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Vegetables and Pulses Outlook: July 2025

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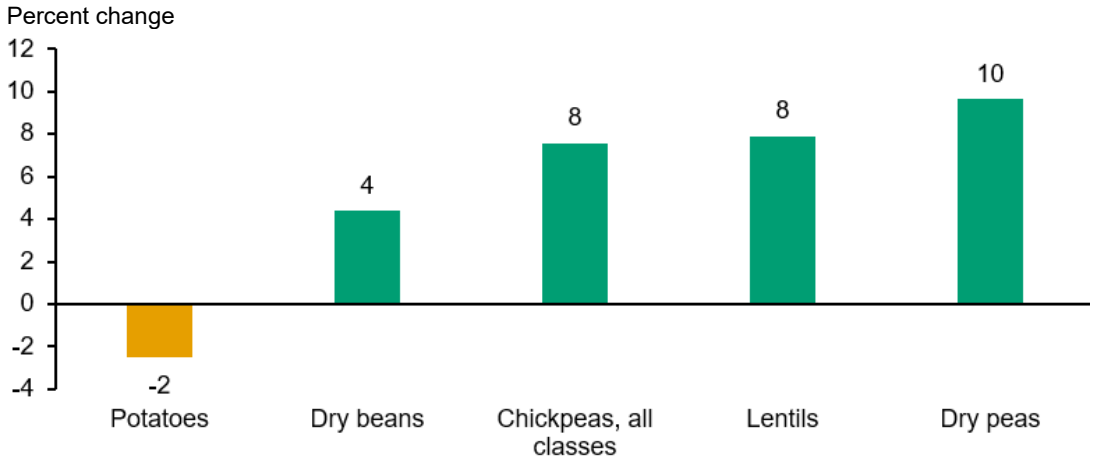
2025 Planting Trends Hold: Pulses Up, Potatoes Down

In this report:

[Data tables are available in separate Excel file.]

The USDA, National Agricultural Statistics Service (NASS) *Acreage* report, released on June 30, 2025, forecasts another year of expanded plantings for pulses (dry beans, chickpeas, lentils, and dry peas) and continued contraction for potatoes—mirroring trends highlighted in the July 2024 Outlook. However, the pace and pattern of change has shifted. Lentils, which realized a steep increase last year, are now projected to rise more modestly, while dry peas lead the gain in 2025. By contrast, potato planted area is again forecast lower—down 2 percent from 2024, with declines expected in 4 of the 13 surveyed States.

Pulses up and potatoes down: Year-over-year change in planted acres, 2024–25F



F = Forecast.
Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, *Acreage* (June 2025).

Industry Overview

This issue focuses exclusively on potatoes and pulse crops. The spring and winter issues will include other categories, such as fresh vegetables, processed vegetables, and mushrooms. Figures 1 and 2 offer industry snapshots for potatoes and pulses, respectively.

Potatoes: The USDA, National Agricultural Statistics Service (NASS) 2025 potato planted acreage forecast in the top 13 potato-producing States is 912,000 acres, a 2-percent reduction from last year. If this estimate is realized and the average U.S. yield is close to trendline, production would fall 1 percent year over year. On June 1, 2025, potato stocks were 8 percent lower compared to the same month last year but 3 percent higher than the previous 3-year average. The USDA, Economic Research Service (ERS) preliminary per capita availability of potatoes for calendar year 2024 is 116.3 pounds, almost unchanged from 2023.

Dry beans: Planted acreage estimates indicate a 4 percent increase over the September 2024–August 2025 marketing year, with gains in 5 of the 7 surveyed States. Exports fell 11 percent in the 2024/25 marketing year through May 2025, while higher stocks offset reduced imports. The average price received by U.S. growers was down 16 percent from the prior marketing year through May 2025. Per capita availability rose 30 percent to 6.8 pounds in 2024, driven by increased pinto, kidney, and black bean supplies.

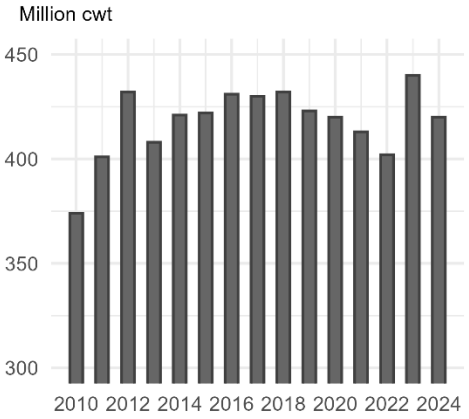
Chickpeas: Acreage estimates indicate an 8 percent increase over the September 2024–August 2025 marketing year, with stocks up 36 percent by June 2025 from the previous year. Imports in the 2024/25 marketing year through May 2025 declined by 37 percent, while exports declined slightly—less than half a percent. The average price was 15 percent lower than in 2023/24. Per capita availability in 2024 decreased by 9 percent from the previous year, largely because of lower imports and stock drawdown despite higher domestic production and exports.

Dry peas and lentils: In 2025, planted dry pea acreage is 10 percent higher and planted lentil acreage is 8 percent higher than in 2024. For the July 2024–June 2025 marketing year, imports of both dry peas and lentils declined 30 percent and total exports rose 8 percent, driven by higher lentil shipments (up 32 percent) which offset declining dry pea exports (down 10 percent). Average grower prices in 2024/25 for dry peas and lentils were 10 and 9 percent respectively below prices in the previous marketing year, comparing July through May periods only. Per capita availability fell by 18 percent from the previous year to 3.1 pounds in 2024, because of lower dry pea imports, which offset smaller gains in lentil availability.

Figure 1

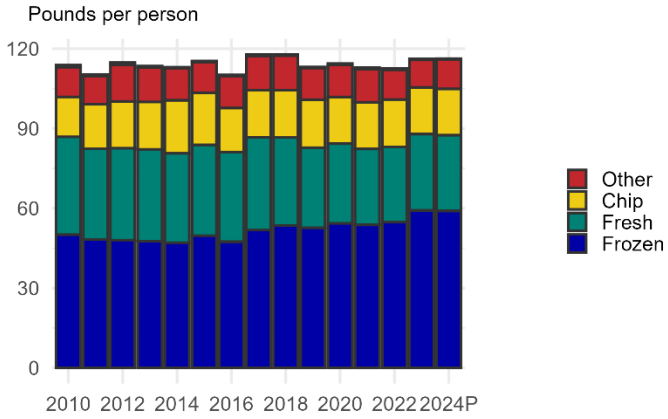
Potatoes in perspective: Annual industry snapshot, 2010–24

Annual potato production in top 13 States



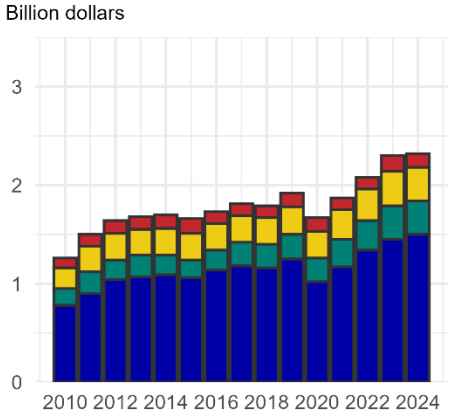
Cwt = 100 pounds.
Source: USDA, Economic Research Service using data from USDA, NASS.

U.S. per capita potato availability by category

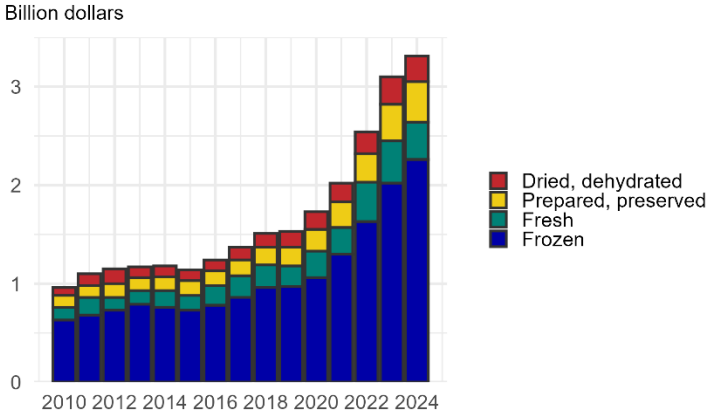


P = Preliminary.
Note: Other category includes dehydrated (excluding starch) and canned potatoes.
Source: USDA, Economic Research Service using data from U.S. Department of Commerce, Bureau of the Census and USDA, NASS.

U.S. potato export value by category

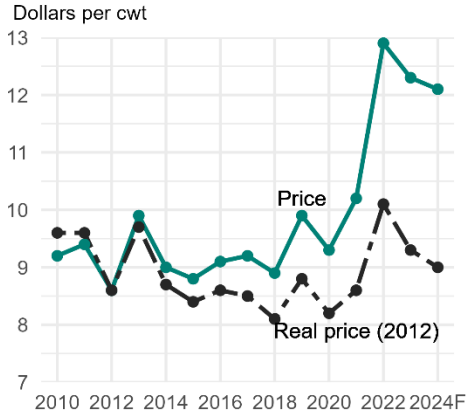


U.S. potato import value by category



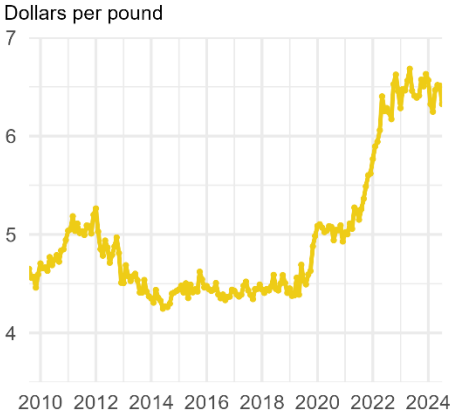
Source: USDA, Economic Research Service using data from U.S. Department of Commerce, Bureau of the Census.

U.S. season average potato price received



F = Forecast. Cwt = 100 pounds.
Source: USDA, Economic Research Service using data from USDA, NASS and U.S. Bureau of Economic Analysis.

Monthly average potato chip retail price



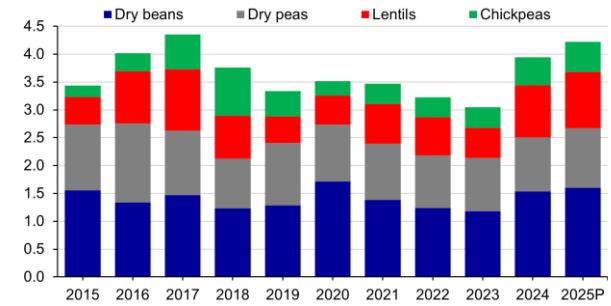
Source: USDA, Economic Research Service using data from U.S. Bureau of Labor Statistics.

