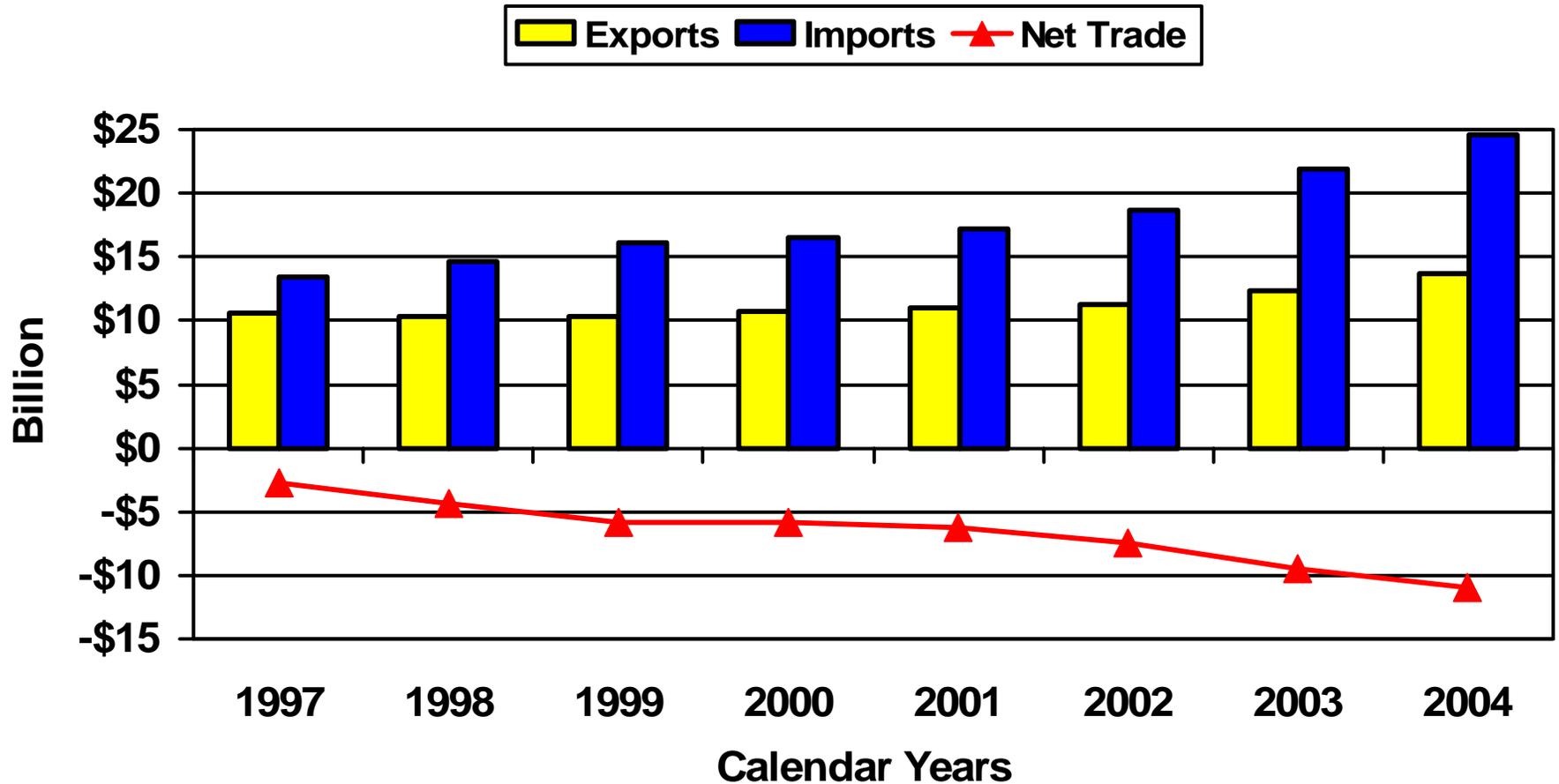


U.S. Horticultural Import Situation

**USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division**

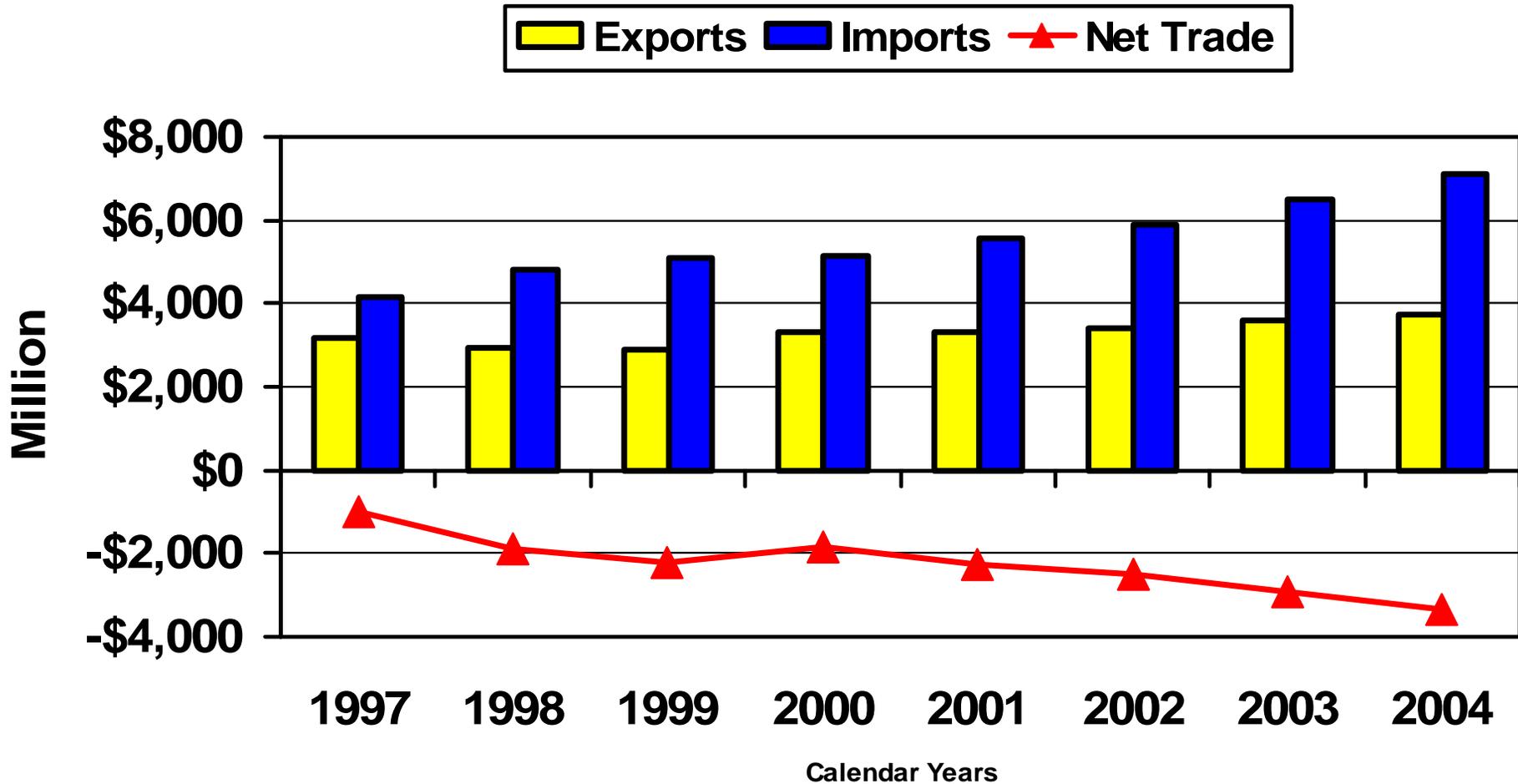
