



United States
Department
of Agriculture

VGS-296

April 17, 2003



Electronic Outlook Report from the Economic Research Service

www.ers.usda.gov

Vegetables and Melons Outlook

Gary Lucier and Charles Plummer

Spring Potato Crop Up 2 Percent

Spring potato production for 2003 is forecast at 23.7 million hundredweight (cwt), up 2 percent from last year. Area for harvest is estimated at 83,800 acres, down 3 percent from last year but 10 percent above 2001. Per-acre yields are forecast to average 282 cwt, up 4 percent from a year ago. A 6-percent increase in U.S. potato production last fall, combined with a 15-percent increase in Canadian production, has put downward pressure on grower prices. As a result, U.S. grower prices for potatoes during September through March averaged 3 percent below year-earlier levels. Fresh-market prices are down 5 percent from year-earlier levels for September through February.

Including asparagus and onions, selected fresh-market vegetable area for harvest was forecast to decline 1 percent to 309,600 acres this spring season (largely April-June). California, which accounts for 51 percent of spring area, expects to harvest 2 percent fewer acres, with the entire reduction due to asparagus (down 15 percent), carrots (8 percent), and tomatoes (5 percent). Assuming average weather, spring fresh market vegetable prices are currently expected to average near or below those of a year earlier.

U.S. per capita use of melons totaled 27.5 pounds in 2002, down 3 percent from a year earlier. Cantaloup use rose 1 percent to 11.3 pounds per person in 2002—second only to the 1999 record of 11.5 pounds and 29 percent greater than the 1990-92 average. Reflecting reduced production (as growers reacted to a string of low prices during 1999-2001), watermelon use fell 8 percent to 13.9 pounds per person in 2002. Per capita use of honeydew melons rose 11 percent to 2.2 pounds, recovering losses in 2001 caused by reduced production.

Contract acreage for the five leading processing vegetables (tomatoes, sweet corn, snap beans, green peas, and cucumbers) is expected to remain about even with a year earlier at 1.28 million acres. Assuming yields remain near the average of the previous three seasons, production of the 11 selected processing vegetables could decline 1 percent from a year earlier to 17 million short tons—4 percent above the 2000-02 average.

U.S. dry bean growers have indicated they intend to plant fewer beans in 2003—acreage is expected to decline 21 percent to 1.52 million. This drop is in response to weak grower prices stemming from last year's large crop and stagnant domestic and export demand.

U.S. sweet potato growers intend to plant 93,500 acres in 2003, down 4 percent from last year and 5 percent below 2001 for comparable States. The area reduction comes despite relatively strong grower prices at the national level for the short 2002 crop.

Contents

[Industry Overview](#)

[Fresh-Market](#)

[Vegetables](#)

[Melons](#)

[Processing](#)

[Vegetables](#)

[Potatoes](#)

[Sweet Potatoes](#)

[Dry Edible Beans](#)

[Commodity](#)

[Highlight:](#)

[Watermelon](#)

[Contacts & Links](#)

[Appendix Tables](#)

Web Sites

[Veg. & Melons](#)

[Potatoes](#)

[Tomatoes](#)

[Dry Beans](#)

[Market News](#)

[NASS Statistics](#)

[FAS Horticulture](#)

The next release is

June 20, 2003

Approved by the
World Agricultural
Outlook Board

Industry Overview

Fresh vegetables: Spring-season (Apr.-June) area for harvest in 2003 (including asparagus and onions) fell 1 percent as higher acreage in Florida (4 percent) and Georgia (5 percent) was outweighed by declines in California (2 percent) and Texas (16 percent). With the exception of a few weeks of strong prices for warm season crops such as tomatoes and bell peppers, fresh-market prices have generally remained below a year ago. Combined January-February fresh-market vegetable import volume was up 10 percent from a year earlier led by tomatoes (up 18 percent).

Melons: Spring-season melon area for harvest is expected to rise 1 percent to 78,800 acres with cantaloupe (up 2 percent) accounting for all the gain. Shipping-point prices for imported cantaloupe were running about the same as a year ago (\$9 per 40-lb carton), with generally good quality.

Processing vegetables: U.S. vegetable processors indicated they have contracted for about the same area as in 2002. During the first 3 months of 2003, wholesale prices for frozen vegetables (up 2 percent) and canned vegetables (up 1 percent) were averaging above a year ago, while dehydrated vegetables were 5 percent lower.

Potatoes: Spring-season potato production for 2003 is forecast at 23.7 million cwt, up 2 percent from last year. Area for harvest is estimated at 83,800 acres, down 3 percent from last year but 10 percent above 2001. Fresh-market prices are down 5 percent from year-earlier levels for September through February, with prices declining steadily since November.

Sweet Potatoes: Barring any weather-related disasters this season, which could mean a return to average acreage abandonment and trend yields (160 cwt/acre), the 2003 U.S. sweet potato crop could reach 14.3 million cwt. That would be up 15 percent from a year ago, and 9 percent above the average of the last 5 years.

Dry beans: Dealer prices and grower bids remain in the doldrums for many of the major bean classes, spurring the move to alternative crop acreage this year. The U.S. aggregate grower price for all dry beans averaged 24 percent below a year earlier during the first 7 months of the marketing year (September 2002-March 2003).

Watermelon: Watermelon is the leading U.S. melon crop in terms of planted area (176,827 acres in 2000-02), production, and per capita consumption. During 2000-02, the farm value of watermelon production averaged \$282 million—up 19 percent from a decade earlier. Per capita consumption is forecast to total 14.8 pounds in 2003, about the same as the average of the 1990s (14.7 pounds).

Table 1--U.S. vegetable industry: Area, production, value, unit value, and trade, 2001-03 1/

Item	Unit	2001	2002	2003
Area harvested	1,000 ac.	6,336	6,865	6,567
Vegetables				
Fresh & melons	1,000 ac.	2,038	1,934	1,943
Processing	1,000 ac.	1,334	1,349	1,340
Potatoes	1,000 ac.	1,222	1,268	1,265
Dry beans	1,000 ac.	1,249	1,727	1,400
Other 2/	1,000 ac.	494	587	620
Production	Mil. cwt	1,262	1,322	1,335
Vegetables				
Fresh & melons	Mil. cwt	472	457	463
Processing	Mil. cwt	302	344	340
Potatoes	Mil. cwt	438	463	475
Dry beans	Mil. cwt	20	30	26
Other 2/	Mil. cwt	30	28	32
Crop value	\$ mil.	14,927	15,550	15,461
Vegetables				
Fresh & melons	\$ mil.	8,967	9,282	9,150
Processing	\$ mil.	1,325	1,404	1,395
Potatoes	\$ mil.	3,058	3,151	3,200
Dry beans	\$ mil.	426	520	500
Other 2/	\$ mil.	1,151	1,193	1,216
Unit value 3/	\$/cwt	11.83	11.76	11.59
Vegetables				
Fresh & melons	\$/cwt	18.99	20.33	19.78
Processing	\$/cwt	4.38	4.08	4.10
Potatoes	\$/cwt	6.99	6.82	6.74
Dry beans	\$/cwt	22.10	17.00	19.61
Other 2/	\$/cwt	38.46	42.69	38.58
Trade				
Imports	\$ mil.	4,544	4,814	4,831
Vegetables				
Fresh & melons	\$ mil.	2,592	2,614	2,725
Processing	\$ mil.	1,020	1,189	1,050
Potatoes	\$ mil.	523	575	630
Dry beans	\$ mil.	51	67	53
Other 4/	\$ mil.	357	369	373
Exports	\$ mil.	3,212	3,274	3,366
Vegetables				
Fresh & melons	\$ mil.	1,183	1,204	1,220
Processing	\$ mil.	815	798	848
Potatoes	\$ mil.	700	723	710
Dry beans	\$ mil.	176	180	189
Other 4/	\$ mil.	338	369	400
Per capita use	Pounds	442	440	447
Vegetables				
Fresh & melons	Pounds	172	170	172
Processing	Pounds	116	119	122
Potatoes	Pounds	138	135	137
Dry beans	Pounds	7	7	7
Other 1/	Pounds	9	9	9

1/ ERS forecasts for 2003. 2/ Other includes sweet potatoes, dry peas, lentils, and mushrooms. 3/ Ratio of total value to total production. 4/ Other includes mushrooms, dry peas, lentils, sweet potatoes, and vegetable seed.

Sources: ERS and National Agricultural Statistics Service, USDA.

Fresh-Market Vegetables

Spring Acreage Down, Prices Remain Low

Including asparagus and onions, selected fresh-market vegetable area for harvest was forecast to decline 1 percent to 309,600 acres this spring season (largely April-June). California, which accounts for 51 percent of spring area, expects to harvest 2 percent fewer acres with the entire reduction due to asparagus (down 15 percent), carrots (8 percent), and tomatoes (5 percent). A mild growing season is expected to boost yields and leave the State's fresh-market shipments at or above year-earlier levels.

In Florida, which harvests 23 percent of spring area, area is expected to rise 4 percent from a year ago, led by bell peppers (up 20 percent), cucumbers (13 percent), and tomatoes (6 percent). The increase in bell pepper area is largely a reaction to strong prices during the last quarter and relatively favorable prices a year ago. Florida's spring tomato acreage is the largest since 1992 and likely reflects renewed market confidence following the December 2, 2002 signing of a new suspension agreement governing imports of fresh tomatoes from Mexico (prevents undercutting of U.S. prices when the market is low).

Onion Acreage Down

As expected, despite a 10 percent cut in plantings, area for harvest of spring onions is expected to decline just

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

Item	2001	2002	2003	Change
				2001-02
				--Acres--
				Percent
Snap beans	23,500	24,000	23,000	-4
Broccoli	33,000	33,500	35,000	4
Cabbage	8,200	7,100	7,200	1
Carrots	20,700	20,100	18,900	-6
Cauliflower	9,000	9,000	9,500	6
Celery	5,300	5,200	5,200	0
Sweet corn	36,100	37,000	38,000	3
Cucumbers	5,200	5,600	5,800	4
Head lettuce	37,700	36,900	36,800	0
Bell pepper	7,200	7,500	8,800	17
Tomatoes	26,700	27,800	28,900	4
Vegetables	212,600	213,700	217,100	2
Cantaloup	31,000	29,800	30,500	2
Honeydew	5,800	5,700	5,700	0
Watermelon	53,900	48,000	42,600	-11
Melons	90,700	83,500	78,800	-6
Total	303,300	297,200	295,900	0

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

Source: National Agricultural Statistics Service, USDA.

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

Item	February	March		Change
	2003	2002	2003	2002-03
--1,000 cwt--				
Percent				
Asparagus	443	517	448	-13
Snap beans	270	411	357	-13
Broccoli	824	782	775	-1
Cabbage	1,215	1,652	1,626	-2
Carrots	831	1,184	981	-17
Cauliflower	397	399	405	2
Celery	1,275	1,485	1,332	-10
Sweet corn	437	589	750	27
Eggplant	187	188	176	-6
Head lettuce	2,887	2,652	3,277	24
Dry onions	3,537	3,754	2,875	-23
Bell pepper	1,184	1,492	1,099	-26
Squash	651	783	714	-9
Tomatoes	3,447	3,710	3,179	-14
Cherry tomato	285	264	291	10
Total	17,142	19,081	17,546	-8

1/ Imports and domestic. Data for 2003 are preliminary.

