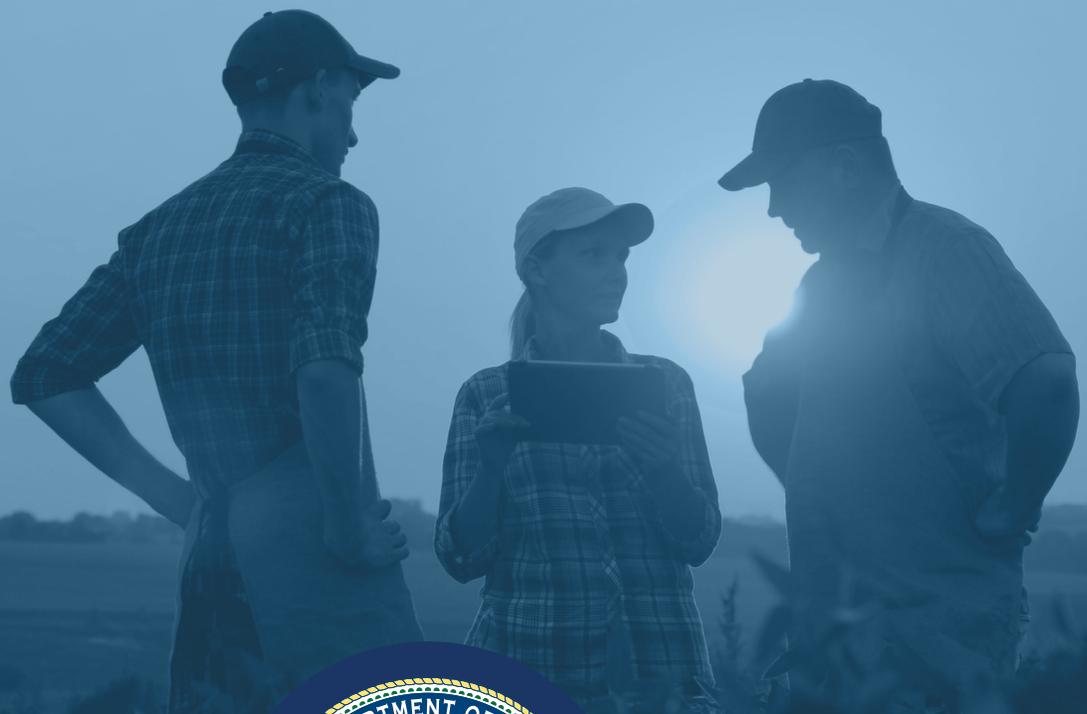


Impact of Mexico's Ag-Exports On Florida Agriculture

October 2025



**Florida Department of Agriculture
and Consumer Services**

Commissioner Wilton Simpson

FDACS.gov

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Directive and Guidelines (National Trade Policy Agenda Objectives Highlights)

“Examine the historical changes of Florida agricultural production that may have been adversely impacted by Mexican fresh ag-exports from 2001-2023. Determine if any acts, policies, or practices have burdened and/or restricted Florida commerce. Determine if there are signs of any reduced, stunted, or negatively impaired Florida sales, pricing, distorted pricing positions, hampered growth, profitability, and/or market share losses since the North American Free Trade Agreement (NAFTA) was implemented. Establish baseline data positions as the United States-Mexico-Canada Free Trade Agreement (USMCA) is implemented for future analysis.

With an emphasis on 2001-2023, focus on findings, trends, and/or practices that distort markets and undermine U.S. (Florida) competitiveness; identify these instances and negative market conditions impacts, with a special emphasis on the last 3-5 years, that appear pertinent. Furthermore, where possible, isolate and estimate any negative impacts, unreasonable acts, policies, and/or factors associated with Mexican agricultural exports to the United States (Florida) that appear particularly injurious and/or harmful to Florida Agriculture’s specialty product sector.”

Wilton Simpson
Commissioner of Agriculture

Florida and Mexico produce a wide array of similar agricultural products during much of the year when most domestic U.S. producers are dormant. This report demonstrates that Florida producers continue to suffer a disproportionate economic injury. Florida values of production for 2023-2024 are included where available at the time of this writing.

Data Sources include:

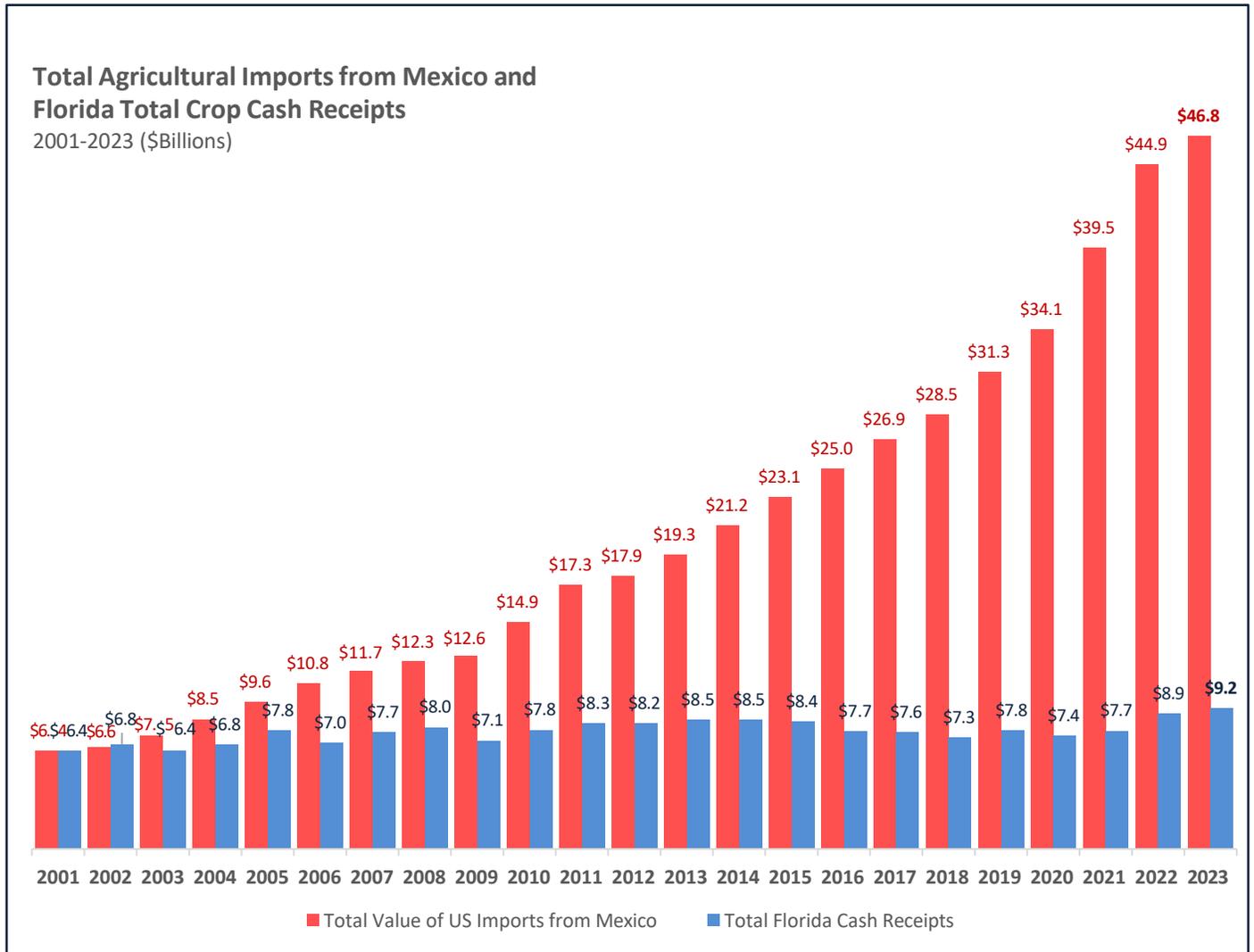
- USDA AMS Market News; Movement and Shipping Point Data sets
- FDACS DIVISION OF MARKETING ANALYTICS
- FDACS HISTORICAL RESEARCH AND SUPPLEMENTALS
- USMCA
- U.S. Census Bureau; USATRADE database
- USDA NASS/FASS
- USDA ERS
- GOOGLE MAP
- 2019 Economic Ag Contributions Report - Food and Resource Economics Department - University of Florida, Institute of Food and Agricultural Sciences - UF/IFAS

EXECUTIVE SUMMARY

Florida and Mexico produce a wide array of similar agricultural products during much of the year when most domestic U.S. producers are dormant. This report demonstrates that Florida producers continue to suffer a disproportionate economic injury. Florida values of production for 2023-2024 are included where available at the time of this writing.

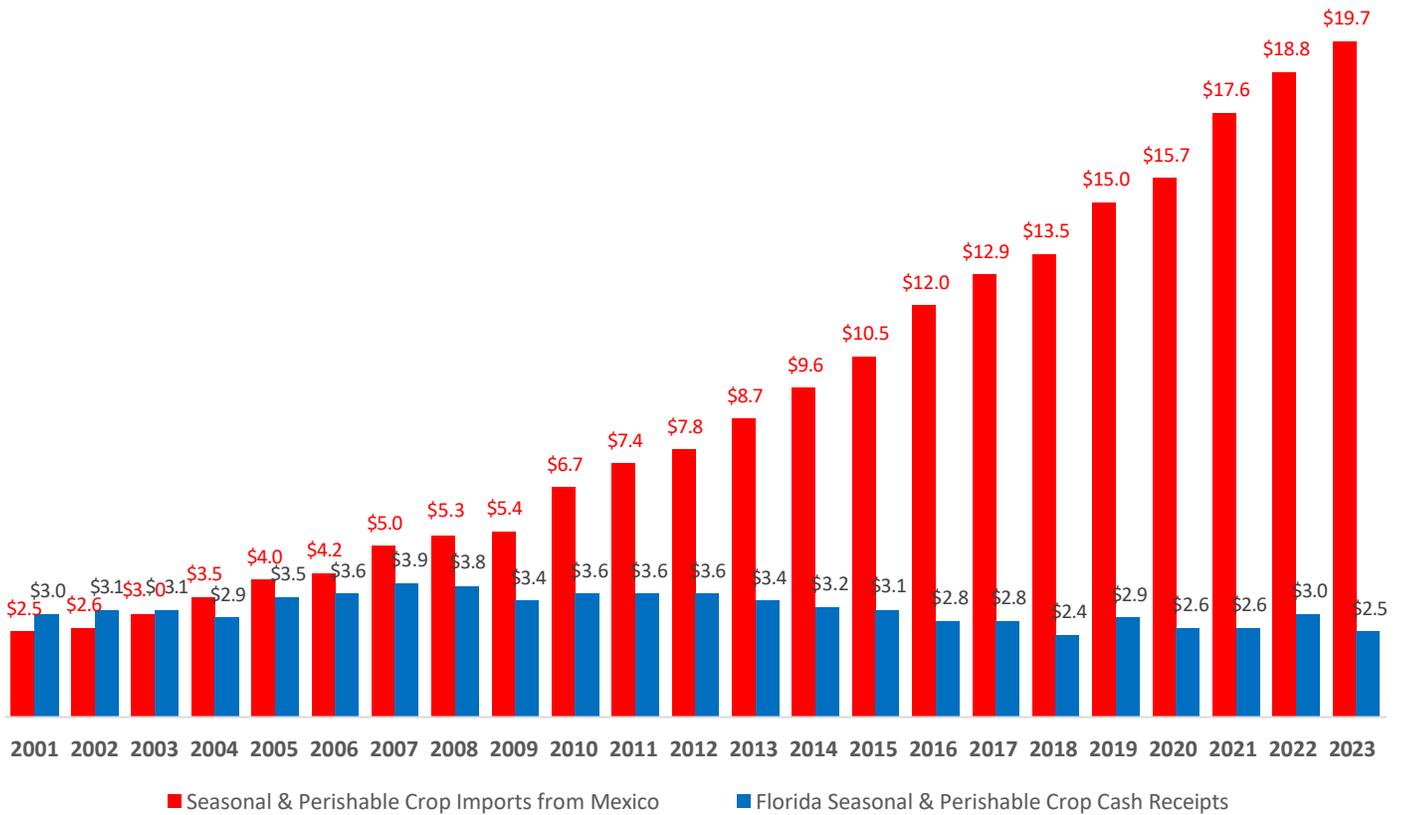
- Annually, Florida agricultural producers lost sales estimated at **10-20%** or **\$570 million - \$1.14 billion** in total economic losses due to Mexico's ag-export expansion.
- **7,072 – 14,144 Florida jobs lost** based on \$570 million - \$1.14 billion in total economic losses annually for Florida's economy.
- **\$21.0 - \$42.1 million in lost indirect tax revenues for Florida** based on \$570 million - \$1.14 billion in total economic losses annually for Florida's economy.
- **\$866 million - \$1.73 billion in annual total economic effects injury to Florida's economy** based upon direct, indirect, and induced impacts from the loss of \$570 million - \$1.14 billion in annual unrealized agricultural sales.
- Between 2003 and 2023, there was a **557%** increase in the value of specialty crop imports from Mexico.
- A **\$37.6 billion** gap currently exists between Mexican ag-exports and Florida's total ag value (2023).
- Over the last five years, the value of all commodities imported from Mexico grew by **49.5%** between 2019-2023 (**\$31.3 - \$46.8 Bn**). For specialty crops, the value of imports from Mexico grew **31.3%** in the last five years (**\$15.0 - \$19.7 Bn**).
- Florida's farmers have **44.5 – 85.4% domestic market share** for many specialty crop commodities during the **November to April growing season**. Any unfair competitive disadvantages during this period disproportionately affect Florida.
- Florida's market share (volume) declined in five of the six primary commodities examined between 2004 - 2024:
 - **Bell Peppers** - Florida lost **73.4%** Market Share between 2004 and 2024. Mexico gained a **110.4%** Market Share during that same time. The change in total U.S. supply between 2004 and 2024 is **580** million pounds, an expansion of **52.0%**.
 - **Tomatoes, Rounds** - Florida lost **54.4%** Market Share between 2004 and 2024. Mexico gained a **74.7%** Market Share during that same time. The change in total U.S. supply between 2004 and 2024 is **800** million pounds, a decline of **30.9%**.
 - **Strawberries** - Florida gained **29.0%** Market Share between 2004 and 2024. Mexico gained a **169.1%** Market Share during that same time. The change in total U.S. supply between 2004 and 2024 is **698** million pounds, an expansion of **132.3%**.
 - **Blueberries** - Florida lost **52.0%** of its Market Share between 2014 and 2024. Mexico gained a **361.8%** Market Share between 2014 and 2024 during that same time. The change in total U.S. supply between 2014 and 2024 is **137** million pounds, an expansion of **120.6%**.
 - **Cucumbers** - Florida lost **74.3%** Market Share between 2004 and 2024. Mexico gained a **28.5%** Market Share during that same time. The change in total U.S. supply between 2004 and 2024 is **1.18** billion pounds, an expansion of **111.0%**.
 - **Squash** - Florida lost **26.3%** Market Share between 2004 and 2024. Mexico gained a **3.6%** Market Share during that same time. The change in total U.S. supply between 2004 and 2024 is **25.8** million pounds, an expansion of **5.1%**.
- Florida and Mexico's approximate U.S. domestic share of the market comparing **2004 to 2024**:
 - **-47.97%** Florida
 - **+201.2%** Mexico

Mexico's Agricultural Export Expansion to the U.S.



- 2001 Seven years after the signing of NAFTA, Florida's cash receipts for the selected commodities were 0.19% less than the market value imported from Mexico.
- 2005 Four years later, the market value from Mexico was 24.3% higher than Florida cash receipts for the selected commodities.
- 2012 The market value of imports from Mexico was more than double Florida cash receipts for the selected commodities in 2012.
- 2003-2023 **527.8% increase** in the value of imports from Mexico for all agricultural commodities (**\$7.47 - \$46.81 Bn**).
- \$37.6 billion** Gap between value of all agricultural commodities imported from Mexico and Florida value of production for the same commodities in 2023.

Seasonal & Perishable Crop Imports from Mexico and Florida Seasonal & Perishable Crop Cash Receipts 2001-2023 (\$Billions)



2001

Seven years after the signing of NAFTA, Florida’s specialty crop cash receipts were 20.0% higher than the market value of specialty crop imports from Mexico.

2005

Four years later, the market value of imported specialty crops from Mexico was 14.3% higher than cash receipts for Florida specialty crops.

2015

A decade later, the market value of specialty crop imports from Mexico was 238.7% higher than the cash receipts for Florida specialty crops.

2003-2023

556.7% increase in the value of Mexican ag imports from 2003-2023 (**\$3.0 - \$19.7 Bn**).

\$17.2 billion

Gap between the value of imported specialty crops from Mexico and Florida specialty crop value of production in 2023.

