

Asparagus Production and Trade in Selected Countries

Fresh asparagus production in 2001/02 in 9 selected countries is estimated at 499,651 tons, up 4 percent from the previous year. Peru, the world's largest producer accounted for 39 percent of the total, followed by the United States, Mexico, Spain, Germany, Greece, and Japan. During the same period, asparagus exports from these selected countries are estimated at 153,090 tons, up 12 percent from the year earlier. During the first 8 months of 2002, U.S. exports of fresh-market asparagus totaled 12,224 tons valued at \$35 million, down 9 percent in volume and 6 percent in value, from the same time last year. Despite the decline in overall U.S. exports, shipments to Canada and Switzerland were up 6 and 40 percent, respectively, from the previous year. Reduced international prices and oversupply, caused mainly by increased competition, especially from China, are expected to force U.S. producers to cut costs and improve efficiencies in an effort to compete internationally.

United States

In 2001/02, the United States remained the world's second largest producer of fresh asparagus, after Peru. During this period, U.S. production of fresh asparagus is estimated at 65,771 tons, up slightly from the previous year. The states of California, Washington, and Michigan continue to account for over 95 percent of the fresh-market output in the United States, with the peak harvest occurring in the spring. During the first 8 months of 2002, U.S. exports of fresh green asparagus totaled 12,224 tons valued at \$35 million, down 9 percent in volume and 6 percent in value from the same period in 2001. This decline marks the second drop in exports in as many years, due mostly to a 30-percent reduction in export sales to Japan, a sluggish Asian economy, and competition from other key world suppliers.

Mexico

Asparagus production in Mexico in 2001/02 is forecast at 65,000 tons, up 1 percent from the previous year, due to good weather conditions and more efficient irrigation systems. More than 95 percent of the area devoted to asparagus production in Mexico uses pressurized irrigation systems. Sonora, the main producing state, and Baja California, account for the bulk of total production. Asparagus harvesting in these regions begins in late December and continues through early April. A second, but smaller crop is harvested from late June through September in Guanajuato. Green asparagus remains the predominant variety grown in Mexico.

Fresh asparagus exports from Mexico in 2001/02 are estimated at 55,000 tons, up 36 percent from the revised level in the previous year, due to increased international demand and a larger harvest. The United States and Japan remain Mexico's most important export markets. Reportedly, third-country competition has forced Mexican exporters to stagger shipping their product at the same time as the Peruvian and Californian producers to avoid market saturation. Mexican exporters are optimistic that international demand will improve while they continue to search for alternative markets. Memories of low asparagus prices in prior years, resulting from market saturation, still remain a top concern for Mexican producers and exporters. Sources confirm that Japanese consumers readily accept Mexican asparagus and continue to demand

high-quality Mexican product. Mexican producers and exporters hope to develop a new niche market in the European Union.

Peru

Asparagus is Peru's second most important agricultural export after coffee, accounting for about 25 percent of total agricultural exports. Asparagus producers are concerned that international demand for asparagus has reached maturation, and that growth in the near term will not be as sharp as it was in the 1990's. Peru produces asparagus for two different markets; green asparagus for the United States, and white asparagus for the European market. Green asparagus, accounting for about 40 percent of total output, is packed and exported in 5-kilogram boxes, while white asparagus is processed and exported in cans or jars.

Processed asparagus exports in 2002 are estimated at about 51,360 tons, up 6 percent from last year. During the same period, Peru's fresh asparagus exports totaled 42,000 tons, unchanged from the previous year. Peru's most important processed asparagus buyers are Spain, the Netherlands, France, Germany and Denmark. The United States continues to be Peru's best customer for fresh asparagus, accounting for over 80 percent of the total exports in 2001. Peruvian asparagus producers continue to worry about oversupply, weakened world demand, and falling prices. In addition, they continue to be concerned about competition from low-price Chinese asparagus, especially in the EU. Ninety percent of Peruvian agricultural exports, including asparagus, enter the EU duty free. Despite the 16-percent import duty assessed on Chinese asparagus, it still enters the EU cheaper than Peruvian product.

Greece

Production of fresh asparagus in Greece in 2001/02 is estimated at 31,000 tons, up 3 percent from the previous year. Greece produces both white and green asparagus, which are harvested from early February to mid-May and marketed earlier than product grown elsewhere in Europe. In Greece, the production cycle for asparagus runs about 12 years before replanting. Harvesting asparagus in Greece is labor intensive, with migrant worker costs running about U.S.\$18.00 per day. All other field practices are mechanized. Domestic consumption of asparagus in Greece is limited, fluctuating between 6 and 7 percent of the annual output.

