



United States Department of Agriculture

# U.S. Produce Imports from Mexico

**Linda Calvin and Steven Zahniser**  
**U.S. Department of Agriculture**  
**Economic Research Service**

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# U.S.-Mexico fruit and vegetable trade at a glance

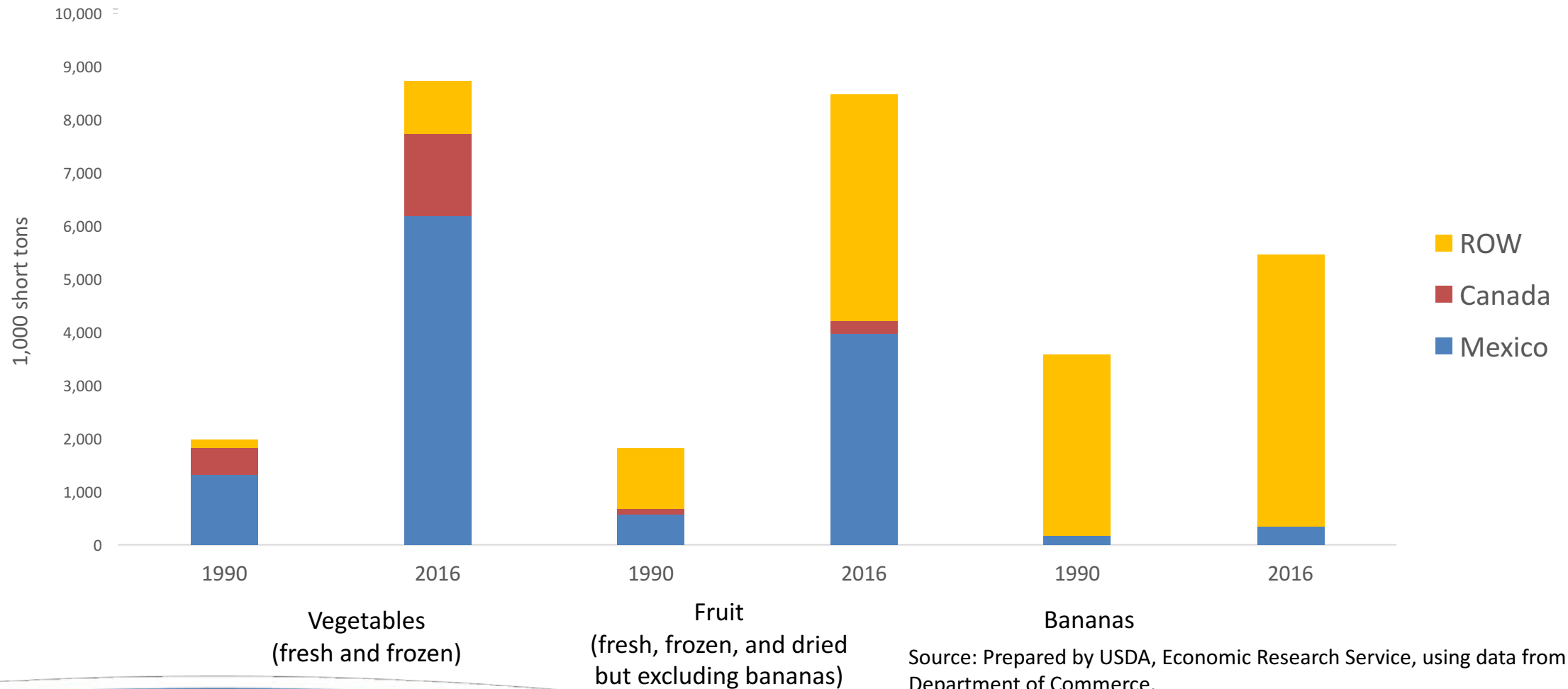
- In 2016, U.S. fruit and vegetable imports from Mexico reached about 10 million metric tons—with a total value of about \$12.4 billion.
- This trade accounted for about:
  - 43 percent of total U.S. fruit and vegetable imports (from all countries)
  - 54 percent of U.S. agricultural imports from Mexico
  - 4 percent of U.S. merchandise imports from Mexico
- In this presentation, we will focus on different types of *fresh or frozen* fruit and vegetables, which accounted for about 92 percent of U.S. fruit and vegetable imports from Mexico in 2016.
- The United States also participates in U.S.-Mexico agricultural trade as an exporter:
  - U.S. agricultural exports to Mexico equaled about \$17.8 billion in 2016.
  - Grains, oilseeds, meat, and related products accounted for about three-fourths of this trade.
  - Fruit and vegetables accounted for about 7 percent.

Source: Prepared by USDA, Economic Research Service, using data from U.S. Census Bureau, as cited by USDA, Foreign Agricultural Service.

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# U.S. produce imports: Mexico is the largest foreign supplier of vegetables and fruit (when bananas are excluded)



Source: Prepared by USDA, Economic Research Service, using data from U.S. Department of Commerce.

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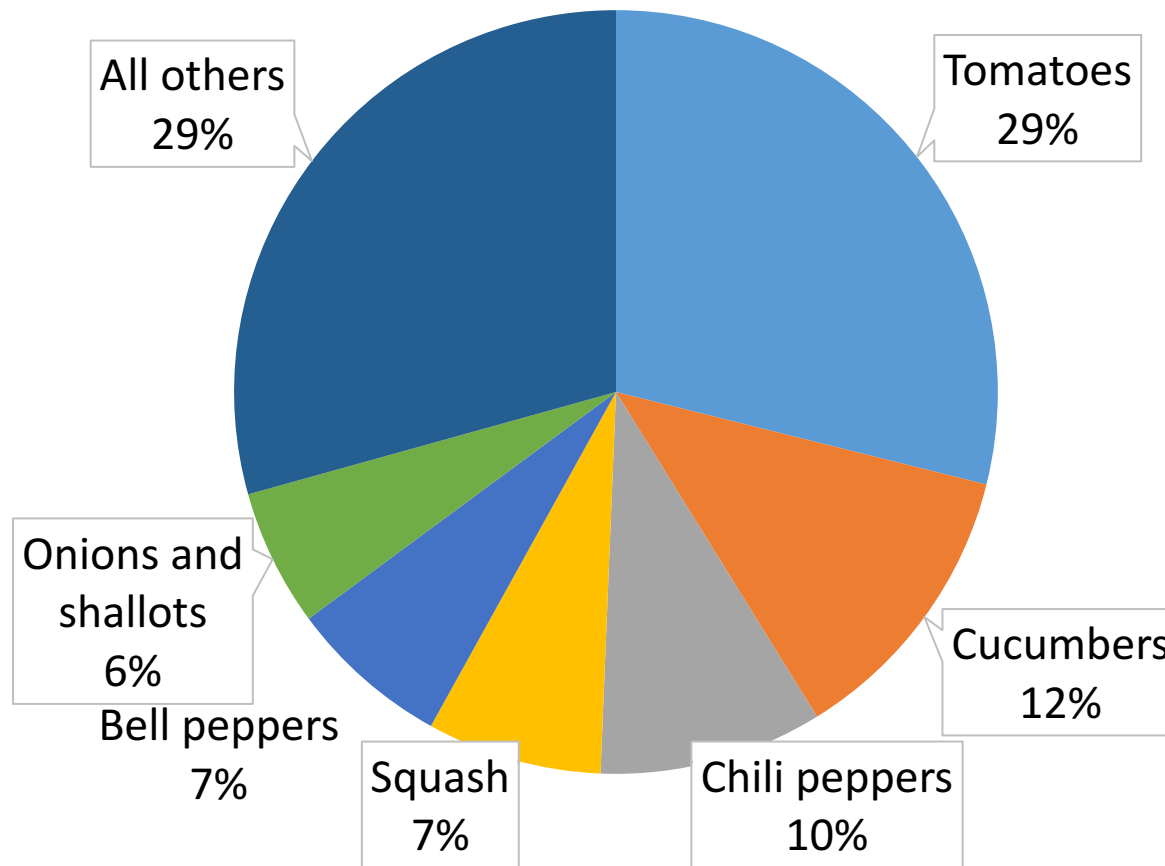
# Availability of farm labor in Mexico is one of many factors driving U.S. produce imports

- Demand
  - Consumer demand for year-round supplies of fresh produce
  - A desire for a healthier diet
  - Partial shift in consumption from canned and frozen product to fresh produce
  - Increased per capita consumption of certain fruit and vegetables
  - New interest in tropical fruit (avocados, papayas, mangos)
- Supply
  - Favorable climates in other countries for growing fruit and vegetables, often complementing U.S. growing seasons
  - Greater availability of farm labor in Mexico and other countries
  - Trade liberalization (NAFTA, CAFTA-DR, Peru, Colombia)
  - Regulatory coordination and trade facilitation (changes in phytosanitary rules for avocados form one example)
  - New technologies (protected cultures, including greenhouses and shade houses, and new varieties, among other factors)
  - New commodities grown in Mexico (berries)
  - Food safety challenges (raspberries, cantaloupe)
  - New transportation infrastructure reduces transport costs from some areas: Increased use of Laredo and Weslaco Ports of Entry
  - Increased participation of U.S. producers, buyers, and investors in produce sectors of Mexico and other countries as a way to reduce weather risks, to obtain product to “fill out” the calendar year, and to lower labor costs

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# Tomatoes: The leading U.S. vegetable import from Mexico in 2016 (volume)

