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# Vegetables and Melons Outlook

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## Domestic Use of Vegetables and Melons Rose in 2007

In 2007, per capita net domestic use (a proxy for consumption) of all vegetables, melons, potatoes, sweet potatoes, pulse crops, and mushrooms rose 2 percent to 444 pounds. Among crops experiencing increased use were processing tomatoes, fresh potatoes, fresh onions, and sweet potatoes. However, given the sluggish economy, little change is anticipated in net domestic use of vegetables and melons during 2008.

Following a winter season where potato growers harvested 4 percent fewer acres, potato growers expect to harvest 5 percent fewer acres this spring. Although favorable weather has allowed yields to increase 1 percent from a year earlier, spring potato production is expected to decline 4 percent from a year ago. Fresh-market potato prices remain strong, running just below the highs of a year earlier and 20 percent above the average of previous 5 years.

Area expected to be planted to summer storage onions is forecast to decline 6 percent in 2008 to 104,050 acres—the lowest storage area since 1992. Given average yields this fall (storage onion yields were record-high in 2007), production of storage onions is expected to be well below a year ago, bringing improved grower prices and revenue this fall.

Contract area planted to the five leading processing vegetables (tomatoes, sweet corn, snap beans, green peas, and cucumbers) is expected to decline 2 percent from a year earlier to 1.18 million acres. To secure these acres, processors reportedly had to increase contract prices substantially in response to strong competition for available acres from field crops like corn and wheat, which are also planted by most vegetable growers.

Area planted to dry edible beans is expected to decline 8 percent this spring from last year's 1.53 million acres. In 2008/09, given a return to average yields (which would be lower than a year ago), dry bean stocks are expected to remain low and prices strong relative to their historic levels.

Despite prices more than double those of a year ago and strong world demand, area planted to dry peas, Austrian winter peas, small chickpeas, and lentils is expected to decline 4 percent this spring from last year's 1.19 million acres. Given average yields (which would be below those of 2007), production would decline about 10 percent.

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The next release is  
May 15, 2008.  
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Approved by the  
World Agricultural  
Outlook Board.

## Industry Overview

**All vegetables and melons:** In 2007, per capita disappearance (also known as net domestic use, a proxy for consumption) of all vegetables, melons, potatoes, sweet potatoes, pulse crops, and mushrooms rose 2 percent to 444 pounds. Most of this increase was due to higher processing tomato, fresh potato, and fresh onion disappearance. Given the sluggish economy, little change is anticipated in net domestic use of vegetables and melons during 2008.

**Fresh vegetables:** On a per person basis, net domestic use of fresh-market vegetables (excluding melons, potatoes, sweet potatoes, pulses, and mushrooms) rose 2 percent to 155 pounds. Fresh use rose for such crops as onions, sweet corn, celery, cabbage, carrots, pumpkins, and tomatoes, while dropping for squash, bell peppers, broccoli, and cucumbers. In 2008, fresh vegetable use is expected to decline slightly from that of a year earlier.

**Melons:** Estimated disappearance of all melons totaled a record high 8.5 billion pounds in 2007—the third consecutive annual gain. On a per capita basis, domestic disappearance of the top 3 melon crops increased 2 percent from a year earlier to 28.1 pounds, driven by gains in cantaloup and watermelon use.

**Processing vegetables:** Per capita disappearance of processing vegetables (excluding potatoes, sweet potatoes, and mushrooms) increased 3 percent to 119 pounds in 2007, as use of vegetables for canning (up 3 percent) and freezing (up 4 percent) rose. The outlook for 2008 indicates another small gain in the use of processing vegetables led by increased use of canning tomatoes and pickling cucumbers.

**Potatoes:** According to preliminary estimates, per capita disappearance of potatoes rose 2 percent in calendar 2007 to 126 pounds, with both fresh-market and processing potatoes registering gains. A slight decline in per capita use is expected in 2008 due partly to expectations for a smaller crop this fall.

**Sweet potatoes:** Despite strong export demand, the large 2007 crop pushed domestic disappearance of sweet potatoes for all uses up 14 percent to 5.2 pounds per person—the highest since 1985. Given a 3-percent increase in prospective plantings and trend yields, 2008 production could increase and produce further modest gains in both per capita use and export volume.

**Dry edible beans:** Per capita use of dry beans increased 3 percent in 2007 to 6.6 pounds—the third consecutive annual increase after reversing a string of five consecutive annual declines. Little change is currently expected in net domestic dry bean use in 2008, with supplies remaining tight and prices high.

**Dry peas and lentils:** Per capita disappearance of dry peas (excluding chickpeas) and lentils for domestic human food is estimated at 0.9 pound, down from the record high 1.2 pounds the previous year. Exports utilize more than half the annual supply of dry peas and lentils.

**Mushrooms:** For the 2007/08 season, disappearance of all mushrooms on a fresh-weight basis is expected to total 1.2 billion pounds. On a per capita basis, use of all mushrooms is projected to remain steady at 4 pounds, with a small increase in fresh-market use offsetting lower processing use.

**Potato chips:** During 2005-07, per capita disappearance of potatoes used to manufacture traditional (sliced and fried) potato chips averaged 18.1 pounds annually, up 12 percent from 1995-97.

Table 1--U.S. vegetable industry at a glance, 2005-08

Item	Unit	2005	2006	2007 1/	2008 1/
<i>Area harvested</i>	1,000 ac.	7,128	7,264	7,020	6,784
<i>Vegetables:</i>					
Fresh & melons	1,000 ac.	1,916	1,944	1,943	1,945
Processing	1,000 ac.	1,270	1,257	1,251	1,248
Potatoes	1,000 ac.	1,087	1,122	1,129	1,090
Dry beans	1,000 ac.	1,534	1,538	1,479	1,333
Other 2/	1,000 ac.	1,321	1,404	1,218	1,169
<i>Production</i>	Mil. cw t	1,281	1,308	1,370	1,315
<i>Vegetables:</i>					
Fresh & melons	Mil. cw t	472	483	494	473
Processing	Mil. cw t	314	318	355	348
Potatoes	Mil. cw t	424	441	449	428
Dry beans	Mil. cw t	27	24	25	22
Other 2/	Mil. cw t	44	41	46	44
<i>Crop value</i>	\$ mil.	15,906	17,162	17,962	18,600
<i>Vegetables:</i>					
Fresh & melons	\$ mil.	9,829	10,726	10,910	11,200
Processing	\$ mil.	1,255	1,341	1,605	1,750
Potatoes	\$ mil.	2,991	3,226	3,198	3,350
Dry beans	\$ mil.	516	556	677	720
Mushrooms	\$ mil.	909	889	956	970
Other 2/	\$ mil.	406	424	616	610
<i>Unit value 3/</i>	\$/cw t	12.42	13.12	13.11	14.15
<i>Vegetables:</i>					
Fresh & melons	\$/cw t	20.82	22.23	22.10	23.70
Processing	\$/cw t	3.99	4.21	4.52	5.04
Potatoes	\$/cw t	7.06	7.33	7.12	7.83
Dry beans	\$/cw t	18.50	22.10	26.40	32.21
Other 2/	\$/cw t	9.29	10.23	13.29	13.82
<i>Trade</i>					
<i>Imports</i>	\$ mil.	6,607	7,284	7,927	8,395
<i>Vegetables:</i>					
Fresh & melons	\$ mil.	3,668	4,091	4,431	4,700
Processing 4/	\$ mil.	1,587	1,746	1,921	2,000
Potatoes & products	\$ mil.	787	856	908	950
Dry beans	\$ mil.	82	84	107	130
Other 5/	\$ mil.	483	507	560	615
<i>Exports</i>	\$ mil.	3,899	4,234	4,556	4,820
<i>Vegetables:</i>					
Fresh & melons	\$ mil.	1,515	1,625	1,737	1,825
Processing 4/	\$ mil.	828	861	943	1,000
Potatoes & products	\$ mil.	841	950	1,045	1,110
Dry beans	\$ mil.	160	211	203	195
Other 5/	\$ mil.	555	588	627	690
<i>Per capita use</i>	Pounds	441	434	444	443
<i>Vegetables:</i>					
Fresh & melons	Pounds	174	179	183	182
Processing	Pounds	126	116	118	120
Potatoes & products	Pounds	126	123	126	125
Dry beans	Pounds	6	6	7	7
Other 2/	Pounds	9	10	10	10

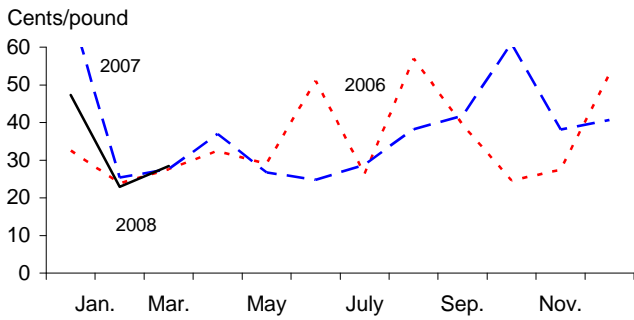
1/ ERS forecasts. 2/ Includes sweet potatoes, dry peas, lentils, and mushrooms (except for crop value). 3/ Ratio of total value to total production. 4/ Includes canned, frozen, and dried. Excludes potatoes, pulses, and mushrooms. 5/ Other includes mushrooms, dry peas, lentils, sweet potatoes, and vegetable seed. All trade data are on a calendar-year basis.

Sources: Derived by ERS from data of USDA, National Agricultural Statistics Service, *Crop Production, Acreage, Agricultural Prices, Crop Values, Mushrooms, and Potatoes*; and from U.S. trade data of the U.S. Dept. of Commerce, U.S. Census Bureau.

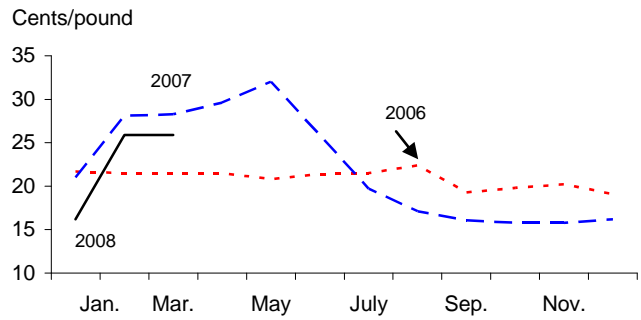
Figure 1

**Point-of-first-sale (farm) price for fresh-market vegetables**

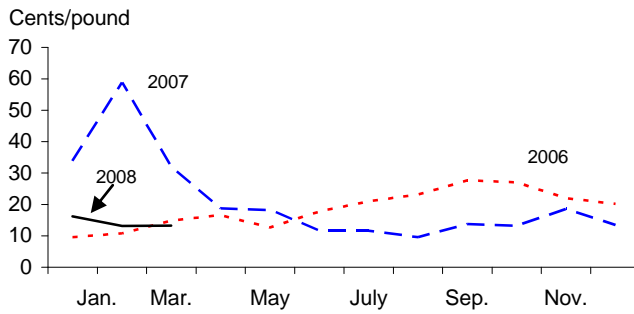
**Broccoli**



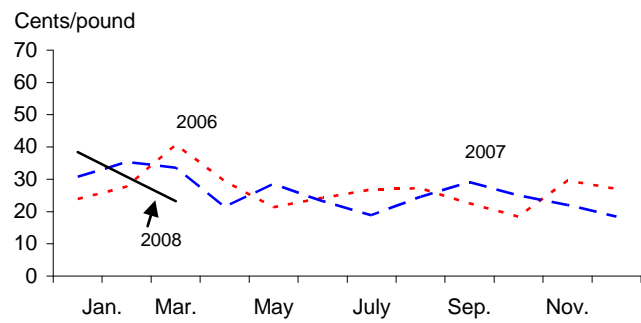
**Carrots**



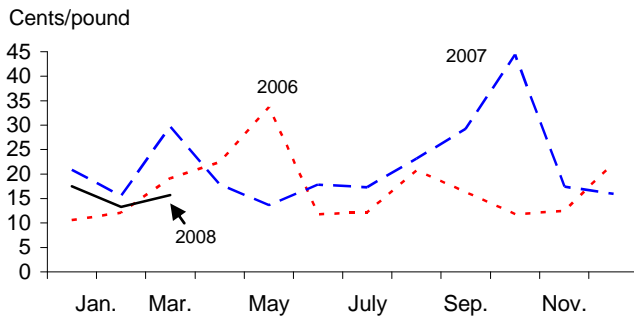
**Celery**



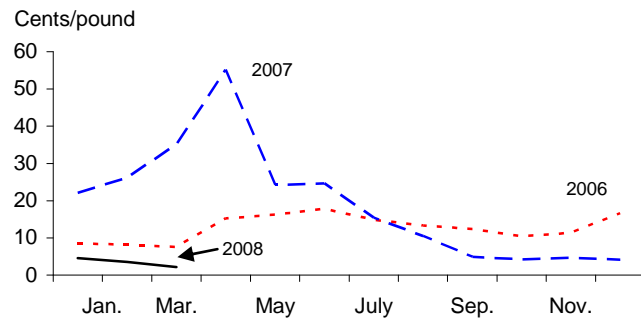
**Cucumbers**



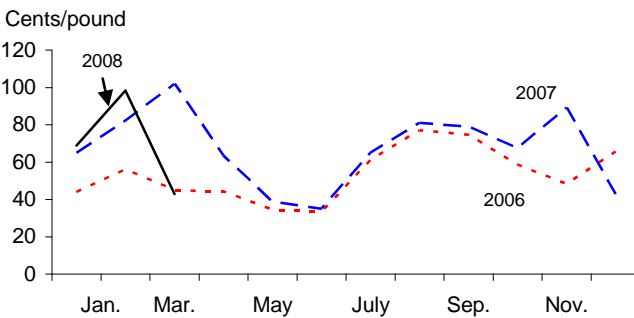
**Head lettuce**



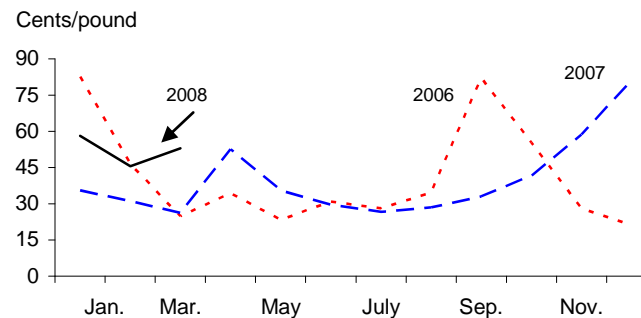
**Onions**



**Snap beans**



**Tomatoes**



Source: USDA, National Agricultural Statistics Service, *Agricultural Prices*.

## Fresh-Market Vegetables

### Spring Acreage Down

Excluding asparagus, onions, and melons, fresh-market area for harvest for 11 selected vegetables was forecast to decline 1 percent to 203,300 acres this spring (largely April-June). Prospective area was down for 6 of the 11 crops with the greatest percentage declines for tomatoes, cauliflower, and bell peppers (table 2). California, which accounts for more than half of spring vegetable area, expects to harvest 1 percent fewer acres, with much of the reduction in this State due to tomatoes, head lettuce, and carrots.

Weather during most of the growing season has been favorable in California and few pest or disease problems have been noted. With the possible exception of celery, normal yields are expected for most crops. Mandated water rationing (to ensure sufficient river flow for the endangered Delta Smelt) in the early spring growing area around Bakersfield-Huron prompted some growers to adjust planting and harvest schedules and/or move their early spring operations to other areas of the State. The industry does not anticipate any disruption in market volume. Also, the supply of transplanting and harvest labor may be temporarily improved in some areas this spring because of the slowdown in the economy.

Florida, where growth of spring vegetables was slowed by frosty, windy weather in late March, is expected to harvest nearly one-third of spring area for the 11 selected crops. Florida's area is expected to drop 1 percent from a year ago due to lower area for tomatoes (down 13 percent) and bell peppers (down 4 percent). Area for tomatoes, which annually accounts for about one-third of Florida's \$1.6 billion in vegetable cash receipts, is expected to decline to 15,000 acres—the lowest spring tomato area since 2000. Lower fresh-market tomato area, which likely reflects strong competition from imports and hothouse tomatoes, is also expected in California. Acreage of sweet corn is up 6 percent in Florida, with good quality and

Table 2--Spring-season fresh-market vegetable area 1/

Item	2005	2006	2007	2008 f	Change
					2007-08 2/
					----- Acres -----
					Percent
Snap beans	22,200	22,200	20,700	20,200	-2
Broccoli	33,000	34,500	35,000	36,000	3
Cabbage	7,700	7,000	6,900	7,900	14
Carrots	19,100	18,600	16,400	15,900	-3
Cauliflower	9,800	8,500	8,200	7,800	-5
Celery	5,100	5,600	5,700	6,000	5
Sweet corn	32,500	33,000	32,500	34,700	7
Cucumbers	7,200	7,200	7,200	7,200	0
Head lettuce	34,600	34,300	37,200	36,000	-3
Bell pepper	8,000	7,600	7,400	7,100	-4
Tomatoes	27,500	28,500	27,900	24,500	-12
Subtotal	206,700	207,000	205,100	203,300	-1
Onions 2/	36,000	34,600	31,000	28,230	-9
Asparagus 2/ 3/	49,300	43,200	38,200	34,100	-11
Total	292,000	284,800	274,300	265,630	-3

f = Forecast area.

1/ Selected crops for harvest largely during April-June. Excludes melons. 2/ Harvested area except estimated area for harvest in 2008. 3/ Includes area destined for processing.

Source: USDA, National Agricultural Statistics Service, *Vegetables*.

Table 3--Selected U.S. fresh-market vegetable shipments 1/

Item	Annual 2007	February 2008	March		Change previous: 2/	
			2007	2008	Month	Year
	-----1,000 cwt-----				Percent	
Asparagus	3,621	444	645	540	22	-16
Snap beans	3,343	282	344	381	35	11
Broccoli	9,538	1,002	874	888	-11	2
Cabbage	12,707	1,117	1,627	1,586	42	-3
Cantaloup	28,284	1,299	2,209	1,970	52	-11
Carrots	9,762	798	825	908	14	10
Cauliflower	3,944	376	290	343	-9	18
Celery	16,487	1,427	1,518	1,508	6	-1
Sweet corn	11,262	587	654	685	17	5
Cucumbers	15,876	1,292	1,561	1,647	27	5
Greens	2,391	222	278	243	9	-13
Head lettuce	34,969	2,592	3,105	2,706	4	-13
Romaine	15,455	1,163	1,521	1,206	4	-21
Leaf lettuce	4,215	339	464	355	5	-23
Onions, dry bulb	48,320	4,093	3,605	3,831	-6	6
Onions, green	2,931	327	360	335	2	-7
Peppers, bell	17,860	1,490	1,517	1,713	15	13
Peppers, chile	6,094	580	510	492	-15	-4
Squash	7,008	848	827	812	-4	-2
Tomato, round	28,293	2,400	2,675	2,364	-2	-12
Tomato, roma	11,849	1,359	1,507	1,288	-5	-15
Tomato, ghouse 3/	10,720	987	912	1,123	14	23
Tomato, small 4/	4,601	470	449	407	-13	-9
Watermelon	39,909	913	1,172	1,445	58	23
Selected total	349,439	26,410	29,449	28,773	9	-2

1/ Data for 2008 are preliminary. Includes domestic and imported product. 2/ Change in March 2008. 3/ Includes all types of tomatoes produced under cover. 4/ Includes cherry and grape.

Source: USDA, Agricultural Marketing Service, *Fruit and Vegetable Market News*.

yields expected this spring. Per capita use of fresh-market sweet corn has been trending higher over the past several years on improved quality and varieties.

Assuming continued favorable growing weather, yields should be improved from a year earlier, which should at least offset the effect of reduced area. Given adequate domestic supplies, strong import supplies, and sluggish demand due to the slow economy, U.S. spring-season grower/shipper prices for commercial fresh vegetables are expected to average at or below a year earlier. Grower/shipper prices this spring are expected to average lower for crops such as onions, carrots, and sweet corn while averaging higher for lettuce, broccoli, and cauliflower.

### ***Winter Volume Up, Prices Down***

Winter fresh-market vegetable shipment volume (domestic plus import) was estimated to be up less than 1 percent from a year earlier. Stronger volume for artichokes, broccoli, onions, peppers, and tomatoes outweighed reduced shipments for lettuce, radishes, squash, sweet corn, and cucumbers. Larger supplies and tepid demand exerted downward pressure on most fresh-market shipping-point prices during the January-March quarter. As a result, winter-quarter farm prices (prices received at the point of first sale) for fresh-market vegetables declined 27 percent from the weather-driven highs of a year earlier.

Despite lower grower prices for fresh-market vegetables, continued strong fresh potato and tomato prices (the two most heavily weighted items in the vegetable

Table 4--Fresh vegetables: Consumer and producer price indexes

Item	2007	2008		Change previous:	
	March	Feb.	March	Month	Year
	----- Index -----			---- Percent ----	
<b>Consumer Price Indexes (1982/84=100)</b>					
Fresh vegetables	302.4	305.0	301.5	-1.2	-0.3
Potatoes	276.0	286.3	285.4	-0.3	3.4
Tomatoes, all	291.9	329.6	345.1	4.7	18.2
Lettuce, all	287.6	282.6	278.3	-1.5	-3.2
Other vegetables	324.9	313.8	303.3	-3.3	-6.6
<b>Producer Price Indexes (1982=100)</b>					
Fresh vegetables (excl. potatoes)	222.4	160.8	194.1	20.7	-12.7
Beets 1/	126.3	126.2	131.8	4.4	4.4
Cabbage 1/	223.8	163.5	159.4	-2.5	-28.8
Eggplant 1/	344.9	214.5	376.3	75.4	9.1
Greens 1/	139.2	152.0	151.9	-0.1	9.1
Lettuce	266.7	113.4	121.5	7.1	-54.4
Onions, green 1/	182.3	343.2	317.9	-7.4	74.4
Onions, dry bulb	434.0	83.5	86.3	3.4	-80.1
Peppers, green 1/	239.9	304.2	395.5	30.0	64.9
Radishes 1/	246.7	286.5	282.9	-1.3	14.7
Spinach 1/	362.4	435.8	359.1	-17.6	-0.9
Squash 1/	238.3	131.0	212.7	62.4	-10.7
Tomatoes	153.2	223.5	409.5	83.2	167.3

1/ Index base is December 1991=100.

Source: U.S. Dept. of Labor, Bureau of Labor Statistics (<http://www.bls.gov/data/home.htm>).

retail price index) and rising transportation and marketing costs, pushed first-quarter retail prices for all fresh vegetables up 2 percent from a year earlier. Fresh retail prices had risen 5 percent during the first quarter of 2007 due largely to the severe western freeze.

According to the *USDA Market News* report on advertised retail prices at major retail supermarket outlets, average advertised prices for selected vegetables during March and the first 2 weeks of April 2008 were as follows:

- asparagus rose from \$2.23/lb in March to \$2.40/lb in April;
- green beans fell from \$1.42/lb in March to \$1.26/lb in April;
- baby carrots were steady at \$1.41/lb in March and April;
- zucchini squash rose from \$1.16/lb in March to \$1.20/lb in April;
- hothouse tomatoes on the vine fell from \$2.39/lb in March to \$2.30/lb in April;
- red bell peppers fell from \$2.93/lb in March to \$2.41/lb in April;

### ***Low Prices Discourage Storage Onion Area***

Area expected to be planted to summer storage onions is forecast to decline 6 percent in 2008 to 104,050 acres—the lowest storage area since 1992. California plants the greatest area to storage onions annually, but the majority of this area is devoted to processing uses (largely dehydration). Storage onion area in California is expected to fall 1 percent to 31,500 acres this summer. Given normal weather and average yields this fall (storage onion yields were record-high in 2007), production of storage onions outside of California is expected to be down 16 to 20 percent from a year ago. This would be the smallest storage crop since 1998 but will likely bring improved grower prices and revenue this fall.

