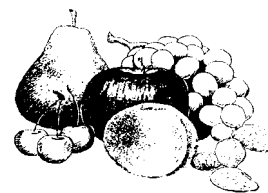


California Fruit & Nut Review



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CALIFORNIA AGRICULTURAL
STATISTICS SERVICE

HIGHLIGHTS IN THIS ISSUE:

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FEBRUARY CROP COMMENTS

Thanks to warm weather the first half of the month, almond, apricot, peach, plum, cherry, and nectarine orchards began blooming across the State, and early peach trees started leafing out. Blooming trees prompted growers to begin applying blossom sprays to fruit and nut orchards, as well as continue pruning, shredding, and weed removal activities. Some blossom thinning was also underway in a few plum orchards. Rain showers late in the month delayed fieldwork for some growers, as they continued to apply pesticides and prepare open land for new plantings. Bees were placed in almond orchards to aid in pollination, but the rainy weather resulted in unfavorable conditions

for the bees to pollinate blossoms. Cultural activities, including pruning, tying canes, repairing trellis wire, and replacing end posts, were finishing up in many grape vineyards by the end of February. Buds were beginning to swell by month's end in vineyards in the San Joaquin Valley, and some bud break was noted in the Sanger District. Strawberry plants in the San Joaquin Valley continued to flourish, and blueberry bushes were blooming. Avocado harvesting continued, but the rains caused delays and cancellations in harvesting. Growers were actively applying herbicides and fungicides to citrus orchards. Rain the last half of the month, however, caused delays and cancellations in fieldwork and harvesting. Harvesting of Navel oranges continued, but pack-outs of Navels remained low during February due to rind decay, peel miner, and end splits. Lemon harvesting in the Desert Region came to a close, but continued in the Central Valley and South Coastal Area. Satsumas and Clementines were harvested in the San Joaquin Valley. Fairchild and Minneola tangerines and Rio Red grapefruit were harvested from the Desert Region.

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		
	Acres		Pounds		1,000 Pounds			
NUT CROPS								
Almonds (Shelled) ^{1/}	550,000	550,000	1,890	1,860	1,040,000	1,020,000	-2	May 11, 2005
Pecans	2,600	2,600	1,420	1,340	3,700	3,600	-3	October 12, 2005
Pistachio (In-Shell)								
Marketable In-Shell	---	---	---	---	90,000	255,000		
Shelling Stock	---	---	---	---	29,000	93,000		
Total	88,000	93,000	1,350	3,740	119,000	348,000	192	July 6, 2005
			Tons		1,000 Tons			
Walnuts (In-Shell) ^{2/}	213,000	217,000	1.53	1.50	326.0	325.0	N/C	September 1, 2005
FRUIT CROPS								
Apples	28,000	26,000	8.04	7.88	225.0	205.0	-9	July 6, 2005
Apricots	16,500	16,000	5.61	5.88	92.5	94.0	2	June 10, 2005
Cherries	25,000	26,000	2.62	2.81	65.6	73.0	11	June 10, 2005
Grapes, Raisin ^{3/}	255,000	244,000	8.35	7.91	2,129.0	1,930.0	-9	July 6, 2005
Grapes, Table	85,000	83,000	8.61	8.80	732.0	730.0	N/C	July 6, 2005
Grapes, Wine	479,000	473,000	6.07	5.71	2,909.0	2,700.0	-7	July 6, 2005
Grapes, All ^{3/}	819,000	800,000	7.05	6.70	5,770.0	5,360.0	-7	July 6, 2005
Olives	36,000	32,000	3.28	3.25	118.0	104.0	-12	July 6, 2005
Peaches, Clingstone	31,000	32,000	17.30	16.80	536.0	539.0	1	May 12, 2005
Peaches, Freestone	37,000	37,000	11.20	11.10	413.0	410.0	-1	May 12, 2005
Pears, Bartlett	13,000	13,000	16.70	17.00	217.0	221.0	2	June 10, 2005
Pears, Other	4,300	4,000	12.80	12.00	55.0	48.0	-13	July 6, 2005
Plums, Dried ^{4/}	72,000	70,000	2.51	0.70	181.0	49.0	-73	June 3, 2005
BERRIES								
			Cwt.		1,000 Cwt.			
Strawberries	29,600	33,200	645	590	19,092	19,588	3	April 1, 2005
CITRUS CROPS ^{5/}								
	2003-04	2004-05	2003-04	2004-05	2003-04	2004-05		
			Cartons		1,000 Cartons			
Grapefruit	12,500	12,500	864	848	10,800	10,600	-2	April 8, 2005
Lemons	45,000	44,000	800	886	36,000	39,000	8	April 8, 2005
Oranges, Navel	130,000	130,500	585	674	76,000	88,000	16	April 8, 2005
Oranges, Valencia	52,000	45,500	538	879	28,000	40,000	43	April 8, 2005
Tangerines ^{6/}	10,500	11,300	514	513	5,400	5,800	7	April 8, 2005

