

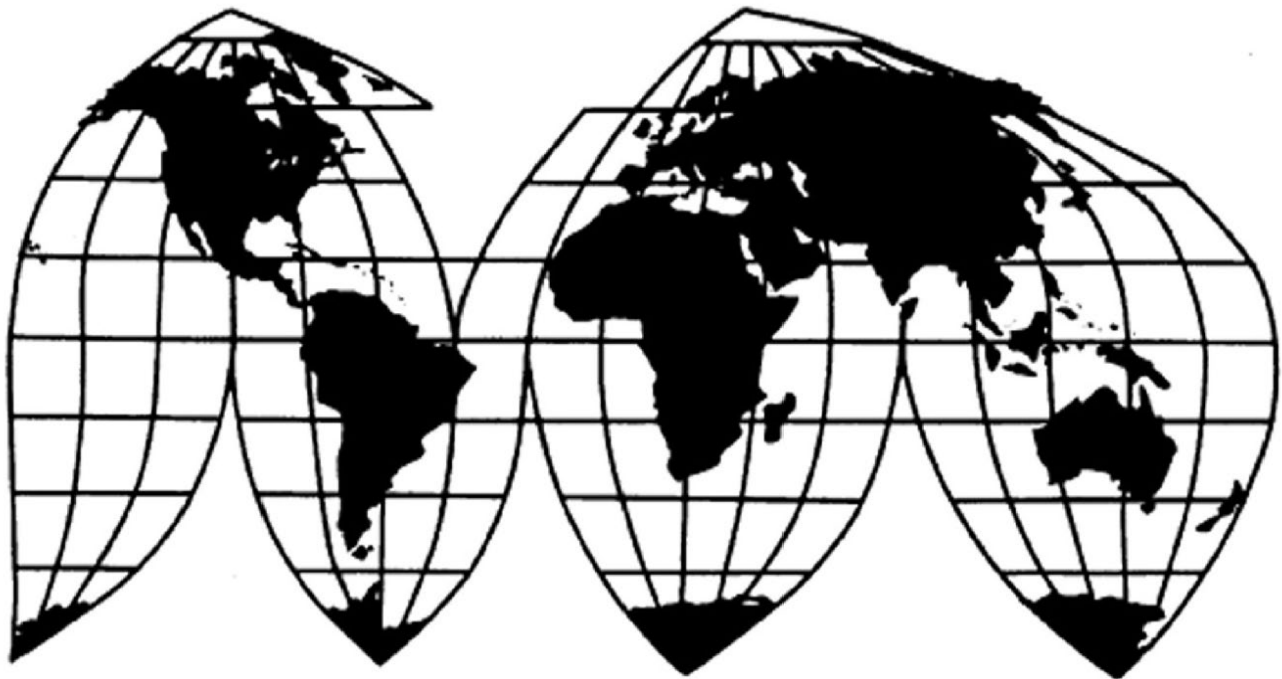
# **Fresh Winter Strawberries from Mexico**

Investigation No. 731-TA-1770 (Preliminary)

**Publication 5713**

**March 2026**

**U.S. International Trade Commission**



Washington, DC 20436

# U.S. International Trade Commission

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# U.S. International Trade Commission

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Note.—Information that would reveal confidential operations of individual firms may not be published. Such information is identified by brackets ([ ]) in confidential reports and is deleted and replaced with asterisks (\*\*\*) in public reports. Zeroes, null values, and undefined calculations are suppressed and shown as em dashes (—) in tables. If using a screen reader, we recommend increasing the verbosity setting.



# UNITED STATES INTERNATIONAL TRADE COMMISSION

Investigation No. 731-TA-1770 (Preliminary)

Fresh Winter Strawberries from Mexico

## DETERMINATION

On the basis of the record<sup>1</sup> developed in the subject investigation, the United States International Trade Commission (“Commission”) determines, pursuant to the Tariff Act of 1930 (“the Act”), that there is a reasonable indication that an industry in the United States is materially injured by reason of imports of fresh winter strawberries from Mexico, provided for in subheading 0810.10.40 of the Harmonized Tariff Schedule of the United States, that are alleged to be sold in the United States at less than fair value (“LTFV”).<sup>2</sup>

## COMMENCEMENT OF FINAL PHASE INVESTIGATION

Pursuant to section 207.18 of the Commission’s rules, the Commission also gives notice of the commencement of the final phase of its investigation. The Commission will issue a final phase notice of scheduling, which will be published in the *Federal Register* as provided in section 207.21 of the Commission’s rules, upon notice from the U.S. Department of Commerce (“Commerce”) of an affirmative preliminary determination in the investigation under § 733(b) of the Act, or, if the preliminary determination is negative, upon notice of an affirmative final determination in that investigation under § 735(a) of the Act. Parties that filed entries of appearance in the preliminary phase of the investigation need not enter a separate appearance for the final phase of the investigation. Any other party may file an entry of appearance for the final phase of the investigation after publication of the final phase notice of scheduling. Industrial users, and, if the merchandise under investigation is sold at the retail level, representative consumer organizations have the right to appear as parties in a Commission antidumping investigation. The Secretary will prepare a public service list containing the names and addresses of all persons, or their representatives, who are parties to the investigation. As provided in section 207.20 of the Commission’s rules, the Director of the Office of Investigations will circulate draft questionnaires for the final phase of the investigation to

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<sup>1</sup> The record is defined in § 207.2(f) of the Commission’s Rules of Practice and Procedure (19 CFR 207.2(f)).

<sup>2</sup> 91 FR 6822 (February 13, 2026).

parties to the investigation, placing copies on the Commission’s Electronic Document Information System (EDIS, <https://edis.usitc.gov>) for comment.

## **BACKGROUND**

On December 31, 2025, Strawberry Growers for Fair Trade (“SGFT”)<sup>3</sup> filed a petition with the Commission and Commerce, alleging that an industry in the United States is materially injured or threatened with material injury by reason of LTFV imports of fresh winter strawberries from Mexico. Accordingly, effective December 31, 2025, the Commission instituted antidumping duty investigation No. 731-TA-1770 (Preliminary).

Notice of the institution of the Commission’s investigation and of a public conference to be held in connection therewith was given by posting copies of the notice in the Office of the Secretary, U.S. International Trade Commission, Washington, DC, and by publishing the notice in the *Federal Register* on January 6, 2026 (91 FR 380). The Commission conducted its conference on January 21, 2026. All persons who requested the opportunity were permitted to participate.

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<sup>3</sup> SGFT is an ad hoc trade association consisting of Astin Strawberry Exchange (Plant City, Florida); BBI Produce, Inc. dba Berry Boss (Dover, Florida); Florida Department of Agriculture and Consumer Services (Tallahassee, Florida); Grimes Produce Company (Plant City, Florida); Mathis Farms (Plant City, Florida); Simmons Farms, Inc. (Plant City, Florida); Sizemore Farms, Inc. (Plant City, Florida); Sweet Life Farms (Plant City, Florida); Ultra Farms (Wimauma, Florida); and the Florida Strawberry Growers Association (Dover, Florida).

## Views of the Commission

Based on the record in the preliminary phase of these investigations, we determine that there is a reasonable indication that an industry in the United States is materially injured by reason of imports of fresh winter strawberries from Mexico that are allegedly sold in the United States at less than fair value (“LTFV”).

### I. The Legal Standard for Preliminary Determinations

The legal standard for preliminary antidumping and countervailing duty determinations requires the Commission to determine, based upon the information available at the time of the preliminary determinations, whether there is a reasonable indication that a domestic industry is materially injured or threatened with material injury, or that the establishment of an industry is materially retarded, by reason of the allegedly unfairly traded imports.<sup>1</sup> In applying this standard, the Commission weighs the evidence before it and determines whether “(1) the record as a whole contains clear and convincing evidence that there is no material injury or threat of such injury; and (2) no likelihood exists that contrary evidence will arise in a final investigation.”<sup>2</sup>

### II. Background

The Strawberry Growers for Fair Trade (“Petitioner”), an *ad hoc* trade association consisting primarily of domestic producers of fresh winter strawberries, filed the petition in this

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<sup>1</sup> 19 U.S.C. §§ 1671b(a), 1673b(a) (2000); see also *American Lamb Co. v. United States*, 785 F.2d 994, 1001–04 (Fed. Cir. 1986); *Aristech Chem. Corp. v. United States*, 20 CIT 353, 354–55 (1996). No party argues that the establishment of an industry in the United States is materially retarded by the allegedly unfairly traded imports.

<sup>2</sup> *American Lamb Co.*, 785 F.2d at 1001; see also *Tex. Crushed Stone Co. v. United States*, 35 F.3d 1535, 1543 (Fed. Cir. 1994).

investigation on December 31, 2025.<sup>3</sup> Petitioner participated in the preliminary conference with counsel and submitted a postconference brief.<sup>4</sup>

Several respondent entities participated in this investigation. Driscoll's, Inc. ("Driscoll's"), a domestic producer of strawberries, and Driscoll's Operaciones, S.A. de C.V. ("Driscoll's (Mexico)"), a producer and exporter of strawberries from Mexico (collectively, the "Driscoll's Respondents"), appeared at the preliminary conference with counsel and jointly submitted a postconference brief.<sup>5</sup> Gem-Pack Berries, LLC, a U.S. importer of strawberries, and the Anthony Marano Company, GoodFarms, Inc., S. Katzman Produce, Inc., and Wegmans Food Markets, Inc., U.S. distributors and resellers of both domestic strawberries and strawberries imported from Mexico, appeared at the conference with the Driscoll's Respondents.<sup>6</sup> Aneberries A.C. ("Aneberries"), an association of berry producers in Mexico, and Mainland Farms S.A. de C.V. ("Mainland Farms"), an exporter of strawberries from Mexico (collectively, the "Aneberries Respondents"), appeared at the conference with counsel and jointly submitted a postconference brief.<sup>7</sup> San Vicente Camalu S. de P.R. de R.L. ("San Vicente"), a producer and

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<sup>3</sup> See Petition for the Imposition of Antidumping Duties, EDIS Doc. 867600 (Dec. 31, 2025) ("Petition"); Confidential Report, Memorandum INV-YY-020 (Feb. 20, 2026), *as modified by* Revision Memorandum INV-YY-030 (Feb. 26, 2026) ("CR") at 1.1; Public Report, *Fresh Winter Strawberries from Mexico*, Inv. No. 731-TA-1770 (Preliminary), USITC Pub. 5713 (Mar. 2026) ("PR") at 1.1. The association's members include domestic producers Astin Strawberry Exchange, BBI Produce, Inc. dba Berry Boss, Grimes Produce Company, Mathis Farms, Simmons Farms, Inc., Sizemore Farms, Inc., Sweet Life Farms, and Ultra Farms. Petition, vol. I, Exhibit I-1; CR/PR at 1.1 n.1. The association also includes the Florida Department of Agriculture and Consumer Services and the Florida Strawberry Growers Association. *Id.*

<sup>4</sup> See Transcript of Preliminary Conference, EDIS Doc. 869720 (Jan. 21, 2026) ("Conf. Tr."); Postconference Brief of the Strawberry Growers for Fair Trade, EDIS Doc. 870844 (Jan. 30, 2026) ("Petitioner's Postconf. Br.").

<sup>5</sup> Postconference Brief of Driscoll's, Inc. and Driscoll's Operaciones, S.A. de C.V., EDIS Doc. 870874 (Jan. 30, 2026) ("Driscoll's Respondents' Postconf. Br."). The Driscoll's Respondents engage independent farms in the United States and Mexico, who act as toll producers to grow strawberries that the Driscoll's Respondents then distribute.

<sup>6</sup> See generally Conf. Tr. at 154–57 (Farley); *id.* at 157–60 (Wiemer); *id.* at 160–63 (Hilton); *id.* at 163–65 (Katzman); *id.* at 166–68 (Marano). Although Gem-Pack Berries, LLC appeared to indicate at the preliminary conference that it is a grower of strawberries in both the United States and Mexico, the firm responded only to the Commission's U.S. importer questionnaire.

<sup>7</sup> Postconference Brief of Aneberries A.C. and Mainland Farms S.A. de C.V., EDIS Doc. 870891 (Jan. 30, 2026) ("Aneberries Respondents' Postconf. Br.").

exporter of strawberries from Mexico, appeared at the conference with counsel and submitted a postconference brief.<sup>8 9</sup>

U.S. industry data are based on the questionnaire responses of 39 domestic producers of fresh strawberries, which accounted for 47.5 percent of U.S. production of fresh strawberries (winter and non-winter) during 2024.<sup>10</sup> U.S. import data are based on adjusted official import statistics for imports entered October 1 through March 31.<sup>11</sup>

The Commission also received questionnaire responses from 49 Mexican producers or exporters of subject merchandise, who accounted for \*\*\* percent of production of fresh winter strawberries in Mexico in 2024 and whose exports accounted for \*\*\* percent of subject imports from Mexico reported in questionnaire responses for 2024.<sup>12</sup>

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<sup>8</sup> Postconference Brief of Vicente Camalu, S. de P.R. de R.L., EDIS Doc. 870887 (Jan. 30, 2026) (“San Vicente’s Postconf. Br.”).

<sup>9</sup> Additionally, the Government of Mexico appeared at the conference and submitted a postconference brief. Postconference Brief of the Government of Mexico, EDIS Doc. 866719 (Dec. 16, 2025). The California Strawberry Commission, a California state agency, also appeared at the conference. *See generally* Conf. Tr. at 10–26 (Tomlinson).

<sup>10</sup> CR/PR at 1.5, 3.1. Staff calculated the U.S. production coverage by dividing the production totals reported in questionnaire responses by production data reported by the U.S. Department of Agriculture’s National Agriculture Statistics Service. *Id.* at 3.1 n.1.

<sup>11</sup> CR/PR at 1.5, 4.1. The Commission received responses to its questionnaires from 15 U.S. importers, which accounted for \*\*\* percent of U.S. imports of fresh winter strawberries from Mexico and \*\*\* percent of U.S. imports of fresh winter strawberries from nonsubject sources in 2024. *Id.* at 4.1. Staff calculated the subject import coverage by dividing the subject import totals reported in questionnaire responses by official import statistics from Commerce for Harmonized Tariff Schedule (“HTS”) subheading 0810.10.40, adjusted to include only fresh strawberries entered between October 1 and March 31. *Id.* For within-region imports, the import statistics were further adjusted to report only within-region imports by source using data reported by respondents to the Commission’s U.S. importer questionnaire. *See, e.g., id.* at Table 4.2 note.

According to the amended scope, strawberries entered in October are nonsubject merchandise, as discussed further below. Because the Commission’s questionnaires defined fresh winter strawberries as those entered or harvested from October 1 to March 31 pursuant to the petition’s original scope, the staff report includes October in the official import statistics to keep that dataset consistent with the questionnaire dataset. In addition, it is likely that the import data do not cover some subject fresh strawberries harvested at the very end of March, which would make them in-scope, but entered after March 31 and therefore not captured by the official import statistics. However, for purposes of the preliminary phase of the investigation, the official U.S. import statistics represent the best information available for imports of subject merchandise from Mexico.

<sup>12</sup> CR/PR at Table 7.1. The responding foreign producers’ approximate share of production reflects their reported production of fresh winter strawberries in Mexico during 2024 divided by the production in Mexico reported by Servicio de Información Agroalimentaria y Pesquera. *Id.* at Table 7.1 note. Staff calculated the responding foreign producers’ exports as a share of total U.S. imports of fresh winter strawberries from Mexico by dividing the export totals reported in foreign producer questionnaire responses by the import totals reported in importer questionnaire responses. *Id.*

### III. Domestic Like Product

In determining whether there is a reasonable indication that an industry in the United States is materially injured or threatened with material injury by reason of imports of the subject merchandise, the Commission first defines the “domestic like product” and the “industry.”<sup>13</sup> Section 771(4)(A) of the Tariff Act of 1930, as amended (“the Tariff Act”), defines the relevant domestic industry as the “producers as a whole of a domestic like product, or those producers whose collective output of a domestic like product constitutes a major proportion of the total domestic production of the product.”<sup>14</sup> In turn, the Tariff Act defines “domestic like product” as “a product which is like, or in the absence of like, most similar in characteristics and uses with, the article subject to an investigation.”<sup>15</sup>

By statute, the Commission’s “domestic like product” analysis begins with the “article subject to an investigation,” *i.e.*, the subject merchandise as determined by the U.S. Department of Commerce (“Commerce”).<sup>16</sup> Therefore, Commerce’s determination as to the scope of the imported merchandise that is subsidized and/or sold at less than fair value is “necessarily the starting point of the Commission’s like product analysis.”<sup>17</sup> The Commission then defines the domestic like product in light of the imported articles Commerce has identified.<sup>18</sup> The decision regarding the appropriate domestic like product(s) in an investigation is a factual determination, and the Commission has applied the statutory standard of “like” or “most similar in characteristics and uses” on a case-by-case basis.<sup>19</sup> No single factor is

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<sup>13</sup> 19 U.S.C. § 1677(4)(A).

<sup>14</sup> 19 U.S.C. § 1677(4)(A).

<sup>15</sup> 19 U.S.C. § 1677(10).

<sup>16</sup> 19 U.S.C. § 1677(10). The Commission must accept Commerce’s determination as to the scope of the imported merchandise that is subsidized and/or sold at less than fair value. *See, e.g., USEC, Inc. v. United States*, 34 F. App’x 725, 730 (Fed. Cir. 2002) (“The ITC may not modify the class or kind of imported merchandise examined by Commerce.”); *Algoma Steel Corp. v. United States*, 688 F. Supp. 639, 644 (Ct. Int’l Trade 1988), *aff’d*, 865 F.3d 240 (Fed. Cir.), *cert. denied*, 492 U.S. 919 (1989).

<sup>17</sup> *Cleo Inc. v. United States*, 501 F.3d 1291, 1298 (Fed. Cir. 2007); *see also Hitachi Metals, Ltd. v. United States*, 949 F.3d 710, 717 (Fed. Cir. 2020) (the statute requires the Commission to start with Commerce’s subject merchandise in reaching its own like product determination).

<sup>18</sup> *Cleo*, 501 F.3d at 1298 n.1 (“Commerce’s {scope} finding does not control the Commission’s {like product} determination.”); *Hosiden Corp. v. Advanced Display Mfrs.*, 85 F.3d 1561, 1568 (Fed. Cir. 1996) (the Commission may find a single like product corresponding to several different classes or kinds defined by Commerce); *Torrington Co. v. United States*, 747 F. Supp. 744, 748–52 (Ct. Int’l Trade 1990), *aff’d*, 938 F.2d 1278 (Fed. Cir. 1991) (affirming the Commission’s determination defining six like products in investigations where Commerce found five classes or kinds).

<sup>19</sup> *See, e.g., Cleo*, 501 F.3d at 1299; *NEC Corp. v. Dep’t of Commerce*, 36 F. Supp. 2d 380, 383 (Ct. Int’l Trade 1998); *Nippon Steel Corp. v. United States*, 19 CIT 450, 455 (1995); *Torrington Co. v. United States* (Continued...)

dispositive, and the Commission may consider other factors it deems relevant based on the facts of a particular investigation.<sup>20</sup> The Commission looks for clear dividing lines among possible like products and disregards minor variations.<sup>21</sup> The Commission may, where appropriate, include domestic articles in the domestic like product in addition to those described in the scope.<sup>22</sup>

#### **A. Scope Definition**

In its notice of initiation, Commerce defined the imported merchandise within the scope of the investigations as follows:

The merchandise covered by this investigation is all fresh and chilled winter strawberries (winter strawberries) from Mexico harvested or entered during the period November 1 through March 31.

Winter strawberries may be stemmed or de-stemmed, whole or sliced, imported in bulk or loose form, or may be imported in individual containers packaged for retail sale. The scope of this investigation includes all winter strawberries, whether or not organic, regardless of production method, and irrespective of color, grade, shape, size, or packaging. Subject merchandise may be cleaned, coated (including chocolate covered or other coated confectionary items), washed, waxed, inspected, subjected to metal detection, and/or vacuum cooled prior to

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*States*, 747 F. Supp. 744, 749 n.3 (Ct. Int'l Trade 1990), *aff'd*, 938 F.2d 1278 (Fed. Cir. 1991) ("every like product determination 'must be made on the particular record at issue' and the 'unique facts of each case'"). The Commission generally considers a number of factors including the following: (1) physical characteristics and uses; (2) interchangeability; (3) channels of distribution; (4) customer and producer perceptions of the products; (5) common manufacturing facilities, production processes, and production employees; and, where appropriate, (6) price. See *Nippon*, 19 CIT at 455 n.4; *Timken Co. v. United States*, 913 F. Supp. 580, 584 (Ct. Int'l Trade 1996).

<sup>20</sup> See, e.g., S. Rep. No. 96-249 at 90–91 (1979).

<sup>21</sup> See, e.g., *Nippon*, 19 CIT at 455; *Torrington*, 747 F. Supp. at 748–49; see also S. Rep. No. 96-249 at 90–91 (Congress has indicated that the like product standard should not be interpreted in "such a narrow fashion as to permit minor differences in physical characteristics or uses to lead to the conclusion that the product and article are not 'like' each other, nor should the definition of 'like product' be interpreted in such a fashion as to prevent consideration of an industry adversely affected by the imports under consideration.").

<sup>22</sup> See, e.g., *Pure Magnesium from China and Israel*, Inv. Nos. 701-TA-403 & 731-TA-895–896 (Final), USITC Pub. 3467 (Nov. 2001) at 8 n.34; *Torrington*, 747 F. Supp. at 748–49 (holding that the Commission is not legally required to limit the domestic like product to the product advocated by the petitioner, co-extensive with the scope).

importation, including winter strawberries that undergo further processing in a third country.

Winter strawberries covered by this investigation are classified under the following subheadings of the Harmonized Tariff Schedule of the United States (HTSUS) and may enter under: 0810.10.4020; 0810.10.4040; 0810.10.4060; 0810.10.4080; and prior to 2024, 0810.10.4010 and 0810.10.4090. Although the HTSUS numbers are provided for convenience and customs purposes, the written description of the scope of the investigation is dispositive.<sup>23</sup>

Fresh strawberries are fruit of the plant *Fragaria x ananassa*.<sup>24</sup> They are perishable, seasonally grown, and typically red in color.<sup>25</sup> End users consume fresh strawberries alone or in sweet or savory dishes.<sup>26</sup>

## **B. Arguments of the Parties**

*Petitioner's Arguments.* Petitioner argues that the Commission's traditional domestic like product factors support defining a single domestic like product consisting of fresh winter

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<sup>23</sup> *Notice of Initiation*, 91 Fed. Reg. at 6826. In the petition, the scope defined fresh winter strawberries as those "harvested or entered during the period October 1 through March 31." Petition, vol. I, at 4. On January 12, Petitioner asserted that "October 1 was a scrivener's error," and revised the scope to make November 1 the beginning of the period covered by the scope. *Response to First Supplemental Questionnaire Volume I: Common Issues and Injury Petition*, EDIS Doc. 868692, at 2, Exhibit I-1SUPP-4 (Jan. 12, 2026). The scope in Commerce's notice of initiation is substantially the same as Petitioner's revised scope.

The Commission urges any petitioner who files an antidumping/countervailing duty petition to take care that the petition accurately indicates the scope of investigation. By necessity, because of the very short time frame in which the Commission's preliminary investigations are conducted, the Commission relies on the scope set out in a petition to define the subject merchandise and domestic like product in its questionnaires in a preliminary investigation, which, given the statutory timeframe, must be sent out within two business days after the petition is filed. See 19 U.S.C. §§ 1671b(a)(2)(A), 1673b(a)(2)(A) (requiring the Commission to make its preliminary determination within 45 days after the date on which the petition is filed, unless later extended by Commerce). Any errors in the scope may result in the collection of data that do not accurately reflect the subject merchandise, the domestic like product, or both. The Commission may make negative preliminary determinations based on record evidence collected in accordance with the original scope of a petition as the information available to it, notwithstanding a subsequent amendment to the scope by petitioner. *Co-Steel Raritan, Inc. v. Int'l Trade Comm'n*, 357 F.3d 1294, 1317 (Fed. Cir. 2004).

<sup>24</sup> CR/PR at 1.9.

<sup>25</sup> CR/PR at 1.9.

<sup>26</sup> CR/PR at 1.4.

strawberries, coextensive with the scope.<sup>27</sup> It argues that there is a clear dividing line between fresh winter strawberries and fresh non-winter strawberries.<sup>28</sup> Specifically, Petitioner claims that winter and non-winter strawberries are different varieties and have \*\*\*.<sup>29</sup> Citing to a report \*\*\* and testimony at the preliminary conference, Petitioner contends that \*\*\*, winter strawberries taste both sweeter and more sour than non-winter strawberries.<sup>30</sup> It argues that winter strawberries and non-winter strawberries are not interchangeable because they are not available for purchase at the same time.<sup>31</sup> It also claims that the two types of strawberries are significantly different in terms of channels of distribution, with the former sold primarily in states east of the Mississippi River and the latter sold nationwide.<sup>32</sup> Further, according to Petitioner, winter strawberries are more often sold through the spot market, while non-winter strawberries are sold primarily through long-term agreements between producers and distributors/resellers.<sup>33</sup>

Petitioner contends that producers and customers perceive winter strawberries and non-winter strawberries differently, with producers identifying themselves specifically as winter strawberry producers and customers recognizing winter strawberries by their availability during the winter season.<sup>34</sup> Petitioner argues that the two types of strawberries differ with respect to manufacturing facilities, production processes, and production employees, with “growing practices includ[ing] significant differences in plant densities, growing bed size, planting techniques, and irrigation practices.”<sup>35</sup> Additionally, it claims that winter strawberries are sold at a premium compared to non-winter strawberries.<sup>36</sup>

Petitioner distinguishes this investigation from *Spring Table Grapes from Chile and Mexico*, where the Commission concluded that the statute did not permit the Commission to “consider seasonality as the main factor in [its] determination of [the] domestic like product.”<sup>37</sup>

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<sup>27</sup> Petitioner’s Postconf. Br., Exhibit 1 at 37–48.

<sup>28</sup> Petitioner’s Postconf. Br., Exhibit 1 at 37–48.

<sup>29</sup> Petitioner’s Postconf. Br., Exhibit 1 at 37–38.

<sup>30</sup> Petitioner’s Postconf. Br., Exhibit 1 at 39–40 (citing Exhibit 5).

<sup>31</sup> Petitioner’s Postconf. Br., Exhibit 1 at 41.

<sup>32</sup> Petitioner’s Postconf. Br., Exhibit 1 at 41–42.

<sup>33</sup> Petitioner’s Postconf. Br., Exhibit 1 at 42–43.

<sup>34</sup> Petitioner’s Postconf. Br., Exhibit 1 at 43–45.

<sup>35</sup> Petitioner’s Postconf. Br., Exhibit 1 at 45. For example, Petitioner claims that non-winter strawberries are planted at higher densities on wider raised beds than winter strawberries, that leaves are removed from non-winter plants during harvest unlike winter plants, and that soil differences between California (non-winter) and Florida (winter) result in different irrigation practices. *Id.* at 45–46.

<sup>36</sup> Petitioner’s Postconf. Br., Exhibit 1 at 46–47.

<sup>37</sup> See *Spring Table Grapes from Chile and Mexico*, Inv. Nos. 731-TA-926–927 (Preliminary), USITC Pub. 3432 at 6 (June 2001).

Petitioner argues that in this investigation, the temporal difference between fresh winter and fresh non-winter strawberries is only one factor in addition to other factors that distinguish the two types of strawberries.<sup>38</sup>

*Respondents' Arguments.* The Driscoll's Respondents and San Vicente argue that an analysis of the Commission's traditional domestic like product factors shows that there are no clear dividing lines between fresh winter strawberries and fresh non-winter strawberries, and therefore the Commission should expand the definition of the domestic like product to include fresh non-winter strawberries.<sup>39</sup>

### C. Analysis

Based on the record in these preliminary phase investigations, we define a single domestic like product consisting of all fresh strawberries (winter and non-winter).

#### 1. Fresh Winter Strawberries Versus Fresh Non-Winter Strawberries

*Physical Characteristics and Uses.* All strawberries are fruit of the plant *Fragaria x ananassa*, typically red in color.<sup>40</sup> They are typically consumed fresh, either alone or incorporated in food dishes.<sup>41</sup> The large majority of responding domestic producers reported that there are no differences between fresh winter strawberries and fresh non-winter strawberries with respect to physical characteristics and uses, though a minority reported that the two are different (unspecified) varieties of *Fragaria x ananassa*.<sup>42</sup> Nearly all responding

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<sup>38</sup> Petitioner's Postconf. Br., Exhibit 1 at 37.

<sup>39</sup> Driscoll's Respondents' Postconf. Br. at 2, Appendix A at 1–9; San Vicente's Postconf. Br. at 5–30. The Aneberries Respondents did not address the definition of the domestic like product. In the alternative, San Vicente appears to argue that if the Commission confines the domestic like product to fresh winter strawberries based on differences between Florida winter varieties and California varieties that yield strawberries both in the winter and at other times, it would need to recognize two separate domestic like products, one consisting of strawberries harvested or shipped in winter from Florida and the other of strawberries harvested or shipped in winter from California that produce strawberries in winter and other times. San Vicente's Postconf. Br. at 7–12.

<sup>40</sup> CR/PR at 1.9.

<sup>41</sup> CR/PR at 1.4, 1.9.

<sup>42</sup> CR/PR at Tables 1.3 & D.1. Specifically, 23 domestic producers reported that fresh winter strawberries and fresh non-winter strawberries are fully comparable with respect to physical characteristics and uses, one producer reported that the products are mostly comparable, two reported that they are only somewhat comparable, and nine reported that they are never comparable. *Id.* at Table 1.3. In their narrative responses, only two producers reported that winter strawberry varieties are different than non-winter strawberry varieties, while the overwhelming majority reported that the products are the same. *Id.* at Table D.1.

importers reported that fresh winter strawberries and fresh non-winter strawberries are fully or mostly comparable with respect to this factor.<sup>43</sup>

*Manufacturing Facilities, Production Processes, and Production Employees.* Most domestic producers reported that fresh winter strawberries and fresh non-winter strawberries are grown using the same methods.<sup>44</sup> According to Petitioner, fresh winter strawberries are generally harvested November through March.<sup>45</sup> Of the responding domestic producers, a majority (\*\*\*) producers) grow both winter and non-winter strawberries.<sup>46</sup> All responding importers reported that fresh winter strawberries and fresh non-winter strawberries are fully or mostly comparable with respect to this factor.<sup>47</sup>

*Channels of Distribution.* During the January 2022–September 2025 period of investigation (“POI”), domestic producers split the large majority of their U.S. shipments of fresh winter strawberries evenly between distributors and retailers.<sup>48</sup> Domestic producers shipped the majority of their U.S. shipments of fresh non-winter strawberries to retailers, with a significant portion going to distributors.<sup>49</sup> Most domestic producers reported that there are no differences between fresh winter strawberries and fresh non-winter strawberries with

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<sup>43</sup> CR/PR at Table 1.3. Specifically, six responding importers reported that fresh winter strawberries and fresh non-winter strawberries are fully comparable with respect to physical characteristics and uses, four importers reported that the products are mostly comparable, and one importer reported that the two products are only somewhat comparable. *Id.* We also note that differences between varieties of strawberry plants do not necessarily imply the existence of commercially significant or even perceptible differences in the product they yield, *i.e.*, strawberries, such as where varieties are bred primarily for particular growing characteristics such as fungus or pest resistance. *See id.* at 1.10.

<sup>44</sup> CR/PR at Tables 1.3 & D.1. Specifically, 26 domestic producers reported that fresh winter strawberries and fresh non-winter strawberries are fully comparable with respect to manufacturing facilities, production processes, and production employees, while eight producers reported that the two products are never comparable with respect to this factor. *Id.* at Table 1.3.

<sup>45</sup> *See Response to First Supplemental Questionnaire Volume I: Common Issues and Injury Petition*, EDIS Doc. 868692, Exhibit I-1SUPP-4 (Jan. 12, 2026) (revised scope).

<sup>46</sup> CR/PR at Table 1.5. Of the responding domestic producers, \*\*\* grow only fresh winter strawberries, \*\*\* grow only fresh non-winter strawberries, and \*\*\* grow both. *Id.*

<sup>47</sup> CR/PR at Table 1.3. Specifically, eight responding importers reported that fresh winter strawberries and fresh non-winter strawberries are fully comparable with respect to manufacturing facilities, production processes, and production employees, and one importer reported that the two products are mostly comparable with respect to this factor. *Id.*

<sup>48</sup> CR/PR at Table 1.4. Domestic producers sold between \*\*\* and \*\*\* percent of fresh winter strawberries to distributors, between \*\*\* and \*\*\* percent to retailers, and between \*\*\* and \*\*\* percent to end users on an annual basis during 2022–2024. *Id.*

<sup>49</sup> CR/PR at Table 1.4. Domestic producers sold between \*\*\* and \*\*\* percent of fresh non-winter strawberries to distributors, between \*\*\* and \*\*\* percent to retailers, and between \*\*\* and \*\*\* percent to end users on an annual basis during 2022–2024. *Id.*

respect to channels of distribution.<sup>50</sup> All responding importers reported that fresh winter strawberries and fresh non-winter strawberries are fully or mostly comparable with respect to this factor.<sup>51</sup>

*Interchangeability.* The current record indicates that fresh winter strawberries and fresh non-winter strawberries are generally interchangeable in that they are all strawberries. Most responding domestic producers reported that fresh winter strawberries and fresh non-winter strawberries are interchangeable because there is no physical difference between the two.<sup>52</sup> All responding importers reported that fresh winter strawberries and fresh non-winter strawberries are fully or mostly comparable with respect to this factor.<sup>53</sup> Given that fresh strawberries have a shelf life of two weeks,<sup>54</sup> fresh strawberries harvested on any given day are interchangeable for consumption in fresh form in the strictest sense only with fresh strawberries harvested two weeks before or two weeks after. Thus, in the strictest temporal sense, fresh winter strawberries and fresh non-winter strawberries are not interchangeable other than during the beginning and ending months of the period defining fresh winter strawberries and the two weeks prior to and after those months, respectively. However, for the same reason, fresh winter strawberries are only interchangeable with each other if harvested within two weeks of each other. For strawberries purchased for freezing or processing, however, which represent approximately one-fifth of U.S. strawberry production,<sup>55</sup> fresh winter strawberries may be more fully interchangeable with fresh non-winter strawberries insofar as frozen, canned, or preserved strawberries have sufficiently long shelf-life to carry over into the next season or seasons.

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<sup>50</sup> CR/PR at Tables 1.3 & D.1. Specifically, 26 domestic producers reported that fresh winter strawberries and fresh non-winter strawberries are fully comparable with respect to channels of distribution, while eight producers reported that the two products are never comparable with respect to this factor. *Id.* at Table 1.3.

<sup>51</sup> CR/PR at Table 1.3. Specifically, eight responding importers reported that fresh winter strawberries and fresh non-winter strawberries are fully comparable with respect to channels of distribution, and three importers reported that the two products are mostly comparable with respect to this factor. *Id.*

<sup>52</sup> CR/PR at Tables 1.3 & D.1. Specifically, 26 domestic producers reported that fresh winter strawberries and fresh non-winter strawberries are fully comparable with respect to interchangeability, while eight producers reported that the two products are never comparable with respect to this factor. *Id.* at Table 1.3.

<sup>53</sup> CR/PR at Table 1.3. Specifically, ten responding importers reported that fresh winter strawberries and fresh non-winter strawberries are fully comparable with respect to interchangeability, and one importer reported that the two products are mostly comparable with respect to this factor. *Id.*

<sup>54</sup> CR/PR at 1.9.

<sup>55</sup> CR/PR at Table 3.11.

*Producer and Customer Perceptions.* Most responding domestic producers reported that producers and customers view fresh winter strawberries and fresh non-winter strawberries as the same product, although some responding producers claimed that the products are similar but not identical.<sup>56</sup> Nearly all responding importers reported that fresh winter strawberries and fresh non-winter strawberries are fully or mostly comparable with respect to this factor.<sup>57</sup>

*Price.* The average unit values (“AUVs”) of domestic producers’ U.S. shipments of fresh winter strawberries were higher than the AUVs of their U.S. shipments of fresh non-winter strawberries during the POI.<sup>58</sup> Most responding producers reported that there are no differences in price between fresh winter strawberries and fresh non-winter strawberries, but a minority reported that winter prices are higher because fewer strawberries are available.<sup>59</sup> Most responding importers reported that fresh winter strawberries and fresh non-winter strawberries are fully or mostly comparable with respect to this factor.<sup>60</sup>

*Conclusion.* The record evidence shows that all fresh strawberries overlap substantially with respect to physical characteristics and uses; manufacturing facilities, production processes,

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<sup>56</sup> CR/PR at Tables 1.3 & D.1. Specifically, 21 domestic producers reported that fresh winter strawberries and fresh non-winter strawberries are fully comparable with respect to producer and customer perceptions, three producers reported that the products are mostly comparable, two reported that they are only somewhat comparable, and nine reported that they are never comparable. *Id.* at Table 1.3.

<sup>57</sup> CR/PR at Table 1.3. Specifically, two responding importers reported that fresh winter strawberries and fresh non-winter strawberries are fully comparable with respect to producer and customer perceptions, eight importers reported that the products are mostly comparable, and one importer reported that the two products are only somewhat comparable. *Id.*

<sup>58</sup> CR/PR at Table 1.6. The AUVs of domestic producers’ U.S. shipments of fresh winter strawberries were \$\*\*\* per pound in 2022, \$\*\*\* per pound in 2023, and \$\*\*\* per pound in 2024; they were \$\*\*\* per pound in interim 2025 compared to \$\*\*\* per pound in interim 2024. *Id.* By comparison, the AUVs of domestic producers’ U.S. shipments of fresh non-winter strawberries were \$\*\*\* per pound in 2022, \$\*\*\* per pound in 2023, and \$\*\*\* per pound in 2024; they were \$\*\*\* per pound in interim 2025 compared to \$\*\*\* per pound in interim 2024. These AUVs were calculated based on the scope in the petition, which defined fresh winter strawberries as those harvested or entered between October 1 and March 31.

<sup>59</sup> CR/PR at Tables 1.3 & D.1. Specifically, 19 domestic producers reported that fresh winter strawberries and fresh non-winter strawberries are fully comparable with respect to price, three producers reported that the products are mostly comparable, and 12 reported that they are never comparable. *Id.* at Table 1.3.

<sup>60</sup> CR/PR at Table 1.3. Specifically, two responding importers reported that fresh winter strawberries and fresh non-winter strawberries are fully comparable with respect to price, five importers reported that the products are mostly comparable, two importers reported that the two products are only somewhat comparable, and two importers reported that the products are never comparable. *Id.*

and production employees; channels of distribution; and producer and customer perceptions. Although strawberries harvested in any given period may not be strictly interchangeable in the fresh market with strawberries harvested even a month later, we see no clear dividing lines based on date or variety characteristics, and the interchangeability in the processing and freezing markets further blurs any distinctions. With respect to price, questionnaire responses indicate that the premium paid for fresh winter strawberries may be a function of scarcity rather than any inherent differences between those strawberries and fresh non-winter strawberries.<sup>61</sup>

We recognize that a minority of producers reported differences between winter and non-winter strawberries, and that a report submitted by Petitioner concluded that \*\*\*.<sup>62</sup> We do not see this evidence as indicating the existence of a clear dividing line between fresh winter strawberries, as defined in temporal terms by Petitioner, and other strawberries. The harvesting period may vary each year, starting sooner or ending later, and will likely vary depending on how far south or north a particular field is within Florida or California.<sup>63</sup> In addition, under Petitioner’s proposed definition, a strawberry harvested from the same plant at the same farm would be a different domestic like product if it was harvested one day before or one day after the proposed monthly boundaries of fresh winter strawberries.<sup>64</sup> We do not consider the mere date on which a strawberry is harvested in view of the record evidence in this investigation to indicate a clear dividing line. Although strawberries grown in Florida and

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<sup>61</sup> CR/PR at Tables 1.3 & D.1; *see also id.* at Tables 3.7 & 3.9 (showing lower production of strawberries in November through March compared to the remaining months).

<sup>62</sup> Petitioner’s Postconf. Br., Exhibit 5 at 6.

<sup>63</sup> We note that Petitioner has endorsed a variety of dates for the onset or end of winter, indicated as October 1 in the original scope, as November 1 in the revised scope, and as “\*\*\*” in Petitioner’s report. *See* Petition, vol. I, at 4; *Response to First Supplemental Questionnaire Volume I: Common Issues and Injury Petition*, EDIS Doc. 868692, Exhibit I-1SUPP-4 (Jan. 12, 2026); Petitioner’s Postconf. Br., Exhibit 5 at 1 (report stating that “\*\*\*”); *see also id.*, Exhibit 1 at 50 (“in the alternative, Petitioner would not oppose – for purposes of the preliminary phase investigation – a domestic like product that either is defined, in part, as harvested during the Winter season or in the alternative in the addition of the shoulder month of April to the time period included in the scope definition”); *id.*, Exhibit 12 at 5 (a bulletin from the USDA’s Economic Research Service stating, “Florida’s growing season is typically constrained to the winter months, between December and March”). This admitted uncertainty further supports our not finding a clear dividing line between fresh winter strawberries and other fresh strawberries. While Petitioner has described its original scope language including October in the winter months as a “scrivener’s error,” scope language in a petition is typically edited carefully by attorneys as agencies rely on it to gather information and assess whether a petition meets the requirements for initiation of an investigation, and market participants use it to learn what products an investigation or orders may cover.

<sup>64</sup> *See* San Vicente’s Postconf. Br. at 15–16.

California in different seasons may differ due to climate and soil differences, or genetic characteristics, that may also be true of strawberries grown in either state in the same season.<sup>65</sup> And, finally, the record contains no evidence that the differences suggested by Petitioner are at all recognized by ultimate consumers (aside from the obvious fact that winter strawberries are purchased in the winter and non-winter strawberries are purchased in other seasons).

Therefore, the evidence considered as a whole indicates no clear dividing lines between fresh winter strawberries, as defined in the petition, and other strawberries. Accordingly, we define a single domestic like product consisting of all fresh strawberries.<sup>66</sup>

#### **IV. Domestic Industry**

The domestic industry is defined as the domestic “producers as a whole of a domestic like product, or those producers whose collective output of a domestic like product constitutes a major proportion of the total domestic production of the product.”<sup>67</sup> In defining the domestic industry, the Commission’s general practice has been to include in the industry producers of all domestic production of the like product, whether toll-produced, captively consumed, or sold in the domestic merchant market.

These investigations raise two sets of domestic industry issues. The first concerns whether the Commission should analyze injury to a regional industry pursuant to 19 U.S.C. § 1677(4)(C). Petitioner advocates a 28-state regional industry defined as all states east of the Mississippi River plus Louisiana and Texas.<sup>68</sup> The second concerns whether appropriate circumstances exist to exclude any domestic producer from the domestic industry pursuant to the related parties provision.

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<sup>65</sup> Additionally, although Petitioner’s report \*\*\*, Driscoll’s submitted \*\*\*. *Compare* Petitioner’s Postconf. Br., Exhibit 5 at 5, *with* Driscoll’s Respondents’ Postconf. Br., Appendix A at 2, Exhibit 38. We also note that Driscoll’s strawberry grading standards \*\*\*. Driscoll’s Respondents’ Postconf. Br., Exhibit 8 at 31.

<sup>66</sup> In any final phase of the investigations, parties wishing to raise domestic like product and industry issues must do so in their comments on the draft questionnaires. 19 C.F.R. § 207.20(b). Parties must clearly identify and explain the bases for the proposed domestic like product and industry definitions and indicate the new information that would need to be collected for consideration of the proposed definitions.

<sup>67</sup> 19 U.S.C. § 1677(4)(A).

<sup>68</sup> Petition, vol. I, at 2–3, Exhibit I-4.

## A. Regional Industry

The statute's provision on regional industries, at 19 U.S.C. § 1677(4)(C), provides that:

In appropriate circumstances, the United States, for a particular product market, may be divided into 2 or more markets and the producers within each market may be treated as if they were a separate industry if—

(i) the producers within such market sell all or almost all of their production of the like product in question in that market, and

(ii) the demand in that market is not supplied, to any substantial degree, by producers of the product in question located elsewhere in the United States.

In such appropriate circumstances, material injury, the threat of material injury, or material retardation of the establishment of an industry may be found to exist with respect to an industry even if the domestic industry as a whole, or those producers whose collective output of a domestic like product constitutes a major proportion of the total domestic production of that product, is not injured, if there is a concentration of dumped imports or imports of merchandise benefitting from a countervailable subsidy into such an isolated market and if the producers of all, or almost all, of the production within that market are being materially injured or threatened by material injury, or if the establishment of an industry is being materially retarded, by reason of the dumped imports or imports of merchandise benefitting from a countervailable subsidy. The term “regional industry” means the domestic producers within a region who are treated as a separate industry under this subparagraph.<sup>69</sup>

This provision includes a number of factors that must be considered in defining a regional industry. These include two market isolation criteria: (i) whether the producers within

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<sup>69</sup> 19 U.S.C. § 1677(4)(C). This language derives in large part from the Trade Agreements Act of 1979. Pub. L. No. 96-39, § 101, 93 Stat. 144, 177 (1979) (“1979 Act”). The Uruguay Round Agreements Act (“URAA”) made only minor changes to the provision, adding a definition for “regional industry” as the last sentence, and requiring that Commerce “to the maximum extent possible, direct that duties be assessed only on the subject merchandise of the specific exporters or producers that exported the subject merchandise for sale in the region concerned during the period of investigation.” See Pub. L. No. 103-465, §§ 218 & 222(a)(2), 108 Stat. 4809, 4855 & 4869 (1994) (codified at 19 U.S.C. § 1673e(d)).

such market sell all or almost all of their production of the like product within the regional market, and (ii) whether the demand within the regional market is not supplied by producers of the like product located elsewhere in the United States.<sup>70</sup> The Commission has also considered defining a regional industry to be discretionary based on the language “in appropriate circumstances” and “may be treated,” and it has used this discretion to decline to define a regional industry even where the market isolation criteria may be satisfied.<sup>71</sup> Finally, the statute imposes two additional criteria for a finding of injury with respect to a regional industry: that there is a “concentration” of subject imports within the defined region, and that “all, or almost all” producers within the region are being injured.<sup>72</sup>

The Court of International Trade has described three steps for a regional industry analysis:

The Commission must determine that there is: (1) a regional market satisfying the requirements of the statute, (2) a concentration of dumped imports into the regional market, and (3) material injury or threat thereof to producers of all or almost all of the regional production . . . . *The Commission will move on to the next step only if each preceding step is satisfied.*<sup>73</sup>

The statute does not lay out criteria for identifying the boundaries of the “2 or more markets” into which “the United States . . . may be divided.” Where that issue is contested, the Commission has considered the boundaries of the proposed regional market and any proposed alternatives before addressing the statutory criteria.<sup>74</sup>

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<sup>70</sup> 19 U.S.C. § 1677(4)(C)(i) & (ii).

<sup>71</sup> See, e.g., *Rock Salt from Canada*, Inv. No. 731-TA-239 (Final), USITC Pub. 1798 at 6–10 (Jan. 1986) (finding that statutory criteria were satisfied but declining to adopt regional industry due to arbitrariness of petitioner’s proposed region); *Steel Concrete Reinforcing Bar from Belarus, China, Indonesia, Korea, Latvia, Moldova, Poland, and Ukraine*, Inv. Nos. 731-TA-873–875, 877–880, 882 (Review), USITC Pub. 3933 at 11 (July 2007) (declining to adopt proposed regional industry although statutory criteria satisfied because of large area included in proposed region that encompassed over 70 percent of US consumption and production). Because we find in this instance that the statutory criteria are not met, we do not reach the issue of whether appropriate circumstances otherwise exist to consider injury to a regional industry, or whether additional statutory requirements such as “a concentration of dumped imports” into the regional market are satisfied for purposes of finding injury to a regional industry. 19 U.S.C. § 1677(4)(C).

<sup>72</sup> 19 U.S.C. § 1677(4)(C).

<sup>73</sup> *Tex. Crushed Stone Co. v. United States*, 822 F. Supp. 773, 777 (Ct. Int’l Trade 1993) (emphasis added), *aff’d*, 35 F.3d 1535 (Fed. Cir. 1994).

<sup>74</sup> See, e.g., *Rebar from Turkey*, Inv. No. 731-TA-745 (Final), USITC Pub. 3034 at 10–14 (April 1997).

## 1. Arguments of the Parties

*Petitioner's Arguments.* Petitioner argues that the perishable and seasonal nature of fresh winter strawberries, plus the distance – 2,225 miles – between the two primary strawberry growing regions in the United States, support a regional industry analysis.<sup>75</sup> It argues that the defined regional industry satisfies the statutory factors and that imports are concentrated in the region.<sup>76</sup> Petitioner also contends that the Commission should exclude Driscoll's as a related party before conducting the regional industry analysis.<sup>77</sup>

*Respondents' Arguments.* Respondents argue that Petitioner's definition of the regional industry is arbitrary and does not meet the statutory requirements.<sup>78</sup> They contend that the states in the region are contiguous with the out-of-region states, and refrigerated transport permits firms to ship strawberries nationwide.<sup>79</sup> They also argue that Petitioner arbitrarily included Texas, one of only two within-region states west of the Mississippi River, because that is where most strawberries cross the border from Mexico.<sup>80</sup> Alternatively, if the Commission finds a regional industry, respondents argue that imports are not concentrated in the region, and therefore the Commission must make a negative injury determination.<sup>81</sup>

## 2. Analysis<sup>82</sup>

As an initial matter, notwithstanding respondents' argument that the proposed regional industry is arbitrary, no party argues for a definition of the proposed region different from that in the petition. Therefore, our analysis is conducted based on Petitioner's proposed region.<sup>83</sup>

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<sup>75</sup> Petitioner's Postconf. Br. at 9–10, Exhibit 1 at 13–16.

<sup>76</sup> Petitioner's Postconf. Br., Exhibit 1 at 16–30.

<sup>77</sup> Petitioner's Postconf. Br., Exhibit 1 at 25–28.

<sup>78</sup> Aneberries Respondents' Postconf. Br. at 2–6; Driscoll's Respondents' Postconf. Br. at 3, Appendix A at 11–15; San Vicente's Postconf. Br. at 31–37.

<sup>79</sup> Driscoll's Respondents' Postconf. Br., Appendix A at 10–11; San Vicente's Postconf. Br. at 32–33.

<sup>80</sup> Driscoll's Respondents' Postconf. Br., Appendix A at 12; San Vicente's Postconf. Br. at 32–33.

<sup>81</sup> Aneberries Respondents' Postconf. Br. at 6–8; Driscoll's Respondents' Postconf. Br. at 3–4, Appendix A at 15–19; San Vicente's Postconf. Br. at 38–40.

<sup>82</sup> Petitioner contends that the Commission should address related parties issues prior to regional industry issues, that it should exclude Driscoll's as a related party, and that the Commission should base its regional industries analysis on data excluding Driscoll's. Our finding below in section IV.B.2 that appropriate circumstances do not exist to exclude Driscoll's as a related party would not have changed if we conducted the analysis prior to our analysis of regional industries issues.

<sup>83</sup> We note that Petitioner's proposed region contains about 80 percent of the total U.S. population. Conf. Tr. at 147 (Eppard); *see also id.* at 159 (Wiemer) (stating that “{r}oughly 70 percent of (Continued...)”).

The first market isolation criterion specifies that the producers within the region must “sell all or almost all of their production of the like product in question in that market.”<sup>84</sup> In previous investigations, the Commission divided the volume of regional producers’ commercial shipments within the region by the volume of their total U.S. shipments (excluding exports), and it has found levels of shipments that vary from 80 percent to over 95 percent to satisfy the criterion.<sup>85</sup>

Producers within the region proposed by Petitioner shipped more than \*\*\* percent of their U.S. shipments of fresh strawberries within the region throughout the period of investigation.<sup>86</sup> We find that this level satisfies the first statutory market isolation criterion.

The second market isolation criterion is that “the demand in the market is not supplied, to any substantial degree, by producers of the product in question located elsewhere in the United States.”<sup>87</sup> Although the Commission has stated that no precise numerical cutoff exists for outside supply that would disqualify an area from regional industry status,<sup>88</sup> the Court of International Trade has suggested that certain levels “in the abstract” may be too high to satisfy this criteria without specifying what these levels may be.<sup>89</sup> In past investigations, the Commission has typically found that U.S. producers outside a region supplying 10 percent or

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the population of the United States lives east of the Mississippi {River}”); *id.* at 244 (Prusa) (stating that “about 60 to 65 percent of the American population lives east of the Mississippi River, and that’s not including Louisiana and Texas”).

<sup>84</sup> 19 U.S.C. § 1677(4)(C).

<sup>85</sup> *See, e.g., Gray Portland Cement and Cement Clinker from Venezuela*, Inv. Nos. 303-TA-21 and 731-TA-519 (Preliminary), USITC Pub. 2400 at 7, 27 (July 1991) (over 95 percent found to be sufficient); *Gray Portland Cement and Cement Clinker from Japan*, Inv. No. 731-TA-461 (Final), USITC Pub. 2376 at 18, 44 (Apr. 1991) (82.6 percent found to be sufficient); *Operators for Jalousie and Awning Windows from El Salvador*, Inv. Nos. 701-TA-272 and 731-TA-319 (Final), USITC Pub. 1934 at 9 (Jan. 1987) (recognizing that the Commission has found over 80 percent to be sufficient); *Fall Harvested Round White Potatoes from Canada*, Inv. No. 731-TA-124 (Final), USITC Pub. 1463 at 7 (Dec. 1983) (over 84 percent found to be sufficient).

<sup>86</sup> CR/PR at Table 1.10.

<sup>87</sup> 19 U.S.C. § 1677(4)(C).

<sup>88</sup> *See, e.g., Cut-to-Length Carbon Steel Plate from Germany*, Inv. No. 731-TA-147 (Preliminary-Remand), USITC Pub. 1550 at 9 (July 1984).

<sup>89</sup> *Atl. Sugar, Ltd. v. United States*, 2 C.I.T. 295, 298 (1981) (suggesting that a level of approximately 12 percent of total supply from outside the region may be too high to be considered insubstantial “{i}n the abstract,” but nonetheless affirming a Commission determination holding that the second market isolation criterion was satisfied when 12 percent of regional consumption was supplied by producers outside the region).

less of a region's supply supported definition of a regional industry,<sup>90</sup> but that out-of-region supply greater than 25 percent was too large to support finding a regional industry.<sup>91</sup>

The percentage of consumption within the region supplied by U.S. producers outside the region was substantial during the POI. Their share increased over that period and surpassed the share of within-region producers and all imports, combined, in interim 2025. Specifically, the share of regional consumption supplied by U.S. producers outside the region was \*\*\* percent in 2022, \*\*\* percent in 2023, and \*\*\* percent in 2024; out-of-region U.S. producers had a \*\*\* percent share of within-region consumption in interim 2025, compared to a \*\*\* percent share in interim 2024.<sup>92</sup>

Accordingly, we find that the proposed regional industry fails this criterion and, therefore, proceed to analyze injury on a nationwide basis. We do, however, consider as a condition of competition that, while within-region producers ship \*\*\* percent of their sales over 1,000 miles from their production facilities and producers nationally ship \*\*\* percent over 1,000 miles, the within-region producers ship most of their production of fresh strawberries to states within the proposed region.<sup>93</sup>

## **B. Related Parties**

We next determine whether any producer of the domestic like product should be excluded from the domestic industry pursuant to section 771(4)(B) of the Tariff Act. This provision allows the Commission, if appropriate circumstances exist, to exclude from the domestic industry producers that are related to an exporter or importer of subject merchandise

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<sup>90</sup> See, e.g., *Gray Portland Cement and Cement Clinker from Mexico*, Inv. No. 731-TA-451 (Final), USITC Pub. 2305 at 15 (Aug. 1990) (between 8 and 8.5 percent acceptable); *Sugars and Sirups from Canada*, Inv. No. 731-TA-3 (Final), USITC Pub. 1047 at 4, 14 (Mar. 1980) (5.5 percent acceptable); *Portland Hydraulic Cement from Australia and Japan*, Inv. Nos. 731-TA-108, 109 (Preliminary), USITC Pub. 1310 at 9 (Nov. 1982) (less than 10 percent acceptable).

<sup>91</sup> See, e.g., *Frozen French Fried Potatoes from Canada*, Inv. No. 731-TA-93 (Preliminary), USITC Pub. 1259 at 7 (June 1982) (over 30 percent not acceptable); *12-Volt Lead-Acid Type Automotive Storage Batteries from Korea*, Inv. No. 731-TA-261 (Preliminary), USITC Pub. 1710 at 8 (June 1985) (levels between 25 and 50 percent not acceptable); *Light-Walled Rectangular Pipe and Tube from Mexico*, Inv. No. 731-TA-730 (Preliminary), USITC Pub. 2892 at I-9 (May 1995).

<sup>92</sup> CR/PR at Table 1.11.

<sup>93</sup> CR/PR at 2.4.

or which are themselves importers.<sup>94</sup> Exclusion of such a producer is within the Commission's discretion based upon the facts presented in each investigation.<sup>95</sup>

## 1. Arguments of the Parties

*Petitioner's Arguments.* Petitioner argues that Driscoll's does not actually produce strawberries, but rather appears to be a toller, marketer, importer, and foreign producer.<sup>96</sup> It contends that the Commission should exclude Driscoll's as a related party because of its large volume of imports.<sup>97</sup> Petitioner claims that Driscoll's benefits from dumped subject imports such that its inclusion in the domestic industry could mask injury.<sup>98</sup> It contends that the primary interest of Driscoll's is importation.<sup>99</sup>

*Respondents' Arguments.* The Driscoll's Respondents acknowledge that Driscoll's, \*\*\*, and \*\*\* may qualify as related parties.<sup>100</sup> They claim that Driscoll's interest primarily lies in domestic production and that removing it from the domestic industry would skew the

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<sup>94</sup> See *Torrington Co. v. United States*, 790 F. Supp. 1161, 1168 (Ct. Int'l Trade 1992), *aff'd without opinion*, 991 F.2d 809 (Fed. Cir. 1993); *Sandvik AB v. United States*, 721 F. Supp. 1322, 1331–32 (Ct. Int'l Trade 1989), *aff'd mem.*, 904 F.2d 46 (Fed. Cir. 1990); *Empire Plow Co. v. United States*, 675 F. Supp. 1348, 1352 (Ct. Int'l Trade 1987).

<sup>95</sup> The primary factors the Commission has examined in deciding whether appropriate circumstances exist to exclude a related party include the following:

- (1) the percentage of domestic production attributable to the importing producer;
- (2) the reason the U.S. producer has decided to import the product subject to investigation (whether the firm benefits from the LTFV sales or subsidies or whether the firm must import in order to enable it to continue production and compete in the U.S. market);
- (3) whether inclusion or exclusion of the related party will skew the data for the rest of the industry;
- (4) the ratio of import shipments to U.S. production for the imported product; and
- (5) whether the primary interest of the importing producer lies in domestic production or importation.

*Changzhou Trina Solar Energy Co. v. USITC*, 100 F. Supp. 3d 1314, 1326–31 (Ct. Int'l. Trade 2015), *aff'd*, 879 F.3d 1377 (2018); see also *Torrington Co.*, 790 F. Supp. at 1168.

<sup>96</sup> Petitioner's Postconf. Br., Exhibit 1 at 3–4.

<sup>97</sup> Petitioner's Postconf. Br., Exhibit 1 at 4–5.

<sup>98</sup> Petitioner's Postconf. Br., Exhibit 1 at 5–6.

<sup>99</sup> Petitioner's Postconf. Br., Exhibit 1 at 7–9.

<sup>100</sup> Driscoll's Respondents' Postconf. Br., Appendix A at 21. The Driscoll's Respondents argue that the record evidence is insufficient to make a finding as to whether \*\*\* qualifies as a related party. *Id.*, Appendix A at 21 n.80.

industry's data significantly.<sup>101</sup> They also claim that the production of \*\*\* greatly exceeds its imports, showing that its primary interest also lies with production.<sup>102</sup> No other respondents addressed related parties.

## 2. Analysis

Domestic producer Driscoll's is subject to possible exclusion under the related party provision pursuant to section 771(4)(B)(i) of the Tariff Act because it imported subject merchandise from Mexico during the POI and pursuant to section 771(4)(B)(ii)(I) because it owns Driscoll's (Mexico), a subject producer and exporter in Mexico.<sup>103</sup> Domestic producer \*\*\* is a related party pursuant to section 771(4)(B)(ii)(III) because \*\*\* owns both it and \*\*\*, which is an importer of subject merchandise.<sup>104</sup> \*\*\* may qualify as a related party pursuant to section 771(4)(B)(ii)(III) because of its affiliation with subject importer \*\*\* and subject producers/exporters \*\*\* and \*\*\*.<sup>105</sup>

*Driscoll's.* Driscoll's accounted for a combined \*\*\* percent of domestic production of all fresh strawberries nationally in 2024, making it \*\*\* domestic producer that year.<sup>106</sup> Its subject imports totaled \*\*\* pounds in 2022, \*\*\* pounds in 2023, and \*\*\* pounds in 2024; it imported \*\*\* pounds in interim 2025 compared to \*\*\* pounds in interim 2024.<sup>107</sup> In comparison, Driscoll's produced \*\*\* pounds of fresh strawberries in 2022, \*\*\* pounds in 2023, and \*\*\* pounds in 2024; it produced \*\*\* pounds in interim 2025 compared to \*\*\* pounds in interim 2024.<sup>108</sup> Accordingly, the ratio of its subject imports to its domestic production was \*\*\* percent in 2022, \*\*\* percent in 2023, and \*\*\* percent in 2024; that ratio was \*\*\* percent in interim 2025 compared to \*\*\* percent in interim 2024.<sup>109</sup> Driscoll's stated that it imports

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<sup>101</sup> Driscoll's Respondents' Postconf. Br., Appendix A at 21–22.

<sup>102</sup> Driscoll's Respondents Postconf. Br., Appendix A at 22.

<sup>103</sup> CR/PR at Tables 3.3 & 3.19.

<sup>104</sup> CR/PR at Tables 3.3 & E.9; \*\*\*'s U.S. Importer Questionnaire Response at I-3. \*\*\*

<sup>105</sup> CR/PR at Table 3.3. \*\*\* reported a relationship with U.S. importer \*\*\*. *See id.*; \*\*\*'s U.S. Producer Questionnaire Response at I-6. \*\*\* described \*\*\* as its "\*\*\*\*." *Id.* This relationship does not appear to qualify \*\*\* as a related party under section 771(4)(B). In any event, \*\*\* did not report any financial data that could be excluded from the domestic industry data. *See* CR/PR at 6.1 n.4.

<sup>106</sup> CR/PR at Table E.1. \*\*\*. *Id.* The Commission's U.S. producer questionnaires requested that respondents separate their within-region production from their out-of-region production in two separate responses. Driscoll's was the only firm that reported both within-region and out-of-region production. The staff report refers to the former as "Driscoll's FL" and the latter as "Driscoll's CA."

<sup>107</sup> CR/PR at Table E.8.

<sup>108</sup> CR/PR at Table E.8.

<sup>109</sup> CR/PR at Table E.8.

strawberries from Mexico \*\*\*.<sup>110</sup> Driscoll's \*\*\*, stating that \*\*\*.<sup>111</sup> Its financial performance was \*\*\* the domestic industry averages in 2022 through 2024, but \*\*\* the domestic industry averages in interim 2024 and interim 2025.<sup>112</sup> Driscoll's opposes the petition.<sup>113</sup>

The record in this investigation indicates that Driscoll's primary interest is in domestic production. There is no information that Driscoll's imports benefited its domestic production operations to the extent that its inclusion in the domestic industry would mask injury. Further, to the extent that Driscoll's relationship with Driscoll's (Mexico) would allow domestic production by Driscoll's to be shielded from any injurious effect of Driscoll's (Mexico)'s exports to the United States,<sup>114</sup> there is no information on the record that the firm is shielded from subject imports by unrelated parties. For example, Driscoll's financial results do not diverge markedly from those of other producers, which suggests that this is not the case. We recognize, however, that Driscoll's was one of the largest importers of subject merchandise during the POI,<sup>115</sup> and we intend to investigate further in any final phase of this investigation the extent to which Driscoll's performance during the POI may be affected by its relationship to Driscoll's (Mexico) or its subject imports. In any event, Driscoll's also accounted for the majority of all domestic production (approximately \*\*\* in 2024).<sup>116</sup> Thus, excluding Driscoll's would result in a dataset that risks not being representative of the domestic industry as a whole. Absent firm evidence that its relationships with exporters, importers, and Mexican producers are skewing its data or masking injury, such an exclusion would provide a distorted view of the industry's performance. For these reasons, we find that appropriate circumstances do not exist to exclude Driscoll's from the domestic industry for purposes of the preliminary phase of this investigation.

\*\*\*. \*\*\* accounted for \*\*\* percent of domestic production of fresh strawberries nationally in 2024, making it the \*\*\* domestic producer that year.<sup>117</sup> Its affiliate \*\*\* subject imports totaled \*\*\* pounds in 2022, \*\*\* pounds in 2023, and \*\*\* pounds in 2024; it imported

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<sup>110</sup> CR/PR at Table 3.21.

<sup>111</sup> Driscoll's FL's U.S. Producer Questionnaire Response at III-13b, III-13c; Driscoll's CA's U.S. Producer Questionnaire Response at III-13b, III-13c, VI-15b, VI-15c.

<sup>112</sup> CR/PR at Table G.2.

<sup>113</sup> See, e.g., CR/PR at B.4.

<sup>114</sup> Driscoll's (Mexico)'s resales that were exported to the United States in 2024 totaled \*\*\* pounds. CR/PR at Table 7.3.

<sup>115</sup> In 2024, Driscoll's accounted for \*\*\* percent of the subject imports reported by respondents to the Commission's U.S. importer questionnaire, making it the \*\*\* responding importer. CR/PR at Table 4.1. Driscoll's subject imports represented at least \*\*\* of total subject imports reported in official import statistics throughout the POI. *Calculated from id.* at Tables E.8 & C.4.

<sup>116</sup> CR/PR at Table E.1.

<sup>117</sup> CR/PR at Table E.1. \*\*\*.

\*\*\* pounds in interim 2025 compared to \*\*\* pounds in interim 2024.<sup>118</sup> In comparison, \*\*\* produced \*\*\* pounds in 2022, \*\*\* pounds in 2023, and \*\*\* pounds in 2024; it produced \*\*\* pounds in interim 2025 compared to \*\*\* pounds in interim 2024.<sup>119</sup> Accordingly, the ratio of \*\*\* subject imports to \*\*\* domestic production was \*\*\* percent in 2022, \*\*\* percent in 2023, and \*\*\* percent in 2024; the ratio was \*\*\* percent in interim 2025 compared to \*\*\* percent in interim 2024.<sup>120</sup> \*\*\* reported that its reason for importing was to \*\*\*.<sup>121</sup> \*\*\* did not report any capital expenditures or R&D expenses during the POI.<sup>122</sup> The firm's financial performance was \*\*\* the domestic industry average in 2022, \*\*\* the average in 2023 and 2024, and \*\*\* the average in in interim 2025.<sup>123</sup> It \*\*\* the petition.<sup>124</sup>

As an initial matter, \*\*\* is too small for its inclusion or exclusion to skew the overall industry data or mask injury. In addition, the record in this investigation indicates that \*\*\* primary interest is in domestic production rather than the importation of subject merchandise. \*\*\* imported no subject merchandise itself during the POI, and the ratio of its affiliate's subject imports to \*\*\* domestic production was relatively low throughout the period.<sup>125</sup> Further, the record does not indicate that \*\*\* domestic production operations benefitted from or were shielded from the effects of subject imports by reason of its relationship with its affiliated importer \*\*\* to the extent that it would skew the domestic industry data or mask injury. For these reasons, we find that appropriate circumstances do not exist to exclude \*\*\* from the domestic industry.

\*\*\*. \*\*\* accounted for \*\*\* percent of domestic production of fresh strawberries nationally in 2024, making it the \*\*\* domestic producer that year.<sup>126</sup> Its affiliated importer \*\*\* subject imports totaled \*\*\* pounds in 2022, \*\*\* pounds in 2023, and \*\*\* pounds in 2024; it imported \*\*\* pounds in interim 2025 compared to \*\*\* pounds in interim 2024.<sup>127</sup> In comparison, \*\*\* produced \*\*\* pounds in 2022, \*\*\* pounds in 2023, and \*\*\* pounds in 2024; it produced \*\*\* pounds in interim 2025 compared to \*\*\* pounds in interim 2024.<sup>128</sup> Accordingly,

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<sup>118</sup> CR/PR at Table E.9.

<sup>119</sup> CR/PR at Table E.9. \*\*\*.

<sup>120</sup> CR/PR at Table E.9.

<sup>121</sup> CR/PR at Table 3.21.

<sup>122</sup> See \*\*\* U.S. Producer Questionnaire Response at III-13a, VI-15a.

<sup>123</sup> CR/PR at Tables G.1 & G.2.

<sup>124</sup> CR/PR at Table 3.1.

<sup>125</sup> Commissioner Jason E. Kearns does not join this statement regarding the import to production ratio.

<sup>126</sup> CR/PR at Table E.1. \*\*\*.

<sup>127</sup> \*\*\* U.S. Importer Questionnaire Response at II-5a.

<sup>128</sup> \*\*\* U.S. Producer Questionnaire Response at I-8. \*\*\*.

the ratio of \*\*\* subject imports to \*\*\* domestic production was \*\*\* percent in 2022, \*\*\* percent in 2023, and \*\*\* percent in 2024; the ratio was \*\*\* percent in interim 2025 compared to \*\*\* percent in interim 2024.<sup>129</sup> \*\*\* reported that its reason for importing was to \*\*\*.<sup>130</sup> Additionally, affiliated Mexican producer/exporter \*\*\* reported exporting \*\*\* pounds of subject merchandise to the United States in 2022, \*\*\* pounds in 2023, and \*\*\* pounds in 2024; it exported \*\*\* pounds of subject merchandise to the United States in both interim periods.<sup>131</sup> \*\*\* reported R&D expenses of \$\*\*\* in 2022, \$\*\*\* in 2023, and \$\*\*\* in 2024; it had R&D expenses of \$\*\*\* in interim 2025 compared to \$\*\*\* in interim 2024.<sup>132</sup> The firm's financial performance was \*\*\* the domestic industry average throughout the POI.<sup>133</sup> It \*\*\* the petition.<sup>134</sup>

The record does not contain information regarding the nature of the affiliations between \*\*\* and \*\*\*, \*\*\*, and \*\*\*, and therefore we do not have sufficient information to reach a finding as to whether \*\*\* qualifies as a related party through a control relationship.<sup>135</sup> Further, the record does not indicate that \*\*\* domestic production operations benefited from or were shielded from competition with subject imports in a way that would skew the domestic industry data. For these reasons, we find that appropriate circumstances do not exist to exclude \*\*\* from the domestic industry for purposes of this preliminary investigation.

Accordingly, consistent with our definition of the domestic like product, we define the domestic industry as all domestic producers of fresh strawberries (*i.e.*, fresh winter and non-winter strawberries).

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<sup>129</sup> *Calculated from* \*\*\* U.S. Importer Questionnaire Response at II-5a; \*\*\* U.S. Producer Questionnaire Response at I-8.