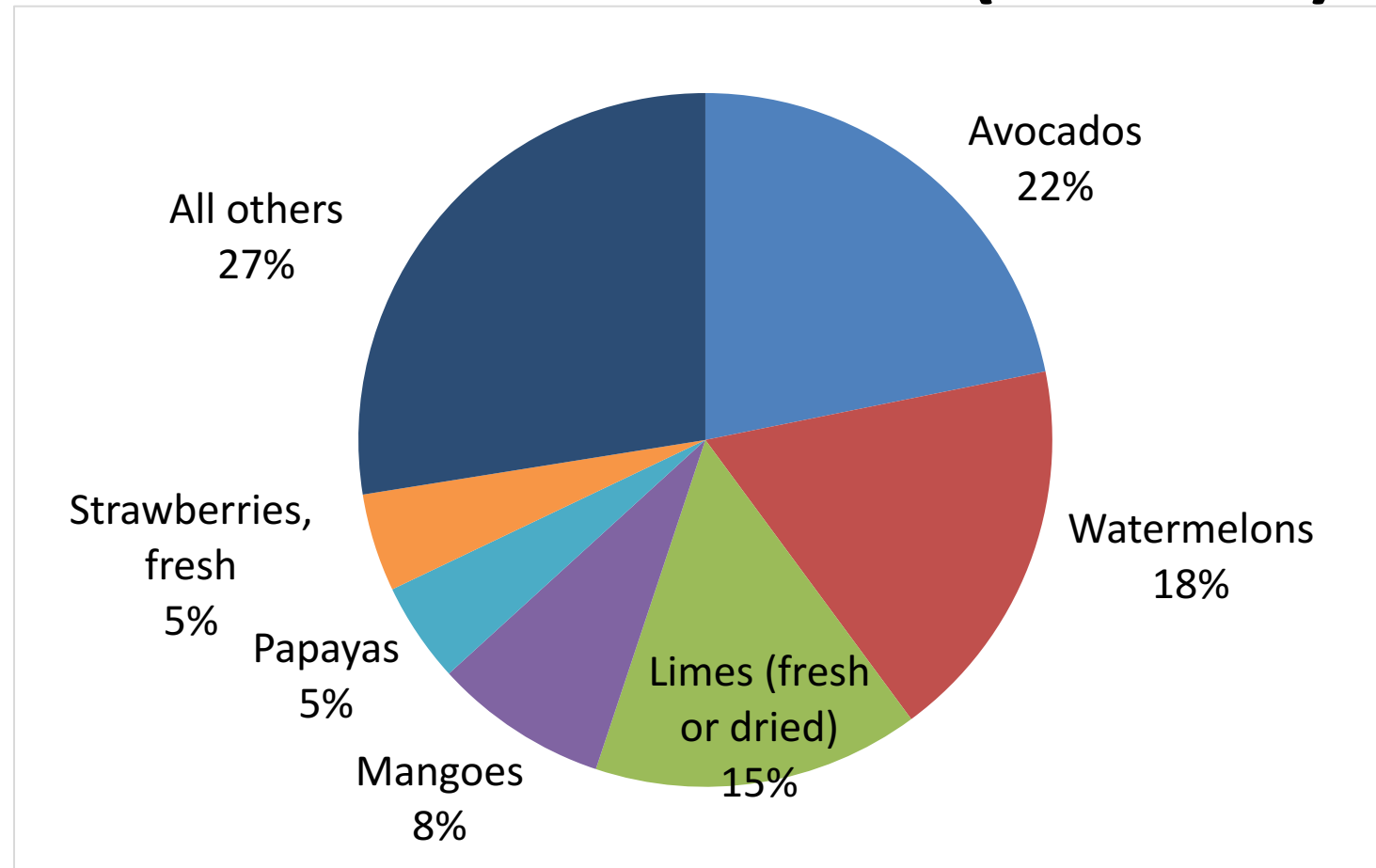


Source: Prepared by USDA, Economic Research Service, using data from U.S. Department of Commerce.

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# Avocados: The leading U.S. fruit import from Mexico in 2016 (volume)



Source: Prepared by USDA, Economic Research Service, using data from U.S. Department of Commerce.

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# Tomatoes

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# Protected culture technology has transformed Mexican shipments to the United States

- Protected culture (PC) is a broad term that covers high-tech greenhouses to low-tech shade houses.
- Began in the mid-1990s in Canada
- Applied commercially first in Canada, then in the United States, and finally in Mexico which is now the powerhouse in the industry
- Primary commodities are tomatoes, bell peppers, and cucumbers
- Canadian and U.S. greenhouses are very high-tech and expensive
- Mexican operations are a mix of high-tech greenhouses and lower-tech shade houses
- Analytical challenge: low-quality data on U.S. greenhouse production

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# U.S. tomato market: Import share has risen from 17 to 54 percent

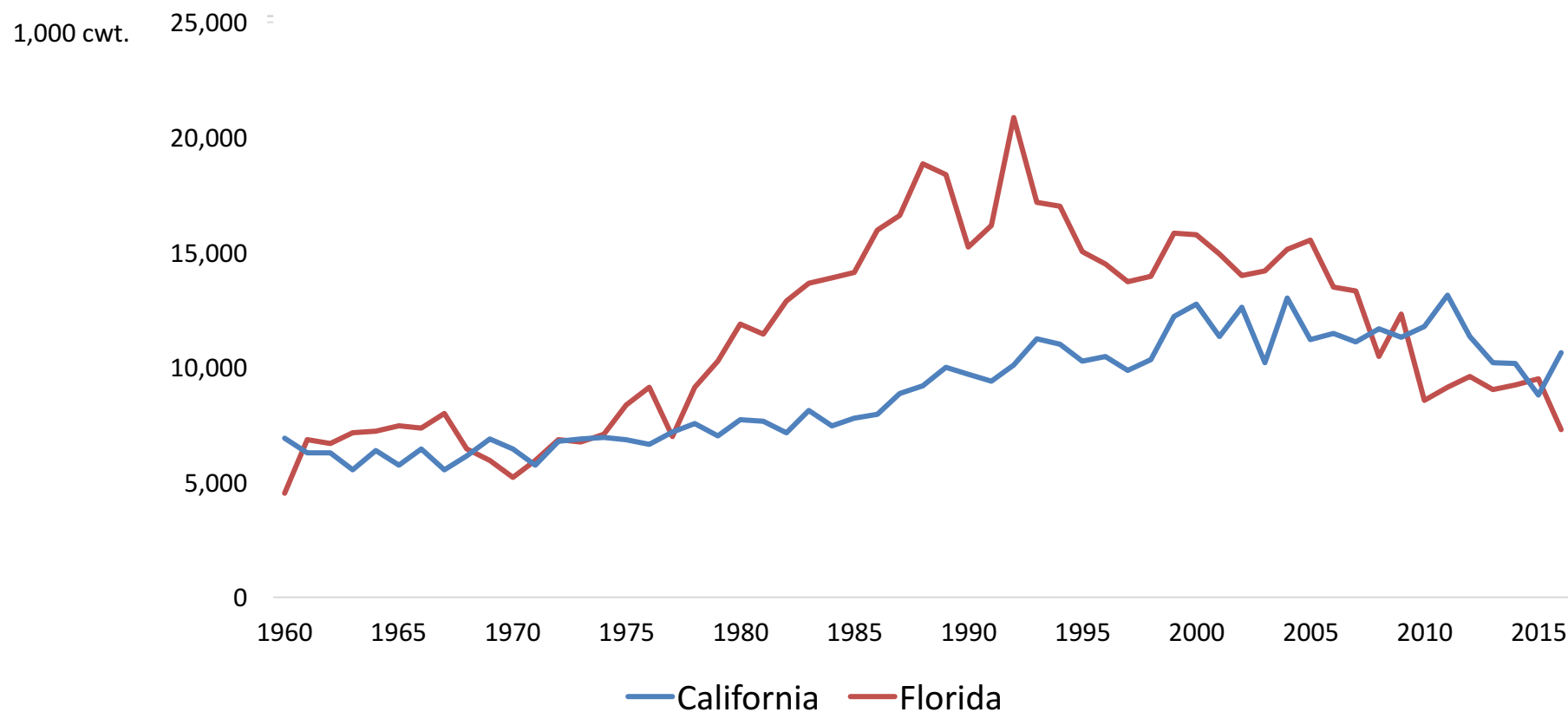
	<u>Field production</u>	<u>Imports (field and PC)</u>	<u>Exports (field and PC)</u>	<u>Per capita consumption</u>	<u>Import share of consumption</u>
	<u>Million lbs</u>			<u>Lbs.</u>	<u>Percent</u>
<u>1990-92</u>	<u>3,561</u>	<u>675</u>	<u>320</u>	<u>15</u>	<u>17</u>
<u>2014-16</u>	<u>3,286</u>	<u>3,605</u>	<u>217</u>	<u>21</u>	<u>54</u>
<u>Percent change</u>	<u>-8</u>	<u>434</u>	<u>-32</u>	<u>35</u>	<u>212</u>

Source: Prepared by USDA, Economic Research Service, using data from ERS and U.S. Department of Commerce.

