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Vegetables and Melons Outlook

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Potato Market Weak Despite Modest Crop

Total potato production for the 2003 crop year is forecast at 457 million cwt—down less than 1 percent from 2002. Despite the slight drop in production, however, U.S. grower prices for all potatoes have averaged 19 percent below a year ago and 14 percent below 2 years ago for the September - November period. These lower early-season grower prices, combined with lower retail prices for potatoes and frozen french fries, may be a reflection of weaker demand for potatoes and potato products.

Domestic production of vegetables and melons is forecast to increase an average of 2 percent annually during the next decade (2004-2013). The farm value of production is expected to increase an average of 3.3 percent a year. This would place total U.S. production at nearly 72 million metric tons by 2013, with an estimated farm value of \$21 billion.

Per capita consumption of cucumbers for pickles has declined 3 percent from 4.6 pounds in the 1990s to 4.5 pounds during the 2000-02 period. Although per capita use now stands about 16 percent below the average of the 1980s, pickling cucumbers remain the third leading shelf stable (packed in cans/jars) vegetable in terms of consumption, after tomatoes and sweet corn.

Lettuce prices have been on a roller coaster ride this fall due largely to abnormally high temperatures during the early part of the desert growing season in California and Arizona. As a result, growth of this cool-season crop was stunted, disrupting harvest schedules and market flow, paring yields, and reducing quality. Head sizes were smaller, leaf quality was variable, and fall retail prices remained well above a year earlier. In November, retail prices for whole head lettuce averaged 93 cents per pound--23 percent above a year earlier.

The forecast for U.S. dry bean production was reduced to 22.8 million cwt, down 24 percent from a year ago. Output was down in 12 of the 18 producing States and for 8 of the 13 identified classes. Among the five classes that rose, Great Northern beans (up 41 percent) and blackeye beans (up 37 percent) were most notable. The largest percentage decline among the major classes was in black beans—down 59 percent. Although grower prices have been slow to respond to the small crop, November prices averaged 16 percent higher.

This issue includes a commodity highlight focusing on fresh-market carrots.

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The next release is
February 26, 2004

Approved by the
World Agricultural
Outlook Board

Industry Overview

Fresh market vegetables: This November, shipments of whole head lettuce were down 20 percent from a year ago. December head lettuce prices, which were strong in both 2001 and 2002, are expected to move lower as supplies build during the month but could remain unsettled until after the holiday season.

Processing vegetables: With domestic pickling cucumber output likely down, imports of both cucumbers for pickling and prepared brine stock are higher. Imports of cucumbers and gherkins in a provisionally prepared state increased 63 percent to 99 million pounds during the first 10 months of 2003.

Potatoes: U.S. fall-season potato production is 411.3 million cwt, down nearly 1 percent from last year, but nearly 5 percent greater than the 2001 crop. Area harvested was down 2 percent from last fall and yields were up 1 percent. The 2003/04 season-average price for U.S. potatoes is forecast to range between \$5.50 and \$6.50/cwt—down from \$6.69/cwt a year earlier.

Long-run outlook: Looking out over the next 10 years, potatoes are expected to remain the largest vegetable crop produced in the United States in terms of volume. However, lettuce (all types) could surpass potatoes in terms of crop value sometime in the next 10 years. Assuming demand for potatoes and potato products recovers from the lull of recent years, potatoes should account for over one-third of total vegetable tonnage and 16 percent of total expected farm value of vegetables in 2013.

Dry beans: Recently released production of dry beans by class indicated that output of pinto beans declined 17 percent this year. Pinto beans accounted for 47 percent of the U.S. dry bean crop. Output of black beans (down 59 percent) and navy beans (down 52 percent) were slashed due to cutbacks in acreage prompted by last season's low prices. With the smaller crop, the preliminary November grower price for all dry beans was \$18.40—up 16 percent from a year ago.

Dry peas and lentils: The first estimates of Dec. 1 stocks of dry peas, lentils, and small chickpeas will be released in the *Grain Stocks* report on January 12. Lentil prices remain strong, with dealer prices in mid-December averaging \$22.50/cwt—up 16 percent from a year ago. Dealer prices for green split peas remain 3 percent below a year-earlier at \$16.25/cwt.

Mushrooms: The value of U.S. imports for all mushrooms increased 20 percent to \$66 million during the first 4 months (July-October) of the 2003/04 crop year. Fresh-market imports declined 3 percent to \$19 million, while canned imports rose 41 percent to \$42 million.

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

Item	Unit	2001	2002	2003
Area harvested	1,000 ac.	6,336	6,868	6,564
Vegetables				
Fresh & melons	1,000 ac.	2,038	1,934	1,939
Processing	1,000 ac.	1,334	1,349	1,335
Potatoes	1,000 ac.	1,222	1,270	1,250
Dry beans	1,000 ac.	1,249	1,727	1,362
Other 2/	1,000 ac.	494	587	679
Production	Mil. cwt	1,262	1,319	1,296
Vegetables				
Fresh & melons	Mil. cwt	472	457	450
Processing	Mil. cwt	302	344	335
Potatoes	Mil. cwt	438	460	457
Dry beans	Mil. cwt	20	30	23
Other 2/	Mil. cwt	30	28	31
Crop value	\$ mil.	14,927	15,550	15,398
Vegetables				
Fresh & melons	\$ mil.	8,967	9,282	9,500
Processing	\$ mil.	1,325	1,404	1,390
Potatoes	\$ mil.	3,058	3,151	2,800
Dry beans	\$ mil.	426	520	458
Other 2/	\$ mil.	1,151	1,193	1,250
Unit value 3/	\$/cwt	11.83	11.79	11.88
Vegetables				
Fresh & melons	\$/cwt	18.99	20.33	21.11
Processing	\$/cwt	4.38	4.08	4.15
Potatoes	\$/cwt	6.99	6.69	6.00
Dry beans	\$/cwt	22.10	17.00	20.02
Other 2/	\$/cwt	38.46	42.14	40.72
Trade				
Imports	\$ mil.	4,544	4,814	5,430
Vegetables				
Fresh & melons	\$ mil.	2,592	2,614	3,025
Processing	\$ mil.	1,020	1,189	1,285
Potatoes	\$ mil.	523	575	680
Dry beans	\$ mil.	51	67	55
Other 4/	\$ mil.	357	369	385
Exports	\$ mil.	3,212	3,274	3,355
Vegetables				
Fresh & melons	\$ mil.	1,183	1,204	1,290
Processing	\$ mil.	815	798	835
Potatoes	\$ mil.	700	723	650
Dry beans	\$ mil.	176	180	175
Other 4/	\$ mil.	338	369	405
Per capita use	Pounds	441	437	444
Vegetables				
Fresh & melons	Pounds	172	170	171
Processing	Pounds	116	119	121
Potatoes	Pounds	138	132	135
Dry beans	Pounds	7	7	7
Other 2/	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

Fall Heat Generates Higher Lettuce Prices

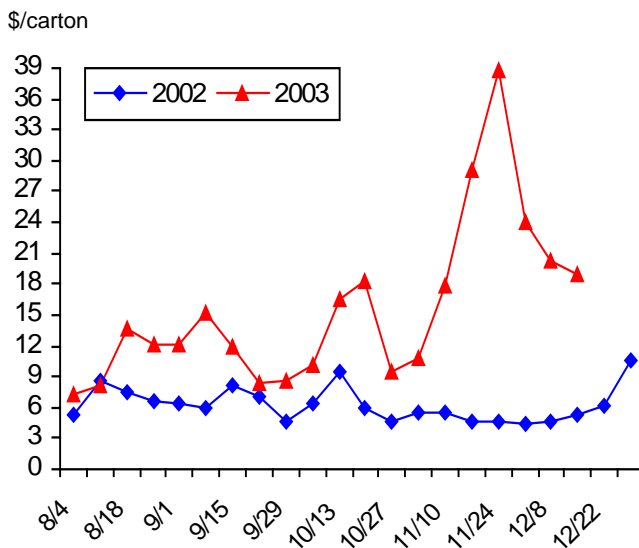
Lettuce prices have been on a roller coaster ride this fall due largely to abnormally high temperatures during the early part of the desert growing season (fig. 1). As a result, growth of the early California/Arizona desert crop was stunted, disrupting harvest schedules and market flow, paring yields, and reducing product quality. Head sizes were smaller, leaf quality was variable, and retail prices averaged 23 percent above a year earlier for bulk (whole head) lettuce in November.

When the final data are compiled, f.o.b. shipping-point prices for head lettuce may approach the 1987 record high of \$43.10 per cwt set for the month of November. The 1987 November high was caused largely by a serious outbreak of disease transmitted by whiteflies that reduced shipments by 15 percent from a year earlier. This November, shipments of head lettuce were down 20 percent from a year ago. December head lettuce prices, which were strong in both 2001 and 2002, are expected to drift significantly lower but remain unsettled until after the holiday season--likely averaging below those of a year earlier (\$30/cwt) for the month.

