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Vegetables and Pulses Outlook: April 2026

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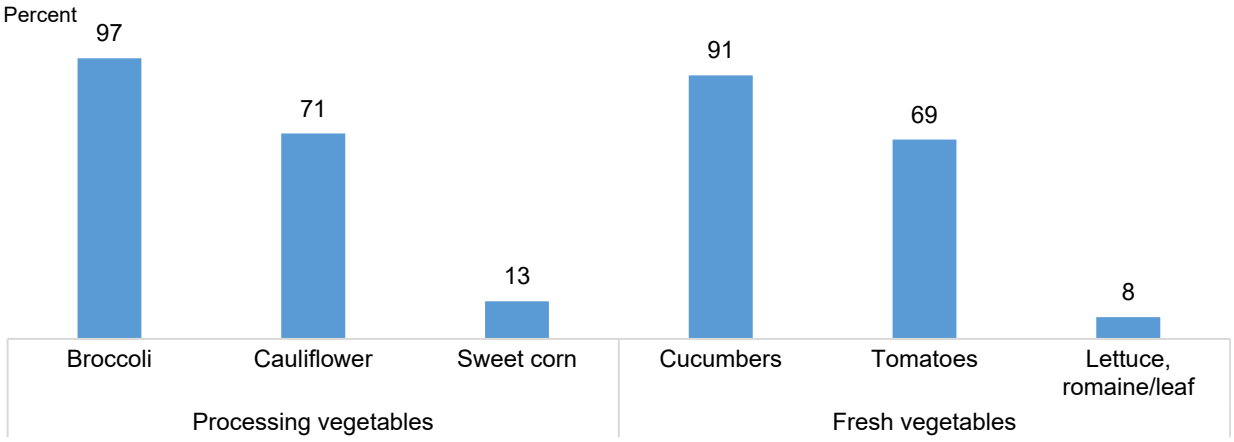
[Data tables are available in separate Excel file.]

U.S. Import Reliance: Heavy for Some, Light for Others

U.S. vegetable availability relies heavily on imports for some commodities, but reliance varies widely across fresh and processing markets. Imports accounted for about one-third of U.S. vegetable availability in 2025, according to USDA, ERS estimates. This includes both fresh and processing vegetables, which had similar import shares. Fresh vegetable imports (excluding potatoes) are concentrated among a few trading partners, with Mexico supplying about 77 percent and Canada about 13 percent of total imports. Among fresh vegetables, products such as tomatoes and cucumbers rely heavily on imports, while lettuce (including iceberg and romaine/leaf) is supplied primarily by domestic production. Among processing vegetables, broccoli and cauliflower show high import dependence, while sweet corn is supplied largely by domestic production.

U.S. import share of availability varies widely across selected fresh and processing vegetables, 2025



Source: Computed by USDA, Economic Research Service.

Industry Overview

Per capita availability reflects the quantity available for consumption in the United States per person. It is often used to assess relative changes in the available consumption of agricultural products over time and among commodities, while controlling for changes in the population size.

Fresh vegetables: The USDA, ERS preliminary per capita availability of fresh market vegetables (excluding potatoes) for 2025 is 148 pounds per person, up almost 3 pounds from the previous year (table 1). While higher year over year, this estimate is about 6 pounds fewer per person than the previous 3-year average (2021–23). A 6-percent increase in fresh market vegetable production, as shown in table a3, coupled with a 5-percent decrease in export volumes (table a4), offset lower import volumes in 2025 (down 3 percent).

Processing vegetables: The USDA, ERS estimated per capita availability of processing vegetables (excluding potatoes, sweet potatoes, and mushrooms) is 102.7 pounds per person in 2025, up 7 percent from 2024's low of 95.8 pounds per person but still below the previous 3-year average of 109.7 pounds (2021–23). Per capita availability for major processing vegetables, such as tomatoes, sweet corn, and snap beans, was higher year over year.

Potatoes: The USDA, ERS preliminary per capita availability of potatoes for calendar year 2025 is 112 pounds, a 2-percent reduction from 2024. The decline in availability reflects a smaller domestic potato crop and lower import volumes of frozen potato products and dehydrated potato products (fresh-weight basis). The preliminary 2025 import share of potato availability (all uses) is 22 percent, a 2-percent decline from 2024 but up from 14 percent a decade ago.

Pulses: The USDA, ERS preliminary per capita availability of dry pulse crops increased by 13.4 percent in calendar year 2025 to 12.6 pounds per person, following gains in the previous year. The largest year-over-year gains came from lentils, up 108 percent to almost 2 pounds per person; followed by dry peas, up 9 percent to almost 2.5 pounds per person; and dry beans, up 2 percent to 6.6 pounds. The increases in lentil, dry pea, and dry bean availability more than offset the 2025 decline in chickpeas, down 7 percent to 1.2 pounds per person.

Mushrooms: The 2024/25 per capita availability for all mushroom products (including truffles) is 3.5 pounds per person, a 5-percent increase from 2023/24. The increase reflects increases in production and processed imports (fresh-weight basis). The preliminary 2024/25 import share of availability for fresh mushrooms is 25 percent (mostly from Canada), a 1-percent decline from 2023/24 but more than double the share a decade ago.

Table 1: U.S. vegetable and pulse industry at a glance/1, 2022–25

Item	Unit	2022	2023	2024	2025	Percent change 2024–25
Area harvested						
Vegetables, fresh and processing/2/7	1,000 acres	2,240	2,140	2,026	2,082	2.8
Potatoes/8	1,000 acres	918	961	927	897	-3.3
Dry beans, dry peas, lentils, and chickpeas/3	1,000 acres	3,068	2,969	3,862	3,867	0.1
Mushrooms/4	1,000 acres	2.6	2.7	2.9	2.9	0.6
Total	**1,000 acres**	**6,228**	**6,073**	**6,818**	**6,849**	**0.5**
Production						
Vegetables fresh/2/7	Million cwt	324	319	308	324	5.3
Vegetables processing/2/5	Million cwt	338	379	332	356	7.3
Potatoes/8	Million cwt	402	440	421	413	-2.0
Dry beans, dry peas, lentils, and chickpeas/3	Million cwt	51	52	63	63	-0.5
Mushrooms	Million cwt	7.0	7.2	6.6	6.7	1.7
Total	**Million cwt**	**1,121**	**1,198**	**1,131**	**1,163**	**2.8**
Crop value						
Vegetables fresh/2/7	$ millions	15,621	14,791	15,122	15,424	2.0
Vegetables processing/2/5	$ millions	2,507	3,180	2,439	2,519	3.3
Potatoes/8	$ millions	5,166	5,393	4,948	4,619	-6.7
Dry beans, dry peas, lentils, and chickpeas/3	$ millions	1,603	1,651	1,878	1,461	-22.2
Mushrooms/4	$ millions	1,018	1,128	1,087	1,096	0.8
Total	**$ millions**	**25,916**	**26,144**	**25,475**	**25,118**	**-1.4**
Imports/6						
Vegetables fresh	$ millions	10,683	11,428	12,498	10,445	-16.4
Vegetables processing/5	$ millions	4,394	4,442	4,891	4,960	1.4
Potatoes (including seed)	$ millions	2,534	3,096	3,315	3,036	-8.4
Dry beans, dry peas, lentils, and chickpeas/3	$ millions	404	415	386	335	-13.2
Mushrooms	$ millions	664	629	653	628	-4.0
Total	**$ millions**	**18,679**	**20,010**	**21,744**	**19,404**	**-10.8**
Exports/6						
Vegetables fresh	$ millions	2,487	2,388	2,603	2,315	-11.1
Vegetables processing/5	$ millions	1,617	1,627	1,827	1,668	-8.7
Potatoes (including seed)	$ millions	2,082	2,291	2,328	2,217	-4.8
Dry beans, dry peas, lentils, and chickpeas/3	$ millions	664	978	1,120	777	-30.7
Mushrooms	$ millions	41	32	26	23	-14.0
Total	**$ millions**	**6,891**	**7,316**	**7,905**	**7,000**	**-11.4**
Per capita availability						
Vegetables fresh	Pounds	156.3	151.0	145.3	148.1	2.0
Vegetables processing/5	Pounds	113.8	103.8	95.8	102.7	7.2
Potatoes/8	Pounds	112.6	116.2	114.7	111.9	-2.4
Dry beans, dry peas, lentils, and chickpeas/3	Pounds	12.0	10.5	11.1	12.6	13.4
Mushrooms/9	Pounds	3.6	3.5	3.3	3.5	5.1
Total	**Pounds**	**398.3**	**385.0**	**370.1**	**378.7**	**2.3**

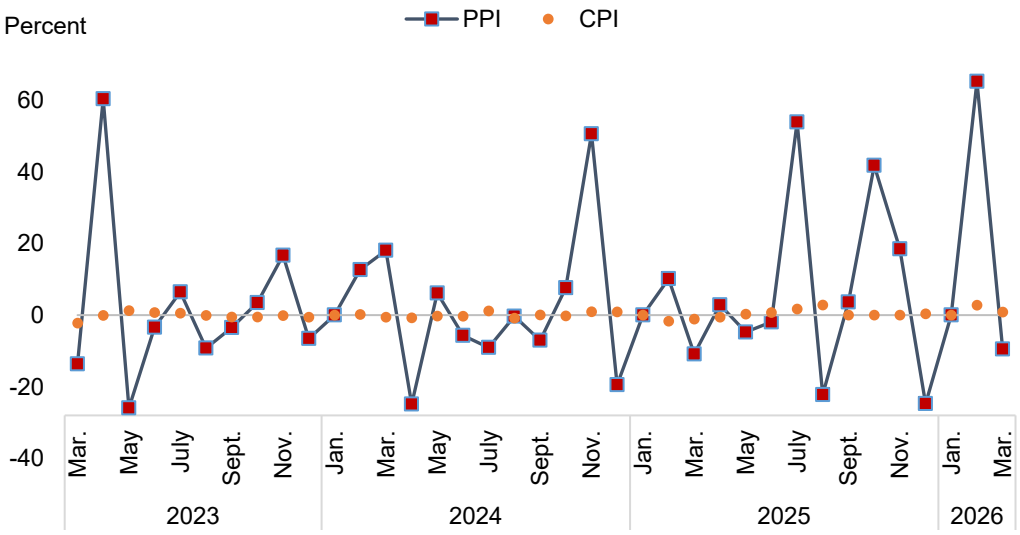
Hundredweight (cwt) = 100 pounds. $ millions = million U.S. dollars.
1/ Total values rounded.
2/ Utilized production excluding melons.
3/ Includes Austrian winter and wrinkle seed peas where applicable.
4/ Mushroom area equals Agaricus total fillings (multiple mushroom crops).
5/ Includes canned, frozen, and dried. Excludes potatoes, pulses, and mushrooms.
6/ All international trade data are expressed on a calendar year basis.
7/ Includes both fresh and processed sweet potatoes.
8/ Includes both fresh and processed.
9/ The mushroom crop year (July–June) ends with the year listed (e.g., 2025 = 2024/25).
Source: USDA, Economic Research Service calculations based on data from USDA, National Agricultural Statistics Service data and U.S. trade data from U.S. Department of Commerce, Bureau of the Census.

