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Vegetables and Melons Outlook

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Smaller Dry Bean Crop Expected

The first estimate of the U.S. dry edible bean crop indicated a 15-percent reduction in output in 2006. Due largely to lower yields, production is expected to decline in 11 of the 18 surveyed States, with the largest reductions expected in important producing States such as Colorado, North Dakota, Nebraska, and Minnesota. Output is expected to be down 27 percent in North Dakota, which produced 29 percent of the U.S. dry bean crop over the past 3 years. National area intended for harvest was down 3 percent, due mostly to smaller plantings of pinto, kidney, and small red beans. Planted area was lower for 9 of the 15 dry bean classes surveyed.

U.S. potato growers expect to harvest 0.99 million acres this fall—up 3 percent from a year earlier and the first increase since 2002. North Dakota (up 16 percent) and Idaho (up 2 percent) each expect to harvest more area than a year ago. It is uncertain whether the projected increase in area harvested will push production higher. Because of periods of extreme summer heat and patchy rain, declining fall crop per acre yields could offset expected larger harvested area, leaving production close to year-earlier levels.

With higher energy costs and slightly higher shipping-point prices (up 2 percent), consumer prices for fresh-market vegetables averaged 4 percent above a year earlier during the first 7 months of 2006. Retail prices averaged higher for potatoes (up 16 percent), broccoli (up 5 percent), and tomatoes (up 2 percent). Despite various weather extremes, during the first 7 months of 2006, the volume of fresh vegetable shipments (excluding potatoes and melons) managed to rise slightly from a year earlier.

Processors of the five major vegetables (tomatoes, sweet corn, snap beans, green peas, and cucumbers for pickles) have contracted 1.21 million acres in 2006—down 1 percent from acreage in the comparable producing States of a year earlier. Due to periods of extreme heat this summer, yields are expected to be below the average of the past 3 years for most crops. However, larger area for green peas and tomatoes is expected to outweigh reductions in yields and leave total production of the five leading canning vegetables up from the 13.2 million short tons of 2005.

Total U.S. mushroom sales volume declined 1 percent to 843 million pounds as a 2 percent drop in growing area outweighed a 1 percent gain in yield, which reached a record-high 5.92 pounds per square foot. Fresh agaricus sales volume recovered most of its loss of a year ago, rising 1 percent to 701 million pounds—84 percent of all agaricus sales. On the processing side, agaricus sales volume dropped 9 percent from a year earlier and now stands 46 percent below a decade earlier.

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The next release is
October 19, 2006

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World Agricultural
Outlook Board

Industry Overview

Fresh vegetables: Despite the prospect that extreme summer heat would reduce yields, a 4 percent increase in area for harvest is expected to cause production of summer storage onions (the primary source of onions during the fall and winter) to rise slightly from the 50 million hundredweight (cwt) of 2005. This crop will transition from the summer nonstorage onion crop, which is expected to total 10.9 million cwt—down 3 percent from a year earlier. Following a spring with weak prices, fresh dry-bulb onion prices have strengthened this summer and are expected to maintain much of this price momentum into the fall.

Melons: This summer (largely July-September), area for harvest of the three leading melon crops was estimated to be 108,200 acres—3 percent below a year earlier. Increased honeydew area (up 4 percent) will likely be outweighed by lower area for watermelon (down 2 percent) and cantaloup (down 6 percent). The July wholesale price for all melons averaged 9 percent below a year earlier.

Processing vegetables: Processors of the five leading vegetables (tomatoes, sweet corn, snap beans, green peas, and cucumbers for pickles) have contracted 1.21 million acres in 2006—down 1 percent from the comparable producing States of a year earlier. Contract production accounted for 97 percent of the output of the five leading processing vegetables last year. Area for tomatoes, the single largest processing vegetable (in terms of output), is expected to be 8 percent greater than a year ago due to lower carryover stocks and strong wholesale prices. For the second consecutive year, tomato yields in California are expected to average below trend due to the cool, wet start to the season and periods of extreme heat this summer.

Potatoes: The 2006 fall potato crop was planted on 990,500 acres, up 2 percent from a year earlier. Although area was up in many States, about two-thirds of the increase came from North Dakota and Minnesota. Across all four seasons in 2006, planted acreage totaled 1.12 million acres—3 percent above a year earlier. Potato acreage a year ago was the smallest since estimates began in 1866. Despite somewhat larger crops both here and in Canada, fall and winter prices are expected to average above those of a year earlier at each step of the marketing chain.

Sweet potatoes: In 2006, the total area for harvest for sweet potatoes is estimated to be 93,400 acres, 6 percent above a year earlier. This increase is largely due to added area in North Carolina, the top producing State with 42 percent of total area. Assuming average yields, production is expected to rise this fall.

Dry beans: U.S. dry bean harvested area was estimated to be down 3 percent to 1.52 million acres. Given August acreage estimates and expectations for below-average yields, production could decline for pinto, small red, light red kidney, and dark red kidney beans, while rising for black beans and garbanzo beans.

Dry peas and lentils: According to USDA estimates, area for harvest of dry peas is up 12 percent in 2006, while lentil area is expected to decline 8 percent. Despite prospects for below-average yields due to this summer's heat, production of dry edible peas could exceed last year's record high.

Mushrooms: Intended agaricus bed and tray production area for the 2006/07 season is forecast to decline 3 percent from a year earlier to 136 million square feet. While growers in Eastern and Central States each intend to reduce area, those in Western States expect to increase area, led by a 3-percent gain in California.

Table 1--U.S. vegetable industry at a glance, 2003-06

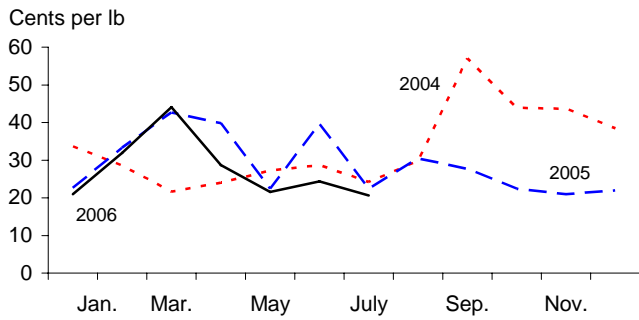
Item	Unit	2003	2004	2005	2006 1/
<i>Area harvested</i>	1,000 ac.	6,538	6,581	7,149	7,242
<i>Vegetables:</i>					
Fresh & melons	1,000 ac.	1,928	1,940	1,936	1,950
Processing	1,000 ac.	1,337	1,297	1,286	1,275
Potatoes	1,000 ac.	1,249	1,167	1,087	1,118
Dry beans	1,000 ac.	1,347	1,219	1,569	1,519
Other 2/	1,000 ac.	677	957	1,321	1,379
<i>Production</i>	Mil. cw t	1,295	1,355	1,300	1,301
<i>Vegetables:</i>					
Fresh & melons	Mil. cw t	469	485	473	479
Processing	Mil. cw t	314	356	317	326
Potatoes	Mil. cw t	458	456	422	427
Dry beans	Mil. cw t	22	18	27	23
Other 2/	Mil. cw t	32	41	44	46
<i>Crop value</i>	\$ mil.	15,524	15,533	15,862	16,656
<i>Vegetables:</i>					
Fresh & melons	\$ mil.	9,769	9,701	9,819	10,100
Processing	\$ mil.	1,367	1,473	1,323	1,525
Potatoes	\$ mil.	2,686	2,575	2,903	3,190
Dry beans	\$ mil.	423	453	526	500
Mushrooms	\$ mil.	890	919	909	881
Other 2/	\$ mil.	388	412	434	460
<i>Unit value 3/</i>	\$/cw t	11.99	11.46	12.20	12.80
<i>Vegetables:</i>					
Fresh & melons	\$/cw t	20.85	20.02	20.77	21.09
Processing	\$/cw t	4.36	4.14	4.17	4.69
Potatoes	\$/cw t	5.89	5.67	6.90	7.47
Dry beans	\$/cw t	18.40	25.70	18.40	21.46
Other 2/	\$/cw t	12.05	10.15	9.91	9.90
<i>Trade</i>					
<i>Imports</i>	\$ mil.	5,454	6,212	6,603	6,973
<i>Vegetables:</i>					
Fresh & melons	\$ mil.	3,028	3,458	3,668	3,950
Processing 4/	\$ mil.	1,276	1,448	1,587	1,630
Potatoes & products	\$ mil.	701	791	787	840
Dry beans	\$ mil.	49	65	82	65
Other 5/	\$ mil.	400	449	479	488
<i>Exports</i>	\$ mil.	3,320	3,479	3,855	4,118
<i>Vegetables:</i>					
Fresh & melons	\$ mil.	1,302	1,364	1,515	1,615
Processing 4/	\$ mil.	798	794	828	850
Potatoes & products	\$ mil.	653	745	841	925
Dry beans	\$ mil.	157	145	160	203
Other 5/	\$ mil.	410	432	511	525
<i>Per capita use</i>	Pounds	447	448	444	443
<i>Vegetables:</i>					
Fresh & melons	Pounds	172	175	174	175
Processing	Pounds	122	123	125	126
Potatoes & products	Pounds	138	135	129	126
Dry beans	Pounds	7	6	6	7
Other 2/	Pounds	9	9	9	9

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.

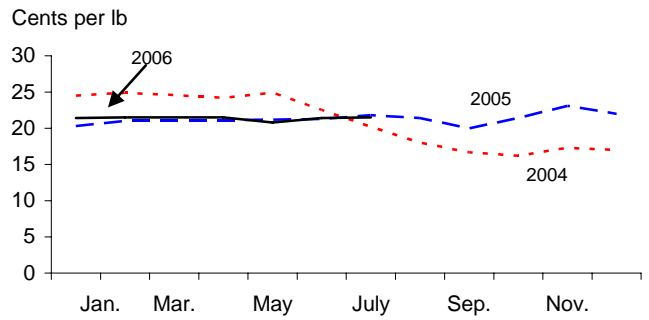
Sources: Derived by ERS from data of USDA, National Agricultural Statistics Service, *Crop Production, Acreage, Agricultural Prices, Crop Values, Mushrooms, and Potatoes*, and from U.S. trade data of the U.S. Dept. of Commerce, Bureau of the Census.

Figure 1
F.o.b. shipping-point prices for fresh-market vegetables

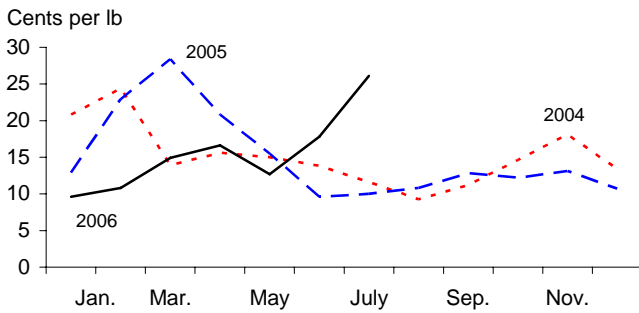
Broccoli



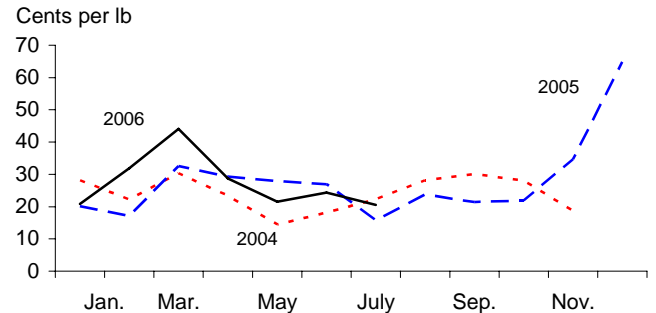
Carrots



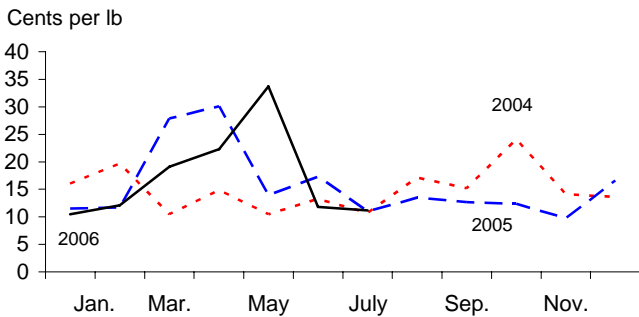
Celery



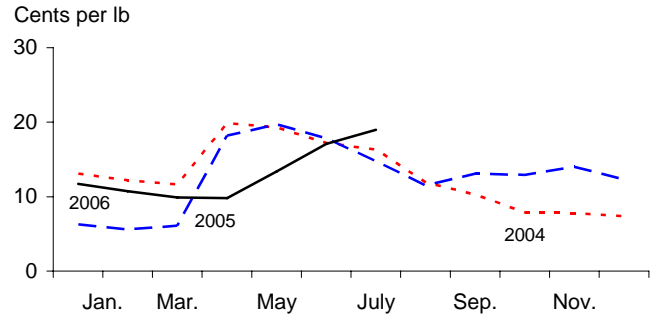
Cucumbers



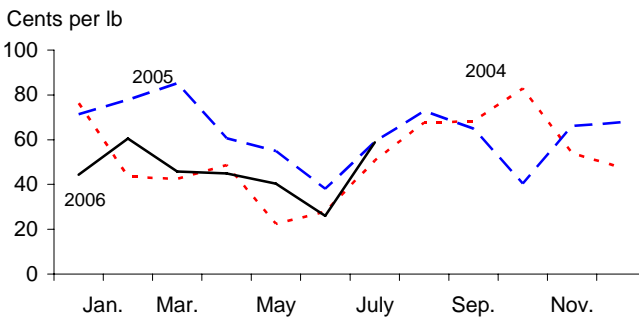
Head lettuce



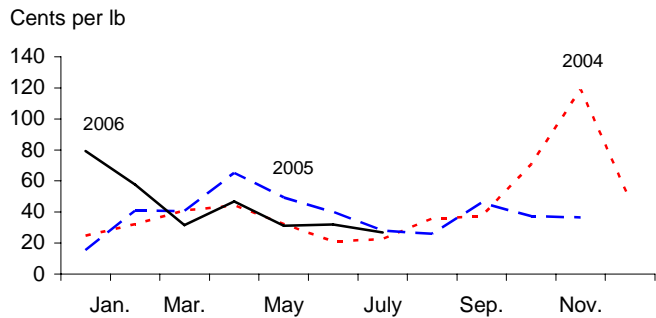
Onions



Snap beans



Tomatoes



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

Fresh-Market Vegetables

Summer Acreage About Steady

Area for harvest of the major fresh-market summer vegetables (excluding onions and potatoes) was forecast to rise less than 1 percent to 300,300 acres. This compares with a 1-percent increase last summer and follows a 1 percent increase in spring vegetable acreage this year. Seven of the eleven surveyed crops registered increased acreage, led by a 10-percent advance in snap beans and 9-percent more area devoted to cabbage. Although declines were noted for only four crops, two of them were head lettuce (down 7 percent) and tomatoes (down 3 percent)—the second and third largest in terms of summer acreage.

