



United States  
Department  
of Agriculture

VGS-307

Feb. 23, 2005



Electronic Outlook Report from the Economic Research Service

[www.ers.usda.gov](http://www.ers.usda.gov)

# Vegetables and Melons Outlook

Gary Lucier and Alberto Jerardo

## Acreage To Rise for Dry Beans, Dry Peas, and Lentils

Driven by the income security provided by the marketing loan program, favorable market prices for lentils, falling prices for alternative crops, relatively low input costs, and the long term benefits of having pulses in a crop rotation, U.S. dry pea and lentil growers are again expected to seed more acreage this spring than a year ago. Lentil area is projected to show a smaller increase than last year's 40 percent surge and area planted to dry peas (which jumped 57 percent in 2004) could rise more than a third this year as interest in these crops continues to expand beyond traditional growing areas.

Area planted to dry edible beans is expected to rise 20-30 percent this spring from last year's low 1.35 million acres. The main impetus for the expected gain in area is a combination of shrinking dry bean stocks, higher U.S. dry bean prices, and much lower prices for alternative crops such as soybeans and field corn.

Area planted to spring-season onions is estimated to have risen 1 percent in 2005 compared with a year earlier and is 12 percent higher than in 2003. The estimated 40,300 acres is the most planted since 2000 and follows a large and low-priced fall storage onion crop. The domestic spring onion crop will account for about 4 pounds of the estimated 20 pounds of fresh dry-bulb onions that the average American is expected to consume in 2005.

Acreage for harvest of fresh-market vegetables during the winter season (largely January-March) increased 2 percent from a year earlier. Although January shipping-point prices across all U.S. commercial vegetable production areas sunk 24 percent below a year earlier, prices in February and March are expected to return to more seasonal levels as supplies move more into line with demand.

With the exception of August, 2004 monthly prices received by U.S. growers for fresh potatoes were all lower than in 2003. Prices for processing potatoes, however, were about the same as in 2003. One reason for relatively stronger demand for processing potatoes was greater export volume in 2004 compared with fresh potato exports. Nevertheless, retail prices for frozen french fried potatoes and for potato chips were generally lower in 2004 than in 2003.

U.S. production of sweet potatoes during the 2004 crop year totaled 16.4 million hundred-weight (cwt)—3 percent larger than 2003's 15.9 million cwt and the largest crop since 1962. At 4.8 pounds, per capita use of sweet potatoes in 2004 was the highest since 1985. Increased domestic consumption of sweet potatoes is attributed not only to population growth, but also to increased demand from a more ethnically diverse population.

### Contents

[Industry Overview](#)  
[Fresh-Market Vegetables](#)  
[Processing Vegetables](#)  
[Potatoes](#)  
[Sweet Potatoes](#)  
[Dry Edible Beans](#)  
[Dry Peas & Lentils](#)  
[Mushrooms](#)  
[Commodity Highlight:](#)  
[Romaine Lettuce](#)  
[Contacts & Links](#)  
[Appendix Tables](#)

### Web Sites

[Veg. & Melons](#)  
[Potatoes](#)  
[Tomatoes](#)  
[Dry Beans](#)  
[Market News](#)  
[NASS Statistics](#)  
[FAS Horticulture](#)

-----  
The next release is  
April 21, 2005  
-----

Approved by the  
World Agricultural  
Outlook Board

# Industry Overview

**Fresh vegetables:** Assuming average weather over the next month, fresh vegetable shipping-point prices for the first quarter are expected to average 3 to 7 percent below those of a year earlier. The outlook for the spring season suggests reduced area and higher shipping-point prices compared with the lows of last spring.

**Processing vegetables:** According to an early intentions report, California tomato processors indicated they intend to contract for 9 percent fewer tons in 2005. Meanwhile, price trends and stock estimates suggest production of other canning vegetables could rise somewhat in 2005, while output of freezing vegetables (excluding potatoes) could decline slightly.

**Potatoes:** January fall potato stocks were the highest in 4 years and grower prices continue to average below those of a year earlier. As a result, forecasts suggest that U.S. potato growers could plant slightly fewer acres in 2005.

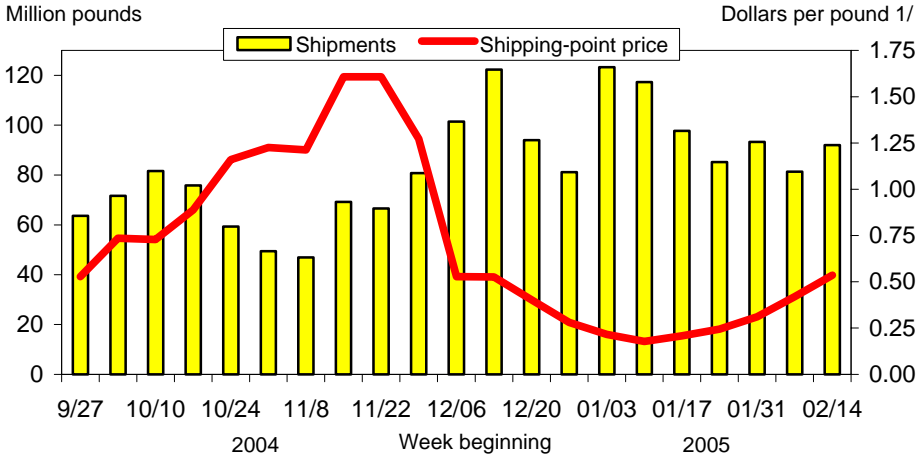
**Sweet potatoes:** After producing the largest crop since 1962 last year, ERS forecasts suggest that U.S. sweet potato growers will plant fewer acres in 2005. Domestic demand is edging higher and export markets continue to expand.

**Dry beans:** Driven by higher prices for several bean classes and lower prices for alternative crops, ERS forecasts suggest that U.S. dry bean growers could plant 20-30 percent more area in 2005. Although acreage gains could be tempered by reported shortages of some dry bean seed, prices are up and stocks of several bean classes will likely be low or exhausted by next summer.

**Dry peas and lentils:** Driven by good demand, continued strong lentil prices, and cash from loan deficiency payments (LDPs), growers of dry peas and lentils are expected to again increase planted area by double-digit rates in the coming season. Through mid-February, LDPs for 2004 crop dry peas totaled \$31 million—up from \$14 million for the 2003 crop.

**Mushrooms:** Through the first half of the 2004/05 marketing year, the volume of canned mushroom imports fell 1 percent to 67 million pounds despite China's share of U.S. canned imports reaching 33 percent—up from 24 percent a year earlier.

**U.S. fresh-market tomatoes: Weekly shipments & shipping-point price**



1/ Based on dollars per 25-pound carton of mature green tomatoes. Volume excludes grape and cherry tomatoes.

Source: Market News, Agricultural Marketing Service, USDA.

Table 1--U.S. vegetable industry: Area, production, crop value, unit value, trade, and per capita use, 2002-05

Item	Unit	2002	2003	2004	2005 1/
<i>Area harvested</i>	1,000 ac.	6,874	6,536	6,581	7,058
<i>Vegetables</i>					
Fresh & melons	1,000 ac.	1,931	1,927	1,947	1,950
Processing	1,000 ac.	1,340	1,337	1,291	1,275
Potatoes	1,000 ac.	1,266	1,249	1,168	1,165
Dry beans	1,000 ac.	1,739	1,347	1,219	1,475
Other 2/	1,000 ac.	599	677	955	1,193
<i>Production</i>	Mil. cwt	1,322	1,293	1,353	1,343
<i>Vegetables</i>					
Fresh & melons	Mil. cwt	461	466	483	485
Processing	Mil. cwt	343	314	356	338
Potatoes	Mil. cwt	458	458	456	452
Dry beans	Mil. cwt	30	22	18	24
Other 2/	Mil. cwt	29	32	41	45
<i>Crop value</i>	\$ mil.	15,508	15,528	15,560	15,640
<i>Vegetables</i>					
Fresh & melons	\$ mil.	9,359	9,773	9,737	9,800
Processing	\$ mil.	1,392	1,367	1,471	1,395
Potatoes	\$ mil.	3,045	2,686	2,564	2,568
Dry beans	\$ mil.	519	423	445	458
Other 2/	\$ mil.	1,193	1,278	1,343	1,420
<i>Unit value 3/</i>	\$/cwt	11.73	12.01	11.50	11.65
<i>Vegetables</i>					
Fresh & melons	\$/cwt	20.29	20.95	20.16	20.21
Processing	\$/cwt	4.06	4.36	4.14	4.13
Potatoes	\$/cwt	6.67	5.89	5.62	5.68
Dry beans	\$/cwt	17.10	18.40	24.80	19.47
Other 2/	\$/cwt	41.53	39.76	32.98	31.66
<i>Trade</i>					
<i>Imports</i>	\$ mil.	4,817	5,435	6,185	6,570
<i>Vegetables</i>					
Fresh & melons	\$ mil.	2,617	3,028	3,458	3,650
Processing	\$ mil.	1,189	1,276	1,448	1,550
Potatoes	\$ mil.	575	682	764	815
Dry beans	\$ mil.	67	49	65	80
Other 4/	\$ mil.	369	400	449	475
<i>Exports</i>	\$ mil.	3,273	3,313	3,468	3,560
<i>Vegetables</i>					
Fresh & melons	\$ mil.	1,203	1,302	1,364	1,415
Processing	\$ mil.	798	798	794	810
Potatoes	\$ mil.	723	646	735	750
Dry beans	\$ mil.	180	157	145	130
Other 4/	\$ mil.	369	410	432	455
<i>Per capita use</i>	Pounds	438	443	445	446
<i>Vegetables</i>					
Fresh & melons	Pounds	170	168	173	174
Processing	Pounds	120	120	121	121
Potatoes	Pounds	132	139	136	136
Dry beans	Pounds	7	7	6	6
Other 2/	Pounds	9	9	9	9

1/ ERS forecasts for 2005. 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. All trade data are on a calendar year basis.

Sources: ERS and National Agricultural Statistics Service, USDA.

## Fresh-Market Vegetables

### *Winter Acreage Up 2 Percent*

Acreage for harvest of fresh-market vegetables during the winter season (largely January-March) increased 2 percent from a year earlier. Shipments of cool-season winter crops (e.g. lettuce, broccoli, and cauliflower) from the California and Arizona desert regions got off to a rocky start this year due to cold, wet conditions. Despite unusually heavy rain in both the desert and the supporting production regions along California's south coast, market volume was strong into February and shipping-point prices were universally low during the entire first half of the winter. The heavy volume was due in part to good yields resulting from an extended period of above-normal temperatures in the California and Arizona desert areas, which set in after the initial heavy rains. The warmth accelerated harvests of leafy crops such as lettuce, broccoli, and cauliflower (among others) and caused some harvest "bunching", resulting in excess market supplies. As a result, there were reports of vegetable fields being abandoned (plowed under prior to harvest) in January due to the extended period of low shipping-point prices.

In a similar vein, strong supplies of warm-season crops (e.g. tomatoes, peppers, etc) from Florida and Mexico led to low shipping-point prices for these vegetables during the first half of the winter season. Although January shipping-point prices across all U.S. commercial vegetable production areas sunk 24 percent below a year earlier, prices in February and March are expected to return to more seasonal levels as supplies move more into line with demand. As a result, winter-quarter 2005 fresh-market shipping-point prices are expected to average 3 to 7 percent below those of a year earlier.

With temperatures remaining above freezing in most southern production regions this winter, fresh shipments of tomatoes and peppers from both Florida and Mexico had fully recovered from the fall-season shortages by early January. Field-grown tomato shipping-point prices, which peaked in November at a record \$1.24 per pound, began to decline in early December and into the first 2 weeks of January and averaged a very low 22 cents per pound during January (average cost of production

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

Item	2001	2002	2003	2004	2005	Change 2004-05
-- Acres for harvest --						
						Percent
Snap beans	11,000	12,000	11,600	12,000	11,500	-4
Broccoli	29,500	25,500	25,500	27,500	29,000	5
Cabbage	11,900	11,600	11,400	12,500	14,200	14
Carrots	25,000	20,300	20,500	21,100	21,700	3
Cauliflower	9,500	7,500	7,500	8,500	8,600	1
Celery	7,700	7,500	7,500	7,600	7,500	-1
Sweet corn	7,400	8,400	7,900	8,400	7,800	-7
Head lettuce	66,800	64,500	63,000	62,500	63,500	2
Bell pepper	4,400	5,600	5,800	6,100	6,300	3
Spinach	2,500	2,200	1,700	2,000	2,100	5
Tomatoes	14,000	12,500	12,600	13,000	12,500	-4
Total	189,700	177,600	175,000	181,200	184,700	2

1/ Selected crops for harvest largely during January-March.

Source: National Agricultural Statistics Service, USDA.