<sup>130</sup> \*\*\* U.S. Importer Questionnaire Response at II-4.

<sup>131</sup> \*\*\* Foreign Producer/Exporter Questionnaire Response at II-5b. Affiliated foreign producer/exporter \*\*\* did not respond to the Commission's questionnaires.

<sup>132</sup> *Calculated from* \*\*\* U.S. Producer Questionnaire Response at III-13a, VI-15a. \*\*\* did not report any capital expenditures during the POI. *Id.*

<sup>133</sup> CR/PR at Table G.2.

<sup>134</sup> CR/PR at 3.2, Table 3.1.

<sup>135</sup> We will investigate further the nature of the affiliations between these firms in any final phase of the investigations.

## V. Reasonable Indication of Material Injury by Reason of Subject Imports<sup>136</sup>

### A. Legal Standard

In the preliminary phase of antidumping and countervailing duty investigations, the Commission determines whether there is a reasonable indication that an industry in the United States is materially injured or threatened with material injury by reason of the imports under investigation.<sup>137</sup> In making this determination, the Commission must consider the volume of subject imports, their effect on prices for the domestic like product, and their impact on domestic producers of the domestic like product, but only in the context of U.S. production operations.<sup>138</sup> The statute defines “material injury” as “harm which is not inconsequential, immaterial, or unimportant.”<sup>139</sup> In assessing whether there is a reasonable indication that the domestic industry is materially injured by reason of subject imports, we consider all relevant economic factors that bear on the state of the industry in the United States.<sup>140</sup> No single factor is dispositive, and all relevant factors are considered “within the context of the business cycle and conditions of competition that are distinctive to the affected industry.”<sup>141</sup>

Although the statute requires the Commission to determine whether there is a reasonable indication that the domestic industry is “materially injured or threatened with material injury by reason of” unfairly traded imports,<sup>142</sup> it does not define the phrase “by reason of,” indicating that this aspect of the injury analysis is left to the Commission’s

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<sup>136</sup> Pursuant to section 771(24) of the Tariff Act, imports from a subject country of merchandise corresponding to a domestic like product that account for less than 3 percent of all such merchandise imported into the United States during the most recent 12 months for which data are available preceding the filing of the petition shall be deemed negligible. 19 U.S.C. §§ 1671d(b), 1673d(b), 1677(24)(A)(i). The exceptions to the general three percent rule are not applicable to this investigation.

During the 12-month period preceding filing of the petition (December 2024 to November 2025), subject imports from Mexico accounted for \*\*\* percent of total imports of fresh winter strawberries. CR/PR at Table 4.9. Because subject imports from Mexico exceed the three percent negligibility threshold, we find that imports of fresh winter strawberries from Mexico subject to the antidumping duty investigation are not negligible.

<sup>137</sup> 19 U.S.C. §§ 1671b(a), 1673b(a).

<sup>138</sup> 19 U.S.C. § 1677(7)(B). The Commission “may consider such other economic factors as are relevant to the determination” but shall “identify each {such} factor ... and explain in full its relevance to the determination.” 19 U.S.C. § 1677(7)(B).

<sup>139</sup> 19 U.S.C. § 1677(7)(A).

<sup>140</sup> 19 U.S.C. § 1677(7)(C)(iii).

<sup>141</sup> 19 U.S.C. § 1677(7)(C)(iii).

<sup>142</sup> 19 U.S.C. §§ 1671b(a), 1673b(a).

reasonable exercise of its discretion.<sup>143</sup> In identifying a causal link, if any, between subject imports and material injury to the domestic industry, the Commission examines the facts of record that relate to the significance of the volume and price effects of the subject imports and any impact of those imports on the condition of the domestic industry. This evaluation under the “by reason of” standard must ensure that subject imports are more than a minimal or tangential cause of injury and that there is a sufficient causal, not merely a temporal, nexus between subject imports and material injury.<sup>144</sup>

In many investigations, there are other economic factors at work, some or all of which may also be having adverse effects on the domestic industry. Such economic factors might include nonsubject imports; changes in technology, demand, or consumer tastes; competition among domestic producers; or management decisions by domestic producers. The legislative history explains that the Commission must examine factors other than subject imports to ensure that it is not attributing injury from other factors to the subject imports, thereby inflating an otherwise tangential cause of injury into one that satisfies the statutory material injury threshold.<sup>145</sup> In performing its examination, however, the Commission need not isolate

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<sup>143</sup> *Angus Chemical Co. v. United States*, 140 F.3d 1478, 1484–85 (Fed. Cir. 1998) (“{T}he statute does not ‘compel the commissioners’ to employ {a particular methodology}.”), *aff’g* 944 F. Supp. 943, 951 (Ct. Int’l Trade 1996).

<sup>144</sup> The Federal Circuit, in addressing the causation standard of the statute, observed that “{a}s long as its effects are not merely incidental, tangential, or trivial, the foreign product sold at less than fair value meets the causation requirement.” *Nippon Steel Corp. v. USITC*, 345 F.3d 1379, 1384 (Fed. Cir. 2003). This was further ratified in *Mittal Steel Point Lisas Ltd. v. United States*, 542 F.3d 867, 873 (Fed. Cir. 2008), where the Federal Circuit, quoting *Gerald Metals, Inc. v. United States*, 132 F.3d 716, 722 (Fed. Cir. 1997), stated that “this court requires evidence in the record ‘to show that the harm occurred ‘by reason of’ the LTFV imports, not by reason of a minimal or tangential contribution to material harm caused by LTFV goods.’” *See also Nippon Steel Corp. v. United States*, 458 F.3d 1345, 1357 (Fed. Cir. 2006); *Taiwan Semiconductor Industry Ass’n v. USITC*, 266 F.3d 1339, 1345 (Fed. Cir. 2001).

<sup>145</sup> *See* URAA, Statement of Administrative Action (SAA), H.R. Rep. No. 103-316, vol. I, at 851–52 (1994) (“{T}he Commission must examine other factors to ensure that it is not attributing injury from other sources to the subject imports.”); S. Rep. No. 96-249 at 75 (1979) (the Commission “will consider information which indicates that harm is caused by factors other than less-than-fair-value imports.”); H.R. Rep. No. 96-317 at 47 (1979) (“in examining the overall injury being experienced by a domestic industry, the ITC will take into account evidence presented to it which demonstrates that the harm attributed by the petitioner to the subsidized or dumped imports is attributable to such other factors”; those factors include “the volume and prices of nonsubsidized imports or imports sold at fair value, contraction in demand or changes in patterns of consumption, trade restrictive practices of and competition between the foreign and domestic producers, developments in technology and the export performance and productivity of the domestic industry”); *accord Mittal Steel*, 542 F.3d at 877.

the injury caused by other factors from injury caused by unfairly traded imports.<sup>146</sup> Nor does the “by reason of” standard require that unfairly traded imports be the “principal” cause of injury or contemplate that injury from unfairly traded imports be weighed against other factors, such as nonsubject imports, which may be contributing to overall injury to an industry.<sup>147</sup> It is clear that the existence of injury caused by other factors does not compel a negative determination.<sup>148</sup>

Assessment of whether material injury to the domestic industry is “by reason of” subject imports “does not require the Commission to address the causation issue in any particular way” as long as “the injury to the domestic industry can reasonably be attributed to the subject imports.”<sup>149</sup> The Commission ensures that it has “evidence in the record” to “show that the harm occurred ‘by reason of’ the LTFV imports,” and that it is “not attributing injury from other

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<sup>146</sup> SAA at 851–52 (“{T}he Commission need not isolate the injury caused by other factors from injury caused by unfair imports.”); *Taiwan Semiconductor Industry Ass’n*, 266 F.3d at 1345 (“{T}he Commission need not isolate the injury caused by other factors from injury caused by unfair imports ... Rather, the Commission must examine other factors to ensure that it is not attributing injury from other sources to the subject imports.” (emphasis in original)); *Asociacion de Productores de Salmon y Trucha de Chile AG v. United States*, 180 F. Supp. 2d 1360, 1375 (Ct. Int’l Trade 2002) (“{T}he Commission is not required to isolate the effects of subject imports from other factors contributing to injury” or make “bright-line distinctions” between the effects of subject imports and other causes.); see also *Softwood Lumber from Canada*, Inv. Nos. 701-TA-414 & 731-TA-928 (Remand), USITC Pub. 3658 at 100–01 (Dec. 2003) (Commission recognized that “{i}f an alleged other factor is found not to have or threaten to have injurious effects to the domestic industry, *i.e.*, it is not an ‘other causal factor,’ then there is nothing to further examine regarding attribution to injury” (citing *Gerald Metals*, 132 F.3d at 722 (the statute “does not suggest that an importer of LTFV goods can escape countervailing duties by finding some tangential or minor cause unrelated to the LTFV goods that contributed to the harmful effects on domestic market prices.”))).

<sup>147</sup> S. Rep. No. 96-249 at 74–75; H.R. Rep. No. 96-317 at 47.

<sup>148</sup> See *Nippon Steel Corp.*, 345 F.3d at 1381 (“{A}n affirmative material-injury determination under the statute requires no more than a substantial-factor showing. That is, the ‘dumping’ need not be the sole or principal cause of injury.”).

<sup>149</sup> *Mittal Steel*, 542 F.3d at 876, 878; see also *id.* at 873 (“While the Commission may not enter an affirmative determination unless it finds that a domestic industry is materially injured ‘by reason of’ subject imports, the Commission is not required to follow a single methodology for making that determination ... {and has} broad discretion with respect to its choice of methodology.” (citing *U.S. Steel Group v. United States*, 96 F.3d 1352, 1362 (Fed. Cir. 1996); S. Rep. No. 96-249 at 75)). In its decision in *Swiff-Train v. United States*, 793 F.3d 1355 (Fed. Cir. 2015), the Federal Circuit affirmed the Commission’s causation analysis as comports with the Court’s guidance in *Mittal*.

sources to the subject imports.”<sup>150</sup> The Federal Circuit has examined and affirmed various Commission methodologies and has disavowed “rigid adherence to a specific formula.”<sup>151</sup>

The question of whether the material injury threshold for subject imports is satisfied notwithstanding any injury from other factors is factual, subject to review under the substantial evidence standard.<sup>152</sup> Congress has delegated this factual finding to the Commission because of the agency’s institutional expertise in resolving injury issues.<sup>153</sup>

## **B. Conditions of Competition and the Business Cycle**

The following conditions of competition inform our analysis of whether there is a reasonable indication of material injury by reason of subject imports.<sup>154</sup>

### **1. Demand Conditions**

Strawberries are discretionary consumer items sold year-round in grocery stores.<sup>155</sup> Demand in the United States for strawberries was strong and increasing during the POI and is expected to continue to increase, particularly with consumers’ growing focus on healthy eating.<sup>156</sup> Most responding domestic producers and U.S. importers reported that overall U.S. demand for fresh winter strawberries steadily increased or fluctuated upward over the POI.<sup>157</sup>

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<sup>150</sup> *Mittal Steel*, 542 F.3d at 873, 877–79 (quoting *Gerald Metals*, 132 F.3d at 722). One relevant “other factor” may involve the presence of significant volumes of price-competitive nonsubject imports in the U.S. market, particularly when a commodity product is at issue. In appropriate cases, the Commission collects information regarding nonsubject imports and producers in nonsubject countries in order to conduct its analysis.

<sup>151</sup> *Nucor Corp. v. United States*, 414 F.3d 1331, 1336, 1341 (Fed. Cir. 2005); *see also Mittal Steel*, 542 F.3d at 879 (“*Bratsk* did not read into the antidumping statute a Procrustean formula for determining whether a domestic injury was ‘by reason’ of subject imports.”).

<sup>152</sup> We provide in our discussion below a full analysis of other factors alleged to have caused any material injury experienced by the domestic industry.

<sup>153</sup> *Mittal Steel*, 542 F.3d at 873; *Nippon Steel Corp.*, 458 F.3d at 1350 (citing *U.S. Steel Group*, 96 F.3d at 1357); S. Rep. No. 96-249 at 75 (“The determination of the ITC with respect to causation is ... complex and difficult, and is a matter for the judgment of the ITC.”).

<sup>154</sup> We note that, based on the scope, the questionnaires in this preliminary phase investigation collected certain information with respect to fresh winter strawberries only. Thus, while we have defined the domestic like product as all fresh strawberries, where appropriate we discuss herein questionnaire responses that relate to fresh winter strawberries.

<sup>155</sup> CR/PR at 2.7–2.8.

<sup>156</sup> CR/PR at 2.7–2.8.

<sup>157</sup> CR/PR at 2.8, Table 2.7. Twenty-four domestic producers reported that overall U.S. demand for fresh winter strawberries steadily increased during the POI, while three producers reported that demand for fresh winter strawberries steadily decreased or fluctuated downward. *Id.* at Table 2.7. (Continued...)

Twenty-four of 35 domestic producers and five of 11 responding U.S. importers reported that demand for fresh winter strawberries is subject to business cycles, driven by farms' planting and harvesting schedules, as well as increased customer purchases around holidays.<sup>158</sup>

Apparent U.S. consumption of fresh strawberries nationwide was relatively steady at \*\*\* pounds in 2022 and 2023 and then increased to \*\*\* pounds in 2024, for an overall increase of \*\*\* percent.<sup>159</sup> Apparent U.S. consumption was \*\*\* pounds in both interim 2024 and interim 2025.<sup>160</sup>

## 2. Supply Conditions

The domestic industry was the \*\*\* supply source for the U.S. market during the POI.<sup>161</sup> The industry's share of apparent U.S. consumption declined from \*\*\* percent in 2022 to \*\*\* percent in 2023 and then increased to \*\*\* percent in 2024, for an overall increase of \*\*\* percentage points.<sup>162</sup> Its share of \*\*\* percent in interim 2025 was \*\*\* percentage points higher than its \*\*\* percent share in interim 2024.<sup>163</sup>

Several firms announced expansions or new growing facilities during the POI.<sup>164</sup> Six of 36 responding producers reported that they experienced supply constraints during the POI related to weather disruptions, limited capacity of within-region producers to supply U.S. demand in winter months, and disease issues affecting plants.<sup>165</sup> Three firms reported supply constraints in 2022, four in 2023, six in 2024, and five in interim 2025.<sup>166</sup> According to USDA data, the acreage of strawberries planted increased from 56,400 acres in 2022 to 57,300 acres in 2023 and 61,500 acres in 2024.<sup>167</sup>

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Eight U.S. importers reported that overall U.S. demand for fresh winter strawberries steadily increased or fluctuated upward during the POI, while two importers reported that there was no change in demand. *Id.*

<sup>158</sup> CR/PR at 2.7–2.8.

<sup>159</sup> CR/PR at Table C.4. These apparent U.S. consumption figures include all fresh domestically grown strawberries, as well as all imports of in-scope and out-of-scope fresh strawberries.

<sup>160</sup> CR/PR at Table C.4.

<sup>161</sup> CR/PR at Table C.4.

<sup>162</sup> CR/PR at Table C.4.

<sup>163</sup> CR/PR at Table C.4.

<sup>164</sup> CR/PR at Tables 3.4 & 3.6.

<sup>165</sup> CR/PR at 2.7.

<sup>166</sup> CR/PR at Table 2.6.

<sup>167</sup> CR/PR at Table 3.10. The staff report relies on the USDA data because firms were inconsistent in how they responded to the practical capacity questions in the Commission's questionnaires. *Id.* at 3.28 n.5.

Subject imports were the \*\*\* supply source for the U.S. market during the POI.<sup>168</sup> Subject imports' share of apparent U.S. consumption decreased from \*\*\* percent in 2022 to \*\*\* percent in 2023 and then increased to \*\*\* percent in 2024, for an overall decrease of \*\*\* percentage points.<sup>169</sup> Their \*\*\* percent share of apparent U.S. consumption in interim 2025 was \*\*\* percentage points lower than their share of \*\*\* percent in interim 2024.<sup>170</sup> Seven of 11 responding importers reported that they experienced supply constraints during the POI related to weather disruptions and decreased production of fresh winter strawberries in Mexico and Florida during 2024.<sup>171</sup> Four firms reported supply constraints in 2022 and 2023, six in 2024, and four in interim 2025.<sup>172</sup>

Nonsubject imports were the \*\*\* supply source for the U.S. market during the POI.<sup>173</sup> Nonsubject imports' share of apparent U.S. consumption increased from \*\*\* percent in 2022 to \*\*\* percent in 2023 and then decreased to \*\*\* percent in 2024, for an overall decrease of \*\*\* percentage points.<sup>174</sup> Their \*\*\* percent share of apparent U.S. consumption in interim 2025 was \*\*\* percentage points higher than their share of \*\*\* percent in interim 2024.<sup>175</sup> Canada was the largest source of nonsubject imports during the POI.<sup>176</sup>

### 3. Substitutability and Other Conditions

Based on the record in the preliminary phase of these investigations, we find that there is a high degree of substitutability between subject imports and domestically produced fresh strawberries during the period in which subject imports are present in the market, November 1 through approximately March 31. The primary factors contributing to this level of substitutability include the similar physical characteristics and quality between domestically produced and imported fresh strawberries and limited evidence of consumer preference for a particular country of origin or producers.<sup>177</sup> We acknowledge that availability of subject

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<sup>168</sup> CR/PR at Table C.4.

<sup>169</sup> CR/PR at Table C.4.

<sup>170</sup> CR/PR at Table C.4.

<sup>171</sup> CR/PR at 2.7.

<sup>172</sup> CR/PR at Table 2.6.

<sup>173</sup> CR/PR at Table C.4.

<sup>174</sup> *Calculated from* CR/PR at Table C.4. Nonsubject imports consist of fresh winter strawberries from nonsubject countries and fresh non-winter strawberries from all import sources. *Id.*

<sup>175</sup> *Calculated from* CR/PR at Table C.4.

<sup>176</sup> CR/PR at 2.6.

<sup>177</sup> CR/PR at 2.10. Reduced availability of strawberries from different sources during certain times of the year may limit substitutability to some extent. Fifteen of 25 responding domestic producers reported that fresh winter strawberries from Mexico are only sometimes interchangeable with fresh (Continued...)

imports from April through October is limited, given the scope of subject merchandise only covers strawberries harvested or entered from November 1 through March 31. However, for fresh strawberries for the frozen market, this would not be the case.

The large majority of responding domestic producers reported that differences other than price are never or only sometimes significant between domestically grown fresh winter strawberries and subject imports.<sup>178</sup> A bare majority of responding importers reported that differences other than price were always or frequently significant between domestic fresh winter strawberries and subject imports.<sup>179</sup> The two responding U.S. purchasers each ranked quality and on-time service within the top three purchasing factors; only one ranked price within the top three purchasing factors, behind quality and volume.<sup>180</sup> Given the limited record evidence on the importance of price in purchasing decisions, we cannot find that price is not an important factor.

During the POI, domestic producers and U.S. importers primarily sold fresh winter strawberries through short-term contracts and spot sales, with a minority of sales involving annual and long-term contracts.<sup>181</sup> Firms reported setting prices using transaction-by-transaction negotiations, contracts, set price lists, and other methods.<sup>182</sup>

The primary raw materials (*i.e.*, non-labor growing costs) used in the production of strawberries include soil, water, chemicals, and other growing inputs such as seedlings,

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winter strawberries grown in the United States, while the remaining ten producers reported that the products are always or frequently interchangeable. *Id.* at Table 2.9. Eight of 11 importers reported that subject imports are always or frequently interchangeable with domestically grown fresh winter strawberries, while the remaining three importers reported that the products are only sometimes interchangeable. *Id.* at Table 2.10.

<sup>178</sup> CR/PR at Table 2.11. Eight producers reported that differences other than price between domestic fresh winter strawberries and subject imports are never significant, 16 reported that differences other than price are only sometimes significant, and three reported that differences other than price are always significant. *Id.*

<sup>179</sup> CR/PR at Table 2.12. Five importers reported that differences other than price between domestic fresh winter strawberries and subject imports are always significant, one reported that differences other than price are frequently significant, and five reported that differences other than price are only sometimes significant. *Id.*

<sup>180</sup> CR/PR at Table 2.8; \*\*\*'s Lost Sales and Lost Revenue Survey at 5.

<sup>181</sup> CR/PR at Table 5.2. Most domestic producers and at least half of responding U.S. importers fix price and quantity for contracts of any length. *Id.* at 5.2. Most domestic producers reported that they do not allow price renegotiation, but at least half of U.S. importers reported that they do allow price renegotiation. *Id.* Domestic producers typically quote prices on a delivered basis, while importers typically quote prices on an f.o.b. basis. *Id.* Additionally, most firms reported that they do not offer discounts. *Id.*

<sup>182</sup> CR/PR at Table 5.1.

fertilizers, and mulch.<sup>183</sup> Raw material costs represent the largest component of the domestic industry's COGS, and their share of COGS increased from \*\*\* percent in 2022 to \*\*\* percent in 2024.<sup>184</sup> Most domestic producers reported that they do not index prices to raw materials, while most importers reported indexing prices to raw materials in annual and long-term contracts, but not short-term contracts.<sup>185</sup>

As discussed above in section IV.A.2., while we do not define a regional industry, we take into account as a condition of competition that while fresh strawberries are frequently shipped over 1,000 miles from their point of production, particularly by California producers, the Florida producers ship most of their production of fresh strawberries to states east of the Mississippi River, Texas, or Louisiana.

### C. Volume of Subject Imports

Section 771(7)(C)(i) of the Tariff Act provides that the "Commission shall consider whether the volume of imports of the merchandise, or any increase in that volume, either in absolute terms or relative to production or consumption in the United States, is significant."<sup>186</sup>

The volume of subject imports decreased from 421.1 million pounds in 2022 to 401.3 million pounds in 2023, and then increased to 468.4 million pounds in 2024, for an overall increase of 11.2 percent from 2022 to 2024.<sup>187</sup> Subject imports of 323.0 million pounds in interim 2025 were 4.7 percent lower than the 338.8 million pounds in interim 2024.<sup>188</sup> Subject imports' share of apparent U.S. consumption decreased from \*\*\* percent in 2022 to \*\*\* percent in 2023, and then increased to \*\*\* percent in 2024, for an overall decrease of \*\*\* percentage points from 2022 to 2024.<sup>189</sup> Subject imports' \*\*\* percent share of apparent U.S. consumption by value in interim 2025 was \*\*\* percentage points lower than their \*\*\* percent share in interim 2024.<sup>190</sup>

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<sup>183</sup> CR/PR at 6.14.

<sup>184</sup> CR/PR at Table E.26. Raw materials' share of COGS was \*\*\* percent in interim 2025, compared to \*\*\* percent in interim 2024. *Id.*

<sup>185</sup> CR/PR at 5.2. Effective March 4, 2025, fresh strawberries from Mexico became subject to an additional 25 percent ad valorem duty under the International Emergency Economic Powers Act ("IEEPA"). CR/PR at 1.8. Effective March 7, 2025, strawberries that qualified for duty-free treatment under the United States-Mexico-Canada Agreement were not subject to the additional duty under IEEPA. *Id.* Effective February 20, 2026, tariffs initiated under IEEPA and the associated duties imposed under IEEPA were terminated. Exec. Order No. 14389, 91 Fed. Reg. 9437 (Feb. 25, 2026).

<sup>186</sup> 19 U.S.C. § 1677(7)(C)(i).

<sup>187</sup> CR/PR at Table C.4.

<sup>188</sup> CR/PR at Table C.4.

<sup>189</sup> CR/PR at Table C.4.

<sup>190</sup> CR/PR at Table C.4.

Based on the record in the preliminary phase of these investigations, we find that the volume of subject imports is significant both in absolute terms and relative to U.S. consumption.

#### **D. Price Effects of the Subject Imports**

Section 771(7)(C)(ii) of the Tariff Act provides that, in evaluating the price effects of subject imports, the Commission shall consider whether –

- (I) there has been significant price underselling by the imported merchandise as compared with the price of domestic like products of the United States, and
- (II) the effect of imports of such merchandise otherwise depresses prices to a significant degree or prevents price increases, which otherwise would have occurred, to a significant degree.<sup>191</sup>

As discussed above, we find that there is a high degree of substitutability between subject imports and domestically produced fresh strawberries during the period in which subject imports are present in the market, November 1 to approximately March 31, and we cannot conclude that price is not an important factor in purchasing decisions.

The Commission collected monthly pricing data from the U.S. producers and importers for two pricing products shipped to unrelated customers during the POI.<sup>192</sup> Eleven domestic producers and ten U.S. importers provided usable pricing data for sales of the requested products, although not all firms reported pricing for all products for all months.<sup>193</sup> Pricing data reported by these firms accounted for 69.2 percent of U.S. shipments of domestically produced

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<sup>191</sup> 19 U.S.C. § 1677(7)(C)(ii).

<sup>192</sup> The two pricing products are as follows:

**Product 1.**-- Non-organic flat-pack conventional (8-1 lb) fresh winter strawberry, sold to distributors per pound

**Product 2.**-- Non-organic flat-pack conventional (8-1 lb) fresh winter strawberry, sold to retailers, grocery stores, and other end users (e.g., food processors) per pound

CR/PR at 5.5.

We note that, based on the scope, the questionnaires in this preliminary phase investigation collected pricing information with respect to fresh winter strawberries only. In any final phase investigation, we will seek pricing data for all fresh strawberries as well.

<sup>193</sup> CR/PR at 5.5.

fresh winter strawberries nationwide and 43.2 percent of U.S. shipments of subject imports nationwide in 2024.<sup>194</sup>

Subject imports undersold domestically grown strawberries nationwide in 14 of 51 (or 27.5 percent of) monthly comparisons, at margins ranging from \*\*\* to \*\*\* percent and averaging \*\*\* percent.<sup>195</sup> There were \*\*\* pounds of subject import sales nationwide in months with underselling, equal to \*\*\* percent of the total volume of reported nationwide sales of subject imports covered by the Commission's pricing data during the POI.<sup>196</sup> Subject imports oversold domestically grown strawberries nationwide in 37 of 51 (or 72.5 percent of) monthly comparisons, at margins ranging from \*\*\* to \*\*\* percent and averaging \*\*\* percent.<sup>197</sup> There were \*\*\* pounds of subject import sales in months with overselling, equal to \*\*\* percent of the total volume of reported sales of subject imports.<sup>198</sup>

We have also considered purchasers' responses to the Commission's lost sales/lost revenue survey. Commission staff contacted 15 purchasers identified by domestic producers and received responses to the lost sales/lost revenue survey from two firms, who reported purchasing or importing \*\*\* pounds of fresh winter strawberries during the POI, including \*\*\* pounds of subject imports.<sup>199</sup> One of the two responding purchasers reported that it had

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<sup>194</sup> CR/PR at 5.5.

<sup>195</sup> CR/PR at Table 5.14. Subject imports also undersold domestically grown strawberries within-region in 14 of 51 (or 27.5 percent of) monthly comparisons, at margins ranging from \*\*\* to \*\*\* percent and averaging \*\*\* percent. *Id.* at Table 5.13.

<sup>196</sup> CR/PR at Table 5.14. There were \*\*\* pounds of subject import sales within-region in months with underselling, equal to \*\*\* percent of the total volume of reported within-region sales of subject imports covered by the Commission's pricing data during the POI. *Id.* at Table 5.13.

On an annual basis, subject imports undersold domestically grown strawberries nationwide in 5 of 14 monthly comparisons (35.7 percent) in 2022, 4 of 15 monthly comparisons (26.7 percent) in 2023, 1 of 14 monthly comparisons (7.1 percent) in 2024, and 4 of 8 monthly comparisons (50.0 percent) in interim 2025. *Id.* at Table 5.16. There were \*\*\* pounds of subject import sales (\*\*\* percent of total volume) in months of underselling during 2022, \*\*\* pounds of subject import sales (\*\*\* percent of total volume) in months of underselling during 2023, \*\*\* pounds of subject import sales (\*\*\* percent of total volume) in months of underselling during 2024, and \*\*\* pounds of subject import sales (\*\*\* percent of total volume) in months of underselling during interim 2025. *Id.* Underselling decreased from 2022 to 2024, and then increased sharply in interim 2025. *Id.*

<sup>197</sup> CR/PR at Table 5.14. Subject imports also oversold domestically grown strawberries within-region in 37 of 51 (or 72.5 percent of) monthly comparisons, at margins ranging from \*\*\* to \*\*\* percent and averaging \*\*\* percent. *Id.* at Table 5.13.

<sup>198</sup> CR/PR at Table 5.14. There were \*\*\* pounds of subject import sales within-region in months with overselling, equal to \*\*\* percent of the total volume of reported within-region sales of subject imports covered by the Commission's pricing data during the POI. *Id.* at Table 5.13.

<sup>199</sup> CR/PR at 5.34, Table 5.17.

purchased subject imports instead of domestically grown strawberries during the POI.<sup>200</sup> That purchaser reported that the price of subject imports was lower than the price of the domestic product, but also reported that price was not a primary reason for its decision to purchase \*\*\* pounds of subject imports rather than the domestic like product.<sup>201</sup>

We have also examined whether subject imports depressed or suppressed domestic prices. In terms of price trends during the POI, domestic and subject import prices experienced similar trends nationally for both pricing products. Prices generally increased from October to December and then decreased through the end of spring, with prices ending lower than they were in October.<sup>202</sup> Neither responding purchaser reported that domestic producers reduced prices to compete with lower-priced subject imports during the POI.<sup>203</sup>

As previously discussed, apparent U.S. consumption increased steadily from 2022 to 2024 and was higher in interim 2025 compared to interim 2024, and most firms agree that demand increased over the POI. The domestic producers' ratio of COGS to net sales increased by \*\*\* percentage points from \*\*\* percent in 2022 to \*\*\* percent in 2023, and by \*\*\* percentage points to \*\*\* percent in 2024, for an overall increase of \*\*\* percentage point; their ratio of COGS to net sales of \*\*\* percent in interim 2025 was \*\*\* percentage points higher than the ratio of \*\*\* percent in interim 2024.<sup>204</sup> The domestic producers' total net sales AUVs increased by \$\*\*\* per pound (\*\*\* percent) between 2022 and 2024, increasing by \$\*\*\* per

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<sup>200</sup> CR/PR at 5.35, Table 5.18.

<sup>201</sup> CR/PR at 5.35, Table 5.18. The purchaser did not specify its reason for importing or purchasing subject merchandise instead of the domestic product during the POI. See \*\*\*'s Lost Sales and Lost Revenue Survey at 3(c).

<sup>202</sup> CR/PR at Tables 5.6–5.7, Figures 5.6–5.7. Domestic and subject import prices followed similar trends within-region as well. See *id.* at Tables 5.4–5.5, Figures 5.3 & 5.5.

Domestic prices nationally increased by \*\*\* percent for product 1 and decreased by \*\*\* percent for product 2 between the beginning of the POI to April 2025, the last month with domestic prices reported for each product. *Id.* at Table 5.11, Figure 5.8. Subject import prices for products 1 and 2 decreased by \*\*\* and \*\*\* percent, respectively, from the beginning of the POI through June 2025, the last month with subject import prices reported for each product. *Id.* at Table 5.12, Figure 5.9.

We note that the indexed average U.S. city prices (reported by the U.S. Bureau of Labor Statistics) of all fresh strawberries were generally higher at the beginning of the POI compared to the end of the period for most months. See *id.* at Table 5.3, Figure 5.1. We intend to examine these price trends further in any final phase of the investigations.

We also note that the within-region pricing data show that, for each winter season, domestic product prices started out higher than subject and nonsubject Mexican import prices, and then fell over the course of the season, although this trend does not appear to exhibit itself when strawberries are considered with the inclusion of sales by out-of-region U.S. producers or on a nationwide basis. See *id.* at Tables 5.4–5.7, Figures 5.2–5.7.

<sup>203</sup> CR/PR at 5.35.

<sup>204</sup> CR/PR at Tables E.26 & C.4.

pound (\*\*\*) percent) from 2022 to 2023 and decreasing by \$\*\*\* per pound (\*\*\*) percent) from 2023 to 2024; their net sales AUV in interim 2025 was \*\*\* percent higher than the net sales AUV in interim 2024.<sup>205</sup> The domestic producers' unit COGS increased from 2022 to 2024, increasing by \$\*\*\* per pound (\*\*\*) percent) from 2022 to 2023 and decreasing by \$\*\*\* per pound (\*\*\*) percent) from 2023 to 2024, for an overall increase of \$\*\*\* per pound (\*\*\*) percent); their unit COGS of \$\*\*\* per pound in interim 2025 were \*\*\* percent higher than the \$\*\*\* per pound in interim 2024.<sup>206</sup> On a unit basis, between 2022 and 2024, the increase in unit COGS (\$\*\*\* per pound) exceeded the increase in the net sales AUV (\$\*\*\* per pound).<sup>207</sup> On a percentage basis, in 2023 net sales AUV rose by less than unit COGS, in 2024 net sales AUV fell by more than unit COGS, and from 2022 to 2024 and between interim periods net sales AUV rose by less than unit COGS.<sup>208</sup>

While the increase in the industry's COGS to net sales ratio is small, in light of increasing demand and consumption, the high degree of substitutability, and that we cannot find price is not an important purchasing factor, the record does not offer another explanation besides subject imports for the inability of the domestic industry's net sales AUVs to keep pace with its rising COGS.<sup>209</sup> While this increase may not be sufficient for a finding of significant price suppression in a final investigation, under the legal standard in a preliminary investigation, and without the more developed evidentiary record we would obtain in a final investigation, we cannot conclude by clear and convincing evidence that subject imports did not suppress prices for the domestic like product to a significant degree during the POI. Consequently, we cannot conclude that subject imports did not have significant price effects on the domestic industry during the POI.

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<sup>205</sup> CR/PR at Tables E.26, E.27 & C.4.

<sup>206</sup> CR/PR at Tables E.26, E.27 & C.4.

<sup>207</sup> CR/PR at Tables E.27 & C.4.

<sup>208</sup> CR/PR at Tables E.27 & C.4.

<sup>209</sup> We note, however, that U.S. producers' production and shipments increased by more than domestic consumption from 2022 to 2024 and over the interim periods, and that the increase in U.S. production and shipments in all periods greatly exceeded the increase (if any) in subject imports, while preliminary price comparisons suggest that the domestic products were in most instances priced lower than subject imports. CR/PR at Tables 5.16 & C.4. In any final phase, we will investigate the relative roles of intra-industry competition (or competition between regional industries), subject imports, and nonsubject imports (including non-winter imports from Mexico) on U.S. prices.

## E. Impact of the Subject Imports<sup>210</sup>

Section 771(7)(C)(iii) of the Tariff Act provides that the Commission, in examining the impact of the subject imports on the domestic industry, “shall evaluate all relevant economic factors which have a bearing on the state of the industry.” These factors include output, sales, inventories, capacity utilization, market share, employment, wages, productivity, gross profits, net profits, operating profits, cash flow, return on investment, return on capital, ability to raise capital, ability to service debt, research and development, and factors affecting domestic prices. No single factor is dispositive, and all relevant factors are considered “within the context of the business cycle and conditions of competition that are distinctive to the affected industry.”<sup>211</sup>

The domestic industry’s output indicia generally increased over the POI. Its production and U.S. shipments increased from 2022 to 2024 and were higher in interim 2025 than in interim 2024.<sup>212</sup> According to USDA data, acres planted and harvested and yield per acre also increased from 2022 to 2024.<sup>213</sup>

The domestic industry’s employment indicia also increased over the POI. Its total hours worked, wages paid, hourly wages, and productivity increased from 2022 to 2024 and were higher in interim 2025 compared to interim 2024.<sup>214</sup> The number of production and related workers (“PRWs”) and unit labor costs both increased between 2022 and 2024, but were lower

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<sup>210</sup> Commerce initiated an antidumping duty investigation for subject imports from Mexico based on an estimated dumping margin of 18.32 percent. *Notice of Initiation*, 91 Fed. Reg. at 6825.

<sup>211</sup> 19 U.S.C. § 1677(7)(C)(iii).

<sup>212</sup> CR/PR at Table C.4. The domestic industry’s production of strawberries remained at \*\*\* pounds in 2022 and 2023, then increased to \*\*\* pounds in 2024; its production of \*\*\* pounds in interim 2025 was higher than the \*\*\* pounds produced in interim 2024. *Id.* Its U.S. shipments decreased from \*\*\* pounds in 2022 to \*\*\* pounds in 2023 and then increased to \*\*\* pounds in 2024; its U.S. shipments of \*\*\* pounds in interim 2025 were higher than the \*\*\* pounds shipped in interim 2024. *Id.*

<sup>213</sup> CR/PR at Table 3.10.

<sup>214</sup> CR/PR at Tables E.11 & C.4. Total hours worked increased from \*\*\* in 2022 to \*\*\* in 2023 and then decreased to \*\*\* in 2024, for an overall increase; hours worked were \*\*\* in both interim periods. *Id.* Wages paid increased from \$\*\*\* in 2022 to \$\*\*\* in 2023 and \$\*\*\* in 2024; the \$\*\*\* in wages paid in interim 2025 was higher than the \$\*\*\* in wages paid in interim 2024. *Id.* The domestic industry’s hourly wages increased from \$\*\*\* in 2022 to \$\*\*\* in 2023 and \$\*\*\* in 2024; its hourly wages of \$\*\*\* in interim 2025 were higher than the \$\*\*\* in interim 2024. *Id.* Its productivity decreased from \*\*\* pounds per hour in 2022 to \*\*\* pound per hour in 2023 and then increased to \*\*\* pounds per hour in 2024, for an overall increase; productivity of \*\*\* pound per hour in interim 2025 were higher than the productivity of \*\*\* pounds per hour in interim 2024. *Id.*

in interim 2025 compared to interim 2024.<sup>215</sup> The hours worked per PRW decreased from 2022 to 2024, but was higher in interim 2025 than in interim 2024.<sup>216</sup>

The domestic industry's financial performance was mixed during the POI, despite increased apparent consumption. Its net sales value and gross profits increased from 2022 to 2024 and were higher in interim 2025 compared to interim 2024.<sup>217</sup> The industry's operating and net income declined from 2022 to 2024; its operating income was higher and net income lower in interim 2025 compared to interim 2024.<sup>218</sup> Similarly, the domestic industry's operating and net income margins declined from 2022 to 2024; its operating margin in interim 2025 was lower than in interim 2024, while its net income margin was the same in both interim periods.<sup>219</sup> Its capital expenditures decreased from 2022 to 2024, but were higher in interim 2025 than in interim 2024.<sup>220</sup> Its R&D expenses increased from 2022 to 2024, but were lower in

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<sup>215</sup> CR/PR at Tables E.11 & C.4. The domestic industry's number of PRWs increased from \*\*\* in 2022 to \*\*\* in 2023 and \*\*\* in 2024; the \*\*\* PRWs employed in interim 2025 were fewer than the \*\*\* PRWs in interim 2024. *Id.* Its unit labor costs increased from \$\*\*\* per pound in 2022 to \$\*\*\* per pound in 2023 and then decreased to \$\*\*\* per pound in 2024, for an overall increase; its unit labor costs of \$\*\*\* per pound in interim 2025 were lower than the \$\*\*\* per pound in interim 2024. *Id.*

<sup>216</sup> CR/PR at Table E.11. The domestic industry's hours worked per PRW increased from \*\*\* in 2022 to \*\*\* in 2023 and then decreased to \*\*\* in 2024, for an overall decrease; the \*\*\* hours worked per PRW during interim 2025 was higher than the \*\*\* hours worked per PRW in interim 2024. *Id.*

<sup>217</sup> CR/PR at Tables E.26 & C.4. The domestic industry's net sales value increased from \$\*\*\* in 2022 to \$\*\*\* in 2023 and \$\*\*\* in 2024, for an overall increase of \*\*\* percent; its net sales of \$\*\*\* in interim 2025 were \*\*\* percent higher than the \$\*\*\* in interim 2024. *Id.* Its gross profit increased from \$\*\*\* in 2022 to \$\*\*\* in 2023 and \$\*\*\* in 2024, for an overall increase of \*\*\* percent; its gross profit of \$\*\*\* in interim 2025 was \*\*\* percent higher than the \$\*\*\* in interim 2024. *Id.*

<sup>218</sup> CR/PR at Tables E.26 & C.4. Its operating income decreased from \$\*\*\* in 2022 to \$\*\*\* in 2023 and \$\*\*\* in 2024, for an overall decrease of \*\*\* percent; its operating income of \$\*\*\* in interim 2025 was \*\*\* percent higher than the \$\*\*\* in interim 2024. *Id.* Its net income decreased from \$\*\*\* in 2022 to \$\*\*\* in 2023 and \$\*\*\* in 2024, for an overall decrease of \*\*\* percent; its net income of \$\*\*\* in interim 2025 was \*\*\* percent lower than the \$\*\*\* in interim 2024. *Id.*

<sup>219</sup> CR/PR at Tables E.26 & C.4. The domestic industry's operating income as a ratio to net sales decreased from \*\*\* percent in 2022 to \*\*\* percent in 2023 and \*\*\* percent in 2024, for an overall decrease of \*\*\* percentage points; its operating income margin of \*\*\* percent in interim 2025 was \*\*\* percentage points lower than its margin of \*\*\* percent in interim 2024. *Id.* Its net income as a ratio to net sales decreased from \*\*\* percent in 2022 to \*\*\* percent in 2023 and \*\*\* percent in 2024, for an overall decrease of \*\*\* percentage points; its net income margin was \*\*\* percent in both interim periods. *Id.*

<sup>220</sup> CR/PR at Tables E.29 & C.4. The domestic industry's capital expenditures increased from \$\*\*\* in 2022 to \$\*\*\* in 2023 and then decreased to \$\*\*\* in 2024, for an overall decrease; its capital expenditures of \$\*\*\* in interim 2025 were higher than the \$\*\*\* in interim 2024. *Id.*

interim 2025 compared to interim 2024.<sup>221</sup> The domestic industry's total assets increased from 2022 to 2024, but its operating return on assets ("ROA") decreased during that period.<sup>222</sup>

Based on the record in the preliminary phase of these investigations, we have found that the volume of subject imports was significant, both in absolute terms and relative to U.S. consumption, and we cannot conclude that subject imports did not suppress domestic prices to a significant degree during the POI. In light of these considerations, we cannot conclude that subject imports did not have a significant adverse impact on the domestic industry.

We have also considered whether there are other factors, such as nonsubject imports, that may have had an impact on the domestic industry, to ensure that we are not attributing injury from such other factors to cumulated subject imports. Nonsubject imports' market share increased from 2022 to 2023 but declined in 2024, resulting in an overall decline between 2022 and 2024; their market share was higher in interim 2025 than in interim 2024.<sup>223</sup> The volume and market share of nonsubject imports of fresh winter strawberries were quite low, and their AUVs were greater than both subject merchandise and U.S. shipments of the domestic like product.<sup>224</sup> The AUVs of nonsubject imports of fresh non-winter strawberries were lower than the AUVs of the domestic like product and subject merchandise in 2022 through 2024 and both

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<sup>221</sup> CR/PR at Tables E.29 & C.4. The domestic industry's R&D expenses increased from \$\*\*\* in 2022 to \$\*\*\* in 2023 and \$\*\*\* in 2024; its R&D expenses of \$\*\*\* in interim 2025 were lower than the \$\*\*\* in interim 2024. *Id.*

<sup>222</sup> CR/PR at Tables E.29 & C.4. The domestic industry's total net assets increased from \$\*\*\* 2022 to \$\*\*\* in 2023 and \$\*\*\* in 2024. *Id.* Its ROA decreased from \*\*\* percent in 2022 to \*\*\* percent in 2023 and \*\*\* percent in 2024. *Id.* at Table E.29.

<sup>223</sup> Nonsubject imports' share of apparent U.S. consumption increased from \*\*\* percent in 2022 to \*\*\* percent in 2023 and then decreased to \*\*\* percent in 2024, for an overall decrease of \*\*\* percentage points; their \*\*\* percent share of apparent U.S. consumption in interim 2025 was \*\*\* percentage points higher than their share of \*\*\* percent in interim 2024. *Calculated from CR/PR at Table C.4.* As previously discussed, nonsubject imports consist of fresh winter strawberries from nonsubject countries and fresh non-winter strawberries from all import sources, including Mexico. *Id.*

<sup>224</sup> The volume of nonsubject imports of fresh winter strawberries increased from \*\*\* pounds in 2022 to \*\*\* pounds in 2023 and \*\*\* pounds in 2024; the volume of \*\*\* pounds in interim 2025 was lower than the \*\*\* pounds in interim 2024. CR/PR at Table C.4. Their share of apparent U.S. consumption increased from \*\*\* percent in 2022 to \*\*\* percent in 2023 and then decreased to \*\*\* percent in 2024, for no change overall; their \*\*\* percent share of apparent U.S. consumption in interim 2025 was lower than their share of \*\*\* percent in interim 2024. *Id.*

The AUV of nonsubject imports of fresh winter strawberries was \$\*\*\* per pound in 2022, \$\*\*\* per pound in 2023, and \$\*\*\* per pound in 2024; their AUV was \$\*\*\* per pound in interim 2025 compared to \$\*\*\* per pound in interim 2024. *Id.* By comparison, the AUV of subject imports was \$\*\*\* per pound in 2022, \$\*\*\* per pound in 2023, and \$\*\*\* per pound in 2024; their AUV was \$\*\*\* per pound in interim 2025 compared to \$\*\*\* per pound in interim 2024. *Id.* The AUV of U.S. shipments of the domestic like product was \$\*\*\* per pound in 2022, \$\*\*\* per pound in 2023, and \$\*\*\* per pound in 2024; their AUV was \$\*\*\* per pound in interim 2025 compared to \$\*\*\* per pound in interim 2024

interim periods.<sup>225</sup> Based on the record in this preliminary investigation, we cannot conclude that nonsubject imports were responsible for injury that we have concluded may be attributable to subject imports, for purposes of this preliminary determination. In any final phase of the investigation, we intend to investigate further the effect of nonsubject imports on the domestic industry, as well as the effects of supply constraints, such as those caused by weather events and crop disease, and differences in selling channels and mechanisms among firms.<sup>226</sup>

## **VI. Conclusion**

For the reasons stated above, we determine that there is a reasonable indication that an industry in the United States is materially injured by reason of imports of fresh winter strawberries from Mexico that are allegedly sold in the United States at LTFV.

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<sup>225</sup> The AUV of nonsubject imports of fresh non-winter strawberries was \$\*\*\* per pound in 2022, \$\*\*\* per pound in 2023, and \$\*\*\* per pound in 2024; their AUV was \$\*\*\* per pound in interim 2025 compared to \$\*\*\* per pound in interim 2024. CR/PR at Table C.4.

<sup>226</sup> According to respondents, the prices of strawberries sold pursuant to “programs” between producers and retailers are more stable than the prices of strawberries sold on the spot market. *See, e.g.*, CR/PR at 1.12.



# Part 1: Introduction

## Background

This investigation results from a petition filed with the U.S. Department of Commerce (“Commerce”) and the U.S. International Trade Commission (“USITC” or “Commission”) by the Strawberry Growers for Fair Trade,<sup>1</sup> on December 31, 2025, alleging that an industry<sup>2</sup> in the United States is materially injured and threatened with material injury by reason of less-than-fair-value (“LTFV”) imports of fresh winter strawberries (“FWS”)<sup>3</sup> from Mexico. Table 1.1 presents information relating to the background of this investigation.<sup>4 5</sup>

**Table 1.1 Fresh Winter Strawberries: Information relating to the background and schedule of this proceeding**

Effective date	Action
December 31, 2025	Petition filed with Commerce and the Commission; institution of the Commission investigations (91 FR 380, January 6, 2026)
January 21, 2026	Commission’s conference
February 9, 2026	Commerce’s notice of initiation (91 FR 6822, February 13, 2026)
February 27, 2026	Commission’s vote
March 10, 2026	Commission’s determination
March 13, 2026	Commission’s views

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<sup>1</sup> The Strawberry Growers for Fair Trade consists of the following entities: Astin Strawberry Exchange (Plant City, Florida); BBI Produce, Inc. dba Berry Boss (Dover, Florida); Florida Department of Agriculture and Consumer Services (Tallahassee, Florida); Grimes Produce Company (Plant City, Florida); Mathis Farms (Plant City, Florida); Simmons Farms, Inc. (Plant City, Florida); Sizemore Farms, Inc. (Plant City, Florida); Sweet Life Farms (Plant City, Florida); Ultra Farms (Wimauma, Florida); and the Florida Strawberry Growers Association (Dover, Florida).

<sup>2</sup> Petitioner further alleges this petition is filed on behalf of the regional U.S. industry that produces the domestic like product consisting of producers in Alabama, Connecticut, Delaware, Florida, Georgia, Louisiana, Illinois, Indiana, Kentucky, Maine, Maryland, Massachusetts, Michigan, Mississippi, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Tennessee, Texas, Vermont, Virginia, West Virginia, and Wisconsin. Producer location and import and shipment destinations included in the petitioner’s regional industry definition are referred to throughout this report as “within region,” while producer location and import and shipment destinations not included in the petitioner’s regional definition are referred to throughout this report as “out-of-region.”

<sup>3</sup> See the section entitled “The subject merchandise” in Part 1 of this report for a complete description of the merchandise subject in this proceeding.

<sup>4</sup> Pertinent Federal Register notices are referenced in appendix A and may be found at the Commission’s website ([www.usitc.gov](http://www.usitc.gov)).

<sup>5</sup> A list of witnesses appearing at the conference is presented in appendix B of this report.

## Statutory criteria

Section 771(7)(B) of the Tariff Act of 1930 (the “Act”) (19 U.S.C. § 1677(7)(B)) provides that in making its determinations of injury to an industry in the United States, the Commission—

shall consider (I) the volume of imports of the subject merchandise, (II) the effect of imports of that merchandise on prices in the United States for domestic like products, and (III) the impact of imports of such merchandise on domestic producers of domestic like products, but only in the context of production operations within the United States; and. . . may consider such other economic factors as are relevant to the determination regarding whether there is material injury by reason of imports.

Section 771(7)(C) of the Act (19 U.S.C. § 1677(7)(C)) further provides that—<sup>6</sup>

In evaluating the volume of imports of merchandise, the Commission shall consider whether the volume of imports of the merchandise, or any increase in that volume, either in absolute terms or relative to production or consumption in the United States is significant. . . . In evaluating the effect of imports of such merchandise on prices, the Commission shall consider whether. . . (I) there has been significant price underselling by the imported merchandise as compared with the price of domestic like products of the United States, and (II) the effect of imports of such merchandise otherwise depresses prices to a significant degree or prevents price increases, which otherwise would have occurred, to a significant degree. . . . In examining the impact required to be considered under subparagraph (B)(i)(III), the Commission shall evaluate (within the context of the business cycle and conditions of competition that are distinctive to the affected industry) all relevant economic factors which have a bearing on the state of the industry in the United States, including, but not limited to. . . (I) actual and potential decline in output, sales, market share, gross profits, operating profits, net profits, ability to service debt, productivity, return on investments, return on assets, and utilization of capacity, (II) factors affecting domestic prices, (III) actual and potential negative effects on cash flow, inventories, employment, wages, growth, ability to raise capital, and investment, (IV) actual and potential negative effects on the existing development and production efforts of the domestic industry, including efforts to develop a derivative

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<sup>6</sup> Amended by PL 114—27 (as signed, June 29, 2015), Trade Preferences Extension Act of 2015.

or more advanced version of the domestic like product, and (V) in {an antidumping investigation}, the magnitude of the margin of dumping.

In addition, Section 771(7)(J) of the Act (19 U.S.C. § 1677(7)(J)) provides that—<sup>7</sup>

(J) EFFECT OF PROFITABILITY.—The Commission may not determine that there is no material injury or threat of material injury to an industry in the United States merely because that industry is profitable or because the performance of that industry has recently improved.

## **Organization of report**

Part 1 of this report presents information on the subject merchandise, alleged dumping margins, domestic like product, and information for the Commission’s regional industries analysis. Part 2 of this report presents information on conditions of competition and other relevant economic factors. Part 3 presents information on the condition of the within region and national U.S. industries, including data on acres planted and harvested, yields, production, shipments, inventories, and employment. Parts 4 and 5 present the volume of subject imports and pricing of domestic and imported products, respectively. Part 6 presents information on the financial experience of U.S. producers. Part 7 presents the statutory requirements and information obtained for use in the Commission’s consideration of the question of threat of material injury as well as information regarding nonsubject countries.

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<sup>7</sup> Amended by PL 114—27 (as signed, June 29, 2015), Trade Preferences Extension Act of 2015.

## Market summary

Fresh winter strawberries can be directly consumed or used in sweet and savory dishes or baked goods and other desserts. The leading U.S. producers of fresh winter strawberries within region include Driscoll's, Inc. ("Dirscoll's") (Florida); Astin Strawberry Exchange ("Astin"); Florida Pacific; Grimes; and Sweet Life. The leading U.S. producers of fresh winter strawberries nationally include Driscoll's (California); Driscoll's (Florida); Astin; Florida Pacific; Grimes; and Reiter Bros. Leading exporters from Mexico are Mainland Farms S.A. de C.V. ("Mainland Farms") and Driscoll's. The leading U.S. importers of fresh winter strawberries from Mexico are Driscoll's and Gem-Pack Berries, LLC ("Gem-Pack"). Leading importers from nonsubject countries (primarily Canada) include Mastronardi Produce Limited ("Mastronardi") and Mucci International Marketing, Inc. ("Mucci"). Responding U.S. purchasers of fresh winter strawberries are retailers; leading purchasers include retailers, particularly grocery stores.

Within region apparent U.S. consumption of fresh winter strawberries totaled approximately \*\*\* pounds (\$\*\*\*) in 2024.<sup>8</sup> Within region U.S. producers' U.S. shipments of fresh winter strawberries to destinations within region totaled \*\*\* pounds (\$\*\*\*) in 2024 and accounted for \*\*\* percent of within region apparent U.S. consumption by quantity and \*\*\* percent by value.<sup>9</sup> Out-of-region U.S. producers' U.S. shipments of fresh winter strawberries to destinations within region totaled \*\*\* pounds (\$\*\*\*) in 2024 and accounted for \*\*\* percent of within region apparent U.S. consumption by quantity and \*\*\* percent by value.<sup>10</sup> U.S. imports from Mexico to within region destinations totaled \*\*\* pounds (\$\*\*\*) in 2024 and accounted for \*\*\* percent of within region apparent U.S. consumption by quantity and \*\*\* percent by value.<sup>11</sup> U.S. imports from nonsubject sources to within region destinations totaled \*\*\*

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<sup>8</sup> National apparent U.S. consumption of fresh winter strawberries totaled approximately \*\*\* pounds (\$\*\*\*) in 2024.

<sup>9</sup> Within region U.S. producers' U.S. shipments of fresh winter strawberries to all domestic destinations totaled \*\*\* pounds (\$\*\*\*) in 2024 and accounted for \*\*\* percent of national apparent U.S. consumption by quantity and \*\*\* percent by value.

<sup>10</sup> Out-of-region U.S. producers' U.S. shipments of fresh winter strawberries to all domestic destinations totaled \*\*\* pounds (\$\*\*\*) in 2024 and accounted for \*\*\* percent of national apparent U.S. consumption by quantity and \*\*\* percent by value.

<sup>11</sup> U.S. imports from Mexico nationally totaled \*\*\* pounds (\$\*\*\*) in 2024 and accounted for \*\*\* percent of national apparent U.S. consumption by quantity and \*\*\* percent by value.

pounds (\$\*\*\*) in 2024 and accounted for \*\*\* percent of within region apparent U.S. consumption by quantity and \*\*\* percent by value.<sup>12</sup>

## Summary data and data sources

A summary of data collected in this investigation is presented in appendix C, tables C.1 (FWS, within region), C.2 (FWS, national), C.3 (all strawberries, within region), and C.4 (all strawberries, national). Related parties exclusion tables are also presented at tables C.5 through C.8. The Commission's questionnaires collected data for the years 2022 to 2024 and interim periods January through September 2024 ("interim 2024") and January through September 2025 ("interim 2025"). Except as noted, U.S. industry data are based on questionnaire responses of 38 firms estimated to account for 47.5 percent of U.S. national production of fresh strawberries (winter and non-winter) during 2024. U.S. imports are based on official import statistics and adjusted official import statistics.<sup>13</sup>

## Previous and related investigations

Strawberries have not been the subject of any prior countervailing and/or antidumping duty investigations in the United States; however, the Commission monitored imports of fresh strawberries from December 2020 through November 2022 pursuant to Section 332 of the Tariff Act at the request of the United States Trade Representative following an October 2020 request from several associations, including the Florida Strawberry Growers Association, a member of the petitioning entity in this proceeding (Investigation No. 332-581).

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<sup>12</sup> U.S. imports from nonsubject sources nationally totaled 5.5 million pounds (\$18.0 million) in 2024 and accounted for 0.6 percent of national apparent U.S. consumption by quantity and 0.9 percent by value.

<sup>13</sup> National U.S. imports are based on official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.4020, 0810.10.4040, 0810.10.4060, and 0810.10.4080, as well as 0810.10.4010 and 0810.10.4090, limited to October through March. Within region U.S. import figures are also based on official U.S. import statistics using these HTS numbers but have been further adjusted to report only within region imports by using responses to the Commission's U.S. importers' questionnaire.

## Nature and extent of alleged sales at LTFV

### Alleged sales at LTFV

On February 13, 2026, Commerce published a notice in the Federal Register of the initiation of its antidumping duty investigation on fresh winter strawberries from Mexico.<sup>14</sup> Commerce has initiated its antidumping duty investigation based on estimated dumping margin of 18.32 percent for fresh winter strawberries from Mexico.

### The subject merchandise

#### Commerce's scope

In the current proceeding, Commerce has defined the scope as follows:<sup>15 16</sup>

The merchandise covered by this investigation is all fresh and chilled winter strawberries (winter strawberries) from Mexico harvested or entered during the period November 1 through March 31.

Winter strawberries may be stemmed or de-stemmed, whole or sliced, imported in bulk or loose form, or may be imported in individual containers packaged for retail sale. The scope of this investigation includes all winter strawberries, whether or not organic, regardless of production method, and irrespective of color, grade, shape, size, or packaging. Subject merchandise may be cleaned, coated (including chocolate covered or other coated confectionary items), washed, waxed, inspected, subjected to metal detection, and/or vacuum cooled prior to importation, including winter strawberries that undergo further processing in a third country.

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<sup>14</sup> 91 FR 6822, February 13, 2026.

<sup>15</sup> 91 FR 6822, February 13, 2026.

<sup>16</sup> The petition defined the scope as covering all fresh and chilled winter strawberries from Mexico harvested or entered during the period October 1 through March 31, whereas the scope defined by Commerce defines the winter period as November 1 through March 31. Data presented in this report uses the petition winter period scope definition of October 1 through March 31.

## Tariff treatment

Based upon the scope set forth by Commerce, information available to the Commission indicates that the merchandise subject to this investigation are currently imported under Harmonized Tariff Schedule of the United States (“HTS”) statistical reporting numbers 0810.10.4020, 0810.10.4040, 0810.10.4060, and 0810.10.4080, and prior to 2024, 0810.10.4010 and 0810.10.4090. The general rate of duty is 1.1 cents/kilogram for HTS subheading 0810.10.40.<sup>17</sup> Decisions on the tariff classification and treatment of imported goods are within the authority of U.S. Customs and Border Protection.

Pursuant to the United States-Mexico-Canada Agreement (“USMCA”), originating goods of Mexico under HTS general note 11 (i.e., those grown, cultivated, harvested, picked or gathered in the territory of Mexico, even if grown from seed, bulbs, rootstock, cuttings, slips or other live parts of plants imported from a non-USMCA country) are eligible for duty-free entry.<sup>18</sup>

Below is a summary of additional tariffs applied to fresh winter strawberries. See table 1.2 for a summary of additional tariffs in place as of February 13, 2026.

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<sup>17</sup> USITC, HTS (2026) Revision 3, Publication 5705, February 2026, pp. 8.14; USITC, HTS (2023) Revision 11, Publication 5462, September 2023, pp. 8.13

<sup>18</sup> See HTS general note 11 subdivisions (a)(i) and (b) for more details on duty treatment for goods originating from the territory of a USMCA country, accompanied by definitions provided in subdivisions (l)(iv)(2) and (n)(iii). USITC, HTS (2026) Revision 3, Publication 5705, February 2026, pp. GN.1, GN.17, GN.21.

## Tariffs initiated under the International Emergency Economic Powers Act (“IEEPA”)<sup>19</sup>

### Country specific IEEPA tariffs

Effective March 4, 2025, fresh winter strawberries originating in Mexico were subject to an additional 25 percent ad valorem duty under IEEPA. Effective March 7, 2025, products originating in Mexico that enter with duty free treatment under the USMCA are not subject to the additional 25 percent ad valorem duty under IEEPA.<sup>20</sup>

### Tariffs initiated in April 2025 under IEEPA

Fresh winter strawberries originating in Mexico are not subject to tariffs initiated in April 2025 under IEEPA.<sup>21</sup>

**Table 1.2 Fresh winter strawberries: Additional tariffs on imports originating in Mexico as of February 13, 2026**

Duty rates in percent ad valorem

<b>Additional tariff</b>	<b>Mexico</b>
IEEPA – Mexico specific	25
Tariffs initiated in April 2025 under IEEPA	NA
Total additional ad valorem rate	25

Source: Federal Register notices and other sources cited in this section (Tariff treatment).

Note: For the purposes of this table, “not applicable” is shown as “NA.” This applies when the subject product from that subject country is not subject to the tariff for any reason.

Note: Duty rates in the table reflect the duty rates as of the writing of this report. See the text above for historical changes to the additional tariffs.

Note: Effective March 7, 2025, products originating in Mexico that enter with duty free treatment under the USMCA are not subject to the additional 25 percent ad valorem duty under IEEPA.

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<sup>19</sup> Multiple tariffs have been enacted under the authority of the International Emergency Economic Powers Act (“IEEPA”), including tariffs that apply to countries that may not be subject in this proceeding. Tariffs specific to Canada, China, and Mexico were initiated in February 2025. Tariffs initiated in April 2025 under IEEPA were applied globally. Tariffs specific to Brazil were initiated in July 2025. Tariffs specific to India were initiated in August 2025. Tariffs under IEEPA have been amended over time. On February 20, 2026, the Supreme Court held that IEEPA does not authorize the President to impose tariffs. See *Learning Resources Inc. v. Trump*, No. 24-1287, 2026 WL 477534, 607 \_\_\_ U.S. (2026).

<sup>20</sup> 90 FR 9117, February 7, 2025; 90 FR 9185, February 10, 2025; 90 FR 11787, March 11, 2025. See also HTS headings 9903.01.01 and 9903.01.04 and U.S. note 2(a) to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC, HTS (2026) Revision 3, Publication 5705, February 2026, pp. 99.3.1, 99.3.365.

<sup>21</sup> Imports originating in Mexico were exempt from tariffs initiated in April 2025 under IEEPA. 90 FR 15041, April 7, 2025. See also HTS headings 9903.01.25 and 9903.01.27 and U.S. note 2(v) to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC, HTS (2026) Revision 3, Publication 5705, February 2026, pp. 99.3.5 to 99.3.42, 99.3.367 to 99.3.368.

## The product

### Description and applications

Strawberries, the fruit of the plant *Fragaria x ananassa*, are a seasonal, perishable produce product that are typically red in color.<sup>22</sup> The window or “season” of production in any one growing region is typically limited by the weather conditions that are conducive for strawberry cultivation. Strawberries grow well in mild temperatures ranging from 50 to 80 degrees Fahrenheit, with consistent but not excessive moisture, and at least eight hours of sunlight a day.<sup>23</sup> The highly perishable fruit have a shelf-life of up to two weeks once harvested.<sup>24</sup> Strawberries are primarily consumed fresh, with the majority, (reportedly up to 85 percent) sold through retail channels.<sup>25</sup> Despite a limited production season in any given location, demand for strawberries over the last quarter century has become increasingly year-round and is growing, driven by consumer interest in healthier eating and an increase in availability of the fruit.<sup>26</sup> Standards for strawberries are set by the U.S. Department of Agriculture based on color, size, and quality.<sup>27</sup>

While strawberries are grown in all U.S. states, commercial production is concentrated in California and Florida.<sup>28</sup> Strawberry production in California, which produced 90 percent of the U.S.’s 1.5 million metric tons of strawberries in 2024, runs year-round across three main

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<sup>22</sup> Petition, p 4; *Blue Book*, “Strawberry Market Summary,” <https://www.bluebookservices.com/kyc/strawberries/>, accessed December 15, 2025.

<sup>23</sup> *Blue Book*, “Strawberry Market Summary,” <https://www.bluebookservices.com/kyc/strawberries/>, accessed December 15, 2025; Driscoll’s postconference brief, p 4.

<sup>24</sup> Yeh et al., *The Changing Landscape of U.S. Strawberry and Blueberry Markets*, September 2023, p. 11, <https://www.ers.usda.gov/sites/default/files/laserfiche/publications/107358/EIB-257.pdf?v=43536>.

<sup>25</sup> Conference transcript p. 222 (Farley); California Strawberry Commission, “Economic Contributions of Strawberry Farming,” 2025, p. 9, <https://www.californiastrawberries.com/wp-content/uploads/2025/06/CSC-012-2022-Economic-Impact-Report-Short-Run-Approved.pdf>.

<sup>26</sup> Agricultural Marketing Resource Center, “Strawberries,” April 2024.

<sup>27</sup> USDA, AMS, *United States Standards for Grades of Strawberries*, effective February 23, 2006, [https://www.ams.usda.gov/sites/default/files/media/Strawberry\\_Standard%5B1%5D.pdf](https://www.ams.usda.gov/sites/default/files/media/Strawberry_Standard%5B1%5D.pdf).

<sup>28</sup> *Blue Book*, “Strawberry Market Summary,” <https://www.bluebookservices.com/kyc/strawberries/>, accessed December 15, 2025; Wade et al., *A Review of Strawberry Production and Price Trends from 2010 to 2022*, April 23, 2024, <https://ask.ifas.ufl.edu/publication/FE1143>.

growing regions, though most of the state’s production is from April to November.<sup>29</sup> In Florida, which is responsible for the remaining 10 percent of U.S. production in 2024, strawberries are harvested from December through April.<sup>30</sup> To meet year-round demand in the United States, strawberries are grown in Mexico, primarily in Baja California central Mexico.<sup>31</sup> Growing conditions in Mexico that are conducive for strawberry cultivation occur October through March.<sup>32</sup>

Strawberry growers across growing regions utilize a number of strawberry varieties for specific purposes, and reportedly, many of the same varieties are used across growing regions.<sup>33</sup> Some varieties might offer pest or disease resistance, produce fruit at different times in the local growing season (e.g. “early”, “middle”, “late” season varieties), have a longer shelf life, or otherwise offer a grower some other characteristic beneficial to their growing needs. Unlike other fruits, like apples where the variety is part of consumer marketing, consumers are not as likely to be aware of different strawberry varieties when making purchases.<sup>34</sup>

## Manufacturing processes

Strawberry plants are transplanted by hand into raised beds covered in plastic mulch.<sup>35</sup> In Florida, strawberries are grown in the open, while in central Mexico, strawberries are grown under plastic structures called high tunnels that protect the plants from excessive moisture and

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<sup>29</sup> Strawberry production in California has increased by 184,801 tons (13 percent) to 1,624,011 tons over 2022-24. Over the same time period, acres harvested have increased by 1,500 acres (3 percent). USDA, NASS, QuickStats database, “Strawberries: production, Strawberries: acres harvested”, <https://quickstats.nass.usda.gov/>, accessed December 15, 2025; Conference transcript, pp. 13-14 (Tomlinson).

<sup>30</sup> Strawberry production in Florida has increased by 28,000 tons (18 percent) to 185,921 tons over 2022-24. Over the same time period, acres harvested have increased by 3,400 acres (27 percent). USDA, NASS, QuickStats database, “Strawberries: production, Strawberries: acres harvested”, <https://quickstats.nass.usda.gov/>, accessed December 15, 2025; *Blue Book*, “Strawberry Market Summary,” <https://www.bluebookservices.com/kyc/strawberries/>, accessed December 15, 2025.

<sup>31</sup> Strawberry production in Mexico increased by 130,040 tons (20 percent) to 767,332 tons over 2022-24. Over the same time period, acres harvested increased by 6,337 acres (19 percent). Government of Mexico, SIAP, Anuario estadístico de la producción agrícola (Agricultural production statistical yearbook), [https://nube.agricultura.gob.mx/cierre\\_agricola/](https://nube.agricultura.gob.mx/cierre_agricola/), accessed February 17, 2026.

<sup>32</sup> *Blue Book*, “Strawberry Market Summary,” <https://www.bluebookservices.com/kyc/strawberries/>, accessed December 15, 2025; Conference transcript p. 182 (Bustamante).

<sup>33</sup> Conference transcript, pp. 274-275 (Lambert, Wiemers, Greeff).

<sup>34</sup> Thompson, “Variety is the Spice of Life (and Apple Sales),” <https://producebusiness.com/variety-is-the-spice-of-life-and-apple-sales/>, January 29, 2024; Conference transcript, p. 112 (Sizemore).

<sup>35</sup> Driscoll’s postconference brief, answers to staff questions, pp. 31-32.

changes in temperatures.<sup>36</sup> Strawberries across the growing regions in the United States and Mexico are harvested by hand multiple times a week.<sup>37</sup> There are reports of input cost increases, especially labor, in Florida, California, and Mexico.<sup>38</sup>

After the strawberries are picked, they are brought to a pack station where they are cooled to 34 degrees Fahrenheit.<sup>39</sup> Once picked, Florida strawberries can reach store shelves in the southern as well as eastern parts of the United States within 48 hours.<sup>40</sup> Around one third of strawberries produced in Mexico are exported to the United States.<sup>41</sup> Strawberries that are harvested in central Mexico are often shipped overnight so that they are crossing the border the next day and then on to the final destination the next.<sup>42</sup> Due to differences in freight costs, it is reportedly cheaper to ship strawberries out of Florida than it is to ship from Mexico or California to customers based in New York.<sup>43</sup>

Strawberry production is sensitive to weather conditions, leading to volatility in supply and, in turn, pricing.<sup>44</sup> A cold spell over a couple of days can slow ripening and cause short term supply constraints.<sup>45</sup> In 2022 and 2024, hurricanes hit Florida at the beginning of the planting season, delaying planting and thus harvest.<sup>46</sup> This delayed harvest resulted in Florida growers missing the early part of the winter season when prices are reportedly higher and arguably contributed to an oversupply of strawberries and lower prices later in the season.<sup>47</sup>

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<sup>36</sup> Wu et al., “An Overview of Strawberry Production in Mexico,” <https://ask.ifas.ufl.edu/publication/FE1014>, February 1, 2018 (reviewed June 3, 2025).

<sup>37</sup> Conference transcript, p. 237 (Wiemers, Lambert); Conference transcript, pp. 102 (Sizemore).

<sup>38</sup> Conference transcript, pp. 18, 23 (Tomlinson); Dutton, “Florida Strawberry Growers Report Strong Season Ahead Despite Weather, Labor Pressures,” <https://www.thepacker.com/news/produce-crops/florida-strawberry-growers-report-strong-season-ahead-despite-weather-labor-pr>, December 12, 2025; Conference transcript, pp. 246-247 (Murray, Bustamante).

<sup>39</sup> Conference transcript, p. 121 (Sizemore).

