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The US Strawberry Industry: An Overview of Production and Trade[1]

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Introduction

Fresh strawberries are a high-value specialty crop and among the most widely consumed fruits in the United States. In 2023, US fresh strawberry production was valued at $3.3 billion, accounting for 18% of the total value of all fruit production (USDA-NASS 2025; USDA-ERS 2025).

Since 2000, US strawberry production volume has increased by 83%, driven primarily by growth in California, the nation's leading strawberry-producing state. However, imports have expanded at a much faster pace, growing nearly seven-fold over the same period. This surge has been fueled by rising US consumer demand, cost advantages, and favorable agricultural policies in Mexico, which supplies nearly all US strawberry imports (Huang et al. 2022).

As a result, the United States shifted from being a net exporter to a net importer of fresh strawberries in 2012. The sharp rise in imports reflects growing competitive pressure from Mexico, now the dominant supplier of US fresh fruit and vegetable imports (Li et al. 2025). In 2024, Mexico's net exports of fresh fruits and vegetables to the United States reached $17.7 billion. This rapid trade expansion has fundamentally reshaped domestic markets across a wide range of crops (Huang et al. 2022), including strawberries (Suh et al. 2017), blueberries (Wu and Guan 2021; Soto-Caro et al. 2023; Hammami et al. 2024), tomatoes (Li et al. 2022), peppers (Biswas et al. 2018a; Soto-Caro et al. 2023; Hammami et al. 2024), and squash and cucumbers (Wu et al. 2022).

This article provides an overview of strawberry production and trade and key challenges facing the US strawberry sector. It aims to help growers and policymakers better understand shifting market dynamics and identify pathways for sustainable growth.

US Fresh Strawberry Production

US fresh strawberry production has expanded significantly over the past 25 years. As shown in Figure 1, production increased by 83%, rising from 1.4 billion pounds in 2000 to 2.6 billion pounds in 2024. Notably, while production rose to 2.5 billion pounds in 2013, it declined steadily through 2019, when it reached a low of 1.9 billion pounds. This decline was primarily driven by reduced acreage in California, the largest domestic strawberry-producing state (USDA-ERS 2023). However, since 2020, production has rebounded and surpassed its previous peak in 2024.

Production in California and Florida together account for nearly all of the domestic supply. California remains the dominant producer, supplying approximately 85% of US production in 2024, while Florida follows with around 13%. All other states combined contribute only about 2% of domestic production. California produces most of its strawberries in the summer season; Florida primarily supplies the winter market (Huang et al. 2022). Since 2000, both California and Florida have experienced production growth. Specifically, California's output has increased by 94%, rising from 1.2 billion pounds in 2000 to over 2.2 billion pounds in 2024. Florida's production has grown by 51%, from 220 million pounds to 332 million pounds during the same period. Notably, Florida's acreage increased from 6,300 to 16,200 over this period (Figure 2), representing more than 150% growth, in stark contrast to other major specialty crops in the state, such as tomatoes, which have experienced significant declines in both production and acreage. The strawberry acreage in California increased from 27,600 in 2000 to 45,300 in 2024, a gain of more than 60%. The US total acreage increased from 48,600 to 61,500 during the period.

Strawberries are the most labor-intensive large-acreage crop grown in the United States (UC Davis 2021). Fields are typically picked twice a week during the harvest season, demanding a large and timely labor force. California requires an estimated 50 to 60 thousand workers each season to meet harvest demands (UC Davis 2021); and the Florida industry employs approximately 20 thousand workers annually to support winter production (Biswas et al. 2018b). Labor is the single largest expense for strawberry farmers, accounting for over 45% of production costs depending on farm practices.

