Commodity Profile: Cauliflower

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Overview
The cauliflower, or “cabbage flower,” originated over 2,000 years ago in the Mediterranean and Asia Minor. Now produced and widely available in the United States, cauliflower belongs to the same family of cruciferous vegetables as cabbage, broccoli, brussels sprouts, kale, and bok choy. It is a cool season crop that thrives in a moist atmosphere. It is available year-round, although especially plentiful in the spring and fall. Cauliflower is a low-calorie vegetable, and one serving provides a good source of fiber, folacin, and potassium as well as a full day’s supply of vitamin C.

Demand
Per capita retail consumption of cauliflower has followed a generally increasing trend since 1960 (Figure 1). The most dynamic period of growth was between 1978 and 1986 when consumption grew from 0.7 of a pound to 2.0 pounds per capita. Since 1986, annual per capita consumption has varied between 1.3 and 2.1 pounds. In 2001, per capital consumption was 1.5 pounds.

In 2002, the United States was a net exporter of cauliflower. The U.S. exported $59.8 million in cauliflower and imported $4.7 million. Most of the trade was destined for NAFTA countries, with Canada being the largest trading partner and Mexico the third largest. Japan was second, accounting for $20.9 million (Table 1). Canada and Japan have been exchanging positions as the United States’ top trading partner since 1994, when exports to Japan increased by almost 75 percent in one year to overtake Canada as the top destination for U.S. cauliflower.

In 1993, the year before NAFTA was implemented, the United States was exporting $52.4 million in cauliflower worldwide, including $31.4 million (60 percent) to Canada and $415,000 (1 percent) to Mexico. By 2002, Canada was receiving $34.2 million and Mexico $2.25 million. In 2002, exports reached $59.8 million after peaking in 1995 at over $71.8 million. However, the ratio of exports destined for NAFTA partners in 2002 (61 percent) was relatively the same as before the free trade agreement was signed.
Tariff rates and policy changes resulting from NAFTA

The United States imposes three tariff lines on cauliflower imports, depending on the season and the size. From June 5 to October 15, the tariff is 2.5 percent ad valorem. Imports from October 16 through June 4 are charged a tariff of 10 percent if the cauliflower is not cut, sliced, or otherwise reduced in size and 14 percent if it is reduced in size. These tariffs refer to imports from nations with which the United States maintains normal trade relations. Nations without normal trade status with the United States face import tariffs ranging from 35 to 50 percent ad valorem.

Before the Canadian-U.S. Free Trade Agreement (CUSTA), the Canadian tariff on U.S. cauliflower was 2.21 cents per kilogram. Beginning in 1989, that tariff was reduced in equal increments over 10 years until it reached zero in 1998.

Mexico imposed a tariff of 10 percent on cauliflower shipments from the United States prior to NAFTA. The tariffs were either eliminated immediately, after five years or phased out over 10 years, depending on the type of cauliflower and the season. Beginning in 2003, no tariffs remained between Mexico and the United States.

U.S. tariffs on cauliflower from Canada ranged from 5.5 cents per kilogram to 12.5 cents per kilogram and depended on the type of cauliflower and the time of the year the cauliflower was shipped. All tariffs were phased out over 10 years and reached zero in 1998.

In 1993, Mexico faced the same U.S. tariffs that Canada had faced before CUSTA. Depending in the season and the type of cauliflower shipped, the tariffs were reduced immediately or phased out over five or 10 years.

Supply

In 2002, The United States produced 6.43 billion cwt of cauliflower on 55,300 acres, valued at $207.6 million. California was the largest producer, yielding 5.56 million cwt from 37,000 acres in 2002. The value of California production was $167.5 million, or over 80 percent of total U.S. production value. Other producers included Arizona, New York and Oregon, although Oregon’s production had declined to almost zero.

Of the cauliflower produced in the United States, 302,500 tons (94 percent) were marketed as fresh cauliflower. Overall, U.S. cauliflower acreage and production have decreased (Table 2). In 1992, 345,200 tons of cauliflower was harvested from 55,300 acres. Production peaked in 2000 but dropped in 2001 and 2002.


