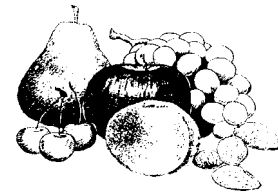


California Fruit & Nut Review



Frequency: Monthly, Except November
Released: March 13, 2003

(USPS 598-290)
VOL. 23 NO. 3



CALIFORNIA AGRICULTURAL
STATISTICS SERVICE

HIGHLIGHTS IN THIS ISSUE:

Fruit and Nut Production	1
Berry Production	2
Final Grape Crush Summary	3
Citrus Production	4

Grape vineyards were pruned throughout the month. Brush was shredded and disced. Orchard and vineyard removal continued. Stumps and brush were piled for burning or chipping. Open ground was prepared for planting of new tree fruit orchards. Strawberry plants were progressing well and nearly ready to bloom in some locations by month's end. Some blueberry plantings were covered with plastic to induce bud break and earlier blooming. Cherry buds started to swell by the end of the month. Pruning, brush shredding, and blooming continued in some olive orchards. Almond orchards were in bloom. Fungicides were applied to protect the blossoms from disease and insect pests. Bees were in place for pollination, but were only active as weather conditions allowed. The Navel orange harvest continued throughout February; sprays to control fungus were applied in some areas. The early variety Valencia orange harvest began in mid-February in some orchards. Grapefruit picking was ongoing in the desert and the San Joaquin Valley. Lemons and Minneola tangelos were picked throughout the month.

FEBRUARY CROP COMMENTS

Seasonal cultural activities such as pruning, grafting, cultivating, irrigating, and dormant spraying continued in orchards and vineyards. Bloom in peach, plum, nectarine, and apricot orchards became more widespread throughout the month due to plentiful sunshine and warm daytime temperatures. Thus, far, no damage from cold nighttime temperatures has been reported. Bee hives were placed in many stone fruit orchards to aid in pollination. Bloom spray applications began in a few early variety stone fruit orchards. Peach orchards were treated for San Jose scale. Pruning of tree fruit orchards continued throughout the month, but was winding down by month's end.

FRUIT AND NUT STATISTICS AT A GLANCE

Crop	Bearing Acreage		Yield Per Acre		Estimated Production		Production Percent Change	Next Crop Update
	2001	2002	2001	2002	2001	2002		
	Acres		Pounds		1,000 Pounds			
NUT CROPS								
Almonds (Shelled) ^{1/}	525,000	530,000	1,580	2,000	830,000	1,060,000	28	May 9, 2003
Pecans	2,600	2,600	1,420	1,380	3,700	3,600	-3	October 10, 2003
Pistachio (In-Shell)								
Marketable In-Shell	---	---	---	---	126,500	240,000		
Shelling Stock	---	---	---	---	34,500	60,000		
Total ^{2/}	78,000	83,000	2,060	3,610	161,000	300,000	86	July 31, 2003
			Tons		1,000 Tons			
Walnuts (In-Shell) ^{3/}	196,000	200,000	1.56	1.41	305.0	282.0	-8	September 3, 2003
FRUIT CROPS								
	Acres				1,000 Tons			
Apples	29,000	26,000	8.97	8.08	260.0	210.0	-19	August 12, 2003
Apricots	18,000	17,000	4.28	5.00	77.0	85.0	10	June 11, 2003
Cherries	25,000	26,000	2.21	2.13	55.3	55.5	N/C	June 11, 2003
Grapes, Raisin ^{4/}	235,000	246,000	9.43	10.80	2,215.0	2,650.0	20	July 11, 2003
Grapes, Table	88,000	88,000	8.10	8.52	713.0	750.0	5	July 11, 2003
Grapes, Wine	480,000	491,000	6.36	6.31	3,051.0	3,100.0	2	July 11, 2003
Grapes, All ^{4/}	803,000	825,000	7.45	7.88	5,979.0	6,500.0	9	July 11, 2003
Olives	36,000	36,000	3.72	2.75	134.0	99.0	-26	August 12, 2003
Peaches, Clingstone	28,800	31,000	16.50	18.10	476.0	562.0	18	May 12, 2003
Peaches, Freestone	39,000	39,000	9.94	10.20	387.5	398.0	3	May 12, 2003
Pears, Bartlett	14,000	13,500	19.60	19.60	275.0	264.0	-4	June 11, 2003
Pears, Other	4,300	4,300	6.98	6.98	30.0	30.0	N/C	August 12, 2003
Prunes (Dried Weight) ^{5/}	86,000	73,000	1.74	2.16	150.0	158.0	5	May 30, 2003
BERRIES								
			Cwt.		1,000 Cwt.			
Strawberries	26,400	28,500	520	595	13,728	16,957	24	April 4, 2003
CITRUS CROPS ^{6/}								
	2001-02	2002-03	2001-02	2002-03	2001-02	2002-03		
			Cartons		1,000 Cartons			
Grapefruit	14,000	13,000	857	862	12,000	11,200	-7	April 10, 2003
Lemons	49,500	50,000	768	920	38,000	46,000	21	April 10, 2003
Oranges, Navel	128,000	127,500	531	627	68,000	80,000	18	April 10, 2003
Oranges, Valencia	66,500	64,000	662	688	44,000	44,000	N/C	April 10, 2003
Tangerines ^{7/}	9,000	9,200	489	543	4,400	5,000	14	April 10, 2003

