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Nebraska Cooperative Extension Service EC 87-881

A Market Survey of Fresh Vegetable Use in the Nebraska Panhandle

James G. Robb, Don L. Lease II,
Robert G. Wilson, C. Dean Yonts,
John A. Smith, Eric D. Kerr
and Arnold J. Bateman[1]

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Acknowledgments

We express our appreciation to the Nebraska Bankers Association for funding vegetable work at the University of Nebraska Panhandle Research and Extension Center in 1987. We thank the Panhandle grocers and others involved with vegetable marketing who cooperated in this survey. Also, we appreciate the efforts of those who reviewed this circular especially Dave Nuland.

A Market Survey of Fresh Vegetable Use in the Nebraska Panhandle

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Summary

There is a small but viable fresh vegetable industry in the Nebraska Panhandle. This survey documents many aspects of fresh vegetable use in the area and provides some insight into the larger regional market. Delivering a quality product at a competitive price is the key to entering this intensely aggressive market. Farmers must maintain a high degree of professionalism to develop the full vegetable market potential of the area and region.

Introduction

Economic conditions in agriculture today have created an increased interest in a variety of non-traditional crops including vegetables. Many vegetables have the potential to be grown in the Nebraska Panhandle (Neild, et. al., 1986). Successful development of a vegetable industry requires both the ability to produce and market. Developing vegetable outlets requires analysis of both the processing and fresh markets.

This circular presents the results of a fresh vegetable market analysis conducted in the Nebraska Panhandle area during March 1987. Surveys were used to help define potential demand for locally produced fresh vegetables using the knowledge of grocers and wholesalers in the area. Additional information on the Nebraska wholesale vegetable industry is available from a survey conducted by the University of Nebraska (Food Processing Center, 1986).

Method

Personal interviews were requested of the 29 major grocers and wholesalers in the region. Nineteen grocers and two wholesalers responded to the survey; eight grocers did not respond or did not respond to survey sections related to vegetable use (Appendix). No attempts were made to estimate the vegetable use of these eight grocers. Figure 1A shows the Nebraska Panhandle and eastern Wyoming survey area. Of the 21 participants, nine requested that they be allowed to complete the survey on their own time. The remaining twelve completed the survey through an interview. All participants reviewed their responses and then discussed their perceptions of using locally produced vegetables. This survey focused on grocers and wholesalers selling vegetables to end consumers to eliminate double counting vegetable use.

The project was then expanded to the region, as shown in Figure 1B, and included: Rapid City, South Dakota; Cheyenne, Wyoming; and Fort Collins, Longmont, and Greeley, Colorado. This portion of the study dealt exclusively with wholesalers. These interviews were personally conducted and focused on their perception of marketing vegetables grown in the Panhandle for the regional market.

Vegetable Use In The Nebraska Panhandle

Researchers at the University of Nebraska Panhandle Research and Extension Center and several local farmers have successfully grown an assortment of vegetables. The seven which predominate are: bell peppers, broccoli, cabbage, onions, potatoes, pumpkins and sweet corn. Area grocers and wholesalers expressed interest in buying more vegetables from local farmers.

[1]Farm Management Specialist, Part-time Vegetable Assistant, Weeds Specialist, Irrigation Engineer, Machinery Systems Engineer, Plant Pathologist and Resource Development Specialist at the University of Nebraska-Lincoln, Panhandle Research and Extension Center.

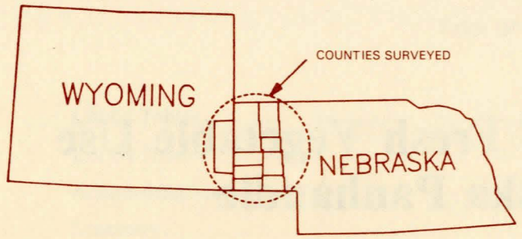

Figure 1A. Local Vegetable Market Survey Area

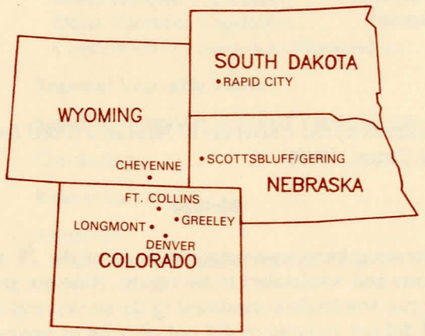

Figure 1B. Regional Wholesale Vegetable Market Survey Area

Seven Selected Vegetables

Seven vegetables, which were grown by local farmers in 1986 and used by area grocers, are discussed in this section. These vegetables are bell peppers, broccoli, cabbage, onions, potatoes, pumpkins and sweet corn. Table 1 lists their weekly consumption (June through September except for potatoes and pumpkins), peak marketing season, shelf-life, and the preferred standard for packaging. Complete survey results can be found in the Appendix.

