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Fruit and Tree Nuts Outlook

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Bigger Citrus Crop Forecast for 2003/04

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Approved by the World Agricultural Outlook Board.

Fruit and tree nut growers received lower prices this September and October than during the same period a year ago. Prices were lower for lemons, oranges, apples, and pears, the major fruit in the market during the fall. The September Consumer Price Index (CPI) for fresh fruit was fractionally lower than August but above last September. The October CPI averaged 3 percent above last October. Retail prices were higher than last October for grapefruit, Thompson seedless grapes, and strawberries.

The 2003/04 citrus crop is forecast to be 14 percent larger than last season. Good weather during Florida's growing season increased the number of fruit and fruit size. As a result, Florida is projected to produce 21 percent more fruit this season than last.

A smaller supply of fresh oranges is expected this season due to a 5-percent decline in production in California and a slightly smaller Arizona crop. Harvesting of fresh-market navel oranges began in early November. Fruit quality and size are reported to be good. These positive attributes along with the smaller crop should help boost fresh-orange grower prices this season.

The Florida orange crop is projected to be 24 percent larger in 2003/04 than last season. Since about 95 percent of the fruit is processed into juice, orange juice production is forecast to reach 1.6 million gallons, single-strength equivalent. The larger production and high beginning juice stocks should result in a decrease in imports. A smaller orange crop in Brazil this season, the major world supplier of orange juice, is likely to boost U.S. exports.

The 2003/04 grapefruit crop is expected to be bigger than last season, but smaller than the previous two seasons. The bigger crop is likely to put downward pressure on grower prices. The lemon crop is expected to be 4 percent smaller than last season due to a smaller California crop. Tangerine production is expected to increase 16 percent over last season, the second largest on record. Clementine imports are also projected to be higher, providing ample supply of all varieties of tangerines this season.

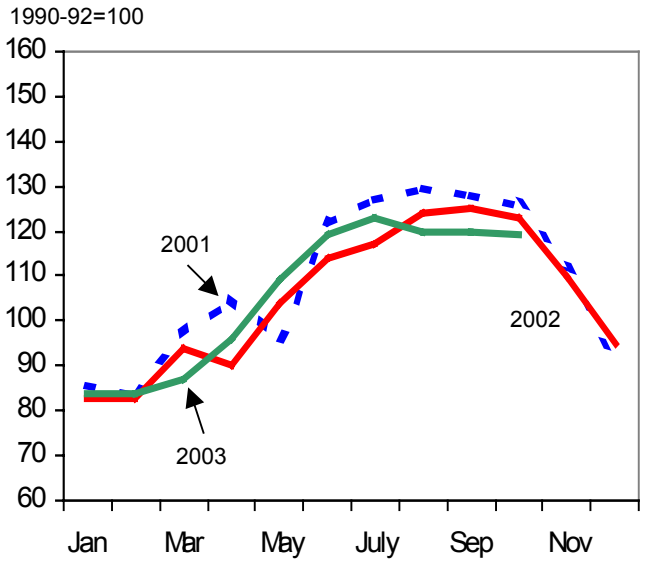
Price Outlook

Fall Fruit Prices Averaging Below Last 2 Years

The index of prices received by fruit and tree nut growers has been below the past 2 years for September and October (fig. 1). Prices were lower these 2 months than last year for lemons, oranges, apples, and pears, the major fruit in the market during the fall. The lower orange price reflects the marketing of the last of the supplies of the 2002/03 Valencia crop, with this season's navel oranges not entering the market until November.

The index declined 1 point between September and October due to lower prices for grapefruit and lemons offsetting higher prices for oranges, apples, and strawberries (table 1). Fresh grape prices remained unchanged between September and October but were higher than the same 2 months a year ago.

Figure 1
Index of prices received by growers for fruit and nuts



Source: National Agricultural Statistics Service, USDA.

Table 1--Monthly fruit prices received by growers, United States

Commodity	2002		2003		2002-03 Change	
	September	October	September	October	September	October
	---- Dollars per box -----				Percent	
Citrus fruit: 1/						
Grapefruit, all	5.23	5.17	8.07	6.30	54.3	21.9
Grapefruit, fresh	6.13	7.38	9.95	8.58	62.3	16.3
Lemons, all	18.43	15.19	8.35	5.76	-54.7	-62.1
Lemons, fresh	24.92	22.21	14.94	11.02	-40.0	-50.4
Oranges, all	5.33	5.18	2.80	3.28	-47.5	-36.7
Oranges, fresh	6.33	7.36	4.64	6.16	-26.7	-16.3
Noncitrus fruit:	---- Dollars per pound -----					
Apples, fresh 2/	0.30	0.30	0.25	0.27	-16.3	-9.3
Grapes, fresh 2/	0.32	0.30	0.34	0.34	6.3	13.6
Peaches, fresh 2/	0.28	--	0.26	--	-5.8	--
Pears, fresh 2/	0.24	0.23	0.21	0.21	-10.5	-9.0
Strawberries, fresh	0.58	0.68	0.80	0.99	36.6	44.6

1/ Equivalent on-tree price.

2/ Equivalent packinghouse-door returns for CA, NY (apples only), OR (pears only), and WA (apples, peaches, and pears). Prices as sold for other States.

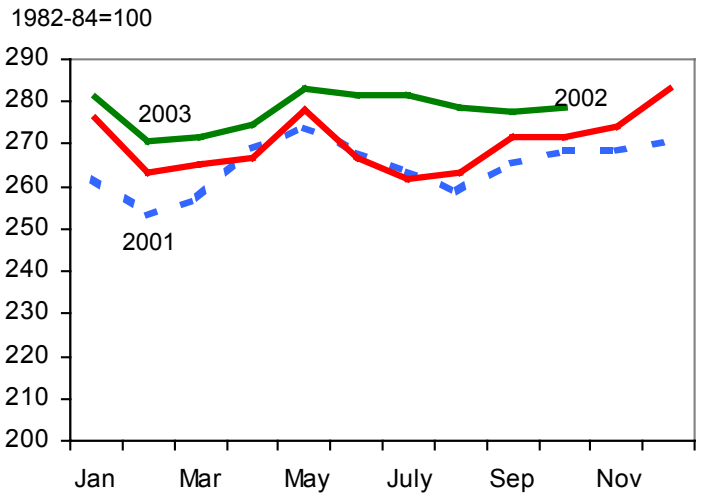
Source: National Agricultural Statistics Service, USDA.

The Consumer Price Index (CPI) for September reached 277.7 (1982-84=100), down fractionally from August but up 2 percent from September 2002 (fig. 2). This September, consumers paid higher prices at the retail level than a year ago for fresh Valencia oranges, grapefruit, Red Delicious apples, peaches, Thompson seedless grapes, and strawberries, as well as for frozen concentrated orange juice and wine (table 2). They paid less for lemons and bananas.

In October, the CPI for fresh fruit reached 278.6, fractionally higher than September and 3 percent higher than October 2002. Prices were higher at the retail level in October 2003 from the same month last year for grapefruit, Thompson seedless grapes, and strawberries. Prices declined for bananas, Red Delicious apples, lemons, and Valencia oranges.

