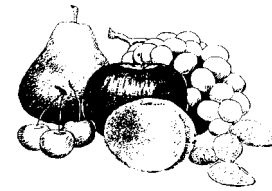


# California Fruit & Nut Review



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## AUGUST CROP COMMENTS

Fruit growers conducted cultural activities that included weed control, fungicide applications, and irrigation of trees and vines. Stone fruit harvest remained active throughout the month as later varieties reached maturity. O'Henry, Snow King, and Summer Lady peaches, Friar and Royal Diamond plums, Summer Fire and Red Jim nectarines, Moyer prunes, and Flavorich pluots were harvested. Granny Smith and Gala apples and Bartlett and Hosui Asian pears were also harvested. Early foothill pomegranates were maturing well and showing excellent color. Harvesting of the Granada variety was underway by month's end. Persimmons were sizing well. Harvest of table grapes continued in the San Joaquin Valley. Black Marroo, Black Emerald, Rose Ito and Crimson Seedless varieties were harvested. Vineyards testing

with high sugar content were harvested for grape juice concentrate production. Wine grape harvest began in August and gathered momentum by the end of the month. Grapes for raisins were laid down on trays. Cane cutting was underway in some dried on the vine raisin vineyards. Fungicides were applied in some grape vineyards due to unexpected rains during the third week of August. Many strawberry fields already prepared for fall planting were ready and waiting for cooler weather. Treatments for fruit fly continued in olive orchards. Almond harvesting was active throughout the State by month's end. Trees were shaken, and nuts were raked into windrows, picked up, and hauled to processors. Rains late in the month in some locations slowed processing and increased drying time. Sunburn damage was evident in some walnut orchards by the first week in August. Walnuts, pistachio and pecan growers were preparing their orchards for harvest by month's end. Valencia orange harvest remained slow throughout the month as the end of the season draws near. Harvest of Marsh Ruby grapefruit continued in the southern coastal areas of the State. Lemons were harvested in the coastal areas of Southern California with earlier maturity and larger sizes noted. New crop Navel oranges were sizing well.

## FRUIT AND NUT STATISTICS AT A GLANCE

Crop	Bearing Acreage		Yield Per Acre		Estimated Production		Production Percent Change	Next Crop Update
	2002	2003	2002	2003	2002	2003		
<b>NUT CROPS</b>	Acres		Pounds		1,000 Pounds			
Almonds (Shelled)	530,000	530,000	2,060	1,890	1,090,000	1,000,000	-8	January 2004
Pecans	2,600	---	1,380	---	3,600	---		October 10, 2003
Pistachio (In-Shell)								
Marketable In-Shell	---	---	---	---	242,000	---		
Shelling Stock	---	---	---	---	61,000	---		
Total	83,000	88,000	3,650	2,050	303,000	180,000	-41	January 2004
Walnuts (In-Shell)	200,000	205,000	Tons		1,000 Tons		12	January 2004
			1.41	1.54	282.0	315.0		
<b>FRUIT CROPS</b>								
Apples	26,000	26,000	9.04	9.81	235.0	255.0	9	January 2004
Apricots	17,000	16,500	5.00	5.15	85.0	85.0	N/C	January 2004
Cherries	26,000	27,000	2.13	2.22	55.5	60.0	8	January 2004
Grapes, Raisin <sup>1/</sup>	246,000	255,000	11.50	9.80	2,833.0	2,500.0	-12	October 10, 2003
Grapes, Table	88,000	89,000	8.40	8.31	739.0	740.0	N/C	October 10, 2003
Grapes, Wine	486,000	479,000	6.48	6.37	3,149.0	3,050.0	-3	October 10, 2003
Grapes, All	820,000	823,000	8.20	7.64	6,721.0	6,290.0	-6	October 10, 2003
Olives	36,000	36,000	2.86	3.19	103.0	115.0	12	January 2004
Peaches, Clingstone	31,000	31,300	18.10	18.80	562.0	590.0	5	January 2004
Peaches, Freestone	39,000	39,000	10.20	9.87	398.0	385.0	-3	January 2004
Pears, Bartlett	13,500	12,500	17.20	17.60	232.0	220.0	-5	January 2004
Pears, Other	4,300	4,300	6.98	6.98	30.0	30.0	N/C	January 2004
Plums, Dried <sup>2/</sup>	74,000	72,000	2.31	2.64	171.0	190.0	11	January 2004
<b>BERRIES</b>			Cwt.		1,000 Cwt.			
Strawberries	28,500	29,600	595	600	16,957	17,760	5	December 11, 2003
<b>CITRUS CROP <sup>3/</sup></b>	2001-02	2002-03	2001-02	2002-03	2001-02	2002-03		
			Cartons		1,000 Cartons			
Grapefruit	14,000	13,000	843	862	11,800	11,200	-5	October 10, 2003
Lemons	49,500	49,000	739	980	36,600	48,000	31	October 10, 2003
Oranges, Navel	128,000	127,500	500	643	64,000	82,000	28	October 10, 2003
Oranges, Valencia	65,000	64,000	600	656	39,000	42,000	8	October 10, 2003
Tangerines <sup>4/</sup>	9,000	9,200	489	543	4,400	5,000	14	October 10, 2003