U.S. Overall Horticultural Trade



Source: Bureau of the Census, DOC

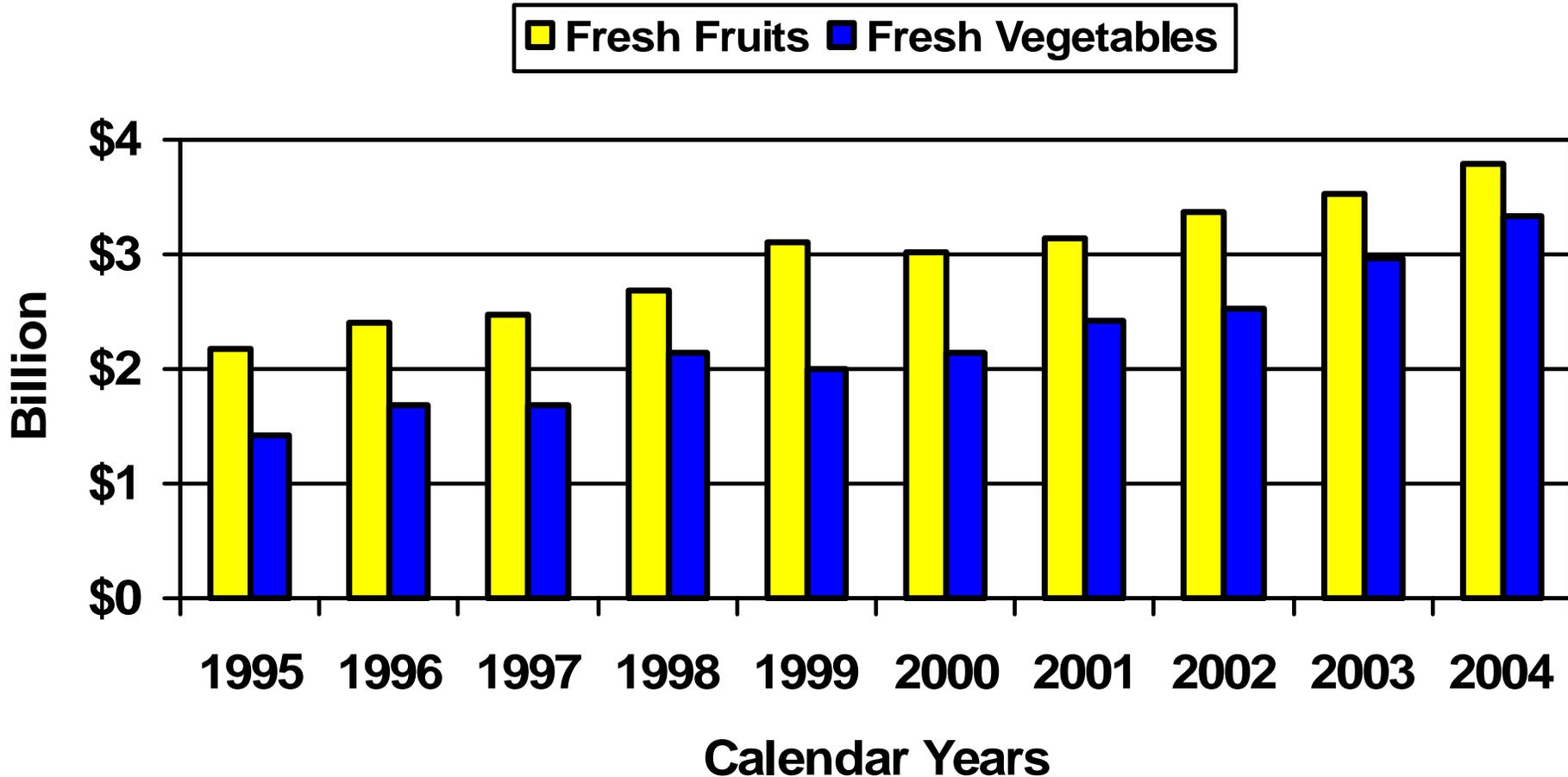
Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine and Beer.