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# California and Florida fresh-market tomato production: Florida's production has declined since the early 1990s

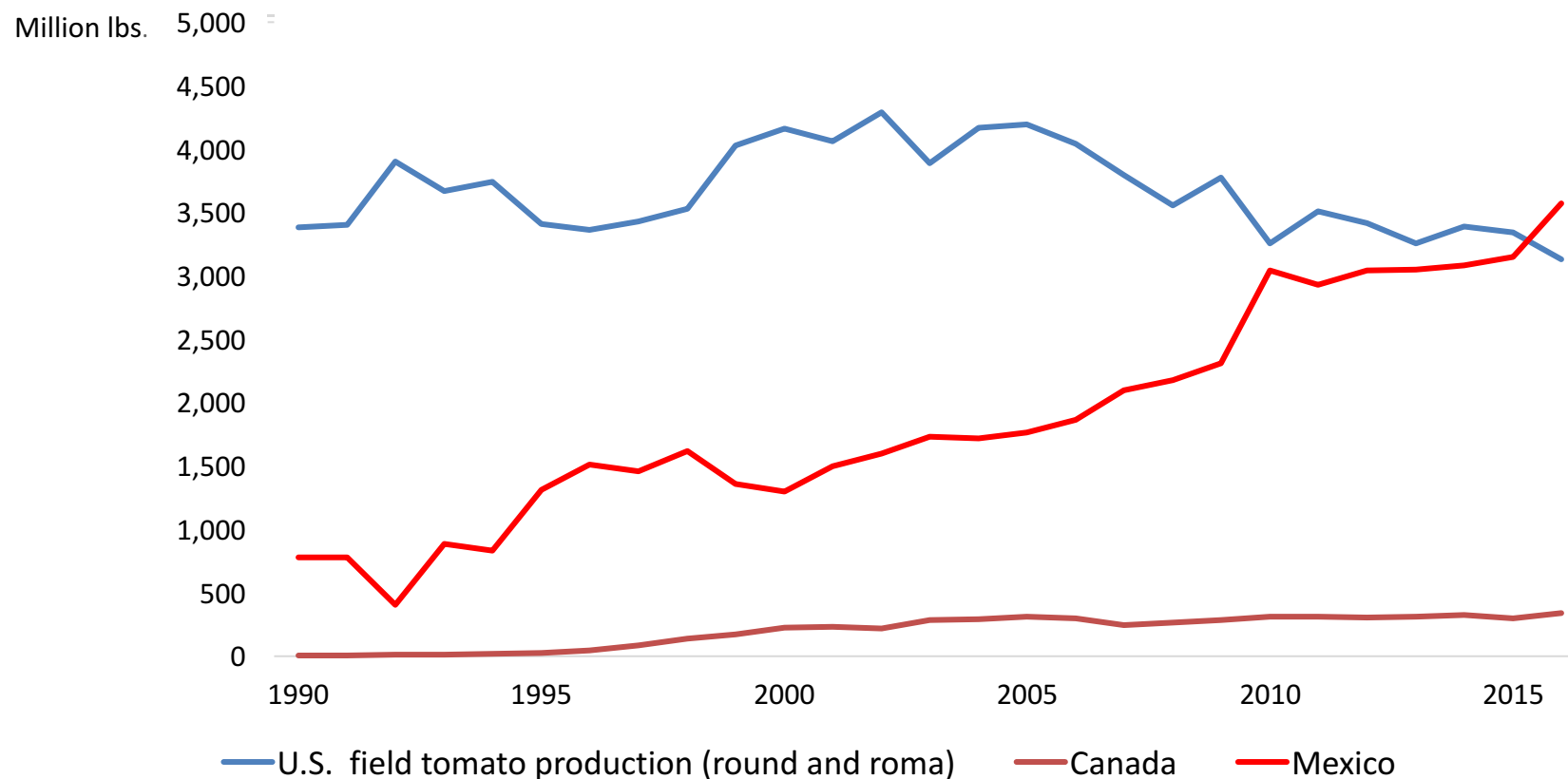


Source: Prepared by USDA, Economic Research Service, using data from ERS and USDA, NASS.

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## U.S. field tomato production (round and roma) and field and PC imports, 1990-2016: Imports from Mexico now exceed U.S. production

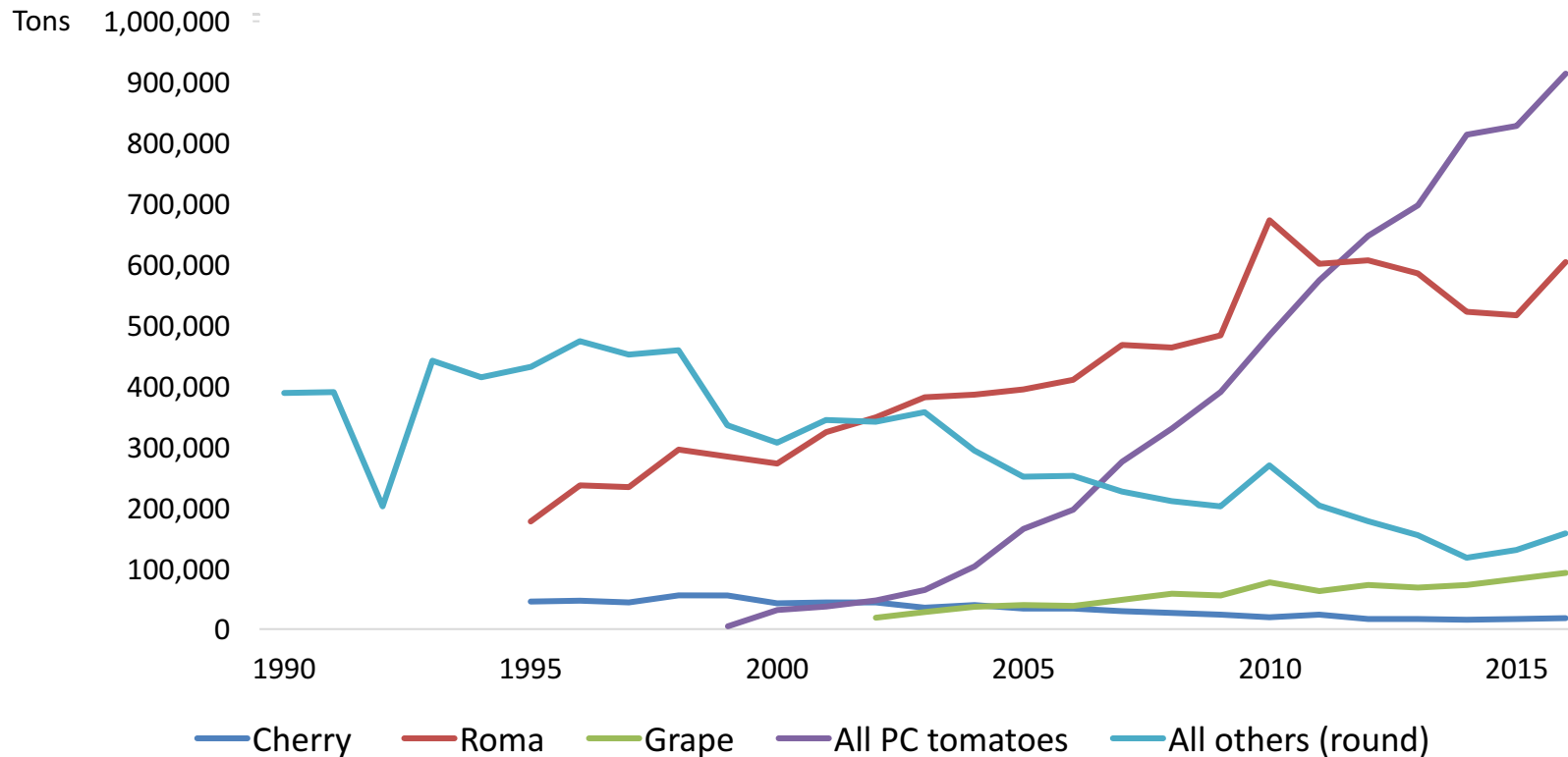


Source: Prepared by USDA, Economic Research Service, using data from ERS and USDA, NASS.

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# PC and field roma tomatoes now account for the majority of U.S. tomato imports from Mexico



Source: Prepared by USDA, Economic Research Service, using data from U.S. Department of Commerce.  
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# Cucumbers

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# U.S. cucumber production decreased by 22 percent since 1990-92