Source: Market News, Agricultural Marketing Service, USDA.

2 percent as better weather this spring limits acreage losses. Georgia's Vidalia onions came through the winter in good condition, but there are concerns that recent heavy rain may yet lead to occurrences of bacterial diseases similar to those that caused heavy losses last year. Growers are spraying onions and hoping for warm, dry weather. The Texas onion crop is sizing well after a cool fall and a mild winter in the lower Rio Grande Valley. A larger share of this year's Texas crop will be coming from the Winter Garden region of Texas, which begins harvest in May. Good yields are expected from California, which began shipping a bit earlier than usual.

Spring onion growers entered an onion market that experienced surging higher prices since February (March prices were 3.5 times higher than a year earlier) as the storage crop in the Northwest saw a late surge in export demand and imports from Mexico were lower due to rain-slowed crops. Last spring, onion prices averaged 41 percent above the previous year due largely to crop losses in Georgia. Assuming limited losses in Georgia this spring and good yields in other States, onion prices are expected to ease from their March/April highs in the coming months as supplies build, with shipping-point prices forecast to average 10-15 percent below a year earlier during the second quarter (Apr.-June).

Although planted area for summer non-storage onions is expected to rise 1 percent, area for storage onions (marketed into the following spring) is forecast to

decline 3 percent. Storage onion area in California, most of which is earmarked for dehydrated products, is expected to rise 6 percent to 33,500 acres—still well below the 1999 record high of 41,600 acres. Excluding the California processing crop, area for U.S. storage onions is forecast down 7 percent, with concern over water availability in Idaho and Colorado and low prices a concern in all storage regions. Colorado onion growers, under economic pressure from other regions since the mid-1990s, expect to plant the lowest area since 1981.

Winter Prices Down, Spring To Remain Even

This spring, a combination of reduced consumer confidence (which is expected to rebound soon) and strong supplies from California and Florida may keep downward pressure on fresh-market vegetable prices this spring. However, assuming average weather, spring fresh-market vegetable prices are currently expected to average near or below those of a year earlier. Higher prices for asparagus, lettuce, and celery, will be offset by lower prices for crops such as peppers, onions, tomatoes, and broccoli.

This winter, relatively mild weather in growing areas supported production, while above-average snowfall in major population centers tended to slow demand. As a result, first (winter) quarter (Jan.-Mar.) shipping-point prices for fresh-market vegetables averaged 43 percent below a year ago and 13 percent lower than 2 years ago. Lower shipping-point prices also pulled retail prices (excluding potatoes) down 2 percent from a year earlier.

Fresh-market shipments (including imports but excluding melons) averaged 2 percent above a year earlier, despite indications of a drop in March. Shipping-

point prices for head lettuce, which surged a year ago, averaged \$11.07/cwt during the first quarter of 2003—down 79 percent. Prices for broccoli (down 38 percent) and cauliflower (down 34 percent) were also much lower. In contrast, tomato prices, which fell 18 percent last winter, jumped 25 percent during the first quarter of 2003 as the effects of winter cold snaps in Florida slowed shipments.

Fresh Import Volume Up In First 2 Months

During January-February, the volume of fresh-market vegetable imports rose 10 percent from a year earlier. While items such as celery (down 25 percent) and broccoli (down 18 percent) were lower, most other imports, such as asparagus (up 67 percent), exhibited increases. Fresh tomato imports were up 18 percent to 547 million pounds. Tomatoes were largely driven by a 28-percent jump in roma (small plum-shaped) tomatoes. Romas accounted for 34 percent of tomato imports during these 2 months.

Table 5--Selected fresh-market trade volume, Jan. - Feb.

Item	Annual	January - February		Change
	2002	2002	2003	2002-03
	--1,000 cwt--			Percent
Exports, fresh:				
Vegetables	39,322	6,295	6,905	10
Melons	6,283	154	161	5
Potatoes	6,932	419	472	13
Total	52,537	6,868	7,538	10
Imports, fresh:				
Vegetables	65,609	15,414	16,909	10
Melons	19,511	4,921	5,229	6
Potatoes	8,831	1,918	1,951	2
Total	93,952	22,253	24,089	8

Source: Bureau of the Census, U.S. Department of Commerce.

Table 4--U.S. quarterly f.o.b. shipping-point prices, selected vegetables, 2002-2003

Commodity	2002				2003				Change First Q 1/ Percent
	First	Second	Third	Fourth	First	Second *	Third *	Fourth *	
	--- Dollars ---								
Asparagus	166.33	102.17	153.00	--	97.97	121.37	129.77	--	-41.1
Broccoli	44.50	24.40	32.40	27.17	27.77	23.95	28.38	29.73	-37.6
Carrots	20.03	21.30	19.87	18.90	19.13	21.73	15.60	14.87	-4.5
Cauliflower	46.80	28.17	24.37	29.67	30.90	26.57	26.03	31.68	-34.0
Celery	17.70	13.42	11.17	11.33	11.33	16.06	12.40	12.90	-36.0
Sweet corn	24.87	17.43	20.90	17.07	24.63	17.89	19.04	23.08	-1.0
Cucumbers	22.90	18.70	20.30	23.17	27.60	19.33	21.71	18.82	20.5
Lettuce, head	52.23	11.39	13.40	11.70	11.07	14.03	17.47	14.33	-78.8
Onions, dry bulb	8.22	20.50	14.10	10.97	17.50	17.42	13.40	10.45	112.9
Snap beans	51.53	44.97	59.07	60.53	59.77	45.36	57.17	57.24	16.0
Tomatoes, field-grown	35.20	30.23	23.90	39.30	44.13	29.81	28.15	35.43	25.4
All vegetable index 2/	1,389	809	796	780	790	802	821	787	-43.1

-- = not available. * = ERS forecast. 1/ Change for first-quarter 2003 over first-quarter 2002. 2/ Index base is 1910-14=100.

Source: Derived from data published by the National Agricultural Statistics Service, USDA.

Melon Area Up Slightly This Spring

Area for harvest (across comparable States) for the three top melon crops was forecast to increase 1 percent to 78,800 acres this spring (largely Apr.-Jun.). All of the increase is due to a 2-percent gain in cantaloup area (table 6). Watermelon area is projected to decline 1 percent while honeydew area remains unchanged. Although a majority of U.S. melon acreage is harvested during the summer, the spring melon crop accounts for about half of all domestically produced melon shipments.

Florida, which accounts for 29 percent of spring melon area, expects to harvest the same area as a year ago, while Texas (28 percent of spring melon area) is forecast to harvest 3 percent fewer acres. California, like Texas, produces commercial volume of the 3 leading melon crops and expects to harvest 4 percent more area this spring. The South Texas spring melon crop is said to be progressing well. In the northern Peninsula and Panhandle areas of Florida, frost in early April did not impact watermelon as growers had just started spring crop planting in those areas. Melon crops in the desert areas of Arizona and California were reported to be in good condition, with shipments expected to begin a bit earlier than usual due to the mild winter.

F.o.b. shipping-point prices during early April were generally higher for cantaloup and honeydew but were lower for watermelon. Except for watermelon, the price premium was running higher for smaller sizes. The following price comparisons with a year ago were noted in early April:

- Cantaloup from Central America—\$10.25 per 40 lb. carton of 12s, up 86 percent from a year ago;
- Honeydews from Central America—\$5.50 per 30 lb. carton of 6s, up 10 percent;
- Seedless watermelon from Mexico—\$0.17 per pound for a carton of 5 melons, down 19 percent.

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

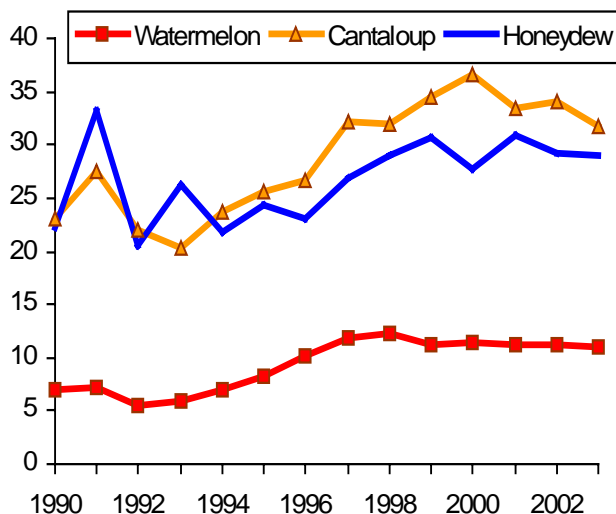
Item	2001	2002	2003	Change
				2002-03
		--Acres--		Percent
Cantaloup	31,000	29,800	30,500	2
Honeydew	5,800	5,700	5,700	0
Watermelon 2/	48,800	42,900	42,600	-1
Total	85,600	78,400	78,800	1

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

2/ Excludes Arizona which was not reported in 2003.

Source: National Agricultural Statistics Service, USDA.

Figure 1
U.S. melons: Import share of consumption
Percent



Source: Economic Research Service, USDA.

During January and February, melon import volume was up 6 percent from a year earlier. These imports were valued at \$58 million--down 11 percent from a year earlier. During these 2 months, cantaloup is the dominant melon imported, accounting for 66 percent of total volume. Costa Rica (43 percent), Honduras (32 percent), and Guatemala (20 percent) were the leading suppliers of cantaloup thus far in 2003.

During 2000-02, 35 percent of U.S. cantaloup consumption came from imports (figure 1). This was up from 24 percent during 1990-92 and is the highest of the three major melons. Honeydew is a close second (29 percent during 2000-02), reflecting the common use of these two melons at breakfast and on restaurant breakfast bars. This has led to significant increases in imports over the past 15 years during the late fall to early spring period (when U.S. production is low or zero).

Per Capita Use Mixed in 2002

U.S. per capita use of melons totaled 27.5 pounds in 2002, down 3 percent from a year earlier. Cantaloup use rose 1 percent to 11.3 pounds per person in 2002—second only to the 1999 record of 11.5 pounds and 29 percent greater than 1990-92. Reflecting reduced production (as growers reacted to a string of low prices during 1999-2001), watermelon use fell 8 percent to 13.9 pounds per person in 2002. Per capita use of honeydew melons rose 11 percent to 2.2 pounds, recovering losses in 2001 caused by lower yields and reduced output.

Processing Vegetables

Canning Area Up, Freezing Down

Contract acreage for the five leading processing vegetables (tomatoes, sweet corn, snap beans, green peas, and cucumbers) is expected to remain about even with a year earlier at 1.28 million acres. Assuming yields remain near the average of the previous 3 seasons, production of the 11 selected processing vegetables could decline 1 percent to 17 million short tons—4 percent above the 2000-02 average.

Canneries, which account for two-thirds of all processing vegetable area, expect to use 1 percent more acreage. With average yields, production of canning vegetables could decline 1 percent in 2003. Area for canning green peas is expected to rise 10 percent. Assuming yields recover from the weather-impacted lows of a year ago, canning pea output could rise 20 to 25 percent. In 2002, canning pea production was the smallest since 1988 and ERS estimates suggest that canned pea stocks are at their lowest level in years.