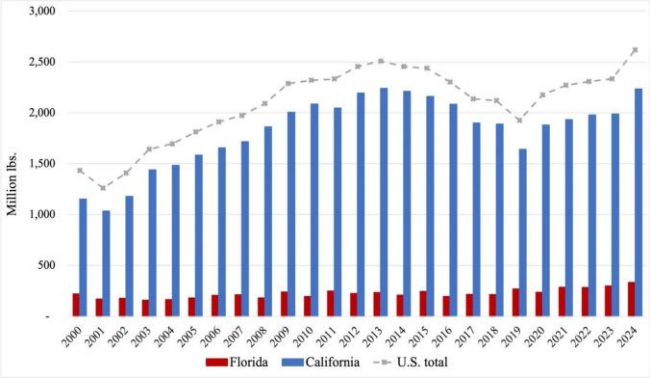


Figure 1. US strawberry production by state, 2000–2024. US strawberry production rose 83% since 2000, with California being dominant and Florida growing steadily to about 13% of supply.
Credit: USDA-NASS, 2025.

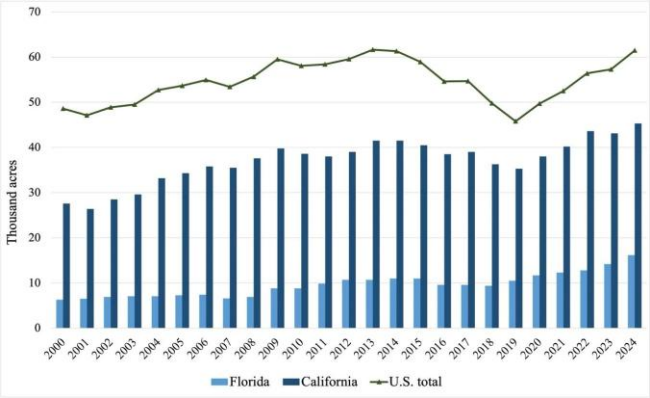


Figure 2. US strawberry acreage by state, 2000–2024. Florida's planted acreage more than doubled since 2000, the fastest expansion of any major producer.
Credit: USDA-NASS, 2025.

Figure 3 illustrates price trends over time. The domestic average retail price for US fresh strawberries increased from $1.90 per pound in 2000 to $3.50 in 2023. Beyond general inflation, this increase was partly driven by growing domestic consumer awareness of the health benefits of berries, which boosted overall demand (USDA-ERS 2023). Grower prices followed a similar upward trend, rising from $0.70 per pound in 2000 to around $1.80 in recent years. During the COVID-19 pandemic, grower prices jumped significantly, from $1.10 to $1.80 per pound, narrowing the gap between retail and grower prices. Retail prices did not increase as sharply, possibly due to increased imports from Mexico that helped stabilize the supply shocks, while retailers absorbed part of the cost increases.

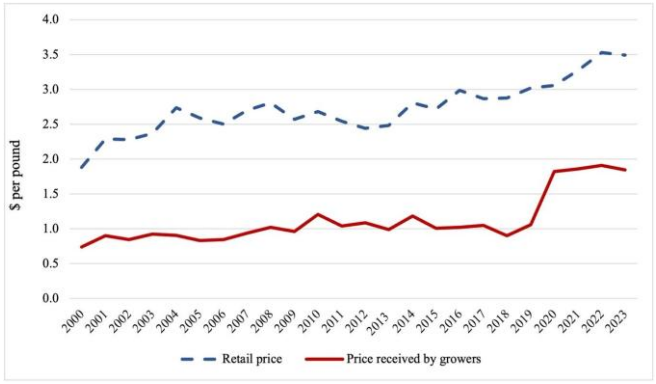


Figure 3. US fresh strawberry average national retail price and grower price, 2000–2023. Retail and grower strawberry prices both rose since 2000, with grower prices spiking during COVID-19 to narrow the gap.
Notes: 1. The 2013 grower price data point was missing and was estimated by the authors using the average of the preceding and following years. 2. Prices are simple 12-month averages of US fresh strawberry prices. Retail prices represent national monthly averages, while grower prices are adjusted for an estimated 8% loss due to spoilage and waste during marketing.
Credit: USDA-ERS, 2025.