Table 5—U.S. quarterly grower (point-of-first-sale) prices, 2007-08

Commodity	2007				2008 *			Change 1st Q 1/ Percent
	First	Second	Third	Fourth	First	Second	Third	
	-----Cents/pound-----							
Asparagus	107.00	95.20	--	--	--	100.00	--	--
Broccoli	40.93	29.47	36.27	46.60	32.87	34.00	35.00	-19.7
Cantaloup	--	20.40	12.80	34.50	--	20.00	14.00	--
Carrots	25.80	29.17	17.63	15.93	22.67	23.00	19.75	-12.1
Cauliflower	42.17	35.50	25.80	41.73	42.07	38.00	29.00	-0.2
Celery	41.57	16.23	11.68	15.13	14.23	16.00	13.75	-65.8
Sweet corn	27.07	21.43	22.73	25.37	27.27	19.00	21.00	0.7
Cucumbers	33.23	24.37	24.20	21.83	30.80	23.25	22.75	-7.3
Lettuce, head	22.00	16.40	23.20	25.93	15.50	18.00	17.00	-29.5
Onions, dry bulb	27.77	34.67	10.27	4.34	3.40	18.00	12.00	-87.8
Snap beans	83.07	45.80	75.03	66.57	70.03	44.00	65.00	-15.7
Tomatoes, field	31.03	39.27	29.47	60.50	52.23	41.00	36.00	68.3
All vegetables 2/	1,192	1,020	951	1,110	869	970	925	-27.1

-- = not available. \* = ERS forecast. 1/ Change in 1st-quarter 2008 over 1st-quarter 2007.

2/ Price index with base period of 1910-14 (the period when the index equaled 100).

Source: Derived by ERS from USDA, National Agricultural Statistics Service, *Agricultural Prices*.

Storage onions, which are harvested in late summer and early fall and marketed into the following spring, account for about 70 percent of annual U.S. onion production. The top five storage onion States during 2005-07 were California, Washington, Oregon, Idaho, and Colorado. With extremely low prices for the 2007 storage crop, continued uncertainty over labor availability, and record high prices for alternative crops such as corn, soybeans, and wheat, growers decided to reduce onion area in 2008.

Bulb onion prices moved from one extreme to the other over the past year. With a large crop last fall and continued strong import volume, fresh bulb onion prices this winter (January-March) averaged \$3.40/cwt—down 88 percent from the extreme highs of a year earlier and 58 percent below 2 years ago. With storage onion supplies still available, spring-season onion growers entered a very poor market in April. However, with average yields (which would be about the same as a year earlier), production this spring could be as much as one-tenth below that of last spring. As a result, grower prices for spring onions are expected to reverse the lows experienced this past winter but remain below the highs reached last year.

### ***Per Capita Use Up in 2007, Steady in 2008***

According to preliminary data, disappearance (also known as net domestic use, a proxy for consumption) of fresh-market vegetables (excluding potatoes, melons, sweet potatoes, dry pulses, and mushrooms, which are each analyzed by ERS as separate markets) rose 3 percent to 46.7 billion pounds in 2007. On a per person basis, use of fresh vegetables increased 2 percent to about 155 pounds (table 6). Including melons, per capita fresh use was up 4 pounds to about 183 pounds in 2007 and is decline slightly (1 pound) in 2008. Including estimates for melons, fresh potatoes, sweet potatoes, and fresh mushrooms, per capita use of all fresh vegetables totaled 229.8 pounds in 2007, up 3 percent from a year earlier. Little change is currently expected in 2008 due to an uncertain economy during the first half of the year.



Table 6--Fresh-market vegetables: Per capita disappearance (net domestic use) 1/

Item	Average					
	1999-2003	2004	2005	2006	2007	2008f
	----- Pounds/person -----					
Head lettuce	23.22	21.25	21.08	20.21	20.24	20.12
Tomatoes 3/	19.41	19.98	20.22	19.94	20.29	20.13
Onions 2/	18.93	21.63	21.07	19.83	21.69	21.01
Carrots	9.02	8.84	8.79	8.74	8.95	8.57
Sweet corn	9.16	9.22	8.85	8.64	9.13	8.96
Cabbage	8.23	8.33	8.10	8.21	8.58	8.58
Other lettuce	8.93	9.74	10.62	15.02	15.12	15.30
Bell pepper	6.81	6.97	7.09	7.02	6.76	6.82
Cucumbers	6.43	6.46	6.33	6.35	6.31	6.40
Celery	6.36	6.23	5.92	6.08	6.38	6.36
Broccoli	5.65	5.57	5.64	6.15	6.03	6.14
Squash	4.38	4.47	4.74	5.03	4.46	4.54
Pumpkins	4.22	4.84	5.04	4.80	5.14	5.18
Garlic, all	2.65	2.57	2.44	2.84	2.95	2.99
Snap beans	2.03	1.89	1.81	2.13	2.19	2.06
Cauliflower	1.60	1.56	1.51	1.71	1.73	1.75
Spinach	1.32	2.02	2.49	2.02	2.04	1.98
Asparagus	0.96	1.12	1.12	1.13	1.14	1.17
Others 1/	4.06	5.53	5.59	5.70	5.59	5.71
Subtotal	143.37	148.22	148.45	151.55	154.72	153.77
Potatoes	46.50	45.81	42.44	37.27	39.20	40.88
Total	189.87	194.03	190.89	188.82	193.92	194.65

f = ERS forecast. 1/ Excludes melons, mushrooms, and sweet potatoes. 2/ Fresh-market dry bulb onions. 3/ Includes both domestic and imported hothouse tomatoes.

Source: Estimates developed by USDA, Economic Research Service.

In 2007, net domestic use increased the most for onions, cauliflower, pumpkins, sweet corn, celery, cabbage, and garlic. Per capita use declined for items such as squash, artichokes, eggplant, bell peppers, and broccoli. In 2008, per capita fresh-vegetable use (excluding potatoes and melons) is expected to decline slightly as higher use of squash, broccoli, cucumbers, eggplant, and leaf/romaine lettuce, is outweighed by potential reductions for onions, carrots, snap beans, and head lettuce. Consumer interest in spinach remains steady at the 2004 and 2006 level of around 2 pounds per person but has yet to return to the strong 2005 levels. With fresh-market vegetable use expected to remain relatively steady in 2008, per capita disappearance of fresh spinach is projected to again remain around 2 pounds per person in 2008.

### ***Imports and Exports Rise***

During the first 2 months of 2008, the volume of fresh vegetable (excluding potatoes, mushrooms, and melons) imports increased 8 percent from a year earlier (table 7). The value of imports during this time rose 11 percent from a year earlier. Although the value of imports from Canada fell 10 percent to \$62 million, the value of fresh vegetable imports from Mexico rose 12 percent to \$886 million. Within the tomato category, greenhouse-grown product continued its strong growth, rising 39 percent during the first 2 months of the year. Greenhouse tomatoes accounted for nearly a third of the tomatoes imported compared with about one-fourth a year earlier. In addition to tomatoes, import volume increased for most of the major commodities, with the exception of squash, dry bulb onions, and sweet peppers. The decline registered for sweet peppers is uncertain because of changes in the trade

codes this January which split out sweet and hot peppers from two general capsicum pepper codes. One code previously thought to be mostly sweet peppers contained a greater volume of chile peppers than sweet peppers during January and February. Because of the greater specificity provided by the new codes, it appears that reported sweet pepper imports could be lower in 2008, while chile pepper imports will be larger than a year earlier.

Aided by the weak dollar, and improved supplies this winter, January-February export volume of fresh-market vegetables rose 2 percent compared with the first 2 months of 2007 (table 7). The quantity of fresh vegetables shipped to Canada, the leading foreign market, was up 3 percent, while improved weather in Mexico this year led to a 36 percent drop in demand for U.S. fresh vegetables. The volume of exports to Japan (up 39 percent) and the United Kingdom (up 89 percent) have each increased early in 2008. Combined, these four nations have accounted for 95 percent of U.S. fresh vegetable export volume so far this year. During the first 2 months of 2008, U.S. export volume declined for such items as onions, head lettuce, and celery and was outweighed by increased shipments of leaf/romaine lettuce, carrots, broccoli, and tomatoes.

Table 7--Selected fresh-market vegetable trade volume, 2006-08 1/

Item	2007	January - February			Change
	Annual	2006	2007	2008	2007-08
	----- 1,000 cwt -----				Percent
<b>Exports, fresh:</b>					
Onions, dry bulb	5,509	1,198	960	782	-19
Lettuce, head	3,523	675	514	479	-7
Lettuce, other	4,522	828	753	784	4
Tomatoes	3,545	397	518	546	5
Broccoli	3,107	526	460	507	10
Carrots	2,572	424	372	479	29
Celery	2,588	483	520	498	-4
Other	9,827	1,870	1,728	1,887	9
Total	35,191	6,400	5,825	5,961	2
<b>Imports, fresh:</b>					
Tomatoes, all	23,607	5,938	5,528	6,179	12
Cucumbers	10,125	2,510	2,496	2,922	17
Onions, dry bulb	9,025	1,264	1,538	1,432	-7
Peppers, sweet	7,264	2,276	1,921	1,117	-42
Squash 2/	5,657	1,359	1,513	1,419	-6
Peppers, chile	5,633	863	811	1,903	135
Asparagus, all	2,735	602	603	748	24
Other	23,357	4,099	4,846	5,157	6
Total	87,403	18,910	19,257	20,877	8

1/ Excludes melons, potatoes, mushrooms, dry pulses, and sweet potatoes. 2/ Excludes chayote.

Source: Prepared by ERS using data from U.S. Department of Commerce, U.S. Census Bureau.

## Melons

### *Spring Area for Harvest Lower*

Melon area for harvest during the spring-season (April-July) is expected to be down 2 percent from a year earlier (table 8). Acreage is expected to be down 4 percent for cantaloup and 1 percent for watermelon, with honeydew area unchanged. The largest acreage reduction for cantaloup is expected to be in Arizona (down 12 percent), the State with the greatest spring acreage. Florida, the leading spring watermelon producer, expects to harvest 2 percent fewer acres. A light early spring frost and windy weather damaged some early plantings in Florida, but growers were able to reset new plants. Otherwise, spring-season growing weather and crop condition was reported to be generally favorable in most growing regions.

Given minimal frost damage and average yields, spring melon output and market shipments should be at or above that of a year earlier. Melon shipments during the spring of 2007 declined 4 percent from a year earlier due to lower yields caused by drought and the Easter freeze in southeastern States. Although rainfall in Georgia remains in deficit, topsoil moisture has improved this spring, allowing growers there to increase cantaloup area 22 percent. Given continued modest import growth, spring-season melon prices are expected to average below the relatively strong levels of a year earlier. This past winter, wholesale melon prices averaged more than a fourth above a year earlier due to reduced import volume and good demand.

### *Per Capita Disappearance Up in 2007*

In 2007, domestic disappearance (also known as net domestic use, which is a proxy for consumption) of melons totaled a record nearly 8.5 billion pounds—a 3-percent rise from a year earlier. Disappearance includes both domestically produced melons and net imports. On a per capita basis, disappearance of the top three melons totaled 28.1 pounds in 2007. Due to a lack of data, this measure does not account for the domestic production of miscellaneous melons such as Crenshaw and casaba.

In 2007, per capita use of watermelon increased for the third consecutive year. Watermelon use was estimated to be 16.2 pounds per person, up 2 percent from a year earlier and the highest since 1996. With both domestic production and imports rising in 2007, per capita use of cantaloup increased 3 percent to 9.9 pounds—still well below the 1999 record high of 11.4 pounds. Reduced production pulled per capita use of honeydew melons down 4 percent to 2 pounds. Use of honeydew has been relatively steady over the past 15 years averaging about 2.1 pounds so far

Table 8--Spring-season fresh-market melon area 1/

Item	2005	2006	2007	2008 f	Change
					2007-08 2/
----- Acres -----					Percent
Cantaloup	31,700	31,600	31,400	30,100	-4
Honeydew	4,100	3,900	3,850	3,850	0
Watermelon	40,400	38,700	38,800	38,500	-1
Total	76,200	74,200	74,050	72,450	-2

f = NASS forecast area for harvest.

1/ Selected crops for harvest largely during April-June.

Source: USDA, National Agricultural Statistics Service, *Vegetables*.

during the 2000s. In the case of other melons, ERS estimates suggest that melons such as casaba, Crenshaw, and other muskmelons account for another 1 pound per person of net domestic use.

Given year-round consumer demand for melons and virtually no domestic production during the winter, imports have continued to rise. The import share of domestic disappearance of all melons was estimated to be 25 percent in 2007—up from 24 percent in 2006 and 21 percent in 2001. In 2007, imports accounted for 34 percent of cantaloup consumption—about the same as the average share during the 2000s, but up from the 27 percent average of the 1990s. The import share of watermelon has been rising since the early 2000s (when it was 11 percent), reaching 18 percent in 2007. The popularity of seedless and personal-sized melons has likely played a role in the recent rise in imports.

During the first 2 months of 2008, melon import volume was up 6 percent from a year earlier led by seedless watermelon (up 29 percent) and miscellaneous melons (up 15 percent). The leading melon shippers during those 2 months were Honduras (32 percent of all melon volume), Mexico (24 percent), Guatemala (23 percent), and Costa Rica (20 percent). In 2007, melon import volume increased 5 percent to a record 2.34 billion pounds, with seedless watermelon accounting for 731 million pounds—31 percent of total volume.

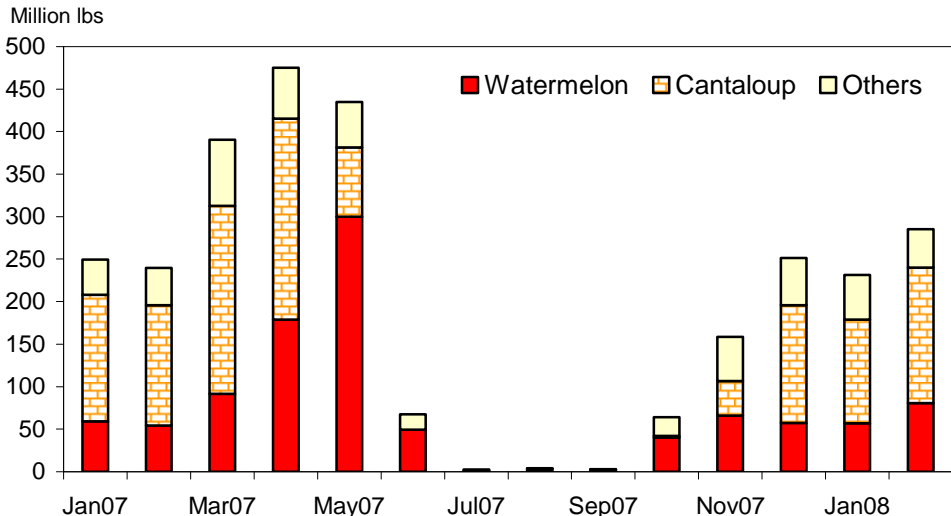
Table 9--U.S. melon crops: Per capita disappearance (net domestic use) 1/

Item	Average					
	1999-2003	2004	2005	2006	2007	2008 f
----- Pounds/person -----						
Cantaloup	11.11	10.01	9.79	9.57	9.85	9.76
Honeydew	2.22	2.21	2.08	2.11	2.02	2.03
Watermelon	14.31	12.98	14.01	15.91	16.24	16.33
Top three melons	27.64	25.20	25.88	27.59	28.11	28.12

f = ERS forecast. 1/ Disappearance is a proxy estimate for calendar year consumption.

Source: Estimates developed by USDA, Economic Research Service.

Figure 2  
**U.S. monthly melon imports, 2007-08**



Source: Compiled by ERS from data of U.S. Dept. of Commerce, U.S. Census Bureau.

## Processing Vegetables

### *Intended Area Down*

Contract area planted to the five leading processing vegetables (tomatoes, sweet corn, snap beans, green peas, and cucumbers) is expected to decline 2 percent from a year earlier to 1.18 million acres (table 10). To secure these acres, processors reportedly had to increase contract prices substantially this year in response to strong competition for available acres from field crops also planted by most processing vegetable growers. For example, the 2008 average base price (price at the first delivery point, excluding premiums) for processing tomatoes covered by California Tomato Growers Association contracts rose about 11 percent to a record (unadjusted for inflation) \$70 per short ton. The same issues that spurred contract price increases the past 2 years will remain in play in 2009 (reduced water availability, higher input costs, and high-priced alternative grain crops). Largely because of extremely high prices for grain crops and limited availability of acreage, the escalation in contract prices has been widespread across most processing vegetables, particularly in the Midwest and northwest where corn, soybeans, or wheat predominate.

Assuming processing vegetable yields remain near the average of the previous three seasons, total 2008 production of 11 selected processing vegetables could total more than 17 million short tons. Assuming another year of strong tomato yields in California, where the early crop is in good condition, processing vegetable output could approach the 17.8 million short tons harvested in 2007.

Canneries, which account for two-thirds of all processing vegetable area, expect to contract for 2 percent fewer acres than a year earlier. Given average yields, contract production of the five leading canning vegetables could reach 14 million short tons. However, strong California tomato yields could boost canning production to within 2 or 3 percent of the 2007 level.

U.S. tomato processors have contracted for 12.3 million short tons in 2008—down just 2 percent from the near-record crop produced a year earlier but 16 percent above two years ago. Production increased 19 percent in 2007 as average yield nearly reached the 2004 record high of 40.8 tons per acre. Like a year earlier, spring

Table 10--Contract plantings of selected processing crops 1/

Item	Contract plantings				Change
	2005	2006	2007	2008 f	2007-08
	----- 1,000 acres -----				Percent
<b>Canning</b>	845.9	811.8	796.6	781.6	-2
Tomatoes	281.8	297.7	316.3	305.6	-3
Sweet corn	226.9	197.6	180.0	185.5	3
Snap beans	145.3	139.7	133.3	120.8	-9
Green peas	93.5	90.6	80.8	80.3	-1
Cucumbers	98.4	86.2	86.2	89.5	4
<b>Freezing</b>	376.1	385.8	408.4	401.4	-2
Sweet corn	194.0	196.8	200.1	199.5	0
Snap beans	61.3	66.8	75.3	66.3	-12
Green peas	120.8	122.2	133.0	135.6	2
<b>Total</b>	1,222.0	1,197.6	1,205.0	1,183.0	-2

f = NASS prospective area for harvest. 1/ Excludes open market plantings.

Source: USDA, National Agricultural Statistics Service, *Vegetables*.

Table 11--Processing vegetables: Consumer and producer price indexes

Item	2008		2007	Change previous:	
	March	Feb.	March	Month	Year
	----- Index -----			----- Percent -----	
<b>Consumer Price Indexes (12/97=100)</b>					
Processed fruits and vegetables	131.5	132.9	125.4	-1.1	4.9
Canned vegetables	135.4	136.9	127.6	-1.1	6.1
Frozen vegetables (1982-84=100)	184.0	184.0	180.4	0.0	2.0
Dry beans, peas, lentils	141.1	145.5	126.8	-3.0	11.3
Olives, pickles, relishes	123.1	125.9	118.1	-2.3	4.2
<b>Producer Price Indexes (1982=100)</b>					
Canned vegetables and juices	149.2	148.9	143.1	0.2	4.3
Pickles and products	202.9	202.1	193.4	0.4	4.9
Tomato catsup and sauces 1/	142.4	142.5	137.2	-0.1	3.8
Canned dry beans	137.5	137.5	130.5	0.0	5.4
Vegetable juices 1/	118.1	118.1	117.3	0.0	0.7
Frozen vegetables	155.6	153.9	144.0	1.1	8.1
Frozen vegetable combinations	112.0	110.6	105.1	1.3	6.6
Dried/dehy. fruit & vegetables	188.1	186.3	175.0	1.0	7.5

1/ Index base year is 1987.

Source: U.S. Dept. of Labor, Bureau of Labor Statistics (<http://www.bls.gov/data/home.htm>).

weather has largely been favorable for the early processing tomato crop in California, which produces 95 percent of the U.S. crop. Despite higher prices in 2007, domestic demand for tomato products improved 7 percent from the sluggish performance of the previous year. In turn, tomato product inventories on January 1, 2007 were estimated to be the second lowest of this decade (2006 was the lowest) but with the large crop, stocks on December 31, 2007 became the highest on record. With interest rates falling, the economic cost of carrying excess stocks is lower. However, with another large crop expected in 2008, stocks may continue to increase as U.S. processors try to strike a balance with rising raw tomato costs and the uncertain economic climate. Although supply and demand would seem to suggest that wholesale tomato product prices will weaken, there may be less room on the downside since higher tomato acquisition and processing costs are likely beginning to squeeze margins.

Processors plan a 3-percent increase in area devoted to canning sweet corn in 2008. Assuming average weather and yield (the three-highest yields on record have occurred over the past 3 years), output of sweet corn for canning could rise 3 to 7 percent from last year's low level. Although wholesale prices for canned corn in retail sizes (24-300) are running about 6 percent higher than year-earlier levels (averaging \$9.63 per case), the price for food service sizes of canned corn (cases containing six number 10 cans) is now averaging 15 percent or more above the \$13.00 per case of a year earlier.

Although snap bean area for canning is expected to fall 7 percent from a year earlier and 14 percent below the average of the last 3 years, average yields could help production rise slightly in 2008. Although national yields for canning snap beans peaked in 2004 (at 4.1 short tons) and have declined for 3 consecutive years, the 2007 yield remained above pre-2002 levels.

Green pea canning acreage is expected to slip 1 percent to 80,300—the smallest planted area on record. Although yield was the second-highest on record in 2007 at 2.02 tons per acre, the three-year average yield would be 8 percent less. Given minor acreage changes, yield will be the primary determinant of the 2008 green pea

crop. Net domestic disappearance of canning green peas was estimated to be 343 million pounds in 2007—down 20 percent from the 1990s and 34 percent lower than average disappearance in the 1980s.

### ***Area For Freezing Down 2 Percent***

For processors of three major vegetables (sweet corn, snap beans, and green peas) used for freezing, contract area is expected to decline 2 percent in 2008. An expected increase in contract area for green peas for freezing will be outweighed by a sharp decline in area for snap beans and slightly lower sweet corn area. Given average yields (which would be an improvement over last year for sweet corn and snap beans), contract production of these three freezing vegetables is projected to total just under the 2.17 million tons produced a year earlier.

Intended contract area for snap beans used in frozen products is expected to decline 12 percent from a year earlier. With stocks on January 1 the highest this decade, processors are reducing area and pack this year. Despite the large crop last fall and increasing imports, wholesale prices have remained strong because of recent good domestic demand (only 2 percent of frozen snap bean supplies are exported). According to a Food Institute analysis of supermarket sales, retail sales volume was up 3 percent from a year earlier during the first 3 quarters of 2007. Average retail prices for frozen snap beans were up 6 percent during the same period. Domestic disappearance was up 14 percent in 2007 to a record 640 million pounds. An increasing share of domestic consumption has been satisfied by imports of frozen snap beans this decade. Nearly one-fifth of the snap beans in frozen products are now supplied by imports compared with just 3 percent a decade ago. Most of these imports come from Canada, China, and France.