Contract acreage for sweet corn is expected to fall 1 percent to 438,600 acres (nearly all processing corn is produced under contract). Assuming 2003 yields average around those experienced the past three years, ERS estimates indicate that sweet corn output could total about 3 million short tons. Raw production for the canned market could total about the same as a year earlier (just over 1.4 million tons), while corn used for the frozen pack could come in 3 to 5 percent below a year earlier at nearly 1.6 million tons. If realized, this would be the fourth consecutive annual decline in the

Table 7--Contract plantings of selected processing crops 1/

Year	Contract plantings			Change 2002-03 2/ Percent
	2001	2002	2003 f	
	1000 acres			
Canning	810.2	865.5	873.1	1
Tomatoes	276.7	311.1	312.6	0
Sweet corn	230.9	220.8	222.2	1
Snap beans	134.0	155.5	134.6	-13
Green peas	90.9	98.3	108.1	10
Cucumbers	77.7	79.8	95.6	20
Freezing	426.1	418.3	411.3	-2
Sweet corn	226.8	223.4	216.4	-3
Snap beans	72.1	64.7	59.8	-8
Green peas	127.2	130.2	135.1	4
Processing	1,236.2	1,283.8	1,284.4	0

f = Prospective area..

1/ Excludes open market plantings. 2/ Percent change based on a comparable list of States and not on table data.

Source: National Agricultural Statistics Service, USDA.

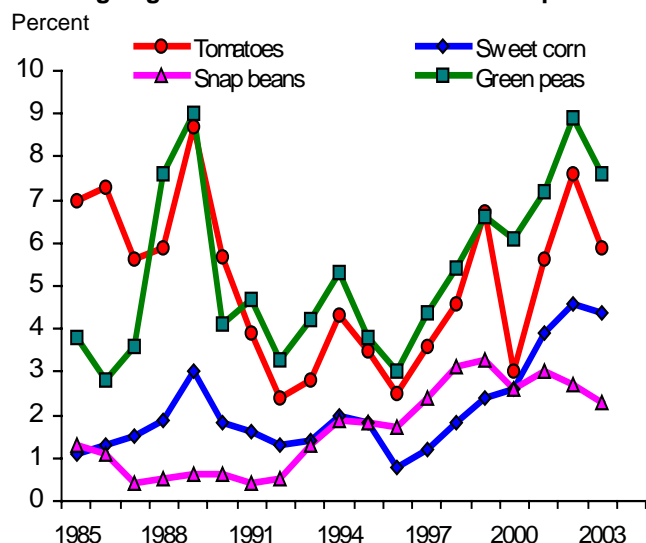
domestic processing sweet corn crop and the smallest output since 1993.

With contract area expected to slightly exceed last year's robust level, tomato processors expect output to again surpass 11 million tons in 2002. Although both export and domestic demand for tomato products appears to have increased over the past year, stocks of many tomato products could become burdensome to the market this fall. As a result, tomato acreage and output may decline in 2004.

Firms producing frozen vegetables contracted for 2 percent fewer acres this spring. Contract area for sweet corn (down 3 percent) and snap beans (down 8 percent) is

Figure 2

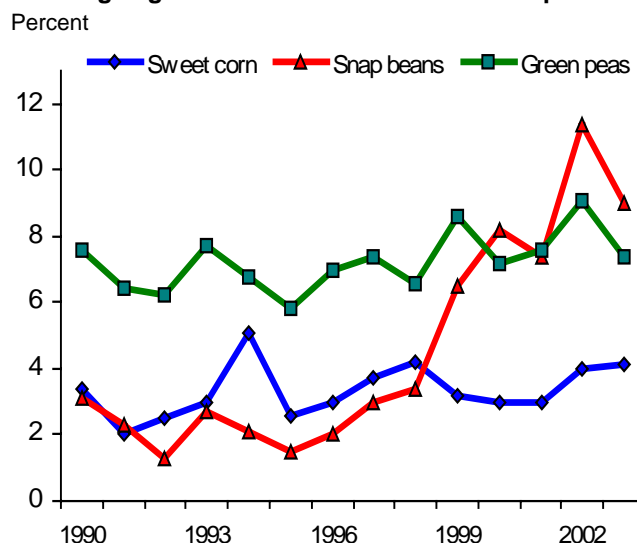
Canning vegetables: Percent of use from imports



Source: Economic Research Service, USDA.

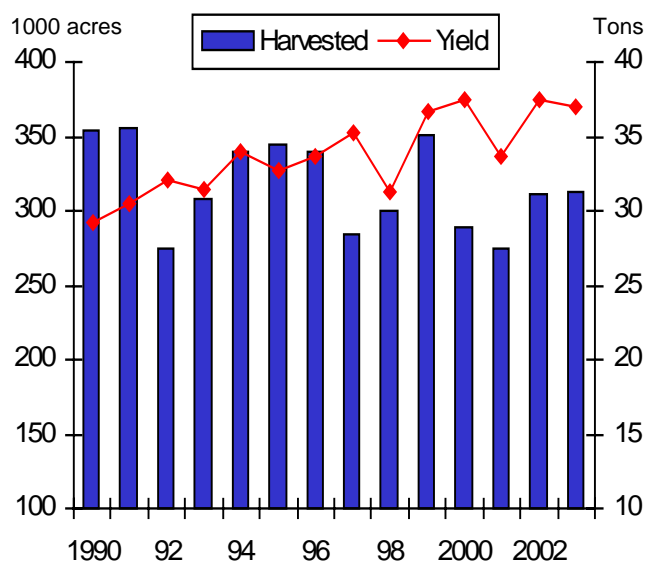
Figure 3

Freezing vegetables: Percent of use from imports



Source: Economic Research Service, USDA.

Figure 4

Processing tomatoes: U.S. harvested area and yield

Source: National Agricultural Statistics Service, USDA.

down while green pea area for freezing is up 4 percent. Given average weather, ERS projections suggest the pack of all frozen vegetables (excluding potatoes) could decline 2 percent in 2003.

Like the canning industry, last year's weather-reduced crop (frost, excess rain) cut harvestable acreage and production. The smaller crop left January 1 frozen green pea stocks at their lowest level since 1988. Assuming better weather this spring, freezing green pea production could rise 15 percent. Based on current usage, ERS estimates suggest an increase in production of about 30 percent would be required to satisfy demand and maintain stocks at their current low levels. Frozen green pea imports have been relatively steady for the past 15 years and are expected to account for about 7 percent of

green pea consumption in 2003.

At the start of 2003, stocks of frozen vegetables (excluding potatoes) were down 3 percent from a year ago. With generally low inventories, wholesale prices for frozen vegetables are running 3 percent above a year earlier.

Processed Imports Up, Exports Down

During the first 2 months of 2003 (January-February), the value of processed (canned, frozen, and dried) vegetable exports (excluding potatoes) declined 5 percent from a year ago to \$124 million. Despite larger exports of tomato products, canned vegetables declined 9 percent to \$78 million. Increased volume pushed the value of frozen exports up 11 percent, while dried and dehydrated vegetable exports declined 7 percent from a year earlier. Processed imports (excluding potatoes) increased 7 percent to \$204 million during the first 2 months of 2003. Increased frozen import volume was noted for snap beans (up 70 percent), green peas (up 25 percent), and sweet corn (up 21 percent).

Table 9--Value of processed vegetable trade 1/

Item	Annual	January - February		Change
	2002	2002	2003	2002-03
--Million dollars--				Percent
Imports:				
Canned	606	94	94	0
Frozen	347	62	72	17
Dehydrated 2/	236	36	38	7
Exports:				
Canned	512	85	78	-9
Frozen	160	25	28	11
Dehydrated 2/	126	20	19	-7

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

Source: Bureau of the Census, U.S. Department of Commerce.

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

Item	March	Feb.	March	Change previous:		Oct.-Dec.	Jan.-Mar.	Change previous:		
	2003	2003	2002	Month	Year	2002	2002	2003	Quarter	Year
	Index			Percent		Index			Percent	
Consumer Price Indexes (12/97=100)										
Processed fruit and vegetables	114	114	112	-0.1	1.9	113	112	113	0.4	0.9
Canned vegetables	116	115	114	0.8	1.7	115	115	115	0.3	-0.1
Frozen vegetables (1982-84=100)	171	171	169	-0.2	1.1	170	171	170	0.2	-0.7
Dry beans, peas, lentils	109	109	108	-0.2	1.3	111	105	109	-1.4	4.1
Olives, pickles, relishes	113	104	112	8.7	1.2	111	112	107	-3.0	-4.0
Producer Price Indexes (90-92=100)										
Canned vegetables and juices	129	129	128	-0.5	0.6	129	128	129	-0.2	0.6
Pickles and products	180	180	179	0.0	0.6	180	179	180	0.0	0.7
Tomato catsup and sauces	123	124	119	-0.6	2.9	123	119	123	0.2	3.0
Canned dry beans	124	124	123	0.0	0.2	123	124	123	0.0	0.0
Vegetable juices	109	111	110	-1.5	-1.1	111	110	110	-0.5	-0.1
Frozen vegetables	133	134	130	-0.7	2.3	132	130	134	1.1	2.5
Dried/dehydrated vegetables	169	176	187	-4.0	-9.7	183	184	174	-4.8	-5.5

Source: Bureau of Labor Statistics, U.S. Department of Labor.

Winter and Spring Production Down Slightly

The 2003 winter-season potato crop is estimated at 4.2 million cwt, down 1 percent from a year ago but 1 percent above 2001. Harvested acreage in the two winter potato States (California and Florida) is estimated at 14,800, down 6 percent from 2002, while the average yield is forecast at 281 cwt per acre, up 5 percent from last year. California winter harvest made normal progress with no weather- or pest-related setbacks, while Florida experienced reduced acreage and yields due to heavy March rains.

Spring potato production for 2003 is forecast at 23.7 million cwt, up 2 percent from last year. Area for harvest is estimated at 83,800 acres, down 3 percent from last year but 10 percent above 2001. Per acre yields are forecast to average 282 cwt, up 4 percent from a year ago. Florida production is forecast down 1 percent from last year, with acreage higher but yields expected to be lower due to the March rains. Harvest should begin there in late April or early May. Production is also expected to be lower in North Carolina this spring (down 21 percent from a year ago), but should be up from last spring in all other spring-producing States: Arizona (up 6 percent), California (up 1 percent), and Texas (up 47 percent).

