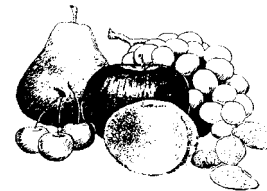


California Fruit & Nut Review



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JANUARY CROP COMMENTS

Heavy rains at the beginning of January halted fieldwork in orchards and vineyards across the State. Some orchards experienced light damage from rains and high winds, mainly downed trees. Many tree fruit growers also began expressing concern over the mild winter weather thus far. The warm temperatures this winter have not allowed adequate chill hours and have caused fruit trees in some areas to begin blooming prematurely. Buds were swelling in many of the early tree varieties by mid-month and the use of per-emergent herbicides and dormant sprays increased. Many grape vineyards were reported to have crews that were pruning, tying canes, applying herbicides, and replacing stakes and trellis wires. A few growers continued to remove older vines and trees in order to plant new vines and trees. Planting blueberries and raspberries began in the San Joaquin Valley. Growers began to place bee hives in almond orchards during January. Dormant season fieldwork continued in nut orchards as field conditions permitted. Losses were reported in several almond orchards due to the wet conditions at the beginning of the month. Crews were seen cutting up downed trees for firewood. A few young walnut orchards were also severely damaged by flood water in Yuba County. Pruning and brush shredding continued in olive orchards. A few olive groves in the Sanger District were harvested for oil.

Rain and fog during much of the month caused problems with scheduling the citrus harvest. Navel orange harvest continued as field conditions allowed, but problems with puff and crease increased grade-outs at packing houses. Lemon harvest gained momentum, while pummelo, mandarin, and tangerine harvests continued. Approximately one-third of the mandarin orange crop in Yuba County was lost from the early-January flooding since growers will not market any fruit that the flood water covered. Blood orange harvest increased. Juice processing plants continued to run at full capacity, due to the high volume of grade-outs.

FLORIDA CITRUS

Weather during January was generally warm and dry in Florida citrus producing areas. Two-tenths of an inch of rain was recorded in the north and just over one-half inch was recorded in the western coastal citrus region. Most areas recorded at least a few days each week with temperatures in the low 80s. Growers in all areas irrigated and began applying fertilizer and herbicides after harvest. Some growers also hedged and topped trees. Harvest of early and mid-season oranges was delayed while some growers waited for maturity and for acid-to-solid ratios to reach more desirable levels. Grapefruit harvest has been steady since before the beginning of the year, with increasing quantities going to processing during the last couple of weeks. Harvest of Honey tangerines and Temples began with most fruit destined for the fresh market. All major processing plants have opened, with the exception of one that may not open at all this season.

CALIFORNIA CITRUS CROPS FORECAST MONTHS, 2005-06 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
Tangerines		X		X			X			X

1/ Navel Objective Measurement was released September 12, 2005. 2/ Valencia Objective Measurement release March 10, 2006.

CALIFORNIA NON CITRUS CROPS FORECAST MONTHS, 2006 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 11, 2006. 2/ Plums, Dried (Prunes) Probability Survey released June 2, 2006. 3/ Almond Subjective Forecast Report released May 10, 2006. 4/ Almond Objective Measurement tentative release June 29, 2006. 5/ Walnut Objective Measurement tentative release September 1, 2006.

CALIFORNIA NUTS: ACREAGE, PRODUCTION, PRICE AND VALUE, 2004-05

Crop	Year	Bearing Acreage	Yield	Total Production	Value of Utilized Production	
			Per Bearing Acre 1/ Pounds		Million Pounds	Grower Return Dollars Per Pound
Almonds, Shelled 2/	2004	570,000	1,760	1,005.0	2.21	2,189,005
	2005	580,000	1,550	900.0	3.08	2,724,876
Pistachios, In-Shell	2004	93,000	3,730	347.0	1.34	464,980
	2005	98,000	2,890	283.0	2.03	574,490
Pecans, In-Shell	2004	2,600	1,350	3.5	2.21	7,735
	2005	2,700	1,370	3.7	1.62	5,994
			Tons	Thousand Tons	Dollars/Ton	\$1,000
Walnuts, In-Shell 3/	2004	217,000	1.50	325,000	1,390	451,750
	2005	219,000	1.62	355,000	---	---

1/ Yield is based on utilized production. 2/ Price and value are based on the edible portion of the crop only. Production includes inedible quantities of no value as follows: 2004 - 14.5 million pounds and 2005 - 15.3 million pounds. 3/ Grower return and total value for the 2005 crop year will be released July 6, 2006.