Fall Tomato Prices Flat Despite Lower Volume

Heavy late summer-fall rains and winds during the growing season in both Mexico and Florida affected the late fall tomato crop. Florida's fall tomato area was down 8 percent and yields were reportedly lower due to increased disease and bloom drop. As a result, November tomato shipments declined 19 percent from a year earlier but volume is anticipated to improve in December and into the winter. As a result of these offsets, fall-season shipping-point prices are expected to average just below the \$35.23/cwt of last fall.

Figure 1
Head lettuce: Weekly f.o.b. price, California, Aug-Dec



Source: Derived from USDA, AMS, Market News.

Table 3--Selected fresh-market trade volume, Jan. - Oct.

Item	Annual 2002	January - October		Change 2002-03 Percent
		2002	2003	
Exports, fresh:				
Vegetables	39,322	32,230	32,556	1
Melons	6,283	5,918	5,473	-8
Potatoes	6,435	5,868	4,983	-15
Total	52,040	44,016	43,012	-2
Imports, fresh:				
Vegetables	65,609	53,787	57,344	7
Melons	19,511	16,550	15,910	-4
Potatoes	6,215	4,780	5,220	9
Total	91,335	75,117	78,474	4

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

Table 2--U.S. quarterly f.o.b. shipping-point prices, selected vegetables, 2003-2004

Commodity	2003				2004				Change First Q 1/ Percent
	First	Second	Third	Fourth *	First *	Second *	Third *	Fourth *	
--- Dollars per 100 lbs ---									
Asparagus	99.73	116.33	162.33	145.00	130.00	120.00	156.00	--	30.4
Broccoli	27.47	27.13	35.30	41.30	30.10	26.25	33.10	36.50	9.6
Carrots	19.03	19.73	20.13	19.20	19.15	19.50	18.40	17.40	0.6
Cauliflower	28.63	37.80	30.90	42.50	34.00	35.30	28.65	40.25	18.8
Celery	10.90	12.45	12.43	17.90	14.00	17.10	12.75	13.85	28.4
Sweet corn	23.97	15.60	19.13	23.40	25.25	18.05	20.05	24.00	5.3
Cucumbers	24.90	20.60	23.00	17.00	25.50	18.85	22.50	17.75	2.4
Lettuce, head	10.88	22.50	19.10	32.00	15.50	19.00	18.25	17.00	42.5
Onions, dry bulb	16.60	32.33	14.90	13.70	15.75	19.00	14.00	11.50	-5.1
Snap beans	58.43	58.43	52.87	49.40	49.00	45.20	56.90	53.25	-16.1
Tomatoes, field-grown	43.43	32.67	40.63	33.50	29.75	30.55	28.50	36.00	-31.5
All vegetable index 2/	776	956	898	1,020	810	900	890	870	4.4

-- = not available. * = ERS forecast. 1/ Change for first-quarter 2004 over first-quarter 2003. 2/ Index base is 1910-14=100.

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

Winter Outlook

Assuming average crop yields this winter (largely Jan.-Mar.), fresh-market vegetable shipping-point prices are expected to average above the relatively low levels of a year earlier. Strong prices for onions and leafy crops are expected to outweigh lower prices for tomatoes and other warm-season crops, which may also face price pressure from increased import volume. It is expected that strong supplies will be met by consumption gains brought about by improved economic conditions. Of course, a freeze in Florida or sustained cold weather in the desert production regions could change this outlook.

Thus, as usual, the outlook for the winter season is largely dependant on the weather in southern Florida, various areas in Mexico (particularly Sinaloa), and the desert growing regions of California and Arizona. According to the Climate Prediction Center of the National Weather Service, drier-than-average conditions are more likely in California and Florida and in the drought-stricken Mountain States. California, Arizona, and Texas can expect warmer-than-average temperatures this winter. The temperature outlook in Florida is less certain, with an equal chance of above- or below-normal readings this winter. An update on the 90-day winter weather outlook is due December 18 and can be found at <http://www.noaanews.noaa.gov/>

Despite the disincentive of generally lower prices for cool-season vegetables (lettuce, broccoli, celery, etc.) last winter, area for harvest this winter is expected to be constant to slightly higher than a year ago. Yields, however, are far from certain. Cool-season winter crops are largely produced in the Western States. Despite lower prices last winter, western lettuce area may be up slightly as shippers attempt to ensure sufficient volume to cover the various markets. Because lettuce imports have historically been very low (1 percent or less of consumption), there are few alternatives when weather or disease disrupts supply from the primary western growing regions and causes prices to jump.

Warm-season crops (tomatoes, peppers, cucumbers, etc.) are mostly sourced from Florida and Mexico. Although prices for cool-season crops were lower last winter, warm-season crop prices were generally higher. Winter vegetable area is expected to be up in Florida and Mexico, but late fall/early winter volumes in Florida are expected to be muted by the effects of excess rain at the start of the growing season. This winter, Florida tomato area is expected to be higher (after 2 consecutive years of restrained area) and with average weather, domestic supplies should be improved over a year ago. With a good crop expected in Mexico, imports may also rise, pressuring prices. As a result, winter-quarter shipping-point prices for fresh-market tomatoes are expected to average well below the strong \$43.43/cwt (\$10.86 per 25-lb box) received last winter.

Table 4--Selected fresh-market vegetable shipments 1/

Item	October	November		Change 2002-03 Percent
	2003	2002	2003	
		--1,000 cwt--		
Asparagus	206	216	195	-10
Snap beans	263	317	251	-21
Broccoli	755	722	638	-12
Cabbage	1,131	1,050	1,053	0
Carrots	915	1,085	714	-34
Cauliflower	483	449	304	-32
Celery	1,501	1,868	1,813	-3
Sweet corn	447	320	240	-25
Cucumbers	1,017	1,204	1,084	-10
Head lettuce	3,765	3,015	2,417	-20
Romaine	1,301	801	1,041	30
Dry onions	4,535	4,076	3,216	-21
Bell pepper	1,089	1,092	971	-11
Squash	408	849	705	-17
Tomatoes	3,923	3,609	2,941	-19
Cherry tomato	170	252	277	10
Watermelon	562	562	557	-1
Total	22,265	21,271	18,222	-14

1/ Data for 2003 are preliminary.

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

For warm-season crops like tomatoes and peppers, disruptions in supplies from Florida (due to events such as freezes or excessive rains) can be partly offset by increased shipments from places such as Mexico or scattered hothouse operations. But even here, the supply response is limited due to the nature of fresh vegetable production. Fresh production tends to be more of a hand-to-mouth operation since most crops are perishable and have very limited storage times.

Trade: Fresh Imports Up

During the first 10 months of 2003 (January to October), the volume of fresh-market vegetable imports (excluding potatoes, mushrooms, melons, and pulses) was up 7 percent from a year earlier. The following were the top seven fresh import items in terms of Jan.-Oct. volume (in rank order);

1. Tomatoes (all), up 14 percent from 2002;
2. Cucumbers, down 1 percent;
3. Onions (dry-bulb), up 13 percent;
4. Bell peppers (non-pungent), up 2 percent;
5. Squash (excl. calabaza), up 13 percent;
6. Chile peppers, up 14 percent;
7. Asparagus, up 20 percent.

In terms of value, fresh vegetable imports increased 19 percent through October to \$2.28 billion, while fresh melon import value fell 13 percent to \$189 million. Over the final quarter of 2003, with strong prices for several items pulling in more volume, import value will likely rise. Given expanding year-round vegetable demand, calendar-year fresh vegetable and melon imports are expected to rise again in 2004.

Processing Vegetables

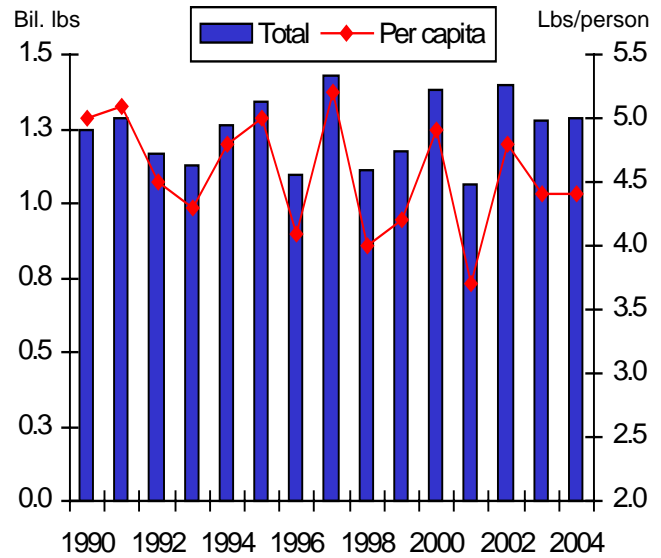
Pickling Cucumber Output Likely Down

Although production data will not be released until January 29, 2004, preliminary industry data on processor intake of cucumbers for pickling suggest domestic production of cucumbers for pickling was reduced as much as a tenth in 2003. Much of the reduction may have occurred in Southern States where processor intake was down by nearly one-fifth. Yields were likely reduced by periods of heavy rain and increased disease that also caused losses in fresh vegetable production in several States.