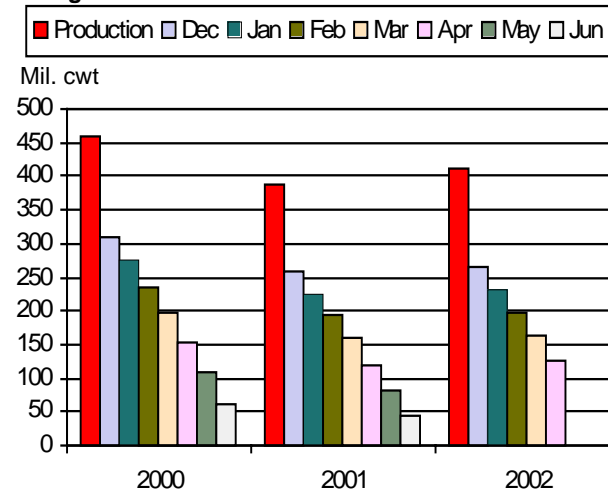
Fresh Potato Stocks Up, Frozen Down

On April 1, the 15 major potato States held 125 million cwt of stored potatoes, up 4 percent from last year, but 19 percent below the record levels of 2001. April 1 stocks represented 30 percent of fall production in the storage States, just 1 percent below a year ago. Despite increased disappearance of potatoes from the 2002 crop to date (286 million cwt as of April 1—up 7 percent from a year ago), fresh stocks have been higher than year-previous levels throughout the marketing season as a result of a 6 percent increase in production last fall.

It appears that slightly fewer potatoes are going to the fresh market this season as shipments of table potatoes are down less than 1 percent from year-previous levels for September through March. However, processor use of potatoes is up 10 percent through March compared with a year ago, but is 4 percent below the record usage rate for the 2000 crop. Changes in stocks of frozen potato products this marketing season reflect the increased processor use of potatoes. At the end of August 2002, stocks of all frozen potato products were 13 percent below year-earlier levels. By the end of February, 2003, frozen

Figure 5

Fall Potatoes: Production and stocks for 15 storage States 1/



1/ Production by crop year, stocks by months following harvest.

Source: National Agricultural Statistics Service, USDA.

stocks were within 5 percent of year-previous levels. Stocks of frozen french fries were 8 percent below a year ago at the end of February, while stocks of other frozen potato products were up 8 percent.

While the overall increased disappearance of potatoes and increased use of potatoes by processors at first may seem to indicate a strengthening overall demand, further examination of the data reveal this may not be the case. Much of the overall increased processor usage occurred early in the season, when frozen stocks were at extremely low levels and processors were in need of raw product to rebuild depleted inventories resulting from the small 2001 crop. Early season processor usage (roughly September through November) in the nine major processing States was 18 percent above the same period in 2001, and frozen stocks improved from 13 percent below year-previous levels to 6 percent below during this time.

Between December 1, 2002 and March 1, 2003, processing use was actually 1 percent below the same period a year ago, with overall frozen stocks staying about the same or even improving slightly relative to year-previous levels. February and March processing usage (up 4 percent from a year ago) may indicate a revival in demand. However, it will be important to monitor changes in fresh and frozen stocks relative to processing usage during the remainder of the marketing year as this will be a key factor in determining overall demand going into the fall harvest.

U.S. exports of frozen french fries may also indicate rather stagnant foreign demand for U.S. fries. During the September 2002 through February 2003 period, fry exports were down 13 percent from a year ago, and 18 percent below 2 years ago. While U.S. exports of fries decreased, imports of fries continue to increase, rising 4 percent above year-previous levels for September through February. With yet another new processing plant set to swing into production this year in Canada, the U.S. will likely be a net importer of fries for the third consecutive year in 2003.

Grower Prices Down in 2002/03

A 6 percent increase in U.S. potato production last fall, combined with a 15 percent increase in Canadian production has put downward pressure on grower prices this season. At the same time, demand for fresh-market potatoes has been weaker than a year ago. As a result, U.S. grower prices for potatoes during September through March averaged 3 percent below year-earlier levels. Over this same period, fresh-market prices were down 5 percent from year-earlier levels. However, unlike last season when prices for fresh potatoes rose steadily into early summer, this year fresh prices have declined steadily since November. February fresh-market grower prices were 27 percent below a year ago. The Producer Price Index (PPI) for fresh consumer use potatoes showed a 30 percent decrease for September through March. Grower prices for processing potatoes, conversely, have averaged slightly higher than a year ago—up 3 percent for September through February. This increase is due primarily to strong processor demand in the last quarter of 2002, as processors needed to replenish frozen stocks that had dwindled to relatively low levels. The higher grower prices for

processing potatoes is also reflected in a higher PPI for frozen french fries, which is up 3 percent from last year (September through March).

Despite the decline in fresh market grower prices this year, retail prices for fresh potatoes have actually averaged 13 percent higher than year-previous during September through March, and the CPI for fresh potatoes has averaged 6 percent higher. The average price for frozen french fries, however, was actually down slightly (1 percent) from September through March, while the price of potato chips was up slightly (1 percent). Retail prices for fresh potatoes generally fluctuate more year to year than do the processed potato products, but it is also interesting to note that fresh retail prices have increased at a faster rate than either fries or chips over the last 20 years. Calendar year monthly average prices for fresh potatoes have increased by an average of 5 percent a year since 1980, while fries have increased an average of 4 percent, and chips 2 percent. Average fresh retail prices for the first 3 years of the 2000s were 94 percent higher than they were for the first 3 years of the 1980s. During this time frame, french fry and potato chip retail prices rose 79 and 51 percent, respectively.

Prices at the grower level will likely remain at or lower than a year ago for the remainder of the 2002/03 marketing season. Processor demand appears to have leveled early in 2003, and prices for processing potatoes were at near year-previous levels in January and February. Fresh-market prices are moving in the opposite direction from a year ago and with more stocks on hand than last season, the price gap between this year and last may widen through the summer months. The 2002 season-average price will

Table 10--Potatoes: Processing use through December 1, monthly and seasonal totals, major States, 1991/92-2002/03

Season	Processed through December 1	Potatoes processed during:					Entire season	
		December	January	February	March	April		Others
--1,000 cwt--								
1991/92	58,855	12,425	14,370	15,445	15,870	15,310	41,825	174,100
1992/93	57,355	14,125	13,650	15,365	15,065	14,735	43,910	174,205
1993/94	61,305	13,820	14,850	15,990	17,365	17,270	46,115	186,715
1994/95	65,580	16,040	16,700	17,275	18,160	18,390	51,965	204,110
1995/96	71,415	16,275	16,275	17,680	18,090	16,890	42,180	198,805
1996/97	78,240	15,745	16,600	20,160	18,865	18,680	59,245	227,535
1997/98	68,355	15,265	15,500	19,390	19,700	17,585	56,297	212,092
1998/99	74,140	15,850	18,890	19,455	21,080	18,685	54,300	222,400
1999/2000	75,015	15,830	15,780	19,870	20,475	18,120	48,940	214,030
2000/01	78,570	16,810	17,890	18,350	19,785	18,660	60,560	230,625
2001/02	65,505	14,900	15,925	18,395	17,105	16,550	45,685	194,065
2002/03	77,610	15,180	14,860	18,840	18,150	--	--	--

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

Source: National Agricultural Statistics Service, USDA.

definitely be lower than the average for the 2001 crop (\$6.99/cwt), and barring a sudden improvement in apparent demand for the rest of the season, the 2002 crop average price could potentially fall below \$6.60/cwt.

Lower Prices May Prompt Reduced Fall Area

Lower grower prices and higher stocks on hand in the spring typically signal a decrease in fall potato acreage. Other factors that signal a decline are relatively weak demand for fresh potatoes compared to a year ago, some water availability concerns in various areas of the West, and a fry plant closure in Idaho with another new plant opening in Canada this year. However, other factors seem to cloud the acreage situation somewhat, perhaps signaling acreage might not decline as much as current prices and demand indicate. For example, the outlook for several competing crops in various States sends mixed signals. Wheat acreage is expected to be up 2 percent nationwide, and up in several key fall potato-producing States (Colorado—up 11 percent, Idaho—up 2 percent, Oregon—up 15 percent, Washington—up 1 percent, and Wisconsin—up 7 percent).

Conversely, acreage for crops like sugarbeets and dry beans are expected to be down at the national level (2 and 21 percent respectively), varying by State. Also putting some question into acreage decrease is the current overall level of grower prices. Although down from a year ago, prices so far this year are the second-highest they have been since the 1995 crop,

with potatoes likely being a profitable crop for most growers for the past two seasons. Based on an overall assessment of current market conditions, ERS forecasts planted acreage for 2003 fall-season potatoes to decline by less than 1 percent from a year ago. Although current demand seems sluggish and prices are down from a year ago, prices have still been primarily at profitable levels thus far this marketing season and there is no clear indication that growers will shift large amounts of acreage to alternative crops.

Furthermore, early season shipments of seed potatoes (September through March) are up 27 percent from year-previous levels. However, April and May are traditionally the largest seed-shipment months, and should provide a better indication of grower intentions. If planted acreage does decline by one percent or less, and is combined with average acreage abandonment and average yields, fall-season production would rise to over 427 million cwt—up more than 2 percent from a year ago. However, a small decrease in acreage combined with record yields like those realized in 2000 could push fall production to near the 445 million cwt level—up 7 percent from last fall. Either scenario is likely to put downward pressure on prices in the next marketing season if demand does not increase from current levels. Larger acreage decreases would help the price outlook in the coming season. USDA's first official estimate of planted acreage for fall potatoes will be released on July 11.

Table 11--Potatoes: Monthly average grower prices

Year	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
	\$/cwt											
All potatoes:												
1999/2000	5.09	4.86	5.52	5.44	5.67	5.91	6.26	6.54	6.30	6.17	6.95	5.53
2000/01	4.65	4.30	4.31	4.59	4.73	5.28	5.12	5.47	5.22	5.71	6.37	7.61
2001/02	6.04	5.15	5.96	6.66	7.34	7.34	8.26	8.00	8.62	9.39	10.40	8.00
2002/03	6.26	5.50	6.43	6.60	6.67	6.55	6.87					
Tablestock:												
1999/2000	6.94	6.00	6.57	6.22	6.32	6.71	6.77	7.17	7.18	7.45	9.36	8.49
2000/01	4.92	4.04	3.80	4.00	4.38	5.41	4.50	5.50	7.23	8.36	8.94	13.50
2001/02	10.20	8.13	8.28	9.22	10.50	11.60	13.20	12.10	14.80	15.80	16.60	15.30
2002/03	10.80	8.34	8.82	8.47	8.40	8.36						
Processing:												
1999/2000	4.61	4.64	4.97	4.86	5.24	5.31	5.26	5.42	5.39	5.32	4.92	4.58
2000/01	4.40	4.30	4.67	4.85	4.95	5.15	5.10	5.19	5.09	4.96	5.24	4.73
2001/02	4.58	4.42	4.77	5.04	5.38	5.28	5.35	5.70	6.01	5.93	5.90	4.91
2002/03	4.56	4.74	5.08	5.31	5.46	5.37						

Source: National Agricultural Statistics Service, USDA.

Sweet Potatoes

Prospective Area Down 4 Percent

U.S. sweet potato growers intend to plant 93,500 acres in 2003, down 4 percent from last year and 5 percent below 2001 for comparable States. Six States expect lower acreage (California, Louisiana, Mississippi, New Jersey, South Carolina, and Texas), two are unchanged (Alabama and Virginia), but North Carolina (the largest sweet potato producer) expects a 5-percent increase in acreage. The overall decline comes despite strong grower prices at the national level for the 2002 crop. The preliminary season-average price for 2002-crop sweet potatoes is \$17.00/cwt, up 10 percent from the 2001 crop—largely the result of a 15-percent decline in production last fall.

