

Approved: July 23, 2026

**KIWIFRUIT ADMINISTRATIVE COMMITTEE
MARKETING POLICY STATEMENT
2026-2027 CROP YEAR**

PROGRAM: Marketing Order No. 920, established 1984, amended 2010.

The Kiwifruit Administrative Committee (KAC) is required to annually consider specific areas that directly affect the successful operation of the Marketing Order. According to Section 925.50 the Committee shall submit to the Secretary of Agriculture a marketing policy report containing information relative to:

- 1) The estimated total production of kiwifruit produced within the production area;
- 2) The expected general quality and size of kiwifruit in the production area and in other areas;
- 3) The expected demand conditions for kiwifruit;
- 4) The expected shipments of kiwifruit produced in the production area and in areas outside the production area;
- 5) Supplies of competing commodities,
- 6) Trend and level of consumer income;
- 7) Other factors having a bearing on the marketing of kiwifruit; and,
- 8) The type of regulations expected to be recommended during the marketing season.

1) Estimated production of kiwifruit within the production area:

It is anticipated that the 2025/26 marketed Hayward crop will be around 8.4 million 7-pound tray equivalents (TE). Shipments of the 2025/26 crop are still being reported and will continue into the month of August.

The marketed crop of non-Hayward varieties for 2025/26 was approximately 1.8 million tray equivalents. “Non-Hayward” varieties include multiple Gold and Red varieties of the *Actinidia Chinensis* species and a green variety called Mega.

The combined estimated total shipments for all kiwifruit varieties within the production area is for approximately 10.2 million tray equivalents (3.6 million volume fill equivalents).

The preliminary 2026/27 crop estimate for non-Hayward varieties is 1.3 million tray equivalents. The 2026/27 Hayward crop is estimated at approximately 7.8 million tray equivalents making the total California kiwifruit crop estimate 9.1 million tray equivalents (3.2 million volume fill equivalents).

The 2026/27 California kiwifruit preliminary crop estimated presented to the Committee on July 23, 2026 is attached. (Addendum 1)

Figure 1. California Kiwifruit Production History Hayward

	Production (In Tray Equivalents) After repack loss	Acreage	Average Tray Equivalent/Acre
84/85	4,092,000	7,660	534
85/86	5,300,000	7,708	688
86/87	6,400,000	8,210	780
87/88	7,751,540	8,711	890
88/89	8,373,621	9,211	909
89/90	9,907,379	9,712	1,020
90/91	8,769,344	9,358	937
91/92	7,212,329	8,072	893
92/93	12,875,553	6,787	1,897
93/94	11,764,347	5,849	2,011
94/95	10,308,032	5,604	1,839
95/96	8,473,398	5,432	1,560
96/97	6,622,962	5,234	1,265
97/98	8,579,177	4,904	1,749
98/99	8,318,509	4,611	1,804
99/00	6,162,179	4,501	1,369
00/01	7,496,312	4,612	1,625
01/02	5,958,178	4,356	1,368
02/03	5,866,899	4,165	1,409
03/04	6,249,727	3,761	1,662
04/05	5,792,672	3,793	1,527
05/06	9,350,000	3,762	2,485
06/07	6,870,203	3,671	1,871
07/08	6,005,279	3,600*	1,668
08/09	5,583,402	3,600*	1,551
09/10	6,360,518	3,626	1,754
10/11	8,633,470	3,919	2,203
11/12	9,717,542	3,897	2,494
12/13	7,481,015	3,774	1,982
13/14	6,726,683	3,622	1,857
14/15	7,479,434	3,196	2,340
15/16	5,898,482	3,306	1,784
16/17	8,766,849	3,439	2,549
17/18	9,736,889	3,694	2,636
18/19	9,698,080	3,925	2,471
19/20	10,650,083	3,987	2,671
20/21	9,150,339	4,031	2,270
21/22	9,491,682	4,149	2,288
22/23	7,088,114	3,989	1,777
23/24	8,744,812	4,420	1,978
24/25	10,012,134	4,418	2,266
25/26	8,402,603	4,400	1,910

2) Expected general quality of kiwifruit in the production area:

The expected quality of California kiwifruit is excellent. There have been no adverse conditions during the growing season to negatively impact the crop. Winter chill hours were adequate, no late spring frosts, and summer temperatures have not been extreme.

All grower factors thus far have been conducive, and growers are optimistic that this will contribute to good fruit quality and a good fruit size profile at harvest.