U.S. Trade in Fresh Fruits and Vegetables



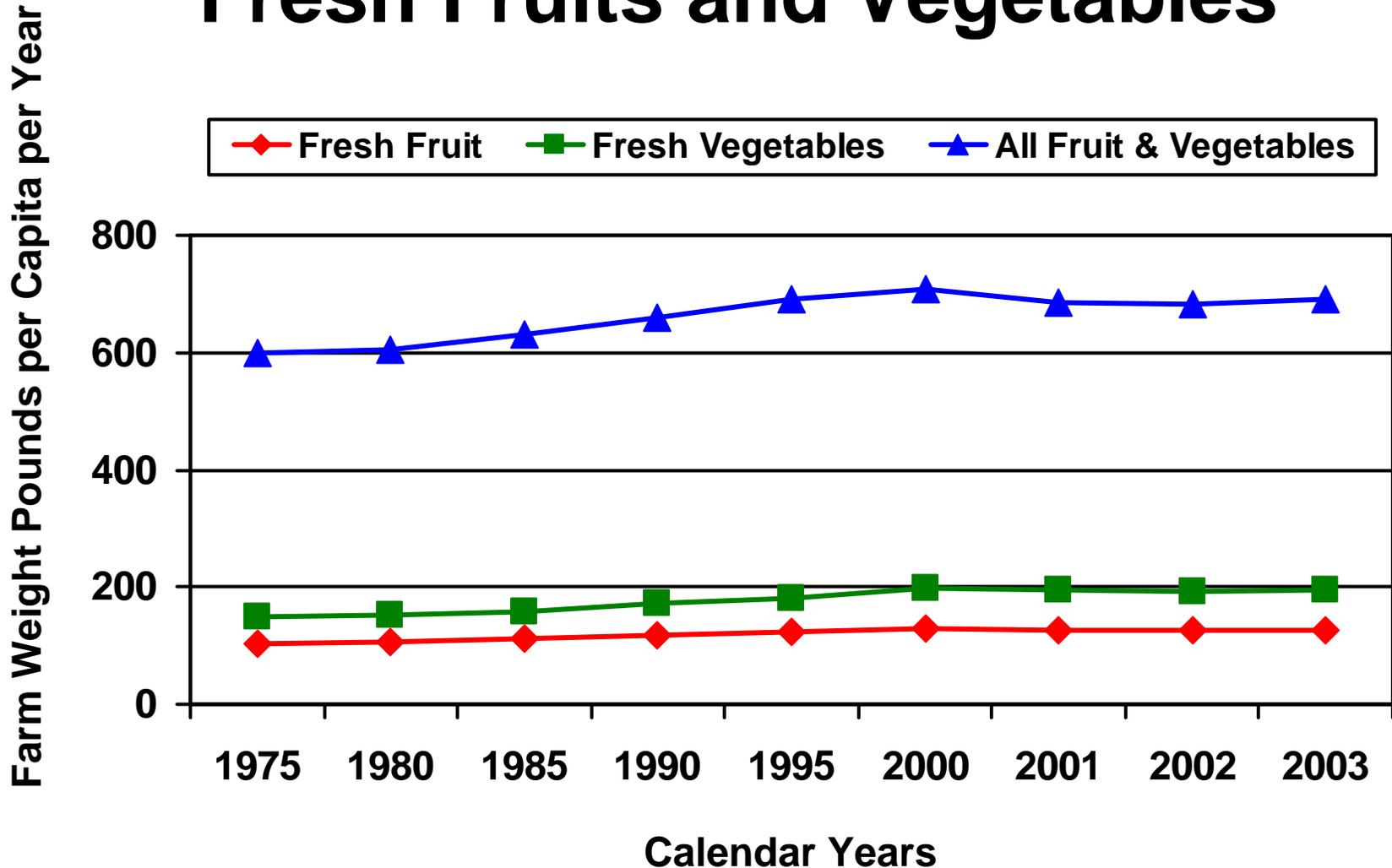
Source: Bureau of the Census, DOC

U.S. Imports of Fresh Fruits and Vegetables



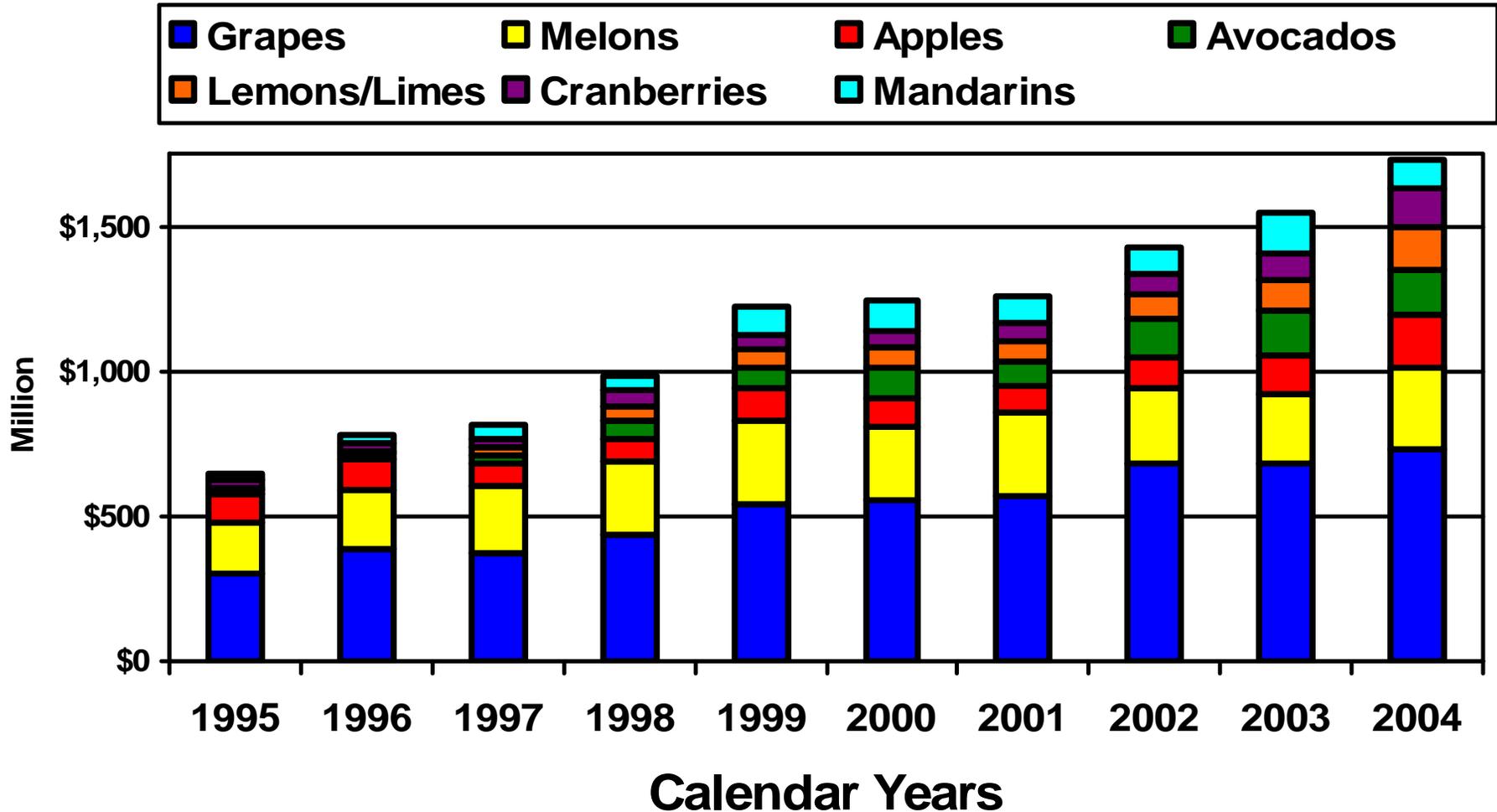
