










Specialty Crop Outlook

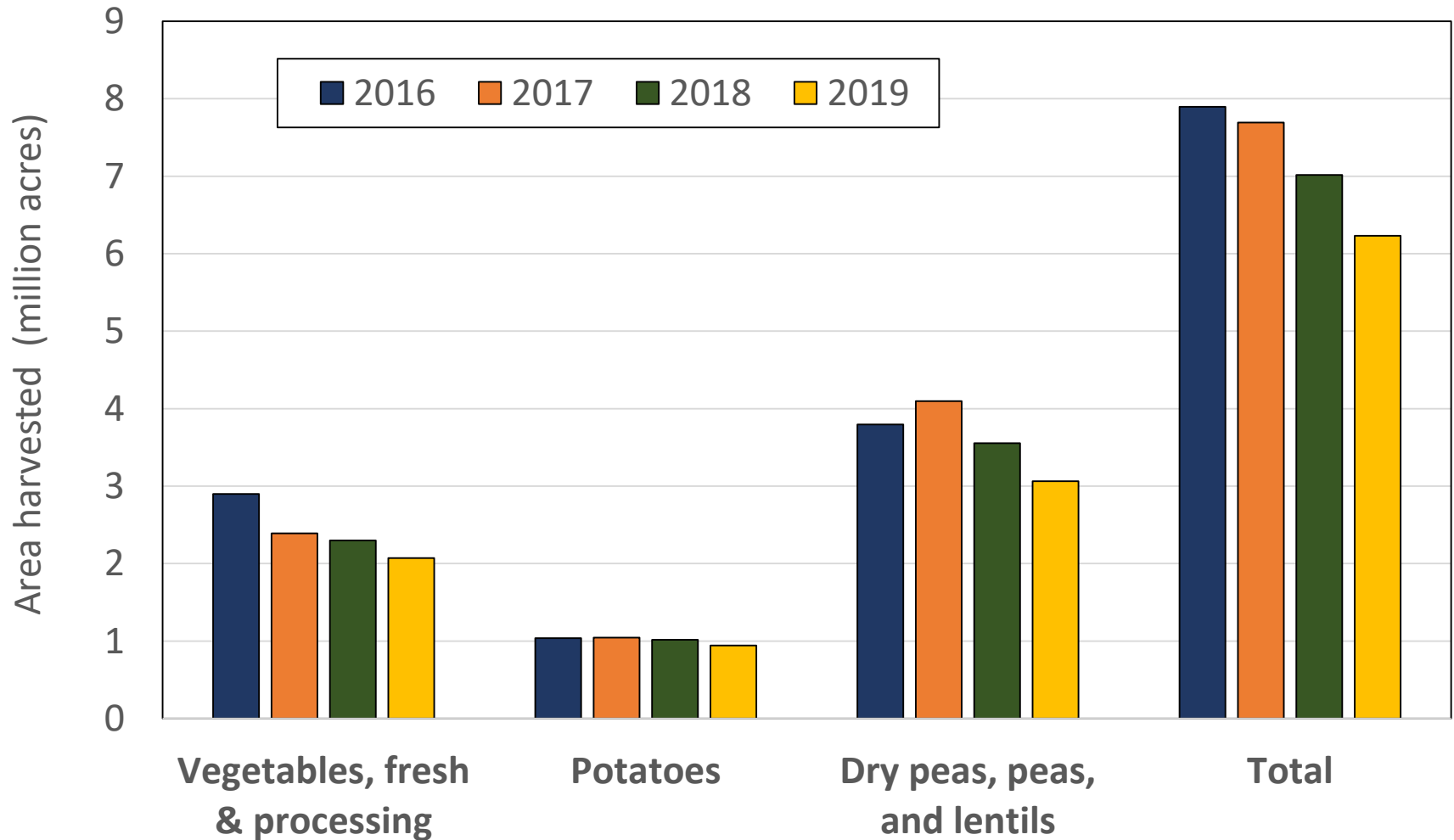
**Southern Outlook Meeting
September 22, 2020**

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Mississippi State University

