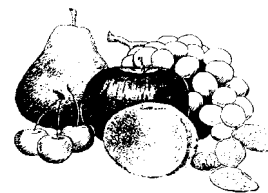


California Fruit & Nut Review



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FEBRUARY CROP COMMENTS

General maintenance activities were underway during February in many grape vineyards as growers replaced stakes and trellis wire, pruned vines, and shredded canes. Several grape growers were busy discing rows and applying herbicides to the surrounding berms for weed control. Insecticides were applied to some vineyards to control the vine mealybug. Warm temperatures at the beginning of the month caused some early varieties of tree fruit to prematurely begin pushing buds. Freezing temperatures shortly followed, raising concerns about crop damage to these early variety fruit crops. Despite the cool temperatures, some early-variety deciduous fruit trees began leafing out near the end of the month. Early almond trees were also starting to bloom at the beginning of the month. By month's end, most

early variety almond orchards were in full bloom, and later maturing varieties began blooming. A few orchards were treated with fungicides to prevent blossom rot. The freezing temperatures during the month caused some damage to early almond varieties, but the overall impact remains to be determined. Bees were busy working to pollinate the almond trees, but the cool temperatures slowed their production. Replanting of almond, walnut, and pistachio orchards continued. New peach orchards were planted in the San Joaquin Valley. Strawberry plants continued to show good growth in the San Joaquin Valley, and harvesting began along the central coast.

Harvesting of Navel oranges, grapefruit, lemons, mandarins, tangelos, and tangerines continued during February with good yields reported. Growers applied copper, lime, and zinc to citrus groves in order to control fungal disease and to comply with export requirements. Harvest began of early variety Valencia oranges, but some maturity problems were reported. Citrus growers were busy running water and wind machines when temperatures dropped below freezing. Navel demand in the domestic and export markets was moderate. Puff and rind problems continued to be problematic in Navels resulting in lower than normal pack-outs.

FRUIT AND NUT STATISTICS AT A GLANCE

Crop	Bearing Acreage		Yield Per Acre		Estimated Production		Production Percent Change	Next Crop Update
	2004	2005	2004	2005	2004	2005		
	Acres		Pounds		1,000 Pounds			
NUT CROPS 1/								
Almonds (Shelled) 2/ 3/	570,000	580,000	1,760	1,550	1,005,000	900,000	-10	May 1, 2006
Pecans	2,600	2,700	1,350	1,370	3,500	3,700	6	July 6, 2006
Pistachio (In-Shell)								
Marketable In-Shell	---	---	---	---	254,000	215,000	-15	
Shelling Stock	---	---	---	---	93,000	68,000	-27	
Total	93,000	98,000	3,730	2,890	347,000	283,000	-18	July 6, 2006
Walnuts (In-Shell) 4/	217,000	219,000	1.50	1.62	325.0	355.0	9	July 6, 2006
FRUIT CROPS 1/								
Apples	26,000	25,000	6.83	7.40	177.5	185.0	4	July 6, 2006
Apricots	16,000	14,500	5.88	5.21	94.0	75.5	-20	June 9, 2006
Cherries	26,000	27,000	2.81	1.95	73.0	52.7	-28	June 9, 2006
Grapes, Raisin 3/ 5/	244,000	242,000	8.35	8.68	2,038.0	2,100.0	3	July 6, 2006
Grapes, Table.	83,000	84,000	9.28	9.88	770.0	830.0	8	July 6, 2006
Grapes, Wine	473,000	474,000	5.95	6.75	2,815.0	3,200.0	14	July 6, 2006
Grapes, All 3/ 5/	800,000	800,000	7.03	7.66	5,623.0	6,130.0	9	July 6, 2006
Olives	32,000	32,000	3.25	4.34	104.0	139.0	34	July 6, 2006
Peaches, Clingstone	32,000	30,400	16.80	15.90	539.0	484.0	-10	May 12, 2006
Peaches, Freestone	37,000	36,000	11.80	10.70	436.0	385.0	-12	May 12, 2006
Pears, Bartlett	13,000	12,000	17.20	13.70	223.0	164.0	-26	June 9, 2006
Pears, Other	4,000	4,000	12.00	9.00	48.0	36.0	-25	July 6, 2006
Plums, Dried 6/	70,000	67,000	0.70	1.34	49.0	90.0	84	May 25, 2006
BERRIES								
Strawberries	34,300	35,800	600	---	20,580	---		April 3, 2006
CITRUS CROPS 7/								
Grapefruit	12,500	12,500	928	960	11,600	12,000	3	April 10, 2006
Lemons	44,000	42,000	864	905	38,000	38,000	N/A	April 10, 2006
Oranges, Navel	130,500	131,000	659	641	86,000	84,000	-2	April 10, 2006
Oranges, Valencia 8/	45,500	45,000	791	489	36,000	22,000	-39	April 10, 2006
Tangerines 9/	11,300	12,000	496	517	5,600	6,200	11	April 10, 2006

