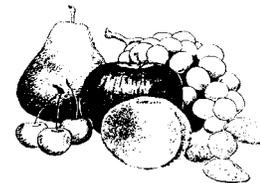


California Fruit & Nut Review



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CALIFORNIA AGRICULTURAL
STATISTICS SERVICE

HIGHLIGHTS IN THIS ISSUE:

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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. Bloom continued throughout March in late variety stone fruit orchards and began in a few apple, cherry, and pear orchards in the Central Valley by month's end. Rainfall in parts of the Central Valley during the beginning of the month caused some damage in areas by knocking off blooms. Growers continued to apply blossom sprays to control diseases and insect pests as necessary. Developing fruit became visible in many early variety stone fruit orchards by the end of March. A few growers in the Central Valley began thinning fruit in apricot and plum orchards. Girdling activities commenced in a few plum orchards to improve fruit size. Swelling buds and newly opened green shoots appeared in many grape vineyards by mid-month as vines responded to the warm, sunny weather.

Many grape growers cultivated and irrigated their vineyards to avoid potential damage from cold nighttime temperatures. Removal of grape vineyards and planting of new tree fruit orchards continued across the State. Strawberry fields in the Central Valley were in full bloom by month's end and fruit set appeared to be good where reported. Pruning and brush shredding continued in olive orchards. Buds were forming in many avocado orchards. Most almond orchards were fully leafed and developing well by month's end. Early variety walnut orchards started to leaf out and develop flower clusters during the last week in March. Blight spray treatments continued in walnut orchards. Irrigation, pruning, soil amendment, and foliar nutrient applications were underway in some harvested citrus orchards. The Navel orange harvest continued throughout the month. Quality remained good, but decreased due to puff, crease, high color, soft fruit, and rind staining. Early variety Valencia oranges were harvested in some areas of the Central Valley. Marsh Ruby and Rio Red grapefruit were harvested in the desert areas, while the Pummelo harvest continued in the Central Valley. Lemons were picked throughout the month.

FRUIT AND NUT STATISTICS AT A GLANCE

Crop	Bearing Acreage		Yield Per Acre		Estimated Production		Production Percent Change	Next Crop Update
	2001	2002	2001	2002	2001	2002		
NUT CROPS	Acres		Pounds		1,000 Pounds			
Almonds (Shelled) ^{1/}	525,000	530,000	1,580	2,000	830,000	1,060,000	28	May 9, 2003
Pecans	2,600	2,600	1,420	1,380	3,700	3,600	-3	October 10, 2003
Pistachio (In-Shell)								
Marketable In-Shell	---	---	---	---	126,500	240,000		
Shelling Stock	---	---	---	---	34,500	60,000		
Total ^{2/}	78,000	83,000	2,060	3,610	161,000	300,000	86	July 31, 2003
Walnuts (In-Shell) ^{3/}	196,000	200,000	Tons		1,000 Tons		-8	September 3, 2003
			1.56	1.41	305.0	282.0		
FRUIT CROPS	Acres				1,000 Tons			
Apples	29,000	26,000	8.97	8.08	260.0	210.0	-19	August 12, 2003
Apricots	18,000	17,000	4.28	5.00	77.0	85.0	10	June 11, 2003
Cherries	25,000	26,000	2.21	2.13	55.3	55.5	N/C	June 11, 2003
Grapes, Raisin ^{4/}	235,000	246,000	9.43	10.80	2,215.0	2,650.0	20	July 11, 2003
Grapes, Table	88,000	88,000	8.10	8.52	713.0	750.0	5	July 11, 2003
Grapes, Wine	480,000	491,000	6.36	6.31	3,051.0	3,100.0	2	July 11, 2003
Grapes, All ^{4/}	803,000	825,000	7.45	7.88	5,979.0	6,500.0	9	July 11, 2003
Olives	36,000	36,000	3.72	2.75	134.0	99.0	-26	August 12, 2003
Peaches, Clingstone	28,800	31,000	16.50	18.10	476.0	562.0	18	May 12, 2003
Peaches, Freestone	39,000	39,000	9.94	10.20	387.5	398.0	3	May 12, 2003
Pears, Bartlett	14,000	13,500	19.60	19.60	275.0	264.0	-4	June 11, 2003
Pears, Other	4,300	4,300	6.98	6.98	30.0	30.0	N/C	August 12, 2003
Prunes (Dried Weight) ^{5/}	86,000	73,000	1.74	2.16	150.0	158.0	5	May 30, 2003
BERRIES			Cwt.		1,000 Cwt.			
Strawberries	28,500	29,600	595	600	16,957	17,760	5	July 10, 2003
CITRUS CROPS ^{6/}	2001-02	2002-03	2001-02	2002-03	2001-02	2002-03		
			Cartons		1,000 Cartons			
Grapefruit	14,000	13,000	857	862	12,000	11,200	-7	July 11, 2003
Lemons	49,500	49,000	768	939	38,000	46,000	21	July 11, 2003
Oranges, Navel	128,000	127,500	531	627	68,000	80,000	18	July 11, 2003
Oranges, Valencia	66,500	64,000	662	688	41,000	44,000	7	July 11, 2003
Tangerines ^{7/}	9,000	9,200	489	543	4,400	5,000	14	July 11, 2003