U.S. vegetable and pulse industry overview

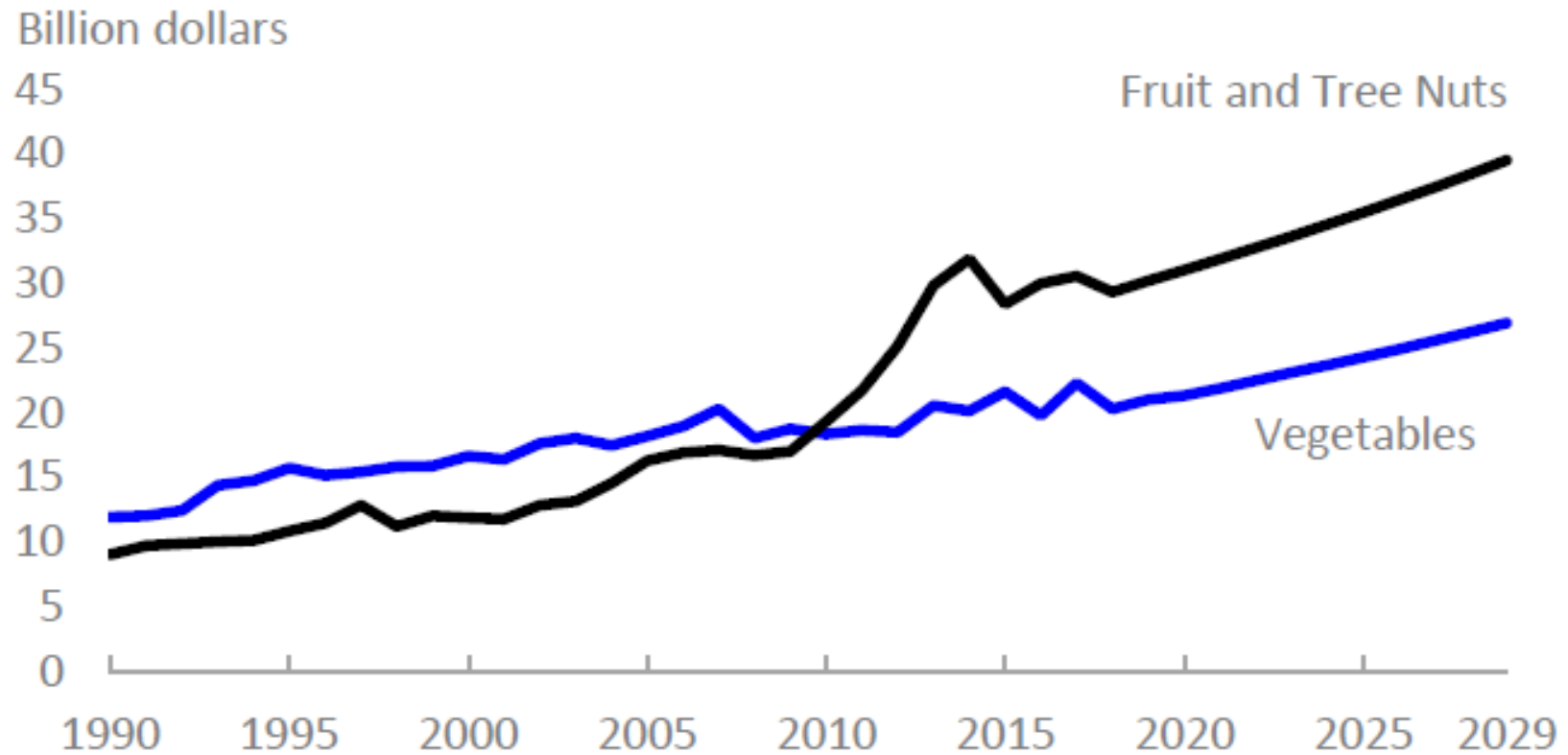
Item	2016	2017	2018	2019	% Change 2018-2019
Area harvested (1,000 acres)	7,896	7,694	7,017	6,230	-11 
Production (Million cwt)	1,332	1,223	1,220	1,173	-4 
Crop value (\$ millions)	20,152	20,928	18,938	19,407	2 
Unit value (\$/cwt)	15.13	17.11	15.52	16.55	7 
Imports (\$ millions)	12,947	13,158	13,941	14,200	2 
Exports (\$ millions)	6,846	7,147	6,713	6,980	4 
Per-capita availability (Pounds)	394.1	402.7	400.6	409.2	2 

