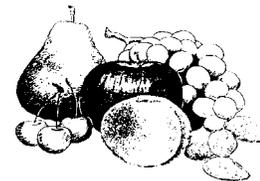


California Fruit & Nut Review



Frequency: Monthly, Except November
Released: April 14, 2004

(USPS 598-290)
VOL. 24 NO. 4



CALIFORNIA AGRICULTURAL
STATISTICS SERVICE

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MARCH CROP COMMENTS

Treatments to control diseases and insect pests continued in many tree fruit orchards, along with irrigation, cultivation, and herbicide treatments. Weather conditions during March were excellent for pollination as California experienced many days of record-high temperatures. By mid-month, late stone fruit orchards were still in bloom, but most were well into the petal fall stage and leafing out. By month's end, the bloom period had ended in most stone fruit orchards. Early nectarine and peach varieties were beginning to show fruit; fruit set appeared to be generally good. Apple, cherry and pear orchards in the Central Valley were blooming by the end of March. Late pruning of cherry trees continued in the San Joaquin Valley. Rainfall during the last week of March slowed orchard work in some parts of the Sacramento Valley. Strawberries were blooming, with berries beginning to form in many fields by month's end.

Some strawberry stands opened in Kern County. Prune orchards were treated for weeds. Swelling buds and newly opened green shoots appeared in many grape vineyards as vines responded to the warm, sunny weather. Cane training was ongoing in a few grape vineyards, but pruning and tying were essentially completed for the season. Most almond orchards were fully leafed and developing well by month's end. Walnut and pistachio orchards were breaking dormancy. Walnut trees were pruned and treated for blight. Buds began to appear in pistachio trees. Irrigation, pruning, soil amendment, and foliar nutrient applications were underway in some harvested citrus orchards. Navel orange harvesting was ongoing throughout the month, though quality continued to deteriorate due to the warm weather. Early variety Valencia oranges were harvested in some areas of the Central Valley. Rio Red grapefruit were harvested in the desert areas, while the Pummelo harvest neared completion in the Central Valley. Tangelos were picked and packed. Lemon harvest continued in the south coastal region throughout March and was virtually complete in the Central Valley.

FRUIT AND NUT STATISTICS AT A GLANCE

Crop	Bearing Acreage		Yield Per Acre		Estimated Production		Production Percent Change	Next Crop Update
	2002	2003	2002	2003	2002	2003		
NUT CROPS	Acres		Pounds		1,000 Pounds			
Almonds (Shelled) 1/	530,000	530,000	2,060	1,920	1,090,000	1,020,000	-6	May 10, 2004
Pecans	2,600	2,600	1,460	1,380	3,800	3,600	-3	October 12, 2004
Pistachio (In-Shell)								
Marketable In-Shell	---	---	---	---	242,000	88,000		
Shelling Stock	---	---	---	---	61,000	28,000		
Total	83,000	88,000	3,650	1,320	303,000	116,000	-62	January 2005
Walnuts (In-Shell) 2/	200,000	205,000	1.41	1.59	282.0	325.0	15	September 2, 2004
FRUIT CROPS								
Apples	26,000	26,000	9.04	8.85	235.0	230.0	-2	August 12, 2004
Apricots	17,000	16,500	5.00	5.61	85.0	92.5	9	June 11, 2004
Cherries	26,000	27,000	2.13	2.30	55.5	62.0	12	June 11, 2004
Grapes, Raisin 3/	246,000	255,000	11.40	8.24	2,804.0	2,100.0	-25	July 12, 2004
Grapes, Table	88,000	89,000	8.44	7.75	743.0	690.0	-7	July 12, 2004
Grapes, Wine	486,000	479,000	6.48	6.05	3,149.0	2,900.0	-8	July 12, 2004
Grapes, All 3/	820,000	823,000	8.17	6.91	6,696.0	5,690.0	-15	July 12, 2004
Olives	36,000	36,000	2.86	3.28	103.0	118.0	15	August 12, 2004
Peaches, Clingstone	31,000	31,000	18.10	17.30	562.0	536.0	-5	May 12, 2004
Peaches, Freestone	39,000	39,000	10.20	10.20	398.0	399.0	N/C	May 12, 2004
Pears, Bartlett	13,500	12,500	17.20	16.10	232.0	201.0	-13	June 11, 2004
Pears, Other	4,300	4,300	6.98	6.98	30.0	30.0	N/C	August 12, 2004
Plums, Dried 4/	74,000	72,000	2.32	2.44	172.0	176.0	2	June 4, 2004
BERRIES	2003	2004	2003	2004	2003	2004		
	Acres		Cwt.		1,000 Cwt.			
Strawberries	29,600	33,200	620	570	18,352	18,924	3	July 9, 2004
CITRUS CROPS 5/	2002-03	2003-04	2002-03	2003-04	2002-03	2003-04		
	Acres		Cartons		1,000 Cartons			
Grapefruit	13,000	12,500	862	864	11,200	10,800	-4	July 12, 2004
Lemons	49,000	49,000	980	939	48,000	46,000	-4	July 12, 2004
Oranges, Navel	127,500	128,000	643	609	82,000	78,000	-5	July 12, 2004
Oranges, Valencia	64,000	52,000	641	577	41,000	30,000	-27	July 12, 2004
Tangerines 6/	9,200	9,500	543	505	5,000	4,800	-4	July 12, 2004

