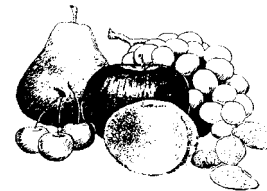


California Fruit & Nut Review



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HIGHLIGHTS IN THIS ISSUE:

January Crop Comments --- Forecast Calendars	1
Fruit and Nut Acreage, Production, Price and Value . . .	2
Preliminary Grape Crush Report Summary	3
Citrus Fruit	1 & 4

FLORIDA CITRUS

Weather patterns over Florida's citrus producing areas were generally typical for January, with cool nights and moderate daytime temperatures. Cold fronts that passed through the State on several mornings were the only exception. Each one brought varying amounts of rainfall and morning low temperatures that were in the mid-to-low 30's for some locations and only the mid 40's in others. Moderate frost on the ground was reported on several mornings in northern locations and to a lesser degree in central locations, especially near the end of the month. No frost in the trees nor damage or loss of any kind was reported. Daytime high temperatures were generally in the 50's following the passage of cold fronts, while on some days it warmed to the 70's or low 80's. Rainfall patterns were also typical with most occurring prior to the passage of a cold front. The second and last weeks of the month brought the most rainfall. During the second week, up to 1.8 inches was reported by one station, while the last week brought rainfall amounts up to 1.5 inches in a slow moving low-pressure system that moved over the State.

Picking of early-mid season oranges peaked in January when weekly harvest reached more than 9.00 million boxes in a two-week period. Navel orange harvest decreased during the month and shipments were cut short by crystallization in larger sizes, which decreased the value for fresh utilization. Harvest is beginning for small amounts of Valencia oranges, primarily for fresh shipments. Grapefruit harvest for fresh shipments increased during the month, with harvest for processing increasing near the end of the month. As harvest of Sunburst tangerines decreases, harvest of Honey tangerines increases, with excellent fruit sizes and color being reported. Tangelo harvest is nearing completion, while Temple harvest for fresh and processing usage is heavy.

JANUARY CROP COMMENTS

Seasonal cultural activities such as pruning, grafting, cultivating, and dormant spraying continued in orchards and vineyards. Ground preparations for young trees were underway as weather permitted. Buds on stone fruit trees showed earlier than normal signs of swelling. Some tree fruit growers began placement of pheromone dispersal devices to disrupt the mating cycles of insect pests. Pruning, cane tying, and brush shredding continued in wine, raisin, and table grape vineyards. Vineyard cover crops were growing at a steady rate. Removal of old, unproductive, or unprofitable orchards and vineyards continued. Foliar fertilizer and scale treatments were applied to cherry trees in the San Joaquin Valley. Strawberry plants were showing new growth in many locations, but could benefit from sunny, warmer temperatures. New strawberry fields were planted in the Kerman District. Avocado maturity was advancing, with Zutanos and Hass varieties being packed. Olive groves were pruned and suckered. Cultural activities continued in many tree nut orchards as weather permitted. The freezing weather ensured dormancy in pistachio orchards. Rainy, wet conditions slowed the harvest of Navel oranges and other citrus fruit. Navels did not suffer serious internal damage from frost, but ice marks started to show up in many orchards. Mandarin picking began winding down. Lemon harvest continued. Grapefruit, tangerines, Satsumas, Clementines, and pummelos were also harvested.

CALIFORNIA CITRUS CROPS FORECAST MONTHS, 2003-04 CROP SEASON

CROPS	SEPT.	OCT.	DEC.	JAN.	FEB.	MAR.	APR.	MAY	JUNE	JULY
Grapefruit		X		X			X			X
Lemons		X		X			X			X
Oranges, Navel	<u>1/</u>			X			X			X
Oranges, Valencia		X		X		<u>2/</u>	X			X
Tangerines		X		X			X			X

1/ Navel Objective Measurement was released September 11, 2003. 2/ Valencia Objective Measurement tentative release March 10, 2004.

CALIFORNIA NON CITRUS CROPS FORECAST MONTHS, 2004 CROP SEASON

CROPS	MAY	JUNE	JULY	AUGUST	SEPT.	OCT.	END OF YEAR
Apples				X			X
Apricots		X	X				X
Avocados							X
Cherries		X					X
Dates							X
Figs							X
Grapes, Raisin			X	X		X	X
Grapes, Table			X	X		X	X
Grapes, Wine			X	X		X	X
Kiwifruit							X
Nectarines							X
Olives				<u>1/</u>			X
Peaches, Clingstone	X	X	X				X
Peaches, Freestone	X	X	X				X
Pears, Bartlett		X		X			X
Pears, Other				X			X
Plums							X
Plums, Dried (Prunes)		<u>2/</u>					X
Almonds	<u>3/</u>	<u>4/</u>					X
Pecans						X	X
Pistachios			<u>5/</u>				X
Walnuts						<u>6/</u>	X

1/ Olive Probability Survey released August 12, 2004. 2/ Plums, Dried (Prunes) Probability Survey released June 4, 2004. 3/ Almond Subjective Forecast Report released May 11, 2004. 4/ Almond Objective Measurement tentative release June 30, 2004. 5/ Pistachio Objective Measurement tentative release July 30, 2004. 6/ Walnut Objective Measurement tentative release September 2, 2004.