Mexico's Production Areas



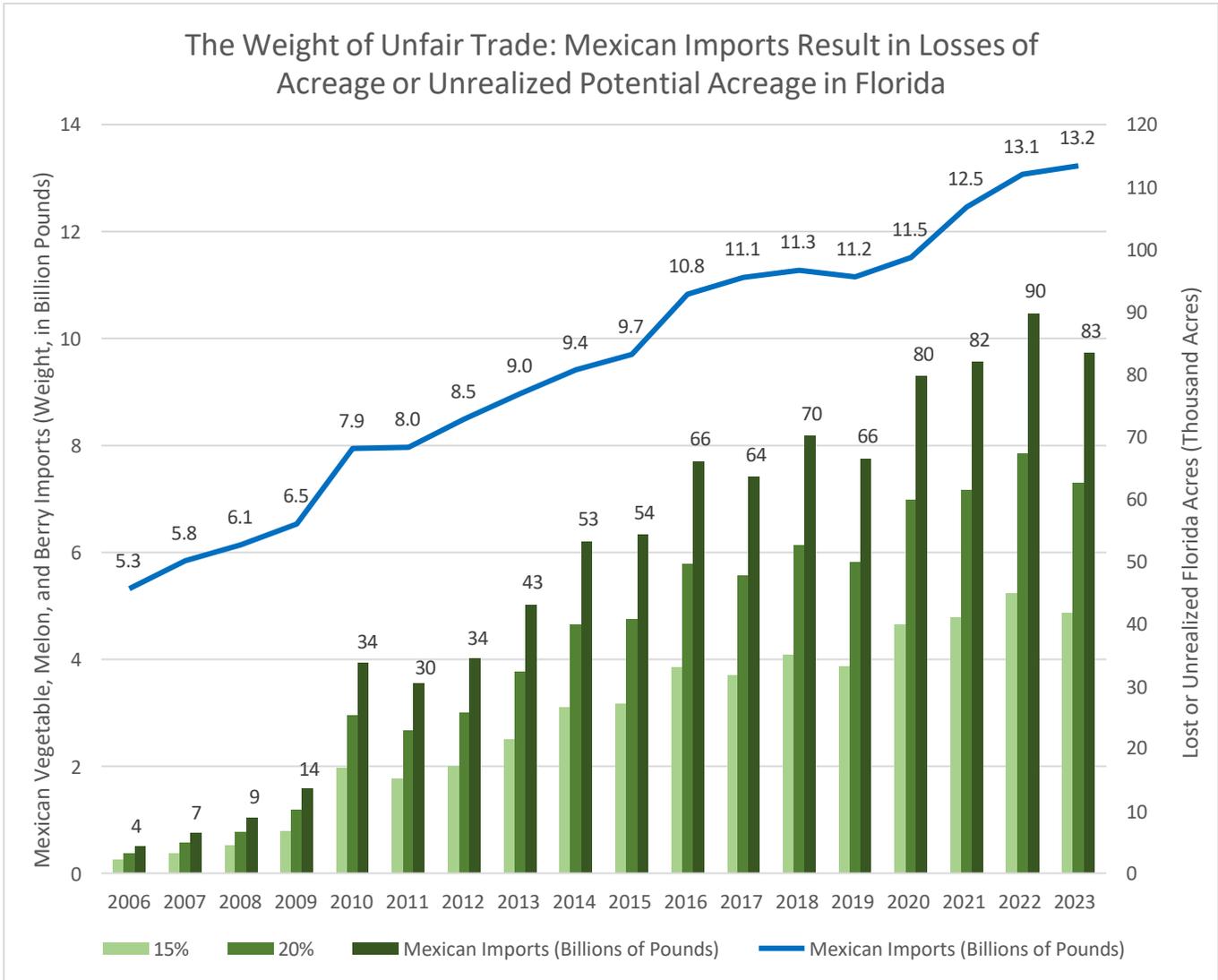
1: Map of specialty crop production areas in Mexico based on research done by University of California, Davis (<https://migration.ucdavis.edu/farm-labor/blog/2018/05/03/mexican-fruit-vegetable-exports-farm-labor/>)

Mexico's major agricultural production areas:

- Sonora: Bell peppers, cucumbers, tomatoes, squash, green beans, grapefruit, eggplant, asparagus.
- Sinaloa: Bell peppers, cucumbers, squash, tomatoes, eggplant.
- Baja California: Cucumbers, tomatoes, strawberries, squash, asparagus, snow peas.
- Baja California Sur: Bell peppers, cucumbers, green beans, strawberries, squash, tomatoes.

Florida's Estimated Lost Farming Acreage

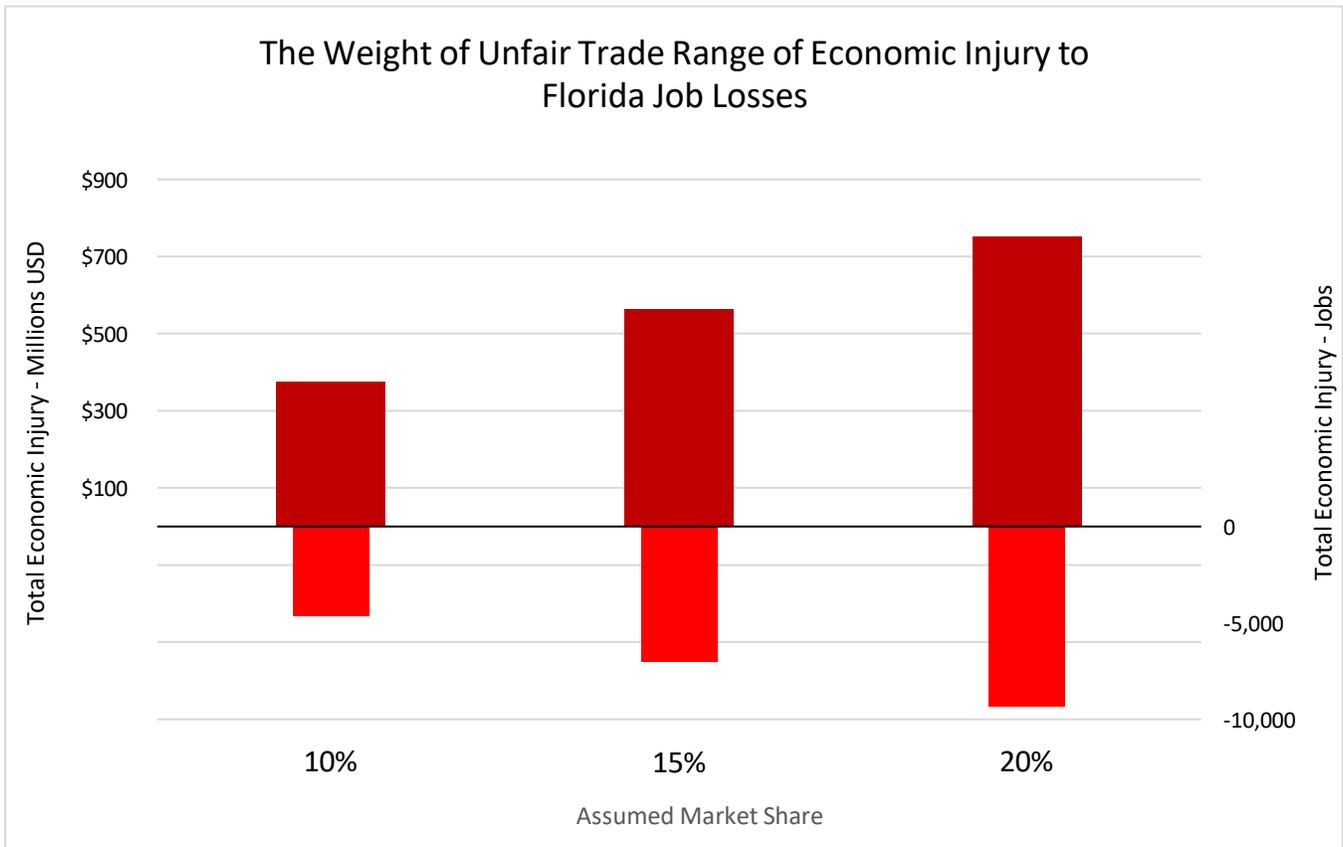
A long-term and potentially irreversible loss and injury occurs to Florida's state, county, and local governments over time as agricultural land that could have been retained, developed, or added to the existing agricultural sector is lost. These injuries occur from the artificial underutilization of farming acreage that Florida farmers would have naturally engaged in adding as specialty product demand increased. Of the 232,000 (2024 USDA Annual Statistical Bulletin) specialty crop acres throughout Florida, 42,000 and 83,000 extra acres would be required to meet the 10-20% demand.



- 13.2 Bn pounds 2023 estimate of Mexican produce quantity imported into U.S. markets.
- 4.7 Bn pounds 2023 estimate of vegetable, melon, berries, and citrus quantity produced in Florida.
- 10-20% Conservative range of the percentage of lost indirect sales revenues due to Mexican imports.
- 42-83k Range of required Florida acreage needed to produce 10-20% of the difference in weight between specialty crop imports from Mexico and Florida specialty crop production.
- \$570Mn-\$1.14Bn** Annual loss of Florida cash receipts to multiple agricultural sectors which produce an assortment of specialty crops throughout the state.

Florida's Estimated Employment Losses to the Agricultural Sector

A substantial portion of Florida's and Mexico's agricultural productions and exports is categorized as specialty crops: berries, fruits, vegetables, and citrus, as well as other items. Conservatively, a proportion, ranging from 10-20%, of the \$17.2 billion gap between Florida specialty crop value and the value of specialty crop imports from Mexico could have been added to Florida specialty crop cash receipts. This amounts to a loss of agricultural cash receipts of between \$570 million and \$1.14 billion annually to Florida.



FDACS regularly communicates cash receipts values or value of production in terms of jobs supported, indirect tax revenue, and overall economic impact to stress the importance of the Florida agriculture industry to the state's economy. These estimates are simple transformations of the value of production using multipliers derived from the University of Florida's annual study on the economic contributions of agriculture and related industries to Florida's state economy (2019). \$1 million in additional cash receipts for Florida growers supports 12.4 jobs in the state, generates \$36,892 in additional tax revenue, and contributes \$1.5187 million in overall positive effects on the state economy.

- 10-20%** Conservative range of the percentage of annually sustained lost sales from the \$17.2 billion gap between Mexico's specialty crop exports to the U.S. and Florida's current specialty crop cash receipts.

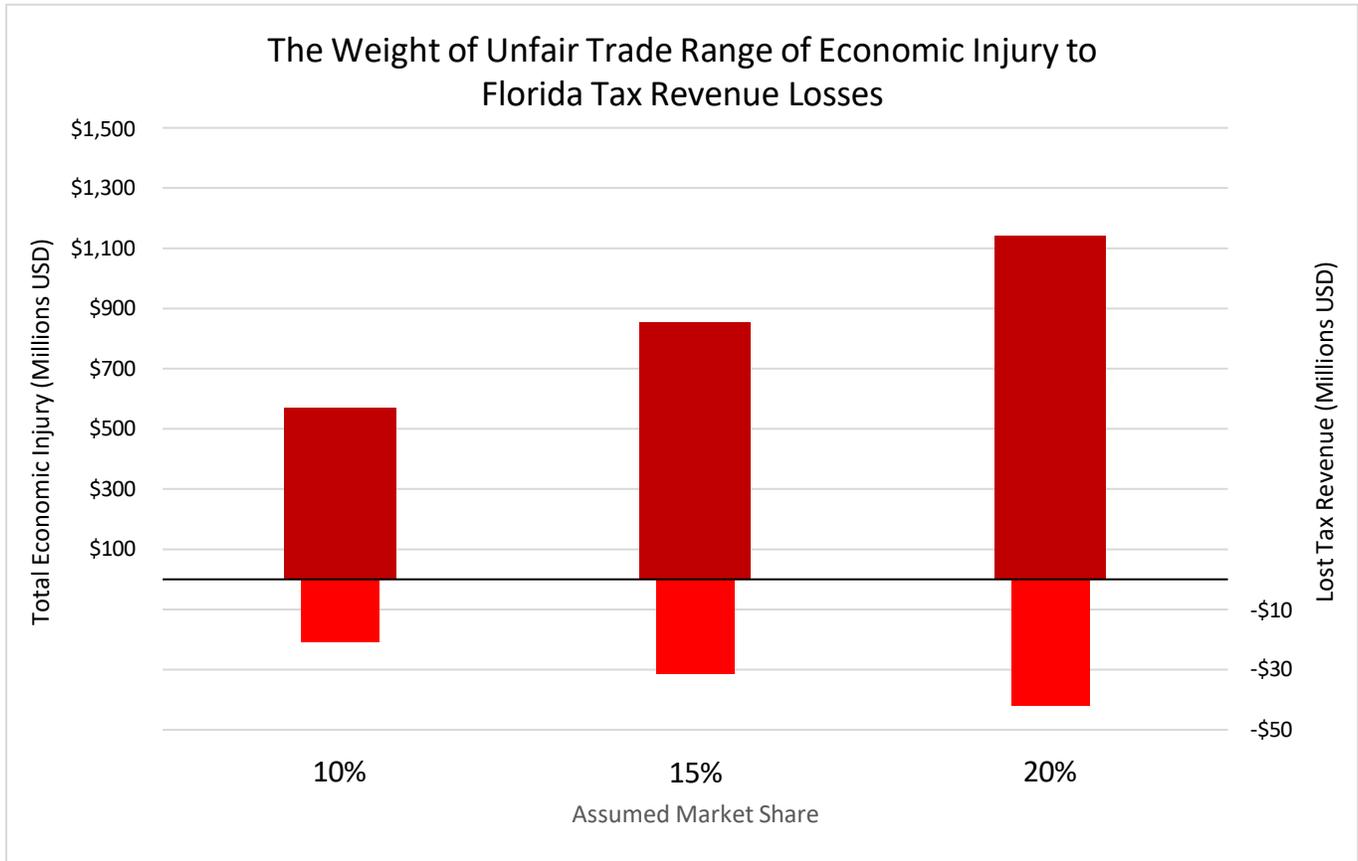
- \$570 Mn-\$1.14 Bn** Annual loss of Florida cash receipts to multiple agricultural sectors producing an assortment of specialty crops throughout the state.

- 7,072-14,144** Annual range of the total job losses in Florida's ag-based economy upon direct, indirect, and induced employment injuries from the loss of proportional estimates of unrealized agricultural sales.

- \$866 Mn-\$1.73 Bn** Annual total economic effects injury to Florida's economy based upon direct, indirect, and induced impacts from the loss of unrealized agricultural sales.

Florida’s Estimated Lost Agricultural Sales and Indirect Tax Revenue Losses

A secondary injury occurs to Florida’s state, county, and local governments as millions of dollars are lost from the sales revenues in the form of unrealized indirect tax revenues. Most of these injuries will be focused in 20 or so of the state’s 67 counties; however, every county has some amount of specialty crop production. This amounts to a loss of agricultural indirect tax revenue receipts of between \$21.0-\$42.1 million annually to Florida.



FDACS regularly communicates cash receipts values or value of production in terms of jobs supported, indirect tax revenue, and overall economic impact to stress the importance of the Florida agriculture industry to the state’s economy. These estimates are simple transformations of the value of production using multipliers derived from the University of Florida’s annual study on the economic contributions of agriculture and related industries to Florida’s state economy (2019). \$1 million in additional cash receipts for Florida growers supports 12.4 jobs in the state, generates \$36,892 in additional tax revenue, and contributes \$1.5187 million in overall positive effects on the state economy.

- 10-20%** Conservative range of the percentage of lost indirect sales revenues from the \$570 million-\$1.14 billion, which would have naturally evolved as part of the total annual Florida specialty crop cash receipts.
- \$570 Mn-\$1.14 Bn** Annual loss of Florida cash receipts to multiple agricultural sectors, which produce an assortment of specialty crops throughout the state.
- \$21.0-\$42.1 Mn** Annual range of the total indirect tax revenue losses in Florida ag-based economy upon injuries from the loss of unrealized agricultural sales.

DEEPER ANALYSIS OF SEVEN FLORIDA COMMODITIES

The following pages utilize analytics to examine Mexican competition as it relates to Florida production over the last two decades to market share positions between Florida and Mexico and any notable differentials within the last five years in seven different commodities: bell peppers, fresh tomatoes, strawberries, blueberries, cucumbers, squash, and sweet corn.

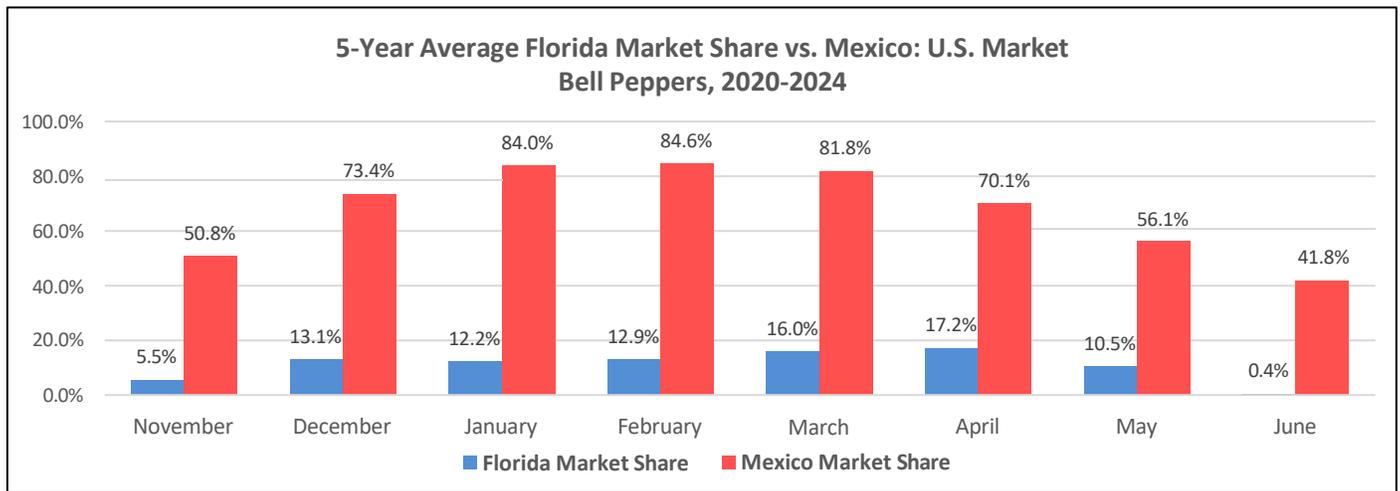
BELL PEPPER Analytics/Market Share Shifts



- 73.4%** Loss of Florida Market Share between 2004 and 2024.
- +110.4%** Mexico’s increase in Market Share in the U.S. between 2004 and 2024.
- +52.0%** Change in total U.S. supply between 2004 and 2024 is 580 million pounds.