The most significant acreage declines this year are expected in Louisiana (down 3,000 acres), and Mississippi (down 2,000 acres). Heavy rains from Tropical Storm Isadore and Hurricane Lili in late September and early October, and further heavy rains in October and November damaged crops and reduced yields in Louisiana last fall. Some areas in Mississippi also reported extensive losses, although the State's overall yield was not affected as it was in Louisiana. Grower prices in both States rose by less than the national average last year (up less than 2 percent in Louisiana and 7 percent in Mississippi), so overall sweet potato revenue was down in both States. Some Louisiana growers are eligible to apply for Federal disaster loans through USDA's Emergency Loan Program. Nevertheless, after 2 years of drought followed by 2 years of excessive rains and hurricane damage, many Louisiana growers have opted to reduce plantings this year.

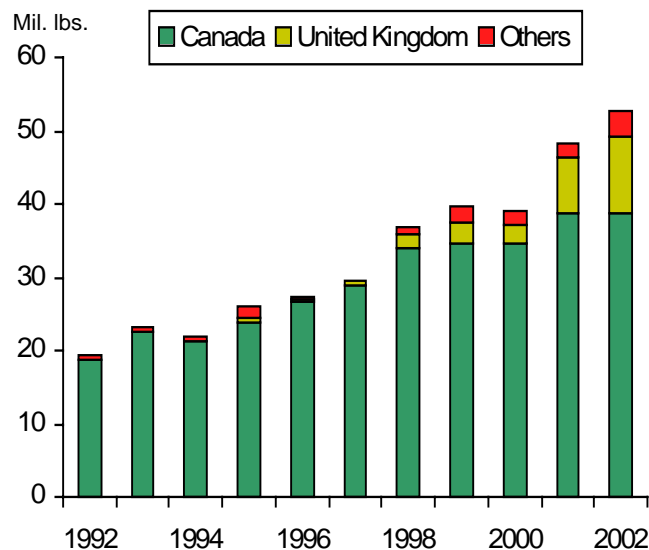
Barring any weather-related disasters again this season, and a return to average acreage abandonment and relatively good yields (160 cwt/acre), the 2003 U.S. sweet potato crop could reach 14.3 million cwt. That would be up 15 percent from a year ago, and 9 percent above the average of the last 5 years. Grower prices

Table 12--Sweet potatoes: Acres planted

State	2001	2002	2003	Change 2002-03 Percent
		--1,000 cwt--		
Alabama	3.0	2.9	2.9	0
California	10.0	10.4	10.1	-3
Louisiana	24.0	21.0	18.0	-14
Mississippi	16.7	16.0	14.0	-13
North Carolina	37.0	40.0	42.0	5
Texas	4.2	3.5	3.4	-3
Others	4.2	3.4	3.1	-9
Total	99.1	97.2	93.5	-4

Source: National Agricultural Statistics Service, USDA.

Figure 6
U.S. sweet potato export volume, selected countries



Source: Bureau of the Census, USDC.

would likely fall, but with steady domestic demand and strong export demand expected, the season-average price could still average more than \$15.50 per cwt. However, if sweet potato yields maintain the recent 3-year average (150 cwt/acre), production could total around 13.4 million cwt, up 7 percent from a year ago and 2 percent above the recent 5-year average. If quality is excellent and demand strong, production at that level could keep prices near the \$17.00 per cwt average received for the 2002 crop. Average sweet potato grower prices have clearly improved over the last 10 to 15 years, rising from an average of \$12.92/cwt during 1988-1992, to \$15.04/cwt during 1993-1997, to \$16.12 from 1998-2002. The increases can likely be attributed to strong domestic demand, increasing export demand, improved product quality, and a longer marketing season due to improved varieties, storage facilities, and curing techniques.

Since 1990, U.S. exports of sweet potatoes (excluding canned) have risen an average of 11 percent annually. Canada has traditionally been, and still is, the largest export market for U.S. sweet potatoes, accounting for 75 percent of exports in 2002. However, this share is down from a peak of 98 percent in 1996—a sign that U.S. sweet potatoes are finding their way onto more tables around the world. The foreign market showing the most significant growth for U.S. sweet potatoes since the mid-1990s has been the United Kingdom. Exports to the U.K., which accounted for less than 1 percent of total U.S. sweet potato exports in the early 1990s and less than 2 percent as recently as 1997, have grown tremendously in the last few years, and accounted for nearly 21 percent of the total in 2002.

Prospective Acreage Down 21 Percent

U.S. growers have indicated they intend to plant fewer dry beans in 2003—acreage is expected to decline 21 percent to 1.52 million. This drop is in response to weak grower prices stemming from last year's large crop and stagnant domestic and export demand. Since planting does not finish until June in some areas, further adjustments to indicated acreage will likely take place. A year ago, for example, growers ended up planting 9 percent more area than they initially indicated in March. The next acreage estimate for dry beans will be released in the June 30 *Acreage* report.

In the late-March *Prospective Plantings* report, a few indicated area intentions were as follows:

- *North Dakota*, the leading producer of all beans including pinto and navy, indicated a 24-percent drop;
- *Michigan*, the top source for black beans but where the dry bean industry is under considerable economic pressure, plans to cut area 44 percent;
- *Minnesota*, a diverse producer and leading source of dark red kidney beans, plans an 18-percent decline;
- *Colorado*, which lost 24 percent of planted dry bean area to drought last year, indicated an 8-percent decline in dry bean area for 2003;
- *California*, experiencing soft demand for limas and losing market share for other bean classes, expects to plant 13-percent fewer acres—the lowest area since records began in 1909;
- *Nebraska*, the leading source of Great Northern beans, indicated a 14-percent cut in 2003. There is some speculation that food aid demand for Iraq could increase Great Northern exports over the next year.

Before the August 1990 economic embargo, Iraq was the dominant foreign market for U.S. Great Northern beans, accounting for 20 to 25 percent of exports (sales

Table 13--Dry edible beans: Area planted 1/

Item	2001	2002	2003 2/	Change
				2002-03
	--Acres--			Percent
California	88.0	92.0	80.0	-13
Colorado	115.0	92.0	85.0	-8
Idaho	75.0	95.0	100.0	5
Michigan	215.0	270.0	150.0	-44
Minnesota	115.0	170.0	140.0	-18
Montana	43.5	26.9	25.0	-7
Nebraska	160.0	185.0	160.0	-14
New York	23.0	25.0	30.0	20
North Dakota	440.0	790.0	600.0	-24
Texas	30.0	37.5	33.0	-12
Washington	34.0	41.0	25.0	-39
Wyoming	27.0	32.0	32.0	0
Others	70.4	65.7	62.8	-4
U.S.	1,435.9	1,922.1	1,522.8	-21

1/ Excludes garden seed. 2/ Prospective plantings.

Source: National Agricultural Statistics Service, USDA.

Table 14--U.S. Great Northerns: Export share of supply

Item	Production	Supply 2/	Percent of	
			Exports	supply exported
	-- Mil. lbs --		Percent	
1985-89	233.2	331.0	133.6	40.4
1990	282.2	343.7	140.8	41.0
1991	258.8	363.6	93.4	25.7
1992	141.6	281.4	50.7	18.0
1993	86.8	188.5	33.9	18.0
1994	162.4	203.3	64.9	31.9
1995	214.2	248.1	64.2	25.9
1996	223.9	300.0	62.8	20.9
1997	225.1	323.2	102.2	31.6
1998	217.3	328.8	123.5	37.6
1999	246.9	342.7	68.3	19.9
2000	248.9	395.6	103.3	26.1
2001	210.8	372.0	104.5	28.1
2002	154.5	293.6	82.8	28.2

1/ Calendar year data. 2/ Production, imports, beginning stocks.

Source: Economic Research Service, USDA.

to Iraq were largely financed under the GSM-102 export credits program). After 1990, U.S. firms expanded markets in places such as Europe and Japan to help replace some of the lost Iraqi volume. However, U.S. Great Northern production and exports have continued to lag behind pre-1991 levels. With increasingly unfavorable exchange rates also in play, about 26 percent of U.S. Great Northern supplies were exported from 1991-2000, compared with 39 percent during 1981-1990. Regaining the Iraqi market could provide a needed boost to the Great Northern market.

Assuming average weather this summer and fall and sufficient irrigation water in arid mountain States, yields could hover around the 30-year trend (17.1 cwt/acre). Trend yields together with a reduction in acreage abandonment (it was the third highest since 1946 last year) could place U.S. dry bean production between 24 and 25 million cwt in 2003.

Grower Prices Down 24 Percent

Dealer prices and grower bids remain in the doldrums for many of the major bean classes, spurring the expected move to alternative crops this year. The U.S. aggregate grower price for all dry beans averaged 24 percent below a year earlier during the first 7 months of the marketing year (September 2002 - March 2003). During this time, grower bids for several of the major classes changed as follows;

- Pintos, \$13.75—down 44 percent from last year;
- Navy, \$11.42—down 48 percent;
- Great Northern, \$18.39—up 13 percent;
- Black, \$11.93—down 62 percent;
- Light red kidney, \$21.75—down 14 percent;
- Blackeye, \$31.97—up 18 percent;
- Small red, \$19.95—down 12 percent.

Commodity Highlight: Watermelon

Cultivated for thousands of years, watermelon is thought to have originated in Africa and made its way to America with African slaves and European colonists. With a 2-percent share, the United States currently ranks fourth in worldwide watermelon production—averaging 39.2 million cwt in 2000-02. Grown in most States, about three-fourths of U.S. production during 2000-02 originated from Florida (20 percent), Texas (17 percent), California (16 percent), Georgia (13 percent), and Arizona (7 percent).

Watermelon is the leading U.S. melon crop in terms of planted area (176,827 acres in 2000-02), production, and per capita consumption. Because of higher unit values, cantaloup is the leading melon in terms of crop value. During 2000-02, the farm value of watermelon production averaged \$282 million—up 19 percent from a decade earlier.

Although value and production have been rising, the acreage devoted to watermelon has been trending lower over the past few decades. During the most recent decade, declining acreage has likely been a combination of rising per acre yields and successive years of freeze damages in Florida and drought in Texas. Increased watermelon yields reflect improved varieties and a larger proportion of acreage covered by irrigation, especially in States like Texas. In addition, seedless varieties now account for a substantial portion of the watermelon crop. With much higher seed costs and more challenging cultural requirements, seedless melons tend to be more intensively managed—resulting in less crop abandonment and higher yields.

Most watermelon is consumed fresh, although there are several processed products in the market such as roasted seeds, pickled rind, and watermelon juice for which no data are currently available.

Per capita watermelon use began trending higher after bottoming out in 1980 at a record low 10.7 pounds (use data begin with 1919). Domestic use of watermelon

surged heading into the 1990s, with annual consumption that decade averaging 14.7 pounds per capita—up 16 percent from 12.7 pounds during the 1980s. The increase in the 1990s was likely the result of better marketing (e.g. more pre-cut and wrapped product), increased promotion efforts, new smaller varieties better suited to shrinking American household size, surging popularity of seedless melons, and a strong national economy featuring high employment levels. Some of the increase may also be due to rising public awareness of the impact on overall health of including fruits and vegetables in the diet.

