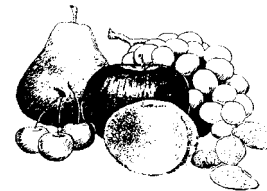


California Fruit & Nut Review



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FLORIDA CITRUS

Florida's weather patterns were generally typical over the citrus producing areas for January with cool nights and moderate day temperatures. The exception was several mornings as cold fronts passed through the State. Each one of these fronts brought varying amounts of rainfall and morning low temperatures in the mid to low 30's in some locations and only the mid 40's in others. Light frost was reported on one morning in northern and central locations. Daytime high temperatures during January were generally in the 70's with some days reaching into the low 80's. Days following the passage of the cold fronts were the exception with daytime temperatures remaining in the 50's. Rainfall patterns were also typical with most precipitation occurring prior to the passage of a cold front. Total rainfall in January was generally below normal in most areas. Harvest of early mid-season oranges increased with weekly harvest reaching more than six million boxes during only one week. Navel orange harvest continued during the month with the fruit holding well. Grapefruit harvest for fresh shipments continued steady during the month with harvest for processing increasing near the end of the month. Sunburst tangerine harvest is complete and harvest of Honey tangerines is increasing. Tangelo harvest is nearing completion and Temple harvest for fresh and processing usage is increasing.

JANUARY CROP COMMENTS

Variable weather during January caused delays in seasonal cultural activities in many locations. Grape growers pruned vines, tied canes, repaired trellis wire, and replaced end posts in wine, raisin, and table grape vineyards as weather and field conditions permitted. Fertilizers and soil amendments were applied in many vineyards. Tree and vine removal of unwanted varieties continued. The open ground was prepared for new plantings. Pruning and shredding activities neared completion in fruit and nut orchards, but weed spraying, field fumigation, and dormant spraying continued as field conditions allowed. At month's end, growers began placing bees in almond orchards to aid in pollination. Pruning of olive orchards continued and brush was shredded. In the San Joaquin Valley, plum, peach, nectarine, and almond orchards began pushing buds. One plum orchard in the Sanger District was in full-bloom. Field preparations for the spring strawberry crop were underway, with some growers laying out plastic. Cold temperatures during the month prompted berry growers to take measures to protect sensitive plants. Harvest activity of avocados increased. Citrus growers conducted pest management fieldwork in citrus groves including applications of pre-emergent herbicides and fungicides. Harvesting of Navel oranges, lemons, grapefruit, and pummelos continued, but was often delayed due to rain and fog in many locations. Citrus fruit maturity and external color were reported as excellent with good yields also being reported. However, ice mark and rind puff began appearing on some Navels, resulting in lower pack-outs.

CALIFORNIA CITRUS CROPS FORECAST MONTHS, 2004-05 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			

1/ Navel Objective Measurement was released September 10, 2004. 2/ Valencia Objective Measurement tentative release March 10, 2005.

CALIFORNIA NON CITRUS CROPS FORECAST MONTHS, 2005 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							X
Walnuts					<u>5/</u>		X

1/ Olive Probability Survey released August 12, 2005. 2/ Plums, Dried (Prunes) Probability Survey released June 3, 2005. 3/ Almond Subjective Forecast Report released May 11, 2005. 4/ Almond Objective Measurement tentative release June 30, 2005. 5/ Walnut Objective Measurement tentative release September 1, 2005.

CALIFORNIA NUTS: ACREAGE, PRODUCTION, PRICE AND VALUE, 2003-04

Crop	Year	Bearing Acreage	Yield	Total Production	Value of Utilized Production	
			Per Bearing Acre		Grower Return	Total Value
			Pounds		Dollars Per Pound	\$1,000
Almonds, Shelled <u>1/</u>	2003	550,000	1,890	1,040.0	1.57	1,600,144
	2004	550,000	1,860	1,020.0	2.04	2,051,628
Pistachios, In-Shell	2003	88,000	1,350	119.0	1.22	145,180
	2004	93,000	3,740	348.0	1.26	438,480
Pecans, In-Shell	2003	2,600	1,420	3.7	1.42	5,254
	2004	2,600	1,390	3.6	1.92	6,912
			Tons	Thousand Tons	Dollars/Ton	\$1,000
Walnuts, In-Shell <u>2/</u>	2003	213,000	1.53	326,000	1,150	374,900
	2004	217,000	1.50	325,000	---	---

1/ Price and value are based on the edible portion of the crop only. Production includes inedible quantities of no value as follows: 2003 - 20.8 million pounds and 2004 - 14.3 million pounds.