Area harvested has declined



Value of specialty crops production expected to increase by 2.6% annually

U.S. fruit, nut, and vegetable: Value of production



Produce growers concerns

American Vegetable Grower, 2020 State of the Vegetable Industry Survey

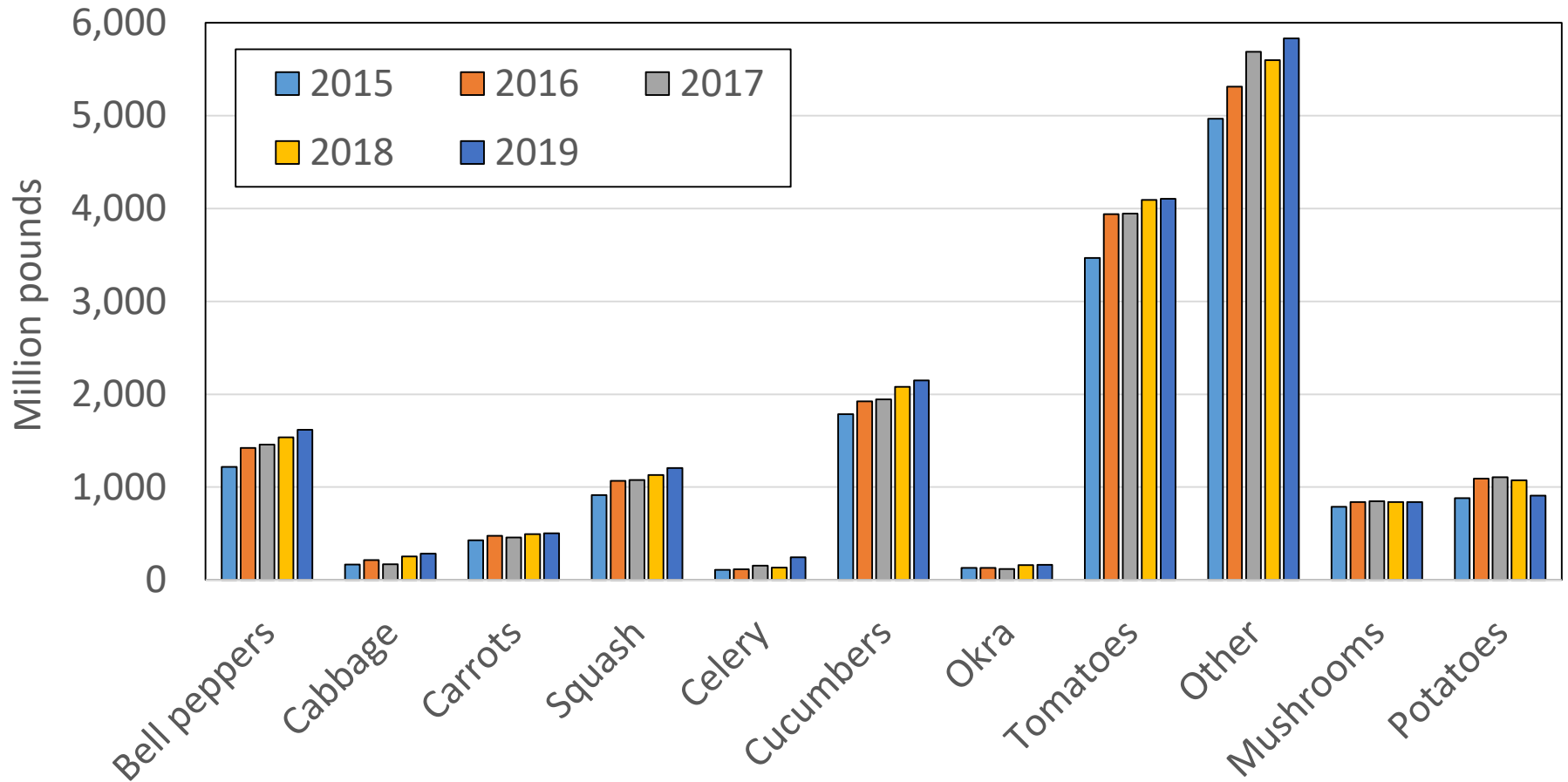
Here's what you told us were your **top six concerns** for 2020:

Labor	60%
Pests	45%
Extreme Weather	43%
Food Safety Rules	39%
Crop Prices	39%
Government Regulations	39%