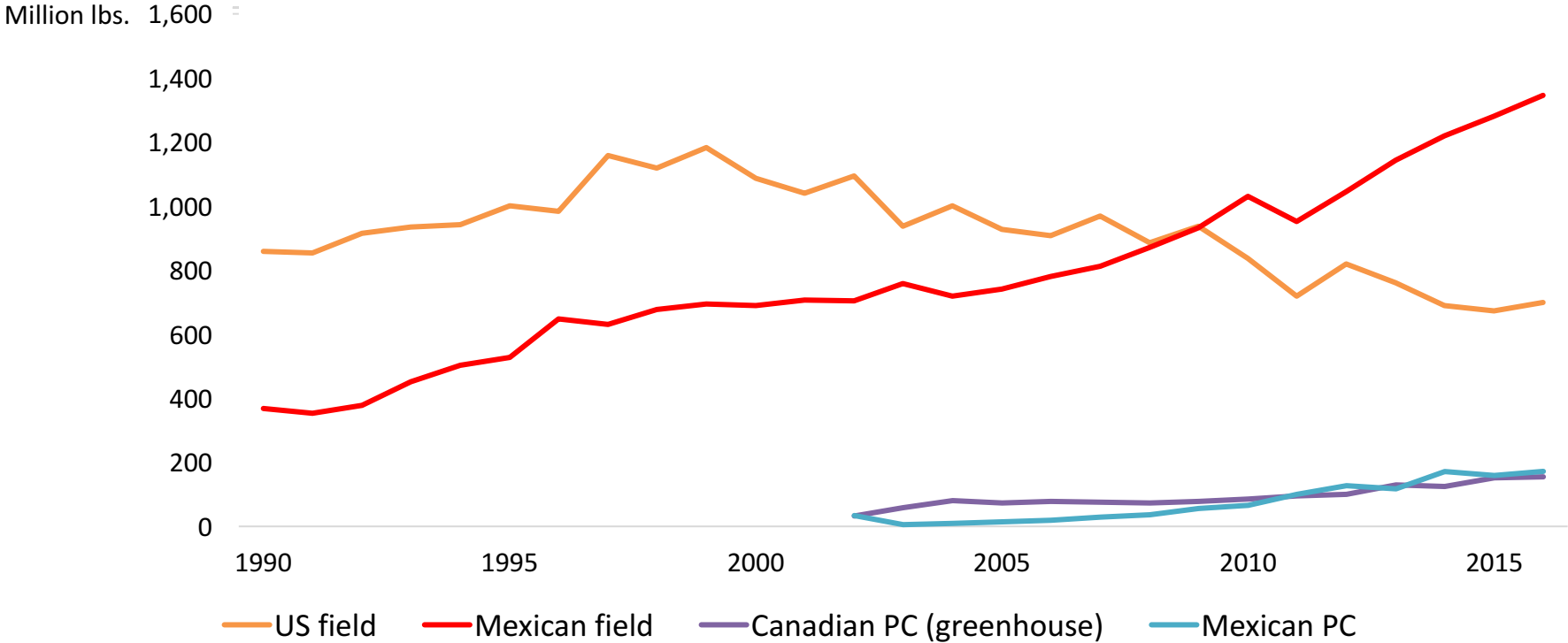
	Field production	Imports (field and PC)	Exports (field and PC)	Per capita consumption	Import share of consumption
	Million lbs.			Lbs.	Percent
1990-92 average	876	403	82	5	34
2014-16 average	687	1,801	31	8	73
Percent change	-22	347	-63	62	118

Source: Prepared by USDA, Economic Research Service, using data from ERS and U.S. Department of Commerce.

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# U.S. imports of field-produced cucumbers from Mexico exceed imports of PC-cucumbers



Source: Prepared by USDA, Economic Research Service, using data from ERS and U.S. Department of Commerce.



# Bell peppers

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# U.S. bell pepper market: Imports soar 514 percent

	Field production	Imports (field and PC)	Exports (field and PC)	Per capita consumption	Import share of consumption
	Million lbs			Lbs	Percent
1990-92 average 1/	630	211	169	2.8	26
2014-16 average	865	1,294	109	7.2	64
Percent change	37	514	-36	161	146

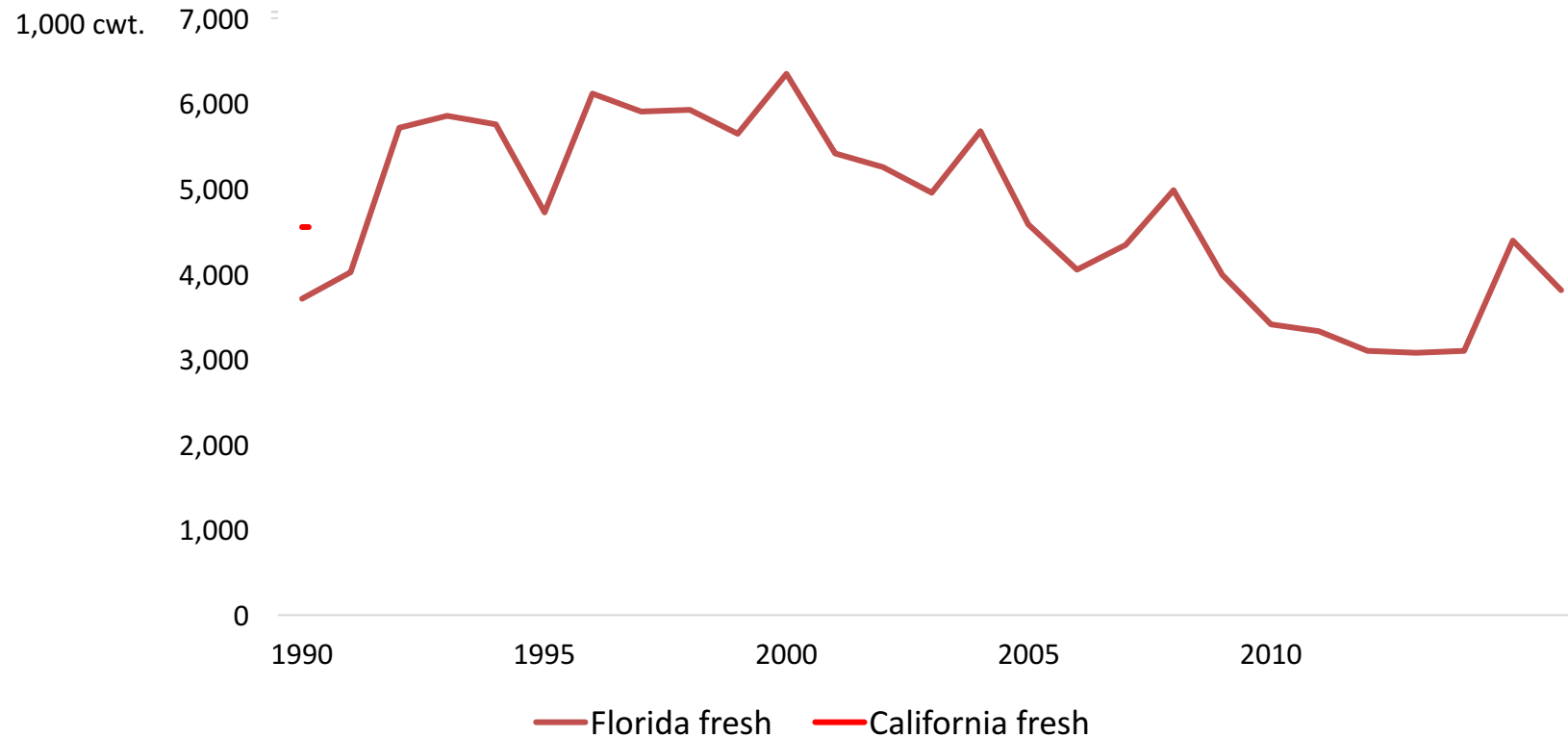
1/ Fresh production, per capita consumption, and import share of consumption based on 1990-91 average.

Source: Prepared by USDA, Economic Research Service, using data from ERS, USDA AMS, and USDA, NASS.

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# U.S. bell pepper field production: After initial increases, Florida and California's fresh-market production has declined 1/



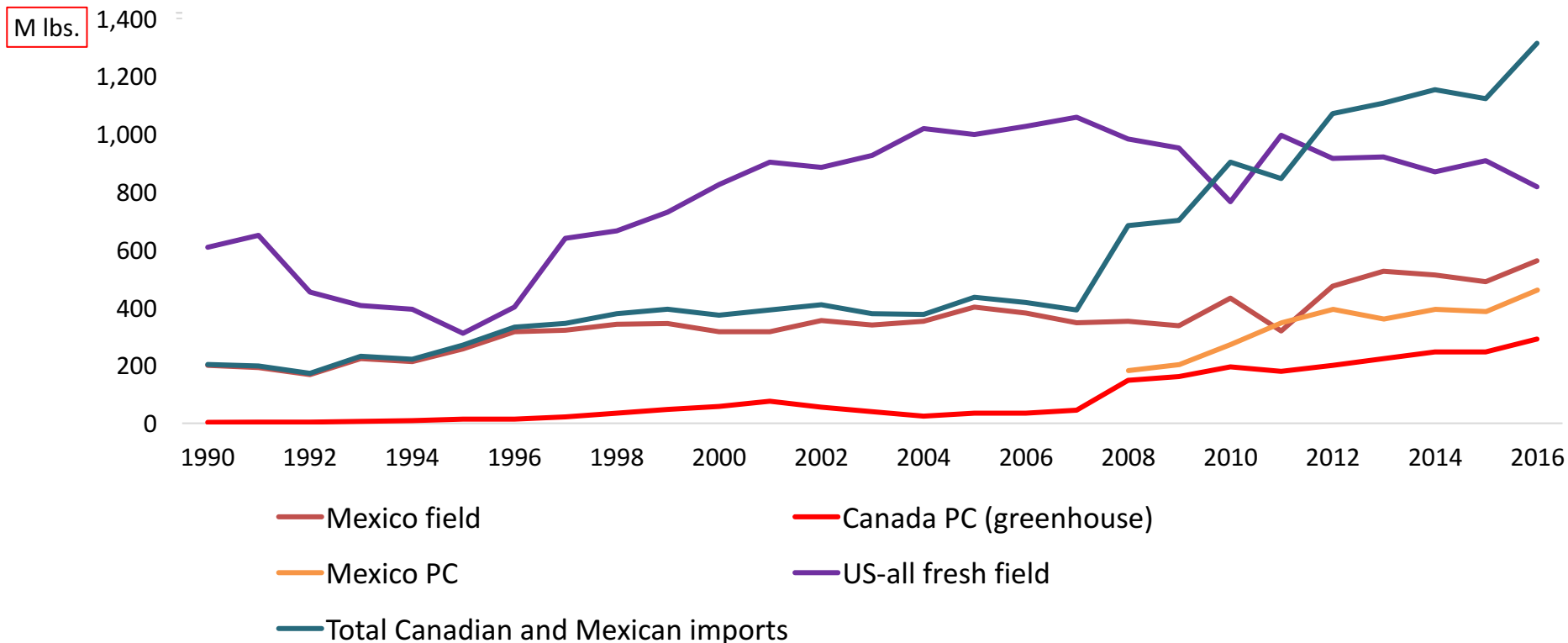
1/ There are data problems for California bell peppers in the mid 1990s and those numbers are not shown.