1/ Revised 2005 data.

2/ Almond Subjective Forecast Report released May 10 at 12:00 p.m. PDT. Almond Objective Measurement Report released June 29 at 12:00 p.m. PDT.

3/ Revised 2004 data.

4/ Walnut Objective Measurement Report released September 1 at 12:00 p.m. PDT.

5/ Raisin Grape Objective Measurement Report released August 11 at 6:30 a.m. PDT.

6/ Dried Plum Forecast Report (Prunes) released June 2 at 12:00 p.m. PDT.

7/ Grapefruit -- 33.5 lbs. per carton; Lemons -- 38.0 lbs. per carton; Oranges -- 37.5 lbs. per carton; Tangerines -- 37.5 lbs. per carton.

8/ Revised 2005-06 data.

9/ 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	
	2004	2005	2004	2005	2004	2005	2004	2005	2004	2005	2004	2005
	Acres		Cwt.		1,000 Cwt.		Dollars		1,000 Dollars			
California	33,200	34,300	33,200	34,300	590	600	19,588	20,580	61.50	53.90	1,205,513	1,110,174
Florida	7,100	7,300	7,100	7,300	230	245	1,633	1,789	109.00	110.00	177,997	196,790
Michigan	1,100	1,100	900	1,000	46	52	41	52	97.70	93.80	4,005	4,878
New York	1,700	1,700	1,500	1,500	43	35	65	52	160.00	155.00	10,400	8,060
North Carolina	1,700	1,600	1,600	1,500	110	130	176	195	90.00	95.00	15,840	18,525
Ohio	1,000	1,100	800	800	48	53	38	42	134.00	137.00	5,092	5,754
Oregon	3,300	3,100	2,400	2,200	135	115	324	250	48.90	54.70	15,839	13,680
Pennsylvania	1,300	1,300	1,300	1,300	61	54	79	70	164.00	183.00	12,956	12,810
Washington	1,700	1,500	1,700	1,500	90	100	153	150	47.80	46.30	7,310	6,940
Wisconsin	1,000	900	900	800	46	51	41	41	125.00	133.00	5,125	5,453
U.S. Total	53,100	53,900	51,400	52,200	431	445	22,138	23,221	66.00	59.60	1,460,077	1,383,064

