# Table of Contents

Executive Summary .................................................................................................................................................. 3
Overview of Florida’s Agricultural Exports ........................................................................................................ 4
  Leading Export Commodities .......................................................................................................................... 5
  Leading Export Partners .................................................................................................................................. 6
Major Partner Groups ......................................................................................................................................... 8
  South America .................................................................................................................................................. 10
  Latin America ................................................................................................................................................ 12
  The Caribbean .............................................................................................................................................. 14
  Asia .................................................................................................................................................................... 16
  Europe .............................................................................................................................................................. 19
Other Export Blocs ............................................................................................................................................. 20
Exports of Selected Florida Commodities ........................................................................................................ 22
  Orange Juice .................................................................................................................................................. 22
  Grapefruit Juice ............................................................................................................................................... 26
Fresh Fruits ......................................................................................................................................................... 27
  Fresh Grapefruit ............................................................................................................................................ 29
  Fresh Oranges ................................................................................................................................................ 31
Leading Fruit Exports ......................................................................................................................................... 33
  Fresh Strawberries ........................................................................................................................................ 33
  Fresh Watermelons ....................................................................................................................................... 35
  Fresh Blueberries ......................................................................................................................................... 36
  Fresh Melons ................................................................................................................................................ 38
Fresh Vegetables ................................................................................................................................................. 39
  Fresh Tomatoes ........................................................................................................................................... 40
  Fresh Peppers .............................................................................................................................................. 42
  Fresh Snap Beans ........................................................................................................................................ 43
  Fresh Brassicas ............................................................................................................................................. 44
Live Plants and Trees .......................................................................................................................................... 46
Cash Receipt Increases and Decreases ............................................................................................................... 47
  Biggest Export Increases and Decreases ....................................................................................................... 48
References

1- Fresh From Florida Retail Partner.
2- Commodity Situation Report Available.
3- Promoted During Fresh From Florida Trade Event, Fiscal Year 2017-18
Executive Summary

  - Supported 67,401 jobs
  - Generated indirect taxes of $376 million
  - Total economic impacts were $6.94 billion
- Export value has increased 31.4% since 2008
- Florida ranked 3rd among US states in vegetable exports and 4th in fruit exports
- Florida exported agricultural products to 164 countries and territories in 2017

- The top 10 destinations accounted for 54.6% of exports, down from 54.8% in 2016.
  1. Canada 18.5%
  2. Mexico 6.2%
  3. Dominican Republic 5.3%
  4. Bahamas 5.1%
  5. Panama 4.0%
  6. Netherlands 3.5%
  7. Colombia 3.4%
  8. Trinidad and Tobago 3.0%
  9. Guatemala 2.8%
  10. Costa Rica 2.6%

- The largest export increases from 2013 to 2017 (markets over $50 million)
  1. Mexico 76%
  2. Cayman Islands 74%
  3. Aruba 59%
  4. Guatemala 51%
  5. Chile 47%

- The largest export decreases from 2013 to 2017 (markets over $50 million)
  1. Netherlands -43%
  2. Canada -22%
  3. Trinidad and Tobago -5%
  4. Honduras -3%

- The value of export destinations by trading blocs ($ millions)
  1. Caribbean $1,175
  2. North America $998
  3. Central America $562
  4. South America $442
  5. European Union $374
Overview of Florida’s Agricultural Exports

Florida agricultural exports rose 4.4% in 2017, totaling $4.04 billion. A positive sign after seeing declines in 2015 and 2016. Since 2008, exports have increased 31.4% and over the past decade have grown at an average annual rate of 2.8%. Growth has remained relatively flat since 2011, growing at an average annual rate of .27%.

Overall, exports have increased in six of the past eight years and seven of the past ten. In five of the past six years exports have exceeded $4 billion. Florida’s $4.04 billion agricultural output in 2017 was exceeded by only six other US states.

Florida annually exports 24 different agricultural export commodities in significant amounts. Of those major commodities 14 showed increases and 10 recorded decreases in 2017. Tobacco, beverages decreased 18% and 9%, respectively.
Leading Export Commodities

Meats, prepared fruits and vegetables, beverages and fish top the list of Florida’s leading export commodities. While these categories remain largely unchanged since 2014, exports of dairy products and sugars each rose 56% in 2017.