Figure 2

Pulses in perspective: Calendar-year industry snapshot, 2015–2024 and 2025 for planted acres

U.S. pulse planted acres

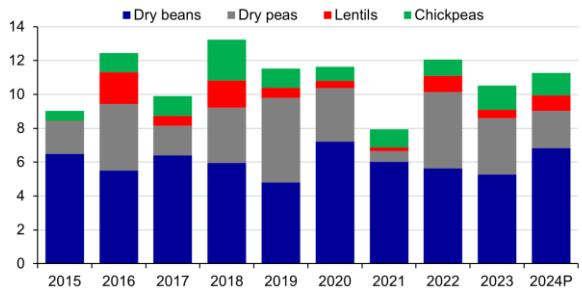
Acres, thousand



Note: P = preliminary. Dry pea estimates prior to 2019 include Austrian peas. Beginning in 2024, dry pea estimates for South Dakota were discontinued.
Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, *QuickStats*.

U.S. pulse per capita availability

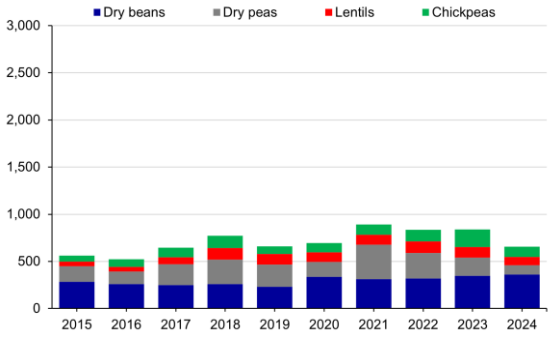
Pounds



Note: P = preliminary.
Source: USDA, Economic Research Service using data from U.S. Department of Commerce, Bureau of the Census and USDA, National Agricultural Statistics Service.

U.S. pulse imports

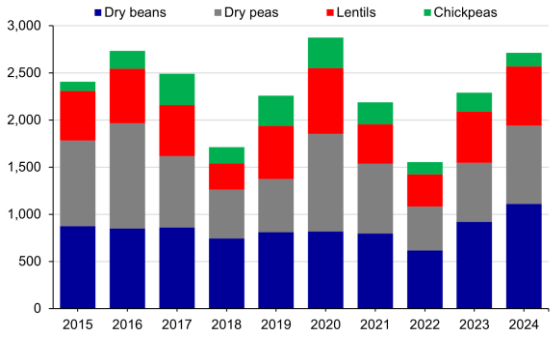
Million pounds



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

U.S. pulse exports

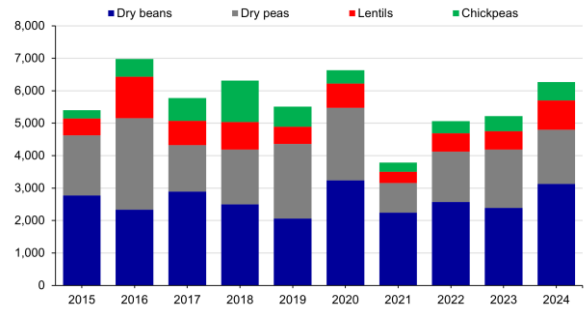
Million pounds



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

U.S. pulse production

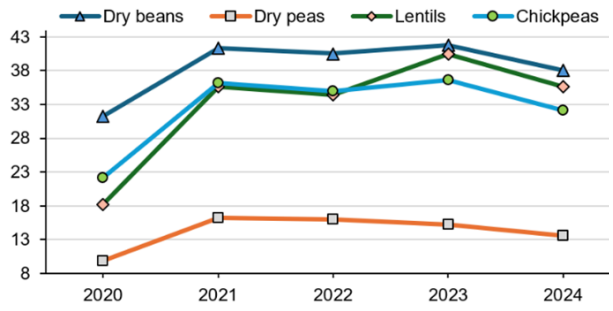
Million pounds



Note: Dry pea estimates prior to 2019 include Austrian peas. Beginning in 2024, dry pea estimates for South Dakota were discontinued.
Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, *QuickStats*.

U.S. pulse annual prices received

Dollars per cwt



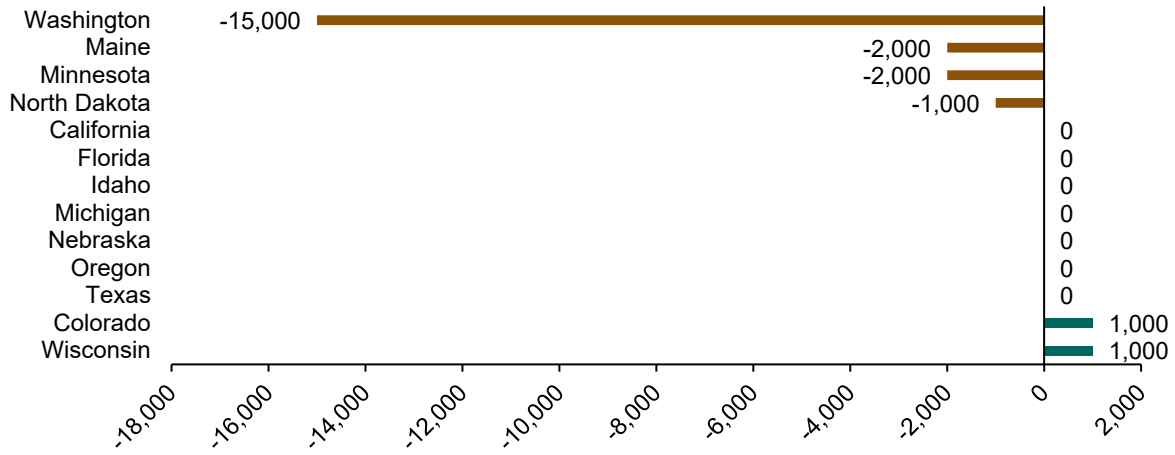
Cwt = 100 pounds.
Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, *QuickStats*.

Potatoes

Acreage Forecast Down Second Year in a Row

The USDA, National Agricultural Statistics Service's (NASS) June *Acreage* forecast for 2025 potato planted acres is 2 percent lower than last year. At 912,000 acres, the U.S. 2025 potato planted acreage forecast is an 18,000-acre (2 percent) reduction from 2024 and 54,000 acres (6 percent) lower than 2023. For the second year in a row, potato planted acreage is expected to decrease in Washington (down 15,000 acres), Minnesota (down 2,000 acres), and North Dakota (down 1,000 acres) (figure 3). Acreage in Maine is also expected lower, from 54,000 acres in 2024 to 52,000 acres in 2025. The 2025 planted acres forecast is unchanged year over year in 7 of the 13 NASS-surveyed States. Only Colorado and Wisconsin are expected to increase acreage slightly.

Figure 3
Year-to-year change in potato planted acres by State, 2024–25F

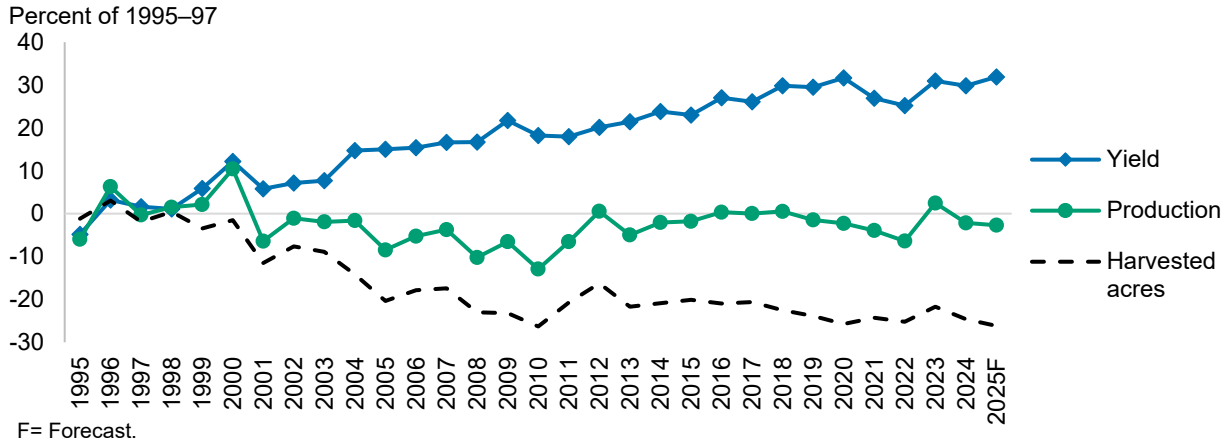


F = Forecast.
Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, *Acreage* (June 2025).

The Pacific Northwest (PNW) accounts for 55 percent of the 2025 potato acreage forecast. The forecast for this 3-State region is 503,000 planted acres, a 3-percent reduction from last year. The decline in PNW potato acreage is due to decreased acreage in Washington (down 9.4 percent); acreage in Idaho and Oregon is not expected to change relative to last year. Lower contract volumes from PNW potato processors partially explain the decline in acreage. While a decrease in PNW potato acreage was forecast in the *Vegetable and Pulses Outlook: April 2025*, unchanged planted acres in Idaho and Oregon indicate that potato growers opted to plant more uncontracted potatoes than usual.

If realized, 2025 potato planted acres would be the smallest on record in the 13 NASS-surveyed States since 1954.[1] However, the U.S. average yield in 2025 is expected to be more than double the average yield in the 1950s. In recent decades, a gradual reduction in potato harvested acres has largely been offset by an upward trend in average yield (figure 4). The 2025 USDA, NASS *Acreage* report estimates that 905,900 acres of the 912,000 planted acres will be harvested based on average abandonment rates. If this estimate is realized and yield is closer to trendline (461 hundredweight per acre), production would fall 1 percent year-over-year from 420.2 million hundredweight (cwt) in 2024 to 417.6 million cwt in 2025, despite the decrease in planted acreage. USDA, NASS will release its preliminary 2025 potato production volume in the November *Crop Production* report, which will include updated acreage estimates.