The price of U.S. cauliflower destined for processing also fluctuated during the same period. In 1992, one ton of cauliflower sold for $471. The price peaked in 1998 at $516 per ton, before plummeting to $392 the following year. In 2002, the price was $441 per ton.

The United States imported only $4.7 million worth of cauliflower in 2002, a 47 percent increase from 2001. Imports were up from $2.4 million in 1989, peaking in 1997 at $7.1 million.

Virtually all U.S. imports of cauliflower originate from the NAFTA partners. In 2001, Canada and Mexico were sole suppliers U.S. cauliflower imports. In 2002, Canada provided over $3 million (64 percent) of total U.S imports, while Mexico supplied over
$1.6 million. U.S. imports from Canada have increased since 1989. Shipments from Mexico have been relatively unchanged compared with the years before NAFTA, although value has varied from a high of over $1.9 million in 1990 to $385,000 in 2000.

Sources


Figures and tables

Table 1: U.S. Exports of Cauliflower, 1989-2002, in thousand $

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<tbody>
<tr>
<td>Canada</td>
<td>328</td>
<td>30,166</td>
<td>33,088</td>
<td>30,047</td>
<td>31,403</td>
<td>29,464</td>
<td>28,837</td>
<td>30,102</td>
<td>27,333</td>
<td>26,895</td>
<td>27,409</td>
<td>31,037</td>
<td>29,603</td>
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<td>Mexico</td>
<td>53</td>
<td>110</td>
<td>256</td>
<td>282</td>
<td>415</td>
<td>495</td>
<td>54</td>
<td>492</td>
<td>767</td>
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<td>1,620</td>
<td>1,232</td>
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<td>Total</td>
<td>17,898</td>
<td>37,242</td>
<td>45,954</td>
<td>47,340</td>
<td>52,373</td>
<td>65,552</td>
<td>71,826</td>
<td>71,070</td>
<td>56,356</td>
<td>57,310</td>
<td>58,575</td>
<td>50,732</td>
<td>52,692</td>
<td>59,821</td>
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(Source: U.S. Customs Service)
Table 2: U.S. and California Cauliflower Acreage, Production, and Value, 1992-2002

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<td>CA Acres Harvested</td>
<td>42,000</td>
<td>43,000</td>
<td>42,000</td>
<td>40,700</td>
<td>41,500</td>
<td>37,500</td>
<td>39,000</td>
<td>41,000</td>
<td>38,500</td>
<td>38,500</td>
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<td>US Acres Harvested</td>
<td>55,300</td>
<td>55,600</td>
<td>53,800</td>
<td>51,050</td>
<td>48,200</td>
<td>43,500</td>
<td>44,200</td>
<td>46,400</td>
<td>43,660</td>
<td>44,050</td>
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<td>CA Production (1,000 cwt)</td>
<td>5,460</td>
<td>5,375</td>
<td>5,460</td>
<td>5,088</td>
<td>5,790</td>
<td>5,850</td>
<td>6,355</td>
<td>6,930</td>
<td>5,968</td>
<td>5,550</td>
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<td>US Production (1,000 cwt)</td>
<td>6,904</td>
<td>6,719</td>
<td>7,039</td>
<td>6,528</td>
<td>7,354</td>
<td>6,889</td>
<td>6,977</td>
<td>7,970</td>
<td>7,018</td>
<td>6,428</td>
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<td>CA Production Value ($1,000)</td>
<td>155,001</td>
<td>159,245</td>
<td>154,594</td>
<td>171,045</td>
<td>203,499</td>
<td>181,829</td>
<td>182,650</td>
<td>173,725</td>
<td>211,087</td>
<td>167,504</td>
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<td>US Production Value ($1,000)</td>
<td>193,937</td>
<td>201,381</td>
<td>198,351</td>
<td>216,548</td>
<td>237,342</td>
<td>217,534</td>
<td>226,560</td>
<td>247,752</td>
<td>199,044</td>
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(Source: USDA National Agricultural Statistics Service)

Figure 1: U.S. Per Capita Cauliflower Consumption, 1960-2001
(Source: USDA Economic Research Service)