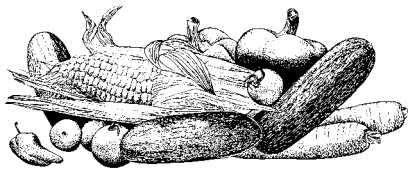
California Vegetable Review



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SUMMER FRESH MARKET VEGETABLE AND MELON ACREAGE

The prospective area for harvest of 11 selected fresh market vegetables during the summer quarter is estimated to be 305,400 acres, up less than 1 percent from last year. Acreage increases in celery, broccoli, sweet corn, bell peppers, tomatoes, snap beans, and carrots more than offset acreage decreases in head lettuce, cauliflower, cucumbers, and cabbage. Area estimated for melon harvest is 110,100 acres, down 2 percent from last year. Cantaloupe area is estimated at 41,200 acres, 5 percent below 2004. Honeydew area, at 14,800 acres, is up 7 percent from last year. Watermelon area, at 54,100 acres, is 3 percent below a year ago.

Broccoli: California's acreage for summer harvest is estimated at 36,600 acres, up 3 percent from last year. Broccoli planting schedules began to recover from the frequent spring rains, which tapered off in May. Cool weather in early May slowed development, but warmer temperatures in June stimulated growth. No major pest or disease problems have been reported.

Cantaloupe: Summer cantaloupe acreage for harvest nationally is estimated at 41,200 acres, down 5 percent from 2004. California's summer melon crop will be harvested from July through September. Cool temperatures slowed maturity, but excellent quality has been reported. Georgia received excessive rainfall this season. Growers report the crop is in fair to good condition. Development of the South Carolina melon crop was slowed by cooler than normal temperatures and below normal precipitation. Growing conditions in Texas have been excellent with a dry spring and very few reports of disease or weather problems. However, increased competition from Mexico has weakened the Texas market, causing some growers to leave melons unharvested in the fields.

Carrots: U.S. acreage for fresh market harvest is estimated at 19,000 acres, up 1 percent from last year. California's crop is progressing well as a result of favorable growing conditions. Baby carrots are still in high demand and there is a growing demand for value added snack pack products. In Michigan, planting went well. By June 6, the fields looked excellent and growers continued irrigating where needed.

Cauliflower: California's acreage for summer harvest is estimated at 8,500 acres, down 6 percent from 2004. Cool weather in early May slowed development, but warmer temperatures in June stimulated growth. No major pest or disease problems have been reported.

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PROCESSING TOMATO ACREAGE AND TONNAGE INTENTIONS

In California, unseasonable rains have delayed planting of processing tomatoes. Tomatoes that were planted early have progressed well and will mature on schedule in July. Growers are expected to contract 265,000 acres, 10 percent less than in 2004. Contracted production is expected to be 10.4 million tons, down 8 percent from last year.

Nationally, contracted production is forecast at 11.0 million tons, down 8 percent from last year's comparable States. Area contracted, at 284,600 acres, is down 9 percent from 2004 for comparable States.

PROCESSING TOMATOES BY STATE

State	Area Planted				Contract Change 2005/2004	Production				Contract Change 2005/2004
	2003 Total	2004 Total	2004 Contract 1/	2005 Contract Intentions 1/		2003 Total	2004 Total	2004 Contract 1/	2005 Contract Intentions 1/	
	Acres				Percent	Tons				Percent
California	289,000	301,000	293,000	265,000	90	9,252,000	11,672,000	11,350,000	10,400,000	92
Indiana	8,400	8,400	8,400	8,200	98	202,290	274,810	274,810	251,500	92
Michigan	3,400	3,600	3,600		0	125,400	108,500	108,500		0
Ohio	6,400	6,600	6,500	6,700	4	173,280	177,320	174,460	173,400	99
Other States 2/	2,830	1,630	1,630	4,700	288	66,740	33,780	33,780	145,100	430
U.S.	310,030	321,230	313,130	284,600	91	9,819,710	12,266,410	11,941,550	10,970,000	92

1/ Includes acreage from major brokers.
2/ Data for: 2003 — MD, NJ, and PA; 2004 — MD and NJ; 2005 — MI and NJ. Seasonal forecasts for MD are not available. Estimates to be published in the January 2006 annual report. PA estimates were discontinued in 2004.