3) Expected demand conditions for kiwifruit:

Demand for kiwifruit is expected to remain strong and continue growing in the coming years. Several factors influencing this positive outlook include:

- **Increasing health consciousness.** Growing consumer awareness about healthy eating, particularly among younger consumers, continues to boost demands for kiwifruit which is rich in vitamins, antioxidants and fiber.
- **Increased awareness and availability.** Improved availability through international trade and supermarket chains has made kiwifruit available year-round to consumers around the world.
- **Consumer preferences.** Changing consumer preferences toward natural/fresh products make kiwifruit a popular choice due to its taste and versatility in recipes.
- **Product innovation and diversification.** New kiwifruit varieties with a diversity of color and flavor such as the Gold and Red kiwifruit are attracting new consumers.
- **Rising disposable income.** Incomes are increasing globally, particularly in developing and emerging markets, allowing consumers to spend more on premium fruits such as kiwifruit.

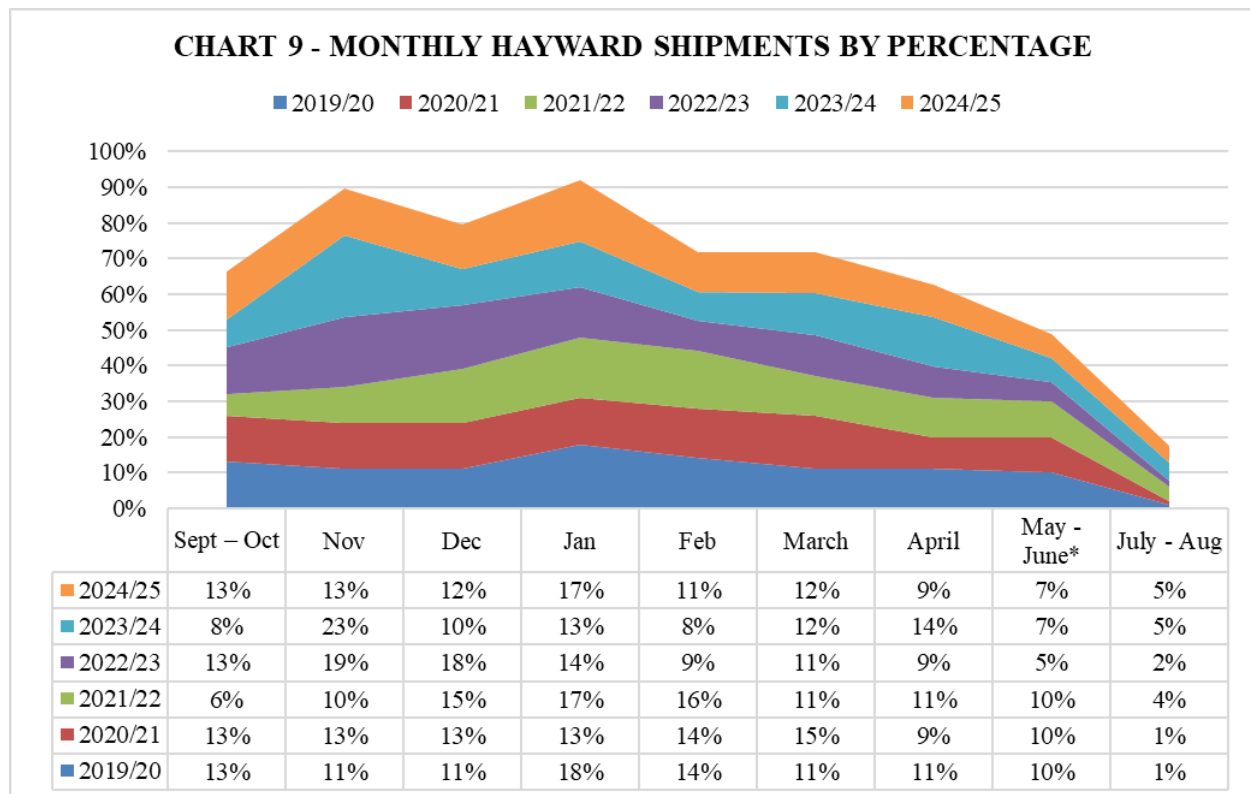
The **global kiwifruit market** size was valued at around USD 7.8 billion in 2024 and is projected to reach USD 9.98 billion by 2030. The market is estimated to grow at a CAGR of around 4.67% during the forecast period, i.e., 2025-30. (1) The market is driven by the growing consumer awareness toward maintaining a healthy lifestyle.