Figure 2

Consumer Price Index for fresh fruit



Source: Bureau of Labor Statistics, U.S. Department of Labor.

Table 2--U.S. monthly retail prices, selected fruit, 2002-2003

Commodity	Unit	2002		2003		2002/2003 Change	
		September	October	September	October	September	October
Fresh:							
Valencia oranges	Lb	0.572	0.608	0.594	0.598	3.8	-1.6
Navel oranges	Lb	--	1.163	--	--	--	--
Grapefruit	Lb	0.754	0.729	0.858	0.824	13.8	13.0
Lemons	Lb	1.593	1.586	1.371	1.393	-13.9	-12.2
Red Delicious apples	Lb	1.011	1.001	1.023	0.936	1.2	-6.5
Bananas	Lb	0.498	0.504	0.494	0.490	-0.8	-2.8
Peaches	Lb	1.427	--	1.444	--	1.2	--
Anjou pears	Lb	--	--	--	--	--	--
Strawberries 1/	12-oz pint	1.873	1.884	1.986	2.246	6.0	19.2
Thompson seedless grapes	Lb	1.546	1.809	1.597	1.877	3.3	3.8
Processed:							
Orange juice, concentrate 2/	16-fl. oz	1.840	1.795	1.896	1.975	3.0	10.0
Wine	liter	6.552	6.000	6.894	6.179	5.2	3.0

-- Insufficient marketing to establish price.

1/ Dry pint.

2/ Data converted from 12 fluid ounce containers.

Source: Bureau of Labor Statistics, U.S. Department of Labor.

Citrus Fruit Outlook

Bigger Citrus Crop Expected in 2003/04

The U.S. citrus industry is expected to produce 14 percent more fruit in 2003/04 than a season ago. An 18-percent bigger orange crop is responsible for much of the increase. Increased production of grapefruit, tangerines, and Temples are also expected this season.

The bigger crops this season are due to good weather conditions in Florida during 2003. As a result of the favorable growing conditions, Florida is expected to produce 21 percent more citrus fruit this season. Since Florida accounts for 78 percent of all U.S. citrus production, the bigger crops from Florida outweigh smaller crops expected from California and Texas. Arizona, the smallest citrus grower among the four major States, also is expected to produce more citrus this season.

Fewer Fresh Oranges May Bolster Grower Prices

California and Arizona produce most of the oranges for the fresh market, accounting for about 80 percent of fresh orange sales. The orange crop out of California is expected to reach 2.2 million tons in 2003/04, 5 percent smaller than last season (table 3). Arizona's crop of 17,000 tons would be slightly smaller than last season, if realized.

The California navel crop this season is expected to total 1.5 million tons. Navel oranges are the early season orange variety and the most popular fresh variety both domestically and in international markets. In 2003/04, the navel crop is expected to account for 66 percent of the oranges produced in California and Arizona. The industry has indicated that the fruit set is lighter this season than last, resulting in larger fruit. Both the reduced quantity of fruit this season and the larger size should help boost grower prices. California fresh navel season-average prices in 2002/03 were the lowest in 3 years. With a box averaging $7.35, growers received about 40 percent less than the previous season.

This season's navel orange marketing is off to a slow start as growers waited for their fruit color to improve. Warm weather in California has delayed the coloring process, and even though the fruit was said to be mature, with the proper sugar/acid ratio, the rind color was weak and that could bring down prices. Harvesting got underway the first week of November, with improvements reported in appearance and high quality, and growers will likely be seeing good prices if they do not oversupply the market at the start.

The California/Arizona Valencia orange crop is projected at 759,000 tons, down 5 percent from a year ago. The Valencia crop is reported to be progressing

Table 3--Oranges: Utilized production, 2000/01-2002/03 and indicated 2003/04 1/

Crop and State	Utilized			Forecast 2003/04	Utilized			Forecast 2003/04
	2000/01	2001/02	2002/03	as of 10-2003	2000/01	2001/02	2002/03	as of 10-200
	--1,000 boxes 2/--				--1,000 short tons--			
Oranges:								
Early/mid season and navel 3/:								
Arizona	480	270	200	220	18	10	8	8
California	35,500	32,000	41,000	39,000	1,331	1,200	1,538	1,463
Florida	128,000	128,000	112,000	137,000	5,760	5,760	5,040	6,165
Texas	2,000	1,530	1,350	1,300	85	65	57	55
Total	165,980	161,800	154,550	177,520	7,194	7,035	6,643	7,691
Valencia:								
Arizona	420	250	270	250	16	9	10	9
California	19,000	19,500	21,000	20,000	713	731	788	750
Florida	95,300	102,000	91,000	115,000	4,288	4,590	4,095	5,175
Texas	235	210	220	250	10	9	9	11
Total	114,955	121,960	112,490	135,500	5,027	5,339	4,902	5,945
Total	280,935	283,760	267,040	313,020	12,221	12,374	11,545	13,636

1/ The crop year begins with bloom of the first year shown and ends with completion of harvest the following year.
2/ Net pounds per box: Arizona and California--75, Florida--90, and Texas--85.
3/ Navel and miscellaneous varieties in California and Arizona, and early- and mid-season (including Navel) varieties in Florida and Texas. Small quantity tangerines also included in Texas.
Source: National Agricultural Statistics Service, USDA.

normally. Growers are reducing acreage planted to Valencia oranges because of low grower returns due to weak market demand and as a result of encroaching urbanization.

Texas is projected to produce 1-percent fewer oranges than last season with about 55,000 tons of early season oranges and 11,000 tons of Valencias. Typically, about three-fourths of the crop is for fresh market. Wet weather this fall has improved sizing of the fruit but was hampering harvesting.

Orange Juice Production Projected To Increase in 2003/04

A record orange crop expected in Florida for 2003/04 should push orange juice production up to 1.6 billion gallons, single-strength equivalent (sse), 24 percent higher than the previous season (table 4).

The October estimate for Florida's orange crop, the first estimate of the season, is 11.3 million tons, 24 percent higher than last season and 3 percent higher than the last record set in 1997/98. The early-mid season varieties, including navels are projected at 6.2 million tons and the Valencia crop is expected to produce a record 5.2 million tons. Florida experienced above average rainfall this past summer and fall, resulting in large fruit size. Also, the average number of fruit per tree is 28 percent higher than last season. Juice yield is projected to be 1.55 gallons per box at 42^0 Brix. This first projection of the season is slightly higher than last season's 1.54 gallons per box. The higher yield helps boost estimated juice production along with the bigger supply of fruit.

Beginning juice stocks for the 2003/04 season are projected to be the highest to date at 702 million gallons, sse, 5 percent higher than last season but only fractionally higher than two seasons ago. As a result of the large beginning stocks and expected 24-percent bigger production, orange juice supplies are expected to reach a record 2.4 billion gallons. Juice supplies will likely be only about 11 percent bigger in 2003/04 than last season due to expected lower imports. The bigger crop this season along with a projected smaller Brazilian crop this marketing year, will result in a decline in imports, projected to be 36 percent lower than last season (table 5). Also as a result of Brazil's smaller crop and juice production, demand for U.S. orange juice should increase internationally, and exports are projected to increase about 30 percent.

