Lettuces, including head (iceberg) and leaf (romaine, butterhead, baby, and other leaf types), are the most valuable US vegetable. Most US lettuce is produced in California (70 percent of US production) and Arizona (30 percent). In 2019, six percent of iceberg lettuce and 13 percent of romaine, butterhead, and other leaf lettuces were imported, but imports are rising fast. Americans have been shifting from head to other lettuces, so that each type was about half of the 25 pounds per person available in 2019.

Lettuce is produced by vertically integrated grower-shippers who plant, harvest, and sell lettuce year-round to bagged salad firms, supermarket chains, and food-service firms. There are many growing, harvesting, and value-added arrangements. Some bagged salad firms grow and harvest their own lettuce. Others contract with farmers to grow lettuce that the salad firm harvests, and some salad firms buy lettuce that is grown and harvested for them. Many grower-shippers plant, harvest, and sell heads of lettuce under their own or a retailer’s brand.

The Salinas Valley or the US Salad Bowl ships lettuce and other leafy greens between May and October. Grower-shippers move some equipment and workers to the San Joaquin Valley for the November harvest before another move to the desert areas of Yuma, Arizona and the Imperial Valley of California between December and March. Lettuce production returns to Salinas via the San Joaquin Valley in March-April.

US fresh vegetable acreage is trending down, but production is up due to rising yields. Six commodities, potatoes, sweet corn, lettuce, sweet potatoes, tomatoes, and onions, account for most US fresh vegetable acreage, led by 1.3 million acres of potatoes, 600,000 acres of sweet corn, and 375,000 acres of lettuce. The US acreage of lettuce and sweet potatoes is increasing, while the acreage of sweet corn and tomatoes is decreasing.

**Production**

There were 114,000 acres of head lettuce planted in 2020, 63,000 acres of leaf lettuces, and 93,000 acres of romaine. Farmers plant weekly so they can harvest year-round, and many plant extra acres to ensure they have a sufficient supply to fulfill their contracts, which is why about 1,000 acres of each type of lettuce was not harvested in 2020.

Lettuce yields have been rising and averaged 360 cwt or 18 tons an acre for head lettuce in 2020, 253 cwt or 12.5 tons an acre for leaf, and 330 cwt or 16 tons an acre for romaine. Head lettuce was worth $1.3 billion in 2020, leaf $0.8 billion, and
romaine $950 million, for a total of $3 billion.

California had 80,000 acres of head lettuce in 2020 and Arizona 34,000, California yields were higher at 380 cwt per acre, and grower prices were the same in the two states at $31 per cwt or $0.31 a pound. California had 53,000 acres of leaf lettuce in 2020 and Arizona 10,000, California yields were higher at 255 cwt per acre, and grower prices were higher in Arizona at $62 per cwt or $0.63 a pound versus $0.50 in California. California had 69,000 acres of romaine lettuce in 2020 and Arizona 24,000, California yields were higher at 335 cwt per acre, and grower prices were similar, $33 per cwt or $0.33 a pound in Arizona and $0.31 in California.

Production of head lettuce is declining as consumers switch to leaf and romaine lettuces. Per capita availability of all types of lettuce was almost 26 pounds per person in 2020, including over 14 pounds of leaf and romaine and 12 pounds of head lettuce.

Grower prices for organic lettuce are higher than the price received for conventional lettuce, with the largest gap for specialty lettuces, such as the $0.90 versus $0.45 a pound for organic and conventional green and red leaf lettuces in 2021. The organic premium was similar for romaine, $0.50 versus $0.25 a pound, but was smaller for iceberg, $0.35 a pound for organic versus $0.20 a pound for conventional.

The US had 3,300 farms with 224,000 acres of certified organic vegetables in 2019, including 1,100 farms with 38,500 certified organic acres of lettuce, 900 farms with 24,000 certified organic acres of potatoes, and 600 farms with 23,000 certified organic acres of spinach. Certified organic vegetable acreage almost doubled between 2011 and 2019.

**Trade**

Americans have fresh fruits and vegetables available year round, which requires imports when weather and other factors limit US production. Imports decrease when US production peaks during the summer months and rise during the shoulder periods when there is less US production in spring and fall. These shoulder seasons often provide the highest prices to US growers, prompting complaints about “unfair” competition from fresh vegetable imports, which are almost all from Mexico.

The US imported 60 percent of its fresh fruit and 33 percent of its fresh vegetables in 2020. Half of the fresh fruit imports, and three-fourths of the fresh vegetable imports, are from Mexico. There are several reasons for rising imports of fresh vegetables from Mexico, including lower labor costs, cheaper land that can grow certified organic produce because it has not been fertilized, and significant investment in various types of Controlled Environment Agriculture (CEA) structures to protect growing plants.

Mexico provides 90 percent of organic fresh vegetable imports and 80 percent of CEA vegetable imports. The volume of field-
grown fresh vegetable exports from Mexico to the US is twice the volume of CEA fresh vegetable exports to the US, but Mexican CEA imports are rising much faster than imports from open-field production.

US CEA production of cucumbers, bell peppers, tomatoes and other fresh vegetables is also rising as consumers demonstrate a willingness to pay for high-quality produce that is often grown close to where they live.

Lettuce imports doubled between 2020 and 2021, more than for any other fresh vegetable. Most US lettuce, onions, and celery are produced in the US, but most fresh tomatoes are imported, and fresh tomato imports rose in 2021.

The US has an agricultural trade surplus, but a deficit in fresh vegetable trade. Fresh vegetable imports were $10 billion in 2021 while exports were $2.5 billion, for a deficit of $7.5 billion. The big 4 imported fresh vegetables, tomatoes worth $2 billion in 2021, bell peppers worth $1.2 billion, cucumbers worth $0.7 billion, and asparagus worth $0.5 billion, accounted for almost half of fresh vegetable imports.
The Farm-to-Retail Price Spread for Beef and Pork Widened During Covid

Selected domestic and import fresh market vegetable shipments, January–September, 2020–21
Volume (10 million pounds)

Source: https://www.ers.usda.gov/publications/pub-details/?pubid=102664

The Farm-to-Retail Price Spread for Beef and Pork Widened During Covid

Fresh vegetable import values, 2018–21
Billion dollars

Source: https://www.ers.usda.gov/publications/pub-details/?pubid=102664

References

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