

Commodity Highlight: Fresh Tomatoes

According to the 2002 Census of Agriculture, 19,539 farms produce tomatoes, with 30 percent of the acreage harvested for the fresh market. The United States is second only to China in the production of tomatoes (fresh and processing) with 11 percent of world output during 2001-03. Annual per capita use of fresh-market tomatoes is trending higher in the United States due to consumer preferences and the recognized nutritional value. One medium, fresh tomato (about 5.2 oz) has 35 calories and provides 40 percent of the USRDA of vitamin C and 20 percent of the vitamin A.

U.S. fresh field-grown tomato production has trended higher over the past several decades with the most substantial growth occurring during the 1980s (up 46 percent from the 1970s). As they have for decades, Florida and California annually account for about two-thirds of all commercially produced fresh-market tomatoes. Output in Florida, the largest fresh-market tomato-producing State, peaks during April and May and again from November to January. U.S. shipments peak in the spring and are the smallest and prices are the lowest August to September due to the availability of locally grown and home garden tomatoes. Ohio, Virginia, and Georgia round out the top five States with each accounting for 3 to 5 percent of national output.

Field-grown fresh-market tomatoes led in farm value along with potatoes and lettuce, with a farm value averaging \$1.22 billion during 2001-03. The industry estimates that fresh-market tomato retail value may exceed \$4 billion. According to a mid-1990s USDA food intake survey, in terms of consumption from all sources about 70 percent of fresh tomatoes are eaten at home, with 30 percent consumed away from home in various eating establishments.

Mexico and Canada are important suppliers of fresh market tomatoes to the United States, and Canada is the leading U.S. export market. Imports now account for

about 39 percent of U.S. tomato consumption, up from about 20 percent in the early 1990s. The percentage of U.S. fresh tomato supply that is exported has declined to about 6 percent in recent years after having averaged around 7 percent since the mid-1970s.

Over the past decade, greenhouse/hydroponic products have made significant inroads into the U.S. fresh tomato retail market, with Canada's burgeoning hothouse tomato industry wresting market share from Mexico. Florida and Mexico historically compete for the U.S. winter and early spring market. Imports from Mexico tend to peak in the winter when southern Florida is the predominant U.S. producer.

On average, the shipping-point price for fresh field-grown tomatoes averages about one-fourth of the retail value. This share has declined over the past two decades from an average of 37 percent during the 1980s and 31 percent in the 1990s as rising imports and competition with hothouse products have squeezed shipping-point prices for field-grown tomatoes.

In terms of consumption, tomatoes are fourth among fresh-market vegetables behind potatoes, lettuce, and onions, with total fresh-market use averaging 5.3 billion pounds in 2001-03. After remaining flat during the 1960s and 70s at 12.2 pounds, per capita use increased 19 percent during the 1980s, 13 percent during the 1990s, and 11 percent this decade. Per capita use reached a record 19.2 pounds in 2002. Because of expansion within the domestic greenhouse-hydroponic tomato industry since the mid-1990s (there are now over 500 acres grown under cover), it is likely per capita use is at least one pound higher than currently reported (USDA does not enumerate domestic greenhouse vegetable production).

For more on tomatoes, visit the ERS tomato briefing room at <http://www.ers.usda.gov/briefing/tomatoes>

Table 15--U.S. fresh-market tomatoes: Supply, disappearance, and price

Year	Supply			Utilization			Season-average price		
	Production 1/	Imports 2/	Total	Exports 2/	Domestic	Per capita use	Current dollars 1/	Constant dollars 3/	
	-- Million pounds --						Pounds	-- \$/cwt --	
1970	1,933.4	646.7	2,580.1	89.2	2,490.9	12.15	11.20	40.68	
1980	2,556.7	651.7	3,208.4	275.3	2,933.1	12.83	20.70	38.30	
1990	3,380.0	795.9	4,175.9	293.1	3,882.8	15.52	27.40	33.58	
2000	3,889.0	1,609.4	5,498.4	410.4	5,088.0	18.02	30.70	30.70	
2001	3,770.1	1,815.6	5,585.7	398.2	5,187.5	18.18	30.00	29.30	
2002	3,958.8	1,896.2	5,855.0	332.1	5,522.9	19.16	31.60	30.40	
2003	3,514.7	2,070.7	5,585.4	314.1	5,271.3	18.11	36.70	34.74	
2004 f	3,800.0	1,965.0	5,765.0	360.0	5,405.0	18.40	--	--	

-- = Not available. f = ERS forecast. 1/ Source: National Agricultural Statistics Service, USDA. Production data were adjusted by ERS for 1970-80 to account for States not included in NASS estimates. 2/ Source is Bureau of the Census, USDC. 3/ Constant dollar prices calculated using GDP deflator, 2000=100.