California, accounting for 46 percent of this year's summer-season vegetable area (about the same as a year earlier), reduced it's acreage 1 percent. New York, the second-leading summer-season producer, with 17 percent of fresh-market vegetable acreage, expects to harvest 4 percent more area than a year ago, largely because of strong increases in snap bean and cabbage area. Michigan, the third-leading summer fresh vegetable State in terms of area, expects to harvest 13 percent fewer acres this summer. Despite generally higher prices a year ago and favorable weather this spring, growers in Michigan reduced area for most fresh-market vegetables, including sweet corn.

Sweet corn remains one of the most widely produced vegetables in the United States, harvested at some point during the year in all 50 States. During the summer, the greatest acreage among fresh vegetables is devoted to sweet corn, which increased 1 percent to 109,700 acres this year. New York is expected to account for 24 percent of fresh sweet corn area this summer, followed by Pennsylvania (18 percent), Ohio (15 percent), California (9 percent), and North Carolina (7 percent). In a typical year, North Carolina begins the summer harvest in June (finishing in August), while New Jersey is among the last (finishing the summer harvest in mid-October). In early August, crop reporters rated the New York sweet corn crop as being 75 percent in good or excellent condition.

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

Item	2003	2004	2005	2006	Change
					2005-06
					Percent
					--Acres--
Snap beans	19,200	17,200	18,900	20,700	10
Broccoli	33,000	32,500	32,500	33,500	3
Cabbage	12,300	12,900	12,300	13,350	9
Carrots	19,200	18,900	18,700	19,700	5
Cauliflower	9,000	8,000	7,500	7,600	1
Celery	5,700	5,800	5,900	5,500	-7
Sweet corn	119,300	109,100	108,300	109,700	1
Cucumbers	4,400	4,600	5,100	4,200	-18
Head lettuce	50,800	46,200	46,900	43,800	-7
Bell pepper	3,600	3,500	3,200	3,400	6
Tomatoes	35,000	39,200	40,200	38,850	-3
Total	311,500	297,900	299,500	300,300	0

1/ Selected crops for harvest largely during July-September.

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

Table 3--Selected fresh-market vegetable shipments 1/

Item	Annual 2005	June 2006	July		Change previous: 3/	
			2005 2/	2006	Month	Year
		--1,000 cwt--			Percent	
Snap beans	2,596	275	105	120	-56	14
Broccoli	9,803	727	632	605	-17	-4
Cabbage	1,364	572	400	495	-13	24
Cantaloup	28,587	4,300	3,985	3,058	-29	-23
Carrots	11,085	766	659	653	-15	-1
Cauliflower	4,293	330	247	244	-26	-1
Celery	17,848	1,255	1,143	1,101	-12	-4
Chinese cabbage	1,197	61	82	66	8	-20
Sweet corn	9,972	2,312	397	405	-82	2
Cucumbers	14,100	931	782	735	-21	-6
Greens	2,437	64	56	49	-23	-13
Head lettuce	38,255	3,223	2,966	2,896	-10	-2
Romaine	14,510	1,087	1,010	970	-11	-4
Onions, dry bulb	50,296	3,484	3,533	3,169	-9	-10
Onions, green	3,540	251	201	167	-33	-17
Peppers, bell	16,577	1,324	841	797	-40	-5
Peppers, chile	4,009	281	220	337	20	53
Spinach	1,156	61	53	63	3	19
Squash	7,019	278	245	256	-8	4
Tomato, round	28,920	1,943	2,244	2,045	5	-9
Tomato, roma	11,098	657	725	620	-6	-14
Tomato, ghouse 4/	8,468	1,329	1,168	1,150	-13	-2
Tomato, cherry 5/	4,227	281	215	283	1	32
Watermelon	35,110	10,619	6,289	5,496	-48	-13
Selected total	326,467	36,411	28,198	25,780	-29	-9

1/ All monthly data are preliminary. They include domestic and imported product. 2/ For comparison, preliminary data are shown for July 2005. Final data can be found on the Market News Data Portal at <http://marketnews.usda.gov/portal/fv>. 3/ Change in July 2006. 4/ Includes all types of tomatoes produced under cover. 5/ Includes grape tomatoes.

Source: USDA, Agricultural Marketing Service, *Fresh Fruit and Vegetable Shipments*.

Shipments Down, Prices Up in July

During July, preliminary data indicated that shipments of fresh-market vegetables (excluding potatoes and melons) were down 9 percent from a year earlier, with total volume for most crops below year-earlier levels. This decline reflected gaps in supplies caused by the cool wet spring, plus the extreme heat in July and heavy rains in the East. Despite these weather extremes, during the first 7 months of 2006, the volume of fresh vegetable (excluding potatoes and melons) shipments managed to total just above that of a year earlier.

During the first 7 months of 2006, f.o.b. shipping-point prices for commercial vegetables averaged 2 percent above a year earlier. In July, fresh vegetable prices averaged 3 percent above the lows experienced a year earlier, reflecting reduced market volume of most crops. The unusually hot weather that gripped most of the country in late July may have impacted yields of California's cool-season crops such as celery and lettuce. The heat may have accelerated growth of some crops (e.g., melons and sweet corn) and temporarily prevented fruiting in others (e.g., tomatoes), which will likely cause supply gaps and price spikes this summer.

With higher energy costs and slightly higher shipping-point prices, consumer prices for fresh-market vegetables averaged 4 percent above a year earlier over the first 7 months of 2006. During July, the Consumer Price Index (CPI) for fresh-market

Table 4—U.S. quarterly f.o.b. shipping-point prices, 2005-06

Commodity	2005			2006				Change 2nd Q 1/ Percent
	Second	Third	Fourth	First	Second	Third*	Fourth*	
	-- Cents per pound --							
Asparagus	91.20	164.00	175.00	202.50	136.73	175.00	125.00	49.9
Broccoli	33.97	26.87	21.77	27.97	37.50	32.00	34.00	10.4
Cantaloup	18.45	9.97	13.27	--	23.80	14.00	19.00	29.0
Carrots	21.20	21.07	22.17	21.47	21.23	20.00	19.50	0.1
Cauliflower	34.83	28.53	29.70	31.23	33.13	29.00	36.00	-4.9
Celery	15.31	11.20	12.00	11.78	15.70	17.00	13.00	2.5
Sweet corn	20.73	22.40	28.00	35.07	22.13	22.00	25.00	6.8
Cucumbers	28.03	20.30	40.47	32.30	25.10	23.00	23.50	-10.5
Lettuce, head	20.43	12.40	12.94	13.90	22.60	17.00	19.00	10.6
Onions, dry bulb	17.40	12.53	12.47	10.76	13.44	14.00	11.50	-22.8
Snap beans	51.27	65.60	58.10	50.23	37.07	61.00	54.00	-27.7
Tomatoes, field	51.50	33.40	36.90	56.10	36.67	32.00	37.25	-28.8
All vegetables 2/	1023	817	897	892	1006	870	860	-1.7

-- = not available. * = ERS forecast. 1/ Change in 2nd-quarter 2006 over 2nd-quarter 2005.

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*.

vegetables averaged just 1 percent above a year earlier. Higher retail prices for potatoes and broccoli outweighed lower prices for tomatoes and lettuce in July.

High Yields Bring Record Large Spring Onion Crop

Harvested area for all onions is forecast at 166,550 acres in 2006—up 3 percent from 2005, but 5 percent below the record high set in 1999. For spring-season onions, with area and yield both higher, forecast production reached 13.6 million cwt—up 21 percent from a year earlier and well above the previous record set in 2004 (12.0 million cwt). With excellent growing weather and few disease problems, expected production in Texas jumped 29 percent from a year earlier to a record-high 6.0 million cwt. With estimated harvested area down 3 percent, all the gain in Texas was due to a 33-percent surge in yield per acre. The previous high yield for the Texas spring onion crop was 325 cwt in 2001—23 percent below the 2006 yield. Yields were also expected to set new highs in Georgia. However, with a slow start to the Vidalia onion harvest, a glut of onions in the market, and low prices, a portion of Georgia's crop was reportedly abandoned for economic reasons.

The U.S. summer nonstorage onion crop is forecast to decline 3 percent to 10.9 million cwt in 2006. Lower yields (down 8 percent) are expected to offset higher area harvested (up 6 percent). Smaller crops, caused largely by reduced yields in California and Nevada, will offset stronger output elsewhere. Excess rain earlier in the season and extreme summer heat are partly to blame for the expected 16-percent reduction in California's yields. In addition, fewer California onions were making grade, with above-normal packing losses reported.

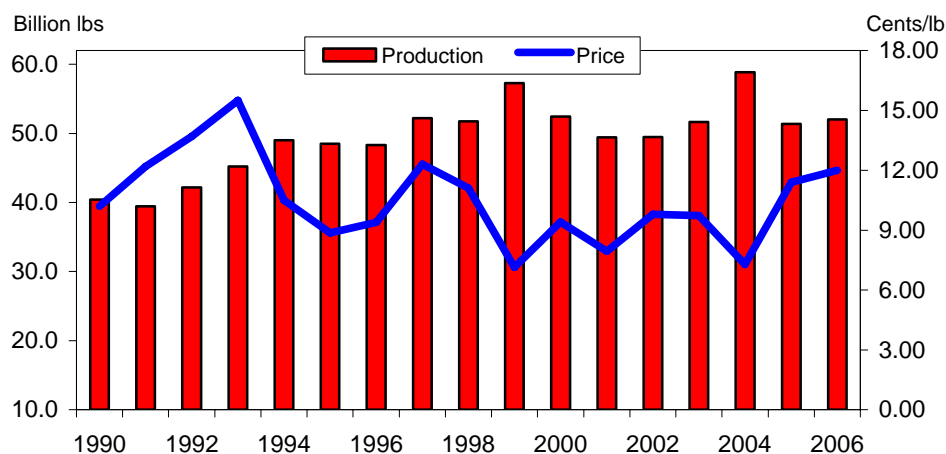
In the United States, the summer storage crop accounts for about 86 percent of all the fresh and processing onions produced. Reflecting improved prices for the 2005 crop, early forecasts suggest that storage-onion harvested area could rise 4 percent in 2006. Yields in 2005 were second only to the 2004 record high. However, given the extreme heat in many onion-growing areas this summer, it is unlikely that storage yields will approach the highs of the past 2 years. Supporting this are

reports from several areas indicating the size profile of the crop is running below a year earlier, with more medium- and small-sized onions and fewer of the high value larger sizes in demand by many foodservice buyers.

Fresh dry bulb onion shipping-point prices continued to recover strongly from the lows this spring as a result of record yields. Preliminary f.o.b. shipping-point prices for onions in July averaged one-third above a year earlier and were the strongest for that month since 1998. This contrasts with spring-season onion prices, which were the lowest since the spring of 2000. During the spring quarter (Apr.-June) of 2006, shipping-point prices averaged \$13.44 per cwt—down 23 percent from a year earlier and 33 percent below average spring prices recorded during 2002-2004.

Figure 2

U.S. storage onions: Production and season-average price



Source: USDA, National Agricultural Statistics Service, *Vegetables*, except 2006 by ERS.

Table 5--Selected fresh-market vegetable trade volume, 2004-06 1/

Item	2005 Annual	January - June			Change 2005-06 Percent
		2004	2005	2006	
--1,000 cwt--					
Exports, fresh:					
Onions, dry bulb	6,678	2,507	3,178	2,649	-17
Lettuce, head	4,501	2,430	2,364	2,087	-12
Lettuce, other	4,863	2,467	2,638	2,534	-4
Broccoli	3,147	1,930	1,593	1,755	10
Tomatoes	3,265	1,610	1,564	1,493	-5
Other	16,851	10,007	9,808	9,337	-5
Total	39,306	20,952	21,145	19,855	-6
Imports, fresh:					
Tomatoes, all	20,981	13,079	12,396	14,322	16
Cucumbers	9,551	5,487	6,139	5,818	-5
Onions, dry bulb	6,592	3,702	3,521	3,226	-8
Peppers, sweet	6,526	3,605	3,908	4,730	21
Peppers, chile	4,254	1,869	1,935	2,454	27
Squash 2/	5,244	2,964	3,135	3,154	1
Other	23,149	10,409	11,711	12,236	4
Total	76,297	41,114	42,747	45,940	7

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, Bureau of the Census.