### ***Net Domestic Use Rose in 2007***

Per capita disappearance (also known as use or net domestic use, a proxy for consumption) of processing vegetables (excluding potatoes, sweet potatoes, and

Table 12--Vegetables for freezing: Per capita disappearance (net domestic use) 1/

Selected items	Average 1999-2003	2004	2005	2006	2007	2008 f
----- Pounds/person, fresh-weight -----						
Sweet corn	9.34	9.07	9.46	9.32	9.98	9.33
Carrots	2.31	1.99	1.98	1.97	1.37	1.50
Broccoli	2.22	2.67	2.71	2.25	2.68	2.46
Green peas	1.94	1.69	1.71	1.70	1.94	1.83
Snap beans	1.86	1.94	1.80	1.87	2.12	2.01
Spinach	0.73	0.94	0.66	0.43	0.71	0.76
Cauliflower	0.45	0.38	0.36	0.36	0.36	0.30
Green limas	0.41	0.26	0.29	0.36	0.34	0.33
Asparagus	0.06	0.07	0.06	0.10	0.09	0.08
Other freezing	2.40	2.61	2.89	3.11	2.83	2.77
Subtotal	21.72	21.62	21.92	21.47	22.42	21.37
Potatoes 2/	57.31	57.32	53.74	53.15	52.25	51.77
Total	79.03	78.94	75.66	74.62	74.67	73.14

f = ERS forecast. 1/ Disappearance (also called use) is a proxy for calendar year consumption.

2/ Includes french fries and other frozen potato products. Data for 2007 are preliminary.

Source: Estimates developed by USDA, Economic Research Service.

mushrooms) increased 3 percent to about 119 pounds in 2007. On a fresh-equivalent basis, disappearance of vegetables used in manufacturing frozen, canned, and dehydrated products in 2007 was estimated to be 35.8 billion pounds—up 4 percent from a year earlier. With greater beginning stocks due primarily to the large 2007 tomato crop, the outlook for 2008 indicates processing vegetable disappearance could increase again. On a per-capita basis, use of processing vegetables could reach 121 pounds this year. Increased per capita consumer use is expected in 2008 for crops such as processing tomatoes, dehydrating onions, and pickling cucumbers, which should more than offset declining use of canning snap beans and sweet corn for freezing.

**Freezing vegetables**—Disappearance of vegetables for freezing (on a fresh-weight basis and excluding potatoes) increased 5 percent to 6.8 billion pounds (22.6 billion including potatoes) in 2007. On a per capita use basis, freezing vegetables (excluding potatoes) rose 4 percent to 22.4 pounds last year (table 12). Reduced use of asparagus, carrots, and miscellaneous (largely imported) vegetables was outweighed by rising use of sweet corn, snap beans, broccoli, green peas, and spinach. Net domestic use of broccoli for freezing recovered from the weather-reduced 2006 low of 2.3 pounds per person as both domestic production and imports increased. Including potatoes, per capita use of freezing vegetables remained steady at just under 75 pounds. Projections for 2008 indicate a small reduction is possible in per capita disappearance (especially for sweet corn) as economic growth slows and rising unemployment cuts into consumer spending.

**Canning vegetables**—In 2007, per capita net domestic use of canning vegetables (excluding potatoes) increased 3 percent to 95 pounds—recovering a portion of the loss of a year ago. Total domestic disappearance of canning vegetables in 2007 rose 4 percent from last year’s low level to 28.7 billion pounds. A 7 percent gain in processing tomato disappearance was primarily responsible for the increase. Excluding tomatoes, canning vegetable disappearance declined 4 percent from a year earlier to 8.0 billion pounds—the lowest since 2001. In addition to tomatoes,

Table 13--Vegetables for canning: Per capita disappearance (net domestic use) 1/

Selected items	Average 1999-2003	2004	2005	2006	2007	2008 f
----- Pounds/person, fresh-weight -----						
Tomatoes	69.19	69.80	70.55	64.49	68.57	70.57
Sweet corn	8.58	8.21	8.58	8.35	6.91	6.92
Chile peppers 2/ 3/	5.29	6.12	6.05	6.36	6.29	6.40
Cucumbers 4/	4.53	4.86	3.84	2.99	3.51	3.94
Snap beans	3.70	3.73	4.00	3.88	3.51	3.49
Carrots 3/	1.12	1.09	1.06	1.09	0.91	0.82
Green peas	1.34	1.23	1.04	1.11	1.14	1.08
Cabbage	1.23	1.12	1.22	1.21	1.25	1.26
Beets	0.75	0.84	0.75	0.53	0.67	0.63
Asparagus	0.22	0.20	0.19	0.17	0.14	0.14
Other canning	1.82	2.82	5.41	2.18	2.15	2.16
Subtotal	97.77	100.02	102.69	92.36	95.05	97.41
Potatoes 3/	1.56	1.21	0.92	0.78	0.93	0.96
Total	99.33	101.23	103.61	93.14	95.98	98.37

f = ERS forecast. 1/ Disappearance (use) is a proxy for calendar year consumption.

2/ Fresh and all processing uses of chiles. 3/ Estimates for 2007 are preliminary. 4/ For pickling.

Source: Estimates developed by USDA, Economic Research Service.



gains in per capita net domestic use were noted for cucumbers and green peas with decreases for sweet corn, snap beans, and carrots (table 13). Canning sweet corn use continues to erode, posting a 17-percent reduction to 6.9 pounds per person—the lowest since the mid-1930s. Tomatoes accounted for 72 percent of 2007 canning vegetable disappearance—about the same as a decade earlier. The outlook for 2008 indicates another small gain in net domestic use of canning vegetables, caused in large part by another strong tomato crop and continued increases in canned vegetable imports.

**Onions for dehydration**—Domestic disappearance of onions for dehydration totaled an estimated 311 million pounds in 2007, with per capita net domestic use falling to 1 pound. Per capita use of onions for dehydration has averaged 1.37 pounds during the 2000s, down 5 percent from 1.44 pounds during the 1990s. Disappearance is expected to increase in 2008 as processors maintain production at 2007 levels and imports increase during the first half of the year.

### *Export Value Soars*

During the first 2 months of 2008, the value of processed vegetable (excluding potatoes, pulses, and mushrooms) exports was running 29 percent above a year earlier due primarily to higher prices for most products. Frozen vegetable export value was up 41 percent because of higher prices for sweet corn, snap beans, green peas, and stronger volume for miscellaneous frozen vegetable mixtures. The value of canned vegetable exports was up 26 percent due largely to greater sales of tomato products. The volume of tomato product exports was up 29 percent due largely to increased shipments of paste (up 84 percent) and whole tomatoes (up 20 percent).

The value of processed vegetable (excluding potatoes, pulses, and mushrooms) imports during January-February rose 13 percent. Most of the strength in processed import value came from frozen vegetables, with the value of frozen imports jumping 41 percent. Canned (prepared/preserved) imports were up 5 percent, while dried/dehydrated imports declined 1 percent. The increase in frozen imports was largely fueled by gains in the volume of broccoli (up 47 percent) and cauliflower (up 70 percent) shipments. Frozen broccoli has accounted for about 40 percent of the volume of frozen vegetables so far in 2008. Among canned vegetables, import value was running below a year earlier for tomato products (down 17 percent), but was higher for artichokes (up 7 percent), asparagus (49 percent), and pimientos (9 percent). The top five sources of processed vegetable imports so far this year include Canada (31 percent of the total), Mexico (20 percent), China (13 percent), Peru (6 percent), and Italy (3 percent).

Table 14--Value of processed vegetable trade 1/

Item	2007	January - February		Change
	Annual	2006	2007	2007-08
----- Million dollars -----				
<b>Imports:</b>				<i>Percent</i>
Canned	912	132	147	5
Frozen	630	90	96	38
Dehydrated 2/	380	57	67	-1
<b>Exports:</b>				
Canned	593	85	88	26
Frozen	211	27	29	41
Dehydrated 2/	137	18	19	32

1/ Excludes potatoes and mushrooms. 2/ Includes dried.

Source: Derived by ERS from data of the U.S. Department of Commerce, U.S. Census Bureau.

# Potatoes

## *Fewer Acres but Stronger Yields*

Averaging 6 percent of the total potato crop, winter and spring potato harvests offer a solid start for the 2008 crop year. Area planted and harvest for the 2008 winter season was down 4 percent to 11,000 acres from 11,500 acres in 2007. However yields made up for the decline in acreage by increasing 16 percent to 250 hundred-weight (cwt) per acre, up from 215 cwt per acre in 2007. Yields this year surpassed the 5-year average of 246 cwt per acre. Winter season potato production in California (the only State now surveyed) increased by 11 percent to 2.8 million cwt, up from 2.5 million cwt in 2007.

Spring area planted in 2008 declined slightly from 73,000 acres to 69,200 acres. However, favorable weather has allowed estimated yields to increase slightly to 297 cwt per acre—up from 294 cwt a year earlier. Although Florida growers only increased plantings by 700 acres in 2008, adequate rainfall and mild temperatures increased yields 10 percent to 290 cwt per acre. This led to an estimated output of 8.1 million cwt in the state—4 percent above that of 2007. California decreased spring acreage by 14 percent. Although favorable weather boosted yields 5 percent to partially offset the drop in acreage, California's spring crop is expected to decline 5 percent from 2007's 6.1 million cwt.

In anticipation of reduced processing acreage in the coming year, some processors in the Columbia Basin of Washington are reportedly encouraging growers to plant seed pieces closer together in hopes of increasing overall yields. Other processors are stretching supplies of current storage potatoes through mid-summer, allowing extra time for the 2008 processing crop to bulk up in the fields. Contingent on yields performing at expected levels, the processing industry is expected to have enough potato supply to make it comfortably through the 2008 processing year.

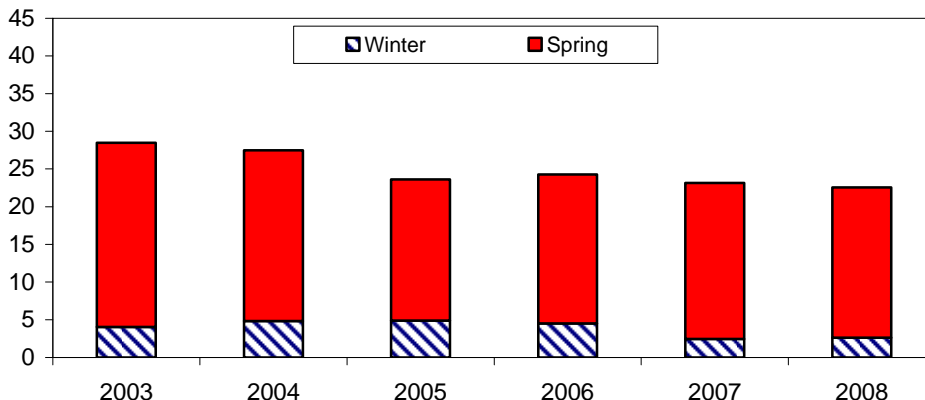
## *Stocks and Prices Remain Strong for 2007 Crop*

March shipments of chipping potatoes were 7 percent below 2007 levels at 4 million cwt versus 4.3 million cwt in 2007. January and February shipments also fell below 2007's pace, perhaps reflecting processor attempts to stretch 2007 fryer supplies in preparation for possible supply gaps in 2008's crop. Fresh tablestock

Figure 3

### **U.S. potatoes: Winter and spring production, 2003-08**

Mil. cwt



Source: USDA, National Agricultural Statistics Service, *Crop Production*.

shipments were down slightly in March to 9.17 million cwt versus 9.24 million cwt in 2007. Shipments from Idaho remained strong in February and March boasting 3 percent increases from the same period in 2007. February shipments from Idaho were 2.54 million cwt compared to 2.47 million cwt in 2007 and March shipments were 2.65 million cwt versus 2.59 million cwt in 2007.

Potato stocks remained strong through March with 43 percent of the fall production still in storage, compared to 41 percent the previous year. As of March 1, 172 million cwt were in storage compared with 160 million cwt in 2007. Potato products in cold storage at the end of February remained 5 percent above year earlier levels at 1.12 billion pounds. Frozen french fry stocks posted a 6-percent increase from a year ago with 902 million cwt reported. Although on the surface, stocks appear to

Table 15--U.S. potatoes: Monthly shipments 1/

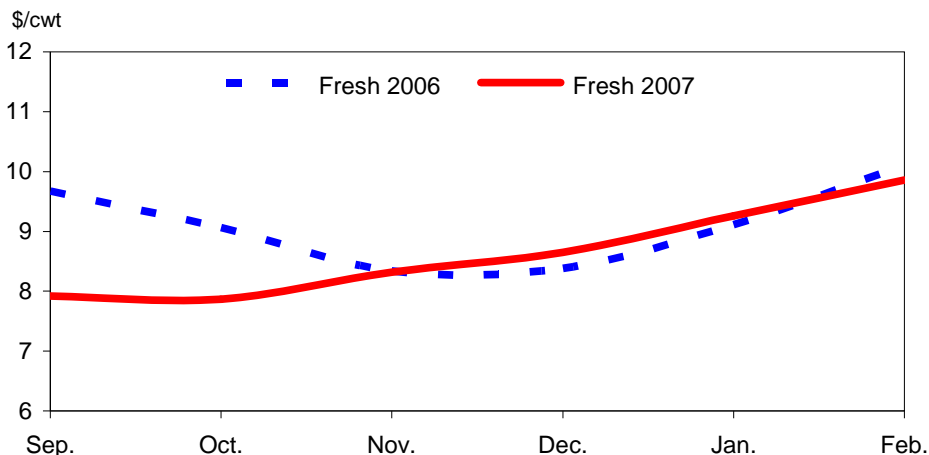
Item/year	Jan.	Feb.	Mar.	Year to date
----- 1,000 cwt -----				
<b>Seed</b>				
2006	522	646	2,319	3,486
2007	528	790	4,375	5,693
2008	511	572	3,457	4,540
% change	-3.2	-27.7	-21.0	-20.3
<b>Fresh market</b>				
2006	8,952	7,951	9,551	26,455
2007	9,161	8,071	9,242	26,474
2008	9,364	8,180	9,169	26,713
% change	2.2	1.3	-0.8	0.9
<b>Total potatoes</b>				
2006	13,079	11,515	15,348	39,942
2007	13,358	12,032	17,890	43,280
2008	13,182	11,900	16,601	41,683
% change	-1.3	-1.1	-7.2	-3.7

1/ Domestic shipments plus net exports.

Sources: Derived by ERS from data of USDA, Agricultural Marketing Service, *Market News* and U.S. Department of Commerce, U.S. Census Bureau.

Figure 4

**U.S. potatoes: Fresh prices received 2007 crop year to date 1/**



1/ Crop year is September - August.

Source: USDA, National Agricultural Statistics Service, *Agricultural Prices*.

be more than adequate this year, industry sources have expressed concern regarding the sufficiency of fresh-quality potatoes to meet market needs.

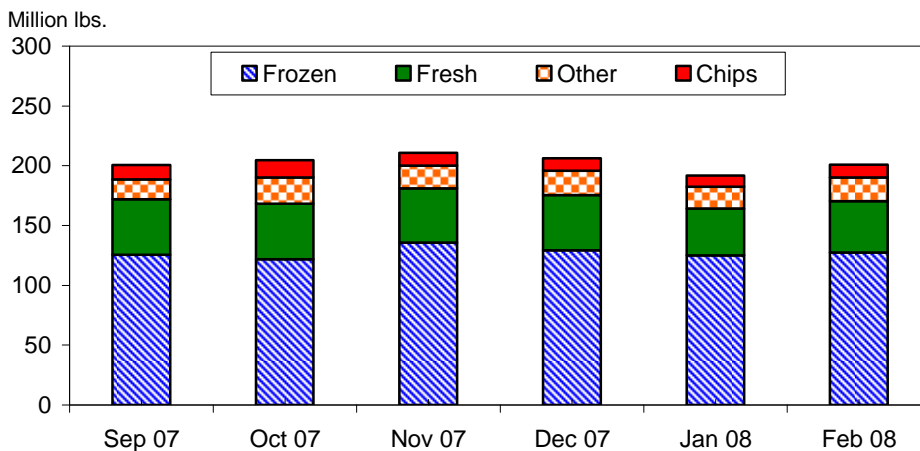
Prices remained strong in February, with prices received for all potatoes in the United States 9 cents above the strong levels of a year earlier. February was estimated to be \$7.51 per cwt, while the March preliminary price was \$7.82 per cwt, compared with \$7.42 per cwt and \$7.93 per cwt, respectively, the previous year. Average prices received for both fresh and processed potatoes in February remained strong relative to historical trends, with fresh prices posting at \$9.86, compared with \$8.21 over the previous 5 years, while processing prices were estimated at \$6.25—above both the 5-year average and a year earlier. Strong prices indicate solid demand for potatoes despite greater stocks.

### ***Exports Remain Strong***

Exports of U.S. potatoes remained strong through January and February with all export categories (except dehydrated flakes and granules) experiencing higher export volumes compared to last year's volumes. With 12-percent growth over 2007, exports totaled 4.1 million cwt during the first 2 months of 2008 (January-February) and were valued at \$174 million. Frozen french fries continue to enjoy strong export demand with the combined volumes of 1.25 million cwt in January and 1.28 million cwt February averaging 10 percent greater than a year earlier. With \$34 million in purchases, Japan absorbed the greatest amount of U.S. french fry exports during the first 2 months of 2008, displaying 8-percent growth over the previous year. China imported almost twice the volume of frozen french fries from the United States in February, with these exports valued at \$6 million versus \$3.6 million posted in February 2007.

U.S. total import volume of potatoes decreased in the first 2 months of 2008, with 5.3 million cwt imported compared to 5.5 million cwt a year earlier. Chip imports experienced a 75-percent decline from the previous year, with January and February imports totaling 29 thousand cwt. Imports of fresh tablestock potatoes, almost entirely from Canada, increased 12 percent from the prior year during January-February, with import volume of 2.5 million cwt.

Figure 5  
**U.S. potatoes: Export volume, monthly Sep 2007-Feb 2008**



Source: Prepared by ERS from data of U.S. Dept. of Commerce, U.S. Census Bureau.

## Dry Beans

### *Acreage Expected To Drop in 2008*

According to the USDA's *Prospective Plantings*, area planted to dry edible beans is expected to decline 8 percent this spring from last year's 1.53 million acres (table 16). Although the direction of change for this estimate has only missed once in the past 20 years (in 2006 a 3-percent increase was expected and actual dry bean plantings were unchanged), acreage intentions are subject to market adjustments. A year ago, area planted to dry beans exceeded the March intentions by 22,400 acres. Final planted area depends on factors such as weather (e.g., excess spring rain may favor increased dry bean area) and changes in relative price relationships among crops. This year, prospective dry bean area was down because of broad price strength exhibited among competing crops, especially soybeans (prospective acreage up 18 percent) and wheat (area up 6 percent). Although area devoted to field corn is expected to be lower in 2008, the crop remains a potent alternative for growers still on the fence.

With the exception of Nebraska and Colorado, dry bean acreage was expected to decline in all major dry bean States, with area down in 12 of the 18 surveyed States. Although Nebraska's dry bean area was projected to reach 125,000 acres, it would remain the third-lowest for the State over the past 30 years. Similarly, the prospective dry bean area in Colorado would be the second-lowest in the State since 1915. Since planting does not finish until June in some areas, further adjustments to indicated acreage will likely take place. The next acreage estimate for dry beans will be released in the June 30 *Acreage* report.

In the late-March *Prospective Plantings*, the major area intentions were as follows:

- North Dakota, the leading producer of all dry beans (including pinto and navy), indicated 10-percent decline in area planted;
- Michigan, the second-leading producer in 2007 and the top source for black beans, plans to reduce seeded area 5 percent;

Table 16--Dry edible beans: Planted area 1/

Item	2004	2005	2006	2007	2008 f	Change
						2007-08 2/
----- 1,000 acres -----						Percent
California	60.0	66.0	67.0	59.0	46.0	-22
Colorado	75.0	90.0	70.0	48.0	50.0	4
Idaho	80.0	100.0	105.0	90.0	80.0	-11
Michigan	190.0	235.0	225.0	200.0	190.0	-5
Minnesota	115.0	145.0	145.0	150.0	130.0	-13
Montana	13.0	18.0	19.5	18.3	13.0	-29
Nebraska	120.0	175.0	140.0	110.0	125.0	14
New York	24.0	25.0	19.0	17.0	16.0	-6
North Dakota	560.0	620.0	670.0	690.0	620.0	-10
Texas	20.0	17.0	20.0	17.0	15.0	-12
Washington	30.0	49.0	61.0	60.0	50.0	-17
Wyoming	25.0	34.0	29.0	25.0	25.0	0
Others	42.3	56.0	59.3	42.6	38.5	-10
<b>U.S.</b>	<b>1,354.3</b>	<b>1,630.0</b>	<b>1,629.8</b>	<b>1,526.9</b>	<b>1,398.5</b>	<b>-8</b>

f = Prospective area.

1/ Excludes garden seed.

Source: USDA, National Agricultural Statistics Service, *Prospective Plantings*.

- Minnesota plans a 13-percent reduction in dry bean area to 130,000 acres—just below the State’s average dry bean area over the past five years;
- Colorado indicated a 4-percent increase in dry bean area for 2008. Pinto beans accounted for more than three-fourths of the State’s 2007 area;
- Idaho expects to plant 80,000 acres of dry beans in 2007, down 11 percent from a year earlier. The share of seeded area accounted for by garbanzo beans is expected to decline from 46 percent in 2007 to 35 percent this year;
- Driven largely by strong Great Northern bean prices, prospective area in Nebraska, the leading source of Great Northern beans and the second-leading pinto bean producer, is expected to rise 14 percent in 2008.

The preliminary 2007/08 season-average grower price for all dry beans was estimated at \$26.40 per hundredweight (cwt)—up 19 percent from a year earlier and 43 percent above the low level of 2 years ago. It was also the highest season-average dry bean price since 1989. The continued uptrend in dry bean prices this marketing year results from both the basic supply and demand forces within the dry bean complex and relentless pressure from crop markets competing for acreage. Given the external market forces involved, the dry bean industry will continue to face this same competitive scenario over the next several years.

Grower prices are averaging above a year earlier for virtually every class of dry bean covered by *Market News* data (table 17). With the exception of pinto beans, grower bids are at least \$30 for every dry bean class. Partly because dry bean production for individual classes tends to be regionalized, prices largely react to their own set of supply and demand characteristics. However, the external pressure generated by the biofuel mandate has affected each dry bean class and caused prices to ratchet higher. This appears to be the first time since the early 1970s (the widespread commodity price inflation of 1973) that a common market phenomenon has affected every dry bean class. For example, early April pinto bean prices in the upper Midwest averaged \$29 per cwt—26 percent above the previous year and more than double the lows of 2005/06. Small red beans (Idaho/Washington) averaged \$41 per cwt in early April—up 74 percent from a year earlier.