Pickle processors had indicated this summer that they had contracted for about one-third more area in 2003. Much of the increase in contracting occurred in Texas (up 8,500 acres), Florida (up 5,200 acres), and Michigan (up 5,000 acres). Because processors annually adjust the share of area under contract depending on market conditions, this large jump in pickling cucumber area could not be viewed as a harbinger of increasing output. After routinely contracting for an average of 86 percent of area during the 1990s, pickle processors reduced area under contract to 69 percent over the first 3 years of the 2000s, reaching a low of 65 percent in 2002. With an estimated 101,800 acres under contract in 2003, contract share will likely approach 90 percent.

With domestic output of pickling cucumbers reduced, imports of both cucumbers for pickling and prepared brine stock are higher. Imports of cucumbers and gherkins in a provisionally prepared state increased 63 percent to 99 million pounds during the first 10 months of 2003. In addition, industry data indicate that imports of fresh (green) pickling cucumbers through the end of November were up 37 percent from a year earlier.

Figure 2
Cucumbers for pickles: Consumption 1/



1/ Fresh-weight basis. Source: ERS, USDA.

About 6 percent of annual consumption of pickling cucumbers is satisfied by imports.

Domestic use of cucumbers for pickles has averaged about 1.3 billion pounds over the last 3 years (2000-02)—up 5 percent from the average of the 1990s. However, on a per person basis, average use continues to trend lower. Per capita consumption has declined 3 percent from 4.6 pounds in the 1990s to 4.5 pounds during the 2000-02 period. Although per capita use now stands about 16 percent below the average of the 1980s, pickling cucumbers remain the third leading shelf stable (packed in cans/jars) vegetable in terms of consumption, after tomatoes and sweet corn.

Table 5--Processing vegetables: Consumer and producer price indexes

Item	Nov	Oct	Nov	Change previous:		Apr.-Jun			July-Sept.		
	2003	2003	2002	Month	Year	2003			2002		
	Index			Percent		Index			Percent		
Consumer Price Indexes (12/97=100)											
Processed fruits and vegetables	113	115	112	-1.4	1.2	114	114	116	1.4	1.5	
Canned vegetables	115	115	113	-0.3	2.1	117	117	118	1.4	0.9	
Frozen vegetables (1982-84=100)	173	172	169	0.6	2.1	172	172	175	1.8	1.6	
Dry beans, peas, lentils	109	109	111	-0.2	-1.9	109	111	109	0.1	-1.6	
Olives, pickles, relishes	105	110	110	-4.1	-4.8	111	107	107	-3.6	-0.2	
Producer Price Indexes (1982=100)											
Canned vegetables and juices	131	131	129	0.1	1.5	129	129	129	0.0	0.5	
Pickles and products	180	180	180	0.0	-0.2	180	180	180	0.0	0.0	
Tomato catsup and sauces 1/	125	125	123	0.0	2.4	124	122	124	0.0	1.5	
Canned dry beans	124	124	124	0.3	0.4	124	123	123	-0.2	0.0	
Vegetable juices 1/	109	109	111	0.0	-1.5	109	108	109	0.0	1.4	
Frozen vegetables	135	135	132	-0.1	2.4	134	131	134	0.3	2.2	
Dried/dehydrated vegetables	156	156	184	-0.2	-15.0	177	189	164	-7.3	-13.1	

1/ Index base year is 1987. Source: Bureau of Labor Statistics, U.S. Department of Labor.

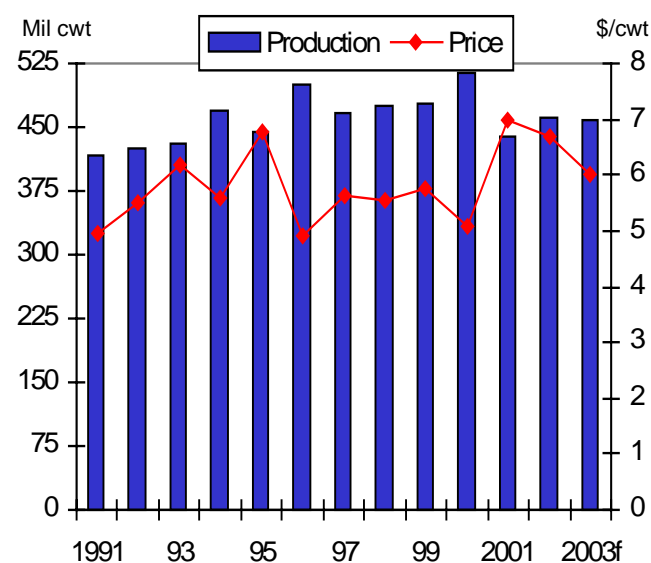
Fall-Season Production Declines Slightly

The December estimate of U.S. fall-season potato production is 412 million cwt, down 1 percent from last year but 5 percent greater than the 2001 crop. Area harvested was down 2 percent from last fall, and yields were up 1 percent. Production was generally higher this fall in the Central and Eastern States, but lower in the West—the converse of last fall’s crop. In the nine Western States, production is estimated at 273 million cwt, down 6 percent from last year but 3 percent above 2001. Harvested acreage in the West is down 4 percent from last fall, and the overall average yield was down 2 percent. Hot weather and/or drought reduced yields in California, Colorado, Idaho, and Oregon. Yields were up from last fall in Washington, Utah, Nevada, and Montana.

Production was forecast at 110 million cwt in the eight Central States, and 29 million cwt in the five Eastern States, up 13 and 9 percent, respectively, from last year. Area harvested and average yields were also up in both regions, and Indiana and Massachusetts were the only two States in either region with a decrease in production this year. The largest producers in each region, Wisconsin in the Central and Maine in the East, realized production gains of 9 percent and less than 1 percent, respectively.

With increased production in the East and Central regions, and a decrease in the West, the Central regions’ share of U.S. fall-season production rose to 27 percent (up from 24 percent last fall), the East to 7 percent (up from 6 percent), while the West’s share fell to 66

Figure 3
Potatoes, all: Production and season-average price



Source: USDA, NASS and ERS.

percent (down from 70 percent). And although the overall crop is only down slightly from last fall, shrinkage and loss could be higher this year, particularly in the West, where summertime heat and drought put stress on potatoes. That could lead to increased breakdown of potatoes while in storage during the winter. Processor recovery rates could also be down in the West this year, meaning it may take more potatoes than normal to produce finished frozen products. All of these factors could reduce the overall domestic supply below what the production statistics currently show as the season progresses.

Table 6--Potatoes: Monthly average shipping-point prices

Year	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
	\$/cwt											
All potatoes:												
2000/01	4.65	4.32	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	6.68	7.49	7.15	6.47	6.43	6.22
2003/04	4.93	4.67	5.17									
Tablestock:												
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	7.96	9.37	9.27	7.97	8.34	9.22
2003/04	6.29	5.70										
Processing:												
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	5.33	5.72	5.63	5.52	5.32	4.89
2003/04	4.49	4.39										

Source: National Agricultural Statistics Service, USDA.

Early-Season Prices May Indicate Continuing Weak Demand

Based on the December estimate of the fall crop, total potato production for the 2003 crop year is 457 million cwt—down less than 1 percent from 2002. Despite the slight drop in production, however, U.S. grower prices for all potatoes have averaged 19 percent below a year ago and 14 percent below 2 years ago for the September - November period. In September and October, prices for U.S. fresh-market potatoes averaged \$6.00/cwt, 37 percent below the same two months a year ago and 35 percent below two years ago. Prices for processing potatoes during September and October averaged \$4.44/cwt, 5 percent below year-previous levels, and 1 percent below 2 years ago.

Lower early-season grower prices, combined with lower retail prices for potatoes and frozen french fries, likely reflect weakening overall demand for potatoes and potato products. Retail prices for fresh potatoes have been lower than year-previous levels since March, while the frozen fry retail price has been below year-previous

levels since November 2002. Frozen french fry retail prices are currently at their lowest levels since 1998 (potato appendix table 6). Early crop utilization and disappearance numbers also seem to indicate relatively weak demand. On December 1, potato stocks in the 15 major States were 267 million cwt—up 1 percent from a year ago despite the slight decline in fall production. Disappearance totaled 137 million cwt, down 4 percent from a year ago.

Processing use through November was down 8 percent from last year's pace, although it is 8 percent higher than in 2001. Despite the lower processing use this year, stocks of frozen potato products have, for the most part, remained at or above year-previous levels. At the end of October, stocks of all frozen products were virtually the same as a year ago, with stocks of fries down 2 percent and stocks of other frozen potato products up 9 percent.

If demand remains soft, processing use will likely continue to lag well behind last year's pace, and stocks of frozen products should remain at or near previous-year levels. However, if demand improves, reduced potato production in the West could put pressure on available processing supplies, possibly forcing processors to purchase more open-market potatoes and help keep prices from plummeting further.