Melons

Summer Acreage Down

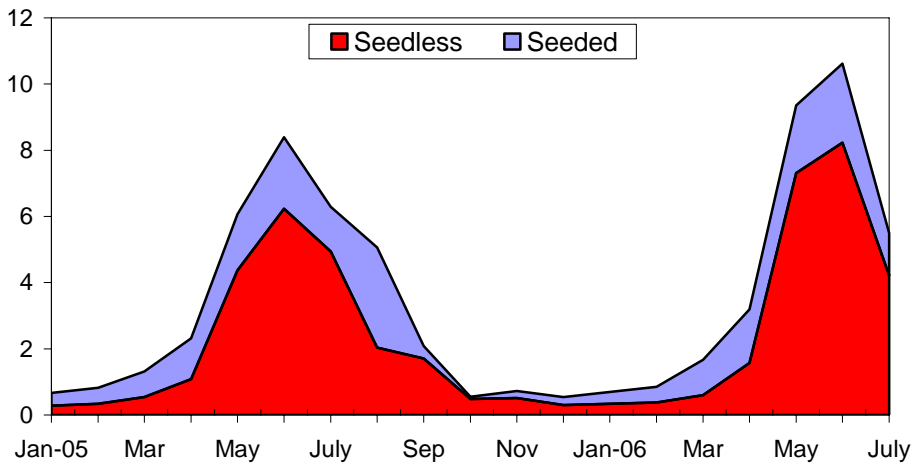
Although vegetable area is up slightly this summer, area for harvest of the three leading melon crops (watermelon, cantaloup, and honeydew) is expected to drop 3 percent to 108,200 acres. Increased honeydew area (up 4 percent) is expected to be outweighed by lower area for both watermelon and cantaloup. Georgia, which accounts for more than one-third of summer watermelon acreage, expects to harvest 9 percent fewer acres in 2006, due in part to dry conditions earlier in the season. Georgia was the only State to indicate lower area for watermelon this summer. Watermelon accounts for more than three-fourths of the State's summer vegetable and melon area.

According to USDA's Market News Service, total melon shipments ran 12 percent above a year earlier during the peak May-July period as greater watermelon volume outweighed reductions in movement of other melons. Although total watermelon acreage is expected to be lower this summer, shipment volume has been strong to date. During the peak May-July shipping period, volume averaged more than a tenth above a year earlier. This suggests favorable yields and/or high packout rates,

Figure 3

U.S. watermelon: Monthly shipments, seedless and seeded, 2005-06

Million cwt



Source: USDA, Agricultural Marketing Service, *Fresh Fruit and Vegetable Shipments*.

Table 6--Summer-season fresh-market melon area 1/

Item	2003	2004	2005	2006	Change
					2005-06
					Percent
--Acres--					
Cantaloup	42,400	40,300	41,200	38,600	-6
Honeydew	14,100	14,000	14,000	14,600	4
Watermelon	62,700	55,700	55,900	55,000	-2
Total	119,200	110,000	111,100	108,200	-3

1/ Selected crops for harvest largely during July-September.

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

which is sometimes an indicator of good quality. The seedless watermelon category continues to expand its dominance, with seedless accounting for 77 percent of all domestically grown watermelon during May-July of 2006 (figure 3). During this same period, shipments of seedless watermelon were up 27 percent from a year earlier, while movement of seeded melons was up 10 percent as the category continues to lose ground to seedless.

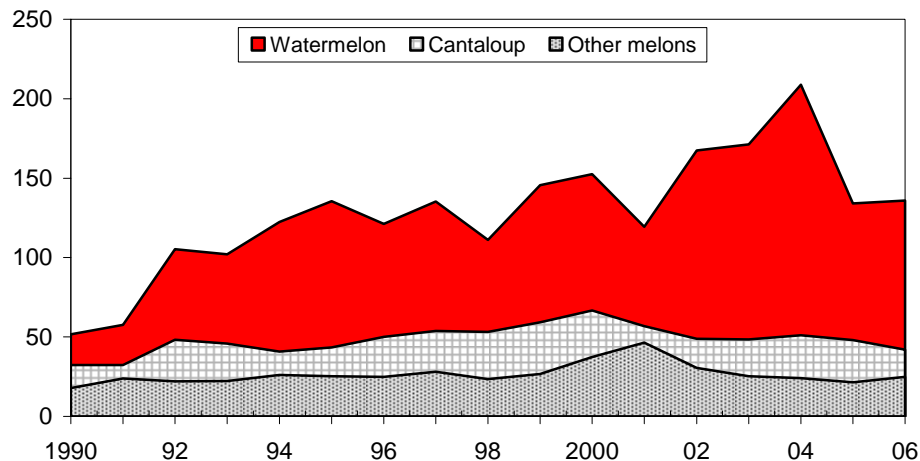
Shipments of all watermelon were running ahead of a year earlier in several States, including Arizona, Georgia, and Texas, but were lower (largely because cool spring weather delayed the start of the season) in places such as California, Delaware, and Oklahoma. Consistent with lower acreage, cantaloup shipments were down 6 percent during the May-July period. However, despite larger acreage, movement of honeydew melon was down 4 percent from a year earlier. California and Arizona each reported reduced market volume compared with last season.

During May-July of 2006, the producer price index for all melons averaged 11 percent below a year earlier. Prices were lower than a year earlier for both watermelon (down 19 percent) and cantaloup (down 6 percent), but averaged about one-fourth higher for honeydew melons.

Figure 4

U.S. melons: Export volume, January-June, 1990-2006

Million lbs



Source: Prepared by ERS using data from the USDC, Bureau of the Census.

Table 7--U.S. fresh-market melons: Trade volume, January - June

Item	Annual	January - June		Change	
	2005	2004	2005	2005-06	
		--1,000 cwt--		Percent	
<i>Exports:</i>					
Watermelon	3,499	2,089	1,341	1,358	1
Cantaloups	1,622	510	480	420	-13
Honeydew & other	1,037	241	214	249	16
Total	6,158	2,839	2,035	2,027	0
<i>Imports:</i>					
Cantaloups	9,520	7,825	8,107	8,039	-1
Watermelon, all	6,598	4,337	5,522	6,646	20
Seedless	4,884	2,996	3,960	5,681	43
Honeydew & other	3,993	2,875	2,890	3,213	11
Total	20,110	15,037	16,518	17,898	8

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

Processing Vegetables

Processors of the five major vegetables (tomatoes, sweet corn, snap beans, green peas, and cucumbers for pickles) have contracted 1.21 million acres in 2006—down 1 percent from acreage in the comparable producing States of a year earlier. Contract production accounted for 97 percent of the output of the five leading processing vegetables last year. Canneries, which account for two-thirds of all processing vegetable area, have contracted for 3 percent fewer acres than a year ago. Due to periods of extreme heat this summer, yields are expected to be below the average of the past 3 years for most crops. However, larger area for green peas and tomatoes is expected to outweigh reductions in yields and leave total production of the five leading canning vegetables around the average of the previous 3 years and up from the 13.2 million short tons of 2005.

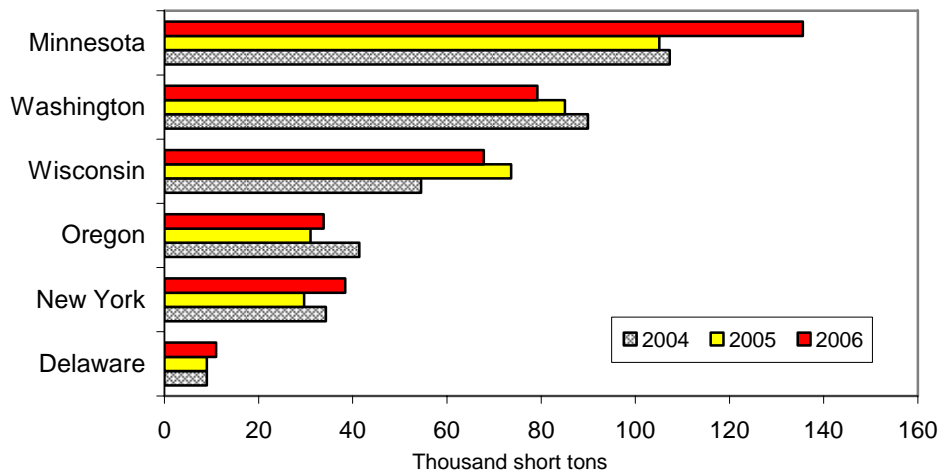
For processors of frozen vegetables, contract area is forecast to rise 4 percent from year-earlier levels as lower green pea plantings are outweighed by gains in sweet corn and snap bean acreage. Assuming yields run just below the average of the past 3 years, contract production for the three leading vegetables for freezing is expected to total around the average of the previous 3 years (2.06 million tons). Reduced output for green peas is expected to be outweighed by small increases for sweet corn and snap beans. This would place output of the three selected freezing crops up 4 to 8 percent from the 1.9 million short tons of a year earlier.

Green Pea Crop Up

The first estimate of 2006 contract production for processing green peas indicated a 10-percent increase from a year earlier to 416,890 short tons. Estimated area for harvest was up 1 percent from a year earlier. Per acre yields are also expected to rise 9 percent to 1.96 tons after declining each of the past 2 years (yields in 2003 were record-high). Output in Minnesota (the top producing State) rose 29 percent, while New York was up 30 percent. These gains were expected to outweigh reductions in Wisconsin (down 8 percent) and Washington (down 7 percent). Some heat-related reduction in late season yields may trim these forecasts when the next estimates are released in the September 7 *Vegetables* report.

Figure 5

U.S. processing green peas: Contract production, 2004-06 1/



1/ 2006 data are NASS forecasts.

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

Wholesale prices for retail-size packs (24/300) of canned peas over the first 6 months of 2006 averaged just above those of a year ago. During the same period, wholesale prices for retail frozen green peas also averaged about 2 percent above those of a year earlier. On a fresh equivalent (shelled) basis, domestic disappearance of green peas for canning totaled about 308 million pounds in 2005. This was down 18 percent from the average of the first 5 years of the 2000s and 29 percent below average disappearance during the 1990s. With larger supplies and lower prices in the coming year, canning disappearance is expected to move back to near the 2004 level (360 million pounds).

Tomato Crop Feeling the Heat

Cool, wet weather that delayed planting by several weeks, and now an extended bout of extreme summer heat, may eat into earlier projections of a sizeable gain in the processing tomato crop. U.S. tomato processors had been expecting to utilize at least 11.9 million tons of tomatoes to produce products such as paste, sauce, catsup, and juice. The industry currently expects production to total less than 11 million tons. The excess heat during July may reduce yields for a portion of the crop, since tomatoes may fail to set fruit (or set poorly) when temperatures are above the mid-90s. The heat also caused fruit to ripen more quickly, as illustrated by the tonnage delivered to processors for the last 2 weeks of July that ran above projected volume. According to the California League of Food Processors, June 1 stocks of processed tomatoes (on a fresh-equivalent basis) were down 30 percent from the previous year. This left apparent disappearance during the pack year (June 1-May 31) down 4 percent from the previous season. Apparent monthly disappearance of domestically produced processing tomatoes averaged 949,321 tons in 2005/06.

Sweet Corn

Contract area for sweet corn, the second-largest processing vegetable in terms of production (excluding potatoes) after tomatoes, is expected to decline 5 percent in 2006, with canning area down 15 percent and freezing area up 9 percent. Assuming dry soils in a few areas of the upper Midwest are relieved and yields come in near

Table 8--Processing vegetables: Consumer and producer price indexes

Item	2005		2006		Change previous:	
	July	June	June	July	Month	Year
	-- Index --			-- Percent --		
Consumer Price Indexes (12/97=100)						
Processed fruits and vegetables	121.3	122.8	123.8		-0.8	2.1
Canned vegetables	125.6	126.5	128.1		-1.2	2.0
Frozen vegetables (1982-84=100)	180.2	175.7	178.8		-1.7	-0.8
Dry beans, peas, lentils	118.3	119.3	120.7		-1.2	2.0
Olives, pickles, relishes	100.4	110.9	110.3		0.5	9.9
Producer Price Indexes (1982=100)						
Canned vegetables and juices	137.7	141.0	140.2		0.6	1.8
Pickles and products	185.4	189.1	189.1		0.0	2.0
Tomato catsup and sauces 1/	129.9	135.2	133.8		1.0	3.0
Canned dry beans	131.4	136.8	134.7		1.6	2.5
Vegetable juices 1/	113.5	116.2	116.2		0.0	2.4
Frozen vegetables	137.2	139.4	139.2		0.1	1.5
Frozen vegetable combinations	105.0	105.9	107.1		-1.1	2.0
Dried/dehyd. fruit & vegetables	145.3	171.0	171.2		-0.1	17.8

1/ Index base year is 1987.

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

the average of the previous 3 years, processing sweet corn production could decline 4 to 8 percent in 2006. In early August, the crop was 1 to 2 weeks ahead of schedule in Minnesota, the top producing State. In 2005, the situation was reversed, with processing sweet corn production rising 7 percent (to 3.17 million short tons) as output of canning corn jumped 17 percent and corn for freezing fell 3 percent.

Assuming average acreage losses and yields hovering near the mean of the previous three seasons, total production of the 11 selected processing vegetables could rise 3 to 5 percent from the 15.8 million short tons harvested in 2005. Average retail prices for all processed fruits and vegetables increased just over 3 percent during the first 6 months of 2006, largely reflecting increased prices for canned vegetables (such as tomato products) as well as generally higher packaging, transportation, and marketing costs.

Processed Exports Up

During the first half of 2006, the value of processed vegetable exports (excluding potatoes, mushrooms, and pulses) increased 5 percent to \$421 million. Canada (38 percent of value), Japan (15 percent), and Mexico (9 percent) remained the top foreign markets for processed vegetables through the first half of 2006.

Led by tomato products, the value of canned vegetable exports increased 3 percent. Increased shipments to Canada (up 5 percent), Mexico (up 13 percent) and South Korea (up 4 percent) outweighed a reduction in the value of canned exports to Japan (down 21 percent). U.S. canned exports to Japan are largely concentrated in sweet corn and tomato products (e.g., catsup, sauces, and paste). Exports to Japan for both of these product/product groups declined during the first half of 2006, with the value of sweet corn exports down 27 percent and tomato products down 11 percent. The export price (unit value) of sweet corn was up 1 percent from a year earlier to 41.2 cents per pound, but was 6 percent above the average of the previous 3 years.

Excluding potatoes, U.S. exports of frozen vegetables were up 15 percent during January-June as shipments of green peas (up 16 percent) and sweet corn (13 percent) each increased. Japan (30 percent of export value), Canada (30 percent), and China (9 percent) were the top three markets. Exports of sweet corn to China were up 32 percent, accounting for most frozen vegetables to China (excluding potatoes).