<sup>1/</sup> The Raisin Industry Diversion Program (RID) had 27,000 acres enrolled for 2002, but zero acreage in 2003. RID acreage is deducted from bearing acreage

<sup>2/</sup> Forecast carried forward from June 2003.

<sup>3/</sup> Grapefruit - 33.5 lbs. per carton, Lemons - 38.0 lbs. per carton, Oranges - 37.5 lbs. per carton, Tangerines - 37.5 lbs. per carton.

<sup>4/</sup> Includes tangelos, tangerines, and tangors.

**CALIFORNIA NAVEL ORANGE FORECAST**

The initial 2003-04 Navel orange forecast is 78.0 million (37.5-pound) cartons, 5 percent below last season's crop of 82.0 million cartons. Of the total forecast, 76.0 million cartons are estimated to be in the Central Valley.

Survey data indicated an average fruit set of 358 oranges per tree, with a September 1 diameter of 2.410 inches.

**CALIFORNIA CENTRAL VALLEY NAVEL ORANGES 1/**

Crop Year 2/	Final Utilized Production 3/ (37.5-Lb. Cartons)	Bearing Acres	Average Trees Per Acre	Average Set Per Tree	Average September 1 Diameter 4/ (Inches)	Average March 1 Diameter 4/ 5/ (Inches)
1986-87	58,566,000	94,997	128	544	2.169	2.847
1987-88	53,588,000	96,110	126	361	2.343	3.195
1988-89	58,326,000	98,766	126	570	2.195	2.761
1989-90	79,242,000	101,525	125	541	2.250	2.820
1990-91	25,514,000	104,560	124	498	2.213	---
1991-92	60,406,000	102,000	124	---	---	---
1992-93	81,034,000	102,612	121	572	2.296	3.021
1993-94	63,800,000	106,381	121	452	2.365	3.090
1994-95	66,358,000	107,049	121	457	2.232	3.063
1995-96	69,750,000	113,000	121	460	2.258	2.994
1996-97	71,700,000	115,000	121	359	2.470	3.208
1997-98	81,000,000	116,500	121	407	2.481	3.195
1998-99	37,000,000	118,000	121	380	2.184	---
1999-00	76,000,000	119,000	122	458	2.224	3.049
2000-01	68,000,000	122,000	122	347	2.311	3.120
2001-02	65,000,000	122,000	122	264	2.483	3.172
2002-03	79,000,000	122,500	122	466	2.200	3.000
2003-04	76,000,000	123,000	124	358	2.410	3.210

- 1/ Data for final utilized production and bearing acres are from the orange industry. Acreage data are the number of acres with trees of bearing age (more than four years old). Some fruit could have been picked from trees younger than four years old, but not enough to consider the tree full-bearing.
- 2/ Data for 1990-91 and 1998-99 (freeze years) were not used in forecasting the 2002-03 crop. An Objective Measurement Survey was not conducted for the 1991-92 season due to lack of funding.
- 3/ California Agricultural Statistics Service preliminary forecast for 2002-03.
- 4/ Size data for 1984-85 through 1993-94 are from the Navel Orange Administrative Committee, while the data since 1993-94 are from the orange industry.
- 5/ Data for 2002-03 and 2003-04 were derived using the five-year average growth size from the orange industry.

**PISTACHIO PRODUCTION FORECAST**

California pistachio production for 2003 is forecast at 180 million pounds. The 80 percent confidence interval is from 150 to 210 million pounds. This means that the results of our sampling procedures will encompass the true mean 80 percent of the time.

This forecast is based on an objective measurement survey conducted by the California Agricultural Statistics Service (CASS) under the sponsorship of the California Pistachio Commission (CPC). The survey collects data such as clusters per tree, nuts per cluster and percent of bearing trees.

