



California Fruit & Nut Review

Cooperating with the California Department of Food and Agriculture

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JULY GENERAL COMMENTS

California's grape harvest advanced during July. Flame Seedless, Thompson Seedless, Diamond Muscat, Black Emerald, Perlette, Red Flame, Red Globe, and Summer Royal were the primary varieties harvested. Grape yields were expected to be lower in areas affected by the April freeze. There was also concern that smoke from the California wild fires might affect grape quality. Stone fruit harvest of apricots, peaches, plums, pluots, and nectarines continued. Other fruits harvested included Zante currants, Asian pears, and figs. Persimmons were thinned, and harvests of boysenberries and

blueberries were winding down. Olive trees were forming fruit. The olive crop was reported to be irregular in some areas, with some groves too light to harvest. Irrigation measures increased in olive groves due to the heat. Tree nut fruits were developing normally. Almond harvest began in Kern County; trees were shaken, and nuts were swept into rows. Elsewhere, hull split continued, and branches were being propped due to the heavy crop. Some almond orchards experienced tree and limb fall due to the heavy weight of nut fruits. Maintenance sprays for codling moth and mites were applied to walnut trees. White wash was also applied to protect walnuts from sunburn. The heavy crop load continued to break limbs in walnut groves. A large pistachio crop was also expected.

Irrigation measures increased in citrus groves during July due to the high temperatures. By the end of the month, Valencia harvest was over 50 percent complete in some areas and Navel orange harvest had come to an end. Lemons and grapefruit were also harvested.

FRUIT AND NUT STATISTICS AT A GLANCE

Crop	Bearing Acreage		Yield Per Acre		Estimated Production		Production Percent Change	Next Crop Update
	2007	2008	2007	2008	2007	2008		
NUT CROPS	<i>Acres</i>		<i>Pounds</i>		<i>1,000 Pounds</i>			
Almonds (Shelled)	615,000	660,000	2,260	2,270	1,390,000	1,500,000	8	January 2009
Pecans	3,100	---	1,420	---	4,400	---		October 10, 2008
Pistachio (In-Shell)								
Marketable In-Shell	---	---	---	---	333,000	---		
Shelling Stock	---	---	---	---	83,000	---		
Total	114,000	---	3,650	---	416,000	---		January 2009
			<i>Tons</i>		<i>1,000 Tons</i>			
Walnuts (In-Shell) 1/	218,000	---	1.49	---	325.0	---		Sept. 4, 2008
FRUIT CROPS								
Apples	20,500	19,500	8.41	8.21	172.5	160.0	-7	January 2009
Apricots	13,800	13,400	5.87	6.12	81.0	82.0	1	January 2009
Cherries	30,000	30,000	2.83	2.87	85.0	86.0	1	January 2009
Grapes, Raisin	227,000	227,000	9.40	9.69	2,133.0	2,200.0	3	October 10, 2008
Grapes, Table 2/	82,000	82,000	9.65	9.76	791.0	800.0	1	October 10, 2008
Grapes, Wine	480,000	480,000	6.85	7.08	3,287.0	3,400.0	3	October 10, 2008
Grapes, All	789,000	789,000	7.87	8.11	6,211.0	6,400.0	3	October 10, 2008
Olives	31,000	31,000	4.27	2.10	132.5	65.0	-51	January 2009
Peaches, Clingstone 2/	26,500	25,300	19.00	15.00	503.0	380.0	-24	January 2009
Peaches, Freestone 2/	36,000	36,000	12.40	11.90	446.0	430.0	-4	January 2009
Pears, Bartlett	12,000	12,000	16.80	16.70	201.0	200.0	NC	January 2009
Pears, Other	4,000	4,000	10.50	11.00	42.0	44.0	5	January 2009
Prunes (Dried Weight)	65,000	65,000	1.28	1.85	83.0	120.0	45	January 2009
BERRIES			<i>Cwt.</i>		<i>1,000 Cwt.</i>			
Strawberries 3/	35,500	36,700	605	600	21,540	22,020	2	January 2009
CITRUS CROPS 4/	2006-07	2007-08	2006-07	2007-08	2006-07	2007-08		
			<i>Cartons</i>		<i>1,000 Cartons</i>			
Grapefruit	11,500	11,000	957	1,018	11,000	11,200	2	Sept. 25, 2008
Lemons	45,000	44,000	822	795	37,000	35,000	-5	Sept. 25, 2008
Oranges, Navel 5/	136,000	137,000	507	723	69,000	99,000	43	Sept. 12, 2008
Oranges, Valencia	43,000	43,000	535	744	23,000	32,000	39	Sept. 25, 2008
Tangerines 6/	16,000	18,000	438	633	7,000	11,400	63	Sept. 25, 2008

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

2/ "Estimated Production" for 2008 was carried forward from July.

3/ Includes fresh market and processing.

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

5/ Navel Orange Objective Measurement Report will be released September 12 at 5:30 a.m. PDT.

6/ Includes tangelos, tangerines, and tangors.