Table 3--Selected fresh-market vegetable trade volume, 2001-04

Item	January - December				Change
	2001	2002	2003	2004	2003-04
	--1,000 cwt--				Percent
<b>Exports, fresh:</b>					
Onions, dry bulb	7,083	6,372	6,790	6,201	-9
Lettuce, head	3,788	4,254	4,536	4,747	5
Lettuce, other	3,904	4,668	4,336	4,838	12
Broccoli	3,493	3,430	3,113	3,151	1
Tomatoes	3,982	3,321	3,142	3,675	17
Other	16,672	17,277	17,238	16,820	-2
Total	38,922	39,322	39,155	39,432	1
<b>Imports, fresh:</b>					
Tomatoes	18,156	18,962	20,711	20,546	-1
Cucumbers	8,115	8,457	9,003	9,335	4
Onions, dry bulb	6,326	5,954	6,461	6,892	7
Peppers, sweet	4,632	5,350	5,416	5,689	5
Squash *	3,818	4,077	4,758	4,948	4
Other	20,729	22,809	23,299	25,084	8
Total	61,777	65,609	69,648	72,495	4

\* Excludes chayote.

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

is 32 to 36 cents per pound). Over the past 5 years, fresh tomato prices averaged 38 cents per pound in January. The retail price for tomatoes, which tends to lag the shipping-point price by 4-6 weeks, reached a record-high \$2.47 per pound in December—exceeding the previous high set in February 1990 (\$2.36/lb). Retail prices began to ease in January, averaging \$1.66 per pound—up 13 percent from a year earlier.

### ***Imports and Exports Each Rise in 2004***

While the volume of fresh vegetable (excluding potatoes and melons) imports increased 4 percent in calendar 2004, import value rose 13 percent from a year earlier. Imports from Mexico (up 13 percent), Canada (14 percent), and Peru (23 percent) each increased. Together, Mexico and Canada accounted for 85 percent of U.S. fresh-market vegetable import value in 2004. Import volume increased for items such as onions (up 7 percent), bell peppers (5 percent), and cucumbers (4 percent), and declined for tomatoes (down 1 percent) and celery (17 percent).

While the volume of fresh vegetable exports increased 1 percent in calendar 2004, the value increased 6 percent to nearly \$1.3 billion. The value of fresh exports to Canada (6 percent) and Mexico (23 percent) each increased. Canada accounted for 77 percent of U.S. fresh-market vegetable exports in 2004—up slightly from 2003. The value of fresh exports to Japan (down 2 percent) declined for the fourth consecutive year. Export volume increased for items such as tomatoes (up 17 percent), leaf and romaine lettuce (12 percent), and head lettuce (5 percent), and declined for onions (down 9 percent), cabbage (13 percent), and carrots (15 percent).

### ***Spring Onion Area Up***

Area planted to spring-season onions is estimated to have risen 1 percent in 2005 compared with a year earlier and is 12 percent higher than in 2003. The 40,300 acres are the most planted since 2000 and follows a large and low-priced summer-fall onion crop. Among the four states, only Georgia planted fewer acres (down 9 percent) than a year ago. Given the expected decline in Vidalia onion area, Texas (up 5 percent) growers will have the most planted area this year. The crop is in

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

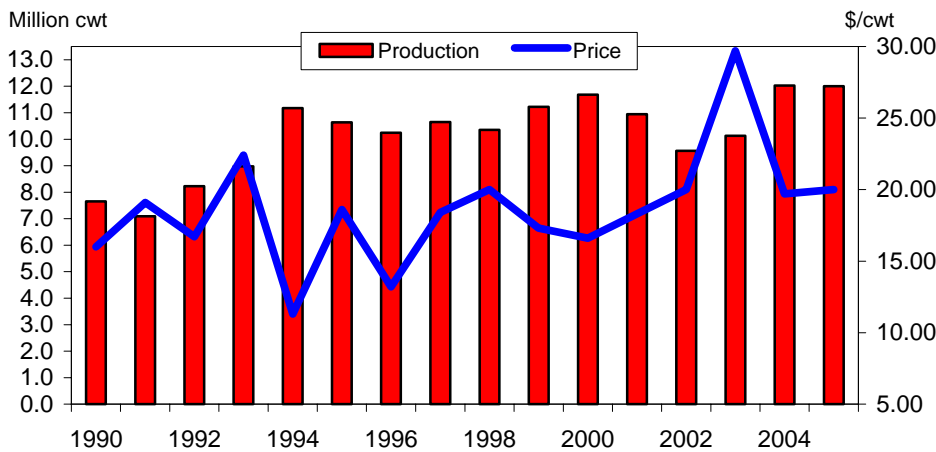
Item	Annual 2003	December 2004	January		Change previous:	
			2004	2005	Month	Year
		--1,000 cwt--			Percent	
Snap beans	2,871	272	237	184	-32	-22
Broccoli	9,122	999	949	937	-6	-1
Cabbage	13,424	1,440	1,292	1,417	-2	10
Cantaloup	29,211	1,007	1,073	920	-9	-14
Carrots	12,227	878	745	792	-10	6
Cauliflower	4,835	424	515	399	-6	-23
Celery	16,739	1,759	1,534	1,560	-11	2
Sweet corn	10,698	480	391	464	-3	19
Cucumbers	726	1,440	1,203	1,265	-12	5
Head lettuce	39,340	3,441	2,566	2,710	-21	6
Romaine	12,211	1,378	1,047	1,216	-12	16
Dry onions	46,172	4,399	3,710	4,037	-8	9
Bell peppers	14,656	1,363	1,248	1,539	13	23
Spinach	927	118	94	93	-21	-1
Tomatoes, round 2/	35,179	3,635	3,379	3,165	-13	-6
Tomatoes, roma	9,410	1,162	856	1,070	-8	25
Cherry tomatoes 3/	3,049	418	444	377	-10	-15
Watermelon	35,290	610	660	664	9	1
<b>Selected total</b>	<b>296,087</b>	<b>25,223</b>	<b>21,943</b>	<b>22,809</b>	<b>-10</b>	<b>4</b>

1/ All data are preliminary. Includes domestic and imported product. 2/ Includes both round and greenhouse produced tomatoes. 3/ Includes grape tomatoes.

Source: Market News, Agricultural Marketing Service, USDA.

Figure 2

**U.S. spring onions: Production and season-average price**



Source: National Agricultural Statistics Service, USDA except 2005 forecast by ERS.

generally good condition in all growing areas, with no weather or disease problems noted thus far.

Assuming no unusual weather or disease problems arise this spring, spring-season onion yields could reach trend levels (328 cwt). If trend yields are attained, they would be the fourth highest on record but would still be 3 percent below the strong yields experienced a year ago. Trend yields and average acreage abandonment (around 4,000 acres the past 5 years) would result in a crop similar to that of a year ago (12 million cwt). Onion prices--currently running a third lower than the favorable levels experienced last winter--will increase in the coming months as storage supplies are exhausted and the spring crop is marketed. The domestic

spring onion crop will account for about 4 pounds of the estimated 20 pounds of onions that the average American is expected to consume in 2005.

### ***Spring Fresh-Market Outlook***

The early outlook for spring-season fresh-market vegetable and melon area for harvest indicates a small decline from a year earlier as growers respond to generally lower prices received last spring and this winter. The official estimate of spring fresh vegetable area will be released by USDA on April 1.

Because of several incidences of torrential winter rains along California's South and Central Coasts, supply gaps for some leafy crops may appear during the early spring season. The heavy rains flooded fields and slowed or stopped planting and other field activities, which could throw off the harvest timing of many early spring vegetable crops. As a result, the spring season could begin with a period of high shipping-point prices for several commodities. If these gaps begin to appear around the Easter holiday period (which occurs earlier this year) when produce demand is usually strong, shipping-point prices could exhibit even stronger temporary surges. Although prices are expected to moderate as volume increases seasonally later in the Spring, shipping-point prices could average as much as a tenth above those of a year earlier during the April-June quarter.

### ***Fresh-Market Production Up 3 Percent in 2004***

According to USDA's *Vegetables* annual report, 2004 fresh-market vegetable production increased 3 percent from a year earlier to 485 million cwt. This was also 5 percent above the output of 2002. Production rose on the strength of improved yields plus a 1-percent gain in harvested area to 1.95 million acres. Although fresh-market output increased in only 18 of the 39 surveyed States, the top two producing States, California (up 3 percent) and Florida (up 8 percent) each produced more fresh vegetables despite weather setbacks this past fall. With larger volume, average prices fell in 2004, which pulled crop value down less than 1 percent to \$9.8 billion. California accounted for 53 percent of U.S. fresh-market vegetable crop value in 2004, with Florida a distant second at 12 percent.

Table 5--U.S. quarterly f.o.b. shipping-point prices, selected vegetables and melons, 2004-2005

Commodity	2004				2005				Change 1st Q 1/ Percent
	First	Second	Third	Fourth	First *	Second *	Third *	Fourth *	
	--- Dollars per 100 lb ---								
Asparagus	196.00	126.00	217.67	164.50	150.00	125.00	130.00	--	-23.5
Broccoli	27.90	26.60	36.97	43.87	29.00	29.00	31.00	38.00	3.9
Cantaloup	--	14.50	15.70	23.03	--	18.00	16.00	22.00	--
Carrots	24.67	23.87	18.30	17.27	19.75	20.00	18.00	18.00	-19.9
Cauliflower	31.23	32.87	28.17	44.07	33.00	35.00	29.00	39.00	5.7
Celery	19.70	14.80	10.84	15.47	20.00	20.00	13.00	15.00	1.5
Sweet corn	23.90	18.30	21.30	23.60	22.00	18.00	21.00	23.00	-7.9
Cucumbers	26.87	18.70	30.10	20.40	27.00	19.00	24.00	17.00	0.5
Lettuce, head	15.20	12.83	17.77	18.37	17.75	19.00	19.00	18.00	16.8
Onions, dry bulb	17.43	18.37	14.77	9.84	9.50	16.00	14.00	11.50	-45.5
Snap beans	54.07	37.80	63.90	59.97	56.50	41.00	60.00	52.00	4.5
Tomatoes, field	37.67	34.90	32.43	80.73	34.00	33.00	31.00	36.00	-9.7
All vegetables 2/	915	819	887	1,045	875	900	890	835	-4.4

-- = not available. \* = ERS forecast. 1/ Change for first-quarter 2005 over first-quarter 2004.

2/ Index base is 1910-14=100.

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

## Processing Vegetables

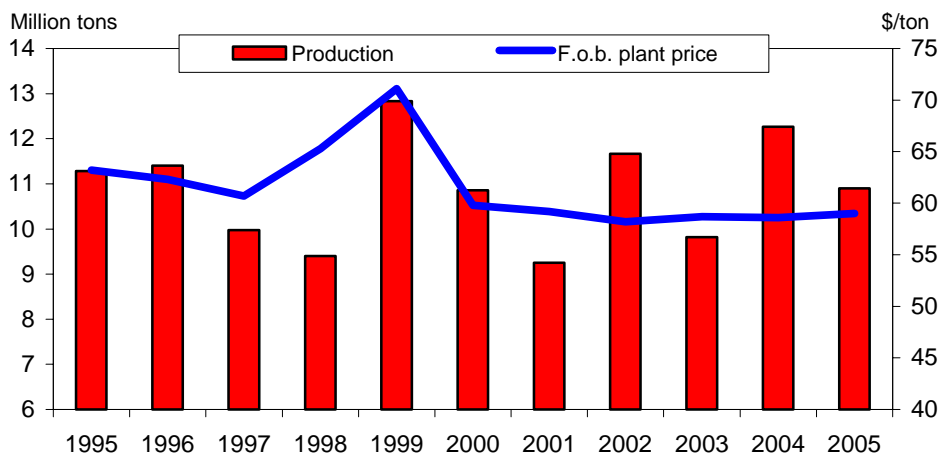
### Smaller Tomato Crop in Prospect

As expected, the early (Jan. 14) crop intentions report indicated that California tomato processors would likely contract for fewer tomatoes in 2005. California is the source for about 95 percent of the tomatoes grown nationally for processed products such as sauces, paste, soup, juice, and ketchup. California's tomato processors intend to contract for 9 percent fewer processing tomatoes than a year earlier—a total of 10.3 million short tons if they were to carry through with these early intentions. A trend yield of about 38.9 tons per acre was assumed, which would be second only to the 2004 record high of 40.8 tons. An additional 0.6 million tons would likely be processed from open market purchases and in other States. In 2004, 97 percent of the 12.3 million tons of tomatoes processed in the United States were grown under contract.

A smaller tomato crop is expected in 2005 due to larger domestic stocks (estimated to be the second highest on record on Jan. 1) and soft wholesale prices for tomato

Figure 3

#### U.S. processing tomatoes: Production & f.o.b. plant price



Source: NASS, USDA except 2005 forecast by ERS.