With the large supply of juice expected this year, grower prices are likely to decline. Florida orange growers are facing downward pressure on prices both from the large supply of fruit as well as large supply of juice inventories. If prices fall in 2003/04, it would

Table 4--United States: Orange juice supply and utilization, 1990/91-2002/03

Season 1/	Beginning stocks	Production	Imports	Supply	Exports	Domestic consumption	Ending stocks 2/	Per capita consumption
	Million SSE gallons 3/							Gallons
1990/91	225	876	233	1,334	96	1,080	158	4.3
1991/92	158	930	203	1,291	107	1,014	170	4.0
1992/93	170	1,207	232	1,609	114	1,245	249	4.8
1993/94	249	1,133	287	1,669	107	1,202	360	4.6
1994/95	360	1,257	141	1,758	117	1,207	434	4.6
1995/96	434	1,271	261	1,966	130	1,420	417	5.3
1996/97	417	1,437	257	2,111	148	1,399	564	5.2
1997/98	564	1,555	305	2,423	148	1,596	679	5.8
1998/99	679	1,236	346	2,260	150	1,576	534	5.7
1999/00	534	1,507	339	2,380	146	1,589	645	5.7
2000/01	645	1,361	258	2,264	123	1,443	698	5.1
2001/02	698	1,402	189	2,290	129	1,495	666	5.2
2002/03 4/	666	1,256	280	2,202	99	1,401	702	4.8
2003/04 4/	702	1,559	180	2,441	129	1,582	730	5.4

1/ Season begins in December of the first year shown. As of 1998/99, season begins the first week of October.
2/ Data may not add due to rounding. Beginning with 1994/95, stock data include chilled as well as canned and frozen concentrate juice. 3/ SSE = single-strength equivalent. 4/ Estimate.
Source: Economic Research Service and Foreign Agricultural Service, USDA.

be the second consecutive year of lower prices. Another factor that could affect orange prices is the weak demand for orange juice last season. Processors are likely concerned that demand may continue weak again this season, and juice stocks could become even higher. The stock situation will be factored in when processors determine what price they will be willing to pay for fruit on the spot market.

While the orange price situation does not look very favorable, this season there are some factors that can stabilize prices. Much of the fruit that is sold to processors is under multi-year contracts with set prices, minimizing the affects of supply and demand on an annual basis.

Consumption averaged only 4.83 gallons per person in 2002/03, 7 percent less than the previous season. Demand in 2002/03 was a reversal from recent years. From the mid-1990s to the early 2000s Americans drank an average of 5.4 gallons per person per year.

The decline in juice consumption this past season is so far a single year decrease and does not represent any trend. Some in the industry are blaming the different diets, such as the Atkins diet, for the decline. There is, however, too little data to make any accurate inferences as to the cause of last season's decline.

Most of the decrease in juice movement was a response to the continued decline in demand for frozen concentrated orange juice (FCOJ). Movement of FCOJ in 2002/03 was off by 20 percent from the previous season. FCOJ still makes up the largest share of the orange juice market in the United States. About 53 percent of the fruit processed and almost all the imported juice was FCOJ. With so much of the market still FCOJ, its slowed movement dragged down the industry. Demand continued strong for not-from- concentrate orange juice (NFC) in 2002/03, increasing 3 percent from the previous season. Most of NFC is sold at retail, and retail sales of NFC were up about 5 percent from the previous season, according to ACNeilsen Scantrack data.

Bigger Grapefruit Crop Expected in 2003/04

U.S. grapefruit production is projected to total 2.2 million short tons in 2003/04, 6 percent more than last season (table 6). If realized, however, the crop would be 10 percent smaller than two seasons ago and the second lowest utilization since 1989/90, when a freeze substantially reduced crop size.

Table 5--Brazilian FCOJ production and utilization, 1991-2003

Season 1/	Beginning stocks	Production	Domestic consumption	Exports	Ending stocks 2/
	--Million SSE gallons 3/--				
1991	177	1,334	25	1,390	96
1992	96	1,610	25	1,532	148
1993	148	1,572	25	1,546	148
1994	148	1,583	31	1,482	218
1995	218	1,525	25	1,476	242
1996	242	1,620	24	1,660	177
1997	177	1,954	22	1,778	331
1998	331	1,665	26	1,586	370
1999	418	1,912	22	1,821	486
2000	486	1,683	21	1,778	370
2001	370	1,375	21	1,596	128
2002	212	1,899	21	1,681	409
2003	409	1,435	21	1,653	170

1/ Season begins in July. 2/ Data may not add due to rounding.
3/ SSE = single-strength equivalent. To convert to metric tons at 65 degrees brix, divide by 1.40588.
Source: Foreign Agricultural Service, USDA.

Florida's grapefruit production, projected to be 9 percent higher than last season, offsets smaller crops expected from California, Texas, and Arizona to drive up total production. Florida's crop will account for about 82 percent of all grapefruit production in the United States.

Favorable growing conditions in Florida in 2003 resulted in an average of 25 percent more fruit per tree for white grapefruit and 30 percent more for colored grapefruit than last season. Fruit sizes for both the white and colored grapefruit are above average although not as large as last season. The increase in fruit yields per tree and large fruit were the major factors contributing to the projection for more boxes of Florida grapefruit this season. At the same time, the number of bearing trees continues to decline as growers respond to low returns, disease, and urbanization.

California's grapefruit production is expected to decline 2 percent in 2003/04 from the previous season to 184,000 tons. The crop is reported to be of good quality. Arizona's crop size continues to diminish, with only 3,000 tons expected this season. Texas' production is expected to decline for the third straight year by 6 percent to 212,000 tons. Shipments out of Texas were down slightly in October, the beginning

of the season, with fewer grapefruit going to fresh market, but slightly more going to processing than in October 2002.

Grapefruit prices have been averaging higher so far this season. With prices available for only September and October 2003, fresh grapefruit prices have ranged from $9.27 a box, higher than the same 2 months for the past 4 years. The smaller-than-average crop size expected this season should help support grower prices and at least keep them stable with those received last season.

Low beginning juice stocks for grapefruit juice may help boost grower prices (table 7). Per capita grapefruit consumption is projected to be about 0.4 gallons for 2003/04, the same as last season. As of early November, movement was above last season for frozen concentrated grapefruit juice, but lagging slightly for not-from-concentrate juice. Processing of grapefruit juice has not really begun for the season. Processors are mostly juicing early season oranges at this time, so much of the grapefruit juice movement is from inventory.

Fewer Lemons Expected for the 2003/04 Season

The 2003/04 U.S. lemon crop is forecast to be 4 percent smaller than the previous season due to a smaller crop out of California (table 8). California's production, which accounts for 88 percent of the total, is expected to reach only 874,000 tons, 4 percent below last season. Arizona's crop is projected to remain the same as last season, at 114,000 tons.