^{1/} Almond Subjective Forecast Report released May 11 at 12:00 p.m. PDT. Almond Objective Measurement Report released June 30 at 12:00 p.m. PDT.

^{2/} Walnut Objective Measurement Report released September 1 at 12:00 p.m. PDT.

^{3/} Raisin Grape Objective Measurement Report released August 12 at 6:30 a.m. PDT.

^{4/} Dried Plum Forecast Report (Prunes) released June 3 at 12:00 p.m. PDT.

^{5/} Grapefruit -- 33.5 lbs. per carton; Lemons -- 38.0 lbs. per carton; Oranges -- 37.5 lbs. per carton; Tangerines -- 37.5 lbs. per carton.

^{6/} 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	
	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
	Acres		Cwt.		1,000 Cwt.		Dollars		1,000 Dollars			
California	29,600	33,200	29,600	33,200	645	590	19,092	19,588	61.40	62.20	1,172,537	1,218,860
Florida	7,100	7,100	7,100	7,100	220	230	1,562	1,633	82.70	109.00	129,177	177,997
Michigan	1,200	1,100	1,100	900	57	46	63	41	100.00	97.70	6,320	4,005
New York	1,700	1,700	1,500	1,500	33	43	50	65	155.00	160.00	7,750	10,400
North Carolina	1,800	1,700	1,700	1,600	100	110	170	176	90.00	90.00	15,300	15,840
Ohio	1,000	1,000	800	800	48	48	38	38	120.00	134.00	4,560	5,092
Oregon	3,500	3,300	2,600	2,400	115	135	295	324	49.70	48.90	14,675	15,839
Pennsylvania	1,300	1,300	1,300	1,300	64	61	83	79	134.00	137.00	11,122	10,823
Washington	1,800	1,900	1,800	1,900	90	80	162	152	52.10	47.80	8,436	7,270
Wisconsin	1,000	1,000	900	900	50	46	45	41	117.00	125.00	5,265	5,125
U.S. Total	50,000	53,300	48,400	51,600	445	429	21,560	22,137	63.80	66.50	1,375,142	1,471,251

BERRIES: ACREAGE, YIELD, PRODUCTION, PRICE AND VALUE BY CROP, STATE AND UNITED STATES, 2002-04

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	2002	210	8,100	1,700	0.816	1,388
	2003	200	6,000	1,200	0.891	1,069
	2004	200	10,000	2,000	1.200	2,400
Oregon	2002	900	3,670	3,330	0.585	1,932
	2003	800	3,880	3,100	0.857	2,656
	2004	750	4,270	3,200	1.120	3,568
United States	2002	1,110	4,500	5,030	0.664	3,320
	2003	1,000	4,300	4,300	0.866	3,725
	2004	950	5,470	5,200	1.150	5,968
Black Raspberries						
Oregon	2002	1,200	2,420	2,940	0.411	1,191
	2003	1,100	2,090	2,400	1.360	3,132
	2004	1,000	2,200	2,200	2.250	4,952
Red Raspberries						
Oregon	2002	2,200	3,450	7,600	0.731	5,555
	2003	2,000	2,600	5,200	0.812	4,220
	2004	1,900	3,530	6,700	0.860	5,763
Washington	2002	9,500	7,800	74,100	0.499	36,985
	2003	9,200	7,300	67,700	0.544	36,554
	2004	9,000	6,700	60,300	0.773	46,635
United States	2002	11,700	6,980	81,700	0.521	42,540
	2003	11,200	6,460	72,900	0.563	40,774
	2004	10,900	6,150	67,000	0.782	52,398
All Raspberries						
California	2002	2,400	12,200	29,200	1.400	40,851
	2003	3,000	20,500	61,500	2.080	127,920
	2004	3,200	20,800	66,500	2.090	138,985