In the new millennium, watermelon consumption has since leveled off and declined about 1 pound/person since the most recent peak in 1998 (use is forecast to total 14.8 pounds per person in 2003). Although there could be several reasons for this decline, one plausible explanation may involve changes in the type of watermelon demanded—namely smaller “icebox melons”, including smaller seedless types that have become very popular since the early 1990s. Per capita use is a weight-based volume measure, which may be accurately reflecting declining average melon weight. At the same time, per capita use can not reflect possible increases in eating occasions of smaller individual melons and pre-wrapped melon quarters. Because of thinner rinds and less waste, the increased marketing of new mini “personal” seedless watermelons could eventually result in declining per capita use, even as the number of eating occasions rises.

According to a USDA food consumption survey, the bulk (85 percent) of watermelon are purchased at retail stores and considered as home foods. The institutional market (community feeding centers, daycare facilities, etc.) was the strongest among the various away-from-home markets. Watermelon is heavily favored in the West and consumed about in proportion to population share in the Midwest and East. Per capita use is weakest in the South. (follow this [link](#) to a 2001 ERS article describing watermelon consumption).

Table 15--U.S. watermelon: Supply, utilization, and price

Year	Supply			Utilization			Season-average price		
	Production 1/	Imports 2/	Total	Exports 2/	Domestic	Per capita use	Current dollars 1/	Constant dollars 3/	
	-- Million pounds --						Pounds	-- \$/cwt --	
1980	2,271.6	205.7	2,477.3	51.9	2,425.4	10.65	6.59	11.48	
1990	3,187.1	228.6	3,415.7	94.4	3,321.3	13.28	6.66	7.70	
1998	3,697.4	484.2	4,181.6	244.8	3,936.8	14.26	7.71	7.47	
1999	4,115.3	481.6	4,596.9	292.2	4,304.7	15.41	6.47	6.18	
2000	3,762.9	446.0	4,208.9	293.3	3,915.6	13.87	6.41	6.00	
2001	4,064.8	483.5	4,548.3	249.7	4,298.6	15.08	6.77	6.19	
2002	3,920.4	451.4	4,371.8	364.5	4,007.3	13.93	8.38	7.57	
2003 f	4,125.0	475.0	4,600.0	300.0	4,300.0	14.85	--	--	

-- = Not available. f = ERS forecast. 1/ Source: National Agricultural Statistics Service, USDA. Production data were adjusted by ERS for 1970-81 to account for States not included in NASS estimates. 2/ Source: Bureau of the Census, U.S. Department of Commerce. From 1978-89, exports adjusted by ERS using Canadian import data. 3/ Constant-dollar prices calculated using GDP deflator, 1996=100.

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. Factors Affecting U.S. Mushroom Consumption

<http://www.ers.usda.gov/publications/VGS/mar03/vgs29501/>

Examines the consumption distribution of fresh-market and processed mushrooms in the United States. The analysis indicates that per capita mushroom use is greatest in the West and Midwest. A little more than half of fresh-market mushrooms are purchased at retail and consumed at home, while three-fourths of processed mushrooms are consumed at home.

2. Sweet Potatoes: Getting to the Root of Demand

<http://www.ers.usda.gov/publications/agoutlook/Nov2002/ao296e.pdf>

Analyzes supply and demand trends in the U.S. sweet potato market. Per capita use of sweet potatoes, which peaked in 1920 at 29.5 pounds, has ceased declining—stabilizing at about 4.1 pounds over the past 15 years. Sweet potatoes are most popular in the South, where per capita use was estimated to 5.7 pounds in 2001—more than twice that of the West (2.6 pounds), which consumes the fewest sweet potatoes.

3. Trade Issues Facing U.S. Horticulture in the WTO Negotiations

<http://www.ers.usda.gov/publications/vgs/aug01/vgs285-01/>

U.S. objectives for the upcoming World Trade Organization negotiations are discussed, including reducing tariffs and improving market access, eliminating and prohibiting the use of export subsidies, and placing further limitations on trade-distorting domestic support programs. Phytosanitary and food safety protocol are also covered.

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 97 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. 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>

3. 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>

4. 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>

5. 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>

6. 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>

7. 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>

The U.S. Department of Agriculture (USDA) prohibits discrimination in all its programs and activities on the basis of race, color, national origin, sex, religion, age, disability, political beliefs, sexual orientation, or marital or family status. (Not all prohibited bases apply to all programs.) Persons with disabilities who require alternative means for communication of program information (Braille, large print, audiotape, etc.) should contact USDA's TARGET Center at (202) 720-2600 (voice and TDD).

To file a complaint of discrimination, write USDA, Director, Office of Civil Rights, Room 326-W, Whitten Building, 14th and Independence Avenue, SW, Washington, DC 20250-9410 or call (202) 720-5964 (voice and TDD). USDA is an equal opportunity provider and employer.

Data Tables (continued)

8. 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>

9. 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>

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

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

Vegetables and Melons: ERS' Vegetables and Melons Briefing Room contains special articles, data, and links. <http://www.ers.usda.gov/briefing/vegetables/>.

Potatoes: ERS' Potato Briefing Room contains special articles, data, and links. <http://www.ers.usda.gov/briefing/potatoes/>.

Tomatoes: ERS' Tomato Briefing Room contains special articles, data, and links. <http://www.ers.usda.gov/briefing/tomatoes/>.

Dry Beans: ERS' Dry Bean Briefing Room contains special articles, data, and links. <http://www.ers.usda.gov/briefing/drybeans/>.

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>

NASS Vegetables: USDA, National Agricultural Statistics Service's annual & quarterly reports on vegetables & melons. <http://usda.mannlib.cornell.edu/reports/nassr/fruit/pvg-bb/>

FAS, HTP: USDA, Foreign Agricultural Service's Horticultural and Tropical Products web site. <http://www.fas.usda.gov/http/default.htm>

ERS Farm Bill Web Site: USDA, ERS site which lays out the 2002 farm bill provisions and economic implications. <http://www.ers.usda.gov/Features/FarmBill/>

Contact Information

Gary Lucier
Tel: (202) 694-5253
Fax: (202) 694-5820
Glucier@ers.usda.gov

Charles Plummer
Tel: (202) 694-5256
Cplummer@ers.usda.gov
Potatoes, sweet potatoes, long-run outlook

Subscription Information

Subscribe to ERS' e-mail notification service at <http://www.ers.usda.gov/updates/> to receive timely notification of newsletter availability. Printed copies may be purchased from the USDA Order Desk by calling 1-800-999-6779 (specify the issue number or series SUB-VGS-4039).

Price table 1--Commercial vegetables and potatoes: Indexes of prices received by U.S. growers, by month, 1995-2003 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	655	573	719	906	872	783	795	861	955	834	962	766	807
	2001	819	968	928	920	968	805	834	967	900	702	679	641	844
	2002	1,085	1,279	1,813	832	826	768	784	803	800	741	804	796	944
	2003	766	751	853										
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	593	666	736	747	879	842	884	658	551	476	517	553	675
	2003	549	561	571										
--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	108	136	131	117	119	129	143	125	144	115	121
	2001	123	145	139	138	145	120	125	145	135	105	102	96	126
	2002	162	191	271	124	124	115	117	120	120	111	120	119	141
	2003	115	112	128										
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	117	132	145	148	174	166	175	130	109	94	102	109	134
	2003	108	111	113										

1/ Prices for 2003 are preliminary. 2/ Includes fresh and processing vegetables. 3/ Includes fresh potatoes and dry edible beans.

Source: National Agricultural Statistics Service, USDA.

Price table 3--Vegetables: Producer Price Indexes, by month, 1996-2003 1/

Item	Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Annual
--1982=100--														
Fresh 2/	1996	133.9	119.4	202.5	155.6	108.2	96.6	108.8	97.2	91.3	106.0	131.5	99.3	120.9
	1997	105.2	126.2	150.4	109.6	103.2	112.2	115.7	125.2	121.8	143.1	124.7	118.5	121.3
	1998	133.1	136.6	148.2	162.9	123.2	106.5	153.7	114.9	135.0	161.9	131.2	148.1	137.9
	1999	131.9	93.1	117.4	144.4	111.3	125.8	103.4	113.7	117.5	101.6	100.9	151.6	117.7
	2000	111.3	100.5	122.3	126.8	152.0	128.1	127.2	136.7	155.9	165.0	173.9	120.3	135.0
	2001	147.0	168.6	178.7	145.6	144.9	129.4	109.7	127.2	132.3	112.3	105.9	121.0	135.2
	2002	146.1	188.7	242.5	101.7	107.2	123.2	127.1	125.4	116.7	126.9	127.4	119.0	137.7
2003	147.8	127.5	153.0											
Canned 3/	1996	120.4	119.8	120.4	120.4	120.8	121.0	122.6	122.1	121.9	121.8	121.9	121.8	121.2
	1997	121.5	121.1	120.5	120.1	119.8	119.9	119.1	119.3	119.3	120.2	120.3	120.7	120.2
	1998	121.2	121.9	121.8	121.8	121.9	121.9	122.0	122.0	120.0	119.6	120.0	120.0	121.2
	1999	120.6	120.6	120.9	120.9	121.0	121.0	120.8	120.9	120.7	120.7	121.3	121.3	120.9
	2000	121.3	120.8	121.2	120.9	121.2	121.5	121.1	120.9	121.1	121.6	121.7	121.3	121.2
	2001	121.4	121.4	121.3	121.3	121.4	121.9	124.1	124.9	125.3	126.5	128.0	128.1	123.8
	2002	128.3	128.2	128.0	128.2	128.3	128.0	127.7	129.4	128.7	129.5	129.1	129.1	128.5
2003	128.8	129.4	128.8											
Frozen	1996	125.1	124.8	124.6	124.9	125.0	125.4	125.5	125.8	126.0	125.7	125.8	126.0	125.4
	1997	125.9	125.7	125.6	125.6	125.7	125.7	126.9	125.6	125.7	126.6	125.5	125.3	125.8
	1998	125.2	126.0	124.8	125.7	125.0	124.6	125.5	125.6	125.3	125.6	125.5	125.2	125.3
	1999	125.8	126.6	125.6	126.7	125.9	126.0	126.8	126.1	126.0	126.4	125.5	125.3	126.1
	2000	125.4	126.2	125.7	126.3	126.3	124.9	125.9	126.4	126.2	126.9	126.1	126.2	126.0
	2001	127.6	128.5	127.7	128.7	128.4	127.7	128.9	128.8	128.8	130.0	129.2	129.1	128.6
	2002	130.0	131.1	130.1	131.2	130.7	129.7	131.4	131.3	131.5	132.2	131.9	132.5	131.1
2003	133.5	134.1	133.1											
Dehydrated	1996	152.7	153.1	156.5	160.8	161.0	161.6	160.8	158.7	158.1	157.7	157.6	157.7	158.0
	1997	154.9	154.9	154.5	150.5	146.3	146.2	146.1	146.0	146.3	146.8	146.7	149.2	149.0
	1998	149.2	149.0	149.8	148.9	148.7	149.0	148.7	154.4	151.9	152.2	152.4	162.0	151.4
	1999	175.3	175.3	176.3	174.7	173.6	173.5	173.5	174.6	177.2	176.3	178.0	182.1	175.9
	2000	177.3	179.5	179.9	178.8	178.2	177.7	176.8	168.1	166.4	164.6	162.6	159.2	172.4
	2001	156.8	155.1	155.3	155.6	162.4	164.0	163.5	164.6	168.0	168.6	172.6	174.9	163.5
	2002	180.8	184.1	186.6	188.3	186.0	189.3	189.8	190.3	187.5	185.9	183.5	178.0	185.8
2003	177.1	175.6	168.5											

1/ Indexes for 2003 are preliminary. 2/ Excludes potatoes. 3/ Includes vegetable juices.

