

## U.S. Lettuce Production and Trade

**U.S. production of lettuce in 2002 is forecast at 4.6 million metric tons, unchanged from the previous year, according to the Economic Research Service (ERS). Head lettuce accounted for the bulk of production, followed by romaine and leaf lettuce. California and Arizona are the two major commercial producing U.S. states. For the 5<sup>th</sup> consecutive year, U.S. lettuce exports have been one of the bright spots for horticultural trade. In 2001, U.S. exports of lettuce were valued at \$195 million, up significantly from \$140 million registered in 1996. Traditionally, Canada accounts for about 80 percent of the total U.S. lettuce exports, followed by Mexico, Japan, Hong Kong, Taiwan and Singapore. Japan offers a unique market opportunity for U.S. lettuce exporters, despite their strict phytosanitary import requirements. U.S. exporters are hopeful that ongoing discussions between Ministry of Agriculture, Forestry and Fisheries (MAFF) and U.S. officials will lead to the establishment of a pilot export pre-clearance inspection program. Under such a program, MAFF plant health inspectors would be situated in the United States for pre-clearance of fresh lettuce to Japan, a development that could substantially boost U.S. sales to Japan. In 2001, U.S. lettuce imports were valued at only \$21 million, with Canada and Mexico accounting for most of the total value.**

### Production

The bulk of lettuce consumed in the United States is produced domestically. There are 3 basic types of lettuce produced: iceberg (also known crisphead or head lettuce), leaf, and romaine. The color for commercial cultivars varies from yellow-green to dark red and many colors in between. The vast majority of U.S. production takes place in just 2 states, California and Arizona. Other important, but smaller, commercial producing states include Colorado, New Jersey and New Mexico. Head lettuce is the leading type of lettuce produced in California, followed at a distance by romaine, which continues to flourish, both in popularity and acreage.

According to the Economic Research Service, lettuce production in the United States in 2002 is forecast at 4.6 million tons, unchanged from last year. Head lettuce accounted for 73 percent of total lettuce produced during 1999-2001, followed by romaine and leaf lettuce with 15 and 12 percent, respectively. Harvested acreage for romaine lettuce has continued to grow from 17,150 hectares in 1999 to 22,700 hectares in 2001, compared to the area for head lettuce which increased only marginally from 78,020 hectares to 78,350 hectares during this same period. Lettuce acreage for 2002, is expected to be slightly lower or about the same as 2001, due to a cold weather snap that occurred in Central California and Arizona in late January of this year.

## Consumption

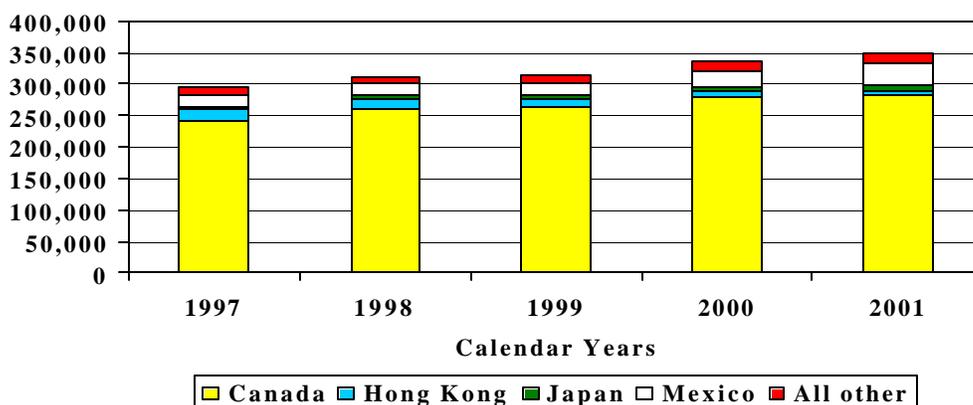
Consumption of lettuce in the United States continues to increase, with per capita use in 2001 reaching a record high of 32.7 pounds, up 2 percent from the year earlier. This increase was due mostly to a record high per capita use of leaf and romaine (8.8 pounds), up 4 percent from the previous year. The main reason for romaine's sustained growth is the continued popularity of Caesar salads plus the inclusion of romaine in a variety of fresh-cut salad products. The enduring popularity of vegetable salads and the convenience offered by fresh-cut salad products has boosted the demand for leaf lettuce. Also, some consumers now opt to replace iceberg lettuce with leaf and romaine lettuce in their home-made salads for added taste, texture, and variety.