Table 9--Value of processed vegetable trade 1/

Item	2005 Annual	January - June			Change 2005-06 Percent
		2004	2005	2006	
--Million dollars--					
Imports:					
Canned	803	342	381	407	7
Frozen	493	237	251	266	6
Dehydrated 2/	291	128	145	170	17
Exports:					
Canned	539	261	264	272	3
Frozen	161	74	75	87	15
Dehydrated 2/	128	56	60	63	3

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

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

Potatoes

Sales of 2005 Crop Projected Up 13 Percent

Based on the estimated value of potato production in 2005, the sales value of the 2005 crop will be around \$2.6 billion, up from \$2.3 billion in 2004. (Actual sales will be reported in the *Potatoes 2005 Summary*, released September 21, 2006). The 2005 fall crop is expected to generate sales of \$2.2 billion, and average sales per acre are estimated to be \$2,275 or 24 percent higher than in 2004.

A 38-percent jump in fresh-market sales to \$1.2 billion is anticipated based on higher prices in the 2005-06 marketing year. For processing potatoes, reduced output in 2005/06 more than offset higher prices, resulting in a projected 5-percent decline from a year earlier in sales value to \$1.25 billion. Including additional sales of \$27 million for potatoes used for seed and feed, overall sales of the 2005 crop will increase by \$296 million—13 percent above the 2004 crop.

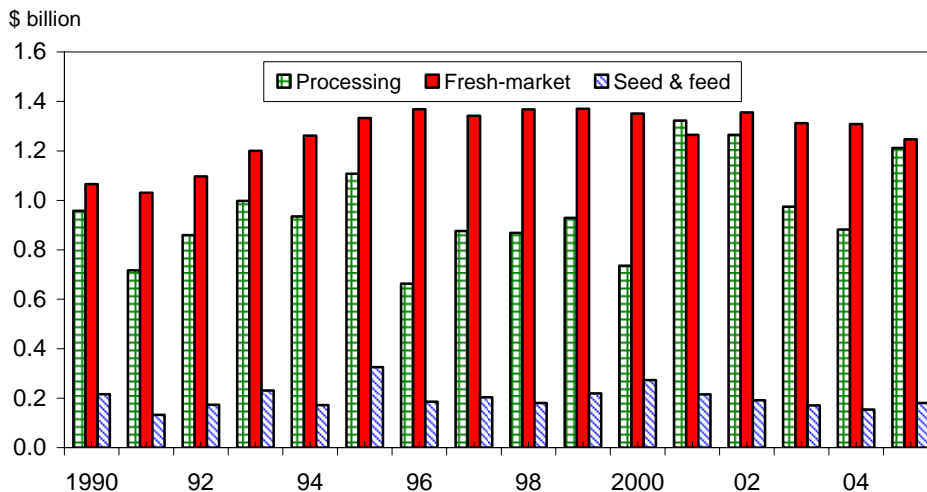
The value of U.S. potato production in 2005 was \$2.9 billion, up 13 percent from 2004. The 2005 fall crop jumped 15 percent in value and the summer crop surged 23 percent. Among the major producers, the biggest gainers were Colorado, Washington, and Idaho. The fall crop gained \$314 million in value, of which \$255 million was accounted for by Western States. In production value per acre, Texas ranked first with \$7,341, followed by Florida (\$6,884), and California (\$5,500). The gain in value over 2004 was \$4,225 per acre in Texas, \$1,743 in Colorado, and \$1,023 in New York. The 2005 fall crop averaged \$488 more per acre in production value than a year earlier and the summer crop was up \$801 per acre. The Western States garnered an additional \$569 per acre on average for fall 2005 potatoes.

Harvest Area Up 3 Percent in 2006, Yields Expected Lower

It is uncertain whether the projected increase in area harvested for the 2006 potato crop will push up production as well. Because of periods of extreme summer heat

Figure 6

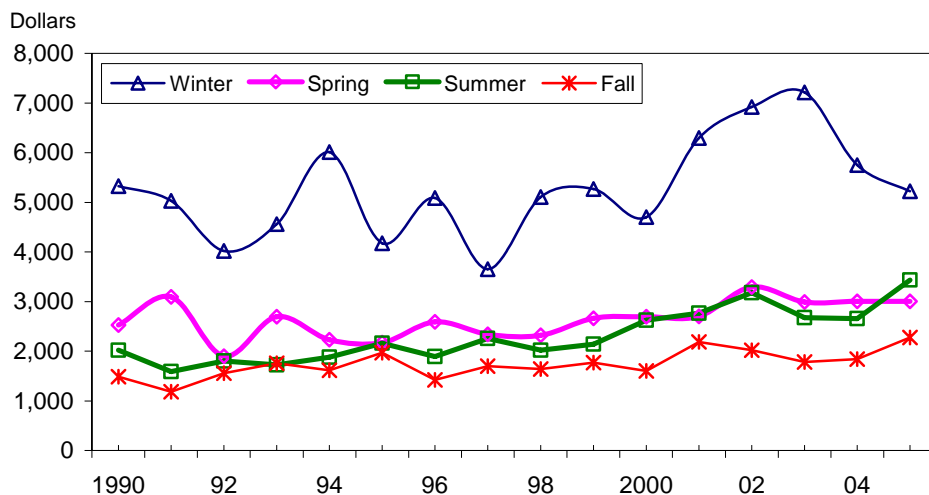
U.S. potatoes: Sales value, 1990-2005



Source: USDA, NASS, *Potatoes Summary* except 2005 forecast by ERS.

Figure 7

U.S. potatoes: Sales value per acre, 1990-2005



Source: Computed by ERS from data of USDA, NASS, *Potatoes Annual Summary, Crop Values*.

and patchy rain, declining fall crop per acre yields could offset expected larger harvested area, leaving production near year-earlier levels. Yield is expected to be closer to 390 hundredweight (cwt) per acre than to the 401 cwt seen in 2004 and 2005. The yield that corresponds to the inflection point is 391 cwt per acre. At this yield, the fall 2006 crop will be unchanged from 2005, but any yield above 391 cwt pushes fall production higher.

Assuming fall yields average 391 cwt per acre, the average yield for all seasons in 2006 would be 380 cwt per acre. Given this yield, the corresponding production level would be 425 million cwt, or 1 percent higher than in 2005. For each cwt above 391 cwt per acre, production rises by about 1 million cwt. Thus, if the fall 2006 yield were closer to 395 cwt per acre, total U.S. potato production would be about 429 million cwt—2 percent (6.7 million cwt) above a year earlier. This amount likely represents the upper limit of the range of production possibilities (and of yield) for the 2006 crop, based on weather conditions to date.

Prices May Weaken but Remain High Relative to Last Fall

Potato prices from January to July 2006 were 27 percent higher than during the same period last year. Fresh-market prices were 46 percent more on average than in 2005. However, prices of processing potatoes were up only 10 percent through July of this year. Potato prices are expected to flatten or seasonally decline this fall as the new crop is harvested and marketed. Although prices will be down from the highs of the previous several months, they may remain above those of last fall. Year-to-date average prices of fresh-market potatoes in Idaho were 130 percent higher than in 2005; in Colorado, fresh-market prices were 116 percent greater; and in North Dakota 115 percent higher.

Prices were up due to lower domestic shipments and stronger apparent demand for potatoes. Even demand from foreign markets has been strong, based on higher export values and volumes to this point in 2006. Annualized domestic shipments of tablestock potatoes were running 5 percent below last year's pace, and shipments of chipper potatoes lagged by 23 percent. Overall shipments to U.S. destinations in

Table 10--U.S. potatoes: Processing use in 9 major States 1/

Season	Thru	Potatoes processed in:							Season
	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Other	total
-- Million cwt --									
1995-96	71.4	16.3	16.3	17.7	18.1	16.9	---	---	198.8
1996-97	78.2	15.7	16.6	20.2	18.9	18.7	---	---	227.5
1997-98	68.4	15.3	15.5	19.4	19.7	17.6	---	---	212.1
1998-99	74.1	15.9	18.9	19.5	21.1	18.7	18.8	35.6	222.5
1999-00	75.0	15.8	15.8	19.9	20.5	18.1	19.4	30.0	214.5
2000-01	78.6	16.8	17.9	18.4	19.8	18.7	20.3	40.2	230.6
2001-02	65.4	15.8	15.1	18.3	17.0	16.5	18.5	28.9	195.5
2002-03	77.0	15.6	14.9	18.7	18.1	16.5	18.6	31.7	211.0
2003-04	72.4	15.4	14.3	18.8	17.1	16.7	19.6	32.4	206.8
2004-05	70.7	15.2	15.0	18.4	16.6	17.8	19.2	38.0	211.0
2005-06	66.0	15.7	14.8	18.8	18.0	15.9	17.9	36.8	203.9
% change	-6.6	2.9	-1.4	2.2	8.6	-10.7	-6.8	-3.4	-3.4

--- = not available.

1/ Excludes potatoes used for chips in Maine, Michigan, and Wisconsin.

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

2006 are projected to be 8 to 10 percent lower than last year, based on January to July movement of tablestock, chipper, and seed potatoes.

Year-to-date U.S. producer (wholesale) prices for frozen french fries were relatively unchanged from 2005. Although prices of potatoes for processing are up 10 percent to date, import prices for frozen fries are up only 1 percent. Prices of potato chips, however, have risen 5 percent to date, partly reflecting a 5-percent hike in corresponding import prices.

Stocks of frozen potatoes through June 2006 were 3 percent lower than last year. Stocks in the Mountain region, which includes Idaho and Colorado, were down 5 percent. Total stocks in cold storage were 1.1 billion pounds in June 2006, representing only 93 percent of June 2005 stocks of 1.2 billion pounds.

On a fresh-equivalent basis, per capita disappearance of potatoes for processing is generally about twice that for fresh-market uses. However, in value terms, per capita disappearance (estimated as domestic sales minus net potato exports) of potatoes for fresh and processing purposes was approximately equal in 2005 at \$4 and \$4.10, respectively.

Exports Outpace Imports to Date

The value of U.S. potato exports to major markets were up by double-digit rates thus far in 2006. Total exports to Mexico were up 27 percent, due largely to more shipments of potato chips and frozen fries. Exports to Japan were 14 percent higher to date than in 2005, with shipments of frozen fries up 11 percent and potato chips up 17 percent. Exports to Canada gained 15 percent thus far in 2006 with shipments of fresh-market and seed potatoes up 55 percent and frozen fries up 15 percent.

Through May 2006, U.S. exports were 10 percent higher in value than in 2005. Fresh and chilled potatoes were 57 percent higher in export value and exports of frozen fries were up 12 percent. U.S. export volume was only 8 percent higher

through May. Thus, export unit values were up 2 percent on average from 2005. Close to half of U.S. exports (in value) were frozen fries, with 17 percent each for fresh potatoes and potato chips.

U.S. imports of potatoes in 2006 were 7 percent higher than in 2005, even as imported potato chips and starch have dropped in value. The larger gain in exports relative to imports is anticipated to push the \$54 million trade surplus of 2005 to around \$85 million in 2006 if the year-to-date net export pace is maintained through December. However, the U.S. potato trade deficit with Canada, the largest import source, is projected to widen to over \$500 million in 2006 from \$467 million in 2005, despite the stronger Canadian dollar. This is attributed to a projected 10-percent increase in U.S. potato import value from Canada in 2006, two-thirds of which is frozen fries. This is another indicator of strong U.S. demand for potatoes as domestic supply remains tight.

Among U.S. potato exports, potato chips and flakes/granules have the highest price (unit value) gains to date in 2006. After potato chips, flakes and granules are posting the highest export unit values at more than 50 cents per pound, up 18 percent from 2005. Of U.S. potato imports in 2006, fresh or chilled potatoes have posted the biggest increases thus far in value and prices, which were boosted by a decline in import volume. Overall, U.S. terms of trade in potatoes (measured as export prices divided by import prices) have deteriorated 3 percent in 2006 despite greater terms of trade with respect to potato chips and flakes/granules. Nevertheless, U.S. potato export prices (per pound) are still 30 percent higher on average than import prices.

Among U.S. imports of major potato products, only potato chips have terms of trade under 100—that is, import prices exceed export prices, which has mostly been the case historically. The two sources of imported potato chips are Mexico and Canada, with Mexico supplying twice the volume of Canada. Mexico did not even export potato chips until 2002, although the U.S. has long supplied that country with potato chips.

Table 11--U.S. potatoes: Exports to top three markets, 2003-06

Destination	January - December				Change
	2003	2004	2005	2006 f	2004-05
	-- Million dollars --				Percent
Japan	178.3	203.5	226.9	259.3	14.3
Canada	171.6	169.2	181.0	207.7	14.8
Mexico	85.9	107.5	149.9	190.3	27.0
Others	217.4	264.6	283.4	268.3	-5.3
World	653.2	744.8	841.2	925.6	10.0

f = ERS forecast.

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

Dry Beans

Production Expected to Be Down 15 Percent

The first estimate of 2006 U.S. dry edible bean production indicated a reduction of 15 percent, to 23.3 million cwt (table 12). Harvested area and per acre yields are both expected to decline. U.S. dry bean growers ultimately reduced planted area 3 percent due to lackluster dry bean prices relative to other crops. As a result, estimated area available for harvest is forecast to decline 3 percent to 1.52 million acres. In 10 of the 18 surveyed States (including Idaho and Washington, where chickpea area is up), harvested area was expected to be down. North Dakota, which accounts for 40 percent of U.S. dry bean seeded area, expects to harvest a 6 percent larger area in 2006, with increases in navy, black, pink, and other bean types outweighing declining pinto bean acreage.

Due largely to lower yields, production is expected to decline in 11 of the 18 States included in the USDA dry bean survey. The largest reductions are expected in important producing States such as Colorado, North Dakota, Nebraska, and Minnesota. Growers in Michigan, the second-leading producer, anticipate above-average yields as weather conditions have remained favorable since the start of the season. The same is true in Colorado and New York, where yields may be the second-highest on record, and in Texas where yields could reach a new record high. However, dry bean yields in North Dakota may be the second lowest in the past 13 years due to excessive heat and dry soils this summer.