2/ Grower return and total value for the 2004 crop year will be released July 6, 2005.

CALIFORNIA NON-CITRUS FRUITS: ACREAGE, PRODUCTION, PRICE AND VALUE, 2003-04

Crop	Year	Bearing Acreage	Yield	Total Production	Value of Utilized Production	
			Per Bearing Acre		Price Per Ton	Total Value
			Tons		Dollars	\$1,000
Apples	2003	28,000	8.04	225.0	356	78,190
	2004	26,000	7.88	205.0	306	61,300
Apricots	2003	16,500	5.61	92.5	316	29,225
	2004	16,000	5.88	94.0	334	28,575
Avocados	2002-03	59,500	2.82	168.0	2,170	364,560
	2003-04	61,000	3.56	217.0	1,760	381,920
Cherries, Sweet	2003	25,000	2.62	65.6	1,670	106,883
	2004	26,000	2.81	73.0	1,750	123,156
Dates	2003	5,300	3.09	16.4	1,640	26,896
	2004	4,500	4.60	20.7	1,520	31,464
Figs	2003	13,000	3.73	48.5	317	15,373
	2004	12,500	4.06	50.8	383	19,463
Grapes, All	2003	819,000	7.05	5,770.0	406	2,313,390
	2004	800,000	6.70	5,360.0	490	2,624,954
Raisin Type	2003	255,000	8.35	2,129.0	172	362,907
	2004	244,000	7.91	1,930.0	320	618,522
Table Type	2003	85,000	8.61	732.0	601	407,607
	2004	83,000	8.80	730.0	716	523,032
Wine Type	2003	479,000	6.07	2,909.0	530	1,542,876
	2004	473,000	5.71	2,700.0	549	1,483,400
Kiwifruit <u>1/</u>	2003	4,500	5.64	25.4	853	20,472
	2004	4,500	5.76	25.9	---	---
Nectarines	2003	36,500	7.48	273.0	436	119,028
	2004	36,500	7.45	272.0	342	86,278
Olives	2003	36,000	3.28	118.0	409	48,289
	2004	32,000	3.25	104.0	583	60,643
Peaches, All <u>2/</u>	2003	68,000	14.00	949.0	269	247,230
	2004	69,000	13.80	949.0	270	250,913
Clingstone <u>3/</u>	2003	31,000	17.30	536.0	215	108,484
	2004	32,000	16.80	539.0	263	141,494
Freestone	2003	37,000	11.20	413.0	336	138,746
	2004	37,000	11.10	410.0	281	109,419
Pears, All	2003	17,300	15.70	272.0	233	63,376
	2004	17,000	15.80	269.0	298	80,149
Bartlett	2003	13,000	16.70	217.0	216	46,850
	2004	13,000	17.00	221.0	253	56,005
Other Than Bartlett	2003	4,300	12.80	55.0	300	16,526
	2004	4,000	12.00	48.0	503	24,144
Plums	2003	36,000	5.81	209.0	418	87,362
	2004	36,000	4.33	156.0	516	74,347
Plums, Dried (Prunes)	2003	72,000	2.51	181.0	772	129,696
	2004	70,000	0.70	49.0	1,500	72,000
Berries,			Cwt.	1,000 Cwt.	Price Per Cwt.	
Boysenberries	2003	200	60.00	12.0	89.10	1,069
	2004	200	100.00	20.0	120.10	2,400
Raspberries	2003	3,000	205.00	615.0	208.00	127,920
	2004	3,200	208.00	665.0	209.00	138,985
Strawberries	2003	29,600	645.00	19,092.0	61.40	1,172,537
	2004	33,200	590.00	19,588.0	62.20	1,218,860

1/ Price per ton and total value for the 2004 crop year will be released July 6, 2005.