Table 6--Processing vegetables: Consumer and producer price indexes

Item	2005		2004		Change previous:	
	Jan.	Dec.	Jan.	Dec.	Month	Year
	-- Index --				-- Percent --	
<b>Consumer Price Indexes (12/97=100)</b>						
Processed fruits and vegetables	117.9	114.2	115.1		3.2	2.4
Canned vegetables	119.3	116.5	116.1		2.4	2.8
Frozen vegetables (1982-84=100)	177.0	171.4	176.3		3.3	0.4
Dry beans, peas, lentils	115.2	113.8	108.6		1.2	6.1
Olives, pickles, relishes	110.0	109.7	107.7		0.3	2.1
<b>Producer Price Indexes (1982=100)</b>						
Canned vegetables and juices	135.6	135.8	131.5		-0.1	3.1
Pickles and products	183.1	181.3	179.9		1.0	1.8
Tomato catsup and sauces 1/	128.7	128.8	125.6		-0.1	2.5
Canned dry beans	123.8	123.7	123.4		0.1	0.3
Vegetable juices 1/	110.4	110.4	110.8		0.0	-0.4
Frozen vegetables	137.4	136.7	135.1		0.5	1.7
Dried/dehy. fruit & vegetables	145.4	144.5	145.4		0.6	0.0

-- = Not available. 1/ Index base year is 1987. Source: Bureau of Labor Statistics, U.S. Dept. of Labor.



products. In addition, export competition is stronger due to larger stocks in several other tomato-producing nations. Fortunately, it appears that tomato product demand has been strong, with average monthly disappearance running above that of a year earlier. On a fresh-equivalent basis, estimated disappearance has been running at more than 1 million tons per month. In 2004, per capita use of processing tomatoes was estimated to have increased for the third consecutive year. Given continued improvement in the domestic economy, use of processed tomato products is expected to remain relatively strong in 2005.

On a calendar-year basis, 2004 export volume for processed tomato products was again record-large. Low prices and more favorable exchange rates led to the 2-percent increase in volume (expressed on a fresh-weight basis) over 2003 (the previous record-high). Although ketchup exports were 20 percent lower and were the smallest since 1993, volume increased for paste (up 4 percent) and sauces (up 6 percent). Larger volume was shipped to Mexico, Canada, and South Korea. Exports to Mexico were valued at \$39 million—exceeding the 2003 record-high (\$31 million). Exports to Japan (now the third largest foreign market) fell 5 percent to \$20 million, remaining well below the 1995 peak of \$36 million.

With the smaller crop in 2003 leading to improved prices for tomato products during the first half of 2004, import volume (on a fresh-equivalent basis) increased 11 percent to 1.3 billion pounds. The value of imports increased 19 percent to \$129 million led by Canada (up 29 percent), Italy (16 percent), and Mexico (16 percent). Driven largely by sales of catsup, Canada now accounts for 46 percent of U.S. tomato product import value. Catsup accounted for 71 percent of the value of tomato product imports from Canada, with volume rising 34 percent in 2004.

### ***Pack of Other Canning Vegetables Could Rise in 2005***

In the coming year, canners (other than tomato processors) will likely contract for more volume (up 1 to 3 percent) following the smaller pack of 2004. With wholesale prices for canned vegetables up modestly from a year ago (the producer price index for canned vegetables excluding juices in January was 4 percent above a year earlier), a larger pack is anticipated for green peas, sweet corn, and pickling cucumbers, with less volume possible for snap beans. Including tomatoes, canners are expected to contract for fewer acres of the five major processed vegetable crops this year. USDA will release the first estimate of contract plantings on April 1.

Table 7--Production of selected processing vegetables, 2001-04

Year	2001	2002	2003	2004	Change 2003-04 2/ Percent
	1,000 short tons				
<b>Canning:</b>					
Tomatoes	9,248.7	11,670.8	9,819.7	12,266.4	25
Sweet corn	1,517.6	1,428.0	1,556.3	1,458.3	-6
Snap beans	434.1	534.7	503.5	561.3	11
Green peas	155.8	137.7	209.1	138.6	-34
Cucumbers	581.5	619.3	648.4	586.0	-10
Subtotal	11,937.8	14,390.5	12,737.0	15,010.5	18
<b>Freezing:</b>					
Sweet corn	1,630.0	1,639.7	1,709.7	1,509.9	-12
Snap beans	254.0	259.0	224.2	262.3	17
Green peas	235.2	212.2	258.6	251.5	-3
Subtotal	2,119.2	2,110.9	2,192.5	2,023.7	-8
<b>Selected total</b>	<b>14,056.9</b>	<b>16,501.4</b>	<b>14,929.5</b>	<b>17,034.2</b>	<b>14</b>

Source: National Agricultural Statistics Service, USDA.

## Pickling Cucumber Disappearance Stabilizes

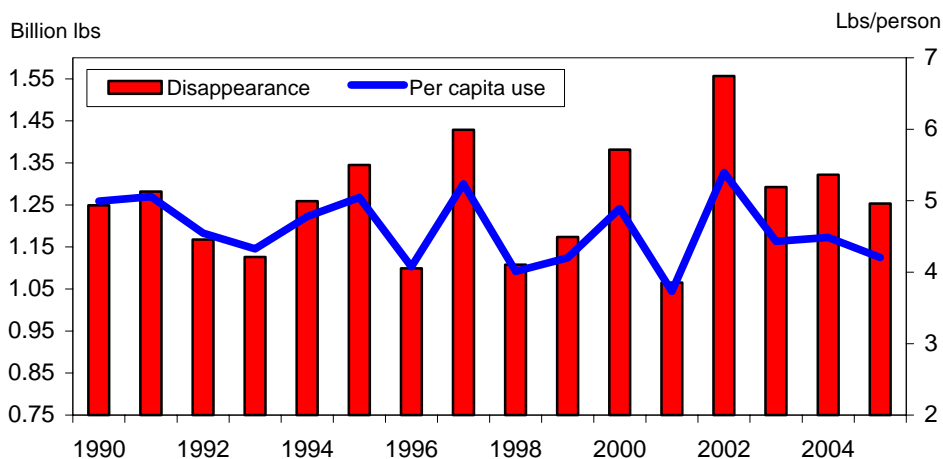
Production of cucumbers for pickles is expected to rise in 2005 due to lower stocks and an apparent stabilization of consumption the past few years. Over the past 5 years, total disappearance of cucumbers for pickles has averaged 1.3 billion pounds annually--nearly 9 percent more than the average of the 1990s. After declining the past several decades, disappearance data suggest that per capita use of cucumbers for pickling has stabilized at 4.6 pounds in the 1990s and 2000s.

Average domestic production during the 2000s increased marginally over the average of the previous decade. The average price per ton (delivered at the processing plant door) has increased in the 2000s—averaging 7 percent higher after accounting for inflation than the average price paid by processors during the 1990s.

While domestic output has been relatively flat, the share of pickle consumption accounted for by imports has doubled—averaging 6 percent in the 2000s. In the past year, imports came in from places such as India (one-third of volume), Canada (one-fourth of volume), and Mexico (one-fifth of volume). India is known for the production of consistent (but labor-intensive) packs of pickled gherkins. While U.S. imports have been rising, the share of domestic supply exported—which has never been a substantial component of the pickling cucumber market—has declined to less than 1 percent on average during the 2000s.

Figure 4

### U.S. pickling cucumbers: Domestic disappearance and per capita use



Source: Economic Research Service, USDA.

Table 8--Value of processed vegetable trade 1/

Item	January - December				Change 2003-04 Percent
	2001	2002	2003	2004	
--Million dollars--					
<b>Imports:</b>					
Canned	532	606	643	733	14
Frozen	305	347	398	455	14
Dehydrated 2/	183	236	235	261	11
<b>Exports:</b>					
Canned	523	512	521	530	2
Frozen	162	160	154	147	-5
Dehydrated 2/	128	126	124	117	-5

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

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

## Potatoes

### *Fall Crop's Higher Yield Outweighs Smaller Harvested Area*

U.S. potato production in 2004 dropped less than 1 percent from 2003. This was the third consecutive year that total U.S. potato production was little changed. U.S. fall potato production of 410 million cwt in 2004 closely matched the 2003 crop despite a 6-percent reduction in area harvested. Reduced area was largely offset by a 6-percent jump in average yield from 367 to 391 cwt per acre, with higher yields experienced for the spring, summer, and fall crops. However, these productivity gains were not enough to prevent output from declining during the spring and fall given fewer acres harvested. Since prices are not significantly different from 2003, demand remains weak.

The 3-percent production gain in Western States, largely from Idaho's crop, almost offset the 8-percent production drop in the Central States. Higher yields in most Western and Central States nearly outweighed reduced harvested areas in most producer States. The 9 million cwt production gain in Idaho prevented a more significant decline in the rest of the country. In the East, Maine's 13-percent larger crop offset lower output in New York and other Eastern States.

Idaho's 7-percent jump in fall potato production means that excess supplies have to be reduced to prevent prices from dropping further. Fall potato stocks in December and January are up from a year earlier. Efforts by growers to remove at least 4 million cwt from the market are intended to keep prices from slipping below \$5 per

Table 9--Fall potatoes: Farm production in major States, 2003-2004

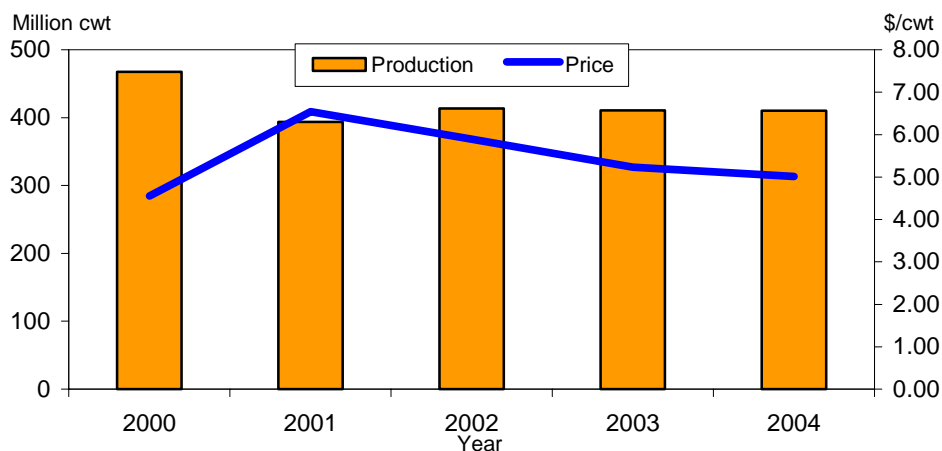
Regions / States	Area harvested			Yield			Production		
	2003	2004	%chg	2003	2004	%chg	2003	2004	%chg
	-- 1,000 acres --			-- Cwt per acre --			--- 1,000 cwt ---		
<b>West:</b>									
California	8.3	7.6	-8.4	425	510	20.0	3,528	3,876	9.9
Colorado	65.7	64.3	-2.1	360	360	0.0	23,652	23,148	-2.1
Idaho	358.0	353.0	-1.4	344	374	8.7	123,180	131,970	7.1
Oregon	42.6	37.0	-13.1	493	534	8.3	20,991	19,775	-5.8
Washington	162.0	159.0	-1.9	575	590	2.6	93,150	93,810	0.7
Other States 1/	23.6	21.3	-9.7	364	383	5.1	8,594.0	8,152.0	-5.1
Total:	660.2	642.2	-2.7	414	437	5.7	273,095	280,731	2.8
<b>Central:</b>									
Michigan	45.5	42.0	-7.7	330	325	-1.5	15,015	13,650	-9.1
Minnesota	58.0	44.0	-24.1	385	430	11.7	22,330	18,920	-15.3
Nebraska	23.2	21.6	-6.9	420	430	2.4	9,744	9,288	-4.7
North Dakota	112.0	101.0	-9.8	245	265	8.2	27,440	26,765	-2.5
Wisconsin	80.0	70.0	-12.5	410	435	6.1	32,800	30,450	-7.2
Other States 2/	9.0	6.8	-24.4	262	324	23.3	2,362	2,200	-6.9
Total:	327.7	285.4	-12.9	335	355	6.0	109,691	101,273	-7.7
<b>East:</b>									
Maine	65.5	62.0	-5.3	260	310	19.2	17,030	19,220	12.9
New York	21.7	19.2	-11.5	300	270	-10.0	6,510	5,184	-20.4
Other States 3/	15.8	14.0	-11.4	270	258	-4.3	4,262	3,615	-15.2
Total:	103.0	95.2	-7.6	270	294	9.0	27,802	28,019	0.8
Fall total:	1,090.9	1,022.8	-6.2	376	401	6.6	410,588	410,023	-0.1

1/ Montana, Nevada, New Mexico, and Utah.

2/ Indiana, Ohio, and South Dakota. 3/ Massachusetts, Pennsylvania, and Rhode Island.

Sources: Potatoes 2003 Summary; Crop Production, NASS.

Figure 5

**U.S. fall potato production and season average price are flat**

Source: National Agricultural Statistics Service, USDA except 2004 price from ERS forecasts.

Table 10--Fall potato stocks and use to February 1

Crop year	Fall production 1/	Minus use to Jan. 1	Equals stocks, Jan. 1	Jan. 1 stocks / Production	Minus January use	Equals stocks, Feb. 1	Feb. 1 stocks / production
	-- Million cwt --		Percent		-- Million cwt --		Percent
2000-01	458.8	183.6	275.3	60.0	41.0	234.3	51.1
2001-02	387.0	162.4	224.7	58.1	32.6	192.1	49.6
2002-03	407.1	175.6	231.5	56.9	32.5	199.0	48.9
2003-04	403.2	169.6	233.6	57.9	33.4	200.2	49.7
2004-05	403.3	165.1	238.2	59.1	34.0	204.2	50.6
	-- Percent --						
Change 2/	0.0	-2.6	2.0	1.9	2.0	2.0	1.9

1/ Data are for the 15 major producer States. 2/ Change from 2003-04 to 2004-05.