As indicated by the planted area estimates released in August (table 13) and yield patterns in major States, with the exception of garbanzo and black beans, production may decline for most major bean classes. Lower output is expected for pinto, Great Northern, and red kidney beans—which account for nearly three-fourths of the U.S. dry bean crop. USDA will release the first official estimate of production by class in the December 11 *Crop Production* report.

Crop Developments

The August forecast indicates that national dry bean yields, which have been trending higher by about 11 pounds annually, are expected to be more than 150 pounds below their 35-year trend (1970-2005). As of mid-August, about half of U.S. dry bean acreage was rated in good to excellent condition, down from 65 percent a year ago. This year, about one-third of the crop was rated in fair condition,

Table 12--U.S. dry beans: Production, 2003-2006

Item	2003	2004	2005	2006 p	Percent change
	--1,000 cwt--				Percent
North Dakota	7,800	4,750	8,588	6,300	-26.6
Nebraska	3,151	2,376	3,870	2,925	-24.4
Colorado	1,168	1,039	1,898	1,330	-29.9
California	1,380	1,152	1,385	1,248	-9.9
Minnesota	1,870	1,150	2,430	1,885	-22.4
Idaho	1,497	1,638	1,862	1,854	-0.4
Michigan	2,475	3,145	3,910	3,960	1.3
Washington	525	609	792	1,292	63.1
Wyoming	645	541	776	594	-23.5
Others	1,981	1,388	1,839	1,913	4.0
United States	22,492	17,788	27,350	23,301	-14.8

p = NASS preliminary August estimate.

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

Table 13--U.S. dry beans: Area planted by class, 2003-2006

Item	2003	2004	2005	2006 p	Percent change
	--1,000 acres --				Percent
Pinto	663.9	650.9	815.8	670.4	-17.8
Navy	158.2	185.1	233.4	276.4	18.4
Black	84.3	138.3	111.6	166.8	49.5
Large chickpeas 1/	37.5	39.0	79.3	125.6	58.4
Light red kidney	67.1	55.7	71.4	47.0	-34.2
Great Northern	109.4	51.1	72.8	70.7	-2.9
Dark red kidney	49.9	51.3	60.7	48.5	-20.1
Small red	33.2	33.2	50.9	35.0	-31.2
Pink	32.8	29.3	37.9	43.9	15.8
Blackeye	50.5	28.0	23.0	26.1	13.5
Baby lima	14.5	11.3	16.7	13.5	-19.2
Large lima	19.6	15.1	15.1	12.9	-14.6
Cranberry	15.4	13.4	12.4	9.8	-21.0
Others	69.8	52.6	64.0	60.7	-5.2
United States	1,406.1	1,354.3	1,665.0	1,607.3	-3.5

p = NASS preliminary August estimate. 1/ Excludes small chickpeas.

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

and nearly one-fifth was rated less than fair. In North Dakota, where the crop is ahead of schedule, yields have been affected by dry soils (both topsoil and subsoil moisture is predominantly short or very short), with more than one-quarter of the acreage in poor or very poor condition. With dry soils and less than 3 percent of the State's dry bean crop under irrigation, the first estimate of dry bean yields in North Dakota indicated a 31-percent decline from a year earlier. Soil moisture conditions are similar in Minnesota, with one-third of the crop in poor or very poor condition and yields projected to decline 21 percent from last year's record high. In Michigan, conditions have been favorable, soil moisture is largely in the adequate range, and the dry bean crop is ahead of schedule, with yields expected to be up 6 percent.

Prices Low in 2005/06, But Improvement Expected

During the first 11 months of 2005/06, grower prices across all classes of dry beans averaged \$18.57—31 percent below a year ago. With the exception of California, grower prices averaged less than a year earlier in every major dry bean State. In North Dakota, the all-class dry bean price reached a seasonal low in May (\$14.00/cwt) but has begun to move higher (\$14.90/cwt in July) in anticipation of the new smaller crop. During September-July of 2005/06, grower prices in North Dakota averaged 39 percent below a year earlier, with a recovery in dry bean prices expected over the coming season. The extent of this recovery will depend in large part on final yields, domestic demand, and commercial export and international food aid demand. As usual, the price outlook varies by class, with higher prices likely for such types as pinto and red kidney beans and lower prices likely for black, blackeye, and garbanzo beans. On average, higher prices for some of the major bean classes will help aggregate dry bean prices strengthen into mid-2007, with the season-average price across all bean classes expected to exceed \$21 per cwt.

During the second quarter of 2006, the Producer Price Index for canned dry beans averaged 5 percent above a year earlier. During the same period, the retail price for dry packaged beans averaged about 2 percent above a year earlier and 4 percent above the first quarter of 2006. In July, consumers paid an average of 83 cents per pound for packaged dry beans, down 1 percent from June, but up 4 percent from a year ago and 7 percent above 2 years ago.

Table 14--U.S. dry beans: Monthly grower prices for selected classes, 2005-2006 1/

Commodity	2005		2006		Chg. prev. year:	
	July	August	July	August 2/	July	August
	--- Cents per pound ---				--- Percent ---	
All dry beans	25.40	21.40	19.50	--	-23.2	--
Pinto (ND/MN)	22.00	17.70	14.25	16.50	-35.2	-6.8
Navy (pea bean) (MI)	21.00	20.00	19.50	19.50	-7.1	-2.5
Great Northern (NE/WY)	16.50	16.50	18.00	18.00	9.1	9.1
Black (MI)	18.50	18.80	22.00	22.00	18.9	17.0
Light red kidney (MI)	27.00	26.00	20.50	--	-24.1	--
Dark red kidney (MN/WI)	--	26.00	20.50	21.00	--	--
Baby lima (CA)	40.00	39.95	--	--	--	--
Large lima (CA)	42.00	42.30	49.67	--	18.3	--
Blackeye (CA)	31.38	31.70	--	--	--	--
Small red (ID)	22.00	22.40	19.50	19.00	-11.4	-15.2
Pink (ID)	22.00	22.40	19.50	19.00	-11.4	-15.2
Garbanzo (ID)	25.00	26.50	--	24.00	--	-9.4

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

Source: USDA, AMS, *Bean Market News*, except "all dry beans" from USDA, NASS, *Agricultural Prices*.

Table 15--U.S. dry beans: Crop year export volume to date

Item	Crop year 2004/05	September - June		Change 2004-05	
		2003/04	2004/05		2005/06
		-- 1,000 cwt --		Percent	
Pinto	1,234	1,859	960	2,207	130
Navy	1,005	1,004	890	981	10
Black	617	695	480	624	30
Great Northern	370	393	344	465	35
Light red kidney	56	52	48	132	175
Dark red kidney	166	160	140	234	67
Small red	137	210	114	157	38
Garbanzo	227	124	194	358	84
Baby lima	132	163	124	225	82
Large lima	128	81	122	127	4
Blackeyes	56	19	51	30	-41
Cranberry	45	87	37	72	93
Other	576	491	449	743	66
Total	4,749	5,338	3,953	6,356	61

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

Export Volume Up 61 Percent

Given lower dry bean prices, a weaker U.S. dollar, and continued food aid demand through the first 10 months of 2005/06 (September-June), the volume of dry bean exports rose 61 percent from a year ago. Improved stocks and lower U.S. prices increased trade in such crops as pinto beans, black beans, red kidney beans, and navy beans. Among the major export markets, sales improved to Canada (up 112 percent), Mexico (up 150 percent), and Japan (up 39 percent). The volume shipped to the United Kingdom increased 16 percent, led by navy and large lima beans. In calendar 2005, the United States exported about 16 percent of its dry bean supplies (production, stocks, and imports), compared with 18 percent a year earlier and the lowest since 1992. During the first 7 months of 2006, with increased supplies and lower prices stemming from last year's larger crop, export movement was strong. Although the pace of exports is likely to slow with smaller supplies and higher prices during the last third of 2006, export share of supply is expected to return to the decade average of 18 percent.

Dry Peas and Lentils

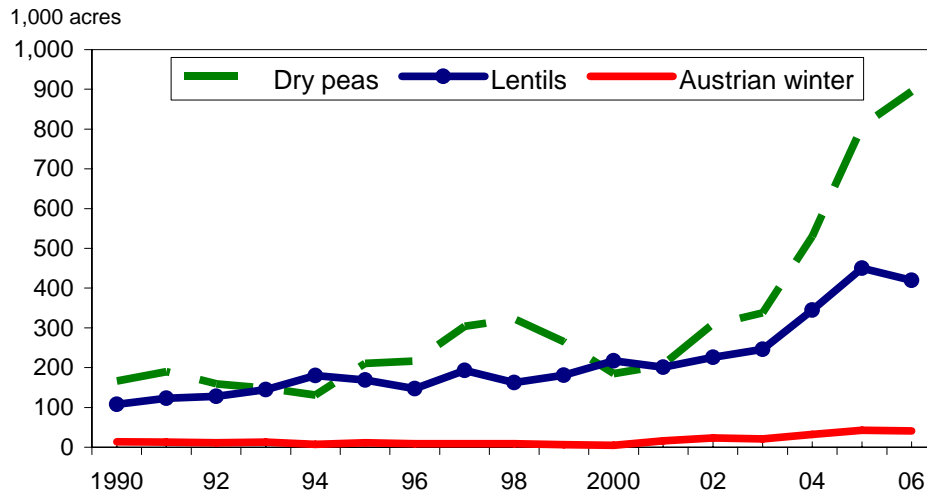
Acreage Changes Less Robust

With stronger-than-anticipated competition from wheat and other crops this spring, dry edible pea acreage rose less than projected, while lentil acreage declined. Area planted to dry edible peas rose 11 percent to 895,000 acres, with virtually all the gain in the upper Midwest. Growers in the traditional production areas of Washington and Idaho actually reduced dry pea area. With higher stocks and lower prices the past year, lentil acreage (apparently driven by attractive market prices the past few years) declined 7 percent to 420,000 acres. Lentils, primarily a food crop, rely on strong food aid purchases and commercial export demand rather than the domestic food market. Due to short supplies in countries such as India, the world market may again hold some promise in the coming year. This could add support to prices while reducing LDP payments and CCC loan exposure.

During the April-June quarter of the 2005/06 marketing year (July-June), grower prices (as reported in *Agricultural Prices*) for dry edible peas remained even with a year earlier at \$5.41/cwt. After prices peaked in May (at \$6.14/cwt), the market fell in June and again slightly to open the 2006/07 marketing year in July, with a preliminary dry pea price of \$5.20/cwt. In the coming year, dry pea prices may be supported by a smaller-than-expected crop this year, expectations for a smaller crop in Canada, and manageable carryover stocks. For lentils, relatively high carryover stocks weighed on grower prices, which bottomed out in June at \$7.75/cwt. Lentils then opened the 2006/07 marketing year in July at \$9.34/cwt, although this price may be revised lower in September. According to the *Bean Market News*, August prices for top grade lentils have increased from a month earlier, likely aided by expectations of reduced domestic supplies in the year ahead. Also, hopes for a strong export season have been fueled in part by expectations of lower area and yields in Canada, a major competitor in world markets. For all chickpeas, grower prices are expected to average below a year earlier given increased acreage and an expected larger U.S. crop. Prices for all chickpeas averaged \$25.30/cwt during the April-June quarter (down 9 percent from a year earlier), with the preliminary July price dropping just below \$20/cwt—the lowest since the previous August.

Figure 8

U.S. dry peas and lentils: Acres planted, 1990-2006



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

Table 16--U.S. dry peas and lentils: Monthly grower prices by class, 2005-2006

Year & month	Dry peas	Chickpeas			Austrian winter peas	All Lentils
		All	Large	Small		
--- Cents per pound ---						
2005						
January	5.93	23.60	23.70	--	8.44	15.00
February	6.03	29.20	30.10	--	9.49	13.80
March	5.64	29.00	29.30	--	7.63	13.50
April	5.59	25.00	25.00	--	8.70	13.10
May	5.18	17.20	19.10	--	9.83	12.30
June	5.39	36.20	36.60	--	9.40	12.10
July	5.21	27.90	28.20	--	9.28	11.80
2006						
January	4.80	27.20	27.80	--	8.00	12.40
February	4.97	26.40	31.20	18.50	--	11.00
March	5.11	22.20	25.20	--	6.36	11.20
April	4.85	22.50	29.20	--	6.42	9.60
May	6.14	24.70	--	21.80	--	9.77
June	5.25	28.70	31.30	10.80	--	7.75
July 1/	5.20	19.90	29.30	--	--	9.34

-- = not available. 1/ Prices for July 2006 are partial-month averages.

Source: USDA, NASS, *Agricultural Prices*.

Price Support Activity

With lower market prices and a larger crop, lentil CCC loans and loan forfeitures were higher in 2005/06 than the previous year. As of August 8, about \$15.5 million in CCC loans were made for 2005/06 lentils, with about 13 percent of the volume forfeited as market prices declined. As of this date, 48 percent of 2005/06 lentil loans remained outstanding. About 27 percent of all 2005/06 lentils in the price support program were placed under loan, compared with just 6 percent of the dry pea volume. The Loan Deficiency Payments (LDPs) for 2005/06 lentils totaled \$6.1 million, compared with just \$113,677 in 2004/05. With the new crop harvest of both dry peas and lentils well under way, growers have now begun to put the 2006/07 crop under loan or request loan deficiency payments.

Through August 8, with posted prices remaining below loan rates all season, there were 7,925 requests for LDPs covering 14.88 million cwt of 2005/06 dry peas. With an average payment rate of \$2.37 per cwt, the value of these LDPs was \$35.2 million (compared with \$31.5 million in 2004/05). North Dakota accounted for 63 percent of the 2005/06 dry pea LDP volume. Compared with lentils, non-recourse loan activity was again light for dry peas in 2005/06, with 172 loans made on a total of 0.92 million cwt (valued at \$5.58 million). As of August 8, less than 5 percent of 2005/06 loans remained outstanding. North Dakota accounted for 54 percent of total 2005/06 loan volume.

Banner Year for Exports in 2005/06

During the 2005/06 marketing year (July-June), U.S. export volume for dry peas and lentils surged 88 percent to 12.6 million cwt. With the exception of split peas, volume was higher for every major trade category, led by miscellaneous dry peas, yellow peas, and lentils. Because of a short crop in 2005, Spain increased imports from the United States, taking 17 percent of 2005/06 U.S. dry pea and lentil export volume—up from 7 percent a year earlier. About 68 percent of volume shipped to Spain consisted of unspecified dry peas, and 26 percent was lentils.