<sup>40</sup> Ohlemeier, “Florida Strawberries Offer a Ray of Sunshine During Winter,” <https://producebusiness.com/florida-strawberries-offer-a-ray-of-sunshine-during-winter/>, January 11, 2022.

<sup>41</sup> Aneberries’ postconference brief, pp 15; Wu et al., “An Overview of Strawberry Production in Mexico,” <https://ask.ifas.ufl.edu/publication/FE1014>, February 1, 2018 (reviewed June 3, 2025).

<sup>42</sup> Conference transcript, p. 251 (Hestean).

<sup>43</sup> Conference transcript, p. 164 (Katzman).

<sup>44</sup> Conference transcript, p. 42 (Parker); Conference transcript, pp. 78-79, 83, 102, 118-119, 156-157, 171, 213-215 (Pickard, Parker, Sizemore, Farley, Prusa, Mathieson).

<sup>45</sup> Conference transcript, pp. 164-165 (Katzman).

<sup>46</sup> Conference transcript, pp. 174, 214 (Prusa, Mathieson).

<sup>47</sup> Driscoll’s postconference brief, pp. 10, 37, answers to staff questions, pp. 31-36.

Heavy rains in Fall 2025 disrupted strawberry production in California, causing prices to rise nationally.<sup>48</sup>

There are generally two ways of bringing strawberries to market. One is through independent operations that integrate growing, packing, and marketing within one firm; these reportedly are responsible for a majority of Florida strawberry production.<sup>49</sup> The other is through shippers (also called marketers). These shippers can own the strawberry farms outright, contract production with growers, and/or source production from independent growers on a toll basis.<sup>50</sup> Shippers will often source strawberries from multiple growing regions to meet year-round demand.<sup>51</sup> In addition to USDA's strawberry standards, both shippers and buyers have their own standards.<sup>52</sup> Shippers sell strawberries to customers across different sectors, though primarily into retail as that is where the majority of strawberries are sold.<sup>53</sup> The sale of strawberries into retail is often done through "programs", which are pre-arranged long-term supply agreements specifying weekly volumes.<sup>54</sup> Prices under programs are set at variable points in time in advance of delivery, from a week to a month or more.<sup>55</sup> Program sales offer stability to both shippers and retailers as supply and prices are volatile for strawberries.<sup>56</sup>

Another avenue for strawberry sales is in terminal markets, typically using spot pricing. While larger retailers source strawberries through program partnerships with strawberry shippers, smaller retailers and other distributors tend to source strawberries from terminal markets.<sup>57</sup> While growers and shippers typically try to avoid selling strawberries into terminal markets to avoid the volatility of spot pricing, the terminal markets are used to offload extra berries.<sup>58</sup>

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<sup>48</sup> Conference transcript, p. 171 (Prusa); Driscoll's postconference brief, p. 10.

<sup>49</sup> Conference transcript, p. 75 (Parker).

<sup>50</sup> Conference transcript, pp. 223-224 (Farley, Weimer).

<sup>51</sup> Conference transcript, pp. 14-15 (Tomlinson); Conference transcript pp. 190, (Eagan); Conference transcript, pp. 238-239 (Lambert).

<sup>52</sup> Conference transcript, p. 149 (Mathieson); Conference transcript, p. 155 (Farley); Driscoll's postconference brief, p. 7.

<sup>53</sup> Conference transcript, p. 222 (Farley).

<sup>54</sup> Conference transcript, p. 149 (Mathieson); Conference transcript, p. 160 (Weimer); Conference transcript, pp. 185, 248-249 (Farley).

<sup>55</sup> Conference transcript, p. 185 (Farley); Conference transcript, p. 229 (Rose).

<sup>56</sup> Conference transcript, pp. 187-189 (Murray, Mathieson, Hilton).

<sup>57</sup> Conference transcript, pp. 215-216 (Katzman).

<sup>58</sup> Conference transcript, p. 216 (Katzman); Conference transcript, p. 248 (Rose); Conference transcript, pp. 248-249 (Farley).

## Domestic like product issues

Petitioner argued during the staff conference and in its postconference brief that the Commission should define the domestic-like product coextensive with the scope (i.e., fresh winter strawberries) and that winter strawberries are distinct from non-winter strawberries.<sup>59</sup>

<sup>60</sup> Respondents Driscoll's, Inc. and Driscoll's Operaciones, S.A. de C.V. (collectively, "Driscoll's") and San Vicente Camalu, S. de P.R. de R.L. ("SVC") argue in their postconference briefs that the Commission should expand the domestic like product definition to include all fresh strawberries regardless of season.<sup>61 62 63</sup>

The Commission's decision regarding the appropriate domestic product(s) that are "like" the subject imported product is based on a number of factors including: (1) physical characteristics and uses; (2) interchangeability; (3) channels of distribution; (4) common manufacturing facilities, production processes, and production employees; (5) customer and producer perceptions; and (6) price.

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<sup>59</sup> Conference transcript, pp. 52, 55-57 (Pickard). Petitioner's postconference brief, pp. 6-8; answers to staff questions, 37-48.

<sup>60</sup> Petitioner also argues in its postconference briefs that fresh winter strawberries are a separate domestic like product from frozen or processed winter strawberries. Petitioner's postconference brief, answers to staff questions, pp. 48-49. Driscoll's noted that, at this stage in the investigation, it takes no position on whether frozen strawberries should be included in the domestic like product or whether to separate organic and traditional strawberries. Driscoll's postconference brief, p. 8, n. 38. The other parties did not make domestic like product arguments with respect to frozen or processed and/or organic strawberries.

<sup>61</sup> Driscoll's postconference brief, p. 2; answers to staff questions, pp. 1-9.

<sup>62</sup> SVC's postconference brief, pp. 5-30.

<sup>63</sup> Aneberries A.C. ("Aneberries") and Mainland Farms S.A. de C.V. ("Mainland Farms") did not make any arguments with respect to the domestic like product definition in their postconference briefs. The Fresh Produce Association of the Americas and Walmart also submitted comments, but those comments did not make any arguments with respect to the domestic like product definition.

Table 1.3 shows firm response counts regarding the comparability of fresh winter strawberries (October 1 through March 31)<sup>64</sup> to non-winter fresh strawberries for each of the six domestic like product factors by firm type.<sup>65</sup> The majority of within region producers responded that winter and non-winter strawberries are never comparable on all six comparability factors, while the vast majority of out-of-region U.S. producers reported that the products are fully comparable on all six factors. The majority of U.S. importers reported that winter and non-winter strawberries are fully or mostly comparable on each of the factors.

**Table 1.3 All fresh strawberries: Count of firms' responses regarding the comparability of fresh winter strawberries to all other (non-winter) fresh strawberries, by domestic like product factor and firm type**

Count in number of firms reporting

Factor	Firm type	Fully	Mostly	Somewhat	Never
Physical characteristics	Within region U.S. producers	4	1	2	9
Interchangeability	Within region U.S. producers	7	0	0	8
Channels	Within region U.S. producers	7	0	0	8
Manufacturing	Within region U.S. producers	7	0	0	8
Perceptions	Within region U.S. producers	3	2	2	9
Price	Within region U.S. producers	2	2	0	11
Physical characteristics	Out-of-region U.S. producers	19	0	0	0
Interchangeability	Out-of-region U.S. producers	19	0	0	0
Channels	Out-of-region U.S. producers	19	0	0	0
Manufacturing	Out-of-region U.S. producers	19	0	0	0
Perceptions	Out-of-region U.S. producers	18	1	0	0
Price	Out-of-region U.S. producers	17	1	0	1
Physical characteristics	All U.S. producers	23	1	2	9
Interchangeability	All U.S. producers	26	0	0	8
Channels	All U.S. producers	26	0	0	8
Manufacturing	All U.S. producers	26	0	0	8
Perceptions	All U.S. producers	21	3	2	9
Price	All U.S. producers	19	3	0	12
Physical characteristics	Importers	6	4	1	0
Interchangeability	Importers	10	1	0	0
Channels	Importers	8	3	0	0
Manufacturing	Importers	8	1	0	0
Perceptions	Importers	2	8	1	0
Price	Importers	2	5	2	2

Source: Compiled from data submitted in response to Commission questionnaires.

<sup>64</sup> The petition defined the scope as covering all fresh and chilled winter strawberries from Mexico harvested or entered during the period October 1 through March 31, whereas the scope defined by Commerce defines the winter period as November 1 through March 31. Data presented in this report uses the petition winter period scope definition of October 1 through March 31.

<sup>65</sup> Additionally, app. D presents U.S. producers' and U.S. importers' narrative responses regarding the comparability of fresh winter strawberries to all other (non-winter) fresh strawberries, by each of the six domestic like product factors.

## Physical characteristics and uses

Petitioner argues that fresh winter strawberries and non-winter strawberries have significant physical differences as they argue they are genetically distinct and have differences in flavor, sweetness, and juiciness.<sup>66</sup> Driscoll's argues that there are no differences in the physical characteristics or uses between fresh winter and non-winter strawberries, citing questionnaire data and arguing that consumers do not know the difference between strawberries grown in different months.<sup>67</sup> SVC argues that fresh winter and non-winter strawberries are largely physically indistinguishable and are sold as fresh strawberries for the same end uses and that there is overlap in the types of varieties grown across regions.<sup>68</sup>

## Interchangeability

Petitioner argues that winter strawberries are not interchangeable with non-winter strawberries as products that are physically available in the winter season cannot be interchangeable with products that are not available in the winter season.<sup>69</sup> Driscoll's argues that winter and non-winter fresh strawberries are fully interchangeable in terms of use and points to questionnaire data and U.S. Department of Agriculture standard classifications for strawberries.<sup>70</sup> SVC disagrees with Petitioner's attempt to define interchangeability on a temporal basis and argues that the record shows that purchasers treat strawberries from different regions and months as substitutes.<sup>71</sup>

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<sup>66</sup> Petitioner's postconference brief, answers to staff questions, pp. 37-40.

<sup>67</sup> Driscoll's postconference brief, answers to staff questions, pp. 1-4.

<sup>68</sup> SVC's postconference brief, pp. 20-22.

<sup>69</sup> Petitioner's postconference brief, answers to staff questions, p. 41.

<sup>70</sup> Driscoll's postconference brief, answers to staff questions, pp. 4-6.

<sup>71</sup> SVC's postconference brief, pp. 22-24.

## Channels of distribution

Petitioner argues that there are significant differences in the channels of distribution for winter strawberries and non-winter strawberries.<sup>72</sup> Driscoll’s argues that questionnaire data demonstrate that winter and non-winter strawberries are sold in the same channels of distribution and that channels do not distinguish between winter and non-winter strawberries.<sup>73</sup> SVC argues that Florida and California strawberries move through the same commercial channels, that growers and packers sell through the same types of intermediaries (shippers, distributors, and retailers), and that strawberries from different origins are sold side-by-side in the same retail outlets.<sup>74</sup>

Table 1.4 shows the share of U.S. producers’ U.S. shipments by product type, channel of distribution, and period as reported in questionnaire responses.

**Table 1.4 All fresh strawberries: Share of U.S. producers’ U.S. shipments by product type, channel of distribution and period**

Share in percent; Interim period is January through September

Product type	Channel	2022	2023	2024	Interim 2024	Interim 2025
Fresh winter strawberries	Distributors	***	***	***	***	***
Fresh winter strawberries	Retailers	***	***	***	***	***
Fresh winter strawberries	End users	***	***	***	***	***
All other (non-winter) fresh strawberries	Distributors	***	***	***	***	***
All other (non-winter) fresh strawberries	Retailers	***	***	***	***	***
All other (non-winter) fresh strawberries	End users	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

<sup>72</sup> Petitioner’s postconference brief, answers to staff questions, pp. 41-43.

<sup>73</sup> Driscoll’s postconference brief, answers to staff questions, pp. 6-7.

<sup>74</sup> SVC’s postconference brief, p. 24.

## Customer and producer perceptions

Petitioner argues that customers and producers perceive winter strawberries to be distinct from non-winter strawberries citing staff conference testimony.<sup>75</sup> Driscoll's argues that consumers do not perceive a difference between winter and non-winter strawberries and that consumers expect strawberries to be on shelves every day, not winter or non-winter strawberries, depending on the month.<sup>76</sup> SVC argues that there is no meaningful difference in consumer or producer perceptions of Florida and California strawberries that would support splitting fresh strawberries into separate winter and non-winter like products and provides example pictures of retail product labeling that it argues support this assertion.<sup>77</sup>

## Manufacturing facilities and production employees

Petitioner argues that winter strawberries and non-winter strawberries have distinct facilities, growing practices, and employees, including differences in plant densities, growing bed size, planting techniques, and irrigation practices.<sup>78</sup> Driscoll's argues that there is no difference in the production facilities/farms and employees between winter and non-winter strawberries, other than physical location.<sup>79</sup> SVC argues that relevant facilities are fields and packing operations and that the fact that Florida and California strawberries are harvested on different farms by different workers is inherent in agricultural production and does not suggest a different product.<sup>80</sup> Table 1.5 presents the count of respondent U.S. producers engaged in production by product type (winter, non-winter, or both).

**Table 1.5 All fresh strawberries: Count of respondent U.S. producers engaged in production, by product type**

Count in number of firms

Product type	Count
Only fresh winter strawberries	***
Only all other (non-winter) fresh strawberries	***
Both fresh winter and all other fresh strawberries	***

Source: Compiled from data submitted in response to Commission questionnaires.

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<sup>75</sup> Petitioner's postconference brief, answers to staff questions, pp. 43-45.

<sup>76</sup> Driscoll's postconference brief, answers to staff questions, p. 7.

<sup>77</sup> SVC's postconference brief, pp. 24-28.

<sup>78</sup> Petitioner's postconference brief, answers to staff questions, pp. 45-46.

<sup>79</sup> Driscoll's postconference brief, answers to staff questions, pp. 7-8.

<sup>80</sup> SVC's postconference brief, p. 28.

## Price

Petitioner argues that winter strawberries are a premium product, of different varieties, that taste better, and that the evidence demonstrates that they are sold at different prices than non-winter strawberries.<sup>81</sup> Driscoll’s argues that prices are higher in the winter months than the summer months, but there is not a dramatic difference between October (out of season) and November (in season) or between March (in season) and April (out of season).<sup>82</sup> SVC argues that as strawberries are in a perishable commodity market, seasonal price variation is expected and that these seasonal pricing variations reflect shifting supply conditions (e.g., weather disruptions, freight and logistics constraints, and short-term quality and volume) and not a different product.<sup>83</sup>

Table 1.6 shows the average unit values of U.S. producers’ U.S. shipments, by product type and period.

**Table 1.6 All fresh strawberries: Average unit value of U.S. producers U.S. shipments, by product type and period**

Share in percent; Interim period is January through September

Product type	2022	2023	2024	Interim 2024	Interim 2025
Fresh winter strawberries	***	***	***	***	***
All other (non-winter) fresh strawberries	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

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<sup>81</sup> Petitioner’s postconference brief, answers to staff questions, pp. 46-48.

<sup>82</sup> Driscoll’s postconference brief, answers to staff questions, pp. 8-9.

<sup>83</sup> SVC’s postconference brief, pp. 29-30.

## Regional industries

Section 771(4)(C) of the Act (19 U.S.C. § 1677(4)(C)) defines the specific conditions under which the Commission can treat a specific geographic area as a standalone regional industry for trade remedy purposes —

*In appropriate circumstances, the United States, for a particular product market, may be divided into 2 or more markets and the producers within each market may be treated as if they were a separate industry if—*

- (i) the producers within such market sell all or almost all of their production of the domestic like product in question in that market, and*
- (ii) the demand in that market is not supplied, to any substantial degree, by producers of the product in question located elsewhere in the United States.*

*In such appropriate circumstances, material injury, the threat of material injury, or material retardation of the establishment of an industry may be found to exist with respect to an industry even if the domestic industry as a whole, or those producers whose collective output of a domestic like product constitutes a major proportion of the total domestic production of that product, is not injured, if there is a concentration of dumped imports or imports of merchandise benefiting from a countervailable subsidy into such an isolated market and if the producers of all, or almost all, of the production within that market are being materially injured or threatened by material injury, or if the establishment of an industry is being materially retarded, by reason of the dumped imports or imports of merchandise benefiting from a countervailable subsidy.*

## Regional industries tests: Fresh winter strawberries

The following information relates to the application of the regional industries test with respect to the domestic like product matching the scope definition as defined in the petition: fresh winter strawberries (i.e., strawberries harvested between October 1 through March 31).

### First statutory criterion in regional industries: Fresh winter strawberries

The first statutory criterion in the application of the regional industries provision is that the producers within such market sell all or almost all of their production of the domestic like product in question in that market. Table 1.7 presents within region U.S. producers' U.S. shipments of fresh winter strawberries by region. As shown, U.S. producers shipped \*\*\* percent or more of their U.S. shipments of fresh winter strawberries within region.

**Table 1.7 Fresh winter strawberries: Within region U.S. producers' U.S. shipments by region shipped and period**

Quantity in 1,000 pounds; Share in percent; Interim period is January through September

Region shipped	Measure	2022	2023	2024	Interim 2024	Interim 2025
Within region	Quantity	***	***	***	***	***
Out-of-region	Quantity	***	***	***	***	***
All regions	Quantity	***	***	***	***	***
Within region	Share	***	***	***	***	***
Out-of-region	Share	***	***	***	***	***
All regions	Share	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

**Second statutory criterion in regional industries: Fresh winter strawberries**

The second statutory criterion in the application of the regional industries provision is that the demand in that market is not supplied, to any substantial degree, by producers of any domestic like product located elsewhere in the United States. Table 1.8 presents within region apparent U.S. consumption of fresh winter strawberries. The table shows the quantities and proportion of within region apparent consumption that is supplied by out-of-region U.S. shipments. Out-of-region U.S. shipments (i.e., from California) of fresh winter strawberries supplied \*\*\* percent or less of within region apparent U.S. consumption in all periods.

**Table 1.8 Fresh winter strawberries: Within region apparent consumption analyzing within region U.S shipments by out-of-region U.S. producers, by period**

Quantity in 1,000 pounds; Share in percent; Interim period is January through September

Source	Measure	2022	2023	2024	Interim 2024	Interim 2025
Out-of-region U.S. producers: Within region U.S. shipments	Quantity	***	***	***	***	***
Within region U.S. producers' U.S. shipments within region and all U.S. imports combined	Quantity	***	***	***	***	***
Overall within region apparent consumption	Quantity	***	***	***	***	***
Out-of-region U.S. producers: Within region U.S. shipments	Share	***	***	***	***	***
Within region U.S. producers' U.S. shipments within region and all U.S. imports combined	Share	***	***	***	***	***
Overall within region apparent consumption	Share	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to the Commission's U.S. producers' questionnaires and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, adjusted to report only within region imports by source using the experience of respondents to the Commission's U.S. importer questionnaire. Imports are based on the imports for consumption data series.

### **Concentration of dumped or subsidized imports: Fresh winter strawberries**

The regional industries provision provides that the Commission may find injury within a specific regional industry, even if the national industry remains healthy, provided that the allegedly unfairly traded imports are concentrated within that specific regional market and all (or nearly all) producers within that region are suffering material injury or threat of injury due to those imports. For purposes of measuring the concentration of imports for the Commission's regional analysis, table 1.9 presents U.S. imports of fresh winter strawberries from Mexico by destination (within region vs. out-of-region). Within region destination U.S. imports of fresh winter strawberries from Mexico accounted for 60.6 percent or more of total such imports in each period of the investigations.

**Table 1.9 Fresh winter strawberries: U.S. imports from Mexico, by destination region and period**

Quantity in 1,000 pounds; Share in percent; Interim period is January through September

<b>Destination region</b>	<b>Measure</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>Interim 2024</b>	<b>Interim 2025</b>
Within region	Quantity	285,700	246,705	334,591	211,106	195,809
Out-of-region	Quantity	135,365	154,590	133,783	127,675	127,183
All regions	Quantity	421,065	401,295	468,374	338,781	322,992
Within region	Share	67.9	61.5	71.4	62.3	60.6
Out-of-region	Share	32.1	38.5	28.6	37.7	39.4
All regions	Share	100.0	100.0	100.0	100.0	100.0

Source: Official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026. Imports are based on the imports for consumption data series.

**Regional industries tests: Expanded like product (all fresh strawberries)**

The following information relates to the application of the regional industries test with respect to an expanded domestic like product definition consisting of all fresh strawberries regardless of harvest season.

**First statutory criterion in regional industries: Expanded like product (all fresh strawberries)**

The first statutory criterion in the application of the regional industries provision is that the producers within such market sell all or almost all of their production of the domestic like product in question in that market. Table 1.10 presents within region U.S. producers' U.S. shipments of all fresh strawberries by region shipped and period. As shown, \*\*\* percent or greater of within region U.S. producers' U.S. shipments by volume were shipped within region (conversely within region U.S. producers' out-of-region shipments accounted for \*\*\* percent or less of shipments across the investigation periods).

**Table 1.10 All fresh strawberries: Within region U.S. producers' U.S. shipments by region shipped and period**

Quantity in 1,000 pounds; Share in percent; Interim period is January through September

Region shipped	Measure	2022	2023	2024	Interim 2024	Interim 2025
Within region	Quantity	***	***	***	***	***
Out-of-region	Quantity	***	***	***	***	***
All regions	Quantity	***	***	***	***	***
Within region	Share	***	***	***	***	***
Out-of-region	Share	***	***	***	***	***
All regions	Share	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

**Second statutory criterion in regional industries: Expanded like product (all fresh strawberries)**

The second statutory criterion in the application of the regional industries provision is that the demand in that market is not supplied, to any substantial degree, by producers of any domestic like product located elsewhere in the United States. Table 1.11 presents within region apparent U.S. consumption of all fresh strawberries. The table shows the quantities and proportion of within region apparent consumption that is supplied by out-of-region U.S. shipments. Out-of-region U.S. shipments (i.e., from California) of all fresh strawberries supplied \*\*\* percent or more of within region apparent U.S. consumption in all periods.

**Table 1.11 All fresh strawberries: Within region apparent consumption analyzing within region U.S. shipments by out-of-region U.S. producers, by period**

Quantity in 1,000 pounds; Share in percent; Interim period is January through September

Source	Measure	2022	2023	2024	Interim 2024	Interim 2025
Out-of-region U.S. producers: Within region U.S. shipments	Quantity	***	***	***	***	***
Within region U.S. producers' within region U.S. shipments and all U.S. imports combined	Quantity	***	***	***	***	***
Overall within region apparent consumption	Quantity	***	***	***	***	***
Out-of-region U.S. producers: Within region U.S. shipments	Share	***	***	***	***	***
Within region U.S. producers' within region U.S. shipments and all U.S. imports combined	Share	***	***	***	***	***
Overall within region apparent consumption	Share	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to the Commission's U.S. producers' questionnaires and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.2010, 0810.10.2020, 0810.10.2040, 0810.10.2060, 0810.10.2080, 0810.10.2090, 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026 adjusted to report only within region imports by source using the experience of respondents to the Commission's U.S. importer questionnaire.

**Concentration of dumped or subsidized imports: Expanded like product (all fresh strawberries)**

The regional industries provision provides that the Commission may find injury within a specific regional industry, even if the national industry remains healthy, provided that the allegedly unfairly traded imports are concentrated within that specific regional market and all (or nearly all) producers within that region are suffering material injury or threat of injury due to those imports. For purposes of measuring the concentration of imports for the Commission’s regional analysis, table 1.12 presents U.S. imports of all fresh strawberries from Mexico, by destination region and period. According to official import statistics, 61.9 percent or less of U.S. imports of all fresh strawberries from Mexico were destined for within region states during the investigation periods (conversely, 38.1 percent or more of U.S. imports of all fresh strawberries from Mexico were destined for out-of-region states during the investigation periods).

**Table 1.12 All fresh strawberries: U.S. imports from Mexico, by destination region and period**

Quantity in 1,000 pounds; Share in percent; Interim period is January through September

<b>Destination region and product type</b>	<b>Measure</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>Interim 2024</b>	<b>Interim 2025</b>
Within region: Winter	Quantity	285,700	246,705	334,591	211,106	195,809
Within region: Non-winter	Quantity	24,022	26,204	19,816	20,406	10,239
Out-of-region: Winter	Quantity	135,365	154,590	133,783	127,675	127,183
Out-of-region: Non-winter	Quantity	106,708	148,661	84,001	83,357	115,307
All regions	Quantity	551,794	576,161	572,191	442,545	448,538
Within region: Winter	Share	51.8	42.8	58.5	47.7	43.7
Within region: Non-winter	Share	4.4	4.5	3.5	4.6	2.3
Out-of-region: Winter	Share	24.5	26.8	23.4	28.9	28.4
Out-of-region: Non-winter	Share	19.3	25.8	14.7	18.8	25.7
All regions	Share	100.0	100.0	100.0	100.0	100.0

Source: Official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.2010, 0810.10.2020, 0810.10.2040, 0810.10.2060, 0810.10.2080, 0810.10.2090, 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026. Imports are based on the imports for consumption data series.

Figure 1.1 presents the quantity of monthly production for all strawberries by producer type.

**Figure 1.1 All strawberries: Production quantity, by source and month**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires.

## Part 2: Conditions of competition in the U.S. market

### U.S. market characteristics

Leading U.S. producers of fresh winter strawberries are in Florida (“within-region”) and California (“out-of-region”). Some producers import strawberries from Mexico during the winter months. Within-region producers described these imports as injuring the U.S. winter strawberries industry. Twenty-one U.S. producers and five importers indicated that the market was subject to distinctive conditions of competition, citing a variety of such conditions, including regional differences, climate effects, and competition from Mexican product. For example, importer \*\*\* reported that fresh winter strawberry supply is affected by weather conditions, impacting regional prices. Importer \*\*\* noted that price affects demand, adding fresh winter strawberries can be a “luxury good,” and thus consumption of fresh winter strawberries is discretionary. In addition, the importer reported that the availability of a “large work force to pick the fruit” can be limited in a “booming economy.” Importers \*\*\* reported that customer demand increases around holidays. Twelve U.S. producers and five importers indicated that the winter strawberry market was not subject to distinctive conditions of competition.

Apparent U.S. consumption of fresh winter strawberries increased during January 2022 to September 2025 (both within region and nationally). Overall, apparent U.S. consumption in 2024 was higher than in 2022. Domestic demand, according to responding firms, has grown, and modern customers expect year-round availability of strawberries at retail. U.S. producers have increased production to meet this growing demand.<sup>1</sup> According to \*\*\*, production of fresh winter strawberries, particularly in Florida, has expanded and grown over the last decade.<sup>2</sup> \*\*\* described the overall market for strawberries as highly integrated throughout the United States, with the product distributed through “national logistics networks.”

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<sup>1</sup> Petitioner’s postconference brief, pp. 12-13.

<sup>2</sup> \*\*\* postconference brief, pp.7-9.

## Impact of section new or modified tariffs

U.S. producers and importers were asked to report the impact of new or modified tariffs on overall demand, supply, prices, or raw material costs (table 2.1). Most within region U.S. producers and importers reported that new or modified tariffs did not impact overall demand, supply, prices, or raw material costs. U.S. producers reporting impacts indicated that new or modified tariffs on agricultural inputs had increased their production costs. Importers \*\*\* described ongoing impacts on costs and supply.

**Table 2.1 Fresh winter strawberries: Count of firms' responses regarding whether there had been an impact of the new or modified tariffs, by firm type**

Firm type	No	Yes	Don't know
U.S. producers: Located within region	8	5	3
U.S. producers: Located throughout the U.S.	8	23	3
Importers	7	4	3

Source: Compiled from data submitted in response to Commission questionnaires.

## Channels of distribution

U.S. producers, both within region and nationally, sold approximately evenly to distributors and retailers. Importers sold mainly to retailers, but with a substantial share going to distributors as well, as shown in tables 2.2 and 2.3.

**Table 2.2 Fresh winter strawberries: Share of within region U.S. shipments (defining the domestic industry as within region U.S. producers) by source, channel of distribution, and period**

Shares in percent; interim is January through September

Source	Channel	2022	2023	2024	Interim 2024	Interim 2025
U.S. producers: Located within region	Distributors	***	***	***	***	***
U.S. producers: Located within region	Retailers	***	***	***	***	***
U.S. producers: Located within region	End users	***	***	***	***	***
Mexico	Distributors	***	***	***	***	***
Mexico	Retailers	***	***	***	***	***
Mexico	End users	***	***	***	***	***
Nonsubject sources	Distributors	***	***	***	***	***
Nonsubject sources	Retailers	***	***	***	***	***
Nonsubject sources	End users	***	***	***	***	***
All import sources	Distributors	***	***	***	***	***
All import sources	Retailers	***	***	***	***	***
All import sources	End users	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

**Table 2.3 Fresh winter strawberries: Share of national U.S. shipments by source, channel of distribution, and period**

Shares in percent; interim is January through September

Source	Channel	2022	2023	2024	Interim 2024	Interim 2025
U.S. producers	Distributors	***	***	***	***	***
U.S. producers	Retailers	***	***	***	***	***
U.S. producers	End users	***	***	***	***	***
Mexico	Distributors	***	***	***	***	***
Mexico	Retailers	***	***	***	***	***
Mexico	End users	***	***	***	***	***
Nonsubject sources	Distributors	***	***	***	***	***
Nonsubject sources	Retailers	***	***	***	***	***
Nonsubject sources	End users	***	***	***	***	***
All import sources	Distributors	***	***	***	***	***
All import sources	Retailers	***	***	***	***	***
All import sources	End users	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

## Geographic distribution

U.S. producers and importers reported selling fresh winter strawberries to all regions in the contiguous United States, as shown in table 2.4.<sup>3</sup> Within-region U.S. producers reported \*\*\* percent of sales were within 100 miles of their production facilities, \*\*\* percent of sales were within 101 to 1,000 miles, and \*\*\* percent of sales were over 1,000 miles from production facilities. National producers reported \*\*\* percent of sales were within 100 miles of production facilities, \*\*\* percent within 101 and 1,000 miles, and \*\*\* percent over 1,000 miles of production facilities. Importers reported \*\*\* percent of sales were within 100 miles of facilities, \*\*\* percent within 101 to 1,000 miles, and \*\*\* percent of sales over 1,000 miles from facilities.

<sup>3</sup> The Commission requested U.S. producers and importers report U.S. shipments by state.

**Table 2.4 Fresh winter strawberries: Count of U.S. producers' and U.S. importers' geographic markets for U.S. shipments, by region**

Count in number of firms reporting

Region	Within region U.S producers: Count	National U.S. producers: Count	Subject U.S. importers: Count
Within region	17	19	10
Out-of-region	7	23	10
All regions	17	33	11

Source: Compiled from data submitted in response to Commission questionnaires.

## Supply and demand considerations

### U.S. supply

Table 2.5 provides a summary of the supply factors regarding fresh winter strawberries from U.S. producers and from Mexico.

**Table 2.5 Fresh winter strawberries: Supply factors that affect the ability to increase shipments to the U.S. market, by country**

Quantity in 1,000 pounds; Ratio and shares in percent

Factor	Measure	Within region U.S. producers	National U.S. producers	Mexico
Production: All year strawberries 2022	Quantity	***	***	***
Production: All year strawberries 2024	Quantity	***	***	***
Production: Fresh winter strawberries 2022	Quantity	***	***	***
Production: Fresh winter strawberries 2024	Quantity	***	***	***
Production: Fresh winter strawberries 2022	Share (of all strawberries production)	***	***	***
Production: Fresh winter strawberries 2024	Share (of all strawberries production)	***	***	***
Home market shipments 2024	Share	***	***	***
Non-U.S. export market shipments 2024	Share	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Responding U.S. producers accounted for just under half (47.5 percent) of U.S. production of fresh winter strawberries in 2024. Responding foreign producer/exporter firms accounted for majority (57.9 percent) of U.S. imports of fresh winter strawberries from Mexico during 2024. For additional data on the number of responding firms and their share of U.S. production and of U.S. imports from each subject country, please refer to Parts 3 and 7.

## **Domestic production**

Based on available information, within region U.S. producers of fresh winter strawberries have the ability to respond to changes in demand with small changes in the quantity of shipments of U.S.-produced fresh winter strawberries to the U.S. market. The main contributing factors to this degree of responsiveness of supply are the limited increase in production of fresh winter strawberries between 2022 and 2024, lack of inventories due to fresh winter strawberries being a perishable product, and high home market shipments. National (within and out of region) U.S. producers have the ability to respond to changes in demand with small to moderate changes in the quantity of shipments of fresh winter strawberries to the U.S. market. The main factor contributing to this degree of responsiveness of supply is the increased production of fresh winter strawberries between 2022 and 2024. The main factors limiting the responsiveness of supply include a lack of inventories and high home market shipments.

During the preliminary conference, parties disagreed regarding available U.S. capacity. Petitioner’s counsel reported that within-region U.S. producers have available farmland to increase domestic production, but the cost of developing it is “significant.”<sup>4</sup> Out-of-region U.S. producers stated that demand for strawberries in the United States is year-round, and that imports “help maintain consistent availability during periods when Florida and California cannot meet U.S. demand.”<sup>5</sup>

## **Subject imports from Mexico**

Based on available information, producers of fresh winter strawberries from Mexico have the ability to respond to changes in demand with moderate changes in the quantity of shipments of fresh winter strawberries to the U.S. market. The main contributing factors to this degree of responsiveness of supply are increasing production between 2022 and 2024, limited home market shipments, and limited non-U.S. export market shipments. A factor mitigating this responsiveness of supply includes a lack of inventories.

## **Imports from nonsubject sources**

Nonsubject imports accounted for 1.2 percent of total within region U.S. imports in 2024. The largest source of nonsubject imports during January 2022 to September 2025 was Canada.

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<sup>4</sup> Conference transcript, p. 107 (Parker).

<sup>5</sup> Conference transcript, p. 150 (Mathieson).

## Supply constraints

Thirty U.S. producers and four importers reported that they had not experienced supply constraints since January 1, 2022. However, six U.S. producers and seven importers did report such constraints. Of those U.S. producers, three reported constraints in 2022, four in 2023, six in 2024, and five in interim 2025. Constraints reported by domestic producers included weather disruptions, limited capacity from within-region producers to supply U.S. demand in winter months, and disease issues affecting plants. Of those importers that reported supply constraints, four reported constraints occurred during 2022, 2023, and interim 2025, and six reported supply constraints in 2024. These supply constraints were described as occurring due to weather disruptions and, in 2024, a period of decreased production of fresh winter strawberries in Mexico and Florida. Table 2.6 shows within-region producers', national U.S. producers', and importers' responses indicating yearly supply constraints.

**Table 2.6 Fresh winter strawberries: Count of firms' responses regarding timing of supply constraints, by firm type and period**

Period of constraint	Within region U.S. producers	National U.S. producers	Importers
2022	1	3	4
2023	2	4	4
2024	4	6	6
Interim 2025	3	5	4

Source: Compiled from data submitted in response to Commission questionnaires.

## U.S. demand

Based on available information, the overall demand for fresh winter strawberries is likely to experience moderate changes in response to changes in price. The main contributing factor is the nature of strawberries as a discretionary consumer item.

## End uses and cost share

All responding firms reported that fresh winter strawberries are sold as is commercially for retail consumption, and not as part of a downstream product.

## Business cycles

Twenty-four of 35 U.S. producers (12 of 16 within-region and out of 19 out-of-region) and five of 11 importers indicated that the market was subject to business cycles. Specifically, producers within and out of region noted that there are seasonal cycles driven by farms' planting and harvest schedules and that customer purchases increase around holidays.

Importers reported similar business cycles. The remaining U.S. producers and importers indicated there were not business cycles.

### **Demand trends**

Most firms reported a steady increase in U.S. demand for fresh winter strawberries since January 1, 2022 (table 2.7). While a majority of U.S producers reported overall increased demand, four firms indicated that domestic demand has fluctuated down or decreased. Producer \*\*\* reported that demand has been affected by inflationary pressures on consumers, shifts in retail buying patterns, and increased availability of imported product at lower price points. Importers \*\*\* reported that demand has increased and remained strong, with \*\*\* adding that demand had increased following the COVID-19 pandemic due to a “push towards healthier lifestyles”.

**Table 2.7 Fresh winter strawberries: Count of firms' responses regarding overall domestic and foreign demand, by firm type**

Count in number of firms reporting

Market	Firm type	Steadily Increase	Fluctuate Up	No change	Fluctuate Down	Steadily Decrease
Domestic demand: Within region	U.S. producers: Located within region	6	0	1	2	2
Domestic demand: Within region	U.S. producers: Located out-of-region	18	0	0	0	0
Domestic demand: Within region	All U.S. producers	24	0	1	2	2
Domestic demand: Within region	Importers	5	1	3	1	0
Domestic demand: Overall	U.S. producers: Located within region	6	0	0	2	1
Domestic demand: Overall	U.S. producers: Located out-of-region	18	0	0	0	0
Domestic demand: Overall	All U.S. producers	24	0	0	2	1
Domestic demand: Overall	Importers	5	3	2	0	0
Foreign demand	U.S. producers: Located within region	2	2	1	1	0
Foreign demand	U.S. producers: Located out-of-region	1	17	0	0	0
Foreign demand	All U.S. producers	3	19	1	1	0
Foreign demand	Importers	2	2	2	0	0

Source: Compiled from data submitted in response to Commission questionnaires.

### Substitute products

Substitutes for fresh winter strawberries are very limited. Most responding firms reported that there were no substitutes. Of the few exceptions, importers \*\*\* stated other berries, table grapes, or frozen strawberries are substitutes.

### Substitutability issues

This section assesses the degree to which U.S.-produced fresh winter strawberries and imports of fresh winter strawberries from Mexico can be substituted for one another by examining the importance of certain purchasing factors and the comparability of fresh winter strawberries from domestic and imported sources based on those factors. Based on available data, staff believes that there is a high degree of substitutability between domestically produced fresh winter strawberries and fresh winter strawberries imported from subject

sources.<sup>6</sup> Factors contributing to this level of substitutability include similar quality, similarities between domestically produced and imported fresh winter strawberries, availability, and limited preference for particular country of origin or producers. Factors reducing this substitutability include the significant factors other than price that firms consider, including somewhat limited availability during certain seasons. Additional information, such as the importance of locally produced fresh winter strawberries to purchasers, may affect this substitutability rating.

## Factors affecting purchasing decisions

### Most important purchase factors

Purchasers responding to lost sales lost revenue allegations<sup>7</sup> were asked to identify the main purchasing factors their firm considered in their purchasing decisions for fresh winter strawberries.

The most often cited top factors firms consider in their purchasing decisions for fresh winter strawberries were quality (two firms), and on-time service (two firms), as shown in table 2.8. Product category strategy and quality were the most frequently cited first-most important factor (cited by one firm each). Quality and volume were the most frequently reported second-most important factor (one firm each); and on-time service was the most frequently reported third-most important factor (two firms).

**Table 2.8 Fresh winter strawberries: Count of ranking of factors used in purchasing decisions as reported by purchasers, by factor**

Factor	First	Second	Third	Total
Category strategy	***	***	***	***
Quality	***	***	***	***
On-time service	***	***	***	***
All other factors	***	***	***	NA

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Other factors include price and volume.

<sup>6</sup> The degree of substitution between domestic and imported fresh winter strawberries depends upon the extent of product differentiation between the domestic and imported products and reflects how easily purchasers can switch from domestically produced fresh winter strawberries to the fresh winter strawberries imported from Mexico (or vice versa) when prices change. The degree of substitution may include such factors as quality differences (e.g., grade standards, defect rates, etc.), and differences in sales conditions (e.g., lead times between order and delivery dates, reliability of supply, product services, etc.).

<sup>7</sup> This information is compiled from responses by purchasers identified by Petitioner to the lost sales lost revenue allegations. See Part 5 for additional information.

Neither of the two responding purchasers reported that they always purchase the lowest-priced product.

### **Lead times**

Within-region U.S. producers reported that fresh winter strawberries are primarily sold from inventories (at 72.1 percent of shipments) rather than produced to order (at 27.9 percent of shipments), with firms reporting lead times of 5.6 days for shipments from inventories and 8.6 days when produced to order. National U.S. producers reported that most 78.1 percent of shipments were from U.S. inventories while 21.9 percent were produced to order, with reported lead times of 4.7 and 11.3 days for each. Importers reported that most of their commercial shipments were from U.S. inventories 70.5 percent, with lead times averaging 6.7 days. Importers' remaining 25.8 and 3.7 percent of commercial shipments were produced to order or from foreign inventories, with lead times averaging a period of 4.8 and 1.0 days, respectively.

### **Changes in purchasing patterns**

Purchasers were asked about changes in their purchasing patterns from different countries since January 1, 2022. Purchasers reported steadily increased purchases of U.S.-produced product due to company growth. Purchasers reported steadily increased purchases or purchases fluctuating up of product from Mexico for the same reasons. Purchaser \*\*\*, reported it did not change purchases from nonsubject suppliers, stating that its purchases of nonsubject product were “not significant” and for “trial” purposes.

### **Comparison of U.S.-produced and imported fresh winter strawberries**

In order to determine whether U.S.-produced fresh winter strawberries can generally be used in the same applications as imports from Mexico, U.S. producers and importers were asked whether the products can always, frequently, sometimes, or never be used interchangeably. As shown in tables 2.9 and 2.10, most within-region producers and importers reported that fresh winter strawberries from the United States and Mexico always or frequently interchangeable. Two within-region U.S producers, \*\*\* reported that their fresh winter strawberries are grown in a protected agriculture facility, while fresh winter strawberries imported from Mexico are field grown. A majority of national U.S. producers reported that fresh winter strawberries from Mexico are sometimes interchangeable with those from the United States, with several firms reporting that U.S. customers “prefer local berries,” but sometimes are willing to purchase berries from Mexico.

**Table 2.9 Fresh winter strawberries: Count of U.S. producers reporting the interchangeability between product produced in the United States and in other countries, by U.S. producer type and country pair**

Country pair	U.S. producer type	Always	Frequently	Sometimes	Never
U.S. vs. Mexico	Within region U.S. producers	9	1	4	0
U.S. vs. Other	Within region U.S. producers	0	1	2	0
Mexico vs. Other	Within region U.S. producers	0	1	2	0
U.S. vs. Mexico	National U.S. producers	9	1	15	0
U.S. vs. Other	National U.S. producers	0	1	2	0
Mexico vs. Other	National U.S. producers	0	1	2	0

Source: Compiled from data submitted in response to Commission questionnaires.

**Table 2.10 Fresh winter strawberries: Count of importers reporting the interchangeability between product produced in the United States and in other countries, by country pair**

Country pair	Always	Frequently	Sometimes	Never
U.S. vs. Mexico	6	2	3	0
U.S. vs. Other	2	0	4	0
Mexico vs. Other	3	1	2	0

Source: Compiled from data submitted in response to Commission questionnaires.

In addition, U.S. producers and importers were asked to assess how often differences other than price were significant in sales of fresh winter strawberries from the United States, subject, or nonsubject countries, shown in tables 2.11 and 2.12. Most within region and out-of-region producers reported that there are never or only sometimes differences other than price between domestically produced fresh winter strawberries and subject imports from Mexico, with firms citing quality and availability as differences. A bare majority of U.S. importers reported that there are always or frequently differences other than price between the domestic product and subject imports, with importer \*\*\* reporting that customers “often prefer domestically grown strawberries.

**Table 2.11 Fresh winter strawberries: Count of U.S. producers reporting the significance of differences other than price between product produced in the United States and in other countries, by U.S. producer type and country pair**

Country pair	U.S. producer type	Always	Frequently	Sometimes	Never
U.S. vs. Mexico	Within region U.S. producers	2	0	5	8
U.S. vs. Other	Within region U.S. producers	2	0	2	0
Mexico vs. Other	Within region U.S. producers	1	0	2	0
U.S. vs. Mexico	National U.S. producers	3	0	16	8
U.S. vs. Other	National U.S. producers	3	0	2	0
Mexico vs. Other	National U.S. producers	1	0	2	0

Source: Compiled from data submitted in response to Commission questionnaires.

**Table 2.12 Fresh winter strawberries: Count of importers reporting the significance of differences between product produced in the United States and in other countries, by country pair**

Country pair	Always	Frequently	Sometimes	Never
U.S. vs. Mexico	5	1	5	0
U.S. vs. Other	4	0	3	0
Mexico vs. Other	2	1	3	0

Source: Compiled from data submitted in response to Commission questionnaires.



## Part 3: U.S. producers' production, shipments, and employment

The Commission analyzes a number of factors in making injury determinations (see 19 U.S.C. §§ 1677(7)(B) and 1677(7)(C)). Information on the dumping margins was presented in Part 1 of this report and information on the volume and pricing of imports of the subject merchandise is presented in Part 4 and Part 5. Information on the other factors specified is presented in this section and/or Part 6 and (except as noted) is based on the questionnaire responses of 39 firms that accounted for 47.5 percent of national U.S. production of all fresh strawberries during 2024.<sup>1 2</sup>

### U.S. producers

The Commission issued a U.S. producer questionnaire to 134 firms based on information contained in the petition and staff research, and 39 firms provided usable data on their operations.<sup>3</sup> Table 3.1 lists U.S. producers of fresh winter strawberries, their production locations, positions on the petition, and shares of total production.

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<sup>1</sup> The coverage estimate is calculated by comparing production data as reported in questionnaires for 2024 to production data for 2024 as reported by the U.S. Department of Agriculture National Agricultural Statistics Service. See table 3.11.

<sup>2</sup> Part 3 uses the following terms: winter (the period covering October 1 through March 31), non-winter (the period covering April 1 through September 30), within region (states east of the Mississippi River plus Louisiana and Texas), out-of-region (states west of the Mississippi River excluding Louisiana and Texas), and national (all U.S. states). The petition defined the scope as covering all fresh and chilled winter strawberries from Mexico harvested or entered during the period October 1 through March 31, whereas the scope defined by Commerce defines the winter period as November 1 through March 31. Data presented in this report uses the petition winter period scope definition of October 1 through March 31.

<sup>3</sup> Driscoll's submitted two U.S. producer questionnaires for its within region operations and its out-of-region operations. The company is a marketer/distributor that engages third party independent growers who harvest and pack fresh strawberries. \*\*\*.

**Table 3.1 Fresh winter strawberries: U.S. producers, their position on the petition, location of production, and share of reported production, 2024**

<b>Firm</b>	<b>Position on petition</b>	<b>Production location(s)</b>	<b>Within region: Share of production</b>	<b>National: Share of production</b>
Arias	***	Ventura, CA Oxnard, CA	***	***
Astin	Petitioner	Plant City, FL Wimauma, FL	***	***
Aurora	***	Ventura, CA Oxnard, CA	***	***
BBI	Petitioner	Dover, FL	***	***
Berry Patches	***	Dover, FL	***	***
Bibian	***	Ventura, CA Oxnard, CA	***	***
Driscoll's CA	***	Watsonville, CA	***	***
Driscoll's FL	***	Tampa, FL	***	***
El Camino	***	Salinas, CA	***	***
Farm N 4 U	***	Plant City, FL	***	***
Florida Pacific	***	Dover, FL Plant City, FL	***	***
G&F and Franberry	***	Plant City FL	***	***
Green Empire	***	Oneida, NY	***	***
Grimes	Petitioner	Plant City, FL Kathleen, FL Ft. Meade, FL	***	***
Guayabito	***	Ventura, CA Oxnard, CA	***	***
J&E Berry	***	Ventura, CA Oxnard, CA	***	***
JAL Berry	***	Salinas, CA Moss Landing, CA Watsonville, CA	***	***
La Joya	***	Oxnard, CA	***	***
Laguna	***	Ventura, CA Oxnard, CA Moorpark, CA	***	***
Mathis	Petitioner	Plant City, FL	***	***
Moderna	***	Oxnard, CA	***	***
Nature Fresh	***	Delta, OH	***	***
Ohio Greenhouse	***	Wapakoneta, OH	***	***

Table continued.

**Table 3.1 (Continued) Fresh winter strawberries: U.S. producers, their position on the petition, location of production, and share of reported production, 2024**

Firm	Position on petition	Production location(s)	Within region: Share of production	National: Share of production
Parkesdale	***	Dover, FL	***	***
Premier Berry	***	Oxnard, CA	***	***
Reiter Berry	***	Watsonville, CA	***	***
Reiter Bros.	***	Ventura, CA Camarillo, CA Carpinteria, CA Oxnard, CA	***	***
Reiter Pacific	***	Santa Maria, CA	***	***
River Valley	***	Salinas, CA Watsonville, CA	***	***
San Antonio	***	Oxnard, CA	***	***
Seaboard	***	Wimauma, FL	***	***
Sierra	***	Moss Landing, CA Oxnard, CA Nipomo, CA	***	***
Simmons	Petitioner	Plant City, FL Dover, FL	***	***
Sizemore	Petitioner	Plant City, FL	***	***
Sweet Life	Petitioner	Plant City, FL	***	***
Total Ag Care	***	Mount Dora, FL Eustis, FL Williston, FL	***	***
Ultra Farms	Petitioner	Wimauma, FL	***	***
Valle El Paraiso	***	Santa Maria, CA	***	***
Wish Farms (G&D Farms)	***	Duette, FL	***	***
All firms	Various	Various	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Table 3.2 groups U.S. producers' positions on the petition by within region production shares (i.e., Florida, New York, and Ohio producers) and national production shares (i.e., also including the California producers).

**Table 3.2 Fresh winter strawberries: U.S. producers share of reported production, by their position on the petition, 2024**

Position on petition	Within region: Share of production	National: Share of production
Oppose	37.2	71.8
Petitioner and/or support	57.8	26.0
No position	5.0	2.3
All positions on petition	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.



**Table 3.3 (Continued) Fresh winter strawberries: U.S. producers' ownership, related and/or affiliated firms**

Reporting firm and location	Relationship type and related firm	Details of relationship
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Table 3.4 presents events in the U.S. industry since January 1, 2022.

**Table 3.4 Fresh winter strawberries: Important industry events since 2022**

Item	Firm	Event
Expansion	Driscoll's	In September 2022, indoor vertical-farm company Plenty Unlimited Inc. announced plans to build the world's largest indoor vertical farming campus in Virginia, where they will grow the first indoor, vertically-farmed strawberries at scale for Driscoll's.
New product	Wish Farms	In the fall of 2022, University of Florida developed a new, premium all-white strawberry variety called the "Florida Pearl;" Florida-based berry firm Wish Farms shortly after trademarked the variety as "Pink-A-Boo." The variety is grown on their California-based farms.
Weather conditions	—	In 2023, heavy rains and flooding in California impacted the state's strawberry growing season, pushing back the peak harvest season of Central California's strawberries from May to June.
New product	—	In April 2023, the University of California, Davis, released five new strawberry varieties that are resistant to the Fusarium wilt disease, one of the most common reasons for crop loss.

Item	Firm	Event
Expansion	Nature Fresh Farms	In July 2023, Nature Fresh Farms, a Canadian-based firm, announced it has completed adding 45 acres to its greenhouse growing facility in Delta, Ohio, to produce organic strawberries; Nature Fresh Farms also announced an expansion of 60,000 square feet to its Ohio facility by opening a new distribution center.
Weather conditions	—	In August 2023, Hurricane Idalia made landfall in Florida, affecting western-central and northern Florida; an estimated 3.5 million acres of agricultural lands were affected, with estimated production losses at \$276 million across all products.
Acquisition	Frutura	In October 2023, California-based fruit sales and marketing company Frutura acquired two berry growers, U.S.-based Sun Belle and Chilean-based Giddings Fruit.
Opening	Oishii	In June 2024, U.S. vertical farming strawberry grower Oishii opened a 237,500-square-foot indoor vertical strawberry farm in New Jersey to help expand its premium strawberry production; the firm already had a 72,000-square-foot strawberry growing facility in Jersey City, New Jersey.
Weather conditions	—	In September 2024, Hurricane Helene made landfall in Florida, impacting southwestern and north-central Florida; an estimated 6.2 million acres of agricultural lands were affected, with estimated production losses at \$116.5 million across all products.
Weather conditions	—	In October 2024, Hurricane Milton made landfall in Florida, impacting western and central Florida; an estimated 5.7 million acres of agricultural lands were affected, with estimated production losses at \$428.0 million across all products. Strawberry fields were reportedly affected by crown rot disease, which was spread by the hurricane.
Expansion	Naturipe Farms	In October 2024, California-based berry producer Naturipe Farms announced it was adding 200 acres to its strawberry growing facilities in Florida.
Expansion	Oishii	In November 2024, Oishii announced it raised close to \$150 million in a Series B funding round. This is after the firm raised \$134 million in February 2024 during a previous round of Series B funding.
Legal dispute	Driscoll's	In May 2025, California-based berry producer Driscoll's appealed the U.S. District Court ruling in favor of California Berry Cultivars; the lawsuit stems from allegations that California Berry Cultivars infringed Driscoll's patents on four of its strawberry varieties and interfered with Driscoll's contracts with nurseries and breeders.
Expansion	Sun Belle	In October 2025, Illinois-based berry firm Sun Belle announced new partnerships with growers in central Florida to offer Florida-grown strawberries in the winter and complement its production in Mexico.
Expansion	Oppy	In December 2025, Canadian-based produce firm Oppy launched a new Florida strawberry growing program on more than 300 acres to expand its winter volume of strawberries.

Sources: FreshPlaza, "New white strawberry variety targets year-round supply," <https://www.freshplaza.com/north-america/article/9497566/new-white-strawberry-variety-targets-year-round-supply/>, retrieved February 13, 2026; Strailey, "Wish Farms expects strong supply of Pink-A-Boo Pineberries," <https://www.thepacker.com/news/products/wish-farms-expects-strong-supply-pink-boo-pineberries>, retrieved February 13, 2026; Produce Grower, "Nature Fresh Farms adds organic strawberry to its berry line," <https://www.producegrower.com/news/nature-fresh-farms-organic-strawberry/>, retrieved February 13, 2026; FreshPlaza, "Nature Fresh Farms doubles Ohio operations with more organic acreage," <https://www.freshplaza.com/north-america/article/9354270/nature-fresh-farms-doubles-ohio-operations-with-more-organic-acreage/>, retrieved February 13, 2026; The Packer, "Nature Fresh Farms to open new distribution center," <https://www.thepacker.com/news/industry/nature-fresh-farms-open-new-distribution-center>, retrieved February 13, 2026; The Packer, "Naturipe Farms expands into Florida with 200 acres of strawberries," <https://www.thepacker.com/news/produce-crops/naturipe-farms-expands-florida-200-acres-strawberries>, retrieved February 13, 2026; University of Florida, *Agricultural Losses and Damages from Hurricane Helene*, <https://fred.ifas.ufl.edu/media/fredifasufledu/economic-impact-analysis/reports/FRE-Hurricane-Helene-EIAP-Summary-Final.pdf>, retrieved February 13, 2026; University of Florida, *Agricultural Losses and Damages from Hurricane Milton*, <https://fred.ifas.ufl.edu/media/fredifasufledu/economic-impact-analysis/reports/FRE-Hurricane-Milton-EIAP-Summary-Final.pdf>, retrieved February 13, 2026; University of Florida, *County-Level Agricultural Losses from Hurricane Idalia*, [https://fred.ifas.ufl.edu/media/fredifasufledu/economic-impact-analysis/reports/FRE-Hurricane-Idaila-County-Level-Factsheet-2025-\(1\).pdf](https://fred.ifas.ufl.edu/media/fredifasufledu/economic-impact-analysis/reports/FRE-Hurricane-Idaila-County-Level-Factsheet-2025-(1).pdf), retrieved February 13, 2026; AG Information Network, "Strawberry Disease Spread by Hurricane and Working with Mexico on Screwworm," <https://www.aginfo.net/report/62696/The-Agribusiness-Update/Strawberry-Disease-Spread-by-Hurricane-and-Working-with-Mexico-on-Screwworm>, retrieved February 13, 2026; Produce Pay, "Mexico benefits from California's delayed strawberry season," <https://producepay.com/resources/mexico-benefits-from-californias-delayed-strawberry-season/>, retrieved February 13, 2026; Produce Pay, "Heavy rains damage strawberry crops in California," <https://producepay.com/resources/heavy-rains-damage-strawberry-crops-in-california/>, retrieved February 13, 2026; The Packer, "Sun Belle to Offer Florida Winter Strawberries," <https://www.thepacker.com/news/retail/sun-belle-offer-florida-winter-strawberries>, retrieved February 13, 2026; The Packer, "Oppy Launches Dole-Branded Florida Strawberry Program," <https://www.thepacker.com/news/opy-launches-dole-branded-florida-strawberry-program>, retrieved February 13, 2026; Lore, "Driscoll's heads to Virginia to grow strawberries in world's largest indoor vertical farm," <https://www.thepacker.com/news/packer-tech/driscolls-heads-virginia-grow-strawberries-worlds-largest-indoor-vertical-farm>, retrieved February 13, 2026; Herrick, "Oishii raises \$150M in Series B funding," <https://www.thepacker.com/news/industry/oishii-raises-150m-series-b-funding>, retrieved February 13, 2026; Gonzalez, "Oishii raises \$134M in Series B funding," <https://www.thepacker.com/news/industry/oishii-raises-134m-series-b-funding>, retrieved February 13, 2026; Hardy, "Oishii touts automation, sustainability at new indoor vertical strawberry farm," <https://www.thepacker.com/news/sustainability/oishii-touts-automation-sustainability-new-indoor-vertical-strawberry-farm>, retrieved February 13, 2026; The Packer, "California Berry Cultivars responds to Driscoll's legal challenge," <https://www.thepacker.com/news/industry/california-berry-cultivars-responds-driscolls-legal-challenge>, retrieved February 13, 2026; The Packer, "UC Davis releases 5 strawberry varieties resistant to deadly fungal disease," <https://www.thepacker.com/news/produce-crops/uc-davis-releases-5-strawberry-varieties-resistant-deadly-fungal-disease>, retrieved February 13, 2026; Lore, "Frutera acquires Sun Belle and Giddings Fruits, advancing berry business," <https://www.thepacker.com/news/industry/frutera-acquires-sun-belle-and-giddings-fruits-advancing-berry-business>, retrieved February 13, 2026.

Producers in the United States were asked to report any change in the character of their operations or organization relating to the production of fresh winter strawberries since 2022. Table 3.5 presents counts of change types identified by these producers by region, and table 3.6 presents the narrative responses for the reported operational changes.

**Table 3.5 Fresh winter strawberries: U.S. producers' count of reported changes in operations since January 1, 2022, by producer region and type of change in operation**

Count in number of firms reporting

Type of change	Within region U.S. producers	Out-of-region U.S. producers	All U.S. producers
New acreage planted	11	10	21
Acreage replaced with new plants	12	14	26
Acreage taken out of production	10	14	24
Packing and/or chilling operation openings	1	0	1
Packing and/or chilling operation closings	0	0	0
Weather related events	16	1	17
Disease or pest-related events	6	0	6
Changes in labor availability or costs	11	0	11
Other	1	0	1
Any change	19	15	34

Source: Compiled from data submitted in response to Commission questionnaires.

**Table 3.6 Fresh winter strawberries: U.S. producers' reported changes in operations, since January 1, 2022**

Type of change	Region	Firm name and narrative response on changes in operations
New acreage planted	Within Region	***
New acreage planted	Within Region	***
New acreage planted	Within Region	***
New acreage planted	Within Region	***
New acreage planted	Within Region	***
New acreage planted	Within Region	***
New acreage planted	Within Region	***
New acreage planted	Within Region	***
New acreage planted	Within Region	***
New acreage planted	Within Region	***
New acreage planted	Within Region	***
New acreage planted	Out-of-Region	***
New acreage planted	Out-of-Region	***
New acreage planted	Out-of-Region	***

Type of change	Region	Firm name and narrative response on changes in operations
New acreage planted	Out-of-Region	***
New acreage planted	Out-of-Region	***
New acreage planted	Out-of-Region	***
New acreage planted	Out-of-Region	***
New acreage planted	Out-of-Region	***
New acreage planted	Out-of-Region	***
Acreage replaced with new plants	Within Region	***
Acreage replaced with new plants	Within Region	***
Acreage replaced with new plants	Within Region	***
Acreage replaced with new plants	Within Region	***
Acreage replaced with new plants	Within Region	***
Acreage replaced with new plants	Within Region	***
Acreage replaced with new plants	Within Region	***
Acreage replaced with new plants	Within Region	***
Acreage replaced with new plants	Within Region	***
Acreage replaced with new plants	Within Region	***
Acreage replaced with new plants	Within Region	***
Acreage replaced with new plants	Within Region	***
Acreage replaced with new plants	Within Region	***
Acreage replaced with new plants	Out-of-Region	***
Acreage replaced with new plants	Out-of-Region	***
Acreage replaced with new plants	Out-of-Region	***
Acreage replaced with new plants	Out-of-Region	***
Acreage replaced with new plants	Out-of-Region	***
Acreage replaced with new plants	Out-of-Region	***
Acreage replaced with new plants	Out-of-Region	***
Acreage replaced with new plants	Out-of-Region	***
Acreage replaced with new plants	Out-of-Region	***

Type of change	Region	Firm name and narrative response on changes in operations
Acreage replaced with new plants	Out-of-Region	***
Acreage replaced with new plants	Out-of-Region	***
Acreage replaced with new plants	Out-of-Region	***
Acreage replaced with new plants	Out-of-Region	***
Acreage replaced with new plants	Out-of-Region	***
Acreage replaced with new plants	Out-of-Region	***
Acreage replaced with new plants	Out-of-Region	***
Acreage replaced with new plants	Out-of-Region	***
Acreage taken out of production	Within Region	***
Acreage taken out of production	Within Region	***
Acreage taken out of production	Within Region	***
Acreage taken out of production	Within Region	***
Acreage taken out of production	Within Region	***
Acreage taken out of production	Within Region	***
Acreage taken out of production	Within Region	***
Acreage taken out of production	Within Region	***
Acreage taken out of production	Within Region	***
Acreage taken out of production	Out-of-Region	***
Acreage taken out of production	Out-of-Region	***

Type of change	Region	Firm name and narrative response on changes in operations
Acreage taken out of production	Out-of-Region	***
Acreage taken out of production	Out-of-Region	***
Acreage taken out of production	Out-of-Region	***
Acreage taken out of production	Out-of-Region	***
Acreage taken out of production	Out-of-Region	***
Acreage taken out of production	Out-of-Region	***
Acreage taken out of production	Out-of-Region	***
Acreage taken out of production	Out-of-Region	***
Acreage taken out of production	Out-of-Region	***
Acreage taken out of production	Out-of-Region	***
Acreage taken out of production	Out-of-Region	***
Acreage taken out of production	Out-of-Region	***
Acreage taken out of production	Out-of-Region	***
Packing and/or chilling operation openings	Within Region	***
Weather related events	Within Region	***
Weather related events	Within Region	***
Weather related events	Within Region	***
Weather related events	Within Region	***
Weather related events	Within Region	***

Type of change	Region	Firm name and narrative response on changes in operations
Weather related events	Within Region	***
Weather related events	Within Region	***
Weather related events	Within Region	***
Weather related events	Within Region	***
Weather related events	Within Region	***
Weather related events	Within Region	***
Weather related events	Within Region	***
Weather related events	Within Region	***
Weather related events	Within Region	***
Weather related events	Within Region	***
Weather related events	Within Region	***
Weather related events	Out-of-Region	***
Disease or pest-related events	Within Region	***
Disease or pest-related events	Within Region	***
Disease or pest-related events	Within Region	***
Disease or pest-related events	Within Region	***
Disease or pest-related events	Within Region	***
Disease or pest-related events	Within Region	***
Changes in labor availability or costs	Within Region	***
Changes in labor availability or costs	Within Region	***
Changes in labor availability or costs	Within Region	***
Changes in labor availability or costs	Within Region	***
Changes in labor availability or costs	Within Region	***

Type of change	Region	Firm name and narrative response on changes in operations
Changes in labor availability or costs	Within Region	***
Changes in labor availability or costs	Within Region	***
Changes in labor availability or costs	Within Region	***
Changes in labor availability or costs	Within Region	***
Changes in labor availability or costs	Within Region	***
Changes in labor availability or costs	Within Region	***
Other	Within Region	***

Source: Compiled from data submitted in response to Commission questionnaires.

## U.S. production, acres planted, and yields

### Monthly production data by market and season (in-scope and expanded scope)

Table 3.7 and figure 3.1 detail monthly U.S. national strawberry production volumes and market shares, categorized by their alignment with the petition’s scope as reported in questionnaire data:

- **Matching scope definition (Fresh Winter):** Strawberries harvested for the fresh market from October 1 through March 31.
- **Out-of-Scope (Fresh Non-Winter):** Strawberries harvested for the fresh market from April 1 through September 30. As shown, greater volumes of strawberry production were generally reported in the non-winter months.
- **Out-of-Scope (Processed/Frozen):** Strawberries harvested for the U.S. producers’ own freezing or processing operations at any time of year. As shown, the vast majority of reported production was harvested for the fresh market regardless of season.

**Table 3.7 All strawberries: U.S. producers' monthly production, by product type, market and month**

Quantity in 1,000 pounds

Year	Month	Product type	Own processing or freezing	Fresh market / first level of sale	All reported U.S. production
2022	January	Winter	***	***	***
2022	February	Winter	***	***	***
2022	March	Winter	***	***	***
2022	April	Non-winter	***	***	***
2022	May	Non-winter	***	***	***
2022	June	Non-winter	***	***	***
2022	July	Non-winter	***	***	***
2022	August	Non-winter	***	***	***
2022	September	Non-winter	***	***	***
2022	October	Winter	***	***	***
2022	November	Winter	***	***	***
2022	December	Winter	***	***	***
2023	January	Winter	***	***	***
2023	February	Winter	***	***	***
2023	March	Winter	***	***	***
2023	April	Non-winter	***	***	***
2023	May	Non-winter	***	***	***
2023	June	Non-winter	***	***	***
2023	July	Non-winter	***	***	***
2023	August	Non-winter	***	***	***
2023	September	Non-winter	***	***	***
2023	October	Winter	***	***	***
2023	November	Winter	***	***	***
2023	December	Winter	***	***	***

Table continued

**Table 3.7 (Continued) All strawberries: U.S. producers' monthly production, by product type, market and month**

Quantity in 1,000 pounds

Year	Month	Product type	Own processing or freezing	Fresh market / first level of sale	All reported U.S. production
2024	January	Winter	***	***	***
2024	February	Winter	***	***	***
2024	March	Winter	***	***	***
2024	April	Non-winter	***	***	***
2024	May	Non-winter	***	***	***
2024	June	Non-winter	***	***	***
2024	July	Non-winter	***	***	***
2024	August	Non-winter	***	***	***
2024	September	Non-winter	***	***	***
2024	October	Winter	***	***	***
2024	November	Winter	***	***	***
2024	December	Winter	***	***	***
2025	January	Winter	***	***	***
2025	February	Winter	***	***	***
2025	March	Winter	***	***	***
2025	April	Non-winter	***	***	***
2025	May	Non-winter	***	***	***
2025	June	Non-winter	***	***	***
2025	July	Non-winter	***	***	***
2025	August	Non-winter	***	***	***
2025	September	Non-winter	***	***	***

Table continued.

**Table 3.7 (Continued) All strawberries: U.S. producers' monthly production, by product type, market and month**

Share across in percent

Year	Month	Product type	Own processing or freezing	Fresh market / first level of sale	All reported U.S. production
2022	January	Winter	***	***	100.0
2022	February	Winter	***	***	100.0
2022	March	Winter	***	***	100.0
2022	April	Non-winter	***	***	100.0
2022	May	Non-winter	***	***	100.0
2022	June	Non-winter	***	***	100.0
2022	July	Non-winter	***	***	100.0
2022	August	Non-winter	***	***	100.0
2022	September	Non-winter	***	***	100.0
2022	October	Winter	***	***	100.0
2022	November	Winter	***	***	100.0
2022	December	Winter	***	***	100.0
2023	January	Winter	***	***	100.0
2023	February	Winter	***	***	100.0
2023	March	Winter	***	***	100.0
2023	April	Non-winter	***	***	100.0
2023	May	Non-winter	***	***	100.0
2023	June	Non-winter	***	***	100.0
2023	July	Non-winter	***	***	100.0
2023	August	Non-winter	***	***	100.0
2023	September	Non-winter	***	***	100.0
2023	October	Winter	***	***	100.0
2023	November	Winter	***	***	100.0
2023	December	Winter	***	***	100.0

Table continued

**Table 3.7 (Continued) All strawberries: U.S. producers' monthly production, by product type, market and month**

Share across in percent

Year	Month	Product type	Own processing or freezing	Fresh market / first level of sale	All reported U.S. production
2024	January	Winter	***	***	100.0
2024	February	Winter	***	***	100.0
2024	March	Winter	***	***	100.0
2024	April	Non-winter	***	***	100.0
2024	May	Non-winter	***	***	100.0
2024	June	Non-winter	***	***	100.0
2024	July	Non-winter	***	***	100.0
2024	August	Non-winter	***	***	100.0
2024	September	Non-winter	***	***	100.0
2024	October	Winter	***	***	100.0
2024	November	Winter	***	***	100.0
2024	December	Winter	***	***	100.0
2025	January	Winter	***	***	100.0
2025	February	Winter	***	***	100.0
2025	March	Winter	***	***	100.0
2025	April	Non-winter	***	***	100.0
2025	May	Non-winter	***	***	100.0
2025	June	Non-winter	***	***	100.0
2025	July	Non-winter	***	***	100.0
2025	August	Non-winter	***	***	100.0
2025	September	Non-winter	***	***	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “—”. Data include out-of-scope strawberries (reported whether or not fresh and whether or not winter).

**Figure 3.1 All strawberries: U.S. producers' monthly production, by market type and month**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires.

## Production shares

Table 3.8 details U.S. strawberry production and market shares during the investigation period, categorized by market type (fresh, processed, and all) and by harvest season (winter, non-winter, and all). The table illustrates the relative shares of fresh winter strawberry production (matching the petition scope definition) compared to the broader domestic production of strawberries produced for the fresh market in all seasons (Fresh: Winter strawberries: Share 1) as well as compared to domestic production of strawberries produced for the fresh and processed markets in all seasons (Fresh: Winter strawberries: Share 2) by period as reported in questionnaire data.

**Table 3.8 All strawberries: U.S. producers' overall strawberry production, by product type and period**

Quantity in 1,000 pounds; Share in percent; Interim period is January through September

Product type	Measure	2022	2023	2024	Interim 2024	Interim 2025
Fresh: Winter strawberries	Quantity	***	***	***	***	***
Fresh: All other strawberries	Quantity	***	***	***	***	***
Fresh: Total	Quantity	***	***	***	***	***
Processed: Winter strawberries	Quantity	***	***	***	***	***
Processed: All other strawberries	Quantity	***	***	***	***	***
Processed: Total	Quantity	***	***	***	***	***
All winter strawberries	Quantity	***	***	***	***	***
All non-winter strawberries	Quantity	***	***	***	***	***
All strawberries	Quantity	***	***	***	***	***
Fresh: Winter strawberries	Share 1	***	***	***	***	***
Fresh: All other strawberries	Share 1	***	***	***	***	***
Fresh: Total	Share 1	100.0	100.0	100.0	100.0	100.0
Processed: Winter strawberries	Share 1	***	***	***	***	***
Processed: All other strawberries	Share 1	***	***	***	***	***
Processed: Total	Share 1	100.0	100.0	100.0	100.0	100.0
Fresh: Winter strawberries	Share 2	***	***	***	***	***
Fresh: All other strawberries	Share 2	***	***	***	***	***
Fresh: Total	Share 2	***	***	***	***	***
Processed: Winter strawberries	Share 2	***	***	***	***	***
Processed: All other strawberries	Share 2	***	***	***	***	***
Processed: Total	Share 2	***	***	***	***	***
All winter strawberries	Share 2	***	***	***	***	***
All non-winter strawberries	Share 2	***	***	***	***	***
All strawberries	Share 2	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Share 1 is the share within the product groupings of fresh strawberries. Share 2 is the share of total strawberry production (both fresh and processed). Zeroes, null values, and undefined calculations are suppressed and shown as “—”.