Commodities are shipped out of Florida year-round with fall being the busiest season. Trade ebbs during the summer before picking up in the fall. September had the least activity and December had the most. The range between the two months is 38.8%.
Leading Export Partners

For the 18th consecutive year, Canada tops Florida’s list of agricultural export partners. Exports to our northerly neighbor represented 18.5% of all Florida agricultural exports in 2017, down from 18.7% in 2016. The top ten leading destinations accounted for 54.6% of exports compared to 52.4% in 2016. Except for the Netherlands and Canada, all these partners are south of Florida.

![Bar chart showing the top ten export partners in 2017 with Canada leading at $747 million, followed by Mexico, Dominican Republic, Bahamas, Panama, Netherlands, Colombia, Trinidad and Tobago, Guatemala, and Costa Rica.]

The next ten leading export partners are mostly in the Caribbean region or South America. Nine of them showed an increase in exports over 2016. These nations comprised 17.4% of exports.

![Bar chart showing the top ten export partners from November to December 2017 with Jamaica at $97 million, followed by Aruba, Chile, Honduras, United Arab Emirates, Cayman Islands, China, Brazil, Sint Maarten, and Barbados.]

Canada totaled $747 million of Florida agricultural exports in 2017, nearly triple that of Florida’s number two partner, Mexico. Canada is poised to maintain its status as Florida’s leading export partner for the foreseeable future. Canada is the leading destination for Florida’s fresh fruits and vegetables, including blueberries, oranges, grapefruit, tomatoes and watermelon.
Major Partner Groups

Florida has maintained a lengthy and lucrative export relationship with countries throughout the world. Trade with developed economies has long constituted a significant percentage of Florida’s agricultural export markets. These countries include Florida’s largest trading partners such as Canada, Japan, the Netherlands and the United Kingdom. While these partners have long provided a steady market for Florida products, changing regulations and shifting consumer preferences continue to exact a toll on these markets. Florida’s exports to developed economies represented 45.7% of all exports in 2008 and have since declined to 29.7% in 2017. Decreases in exports to Japan, Europe and Canada are a major reason.

During the same time, exports to developing economies have increased from 54.3% in 2008 to 70.3% in 2017. The developing economies include some of Florida’s fastest growing markets, including Mexico, Colombia and South Korea. Exports to these three countries rose from $140 million in 2008 to $431 million in 2017.
Meanwhile, exports to the least developed countries (Angola, Bangladesh, Haiti, among others) increased in 2017 after three straight years of decline. Since 2008, Florida exports to this bloc have decreased at an average annual rate of 1.8%. Combined, these approximately 40 countries represent 1.3% of Florida’s agricultural output.

Any increase in exports to developing nations is largely fueled by Florida’s growing exports to the Caribbean, Latin America and South America. The area is home to 16 of Florida’s top 20 export destinations. Exports to those areas have grown from 43% of total exports in 2008 to 54% in 2017. Advances in shipping technology, and improved phytosanitary controls have given Florida exporters significant competitive advantages over other sources, particularly for fresh vegetables, meat and seafood. Expansion of Florida ports and improvements in infrastructure allow shippers to swiftly and economically transport products from Florida’s farms and dairies to markets throughout these regions. The United States also has free trade or trade promotion agreements with many countries in these areas including Chile, Colombia, Costa Rica, Dominican Republic, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Peru and Panama.
South America

Since 2010, exports to South America have increased at an average annual rate of 8.2%. Overall, South America accounts for 11% of Florida agricultural exports.

Despite ongoing political and economic uncertainties, exports to Brazil have been on a steady upward trajectory for the past decade. Since 2008, Florida exports to Brazil have increased 260%.
With $139 million in exports in 2017, Colombia represents 3.4% of Florida’s total agricultural exports. Since 2008, exports to Colombia have grown 9.8% annually, making it Florida’s fastest growing market in South America and 7th largest trading partner overall.
Latin America

Latin America (Mexico and Central America) continues to be a source of speedy growth for Florida exports, rising 85% since 2009. The United States has free trade agreements with all the countries in this region either through the Central American Free Trade Agreement (CAFTA-DR) or through the North American Free Trade Agreement (NAFTA). While Panama is not included in either of these agreements, the US does have a Trade Promotion Agreement (TPA) with Panama that has reduced or eliminated tariffs on agricultural and industrial products. Since 2009, Florida exports to Latin America have grown at an annual rate of 5.7%.