Prices later in the marketing season will depend on utilization and disappearance throughout the year. However, unless demand improves noticeably, it is unlikely that prices will approach year-previous levels. Canadian production is up significantly (13 percent from last year) to a record high 117 million cwt, pegging total 2003 North American production at 575 million cwt, up 2 percent from last year, and 8 percent above 2 years ago. Combined with increased Canadian frozen processing capacity, this means imports of Canadian fries will continue to increase in 2004. So even if U.S. supplies are a little tight this year, there will likely be ample supply from Canada to meet any modest increase in U.S. market demand. This also means that the U.S. trade deficit in frozen potato products is likely to increase in 2004.

However, one potentially mitigating factor in the U.S. potato trade outlook could be the relatively small potato crop in Europe this fall. With reports of the overall European crop being down by as much as 12 percent from last year, there could be improved export markets for both U.S. and Canadian potato products in 2004 despite the overall lull in worldwide demand. Considering all these factors, the 2003 season-average price for U.S. potatoes is forecast to range between \$5.50 and \$6.50/cwt.

Table 7--Potatoes: Prices received, selected States 1/

Item	Use	October		Change 2002-03 Percent
		2002 --Dollars/cwt--	2003	
California	All	9.40	10.40	11
Colorado	All	6.50	5.00	-23
	Fresh	7.40	5.39	-27
Idaho	All	5.15	4.20	-18
	Fresh	6.00	4.00	-33
	Processing	4.80	4.30	-10
Maine	All	5.65	5.40	-4
Michigan	All	6.40	5.30	-17
Minnesota	All	6.75	5.00	-26
New York	All	11.80	9.80	-17
North Dakota	All	6.00	4.85	-19
	Fresh	10.30	4.80	-53
	Processing	4.85	4.85	0
Ohio	All	8.65	6.55	-24
Oregon	All	4.80	4.50	-6
Pennsylvania	All	8.90	6.90	-22
Washington	All	4.85	4.45	-8
	Processing	4.50	4.20	-7
Wisconsin	All	6.25	5.35	-14
	Fresh	7.75	5.80	-25
	Processing	5.35	5.00	-7
United States	All	5.50	4.67	-15
	Fresh	8.34	5.70	-32
	Processing	4.74	4.39	-7

1/ Average grower prices for potatoes sold for all uses, fresh (tablestock) use, and processing use.

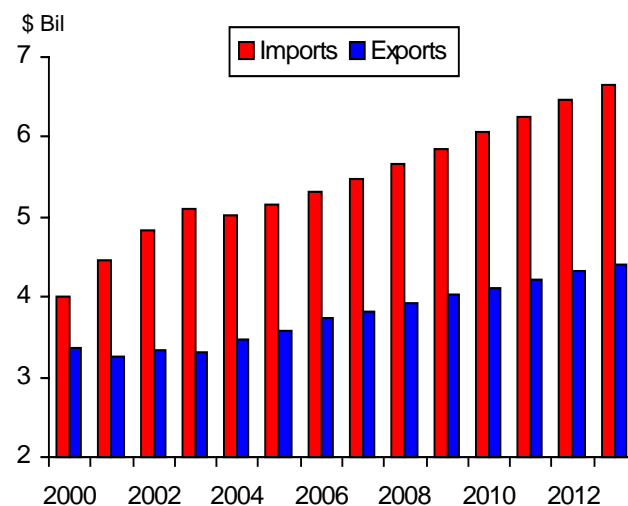
Source: National Agricultural Statistics Service, USDA.

Crop Value To Reach \$21 Billion by 2013

Domestic production of vegetables and melons is forecast to increase an average of 2 percent annually during the next decade (2004-2013), while value of production is expected to increase an average of 3.3 percent a year. This would place total U.S. production at nearly 72 million metric tons by 2013, with an estimated farm value of \$21 billion (table 8). All major categories (fresh, processed, potatoes, sweet potatoes, pulses, and mushrooms) are expected to register gains. Throughout the baseline period, potatoes will remain the largest vegetable crop produced in the United States in terms of volume; however, lettuce (all types combined) could pass potatoes in terms of crop value towards the end of the baseline period. Assuming demand for potatoes and potato products recovers from the lull of recent years, potatoes should account for over one-third of total vegetable tonnage and 16 percent of total forecast farm value of vegetables in 2013. Fresh market vegetables (excludes fresh-market potatoes, sweet potatoes, and mushrooms) will also account for over one-third of total tonnage and are forecast to account for 65 percent of the total farm value of all vegetables in 2013. Lettuce and tomatoes should continue to be the top two crops in the fresh-market category in terms of farm value.

Farm value for fresh vegetables is forecast to increase by an average of 4.2 percent a year during the next decade, while fresh vegetable production (tonnage) is forecast to increase at an average rate of 2.5 percent a year. These growth rates are second only to pulses (forecast average growth rates of 4.9 and 4.4 percent for value and volume, respectively) due largely to an expected surge in pulse production in the next few

Figure 4
Vegetables and melons: Long-run trade outlook



Source: USDA, ERS.

years. Grower prices for fresh vegetables are expected to rise at a slightly faster pace than in any of the other categories.

As world trade continues to increase in the coming decade, the United States' net trade deficit in vegetables is expected to increase from \$1.5 billion in 2002 to a forecast of \$2.2 billion in 2013. Exports of vegetables and processed vegetable products are forecast to increase by an average of 2.9 percent annually from 2004-2013, totaling \$4.4 billion by 2013. However, imports are expected to experience similar growth rates (average of 2.7 percent/year) as exports over the 10-year period, placing the total forecast import value at nearly \$6.7 billion in 2013.

Table 8--Vegetables and melons outlook: U.S. production and value, 2002-13

		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Production, farm weight													
Fresh 1/	1,000 mt	19,536	19,766	20,598	21,089	21,659	22,195	22,719	23,236	23,751	24,268	24,788	25,314
Processed 2/	1,000 mt	15,892	15,682	15,661	15,760	16,242	16,519	16,776	17,019	17,254	17,483	17,707	17,926
Potatoes	1,000 mt	20,856	20,831	21,075	22,988	23,152	23,437	23,708	23,978	24,247	24,515	24,781	25,047
Sweet potatoes	1,000 mt	584	640	665	669	677	685	693	701	709	717	725	734
Pulses	1,000 mt	1,673	1,408	1,693	1,785	1,889	1,965	1,989	2,027	2,056	2,086	2,115	2,144
Mushrooms	1,000 mt	383	383	392	401	411	420	430	440	450	460	471	481
Total	1,000 mt	58,924	58,710	60,085	62,693	64,030	65,221	66,315	67,401	68,467	69,528	70,587	71,646
Value of production													
Fresh 1/	\$ mil.	8,912	9,196	9,548	9,922	10,350	10,791	11,247	11,719	12,210	12,722	13,255	13,813
Processed 2/	\$ mil.	1,423	1,482	1,481	1,494	1,550	1,585	1,618	1,649	1,678	1,706	1,733	1,758
Potatoes	\$ mil.	3,066	2,975	3,143	3,177	3,217	3,246	3,271	3,292	3,311	3,328	3,344	3,357
Sweet potatoes	\$ mil.	210	226	237	242	248	254	260	266	272	278	284	290
Pulses	\$ mil.	582	542	606	645	698	739	758	782	804	826	848	871
Mushrooms	\$ mil.	908	889	883	902	920	938	956	973	989	1,005	1,020	1,035
Total	\$ mil.	15,101	15,311	15,898	16,382	16,983	17,554	18,109	18,682	19,265	19,866	20,484	21,124

1/ Includes artichokes, asparagus, snap beans, broccoli, brussels sprouts, cabbage, carrots, cauliflower, celery, sweet corn, cucumbers, eggplant, escarole-endive, garlic, lettuce, bell peppers, onions, spinach, tomatoes, and melons. 2/ Includes asparagus, lima beans, snap beans, broccoli, beets, cabbage, carrots, cauliflower, sweet corn, cucumbers, green peas, spinach, and tomatoes.

Source: USDA, Economic Research Service.

Supplies To Tighten, Prices To Rise

Supplies of U.S. dry edible beans in 2003/04 will be smaller than a year ago. With the industry indicating relatively modest carryover stocks for most classes and imports traditionally low, the small 2003 crop will leave supplies down and prices up. Given average domestic and export demand, stocks of several bean classes are likely to be relatively low by next summer. Stocks of black beans and navy beans are expected to sink to minimal levels by the end of the marketing year. Assuming good export demand, pinto beans could begin 2004/05 with stocks similar to the lows of 2 years ago.

Lower supplies and slowly rising prices this coming winter and spring could provide interesting challenges for some growers regarding planting decisions next spring. This will be especially true in soybean areas with U.S. season average soybean prices approaching or exceeding \$7 per bushel for the first time since 1996. Average prices for wheat and corn in 2003/04, although expected to be lower than a year earlier, will likely exceed the low levels of 2001/02.