US Fresh Strawberry Trade

Figure 4 illustrates US imports and exports of strawberries over the past 25 years. During this period, the United States became the world's largest importer of strawberries. Import volumes grew more than six-fold, rising from 76 million pounds in 2000 to 585 million pounds in 2024. Over the same period, US exports of fresh strawberries also expanded, though at a slower pace, rising from 137 million pounds in 2000 to 357 million pounds in 2024, an increase of approximately 160%. As import growth outpaced export growth, the overall trade balance shifted notably, with the United States becoming the net importer in 2012.

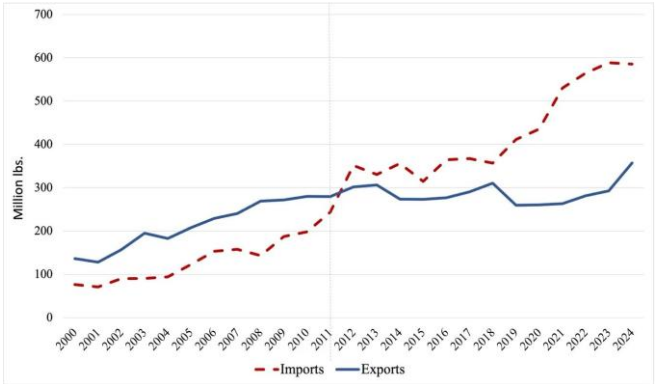


Figure 4. US fresh strawberry trade, 2000–2024. Imports grew far faster than exports, turning the US into a net importer of strawberries in 2012.
Credit: USDA-FAS, 2025.

Figure 5 illustrates the trends in US fresh strawberry imports by origin from 2000 to 2024, alongside Florida production. Mexico is the dominant source of imported strawberries, supplying an average of 99% of total US strawberry imports during this period. Imports from Mexico rose sharply from 73 million pounds in 2000 to 572.2 million pounds in 2024. While imports from other countries (e.g., Canada) also increased, from 3.2 million pounds in 2000 to 13.2 million pounds in 2024, their overall share remains negligible.

The rapid expansion of Mexican imports has been driven by several advantages, including lower labor costs and favorable government policies (Suh et al. 2017; Wu et al. 2018a). The removal of US tariffs under the North American Free Trade Agreement (NAFTA) in 1994 further eased access to the US market (Suh et al. 2017). These factors have contributed to the fast-growing imports, intensifying competition for domestic farmers. Florida has been especially impacted, as Mexico's peak harvest season overlaps directly with Florida's winter production window. While Florida's strawberry production did expand, it grew at a much slower pace. Florida production is also vulnerable to hurricanes. While most storms historically caused limited disruption, Hurricanes Helene and Milton in 2024 struck during peak planting season, inflicting major damages (Court et al. 2025). With climate change expected to bring more frequent and intense storms, the production risk for Florida strawberry industry will likely increase.

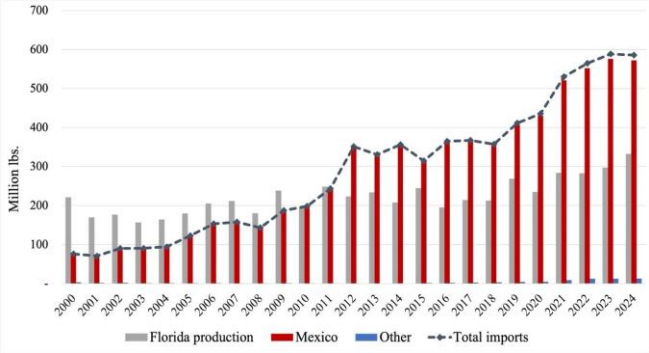


Figure 5. US fresh strawberry imports and Florida production, 2000–2024. Mexican imports surged to nearly all US imports, outpacing Florida's slower production growth. *Note:* Hurricanes that caused losses to Florida strawberry production include 2004 (Charley, Frances, Ivan, Jeanne); 2017 (Irma); 2022 (Ian); and 2024 (Helene, Milton).
Credit: USDA-FAS, 2025; USDA-NASS, 2025.