Despite the projected smaller crop, lemon prices have been lagging behind recent years so far this season. Ranging from $19.75 per box in August to $11.02 in October, fresh lemon prices have been averaging about 37 percent lower than last season. The low prices at the beginning of the season are likely being driven by the low prices ending the 2002/03 season. Once the new crop of lemon harvest gets underway more intensively, prices are likely to pick up. Smaller-than-average sizes for this season's lemons, however, will probably put downward pressure on prices, and season-average prices for 2003/04 will likely continue below average. Fresh lemon exports declined in 2002/03 due to weakened demand by the major international market, Japan. Shipments to Japan fell 12 percent

Table 6--Grapefruit: Utilized production, 1999/2000-2001/02 and indicated 2002/03 1/

Crop and State	Utilized			Forecast for 2003/04	Utilized			Forecast for 2003/04
	2000/01	2001/02	2002/03	as of 10-2003	2000/01	2001/02	2002/03	as of 10-2003
	--1,000 boxes 2/--				--1,000 short tons--			
Florida, all	46,000	46,700	38,700	42,000	1,955	1,985	1,645	1,786
Colored	27,300	27,800	22,500	25,000	1,160	1,182	956	1,063
White	18,700	18,900	16,200	17,000	795	803	689	723
Arizona	250	160	130	90	8	5	4	3
California	6,300	5,900	5,600	5,500	211	198	188	184
Texas	7,200	5,900	5,650	5,300	288	236	226	212
Total	59,750	58,660	50,080	52,890	2,462	2,424	2,063	2,185

1/ The crop year begins with bloom of the first year shown and ends with completion of harvest the following year.

2/ Net pounds per box: California and Arizona-67, Florida-85, and Texas-80.

Source: National Agricultural Statistics Service, USDA.

during the season, offsetting increases to Canada, China, and South Korea. Unless fruit size increases this season, 2003/04 may be another year of lower exports, since markets such as Japan have a strong preference for larger fruit.

Tangerine Production Expected To Be Up 16 Percent in 2003/04

The 2003/04 tangerine crop is projected to total 431,000 tons, 16 percent higher than last season and the second highest on record after 1999/2000 (table 9). Production is projected to be higher in Florida and Arizona but unchanged from last season in California.

Florida's crop, which is expected to account for 73 percent of domestic production is likely to be composed of two-thirds early-season tangerines, mostly Fallglos and Sunburst and the remaining one-third is late-season Honey tangerines. There are fewer bearing trees in 2003/04, but yields have increased as the trees mature. Fallglo tangerines are expected to be about average, but smaller than last season, and Sunbursts and Honey are expected to be above average sized.

The 2003/04 marketing year just began for tangerines in October. Prices growers received this October were the lowest in recent years. Much of the fruit marketed at this time is the Fallglo variety, and their smaller size may have adversely affected prices. Despite the bigger crop, Florida tangerine shipments have been lagging behind the previous two seasons as of early November. Unless demand picks up as the season progresses, growers may be facing a second year of lower prices.

Clementine imports begin to enter the United States in November and therefore data are not yet available about shipments this season. Shipments are likely to be higher this season than last since there are no phytosanitary restrictions preventing imports as there were at the beginning of last season. Clementine production is reported to be higher this season in Spain, the major source for the U.S. market. Therefore, there is likely to be more available to be shipped, and imports for the 2003/04 season should be above last season.

The increase in supply of clementines increases competition in the United States for domestically produced oranges and tangerines. If imports do increase, U.S. orange and tangerine growers may experience lower prices during the time when the bigger supply of clementines are in the market.

Table 7--Grapefruit juice: Supply and utilization, 1980/81 to date

Season 1/	Supply				Utilization			
	Production	Imports	Beginning stocks 2/	Total supply	Ending stocks	Exports 3/	Consumption Total	Per capita
			-- Million gallons, single-strength equivalent --					Gallons
1995/96	171	1	76	248	69	27	152	0.56
1996/97	192	0	69	262	90	21	151	0.55
1997/98	166	0	90	256	71	18	167	0.60
1998/99	171	1	71	243	57	25	161	0.58
1999/2000	203	4	57	265	84	33	148	0.52
2000/01	183	1	84	269	77	37	155	0.54
2001/02	179	0	77	256	86	36	135	0.47
2002/03	140	0	86	226	74	39	114	0.39
2003/04 4/	156	0	74	230	74	39	117	0.39

N.A. = Not available. 1/ Marketing season begins in December of the first year shown. As of 1998/99, marketing season begins in October. 2/ Stock data was adjusted beginning with 1989/90 ending stock data to reflect Florida inventories more accurately. 3/ Exports include shipments to territories until 1986/87. 4/ Preliminary.

Source: Florida Citrus Processors Association and Economic Research Service, USDA.

Table 8--Lemons: Utilized production, 2000/01-2002/03 and forecast for 2003/04 1/

State	Utilized			Forecast for 2003/04 as of 10-2003	Utilized			Forecast for 2003/04 as of 10-2003
	2000/01	2001/02	2002/03		2000/01	2001/02	2002/03	
	--1,000 (76-lb) boxes--				--1,000 short tons--			
Arizona	3,600	2,800	3,000	3,000	137	106	114	114
California	22,600	18,300	24,000	23,000	859	695	912	874
Total	26,200	21,100	27,000	26,000	996	801	1,026	988

1/ The crop year begins with bloom of the first year shown and ends with completion of harvest the following year.
Source: National Agricultural Statistics Service, USDA.

Table 9-Other citrus: Utilized production, 2000/01-2002/03 and forecast for 2003/04 1/

Crop and State	Utilized			Forecast for 2003/04 as of 10-2003	Utilized			Forecast for 2003/04 as of 10-2003
	2000/01	2001/02	2002/03		2000/01	2001/02	2002/03	
	--1,000 boxes 2/--				--1,000 short tons--			
Tangelos:								
Florida	2,100	2,150	2,350	1,300	95	97	106	59
Tangerines:								
Arizona	650	620	430	600	24	23	16	23
California	2,200	2,200	2,500	2,500	83	83	94	94
Florida	5,600	6,600	5,500	6,600	266	314	261	314
Total	8,450	9,420	8,430	9,700	373	420	371	431
Temples:								
Florida	1,250	1,550	1,300	1,400	56	70	59	63

1/ The crop year begins with bloom of the first year shown and ends with completion of harvest the following year.
2/ Net pound per box: tangerines--California and Arizona--75; Florida--95; tangelos--90; Temples--90.
Source: National Agricultural Statistics Service, USDA.

Fruit Exports Generally Higher This Season, Tree Nuts Lower

Fruit exports have been higher for the 2002/03 season than the same period last year for most fruit and fruit products (table 10). The lemon and apple marketing season began in August and both are ahead of last season, despite smaller supplies available for export. While the total apple crop is larger in 2003 than a year ago, most of the exported apples are from Washington, which has a smaller crop. At the same time, apple stocks are very low, relative to recent years. The lemon crop is also smaller this season. Much of the harvest for the early season comes from Arizona, which reportedly has fair quality and good-sized fruit.