Source: Bureau of the Census, DOC

U.S. Per Capita Consumption of Fresh Fruits and Vegetables



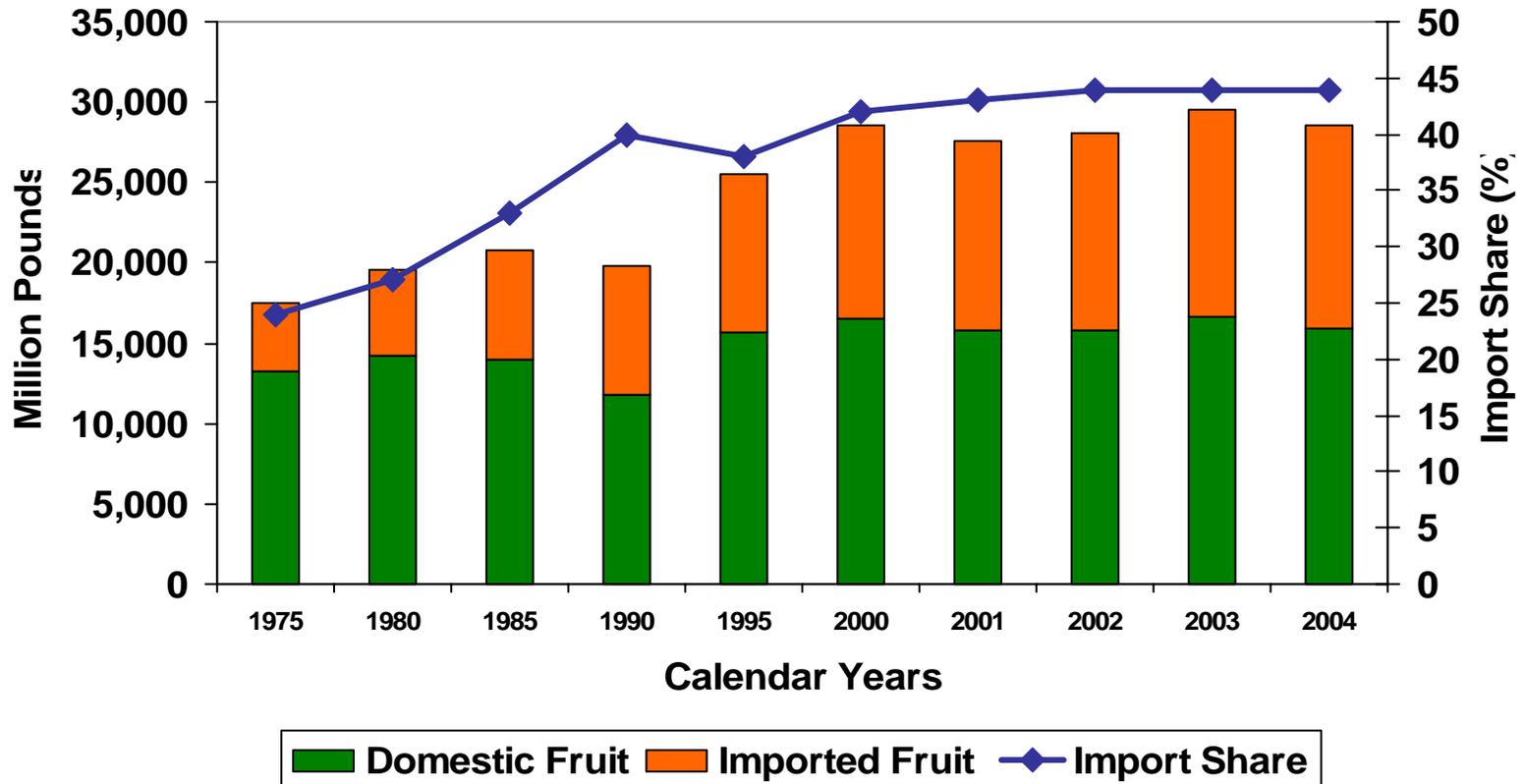
Source: Economic Research Service, USDA
All Fruits & Vegetables Includes Processed Products