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

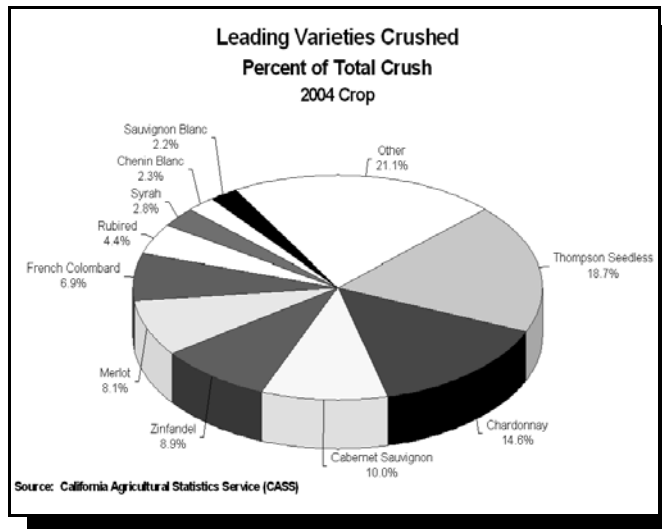
3/ The price published is the grower return and used to calculate value using utilized production.

PRELIMINARY GRAPE CRUSH REPORT

The 2004 crush totaled 3,616,951 tons, up 7 percent from the 2003 crush of 3,370,121 tons. Red wine varieties accounted for the largest share of all grapes crushed, at 1,637,024 tons, virtually unchanged from 2003. The 2004 white wine variety crush totaled 1,139,588 tons, down 7 percent from 2003. Tons crushed of raisin type varieties totaled 726,946, up 72 percent from 2003, while tons crushed of table type varieties totaled 113,393, up 35 percent from 2003. (See chart below.)

Beginning with the 1999 season, the Grape Crush Report includes the total number of tons crushed for concentrate production. In determining grape tonnage crushed for concentrate production, each processor was required to report the estimated equivalent tons of grapes crushed for grape concentrate. For the 2004 season, this total was 658,048 tons, approximately 18 percent of the 2004 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.