Source: Bureau of Labor Statistics, U.S. Department of Labor.

Price table 5--Fresh vegetables: U.S. average retail prices, by month, 1996-2003

Item	Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Annual	Change from yr
															earlier, March
															Percent
															--Cents/lb--
Potatoes, white	1996	38.5	38.5	39.2	39.4	39.2	40.1	40.8	40.3	37.5	35.9	34.3	33.5	38.1	
	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	-15.8
	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	11.5
	1999	38.1	38.2	38.4	38.0	38.8	39.1	41.1	42.9	41.3	39.3	38.4	39.5	39.4	4.3
	2000	39.2	40.1	39.3	38.8	37.9	37.6	39.0	40.0	37.4	36.7	35.1	34.7	38.0	2.3
	2001	35.5	34.8	35.6	36.2	36.3	38.8	40.9	43.9	42.2	41.8	41.0	41.0	39.0	-9.4
	2002	42.6	44.7	46.5	49.3	50.8	51.7	54.9	55.9	51.1	49.2	47.3	47.9	49.3	30.6
	2003	48.3	47.2	46.3											-0.4
Broccoli	1996	103.7	92.6	99.9	94.1	87.4	95.5	97.1	78.8	84.3	80.1	92.4	86.2	91.0	
	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	3.3
	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	8.7
	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	-11.8
	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	8.0
	2001	98.7	97.8	108.3	95.4	99.9	100.5	98.1	97.8	96.9	101.1	89.7	97.3	98.5	1.3
	2002	137.4	168.1	114.7	120.4	103.6	109.3	111.9	113.5	124.7	107.3	116.5	105.2	119.4	5.9
	2003	112.2	110.1	119.9											4.5
Lettuce, iceberg	1996	76.9	58.7	64.7	64.6	61.3	67.2	62.7	61.5	59.5	63.4	74.6	62.2	64.8	
	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	-5.1
	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	13.2
	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	11.4
	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	-13.3
	2001	73.6	84.7	89.5	76.7	87.0	72.2	66.3	78.4	89.7	81.1	73.4	78.8	79.3	33.4
	2002	100.3	106.1	154.2	114.7	72.0	67.5	67.4	68.9	70.2	68.7	75.4	68.0	86.1	72.3
	2003	73.4	68.2	65.5											-57.5
Tomatoes, field grown	1996	110.3	108.4	146.7	186.7	137.9	112.7	103.1	100.6	98.0	108.4	118.2	121.0	121.0	
	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	12.7
	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	-8.4
	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	-7.9
	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	-2.2
	2001	141.4	131.3	133.6	143.3	124.3	135.6	125.7	118.5	116.8	126.7	146.8	140.4	132.0	-2.1
	2002	145.1	129.8	129.2	131.9	133.2	129.9	124.3	118.1	115.8	123.6	143.0	165.5	132.5	-3.3
	2003	171.1	156.5	161.9											25.3

Source: Bureau of Labor Statistics, U.S. Department of Labor.

Price table 7--Canned vegetables: Quarterly wholesale price trends, 1993-2003 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
1993													
I	8.58	11.46	6.58	9.88	6.46	11.33	6.88	9.50	7.29	9.71	0.34	15.13	
II	8.00	11.50	6.17	10.00	6.29	10.50	6.83	9.44	7.25	10.04	0.35	14.71	
III	8.38	11.63	6.17	10.25	8.79	11.46	7.08	9.38	7.38	10.38	0.36	14.67	
IV	9.42	17.38	7.17	11.75	9.29	14.29	7.88	10.54	8.13	12.38	0.39	15.75	
Average	8.59	12.99	6.52	10.47	7.71	11.90	7.17	9.71	7.51	10.63	0.36	15.06	
1994 8/													
I	9.67	19.75	7.04	13.67	9.25	15.42	7.88	11.67	8.46	13.75	0.42	16.42	
II	9.58	19.75	6.80	14.42	9.08	15.58	7.88	11.58	8.50	13.75	0.42	17.46	
III	8.67	16.17	6.80	12.92	8.50	14.17	7.71	11.25	7.92	13.75	0.40	17.25	
IV	7.42	13.08	6.33	11.67	7.25	13.50	7.63	12.13	7.50	13.50	0.41	17.38	
Average	8.84	17.19	6.74	13.17	8.52	14.67	7.78	11.66	8.10	13.69	0.41	17.13	
1995													
I	7.13	10.63	6.42	10.63	7.46	14.13	7.25	9.50	8.50	13.00	0.39	18.38	
II	6.88	10.42	6.55	10.50	7.80	14.42	7.25	9.46	7.38	13.00	0.39	18.38	
III	7.00	10.25	6.79	10.25	7.96	14.84	7.25	9.38	8.00	12.50	0.39	18.38	
IV	7.29	12.46	7.09	11.09	8.21	14.75	7.38	9.38	8.00	11.00	0.37	18.04	
Average	7.07	10.94	6.71	10.62	7.86	14.53	7.28	9.43	7.97	12.38	0.38	18.30	
1996													
I	7.17	13.83	7.38	10.83	8.21	16.25	7.84	9.63	8.00	12.00	0.36	17.50	
II	7.83	12.92	7.63	11.17	8.75	16.50	7.96	9.82	8.00	12.00	0.34	15.75	
III	8.46	13.00	7.92	11.46	9.38	16.50	8.25	10.00	7.96	12.00	0.31	16.67	
IV	7.96	12.75	7.55	11.00	9.13	16.50	7.83	10.33	7.25	12.00	0.30	17.33	
Average	7.86	13.13	7.62	11.12	8.87	16.44	7.97	9.94	7.80	12.00	0.33	16.81	
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	11.50	9.00	12.00	0.32	17.63	
II	8.33	15.08	8.33	12.05	8.75	15.08	9.00	11.50	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	15.08	8.75	11.50	9.00	12.00	0.31	20.38	
Average	8.33	15.06	8.33	12.14	8.82	15.10	8.94	11.50	9.00	12.00	0.31	18.58	
2003													
I p	8.00	14.50	8.00	11.13	9.00	15.50	8.63	11.50	9.00	12.00	0.31	20.38	
II f	8.09	15.72	8.00	11.37	9.09	17.11	8.63	11.50	9.18	11.62	0.31	20.81	
III f	7.96	15.72	7.74	11.44	9.04	16.76	8.72	11.76	9.27	11.62	0.30	20.25	
IV f	7.88	15.81	7.87	10.65	9.00	16.90	8.49	11.63	9.31	12.00	0.30	19.73	
Average	7.98	15.43	7.90	11.15	9.03	16.57	8.62	11.60	9.19	11.81	0.30	20.29	

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. 8/ In mid-1994, most canners switched from size 303 to 300 cans (have 10 percent less volume) for retail packs.

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

Price table 8--Frozen vegetables: Quarterly wholesale price trends, 1994-2003 1/

Year and quarter	Sweet corn 2/		Snap beans 3/		Green peas 4/		Carrots 5/		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--												
1994												
I	7.64	0.61	7.40	0.51	7.40	0.53	5.77	0.43	11.75	0.64	8.35	0.42
II	7.77	0.64	7.40	0.51	7.40	0.53	5.77	0.43	11.75	0.64	8.35	0.42
III	7.27	0.65	6.97	0.51	6.97	0.52	5.77	0.43	11.75	0.64	8.52	0.42
IV	6.94	0.57	6.75	0.51	6.75	0.52	5.77	0.43	11.08	0.64	8.60	0.42
Average	7.41	0.62	7.13	0.51	7.13	0.53	5.77	0.43	11.58	0.64	8.45	0.42
1995												
I	6.75	0.55	6.75	0.49	6.75	0.51	5.75	0.41	10.75	0.66	8.19	0.41
II	6.75	0.55	6.75	0.49	6.75	0.51	5.89	0.44	10.75	0.68	8.40	0.43
III	6.75	0.54	6.75	0.48	6.75	0.51	5.89	0.42	10.75	0.69	8.40	0.44
IV	6.75	0.52	6.75	0.45	6.75	0.49	5.89	0.42	10.75	0.69	8.63	0.41
Average	6.75	0.54	6.75	0.48	6.75	0.50	5.86	0.42	10.75	0.68	8.41	0.42
1996												
I	6.67	0.47	6.67	0.44	6.42	0.47	5.76	0.39	10.88	0.67	7.31	0.41
II	6.72	0.45	6.63	0.46	6.63	0.48	5.76	0.39	10.94	0.67	7.67	0.41
III	6.90	0.50	6.90	0.49	7.09	0.51	5.76	0.39	10.75	0.67	7.67	0.41
IV	6.90	0.50	6.90	0.49	7.10	0.51	5.76	0.39	10.38	0.67	7.67	0.41
Average	6.80	0.48	6.78	0.47	6.81	0.49	5.76	0.39	10.74	0.67	7.58	0.41
1997												
I	6.90	0.50	6.88	0.48	7.10	0.51	5.76	0.39	10.23	0.68	7.98	0.42
II	6.90	0.50	6.83	0.47	7.10	0.50	5.76	0.39	9.93	0.69	8.30	0.42
III	6.90	0.50	6.83	0.47	7.10	0.49	5.76	0.39	9.93	0.69	8.30	0.42
IV	6.83	0.47	6.83	0.47	6.90	0.48	5.76	0.40	9.93	0.69	8.30	0.42
Average	6.88	0.49	6.84	0.47	7.05	0.50	5.76	0.39	10.01	0.69	8.22	0.42
1998												
I	6.83	0.46	6.83	0.47	6.90	0.47	5.76	0.42	10.08	0.70	8.30	0.42
II	6.83	0.45	6.83	0.47	6.90	0.46	5.74	0.43	10.15	0.70	8.30	0.42
III	6.83	0.44	6.83	0.45	6.75	0.45	5.71	0.40	10.15	0.70	8.30	0.42
IV	6.83	0.44	6.83	0.45	6.87	0.45	5.71	0.40	10.15	0.72	8.33	0.42
Average	6.83	0.45	6.83	0.46	6.86	0.46	5.73	0.41	10.13	0.71	8.31	0.42
1999												
I	6.83	0.44	6.83	0.45	6.88	0.46	5.71	0.40	10.15	0.72	8.30	0.44
II	6.83	0.44	6.83	0.45	6.88	0.46	5.73	0.40	10.15	0.72	8.30	0.44
III	6.83	0.45	6.83	0.46	6.91	0.51	5.74	0.40	10.15	0.72	8.30	0.43
IV	6.83	0.45	6.83	0.47	6.93	0.54	5.74	0.41	10.15	0.72	8.30	0.43
Average	6.83	0.45	6.83	0.46	6.90	0.49	5.73	0.40	10.15	0.72	8.30	0.44
2000												
I	6.83	0.48	6.83	0.47	6.93	0.54	5.71	0.40	10.15	0.72	8.30	0.43
II	6.83	0.48	6.83	0.47	6.93	0.54	5.73	0.41	10.15	0.72	8.30	0.43
III	6.83	0.47	6.83	0.47	6.93	0.54	5.73	0.41	10.15	0.72	8.30	0.43
IV	6.83	0.47	6.83	0.47	6.93	0.54	5.73	0.41	10.15	0.72	8.30	0.43
Average	6.83	0.47	6.83	0.47	6.93	0.54	5.73	0.41	10.15	0.72	8.30	0.43
2001												
I	6.83	0.46	6.83	0.47	6.93	0.53	5.73	0.40	10.15	0.72	8.30	0.43
II	6.83	0.46	6.84	0.47	6.88	0.53	5.73	0.40	10.15	0.72	8.30	0.43
III	6.88	0.49	6.85	0.47	6.88	0.55	5.73	0.43	10.15	0.72	8.30	0.45
IV	6.88	0.49	6.85	0.49	6.88	0.55	5.73	0.43	10.15	0.72	8.30	0.45
Average	6.86	0.47	6.84	0.48	6.89	0.54	5.73	0.41	10.15	0.72	8.30	0.44
2002												
I	6.95	0.49	6.93	0.49	6.88	0.55	5.73	0.43	10.15	0.72	8.30	0.48
II	7.10	0.50	7.10	0.50	7.05	0.55	5.73	0.43	10.15	0.72	8.30	0.48
III	7.10	0.50	7.10	0.51	7.07	0.55	5.73	0.43	10.15	0.72	8.30	0.48
IV	7.10	0.51	7.10	0.54	7.10	0.55	5.73	0.42	10.15	0.72	8.30	0.48
Average	7.06	0.50	7.06	0.51	7.02	0.55	5.73	0.42	10.15	0.72	8.30	0.48
2003												
I p	7.10	0.51	7.10	0.54	7.10	0.55	5.73	0.43	10.15	0.72	8.30	0.48
II f	7.10	0.51	7.10	0.54	7.10	0.55	5.73	0.43	10.15	0.72	8.30	0.48
III f	7.10	0.51	7.10	0.54	7.10	0.55	5.73	0.43	10.15	0.72	8.30	0.48
IV f	7.10	0.51	7.10	0.54	7.10	0.55	5.73	0.43	10.15	0.72	8.30	0.48
Average	7.10	0.51	7.10	0.54	7.10	0.55	5.73	0.43	10.15	0.72	8.30	0.48