Fresh Market Vegetables

Fresh Vegetable Prices Reflected Differing Dynamics Across Producer and Retail Markets

Price measures for fresh vegetables increased in early 2026 at both the producer and consumer levels, though the magnitude and timing of changes differed. Supply shifts across key growing regions—including Florida, California, Arizona, and Mexico—can introduce short-term variability, and these movements occurred at various points throughout the year, particularly the winter production transition period. Weather-related disruptions, including freezing conditions in Florida and periods of heavy rainfall and heat in other producing regions, contributed to short-term supply variability and price volatility. Ongoing water constraints in California continued to shape production conditions but were less tied to short-term price movements. The observed price movements are consistent with typical seasonal supply patterns and winter production transitions, as shifting harvest locations can temporarily affect supply availability across markets. Because these indices are not seasonally adjusted, they include normal seasonal fluctuations, meaning some of the observed volatility reflects typical patterns rather than uncommon market conditions. Producer prices, as measured by the Producer Price Index (PPI), rose more sharply; while retail prices, as measured by the Consumer Price Index (CPI), increased more gradually (figure 1).

Figure 1
Month-to-month percentage changes in producer (PPI) and retail (CPI) prices for fresh vegetables show greater volatility at the producer level



PPI = Producer Price Index. CPI = Consumer Price Index.
Source: USDA, Economic Research Service based on data from Bureau of Labor Statistics.

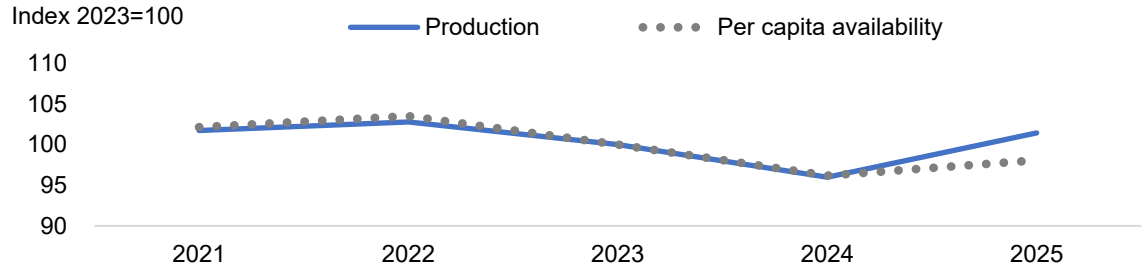
At the producer level, the PPI for fresh vegetables (excluding potatoes) rose 88 percent year over year in February 2026 and remained about 90 percent above March 2025 in March 2026, even after easing from the February level. On a month-to-month basis in early 2026, producer prices declined 9.5 percent from February to March, reflecting a partial reversal following sharp increases earlier in the winter.

At the retail level, the CPI for fresh vegetables (including potatoes) is less volatile compared to PPI and tends to lag movements in the PPI. The fresh vegetable CPI was 5 percent higher in February 2026 and 8 percent higher in March 2026 compared to the same months a year ago. The component structure of the CPI also influences overall changes. Potatoes and tomatoes each represent about 13 percent of the index, while lettuce accounts for roughly 9 percent. The remaining commodities are grouped into an "other fresh vegetables" category representing about two-thirds of the total weight. As a result, movement in the broader category tends to drive overall CPI trends, while price changes in individual commodities can influence the index but are not the primary drivers of aggregate movements. On a month-to-month basis in early 2026, retail prices increased 3 percent from January to February and 1 percent from February to March, with higher prices for tomatoes, lettuce, and other vegetables alongside lower potato prices.

Production Patterns Drive Changes in Availability

Preliminary USDA, ERS data indicates that the domestic availability of selected fresh vegetables[1], excluding potatoes, increased about 2 percent in 2025 from the previous year, rising from 145 to 148 pounds per person, following declines in 2023 and 2024 (table 1). Production and per capita availability declined from 2022 to 2024 before partially recovering in 2025, generally moving together over the period (figure 2).

Figure 2
Indexed U.S. fresh vegetable production and per capita availability, 2021–25 (2023 = 100)



Source: USDA, Economic Research Service calculations.

[1] Selected fresh-market vegetables, excluding potatoes, include commodities covered by USDA, NASS annual surveys as well as additional crops estimated by USDA, ERS. See table a2 in the accompanying Excel data tables for a detailed list.

Onions, tomatoes, and lettuce are among the largest fresh vegetables in terms of production and per capita availability and are discussed in detail below. Other fresh vegetables showed mixed changes in 2025. Several commodities posted notable increases in per capita terms, including sweet potatoes, which rose by nearly 1 pound per person, along with gains in leafy greens, carrots, cucumbers, and bell peppers, reflecting gains in production driven by improved yields and harvested acreage. In contrast, availability declined for asparagus, cauliflower, spinach, and broccoli, which showed the largest decrease, down 16 percent from the previous year. Other commodities, including cabbage, celery, squash, and sweet corn, were little changed from 2024 levels (table a2).

Overall, production of selected fresh-market vegetables increased in 2025, marking a partial recovery from declines observed in 2023 and 2024 (table a3). While gains in several crops supported higher availability, production and availability patterns remained uneven across commodities, reflecting differences in crop-specific conditions and timing.

Mexico Remains the Primary Supplier as Import Reliance Varies Across Fresh Vegetables

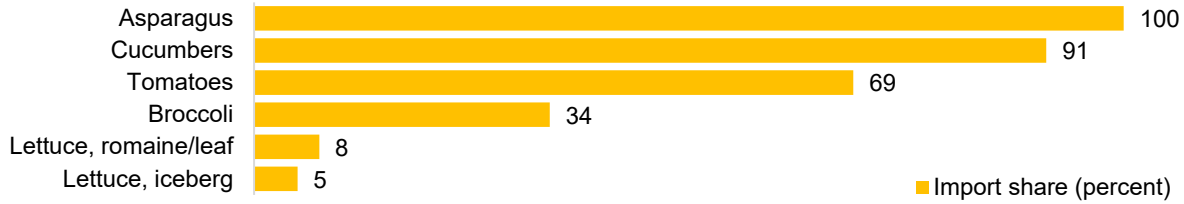
The United States relies heavily on a small number of trading partners for nearly all fresh vegetable imports. On average, Mexico supplied 77 percent of these imports over 2023–25, while Canada accounted for an additional 13 percent. On the export side, trade flows were similarly concentrated but reversed, with Canada as the primary destination, accounting for 71 percent of exports, while Mexico accounted for 14 percent. This concentration reflects the integrated nature of North American fresh vegetable supply chains, particularly for perishable products requiring short transit times.

U.S. fresh vegetable trade volumes declined in 2025, with imports decreasing 3 percent and exports falling 5 percent from 2024 levels. Total import volume reached 18.6 billion pounds in 2025, while exports totaled 3.8 billion pounds. Early 2026 data suggest continued moderation, as imports for January–February were down 6.7 percent year over year, and exports declined 2.4 percent over the same period (table a4).

Imports accounted for 35 percent of U.S. fresh vegetable availability in 2025, according to USDA, ERS estimates. Import shares for these commodities have remained relatively stable across 2023–25 but vary widely across commodities, ranging from single-digit levels for crops such as iceberg lettuce and romaine/leaf lettuce to much higher levels for others (figure 3). At the higher end, import shares exceeded 50 percent for tomatoes and exceeded 80 percent for

cucumbers. For asparagus, import reliance was effectively at or above total domestic availability (about 100 percent), indicating high dependence on imports despite ongoing domestic production.

Figure 3
U.S. import share of availability varies widely for selected fresh vegetables, 2025



Source: USDA, Economic Research Service.

Fresh-Market Overview: Tomatoes, Onions, and Lettuce

Tomato availability. USDA, ERS estimates that fresh domestic availability of tomatoes equaled 6.49 billion pounds in 2025, a 1-percent decline from the 2024 peak of 6.56 billion pounds. These estimates include both field-grown production and ERS estimates of greenhouse production. The 2024 *Census of Horticultural Specialties* (CHS) indicates that greenhouse[2] production is heavily concentrated in tomatoes, highlighting their prominent role among reported greenhouse food crops, with other crops contributing a smaller share of total production. Comparing the 2019 and 2024 CHS, greenhouse tomato production declined, while the value of sales increased, suggesting changes in the value or composition of production despite lower reported volumes (table a5). Within overall supply, lower imports more than offset a modest increase in U.S. tomato production, as imports account for the majority of total availability. Domestic tomato production rose about 7 percent from 2024 to 2.18 billion pounds, while tomato imports declined about 5 percent to 4.47 billion pounds. Fresh tomato export volumes continued to decline longer, falling to about 158 million pounds in 2025, down 13 percent from the previous year.

Tomato trade, import shares, and reliance. USDA, ERS estimates that imports accounted for 68.9 percent of domestic availability of fresh tomatoes in 2025, down from 71.7 percent in 2024. The import share for 2025 is slightly below the 3-year average for 2021–2023 (69.1 percent) but remains above the 2015–24 average of about 65 percent. Mexico remains the leading foreign supplier of fresh tomatoes, accounting for 90 percent of U.S. tomato imports during 2023–25. Canada typically supplied about 10 percent over the same period. Import reliance is higher for greenhouse tomatoes than for field-grown tomatoes, consistent with year-round import

[2] Greenhouse corresponds to “protected culture” or “grown under protection” as referenced in *Census of Horticultural Specialties* terminology.

availability, primarily from Mexico. These shifts were driven by declines in field-grown tomato imports, while greenhouse imports increased modestly. In early 2026, total U.S. tomato import volumes declined 16 percent year to date through February 2026, while exports declined about 11 percent over the same period (table a4).