BERRIES: ACREAGE, YIELD, PRODUCTION, PRICE AND VALUE BY CROP, STATE AND UNITED STATES, 2003-05

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
Blueberries						
California ^{2/}	2003	---	---	---	---	---
	2004	---	---	---	---	---
	2005	1,800	3,100	5,580	4.46	24,886
Oregon	2003	3,300	7,240	23,900	0.87	20,786
	2004	3,500	9,710	34,000	0.81	27,418
	2005	3,800	8,530	32,400	0.94	30,432
Washington	2003	2,200	6,000	13,200	0.91	12,068
	2004	2,400	7,500	18,000	0.89	16,000
	2005	2,800	7,000	19,600	0.98	19,160
United States	2003	41,670	4,510	189,650	1.17	220,649
	2004	44,430	5,120	228,880	1.21	275,963
	2005	48,310	4,810	233,030	1.39	323,788
Boysenberries						
California	2003	200	6,000	1,200	0.89	1,069
	2004	300	10,000	3,000	1.20	3,600
	2005	310	9,030	2,800	1.33	3,724
Oregon	2003	800	3,880	3,100	0.86	2,656
	2004	750	4,270	3,200	1.12	3,568
	2005	600	3,830	2,330	1.49	3,434
United States	2003	1,000	4,300	4,300	0.87	3,725
	2004	1,050	5,900	6,200	1.16	7,168
	2005	910	5,600	5,130	1.40	7,158
Black Raspberries						
Oregon	2003	1,100	2,090	2,400	1.36	3,132
	2004	1,100	2,160	2,380	2.25	5,357
	2005	1,300	3,590	4,670	2.46	11,476
Red Raspberries						
Oregon	2003	2,000	2,600	5,200	0.81	4,220
	2004	1,900	3,530	6,700	0.86	5,763
	2005	1,900	3,680	7,000	0.83	5,777
Washington	2003	9,200	7,300	67,700	0.54	36,554
	2004	9,000	6,600	59,400	0.77	45,960
	2005	9,500	7,400	70,300	0.56	39,275
United States	2003	11,200	6,460	72,900	0.56	40,774
	2004	10,900	6,060	66,100	0.78	51,723
	2005	11,400	6,780	77,300	0.58	45,052
All Raspberries						
California	2003	3,000	20,500	61,500	2.08	127,920
	2004	4,100	22,000	90,000	2.09	188,100
	2005	4,200	19,600	82,500	1.99	164,175

^{1/} Yields based on utilized production.

^{2/} Estimates began in 2005.

FINAL GRAPE CRUSH REPORT

The 2005 crush totaled 4,328,840 tons, up 20 percent from the 2004 crush of 3,615,278 tons. Red wine varieties accounted for the largest share of all grapes crushed, at 2,234,595 tons, up 36 percent from 2004. The 2005 white wine variety crush totaled 1,520,572 tons, up 34 percent from 2004. Tons crushed of raisin type varieties totaled 467,483, down 36 percent from 2004, while tons crushed of table type varieties totaled 106,190, down 6 percent from 2004.

