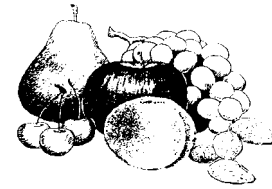


California Fruit & Nut Review



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AUGUST CROP COMMENTS

Fruit growers conducted cultural activities including weed control, fungicide applications, and irrigation of trees and vines. The stone fruit harvest remained active throughout the month. O'Henry, Arctic Snow and Snow Giant peaches, Howard Sun and Emerald Beaut plums, August Red and August Glo nectarines, and Flavor Grenade and Yummy Giant pluots were harvested. Granny Smith and Gala apples, Asian pears, Early Foothill pomegranates, pineapple quince, and figs were also picked, packed, and shipped. Prune harvest in the northern areas was progressing quickly with a very light crop reported. Persimmons were gaining size steadily, with irrigation underway as needed, but external coloring slowed because of warm temperatures. Raisin

grape harvesting began in the San Joaquin Valley during the first week in August and gained momentum as the month progressed. Approximately 20 percent of the crop was harvested by the end of August. Fruit in dried-on-the-vine vineyards was drying evenly, but no harvesting was reported. Wine grape harvesting continued throughout the month. Picking and packing of table grapes continued in the San Joaquin Valley. Thompson Seedless and Flame Seedless were among the varieties harvested. Olives continued to size normally, while olive growers applied treatment for fruit flies. The kiwifruit crop was reported to be generally normal, but with small sizes. Strawberries were harvested on the central coast. Almond harvest was active throughout the month. Trees were shaken, and nuts were raked into windrows, picked up, and hauled to processors. Steady crop maturity continued in pistachio, walnut, and pecan orchards. Irrigation was underway in several areas. Walnut orchards were treated for husk fly and codling moth. Valencia oranges continued to be picked, but harvesting activity was slowing. Fruit quality began showing a normal season decline, including rind puff and greening. The new Navel orange crop progressed normally. Lemons and grapefruit continued to be harvested. Citrus groves were irrigated due to the intense summer heat and dry conditions.

FRUIT AND NUT STATISTICS AT A GLANCE

Crop	Bearing Acreage		Yield Per Acre		Estimated Production		Production Percent Change	Next Crop Update
	2003	2004	2003	2004	2003	2004		
NUT CROPS	Acres		Pounds		1,000 Pounds			
Almonds (Shelled)	550,000	550,000	1,890	1,960	1,040,000	1,080,000	4	January 2005
Pecans	2,600	---	1,380	---	3,600	---		October 12, 2004
Pistachio (In-Shell)								
Marketable In-Shell	---	---	---	---	88,000	---		
Shelling Stock	---	---	---	---	28,000	---		
Total	88,000	---	1,350	---	119,000	---		January 2005
Walnuts (In-Shell)	213,000	217,000	1.53	1.50	326.0	325.0	N/C	January 2005
			Tons		1,000 Tons			
FRUIT CROPS								
Apples	26,000	26,000	8.65	8.46	225.0	220.0	-2	January 2005
Apricots	16,500	16,000	5.61	5.63	92.5	90.0	-3	January 2005
Cherries	25,000	26,000	2.75	2.50	68.8	65.0	-6	January 2005
Grapes, Raisin ^{1/}	255,000	244,000	8.43	8.40	2,149.0	2,050.0	-5	October 12, 2004
Grapes, Table	85,000	83,000	8.61	9.04	732.0	750.0	2	October 12, 2004
Grapes, Wine	479,000	473,000	6.07	6.13	2,909.0	2,900.0	N/C	October 12, 2004
Grapes, All	819,000	800,000	7.07	7.13	5,790.0	5,700.0	-2	October 12, 2004
Olives	36,000	32,000	3.28	2.66	118.0	85.0	-28	January 2005
Peaches, Clingstone	31,000	32,500	17.30	17.70	536.0	575.0	7	January 2005
Peaches, Freestone	37,000	37,000	11.20	10.50	413.0	390.0	-6	January 2005
Pears, Bartlett	13,000	13,000	16.70	17.70	217.0	230.0	6	January 2005
Pears, Other	4,300	4,000	12.80	12.00	55.0	48.0	-13	January 2005
Plums, Dried	72,000	70,000	2.51	1.00	181.0	70.0	-61	January 2005
BERRIES			Cwt.		1,000 Cwt.			
Strawberries	29,600	33,200	620	590	18,352	19,588	7	January 2005
CITRUS CROP ^{2/}	2003-04	2004-05	2003-04	2004-05	2003-04	2004-05		
			Cartons		1,000 Cartons			
Grapefruit	12,500	---	864	---	10,800	---		September 23, 2004
Lemons	49,000	---	735	---	36,000	---		September 23, 2004
Oranges, Navel	130,000	130,500	585	705	76,000	92,000	21	September 23, 2004
Oranges, Valencia	52,000	---	577	---	30,000	---		September 23, 2004
Tangerines ^{3/}	9,500	---	505	---	4,800	---		September 23, 2004