Source: *Potato Stocks*, NASS, USDA.

cwt--the estimated production cost for Idaho potatoes. Prices received by Idaho growers are typically among the lowest in the United States. Cooperatives formed by potato growers in Idaho and other States are diverting excess supplies to compost, cattle feed, food pantries, other humanitarian aid, or ethanol production for the purpose of limiting domestic shipments. Farmers in Idaho who participate in these voluntary programs are reimbursed \$2.50 per cwt of removed production. The average return to growers in other States is \$2.13 per cwt. About half of U.S. fresh potato production is estimated to fall under these self-imposed efforts to keep prices stable and not sink below the cost of production.

***Domestic Shipments and Shipping-Point Prices Are Down***

Domestic shipments of potatoes, including chipper and seed potatoes, were about 2 percent lower during January to December 2004 than in calendar year 2003, reflecting partial success by growers in cutting market supply. Shipments in January 2005 were only 92 percent of shipments made a year earlier. Also, shipments in the fourth quarter of 2004 are 6 percent below corresponding shipments in 2003. These

Table 11--Potato stocks as percent of fall production, 15 major States

Crop year	Dec. 1	Jan. 1	Feb. 1	Mar. 1	Apr. 1	May 1	June 1
-- Percent --							
1995	65.0	56.6	48.0	39.5	29.3	19.2	---
1996	66.5	58.9	51.0	42.6	33.3	23.3	---
1997	67.4	59.6	51.4	42.5	32.5	22.5	---
1998	66.4	58.2	49.5	41.0	31.0	20.8	11.9
1999	65.4	57.0	49.3	40.3	30.5	20.7	11.2
2000	67.6	60.0	51.1	43.1	33.5	23.8	13.4
2001	66.9	58.1	49.6	41.0	31.0	21.0	11.1
2002	65.0	56.9	48.9	40.6	30.9	20.4	11.3
2003	66.4	57.9	49.7	41.2	31.3	21.1	11.4
2004	67.4	59.1	50.6				
<i>10-yr. avg.</i>	<i>66.4</i>	<i>58.2</i>	<i>49.9</i>	<i>41.3</i>	<i>31.5</i>	<i>21.4</i>	<i>11.7</i>

--- = not available.

Source: [www.NASS.USDA.gov](http://www.NASS.USDA.gov).

further indicate current subdued demand for domestic potatoes, which is also evident in dampened prices for fresh and processing potatoes.

With the exception of August, 2004 monthly prices received by U.S. growers for fresh potatoes were all lower than in 2003. Prices for processing potatoes, however, were about the same as in 2003. One reason for the relatively stronger demand for processing potatoes was greater export volume in 2004 compared with fresh potato exports. Nevertheless, retail prices for frozen french fried potatoes and for potato chips were generally lower in 2004 than in 2003.

### ***January Stocks Are Highest in 4 Years***

Fall potato stocks in 15 major States totaled 204 million cwt on February 1, 2005, up 2 percent from 2004. The share of these stocks with respect to fall production of 403 million cwt is 51 percent, also higher than the 3 preceding years. The reason for this buildup is reduced use of the fall crop through December 2004, as well as intentional diversion from oversupply. The Idaho Russet composed the bulk of these added stocks, which grew by more than 10 percent from 2004's level.

Over the past decade, potato stocks as a percentage of fall production have averaged:

- 66 percent on December 1;
- 58 percent on January 1;
- 50 percent on February 1;
- 41 percent on March 1;
- 32 percent on April 1;
- 21 percent on May 1; and
- 12 percent on June 1.

This means that half of the 2004 fall crop is expected to be sold by February 1. Between 35 and 36 million cwt, or about 8.5 percent of the fall crop, would be sold in February 2005. Compared with 2003, a larger percentage of 2004s fall crop is in inventory, and only 40 percent has been consumed through January 2005 versus 50

percent of the 2003 fall crop. This could explain the relatively weaker demand thus far for the new season (winter) potato crop.

### ***Exports Grew Faster Than Imports***

U.S. potato exports in 2004 were \$742 million, up 14 percent from 2003. Frozen french fries earn about half of that export value, headed largely to Japan, Canada, and Mexico. The total U.S. export value for potatoes represents 29 percent of the value of U.S. potato production sold, up from 27 percent in 2003. Despite this bright export picture, U.S. imports of frozen french fries, largely from Canada, were up 18 percent. These imports represent 65 percent of total U.S. potato import value. Thus, the U.S. trade deficit in frozen fries increased to \$155 million in 2004 from \$125 million in 2003. The positive net export performance of potato chips, flakes and granules, canned or preserved potatoes, and fresh or chilled potatoes prevented the U.S. trade deficit in potatoes from deteriorating even further.

In volume, U.S. potato exports and imports were up 4 and 3 percent, respectively, in 2004. U.S. export volume to the top four markets—Japan, Canada, Mexico, and China—comprise 73 percent of total U.S. potato export volume in 2004. Besides frozen french fries, the United States had a trade deficit in seed potatoes, other frozen potatoes, and potato starch. Most imports of seed and other frozen potatoes are from Canada. Potato starch is purchased largely from the European Union. Despite the depreciation of the dollar with respect to the Canadian dollar and the euro in the past 3 years, U.S. imports of frozen potatoes, potato chips, and potato starch continued to increase. Imports of potato chips, worth \$96 million in 2004, mostly come from Mexico and Canada.

Both export and import unit values—indicators of U.S. terms of trade in potatoes—grew 10 percent in 2004. For all potatoes and potato products, the average export unit value was 38 cents per pound in 2004, while the unit value for imports averaged 27 cents per pound. Exports of frozen french fries and potato chips to Japan, Taiwan, and the Philippines accounted for the higher export unit values in 2004. On the import side, U.S. purchases of potato chips, potato flakes, and potato granules accounted for much of the higher import unit values in 2004.

## Sweet Potatoes

### *Strong Production Pulls Prices Down*

U.S. production of sweet potatoes during the 2004 crop year totaled 16.4 million cwt—3 percent greater than a year earlier and the largest crop since 1962. Most of the increase in the 2004 crop was the result of a 1-million-cwt jump in North Carolina (the top producing State), which harvested 1,000 more acres than a year earlier. Production in Louisiana, Alabama, and South Carolina declined by more than 0.9 million cwt due to crop damage from summer hurricanes in 2004 that reduced crop yields and quality. The rains in the Carolinas, however, actually helped the sweet potato crop by raising yields. Overall, the average yield of the U.S. crop rose 2 percent to 176 cwt in 2004, while area harvested was up less than 1 percent.

Helped by strong average yields, sweet potato growers in North Carolina and California posted record production in 2004. Mississippi produced their largest crop since 1945 (the State record occurred in 1934 at 5.2 million cwt). California's 295 cwt per acre was by far the highest yield in the country, about double the average yield in other States. Nevertheless, facing relatively flat consumer demand, prices in all nine surveyed States declined despite the 26-percent drop in Louisiana's crop. The estimated 2004 season-average price of \$17.50 per cwt is down 9 percent from 2003. Even prices for Louisiana's smaller crop fell 11 percent, the steepest decline among all States with the exception of Alabama.

The greater domestic supply of sweet potatoes, however, was not enough to overcome their lower prices. Thus, production value slipped 6 percent from 2003's record high \$305 million to \$287 million in 2004. Accordingly, average production value per acre harvested decreased 7 percent from \$3,302 to \$3,080. Compared with historical per-acre values ranging from \$2,084 in 1993 to \$2,621 in 2002, however, 2004's level remains significantly higher. At \$23.30 average price per cwt, California's value per acre was \$6,874, the runaway leader among States.

After adding imports to domestic production, total U.S. supply of sweet potatoes was 1,651 million pounds, up 3 percent from 2003. After subtracting estimated seed use, feed, shrink, and loss, total domestic use amounted to 1,402 million pounds in 2004, 3 percent above 2003's level. Given U.S. population of 294 million in 2004, per capita consumption of sweet potatoes is 4.8 pounds, up from 4.7 pounds in 2003. This per capita use level, which is not adjusted for annual stock change, is the highest since 1985 when it reached 5.4 pounds. Increased domestic consumption of sweet potatoes is attributed not only to population growth, but also to demand from the larger number of Latin and Asian Americans.

Table 12--Sweet potatoes: Production and prices, 2003-2004

States	Production			Prices		
	2003	2004	Change	2003	2004p	Change
	-- 1,000 cwt --		Percent	-- \$ per cwt --		Percent
California	3,210	3,393	5.7	25.20	23.30	-7.5
Louisiana	3,150	2,325	-26.2	20.00	17.80	-11.0
Mississippi	2,380	2,601	9.3	20.80	19.80	-4.8
North Carolina	5,880	6,880	17.0	14.50	13.50	-6.9
Other States	1,271	1,200	-5.6	--	--	--
United States	15,891	16,399	3.2	19.20	17.50	-8.9

p = preliminary.

Source: NASS, USDA.

Table 13--Sweet potatoes: Shipping-point prices in selected States 1/

Year	3rd Qtr	4th Qtr	1st Qtr	2nd Qtr	Year 2/
<i>Index, 2000-01 = 100</i>					
1999-00	---	---	128.3	102.4	126.2
2000-01	---	99.8	98.9	70.2	100.0
2001-02	---	96.1	94.1	92.5	95.5
2002-03	91.8	95.3	116.8	136.9	107.7
2003-04	153.1	138.8	138.2	128.5	138.7
2004-05	125.5	118.9			120.6
% change	-18.1	-14.4			-13.1

--- = Not available.

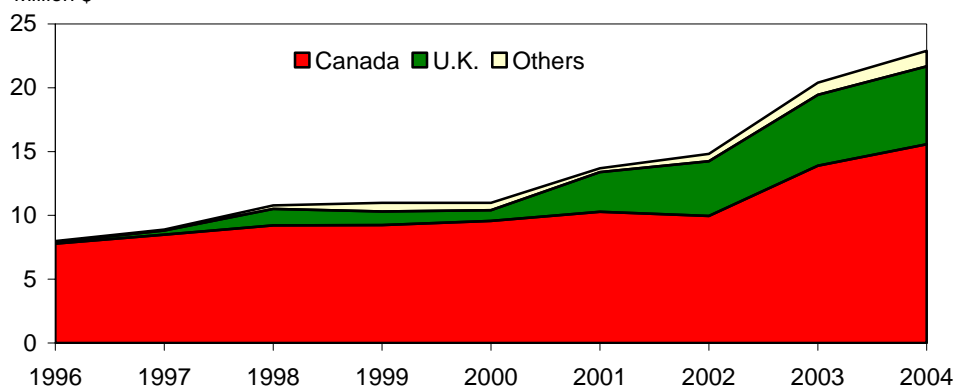
1/ Weighted fresh-market prices in Eastern North Carolina and Louisiana, using domestic shipments as weights. 2/ Marketing year is from July to May.

Source: [www.ams.usda.gov](http://www.ams.usda.gov).

Figure 6

### U.S. sweet potato exports are rising

Million \$



Sources: NASS, USDA except 2004 forecast by ERS, USDA.

### Lower Prices and a Depreciated Dollar Raise Export Prospects

Based on sweet potato shipments through January from North Carolina, Louisiana, and Central California, demand for 2004's crop is down 22 percent from 2003. As expected, shipping-point prices thus far for the 2004 crop are also significantly lower in North Carolina and Louisiana, resulting in an average 13-percent price discount from the preceding season. Unless consumer demand picks up before May, the only remaining outlet for producers is the export market. Lower prices and a depreciated dollar can only help prospects for sweet potato shipments overseas or across to Canada and Mexico. However, like the U.S. market, demand for sweet potatoes in Canada and the U.K. peaks during the holiday seasons.

U.S. exports of sweet potatoes in calendar year 2004 totaled 63.9 million pounds, up 9 percent from 2003. This corresponds to \$22.6 million worth of exports, resulting in a record \$19 million U.S. trade surplus after netting out \$3.5 million of sweet potato imports. Export earnings have been climbing steadily over the past decade as import demand from Canada and the United Kingdom, by far the two biggest export markets, has soared. Export earnings as a percentage of the value of production of \$287.4 million was 7.8 percent in 2004, up from 5 percent in 1999. The average export price of 35 cents per pound is the same as in 2003, but up from 29 cents in 2002. In comparison, the import unit value is 31 cents per pound, up sharply from 21 cents in 2003.



## Dry Edible Beans

### *Acreage To Rise in 2005*

Area planted to dry edible beans is expected to rise 20-30 percent this spring from last year's low 1.35 million acres. The main impetus for the expected gain in area is a combination of shrinking dry bean stocks, higher U.S. dry bean prices, and much lower prices for alternative crops such as soybeans (down 30 percent) and field corn (down 20 percent). As usual, the supply response to price changes will vary considerably among bean classes. A moderate to strong increase in acreage is expected for pintos, navy, kidney beans, baby limas, and cranberry beans. However, area is only expected to increase marginally (if at all) for Great Northern, garbanzo, black, small red, pink, large lima, and blackeye beans.