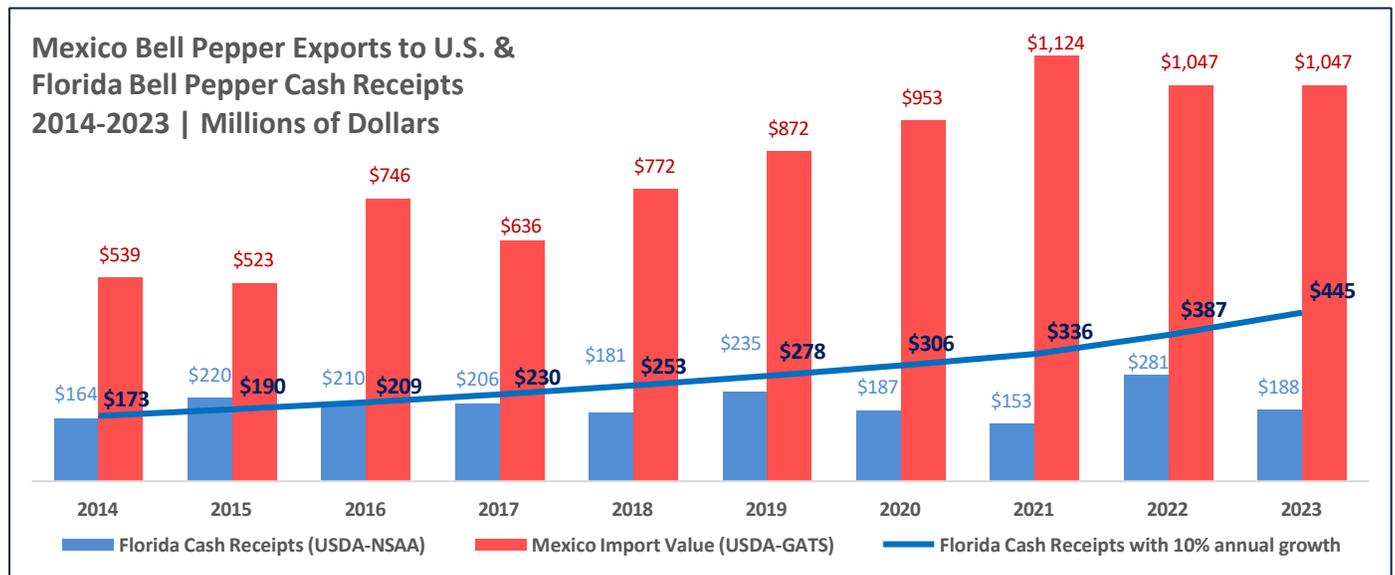
Examining the fresh bell pepper market competitive environment provides insight into how price and supply are used aggressively/leveraged in the marketplace by Mexico. From December through April, Florida and Mexico provide 93.0% of the U.S. supply of bell peppers, nearly 206.2 million crates (28 lbs/crate) between the two regions.

The greatest impact to Florida Bell Peppers is from November to June, as indicated in the 5-year average below.



The economic injury to Florida Bell Peppers is compounded by the loss of growth in sales in addition to the losses estimated that occurred due to lower pricing.

- The value of Mexican Bell Pepper imports to the U.S. grew 9.4% annually on average between 2014 and 2023.
- Florida Bell Pepper cash receipts average annual growth between 2014 and 2023 was 1.4%.



94.3% Expansion of the value of Mexican products from 2014 to 2023.

\$1.01 Bn Mexico's average value exported from 2019-2023.

14.4% Expansion of the value of Florida products from 2014 to 2023.

\$209 Mn Florida average production value from 2019-2023.

\$445 Mn 2023 cash receipts of Florida Bell Peppers, if a conservative **10% growth rate** is applied to Florida.

Historical Supply of Florida Production and Mexican Bell Pepper Exports to the U.S.

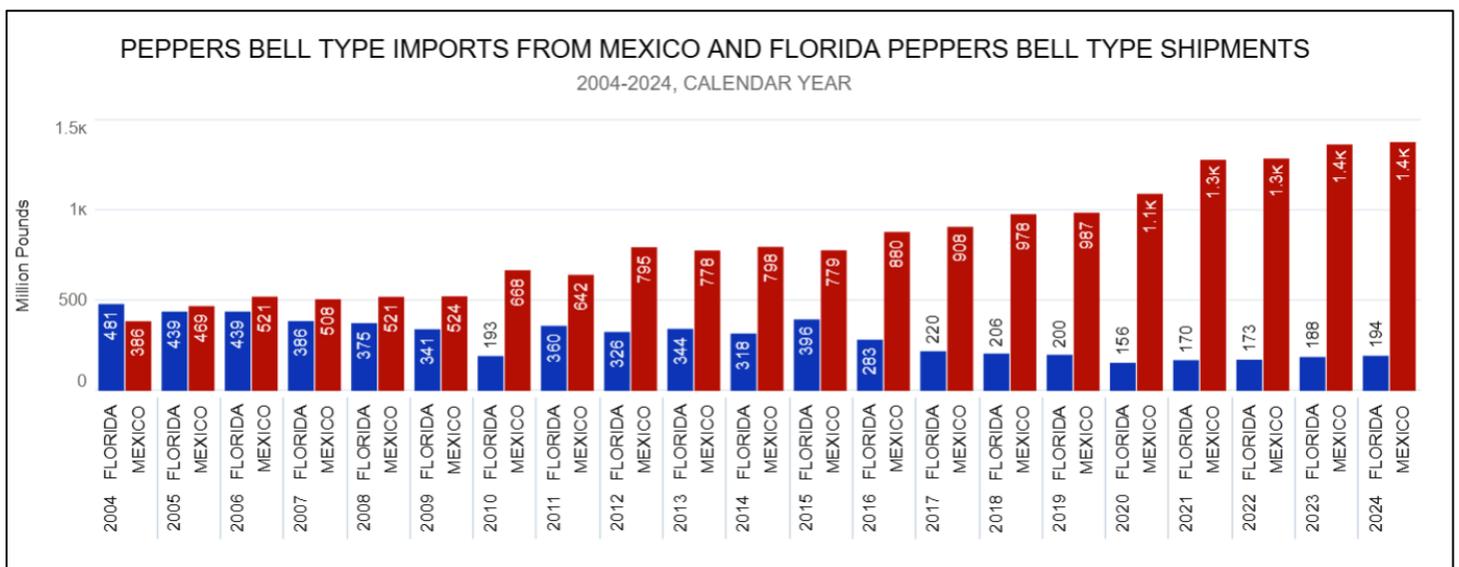
Mexican exports remained between 300-500 million pounds from 2003-2010, and more bell peppers began flowing into the U.S. beginning in 2011 (surpassing 600 million pounds) and continued to expand, exceeding 800 million pounds by 2016. For each additional 50 million pounds, about 1,000 supermarkets could be supplied for a year, or some 9,600 stores by 2019. Comparing the relative supply positions of Florida and Mexico: In 2004 (**FL=42.5%**; **MX=34.1%**), they are significantly reversed by 2024 (**MX=72.8%**; **FL 10.3%**). Total demand for the product expanded as well.

257.2% Expansion of Mexican products from 2004 to 2024.

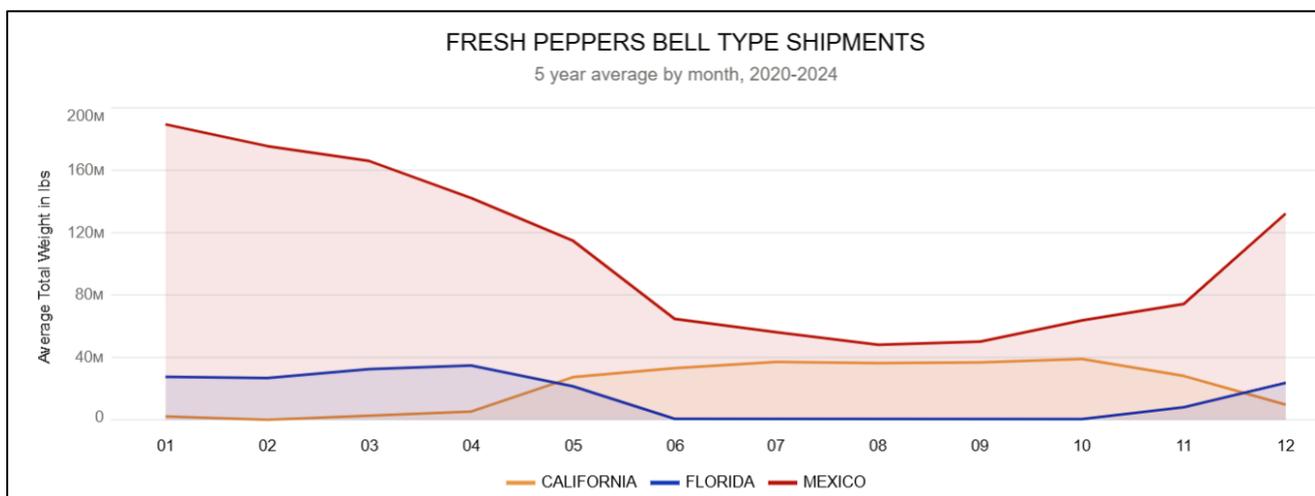
1.28 Bn pounds Mexico's average number of pounds exported from 2020-2024.

-59.6% Decline of Florida products from 2004 to 2024.

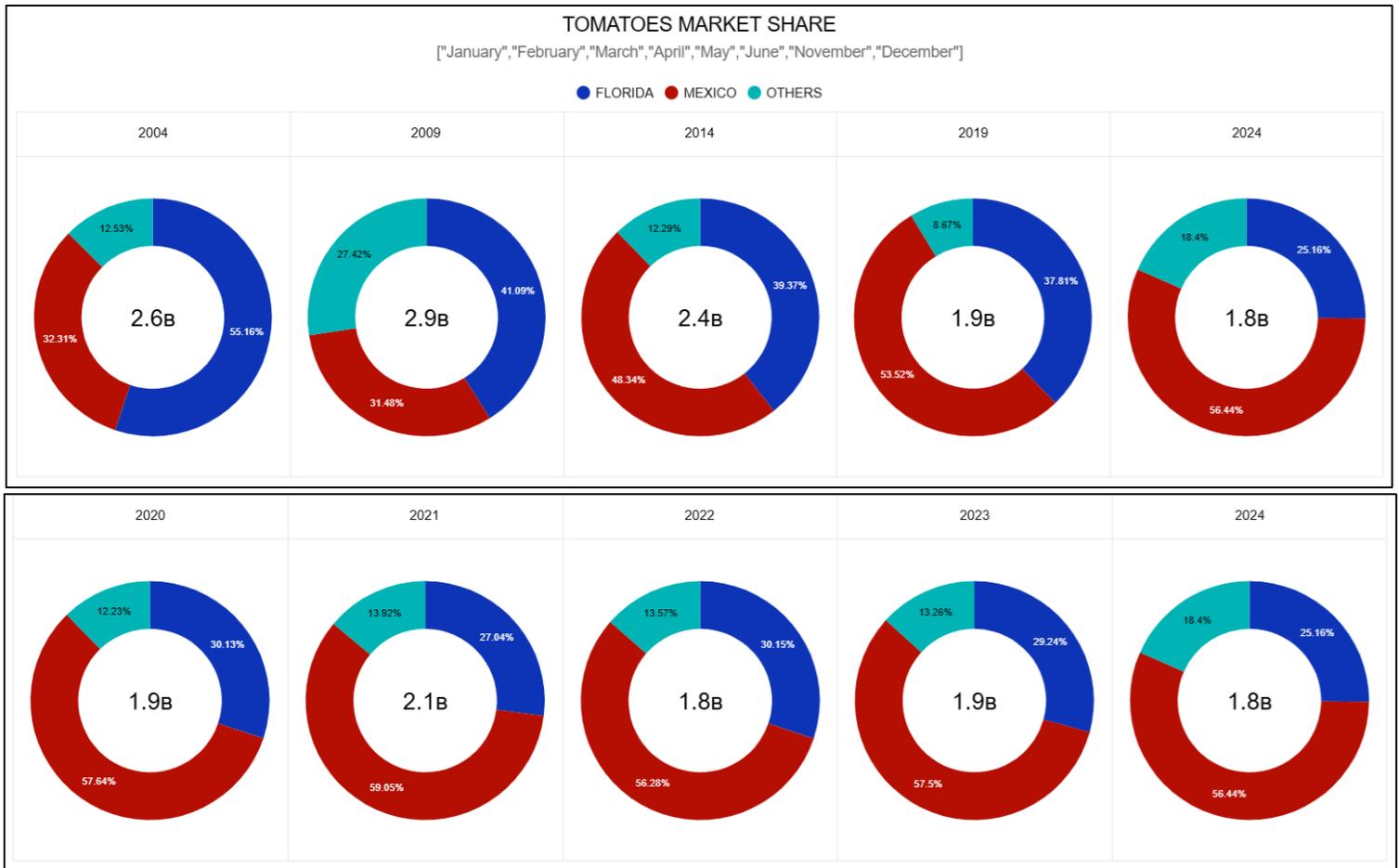
176 Mn pounds Florida's average number of pounds produced from 2020-2024.



The greatest export of Mexican Bell Peppers to the U.S. market occurs during the Florida Bell Pepper seasonal production from November to June, while California Bell Pepper production lasts from April to December.



TOMATO Analytics/Market Share Shifts



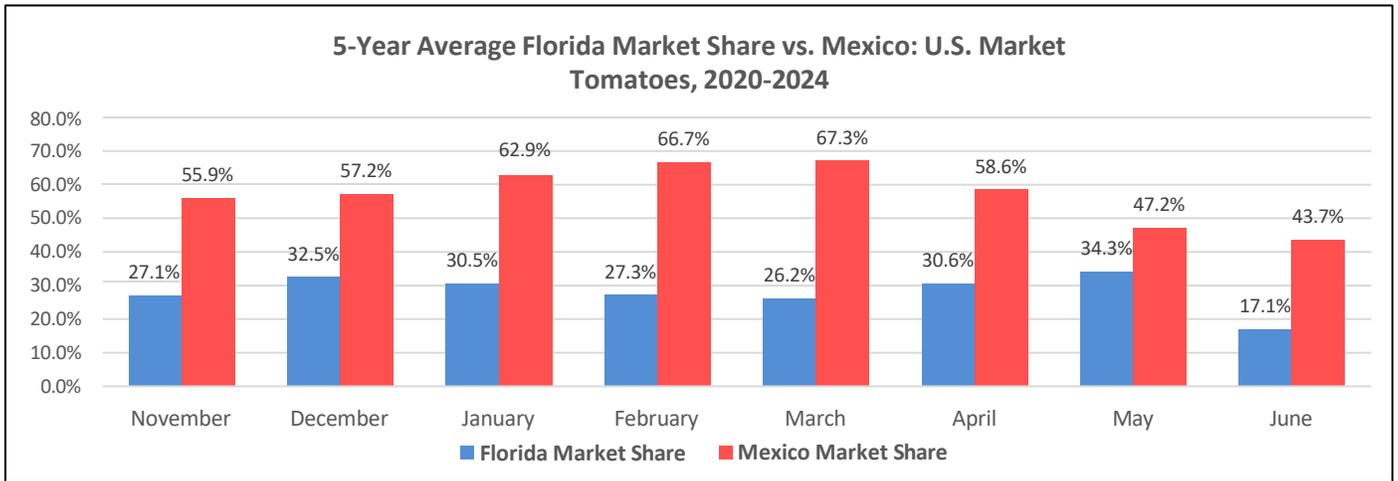
-54.4% Loss of Florida Market Share between 2004 and 2024.

+74.7% Mexico's increase in Market Share in the U.S. between 2004 and 2024.

-30.9% Change in total U.S. supply between 2004 and 2024 is down 800 million pounds.

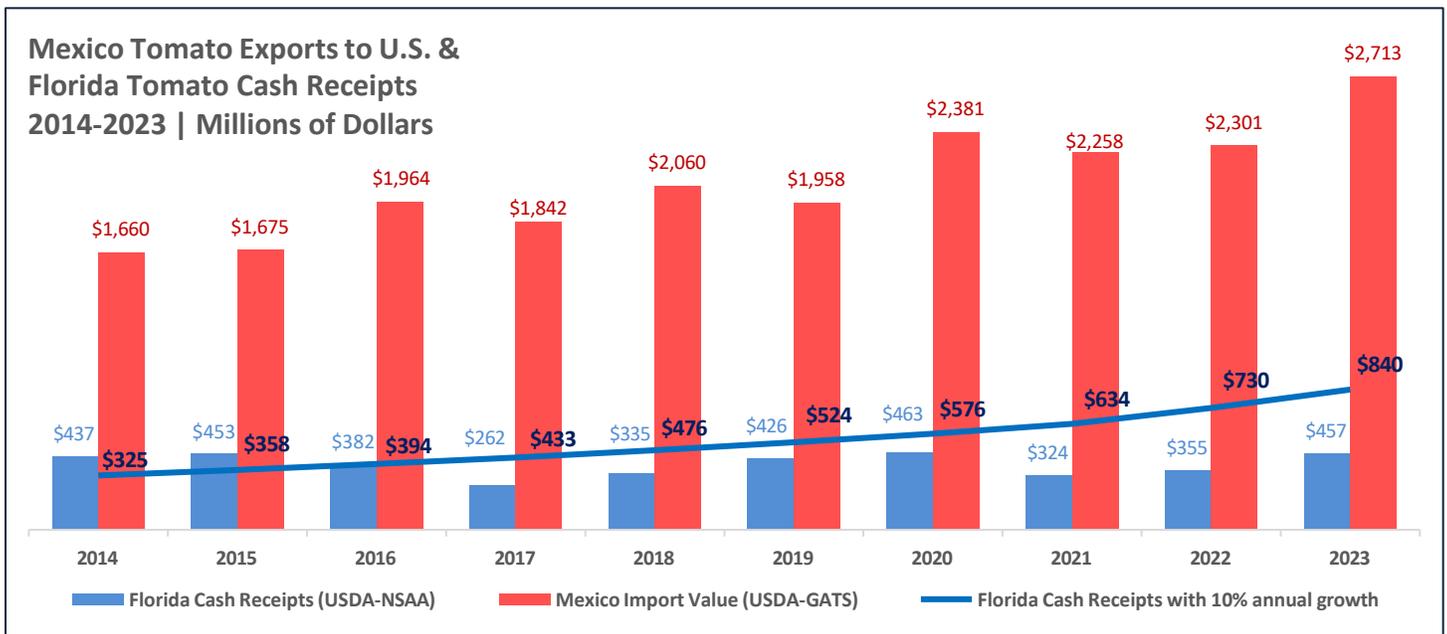
Examining the fresh tomato (rounds) market competitive environment provides insight into how price and supply are used aggressively/leveraged in the marketplace by Mexico. From December through March, Florida and Mexico provide 92.6% of the U.S. supply of tomatoes (rounds), nearly 176 million cartons (25 lbs/carton) between the two regions.

The greatest impact to Florida Tomatoes is from November to June, as indicated in the 5-year average below.