^{1/} Almond Subjective Forecast Report released May 9 at 12:00 PM. Almond Objective Measurement Report released June 26 at 12:00 PM.

^{2/} Pistachio Objective Measurement Report released July 31 at 12:00 PM.

^{3/} Walnut Objective Measurement Report released September 3 at 12:00 PM.

^{4/} The Raisin Industry Diversion Program (RID) had 41,000 acres in 2001, but 27,000 acres in 2002. These acres were deducted from the bearing acreage.

^{5/} Prune Forecast Report released May 30 at 12:00 PM.

^{6/} Grapefruit -- 33.5 lbs. per carton; Lemons -- 38.0 lbs. per carton; Oranges -- 37.5 lbs. per carton; Tangerines -- 37.5 lbs. per carton.

^{7/} Includes tangelos, tangerines and tangors.

STRAWBERRIES FOR FRESH MARKET AND PROCESSING

Crop and State	Area Planted		Area Harvested		Yield Per Acre		Production		Price Per Cwt.		Total Value	
	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002
	Acres		Cwt.		1,000 Cwt.		Dollars		1,000 Dollars			
California	26,400	28,500	26,400	28,500	520	595	13,728	16,957	60.20	58.40	826,478	990,583
Florida	6,500	6,900	6,500	6,900	260	255	1,690	1,760	99.00	87.20	167,310	153,472
Michigan	1,000	1,000	900	900	56	47	50	42	93.60	90.60	4,682	3,804
New Jersey ^{1/}	500		400		45		18		72.20		1,300	
New York	1,700	1,700	1,600	1,400	38	45	60	63	118.00	140.00	7,080	8,820
North Carolina	1,800	1,900	1,700	1,800	115	125	196	225	85.00	85.00	16,660	19,125
Ohio	1,200	1,300	1,000	1,100	46	35	46	39	105.00	124.00	4,830	4,836
Oregon	3,800	3,500	3,100	3,000	130	115	402	338	37.70	49.20	15,164	16,613
Pennsylvania	1,300	1,300	1,300	1,300	66	56	86	73	110.00	137.00	9,460	10,001
Virginia ^{1/}	500		500		82		41		124.00		5,084	
Washington	1,600	1,800	1,600	1,800	100	90	160	162	43.40	51.00	6,944	8,262
Wisconsin	1,100	1,000	1,000	900	46	48	46	43	110.00	116.00	5,060	4,988
U.S. Total	47,400	48,900	46,000	47,600	359	414	16,523	19,702	64.80	61.90	1,070,052	1,220,504

^{1/} Estimates discontinued in 2002.