Over 70 percent of Greek asparagus production is exported to Germany, with smaller amounts going to France, Spain, and the Netherlands. Spain also buys second quality product, mainly for canning. Greece's main competitors in the European markets are France, Spain, and the Netherlands.

United Kingdom

Asparagus production in the United Kingdom (UK) in 2001/02 is estimated at 1,980 tons, up 27 percent from the year earlier. The principle growing areas are Scotland, Norfolk, Suffolk, Cambridgeshire, Lincolnshire, Cornwall, and Kent. In recent years, UK consumers have moved away from the traditional bundles of non-trimmed spears to trimmed spears and tips, both in bundles and pre-packs. Pre-packs of baby varieties are supplied predominantly by Peru,

Thailand and Chile. Fresh asparagus imports into the UK in 2001/02 totaled 4,400 tons, down 10 percent from the previous year. UK's exports of fresh asparagus are small, generally less than 100 tons.

Spain

Production of asparagus in Spain in 2001/02 totaled 63,200 tons, up slightly from the previous year. Asparagus harvesting in Spain begins in mid-January for the extra-early varieties in Andalusia, and ends in August in the northern regions.

Consumption of asparagus in Spain increased substantially during the early 1990s, but has stabilized over the past few years. Fresh consumption in 2001/02 totaled 34,000 tons, unchanged from the previous year. Most Spanish consumers prefer fresh green asparagus for daily cooking and canned white asparagus for special occasions and for salads. In MY 2001/02, Spanish exports of fresh asparagus are estimated at 20,550 tons, up slightly from the previous year. Other EU countries are the primary markets for fresh green asparagus exports from Spain. Imports of fresh asparagus into Spain remain small, taking place mostly during the off-season months between October and January. Peru, Greece, and Morocco are the primary suppliers of fresh asparagus to Spain.

Japan

Production of fresh asparagus in Japan in 2001/02 totaled 31,500 tons, up 10 percent from the previous year, due mainly to warmer temperatures in early spring and newly planted high-yielding varieties (shift from Washington to a new variety called Welcome) that boosted this year's crop output. Japan produces asparagus from February through November, with the peak season in April through June. Hokkaido, Nagano and Nagasaki prefectures are the major regions for asparagus production. Japanese producer co-ops have been encouraging farmers to switch their production, especially from rice, to more profitable crops such as asparagus and leaf vegetables.

Japanese consumption of fresh asparagus in recent years has been fairly stable at around 50,000 tons annually. Fresh asparagus is marketed year-round in Japan with a number of foreign suppliers participating in the market. Mexican asparagus dominates the market from January to March; U.S. volume peaks from March through May; while volumes of domestic asparagus are heaviest in May and June. Asparagus from Australia is available in the fall and winter, while the Philippines ships asparagus to Japan almost year-round.

Japan's imports of U.S. asparagus from January to April 2002 totaled almost 2,100 tons, up 18 percent from the previous year. During the same period, Japanese imports of Mexican asparagus declined to 2,200 tons, down 44 percent from the year earlier. Japan's bumper crop and a weakened Japanese yen were the primary reasons for these declines.

Switzerland

In 2001/02, production of asparagus in Switzerland continues to be estimated at 200 tons, unchanged from the previous year. This output accounts for about 2 percent of domestic consumption. Switzerland is a very good market for U.S. fresh asparagus because of the Swiss preference for large-stalked asparagus. U.S. exports of fresh green asparagus to Switzerland from January to August 2002 totaled 1,011 tons, up dramatically from 720 tons shipped during the same time in 2001. The decline in 2001 was due to a strong U.S. dollar, stiff competition from EU producers, and a tariff-rate quota system. Under the latter system, imports from May 1 to June 15, the U.S. primary export season to Switzerland, are subject to a maximum duty of SF 734 (US\$440) per 100 kilograms. In 2002, Swiss imports of fresh green asparagus are estimated at 5,500 tons.

Germany

Germany is a major producer and consumer of fresh asparagus. Production of fresh asparagus in 2001/02 is estimated at 46,000 tons, up 2 percent from the previous year. German imports of fresh asparagus during this same period are estimated at 39,000 tons, up 8 percent from the previous year. Greece continues to be Germany's primary supplier of fresh asparagus. U.S. exports of fresh green asparagus to Germany remain small, with only marginal potential for growth due to strong competition from other EU suppliers.