Tree nut exports are running behind last season. Almond exports were down from last year for August and September. Exports of shelled almonds were 12 percent lower than last season for the first 2 months. Higher exports of in-shell almonds offset the decline somewhat, but in-shell exports have accounted for less than a fifth of total almond exports so far. According to information from the California Almond Board, exports picked up in October and exceed last year. Bureau of the Census data, however, are not yet available for October to confirm this information.

Table 10--U.S. exports of selected fruit and tree nut products

Commodity	Marketing season	Season-to-date (through September) 2002	Season-to-date (through September) 2003	Year-to-date change
		--- 1,000 pounds ---		Percent
Fresh-market:				
Oranges	November-October	1,082,116	1,386,502	28.1
Grapefruit	September-August	9,996	4,899	-51.0
Lemons	August-July	13,156	16,238	23.4
Apples	August-July	128,204	135,608	5.8
Grapes	May-April	322,858	298,208	-7.6
Pears	July-June	76,985	77,443	0.6
Peaches (including nectarines)	January-December	254,684	248,865	-2.3
Strawberries	January-December	137,072	170,511	24.4
Sweet cherries	January-December	72,229	96,171	33.1
		--- 1,000 gallons ---		
Processed:				
Orange juice, frozen concentrate	October-September	125,385	41,483	-66.9
Orange juice, not from concentrate	October-September	51,885	57,364	10.6
Grapefruit juice	October-September	36,281	38,293	5.5
Apple juice and cider	August-July	772	743	-3.8
Wine	January-December	51,809	67,647	30.6
		--- 1,000 pounds ---		
Raisins	August-July	52,553	45,012	-14.3
Canned pears	August-July	1,466	995	-32.1
Canned peaches	July-June	9,237	28,312	206.5
Frozen strawberries	January-December	32,985	16,075	-51.3
		--- 1,000 pounds ---		
Tree nuts:				
Almonds (shelled basis)	August-July	107,655	99,943	-7.2
Walnuts (shelled basis)	August-July	11,498	10,505	-8.6
Pecans (shelled basis)	September-August	3,465	2,005	-42.1
Pistachios (shelled basis)	September-August	1,715	1,161	-32.3

Source: Bureau of the Census, U.S. Department of Commerce.

Apple, Tropical Fruit Imports Higher in 2003

Apple imports were higher this August and September than a year ago (table 11). Larger apple imports were coming from the Southern Hemisphere—Chile, New Zealand, and South Africa. Heavy shipments were arriving in August as stocks were becoming depleted from last season's crop and before the 2003 harvest got fully underway. By September, shipments were still ahead of last year, but they had declined dramatically.

Imports of bananas, mangoes, and other tropical fruit increased during the 2003 season from a year ago. Banana imports were running fractionally ahead of last year from January through September. Increased shipments of bananas have come in from Costa Rica and Guatemala, offsetting declines from Ecuador, Honduras, and Colombia.

Mango imports increased 1.8 percent over last year during January through September. The increased popularity of mangoes among the general population has been driving up imports. Shipments were higher from Mexico, which accounts for over three-fourths of all shipments, but lower from Peru, the next major supplier.

Imports of cashew nuts, also a tropical product, increased 6 percent between January and September 2003 over a year ago. Shipments declined from India, the major cashew supplier to the U.S. market, but increased from Brazil and Vietnam.

Table 11--U.S. imports of selected fruit and tree nut products

Commodity	Marketing season	Season-to-date (through September) 2002	Season-to-date (through September) 2003	Year-to-date change
		--- 1,000 pounds ---		Percent
Fresh-market:				
Oranges	November-October	120,493	111,169	-7.7
Tangerines (including clementines)	October-September	140,037	188,529	34.6
Lemons	August-July	30,562	25,527	-16.5
Limes	September-August	51,367	48,762	-5.1
Apples	August-July	24,954	40,430	62.0
Grapes	May-April	639,532	813,779	27.2
Pears	July-June	3,051	3,036	-0.5
Peaches (including nectarines)	January-December	102,241	123,227	-28.8
Bananas	January-December	6,505,545	6,521,838	0.3
Mangoes	January-December	491,524	500,133	1.8
		--- 1,000 gallons ---		
Processed:				
Orange juice, frozen concentrate	October-September	178,167	266,946	49.8
Apple juice and cider	August-July	52,055	58,846	13.0
Wine	January-December	102,032	116,064	13.75
		--- 1,000 pounds ---		
Canned pears	August-July	3,813	4,142	8.6
Canned peaches and nectarines	July-June	28,206	20,071	-28.8
Canned pineapple	January-December	519,174	555,853	7.1
Frozen strawberries	January-December	102,739	111,121	8.2
		--- 1,000 pounds ---		
Tree nuts:				
Brazil nuts (shelled basis)	January-December	16,508	14,639	-11.3
Cashews (shelled basis)	January-December	156,235	165,963	6.2
Pine nuts (shelled basis)	January-December	5,829	4,089	-29.9
Pecans (shelled basis)	September-August	1,076	1,423	32.2

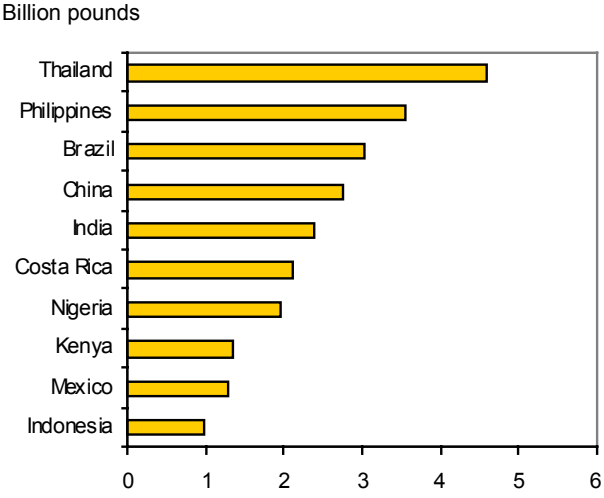
Source: Bureau of the Census, U.S. Department of Commerce.

Pineapple Production Concentrated In Tropical Regions of the World

The pineapple is believed to have originated in southern Brazil and Paraguay and was spread by the Indians to other parts of South and Central America. The Spanish and English explorers, however, were responsible for the introduction of this once rare fruit to other parts of the world. Because pineapples grow and yield best in areas with warm and relatively uniform climate year round, current production remains restricted to the tropical regions of the world.

Presently, approximately 80 countries around the world harvest a total of 32 million pounds of pineapples each year, more than double the average produced during the 1970s. Many of these producing countries have little presence in the world market as most of their production is intended for domestic consumption. Nearly three-quarters of world supplies are produced in Thailand, the Philippines, Brazil, China, India, Costa Rica, Nigeria, Kenya, Mexico, and Indonesia (fig. 3). Among these top 10 producers, Costa Rica, Indonesia, the Philippines, Thailand, and Kenya gear a significant proportion of their production towards international markets. Their combined exports of fresh, canned, and juice pineapple products comprise far more than half of world export supplies.

Figure 3
Average pineapple production in top 10 countries, 2000-2002



Source: Food and Agriculture Organization of the United Nations.