Production Estimates Revised, Estimates by Class Released

The USDA estimate of 2003 U.S. dry edible bean production was reduced this month to 22.8 million cwt--24 percent below the crop of a year ago. Harvested area was down 21 percent from a year ago and yield was 3 percent lower. The national average yield of 16.78 cwt per acre was virtually the same as the estimated 40-year trend. The largest reduction in output from a year earlier occurred in Michigan (down 50 percent), where area planted was a record low 170,000 acres. Output was also reduced in Washington (down 36 percent) and North

Table 10--U.S. dry beans: Production by class, 2001-2003

Item	2001	2002	2003	Percent
				change
--1,000 cwt--				
				Percent
Pinto	8,721	12,880	10,650	-17.3
Navy	2,311	5,304	2,531	-52.3
Great Northern	2,108	1,545	2,186	41.5
Black	783	3,114	1,262	-59.5
Lt red kidney	776	1,199	1,107	-7.7
Dk red kidney	727	1,075	850	-20.9
Blackeye	553	543	746	37.4
Pink	326	607	654	7.7
Small red	172	605	614	1.5
Garbanzo	1,612	838	428	-48.9
Baby lima	235	501	400	-20.2
Large lima	326	334	374	12.0
Cranberry	147	359	188	-47.6
Others	786	1,070	857	-19.9
United States	19,583	29,974	22,847	-23.8

Source: National Agricultural Statistics Service, USDA.

Dakota (down 27 percent). Increases in output were noted in several smaller producing States such as New York (up 34 percent) and Wyoming (up 19 percent).

The first estimate of dry bean production by class was released by USDA on December 11 (table 10). Output was reduced for 8 of the 13 identified classes. Among the 5 classes with larger output, gains in Great Northern (up 41 percent) and blackeye beans (up 37 percent), were most notable. The largest percentage decline among the major classes was in black beans—down nearly 60 percent. Output of pinto beans, which accounts for the largest share (47 percent) of the U.S. dry bean crop, fell 17 percent. Output of navy beans, the second largest class, plummeted 52 percent, and garbanzo beans were down 49 percent. Output of Great Northern beans jumped as a 17-percent increase in

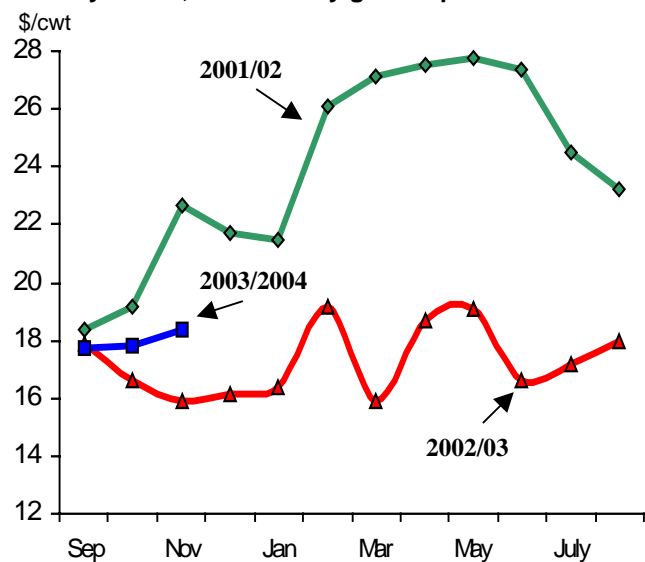
Table 9--U.S. dry beans: Monthly grower prices for selected classes, 2002-2003

Commodity	2002			2003			Change from prev year		
	Sept.	Oct.	Nov.	Sept.	Oct.	Nov.	Sept.	Oct.	Nov.
Cents/pound							--- Percent ---		
All dry beans	17.90	16.60	15.90	17.70	17.80	18.40	-1.1	7.2	15.7
Pinto (ND/MN)	15.38	14.50	14.00	15.60	14.50	14.50	1.4	0.0	3.6
Navy (pea bean) (MI)	13.75	12.50	11.00	16.00	16.50	17.67	16.4	32.0	60.6
Great Northern (NE/WY)	20.00	18.70	18.00	17.28	15.88	15.33	-13.6	-15.1	-14.8
Black (MI)	14.00	12.00	11.50	17.50	17.69	18.25	25.0	--	58.7
Light red kidney (MI)	22.00	22.00	21.50	22.63	23.30	24.50	2.9	5.9	14.0
Dark red kidney (MN/WI)	20.33	18.50	17.00	22.20	21.38	21.00	9.2	--	23.5
Small red (ID)	20.50	20.00	20.00	21.40	21.00	21.00	4.4	5.0	5.0
Baby lima (CA)	31.75	31.20	30.25	30.00	30.00	30.00	-5.5	-3.8	-0.8
Large lima (CA)	40.88	41.00	41.00	41.33	41.69	41.00	1.1	1.7	0.0
Blackeye (CA)	29.75	31.45	31.38	--	--	28.33	--	--	-9.7
Pink (ID)	20.50	20.00	20.00	20.50	20.50	20.00	0.0	2.5	0.0

-- = not available. Source: *Bean Market News*, AMS, USDA.

Figure 6

U.S. dry beans, all: Monthly grower prices



Source: National Agricultural Statistics Service, USDA.

Nebraska’s area harvested was joined by a 16-percent rise in yield. With national dry bean yields performing at trend levels, most of the cutback in dry bean output this year was prompted by economics—i.e., low bean prices relative to other crops.

Production of black beans plummeted because of a 56-percent cut in harvested area (particularly in Michigan and New York) was compounded by an 8-percent reduction in yields. Although last year’s crop was the third largest on record, stocks coming into this year were relatively modest, contributing to early grower price strength. November grower prices for black beans were nearly 60 percent greater than a year earlier.

Dry Bean Exports Up Through October

Despite the small crop, U.S. dry edible bean export volume during the first 2 months (September and October) of the 2003/04 marketing year was up 14 percent from the same time a year earlier. Black beans (up 227 percent), Great Northern beans (up 186 percent), and small red beans (160 percent) led the increase. Greater shipments to Iraq, the Dominican Republic, Haiti, and Zambia, plus larger sales to Mexico (up 58 percent) were the driving force behind early dry bean exports in 2003/04.

Despite sluggish dry bean markets early in the season, imports (excluding guar seeds) during September-October were up 12 percent, led by pinto beans (up 507 percent). Over the past decade, imports have slowly gained a foothold in several U.S. dry bean markets, with the share of total dry bean consumption accounted for by imports about doubling from more than 4 percent in 1990-92 to 9 percent during 2000-02.

Navy Beans Down, Prices Rise

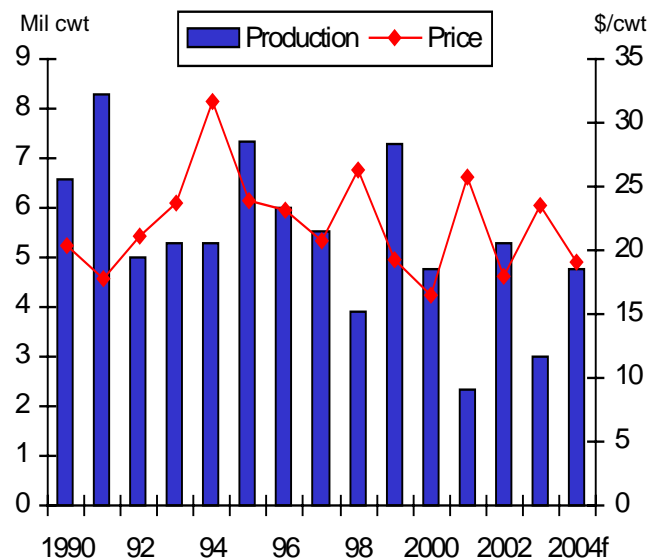
As expected, navy (pea) bean production in 2003 has dropped. Output was down in every State but Wyoming, with industry-leader North Dakota’s crop down 50 percent and Michigan’s crop down 63 percent to the second smallest on record. Navy bean production in Michigan was slashed as acres harvested fell 55 percent and average yield declined 19 percent. In North Dakota, navy bean yields improved 6 percent from a year earlier, while harvested area dropped 53 percent as growers turned to other crops.

The smaller crop means 2003/04 navy bean supplies are substantially reduced. As a result, navy bean prices have strengthened and should continue to gain as the marketing year progresses. Michigan navy bean grower prices began the marketing year in September at \$16.00 per cwt—up 16 percent from a year earlier. Prices had climbed to \$17.50 by mid-December—59 percent above last December’s low levels. With marketable stocks expected to be nearly exhausted by the close of the marketing year and prices likely to move higher, the stage is set for a substantial increase in area and production in 2004.

Navy bean exports improved in 2002/03, with volume up 5 percent from a year earlier. Increased movement to Canada, South Africa, and Australia outweighed reduced movement to the UK (down 13 percent), New Zealand (no sales), Italy (down 67 percent), and Mexico (down 32 percent). In the coming year, exports are expected to decline due to short supplies. Exports accounted for about 24 percent of supplies in 2003—the same share averaged during the 1990s.

Figure 7

U.S. navy beans: Production and dealer price



f = ERS forecast. Sources: NASS, USDA and AMS, USDA.