After dropping in 2016 for the first time in seven years, exports to Mexico, a NAFTA member, rebounded sharply in 2017, rising 35%. The increase was driven by surges in dairy products, coffee and sugars. For more than a decade, Mexico has been one of Florida’s fastest growing markets, currently ranking as Florida’s 2nd largest trading partner. Exports to Mexico have grown at an average annual rate of 13.5% since 2008.
Known worldwide for its canal, Panama is a prime market for Florida exports. Florida exports grew at an average annual rate of 7.6% from 2008 to 2017. For the past three years, Panama has ranked as Florida’s 5th largest trading partner. The small country is an important transshipping hub, taking large shipments and breaking them down to smaller shipments and re-exporting throughout the region.

Since 2008, exports to Costa Rica have risen 194%, making it one of Florida’s fastest growing markets. Currently ranked as Florida’s 10th largest trading partner, exports have increased at an average annual rate of 11.4% since 2008.
Caribbean

The Caribbean region represents Florida’s largest single trading bloc, accounting for more than a quarter of all Florida agricultural exports. This area is home to 3 of Florida’s 10 largest export partners: Dominican Republic, Bahamas and Trinidad and Tobago. Exports in 2017 set a new high for the past decade at $1.2 billion, an increase of 43% since 2009.

After dipping in 2016 for the first time since 2009, agricultural exports to Trinidad and Tobago rose 6.5% as the island nation begins to emerge from a recession. The country is one of the fastest growing markets in the Caribbean region with exports increasing at an average annual rate of 5.3% since 2008. Trinidad and Tobago currently ranks as Florida’s 8th largest export partner for the 3rd straight year.
Despite an increase of 4.6% in exports in 2017, the Bahamas dropped from 3\(^{rd}\) to 4\(^{th}\) on the list of Florida’s largest export partners trailing Canada, Mexico and Dominican Republic. With a 2018 population of less than 400,000, strong consumer demand is supported by a prosperous tourism industry. Florida exports have grown 46% in the past decade.

The Dominican Republic ranks 3\(^{rd}\), only behind Canada and Mexico among Florida’s export partners. But after increasing 74% from 2009 to 2016, exports dipped 7% in 2017. Even so, the Dominican Republic still has the largest economy in the Caribbean and Central America. Once based on agriculture and mining, the economy now emphasizes the service sector. Increases in tourism and demand for high quality goods are anticipated in coming years.

In recent years, FDACS marketers have undertaken several missions to this region to create partnerships with merchants including Puerto Rico, Colombia, Panama, Costa Rica, Chile, Guatemala, Jamaica and Trinidad and Tobago. Efforts to expand the “Fresh From Florida” presence are under review.
Asia

Southeast Asia, South Asia and East Asia have long been favored destinations for Florida exports. However, a confluence of circumstances including economic uncertainty, currency fluctuations and shifting consumer preferences has slowed growth in recent years. Since 2011, exports have declined 22% from $365 million to $285 million in 2016. This is in sharp contrast to the period from 2008 to 2011 when exports grew 63%.

After increasing 450% from 2009 to 2015, exports to Florida’s largest East Asian export partner, South Korea, plunged 40% in the past two years. Large increases in dairy products, vegetables and tobacco were offset by declines in meat, fruit and beverages.
Exports to Japan, Florida’s second largest East Asian export partner, have declined for seven consecutive years, including a 12% drop in 2017. Since 2010, exports have plunged 61%. Several factors, including a lagging economy and declining population, have resulted in the steady drop in exports to Japan. In the past decade, the average annual growth rate has been -8.6%.

![Florida Agricultural Exports to Japan 2008-2017](chart1)

Although small in size, Singapore ranked 39th on Florida’s export list at $24.5 million in 2017. Fueled by large increases in shipments of fish, cereal and tobacco, exports increased 25% in 2017 and have gone up 122% since 2008. In the past decade, the average annual growth rate has been 8%.

