



United States Department of Agriculture
National Agricultural Statistics Service



Pacific Region Fruit & Nut Review

The Pacific Region Includes the States of CA, HI and NV

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MARCH CROP COMMENTS – CALIFORNIA

Oranges, mandarins, tangelos, lemons, and grapefruit continued to be packed for domestic and foreign markets. Navel orange, Cara Cara, Moro Blood, and Minneola Tangelo exports continued to increase. Mid-month saw orange trees being topped in advance of the bloom. Seedless Mandarins and Murcotts were covered with netting to prevent cross pollination.

Pruning and shredding continued in tree fruit and nut orchards. Unseasonably warm temperatures caused a few early variety stone fruit orchards to bloom. Fungicide applications were done to protect the blooms. Grape vineyard pruning was in full swing and canes were being shredded and tied. Vineyards with cover crops showed good growth in between vines. Many vineyards continued to receive herbicide, fungicide, and miticide treatments. Mechanical and chemical pre-emergence herbicide applications continued in fruit tree orchards and vineyards throughout the month. Orchards were irrigated due to the lack of precipitation. Kiwifruit was packed and exported. Olive trees were dormant the first two weeks of February, then pruning began about the third week. Blooming was observed on peach, plum, and nectarine trees in orchards in the southern regions of California later in the month.

FRUIT AND NUT STATISTICS AT A GLANCE

Crop	Bearing Acreage		Yield Per Acre		Estimated Production		Production Percent Change	Next Crop Update
	2013	2014	2013	2014	2013	2014		
NUT CROPS	<i>Acres</i>		<i>Pounds</i>		<i>1,000 Pounds</i>			
Almonds (Shelled)	840,000	860,000	2,390	2,170	2,010	1,870	-7	April 23, 2015
Pecans	---	---	---	---	5,000	5,000	(NC)	July 17, 2015
Pistachio (In-Shell)	---	---	---	---	379,000	409,000	8	
Marketable In-Shell	---	---	---	---	91,000	105,000	15	
Shelling Stock	---	---	---	---	470,000	514,000	9	July 17, 2015
Total	203,000	215,000	2,320	2,390	470,000	514,000		
			<i>Tons</i>		<i>1,000 Tons</i>			
Walnuts (In-Shell)	280,000	290,000	1.76	1.95	492	565	15	July 17, 2015
Macadamias (Hawaii)	16,000	16,000	1.28	1.25	20.5	20.0	-2	July 17, 2015
FRUIT CROPS								
Apples	15,200	15,000	8.88	7.67	135	115	-15	July 17, 2015
Apricots	9,500	9,500	5.73	5.83	54.4	55.4	2	July 17, 2015
Cherries	33,000	33,000	2.48	1.21	82.0	40.0	-51	July 17, 2015
Grapes, Raisin	200,000	200,000	11.40	9.10	2,270	1,819	-20	July 17, 2015
Grapes, Table	110,000	110,000	11.20	10.00	1,227	1,100	-10	July 17, 2015
Grapes, Wine	570,000	570,000	7.45	6.84	4,245	3,900	-8	July 17, 2015
Grapes, All	880,000	880,000	8.80	7.75	7,742	6,819	-12	July 17, 2015
Table Olives	40,000	40,000	4.15	2.06	166.0	82.3	-50	July 17, 2015
Peaches, Clingstone	22,000	20,000	16.70	16.60	368	332	-10	July 17, 2015
Peaches, Freestone	24,000	24,000	11.70	11.80	280	284	1	July 17, 2015
Pears, Bartlett	8,800	8,500	20.10	18.50	177	157	-11	July 17, 2015
Pears, Other	2,800	2,600	15.40	13.50	43.0	35.0	-19	July 17, 2015
Plums, Dried (Prunes)	50,000	48,000	1.70	1.98	85	95	12	July 17, 2015
BERRIES			<i>Cwt.</i>		<i>1,000 Cwt.</i>			
Strawberries 1/	41,500	41,500	665	665	27,573	27,577	(Z)	July 17, 2015
CITRUS CROPS 2/	2013-14	2014-15	2013-14	2014-15	2013-14	2014-15		
			<i>Cartons</i>		<i>1,000 Cartons</i>			
Grapefruit	10,000	---	800	---	8,000	8,000	(NC)	April 9, 2015
Lemons	46,000	---	826	---	38,000	40,000	5	April 9, 2015
Oranges, Navel	133,000	---	586	---	78,000	80,000	3	April 9, 2015
Oranges, Valencia	36,000	34,000	667	588	24,000	20,000	-17	April 9, 2015
Mandarins & Mandarin Hybrids 3/	45,000	---	644	---	29,000	31,000	7	April 9, 2015

(NC) No Change

1/ Includes fresh market and processing.

2/ All citrus fruit-- 40.0 lbs per carton.

3/ Includes tangelos, tangerines, and tangors.

CALIFORNIA CITRUS

The California Valencia orange forecast is 10.0 million boxes (400,000 tons), unchanged from previous forecast but down 9 percent from the previous season. This results in a California all orange forecast of 50.0 million boxes (2.00 million tons), unchanged from the January forecast. Objective survey measurements taken during

January and February indicated that fruit set per tree was lower than the previous year and the lowest since 2009, but the measured average fruit size was slightly larger than the previous year.

FLORIDA CITRUS

Producers across the citrus growing region reported highs temperatures ranging from the 70s to 80s, while minimum temperatures were in the low 40s and upper 30s. A cold snap during the third week of the month brought temperatures below freezing in practically the complete citrus growing region. Temperatures below 30 degrees were sustained for less than two hours in nearly all places, causing minimal negative effects to citrus trees and fruit. Rainfall amounts were well above average in the Central and Northern areas of the citrus growing region with several counties receiving more than four inches of rainfall. Most of the Indian River District and Southern area counties received far less rainfall. As per the U.S. Drought Monitor, last updated February 24, 2015, abnormally dry conditions were present in Collier

County, parts of Hendry County, and in the lower half of the Indian River District.

