Characterizing U.S. Fruit and Vegetable Production

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The Fruit and Vegetable Industry

- **Census of Agriculture** reports area and production for over 100 fruit and vegetable commodities or groups of commodities.

- Some are annuals and some are perennials.

- Some grown for direct consumption, such as fresh-market apples, grapes, and tomatoes, while others for processing into products such as orange juice, tomato sauce, and frozen sweet corn.
U.S. Farm Cash Receipts for Crops

<table>
<thead>
<tr>
<th>Category</th>
<th>2003-05</th>
<th>1990-92</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food grains</td>
<td>30%</td>
<td>15%</td>
</tr>
<tr>
<td>Feed crops</td>
<td>16%</td>
<td>9%</td>
</tr>
<tr>
<td>Cotton &amp; tobacco</td>
<td>18%</td>
<td>26%</td>
</tr>
<tr>
<td>Oil crops</td>
<td>23%</td>
<td>16%</td>
</tr>
<tr>
<td>Fruit &amp; vegetables</td>
<td>7%</td>
<td>10%</td>
</tr>
<tr>
<td>Other crops</td>
<td>6%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Vegetable Crops With Highest Farm Cash Receipts

- Potatoes
- Lettuce
- Tomatoes
- Mushrooms
- Onions
- Sweet corn
- All peppers
- Broccoli
- Carrots
- Dry Beans

Source: Economic Research Service, USDA.
Fruit and Tree Nut Crops With Highest Farm Cash Receipts

Source: Economic Research Service, USDA.
Factors driving the upward trend in U.S. fruit and vegetable production over the last 50 years

- Improvements in production management and technology
- Growth in domestic consumption
- Expansion in export sales
Number of Fruit and Vegetable Farms in the United States

- Pulses
- Potatoes*
- Vegetables**
- Tree fruit
- Berries

* Includes sweet potatoes.
** Includes dried herbs.

Source: 2002 Census of Agriculture, National Agricultural Statistics Service, USDA.
Harvested Acres of U.S. Fruit and Vegetable Farms

* Includes sweet potatoes.
** Includes dried herbs.

Source: Census of Agriculture, National Agricultural Statistics Service, USDA.
Growth in U.S. Fruit and Vegetable Production Slows in Recent Years

Sources: Citrus Fruits Summary, Noncitrus Fruits and Nuts Summary, Vegetables, Crop Production, and Mushrooms, National Agricultural Statistics Service, USDA.
Factors slowing production growth:

- Weather and disease problems
- Global competition
- Competition with urban land development
Average U.S. Consumption of Fruits and Vegetables

Pounds per person, farm-weight

*Melons, dry peas & lentils, dry beans, and mushrooms are included.
Source: Calculated by Economic Research Service, USDA.
U.S. Per Capita Consumption of Vegetables and Melons

- Fresh: 39.1%
- All potatoes: 29.8%
- Canning: 22.7%
- Freezing: 4.8%
- Pulses: 1.6%
- Sweet potatoes: 1.0%
- Mushrooms: 0.9%

*Average product share 2002-2006.
Source: Calculated by Economic Research Service, USDA.
Harvested Acres in the U.S. Vegetable and Melon Industry

Source: Vegetables and Crop Production, National Agricultural Statistics Service, USDA.
Harvested Area for Select Fresh-Market Vegetables and Melons

Source: *Vegetables Annual Summary*, National Agricultural Statistics Service, USDA.
Harvested Acres of Select Processing Vegetables

Source: Vegetables Summary, National Agricultural Statistics Service, USDA.
Fresh Vegetable Production Increasing Slowly*

*Fresh output includes melons; Both fresh and processing excludes potatoes, sweet potatoes, pulses, and mushrooms. 

Source: Vegetables, National Agricultural Statistics Service, USDA.
Production of Select Fresh-Market Vegetables and Melons

Source: Vegetables Annual Summary, National Agricultural Statistics Service, USDA.
Production of Select Processing Vegetables

Source: *Vegetables Summary*, National Agricultural Statistics Service, USDA.
Land Used for Vegetables, 2002

**Share of Hired Workers in U.S. Vegetable and Melon Farms: Top 10 States***

<table>
<thead>
<tr>
<th>State</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>California</td>
<td>26.3</td>
</tr>
<tr>
<td>Florida</td>
<td>11.4</td>
</tr>
<tr>
<td>Washington</td>
<td>6.4</td>
</tr>
<tr>
<td>Idaho</td>
<td>5.0</td>
</tr>
<tr>
<td>Arizona</td>
<td>4.0</td>
</tr>
<tr>
<td>Michigan</td>
<td>3.9</td>
</tr>
<tr>
<td>Oregon</td>
<td>3.8</td>
</tr>
<tr>
<td>Georgia</td>
<td>3.7</td>
</tr>
<tr>
<td>New York</td>
<td>3.4</td>
</tr>
<tr>
<td>Colorado</td>
<td>3.0</td>
</tr>
</tbody>
</table>