**CALIFORNIA PISTACHIO OBJECTIVE MEASUREMENT SURVEY DATA -- STATE TOTALS, 1993-2003 1/**

Year	Samples Completed 2/	Estimated Average Number Of Clusters Per Tree	Estimated Percent Of All Spaces That Contain		Count Data			In-Hull Data 3/			Kernel Data 3/			
			Bearing Trees	Pollinators	Nuts Per Cluster (Filled and Blank)	Percent Of Nuts Filled	Est. Total Number Of Filled Nuts Per Tree	Weight Per Nut (Includes Blanks)	Weight Per Nut (Filled)	In-Hull Cross Suture	Average Weight Per Kernel	Suture	Cross Suture	Length
1993	---	---	---	---	---	---	---	---	---	---	---	---	---	---
1994	491	797	87.4	6.0	11.9	80.6	7,647	2.92	---	15.02	0.952	10.43	9.68	16.97
1995	586	974	89.9	5.4	9.2	78.9	7,114	3.07	3.26	15.51	0.949	10.33	9.94	16.40
1996	562	739	89.3	5.3	10.3	65.7	5,007	2.52	2.72	14.87	0.775	9.76	9.08	15.70
1997	642	1,049	89.5	5.4	10.4	76.0	8,326	2.78	2.92	14.92	0.896	10.56	9.60	16.55
1998	610	895	90.9	5.0	13.8	77.2	9,542	2.86	3.04	15.05	0.828	10.31	9.51	16.48
1999	603	591	90.5	5.6	11.1	70.4	4,630	2.82	3.09	15.29	0.928	10.16	9.78	16.72
2000	555	992	92.8	4.5	13.0	72.2	9,321	2.57	2.84	14.86	0.870	10.01	9.33	16.25
2001	632	805	92.6	5.2	12.0	70.0	6,737	2.87	3.13	15.59	1.020	10.52	9.99	16.71
2002	623	1,108	94.0	4.7	13.8	71.9	11,009	2.65	2.80	14.46	0.889	10.16	9.35	16.34
2003	636	461	93.4	4.8	20.6	---	---	---	---	14.22	---	---	---	---

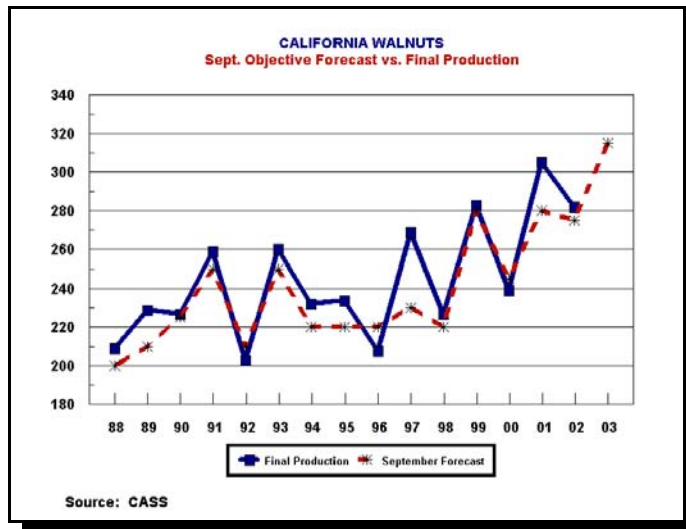
- 1/ Survey was not conducted in 1993. Sizing data not available in 2003.
- 2/ Number of samples is based on the Pistachio Objective Measurement Survey. There are two trees per sample.
- 3/ All weights are in grams. Suture, cross suture and length measurements are in millimeters.

**WALNUT PRODUCTION FORECAST**

The 2003 California walnut production is forecast at a record 315,000 tons, up 12 percent from 2002's production of 282,000 tons. This forecast is based on the 2003 Walnut Objective Measurement (O.M.) Survey, which was conducted August 1 through August 25, 2003.

The 2003 Walnut O.M. Survey utilized a total of 686 blocks with two sample trees per block. Survey data indicated an average nut set of 1,599, up 2 percent from 2002's average of 1,572. The Hartley nut set was down 12 percent; Chandler, was up 21 percent; Serr, was up 33 percent; Franquette, was down 42 percent from 2002. Percent of sound kernels in-shell was 97.0 percent Statewide. In-shell weight per nut was 22.4 grams, while the average in-shell suture measurement was 32.5 millimeters. The average length in-shell was 39.1 millimeters.

Estimated nut sets, sizing measurements, average number of trees per acre, and estimated bearing acreage were used in the regression formulas.