The economic injury to Florida Tomatoes is compounded by the loss of growth in sales in addition to the losses estimated that occurred due to lower pricing.

- The value of Mexican Tomato imports to the U.S. grew 6.3% annually on average between 2014 and 2023.
- Florida Tomato cash receipts average annual growth between 2014 and 2023 was 0.5%.



63.4% Expansion of the value of Mexican products from 2014 to 2023.

\$2.32 Bn Mexico’s average value exported from 2019-2023.

4.5% Expansion of the value of Florida products from 2014 to 2023.

\$405 Mn Florida’s average production value from 2019-2023.

\$840 Mn 2023 cash receipts of Florida Tomatoes, if a conservative **10% growth rate** is applied to Florida.

Historical Supply of Florida Production and Mexican Tomatoes Exports to the U.S.

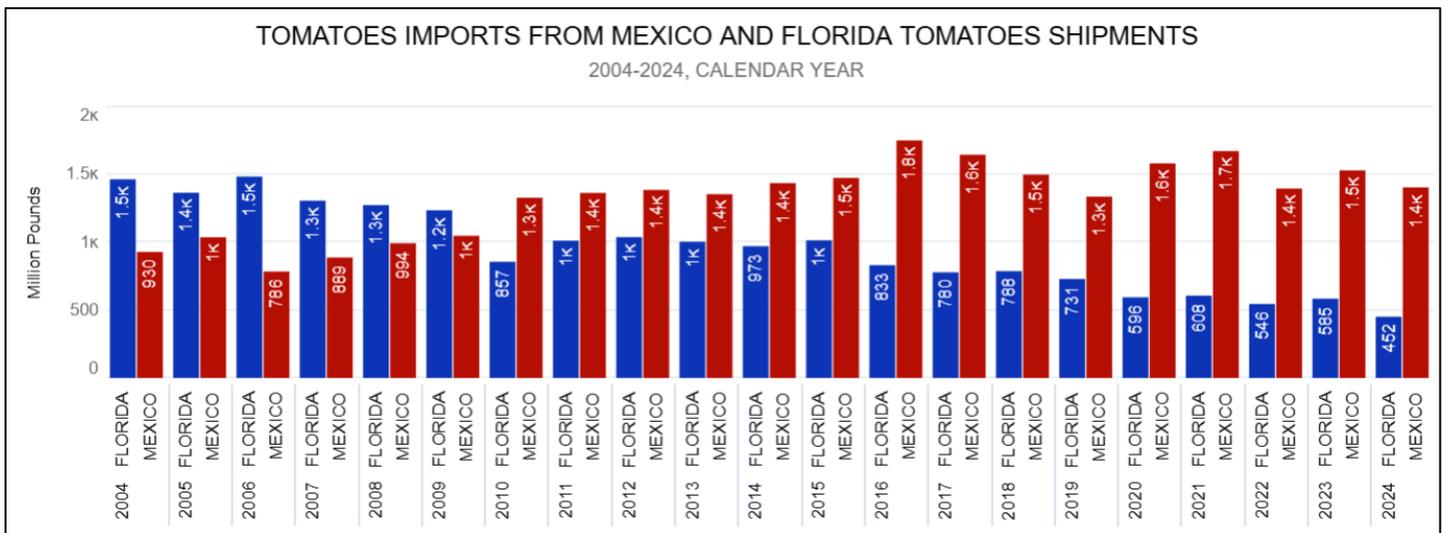
Mexican exports remained on a steady course of expansion for much of the period between 2003-2016 and first exceeded Florida in 2010, which was also a year that a freeze curtailed significant production in Florida. Comparing the relative supply positions of Florida and Mexico: In 2004 (**FL=40.9%; MX=25.9%**) and they are reversed in 2024 (**MX=51.5%; FL 16.6%**).

51.2% Expansion of Mexican products from 2004 to 2024.

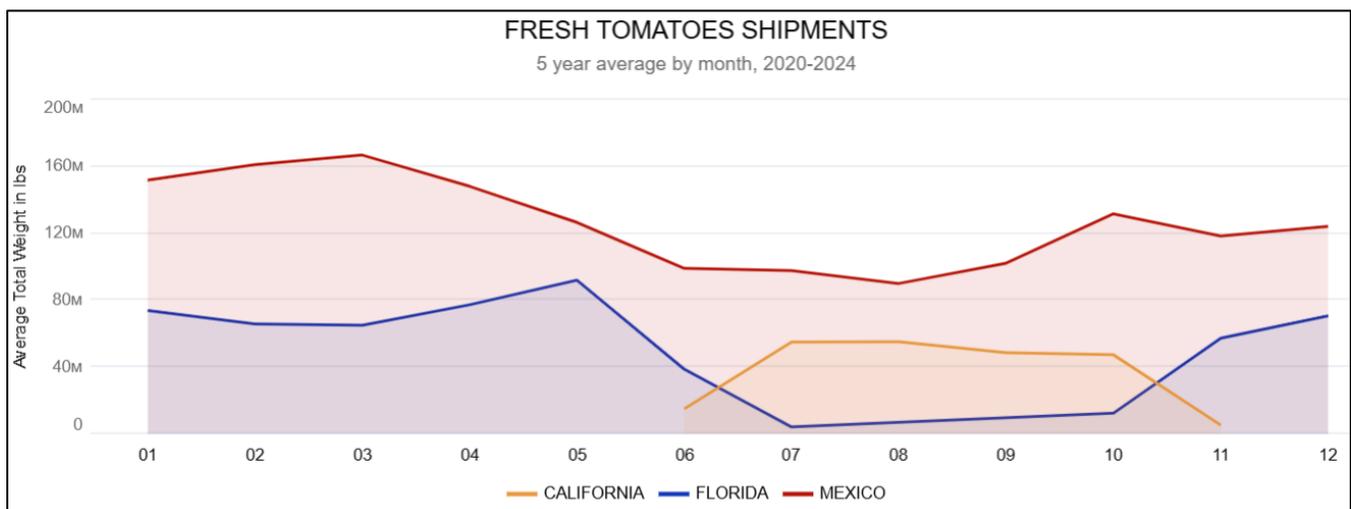
1,518 Mn pounds Mexico's average number of pounds exported from 2020-2024.

-69.2% Decline of Florida products from 2004 to 2024.

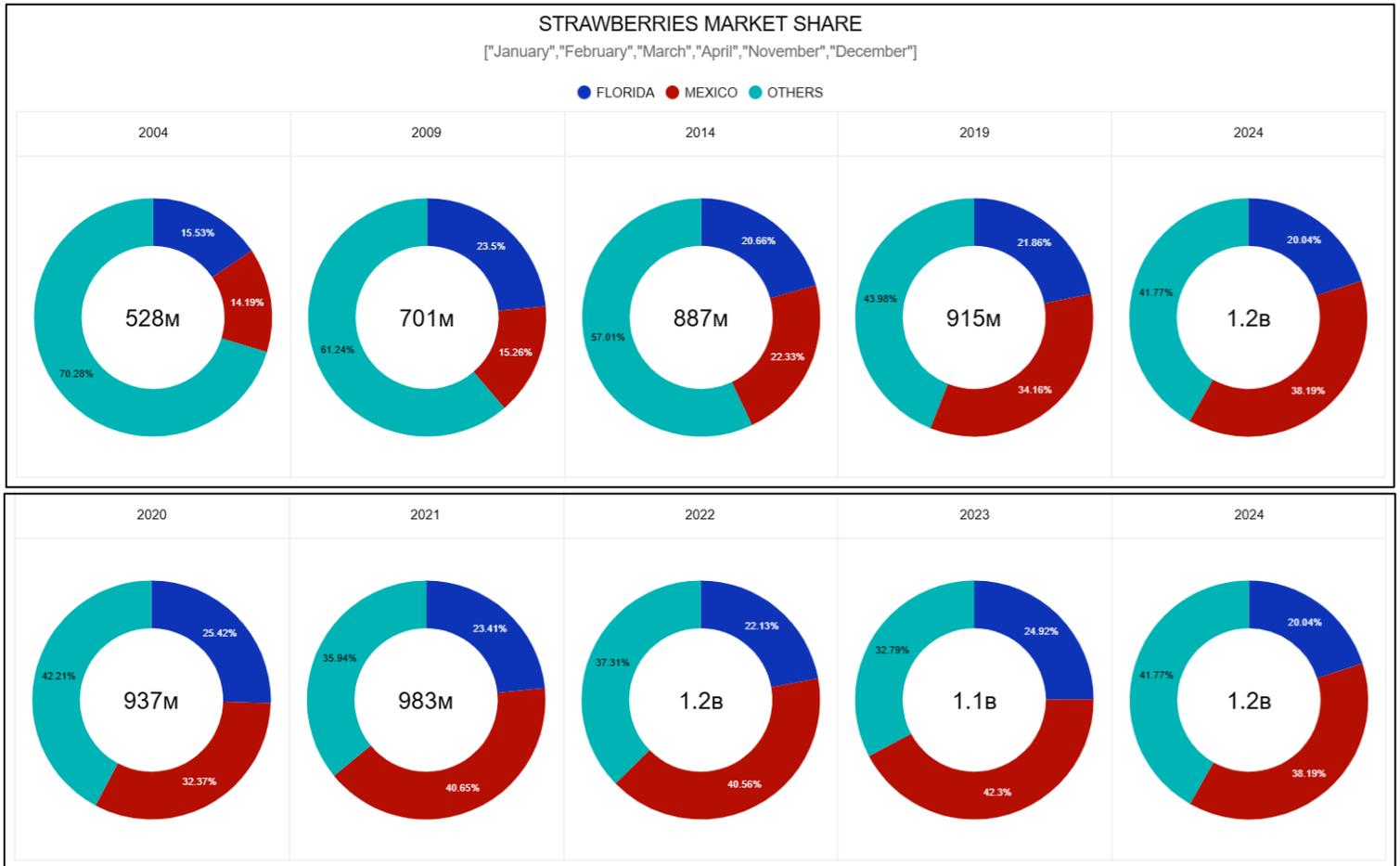
557 Mn pounds Florida's average number of pounds produced from 2020-2024.



The greatest export of Mexican Tomatoes to the U.S. market occurs during the Florida Tomato seasonal production from November to June, while California's Tomato production lasts from June to November.



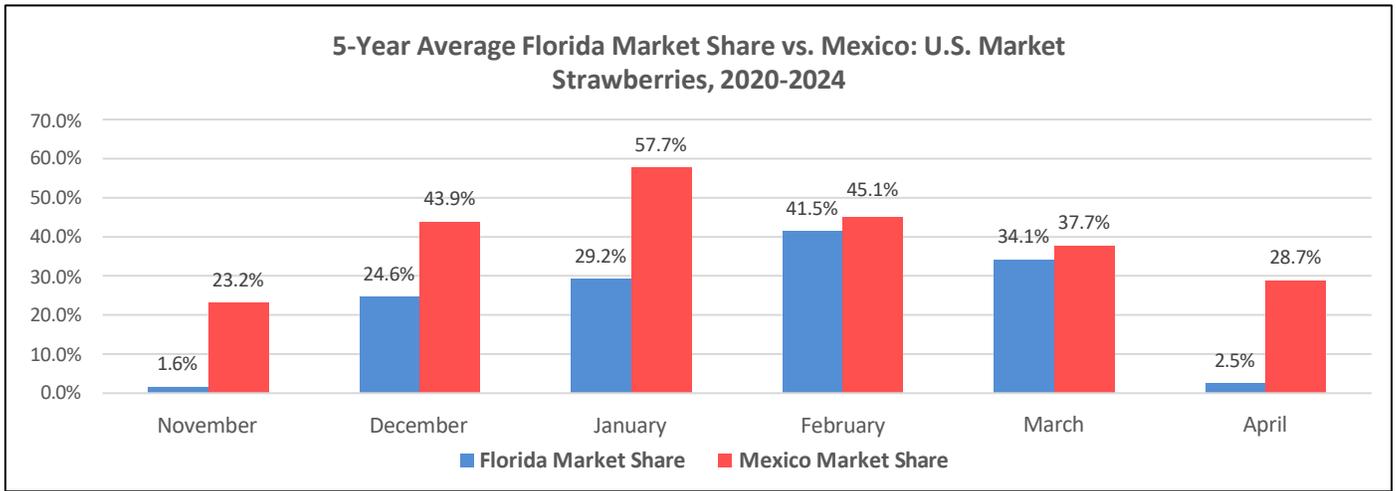
STRAWBERRY Analytics/Market Share Shifts



- +29.0%** Florida's increase in Market Share in the U.S. between 2004 and 2024.
- +169.1%** Mexico's increase in Market Share in the U.S. between 2004 and 2024.
- +132.3%** Change in total U.S. supply between 2004 and 2024 is 698 million pounds.

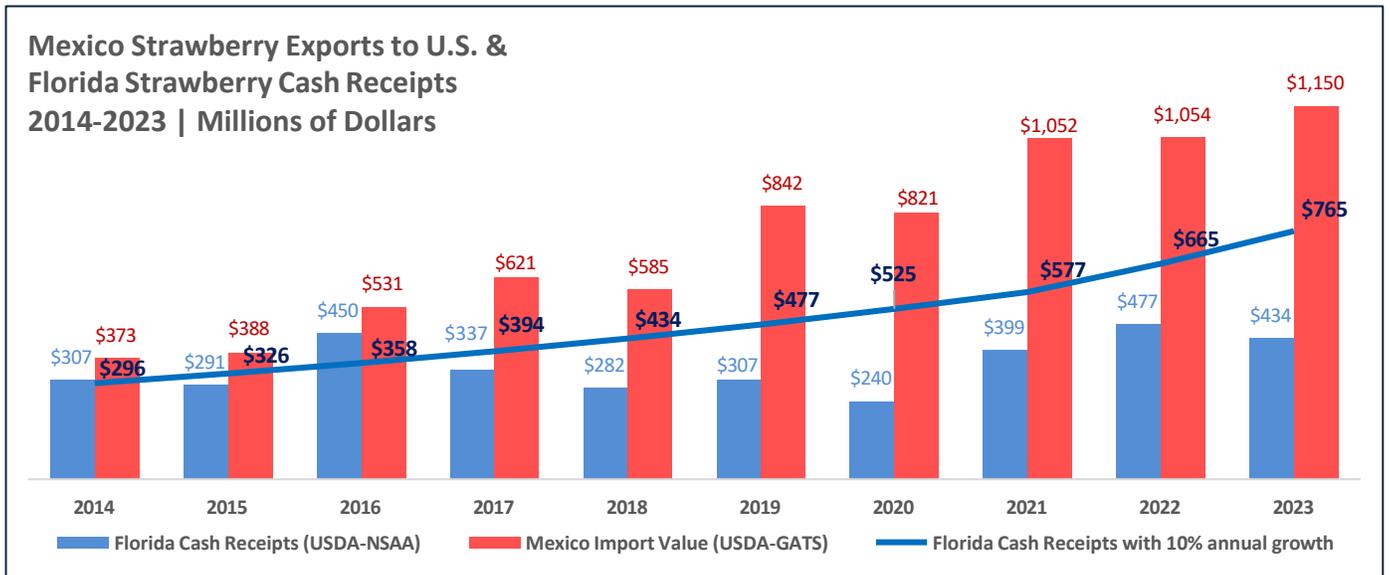
Examining the fresh strawberry market's competitive environment provides insight into how price and supply are used aggressively/leveraged in the marketplace by Mexico. From December through February, Florida and Mexico provide 80.7% of the U.S. supply of strawberries, nearly 163.5 million flats (12 lbs/flat) between the two regions.

The greatest impact to Florida Strawberries is from November to April, as indicated in the 5-year average below.



The economic injury to Florida Strawberries is compounded by the loss of growth in sales in addition to the losses estimated that occurred due to lower pricing.

- The value of Mexican Strawberry imports to the U.S. grew 23.2% annually on average between 2014 and 2023.
- Florida Strawberry cash receipts average annual growth between 2014 and 2023 was 4.1%.



207.9% Expansion of the value of Mexican products from 2014 to 2023.

\$984 Mn Mexico’s average value exported from 2019-2023.

41.5% Expansion of the value of Florida products from 2014 to 2023.

\$371 Mn Florida’s average production value from 2019-2023.

\$764 Mn 2023 cash receipts of Florida Strawberries, if a conservative **10% growth rate** is applied to Florida.

Historical Supply of Florida Production and Mexican Strawberry Exports to the U.S.

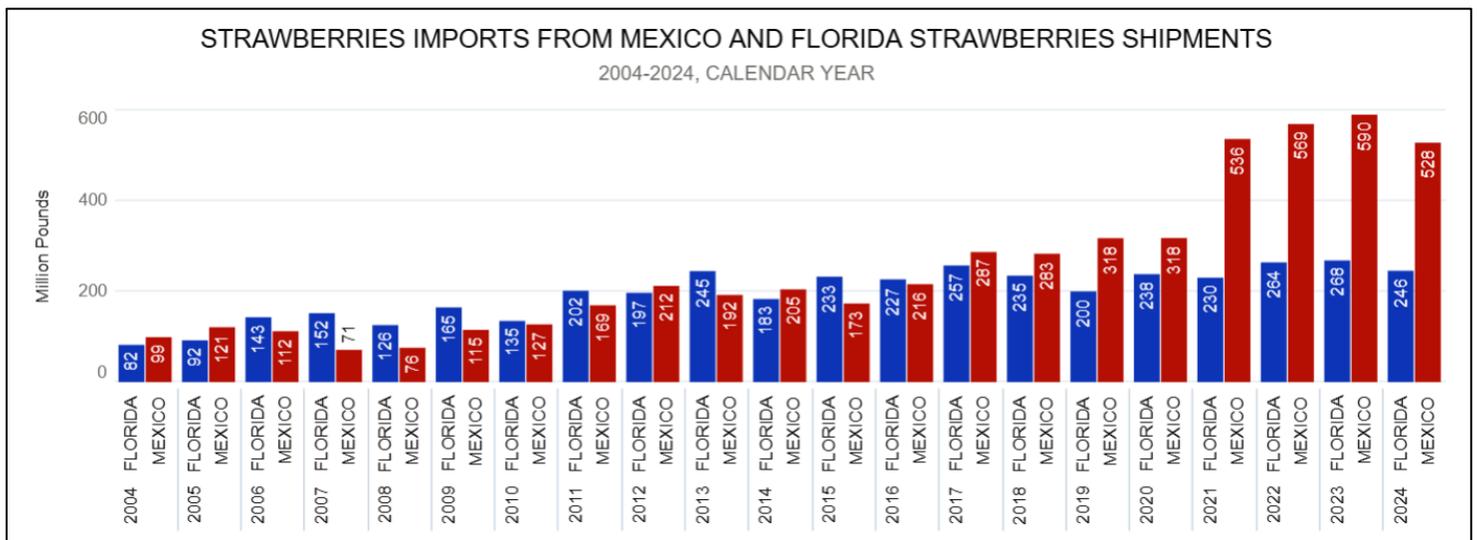
Mexican exports remained between 70-150 million pounds from 2003-2010. More strawberries began flowing to the eastern U.S. beginning in 2011. By 2011, a new trend was emerging with significantly more Mexican products being shipped eastward across the U.S. markets. Comparing the relative supply positions of Florida and Mexico: in 2004 (**FL=6.5%; MX=7.8%**) and the gap widened in 2024 (**MX=18.7%; FL 8.7%**). Total demand for the product expanded as well.

