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CITRUS

MARCH FORECAST

MATURITY TEST RESULTS AND FRUIT SIZE



FLORIDA
AGRICULTURE

March 11, 2003

ALL ORANGES HELD AT 199.0 MILLION BOXES

The Florida forecast of all oranges for recorded utilization, released today by the Agricultural Statistics Board of the USDA, is continued at 199.0 million boxes. The forecast is made up of early and midseason oranges (including Navels) at 113.0 million boxes and late type (Valencia) oranges at 86.0 million boxes. In the past 10 seasons, the March all orange forecast has differed from the final recorded utilization by an average of 1.5 percent, with only three seasons above the final.

The weather conditions for Florida citrus in February were generally beneficial to the current crop. There were no freezing temperatures in major producing areas and the average temperatures were moderate. However, average rainfall was below normal and required caretakers to make extensive use of irrigation.

EARLY-MIDSEASON ORANGES STAY AT 113.0 MILLION BOXES

The forecast of the early and midseason oranges is carried forward at 113.0 million boxes. Volume utilization of this fruit is over and the declining estimated recorded utilization indicates that less than 2 percent of the forecast was left for harvest as of March 3, 2003. The Row Count conducted on February 26-27 indicated about that amount of harvestable rows remaining. There may be some revisions of use when the last several weeks become final. The Navel portion remains at 5.5 million boxes. The Row Count

FORECAST DATES 2002-03 SEASON	
April 10, 2003	May 12, 2003
June 11, 2003	July 11, 2003

survey showed over 5 percent of the rows remaining, however complete harvest may not occur.

VALENCIAS REMAIN AT 86.0 MILLION BOXES

The late type (Valencia) orange forecast at 86.0 million boxes is maintained. The average fruit size from the February survey decreased slightly from the level attained in January and lowered the projection slightly. However, the average fruit size is still the largest of the record that goes back to 1960.

The average loss from fruit droppage from sample trees in February increased at a lesser rate than the preceding months, but the level is still at the greatest loss factor in the preceding 10 seasons.

Citrus production, March 1, 2003
forecasts by varieties and states, with comparisons

Crop and State	Production		Forecast	
	2000-01	2001-02	Feb 11, 2003	Mar 11, 2003
--- 1,000 boxes ---				
Early, Midseason, and Navel Oranges:				
FLORIDA	128,000	128,000	113,000	113,000
California	35,500	34,000	40,000	40,000
Texas	2,000	1,530	1,500	1,500
Arizona	480	270	200	200
Total Above Varieties	165,980	163,800	154,700	154,700
Valencias:				
FLORIDA	95,300	102,000	86,000	86,000
California	19,000	22,000	21,000	22,000
Texas	235	210	180	180
Arizona	420	250	250	250
Total Valencias	114,955	124,460	107,430	108,430
All Oranges:				
FLORIDA	223,300	230,000	199,000	199,000
California	54,500	56,000	61,000	62,000
Texas	2,235	1,740	1,680	1,680
Arizona	900	520	450	450
Total All Oranges	280,935	288,260	262,130	263,130

Components used in the March Forecast

Type	Bearing trees (1,000)	Fruit per tree	Percent droppage	Fruit per box
Early-Mid	34,042	950	13	225
Navel	2,313	454	12	133
Valencia	41,682	524	20	190

FCOJ YIELD NOW 1.55 GALLONS

The all orange FCOJ yield projection is lowered from 1.57 to 1.55 gallons per box of 42.0 degrees Brix concentrate. This level is lower than the past two seasons when the all orange yield was 1.58 gallons per box. The early and midseason portion is currently at 1.491993 as of March 7 which was the last report from the Florida Citrus Processors Association. The projection of yield for Valencia oranges going into FCOJ has also been lowered to 1.65 gallons per box from 1.67.

These projections of yield assume the processing relationships of the past several seasons will be similar this year. Weather and harvest patterns can also have an influence on the final yields. The Maturity Test Results are on page 3 of this report for the remaining Valencias.

GRAPEFRUIT REMAINS AT 40.0 MILLION BOXES

The forecast of all grapefruit for certified utilization (including a pre-season allocation of 1.5 million boxes for gift fruit and local sales) is continued at 40.0 million boxes. Category breakdown remains unchanged at 16.0 million boxes of white varieties and 24.0 million colored. This forecast is 5 percent below the initial October forecast which was lowered to the current level in the December report.