## Fresh strawberry production data by month and region

Table 3.9 and figure 3.2 detail U.S. producers' monthly fresh strawberry production by season (winter and non-winter) and by region (within region, out-of-region, and total) as well as the market shares for each of these categories. Within region producers (e.g., Florida) reported the majority of production for the fresh market in the winter months, while out-of-region producers (i.e., California) reported the majority of production for the fresh market in the non-winter months, although all the winter months had at least some level of production reported by both within region and out-of-region producers. Within region producers' fresh winter strawberry production shares were highest in January and February with comparatively lower shares in October and November.

**Table 3.9 All fresh strawberries: U.S. producers' monthly production, by product type and location of producer**

Quantity in 1,000 pounds

Year	Month	Product type	U.S. producers: Within region	U.S. producers: Out-of-region	All U.S. producers
2022	January	Winter	***	***	***
2022	February	Winter	***	***	***
2022	March	Winter	***	***	***
2022	April	Non-winter	***	***	***
2022	May	Non-winter	***	***	***
2022	June	Non-winter	***	***	***
2022	July	Non-winter	***	***	***
2022	August	Non-winter	***	***	***
2022	September	Non-winter	***	***	***
2022	October	Winter	***	***	***
2022	November	Winter	***	***	***
2022	December	Winter	***	***	***
2023	January	Winter	***	***	***
2023	February	Winter	***	***	***
2023	March	Winter	***	***	***
2023	April	Non-winter	***	***	***
2023	May	Non-winter	***	***	***
2023	June	Non-winter	***	***	***
2023	July	Non-winter	***	***	***
2023	August	Non-winter	***	***	***
2023	September	Non-winter	***	***	***
2023	October	Winter	***	***	***
2023	November	Winter	***	***	***
2023	December	Winter	***	***	***

Table continued.

**Table 3.9 (Continued) All fresh strawberries: U.S. producers' monthly production, by product type and location of producer**

Quantity in 1,000 pounds

Year	Month	Product type	U.S. producers: Within region	U.S. producers: Out-of-region	All U.S. producers
2024	January	Winter	***	***	***
2024	February	Winter	***	***	***
2024	March	Winter	***	***	***
2024	April	Non-winter	***	***	***
2024	May	Non-winter	***	***	***
2024	June	Non-winter	***	***	***
2024	July	Non-winter	***	***	***
2024	August	Non-winter	***	***	***
2024	September	Non-winter	***	***	***
2024	October	Winter	***	***	***
2024	November	Winter	***	***	***
2024	December	Winter	***	***	***
2025	January	Winter	***	***	***
2025	February	Winter	***	***	***
2025	March	Winter	***	***	***
2025	April	Non-winter	***	***	***
2025	May	Non-winter	***	***	***
2025	June	Non-winter	***	***	***
2025	July	Non-winter	***	***	***
2025	August	Non-winter	***	***	***
2025	September	Non-winter	***	***	***

Table continued.

**Table 3.9 (Continued) All fresh strawberries: U.S. producers' monthly production, by product type and location of producer**

Share across in percent

Year	Month	Product type	U.S. producers: Within region	U.S. producers: Out-of-region	All U.S. producers
2022	January	Winter	***	***	100.0
2022	February	Winter	***	***	100.0
2022	March	Winter	***	***	100.0
2022	April	Non-winter	***	***	100.0
2022	May	Non-winter	***	***	100.0
2022	June	Non-winter	***	***	100.0
2022	July	Non-winter	***	***	100.0
2022	August	Non-winter	***	***	100.0
2022	September	Non-winter	***	***	100.0
2022	October	Winter	***	***	100.0
2022	November	Winter	***	***	100.0
2022	December	Winter	***	***	100.0
2023	January	Winter	***	***	100.0
2023	February	Winter	***	***	100.0
2023	March	Winter	***	***	100.0
2023	April	Non-winter	***	***	100.0
2023	May	Non-winter	***	***	100.0
2023	June	Non-winter	***	***	100.0
2023	July	Non-winter	***	***	100.0
2023	August	Non-winter	***	***	100.0
2023	September	Non-winter	***	***	100.0
2023	October	Winter	***	***	100.0
2023	November	Winter	***	***	100.0
2023	December	Winter	***	***	100.0

Table continued

**Table 3.9 (Continued) All fresh strawberries: U.S. producers' monthly production, by product type and location of producer**

Share across in percent

Year	Month	Product type	U.S. producers: Within region	U.S. producers: Out-of-region	All U.S. producers
2024	January	Winter	***	***	100.0
2024	February	Winter	***	***	100.0
2024	March	Winter	***	***	100.0
2024	April	Non-winter	***	***	100.0
2024	May	Non-winter	***	***	100.0
2024	June	Non-winter	***	***	100.0
2024	July	Non-winter	***	***	100.0
2024	August	Non-winter	***	***	100.0
2024	September	Non-winter	***	***	100.0
2024	October	Winter	***	***	100.0
2024	November	Winter	***	***	100.0
2024	December	Winter	***	***	100.0
2025	January	Winter	***	***	100.0
2025	February	Winter	***	***	100.0
2025	March	Winter	***	***	100.0
2025	April	Non-winter	***	***	100.0
2025	May	Non-winter	***	***	100.0
2025	June	Non-winter	***	***	100.0
2025	July	Non-winter	***	***	100.0
2025	August	Non-winter	***	***	100.0
2025	September	Non-winter	***	***	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “—”. Data include out-of-scope strawberries (reported whether or not winter).

**Figure 3.2 All fresh strawberries: U.S. producers' monthly production, by product type and location of producer**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires.

**USDA NASS data: Acres planted, acres harvested, production, yield per acre, and shares of production, by state and period**

Table 3.10 presents data from the U.S. Department of Agriculture National Agricultural Statistics Service (“USDA NASS”) for U.S. strawberry acres planted, acres harvested, production, yield per acre, and shares of production, by state and period. State data is broken out by California and Florida as those two states account for the vast majority of commercial strawberry production in the United States.<sup>4</sup>

As shown, California accounted for the majority of strawberry acres planted, acres harvested, and production in all periods and accounted for approximately 90 percent of strawberry production in all years. Acres planted, acres harvested, and production were all higher in 2024 than 2022 in both California and Florida. Yield per acre increased across the period in California but decreased for Florida, resulting in a national increase for the measure over the period.

**Table 3.10 All strawberries: USDA NASS U.S. producers’ acres planted, by state and period**

Acres planted in acres

State	2022	2023	2024
California	43,600	43,100	45,300
Florida	12,800	14,200	16,200
All other states (see note)	—	—	—
United States	56,400	57,300	61,500

Table continued.

**Table 3.10 (Continued) All strawberries: USDA NASS U.S. producers’ acres harvested, by state and period**

Acres harvested in acres

State	2022	2023	2024
California	43,500	42,700	45,000
Florida	12,800	14,100	16,200
All other states (see note)	—	—	—
United States	56,300	56,800	61,200

Table continued.

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<sup>4</sup> Petitioner representatives estimated that California and Florida account for more than 99 percent of total U.S. strawberry production. Conference transcript, pp. 129-130 (Pickard and Parker).

**Table 3.10 (Continued) All strawberries: USDA NASS U.S. producers' production, by state and period**

Production in 1,000 pounds

State	2022	2023	2024
California	2,570,000	2,580,000	2,900,000
Florida	282,000	296,000	332,000
All other states (see note)	—	—	—
United States	2,852,000	2,876,000	3,232,000

Table continued.

**Table 3.10 (Continued) All strawberries: USDA NASS U.S. producers' yield per acre, by state and period**

Yield (1,000 pounds per acre)

State	2022	2023	2024
California	59.1	60.4	64.4
Florida	22.0	21.0	20.5
All other states (see note)	—	—	—
United States	50.7	50.6	52.8

Table continued.

**Table 3.10 (Continued) All strawberries: USDA NASS U.S. producers' share of production, by state and period**

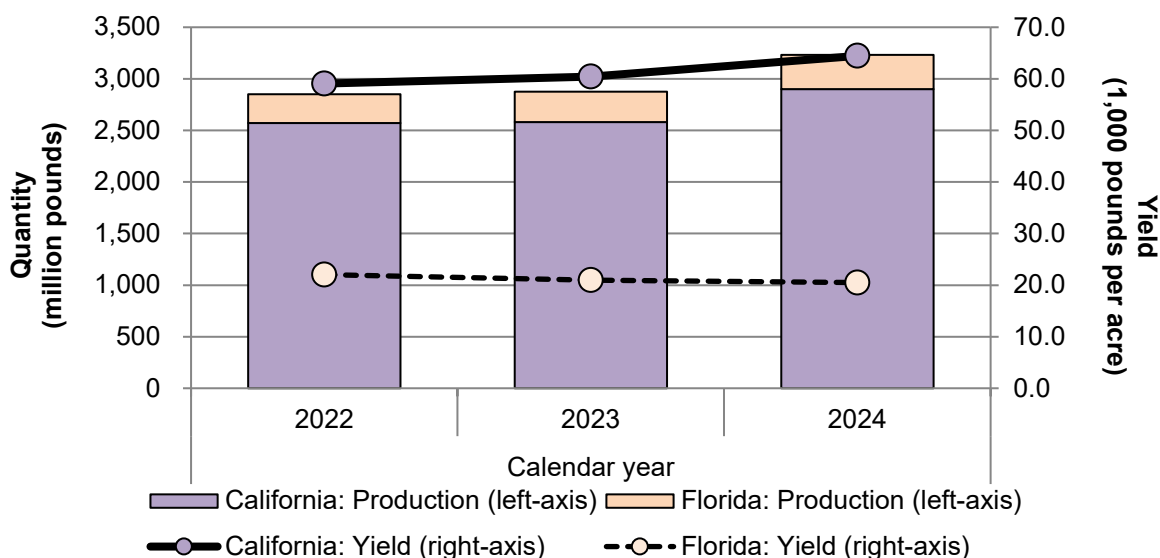
Share of acres harvested in percent; Interim period is January through September

State	2022	2023	2024
California	90.1	89.7	89.7
Florida	9.9	10.3	10.3
All other states (see note)	—	—	—
United States	100.0	100.0	100.0

Source: Compiled from official agricultural statistics of the U.S. Department of Agriculture, National Agricultural Statistical Service (NASS), accessed January 13, 2026.

Note: The data above are for all strawberries regardless of harvest month and whether for processing or the fresh market. Strawberry production state and region level USDA data are only tracked for California and Florida where the vast majority of United States strawberry production occurs. While production of strawberries does occur in other states, commercial production is heavily concentrated in the two states presented. Zeroes, null values, and undefined calculations are suppressed and shown as “—”.

**Figure 3.3 All strawberries: USDA NASS U.S. producers' U.S. production and yield, by state and period**



Source: Compiled from official agricultural statistics of the U.S. Department of Agriculture, National Agricultural Statistical Service (NASS), accessed January 13, 2026.

Note: The data above are for all strawberries regardless of harvest month and whether for processing or the fresh market. Strawberry production state and region level USDA data are only tracked for California and Florida where the vast majority of United States strawberry production occurs.

Table 3.11 presents USDA NASS data in comparison to questionnaire data with questionnaire coverage estimates for strawberry production for the fresh market as well as strawberry production for all markets (including freezing and/or processing) in 2022, 2023, and 2024 (these estimates are for all strawberry production and do not account for winter vs. non-winter).

**Table 3.11 All strawberries: U.S. production, by data source, by market and period**

Quantity in 1,000 pounds; Ratio in percent

Item	Market	Measure	2022	2023	2024
Production: NASS	Fresh	Quantity	2,307,760	2,333,020	2,618,020
Production: Questionnaires	Fresh	Quantity	1,021,876	1,016,595	1,244,833
Coverage	Fresh	Ratio	44.3	43.6	47.5
Production: NASS	All	Quantity	2,852,000	2,876,000	3,232,000
Production: Questionnaires	All	Quantity	1,028,444	1,018,891	1,248,624
Coverage	All	Ratio	36.1	35.4	38.6

Source: Compiled from data submitted in response to Commission questionnaires and official agricultural statistics of the U.S. Department of Agriculture, National Agricultural Statistical Service (NASS), accessed January 13, 2026.

Note: The data presented above are inclusive of both winter and non-winter strawberries.

## Within region U.S. producers' production and production shares by firm

Table 3.12 presents within region U.S. producers' U.S. shipments, export shipments, and total shipments of fresh winter strawberries.<sup>5</sup> Fresh within region winter strawberry production as reported in questionnaire data increased from 2022 to 2024 and was higher across the interim comparison periods.<sup>6</sup>

**Table 3.12 Fresh winter strawberries: Within region U.S. producers' output: Production, by firm and period**

Production in 1,000 pounds; Interim period is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Sweet Life	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
Wish Farms	***	***	***	***	***
Ultra Farms	***	***	***	***	***
Mathis	***	***	***	***	***
All other within region U.S. producers	***	***	***	***	***
All within region U.S. producers	***	***	***	***	***

Table continued.

<sup>5</sup> The Commission also collected practical capacity figures in U.S. producer questionnaires; however, firms had difficulty in reporting these estimates consistently. As such, practical capacity and capacity utilization data from questionnaire responses are not presented (USDA NASS data on acres planted, acres harvested, production, yield per acre were presented in the previous section and are likely more reliable proxies for capacity and utilization).

<sup>6</sup> As the dataset relates to fresh winter strawberries, the interim periods are January through March while full year periods are January through March plus October through December.

**Table 3.12 (Continued) Fresh winter strawberries: Within region U.S. producers' output: Share of production, by firm and period**

Share of production in percent; Interim period is January through September

<b>Firm</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>Interim 2024</b>	<b>Interim 2025</b>
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Sweet Life	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
Wish Farms	***	***	***	***	***
Ultra Farms	***	***	***	***	***
Mathis	***	***	***	***	***
All other within region U.S. producers	***	***	***	***	***
All within region U.S. producers	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

## National U.S. producers' production and production shares by firm

Table 3.13 presents national U.S. producers' U.S. shipments, export shipments, and total shipments of fresh winter strawberries. National fresh winter strawberry production increased from 2022 to 2024 and was higher across the interim periods.

**Table 3.13 Fresh winter strawberries: National U.S. producers' output: Production, by firm and period**

Production in 1,000 pounds; Interim period is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's CA	***	***	***	***	***
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Reiter Bros.	***	***	***	***	***
Sweet Life	***	***	***	***	***
Sierra	***	***	***	***	***
Laguna	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
All other U.S. producers	***	***	***	***	***
All U.S. producers	***	***	***	***	***

Table continued.

**Table 3.13 (Continued) Fresh winter strawberries: National U.S. producers' output: Share of production, by firm and period**

Share of production in percent; Interim period is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's CA	***	***	***	***	***
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Reiter Bros.	***	***	***	***	***
Sweet Life	***	***	***	***	***
Sierra	***	***	***	***	***
Laguna	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
All other U.S. producers	***	***	***	***	***
All U.S. producers	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Figure 3.4 presents U.S. producers' production of fresh winter strawberries, by region and period as reported in questionnaire data. Within region fresh winter strawberry production increased irregularly from 2022 to 2024 and was higher across the interim periods, while out-of-region fresh winter strawberry production increased from 2022 to 2024 but was lower across the interim periods. Resultingly, national production increased from 2022 to 2024 and was higher across the interim periods.

**Figure 3.4 Fresh winter strawberries: U.S. producers' production, by region located and period**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires.

Note: The interim periods are January through March while full year periods are January through March plus October through December.

## **U.S. producers' U.S. shipments and exports**

### **Within region U.S. producers' U.S. shipments by region, total U.S. shipments, export shipments, and total shipments of fresh winter strawberries**

Table 3.14 presents within region U.S. producers' total shipments of fresh winter strawberries, by destination and period, including U.S. shipment and export shipment breakouts. Within region U.S. producers' total shipments were higher in 2024 than 2022 and were higher across the interim periods, by both quantity and value. Export shipments increased irregularly by quantity but decreased irregularly by value from 2022 to 2024 with export shipments being higher across the interim periods by both quantity and value.

Within region U.S. producers' U.S. shipments were higher in 2024 than 2022 by both quantity and value and were higher across the interim periods by both quantity and value. The vast majority of within region U.S. producers' U.S. shipments were within region (\*\*\*) percent or greater by quantity). Within region U.S. producers' within region, out-of-region, and total U.S. shipments all increased from 2022 to 2024 and were higher across the interim periods by both quantity and value.

**Table 3.14 Fresh winter strawberries: Within region U.S. producers' total shipments, by destination and period**

Quantity in 1,000 pounds; Value in 1,000 dollars; Unit values in dollars per pound; Shares in percent; Interim period is January through September

Destination	Measure	2022	2023	2024	Interim 2024	Interim 2025
U.S. shipments: Within region	Quantity	***	***	***	***	***
U.S. shipments: Out-of-region	Quantity	***	***	***	***	***
U.S. shipments: Total	Quantity	***	***	***	***	***
Export shipments	Quantity	***	***	***	***	***
Total shipments	Quantity	***	***	***	***	***
U.S. shipments: Within region	Value	***	***	***	***	***
U.S. shipments: Out-of-region	Value	***	***	***	***	***
U.S. shipments: Total	Value	***	***	***	***	***
Export shipments	Value	***	***	***	***	***
Total shipments	Value	***	***	***	***	***
U.S. shipments: Within region	Unit value	***	***	***	***	***
U.S. shipments: Out-of-region	Unit value	***	***	***	***	***
U.S. shipments: Total	Unit value	***	***	***	***	***
Export shipments	Unit value	***	***	***	***	***
Total shipments	Unit value	***	***	***	***	***
U.S. shipments: Within region	Share 1	***	***	***	***	***
U.S. shipments: Out-of-region	Share 1	***	***	***	***	***
U.S. shipments: Total	Share 1	100.0	100.0	100.0	100.0	100.0
U.S. shipments: Within region	Share 2	***	***	***	***	***
U.S. shipments: Out-of-region	Share 2	***	***	***	***	***
U.S. shipments: Total	Share 2	***	***	***	***	***
Export shipments	Share 2	***	***	***	***	***
Total shipments	Share 2	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Share 1 is the share of U.S. shipments quantity. Share 2 is the share of total shipments quantity. Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

## **National U.S. producers' U.S. shipments by region, total U.S. shipments, export shipments, and total shipments of fresh winter strawberries**

Table 3.15 presents national U.S. producers' total shipments of fresh winter strawberries, by destination and period, including U.S. shipment and export shipment breakouts. National U.S. producers' total shipments increased from 2022 to 2024 and were higher across the interim periods, by both quantity and value. National producers' export shipments increased from 2022 to 2024 by both quantity and value but were lower across the interim periods by both quantity and value.

National U.S. producers' U.S. shipments increased from 2022 to 2024 by both quantity and value and were higher across the interim periods by both quantity and value. The majority of national U.S. producers' U.S. shipments were within region; however, this proportion was lower than reported by the within region producers (\*\*\*) percent or greater of U.S. shipments were within region by quantity, compared to \*\*\* percent or greater for the within region producers). National U.S. producers' within region, out-of-region, and total U.S. shipments of fresh winter strawberries were all higher in 2024 than 2022 and were higher all higher across the interim periods, by both quantity and value.

**Table 3.15 Fresh winter strawberries: National U.S. producers' total shipments, by destination and period**

Quantity in 1,000 pounds; Value in 1,000 dollars; Unit values in dollars per pound; Shares in percent; Interim period is January through September

Destination	Measure	2022	2023	2024	Interim 2024	Interim 2025
U.S. shipments: Within region	Quantity	***	***	***	***	***
U.S. shipments: Out-of-region	Quantity	***	***	***	***	***
U.S. shipments: Total	Quantity	***	***	***	***	***
Export shipments	Quantity	***	***	***	***	***
Total shipments	Quantity	***	***	***	***	***
U.S. shipments: Within region	Value	***	***	***	***	***
U.S. shipments: Out-of-region	Value	***	***	***	***	***
U.S. shipments: Total	Value	***	***	***	***	***
Export shipments	Value	***	***	***	***	***
Total shipments	Value	***	***	***	***	***
U.S. shipments: Within region	Unit value	***	***	***	***	***
U.S. shipments: Out-of-region	Unit value	***	***	***	***	***
U.S. shipments: Total	Unit value	***	***	***	***	***
Export shipments	Unit value	***	***	***	***	***
Total shipments	Unit value	***	***	***	***	***
U.S. shipments: Within region	Share 1	***	***	***	***	***
U.S. shipments: Out-of-region	Share 1	***	***	***	***	***
U.S. shipments: Total	Share 1	100.0	100.0	100.0	100.0	100.0
U.S. shipments: Within region	Share 2	***	***	***	***	***
U.S. shipments: Out-of-region	Share 2	***	***	***	***	***
U.S. shipments: Total	Share 2	***	***	***	***	***
Export shipments	Share 2	***	***	***	***	***
Total shipments	Share 2	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Share 1 is the share of U.S. shipments quantity. Share 2 is the share of total shipments quantity. Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

## Within region U.S. producers' U.S. shipments, by conventional vs. organic and by region

Table 3.16 presents U.S. producers' U.S. shipments of fresh winter strawberries by conventional vs. organic and by region and period for U.S. producers located within region. The vast majority of within region U.S. producers' U.S. shipments were of conventional fresh winter strawberries (i.e., non-organic) by both quantity and value regardless of destination. U.S. shipments of organic fresh winter strawberries had higher average unit values than conventional fresh winter strawberries regardless of destination.

**Table 3.16 Fresh winter strawberries: Within region U.S. producers' U.S. shipments, by product type, region shipped, and period**

Quantity in 1,000 pounds; Value in 1,000 dollars; Unit values in dollars per pound; Interim period is January through September

Product type	Region shipped	Measure	2022	2023	2024	Interim 2024	Interim 2025
Organic	Within region	Quantity	***	***	***	***	***
Conventional	Within region	Quantity	***	***	***	***	***
All product types	Within region	Quantity	***	***	***	***	***
Organic	Out-of-region	Quantity	***	***	***	***	***
Conventional	Out-of-region	Quantity	***	***	***	***	***
All product types	Out-of-region	Quantity	***	***	***	***	***
Organic	All regions	Quantity	***	***	***	***	***
Conventional	All regions	Quantity	***	***	***	***	***
All product types	All regions	Quantity	***	***	***	***	***
Organic	Within region	Value	***	***	***	***	***
Conventional	Within region	Value	***	***	***	***	***
All product types	Within region	Value	***	***	***	***	***
Organic	Out-of-region	Value	***	***	***	***	***
Conventional	Out-of-region	Value	***	***	***	***	***
All product types	Out-of-region	Value	***	***	***	***	***
Organic	All regions	Value	***	***	***	***	***
Conventional	All regions	Value	***	***	***	***	***
All product types	All regions	Value	***	***	***	***	***
Organic	Within region	Unit value	***	***	***	***	***
Conventional	Within region	Unit value	***	***	***	***	***
All product types	Within region	Unit value	***	***	***	***	***
Organic	Out-of-region	Unit value	***	***	***	***	***
Conventional	Out-of-region	Unit value	***	***	***	***	***
All product types	Out-of-region	Unit value	***	***	***	***	***
Organic	All regions	Unit value	***	***	***	***	***
Conventional	All regions	Unit value	***	***	***	***	***
All product types	All regions	Unit value	***	***	***	***	***

Table continued.

**Table 3.16 (Continued) Fresh winter strawberries: Within region U.S. producers' U.S. shipments, by product type, region shipped, and period**

Share in percent; Interim period is January through September

Product type	Region shipped	Measure	2022	2023	2024	Interim 2024	Interim 2025
Organic	Within region	Share of quantity	***	***	***	***	***
Conventional	Within region	Share of quantity	***	***	***	***	***
All product types	Within region	Share of quantity	***	***	***	***	***
Organic	Out-of-region	Share of quantity	***	***	***	***	***
Conventional	Out-of-region	Share of quantity	***	***	***	***	***
All product types	Out-of-region	Share of quantity	***	***	***	***	***
Organic	All regions	Share of quantity	***	***	***	***	***
Conventional	All regions	Share of quantity	***	***	***	***	***
All product types	All regions	Share of quantity	100.0	100.0	100.0	100.0	100.0
Organic	Within region	Share of value	***	***	***	***	***
Conventional	Within region	Share of value	***	***	***	***	***
All product types	Within region	Share of value	***	***	***	***	***
Organic	Out-of-region	Share of value	***	***	***	***	***
Conventional	Out-of-region	Share of value	***	***	***	***	***
All product types	Out-of-region	Share of value	***	***	***	***	***
Organic	All regions	Share of value	***	***	***	***	***
Conventional	All regions	Share of value	***	***	***	***	***
All product types	All regions	Share of value	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “—”.

## National U.S. producers U.S. shipments, by conventional vs. organic and by region

Table 3.17 presents national U.S. producers' U.S. shipments of fresh winter strawberries by conventional vs. organic, by region and period. Similar to the within region producers, the vast majority of national U.S. producers' U.S. shipments were of conventional fresh winter strawberries (i.e., non-organic) by both quantity and value regardless of destination. U.S. shipments of organic fresh winter strawberries had higher average unit values than conventional fresh winter strawberries regardless of destination.

**Table 3.17 Fresh winter strawberries: National U.S. producers' U.S. shipments, by product type, region shipped, and period**

Quantity in 1,000 pounds; Value in 1,000 dollars; Unit values in dollars per pound; Interim period is January through September

Product type	Region shipped	Measure	2022	2023	2024	Interim 2024	Interim 2025
Organic	Within region	Quantity	***	***	***	***	***
Conventional	Within region	Quantity	***	***	***	***	***
All product types	Within region	Quantity	***	***	***	***	***
Organic	Out-of-region	Quantity	***	***	***	***	***
Conventional	Out-of-region	Quantity	***	***	***	***	***
All product types	Out-of-region	Quantity	***	***	***	***	***
Organic	All regions	Quantity	***	***	***	***	***
Conventional	All regions	Quantity	***	***	***	***	***
All product types	All regions	Quantity	***	***	***	***	***
Organic	Within region	Value	***	***	***	***	***
Conventional	Within region	Value	***	***	***	***	***
All product types	Within region	Value	***	***	***	***	***
Organic	Out-of-region	Value	***	***	***	***	***
Conventional	Out-of-region	Value	***	***	***	***	***
All product types	Out-of-region	Value	***	***	***	***	***
Organic	All regions	Value	***	***	***	***	***
Conventional	All regions	Value	***	***	***	***	***
All product types	All regions	Value	***	***	***	***	***
Organic	Within region	Unit value	***	***	***	***	***
Conventional	Within region	Unit value	***	***	***	***	***
All product types	Within region	Unit value	***	***	***	***	***
Organic	Out-of-region	Unit value	***	***	***	***	***
Conventional	Out-of-region	Unit value	***	***	***	***	***
All product types	Out-of-region	Unit value	***	***	***	***	***
Organic	All regions	Unit value	***	***	***	***	***
Conventional	All regions	Unit value	***	***	***	***	***
All product types	All regions	Unit value	***	***	***	***	***

Table continued.

**Table 3.17 (Continued) Fresh winter strawberries: National U.S. producers' U.S. shipments, by product type, region shipped, and period**

Share in percent; Interim period is January through September

Product type	Region shipped	Measure	2022	2023	2024	Interim 2024	Interim 2025
Organic	Within region	Share of quantity	***	***	***	***	***
Conventional	Within region	Share of quantity	***	***	***	***	***
All product types	Within region	Share of quantity	***	***	***	***	***
Organic	Out-of-region	Share of quantity	***	***	***	***	***
Conventional	Out-of-region	Share of quantity	***	***	***	***	***
All product types	Out-of-region	Share of quantity	***	***	***	***	***
Organic	All regions	Share of quantity	***	***	***	***	***
Conventional	All regions	Share of quantity	***	***	***	***	***
All product types	All regions	Share of quantity	100.0	100.0	100.0	100.0	100.0
Organic	Within region	Share of value	***	***	***	***	***
Conventional	Within region	Share of value	***	***	***	***	***
All product types	Within region	Share of value	***	***	***	***	***
Organic	Out-of-region	Share of value	***	***	***	***	***
Conventional	Out-of-region	Share of value	***	***	***	***	***
All product types	Out-of-region	Share of value	***	***	***	***	***
Organic	All regions	Share of value	***	***	***	***	***
Conventional	All regions	Share of value	***	***	***	***	***
All product types	All regions	Share of value	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “—”.

## U.S. producers' inventories

As fresh winter strawberries are a perishable product with a limited shelf life, no U.S. producers reported holding any inventories across the reporting periods.

## U.S. producers' imports from subject sources

Two firms that completed U.S. producers' questionnaires reported imports during the investigation period: Driscoll's and \*\*\*. Tables 3.18 and 3.19 present Driscoll's reported within region and national production, the company's reported imports, and the ratios of the company's imports to its within region and national production, by period.<sup>7</sup> Table 3.20 presents information with respect to \*\*\* reported within region production, its imports, and the ratios of its imports to its U.S. production, by period. All imports reported by both companies were from Mexico.

**Table 3.18 Fresh winter strawberries: Driscoll's within region U.S. production, all U.S. imports from subject sources, and ratio of all subject imports to production, by period**

Quantity in 1,000 pounds; Ratios in percent; Interim period is January through September

Item	Measure	2022	2023	2024	Interim 2024	Interim 2025
U.S. production	Quantity	***	***	***	***	***
Imports from Mexico	Quantity	***	***	***	***	***
Imports from Mexico to U.S. production	Ratio	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

**Table 3.19 Fresh winter strawberries: Driscoll's national U.S. production, all U.S. imports from subject sources, and ratio of all subject imports to production, by period**

Quantity in 1,000 pounds; Ratios in percent; Interim period is January through September

Item	Measure	2022	2023	2024	Interim 2024	Interim 2025
U.S. production	Quantity	***	***	***	***	***
Imports from Mexico	Quantity	***	***	***	***	***
Imports from Mexico to U.S. production	Ratio	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

**Table 3.20 Fresh winter strawberries: \*\*\*'s within region U.S. production, all U.S. imports from subject sources, and ratio of all subject imports to production, by period**

Quantity in 1,000 pounds; Ratios in percent; Interim period is January through September

Item	Measure	2022	2023	2024	Interim 2024	Interim 2025
U.S. production	Quantity	***	***	***	***	***
Imports from Mexico	Quantity	***	***	***	***	***
Imports from Mexico to U.S. production	Ratio	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

<sup>7</sup> Additionally, tables C.5 through C.8 in app. C present related parties exclusion tables excluding U.S. producer Driscoll's from the winter, regional; winter, national; all fresh strawberries, regional; and all fresh strawberries, national datasets.

Table 3.21 presents U.S. producers' narrative responses for reasons for importing.

**Table 3.21 Fresh winter strawberries: U.S. producers' reasons for imports, by firm**

Item	Narrative response on reasons for importing
Driscoll's reason for importing	***
***'s reason for importing	***

Source: Compiled from data submitted in response to Commission questionnaires.

### **U.S. producers' purchases of imports from subject sources**

No responding U.S. producer reported purchases of imports of fresh winter strawberries during the investigation period.

## U.S. employment, wages, and productivity

### U.S. employment, wages, and productivity: Within region U.S. producers

Table 3.22 shows U.S. producers' employment-related data for within region U.S. producers of fresh winter strawberries. Average production and related workers ("PRWs") employed within region increased from 2022 to 2024 but were lower across the interim periods. Total hours worked increased irregularly from 2022 to 2024 and were higher across the interim periods. Resultingly, hours worked per PRW decreased irregularly from 2022 to 2024 but were higher across the interim periods. Total wages paid and hourly wages were both higher in 2024 than in 2022 and were both higher across the interim periods. Productivity per worker as measured in pounds per hour decreased irregularly from 2022 to 2024 but was higher across the interim periods. Unit labor costs increased irregularly from 2022 to 2024 and were unchanged across the interim periods.

**Table 3.22 Fresh winter strawberries: Within region U.S. producers' employment related information, by item and period**

Interim period is January through March; Full year periods are January through March plus October through December

Item	2022	2023	2024	Interim 2024	Interim 2025
Production and related workers (PRWs) (number)	***	***	***	***	***
Total hours worked (1,000 hours)	***	***	***	***	***
Hours worked per PRW (hours)	***	***	***	***	***
Wages paid (\$1,000)	***	***	***	***	***
Hourly wages (dollars per hour)	***	***	***	***	***
Productivity (pounds per hour)	***	***	***	***	***
Unit labor costs (dollars per pound)	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: \*\*\*.

## U.S. employment, wages, and productivity: National U.S. producers

Table 3.23 shows U.S. producers' employment-related data for all U.S. producers (nationally) of fresh winter strawberries. Average PRWs employed nationally increased from 2022 to 2024 but were lower across the interim periods. Total hours worked decreased irregularly from 2022 to 2024 but were higher across the interim periods. Resultingly, hours worked per PRW decreased irregularly from 2022 to 2024 but were higher across the interim periods. Total wages paid increased irregularly while hourly wages increased from 2022 to 2024. Both measures were higher across the interim periods. Productivity per worker as measured in pounds per hour decreased irregularly from 2022 to 2024 but was higher across the interim periods. Unit labor costs increased irregularly from 2022 to 2024 and were higher across the interim periods.

**Table 3.23 Fresh winter strawberries: National U.S. producers' employment related information, by item and period**

Interim period is January through March; Full year periods are January through March plus October through December

Item	2022	2023	2024	Interim 2024	Interim 2025
Production and related workers (PRWs) (number)	***	***	***	***	***
Total hours worked (1,000 hours)	***	***	***	***	***
Hours worked per PRW (hours)	***	***	***	***	***
Wages paid (\$1,000)	***	***	***	***	***
Hourly wages (dollars per hour)	***	***	***	***	***
Productivity (pounds per hour)	***	***	***	***	***
Unit labor costs (dollars per pound)	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: \*\*\*.



## Part 4: U.S. imports, apparent U.S. consumption, and market shares

### U.S. importers

The Commission issued importer questionnaires to 44 firms believed to be importers of subject fresh winter strawberries and non-winter fresh (all other) strawberries, as well as to all U.S. producers of fresh strawberries.<sup>1</sup> Usable questionnaire responses were received from 15 companies that imported fresh winter strawberries, representing \*\*\* percent of U.S. imports of fresh winter strawberries from Mexico in 2024 and \*\*\* percent of U.S. imports of fresh winter strawberries from nonsubject sources in 2024 under HTS subheading 0810.10.40.<sup>2</sup> <sup>3</sup> Table 4.1 lists all responding U.S. importers of fresh winter strawberries from Mexico and other sources, their locations, and their shares of U.S. imports, in 2024.

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<sup>1</sup> The Commission issued questionnaires to those firms identified in the petition; staff research; and proprietary, Census-edited Customs' import records.

<sup>2</sup> Fifteen companies reported they imported all fresh strawberries, representing \*\*\* percent of U.S. imports of all fresh strawberries from Mexico in 2024 and \*\*\* percent of U.S. imports of all fresh strawberries from nonsubject sources in 2024 under HTS subheadings 0810.10.20 and 0810.10.40. Eight firms reported only importing fresh non-winter (all other) strawberries, six and two of which reported importing fresh non-winter (all other) strawberries from Mexico and nonsubject sources, respectively.

<sup>3</sup> Four firms submitted questionnaire responses indicating they did not import any fresh strawberries from any source since January 1, 2022.

**Table 4.1 Fresh winter strawberries: U.S. importers, their headquarters, and share of total imports within a given source by firm, 2024**

Share in percent

<b>Firm</b>	<b>Headquarters</b>	<b>Within region: Mexico</b>	<b>Within region: Nonsubject</b>	<b>Within region: All imports</b>	<b>National: Mexico</b>	<b>National: Nonsubject</b>	<b>National: All imports</b>
Agrana	Jacona, Michoacán, Mexico	***	***	***	***	***	***
California Giant	Watsonville, CA	***	***	***	***	***	***
Central West	Santa Maria, CA	***	***	***	***	***	***
Driscoll's	Watsonville, CA	***	***	***	***	***	***
Expo Fresh	San Diego, CA	***	***	***	***	***	***
Gem-Pack	Irvine, CA	***	***	***	***	***	***
Good Farms	San Diego, CA	***	***	***	***	***	***
Lange Fresh	St. Louis, MO	***	***	***	***	***	***
Mastronardi	Kingsville, ON	***	***	***	***	***	***
Meridian	San Antonio, TX	***	***	***	***	***	***
Mucci	Kingsville, Ontario, Canada	***	***	***	***	***	***
Nature's Choice	San Diego, CA	***	***	***	***	***	***
Sun Belle	Schiller Park, IL	***	***	***	***	***	***
Walmart	Bentonville, AR	***	***	***	***	***	***
Wish Farms	Plant City, FL	***	***	***	***	***	***
All firms	Various	100.0	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

## U.S. imports

Table 4.2 presents data for within region<sup>4</sup> imports of fresh winter strawberries from Mexico and all other sources.<sup>5</sup> Throughout the period for which data were collected, by quantity, imports from Mexico accounted for the vast majority (over 98 percent) of all within region U.S. imports of fresh winter strawberries.

Both the quantity and value of within region U.S. imports of fresh winter strawberries from Mexico decreased from 2022 to 2023 and increased from 2023 to 2024, increasing overall during 2022 to 2024.<sup>6 7</sup> Imports from Mexico, by quantity and value, were both lower in interim 2025 than in interim 2024. Within region nonsubject U.S. imports of fresh winter strawberries, by both quantity and value, increased annually from 2022 to 2024 but were both noticeably lower in interim 2025 than in interim 2024.

The unit value of within region U.S. imports of fresh winter strawberries from Mexico increased from 2022 to 2023 and decreased from 2023 to 2024, ending 2024 higher than in 2022, but was lower in interim 2025 than in interim 2024. The unit value of nonsubject imports increased annually, with the largest increase occurring from 2022 to 2023 and was higher in interim 2025 compared to interim 2024. The unit value of within region U.S. imports of fresh winter strawberries from nonsubject sources was higher than the average unit value of imports from Mexico in each year and interim periods.

Within region U.S. imports of fresh winter strawberries from Mexico as a ratio to within region U.S. producers' production decreased from 2022 to 2023 and increased from 2023 to 2024, reaching a peak of \*\*\* percent in 2024, but was lower in interim 2025 compared to interim 2024. Within region U.S. imports of fresh winter strawberries from nonsubject sources

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<sup>4</sup> The region of U.S. imports is defined in the questionnaire as the U.S. state of destination for U.S. imports, not the U.S. border of entry.

<sup>5</sup> The petition defined the scope as covering all fresh and chilled winter strawberries from Mexico harvested or entered during the period October 1 through March 31, whereas the scope defined by Commerce defines the winter period as November 1 through March 31. The import data uses the petition winter period scope definition of October 1 through March 31.

<sup>6</sup> Driscoll's, which accounted for \*\*\*. Driscoll's importer questionnaire response, question II-4; Driscoll's postconference brief, p. 13.

<sup>7</sup> Hurricane Milton occurred in Florida during the 2024 growing season which delayed the planting and harvest for within region producers and arguably contributed to the increase in U.S. imports of fresh winter strawberries from Mexico in 2024. Conference transcript, p. 125 (Parker); Driscoll's postconference brief, pp. 9, 10, 37 Appendix A.

as a ratio to within region U.S. producers' production was stagnant in 2022 and 2023 and increased to \*\*\* percent in 2024 but was lower in interim 2025 compared to interim 2024.

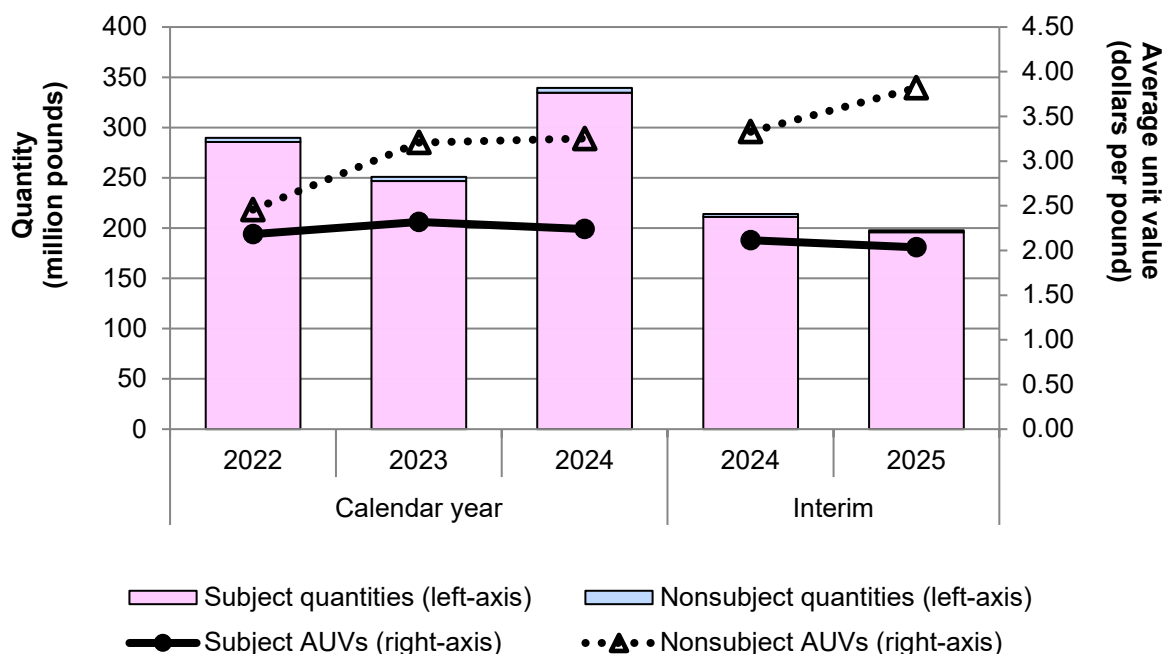
**Table 4.2 Fresh winter strawberries: Within region U.S. imports, by source and period**

Quantity in 1,000 pounds; value in 1,000 dollars; unit values in dollars per pound; share and ratio in percent; ratio represents the ratio to within region U.S. production; interim period is January through September

Source	Measure	2022	2023	2024	Interim 2024	Interim 2025
Mexico	Quantity	285,700	246,705	334,591	211,106	195,809
Nonsubject sources	Quantity	4,197	4,241	4,837	2,849	1,903
All import sources	Quantity	289,897	250,945	339,429	213,956	197,712
Mexico	Value	623,419	572,061	749,448	446,523	398,444
Nonsubject sources	Value	10,312	13,599	15,728	9,485	7,269
All import sources	Value	633,731	585,660	765,177	456,009	405,713
Mexico	Unit value	2.18	2.32	2.24	2.12	2.03
Nonsubject sources	Unit value	2.46	3.21	3.25	3.33	3.82
All import sources	Unit value	2.19	2.33	2.25	2.13	2.05
Mexico	Share of quantity	98.6	98.3	98.6	98.7	99.0
Nonsubject sources	Share of quantity	1.4	1.7	1.4	1.3	1.0
All import sources	Share of quantity	100.0	100.0	100.0	100.0	100.0
Mexico	Share of value	98.4	97.7	97.9	97.9	98.2
Nonsubject sources	Share of value	1.6	2.3	2.1	2.1	1.8
All import sources	Share of value	100.0	100.0	100.0	100.0	100.0
Mexico	Ratio	***	***	***	***	***
Nonsubject sources	Ratio	***	***	***	***	***
All import sources	Ratio	***	***	***	***	***

Source: Official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, limited to October through March and adjusted to report only within region imports by source using the data reported by respondents in the Commission's U.S. importer questionnaire. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values.

**Figure 4.1 Fresh winter strawberries: Within region U.S. import quantities and average unit values, by source and period**



Source: Official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, limited to October through March and adjusted to report only within region imports by source using the data reported by respondents in the Commission's U.S. importer questionnaire. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values.

Table 4.3 presents data for national U.S. imports of fresh winter strawberries from Mexico and nonsubject sources. Like within region imports, national imports of fresh winter strawberries from Mexico, by quantity and value, also accounted for over 98 percent of all nationwide U.S. imports of fresh winter strawberries throughout the period for which data were collected.

National U.S. imports of fresh winter strawberries from Mexico, by quantity, decreased from 2022 to 2023, increased from 2023 to 2024, increasing overall during 2022 to 2024. The value of imports from Mexico increased annually, with the largest increase occurring from 2023 to 2024. National U.S. imports of fresh winter strawberries from Mexico, by both quantity and value, were lower in interim 2025 compared to interim 2024. Following a similar trend to within region nonsubject imports, nonsubject national U.S. imports of fresh winter strawberries, by quantity and value, increased annually during 2022 to 2024 but were both lower in interim 2025 compared to interim 2024.

The unit value of national imports from Mexico increased from 2022 to 2023 and decreased from 2023 to 2024, increasing overall during 2022 to 2024, but was lower in interim 2025 compared to interim 2024. As a result of annual increases in quantity and value, the unit value of nonsubject imports increased in each year and was higher in interim 2025 compared to interim 2024.

National U.S. imports of fresh winter strawberries from Mexico as a ratio to national U.S. production decreased from \*\*\* percent in 2022 to \*\*\* percent in 2024 and was lower in interim 2025 compared to interim 2024. National U.S. imports from nonsubject sources as a ratio to national U.S. production decreased annually and was lower in interim 2025 compared to interim 2024, reaching a low of \*\*\* percent.

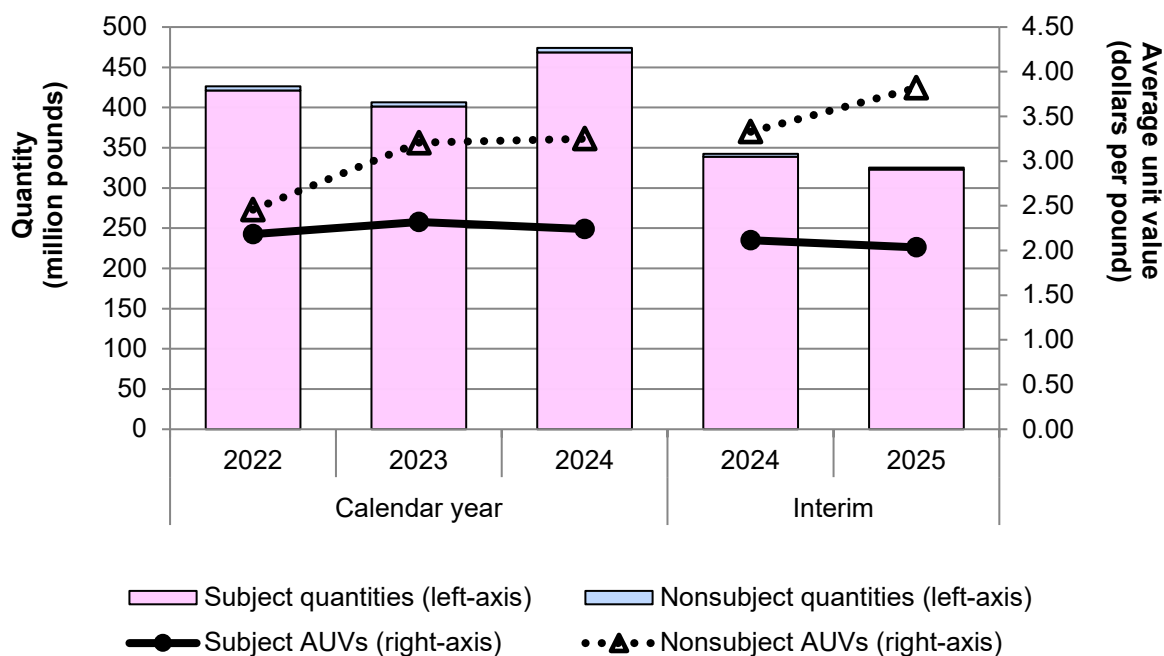
**Table 4.3 Fresh winter strawberries: National U.S. imports, by source and period**

Quantity in 1,000 pounds; value in 1,000 dollars; unit values in dollars per pound; share and ratio in percent; ratio represents the ratio to within region U.S. production; interim period is January through September

Source	Measure	2022	2023	2024	Interim 2024	Interim 2025
Mexico	Quantity	421,065	401,295	468,374	338,781	322,992
Nonsubject sources	Quantity	5,072	5,278	5,545	3,416	2,201
All import sources	Quantity	426,138	406,573	473,920	342,197	325,193
Mexico	Value	918,796	930,527	1,049,108	716,577	657,243
Nonsubject sources	Value	12,463	16,925	18,029	11,370	8,408
All import sources	Value	931,259	947,451	1,067,137	727,947	665,651
Mexico	Unit value	2.18	2.32	2.24	2.12	2.03
Nonsubject sources	Unit value	2.46	3.21	3.25	3.33	3.82
All import sources	Unit value	2.19	2.33	2.25	2.13	2.05
Mexico	Share of quantity	98.8	98.7	98.8	99.0	99.3
Nonsubject sources	Share of quantity	1.2	1.3	1.2	1.0	0.7
All import sources	Share of quantity	100.0	100.0	100.0	100.0	100.0
Mexico	Share of value	98.7	98.2	98.3	98.4	98.7
Nonsubject sources	Share of value	1.3	1.8	1.7	1.6	1.3
All import sources	Share of value	100.0	100.0	100.0	100.0	100.0
Mexico	Ratio	***	***	***	***	***
Nonsubject sources	Ratio	***	***	***	***	***
All import sources	Ratio	***	***	***	***	***

Source: Official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, limited to October through March. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values.

**Figure 4.2 Fresh winter strawberries: National U.S. import quantities and average unit values, by source and period**



Source: Official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, limited to October through March. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values.

Table 4.4 presents data on national U.S. imports of fresh winter strawberries from Mexico and nonsubject sources, by destination region (within region, out-of-region, and total). The majority of imports of fresh winter strawberries from both Mexico and nonsubject sources went to within region destinations throughout the period for which data were collected. The share of total U.S. imports of fresh winter strawberries from Mexico accounted for by within region destinations was 67.9 percent in 2022, increasing irregularly to a peak of 71.4 percent in 2024, but was lower in interim 2025 than in interim 2024, dropping to a low of 60.6 percent. The share of total U.S. imports of fresh winter strawberries from nonsubject sources to within region destinations was 82.7 percent in 2022, increasing irregularly to a peak of 87.2 percent in 2024, and was higher in interim 2025 than in interim 2024.

**Table 4.4 Fresh winter strawberries: U.S. importers' U.S. imports, by source, destination, and period**

Quantity in 1,000 pounds; value in 1,000 dollars; unit values in dollars per pound; share and ratio in percent; ratio represents the ratio to within region U.S. production; interim period is January through September

Source and destination region	Measure	2022	2023	2024	Interim 2024	Interim 2025
Mexico: Within region	Quantity	285,700	246,705	334,591	211,106	195,809
Mexico: Out-of-region	Quantity	135,365	154,590	133,783	127,675	127,183
Mexico: All regions	Quantity	421,065	401,295	468,374	338,781	322,992
Mexico: Within region	Share	67.9	61.5	71.4	62.3	60.6
Mexico: Out-of-region	Share	32.1	38.5	28.6	37.7	39.4
Mexico: All regions	Share	100.0	100.0	100.0	100.0	100.0
Nonsubject sources: Within region	Quantity	4,197	4,241	4,837	2,849	1,903
Nonsubject sources: Out-of-region	Quantity	875	1,037	708	566	298
Nonsubject sources: All regions	Quantity	5,072	5,278	5,545	3,416	2,201
Nonsubject sources: Within region	Share	82.7	80.3	87.2	83.4	86.5
Nonsubject sources: Out-of-region	Share	17.3	19.7	12.8	16.6	13.5
Nonsubject sources: All regions	Share	100.0	100.0	100.0	100.0	100.0
All import sources: Within region	Quantity	289,897	250,945	339,429	213,956	197,712
All import sources: Out-of-region	Quantity	136,241	155,627	134,491	128,242	127,481
All import sources: All regions	Quantity	426,138	406,573	473,920	342,197	325,193
All import sources: Within region	Share	68.0	61.7	71.6	62.5	60.8
All import sources: Out-of-region	Share	32.0	38.3	28.4	37.5	39.2
All import sources: All regions	Share	100.0	100.0	100.0	100.0	100.0

Source: Official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, limited to October through March. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values.

Tables 4.5 and 4.6 present data on U.S. importers' within region U.S. shipments of organic and conventional fresh winter strawberries from Mexico and nonsubject sources. There were \*\*\* within region U.S. shipments of organic fresh winter strawberries from nonsubject sources during the period for which data were collected.

By quantity, conventional strawberries accounted for the large majority (above \*\*\* percent) of within region U.S. shipments of fresh winter strawberries from Mexico throughout the period for which data were collected. The quantity and value of conventional strawberries of within region U.S. shipments of imports from Mexico increased annually from 2022 to 2024 and were both higher in interim 2025 compared to interim 2024. The quantity and value of organic strawberries fluctuated over the period, increasing overall from 2022 to 2024, and were higher in interim 2025 compared to interim 2024.

The unit value of organic fresh winter strawberries was notably higher than the unit values of conventional fresh winter strawberries in each period for which data were collected. The unit value of conventional fresh winter strawberries decreased annually but was slightly higher in interim 2025 compared to interim 2024, while the unit value of organic strawberries decreased overall from 2022 to 2024 but was higher in interim 2025 than in interim 2024.

**Table 4.5 Fresh winter strawberries: U.S. importers' within region U.S. shipments of imports from Mexico, by product type and period**

Quantity in 1,000 pounds; value in 1,000 dollars; unit values in dollars per pound; share in percent; interim period is January through September

Product type	Measure	2022	2023	2024	Interim 2024	Interim 2025
Organic	Quantity	***	***	***	***	***
Conventional	Quantity	***	***	***	***	***
All product type	Quantity	163,291	190,221	195,043	124,985	132,022
Organic	Value	***	***	***	***	***
Conventional	Value	***	***	***	***	***
All product type	Value	***	***	***	***	***
Organic	Unit value	***	***	***	***	***
Conventional	Unit value	***	***	***	***	***
All product type	Unit value	2.77	2.68	2.63	2.37	2.43
Organic	Share of quantity	***	***	***	***	***
Conventional	Share of quantity	***	***	***	***	***
All product type	Share of quantity	100.0	100.0	100.0	100.0	100.0
Organic	Share of value	***	***	***	***	***
Conventional	Share of value	***	***	***	***	***
All product type	Share of value	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

The U.S. importers' within region U.S. shipments of conventional fresh winter strawberries from nonsubject sources, by quantity and value, increased annually from 2022 to 2024, but the quantity was lower in interim 2025 compared to interim 2024, while the value was higher. The unit value of conventional fresh winter strawberries imported from nonsubject sources increased annually from 2022 to 2024 and was higher in interim 2025 than in interim 2024.

**Table 4.6 Fresh winter strawberries: U.S. importers' within region U.S. shipments of imports from nonsubject sources, by product type and period**

Quantity in 1,000 pounds; value in 1,000 dollars; unit values in dollars per pound; share in percent; interim period is January through September

Product type	Measure	2022	2023	2024	Interim 2024	Interim 2025
Organic	Quantity	***	***	***	***	***
Conventional	Quantity	***	***	***	***	***
All product type	Quantity	***	***	***	***	***
Organic	Value	***	***	***	***	***
Conventional	Value	***	***	***	***	***
All product type	Value	***	***	***	***	***
Organic	Unit value	***	***	***	***	***
Conventional	Unit value	***	***	***	***	***
All product type	Unit value	***	***	***	***	***
Organic	Share of quantity	***	***	***	***	***
Conventional	Share of quantity	***	***	***	***	***
All product type	Share of quantity	100.0	100.0	100.0	100.0	100.0
Organic	Share of value	***	***	***	***	***
Conventional	Share of value	***	***	***	***	***
All product type	Share of value	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “—”.

Tables 4.7 and 4.8 present data on U.S. importers' national U.S. shipments of organic and conventional fresh winter strawberries from Mexico and all other sources.

Conventional strawberries accounted for the majority (over 78.9 percent) of national U.S. shipments of fresh winter strawberries from Mexico, by quantity, throughout the period for which data were collected. The quantity and value of U.S. importers' national U.S. shipments of conventional strawberries from Mexico increased annually from 2022 to 2024 and were both higher in interim 2025 compared to interim 2024. The quantity and value of organic strawberries of national U.S. shipments of imports from Mexico both increased irregularly during 2022 to 2024 and were both higher in interim 2025 compared to interim 2024. The unit value of organic fresh winter strawberries was notably higher than conventional fresh winter strawberries in each year and interim period. The unit value of conventional fresh winter strawberries decreased irregularly from 2022 to 2024 but was higher in interim 2025 compared to interim 2024, while the unit value of organic strawberries decreased annually from 2022 to 2024 but was higher in interim 2025 than in interim 2024.

**Table 4.7 Fresh winter strawberries: U.S. importers' national U.S. shipments of imports from Mexico, by product type and period**

Quantity in 1,000 pounds; value in 1,000 dollars; unit values in dollars per pound; share in percent; interim period is January through September

Product type	Measure	2022	2023	2024	Interim 2024	Interim 2025
Organic	Quantity	45,947	63,400	52,105	44,925	47,192
Conventional	Quantity	217,921	244,415	255,972	168,324	177,999
All product type	Quantity	263,869	307,815	308,077	213,249	225,191
Organic	Value	155,218	209,518	171,596	141,478	150,375
Conventional	Value	550,922	620,028	632,206	364,624	393,282
All product type	Value	706,140	829,546	803,802	506,102	543,657
Organic	Unit value	3.38	3.30	3.29	3.15	3.19
Conventional	Unit value	2.53	2.54	2.47	2.17	2.21
All product type	Unit value	2.68	2.69	2.61	2.37	2.41
Organic	Share of quantity	17.4	20.6	16.9	21.1	21.0
Conventional	Share of quantity	82.6	79.4	83.1	78.9	79.0
All product type	Share of quantity	100.0	100.0	100.0	100.0	100.0
Organic	Share of value	22.0	25.3	21.3	28.0	27.7
Conventional	Share of value	78.0	74.7	78.7	72.0	72.3
All product type	Share of value	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

The majority of national U.S. shipments of imports of fresh winter strawberries from nonsubject sources, by quantity, were also conventional strawberries, accounting for over \*\*\* percent during the period for which data were collected. National U.S. shipments of conventional fresh winter strawberries from nonsubject sources increased annually by both quantity and value from 2022 to 2024, while U.S. shipments of organic fresh winter strawberries increased irregularly from 2022 to 2024. National U.S. shipments of imports of both conventional and organic fresh winter strawberries by quantity were lower in interim 2025 compared to interim 2024. National U.S. shipments of imports of conventional fresh winter strawberries were higher by value in interim 2025 than in interim 2024, while national U.S. shipments of organic fresh winter strawberries were lower by value across interim periods. Like national U.S. shipments of imports from Mexico, the unit values of organic strawberries were higher than conventional strawberries in each year and interim period. The unit values of both conventional and organic strawberries increased annually from 2022 to 2024 and were higher in interim 2025 compared to interim 2024.

**Table 4.8 Fresh winter strawberries: U.S. importers' national U.S. shipments of imports from nonsubject sources, by product type and period**

Quantity in 1,000 pounds; value in 1,000 dollars; unit values in dollars per pound; share in percent; interim period is January through September

Product type	Measure	2022	2023	2024	Interim 2024	Interim 2025
Organic	Quantity	***	***	***	***	***
Conventional	Quantity	***	***	***	***	***
All product type	Quantity	***	***	***	***	***
Organic	Value	***	***	***	***	***
Conventional	Value	***	***	***	***	***
All product type	Value	***	***	***	***	***
Organic	Unit value	***	***	***	***	***
Conventional	Unit value	***	***	***	***	***
All product type	Unit value	***	***	***	***	***
Organic	Share of quantity	***	***	***	***	***
Conventional	Share of quantity	***	***	***	***	***
All product type	Share of quantity	100.0	100.0	100.0	100.0	100.0
Organic	Share of value	***	***	***	***	***
Conventional	Share of value	***	***	***	***	***
All product type	Share of value	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

## Negligibility

The statute requires that an investigation be terminated without an injury determination if imports of the subject merchandise are found to be negligible.<sup>8</sup> Negligible imports are generally defined in the Act, as amended, as imports from a country of merchandise corresponding to a domestic like product where such imports account for less than 3 percent of the volume of all such merchandise imported into the United States in the most recent 12-month period for which data are available that precedes the filing of the petition or the initiation of the investigation. However, if there are imports of such merchandise from a number of countries subject to investigations initiated on the same day that individually account for less than 3 percent of the total volume of the subject merchandise, and if the imports from those countries collectively account for more than 7 percent of the volume of all such merchandise imported into the United States during the applicable 12-month period, then imports from such countries are deemed not to be negligible.<sup>9</sup> Imports from Mexico accounted for 99.0 percent of total imports of fresh winter strawberries by quantity from December 2024 through November 2025.<sup>10</sup>

**Table 4.9 Fresh winter strawberries: U.S. imports in the twelve-month period preceding the filing of the petition, December 2024 to November 2025**

Quantity in 1,000 pounds; Share of quantity in percent

Source of imports	Quantity	Share of quantity
Mexico	454,142	99.0
All other sources	4,371	1.0
All import sources	458,513	100.0

Source: Official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026. Imports are based on the imports for consumption data series.

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<sup>8</sup> Sections 703(a)(1), 705(b)(1), 733(a)(1), and 735(b)(1) of the Act (19 U.S.C. §§ 1671b(a)(1), 1671d(b)(1), 1673b(a)(1), and 1673d(b)(1)).

<sup>9</sup> Section 771 (24) of the Act (19 U.S.C § 1677(24)).

<sup>10</sup> Data presented in the negligibility data uses the petition winter period scope definition of October 1 through March 31 and therefore only includes import data from December 2024 to March 2025 and October 2025 to November 2025.

## Apparent U.S. consumption and market shares

### Within region

#### Quantity

Table 4.10 and figure 4.3 present data on within region fresh winter strawberries apparent U.S. consumption and U.S. market shares, by quantity. Within region apparent U.S. consumption, by quantity, decreased from 2022 to 2023, then increased notably from 2023 to 2024, reflecting pronounced increases in U.S. shipments from out-of-region U.S. producers and U.S. shipments of U.S. imports of fresh winter strawberries from Mexico, for an overall increase during 2022 to 2024. As U.S. imports of fresh winter strawberries declined from interim 2024 to interim 2025, within region apparent U.S. consumption, by quantity, was lower in interim 2025 than in interim 2024, despite higher within-region U.S. producers U.S. shipments.

By quantity, all U.S. producers' market share accounted for about \*\*\* of the within region apparent U.S. consumption throughout the period for which data were collected, reaching over \*\*\* percent only in 2023 and interim 2025. Within region U.S. producers' market share accounted for the majority of all U.S. producers' within region U.S. shipments. All U.S. producers' market share of the within region apparent U.S. consumption, by quantity, increased from 2022 to 2023, but was offset from a nearly equivalent decrease from 2023 to 2024, resulting in an overall slight increase from 2022 to 2024, and was higher in interim 2025 compared to interim 2024. Within region U.S. producers' market share increased from \*\*\* percent in 2022 to \*\*\* percent in 2023 and decreased to \*\*\* percent in 2024, decreasing overall by \*\*\* percentage points during 2022 to 2024. Within region U.S. producers' market share was higher in interim 2025, where it peaked at \*\*\* percent, compared to interim 2024. Out-of-region U.S. producers' market share of within region apparent U.S. consumption increased annually from 2022 to 2024, increasing from \*\*\* percent to \*\*\* percent, but was slightly lower in interim 2025 (\*\*\* percent) compared to interim 2024 (\*\*\* percent).

The share of the within region apparent U.S. consumption market held by within region U.S. imports from Mexico largely accounted for the remaining \*\*\* of the market share throughout the period for which data were collected, dipping below \*\*\* percent only in 2023 and interim 2025, reflecting inverse changes in total U.S. producers' market share. The share of within region U.S. imports from Mexico of the within region apparent U.S. consumption decreased from 2022 to 2023 and increased from 2023 to 2024, offsetting the initial decrease, overall decreasing only slightly from 2022 to 2024. The share of the within region market held by within region U.S. imports from nonsubject sources remained relatively consistent at \*\*\* percent throughout the period for which data were collected. The shares of the within region market held by within region U.S. imports from Mexico and nonsubject sources were both lower in interim 2025 than in interim 2024.

By quantity, within region U.S. producers' within region U.S. shipments of fresh winter strawberries, increased annually from 2022 to 2024, while and out-of-region U.S. producers' within region U.S. shipments of fresh winter strawberries decreased slightly from 2022 to 2023 and increased from 2023 to 2024. Out-of-region producers' U.S. shipments increased overall during 2022 to 2024 at a higher rate than those of within region producers. Within region U.S. producers' within region U.S. shipments of fresh winter strawberries were higher in interim 2025 than in interim 2024, while out-of-region U.S. producers' within region U.S. shipments of fresh winter strawberries were lower.

Consistent with within region apparent U.S. consumption, U.S. importers' within region U.S. shipments from Mexico decreased from 2022 to 2023 and increased notably from 2023 to 2024, increasing overall during 2022 to 2024, but were lower in interim 2025 than in interim 2024. U.S. importers' within region U.S. shipments from nonsubject sources increased annually from 2022 to 2024 but were notably lower in interim 2025 than in interim 2024.

**Table 4.10 Fresh winter strawberries: Within region apparent U.S. consumption and market shares based on quantity data, by source and period**

Quantity in 1,000 pounds; shares in percent; interim period is January through September

Source	Measure	2022	2023	2024	Interim 2024	Interim 2025
U.S. producers: Located within region	Quantity	***	***	***	***	***
U.S. producers: Located out-of-region	Quantity	***	***	***	***	***
U.S. producers: Located throughout U.S.	Quantity	***	***	***	***	***
Mexico	Quantity	285,700	246,705	334,591	211,106	195,809
Nonsubject sources	Quantity	4,197	4,241	4,837	2,849	1,903
All import sources	Quantity	289,897	250,945	339,429	213,956	197,712
All sources	Quantity	***	***	***	***	***
U.S. producers: Located within region	Share	***	***	***	***	***
U.S. producers: Located out-of-region	Share	***	***	***	***	***
U.S. producers: Located throughout U.S.	Share	***	***	***	***	***
Mexico	Share	***	***	***	***	***
Nonsubject sources	Share	***	***	***	***	***
All import sources	Share	***	***	***	***	***
All sources	Share	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires for U.S. producers' U.S. shipments data and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, limited to October through March and adjusted to report only within region imports by source using the data reported by respondents in the Commission's U.S. importer questionnaire. Imports are based on the imports for consumption data series.

Note: Within region apparent consumption includes the U.S. shipments of U.S. producers delivered within region regardless of harvest location. U.S. imports data are within region U.S. imports based on state of destination.

**Figure 4.3 Fresh winter strawberries: Within region apparent U.S. consumption based on quantity data, by source and period**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires

## Value

Table 4.11 and figure 4.4 present data on the within region apparent U.S. consumption and U.S. market shares, by value, for fresh winter strawberries. Within region apparent U.S. consumption, by value, increased irregularly from 2022 to 2024, with the increase occurring from 2023 to 2024, but was lower in interim 2025 compared to interim 2024.

The share of the value of within region apparent U.S. consumption held by all U.S. producers increased from 2022 to 2023 and decreased from 2023 to 2024, ending 2024 slightly lower than in 2022, but was higher in interim 2025 than in interim 2024. By value, within region U.S. producers' market share increased from \*\*\* percent in 2022 to \*\*\* percent in 2023 and decreased to \*\*\* percent in 2024, decreasing overall by \*\*\* percentage points during 2022 to 2024, but was higher in interim 2025 compared to interim 2024, reaching a peak of \*\*\* percent. Out-of-region U.S. producers' market share of within region apparent U.S. consumption, increased annually from \*\*\* percent in 2022 to \*\*\* percent in 2024 and was slightly higher in interim 2025 compared to interim 2024.

The share of the within region market held by U.S. imports from Mexico, by value, decreased from 2022 to 2023, which was offset by the increase from 2023 to 2024, ending 2024 slightly higher than in 2022, while the share of value of the within region market held by U.S. imports from nonsubject sources remained relatively constant, increasing only slightly, from 2022 to 2024. The shares of value of the within region market held by U.S. imports from Mexico and nonsubject sources were both lower in interim 2025 than in interim 2024.

The value of all U.S. producers' within region U.S. shipments increased annually from 2022 to 2024 and was higher in interim 2025 than in interim 2024. The value of within region U.S. producers' within region U.S. shipments of fresh winter strawberries increased from 2022 to 2023 and decreased from 2023 to 2024, increasing overall from 2022 to 2024. Out-of-region U.S. producers' within region U.S. shipments of fresh winter strawberries increased annually, most notably from 2023 to 2024. Both within region and of out-of-region U.S. producers' within region U.S. shipments were higher in interim 2025 than in interim 2024.

The value of U.S. importers' U.S. shipments from Mexico decreased from 2022 to 2023 and sharply increased from 2023 to 2024, increasing overall during 2022 to 2024, but were lower in interim 2025 compared to interim 2024. U.S. importers' U.S. shipments from nonsubject sources increased annually but were lower in interim 2025 compared to interim 2024.

**Table 4.11 Fresh winter strawberries: Within region apparent U.S. consumption and market shares based on value data, by source and period**

Value in 1,000 dollars; shares in percent; interim is January through September

Source	Measure	2022	2023	2024	Interim 2024	Interim 2025
U.S. producers: Located within region	Value	***	***	***	***	***
U.S. producers: Located out-of-region	Value	***	***	***	***	***
U.S. producers: Located throughout U.S.	Value	***	***	***	***	***
Mexico	Value	623,419	572,061	749,448	446,523	398,444
Nonsubject sources	Value	10,312	13,599	15,728	9,485	7,269
All import sources	Value	633,731	585,660	765,177	456,009	405,713
All sources	Value	***	***	***	***	***
U.S. producers: Located within region	Share	***	***	***	***	***
U.S. producers: Located out-of-region	Share	***	***	***	***	***
U.S. producers: Located throughout U.S.	Share	***	***	***	***	***
Mexico	Share	***	***	***	***	***
Nonsubject sources	Share	***	***	***	***	***
All import sources	Share	***	***	***	***	***
All sources	Share	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires for U.S. producers' U.S. shipments data and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, limited to October through March and adjusted to report only within region imports by source using the data reported by respondents in the Commission's U.S. importer questionnaire. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values.

Note: Within region apparent consumption includes the U.S. shipments of U.S. producers delivered within region regardless of harvest location. U.S. imports data are within region U.S. imports based on state of destination.

**Figure 4.4 Fresh winter strawberries: Apparent U.S. consumption based on value, by source and period**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires for U.S. producers' U.S. shipments data and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, limited to October through March and adjusted to report only within region imports by source using the data reported by respondents in the Commission's U.S. importer questionnaire. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values.