In terms of pounds, pumpkins (75,990 lb) have large weekly consumption but the shortest peak season due to their ornamental use. Potatoes (81,510 lb) have the highest weekly consumption, with peak use during the winter. Sweet corn (2781 dozen per week) is used most in summer and onions (7510 lb per week) are used most in fall. Cabbage (9420 lb per week), broccoli (2355 lb per week) and bell peppers (2465 lb per week) tend to be used throughout the year. Shelf-life was shortest for sweet corn (three days) and longest for pumpkins (21 days).

Scottsbluff/Gering is the trade center for the Nebraska Panhandle area. Six of the seven grocers in Scottsbluff/Gering provided weekly consumption figures for the June through September period (Table 2). This trade center consumes 27 percent of the potatoes and 50 percent of the broccoli used in the total survey area.

Table 2. Selected Fresh Vegetable Use by Scottsbluff/Gering Grocers and Percent of Area Use (Survey Respondents)

Vegetable	*Consumption per Week*[a]	*Percent of regional consumption*
Bell Peppers	755 (lb)	31
Broccoli	1180 (lb)	50
Cabbage	2950 (lb)	31
Onions	3275 (lb)	35
Potatoes	18800 (lb)	27
Pumpkins	24800 (lb)	33
Sweet Corn	1196 (dz)	42

[a]Consumption per week is June through September for all vegetables except pumpkins.

Table 1. Selected Fresh Vegetable Use in the Panhandle Area (Survey Respondents)

Vegetable	*Consumption per week*[a]	*Peak Season*	*Shelf-life Days*	*Packaging Standard*
Bell Peppers	2465 (lb)	annual	7	bushel box
Broccoli	2355 (lb)	annual	6	14-18 count box
Cabbage	9420 (lb)	annual	10	38 lb sack
Onions	7510 (lb)	fall	14	50 lb sack
Potatoes	81510 (lb)	winter	14	5-10-20 lb bag
Pumpkins	75990 (lb)	Sept-Oct	21	loose or crib
Sweet Corn	2781 (dz)	summer	3	60 count carton

[a]Consumption per week is for June through September for all vegetables except potatoes and pumpkins (October through May).

Figure 2 shows the percent of these seven selected vegetables which are used in the Scottsbluff/Gering retail market and bought from local farmers. This percent was calculated using the quantity of each vegetable bought from local farmers and dividing by the total requirements of the surveyed grocers.

Less than 10 percent of the bell peppers and broccoli used by these grocers are from local farmers. Between 30 and 50 percent of the cabbage, onions and potatoes used are from local farmers. Between 70 and 90 percent of the pumpkins and sweet corn used are from local farmers.

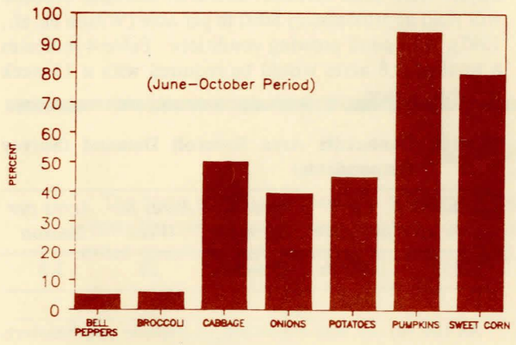

Figure 2. Purchases From Local Farmers By Responding Retail Grocers Scottsbluff/Gering. (Purchases are June through September for all vegetables except pumpkins.)

Other Potential Vegetables

Based on this survey, there are fresh vegetables which have market potential but which currently are not grown commercially in the Nebraska Panhandle. These vegetables are sprouts (alfalfa and bean), cantaloupe, carrots, cauliflower, Indian corn, mushrooms and squash (summer and winter). Table 3 shows the consumption per week (June through September for all vegetables except Indian corn and winter squash), peak season, shelf-life and preferred packaging standard for these vegetables.