4) Expected shipments of kiwifruit produced in the production area and in areas outside the production area:

The preliminary crop estimate for the 2026/27 California kiwifruit crop is approximately 9.1 million 7-pound tray equivalents (3.2 million volume fill equivalents).

	2026/27 Preliminary Estimate
Hayward - TE	7,800,000
Non-Hayward - TE	1,300,000
Total Kiwifruit - TE	9,100,000
Total VF equiv	3,217,172

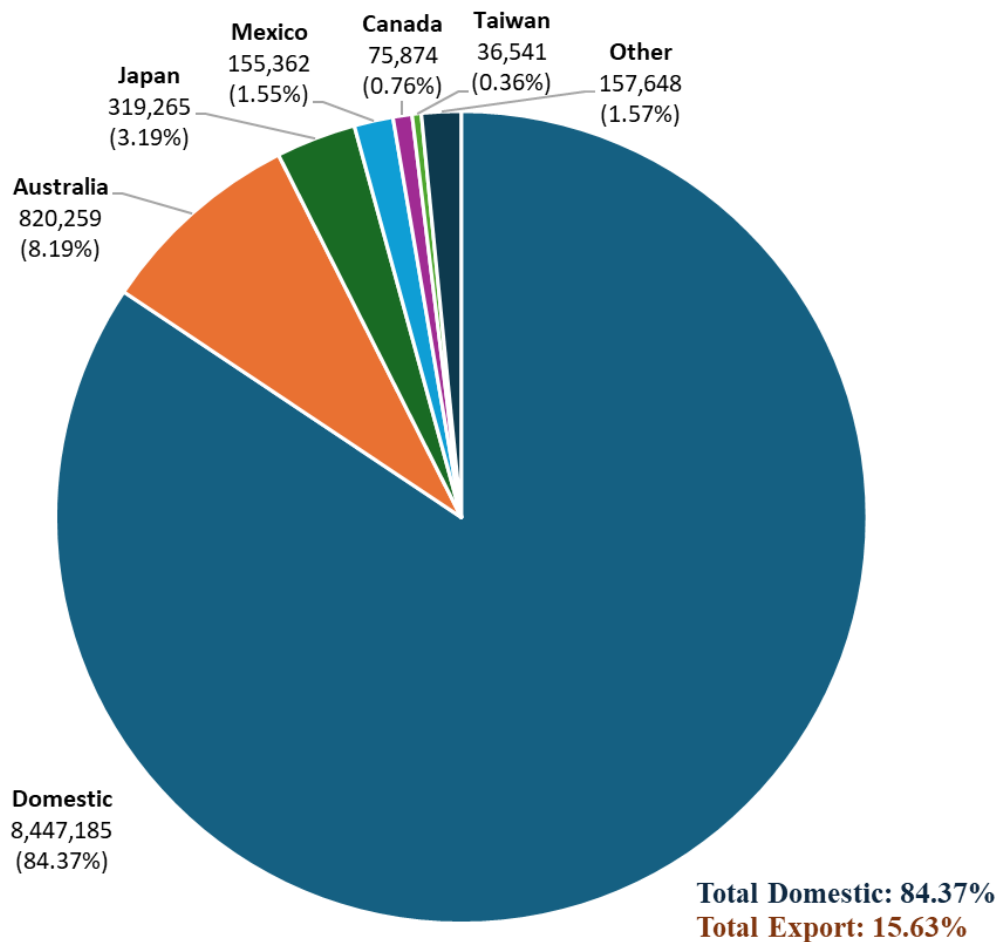
California kiwifruit is harvested beginning in late September and continuing until mid to late November. The following chart shows the percentage of Hayward shipments by month:



The largest kiwifruit importers to the United States are New Zealand, Chile, Italy, Greece and France. New Zealand and Chile are located in the Southern Hemisphere. Harvest there begins in late March, continuing until late May. Shipments from the Southern Hemisphere to the United States begin in April. The peak shipping period is late spring/summer, during the time period when supplies of California kiwifruit are lower.

Shipments of California kiwifruit are largely domestic, with approximately 84% of the crop staying in the United States.

CHART 10 - 2024/25 SHIPMENT BY DESTINATION (TE)



Kiwifruit production is concentrated in a few key regions, primarily New Zealand, Italy and China, accounting for over 80% of the global production. New Zealand is the dominant player, known for its high-quality fruit and strong brand recognition. Although China is the worlds largest producer, their kiwifruit production primarily supplies its domestic market. The International Kiwifruit Organization (IKO) is a global entity made up of kiwifruit producing counties. Conventions are held on an annual basis and information such as production and acreage data is shared. The following charts are based on information supplied by the participating countries. The production figures are listed in tonnes.