* Combined share accounted for 71 percent of total in 2002.
Hired Versus Contract Labor As A Share of Wages in U.S. Vegetable and Melon Farms*

*Top 10 States accounted for 81 percent of total wages in 2002.
U.S. Per Capita Fruit and Tree Nuts Consumption*

*Average product share 2001-05.
Source: Calculated by Economic Research Service, USDA.
U.S. Fruit Production in Declines in Recent Years

P = Preliminary.
Source: Citrus Fruit Summary and Noncitrus Fruit and Nuts Summary, National Agricultural Statistics Service, USDA.
Fruit and Tree Nuts Bearing Acreage

P = preliminary.
Source: Citrus Fruits Summary and Noncitrus Fruits and Nuts Summary, National Agricultural Statistics Service, USDA.
Based on 2005 utilized production of 18,299,000 short tons, fresh-equivalent. Source: Noncitrus Fruit and Nuts Summary, National Agricultural Statistics Service, USDA.
Composition of Major U.S. Citrus Fruit Production

Source: *Citrus Fruit Summary*, National Agricultural Statistics Service, USDA.
U.S. Land in Orchards, 2002

U.S. Berry Acres, 2002

Share of Hired Workers in U.S. Fruit and Tree Nut Farms: Top 5 States*

* Combined share accounted for 86 percent of total in 2002.
Hired Versus Contract Labor As A Share of Wages in U.S. Fruit and Tree Nut Farms*

*Top 5 States accounted for 89 percent of total wages in 2002.
Change In Bearing Acreage of Select U.S. Fruit and Tree Nuts

P = preliminary.
* Most recent year is 2005.

Source: *Citrus Fruit Summary and Noncitrus Fruit and Nuts Summary*, National Agricultural Statistics Service, USDA.
U.S. Tree Nut Production Grows

P = Preliminary.
Source: *Noncitrus Fruits and Nuts Summary*, National Agricultural Statistics Service, USDA.
U.S. Strawberry Production*

* Average rate of growth relatively steady at over 4.0 percent.
P=preliminary.
Source: *Noncitrus Fruit and Nuts Summary*, NASS, USDA.
U.S. Production of Other Berries Also Expanding

Million pounds

<table>
<thead>
<tr>
<th></th>
<th>Blueberries</th>
<th>Raspberries</th>
<th>Cranberries</th>
<th>Blackberries</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1992</strong></td>
<td>100</td>
<td>150</td>
<td>200</td>
<td>250</td>
</tr>
<tr>
<td><strong>1994</strong></td>
<td>125</td>
<td>175</td>
<td>225</td>
<td>275</td>
</tr>
<tr>
<td><strong>1996</strong></td>
<td>150</td>
<td>200</td>
<td>250</td>
<td>300</td>
</tr>
<tr>
<td><strong>1998</strong></td>
<td>175</td>
<td>225</td>
<td>275</td>
<td>325</td>
</tr>
<tr>
<td><strong>2000</strong></td>
<td>200</td>
<td>250</td>
<td>300</td>
<td>350</td>
</tr>
<tr>
<td><strong>2002</strong></td>
<td>225</td>
<td>275</td>
<td>325</td>
<td>375</td>
</tr>
<tr>
<td><strong>2004</strong></td>
<td>250</td>
<td>300</td>
<td>350</td>
<td>400</td>
</tr>
<tr>
<td><strong>2006</strong></td>
<td>275</td>
<td>325</td>
<td>375</td>
<td>425</td>
</tr>
</tbody>
</table>

Average rate of increase in production (percent)

<table>
<thead>
<tr>
<th>Period</th>
<th>Blueberries</th>
<th>Raspberries</th>
<th>Cranberries</th>
<th>Blackberries</th>
</tr>
</thead>
<tbody>
<tr>
<td>1990s</td>
<td>4.5</td>
<td>3.1</td>
<td>6.9</td>
<td>1.0</td>
</tr>
<tr>
<td>2000s</td>
<td>6.1</td>
<td>8.5</td>
<td>1.5</td>
<td>2.4</td>
</tr>
</tbody>
</table>

P=Preliminary.
Source: Noncitrus Fruits and Nuts Summary, NASS, USDA.
*Excludes wine, essential oils, malt beverages, cut flowers, and nursery stock.

Import share of total domestic fruit and vegetable disappearance*

*Fresh and processing. Vegetables includes melons and fruit includes bananas and olives. Source: USDA, Economic Research Service.
Imports share of total domestic fresh fruit and vegetable disappearance