Tomato Suspension Agreement. The United States withdrew from the 2019 Tomato Suspension Agreement on July 14, 2025, resuming the application of anti-dumping duties on fresh tomato imports from Mexico. These duties were expected to place upward pressure on domestic tomato prices. From August 2025 through February 2026, imports from Mexico were down approximately 15 percent compared with the same period a year earlier, with the largest declines occurring from November through February. These declines were primarily concentrated in field-grown tomato shipments, while greenhouse tomato imports increased modestly over the same period. Concurrently, adverse weather conditions in key production regions in Mexico, particularly in Sinaloa during the winter production season, may have constrained exportable supplies. Together, these factors are consistent with observed changes in import volumes, though the extent to which policy versus production conditions contributed to these shifts remains uncertain.

Tomato movement. Early 2026 shipment data from USDA, Agricultural Marketing Service indicate lower tomato movement (shipment volumes), with total volumes (including domestic and imported shipments) declining about 17 percent year over year from January through the third week of April 2026. Domestic shipments fell more sharply over the same period, declining by about 28 percent. Shipments from Mexico were also lower, down about 14 percent year over year. Seasonal production patterns generally followed typical trends, with winter tomato movement largely concentrated in Florida, where shipments remain a primary contributor to total movement through May, before transitioning to western production regions later in the year. However, periods of below-freezing temperatures in Florida during late January and early February 2026 likely disrupted tomato harvest and shipment patterns. Florida shipments through the third week of April were well below comparable periods in 2024 and 2025, indicating continued weakness beyond the initial winter disruption.

Tomato prices. With lower movement, declining imports, and policy-driven changes in trade flows, domestic tomato prices showed mixed movements across producer and retail market levels. USDA, NASS tomato grower prices declined sharply in 2025 compared with 2024 (down 40–45 percent) but increased in early 2026, with January and February tomato prices up substantially year over year (up 95 percent and 147 percent). AMS shipping-point tomato prices

also increased for some varieties, particularly plum-type tomatoes, rising by more than 100 percent year over year in first-quarter 2026 (table a6). In contrast, retail advertised prices for vine-ripe tomatoes remained below year-earlier levels, suggesting uneven transmission of price pressures across the tomato supply chain. This pattern is consistent with tighter supplies of field-grown tomatoes, particularly roma tomatoes, alongside relatively more stable availability of greenhouse tomatoes.

Onion production and availability higher in 2025: USDA, ERS estimates bulb onion production was 7.14 billion pounds in 2025, an increase of 11 percent from 6.46 billion pounds in 2024 and the highest since 2016. Higher U.S. production helped to increase total domestic supply 7 percent year over year in 2025. Fresh bulb onion per capita availability increased 1.4 pounds year over year to 22.4 pounds per person in 2025, about 5 percent above the previous 3-year average of 21.3 pounds (2021–2023). Onions accounted for 15 percent of the 148.1 pounds of fresh vegetables (excluding potatoes) available per person in 2025, below total lettuces (iceberg and romaine/leaf combined) and above tomatoes. Imports accounted for 19 percent of fresh bulb onion availability in 2025, lower year over year and below the previous 3-year average of 22 percent (2021–2023).

Onion imports and exports lower in 2025: Imports of fresh onions, shallots, and onion sets totaled 1.33 billion pounds in 2025, down 5 percent from 1.40 billion pounds in 2024 and 7 percent below the previous 3-year average (2021–23). Three countries accounted for almost all fresh onion imports to the United States on average in recent years (2023–25): Mexico (64 percent), Peru (22 percent), and Canada (11 percent). Onion imports from Mexico decreased 5 percent year over year to 832.3 million pounds, while imports from Peru increased 5 percent to 320 million pounds. Most onion imports from Peru are sweet yellow onions and enter counter seasonal to Georgia's sweet onion season, which runs from mid-April through September.

Exports of fresh onions, shallots, and onion sets totaled 757.7 million pounds in 2025, down 5 percent from 799.4 million pounds in 2024 but 14 percent above the previous 3-year average (2021–23). Shallots accounted for 65 percent of fresh onion export volume, and almost all shallot exports are destined for either Canada (94 percent) or Mexico (5 percent). Shallot exports decreased 5 percent year over year on lower volumes to the top two destinations.

Onion shipments and prices in early 2026: U.S. grown onions are available year-round, with more mild and sweet flavored onions available from March to August and more pungent storage onions ("dry bulb") available from August to May. Year-to-date dry onion domestic shipment volume through mid-April 2026 (week 1 through week 15) was about 4 percent higher than the same period in 2025. Lower shipments from Washington and Idaho were offset by higher

volumes out of Oregon, Texas, and Utah. Sweet yellow onion shipments from Georgia began in mid-April, with initial volumes lower year over year as the season begins.

In the first quarter of 2026 (January–March), national retail prices for conventional onions averaged lower for red and white onions and higher for yellow onions compared to the first quarter of 2025. In January and February 2026, national average retail prices were lower for red, white, and yellow onions year over year. By March 2026, average retail prices had increased to $1.35 per pound for red onions (up 11 percent); $0.99 for white onions (up 7 percent), and $0.96 per pound for yellow onions (up 8 percent) compared to March 2025.

Lettuce availability: The USDA, ERS estimate for fresh domestic lettuce availability in 2025 was 10.11 billion pounds, a 4-percent increase from 2024. A year-over-year increase in production and lower export volume more than offset an 8-percent decline in imports during 2025. U.S. lettuce production accounted for 93 percent of domestic availability in 2025 with import's share of availability dropping from 8 percent to 7 percent year-over-year. The ERS annual estimate for fresh lettuce availability includes two categories: head lettuce and romaine/leaf lettuce. In 2025, the romaine/leaf lettuce category represented a record high share of total fresh lettuce availability (62 percent), up from the 1999–2001 average of 25 percent. This record share reflects a longer trend of decreasing production of head lettuce like iceberg and increasing production of romaine/leaf lettuce.

Lettuce production and price. The USDA, NASS lettuce production data includes three categories: head, romaine, and leaf. In 2025, romaine accounted for the largest share of lettuce production at 4.7 billion pounds, followed by head lettuce at 3.8 billion pounds and leaf lettuce at 1.6 billion pounds. Increased average prices across all three NASS-reported categories, combined with higher production, rose total lettuce production value from $4.8 billion in 2024 to $5.84 billion in 2025.

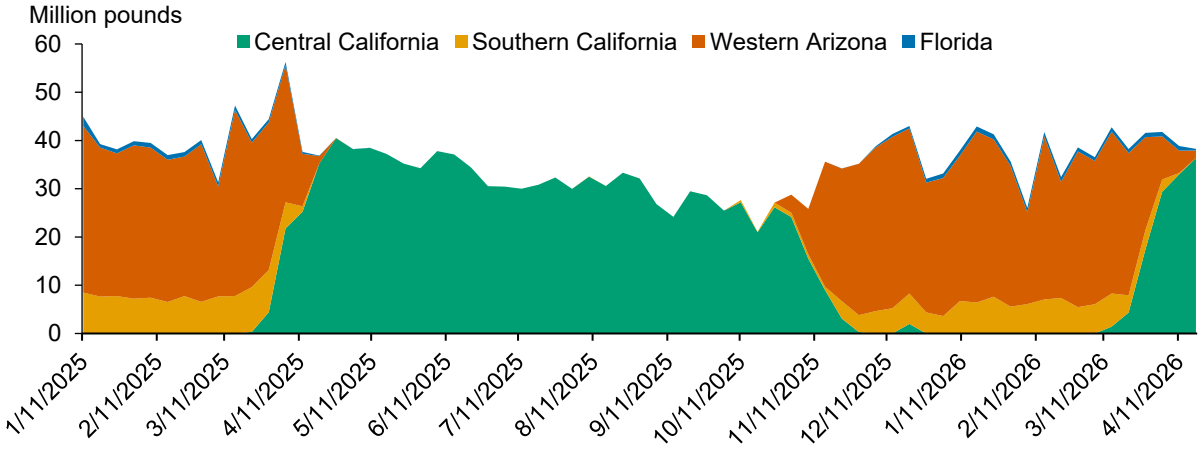
Lettuce trade: Fresh lettuce export volume fell from 742 million pounds in 2024 to 660 million pounds in 2025, the lowest volume since 1997. Romaine/leaf lettuce continued to account for the largest share of lettuce exports (70 percent), followed by head lettuce (29 percent), and packaged salad (1 percent). Canada continued to be the top destination for U.S. lettuce exports, accounting for 78 percent of volume. U.S. fresh lettuce import volume in 2025 was similar to exports (667 million pounds) and fell from the previous year (down 8 percent). Almost all import volume came from Mexico (81 percent) and Canada (12 percent).

Lettuce shipment volume and prices in 2026: In the first three months of 2026, domestic shipment volume was lower compared to last year for iceberg lettuce (down 11 percent),

romaine (down 5 percent), and leaf lettuce (down 13 percent). The largest year-over-year changes during this period occurred during February, primarily because of a combination of rain and high heat events in the Arizona/California desert region that lowered yield, reduced lettuce quality, and increased insect pressure. These tighter weather-related supplies pushed U.S. lettuce prices higher during February and early March. By mid-March 2026, weekly domestic lettuce shipment volume began to trend upward, and FOB prices trended downward as lettuce harvest began its seasonal shift from Western Arizona to Central California. By mid-April 2026, the transition to Central California as the primary domestic lettuce supplying region was nearly complete (figure 4).

Figure 4

In a matter of weeks: Domestic romaine lettuce shipments shift seasonally and regionally



Note: The Southern California category includes shipments originating from the following USDA, AMS reporting districts: Imperial Valley, Coachella Valley, Oxnard, and Palo Verde Valley.
Source: USDA, Economic Research Service using data from USDA, Agricultural Marketing Service *Market News*.

California's water outlook: California is the leading vegetable-producing State, accounting for nearly half of annual U.S. vegetable and melon cash receipts (2022–2024 average). About 30 percent of California's water supply is dependent on snowpack in the Sierra Nevada. In mid-April 2026, the California Department of Water Resources reported that Statewide snowpack was 23 percent of normal, reflecting reduced seasonal snowfall and extreme March heat that accelerated snowmelt. However, above-average rainfall since October 2025 has led to above-average storage levels in major water supply reservoirs throughout California at the end of April.