Given lower dry bean acreage this year and a return to average yields (which would be lower than a year ago), stocks will remain low and prices will remain strong

Table 17--U.S. dry beans: Monthly grower prices for selected classes, 2007-2008 1/

Commodity	2007		2008		Chg. prev. year:	
	March	April	March	April 2/	March	April
	----- Cents/pound -----				--- Percent ---	
All dry beans	25.70	24.50	32.20	--	25.3	--
Pinto (ND/MN)	23.50	23.25	29.75	29.17	26.6	25.5
Navy (pea bean) (MI)	21.44	22.63	34.00	34.50	58.6	52.5
Great Northern (NE/WY)	24.75	26.00	35.75	38.00	44.4	46.2
Black (MI)	23.63	26.06	33.69	35.42	42.6	35.9
Light red kidney (CO/NE)	27.50	31.00	45.00	--	63.6	--
Dark red kidney (MN/WI)	25.50	28.38	--	--	--	--
Baby lima (CA)	44.50	--	41.50	--	-6.7	--
Large lima (CA)	63.50	--	62.50	63.00	-1.6	--
Blackeye (CA)	--	--	38.50	38.50	--	--
Small red (WA/ID)	22.50	23.63	41.00	41.00	82.2	73.5
Pink (WA/ID)	21.83	22.38	31.67	32.00	45.1	43.0
Garbanzo (WA/ID)	29.50	29.50	32.83	34.67	11.3	17.5

-- = not available. 1/ Prices are U.S. No. 1, cleaned basis. 2/ Partial month estimate.

Sources: USDA, Agricultural Marketing Service, *Bean Market News*, except "all dry beans" from USDA, National Agricultural Statistics Service, *Agricultural Prices*.

relative to their historic levels to help maintain parity with other crops and preserve grower interest in dry beans. If yields are impaired by adverse weather this summer, the 2008/09 dry bean season average price could easily exceed the 1988 nominal dollar record high of \$29.90 per cwt.

**Per Capita Disappearance Rises**

After hitting a recent low in 2004, disappearance (also known as net domestic use, which is a proxy for consumption) of dry edible beans increased for the third consecutive year in 2007 (calendar year estimate). With greater domestic availability (due to an increase in the 2007 crop, larger imports, and smaller exports) outweighing higher prices, domestic use rose to just under 2 billion pounds. When expressed on a per person basis, net domestic use of dry beans increased 3 percent to 6.6 pounds—up 0.6 pound from the low of 6.0 pounds reached in 2004 after five consecutive annual declines in per capita use. In 2008, domestic dry bean use is expected to remain steady at best due to current expectations for a smaller crop, higher dry bean prices, and generally lower carryin stocks from 2007. As in 2007, reduced export volume and increased imports will be key in the maintenance of domestic disappearance.

In 2007, gains in per capita net domestic use were noted for both white and nonwhite bean classes (each up 3 percent). White beans (navy, Great Northern, lima, and small white) accounted for 20 percent of all dry beans available domestically, the same as a year earlier but down from 31 percent a decade ago. Most of the small gain in white beans in 2007 came from increased use of navy beans. With higher carryin stocks from the strong 2006 crop and reduced export volume, per capita use of navy beans increased in 2007 for the third consecutive year. With per capita use rising to 5.2 pounds in 2007, nonwhite beans (e.g., pinto, dark red kidney, black, etc.) remained dominant, led by pinto beans, black beans, and the surging popularity of garbanzo beans (mostly kabuli chickpeas). Driven by two consecutive strong crops in 2006 and 2007, domestic disappearance of black

Table 18--U.S. dry edible beans: Per capita disappearance (net domestic use) 1/

Item	Average 1999-2003	2004	2005	2006	2007	2008 f
----- Pounds/person -----						
Pinto	3.29	2.75	2.56	2.72	2.80	2.81
Navy (pea)	1.03	0.55	0.72	0.88	0.98	0.98
Black	0.52	0.53	0.49	0.53	0.64	0.65
Great Northern	0.45	0.34	0.29	0.30	0.25	0.31
Light-red kidney	0.32	0.29	0.34	0.25	0.24	0.27
Garbanzo	0.28	0.25	0.29	0.44	0.44	0.39
Blackeye	0.22	0.13	0.16	0.17	0.17	0.17
Dark-red kidney	0.21	0.20	0.28	0.25	0.24	0.27
Pink	0.17	0.19	0.21	0.18	0.20	0.18
Small red	0.15	0.16	0.25	0.18	0.21	0.19
Cranberry	0.09	0.06	0.06	0.04	0.02	0.03
Large lima	0.10	0.08	0.08	0.08	0.06	0.06
Baby lima	0.08	0.06	0.05	0.03	0.03	0.04
Others 2/	0.24	0.38	0.39	0.33	0.28	0.25
All dry beans	7.15	5.97	6.17	6.38	6.56	6.60

f = ERS forecast. Calendar year estimates. Includes net trade.  
 1/ Disappearance is a proxy estimate for consumption. 2/ Includes small white and all others.

Source: Estimates developed by USDA, Economic Research Service.

beans reached a record high in 2007 at 0.64 pounds per person. Garbanzo bean use also remained strong in 2007, maintaining the high reached in 2006 at 0.44 pounds.

### **Exports Down 1 Percent**

During the first 6 months of the marketing year (September 2007-February 2008), U.S. exports of dry beans declined just 1 percent from a year earlier to 3.9 million bags (cwt). Among the leading dry bean export classes, exports of Great Northern (up 35 percent), dark red kidney (98 percent), garbanzo (14 percent), and small red beans (20 percent) posted increases. With rising U.S. prices and dwindling exportable stocks, exports of black, pinto, and navy beans declined (table 19).

Despite higher prices, export volume has remained resilient this year despite reduced movement to the top two destinations—Mexico was down 36 percent and shipments into Canada fell 17 percent. Exports to the United Kingdom were up 27 percent due largely to greater navy bean shipments. Japan (up 1 percent), Spain, and Italy have also imported more U.S. dry beans this season. For all dry beans, the September-February 2007/08 average U.S. dry bean export unit value was up 15 percent from the previous year to 31.8 cents per pound.

Table 19--U.S. dry beans: Crop year export volume to date

Item	Crop year 2006/07	September - February		Change 2006-07	
		2005/06	2006/07		2007/08
----- 1,000 cwt -----					
<i>Percent</i>					
Pinto	2,045	1,197	1,273	1,148	-10
Navy	1,217	689	722	599	-17
Black	1,188	333	526	378	-28
Garbanzo	456	282	267	305	14
Great Northern	366	443	239	323	35
Baby lima	251	127	169	147	-13
Light red kidney	181	77	120	89	-26
Dark red kidney	158	157	77	152	98
Cranberry	132	52	65	58	-11
Large lima	103	99	74	60	-20
Small red	99	106	38	45	20
Mung & urd	27	8	15	11	-21
Blackeye	19	23	11	15	34
Pink	15	28	9	43	374
Other	719	486	303	481	59
Total	6,975	4,106	3,908	3,856	-1

Source: Compiled by ERS from data of the U.S. Department of Commerce, U.S. Census Bureau.

Table 20--U.S. dry beans: Crop year import volume to date

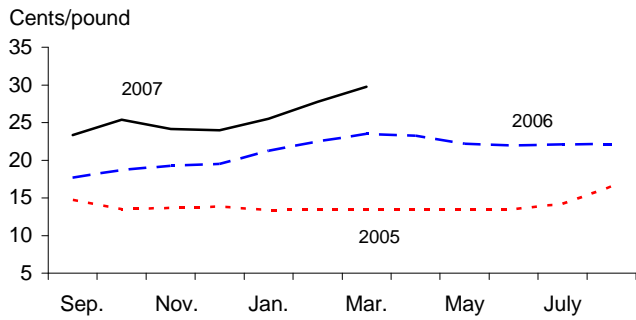
Item	Crop year 2006/07	September - February		Change 2006-07	
		2005/06	2006/07		2007/08
----- 1,000 cwt -----					
<i>Percent</i>					
Pinto	91	22	29	127	339
Navy	165	93	63	96	52
Black	499	117	192	184	-4
Light red kidney	124	46	57	64	12
Garbanzo, all	295	102	138	163	18
Mung & urd	352	146	181	150	-17
Other	1,247	556	658	618	-6
Total	2,773	1,081	1,318	1,402	6

Source: Compiled by ERS from data of the U.S. Department of Commerce, U.S. Census Bureau.

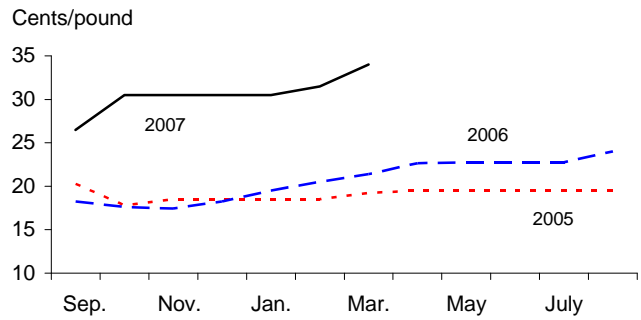


Figure 6  
**Grower bids for U.S. dry edible beans, 2005/06-07/08**

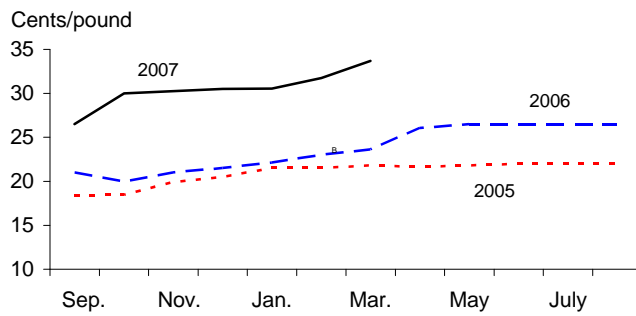
**Pinto (ND/MN)**



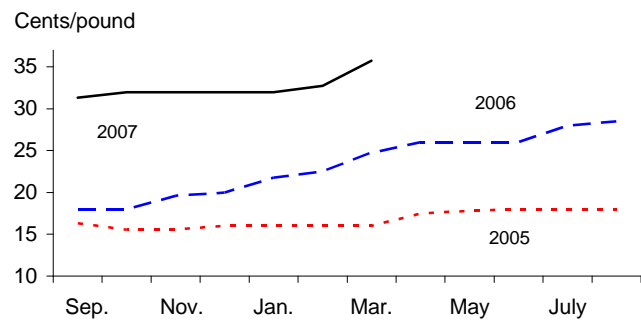
**Navy/pea (MI)**



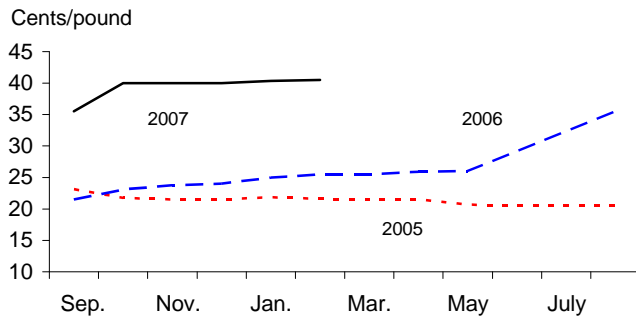
**Black (MI)**



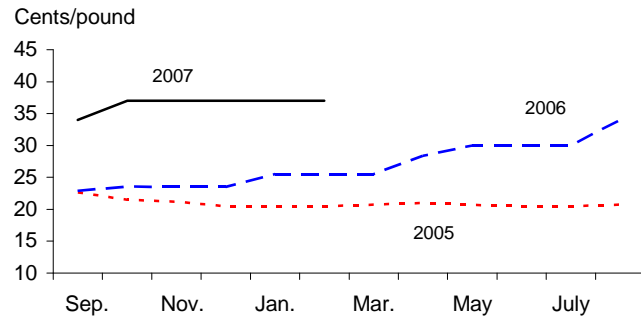
**Great Northern (NE)**



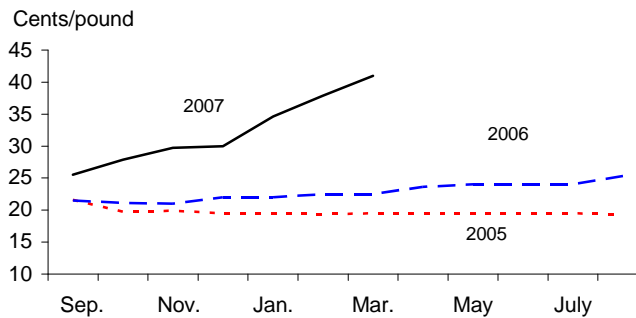
**Light red kidney (MI)**



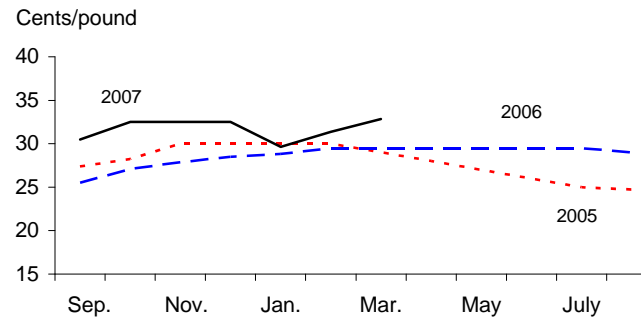
**Dark red kidney (MN/WI)**



**Small red (ID/WA)**



**Garbanzo (ID/WA)**



Source: USDA, Agricultural Marketing Service, *Bean Market News*.

## Dry Peas and Lentils

### *Acreage Expected To Decline*

According to the USDA's *Prospective Plantings*, area planted to dry peas, Austrian winter peas, small chickpeas, and lentils is expected to decline 4 percent this spring from last year's 1.19 million acres (table 21). Because of the widespread positive financial outlook for most crops this year (including peas and lentils), early prospective acreage estimates may be subject to more variation than normal due to factors such as weather and changes in relative price relationships among crops. Growers expect to plant fewer pea and lentil acres despite relatively attractive prices. March grower prices for all dry peas (food and feed) and lentils were more than double those of a year earlier, while small chickpea prices were averaging 47 percent above year-earlier levels (table 22).

For dry peas, acreage reduction is expected to be relatively consistent between the Midwestern and western regions. In North Dakota, the leading dry pea producing state, competition with crops such as durum wheat has been intense this year with strong world demand for both crops pushing prices well above year earlier levels. After 7 consecutive annual increases, Montana growers indicated they will reduce area devoted to dry edible peas 6 percent in 2008. Lentil area is expected to remain steady in Montana this year after reaching a recent high of 150,000 acres in 2005 (figure 7). In Idaho, dry pea growers largely concentrate on the higher-priced food pea market. This year's strong food-grade pea prices are expected to entice Idaho dry pea growers to increase seeded area by 20 percent.

With a decline in planted area, output of all dry peas and lentils is expected to decline in 2008, given average yields. The 3-year average for dry pea and lentil

Table 21--Dry peas and lentils: Planted area 1/

Item	2005	2006	2007	2008 f	Change 2007-08 2/
	----- 1,000 acres -----				Percent
<b>Dry peas</b>	808.0	925.5	847.5	820.0	-3
N. Dakota	540.0	610.0	515.0	500.0	-3
Washington	80.0	67.0	67.0	65.0	-3
Others	188.0	248.5	265.5	255.0	-4
<b>Austrian winter peas</b>	42.5	46.0	29.0	25.5	-12
Montana	25.0	32.0	20.0	19.0	-5
Idaho	10.0	9.0	6.0	4.0	-33
Others	7.5	5.0	3.0	2.5	-17
<b>Lentils, all</b>	450.0	429.0	303.0	277.0	-9
N. Dakota	150.0	160.0	110.0	95.0	-14
Washington	85.0	77.0	68.0	60.0	-12
Others	215.0	192.0	125.0	122.0	-2
<b>Small chickpeas</b>	10.5	17.4	11.1	15.4	39
N. Dakota	4.0	7.5	4.5	9.0	100
Idaho	3.0	4.0	3.5	2.0	-43
Others	3.5	5.9	3.1	4.4	42
<b>Total</b>	1,311.0	1,417.9	1,190.6	1,137.9	-4

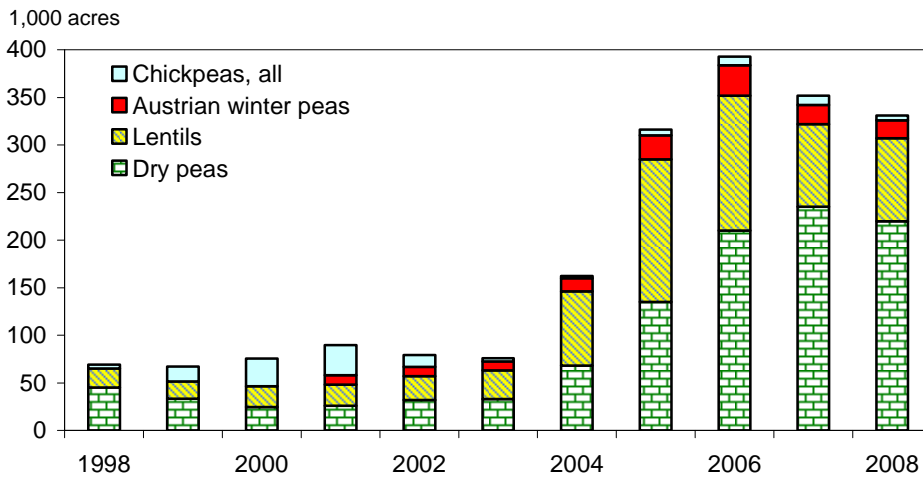
f = Prospective area.

1/ 2007 was the first year these crops have been included in the *Prospective Plantings* report.

Source: USDA, National Agricultural Statistics Service, *Prospective Plantings*.

Figure 7

**Montana dry peas and lentils: Acres planted, 1998-2008**



Source: USDA, National Agricultural Statistics Service, *Crop Production, Prospective Plantings*.

Table 22--U.S. dry peas and lentils: Monthly grower prices by class, 2006/07-07/08

Crop year & month	Dry peas	Chickpeas			Austrian winter peas	All lentils
		All	Large	Small		
----- Cents/pound -----						
<b>2006/07</b>						
July	5.03	22.80	--	--	--	7.82
August	4.52	24.60	26.30	--	6.91	9.30
September	5.75	25.40	25.50	--	6.84	12.10
October	6.02	22.10	25.60	15.90	6.41	12.00
November	6.55	24.80	24.90	--	6.89	13.30
December	7.02	25.10	25.20	--	7.04	11.60
January	7.23	27.80	28.00	--	6.95	14.10
February	7.62	26.80	27.70	12.90	7.95	13.50
March	8.33	27.40	29.60	17.30	8.22	12.10
April	9.52	20.80	20.80	--	6.91	13.20
May	10.10	29.50	30.00	19.50	9.75	13.20
June	10.10	28.40	29.90	--	9.42	12.70
<b>2007/08</b>						
July	9.30	27.20	28.70	--	--	13.90
August	8.91	29.50	29.60	--	9.85	15.50
September	9.71	30.90	31.70	--	11.30	19.10
October	12.20	25.20	27.00	14.50	13.20	21.70
November	12.00	26.90	26.90	--	14.40	24.30
December	14.30	29.50	30.90	19.60	15.10	26.60
January	14.00	30.40	30.90	21.10	--	25.40
February	16.40	30.20	32.10	23.90	--	29.00
March 1/	18.10	33.40	35.00	25.50	--	31.20
Percent change year ago March	117.3	21.9	18.2	47.4	--	157.9

-- = not available. 1/ Prices for March 2008 are mid-month averages.

Source: USDA, National Agricultural Statistics Service, *Agricultural Prices*.

yields would be below the relatively favorable 2007 performance. As a result, the present outlook points to a drop of about a tenth in total dry pea and lentil output in 2008.

### ***Export Volume Up, Imports Down***

U.S. export volume (including food aid) of all dry peas and lentils (excluding seed) totaled 9.93 million cwt over the first 8 months (July-February) of the 2007/08 crop marketing year—up 15 percent from a year earlier. Stronger supplies, favorable exchange rates, and good world demand pushed chickpea export volume up 28 percent. Movement of split peas, dry whole green, and dry yellow pea volume continued to expand during the first three quarters of the marketing year, while exports of lentils (down 7 percent) and Austrian winter peas declined (table 23). A surge in shipments to India (where weather disrupted domestic production) over the past 2 years has been key to the export growth for U.S. dry peas. This year, pea and lentil exports to India are up 43 percent and, as in past years, have consisted mostly of green and yellow peas.

Split peas have continued to experience strong foreign movement this season led by shipments to Peru, Ethiopia, Bangladesh, India, and Djibouti. These 5 countries together accounted for about three-fourths of overseas volume through February. Although several months remain in the marketing year, split pea exports have exceeded the 2006/07 record high of 38 million pounds.

Imports of all dry peas and lentils totaled 0.84 million cwt over the first 8 months of the 2007/08 crop marketing year—down 11 percent from a year earlier. Lentil imports were down 38 percent due largely to the supply shortfall in India, which had accounted for nearly half of U.S. lentil imports over the past several years.

Table 23--U.S. dry peas & lentils: Foreign trade volume by class 1/

Item	Crop year 2006/07	July-February			Change 2006-07 Percent
		2005/06	2006/07	2007/08	
----- 1,000 cwt ----- Percent					
<b>Exports:</b>					
Green peas	3,708.6	1,916.0	2,672.2	2,925.7	9
Yellow peas	3,547.2	1,546.9	2,770.7	3,010.9	9
Split peas	380.7	127.7	134.7	481.1	257
Austrian winter pea	49.8	19.4	40.2	24.0	-40
Misc. dry peas	1,126.1	2,214.5	994.9	1,474.2	48
Chickpeas, all	414.0	315.7	289.8	370.0	28
Lentils, all	2,332.8	2,498.2	1,763.0	1,642.3	-7
Total	11,559.3	8,638.4	8,665.5	9,928.2	15
<b>Imports:</b>					
Green peas	214.2	148.0	140.9	136.2	-3
Yellow peas	87.3	58.6	31.7	56.5	78
Split peas	344.1	184.9	242.5	225.5	-7
Austrian winter	5.0	1.4	2.6	1.5	-44
Misc. dry peas	170.5	93.0	118.1	64.9	-45
Chickpeas, all	292.7	136.3	190.8	218.4	14
Lentils, all	294.7	163.0	218.2	134.5	-38
Total	1,408.5	785.2	944.9	837.6	-11

1/ Excludes planting seed.

Source: Compiled by ERS using data from the U.S. Dept. of Commerce, U.S. Census Bureau.

## Commodity Highlight: Potato Chips

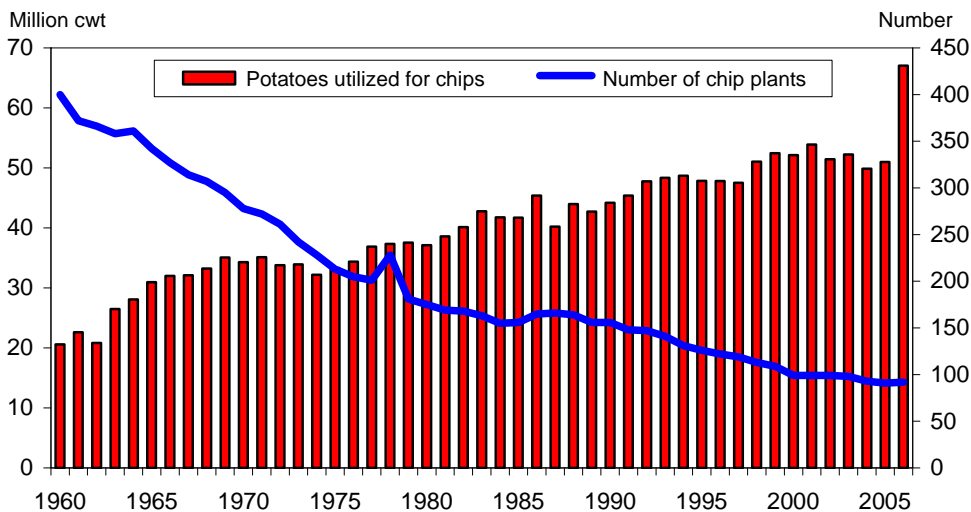
Potato chips, an important snack food and sandwich side dish, did not gain widespread market appeal in the United States until the mid 1900s. They were invented in the 1850s when a chef humorously responded to a customer's complaint that the eating establishment's french fries were cut too thick. It wasn't until the introduction of automatic potato-peeling machines in the 1920s, along with subsequent innovations in frying techniques in the 1950s that potato chip production began its rise to mass-consumption popularity.