Mushrooms

Production and Value Lower in 2005/06

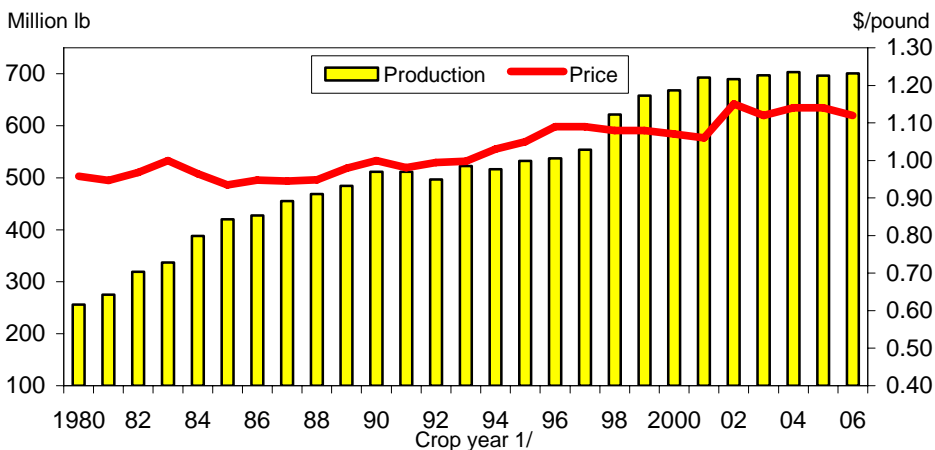
The farm value of all mushroom sales during the 2005/06 crop year (July-June), totaled \$881 million, down 3 percent from the previous year. Total U.S. mushroom sales volume declined 1 percent to 843 million pounds as a 2 percent drop in growing area outweighed a 1 percent gain in yield, which reached a record-high 5.92 pounds per square foot. The sales volume of processing agaricus mushrooms resumed its unsteady downward trend, reaching its lowest level since 1966/67. Fresh agaricus sales volume recovered most of its loss of a year ago, rising 1 percent to 701 million pounds and accounting for 84 percent of all agaricus sales. On the processing side, agaricus volume dropped 9 percent from a year earlier and now stands 46 percent below a decade earlier. Processing sales declined despite a concurrent decline of 10 percent in imports of canned mushrooms. With demand apparently soft, average prices for fresh-market mushrooms slipped 2 percent to \$1.12 per pound, while the unit value of processing mushrooms dropped 8 percent to \$0.43 cents per pound—the lowest nominal dollar price since 1974/75.

The sales volume of specialty mushrooms (excluding brown agaricus), most of which are sold in the fresh market, declined 10 percent to 13.5 million pounds. Shiitake and oyster mushroom sales each increased. Volume declined across all types, including Shiitake (down 10 percent), which accounted for 57 percent of specialty volume. Brown agaricus mushrooms (including Portabello and Crimini varieties) remained a bright spot in the industry, with sales volume increasing 17 percent to 117 million pounds in 2005/06. Popular in both retail and foodservice venues, these varieties now account for 14 percent of total agaricus volume and 18 percent of agaricus sales value. Brown agaricus volume was more than twice that of 1997/98, when sales totaled 47 million pounds. Per capita use of all mushrooms declined 3 percent to 4.02 pounds in 2005/06 as a 1 percent gain in fresh use was outweighed by a 10 percent reduction in processing use (figure 10).

The volume of certified organic mushroom sales declined 7 percent to 32.5 million pounds in 2005/06. Specialty mushrooms accounted for 20 percent of organic sales, with the remainder agaricus. The share of the U.S. mushroom market consisting of certified organic products remained at 4 percent in 2005/06.

Figure 9

U.S. fresh-market agaricus mushrooms: Production & producer price



1/ Crop year ending with year listed (e.g., 1980 = 1979/80).

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

Intended agaricus bed and tray production area for the 2006/07 season is expected to decline 3 percent from a year earlier to 136 million square feet. While growers in Eastern and Central States each intend to reduce area, those in the Western States expect to increase square footage 1 percent led by California with a 3 percent gain expected. Given this drop in area, even if yields continue to trend higher in an attempt to spread rising costs over more units, U.S. agaricus mushroom production is likely to decline in the 2006/07 season from the 830 million pounds of 2005/06. As a result, mushroom imports are likely to rise during the coming year.

Table 17--U.S. agaricus mushrooms: Sales, price, and value, selected States

State	Volume of sales		Price		Value of sales	
	2004/05	2005/06	2004/05	2005/06	2004/05	2005/06
	1,000 pounds		Dollars per pound		1,000 dollars	
Pennsylvania	495,432	492,426	0.790	0.767	391,289	377,702
California	118,648	114,116	1.450	1.480	172,465	168,617
Other States	224,003	223,305	1.332	0.000	298,438	294,390
United States	838,083	829,847	1.030	1.010	862,192	840,709

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

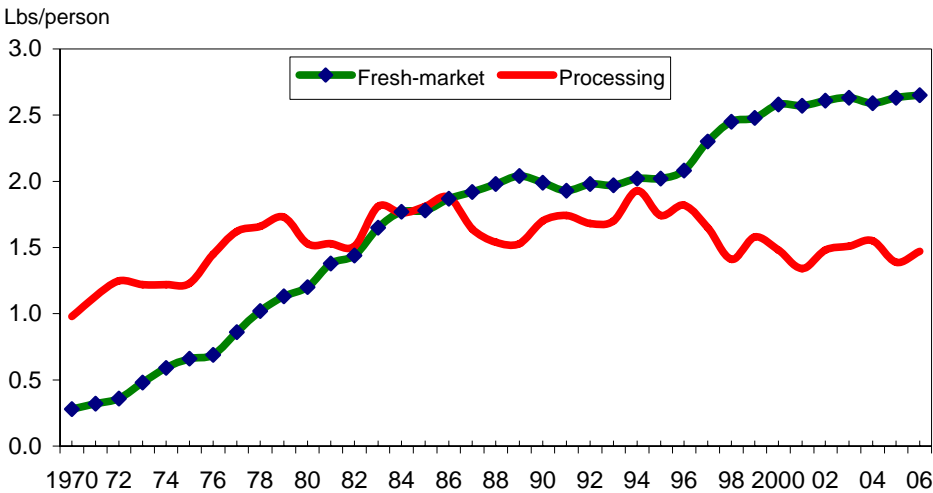
Table 18--U.S. brown agaricus & specialty mushrooms: Sales, price, and value

State	Volume of sales		Price		Value of sales	
	2004/05	2005/06	2004/05	2005/06	2004/05	2005/06
	1,000 pounds		Dollars per pound		1,000 dollars	
Brown 1/	100,528	117,297	1.29	1.30	130,167	152,164
All specialty	15,071	13,512	3.09	3.01	46,541	40,720
Shiitake	8,616	7,761	3.25	3.24	28,005	25,151
Oyster	5,128	4,563	2.35	2.15	12,035	9,809
Other	1,327	1,188	4.90	4.85	6,501	5,760
Total	115,599	130,809	1.53	1.47	176,708	192,884

1/ Includes Portobello and Crimini.

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

Figure 10
U.S. mushrooms: Per capita disappearance, 1990-2006



Source: Calculated by USDA, ERS.

Commodity Highlight: Rhubarb

Rhubarb is a widely known but narrowly used specialty crop in the United States. Introduced into the United States at the end of the 18th century, rhubarb (like other specialty vegetables), has flourished in backyard gardens throughout the northern parts of the country. Most consumers recognize this perennial cool-season crop for its longtime use as a key ingredient in strawberry-rhubarb pie. In fact, the close identification with this dessert spawned rhubarb's popular nickname, "pie plant". However, with consumers continually looking for new flavors and products, the unique tangy flavor of rhubarb may be finding new favor among chefs and other culinary leaders. In addition to the traditional use in pies, rhubarb has served as a zesty sidedish for meats and seafood, as a salad ingredient, and in recipes for sauces, tarts, preserves, jams, and soups.

According to *The Rhubarb Compendium*, there are many species of rhubarb, including food, medicinal, and ornamental varieties 1/. Although the garden rhubarb (*Rheum rhabarbarum* L.) is used like a fruit in various recipes, botanically it is a vegetable. Rhubarb is a member of the buckwheat family (*Polygonaceae*), which also includes sorrel (an herb) and a variety of medicinal herbs. Rhubarb grown in the United States differs in size and appearance from Chinese rhubarb (*Rheum palmatum*), whose roots and rhizomes are favored for medicinal purposes (e.g., as a purgative and digestive aid).

The edible petioles (stalks) of garden rhubarb can be green, red, or pink, depending on variety. Although red varieties are more commonly produced today, yield per acre is generally greater for green varieties. The stalks of rhubarb are edible, but the inedible broad leaves contain a toxic substance (oxalic acid), which can cause life-threatening illness. Although rarely consumed without some preparation, rhubarb in all forms remains a good source of dietary fiber and vitamin C.

Production Is Concentrated

According to the 2002 Census of Agriculture (census), 467 farms harvested rhubarb from 1,809 acres (table 19). Although these farms were spread over 30 States, only Washington (824 acres), Michigan (144 acres), and Oregon (undisclosed but known

Table 19--U.S. rhubarb: Field-grown area harvested in selected States

Item	1987	1992	1997	2002	Change
					1997-2002
					Percent
					--Acres--
Washington	259	361	697	824	18.2
Oregon	345	307	490	1/	--
Michigan	183	93	153	144	-5.9
Ohio	1/	4	9	45	400.0
New York	6	4	184	36	-80.4
Georgia	--	--	--	20	--
New Jersey	13	4	11	12	9.1
Wisconsin	7	11	18	9	-50.0
Others	94	77	150	719	--
United States	907	861	1,712	1,809	5.7

-- = not available or applicable. 1/ Not shown to avoid disclosure of individual farms.

Source: USDA, National Agricultural Statistics Service, *Census of Agriculture* (table 29).

1/ From *The Rhubarb Compendium*. August 2006.
<http://www.rhubarbinfo.com>

Table 20--Oregon rhubarb: Area, yield, production, and value, 1980-2005

Year	Area harvested Acres	Yield per acre Cwt	Production 1,000 cwt	Farm price \$/cwt	Crop value \$ 1,000
1980	250	170	43.17	9.61	415
1985	284	190	53.85	15.26	822
1990	324	220	67.20	16.29	1,095
1995	435	200	86.40	16.64	1,438
2000	510	100	52.60	19.03	995
2001	465	101	46.95	19.38	910
2002	438	120	52.64	20.93	1,102
2003	438	129	56.44	20.91	1,180
2004	403	149	59.90	20.90	1,252
2005	395	158	62.35	20.50	1,278

Note: Cwt = hundredweight, a unit of measure equal to 100 pounds.

Source: Oregon State University, OSU Extension Service, *OAIN Database*.

<http://oregonstate.edu/oain/Database/SignInDCS.asp>

to be 438 acres, see table 20) reported harvesting more than 100 acres of rhubarb. The farms in these three States account for close to 90 percent of all commercial rhubarb grown in the United States. Between 1997 and 2002, there was an increase in both the number of farms growing rhubarb (up 18 percent) and the National area harvested (up 6 percent). Rhubarb acreage is now twice as high as it was in 1987 (table 19).

Oregon is the only State for which a consistent, noncensus annual time series is available for rhubarb (table 20). According to Oregon State University's Oregon Agricultural Information Network (OAIN) database, higher yields (up 6 percent to 7.9 short tons per acre), drove the State's rhubarb crop up 4 percent to 6.2 million pounds in 2005. The value of the State's rhubarb crop was \$1.3 million, 2 percent higher than a year earlier. Clackamas County accounted for three-fourths of the State's 395 acres of rhubarb in 2005.

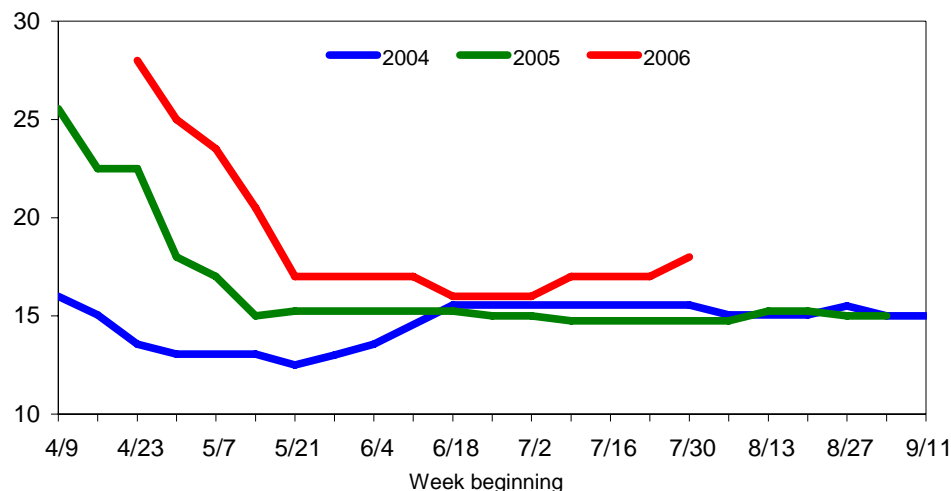
Fresh rhubarb is generally available from domestic sources throughout much of the year. The crop year for the bulk of field-grown rhubarb generally runs from April to September. However, according to the Market News Service, fresh product from Oregon and Washington has been available into November in wholesale markets during the past few years. After a brief respite in December, hothouse product becomes available from Washington and Michigan during January to April. Rhubarb (red varieties) grown under cover in sheds is produced from roots lifted from the field and planted in dark, warm beds to produce the smoother, milder, pinkish stems that characterize hothouse rhubarb.

