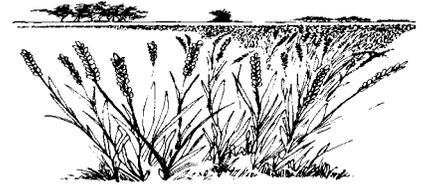


California Field Crop Review



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U.S. WHEAT AND SOYBEAN PRODUCTION

All wheat production is placed at 68.8 million tons, down 1 percent from the July forecast, but up 42 percent from 2002. Based on August 1 conditions, the U.S. yield is forecast at 1.31 tons per acre. Soybean production is forecast at 2.86 billion bushels, up 5 percent from 2002, but down 1 percent from 2001. Based on August 1 conditions, yields are expected to average 39.4 bushels per acre, up 1.6 bushels from 2002. Yields are higher than 2002 across much of the United States. However, the average yields in Iowa, Minnesota, and Oklahoma are expected to be lower, while yields are expected to be the same in Illinois, Louisiana, Mississippi, Missouri, and North Dakota. Area for harvest, at 72.6 million acres, is down 55.0 thousand acres from June, but up 1 percent from the 2002 acreage.

CALIFORNIA CROP PRODUCTION

Production of winter wheat, Durum wheat, and hay other than alfalfa increased from the previous year's level. The yield per acre increased from last year for dry beans, all hay, and hay other than alfalfa.

FIELD CROP ACREAGE, YIELD, AND PRODUCTION

Crop	Area Harvested		Unit	Yield Per Acre		Unit	Production	
	2002	2003 Forecast		2002	2003 Forecast		2002	2003 Forecast
	1,000 Acres			Number			Thousands	
CALIFORNIA								
Wheat, Winter ^{1/}	300.0	400.0	Tons	2.25	1.95	Tons	675.0	780.0
Wheat, Durum ^{1/}	90.0	115.0	Tons	3.00	2.85	Tons	270.0	327.8
Oats	27.0	30.0	Tons	1.28	1.12	Tons	34.6	33.6
Barley	75.0	58.0	Tons	1.63	1.63	Tons	122.4	94.7
Corn for Grain	150.0	110.0	Tons	4.76	4.76	Tons	714.0	523.6
Rice, All	528.0	467.0	Cwt.	81.40	80.00	Cwt.	42,989.0	37,360.0
Long	7.0	8.0	Cwt.	64.00	^{2/}	Cwt.	448.0	^{2/}
Medium	495.0	437.0	Cwt.	83.00	^{2/}	Cwt.	41,085.0	^{2/}
Short	26.0	22.0	Cwt.	56.00	^{2/}	Cwt.	1,456.0	^{2/}
Cotton, Upland ^{3/}	477.0	545.0	Lbs.	1,469.00	1,277.00	Bales	1,460.0	1,450.0
Cotton, American Pima	209.0	149.0	Lbs.	1,386.00	1,256.00	Bales	603.3	390.0
Sugar Beets ^{4/}	49.9	50.0	Tons	39.50	38.00	Tons	1,971.0	1,900.0
Beans, All Dry ^{5/}	89.0	74.0	Cwt.	19.80	21.00	Cwt.	1,762.0	1,554.0
Hay, All	1,640.0	1,560.0	Tons	5.85	5.86	Tons	9,594.0	9,134.0
Alfalfa Hay	1,140.0	1,090.0	Tons	7.10	7.00	Tons	8,094.0	7,630.0
Other Hay	500.0	470.0	Tons	3.00	3.20	Tons	1,500.0	1,504.0
UNITED STATES								
Wheat, Winter	29,651.0	36,491.0	Tons	1.16	1.41	Tons	34,284.1	51,364.5
Wheat, Durum	2,703.0	2,738.0	Tons	0.88	0.96	Tons	2,383.5	2,620.7
Oats	2,098.0	2,331.0	Tons	0.91	1.04	Tons	1,906.1	2,421.5
Barley	4,135.0	4,889.0	Tons	1.32	1.38	Tons	5,445.0	6,755.4
Corn for Grain	69,313.0	71,915.0	Tons	3.64	3.92	Tons	252,214.5	281,804.7
Rice, All	3,207.0	2,967.0	Cwt.	65.78	65.77	Cwt.	210,960.0	195,130.0
Long ^{6/}	2,512.0	2,313.0	Cwt.	62.60	^{2/}	Cwt.	157,243.0	144,728.0
Medium ^{6/}	668.0	631.0	Cwt.	78.10	^{2/}	Cwt.	52,201.0	48,874.0
Short ^{6/}	27.0	23.0	Cwt.	56.10	^{2/}	Cwt.	1,516.0	1,528.0
Cotton, Upland ^{3/}	12,184.0	12,124.0	Lbs.	651.00	659.00	Bales	16,530.3	16,653.0
Cotton, American Pima	242.6	178.4	Lbs.	1,342.00	1,212.00	Bales	678.3	450.5
Sugar Beets	1,361.1	1,342.1	Tons	20.40	22.70	Tons	27,718.0	30,509.0
Beans, All Dry ^{5/}	1,726.9	1,417.8	Cwt.	17.36	17.17	Cwt.	29,974.0	24,344.0
Hay, All	64,497.0	64,379.0	Tons	2.34	2.49	Tons	150,962.0	160,018.0
Alfalfa Hay	23,135.0	23,541.0	Tons	3.19	3.31	Tons	73,824.0	77,952.0
Other Hay	41,362.0	40,838.0	Tons	1.86	2.01	Tons	77,138.0	82,066.0