U.S. Imports of Selected Fresh Fruits



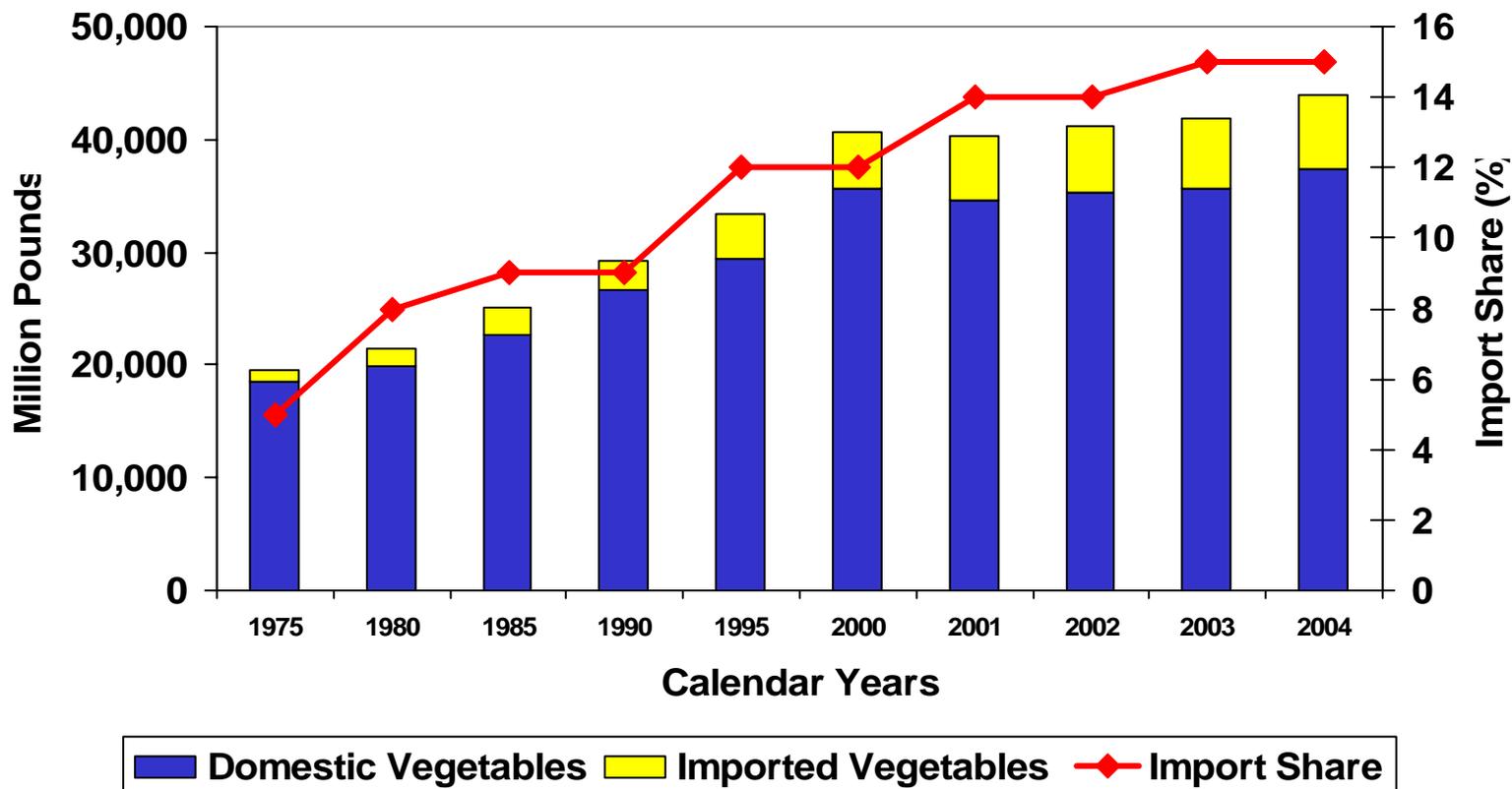
Source: Bureau of the Census, DOC

Import Share of U.S. Fresh Fruit Consumption



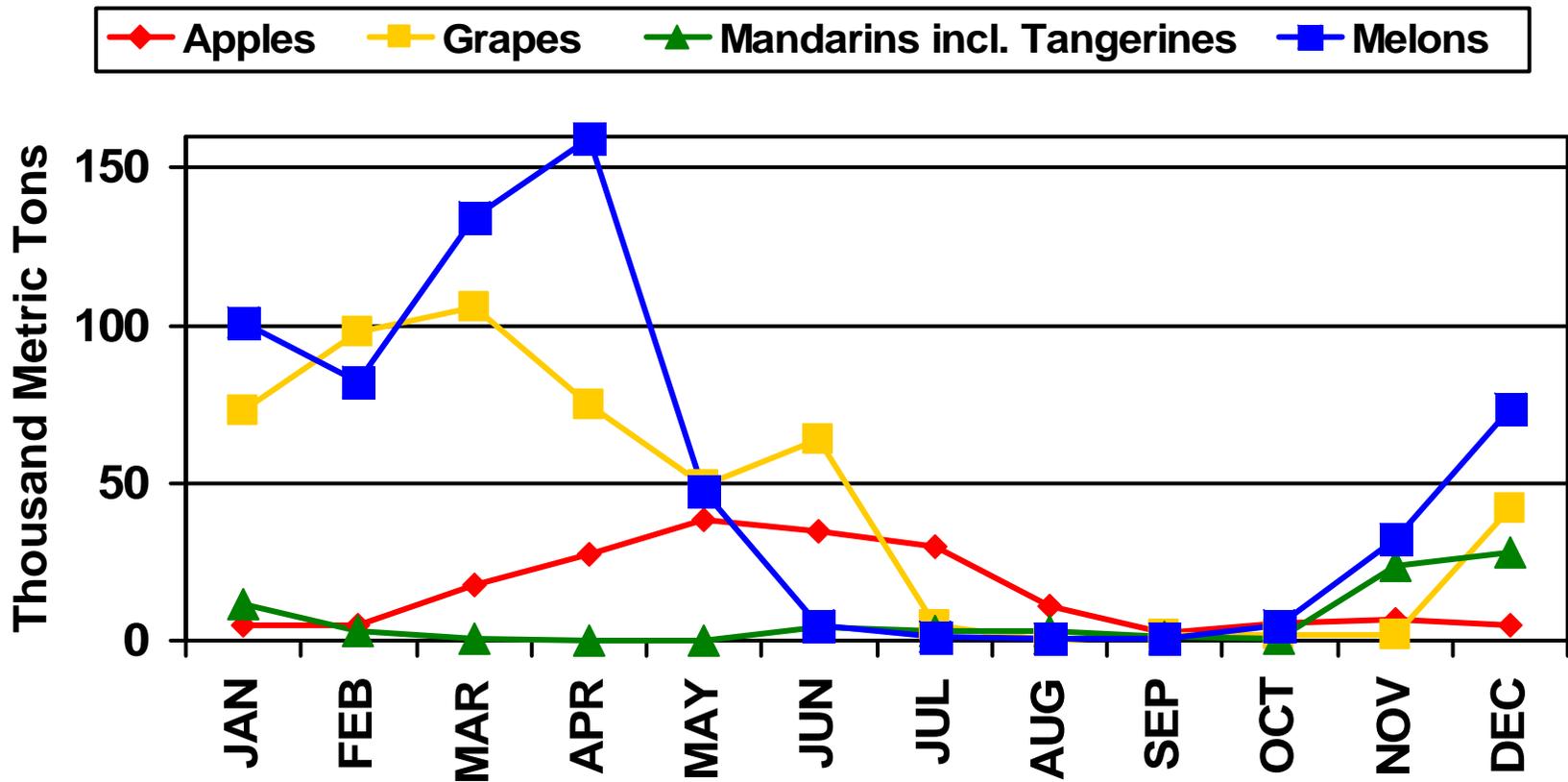
Source: Economic Research Service, USDA
Note- Excludes melons.