Imports

Imports of vegetables



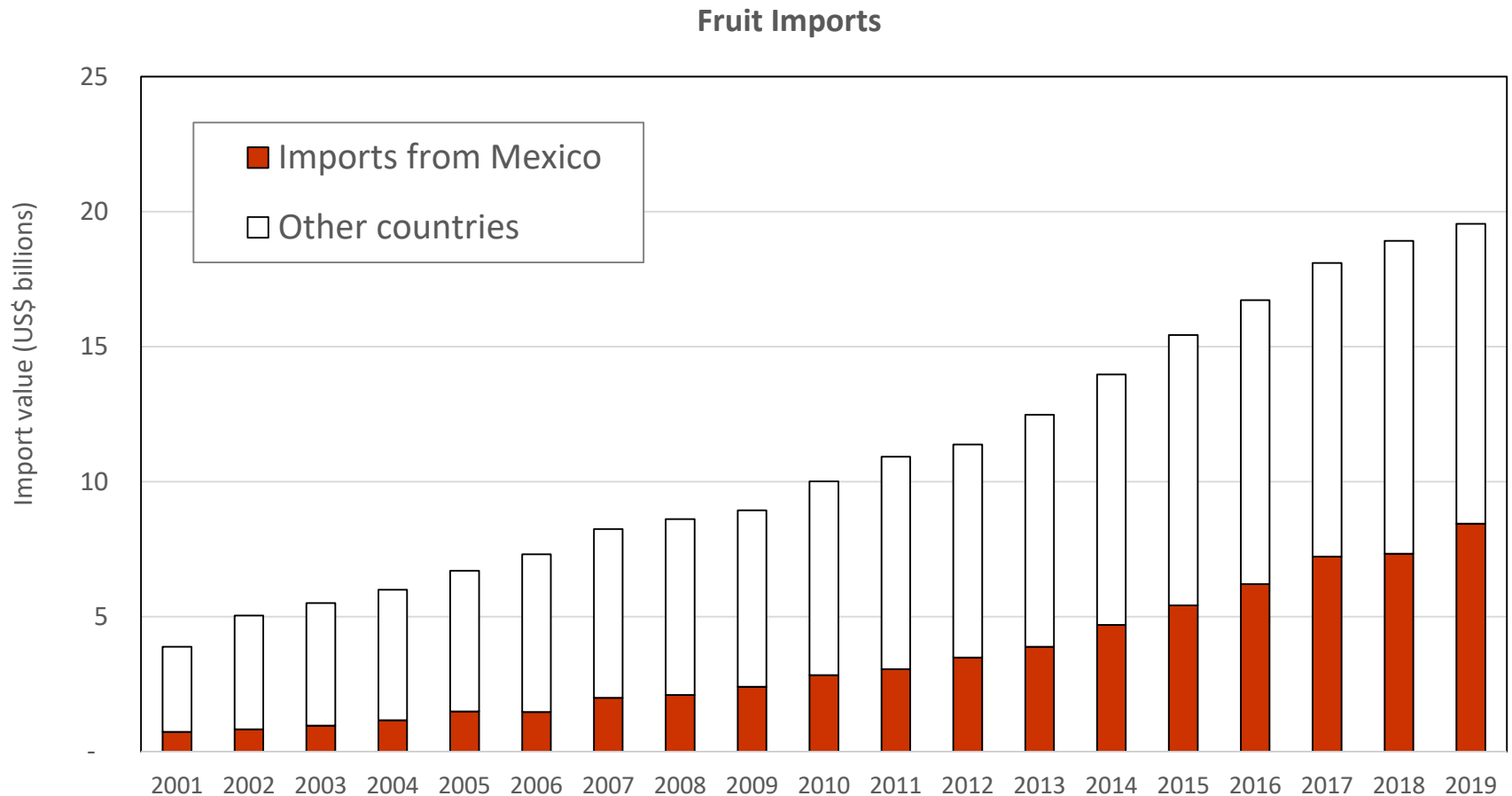
Value of vegetable imports have grown at an 8% annual rate¹ (2001-2019)



Source: Trade Map. UN COMTRADE. US Census Bureau statistics.

¹ Compound annual growth rate (GAGR).