About 60 percent of the world's fresh pineapple exports come from Costa Rica, the Ivory Coast, and the Philippines. While considered a smaller producer than other leading African pineapple-producing countries such as Nigeria and Kenya, the majority of production in the Ivory Coast is exported, mostly to European Union nations. The United States is a net importer of pineapples, but even so, it is the world's fifth largest exporter of fresh pineapples, accounting for about 4 percent of world fresh volume. Meanwhile, nearly 80 percent of world canned pineapple exports come from Thailand, the Philippines, and Indonesia. Thailand and the Philippines also dominate world pineapple juice exports, accounting for more than half of total volume.

Hawaii is Home to U.S. Pineapples

Meeting the climatic requirements of the pineapple crop, virtually all commercially-produced U.S. pineapples are harvested from Hawaiian plantations. Hawaii's pineapple industry began to develop a few years following the establishment of the State's first commercial plantation in Oahu in 1885. By the turn of the century, Hawaii's pineapple industry led in world production until the 1960s. By 1975, Thailand surpassed Hawaii's production, becoming the world's largest producer to this date. With declining production since the late 1960s, the United States' average share of world output fell from 13 percent during 1970-75 to 2 percent during 2000-2002, dropping in rank as the world's 14th largest producer.

Florida had 5,000 to 10,000 acres of pineapples in commercial production at the turn of the century. However, struggles with foreign competition, particularly with Cuba, fertilizer shortages during World War I, and freezes in 1917 and 1918 have led to the demise of Florida's commercial pineapple industry.

Structure of Hawaii's Pineapple Industry Shrinking

Throughout the 1940s and the 1950s, Hawaii's pineapple industry was in an expansion path as reflected in the growing number of pineapple companies and canneries operating at that time (fig. 4). Since then, the structure of the industry has been

shrinking. Fewer and fewer farms comprise Hawaii's pineapple industry. Several pineapple companies closed down due to rising production costs, competition from Hawaii-based corporations with operations in low-cost foreign-producing countries, and a tight labor situation.

The number of farms growing pineapples in the State fell from 47 in 1970 to 15 in 1993-2002 (table 12). Moreover, total planted area devoted to the crop also declined from 61,000 acres in 1970 to 19,100 acres in 2002. The number of pineapple canneries declined from nine to three during the 1970s. In more recent years, the number of canneries declined further and currently, only one cannery remains in operation.

Three Large Companies Dominate Production

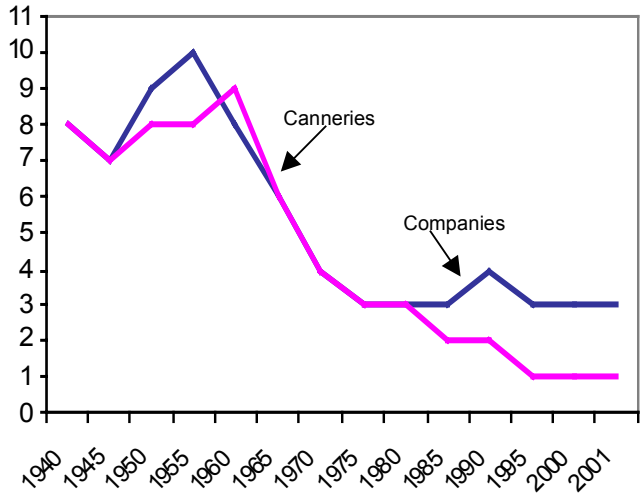
Three companies—Dole Food Hawaii, Del Monte Fresh Produce, and Maui Pineapple Company—now produce majority of the pineapples in Hawaii. Both Dole Food Hawaii and Del Monte Fresh Produce grow pineapples for the fresh market. The Maui Pineapple Company, on the other hand, is dedicated to processed production, owning the only remaining pineapple cannery facility in the United States. Other small growers sell strictly to Hawaii's fresh fruit market.

Domestic Production Continues Its Long-Run Decline, Rapid Expansion in Other Countries

Because of the shrinking structure of Hawaii's pineapple industry, production has been on a general downward trend. Based on data reported by the National Agricultural Statistics Service (NASS), Hawaii's production declined from 954,000 short tons in 1970 to 320,000 short tons in 2002, the smallest crop reported in the last 33 years. This decline mostly reflects the diminishing production used for processing, where a reported 203,000 short tons were utilized during 2002, less than half the quantity in 1990 (fig. 5).

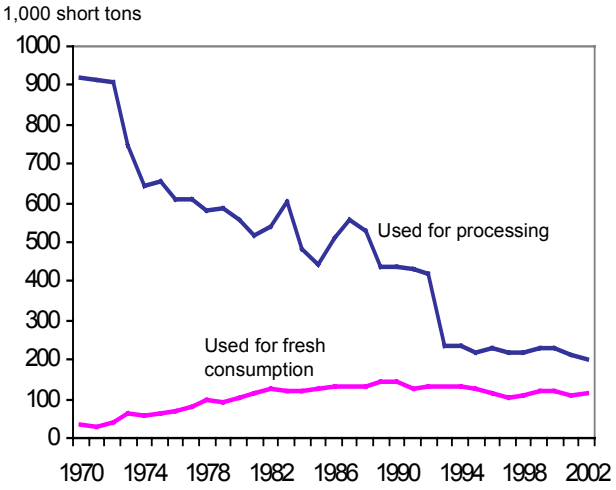
Average fresh-market production was increasing during the 1970s and 1980s. However, growing pressure from increased imports and the continued decline in the acreage devoted to the crop has resulted in generally declining fresh-market production during the last 13 years. Production for fresh use peaked in 1989 at 145,000 short tons, but has since been on a gradual decline, falling at an average annual rate of 1 percent.

Figure 4
Number of pineapple companies and canneries in Hawaii



Source: The State of Hawaii Data Book 2001, Department of Business, Economic Development, and Tourism.

Figure 5
Utilization of pineapple production in Hawaii



Source: National Agricultural Statistics Service, USDA.

Contraction in Hawaii's pineapple industry, particularly during the 1970s and 1980s, coincided with rapid production expansion in countries like Costa Rica, the Philippines, Thailand, Kenya, and Indonesia. Production grew the most in Costa Rica during the 1990s, as a result of having the largest

Table 12--Pineapples: Number of farms, acreage, production, disposition, price, and value, Hawaii, 1970 to date