^{1/} California estimate for current year carried forward from earlier forecast.

^{2/} To be released January 2004.

^{3/} Cotton yield in pounds; production in 480-pound net weight bales.

^{4/} Relates to year of intended harvest in all states, except California. In California, related to year of intended harvest for fall planted beets in central California and to year of planting for over-wintered beets in central and southern California.

^{5/} Excludes beans grown for garden seed.

^{6/} Rice class production forecasts for 2003 are based on five-year average of class percentages.

FIELD CROP PRODUCTION

Corn - California's 2003 corn for grain production forecast is 524 thousand tons, down 27 percent from 2002. The forecast yield, at 4.76 tons per acre, remained the same as the previous year.

U.S. corn production is forecast at 282 million tons, up 12 percent from last year and 2 percent above 2001. Based on conditions as of August 1, yields are expected to average 3.92 tons per acre, up 0.28 tons from last year. If realized, both production and yield would be the largest on record. Farmers expect to harvest 71.9 million acres of corn for grain, down 70.0 thousand acres from June, but up 4 percent from 2002.

Cotton - Upland cotton production in California is forecast at 1.45 million bales, down 1 percent from last year. Harvested acreage is expected to total 545 thousand acres, 14 percent above last year. The yield is forecast at 1,277 pounds per acre, 13 percent below 2002. American Pima cotton production is forecast to be 390 thousand bales, down 35 percent from 2002. The 149 thousand acres for harvest are 29 percent below last year.

U.S. production of all cotton is forecast at 17.1 million 480-pound bales, down 1 percent from last year's 17.2 million bales. The yield is expected to average 667 pounds per harvested acre, up 2 pounds from 2002. Upland cotton production is forecast at 16.7 million 480-pound bales, 1 percent above 2002. American Pima production is forecast at 451 thousand bales, down 34 percent from last year's output. Producers expect to harvest 12.3 million acres of all cotton, 1 percent below last year. Upland cotton harvested area, at 12.1 million acres, is 60.0 thousand acres less than a year ago. American Pima harvested acreage is expected to total 178 thousand acres, 26 percent less than 2002.

Hay - Production of alfalfa hay in California is forecast at 7.63 million tons, down 6 percent from last year's crop. Other hay production is forecast at 1.50 million tons, slightly above the 2002 crop.

The U.S. alfalfa hay production is forecast at 78.0 million tons, up 6 percent from last year. Yields are expected to average 3.31 tons per acre. Harvested area is 23.5 million acres, unchanged from the June estimate, but up 2 percent from 2002. Other hay production is forecast at 82.1 million tons, up 6 percent from 2002. Based on August 1 conditions, yields are expected to average 2.01 tons, up 8 percent from last year, and if realized would be at a record high. Harvested acreage is estimated at 40.8 million, unchanged from the June estimate, but down 1 percent from 2002.

Rice - California's 2003 rice crop forecast, at 37.4 million cwt., is 13 percent below last year. The 467 thousand acres for harvest are 12 percent below last year. The yield is forecast at 8,000 pounds per acre, down 2 percent from last year.