Figure 4
Increase in yield offsets decline in harvested acres for major producing States, 1995–2025F



F= Forecast.
Note: Major producing States include California, Colorado, Florida, Idaho, Maine, Michigan, Minnesota, Nebraska, North Dakota, Oregon, Texas, Washington, and Wisconsin. 2025 estimated production is calculated based on USDA, NASS 2025 harvest acres forecast and a yield of 461 hundredweight per acre.
Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service.

Taking Stock of the 2024/25 Potato Marketing Year

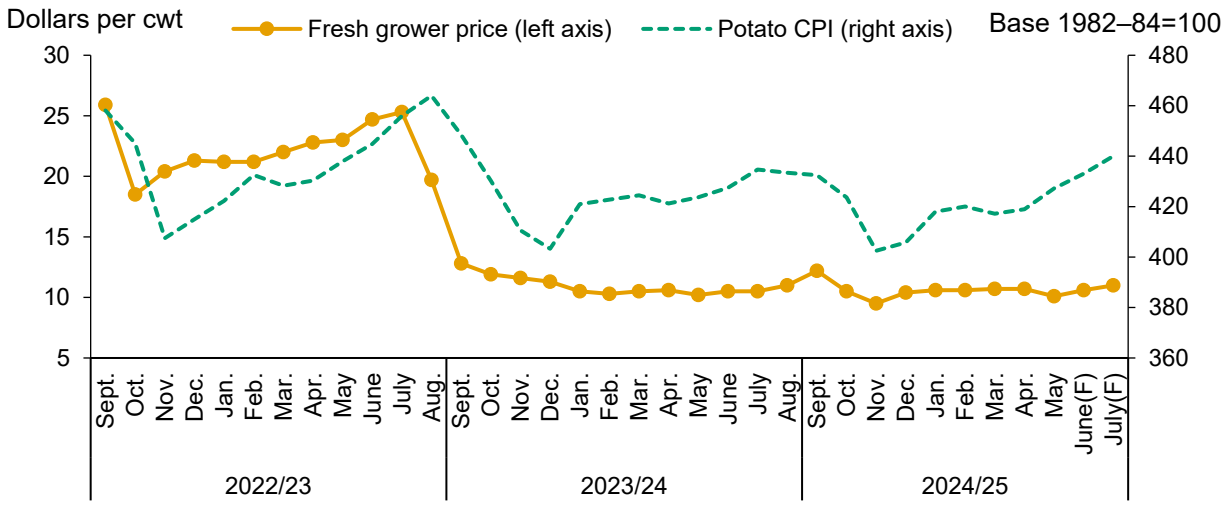
Potato stocks: On June 1, 2025, potato stocks were 8 percent lower compared to the same month last year but 3 percent higher than the previous 3-year average (2021–2023). Stocks represent the quantity of potatoes in storage, including processor holdings and most of the seed to plant the following year's crop. The stock decline was driven by a 19-percent year-over-year reduction in Idaho, which totaled 22 million cwt, accounting for 38 percent of June 2025 potato stock volume in the 13 NASS-surveyed States. Accumulated shrinkage and loss by June 1, 2025, represented 6 percent of market year 2024/25 (September–August) production (25.12 million cwt of 420.24 million cwt), which is a similar share to last season's crop during the same period.

[1] The current 13 USDA, NASS-surveyed States potato-producing States include California, Colorado, Florida, Idaho, Maine, Michigan, Minnesota, Nebraska, North Dakota, Oregon, Texas, Washington, and Wisconsin.

More than 60 percent of the U.S. potato crop is destined for the processing market each season. An estimated 184.3 million cwt of potatoes were used for processing by eight NASS surveyed States[2] in 2024/25 through May 31, with 80 percent of processing occurring in the PNW (excludes dehydrated products and starch). Processed potato volumes through May 31 were behind last season in the PNW (down 6 percent) and in the other 5 processing States surveyed (down 5 percent). Monthly reported processed volumes from the 8 reporting States for December 2024 through May 2025 have ranged from 16.7 to 19.3 million cwt, with the largest year-over-year percentage gap between the 2023/24 and 2024/25 season occurring in April 2025 (down 12 percent). Frozen potatoes in cold storage (mostly french fries) in May 2025 were up 1 percent from the same month last year, as U.S. frozen french fry export volume fell 12 percent.

Fresh monthly potato prices: Following a large fall harvest in 2023, fresh potato prices fell sharply below prices observed during the previous 16 months. USDA, NASS reported that monthly grower prices for fresh potatoes in 2024/25 remained low, ranging from $10.10 per cwt to $10.70 per cwt between January and May 2025 (figure 5). In the 2023/24 MY, fresh potato prices ranged from $10.20 to $10.60 per cwt during the same period. Based on weekly USDA, AMS free-on-board (FOB) shipping-point prices for potatoes, USDA, ERS expects USDA, NASS grower prices to increase slightly in June and July from May's average price. Fresh potato retail

Figure 5
Monthly fresh potato grower price and CPI in last 3 seasons



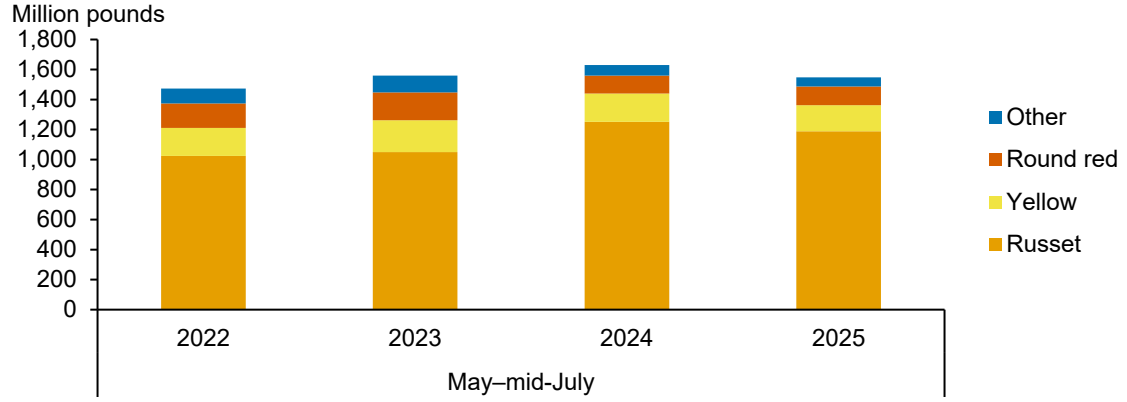
Cwt = Hundredweight. CPI = Consumer Price Index. F = Forecast.
Note: Potato marketing year starts in September and ends in August of the following year. USDA, ERS forecasts for June and July 2025 fresh grower prices and July 2025 potato CPI.
Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service and U.S. Department of Labor, Bureau of Labor Statistics.

[2] The 8 States reported by USDA, NASS (*Potato Stocks*) for potatoes used for processing include Colorado, Idaho, Maine, Minnesota, North Dakota, Oregon, Washington, and Wisconsin. Processing quantity represents potatoes used for processing regardless of the State in which the potatoes were produced.

prices, reflected by the Bureau of Labor Statistics (BLS) Consumer Price Index (CPI), also rose from May to June (up 1.4 percent). If fresh grower and retail price patterns follow previous marketing years, they are likely to increase slightly from July to August ahead of the fall harvest.

2025 summer potato shipments: Domestic fresh potato (table stock) shipment volumes from May–mid-July 2025 (weeks 19–28) lagged 5 percent behind last year but 1 percent ahead of the same period in 2023 (figure 6). During this period, the share of shipment volume by potato type was similar to last year, with Russet accounting for 77 percent followed by yellow (11 percent) and round red varieties (8 percent). Russet volume in 2025 was down 5 percent, yellow shipments were down 7 percent, and round reds were up 4 percent from last year. Almost all Russet shipments were storage potatoes from 2024. In contrast, about 70 percent of yellow and red potato shipments during the summer (May–mid-July) were harvested in 2025 (primarily from Florida and California).

Figure 6
Summertime fresh table stock potato shipments, 2022–25



Note: Domestic weekly shipment totals for weeks 19–28. Excludes potato seed and chipping potatoes.
Source: USDA, Economic Research Service based on data from the USDA, Agricultural Marketing Service, *Market News* movement data.

Processed potato product prices: The June 2025 producer price index (PPI) for frozen potato products was unchanged from a year earlier and 6 percent above the same month 2 years ago. Wholesale prices for potato chips and sticks (plain and flavored) have also stagnated, falling 1 percent below a year from April 2025 through June 2025. Chipping potato shipments (fresh potatoes for chip processing) were lower this year according to movement data from USDA, AMS *Market News*. Chipping potato shipment volumes from January through mid-July 2025 lagged 15 percent behind last year and 11 percent behind 2023 for the same period. By mid-July 2025, chipping potato shipments had largely transitioned from the 2024 storage crop to 2025 early-season potatoes.

Potato retail sales: Retail sales in calendar year (CY) 2024 for all potato products were 0.7 percent higher in value and 3.1 percent higher in volume (fresh-weight equivalent) compared to

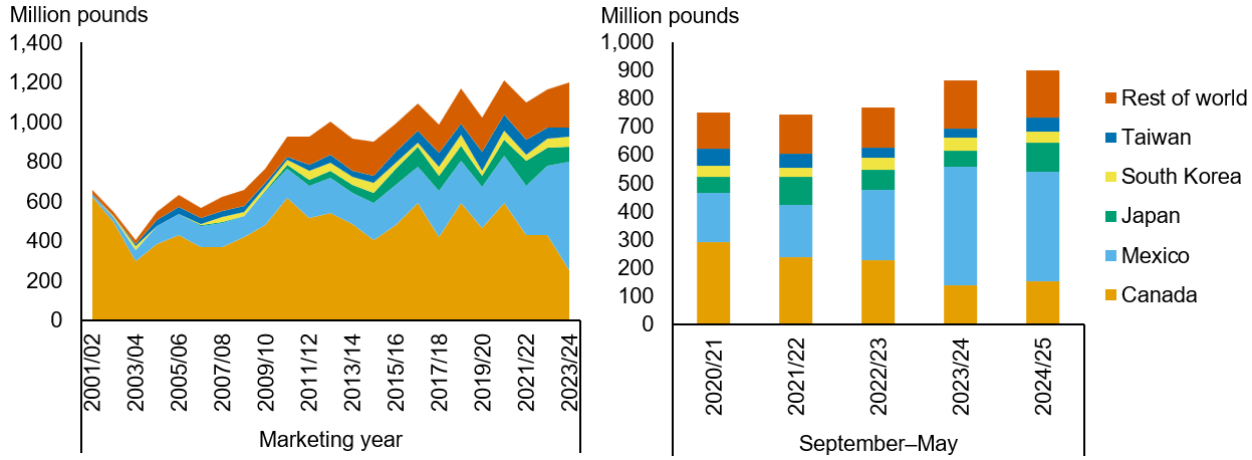
last year, according to a Potatoes USA retail sales report. In terms of grocery store potato sales, potato chips accounted for 48 percent ($8.8 billion) of total sales dollars in CY 2024, up 2 percent from last year. Fresh potato retail sales represented 22 percent of value ($4.1 billion) with the 5-pound consumer package size continuing to represent more than half of fresh potato sales volume (56 percent). In terms of fresh potato types, Russets remained the top fresh potato variety of choice with 64 percent of retail volume, followed by yellow (15 percent) and red varieties (11 percent) during the July–September 2024 quarter.