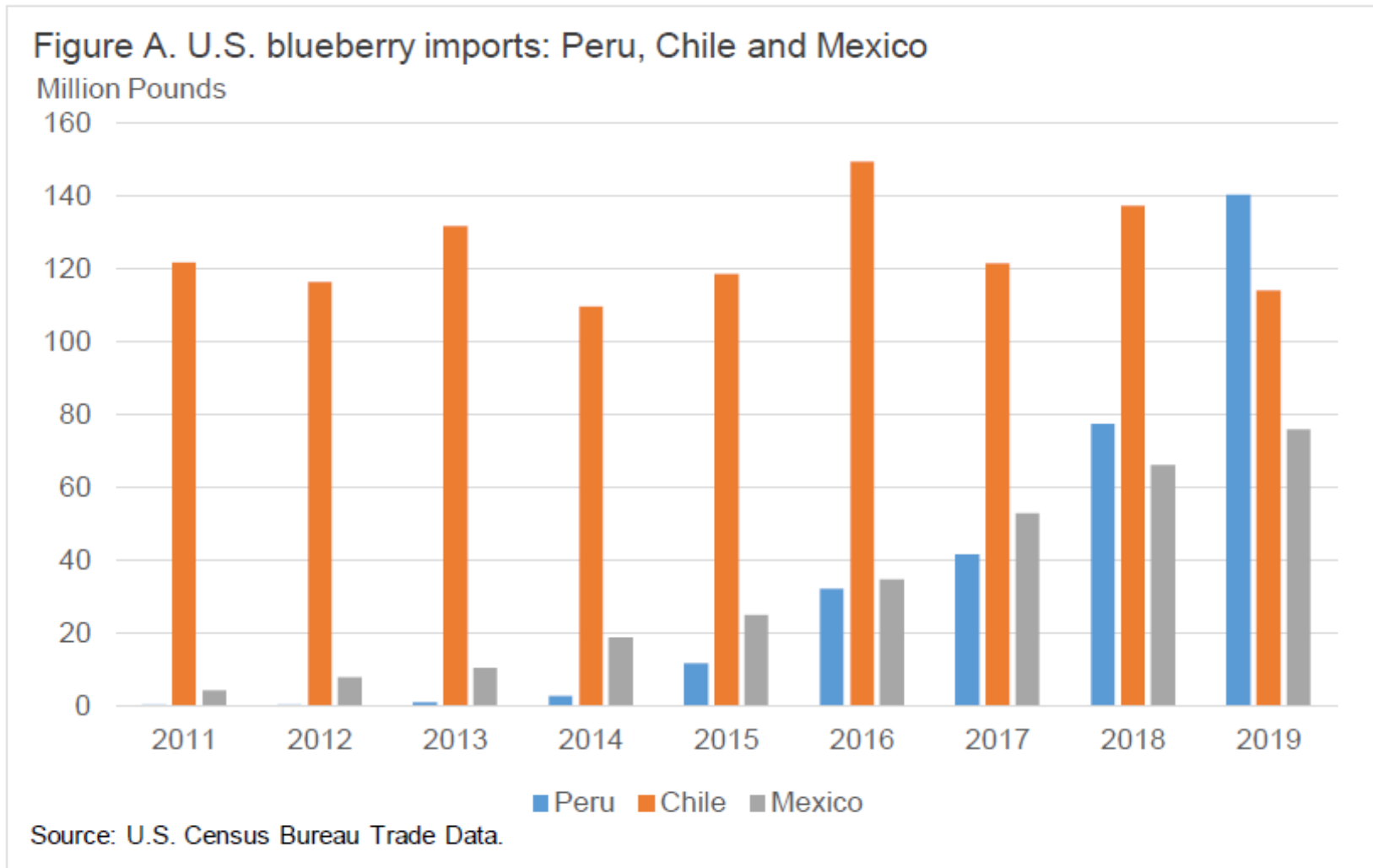
Value of fruit imports from grown at a 9% annual rate¹ (2001-2019)