The potential for increased area is greatest for pinto and navy beans with each expected to rise by about one-fourth. These two classes alone could account for three-fourths of the additional area expected to be planted in 2005. Aside from processor contract offerings, a key to these two crops depends largely on how growers in places such as North Dakota, Minnesota, and Michigan react to the price incentives for dry beans versus the lower prices offered by alternative markets such as corn and soybeans. Pinto grower prices are record-high, which should provide sufficient incentive, assuming enough reasonably-priced seed (of the favored varieties) is available. The first survey-based examination of 2005 row crop area (including dry beans) will be available on March 31 when USDA/NASS releases the *Prospective Plantings* report.

Assuming average weather this summer and fall, a further boost to production is also likely from a return to average yields and a slight reduction in acreage abandonment. Due in part to the August freeze in the upper Midwest, national dry bean yield averaged just 14.6 cwt per acre last year—231 pounds below the 30-year trend (1975-2004) and the lowest since 1993. For 2005, the 30-year trend yield for all dry beans is estimated to be 17.0 cwt (for comparison, the 5-year moving

Table 14--U.S. pinto beans: Acreage, yield, production, and value, 1990-2005

Year	Acreage 1/		Yield 1/ Cwt/acre	Produc- tion 1/ 1,000 cwt	Farm value	
	Planted 1,000 acres	Harvested			Per unit 2/ \$/cwt	Crop 3/ Mil. dols.
1990	964.2	925.1	14.76	13,650	14.89	203,249
1991	839.8	814.1	16.76	13,643	11.78	160,715
1992	682.8	636.9	14.40	9,172	16.51	151,430
1993	821.9	687.5	11.65	8,006	25.76	206,235
1994	929.2	827.9	15.34	12,703	15.16	192,577
1995	841.0	758.2	14.84	11,253	18.56	208,856
1996	821.7	778.2	15.58	12,123	18.85	228,519
1997	773.8	707.7	15.43	10,920	18.84	205,733
1998	977.1	923.0	15.72	14,511	12.77	185,305
1999	706.2	645.9	16.81	10,857	11.64	126,375
2000	724.5	652.2	16.53	10,778	12.01	129,444
2001	558.6	509.4	17.18	8,750	25.18	220,325
2002	832.3	742.3	17.77	13,188	13.79	181,863
2003	663.9	639.2	16.35	10,453	15.79	165,053
2004	650.9	573.7	13.62	7,814	30.00	234,420
2005 3/	810.0	736.0	16.29	11,990	16.50	197,830

1/ Source: NASS, USDA. 2/ Source: Bean Market News, AMS, USDA. 3/ Source: ERS, USDA.

average is 16.2 cwt). Taken together, these factors point to a potential U.S. dry bean crop of 24 to 27 million cwt in the coming season.

### ***Grower Prices Up***

With stocks dwindling, dealer prices and grower bids have continued to strengthen for many of the major bean classes as the marketing season progresses. The U.S. aggregate grower price for all dry beans averaged 43 percent above a year earlier during the initial 5 months of the marketing year (September 2004 through January 2005). With the exception of blackeye beans (down 4 percent), the dealer price for every major dry bean class averaged above that of a year earlier during Sep.-Jan. During this time, wholesale (dealer) prices for several of the major classes changed as follows:

- Pintos, \$36.40—up 75 percent from a year earlier;
- Navy, \$31.55—up 41 percent;
- Great Northern, \$25.30—up 13 percent;
- Black, \$26.99—up 17 percent;
- Light red kidney, \$36.87—up 27 percent;
- Dark red kidney, \$35.88—up 32 percent;
- Baby lima, \$41.45—up 32 percent.

In the year ahead, average weather should result in improved output, which could raise stocks and put pressure on both grower and dealer prices for the major bean classes. In turn, increased availability and lower prices could help stimulate lagging export demand.

### ***Exports Down 24 Percent***

During the first 4 months of the 2004/05 marketing year (September-December), dry bean export volume declined 24 percent from a year earlier and 29 percent from 2 years earlier. Exports were down for virtually every bean class except large lima (up 109 percent), navy (up 35 percent), and blackeyes (up 11 percent). Among the top bean classes, volume was lower for black (down 57 percent), pinto (down 32 percent), and Great Northern (down 30 percent).

Table 15--U.S. dry beans: Monthly grower prices for selected classes, 2004-2005

Commodity	2004		2005		Chg. prev. year:	
	Jan.	Feb.	Jan.	Feb. 1/	Jan.	Feb.
--- Cents per pound ---				--- Percent ---		
All dry beans	17.20	17.50	27.00	--	57.0	--
Pinto (ND/MN)	14.63	15.13	32.00	31.50	118.7	108.2
Navy (pea bean) (MI)	17.50	17.50	26.00	26.00	48.6	48.6
Great Northern (NE/WY)	15.00	15.00	17.50	17.50	16.7	16.7
Black (MI)	18.25	18.13	18.88	20.75	3.5	14.5
Light red kidney (MI)	22.75	22.50	27.50	27.50	20.9	22.2
Dark red kidney (MN/WI)	21.75	22.50	28.75	28.00	32.2	24.4
Small red (ID)	21.00	21.00	22.50	22.50	7.1	7.1
Baby lima (CA)	30.00	30.00	39.63	39.50	32.1	31.7
Large lima (CA)	41.00	41.00	42.38	42.00	3.4	2.4
Blackeye (CA)	28.00	28.00	29.17	28.50	4.2	1.8
Pink (ID)	20.00	20.00	22.50	22.50	12.5	12.5

-- = not available. 1/ Partial month estimate.

Source: *Bean Market News*, AMS, USDA except "all dry bean" price from NASS, USDA.

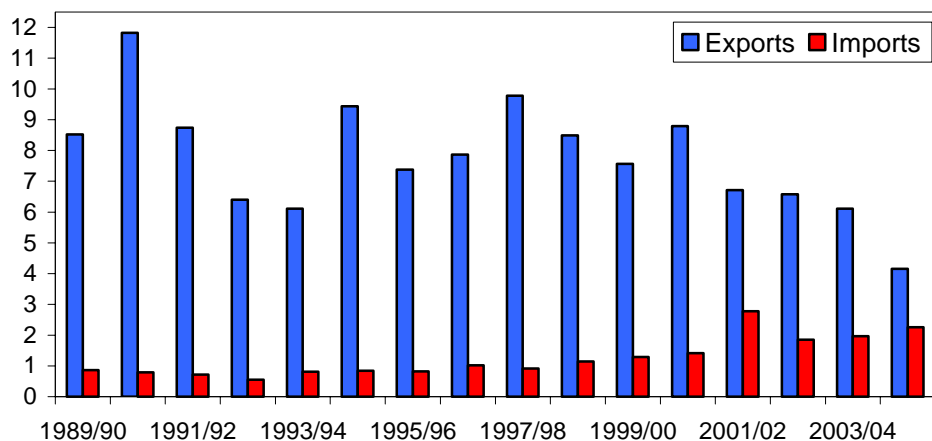
The leading export markets were Mexico (21 percent of total volume), the United Kingdom (11 percent), and Canada (9 percent). While exports to Mexico (down 37 percent) and Canada (14 percent) each declined because of sharply higher prices, shipments to the United Kingdom advanced 41 percent due to stronger interest in U.S. navy beans and lower average export prices (down 2 percent) compared with a year earlier. Exports to France (up 66 percent) and Japan (8 percent) also increased during the first 4 months of the crop year. Although average U.S. dry bean export prices were up 21 percent from the previous year, unit prices for the mix of dry beans imported by France and Japan averaged below those of a year earlier.

On the import side, due largely to sharply higher prices for U.S. dry beans, import volume from September to December rose 14 percent from a year earlier. Imports were lower for pinto, dark red kidney, and Great Northern beans but were higher for most other classes including large and small chickpeas, navy, light red kidney, and black beans. Pinto bean imports were down 49 percent despite low stocks and record-high prices. Imports from Canada (down 24 percent) were lower but volume from Mexico (up 104 percent) was higher.

Figure 7

**U.S. dry bean trade volume, 1989/90 - 2004/05**

Mil cwt



Source: Bureau of the Census, USDC except 2004/05 forecast by ERS.

Table 16--U.S. dry bean export volume

Item	Crop year 2003/04	September - December			Change 2003-04 Percent
		2002/03	2003/04	2004/05	
		1,000 cwt			
Pinto	2,002	661	633	430	-32
Navy	1,212	435	341	460	35
Black	816	311	474	202	-57
Great Northern	427	170	256	180	-30
Lgt red kidney	57	211	25	19	-22
Dk red kidney	192	118	94	81	-14
Small red	232	47	79	31	-61
Garbanzo	149	15	37	30	-18
Baby lima	195	79	76	63	-17
Large lima	99	75	28	59	109
Blackeyes	20	31	12	13	11
Cranberry	97	57	56	17	-71
Other	610	315	258	215	-17
<b>Total</b>	<b>6,106</b>	<b>2,525</b>	<b>2,368</b>	<b>1,799</b>	<b>-24</b>

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

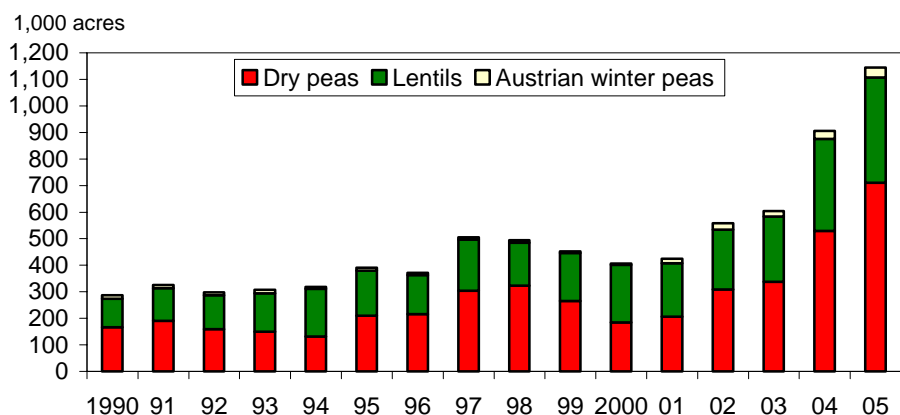
## Dry Peas & Lentils

### *Dry Pea and Lentil Area Expected To Rise Again*

Driven by the income security provided by the marketing loan program, favorable market prices for lentils, falling prices for alternative crops, relatively low input costs, and the long-term benefits of having pulses in a crop rotation, U.S. dry pea and lentil growers are again expected to seed more acreage this spring than a year ago. Area devoted to dry peas and lentils is on a strong upward trend in the United States, especially in North Dakota and Montana where much of this year's expansion is expected to occur. In 2005, it is likely that much of the increase in pulse crops will be focused on dry peas. Lentil area is projected to show a smaller increase than last year's 40-percent surge and area planted to dry peas (which jumped 57 percent in 2004) could rise more than a third this year as interest in these crops continues to expand beyond traditional growing areas.

Figure 8

#### U.S. dry peas and lentils: Area planted, 1990-2005 \*



\* Excludes chickpeas. Sources: NASS, USDA except 2005 forecast by ERS, USDA.

Table 17--U.S. dry peas & lentils: Monthly prices by class, 2004-2005

Commodity	2004		2005		Chg. prev. year:	
	Jan.	Feb.	Jan.	Feb. 1/	Jan.	Feb.
--- Cents per pound ---				--- Percent ---		
<i>Dealer prices:</i>						
Green peas, whole	14.31	14.88	9.00	10.50	-37.1	-29.4
Yellow peas, whole	12.56	13.19	8.46	9.63	-32.6	-27.0
Green peas, split	16.56	17.38	13.25	13.32	-20.0	-23.4
Yellow peas, split	15.50	15.80	9.25	12.38	-40.3	-21.6
Lentils, brewer	23.38	24.38	17.13	18.88	-26.7	-22.6
Lentils, pardina	26.31	26.81	17.06	18.63	-35.2	-30.5
Austrian winter peas	--	--	12.25	14.75	--	--
<i>Grower prices:</i>						
Green peas, whole	9.56	9.94	7.08	7.00	-25.9	-29.6
Yellow peas, whole	7.91	8.72	7.00	6.00	-11.5	-31.2
Lentils, brewer	17.00	19.00	14.50	14.25	-14.7	-25.0
Lentils, pardina	20.25	20.63	14.33	14.13	-29.2	-31.5
Austrian winter peas	13.83	--	9.83	9.75	-28.9	--

-- = not available. 1/ Prices for February 2005 are partial month averages.

Source: Adapted from weekly data provided by the *Bean Market News*, AMS, USDA.

The first USDA release indicating 2005 acreage for dry peas and lentils will be released in the July 12 *Crop Production* report.

### ***Crop Value Up Again in 2004/05***

Based on preliminary estimates of season average prices, the value of all U.S. dry pea and lentil production totaled \$148 million in 2004/05—up 61 percent from a year earlier and the highest on record. All dry pea (dry peas, Austrian winter peas, and wrinkled seed peas) crop value increased 66 percent to \$84 million as sharply higher production outweighed lower prices. The value of lentil output jumped 55 percent to a record \$64 million as production rose, outweighing a 10-percent drop in the estimated season average price. Although lentil prices declined to \$15.40/cwt, they remained well above the average of the previous 5 years (\$12.55/cwt).