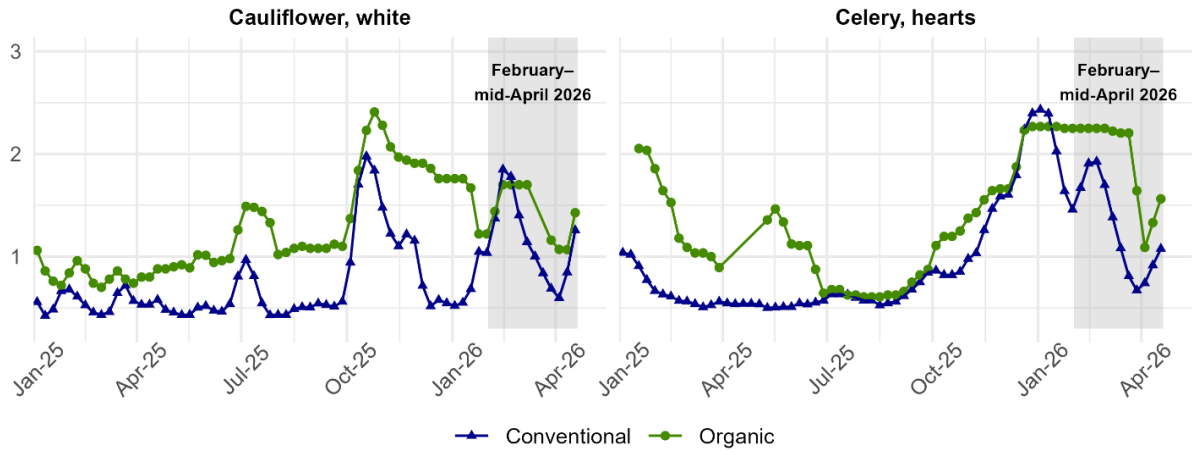
California receives 75 percent of its annual precipitation between November and March, making irrigation water critical for vegetable production throughout the summer and fall. Two major suppliers of agricultural irrigation water in California are the Central Valley Project (CVP) and the State Water Project (SWP). As of mid-April 2026, irrigation water allocations for CVP and SWP are lower than the previous 3 years. However, 2026 allocations for both projects are still above levels set in 2020–2022, when drought was prevalent.

Organic and Greenhouse Vegetables

FOB prices on weather rollercoaster in early 2026: During February 2026, domestic FOB prices rose for conventional and organic broccoli, cauliflower, celery, and romaine lettuce as unseasonably high temperatures in Western Arizona and Southern California lowered yields and reduced supply. Average FOB prices trended downward during March 2026 from the previous month's highs as weather improved during the end of Western Arizona's winter season and spring supply began to increase in California. The warmer than average spring has led to an earlier start for Central California vegetable growers despite periodic rain events in March and April. However, USDA, AMS shipment data and industry reports indicate that supplies remained tight in mid-April, with FOB prices trending higher for cauliflower, celery, and broccoli.

During February 2026, weekly average FOB prices for conventional and organic broccoli, cauliflower, and celery increased, but the organic price premium (the difference between the organic and the conventional price) fell (figure 5). Previous ERS research indicates that lower organic price premiums during periods of higher prices may be influenced by sensitivity of consumers' willingness to pay an organic premium. For some vegetables like iceberg lettuce, there also tend to be fewer organic FOB price quotes during periods of tight supplies and higher prices, which may indicate reduced availability of organic vegetables relative to conventional.

Figure 5
Springtime vegetable weekly domestic FOB prices
Dollars per pound



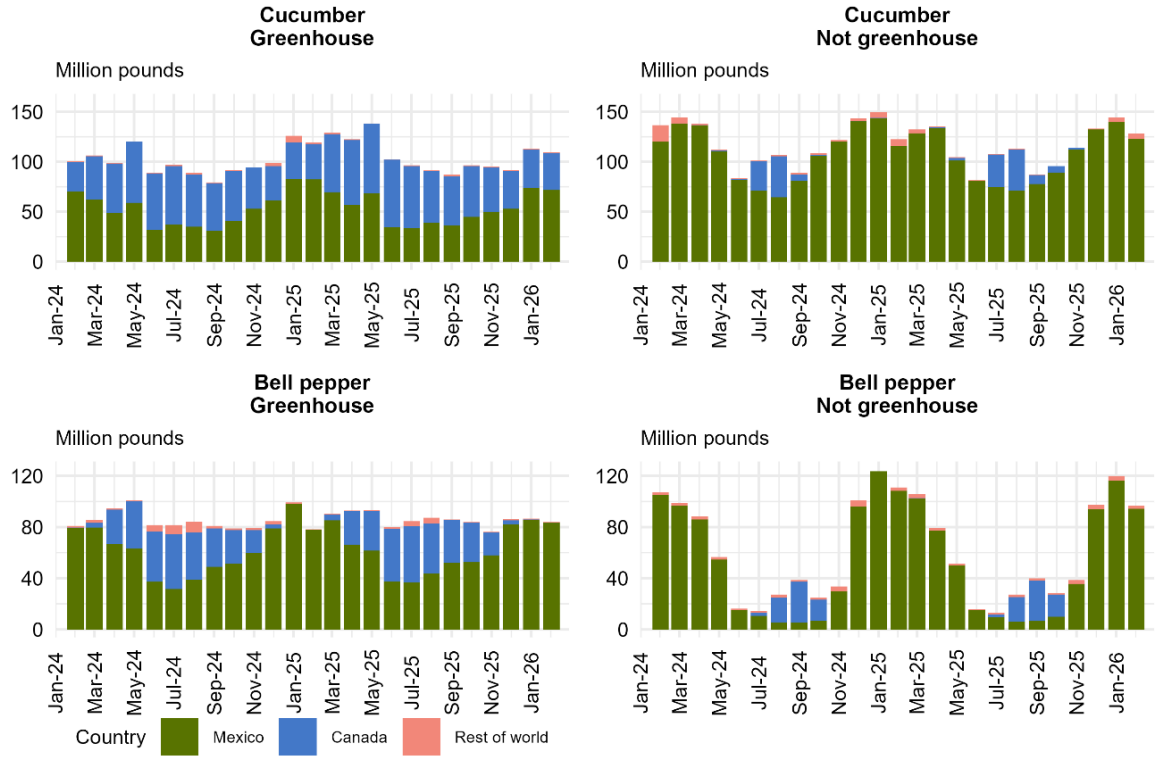
FOB = Free-on-board.
Note: Domestic prices only. Select packages and item sizes.
Source: USDA, Economic Research Service based on data from USDA, Agricultural Marketing Service, *Market News*.

Greenhouse fresh vegetable imports: The U.S. Department of Commerce, Bureau of the Census reports greenhouse-specific import codes for a limited set of fresh vegetables, including tomatoes, cucumbers, and bell peppers. In 2025, greenhouse imports represented 64 percent of

fresh tomatoes (2.86 billion pounds), 49 percent of fresh cucumber import volume (1.3 billion pounds), and 59 percent of fresh bell peppers (1.04 billion pounds). In the first two months of 2026, import volume rose for greenhouse tomatoes (up 6 percent), but fell for greenhouse cucumbers and bell peppers (down 9 and 4 percent, respectively) compared to the same period last year (table a7).

Seasonal changes in cucumber and bell pepper imports: In 2024 and 2025, greenhouse cucumber import volume was split nearly evenly between Mexico and Canada, with year-round imports from both countries (figure 6). By contrast, Mexico accounted for about 70 percent of annual greenhouse bell pepper imports, with imports from Canada concentrated during the summer months, when volumes from Mexico are lower. Imports designated as “not greenhouse-grown” for both cucumbers and bell peppers were sourced primarily from Mexico and exhibited more pronounced seasonality, with higher volumes arriving in winter and early spring compared with greenhouse-designated imports. In 2025, nearly all imported green-color bell peppers were not greenhouse-grown. Conversely, most orange and yellow bell peppers originated from greenhouse production, while red bell peppers were more evenly split between greenhouse (59 percent) and non-greenhouse (41 percent) imports.

Figure 6
Fresh cucumber and bell pepper imports by greenhouse designation



Source: USDA, Economic Research Service based on data from U.S. Department of Commerce, Bureau of the Census.

Processing Vegetables

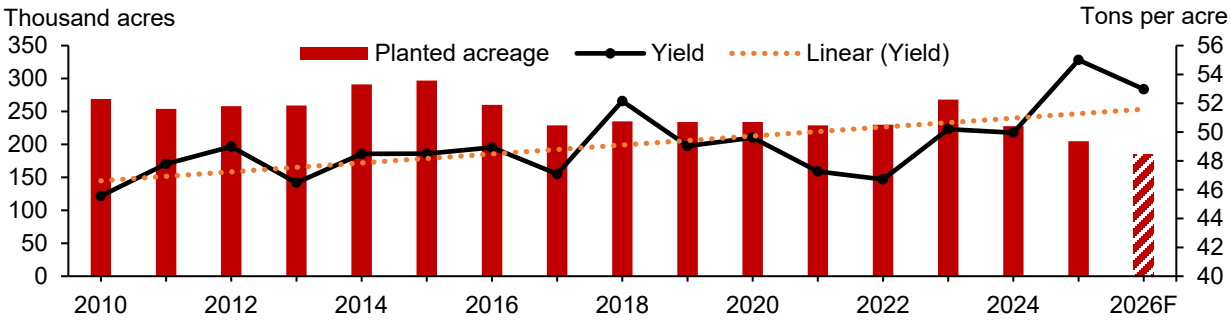
Many U.S. grown vegetables are intended for processing through methods such as freezing, canning, drying, or pickling. U.S. vegetables grown for the processing market (excluding potatoes, pulses, and mushrooms) totaled 35.6 billion pounds on a farm-weight basis in 2025. Tomatoes are the top processing vegetable crop, accounting for 65 percent of U.S. processing vegetable production by volume in 2025.

Processing Tomatoes: Record Yields in 2025

Record high yields for 2025 processing tomato crop: Of the 12.3 million tons of tomatoes grown in the United States in 2025, almost all (94 percent) were for the processing market. Processing tomato production totaled 11.6 million tons, increasing 5 percent from 11.1 million tons in 2024. California processing tomato yields increased 10 percent year over year to a record-high 55 tons per acre. Exceptional yields offset the lowest harvested acreage since 1972. The larger 2025 crop and higher stocks put downward pressure on prices, and processing tomato grower prices decreased 7 percent from $116 per ton in 2024 to $108 per ton in 2025.