According to the 2002 census, 59 percent of rhubarb area was harvested to be used for processed products. About 8 percent of all farms with rhubarb sold product for processing, with the remainder of farms concentrating on the fresh market, where prices are traditionally stronger. Four States, Washington, Oregon, Michigan, and Ohio, harvested product for processing in 2002, with Washington (53 percent of processing acreage) and Oregon (34 percent) accounting for the bulk of area for processing.

Figure 11

U.S. fresh-market rhubarb, all: Weekly f.o.b. shipping-point prices

\$/20-lb carton



Source: USDA, Agricultural Marketing Service, Market News, FV Data Portal.

Because yields for processing are generally greater than for the fresh market (due to culling of lower-grade product unacceptable to many quality-conscious fresh-market consumers), the share of volume that moves to processors is likely higher than the 59 percent of area indicated by the census. According to industry sources, about three-fourths of U.S. rhubarb is processed, with most of that used for freezing. A small amount of rhubarb is also canned or dehydrated (freeze-dried). Most rhubarb that is frozen is packed for commercial and institutional use, with smaller volumes packed for retail (supermarket) sale.

F.o.b. shipping-point prices for rhubarb are routinely reported by USDA’s Market News Service. On average, data from Oregon suggests that rhubarb grower prices have remained relatively flat over the past several years. However, according to Market News data, in 2006, weekly prices for fresh-market rhubarb have consistently averaged above those of the past 2 years (figure 11). This may reflect both the impact of weather on yields and stronger demand resulting from efforts by the industry to promote the product.

Thin Data Leaves Use Trends Uncertain

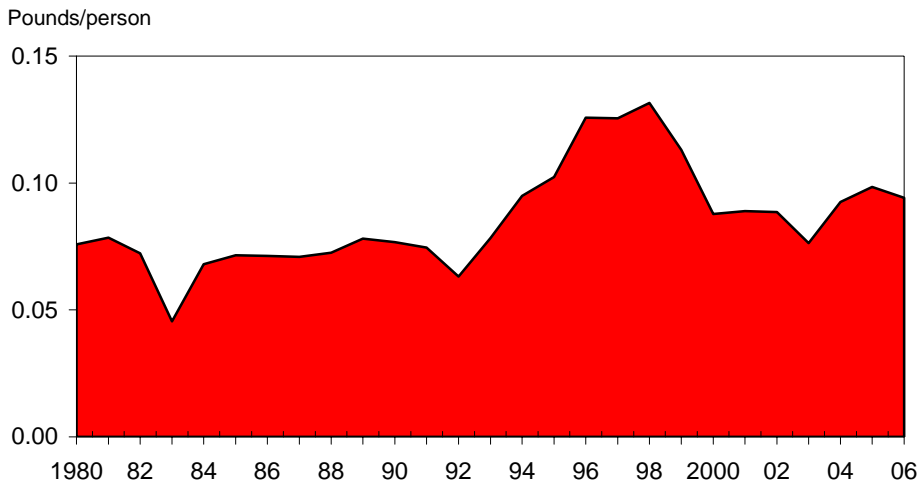
Like most other specialty crops with limited acreage, aside from the census and data reported for Oregon—the second-leading producing State—little acreage, yield, or production data exist for rhubarb. Additionally, because the U.S. trade data provided by the Census Bureau does not contain a code specifically for rhubarb, official estimates of foreign trade are also lacking. Because of these limited data, ERS estimates of supply and use of this crop are approximations, based largely on interpolated census acreage, yields reported in Oregon (as a proxy national yield), and approximated foreign trade. Exports of fresh rhubarb to Canada, by far the leading foreign market for most U.S. vegetables, have been available via Canadian import data. Some rhubarb is known to be imported, since Market News data specifically indicates imports of fresh rhubarb from the Netherlands (likely hothouse-produced, based on the period of entry), while past Animal and Plant

Health Inspection Service (APHIS) data have shown sporadic imports of fresh and frozen product from other nations.

Cobbling together these sources yields a brief picture of trends in the rhubarb industry over the past decade. The increasing acreage indicated by the census has helped rhubarb production to creep up over the past decade. This larger acreage apparently offset lower yields, which may have resulted from a continued shift toward the more colorful but lower-yielding red varieties.

Despite the small increase in supply, increasing population has outweighed gains in supply, resulting in a slow erosion of per capita disappearance since the most recent peak in the late 1990's (figure 12). There appears to have been a surge in rhubarb demand during the second half of the 1990s, which was apparently not maintained into the 2000s. Per capita use at the start and end of this surge in the late 1990s was relatively unchanged. On a fresh-weight basis, disappearance of rhubarb for all uses averaged 0.09 pound per person during 2003-05—unchanged from 1993-95, but above the 0.07 pound estimated for 1983-85. Based on the current data, future trends are unclear for the rhubarb industry. However, continuing to broaden the scope of rhubarb markets, while searching for new uses, appears to be the key.

Figure 12
U.S. rhubarb, all uses: Per capita disappearance, 1980-2006



Source: Estimated and prepared by USDA, Economic Research Service.

Contacts and Links

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Covers potatoes, sweet potatoes, long-run outlook

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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. *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.

2. *Greenhouse Tomatoes Change the Dynamics of the North American Fresh Tomato Industry*

<http://www.ers.usda.gov/Publications/ERR2/>

The North American greenhouse tomato industry has grown rapidly since the early 1990s and now plays a major role in the fresh tomato industry. However, relatively little is known about this new industry, in part because of the lack of reliable production, trade, and price data. Both analysts and industry members will benefit from a more comprehensive understanding of the rising greenhouse industry and its effect on the entire fresh field tomato sector.

3. *Understanding Fruit and Vegetable Choices—Research Briefs*

<http://www.ers.usda.gov/publications/aib792/>

USDA's Food Guide Pyramid recommends 2-4 servings of fruit and 3-5 servings of vegetables daily. As a member of the 5-A-Day public-private partnership, USDA partners with other government agencies and private sector groups to promote the health benefits of fruits and vegetables. Yet consumption of these healthful foods still does not meet dietary recommendations. How can we better understand the reasons for the persistent difficulty in increasing produce consumption? This series of research briefs provides information on the economic, social, and behavioral factors influencing consumers' fruit and vegetable choices.

4. Price Premiums Hold on as U.S. Organic Produce Market Expands

<http://www.ers.usda.gov/Publications/vgs/may05/VGS30801/>

Price premiums for organic products have contributed to growth in certified organic farmland and, ultimately, market expansion. This article explores price premiums and market margins for a limited set of fresh organic produce items, including carrots, broccoli, and mesclun mix.

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 use (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. Vegetables and Melons: ERS' Vegetables and Melons Briefing Room contains special articles, data, and links.

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

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

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

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

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

D. Dry Beans: ERS' Dry Bean Briefing Room contains special articles, data, and links.

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

E. 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.ams.usda.gov/fv/mnacs/index.htm>

F. 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>

G. FAS, HTP: USDA, Foreign Agricultural Service's Horticultural and Tropical Products web site.

<http://www.fas.usda.gov/htp/default.htm>

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

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

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

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, 1995-2006 1/

Item	Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Annual
--1910-14=100--														
Commercial vegetables 2/	1995	803	772	989	1,161	1,037	808	653	680	781	651	658	678	806
	1996	631	742	986	818	691	774	661	775	679	727	747	643	740
	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	756	763	830	878	935	1,024	805	925	969	962	1,048	1,177	923
	2004	849	966	773	884	753	747	836	889	901	1,067	1,112	807	882
2005	636	806	1,096	1,230	897	942	765	801	884	769	791	1,132	896	
2006	874	835	966	1,081	1,067	870	787							
Potatoes 3/	1995	466	450	484	505	529	612	729	586	497	539	548	547	541
	1996	564	589	633	668	696	707	700	521	482	461	452	434	576
	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	485	492	450	486	510	515
2005	531	535	578	566	576	572	665	591	524	484	537	584	562	
2006	596	622	683	671	678	716	726							
--1990-92=100--														
Commercial vegetables 2/	1995	120	116	148	174	155	121	98	102	117	97	98	101	121
	1996	94	111	147	122	103	116	99	116	102	109	112	96	111
	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	113	114	124	131	140	153	120	138	145	144	157	176	138
	2004	127	144	116	132	113	112	125	133	135	160	166	121	132
2005	95	121	164	184	134	141	114	120	132	115	118	169	134	
2006	131	125	145	162	160	130	118							
Potatoes 3/	1995	92	89	96	100	105	121	144	116	98	106	108	108	107
	1996	111	116	125	132	138	140	138	103	95	91	89	86	114
	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	96	97	89	96	101	102
2005	105	106	114	112	114	113	131	117	104	96	106	115	111	
2006	118	123	135	133	134	141	144							

1/ Prices for 2006 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/data-sets/specialty/89011/>

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

Price table 5—Fresh-market vegetables: U.S. average retail prices, by month, 1997-2006

Item	Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Annual	Change	
															July- July	
															<i>Percent</i>	
															<i>--Cents/lb.--</i>	
Potatoes, white	1997	33.5	33.1	33.0	33.5	33.8	34.5	36.7	38.8	38.8	37.4	36.6	37.0	35.6	-10.0	
	1998	36.2	36.2	36.8	36.9	38.1	39.0	39.2	38.2	37.6	37.9	37.0	37.5	37.6	6.8	
	1999	38.1	38.2	38.4	38.0	38.8	37.9	37.6	41.1	42.9	41.3	39.3	38.4	39.5	39.4	4.8
	2000	39.2	40.1	39.3	38.8	37.9	37.6	39.0	39.0	40.0	37.4	36.7	35.1	34.7	38.0	-5.1
	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	39.0	4.9
	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	49.3	34.2
	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	45.9	-15.5
	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	45.4	1.5
	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	47.1	1.3
2006	50.4	51.7	51.7	52.2	53.3	54.1	55.6								16.6	
Broccoli	1997	109.8	115.6	103.2	92.2	88.6	92.1	96.8	90.5	90.3	104.0	100.3	92.6	98.0	-0.3	
	1998	137.9	106.6	112.2	111.4	123.8	108.7	107.6	103.0	101.4	104.0	101.6	97.4	109.6	11.2	
	1999	112.3	99.9	99.0	101.2	95.2	94.4	99.3	96.2	105.2	102.8	100.1	100.4	100.5	-7.7	
	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	113.8	14.7
	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	98.5	-13.9
	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	119.4	14.1
	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	120.0	1.3
	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	119.5	-5.6
	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	131.8	34.9
2006	135.5	149.3	135.8	136.7	137.3	143.2	151.1								4.8	
Lettuce, iceberg	1997	65.1	59.4	61.4	66.6	59.8	59.3	64.9	69.4	73.7	82.3	101.0	69.9	69.4	3.5	
	1998	107.2	64.3	69.5	83.7	87.7	71.1	69.2	68.6	71.0	75.7	76.5	63.5	75.7	6.6	
	1999	64.9	65.8	77.4	75.3	69.1	65.2	62.7	65.2	62.3	66.9	67.7	66.8	67.4	67.4	-9.4
	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	73.6	4.6
	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	79.3	1.1
	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	86.1	1.7
	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	82.3	19.9
	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	79.8	-8.8
	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	87.0	20.1
2006	87.4	79.4	81.5	86.9	96.7	84.8	78.3								-11.5	
Tomatoes, field grown	1997	121.3	131.4	165.4	134.8	117.5	130.0	114.1	113.0	109.1	116.2	137.0	161.7	129.3	129.3	10.7
	1998	145.2	135.6	151.5	139.8	147.2	139.3	151.5	131.2	124.1	157.3	168.9	179.8	147.6	147.6	32.8
	1999	190.4	147.6	139.5	129.8	128.4	130.4	128.7	123.2	127.2	127.9	130.0	140.5	137.0	137.0	-15.0
	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	138.2	-0.4
	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	132.0	-2.0
	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	132.5	-1.1
	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	150.9	17.5
	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	160.6	-14.2
	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	161.1	28.3
2006	216.2	191.0	164.9	157.3	154.3	145.7	147.9								-8.0	
Lettuce, romaine 1/	2006	134.1	140.5	138.3	147.6	147.6	132.0	123.7							--	
Peppers, sweet 2/	2005	--	--	--	--	--	--	--	--	--	192.7	--	--	--	--	
	2006	--	--	--	--	163.8	169.5	176.8							--	

-- = 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 7—Canned vegetables: Quarterly wholesale price trends, 1997-2006 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		
											-- \$/case --	\$/lb	\$/case	
1997														
I	7.38	11.75	7.08	9.67	9.05	14.46	7.79	10.46	7.63	11.50	0.30	17.17		
II	7.00	10.83	6.67	8.75	8.88	13.75	7.75	10.46	7.83	11.50	0.30	15.13		
III	7.05	11.08	6.75	8.75	8.58	13.63	7.67	10.50	8.00	11.08	0.30	15.42		
IV	7.17	10.38	7.00	9.84	8.88	13.00	7.88	10.50	7.88	10.33	0.31	16.25		
Average	7.15	11.01	6.88	9.25	8.85	13.71	7.77	10.48	7.84	11.10	0.30	15.99		
1998														
I	7.21	10.63	7.05	8.63	8.13	11.25	7.84	11.00	7.92	10.58	0.33	16.42		
II	7.38	10.88	7.13	9.75	8.50	10.88	7.88	11.13	7.88	10.75	0.33	16.92		
III	7.25	10.75	7.21	9.96	8.21	12.58	7.25	10.58	7.25	10.92	0.38	19.00		
IV	7.25	10.75	7.21	9.96	8.38	12.75	7.25	10.50	7.25	11.00	0.45	21.00		
Average	7.27	10.75	7.15	9.58	8.31	11.87	7.56	10.80	7.58	10.81	0.37	18.34		
1999														
I	7.25	10.75	7.50	10.38	8.80	13.30	7.33	10.67	7.42	11.00	0.45	21.00		
II	7.33	10.63	7.50	10.38	8.71	13.21	7.79	11.29	8.09	11.83	0.46	21.00		
III	7.50	10.63	7.50	10.38	8.75	13.58	7.88	11.38	8.09	12.00	0.46	21.00		
IV	7.63	12.34	7.46	10.92	8.75	13.58	7.88	11.13	8.04	11.75	0.35	20.29		
Average	7.43	11.09	7.49	10.52	8.75	13.42	7.72	11.12	7.91	11.65	0.43	20.82		
2000														
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		
2001														
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		
2002														
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		
2003														
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		
2004														
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		
2005														
I	8.58	14.04	8.54	13.54	8.96	15.67	9.00	11.75	8.83	14.58	0.30	20.25		
II	8.75	13.58	8.63	13.25	9.13	15.42	9.00	11.75	9.00	14.17	0.30	20.17		
III	8.75	13.42	8.80	12.96	9.13	15.33	8.88	12.00	9.00	13.92	0.30	20.00		
IV	8.50	13.25	8.50	13.25	9.13	15.25	8.75	11.75	9.00	13.63	0.31	20.50		
Average	8.65	13.57	8.62	13.25	9.09	15.42	8.91	11.81	8.96	14.08	0.30	20.23		
2006														
I p	8.63	12.25	8.88	12.13	9.25	15.46	8.88	12.00	9.05	12.75	0.36	21.75		
II p	8.63	12.25	8.75	12.13	9.17	15.50	8.88	12.00	9.03	12.25	0.37	23.25		
III f	8.55	12.25	8.80	12.25	9.00	15.25	9.00	12.00	9.00	12.25	0.38	23.50		
IV f	8.50	12.75	8.50	12.75	9.10	15.25	9.00	12.00	9.00	12.50	0.37	23.50		
Average	8.58	12.38	8.73	12.32	9.13	15.37	8.94	12.00	9.02	12.44	0.37	23.00		

p = Preliminary. f = ERS forecast.