+433.1% Expansion of Mexican products from 2004 to 2024.

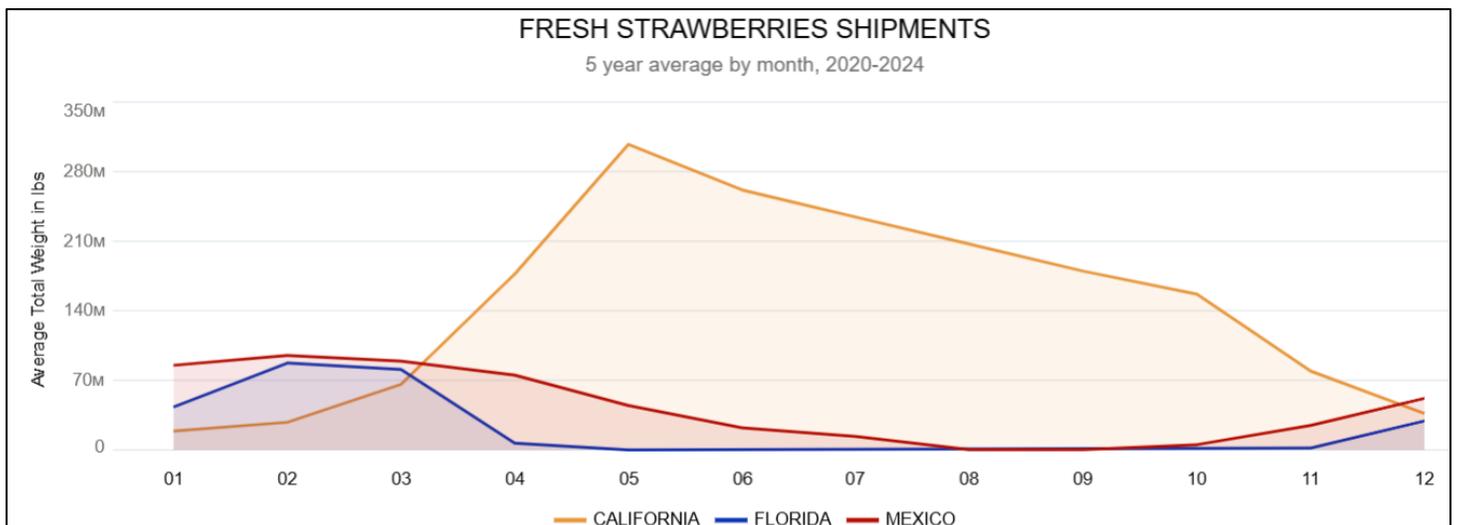
508 Mn pounds Mexico's average number of pounds exported from 2020-2024.

+199.2% Expansion of Florida products from 2004 to 2024.

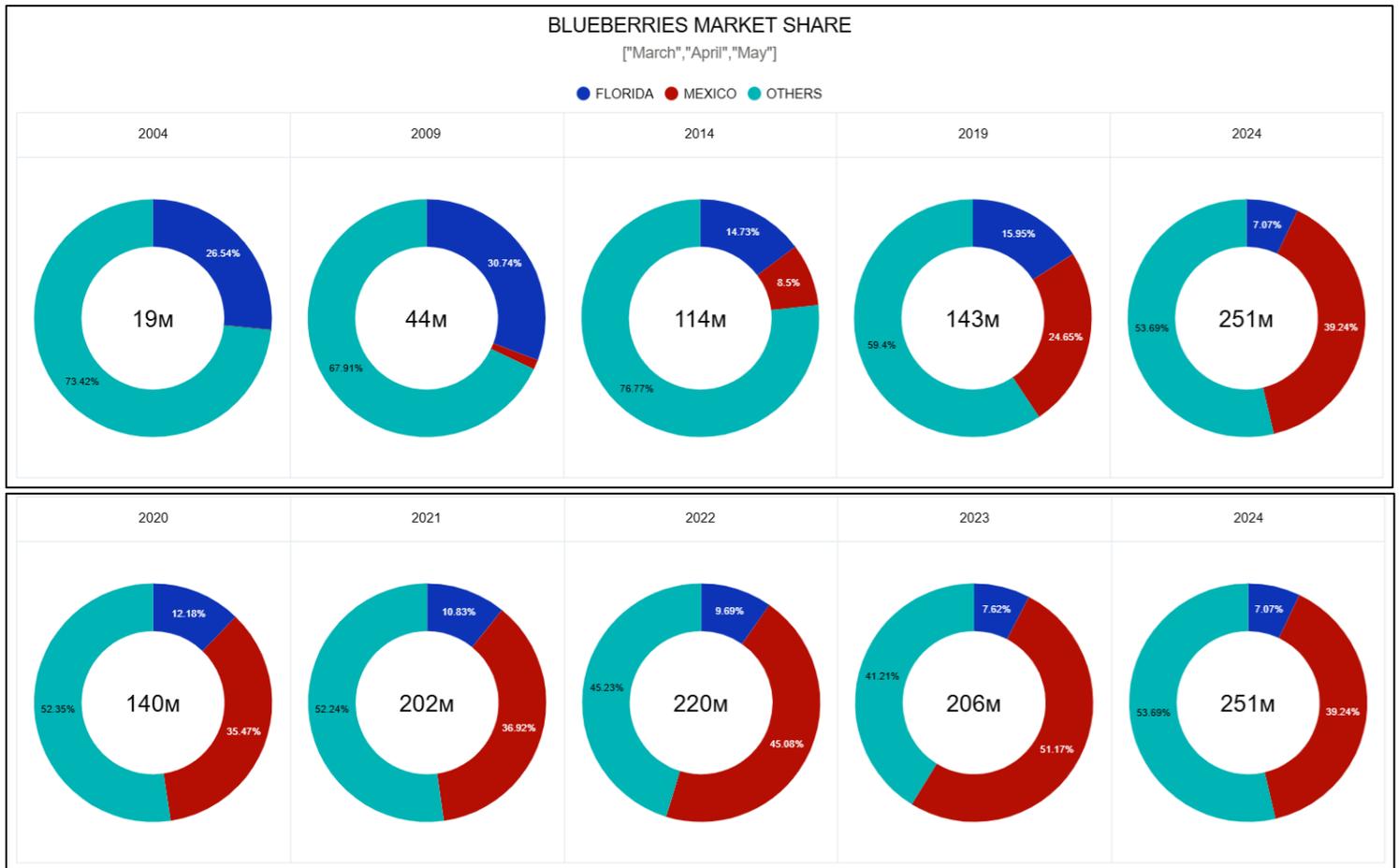
249 Mn pounds Florida's average number of pounds produced from 2020-2024.



The greatest export of Mexican Strawberries to the U.S. market occurs during the Florida Strawberry seasonal production from November to April, while California Strawberry production ramps up from March to April.



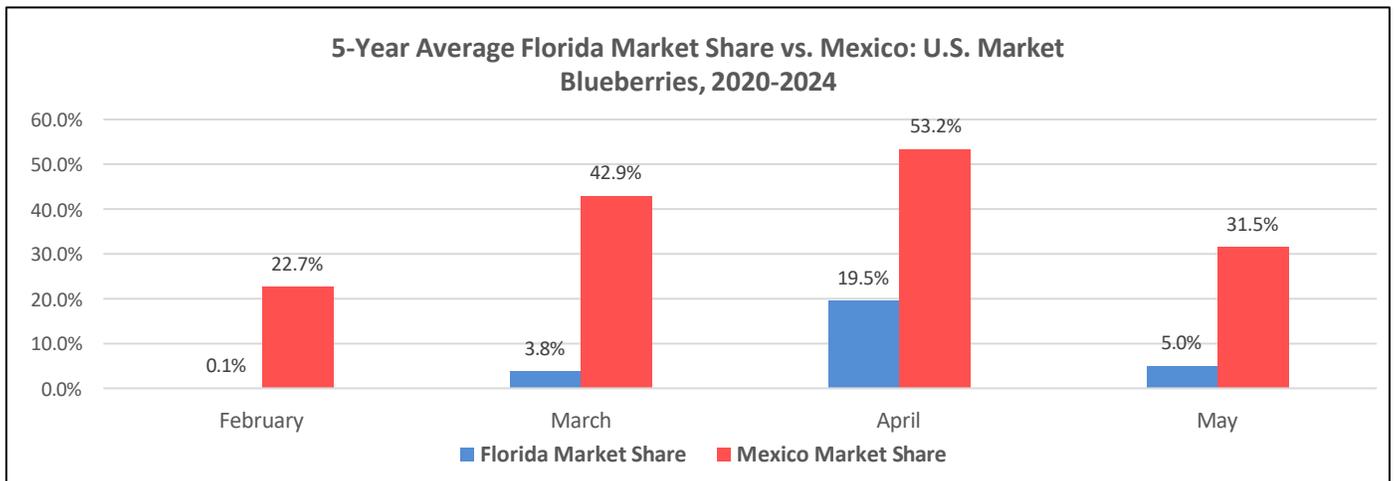
BLUEBERRY Analytics/Market Share Shifts



- 52.0% Loss of Florida Market Share between 2014 and 2024.
- +361.8% Mexico's increase in Market Share in the U.S. between 2014 and 2024.
- +120.6% Change in total U.S. supply between 2014 and 2024 is 137 million pounds.

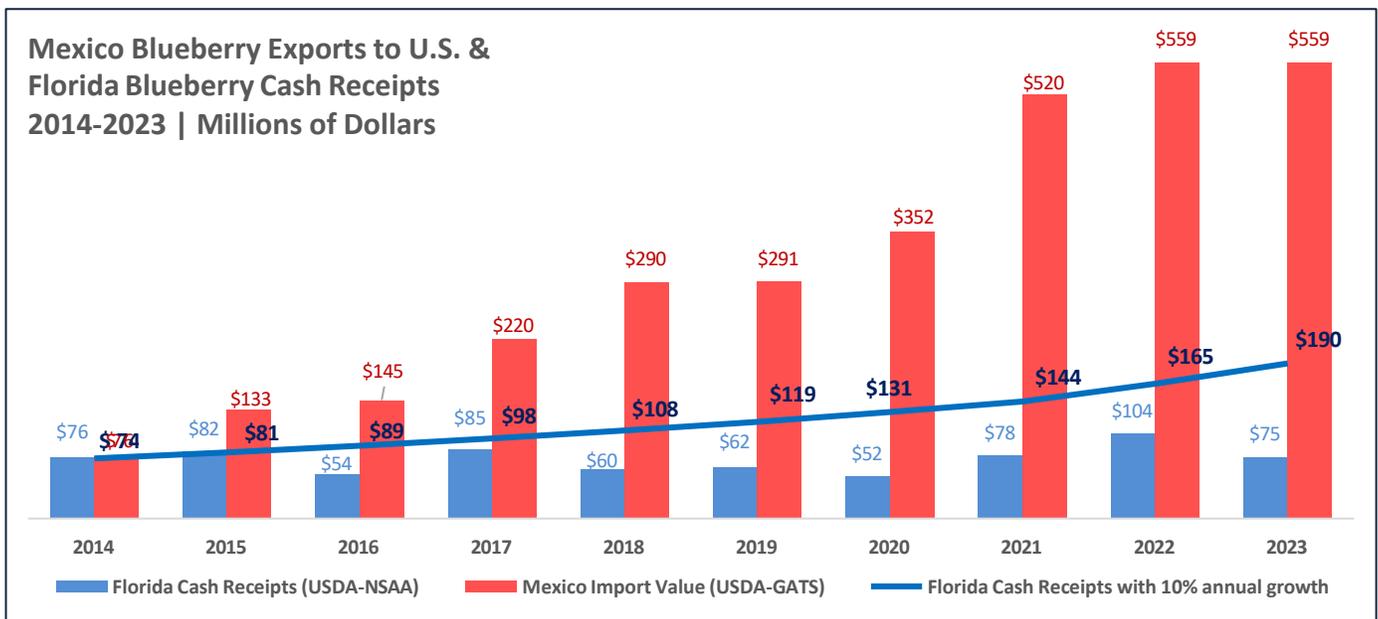
Examining the fresh blueberry market competitive environment provides insight into how price and supply are used aggressively/leveraged in the marketplace by Mexico. From March through May, Florida and Mexico provide 52.0% of the U.S. supply of blueberries, about 47.3 million flats (11 lbs/flat) between the two regions.

The greatest impact to Florida Blueberries is from March to May, as indicated in the 5-year average below.



The economic injury to Florida Blueberries is compounded by the loss of growth in sales in addition to the losses estimated that occurred due to lower pricing.

- The value of Mexican Blueberry imports to the U.S. grew 63.4% annually on average between 2014 and 2023.
- Florida Blueberry cash receipts average annual growth between 2014 and 2023 was 0.08%.



634.5% Expansion of the value of Mexican products from 2014 to 2023.

\$56 Mn Mexico's average value exported from 2019-2023.

0.79% Expansion of the value of Florida products from 2014 to 2023.

\$74.1 Mn Florida's average production value from 2019-2023.

\$190 Mn 2023 cash receipts of Florida Blueberries, if a conservative **10% growth rate** is applied to Florida.

Historical Supply of Florida Production and Mexican Blueberry Exports to the U.S.

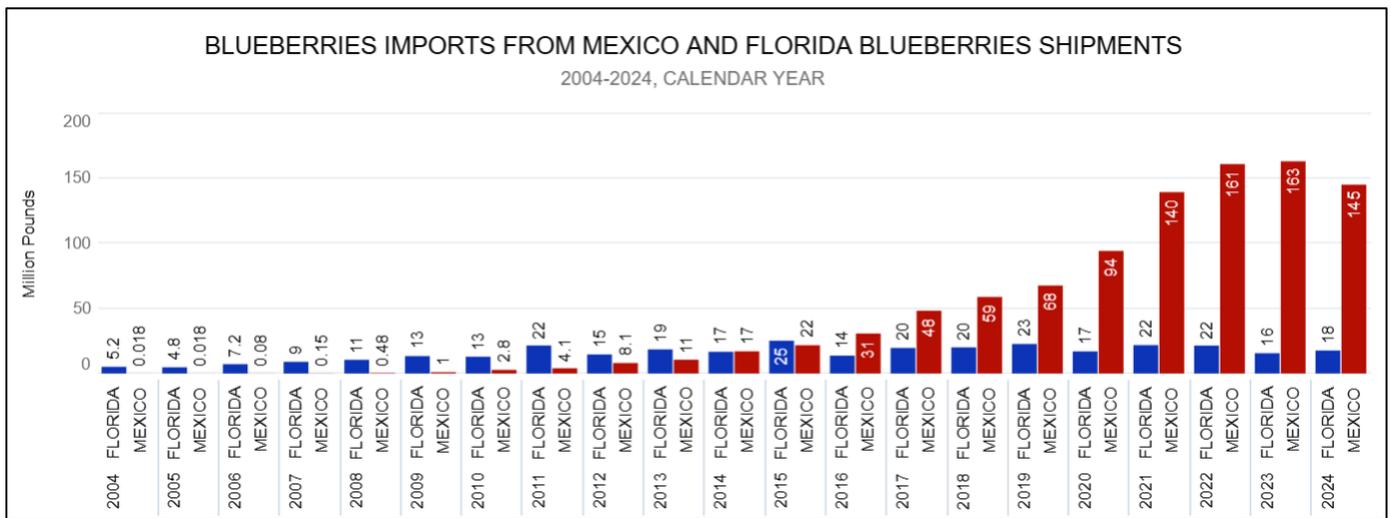
Mexican exports remained relatively minor from 2003-2010, when an accelerated expansion of products began flowing into the U.S. Growth in Florida Blueberry production shows signs of injury by 2011, which continues as Mexican product achieves parity with Florida in 2014. Continued saturation from Mexico appears to have damaged Florida's market. Comparing the relative supply positions of Florida and Mexico: In 2004 (**FL=3.5%**; **MX=0.0%**) and they are reversed in 2024 (**MX=16.0%**; **FL 2.0%**). Total demand for the product expanded as well.

749.9% Expansion of Mexican products from 2014 to 2024.