Northern Hemisphere Producing tonnes

Crop year		2019	2020	2021	2022	2023	2024	2025 Est
Sales season		2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
France	All Varieties		49,968	46,027	47,120	49,772	50,760	55,751
Greece	Gold	400	550	762	911	1,020	2,420	3,000
	Green	285,859	306,982	312,631	318,804	313,127	342,160	364,500
	All Varieties	286,259	307,532	313,393	319,715	314,147	344,580	367,500
Italy	Gold	59,143	72,414	81,546	91,837	93,814	100,912	128,142
	Green	258,891	248,887	220,616	241,567	168,229	187,553	208,817
	Red	400	500	1,020	2,200	3,005	3,970	4,352
	All Varieties	318,434	321,801	303,182	335,604	265,048	292,435	341,311
Portugal	All Varieties	44,120	45,818	55,461	52,919	48,690	38,952	60,000
USA	Gold	1,363	1,507	112	787	1,056	1,027	1,428
	Green	34,431	29,744	31,135	23,470	29,104	33,490	28,665
	Red	-	161	263	507	1,556	2,212	2,121
	All Varieties	35,794	31,411	31,509	24,764	31,716	36,729	32,214
Spain	Gold	30	265	341	562	579	720	2,598
	Green	24,508	27,613	28,654	29,154	27,530	22,566	30,456
	All Varieties	24,538	27,878	28,995	29,716	28,109	23,286	33,054
Korea	All Varieties	2,008	2,011	1,827	2,694		7,663	9,026
Sub total North Hemisphere	All Varieties	711,153	786,419	780,394	812,532	737,482	794,405	838,856

Southern Hemisphere producing tonnes

Crop year		2019	2020	2021	2022	2023	2024	2025
Sales season		2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
Argentina	Gold	40	95	353	315	330	410	725
	Green	7,300	10,500	12,420	15,225	16,490	15,865	16,475
	Red					7	10	36
	All Varieties	7,340	10,595	12,773	15,540	16,827	16,285	17,236
Chile	Gold	3,088	3,116	1,981	3,151	3,151	2,100	2,100
	Green	143,074	146,510	131,828	122,885	135,373	146,750	170,250
	All Varieties	146,162	149,626	133,809	126,036	138,524	148,850	172,350
New Zealand	Gold	269,558	314,670	366,086	385,673	338,940	465,658	595,325
	Green	263,400	255,992	286,098	235,285	152,265	231,503	268,669
	Red	177	279	281	485	1,222	5,350	11,279
	All Varieties	533,135	570,941	652,465	621,443	492,428	702,511	875,273
South Africa	Gold	180	330	690	1,554	1,733	2,100	3,850
	Red					50	150	270
	All Varieties	180	330	690	1,554	1,783	2,250	4,120
Sub total Southern Hemisphere	All Varieties	686,817	731,492	799,737	764,573	649,562	869,896	1,068,979

2026/27 - Estimated Shipments from Kiwifruit Production Areas *tonnes	
Southern Hemisphere	838,856
Northern Hemisphere (minus China)	1,068,979

Having kiwifruit available in stores year-round allows consumers to incorporate kiwifruit into their diets throughout the year, helping to make it stable, rather than a seasonal purchase.

5) Supplies of competing commodities:

In the fresh fruit market, kiwifruit competes with many other fruits that have ample supplies year-round. While kiwifruit is a noteworthy product with a steadily growing market, its market share is still relatively small compared to some of the major players.

Major produce players:

- **Citrus.** Oranges, lemons and limes represent a large segment of the fresh fruit market. Kiwifruit offers higher levels of vitamin C than oranges per serving size, but citrus fruits are a strong competitor due to widespread availability and generally lower prices.
- **Bananas.** Bananas are a leading fruit globally – consumed in large quantities. Although kiwifruit provides higher levels of potassium, bananas are generally cheaper, making them a strong competitor.
- **Apples.** Apples are easily accessible, priced lower and widely available.

Fruits with similar flavors, textures, or nutritional profiles can compete with kiwifruit, including:

- **Strawberries:** Similar sweet-tart flavor and high vitamin C content.
- **Grapes:** Specifically green grapes, offer a crisp and slightly tart alternative.
- **Pineapple:** Shares the tropical sweetness and some tartness, and contains bromelain, similar to kiwifruit.
- **Berries:** Blueberries, raspberries, and blackberries are also competitive due to their nutritional value and popularity.
- **Other Potential Competitors:** Peaches, nectarines, melons (like honeydew), and mangoes can also act as substitutes depending on consumer preference and seasonality.