SUMMER FRESH MARKET VEGETABLE AND MELON ACREAGE

(Continued from page 1)

Celery: California's summer acreage for harvest is estimated at 5,900 acres, up 4 percent from 2004. In Oxnard, heavy rainfall earlier in the year caused pith and plants to go to seed. There was also an abundance of large celery sizes late in the season. Oxnard production was winding down in mid to late June. Celery production has picked up in the Salinas area with the summer crop in good condition.

Corn, Sweet: Fresh market acreage for harvest nationally is estimated at 114,800 acres, up 3 percent from last year. In California, the summer sweet corn crop in the central and northern San Joaquin Valley was doing well, but lower than normal temperatures may reduce yields. The Illinois crop conditions are favorable. However, development was slowed by a continued lack of moisture. Planting of the Michigan crop progressed well during a cool and dry spring. The northern Lower Peninsula and the Upper Peninsula have been dry all season, while the central Lower Peninsula received adequate rainfall in June. New Jersey planting was 10 days to two weeks behind schedule due to cold and wet conditions. Growing conditions improved by late June, but cool night temperatures have slowed growth and development. The New York crop is on schedule with no major problems reported. The season started rainy, then became hot and dry during the last week of June. Rain returned the first week of July. Planting of the North Carolina crop began under wet conditions, but was completed on schedule. In Ohio, planting was completed ahead of schedule. Early spring was wet and cold throughout the State, but became hot and dry during June. Pennsylvania's early sweet corn development was slowed by cool, wet spring weather and low soil temperatures. Many growers waited until the weather warmed to begin planting, therefore very little corn was in the ground by June 1. Some areas are as much as two weeks behind. In Wisconsin, below average rainfall and temperatures were reported for most of May. Some areas are progressing well, but others have reported slow development due to the cool and dry conditions.

Honeydew: Total fresh market acreage for summer harvest is estimated at 14,800 acres, up 7 percent from last year. Melons in Arizona are doing well this year despite early season cool nights and sporadic hot days during the past few months. The sugar content is slightly lower this year. Harvest of the summer crop began around May 13 and Yuma should finish harvesting by the last week of June. California's crop will be harvested from July to September. Cool temperatures slowed maturity, but excellent quality has been reported.

Lettuce, Head: U.S. acreage for summer harvest is estimated at 44,800 acres, down 9 percent from last year. California's planting conditions have been normal for the summer crop. No significant delays or other problems have been noted. However, greater competition in the lettuce market is prompting growers to cut back on summer acreage this year. Colorado's crop is progressing normally. Most lettuce is grown in the San Luis Valley and is irrigated. Irrigation water is expected to be sufficient, but operators are being conservative with its use.

Tomatoes: Fresh market acreage for summer harvest nationally is estimated at 37,600 acres, up 3 percent from last year. California's summer crop was planted with no major problems reported. The fresh tomato market has been steady, but slow growth of the spring crop led to an increase in demand, especially for the Roma variety. Michigan growers began planting in mid-May and by early June growth was good. Early plantings began to blossom and bear fruit by mid-June. New Jersey had a cold spring with frequent rainfall, which delayed planting of the tomato crop. Cool temperatures in May and June stalled development. The last week of June was warmer, which benefitted the plants. Harvest will start during the first week of July, which is later than usual. New York's crop is on schedule. Development of the Pennsylvania tomato crop was slowed by cool, wet weather until early June when warmer temperatures arrived. Lack of adequate moisture during the first half of June has stressed the plants, especially in non-irrigated fields. Virginia tomato growers delayed planting because of cool and wet spring conditions. Late spring weather in parts of the State was dry. Additional rainfall is needed for good yields and quality.

Watermelon: Total summer acreage for harvest is estimated at 54,100 acres, down 3 percent from 2004. California melon quality is excellent. However, development was slow, due to cool temperatures. Harvest of the summer crop will begin in July. Georgia growers report excessive rainfall this season. Disease problems may become evident if wet conditions continue. Mississippi watermelon planting was complete by June 20. Early harvest began the last week of June. Growers expect a successful crop this season. In South Carolina, watermelon acreage continues to diminish. The principal growing area is the Low Country between Savannah and Charleston. Poor prices last year and continued rapid population growth have caused many farmers to sell their land for development. This year's crop is behind schedule due to cooler weather, which slowed development. The Texas watermelon crop is doing well this season with excellent growing conditions and high quality reported.