(The FAS Attache Report search engine contains reports on the Asparagus industries for Mexico, Peru, United Kingdom, and Japan. For information on production and trade, contact Emanuel McNeil at 202-720-2083. For information on marketing contact Elizabeth Mello at 202-720-9903.)

Table 1: Fresh Asparagus Production, Supply, and Distribution in Selected Countries, Metric Tons

Country/ Year	Production	Imports	Total Supply	Exports	Domestic Consumption	For Processing
Germany						
1999/2000	44,000	30,964	74,964	500	74,464	0
2000/2001	45,000	36,003	81,003	500	80,503	0
2001/2002	46,000	39,000	85,000	500	84,500	0
Greece						
1999/2000	29,666	50	29,716	15,902	2,200	11,614
2000/2001	30,000	50	30,050	19,327	2,100	8,623
2001/2002	31,000	50	31,050	22,000	2,200	6,850
Japan						
1999/2000	26,701	24,766	51,467	0	50,197	1,270
2000/2001	28,700	22,054	50,754	0	49,474	1,280
2001/2002	31,500	20,000	51,500	0	50,000	1,500

Mexico						
1999/2000	50,425	523	50,948	43,856	7,092	0
2000/2001	64,348	452	64,800	40,521	24,279	0
2001/2002	65,000	400	65,400	55,000	10,400	0
Peru						
1999/2000	190,000	0	190,000	35,000	6,000	149,000
2000/2001	184,000	0	184,000	42,000	6,000	136,000
2001/2002	195,000	0	195,000	42,000	6,000	147,000
Spain						
1999/2000	63,500	3,676	67,176	19,189	35,987	12,000
2000/2001	63,000	3,500	66,500	20,500	34,000	12,000
2001/2002	63,200	3,550	66,750	20,550	34,000	12,200
Switzerland						
1999/2000	200	5,600	5,800	0	5,800	0
2000/2001	200	5,550	5,750	0	5,750	0
2001/2002	200	5,600	5,800	0	5,800	0
United Kingdom						
1999/2000	1,791	3,977	5,768	32	5,736	0
2000/2001	1,555	4,913	6,468	36	6,432	0
2001/2002	1,980	4,400	6,380	40	6,340	0
United States						
1999/2000	68,220	72,293	140,513	17,978	87,695	34,840
2000/2001	62,505	71,140	133,645	14,334	87,301	32,010
2001/2002	65,771	71,000	136,771	13,000	89,000	34,771
Total						
1999/2000	474,503	141,849	616,352	132,457	275,171	208,724
2000/2001	479,308	143,662	622,970	137,218	295,839	189,913
2001/2002	499,651	144,000	643,651	153,090	288,240	202,321

Source: U.S. Attaché Reports, NASS/USDA, and Eurostat.

United States Exports of Fresh and Chilled Asparagus 1/

Destinations	1997	1998	1999	2000	2001	Jan-Aug	Jan-Aug
						2001	2002
						Metric tons	
Canada	6,331	6,578	6,946	7,493	6,946	6,190	6,571
Japan	6,478	5,179	7,108	7,452	5,482	5,480	3,856
Switzerland	1,423	2,549	2,111	1,582	720	720	1,011
Taiwan	11	3	18	527	333	333	178
United Kingdom	341	506	653	139	95	95	83
Mexico	40	104	11	448	376	286	240
Other	641	675	418	337	382	352	285
Grand Total	15,265	15,594	17,265	17,978	14,334	13,456	12,224

Source: U.S. Department of Commerce, Bureau of the Census. 1/ Calendar years.

United States Imports of Fresh and Chilled Asparagus 1/

Origins	1997	1998	1999	2000	2001	Jan-Aug	Jan-Aug
						2001	2002
						Metric tons	
Mexico	21,166	29,907	36,719	38,134	33,947	29,396	31,916
Peru	12,707	14,152	22,225	29,874	33,539	10,537	13,332
Chile	2,817	2,521	3,190	2,479	1,606	23	25
Colombia	1,940	1,768	1,311	1,062	1,042	642	498
Guatemala	475	439	347	321	323	319	243
Argentina	761	844	631	235	179	0	0
Other	342	194	116	188	504	399	193
Grand Total	40,208	49,825	64,539	72,293	71,140	41,316	46,207

Source: U.S. Department of Commerce, Bureau of the Census. 1/ Calendar years.