BERRIES: ACREAGE, YIELD, PRODUCTION, PRICE AND VALUE BY CROP, STATE AND UNITED STATES, 2000-02

Crop, State and Year		Area Harvested	Yield Per Acre ^{1/}	Total Production	Price Per Pound	Total Value of Production
		Acres	Pounds	1,000 Lbs.	Dollars	\$1,000
Boysenberries						
California	2000	260	9,620	2,500	0.824	2,061
	2001	230	8,260	1,900	0.816	1,550
	2002	210	8,000	1,680	0.817	1,372
Oregon	2000	1,450	4,480	6,500	0.487	3,164
	2001	1,380	2,970	4,170	0.630	2,583
	2002	1,380	2,170	3,030	0.590	1,770
United States	2000	1,710	5,260	9,000	0.581	5,225
	2001	1,610	3,730	6,070	0.689	4,133
	2002	1,590	2,940	4,710	0.671	3,142
Black Raspberries						
Oregon	2000	1,150	3,300	3,830	1.480	5,687
	2001	1,200	3,180	3,950	0.452	1,724
	2002	1,100	2,470	2,820	0.411	1,119
Red Raspberries						
Oregon	2000	2,900	5,000	14,500	0.532	7,712
	2001	2,700	5,890	15,900	0.513	8,156
	2002	2,500	4,680	11,700	0.716	8,374
Washington	2000	9,500	7,500	72,150	0.363	25,888
	2001	9,500	7,900	76,050	0.503	37,784
	2002	9,500	7,800	74,100	0.499	36,985
United States	2000	12,400	6,920	86,650	0.392	33,600
	2001	12,200	7,450	91,950	0.505	45,940
	2002	12,000	7,150	85,800	0.529	45,359
All Raspberries						
California	2000	2,000	11,300	22,600	1.900	42,940
	2001	2,300	10,800	24,800	1.660	41,168
	2002	2,400	11,900	28,600	1.400	40,005

^{1/} Yields based on utilized production.

FINAL GRAPE CRUSH REPORT

The 2002 crush totaled 3,787,139 tons, up 12 percent from the 2001 crush of 3,368,265 tons. Red wine varieties accounted for the largest share of all grapes crushed, at 1,816,716 tons, up 6 percent from 2001. The 2002 white wine variety crush totaled 1,287,865 tons, down 1 percent from 2001. Tons crushed of raisin type varieties totaled 621,928, up 138 percent from 2001, while tons crushed of table type varieties totaled 60,629 down 40 percent from 2001.

Beginning with the 1999 season, the Grape Crush Report includes the total number of tons crushed that will be marketed as grape concentrate. In determining grape tonnage crushed for concentrate production, each processor was required to report the estimated equivalent tons of grapes crushed that are expected to be marketed as grape concentrate. For the 2002 season, this total was 752,295 tons, approximately 20 percent of the 2002 grape crush total. This report provides only the aggregate figure for grapes crushed for concentrate production and does not include information by district, type, or variety.

California grape growers received prices in 2002 for raisin, table, white and red wine grapes that were, on average, less than the 2001 prices. The 2002 average price of all varieties was \$461.82, down 17 percent from 2001. Average prices for the 2002 crop by type were as follows: red wine grapes, \$613.33, down 10 percent from 2001; white wine grapes, \$431.43, down 12 percent from 2001; raisin grapes, \$75.51, down 12 percent; and table grapes, \$80.49, down 8 percent. These price levels have not been adjusted for inflation.