CALIFORNIA NUTS: ACREAGE, PRODUCTION, PRICE AND VALUE, 2002-03

Crop	Year	Bearing Acreage	Yield		Value of Utilized Production	
			Per Bearing Acre	Total Production	Grower Return	Total Value
			Pounds	Million Pounds	Dollars Per Pound	\$1,000
Almonds, Shelled <u>1/</u>	2002	530,000	2,060	1,090.0	1.11	1,200,687
	2003	530,000	1,920	1,020.0	1.42	1,419,432
Pistachios, In-Shell	2002	83,000	3,650	303.0	1.10	333,300
	2003	88,000	1,320	116.0	1.15	133,400
Pecans, In-Shell	2002	2,600	1,460	3.8	1.27	4,826
	2003	2,600	1,380	3.6	1.19	4,284
			Tons	Thousand Tons	Dollars/Ton	\$1,000
Walnuts, In-Shell <u>2/</u>	2002	200,000	1.41	282,000	1,080	304,560
	2003	205,000	1.59	325,000	N/A	N/A

1/ Price and value are based on the edible portion of the crop only. Production includes inedible quantities of no value as follows:
2002 - 8.30 million pounds and 2003 - 20.0 million pounds.

2/ Grower return and total value for the 2003 crop year will be released July 7, 2004.

CALIFORNIA NON-CITRUS FRUITS: ACREAGE, PRODUCTION, PRICE AND VALUE, 2002-03

Crop	Year	Bearing Acreage	Yield		Value of Utilized Production	
			Per Bearing Acre	Total Production	Price Per Ton	Total Value
			Tons	Thousand Tons	Dollars	\$1,000
Apples	2002	26,000	9.04	235.0	408	93,840
	2003	26,000	8.85	230.0	338	77,510
Apricots	2002	17,000	5.00	85.0	306	22,964
	2003	16,500	5.61	92.5	316	29,225
Avocados	2001-02	58,000	3.45	200.0	1,790	358,000
	2002-03	58,500	2.94	172.0	2,170	373,240
Cherries, Sweet	2002	26,000	2.13	55.5	1,740	93,315
	2003	27,000	2.30	62.0	1,590	95,431
Dates	2002	5,000	4.84	24.2	1,550	37,510
	2003	4,800	4.04	19.4	1,430	27,742
Figs	2002	13,500	3.94	53.2	329	17,526
	2003	13,000	3.58	46.5	475	22,076
Grapes, All	2002	820,000	8.17	6,696.0	383	2,566,918
	2003	823,000	6.91	5,690.0	402	2,257,275
Raisin Type	2002	246,000	11.40	2,804.0	152	425,838
	2003	255,000	8.24	2,100.0	176	365,688
Table Type	2002	88,000	8.44	743.0	616	457,628
	2003	89,000	7.75	690.0	619	393,487
Wine Type	2002	486,000	6.48	3,149.0	535	1,683,452
	2003	479,000	6.05	2,900.0	517	1,498,100
Kiwifruit <u>1/</u>	2002	4,500	5.80	26.1	783	18,097
	2003	4,500	5.27	23.7	N/A	N/A
Nectarines	2002	36,500	8.22	300.0	382	114,600
	2003	36,500	7.62	278.0	436	121,208
Olives	2002	36,000	2.86	103.0	573	58,983
	2003	36,000	3.28	118.0	426	50,305
Peaches, All <u>2/</u>	2002	70,000	13.70	960.0	290	271,008
	2003	70,000	13.40	935.0	268	241,792
Clingstone <u>3/</u>	2002	31,000	18.10	562.0	248	132,639
	2003	31,000	17.30	536.0	216	108,683
Freestone	2002	39,000	10.20	398.0	348	138,369
	2003	39,000	10.20	399.0	334	133,109
Pears, All	2002	17,300	15.10	262.0	261	68,270
	2003	16,800	13.80	231.0	232	53,564
Bartlett	2002	13,000	17.80	232.0	242	56,120
	2003	12,500	16.10	201.0	221	44,490
Other Than Bartlett	2002	4,300	6.98	30.0	405	12,150
	2003	4,300	6.98	30.0	302	9,074
Plums	2002	36,000	5.58	201.0	386	77,586
	2003	36,000	5.89	212.0	418	88,616
Plums, Dried (Prunes)	2002	74,000	2.32	172.0	810	132,030
	2003	72,000	2.44	176.0	730	117,530
Berries,		Harvested Acreage	Cwt.	Thousand Cwt.	Price Per Cwt.	
Boysenberries	2002	210	81.00	17.0	81.60	1,388
	2003	200	60.00	12.0	89.10	1,069
Raspberries	2002	2,400	122.00	292.0	140.00	40,851
	2003	2,500	124.00	310.0	208.00	64,480
Strawberries	2002	28,500	565.00	16,097.0	57.90	931,649
	2003	29,600	620.00	18,352.0	61.00	1,118,802

1/ Price per ton and total value for the 2003 crop year will be released July 7, 2004.