Figure 6 shows that US fresh strawberries are primarily shipped to Canada and Mexico. Canada has consistently been the top export destination, receiving 60% of total US strawberry exports in 2024. Mexico has become the fastest-growing market and the second largest, accounting for 27.7% of exports. Smaller volumes are also sent to other countries, such as Saudi Arabia.

Over the past two decades, US fresh strawberry export volumes to Canada have doubled, while shipments to Mexico have increased more than fivefold. Notably, US exports to Mexico nearly doubled in the past two years, rising from 50.8 million pounds in 2022 to 99.0 million pounds in 2024. This sharp growth may reflect rising consumer demand in Mexico and the complementary timing of harvest seasons. While Mexico largely supplies strawberries to the United States during winter and early spring, California can export strawberries back to Mexico from late spring through fall, when Mexico's own production typically declines.

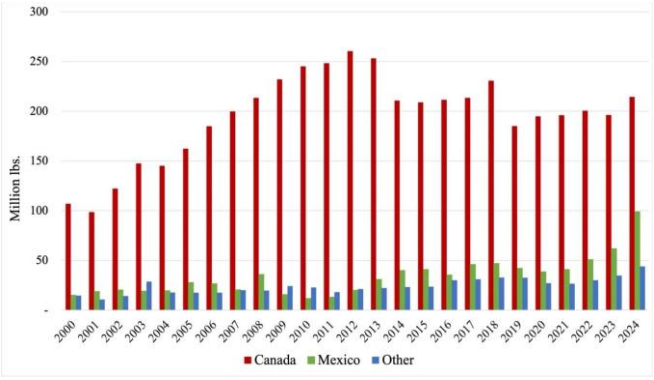


Figure 6. US fresh strawberry exports destinations, 2000–2024. Canada remains the top export market, while Mexico is the fastest growing.
Credit: USDA-FAS, 2025.

Discussion and Concluding Remarks

US strawberry growers are facing increasing production and market challenges. In addition to pest and disease management difficulties following the methyl bromide ban (Cao et al. 2019), labor shortages and rising wage pressures are among the most pressing issues in both California and Florida (Guan et al. 2018; Biswas et al. 2018b; Hammami et al. 2025). Labor accounts for a large share of total production costs, and growers have found it increasingly difficult to find sufficient domestic workers, forcing them to rely on the more costly foreign guest workers under the H-2A visa program.

While the H-2A program helps address labor shortages, it remains costly and cumbersome. Beyond the bureaucratic and uncertain application process, growers often cite the free housing requirement and elevated wage obligations as the most burdensome elements. Employers must pay the Adverse Effect Wage Rate (AEWR), a mandated wage floor set above local market rates to protect domestic workers, and must provide housing at no cost. These requirements create substantial logistical and financial challenges. These high compliance costs reveal a fundamental policy contradiction: the program is intended to supply needed labor, yet its rules are designed to deter and discourage its use—to "protect" a domestic workforce that is largely absent or unwilling to take farm jobs.

Although several immigration reform proposals have been introduced in Congress, such reforms would only ease, not eliminate, the burden on growers. They cannot resolve the fundamental cost disadvantage the US strawberry industry faces compared to Mexico, where labor costs remain far lower for this labor-intensive crop (Wu et al. 2018a). Over the longer term, sustained competitiveness will depend on investments in mechanization and labor-saving technologies. Advances in breeding and genetics can also help mitigate competitive pressure by elevating product quality and enabling differentiation strategies that emphasize flavor, sustainability, and other valued attributes. Coordinated efforts among growers, researchers, and policymakers will be essential for industry sustainability and growth.

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