Potato Exports and Imports Vary by Category in MY 2024/25

Over the last decade, U.S. exports of potatoes and potato products represented 15 percent of total available supply (fresh-weight basis) each year. Frozen potato products represent more than half of this fresh-weight export volume, followed by dehydrated products (mostly flakes, flour, and starch), fresh potatoes, potato chips, and canned potato products. The following is a summary of U.S. potato and potato product trade by category in the first 9 months of the marketing year (September–May) (table A1):

Fresh exports on pace to set record high in 2024/25: U.S. fresh potato exports have grown in the past two decades, exceeding 900 million pounds each marketing season since 2010/11. Canada has long been the top trading partner for U.S. fresh potato exports, accounting for about 90 percent of volume in the early 2000s. However, in MY 2023/24, Mexico ranked number one in fresh potato export volume (excluding seed) for the first time, accounting for 546 million pounds of 1.2 billion pounds (46 percent) (figure 7). This increase followed regulatory changes the USDA announced in mid-2022 that expanded market access for U.S. fresh potato exports to Mexico. More than halfway through the 2024/25 marketing year (September–May), fresh exports to Mexico total 387 million pounds—8 percent lower than the same period last season but more than 90 percent above the previous 3-year average. During the same period, fresh exports are up year over year to Canada (11 percent) and Japan (36 percent). Because of phytosanitary restrictions, only U.S. fresh chipping potatoes (as opposed to table stock potatoes) are eligible for export to Japan. According to USDA, Foreign Agricultural Service, the United States is the sole foreign supplier of fresh chipping potatoes to Japan. Overall fresh export volume in 2024/25 is up 4 percent from last year with the increased volume to Japan, Taiwan, and Canada offsetting decreases to Mexico and South Korea.

Figure 7
U.S. fresh potato export growth in 21st century



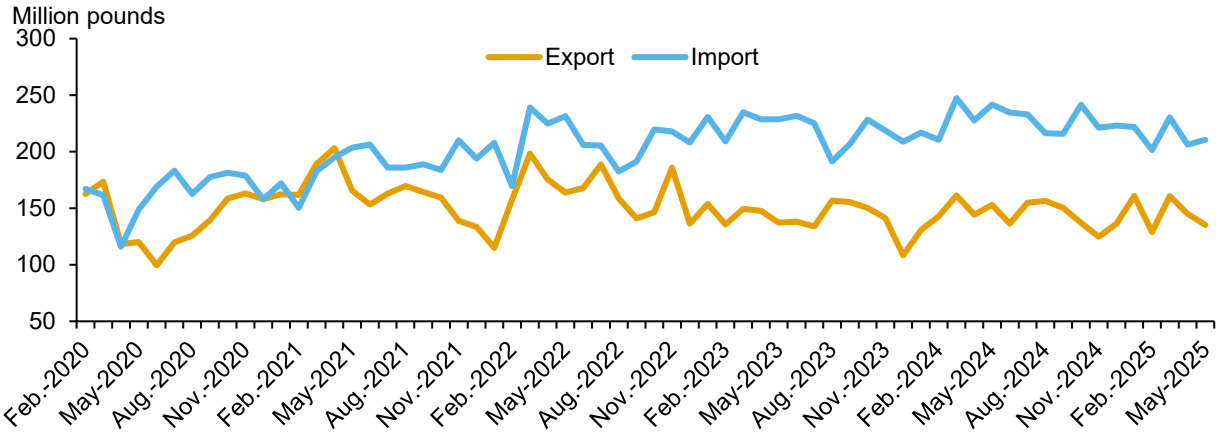
Note: Excludes fresh seed potatoes. Potato marketing year starts in September and ends in August of the following year. The chart on the left shows marketing year data from 2001/2002 through 2023/2024.
Source: USDA, Economic Research Service based on data from U.S. Department of Commerce, Bureau of the Census.

Frozen french fry export and import volumes in 2024/25 down: French fries are the top U.S. potato export in terms of value and volume. During the September 2024–May 2025 period, frozen french fry exports totaled $967 million by value (down 3 percent) and 1.28 billion pounds by volume (down 1 percent) year over year. This is the lowest September–May french fry export volume since MY 2010/11. Despite increased volume to several key trading partners in Asia, including Japan (up 6 percent), South Korea (up 8 percent), and Taiwan (up 8 percent), export volume was offset by double-digit declines to Mexico and the Philippines (down 10 and 39 percent, respectively) compared to the same period last season.

The United States was a net importer of frozen french fries during the last 5 marketing years (2019/20–2023/24), and this trend has continued in MY 2024/25. To date in MY (September–May) 2024/25, french fry import volume totaled 1.972 billion pounds, down 2 percent from last season's record high. Almost all import volume was from Canada (85 percent) or the European Union (12 percent). Imports from Canada were down 2 percent by volume and value. Imports from the European Union were down 10 percent by volume and value. May 2025 was the 9th month in MY 2024/25 and marked the 21st month in a row the United States was a net importer of frozen french fries by value and the 49th month in a row by volume (figure 8).

Figure 8

Monthly frozen french fry import and export volume



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

Like the United States, industry reports indicate some of Canada's french fry processors have also reduced contracted acreage in 2025. Canada's 2025 potato planted acres forecast is almost unchanged from last year (down 0.1 percent), according to Statistics Canada. Changes in 2025 planted acres varies by province with a decline in Manitoba partially offset by increases in Alberta and Prince Edward Island. To date in MY (September–May) 2024/25, Canada's frozen potato export volume is down less than 1 percent year over year. The United States is the primary export destination for Canada's frozen potato products (86 percent of volume), followed by Mexico (4 percent), Japan (3 percent), and Panama (1.5 percent) this season. Following a record Canadian potato crop in 2024 (128.2 million cwt), Canada's potato stock volume (as of June 1, 2025) was 17 percent larger than the same month last year. In terms of volume, the 2024 Canadian crop was equivalent to potato production in Washington and Oregon.

Dehydrated exports and starch imports: On average in the past decade, potato flakes accounted for about 75 percent of dehydrated potato product export value and volume (flakes, starch, flour, and other dried). Three-quarters through MY (September–May) 2024/25, potato flake export volume (product-weight) is down 20 percent from last season with declines to the top three destinations, Japan (down 23 percent), Mexico (down 41 percent), and Canada (down 27 percent). For imports, potato starch (excluding dextrin) has led the dehydrated potato product category with 71 percent value and 55 percent of product-weight volume in MY 2023/24. During the September–May 2024/25 period, potato starch import volume was up 11 percent from a year ago, with 83 percent of imports coming from the European Union.

Potato chip exports and imports: The United States exported 73.3 million pounds of potato chips valued at $163.9 million to date in MY (September–May) 2024/25—12 percent lower by

volume and 1 percent lower by value compared to MY 2023/24. Potato chip imports totaled 90.4 million pounds and valued $182 million during the same period, 17 percent higher by volume and 13 percent higher by value compared to last season. Potato chip import volume has risen in the past decade, primarily from Canada. In calendar year 2024, the United States became a net importer of potato chips for the first time, and the trend has continued in the first 5 months of 2025. The import share of annual domestic potato chip availability was about 8 percent in 2024, with domestic potato chip production accounting for the majority of available supply (92 percent).

Sizing Up This Year's Potato Crop

2025 potato crop progress by region: Potatoes are grown in all 50 States, but 90 percent of acreage is concentrated in 13 States, according to the 2022 Census of Agriculture. Potato production in these top-producing States can be discussed at a multi-State or sub-State regional level given the similarities in proximity (planting, harvesting, and production practices) as well as the market focus (e.g., frozen, chipping, and fresh-market potatoes). The following is a summary of crop progress for several potato-growing regions:

Western United States:

- The **Pacific Northwest** (PNW) (Washington, Idaho, and Oregon) is a major potato-producing region, accounting for about 60 percent of the total U.S. crop volume in the last 3 years. Near ideal weather in April and May allowed for planting progress and crop emergence in **Washington, Idaho, and Oregon** to trend ahead of the 5-year average according to weekly data from USDA, NASS. For the week ending July 27, 2025, 88, 77, and 63 percent of potato crops in Idaho, Oregon, and Washington were rated in good-to-excellent condition, respectively. Oregon conditions are above the 5-year average (67 percent). Both Idaho and Washington's good-to-excellent crop ratings were similar to the 5-year average (87 and 61 percent, respectively) with conditions in Washington improving steadily between mid-May and the end of June. If weather remains average throughout the remainder of the growing season, the earlier start to planting and lower demand for early-season varieties could contribute to larger yields for the 2025/26 crop. Potato harvest started in the PNW in late July and will continue through October.
- Potato production in **California** occurs throughout the State, from northernmost counties in the Klamath Basin to southernmost counties in the Imperial Valley. **Kern County** in central California represents almost half (41 percent) of the State's potato planted acreage, according to the 2022 Census of Agriculture. In 2025, total spring planted

potato acres in Kern County's *Spring Potato Acreage* report was 7,219 acres, similar to 2023 and 2024. Chipping potatoes accounted for the largest share of potato acreage (55 percent), followed by Yukon Gold (19 percent), red varieties (16 percent), and white varieties (10 percent). Fresh potato shipments from the Kern County area tend to peak during the summer. In June–mid-July 2025, shipment volumes were down for yellow potatoes (4 percent) and red potatoes (8 percent) compared to the same period last year according to USDA, AMS *Market News*.

- At the end of July 2025, potato crop conditions in **Colorado's San Luis Valley** (south/central Colorado) were rated 85 percent good-to-excellent, which is ahead of both last season and the 5-year average (77 and 68 percent, respectively). Warmer June weather allowed the potato crop to catch up following wet field conditions in early May that slowed planting.