SUMMER VEGETABLE AND MELON ACREAGE

Crop and State	Usual Harvest Period	Area Harvested 2003	Area Harvested 2004	Area for Harvest 2005	2005 / 2004
		Acres			Percent
BROCCOLI: 1/					
California	July-Sept.	33,000	35,500	36,600	103
CANTALOUPE:					
California	July-Sept.	34,700	36,200	35,000	97
Georgia	June-Sept.	1,800	2,000	1,900	95
South Carolina	June-Sept.	1,200	1,100	1,100	100
Texas	July-Sept.	4,700	4,000	3,200	80
GROUP TOTAL		42,400	43,300	41,200	95
CARROTS:					
California	July-Sept.	15,000	14,700	14,800	101
Michigan	July-Nov.	4,200	4,200	4,200	100
GROUP TOTAL		19,200	18,900	19,000	101
CAULIFLOWER: 1/					
California	July-Sept.	9,000	9,000	8,500	94
CELERY: 1/					
California	July-Sept.	5,700	5,700	5,900	104
CORN, SWEET:					
California	July-Sept.	11,200	11,400	11,500	101
Illinois	July-Sept.	5,600	5,300	6,400	121
Michigan	July-Oct.	9,500	9,500	10,000	105
New Jersey	July-Oct.	7,800	7,500	7,500	100
New York	July-Oct.	35,600	28,000	32,000	114
North Carolina	June-Aug.	8,200	7,500	7,200	96
Ohio	July-Oct.	15,200	15,300	15,000	98
Pennsylvania	July-Sept.	18,800	19,600	18,100	92
Wisconsin	July-Sept.	7,400	6,900	7,100	103
GROUP TOTAL		119,300	111,000	114,800	103
HONEYDEW:					
Arizona	June-Sept.	2,000	1,800	2,500	139
California	July-Sept.	12,100	12,000	12,300	103
GROUP TOTAL		14,100	13,800	14,800	107
LETTUCE, HEAD:					
California	July-Sept.	49,000	47,000	43,000	91
Colorado	June-Sept.	1,800	2,200	1,800	82
GROUP TOTAL		50,800	49,200	44,800	91
TOMATOES:					
California	July-Sept.	18,400	19,900	20,500	103
Michigan	July-Sept.	2,200	2,100	2,200	105
New Jersey	July-Oct.	3,100	3,000	3,000	100
New York	July-Oct.	2,300	2,400	2,400	100
Pennsylvania	July-Sept.	4,200	3,700	3,700	100
Virginia	July-Sept.	4,800	5,500	5,800	105
GROUP TOTAL		35,000	36,600	37,600	103
WATERMELON:					
California	July-Sept.	8,700	10,000	9,000	90
Georgia	June-Sept.	25,000	23,000	20,000	87
Mississippi	June-Sept.	3,000	2,700	2,900	107
South Carolina	June-Sept.	7,000	7,000	6,500	93
Texas	July-Sept.	19,000	13,000	15,700	121
GROUP TOTAL		62,700	55,700	54,100	97

1/ Includes fresh market and processing.

ONION ACREAGE AND PRODUCTION

Production of spring onions in 2005 is forecast at 10.9 million cwt., down 10 percent from last year, but 7 percent above 2003. The crop is produced on 34,600 harvested acres, averaging 314 cwt. per acre. Arizona harvest has just begun and is expected to continue until mid to late July. California's spring onion crop is two weeks behind in some areas due to below average temperatures and rainy conditions. Some mildew problems were reported due to wet conditions. Other areas reported mild temperatures and good conditions. Georgia's crop was mostly harvested by mid-June. Disease problems have been minimal and the crop has been rated in fair to mostly good condition throughout the growing season. In Texas, planting of this year's spring onion crop was delayed by heavy rainfall, but good progress has been made as conditions have improved. Blight lowered yields in some areas. Increased fuel and labor costs in the growing areas are causing concern for growers.

Production of summer non-storage onions is forecast at 10.9 million cwt., down 10 percent from last year. Harvested area covers 22,400 acres, down 3 percent from 2004. California non-storage summer onion growers noted rain delays during planting. Mildew problems were reported due to the wet conditions. Nevada growers report that planting is complete and plants were about six inches high at the end of June. Most fields are in good condition and irrigation supplies are adequate. New Mexico growers report high yields this year. Fifty percent of the crop was harvested by the third week of June with mostly excellent quality reported. Texas summer onions are doing very well this year. The crop in the Plains looks good. Fields are being irrigated and harvest is expected to begin around mid-July. The summer non-storage onion area of the State had some hail storms recently, but the effect on the crop will not be known until harvest begins.