Grocers and wholesalers use cantaloupe, Indian corn, summer squash and winter squash in season. Alfalfa sprouts, bean sprouts, carrots, cauliflower and mushrooms are used throughout the year. Many of these vegetables have a shelf-life of only three to six days.

Concerns of Grocers and Wholesalers

Area grocers and wholesalers expressed concerns with the ability of local farmers to supply a professional product. Professionalism was viewed as proper processing, quality control, and delivery of committed produce, including:

1) packaging according to size and quality,
2) packaging in a standard container,
3) proper cooling before and after packaging, and
4) consistent, timely delivery.

All respondents considered "quality" to be very important. Quality was considered more important than price, given that the price was reasonable. Respondents indicated that they and the vegetable marketing system in general will not accept delivery of poor quality vegetables. Even with their emphasis on buying quality, surveyed grocers and wholesalers stated that when they received complaints about their vegetables, poor quality was most often the customer's concern.

Table 3. Additional Fresh Vegetables with Market Potential in Western Nebraska (Survey Respondents)

Vegetable	*Consumption per week*[a]	*Peak Season*	*Shelf-life Days*	*Packaging Standard*
Alfalfa Sprouts	123 (lb)	annual	3	7 lb sack box
Bean Sprouts	238 (lb)	annual	3	10 lb sack box
Cantaloupe	18820 (lb)	summer	10	Crib or 40 lb box
Carrots	5203 (lb)	annual	14	1-2 lb cello bag
Cauliflower	3262 (lb)	annual	6	9-12 count box—head cello wrapped
Indian Corn	1805 (ears)	Oct-Dec	21	10-20 lb
Mushrooms	810 (lb)	annual	4	8 oz-10 lb box
Summer Squash	398 (lb)	summer	4	30 lb box
Winter Squash	1582 (lb)	Sept-Dec	21	30-40 lb box

[a]Consumption per week is June through September for all vegetables except Indian corn and winter squash (October through May).

Grocers desired bi-weekly delivery of vegetables arriving in the early morning; wholesalers normally stocked on a tri-weekly or daily basis.

All respondents related concerns about the seasonality of vegetable supplies from this area. Seasonality works in two ways: first, vegetables have a limited field growing season in the Panhandle; secondly, when vegetables can be grown commercially, they can also be grown in home gardens. This tends to reduce retail demand.

A few grocers expressed concerns with alienation of their normal supplier. This stems from the loyalty aspect involved in the wholesale-retail relationship, where retailers generally buy many of their vegetable and other items from a major supplier. Also, they may not want to alienate themselves from a proven long-term or out-of-season vegetable supplier.

Regional Vegetable Market

Colorado is the center of vegetable production, packaging and shipping in the region, which includes much of Nebraska, South Dakota, Wyoming and adjoining states. Denver, the region's terminal wholesale market place, has a number of participants and several large vegetable wholesalers. For example, Safeway Stores, Inc. services all its grocers in Colorado and surrounding states from vegetable warehouses in Denver. Significant vegetable trade exists between wholesalers in Denver. There also are joint purchases and shipping of vegetables brought in from California and other vegetable and fruit growing areas. Denver is the only market place in the region for which fresh vegetable and fruit wholesale prices are reported (USDA, 1987).

The Greeley, Longmont and Fort Collins, Colorado and Cheyenne, Wyoming areas are serviced by a loosely organized group of vegetable wholesalers, who mostly service small retailers and restaurants. These wholesalers are competitive yet have developed some rather well defined market territories. To meet spot demand, they often trade vegetables among themselves. They tend to buy local commercially grown vegetables before buying from out-of-state suppliers or the Denver market place.

Western South Dakota, northern Wyoming and some of western Nebraska are serviced by Rapid City, South Dakota vegetable wholesalers. Rapid City has one large grocery chain wholesaler with a large regional warehouse and a few smaller wholesalers.

Wholesalers in Rapid City, Cheyenne, Greeley, Fort Collins and Longmont expressed an interest in buying locally or regionally grown quality vegetables of commercial volume. Wholesalers interviewed said there was little potential for new farmers to directly enter the Denver vegetable market place, especially as individuals. Wholesalers outside the Denver market place suggested that an organization of farmers would have two major advantages. First was variety in types of vegetables that could be produced and marketed. Second was diversity of vegetable growing locations.