Traditionally, potato chips were produced by frying thinly sliced pieces of potatoes and salting them. Popular oils used for frying potato chips are corn, cottonseed, palm, and more recently, sunflower oil. In the 1970s, fabricated chips made from dehydrated potatoes were introduced. Dehydrated potato chips are formed by mixing dehydrated flakes of potatoes with water to form dough from which uniform chips are cut. This allows potato chips to be produced with a consistent size and in some cases permits more chips to be transported at one time due to more efficient packaging methods. Over time, an increased variety of chip products have been introduced to the market, such as ridged, low oil, no salt, organic and baked chips, along with a wide variety of chip flavors. Due to low sugar content (which prevents potatoes from browning during the frying process), Snowden, Pike, and Atlantic are the most popular varieties used for chip production.

Growers producing chipping potatoes usually operate on a contract basis with processors. Processors will forecast demand for the coming year and negotiate contracts with growers to meet that demand. Contracts are traditionally signed in the fall for one or multiple years and specify payment based on volume delivered, quality and/or size. Contracts provide security for both processors and growers, as they guarantee supplies for chip processing and demand for the chipping crop. At times when processors underestimate demand, they will shore up chipping supplies by purchasing potatoes on the open market. During years when input costs such as fuel or fertilizer are rising, growers are less likely to sign fixed-price processing contracts given the uncertainty contract prices (negotiated months before harvest) will cover production costs.

Figure 8

### U.S. potato chips: Number of chip plants and potato volume processed



Source: USDA, National Agricultural Statistics Service, *Potato Summary*.

## ***Industry Consolidation Leads to Efficient Production***

The traditional potato chipping industry has greatly consolidated operations over the past 20 years, with fewer plants processing greater portions of the chip supply. In 1960 there were 400 plants processing 20 million cwt of chipping potatoes (figure 8). In 2006 there were 92 chipping plants processing 67 million cwt of chipping potatoes—68 percent growth in production with 77 percent fewer processors. Most plants are strategically located around large population centers in the United States because the fragility of potato chips makes long transport challenging. A large share of potato chip processing plants (37 percent) are located in the eastern States, processing 42 percent of the potatoes used for chipping. The remainder of the potato chip industry is located in the Midwest (32 plants) and Western States (26 plants).

Retail prices for potato chips are considerably higher compared to other potato products (such as fresh or frozen french fries). Since 2000, retail prices for potato chips have averaged \$3.41 per pound, while fresh and french fried potatoes have averaged \$0.45 and \$1.05 per pound. Frying oil is an expensive input in chip production, leading to high retail chip prices. Because chips are thinly sliced and contain more surface area, they absorb more oil than other processed potatoes (such as french fries). Depending on the type of frying oil used, oil content in chips can range between 30 and 40 percent. It also takes a large amount of potatoes to produce potato chips. A potato is roughly 80 percent water (when harvested) and it requires about 4 pounds of raw potatoes to manufacture 1 pound of potato chips.

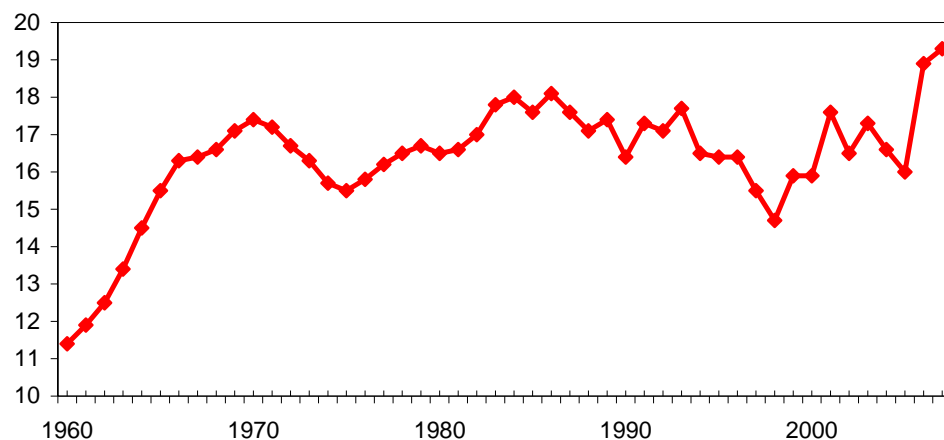
## ***Who Purchases Potato Chips?***

Potatoes used for chipping in the United States are largely produced and consumed domestically, with relatively small volumes being traded. For example, in 2007 about 3 percent of the domestic disappearance of potato chips can be attributed to imported products. At the same time, roughly 7 percent of the potato chip supply was exported. Net exports (exports minus imports) of potato chips were valued at \$91 million in 2007, with \$172 million in exports and \$81 million in imports. Canada, Mexico and Japan are our three largest potato chip export markets, with Canada absorbing \$46 million in U.S. chips, while Mexico and Japan imported \$32 million and \$27 million, respectively, in 2007.

Figure 9

### **U.S. chipping potatoes: Per capita net domestic utilization, 1960-2007**

Lbs/person



Source: Calculated by USDA, Economic Research Service.

Potato chip consumption in the United States has steadily increased over the past five decades from 11.4 pounds per person in 1960 to an estimated 19.3 pounds per person in 2007 (figure 9). Given the sizable population consuming potato chips, it is interesting to note some of the demographics behind chip purchases. The Nielsen Homescan dataset is one of the few means available to gain this perspective. This dataset tracks grocery purchases and demographic information of 41,000 households across the United States.

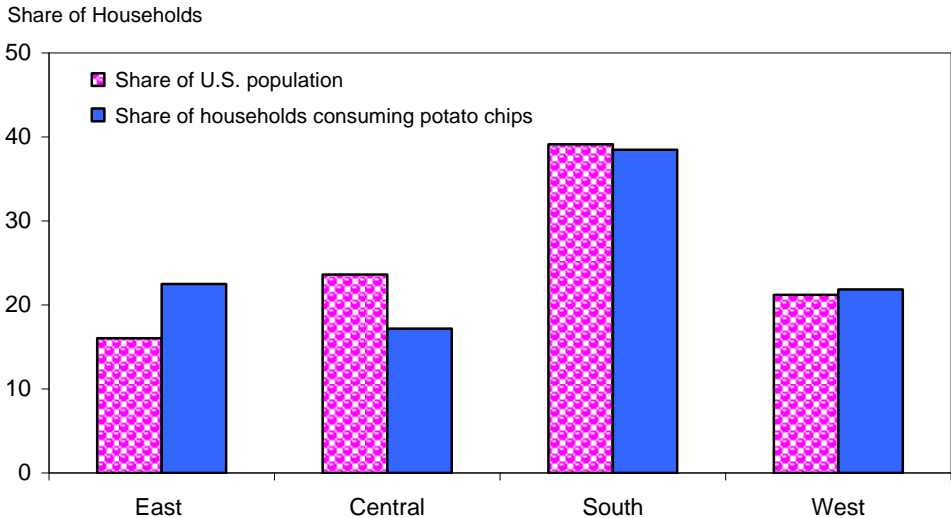
An estimated 79 percent of potato chips are consumed at home.<sup>1</sup> Therefore the Homescan dataset (when weighted to represent the U.S. population) theoretically denotes demographics from more than three-fourths of the chip-consuming population. Three demographic categories including the region in which the chip purchaser resides, the household income of the chip consumer, along with the racial composition of the purchaser, were extracted from the dataset. Purchase information includes both dehydrated and traditional chips.

<sup>1</sup> Lin, Biing-Hwan et al. "Market Distribution of Potato Products in the United States," *Journal of Food Products Marketing*, Vol. 6. No. 4. 2001.

In 2006, the majority of potato chip consumers resided in the southern United States (38 percent), while roughly 23 percent resided in each of the eastern and western regions, and 17 percent were located in the central portion of the country. In proportion to the total regional population, a greater share of chip consumers resided in the eastern United States, meaning per household share of chip consumption was greatest in the East (figure 10). When compared with the total regional population, a smaller share of central U.S. households purchased potato chips, whereas southern and western States were virtually equal in the share of potato chip households compared to total regional populations.

When breaking down income levels of chip consumers, 50 percent were middle income households (households with incomes between \$30,000 and \$69,999). Upper income (\$70,000 and greater) and lower income (below \$30,000) households included 25 percent of chip consumers. Conventional thought hypothesizes lower income, less educated households are more likely to purchase potato chips. In this dataset however, the majority of chip consuming households were classified as middle income with mid education levels. Education levels of chip consumers

Figure 10  
**Potato chips: Share of household consumption by region**



Source: Compiled by USDA, ERS from data of A.C. Nielsen Homescan.

mirror the income results with chip households peaking at the mid-education level, and dropping off at the lower and higher education levels. Roughly 61 percent of chip consumers had some college education, or a college degree, whereas only 11 percent of chip households held graduate degrees and 28 percent had high school education or less.

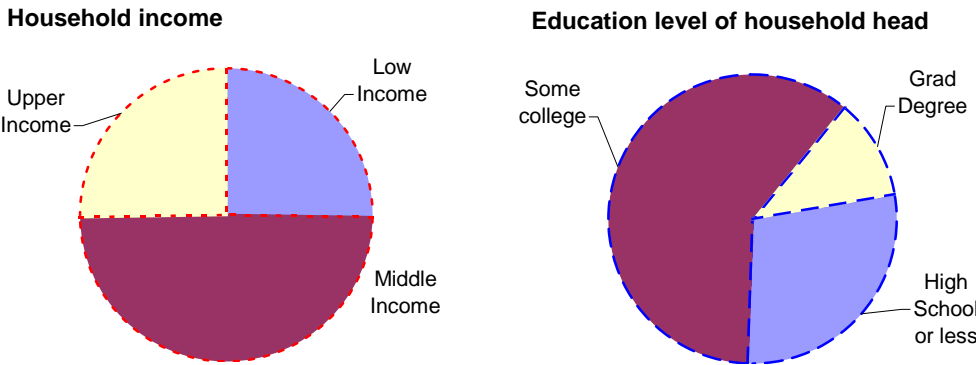
The racial composition of chip consumers was divided into five racial categories:

- Caucasian—73 percent
- African American—14 percent
- Other—6 percent
- Asian—4 percent
- Hispanic origin—3 percent

According to the Census Bureau, those of Hispanic origin make up 13 percent of the U.S. population, yet only purchase 3 percent of potato chips. With Hispanics being one of the fastest-growing segments of the U.S. population, that segment has valuable market potential for chip producers.

Potato chips continue to grow in consumption, and have historically proven to be a valuable potato product within the U.S. food industry. Chip consumers seem to be varied in demographics with the greatest share residing in the southern United States, and earning middle incomes with mid-education levels. However, there appears to be areas amongst certain demographic segments where chipping firms have yet to maximize market potential. Always at the forefront of innovation, the creativity of the chipping industry remains key to maintaining future consumer interest and industry growth.

Figure 11  
**Selected demographics of potato chip-consuming households**



Source: Compiled by USDA, ERS from data of Nielsen Homescan.



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Covers potatoes and sweet potatoes.

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### Articles

The following are links to articles released on subjects directly related to the vegetable and melon industry. These articles are in Adobe Acrobat (.pdf) format:

#### **1. Dietary Assessment of Major Trends in U.S. Food Consumption, 1970-2005**

<http://www.ers.usda.gov/Publications/EIB33/>

Examines major trends in the amount of food available for consumption. Estimates whether Americans are meeting Federal dietary recommendations for each of the major food groups, including fruits and vegetables.

#### **2. Are Lower Income Households Willing and Able To Budget for Fruits and Vegetables?**

<http://www.ers.usda.gov/publications/err54/>

Analyzes the relationship between income and fruit and vegetable consumption by low-income households. Could small adjustments to the buying power of low-income households increase their purchases of fruits and vegetables?

#### **3. Price Trends Are Similar for Fruits, Vegetables, and Snack Foods**

<http://www.ers.usda.gov/Publications/err55/>

For commonly consumed fresh fruits and vegetables for which quality has remained fairly constant, analysis of price trends reveals a price decline similar to that of dessert and snack foods. This price trend evidence suggests that the price of a healthy diet has not changed relative to an unhealthy one.

#### **4. Fruit and Vegetable Backgrounder**

<http://www.ers.usda.gov/Publications/vgs/apr06/VGS31301/>

*Fruit and Vegetable Backgrounder* describes the economic characteristics of the U.S. fruit and vegetable industry, providing supply, demand, and policy background for an industry that accounts for nearly a third of U.S. crop cash receipts and a fifth of U.S. agricultural exports. A variety of challenges face this complex and diverse industry in both domestic and international markets, ranging from immigration reform and its effects on labor availability, to international competitiveness.

## **5. Factors Affecting Carrot Consumption in the United States**

<http://www.ers.usda.gov/publications/vgs/2007/03Mar/VGS31901/>

Examines the consumption distribution of fresh-market (including fresh-cut) and processed carrots in the United States. The majority of carrots are purchased at retail and consumed at home, with at-home per capita consumption of fresh baby/cut carrots greatest in the central and eastern regions. Non-Hispanic Whites and Asians were found to consume the most carrots.

## **Data Tables**

The following links provide the most recent data on vegetables and melons. You may choose links for Adobe Acrobat (.pdf) table compilations or the original Excel workbook (spreadsheet) tables:

### **1. Per capita availability (a.k.a. domestic use or consumption)**

PDF file: <http://www.ers.usda.gov/publications/vgs/tables/percap.pdf>

Excel file: <http://www.ers.usda.gov/publications/vgs/tables/percap.xls>

### **2. Vegetable prices**

PDF file: <http://www.ers.usda.gov/publications/vgs/tables/price.pdf>

Excel file: <http://www.ers.usda.gov/publications/vgs/tables/price.xls>

### **3. Fresh vegetables and melons**

PDF file: <http://www.ers.usda.gov/publications/vgs/tables/fresh.pdf>

Excel file: <http://www.ers.usda.gov/publications/vgs/tables/fresh.xls>

### **4. Processing vegetables**

PDF file: <http://www.ers.usda.gov/publications/vgs/tables/proc.pdf>

Excel file: <http://www.ers.usda.gov/publications/vgs/tables/proc.xls>

### **5. Potatoes**

PDF file: <http://www.ers.usda.gov/publications/vgs/tables/potat.pdf>

Excel file: <http://www.ers.usda.gov/publications/vgs/tables/potat.xls>

### **6. Sweet potatoes**

PDF file: <http://www.ers.usda.gov/publications/vgs/tables/swpot.pdf>

Excel file: <http://www.ers.usda.gov/publications/vgs/tables/swpot.xls>

### **7. Dry edible beans**

PDF file: <http://www.ers.usda.gov/publications/vgs/tables/drybn.pdf>

Excel file: <http://www.ers.usda.gov/publications/vgs/tables/drybn.xls>

### **8. Mushrooms**

PDF file: <http://www.ers.usda.gov/publications/vgs/tables/mush.pdf>

Excel file: <http://www.ers.usda.gov/publications/vgs/tables/mush.xls>

### **9. Vegetable and melon trade**

PDF file: <http://www.ers.usda.gov/publications/vgs/tables/trade.pdf>

Excel file: <http://www.ers.usda.gov/publications/vgs/tables/trade.xls>

### **10. Dry peas and lentils**

PDF file: <http://www.ers.usda.gov/publications/vgs/tables/drypea.pdf>

Excel file: <http://www.ers.usda.gov/publications/vgs/tables/drypea.xls>

### **11. World vegetable production and harvested area**

PDF file: <http://www.ers.usda.gov/publications/vgs/tables/world.pdf>

Excel file: <http://www.ers.usda.gov/publications/vgs/tables/world.xls>

## 12. Mexican and Canadian vegetable production

PDF file: <http://www.ers.usda.gov/publications/vgs/tables/Mexcan.pdf>

Excel file: <http://www.ers.usda.gov/publications/vgs/tables/Mexcan.xls>

## 13. U.S. farm cash receipts and cost indicators

PDF file: <http://www.ers.usda.gov/publications/vgs/tables/Receipt.pdf>

Excel file: <http://www.ers.usda.gov/publications/vgs/tables/Receipt.xls>

## Web Sites

**A. U.S. Trade Data—FASonline:** This relatively simple, yet powerful online application allows the user to freely access and download detailed U.S. export and import data.

<http://www.fas.usda.gov/ustrade/>

**B. Vegetables and Melons:** ERS' Vegetables and Melons Briefing Room contains special articles, data sets, and links.

<http://www.ers.usda.gov/briefing/vegetables/>

**C. Potatoes:** ERS' Potato Briefing Room contains special articles, data, and links.

<http://www.ers.usda.gov/briefing/potatoes/>

**D. Tomatoes:** ERS' Tomato Briefing Room contains special articles, data, and links.

<http://www.ers.usda.gov/briefing/tomatoes/>

**E. Dry Beans, Peas, and Lentils:** ERS' Dry Bean Briefing Room contains special articles, data, and links.

<http://www.ers.usda.gov/briefing/drybeans/>

**F. USDA Market News:** Agricultural Marketing Service's web site containing fresh shipments, f.o.b. and terminal market prices, weekly truck rates, annual reports, and more.

<http://www.marketnews.usda.gov/portal/fv>

**G. NASS Vegetables:** Links to USDA, National Agricultural Statistics Service's annual and quarterly reports on vegetables & melons.

<http://usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1177>

**H. FAS, HTP:** USDA, Foreign Agricultural Service's horticultural web site, with links.

[http://www.fas.usda.gov/htp/fruit\\_veg.asp](http://www.fas.usda.gov/htp/fruit_veg.asp)

**I. Organic Farming and Marketing:** USDA, ERS Briefing Room contains articles, data, graphics, and links.

<http://www.ers.usda.gov/Briefing/Organic/>

**J. Truck Rate Report:** USDA, AMS weekly report on cost of shipping by trailer truck.

[http://www.ams.usda.gov/mnreports/wa\\_fv190.txt](http://www.ams.usda.gov/mnreports/wa_fv190.txt)

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**Price table 1—Commercial vegetables and potatoes: Indexes of prices received by U.S. growers, by month, 1997-2008 1/**

Item	Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Annual
----- 1910-14=100 -----														
Commercial vegetables 2/	1997	740	700	789	754	710	751	747	817	794	971	817	911	792
	1998	816	775	837	1,042	859	736	806	764	760	886	756	779	818
	1999	702	749	806	870	786	732	696	709	700	650	654	776	736
	2000	656	572	719	907	874	785	795	862	958	835	964	769	808
	2001	810	980	923	916	964	805	837	968	894	688	731	1,144	888
	2002	1,054	1,283	1,816	803	770	731	771	807	795	704	735	694	914
	2003	752	755	824	865	924	1,015	797	920	964	959	1,201	1,059	920
	2004	852	936	741	848	722	712	666	852	864	1,037	1,055	792	839
	2005	620	785	1,100	1,212	900	923	749	789	849	756	758	1,017	871
	2006	855	768	890	1,007	1,040	877	794	1,018	1,066	825	793	1,001	911
	2007	1,186	1,103	1,286	1,210	963	887	839	978	1,035	1,310	930	922	1,054
2008	930	799	878											
Potatoes 3/	1997	426	431	433	433	477	431	499	544	440	433	457	477	457
	1998	491	524	554	546	559	539	517	481	449	415	450	475	500
	1999	489	497	520	546	532	557	610	517	451	429	474	463	507
	2000	475	496	519	545	529	511	559	464	406	384	383	395	472
	2001	409	450	437	466	453	486	532	632	516	461	538	578	497
	2002	620	645	715	699	748	806	884	651	520	466	524	547	652
	2003	533	554	567	592	590	559	570	483	458	443	479	493	527
	2004	488	504	530	568	558	558	552	495	485	444	477	506	514
	2005	534	535	578	566	576	573	622	574	491	472	539	578	553
	2006	596	571	706	700	661	702	808	652	526	503	574	588	632
	2007	612	635	720	731	711	710	740	607	544	535	597	633	648
2008	654	680	701											
----- 1990-92=100 -----														
Commercial vegetables 2/	1997	111	105	118	113	106	112	112	122	119	145	122	136	118
	1998	122	116	125	156	129	110	121	114	114	133	113	117	123
	1999	105	112	121	130	118	110	104	106	105	97	98	116	110
	2000	98	86	107	136	131	117	119	129	143	125	144	115	121
	2001	121	147	138	137	144	120	125	145	134	103	109	171	133
	2002	158	192	272	120	115	109	115	121	119	105	110	104	137
	2003	112	113	123	129	138	152	119	138	144	143	180	159	138
	2004	127	140	111	127	108	107	100	127	129	155	158	119	126
	2005	93	117	165	181	135	138	112	118	127	113	113	152	130
	2006	128	115	133	151	156	131	119	152	160	123	119	150	136
	2007	177	165	192	181	144	133	126	146	155	196	139	138	158
2008	139	120	131											
Potatoes 3/	1997	84	85	86	85	94	85	99	107	87	85	90	94	90
	1998	97	104	109	108	111	106	102	95	89	82	89	94	99
	1999	97	98	103	108	105	110	121	102	89	85	94	91	100
	2000	94	98	103	108	105	101	110	92	80	76	76	78	93
	2001	81	89	86	92	90	96	105	125	102	91	106	114	98
	2002	123	127	141	138	148	159	175	129	103	92	104	108	129
	2003	105	110	112	117	117	110	113	96	90	87	95	97	104
	2004	96	100	105	112	110	110	109	98	96	88	94	100	102
	2005	106	106	114	112	114	113	123	113	97	93	106	114	109
	2006	118	113	139	138	131	139	160	129	104	99	113	116	125
	2007	121	128	142	144	140	140	146	120	107	106	118	125	128
2008	129	134	138											

1/ Prices for 2008 are preliminary. 2/ Includes fresh and processing vegetables. 3/ Includes fresh potatoes and dry edible beans.

For longer historical price series, see the *Vegetables and Melons Situation and Outlook Yearbook* at:

<http://usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1212>

Source: USDA, National Agricultural Statistics Service, *Agricultural Prices*.