Commodity Highlight: Carrots

Carrots, a cool-season crop, are members of the parsley family and are thought to have originated in western Asia near Afghanistan. Early European settlers brought carrot seeds to America. Virtually devoid of fat, carrots are also low in calories and sodium and provide dietary fiber, potassium, and vitamin C. However, the carrot's main nutritional claim to fame is as a leading source of several carotenoids, particularly beta-carotene, which the body converts to vitamin A. Vitamin A is essential for such things as vision, regulation of cell development, healthy skin, and immune system response.

Domestic fresh carrot consumption has increased substantially over the past 2 decades. Excluding melons, carrots are now the fifth most consumed fresh vegetable in the United States. Consumer surveys have shown that carrots are eaten for a variety of reasons including taste, convenience, and various health-related reasons such as cancer prevention, vitamin/mineral intake, calorie control, and fiber. Driven by these factors, use of fresh-market carrots averaged 10.2 pounds per capita during 2000-2002—up 26 percent from 1990-92 and 62 percent above 1980-82.

Despite the long-term rise, average use of fresh-market carrots has steadily declined since peaking at a record 13.1 pounds during 1996-98. Carrot use had steadily risen to that point after falling to 5.5 pounds during 1977-79. The reasons for reduced use are not clear, but may reflect the efficiency of fresh-cut products, which has likely led to less waste throughout the production and marketing channel. This in turn may have reduced the total volume of product required at the farm level, even as the incidence of carrot consumption may have risen. Similar consumption trends have been noted for other vegetables with fresh-cut sectors such as head lettuce and broccoli.

The United States produces 8 percent of the world's carrots--second behind China and just ahead of Russia.

Table 12--Fresh-market carrots: World production

Item	1995	2001	2002	Change
				2001-02
			--Million cwt--	Percent
China	80.6	134.7	145.8	8.2
United States	41.4	40.5	36.9	-8.8
Russia	26.1	32.6	33.5	2.8
Poland	18.0	20.3	19.8	-2.5
United Kingdom	11.4	13.6	15.4	13.2
Others	187.1	216.4	212.2	-2.0
World	364.6	458.1	463.6	1.2

Source: Food and Agriculture Organization, United Nations.

According to the Census of Agriculture, carrots were produced on 1,865 farms in 1997—down 9 percent from 1992 but 18 percent higher than reported in the 1987 census. Fresh-market carrots account for 72 percent of all U.S. carrot output. During the 2000-02 period, California (with year-round output) accounted for 76 percent of the fresh-market carrot crop, followed by Colorado (6 percent) and Michigan (5 percent). USDA production statistics group fresh-cut products with fresh-market statistics.

In the United States, carrot production is highly mechanized. With few exceptions, carrots for both fresh and processing use are machine harvested, although the varieties used for each market tend to differ. The shipping side of the fresh carrot market is highly concentrated, with the two largest California firms accounting for the majority of the products sold.

The United States is a net exporter of fresh-market carrots. In 2002, more than 11 percent of supplies were exported (mostly to Canada)—up from less than 7 percent during the 1990s and the largest share on record. Meanwhile, 7 percent of consumption was satisfied by imports (largely from Canada and Mexico) in 2002—up from 6 percent during the 1990s.

Table 11--U.S. fresh-market carrots: 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 --	-- \$/cwt --	
1980	1,393.2	108.7	1,501.9	101.2	1,400.7	6.15	11.30	19.69
1990	2,110.6	122.1	2,232.7	158.7	2,074.0	8.29	11.90	13.76
1998	3,593.5	179.2	3,772.7	255.5	3,517.2	12.74	12.00	11.63
1999	3,130.0	184.8	3,314.8	262.3	3,052.5	10.93	16.80	16.05
2000	3,059.8	167.5	3,227.3	276.5	2,950.8	10.47	13.10	12.26
2001	3,146.4	201.4	3,347.8	309.1	3,038.7	10.64	17.20	15.72
2002	2,902.7	190.2	3,092.9	351.6	2,741.3	9.50	19.00	17.17
2003 f	2,880.0	200.1	3,080.1	312.4	2,767.7	9.49	--	--
2004 f	2,975.0	197.2	3,172.2	324.4	2,847.8	9.66	--	--

-- = Not available. f = ERS forecast. 1/ Source: National Agricultural Statistics Service, USDA. 2/ Source: Bureau of the Census, U.S. Department of Commerce. For 1980, exports were adjusted by ERS using Canadian import data. 3/ Constant dollar prices were calculated using the GDP deflator, 1996=100.

U.S. food and agriculture: Today and beyond

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For registration and other details:

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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. Produce, Food Safety, and International Trade

<http://www.ers.usda.gov/publications/aer828/aer828g.pdf>

Reviews the private and public responses to food safety problems of imported produce by examining three cases: Guatemalan raspberries, Mexican strawberries, and Mexican cantaloupe. Outbreaks of foodborne illness associated with imports affect U.S. consumers, growers of the contaminated product, and frequently U.S. producers. While the three cases focus on fruit, the lessons learned also apply to vegetables.

2. 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.

3. 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.

4. U.S. Fresh Produce Markets: Marketing Channels, Trade Practices, and Retail Pricing Behavior

<http://www.ers.usda.gov/publications/aer825/>

Synthesizes results of a multiphase project that examined the dynamics of produce markets, produce shipper-retailer relationships, and the relative market influence of producers, retailers, and consumers. In the past decade, retail consolidation, changing consumer demand, marketing practices, and new technology have transformed U.S. fresh fruit and vegetable markets. For additional information, see the [ERS produce markets project](#) page in the Food Market Structures briefing room.

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Potatoes, sweet potatoes, long-run outlook

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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>

Data Tables (continued)

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>

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/>

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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	654	572	718	905	873	785	795	862	956	834	963	768	807
	2001	815	987	920	915	953	796	828	960	895	681	675	1,006	869
	2002	1,055	1,270	1,807	808	801	740	779	799	791	711	776	1,030	947
	2003	766	751	811	906	942	1,021	792	933	969	967	1,064		
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	622	647	718	701	748	802	856	684	528	471	529	547	654
	2003	549	561	555	630	604	539	539	531	438	419	458		
--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	135	131	117	119	129	143	125	144	115	121
	2001	122	148	138	137	143	119	124	144	134	102	101	151	130
	2002	158	190	270	121	120	111	117	120	118	106	116	154	142
	2003	115	112	121	136	141	153	118	140	145	145	159		
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	128	142	138	148	158	169	135	104	93	105	108	129
	2003	108	111	110	124	119	107	106	105	86	83	90		

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	167.7	165.0	138.8	133.3	138.6	173.9	156.9	148.2		
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	129.0	128.9	129.3	129.4	129.3	129.4	129.2	129.2	130.9	131.0		
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	125.7	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	132.6	131.1
	2003	133.4	134.1	133.3	134.0	134.1	133.9	134.9	133.8	133.9	135.2	135.0		
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	183.5	186.3
	2003	182.3	181.2	180.2	178.2	177.2	176.5	174.5	160.1	158.4	156.2	155.9		

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, Nov.
															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	6.7
	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	1.1
	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	3.8
	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	-8.6
	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	16.8
	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	15.4
	2003	48.3	47.2	46.3	46.6	46.6	46.2	46.4	46.4	44.4	44.1	43.8			-7.4
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	8.5
	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	1.3
	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	-1.5
	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	8.4
	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	-17.3
	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	29.9
	2003	112.2	110.1	119.9	113.9	115.1	112.7	113.3	109.3	130.3	135.8	131.2			12.6
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	35.4
	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	-24.3
	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	-11.5
	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	14.3
	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	-5.2
	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	2.7
	2003	73.4	68.2	65.5	72.3	79.5	83.2	80.8	70.9	89.8	85.8	92.7			22.9
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	15.9
	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	23.3
	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	-23.0
	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	15.6
	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	-2.3
	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	-2.6
	2003	171.1	156.5	161.9	155.5	140.1	139.8	146.0	151.3	143.8	143.6	148.0			3.5

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 \$/lb	6/10 \$/case
-- \$/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	14.00	8.00	11.13	9.00	15.42	8.63	11.50	9.00	12.00	0.32	18.46
II p	8.00	14.00	8.00	11.38	9.00	15.50	8.71	11.67	9.00	12.00	0.30	19.46
III p	8.00	14.00	8.00	11.75	9.00	16.00	8.63	11.50	9.00	12.00	0.29	19.50
IV f	8.00	14.00	8.00	12.00	9.00	16.13	8.40	11.37	9.00	12.00	0.30	19.00
Average	8.00	14.00	8.00	11.57	9.00	15.76	8.59	11.51	9.00	12.00	0.30	19.11

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	6.93	0.52	6.90	0.50	6.88	0.55	5.83	0.45	10.15	0.72	8.30	0.45
II p	6.93	0.52	6.90	0.50	6.88	0.55	5.83	0.45	10.15	0.72	8.30	0.45
III f	6.93	0.52	6.90	0.50	6.88	0.55	5.83	0.45	10.15	0.72	8.30	0.45
IV f	6.93	0.52	6.90	0.50	6.88	0.55	5.83	0.45	10.15	0.72	8.30	0.45
Average	6.93	0.52	6.90	0.50	6.88	0.55	5.83	0.45	10.15	0.72	8.30	0.45