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, 1997-2006 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
--\$ per case--												
1997												
I	6.90	0.50	6.88	0.48	7.10	0.51	9.20	0.65	10.23	0.68	7.98	0.42
II	6.90	0.50	6.83	0.47	7.10	0.50	9.20	0.65	9.93	0.69	8.30	0.42
III	6.90	0.50	6.83	0.47	7.10	0.49	9.20	0.65	9.93	0.69	8.30	0.42
IV	6.83	0.47	6.83	0.47	6.90	0.48	9.20	0.65	9.93	0.69	8.30	0.42
Average	6.88	0.49	6.84	0.47	7.05	0.50	9.20	0.65	10.01	0.69	8.22	0.42
1998												
I	6.83	0.46	6.83	0.47	6.90	0.47	9.20	0.65	10.08	0.70	8.30	0.42
II	6.83	0.45	6.83	0.47	6.90	0.46	9.20	0.65	10.15	0.70	8.30	0.42
III	6.83	0.44	6.83	0.45	6.75	0.45	9.20	0.65	10.15	0.70	8.30	0.42
IV	6.83	0.44	6.83	0.45	6.87	0.45	9.47	0.70	10.15	0.72	8.33	0.42
Average	6.83	0.45	6.83	0.46	6.86	0.46	9.27	0.66	10.13	0.71	8.31	0.42
1999												
I	6.83	0.44	6.83	0.45	6.88	0.46	9.47	0.70	10.15	0.72	8.30	0.44
II	6.83	0.44	6.83	0.45	6.88	0.46	9.47	0.70	10.15	0.72	8.30	0.44
III	6.83	0.45	6.83	0.46	6.91	0.51	9.47	0.70	10.15	0.72	8.30	0.43
IV	6.83	0.45	6.83	0.47	6.93	0.54	9.47	0.70	10.15	0.72	8.30	0.43
Average	6.83	0.45	6.83	0.46	6.90	0.49	9.47	0.70	10.15	0.72	8.30	0.44
2000												
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
2001												
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
2002												
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
2003												
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
2004												
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
2005												
I	7.30	0.54	7.33	0.58	7.28	0.57	9.47	0.72	10.15	0.72	8.30	0.50
II	7.30	0.54	7.33	0.58	7.28	0.57	9.47	0.72	10.15	0.72	8.30	0.50
III	7.30	0.54	7.30	0.56	7.30	0.56	9.47	0.72	10.15	0.72	8.30	0.50
IV	7.30	0.55	7.30	0.55	7.30	0.55	9.47	0.72	10.15	0.72	8.30	0.50
Average	7.30	0.54	7.31	0.57	7.29	0.56	9.47	0.72	10.15	0.72	8.30	0.50
2006												
I p	7.10	0.50	7.25	0.56	7.23	0.52	9.47	0.72	10.15	0.72	8.32	0.52
II p	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 f	7.55	0.50	7.63	0.55	7.75	0.56	9.47	0.72	10.38	0.73	8.75	0.49
IV f	7.50	0.50	7.50	0.55	7.75	0.57	9.47	0.72	10.38	0.73	8.50	0.49
Average	7.38	0.50	7.50	0.56	7.59	0.55	9.47	0.72	10.30	0.72	8.60	0.50

p = Preliminary. 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.

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

Price table 10—U.S. fresh-market herbs: Selected monthly wholesale prices in San Francisco, CA, 2005-2006

Herb	Unit	2005			2006			Change from prev. year		
		April	May	June	April	May	June	April	May	June
		-- \$/cwt --						--- Percent ---		
Anise	24-ct crtn	14.75	16.50	16.31	18.50	14.90	14.38	25.4	- 9.7	- 11.8
Arrugula	12-ct ctns	7.75	7.75	7.75	7.50	7.50	7.50	- 3.2	- 3.2	- 3.2
Basil	12-ct ctns	7.88	8.00	8.00	8.75	8.63	8.31	11.0	7.9	3.9
Celeriac	12-ct ctns	10.50	10.50	10.50	10.50	10.50	13.88	.0	.0	32.2
Chervil	12-ct flmbag	6.50	6.50	6.69	7.00	7.00	7.00	7.7	7.7	4.6
Chives	12-ct flmbag	5.00	5.00	4.78	5.00	6.50	6.50	.0	30.0	36.0
Cilantro	60-ct ctns	15.31	9.10	11.69	13.88	12.45	14.88	- 9.3	36.8	27.3
Cipolinos	10-lb ctns	17.50	19.10	19.50	18.50	18.50	18.50	5.7	- 3.1	- 5.1
Dill	12-ct ctns	7.19	7.25	7.31	7.13	7.70	8.00	- .8	6.2	9.4
Dry Eschallot	5-lb sack	5.41	5.90	5.00	4.88	4.75	5.00	- 9.8	- 19.5	.0
Horseradish	50-lb sack	2.00	2.00	2.13	2.10	2.15	2.15	5.0	7.5	.9
Lemon grass	Per lb-ctns	0.74	0.70	0.68	1.10	1.50	1.50	48.6	114.3	120.6
Marjoram	12-ct flmbag	5.50	5.50	5.50	5.38	5.45	5.50	- 2.2	- .9	.0
Oregano	12-ct flmbag	5.50	5.50	5.50	5.38	5.50	5.50	- 2.2	.0	.0
Rosemary	12-ct flmbag	5.50	5.50	5.50	5.38	5.50	5.50	- 2.2	.0	.0
Mint	12-ct ctns	7.63	7.50	7.50	7.75	7.60	8.25	1.6	1.3	10.0
Sage	12-ct flmbag	5.50	5.50	5.50	5.38	5.50	5.50	- 2.2	.0	.0
Salsify	5-1kg flmbg	26.50	24.10	23.50	23.50	23.50	23.50	- 11.3	- 2.5	.0
Savory	24-ct flmbag	5.50	6.00	5.88	5.50	5.50	5.50	.0	- 8.3	- 6.5
Sorrel	12-ct flmbag	5.50	5.50	5.50	5.38	5.50	5.38	- 2.2	.0	- 2.2
Tarragon	12-ct flmbag	6.13	6.50	6.50	7.00	7.00	7.00	14.2	7.7	7.7
Thyme	12-ct flmbag	5.50	5.50	5.50	5.50	5.50	5.50	.0	.0	.0
Verdulaga	24-ct flmbag	--	7.33	7.00	8.00	6.40	8.06	--	- 12.7	15.1
Watercress	12-ct ctns	10.50	7.50	7.44	9.88	10.50	10.50	- 5.9	40.0	41.1

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, 2003-06

Item	Annual			2005				2006			
	2003	2004	2005	Mar.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.
Market basket 1/											
Retail cost (1982-84=100)	185.3	194.4	198.2	196.4	199.2	199.8	200.8	202.5	201.3	200.8	199.9
Farm value (1982-84=100)	110.4	124.4	123.9	122.6	126.4	127.3	129.5	127.4	125.1	125.0	123.1
Farm-retail spread (1982-84=100)	225.6	232.1	238.3	236.2	238.5	238.8	239.2	242.9	242.4	241.6	241.3
Farm value-retail cost (%)	20.9	22.4	21.9	21.9	22.2	22.3	22.6	22.0	21.8	21.8	21.6
Fresh fruit											
Retail cost (1982-84=100)	309.0	318.5	330.7	312.3	341.6	346.6	348.2	352.2	345.3	339.9	338.5
Farm value (1982-84=100)	163.2	200.5	173.4	159.7	182.2	191.1	205.1	190.8	191.2	184.8	174.8
Farm-retail spread (1982-84=100)	376.3	372.9	403.3	382.8	415.2	418.4	414.3	426.7	416.4	411.5	414.1
Farm value-retail cost (%)	16.7	19.9	16.6	16.2	16.9	17.4	18.6	17.1	17.5	17.2	16.3
Fresh vegetables											
Retail cost (1982-84=100)	250.5	261.2	271.7	267.0	274.1	274.6	288.3	300.6	289.7	279.7	276.8
Farm value (1982-84=100)	149.9	146.5	145.5	150.2	134.8	132.8	181.3	171.5	156.4	143.8	176.3
Farm-retail spread (1982-84=100)	302.2	320.2	336.7	327.0	345.7	347.5	343.3	367.0	358.2	349.6	328.5
Farm value-retail cost (%)	20.3	19.0	18.2	19.1	16.7	16.4	21.4	19.4	18.3	17.5	21.6
Processed fruits and vegetables											
Retail cost (1982-84=100)	171.9	183.1	192.3	189.9	194.1	194.2	196.7	197.8	199.0	198.9	197.1
Farm value (1982-84=100)	108.4	125.4	150.9	143.8	158.1	157.8	159.5	169.2	172.4	178.6	177.9
Farm-retail spread (1982-84=100)	191.8	201.1	205.3	204.3	205.3	205.6	208.3	206.7	207.3	205.2	203.1
Farm value-retail cost (%)	15.0	16.3	18.7	18.0	19.4	19.3	19.3	20.3	20.6	21.4	21.5
Fats and oils											
Retail cost (1982-84=100)	157.4	167.8	167.7	167.0	168.6	166.2	165.2	169.9	170.4	168.5	165.0
Farm value (1982-84=100)	113.4	128.4	108.2	113.9	110.9	104.9	101.8	100.4	104.9	111.1	99.5
Farm-retail spread (1982-84=100)	173.5	182.3	189.6	186.5	189.8	188.7	188.5	195.5	194.5	189.6	189.1
Farm value-retail cost (%)	19.4	20.6	17.3	18.3	17.7	17.0	16.6	15.9	16.6	17.7	16.2
Meat products											
Retail cost (1982-84=100)	169.0	183.2	187.5	187.6	186.6	187.3	187.8	187.9	188.2	188.6	188.4
Farm value (1982-84=100)	108.4	116.9	124.0	122.1	126.0	126.5	126.8	127.8	128.6	129.2	129.0
Farm-retail spread (1982-84=100)	231.1	251.3	252.8	254.8	248.8	249.7	250.4	249.5	249.3	249.6	249.4
Farm value-retail cost (%)	32.5	32.3	33.5	33.0	34.2	34.2	34.2	34.5	34.6	34.7	34.7
Dairy products											
Retail cost (1982-84=100)	167.9	180.2	182.4	181.4	182.6	183.5	183.2	183.7	183.4	183.0	181.3
Farm value (1982-84=100)	99.1	125.9	118.7	122.6	121.6	119.3	114.9	113.8	107.2	100.8	96.1
Farm-retail spread (1982-84=100)	231.3	230.3	241.1	235.6	238.8	242.7	246.2	248.2	253.7	258.8	259.9
Farm value-retail cost (%)	28.3	33.5	31.2	32.4	32.0	31.2	30.1	29.7	28.0	26.4	25.4
Poultry											
Retail cost (1982-84=100)	169.1	181.7	185.3	185.0	186.5	187.6	183.8	181.5	181.4	182.1	180.5
Farm value (1982-84=100)	113.0	142.9	139.4	137.7	142.1	140.4	132.0	122.7	122.2	119.8	112.9
Farm-retail spread (1982-84=100)	233.7	226.4	238.1	239.4	237.6	241.9	243.5	249.1	249.6	253.8	258.3
Farm value-retail cost (%)	35.8	42.1	40.3	39.8	40.8	40.1	38.4	36.2	36.0	35.2	33.5
Eggs											
Retail cost (1982-84=100)	157.3	167.0	144.1	145.1	144.1	149.5	154.7	157.9	147.6	153.1	150.6
Farm value (1982-84=100)	102.0	92.2	60.1	56.2	54.0	82.8	96.9	75.3	51.7	85.8	54.6
Farm-retail spread (1982-84=100)	256.5	301.4	295.2	304.8	306.0	269.3	258.5	306.4	319.9	274.1	323.0
Farm value-retail cost (%)	41.7	35.5	26.8	24.9	24.1	35.6	40.2	30.6	22.5	36.0	23.3
Cereal and bakery products											
Retail cost (1982-84=100)	202.8	206.0	209.0	208.5	209.4	209.1	208.4	210.6	210.3	210.9	210.9
Farm value (1982-84=100)	93.5	103.7	96.4	96.6	99.7	100.6	99.8	100.3	102.7	106.1	107.6
Farm-retail spread (1982-84=100)	218.0	220.3	224.6	224.1	224.7	224.2	223.5	226.0	225.3	225.5	225.3
Farm value-retail cost (%)	5.6	6.2	5.7	5.7	5.8	5.9	5.9	5.8	5.9	6.2	6.2

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://preview.ers.usda.gov/publications/agoutlook/aotables/2006/04Apr/aotab08.xls>