^{1/} Almond Subjective Forecast Report released May 9 at 12:00 PM. Almond Objective Measurement Report released June 26 at 12:00 PM.

^{2/} Pistachio Acreage and Objective Measurement reports released July 31 at 12:00 PM.

^{3/} Walnut Objective Measurement Report released September 3 at 12:00 PM.

^{4/} The Raisin Industry Diversion Program (RID) had 41,000 acres in 2001, but 27,000 acres in 2002. These acres were deducted from the bearing acreage.

^{5/} Prune Forecast Report released May 30 at 12:00 PM.

^{6/} Grapefruit -- 33.5 lbs. per carton; Lemons -- 38.0 lbs. per carton; Oranges -- 37.5 lbs. per carton; Tangerines -- 37.5 lbs. per carton.

^{7/} Includes tangelos, tangerines and tangors.

Navel Oranges - The 2002-03 Navel orange forecast is 80.0 million cartons, unchanged from the January 2003 forecast, but up 18 percent from last season. Harvesting continues, but the remaining crop has been heavily graded due to lower quality. Puff, crease, and rind breakdowns are among the problems noted.

Valencia Oranges - The 2002-03 Valencia orange forecast is 44.0 million cartons, unchanged from the March 2003 forecast, but up 7 percent from last season. Harvesting commenced in the southern desert earlier in the year, and by mid-March was well underway in the Central Valley. The southern crop has been heavily graded due to wind scarring and other defects, but eating quality is reported to be excellent. The Central Valley crop has exhibited good exterior and interior quality thus far.

Grapefruit - The 2002-03 grapefruit forecast is 11.2 million cartons, unchanged from the January 2003 forecast, but down 7 percent from last season. The Rio Red and Marsh Ruby grapefruit harvests continued in the desert area. Exterior quality is good with excellent color. Shape is uniform with only an occasional sheep nose shaped fruit. Texture is smooth in all sizes. Flavor and eating quality are excellent. The Pummelo variety harvest continued in the Central Valley with good exterior quality. Shape is normal with defects including light scars and sunburn.

Lemons - The 2002-03 lemon forecast is 46.0 million cartons, unchanged from the January 2003 forecast, but up 21 percent from last season. Quality, condition, color, shape, and texture are good in the Central Valley. However, high winds in the southern end of the valley caused considerable damage. Scarring, fruit drops, and injuries resulted from the winds. Picking volumes in the southern coastal area of the State varied from heavy to light. Fruit sizes are expected to increase due to recent rains. Color of fruit is varied. Quality has declined somewhat due to an increase of wind-damaged fruit. Harvest is virtually complete in the Desert region. Quality has declined since last period.

Tangerines - The 2002-03 tangerine forecast is 5.00 million cartons, unchanged from the January 2003 forecast, but up 14 percent from last season. The season is progressing with no major problems to date. Mild weather occurred during the bloom period. Shape is normal with overall quality and flavor reported to be very good. Defects consist of light scars and sunburn.

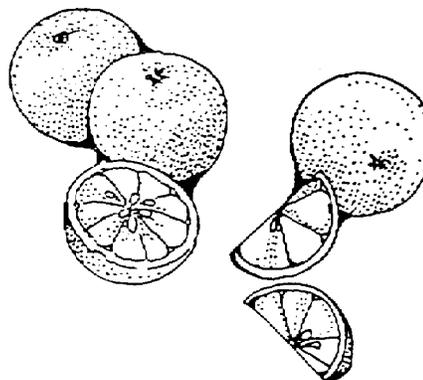
CITRUS FRUITS PRODUCTION BY STATE AND U.S.