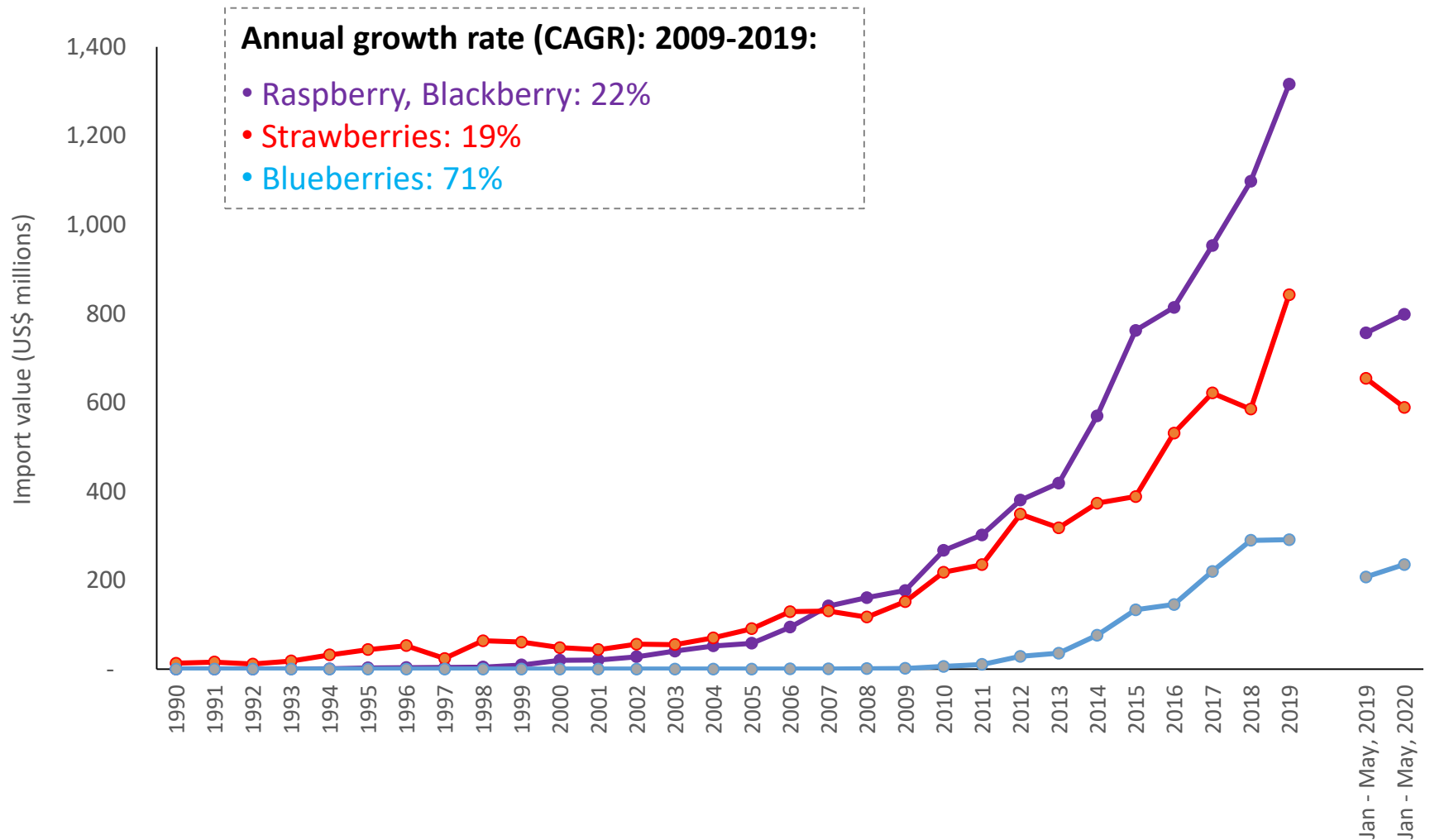
Source: Trade Map. UN COMTRADE. US Census Bureau statistics.

¹ Compound annual growth rate (GAGR).