Import Share of U.S. Fresh Vegetable Consumption



Source: Economic Research Service, USDA
Note- Excludes potatoes and melons.

U.S. Monthly Imports of Selected Fresh Fruits

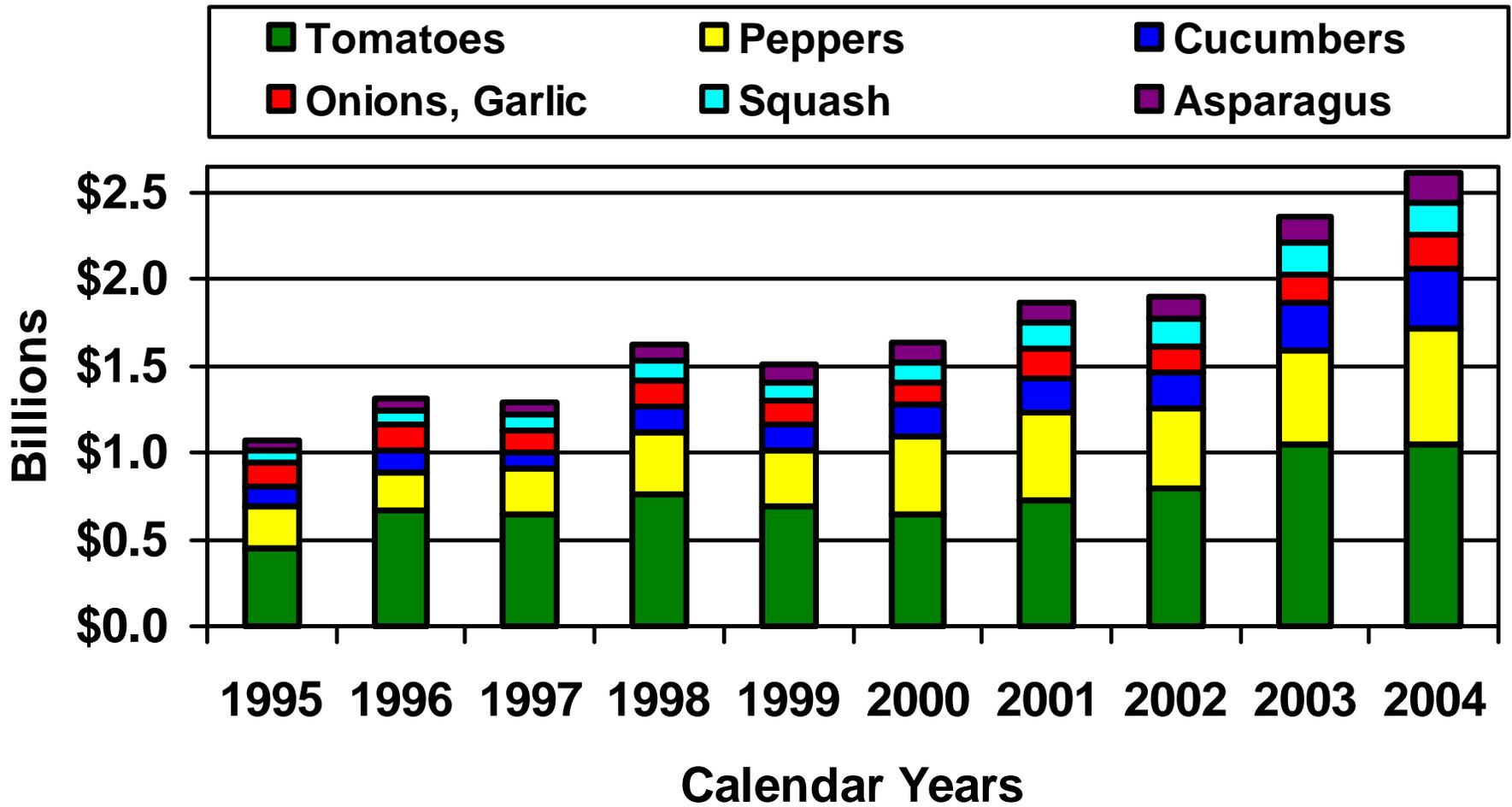


Source: Bureau of the Census, DOC
Note- Average monthly during 2002-2004.