1/ Almond Subjective Forecast Report released May 11 at 12:00 PM. Almond Objective Measurement Report released June 30 at 12:00 PM.

2/ Walnut Objective Measurement Report released September 2 at 12:00 PM.

3/ The Raisin Industry Diversion Program (RID) had 27,000 acres in 2002, but zero acreage in 2003. RID is deducted from bearing acreage.

4/ Dried Plum Forecast Report released June 4 at 12:00 PM.

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

6/ Includes tangelos, tangerines and tangors.

Navel Oranges - The 2003-04 Navel orange forecast is 78.0 million cartons, unchanged from the January 2004 forecast, but down 5 percent from last season. Recently, heavy demand prompted some shippers to pick under wet conditions, leading to some problems with rind breakdown and staining. Overall, however, the weather has been fairly mild, which helped maintain a generally good crop condition.

Valencia Oranges - The 2003-04 Valencia orange forecast is 30.0 million cartons, down from the January 2004 forecast of 38.0 million cartons, and down 27 percent from last season. Harvesting of the Valencia crop was well underway, with currently no major problems reported. Acreage pullouts, however, continued in both the Central Valley and southern areas. Overall quality of the harvested crop was good in both districts.

Grapefruit - The 2003-04 grapefruit forecast is 10.8 million cartons, up 4 percent from the January 2004 forecast, but down 4 percent from last season. The Rio Red variety grapefruit harvest continued in the desert area. Exterior color was fair, while the shape was normal with occasional sheep nose fruit. Texture was smooth in all sizes. Interior quality was good with nice red color. Flavor and eating quality were excellent. The Pummelo variety harvest was completed in the Central Valley by April 1.

Lemons - The 2003-04 lemon forecast is 46.0 million cartons, unchanged from the January 2004 forecast, but down 4 percent from last season. Good quality and higher demand in both the domestic and export markets were reflected in an upward trend in prices over the past few weeks. The harvest season was essentially complete in the Desert region and was winding down in the Central Valley. Harvest was progressing well in the South Coastal Area with excellent quality reported.

Tangerines - The 2003-04 tangerine forecast is 4.80 million cartons, down 4 percent from both the January 2004 forecast and last season's estimate. The season was progressing well with no major problems to date. The desert crop was winding down. Overall quality of fruit was reported to be very good to excellent. Color was excellent, shape was normal, and eating quality and flavor were very good.

CITRUS FRUITS PRODUCTION BY STATE AND U.S.

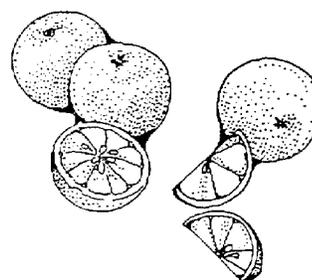
Crop and State	2001-02	2002-03	2003-04 Forecast
	1,000 Cartons		
ORANGES: 1/			
California, All	103,000	123,000	108,000
Navel and Misc.	64,000	82,000	78,000
Valencia	39,000	41,000	30,000
Florida	460,000	406,000	490,000
Texas	3,480	3,140	3,360
Arizona	1,040	940	1,080
ALL U.S. ORANGES	567,520	533,080	602,440
GRAPEFRUIT: 2/			
California, All	11,800	11,200	10,800
Florida	93,400	77,400	80,000
Texas	11,800	11,300	10,800
Arizona	320	260	200
ALL U.S. GRAPEFRUIT	117,320	100,160	101,800
LEMONS: 3/			
California	36,600	48,000	46,000
Arizona	5,600	6,000	6,000
ALL U.S. LEMONS	42,200	54,000	52,000
TANGERINES: 4/			
California 5/	4,400	5,000	4,800
Florida 6/	13,200	11,000	12,600
Arizona 5/	1,240	860	1,200
ALL U.S. TANGERINES	18,840	16,860	18,600