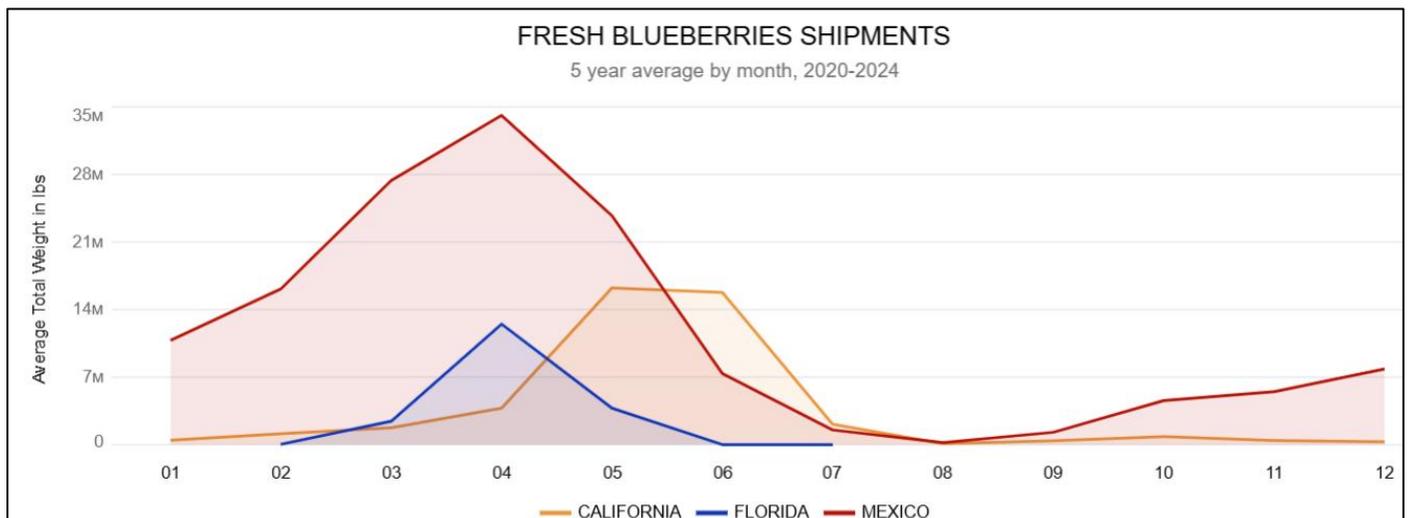
141 Mn pounds Mexico's average number of pounds exported from 2020-2024.

-47.5% Reduction of Florida products from 2014 to 2024.

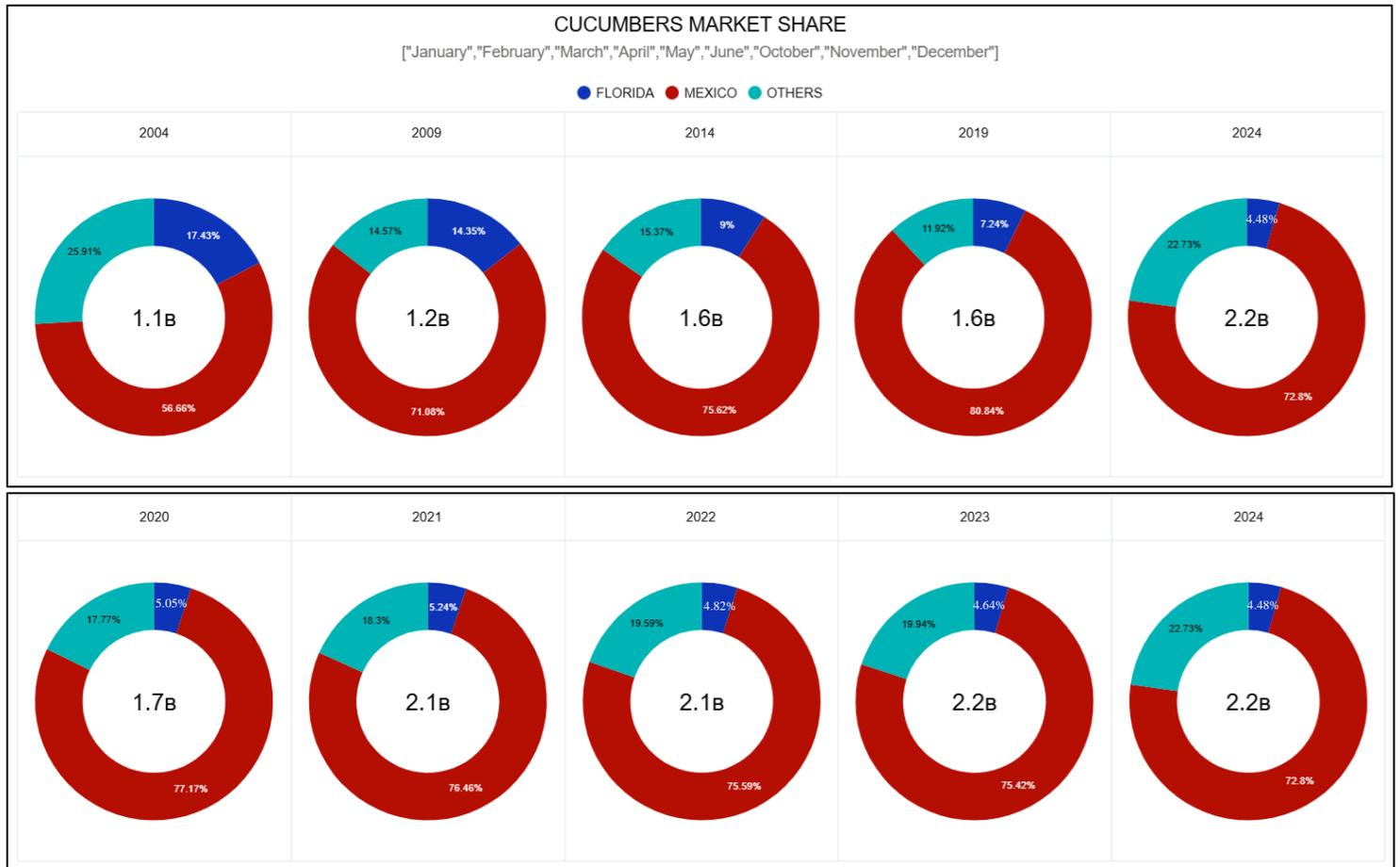
18.8 Mn pounds Florida's average number of pounds produced from 2020-2024.



The greatest export of Mexican Blueberries to the U.S. market occurs during the Florida Blueberry seasonal production from March to May, while California Blueberry production lasts from February to July.



CUCUMBER Analytics/Market Share Shifts



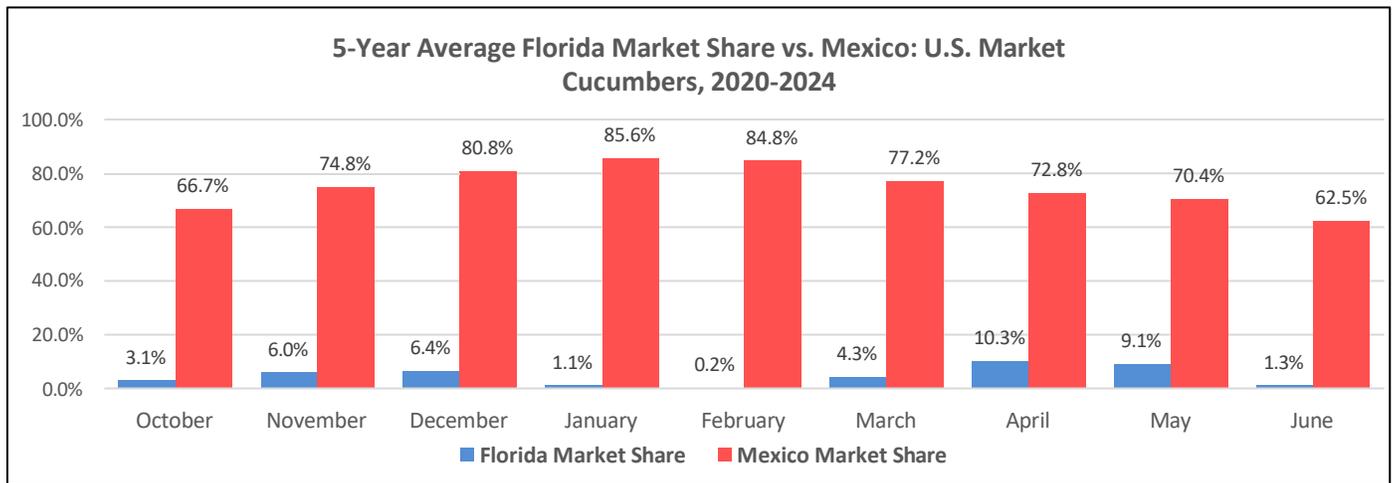
-74.3% Loss of Florida Market Share between 2004 and 2024.

+28.5% Mexico's increase in Market Share in the U.S. between 2004 and 2024.

+111.0% Change in total U.S. supply between 2004 and 2024 is up 1,178 million pounds.

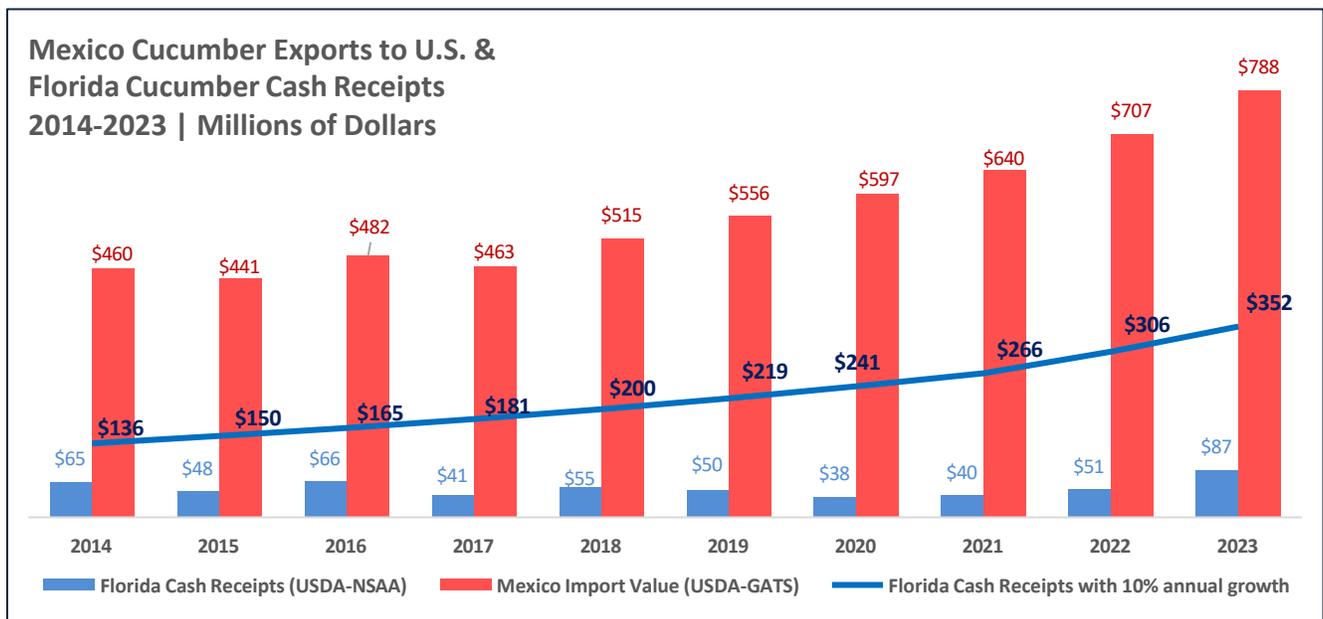
Examining the fresh cucumber market competitive environment provides insight into how price and supply are used aggressively/leveraged in the marketplace by Mexico. From March through May, Florida and Mexico provide 81.4% of the U.S. supply of cucumbers, about 56.6 million bushels (55 lbs/bushel) between the two regions.

The greatest impact to Florida Cucumbers is from October to June, as indicated in the 5-year average below.



The economic injury to Florida Cucumbers is compounded by the loss of growth in sales in addition to the losses estimated that occurred due to lower pricing.

- The value of Mexican Cucumber imports to the U.S. grew 7.1% annually on average between 2014 and 2023.
- Florida Cucumber cash receipts average annual growth between 2014 and 2023 was 3.3%.



71.5% Expansion of the value of Mexican products from 2014 to 2023.

\$658 Mn Mexico's average value exported from 2019-2023.

33.2% Expansion of the value of Florida products from 2014 to 2023.

\$53.3 Mn Florida's average production value from 2019-2023.

\$352 Mn 2023 cash receipts of Florida Cucumbers, if a conservative **10% growth rate** is applied to Florida.

Historical Supply of Florida Production and Mexican Cucumber Exports to the U.S.

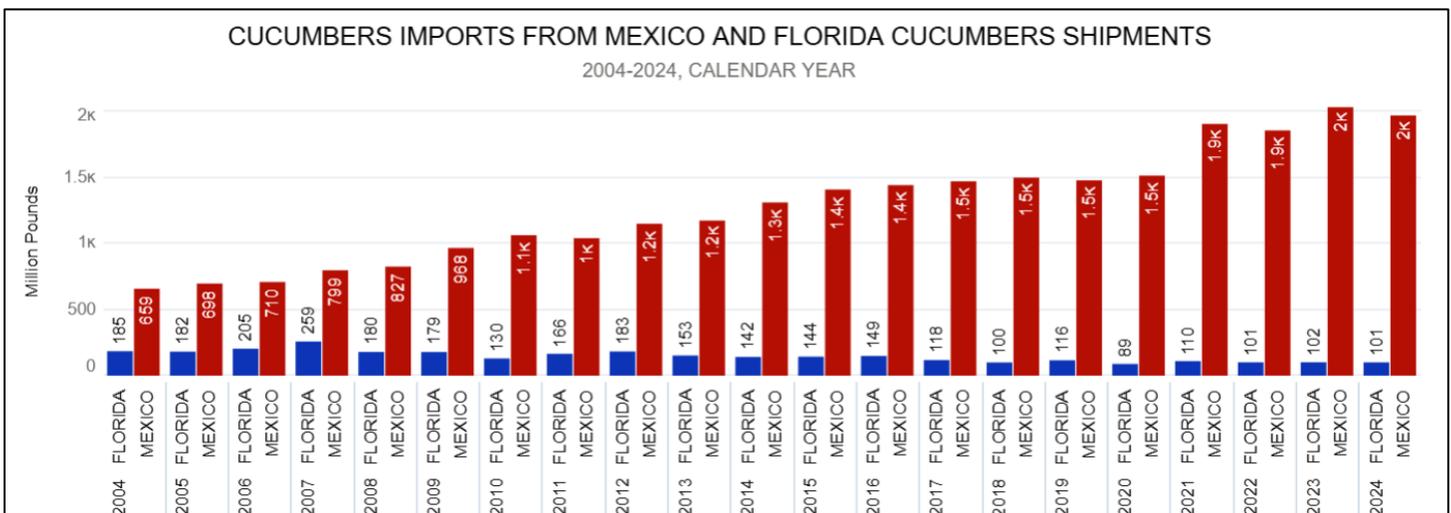
Mexican exports remained relatively minor from 2003-2008, when an accelerated expansion of products began flowing into the U.S. markets in 2009. Growth in Florida Cucumber production shows signs of injury by 2009, which continues as Mexican product continues to increase. Continued saturation from Mexico appears to have damaged Florida's market. Comparing the relative supply positions of Florida and Mexico: Florida has consistently lost market share, from 14.4% in 2004 to 3.5% in 2024 (-76.0%). Mexico has steadily gained market share, from 51.0% in 2004 to 67.6% in 2024 (+32.4%). Total demand for the product expanded as well.

+199.3% Expansion of Mexican products from 2004 to 2024.

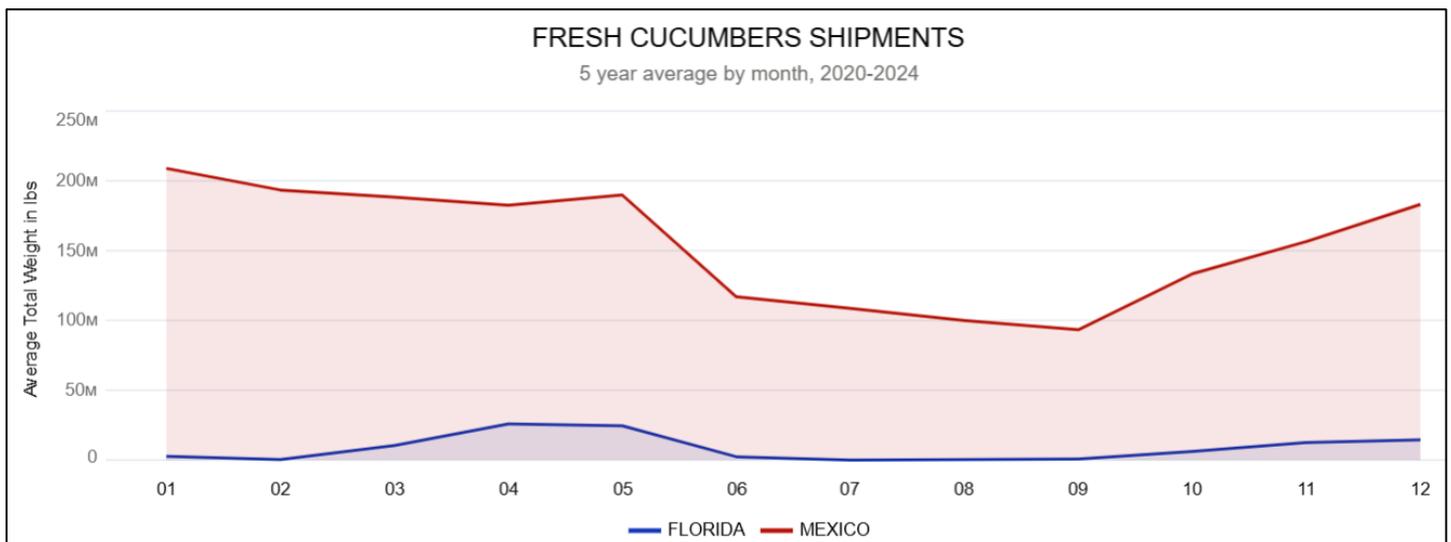
1,859 Mn pounds Mexico's average number of pounds exported from 2020-2024.

-45.7% Decline of Florida products from 2004 to 2024.