**CALIFORNIA WALNUT OBJECTIVE MEASUREMENT SURVEY DATA – NUTS SET PER TREE BY DISTRICT**

Year	Coast <u>1/</u>	Sacramento Valley <u>2/</u>	San Joaquin Valley <u>3/</u>	State <u>4/</u>
1992	1,567	1,902	1,380	1,604
1993	1,530	2,703	1,596	2,068
1994	1,813	1,961	1,602	1,773
1995	1,420	2,253	1,451	1,777
1996	1,362	1,836	1,497	1,630
1997	1,128	2,233	1,439	1,753
1998	1,070	1,654	1,253	1,407
1999	1,355	2,180	1,250	1,709
2000	1,195	1,812	1,204	1,483
2001	937	2,020	1,478	1,719
2002	1,254	1,982	1,142	1,572
2003	640	1,846	1,429	1,599

- 1/ Coast includes: Contra Costa, Lake, Monterey, Napa, San Benito, San Luis Obispo, Santa Clara, and Sonoma counties.
- 2/ Sacramento Valley includes: Butte, Colusa, El Dorado, Glenn, Sacramento, Solano, Sutter, Tehama, Yolo, and Yuba counties.
- 3/ San Joaquin Valley includes: Fresno, Kern, Kings, Madera, Merced, San Joaquin, Stanislaus, and Tulare counties.
- 4/ District and State averages are derived by weighting county averages by county bearing acreage figures.

**CALIFORNIA WALNUT OBJECTIVE MEASUREMENT SURVEY DATA -- STATE TOTALS**

Year	Bearing Acres	Total Production Tons	Kernel Grade - Percent Sound	In-Shell			
				Weight	Width	Length	Cross-Width
				gm	mm		
1992	178,000	203,000	96.9	22.7	32.6	39.5	32.9
1993	185,000	260,000	95.8	22.9	32.6	40.0	32.5
1994	189,000	232,000	95.6	22.1	32.2	39.4	32.2
1995	193,000	234,000	93.1	20.8	31.7	39.2	31.3
1996	192,000	208,000	94.4	22.1	32.3	39.0	32.5
1997	193,000	269,000	97.3	22.9	32.3	38.6	32.6
1998	193,000	227,000	94.4	21.4	31.9	39.5	31.8
1999	191,000	283,000	97.9	23.0	32.2	39.4	32.7
2000	193,000	239,000	96.9	21.2	32.2	38.2	32.8
2001	196,000	305,000	97.8	21.5	31.7	38.3	31.6
2002	200,000	282,000	96.3	22.0	32.4	38.5	32.7
2003 <u>1/</u>	205,000	315,000	97.0	22.4	32.5	39.1	32.4

1/ Bearing years include plantings of the following: Chandler, Chico, Howard, Tulare (1999 & Earlier); 50-55, 59-124, 4946, Amigo, Ashley, Bardoni, Cisco, Earhorn, Grove, Gustine, Honeycutt, Houston, Jensen, Lompoc, Marchetti, Nuggett, Payne, Pedro, Serr, Sunland, Tehama, Trinta, UCD 67-13, Vina, Westside (1998 and Earlier); Franquette, Franquette Scharsch, Mayette, Placentia, Poe, Willsons/Willsons Wonder, Woodland (1996 & Earlier); all other varieties not specified (1997 & Earlier).

## FLORIDA CITRUS

August was marked by moderate temperatures, high humidity, and above average rainfall. Temperatures were held to moderate levels by almost daily rains and high humidity. Temperatures rarely reached 95 degrees during August. Rainfall was above average in all citrus growing areas with some reporting stations receiving twice the monthly average. Rainfall accumulations for the calendar year were above normal levels in all areas. Coastal area accumulations exceeded interior areas with some stations reporting up to 10 inches more. Only one organized weather system affected the State, bringing heavy rainfall. Citrus crops in all areas made excellent progress with no major problems reported. Trees were reported in excellent condition. Steady rainfall, with no dry spells,

prevented fruit split from occurring. Good to excellent fruit sizes were reported. Fresh fruit crops were sprayed regularly to hold down insect populations. Some crops on the East Coast received weekly treatments. Growers and caretakers conducted routine summer cultural practices that included weed control and dead tree removal and replacement. In the flat woods and coastal areas, maintenance of ditches and canals to move excess water out of the groves and away from tree roots was a priority. Near the end of the month, some fresh fruit packing houses were field-testing Navels, Ambersweet oranges, grapefruit, and Fallglo tangerines to identify crops for September harvest.