Central United States:

- The **Red River Valley** (located along the North Dakota–Minnesota border) planting season was generally favorable. In **North Dakota**, 73 percent of acres were rated in good-to-excellent condition at the end of July, which is 20 percent above the 5-year average. The percentage of fields in bloom at the end of July (91 percent) was on par with the 5-year average (92 percent). **Minnesota** potato producers in the Red River Valley and across central Minnesota are faring better, with 96 percent of acres rated in good-to-excellent condition (5-year average is 85 percent) according to USDA, NASS.
- **Wisconsin**'s potato crop was in good condition for the week ending July 27 (95 percent good-to-excellent), which is 5 percent higher than the same time last season. Unlike last year's rainy start to the growing season, conditions are comparatively better, which could support higher yields in 2025. Harvest in Wisconsin was 7 percent complete at the end of July (5-year average is 6 percent). Similarly, agricultural extension sources indicate **Michigan**'s potato crop is also in good condition. Michigan potato planted acreage for 2025 forecast is unchanged from 2024. If good growing conditions continue through the remainder of the season, the 2025 Michigan potato crop could mark the fifth year in a row yield exceeds 400 cwt per acre.

Eastern United States:

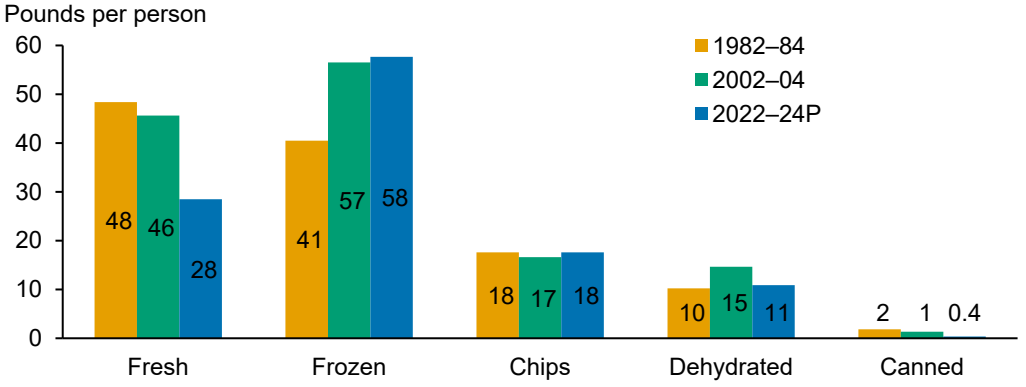
- If the 2025 USDA, NASS harvested acreage estimate in **Florida** is realized (16,700 acres), it would be 100 acres less than last year and the smallest in the State since 1916. Fresh potato shipment volumes from Florida, which tend to peak between March

and May, were up in 2025 (1 percent) compared to the same period last year. Shipment volumes for yellow and red varieties rose (up 3 and 10 percent, respectively) and round white variety shipments decreased (17 percent).

- Potato planting and emergence in **Maine** was slightly ahead of the 5-year average during June this year. By July 27, 2025, almost all potato fields had reached full bloom (95 percent). Potato growers in Maine are expected to reduce acreage in 2025 following a 2024 crop that was the largest in 20 years (18.6 million cwt). On June 1, 2025, potato stock volume in Maine was higher than the previous year (up 41 percent), representing 13 percent of 2024 production.

2024 preliminary potato per capita availability: The USDA, ERS preliminary per capita availability of potatoes for calendar year 2024 is 116.3 pounds, almost unchanged from 2023. In 2024, frozen potato products account for about 50 percent of potato per capita availability (on a fresh-weight basis), or 59 pounds per person. Fresh potato per capita availability in 2024 represents one-quarter of potato availability (28.5 pounds per person), followed by potato chips (17.4 pounds per person), dehydrated potatoes (11 pounds per person), and a small quantity of canned potatoes (0.3 pounds per person). Annual per capita availability of fresh potatoes remained above 40 pounds a person from the 1980s to the mid-2000s (figure 9). Over the last two decades however, per capita availability of fresh potatoes gradually declined from an average 46 pounds per person in 2002–2004 to 28 pounds per person in 2022–2024. During the same period, frozen potato per capita availability began to plateau, contributing to about a 20-pound reduction in total potato per capita availability (fresh-weight equivalent) compared to the early 2000s.

Figure 9
Twenty-year trends: Average annual potato per capita availability (fresh-weight) by category



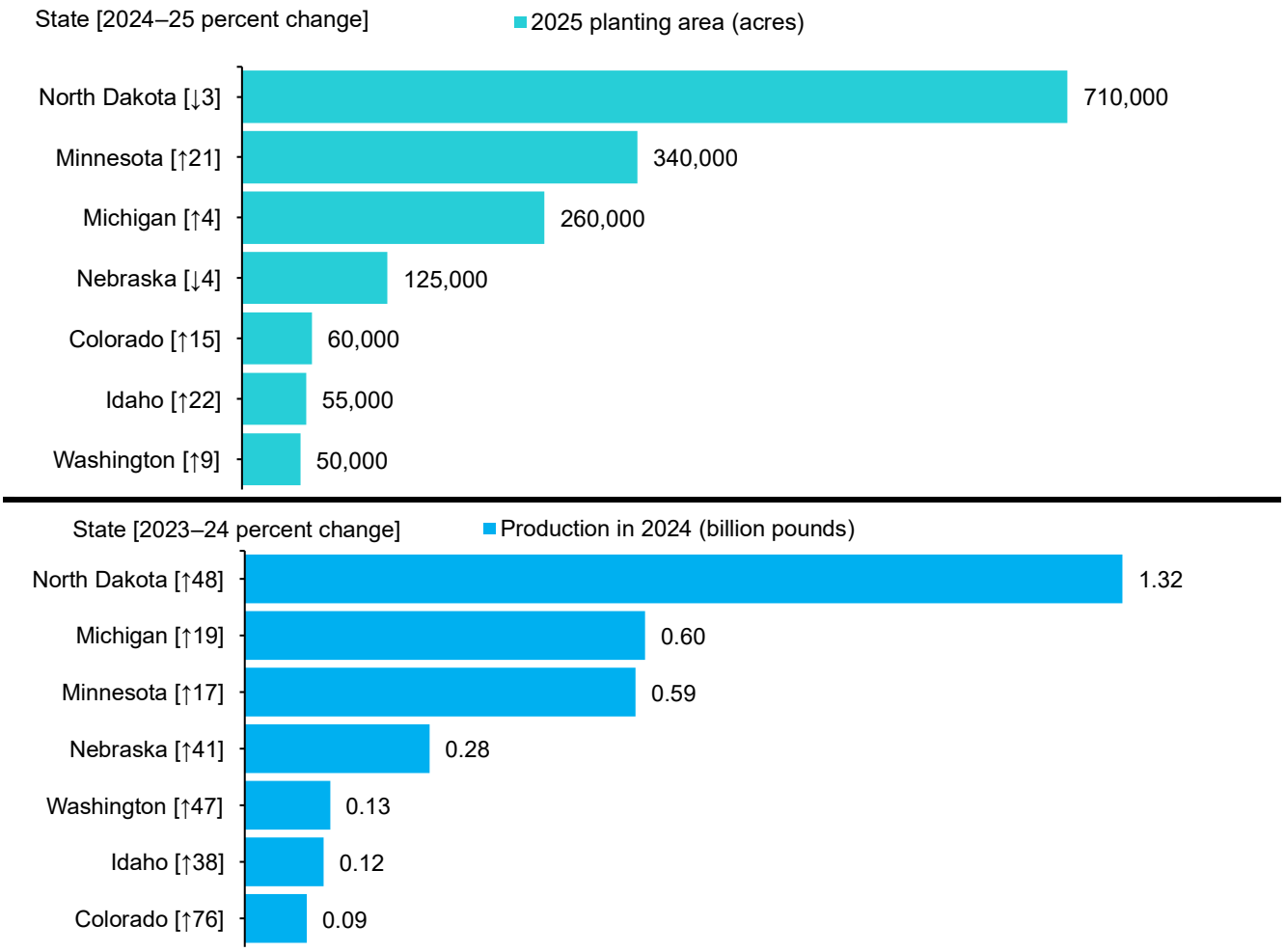
P = Preliminary.
Note: Bars represent a 3-year average per capita availability by category for the following calendar years: 1982–84, 2002–04, and 2022–24. The 2024 calendar year potato per capita availability is preliminary.
Source: USDA, Economic Research Service using data from U.S. Department of Commerce, Bureau of the Census and USDA, National Agricultural Statistics Service.

Dry Beans

Dry Bean Planted Area, Production, and Stocks

The 2024/25 dry bean marketing year began in September 2024 and ends in August 2025. North Dakota, Minnesota, and Michigan are expected to remain the top three dry bean States in terms of planted acreage for 2025, together accounting for 82 percent of total U.S. planted acreage reported in the USDA, NASS *Acreage* report released on June 30, 2025. In 2025, the total planted acreage for dry beans is expected to rise 4 percent from the previous year. Changes in dry bean planted acreage in 2025 vary by State and are shown alongside 2024 production levels in figure 10.

Figure 10
U.S. dry edible beans: Planted acreage by State in 2025, production in 2024, and percent changes from the previous year



Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, *Acreage*.

Projected Changes in State-Level Production Rankings in 2025:

- **North Dakota** is expected to remain the leading producing State by a wide margin, despite a 3-percent decline in plantings.
- **Minnesota**, with a 21-percent increase in acreage, might surpass Michigan (up 4 percent in planted acreage) in 2025 production if average yields remain consistent with recent years.
- **Idaho**'s 22-percent increase in acreage suggests it may produce more than Washington, despite Washington's 9-percent increase in planting.
- **Nebraska** is expected to remain the fourth-largest dry bean-producing State despite a 4-percent drop in planted acreage.
- **Colorado** may produce more dry beans than Idaho or Washington, depending on yields, following a 15-percent increase in planting (figure 10).