![Florida Agricultural Exports to Singapore 2008-2017](chart2)
Over the past decade, Florida’s exports to the world’s most populous nation have been characterized by a series of sharp upward and downward spikes. Since peaking at $90 million in 2011, exports have decreased 35%. More than 85% of exports fall under the categories of fish, crustaceans and vegetables. China currently ranks 14th among Florida’s export partners.
Europe

Exports to the European Union (EU) have been in freefall since 2011, declining 35.6% in that span. Much of the decrease can be attributed to a concurrent plunge in exports of frozen orange juice, a market Brazil aggressively pursued.

![Graph showing Florida Agricultural Exports to European Union 2008-2017](source: US Census Bureau Trade Data)

The drop in exports to the EU is part of the overall drop in Florida exports to developed economies. Some of Florida’s largest EU markets such as the Netherlands, Germany and the United Kingdom have seen sharp declines in Florida agricultural exports since 2013. Some of this decline may be attributable to the strengthening US dollar. This makes imports from the US, including agricultural products, more expensive in terms of the local currency.

The Netherlands is emblematic of the declining European market. In 2017 it ranked as Florida’s 6th largest export market, down from third in 2014. Exports have decreased 46% since 2011.

![Graph showing Florida Agricultural Exports to Netherlands 2008-2017](source: Euromonitor International)
Other Export Blocs

With a combined $65 million in exports in 2017, these four blocs—Oceania, Africa, former Soviet Union and Scandinavia—represent 1.6% of Florida agricultural exports, down slightly from 1.7% in 2016.

After steadily climbing to a decade-long high of $58 million in 2012, exports to Oceania have been in freefall, plunging 43% to $33 million in 2017. The vast distances to these destinations at the bottom of the world makes it difficult and expensive to ship fresh produce.

After declining almost 50% in the previous 5 years, exports to Africa rose 28% in 2017, spurred largely by increases in shrimp and nuts.
Over the past decade exports to countries Russia have been characterized by sharp swings from year to year. Since 2008, the average annual growth rate has declined 19.5%.

A series of sharp spikes has characterized exports to Scandinavia during the past decade. Since 2015 exports have declined 55%.
Of the world’s 14 major trading blocs, the Caribbean and North America continue to set the pace accounting for 53.8% of all Florida agricultural exports, a slight increase from 52.4% in 2016. The real estate mantra, location, location, location comes into play as the top 4 leading trading blocs--the Caribbean, North America, Central America and South America--can be reached without crossing any of the world’s oceans. The top 12 trading blocs are unchanged from 2016.
Exports of Selected Florida Commodities
Orange Juice

Orange juice is Florida’s signature drink and a leading agricultural export commodity, comprising 3.2% of Florida’s agricultural exports in 2017. At $129 million, orange juice exports were down 9.8% from last year’s $143.

When taking into consideration exports from northern US ports in New Jersey and Delaware, total juice exports came to $328 million, a decrease of 13.8% from 2016. Export totals are reported based on the port the product is shipped from, regardless of the state of origination. Delaware and New Jersey do not have any orange production or processing facilities, so it is reasonable to assume that all or most of the orange juice shipped from those states originated in Florida.

After a decade-long upward trajectory, the value of Florida orange juice exports peaked at $610 million in 2011. Since then, a combination of shifting consumer preferences and reduced orange production has led to a decrease in exports of 46.3% to $328 million in 2017.
Although exports of Florida orange juice to Canada declined 12.3% to $214 million in 2017, the country remains the top destination. The Netherlands, South Korea, Dominican Republic, Belgium and Saudi Arabia complete the leading destinations of orange juice exports.

Data provided by the Foreign Agricultural Service of the USDA shows worldwide orange juice consumption has decreased by 21% since 2012. Competition from energy drinks, vitamin waters and other non-carbonated drinks have contributed to the overall decline in consumption in recent years. Increasing consumer prices and concerns over health-related issues have also been contributing factors.
Declines in US orange juice consumption have actually been greater than the worldwide figure. Since 2012, US orange juice consumption has declined by 30.5%. Consumption has declined every year since 2012.
Grapefruit Juice

Despite declining for the 3rd consecutive year, Florida again led the nation in grapefruit juice exports at $19 million, a drop of 11.6% from 2016. Many of the same pressures facing orange juice consumption affect grapefruit juice as well. Increasing use of medications—which for reasons of acidity—are incompatible with grapefruit juice, has also affected consumption worldwide.