Growers expect to harvest 102,920 acres of summer storage onions this year, down 5 percent from last year for comparable States. In California, rain delayed planting of the summer onion crop. Some acreage was not planted due to wet conditions. Lower yields are expected because of disease and mildew problems. Idaho's crop was planted on schedule with some areas complete about two weeks ahead of schedule. Growers report an average crop of good quality. Michigan growers report cool and dry conditions across most of the State, which helped crop progress. The New York storage onion crop is on schedule with no major problems reported. Oregon's growing conditions were mostly favorable this year despite wet conditions, which hindered some fieldwork in the spring. Utah had wet weather early in the season. Most growers appreciate the water given the drought conditions in past years, while some growers reported flooding in lower areas of their fields. Conditions have improved for Washington growers with additional rainfall shrinking the deficit of the central basin. Many growers are being conservative this season, either planting the same acreage as last year or lowering their acreage, due to last year's shipping problems and poor prices. Conditions in Wisconsin have been good so far this season.

The final tally of 2004 storage onion production is 57.9 million cwt., up 12 percent from 2003. Harvested acreage, at 108,550 acres, is down 3 percent from 2003. The average yield of 534 cwt. per acre is 70 cwt. above 2003. The 2004 storage crop is valued at $409 million, a decrease of 17 percent from 2003. The average price per cwt. decreased from $10.70 in 2003 to $8.35 in 2004. With spring and non-storage summer onions added in, total value of the 2004 harvested onions is $825 million, down 16 percent from 2003.

ONION ACREAGE AND PRODUCTION 1/

Season and State	Area Planted		Area Harvested		Yield Per Acre		Production	
	2004	2005	2004	2005	2004	2005	2004	2005
	Acres				Cwt.		1,000 Cwt.	
SPRING 2/								
Arizona	1,600	2,300	1,600	2,300	500	510	800	1,173
California	7,300	7,500	7,100	7,300	505	440	3,586	3,212
Georgia	16,500	13,500	14,500	11,000	260	240	3,770	2,640
Texas	14,500	15,500	12,500	14,000	310	275	3,875	3,850
SPRING TOTAL	39,900	38,800	35,700	34,600	337	314	12,031	10,875
SUMMER								
Non-Storage 2/								
California	8,800	9,000	8,400	8,600	560	450	4,704	3,870
Nevada	3,400	2,400	3,400	2,400	640	640	2,176	1,536
New Mexico	7,300	7,400	7,100	7,200	515	550	3,657	3,960
Texas	2,900	2,900	2,800	2,800	370	370	1,036	1,036
Washington 3/	1,500	1,400	1,500	1,400	350	370	525	518
NON-STORAGE TOTAL	23,900	23,100	23,200	22,400	521	488	12,098	10,920
Storage 4/								
California 5/	29,400	28,000	28,500	27,000	430	---	12,255	---
Colorado	12,500	10,000	11,000	9,500	500	---	5,500	---
Idaho	11,000	9,700	10,400	9,500	770	---	8,008	---
Michigan	3,700	3,400	3,200	3,300	290	---	928	---
Minnesota 6/ 7/								
New York	13,500	13,000	13,000	12,500	400	---	5,200	---
Ohio 8/								
Oregon- Malheur	12,500	11,000	11,100	11,000	780	---	8,658	---
- Other	7,400	7,000	7,400	7,000	570	---	4,218	---
Utah 9/	1,600		1,500		520	---	780	---
Washington	20,000	19,500	20,000	19,500	580	---	11,600	---
Wisconsin	2,000	1,800	1,900	1,700	320	---	608	---
Other States 10/	700	2,020	550	1,920	324	---	178	---
STORAGE TOTAL	114,300	105,420	108,550	102,920	534	---	57,933	---
SUMMER TOTAL	138,200	128,520	131,750	125,320	532	---	70,031	---
U.S. TOTAL -- ALL ONIONS	178,100	167,320	167,450	159,920	490	---	82,062	---

1/ Estimates for 2004 revised.
2/ Primarily fresh market.
3/ Includes Walla Walla and other non-storage onions.
4/ Yield and production for 2005 will be published October 4, 2005.
5/ Primarily dehydrated and other processing.
6/ Data for 2004 not published to avoid disclosure of individual operation.
7/ Estimate discontinued in 2005.
8/ Data for 2004 and 2005 not published to avoid disclosure of individual operations.
9/ Data for 2005 not published to avoid disclosure of individual operations.
10/ Data for: 2004 — MN and OH; 2005 — OH and UT.