## National

### Quantity

Table 4.12 and figure 4.5 present data on national apparent U.S. consumption and U.S. market shares, by quantity, for fresh winter strawberries. The quantity of national apparent U.S. consumption increased irregularly from 2022 to 2024, with the increase occurring from 2023 to 2024, reflecting increases in U.S. imports from Mexico and out-of-region U.S. producers' U.S. shipments, but was slightly lower in interim 2025 than in interim 2024.

The share of national apparent U.S. consumption held by all U.S. producers' national shipments, by quantity, increased annually from 2022 to 2024 but remained just below \*\*\* percent, and were higher in interim 2025 than in interim 2024. Within region U.S. producers' market share remained constant from 2022 to 2023 at \*\*\* percent and decreased from 2023 to 2024 to \*\*\* percent, decreasing overall during 2022 to 2024 by \*\*\* percentage points, but was higher in interim 2025 compared to interim 2024, reaching a peak of \*\*\* percent. Out-of-region U.S. producers' market share of national apparent U.S. consumption increased annually from 2022 to 2024 from \*\*\* percent to \*\*\* percent but was slightly lower in interim 2025 compared to interim 2024.

From 2022 to 2024, the share of national apparent U.S. consumption held by U.S. imports from Mexico decreased annually, from \*\*\* percent in 2022 to \*\*\* percent in 2024, with most of the decrease occurring from 2022 to 2023, while the share of the national market held by U.S. imports from nonsubject sources remained relatively constant between 2022 and 2024, between \*\*\* percent and \*\*\* percent. The shares of the national market held by U.S. imports from Mexico and nonsubject sources were both lower in interim 2025 than in interim 2024, by \*\*\* percentage points and \*\*\* percentage points, respectively.

All U.S. producers' national U.S. shipments, by quantity, increased annually from 2022 to 2024, and was higher in interim 2025 than in interim 2024. While the quantity of within region U.S. producers' national U.S. shipments increased irregularly during 2022 to 2022, out-of-region U.S. producers' national U.S. shipments of fresh winter strawberries increased annually, both of which increased overall during 2022 to 2024. Within region U.S. producers' national U.S. shipments of fresh winter strawberries were higher in interim 2025 than 2024, while out-of-region U.S. producers' U.S. shipments were lower.

The quantity of U.S. importers' national U.S. shipments from Mexico decreased from 2022 to 2023 and increased from 2023 to 2024, increasing overall during 2022 to 2024, while U.S. importers' national U.S. shipments from nonsubject sources increased annually. U.S. importers' national U.S. shipments from Mexico and nonsubject sources were both lower in interim 2025 than in interim 2024.

**Table 4.12 Fresh winter strawberries: National apparent U.S. consumption and market shares based on quantity data, by source and period**

Quantity in 1,000 pounds; shares in percent; interim is January through September

Source	Measure	2022	2023	2024	Interim 2024	Interim 2025
U.S. producers: Located within region	Quantity	***	***	***	***	***
U.S. producers: Located out-of-region	Quantity	***	***	***	***	***
U.S. producers: Located throughout U.S.	Quantity	***	***	***	***	***
Mexico	Quantity	421,065	401,295	468,374	338,781	322,992
Nonsubject sources	Quantity	5,072	5,278	5,545	3,416	2,201
All import sources	Quantity	426,138	406,573	473,920	342,197	325,193
All sources	Quantity	***	***	***	***	***
U.S. producers: Located within region	Share	***	***	***	***	***
U.S. producers: Located out-of-region	Share	***	***	***	***	***
U.S. producers: Located throughout U.S.	Share	***	***	***	***	***
Mexico	Share	***	***	***	***	***
Nonsubject sources	Share	***	***	***	***	***
All import sources	Share	***	***	***	***	***
All sources	Share	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires for U.S. producers' U.S. shipments data and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, limited to October through March. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values.

**Figure 4.5 Fresh winter strawberries: National apparent U.S. consumption based on value, by source and period**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires for U.S. producers' U.S. shipments data and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, limited to October through March for U.S. imports data. Imports are based on the imports for consumption data series.

### **Value**

Table 4.13 and figure 4.6 present data on national apparent U.S. consumption and U.S. market shares by value for fresh winter strawberries. National apparent U.S. consumption, by value, increased annually from 2022 to 2024 but was lower in interim 2025 than in interim 2024.

The share of the value of national apparent U.S. consumption of all U.S. producers increased annually and was higher in interim 2025 compared to interim 2024. The share held by within region and out-of-region U.S. producers' national shipments were comparable during 2022 to 2024, but within region U.S. producers had a notably higher market share than out-of-region U.S. producers in the interim periods. The share of national apparent U.S. consumption accounted for by within region U.S. producers increased from \*\*\* percent in 2022 to \*\*\* percent in 2023 and decreased to \*\*\* percent in 2024, decreasing overall by \*\*\* percentage points during 2022 to 2024. Oppositely, the share of national apparent U.S. consumption of out-of-region U.S. producers remained relatively constant in 2022 and 2023 and increased from 2023 to 2024, increasing overall by \*\*\* percentage points during 2022 to 2024. The share of

the value of national apparent U.S. consumption for both within and out-of-region U.S. producers, and thus all U.S. producers, were higher in interim 2025 than interim 2024.

From 2022 to 2024, the share of the national apparent U.S. consumption market held by U.S. imports from Mexico decreased annually, while the share of U.S. imports from nonsubject sources increased slightly from 2022 to 2023 and remained relatively constant from 2023 to 2024. The share of the within region market held by U.S. imports from Mexico and nonsubject sources were both lower in interim 2025 than in interim 2024.

Both within and out-of-region U.S. producers' national U.S. shipments, by value, increased overall from 2022 to 2024, except a decrease in within region U.S. producers' national U.S. shipments from 2023 to 2024, and were higher in interim 2025 than in interim 2024. Similarly, the value of U.S. importers' national U.S. shipments from Mexico and nonsubject sources increased annually from 2022 to 2024 but were both lower in interim 2025 than in interim 2024.

**Table 4.13 Fresh winter strawberries: National apparent U.S. consumption and market shares based on value data, by source and period**

Quantity in 1,000 pounds; shares in percent; interim is January through September

Source	Measure	2022	2023	2024	Interim 2024	Interim 2025
U.S. producers: Located within region	Value	***	***	***	***	***
U.S. producers: Located out-of-region	Value	***	***	***	***	***
U.S. producers: Located throughout U.S.	Value	***	***	***	***	***
Mexico	Value	918,796	930,527	1,049,108	716,577	657,243
Nonsubject sources	Value	12,463	16,925	18,029	11,370	8,408
All import sources	Value	931,259	947,451	1,067,137	727,947	665,651
All sources	Value	***	***	***	***	***
U.S. producers: Located within region	Share	***	***	***	***	***
U.S. producers: Located out-of-region	Share	***	***	***	***	***
U.S. producers: Located throughout U.S.	Share	***	***	***	***	***
Mexico	Share	***	***	***	***	***
Nonsubject sources	Share	***	***	***	***	***
All import sources	Share	***	***	***	***	***
All sources	Share	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires for U.S. producers' U.S. shipments data and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, limited to October through March. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values.

**Figure 4.6 Fresh winter strawberries: National apparent U.S. consumption based on value, by source and period**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires for U.S. producers' U.S. shipments data and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, limited to October through March for U.S. imports data. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values.

## **Part 5: Pricing data**

### **Factors affecting prices**

#### **Transportation costs to the U.S. market**

Transportation costs for fresh winter strawberries shipped from Mexico to the United States averaged 2.4 percent during 2024. These estimates were derived from official import data and represent transportation and other charges on imports.<sup>1</sup>

#### **U.S. inland transportation costs**

The majority of responding U.S. producers (within and out-of-region) and importers reported that they typically arrange transportation to their customers. Most U.S. producers reported that their U.S. inland transportation costs ranged from 2.0 to 15.0 percent while most importers reported costs of 3.0 to 20.0 percent.

### **Pricing practices**

#### **Pricing methods**

U.S. producers (within-region and out of region) and importers reported setting prices using transaction-by-transaction negotiations, contracts, and other methods (table 5.1). U.S. producers that reported using other methods to set prices generally described that prices are set through negotiations with marketing firms or exclusive distributors. Importers that reported setting prices using other methods described using quotes that cover a specific period of time and applying the prices that are set by the market.

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<sup>1</sup> The estimated transportation costs were obtained by subtracting the customs value from the c.i.f. value of the imports for 2024 and then dividing by the customs value based on the HTS statistical reporting number 0810.10.2020, 0810.10.2040, 0810.10.2060, 0810.10.2080, 0810.10.4020, 0810.10.4040, 0810.10.4060 and 0810.10.4080.

**Table 5.1 Fresh winter strawberries: Count of U.S. producers' and importers' reported price setting methods**

Method	Within region U.S. producers	National U.S. producers	Importers
Transaction-by-transaction	11	12	13
Contract	7	7	8
Set price list	1	2	4
Other	5	23	3
Responding firms	17	36	14

Source: Compiled from data submitted in response to Commission questionnaires.

Note: The sum of responses down may not add up to the total number of responding firms as each firm was instructed to check all applicable price setting methods employed.

U.S. producers and importers reported selling the vast majority of their fresh winter strawberries in the spot market and under short-term contracts (table 5.2).

**Table 5.2 Fresh winter strawberries: U.S. producers' and importers' shares of commercial U.S. shipments by type of sale, 2024**

Share in percent

Type of sale	Within region U.S. producers	National U.S. producers	Subject importers
Long-term contracts	***	***	***
Annual contracts	***	***	***
Short-term contracts	***	***	***
Spot sales	***	***	***
Total	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Because of rounding, figures may not add to the totals shown.

The majority of U.S. producers reported that their short-term, annual, and long-term contracts fixed both price and quantity, did not allow price renegotiation, and did not index prices to raw materials. U.S. producers reported that short-term contracts typically last between 7 and 180 days and that long-term contracts typically last just over a year.

At least half of importers reported that their short-term, annual, and long-term contracts fix both price and quantity but allow price renegotiation. Most importers reported that their short-term contracts did not index prices to raw materials but their annual and long-term contracts did.

## Sales terms and discounts

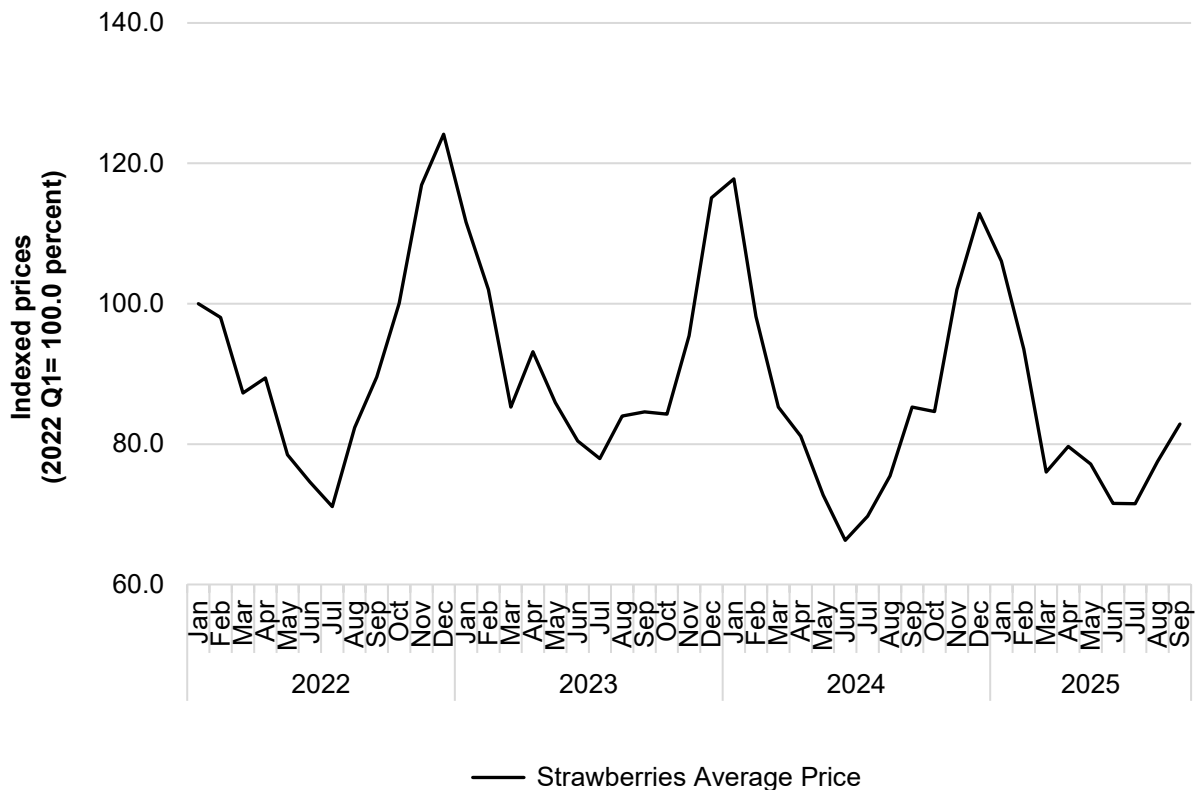
U.S. producers typically quote prices on a delivered basis, while importers typically quote prices on an f.o.b. basis. The majority of U.S. producers and importers reported having no discount policy.

## Price data

### National price data

The indexed average price of all fresh strawberries in the United States is shown on figure 5.1 and table 5.3. The prices of fresh strawberries in the United States follow a seasonal pattern, with prices falling in summer months and increasing in the winter months in accordance with growing seasons. While this annual pattern held constant in each year of the investigation, the high points of average price of fresh strawberries in the United States were lower in each year than the previous year. Importer and purchaser Walmart described strawberries' retail pricing as driven by "quality, reliability of supply, and program commitments."<sup>2</sup>

**Figure 5.1 All fresh strawberries: Indexed average U.S. city price of all fresh strawberries, by month**



Source: U.S. Bureau of Labor Statistics, Average Price: Strawberries, Dry Pint (Cost per 12 Ounces/340.2 Grams) in U.S. City Average \*\*\*, retrieved from FRED, Federal Reserve Bank of St. Louis; <https://fred.stlouisfed.org/series/APU0000711415>, accessed January 14, 2026.

<sup>2</sup> Walmart postconference brief, pp. 2-3.

**Table 5.3: All fresh strawberries: Indexed average U.S. city price of all fresh strawberries, by month**

Indexed price in percent, 2022 Q1= 100.0

Month	2022	2023	2024	2025
January	100.0	111.6	117.8	106.1
February	98.0	102.0	98.2	93.5
March	87.3	85.3	85.3	76.0
April	89.4	93.2	81.1	79.7
May	78.5	85.9	72.7	77.2
June	74.6	80.5	66.3	71.6
July	71.1	77.9	69.7	71.5
August	82.4	84.0	75.5	77.5
September	89.6	84.6	85.3	82.8
October	100.1	84.3	84.6	NA
November	116.9	95.5	102.0	NA
December	124.1	115.1	112.8	NA

Source: U.S. Bureau of Labor Statistics, Average Price: Strawberries, Dry Pint (Cost per 12 Ounces/340.2 Grams) in U.S. City Average \*\*\*, retrieved from FRED, Federal Reserve Bank of St. Louis; <https://fred.stlouisfed.org/series/APU0000711415>, accessed January 14, 2026.

## Commission price data

The Commission requested that U.S. producers and importers provide monthly data for the total quantity and f.o.b. value of the following fresh winter strawberries products shipped to unrelated U.S. customers during January 2022 to September 2025.

**Product 1.**— Non-organic flat-pack conventional (8-1 lb) fresh winter strawberry, sold to distributors per pound

**Product 2.**-- Non-organic flat-pack conventional (8-1 lb) fresh winter strawberry, sold to retailers, grocery stores, and other end users (e.g., food processors) per pound

Eleven U.S. producers and 10 importers provided usable pricing data for sales of the requested products, although not all firms reported pricing for all products for all quarters.<sup>3</sup> Pricing data reported by these firms accounted for approximately 69.2 percent of U.S. producers' U.S. shipments of fresh winter strawberries across the nation and 43.2 percent of U.S. shipments of subject imports from Mexico across the nation in 2024.<sup>4</sup> Price data for products 1 and 2 are presented in tables 5.4 to 5.7 and figures 5.2 to 5.7.<sup>5 6 7 8</sup>

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<sup>3</sup> Per-unit pricing data are calculated from total quantity and total value data provided by U.S. producers and importers. The precision and variation of these figures may be affected by rounding, limited quantities, and producer or importer estimates.

<sup>4</sup> Pricing coverage is based on U.S. shipments reported in questionnaires.

<sup>5</sup> Staff excluded \*\*\* pricing data for non-winter months due to it reporting very large volumes, on non-winter months.

<sup>6</sup> Staff excluded some pricing data from U.S. producer \*\*\* due to missing or anomalous quantities and values on certain periods.

<sup>7</sup> Staff excluded some pricing data from U.S. producer \*\*\* due to anomalous prices.

<sup>8</sup> Appendix F presents related party exclusion pricing product data for \*\*\*.

**Table 5.4 Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 1 and margins of underselling/(overselling), sold within region by source and month**

Price in dollars per pound, quantity in pounds.

<b>Period</b>	<b>Within region U.S. producers sold within region: Price</b>	<b>Within region U.S. producers sold within region: Quantity</b>	<b>Out-of-region U.S. producers sold within region: Price</b>	<b>Out-of-region U.S. producers sold within region: Quantity</b>	<b>All U.S. producers sold within region: Price</b>	<b>All U.S. producers sold within region: Quantity</b>
January 2022	***	***	***	***	***	***
February 2022	***	***	***	***	***	***
March 2022	***	***	***	***	***	***
April 2022	***	***	***	***	***	***
May 2022	***	***	***	***	***	***
June 2022	***	***	***	***	***	***
July 2022	***	***	***	***	***	***
August 2022	***	***	***	***	***	***
September 2022	***	***	***	***	***	***
October 2022	***	***	***	***	***	***
November 2022	***	***	***	***	***	***
December 2022	***	***	***	***	***	***
January 2023	***	***	***	***	***	***
February 2023	***	***	***	***	***	***
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June 2023	***	***	***	***	***	***
July 2023	***	***	***	***	***	***
August 2023	***	***	***	***	***	***
September 2023	***	***	***	***	***	***
October 2023	***	***	***	***	***	***
November 2023	***	***	***	***	***	***
December 2023	***	***	***	***	***	***

Table continued.

**Table 5.4 (Continued) Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 1 and margins of underselling/(overselling), sold within region by source and month**

Price in dollars per pound, quantity in pounds, margin in percent.

Period	Mexico sold within region: Price	Mexico sold within region: Quantity	Mexico sold within region: Margin to within region U.S. producers	Mexico sold within region: Margin to out-of-region U.S. producers	Mexico sold within region: Margin to all U.S. producers sold within region
January 2022	***	***	***	***	***
February 2022	***	***	***	***	***
March 2022	***	***	***	***	***
April 2022	***	***	***	***	***
May 2022	***	***	***	***	***
June 2022	***	***	***	***	***
July 2022	***	***	***	***	***
August 2022	***	***	***	***	***
September 2022	***	***	***	***	***
October 2022	***	***	***	***	***
November 2022	***	***	***	***	***
December 2022	***	***	***	***	***
January 2023	***	***	***	***	***
February 2023	***	***	***	***	***
March 2023	***	***	***	***	***
April 2023	***	***	***	***	***
May 2023	***	***	***	***	***
June 2023	***	***	***	***	***
July 2023	***	***	***	***	***
August 2023	***	***	***	***	***
September 2023	***	***	***	***	***
October 2023	***	***	***	***	***
November 2023	***	***	***	***	***
December 2023	***	***	***	***	***

Table continued.

**Table 5.4 (Continued) Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 1 and margins of underselling/(overselling), sold within region by source and month**

Price in dollars per pound, quantity in pounds

<b>Period</b>	<b>Within region U.S. producers sold within region: Price</b>	<b>Within region U.S. producers sold within region: Quantity</b>	<b>Out-of-region U.S. producers sold within region: Price</b>	<b>Out-of-region U.S. producers sold within region: Quantity</b>	<b>All U.S. producers sold within region: Price</b>	<b>All U.S. producers sold within region: Quantity</b>
January 2024	***	***	***	***	***	***
February 2024	***	***	***	***	***	***
March 2024	***	***	***	***	***	***
April 2024	***	***	***	***	***	***
May 2024	***	***	***	***	***	***
June 2024	***	***	***	***	***	***
July 2024	***	***	***	***	***	***
August 2024	***	***	***	***	***	***
September 2024	***	***	***	***	***	***
October 2024	***	***	***	***	***	***
November 2024	***	***	***	***	***	***
December 2024	***	***	***	***	***	***
January 2025	***	***	***	***	***	***
February 2025	***	***	***	***	***	***
March 2025	***	***	***	***	***	***
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May 2025	***	***	***	***	***	***
June 2025	***	***	***	***	***	***
July 2025	***	***	***	***	***	***
August 2025	***	***	***	***	***	***
September 2025	***	***	***	***	***	***

Table continued.

**Table 5.4 (Continued) Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 1 and margins of underselling/(overselling), sold within region by source and month**

Price in dollars per pound, quantity in pounds, margin in percent.

Period	Mexico sold within region: Price	Mexico sold within region: Quantity	Mexico sold within region: Margin to within region U.S. producers	Mexico sold within region: Margin to out-of-region U.S. producers	Mexico sold within region: Margin to all U.S. producers sold within region
January 2024	***	***	***	***	***
February 2024	***	***	***	***	***
March 2024	***	***	***	***	***
April 2024	***	***	***	***	***
May 2024	***	***	***	***	***
June 2024	***	***	***	***	***
July 2024	***	***	***	***	***
August 2024	***	***	***	***	***
September 2024	***	***	***	***	***
October 2024	***	***	***	***	***
November 2024	***	***	***	***	***
December 2024	***	***	***	***	***
January 2025	***	***	***	***	***
February 2025	***	***	***	***	***
March 2025	***	***	***	***	***
April 2025	***	***	***	***	***
May 2025	***	***	***	***	***
June 2025	***	***	***	***	***
July 2025	***	***	***	***	***
August 2025	***	***	***	***	***
September 2025	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 1: Non-organic flat-pack conventional (8-1 lb) fresh winter strawberry, sold to distributors per pound.

**Figure 5.2 Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic within region producers only and imported product 1 sold within region, by source and month**

**Price of product 1**

\* \* \* \* \*

**Volume of product 1**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 1: Non-organic flat-pack conventional (8-1 lb) fresh winter strawberry, sold to distributors per pound

**Figure 5.3 Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 1 sold within region, by source and month**

**Price of product 1**

\* \* \* \* \*

**Volume of product 1**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 1: Non-organic flat-pack conventional (8-1 lb) fresh winter strawberry, sold to distributors per pound

**Table 5.5 Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 2 and margins of underselling/(overselling), sold within region by source and month**

Price in dollars per pound, quantity in pounds

<b>Period</b>	<b>Within region U.S. producers sold within region: Price</b>	<b>Within region U.S. producers sold within region: Quantity</b>	<b>Out-of-region U.S. producers sold within region: Price</b>	<b>Out-of-region U.S. producers sold within region: Quantity</b>	<b>All U.S. producers sold within region: Price</b>	<b>All U.S. producers sold within region: Quantity</b>
January 2022	***	***	***	***	***	***
February 2022	***	***	***	***	***	***
March 2022	***	***	***	***	***	***
April 2022	***	***	***	***	***	***
May 2022	***	***	***	***	***	***
June 2022	***	***	***	***	***	***
July 2022	***	***	***	***	***	***
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January 2023	***	***	***	***	***	***
February 2023	***	***	***	***	***	***
March 2023	***	***	***	***	***	***
April 2023	***	***	***	***	***	***
May 2023	***	***	***	***	***	***
June 2023	***	***	***	***	***	***
July 2023	***	***	***	***	***	***
August 2023	***	***	***	***	***	***
September 2023	***	***	***	***	***	***
October 2023	***	***	***	***	***	***
November 2023	***	***	***	***	***	***
December 2023	***	***	***	***	***	***

Table continued.

**Table 5.5 (Continued) Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 2 and margins of underselling/(overselling), sold within region by source and month**

Price in dollars per pound, quantity in pounds, margin in percent.

Period	Mexico sold within region: Price	Mexico sold within region: Quantity	Mexico sold within region: Margin to within region U.S. producers	Mexico sold within region: Margin to out-of-region U.S. producers	Mexico sold within region: Margin to all U.S. producers sold within region
January 2022	***	***	***	***	***
February 2022	***	***	***	***	***
March 2022	***	***	***	***	***
April 2022	***	***	***	***	***
May 2022	***	***	***	***	***
June 2022	***	***	***	***	***
July 2022	***	***	***	***	***
August 2022	***	***	***	***	***
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July 2023	***	***	***	***	***
August 2023	***	***	***	***	***
September 2023	***	***	***	***	***
October 2023	***	***	***	***	***
November 2023	***	***	***	***	***
December 2023	***	***	***	***	***

Table continued.

**Table 5.5 (Continued) Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 2 and margins of underselling/(overselling), sold within region by source and month**

Price in dollars per pound, quantity in pounds

<b>Period</b>	<b>Within region U.S. producers sold within region: Price</b>	<b>Within region U.S. producers sold within region: Quantity</b>	<b>Out-of-region U.S. producers sold within region: Price</b>	<b>Out-of-region U.S. producers sold within region: Quantity</b>	<b>All U.S. producers sold within region: Price</b>	<b>All U.S. producers sold within region: Quantity</b>
January 2024	***	***	***	***	***	***
February 2024	***	***	***	***	***	***
March 2024	***	***	***	***	***	***
April 2024	***	***	***	***	***	***
May 2024	***	***	***	***	***	***
June 2024	***	***	***	***	***	***
July 2024	***	***	***	***	***	***
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December 2024	***	***	***	***	***	***
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June 2025	***	***	***	***	***	***
July 2025	***	***	***	***	***	***
August 2025	***	***	***	***	***	***
September 2025	***	***	***	***	***	***

Table continued.

**Table 5.5 (Continued) Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 2 and margins of underselling/(overselling), sold within region by source and month**

Price in dollars per pound, quantity in pounds, margin in percent.

Period	Mexico sold within region: Price	Mexico sold within region: Quantity	Mexico sold within region: Margin to within region U.S. producers	Mexico sold within region: Margin to out-of-region U.S. producers	Mexico sold within region: Margin to all U.S. producers sold within region
January 2024	***	***	***	***	***
February 2024	***	***	***	***	***
March 2024	***	***	***	***	***
April 2024	***	***	***	***	***
May 2024	***	***	***	***	***
June 2024	***	***	***	***	***
July 2024	***	***	***	***	***
August 2024	***	***	***	***	***
September 2024	***	***	***	***	***
October 2024	***	***	***	***	***
November 2024	***	***	***	***	***
December 2024	***	***	***	***	***
January 2025	***	***	***	***	***
February 2025	***	***	***	***	***
March 2025	***	***	***	***	***
April 2025	***	***	***	***	***
May 2025	***	***	***	***	***
June 2025	***	***	***	***	***
July 2025	***	***	***	***	***
August 2025	***	***	***	***	***
September 2025	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 2: Non-organic flat-pack conventional (8-1 lb) fresh winter strawberry, sold to retailers, grocery stores, and other end users (e.g., food processors) per pound

**Figure 5.4 Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic within region producers only and imported product 2 sold within region, by source and month**

**Price of product 2**

\* \* \* \* \*

**Volume of product 2**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 2: Non-organic flat-pack conventional (8-1 lb) fresh winter strawberry, sold to retailers, grocery stores, and other end users (e.g., food processors) per pound

**Figure 5.5 Fresh winter strawberries: Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 2 sold within region, by source and month**

**Price of product 2**

\* \* \* \* \*

**Volume of product 2**

\* \* \* \* \*

**Table 5.6 Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 1 and margins of underselling/(overselling), sold nationally, by source and month**

Price in dollars per pound, quantity in pounds, margin in percent.

Period	U.S. price	U.S. quantity	Mexico price	Mexico quantity	Mexico margin
January 2022	***	***	***	***	***
February 2022	***	***	***	***	***
March 2022	***	***	***	***	***
April 2022	***	***	***	***	***
May 2022	***	***	***	***	***
June 2022	***	***	***	***	***
July 2022	***	***	***	***	***
August 2022	***	***	***	***	***
September 2022	***	***	***	***	***
October 2022	***	***	***	***	***
November 2022	***	***	***	***	***
December 2022	***	***	***	***	***
January 2023	***	***	***	***	***
February 2023	***	***	***	***	***
March 2023	***	***	***	***	***
April 2023	***	***	***	***	***
May 2023	***	***	***	***	***
June 2023	***	***	***	***	***
July 2023	***	***	***	***	***
August 2023	***	***	***	***	***
September 2023	***	***	***	***	***
October 2023	***	***	***	***	***
November 2023	***	***	***	***	***
December 2023	***	***	***	***	***

Table continued.

**Table 5.6 (Continued) Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 1 and margins of underselling/(overselling), sold nationally, by source and month**

Price in dollars per pound, quantity in pounds, margin in percent.

Period	U.S. price	U.S. quantity	Mexico price	Mexico quantity	Mexico margin
January 2024	***	***	***	***	***
February 2024	***	***	***	***	***
March 2024	***	***	***	***	***
April 2024	***	***	***	***	***
May 2024	***	***	***	***	***
June 2024	***	***	***	***	***
July 2024	***	***	***	***	***
August 2024	***	***	***	***	***
September 2024	***	***	***	***	***
October 2024	***	***	***	***	***
November 2024	***	***	***	***	***
December 2024	***	***	***	***	***
January 2025	***	***	***	***	***
February 2025	***	***	***	***	***
March 2025	***	***	***	***	***
April 2025	***	***	***	***	***
May 2025	***	***	***	***	***
June 2025	***	***	***	***	***
July 2025	***	***	***	***	***
August 2025	***	***	***	***	***
September 2025	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 1: Non-organic flat-pack conventional (8-1 lb) fresh winter strawberry, sold to distributors per pound

**Figure 5.6 Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 1 sold nationally, by source and month**

**Price of product 1**

\* \* \* \* \*

**Volume of product 1**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 1: Non-organic flat-pack conventional (8-1 lb) fresh winter strawberry, sold to distributors per pound

**Table 5.7 Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 2 and margins of underselling/(overselling), sold nationally, by source and month**

Price in dollars per pound, quantity in pounds, margin in percent.

Period	U.S. price	U.S. quantity	Mexico price	Mexico quantity	Mexico margin
January 2022	***	***	***	***	***
February 2022	***	***	***	***	***
March 2022	***	***	***	***	***
April 2022	***	***	***	***	***
May 2022	***	***	***	***	***
June 2022	***	***	***	***	***
July 2022	***	***	***	***	***
August 2022	***	***	***	***	***
September 2022	***	***	***	***	***
October 2022	***	***	***	***	***
November 2022	***	***	***	***	***
December 2022	***	***	***	***	***
January 2023	***	***	***	***	***
February 2023	***	***	***	***	***
March 2023	***	***	***	***	***
April 2023	***	***	***	***	***
May 2023	***	***	***	***	***
June 2023	***	***	***	***	***
July 2023	***	***	***	***	***
August 2023	***	***	***	***	***
September 2023	***	***	***	***	***
October 2023	***	***	***	***	***
November 2023	***	***	***	***	***
December 2023	***	***	***	***	***

Table continued.

**Table 5.7 (Continued) Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 2 and margins of underselling/(overselling), sold nationally, by source and month**

Price in dollars per pound, quantity in pounds, margin in percent.

Period	U.S. price	U.S. quantity	Mexico price	Mexico quantity	Mexico margin
January 2024	***	***	***	***	***
February 2024	***	***	***	***	***
March 2024	***	***	***	***	***
April 2024	***	***	***	***	***
May 2024	***	***	***	***	***
June 2024	***	***	***	***	***
July 2024	***	***	***	***	***
August 2024	***	***	***	***	***
September 2024	***	***	***	***	***
October 2024	***	***	***	***	***
November 2024	***	***	***	***	***
December 2024	***	***	***	***	***
January 2025	***	***	***	***	***
February 2025	***	***	***	***	***
March 2025	***	***	***	***	***
April 2025	***	***	***	***	***
May 2025	***	***	***	***	***
June 2025	***	***	***	***	***
July 2025	***	***	***	***	***
August 2025	***	***	***	***	***
September 2025	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 2: Non-organic flat-pack conventional (8-1 lb) fresh winter strawberry, sold to retailers, grocery stores, and other end users (e.g., food processors) per pound

**Figure 5.7 Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 2 sold nationally, by source and month**

**Price of product 2**

\* \* \* \* \*

**Volume of product 2**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 2: Non-organic flat-pack conventional (8-1 lb) fresh winter strawberry, sold to retailers, grocery stores, and other end users (e.g., food processors) per pound

## Price trends

On an annual basis, prices for fresh winter strawberries generally increased between January 2022 and January 2023. Price changes for fresh winter strawberries were mixed between January 2023 and January 2024. Prices decreased for fresh winter strawberries between January 2024 and September 2025 (table 5.8 and table 5.9). Comparisons by month of price changes over the period in price data sold nationally are shown on table 5.10. As previously noted, the price of strawberries follows an annual pattern in accordance with growing seasons. Indexed pricing data (tables 5.11 and 5.12) indicate that prices for U.S. produced and imported fresh winter strawberries generally increased over the period, reaching higher peaks than in the peak in 2022 in each subsequent covered by the investigation.<sup>9</sup>

**Table 5.8 Fresh winter strawberries: Summary of price data sold within region, by product, region and source, January 2022 to September 2025**

Quantity in pounds, price in dollars per pound

Product	Source	Number of months	Quantity	Low price	High price
Product 1	Within region U.S. producers	25	***	***	***
Product 1	All U.S. producers	26	***	***	***
Product 1	Mexico	31	***	***	***
Product 2	Within region U.S. producers	22	***	***	***
Product 2	All U.S. producers	25	***	***	***
Product 2	Mexico	34	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

**Table 5.9 Fresh winter strawberries: Summary of price data sold nationally, by product, region and source, January 2022 to September 2025**

Quantity in pounds, price in dollars per pound

Product	Source	Number of months	Quantity	Low price	High price
Product 1	United States	26	***	***	***
Product 1	Mexico	33	***	***	***
Product 2	United States	25	***	***	***
Product 2	Mexico	34	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

<sup>9</sup> Non-winter months removed from figures.

**Table 5.10 Fresh winter strawberries: Summary of price data sold nationally, by comparison month, product and source, January 2022 through September 2025,**

Prices in dollars per pound; change in percent

Comparison month	Product	Source	First price (2022)	Last price (see note)	Change over period within comparison month
January	Product 1	United States	***	***	▲***
February	Product 1	United States	***	***	▲***
March	Product 1	United States	***	***	▼***
October	Product 1	United States	***	***	▼***
November	Product 1	United States	***	***	▼***
December	Product 1	United States	***	***	▼***
January	Product 1	Mexico	***	***	▼***
February	Product 1	Mexico	***	***	▼***
March	Product 1	Mexico	***	***	▼***
October	Product 1	Mexico	***	***	▼***
November	Product 1	Mexico	***	***	▼***
December	Product 1	Mexico	***	***	▲***
January	Product 2	United States	***	***	▲***
February	Product 2	United States	***	***	▼***
March	Product 2	United States	***	***	▲***
October	Product 2	United States	***	***	▼***
November	Product 2	United States	***	***	▼***
December	Product 2	United States	***	***	▼***
January	Product 2	Mexico	***	***	▲***
February	Product 2	Mexico	***	***	▼***
March	Product 2	Mexico	***	***	▼***
October	Product 2	Mexico	***	***	▼***
November	Product 2	Mexico	***	***	▼***
December	Product 2	Mexico	***	***	▲***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: January – March comparisons are from 2022 to 2025. October – December comparisons are from 2022 to 2024 due to data availability. Shares and ratios shown as “0.0” represent values greater than zero, but less than “0.05” percent. Percent change is the change from the first month to the last month of the data collection period.

**Table 5.11 Fresh winter strawberries: Indexed U.S. producer prices, by month**

Index in percent, January 2022 = 100.0 percent

Period	Product 1: Sold within region	Product 2: Sold within region	Product 1: National	Product 2: National
January 2022	100.0	100.0	100.0	100.0
February 2022	***	***	***	***
March 2022	***	***	***	***
April 2022	***	***	***	***
May 2022	***	***	***	***
June 2022	***	***	***	***
July 2022	***	***	***	***
August 2022	***	***	***	***
September 2022	***	***	***	***
October 2022	***	***	***	***
November 2022	***	***	***	***
December 2022	***	***	***	***
January 2023	***	***	***	***
February 2023	***	***	***	***
March 2023	***	***	***	***
April 2023	***	***	***	***
May 2023	***	***	***	***
June 2023	***	***	***	***
July 2023	***	***	***	***
August 2023	***	***	***	***
September 2023	***	***	***	***
October 2023	***	***	***	***
November 2023	***	***	***	***
December 2023	***	***	***	***

Table continued.

**Table 5.11 (Continued) Fresh winter strawberries: Indexed U.S. producer prices, by month**

Index in percent. January 2022 = 100.0 percent.

Period	Product 1: Sold within region	Product 2: Sold within region	Product 1: National	Product 2: National
January 2024	***	***	***	***
February 2024	***	***	***	***
March 2024	***	***	***	***
April 2024	***	***	***	***
May 2024	***	***	***	***
June 2024	***	***	***	***
July 2024	***	***	***	***
August 2024	***	***	***	***
September 2024	***	***	***	***
October 2024	***	***	***	***
November 2024	***	***	***	***
December 2024	***	***	***	***
January 2025	***	***	***	***
February 2025	***	***	***	***
March 2025	***	***	***	***
April 2025	***	***	***	***
May 2025	***	***	***	***
June 2025	***	***	***	***
July 2025	***	***	***	***
August 2025	***	***	***	***
September 2025	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

**Figure 5.8 Fresh winter strawberries: Indexed U.S. producer prices, by winter month**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Figure shows indexed producer prices for winter months only.

**Table 5.12 Fresh winter strawberries: Indexed U.S. importer prices, by month**

Index in percent, January 2022= 100.0 percent

Period	Product 1: Sold within region	Product 2: Sold within region	Product 1: National	Product 2: National
January 2022	100.0	100.0	100.0	100.0
February 2022	***	***	***	***
March 2022	***	***	***	***
April 2022	***	***	***	***
May 2022	***	***	***	***
June 2022	***	***	***	***
July 2022	***	***	***	***
August 2022	***	***	***	***
September 2022	***	***	***	***
October 2022	***	***	***	***
November 2022	***	***	***	***
December 2022	***	***	***	***
January 2023	***	***	***	***
February 2023	***	***	***	***
March 2023	***	***	***	***
April 2023	***	***	***	***
May 2023	***	***	***	***
June 2023	***	***	***	***
July 2023	***	***	***	***
August 2023	***	***	***	***
September 2023	***	***	***	***
October 2023	***	***	***	***
November 2023	***	***	***	***
December 2023	***	***	***	***

Table continued.

**Table 5.12 (Continued) Fresh winter strawberries: Indexed U.S. importer prices, by month**

Index in percent, January 2022= 100.0 percent

<b>Period</b>	<b>Product 1: Sold within region</b>	<b>Product 2: Sold within region</b>	<b>Product 1: National</b>	<b>Product 2: National</b>
January 2024	***	***	***	***
February 2024	***	***	***	***
March 2024	***	***	***	***
April 2024	***	***	***	***
May 2024	***	***	***	***
June 2024	***	***	***	***
July 2024	***	***	***	***
August 2024	***	***	***	***
September 2024	***	***	***	***
October 2024	***	***	***	***
November 2024	***	***	***	***
December 2024	***	***	***	***
January 2025	***	***	***	***
February 2025	***	***	***	***
March 2025	***	***	***	***
April 2025	***	***	***	***
May 2025	***	***	***	***
June 2025	***	***	***	***
July 2025	***	***	***	***
August 2025	***	***	***	***
September 2025	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

**Figure 5.9 Fresh winter strawberries: Indexed U.S. importer prices, by month**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Figure shows indexed importer prices for winter months only.

## Price comparisons

As shown in table 5.13, prices for product imported from Mexico were below those for U.S.-produced product sold within the region in 14 of 51 instances (\*\* pounds); margins of underselling ranged from \*\* to \*\* percent. In the remaining 37 instances (\*\* pounds), prices for product from Mexico were between \*\* and \*\* percent above prices for the domestic product sold in the region.

**Table 5.13 Fresh winter strawberries: Instances and quantities of underselling/overselling and the range and average of margins for sales within region, by product**

Quantity in pounds; margin in percent

Product	Type	Number of instances	Quantity	Average margin	Min margin	Max margin
Product 1	Underselling	11	**	**	**	**
Product 2	Underselling	3	**	**	**	**
Total, all products	Underselling	14	**	**	**	**
Product 1	Overselling	15	**	**	**	**
Product 2	Overselling	22	**	**	**	**
Total, all products	Overselling	37	**	**	**	**

Source: Compiled from data submitted in response to Commission questionnaires.

Note: These data include only quarters in which there is a comparison between the U.S. and subject product.

As shown in table 5.14, prices for product imported from Mexico were below those for U.S.-produced product sold across the nation in 14 of 51 instances (\*\* pounds); margins of underselling ranged from \*\* to \*\* percent. In the remaining 37 instances (\*\* pounds), prices for product from Mexico were between \*\* and \*\* percent above prices for the domestic product sold across the nation.

**Table 5.14 Fresh winter strawberries: Instances and quantities of underselling/overselling and the range and average of margins for sales nationally (regardless of region), by product**

Quantity in pounds; margin in percent

Product	Type	Number of instances	Quantity	Average margin	Min margin	Max margin
Product 1	Underselling	10	***	***	***	***
Product 2	Underselling	4	***	***	***	***
Total, all products	Underselling	14	***	***	***	***
Product 1	Overselling	16	***	***	***	***
Product 2	Overselling	21	***	***	***	***
Total, all products	Overselling	37	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: These data include only quarters in which there is a comparison between the U.S. and subject product.

**Table 5.15 Fresh winter strawberries: Instances and quantities of underselling/overselling and the range and average of margins for sales within region, by period**

Quantity in pounds; margin in percent

Year	Type	Number of instances	Quantity	Average margin	Min margin	Max margin
2022	Underselling	5	***	***	***	***
2023	Underselling	4	***	***	***	***
2024	Underselling	1	***	***	***	***
January through September 2025	Underselling	4	***	***	***	***
All periods	Underselling	14	***	***	***	***
2022	Overselling	9	***	***	***	***
2023	Overselling	11	***	***	***	***
2024	Overselling	13	***	***	***	***
January through September 2025	Overselling	4	***	***	***	***
All periods	Overselling	37	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: These data include only quarters in which there is a comparison between the U.S. and subject product.

**Table 5.16 Fresh winter strawberries: Instances and quantities of underselling/overselling and the range and average of margins for sales nationally (regardless of region), by period**

Quantity in pounds; margin in percent

Year	Type	Number of instances	Quantity	Average margin	Min margin	Max margin
2022	Underselling	5	***	***	***	***
2023	Underselling	4	***	***	***	***
2024	Underselling	1	***	***	***	***
January through September 2025	Underselling	4	***	***	***	***
All periods	Underselling	14	***	***	***	***
2022	Overselling	9	***	***	***	***
2023	Overselling	11	***	***	***	***
2024	Overselling	13	***	***	***	***
January through September 2025	Overselling	4	***	***	***	***
All periods	Overselling	37	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: These data include only quarters in which there is a comparison between the U.S. and subject product.

## Lost sales and lost revenue

The Commission requested that U.S. producers of fresh winter strawberries report purchasers with which they experienced instances of lost sales or revenue due to competition from imports of fresh winter strawberries from Mexico during January 2022 to September 2025. Of the 39 responding U.S. producers, nine reported that they had to reduce prices, five reported that they had to roll back announced price increases, and nine firms reported that they had lost sales. Three U.S. producers submitted lost sales and lost revenue allegations. The three responding U.S. producers identified 15 firms with which they lost sales or revenue (11 consisting of lost sales allegations and 9 consisting of lost revenue allegations).

Staff contacted 15 purchasers and received responses from two purchasers. Responding purchasers reported purchasing 1.4 billion pounds of fresh winter strawberries from January 2022 to September 2025 (table 5.14)

During 2024, responding purchasers purchased 96.1 percent from U.S. producers and 3.9 percent from Mexico. Purchasers were asked about changes in their purchasing patterns from different sources since 2022. Both responding purchasers reported increasing purchases of domestic winter strawberries. Both purchasers reported that their purchases had increased as their firms grew.

Of the two responding purchasers, \*\*\* reported that, since 2022, it had purchased imported fresh winter strawberries from Mexico instead of U.S.-produced product. Additionally, it reported that subject import prices were lower than U.S.-produced product but that lower prices were not a primary reason for the decision to purchase imported product rather than U.S.-produced product. It estimated the quantity of fresh winter strawberries from Mexico purchased instead of domestic product was \*\*\* pounds (table 5.15).

Neither of the responding purchasers reported that domestic producers had reduced prices of fresh winter strawberries.

**Table 5.17 Fresh winter strawberries: National purchasers’ reported purchases and imports, by firm and source**

Quantity in 1,000 pounds, share in percent

Purchaser	Domestic: Harvested within region quantity	Domestic: Harvested out-of-region quantity	Domestic: Total quantity	Subject quantity	All other quantity	Change in subject share	Change in all other share	Change in subject share
***	***	***	***	***	***	***	***	***
***	***	***	***	***	***	***	***	***
All firms	***	***	***	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Note: Purchaser \*\*\* reported that for \*\*\*. The “all other” category includes known nonsubject sources and unknown sources. Changes in shares represent the share of the firm’s total purchases of domestic and/or subject country imports between first and last years and are presented in percentage points. Zeroes, null values, and undefined calculations are suppressed and shown as “—”.

**Table 5.18 Fresh winter strawberries: Purchasers’ responses to purchasing subject imports instead of domestic product, by firm**

Quantity in 1,000 pounds

Purchaser	Purchased subject imports instead of domestic	Imports priced lower	Choice based on price	Quantity	Explanation
***	***	***	***	***	***
***	***	***	***	***	***
All firms	***	***	***	***	NA

Source: Compiled from data submitted in response to Commission questionnaires.



## Part 6: Financial experience of U.S. producers

### Background<sup>1 2</sup>

Thirty-eight privately held U.S. producers (including two questionnaires from tolee Driscoll’s FL and Driscoll’s CA) provided usable financial results on their all strawberries operations.<sup>3 4 5</sup> Twenty-five out of 38 U.S. producers reported financial data on the basis of GAAP and 36 of 38 reported fiscal years ending on December 31st.<sup>6</sup> Five new U.S. producers

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<sup>1</sup> The following abbreviations are used in the tables and/or text of this section: fresh strawberries regardless of when they were grown/harvested or sold (“year round” or “all strawberries”), strawberries grown/harvested and sold from October 1 through March 31 (“fresh winter strawberries” or “winter strawberries”), strawberries grown/harvested and sold from April 1 through September 30 (“non-winter strawberries”), U.S. producers/growers located in states east of the Mississippi plus Louisiana and Texas (“within region producers”), producers/growers located in states west of the Mississippi excluding Louisiana and Texas (“out-of-region producers”), all producers/growers in the United States regardless of location (“national producers” or “U.S. producers”), generally accepted accounting principles (“GAAP”), fiscal year (“FY”), January 2022 to September 2025 (“period examined”), net sales (“NS” or “proceeds from deliveries/sales”), cost of goods sold (“COGS”), selling, general, and administrative expenses (“SG&A expenses”), average unit values (“AUVs”), research and development expenses (“R&D expenses”), and return on assets (“ROA”).

<sup>2</sup> Five within region producers/growers \*\*\*reported net sales of both winter and non-winter strawberries in at least one data period for which data were collected.

<sup>3</sup> \*\*\* converted from being a Upick/agritourist grower to commercial winter strawberry grower in 2024 and was unable to provide estimates for full year 2024 financial data but did provide financial results for interim periods and is included in the aggregated data for interim periods. \*\*\* U.S. producer questionnaire, 2.5, 2.13, and 3.9a.

<sup>4</sup> \*\*\* is a within region U.S. producer of winter strawberries throughout the period examined but was unable to provide sales and cost data and is therefore not included in the aggregated financial results. \*\*\* U.S. producer questionnaire, 2.5, 2.13, and 3.9a. \*\*\* accounted for approximately two percent of total shipment quantity and value in 2024. See part 3 of this report for information on \*\*\* shipments.

<sup>5</sup> Three out-of-region producers (\*\*\*) grew and sold only non-winter strawberries exclusively as tollers for Driscoll’s CA; all three are located in California. U.S. producer questionnaires, 6.13a.

<sup>6</sup> Seven U.S. producers \*\*\* used cash bases; five U.S. producers \*\*\* used tax accrual bases; and one U.S. producer (\*\*\*) reported its accounting basis as “other.” Three U.S. producers’ (\*\*\*) fiscal years do not end on December 31<sup>st</sup>; two (\*\*\*) provided financial data based on fiscal years ending November 30<sup>th</sup> and June 30<sup>th</sup>, respectively. As a result of \*\*\* financial data reported based on fiscal years that do not end on December 31<sup>st</sup> as well as \*\*\* noted earlier, U.S. producers’ (including Driscoll’s FL and Driscoll’s CA) shipment data in part 3 do not reconcile with net sales data.

(\*\*\*) started commercial winter strawberry production in 2023 and 2024. Ten regional producers (including Driscoll’s FL) accounted for over 90 percent of net sales quantity and value while 11 U.S. producers (including Driscoll’s FL and Driscoll’s CA) accounted for over 80 percent of winter strawberries sold by all U.S. producers in 2024.<sup>7 8</sup>

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<sup>7</sup> Driscoll’s is \*\*\*, both fresh winter and non-winter in the United States (and also when examining both the within region and national markets for winter strawberries). \*\*\*. Email from \*\*\*, February 14, 2026.

Driscoll’s submitted two U.S. producer questionnaires \*\*\* operations. The first (“Driscoll’s FL”) reports financial results from within region location in Tampa, Florida \*\*\*. Driscoll’s FL’s U.S. producer questionnaire, section 2.3. Driscoll’s within region tolee operations accounted for \*\*\* percent of winter strawberries sales volume in 2024 (see figure 6.1). The second U.S. producer questionnaire submitted by Driscoll’s (“Driscoll’s CA”) reports financial results from out-of-region location in Watsonville, California \*\*\*. Driscoll’s CA’s U.S. producer questionnaire, section 2.3.

There is some disagreement among the industry participants regarding whether U.S. producers’ arrangements with Driscoll’s represent toll production. The \*\*\*. U.S. producer questionnaires, 2.3. Additionally, the petition did not indicate any tolling arrangements in the fresh winter strawberries industry. Petitioner counsel explained that \*\*\*. Emails from \*\*\*, February 9 and February 13, 2026.

Whether or not these arrangements meet the definition of tolling, the impact on the financial results is similar. Namely, the inclusion of \*\*\*.

<sup>8</sup> In addition, within region producer \*\*\* may also use within region producer \*\*\* as a toller (email from \*\*\*, February 10, 2026); although both \*\*\* checked “No” to the tolling question (\*\*\*). \*\*\* U.S. producer questionnaires, 2.3 and emails from \*\*\*, February 9 and February 13, 2026.

Figures 6.1 and 6.2 present the share of net sales quantity in 2024 of winter strawberries sold by regional producers' (including Driscoll's FL) and by all U.S. producers' (including Driscoll's FL and Driscoll's CA), respectively.<sup>9 10</sup> Financial data of winter strawberries largely reflect the operations of the top 10 producers/tollee for the regional analysis (figure 6.1) and the top 11 for national analysis (figure 6.2). Company- specific AUVs fluctuated broadly due to multiple factors, including the size and nature of individual firms' winter strawberry operation. Driscoll's FL and Driscoll's CA tollee operations accounted for the \*\*\* net sales from 2022 to interim 2025.

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<sup>9</sup> Internal consumption and transfers to related firms do not occur in the strawberry industry and data were not collected breaking out these types of sales.

<sup>10</sup> \*\*\* additional strawberry growers \*\*\* located within region may grow winter and non-winter strawberries indoors, 12 months of the year; neither company submitted a U.S. producer questionnaire response in this proceeding. \*\*\* and was noted in \*\*\*. \*\*\*. Driscoll's also noted that another company, \*\*\* may also grow fresh strawberries indoors 12 months of the year (\*\*\*). Email from \*\*\*, February 10, 2026. Mastronardi (headquartered in Ontario Canada) states that it is "the first to bring commercial greenhouse growing to North America." Mastronardi's webpage, <https://www.sunsetgrown.com>, retrieved February 17, 2026. A recent press release states that Mastronardi is adding two high-tech greenhouses located in Minnesota and Iowa, in addition to distribution centers and greenhouses located in 15 states that grow tomatoes and strawberries. Mastronardi to launch Sunset organic greenhouses, <https://www.bluebookservices.com/mastronardi-produce-adds-48-acres-of-greenhouses-in-u-s/>, retrieved February 17, 2026.

**Figure 6.1 Fresh winter strawberries: Within region producers' (including Driscoll's FL) share of net sales quantity in 2024, by firm**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires.

Note: The inclusion of Driscoll FL's regional U.S. producer questionnaires results in some double counting of sales data for fresh winter strawberries from \*\*\* producers/growers (\*\*\*) that submitted their own financial results.

**Figure 6.2 Fresh winter strawberries: National U.S. producers' (including Driscoll's FL and Driscoll's CA) share of net sales quantity in 2024, by firm**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires.

Note: The inclusion of Driscoll's FL and Driscoll's CA U.S. producer questionnaires results in some double counting of sales data for fresh winter strawberries from \*\*\* submitted their own financial results.

## Operations on fresh winter strawberries<sup>11 12</sup>

Table 6.1 presents aggregated data on the within region producers' (including Driscoll's FL) operations in relation to fresh winter strawberries and table 6.2 presents the regional market's corresponding changes in AUVs. Table 6.3 presents fresh winter strawberries' result of operations of aggregated national U.S. producers' (including Driscoll's FL and Driscoll's CA) while table 6.4 presents the national market's corresponding changes in AUVs. Appendix G presents selected company-specific financial data of the ten largest within region producers' (including Driscoll's FL) (table G.1) and aggregated national U.S. producers' (including Driscoll's FL and Driscoll's CA) (table G.2) based on 2024 proceeds from sales of fresh winter strawberries.

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<sup>11</sup> Appendix E presents financial results of year round strawberries of within region and aggregated national operations for expanded like product analysis.

<sup>12</sup> Appendix C presents summaries of financial results excluding \*\*\* for winter strawberries (within region producers in table C.5 and combined U.S. producers in table C.6) and for year round strawberries (within region producers in table C.7 and combined U.S. producers in table C.8) for related party considerations in the within region and national industries of fresh winter as well as year round strawberries.

**Table 6.1 Fresh winter strawberries: Within region U.S. producers' results of operations, by item and period**

Quantity in 1,000 pounds; value in 1,000 dollars; ratio in percent; Interim period is January through September

Item	Measure	2022	2023	2024	Interim 2024	Interim 2025
Proceeds from delivery/sales	Quantity	***	***	***	***	***
Proceeds from delivery/sales	Value	***	***	***	***	***
COGS: Growing costs: Labor hired	Value	***	***	***	***	***
COGS: Growing costs: All other	Value	***	***	***	***	***
COGS: All growing costs	Value	***	***	***	***	***
COGS: Packing costs	Value	***	***	***	***	***
COGS: Total	Value	***	***	***	***	***
Gross profit or (loss)	Value	***	***	***	***	***
SG&A expenses	Value	***	***	***	***	***
Operating income or (loss)	Value	***	***	***	***	***
Other expense / (income), net	Value	***	***	***	***	***
Net income or (loss)	Value	***	***	***	***	***
Depreciation/amortization	Value	***	***	***	***	***
Cash flow	Value	***	***	***	***	***
COGS: Growing costs: Labor hired	Ratio to NS	***	***	***	***	***
COGS: Growing costs: All other	Ratio to NS	***	***	***	***	***
COGS: All growing costs	Ratio to NS	***	***	***	***	***
COGS: Packing costs	Ratio to NS	***	***	***	***	***
COGS: Total	Ratio to NS	***	***	***	***	***
Gross profit	Ratio to NS	***	***	***	***	***
SG&A expense	Ratio to NS	***	***	***	***	***
Operating income or (loss)	Ratio to NS	***	***	***	***	***
Net income or (loss)	Ratio to NS	***	***	***	***	***

Table continued.

**Table 6.1 (Continued) Fresh winter strawberries: Within region U.S. producers' results of operations, by item and period**

Shares in percent; unit values in dollars per pound; count in number of firms reporting; interim is January through September

Item	Measure	2022	2023	2024	Interim 2024	Interim 2025
COGS: Growing costs: Labor hired	Share	***	***	***	***	***
COGS: Growing costs: All other	Share	***	***	***	***	***
COGS: All growing costs	Share	***	***	***	***	***
COGS: Packing costs	Share	***	***	***	***	***
COGS: Total	Share	100.0	100.0	100.0	100.0	100.0
Proceeds from delivery/sales	Unit value	***	***	***	***	***
COGS: Growing costs: Labor hired	Unit value	***	***	***	***	***
COGS: Growing costs: All other	Unit value	***	***	***	***	***
COGS: All growing costs	Unit value	***	***	***	***	***
COGS: Packing costs	Unit value	***	***	***	***	***
COGS: Total	Unit value	***	***	***	***	***
Gross profit or (loss)	Unit value	***	***	***	***	***
SG&A expenses	Unit value	***	***	***	***	***
Operating income or (loss)	Unit value	***	***	***	***	***
Net income or (loss)	Unit value	***	***	***	***	***
Operating losses	Count	4	9	11	6	9
Net losses	Count	4	10	13	6	8
Data	Count	17	18	18	19	19

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares represent the share of COGS. Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

**Table 6.2 Fresh winter strawberries: Changes in AUVs between comparison periods of within region producers**

Changes in percent; interim is January through September

Item	2022–24	2022–23	2023–24	Interim 2024–25
Proceeds from delivery/sales	▲ ***	▲ ***	▼ ***	▲ ***
COGS: Growing costs: Labor hired	▲ ***	▲ ***	▲ ***	▼ ***
COGS: Growing costs: All other	▲ ***	▲ ***	▲ ***	▲ ***
COGS: All growing costs	▲ ***	▲ ***	▲ ***	▲ ***
COGS: Packing costs	▲ ***	▲ ***	▼ ***	▲ ***
COGS: Total	▲ ***	▲ ***	▲ ***	▲ ***

Table continued.

**Table 6.2 (Continued) Fresh winter strawberries: Changes in AUVs between comparison periods of within region producers**

Changes in dollars per pound; interim is January through September

Item	2022–24	2022–23	2023–24	Interim 2024–25
Proceeds from delivery/sales	▲ ***	▲ ***	▼ ***	▲ ***
COGS: Growing costs: Labor hired	▲ ***	▲ ***	▲ ***	▼ ***
COGS: Growing costs: All other	▲ ***	▲ ***	▲ ***	▲ ***
COGS: All growing costs	▲ ***	▲ ***	▲ ***	▲ ***
COGS: Packing costs	▲ ***	▲ ***	▼ ***	▲ ***
COGS: Total	▲ ***	▲ ***	▲ ***	▲ ***
Gross profit or (loss)	▼ ***	▼ ***	▼ ***	▼ ***
SG&A expense	▲ ***	▲ ***	▲ ***	▼ ***
Operating income or (loss)	▼ ***	▼ ***	▼ ***	▼ ***
Net income or (loss)	▼ ***	▼ ***	▼ ***	▼ ***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Percentages and unit values shown as “0.0” or “0.00” represent values greater than zero, but less than “0.05” or “0.005,” respectively. Zeroes, null values, and undefined calculations are suppressed and shown as “—”. Period changes preceded by a “▲” represent an increase, while period changes preceded by a “▼” represent a decrease.

**Table 6.3 Fresh winter strawberries: National U.S. producers' results of operations, by item and period**

Quantity in 1,000 pounds; value in 1,000 dollars; ratios in percent; interim is January through September

Item	Measure	2022	2023	2024	Interim 2024	Interim 2025
Proceeds from delivery/sales	Quantity	***	***	***	***	***
Proceeds from delivery/sales	Value	***	***	***	***	***
COGS: Growing costs: Labor hired	Value	***	***	***	***	***
COGS: Growing costs: All other	Value	***	***	***	***	***
COGS: All growing costs	Value	***	***	***	***	***
COGS: Packing costs	Value	***	***	***	***	***
COGS: Total	Value	***	***	***	***	***
Gross profit or (loss)	Value	***	***	***	***	***
SG&A expenses	Value	***	***	***	***	***
Operating income or (loss)	Value	***	***	***	***	***
Other expense / (income), net	Value	***	***	***	***	***
Net income or (loss)	Value	***	***	***	***	***
Depreciation/amortization	Value	***	***	***	***	***
Cash flow	Value	***	***	***	***	***
COGS: Growing costs: Labor hired	Ratio to NS	***	***	***	***	***
COGS: Growing costs: All other	Ratio to NS	***	***	***	***	***
COGS: All growing costs	Ratio to NS	***	***	***	***	***
COGS: Packing costs	Ratio to NS	***	***	***	***	***
COGS: Total	Ratio to NS	***	***	***	***	***
Gross profit	Ratio to NS	***	***	***	***	***
SG&A expense	Ratio to NS	***	***	***	***	***
Operating income or (loss)	Ratio to NS	***	***	***	***	***
Net income or (loss)	Ratio to NS	***	***	***	***	***

Table continued.

**Table 6.3 (Continued) Fresh winter strawberries: National U.S. producers' results of operations, by item and period**

Shares in percent; unit values in dollars per pound; count in number of firms reporting; interim is January through September

Item	Measure	2022	2023	2024	Interim 2024	Interim 2025
COGS: Growing costs: Labor hired	Share	***	***	***	***	***
COGS: Growing costs: All other	Share	***	***	***	***	***
COGS: All growing costs	Share	***	***	***	***	***
COGS: Packing costs	Share	***	***	***	***	***
COGS: Total	Share	100.0	100.0	100.0	100.0	100.0
Proceeds from delivery/sales	Unit value	***	***	***	***	***
COGS: Growing costs: Labor hired	Unit value	***	***	***	***	***
COGS: Growing costs: All other	Unit value	***	***	***	***	***
COGS: All growing costs	Unit value	***	***	***	***	***
COGS: Packing costs	Unit value	***	***	***	***	***
COGS: Total	Unit value	***	***	***	***	***
Gross profit or (loss)	Unit value	***	***	***	***	***
SG&A expenses	Unit value	***	***	***	***	***
Operating income or (loss)	Unit value	***	***	***	***	***
Net income or (loss)	Unit value	***	***	***	***	***
Operating losses	Count	6	12	11	11	15
Net losses	Count	7	13	13	11	15
Data	Count	30	33	34	35	35

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares represent the share of COGS. Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

**Table 6.4 Fresh winter strawberries: Changes in AUVs between comparison periods of national U.S. producers**

Changes in percent; interim is January through September

Item	2022–24	2022–23	2023–24	Interim 2024–25
Proceeds from delivery/sales	▼***	▼***	▼***	▲***
COGS: Growing costs: Labor hired	▼***	▲***	▼***	▼***
COGS: Growing costs: All other	▲***	▲***	▲***	▲***
COGS: All growing costs	▲***	▲***	▼***	▲***
COGS: Packing costs	▼***	▲***	▼***	▲***
COGS: Total	▲***	▲***	▼***	▲***

Table continued.

**Table 6.4 (Continued) Fresh winter strawberries: Changes in AUVs between comparison periods national U.S. producers**

Changes in dollars per pound; interim is January through September

Item	2022–24	2022–23	2023–24	Interim 2024–25
Proceeds from delivery/sales	▼***	▼***	▼***	▲***
COGS: Growing costs: Labor hired	▼***	▲***	▼***	▼***
COGS: Growing costs: All other	▲***	▲***	▲***	▲***
COGS: All growing costs	▲***	▲***	▼***	▲***
COGS: Packing costs	▼***	▲***	▼***	▲***
COGS: Total	▲***	▲***	▼***	▲***
Gross profit or (loss)	▼***	▼***	▼***	▼***
SG&A expense	▲***	▲***	▲***	▼***
Operating income or (loss)	▼***	▼***	▼***	▼***
Net income or (loss)	▼***	▼***	▼***	▼***

Source: Compiled from data submitted in response to Commission questionnaires.

## Net sales (also referred to as “proceeds from deliveries/sales”)<sup>13</sup>

Table 6.1 shows that regional producers’ (including Driscoll’s FL) proceeds from deliveries/sales of winter strawberries declined each year by quantity and increased irregularly by value while per unit of fresh winter strawberries sold irregularly increased from 2022 to 2024; net sales quantity and value were higher in interim 2025 than in interim 2024, while per unit sold stayed the same when rounded to the nearest cent.<sup>14</sup> Table 6.3 shows that national U.S. producers’ (including Driscoll’s FL and Driscoll’s CA) proceeds from deliveries/sales of winter strawberries increased each year by quantity and value while per unit of fresh winter strawberries sold declined each year from 2022 to 2024; net sales quantity, value, and per unit were all higher in interim 2025 than in interim 2024.<sup>15</sup>

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<sup>13</sup> Within region winter strawberries sales include the responses of 19 within region producers (\*\*\*) while national winter strawberries sales by all U.S. producers combines the responses of 19 within region producers and \*\*\* 16 out-of-region producers (\*\*\*) .

Net sales may be overstated because aggregated net sales data include \*\*\* sales from four tollers (\*\*\*) as well as the net sales reported by approximately \*\*\* across the United States. Email from \*\*, February 10, 2026.

As noted earlier in this section, record information is unclear on whether \*\*. \*\*. Email from \*\*, February 13, 2026.

<sup>14</sup> Table G.1 shows that within region producers’ (including Driscoll’s FL) average per-pound net sales values varied. Differences presumably reflect factors such as size of operation, the wide range of packaging types, and to a lesser degree organic strawberries (organic winter strawberries accounted for 3.2 to 13.6 percent of winter strawberries sold by all U.S. producers during the period examined). U.S. producer questionnaires, 3.9c.

<sup>15</sup> Table G.2 shows that aggregated national U.S. producers’ (including Driscoll’s FL and Driscoll’s CA) average per-pound net sales values varied for similar reasons as the within region market noted above.

## Cost of goods sold and gross income or loss<sup>16</sup>

Tables 6.1 and 6.3 show that growing costs (including seedlings, fertilizers, and mulch and classified as other growing inputs in tables 6.5 and 6.6) accounted for the vast majority of regional and national producers' total COGS.<sup>17 18</sup> Tables 6.5 and 6.6 present raw material growing costs broken out by input for the regional and national markets, respectively.

**Table 6.5 Fresh winter strawberries: Within region U.S. producers' non-labor growing costs, by major material inputs, 2024**

Values in 1,000 dollars; Unit values in dollars per pound; Share of value in percent

Item	Value	Unit value	Share of value
Soil	***	***	***
Water	***	***	***
Chemicals	***	***	***
Other growing inputs	***	***	***
All non-labor growing inputs	***	***	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

**Table 6.6 Fresh winter strawberries: National U.S. producers' non-labor growing costs, by major material inputs, 2024**

Values in 1,000 dollars; Unit values in dollars per pound; Share of value in percent

Item	Value	Unit value	Share of value
Soil	***	***	***
Water	***	***	***
Chemicals	***	***	***
Other growing inputs	***	***	***
All non-labor growing inputs	***	***	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

<sup>16</sup> COGS items are presented for U.S. producers and the two tollee responses by Driscoll's. Specific COGS breakouts are not as meaningful given the differing types of operations. Driscoll's was \*\*\*. As a result, certain tollee costs may be understated for both within region and national markets. Driscoll's FL and Driscoll's CA's U.S. producer questionnaires, 3.12b, 3.13b, and 3.13c.

<sup>17</sup> \*\*\*.

<sup>18</sup> Driscoll's tollers (\*\*\*. Email from \*\*\*, February 10, 2026. As noted earlier, Driscoll's \*\*\* in its two U.S. producer questionnaire responses.

The per unit cost for packing winter strawberries increased irregularly for regional producers (including Driscoll's FL) (table 6.1) and decreased irregularly for combined national producers (including Driscoll's FL and Driscoll's CA) (table 6.3) from 2022 to 2024; per unit packing costs were higher for both in interim 2025 than in interim 2024 (tables 6.1 and 6.3).<sup>19</sup>

Table 6.1 shows that the regional producers' (including Driscoll's FL) total COGS value irregularly increased while total COGS as a ratio to net sales value and COGS per unit increased each year (reflecting growing costs increasing even as net sales quantity declined from 2022 to 2024). The national producers' (including Driscoll's FL and Driscoll's CA) total COGS value and total COGS as a ratio to net sales increased each year while COGS per unit irregularly increased from 2022 to 2024 (table 6.3). Total COGS value, as a share of net sales, and COGS per unit were all higher in interim 2025 than in interim 2024 in both regional and national winter strawberry markets (tables 6.1 and 6.3).

Indicators of gross profit (gross profit value, as a ratio to net sales, and per unit) for winter strawberries in the regional market consistently declined from 2022 to 2024 and continued to be lower in interim 2025 than in interim 2024 (table 6.1). The gross profit of winter strawberries in the national market irregularly declined while gross profit as a ratio to net sales and gross profit per unit declined each year from 2022 to 2024 and all three were lower in interim 2025 than in interim 2024 (table 6.3).

## **SG&A expenses and operating income or loss**

SG&A expenses, SG&A expense ratio (i.e., total SG&A expenses divided by net sales), and per unit SG&A expenses all consistently increased for full year periods 2022 to 2024 in both the regional market (table 6.1) and the national market (table 6.3); all three were lower in interim 2025 than in interim 2024 in the regional market (table 6.1). SG&A expenses were higher, while SG&A expense ratio and per unit SG&A expenses were lower in interim 2025 than in interim 2024 in the national market (table 6.3).

For both regional and national winter strawberry markets, operating income declined each year, with SG&A expenses magnifying the impact of declining gross profit (tables 6.1 and

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<sup>19</sup> Most within region and out-of-region producers did not report packing costs (16 out of 38 U.S. producers of winter strawberries reported packing costs in at least one period). \*\*\*. U.S. producer questionnaires, 3.9a and 3.9b; and emails from \*\*\*, February 13, 2026.

6.3).<sup>20</sup> Regionally, \*\*\* accounted for the largest (albeit declining) share of operating income from 2022 to 2024 but reported an operating loss in interim 2025 (table G.1). Six of the 10 largest regional producers (\*\*\* ) reported at least one period with operating losses (table G.1). Nationally, \*\*\* accounted for the largest share of operating income, with its operating income irregularly increasing from 2022 to 2024, and higher operating income in interim 2025 than in interim 2024 (table G.2).<sup>21</sup> Five of the 11 largest national producers (\*\*\* ) reported at least one period of an operating loss (table G.2).<sup>22</sup>

### **All other expenses and net income or loss<sup>23</sup>**

Classified below the operating income level are mortgage expenses, other expenses, and other income (including government assistance) of winter strawberries producers. In tables 6.1 and 6.3, these items are aggregated, and only the net amount is shown. Net other expenses and income irregularly increased from 2022 to 2024 and were higher in interim 2025 than in interim 2024 for regional producers (but slightly lower when aggregating all U.S. producers).