Two nations, a world apart, dominate Florida grapefruit juice exports. The Netherlands is again the leading destination, followed by Japan. Ireland, China and Canada round out the top 5, which account for 82.9% of exports.
**Fresh Fruits**

In 2017, US growers exported $14.9 billion in fruits and nuts. Once again, California was the dominant leader with $10.8 billion worth of product shipped, comprising 72.5% of all US fruit and nut exports. For the fourth straight year Florida is ranked 4th behind California, Washington and Texas, which is home to several of the busiest border crossings into Mexico.

Despite declining 5.5% in 2017, Florida managed to hold on to 4th place, just ahead of Arizona, which increased exports to 22.3%. Fruit exports can fluctuate by several percentage points from year to year due to a variety of factors. Weather conditions, prices to growers, foreign exchange rates, shipping costs and several other factors all combine to affect the size of a crop during any given year.

Florida’s top 2 leading destinations remained the same as 2016 with Canada the destination of 61.1% of Florida’s fruits and nuts exports. Japan, Bahamas, Trinidad and Tobago and Netherlands Antilles round out the top 5, which account for 76.6% of fruits and nuts exports.
Fruit exports have decreased for the past 6 consecutive years and since 2008 have fallen 29%. Over the past decade, the average annual growth rate declined 3.4%.

Strawberry exports increased 14% in 2017 to become Florida’s leading fruit export, surpassing grapefruit, which decreased 40.3%. Oranges, Florida’s other signature fruit, declined 24.4% to drop to 11th among fruit exports. Seven of the top 11 exports showed declines from 2016.
Despite the sharp decline in 2017, Florida retained its leadership among grapefruit exporting states, nearly doubling the output of California. Florida accounts for 51.9% of the nation’s grapefruit exports.

By better than a two-to-one margin Japan was the leading destination for Florida grapefruit exports, even as overall grapefruit exports declined 40.3% from 2016. Exports to the top five partners comprised 92% of total exports.

Exports of Florida grapefruit declined 40.4% in 2017 and 74% in the past decade. Grapefruit faces pressure from slumping consumption in Florida’s leading market, Japan, and from citrus greening. Despite intensive government and private industry research, greening remains a threat to citrus production in Florida and beyond.
Bucking a worldwide trend, China’s grapefruit consumption has increased 5 straight years, climbing 42.5% in that time. China is the world’s leading producer of grapefruit.

Elsewhere in the Far East, domestic consumption in Japan has shrunk from 147 thousand tons in 2012 to 101 thousand tons in 2017, a decrease of 31.3%. Changes in consumer preferences, an aging population and increased competition from other fruit categories all factor into this decline. Currency fluctuations have made grapefruit imported from the US more expensive in terms of the local currency.

Domestic consumption of fresh grapefruit has also declined in the United States, dropping 33.3% from 2012 to 2017. Many of the factors affecting consumption worldwide are also at play in the US. As tastes have changed and with more people taking medications not compatible with grapefruit, demand for the fruit has waned.
Fresh Oranges

United States exports of oranges fell 2.2% in 2017. This decline was fueled in part by declines in California and Florida of 1.7% and 24.4% respectively. Citrus greening and Hurricane Irma are the two main causes for the Florida decrease. Despite the drop, California accounted for 94.1% of exports. California exports approximately 90% of its oranges and processes the rest into juice. It’s the opposite in Florida, which exports approximately 10% of its oranges and turns the rest into juice. California produces several varieties of navel oranges, which are preferred by consumers for eating. The Florida orange crop has long been dominated by different varieties of Valencia oranges, grown primarily for their sweeter juice.

By a nearly five-to-one margin, Canada is the leading export destination for Florida’s signature crop. Taiwan, ranked second on last year’s list, didn’t receive any Florida oranges in 2017.
After years of consistent export levels, shipments of fresh oranges took a sharp drop, falling nearly 25% in 2017. As with grapefruit, China continues to increase production of fresh and processing oranges. As incomes rise in China, demand for value-added fruit products such as orange juice has grown. Chinese citrus growers continue to add acreage and trees in an effort to grow production despite losses to greening.
Leading Fruit Exports

Fresh Strawberries

Strawberries were Florida’s leading fruit export in 2017 with a value of $52 million, ranking Florida 2nd behind California. California and Florida account for 85% of the US output of strawberries. The five-leading strawberry producing states remain unchanged from 2016.