- 1/ ORANGES: California and Arizona, 1 carton = 37.5 lbs.; Florida, 1 carton = 45 lbs.; Texas, 1 carton = 42.5 lbs.
- 2/ GRAPEFRUIT: Arizona, 1 carton=32 lbs.; California, 1 carton = 33.5 lbs.; Florida, 1 carton = 42.5 lbs.; Texas, 1 carton = 40 lbs.
- 3/ LEMONS: All, 1 carton = 38 lbs.
- 4/ TANGERINES: California and Arizona, 1 carton = 37.5 lbs.; Florida, 1 carton = 47.5 lbs.
- 5/ Includes tangelos, tangerines, and tangors.
- 6/ Data for 2001-02 includes Robinson, Fallglo, Sunburst, Dancy, and Honey varieties. Data for 2002-03 through 2003-04 includes Fallglo, Sunburst, and Honey varieties only.

FLORIDA CITRUS

March weather in the citrus growing areas was mostly dry with cool nighttime temperatures and moderate to warm days. Several cold fronts passed through the State bringing overnight temperatures into the upper 30's in some northern locations. Daytime highs reached the mid-80's. The cold fronts brought very little rainfall with virtually none reported the first two weeks of the month. Rainfall during the third week brought up to two inches in some upper interior areas. Weather during the last of the month was cloudy and windy with very light amounts of coastal showers reported. Citrus trees in all areas are in excellent condition following the favorable weather of the past several months. By mid-month, lower interior and coastal area trees were in full bloom, followed by those in the upper interior area later in the month.

Early mid-season harvest is mostly over as the season nears completion. Valencia oranges are beginning to be harvested with good demand reported for fresh shipments. Weekly harvest by the last of the month was up to 7.00 million boxes. Grapefruit harvest for fresh shipments increased during the month, with harvest for processing also heavy. Honey tangerine harvest is strong with good demand reported. Temple harvest is complete for the season.



Strawberries - The 2004 strawberry production is expected to be a record 18.9 million cwt., up 3 percent from last year. Harvested acreage is estimated at 33,200, with a resulting yield of 570 cwt. per acre. Acreage was reported to be up in all major growing districts this year. Cooler temperatures got the season off to a slower start than last year, but relatively warmer temperatures in March helped strengthen strawberry plants. Many fields in the Oxnard District in Southern California sustained fruit damage during the beginning of February as powerful winds roared through the area, but disruption to the harvest cycle was minimal. Little fruit was lost due to storms that passed through the growing regions. Growing conditions then turned ideal as mild temperatures prevailed. Production and shipping returned to a traditional pace when compared to last year. Early season berries were reported to have good size, color and quality.