For regional producers (table 6.1) and national producers (table 6.3) of fresh winter strawberries, net income and operating income shared the same directional pattern of consistent decline from 2022 to 2024, and both were lower in interim 2025 than in interim 2024. As compared to operating income, the lower amount of net income reflects mortgage and other expenses, both varying in terms of their relative importance during the period, which were partially offset by other income.<sup>24</sup>

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<sup>20</sup> For within region producers' (including Driscoll's FL) of winter strawberries, two small within region producers \*\*\* were the only two firms that reported increasing operating profits each year from 2022 to 2024, but both firms reported lower operating profits in interim 2025 than in interim 2024. U.S. producer questionnaires, 3.9a.

<sup>21</sup> For national producers (including Driscoll's FL and Driscoll's CA) of winter strawberries, 15 out of 38 national producers/tolles \*\*\* in operating profits from 2022 to 2024. Smaller out-of-region U.S. producers (\*\*\* reported improvements each year in operating profits from 2022 to 2024, with two out-of-region producers \*\*\* as the only two of these four out-of-region producers reporting higher operating profits in interim 2025 than in interim 2024. U.S. producer questionnaires, 3.9a.

<sup>22</sup> One U.S. producer (\*\*\*), on the lists of top within region and national winter strawberries producers, reported worsening operating losses throughout the period examined (tables G.1 and G.2).

<sup>23</sup> Mortgage and other expenses are based on responses of 20 out of 35 U.S. producers of winter strawberries that reported at least one period of mortgage and other expenses. Other income (including government assistance) are based on 17 out of 35 U.S. producers of winter strawberries.

<sup>24</sup> A variance analysis is not shown due to differing types of operations as well as the large variation of cost structures among the reporting firms.

## Capital expenditures, R&D expenses, assets, and ROA<sup>25</sup>

Tables 6.7 and 6.8 present regional and aggregated national producers of winter strawberries' capital expenditures, R&D expenses, assets, and ROA, respectively.<sup>26</sup> Tables 6.9, 6.10, and 6.11 present the narrative explanation of responding U.S. producers on the nature, focus, and significance of their capital expenditures, R&D expenses, and major asset categories and any significant changes in asset levels over time.

**Table 6.7 Fresh winter strawberries: Within region U.S. producers' capital expenditures, R&D expenses, total assets and operating return on assets, by period**

Value in 1,000 dollars; ratio in percent; interim is January through September

Item	Measure	2022	2023	2024	Interim 2024	Interim 2025
Capital expenditures	Value	***	***	***	***	***
R&D expenses	Value	***	***	***	***	***
Total assets	Value	***	***	***	***	***
ROA	Ratio	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: ROA calculations exclude firms that failed to provide total asset data.

<sup>25</sup> Fifteen out of 18 within region producers of winter strawberries (excluding tolee Driscoll's FL) reported net assets (\*\*\*) failed to report their net assets. Ten out-of-region producers (excluding tolee Driscoll's CA) (\*\*\*) were unable to report their net assets.

\*\*\*

<sup>26</sup> The operating ROA is calculated as operating income divided by total assets. With respect to a firm's overall operations, the total asset value reflects an aggregation of a number of assets which are generally not product specific. Thus, high-level allocations are generally required in order to report a total asset value on a product-specific basis.



**Table 6.10 Fresh winter strawberries: U.S. producers' narrative descriptions of their R&D expenses, by firm**

Firm	Narrative on R&D expenses
***	***
***	***
***	***
***	***
***	***

Source: Compiled from data submitted in response to Commission questionnaires.



## Capital and investment<sup>27</sup>

The Commission requested all U.S. producers of winter strawberries to describe any actual or potential negative effects of imports of fresh winter strawberries from Mexico on their firms' growth, investment, ability to raise capital, development and production efforts, or the scale of capital investments. Table 6.12 presents the count of all U.S. producers reporting negative effects of imports in each category, by location of U.S. producer. Table 6.13 presents the same information limited to within region producers only. Table 6.14 presents the U.S. producers' narrative responses.<sup>28</sup>

**Table 6.12 Fresh winter strawberries: Count of U.S. producers' indicating actual and anticipated negative effects of imports from subject sources on investment, growth, and development since January 1, 2022, by effect type and U.S. producer type**

Count in number of U.S. firms reporting

Effect	Firm location	No	Yes	No response
Negative effects on investment	U.S. producers: Located within region	6	11	3
Negative effects on investment	U.S. producers: Located out-of-region	19	0	0
Negative effects on investment	U.S. producers: Located throughout U.S.	25	11	3
Negative effects on growth and development	U.S. producers: Located within region	9	9	2
Negative effects on growth and development	U.S. producers: Located out-of-region	19	0	0
Negative effects on growth and development	U.S. producers: Located throughout U.S.	28	9	2
Anticipated negative effects of imports	U.S. producers: Located within region	8	10	2
Anticipated negative effects of imports	U.S. producers: Located out-of-region	19	0	0
Anticipated negative effects of imports	U.S. producers: Located throughout U.S.	27	10	2

Source: Compiled from data submitted in response to Commission questionnaires.

<sup>27</sup> This section includes all 39 responding U.S. producers (\*\*\*) , with Driscoll's counting as two producers.

<sup>28</sup> Of the 39 U.S. producer questionnaire responses received, \*\*\* producers indicated negative and/or anticipated negative capital and investment from imports of winter strawberries from Mexico.

**Table 6.13 Fresh winter strawberries: Count of within region U.S. producers' indicating actual and anticipated negative effects of imports from subject sources on investment, growth, and development since January 1, 2022, by effect**

Number of regional firms reporting

<b>Effect</b>	<b>Category</b>	<b>Count</b>
Cancellation, postponement, or rejection of expansion projects	Investment	6
Denial or rejection of investment proposal	Investment	1
Reduction in the size of capital investments	Investment	3
Return on specific investments negatively impacted	Investment	3
Other investment effects	Investment	3
Any negative effects on investment	Investment	11
Rejection of bank loans	Growth	1
Lowering of credit rating	Growth	1
Problem related to the issue of stocks or bonds	Growth	0
Ability to service debt	Growth	4
Other growth and development effects	Growth	4
Any negative effects on growth and development	Growth	9
Anticipated negative effects of imports	Future	10

Source: Compiled from data submitted in response to Commission questionnaires.

**Table 6.14 Fresh winter strawberries: U.S. producers' narratives relating to actual and anticipated negative effects of imports on investment, growth, and development, since January 1, 2022, by firm and effect**

Item	Firm name and narrative on impact of imports
Cancellation, postponement, or rejection of expansion projects	***
Cancellation, postponement, or rejection of expansion projects	***
Cancellation, postponement, or rejection of expansion projects	***
Cancellation, postponement, or rejection of expansion projects	***
Reduction in the size of capital investments	***
Return on specific investments negatively impacted	***
Return on specific investments negatively impacted	***
Other negative effects on investments	***
Other negative effects on investments	***
Other negative effects on investments	***
Lowering of credit rating	***
Ability to service debt	***
Ability to service debt	***
Ability to service debt	***
Other effects on growth and development	***
Other effects on growth and development	***
Other effects on growth and development	***

Table continued.

**Table 6.14 (Continued) Fresh winter strawberries: U.S. producers' narratives relating to actual and anticipated negative effects of imports on investment, growth, and development, since January 1, 2022, by firm and effect**

Item	Firm name and narrative on impact of imports
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Only within region U.S. producers reported negative effects.

## Part 7: Threat considerations and information on nonsubject countries

Section 771(7)(F)(i) of the Act (19 U.S.C. § 1677(7)(F)(i)) provides that—

In determining whether an industry in the United States is threatened with material injury by reason of imports (or sales for importation) of the subject merchandise, the Commission shall consider, among other relevant economic factors<sup>1--</sup>

- (I) if a countervailable subsidy is involved, such information as may be presented to it by the administering authority as to the nature of the subsidy (particularly as to whether the countervailable subsidy is a subsidy described in Article 3 or 6.1 of the Subsidies Agreement), and whether imports of the subject merchandise are likely to increase,
- (II) any existing unused production capacity or imminent, substantial increase in production capacity in the exporting country indicating the likelihood of substantially increased imports of the subject merchandise into the United States, taking into account the availability of other export markets to absorb any additional exports,
- (III) a significant rate of increase of the volume or market penetration of imports of the subject merchandise indicating the likelihood of substantially increased imports,
- (IV) whether imports of the subject merchandise are entering at prices that are likely to have a significant depressing or suppressing effect on domestic prices, and are likely to increase demand for further imports,
- (V) inventories of the subject merchandise,

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<sup>1</sup> Section 771(7)(F)(ii) of the Act (19 U.S.C. § 1677(7)(F)(ii)) provides that “The Commission shall consider {these factors} . . . as a whole in making a determination of whether further dumped or subsidized imports are imminent and whether material injury by reason of imports would occur unless an order is issued or a suspension agreement is accepted under this title. The presence or absence of any factor which the Commission is required to consider . . . shall not necessarily give decisive guidance with respect to the determination. Such a determination may not be made on the basis of mere conjecture or supposition.”

- (VI) the potential for product-shifting if production facilities in the foreign country, which can be used to produce the subject merchandise, are currently being used to produce other products,
- (VII) in any investigation under this title which involves imports of both a raw agricultural product (within the meaning of paragraph (4)(E)(iv)) and any product processed from such raw agricultural product, the likelihood that there will be increased imports, by reason of product shifting, if there is an affirmative determination by the Commission under section 705(b)(1) or 735(b)(1) with respect to either the raw agricultural product or the processed agricultural product (but not both),
- (VIII) the actual and potential negative effects on the existing development and production efforts of the domestic industry, including efforts to develop a derivative or more advanced version of the domestic like product, and
- (IX) any other demonstrable adverse trends that indicate the probability that there is likely to be material injury by reason of imports (or sale for importation) of the subject merchandise (whether or not it is actually being imported at the time).<sup>2</sup>

Information on the volume and pricing of imports of the subject merchandise is presented in Parts 4 and 5; and information on the effects of imports of the subject merchandise on U.S. producers' existing development and production efforts is presented in Part 6. Information on inventories of the subject merchandise; foreign producers' operations, including the potential for "product-shifting;" any other threat indicators, if applicable; and any dumping in third-country markets, follows. Also presented in this section of the report is information obtained for consideration by the Commission on nonsubject countries.

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<sup>2</sup> Section 771(7)(F)(iii) of the Act (19 U.S.C. § 1677(7)(F)(iii)) further provides that, in antidumping investigations, ". . . the Commission shall consider whether dumping in the markets of foreign countries (as evidenced by dumping findings or antidumping remedies in other WTO member markets against the same class or kind of merchandise manufactured or exported by the same party as under investigation) suggests a threat of material injury to the domestic industry."

## The industry in Mexico

The Commission issued foreign producers' or exporters' questionnaires to 77 firms believed to produce and/or export fresh winter strawberries from Mexico.<sup>3</sup> <sup>4</sup> Usable responses to the Commission's questionnaire were received from 49 firms.<sup>5</sup>

Table 7.1 presents the number of producers/exporters in Mexico that responded to the Commission's questionnaire, their exports to the United States as a share of U.S. imports by Mexico in 2024, and their estimated share of total production of fresh winter strawberries in Mexico during 2024.

**Table 7.1 Fresh winter strawberries: Number of responding producers/exporters, approximate share of production, and exports to the United States as a share of U.S. imports from Mexico, 2024**

<b>Subject foreign industry</b>	<b>Number of responding firms</b>	<b>Approximate share of production (percent)</b>	<b>Exports by producers as a share of U.S. imports from subject country (percent)</b>	<b>Exports by producers and resellers as a share of U.S. imports from subject country (percent)</b>
Mexico	49	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Approximate share of production is responding foreign producers' reported production in questionnaires divided by the production in Mexico reported by Servicio de Información Agroalimentaria y Pesquera ("SIAP"). See tables 7.9 and 7.10 for more detail. Exports shares are to imports as reported in Table 4.2. There is some double counting when adding exports by resellers for the final column of data since in part they are supplied by the responding farmers/producers, and, in some cases, both have the shipments listed as exports to the United States.

<sup>3</sup> These firms were identified through a review of information submitted in the petition and presented in third-party sources.

<sup>4</sup> Seven firms submitted questionnaires indicating they did not produce or export fresh winter strawberries from Mexico since January 1, 2022.

<sup>5</sup> \*\*\*. Five firms reported they were only resellers of fresh winter strawberries.

Table 7.2 presents information on the fresh winter strawberries operations of the responding producers in Mexico by firm.

**Table 7.2 Fresh winter strawberries: Summary data for foreign producers in Mexico, by firm in 2024**

<b>Producer name</b>	<b>Production (1,000 pounds)</b>	<b>Share of reported production (percent)</b>	<b>Exports to the United States (1,000 pounds)</b>	<b>Share of reported exports to the United States (percent)</b>	<b>Total shipments (1,000 pounds)</b>	<b>Share of firm's total shipments exported to the United States (percent)</b>
Agrana	***	***	***	***	***	***
Baja Vid	***	***	***	***	***	***
Berry Hills	***	***	***	***	***	***
BerryMex	***	***	***	***	***	***
Cesar Armando	***	***	***	***	***	***
Costa	***	***	***	***	***	***
DCO	***	***	***	***	***	***
Don Juanito	***	***	***	***	***	***
Don Librado	***	***	***	***	***	***
Don Ramon de Baja	***	***	***	***	***	***
Don Sabino	***	***	***	***	***	***
Dos Mares	***	***	***	***	***	***
Edgar Gamaliel	***	***	***	***	***	***
El Cerezo	***	***	***	***	***	***
El Milagro	***	***	***	***	***	***
F&F	***	***	***	***	***	***
Felipe Ruiz	***	***	***	***	***	***
Fragaria	***	***	***	***	***	***
Fresh Baja	***	***	***	***	***	***
Gavaro	***	***	***	***	***	***
Gerardo Gracia Menaut	***	***	***	***	***	***
Giant Berry	***	***	***	***	***	***
Heirloom	***	***	***	***	***	***
Hermanos Magana	***	***	***	***	***	***
Hermanos Vega	***	***	***	***	***	***

Table continued.

**Table 7.2 (Continued) Fresh winter strawberries: Summary data for foreign producers in Mexico, by firm in 2024**

<b>Producer name</b>	<b>Production (1,000 pounds)</b>	<b>Share of reported production (percent)</b>	<b>Exports to the United States (1,000 pounds)</b>	<b>Share of reported exports to the United States (percent)</b>	<b>Total shipments (1,000 pounds)</b>	<b>Share of firm's total shipments exported to the United States (percent)</b>
Las Hortalizas	***	***	***	***	***	***
Los Cerritos	***	***	***	***	***	***
Los Sarabias	***	***	***	***	***	***
Mainland	***	***	***	***	***	***
Masusta	***	***	***	***	***	***
Meridian	***	***	***	***	***	***
Naturberry	***	***	***	***	***	***
Nuevo Produce	***	***	***	***	***	***
Optimal Berry	***	***	***	***	***	***
Optimal Growing	***	***	***	***	***	***
Pacific Best Berry	***	***	***	***	***	***
Proceza	***	***	***	***	***	***
Punta Colonet	***	***	***	***	***	***
San Carlos	***	***	***	***	***	***
San Vicente	***	***	***	***	***	***
Santa Monica	***	***	***	***	***	***
Sergio Martinez	***	***	***	***	***	***
Sky Ranch	***	***	***	***	***	***
Ursomex	***	***	***	***	***	***
Vema	***	***	***	***	***	***
Vijose	***	***	***	***	***	***
All individual producers	***	100.0	***	100.0	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Table 7.3 presents information on exports of fresh winter strawberries of responding resellers in Mexico by firm.

**Table 7.3 Fresh winter strawberries: Summary data for resellers in Mexico in 2024, by firm**

Reseller name	Resales exported to the United States (1,000 pounds)	Share of resales exported to the United States (percent)
Agrana	***	***
Driscoll's	***	***
Olmos	***	***
San Vicente	***	***
Sun Belle	***	***
All individual resellers	***	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Table 7.4 presents events in the industry in Mexico since January 1, 2022.

**Table 7.4 Fresh winter strawberries: Important industry events in Mexico since 2022**

Item	Event
Expansion	In January 2023, U.S.-based berry firm Berry People announced its opening of a second corporate office in Guadalajara, Mexico to expand ties with its shipping operations and farmers in Central Mexico and Baja California.
Trade development	In 2023, Central California's peak strawberry harvest season was delayed from May to June due to adverse weather conditions (i.e., heavy rains), providing an opportunity for the Mexican strawberry industry to meet U.S. demand.
Expansion	In January 2024, U.S.-based berry firm Driscoll's opened its \$7.1 million expansion of its strawberry nursery in Jalisco, Mexico.
Weather conditions	From 2022 through 2024, large portions of northern, central, and southern Mexico were affected by drought conditions due to a lack of rain; nearly 76 percent of the country was experiencing drought conditions as of July 2024, marking it as the most widespread drought in Mexico since 2011.
Trade development	In June 2025, the National Association of Berry Exporters (Aneberries) in Mexico announced that it projected an increase of 25 percent in Mexico's strawberry shipments to the United States despite tariffs and other trade barriers imposed by the United States in 2025.

Sources: HortiDaily, "Driscoll's invests \$7.1 million into Mexican berry nursery expansion," <https://www.hortidaily.com/article/9592986/driscoll-s-invests-7-1-million-into-mexican-berry-nursery-expansion/>, retrieved February 13, 2026; The Packer, "Berry People expands Mexico footprint, opening second office in Guadalajara," <https://www.thepacker.com/news/industry/berry-people-expands-mexico-footprint-opening-second-office-guadalajara>, retrieved February 13, 2026; FreshPlaza, "Mexico expects record strawberry sales to the U.S. despite tariffs and health challenges," <https://www.freshplaza.com/north-america/article/9744678/mexico-expects-record-strawberry-sales-to-the-u-s-despite-tariffs-and-health-challenges/>, retrieved February 13, 2026; ProducePay, "Mexico benefits from California's delayed strawberry season," <https://producepay.com/resources/mexico-benefits-from-californias-delayed-strawberry-season/>, retrieved February 13, 2026; Thiem, "Multi-year drought and heat waves across Mexico in 2024," <https://www.climate.gov/news-features/event-tracker/multi-year-drought-and-heat-waves-across-mexico-2024>, retrieved February 13, 2026.

## Changes in operations

Producers in Mexico were asked to report any change in the character of their operations or organization relating to the production of fresh winter strawberries since January 1, 2022, as well as any anticipated changes. Twenty of 49 producers and resellers indicated in their questionnaires that they had experienced such changes. Table 7.5 presents the count of the changes in operations and table 7.6 presents these changes identified by these producers and resellers.

**Table 7.5 Fresh winter strawberries: Count of reported changes in operations since January 1, 2022, by subject foreign industry and type of change in operation**

Item	Mexico
Plant openings	4
Plant closings	2
Prolonged shutdowns	1
Production curtailments	6
Relocations	0
Expansions	6
Acquisitions	0
Consolidations	0
Weather-related or force majeure events	3
Other	4
Any change during the period	20
Anticipated changes in future	3

Source: Compiled from data submitted in response to Commission questionnaires.

**Table 7.6 Fresh winter strawberries: Reported changes in operations in Mexico since January 1, 2022, by reported change category and firm**

Type of change	Firm name and accompanying narrative response regarding changes in operations
Plant openings	***
Plant openings	***
Plant openings	***
Plant closings	***
Plant closings	***
Prolonged shutdowns	***
Production curtailments	***
Production curtailments	***
Production curtailments	***
Production curtailments	***
Production curtailments	***
Expansions	***
Expansions	***
Expansions	***
Expansions	***
Expansions	***
Expansions	***
Weather-related or force majeure events	***

<b>Type of change</b>	<b>Firm name and accompanying narrative response regarding changes in operations</b>
Weather-related or force majeure events	***
Other	***

Type of change	Firm name and accompanying narrative response regarding changes in operations
Other	***
Other	***
Other	***
Anticipated changes	***
Anticipated changes	***
Anticipated changes	***

Source: Compiled from data submitted in response to Commission questionnaires.

## Operations on Fresh winter strawberries

### Production

Table 7.7 and figure 7.1 presents responding foreign producers' monthly production of all strawberries in Mexico by winter and non-winter (all other) strawberries and by market. Production of strawberries appears to be cyclical, typically increasing from October to March, peaking in March before declining sharply after April and continuing to decrease until October.

**Table 7.7 All strawberries: Foreign producers' monthly production in Mexico, by product type, market, and month**

Quantity in 1,000 pounds

Year	Month	Product type	Own processing or freezing	Fresh market / first level of sale	All reported production in Mexico
2022	January	Winter	***	***	***
2022	February	Winter	***	***	***
2022	March	Winter	***	***	***
2022	April	Non-winter	***	***	***
2022	May	Non-winter	***	***	***
2022	June	Non-winter	***	***	***
2022	July	Non-winter	***	***	***
2022	August	Non-winter	***	***	***
2022	September	Non-winter	***	***	***
2022	October	Winter	***	***	***
2022	November	Winter	***	***	***
2022	December	Winter	***	***	***
2023	January	Winter	***	***	***
2023	February	Winter	***	***	***
2023	March	Winter	***	***	***
2023	April	Non-winter	***	***	***
2023	May	Non-winter	***	***	***
2023	June	Non-winter	***	***	***
2023	July	Non-winter	***	***	***
2023	August	Non-winter	***	***	***
2023	September	Non-winter	***	***	***
2023	October	Winter	***	***	***
2023	November	Winter	***	***	***
2023	December	Winter	***	***	***

Table continued.

**Table 7.7 (Continued) All strawberries: Foreign producers' monthly production in Mexico, by product type, market, and month**

Quantity in 1,000 pounds

Year	Month	Product type	Own processing or freezing	Fresh market / first level of sale	All reported production in Mexico
2024	January	Winter	***	***	***
2024	February	Winter	***	***	***
2024	March	Winter	***	***	***
2024	April	Non-winter	***	***	***
2024	May	Non-winter	***	***	***
2024	June	Non-winter	***	***	***
2024	July	Non-winter	***	***	***
2024	August	Non-winter	***	***	***
2024	September	Non-winter	***	***	***
2024	October	Winter	***	***	***
2024	November	Winter	***	***	***
2024	December	Winter	***	***	***
2025	January	Winter	***	***	***
2025	February	Winter	***	***	***
2025	March	Winter	***	***	***
2025	April	Non-winter	***	***	***
2025	May	Non-winter	***	***	***
2025	June	Non-winter	***	***	***
2025	July	Non-winter	***	***	***
2025	August	Non-winter	***	***	***
2025	September	Non-winter	***	***	***

Table continued.

**Table 7.7 (Continued) All strawberries: Foreign producers' monthly production in Mexico, by product type, market, and month**

Share across in percent

Year	Month	Product type	Own processing or freezing	Fresh market / first level of sale	All reported production in Mexico
2022	January	Winter	***	***	100.0
2022	February	Winter	***	***	100.0
2022	March	Winter	***	***	100.0
2022	April	Non-winter	***	***	100.0
2022	May	Non-winter	***	***	100.0
2022	June	Non-winter	***	***	100.0
2022	July	Non-winter	***	***	100.0
2022	August	Non-winter	***	***	100.0
2022	September	Non-winter	***	***	100.0
2022	October	Winter	***	***	100.0
2022	November	Winter	***	***	100.0
2022	December	Winter	***	***	100.0
2023	January	Winter	***	***	100.0
2023	February	Winter	***	***	100.0
2023	March	Winter	***	***	100.0
2023	April	Non-winter	***	***	100.0
2023	May	Non-winter	***	***	100.0
2023	June	Non-winter	***	***	100.0
2023	July	Non-winter	***	***	100.0
2023	August	Non-winter	***	***	100.0
2023	September	Non-winter	***	***	100.0
2023	October	Winter	***	***	100.0
2023	November	Winter	***	***	100.0
2023	December	Winter	***	***	100.0

Table continued.

**Table 7.7 (Continued) All strawberries: Foreign producers' monthly production in Mexico, by product type, market, and month**

Share across in percent

Year	Month	Product type	Own processing or freezing	Fresh market / first level of sale	All reported production in Mexico
2024	January	Winter	***	***	100.0
2024	February	Winter	***	***	100.0
2024	March	Winter	***	***	100.0
2024	April	Non-winter	***	***	100.0
2024	May	Non-winter	***	***	100.0
2024	June	Non-winter	***	***	100.0
2024	July	Non-winter	***	***	100.0
2024	August	Non-winter	***	***	100.0
2024	September	Non-winter	***	***	100.0
2024	October	Winter	***	***	100.0
2024	November	Winter	***	***	100.0
2024	December	Winter	***	***	100.0
2025	January	Winter	***	***	100.0
2025	February	Winter	***	***	100.0
2025	March	Winter	***	***	100.0
2025	April	Non-winter	***	***	100.0
2025	May	Non-winter	***	***	100.0
2025	June	Non-winter	***	***	100.0
2025	July	Non-winter	***	***	100.0
2025	August	Non-winter	***	***	100.0
2025	September	Non-winter	***	***	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “—”. Data include out-of-scope strawberries (reported whether or not fresh and whether or not winter).

**Figure 7.1 All strawberries: Foreign producers' monthly production in Mexico, by product type, market, and month**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires.

Table 7.8 presents data on foreign producers' production of winter and non-winter (all other) strawberries by product type.

In each period for which data were collected, the majority (between 68.8 percent and 79.7 percent) of fresh strawberries produced were winter strawberries while the majority (between 67.0 percent and 82.6 percent) of processed strawberries were comprised of non-winter (all other) strawberries.

According to the responding producers, fresh strawberries dominated the Mexican strawberry market, accounting for over 79.5 percent of total strawberry production in Mexico in each year and interim period. Of total strawberry production in Mexico, the majority were fresh winter strawberries, followed by fresh non-winter (all other) strawberries, and the majority of all strawberry production in Mexico were winter strawberries in each period for which data were collected.

**Table 7.8 All strawberries: Foreign producers' overall strawberry production in Mexico, by product type and period**

Share across in percent

Product type	Measure	2022	2023	2024	Interim 2024	Interim 2025
Fresh: Winter strawberries	Quantity	269,435	271,875	333,925	240,662	227,814
Fresh: All other strawberries	Quantity	68,585	123,440	93,520	93,520	90,262
Fresh: Total	Quantity	338,020	395,315	427,445	334,182	318,076
Processed: Winter strawberries	Quantity	22,470	23,750	27,337	26,005	14,260
Processed: All other strawberries	Quantity	59,764	49,869	55,538	55,538	67,711
Processed: Total	Quantity	82,234	73,619	82,875	81,543	81,971
All winter strawberries	Quantity	291,905	295,625	361,262	266,667	242,074
All non-winter strawberries	Quantity	128,349	173,309	149,058	149,058	157,973
All strawberries	Quantity	420,253	468,934	510,320	415,725	400,047
Fresh: Winter strawberries	Share 1	79.7	68.8	78.1	72.0	71.6
Fresh: All other strawberries	Share 1	20.3	31.2	21.9	28.0	28.4
Fresh: Total	Share 1	100.0	100.0	100.0	100.0	100.0
Processed: Winter strawberries	Share 1	27.3	32.3	33.0	31.9	17.4
Processed: All other strawberries	Share 1	72.7	67.7	67.0	68.1	82.6
Processed: Total	Share 1	100.0	100.0	100.0	100.0	100.0
Fresh: Winter strawberries	Share 2	64.1	58.0	65.4	57.9	56.9
Fresh: All other strawberries	Share 2	16.3	26.3	18.3	22.5	22.6
Fresh: Total	Share 2	80.4	84.3	83.8	80.4	79.5
Processed: Winter strawberries	Share 2	5.3	5.1	5.4	6.3	3.6
Processed: All other strawberries	Share 2	14.2	10.6	10.9	13.4	16.9
Processed: Total	Share 2	19.6	15.7	16.2	19.6	20.5
All winter strawberries	Share 2	69.5	63.0	70.8	64.1	60.5
All non-winter strawberries	Share 2	30.5	37.0	29.2	35.9	39.5
All strawberries	Share 2	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Share 1 is the share within the product groupings of fresh vs. processed. Share 2 is the share of total production.

Table 7.9 presents data on acres harvested, production and yield for all strawberries in Mexico. Acres harvested and production of all strawberries increased annually during 2022 to 2024. As a result, the yield of strawberries also increased overall during 2022 to 2024.

**Table 7.9 All strawberries: Acres harvested, production, and yield in Mexico, by period**

Item	Measure	2022	2023	2024
Acres harvested (acres)	Quantity	32,850	37,726	39,186
Production (1,000 pounds)	Quantity	1,274,583	1,414,378	1,534,665
Yield (1,000 pounds per acre)	Ratio	38.8	37.5	39.2

Source: SIAP “Servicio de Información Agroalimentaria y Pesquera” ([https://nube.agricultura.gob.mx/cierre\\_agricola/](https://nube.agricultura.gob.mx/cierre_agricola/))

Table 7.10 compares data on Mexico production from both Mexican government data sources and questionnaire data. Both datasets indicate an annual increase in production in fresh strawberries during 2022 to 2024.

**Table 7.10 All strawberries: Foreign producers' production in Mexico, by data source and period**

Quantity in 1,000 pounds; ratio in percent

Item	Measure	2022	2023	2024
Production: SIAP	Quantity	1,274,583	1,414,378	1,534,665
Production: Questionnaires	Quantity	420,253	468,934	510,320
Coverage	Ratio	33.0	33.2	33.3

Source: SIAP “Servicio de Información Agroalimentaria y Pesquera” ([https://nube.agricultura.gob.mx/cierre\\_agricola/](https://nube.agricultura.gob.mx/cierre_agricola/))

Table 7.11 presents information on the fresh winter strawberry operations of the responding producers and exporters in Mexico. Responding Mexican producers’ fresh winter strawberry capacity and production increased annually between 2022 to 2024, but capacity and production were both lower in interim 2025 compared to interim 2024. Capacity is projected to increase slightly from 2024 to 2025 and continue to increase through 2026, while production is expected to decrease from 2024 to 2025 but to increase from 2025 to 2026. Capacity utilization remained relatively steady between 2022 to 2024 but was lower in interim 2025 compared to interim 2024.<sup>6</sup> Capacity utilization is expected to decrease from 2024 to 2025 and to decrease further into 2026.

<sup>6</sup> Several foreign producers reported capacity equal to production, citing difficulties in calculating a capacity figure for the strawberry production, likely underestimating capacity data and overestimating capacity utilization data.

The large majority (over 78.6 percent) of total shipments of responding Mexican fresh winter strawberry producers were export shipments.<sup>7</sup> Of Mexican producers' home market shipments, most were commercial shipments.<sup>8</sup> Home market shipments increased annually and were higher in interim 2024 than in interim 2025, but are expected to decrease from 2024 to 2025 and to further decrease through 2026.

From 2022 to 2024, the majority but decreasing share of total shipments consisted of within region exports to the United States, decreasing from \*\*\* percent in 2022 to \*\*\* percent in 2024, and their share was lower in interim 2025 than in interim 2024. The share of exports to the within region U.S. is expected to further decrease from 2024 to 2025 but to increase from 2025 to 2026. The responding Mexican fresh winter strawberry producers reported that \*\*\* export shipments went to the United States.<sup>9</sup> All exports to the United States by responding producers decreased from 2022 to 2023 and increased notably from 2023 to 2024, ending 2024 higher than in 2022, but were lower in interim 2025 than in interim 2024. Exports to the United States are expected to decrease from 2024 to 2025 but increase from 2025 to 2026. Adjusted total exports to the United States including resellers increased annually during 2022 to 2024 but were lower in interim 2025 than in interim 2024. Adjusted total exports to the United States are projected to increase from 2024 through 2026. The adjusted share of shipments exported to the United States to include resellers dominates total shipments, accounting for over \*\*\* percent of total shipments throughout the period for which data were collected.

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<sup>7</sup> Respondents claim that 35 percent of total Mexican strawberry production was exported, 50 percent went to further processing and about 15 percent of fresh Mexican production went to domestic consumption in 2025. Conference transcript, p. 192 (Bustamante).

<sup>8</sup> Several farmers reported they send their harvested strawberries directly to another intermediary firm, known as a "shipper" or "marketer," who then ships those exports to the United States. To avoid double counting, Staff reported these transactions as commercial shipments and reported the shipper's exports as resales to the United States. These shippers sell strawberries to retailers, distributors, and food servicers and may sell on consignment for the grower or sell produce grown and packed by the grower. Driscoll's postconference brief, p. 39.

<sup>9</sup> Respondents testified that Mexican producers also export to Canada, the industry's second largest market, and export small volumes with high value to Arabia, Japan, and the Middle East. Conference transcript, p. 192 (Bustamante).

**Table 7.11 Fresh winter strawberries: Data on industry in Mexico, by item and period**

Quantity in 1,000 pounds; interim period is January through September

Item	2022	2023	2024	Interim 2024	Interim 2025	Projection 2025	Projection 2026
Capacity	289,418	294,471	356,385	256,112	253,088	357,261	375,107
Production	269,435	271,875	333,925	240,662	227,814	324,930	338,880
End-of-period inventories	***	***	***	***	***	***	***
Internal consumption	***	***	***	***	***	***	***
Commercial home market shipments	***	***	***	***	***	***	***
Home market shipments	42,362	49,829	62,007	45,588	48,754	59,812	57,094
Exports to the United States: Within region	***	***	***	***	***	***	***
Exports to the United States: Out-of-region	***	***	***	***	***	***	***
Exports to the United States	***	***	***	***	***	***	***
Exports to all other markets	***	***	***	***	***	***	***
Export shipments	226,496	221,549	271,381	194,643	178,641	264,566	284,509
Total shipments	268,857	271,379	333,388	240,231	227,395	324,378	341,603
Resales exported to the United States: Within region	***	***	***	***	***	***	***
Resales exported to the United States: Out-of-region	***	***	***	***	***	***	***
Resales exported to the United States: Total	***	***	***	***	***	***	***
Adjusted total exports to the United States	***	***	***	***	***	***	***

Table continued.

**Table 7.11 (Continued) Fresh winter strawberries: Data on industry in Mexico, by item and period**

Shares and ratios in percent; interim period is January through September

Item	2022	2023	2024	Interim 2024	Interim 2025	Projection 2025	Projection 2026
Capacity utilization ratio	93.1	92.3	93.7	94.0	90.0	91.0	90.3
Inventory ratio to production	***	***	***	***	***	***	***
Inventory ratio to total shipments	***	***	***	***	***	***	***
Internal consumption share	***	***	***	***	***	***	***
Commercial home market shipments share	***	***	***	***	***	***	***
Home market shipments share	15.8	18.4	18.6	19.0	21.4	18.4	16.7
Within region: Exports to the United States	***	***	***	***	***	***	***
Out-of-region: Exports to the United States	***	***	***	***	***	***	***
All exports to the United States	***	***	***	***	***	***	***
Exports to all other markets share	***	***	***	***	***	***	***
Export shipments share	84.2	81.6	81.4	81.0	78.6	81.6	83.3
Total shipments share	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Share of total exports to the U.S. by producers	***	***	***	***	***	***	***
Share of total exports to the U.S. by resellers	***	***	***	***	***	***	***
Adjusted share of total shipments exported to the U.S.	***	***	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “—”.

Table 7.12 presents data on foreign producers' and resellers' exports to the United States by shipment destination. The majority (between \*\*\* percent and \*\*\* percent) of foreign producers' and resellers' exports to the United States were within region shipments.

**Table 7.12 Fresh winter strawberries: Foreign producers' and resellers in Mexico exports to the U.S., by shipment destination and period**

Shares in percent

Shipment destination	Measure	2022	2023	2024
Within region	Quantity	***	***	***
Out-of-region	Quantity	***	***	***
All regions	Quantity	***	***	***
Within region	Share	***	***	***
Out-of-region	Share	***	***	***
All regions	Share	100.0	100.0	100.0

Table continued.

**Table 7.12 (Continued) Fresh winter strawberries: Foreign producers' and resellers in Mexico exports to the U.S., by shipment destination and period**

Quantity in 1,000 pounds; Share in percent; Interim period is January through September

Shipment destination	Measure	Interim 2024	Interim 2025	Projection 2025	Projection 2026
Within region	Quantity	***	***	***	***
Out-of-region	Quantity	***	***	***	***
All regions	Quantity	***	***	***	***
Within region	Share	***	***	***	***
Out-of-region	Share	***	***	***	***
All regions	Share	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

## Exports

According to Global Trade Atlas, the leading export markets for all fresh strawberries from Mexico are the United States and Canada (table 7.13). During 2024, the United States was the top export market for all fresh strawberries from Mexico, accounting for 90.7 percent by quantity, followed by Canada, accounting for 9.1 percent.

**Table 7.13 All fresh strawberries: Exports from Mexico, by destination market and by period**

Quantity in 1,000 pounds; value in 1,000 dollars; unit values in dollars per pound; shares in percent

Destination market	Measure	2022	2023	2024
United States	Quantity	551,794	576,161	572,191
Canada	Quantity	45,703	43,500	57,267
All other destination markets	Quantity	4,776	3,163	1,218
Non-U.S. destination markets	Quantity	50,479	46,663	58,485
All destination markets	Quantity	602,273	622,824	630,676
United States	Value	1,053,868	1,149,662	1,135,446
Canada	Value	99,427	104,400	120,627
All other destination markets	Value	14,782	11,450	6,916
Non-U.S. destination markets	Value	114,209	115,850	127,543
All destination markets	Value	1,168,077	1,265,512	1,262,989
United States	Unit value	1.91	2.00	1.98
Canada	Unit value	2.18	2.40	2.11
All other destination markets	Unit value	3.10	3.62	5.68
Non-U.S. destination markets	Unit value	2.26	2.48	2.18
All destination markets	Unit value	1.94	2.03	2.00
United States	Share of quantity	91.6	92.5	90.7
Canada	Share of quantity	7.6	7.0	9.1
All other destination markets	Share of quantity	0.8	0.5	0.2
Non-U.S. destination markets	Share of quantity	8.4	7.5	9.3
All destination markets	Share of quantity	100.0	100.0	100.0

Source: Official imports statistics of imports from Mexico (constructed export statistics for Mexico) under HS subheading 0810.10 as reported by various national statistical authorities in the Global Trade Atlas Suite database, accessed January 9, 2026.

Note: United States is shown at the top followed by the top destination markets in descending order of 2024 data. All remaining top export destinations are shown in descending order of 2024 data.

## U.S. inventories of imported merchandise

Table 7.14 presents data on U.S. importers' reported within region inventories of fresh winter strawberries. There were \*\*\* within region inventories reported from nonsubject sources in any year.

Within region inventories of fresh winter strawberry imports from Mexico increased yearly, increasing annually from 2022 to 2024, and were higher in interim 2025 compared to interim 2024.<sup>10</sup> The ratio of inventories to within region U.S. shipments of imports from Mexico increased from \*\*\* percent in 2022 to \*\*\* percent in 2024 and was higher in interim 2025 than in interim 2024, but remained under \*\*\* percent in interim 2025. Similarly, the ratio of within region inventories to U.S. shipments of imports from Mexico increased yearly and was higher in interim 2025 than in interim 2024.

**Table 7.14 Fresh winter strawberries: U.S. importers' within region inventories and their ratio to select within region items, by source and period**

Quantity in 1,000 pounds; ratio in percent; interim period is January through September

Measure	Source	2022	2023	2024	Interim 2024	Interim 2025
Inventories quantity	Mexico	***	***	***	***	***
Ratio to imports	Mexico	***	***	***	***	***
Ratio to U.S. shipments of imports	Mexico	***	***	***	***	***
Inventories quantity	Nonsubject sources	***	***	***	***	***
Ratio to imports	Nonsubject sources	***	***	***	***	***
Ratio to U.S. shipments of imports	Nonsubject sources	***	***	***	***	***
Inventories quantity	All import sources	***	***	***	***	***
Ratio to imports	All import sources	***	***	***	***	***
Ratio to U.S. shipments of imports	All import sources	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “—”.

<sup>10</sup> Due to the inherent perishability of fresh strawberries, there is typically less than a week from picking the strawberries to consumption by the consumer, therefore, firms reported limited inventories. Conference transcript, p. 166 (Marano). Three firms reported within region inventories, and four firms reported national inventories. Although U.S. importer \*\*\*.

Table 7.15 presents data on U.S. importers' reported national inventories of fresh winter strawberries. There were \*\*\* national inventories reported by nonsubject U.S. importers of fresh winter strawberries. National inventories of U.S. imports of fresh winter strawberries from Mexico increased annually from 2022 to 2024 and were higher in interim 2025 compared to interim 2024. The ratio of national inventories to imports of fresh winter strawberries from Mexico increased from \*\*\* percent in 2022 to \*\*\* percent in 2024 and was higher in interim 2025 than in interim 2024. The ratio of national inventories to U.S. shipments of imports from Mexico and to total shipments increased annually from 2022 to 2024 and were both higher in interim 2025 than in interim 2025.

**Table 7.15 Fresh winter strawberries: U.S. importers' national inventories and their ratio to select items, by source and period**

Quantity in 1,000 pounds; ratio in percent; interim period is January through September

Measure	Source	2022	2023	2024	Interim 2024	Interim 2025
Inventories quantity	Mexico	***	***	***	***	***
Ratio to imports	Mexico	***	***	***	***	***
Ratio to U.S. shipments of imports	Mexico	***	***	***	***	***
Ratio to total shipments of imports	Mexico	***	***	***	***	***
Inventories quantity	Nonsubject sources	***	***	***	***	***
Ratio to imports	Nonsubject sources	***	***	***	***	***
Ratio to U.S. shipments of imports	Nonsubject sources	***	***	***	***	***
Ratio to total shipments of imports	Nonsubject sources	***	***	***	***	***
Inventories quantity	All import sources	***	***	***	***	***
Ratio to imports	All import sources	***	***	***	***	***
Ratio to U.S. shipments of imports	All import sources	***	***	***	***	***
Ratio to total shipments of imports	All import sources	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “—”.

## U.S. importers' outstanding orders

The Commission requested importers to indicate whether they imported or arranged for the importation of fresh winter strawberries after September 30, 2025. Their reported data are presented in table 7.16. Arranged imports from Mexico accounted for nearly all arranged imports after September 30, 2025. U.S. importers \*\*\* reported arranged imports from nonsubject sources between October 1, 2025, and December 31, 2025.

**Table 7.16 Fresh winter strawberries: Arranged imports, by source and by period**  
Quantity in 1,000 pounds

Source	Q4 2025	Q1 2026	Q2 2026	Q3 2026	Total
Mexico	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “—”.

## Third-country trade actions

Based on available information, fresh winter strawberries from Mexico have not been subject to other antidumping or countervailing duty investigations outside the United States.

## Information on nonsubject countries

Table 7.17 presents global export data for all fresh strawberries. In 2024, Mexico was the largest global exporter of fresh strawberries, responsible for 25.4 percent of global exports by quantity. The next largest exporters by quantity in 2024 were Spain (22.7 percent of global export quantity), the United States (16.6 percent), Greece (7.1 percent), and the Netherlands (5.3 percent). Between 2022 and 2024, global export value of fresh strawberries grew by 14.6 percent, while Mexico's export value increased by 8.1 percent. By volume, however, global exports fell by 0.8 percent between 2022 and 2024, while export volume from Mexico increased by 4.7 percent.

**Table 7.17 All fresh strawberries: Global exports, by reporting country and by period**

Quantity in 1,000 pounds, value in \$1,000

Exporting country	Measure	2022	2023	2024
United States	Quantity	324,425	334,872	411,656
Mexico	Quantity	602,273	622,824	630,676
Spain	Quantity	633,428	558,018	563,411
Greece	Quantity	165,769	184,027	176,543
Netherlands	Quantity	139,504	134,883	132,087
Egypt	Quantity	188,752	109,225	117,846
Belgium	Quantity	84,021	79,273	79,061
Turkey	Quantity	82,423	83,044	45,976
Azerbaijan	Quantity	22,231	41,392	45,815
Morocco	Quantity	49,338	38,928	42,560
Poland	Quantity	31,463	44,661	34,913
China	Quantity	7,956	21,295	32,960
All other exporters	Quantity	176,590	187,048	173,770
All reporting exporters	Quantity	2,508,175	2,439,490	2,487,274
United States	Value	596,565	632,318	703,341
Mexico	Value	1,168,077	1,265,512	1,262,989
Spain	Value	794,816	773,423	852,371
Greece	Value	141,571	165,578	182,120
Netherlands	Value	296,731	334,466	382,054
Egypt	Value	109,093	132,308	140,332
Belgium	Value	164,610	176,446	218,624
Turkey	Value	31,579	37,088	23,296
Azerbaijan	Value	17,913	25,569	26,364
Morocco	Value	63,124	63,300	76,205
Poland	Value	25,610	31,744	29,111
China	Value	11,586	19,897	34,089
All other exporters	Value	369,727	419,053	412,500
All reporting exporters	Value	3,791,002	4,076,699	4,343,397

Table continued.

**Table 7.17 All fresh strawberries: Global exports, by reporting country and by period**

Unit values in dollars per pound; Shares in percent

Exporting country	Measure	2022	2023	2024
United States	Unit value	1.84	1.89	1.71
Mexico	Unit value	1.94	2.03	2.00
Spain	Unit value	1.25	1.39	1.51
Greece	Unit value	0.85	0.90	1.03
Netherlands	Unit value	2.13	2.48	2.89
Egypt	Unit value	0.58	1.21	1.19
Belgium	Unit value	1.96	2.23	2.77
Turkey	Unit value	0.38	0.45	0.51
Azerbaijan	Unit value	0.81	0.62	0.58
Morocco	Unit value	1.28	1.63	1.79
Poland	Unit value	0.81	0.71	0.83
China	Unit value	1.46	0.93	1.03
All other exporters	Unit value	2.09	2.24	2.37
All reporting exporters	Unit value	1.51	1.67	1.75
United States	Share of quantity	12.9	13.7	16.6
Mexico	Share of quantity	24.0	25.5	25.4
Spain	Share of quantity	25.3	22.9	22.7
Greece	Share of quantity	6.6	7.5	7.1
Netherlands	Share of quantity	5.6	5.5	5.3
Egypt	Share of quantity	7.5	4.5	4.7
Belgium	Share of quantity	3.3	3.2	3.2
Turkey	Share of quantity	3.3	3.4	1.8
Azerbaijan	Share of quantity	0.9	1.7	1.8
Morocco	Share of quantity	2.0	1.6	1.7
Poland	Share of quantity	1.3	1.8	1.4
China	Share of quantity	0.3	0.9	1.3
All other exporters	Share of quantity	7.0	7.7	7.0
All reporting exporters	Share of quantity	100.0	100.0	100.0

Source: Official exports statistics and official imports statistics of imports from Mexico (constructed export statistics for Mexico) under HS subheading 0810.10 as reported by various national statistical authorities in the Global Trade Atlas Suite database, accessed January 9, 2026.

Note: United States is shown at the top followed by the countries under investigation, all remaining top exporting countries in descending order of 2024 data.



**APPENDIX A**  
**FEDERAL REGISTER NOTICES**



The Commission makes available notices relevant to its investigations and reviews on its website, [www.usitc.gov](http://www.usitc.gov). In addition, the following tabulation presents, in chronological order, Federal Register notices issued by the Commission and Commerce during the current proceeding.

Citation	Title	Link
91 FR 380, January 6, 2026	Fresh Winter Strawberries From Mexico; Institution of Antidumping Duty Investigation and Scheduling of Preliminary Phase Investigation	<a href="https://www.govinfo.gov/content/pkg/FR-2026-01-06/pdf/2026-00011.pdf">https://www.govinfo.gov/content/pkg/FR-2026-01-06/pdf/2026-00011.pdf</a>
91 FR 2910, January 23, 2026	Notice of Extension of the Deadline for Determining the Adequacy of the Antidumping Duty Petition: Fresh Winter Strawberries From Mexico	<a href="https://www.govinfo.gov/content/pkg/FR-2026-01-23/pdf/2026-01214.pdf">https://www.govinfo.gov/content/pkg/FR-2026-01-23/pdf/2026-01214.pdf</a>
91 FR 4107, January 30, 2026	Fresh Winter Strawberries From Mexico; Revised Schedule for the Subject Investigation	<a href="https://www.govinfo.gov/content/pkg/FR-2026-01-30/pdf/2026-01812.pdf">https://www.govinfo.gov/content/pkg/FR-2026-01-30/pdf/2026-01812.pdf</a>
91 FR 6822, February 13, 2026	Fresh Winter Strawberries From Mexico: Initiation of Less-Than-Fair-Value Investigation	<a href="https://www.govinfo.gov/content/pkg/FR-2026-02-13/pdf/2026-02931.pdf">https://www.govinfo.gov/content/pkg/FR-2026-02-13/pdf/2026-02931.pdf</a>



**APPENDIX B**

**LIST OF CONFERENCE WITNESSES**



## CALENDAR OF PUBLIC PRELIMINARY CONFERENCE

Those listed below appeared as witnesses at the United States International Trade Commission's preliminary conference:

**Subject:** Fresh Winter Strawberries from Mexico  
**Inv. Nos.:** 731-TA-1770 (Preliminary)  
**Date and Time:** January 21, 2026 – 9:30 a.m.

Sessions were held in connection with this preliminary phase investigation **all virtually** via Webex

### **EMBASSY APPEARANCE:**

**Government of Mexico  
Washington, D.C.**

**Rodrigo Andrés Velázquez García, Director of International Affairs of the  
International Trade Practices Unit from the Secretariat of Economy**

### **STATE GOVERNMENT APPEARANCE:**

**California Strawberry Commission  
Watsonville, CA**

**Rick Tomlinson, President**

### **OPENING REMARKS:**

In Support of Imposition (**Daniel B. Pickard**, Buchanan Ingersoll & Rooney PC)  
In Opposition to Imposition (**Matthew R. Nicely**, Akin Gump Strauss Hauer & Feld LLP)

**In Support of the Imposition of the  
Antidumping Duty Order:**

Buchanan Ingersoll & Rooney PC  
Washington, D.C.  
on behalf of

Strawberry Growers for Fair Trade

**Kenneth Parker**, Executive Director, Florida Strawberry Growers Association

**In Support of the Imposition of the  
Antidumping Duty Order (continued):**

**John Sizemore**, Owner, Sizemore Farms

**Daniel B. Pickard** )  
**Grace E. Welborn** ) – OF COUNSEL  
**Miriam Taylor** )

**In Opposition to the Imposition of the  
Antidumping Duty Order:**

Akin Gump Strauss Hauer & Feld LLP  
Washington, D.C.  
on behalf of

Driscoll's, Inc.  
Driscoll's Operaciones, S.A. de C.V.

**Daniel Mathieson**, President, Driscoll's of the Americas

**Daniel Lambert**, Vice President Product Leadership, Driscoll's, Inc.

**Mark Greeff**, Vice President and GM Eastern Region, Driscoll's, Inc.

**Casey Rose**, Vice President Sales, Driscoll's, Inc.

**Dave Murray**, Partner, GoodFarms, Inc.

**Ernie Farley**, Partner, GoodFarms, Inc.

**Todd Eagen**, Director of Sales, GoodFarms, Inc.

**Stefanie Katzman**, Chief Executive Officer, S. Katzman Produce, Inc.

**Martha Hilton**, Vice President for Produce & Floral, Wegmans Food Markets

**Andrew Wiemers**, General Manager for Latin America, Gem-Pack Berries

**Damon Marano**, President and Chief Business Officer, Anthony Marano Company

**Tom Prusa**, Professor of Economics, Rutgers University

**Jim Dougan**, Partner, ION Economics, LLC

**In Opposition to the Imposition of the  
Antidumping Duty Order (continued):**

**Jennifer Lutz**, Partner, ION Economics, LLC

**Matthew R. Nicely** )  
**Devin S. Sikes** )  
 ) – OF COUNSEL  
**Julia K. Eppard** )  
**Ruby Rodriguez** )

White & Case LLP  
Washington, D.C.  
on behalf of

Aneberries A.C. (“Aneberries”)  
Mainland Farms S.A. de C.V. (“Mainland Farms”)

**Jose Luis Bustamante**, Board Secretary and Member of Executive Committee,  
Aneberries

**Jean Christophe Hesteanu**, Director General and Chief Executive Officer,  
Mainland Farms

**Gregory J. Spak** )  
 ) – OF COUNSEL  
**Alex Dilley** )

Winton & Chapman PLLC  
Washington, D.C.  
on behalf of

San Vicente Camalu S.P.R. de R.L (“San Vicente”)

**Salvador Garcia Valdez**, San Vicente

**Michael J. Chapman** )  
**Jeffrey M. Winton** )  
 ) – OF COUNSEL  
**Rachel Hauser** )  
**Alexis Cherry** )

**REBUTTAL/CLOSING REMARKS:**

In Support of Imposition (**Daniel B. Pickard**, Buchanan Ingersoll & Rooney PC)  
In Opposition to Imposition (**Julia K. Eppard**, Akin Gump Strauss Hauer & Feld LLP)



**APPENDIX C**  
**SUMMARY DATA**



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## Winter: Regional

**Table C.1**

**Fresh winter strawberries: Summary data concerning the within region U.S. market, by item and period**

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through September

Item	Reported data					Period change comparisons			
	2022	Calendar year 2023	2024	Interim 2024	2025	2022-24	Calendar year 2022-23	2023-24	Interim 2024-25
<b>Within region U.S. consumption quantity:</b>									
Amount.....	***	***	***	***	***	▲***	▼***	▲***	▼***
<b>Producers' share (fn1):</b>									
Within region producers.....	***	***	***	***	***	▼***	▲***	▼***	▲***
Out-of-region producers.....	***	***	***	***	***	▲***	▲***	▲***	▼***
U.S. producers.....	***	***	***	***	***	▲***	▲***	▼***	▲***
<b>Importers' share (fn1):</b>									
Mexico.....	***	***	***	***	***	▼***	▼***	▲***	▼***
Nonsubject sources.....	***	***	***	***	***	▼***	▲***	▼***	▼***
All import sources.....	***	***	***	***	***	▼***	▼***	▲***	▼***
<b>Within region U.S. consumption value:</b>									
Amount.....	***	***	***	***	***	▲***	▼***	▲***	▼***
<b>Producers' share (fn1):</b>									
Within region producers.....	***	***	***	***	***	▼***	▲***	▼***	▲***
Out-of-region producers.....	***	***	***	***	***	▲***	▲***	▲***	▲***
U.S. producers.....	***	***	***	***	***	▼***	▲***	▼***	▲***
<b>Importers' share (fn1):</b>									
Mexico.....	***	***	***	***	***	▲***	▼***	▲***	▼***
Nonsubject sources.....	***	***	***	***	***	▲***	▲***	▼***	▼***
All import sources.....	***	***	***	***	***	▲***	▼***	▲***	▼***
<b>U.S. imports from:</b>									
<b>Mexico:</b>									
Quantity.....	285,700	246,705	334,591	211,106	195,809	▲17.1	▼(13.6)	▲35.6	▼(7.2)
Value.....	623,419	572,061	749,448	446,523	398,444	▲20.2	▼(8.2)	▲31.0	▼(10.8)
Unit value.....	\$2.18	\$2.32	\$2.24	\$2.12	\$2.03	▲2.6	▲6.3	▼(3.4)	▼(3.8)
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***
<b>Nonsubject sources:</b>									
Quantity.....	4,197	4,241	4,837	2,849	1,903	▲15.3	▲1.0	▲14.1	▼(33.2)
Value.....	10,312	13,599	15,728	9,485	7,269	▲52.5	▲31.9	▲15.7	▼(23.4)
Unit value.....	\$2.46	\$3.21	\$3.25	\$3.33	\$3.82	▲32.3	▲30.5	▲1.4	▲14.7
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
<b>All import sources:</b>									
Quantity.....	289,897	250,945	339,429	213,956	197,712	▲17.1	▼(13.4)	▲35.3	▼(7.6)
Value.....	633,731	585,660	765,177	456,009	405,713	▲20.7	▼(7.6)	▲30.7	▼(11.0)
Unit value.....	\$2.19	\$2.33	\$2.25	\$2.13	\$2.05	▲3.1	▲6.8	▼(3.4)	▼(3.7)
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***
<b>Within region U.S. producers':</b>									
Production quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***
<b>U.S. shipments (fn2):</b>									
Quantity.....	***	***	***	***	***	▲***	▼***	▲***	▲***
Value.....	***	***	***	***	***	▲***	▲***	▼***	▲***
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▼***
<b>U.S. shipments from out-of-region producers (fn2):</b>									
Quantity.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Value.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Unit value.....	***	***	***	***	***	▼***	▼***	▼***	▲***
<b>U.S. shipments including out-of-region producers (fn2):</b>									
Quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Value.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Unit value.....	***	***	***	***	***	▼***	▲***	▼***	▲***

Table continued.

**Table C.1 Continued**

**Fresh winter strawberries: Summary data concerning the within region U.S. market, by item and period**

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through September

Item	Reported data					Period change comparisons			
	Calendar year		2024	Interim		Calendar year		Interim	
	2022	2023		2024	2025	2022-24	2022-23	2023-24	2024-25
Within region U.S. producers': Continued									
Export shipments:									
Quantity.....	***	***	***	***	***	▲***	▲***	▼***	▲***
Value.....	***	***	***	***	***	▼***	▲***	▼***	▲***
Unit value.....	***	***	***	***	***	▼***	▲***	▼***	▲***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
Inventories/total shipments (fn1).....	***	***	***	***	***	***	***	***	***
Production workers.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Hours worked (1,000s).....	***	***	***	***	***	▲***	▲***	▼***	▲***
Wages paid (\$1,000).....	***	***	***	***	***	▲***	▲***	▼***	▲***
Hourly wages (dollars per hour).....	***	***	***	***	***	▲***	▲***	▲***	▲***
Productivity (pounds per hour).....	***	***	***	***	***	▼***	▼***	▲***	▲***
Unit labor costs.....	***	***	***	***	***	▲***	▲***	▼***	▼***
Net sales:									
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***
Value.....	***	***	***	***	***	▲***	▲***	▼***	▲***
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▲***
Cost of goods sold (COGS).....	***	***	***	***	***	▲***	▲***	▼***	▲***
Gross profit or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***
SG&A expenses.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Operating income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***
Net income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***
Unit COGS.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Unit SG&A expenses.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Unit operating income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***
Unit net income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***
COGS/sales (fn1).....	***	***	***	***	***	▲***	▲***	▲***	▲***
Operating income or (loss)/sales (fn1).....	***	***	***	***	***	▼***	▼***	▼***	▼***
Net income or (loss)/sales (fn1).....	***	***	***	***	***	▼***	▼***	▼***	▼***
Capital expenditures.....	***	***	***	***	***	▼***	▲***	▼***	▼***
Research and development expenses.....	***	***	***	***	***	***	***	***	***
Total assets.....	***	***	***	***	***	▲***	▲***	▲***	***

Source: Compiled from data submitted in response to Commission questionnaires and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, limited to October through March and adjusted to report only within region imports by source using the experience of respondents to the Commission's U.S. importer questionnaire. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values. 508-compliant tables for these data are contained in parts 3, 4, 6, and 7 of this report.

fn1.--Reported data are in percent and period changes are in percentage points.

fn2.--All U.S. producer data except for U.S. shipments is presented for within region U.S. producers' based on the region the fresh winter strawberries were harvested. U.S. shipments for purposes of within region apparent consumption includes breakouts for both the within region U.S. producers and out-of-region U.S. producers' shipments.

fn3.--Percent changes only calculated when both comparison values represent profits; The directional change in profitability provided when one or both comparison values represent a loss.

Note.--Shares and ratios shown as "0.0" percent represent non-zero values less than "0.05" percent (if positive) and greater than "(0.05)" percent (if negative). Zeroes, null values, and undefined calculations are suppressed and shown as "--". Period changes preceded by a "▲" represent an increase, while period changes preceded by a "▼" represent a decrease.

## Winter: National

**Table C.2**

**Fresh winter strawberries: Summary data concerning the national U.S. market, by item and period**

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through September

Item	Reported data					Period change comparisons			
	2022	Calendar year 2023	2024	Interim 2024	2025	2022-24	Calendar year 2022-23	2023-24	Interim 2024-25
<b>National U.S. consumption quantity:</b>									
Amount.....	***	***	***	***	***	▲***	▼***	▲***	▼***
Producers' share (fn1):									
Within region producers.....	***	***	***	***	***	▼***	▼***	▼***	▲***
Out-of-region producers.....	***	***	***	***	***	▲***	▲***	▲***	▼***
U.S. producers.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Importers' share (fn1):									
Mexico.....	***	***	***	***	***	▼***	▼***	▼***	▼***
Nonsubject sources.....	***	***	***	***	***	▼***	▲***	▼***	▼***
All import sources.....	***	***	***	***	***	▼***	▼***	▼***	▼***
<b>National U.S. consumption value:</b>									
Amount.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Producers' share (fn1):									
Within region producers.....	***	***	***	***	***	▼***	▲***	▼***	▲***
Out-of-region producers.....	***	***	***	***	***	▲***	▼***	▲***	▲***
U.S. producers.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Importers' share (fn1):									
Mexico.....	***	***	***	***	***	▼***	▼***	▼***	▼***
Nonsubject sources.....	***	***	***	***	***	▲***	▲***	▼***	▼***
All import sources.....	***	***	***	***	***	▼***	▼***	▼***	▼***
<b>U.S. imports from:</b>									
Mexico:									
Quantity.....	421,065	401,295	468,374	338,781	322,992	▲11.2	▼(4.7)	▲16.7	▼(4.7)
Value.....	918,796	930,527	1,049,108	716,577	657,243	▲14.2	▲1.3	▲12.7	▼(8.3)
Unit value.....	\$2.18	\$2.32	\$2.24	\$2.12	\$2.03	▲2.6	▲6.3	▼(3.4)	▼(3.8)
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Nonsubject sources:									
Quantity.....	5,072	5,278	5,545	3,416	2,201	▲9.3	▲4.1	▲5.1	▼(35.6)
Value.....	12,463	16,925	18,029	11,370	8,408	▲44.7	▲35.8	▲6.5	▼(26.1)
Unit value.....	\$2.46	\$3.21	\$3.25	\$3.33	\$3.82	▲32.3	▲30.5	▲1.4	▲14.7
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
All import sources:									
Quantity.....	426,138	406,573	473,920	342,197	325,193	▲11.2	▼(4.6)	▲16.6	▼(5.0)
Value.....	931,259	947,451	1,067,137	727,947	665,651	▲14.6	▲1.7	▲12.6	▼(8.6)
Unit value.....	\$2.19	\$2.33	\$2.25	\$2.13	\$2.05	▲3.0	▲6.6	▼(3.4)	▼(3.8)
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***
<b>U.S. producers':</b>									
Production quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***
U.S. shipments from within region producers (fn2):									
Quantity.....	***	***	***	***	***	▲***	▼***	▲***	▲***
Value.....	***	***	***	***	***	▲***	▲***	▼***	▲***
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▼***
U.S. shipments from out-of-region region producers (fn2):									
Quantity.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Value.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Unit value.....	***	***	***	***	***	▼***	▼***	▼***	▲***
U.S. shipments (fn2):									
Quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Value.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Unit value.....	***	***	***	***	***	▼***	▼***	▼***	▲***

Table continued.

**Table C.2 Continued**

**Fresh winter strawberries: Summary data concerning the national U.S. market, by item and period**

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through September

Item	Reported data					Period change comparisons				
	Calendar year		Interim			Calendar year		Interim		
	2022	2023	2024	2024	2025	2022-24	2022-23	2023-24	2024-25	
U.S. producers: Continued										
Export shipments:										
Quantity.....	***	***	***	***	***	▲***	▲***	▲***	▼***	
Value.....	***	***	***	***	***	▲***	▲***	▲***	▼***	
Unit value.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***	
Inventories/total shipments (fn1).....	***	***	***	***	***	***	***	***	***	
Production workers.....	***	***	***	***	***	▲***	▲***	▲***	▼***	
Hours worked (1,000s).....	***	***	***	***	***	▲***	▲***	▼***	▲***	
Wages paid (\$1,000).....	***	***	***	***	***	▲***	▲***	▼***	▲***	
Hourly wages (dollars per hour).....	***	***	***	***	***	▲***	▲***	▲***	▲***	
Productivity (pounds per hour).....	***	***	***	***	***	▼***	▼***	▲***	▲***	
Unit labor costs.....	***	***	***	***	***	▲***	▲***	▼***	▲***	
Net sales:										
Quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
Value.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
Unit value.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
Cost of goods sold (COGS).....	***	***	***	***	***	▲***	▲***	▲***	▲***	
Gross profit or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▲***	▼***	
SG&A expenses.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
Operating income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Net income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Unit COGS.....	***	***	***	***	***	▲***	▲***	▼***	▲***	
Unit SG&A expenses.....	***	***	***	***	***	▲***	▲***	▲***	▼***	
Unit operating income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Unit net income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	
COGS/sales (fn1).....	***	***	***	***	***	▲***	▲***	▲***	▲***	
Operating income or (loss)/sales (fn1).....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Net income or (loss)/sales (fn1).....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Capital expenditures.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Research and development expenses.....	***	***	***	***	***	▲***	▲***	▲***	▼***	
Total assets.....	***	***	***	***	***	▲***	▲***	▼***	***	

Source: Compiled from data submitted in response to Commission questionnaires and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, limited to October through March. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values. 508-compliant tables for these data are contained in parts 3, 4, 6, and 7 of this report.

fn1.--Reported data are in percent and period changes are in percentage points.

fn2.--U.S. producer data is presented for the national market inclusive of all U.S. producers' of fresh winter strawberries. The breakout for U.S. shipments on the region the fresh winter strawberries were harvested is based on U.S. shipments to all regions. National apparent consumption is based on the U.S. producer total U.S. shipments regardless of region of harvest.

fn3.--Percent changes only calculated when both comparison values represent profits; The directional change in profitability provided when one or both comparison values represent a loss.

Note.--Shares and ratios shown as "0.0" percent represent non-zero values less than "0.05" percent (if positive) and greater than "(0.05)" percent (if negative). Zeros, null values, and undefined calculations are suppressed and shown as "--". Period changes preceded by a "▲" represent an increase, while period changes preceded by a "▼" represent a decrease.

## Year Round: Regional

**Table C.3**

**All fresh strawberries: Summary data concerning the within region U.S. market, by item and period**

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through September

Item	Reported data					Period change comparisons				
	Calendar year		2024	Interim	2025	Calendar year		2023-24	Interim	
	2022	2023		2024		2022-24	2022-23		2024-25	
<b>Within region U.S. consumption quantity:</b>										
Amount.....	***	***	***	***	***	▲***	▼***	▲***	▲***	
<b>Producers' share (fn1):</b>										
Within region producers.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Out-of-region producers.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
U.S. producers.....	***	***	***	***	***	▲***	▲***	▼***	▲***	
<b>Importers' share (fn1):</b>										
FWS: Mexico.....	***	***	***	***	***	▲***	▼***	▲***	▼***	
FWS: Nonsubject sources.....	***	***	***	***	***	▼***	▲***	▼***	▼***	
FWS: All import sources.....	***	***	***	***	***	▲***	▼***	▲***	▼***	
Non-winter: All import sources.....	***	***	***	***	***	▼***	▲***	▼***	▼***	
All fresh strawberries.....	***	***	***	***	***	▼***	▼***	▲***	▼***	
<b>Within region U.S. consumption value:</b>										
Amount.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
<b>Producers' share (fn1):</b>										
Within region producers.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Out-of-region producers.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
U.S. producers.....	***	***	***	***	***	▲***	▲***	▼***	▲***	
<b>Importers' share (fn1):</b>										
FWS: Mexico.....	***	***	***	***	***	▲***	▼***	▲***	▼***	
FWS: Nonsubject sources.....	***	***	***	***	***	▲***	▲***	▼***	▼***	
FWS: All import sources.....	***	***	***	***	***	▲***	▼***	▲***	▼***	
Non-winter: All import sources.....	***	***	***	***	***	▼***	▲***	▼***	▼***	
All fresh strawberries.....	***	***	***	***	***	▼***	▼***	▲***	▼***	
<b>U.S. imports from:</b>										
<b>FWS: Mexico:</b>										
Quantity.....	285,700	246,705	334,591	211,106	195,809	▲17.1	▼(13.6)	▲35.6	▼(7.2)	
Value.....	623,419	572,061	749,448	446,523	398,444	▲20.2	▼(8.2)	▲31.0	▼(10.8)	
Unit value.....	\$2.18	\$2.32	\$2.24	\$2.12	\$2.03	▲2.6	▲6.3	▼(3.4)	▼(3.8)	
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
<b>FWS: Nonsubject sources:</b>										
Quantity.....	4,197	4,241	4,837	2,849	1,903	▲15.3	▲1.0	▲14.1	▼(33.2)	
Value.....	10,312	13,599	15,728	9,485	7,269	▲52.5	▲31.9	▲15.7	▼(23.4)	
Unit value.....	\$2.46	\$3.21	\$3.25	\$3.33	\$3.82	▲32.3	▲30.5	▲1.4	▲14.7	
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***	
<b>FWS: All import sources:</b>										
Quantity.....	289,897	250,945	339,429	213,956	197,712	▲17.1	▼(13.4)	▲35.3	▼(7.6)	
Value.....	633,731	585,660	765,177	456,009	405,713	▲20.7	▼(7.6)	▲30.7	▼(11.0)	
Unit value.....	\$2.19	\$2.33	\$2.25	\$2.13	\$2.05	▲3.1	▲6.8	▼(3.4)	▼(3.7)	
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
<b>Fresh non-winter strawberries: All import sources:</b>										
Quantity.....	30,579	31,221	27,164	27,553	14,883	▼(11.2)	▲2.1	▼(13.0)	▼(46.0)	
Value.....	40,590	48,566	36,931	37,272	18,424	▼(9.0)	▲19.7	▼(24.0)	▼(50.6)	
Unit value.....	\$1.33	\$1.56	\$1.36	\$1.35	\$1.24	▲2.4	▲17.2	▼(12.6)	▼(8.5)	
Ending inventory quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
<b>All fresh strawberries: All import sources:</b>										
Quantity.....	320,476	282,166	366,593	241,508	212,595	▲14.4	▼(12.0)	▲29.9	▼(12.0)	
Value.....	674,321	634,226	802,108	493,280	424,138	▲19.0	▼(5.9)	▲26.5	▼(14.0)	
Unit value.....	\$2.10	\$2.25	\$2.19	\$2.04	\$2.00	▲4.0	▲6.8	▼(2.7)	▼(2.3)	
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
<b>Within region U.S. producers':</b>										
Production quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
<b>U.S. shipments (fn2):</b>										
Quantity.....	***	***	***	***	***	▲***	▼***	▲***	▲***	
Value.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▼***	
<b>U.S. shipments from out-of-region producers (fn2):</b>										
Quantity.....	***	***	***	***	***	▲***	▼***	▲***	▲***	
Value.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▲***	
<b>U.S. shipments including out-of-region producers (fn2):</b>										
Quantity.....	***	***	***	***	***	▲***	▼***	▲***	▲***	
Value.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▲***	

Table continued.