Fruit Import Highlights

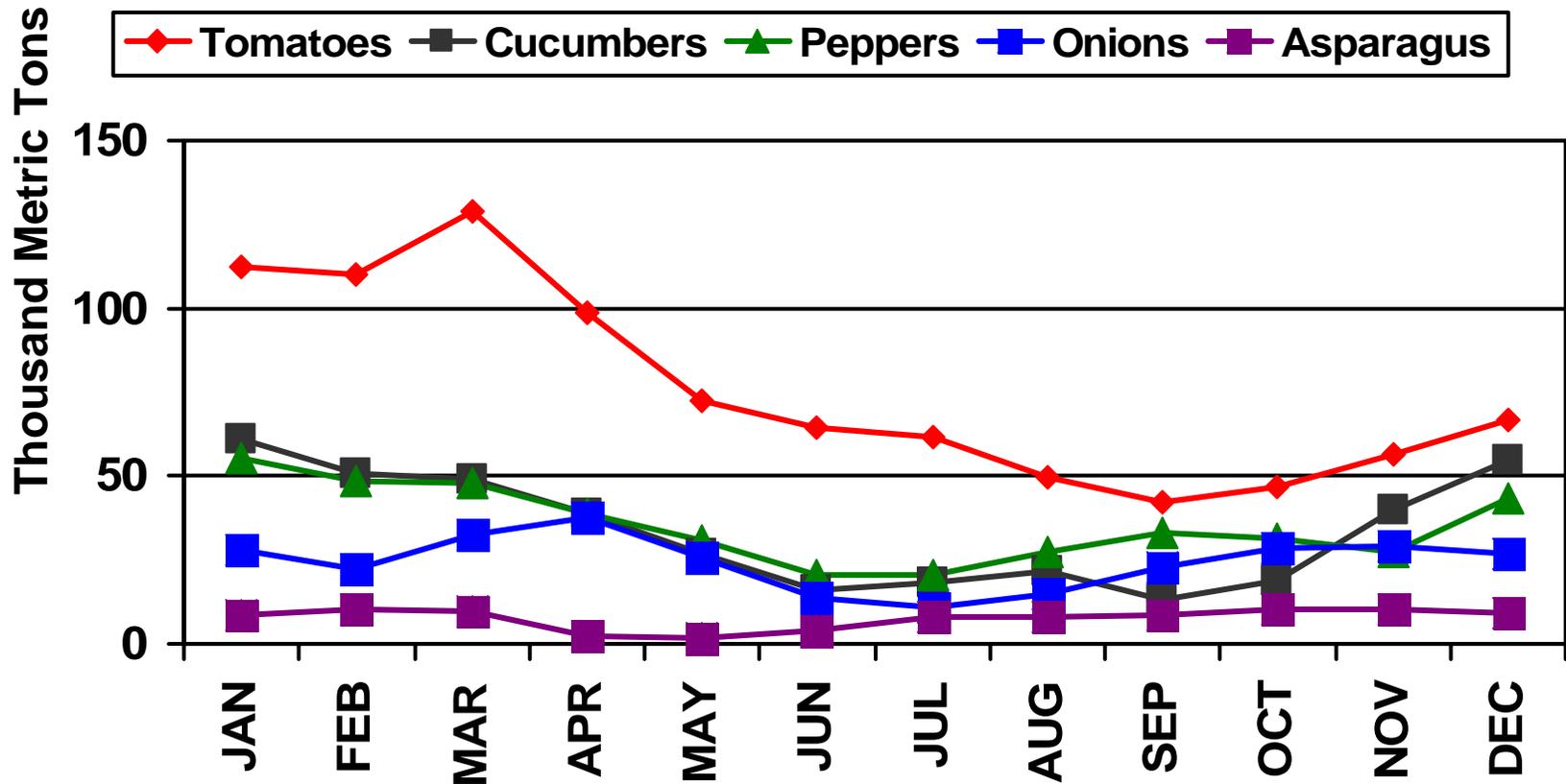
- **Fruit imports have grown considerably**, particularly grapes and melons. **Imports of these products follow a highly seasonal pattern**, peaking in the late fall through early spring and dropping to very low levels during June through October.
- **Latin America is the primary supplier of fresh and frozen fruit.**
- **Grapes: Imports rose 141 percent** during the 1995-2004 period. While most grape imports are during the U.S. off-season, there is substantial competition between imports and U.S. grapes during the U.S. marketing season. (Chile is the predominant supplier, followed by Mexico.)
- **Melons: Imports rose 62 percent** during the 1995-2004 period. Despite the seasonality of imports, there is substantial competition between imports and domestically produced melons during the U.S. marketing season. Growing consumption has outpaced growing production of melons. (Mexico is the predominant supplier, followed by Central American countries.)
- **Citrus: Imports of fresh mandarins, including clementines, and tangerines rose from \$18 million in 1994 to \$99 million in 2004**, peaking during the months of November-January in competition with U.S. citrus. Spain is the predominant supplier, followed by Morocco and South Africa.

U.S. Imports of Selected Fresh Vegetables



Source: Bureau of the Census, DOC

U.S. Monthly Imports of Selected Fresh Vegetables



Source: Bureau of the Census, DOC
Note- Average monthly during 2002-2004.

