

## U.S. Imports of Pumpkins From Mexico Account for One-Third of Global Trade

IndexBox has just published a new report: 'World – Pumpkin (Squash And Gourds) – Market Analysis, Forecast, Size, Trends and Insights'. Here is a summary of the report's key findings.

In 2018, global pumpkin trade is estimated at 1.5M tonnes. The U.S. remains the world's largest and fastest-growing importer (508K tonnes in 2018), which accounts for 34% of global imports, while Mexico holds a 86% share in U.S. pumpkin imports.

The global pumpkin market revenue amounted to \$22.6B in 2018, leveling off at the previous year. This figure reflects the total revenues of producers and importers (excluding logistics costs, retail marketing costs, and retailers' margins, which will be included in the final consumer price).

The market value increased at an average annual rate of +3.2% from 2013 to 2018; the trend pattern remained relatively stable, with somewhat noticeable fluctuations being recorded over the period under review. The most prominent rate of growth was recorded in 2016 with an increase of 6.9% against the previous year. Over the period under review, the global pumpkin market reached its peak figure level in 2018 and is likely to continue its growth in the near future.

### Consumption By Country

The countries with the highest volumes of pumpkin consumption in 2018 were China (7.9M tonnes), India (5.9M tonnes) and Russia (1.3M tonnes), together accounting for 53% of global consumption. These countries were followed by the U.S., Iran, Ukraine, Italy, Indonesia, Bangladesh and Egypt, which together accounted for a further 18%.



From 2013 to 2018, the most notable rate of growth in terms of pumpkin consumption, amongst the main consuming countries, was attained by Indonesia, while the other global leaders experienced more modest paces of growth.

In value terms, India (\$6.1B), China (\$4.7B) and the U.S. (\$1.1B) constituted the countries with the highest levels of market value in 2018, with a combined 53% share of the global market. Russia, Italy, Ukraine, Bangladesh, Egypt, Iran and Indonesia lagged somewhat behind, together comprising a further 14%.

The countries with the highest levels of pumpkin per capita consumption in 2018 were Ukraine (15,778 kg per 1000 persons), Iran (13,096 kg per 1000 persons) and Russia (8,784 kg per 1000 persons).

From 2013 to 2018, the most notable rate of growth in terms of pumpkin per capita consumption, amongst the main consuming countries, was attained by Indonesia, while the other global leaders experienced more modest paces of growth.

### **Market Forecast 2019-2025**

Driven by increasing demand for pumpkin worldwide, the market is expected to continue an upward consumption trend over the next seven years. Market performance is forecast to retain its current trend pattern, expanding with an anticipated CAGR of +2.0% for the seven-year period from 2018 to 2025, which is projected to bring the market volume to 32M tonnes by the end of 2025.

### **Production 2007-2018**

In 2018, approx. 28M tonnes of pumpkin (squash and gourds) were produced worldwide; picking up by 2.8% against the previous year. The total output volume increased at an average annual rate of +2.6% from 2013 to 2018; the trend pattern remained consistent, with only minor fluctuations being recorded throughout the analyzed period. The most prominent rate of growth was recorded in 2018 with an increase of 2.8% y-o-y. In that year, global pumpkin production attained its peak volume and is likely to continue its growth in the immediate term. The general positive trend in terms of pumpkin output was largely conditioned by a



measured increase of the harvested area and a relatively flat trend pattern in yield figures.

In value terms, pumpkin production amounted to \$22.3B in 2018 estimated in export prices. The total output value increased at an average annual rate of +3.4% from 2013 to 2018; the trend pattern remained consistent, with only minor fluctuations being observed over the period under review. The most prominent rate of growth was recorded in 2017 with an increase of 6.9% y-o-y. In that year, global pumpkin production reached its peak level of \$22.5B, leveling off in the following year.

### **Production By Country**

The countries with the highest volumes of pumpkin production in 2018 were China (7.9M tonnes), India (5.9M tonnes) and Russia (1.2M tonnes), with a combined 53% share of global production. These countries were followed by Iran, the U.S., Spain, Ukraine, Mexico, Italy, Indonesia, Bangladesh and Turkey, which together accounted for a further 21%.

From 2013 to 2018, the most notable rate of growth in terms of pumpkin production, amongst the main producing countries, was attained by Indonesia, while the other global leaders experienced more modest paces of growth.

### **Harvested Area 2007-2018**

In 2018, the global harvested area of pumpkin (squash and gourds) amounted to 2B ha, increasing by 2.1% against the previous year. The harvested area increased at an average annual rate of +2.0% from 2013 to 2018; the trend pattern remained consistent, with somewhat noticeable fluctuations being recorded over the period under review. The growth pace was the most rapid in 2018 when harvested area increased by 2.1% year-to-year. In that year, the global pumpkin harvested area attained its peak level and is likely to continue its growth in the immediate term.

### **Yield 2007-2018**

Global average pumpkin yield amounted to 14 kg per ha in 2018, flattening at the previous year. In general, the pumpkin yield continues to indicate a relatively flat trend pattern. The growth pace was the most rapid in 2018 when yield increased by 0.7% against the previous year. In that year, the average pumpkin yield attained its peak level and is likely to continue its growth in the immediate term.



### Exports 2007-2018

Global exports totaled 1.6M tonnes in 2018, increasing by 5.7% against the previous year. The total export volume increased at an average annual rate of +4.9% from 2013 to 2018; the trend pattern remained consistent, with only minor fluctuations being observed throughout the analyzed period. The pace of growth appeared the most rapid in 2016 with an increase of 14% year-to-year. The global exports peaked in 2018 and are likely to continue its growth in the immediate term.