Source: Prepared by USDA, Economic Research Service, using data from ERS, USDA/AMS, and USDA/NASS.

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# U.S. bell pepper imports from Mexico: About evenly balanced between field and PC product



Source: Prepared by USDA, Economic Research Service, using data from ERS, USDA/AMS, and U.S. Department of Commerce.

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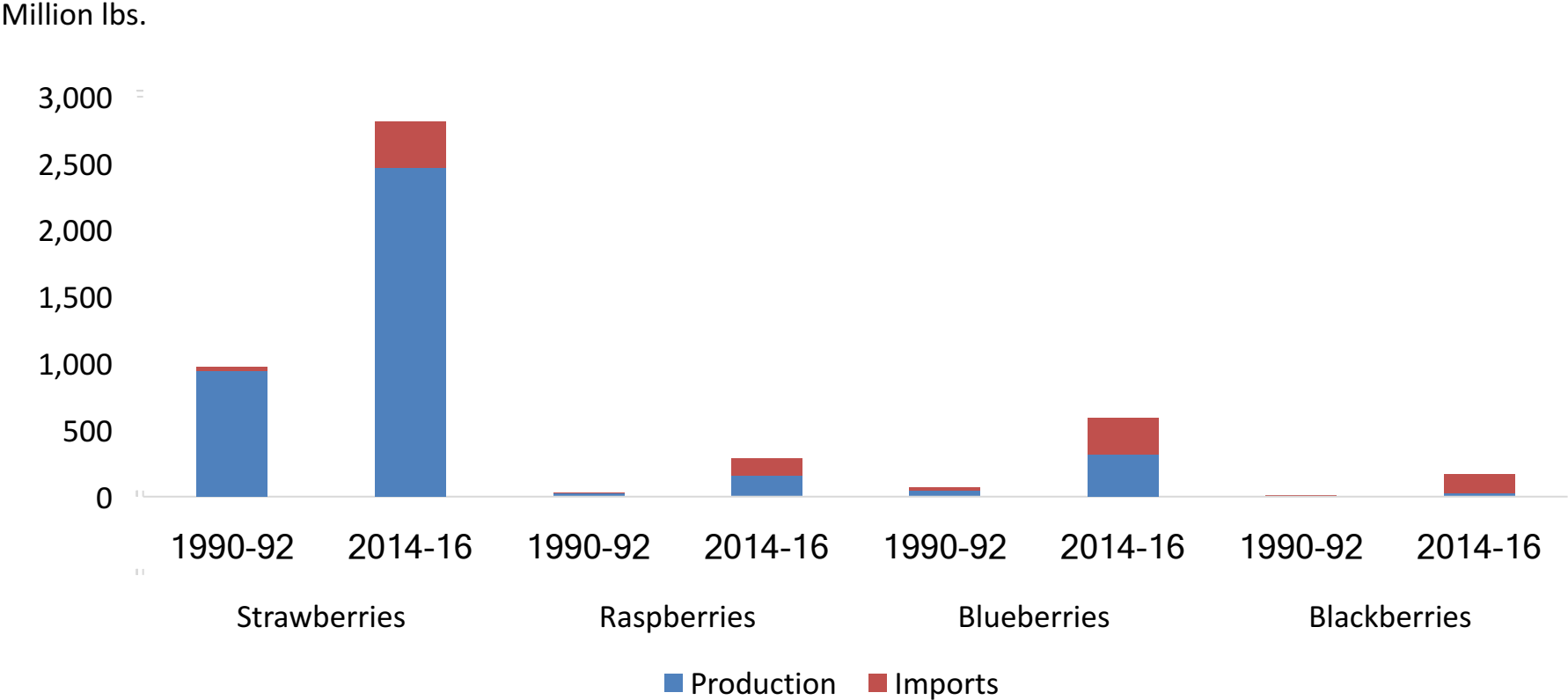


# Berries

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# U.S. berry supply: Strawberries still the leading berry consumed in the United States



Source: Prepared by USDA, Economic Research Service, using data from ERS and U.S. Department of Commerce.

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# U.S. berry market overview: Mexico supplies almost all imports, except blueberries

	StrawB	RaspB	BlueB	BlackB 1/
	Percent change (1990-92 to 2014-16)			
U.S. production	161	516	544	74
Per-capita consumption	128	1,164	931	NA
Imports	1,084	4,792	1,334	2,687
	Percent (2014-16)			
Import share of consumption	14	55	53	NA
MX share of imports	100	98	9	95

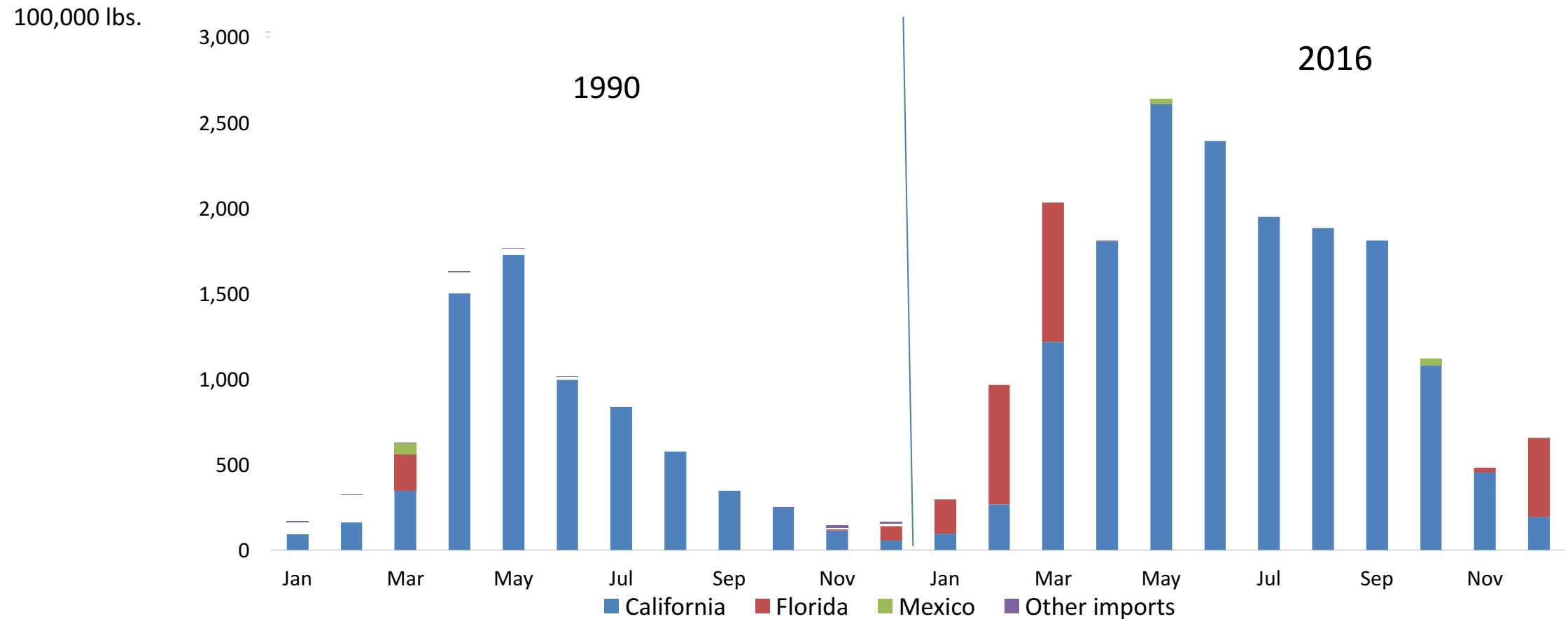
1/ Growth in blackberry production is based on data from 2008 and 2016 only.

Source: Prepared by USDA, Economic Research Service, using data from ERS, USDA/AMS, and U.S. Department of Commerce.