**Table C.3 Continued**

**All fresh strawberries: Summary data concerning the within region U.S. market, by item and period**

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through September

Item	Reported data					Period change comparisons				
	2022	2023	2024	2024	2025	2022-24	2022-23	2023-24	2024-25	
Within region U.S. producers': Continued										
Export shipments:										
Quantity.....	***	***	***	***	***	▲***	▲***	▼***	▲***	
Value.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Unit value.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***	
Inventories/total shipments (fn1).....	***	***	***	***	***	***	***	***	***	
Production workers.....	***	***	***	***	***	▲***	▲***	▲***	▼***	
Hours worked (1,000s).....	***	***	***	***	***	▲***	▲***	▼***	▲***	
Wages paid (\$1,000).....	***	***	***	***	***	▲***	▲***	▼***	▲***	
Hourly wages (dollars per hour).....	***	***	***	***	***	▲***	▲***	▲***	▲***	
Productivity (pounds per hour).....	***	***	***	***	***	▼***	▼***	▲***	▲***	
Unit labor costs.....	***	***	***	***	***	▲***	▲***	▼***	▼***	
Net sales:										
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
Value.....	***	***	***	***	***	▲***	▲***	▼***	▲***	
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▼***	
Cost of goods sold (COGS).....	***	***	***	***	***	▲***	▲***	▲***	▲***	
Gross profit or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	
SG&A expenses.....	***	***	***	***	***	▲***	▲***	▲***	▼***	
Operating income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Net income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Unit COGS.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
Unit SG&A expenses.....	***	***	***	***	***	▲***	▲***	▲***	▼***	
Unit operating income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Unit net income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	
COGS/sales (fn1).....	***	***	***	***	***	▲***	▲***	▲***	▲***	
Operating income or (loss)/sales (fn1).....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Net income or (loss)/sales (fn1).....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Capital expenditures.....	***	***	***	***	***	▼***	▲***	▼***	▼***	
Research and development expenses.....	***	***	***	***	***	***	***	***	***	
Total assets.....	***	***	***	***	***	▲***	▲***	▲***	***	

Source: Compiled from data submitted in response to Commission questionnaires and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.2010, 0810.10.2020, 0810.10.2040, 0810.10.2060, 0810.10.2080, 0810.10.2090, 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026 adjusted to report only within region imports by source using the experience of respondents to the Commission's U.S. importer questionnaire. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values. 508-compliant tables for these data are contained in appendix E of this report.

fn1.--Reported data are in percent and period changes are in percentage points.

fn2.--All U.S. producer data except for U.S. shipments is presented for within region U.S. producers' based on the region the fresh strawberries were harvested. U.S. shipments for purposes of within region apparent consumption includes breakouts for both the within region U.S. producers and out-of-region U.S. producers' shipments.

fn3.--Percent changes only calculated when both comparison values represent profits; The directional change in profitability provided when one or both comparison values represent a loss.

Note.--Shares and ratios shown as "0.0" percent represent non-zero values less than "0.05" percent (if positive) and greater than "(0.05)" percent (if negative). Zeros, null values, and undefined calculations are suppressed and shown as "--". Period changes preceded by a "▲" represent an increase, while period changes preceded by a "▼" represent a decrease.

## Year Round: National

**Table C.4**

**All fresh strawberries: Summary data concerning the national U.S. market, by item and period**

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through September

Item	Reported data					Period change comparisons				
	Calendar year		2024	Interim	2025	Calendar year		Interim		
	2022	2023		2024		2022-24	2022-23	2023-24	2024-25	
<b>National U.S. consumption quantity:</b>										
Amount.....	***	***	***	***	***	▲***	▲***	▲***	▲***	▲***
<b>Producers' share (fn1):</b>										
Within region producers.....	***	***	***	***	***	▼***	▼***	▼***	▲***	▲***
Out-of-region producers.....	***	***	***	***	***	▲***	▼***	▲***	▲***	▲***
U.S. producers.....	***	***	***	***	***	▲***	▼***	▲***	▲***	▲***
<b>Importers' share (fn1):</b>										
FWS: Mexico.....	***	***	***	***	***	▼***	▼***	▲***	▼***	▼***
FWS: Nonsubject sources.....	***	***	***	***	***	▼***	▲***	▼***	▼***	▼***
FWS: All import sources.....	***	***	***	***	***	▼***	▼***	▲***	▲***	▼***
Non-winter: All import sources.....	***	***	***	***	***	▼***	▲***	▼***	▲***	▲***
All fresh strawberries.....	***	***	***	***	***	▼***	▲***	▼***	▼***	▼***
<b>National U.S. consumption value:</b>										
Amount.....	***	***	***	***	***	▲***	▲***	▲***	▲***	▲***
<b>Producers' share (fn1):</b>										
Within region producers.....	***	***	***	***	***	▼***	▼***	▼***	▲***	▲***
Out-of-region producers.....	***	***	***	***	***	▲***	▼***	▲***	▲***	▲***
U.S. producers.....	***	***	***	***	***	▲***	▼***	▲***	▲***	▲***
<b>Importers' share (fn1):</b>										
FWS: Mexico.....	***	***	***	***	***	▼***	▼***	▲***	▼***	▼***
FWS: Nonsubject sources.....	***	***	***	***	***	▲***	▲***	▼***	▼***	▼***
FWS: All import sources.....	***	***	***	***	***	▼***	▼***	▲***	▼***	▼***
Non-winter: All import sources.....	***	***	***	***	***	▼***	▲***	▼***	▼***	▼***
All fresh strawberries.....	***	***	***	***	***	▼***	▲***	▼***	▼***	▼***
<b>U.S. imports from:</b>										
<b>FWS: Mexico:</b>										
Quantity.....	421,065	401,295	468,374	338,781	322,992	▲11.2	▼(4.7)	▲16.7	▼(4.7)	▼(4.7)
Value.....	918,796	930,527	1,049,108	716,577	657,243	▲14.2	▲1.3	▲12.7	▼(8.3)	▼(8.3)
Unit value.....	\$2.18	\$2.32	\$2.24	\$2.12	\$2.03	▲2.6	▲6.3	▼(3.4)	▼(3.8)	▼(3.8)
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***	▲***
<b>FWS: Nonsubject sources:</b>										
Quantity.....	5,072	5,278	5,545	3,416	2,201	▲9.3	▲4.1	▲5.1	▼(35.6)	▼(35.6)
Value.....	12,463	16,925	18,029	11,370	8,408	▲44.7	▲35.8	▲6.5	▼(26.1)	▼(26.1)
Unit value.....	\$2.46	\$3.21	\$3.25	\$3.33	\$3.82	▲32.3	▲30.5	▲1.4	▲14.7	▲14.7
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***	***
<b>FWS: All import sources:</b>										
Quantity.....	426,138	406,573	473,920	342,197	325,193	▲11.2	▼(4.6)	▲16.6	▼(5.0)	▼(5.0)
Value.....	931,259	947,451	1,067,137	727,947	665,651	▲14.6	▲1.7	▲12.6	▼(8.6)	▼(8.6)
Unit value.....	\$2.19	\$2.33	\$2.25	\$2.13	\$2.05	▲3.0	▲6.6	▼(3.4)	▼(3.8)	▼(3.8)
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***	▲***
<b>Fresh non-winter strawberries: All import sources:</b>										
Quantity.....	138,264	181,973	111,471	111,208	130,767	▼(19.4)	▲31.6	▼(38.7)	▲17.6	▲17.6
Value.....	170,949	261,228	129,074	128,703	119,211	▼(24.5)	▲52.8	▼(50.6)	▼(7.4)	▼(7.4)
Unit value.....	\$1.24	\$1.44	\$1.16	\$1.16	\$0.91	▼(6.3)	▲16.1	▼(19.3)	▼(21.2)	▼(21.2)
Ending inventory quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***	▲***
<b>All fresh strawberries: All import sources:</b>										
Quantity.....	564,401	588,546	585,391	453,405	455,960	▲3.7	▲4.3	▼(0.5)	▲0.6	▲0.6
Value.....	1,102,208	1,208,680	1,196,211	856,651	784,863	▲8.5	▲9.7	▼(1.0)	▼(8.4)	▼(8.4)
Unit value.....	\$1.95	\$2.05	\$2.04	\$1.89	\$1.72	▲4.6	▲5.2	▼(0.5)	▼(8.9)	▼(8.9)
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***	▲***
<b>U.S. producers':</b>										
Production quantity.....	***	***	***	***	***	▲***	▼***	▲***	▲***	▲***
<b>U.S. shipments from within region producers (fn2):</b>										
Quantity.....	***	***	***	***	***	▲***	▼***	▲***	▲***	▲***
Value.....	***	***	***	***	***	▲***	▲***	▲***	▲***	▲***
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▼***	▼***
<b>U.S. shipments from out-of-region producers (fn2):</b>										
Quantity.....	***	***	***	***	***	▲***	▼***	▲***	▲***	▲***
Value.....	***	***	***	***	***	▲***	▲***	▲***	▲***	▲***
Unit value.....	***	***	***	***	***	▼***	▲***	▼***	▲***	▲***
<b>U.S. shipments (fn2):</b>										
Quantity.....	***	***	***	***	***	▲***	▼***	▲***	▲***	▲***
Value.....	***	***	***	***	***	▲***	▲***	▲***	▲***	▲***
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▲***	▲***

Table continued.

**Table C.4 Continued**

**All fresh strawberries: Summary data concerning the national U.S. market, by item and period**

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through September

Item	Reported data					Period change comparisons			
	Calendar year		2024	Interim		Calendar year		Interim	
	2022	2023		2024	2025	2022-24	2022-23	2023-24	2024-25
U.S. producers: Continued									
Export shipments:									
Quantity.....	***	***	***	***	***	▲***	▼***	▲***	▼***
Value.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Unit value.....	***	***	***	***	***	▼***	▲***	▼***	▲***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
Inventories/total shipments (fn1).....	***	***	***	***	***	***	***	***	***
Production workers.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Hours worked (1,000s).....	***	***	***	***	***	▲***	▲***	▼***	▲***
Wages paid (\$1,000).....	***	***	***	***	***	▲***	▲***	▲***	▲***
Hourly wages (dollars per hour).....	***	***	***	***	***	▲***	▲***	▲***	▲***
Productivity (pounds per hour).....	***	***	***	***	***	▲***	▼***	▲***	▲***
Unit labor costs.....	***	***	***	***	***	▲***	▲***	▼***	▼***
Net sales:									
Quantity.....	***	***	***	***	***	▲***	▼***	▲***	▲***
Value.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▲***
Cost of goods sold (COGS).....	***	***	***	***	***	▲***	▲***	▲***	▲***
Gross profit or (loss) (fn3).....	***	***	***	***	***	▲***	▲***	▲***	▲***
SG&A expenses.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Operating income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▲***
Net income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***
Unit COGS.....	***	***	***	***	***	▲***	▲***	▼***	▲***
Unit SG&A expenses.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Unit operating income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***
Unit net income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***
COGS/sales (fn1).....	***	***	***	***	***	▲***	▲***	▲***	▲***
Operating income or (loss)/sales (fn1).....	***	***	***	***	***	▼***	▼***	▼***	▼***
Net income or (loss)/sales (fn1).....	***	***	***	***	***	▼***	▼***	▼***	▼***
Capital expenditures.....	***	***	***	***	***	▼***	▲***	▼***	▲***
Research and development expenses.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Total assets.....	***	***	***	***	***	▲***	▲***	▲***	***

Source: Compiled from data submitted in response to Commission questionnaires and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.2010, 0810.10.2020, 0810.10.2040, 0810.10.2060, 0810.10.2080, 0810.10.2090, 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values. 508-compliant tables for these data are contained in appendix E of this report.

fn1.--Reported data are in percent and period changes are in percentage points.

fn2.--U.S. producer data is presented for the national market inclusive of all U.S. producers' of fresh strawberries. The breakout for U.S. shipments on the region the fresh strawberries were harvested is based on U.S. shipments to all regions. National apparent consumption is based on the U.S. producer total U.S. shipments regardless of region of harvest.

fn3.--Percent changes only calculated when both comparison values represent profits; The directional change in profitability provided when one or both comparison values represent a loss.

Note.--Shares and ratios shown as "0.0" percent represent non-zero values less than "0.05" percent (if positive) and greater than "(0.05)" percent (if negative). Zeroes, null values, and undefined calculations are suppressed and shown as "--". Period changes preceded by a "▲" represent an increase, while period changes preceded by a "▼" represent a decrease.

## Related party exclusion: Winter: Regional

**Table C.5**

**Fresh winter strawberries: Summary data concerning the within region U.S. market excluding U.S. producer \*\*\*, by item and period**

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through September

Item	Reported data					Period change comparisons				
	Calendar year		2024	Interim		Calendar year		Interim		
	2022	2023		2024	2025	2022-24	2022-23	2023-24	2024-25	
<b>Within region U.S. consumption quantity:</b>										
Amount.....	***	***	***	***	***	▲***	▼***	▲***	▼***	
Producers' share (fn1):										
Included within region producers.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Included out-of-region producers.....	***	***	***	***	***	▲***	▲***	▼***	▲***	
Included U.S. producers.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Excluded U.S. producers.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
U.S. producers total.....	***	***	***	***	***	▲***	▲***	▼***	▲***	
Importers' share (fn1):										
Mexico.....	***	***	***	***	***	▼***	▼***	▲***	▼***	
Nonsubject sources.....	***	***	***	***	***	▼***	▲***	▼***	▼***	
All import sources.....	***	***	***	***	***	▼***	▼***	▲***	▼***	
<b>Within region U.S. consumption value:</b>										
Amount.....	***	***	***	***	***	▲***	▼***	▲***	▼***	
Producers' share (fn1):										
Included within region producers.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Included out-of-region producers.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Included U.S. producers.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Excluded U.S. producers.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
U.S. producers total.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Importers' share (fn1):										
Mexico.....	***	***	***	***	***	▲***	▼***	▲***	▼***	
Nonsubject sources.....	***	***	***	***	***	▲***	▲***	▼***	▼***	
All import sources.....	***	***	***	***	***	▲***	▼***	▲***	▼***	
<b>U.S. imports from:</b>										
Mexico:										
Quantity.....	285,700	246,705	334,591	211,106	195,809	▲17.1	▼(13.6)	▲35.6	▼(7.2)	
Value.....	623,419	572,061	749,448	446,523	398,444	▲20.2	▼(8.2)	▲31.0	▼(10.8)	
Unit value.....	\$2.18	\$2.32	\$2.24	\$2.12	\$2.03	▲2.6	▲6.3	▼(3.4)	▼(3.8)	
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
Nonsubject sources:										
Quantity.....	4,197	4,241	4,837	2,849	1,903	▲15.3	▲1.0	▲14.1	▼(33.2)	
Value.....	10,312	13,599	15,728	9,485	7,269	▲52.5	▲31.9	▲15.7	▼(23.4)	
Unit value.....	\$2.46	\$3.21	\$3.25	\$3.33	\$3.82	▲32.3	▲30.5	▲1.4	▲14.7	
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***	
All import sources:										
Quantity.....	289,897	250,945	339,429	213,956	197,712	▲17.1	▼(13.4)	▲35.3	▼(7.6)	
Value.....	633,731	585,660	765,177	456,009	405,713	▲20.7	▼(7.6)	▲30.7	▼(11.0)	
Unit value.....	\$2.19	\$2.33	\$2.25	\$2.13	\$2.05	▲3.1	▲6.8	▼(3.4)	▼(3.7)	
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
<b>Included within region U.S. producers':</b>										
Production quantity.....										
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
U.S. shipments (fn2):										
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
Value.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▼***	
U.S. shipments from out-of-region producers (fn2):										
Quantity.....	***	***	***	***	***	▲***	▲***	▼***	▲***	
Value.....	***	***	***	***	***	▲***	▲***	▼***	▲***	
Unit value.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
U.S. shipments including out-of-region producers (fn2):										
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
Value.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▼***	

Table continued.

**Table C.5 Continued**

**Fresh winter strawberries: Summary data concerning the within region U.S. market excluding U.S. producer \*\*\*, by item and period**

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through September

Item	Reported data					Period change comparisons				
	Calendar year		2024	Interim		Calendar year		Interim		
	2022	2023		2024	2025	2022-24	2022-23	2023-24	2024-25	
Included within region U.S. producers': Continued										
Export shipments:										
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***	▲***
Value.....	***	***	***	***	***	▼***	▲***	▼***	▲***	▲***
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▼***	▼***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***	***
Inventories/total shipments (fn1).....	***	***	***	***	***	***	***	***	***	***
Production workers.....	***	***	***	***	***	▲***	▲***	▲***	▼***	▼***
Hours worked (1,000s).....	***	***	***	***	***	▲***	▲***	▼***	▲***	▲***
Wages paid (\$1,000).....	***	***	***	***	***	▲***	▲***	▼***	▲***	▲***
Hourly wages (dollars per hour).....	***	***	***	***	***	▲***	▲***	▲***	▲***	▲***
Productivity (pounds per hour).....	***	***	***	***	***	▼***	▼***	▲***	▲***	▲***
Unit labor costs.....	***	***	***	***	***	▼***	▼***	▼***	▼***	▼***
Net sales:										
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***	▲***
Value.....	***	***	***	***	***	▼***	▲***	▼***	▲***	▲***
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▲***	▲***
Cost of goods sold (COGS).....	***	***	***	***	***	▲***	▲***	▼***	▲***	▲***
Gross profit or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	▼***
SG&A expenses.....	***	***	***	***	***	▲***	▲***	▲***	▼***	▼***
Operating income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	▼***
Net income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	▼***
Unit COGS.....	***	***	***	***	***	▲***	▲***	▲***	▲***	▲***
Unit SG&A expenses.....	***	***	***	***	***	▲***	▲***	▲***	▼***	▼***
Unit operating income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	▼***
Unit net income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	▼***
COGS/sales (fn1).....	***	***	***	***	***	▲***	▲***	▲***	▲***	▲***
Operating income or (loss)/sales (fn1).....	***	***	***	***	***	▼***	▼***	▼***	▼***	▼***
Net income or (loss)/sales (fn1).....	***	***	***	***	***	▼***	▼***	▼***	▼***	▼***
Capital expenditures.....	***	***	***	***	***	▼***	▲***	▼***	▼***	▼***
Research and development expenses.....	***	***	***	***	***	***	***	***	***	***
Total assets.....	***	***	***	***	***	▲***	▲***	▲***	***	***

Source: Compiled from data submitted in response to Commission questionnaires and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, limited to October through March and adjusted to report only within region imports by source using the experience of respondents to the Commission's U.S. importer questionnaire. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values. 508-compliant tables for these data are available upon

fn1.--Reported data are in percent and period changes are in percentage points.

fn2.--All U.S. producer data except for U.S. shipments is presented for within region U.S. producers' based on the region the fresh winter strawberries were harvested. U.S. shipments for purposes of within region apparent consumption includes breakouts for both the within region U.S. producers and out-of-region U.S. producers' shipments.

fn3.--Percent changes only calculated when both comparison values represent profits; The directional change in profitability provided when one or both comparison values represent a loss.

Note.--Shares and ratios shown as "0.0" percent represent non-zero values less than "0.05" percent (if positive) and greater than "(0.05)" percent (if negative). Zeroes, null values, and undefined calculations are suppressed and shown as "--". Period changes preceded by a "▲" represent an increase, while period changes preceded by a "▼" represent a decrease.

## Related party exclusion: Winter: National

**Table C.6**

**Fresh winter strawberries: Summary data concerning the national U.S. market excluding U.S. producer \*\*\*, by item and period**

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through September

Item	Reported data					Period change comparisons				
	Calendar year		2024	Interim		Calendar year		Interim		
	2022	2023		2024	2025	2022-24	2022-23	2023-24	2024-25	
<b>National U.S. consumption quantity:</b>										
Amount.....	***	***	***	***	***	▲***	▼***	▲***	▼***	
<b>Producers' share (fn1):</b>										
Included within region producers.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
Included out-of-region producers.....	***	***	***	***	***	▲***	▲***	▲***	▼***	
Included U.S. producers.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
Excluded U.S. producers.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
U.S. producers total.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
<b>Importers' share (fn1):</b>										
Mexico.....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Nonsubject sources.....	***	***	***	***	***	▼***	▲***	▼***	▼***	
All import sources.....	***	***	***	***	***	▼***	▼***	▼***	▼***	
<b>National U.S. consumption value:</b>										
Amount.....	***	***	***	***	***	▲***	▲***	▲***	▼***	
<b>Producers' share (fn1):</b>										
Included within region producers.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
Included out-of-region producers.....	***	***	***	***	***	▲***	▲***	▲***	▼***	
Included U.S. producers.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
Excluded U.S. producers.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
U.S. producers total.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
<b>Importers' share (fn1):</b>										
Mexico.....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Nonsubject sources.....	***	***	***	***	***	▲***	▲***	▼***	▼***	
All import sources.....	***	***	***	***	***	▼***	▼***	▼***	▼***	
<b>U.S. imports from:</b>										
<b>Mexico:</b>										
Quantity.....	421,065	401,295	468,374	338,781	322,992	▲11.2	▼(4.7)	▲16.7	▼(4.7)	
Value.....	918,796	930,527	1,049,108	716,577	657,243	▲14.2	▲1.3	▲12.7	▼(8.3)	
Unit value.....	\$2.18	\$2.32	\$2.24	\$2.12	\$2.03	▲2.6	▲6.3	▼(3.4)	▼(3.8)	
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
<b>Nonsubject sources:</b>										
Quantity.....	5,072	5,278	5,545	3,416	2,201	▲9.3	▲4.1	▲5.1	▼(35.6)	
Value.....	12,463	16,925	18,029	11,370	8,408	▲44.7	▲35.8	▲6.5	▼(26.1)	
Unit value.....	\$2.46	\$3.21	\$3.25	\$3.33	\$3.82	▲32.3	▲30.5	▲1.4	▲14.7	
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***	
<b>All import sources:</b>										
Quantity.....	426,138	406,573	473,920	342,197	325,193	▲11.2	▼(4.6)	▲16.6	▼(5.0)	
Value.....	931,259	947,451	1,067,137	727,947	665,651	▲14.6	▲1.7	▲12.6	▼(8.6)	
Unit value.....	\$2.19	\$2.33	\$2.25	\$2.13	\$2.05	▲3.0	▲6.6	▼(3.4)	▼(3.8)	
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
<b>Included U.S. producers':</b>										
<b>Production quantity.....</b>										
U.S. shipments from within region producers (fn2):	***	***	***	***	***	▲***	▼***	▲***	▲***	
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
Value.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▼***	
U.S. shipments from out-of-region region producers (fn2):	***	***	***	***	***	▲***	▲***	▲***	▼***	
Quantity.....	***	***	***	***	***	▲***	▲***	▲***	▼***	
Value.....	***	***	***	***	***	▲***	▲***	▲***	▼***	
Unit value.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
<b>U.S. shipments (fn2):</b>										
Quantity.....	***	***	***	***	***	▲***	▼***	▲***	▲***	
Value.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▲***	

Table continued.

**Table C.6 Continued**

**Fresh winter strawberries: Summary data concerning the national U.S. market excluding U.S. producer \*\*\*, by item and period**

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through September

Item	Reported data					Period change comparisons				
	Calendar year		2024	Interim		Calendar year		Interim		
	2022	2023		2024	2025	2022-24	2022-23	2023-24	2024-25	
Included U.S. producers': Continued										
Export shipments:										
Quantity.....	***	***	***	***	***	▼***	▲***	▼***	▲***	▲***
Value.....	***	***	***	***	***	▼***	▲***	▼***	▲***	▲***
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▼***	▼***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***	***
Inventories/total shipments (fn1).....	***	***	***	***	***	***	***	***	***	***
Production workers.....	***	***	***	***	***	▲***	▲***	▲***	▼***	▼***
Hours worked (1,000s).....	***	***	***	***	***	▲***	▲***	▼***	▲***	▲***
Wages paid (\$1,000).....	***	***	***	***	***	▲***	▲***	▼***	▼***	▲***
Hourly wages (dollars per hour).....	***	***	***	***	***	▲***	▲***	▲***	▲***	▲***
Productivity (pounds per hour).....	***	***	***	***	***	▼***	▼***	▲***	▲***	▲***
Unit labor costs.....	***	***	***	***	***	▲***	▲***	▼***	▼***	▲***
Net sales:										
Quantity.....	***	***	***	***	***	▲***	▼***	▲***	▲***	▲***
Value.....	***	***	***	***	***	▲***	▲***	▲***	▲***	▲***
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▲***	▲***
Cost of goods sold (COGS).....	***	***	***	***	***	▲***	▲***	▲***	▲***	▲***
Gross profit or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	▼***
SG&A expenses.....	***	***	***	***	***	▲***	▲***	▲***	▼***	▼***
Operating income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	▼***
Net income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	▼***
Unit COGS.....	***	***	***	***	***	▲***	▲***	▼***	▲***	▲***
Unit SG&A expenses.....	***	***	***	***	***	▲***	▲***	▲***	▼***	▼***
Unit operating income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	▼***
Unit net income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	▼***
COGS/sales (fn1).....	***	***	***	***	***	▲***	▲***	▲***	▲***	▲***
Operating income or (loss)/sales (fn1).....	***	***	***	***	***	▼***	▼***	▼***	▼***	▼***
Net income or (loss)/sales (fn1).....	***	***	***	***	***	▼***	▼***	▼***	▼***	▼***
Capital expenditures.....	***	***	***	***	***	▼***	▲***	▼***	▲***	▲***
Research and development expenses.....	***	***	***	***	***	▲***	▲***	▲***	▼***	▼***
Total assets.....	***	***	***	***	***	▲***	▲***	▼***	▼***	▼***

Source: Compiled from data submitted in response to Commission questionnaires and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, limited to October through March. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values. 508-compliant tables for these data are available upon request.

fn1.--Reported data are in percent and period changes are in percentage points.

fn2.--U.S. producer data is presented for the national market inclusive of all U.S. producers' of fresh winter strawberries. The breakout for U.S. shipments on the region the fresh winter strawberries were harvested is based on U.S. shipments to all regions. National apparent consumption is based on the U.S. producer total U.S. shipments regardless of region of harvest.

fn3.--Percent changes only calculated when both comparison values represent profits; The directional change in profitability provided when one or both comparison values represent a loss.

Note.--Shares and ratios shown as "0.0" percent represent non-zero values less than "0.05" percent (if positive) and greater than "(0.05)" percent (if negative). Zeros, null values, and undefined calculations are suppressed and shown as "--". Period changes preceded by a "▲" represent an increase, while period changes preceded by a "▼" represent a decrease.

## Related party exclusion: Year Round: Regional

**Table C.7**

**All fresh strawberries: Summary data concerning the within region U.S. market excluding U.S. producer \*\*\*, by item and period**

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through September

Item	Reported data					Period change comparisons				
	Calendar year		Interim			Calendar year		Interim		
	2022	2023	2024	2024	2025	2022-24	2022-23	2023-24	2024-25	
<b>Within region U.S. consumption quantity:</b>										
Amount.....	***	***	***	***	***	▲***	▼***	▲***	▲***	
<b>Producers' share (fn1):</b>										
Included within region producers.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Included out-of-region producers.....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Included U.S. producers.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Excluded U.S. producers.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
U.S. producers total.....	***	***	***	***	***	▲***	▲***	▼***	▲***	
<b>Importers' share (fn1):</b>										
FWS: Mexico.....	***	***	***	***	***	▲***	▼***	▲***	▼***	
FWS: Nonsubject sources.....	***	***	***	***	***	▼***	▲***	▼***	▼***	
FWS: All import sources.....	***	***	***	***	***	▲***	▼***	▲***	▼***	
Non-winter: All import sources.....	***	***	***	***	***	▼***	▲***	▼***	▼***	
All fresh strawberries.....	***	***	***	***	***	▼***	▼***	▲***	▼***	
<b>Within region U.S. consumption value:</b>										
Amount.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
<b>Producers' share (fn1):</b>										
Included within region producers.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Included out-of-region producers.....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Included U.S. producers.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Excluded U.S. producers.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
U.S. producers total.....	***	***	***	***	***	▲***	▲***	▼***	▲***	
<b>Importers' share (fn1):</b>										
FWS: Mexico.....	***	***	***	***	***	▲***	▼***	▲***	▼***	
FWS: Nonsubject sources.....	***	***	***	***	***	▲***	▲***	▼***	▼***	
FWS: All import sources.....	***	***	***	***	***	▲***	▼***	▲***	▼***	
Non-winter: All import sources.....	***	***	***	***	***	▼***	▲***	▼***	▼***	
All fresh strawberries.....	***	***	***	***	***	▼***	▼***	▲***	▼***	
<b>U.S. imports from:</b>										
<b>FWS: Mexico:</b>										
Quantity.....	285,700	246,705	334,591	211,106	195,809	▲17.1	▼(13.6)	▲35.6	▼(7.2)	
Value.....	623,419	572,061	749,448	446,523	398,444	▲20.2	▼(8.2)	▲31.0	▼(10.8)	
Unit value.....	\$2.18	\$2.32	\$2.24	\$2.12	\$2.03	▲2.6	▲6.3	▼(3.4)	▼(3.8)	
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
<b>FWS: Nonsubject sources:</b>										
Quantity.....	4,197	4,241	4,837	2,849	1,903	▲15.3	▲1.0	▲14.1	▼(33.2)	
Value.....	10,312	13,599	15,728	9,485	7,269	▲52.5	▲31.9	▲15.7	▼(23.4)	
Unit value.....	\$2.46	\$3.21	\$3.25	\$3.33	\$3.82	▲32.3	▲30.5	▲1.4	▲14.7	
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***	
<b>FWS: All import sources:</b>										
Quantity.....	289,897	250,945	339,429	213,956	197,712	▲17.1	▼(13.4)	▲35.3	▼(7.6)	
Value.....	633,731	585,660	765,177	456,009	405,713	▲20.7	▼(7.6)	▲30.7	▼(11.0)	
Unit value.....	\$2.19	\$2.33	\$2.25	\$2.13	\$2.05	▲3.1	▲6.8	▼(3.4)	▼(3.7)	
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
<b>Fresh non-winter strawberries: All import sources:</b>										
Quantity.....	30,579	31,221	27,164	27,553	14,883	▼(11.2)	▲2.1	▼(13.0)	▼(46.0)	
Value.....	40,590	48,566	36,931	37,272	18,424	▼(9.0)	▲19.7	▼(24.0)	▼(50.6)	
Unit value.....	\$1.33	\$1.56	\$1.36	\$1.35	\$1.24	▲2.4	▲17.2	▼(12.6)	▼(8.5)	
Ending inventory quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
<b>All fresh strawberries: All import sources:</b>										
Quantity.....	320,476	282,166	366,593	241,508	212,595	▲14.4	▼(12.0)	▲29.9	▼(12.0)	
Value.....	674,321	634,226	802,108	493,280	424,138	▲19.0	▼(5.9)	▲26.5	▼(14.0)	
Unit value.....	\$2.10	\$2.25	\$2.19	\$2.04	\$2.00	▲4.0	▲6.8	▼(2.7)	▼(2.3)	
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***	

Table continued.

**Table C.7 Continued**

**All fresh strawberries: Summary data concerning the within region U.S. market excluding U.S. producer \*\*\*, by item and period**

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through September

Item	Reported data					Period change comparisons				
	Calendar year		Interim			Calendar year		Interim		
	2022	2023	2024	2024	2025	2022-24	2022-23	2023-24	2024-25	
Included within region U.S. producers':										
Production quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
U.S. shipments (fn2):										
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
Value.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Unit value.....	***	***	***	***	***	▲***	▲***	▲***	▼***	
U.S. shipments from out-of-region producers (fn2):										
Quantity.....	***	***	***	***	***	▲***	▼***	▲***	▼***	
Value.....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Unit value.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
U.S. shipments including out-of-region producers (fn2):										
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
Value.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▼***	
Export shipments:										
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
Value.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▲***	
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***	
Inventories/total shipments (fn1).....	***	***	***	***	***	***	***	***	***	
Production workers.....	***	***	***	***	***	▲***	▲***	▲***	▼***	
Hours worked (1,000s).....	***	***	***	***	***	▲***	▲***	▲***	▲***	
Wages paid (\$1,000).....	***	***	***	***	***	▲***	▲***	▼***	▲***	
Hourly wages (dollars per hour).....	***	***	***	***	***	▲***	▲***	▲***	▲***	
Productivity (pounds per hour).....	***	***	***	***	***	▼***	▼***	▲***	▲***	
Unit labor costs.....	***	***	***	***	***	▲***	▲***	▼***	▼***	
Net sales:										
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
Value.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
Unit value.....	***	***	***	***	***	▲***	▲***	▲***	▼***	
Cost of goods sold (COGS).....	***	***	***	***	***	▲***	▲***	▲***	▲***	
Gross profit or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	
SG&A expenses.....	***	***	***	***	***	▲***	▲***	▲***	▼***	
Operating income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Net income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Unit COGS.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
Unit SG&A expenses.....	***	***	***	***	***	▲***	▲***	▲***	▼***	
Unit operating income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Unit net income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***	
COGS/sales (fn1).....	***	***	***	***	***	▲***	▲***	▲***	▲***	
Operating income or (loss)/sales (fn1).....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Net income or (loss)/sales (fn1).....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Capital expenditures.....	***	***	***	***	***	▼***	▲***	▼***	▼***	
Research and development expenses.....	***	***	***	***	***	***	***	***	***	
Total assets.....	***	***	***	***	***	▲***	▲***	▲***	***	

Source: Compiled from data submitted in response to Commission questionnaires and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.2010, 0810.10.2020, 0810.10.2040, 0810.10.2060, 0810.10.2080, 0810.10.2090, 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026 adjusted to report only within region imports by source using the experience of respondents to the Commission's U.S. importer questionnaire. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values. 508-compliant tables for these data are available upon request.

fn1.--Reported data are in percent and period changes are in percentage points.

fn2.--All U.S. producer data except for U.S. shipments is presented for within region U.S. producers' based on the region the fresh strawberries were harvested. U.S. shipments for purposes of within region apparent consumption includes breakouts for both the within region U.S. producers and out-of-region U.S. producers' shipments.

fn3.--Percent changes only calculated when both comparison values represent profits; The directional change in profitability provided when one or both comparison values represent a loss.

Note.--Shares and ratios shown as "0.0" percent represent non-zero values less than "0.05" percent (if positive) and greater than "(0.05)" percent (if negative). Zeros, null values, and undefined calculations are suppressed and shown as "-". Period changes preceded by a "▲" represent an increase, while period changes preceded by a "▼" represent a decrease.

## Related party exclusion: Year Round: National

**Table C.8**

**All fresh strawberries: Summary data concerning the national U.S. market excluding U.S. producer \*\*\*, by item and period**

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through September

Item	Reported data					Period change comparisons				
	Calendar year		Interim			Calendar year		Interim		
	2022	2023	2024	2024	2025	2022-24	2022-23	2023-24	2024-25	
<b>National U.S. consumption quantity:</b>										
Amount.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
<b>Producers' share (fn1):</b>										
Included within region producers.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
Included out-of-region producers.....	***	***	***	***	***	▲***	▲***	▲***	▼***	
Included U.S. producers.....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Excluded U.S. producers.....	***	***	***	***	***	▲***	▼***	▲***	▲***	
U.S. producers total.....	***	***	***	***	***	▲***	▼***	▲***	▲***	
<b>Importers' share (fn1):</b>										
FWS: Mexico.....	***	***	***	***	***	▼***	▼***	▲***	▼***	
FWS: Nonsubject sources.....	***	***	***	***	***	▼***	▲***	▼***	▼***	
FWS: All import sources.....	***	***	***	***	***	▼***	▼***	▲***	▼***	
Non-winter: All import sources.....	***	***	***	***	***	▼***	▲***	▼***	▲***	
All fresh strawberries.....	***	***	***	***	***	▼***	▲***	▼***	▼***	
<b>National U.S. consumption value:</b>										
Amount.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
<b>Producers' share (fn1):</b>										
Included within region producers.....	***	***	***	***	***	▼***	▼***	▼***	▼***	
Included out-of-region producers.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
Included U.S. producers.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
Excluded U.S. producers.....	***	***	***	***	***	▲***	▼***	▲***	▲***	
U.S. producers total.....	***	***	***	***	***	▲***	▼***	▲***	▲***	
<b>Importers' share (fn1):</b>										
FWS: Mexico.....	***	***	***	***	***	▼***	▼***	▲***	▼***	
FWS: Nonsubject sources.....	***	***	***	***	***	▲***	▲***	▼***	▼***	
FWS: All import sources.....	***	***	***	***	***	▼***	▼***	▲***	▼***	
Non-winter: All import sources.....	***	***	***	***	***	▼***	▲***	▼***	▼***	
All fresh strawberries.....	***	***	***	***	***	▼***	▲***	▼***	▼***	
<b>U.S. imports from:</b>										
<b>FWS: Mexico:</b>										
Quantity.....	421,065	401,295	468,374	338,781	322,992	▲11.2	▼(4.7)	▲16.7	▼(4.7)	
Value.....	918,796	930,527	1,049,108	716,577	657,243	▲14.2	▲1.3	▲12.7	▼(8.3)	
Unit value.....	\$2.18	\$2.32	\$2.24	\$2.12	\$2.03	▲2.6	▲6.3	▼(3.4)	▼(3.8)	
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
<b>FWS: Nonsubject sources:</b>										
Quantity.....	5,072	5,278	5,545	3,416	2,201	▲9.3	▲4.1	▲5.1	▼(35.6)	
Value.....	12,463	16,925	18,029	11,370	8,408	▲44.7	▲35.8	▲6.5	▼(26.1)	
Unit value.....	\$2.46	\$3.21	\$3.25	\$3.33	\$3.82	▲32.3	▲30.5	▲1.4	▲14.7	
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***	
<b>FWS: All import sources:</b>										
Quantity.....	426,138	406,573	473,920	342,197	325,193	▲11.2	▼(4.6)	▲16.6	▼(5.0)	
Value.....	931,259	947,451	1,067,137	727,947	665,651	▲14.6	▲1.7	▲12.6	▼(8.6)	
Unit value.....	\$2.19	\$2.33	\$2.25	\$2.13	\$2.05	▲3.0	▲6.6	▼(3.4)	▼(3.8)	
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***	
<b>Fresh non-winter strawberries: All import sources:</b>										
Quantity.....	138,264	181,973	111,471	111,208	130,767	▼(19.4)	▲31.6	▼(38.7)	▲17.6	
Value.....	170,949	261,228	129,074	128,703	119,211	▼(24.5)	▲52.8	▼(50.6)	▼(7.4)	
Unit value.....	\$1.24	\$1.44	\$1.16	\$1.16	\$0.91	▼(6.3)	▲16.1	▼(19.3)	▼(21.2)	
Ending inventory quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***	
<b>All fresh strawberries: All import sources:</b>										
Quantity.....	564,401	588,546	585,391	453,405	455,960	▲3.7	▲4.3	▼(0.5)	▲0.6	
Value.....	1,102,208	1,208,680	1,196,211	856,651	784,863	▲8.5	▲9.7	▼(1.0)	▼(8.4)	
Unit value.....	\$1.95	\$2.05	\$2.04	\$1.89	\$1.72	▲4.6	▲5.2	▼(0.5)	▼(8.9)	
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***	

Table continued.

**Table C.8 Continued**

**All fresh strawberries: Summary data concerning the national U.S. market excluding U.S. producer \*\*\*, by item and period**

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through September

Item	Reported data					Period change comparisons			
	Calendar year			Interim		Calendar year			Interim
	2022	2023	2024	2024	2025	2022-24	2022-23	2023-24	2024-25
Included U.S. producers':									
Production quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***
U.S. shipments from within region producers (fn2):									
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***
Value.....	***	***	***	***	***	▲***	▲***	▼***	▲***
Unit value.....	***	***	***	***	***	▲***	▲***	▲***	▼***
U.S. shipments from out-of-region region producers (fn2):									
Quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Value.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Unit value.....	***	***	***	***	***	▼***	▲***	▼***	▲***
U.S. shipments (fn2):									
Quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Value.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Unit value.....	***	***	***	***	***	▼***	▲***	▼***	▲***
Export shipments:									
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***
Value.....	***	***	***	***	***	▼***	▼***	▼***	▲***
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▲***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
Inventories/total shipments (fn1).....	***	***	***	***	***	***	***	***	***
Production workers.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Hours worked (1,000s).....	***	***	***	***	***	▲***	▲***	▲***	▲***
Wages paid (\$1,000).....	***	***	***	***	***	▲***	▲***	▲***	▲***
Hourly wages (dollars per hour).....	***	***	***	***	***	▲***	▲***	▲***	▲***
Productivity (pounds per hour).....	***	***	***	***	***	▲***	▼***	▲***	▲***
Unit labor costs.....	***	***	***	***	***	▲***	▲***	▼***	▼***
Net sales:									
Quantity.....	***	***	***	***	***	▲***	▼***	▲***	▲***
Value.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Unit value.....	***	***	***	***	***	▼***	▲***	▼***	▲***
Cost of goods sold (COGS).....	***	***	***	***	***	▲***	▲***	▲***	▲***
Gross profit or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***
SG&A expenses.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Operating income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***
Net income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***
Unit COGS.....	***	***	***	***	***	▲***	▲***	▼***	▲***
Unit SG&A expenses.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Unit operating income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***
Unit net income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***
COGS/sales (fn1).....	***	***	***	***	***	▲***	▲***	▲***	▲***
Operating income or (loss)/sales (fn1).....	***	***	***	***	***	▼***	▼***	▼***	▼***
Net income or (loss)/sales (fn1).....	***	***	***	***	***	▼***	▼***	▼***	▼***
Capital expenditures.....	***	***	***	***	***	▼***	▲***	▼***	▲***
Research and development expenses.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Total assets.....	***	***	***	***	***	▲***	▲***	▲***	***

Source: Compiled from data submitted in response to Commission questionnaires and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.2010, 0810.10.2020, 0810.10.2040, 0810.10.2060, 0810.10.2080, 0810.10.2090, 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values. 508-compliant tables for these data are available upon request.

fn1.--Reported data are in percent and period changes are in percentage points.  
 fn2.--U.S. producer data is presented for the national market inclusive of all U.S. producers' of fresh strawberries. The breakout for U.S. shipments on the region the fresh strawberries were harvested is based on U.S. shipments to all regions. National apparent consumption is based on the U.S. producer total U.S. shipments regardless of region of harvest.  
 fn3.--Percent changes only calculated when both comparison values represent profits; The directional change in profitability provided when one or both comparison values represent a loss.

Note.--Shares and ratios shown as "0.0" percent represent non-zero values less than "0.05" percent (if positive) and greater than "(0.05)" percent (if negative). Zeroes, null values, and undefined calculations are suppressed and shown as "--". Period changes preceded by a "▲" represent an increase, while period changes preceded by a "▼" represent a decrease.

**APPENDIX D**

**DOMESTIC LIKE PRODUCT NARRATIVES**



**Table D.1 All fresh strawberries: U.S. producers' narrative responses regarding the comparability of fresh winter strawberries to all other (non-winter) fresh strawberries, by domestic like product factor**

Factor	Producer name and narrative response on comparability
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***

Factor	Producer name and narrative response on comparability
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***

Factor	Producer name and narrative response on comparability
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***

Factor	Producer name and narrative response on comparability
Channels	***
Channels	***
Channels	***
Channels	***
Channels	***
Channels	***
Channels	***
Channels	***
Channels	***
Channels	***
Channels	***
Channels	***
Channels	***
Channels	***
Channels	***
Channels	***
Channels	***
Channels	***
Channels	***
Channels	***

Factor	Producer name and narrative response on comparability
Channels	***
Channels	***
Channels	***
Channels	***
Manufacturing	***
Manufacturing	***
Manufacturing	***
Manufacturing	***
Manufacturing	***
Manufacturing	***
Manufacturing	***
Manufacturing	***
Manufacturing	***
Manufacturing	***
Manufacturing	***
Manufacturing	***
Manufacturing	***
Manufacturing	***
Manufacturing	***

Factor	Producer name and narrative response on comparability
Manufacturing	***
Manufacturing	***
Manufacturing	***
Manufacturing	***
Manufacturing	***
Manufacturing	***
Manufacturing	***
Manufacturing	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***

Factor	Producer name and narrative response on comparability
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Price	***
Price	***
Price	***
Price	***
Price	***
Price	***
Price	***

Factor	Producer name and narrative response on comparability
Price	***
Price	***
Price	***
Price	***
Price	***
Price	***
Price	***
Price	***
Price	***
Price	***
Price	***
Price	***
Price	***
Price	***
Price	***
Price	***
Price	***
Price	***

Source: Compiled from data submitted in response to Commission questionnaires.

**Table D.2 All fresh strawberries: U.S. importers' narrative responses regarding the comparability of fresh winter strawberries to all other (non-winter) fresh strawberries, by domestic like product factor**

<b>Factor</b>	<b>Importer name and narrative response on comparability</b>
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Physical characteristics	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Interchangeability	***
Channels	***
Channels	***
Channels	***
Channels	***
Channels	***
Channels	***
Channels	***
Channels	***
Manufacturing	***

Factor	Importer name and narrative response on comparability
Manufacturing	***
Manufacturing	***
Manufacturing	***
Manufacturing	***
Manufacturing	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Perceptions	***
Price	***
Price	***
Price	***
Price	***
Price	***
Price	***
Price	***
Price	***

Source: Compiled from data submitted in response to Commission questionnaires.

**APPENDIX E**

**EXPANDED LIKE PRODUCT: ALL FRESH STRAWBERRIES**



**Table E.1 All fresh strawberries: U.S. producers, location of production, and share of reported production, 2024**

Shares in percent

<b>Firm</b>	<b>Production location(s)</b>	<b>Regional: Share of production</b>	<b>National: Share of production</b>
Arias	Ventura, CA Oxnard, CA	***	***
Astin	Plant City, FL Wimauma, FL	***	***
Aurora	Ventura, CA Oxnard, CA	***	***
BBI	Dover, FL	***	***
Berry Patches	Dover, FL	***	***
Bibian	Ventura, CA Oxnard, CA	***	***
Driscoll's CA	Watsonville, CA	***	***
Driscoll's FL	Tampa, FL	***	***
El Camino	Salinas, CA	***	***
Farm N 4 U	Plant City, FL	***	***
Florida Pacific	Dover, FL Plant City, FL	***	***
G&F and Franberry	Plant City FL	***	***
Green Empire	Oneida, NY	***	***
Grimes	Plant City, FL Kathleen, FL Ft. Meade, FL	***	***
Guayabito	Ventura, CA Oxnard, CA	***	***
J&E Berry	Ventura, CA Oxnard, CA	***	***
JAL Berry	Salinas, CA Moss Landing, CA Watsonville, CA	***	***
La Joya	Oxnard, CA	***	***
Laguna	Ventura, CA Oxnard, CA Moorpark, CA	***	***
Mathis	Plant City, FL	***	***
Moderna	Oxnard, CA	***	***
Nature Fresh	Delta, OH	***	***
Ohio Greenhouse	Wapakoneta, OH	***	***

Table continued.

**Table E.1 (Continued) All fresh strawberries: U.S. producers, location of production, and share of reported production, 2024**

Shares in percent

<b>Firm</b>	<b>Production location(s)</b>	<b>Regional: Share of production</b>	<b>National: Share of production</b>
Parkesdale	Dover, FL	***	***
Premier Berry	Oxnard, CA	***	***
Reiter Berry	Watsonville, CA	***	***
Reiter Bros.	Ventura, CA Camarillo, CA Carpinteria, CA Oxnard, CA	***	***
Reiter Pacific	Santa Maria, CA	***	***
River Valley	Salinas, CA Watsonville, CA	***	***
San Antonio	Oxnard, CA	***	***
Seaboard	Wimauma, FL	***	***
Sierra	Moss Landing, CA Oxnard, CA Nipomo, CA	***	***
Simmons	Plant City, FL Dover, FL	***	***
Sizemore	Plant City, FL	***	***
Sweet Life	Plant City, FL	***	***
Total Ag Care	Mount Dora, FL Eustis, FL Williston, FL	***	***
Ultra Farms	Wimauma, FL	***	***
Valle El Paraiso	Santa Maria, CA	***	***
Wish Farms	Duette, FL	***	***
All firms	Various	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

**Table E.2 All fresh strawberries: U.S. producers' capacity, production and capacity utilization, by period**

Quantity in 1,000 pounds; Share in percent; Interim period is January through September

Item	Measure	2022	2023	2024	Interim 2024	Interim 2025
U.S. producers: Located within region	Quantity	***	***	***	***	***
U.S. producers: Located out-of-region	Quantity	***	***	***	***	***
U.S. producers: Located throughout U.S.	Quantity	***	***	***	***	***
U.S. producers: Located within region	Share	***	***	***	***	***
U.S. producers: Located out-of-region	Share	***	***	***	***	***
U.S. producers: Located throughout U.S.	Share	100.0	100.0	100.0	100.0	100.0

Source: Compiled from official agricultural statistics of the U.S. Department of Agriculture, National Agricultural Statistical Service (NASS), accessed January 13, 2026. Note that data above are for all strawberries regardless of harvest month and whether for processing or the fresh market.

**Figure E.1 All fresh strawberries: U.S. producers' production, by region located and period**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires.

**Table E.3 All fresh strawberries: Within region U.S. producers' total shipments, by destination and period**

Quantity in 1,000 pounds; Value in 1,000 dollars; Unit values in dollars per pound; Shares in percent; Interim period is January through September

Shipment type / Destination	Measure	2022	2023	2024	Interim 2024	Interim 2025
U.S. shipments: Within region	Quantity	***	***	***	***	***
U.S. shipments: Out-of-region	Quantity	***	***	***	***	***
U.S. shipments: All regions	Quantity	***	***	***	***	***
Export shipments	Quantity	***	***	***	***	***
Total shipments	Quantity	***	***	***	***	***
U.S. shipments: Within region	Value	***	***	***	***	***
U.S. shipments: Out-of-region	Value	***	***	***	***	***
U.S. shipments: All regions	Value	***	***	***	***	***
Export shipments	Value	***	***	***	***	***
Total shipments	Value	***	***	***	***	***
U.S. shipments: Within region	Unit value	***	***	***	***	***
U.S. shipments: Out-of-region	Unit value	***	***	***	***	***
U.S. shipments: All regions	Unit value	***	***	***	***	***
Export shipments	Unit value	***	***	***	***	***
Total shipments	Unit value	***	***	***	***	***
U.S. shipments: Within region	Share 1	***	***	***	***	***
U.S. shipments: Out-of-region	Share 1	***	***	***	***	***
U.S. shipments: All regions	Share 1	100.0	100.0	100.0	100.0	100.0
U.S. shipments: Within region	Share 2	***	***	***	***	***
U.S. shipments: Out-of-region	Share 2	***	***	***	***	***
U.S. shipments: All regions	Share 2	***	***	***	***	***
Export shipments	Share 2	***	***	***	***	***
Total shipments	Share 2	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Share 1 is the share of U.S. shipments quantity. Share 2 is the share of total shipments quantity.

**Table E.4 All fresh strawberries: National U.S. producers' total shipments, by destination and period**

Quantity in 1,000 pounds; Value in 1,000 dollars; Unit values in dollars per pound; Shares in percent; Interim period is January through September

Shipment type / Destination	Measure	2022	2023	2024	Interim 2024	Interim 2025
U.S. shipments: Within region	Quantity	***	***	***	***	***
U.S. shipments: Out-of-region	Quantity	***	***	***	***	***
U.S. shipments: All regions	Quantity	***	***	***	***	***
Export shipments	Quantity	***	***	***	***	***
Total shipments	Quantity	***	***	***	***	***
U.S. shipments: Within region	Value	***	***	***	***	***
U.S. shipments: Out-of-region	Value	***	***	***	***	***
U.S. shipments: All regions	Value	***	***	***	***	***
Export shipments	Value	***	***	***	***	***
Total shipments	Value	***	***	***	***	***
U.S. shipments: Within region	Unit value	***	***	***	***	***
U.S. shipments: Out-of-region	Unit value	***	***	***	***	***
U.S. shipments: All regions	Unit value	***	***	***	***	***
Export shipments	Unit value	***	***	***	***	***
Total shipments	Unit value	***	***	***	***	***
U.S. shipments: Within region	Share 1	***	***	***	***	***
U.S. shipments: Out-of-region	Share 1	***	***	***	***	***
U.S. shipments: All regions	Share 1	100.0	100.0	100.0	100.0	100.0
U.S. shipments: Within region	Share 2	***	***	***	***	***
U.S. shipments: Out-of-region	Share 2	***	***	***	***	***
U.S. shipments: All regions	Share 2	***	***	***	***	***
Export shipments	Share 2	***	***	***	***	***
Total shipments	Share 2	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Share 1 is the share of U.S. shipments quantity. Share 2 is the share of total shipments quantity.

**Table E.5 All fresh strawberries: Within region U.S. producers' U.S. shipments, by product type, region shipped, and period**

Quantity in 1,000 pounds; Value in 1,000 dollars; Unit values in dollars per pound; Share in percent; Interim period is January through September

Product type	Region shipped	Measure	2022	2023	2024	Interim 2024	Interim 2025
Organic	Within region	Quantity	***	***	***	***	***
Conventional	Within region	Quantity	***	***	***	***	***
All product types	Within region	Quantity	***	***	***	***	***
Organic	Out-of-region	Quantity	***	***	***	***	***
Conventional	Out-of-region	Quantity	***	***	***	***	***
All product types	Out-of-region	Quantity	***	***	***	***	***
Organic	All regions	Quantity	***	***	***	***	***
Conventional	All regions	Quantity	***	***	***	***	***
All product types	All regions	Quantity	***	***	***	***	***
Organic	Within region	Value	***	***	***	***	***
Conventional	Within region	Value	***	***	***	***	***
All product types	Within region	Value	***	***	***	***	***
Organic	Out-of-region	Value	***	***	***	***	***
Conventional	Out-of-region	Value	***	***	***	***	***
All product types	Out-of-region	Value	***	***	***	***	***
Organic	All regions	Value	***	***	***	***	***
Conventional	All regions	Value	***	***	***	***	***
All product types	All regions	Value	***	***	***	***	***
Organic	Within region	Unit value	***	***	***	***	***
Conventional	Within region	Unit value	***	***	***	***	***
All product types	Within region	Unit value	***	***	***	***	***
Organic	Out-of-region	Unit value	***	***	***	***	***
Conventional	Out-of-region	Unit value	***	***	***	***	***
All product types	Out-of-region	Unit value	***	***	***	***	***
Organic	All regions	Unit value	***	***	***	***	***
Conventional	All regions	Unit value	***	***	***	***	***
All product types	All regions	Unit value	***	***	***	***	***

Table continued.

**Table E.5 (Continued) All fresh strawberries: Within region U.S. producers' U.S. shipments, by product type, region shipped, and period**

Quantity in 1,000 pounds; Value in 1,000 dollars; Unit values in dollars per pound; Share in percent; Interim period is January through September

Product type	Region shipped	Measure	2022	2023	2024	Interim 2024	Interim 2025
Organic	Within region	Share of quantity	***	***	***	***	***
Conventional	Within region	Share of quantity	***	***	***	***	***
All product types	Within region	Share of quantity	***	***	***	***	***
Organic	Out-of-region	Share of quantity	***	***	***	***	***
Conventional	Out-of-region	Share of quantity	***	***	***	***	***
All product types	Out-of-region	Share of quantity	***	***	***	***	***
Organic	All regions	Share of quantity	***	***	***	***	***
Conventional	All regions	Share of quantity	***	***	***	***	***
All product types	All regions	Share of quantity	100.0	100.0	100.0	100.0	100.0
Organic	Within region	Share of value	***	***	***	***	***
Conventional	Within region	Share of value	***	***	***	***	***
All product types	Within region	Share of value	***	***	***	***	***
Organic	Out-of-region	Share of value	***	***	***	***	***
Conventional	Out-of-region	Share of value	***	***	***	***	***
All product types	Out-of-region	Share of value	***	***	***	***	***
Organic	All regions	Share of value	***	***	***	***	***
Conventional	All regions	Share of value	***	***	***	***	***
All product types	All regions	Share of value	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “—”.

**Table E.6 All fresh strawberries: National U.S. producers' U.S. shipments, by product type, region shipped, and period**

Quantity in 1,000 pounds; Value in 1,000 dollars; Unit values in dollars per pound; Share in percent; Interim period is January through September

Product type	Region shipped	Measure	2022	2023	2024	Interim 2024	Interim 2025
Organic	Within region	Quantity	***	***	***	***	***
Conventional	Within region	Quantity	***	***	***	***	***
All product types	Within region	Quantity	***	***	***	***	***
Organic	Out-of-region	Quantity	***	***	***	***	***
Conventional	Out-of-region	Quantity	***	***	***	***	***
All product types	Out-of-region	Quantity	***	***	***	***	***
Organic	All regions	Quantity	***	***	***	***	***
Conventional	All regions	Quantity	***	***	***	***	***
All product types	All regions	Quantity	***	***	***	***	***
Organic	Within region	Value	***	***	***	***	***
Conventional	Within region	Value	***	***	***	***	***
All product types	Within region	Value	***	***	***	***	***
Organic	Out-of-region	Value	***	***	***	***	***
Conventional	Out-of-region	Value	***	***	***	***	***
All product types	Out-of-region	Value	***	***	***	***	***
Organic	All regions	Value	***	***	***	***	***
Conventional	All regions	Value	***	***	***	***	***
All product types	All regions	Value	***	***	***	***	***
Organic	Within region	Unit value	***	***	***	***	***
Conventional	Within region	Unit value	***	***	***	***	***
All product types	Within region	Unit value	***	***	***	***	***
Organic	Out-of-region	Unit value	***	***	***	***	***
Conventional	Out-of-region	Unit value	***	***	***	***	***
All product types	Out-of-region	Unit value	***	***	***	***	***
Organic	All regions	Unit value	***	***	***	***	***
Conventional	All regions	Unit value	***	***	***	***	***
All product types	All regions	Unit value	***	***	***	***	***

Table continued.

**Table E.6 (Continued) All fresh strawberries: National U.S. producers' U.S. shipments, by product type, region shipped, and period**

Quantity in 1,000 pounds; Value in 1,000 dollars; Unit values in dollars per pound; Share in percent; Interim period is January through September

Product type	Region shipped	Measure	2022	2023	2024	Interim 2024	Interim 2025
Organic	Within region	Share of quantity	***	***	***	***	***
Conventional	Within region	Share of quantity	***	***	***	***	***
All product types	Within region	Share of quantity	***	***	***	***	***
Organic	Out-of-region	Share of quantity	***	***	***	***	***
Conventional	Out-of-region	Share of quantity	***	***	***	***	***
All product types	Out-of-region	Share of quantity	***	***	***	***	***
Organic	All regions	Share of quantity	***	***	***	***	***
Conventional	All regions	Share of quantity	***	***	***	***	***
All product types	All regions	Share of quantity	100.0	100.0	100.0	100.0	100.0
Organic	Within region	Share of value	***	***	***	***	***
Conventional	Within region	Share of value	***	***	***	***	***
All product types	Within region	Share of value	***	***	***	***	***
Organic	Out-of-region	Share of value	***	***	***	***	***
Conventional	Out-of-region	Share of value	***	***	***	***	***
All product types	Out-of-region	Share of value	***	***	***	***	***
Organic	All regions	Share of value	***	***	***	***	***
Conventional	All regions	Share of value	***	***	***	***	***
All product types	All regions	Share of value	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

**Table E.7 All fresh strawberries: Driscoll's within region U.S. production, all U.S. imports from subject sources, and ratio of all subject imports to production, by period**

Quantity in 1,000 pounds; Ratios in percent; Interim period is January through September

Item	Measure	2022	2023	2024	Interim 2024	Interim 2025
U.S. production	Quantity	***	***	***	***	***
Imports from Mexico (subject)	Quantity	***	***	***	***	***
Imports from Mexico to U.S. production	Ratio	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

**Table E.8 All fresh strawberries: Driscoll's national U.S. production, all U.S. imports from subject sources, and ratio of all subject imports to production, by period**

Quantity in 1,000 pounds; Ratios in percent; Interim period is January through September

Item	Measure	2022	2023	2024	Interim 2024	Interim 2025
U.S. production	Quantity	***	***	***	***	***
Imports from Mexico (subject)	Quantity	***	***	***	***	***
Imports from Mexico to U.S. production	Ratio	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

**Table E.9 All fresh strawberries: \*\*\*\*s within region U.S. production, all U.S. imports from subject sources, and ratio of all subject imports to production, by period**

Quantity in 1,000 pounds; Ratios in percent; Interim period is January through September

Item	Measure	2022	2023	2024	Interim 2024	Interim 2025
U.S. production	Quantity	***	***	***	***	***
Imports from Mexico (subject)	Quantity	***	***	***	***	***
Imports from Mexico to U.S. production	Ratio	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

**Table E.10 All fresh strawberries: Within region U.S. producers' employment related information, by item and period**

Item	2022	2023	2024	Interim 2024	Interim 2025
Production and related workers (PRWs) (number)	***	***	***	***	***
Total hours worked (1,000 hours)	***	***	***	***	***
Hours worked per PRW (hours)	***	***	***	***	***
Wages paid (\$1,000)	***	***	***	***	***
Hourly wages (dollars per hour)	***	***	***	***	***
Productivity (pounds per hour)	***	***	***	***	***
Unit labor costs (dollars per pound)	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

**Table E.11 All fresh strawberries: National U.S. producers' employment related information, by item and period**

Item	2022	2023	2024	Interim 2024	Interim 2025
Production and related workers (PRWs) (number)	***	***	***	***	***
Total hours worked (1,000 hours)	***	***	***	***	***
Hours worked per PRW (hours)	***	***	***	***	***
Wages paid (\$1,000)	***	***	***	***	***
Hourly wages (dollars per hour)	***	***	***	***	***
Productivity (pounds per hour)	***	***	***	***	***
Unit labor costs (dollars per pound)	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: \*\*\*.

**Table E.12 All fresh strawberries: U.S. importers, their headquarters, and share of total imports within a given source by firm, 2024**

Shares in percent

Firm	Headquarters	Within region: Mexico	Within region: Nonsubject	Within region: All imports	National: Mexico	National: Nonsubject	National: All imports
Agrana	Jacona, Mexico	***	***	***	***	***	***
California Giant	Watsonville, CA	***	***	***	***	***	***
Central West	Santa Maria, CA	***	***	***	***	***	***
Driscoll's	Watsonville, CA	***	***	***	***	***	***
Expo Fresh	San Diego, CA	***	***	***	***	***	***
Gem-Pack	Irvine, CA	***	***	***	***	***	***
Good Farms	San Diego, CA	***	***	***	***	***	***
Lange Fresh	St. Louis, MO	***	***	***	***	***	***
Mastronardi	Kingsville, ON	***	***	***	***	***	***
Meridian	San Antonio, TX	***	***	***	***	***	***
Mucci	Kingsville ON Canada	***	***	***	***	***	***
Nature's Choice	San Diego, CA	***	***	***	***	***	***
Sun Belle	Schiller Park, IL	***	***	***	***	***	***
Walmart	Bentonville, AR	***	***	***	***	***	***
Wish Farms	Plant City, FL	***	***	***	***	***	***
All firms	Various	100.0	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

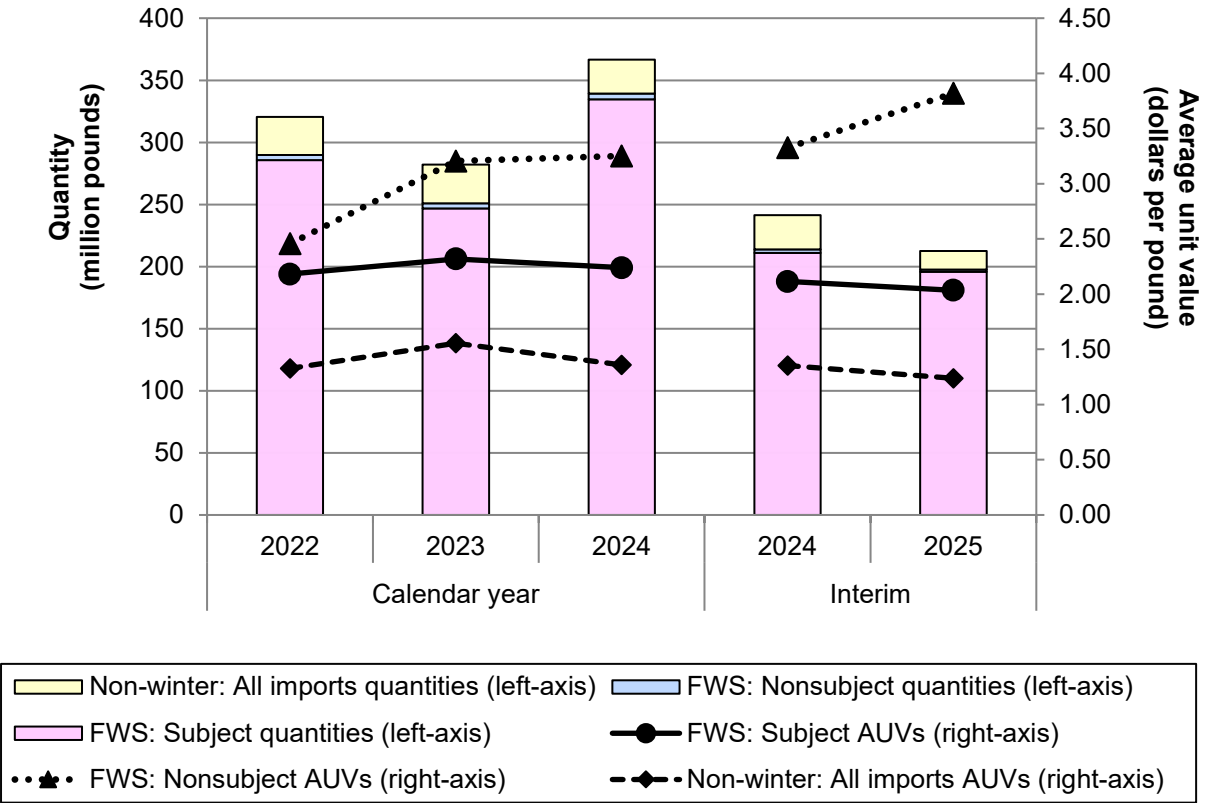
**Table E.13 All fresh strawberries: Within region U.S. imports, by source and period**

Quantity in 1,000 pounds; Value in 1,000 dollars; Unit values in dollars per pound; Share and ratio in percent; Ratio represents the ratio to within region U.S. production; Interim period is January through September

Product and source	Measure	2022	2023	2024	Interim 2024	Interim 2025
FWS: Mexico	Quantity	285,700	246,705	334,591	211,106	195,809
FWS: Nonsubject sources	Quantity	4,197	4,241	4,837	2,849	1,903
FWS: All import sources	Quantity	289,897	250,945	339,429	213,956	197,712
Fresh non-winter strawberries: All import sources	Quantity	30,579	31,221	27,164	27,553	14,883
All fresh strawberries: All import sources	Quantity	320,476	282,166	366,593	241,508	212,595
FWS: Mexico	Value	623,419	572,061	749,448	446,523	398,444
FWS: Nonsubject sources	Value	10,312	13,599	15,728	9,485	7,269
FWS: All import sources	Value	633,731	585,660	765,177	456,009	405,713
Fresh non-winter strawberries: All import sources	Value	40,590	48,566	36,931	37,272	18,424
All fresh strawberries: All import sources	Value	674,321	634,226	802,108	493,280	424,138
FWS: Mexico	Unit value	2.18	2.32	2.24	2.12	2.03
FWS: Nonsubject sources	Unit value	2.46	3.21	3.25	3.33	3.82
FWS: All import sources	Unit value	2.19	2.33	2.25	2.13	2.05
Fresh non-winter strawberries: All import sources	Unit value	1.33	1.56	1.36	1.35	1.24
All fresh strawberries: All import sources	Unit value	2.10	2.25	2.19	2.04	2.00
FWS: Mexico	Share of quantity	89.1	87.4	91.3	87.4	92.1
FWS: Nonsubject sources	Share of quantity	1.3	1.5	1.3	1.2	0.9
FWS: All import sources	Share of quantity	90.5	88.9	92.6	88.6	93.0
Fresh non-winter strawberries: All import sources	Share of quantity	9.5	11.1	7.4	11.4	7.0
All fresh strawberries: All import sources	Share of quantity	100.0	100.0	100.0	100.0	100.0
FWS: Mexico	Share of value	92.5	90.2	93.4	90.5	93.9
FWS: Nonsubject sources	Share of value	1.5	2.1	2.0	1.9	1.7
FWS: All import sources	Share of value	94.0	92.3	95.4	92.4	95.7
Fresh non-winter strawberries: All import sources	Share of value	6.0	7.7	4.6	7.6	4.3
All fresh strawberries: All import sources	Share of value	100.0	100.0	100.0	100.0	100.0
FWS: Mexico	Ratio	127.3	109.4	147.4	110.8	94.5
FWS: Nonsubject sources	Ratio	1.9	1.9	2.1	1.5	0.9
FWS: All import sources	Ratio	129.1	111.3	149.5	112.3	95.5
Fresh non-winter strawberries: All import sources	Ratio	13.6	13.8	12.0	14.5	7.2
All fresh strawberries: All import sources	Ratio	142.7	125.1	161.5	126.8	102.6

Source: Official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.2010, 0810.10.2020, 0810.10.2040, 0810.10.2060, 0810.10.2080, 0810.10.2090, 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, adjusted to report only within region imports by source using the experience of respondents to the Commission's U.S. importer questionnaire. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values.

**Figure E.2 All fresh strawberries: Within region U.S. import quantities and average unit values, by source and period**



Source: Official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.2010, 0810.10.2020, 0810.10.2040, 0810.10.2060, 0810.10.2080, 0810.10.2090, 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, adjusted to report only within region imports by source using the experience of respondents to the Commission's U.S. importer questionnaire. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values.