Canada remained Florida’s leading destination for fresh strawberries in 2017 with $47.47 million or 90% of strawberry exports. Eastern Canada, including the most populous provinces Ontario and Quebec, is only two days travel time by refrigerated truck or rail from Florida. Since fruits begin to lose flavor immediately after being picked, minimizing travel time is critical.
With strawberries being one of the world’s most popular fruits, Florida faces competition from growers in California and Mexico, which have overlapping harvests with Florida. University of Florida scientists at the Institute of Food and Agricultural Science (IFAS) are constantly developing new cultivars to give Florida growers an advantage over the competition by breeding fruit that will last longer and travel better.

Over the past decade, strawberry exports have been characterized by sharp spikes in odd-numbered years, the latest one a 14% increase in 2017. Since 2008, the average annual growth rate is 2.7%.
For the third straight year the top 4 watermelon exporting states remain unchanged. Overall, Florida accounted for 27.9% of the US output of watermelon exports.

Canada was the leading destination with 98.9% of all Florida watermelon exports. The remaining 1.1% was spread among the Bahamas, Turks and Caicos Islands, Cayman Islands and four other countries. Florida has led the US in watermelon exports for 13 of the last 14 seasons.

Florida watermelon exports increased 35.6% since 2008, but have declined 24.1% since 2012. Since 2008, the average annual growth rate is 3.1%.
Fresh Blueberries

From 2016 to 2017, California increased its blueberry exports 23%, while Florida’s declined by 4%. California’s $59 million in exports exceeds the combined export totals of Florida and Washington. Florida’s share of US exports came to 14.4% compared to California’s 30.8%.

Florida’s blueberry crop is harvested during a period when no other major northern hemisphere region is producing. Florida’s season begins as Chile’s season ends and just before Georgia blueberries come to market. This unique window gives Florida exclusive access to international and domestic markets. Increasing domestic demand may be one reason exports have declined. As the various health benefits of eating blueberries become widely known, health conscious consumers have begun to incorporate more of the fruit into their diets.

Florida’s leading export partner remains Canada with more than $26 million in shipments in 2017. Canada accounted for 95% of exports with the top 4 destinations accounting for virtually all of Florida’s blueberry exports.
Florida’s blueberry exports declined in 2017 for the fourth consecutive year. Since 2008, the average annual growth rate is -5.3%.
Fresh Melons

Accounting for 41.2% of US melon exports, California led Florida by better than a two-to-one margin. The fresh melon category does not include watermelons. Florida’s melon exports accounted for 19.1% of total US exports and the top 5 states combined for 81.7% of total US output. The majority of fresh melons grown in Florida are cantaloupes. Florida cantaloupes have a relatively short season beginning in late April and lasting through mid-June.

The top 5 export destinations for Florida fresh melons are unchanged from 2016, with Canada accounting for 92.5% of exports. The remaining 7.5% is almost entirely spread among Kuwait, Bahamas, Netherlands Antilles and Cayman Islands. During the first part of their season, Florida growers face competition from Central American and Mexican imports. The California cantaloupe season begins around the same time as Florida’s and continues through December. Most Florida cantaloupes are harvested in the central part of the state.

After increasing 39.7% from 2008-2015, Florida fresh melon exports have since decreased 14.2%. Like most fruits and vegetables grown in Florida, melons are subject to changes in weather patterns from year to year.
Fresh Vegetables

Led by California, the top four vegetable exporting states remain unchanged from 2016. Much of California’s vegetable crop comes from the San Joaquin Valley, commonly referred to as “America’s Salad Bowl.” Florida exported fresh vegetables worth $291 million, accounting for 6% of all fresh vegetables exported from the US in 2017. It is possible a portion of Florida’s fresh vegetable exports to Canada was in trucks or rail cars that crossed the border at Michigan ports.

By a better than 17-to-1 margin, Canada is the leading destination for Florida fresh vegetables, comprising 35% of exports. The Bahamas, Haiti, Trinidad and Tobago and Dominican Republic round out the top 5 destinations which combined for 41% of Florida’s fresh vegetable exports.