2026 processing tomato crop forecast down: Almost all (99 percent) of processing tomato acreage is contracted. The most recent edition of the USDA, NASS *2026 California Processing Tomato Report* (released January 2026) indicates that contracted processing tomato acreage will continue to decline in 2026 for the third consecutive year (figure 7). Contracted planted acres are forecast to be 185,000 acres in 2026, a decrease of 20,000 acres (-10 percent) and falling below 200,000 acres for the first time since the 1970s. Contracted processing tomato production is forecast to be 9.8 million tons (19.6 billion pounds), the lowest since 2005. This estimate is based on an expected yield of 53 tons per acre, which would be the second highest on record behind 55 tons per acre in 2025, if realized.

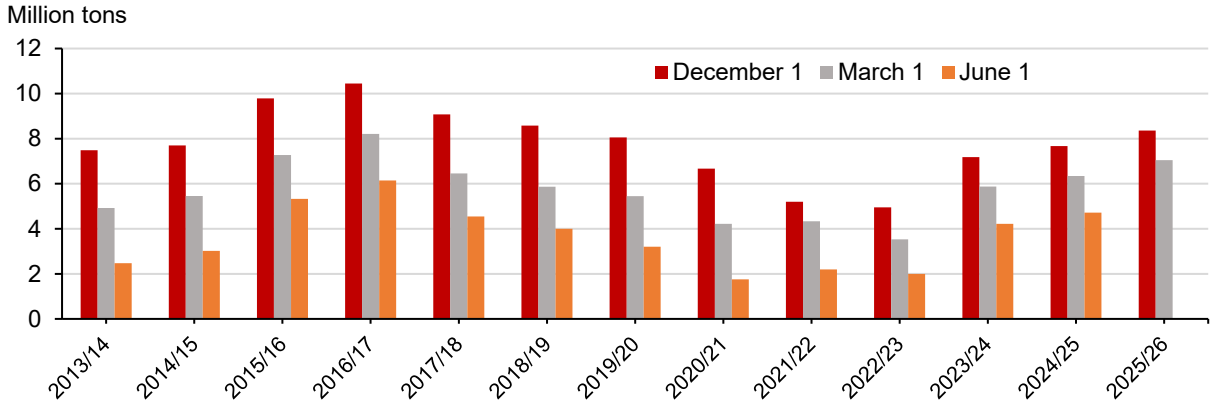
Figure 7
Processing tomato planted acreage declining and yields rising



F = Forecast.
Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, *California Processing Tomato Report* (various issues).

Processed tomato inventory higher to start off 2025/26 pack year: The California League of Food Processors (CLFP) estimates U.S. processed tomato pack and inventory on a June 1 to May 31 pack year. Most inventory is held in tomato paste, and estimates are released for December 1, March 1, and June 1 of each pack year. Following a larger 2025 processing tomato crop, the December 1 inventory estimate for the 2025/26 pack year was the highest in 7 years (figure 8). The CLFP estimates bulk tomato paste stocks, including inventory held for remanufacture, were 7.04 million tons on a raw product "paid-for tons" equivalent basis as of March 1, 2026. This is an increase of 11 percent from the March 1, 2025, estimate of 6.34 million tons and the highest March 1 estimate since the 2016/17 pack year.

Figure 8
Bulk tomato paste inventory trending higher in recent years



Note: Pack year runs from June 1 to May 31.
Source: USDA, Economic Research Service based on data from the California League of Food Processors, *U.S. Tomato Stock on Hand* reports.

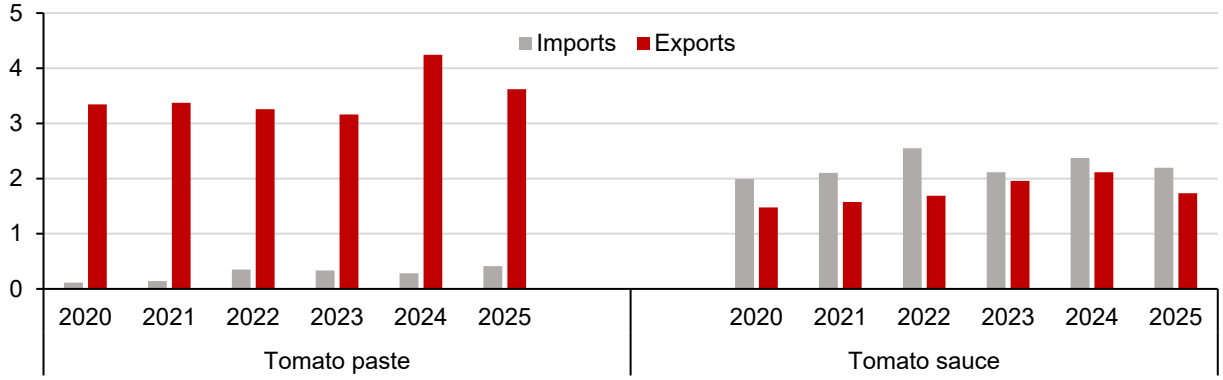
Processing tomato trade: The United States is an overall net exporter of processed tomatoes, though this varies by type of tomato product. In 2025, the U.S. was a net exporter of tomato paste, ketchup, and whole canned tomatoes, but a net importer of tomato sauces, tomato juice, and frozen or dried tomatoes. Tomato paste and tomato sauce are the largest categories by volume, collectively accounting for 80 percent of processed tomato imports and 85 percent of exports on a fresh-weight basis in 2025 (figure 9).

Based on data from the World Processing Tomato Council, the United States was the top producer of processing tomatoes in 2025 and accounted for 26 percent of global production. The United States is a major tomato paste exporter, shipping a total of 666.5 million pounds (3.62 billion pounds on a fresh-weight basis) of tomato paste to 75 countries in 2025. Conversely, the United States is a net importer of tomato sauces, importing a total of 676.7 million pounds (2.2 billion pounds on a fresh-weight basis) of tomato sauce in 2025. Italy remained the leading foreign supplier of U.S. tomato sauce imports, accounting for 83 percent of volume in 2025.

Figure 9

The United States is a tomato paste net exporter and tomato sauce net importer

Billion pounds, fresh-weight basis



Note: The fresh-weight conversion factor is 5.432 for tomato paste and 3.247 for tomato sauce.
Source: USDA, Economic Research Service based on data from U.S. Department of Commerce, Bureau of the Census.

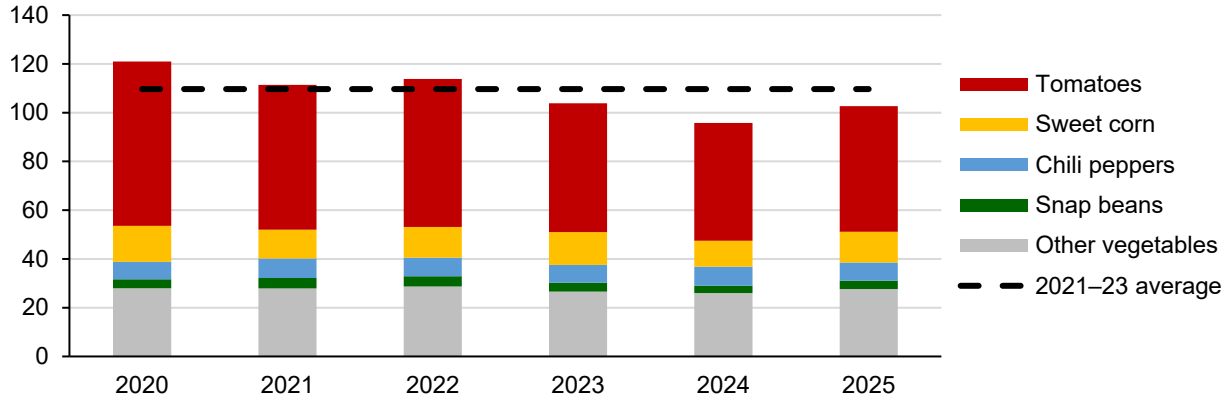
Processing Vegetable Per Capita Availability Higher in 2025

USDA, ERS estimates a preliminary 102.7 pounds of processing vegetables (excluding mushrooms, potatoes, and sweet potatoes) were available per person on a fresh-weight basis in 2025. This estimate is 7-percent higher than the 2024 low of 95.8 pounds but still 6 percent below the previous 3-year average of 109.7 pounds (2021–23) (figure 10). Four commodities accounted for about three-quarters of processing vegetable availability: tomatoes (52 percent), sweet corn (12 percent), chili peppers (7 percent), and snap/green beans (3 percent). Availability increased year over year for three of the top four processing vegetables: tomatoes, sweet corn, and snap beans.

Figure 10

Processing vegetable availability up from 2024 low but below 2021–23 average

Pounds per person



Note: Fresh-weight equivalent.
Source: USDA, Economic Research Service calculations based on data from USDA, National Agricultural Statistics Service and U.S. Department of Commerce, Bureau of the Census.

Per capita availability of processing **tomatoes** was estimated at 51.5 pounds per person in 2025, an increase of 3.3 pounds or 7 percent year over year. Supplies increased on higher U.S. production. Of the 24.7 billion pounds of tomatoes grown in the U.S. in 2025, almost all (about 95 percent) were for the processing market. Processing tomato production totaled 23.3 billion pounds, increasing 5 percent year over year on record high yields in California. Imports of processing tomato products decreased 3 percent to 2.83 billion pounds on a fresh-weight basis in 2025. Imports accounted for 16 percent of processed tomato availability in 2025, up from about 7 percent a decade ago (2014–16).

Per capita availability of processing **sweet corn** was estimated at 12.6 pounds per person in 2025, an increase of 18 percent, or 2 pounds, year over year. Supplies increased year over year on higher U.S. production and imports. Of the 5.78 billion pounds of sweet corn grown in the United States in 2025, about 74 percent was destined for the processing market. Processing sweet corn production totaled 4.26 billion pounds, increasing 11 percent from 3.83 billion pounds in 2024. Imports increased 26 percent year over year to 542.1 million pounds on a fresh-weight basis, with higher volumes of frozen sweet corn from Canada and canned sweet corn from Thailand. Imports accounted for almost 13 percent of processed sweet corn availability in 2025, up from about 6 percent a decade ago (2014–16).

Per capita availability of **chili peppers** (all uses) was estimated at 7.5 pounds per person in 2025, a decrease of 4 percent or 0.3 pounds year over year. Imports accounted for 95 percent of chili pepper availability in 2025, with almost all (97 percent) originating in Mexico. Fresh chili pepper import volume decreased 7 percent year over year to 988.1 million pounds, the lowest since 2020. Imports were lower year over year from August to December 2025, with volume from Mexico down 14 percent during this period.