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# U.S. strawberry shipments: Imports of Mexican strawberries for the winter season increased between 1990 and 2016

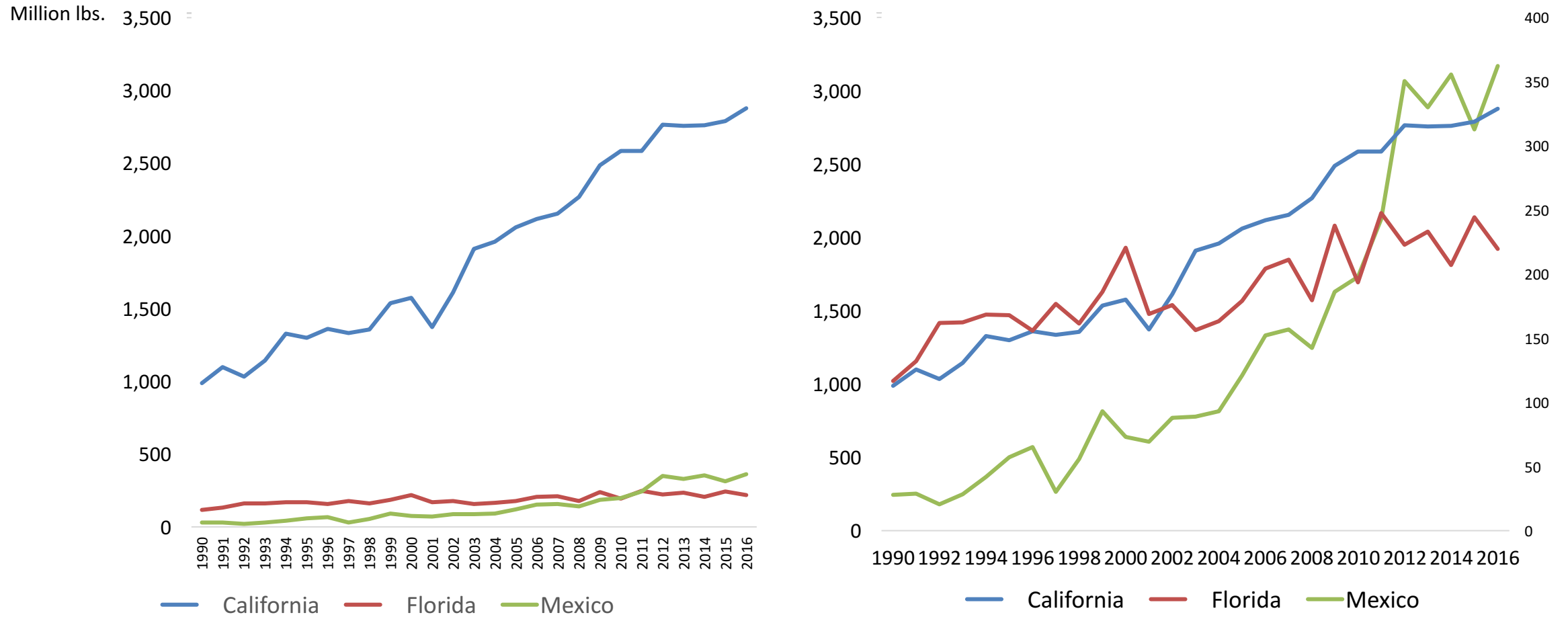


Source: Prepared by USDA, Economic Research Service, using data from USDA/AMS.

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# Growth in U.S. strawberry supplies: Florida production is leveling off



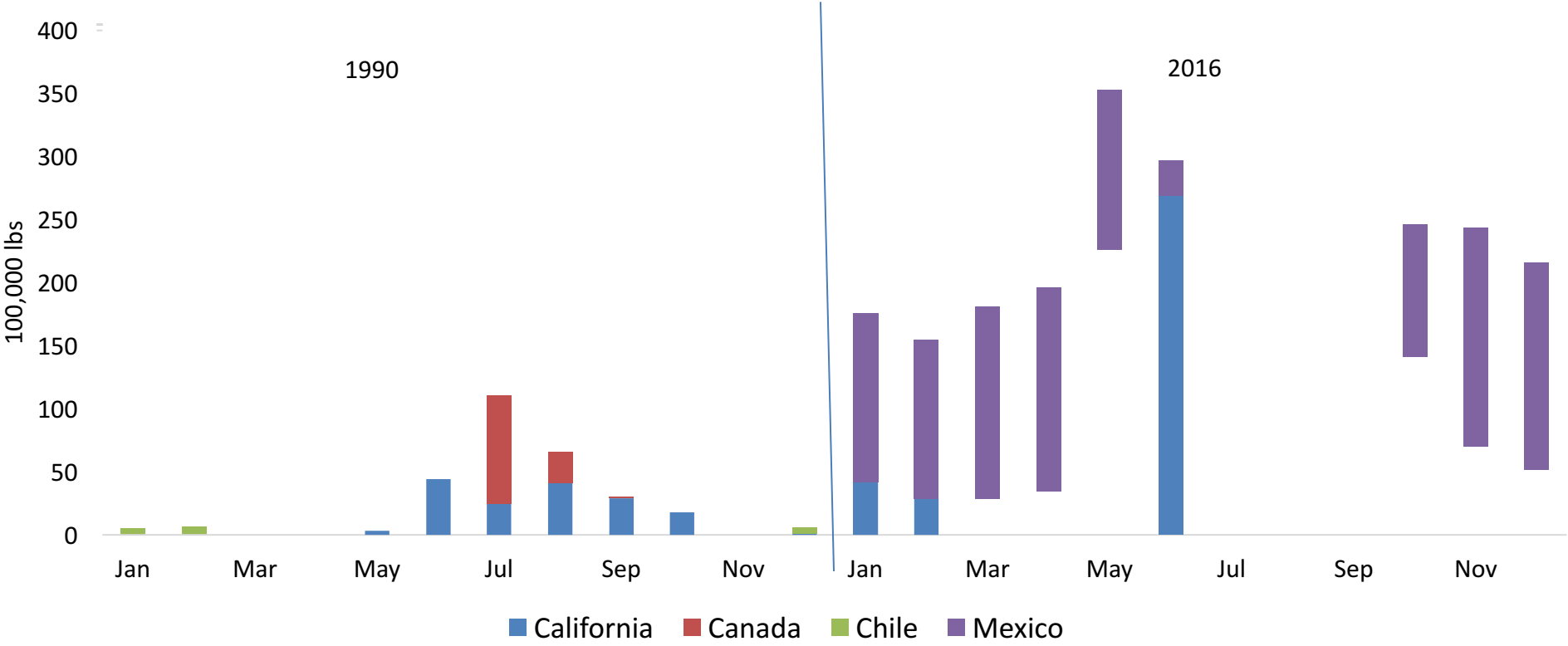
Source: Prepared by USDA, Economic Research Service, using data from USDA/AMS.

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# Mexican raspberries expand the U.S. consumption calendar

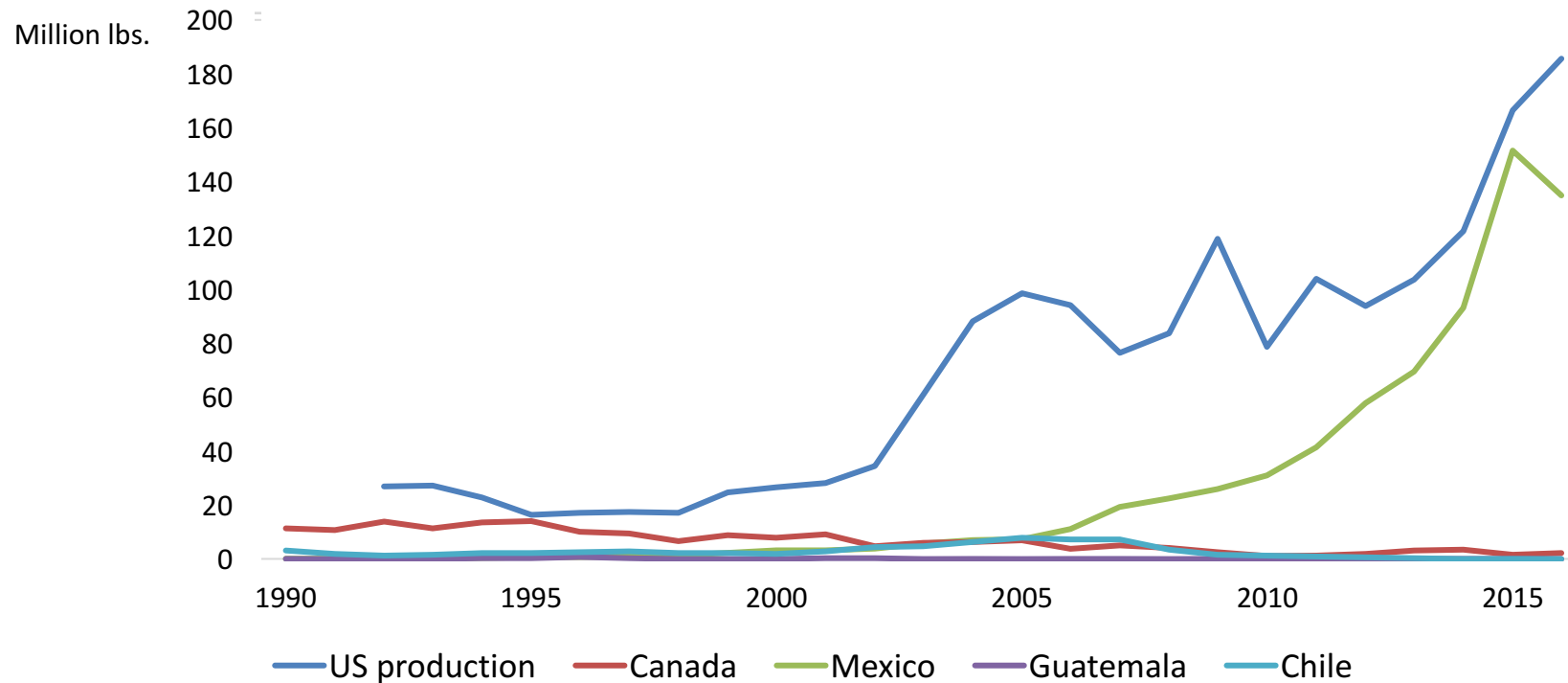


Source: Prepared by USDA, Economic Research Service, using data from USDA/AMS.

