

RGV Small Acreage

SAP-001

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U.S. Demand for Fresh Vegetables

From a traditional Cobb salad to the natural and vibrant colors inspiring infinite social media food posts. Vegetables are a key component of the American diet. In 2017, over 4.37 million acres of vegetables were harvested across the country to satisfy the growing demand for vegetables of our society. Besides nourishing our bodies, vegetables are also good for the economy. In fact, the 2017 vegetable crop was estimated to have a market value of about \$20.33 billion.

Freshness is a valuable attribute in the eye and palate of consumers. According to the 2017 Census of Agriculture. About 60 percent of the harvested vegetable acres were sold for the fresh market and the remaining 40 percent was used for processing. California is the major producing state with over 870,000 acres dedicated to growing vegetables for fresh consumption, followed by Florida, Idaho and Arizona (Figure 1). In terms of crop value, the main fresh vegetables produced in the country are lettuce, potatoes, melons, tomatoes and broccoli. These five crops account for over \$6.61 billion in sales (Figure 2).

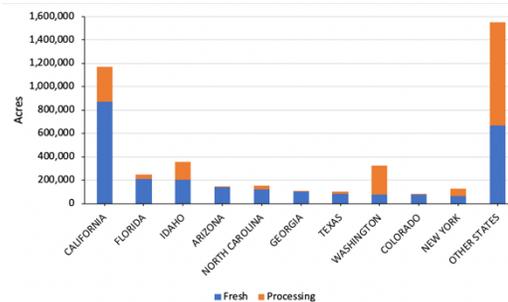


Figure 1. Vegetable Harvested Acres for Fresh Market and Processing by State, 2017. Source: 2017 Census of Agriculture

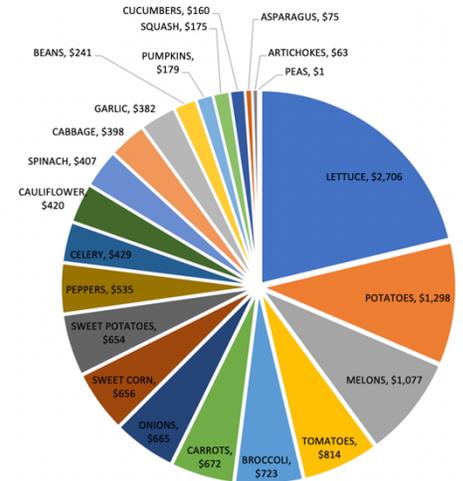


Figure 2. Top Fresh Vegetables Produced in Terms of Value (million \$), 2018. Source: USDA NASS

As showed in Figure 3, the overall consumption of vegetables has increased over time with a clear substitution of processed vegetables by fresh vegetables. On average, it is estimated that every American consumes 413 pounds of vegetables a year, of which 225 pounds (or 55 percent) are fresh vegetables. But that was not always the case. In 1980, the per capita availability of fresh vegetables was 347 pounds with almost 52 percent represented by processed vegetables.

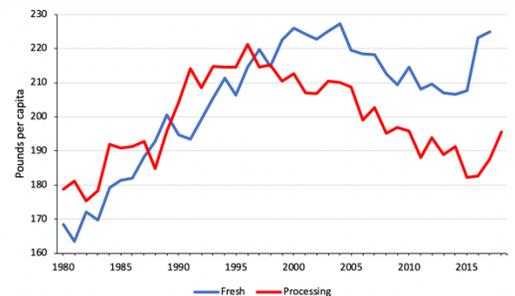


Figure 3. U.S. Vegetables per Capita Availability, 1980-2018. Source: ERS

Despite significant improvements in productivity achieved in recent years, national production has not been able to keep pace with the growing domestic demand for fresh vegetables (Figure 4). In 2017, a total of 65.89 billion pounds of fresh vegetables were demanded in the U.S. compared to the 50.77 billion pounds produced locally. The shortage of U.S.-produced fresh vegetables increased from 620 million pounds in 1970 to over 15,500 million pounds in 2017.

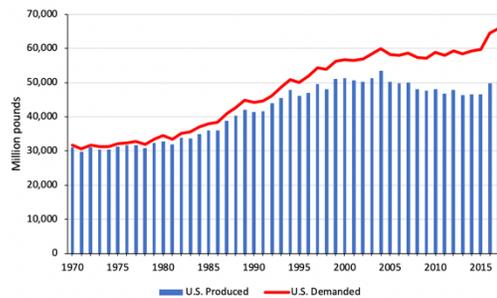


Figure 4. U.S. Production and Demand for Fresh Vegetables, 1970-2017. Source: USDA ERS

Last year, a total of 17.31 billion pounds of fresh vegetables with a value of over \$8,502 million were imported from foreign countries. Top suppliers of fresh vegetables to the U.S. are Mexico, Canada, China, Peru, Central American countries, and the Netherlands (Figure 5). Particularly, \$7,391 million (or 87 percent) were imported from our neighbors, Mexico and Canada.

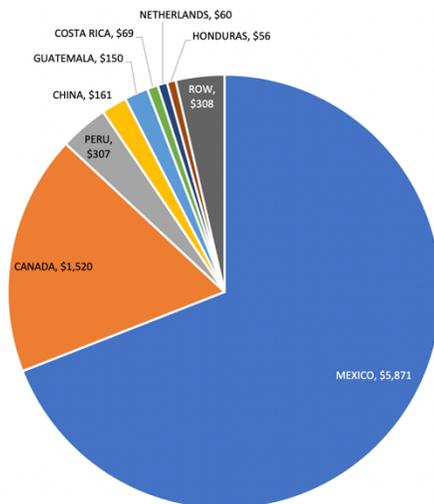


Figure 5. Value of Fresh Vegetable Imports by Country, 2018. Source: USDA FAS

The proportion of imported products varies by vegetable. For example, almost 99 percent of all fresh asparagus available in the market are imported. Other vegetables with a high share of imports include cucumbers (80%), artichokes (78%), bell peppers (68%), tomatoes (61%) and eggplant (60%). On the other hand, domestic products dominate the market for fresh vegetables such as celery, sweet corn, head lettuce, spinach and sweet potatoes, where imports represent less than 10 percent of the market share. Figure 6 shows the proportion of imported fresh products for selected vegetables in 2018.

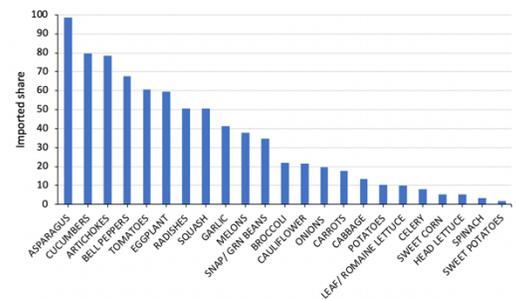


Figure 6. Imported Share of Selected Fresh Vegetables, 2018. Source: USDA ERS

Although the U.S. demand for fresh vegetables is expected to continue growing, external factors such as labor shortages, water scarcity, stricter production and sanitary regulations, and new trade agreements will play a significant role defining the availability of both domestic and international produce.

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