Per capita availability of processing **snap beans** was estimated at 3.4 pounds per person in 2025, an increase of 13 percent, or 0.4 pounds, year over year. Supplies increased year over year on higher U.S. production and imports. Of the 1.16 billion pounds of snap beans grown in the United States in 2025, about 79 percent was destined for the processing market. Processing snap bean production totaled 916.6 million pounds in 2025, increasing 12 percent from 819.8 million pounds in 2024. Imports increased 9 percent year over year to 236 million pounds on a fresh-weight basis, with higher volumes of frozen and canned snap beans from Canada and Mexico. Imports accounted for about 20 percent of processed snap bean availability in 2025, up from about 10 percent a decade ago (2014–16).

Processing Vegetable Trade: Import and Export Values Lower

Processing vegetable trade in 2025: For both imports and exports, frozen vegetables account for the largest share of trade value (about 50 percent), followed by prepared/preserved vegetables, dried vegetables, and vegetable juices. The value of processed vegetable imports and exports decreased in 2025, with lower trade of processed vegetable items like frozen potatoes and prepared or preserved tomato products (table b8 and table b9).

The value of **processed vegetable exports** decreased 7 percent year over year to $3.55 billion in 2025. The export value of **frozen vegetables** decreased 6 percent year over year to $1.69 billion in 2025. Potatoes are the top frozen vegetable export, accounting for $1.41 billion or 83 percent of export value in 2025. Frozen potato export volume was 4 percent lower year over year. Excluding potatoes, frozen vegetable export value was $284 million in 2025, decreasing 3 percent year over year on decreases of frozen sweet corn, green peas, and snap beans. The export value of **prepared/preserved vegetables** decreased 8 percent year over year to $1.54 billion in 2025. Tomatoes are the top prepared/preserved vegetable export, accounting for $802.9 million, or 52 percent, of export value in 2025. Prepared/preserved tomato export value was 12 percent lower year over year, with lower export volumes of tomato paste, tomato sauces, and ketchup.

The value of **processed vegetable imports** decreased 2 percent year over year to $7.86 billion in 2025. The import value of **frozen vegetables** decreased 4 percent year over year to $3.91 billion in 2025. Potatoes are the top frozen vegetable import, accounting for $2.05 billion or 52 percent of import value in 2025. Frozen potato import volume was 5 percent lower year over year, with import volume from top supplier Canada decreasing 6 percent. Excluding potatoes, frozen vegetable import value was $1.86 billion in 2025, increasing 3 percent year over year on increases in frozen broccoli, sweet corn, and green peas. The import value of **prepared or preserved vegetables** increased 1 percent year over year to $3.11 billion in 2025. Tomatoes are the top prepared/preserved vegetable import, accounting for $791 million, or 25 percent, of prepared/preserved vegetable import value in 2025. Prepared/preserved tomato import value was 7 percent lower year over year, with lower volumes of tomato sauces from Italy and canned whole tomatoes from both Italy and Mexico.

Import share of availability for processing vegetables: In 2025, imports accounted for 36.3 percent of processed vegetable availability, though shares vary widely by commodity. Processing vegetable commodities with import shares of availability at or above 70 percent include broccoli (97 percent), chili peppers (95 percent), spinach (90 percent), asparagus (72

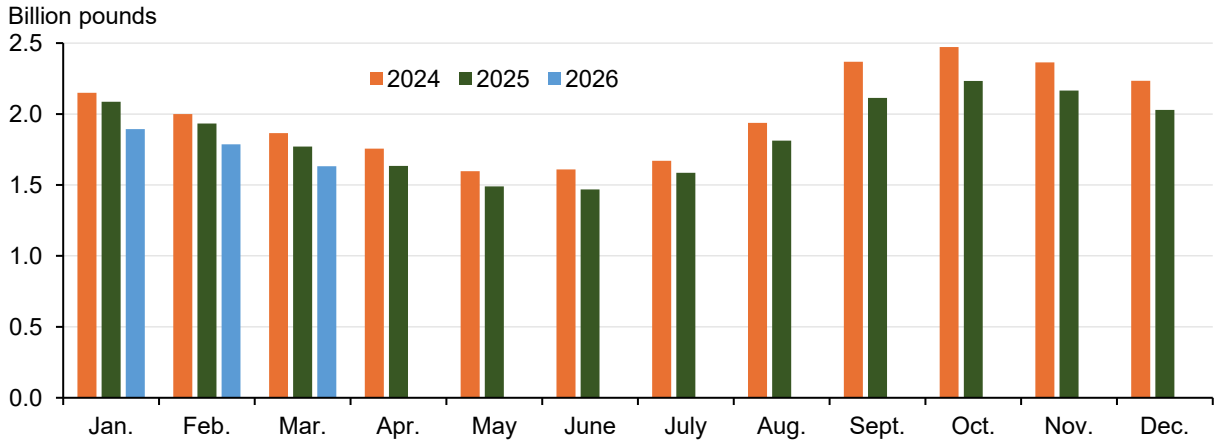
percent), and cauliflower (71 percent). For many of these commodities, U.S. production is concentrated in the fresh market rather than the processing market. Of the broccoli, spinach, and cauliflower grown in the United States in 2025, more than 90 percent of production was for the fresh market; for asparagus, 77 percent of domestic production was for the fresh market.

Processing vegetable commodities with import shares of availability at or below 20 percent include cabbage (4 percent), lima beans (8 percent), sweet corn (13 percent), carrots (14 percent), cucumbers (15 percent), tomatoes (16 percent), and snap beans (20 percent). For many of these commodities, U.S. production is concentrated in the processing market rather than the fresh market. For sweet corn, snap beans, and cucumbers, more than 75 percent of U.S. production is for processing rather than the fresh market; for tomatoes, almost all (about 95 percent) of U.S. production was for processing.

Processing Vegetable Cold Storage Holdings Lower

Frozen vegetable cold storage holdings shift seasonally. They are lowest in early summer and typically peak in October. Frozen vegetable stocks (excluding potatoes) in cold storage warehouses were lower throughout 2025 and into early 2026 compared to the same months the previous years (figure 11). By October 2025, the volume of vegetables in cold storage was 10 percent lower than October 2024, with lower volumes of major frozen vegetable commodities, such as sweet corn, peas, carrots, and green beans. In the first quarter of 2026, frozen vegetable cold storage holdings remained below the previous year's levels, averaging 8 percent lower than the first quarter of 2025.

Figure 11
Vegetable cold storage holdings lower throughout 2025 and into 2026



Note: Vegetables held in cold storage excluding potatoes.
Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service.

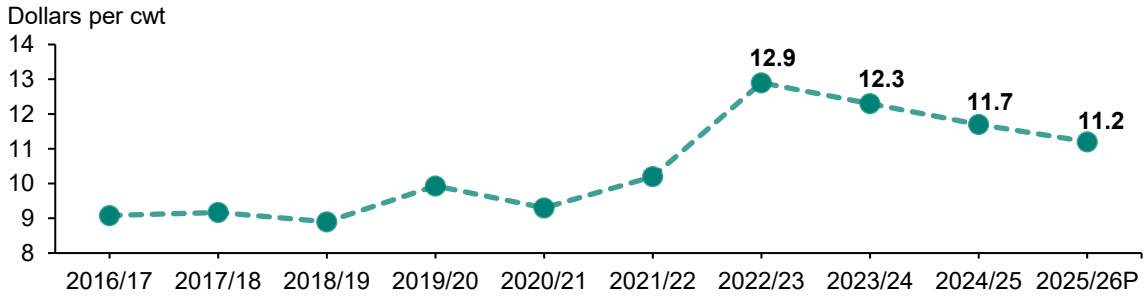
Potatoes

Taking Stock of the Potato Market with Spring Planting Underway

The USDA, NASS season average potato price reflects growers' returns for all uses and sales methods during the marketing year (September–August). Over the past three seasons, the average share of U.S. potato sales volume consisted of four categories: processing (70 percent), fresh table stock (25 percent), seed (5 percent), and livestock feed (0.3 percent). Processing prices exhibit relatively limited year-to-year volatility because of pre-planting contracts with processors (fryers, chip makers, and dehydrators). Fresh prices, though representing a smaller share of sales, are more sensitive to changes in production, typically higher relative to processing prices, and vary widely by State and variety.

Lower acreage and prices: During the 2022/23, reduced acreage and below-trend yield tightened supplies and elevated the season average grower price. Potato acreage and yield rose in 2023/24, increasing production by 9 percent and lowering the average grower price by 5 percent. Growers subsequently reduced acreage in 2024/25 and 2025/26, resulting in production declines of 4 percent and 2 percent, respectively. Despite lower output, the season average price fell 5 percent in 2024/25 and is projected to fall 4 percent in 2025/26 (figure 12). At $11.20 per cwt, the USDA, NASS preliminary 2025/26 season average price is 13 percent lower than the nominal record high in 2022/23 ($12.90 per cwt). ERS expects the lower preliminary price reflects modest declines in processing contract prices and continued downward pressure on fresh prices in 2025/26. USDA, AMS data indicate increased open-market shipments of russet potatoes, particularly from Idaho, have contributed to softer fresh prices compared to last season. Retail prices are lower as well, with Potato CPI averaging 3 percent below year-earlier levels over the past five months. These softer prices are expected to be a contributing factor to a reduction in planted acreage in 2026.

Figure 12
Potato season average grower prices, 2016/17–2025/26P



Cwt = 100 pounds. P = Preliminary.
Note: Potato marketing year begins in September and ends in August of the following year.
Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service.

Potato stocks, processing usage, and cold storage in 2025/26: Potatoes held in storage, which include processor holdings (unprocessed fresh potatoes) and most of the seed to plant the following year's crop, were 1 percent lower on April 1, 2026, compared to the same period last year and 8 percent lower than two years ago. The quantity of potatoes used for processing in 2025/26 marketing year through March 2026 was 152.6 million cwt, a 3-percent increase from last season but 2 percent lower than the same period in 2023/24. The increase was driven by higher processing volumes in Idaho, Washington, and Oregon, which together accounted for 82 percent of 2025/26 season-to-date volume based on 8 NASS-surveyed States. Combined processing volume in the other 5 surveyed States (Colorado, Maine, Minnesota, North Dakota, and Wisconsin) totaled 27.7 million cwt, a 3-percent reduction from last season. Season-to-date 2025/26 processing volume is not reported by usage. However, over the previous five marketing years, the largest processing categories were frozen french fries (56 percent), potato chips (21 percent), and dehydrated potatoes (15 percent).