**Price table 2--Fresh vegetables: U.S. monthly and season-average f.o.b. shipping-point prices, 2004-08 1/**

Commodity	Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Season average	Prct change	Prct change
															Mar.-Mar.	1st quarter
<i>Dollars per cwt</i>															Percent	Percent
<b>Asparagus</b>	2004	--	171.00	76.50	81.70	74.30	64.60	146.00	138.00	129.00	127.00	--	--	81.30	--	--
	2005	--	--	88.60	103.00	68.70	73.50	143.00	150.00	162.00	162.00	--	--	87.40	15.8	-28.4
	2006	--	122.00	133.00	110.00	72.70	94.10	105.00	162.00	122.00	127.00	--	--	88.90	50.1	43.9
	2007	--	--	107.00	106.00	91.90	87.70	--	--	--	--	--	--	99.10	-19.5	-16.1
	2008	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--
<b>Broccoli</b>	2004	33.60	28.50	21.60	24.00	27.20	28.70	24.20	29.70	57.00	43.90	43.70	38.50	33.20	--	--
	2005	22.60	33.30	42.60	39.80	22.40	39.70	22.40	30.50	27.70	22.40	20.40	34.10	28.50	97.2	17.7
	2006	32.50	23.80	27.60	32.40	29.00	51.10	26.20	56.90	39.40	24.60	27.40	52.80	33.70	-35.2	-14.8
	2007	69.80	25.40	27.60	36.90	26.70	24.80	28.80	38.20	41.80	61.00	38.10	40.70	36.70	0.0	46.4
	2008	47.30	22.90	28.40	--	--	--	--	--	--	--	--	--	--	2.9	-19.7
<b>Cantaloups</b>	2004	--	--	--	--	15.30	12.10	11.00	14.30	15.50	14.80	18.30	33.80	14.70	--	--
	2005	--	--	--	--	22.60	18.10	13.80	10.70	14.90	14.40	15.60	--	15.90	--	--
	2006	--	--	--	--	29.20	18.40	16.00	20.70	10.40	16.10	28.20	--	17.20	--	--
	2007	--	--	--	--	28.20	12.60	12.00	13.30	13.10	30.50	38.50	--	14.80	--	--
	2008	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--
<b>Carrots</b>	2004	24.50	24.90	24.60	24.20	24.90	22.50	20.20	18.00	16.70	16.20	17.30	17.00	20.20	--	--
	2005	20.30	21.00	21.00	21.10	21.20	21.30	21.80	21.20	21.00	21.10	23.10	22.00	20.90	-14.6	-15.8
	2006	21.70	21.50	21.50	21.50	20.80	21.40	21.50	22.40	19.30	19.80	20.20	19.10	20.60	2.4	3.9
	2007	21.00	28.10	28.30	29.60	32.00	25.90	19.70	17.10	16.10	15.80	15.80	16.20	22.60	31.6	19.6
	2008	16.20	25.90	25.90	--	--	--	--	--	--	--	--	--	--	-8.5	-12.1
<b>Cauliflower</b>	2004	27.20	42.20	24.20	23.50	28.80	46.20	27.50	26.00	31.00	32.20	27.10	40.90	30.80	--	--
	2005	27.60	38.00	50.60	36.70	29.70	38.10	25.60	31.50	28.50	19.70	23.60	44.30	30.30	109.1	24.1
	2006	33.10	24.90	35.60	44.40	27.10	27.90	24.00	28.40	47.10	20.90	34.50	41.70	32.30	-29.6	-19.4
	2007	45.70	29.40	51.40	51.60	24.90	30.00	22.30	27.90	27.20	46.20	26.60	52.40	34.30	44.4	35.1
	2008	53.40	30.20	42.60	--	--	--	--	--	--	--	--	--	--	-17.1	-0.2
<b>Celery</b>	2004	20.80	24.40	13.90	15.60	15.00	13.80	11.60	9.25	11.20	14.60	18.10	13.40	14.80	--	--
	2005	12.90	22.90	28.40	20.80	15.50	9.62	9.69	9.82	12.00	11.70	13.10	10.70	13.90	104.3	8.6
	2006	9.64	10.80	14.90	16.60	12.70	17.80	21.00	23.20	27.70	27.00	22.00	20.20	18.20	-47.5	-45.0
	2007	33.90	58.90	31.90	18.80	18.30	11.60	11.60	9.64	13.80	13.30	18.60	13.50	20.40	114.1	252.9
	2008	16.20	13.20	13.30	--	--	--	--	--	--	--	--	--	--	-58.3	-65.8
<b>Corn, sweet</b>	2004	30.30	20.90	20.30	17.20	15.60	12.50	16.60	20.90	21.30	27.50	29.30	18.10	19.30	--	--
	2005	21.30	28.60	26.10	21.50	18.00	22.50	22.30	20.40	24.70	25.50	25.70	22.40	22.10	28.6	6.3
	2006	35.00	35.00	34.00	27.10	15.40	21.50	21.00	21.70	25.10	21.10	20.70	20.80	22.90	30.3	36.8
	2007	27.40	23.70	30.20	25.60	21.40	17.30	22.20	22.80	23.20	21.40	20.60	34.10	22.20	-11.2	-21.8
	2008	30.80	23.00	28.00	--	--	--	--	--	--	--	--	--	--	-7.3	0.6
<b>Cucumbers</b>	2004	28.10	22.20	30.30	23.30	13.60	15.50	18.20	23.60	25.00	23.70	18.70	--	20.20	--	--
	2005	20.20	17.20	32.60	29.30	30.70	28.70	15.70	21.10	20.10	23.10	32.60	53.10	23.00	7.6	-13.2
	2006	23.90	27.70	40.70	29.40	21.30	24.30	26.80	27.20	22.50	18.50	29.60	27.00	25.30	24.8	31.9
	2007	30.80	35.30	33.60	21.40	28.50	23.20	18.90	24.60	29.10	25.00	22.00	18.50	24.40	-17.4	8.0
	2008	38.40	--	23.20	--	--	--	--	--	--	--	--	--	--	-31.0	-7.3
<b>Head lettuce</b>	2004	16.00	19.70	10.50	14.80	10.50	13.30	10.70	17.10	15.20	24.10	14.10	13.60	16.90	--	--
	2005	11.50	11.70	27.80	30.10	13.90	17.30	11.00	13.50	12.70	12.40	9.81	16.10	15.50	164.8	10.4
	2006	10.60	12.10	19.10	22.40	33.70	11.80	12.20	20.70	16.30	11.80	12.50	22.20	16.90	-31.3	-18.0
	2007	20.80	15.50	29.70	17.80	13.60	17.80	17.30	23.10	29.20	44.40	17.40	16.00	22.00	55.5	57.9
	2008	17.50	13.30	15.70	--	--	--	--	--	--	--	--	--	--	-47.1	-29.5
<b>Onions, dry bulb</b>	2004	13.10	12.20	11.60	19.40	17.60	16.10	13.00	9.92	8.44	6.27	6.28	5.76	9.06	--	--
	2005	5.10	4.23	4.44	17.70	19.50	17.80	16.80	11.20	10.50	12.80	11.60	9.45	12.40	-61.7	-62.7
	2006	8.53	8.19	7.60	15.20	16.30	17.80	14.90	13.30	12.40	10.40	11.40	16.60	15.70	71.2	76.6
	2007	22.10	26.20	35.00	55.20	24.20	24.60	15.40	10.50	4.90	4.22	4.66	4.13	11.50	360.5	242.5
	2008	4.54	3.55	2.11	--	--	--	--	--	--	--	--	--	--	-94.0	-87.8
<b>Snap beans</b>	2004	76.20	43.50	42.50	48.60	22.50	27.90	50.70	67.60	68.30	82.90	53.90	47.50	45.20	--	--
	2005	71.40	77.80	85.30	60.70	55.20	38.40	58.90	72.70	65.30	40.80	89.10	82.00	54.20	100.7	44.6
	2006	44.00	56.00	44.90	44.30	34.50	33.40	61.10	77.00	74.60	58.60	48.30	65.50	50.50	-47.4	-38.2
	2007	64.90	82.30	102.00	63.50	38.80	35.10	65.10	81.10	78.90	67.40	89.30	43.00	60.50	127.2	72.0
	2008	68.80	98.30	43.00	--	--	--	--	--	--	--	--	--	--	-57.8	-15.7
<b>Tomatoes</b>	2004	24.70	32.30	41.00	44.20	32.20	21.10	22.50	35.80	37.30	70.80	119.00	--	37.60	--	--
	2005	15.40	40.90	40.70	65.10	49.40	40.20	28.20	26.20	46.40	36.40	32.80	76.80	41.80	-0.7	-1.0
	2006	82.70	46.50	24.80	34.40	23.30	30.90	28.20	34.70	82.10	55.30	28.00	21.20	44.00	-39.1	58.8
	2007	35.60	31.20	26.30	52.60	35.60	29.60	26.70	28.60	33.10	41.60	58.70	81.20	34.50	6.0	-39.5
	2008	58.20	45.50	53.00	--	--	--	--	--	--	--	--	--	--	101.5	68.3

-- = Not available. 1/ 2008 prices are preliminary. One hundredweight (cwt) is equal to 100 pounds. The prices in this table can also be read as cents per pound. Prices beginning in 2006 are measured at the point of first sale. They are f.o.b. shipping point prices in prior years.

Source: USDA, National Agricultural Statistics Service, *Agricultural Prices*.

**Price table 3—Vegetables: Producer Price Indexes, by month, 1999-2008 1/**

Item	Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Annual	Change
															Mar.- Mar.
-----1982=100-----															Percent
Fresh 2/	1999	131.9	93.1	117.4	144.4	111.3	125.8	103.4	113.7	117.5	101.6	100.9	151.6	117.7	--
	2000	111.3	100.5	122.3	126.8	152.0	128.1	127.2	136.7	155.9	165.0	173.9	120.3	135.0	4.2
	2001	147.0	168.6	178.7	145.6	144.9	129.4	109.7	127.2	132.3	112.3	105.9	121.0	135.2	46.1
	2002	146.1	188.7	242.5	101.7	107.2	123.2	127.1	125.4	116.7	126.9	127.4	119.0	137.7	35.7
	2003	147.8	127.5	153.0	167.7	165.0	138.8	133.3	136.6	164.7	156.9	148.4	184.7	152.0	-36.9
	2004	143.8	125.9	140.3	133.1	132.9	101.0	102.8	128.3	141.9	200.0	211.1	143.7	142.1	-8.3
	2005	122.0	152.8	168.5	174.7	144.2	160.0	126.8	132.3	153.3	144.0	163.1	200.8	153.5	20.1
	2006	207.6	138.8	137.6	174.4	147.9	128.7	134.1	179.5	193.1	167.7	138.3	178.4	160.5	-18.3
	2007	175.3	190.3	222.4	222.5	142.1	145.4	146.0	137.8	162.7	218.3	177.4	204.5	178.7	61.6
2008	200.6	160.8	194.1											178.7	-12.7
Melons	1999	--	--	--	--	86.6	62.8	42.4	62.1	--	63.4	59.1	--	62.7	--
	2000	--	--	--	--	68.0	64.3	56.4	43.8	48.7	93.6	124.2	--	71.3	--
	2001	--	--	--	--	118.6	53.4	53.3	76.1	57.1	60.0	114.9	--	76.2	--
	2002	--	--	--	--	--	74.7	80.5	58.7	60.1	66.2	55.3	--	65.9	--
	2003	--	--	--	--	120.5	60.6	60.1	35.8	49.0	64.9	106.8	--	71.1	--
	2004	106.8	141.3	157.3	90.2	95.4	75.1	56.1	66.6	76.6	108.8	114.4	150.6	103.3	--
	2005	156.1	75.4	96.5	162.2	114.8	99.9	83.8	62.3	80.7	67.3	--	--	99.9	-38.7
	2006	--	--	99.8	99.8	95.6	93.8	70.3	80.2	75.0	76.2	105.1	154.7	95.1	3.4
	2007	126.2	102.9	96.9	127.6	153.5	74.6	60.0	71.0	87.4	122.9	175.2	165.6	113.7	-2.9
2008	140.3	138.9	86.0											113.7	-11.2
Canned 3/	1999	120.6	120.6	120.9	120.9	121.0	121.0	120.8	120.9	120.7	120.7	121.3	121.3	120.9	--
	2000	121.3	120.8	121.2	120.9	121.2	121.5	121.1	120.9	121.1	121.6	121.7	121.3	121.2	0.2
	2001	121.4	121.4	121.3	121.3	121.4	121.9	124.1	124.9	125.3	126.5	128.0	128.1	123.8	0.1
	2002	128.3	128.2	128.0	128.2	128.3	128.0	127.7	129.4	128.7	129.5	129.1	129.1	128.5	5.5
	2003	128.8	129.0	128.9	129.3	129.4	129.3	129.4	129.1	130.0	130.7	131.1	131.3	129.7	0.7
	2004	131.5	131.7	131.9	131.9	131.7	132.8	133.0	133.3	133.4	134.6	135.4	135.5	133.1	2.3
	2005	135.7	135.9	136.1	136.3	137.6	137.6	137.7	137.7	137.5	137.7	137.6	138.0	137.1	3.2
	2006	138.0	136.8	137.1	137.3	138.8	140.2	140.0	140.5	141.4	141.5	142.2	142.2	139.7	0.7
	2007	142.8	142.9	143.1	143.3	143.5	143.6	143.1	143.1	144.0	143.9	144.2	143.9	143.5	4.4
2008	148.5	148.9	149.2											143.5	4.3
Frozen	1999	125.8	126.6	125.6	126.7	125.9	126.0	126.8	126.1	126.0	126.4	125.5	125.3	126.1	--
	2000	125.4	126.2	125.7	126.3	126.3	124.9	125.9	126.4	126.2	126.9	126.1	126.2	126.0	0.1
	2001	127.6	128.5	127.7	128.7	128.4	127.7	128.9	128.8	128.8	130.0	129.2	129.1	128.6	1.6
	2002	130.0	131.1	130.1	131.2	130.7	129.7	131.4	131.3	131.5	132.2	131.9	132.6	131.1	1.9
	2003	133.4	134.1	133.3	134.0	134.1	133.9	134.9	134.2	134.2	135.2	135.1	135.0	134.3	2.5
	2004	135.1	136.0	135.3	135.3	134.3	134.7	135.4	135.8	136.8	138.1	137.2	137.0	135.9	1.5
	2005	137.3	137.3	137.4	137.5	137.5	137.4	137.2	136.8	136.6	136.7	136.1	136.4	137.0	1.6
	2006	137.3	137.7	138.7	138.6	138.8	139.5	139.4	139.3	139.9	142.0	142.7	142.6	139.7	0.9
	2007	144.0	144.0	144.0	145.2	145.9	146.7	148.2	149.3	149.9	151.5	152.5	153.2	147.9	3.8
2008	153.4	153.9	155.6											147.9	8.1
Dehydrated 4/	1999	148.0	148.0	148.4	147.7	146.1	146.1	146.0	146.5	147.1	146.7	147.4	151.1	147.4	--
	2000	148.9	149.8	149.9	149.5	149.3	149.0	148.6	144.9	144.0	144.9	143.4	140.8	146.9	1.0
	2001	139.1	135.6	136.2	136.9	139.9	140.6	140.4	140.9	142.4	142.7	144.6	145.9	140.4	-9.1
	2002	148.2	149.3	150.3	151.0	150.1	151.2	152.6	152.3	151.2	151.1	150.2	151.1	150.7	10.4
	2003	150.6	150.2	149.8	147.8	147.5	147.3	146.5	145.2	144.2	143.3	143.5	146.1	146.8	-0.3
	2004	145.4	145.1	144.5	144.4	144.2	144.2	144.3	144.1	145.7	144.8	143.9	144.5	144.6	-3.5
	2005	145.6	145.9	145.2	145.7	146.8	146.0	145.3	145.9	150.4	150.6	152.3	154.3	147.8	0.5
	2006	154.7	156.4	158.1	159.3	163.0	165.0	165.1	165.5	168.1	168.5	169.8	171.9	163.8	8.9
	2007	175.7	176.2	175.0	176.4	180.2	179.3	179.8	179.5	179.6	180.1	184.1	186.0	179.3	10.7
2008	187.5	186.3	188.1											179.3	7.5

-- = not available. 1/ Indexes for 2008 are preliminary. 2/ Excludes potatoes. 3/ Includes vegetable juices. 4/ Includes both fruits and vegetables.

Source: U.S. Department of Labor, Bureau of Labor Statistics (<http://www.bls.gov/data/home.htm>).

**Price table 4—Vegetables: Consumer Price Indexes, by month, 2003-08 1/**

Item	Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Annual
----- 1982-84=100 -----														
<b>Fresh vegetables 2/</b>	2003	253.7	250.9	250.7	244.3	246.3	250.5	248.3	245.4	247.2	251.2	253.5	263.8	250.5
	2004	265.2	262.8	261.3	251.7	251.0	247.2	244.6	245.6	248.4	270.7	291.0	295.1	261.2
	2005	271.0	263.2	267.0	280.1	280.6	266.9	268.5	261.0	265.6	274.1	274.6	288.3	271.7
	2006	300.6	289.7	279.7	276.8	275.6	272.9	271.5	274.4	294.2	301.8	288.6	286.1	284.3
	2007	298.3	308.6	302.4	299.3	293.3	283.5	280.1	274.4	282.3	292.7	300.4	306.1	293.5
	2008	317.5	305.0	301.5										
<b>Potatoes, fresh</b>	2003	230.6	226.9	227.5	225.0	231.9	231.4	235.1	238.8	233.8	223.7	217.7	214.5	228.1
	2004	228.2	226.0	230.5	224.3	229.0	237.4	240.7	238.9	228.5	232.0	226.9	230.5	231.1
	2005	237.5	235.8	228.3	235.0	239.1	246.7	256.7	263.8	258.6	265.8	253.5	251.7	247.7
	2006	261.1	264.7	264.6	261.5	270.4	276.0	282.5	293.6	290.4	278.2	267.8	266.8	273.1
	2007	272.4	269.9	276.0	277.6	284.7	291.6	294.5	283.4	283.0	278.8	278.7	274.7	280.4
	2008	282.9	286.3	285.4										
<b>Lettuce, fresh</b>	2003	223.8	219.7	222.9	227.4	253.1	266.0	243.1	226.1	260.9	250.2	259.4	301.8	246.2
	2004	271.7	245.8	242.3	232.1	224.1	221.7	219.8	228.4	229.2	236.2	249.0	276.9	239.8
	2005	258.3	237.9	253.5	287.5	271.6	257.6	247.7	247.4	249.4	258.4	258.7	260.0	257.3
	2006	260.8	258.0	254.2	267.2	285.5	264.0	246.9	265.8	274.2	269.7	265.1	281.9	266.1
	2007	292.2	294.7	287.6	283.3	265.6	261.6	254.7	260.6	273.3	298.2	295.7	295.3	280.2
	2008	292.9	282.6	278.3										
<b>Tomatoes, fresh</b>	2003	299.5	275.3	285.2	272.0	244.2	252.9	262.6	271.5	262.7	261.2	281.0	284.2	271.0
	2004	283.2	282.8	285.0	274.4	272.3	252.9	243.5	249.5	253.8	316.3	422.7	425.0	296.8
	2005	309.6	274.8	297.1	310.6	333.6	293.0	287.3	267.6	273.5	297.2	299.0	342.3	298.8
	2006	393.1	354.7	311.5	297.9	293.9	276.1	271.8	271.8	336.5	405.5	347.8	318.5	323.3
	2007	307.2	317.2	291.9	309.8	309.7	283.5	278.7	273.8	280.8	304.7	341.3	378.7	306.5
	2008	385.2	329.6	345.1										
<b>Other, fresh</b>	2003	258.7	264.1	259.2	250.7	255.6	257.9	254.2	248.1	248.0	263.9	260.9	271.0	257.7
	2004	276.2	279.0	274.2	263.7	263.0	259.8	257.1	255.3	263.5	282.8	283.5	282.5	270.1
	2005	277.9	280.8	279.4	289.9	284.8	272.2	276.0	265.2	274.0	277.4	282.7	295.2	279.6
	2006	298.2	289.6	285.8	282.4	273.5	278.2	279.1	276.1	291.5	288.1	286.8	288.0	284.8
	2007	311.5	328.6	324.9	313.0	303.4	291.9	287.7	280.4	290.3	297.3	300.6	300.4	302.5
	2008	318.2	313.8	303.3										
<b>Frozen vegetables</b>	2003	169.0	171.0	170.6	169.0	172.7	174.4	174.2	176.0	175.0	171.9	173.0	173.2	172.5
	2004	176.3	177.6	174.9	173.5	176.9	174.5	177.0	178.1	177.6	177.5	173.8	171.4	175.8
	2005	177.0	176.3	174.7	177.2	178.6	176.5	180.2	177.7	181.5	179.1	176.8	177.5	177.8
	2006	179.4	182.9	179.7	179.7	178.1	175.7	178.8	181.3	179.6	177.7	178.1	178.7	179.1
	2007	179.0	182.1	180.4	178.2	181.2	178.6	182.6	182.5	183.4	181.1	180.2	179.8	180.8
	2008	184.1	184.0	184.0										
December 1997=100														
<b>Processed fruits and vegetables</b>	2003	113.0	113.7	113.6	112.0	115.3	115.5	115.6	116.1	114.4	114.6	113.0	112.4	114.1
	2004	115.1	115.4	115.4	114.2	115.9	115.3	116.6	117.2	115.6	116.2	115.0	114.2	115.5
	2005	117.9	117.1	116.3	118.8	119.3	119.7	121.3	120.6	121.2	120.6	118.8	120.3	119.3
	2006	121.8	122.5	122.4	121.3	122.6	122.8	123.8	124.1	123.3	122.8	122.7	123.5	122.8
	2007	124.9	125.5	125.4	124.9	126.2	127.7	129.0	129.2	129.6	129.3	126.7	128.5	127.2
	2008	130.8	132.9	131.5										
<b>Canned vegetables</b>	2003	114.2	115.0	115.9	114.8	118.2	116.7	117.9	118.6	115.8	115.3	114.9	112.2	115.8
	2004	116.1	116.0	115.7	115.8	118.0	116.9	118.3	119.7	117.0	117.7	115.9	116.5	117.0
	2005	119.3	117.5	117.9	120.5	121.0	121.0	125.6	125.5	124.8	126.0	121.9	124.4	122.1
	2006	124.8	125.0	126.6	124.1	126.0	126.5	128.1	127.9	125.3	124.7	125.5	125.9	125.9
	2007	127.1	127.0	127.6	126.2	126.7	130.5	131.2	131.7	133.2	132.8	128.4	131.9	129.5
	2008	133.1	136.9	134.9										
<b>Dried beans, peas, lentils</b>	2003	109.8	109.1	108.9	109.6	108.3	109.1	109.3	108.9	109.3	109.4	109.2	108.9	109.2
	2004	108.6	109.9	110.6	110.0	109.4	110.2	110.1	110.7	108.3	111.2	111.9	113.8	110.4
	2005	115.2	116.0	116.4	118.4	117.5	118.3	118.3	118.1	118.3	118.7	118.9	116.6	117.6
	2006	117.2	117.3	117.1	119.4	118.7	119.3	120.7	121.3	120.8	120.5	121.0	123.6	119.7
	2007	126.1	124.5	126.8	129.3	131.6	133.0	134.6	135.3	136.3	136.3	136.9	139.0	132.5
	2008	141.3	145.5	141.1										

1/ Not seasonally adjusted. 2/ Includes potatoes.

Source: U.S. Department of Labor, Bureau of Labor Statistics (<http://www.bls.gov/data/home.htm>).