### ***July-December Export Volume Up 42 Percent***

U.S. export volume (including food aid) of all dry peas and lentils (excluding seed) jumped 42 percent during the first 6 months (July-December) of the 2004/05 crop year to 2.84 million cwt. Although lentil exports declined 7 percent and Austrian winter peas declined, all other dry pea exports increased during the first half of the crop year. Chickpea export volume jumped 82 percent as a larger U.S. crop, lower supplies in Canada, and the weaker dollar aided exporters. With large supplies and lower prices, split pea (up 133 percent) and whole green pea (up 43 percent) exports also increased. Exports of dry yellow peas, which are coming off a record-high last year, increased 30 percent and are expected to continue strong given industry sales to Cuba and USDA food aid tenders. With large domestic supplies, lower prices, strong food aid demand, and a more favorable exchange rate, overseas movement of U.S. dry peas and lentils is expected to remain strong in the coming months.

Table 18--U.S. dry peas & lentils: Trade volume by class, July-December 1/

Item	Crop year, July-December				Change
	2001/02	2002/03	2003/04	2004/05	2003-04
	--1,000 cwt--				Percent
<i>Exports:</i>					
Green peas	660.7	703.5	714.1	1,017.9	43
Yellow peas	91.8	90.0	256.6	333.4	30
Split peas	59.8	58.8	47.9	111.3	133
Austrian winter	20.3	13.9	8.6	5.7	-34
Misc. dry peas	354.0	144.4	114.2	517.2	353
Chickpeas, all	346.0	202.2	66.3	120.5	82
Lentils, all	1,080.9	917.0	793.2	738.8	-7
Total	2,613.5	2,129.9	2,001.0	2,844.8	42
<i>Imports:</i>					
Green peas	37.1	19.4	109.4	62.1	-43
Yellow peas	23.5	19.3	34.5	23.9	-31
Split peas	125.1	117.5	128.6	159.4	24
Austrian winter	2.4	1.3	0.5	0.9	81
Misc. dry peas	44.1	43.9	30.7	38.4	25
Chickpeas, all	99.9	114.8	100.2	140.1	40
Lentils, all	68.0	75.1	89.9	93.7	4
Total	400.1	391.2	493.8	518.6	5

1/ Excludes planting seed.

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

## Mushrooms

### *U.S. Imports and Exports Each Rise*

During the first half (July-December) of the 2004/05 marketing year, the volume of U.S. mushroom imports increased 5 percent, while export volume dropped 8 percent. Through December, export value (including spawn) totaled \$23 million (down 7 percent), while import value dropped 2 percent to \$100 million. Imports of canned mushrooms and truffles fell 1 percent to 67 million pounds (product-weight) despite a 37-percent increase in volume from China (PRC). China's share of the U.S. canned mushroom import market rose to 33 percent, compared with 24 percent a year earlier.

Fresh-market imports accounted for 8 percent of consumption in 2003/04—up from 1 percent in 1995 and 5 percent in 2000. Fresh agaricus imports declined 1 percent to just under 26 million pounds during the first 6 months of the 2004/05 crop year, while fresh specialty imports increased 17 percent to 3 million pounds as volume from China increased 25 percent. Imports of dried and dehydrated mushrooms jumped 34 percent to 3.3 million pounds. China now accounts for three-fourths of dried mushroom volume (62 percent a year ago), with smaller shares from places such as Canada and Taiwan.

### *World Production Likely Up in 2004*

According to early estimates by the Food and Agriculture Organization (FAO) of the United Nations, world production of all mushrooms increased 2 percent to 7.1 billion pounds in 2004. World mushroom production has been trending higher over the past two decades. During the 3-year period 2002-04, world mushroom production averaged 56 percent above that of 1992-94. Recent growth appears to have been particularly strong, with 2004 production 23 percent higher than in 2000.

The United States remains the second largest producer with 12 percent of world output. Production in China, the top producer with 42 percent of output, continues to trend higher as producers look to satisfy both rising domestic demand and an expanding export market. According to FAO statistics, area devoted to mushrooms

Table 19--U.S. mushrooms: Trade value by product class, July-December 1/

Item	Crop year, July-December				Change
	2001/02	2002/03	2003/04	2004/05	2003-04
	--Million dollars--				Percent
<i>Exports:</i>					
Fresh	15.3	11.9	12.4	14.6	18
Canned	2.8	2.1	2.2	1.2	-42
Dehydrated	5.2	3.0	4.7	1.9	-60
Spawn	5.3	4.6	4.9	4.8	-3
Total	28.6	21.6	24.1	22.5	-7
<i>Imports:</i>					
Fresh	24.4	30.2	36.7	35.7	-3
Canned	60.7	49.7	54.1	48.8	-10
Frozen	1.7	1.6	3.1	5.4	75
Dehydrated	5.3	10.1	8.1	9.8	20
Spawn	0.8	0.7	1.0	0.7	-31
Total	92.9	92.2	102.9	100.4	-2

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

in China has increased 41 percent since 2000, with the equivalent of nearly 30,000 acres now under cultivation.

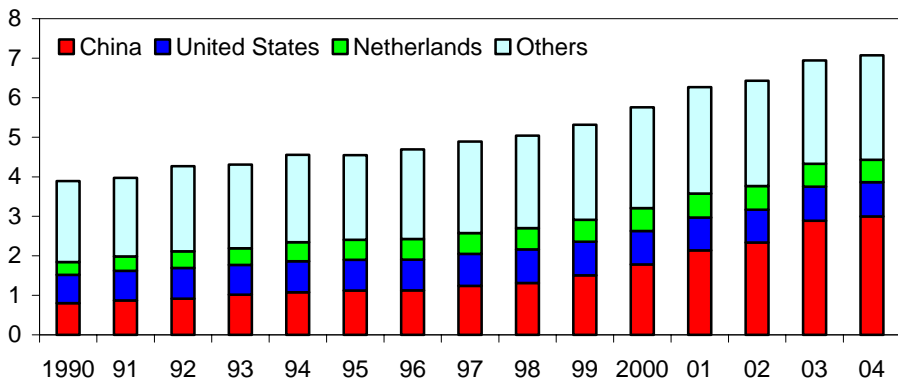
After the United States, the leading mushroom producers include the Netherlands (8 percent of world output), France (5 percent), Poland (4 percent), and Spain (4 percent). Over the past decade (comparing the periods 1992-94 and 2002-04), mushroom production has increased in each of the top 10 countries, with the exception of France (down 7 percent) and the United Kingdom (down 36 percent). Among the top 5 producers, output increased the most in China (up 173 percent), the Netherlands (up 32 percent), and Poland (up 20 percent).

According to FAO data, world canned mushroom trade increased between 2002 and 2003 (figure 10). In volume terms, Germany (23 percent of world imports), the United States (13 percent), and France (6 percent) were the top canned mushroom importers in 2003. Although exports to Germany and France declined, the world volume of canned mushroom imports rose 4 percent in 2003. Between 1991-93 and 2001-03, the volume of canned mushroom imports rose 18 percent. However, average import prices have declined, which has reduced canned import value 15 percent over the past decade. China (51 percent), the Netherlands (22 percent), and Spain (7 percent) were the top canned mushroom exporters in 2003.

Figure 9

**World mushroom production, 1990-2004**

Billion lbs

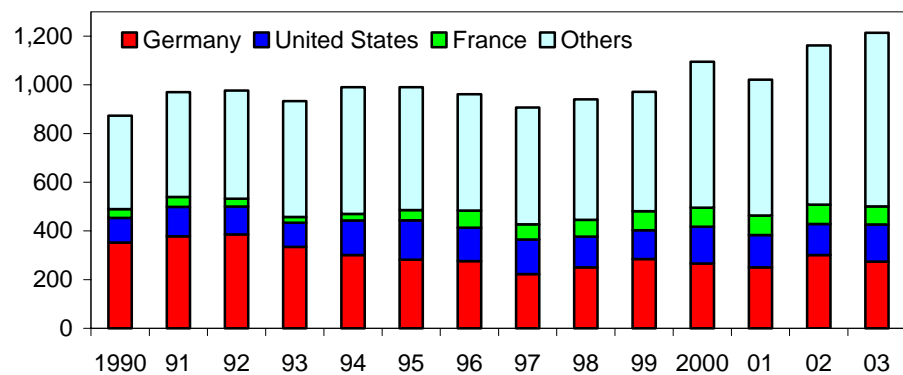


Source: FAOStat (2/05), Food and Agriculture Organization, United Nations.

Figure 9

**World canned mushroom imports, 1990-2003**

Million lbs



Source: FAOStat (2/05), Food and Agriculture Organization, United Nations.

## Commodity Highlight: Romaine Lettuce

Over the past 15 years, romaine lettuce (also known as cos) has been one of this country's fastest growing vegetables in terms of production, consumption, and exports. One of the four main types of the species, *Lactuca sativa* within the sunflower family, romaine has been in the human diet for thousands of years. One of the more nutritious lettuce crops, romaine is a good source of vitamins A and C, folate, and a variety of other nutrients, while remaining low in calories. Originating in the region east of the Mediterranean Sea, romaine is a cool-season crop, which grows well in the desert southwest during the winter and along the central coast of California at other times. Romaine features long, broad, upright leaves that produce heads. The three other types of lettuce are crisphead (which includes the ever popular variety known as iceberg), butterhead lettuce, and looseleaf lettuce.

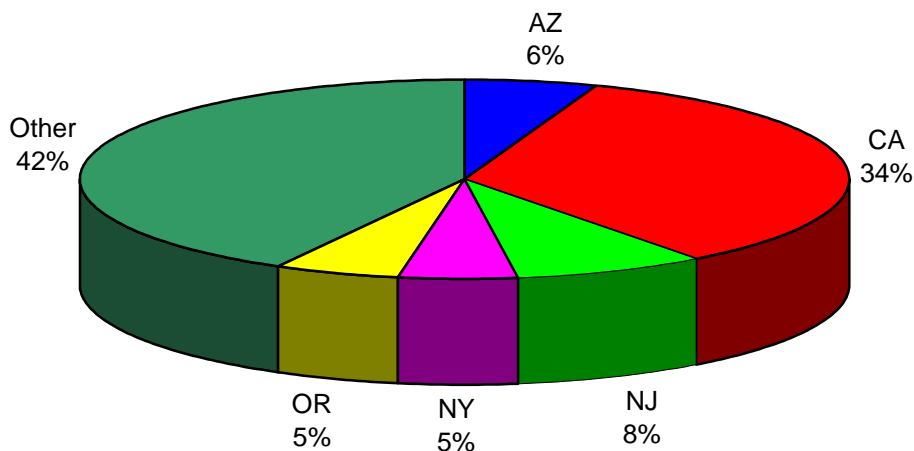
Lettuce of all types has long been a popular base ingredient in salads. Romaine likely garnered much of its early popularity in the United States as the primary ingredient in the Caesar salad, which was said to be invented in Mexico during the 1920s by a chef who named it after himself. Although the Caesar salad is as popular as ever today, the scope of romaine lettuce has broadened considerably in the U.S. diet. Romaine is now a staple in the supermarket produce section in bulk displays, prepackaged romaine hearts, and a wide variety of prepackaged salads and salad kits. In the foodservice arena, romaine can be found on virtually every salad bar, in a wide variety of entrée salads, Greek salads, and various sandwich wraps (romaine leaves wrapped around filler such as chicken).

In 2002, the Census of Agriculture disclosed romaine separately from other lettuce for the first time. The Census indicated that 59,825 acres of romaine were produced by 709 farms in the United States. One-third of the farms with romaine are in California with the remainder spread over 37 other States. Production is highly concentrated, with just 5 percent of the Nation's annual crop produced outside of California (73 percent) and Arizona (22 percent).

The United States is the second largest producer of all lettuce in the world (21 percent), following China (48 percent) and well ahead of third-place Spain (5 percent). Although its share has been declining as leaf and romaine have gained in popularity, iceberg (head) lettuce still accounts for two-thirds of all the lettuce grown in the United States. During 2002-04, romaine lettuce accounted for 22 percent of all

Figure 11

### U.S. romaine lettuce: Number of farms, 2002

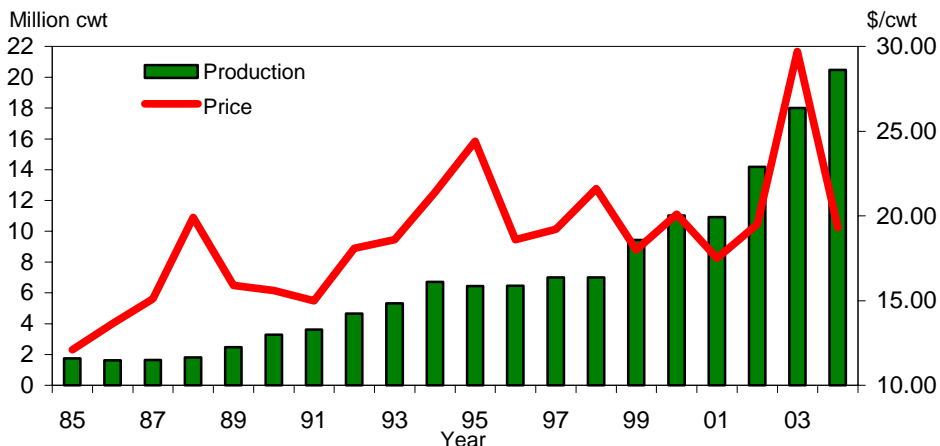


Source: 2002 Census of Agriculture, NASS, USDA.