February measurements of fruit size indicate the advanced harvest of both white and colored categories. More samples than usual had been harvested before the survey period. Average fruit sizes did not increase, indicating harvest of the most desirable sizes for fresh utilization. Droppage rates on the remaining samples continued to increase, although only slightly on white seedless but heavier on colored varieties. Size measurements in January (considered final month for expansion purposes) averaged higher than all but one season in the historical ten season series for white seedless and all but two for colored. Both categories were larger in the summer months than the ten season averages but cooler winter weather moderated growth rates. Droppage rates for whites were average in the summer months and remained so for the season but colored, which started higher in the summer and fall months and continued high, ended the season about one percent above the average.

Estimated utilization to March 1 for fresh use is ahead of the previous two seasons for colored varieties but behind for white. Exports have been strong this season while domestic shipments have lagged. Utilization by processors has been above one million boxes weekly the entire month of February and consists of packinghouse eliminations and direct to processor fruit.

Citrus production, March 1, 2003
forecasts by varieties and states, with comparisons

Crop and State	Production		Forecast	
	2000-01	2001-02	Feb 11, 2003	Mar 11, 2003
--- 1,000 boxes ---				
Grapefruit:				
FLORIDA-All	46,000	46,700	40,000	40,000
White ^{1/}	18,700	18,900	16,000	16,000
Colored ^{2/}	27,300	27,800	24,000	24,000
Texas	7,200	5,900	5,600	5,600
Arizona	250	160	100	100
California	6,300	6,000	5,600	5,600
Total Grapefruit	59,750	58,760	51,300	51,300
Lemons:				
California	22,600	19,000	23,000	23,000
Arizona	3,600	2,800	2,800	2,800
Total Lemons	26,200	21,800	25,800	25,800
Limes: Florida	250	150	^{3/}	^{3/}
Temples: Florida	1,250	1,550	1,400	1,400
Tangelos: Florida	2,100	2,150	2,400	2,400
K-Early: Florida	40	30	^{3/}	^{3/}
Tangerines:				
FLORIDA-All	5,600	6,600	5,000	5,000
Early ^{3/}	3,550	4,350	3,000	3,000
Honey	2,050	2,250	2,000	2,000
California ^{4/}	2,200	2,200	2,500	2,500
Arizona ^{4/}	650	620	450	450
Total Tangerines	8,450	9,420	7,950	7,950

^{1/} Includes seedy. ^{2/} Excludes two million boxes of economic abandonment. ^{3/} No forecast. ^{4/} 2000-01 through 2001-02 - Robinson, Fallglo, Sunburst, and Dancy; 2002-03 forecast - Fallglo and Sunburst only. ^{5/} Includes tangelos.

The route survey (Row Count) conducted February 26-27 indicates over 50 percent of the white grapefruit and over 60 percent of the colored grapefruit rows harvested. These figures are higher than those of the previous 6 seasons and fully support the forecast.

Components used in the March forecast

Type	Bearing trees (1,000)	Fruit per tree	Percent droppage	Fruit per box
White Grapefruit ^{1/}	3,784	398	9	79
Colored Grapefruit	6,352	387	12	87

^{1/} Seedless variety only.

EARLY TANGERINES STAY AT 3.0 MILLION BOXES

The forecast of early season tangerines (Fallglo and Sunburst varieties only) is continued at 3.0 million boxes. Harvest is virtually complete with limited amounts being delivered to processors. This season's harvest is 31 percent less than the 4.35 million boxes harvested in the previous season which included only about 100,000 boxes of the Robinson and Dancy varieties.

HONEY TANGERINES CONTINUED AT 2.0 MILLION BOXES

The forecast of late season Honey tangerines is continued at 2.0 million boxes. Fruit sizes remain near the ten season average after having started the season larger than any size in the 10 year series. Droppage rates started the season below average and continue slightly below the average which is about 40 percent. Fresh shipments have been advanced as packers harvested in anticipation of cold weather in January and remain above the level of the previous two seasons.