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# Raspberry imports from Mexico approach U.S. production level

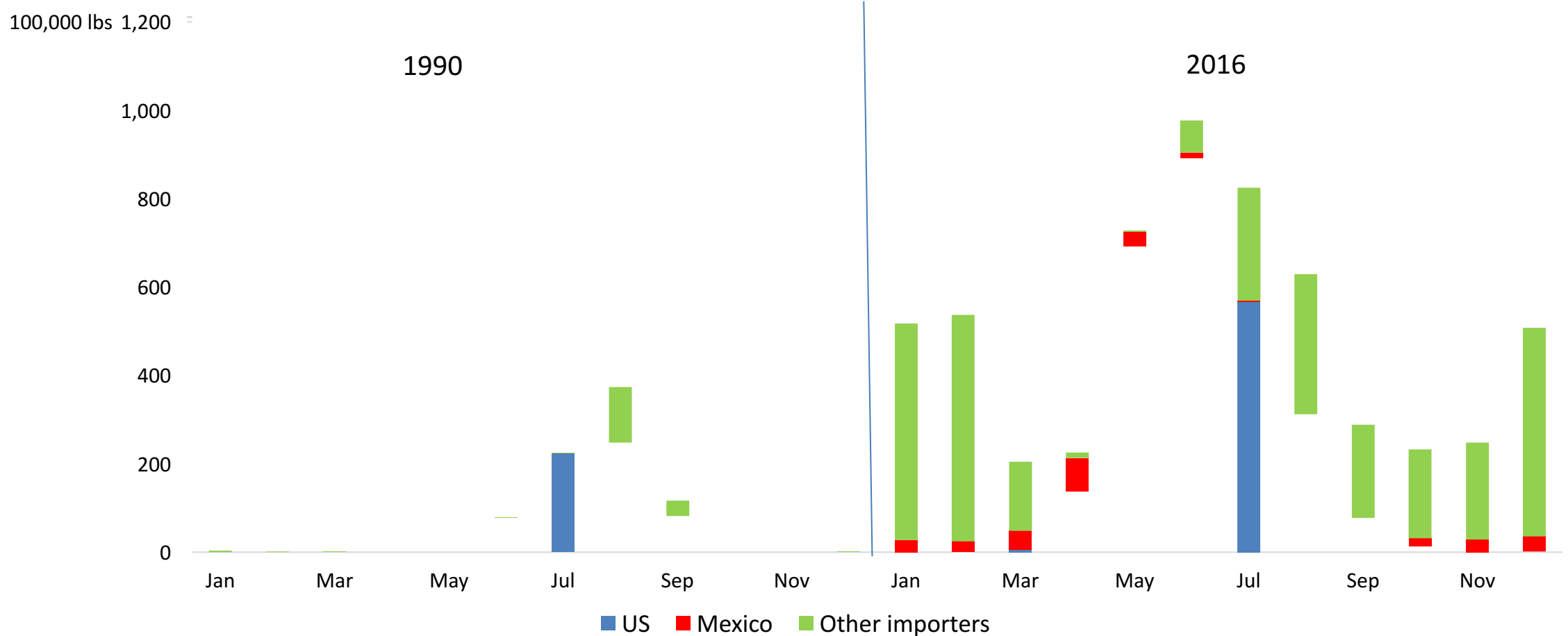


Source: Prepared by USDA, Economic Research Service, using data from ERS and U.S. Department of Commerce.

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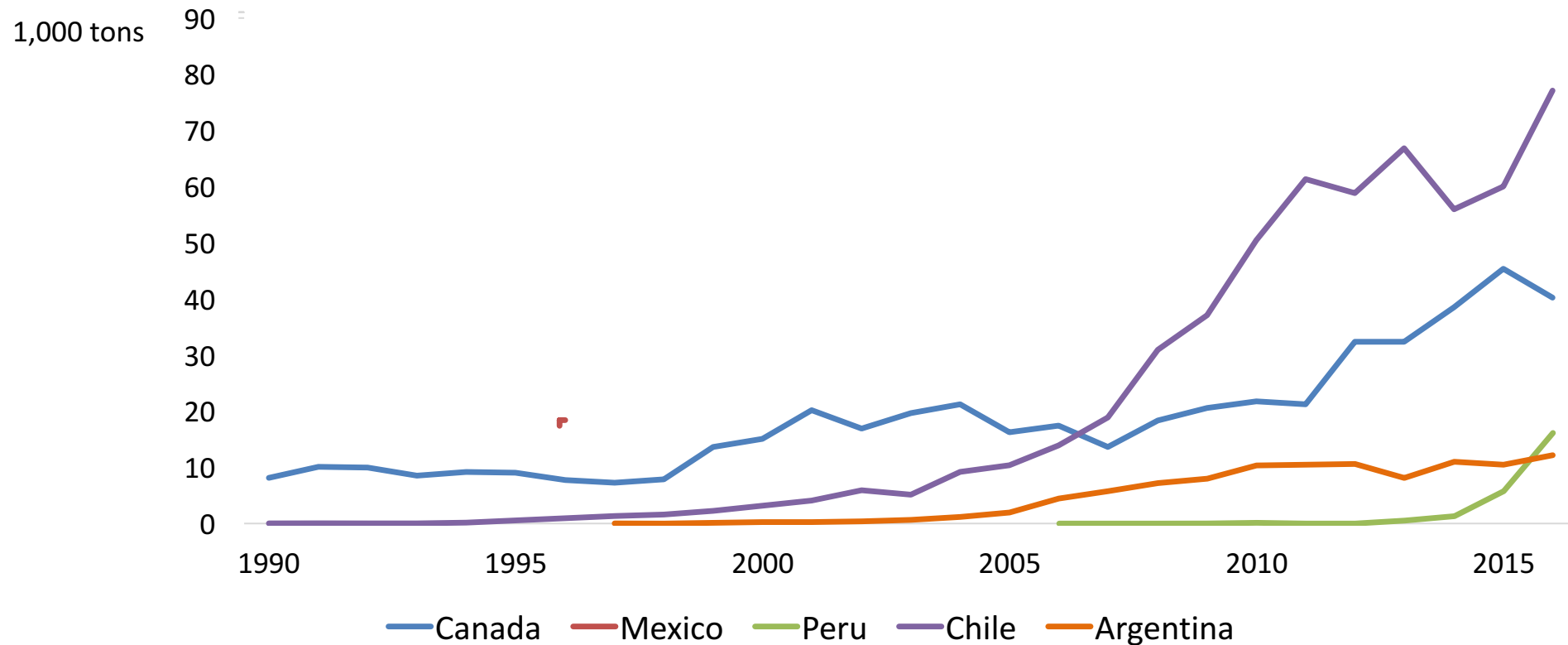
# U.S. per capita blueberry consumption increased 931 percent between 1990-92 and 2014-16



Source: Prepared by USDA, Economic Research Service, using data from USDA/AMS.  
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# Mexico's share of U.S. blueberry imports increased to 9 percent

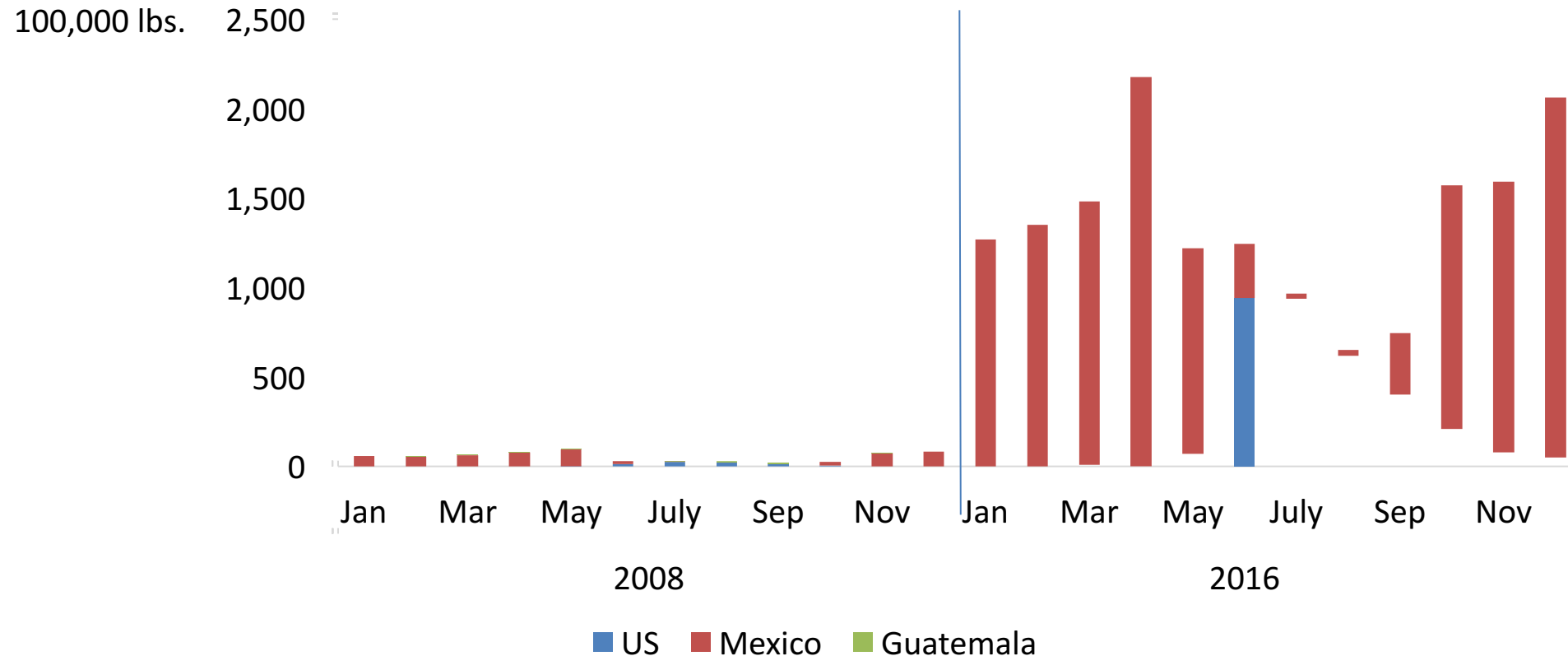


Source: Prepared by USDA, Economic Research Service, using data from U.S. Department of Commerce.