Figure 12

**U.S. leaf & romaine lettuce: Production & shipping-point price**



Source: National Agricultural Statistics Service, USDA except for 1985-91 from the Calif. County Agricultural Commissioners.

lettuce produced in the United States, up from 8 percent during 1992-94. In 1992-94, more looseleaf lettuce (10 percent of the lettuce crop) was produced than romaine. Available year round, the production of romaine has increased dramatically over the past 15 years. During 2002-04, U.S. romaine production totaled 2.26 billion pounds—more than three times the output during 1992-94.

During 2002-04, the farm value of the U.S. romaine lettuce crop averaged \$534 million, up from \$131 million in 1992-94. The value of the romaine crop now exceeds that of crops such as carrots, cucumbers, cabbage, and cantaloup. California, by virtue of its year-round growing season, accounts for three-fourths of the romaine crop value. With lower productivity (yield) per acre, the season-average price for romaine usually exceeds that of head lettuce but is typically less than that of looseleaf lettuce.

The export market is very important for lettuce of all types. Lettuce is one of the most important vegetable crops exported from the United States. In 2002-04, the value of all lettuce exports was \$250 million, of which 59 percent was lettuce other than head lettuce (leaf and romaine). Romaine and looseleaf lettuces are grouped together under the same export and import codes, which makes determining their respective trade volumes difficult. Exports of romaine and leaf have more than doubled from 216 million pounds in 1992-94 to 461 million pounds in 2002-04.

In a reflection of strong domestic demand, although the volume of leaf and romaine lettuce exports more than doubled, the share of leaf and romaine supply exported actually decreased from 14 percent in 1992-94 to 13 percent in 2002-04. Most of the volume is shipped to Canada (91 percent in 2004) and Mexico (4 percent), with Japan rising to 3 percent of volume in 2004. Export volume is lowest during the summer (less than 20 percent of volume) since Canada’s farms are in production.

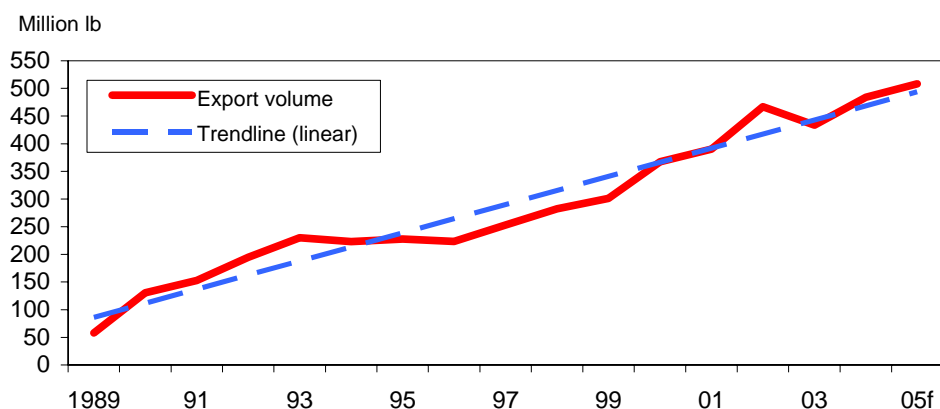
Similar to the head lettuce market, imports also play a minor role in the romaine lettuce market. The share of leaf and romaine consumption satisfied by imports has largely remained around 1 percent for the past 15 years. About two-thirds of imports enter during the summer. Imports averaged 34 million pounds in 2002-04, with most of the volume arriving from Canada (61 percent in 2004) and Mexico (36 percent).

In terms of domestic disappearance (also known as consumption), lettuce of all types is second only to potatoes, with total use averaging 9.7 billion pounds in 2002-04. Disappearance of leaf and romaine lettuce together averaged 3.2 billion pounds in 2002-04—up 138 percent from 1992-94 and one-third of all the lettuce consumed in the United States. Disappearance of romaine lettuce alone averaged about 2 billion pounds during 2002-04 (table 20)—up 240 percent since 1992-94. Domestic disappearance of romaine lettuce increased 81 percent from 2000 to 2004 alone.

Per capita use of romaine lettuce has tripled since 1992-94, when it averaged 2.3 pounds. By 2004, per capita use of romaine lettuce had reached a record 8.1 pounds—up more than 4 pounds since 1999. Among several factors, part of this explosive growth is likely due to the expanding use of romaine in the foodservice industry and the continued strength of retail fresh-cut salad sales. Since 2000, supermarket sales of fresh-cut salads have more than doubled to over \$3 billion.

Figure 13

**U.S. leaf & romaine export volume is trending higher**



Source: Bureau of the Census, USDC except 2005 forecast by ERS.

Table 20--U.S. romaine lettuce: Estimated supply, disappearance, and price

Year	Supply			Utilization			Season-ave. price	
	Production 1/	Imports 2/	Total	Exports 2/	Domestic	Per capita use	Current dollars 1/	Constant dollars 3/
	-- Million pounds --					Pounds	-- \$/cwt --	
1985	174.7	--	174.7	--	174.7	0.73	12.10	17.36
1990	328.3	3.7	332.0	40.4	291.6	1.17	15.60	19.12
2000	1,504.5	18.2	1,522.7	204.5	1,318.2	4.67	19.90	19.90
2001	1,506.7	19.7	1,526.4	222.2	1,304.2	4.57	19.30	18.85
2002	1,856.4	19.5	1,875.9	271.0	1,604.9	5.57	25.20	24.21
2003	2,253.8	20.4	2,274.2	267.2	2,007.0	6.90	27.60	26.04
2004	2,684.4	23.7	2,708.1	326.7	2,381.4	8.10	19.10	17.70
2005 f	2,765.0	25.4	2,790.4	343.0	2,447.4	8.25	--	--

-- = Not available. f = ERS forecast. 1/ Source: NASS, USDA except 1985 and 1990 from the California County Agricultural Commissioners reports. 2/ Estimated by ERS based on data from the Bureau of the Census, USDC. 3/ Constant-dollar prices calculated using the GDP deflator, 2000=100.

## Contacts and Links

### Contact Information

#### Gary Lucier

Tel: (202) 694-5253 Fax: (202) 694-5820 Email: [Glucier@ers.usda.gov](mailto:Glucier@ers.usda.gov)

#### Andy Jerardo

Tel: (202) 694-5266 Fax: (202) 694-5820 Email: [Ajerardo@ers.usda.gov](mailto:Ajerardo@ers.usda.gov)

Covers potatoes, sweet potatoes, long-run outlook

### Subscription Information

Subscribe to ERS' e-mail notification service <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).



### 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. *The Economics of Food Safety: The Case of Green Onions and Hepatitis A Outbreaks***

<http://www.ers.usda.gov/publications/vgs/nov04/VGS30501/>

Explains the economics of food safety using the example of recent hepatitis A outbreaks in the United States associated with green onions from Mexico. The report reviews the incentives to adopt additional food safety practices and the economic impact of an outbreak on green onion growers in Mexico.

#### **2. *How Much Do Americans Pay For Fruits and Vegetables?***

<http://www.ers.usda.gov/publications/aib790/>

Using ACNielsen Homescan data on 1999 household food purchases from all types of retail outlets, estimates the annual retail price per pound and price per serving for 69 forms of fruits and 85 forms of vegetables. Consumers can meet the recommendation of three servings of fruits and four servings of vegetables daily for 64 cents. The [data used in the report](#) are also available in Excel (\*.xls) spreadsheets.

#### **3. *Traceability in the U.S. Food Supply: Economic Theory and Industry Studies***

<http://www.ers.usda.gov/publications/aer830/>

Describes the results of an investigation into the amount, type, and adequacy of traceability systems in the United States, focusing particularly on the fresh produce sector, among others. Findings indicate that private sector firms have developed a substantial capacity to trace. For additional information, see the ERS [Traceability in the U.S. Food Supply](#) briefing room.

#### **4. Organic Produce, Price Premiums, and EcoLabeling in U.S. Farmers' Markets** <http://www.ers.usda.gov/publications/VGS/Apr04/vgs30101/>

Describes how the popularity of farmers' markets in the United States has grown concurrently with organic production and consumer interest in locally and organically produced foods. This research, based on interviews with 210 market managers, describes the significance of these markets as outlets for many organic farmers, and recent shifts in relationships between organic growers, market managers, and customers.



#### **Data Tables**

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

##### **1. Per capita use (consumption)**

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

##### **2. 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>

##### **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 and harvested area

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

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

### 12. Mexican and Canadian vegetable production

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

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

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

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

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

### Web Sites

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

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

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

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

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

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

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

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

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

<http://www.ams.usda.gov/fv/mnacs/index.htm>

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

<http://usda.mannlib.cornell.edu/reports/nassr/fruit/pvg-bb/>

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

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

**H. Organic Farming and Marketing:** USDA, ERS briefing room contains articles, data, graphics, and links.

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

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.

**Price table 1--Commercial vegetables and potatoes: Indexes of prices received by U.S. growers, by month, 1995-2005 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	572	718	906	873	785	795	862	957	834	963	769	807
	2001	810	980	923	916	964	805	837	968	894	688	731	1,144	888
	2002	1,054	1,283	1,816	803	770	731	771	807	795	704	735	694	914
	2003	753	757	823	878	932	1,047	809	937	979	960	1,058	1,134	922
	2004	918	1,038	789	906	795	755	835	920	907	1,102	1,192	840	916
	2005	702												
Potatoes 3/	1995	466	450	484	505	529	612	729	586	497	539	548	547	541
	1996	564	589	633	668	696	707	700	521	482	461	452	434	576
	1997	426	431	433	433	477	431	499	544	440	433	457	477	457
	1998	491	524	554	546	559	539	517	481	449	415	450	475	500
	1999	489	497	520	546	532	557	610	517	451	429	474	463	507
	2000	475	496	519	545	529	511	559	464	406	384	383	395	472
	2001	409	450	437	466	453	486	532	632	516	461	538	578	497
	2002	620	645	715	699	748	806	884	651	520	466	524	547	652
	2003	533	554	567	592	590	559	570	483	458	443	481	494	527
	2004	491	508	530	585	563	560	513	521	488	452	487	504	517
	2005	513												
--1990-92=100--														
Commercial vegetables 2/	1995	120	116	148	174	155	121	98	102	117	97	98	101	121
	1996	94	111	147	122	103	116	99	116	102	109	112	96	111
	1997	111	105	118	113	106	112	112	122	119	145	122	136	118
	1998	122	116	125	156	129	110	121	114	114	133	113	117	123
	1999	105	112	121	130	118	110	104	106	105	97	98	116	110
	2000	98	86	107	136	131	117	119	129	143	125	144	115	121
	2001	121	147	138	137	144	120	125	145	134	103	109	171	133
	2002	158	192	272	120	115	109	115	121	119	105	110	104	137
	2003	113	113	123	131	140	157	121	140	146	144	158	170	138
	2004	137	155	118	136	119	113	125	138	136	165	178	126	137
	2005	105												
Potatoes 3/	1995	92	89	96	100	105	121	144	116	98	106	108	108	107
	1996	111	116	125	132	138	140	138	103	95	91	89	86	114
	1997	84	85	86	85	94	85	99	107	87	85	90	94	90
	1998	97	104	109	108	111	106	102	95	89	82	89	94	99
	1999	97	98	103	108	105	110	121	102	89	85	94	91	100
	2000	94	98	103	108	105	101	110	92	80	76	76	78	93
	2001	81	89	86	92	90	96	105	125	102	91	106	114	98
	2002	123	127	141	138	148	159	175	129	103	92	104	108	129
	2003	105	110	112	117	117	110	113	96	90	87	95	98	104
	2004	97	100	105	116	111	111	101	103	96	89	96	100	102
	2005	101												

1/ Prices for 2005 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, 1996-2005 1/**

