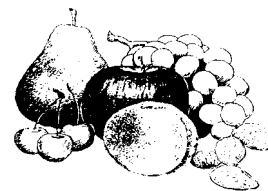


California Fruit & Nut Review



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CALIFORNIA AGRICULTURAL
STATISTICS SERVICE

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FEBRUARY CROP COMMENTS

Seasonal cultural activities such as pruning, grafting, cultivating, irrigating, and dormant spraying continued in orchards and vineyards. Sunny days during the middle of February encouraged more widespread blooming in early variety peach, nectarine, and plum orchards. Rain late in the month was a mixed blessing for stone fruit growers. Although the water was needed, the rain posed a potential threat to a good fruit set, as bloom and pollination were already in progress. Tree loss from high winds was reported in Sutter County. Pruning, cane tying, and some brush shredding were ongoing in raisin, wine,

and table grape vineyards. Due to muddy conditions, new planting and removal of orchards and vineyards was delayed. Some grafting of table grapes began in Tulare County. Stumps and brush from orchard and vineyard removal were piled for burning and recycling. Almond trees were blooming across the State, but were at varying stages depending on location and weather conditions. High winds and rain blew over some almond trees in the San Joaquin Valley. Dormant sprays and bloom sprays were applied as weather and soil conditions allowed. Pruning in walnut and pistachio orchards continued as weather permitted. The Navel orange harvest continued throughout the month, but was slowed by rain during the later part of February. Puff and crease continued to affect blood oranges, and Cara Cara oranges were picked and packed. Lemon harvest in the desert region was wrapping up, but continued in the Central Valley and South Coastal region. Mandarins and tangelos were picked as conditions allowed. The Oroblanco and Pummelo variety grapefruit harvests continued in the Central Valley, while the Rio Red variety grapefruit harvest continued in the Coachella Valley. Snail control in citrus groves was ongoing.

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		
	Acres		Pounds		1,000 Pounds			
NUT CROPS								
Almonds (Shelled) <u>1/</u>	530,000	530,000	2,060	1,920	1,090,000	1,020,000	-6	May 11, 2004
Pecans	2,600	2,600	1,460	1,380	3,800	3,600	-3	October 12, 2004
Pistachio (In-Shell)								
Marketable In-Shell	---	---	---	---	242,000	88,000		
Shelling Stock	---	---	---	---	61,000	28,000		
Total <u>2/</u>	83,000	88,000	3,650	1,320	303,000	116,000	-62	July 30, 2004
			Tons		1,000 Tons			
Walnuts (In-Shell) <u>3/</u>	200,000	205,000	1.41	1.59	282.0	325.0	15	September 2, 2004
FRUIT CROPS								
Apples	26,000	26,000	9.04	8.85	235.0	230.0	-2	August 12, 2004
Apricots	17,000	16,500	5.00	5.61	85.0	92.5	9	June 11, 2004
Cherries	26,000	27,000	2.13	2.30	55.5	62.0	12	June 11, 2004
Grapes, Raisin <u>4/</u>	246,000	255,000	11.40	8.24	2,804.0	2,100.0	-25	July 12, 2004
Grapes, Table	88,000	89,000	8.44	7.75	743.0	690.0	-7	July 12, 2004
Grapes, Wine	486,000	479,000	6.48	6.05	3,149.0	2,900.0	-8	July 12, 2004
Grapes, All <u>4/</u>	820,000	823,000	8.17	6.91	6,696.0	5,690.0	-15	July 12, 2004
Olives	36,000	36,000	2.86	3.28	103.0	118.0	15	August 12, 2004
Peaches, Clingstone	31,000	31,000	18.10	17.30	562.0	536.0	-5	May 12, 2004
Peaches, Freestone	39,000	39,000	10.20	10.20	398.0	399.0	N/C	May 12, 2004
Pears, Bartlett	13,000	12,500	17.90	16.10	232.0	201.0	-13	June 11, 2004
Pears, Other	4,300	4,300	6.98	6.98	30.0	30.0	N/C	August 12, 2004
Plums, Dried <u>5/</u>	74,000	72,000	2.32	2.44	172.0	176.0	2	June 4, 2004
BERRIES								
Strawberries	28,500	29,600	Cwt.		1,000 Cwt.			
			565	620	16,097	18,352	14	April 2, 2004
CITRUS CROPS <u>6/</u>								
	2002-03	2003-04	2002-03	2003-04	2002-03	2003-04		
			Cartons		1,000 Cartons			
Grapefruit	13,000	12,500	862	832	11,200	10,400	-7	April 8, 2004
Lemons	49,000	49,000	980	939	48,000	46,000	-4	April 8, 2004
Oranges, Navel	127,500	128,000	643	609	82,000	78,000	-5	April 8, 2004
Oranges, Valencia	64,000	52,000	656	577	42,000	30,000	-29	April 8, 2004
Tangerines <u>7/</u>	9,200	9,500	543	526	5,000	5,000	N/C	April 8, 2004