Year	Farms	Acreage used for crop 1/	Utilized production 2/	Disposition		Farm price		Value of production 2/
				Processed 2/	Fresh market 3/	Processed 4/	Fresh market 5/	
	Number	1,000 acres		--1,000 short tons--		--Dollars/ton--		1,000 dollars
1970	47	61.0	954	918	36	39	100	39,500
1971	36	61.0	942	911	31	40	120	40,300
1972	36	58.0	947	906	41	43	120	43,900
1973	33	57.5	810	748	62	43	120	39,600
1974	20	55.0	700	641	59	49	150	40,259
1975	20	50.0	720	657	63	48	160	41,616
1976	17	48.0	680	611	69	63	210	52,983
1977	17	45.0	690	607	83	67	260	62,249
1978	18	43.0	675	580	95	58	310	63,090
1979	18	44.0	681	587	94	67	320	69,409
1980	18	43.0	657	556	101	76	340	76,596
1981	18	41.0	636	519	117	85	390	89,745
1982	18	36.0	670	542	128	82	390	94,364
1983	18	35.0	722	602	120	88	395	100,376
1984	18	35.0	600	481	119	88	400	89,928
1985	18	34.5	565	441	124	90	410	90,530
1986	19	36.0	646	514	132	90	405	99,720
1987	12	36.1	692	558	134	91	362	99,286
1988	12	34.6	659	526	133	99	416	107,402
1989	10	32.7	580	435	145	90	408	98,310
1990	10	30.9	575	434	141	120	385	106,365
1991	10	28.4	555	430	125	130	415	107,775
1992	21	26.2	550	420	130	110	430	102,100
1993	20	22.0	370	235	135	110	400	79,850
1994	15	22.3	365	235	130	110	408	78,890
1995	15	19.9	345	220	125	113	500	87,360
1996	15	20.0	347	232	115	117	598	95,914
1997	15	19.9	324	221	103	127	618	91,721
1998	15	21.0	332	221	111	131	575	92,776
1999	15	21.0	352	230	122	126	594	101,448
2000	15	20.7	354	232	122	130	585	101,530
2001	15	20.1	323	213	110	129	626	96,337
2002	15	19.1	320	203	117	136	624	100,616

1/ Acreage is crop acres, not harvested acreage. 2/ Fresh-weight basis. 3/ Beginning in 1983, excludes sales of fresh pineapples (without tops) included in processing utilization. 4/ Value of fresh fruit delivered to processing-plant door. 5/ Value of fresh fruit at wholesale establishments for local sales and shippers dock for mainland and foreign sales.

Source: National Agricultural Statistics Service, USDA.

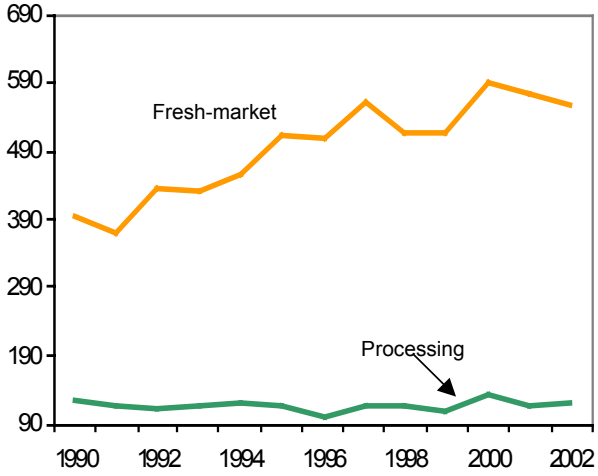
increase in harvested area and the greatest improvements in average yields. Thailand, the Philippines, and Brazil experienced smaller but significant increases in production relative to the 1970s and 1980s. In more recent years, the average annual crops in these countries increased at a slower pace than the previous decade, except in Thailand where production declined. Costa Rica still led the growth in production, producing crops more than triple the size during the 1990s, followed by Kenya (up 118 percent), and Mexico (up 69 percent).

Domestic Fresh-Market Production Increasing in Importance

A larger proportion of the Hawaiian pineapple crop is still used for processing, but there is an increasing trend toward producing for the fresh fruit market. The percentage share of utilized production intended for the fresh market has risen from 4 percent in 1970 to 37 percent in 2002, driven mainly by the higher grower returns generated in the fresh fruit market.

Over the last 13 years, declines in production have led to higher grower prices for both fresh-market pineapples and pineapples used for processing. However, grower price increases in the higher-valued fresh fruit market have been much larger, widening the price differential between the two markets. Back in the 1970s, fresh-market grower prices averaged $135 per ton higher than those for processing while in the early- to mid-1990s, the price difference averaged over $300 per ton. This price difference increased further during the most recent 5 years (1998-2002) to an average of over $460 per ton. Measured in real terms, grower prices for fresh-market pineapples were better in keeping up with inflation, increasing at an average annual rate of 3 percent during the last 13 years, whereas processing grower prices remained fairly constant (fig. 6).

Figure 6
Grower prices for Hawaiian pineapples, constant dollars
1990-92=100



Source: National Agricultural Statistics Service, USDA.

Table 13 --Free-on-board prices for processed pineapple products, West Coast, 1996-2002

	Canned Pineapple						
Month	1996	1997	1998	1999	2000	2001	2002
	Dollars per 24/20-ounce case, Hawaiian						
January	--	24.00	--	18.90	18.90	16.60	16.60
February	--	24.00	17.80	18.90	18.90	16.60	16.60
March	--	24.00	17.80	18.90	--	16.60	16.60
April	--	24.00	16.12-16.36	18.90	16.60	16.60	--
May	--	24.00	16.12-16.36	18.90	16.60	16.60	--
June	--	24.00	16.12-16.36	17.08	16.60	--	--
July	--	23.00	18.90	17.08	16.60	--	13.75
August	--	23.00-24.00	18.90	17.08	16.60	16.60	--
September	--	23.00	18.90	17.08	16.60	16.60	14.00
October	--	23.00	18.90	17.08	16.60	16.60	14.00
November	--	24.00	18.90	17.08	16.60	16.60	13.50-14.00
December	--	24.00	18.90	17.08	16.60	16.60	13.50-14.00
	Pineapple Juice						
	1996	1997	1998	1999	2000	2001	2002
	Dollars per 65 Brix gallon						
January	9.50-10.00	9.20-9.50	--	9.50-9.75	6.50-7.00	4.75-5.00	--
February	9.80-10.00	9.20-9.50	7.25-7.50	9.50-10.00	--	4.75-5.00	--
March	9.80-10.00	8.50-9.00	7.50-8.00	9.50-10.00	6.25-6.50	5.25-5.50	--
April	10.00-10.20	8.25-8.50	--	9.50-10.00	6.25-6.50	5.75-6.25	--
May	9.50-10.00	8.25-8.50	--	9.50-10.00	5.00-6.00	5.75-6.25	--
June	9.75-9.90	8.00-8.25	--	--	5.00-5.50	5.75-6.25	--
July	9.75-9.90	8.00-8.25	--	--	5.00-5.50	5.95-6.25	--
August	9.75-9.90	8.00-8.25	--	--	5.00-5.50	5.50-6.25	--
September	9.75-9.90	8.00-8.25	--	--	4.75-5.00	5.25-6.00	--
October	9.75-9.90	7.85-7.90	9.25-9.75	6.50	4.75-5.00	5.50-6.00	--
November	9.40-9.50	7.85-7.95	9.50-9.75	6.50	5.25-5.50	--	--
December	9.40-9.50	7.85-7.95	9.50-9.75	6.50-7.00	6.00-6.50	--	--

-- = Not available.

Source: Food Institute Report, January 1998-2003.