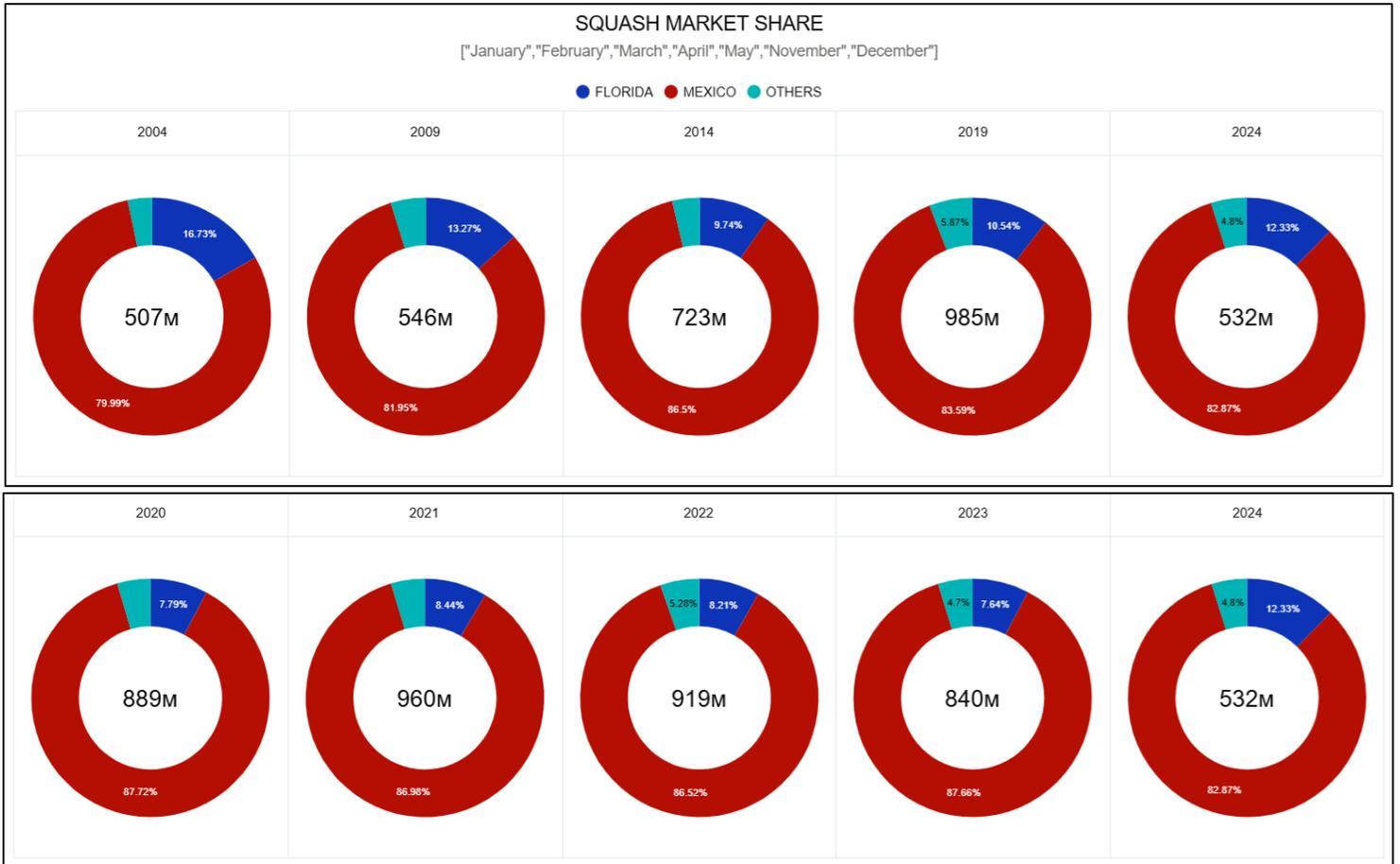
101 Mn pounds Florida's average number of pounds produced from 2020-2024.



The greatest export of Mexican Cucumbers to the U.S. market occurs during the Florida Cucumbers seasonal production from October to June.



SQUASH Analytics/Market Share Shifts



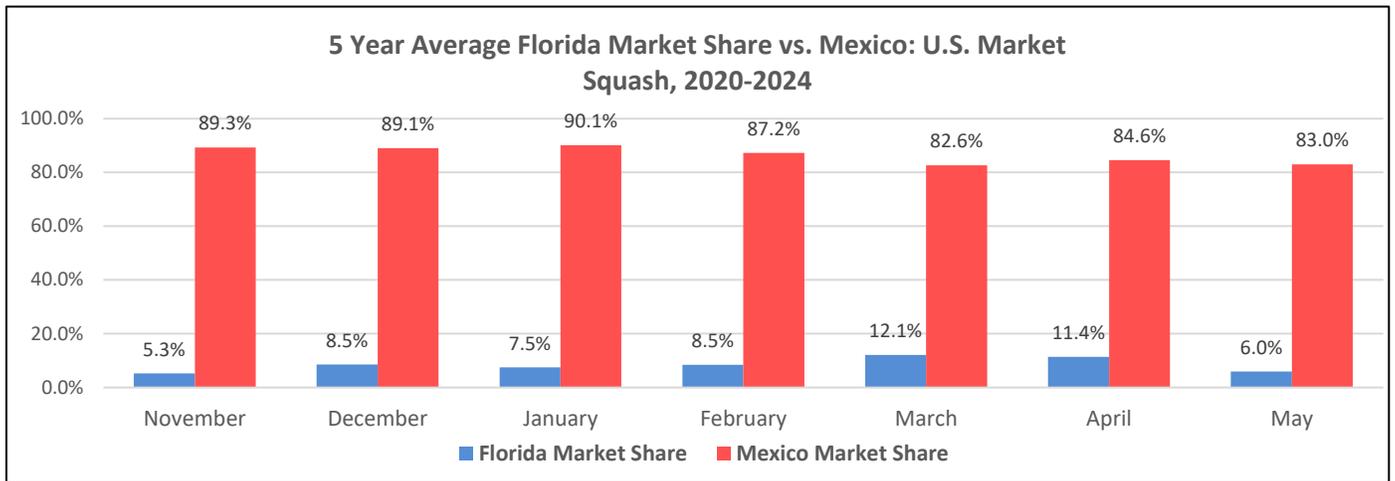
-19.0% Loss of Florida Market Share between 2004 and 2024.

+7.1% Mexico's increase in Market Share in the U.S. between 2004 and 2024.

-4.1% Change in total U.S. supply between 2004 and 2024 is down 26.3 million pounds.

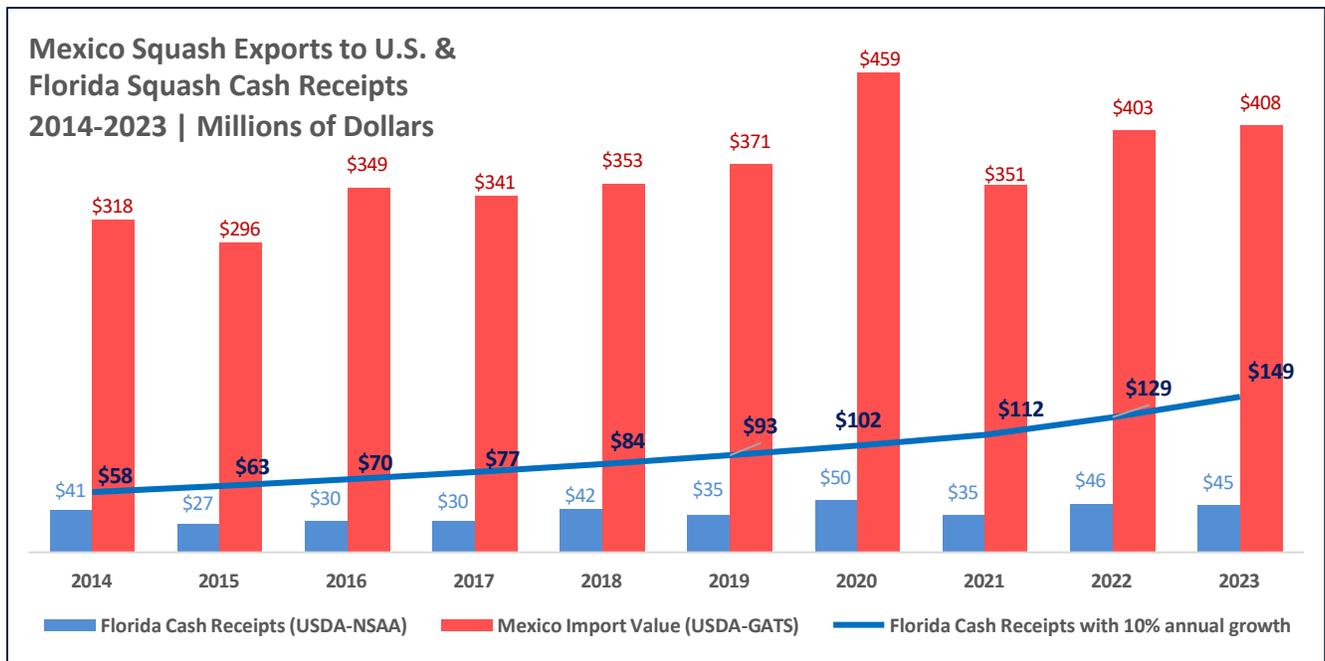
Examining the fresh squash market competitive environment provides insight into how price and supply are used aggressively/leveraged in the marketplace by Mexico. From March through April, Florida and Mexico provide 95.4% of the U.S. supply of squash, about 38.0 million bushels (42 lbs/bushel) between the two regions.

The greatest impact to Florida Squash is from November to May, as indicated in the 5-year average below.



The economic injury to Florida Squash is compounded by the loss of growth in sales in addition to the losses estimated that occurred due to lower pricing.

- The value of Mexican Squash imports to the U.S. grew 2.8% annually on average between 2014 and 2023.
- Florida Squash cash receipts average annual growth between 2014 and 2023 was 1.0%.



28.4% Expansion of the value of Mexican products from 2014 to 2023.

\$399 Mn Mexico’s average value exported from 2019-2023.

10.5% Expansion of the value of Florida products from 2014 to 2023.

\$42.3 Mn Florida’s average production value from 2019-2023.

\$149 Mn 2023 cash receipts of Florida Squash, if a conservative **10% growth rate** is applied to Florida.

Historical Supply of Florida Production and Mexican Squash Exports to the U.S.

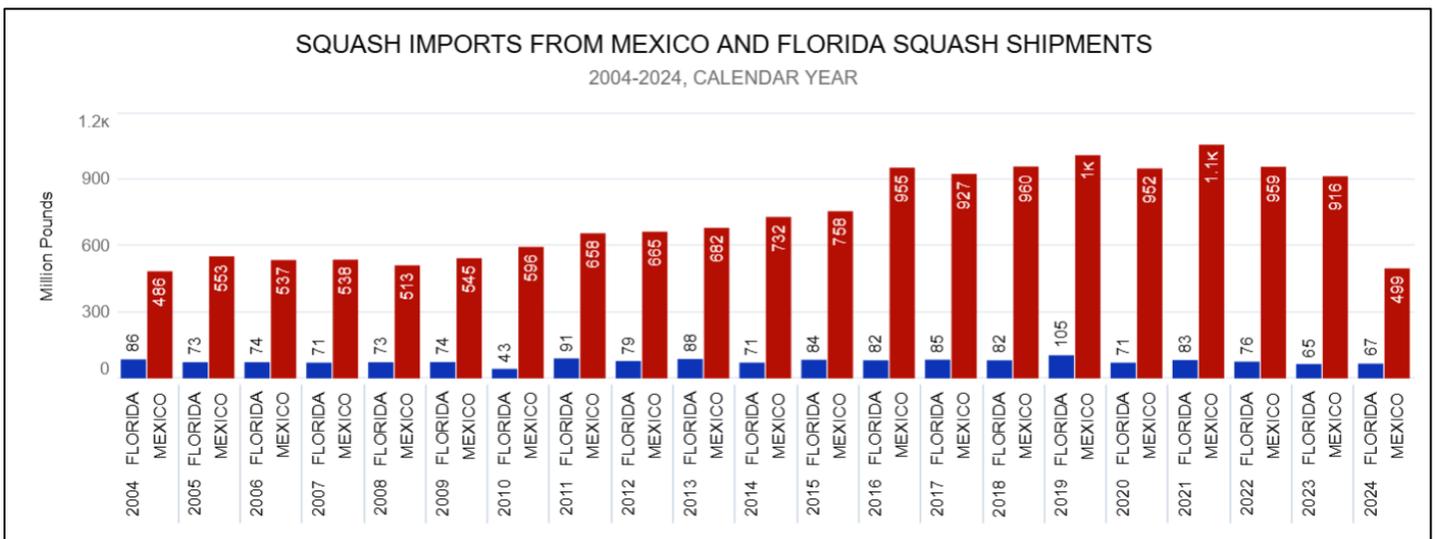
Mexican exports remained relatively minor from 2003-2009, when an accelerated expansion of products began flowing into the U.S. markets in 2010. Growth in Florida Squash production shows signs of injury by 2010, which continues as Mexican product continues to increase. Continued saturation from Mexico appears to have damaged Florida's market. Comparing the relative supply positions of Florida and Mexico: Florida has consistently lost market share, from 13.4% in 2004 to 10.8% in 2024 (-19.0%). Mexico has steadily gained market share, 75.3% in 2004 to 80.6% in 2024 (+7.1%). Total demand for the product decreased over the same time frame.

+2.7% Expansion of Mexican products from 2004 to 2024.

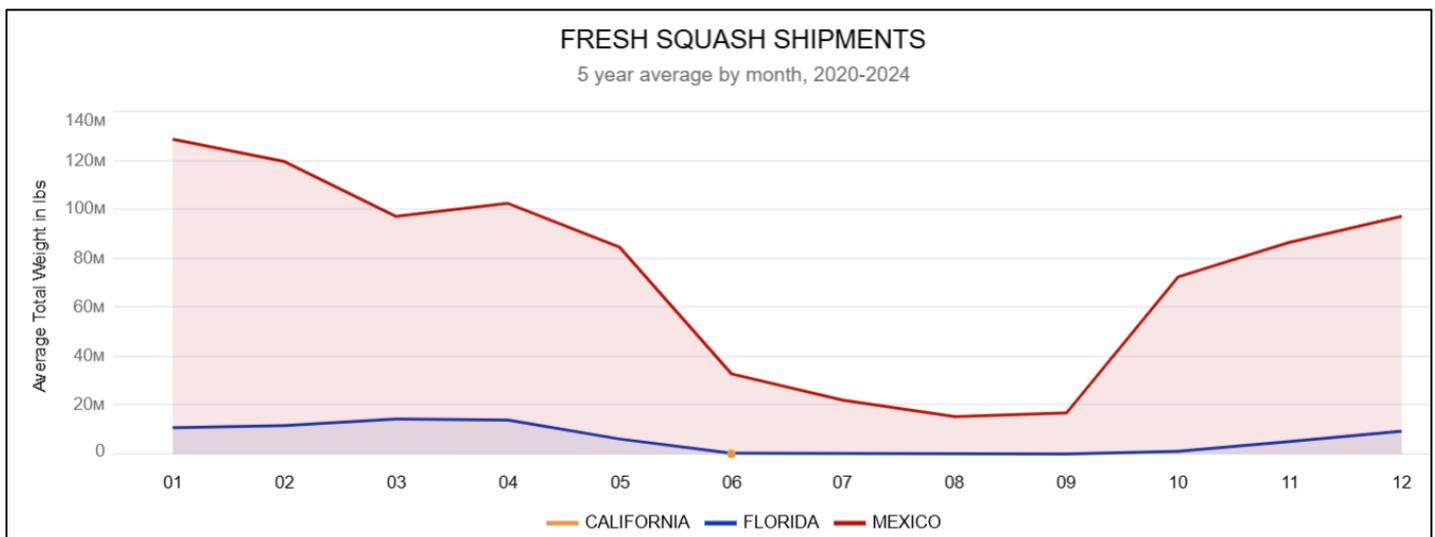
877 Mn pounds Mexico's average number of pounds exported from 2020-2024.

-22.3% Decline of Florida products from 2004 to 2024.

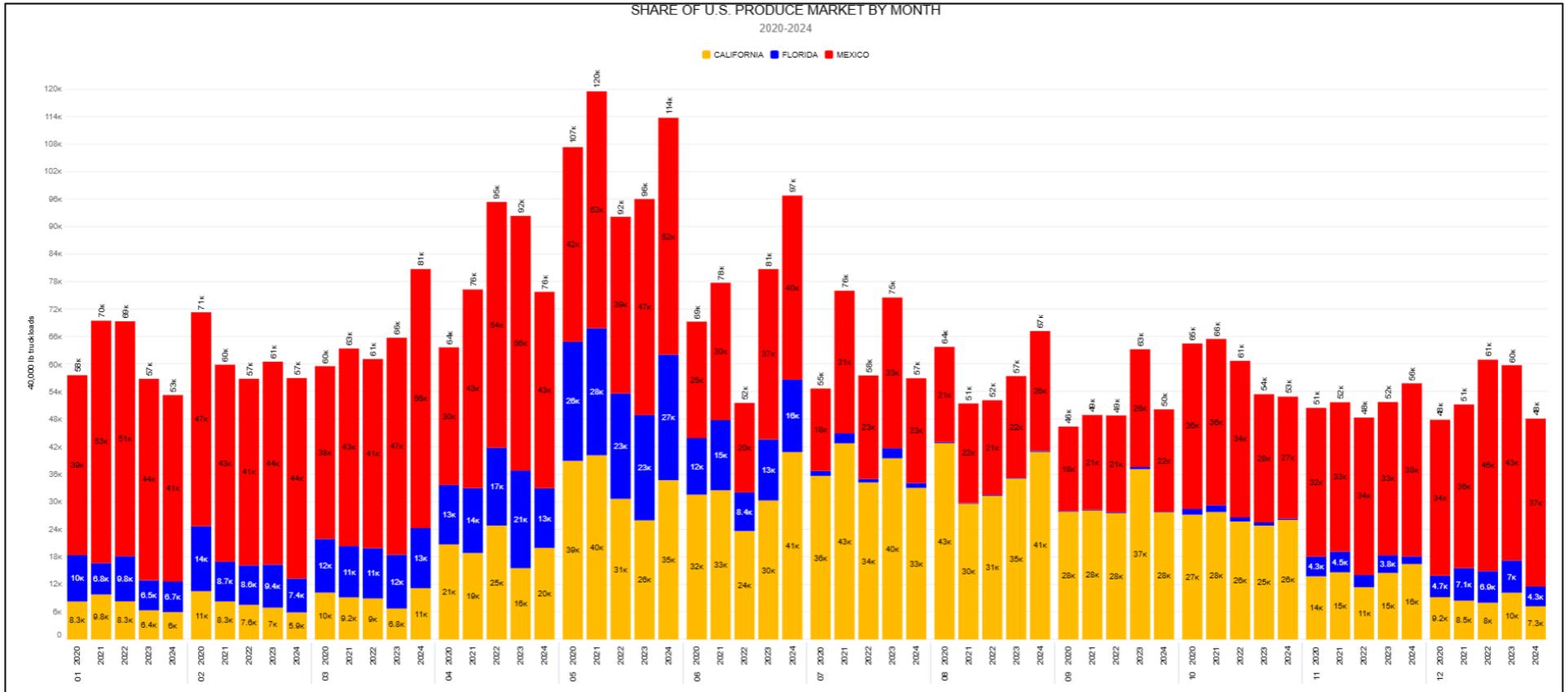
73 Mn pounds Florida's average number of pounds produced from 2020-2024.