While 2025 planting data reflects emerging shifts in where dry beans are grown, 2024 production volumes show that 2024 output remained concentrated in certain classes, particularly among pinto and black beans. Pinto beans were overwhelmingly produced in North Dakota, accounting for 71 percent of total U.S. pinto bean output, while black bean production was more distributed, with Michigan (41 percent), Minnesota (30 percent), and North Dakota (24 percent) as the top 3-producing States. In 2024, dry bean production was 3.1 billion pounds, 31 percent higher than in the previous year. The top five bean classes in terms of production, which represented 88 percent of U.S. dry bean (excluding chickpea) production, were pinto beans (1,340 million pounds, up 56 percent from the previous year), black beans (920 million pounds, up by 37 percent), navy (pea) beans (263 million pounds, down 18 percent), small red beans (125 million pounds, up by 16 percent), and dark red kidney beans (113 million pounds, up by 21 percent).

These shifts in production shaped the amount of inventory carried into 2025. The Upper Great Plains Transportation Institute (UGPTI) at North Dakota State University reports stock levels for navy beans, pinto beans, black beans, and small red beans. In December 2024, pinto stocks were 10 percent higher than the previous year at 692 million pounds, and black bean stocks increased by 46 percent to 179 million pounds. These increases in dry bean stocks more than offset the decline in navy bean stocks that were 29 percent lower than the previous year at 87 million pounds and small red bean stocks were 6 percent lower at 27 million pounds.

Dry Bean Exports Decline from Previous Year Record Highs

The United States continues to be a net dry bean exporter, with marketing year export volume exceeding import volume for more than 30 years (1992/93–2023/24). Within the past 4 crop years (2020/21–2023/24), average net trade (exports minus imports) was approximately 518 million pounds per year. U.S. export and import volumes through May of 2025 are shown in table B1 and table B2.

Dry bean export volume from September 2024–May 2025 was 833 million pounds, 11 percent lower than the previous year for the same months. Table B1 indicates that this drop was driven by decreases in exports to Mexico (down 36 percent to 281 million pounds) and Canada (down 16 percent to 78 million pounds), which offset increases in exports to the Dominican Republic (up by 18 percent to 92 million pounds) and Costa Rica (up 32 percent to 54 million pounds).

Dry bean import volume from September 2024–May 2025 were 270 million pounds, a 2-percent decrease over the same months in 2023/24. The majority of dry bean imports originated in Canada (30 percent), India (15 percent), and Nicaragua (14 percent), representing 59 percent of dry bean imports in 2024/25 (table B2).

Dry Bean Prices

National marketing year to date (MYTD) grower prices reported by USDA, NASS show decreases in prices through May 2025. The simple average of monthly U.S. grower prices for dry beans (excluding chickpeas) was 16 percent below a year earlier, averaging $36.26 per hundredweight (cwt) for the first 9 months of the marketing year (September 2024–May 2025).

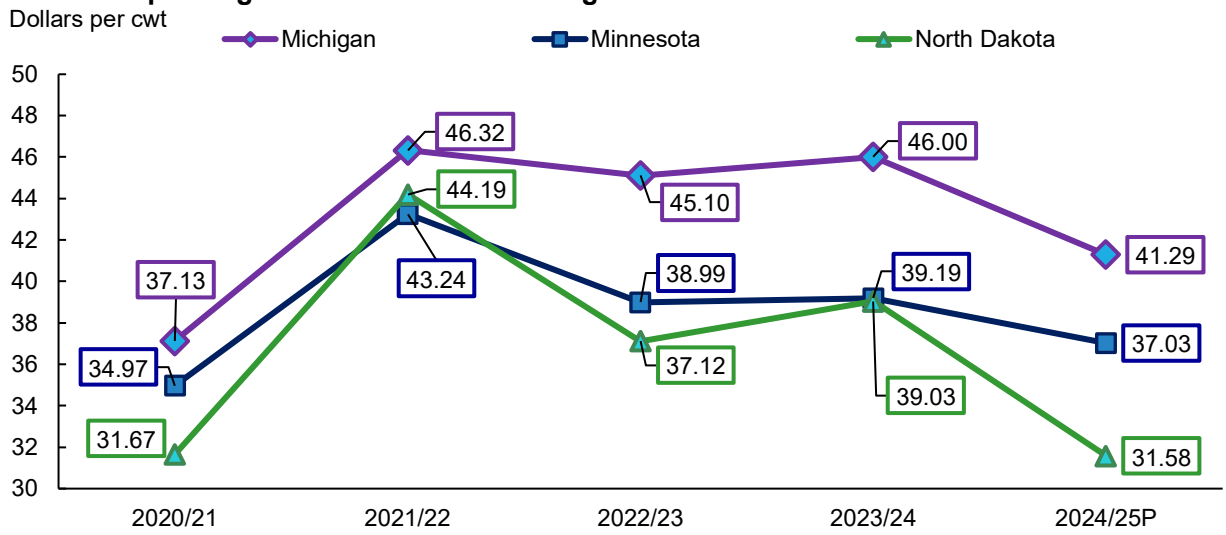
Figure 11 presents simple averages of monthly grower prices by State, showing price patterns across the past 5 marketing years. These shifts reflect the continued effects of expanded planted area and slower trade movement through reduced net trade—factors contributing to a likely buildup in availability. State-level simple averages of monthly grower prices reported by USDA, NASS indicate broader price adjustments across the top 3 producing States—Michigan, Minnesota, and North Dakota:

North Dakota: Price averages for the full MY rose from $31.67 in 2020/21 then peaked at $44.19 in 2021/22, before settling at $39.03 in 2023/24. The 2024/25 MYTD average has declined further to $31.58 per cwt, the lowest since 2020/21 and was tracking 20 percent below last year for the same months, and 28 percent below the peak in 2021/22 for the same September–May period.

Minnesota: Price averages for the full MY peaked at $43.24 in 2021/22 and $39.19 in 2023/24, about 9 percent below the peak. The 2024/25 MYTD average is down 7 percent from the previous year for the same September–May period.

Michigan: Price averages for the full MY ranged from $37.13 per cwt in 2020/21 to $46.32 in 2021/22, before averaging $46.00 in 2023/24. The 2024/25 MYTD average is 9 percent below last year for the same September–May period.

Figure 11
U.S. dry bean grower marketing year (September–August) prices continue decline in 2024/25 MYTD after peaking in 2021/22 across leading States



P = The prices for 2024/25 is a partial marketing year to date average from September 2024–May 2025.
Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, *QuickStats*.

Dry Bean Per Capita Availability

Preliminary estimates indicate that per capita availability of dry beans (excluding chickpeas) increased by 30 percent from 2023 to 2024 to 6.8 pounds per person. In comparison, the previous 3-year average (2021–23) is 5.6 pounds. About 80 percent of the total 2024 bean availability came from three major bean classes—pinto (48 percent), black (28 percent), and kidney (4 percent) with gains largely driven by changes in their availability:

Pinto beans: Up 47 percent, driven by a 56 percent rise in production and 7 percent gain in calendar-year imports, offset a 25-percent increase in calendar-year exports.

Black beans: Up 35-percent due to a 37-percent rise in production and increased calendar-year imports (up by 19 percent), alongside higher stocks (up 11 percent) despite a 32-percent rise in calendar-year exports.

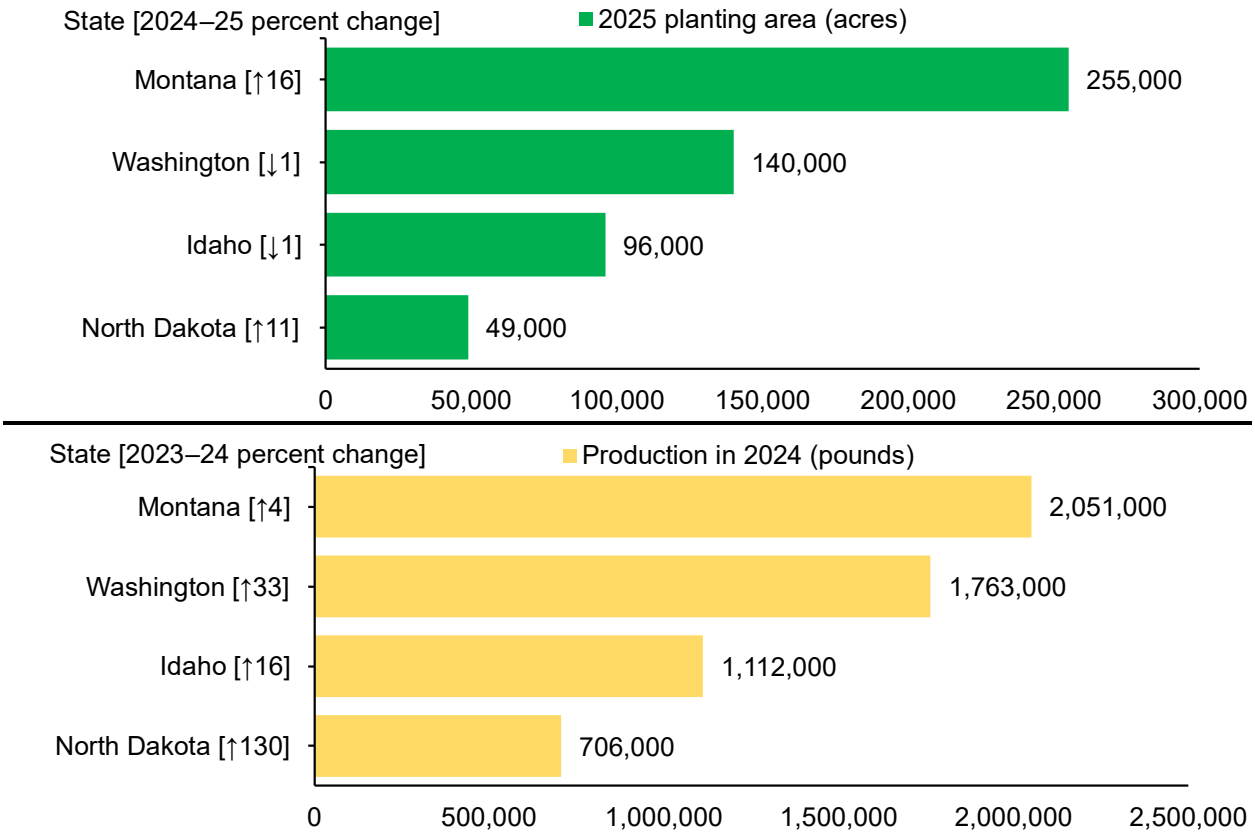
Kidney beans: Up 41 percent, reflecting production gains (16-percent) higher calendar-year imports (up by 15 percent), offsetting an 11-percent rise in calendar-year exports.