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 9--Potatoes and pulses: Prices received by U.S. growers, by month, 1994-2003 1/

Item	Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Season
														average
--\$/cwt--														
Potatoes, all uses	1994	6.04	6.37	7.75	6.68	6.62	6.80	7.38	6.25	4.95	4.57	4.77	4.85	5.56
	1995	4.83	4.97	5.37	5.41	5.86	7.12	8.75	6.64	5.76	6.30	6.39	6.33	6.75
	1996	6.65	6.92	7.51	7.82	8.09	8.16	7.79	5.58	4.92	4.75	4.44	4.28	4.91
	1997	4.22	4.56	4.64	4.67	5.31	5.67	5.66	6.31	5.08	4.93	5.12	5.36	5.64
	1998	5.40	5.94	6.41	6.27	6.45	6.16	5.81	5.46	4.97	4.47	4.86	5.30	5.56
	1999	5.50	5.75	6.12	6.50	6.13	6.54	7.35	6.02	5.09	4.86	5.52	5.44	5.77
	2000	5.67	5.91	6.26	6.54	6.30	6.17	6.95	5.53	4.65	4.32	4.31	4.59	5.08
	2001	4.73	5.28	5.12	5.47	5.22	5.71	6.37	7.61	6.04	5.15	5.96	6.66	6.99
	2002	7.31	7.31	8.22	7.97	8.63	9.45	10.80	7.55	6.14	5.44	6.38	6.67	6.69
	2003	6.67	6.55	6.68	7.49	7.15	6.47	6.43	6.22	4.93	4.67	5.17		
Potatoes, table stock	1994	7.14	8.03	10.60	7.90	8.58	8.14	8.90	8.63	5.58	4.95	5.08	5.03	6.87
	1995	4.70	5.43	5.84	5.97	7.26	9.85	10.70	9.63	9.31	8.00	7.87	7.54	8.87
	1996	7.99	8.52	8.85	9.01	9.78	10.50	9.74	7.06	5.82	5.31	4.02	3.73	5.05
	1997	3.21	3.82	3.46	3.92	4.60	5.34	7.02	9.04	7.02	6.65	6.07	6.05	6.65
	1998	5.76	6.81	7.54	6.84	7.29	7.24	6.99	6.74	6.31	5.44	5.46	5.62	6.94
	1999	6.07	6.93	7.50	8.39	7.89	9.09	9.85	9.88	6.94	6.00	6.57	6.22	6.94
	2000	6.32	6.71	6.77	7.17	7.18	7.45	9.36	8.49	4.92	4.04	3.80	4.00	5.27
	2001	4.38	5.41	4.50	5.50	7.23	8.36	8.94	13.50	10.20	8.13	8.28	9.22	10.79
	2002	10.40	11.50	13.10	12.00	14.70	16.30	16.70	15.30	10.80	7.99	8.83	8.65	9.23
	2003	8.40	8.36	7.96	9.37	9.27	7.79	8.34	9.22	6.29	5.70			
Potatoes, processing	1994	5.08	5.12	5.43	4.96	4.79	5.50	4.95	4.91	4.80	4.51	4.56	4.75	4.83
	1995	4.89	4.90	4.80	4.76	4.82	5.07	5.80	4.98	4.90	4.65	5.37	5.39	5.21
	1996	5.42	5.44	5.71	5.87	6.59	6.47	5.92	4.91	4.67	4.67	4.67	4.77	4.82
	1997	4.98	4.90	5.11	5.02	6.04	5.04	4.33	4.81	4.61	4.60	4.71	4.96	5.00
	1998	5.06	5.25	5.24	5.49	5.97	5.58	5.04	4.93	4.49	4.28	4.52	5.07	4.86
	1999	5.11	4.94	5.07	5.29	5.37	5.30	5.28	4.58	4.61	4.64	4.97	4.86	4.99
	2000	5.24	5.31	5.26	5.42	5.39	5.32	4.92	4.58	4.40	4.30	4.67	4.85	4.70
	2001	4.95	5.15	5.10	5.19	5.09	4.96	5.24	4.73	4.58	4.42	4.77	5.04	5.05
	2002	5.47	5.34	5.40	5.71	6.03	5.92	6.12	4.97	4.88	4.91	5.22	5.52	5.23
	2003	5.46	5.37	5.33	5.72	5.63	5.52	5.32	4.89	4.49	4.39			
Dry edible beans	1994	25.90	25.40	26.20	26.10	25.60	25.00	26.10	25.40	21.10	23.50	22.60	22.20	22.50
	1995	22.30	21.10	21.30	23.60	25.30	24.10	24.00	23.00	18.30	19.10	19.50	20.60	20.80
	1996	19.60	19.90	19.90	22.70	24.80	25.80	26.80	26.90	24.40	24.00	25.10	24.10	23.50
	1997	23.20	23.60	23.30	23.00	22.20	21.20	21.90	20.40	16.20	16.90	18.60	20.30	19.30
	1998	21.10	21.20	20.20	20.80	20.80	20.90	21.30	19.60	19.00	19.40	20.30	19.90	19.00
	1999	19.70	18.30	17.00	16.60	19.90	18.90	18.50	18.00	18.00	17.10	17.20	16.10	16.40
	2000	15.80	15.60	14.50	15.70	16.20	14.70	14.20	13.80	15.50	15.70	15.50	14.40	15.50
	2001	15.10	15.30	14.90	15.60	16.90	16.40	16.80	17.40	18.40	19.20	22.70	21.70	22.10
	2002	21.50	26.10	27.10	27.50	27.80	27.40	24.50	23.20	17.90	16.60	15.90	16.10	17.10
	2003	16.40	19.20	15.90	18.70	19.10	16.60	17.20	18.00	17.70	17.80	18.40		
Green peas, whole-dry	1994	6.50	6.55	6.90	7.00	7.25	7.60	8.00	8.25	8.30	8.80	9.95	11.00	11.30
	1995	12.05	12.90	13.40	13.50	13.60	13.00	9.50	9.30	9.00	8.35	8.25	8.25	9.64
	1996	8.30	8.75	9.50	9.95	10.15	10.85	11.65	12.50	12.30	11.00	11.00	11.00	11.60
	1997	11.50	12.60	14.25	13.80	13.00	11.90	9.00	7.70	7.65	7.90	8.00	8.00	7.82
	1998	8.00	8.00	8.00	7.95	7.75	7.75	7.70	6.85	6.15	6.00	6.19	6.31	6.48
	1999	6.46	6.50	6.53	6.56	6.75	6.88	6.91	6.53	6.22	6.03	6.03	5.83	5.76
	2000	5.79	5.78	5.78	5.69	5.68	5.59	5.41	5.25	5.13	5.20	5.38	5.50	5.95
	2001	5.84	6.28	6.44	6.53	6.43	6.28	6.25	6.19	6.21	6.35	6.56	6.88	6.96
	2002	7.04	7.06	7.13	7.40	7.25	7.25	7.25	7.13	7.38	7.68	7.91	8.33	9.08
	2003	9.08	9.81	10.88	10.60	10.44	9.92	9.30	7.56	7.60	8.09	8.79		
Yellow peas, whole-dry	1994	8.70	8.75	8.65	8.50	8.30	8.00	8.05	8.45	8.25	8.75	9.40	9.90	9.45
	1995	9.80	9.50	9.55	9.65	10.00	9.75	9.50	9.50	9.20	8.85	8.75	8.75	9.54
	1996	8.75	9.50	8.80	9.05	9.30	10.40	11.00	12.00	12.25	11.00	11.00	11.00	11.08
	1997	11.40	12.50	13.60	12.80	11.75	10.40	8.50	7.60	7.55	7.60	7.75	7.60	7.46
	1998	7.50	7.50	7.60	7.50	7.50	7.50	7.05	6.50	5.65	5.69	5.78	5.94	6.13
	1999	6.00	6.06	6.35	6.19	6.38	6.30	6.50	6.75	6.34	6.25	6.33	6.29	6.05
	2000	6.38	6.13	6.03	6.00	5.88	5.91	5.72	5.30	5.16	5.15	5.31	5.38	5.92
	2001	5.81	6.31	6.44	6.38	6.40	6.25	6.25	6.19	6.17	6.25	6.56	6.79	7.02
	2002	7.04	7.25	7.31	7.68	7.66	7.59	7.38	6.50	6.72	7.10	7.34	7.58	7.78
	2003	7.42	7.94	8.03	8.50	8.75	8.83	8.44	6.63	6.43	6.75	7.46		
Lentils, regular (Brewer)	1994	14.80	14.95	15.60	14.60	13.80	13.55	13.10	13.30	13.00	13.65	13.40	13.35	13.80
	1995	13.25	13.05	13.25	13.65	13.65	13.50	15.40	16.70	16.50	16.10	15.75	15.75	16.80
	1996	15.50	15.50	15.50	15.70	17.25	19.00	19.75	20.60	19.75	18.50	18.15	17.25	17.10
	1997	17.00	17.40	17.50	17.00	16.50	16.25	16.00	14.75	13.80	12.90	12.10	11.50	13.00
	1998	11.40	12.00	11.60	11.10	10.75	11.00	12.00	11.30	10.15	10.70	10.81	10.94	11.21
	1999	10.92	11.25	11.55	11.38	11.69	11.90	11.94	12.15	12.13	12.28	13.05	13.17	12.54
	2000	12.88	12.45	12.13	12.31	12.73	12.81	12.81	11.75	11.19	11.03	10.97	10.88	10.44
	2001	10.84	10.50	10.22	10.25	9.90	9.91	9.78	9.84	9.81	9.75	9.80	9.70	9.52
	2002	9.44	9.06	9.03	9.75	9.59	9.44	9.40	9.50	10.75	12.85	13.81	14.25	15.67
	2003	15.25	17.88	18.56	18.70	18.63	18.25	14.63	14.50	14.85	16.50	17.00		

1/ Prices for 2003 are preliminary.

