Commodity Highlight: Fresh-Market Cabbage

Cabbage belongs to the *Cruciferae* (mustard) family which includes Brussels sprouts, broccoli, cauliflower, and kale. The United States accounts for 4 percent of world cabbage production, ranking sixth behind China (38 percent of world output), India, Russia, South Korea, and Japan. U.S. cabbage production is largely centered in the east and upper Midwest, but commercial production can be found in each of the 50 States, with 82,000 acres and 4,289 farms shipping into the fresh and processing markets. New York is the top producer with 22 percent of national output, followed by California and Texas. The annual U.S. fresh-market cabbage crop had an average farm value of $311 million during 1999-2001. There is little overlap between U.S. fresh cabbage and sauerkraut markets with most cabbage for kraut grown under contract.

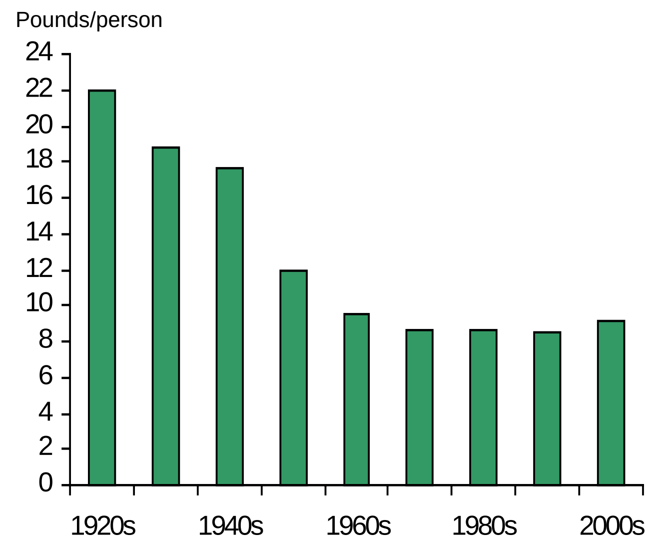
After languishing for decades, fresh-market cabbage consumption rose 8 percent between 1990-92 and 2000-02. Fresh-market cabbage consumption had averaged a fairly steady 8.5 pounds during the 1970s, 1980s, and 1990s. Over the past several years, renewed support for cabbage has come from the marketing of various fresh-cut products (fresh slaw products and the use of red cabbage in fresh-cut salad mixes), continued growth in away-from-home eating (important for cole slaw use), and a growing body of nutritional research favoring cruciferous vegetables like cabbage. Although fresh-market cabbage consumption rose to 9.1 pounds in the early 2000s, it is still 59 percent below the 1920s when use averaged 22 pounds per person.

According to ERS estimates, processed deli-type coleslaw (40 to 45 percent of use) and fresh head cabbage (around 35 percent) account for the majority of all cabbage disposition. Other major uses include sauerkraut (12 percent) and various fresh-cut products (5 to 10 percent). Retail sales of fresh-cut bagged cole slaw averaged about $70 million in 2000 and 2001--4 percent of the $2 billion retail fresh-cut salad industry. A small amount of cabbage is also dehydrated (dried, flakes, or powder) for use as a flavoring agent in soups and as an ingredient in other dehydrated foods.

Fresh-market cabbage shipments peak in March, spurred by the traditional St. Patrick's Day fare of corned beef and cabbage. About 14 percent of the domestic crop is marketed in March, compared with 10 percent for the next highest months of February and December. The majority of these winter shipments come from Texas, Florida, and New York. Volume is lowest in July at 4 percent of annual shipments.

Although trade plays a minor role in the industry, the United States is a net exporter of cabbage. In 2001, exports of fresh-market cabbage totaled $18 million while imports were valued at $14 million.

Figure 12
U.S. fresh cabbage: Per capita use



Source: Economic Research Service, USDA.

Table 13--U.S. fresh-market cabbage: Supply, utilization, and trade share, farm weight

Year	Supply			Utilization				Percent of:	
	Production 1/	Imports 2/	Total	Exports 2/	Shrink and loss 2/	Domestic	Per capita use	Use from imports 3/	Supply exported 3/
	-- Million pounds --						Pounds	-- Percent --	
1960	2,047.5	5.1	2,052.6	65.6	84.2	1,987.0	10.5	0.3	3.2
1970	1,866.9	7.7	1,874.6	61.1	35.2	1,813.5	8.7	0.4	3.3
1980	1,884.9	29.8	1,914.7	73.5	20.0	1,821.2	8.0	1.6	3.8
1990	2,163.4	88.2	2,251.6	59.2	107.1	2,085.3	8.3	4.2	2.6
1999	2,180.0	81.4	2,261.4	88.9	46.3	2,126.2	7.6	3.8	3.9
2000	2,599.0	89.9	2,688.9	85.2	40.0	2,563.7	9.1	3.5	3.2
2001	2,619.3	113.4	2,732.7	85.5	40.0	2,607.2	9.1	4.4	3.1
2002 f	2,700.0	95.0	2,795.0	95.0	45.0	2,655.0	9.1	3.6	3.4

f = ERS forecast. 1/ Source: National Agricultural Statistics Service, USDA except 1990 estimated by ERS based on available State data. 2/ Source: Bureau of the Census, U.S. Department of Commerce. 3/ Trade share of the domestic market.