1/ Almond Subjective Forecast Report released May 11 at 12:00 PM. Almond Objective Measurement Report released June 30 at 12:00 PM.

2/ Pistachio Objective Measurement Report released July 30 at 12:00 PM.

3/ Walnut Objective Measurement Report released September 2 at 12:00 PM.

4/ The Raisin Industry Diversion Program (RID) had 27,000 acres in 2002, but zero acreage in 2003. RID is deducted from bearing acreage.

5/ Dried Plum Forecast Report released June 4 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	
	2002	2003	2002	2003	2002	2003	2002	2003	2002	2003	2002	2003
	Acres				Cwt.		1,000 Cwt.		Dollars		1,000 Dollars	
California	28,500	29,600	28,500	29,600	565	620	16,097	18,352	57.90	61.00	931,649	1,118,802
Florida	6,900	7,100	6,900	7,100	255	220	1,760	1,562	87.20	87.20	153,472	136,206
Michigan	1,300	1,300	1,200	1,200	47	53	56	63	93.40	100.00	5,228	6,320
New York	1,700	1,700	1,400	1,500	45	33	63	50	140.00	155.00	8,820	7,750
North Carolina	1,900	1,800	1,800	1,700	125	100	225	170	85.00	90.00	19,125	15,300
Ohio	1,300	1,300	1,100	1,100	35	48	39	53	124.00	120.00	4,836	6,360
Oregon	3,500	3,500	3,000	2,600	115	115	338	295	49.20	49.70	16,613	14,675
Pennsylvania	1,300	1,300	1,300	1,300	56	64	73	83	137.00	134.00	10,001	11,122
Washington	1,800	1,700	1,800	1,700	90	90	162	153	51.00	52.20	8,262	7,979
Wisconsin	1,000	1,000	900	900	48	50	43	45	116.00	117.00	4,988	5,265
U.S. Total	49,200	50,300	47,900	48,700	394	428	18,856	20,826	61.70	63.90	1,162,994	1,329,779