Most wholesalers supplying stores in the Nebraska Panhandle indicated an interest in buying vegetables produced in this area to provide back-hauls for their trucks. This would require a central loading facility which does not currently exist.

Supplying Local Or Regional Vegetable Demand

The local population does provide some demand for locally grown vegetables. Table 1 can be used to estimate local broccoli demand (2355 lb per week). Grocers not cooperating in this survey were not considered likely buyers from local farmers. Research indicates broccoli will yield approximately 8000 lb per acre (Wilson et. al., 1987), with good growing conditions. Table 4 indicates a total of 3.8 acres would be required with a 13-week growing season.

Table 4. Panhandle Area Broccoli Demand (Survey Respondents)

Demand per week	*Yield per Acre*	*Season Length*	*Acres per Week*	*Acres per Season*
2355	8000 lb	13 weeks	.29	3.8

As the survey was expanded to include southeastern Wyoming and western South Dakota, the required acres increased enough to justify more than one small farmer. Two wholesalers in the Rapid City area indicated a use of 225-300 (25 lb) boxes of broccoli per week. Table 5 illustrates these wholesalers' weekly demand (6250 lb) requiring 10.1 acres per year with a 13-week growing season. With diversification into other vegetable crops, this demand would probably support a small group of farmers.

Table 5. Regional Broccoli Demand (Survey Respondents)

Demand per week	*Yield per Acre*	*Season Length*	*Acres per Week*	*Acres per Season*
6250	8000 lb	13 weeks	.78	10.1

Conclusion

Fresh vegetables purchased most from local farmers by Scottsbluff/Gering grocers were pumpkins, sweet corn, cabbage, potatoes and onions, respectively. Vegetables with market potential which are not commercially produced in the area are: sprouts (alfalfa and bean), cantaloupe, carrots, cauliflower, Indian corn, mushrooms and squash (summer and winter).

Wholesalers servicing the Nebraska Panhandle region have expressed an interest in buying quality vegetables produced locally. Also, they have some interest in back-hauling fresh vegetables.

The major concern of area grocers and wholesalers is that farmers provide a quality and professional vegetable product.

Relatively small acreages are required to fill area fresh vegetable use. For example, 10.1 acres of quality broccoli would fill regional demand during the growing season.

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USDA. 1987. Denver Fresh Fruit and Vegetable Wholesale Market Prices-1986. Federal-State Market News Service, Agricultural Marketing Service, Denver Colorado. 42 p.

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Appendix

The form used to conduct the Nebraska Panhandle area survey is presented here. Total weekly vegetable use for survey respondents is shown in pounds (lb) except as noted. Responses to open-ended questions and comments are summarized.

_____ (Contact) _____ (Date) _____ (Location)

UNIVERSITY OF NEBRASKA
1987 FRESH VEGETABLE SURVEY

1) How much of each vegetable do you sell on a weekly basis from June through September?

696	Asparagus	3334	Onion (Green) bunches
2465	Bell Peppers	0	Ornamental Vegetables (Indian Corn) ears
2355	Broccoli	69	Peas
181	Brussels Sprouts	69245	Potato
9420	Cabbage	0	Pumpkins
18820	Cantaloupe	324	Snap Beans
5203	Carrots	555	Spinach
1126	Radish	398	Squash (Summer)
3262	Cauliflower	629	Squash (Winter)
5388	Celery	2781	Sweet Corn dozen
4065	Cucumbers	520	Sweet Potatoes
144	Egg Plant	9345	Tomato
412	Hot Peppers	42441	Watermelon
30740	Lettuce	100	Other Honeydew Melon
7510	Onion (Bulb)	810	Mushroom
238	Bean Sprouts		
123	Alfalfa Sprouts		

2) How much of each vegetable do you sell on a weekly basis from October through May?

396	Asparagus	2950	Onion (Green) — bunches
2540	Bell Peppers	1805	Ornamental Vegetables (Indian Corn) — ears
2585	Broccoli	57	Peas
100	Brussels Sprouts	81510	Potato
9453	Cabbage	75990	Pumpkins
1262	Cantaloupe	170	Snap Beans
5796	Carrots	498	Spinach
1024	Radish	260	Squash (Summer)
3162	Cauliflower	1582	Squash (Winter)
5944	Celery	62	Sweet Corn — dozen
4505	Cucumbers	1345	Sweet Potatoes
130	Egg Plant	10285	Tomato
415	Hot Peppers	1120	Watermelon
28527	Lettuce	0	Other
7870	Onion (Bulb)	793	Mushroom
216	Bean Sprouts		
94	Alfalfa Sprouts		

3) What is the peak sales season, month or period for each vegetable?