Sources: National Agricultural Statistics Service, USDA, and Agricultural Marketing Service, USDA.

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

Herb	Unit	2002			2003			2002-03 Change		
		Sept.	Oct.	Nov.	Sept.	Oct.	Nov.	Sept.	Oct.	Nov.
								---	Percent	---
Anise	24-ct crtn	12.50	10.50	11.00	15.83	15.50	11.50	26.6	47.6	4.5
Arrugula	12-ct ctns	8.00	8.00	8.00	7.75	7.75	7.75	- 3.1	- 3.1	- 3.1
Basil	30-ct ctns	7.00	7.25	8.00	7.50	7.50	7.00	7.1	3.4	- 12.5
Celeriac	12-ct ctns	15.00	10.50	10.50	10.50	10.50	10.50	- 30.0	.0	.0
Chervil	12-ct flmbag	7.00	7.00	7.50	7.25	7.50	7.50	3.6	7.1	.0
Chives	12-ct flmbag	5.25	5.25	5.25	5.00	5.00	5.00	- 4.8	- 4.8	- 4.8
Cilantro	30-ct ctns	12.00	12.50	8.00	14.12	11.00	12.00	17.7	- 12.0	50.0
Dill	12-ct ctns	7.00	7.00	7.00	7.29	6.38	7.00	4.1	- 8.9	.0
Horseradish	50-lb sack	2.00	2.00	2.00	2.00	2.00	2.00	.0	.0	.0
Oregano	12-ct flmbag	6.25	6.25	6.25	6.25	6.00	6.00	.0	- 4.0	- 4.0
Rosemary	12-ct flmbag	6.25	6.25	6.25	6.00	6.00	6.00	- 4.0	- 4.0	- 4.0
Mint	12-ct ctns	7.05	7.00	7.75	7.38	7.50	7.25	4.7	7.1	- 6.5
Salsify	5-1kg flmbg	22.00	--	--	17.50	17.50	17.50	- 20.5	--	--
Thyme	12-ct flmbag	6.50	6.50	6.50	6.00	6.00	6.00	- 7.7	- 7.7	- 7.7
Sage	12-ct flmbag	6.25	6.25	6.25	6.00	6.00	6.00	- 4.0	- 4.0	- 4.0
Watercress	12-ct ctns	8.25	7.75	8.00	7.50	7.50	7.50	- 9.1	- 3.2	- 6.3

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

Price table 11--Farm-retail price spreads, 2000-03

	Annual			2002	2003					
	2000	2001	2002	Sep	Apr	May	Jun	Jul	Aug	Sep
Market basket¹										
Retail cost (1982-84=100)	170.6	177.2	180.3	179.9	182.4	183.3	184.4	184.8	185.5	186.3
Farm value (1982-84=100)	96.9	106.2	104.3	102.8	106.8	107.4	108.0	108.0	111.9	112.4
Farm-retail spread (1982-84=100)	210.3	215.4	221.2	221.4	223.1	224.1	225.6	226.2	225.2	226.1
Farm value-retail cost (%)	19.9	21.0	20.3	20.0	20.5	20.5	20.5	20.5	21.1	21.1
Fresh fruit										
Retail cost (1982-84=100)	284.3	291.7	298.0	299.9	302.6	314.1	311.7	312.0	308.3	308.6
Farm value (1982-84=100)	141.3	145.7	154.4	158.9	153.8	166.2	167.8	164.0	169.8	153.1
Farm-retail spread (1982-84=100)	350.3	359.1	364.2	365.0	371.3	382.4	378.2	380.3	372.2	380.4
Farm value-retail cost (%)	15.7	15.8	16.4	16.7	16.1	16.7	17.0	16.6	17.4	15.7
Fresh vegetables										
Retail cost (1982-84=100)	219.4	230.6	245.4	236.1	244.3	246.3	250.5	248.3	245.4	247.2
Farm value (1982-84=100)	121.4	129.9	145.8	122.0	168.3	171.2	165.2	136.7	153.9	143.8
Farm-retail spread (1982-84=100)	269.8	282.4	296.6	294.7	283.4	284.9	294.4	305.7	292.4	300.4
Farm value-retail cost (%)	18.8	19.1	20.2	17.5	23.4	23.6	22.4	18.7	21.3	19.7
Processed fruits and vegetables										
Retail cost (1982-84=100)	153.6	159.3	166.2	170.5	168.6	173.5	173.8	174.0	174.7	172.1
Farm value (1982-84=100)	106.4	107.9	110.5	107.9	108.9	107.7	107.2	109.1	108.9	109.0
Farm-retail spread (1982-84=100)	168.3	175.3	183.6	190.0	187.2	194.0	194.6	194.3	195.2	191.8
Farm value-retail cost (%)	16.5	16.1	15.8	15.0	15.4	14.8	14.7	14.9	14.8	15.1
Fats and oils										
Retail cost (1982-84=100)	147.4	155.7	155.4	155.3	156.1	157.6	156.5	156.3	157.7	157.6
Farm value (1982-84=100)	80.9	76.9	91.7	98.6	108.6	114.6	108.4	102.7	97.6	108.2
Farm-retail spread (1982-84=100)	171.9	184.7	178.9	176.1	173.6	173.4	174.2	176.0	179.8	175.8
Farm value-retail cost (%)	14.8	13.3	15.9	17.1	18.7	19.6	18.6	17.7	16.6	18.5
Meat products										
Retail cost (1982-84=100)	150.4	159.3	160.3	159.9	164.1	164.0	166.6	168.0	169.2	171.0
Farm value (1982-84=100)	88.4	97.4	102.6	103.4	106.8	107.0	107.5	108.7	109.1	110.1
Farm-retail spread (1982-84=100)	214.0	222.8	219.5	217.9	222.9	222.5	227.3	228.8	230.9	233.5
Farm value-retail cost (%)	29.8	31.0	32.4	32.7	32.9	33.0	32.7	32.8	32.7	32.6
Dairy products										
Retail cost (1982-84=100)	160.7	167.1	168.1	166.3	165.8	165.4	163.9	164.7	167.5	170.3
Farm value (1982-84=100)	98.8	118.5	97.6	93.4	89.1	89.0	88.8	94.7	102.7	109.4
Farm-retail spread (1982-84=100)	217.7	211.8	233.1	233.5	236.5	235.8	233.1	229.2	227.2	226.5
Farm value-retail cost (%)	29.5	34.0	27.8	26.9	25.8	25.8	26.0	27.6	29.4	30.8
Poultry										
Retail cost (1982-84=100)	159.8	164.9	167.0	167.8	168.2	165.9	167.7	168.9	169.0	169.7
Farm value (1982-84=100)	117.4	126.2	102.0	99.2	101.0	108.5	114.2	113.6	113.2	114.9
Farm-retail spread (1982-84=100)	208.7	209.3	242.0	246.8	245.6	231.6	229.3	232.6	233.3	232.9
Farm value-retail cost (%)	39.3	41.0	32.7	31.6	32.1	35.1	36.5	36.0	35.8	36.2
Eggs										
Retail cost (1982-84=100)	131.9	136.4	138.2	136.1	147.9	142.9	148.7	149.6	158.0	161.9
Farm value (1982-84=100)	80.6	74.3	72.1	67.0	89.4	68.2	85.8	90.1	115.0	109.0
Farm-retail spread (1982-84=100)	223.9	248.0	256.9	260.2	253.0	277.0	261.8	256.6	235.3	257.0
Farm value-retail cost (%)	39.3	35.0	33.5	31.6	38.8	30.7	37.1	38.7	46.8	43.2
Cereal and bakery products										
Retail cost (1982-84=100)	188.3	193.8	198.0	198.4	201.9	203.0	203.7	204.5	204.5	203.5
Farm value (1982-84=100)	75.2	78.8	86.4	100.1	91.1	91.4	88.1	86.1	92.3	91.5
Farm-retail spread (1982-84=100)	204.0	209.9	213.6	212.1	217.4	218.6	219.8	221.0	220.2	219.1
Farm value-retail cost (%)	4.9	5.0	5.3	6.2	5.5	5.5	5.3	5.2	5.5	5.5

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: <http://www.ers.usda.gov/publications/agoutlook/aotables/oct2003/aotab08.xls>