Imports of blueberries continue to grow



Imports of different berries from Mexico continue to increase

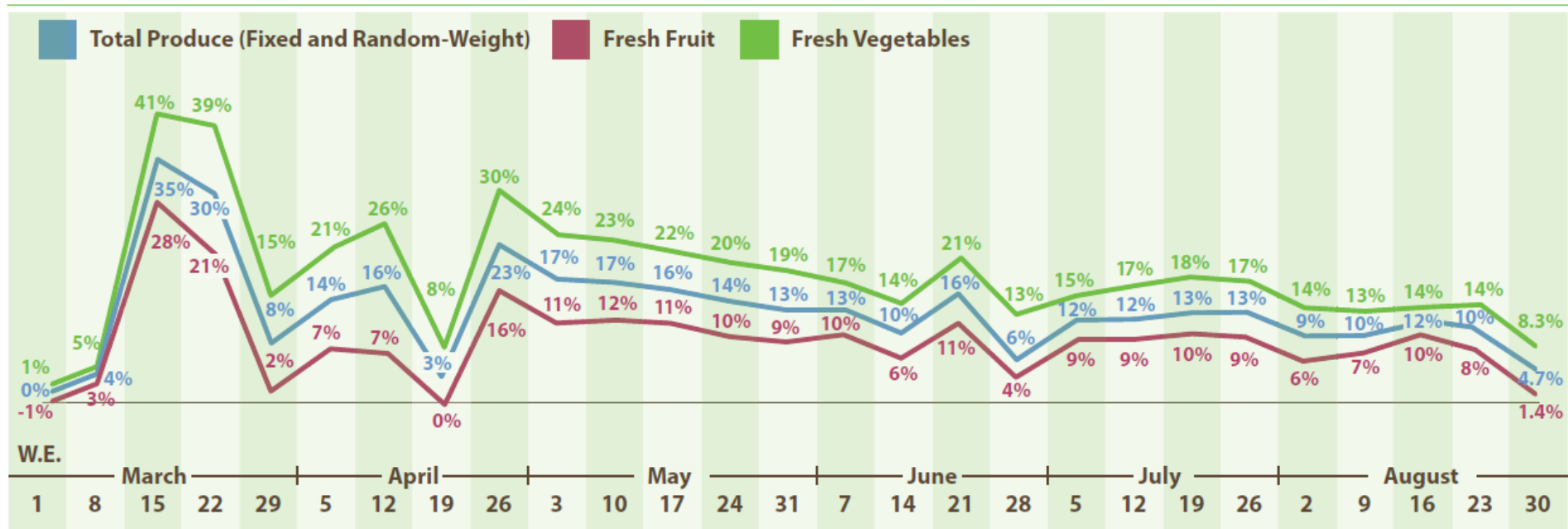




COVID-19

Retail sales of fresh fruit and vegetables

Weekly dollar growth over the comparable week in 2019

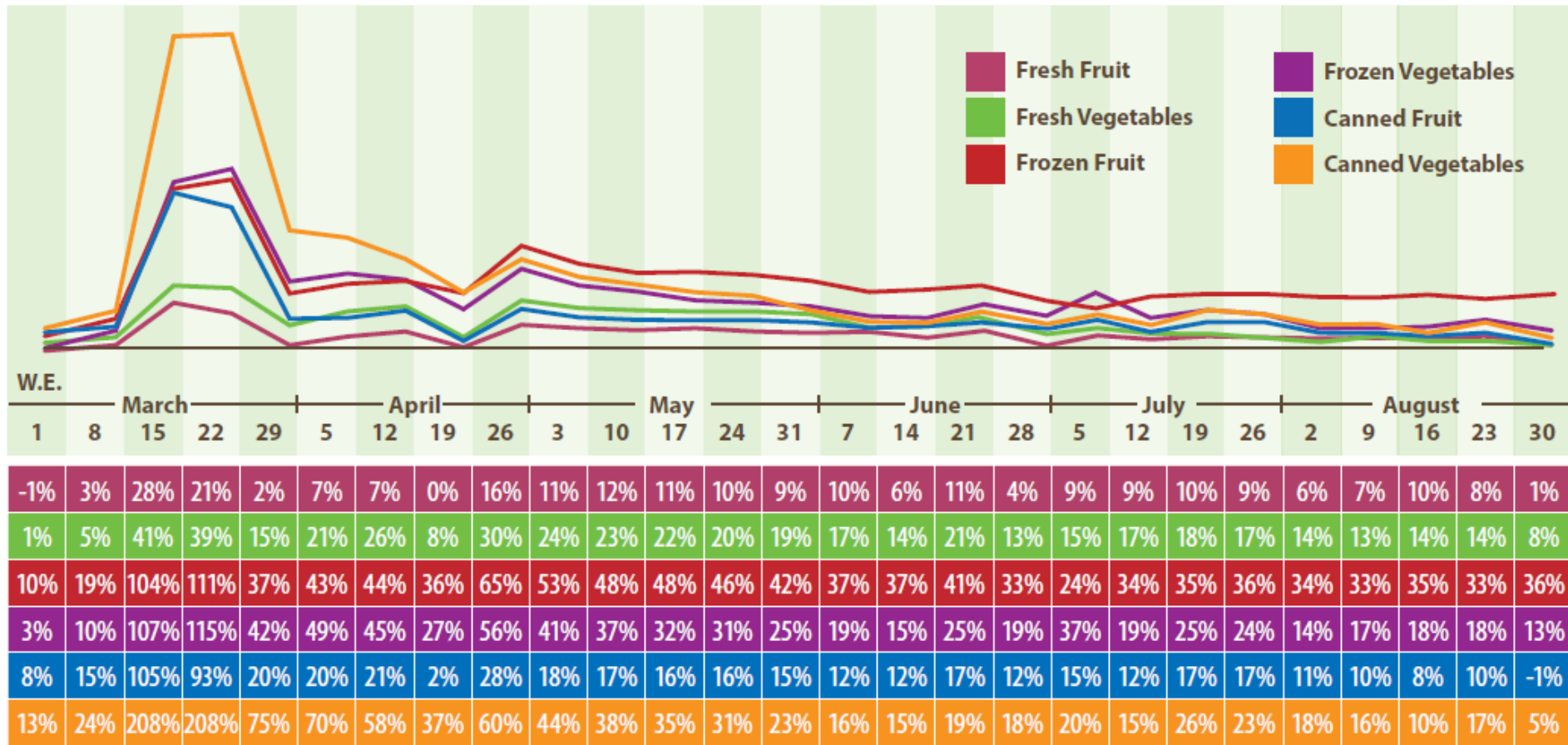


Source: IRI, Total U.S., MULO, 1 week % change vs. YA

Source: Produce Marketing Association. Produce Market Watch Weekly.

Changes in produce sales during COVID-19

Dollar sales growth versus the comparable week in 2019

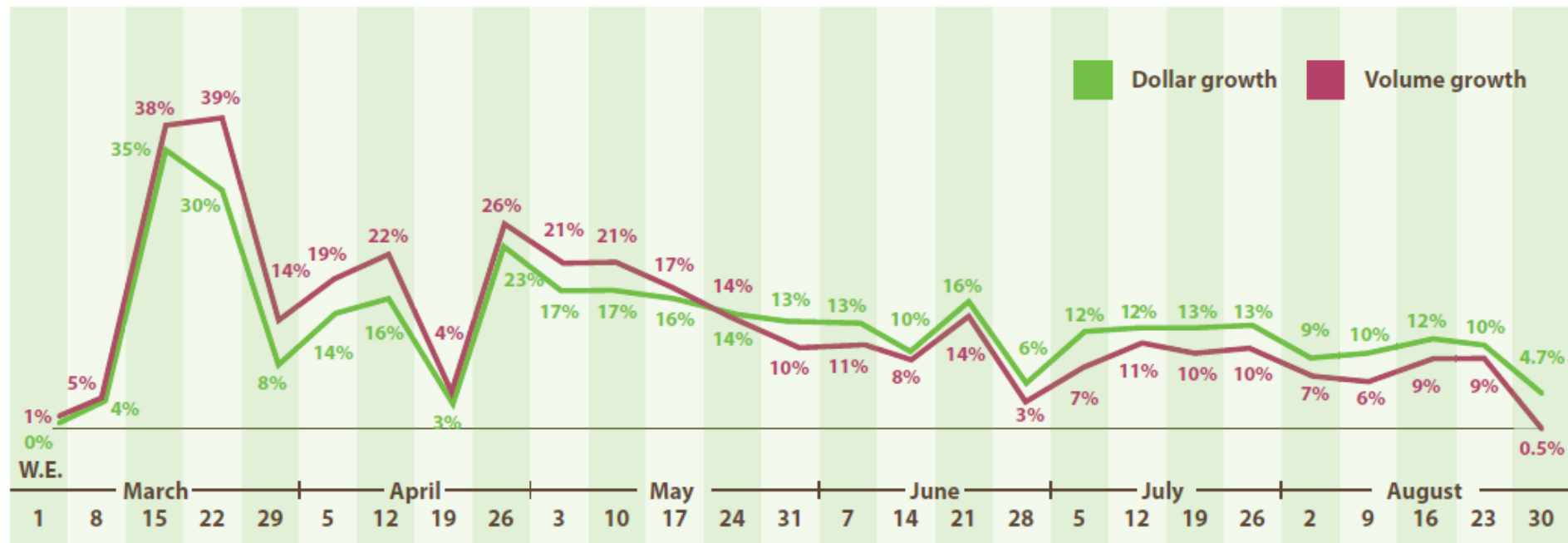


Source: IRI, Total U.S., MULO, 1 week % change vs. YA

Source: Produce Marketing Association. Produce Market Watch Weekly.

Changes in produce volume and sales during COVID-19

Weekly dollar and volume growth total produce (fixed and random weight) versus the comparable week in 2019



Source: IRI, Total U.S., MULO, 1 week % change vs. YA

Source: Produce Marketing Association. Produce Market Watch Weekly.

COVID-19 impact and uncertainties

- Impacts are not uniform
 - Retail vs. foodservice
- Additional costs
 - Worker safety
- Planting plans adjustments
- Industry creative solutions
 - Produce boxes, e-commerce



Thank you.