The uptick in processing volume has coincided with increased frozen potato products in cold storage. On March 31, 2026, frozen french fries in cold storage totaled 1.06 billion pounds (10.59 million cwt), a 9-percent increase from the same month a year ago. This is the highest monthly volume since March 2020, when foodservice demand fell sharply at the onset of the Coronavirus (COVID-19) pandemic. Including other frozen potato products, total frozen potato stocks reached 1.3 billion pounds at the end of March 2026, reflecting a 15-percent increase from December 31. Such inventory buildup aligns with typical seasonal patterns: over the previous 10 seasons, stocks rose between 2 and 14 percent from January through March. Elevated frozen inventories are consistent with stronger processing activity in early 2026. If U.S. frozen french fry exports remain sluggish in the second half of 2025/26, higher inventories could reduce demand for U.S. fry imports from Canada and the European Union.

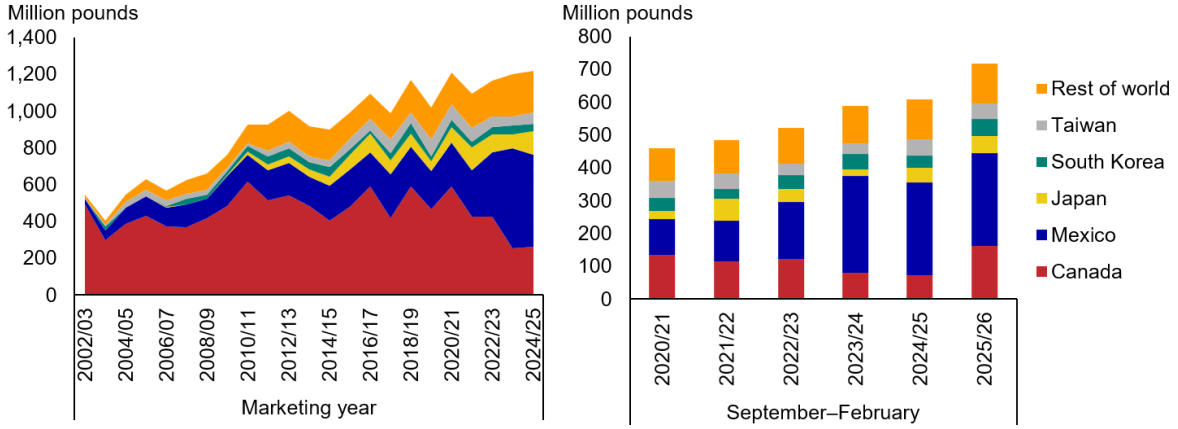
Domestic chipping potato shipments in 2025/26 continue to trail last season, according to USDA, AMS *Market News* weekly movement data. From September 2025 through mid-April 2026, chipping potato shipments were 10 percent below the same period last year and 18 percent below levels two seasons earlier. This reduced shipment volume suggests weaker demand from potato-chip processors. In contrast, domestic fresh-market (table stock) potato shipments to date in 2025/26 are 1 percent higher than the same period in the prior two seasons.

Potato trade value declines in 2025/26: In the first half of marketing year 2025/26 (September–February), U.S. exports of all potatoes and potato products (including starch) totaled $1.06 billion, down 5 percent from a year earlier. The decline reflects an 11-percent

reduction in frozen french fry exports, which accounted for 53 percent ($567 million) of total export value during this period. Season-to-date imports of all potatoes and potato products totaled $1.44 billion, down 12 percent from a year earlier. With import values falling more sharply than exports, the season-to-date U.S. trade deficit for potatoes and potato products decreased by 27 percent in 2025/26 relative to 2024/25.

U.S. fresh potato exports reach record high in first half of 2025/26: U.S. exports of fresh potatoes (excluding seed) totaled 718 million pounds in the first six months of 2025/26 (September–February), the highest volume on record for this period (table c10). Season-to-date exports rose 18 percent by volume compared to a year ago, supported by increases to Canada (up 124 percent), Japan (up 19 percent), and South Korea (up 36 percent). Exports to Mexico were nearly unchanged from last year (down 0.6 percent) but remained 109 percent above the 2019/20–2021/22 average at 282 million pounds. In mid-2022, regulatory changes expanded market access for U.S. fresh potatoes in Mexico. In the first two full marketing years under the new policy (2023/24 and 2024/25), Mexico surpassed Canada as the top destination for U.S. fresh potatoes, accounting for more than 40 percent of total export volume each season. Japan has ranked third for the past four marketing years, with volumes reaching a record 127 million pounds in 2024/25. Because of Japan's trade policies, all U.S. fresh-potato exports to the country are limited to chipping potatoes used for potato chip processing.

Figure 13
Fresh potato export volume higher in marketing year 2025/26

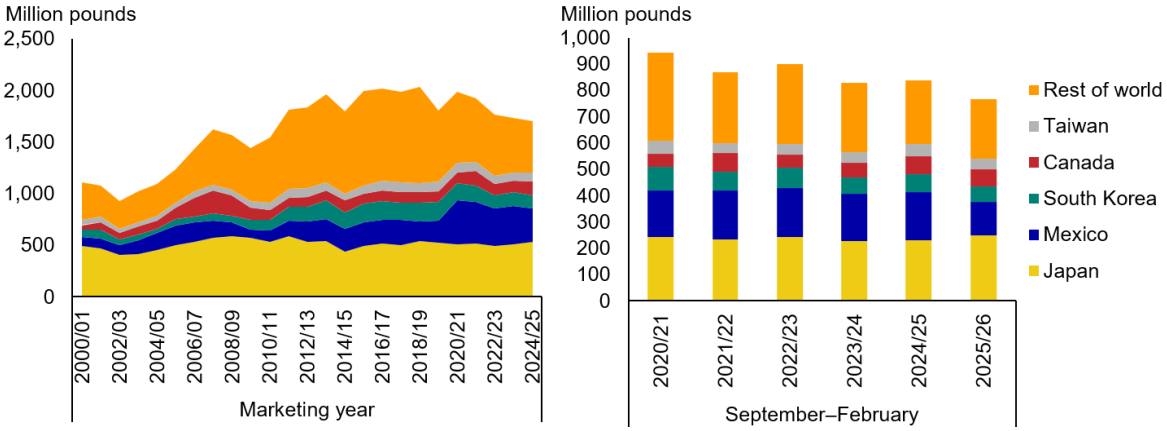


Note: Potato marketing year begins in September and ends in August of the following year. Export volume excludes seed potatoes.
Source: USDA, Economic Research Service based on data from U.S. Department of Commerce, Bureau of the Census.

U.S. frozen french fry exports and imports are lower this season: Globally, the United States is both a major exporter and importer of frozen french fries. In the first half of 2025/26, U.S. frozen french fry exports were 766 million pounds, down 9 percent from the same period last year (figure 14). This is the lowest September–February french fry export volume since 2010/11. Increased frozen french fry export volume to top destination Japan (up 8 percent) was

unable to offset double-digit percentage declines to Mexico (down 30 percent), South Korea (down 15 percent), and Taiwan (down 11 percent). Season to date (September–February) french fry imports in 2025/26 totaled 1.23 billion pounds, down 7 percent from last year. Nearly all imports came from Canada (87 percent) or the European Union (11 percent). Compared to last season, imports from Canada declined 6 percent by volume and 12 percent by value, while imports from the European Union fell 10 percent by volume and 17 percent by value. The United States is Canada's largest export market for frozen potato products, accounting for 82 percent of season-to-date export volume followed by Mexico (6 percent) and Japan (3 percent).

Figure 14
Frozen french fry export volume lower in marketing year 2025/26



Note: Potato marketing year begins in September and ends in August of the following year.
Source: USDA, Economic Research Service based on data from U.S. Department of Commerce, Bureau of the Census.

Potato planted acreage expectations in 2026: Given lower fresh grower prices and stagnant demand for contracted processing-potato acreage, ERS expects 2026 potato planted acres to decrease by about 2 percent in the 13 NASS-surveyed States[3], falling from 902,000 acres in 2025 to 882,000 acres. If realized, 2026 would mark the third consecutive year acreage declined and the smallest potato acreage in the 13 NASS-surveyed States since 1952. Most of the reduction is expected in Idaho, which accounted for about one-third of U.S. potato production last year. In 2025, 8 of the 13 surveyed States reduced acreage year over year, including a 20,000-acre decrease in Washington (the second largest potato-producing State behind Idaho). Idaho's planted area was unchanged between 2024 and 2025 at 315,000 acres, a lower level than 2023 (330,000 acres) but above 2022 (295,000 acres). USDA, NASS will release its initial 2026 potato acreage forecast in the *Acreage* report on June 30, 2026. ERS will analyze the 2026 forecast, State-level crop conditions, and potato production expectations in the *Vegetable and Pulses Outlook: July 2026* report.

[3]The 13 NASS-surveyed States for potatoes include California, Colorado, Florida, Idaho, Maine, Michigan, Minnesota, Nebraska, North Dakota, Oregon, Texas, Washington, and Wisconsin.

Pulse Crops:
Dry Beans, Peas, Lentils, and Chickpeas

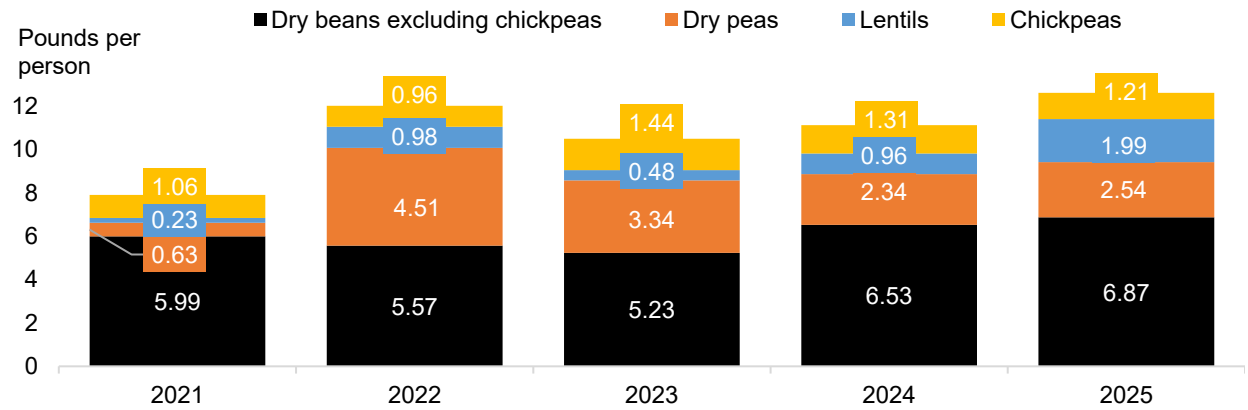
Upcoming July Vegetables and Pulses Outlook

The upcoming July 2026 *Vegetables and Pulses Outlook*, a USDA, ERS edition which began in 2024, will primarily focus on potatoes and pulses. The upcoming July issue represents a more targeted scope compared to the more comprehensive coverage of all vegetables and pulses in the April and December outlook editions.