Crop and State	2000-01	2001-02	2002-03 Forecast
	1,000 Cartons		
ORANGES: 1/			
California, All	109,000	109,000	124,000
Navel and Misc.	71,000	68,000	80,000
Valencia	38,000	41,000	44,000
Florida	446,600	460,000	396,000
Texas	4,470	3,480	3,160
Arizona	1,800	1,040	800
ALL U.S. ORANGES	561,870	573,520	523,960
GRAPEFRUIT: 2/			
California, All	12,600	12,000	11,200
Florida	92,000	93,400	80,000
Texas	14,400	11,800	11,000
Arizona	500	320	200
ALL U.S. GRAPEFRUIT	119,500	117,520	102,400
LEMONS: 3/			
California	45,200	38,000	46,000
Arizona	7,200	5,600	5,800
ALL U.S. LEMONS	52,400	43,600	51,800
TANGERINES: 4/			
California 5/	4,400	4,400	5,000
Florida 6/	11,200	13,200	10,400
Arizona 5/	1,300	1,240	800
ALL U.S. TANGERINES	16,900	18,840	16,200

- 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 2000-01 through 2001-02 includes Robinson, Fallglo, Sunburst, Dancy, and Honey varieties. Data for 2002-03 includes Fallglo, Sunburst, and Honey varieties only.

FLORIDA CITRUS

March was a lot wetter than the previous two months of 2003. Most of Florida's citrus producing counties reported above average rainfall. Surface soil moisture was excellent throughout the month. Virtually all of the healthy citrus trees are in very good condition. The cold weather in January and February put the trees in near ideal physical condition for the bloom period once the warm moist weather arrived. This year's bloom cycle was in full swing the first two weeks of the month and then tapered off toward the end with one of the most prolific blooms in recent time. Harvest of early and mid-season oranges slowed considerably by the second week March as the supplies were running out. Picking crews rapidly moved to the Valencia oranges for both fresh and processing. With the additional labor from the completed early-mid orange harvest, grapefruit movement increased rapidly with most of the fruit coming from the lower east coast. Harvesting of Temples, Honey tangerines, and tangelos slowed toward the end of March as very few crops remain to be picked. A few fresh fruit packing houses and juice plants closed during early March as they did not have sufficient fruit to operate efficiently. They planned to open and run Valencia oranges by the end of the month. Caretakers were very busy mowing, chopping, and discing cover crops to help generate new growth and bloom during the month. Hedging and topping were reported in all areas of harvested groves. Post bloom nutritional sprays were being applied in groves with complete petal-drop.



Strawberries - The 2003 strawberry forecast is 17.8 million cwt., up 5 percent from last year. Harvested acreage is estimated at 29,600, with a resulting yield of 600 cwt. per acre. Acreage is reported to be up in all major growing districts this year. December rains helped to strengthen the plants. Many fields in Southern California sustained fruit damage the first week of January as powerful Santa Ana winds roared through the area. However, disruption to the harvest cycle was short lived. Growing conditions turned ideal as mild temperatures prevailed. Production and shipping have been on a record pace, with early-season berries reported to have good size, color, and quality.

