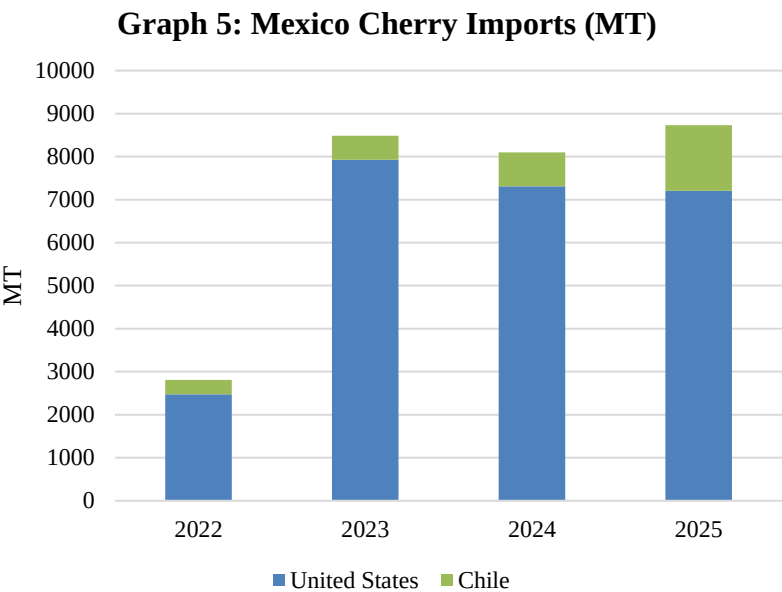
Trade

Post forecasts Mexico's CY 2026 cherry imports at 9,300 MT, a seven percent increase from the previous year. CY 2025 imports totaled 8,728 MT, an eight percent increase compared to CY 2024. Mexico relies on the international market to fulfill its cherry demand, importing in CY 2025 over 83

percent of its fresh cherries from the United States and the remaining 17 percent from Chile. Imports do not occur year-round but are aligned to each region’s specific climates, with imports entering from the United States from May through September and from Chile in the later part of the year and beginning of the winter (November through March).

Chilean cherry exports to Mexico have surged due to the country’s own domestic production increases, helping Chile’s ability to fill Mexico's off-season winter window when local supplies are unavailable.

Mexico represents close to 10 percent of U.S. cherry exports, making it a convenient market for summer cherry production, especially from the Northwest.



Data Source: TDM
**Post estimate*

Mexico does not export fresh cherries due to its minimal production and growing domestic consumption.

Policy

Cherries coming from the United States and Chile enjoy a zero percent tariff when exported to Mexico due to respective free trade agreements.

Attachments:

No Attachments.