Item	Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Annual	Prct Change	
															Jan - Jan	Percent
--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	-21.4	
	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	26.5	
	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	-0.9	
	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	-15.6	
	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	32.1	
	2002	146.1	188.7	242.5	101.7	107.2	123.2	127.1	125.4	116.7	126.9	127.4	119.0	137.7	-0.6	
	2003	147.8	127.5	153.0	167.7	165.0	138.8	133.3	136.6	164.7	156.9	148.4	184.7	152.0	1.2	
	2004	143.8	125.9	140.3	133.1	132.9	101.0	102.8	128.3	141.9	200.3	211.1	143.7	142.1	-2.7	
	2005	122.0														-15.2
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	0.9	
	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	-0.2	
	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	-0.5	
	2000	121.3	120.8	121.2	120.9	121.2	121.5	121.1	120.9	121.1	121.6	121.7	121.3	121.2	0.6	
	2001	121.4	121.4	121.3	121.3	121.4	121.9	124.1	124.9	125.3	126.5	128.0	128.1	123.8	0.1	
	2002	128.3	128.2	128.0	128.2	128.3	128.0	127.7	129.4	128.7	129.5	129.1	129.1	128.5	5.7	
	2003	128.8	129.0	128.9	129.3	129.4	129.3	129.4	129.1	130.0	130.7	131.1	131.3	129.7	0.4	
	2004	131.5	131.7	131.9	131.9	131.7	132.8	133.0	133.3	133.4	134.7	135.6	135.8	133.1	2.1	
	2005	135.6														3.1
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	0.6	
	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	-0.6	
	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	0.5	
	2000	125.4	126.2	125.7	126.3	126.3	124.9	125.9	126.4	126.2	126.9	126.1	126.2	126.0	-0.3	
	2001	127.6	128.5	127.7	128.7	128.4	127.7	128.9	128.8	128.8	130.0	129.2	129.1	128.6	1.8	
	2002	130.0	131.1	130.1	131.2	130.7	129.7	131.4	131.3	131.5	132.2	131.9	132.6	131.1	1.9	
	2003	133.4	134.1	133.3	134.0	134.1	133.9	134.9	134.2	134.2	135.2	135.1	135.0	134.3	2.6	
	2004	135.1	136.0	135.3	135.3	134.3	134.7	135.4	135.8	136.8	137.3	136.9	136.7	135.8	1.3	
	2005	137.4														1.7
Dehydrated 4/	1996	143.3	143.3	144.6	146.6	147.3	147.6	146.9	146.1	145.8	145.3	145.5	145.7	145.7	--	
	1997	144.6	144.6	143.6	143.1	141.1	141.1	141.1	141.0	141.1	141.4	139.7	141.1	142.0	0.9	
	1998	142.0	141.1	140.8	140.5	143.2	143.2	142.2	144.9	143.6	142.9	142.0	146.2	142.7	-1.8	
	1999	148.0	148.0	148.4	147.7	146.1	146.1	146.0	146.5	147.1	146.7	147.4	151.1	147.4	4.2	
	2000	148.9	149.8	149.9	149.5	149.3	149.0	148.6	144.9	144.0	144.9	143.4	140.8	146.9	0.6	
	2001	139.1	135.6	136.2	136.9	139.9	140.6	140.4	140.9	142.4	142.7	144.6	145.9	140.4	-6.6	
	2002	148.2	149.3	150.3	151.0	150.1	151.2	152.6	152.3	151.2	151.1	150.2	151.1	150.7	6.5	
	2003	150.6	150.2	149.8	147.8	147.5	147.3	146.5	145.2	144.2	143.3	143.5	146.1	146.8	1.6	
	2004	145.4	145.1	144.5	144.4	144.2	144.2	144.3	144.1	145.7	145.7	143.3	144.5	144.6	-3.5	
	2005	145.4														0.0

-- = not available. 1/ Indexes for 2005 are preliminary. 2/ Excludes potatoes. 3/ Includes vegetable juices. 4/ Includes both fruits and vegetables.

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





**Price table 5--Fresh vegetables: U.S. average retail prices, by month, 1996-2005**

Item	Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Annual	Change from yr
															earlier, Jan.
															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	-13.0
	1998	36.2	36.2	36.8	36.9	38.1	39.0	39.2	38.2	37.6	37.9	37.0	37.5	37.6	8.1
	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	5.2
	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	2.9
	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	20.0
	2003	48.3	47.2	46.3	46.6	46.6	46.2	46.4	46.4	44.4	44.1	43.8	43.9	45.9	13.4
	2004	45.7	44.6	45.9	46.1	43.5	46.2	47.1	46.4	44.6	45.0	44.3	44.9	45.4	-5.4
	2005	45.8													0.2
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	5.9
	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	25.6
	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	-18.6
	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	5.3
	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	-16.5
	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	39.2
	2003	112.2	110.1	119.9	113.9	115.1	112.7	113.3	109.3	130.3	135.8	131.2	135.6	120.0	-18.3
	2004	131.9	121.6	112.5	102.2	110.7	106.0	106.9	106.7	120.8	139.9	133.5	141.4	119.5	17.6
	2005	123.5													-6.4
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	-15.3
	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	64.7
	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	-39.5
	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	15.3
	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	-1.6
	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	36.3
	2003	73.4	68.2	65.5	72.3	79.5	83.2	80.8	70.9	89.8	85.8	92.7	125.5	82.3	-26.8
	2004	87.6	80.5	81.3	80.1	71.0	75.1	73.7	80.8	77.1	83.0	84.9	82.3	79.8	19.3
	2005	81.7													-6.7
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	10.0
	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	19.7
	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	31.1
	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	-24.2
	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	-2.0
	2002	145.1	129.8	129.2	131.9	133.2	129.9	124.3	118.1	115.8	123.6	143.0	165.5	132.5	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	153.3	150.9	17.9
	2004	147.2	151.0	152.9	151.9	151.0	133.1	125.3	131.2	132.1	171.5	233.7	246.7	160.6	-14.0
	2005	166.0													12.8

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









**Price table 10--U.S. fresh-market herbs: Selected monthly wholesale prices in San Francisco, CA, 2003-2005**

Herb	Unit	2003/04			2004/05			Change from prev. year		
		Dec.	Jan.	Feb.	Dec.	Jan.	Feb. *	Dec.	Jan.	Feb.
		-- \$/cwt --						--- Percent ---		
Anise	24-ct crtn	11.50	18.50	12.75	18.00	32.00	20.50	56.5	73.0	60.8
Arrugula	12-ct ctns	8.00	8.50	8.00	7.50	7.50	8.25	- 6.3	- 11.8	3.1
Basil	12-ct ctns	7.75	8.75	9.00	7.50	7.75	7.50	- 3.2	- 11.4	- 16.7
Celeriac	12-ct ctns	10.50	11.25	11.25	10.50	10.50	10.50	.0	- 6.7	- 6.7
Chervil	12-ct flmbag	7.25	7.25	7.50	7.00	7.00	7.00	- 3.4	- 3.4	- 6.7
Chives	12-ct flmbag	4.75	4.75	4.75	4.50	6.25	4.50	- 5.3	31.6	- 5.3
Cilantro	60-ct ctns	13.50	11.50	15.00	14.00	19.25	16.75	3.7	67.4	11.7
Dill	12-ct ctns	7.00	8.00	8.00	6.75	6.75	7.50	- 3.6	- 15.6	- 6.3
Horseradish	50-lb sack	2.05	2.05	2.10	1.95	1.95	2.00	- 4.9	- 4.9	- 4.8
Oregano	12-ct flmbag	6.00	6.00	5.50	5.50	7.25	5.50	- 8.3	20.8	.0
Rosemary	12-ct flmbag	6.00	6.00	6.00	5.13	6.50	5.50	- 14.5	8.3	- 8.3
Mint	12-ct ctns	8.50	8.75	8.25	7.00	7.50	7.75	- 17.6	- 14.3	- 6.1
Salsify	5-1kg flmbg	17.50	17.50	18.25	22.00	26.50	26.50	25.7	51.4	45.2
Thyme	12-ct flmbag	6.00	6.00	5.50	5.50	6.50	5.50	- 8.3	8.3	.0
Sage	12-ct flmbag	6.00	6.00	5.50	5.50	6.50	5.50	- 8.3	8.3	.0
Watercress	12-ct ctns	7.50	8.00	8.00	8.00	8.00	9.00	6.7	.0	12.5

\* February 2005 prices are partial month averages.

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

**Price table 11--Farm-retail price spreads, 2001-04**

	Annual		2003			2004				
	2001	2002	2003	July	Feb	Mar	Apr	May	June	July
<b>Market basket 1/</b>										
Retail cost (1982-84=100)	177.2	180.3	185.3	184.8	191.3	192.0	192.0	195.2	196.4	196.6
Farm value (1982-84=100)	106.2	104.3	110.4	108.0	121.5	125.5	128.4	131.1	128.7	124.1
Farm-retail spread (1982-84=100)	215.4	221.2	225.6	226.3	228.9	227.9	226.3	229.7	232.9	235.7
Farm value-retail cost (%)	21.0	20.3	20.9	20.5	22.2	22.9	23.4	23.5	22.9	22.1
<b>Fresh fruit</b>										
Retail cost (1982-84=100)	291.7	298.0	309.0	312.0	305.1	309.3	316.4	327.9	337.7	334.7
Farm value (1982-84=100)	145.7	154.4	163.2	164.0	189.6	192.9	196.7	198.1	193.5	192.2
Farm-retail spread (1982-84=100)	359.1	364.2	376.3	380.3	358.4	363.1	371.7	387.8	404.3	400.5
Farm value-retail cost (%)	15.8	16.4	16.7	16.6	19.6	19.7	19.6	19.1	18.1	18.1
<b>Fresh vegetables</b>										
Retail cost (1982-84=100)	230.6	245.4	250.5	248.3	262.8	261.3	251.7	251.0	247.2	244.6
Farm value (1982-84=100)	129.9	145.8	149.9	136.7	155.1	155.4	151.3	137.8	124.6	118.8
Farm-retail spread (1982-84=100)	282.4	296.6	302.2	305.7	318.2	315.7	303.3	309.2	310.2	309.3
Farm value-retail cost (%)	19.1	20.2	20.3	18.7	20.0	20.2	20.4	18.6	17.1	16.5
<b>Processed fruits and vegetables</b>										
Retail cost (1982-84=100)	159.3	166.2	171.9	174.0	178.2	182.5	183.6	184.5	183.6	185.6
Farm value (1982-84=100)	107.9	110.5	108.4	109.1	122.0	121.9	121.9	122.3	121.8	122.0
Farm-retail spread (1982-84=100)	175.3	183.6	191.8	194.3	195.7	201.4	202.8	203.9	202.9	205.4
Farm value-retail cost (%)	16.1	15.8	15.0	14.9	16.3	15.9	15.8	15.8	15.8	15.6
<b>Fats and oils</b>										
Retail cost (1982-84=100)	155.7	155.4	157.4	156.3	162.3	166.2	166.2	169.4	171.3	171.9
Farm value (1982-84=100)	76.9	91.7	113.4	102.7	145.6	150.5	147.2	137.4	136.9	135.1
Farm-retail spread (1982-84=100)	184.7	178.9	173.5	176.0	168.4	172.0	173.2	181.2	184.0	185.4
Farm value-retail cost (%)	13.3	15.9	19.4	17.7	24.1	24.4	23.8	21.8	21.5	21.1
<b>Meat products</b>										
Retail cost (1982-84=100)	159.3	160.3	169.0	168.0	180.2	179.0	179.0	182.1	184.2	185.8
Farm value (1982-84=100)	97.4	102.6	108.4	108.7	113.0	113.4	114.5	116.4	117.4	117.6
Farm-retail spread (1982-84=100)	222.8	219.5	231.1	228.8	249.1	246.3	245.2	249.5	252.7	255.7
Farm value-retail cost (%)	31.0	32.4	32.5	32.8	31.8	32.1	32.4	32.4	32.3	32.1
<b>Dairy products</b>										
Retail cost (1982-84=100)	167.1	168.1	167.9	164.7	172.1	171.9	174.0	185.9	188.8	187.7
Farm value (1982-84=100)	118.5	97.6	99.1	94.7	107.6	115.6	139.0	156.5	145.1	128.8
Farm-retail spread (1982-84=100)	211.8	233.1	231.3	229.2	231.6	223.8	206.3	213.0	229.1	242.0
Farm value-retail cost (%)	34.0	27.8	28.3	27.6	30.0	32.3	38.3	40.4	36.9	32.9
<b>Poultry</b>										
Retail cost (1982-84=100)	164.9	167.0	169.1	168.9	174.1	177.8	178.1	181.6	182.6	184.9
Farm value (1982-84=100)	126.2	102.0	113.0	113.6	144.3	145.1	148.9	155.1	161.3	162.1
Farm-retail spread (1982-84=100)	209.3	242.0	233.7	232.6	208.4	215.4	211.8	212.1	207.1	211.2
Farm value-retail cost (%)	41.0	32.7	35.8	36.0	44.4	43.7	44.7	45.7	47.3	46.9
<b>Eggs</b>										
Retail cost (1982-84=100)	136.4	138.2	157.3	149.6	194.1	198.9	187.0	170.1	163.7	159.0
Farm value (1982-84=100)	74.3	72.1	102.0	90.1	128.0	171.9	105.5	80.4	85.2	68.6
Farm-retail spread (1982-84=100)	248.0	256.9	256.5	256.6	312.8	247.5	333.4	331.2	304.6	321.5
Farm value-retail cost (%)	35.0	33.5	41.7	38.7	42.4	55.5	36.3	30.4	33.5	27.7
<b>Cereal and bakery products</b>										
Retail cost (1982-84=100)	193.8	198.0	202.8	204.5	204.4	204.8	205.5	206.0	206.8	207.2
Farm value (1982-84=100)	78.8	86.4	93.5	86.1	108.2	109.9	113.0	109.1	108.2	102.8
Farm-retail spread (1982-84=100)	209.9	213.6	218.0	221.0	217.8	218.0	218.4	219.5	220.6	221.8
Farm value-retail cost (%)	5.0	5.3	5.6	5.2	6.5	6.6	6.7	6.5	6.4	6.1

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

Source: <http://www.ers.usda.gov/publications/agoutlook/aotables/aug2004/aotab08.xls>