^{1/} Yields based on utilized production.

FINAL GRAPE CRUSH REPORT

The 2004 crush totaled 3,615,231 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 1,638,658 tons, virtually unchanged from 2003. The 2004 white wine variety crush totaled 1,136,236 tons, down 8 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 113,391, up 35 percent from 2003.

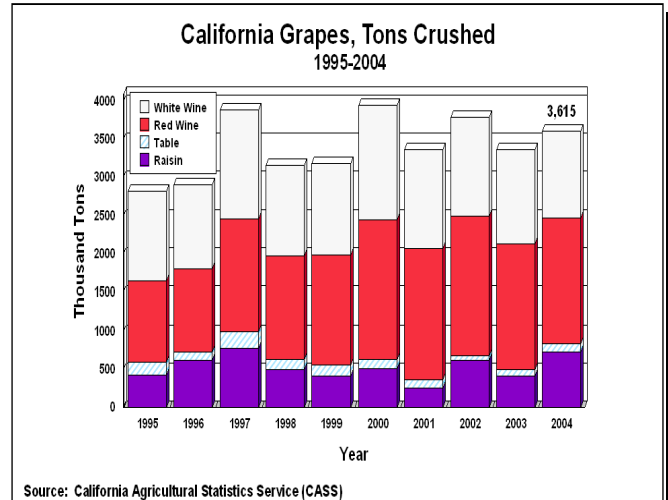
Beginning with the 1999 season, the Grape Crush Report includes the total number of tons crushed for concentrate production. In determining grape tonnage crushed for concentrate production, each processor was required to report the estimated equivalent tons of grapes crushed for grape concentrate. For 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 grapes that were, on average, above the 2003 prices. The 2004 average price of all varieties was \$482.26, up 2 percent from 2003. Average prices for the 2004 crop by type were as follows: red wine grapes, \$626.69, up 3 percent from 2003; white wine grapes, \$487.47, up 14 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.

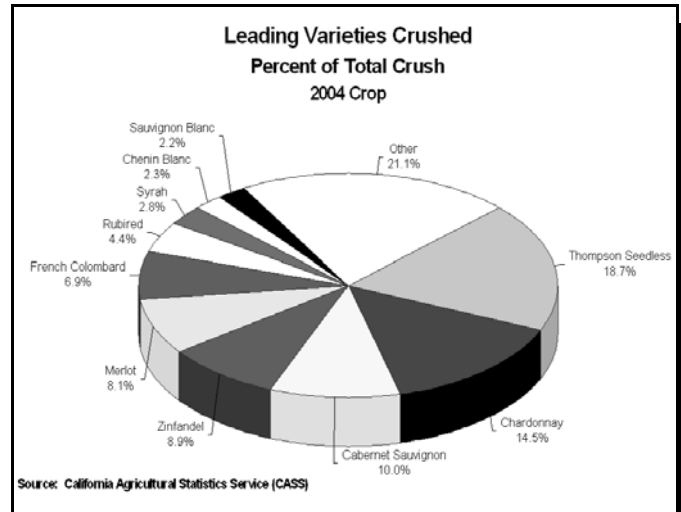
LEADING GRAPE VARIETIES AND DISTRICTS

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 \$2,935.77 per ton, down 4 percent from 2003. District 3 (Sonoma and Marin counties) received the second highest return of \$1,869.14, down 4 percent from 2003. The 2004 Chardonnay price of \$693.77 was up 4 percent from 2003, while the 2004 Cabernet Sauvignon price of \$977.71 was down 3 percent from 2003. The 2004 average price for Merlot was \$799.34, virtually unchanged from 2003, while the Zinfandel average price of \$473.47 was up 11 percent from 2003.