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# Mexico is the leading source—foreign or domestic—of blackberries in the United States



Source: Prepared by USDA, Economic Research Service, using data from USDA/AMS.

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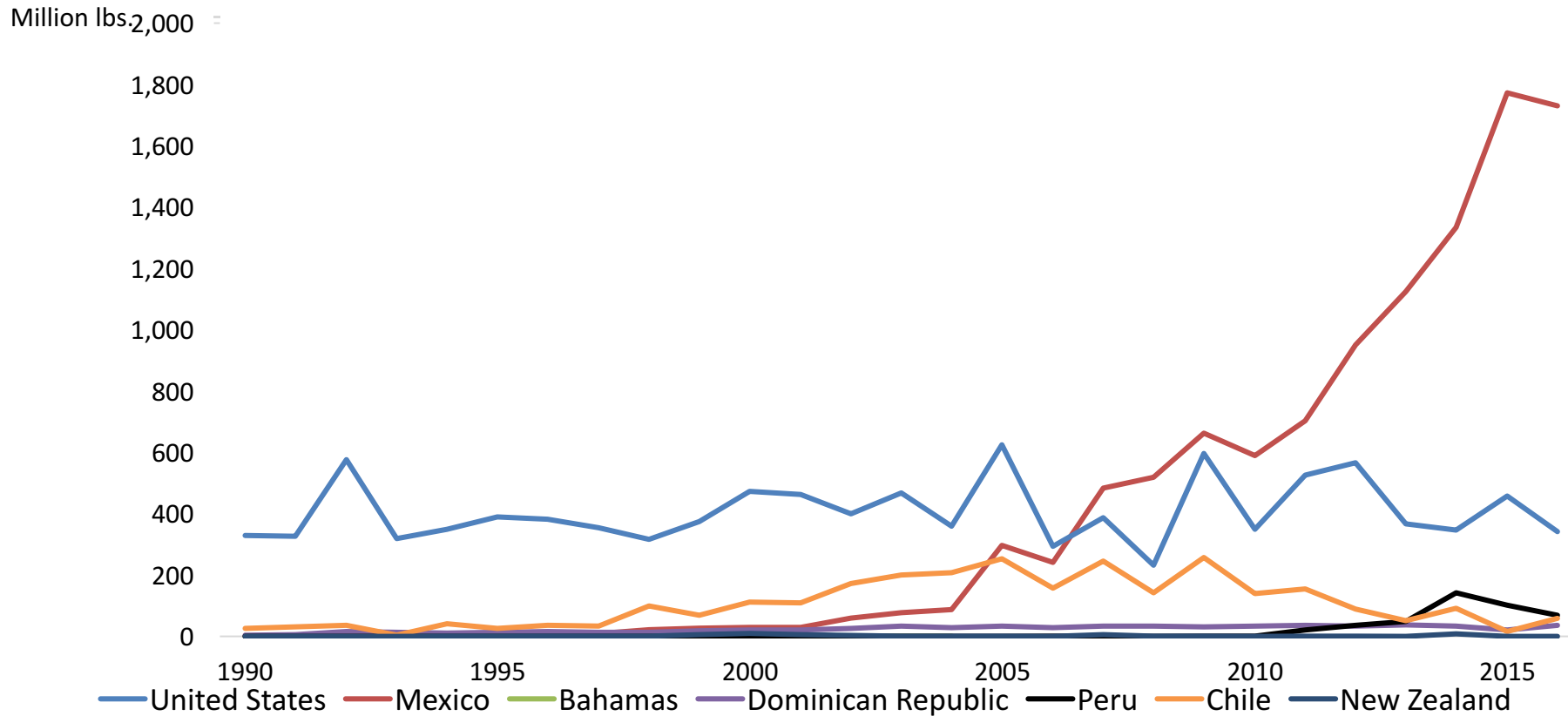


# Avocados

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# Avocados: Mexican production supplied 91 percent of U.S. consumption in 2016

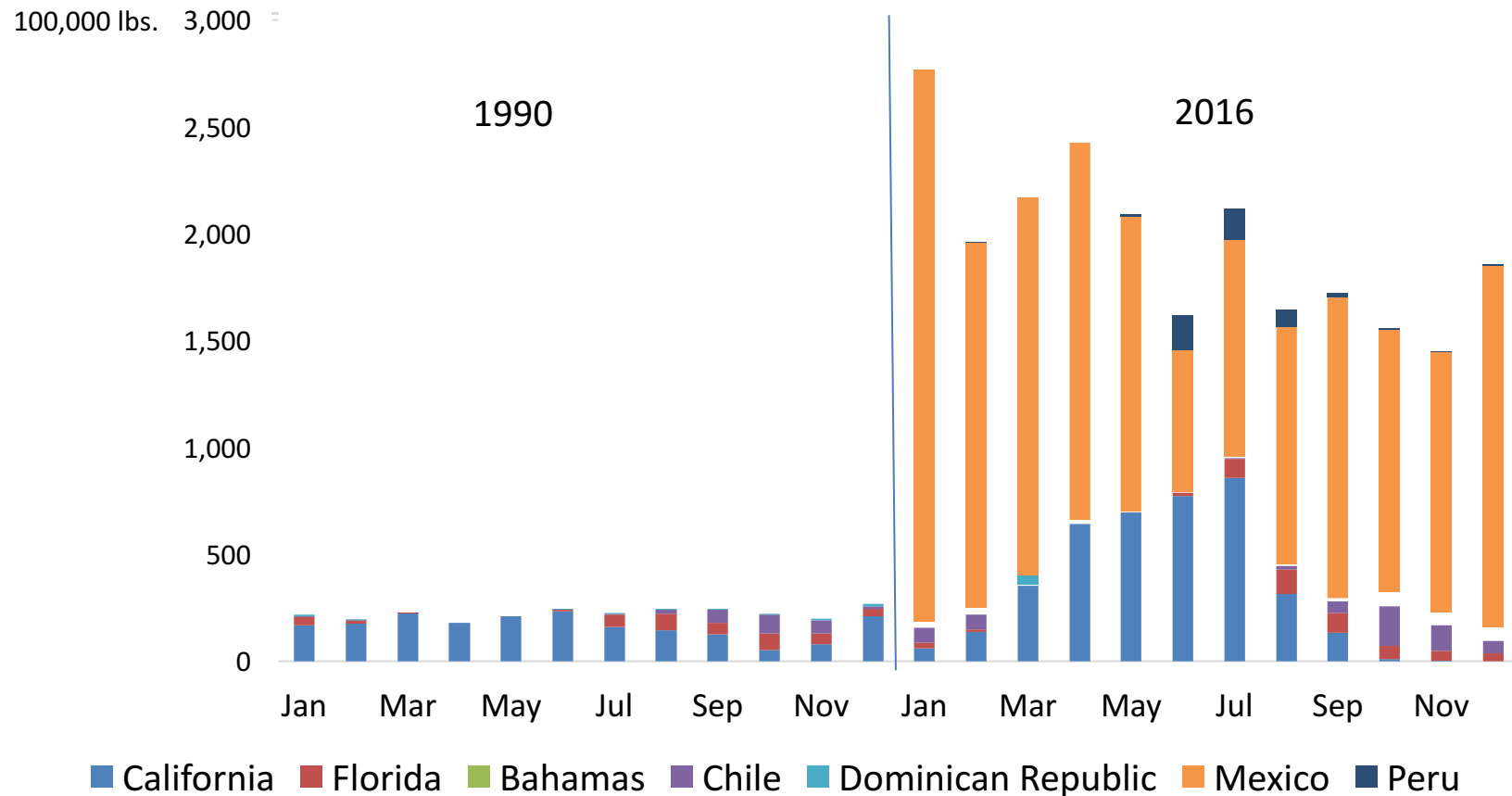


Source: Prepared by USDA, Economic Research Service, using data from ERS and U.S. Department of Commerce.

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# U.S. avocado production is higher during the summer, when imports from Mexico are lower



Source: Prepared by USDA, Economic Research Service, using data from USDA/AMS.

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# Questions and discussion

Thank you!

Linda Calvin, [lcalvin@ers.usda.gov](mailto:lcalvin@ers.usda.gov)

Steven Zahniser, [zahniser@ers.usda.gov](mailto:zahniser@ers.usda.gov)

ERS website: [www.ers.usda.gov](http://www.ers.usda.gov)