During a decade characterized by sharp upward and downward spikes, Florida’s fresh vegetable exports ended 2017 right back where they were in 2008—at $291 million. The same factors that affect fruit crops also affect vegetable crops. Fresh vegetables can be transported quickly and economically from countries as far away as Chile, Brazil and Mexico. Combined with lower labor and input costs, wholesale price becomes more of a factor in whom a retailer may buy fresh vegetables from. Florida still enjoys some exclusive seasons, but with the worldwide spread of cultivars developed for Florida, this exclusivity is becoming less of a factor. Greenhouse and controlled environment growers also present a challenge to producers. The rise in popularity of organic agriculture is yet another challenge that must be faced by Florida growers.
Fresh Tomatoes

For the second straight year, Florida ranked 5th in the value of tomatoes exported. Two states ranked above Florida have a value of production less than the value of exports credited to them. Michigan and Arizona are home to some of the busiest border crossings and thus may be credited with shipments that originated in other states. While California has the higher overall value of tomatoes produced, most of them are for processing. Tomatoes are the most popular vegetable, or fruit, in the United States.

The top six export destinations remained unchanged from 2016, with Canada once again leading by a wide margin, garnering 92.2% of the total. Several factors influence Florida’s export sales numbers, a major one being competition from Mexico and Canada.
Despite reaching a 10-year low for the second straight year, tomatoes continue to be Florida’s most valuable export. Since 2008, the average annual growth rate is -5.6%. During this period, exports have ranged from a high of $91 million in 2008 to the current low of $51 million.
Fresh Peppers

The top six leading fresh pepper exporting states remain unchanged from 2016. Once again, the higher ranking of Arizona and Michigan can be attributed to their busy border crossings and not the value of their fresh pepper production. The top six states combined for 85% of fresh pepper exports.

As with most fresh vegetables, Canada is the leading destination of fresh pepper exports. With a value of just over $30 million, Canada comprises 92.6% of all exports. The six leading destinations accounted for 98.8% of 2017 exports.

Florida fresh pepper exports fell to a 10-year low in 2017 at $32 million, down 27.6% from the decade-long high of $44 million in 2008. Florida growers tend to receive above average prices for their fresh peppers due to seasonality differences with California. Foreign competition is almost exclusively limited to Mexico, which has a similar growing season.
Fresh Snap Beans

Florida led California by a better than two-to-one margin in snap bean exports, with a total value of $22.98 million, representing 39.3% of the value of all snap bean exports in 2017. This is down from the 47.9% in 2016. The top five states accounted for 65.5% of exports.

Canada remains Florida’s leading destination for fresh snap bean exports. Our neighbor to the north accounted for 90.3% of the total value of exports, with the United Kingdom, Dominican Republic, Haiti and Cayman Islands making up the rest of the top five destinations. These destinations account for 99.1% of Florida’s snap bean exports. During snap bean season, which runs from late October through late June, Florida faces competition from domestic producers such as New York and California along with imports from Mexico and Guatemala.

Since reaching a decade-high of $32.5 million in 2009, exports of Florida snap beans have declined nearly 30%. Since 2008, the average annual growth rate is .66%.
Brassicas

Brassicas are actually members of the mustard family and include broccoli, cabbage, cauliflower and turnips. It is most likely broccoli that moved Florida into third place among the states with exports totaling $15 million in 2017. The top 5 states are unchanged from 2016. California accounted for just under half of brassicas exports.

Canada is once again the leading destination for Florida brassicas with $12.12 million in shipments representing 78.9% of the total. The 5 leading destinations accounted for 93.1% of the export value.

Exports of brassicas have increased in nine of the past ten years, rising 226% over that span. The emergence of crops such as broccoli will continue as farmers diversify. Crop diversity provides farmers with a measure of security against diseases, weather conditions and changes in commodity pricing.
Other Fresh Vegetables

Florida ranked a close second to California in other fresh vegetable exports in 2017. Florida totaled 31.8% of total exports while the top 5 states combined for 85.2% of the total. Other fresh vegetables include okra and sweet corn among others. The majority of these exports is generally considered to be sweet corn. Florida usually the US in production value of sweet corn and is a leading exporter. Exports of other fresh vegetables reach their peak in the period from March through June, the peak of Florida sweet corn season.

Canada is the leading destination of other fresh vegetable exports at 76.3%. North America, the Caribbean and Europe are represented among the top 5 export destinations.