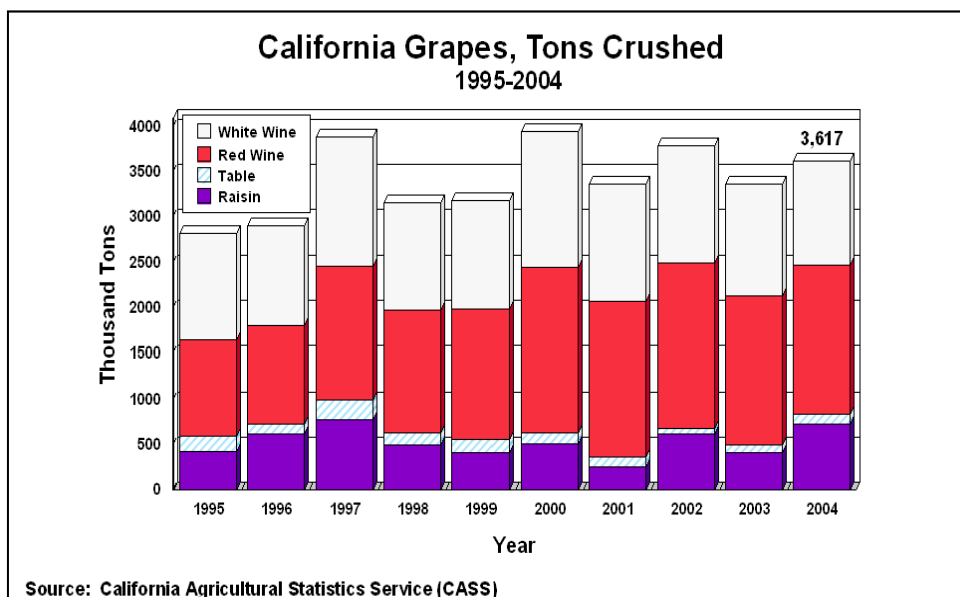
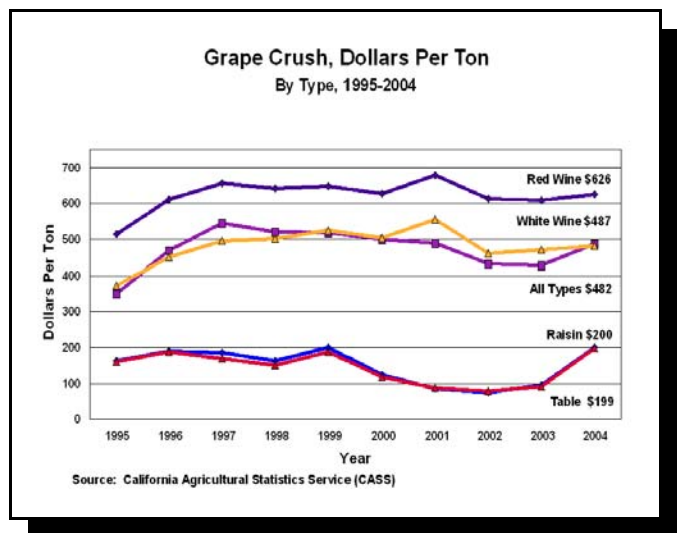
California grape growers received prices in 2004 for raisin, table, and white and red wine grapes that were, on average, above the 2003 prices. The 2004 average price of all varieties was \$481.91, up 2 percent from 2003. Average prices for the 2004 crop by type were as follows: red wine grapes, \$626.18, up 3 percent from 2003; white wine grapes, \$486.94, up 13 percent from 2003; raisin grapes, \$199.86, up 110 percent; and table grapes, \$198.52, up 117 percent. These price levels have not been adjusted for inflation.



LEADING GRAPE VARIETIES AND DISTRICTS

In 2004, Thompson Seedless accounted for the largest percentage of crush volume with 19 percent. Chardonnay accounted for the second leading percentage of crush with 15 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 \$2,942.53 per ton, down 3 percent from 2003. District 3 (Sonoma and Marin counties) received the second highest return of \$1,868.33, down 4 percent from 2003. The 2004 Chardonnay price of \$693.49 was up 4 percent from 2003, while the Cabernet Sauvignon price of \$982.38 was down 3 percent from 2003. The 2004 average price for Merlot was \$795.58, virtually unchanged from 2003, while the Zinfandel average price of \$471.97 was up 10 percent from 2003.



CITRUS FRUIT PRODUCTION

Crop and State	2002-03	2003-04	Forecast 2004-05
	1,000 Cartons		
ORANGES: 1/			
California, All	124,000	104,000	121,000
Navel & Misc.	84,000	76,000	88,000
Valencia	40,000	28,000	33,000
Florida	406,000	484,000	324,000
Texas	3,140	3,300	3,500
Arizona	940	940	860
ALL U.S. ORANGES	534,080	592,240	449,360
GRAPEFRUIT: 2/			
California	11,200	10,800	10,600
Florida	77,400	81,800	26,000
Texas	11,300	11,400	12,400
Arizona	260	280	360
ALL U.S. GRAPEFRUIT	100,160	104,280	49,360
LEMONS: 3/			
California	48,000	36,000	39,000
Arizona	6,000	6,000	4,800
ALL U.S. LEMONS	54,000	42,000	43,800
TANGERINES: 4/			
California 5/	5,600	5,400	5,800
Florida	11,000	13,000	9,000
Arizona	860	1,380	900
ALL U.S. TANGERINES	17,460	19,780	15,700

The 2004 **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 2004 **FINAL GRAPE CRUSH REPORT** will be available on March 10, 2005 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, 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.