2/ All peach price is weighted average of Freestone price and Clingstone grower return by utilized production. See footnote 3/.

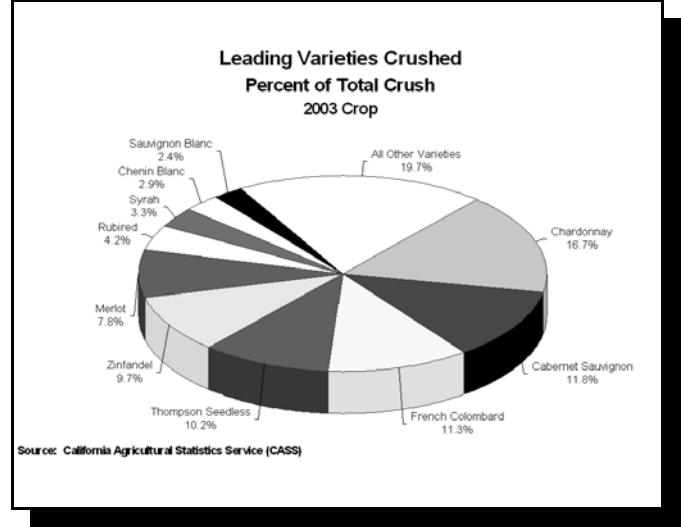
3/ The price published is the grower return and used to calculate value using utilized production.

PRELIMINARY GRAPE CRUSH REPORT

The 2003 crush totaled 3,366,143 tons, down 11 percent from the 2002 crush of 3,786,831 tons. Red wine varieties accounted for the largest share of all grapes crushed, at 1,643,825 tons, down 10 percent from 2002. The 2003 white wine variety crush totaled 1,301,092.2 tons, up 1 percent from 2002. Tons crushed of raisin type varieties totaled 350,858, down 44 percent from 2002, while tons crushed of table type varieties totaled 70,368, up 16 percent from 2002. (See chart below.)

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 2003 season, this total was 395,885 tons, approximately 12 percent of the 2003 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.

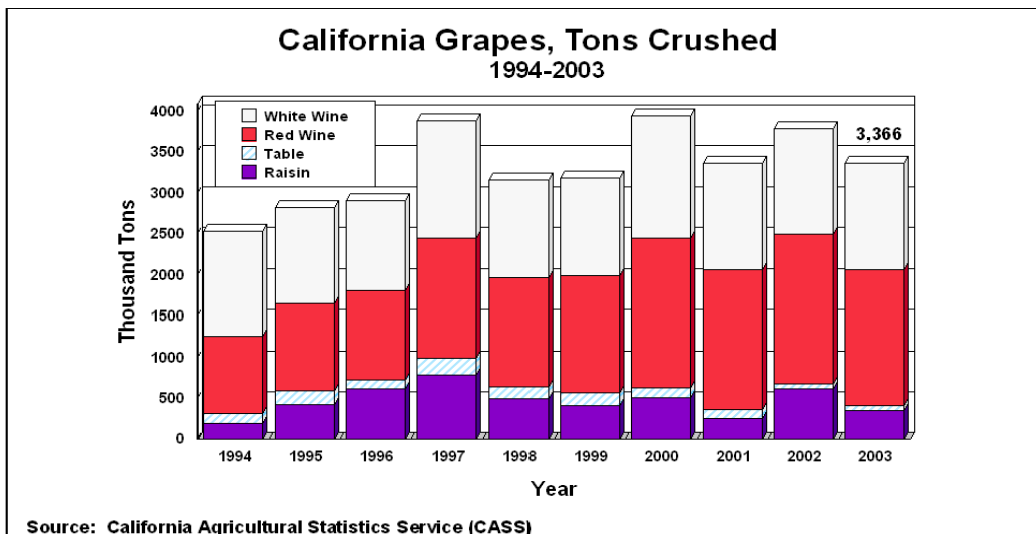
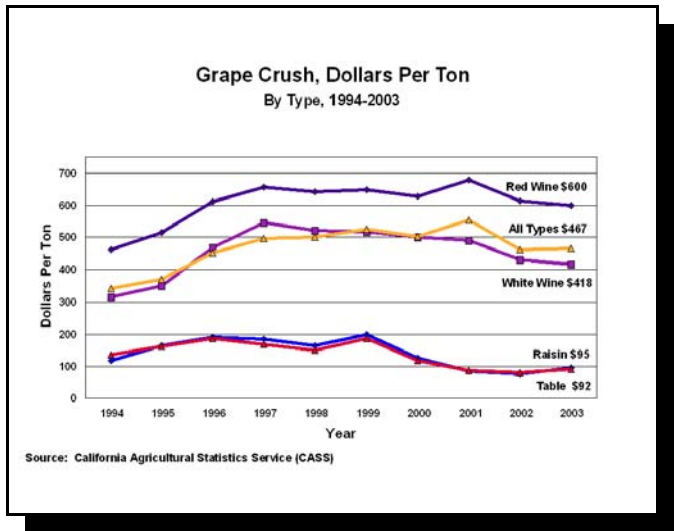
California grape growers received prices in 2003 for raisin and table grapes that were, on average, above the 2002 prices, while the prices received for red and white wine grapes were, on average, below the 2002 prices. The 2003 average price of all varieties was \$466.89, up 1 percent from 2002. Average prices for the 2003 crop by type were as follows: red wine grapes, \$600.29, down 2 percent from 2002; white wine grapes, \$418.22, down 3 percent from 2002; raisin grapes, \$94.90, up 26 percent; and table grapes, \$92.16, up 14 percent. These price levels have not been adjusted for inflation.