CALIFORNIA NON-CITRUS FRUITS: ACREAGE, PRODUCTION, PRICE AND VALUE, 2004-05

Crop	Year	Bearing Acreage	Yield	Total Production	Value of Utilized Production	
			Per Bearing Acre 1/ Tons		Thousand Tons	Price Per Ton Dollars
Apples	2004	26,000	6.83	177.5	298.00	52,975
	2005	25,000	7.40	185.0	440.00	81,555
Apricots	2004	16,000	5.88	94.0	334.00	28,575
	2005	14,500	5.21	75.5	495.00	34,904
Avocados	2003-04	60,500	3.57	216.0	1,760.00	380,160
	2004-05	62,000	2.44	151.0	1,840.00	277,840
Cherries, Sweet	2004	26,000	2.81	73.0	1,750.00	123,156
	2005	27,000	1.95	52.7	1,740.00	84,751
Dates	2004	4,700	3.64	17.1	2,260.00	38,646
	2005	4,600	3.61	16.6	2,000.00	33,200
Figs 2/ 3/	2004	12,800	3.99	51.1	396.00	20,214
	2005	12,300	4.14	50.9	---	---
Grapes, All	2004	800,000	7.03	5,623.0	492.00	2,764,534
	2005	800,000	7.66	6,130.0	445.00	2,727,406
Raisin Type	2004	244,000	8.35	2,038.0	306.00	624,600
	2005	242,000	8.68	2,100.0	283.00	593,680
Table Type	2004	83,000	9.28	770.0	695.00	535,009
	2005	84,000	9.88	830.0	373.00	309,576
Wine Type	2004	473,000	5.95	2,815.0	570.00	1,604,925
	2005	474,000	6.75	3,200.0	570.00	1,824,150
Kiwifruit 3/	2004	4,500	5.93	26.7	809.00	19,977
	2005	4,500	9.24	41.6	---	---
Nectarines 4/	2004	36,500	7.37	269.0	342.00	86,184
	2005	36,500	6.55	239.0	519.00	124,041
Olives	2004	32,000	3.25	104.0	571.00	59,379
	2005	32,000	4.34	139.0	548.00	79,126
Peaches, All	2004	69,000	14.10	975.0	270.00	251,254
	2005	66,400	13.10	869.0	321.00	279,177
Clingstone	2004	32,000	16.80	539.0	263.00	141,494
	2005	30,400	15.90	484.0	252.00	122,129
Freestone	2004	37,000	11.80	436.0	281.00	109,760
	2005	36,000	10.70	385.0	408.00	157,048
Pears, All	2004	17,000	15.90	271.0	297.00	80,432
	2005	16,000	12.50	200.0	399.00	79,762
Bartlett 5/	2004	13,000	17.20	223.0	252.00	56,288
	2005	12,000	13.70	164.0	301.00	49,306
Other than Bartlett 6/	2004	4,000	12.00	48.0	503.00	24,144
	2005	4,000	9.00	36.0	846.00	30,456
Plums 7/	2004	36,000	4.33	156.0	516.00	74,347
	2005	36,000	4.75	171.0	551.00	94,163
Plums, Dried	2004	70,000	0.70	49.0	1,500.00	72,000
	2005	67,000	1.34	90.0	1,500.00	130,500
			Cwt. 8/	1,000 Cwt.	Price Per Cwt.	
Berries, Blueberries 9/	2004	---	---	---	---	---
	2005	1,800	31.00	55.8	446.00	24,886
Boysenberries	2004	300	100.00	30.0	120.00	3,600
	2005	310	90.30	28.0	133.00	3,724
Raspberries	2004	4,100	220.00	900.0	209.00	188,100
	2005	4,200	196.00	825.0	199.00	164,175
Strawberries	2004	33,200	590.00	19,588.0	61.50	1,205,513
	2005	34,300	600.00	20,580.0	53.90	1,110,174