U.S. rice production is forecast at 195 million cwt., down 8 percent from last year and 9 percent below 2001. Area for harvest is expected to total 2.97 million acres, down 7 percent from last year. Yields are forecast at 6,577 pounds per acre, down 1 pound from 2002.

Sugar Beets - California sugar beet production is forecast to be 1.90 million tons, down 4 percent from 2002. The forecast for harvested acreage increased slightly at 50.0 thousand acres. The yield is forecast at 38.0 thousand tons per acre, 4 percent below last year.

Production for the U.S. is forecast at 30.5 million tons. If realized, this would be 10 percent above last year's production. Growers in the 12 sugar beet-producing states expect to harvest 1.34 million acres, up slightly from the June estimate, but 1 percent below last year. The yield is forecast at 22.7 tons per acre, 2.3 tons above 2002 and, if realized, would be the second highest yield on record.

DRY BEAN PRODUCTION AND ACREAGE

California's 2003 all dry bean production is forecast to be 1.55 million cwt., 12 percent below the 2002 crop. The 74.0 thousand acres for harvest are 17 percent below last year. The forecast yield of 2,100 pounds per acre is up 6 percent from 2002. Large lima planted acreage is estimated to be 19.6 thousand, up 3 percent from last year. The baby lima acreage is expected to total 14.5 thousand acres, 33 percent below last year.

U.S. all dry bean production is forecast at 24.3 million cwt. for 2003, down 19 percent from last year, but 24 percent above two years ago. Harvested acreage is forecast at 1.42 million acres, down 18 percent from last year, but 14 percent above 2001. The average U.S. yield is forecast at 1,717 pounds per acre, a loss of 19 pounds from last year, but 148 pounds more than two years ago.

DRY BEAN PLANTED ACREAGE ^{1/}

Variety	CALIFORNIA		UNITED STATES	
	2002	2003	2002	2003
	1,000 Acres			
Large Lima	19.0	19.6	19.0	19.6
Baby Lima	21.5	14.5	21.5	14.5
Black-eye	12.6	16.5	34.6	36.5
Light Red Kidney	6.0	5.0	70.3	74.4
Dark Red Kidney	2.5	0.9	70.5	62.6
Pink ^{2/}	---	0.9	34.8	34.5
Garbanzo	18.5	9.7	82.1	52.0
Small White ^{3/}	---	---	3.3	3.0
Navy ^{3/}	---	---	345.3	190.7
Great Northern ^{3/}	---	---	93.8	108.1
Cranberry	1.7	1.5	24.2	17.0
Small Red ^{3/}	---	---	30.9	34.5
Black ^{2/}	---	0.4	196.8	94.0
Pinto ^{3/}	---	---	813.3	700.8
Other	10.2	7.0	81.7	59.0
TOTAL	92.0	76.0	1,922.1	1,501.2

^{1/} Production by variety will be released December 11, 2003.

^{2/} California acreage included in "Other" for 2002.

^{3/} Included in "Other" for California.

PRICES RECEIVED BY CALIFORNIA FARMERS-JULY 2003

Prices received by California farmers at mid-July were above June for all potatoes and spring potatoes. Prices remained the same as the previous month for barley and hay other than alfalfa. Dry edible beans, fall potatoes, all hay, and alfalfa hay were below the previous month's level. Mid-July prices for wheat and Upland cotton lint were not published to avoid disclosure of individual buyers. Prices were above a year earlier for dry edible beans, summer potatoes, and hay other than alfalfa. All potatoes, spring potatoes, all hay, and alfalfa hay were below July 2002's level.

U.S. PRICES RECEIVED INDEX DOWN THREE POINTS

The preliminary All Farm Products Index of Prices Received by Farmers in July is 104, based on 1990-92=100, down three points (2.8 percent) from the June Index. Since last month, all commodity group indexes are unchanged or lower, except cotton, fruit and nuts, and dairy. Lower prices for lettuce, corn, hogs, and wheat more than offset higher prices for dairy, cantaloupe, asparagus, and broccoli. The seasonal changes in the mix of commodities farmers sell, based on the past 3-year average, also affect the overall index. Decreased average marketings of dairy, cantaloupe, asparagus, and strawberries offset increased marketings of wheat, grapes, hay, and peaches.

This preliminary All Farm Products Index is up five points (5.1 percent) from July 2002. Higher prices for cattle, broilers, eggs, and soybeans more than offset lower prices for wheat, sweet corn, potatoes, and turkeys.