Price table 5—Fresh-market vegetables: U.S. average retail prices, by month, 2000-08

Item	Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Annual	Change	
															Mar.-	Mar.
															Cents/pound	
															Percent	
<b>Potatoes, white</b>	2000	39.2	40.1	39.3	38.8	37.9	37.6	39.0	40.0	37.4	36.7	35.1	34.7	38.0	--	
	2001	35.5	34.8	35.6	36.2	36.3	38.8	40.9	43.9	42.2	41.8	41.0	41.0	39.0	-9.4	
	2002	42.6	44.7	46.5	49.3	50.8	51.7	54.9	55.9	51.1	49.2	47.3	47.9	49.3	30.6	
	2003	48.3	47.2	46.3	46.6	46.6	46.2	46.4	46.4	44.4	44.1	43.8	43.9	45.9	-0.4	
	2004	45.7	44.6	45.9	46.1	43.5	46.2	47.1	46.4	44.6	45.0	44.3	44.9	45.4	-0.9	
	2005	45.8	44.8	44.0	45.0	45.2	45.5	47.7	49.1	48.2	50.5	49.9	49.8	47.1	-4.1	
	2006	50.4	51.7	51.7	52.2	53.3	54.1	55.6	57.2	56.3	54.5	51.7	51.7	53.4	17.5	
	2007	51.7	51.4	51.8	52.9	53.0	53.8	54.5	52.2	52.0	51.7	52.7	52.0	52.5	0.2	
	2008	52.5	53.1	54.2											4.6	
<b>Broccoli</b>	2000	118.2	98.9	106.9	101.3	117.4	123.6	113.9	112.0	105.2	108.0	108.5	151.8	113.8	--	
	2001	98.7	97.8	108.3	95.4	99.9	100.5	98.1	97.8	96.9	101.1	89.7	97.3	98.5	1.3	
	2002	137.4	168.1	114.7	120.4	103.6	109.3	111.9	113.5	124.7	107.3	116.5	105.2	119.4	5.9	
	2003	112.2	110.1	119.9	113.9	115.1	112.7	113.3	109.3	130.3	135.8	131.2	135.6	120.0	4.5	
	2004	131.9	121.6	112.5	102.2	110.7	106.0	106.9	106.7	120.8	139.9	133.5	141.4	119.5	-6.2	
	2005	123.5	134.6	131.8	148.9	129.9	130.7	144.2	132.0	135.2	119.6	128.8	122.9	131.8	17.2	
	2006	135.5	149.3	135.8	136.7	137.3	143.2	151.1	152.1	168.9	140.9	138.9	146.0	144.6	3.0	
	2007	182.8	172.0	145.8	154.1	141.2	137.3	147.5	154.2	153.6	174.9	174.1	165.5	158.6	7.4	
	2008	173.3	163.9	157.4											8.0	
<b>Lettuce, iceberg</b>	2000	74.8	65.0	67.1	65.0	80.3	68.6	65.6	67.3	89.7	77.2	77.4	85.1	73.6	--	
	2001	73.6	84.7	89.5	76.7	87.0	72.2	66.3	78.4	89.7	81.1	73.4	78.8	79.3	33.4	
	2002	100.3	106.1	154.2	114.7	72.0	67.5	67.4	68.9	70.2	68.7	75.4	68.0	86.1	72.3	
	2003	73.4	68.2	65.5	72.3	79.5	83.2	80.8	70.9	89.8	85.8	92.7	125.5	82.3	-57.5	
	2004	87.6	80.5	81.3	80.1	71.0	75.1	73.7	80.8	77.1	83.0	84.9	82.3	79.8	24.1	
	2005	81.7	73.0	82.9	100.4	92.6	89.5	88.5	85.5	84.8	92.6	87.3	85.4	87.0	2.0	
	2006	87.4	79.4	81.5	86.9	96.7	84.8	78.3	86.4	95.3	87.3	85.0	89.6	86.6	-1.7	
	2007	92.6	92.0	91.5	98.6	87.9	85.6	84.9	87.9	92.7	106.6	98.8	94.9	92.8	12.3	
	2008	95.0	89.5	87.3											-4.6	
<b>Tomatoes, field grown</b>	2000	144.3	128.6	136.4	148.7	136.6	131.8	128.2	126.2	131.9	138.7	150.3	156.7	138.2	--	
	2001	141.4	131.3	133.6	143.3	124.3	135.6	125.7	118.5	116.8	126.7	146.8	140.4	132.0	-2.1	
	2002	145.1	129.8	129.2	131.9	133.2	129.9	124.3	118.1	115.8	123.6	143.0	165.5	132.5	-3.3	
	2003	171.1	156.5	161.9	155.5	140.1	139.8	146.0	151.3	143.8	143.6	148.0	153.3	150.9	25.3	
	2004	147.2	151.0	152.9	151.9	151.0	133.1	125.3	131.2	132.1	171.5	233.7	246.7	160.6	-5.6	
	2005	166.0	142.8	154.8	171.0	191.1	165.5	160.7	141.6	142.9	154.7	157.4	184.8	161.1	1.2	
	2006	216.2	191.0	164.9	157.3	154.3	145.7	147.9	148.8	190.8	218.8	178.4	163.9	173.2	6.5	
	2007	162.1	164.4	155.5	163.0	168.5	151.0	148.6	148.5	149.6	164.9	185.1	214.7	164.7	-5.7	
	2008	203.2	173.5	183.5											18.0	
<b>Lettuce, romaine 1/</b>	2006	134.1	140.5	138.3	147.6	147.6	132.0	123.7	135.9	143.0	141.0	142.9	145.5	139.3	--	
	2007	161.2	181.7	163.1	154.5	150.4	142.5	134.4	137.3	149.4	157.1	175.7	177.5	157.1	17.9	
	2008	172.4	168.2	158.7											-2.7	
<b>Peppers, sweet 2/</b>	2005	--	--	--	--	--	--	--	--	--	192.7	--	--	--	--	
	2006	--	--	--	--	163.8	169.5	176.8	171.3	171.0	208.0	195.5	189.0	180.6	--	
	2007	190.5	211.9	218.2	235.2	222.6	221.9	195.3	181.6	188.7	208.0	219.8	218.7	209.4	--	
	2008	216.6	233.0	271.0											24.2	
<b>Cabbage 2/</b>	2006	--	--	--	--	--	--	--	56.1	60.0	58.5	59.5	60.6	58.9	--	
	2007	61.0	66.5	68.9	65.1	61.0	58.1	58.6	57.1	56.8	62.6	60.6	61.3	61.5	--	
	2008	62.6	58.3	58.7											-14.8	
<b>Celery 2/</b>	2007	--	128.3	--	92.1	--	82.9	--	75.1	78.0	--	--	--	91.3	--	
	2008	--	--												--	
<b>Carrots 2/</b>	2007	--	--	--	--	--	80.5	77.8	77.6	78.2	--	75.3	75.0	77.4	--	
	2008	78.0	77.7	76.8											--	

-- = not available. 1/ Romaine data was first reported by BLS in January 2006. 2/ Reported by BLS as statistically valid data are available.

Source: U.S. Department of Labor, Bureau of Labor Statistics (<http://www.bls.gov/data/home.htm>).



**Price table 6—Representative wholesale prices for selected fresh-market vegetables and melons in Chicago, 2007-08**

Commodity	Shipping point 1/	Shipping container	2007									2008			
			Apr. 2	May 1	June 1	July 2	Aug. 1	Sep. 3	Oct. 1	Nov. 1	Dec. 1	Jan. 3	Feb. 1	Mar. 3	Apr. 1
----- Dollars per unit -----															
Artichokes	CA	Carton, 24s	23.00	17.00	16.50	28.75	21.50	31.00	30.00	33.00	41.00	48.00	32.00	36.00	23.00
Beans, round green, machine-pick	FL, GA, MI	Bushel cartons	20.50	13.00	12.50	14.50	12.00	29.00	29.00	27.50	23.00	18.50	37.00	15.50	11.50
Beets, medium	TX, IL, CA	25 lb sacks/filmbags	11.00	12.00	11.50	11.50	9.50	9.00	7.00	7.00	7.50	6.75	7.25	7.00	7.50
Bok choy, baby	CA, FL	30 lb cartons	13.00	12.00	11.25	13.50	12.00	12.00	20.00	13.00	12.50	13.00	13.00	18.00	16.00
Brussels sprouts	CA, MX	25 lb cartons	15.50	45.00	44.00	--	36.00	19.00	33.00	20.00	21.50	27.50	24.00	32.00	31.00
Cabbage, round-green, medium	NY, GA	50 lb cartons	11.75	10.00	10.50	10.00	9.50	9.25	12.00	11.25	11.50	9.00	9.50	9.50	10.75
Chinese cabbage (Napa)	CA	30 lb cartons	13.00	12.00	11.25	13.50	11.00	13.00	22.50	14.00	14.00	13.00	15.00	12.00	20.00
Carrots, baby peeled	CA	Carton, 24-1 lb filmbag	18.00	17.00	16.75	17.50	17.00	17.00	17.00	17.00	17.00	17.00	17.00	17.50	17.50
Eggplant, medium	FL, GA, MX	1 1/9 bushel cartons	33.00	19.00	12.50	10.00	7.00	12.50	13.00	13.00	16.50	10.50	15.00	17.00	17.00
Garlic, white colossal	CA, MX	30 lb cartons	39.00	40.00	40.50	40.00	40.00	39.00	36.50	41.50	41.50	41.50	41.50	41.50	41.50
Greens, kale	CA	Carton, 24s	13.00	13.00	12.75	11.50	11.50	11.50	11.50	11.50	9.00	12.50	13.50	13.50	11.50
Greens, kohlrabi	CA, TX, IL	Carton, 12s/24s	24.00	25.00	21.00	21.00	21.00	22.00	22.00	22.00	20.50	20.50	24.00	20.50	20.00
Greens, turnip tops	GA, IL	Carton, 24s	9.50	10.25	10.25	9.75	9.50	11.50	13.75	10.00	10.50	10.00	11.50	10.50	11.50
Greens, mustard	CA	Carton, 24s	9.50	10.25	10.25	9.75	9.50	11.50	14.00	10.50	10.50	10.00	11.50	10.50	11.50
Greens, collards	GA, CA	Carton, 24s	9.50	10.25	10.25	9.75	9.50	11.50	13.50	10.00	11.00	10.00	11.50	10.50	11.50
Leeks	CA, IL, MX	Carton, bunched 12s	14.50	15.50	13.50	15.50	15.25	13.00	18.00	29.00	39.50	29.50	22.50	25.00	20.50
Lettuce, Boston	CA	Carton, 24s	10.00	9.50	13.00	9.50	11.00	17.00	16.00	13.00	14.50	14.50	13.00	12.50	13.00
Lettuce, Romaine	CA	Carton, 24s	13.00	10.50	10.50	11.50	11.50	17.00	17.00	17.50	12.00	15.00	14.00	14.50	12.00
Mushrooms, button, large	PA	10 lb carton	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00
Mushrooms, shiitake	PA	5 lb carton	21.00	21.00	21.00	21.00	21.00	21.00	21.00	21.00	21.00	21.00	21.00	21.00	21.00
Mushrooms, oyster	PA	5 lb carton	15.50	15.50	15.50	15.50	15.50	15.50	15.50	15.50	15.50	15.50	15.50	15.50	15.50
Mushrooms, cremini, medium	PA	10 lb carton	12.50	12.50	12.75	12.75	12.75	12.50	12.50	12.50	12.50	12.50	12.50	12.50	12.50
Mushrooms, portobellas, lrg	PA	5 lb carton	10.00	10.00	10.00	10.00	10.00	10.00	10.00	10.00	10.00	10.00	10.00	10.00	10.00
Okra, small-medium	FL, MX, TN	1/2 bushel carton	21.25	12.50	16.50	11.00	9.50	12.00	17.00	17.00	28.00	25.00	29.00	25.00	26.25
Onions, green	CA, MX	Carton, bunched 48s	8.00	9.25	16.50	12.25	12.50	13.50	12.50	17.00	20.50	17.50	24.50	13.75	11.50
Parsley, curly	CA	Cartons, bunched 60s	13.00	14.50	14.00	13.50	13.00	13.50	14.00	17.00	17.00	16.00	24.00	14.75	13.50
Peas, snow	CA, GU	10 lb carton	11.00	10.00	7.00	18.00	15.00	15.00	21.00	16.00	16.00	20.50	9.00	21.00	17.00
Peas, sugar snap	CA, GU	10 lb carton	13.50	16.00	15.00	20.00	15.00	17.00	18.00	16.00	36.50	21.50	11.00	14.50	16.00
Peppers, green bell, large	FL, CA	1 1/9 bushel carton	15.50	13.00	19.00	11.00	9.50	12.50	13.50	17.00	14.50	10.00	24.50	15.50	12.50
Peppers, jalapeno, medium	FL, GA, MI	1/2 & 5/9 bushel crates	12.00	18.00	25.00	9.50	9.75	8.00	16.00	9.50	20.00	9.50	17.50	9.50	9.50
Radishes	FL, MI	Carton, 30-6oz filmbag	9.00	9.00	9.00	10.00	8.25	10.00	10.00	9.00	9.00	10.00	9.00	8.75	8.75
Spinach, flat	CA	Cartons, bunched 24s	12.50	11.00	11.50	12.50	13.00	21.00	15.50	16.00	16.25	21.00	19.00	12.50	13.00
Squash, zucchini, medium	FL, NJ, MI	1/2 & 5/9 bushel crates	12.00	8.00	6.75	9.00	5.75	14.00	13.50	8.00	15.00	25.00	13.00	10.00	9.50
Squash, yellow straightneck, med.	FL, NJ, MI	1/2 & 5/9 bushel crates	16.50	8.50	7.00	9.00	6.75	17.00	12.00	9.00	10.50	19.00	13.00	17.00	13.00
Sweet potatoes, US #1, Beauregard	LA	40 lb carton	19.00	19.50	22.00	21.50	22.50	23.50	23.50	23.00	21.50	21.00	21.00	21.00	20.00
Tomatoes, mature green, lrg, 6x6	FL, CA, MX	25 lb carton	13.00	27.00	9.00	9.50	7.50	13.00	13.00	15.75	20.00	18.00	12.00	24.50	15.00
Tomatoes, vine ripe, md/lrg	MX, CA, FL	25 lb carton	11.50	27.00	10.75	13.00	5.50	11.00	11.00	16.25	21.00	24.50	14.50	15.00	15.50
Tomatoes, greenhse, v. ripe, md/lrg	CD, NL, MX	5 kg carton (on vine)	7.50	13.50	12.50	7.25	9.00	9.00	12.50	10.50	17.50	11.00	29.00	15.00	11.50
Tomatoes, cherry	FL, CA, MX	Flats, 12 1-pint buckets	15.50	15.00	14.50	9.50	7.00	9.00	13.00	13.00	11.50	11.00	11.00	10.50	20.00
Tomatoes, plum-type, med/lrg	FL, CA, MX	25 lb carton	10.00	14.50	5.00	11.50	11.50	16.00	24.00	19.00	20.00	19.00	11.75	19.00	14.50
Turnips, purple top, medium-large	CA, IL	25 lb filmbags	12.00	18.25	15.00	14.00	9.50	7.75	7.75	7.75	8.00	8.00	8.00	9.00	10.00
Cantaloups	CA, CR, MX	1/2-2/3 carton 15s	13.50	12.50	15.00	10.00	12.50	12.00	11.50	24.50	24.50	13.00	19.00	10.50	8.00
Honeydews	CA, HD, CR	2/3 cartons 6s	9.50	14.50	9.00	9.25	10.50	10.25	10.50	16.50	10.50	11.50	14.00	15.75	11.50
Watermelon, various red (85 lb ctn)	CA, TX, MX	Carton 3s or 4s, per lb	0.45	0.33	0.36	0.29	0.18	0.18	0.29	0.32	0.34	0.34	0.40	0.40	0.21
Watermelon, red seedless	CA, MX	Carton 4s or 5s, per lb	0.48	0.39	0.39	0.23	0.17	0.19	0.38	0.39	0.37	0.40	0.36	0.30	0.37

-- = Not available. 1/ Major shipping points by commodity into the Chicago Wholesale Market. CA=California, FL=Florida, TX=Texas, MI=Michigan, IL=Illinois, NY=New York, NJ= New Jersey, GA=Georgia, PA=Pennsylvania, LA = Louisiana, MX=Mexico, CR=Costa Rica, HD=Honduras, GU=Guatemala, CD=Canada, NL=Netherlands.

Source: USDA, Agricultural Marketing Service, *Fruit & Vegetable Market News*, FV Market News Portal, <http://marketnews.usda.gov/portal/fv>

**Price table 7—Canned vegetables: Quarterly wholesale price trends, 2000-08 1/**

Year & quarter	Sweet corn 2/		Snap beans 3/		Green peas 4/		Carrots 5/		Beets 6/		Tomato paste 7/	
	24/300	6/10	24/300	6/10	24/300	6/10	24/300	6/10	24/300	6/10	55-drum	6/10
----- Dollars/case -----											\$/lb	\$/case
<b>2000</b>												
I	7.75	13.84	7.50	11.67	8.75	14.79	7.88	10.88	8.21	11.75	0.34	19.63
II	7.84	15.00	7.50	11.92	8.84	16.33	7.88	10.88	8.38	11.38	0.34	20.04
III	7.71	15.00	7.25	12.00	8.79	16.00	7.96	11.13	8.46	11.38	0.32	19.50
IV	7.63	15.09	7.38	11.17	8.75	16.13	7.75	11.01	8.50	11.75	0.32	19.00
Average	7.73	14.73	7.41	11.69	8.78	15.81	7.87	10.97	8.39	11.57	0.33	19.54
<b>2001</b>												
I	7.25	14.75	7.25	10.25	8.63	15.46	7.75	10.88	7.75	11.75	0.31	17.88
II	7.25	14.75	7.25	10.25	8.63	15.25	7.75	10.88	7.75	11.75	0.31	17.88
III	7.67	14.92	7.67	10.42	8.96	15.42	7.92	11.05	7.92	11.75	0.32	17.88
IV	8.25	15.25	8.25	12.55	9.00	15.42	8.33	11.25	8.42	11.83	0.32	17.88
Average	7.61	14.92	7.61	10.87	8.81	15.39	7.94	11.02	7.96	11.77	0.32	17.88
<b>2002</b>												
I	9.00	15.75	9.00	14.59	9.00	15.25	9.00	12.00	9.00	12.00	0.32	17.63
II	8.33	15.08	8.33	12.05	8.75	15.08	9.00	12.00	9.00	12.00	0.31	17.80
III	8.00	14.75	8.00	10.88	8.63	15.00	9.00	11.50	9.00	12.00	0.31	18.50
IV	8.00	14.67	8.00	11.05	8.88	15.09	8.75	11.50	9.00	12.00	0.31	20.38
Average	8.33	15.06	8.33	12.14	8.82	15.11	8.94	11.75	9.00	12.00	0.31	18.58
<b>2003</b>												
I	8.00	14.00	8.00	11.13	9.00	15.42	8.63	11.50	9.00	12.00	0.32	18.46
II	8.00	14.00	8.00	11.38	9.00	15.50	8.71	11.50	9.00	12.00	0.30	19.46
III	8.00	14.00	8.00	11.75	9.00	16.00	8.63	11.50	9.00	12.00	0.29	17.63
IV	8.00	14.13	8.00	12.38	9.00	16.00	8.63	11.50	9.00	12.00	0.29	17.63
Average	8.00	14.03	8.00	11.66	9.00	15.73	8.65	11.50	9.00	12.00	0.30	18.30
<b>2004</b>												
I	8.17	14.80	8.17	14.38	9.17	16.00	8.63	11.50	9.00	12.00	0.29	18.67
II	8.42	15.46	8.33	15.92	9.13	15.75	8.75	11.50	9.00	13.00	0.30	20.25
III	8.50	15.63	8.33	16.17	9.00	15.59	9.00	11.50	9.00	14.00	0.30	20.25
IV	8.42	15.29	8.46	15.84	8.92	15.54	9.00	11.75	8.50	15.00	0.30	20.25
Average	8.38	15.30	8.32	15.58	9.06	15.72	8.85	11.56	8.88	13.50	0.30	19.86
<b>2005</b>												
I	8.58	14.08	8.54	13.54	8.96	15.67	9.00	11.75	8.83	14.58	0.30	20.25
II	8.75	13.42	8.67	13.25	9.13	15.33	9.00	11.75	9.00	14.00	0.30	20.25
III	8.67	13.58	8.71	12.83	9.13	15.42	9.00	12.00	9.00	13.63	0.31	20.54
IV	8.71	12.25	8.88	12.50	9.13	15.25	9.00	12.00	8.96	13.38	0.33	21.13
Average	8.68	13.33	8.70	13.03	9.09	15.42	9.00	11.88	8.95	13.90	0.31	20.54
<b>2006</b>												
I	8.63	12.25	8.88	12.13	9.25	15.46	9.00	12.00	9.05	12.80	0.36	21.46
II	8.63	12.25	8.75	12.13	9.17	15.50	9.00	12.00	9.03	12.25	0.37	22.58
III	8.38	11.75	8.45	12.00	8.71	15.50	9.00	12.00	8.50	11.88	0.40	23.25
IV	8.38	11.75	8.57	12.00	8.63	15.50	9.00	12.00	8.50	11.88	0.44	23.25
Average	8.51	12.00	8.66	12.07	8.94	15.49	9.00	12.00	8.77	12.20	0.39	22.64
<b>2007</b>												
I	8.38	12.50	8.63	12.38	9.25	15.50	8.88	12.00	8.43	13.10	0.46	23.25
II	8.60	13.00	8.73	13.13	9.17	16.00	8.88	12.00	8.71	11.90	0.46	23.25
III	9.16	13.33	8.95	13.30	8.71	16.00	8.88	12.00	8.85	11.97	0.43	23.25
IV	9.38	13.83	9.00	13.92	9.38	16.00	8.88	12.00	8.85	12.67	0.41	23.41
Average	8.88	13.17	8.83	13.18	9.13	15.88	8.88	12.00	8.71	12.41	0.44	23.29
<b>2008</b>												
I p	9.10	14.73	9.10	14.58	9.38	16.05	9.00	12.00	9.13	14.05	0.42	22.20
II f	9.63	15.00	9.10	14.76	9.30	16.52	9.00	12.00	9.15	14.05	0.43	22.50
III f	9.63	15.00	9.33	14.50	8.83	16.52	9.00	12.00	9.00	13.50	0.43	23.00
IV f	9.50	15.25	9.39	14.50	8.80	16.52	9.00	12.00	9.00	13.50	0.45	23.50
Average	9.46	15.00	9.23	14.59	9.08	16.40	9.00	12.00	9.07	13.78	0.43	22.80

p = Preliminary. f = ERS forecast. -- = not available.

1/ Some prices calculated as averages of quoted ranges. 2/ Whole kernel corn, Midwest. 3/ 4-sieve cut, Midwest. 4/ 4-sieve, Midwest. 5/ Medium sliced, Midwest. 6/ Medium sliced, Midwest. 7/ 26-percent solids for 6/10 and 31 percent for 55-gallon drum, California.

Source: American Institute of Food Distribution, *Price Trends*.