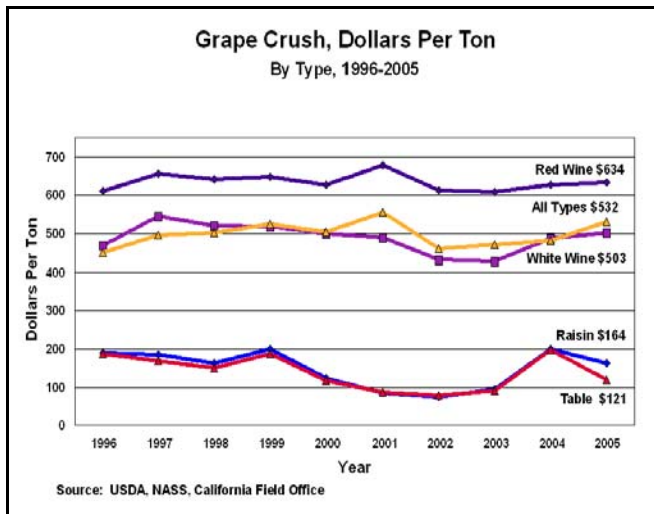
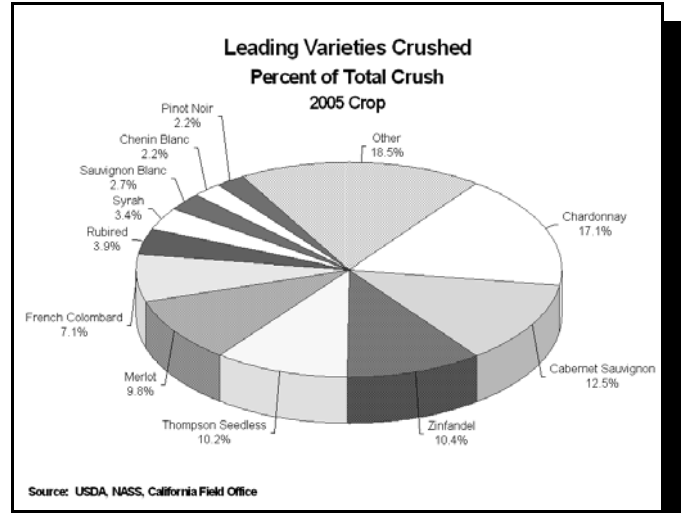
1/ Yield is based on total production. 2/ Small quantities of canned figs are included in fresh to avoid disclosure of individual operations. 3/ Price estimates for 2005 will be published on July 6, 2006. 4/ Small quantities of processed nectarines are included in fresh to avoid disclosure of individual operations. 5/ Processed mostly canned, but includes small quantities dried. 6/ Processed mostly juice, but includes small quantities canned. 7/ Small quantities of processed plums are included in fresh to avoid disclosure of individual operations. 8/ Yield is based on utilized production for Blueberries, Boysenberries, and Raspberries. 9/ Estimate began in 2005.

PRELIMINARY GRAPE CRUSH REPORT

The 2005 crush totaled a record 4,318,083 tons, up 19 percent from the 2004 crush of 3,615,278 tons. Red wine varieties accounted for the largest share of all grapes crushed, at 2,220,096 tons, up 35 percent from 2004. The 2005 white wine variety crush totaled 1,524,404 tons, up 34 percent from 2004. Tons crushed of raisin type varieties totaled 467,477, down 36 percent from 2004, while tons crushed of table type varieties totaled 106,106, down 6 percent from 2004. (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 2005 season, this total was 544,263 tons, approximately 13 percent of the 2005 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.