BERRIES: ACREAGE, YIELD, PRODUCTION, PRICE AND VALUE BY CROP, STATE AND UNITED STATES, 2001-03

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	2001	230	8,260	1,900	0.816	1,550
	2002	210	8,100	1,700	0.816	1,388
	2003	200	6,000	1,200	0.891	1,069
Oregon	2001	1,380	2,970	4,170	0.630	2,583
	2002	1,200	3,000	3,630	0.582	2,094
	2003	1,100	3,180	3,500	0.853	2,984
United States	2001	1,610	3,730	6,070	0.689	4,133
	2002	1,410	3,760	5,330	0.657	3,482
	2003	1,300	3,620	4,700	0.862	4,053
Black Raspberries						
Oregon	2001	1,200	3,180	3,950	0.452	1,724
	2002	1,100	2,650	3,020	0.411	1,199
	2003	1,100	2,360	2,700	1.360	3,540
Red Raspberries						
Oregon	2001	2,700	5,890	15,900	0.513	8,156
	2002	2,300	4,480	10,300	0.727	7,492
	2003	2,300	3,830	8,800	0.825	7,262
Washington	2001	9,500	7,900	76,050	0.503	37,784
	2002	9,500	7,800	74,100	0.499	36,985
	2003	9,200	7,300	67,700	0.544	36,554
United States	2001	12,200	7,450	91,950	0.505	45,940
	2002	11,800	7,150	84,400	0.527	44,477
	2003	11,500	6,610	76,500	0.577	43,816
All Raspberries						
California	2001	2,300	10,900	25,000	1.660	41,500
	2002	2,400	12,200	29,200	1.400	40,851
	2003	2,500	12,400	31,000	2.080	64,480

^{1/} Yields based on utilized production.

FINAL GRAPE CRUSH REPORT

The 2003 crush totaled 3,370,012 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 1,633,541 tons, down 10 percent from 2002. The 2003 white wine variety crush totaled 1,230,255 tons, down 4 percent from 2002. Tons crushed of raisin type varieties totaled 421,981, down 32 percent from 2002, while tons crushed of table type varieties totaled 84,235, up 39 percent from 2002. (See chart below.)

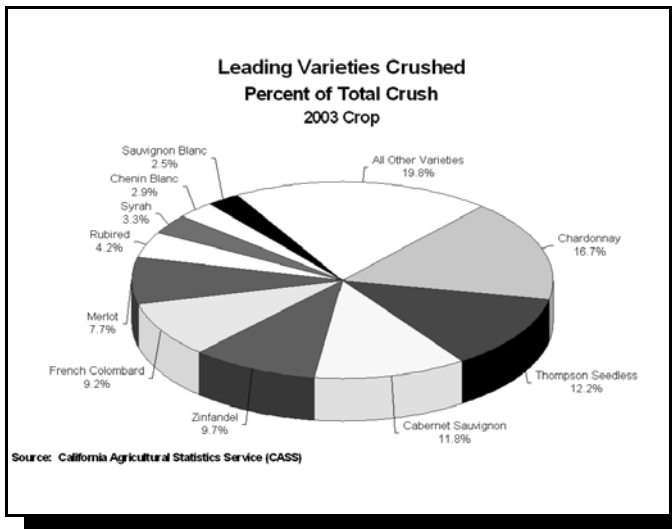
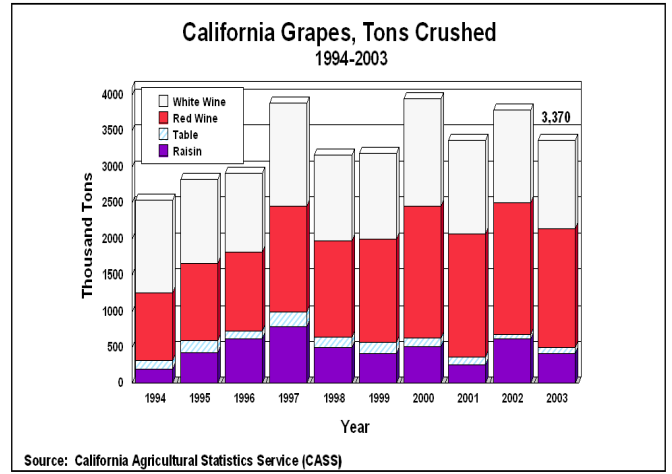
Beginning with the 1999 season, the Grape Crush Report includes the total number of tons crushed that will be marketed as grape concentrate. In determining grape tonnage crushed for concentrate production, each processor was required to report the estimated equivalent tons of grapes crushed that are expected to be marketed as grape concentrate. For the 2003 season, this total was 506,877 tons, approximately 15 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 \$471.46, up 2 percent from 2002. Average prices for the 2003 crop by type were as follows: red wine grapes, \$608.60, down 1 percent from 2002; white wine grapes, \$428.88, down 1 percent from 2002; raisin grapes, \$95.12, up 26 percent; and table grapes, \$91.35, up 13 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. Thompson Seedless accounted for the second leading percentage of crush with 12 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 \$3,032.51 per ton, up 3 percent from 2002. District 3 (Sonoma and Marin counties) received the second highest return of \$1,947.38, down 5 percent from 2002. The 2003 Chardonnay price of \$665.01 was down 3 percent from 2002, while the 2003 Cabernet Sauvignon price of \$1,013.60 was down 1 percent from 2002. The 2003 average price for Merlot and Zinfandel grapes decreased to \$791.95 and \$427.83, down 8 percent and 10 percent from 2002, respectively.