Spring	Asparagus	Summer	Onion (Green)
Annual	Bell Peppers	Oct-Dec	Ornamental Vegetables (Indian Corn)
Annual	Broccoli	Annual	Peas
Annual	Brussels Sprouts	Winter	Potato
Annual	Cabbage	Sep-Oct	Pumpkins
Summer	Canteloupe	Summer	Snap Beans
Annual	Carrots	Annual	Spinach
Annual	Radish	Summer	Squash (Summer)
Annual	Cauliflower	Sep-Dec	Squash (Winter)
Winter	Celery	Summer	Sweet Corn
Winter	Cucumbers	Sep-Jan	Sweet Potatoes
Annual	Egg Plant	Winter	Tomato
Annual	Hot Peppers	Summer	Watermelon
Summer	Lettuce	Summer	Other
Fall	Onion (Bulb)	Annual	Mushroom
Annual	Bean Sprouts		
Annual	Alfalfa Sprouts		

4) What is the desired ordering schedule for each vegetable (Daily, Weekly, Bi-Weekly, Monthly, Bi-Monthly)

Bi-weekly	Asparagus	Bi-weekly	Onion (Green)
"	Bell Peppers	"	Ornamental Vegetables (Indian Corn)
"	Broccoli	"	Peas
"	Brussels Sprouts	"	Potato
"	Cabbage	"	Pumpkins
"	Cantaloupe	"	Snap Beans
"	Carrots	"	Spinach
"	Radish	"	Squash (Summer)
"	Cauliflower	"	Squash (Winter)
"	Celery	"	Sweet Corn
"	Cucumbers	"	Sweet Potatoes
"	Egg Plant	"	Tomato
"	Hot Peppers	"	Watermelon
"	Lettuce	"	Other
"	Onion (Bulb)	"	Mushroom
"	Bean Sprouts		
"	Alfalfa Sprouts		

5) Who are your major buyers of vegetables? (Percent)

84	Households	7	Restaurants
7	Public Institutions	0	Other
2	Resale		

6) What is the shelf life in days of the products you have been buying?

6	Asparagus	7	Onion (Green)
7	Bell Peppers	21	Ornamental Vegetables (Indian Corn)
6	Broccoli	5	Peas
8	Brussels Sprouts	14	Potato
10	Cabbage	21	Pumpkins
10	Cantaloupe	5	Snap Beans
14	Carrots	5	Spinach
5	Radish	4	Squash (Summer)
6	Cauliflower	21	Squash (Winter)
5	Celery	3	Sweet Corn
5	Cucumbers	14	Sweet Potatoes
5	Egg Plant	4	Tomato
3	Hot Peppers	10	Watermelon
2	Lettuce	n/a	Other
14	Onion (Bulb)	4	Mushroom
3	Bean Sprouts		
3	Alfalfa Sprouts		

7) What type of packaging do you prefer (boxed, sack, single, bunched (b), cello-wrapped (c), county (ct), crib (cr), pounds (lb), etc.)

b 20 lb/box	Asparagus	48 ct box	Onion (Green)
30 ct box	Bell Peppers	10 lb box	Ornamental Vegetables (Indian Corn)
b 14-18 ct box	Broccoli		
30 lb box	Brussels Sprouts	bushels	Peas
38 lb sack	Cabbage	5,10,20,50 lb sack	Potato
cr or 40 lb box	Cantaloupe	cr or loose	Pumpkins
c 1,2,5 & 20 lb	Carrots	25 lb box	Snap Beans
b or 12 oz c	Radish	30 lb box	Spinach
9-11 ct box	Cauliflower	30 lb box	Squash (Summer)
c or 38 lb box	Celery	30 lb box	Squash (Winter)
60 ct box	Cucumbers	60 ct box	Sweet Corn
18 lb box	Egg Plant	30 lb box	Sweet Potatoes
10 lb box	Hot Peppers	box	Tomato
ct box	Lettuce	cr or 80 lb box	Watermelon
50 lb sack	Onion (Bulb)	n/a	Other
7 lb box	Bean Sprouts	8 oz or 10 lb box	Mushroom
10 lb box	Alfalfa Sprouts		

8) Compared to price please rate the importance of quality to your customers. (Comment)

Less Important
Equal Importance
More Important

Response: Given a reasonably competitive price, quality is more important than price.