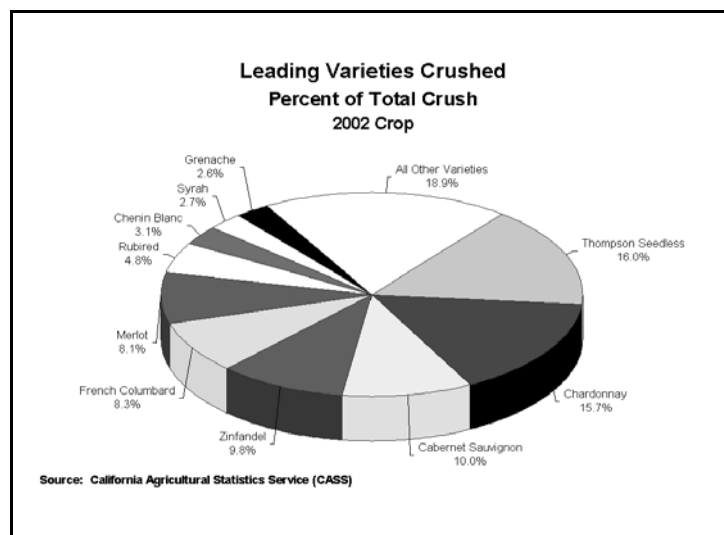
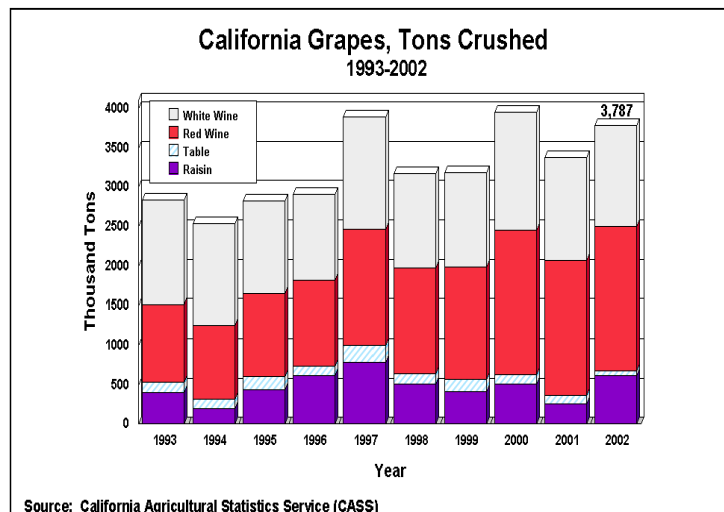
LEADING GRAPE VARIETIES AND DISTRICTS

In 2002, Thompson Seedless accounted for the largest percentage of crush volume with 16.0 percent. Chardonnay accounted for the second leading percentage of crush with 15.7 percent of the total crush. The next eight highest percentages of grapes crushed were all wine varieties.

Grapes produced in District 4 (Napa County) received the highest average price of \$2,942.39 per ton, up 4 percent from 2001. District 3 (Sonoma and Marin counties) received the second highest return of \$2,055.39, down 5 percent from 2001. Of the grapes grown Statewide, Graciano received the highest average price of \$2,733.33 *a/* per ton followed by Aleatico with \$2,646.00 *a/* per ton. Vernaccia received the third highest average price of \$2,141.85 *a/* per ton followed by Negrette with \$2,118.95 *a/* per ton and Melon with \$2,058.93 *a/* per ton.

The 2002 Chardonnay price of \$682.64 was down 19 percent from 2001, while the 2002 Cabernet Sauvignon price of \$1,026.48 was down 4 percent from 2001. The 2002 average price for Merlot and Zinfandel grapes decreased to \$859.18 and \$476.05, down 15 percent and 10 percent from 2001, respectively.

a/ These purchases involved less than 50 tons.



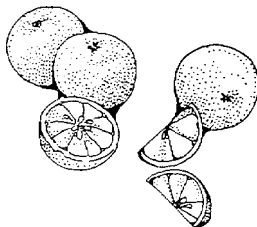
CALIFORNIA GRAPE CRUSH TONNAGE AND PRICE, 1988-02