^{1/} The Raisin Industry Diversion Program (RID) had zero acres enrolled for 2003 and 2004.

^{2/} Grapefruit - 33.5 lbs. per carton, Lemons - 38.0 lbs. per carton, Oranges - 37.5 lbs. per carton, Tangerines - 37.5 lbs. per carton.

^{3/} Includes tangelos, tangerines, and tangors.

FLORIDA CITRUS

The month of August was marked by hot temperatures and high humidity, which were increased by the passage of Hurricane Charley on August 13 through the center of a major citrus area. Although rainfall was adequate during the month, hot temperatures caused surface soil drying in many areas. Rainfall was heaviest early in the month in all citrus growing areas and lighter following the hurricane. Charley's rainfall accumulations were variable, but not heavy as the storm moved very quickly through Florida. Hurricane Charley entered the State in Charlotte County and moved northeast through De Soto, Hardee, and Polk, three of the major orange producing counties in the State. As the storm moved ashore, it was compact with high winds around the eye in a very tight pattern. Areas up to 20 miles out from the eye received varying amounts of damage and fruit loss. Tornadoes spawned by the storm were numerous and uprooted trees in some groves. The storm moved through Orange and Seminole counties and exited the State near Daytona Beach. Following the storm, varying amounts of fruit were observed on the ground with tree limb breakage prevalent. Some trees were blown over. Groves hard hit from Hurricane Charley continue to drop fruit as growers assess damage and move downed trees to provide access to groves. The Florida NASS office was in the process of completing the annual Limb Count Survey when Hurricane Charley hit. A portion of the samples located in the affected counties will be revisited before the October *Crop Production Report* in order to factor the tree and fruit loss into the first Florida citrus production forecast for the 2004-05 season.

On September 5, powerful Hurricane Frances hit Florida's East Coast. It made landfall near Stuart and moved slowly northwest through St. Lucie, Okeechobee, Osceola, Polk, and Lake counties, and exited the State north of Tampa. This was a very large storm with high winds and large amounts of rain. The East Coast is the major grapefruit growing area and sustained winds did considerable damage to fruit and trees. St. Lucie, Martin, Indian River, and Palm Beach counties, all citrus producing counties, were hit hardest. These counties account for almost 200,000 acres of Florida citrus with nearly 80,000 acres of grapefruit (the equivalent of 73 percent of Florida's grapefruit bearing acreage) and approximately 112,000 acres of orange production (the equivalent of 17 percent of Florida's orange bearing acreage). St. Lucie and Indian River grow the bulk of the total. Reports are very preliminary, but indicate more fruit loss on grapefruit than oranges with limited tree mortality. Heavy rainfall left high water in many groves and ditches, making the task of moving this water away from the tree roots a high priority. Nearly all of the "Annual Limb Count Survey" samples had been worked on Florida's East Coast area. Currently, plans are in place to revisit a portion of these samples prior to the October *Crop Production Report*.