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

Price table 10--U.S. fresh-market herbs: Selected monthly wholesale prices in San Francisco, CA, 2002-2003

Herb	Unit	2002			2002		2003			2002-03 Chang	
		Jan.	Feb.	Mar.	Nov.	Dec.	Jan.	Feb.	Mar.	Jan.	Feb.
--- Percent ---											
Anise	24-ct crtn	17.38	15.00	12.50	11.00	10.50	7.00	7.50	12.50	- 59.7	- 50.0
Arugula	12-ct ctns	7.63	7.63	8.50	8.00	8.00	7.50	8.00	7.50	- 1.7	4.8
Basil	30-ct ctns	7.25	7.75	8.50	8.00	8.00	8.50	8.00	7.50	17.2	3.2
Celeriac	12-ct ctns	10.00	10.00	11.00	10.50	10.50	10.75	10.75	10.50	7.5	7.5
Chives	12-ct flmbag	5.75	7.06	6.50	5.25	5.25	6.50	5.50	5.00	13.0	- 22.1
Cilantro	30-ct ctns	15.00	13.70	10.25	8.00	8.00	5.00	8.50	8.00	- 66.7	- 38.0
Dill	12-ct ctns	7.25	7.50	8.50	7.00	7.00	8.63	7.75	8.00	19.0	3.3
Horseradish	50-lb sack	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	.0	.0
Oregano	12-ct flmbag	6.00	7.25	7.50	6.25	6.25	6.25	6.25	6.25	4.2	- 13.8
Rosemary	12-ct flmbag	6.00	7.13	7.00	6.25	6.25	6.25	6.25	6.25	4.2	- 12.3
Mint	12-ct ctns	8.75	8.50	8.50	7.75	8.00	9.00	7.75	7.75	2.9	- 8.8
Savory	12-ct flmbag	6.00	6.00	8.00	6.00	6.00	6.00	6.00	6.00	.0	.0
Sorrel	5-1kg flmbg	6.00	6.00	7.50	6.00	6.00	6.00	6.00	6.00	.0	.0
Thyme	12-ct flmbag	6.00	6.88	7.50	6.50	6.50	6.00	6.00	6.00	.0	- 12.8
Sage	12-ct flmbag	5.91	7.29	7.50	6.50	6.00	6.25	6.25	6.25	5.8	- 14.3
Watercress	12-ct ctns	10.75	10.31	10.50	8.00	8.00	8.00	10.00	9.50	- 25.6	- 3.0

Source: Derived from data provided by the Agricultural Marketing Service, U.S. Department of Agriculture.

Price table 11--Farm-retail price spreads

Item	Annual			2001	2002					
	2000	2001	2002	Dec	Jul	Aug	Sep	Oct	Nov	Dec
Market basket¹										
Retail cost (1982-84=100)	170.6	177.2	180.3	178.9	179.5	179.8	179.9	179.6	180.3	181.3
Farm value (1982-84=100)	96.9	106.2	104.3	105.6	102.0	103.1	102.8	102.1	105.7	105.4
Farm-retail spread (1982-84=100)	210.3	215.4	221.2	218.5	221.3	221.1	221.4	221.4	220.5	222.1
Farm value-retail cost (%)	19.9	21.0	20.3	20.7	19.9	20.1	20.0	19.9	20.5	20.4
Fresh vegetables										
Retail cost (1982-84=100)	219.4	230.6	245.4	230.4	241.8	238.9	236.1	233.5	240.6	245.2
Farm value (1982-84=100)	121.4	129.9	145.8	119.1	151.6	141.9	122.0	108.3	126.1	127.6
Farm-retail spread (1982-84=100)	269.8	282.4	296.6	287.6	288.2	288.7	294.7	297.9	299.5	305.6
Farm value-retail cost (%)	18.8	19.1	20.2	17.6	21.3	20.2	17.5	15.8	17.8	17.7
Processed fruits and vegetables										
Retail cost (1982-84=100)	153.6	159.3	166.2	161.1	166.5	170.0	170.5	169.8	166.9	169.2
Farm value (1982-84=100)	106.4	107.9	110.5	112.2	111.1	109.9	107.9	106.9	106.1	107.1
Farm-retail spread (1982-84=100)	168.3	175.3	183.6	176.4	183.8	188.8	190.0	189.4	185.9	188.6
Farm value-retail cost (%)	16.5	16.1	15.8	16.6	15.9	15.4	15.0	15.0	15.1	15.0
Fresh fruit										
Retail cost (1982-84=100)	284.3	291.7	298.0	298.7	287.1	290.1	299.9	300.7	303.0	313.9
Farm value (1982-84=100)	141.3	145.7	154.4	170.8	129.7	150.5	158.9	159.4	165.2	165.6
Farm-retail spread (1982-84=100)	350.3	359.1	364.2	357.7	359.8	354.6	365.0	366.0	366.6	382.4
Farm value-retail cost (%)	15.7	15.8	16.4	18.1	14.3	16.4	16.7	16.7	17.2	16.7
Meat products										
Retail cost (1982-84=100)	150.4	159.3	160.3	160.0	160.2	160.7	159.9	159.5	159.7	160.3
Farm value (1982-84=100)	88.4	97.4	102.6	100.9	102.8	103.1	103.4	104.0	104.4	104.6
Farm-retail spread (1982-84=100)	214.0	222.8	219.5	220.6	219.1	219.8	217.9	216.5	216.5	217.4
Farm value-retail cost (%)	29.8	31.0	32.4	31.9	32.5	32.5	32.7	33.0	33.1	33.1
Dairy products										
Retail cost (1982-84=100)	160.7	167.1	168.1	170.8	167.6	167.2	166.3	166.5	167.1	167.3
Farm value (1982-84=100)	98.8	118.5	97.6	105.9	91.2	92.6	93.4	97.4	95.7	95.9
Farm-retail spread (1982-84=100)	217.7	211.8	233.1	230.7	238.0	236.0	233.5	230.2	232.9	233.1
Farm value-retail cost (%)	29.5	34.0	27.8	29.7	26.1	26.6	26.9	28.1	27.5	27.5
Poultry										
Retail cost (1982-84=100)	159.8	164.9	167.0	167.7	167.2	166.1	167.8	166.6	168.1	166.6
Farm value (1982-84=100)	117.4	126.2	102.0	118.9	102.6	96.9	99.2	93.7	97.7	97.2
Farm-retail spread (1982-84=100)	208.7	209.3	242.0	223.9	241.6	245.7	246.8	250.5	249.1	246.5
Farm value-retail cost (%)	39.3	41.0	32.7	38.0	32.8	31.2	31.6	30.1	31.1	31.2
Eggs										
Retail cost (1982-84=100)	131.9	136.4	138.2	133.5	134.8	138.5	136.1	134.7	143.6	146.5
Farm value (1982-84=100)	80.6	74.3	72.1	70.5	65.5	75.5	67.0	59.8	96.8	89.2
Farm-retail spread (1982-84=100)	223.9	248.0	256.9	246.8	259.3	251.8	260.2	269.3	227.7	249.5
Farm value-retail cost (%)	39.3	35.0	33.5	33.9	31.2	35.0	31.6	28.5	43.3	39.1
Cereal and bakery products										
Retail cost (1982-84=100)	188.3	193.8	198.0	195.3	198.7	198.6	198.4	198.9	198.3	197.3
Farm value (1982-84=100)	75.2	78.8	86.4	76.6	83.6	91.6	100.1	101.6	102.1	95.8
Farm-retail spread (1982-84=100)	204.0	209.9	213.6	211.9	214.8	213.5	212.1	212.5	211.7	211.5
Farm value-retail cost (%)	4.9	5.0	5.3	4.8	5.2	5.6	6.2	6.3	6.3	5.9
Fats and oils										
Retail cost (1982-84=100)	147.4	155.7	155.4	156.9	154.9	154.1	155.3	155.9	153.4	152.8
Farm value (1982-84=100)	80.9	76.9	91.7	80.3	96.0	101.2	98.6	101.9	110.5	108.6
Farm-retail spread (1982-84=100)	171.9	184.7	178.9	185.1	176.6	173.6	176.1	175.8	169.2	169.1
Farm value-retail cost (%)	14.8	13.3	15.9	13.8	16.7	17.7	17.1	17.6	19.4	19.1

1/ Retail costs are based on CPI-U of retail prices for domestically produced farm foods, published monthly by the Bureau of Labor Statistics (BLS). Farm value is the payment for the quantity of farm equivalent to the retail unit, less allowance for by-product. 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.