CALIFORNIA GRAPE CRUSH TONNAGE AND PRICE, 1988-2003

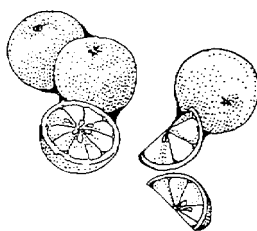
Crop Year	Raisin Type		Table Type		Red Wine Type		White Wine Type		All Types	
	Tons (1,000)	Dollars Per Ton	Tons (1,000)	Dollars Per Ton	Tons (1,000)	Dollars Per Ton	Tons (1,000)	Dollars Per Ton	Tons (1,000)	Dollars Per Ton
1988	415	116	312	131	760	409	1,356	238	2,843	253
1989	370	132	211	128	872	410	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	614	1,288	432	3,787	462
2003	422	95	84	91	1,634	609	1,230	429	3,370	471

Source: California Agricultural Statistics Service (CASS)

FLORIDA CITRUS COMMENTS

Florida's weather in the citrus areas during February was beneficial with cool nighttime temperatures and moderate to warm days. Several cold fronts passed through the State bringing overnight temperatures to the mid to upper 30's. Daytime highs reached to the low 80's on several days with some cloudy days near the end of the month. The cold fronts brought varying amounts of rainfall with the most precipitation the last week of the month. Coastal areas received more than 2.5 inches, while the interior generally had more than 2 inches. Citrus trees in all areas are in excellent condition following the good weather of the past several months. New growth was reported mid-month in some southern locations and statewide by the end of the month. Some early orange varieties in the southern groves are near full open bloom, while later blooming varieties, like tangerines, are showing buds just forming. Upper interior and central area groves are just entering the bloom cycle with swelling buds prevalent on early blooming varieties.

Early-mid season orange harvest is declining as the season nears completion. Navel orange harvest was nearly complete by the first of the month. Valencia oranges are beginning to be harvested, primarily for fresh shipments. Grapefruit harvest for fresh use increased during the month with harvest for processing increasing near the end of the month. Early variety tangerine harvest is complete, while Honey tangerine harvest is well under way. Tangelo harvest is complete, but Temple harvest for processing is active.



CITRUS FRUIT PRODUCTION

Crop & State	2001-02	2002-03	Forecast 2003-04
	1,000 Cartons		
ORANGES: 1/			
California, All	103,000	124,000	108,000
Navel & Misc.	64,000	82,000	78,000
Valencia	39,000	42,000	30,000
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	604,000
GRAPEFRUIT: 2/			
California, All	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 6/	13,200	11,000	11,800
Arizona 5/	1,240	860	1,200
ALL U.S. TANGERINES	18,840	16,860	18,000

- 1/ ORANGES: California and Arizona, 1 carton = 37.5 lbs.; Florida, 1 carton = 45 lbs.; Texas, 1 carton = 42.5 lbs.
- 2/ GRAPEFRUIT: Arizona and 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.
- 6/ Varieties for 2001-02 include Robinson, Fallglo, Sunburst, Dancy, and Honey, but 2002-03 include Fallglo, Sunburst, and Honey.