9) Where do you buy your produce and what percent is locally grown?

(June through September)

_____	Asparagus	_____	Onion (Green)
_____	Bell Peppers	_____	Ornamental Vegetables (Indian Corn)
_____	Broccoli		
_____	Brussels Sprouts	_____	Peas
_____	Cabbage	_____	Potato
_____	Cantaloupe	_____	Pumpkins
_____	Carrots	_____	Snap Beans
_____	Radish	_____	Spinach
_____	Cauliflower	_____	Squash (Summer)
_____	Celery	_____	Squash (Winter)
_____	Cucumbers	_____	Sweet Corn
_____	Egg Plant	_____	Sweet Potatoes
_____	Hot Peppers	_____	Tomato
_____	Lettuce	_____	Watermelon
_____	Onion (Bulb)	_____	Other
_____	Bean Sprouts	_____	Mushroom
_____	Alfalfa Sprouts		

(October through May)

_____	Asparagus	_____	Onion (Green)
_____	Bell Peppers	_____	Ornamental Vegetables (Indian Corn)
_____	Broccoli		
_____	Brussels Sprouts	_____	Peas
_____	Cabbage	_____	Potato
_____	Cantaloupe	_____	Pumpkins
_____	Carrots	_____	Snap Beans
_____	Radish	_____	Spinach
_____	Cauliflower	_____	Squash (Summer)
_____	Celery	_____	Squash (Winter)
_____	Cucumbers	_____	Sweet Corn
_____	Egg Plant	_____	Sweet Potatoes
_____	Hot Peppers	_____	Tomato
_____	Lettuce	_____	Watermelon
_____	Onion (Bulb)	_____	Other
_____	Bean Sprouts	_____	Mushroom
_____	Alfalfa Sprouts		

Note: Based on input from a few respondents the results of question number 9 were not published. Relevant aspects are discussed in the text.

10) What are some of the major complaints received about your vegetables?

1) Quality less than desired
2) Price is too high
3) Limited variety of vegetables

11) What are some of the major compliments received about your vegetables?

1) Freshness
2) Good quality
3) Nicely displayed

12) Rank the importance of factors you look for in a vegetable supplier. (1 = very important)

		Responses			
		Average	*Range*	*Most Common*	*No Answer*
Reliability	1 2 3 4 5	1.33	1 - 3	1	3
Freshness	1 2 3 4 5	1.05	1 - 2	1	2
Pricing	1 2 3 4 5	1.84	1 - 5	1	2
Billing	1 2 3 4 5	1.73	1 - 4	1	6
Honesty	1 2 3 4 5	1.11	1 - 2	1	3
Delivery	1 2 3 4 5	1.89	1 - 5	1	2
Variety	1 2 3 4 5	2.00	1 - 4	1	3
Other _____	1 2 3 4 5				
Other _____	1 2 3 4 5				

Other factors were listed by two respondents: Quantity by one; Consistency and packaging by the other.

13) Do you receive quality vegetables grown in the local geographic area (yes or no)? Comments?

Yes, but only a small quantity of total purchases.

14) Can locally grown vegetables, advertised as such, increase the number of consumers shopping in your store (yes or no)? Comments?

Yes, people are interested in locally grown products; they feel buying locally grown vegetables may help the economy.

15) What percent of your net income comes from the sale of vegetables?

For grocers 6 to 12 percent; varies somewhat with season. Seven grocers did not respond to this question.

16) If available at a competitive price and equal quality, would you purchase locally grown vegetables?

Yes, but must be quality vegetables.

17) What are the major advantages and disadvantages of locally grown vegetables?

Advantages:	Freshness and local money transactions.
Disadvantages:	Lack or grading and standard boxing. Inconsistent supply. Limited seasonal availability.

18) Would you prefer to buy locally grown vegetables from one wholesaler or several farmers? (Why)

Generally from one wholesaler because of supply consistency, larger variety supplied by wholesalers and ease of billing. More interest in purchasing from individual farmers if they will deliver to respondent.