Declining prices for processed pineapple products (canned and juice) have limited the price increases growers receive for pineapples used for processing. For as much as a consistent price series would allow, monthly f.o.b. prices for 24/20-ounce Hawaiian canned pineapples in the West Coast have weakened over the period 1997-2002 (table 13). The latest available pineapple juice prices also show a similar trend, with 2001 monthly f.o.b. prices down significantly from prices reported in 1996.

Pineapples Rank 5th in U.S. Per Capita Fruit Consumption

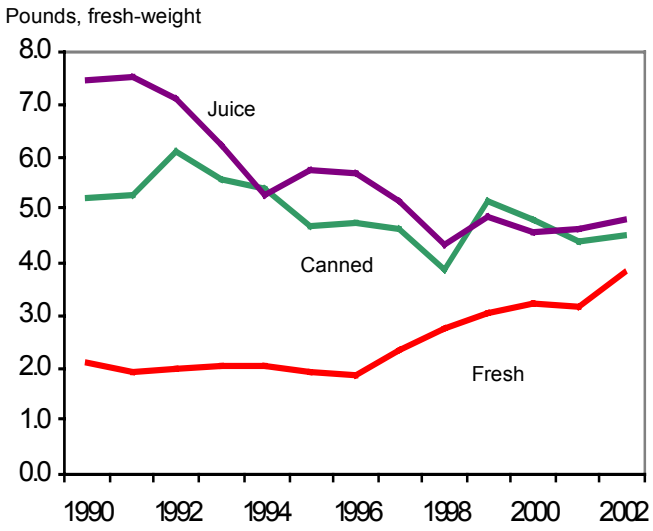
The pineapple is the 5th most consumed fruit in the United States, next to oranges, grapes, apples, and bananas. On a per capita fresh-weight equivalent basis, U.S. pineapple consumption (combined fresh and processed) averaged 12.4 pounds annually over the last 5 years, about 4 percent of total U.S. per capita fruit consumption. With the aid of imports, pineapples out ranks per capita consumption of other popular domestic fruit such as peaches, pears, and strawberries.

More Processed Pineapples Consumed On A Per Capita Basis

Americans continue to consume more processed pineapples than fresh, mostly due to the fact that more processed supplies (mostly canned and juice products) are available at the retail market. During 2002, U.S. consumption for processed pineapples amounted to 9.3 pounds per person, fresh-weight equivalent, compared with fresh-market consumption of 3.9 pounds per person. However, since the 1990s, there has been a decreasing trend in per capita consumption of processed pineapples while fresh use continued to grow, narrowing the disparity between the two, particularly in recent years (fig. 7).

While pineapples are not new to American consumers, most of what has been consumed in the past were in the form of canned fruit or juice. Hence, still many of today's consumers are not as familiar with handling pineapples in its fresh form. The increasing demand for fresh pineapples over the years may be attributed to consumer education, to better quality control, and to improved packing techniques and product movement.

Figure 7
U.S. pineapple per capita consumption



Source: Economic Research Service, USDA.

More rapid increases in fresh per capita use in recent years may be influenced by new product innovations that cater to changing tastes and preferences of today's consumers and promotional activities that aid in increasing consumer familiarity with the fresh-market product. New product introductions include new sweet varieties such as the Extra Sweet Gold pineapple that Del Monte Fresh Produce, Inc. launched in the mid-1990s, and fresh-cut products that offer convenience to final consumers. Another important factor that has likely contributed to increased per capita consumption of fresh pineapples in recent years is the growing immigrant population in the United States, specifically those from Latin American and Southeast Asian countries where pineapples are widely consumed as a fresh product.

Year-to-year changes in per capita fresh pineapple consumption grew at an average annual rate of nearly 9 percent since 1995, compared with an average annual growth rate of 4 percent during 1985-1992. On average, U.S. per capita fresh pineapple consumption increased at a faster rate than fresh consumption of any citrus and noncitrus fruit, with the exception of papayas and mangos, during 1995-2002.

Imports Constitute the Bulk of Domestic Consumption

In the face of declining domestic production, imports have played a growing role in meeting U.S. demand for pineapples. U.S. pineapple imports (all products)

as a share of domestic pineapple consumption rose from 38 percent during the 1970s to 82 percent since the mid-1990s. Canned and juice imports each account for approximately 40 percent of total import volume. The remaining 20 percent represent imports of fresh pineapples. While both canned and juice imports represent a larger share of domestic consumption, the gain in share of fresh imports has been stronger in recent years.

In the early 1980s, Mexico was the major supplier of U.S. fresh pineapple imports. However, since the 1983 Caribbean Basin Initiative established duty-free status, imports from Central America have increased. Throughout the 1990s and in more recent years, imports from Mexico have been dwarfed by imports from Costa Rica and Honduras. Costa Rican shipments of fresh pineapples to the U.S. market increased 473 percent during the period 1993-2002, reaching 765.1 million pounds. With rapid production growth, particularly of the now popular sweet variety, Costa Rica has strengthened its role in the U.S. fresh pineapple market, supplying about 85 percent of total fresh import volume during 2002, up from 57 percent in 1993.

A major portion of the remaining share of fresh imports is sourced from Honduras, Ecuador, and Mexico. Declining production, particularly in the last 5 years, has reduced the competitive position of Honduras in the U.S. fresh pineapple market. Its share of total fresh imports fell by more than half to 5 percent in the 5-year period 1998-2002, not far from the shares held by Ecuador and Mexico.

The Philippines, Thailand, and Indonesia continue to be the major suppliers of both juice and canned pineapple to the U.S. market. These countries contributed 92 percent of juice imports and 89 percent of canned imports in 2002. The Philippines alone accounted for 42 percent of canned pineapple imports and 51 percent of pineapple juice imports in 2002. Although still far behind in terms of volume shipped to the United States relative to the top three suppliers, the quantity of canned pineapples imported from China and the Republic of South Africa has grown significantly in the last 5 years. China's share of U.S. canned imports has risen from less than 1 percent early into the 1990s to around 4 percent over the last 5 years. Similarly, the Republic of South Africa's share rose from less than 1 percent to 3 percent.

Exports Continue To Decline

As with production, U.S. pineapple exports have been on a downward trend since the 1970s. U.S. shipments to international destinations have declined from an annual average of 133.4 million pounds, fresh-weight equivalent, during the 1970s to an average of 56.5 million pounds during 2000-2002. Presently, fresh exports make up more than half of U.S. pineapple shipments to international markets. During the 1970s, however, only 7 percent of total exports were fresh. Canned exports dominated U.S. pineapple exports during the 1970s, accounting for over 60 percent of total export volume. Now, it makes up for the smallest proportion of all pineapple exports, at about 15 percent. Meanwhile, juice exports account for about one-third of total export volume.

Canada is by far the largest export market for U.S. pineapples, accounting for more than half of total export volume, all products on a fresh-weight equivalent. Fresh pineapples comprise the bulk of U.S. shipments to this major export market. Canada is the destination for over 90 percent of U.S. fresh pineapple exports, more than one-third of canned exports, and less than 10 percent of juice exports in the most recent 3 years. Other leading markets are Japan, South Korea, and Mexico. Shipments to Japan come in the form of fresh and juice and those to South Korea are only juice.

Contacts and Links

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