LEADING GRAPE VARIETIES AND DISTRICTS

In 2003, Chardonnay accounted for the largest percentage of crush volume with 17 percent. Cabernet Sauvignon accounted for the second leading percentage of crush with 12 percent of the total crush. With the exception of Thompson Seedless, 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 \$3,032.93 per ton, up 3 percent from 2002. District 3 (Sonoma and Marin counties) received the second highest return of \$1,943.49, down 6 percent from 2002. The 2003 Chardonnay price of \$655.02 was down 4 percent from 2002, while the 2003 Cabernet Sauvignon price of \$1,009.48 was down 2 percent from 2002. The 2003 average price for Merlot and Zinfandel grapes decreased to \$788.85 and \$426.64, down 8 percent and 10 percent from 2002, respectively.



CITRUS FRUIT PRODUCTION

Crop and State	2001-02	2002-03	Forecast 2003-04
	1,000 Cartons		
ORANGES: 1/			
California, All	103,000	124,000	116,000
Navel & Misc.	64,000	82,000	78,000
Valencia	39,000	42,000	38,000
Florida	460,000	406,000	492,000
Texas	3,480	3,140	3,060
Arizona	1,040	940	940
ALL U.S. ORANGES	567,520	534,080	612,000
GRAPEFRUIT: 2/			
California	11,800	11,200	10,400
Florida	93,400	77,400	80,000
Texas	11,800	11,300	10,600
Arizona	320	260	200
ALL U.S. GRAPEFRUIT	117,320	100,160	101,200
LEMONS: 3/			
California	36,600	48,000	46,000
Arizona	5,600	6,000	6,400
ALL U.S. LEMONS	42,200	54,000	52,400
TANGERINES: 4/			
California 5/	4,400	5,000	5,000
Florida	13,200	11,000	11,800
Arizona	1,240	860	1,200
ALL U.S. TANGERINES	18,840	16,860	18,000

The 2003 **PRELIMINARY CALIFORNIA GRAPE CRUSH REPORT** is now available to GRAPE GROWERS free-of-charge. All others may obtain a copy by calling the California Agricultural Statistics Service at (916) 498-5161 or by writing to P.O. Box 1258, Sacramento, CA 95812. Please enclose a check for \$10.00 -- made payable to "Cashier, Department of Food and Agriculture."



The 2003 **FINAL GRAPE CRUSH REPORT** will be available on March 10, 2004 to GRAPE GROWERS free-of-charge. All others may obtain a copy (book or diskette) by calling the California Agricultural Statistics Service at (916) 498-5161 or by writing to P.O. Box 1258, Sacramento, CA 95812. Please enclose a check for \$10.00 (book) or \$20.00 (diskette) -- made payable to "Cashier, Department of Food and Agriculture." When ordering a diskette (3.5), please specify file format (WordPerfect 8, Database, Lotus or Excel Spreadsheet) on the order.

Both the **PRELIMINARY AND FINAL GRAPE CRUSH REPORTS** will be available free-of-charge on the Internet at <http://www.nass.usda.gov/ca>.

- 1/ ORANGES: California and Arizona, 1 carton = 37.5 lbs.; Florida, 1 carton = 45 lbs.; Texas, 1 carton = 42.5 lbs.
- 2/ GRAPEFRUIT: California and Arizona, 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.