CALIFORNIA NAVEL ORANGE FORECAST

The initial 2004-05 Navel orange forecast is a record high 92.0 million (37.5-pound) cartons, 21 percent above last season's crop of 76.0 million cartons. Of the total forecast, 90.0 million cartons are estimated to be in the Central Valley. Survey data indicated an

average fruit set of 392 oranges per tree, with a September 1 diameter of 2.495 inches, the highest September 1 diameter on record.

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/ (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	60,000,000	122,000	122	264	2.483	3.172
2002-03	79,500,000	122,500	122	466	2.200	3.000
2003-04	74,000,000	123,000	124	358	2.410	3.210
2004-05	90,000,000	123,500	125	392	2.495	3.295

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 2004-05 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 2004-05.

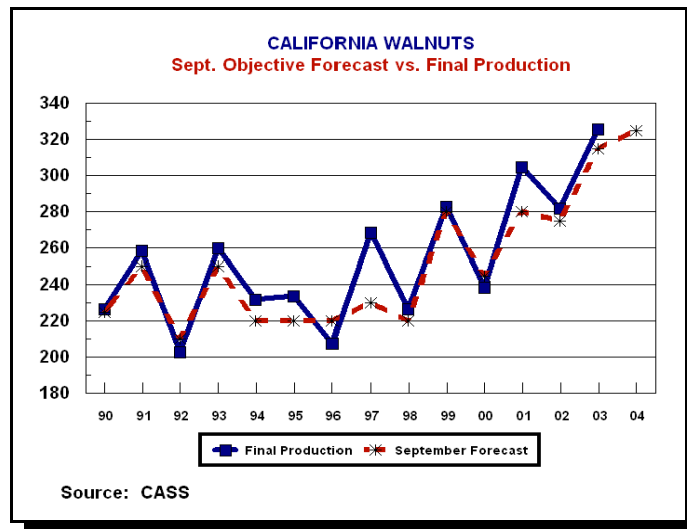
4/ Size data for 1984-85 through 1993-94 are from the Navel Orange Administrative Committee, while the data since 1993-94 are from the orange industry.

WALNUT PRODUCTION FORECAST

The 2004 California walnut production is forecast at 325,000 tons, down from 2003's record production of 326,000 tons. This forecast is based on the 2004 Walnut Objective Measurement (O.M.) Survey, which was conducted July 26 through August 24, 2004.

The 2004 Walnut O.M. Survey utilized a total of 694 blocks with two sample trees per block. Survey data indicated an average nut set of 1,526, down 5 percent from 2003's average of 1,599. The Hartley nut set was up 18 percent; Chandler, was down 13 percent; Serr, was down 30 percent; Franquette, was up 76 percent from 2003. Percent of sound kernels in-shell was 98.2 percent Statewide. In-shell weight per nut was 22.5 grams, while the average in-shell suture measurement was 32.6 millimeters. The average length in-shell was 39.0 millimeters.

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



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

Year	Coast ^{1/}	Sacramento Valley ^{2/}	San Joaquin Valley ^{3/}	State ^{4/}
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
2004	924	1,943	1,168	1,526

^{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	Kernel Grade - Percent Sound	In-Shell			
				Weight	Width	Length	Cross-Width
				gm	mm		
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	198,000	227,000	94.4	21.4	31.9	39.5	31.8
1999	197,000	283,000	97.9	23.0	32.2	39.4	32.7
2000	200,000	239,000	96.9	21.2	32.2	38.2	32.8
2001	204,000	305,000	97.8	21.5	31.7	38.3	31.6
2002	210,000	282,000	96.3	22.0	32.4	38.5	32.7
2003	213,000	326,000	97.0	22.4	32.5	39.1	32.4
2004 ^{a/}	217,000	325,000	98.2	22.5	32.6	39.0	32.5

^{a/} Bearing years include plantings of the following: Chandler, Chico, Howard, Tulare (2000 & 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 (1999 and Earlier); Franquette, Franquette Scharsch, Mayette, Placentia, Poe, Willsons/Willsons Wonder, Woodland (1997 & Earlier); all other varieties not specified (1998 & Earlier).