## Trade

U.S. lettuce exports continue to be one of the bright spots for horticultural trade, with over 5 consecutive years of growth in volume. During the first 5 months of 2002, U.S. exports of lettuce were valued at \$112 million, up 23 percent in value from the previous year. Canada continued to be the United States best customer, with shipments to that destination accounting for 91 percent of the total export value. Strong economic growth in Canada and higher U.S. prices contributed to the rise in value of lettuce exports. During this same period, U.S. lettuce sales to Japan, the United States second largest market, were valued at \$2.5 million, down 50 percent from the previous year. In 2001, U.S. exports of lettuce to Japan were valued at \$9.2 million, up 53 percent from the previous year.

## U.S. Lettuce Exports to the World

Metric Tons



Japan represents a significant potential market for U.S. lettuce. Japan cannot produce U.S.-type iceberg lettuce because of a high-humidity climate. Fresh, crispy-type iceberg lettuce demand is growing, particularly at Japan's sandwich/hamburger outlets and family restaurants. Because of the growth in Japan's food industry, U.S. exporters are hopeful that ongoing discussions between USDA/APHIS and MAFF officials will result in the approval of a pilot export pre-clearance inspection program. Under this program, MAFF plant health officials would be situated in the United States for the purpose of inspection and pre-clearance of shipments bound for Japan. A pre-clearance program would lessen the risk of shipments running into problems upon arrival in Japan, and could facilitate a substantial increase in U.S. export sales.

### **United States: Lettuce Production and Area**

|                            | <b>Head</b> | <b>Leaf</b> | <b>Romaine</b> | <b>Total</b> |
|----------------------------|-------------|-------------|----------------|--------------|
| <b>Area Planted</b>        |             |             |                |              |
| <b>1999</b> Hectares       | 79,080      | 19,970      | 17,220         | 116,270      |
| <b>2000</b> Hectares       | 74,950      | 20,170      | 20,050         | 115,170      |
| <b>2001</b> Hectares       | 78,590      | 22,540      | 22,820         | 123,950      |
| <b>2002</b> Hectares       | NA          | NA          | NA             | NA           |
| <b>Harvested</b>           |             |             |                |              |
| <b>1999</b> Hectares       | 78,020      | 19,950      | 17,150         | 115,120      |
| <b>2000</b> Hectares       | 74,830      | 20,030      | 20,010         | 114,870      |
| <b>2001</b> Hectares       | 78,350      | 22,460      | 22,700         | 123,510      |
| <b>2002</b> Hectares       | NA          | NA          | NA             | NA           |
| <b>Production</b>          |             |             |                |              |
| <b>1999</b> Metric tons    | 3,189,690   | 502,400     | 595,750        | 4,287,840    |
| <b>2000</b> Metric tons    | 3,158,260   | 533,650     | 718,030        | 4,409,940    |
| <b>2001</b> Metric tons    | 3,289,070   | 532,240     | 739,030        | 4,560,340    |
| <b>2002</b> Metric tons 1/ | 3,265,869   | 582,419     | 733,000        | 4,581,288    |

Source: National Agricultural Statistical Service. 1/ Forecast by Economic Research Service.

NA = Not Available.

*(For information on production and trade, contact Emanuel McNeil at 202-720-2083. For information on marketing contact Elizabeth Mello at 202-7200-9903.)*