FRESH FRUIT: UNITED STATES PER CAPITA CONSUMPTION, 1980 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	Cherries	Cranberries
Pounds												
1980	14.3	2.2	1.9	0.4	7.3	26.1	19.2	0.1	0.8	20.8	0.7	0.1
1981	12.4	2.0	2.0	0.4	6.7	23.5	16.9	0.1	2.1	21.5	0.5	0.2
1982	11.7	2.1	2.1	0.4	7.2	23.4	17.5	0.1	1.6	22.5	0.5	0.2
1983	15.0	2.3	2.3	0.5	7.8	28.0	18.3	0.1	1.9	21.3	0.7	0.1
1984	11.9	2.1	2.2	0.5	6.0	22.6	18.4	0.1	2.2	22.2	0.7	0.1
1985	11.6	1.5	2.3	0.6	5.5	21.5	17.3	0.2	1.8	23.5	0.4	0.1
1986	13.4	1.6	2.5	0.6	6.1	24.2	17.8	0.1	1.5	25.8	0.5	0.1
1987	12.8	1.8	2.5	0.5	6.4	24.0	20.8	0.1	2.4	25.0	0.7	0.1
1988	13.9	1.8	2.5	0.6	6.7	25.4	19.8	0.2	1.6	24.3	0.5	0.1
1989	12.2	1.7	2.4	0.7	6.6	23.6	21.2	0.1	1.6	24.7	0.5	0.1
1990	12.4	1.3	2.6	0.7	4.4	21.4	19.6	0.2	1.1	24.4	0.4	0.1
1991	8.4	1.4	2.6	0.8	5.9	19.0	18.1	0.1	1.4	25.1	0.4	0.1
1992	12.8	1.9	2.5	1.0	5.9	24.3	19.1	0.2	1.4	27.1	0.5	0.1
1993	14.2	1.9	2.6	1.0	6.2	25.8	19.0	0.1	2.2	26.6	0.4	0.1
1994	12.9	2.1	2.7	1.0	6.1	24.7	19.4	0.2	1.3	27.8	0.5	0.1
1995	11.8	2.0	2.8	1.2	6.0	23.9	18.7	0.1	1.4	27.1	0.3	0.1
1996	12.6	2.2	2.9	1.2	5.9	24.6	18.7	0.1	1.6	27.6	0.4	0.1
1997	13.9	2.5	2.8	1.2	6.2	26.5	18.1	0.2	1.6	27.2	0.6	0.1
1998	14.6	2.2	2.5	1.4	5.9	26.6	19.0	0.1	1.7	28.0	0.5	0.1
1999	8.4	2.2	2.6	1.4	5.8	20.3	18.5	0.1	1.5	30.7	0.6	0.1
2000	11.7	2.8	2.4	1.3	5.1	23.5	17.4	0.2	1.9	28.4	0.6	0.1
2001	12.3	2.7	3.0	1.5	4.8	24.3	15.8	0.1	2.2	26.5	0.8	0.1
Year 2/	NON-CITRUS FRUIT CONTINUED										TOTAL NON-CITRUS 3/	TOTAL FRUIT 3/
	Grapes	Kiwifruit 4/	Mangos	Peaches & Nectarines	Pears	Pineapples	Papayas	Plums & Prunes	Strawberries			
Pounds												
1980	4.0	---	0.3	7.1	2.6	1.5	0.2	1.5	2.0	60.9	87.0	
1981	4.1	---	0.2	6.9	2.8	1.6	0.2	1.7	2.2	60.9	84.4	
1982	5.7	0.1	0.3	5.4	2.9	1.7	0.2	1.1	2.4	62.0	85.4	
1983	5.6	0.1	0.4	5.4	3.0	1.7	0.2	1.4	2.3	62.4	90.4	
1984	6.1	0.2	0.4	6.7	2.5	1.5	0.3	1.8	3.0	66.2	88.7	
1985	6.8	0.1	0.4	5.5	2.8	1.5	0.2	1.4	3.0	65.1	86.6	
1986	7.1	0.2	0.5	5.8	3.0	1.7	0.2	1.3	2.9	68.5	92.8	
1987	7.1	0.3	0.6	6.1	3.5	1.6	0.2	1.9	3.1	73.4	97.3	
1988	7.7	0.3	0.4	6.8	3.2	1.8	0.2	1.7	3.3	71.8	97.2	
1989	7.9	0.3	0.5	5.9	3.2	2.0	0.1	1.4	3.3	72.8	96.4	
1990	7.9	0.5	0.5	5.5	3.2	2.1	0.2	1.5	3.2	70.3	91.7	
1991	7.2	0.5	0.9	6.4	3.1	1.9	0.2	1.4	3.6	70.3	89.4	
1992	7.2	0.4	0.7	6.0	3.1	2.0	0.2	1.8	3.6	73.4	97.6	
1993	7.0	0.6	0.9	5.9	3.4	2.0	0.3	1.3	3.6	73.3	99.1	
1994	7.3	0.6	1.0	5.4	3.4	2.0	0.3	1.6	4.1	74.8	99.6	
1995	7.4	0.6	1.1	5.3	3.4	1.9	0.4	0.9	4.1	72.6	96.5	
1996	6.8	0.5	1.3	4.4	3.1	1.9	0.5	1.4	4.3	72.7	97.3	
1997	7.9	0.5	1.4	5.5	3.4	2.3	0.5	1.5	4.1	74.7	101.3	
1998	7.1	0.6	1.5	4.8	3.3	2.8	0.5	1.2	3.9	75.0	101.6	
1999	8.0	0.6	1.6	5.4	3.3	3.0	0.6	1.3	4.5	79.9	100.2	
2000	7.3	0.6	1.8	5.5	3.2	3.2	0.7	1.2	5.0	77.1	100.5	
2001	7.6	0.6	1.8	5.3	3.1	3.2	0.8	1.3	4.2	73.3	97.5	

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, Temples, tangerines, and tangelos, the year begins in November; grapefruit in September, and lemons in August of the prior year. Lime year began in April of the year shown.

2/ Preliminary 2001 figures.

3/ Some figures may not add due to rounding.

4/ Reporting began in 1982.