FRESH FRUIT: UNITED STATES PER CAPITA CONSUMPTION, 1981 TO DATE 1/

Year 2/	CITRUS FRUIT					TOTAL CITRUS 3/	NON-CITRUS FRUIT					
	Oranges & Temples	Tangerines, Tangelos, & Mandarins	Lemons	Limes	Grapefruit		Apples	Apricots	Avocados	Bananas	Blueberries	Cherries
	Pounds											
1981	12.4	2.0	2.0	0.4	6.7	23.5	16.9	0.1	1.6	21.5	0.2	0.5
1982	11.7	2.1	2.1	0.4	7.2	23.4	17.5	0.1	1.9	22.5	0.2	0.5
1983	15.0	2.3	2.3	0.5	7.8	28.0	18.3	0.1	2.2	21.3	0.1	0.7
1984	11.9	2.1	2.2	0.5	6.0	22.6	18.4	0.1	1.8	22.2	0.2	0.7
1985	11.6	1.5	2.3	0.6	5.5	21.5	17.3	0.2	1.5	23.5	0.3	0.4
1986	13.4	1.6	2.5	0.6	6.1	24.2	17.8	0.1	2.4	25.8	0.2	0.5
1987	12.8	1.8	2.5	0.5	6.4	24.0	20.8	0.1	1.6	25.0	0.2	0.7
1988	13.9	1.8	2.5	0.6	6.7	25.4	19.8	0.2	1.6	24.3	0.3	0.5
1989	12.2	1.7	2.4	0.7	6.6	23.6	21.2	0.1	1.1	24.7	0.2	0.5
1990	12.4	1.3	2.6	0.7	4.4	21.4	19.6	0.2	1.4	24.4	0.1	0.4
1991	8.4	1.4	2.6	0.8	5.9	19.0	18.1	0.1	1.4	25.1	0.2	0.4
1992	12.8	1.9	2.5	1.0	5.9	24.3	19.1	0.2	2.2	27.1	0.2	0.5
1993	14.2	1.9	2.6	1.0	6.2	25.8	19.0	0.1	1.3	26.6	0.3	0.4
1994	12.9	2.1	2.7	1.0	6.1	24.7	19.4	0.2	1.4	27.8	0.3	0.5
1995	11.8	2.0	2.8	1.2	6.0	23.9	18.7	0.1	1.6	27.1	0.3	0.3
1996	12.6	2.2	2.9	1.2	5.9	24.6	18.7	0.1	1.6	27.6	0.3	0.4
1997	13.9	2.5	2.8	1.2	6.2	26.5	18.1	0.1	1.7	27.2	0.3	0.6
1998	14.6	2.2	2.5	1.4	5.9	26.6	19.0	0.1	1.5	28.0	0.3	0.5
1999	8.4	2.2	2.6	1.4	5.8	20.3	18.5	0.1	1.9	30.7	0.3	0.6
2000	11.7	2.8	2.4	1.3	5.1	23.4	17.5	0.2	2.2	28.4	0.3	0.6
2001	11.9	3.0	3.0	1.5	4.8	24.1	15.6	0.1	2.5	26.6	0.3	0.8
2002	10.6	3.0	3.3	1.1	4.8	22.9	16.0	0.1	2.3	26.7	0.4	0.7
Year 2/	NON-CITRUS FRUIT CONTINUED										TOTAL NON- CITRUS 3/	TOTAL FRUIT 3/
	Cranberries	Grapes	Kiwifruit 4/	Mangos	Peaches & Nectarines	Pears	Pineapples	Papayas	Plums & Prunes	Straw- berries		
	Pounds											
1981	0.2	4.1	N/A	0.2	6.9	2.8	1.6	0.2	1.7	2.2	60.5	84.0
1982	0.2	5.7	0.1	0.3	5.4	2.9	1.7	0.2	1.1	2.4	62.4	85.9
1983	0.1	5.6	0.1	0.4	5.4	3.0	1.7	0.2	1.4	2.3	62.9	90.9
1984	0.1	6.1	0.2	0.4	6.7	2.5	1.5	0.3	1.8	3.0	66.0	88.6
1985	0.1	6.8	0.1	0.4	5.5	2.8	1.5	0.2	1.4	3.0	65.0	86.5
1986	0.1	7.1	0.2	0.5	5.8	3.0	1.7	0.2	1.3	2.9	69.6	93.8
1987	0.1	7.1	0.3	0.6	6.1	3.5	1.6	0.2	1.9	3.1	72.8	96.7
1988	0.1	7.7	0.3	0.4	6.8	3.2	1.8	0.2	1.7	3.3	72.0	97.4
1989	0.1	7.9	0.3	0.5	5.9	3.2	2.0	0.1	1.4	3.3	72.5	96.1
1990	0.1	7.9	0.5	0.5	5.5	3.2	2.1	0.2	1.5	3.2	70.8	92.1
1991	0.1	7.2	0.5	0.9	6.4	3.1	1.9	0.2	1.4	3.6	70.5	89.5
1992	0.1	7.2	0.4	0.7	6.0	3.1	2.0	0.2	1.8	3.6	74.3	98.5
1993	0.1	7.0	0.6	0.9	5.9	3.4	2.0	0.3	1.3	3.6	72.7	98.5
1994	0.1	7.3	0.6	1.0	5.4	3.4	2.0	0.3	1.6	4.1	75.1	99.9
1995	0.1	7.4	0.6	1.1	5.3	3.4	1.9	0.4	0.9	4.1	73.2	97.0
1996	0.1	6.8	0.5	1.3	4.4	3.1	1.9	0.5	1.4	4.3	73.0	97.6
1997	0.1	7.9	0.5	1.4	5.5	3.4	2.3	0.5	1.5	4.1	75.2	101.7
1998	0.1	7.1	0.6	1.5	4.8	3.3	2.8	0.5	1.2	3.9	75.1	101.7
1999	0.1	8.0	0.6	1.6	5.4	3.3	3.0	0.6	1.3	4.5	80.6	100.9
2000	0.1	7.3	0.6	1.8	5.4	3.2	3.2	0.7	1.2	4.8	77.4	100.8
2001	0.1	7.6	0.6	1.8	5.2	3.1	3.2	0.8	1.3	4.2	73.7	97.8
2002	0.1	8.6	0.5	2.0	5.3	2.9	3.8	0.8	1.3	4.9	76.4	99.2

1/ All non-citrus fruit data are on calendar-year basis, except apples (year begins in August of year shown), grapes, and pears (year begins in July). For oranges, the year begins in October for tangerines and tangelos, while the year begins in November for temples; grapefruit in September, and lemons in August of the prior year. The lime year began in April of the year shown.

2/ Preliminary 2002 figures.

3/ Some figures may not add due to rounding.

4/ Reporting began in 1982.