FRUIT ACREAGE AND PRODUCTION

Apples - California's 2008 apple crop forecast is 160 thousand tons, down 7 percent from 2007. Acreage is estimated at 19.5 thousand acres, resulting in a yield of 8.21 tons per acre. California growers are expecting a good apple crop for the 2008 crop year. A frost in April hurt some growers, but overall quality and size are very good. The crop had low pest and disease pressure. Apple acreage continues to decrease, but new varieties and grafts are coming into production.

Grapes - Wine-type variety grape production for California is forecast at 3.40 million tons, up 6 percent from both the July forecast and from the 2007 crop. Wine grape growers reported improved yield prospects from last month's survey. The table-type grape production is expected to total 800 thousand tons, unchanged from the July forecast and from last year. The California raisin-type variety grape forecast is 2.20 million tons, up 7 percent from the July forecast and up 3 percent from last year. Harvest of table-type grapes for fresh market was complete in the Coachella Valley. Harvest continued for fresh use in the Kern District and other areas of the San Joaquin Valley. Flame and Thompson Seedless, Diamond Muscat, Black Emerald, Perlette, Red Globe, and Summer Royal varieties have started harvest. Fruit quality is excellent, although berry size is not as large as in some seasons.

FLORIDA CITRUS

In Florida, various amounts of rainfall were received in and around citrus-producing areas during the month of July. Canals and lakes were mostly full, and water was plentiful. Temperatures were warm during the month, reaching into the lower 90's on most days. The hot, wet weather resulted in a deep soaking of most of the groves in the State, and aided in the growth of foliage and new fruit.

Overall, conditions were good in well-managed groves, and fruit were progressing well. By the end of the month, orange and grapefruit sizes were varying between golf ball and baseball size. Valencia orange harvest ended early in the month. Orchard work underway included applying summer oils, cleaning ditches, fertilizing, mowing, and some hedging. Growers were also combining efforts to address canker and psyllid control. Some growers abandoned or pushed severely infected groves.

CALIFORNIA OLIVE FORECAST FOR 2008

The 2008 California olive crop forecast is 65,000 tons, down 49 percent from last year's crop of 132,500 tons. Bearing acreage is estimated at 31,000 for a yield of 2.10 tons per acre, compared with last year's yield of 4.27 tons. Of the total production, an estimated 53,000 tons will be utilized for canning, and the remaining 12,000 tons are expected to be harvested for oil or specialty products.

The 2008 California olive crop is turning out light. Lack of rains during the spring months caused some areas to be water stressed. There were also less than ideal weather conditions during the blooming period. The erratic temperature swings from hot to cold and high winds during bloom left many trees with a spotty set. The bloom period stretched out over approximately five weeks. The April freeze damaged crops, which became evident with new growth. Some growers were evaluating whether the spotty crop will make harvest costs prohibitive.

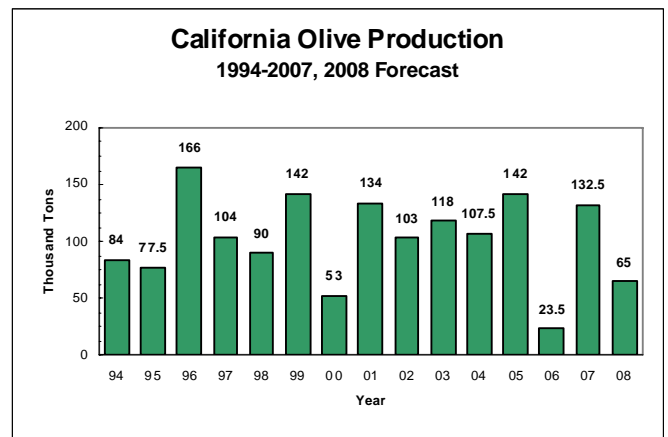
The Manzanillo and Sevillano olive varieties are expected to produce 78.4 and 10.8 percent of the total olive crop, respectively. The remaining 10.8 percent are expected to come from all other varieties.

GRAPE PRODUCTION FOR SELECTED STATES AND U.S.

Crop and State	2006	2007	2008 Forecast
	Tons		
California:			
All Varieties	5,726,000	6,211,000	6,400,000
Wine Varieties	3,176,000	3,287,000	3,400,000
Table Varieties	717,000	791,000	800,000
Raisin Varieties	1,833,000	2,133,000	2,200,000
Michigan	32,500	100,100	78,000
New York	155,000	180,000	165,000
Pennsylvania	82,000	84,000	95,000
Washington	316,000	376,000	375,000
Other States 1/	65,650	66,900	82,100
United States	6,377,150	7,018,000	7,195,100

1/ Includes Arizona, Arkansas, Georgia, Missouri, North Carolina, Ohio, Oregon, Texas, and Virginia.

Pears - The forecast of the 2008 Bartlett pear crop in California is 200 thousand tons, slightly below 2007. The 2008 other pear forecast for California is 44.0 thousand tons, up 5 percent from last year. The California Bartletts began blooming in March. Harvest of Bartlett pears started in mid-July for Sacramento-San Joaquin regions and the first week of August for Lake-Mendocino regions. April's freeze resulted in less damage than earlier expectations. The most damage was found in the Mendocino-Lake regions.