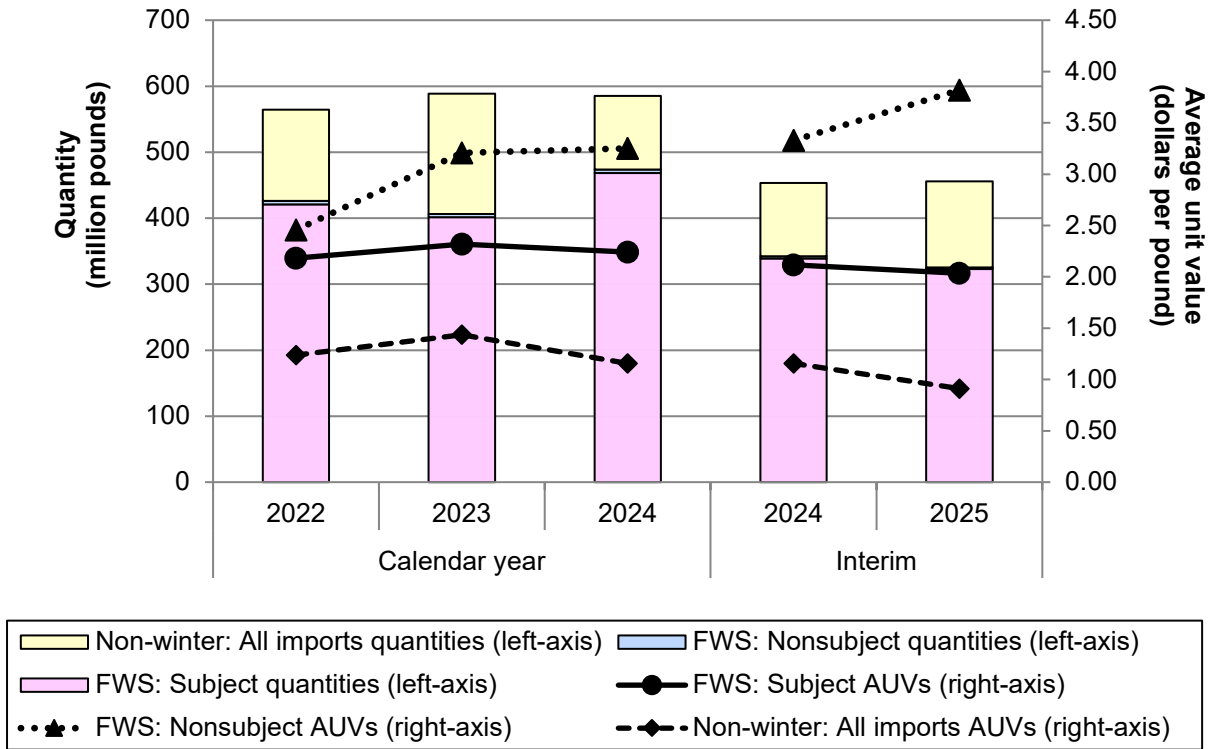
**Table E.14 All fresh strawberries: U.S. imports, by source and period**

Quantity in 1,000 pounds; Value in 1,000 dollars; Unit values in dollars per pound; Share and ratio in percent; Ratio represents the ratio to national U.S. production; Interim period is January through September

Product and source	Measure	2022	2023	2024	Interim 2024	Interim 2025
FWS: Mexico	Quantity	421,065	401,295	468,374	338,781	322,992
FWS: Nonsubject sources	Quantity	5,072	5,278	5,545	3,416	2,201
FWS: All import sources	Quantity	426,138	406,573	473,920	342,197	325,193
Fresh non-winter strawberries: All import sources	Quantity	138,264	181,973	111,471	111,208	130,767
All fresh strawberries: All import sources	Quantity	564,401	588,546	585,391	453,405	455,960
FWS: Mexico	Value	918,796	930,527	1,049,108	716,577	657,243
FWS: Nonsubject sources	Value	12,463	16,925	18,029	11,370	8,408
FWS: All import sources	Value	931,259	947,451	1,067,137	727,947	665,651
Fresh non-winter strawberries: All import sources	Value	170,949	261,228	129,074	128,703	119,211
All fresh strawberries: All import sources	Value	1,102,208	1,208,680	1,196,211	856,651	784,863
FWS: Mexico	Unit value	2.18	2.32	2.24	2.12	2.03
FWS: Nonsubject sources	Unit value	2.46	3.21	3.25	3.33	3.82
FWS: All import sources	Unit value	2.19	2.33	2.25	2.13	2.05
Fresh non-winter strawberries: All import sources	Unit value	1.24	1.44	1.16	1.16	0.91
All fresh strawberries: All import sources	Unit value	1.95	2.05	2.04	1.89	1.72
FWS: Mexico	Share of quantity	74.6	68.2	80.0	74.7	70.8
FWS: Nonsubject sources	Share of quantity	0.9	0.9	0.9	0.8	0.5
FWS: All import sources	Share of quantity	75.5	69.1	81.0	75.5	71.3
Fresh non-winter strawberries: All import sources	Share of quantity	24.5	30.9	19.0	24.5	28.7
All fresh strawberries: All import sources	Share of quantity	100.0	100.0	100.0	100.0	100.0
FWS: Mexico	Share of value	83.4	77.0	87.7	83.6	83.7
FWS: Nonsubject sources	Share of value	1.1	1.4	1.5	1.3	1.1
FWS: All import sources	Share of value	84.5	78.4	89.2	85.0	84.8
Fresh non-winter strawberries: All import sources	Share of value	15.5	21.6	10.8	15.0	15.2
All fresh strawberries: All import sources	Share of value	100.0	100.0	100.0	100.0	100.0
FWS: Mexico	Ratio	***	***	***	***	***
FWS: Nonsubject sources	Ratio	***	***	***	***	***
FWS: All import sources	Ratio	***	***	***	***	***
Fresh non-winter strawberries: All import sources	Ratio	***	***	***	***	***
All fresh strawberries: All import sources	Ratio	***	***	***	***	***

Source: Official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.2010, 0810.10.2020, 0810.10.2040, 0810.10.2060, 0810.10.2080, 0810.10.2090, 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values.

**Figure E.3 All fresh strawberries: All U.S. import quantities and average unit values, by source and period**



Source: Official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.2010, 0810.10.2020, 0810.10.2040, 0810.10.2060, 0810.10.2080, 0810.10.2090, 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values.

**Table E.15 All fresh strawberries: National U.S. imports, by source, destination region, and period**

Quantity in 1,000 pounds; Value in 1,000 dollars; Unit values in dollars per pound; Share and ratio in percent; Ratio represents the ratio to national U.S. production; Interim period is January through September

Product type, source and destination region	Measure	2022	2023	2024	Interim 2024	Interim 2025
FWS: Mexico: Within region	Quantity	285,700	246,705	334,591	211,106	195,809
FWS: Mexico: Out-of-region	Quantity	135,365	154,590	133,783	127,675	127,183
FWS: Mexico: All regions	Quantity	421,065	401,295	468,374	338,781	322,992
FWS: Mexico: Within region	Share	67.9	61.5	71.4	62.3	60.6
FWS: Mexico: Out-of-region	Share	32.1	38.5	28.6	37.7	39.4
FWS: Mexico: All regions	Share	100.0	100.0	100.0	100.0	100.0
FWS: Nonsubject sources: Within region	Quantity	4,197	4,241	4,837	2,849	1,903
FWS: Nonsubject sources: Out-of-region	Quantity	875	1,037	708	566	298
FWS: Nonsubject sources: All regions	Quantity	5,072	5,278	5,545	3,416	2,201
FWS: Nonsubject sources: Within region	Share	82.7	80.3	87.2	83.4	86.5
FWS: Nonsubject sources: Out-of-region	Share	17.3	19.7	12.8	16.6	13.5
FWS: Nonsubject sources: All regions	Share	100.0	100.0	100.0	100.0	100.0
FWS: All import sources: Within region	Quantity	289,897	250,945	339,429	213,956	197,712
FWS: All import sources: Out-of-region	Quantity	136,241	155,627	134,491	128,242	127,481
FWS: All import sources: All regions	Quantity	426,138	406,573	473,920	342,197	325,193
FWS: All import sources: Within region	Share	68.0	61.7	71.6	62.5	60.8
FWS: All import sources: Out-of-region	Share	32.0	38.3	28.4	37.5	39.2
FWS: All import sources: All regions	Share	100.0	100.0	100.0	100.0	100.0
Non-winter strawberries: All import sources: Within region	Quantity	30,579	31,221	27,164	27,553	14,883
Non-winter strawberries: All import sources: Out-of-region	Quantity	107,684	150,752	84,307	83,656	115,884
Non-winter strawberries: All import sources: All regions	Quantity	138,264	181,973	111,471	111,208	130,767
Non-winter strawberries: All import sources: Within region	Share	22.1	17.2	24.4	24.8	11.4
Non-winter strawberries: All import sources: Out-of-region	Share	77.9	82.8	75.6	75.2	88.6
Non-winter strawberries: All import sources: All regions	Share	100.0	100.0	100.0	100.0	100.0
All fresh strawberries: All import sources: Within region	Quantity	320,476	282,166	366,593	241,508	212,595
All fresh strawberries: All import sources: Out-of-region	Quantity	243,925	306,379	218,798	211,897	243,365
All fresh strawberries: All import sources: All regions	Quantity	564,401	588,546	585,391	453,405	455,960
All fresh strawberries: All import sources: Within region	Share	56.8	47.9	62.6	53.3	46.6
All fresh strawberries: All import sources: Out-of-region	Share	43.2	52.1	37.4	46.7	53.4
All fresh strawberries: All import sources: All regions	Share	100.0	100.0	100.0	100.0	100.0

Source: Official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.2010, 0810.10.2020, 0810.10.2040, 0810.10.2060, 0810.10.2080, 0810.10.2090, 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values.

**Table E.16 All fresh strawberries: U.S. importers' within region U.S. shipments of imports from Mexico, by product type and period**

Quantity in 1,000 pounds; Value in 1,000 dollars; Unit values in dollars per pound; Share in percent; Interim period is January through September

Product type	Measure	2022	2023	2024	Interim 2024	Interim 2025
Organic	Quantity	***	***	***	***	***
Conventional	Quantity	***	***	***	***	***
All product type	Quantity	***	***	***	***	***
Organic	Value	***	***	***	***	***
Conventional	Value	***	***	***	***	***
All product type	Value	***	***	***	***	***
Organic	Unit value	***	***	***	***	***
Conventional	Unit value	***	***	***	***	***
All product type	Unit value	***	***	***	***	***
Organic	Share of quantity	***	***	***	***	***
Conventional	Share of quantity	***	***	***	***	***
All product type	Share of quantity	100.0	100.0	100.0	100.0	100.0
Organic	Share of value	***	***	***	***	***
Conventional	Share of value	***	***	***	***	***
All product type	Share of value	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

**Table E.17 All fresh strawberries: U.S. importers' within region U.S. shipments of imports from nonsubject sources, by product type and period**

Quantity in 1,000 pounds; Value in 1,000 dollars; Unit values in dollars per pound; Share in percent; Interim period is January through September

Product type	Measure	2022	2023	2024	Interim 2024	Interim 2025
Organic	Quantity	***	***	***	***	***
Conventional	Quantity	***	***	***	***	***
All product type	Quantity	***	***	***	***	***
Organic	Value	***	***	***	***	***
Conventional	Value	***	***	***	***	***
All product type	Value	***	***	***	***	***
Organic	Unit value	***	***	***	***	***
Conventional	Unit value	***	***	***	***	***
All product type	Unit value	***	***	***	***	***
Organic	Share of quantity	***	***	***	***	***
Conventional	Share of quantity	***	***	***	***	***
All product type	Share of quantity	100.0	100.0	100.0	100.0	100.0
Organic	Share of value	***	***	***	***	***
Conventional	Share of value	***	***	***	***	***
All product type	Share of value	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

**Table E.18 All fresh strawberries: U.S. importers' national U.S. shipments of imports from Mexico, by product type and period**

Quantity in 1,000 pounds; Value in 1,000 dollars; Unit values in dollars per pound; Share in percent; Interim period is January through September

Product type	Measure	2022	2023	2024	Interim 2024	Interim 2025
Organic	Quantity	***	***	***	***	***
Conventional	Quantity	***	***	***	***	***
All product type	Quantity	***	***	***	***	***
Organic	Value	***	***	***	***	***
Conventional	Value	***	***	***	***	***
All product type	Value	***	***	***	***	***
Organic	Unit value	***	***	***	***	***
Conventional	Unit value	***	***	***	***	***
All product type	Unit value	***	***	***	***	***
Organic	Share of quantity	***	***	***	***	***
Conventional	Share of quantity	***	***	***	***	***
All product type	Share of quantity	100.0	100.0	100.0	100.0	100.0
Organic	Share of value	***	***	***	***	***
Conventional	Share of value	***	***	***	***	***
All product type	Share of value	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

**Table E.19 All fresh strawberries: U.S. importers' national U.S. shipments of imports from nonsubject sources, by product type and period**

Quantity in 1,000 pounds; Value in 1,000 dollars; Unit values in dollars per pound; Share in percent; Interim period is January through September

Product type	Measure	2022	2023	2024	Interim 2024	Interim 2025
Organic	Quantity	***	***	***	***	***
Conventional	Quantity	***	***	***	***	***
All product type	Quantity	***	***	***	***	***
Organic	Value	***	***	***	***	***
Conventional	Value	***	***	***	***	***
All product type	Value	***	***	***	***	***
Organic	Unit value	***	***	***	***	***
Conventional	Unit value	***	***	***	***	***
All product type	Unit value	***	***	***	***	***
Organic	Share of quantity	***	***	***	***	***
Conventional	Share of quantity	***	***	***	***	***
All product type	Share of quantity	100.0	100.0	100.0	100.0	100.0
Organic	Share of value	***	***	***	***	***
Conventional	Share of value	***	***	***	***	***
All product type	Share of value	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

**Table E.20 All fresh strawberries: Within region apparent U.S. consumption and market shares based on quantity data, by source and period**

Quantity in 1,000 pounds; Shares in percent; Interim period is January through September

Source	Measure	2022	2023	2024	Interim 2024	Interim 2025
U.S. producers: Located within region	Quantity	***	***	***	***	***
U.S. producers: Located out-of-region	Quantity	***	***	***	***	***
U.S. producers: Located throughout U.S.	Quantity	***	***	***	***	***
FWS: Mexico	Quantity	285,700	246,705	334,591	211,106	195,809
FWS: Nonsubject sources	Quantity	4,197	4,241	4,837	2,849	1,903
FWS: All import sources	Quantity	289,897	250,945	339,429	213,956	197,712
Fresh non-winter strawberries: All import sources	Quantity	30,579	31,221	27,164	27,553	14,883
All fresh strawberries: All import sources	Quantity	320,476	282,166	366,593	241,508	212,595
All sources	Quantity	***	***	***	***	***
U.S. producers: Located within region	Share	***	***	***	***	***
U.S. producers: Located out-of-region	Share	***	***	***	***	***
U.S. producers: Located throughout U.S.	Share	***	***	***	***	***
FWS: Mexico	Share	***	***	***	***	***
FWS: Nonsubject sources	Share	***	***	***	***	***
FWS: All import sources	Share	***	***	***	***	***
Fresh non-winter strawberries: All import sources	Share	***	***	***	***	***
All fresh strawberries: All import sources	Share	***	***	***	***	***
All sources	Share	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires for U.S. producers' U.S. shipments data and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.2010, 0810.10.2020, 0810.10.2040, 0810.10.2060, 0810.10.2080, 0810.10.2090, 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026 adjusted to report only within region imports by source using the experience of respondents to the Commission's U.S. importer questionnaire. Imports are based on the imports for consumption data series.

**Figure E.4 All fresh strawberries: Within region apparent U.S. consumption based on quantity data, by source and period**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires for U.S. producers' U.S. shipments data and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.2010, 0810.10.2020, 0810.10.2040, 0810.10.2060, 0810.10.2080, 0810.10.2090, 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026 adjusted to report only within region imports by source using the experience of respondents to the Commission's U.S. importer questionnaire. Imports are based on the imports for consumption data series.

**Table E.21 All fresh strawberries: Within region apparent U.S. consumption and market shares based on value data, by source and period**

Value in 1,000 dollars; Shares in percent; Interim period is January through September

Source	Measure	2022	2023	2024	Interim 2024	Interim 2025
U.S. producers: Located within region	Value	***	***	***	***	***
U.S. producers: Located out-of-region	Value	***	***	***	***	***
U.S. producers: Located throughout U.S.	Value	***	***	***	***	***
FWS: Mexico	Value	623,419	572,061	749,448	446,523	398,444
FWS: Nonsubject sources	Value	10,312	13,599	15,728	9,485	7,269
FWS: All import sources	Value	633,731	585,660	765,177	456,009	405,713
Fresh non-winter strawberries: All import sources	Value	40,590	48,566	36,931	37,272	18,424
All fresh strawberries: All import sources	Value	674,321	634,226	802,108	493,280	424,138
All sources	Value	***	***	***	***	***
U.S. producers: Located within region	Share	***	***	***	***	***
U.S. producers: Located out-of-region	Share	***	***	***	***	***
U.S. producers: Located throughout U.S.	Share	***	***	***	***	***
FWS: Mexico	Share	***	***	***	***	***
FWS: Nonsubject sources	Share	***	***	***	***	***
FWS: All import sources	Share	***	***	***	***	***
Fresh non-winter strawberries: All import sources	Share	***	***	***	***	***
All fresh strawberries: All import sources	Share	***	***	***	***	***
All sources	Share	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires for U.S. producers' U.S. shipments data and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.2010, 0810.10.2020, 0810.10.2040, 0810.10.2060, 0810.10.2080, 0810.10.2090, 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026 adjusted to report only within region imports by source using the experience of respondents to the Commission's U.S. importer questionnaire. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values.

**Figure E.5 All fresh strawberries: Within region apparent U.S. consumption based on value data, by source and period**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires for U.S. producers' U.S. shipments data and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.2010, 0810.10.2020, 0810.10.2040, 0810.10.2060, 0810.10.2080, 0810.10.2090, 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026 adjusted to report only within region imports by source using the experience of respondents to the Commission's U.S. importer questionnaire. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values.

**Table E.22 All fresh strawberries: National apparent U.S. consumption and market shares based on quantity data, by source and period**

Quantity in 1,000 pounds; Shares in percent; Interim period is January through September

Source	Measure	2022	2023	2024	Interim 2024	Interim 2025
U.S. producers: Located within region	Quantity	***	***	***	***	***
U.S. producers: Located out-of-region	Quantity	***	***	***	***	***
U.S. producers: Located throughout U.S.	Quantity	***	***	***	***	***
FWS: Mexico	Quantity	421,065	401,295	468,374	338,781	322,992
FWS: Nonsubject sources	Quantity	5,072	5,278	5,545	3,416	2,201
FWS: All import sources	Quantity	426,138	406,573	473,920	342,197	325,193
Fresh non-winter strawberries: All import sources	Quantity	138,264	181,973	111,471	111,208	130,767
All fresh strawberries: All import sources	Quantity	564,401	588,546	585,391	453,405	455,960
All sources	Quantity	***	***	***	***	***
U.S. producers: Located within region	Share	***	***	***	***	***
U.S. producers: Located out-of-region	Share	***	***	***	***	***
U.S. producers: Located throughout U.S.	Share	***	***	***	***	***
FWS: Mexico	Share	***	***	***	***	***
FWS: Nonsubject sources	Share	***	***	***	***	***
FWS: All import sources	Share	***	***	***	***	***
Fresh non-winter strawberries: All import sources	Share	***	***	***	***	***
All fresh strawberries: All import sources	Share	***	***	***	***	***
All sources	Share	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires for U.S. producers' U.S. shipments data and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.2010, 0810.10.2020, 0810.10.2040, 0810.10.2060, 0810.10.2080, 0810.10.2090, 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, for U.S. imports data. Imports are based on the imports for consumption data series.

**Figure E.6 All fresh strawberries: National apparent U.S. consumption based on quantity data, by source and period**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires for U.S. producers' U.S. shipments data and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.2010, 0810.10.2020, 0810.10.2040, 0810.10.2060, 0810.10.2080, 0810.10.2090, 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, for U.S. imports data. Imports are based on the imports for consumption data series.

**Table E.23 All fresh strawberries: National apparent U.S. consumption and market shares based on value data, by source and period**

Value in 1,000 dollars; Shares in percent; Interim period is January through September

Source	Measure	2022	2023	2024	Interim 2024	Interim 2025
U.S. producers: Located within region	Value	***	***	***	***	***
U.S. producers: Located out-of-region	Value	***	***	***	***	***
U.S. producers: Located throughout U.S.	Value	***	***	***	***	***
FWS: Mexico	Value	918,796	930,527	1,049,108	716,577	657,243
FWS: Nonsubject sources	Value	12,463	16,925	18,029	11,370	8,408
FWS: All import sources	Value	931,259	947,451	1,067,137	727,947	665,651
Fresh non-winter strawberries: All import sources	Value	170,949	261,228	129,074	128,703	119,211
All fresh strawberries: All import sources	Value	1,102,208	1,208,680	1,196,211	856,651	784,863
All sources	Value	***	***	***	***	***
U.S. producers: Located within region	Share	***	***	***	***	***
U.S. producers: Located out-of-region	Share	***	***	***	***	***
U.S. producers: Located throughout U.S.	Share	***	***	***	***	***
FWS: Mexico	Share	***	***	***	***	***
FWS: Nonsubject sources	Share	***	***	***	***	***
FWS: All import sources	Share	***	***	***	***	***
Fresh non-winter strawberries: All import sources	Share	***	***	***	***	***
All fresh strawberries: All import sources	Share	***	***	***	***	***
All sources	Share	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires for U.S. producers' U.S. shipments data and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.2010, 0810.10.2020, 0810.10.2040, 0810.10.2060, 0810.10.2080, 0810.10.2090, 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, for U.S. imports data. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values.

**Figure E.7 All fresh strawberries: National apparent U.S. consumption based on value data, by source and period**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires for U.S. producers' U.S. shipments data and official U.S. import statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 0810.10.2010, 0810.10.2020, 0810.10.2040, 0810.10.2060, 0810.10.2080, 0810.10.2090, 0810.10.4010, 0810.10.4020, 0810.10.4040, 0810.10.4060, 0810.10.4080 and 0810.10.4090, accessed January 15, 2026, for U.S. imports data. Imports are based on the imports for consumption data series. Import value data reflects the landed duty-paid values.

**Table E.24 All fresh strawberries: Within region U.S. producers' results of operations, by item and period**

Quantity in 1,000 pounds; Value in 1,000 dollars; Ratio in percent; Interim period is January through September

Item	Measure	2022	2023	2024	Interim 2024	Interim 2025
Total net sales	Quantity	***	***	***	***	***
Total net sales	Value	***	***	***	***	***
COGS: Growing costs: Labor hired	Value	***	***	***	***	***
COGS: Growing costs: All other	Value	***	***	***	***	***
COGS: All growing costs	Value	***	***	***	***	***
COGS: Packing costs	Value	***	***	***	***	***
COGS: Total	Value	***	***	***	***	***
Gross profit or (loss)	Value	***	***	***	***	***
SG&A expenses	Value	***	***	***	***	***
Operating income or (loss)	Value	***	***	***	***	***
Other expense / (income), net	Value	***	***	***	***	***
Net income or (loss)	Value	***	***	***	***	***
Depreciation/amortization	Value	***	***	***	***	***
Cash flow	Value	***	***	***	***	***
COGS: Growing costs: Labor hired	Ratio to NS	***	***	***	***	***
COGS: Growing costs: All other	Ratio to NS	***	***	***	***	***
COGS: All growing costs	Ratio to NS	***	***	***	***	***
COGS: Packing costs	Ratio to NS	***	***	***	***	***
COGS: Total	Ratio to NS	***	***	***	***	***
Gross profit	Ratio to NS	***	***	***	***	***
SG&A expense	Ratio to NS	***	***	***	***	***
Operating income or (loss)	Ratio to NS	***	***	***	***	***
Net income or (loss)	Ratio to NS	***	***	***	***	***

Table continued.

**Table E.24 (Continued) All fresh strawberries: Within region U.S. producers' results of operations, by item and period**

Shares in percent; Unit values in dollars per pound; Count in number of firms reporting; Interim period is January through September

Item	Measure	2022	2023	2024	Interim 2024	Interim 2025
COGS: Growing costs: Labor hired	Share	***	***	***	***	***
COGS: Growing costs: All other	Share	***	***	***	***	***
COGS: All growing costs	Share	***	***	***	***	***
COGS: Packing costs	Share	***	***	***	***	***
COGS: Total	Share	100.0	100.0	100.0	100.0	100.0
Total net sales	Unit value	***	***	***	***	***
COGS: Growing costs: Labor hired	Unit value	***	***	***	***	***
COGS: Growing costs: All other	Unit value	***	***	***	***	***
COGS: All growing costs	Unit value	***	***	***	***	***
COGS: Packing costs	Unit value	***	***	***	***	***
COGS: Total	Unit value	***	***	***	***	***
Gross profit or (loss)	Unit value	***	***	***	***	***
SG&A expenses	Unit value	***	***	***	***	***
Operating income or (loss)	Unit value	***	***	***	***	***
Net income or (loss)	Unit value	***	***	***	***	***
Operating losses	Count	4	9	12	7	9
Net losses	Count	4	10	13	7	8
Data	Count	17	18	18	19	19

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

**Table E.25 All fresh strawberries: Changes in AUVs between comparison periods for within region U.S. producers**

Changes in percent; Interim period is January through September

Item	2022–24	2022–23	2023–24	Interim 2024–25
Total net sales	▲***	▲***	▼***	▼***
COGS: Growing costs: Labor hired	▲***	▲***	▲***	▼***
COGS: Growing costs: All other	▲***	▲***	▲***	▲***
COGS: All growing costs	▲***	▲***	▲***	▲***
COGS: Packing costs	▲***	▲***	▼***	▲***
COGS: Total	▲***	▲***	▲***	▲***

Table continued.

**Table E.25 (Continued) All fresh strawberries: Changes in AUVs between comparison periods for within region U.S. producers**

Changes in dollars per pound; Interim period is January through September

Item	2022–24	2022–23	2023–24	Interim 2024–25
Total net sales	▲***	▲***	▼***	▼***
COGS: Growing costs: Labor hired	▲***	▲***	▲***	▼***
COGS: Growing costs: All other	▲***	▲***	▲***	▲***
COGS: All growing costs	▲***	▲***	▲***	▲***
COGS: Packing costs	▲***	▲***	▼***	▲***
COGS: Total	▲***	▲***	▲***	▲***
Gross profit or (loss)	▼***	▼***	▼***	▼***
SG&A expense	▲***	▲***	▲***	▼***
Operating income or (loss)	▼***	▼***	▼***	▼***
Net income or (loss)	▼***	▼***	▼***	▼***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Changes in percentages and unit values shown as “0.0” or “0” represent values greater than zero, but less than “0.05” or “0.5,” respectively. Zeroes, no changes, null values, and undefined calculations are suppressed and shown as “—”. Period changes preceded by a “▲” represent an increase, while period changes preceded by a “▼” represent a decrease.

**Table E.26 All fresh strawberries: National U.S. producers' results of operations, by item and period**

Quantity in 1,000 pounds; Value in 1,000 dollars; Ratio in percent; Interim period is January through September

Item	Measure	2022	2023	2024	Interim 2024	Interim 2025
Total net sales	Quantity	***	***	***	***	***
Total net sales	Value	***	***	***	***	***
COGS: Growing costs: Labor hired	Value	***	***	***	***	***
COGS: Growing costs: All other	Value	***	***	***	***	***
COGS: All growing costs	Value	***	***	***	***	***
COGS: Packing costs	Value	***	***	***	***	***
COGS: Total	Value	***	***	***	***	***
Gross profit or (loss)	Value	***	***	***	***	***
SG&A expenses	Value	***	***	***	***	***
Operating income or (loss)	Value	***	***	***	***	***
Other expense / (income), net	Value	***	***	***	***	***
Net income or (loss)	Value	***	***	***	***	***
Depreciation/amortization	Value	***	***	***	***	***
Cash flow	Value	***	***	***	***	***
COGS: Growing costs: Labor hired	Ratio to NS	***	***	***	***	***
COGS: Growing costs: All other	Ratio to NS	***	***	***	***	***
COGS: All growing costs	Ratio to NS	***	***	***	***	***
COGS: Packing costs	Ratio to NS	***	***	***	***	***
COGS: Total	Ratio to NS	***	***	***	***	***
Gross profit	Ratio to NS	***	***	***	***	***
SG&A expense	Ratio to NS	***	***	***	***	***
Operating income or (loss)	Ratio to NS	***	***	***	***	***
Net income or (loss)	Ratio to NS	***	***	***	***	***

Table continued.

**Table E.26 (Continued) All fresh strawberries: National U.S. producers' results of operations, by item and period**

Shares in percent; Unit values in dollars per pound; Count in number of firms reporting; Interim period is January through September

Item	Measure	2022	2023	2024	Interim 2024	Interim 2025
COGS: Growing costs: Labor hired	Share	***	***	***	***	***
COGS: Growing costs: All other	Share	***	***	***	***	***
COGS: All growing costs	Share	***	***	***	***	***
COGS: Packing costs	Share	***	***	***	***	***
COGS: Total	Share	100.0	100.0	100.0	100.0	100.0
Total net sales	Unit value	***	***	***	***	***
COGS: Growing costs: Labor hired	Unit value	***	***	***	***	***
COGS: Growing costs: All other	Unit value	***	***	***	***	***
COGS: All growing costs	Unit value	***	***	***	***	***
COGS: Packing costs	Unit value	***	***	***	***	***
COGS: Total	Unit value	***	***	***	***	***
Gross profit or (loss)	Unit value	***	***	***	***	***
SG&A expenses	Unit value	***	***	***	***	***
Operating income or (loss)	Unit value	***	***	***	***	***
Net income or (loss)	Unit value	***	***	***	***	***
Operating losses	Count	10	15	15	17	17
Net losses	Count	11	15	16	17	16
Data	Count	33	36	37	38	38

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

**E.27 All fresh strawberries: Changes in AUVs between comparison periods for national U.S. producers**

Changes in percent; Interim period is January through September

Item	2022–24	2022–23	2023–24	Interim 2024–25
Total net sales	▲***	▲***	▼***	▲***
COGS: Growing costs: Labor hired	▼***	▲***	▼***	▼***
COGS: Growing costs: All other	▲***	▲***	▼***	▲***
COGS: All growing costs	▲***	▲***	▼***	▲***
COGS: Packing costs	▼***	▲***	▼***	▼***
COGS: Total	▲***	▲***	▼***	▲***

Table continued.

**Table E.27 (Continued) All fresh strawberries: Changes in AUVs between comparison periods for national U.S. producers**

Changes in dollars per pound; Interim period is January through September

Item	2022–24	2022–23	2023–24	Interim 2024–25
Total net sales	▲***	▲***	▼***	▲***
COGS: Growing costs: Labor hired	▼***	▲***	▼***	▼***
COGS: Growing costs: All other	▲***	▲***	▼***	▲***
COGS: All growing costs	▲***	▲***	▼***	▲***
COGS: Packing costs	▼***	▲***	▼***	▼***
COGS: Total	▲***	▲***	▼***	▲***
Gross profit or (loss)	▼***	▲***	▼***	▼***
SG&A expense	▲***	▲***	▲***	▼***
Operating income or (loss)	▼***	▼***	▼***	▼***
Net income or (loss)	▼***	▼***	▼***	▼***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Changes in percentages and unit values shown as “0.0” or “0” represent values greater than zero, but less than “0.05” or “0.5,” respectively. Zeroes, no changes, null values, and undefined calculations are suppressed and shown as “—”. Period changes preceded by a “▲” represent an increase, while period changes preceded by a “▼” represent a decrease.

**Table E.28 All fresh strawberries: Within region U.S. producers' capital expenditures, R&D expenses, total assets and operating return on assets, by period**

Quantity in 1,000 pounds; Value in 1,000 dollars; Ratio in percent; Interim period is January through September

Item	Measure	2022	2023	2024	Interim 2024	Interim 2025
Capital expenditures	Value	***	***	***	***	***
R&D expenses	Value	***	***	***	***	***
Total assets	Value	***	***	***	***	***
ROA	Ratio	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

**Table E.29 All fresh strawberries: National U.S. producers' capital expenditures, R&D expenses, total assets and operating return on assets, by period**

Quantity in 1,000 pounds; Value in 1,000 dollars; Ratio in percent; Interim period is January through September

Item	Measure	2022	2023	2024	Interim 2024	Interim 2025
Capital expenditures	Value	***	***	***	***	***
R&D expenses	Value	***	***	***	***	***
Total assets	Value	***	***	***	***	***
ROA	Ratio	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

**APPENDIX F**

**RELATED PARTY EXCLUSION PRICING PRODUCTS**



This appendix presents pricing data excluding data from \*\*\*.

**Table F.1 Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 1, and margins of underselling/(overselling) sold within region excluding U.S. producer \*\*\*, by source and month**

Price in dollars per pound, quantity in pounds.

<b>Period</b>	<b>Within region U.S. producers sold within region: Price</b>	<b>Within region U.S. producers sold within region: Quantity</b>	<b>Out-of-region U.S. producers sold within region: Price</b>	<b>Out-of-region U.S. producers sold within region: Quantity</b>	<b>All U.S. producers sold within region: Price</b>	<b>All U.S. producers sold within region: Quantity</b>
January 2022	***	***	***	***	***	***
February 2022	***	***	***	***	***	***
March 2022	***	***	***	***	***	***
April 2022	***	***	***	***	***	***
May 2022	***	***	***	***	***	***
June 2022	***	***	***	***	***	***
July 2022	***	***	***	***	***	***
August 2022	***	***	***	***	***	***
September 2022	***	***	***	***	***	***
October 2022	***	***	***	***	***	***
November 2022	***	***	***	***	***	***
December 2022	***	***	***	***	***	***
January 2023	***	***	***	***	***	***
February 2023	***	***	***	***	***	***
March 2023	***	***	***	***	***	***
April 2023	***	***	***	***	***	***
May 2023	***	***	***	***	***	***
June 2023	***	***	***	***	***	***
July 2023	***	***	***	***	***	***
August 2023	***	***	***	***	***	***
September 2023	***	***	***	***	***	***
October 2023	***	***	***	***	***	***
November 2023	***	***	***	***	***	***
December 2023	***	***	***	***	***	***

Table continued

**Table F.1 (Continued) Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 1, and margins of underselling/(overselling) sold within region excluding U.S. producer \*\*\*, by source and month**

Price in dollars per pound, quantity in pounds.

Period	Mexico sold within region: Price	Mexico sold within region: Quantity	Mexico sold within region: Margin to U.S. producers	Mexico sold within region: Margin to out-of-region U.S. producers	Mexico sold within region: Margin to all U.S. producers sold within region
January 2022	***	***	***	***	***
February 2022	***	***	***	***	***
March 2022	***	***	***	***	***
April 2022	***	***	***	***	***
May 2022	***	***	***	***	***
June 2022	***	***	***	***	***
July 2022	***	***	***	***	***
August 2022	***	***	***	***	***
September 2022	***	***	***	***	***
October 2022	***	***	***	***	***
November 2022	***	***	***	***	***
December 2022	***	***	***	***	***
January 2023	***	***	***	***	***
February 2023	***	***	***	***	***
March 2023	***	***	***	***	***
April 2023	***	***	***	***	***
May 2023	***	***	***	***	***
June 2023	***	***	***	***	***
July 2023	***	***	***	***	***
August 2023	***	***	***	***	***
September 2023	***	***	***	***	***
October 2023	***	***	***	***	***
November 2023	***	***	***	***	***
December 2023	***	***	***	***	***

Table continued.

**Table F.1 (Continued) Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 1, and margins of underselling/(overselling) sold within region excluding U.S. producer \*\*\*, by source and month**

Price in dollars per pound, quantity in pounds.

<b>Period</b>	<b>Within region U.S. producers sold within region: Price</b>	<b>Within region U.S. producers sold within region: Quantity</b>	<b>Out-of-region U.S. producers sold within region: Price</b>	<b>Out-of-region U.S. producers sold within region: Quantity</b>	<b>All U.S. producers sold within region: Price</b>	<b>All U.S. producers sold within region: Quantity</b>
January 2024	***	***	***	***	***	***
February 2024	***	***	***	***	***	***
March 2024	***	***	***	***	***	***
April 2024	***	***	***	***	***	***
May 2024	***	***	***	***	***	***
June 2024	***	***	***	***	***	***
July 2024	***	***	***	***	***	***
August 2024	***	***	***	***	***	***
September 2024	***	***	***	***	***	***
October 2024	***	***	***	***	***	***
November 2024	***	***	***	***	***	***
December 2024	***	***	***	***	***	***
January 2025	***	***	***	***	***	***
February 2025	***	***	***	***	***	***
March 2025	***	***	***	***	***	***
April 2025	***	***	***	***	***	***
May 2025	***	***	***	***	***	***
June 2025	***	***	***	***	***	***
July 2025	***	***	***	***	***	***
August 2025	***	***	***	***	***	***
September 2025	***	***	***	***	***	***

Table continued

**Table F.1 (Continued) Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 1, and margins of underselling/(overselling) sold within region excluding U.S. producer \*\*\*, by source and month**

Price in dollars per pound, quantity in pounds.

Period	Mexico sold within region: Price	Mexico sold within region: Quantity	Mexico sold within region: Margin to U.S. producers	Mexico sold within region: Margin to out-of-region U.S. producers	Mexico sold within region: Margin to all U.S. producers sold within region
January 2024	***	***	***	***	***
February 2024	***	***	***	***	***
March 2024	***	***	***	***	***
April 2024	***	***	***	***	***
May 2024	***	***	***	***	***
June 2024	***	***	***	***	***
July 2024	***	***	***	***	***
August 2024	***	***	***	***	***
September 2024	***	***	***	***	***
October 2024	***	***	***	***	***
November 2024	***	***	***	***	***
December 2024	***	***	***	***	***
January 2025	***	***	***	***	***
February 2025	***	***	***	***	***
March 2025	***	***	***	***	***
April 2025	***	***	***	***	***
May 2025	***	***	***	***	***
June 2025	***	***	***	***	***
July 2025	***	***	***	***	***
August 2025	***	***	***	***	***
September 2025	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 1: Non-organic flat-pack conventional (8-1 lb) fresh winter strawberry, sold to distributors per pound.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

**Figure F.1 Fresh winter strawberries: Weighted-average prices and quantities of domestic and imported product 1 sold within region excluding U.S. producer \*\*\*, by source and month**

**Price of product 1**

\* \* \* \* \*

**Volume of product 1**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires.  
Note: Product 1: Non-organic flat-pack conventional (8-1 lb) fresh winter strawberry, sold to distributors per pound

**Table F.2 Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 2, and margins of underselling/(overselling) sold within region excluding U.S. producer \*\*\*, by source and month**

Price in dollars per pound, quantity in pounds.

<b>Period</b>	<b>Within region U.S. producers sold within region: Price</b>	<b>Within region U.S. producers sold within region: Quantity</b>	<b>Out-of-region U.S. producers sold within region: Price</b>	<b>Out-of-region U.S. producers sold within region: Quantity</b>	<b>All U.S. producers sold within region: Price</b>	<b>All U.S. producers sold within region: Quantity</b>
January 2022	***	***	***	***	***	***
February 2022	***	***	***	***	***	***
March 2022	***	***	***	***	***	***
April 2022	***	***	***	***	***	***
May 2022	***	***	***	***	***	***
June 2022	***	***	***	***	***	***
July 2022	***	***	***	***	***	***
August 2022	***	***	***	***	***	***
September 2022	***	***	***	***	***	***
October 2022	***	***	***	***	***	***
November 2022	***	***	***	***	***	***
December 2022	***	***	***	***	***	***
January 2023	***	***	***	***	***	***
February 2023	***	***	***	***	***	***
March 2023	***	***	***	***	***	***
April 2023	***	***	***	***	***	***
May 2023	***	***	***	***	***	***
June 2023	***	***	***	***	***	***
July 2023	***	***	***	***	***	***
August 2023	***	***	***	***	***	***
September 2023	***	***	***	***	***	***
October 2023	***	***	***	***	***	***
November 2023	***	***	***	***	***	***
December 2023	***	***	***	***	***	***

Table continued

**Table F.2 (Continued) Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 2, and margins of underselling/(overselling) sold within region excluding U.S. producer \*\*\*, by source and month**

Price in dollars per pound, quantity in pounds.

Period	Mexico sold within region: Price	Mexico sold within region: Quantity	Mexico sold within region: Margin to within region U.S. producers	Mexico sold within region: Margin to out-of-region U.S. producers	Mexico sold within region: Margin to all U.S. producers sold within region
January 2022	***	***	***	***	***
February 2022	***	***	***	***	***
March 2022	***	***	***	***	***
April 2022	***	***	***	***	***
May 2022	***	***	***	***	***
June 2022	***	***	***	***	***
July 2022	***	***	***	***	***
August 2022	***	***	***	***	***
September 2022	***	***	***	***	***
October 2022	***	***	***	***	***
November 2022	***	***	***	***	***
December 2022	***	***	***	***	***
January 2023	***	***	***	***	***
February 2023	***	***	***	***	***
March 2023	***	***	***	***	***
April 2023	***	***	***	***	***
May 2023	***	***	***	***	***
June 2023	***	***	***	***	***
July 2023	***	***	***	***	***
August 2023	***	***	***	***	***
September 2023	***	***	***	***	***
October 2023	***	***	***	***	***
November 2023	***	***	***	***	***
December 2023	***	***	***	***	***

Table continued.

**Table F.2 (Continued) Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 2, and margins of underselling/(overselling) sold within region excluding U.S. producer \*\*\*, by source and month**

Price in dollars per pound, quantity in pounds.

<b>Period</b>	<b>Within region U.S. producers sold within region: Price</b>	<b>Within region U.S. producers sold within region: Quantity</b>	<b>Out-of-region U.S. producers sold within region: Price</b>	<b>Out-of-region U.S. producers sold within region: Quantity</b>	<b>All U.S. producers sold within region: Price</b>	<b>All U.S. producers sold within region: Quantity</b>
January 2024	***	***	***	***	***	***
February 2024	***	***	***	***	***	***
March 2024	***	***	***	***	***	***
April 2024	***	***	***	***	***	***
May 2024	***	***	***	***	***	***
June 2024	***	***	***	***	***	***
July 2024	***	***	***	***	***	***
August 2024	***	***	***	***	***	***
September 2024	***	***	***	***	***	***
October 2024	***	***	***	***	***	***
November 2024	***	***	***	***	***	***
December 2024	***	***	***	***	***	***
January 2025	***	***	***	***	***	***
February 2025	***	***	***	***	***	***
March 2025	***	***	***	***	***	***
April 2025	***	***	***	***	***	***
May 2025	***	***	***	***	***	***
June 2025	***	***	***	***	***	***
July 2025	***	***	***	***	***	***
August 2025	***	***	***	***	***	***
September 2025	***	***	***	***	***	***

Table continued

**Table F.2 (Continued) Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 2, and margins of underselling/(overselling) sold within region excluding U.S. producer \*\*\*, by source and month**

Price in dollars per pound, quantity in pounds.

Period	Mexico sold within region: Price	Mexico sold within region: Quantity	Mexico sold within region: Margin to U.S. producers	Mexico sold within region: Margin to out-of-region U.S. producers	Mexico sold within region: Margin to all U.S. producers sold within region
January 2024	***	***	***	***	***
February 2024	***	***	***	***	***
March 2024	***	***	***	***	***
April 2024	***	***	***	***	***
May 2024	***	***	***	***	***
June 2024	***	***	***	***	***
July 2024	***	***	***	***	***
August 2024	***	***	***	***	***
September 2024	***	***	***	***	***
October 2024	***	***	***	***	***
November 2024	***	***	***	***	***
December 2024	***	***	***	***	***
January 2025	***	***	***	***	***
February 2025	***	***	***	***	***
March 2025	***	***	***	***	***
April 2025	***	***	***	***	***
May 2025	***	***	***	***	***
June 2025	***	***	***	***	***
July 2025	***	***	***	***	***
August 2025	***	***	***	***	***
September 2025	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 2.-- Non-organic flat-pack conventional (8-1 lb) fresh winter strawberry, sold to retailers, grocery stores, and other end users (e.g., food processors) per pound.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

**Figure F.2 Fresh winter strawberries: Weighted-average prices and quantities of domestic and imported product 2 sold within region excluding U.S. producer \*\*\*, by source and month**

**Price of product 2**

\* \* \* \* \*

**Volume of product 2**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires.  
Note: Product 2: Non-organic flat-pack conventional (8-1 lb) fresh winter strawberry, sold to retailers, grocery stores, and other end users (e.g., food processors) per pound

**Table F.3 Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 1, and margins of underselling/(overselling) sold nationally, excluding U.S. producer \*\*\*, by source and month**

Price in dollars per pound, quantity in pounds.

Period	U.S. price	U.S. quantity	Mexico price	Mexico quantity	Mexico margin
January 2022	***	***	***	***	***
February 2022	***	***	***	***	***
March 2022	***	***	***	***	***
April 2022	***	***	***	***	***
May 2022	***	***	***	***	***
June 2022	***	***	***	***	***
July 2022	***	***	***	***	***
August 2022	***	***	***	***	***
September 2022	***	***	***	***	***
October 2022	***	***	***	***	***
November 2022	***	***	***	***	***
December 2022	***	***	***	***	***
January 2023	***	***	***	***	***
February 2023	***	***	***	***	***
March 2023	***	***	***	***	***
April 2023	***	***	***	***	***
May 2023	***	***	***	***	***
June 2023	***	***	***	***	***
July 2023	***	***	***	***	***
August 2023	***	***	***	***	***
September 2023	***	***	***	***	***
October 2023	***	***	***	***	***
November 2023	***	***	***	***	***
December 2023	***	***	***	***	***

Table continued

**Table F.3 (Continued) Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 1, and margins of underselling/(overselling) sold nationally, excluding U.S. producer \*\*\*, by source and month**

Price in dollars per pound, quantity in pounds.

Period	U.S. price	U.S. quantity	Mexico price	Mexico quantity	Mexico margin
January 2024	***	***	***	***	***
February 2024	***	***	***	***	***
March 2024	***	***	***	***	***
April 2024	***	***	***	***	***
May 2024	***	***	***	***	***
June 2024	***	***	***	***	***
July 2024	***	***	***	***	***
August 2024	***	***	***	***	***
September 2024	***	***	***	***	***
October 2024	***	***	***	***	***
November 2024	***	***	***	***	***
December 2024	***	***	***	***	***
January 2025	***	***	***	***	***
February 2025	***	***	***	***	***
March 2025	***	***	***	***	***
April 2025	***	***	***	***	***
May 2025	***	***	***	***	***
June 2025	***	***	***	***	***
July 2025	***	***	***	***	***
August 2025	***	***	***	***	***
September 2025	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 1: Non-organic flat-pack conventional (8-1 lb) fresh winter strawberry, sold to distributors per pound.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

**Figure F.3 Fresh winter strawberries: Weighted-average prices and quantities of domestic and imported product 1 sold nationally, excluding U.S. producer \*\*\*, by source and month**

**Price of product 1**

\* \* \* \* \*

**Volume of product 1**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 1: Non-organic flat-pack conventional (8-1 lb) fresh winter strawberry, sold to distributors per pound

**Table F.4 Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 2, and margins of underselling/(overselling) sold nationally, excluding U.S. producer \*\*\*, by source and month**

Price in dollars per pound, quantity in pounds.

Period	U.S. price	U.S. quantity	Mexico price	Mexico quantity	Mexico margin
January 2022	***	***	***	***	***
February 2022	***	***	***	***	***
March 2022	***	***	***	***	***
April 2022	***	***	***	***	***
May 2022	***	***	***	***	***
June 2022	***	***	***	***	***
July 2022	***	***	***	***	***
August 2022	***	***	***	***	***
September 2022	***	***	***	***	***
October 2022	***	***	***	***	***
November 2022	***	***	***	***	***
December 2022	***	***	***	***	***
January 2023	***	***	***	***	***
February 2023	***	***	***	***	***
March 2023	***	***	***	***	***
April 2023	***	***	***	***	***
May 2023	***	***	***	***	***
June 2023	***	***	***	***	***
July 2023	***	***	***	***	***
August 2023	***	***	***	***	***
September 2023	***	***	***	***	***
October 2023	***	***	***	***	***
November 2023	***	***	***	***	***
December 2023	***	***	***	***	***

Table continued

**Table F.4 (Continued) Fresh winter strawberries: Weighted-average f.o.b. prices and quantities of domestic and imported product 2, and margins of underselling/(overselling) sold nationally, excluding U.S. producer \*\*\*, by source and month**

Price in dollars per pound, quantity in pounds.

Period	U.S. price	U.S. quantity	Mexico price	Mexico quantity	Mexico margin
January 2024	***	***	***	***	***
February 2024	***	***	***	***	***
March 2024	***	***	***	***	***
April 2024	***	***	***	***	***
May 2024	***	***	***	***	***
June 2024	***	***	***	***	***
July 2024	***	***	***	***	***
August 2024	***	***	***	***	***
September 2024	***	***	***	***	***
October 2024	***	***	***	***	***
November 2024	***	***	***	***	***
December 2024	***	***	***	***	***
January 2025	***	***	***	***	***
February 2025	***	***	***	***	***
March 2025	***	***	***	***	***
April 2025	***	***	***	***	***
May 2025	***	***	***	***	***
June 2025	***	***	***	***	***
July 2025	***	***	***	***	***
August 2025	***	***	***	***	***
September 2025	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Product 2: Non-organic flat-pack conventional (8-1 lb) fresh winter strawberry, sold to retailers, grocery stores, and other end users (e.g., food processors) per pound.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

**Figure F.4 Fresh winter strawberries: Weighted-average prices and quantities of domestic and imported product 2 sold nationally, excluding U.S. producer \*\*\*, by source and month**

**Price of product 2**

**Volume of product 2**

\* \* \* \* \*

Source: Compiled from data submitted in response to Commission questionnaires.  
Note: Product 2: Non-organic flat-pack conventional (8-1 lb) fresh winter strawberry, sold to retailers, grocery stores, and other end users (e.g., food processors) per pound.

**Table F.5 Fresh winter strawberries: Instances and quantities of underselling/overselling and the range and average of margins for sales within region excluding U.S. producer \*\*\*, by product and region**

Quantity in pounds; margins in percent

Product	Type	Number of instances	Quantity	Average margin	Min margin	Max margin
Product 1	Underselling	14	***	***	***	***
Product 2	Underselling	7	***	***	***	***
All products	Underselling	21	***	***	***	***
Product 1	Overselling	10	***	***	***	***
Product 2	Overselling	18	***	***	***	***
All products	Overselling	28	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

**Table F.6 Fresh winter strawberries: Instances and quantities of underselling/overselling and the range and average of margins for sales nationally, excluding U.S. producer \*\*\*, by product and region**

Quantity in pounds; margins in percent

Product	Type	Number of instances	Quantity	Average margin	Min margin	Max margin
Product 1	Underselling	12	***	***	***	***
Product 2	Underselling	6	***	***	***	***
All products	Underselling	18	***	***	***	***
Product 1	Overselling	12	***	***	***	***
Product 2	Overselling	19	***	***	***	***
All products	Overselling	31	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

**Table F.7 Fresh winter strawberries: Instances and quantities of underselling/overselling and the range and average of margins for sales nationally, excluding U.S. producer \*\*\*, by product and region**

Quantity in pounds; margins in percent

Product	Type	Number of instances	Quantity	Average margin	Min margin	Max margin
2022	Underselling	5	***	***	***	***
2023	Underselling	6	***	***	***	***
2024	Underselling	5	***	***	***	***
January through September 2025	Underselling	5	***	***	***	***
All periods	Underselling	21	***	***	***	***
2022	Overselling	8	***	***	***	***
2023	Overselling	8	***	***	***	***
2024	Overselling	9	***	***	***	***
January through September 2025	Overselling	3	***	***	***	***
All periods	Overselling	28	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

**Table F.8 Fresh winter strawberries: Instances and quantities of underselling/overselling and the range and average of margins for sales nationally, excluding U.S. producer \*\*\*, by product and region**

Quantity in pounds; margins in percent

Product	Type	Number of instances	Quantity	Average margin	Min margin	Max margin
2022	Underselling	4	***	***	***	***
2023	Underselling	5	***	***	***	***
2024	Underselling	5	***	***	***	***
January through September 2025	Underselling	4	***	***	***	***
All periods	Underselling	18	***	***	***	***
2022	Overselling	9	***	***	***	***
2023	Overselling	9	***	***	***	***
2024	Overselling	9	***	***	***	***
January through September 2025	Overselling	4	***	***	***	***
All periods	Overselling	31	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.



**APPENDIX G**  
**SELECTED FIRM-BY-FIRM FINANCIAL DATA**



**Table G.1 Fresh winter strawberries: Within region U.S. producers' (including Driscoll's FL) sales, costs/expenses, and profitability, by firm and period**

**Net sales quantity**

Quantity in 1,000 pounds; interim is January through September

<b>Firm</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>Interim 2024</b>	<b>Interim 2025</b>
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Sweet Life	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
Wish Farms	***	***	***	***	***
Ultra Farms	***	***	***	***	***
Mathis	***	***	***	***	***
All other within region U.S. producers	***	***	***	***	***
All within region U.S. producers	***	***	***	***	***

Table continued.

**Table G.1 (Continued) Fresh winter strawberries: Within region U.S. producers' (including Driscoll's FL) sales, costs/expenses, and profitability, by firm and period**

**Net sales value**

Value in 1,000 dollars; interim is January through September

<b>Firm</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>Interim 2024</b>	<b>Interim 2025</b>
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Sweet Life	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
Wish Farms	***	***	***	***	***
Ultra Farms	***	***	***	***	***
Mathis	***	***	***	***	***
All other within region U.S. producers	***	***	***	***	***
All within region U.S. producers	***	***	***	***	***

Table continued.

**Table G.1 (Continued) Fresh winter strawberries: Within region U.S. producers' (including Driscoll's FL) sales, costs/expenses, and profitability, by firm and period**

**COGS**

Value in 1,000 dollars; interim is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Sweet Life	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
Wish Farms	***	***	***	***	***
Ultra Farms	***	***	***	***	***
Mathis	***	***	***	***	***
All other within region U.S. producers	***	***	***	***	***
All within region U.S. producers	***	***	***	***	***

Table continued.

**Table G.1 (Continued) Fresh winter strawberries: Within region U.S. producers' (including Driscoll's FL) sales, costs/expenses, and profitability, by firm and period**

**Gross profit or (loss)**

Value in 1,000 dollars; interim is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Sweet Life	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
Wish Farms	***	***	***	***	***
Ultra Farms	***	***	***	***	***
Mathis	***	***	***	***	***
All other within region U.S. producers	***	***	***	***	***
All within region U.S. producers	***	***	***	***	***

Table continued.

**Table G.1 (Continued) Fresh winter strawberries: Within region U.S. producers' (including Driscoll's FL) sales, costs/expenses, and profitability, by firm and period**

**SG&A expenses**

Value in 1,000 dollars; interim is January through September

<b>Firm</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>Interim 2024</b>	<b>Interim 2025</b>
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Sweet Life	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
Wish Farms	***	***	***	***	***
Ultra Farms	***	***	***	***	***
Mathis	***	***	***	***	***
All other within region U.S. producers	***	***	***	***	***
All within region U.S. producers	***	***	***	***	***

Table continued.

**Table G.1 (Continued) Fresh winter strawberries: Within region U.S. producers' (including Driscoll's FL) sales, costs/expenses, and profitability, by firm and period**

**Operating income or (loss)**

Value in 1,000 dollars; interim is January through September

<b>Firm</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>Interim 2024</b>	<b>Interim 2025</b>
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Sweet Life	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
Wish Farms	***	***	***	***	***
Ultra Farms	***	***	***	***	***
Mathis	***	***	***	***	***
All other within region U.S. producers	***	***	***	***	***
All within region U.S. producers	***	***	***	***	***

Table continued.

**Table G.1 (Continued) Fresh winter strawberries: Within region U.S. producers' (including Driscoll's FL) sales, costs/expenses, and profitability, by firm and period**

**Net income or (loss)**

Value in 1,000 dollars; interim is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Sweet Life	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
Wish Farms	***	***	***	***	***
Ultra Farms	***	***	***	***	***
Mathis	***	***	***	***	***
All other within region U.S. producers	***	***	***	***	***
All within region U.S. producers	***	***	***	***	***

Table continued.

**Table G.1 (Continued) Fresh winter strawberries: Within region U.S. producers' (including Driscoll's FL) sales, costs/expenses, and profitability, by firm and period**

**COGS to net sales ratio**

Ratios in percent; interim is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Sweet Life	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
Wish Farms	***	***	***	***	***
Ultra Farms	***	***	***	***	***
Mathis	***	***	***	***	***
All other within region U.S. producers	***	***	***	***	***
All within region U.S. producers	***	***	***	***	***

Table continued.

**Table G.1 (Continued) Fresh winter strawberries: Within region U.S. producers' (including Driscoll's FL) sales, costs/expenses, and profitability, by firm and period**

**Gross profit or (loss) to net sales ratio**

Ratios in percent; interim is January through September

<b>Firm</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>Interim 2024</b>	<b>Interim 2025</b>
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Sweet Life	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
Wish Farms	***	***	***	***	***
Ultra Farms	***	***	***	***	***
Mathis	***	***	***	***	***
All other within region U.S. producers	***	***	***	***	***
All within region U.S. producers	***	***	***	***	***

Table continued.

**Table G.1 (Continued) Fresh winter strawberries: Within region U.S. producers' (including Driscoll's FL) sales, costs/expenses, and profitability, by firm and period**

**SG&A expenses to net sales ratio**

Ratios in percent; interim is January through September

<b>Firm</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>Interim 2024</b>	<b>Interim 2025</b>
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Sweet Life	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
Wish Farms	***	***	***	***	***
Ultra Farms	***	***	***	***	***
Mathis	***	***	***	***	***
All other within region U.S. producers	***	***	***	***	***
All within region U.S. producers	***	***	***	***	***

Table continued.

**Table G.1 (Continued) Fresh winter strawberries: Within region U.S. producers' (including Driscoll's FL) sales, costs/expenses, and profitability, by firm and period**

**Operating income or (loss) to net sales ratio**

Ratios in percent; interim is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Sweet Life	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
Wish Farms	***	***	***	***	***
Ultra Farms	***	***	***	***	***
Mathis	***	***	***	***	***
All other within region U.S. producers	***	***	***	***	***
All within region U.S. producers	***	***	***	***	***

Table continued.

**Table G.1 (Continued) Fresh winter strawberries: Within region U.S. producers' (including Driscoll's FL) sales, costs/expenses, and profitability, by firm and period**

**Net income or (loss) to net sales ratio**

Ratios in percent; interim is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Sweet Life	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
Wish Farms	***	***	***	***	***
Ultra Farms	***	***	***	***	***
Mathis	***	***	***	***	***
All other within region U.S. producers	***	***	***	***	***
All within region U.S. producers	***	***	***	***	***

Table continued.

**Table G.1 (Continued) Fresh winter strawberries: Within region U.S. producers' (including Driscoll's FL) sales, costs/expenses, and profitability, by firm and period**

**Unit net sales value**

Unit values in dollars per pound; interim is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Sweet Life	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
Wish Farms	***	***	***	***	***
Ultra Farms	***	***	***	***	***
Mathis	***	***	***	***	***
All other within region U.S. producers	***	***	***	***	***
All within region U.S. producers	***	***	***	***	***

Table continued.

**Table G.1 (Continued) Fresh winter strawberries: Within region U.S. producers' (including Driscoll's FL) sales, costs/expenses, and profitability, by firm and period**

**Unit COGS**

Unit values in dollars per pound; interim is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Sweet Life	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
Wish Farms	***	***	***	***	***
Ultra Farms	***	***	***	***	***
Mathis	***	***	***	***	***
All other within region U.S. producers	***	***	***	***	***
All within region U.S. producers	***	***	***	***	***

Table continued.

**Table G.1 (Continued) Fresh winter strawberries: Within region U.S. producers' (including Driscoll's FL) sales, costs/expenses, and profitability, by firm and period**

**Unit gross profit or (loss)**

Unit values in dollars per pound; interim is January through September

<b>Firm</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>Interim 2024</b>	<b>Interim 2025</b>
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Sweet Life	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
Wish Farms	***	***	***	***	***
Ultra Farms	***	***	***	***	***
Mathis	***	***	***	***	***
All other within region U.S. producers	***	***	***	***	***
All within region U.S. producers	***	***	***	***	***

Table continued.

**Table G.1 (Continued) Fresh winter strawberries: Within region U.S. producers' (including Driscoll's FL) sales, costs/expenses, and profitability, by firm and period**

**Unit SG&A expenses**

Unit values in dollars per pound; interim is January through September

<b>Firm</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>Interim 2024</b>	<b>Interim 2025</b>
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Sweet Life	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
Wish Farms	***	***	***	***	***
Ultra Farms	***	***	***	***	***
Mathis	***	***	***	***	***
All other within region U.S. producers	***	***	***	***	***
All within region U.S. producers	***	***	***	***	***

Table continued.

**Table G.1 (Continued) Fresh winter strawberries: Within region U.S. producers' (including Driscoll's FL) sales, costs/expenses, and profitability, by firm and period**

**Unit operating income or (loss)**

Unit values in dollars per pound; interim is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Sweet Life	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
Wish Farms	***	***	***	***	***
Ultra Farms	***	***	***	***	***
Mathis	***	***	***	***	***
All other within region U.S. producers	***	***	***	***	***
All within region U.S. producers	***	***	***	***	***

Table continued.

**Table G.1 (Continued) Fresh winter strawberries: Within region U.S. producers' (including Driscoll's FL) sales, costs/expenses, and profitability, by firm and period**

**Unit net income or (loss)**

Unit values in dollars per pound; interim is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Sweet Life	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
Wish Farms	***	***	***	***	***
Ultra Farms	***	***	***	***	***
Mathis	***	***	***	***	***
All other within region U.S. producers	***	***	***	***	***
All within region U.S. producers	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Note: The inclusion of Driscoll's FL's regional U.S. producer questionnaires results in some double counting of sales data for fresh winter strawberries from \*\*\* producers/growers (\*\*\*) that \*\*\* submitted their own financial results.

**Table G.2 Fresh winter strawberries: National U.S. producers' (including Driscoll's FL and Driscoll's CA) sales, costs/expenses, and profitability, by firm and period**

**Net sales quantity**

Quantity in 1,000 pounds; interim is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's CA	***	***	***	***	***
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Reiter Bros.	***	***	***	***	***
Sweet Life	***	***	***	***	***
Sierra	***	***	***	***	***
Laguna	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
All other U.S. producers	***	***	***	***	***
All U.S. producers	***	***	***	***	***

Table continued.

**Table G.2 (Continued) Fresh winter strawberries: National U.S. producers' (including Driscoll's FL and Driscoll's CA) sales, costs/expenses, and profitability, by firm and period**

**Net sales value**

Value in 1,000 dollars; interim is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's CA	***	***	***	***	***
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Reiter Bros.	***	***	***	***	***
Sweet Life	***	***	***	***	***
Sierra	***	***	***	***	***
Laguna	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
All other U.S. producers	***	***	***	***	***
All U.S. producers	***	***	***	***	***

Table continued.

**Table G.2 (Continued) Fresh winter strawberries: National U.S. producers' (including Driscoll's FL and Driscoll's CA) sales, costs/expenses, and profitability, by firm and period**

**COGS**

Value in 1,000 dollars; interim is January through September

<b>Firm</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>Interim 2024</b>	<b>Interim 2025</b>
Driscoll's CA	***	***	***	***	***
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Reiter Bros.	***	***	***	***	***
Sweet Life	***	***	***	***	***
Sierra	***	***	***	***	***
Laguna	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
All other U.S. producers	***	***	***	***	***
All U.S. producers	***	***	***	***	***

Table continued.

**Table G.2 (Continued) Fresh winter strawberries: National U.S. producers' (including Driscoll's FL and Driscoll's CA) sales, costs/expenses, and profitability, by firm and period**

**Gross profit or (loss)**

Value in 1,000 dollars; interim is January through September

<b>Firm</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>Interim 2024</b>	<b>Interim 2025</b>
Driscoll's CA	***	***	***	***	***
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Reiter Bros.	***	***	***	***	***
Sweet Life	***	***	***	***	***
Sierra	***	***	***	***	***
Laguna	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
All other U.S. producers	***	***	***	***	***
All U.S. producers	***	***	***	***	***

Table continued.

**Table G.2 (Continued) Fresh winter strawberries: National U.S. producers' (including Driscoll's FL and Driscoll's CA) sales, costs/expenses, and profitability, by firm and period**

**SG&A expenses**

Value in 1,000 dollars; interim is January through September

<b>Firm</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>Interim 2024</b>	<b>Interim 2025</b>
Driscoll's CA	***	***	***	***	***
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Reiter Bros.	***	***	***	***	***
Sweet Life	***	***	***	***	***
Sierra	***	***	***	***	***
Laguna	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
All other U.S. producers	***	***	***	***	***
All U.S. producers	***	***	***	***	***

Table continued.

**Table G.2 (Continued) Fresh winter strawberries: National U.S. producers' (including Driscoll's FL and Driscoll's CA) sales, costs/expenses, and profitability, by firm and period**

**Operating income or (loss)**

Value in 1,000 dollars; interim is January through September

<b>Firm</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>Interim 2024</b>	<b>Interim 2025</b>
Driscoll's CA	***	***	***	***	***
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Reiter Bros.	***	***	***	***	***
Sweet Life	***	***	***	***	***
Sierra	***	***	***	***	***
Laguna	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
All other U.S. producers	***	***	***	***	***
All U.S. producers	***	***	***	***	***

Table continued.

**Table G.2 (Continued) Fresh winter strawberries: National U.S. producers' (including Driscoll's FL and Driscoll's CA) sales, costs/expenses, and profitability, by firm and period**

**Net income or (loss)**

Value in 1,000 dollars; interim is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's CA	***	***	***	***	***
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Reiter Bros.	***	***	***	***	***
Sweet Life	***	***	***	***	***
Sierra	***	***	***	***	***
Laguna	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
All other U.S. producers	***	***	***	***	***
All U.S. producers	***	***	***	***	***

Table continued.

**Table G.2 (Continued) Fresh winter strawberries: National U.S. producers' (including Driscoll's FL and Driscoll's CA) sales, costs/expenses, and profitability, by firm and period**

**COGS to net sales ratio**

Ratios in percent; interim is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's CA	***	***	***	***	***
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Reiter Bros.	***	***	***	***	***
Sweet Life	***	***	***	***	***
Sierra	***	***	***	***	***
Laguna	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
All other U.S. producers	***	***	***	***	***
All U.S. producers	***	***	***	***	***

Table continued.

**Table G.2 (Continued) Fresh winter strawberries: National U.S. producers' (including Driscoll's FL and Driscoll's CA) sales, costs/expenses, and profitability, by firm and period**

**Gross profit or (loss) to net sales ratio**

Ratios in percent; interim is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's CA	***	***	***	***	***
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Reiter Bros.	***	***	***	***	***
Sweet Life	***	***	***	***	***
Sierra	***	***	***	***	***
Laguna	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
All other U.S. producers	***	***	***	***	***
All U.S. producers	***	***	***	***	***

Table continued.

**Table G.2 (Continued) Fresh winter strawberries: National U.S. producers' (including Driscoll's FL and Driscoll's CA) sales, costs/expenses, and profitability, by firm and period**

**SG&A expenses to net sales ratio**

Ratios in percent; interim is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's CA	***	***	***	***	***
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Reiter Bros.	***	***	***	***	***
Sweet Life	***	***	***	***	***
Sierra	***	***	***	***	***
Laguna	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
All other U.S. producers	***	***	***	***	***
All U.S. producers	***	***	***	***	***

Table continued.

**Table G.2 (Continued) Fresh winter strawberries: National U.S. producers' (including Driscoll's FL and Driscoll's CA) sales, costs/expenses, and profitability, by firm and period**

**Operating income or (loss) to net sales ratio**

Ratios in percent; interim is January through September

<b>Firm</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>Interim 2024</b>	<b>Interim 2025</b>
Driscoll's CA	***	***	***	***	***
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Reiter Bros.	***	***	***	***	***
Sweet Life	***	***	***	***	***
Sierra	***	***	***	***	***
Laguna	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
All other U.S. producers	***	***	***	***	***
All U.S. producers	***	***	***	***	***

Table continued.

**Table G.2 (Continued) Fresh winter strawberries: National U.S. producers' (including Driscoll's FL and Driscoll's CA) sales, costs/expenses, and profitability, by firm and period**

**Net income or (loss) to net sales ratio**

Ratios in percent; interim is January through September

<b>Firm</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>Interim 2024</b>	<b>Interim 2025</b>
Driscoll's CA	***	***	***	***	***
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Reiter Bros.	***	***	***	***	***
Sweet Life	***	***	***	***	***
Sierra	***	***	***	***	***
Laguna	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
All other U.S. producers	***	***	***	***	***
All U.S. producers	***	***	***	***	***

Table continued.

**Table G.2 (Continued) Fresh winter strawberries: National U.S. producers' (including Driscoll's FL and Driscoll's CA) sales, costs/expenses, and profitability, by firm and period**

**Unit net sales value**

Unit values in dollars per pound; interim is January through September

<b>Firm</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>Interim 2024</b>	<b>Interim 2025</b>
Driscoll's CA	***	***	***	***	***
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Reiter Bros.	***	***	***	***	***
Sweet Life	***	***	***	***	***
Sierra	***	***	***	***	***
Laguna	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
All other U.S. producers	***	***	***	***	***
All U.S. producers	***	***	***	***	***

Table continued.

**Table G.2 (Continued) Fresh winter strawberries: National U.S. producers' (including Driscoll's FL and Driscoll's CA) sales, costs/expenses, and profitability, by firm and period**

**Unit COGS**

Unit values in dollars per pound; interim is January through September

<b>Firm</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>Interim 2024</b>	<b>Interim 2025</b>
Driscoll's CA	***	***	***	***	***
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Reiter Bros.	***	***	***	***	***
Sweet Life	***	***	***	***	***
Sierra	***	***	***	***	***
Laguna	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
All other U.S. producers	***	***	***	***	***
All U.S. producers	***	***	***	***	***

Table continued.

**Table G.2 (Continued) Fresh winter strawberries: National U.S. producers' (including Driscoll's FL and Driscoll's CA) sales, costs/expenses, and profitability, by firm and period**

**Unit gross profit or (loss)**

Unit values in dollars per pound; interim is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's CA	***	***	***	***	***
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Reiter Bros.	***	***	***	***	***
Sweet Life	***	***	***	***	***
Sierra	***	***	***	***	***
Laguna	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
All other U.S. producers	***	***	***	***	***
All U.S. producers	***	***	***	***	***

Table continued.

**Table G.2 (Continued) Fresh winter strawberries: National U.S. producers' (including Driscoll's FL and Driscoll's CA) sales, costs/expenses, and profitability, by firm and period**

**Unit SG&A expenses**

Unit values in dollars per pound; interim is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's CA	***	***	***	***	***
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Reiter Bros.	***	***	***	***	***
Sweet Life	***	***	***	***	***
Sierra	***	***	***	***	***
Laguna	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
All other U.S. producers	***	***	***	***	***
All U.S. producers	***	***	***	***	***

Table continued.

**Table G.2 (Continued) Fresh winter strawberries: National U.S. producers' (including Driscoll's FL and Driscoll's CA) sales, costs/expenses, and profitability, by firm and period**

**Unit operating income or (loss)**

Unit values in dollars per pound; interim is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's CA	***	***	***	***	***
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Reiter Bros.	***	***	***	***	***
Sweet Life	***	***	***	***	***
Sierra	***	***	***	***	***
Laguna	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
All other U.S. producers	***	***	***	***	***
All U.S. producers	***	***	***	***	***

Table continued.

**Table G.2 (Continued) Fresh winter strawberries: National U.S. producers' (including Driscoll's FL and Driscoll's CA) sales, costs/expenses, and profitability, by firm and period**

**Unit net income or (loss)**

Unit values in dollars per pound; interim is January through September

Firm	2022	2023	2024	Interim 2024	Interim 2025
Driscoll's CA	***	***	***	***	***
Driscoll's FL	***	***	***	***	***
Astin	***	***	***	***	***
Florida Pacific	***	***	***	***	***
Grimes	***	***	***	***	***
Reiter Bros.	***	***	***	***	***
Sweet Life	***	***	***	***	***
Sierra	***	***	***	***	***
Laguna	***	***	***	***	***
BBI	***	***	***	***	***
Sizemore	***	***	***	***	***
All other U.S. producers	***	***	***	***	***
All U.S. producers	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Note: The inclusion of Driscoll's FL and Driscoll's CA U.S. producer questionnaires results in some double counting of sales data for fresh winter strawberries from \*\*\* and submitted their own financial results.