Unless there are extreme weather conditions, droughts, dockworker strikes, or foodborne illness recalls, there is generally an ample supply of competing commodities in the market.

To compete effectively, kiwifruit producers focus on highlighting the fruit's unique taste and specific nutritional benefits to differentiate it from other readily available options.

6) Trend and level of consumer income:

Consumer income affects fresh produce purchases, including kiwifruit, but demand is also influenced by price, availability, health awareness, and individual preferences.

In May 2026, U.S. disposable personal income increased 0.7% in current dollars and 0.3% after adjusting for inflation. Personal consumption expenditures increased 0.7% in current dollars and 0.3% in real terms. (4)

Price remains an important consideration. USDA's Economic Research Service reported that retail fresh fruit prices in May 2026 were 2.1% higher than in May 2025 and forecast a 2.0% increase in fresh fruit prices for calendar year 2026. (5)

The Packer's Fresh Trends 2026 survey of more than 1,000 U.S. consumers found that 82% of respondents believed they were paying more for fresh fruits and vegetables than a year earlier.

Even so, 63% said their fresh produce consumption had stayed the same or increased slightly during the prior 12 months. (6)

Consumers reported managing produce costs by purchasing items on sale, buying in bulk and freezing, and cutting back on specialty and value-added items. The survey also found that 49% of respondents were eating at home more often. (6)

Younger consumers remain an important growth opportunity. Fresh Trends 2026 found that Gen Z and millennials led purchases of new, local, organic, and specialty produce, while 59% of all respondents said they preferred healthy options when the price felt right. (6)

Overall, current income growth and moderate fresh fruit inflation support a stable demand outlook. Price sensitivity remains important, but consumers continue to value the health, convenience, flavor, and versatility offered by fresh produce, including kiwifruit.

7) Other factors having a bearing on the marketing of kiwifruit:

- **Health Consciousness:** Kiwifruit's nutritional profile aligns with consumer interest in healthy, plant-based foods.
- **Variety and Taste:** While the traditional, green-fleshed Hayward variety remains popular, the Gold and Red varieties are gaining market share due to their sweeter taste and unique flavor profiles. These new varieties are now available from California kiwifruit growers.
- **Organic and Sustainable:** Growing consumer awareness of environmental and health concerns is driving the demand for organic and sustainably produced kiwifruit.
- **Part of the 2026 “Clean Fifteen”:** The Environmental Working Group's 2026 Shopper's Guide—based on its analysis of recent USDA testing data—includes kiwi among the 15 produce items with the lowest amounts of pesticide residues. (7)
- **Storage and Shelf Life:** Kiwifruit, particularly the green Hayward variety, is renowned for its exceptional storage potential. Because it can be stored for extended periods, California kiwifruit can be found in the market on almost a year-round basis.

CHART 8 - MONTHLY HAYWARD SHIPMENTS BY TRAY EQUIVALENTS						
Month	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Sept – Oct	1,366,092	1,169,121	601,963	921,545	694,947	1,348,977
Nov	1,223,319	1,171,859	984,271	1,376,829	2,026,809	1,304,950
Dec	1,155,259	1,153,894	1,413,354	1,260,706	911,924	1,241,365
Jan	1,956,688	1,233,920	1,591,495	983,778	1,138,046	1,718,496
Feb	1,470,433	1,280,043	1,471,288	610,007	689,795	1,143,794
March	1,137,048	1,345,630	1,081,499	806,217	1,046,349	1,158,974
April	1,211,763	819,554	1,062,584	626,639	1,195,516	934,484
May - June	1,074,323	905,230	905,230	373,703	599,528	685,349
July - Aug	55,157	71,088	380,000	128,692	441,898	475,745
Totals	10,650,083	9,150,339	9,491,682	7,088,114	8,744,812	10,012,134

- **Competition From Other Fruits:** Kiwifruit competes with a wide array of other fruits, some of which may be more affordable.
- **Quality and Safety Standards:** Marketing Order regulations pertaining to grade, size, maturity, and quality, along with food safety standards and EPA maximum residue limits for pesticides, impact production practices, trade, and consumer confidence.
- **Climate Change:** Extreme weather events can impact yields and quality.
- **Labor Costs:** Rising labor costs affect profitability.