TEMPLES REMAIN AT 1.4 MILLION BOXES

The Temple forecast is continued at 1.4 million boxes. This is 10 percent less than the 1.55 million boxes utilized last season. If the forecast is realized, it will equal the second smallest crop on record which occurred in the freeze damaged 1989-90 season. Average Temple fruit size is larger than any in the ten season series. Fruit droppage is above average although following a normal pattern. Fresh shipments have declined to the lowest levels on record. Most of the remaining crops will be harvested for processing use.

TANGELOS HELD AT 2.4 MILLION BOXES

The tangelo forecast is continued at 2.4 million boxes, the same as the initial forecast in October. Utilization of tangelos has been more complete this season with the most fruit processed since the 1998-99 season. Fresh shipments however, continue to decline. The route survey indicates some rows having fruit available for harvest. Weekly processing movement has continued but is declining as warm weather affects the usability of the remaining crops.

Unadjusted Maturity Tests: Average of regular bloom fruit from sample groves, 2001-02 and 2002-03 seasons

Fruit type (No. groves) test date	Acid		Solids (Brix)		Ratio		Unfinished juice per box		Solids per box	
	2001-02	2002-03	2001-02	2002-03	2001-02	2002-03	2001-02	2002-03	2001-02	2002-03
	Percent		Percent				Pounds		Pounds	

Juice and solids per box are unadjusted and not comparable to plant test results.

ORANGES:

Late (144-142)

Sep 1	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Oct 1	2.20	2.05	8.86	8.69	4.10	4.32	47.72	48.92	4.23	4.25
Nov 1	1.76	1.65	9.20	9.22	5.29	5.68	51.91	52.39	4.78	4.83
Dec 1	NA	1.43	NA	10.05	NA	7.14	NA	53.23	NA	5.35
Jan 1	1.26	1.24	10.96	10.85	8.87	8.84	55.42	54.27	6.08	5.89
Feb 1	1.12	1.20	11.70	11.48	10.59	9.69	55.51	54.54	6.50	6.26
Mar 1	1.06	1.08	12.33	12.24	11.84	11.52	54.91	53.22	6.78	6.51

NOTICE: All samples were run through an FMC 091 machine using mechanical pressure only. This machine utilizes a .040 short strainer and standard 5/8-inch orifice tube. The beam settings are also identical to past tests and nor restrictions are used.

Maturity test averages by areas, March 1, 2003

Fruit type	Groves sampled	Acid	Solids (Brix)	Ratio	Unfinished juice per box	Solids per box
	Number	Percent	Percent		Pounds	Pounds

ORANGES:

Late

Indian River Dist.	27	1.13	12.73	11.36	53.47	6.81
Other Areas	115	1.06	12.12	11.56	53.16	6.44

FRUIT SIZE COMPARISONS BY TYPES TO PREVIOUS SEASONS

Size frequency distributions from the February size survey are shown in the table below. The distributions are by percent of fruit falling within the size range of each 4/5-bushel container. Fruit sizes were measured on trees in sample groves during the period February 13 through 28, 2003. Comparable sizes for 2001 and 2002 are also shown. These measurements are of fruit from spring bloom and exclude summer bloom in all seasons.

The chart below compares the relationship of the February 2003 Valencia orange fruit size measurements with those taken in February 2002. The diameter measurements shown are the minimum values of each eighth inch range except for the smallest value.

FLORIDA CITRUS: Size frequency distributions from February measurements

Type of fruit and size in 4/5-bushel containers	2001	2002	2003
--- Percent ---			
Valencia oranges:			
64 and larger	3.4	6.9	14.7
80	18.4	23.7	33.9
100	40.3	37.8	36.4
125	29.5	23.0	12.7
163 and smaller	8.4	8.6	2.3
White seedless grapefruit:			
32 and larger	20.3	16.2	34.9
36	21.4	18.7	24.7
40	22.0	21.9	17.6
48	17.5	20.5	11.4
56	8.9	10.9	5.2
63 and smaller	9.9	11.8	6.2
Colored seedless grapefruit:			
32 and larger	7.8	7.9	25.0
36	14.8	14.9	22.8
40	24.9	21.5	20.5
48	22.7	21.7	14.6
56	12.8	13.3	7.7
63 and smaller	17.0	20.7	9.4

CHART 1: Valencia orange size frequency by diameter from February measurements.