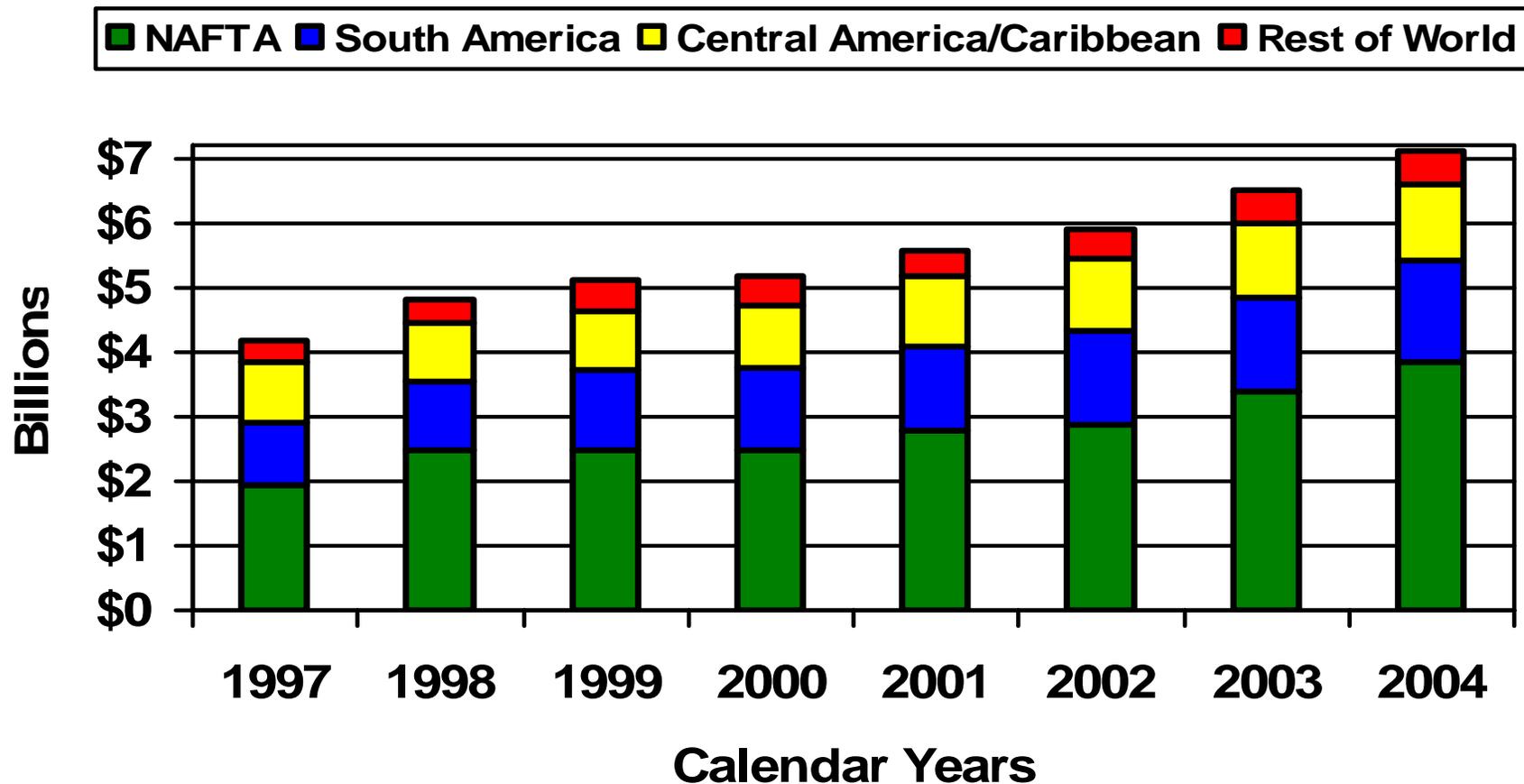
Fresh Vegetable Import Highlights

- **Imports of fresh vegetables have grown 133 percent in the past 10 years (1995-2004)**, particularly peppers (up 174 percent), cucumbers (up 201 percent), squash (up 151 percent), and asparagus (up 194 percent).
- **Vegetable imports are dominated by Mexico**, with an average 66-percent share; followed by Canada, with a 20-percent share; and Peru, with a 4-percent share.
- **Tomatoes: Imports rose from \$451 million in 1995 to over \$1 billion in 2004.** A high percentage of tomato imports compete head-to-head with U.S. product, leading to significant trade disputes. Mexico is by far the largest supplier, followed by Canada and the Netherlands.

Fresh Vegetable Import Highlights

- **Peppers:** Imports rose from \$242 million in 1995 to \$663 million in 2004, accounting for a growing share of domestic consumption. **Mexico is the predominant supplier**, followed by Canada and Peru. Imports from Canada and Peru have grown 378 percent and 539 percent, respectively, during the 1995-2004 period. Imports peak in the winter before the U.S. marketing season begins in July.
- **Squash:** Imports rose from \$65 million in 1995 to \$178 million 2003. *Mexico is the predominant supplier, accounting for 97 percent of imports in 2003.*
- **Asparagus:** Imports of fresh asparagus have grown from \$60 million in 1995 to \$176 million in 2004, as U.S. fresh consumption has grown from about 70,000 tons to close to 120,000 tons. While 95 percent of imports take place during the off-season, over the last 5 years, Peruvian asparagus is increasingly infringing on Washington's production season, especially in June, when Washington traditionally receives its highest prices for asparagus. Mexico and Peru are the predominant suppliers.

U.S. Fresh Fruit & Vegetable Imports from Western Hemisphere and Rest of World



Source: Bureau of the Census, DOC
Note: NAFTA includes Mexico and Canada.

U.S. Horticultural Imports Overview

- Over the period 1994-2003, **U.S. imports of horticultural products increased 121 percent** (from \$9.9 billion to \$21.9 billion). In contrast, U.S. exports of horticultural products over the same period expanded by 36 percent (rising from \$9.1 billion to \$12.3 billion).
- **Import penetration in the U.S. fruit and vegetable industry has increased significantly** in recent years. **Imports of fresh fruit rose** from 31 percent of fresh domestic consumption in 1990 **to 44 percent in 2002**. Excluding bananas and melons, imports of fresh fruit rose from 11.6 percent to 19 percent of fresh domestic consumption during the same period.
- Tropical fruit consumption has been rising significantly at the same time as domestic production has been falling. In this regard, Mexico supplies almost all of the mangos, papayas, and limes consumed in the United States. (Economic Research Service data)
- **Imports of fresh vegetables rose** from 7.5 percent of fresh domestic consumption in 1990 **to 13.5 percent in 2002**.
- Most imports of horticultural products (with some notable exceptions, such as EU wine and India cashews) are sourced from Western Hemisphere suppliers, most notably NAFTA partners Mexico and Canada.