8) Type of regulations expected to be recommended during the marketing season:

It is anticipated that the regulations at the start of the 2025/26 season will be the same as those in place during the 2024/25 season. There is pending informal rulemaking that KAC is awaiting USDA approval on.

On **April 9, 2024**, the KAC unanimously approved the following regulation changes:

Section 920.302 Modify Table 1 – Size Designation and Size Variation Chart by the following:

- Add 2 new sizes:
 - Size 15, defined as a maximum number of 22 pieces of kiwifruit in an 8-pound sample, 1” size variation tolerance
 - Size 12, defined as a maximum number of 19 pieces of kiwifruit in an 8-pound sample, 1” size variation tolerance
- For Size 18, increase the size variation tolerance (diameter) from ½” to 1”
- For Size 45, increase the size variation tolerance (diameter) from ¼” to 3/8”
- Redefine Size 45 as a maximum number of 56 pieces of kiwifruit in an 8-pound sample. This proposal will slightly lower the minimum size requirement for kiwifruit, except for varieties of the *Actinidia chinensis* species which remain at a minimum size 49.

Table 1 to Paragraph (a)(4)(ii)(A)—Size Designation and Size Variation Chart

Proposed changes are shown in **red**.

Size Designation	Maximum Number of Kiwifruit in a 8-Pound Sample	Size Variation tolerance (diameter) ₁
12	19	1”
15	22	1”
18 or larger	25	½” 1”
20	27	½”
23	30	½”
25	32	½”
27/28	35	½”

30	39	½”
33	43	3/8”
36	46	3/8”
39	49	3/8”
42	53	3/8”
45	55 56	¼” 3/8”
49 ₂	64	Not applicable

¹ Not applicable to Actinidia chinensis species varieties

² Applicable **only** to Actinidia chinensis species varieties

WORKS CITED

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- (2) MarkNtel Advisors. “Kiwi Fruit Market Size, Share & Growth Report, 2026–2032.” July 2026.
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<https://producebusiness.com/seven-smart-strategies-to-sell-more-kiwifruit/>
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- (5) USDA Economic Research Service. “Food Price Outlook: Summary Findings.” Updated June 25, 2026.
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- (6) The Packer. “Fresh Trends 2026: Defining the Fresh Produce Value Proposition.” January 13, 2026.
<https://www.thepacker.com/news/retail/fresh-trends-2026-defining-fresh-produce-value-proposition>
- (7) Environmental Working Group. “The Clean Fifteen.” 2026 Shopper's Guide to Pesticides in Produce. Accessed July 20, 2026.
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ADDENDUM 1

2026/2027 California Kiwifruit Preliminary Crop Estimate

CHART A: 2025/26 Crop Estimate and Estimated Year End:

	2025/26 Preliminary Estimate	2025/26 Estimated Year End
Hayward - TE	8,700,000	8,368,660
Non-Hayward - TE	1,300,000	1,801,410
Total Kiwifruit - TE	10,000,000	10,170,070
Total VF equiv	3,535,354	3,595,479

CHART B: (2026/27 Industry Estimate): For the 2026/27 kiwifruit crop, estimates were gathered from growers, packers, and handlers. This chart represents the estimated kiwifruit crop based on industry-provided estimates:

	2021/22	2022/23	2023/24	2024/25	2025/26 Estimated Year End	2026/27 Preliminary Estimate
Hayward - TE	9,177,899	6,980,995	8,584,719	10,079,378	8,368,660	7,949,768
Gold - TE	350,229	247,976	332,641	323,460	354,277	169,400
Mega - TE	314,191	303,760	420,938	468,208	544,808	550,000
Red - TE	82,685	159,693	482,809	696,750	902,325	767,800
Total Kiwifruit - TE	9,925,004	7,692,424	9,821,107	11,567,796	10,170,070	9,436,968
Total VF equiv	3,508,840	2,719,544	3,472,109	4,089,625	3,595,479	3,336,302

CHART C: (Preliminary Estimate): We propose a preliminary estimate for the Hayward crop to be 7.8 million TE (2,757,576 VF), and the non-Hayward varieties to be estimated at 1.3 million TE (459,596 VF). **The combined preliminary estimate for California kiwifruit is 9.1 million TE (3,217,172 VF).**

	2026/27 Preliminary Estimate
Hayward - TE	7,800,000
Non-Hayward - TE	1,300,000
Total Kiwifruit - TE	9,100,000
Total VF equiv	3,217,172