**Price table 8—Frozen vegetables: Quarterly wholesale price trends, 2000-08 1/**

Year and quarter	Sweet corn 2/		Snap beans 3/		Green peas 4/		Cauliflower 4/		Broccoli 6/		Spinach 7/	
	12/16	12/2.5	12/16	12/2	12/16	12/2.5	12/16	12/2	24/10	12/2	24/10	12/3
----- Dollars/case -----												
<b>2000</b>												
I	6.83	0.48	6.83	0.47	6.93	0.54	9.47	0.70	10.15	0.72	8.30	0.43
II	6.83	0.48	6.83	0.47	6.93	0.54	9.47	0.70	10.15	0.72	8.30	0.43
III	6.83	0.47	6.83	0.47	6.93	0.54	9.47	0.70	10.15	0.72	8.30	0.43
IV	6.83	0.47	6.83	0.47	6.93	0.54	9.47	0.70	10.15	0.72	8.30	0.43
Average	6.83	0.47	6.83	0.47	6.93	0.54	9.47	0.70	10.15	0.72	8.30	0.43
<b>2001</b>												
I	6.83	0.46	6.83	0.47	6.93	0.53	9.47	0.70	10.15	0.72	8.30	0.43
II	6.83	0.46	6.84	0.47	6.88	0.53	9.47	0.70	10.15	0.72	8.30	0.43
III	6.88	0.49	6.85	0.47	6.88	0.55	9.50	0.72	10.15	0.72	8.30	0.45
IV	6.88	0.49	6.85	0.49	6.88	0.55	9.50	0.72	10.15	0.72	8.30	0.45
Average	6.86	0.47	6.84	0.48	6.89	0.54	9.49	0.71	10.15	0.72	8.30	0.44
<b>2002</b>												
I	6.88	0.49	6.93	0.49	6.88	0.55	9.50	0.72	10.15	0.72	8.30	0.48
II	7.10	0.50	7.10	0.50	7.05	0.55	9.49	0.72	10.15	0.72	8.30	0.48
III	7.10	0.50	7.10	0.51	7.07	0.55	9.47	0.72	10.15	0.72	8.30	0.48
IV	7.10	0.51	7.10	0.54	7.10	0.55	9.47	0.72	10.15	0.72	8.30	0.48
Average	7.05	0.50	7.06	0.51	7.02	0.55	9.48	0.72	10.15	0.72	8.30	0.48
<b>2003</b>												
I	7.10	0.55	7.10	0.54	7.10	0.55	9.47	0.72	10.15	0.72	8.30	0.48
II	7.10	0.55	7.10	0.54	7.10	0.55	9.47	0.72	10.15	0.72	8.30	0.48
III	7.10	0.55	7.10	0.54	7.10	0.55	9.47	0.72	10.15	0.72	8.30	0.48
IV	7.10	0.55	7.10	0.54	7.10	0.55	9.47	0.72	10.15	0.72	8.30	0.48
Average	7.10	0.55	7.10	0.54	7.10	0.55	9.47	0.72	10.15	0.72	8.30	0.48
<b>2004</b>												
I	7.10	0.55	7.10	0.54	7.10	0.55	9.50	0.72	10.15	0.72	8.30	0.48
II	7.10	0.55	7.10	0.54	7.38	0.55	9.50	0.72	10.15	0.72	8.30	0.48
III	7.38	0.56	7.38	0.58	7.38	0.58	9.50	0.72	10.15	0.72	8.30	0.50
IV	7.30	0.54	7.33	0.58	7.28	0.57	9.50	0.72	10.15	0.72	8.30	0.50
Average	7.22	0.55	7.23	0.56	7.29	0.56	9.50	0.72	10.15	0.72	8.30	0.49
<b>2005</b>												
I	7.00	0.48	7.33	0.57	7.28	0.52	9.47	0.72	10.15	0.72	8.30	0.52
II	7.04	0.47	7.33	0.56	7.28	0.52	9.47	0.72	10.15	0.72	8.30	0.52
III	7.12	0.48	7.33	0.56	7.28	0.52	9.47	0.72	10.15	0.72	8.30	0.53
IV	7.10	0.48	--	0.56	7.28	0.52	9.47	0.72	10.15	0.72	8.30	0.52
Average	7.07	0.48	7.33	0.56	7.28	0.52	9.47	0.72	10.15	0.72	8.30	0.52
<b>2006</b>												
I	7.10	0.50	7.25	0.56	7.28	0.52	9.47	0.72	10.15	0.72	8.32	0.52
II	7.35	0.50	7.63	0.56	7.63	0.55	9.47	0.72	10.30	0.72	8.81	0.49
III	7.58	0.50	7.63	0.56	7.34	0.54	9.47	0.72	10.38	0.73	8.88	0.50
IV	7.58	0.50	7.63	0.56	7.20	0.54	9.47	0.72	10.38	0.73	8.88	0.50
Average	7.40	0.50	7.53	0.56	7.36	0.54	9.47	0.72	10.30	0.72	8.72	0.50
<b>2007</b>												
I	7.58	0.44	7.63	0.56	7.20	0.54	9.47	0.72	10.38	0.73	8.88	0.50
II	7.50	0.48	7.61	0.57	7.49	0.55	9.47	0.72	10.38	0.73	8.88	0.50
III	7.58	0.44	7.95	0.59	7.34	0.54	9.47	0.72	10.38	0.73	8.88	0.48
IV	7.84	0.44	7.75	0.59	7.60	0.54	9.47	0.72	10.42	0.79	8.71	0.50
Average	7.63	0.45	7.74	0.58	7.41	0.54	9.47	0.72	10.39	0.74	8.84	0.50
<b>2008</b>												
I p	7.88	0.44	7.75	0.59	7.38	0.60	9.47	0.72	10.75	0.83	8.73	0.50
II f	7.84	0.44	7.75	0.59	7.60	0.60	9.47	0.72	10.42	0.83	8.75	0.50
III f	7.84	0.44	7.75	0.59	7.60	0.60	9.47	0.72	10.42	0.83	8.75	0.50
IV f	7.84	0.44	7.75	0.59	7.60	0.60	9.47	0.72	10.42	0.83	8.75	0.50
Average	7.85	0.44	7.75	0.59	7.55	0.60	9.47	0.72	10.50	0.83	8.75	0.50

p = Preliminary. Except for peas and broccoli, foodservice prices carried over from the 4th quarter of 2007. f = ERS forecast.

1/ Some prices calculated as averages of quoted ranges. 2/ Whole kernel (cut) corn, f.o.b. West Coast basis. 3/ Regular cut. 4/ Poly bags. 5/ Sliced, poly bags. 6/ Spears. 7/ Chopped. F.o.b. West Coast.

Source: American Institute of Food Distribution, *Price Trends*.

**Price table 9—Potatoes and pulses: Prices received by U.S. growers, by month, 2001-08 1/**

Item	Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Season average
----- Dollars/hundredweight (cwt) -----														
<b>Potatoes, all uses</b>	2001	4.72	5.28	5.12	5.47	5.22	5.71	6.36	7.20	6.23	5.28	6.16	6.73	6.99
	2002	7.34	7.33	8.24	8.01	8.59	9.38	10.59	7.39	6.29	5.53	6.24	6.62	6.67
	2003	6.44	6.47	6.79	6.99	6.94	6.67	6.84	5.57	5.24	5.03	5.42	5.76	5.89
	2004	5.70	5.87	6.09	6.62	6.47	6.47	6.44	5.60	5.23	4.61	4.89	5.28	5.66
	2005	5.64	5.79	6.44	6.20	6.23	6.30	7.05	6.61	5.69	5.37	6.36	6.89	7.06
	2006	7.08	6.76	8.50	8.35	7.83	8.41	9.77	7.70	6.12	5.76	6.59	6.79	7.33
	2007	7.16	7.42	7.93	8.71	7.95	7.75	8.48	6.85	5.92	5.78	6.55	7.06	7.12
	2008	7.33	7.51	7.82										
<b>Potatoes, table stock</b>	2001	3.54	5.41	4.48	5.53	7.23	8.31	8.93	12.96	10.96	8.69	8.68	9.37	10.79
	2002	10.49	11.63	13.19	12.17	14.69	16.28	16.70	15.31	11.52	8.34	8.62	8.60	9.59
	2003	8.09	8.54	8.58	8.80	9.09	9.16	8.96	8.04	7.08	6.95	6.70	6.52	7.32
	2004	6.26	6.68	7.20	7.82	7.76	9.04	9.07	7.87	6.97	5.09	4.89	5.56	6.75
	2005	6.13	6.58	8.04	7.22	7.43	8.23	10.37	11.30	10.77	8.90	9.02	9.17	10.36
	2006	9.58	9.13	13.78	12.32	10.51	11.90	13.14	13.99	9.67	9.06	8.34	8.38	10.27
	2007	9.11	10.10	11.04	13.03	11.08	10.31	11.33	10.42	7.92	7.87	8.32	8.65	9.53
	2008	9.26	9.86											
<b>Potatoes, processing</b>	2001	4.95	5.15	5.10	5.19	5.10	4.96	5.24	4.43	4.56	4.47	4.89	5.15	5.05
	2002	5.37	5.27	5.34	5.66	6.02	5.83	6.09	4.67	4.62	4.79	5.14	5.35	5.16
	2003	5.38	5.32	5.28	5.33	5.59	5.60	5.39	4.69	4.64	4.52	4.85	5.31	5.10
	2004	5.29	5.24	5.24	5.54	5.64	5.54	5.30	4.76	4.60	4.45	4.88	5.10	5.06
	2005	5.29	5.30	5.37	5.47	5.68	5.51	5.45	4.92	4.65	4.66	4.89	5.51	5.39
	2006	5.65	5.59	5.74	6.04	6.30	6.46	6.51	5.47	5.22	5.10	5.70	5.96	5.90
	2007	6.14	6.04	6.36	6.56	6.74	6.71	6.53	5.51	5.34	5.32	5.64	6.07	5.86
	2008	6.17	6.25											
<b>Dry edible beans</b>	2001	15.10	15.30	14.90	15.60	16.90	16.40	16.80	17.40	18.40	19.20	22.70	21.70	22.10
	2002	21.50	26.10	27.10	27.50	27.80	27.40	24.50	23.20	17.90	16.60	15.90	16.10	17.10
	2003	16.40	19.20	15.90	18.70	19.10	16.60	17.20	18.00	17.60	17.60	19.10	17.40	18.40
	2004	17.20	17.50	20.20	19.60	19.90	20.00	19.20	20.90	22.80	24.50	25.90	27.00	25.70
	2005	27.20	27.80	26.60	28.70	31.10	27.70	25.40	21.40	18.00	18.80	18.00	18.10	18.50
	2006	19.20	17.40	17.10	18.90	19.30	19.00	21.70	19.50	18.80	19.50	21.80	21.80	22.10
	2007	22.70	25.40	25.70	24.50	24.40	24.40	28.50	25.70	24.50	25.90	28.40	27.00	26.40
	2008	27.30	32.20	32.20										
<b>Green peas, whole-dry 2/</b>	2001	5.84	6.28	6.44	6.53	6.43	6.28	6.25	6.19	6.21	6.35	6.56	6.88	6.80
	2002	7.04	7.06	7.13	7.40	7.25	7.25	7.25	7.13	7.38	7.68	7.91	8.33	8.89
	2003	9.08	9.81	10.88	10.60	10.44	9.92	9.30	7.56	7.63	8.09	8.84	9.08	9.26
	2004	9.56	9.94	10.50	10.56	10.88	8.43	7.38	6.45	6.41	6.66	6.93	6.69	6.36
	2005	6.63	6.56	6.03	5.69	5.47	5.38	5.31	5.15	4.84	4.81	4.80	4.75	5.26
	2006	4.97	5.31	5.50	5.78	6.00	5.91	5.84	5.93	6.44	6.70	7.19	7.58	8.07
	2007	7.81	8.69	9.50	10.25	10.43	10.44	10.68	10.88	11.88	13.25	13.75	13.75	14.50
	2008	15.81	18.88	18.92	18.88									
<b>Yellow peas, whole-dry 2/</b>	2001	5.81	6.31	6.44	6.38	6.40	6.25	6.25	6.19	6.17	6.25	6.56	6.79	6.90
	2002	7.04	7.25	7.31	7.68	7.66	7.59	7.38	6.50	6.72	7.10	7.34	7.58	7.66
	2003	7.42	7.94	8.03	8.50	8.75	8.67	8.44	6.63	6.43	6.75	7.53	7.75	7.97
	2004	7.91	8.72	9.03	9.25	9.42	7.73	7.13	6.08	5.97	6.25	6.43	6.25	6.05
	2005	6.00	6.00	5.73	5.56	5.59	5.55	5.25	5.15	4.66	4.63	4.63	4.63	4.99
	2006	4.75	4.97	5.00	5.25	5.50	5.50	5.53	5.35	5.78	6.10	6.66	7.04	7.30
	2007	7.13	7.94	8.63	8.75	9.20	9.50	9.60	9.75	10.69	11.80	13.00	13.25	12.75
	2008	14.81	15.19	15.38	18.00									
<b>Lentils, regular (Brewer) 2/</b>	2001	10.84	10.50	10.22	10.25	9.90	9.91	9.78	9.84	9.83	9.75	9.72	9.71	9.58
	2002	9.44	9.06	9.03	9.75	9.59	9.44	9.40	9.50	10.75	12.85	13.81	14.25	14.84
	2003	15.42	17.63	18.63	18.70	18.63	18.56	15.20	14.50	14.85	16.50	16.88	16.50	17.41
	2004	17.13	19.00	20.90	21.25	20.38	15.80	14.19	13.25	14.38	15.56	15.95	15.38	13.93
	2005	14.69	14.19	13.45	12.56	12.19	11.40	11.25	11.25	11.34	11.25	10.78	10.08	10.77
	2006	10.38	10.31	10.25	10.69	10.75	10.94	10.94	12.25	13.06	14.15	14.25	14.50	14.01
	2007	14.59	14.81	14.75	14.75	14.85	15.25	15.25	18.00	20.50	24.40	28.00	30.00	27.00
	2008	30.00	30.00	30.00	34.50									

-- = not available. 1/ Prices for 2008 are preliminary. 2/ Grower bids for U.S. no. 1 grade reported by the *Bean Market News* for Idaho & Washington. The season averages for peas and lentils presented here are calculated by ERS based on a July-June marketing year.

Sources: USDA, National Agricultural Statistics Service, *Agricultural Prices*, and USDA, Agricultural Marketing Service, *Bean Market News*.

**Price table 10—U.S. fresh-market herbs: Selected monthly wholesale prices in San Francisco, CA, 2007-08**

Herb	Unit	2007			2008			Change from prev. year		
		Jan.	Feb.	Mar.	Jan.	Feb.	Mar.	Jan.	Feb.	Mar.
		----- Dollars/hundredweight (cwt) -----						----- Percent -----		
Anise	24-ct crtn	22.80	35.25	28.38	13.50	16.50	18.50	- 40.8	- 53.2	- 34.8
Arrugula	12-ct ctns	7.50	7.50	8.00	8.00	8.00	8.00	6.7	6.7	.0
Basil	12-ct ctns	8.50	8.50	8.50	8.25	9.37	9.45	- 2.9	10.2	11.2
Celeriac	12-ct ctns	13.00	13.00	13.00	12.50	12.50	12.50	- 3.8	- 3.8	- 3.8
Chervil	12-ct flmbag	6.50	6.50	6.88	6.75	6.00	6.00	3.8	- 7.7	- 12.8
Chives	12-ct flmbag	5.75	5.75	6.00	7.75	7.75	7.60	34.8	34.8	26.7
Cilantro	60-ct ctns	22.95	17.88	11.44	25.32	16.06	11.63	10.3	- 10.2	1.7
Cipolinos	10-lb ctns	17.50	17.50	17.50	17.50	18.00	18.00	.0	2.9	2.9
Dill	12-ct ctns	7.50	9.00	8.44	8.00	8.19	9.69	6.7	- 9.0	14.8
Dry Eschallot	5-lb sack	5.75	5.75	5.75	5.09	5.63	5.50	- 11.5	- 2.1	- 4.3
Horseradish	5-lb bag	2.08	2.08	2.15	2.15	2.37	2.50	3.4	13.9	16.3
Lemon grass	Per lb-ctns	0.80	1.25	1.85	2.25	1.44	0.90	181.3	15.2	- 51.4
Marjoram	12-ct flmbag	5.88	5.88	5.88	5.75	5.75	5.75	- 2.2	- 2.2	- 2.2
Oregano	12-ct flmbag	5.63	5.63	5.75	5.63	5.69	5.75	- .1	1.1	.0
Rosemary	12-ct flmbag	5.63	5.63	5.75	5.63	5.69	5.75	.0	1.1	.0
Mint	12-ct ctns	8.00	8.50	9.25	8.00	8.88	9.25	.0	4.5	.0
Sage	12-ct flmbag	5.63	5.63	5.75	5.63	5.69	5.75	.0	1.1	.0
Salsify	5-1kg flmbg	29.00	29.00	29.00	29.25	29.13	29.00	.9	.4	.0
Savory	24-ct flmbag	5.63	5.63	5.75	5.63	5.69	5.75	.0	1.1	.0
Sorrel	12-ct flmbag	5.63	5.63	5.75	5.63	5.69	5.75	.0	1.1	.0
Tarragon	12-ct flmbag	6.50	6.50	7.50	7.50	7.33	6.81	15.4	12.8	- 9.2
Thyme	12-ct flmbag	5.63	5.63	5.75	5.63	5.69	5.75	.0	1.1	.0
Verdulaga	24-ct ctns	8.50	8.50	8.50	8.50	--	--	.0	--	--
Watercress	12-ct ctns	11.70	12.50	12.50	14.50	14.50	14.50	23.9	16.0	16.0

-- = not available.

Source: Derived from data provided by USDA, Agricultural Marketing Service, FV Data Portal, <http://marketnews.usda.gov/portal/fv>

**Price table 11—Farm-retail price spreads, 2005-07**

Item	Annual			2007						
	2005	2006	2007	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
<b>Market basket</b>										
Retail cost (1982-84=100)	198.2	201.8	211.0	210.4	210.9	211.6	213.3	214.5	215.5	216.4
Farm value (1982-84=100)	122.2	119.5	141.9	139.6	144.4	143.6	148.0	146.4	151.0	152.2
Farm-retail spread (1982-84=100)	239.2	246.2	248.3	248.5	246.8	248.3	248.4	251.2	250.2	251.0
Farm value-retail cost (percent)	21.6	20.7	23.6	23.2	24.0	23.8	24.3	23.9	24.5	24.6
<b>Fresh fruit</b>										
Retail cost (1982-84=100)	330.7	350.6	367.6	363.7	352.2	353.0	365.2	369.1	381.0	385.1
Farm value (1982-84=100)	173.4	195.8	193.4	197.0	191.5	188.5	202.1	188.9	214.2	214.2
Farm-retail spread (1982-84=100)	403.3	422.1	448.1	440.7	426.4	429.0	440.5	452.3	458.0	464.0
Farm value-retail cost (percent)	16.6	17.6	16.6	17.1	17.2	16.9	17.5	16.2	17.8	17.6
<b>Fresh vegetables</b>										
Retail cost (1982-84=100)	271.7	283.0	293.5	283.5	280.1	274.4	282.3	292.7	300.4	306.1
Farm value (1982-84=100)	145.5	156.7	169.0	161.9	146.8	127.6	126.9	151.7	141.3	165.5
Farm-retail spread (1982-84=100)	336.7	347.9	357.4	346.0	348.6	349.9	362.2	365.2	382.2	378.4
Farm value-retail cost (percent)	18.2	18.8	19.6	19.4	17.8	15.8	15.3	17.6	16.0	18.4
<b>Processed fruits and vegetables</b>										
Retail cost (1982-84=100)	192.3	201.2	208.7	209.5	211.5	211.9	212.6	212.1	207.7	210.7
Farm value (1982-84=100)	137.7	140.1	145.8	144.9	146.9	146.4	146.1	147.2	148.7	150.0
Farm-retail spread (1982-84=100)	209.4	220.3	228.3	229.6	231.6	232.3	233.4	232.3	226.1	229.6
Farm value-retail cost (percent)	17.0	16.6	16.6	16.4	16.5	16.4	16.3	16.5	17.0	16.9
<b>Fats and oils</b>										
Retail cost (1982-84=100)	167.7	167.8	172.9	171.6	173.7	174.3	174.1	173.7	174.3	174.1
Farm value (1982-84=100)	108.2	101.9	150.9	148.0	153.3	148.6	162.6	153.3	148.6	162.6
Farm-retail spread (1982-84=100)	189.6	192.1	181.1	180.3	181.2	183.7	178.3	181.2	183.7	178.3
Farm value-retail cost (percent)	17.3	16.3	23.5	23.2	23.7	22.9	25.1	23.7	22.9	25.1
<b>Meat products</b>										
Retail cost (1982-84=100)	187.5	188.9	195.0	197.7	196.2	196.1	196.2	196.6	196.8	195.6
Farm value (1982-84=100)	121.4	116.7	124.7	119.6	120.4	123.8	126.9	123.9	125.1	124.3
Farm-retail spread (1982-84=100)	255.4	263.0	267.1	277.8	274.0	270.3	267.3	271.2	270.4	268.8
Farm value-retail cost (percent)	32.8	31.3	32.4	30.6	31.1	32.0	32.8	31.9	32.2	32.2
<b>Dairy products</b>										
Retail cost (1982-84=100)	182.4	181.2	194.8	191.4	197.9	201.7	203.5	205.3	206.0	205.3
Farm value (1982-84=100)	118.7	101.7	152.9	159.8	173.1	173.5	174.0	172.1	175.3	170.9
Farm-retail spread (1982-84=100)	241.1	254.5	233.3	220.5	220.8	227.7	230.7	235.9	234.3	237.0
Farm value-retail cost (percent)	31.2	26.9	37.7	40.1	42.0	41.3	41.0	40.2	40.8	39.9
<b>Poultry</b>										
Retail cost (1982-84=100)	185.3	182.0	191.4	194.4	194.9	195.4	197.1	195.6	194.6	194.0
Farm value (1982-84=100)	139.4	128.5	154.8	166.1	165.1	163.2	159.3	146.3	151.8	144.7
Farm-retail spread (1982-84=100)	238.1	243.7	233.4	227.0	229.2	232.5	240.6	252.4	243.9	250.8
Farm value-retail cost (percent)	40.3	37.8	43.3	45.7	45.3	44.7	43.3	40.0	41.7	39.9
<b>Eggs</b>										
Retail cost (1982-84=100)	144.1	150.6	195.3	176.3	188.1	196.4	211.6	208.0	214.7	234.0
Farm value (1982-84=100)	60.1	69.5	136.3	85.4	139.6	123.1	165.0	137.8	202.8	220.0
Farm-retail spread (1982-84=100)	295.2	296.2	301.3	339.6	275.3	328.1	295.3	334.1	236.1	259.2
Farm value-retail cost (percent)	26.8	29.7	44.8	31.1	47.7	40.3	50.1	42.6	60.7	60.4
<b>Cereal and bakery products</b>										
Retail cost (1982-84=100)	209.0	213.0	222.1	222.6	223.3	224.0	223.4	224.7	225.7	226.5
Farm value (1982-84=100)	96.4	111.1	149.5	138.8	143.1	148.1	166.6	192.5	177.9	187.3
Farm-retail spread (1982-84=100)	224.6	227.2	232.2	234.3	234.5	234.6	231.3	229.2	232.4	232.0
Farm value-retail cost (percent)	5.7	6.4	8.2	7.6	7.8	8.1	9.1	10.5	9.7	10.1

1/ Retail costs are based on CPI-U of retail prices for domestically produced farm foods, published monthly by the Bureau of Labor Statistics (BLS). Farm value is the payment for the quantity of farm equivalent to the retail unit, less allowance for byproduct. Farm values are based on prices at first point of sale, and may include marketing charges such as grading and packing for some commodities. The farm-retail spread, the difference between the retail value and farm value, represents charges for assembling, processing, transporting, and distributing.

Source: USDA, ERS, <http://www.ers.usda.gov/publications/agoutlook/aotables/2008/03Mar/aotab08.xls>