Chickpeas

Chickpea Planted Area, Production, and Stocks

The 2024/25 chickpea marketing year, like dry beans, began in September 2024 and ends in August 2025. Planted area for chickpeas in 2025 is expected to rise by 8 percent from 2024. This increase is driven by gains in Montana, where chickpea plantings were up by 16 percent to 255,000 acres, and in North Dakota, which is up 11 percent to 49,000 acres. These gains overshadow slight 1-percent declines in both Washington and Idaho with 140,000 planted acres and 96,000 planted acres, respectively (figure 12).

Figure 12
U.S. chickpeas: Increases in planted acres in 2025 from the previous year and no expected State production ranking changes expected in 2025



Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, *Acreage*.

This increase in intended chickpea planted acres in 2025 is driven by an increase in large chickpea planting by 12 percent at 406,000 acres in 2025, which offset a 3-percent decline in small chickpea planting at 134,000 acres. Despite larger production and stocks in 2024, yield reductions (down 12 percent) in 2024 may have encouraged growers to increase planting in 2025. In June 2024, chickpea stocks, reported by USDA, NASS, were down 7 percent year-

over-year but rebounded in the following months. By December 2024, stocks increased by 15 percent year-over-year. That upward trend continued into June 2025, as chickpea stocks rose further by 36 percent year-over-year, marking the first June increase reported since 2020. In 2024, chickpea production was up 21 percent from the previous year. U.S. large chickpea production was approximately 397 million pounds (up 20 percent), and small chickpea production was approximately 167 million pounds (up 24 percent).

Chickpea Trade

The United States continues to be a net chickpea exporter, with marketing year export volume exceeding import volume in 64 percent of marketing years (1991/92–2023/24). On average, exports exceeded imports by approximately 43 million pounds during that 33-year period. However, within the past 5 marketing years (2019/20–2023/24), average net exports increased to approximately 90 million pounds, despite the U.S. being a net chickpea importer in 2022/23.

Chickpea export volume from September 2024–May 2025 are 0.4 percent below the previous marketing year-to-date. Although chickpea exports to Canada declined by 35 percent to 39 million pounds, increased exports to Spain (up by 36 percent) with 38 million pounds and Pakistan (up by 120 percent) with 19 million pounds slightly offset that decline (table B3).

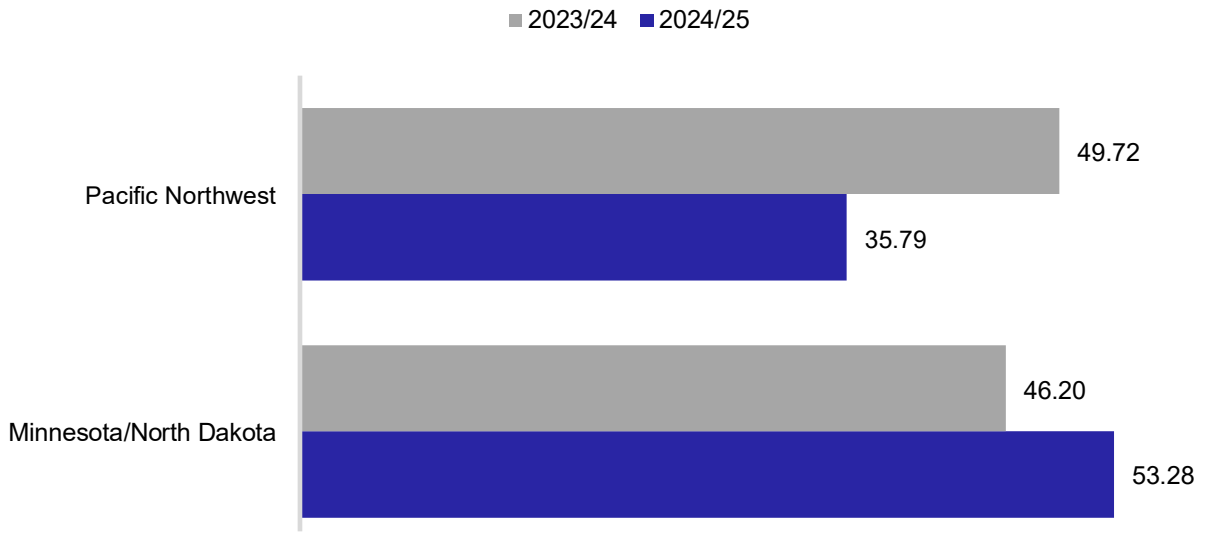
Chickpea import volume from September 2024–May 2025 have decreased by 37 percent with 63 million pounds over the same months the previous year. The majority of chickpea imports originated from Canada (18 percent), Mexico (26 percent), and India (23 percent), representing 68 percent of chickpea imports in 2024/25. The decline is largely due to reduced imports from Canada (down 65 percent, from 33 million to 12 million pounds) and Mexico (down 48 percent, from 32 million to 17 million pounds) from the same months the previous year (table B4).

Chickpea Prices

National monthly YTD grower prices received from USDA, NASS. The U.S. aggregate grower price (unweighted) for all chickpea classes averaged 16 percent below a year earlier, with an average monthly price of $30.50 per cwt during the first 9 months of the marketing year (September 2024–May 2025). Small and large chickpea average prices (unweighted) for this same period were down 23 percent ($25.96 per cwt) and down 10 percent ($33.39 per cwt) from the previous marketing year to date, respectively. While chickpea prices are trending down, acreage still expanded—likely influenced by rotational needs and efforts to recover from prior yield losses. These kinds of planting responses, which can outweigh market expectations, are not unusual in pulse markets where agronomic or logistical factors may play a significant role.

Regional monthly YTD grower prices by class from USDA, AMS. Figure 13 illustrates marketing year average grower prices for chickpeas by region during the September–June 2023/24 and 2024/25 marketing years. Chickpea growers in the Minnesota/North Dakota region received $53.28 per cwt in 2024/25, 49 percent more than the $35.79 growers received for chickpeas in the Pacific Northwest region. In 2023/24, Pacific Northwest chickpeas averaged $49.72 per cwt, which was 8 percent higher than the $46.20 per cwt received by growers in Minnesota/North Dakota region during the same time period.

Figure 13
Regional chickpea grower prices increase in 2024/25 YTD in Minnesota/North Dakota but decline in Pacific Northwest from the previous year
Dollars per cwt



Source: USDA, Economic Research Service using data from USDA, Agricultural Marketing Service, *Weekly Bean, Pea, and Lentil Market Review*.

Chickpea Per Capita Availability

The calendar year 2024 chickpea preliminary per capita availability of 1.3 pounds declined by 9 percent from the previous year. However, compared to the previous 3-year average, availability increased 14 percent. The year-over-year decline in 2024 was primarily driven by:

Lower imports: Calendar-year imports declined by 41 percent, limiting total supply.

Reduced stocks: December 2023 stocks fell 17 percent from the previous year, further tightening availability.

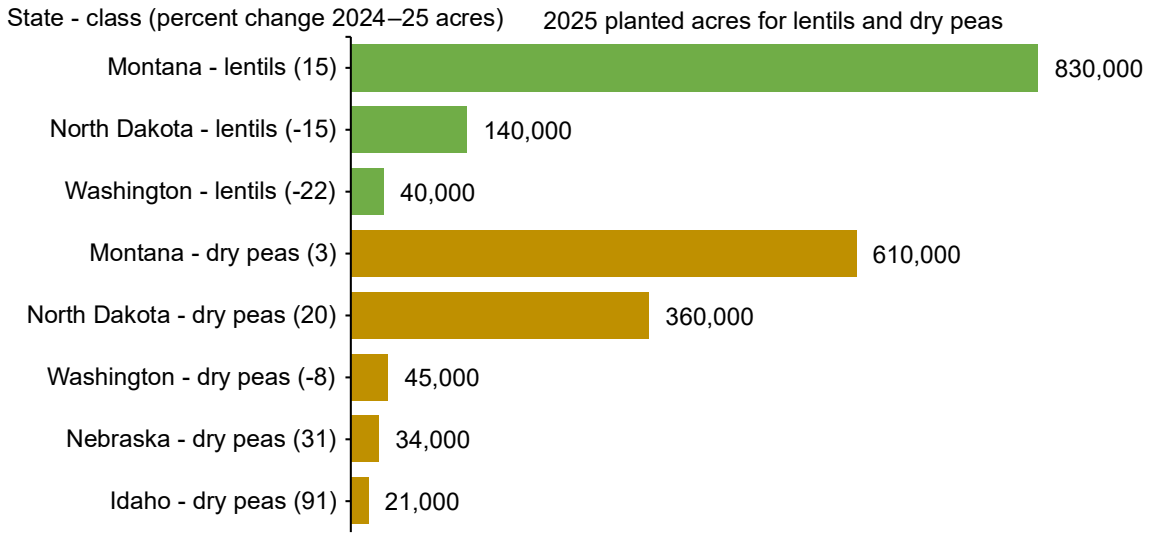
Production and trade shifts not enough to offset supply losses: Chickpea production rose 21 percent, with all 4 surveyed States—Montana, North Dakota, Washington, and Idaho—reporting year-over-year increases. Calendar-year exports declined 27 percent, reducing demand-side pressure. Yet these factors were not enough to offset the combined sharp drop in imports and stocks.

Dry Peas and Lentils

Dry Pea and Lentil Planted Area, Production, and Stocks

The 2024/25 dry pea and lentil marketing year began in July 2024 and ended in June 2025. The USDA, NASS *Acreage* report released on June 30, 2025, reported that planted acreage for dry peas increased by 10 percent. Increases in planted acreage in North Dakota (up 20 percent), Montana (up 3 percent), Idaho (up 91 percent), and Nebraska (up 31 percent), offsetting an 8-percent decrease in acreage in Washington (figure 14). Similarly, lentil area planted increased 8 percent across 3 surveyed States. Montana alone represents 82 percent of the total surveyed lentil planted acres in 2025, with the remainder in North Dakota (14 percent) and Washington (4 percent). Lentil acreage increases in Montana (up by 15 percent) offset declines in the other 2 surveyed States with North Dakota down 15 percent and Washington down 22 percent from the previous year (figure 14).

Figure 14
U.S. dry pea and lentil: Overall increases in planted acres in 2025 from the previous year amid acreage declines in North Dakota and Washington lentils and Washington dry peas



Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, *Acreage*.