Pulse Crop Per Capita Availability Rises by 11 Percent in 2025, Led by Increased Lentil Availability

Per capita availability commonly reflects the quantity available for domestic use per person, based on production, trade, and population. While often used as a proxy for consumption, it does not account for food loss or waste. Preliminary estimates indicate U.S. pulse per capita availability increased by about 1.5 pounds per person in 2025 (up 13 percent). Lentils accounted for roughly two-thirds of this increase, rising by about 1 pound per person, while changes in other pulse crops were comparatively small and partly offset by a decline in chickpea availability (figure 15). The increase in lentil availability reflects both higher domestic production and reduced export volumes, with lower exports amplifying the amount available for domestic use. Dry beans (excluding chickpeas) accounted for about 54 percent of total pulse availability in 2025, with pinto and black beans comprising the majority, while availability changed only modestly over the year.

Figure 15
U.S. dry pulses: Per capita availability/1, 2021–25



1/ Calendar year annual domestic availability per person.
Source: USDA, Economic Research Service.

Dry Bean, Lentil, and Chickpea Acreage Expected to Decline in 2026, While Dry Peas Acreage Rises Marginally

The USDA, NASS March 2026 *Prospective Plantings* report indicates pulse crop planted acreage is expected to decline from the previous year, reflecting lower intended area for dry beans, lentils, and chickpeas. Dry edible bean area (excluding chickpeas) is expected to decline about 10 percent from a year earlier and remain below its 5-year average (table d11), while lentil acreage is expected to fall sharply (down about 22 percent over year) but above its 5-year average (table d13). Chickpea acreage is also expected to decline (down about 7 percent) but continued to exceed its 5-year average (table d14). In contrast, dry edible pea acreage is expected to be little changed (up by less than 1 percent) and remain above its 5-year average (table d12).

At the State level, planting intentions generally reflected these national trends, with changes in the largest planted acreage States driving much of the overall movement. Lentil acreage declines were concentrated in Montana and North Dakota, which together account for more than 90 percent of U.S. lentil acreage, with intended plantings of about 620 and 155 thousand acres, respectively. Intended lentil acreage is expected to decline about 25 percent in Montana and 16 percent in North Dakota. Dry bean area declined across most major States, including North Dakota (down 12 percent to 510,000 acres, a record low), Michigan (down 10 percent), and Minnesota (down 8 percent). Dry pea acreage varied across States, with a 3-percent increase in Montana, the State with the largest planted acreage, where planted area reached a record high of 710,000 acres, contributing more to overall area than similar gains elsewhere. Chickpea area increased sharply in North Dakota (up 49 percent) but declined in Idaho (down 16 percent) and Washington (down 21 percent).

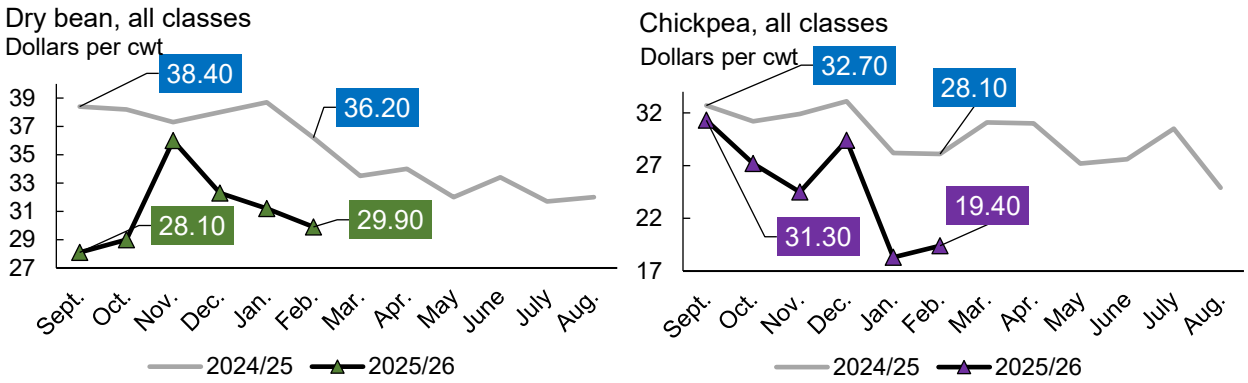
Pulse Grower Prices in 2025/26 Below Previous Year

Monthly nominal grower prices declined across all major pulse crops in the 2025/26 marketing year through February, compared with the same period a year earlier. Dry bean prices reached their lowest January and February levels since the 2019/20 marketing year. In contrast, prices for chickpeas, dry peas, and lentils declined and are below long-term averages.

Dry bean and chickpea nominal grower prices: Monthly nominal grower prices for dry beans and chickpeas during the 2025/26 marketing year (September through February) were below the same period a year earlier (figure 16). Dry bean prices declined about 18 percent, with prices beginning the marketing year below previous year's levels, increasing modestly in late

fall, and then easing into winter months. Chickpea prices fell about 19 percent over the same period, declining through the fall before stabilizing at lower levels in early 2026 (figure 16); declines were more pronounced for small chickpeas relative to large chickpeas (table d15 and table d16).

Figure 16
U.S. dry edible bean and chickpeas: Average monthly grower price

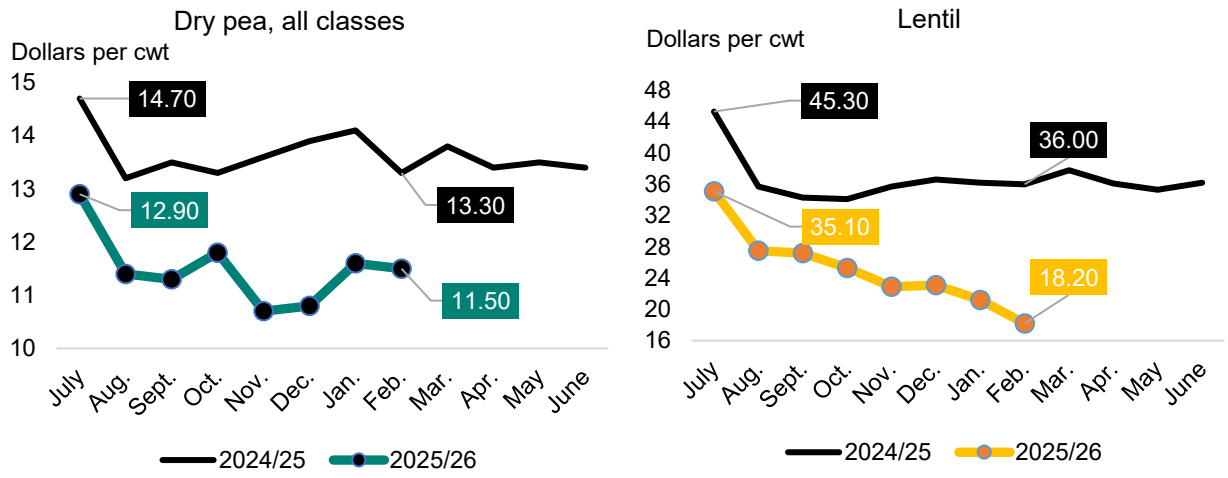


Cwt = hundredweight, a unit of measure equal to 100 pounds.
Note: The marketing year for dry beans and chickpeas begins in September and ends in August of the following year.
Source: USDA, Economic Research Service based on data from National Agricultural Statistics Service, *QuickStats.*

For dry beans and chickpeas, production and stocks account for the majority of total supply and remain the primary drivers of availability. Production trends in recent years have been mixed across crops, and domestic supply conditions are not yet fully reflected in current data. Declining net exports through February 2026 for both crops have increased supply available for domestic use. Trade plays a relatively larger role in chickpeas, given higher import and export shares of availability than dry beans, making chickpea availability more sensitive to trade changes. These dynamics suggest continued pressure on dry bean and chickpea prices throughout the remainder of the marketing year.

Dry pea and lentil nominal grower prices: Monthly nominal grower prices for dry peas and lentils during the 2025/26 marketing year (July through February) were below the same period a year earlier (figure 17). Dry pea prices declined about 16 percent, trending lower through the fall before stabilizing in early 2026, while lentil prices also declined over the same period. Net exports for both dry peas and lentils declined sharply through February 2026, increasing supply available for domestic use and placing downward pressure on prices. These dynamics suggest continued pressure on dry pea and lentil prices through the remainder of the marketing year.

Figure 17
U.S. dry edible pea and lentil: Average monthly grower price



Cwt = hundredweight, a unit of measure equal to 100 pounds.
Note: The marketing year for dry peas and lentils begins in July and ends in June of the following year.
Source: USDA, Economic Research Service based on data from National Agricultural Statistics Service, *QuickStats*.

Trade Highlights for Pulses in 2025/26: Declining Net Exports

The United States is typically a net exporter of pulses. Domestic production exceeds import needs, keeping imports a relatively small share of availability. The dry bean and chickpea marketing year spans September–August of the following year, while the dry pea and lentil marketing year spans July–June. The following highlights summarize trade developments from the start of each crop's 2025/26 marketing year through February 2026 (tables d17–d22).

U.S. pulse exports declined across all major crops through February 2026, with the largest reductions occurring in dry peas and lentils. **Dry bean** net exports declined from 374 million pounds in 2024/25 to 253 million pounds in 2025/26 through February 2026. Exports totaled 401 million pounds, and imports were 148 million pounds over the same period. **Chickpea** net exports declined modestly by 2 percent to 62 million pounds in 2025/26 through February 2026, continuing their recovery from net import status in 2022/23. **Dry pea** net exports declined sharply, falling 62 percent to 171 million pounds in 2025/26 through February 2026, reflecting a 53-percent reduction in export volumes compared with the previous year. **Lentil** net exports declined 74 percent to 126 million pounds through February 2026, reflecting a substantial reduction in export volumes. These declines are consistent with the price movements observed earlier in the report.

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