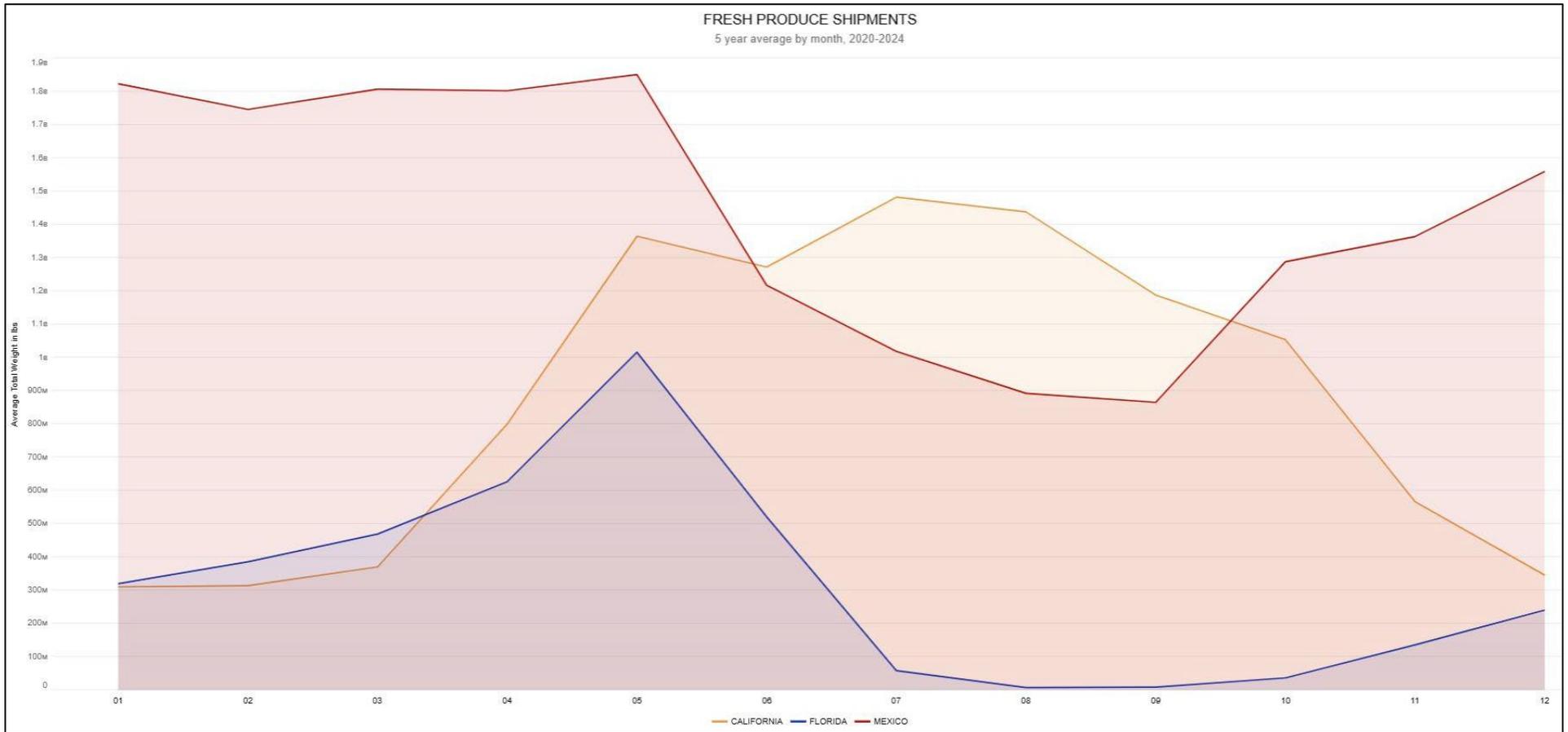
The greatest export of Mexican Squash to the U.S. market occurs during the Florida Squash seasonal production from November to May.



Supplement 1: Market Share Trends for all Market News Commodities (2020-2024):



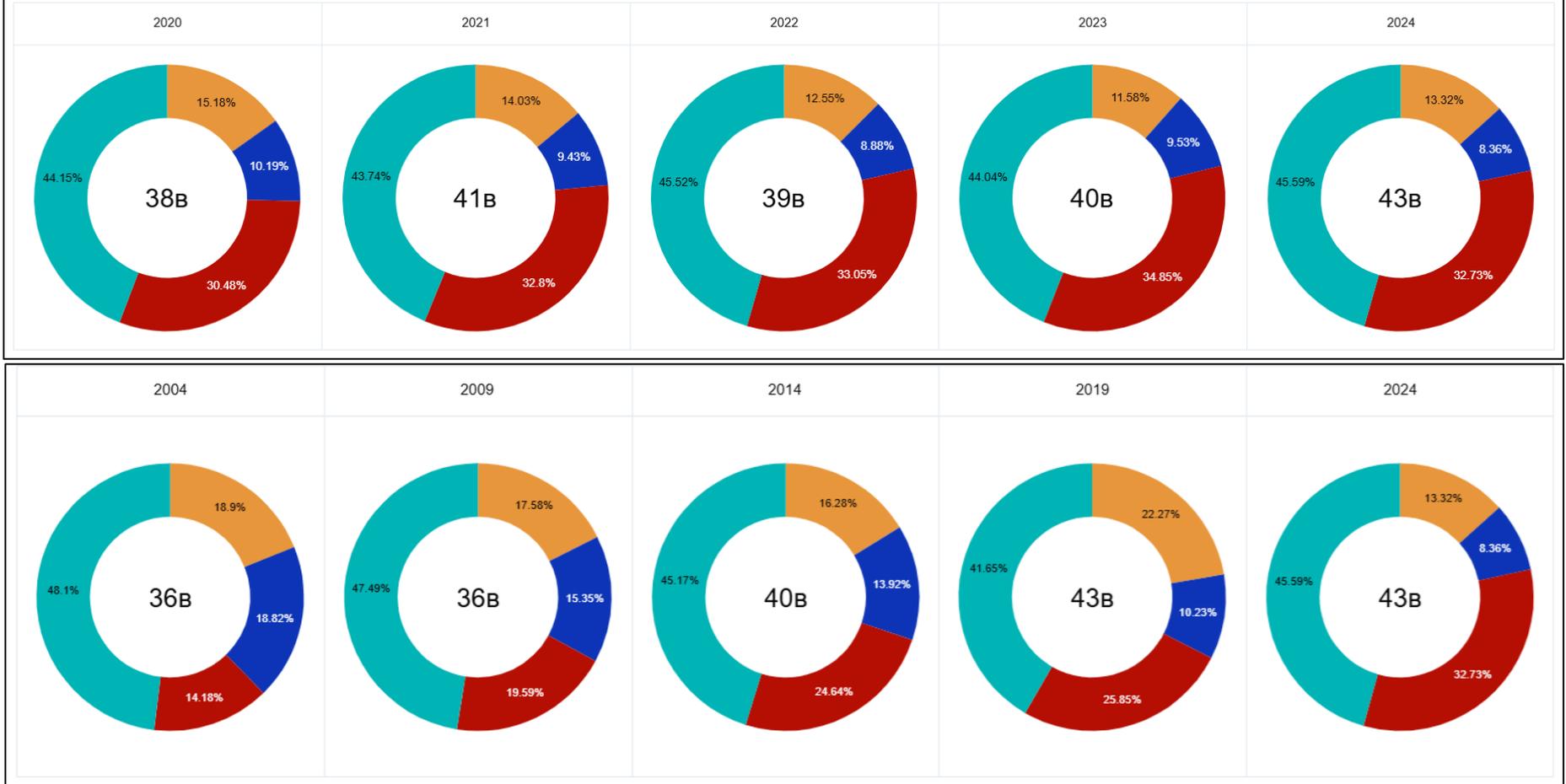
Imports of specialty crops from Mexico (Chart Below-Red Line) occur heavily during Florida's season (Blue Line).



FRESH PRODUCE MARKET SHARE

["January", "February", "March", "April", "May", "June", "November", "December"]

● CALIFORNIA ● FLORIDA ● MEXICO ● OTHERS



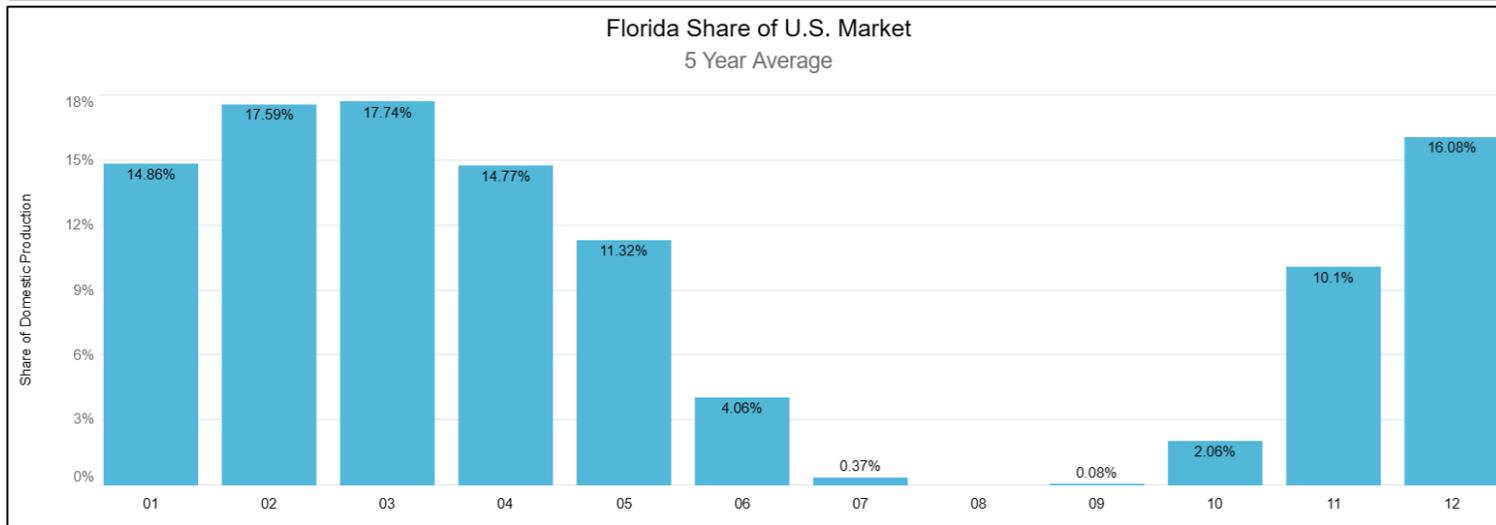
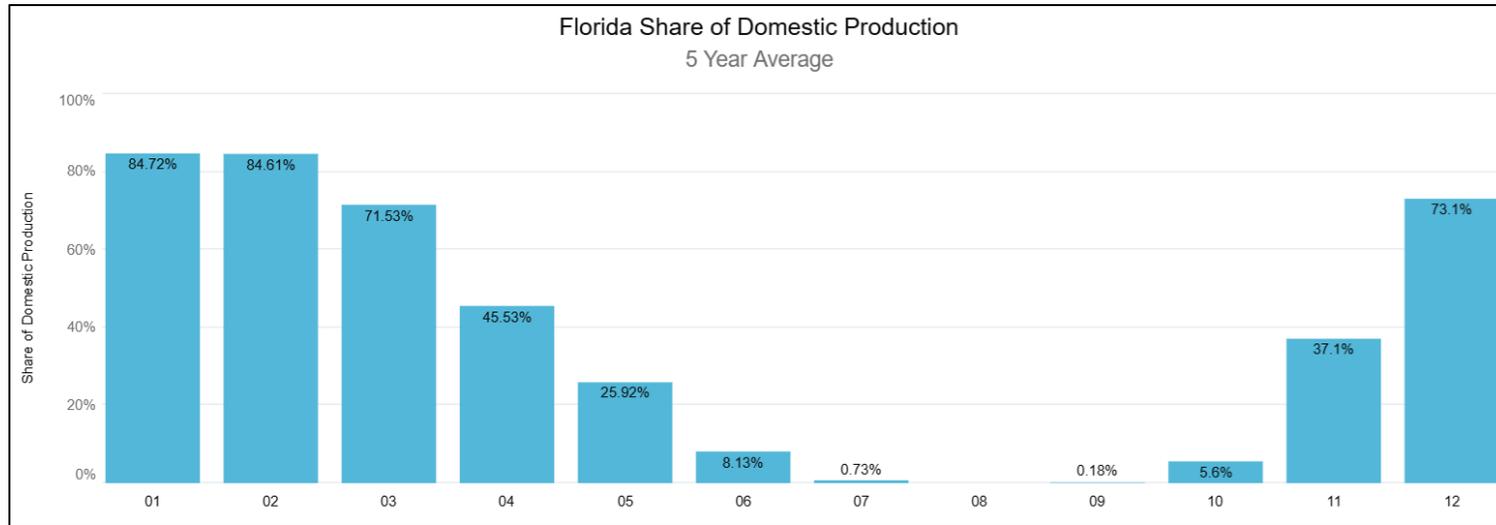
Florida's (2004) market share of 13.39% of 36 billion pounds of the total U.S. market equates to 4.77 billion pounds; by 2024 Florida's 5.81% market share of 43 billion pounds equates to 2.50 billion pounds, a **decline** of 47.97% or 2.27 billion pounds of assorted commodity. Total domestic supply/consumption expanded by 19.4% (2004-2024).

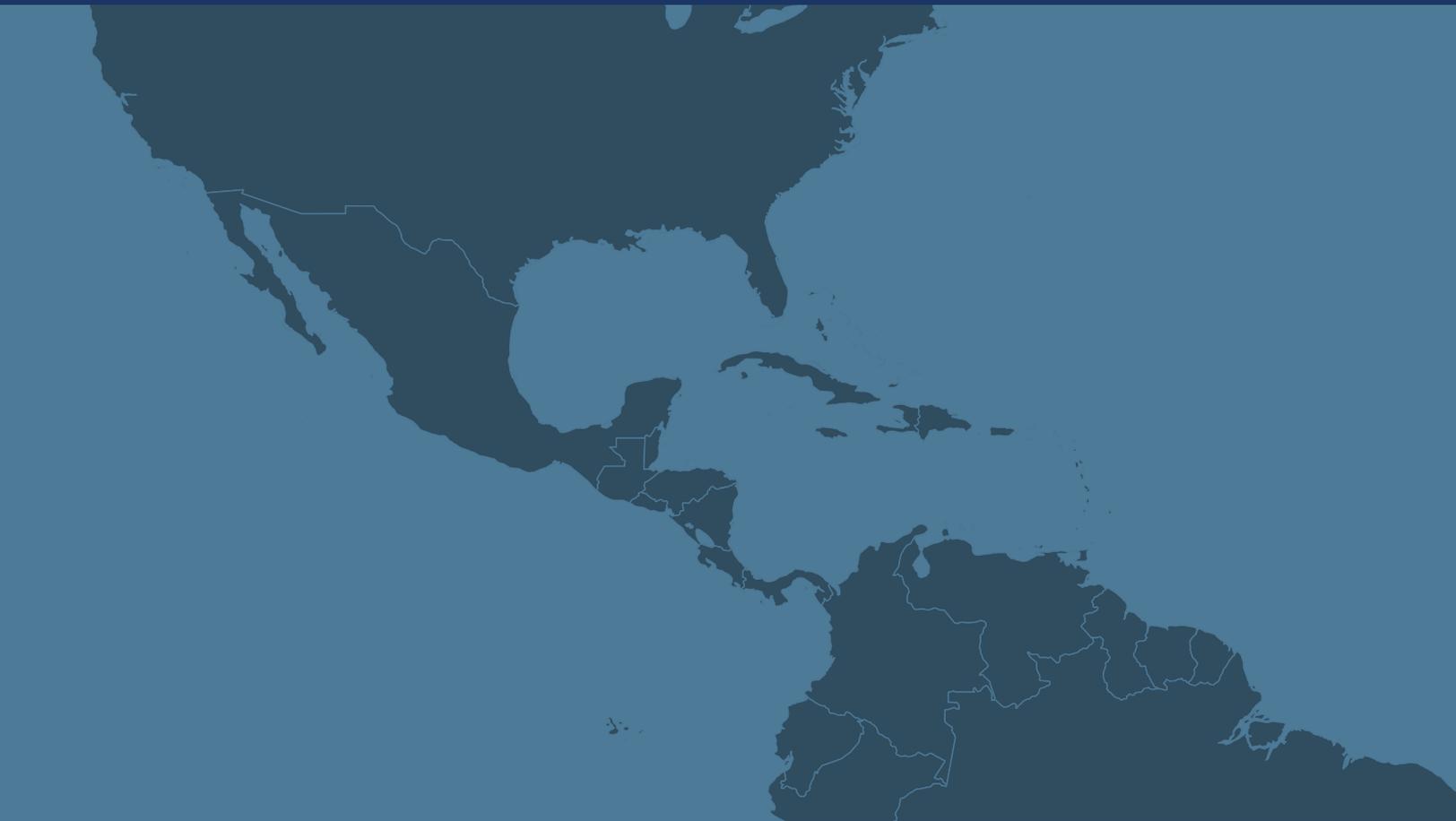
Mexican **gain** of 201.22% from 2004 to 2024.

Supplement 2: Historical Snapshot Domestic Market Share:

The following charts utilize USDA Market News and the Salesforce Analytics platform commodity movement data to show Florida's market share (proportion of recorded shipments that originate within the U.S.) for selected commodities.

Florida Average Share of Domestic Production (Jan-Dec): 36.43% (2020-2024)





**Florida Department of Agriculture
and Consumer Services**

400 S Monroe St., Tallahassee, FL 32399

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