Exports of other fresh vegetables reached a six-year high in 2017, topping out at $38.28 million. Since 2012, the average annual growth rate is 1.23%.
Live Plants and Trees

With an increase in exports of 17.1%, Florida surged to the top of live plant and tree exporting states in 2017. Washington experienced a 15.6% decline to drop from first to third. Florida’s $89.3 million accounted for 20% of total US exports of $445.8 million. Oregon and Washington were able to leverage their heavily wooded terrain and proximity to western Canadian and Asian markets to continue to grow their exports over the past decade.

Canada is Florida’s leading export destination with 30.8% of the total value of live plant and tree exports in 2017. The seven leading destinations account for 45.5% of the exports. The number 2 destination, the Netherlands, is home to the world’s largest flower auction.

Despite a 17.2% increase in 2017, Florida’s live plant and tree exports have decreased 23.7% since 2008 with an average annual growth rate of -2.66% in that period. Even so, the overall health of Florida’s horticulture industry remains strong. This does not include lumber/timber.
Cash Receipt Increases and Decreases

All of the commodities on this list showed increases from 2015 to 2016 led by cabbage, which increased value by more than 46%.

There were also some notable declines during this time period led by blueberries, which dropped by nearly 35%. Signature fruit, oranges, showed a decline of almost 9%.
Biggest Export Increases and Decreases

In publications of Florida exports, Belgium has a low profile. But the small (12,000 sq. mi., 11 million pop.) European country recorded the largest percentage increase among Florida’s export partners over the past five years. Among nations with at least $20 million in Florida exports, Belgium increased from $8.3 million in 2013 to $26.9 million in 2017, an increase of 225%. Leading commodities shipped to Belgium included horses, citrus, frozen orange juice and lobsters.

At the other end of the spectrum, the Netherlands experienced the largest percentage decline among Florida’s export partners over the past five years. Among nations with at least $20 million in Florida exports, it decreased from $253 million in 2013 to $143 million in 2017, a drop of 43%.

Despite the decrease, the Netherlands ranked 5th among Florida’s export partners. Canada, Florida’s leading export partner, saw a 22% drop.
2017 Leading Agricultural Output States

The nation’s 3rd largest state in area is first in agricultural exports, totaling $24.15 billion in 2017. Nuts, grapes, oranges and strawberries comprise the bulk of California’s exports with almonds and pistachios alone accounting for $5.7 billion, an amount higher than the total agricultural output of 45 states. Louisiana and Florida are the only southeastern states in the top ten. These 10 states account for 66.7% of total US agricultural output.

2017 Least Agricultural Output States

The state that ranks 50th in population also ranks last in agricultural output by a wide margin. A lack of arable land hampers agriculture in Wyoming, where the terrain is more suited to mining (oil, gas, coal), the state’s top industry. The leading agricultural exports are cattle and beans. These 10 states account for 1.2% of total US agricultural output.
US Agricultural Exports and Imports

After taking a sharp dip in 2015, US agricultural exports have now been up for two straight years, climbing 3.7%. Since 2000, developing countries—led by China—have been the main driver of US export gains. Since 2008, US agricultural exports have increased 25.8%.

The value of US agricultural imports has increased every year since 2009, growing 68.2% in that period. Imports totaled $145 billion in 2017, the highest of the past decade.
US Agricultural Destinations and Partners

The top seven destinations for US agricultural products are unchanged from 2016, although the gaps between Canada, China and Mexico are shrinking. Except for Indonesia, all of the top ten export partners are in the northern hemisphere. A total of six of the partners are in Asia and only one is in Europe. The ten leading destinations account for 67.4% of exports.

North American neighbors Mexico and Canada top the list of US agricultural import partners, comprising 38.8% of all imports. Mexico is a leading source of fruits and vegetables and a leading destination of US grains, fruits and vegetables. Imports totaled $121 billion, a 5.7% increase over 2016. The US imported product from 174 countries and territories in 2017.
References


Researcher’s Note:
The United States Census Bureau and Euromonitor International provide the statistical data in this report which represents the most current information available. The state level export data reported to the Census Bureau. A small percentage of exports are marked from the shipping point and not necessarily their point of origin. This is a crucial distinction, e.g. orange juice grown and produced in Florida may be exported to Europe from New Jersey. For reporting purposes, some of this product may be marked as exported from New Jersey and is therefore categorized as an export of New Jersey. We refer to this as a “probable transshipment.”