Source: California Agricultural Statistics Service (CASS)



Source: California Agricultural Statistics Service (CASS)

CALIFORNIA GRAPE CRUSH TONNAGE AND PRICE, 1988-2004

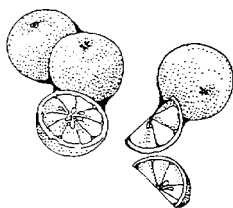
Crop Year	Raisin Type		Table Type		Red Wine Type		White Wine Type		All Types	
	Tons (1,000)	Dollars Per Ton	Tons (1,000)	Dollars Per Ton	Tons (1,000)	Dollars Per Ton	Tons (1,000)	Dollars Per Ton	Tons (1,000)	Dollars Per Ton
1988	415	116	312	131	760	409	1,356	238	2,843	253
1989	370	132	211	128	872	410	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
2004	727	200	113	199	1,639	627	1,136	487	3,615	482

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 with temperatures in the upper 30's to low 40's on several mornings. Daytime highs reached to the low 80's on several days. There was no frost reported during the month. Very little rainfall occurred during the first three weeks of February. However, a slow-moving cold front during the last weekend of the month dropped much needed rain over the entire citrus producing area. Some coastal areas received more than five inches of precipitation, while interior areas generally received more than two inches. Citrus trees in all areas are in good to excellent condition in spite of the relatively dry weather of the past several months. New growth was reported about mid-month in some southern locations and Statewide by the end of the month. Some early orange varieties in the southern groves are showing small amounts of open bloom. Later blooming varieties, like tangerines, are starting to show buds forming. Upper interior and central area groves are entering the bloom cycle with swelling buds just beginning to show.

Early mid-season weekly 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 shipments increased during the month with harvest for processing increasing near the end of the month. Early variety tangerine harvest is almost complete, but Honey tangerine harvest is well underway. Tangelo harvest is nearly complete, while Temple harvest for processing usage is heavy.



CITRUS FRUIT PRODUCTION


Crop & State	2002-03	2003-04	2004-05 Forecast
	1,000 Cartons		
ORANGES: 1/			
California, All	124,000	104,000	128,000
Navel & Misc. 2/	84,000	76,000	88,000
Valencia	40,000	28,000	40,000
Florida	406,000	484,000	306,000
Texas 2/	3,140	3,300	3,500
Arizona 2/	940	940	860
ALL U.S. ORANGES	534,080	592,240	438,360
GRAPEFRUIT: 3/			
California, All 2/	11,200	10,800	10,600
Florida	77,400	81,800	26,000
Texas 2/	11,300	11,400	12,400
Arizona 2/	260	280	360
ALL U.S. GRAPEFRUIT	100,160	104,280	49,360
LEMONS: 4/			
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: 5/			
California 2/ 6/	5,600	5,400	5,800
Florida 7/	11,000	13,000	9,000
Arizona 2/ 6/	860	1,380	900
ALL U.S. TANGERINES	17,460	19,780	15,700

- 1/ ORANGES: California and Arizona, 1 carton = 37.5 lbs.; Florida, 1 carton = 45 lbs.; Texas, 1 carton = 42.5 lbs.
- 2/ Estimate for current year carried forward from previous forecast.
- 3/ GRAPEFRUIT: Arizona and California, 1 carton = 33.5 lbs.; Florida, 1 carton = 42.5 lbs.; Texas, 1 carton = 40 lbs.
- 4/ LEMONS: All, 1 carton = 38 lbs.
- 5/ TANGERINES: California and Arizona, 1 carton = 37.5 lbs.; Florida, 1 carton = 47.5 lbs.
- 6/ Includes tangelos, tangerines, and tangors.
- 7/ Varieties for 2002-03 include Fallglo, Sunburst, and Honey.

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