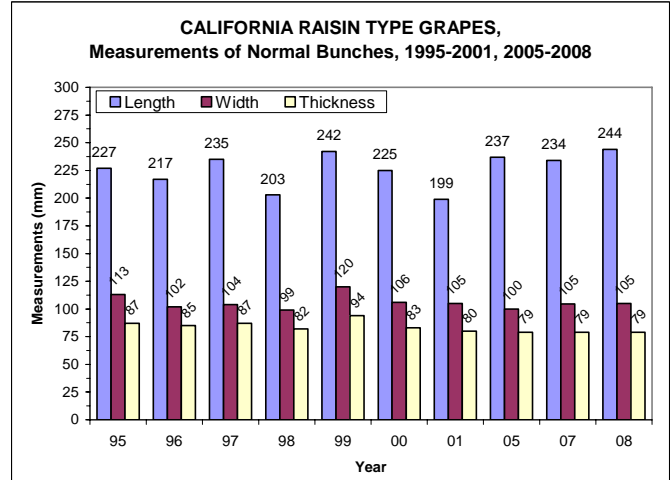
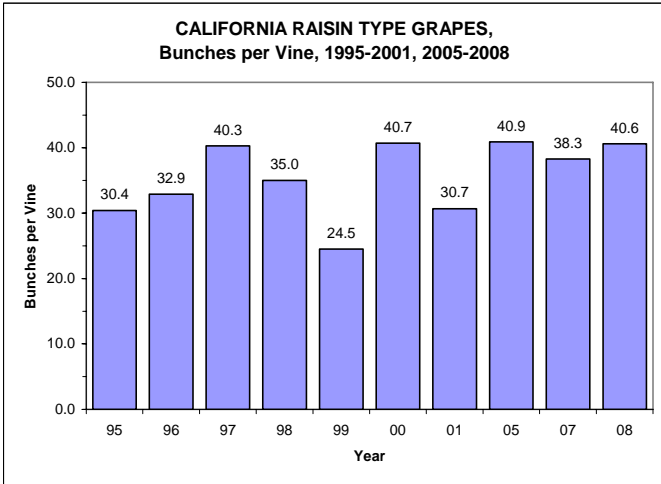
CALIFORNIA RAISIN-TYPE GRAPE FORECAST FOR 2008

The California raisin-type variety grape forecast is 2.20 million tons, up 7 percent from the July forecast. Based on the objective measurement survey, bunches per vine totaled 40.6 compared to 38.3 recorded in 2007. Acreage of bearing age is 227,000.

Weather has been favorable during the growing season thus far, and vines look good. The raisin crop is behind, but appears to be catching up and maturing nicely. Harvest for raisin production has not yet begun.

The 2008 California raisin-type grape crop is shaping up to be an average to slightly above average sized crop. A frost in April hit some grape growers hard, but raisin variety grapes had minimal damage. Water was also a concern for some growers, especially in the Fresno area. Pest and disease pressure was low this year.

The forecast is based on the results of the Raisin Grape Objective Measurement (O.M.) Survey conducted in July. The Raisin Administrative Committee provided funding for the 2008 Raisin O.M. Survey.



California Raisin Grape Objective Measurement Survey Results and Official Estimates, 1993-2008

Year	Vines Sampled	Average Bunches Per Vine	Normal Bunches Measured	Average Normal Bunch			Official Estimate		
				Length	Width	Thickness	Bearing 1/	Yield Per Acre 1/	Production
				mm			Acre	Tons	1,000 Tons
1993	248	32	952	222	106	91	266,000	9.57	2,354
1994	330	35	1,342	229	105	85	270,000	8.85	2,389
1995	294	30	1,054	227	113	87	268,000	9.27	2,252
1996	362	33	1,396	217	102	85	270,000	8.12	2,192
1997	376	40	1,763	235	104	87	270,000	10.70	2,883
1998	313	35	1,245	203	99	82	275,000	7.55	2,077
1999	303	25	863	242	120	94	279,000	7.61	2,122
2000	294	41	1,341	225	106	83	280,000	10.40	2,921
2001	294	31	1,036	199	105	80	235,000	9.43	2,215
2002	---	---	---	---	---	---	246,000	11.40	2,804
2003	---	---	---	---	---	---	255,000	8.71	2,220
2004	---	---	---	---	---	---	244,000	8.35	2,038
2005	319	41	1,430	237	100	79	240,000	9.52	2,285
2006	---	---	---	---	---	---	234,000	7.83	1,833
2007	298	38	1,283	234	105	79	227,000	9.40	2,133
2008	327	41	1,471	244	105	79	227,000	9.69	2,200

1/ The following acreage was enrolled in the Raisin Industry Diversion (RID) Program in the year specified: 1993 – 20,000 acres; 1995 – 25,000 acres; 2001 – 41,000 acres; 2002 – 27,000 acres. These acres were deducted from bearing acreage for yield calculations.