In value terms, pumpkin exports stood at \$1.5B (IndexBox estimates) in 2018. The total export value increased at an average annual rate of +3.3% over the period from 2013 to 2018; the trend pattern remained consistent, with somewhat noticeable fluctuations being observed in certain years. The most prominent rate of growth was recorded in 2017 with an increase of 14% against the previous year. The global exports peaked in 2018 and are expected to retain its growth in the near future.

### Exports by Country

In 2018, Mexico (508K tonnes) and Spain (352K tonnes) represented the major exporters of pumpkin (squash and gourds) around the world, together achieving 55% of total exports. It was distantly followed by New Zealand (81K tonnes), creating a 5.1% share of total exports. The U.S. (67K tonnes), Turkey (67K tonnes), Morocco (51K tonnes), Portugal (51K tonnes), the Netherlands (41K tonnes), France (36K tonnes), China (34K tonnes), Canada (33K tonnes) and Italy (33K tonnes) held a minor share of total exports.

From 2013 to 2018, the most notable rate of growth in terms of exports, amongst the main exporting countries, was attained by China, while the other global leaders experienced more modest paces of growth.

In value terms, the largest pumpkin markets worldwide were Mexico (\$483M), Spain (\$403M) and Morocco (\$64M), with a combined 64% share of global exports. These countries were followed by the U.S., the Netherlands, France, Italy, New Zealand, Turkey, Portugal, China and Canada, which together accounted for a further 24%.



In terms of the main exporting countries, China experienced the highest growth rate of exports, over the last five-year period, while the other global leaders experienced more modest paces of growth.

### **Export Prices by Country**

In 2018, the average pumpkin export price amounted to \$939 per tonne, growing by 1.5% against the previous year. Over the period under review, the pumpkin export price, however, continues to indicate a slight drop. The most prominent rate of growth was recorded in 2017 when the average export price increased by 15% against the previous year. The global export price peaked at \$1,017 per tonne in 2013; however, from 2014 to 2018, export prices stood at a somewhat lower figure.

Prices varied noticeably by the country of origin; the country with the highest price was the Netherlands (\$1,442 per tonne), while Portugal (\$449 per tonne) was amongst the lowest.

From 2013 to 2018, the most notable rate of growth in terms of prices was attained by France, while the other global leaders experienced more modest paces of growth.

### **Imports 2007-2018**

Global imports totaled 1.5M tonnes in 2018, picking up by 19% against the previous year. The total import volume increased at an average annual rate of +4.2% from 2013 to 2018; the trend pattern remained relatively stable, with only minor fluctuations over the period under review. The growth pace was the most rapid in 2018 when imports increased by 19% year-to-year. In that year, global pumpkin imports reached their peak and are likely to continue its growth in the immediate term.

In value terms, pumpkin imports amounted to \$1.4B (IndexBox estimates) in 2018. The total import value increased at an average annual rate of +1.2% from 2013 to 2018; the trend pattern remained relatively stable, with somewhat noticeable fluctuations being recorded throughout the analyzed period. The most prominent rate of growth was recorded in 2018 with an increase of 5.4% against the previous year. In that year, global pumpkin imports attained their peak and are likely to continue its growth in the immediate term.



### Imports by Country

The U.S. was the key importing country with an import of around 508K tonnes, which amounted to 34% of total imports. It was distantly followed by France (159K tonnes), Germany (111K tonnes), the UK (109K tonnes), Japan (103K tonnes) and the Netherlands (68K tonnes), together creating a 37% share of total imports. Canada (55K tonnes), Russia (48K tonnes), Singapore (38K tonnes), Belgium (30K tonnes) and Italy (25K tonnes) occupied a minor share of total imports.

The U.S. was also the fastest-growing in terms of the pumpkin (squash and gourds) imports, with a CAGR of +7.8% from 2013 to 2018. At the same time, Germany (+4.8%), Russia (+4.0%), Canada (+3.4%), France (+1.6%) and the UK (+1.3%) displayed positive paces of growth. The Netherlands, Singapore, Japan and Italy experienced a relatively flat trend pattern. By contrast, Belgium (-4.4%) illustrated a downward trend over the same period. While the share of the U.S. (+11 p.p.) and Germany (+1.5 p.p.) increased significantly, the shares of the other countries remained relatively stable throughout the analyzed period.

In value terms, the U.S. (\$414M) constitutes the largest market for imported pumpkin (squash and gourds) worldwide, comprising 30% of global imports. The second position in the ranking was occupied by France (\$172M), with a 12% share of global imports. It was followed by Germany, with a 11% share.

In the U.S., pumpkin imports expanded at an average annual rate of +3.7% over the period from 2013-2018. The remaining importing countries recorded the following average annual rates of imports growth: France (-1.5% per year) and Germany (+2.5% per year).

### Import Prices by Country

The average pumpkin import price stood at \$921 per tonne in 2018, declining by -11.8% against the previous year. Over the period under review, the pumpkin import price continues to indicate a moderate reduction. The pace of growth appeared the most rapid in 2017 an increase of 18% against the previous year. Over the period under review, the average import prices for pumpkin (squash and gourds) reached their maximum at \$1,067 per tonne in 2013; however, from 2014 to 2018, import prices remained at a lower figure.



There were significant differences in the average prices amongst the major importing countries. In 2018, the country with the highest price was Belgium (\$1,463 per tonne), while Singapore (\$544 per tonne) was amongst the lowest.

From 2013 to 2018, the most notable rate of growth in terms of prices was attained by Italy, while the other global leaders experienced more modest paces of growth.

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