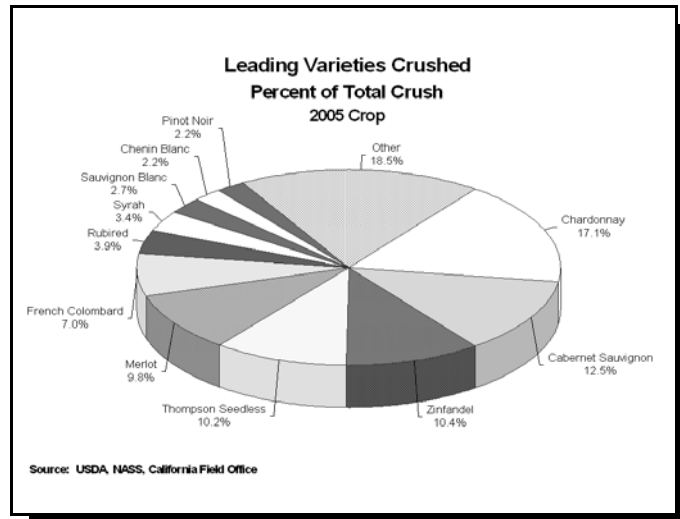
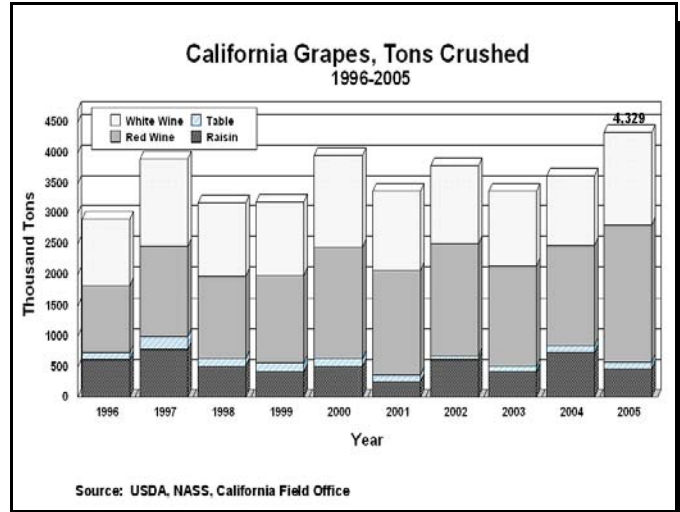
Beginning with the 1999 season, the Grape Crush Report includes the total number of tons crushed for concentrate production. In determining grape tonnage crushed for concentrate production, each processor was required to report the estimated equivalent tons of grapes crushed for grape concentrate. For the 2005 season, this total was 550,296 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 were, on average, above the 2004 prices. The 2005 average price of all varieties was \$532.78, up 10 percent from 2004. Average prices for the 2005 crop by type were as follows: red wine grapes, \$633.48, up 1 percent from 2004; white wine grapes, \$506.37, up 4 percent from 2004; raisin grapes, \$164.25, down 18 percent; and table grapes, \$121.36, 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 \$2,990.23 per ton, up 2 percent from 2004. District 3 (Sonoma and Marin counties) received the second highest return of \$1,871.23, virtually unchanged from 2004. The 2005 Chardonnay price of \$713.98 was up 3 percent from 2004, while the 2005 Cabernet Sauvignon price of \$938.12 was down 4 percent from 2004. The 2005 average price for Merlot was \$729.53, down 9 percent from 2004, while the Zinfandel average price of \$472.08 was down less than 1 percent from 2004.



CALIFORNIA GRAPE CRUSH TONNAGE AND PRICE, 1988-2005

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
2005	467	164	106	121	2,235	633	1,521	506	4,329	533

Source: USDA, NASS, California Field Office

**CALIFORNIA VALENCIA ORANGE
OBJECTIVE MEASUREMENT REPORT, 2005-06**

The 2005-06 Valencia orange forecast is 22.0 million (37.5-pound) cartons, 39 percent below last season's estimated total of 36.0 million cartons. Objective measurement survey data indicated an average fruit set of 492 oranges per tree in the State of California. Fruit sizes have decreased this year, with an average diameter of 2.640 inches.

The Valencia Orange Objective Measurement Survey was reinstated in the year 2000. This year, Valencia oranges were sampled from 650 groves or blocks. The sample blocks were distributed in proportion to the bearing acres in each county and the year the trees were planted. Two trees were sampled in each selected block. Sampling was done by measuring branches, randomly selecting a branch at that stage, then moving to the next stage and repeating the steps until a terminal branch was selected. All oranges on intermediate and terminal branches were counted. Two separate random counts were taken in each tree. The two counts were mathematically combined to arrive at an estimated total fruit count per tree.

CALIFORNIA VALENCIA ORANGE DATA

Crop Year	Number of Sampled Groves	Bearing Acres	Average			
			Trees Per Acre	Set Per Tree	Diameter as of March 1	Diameter as of July 1
					<i>(Inches)</i>	
2000-01	782	68,000	125	477	2.614	2.867
2001-02	804	65,000	126	518	2.654	2.831
2002-03	780	60,000	126	653	2.584	2.750
2003-04	785	52,000	126	392	2.707	2.870
2004-05	589	45,500	123	807	2.644	2.807
2005-06	650	45,000	123	492	2.640	2.800 <u>1/</u>

1/ Projected