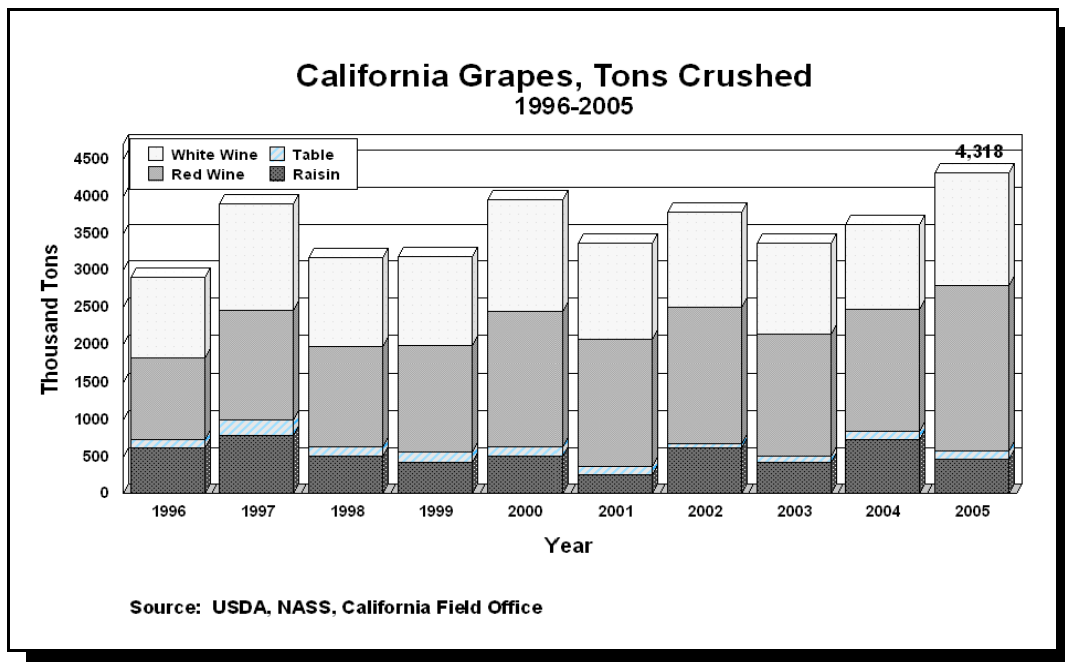
California grape growers received prices in 2005 for raisin and table grapes that were, on average, below the 2004 prices, while the prices received for red and white wine were, on average, above the 2004 prices. The 2005 average price of all varieties was \$531.65, up 10 percent from 2004. Average prices for the 2005 crop by type were as follows: red wine grapes, \$634.40, up 1 percent from 2004; white wine grapes, \$503.15, up 3 percent from 2004; raisin grapes, \$164.24, down 18 percent; and table grapes, \$121.21, down 39 percent. These price levels have not been adjusted for inflation.



LEADING GRAPE VARIETIES AND DISTRICTS

In 2005, Chardonnay accounted for the largest percentage of crush volume with 17.1 percent. Cabernet Sauvignon accounted for the second leading percentage of crush with 12.5 percent of the total crush. The next eight highest percentages of grapes crushed were all wine varieties, with the exception of Thompson Seedless.

Grapes produced in District 4 (Napa County) received the highest average price of \$2,989.36 per ton, up 2 percent from 2004. District 3 (Sonoma and Marin counties) received the second highest return of \$1,868.17, virtually unchanged from 2004. The 2005 Chardonnay price of \$712.12 was up 3 percent from 2004, while the Cabernet Sauvignon price of \$939.23 was down 4 percent from 2004. The 2005 average price for Merlot was \$728.99, down 9 percent from 2004, while the Zinfandel average price of \$471.20 was down less than 1 percent from 2004.



CITRUS FRUIT PRODUCTION

Crop and State	2003-04	2004-05	Forecast 2005-06
	1,000 Cartons		
ORANGES: 1/			
California, All	101,000	122,000	108,000
Navel & Misc.	79,000	86,000	84,000
Valencia	22,000	36,000	24,000
Florida	484,000	299,200	316,000
Texas	3,300	3,540	3,060
Arizona	940	860	900
ALL U.S. ORANGES	589,240	425,600	427,960
GRAPEFRUIT: 2/			
California	11,600	11,600	12,000
Florida	81,800	25,600	32,000
Texas	11,400	13,200	10,200
Arizona	280	280	200
ALL U.S. GRAPEFRUIT	105,080	50,680	54,400
LEMONS: 3/			
California	36,000	38,000	38,000
Arizona	6,000	4,800	7,600
ALL U.S. LEMONS	42,000	42,800	45,600
TANGERINES: 4/			
California 5/	4,400	5,600	6,200
Florida	13,000	8,900	10,400
Arizona	1,380	800	1,000
ALL U.S. TANGERINES	18,780	15,300	17,600

The 2005 **PRELIMINARY CALIFORNIA GRAPE CRUSH REPORT** is now available to GRAPE GROWERS free-of-charge. All others may obtain a copy by calling the USDA, NASS, California Field Office 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 2005 **FINAL GRAPE CRUSH REPORT** will be available on March 10, 2006 to GRAPE GROWERS free-of-charge. All others may obtain a copy (book or diskette) by calling the USDA, NASS, California Field Office 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, or Excel Spreadsheet) on the order.

Both the **PRELIMINARY AND FINAL GRAPE CRUSH REPORTS** will be available free-of-charge on the Internet at 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.