The July All Crops Index is 108, down 7.7 percent from June and 0.9 percent below July 2002. Price decreases for commercial vegetables, feed grains and hay, oil-bearing crops, food grains, and potatoes and dry beans more than offset price increases for cotton and fruit and nuts.

The July Food Grains Index, at 97, is down 4 percent from the previous month and 7.6 percent below July 2002. The July all wheat price, at \$97.67 per ton, is down \$4.66 from June and \$9.33 below July 2002.

The July Feed Grains & Hay Index is 100, down 8.3 percent from last month and 2.9 percent below July 2002. The corn price, at \$74.64 per ton, is down \$8.93 from June and \$1.43 below the July 2002 price. The all hay price, at \$89.00 per ton, is down \$5.60 from last month and \$4.60 below July 2002.

The July Potatoes & Dry Beans Index, at 105, is 1.9 percent below last month and 38 percent less than July 2002. The all potato price, at \$6.30 per cwt., is down 17 cents from the previous month and \$4.10 below last July. The dry edible bean price, at \$17.50 per cwt., is \$2.10 above last month, but \$7.00 below July 2002.

The July Cotton Index, at 77, is up 2.7 percent from June and 33 percent above July 2002. The July price, at 46.9 cents per pound, is up 1.6 cents from the previous month and 11.6 cents above last July.

AVERAGE FARM PRICES RECEIVED BY FARMERS 1/

Commodity	Unit	CALIFORNIA			UNITED STATES		
		July 2002	June 2003	July 15, 2003	July 2002	June 2003	July 15, 2003
		Dollars					
Corn 2/	Tons	---	---	---	76.07	83.57	74.64
Wheat 2/	Tons	3/	3/	3/	107.00	102.33	97.67
Oats 2/	Tons	---	---	---	105.63	115.00	107.50
Barley 2/	Tons	3/	116.67	116.67	89.17	125.42	108.33
Sorghum Grain 2/	Cwt.	---	---	---	4.06	3.61	3.55
Rice 2/	Cwt.	---	---	---	3.81	5.04	4.90
Dry Edible Beans 2/	Cwt.	32.40	35.70	34.00	24.50	15.40	17.50
All Potatoes 4/	Cwt.	18.60	12.30	12.60	10.40	6.47	6.30
Winter	Cwt.	---	---	---	---	---	---
Spring	Cwt.	19.00	12.70	12.80	---	---	---
Summer	Cwt.	16.80	---	18.70	---	---	---
Fall	Cwt.	---	6.80	6.60	---	---	---
All Hay, Baled 2/	Ton	92.00	88.00	86.00	93.60	94.60	89.00
Alfalfa Hay, Baled 2/	Ton	95.00	90.00	87.00	102.00	98.90	92.70
Other Hay, Baled 2/	Ton	77.00	81.00	81.00	72.20	79.20	77.80
Upland Cotton Lint 2/	Lb.	3/	3/	3/	0.353	0.453	0.469
Cottonseed	Ton	---	---	---	---	---	---

1/ The estimated prices shown in the table represent composite average prices received by farmers. They are averages for all grades, classes, and methods of sale of each commodity for the State and U.S. as a whole.

2/ Previous month revised to monthly average.

3/ Price not published to avoid disclosure of individual buyers.

4/ Monthly average.

U.S. INDEX NUMBER OF PRICES RECEIVED AND PAID BY FARMERS

Index	1910-14 = 100			1990-92 = 100		
	July 2002	June 2003	July 2003	July 2002	June 2003	July 2003
Prices Received						
All Farm Products	626	683 1/	659	99	107 1/	104
All Crops	537	578 1/	533	109	117 1/	108
Food Grains	333	321	308	105	101	97
Feed Grains and Hay	367	390 1/	357	103	109	100
Cotton	298	383 1/	396	58	75 1/	77
Potatoes and Dry Edible Beans	856	539 1/	533	169	107 1/	105
Prices Paid by Farmers for Commodities,						
Services, Interest, Taxes and Wage Rates 2/	1,640 1/	1,698 1/	1,697	123	128 1/	127
Parity Ratio 3/	38	40	39	80	84 1/	82

1/ Revised.

2/ All production indexes as of 15th of month.

3/ Ratio of Index of Prices Received by Farmers to Index of Prices Paid, Interest, Taxes and Farm Wage Rates.