Crop Year	Raisin Type		Table Type		Red Wine Type		White Wine Type		All Types	
	Tons (1,000)	Dollars Per Ton	Tons (1,000)	Dollars Per Ton	Tons (1,000)	Dollars Per Ton	Tons (1,000)	Dollars Per Ton	Tons (1,000)	Dollars Per Ton
1988	415	116	312	131	760	409	1,356	238	2,843	253
1989	370	132	211	128	872	410	1,272	297	2,725	297
1990	268	126	170	127	804	355	1,331	277	2,573	276
1991	284	150	157	141	840	383	1,289	319	2,570	310
1992	785	182	217	170	888	438	1,209	364	3,099	325
1993	452	152	137	147	979	430	1,327	316	2,895	323
1994	239	118	123	136	936	462	1,242	317	2,540	344
1995	432	164	170	162	1,052	515	1,175	351	2,829	372
1996	618	191	117	188	1,079	611	1,094	469	2,908	452
1997	786	185	212	169	1,461	656	1,433	546	3,891	497
1998	506	164	135	150	1,333	643	1,194	521	3,169	502
1999	419	200	149	187	1,422	649	1,195	518	3,185	525
2000	513	125	120	118	1,816	628	1,503	500	3,951	504
2001	262	86	101	87	1,706	680	1,300	491	3,368	555
2002	622	76	61	80	1,817	613	1,288	431	3,787	462

Source: California Agricultural Statistics Service (CASS)

FLORIDA CITRUS COMMENTS

February was generally a very dry month with mild temperatures. Most areas reported around an inch of rain, which is around half of normal. Growers and caretakers irrigated during the month to keep groves and trees in good condition. During the last two weeks of the month, new growth and bloom buds started showing on the younger trees and gradually the older trees were also covered with all sizes of little buds. All of this new growth and bloom bud formation is very vulnerable to frost or freezing temperatures should either arrive. Harvest of early and mid-season oranges declined during the month with very little of the early fruit remaining on the first of March. Harvesting crews have started picking Valencia oranges for both fresh and processing. Some growers are moving into the Valencia orchards to keep the pickers active. Fresh grapefruit and Honey tangerine shipments were a little slow at the first of the month, but are presently getting a little more active. Tangelo and early tangerine harvests are all just about complete for this season. Caretakers have been very busy keeping cover crops cut for fire protection and to help generate new growth for the up coming bloom cycle. Hedging and topping have been reported in harvested groves in all areas. Dead trees are being cut out and burned in all areas. Pre-bloom fertilizations and sprays are almost complete.



CITRUS FRUIT PRODUCTION

Crop & State	2000-01	2001-02	Forecast 2002-03
	1,000 Cartons		
ORANGES: 1/			
California, All	109,000	112,000	124,000
Navel & Misc.	71,000	68,000	80,000
Valencia	38,000	44,000	44,000
Florida	446,600	460,000	398,000
Texas	4,470	3,480	3,360
Arizona	1,800	1,040	900
ALL U.S. ORANGES	561,870	576,520	526,260
GRAPEFRUIT: 2/			
California, All	12,600	12,000	11,200
Florida	92,000	93,400	80,000
Texas	14,400	11,800	11,200
Arizona	500	320	200
ALL U.S. GRAPEFRUIT	119,500	117,520	102,600
LEMONS: 3/			
California	45,200	38,000	46,000
Arizona	7,200	5,600	5,600
ALL U.S. LEMONS	52,400	43,600	51,600
TANGERINES: 4/			
California 5/	4,400	4,400	5,000
Florida	11,200	13,200	10,000
Arizona	1,300	1,240	900
ALL U.S. TANGERINES	16,900	18,840	15,900

- 1/ ORANGES: California and Arizona, 1 carton = 37.5 lbs.; Florida, 1 carton = 45 lbs.; Texas, 1 carton = 42.5 lbs.
- 2/ GRAPEFRUIT: Arizona, 1 carton=32 lbs.; California, 1 carton = 33.5 lbs.; Florida, 1 carton = 42.5 lbs.; Texas, 1 carton = 40 lbs.
- 3/ LEMONS: All, 1 carton = 38 lbs.
- 4/ TANGERINES: California and Arizona, 1 carton = 37.5 lbs.; Florida, 1 carton = 47.5 lbs.
- 5/ Includes tangelos, tangerines, and tangors.