In 2024, dry pea production declined 7 percent from the previous year, with overall average yields declining by 8 percent from 1,924 pounds per acre to 1,775 pounds per acre. Increasing dry pea production in North Dakota at 705 million pounds (up by 21 percent) was not enough to offset declines in the other 4 surveyed States: Montana produced 815 million pounds (down by 18 percent), Washington produced 89 million pounds (down 27 percent), Nebraska produced 38 million pounds (down by 16 percent), and Idaho produced 21 million pounds (down 27 percent). Lentil production in 2024 increased by 59 percent from the previous year despite overall

average yields declining by 8 percent from 1,089 pounds per acre to 1,002 pounds per acre from 2023–24. Lentil production increased from the previous year in Montana at 621 million pounds (up by 54 percent), North Dakota at 235 million pounds (up by 120 percent), and Washington at 49 million pounds (up 25 percent).

On June 30, 2025, USDA, NASS reported updated stocks for June 1, 2025, indicating an increase in dry pea stocks of 28 percent from the previous June from 257 million pounds to 329 million pounds. Lentil stocks in June 2025 increased 90 percent from 85 million pounds to 161 million pounds from the previous year.

Dry Pea and Lentil Trade

The United States is a net dry pea and lentil exporter with marketing year export volume exceeding import volume for over 30 years (1990/91–2023/24).

Dry pea exports from July 2024–May 2025 are 10 percent below the previous marketing year-to-date (table B5). Exports to Canada (down 61 percent) with 91 million pounds, China (down 23 percent) with 110 million pounds, and the Democratic Republic of the Congo (down 84 percent) with 5 million pounds. Those decreases offset increasing dry pea exports to Bangladesh (represented within the “Other countries” category of the table) jumped from no dry pea export volume in the past 3 years to 108 million pounds in MY 2024/25, ranking the second-largest dry pea export destination thus far after China, with 110 million pounds.

Lentil exports from July 2024–May 2025 are 32 percent above the previous marketing year-to-date. Increased exports destined for Canada (up 29 percent) with 256 million pounds, India (up 130 percent) with 119 million pounds, and China (up 163 percent) with 25 million pounds have offset reduced exports to Mexico (down 21 percent) with 36 million pounds and Peru (down 23 percent) with 20 million pounds (table B5).

Dry pea imports from July 2024–May 2025 have decreased by 37 percent with 78 million pounds over the same months the previous year. The majority of dry pea imports originated from Canada (46 percent) and Russia (31 percent) representing 77 percent of dry pea imports in 2024/25. The decline is largely due to reduced imports from Canada (down 42 percent, from 62 million pounds to 36 million pounds) and Russia (down 47 percent, from 46 million pounds to 24 million pounds) from the previous year (table B6).

Lentil imports from July 2024–May 2025 are 76 million pounds, 22 percent lower than imports during the same months the previous year. In 2024/25, the majority of lentil imports originated from Canada (76 percent) and India (13 percent) representing 89 percent of lentil imports. The

decline is largely due to reduced imports from Canada (down 26 percent, from 79 million pounds to 58 million pounds) from the previous year (table B6).

Dry Pea and Lentil Prices

National monthly grower prices received from USDA, NASS. The U.S. aggregate grower price (unweighted) for dry peas averaged 10 percent below a year earlier, with an average monthly price of $13.65 per cwt during the first 9 months of the marketing year (July 2024–May 2025). Lentil average prices (unweighted) for this same period are $36.74 per cwt—9 percent below the previous marketing year to date.

Regional monthly YTD grower prices by class from USDA, AMS. Pacific Northwest (PNW) lentils in the July–June 2024/25 marketing year averaged $35.25 per cwt a premium (6 percent) over lentils in the Minnesota/North Dakota regions with prices averaging $33.16 per cwt. Similarly for peas, PNW averaged $14.29 per cwt—a slight (1 percent) premium over Minnesota/North Dakota peas.

While the PNW currently holds a price premium for both lentils and peas in 2024/25, this pattern was not consistent last marketing year. In 2023/24, Minnesota/North Dakota lentil prices were actually higher, while the pea premium in the PNW was slightly larger than it is now. Looking back further, the regional spread has varied year to year, particularly for lentils, with the premium shifting between regions. A full table of average prices and year-over-year changes from 2020/21–2024/25 is available in table B7.

Dry Pea and Lentil Per Capita Availability

Preliminary estimates indicate that in 2024 per capita availability of dry peas and lentils declined by 18 percent from the previous year, falling from 3.8 to 3.1 pounds. The previous 3-year average for dry peas and lentils was 3.4 pounds. Although lentil availability increased, the larger decline in dry peas more than offset those gains, resulting in an overall decrease.

Dry pea availability fell from 3.3 to 2.2 pounds per person in 2024 from the previous year, largely because of a 7-percent decline in production and a 49-percent decline in calendar-year imports. The decline was compounded by a 33-percent increase in calendar-year exports, which placed additional downward pressure on dry pea availability.

Lentil availability rose from 0.5 to 0.9 pounds in 2024 from the previous year, supported by a 59-percent increase in production. However, gains were partially offset by a 20-percent decline in imports, a 28-percent reduction in stocks, and a 15-percent increase in calendar-year exports.

Improving Access to Market Intelligence: A Research Index for Vegetables and Pulses

In July 2025, USDA, Economic Research Service launched a curated web page to improve public access to over 20 years of vegetable and pulse market research. The web page indexes a wide range of Outlook series content—including focused features known as special articles, commodity highlights, and select standalone reports. Entries are organized into a searchable, topic-based format, with direct hyperlinks to each report. The curated entries include both "commodity highlights" and "special articles"—longstanding terms for focused Outlook features of varying length and placement. In reports before 2012, commodity highlights often appeared mid-report, while for reports after 2012, special articles were typically appended at the end.

Tracing the Development of a Public-Facing Research Tool

This resource builds on background work using USDA, ERS materials and archived Outlook reports available on external repositories, such as Cornell's Mann Library, and the USDA, National Agricultural Library. USDA, ERS later reorganized and extended the content—incorporating older materials to better reflect the full historical record. Although Outlook reports have long been archived, some reports were difficult to access because they were stored across multiple repositories and changing series titles, which limited search functionality. For example, Outlook series appeared under various titles, including *The Vegetable Situation* (the earliest series, located through the National Agricultural Library), *Vegetable and Melon* Outlook, and the current *Vegetables and Pulses Outlook*. Recognizing the value of this content, USDA, ERS created the index to make the analysis more accessible. While internal records span from 1937–2024, the public-facing index covers 2001–24, helping stakeholders easily navigate USDA, ERS market intelligence.

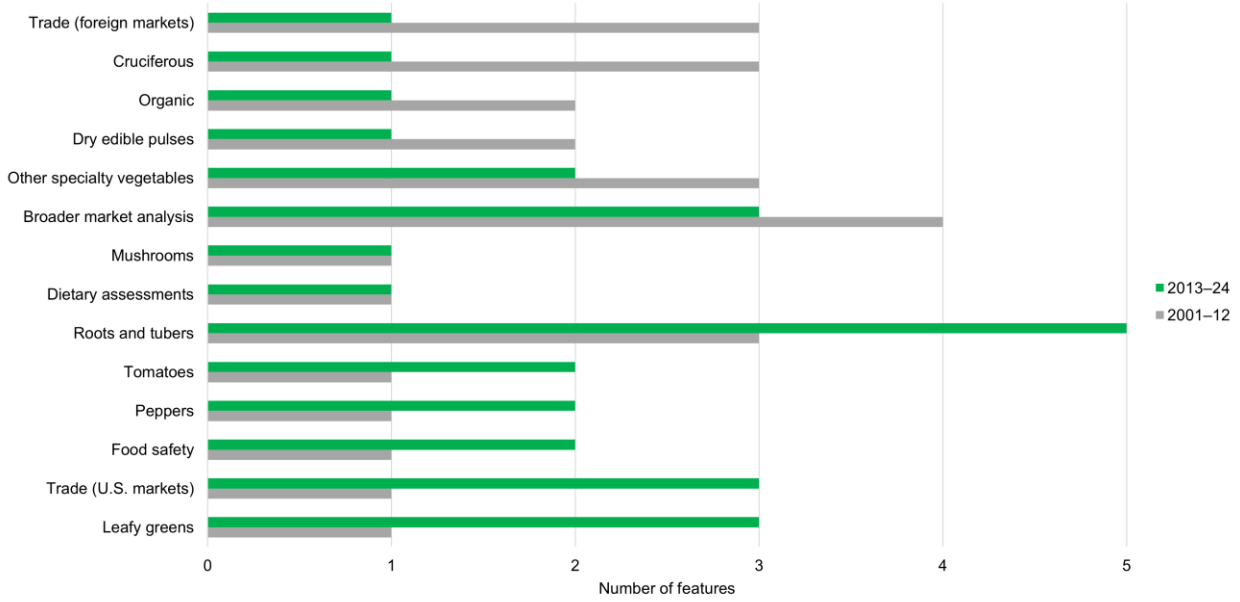
Topic-Based Web Page Enhances Access for Diverse Users

The web page organizes USDA, ERS research by topic to support diverse stakeholder needs. Each entry includes the publication title, date, and direct hyperlinks to the relevant page. Before this curated web page, locating content often required manually sifting through several years of Outlook reports—especially when commodity highlights and special articles appeared mid-report or at the end of longer Outlook reports—and no streamlined, consistent, topic-based reference tool existed. The web page currently includes 55 reports across 14 content areas, spanning 2001–24. The collection covers diverse topics—with reports after 2012 emphasizing roots and tubers, U.S. market trade, tomatoes, leafy greens, and peppers. While overall trade coverage remained steady across both periods, reports after 2012 focused more on U.S.

markets than foreign markets (figure SA-1). Outlook team members will continue to curate the index to highlight key USDA, ERS research.

Figure SA-1.

Topic coverage shifts over time, with U.S. trade and leafy greens gaining ground since 2013



Source: USDA, Economic Research Service data compiled from USDA, ERS *Vegetables and Pulses Special Articles* web page.

Looking Forward

The index offers a flexible framework that adapts to stakeholder demands and evolving priorities, while allowing for future additions. Research will continue to be added over time to maintain the index's relevance. If there is stakeholder interest in accessing older materials, the index could be expanded to include a broader historical range or refined into more specialized areas. Users can access the special articles web page through the Vegetables and Pulses topic page under the Crops section of the ERS website.

Special Thanks. USDA, ERS acknowledges the efforts of Gary Lucier for initiating the internal resource in 2023. Thanks also go to USDA 1890 National Scholar Miriam Bradley for expanding and refining the index, helping to develop the web page, and coauthoring this article.

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