Processing plants were up and running at full capacity the first two weeks of the month, taking both eliminations and field run fruit. Several plants finished early and midseason oranges during the second half of the month and transitioned to grapefruit or began setting up to run Valencia oranges. Early variety fruit harvested for the fresh market included primarily Honey tangerines and colored grapefruit. A small amount of tangelos, white grapefruit, and early and midseason oranges also went fresh.

CITRUS FRUIT PRODUCTION FORECAST, BY STATE AND U.S.

Crop and State	2012-13	2013-14	2014-15
	1,000 Cartons		
ORANGES: 1/			
California, All	109,000	100,000	100,000
Navel & Misc.	85,000	78,000	80,000
Valencia	24,000	22,000	20,000
Florida	267,200	209,200	204,000
Texas	3,576	3,552	4,030
U.S. TOTAL	379,776	312,752	308,030
GRAPEFRUIT: 2/			
California, All	9,000	8,000	8,000
Florida	36,700	31,300	30,000
Texas	12,200	11,400	12,000
U.S. TOTAL	57,900	50,700	50,000
LEMONS: 3/			
California	42,000	38,000	40,000
Arizona	3,600	3,600	4,400
U.S. TOTAL	45,600	41,600	44,400
TANGERINES & MANDARINS: 4/			
California 5/	26,000	29,000	31,000
Florida	6,560	5,800	5,000
Arizona 5/	400	400	440
U.S. TOTAL	32,960	35,200	36,440

1/ ORANGES: California , 1 carton = 40 lbs; Florida, 1 carton = 45 lbs.;

Texas, 1 carton = 42.5 lbs.; Arizona, 1 carton = 37.5 lbs.

2/ GRAPEFRUIT: California, 1 carton = 40 lbs; Florida, 1 carton = 42.5 lbs.;

Texas, 1 carton = 40 lbs.; Arizona, 1 carton = 33.5 lbs.

3/ LEMONS: 1 carton = 40 lbs.

4/ TANGERINES: California, 1 carton = 40 lbs; Florida, 1 carton = 47.5 lbs.;

Arizona, 1 carton = 37.5 lbs.

5/ Includes tangelos, tangerines, and tangors.

SUMMARY OF GRAPE TONNAGES AND PRICES

The 2014 crush totaled 4,142,934 tons, down 12 percent from the record high 2013 crush of 4,700,377 tons. Red wine varieties accounted for the largest share of all grapes crushed, at 2,138,294 tons, down 12 percent from 2013. The 2014 white wine variety crush totaled 1,754,503 tons, down 4 percent from 2013. Tons crushed of raisin type varieties totaled 155,514, down 53 percent from 2013, and tons crushed of table type varieties totaled 94,623, down 25 percent from 2013.

The Grape Crush Report includes the total number of tons crushed for concentrate production. In determining grape tonnage crushed for concentrate production, each processor was required to report the estimated equivalent tons of grapes crushed for grape concentrate. For the 2014 season, this total was 469,927 tons, 11 percent of the 2014 grape crush total. This report provides only the aggregate figure for grapes crushed for concentrate production and does not include information by district, type, or variety.

The 2014 average price per ton of all varieties was \$743.07, up 4 percent from 2013. Average prices for the 2014 crop by type were as follows: red wine grapes, \$892.06, up 5 percent from 2013; white wine grapes, \$595.61, down 4 percent from 2013; raisin grapes, \$232.79, down 9 percent; and table grapes, \$233.70, up 5 percent.

LEADING GRAPE VARIETIES AND DISTRICTS

In 2014, Chardonnay accounted for the largest percentage of the total crush volume with 17.3 percent. Cabernet Sauvignon accounted for the second leading percentage of crush with 12.3 percent of the total crush. The next eight highest percentages of grapes crushed included wine and raisin grape varieties. Thompson Seedless, the leading raisin grape variety crushed for 2014, held 3.2 percent of the total crush.

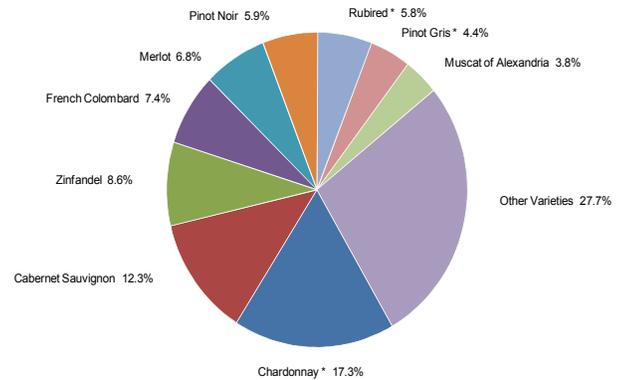
District 13, (Madera, Fresno, Alpine, Mono, Inyo Counties; and Kings and Tulare Counties north of Nevada Avenue (Avenue 192)), had the largest share of the State's crush, at 1,336,946 tons. The average price per ton in District 13 was \$307.18.

Grapes produced in District 4 (Napa County) received the highest average price of \$4,077.31 per ton, up 10 percent from 2013. District 3 (Sonoma and Marin counties) received the second highest return of \$2,318.92, up 4 percent from 2013.

The 2014 Chardonnay price of \$860.60 was down 1 percent from 2013, and the Cabernet Sauvignon price of \$1,426.30 was up 6 percent from 2013. The 2014 average price for Zinfandel was \$623.70, down 4 percent from 2013, while the Merlot average price was up 3 percent from 2013 at \$774.70 per ton.

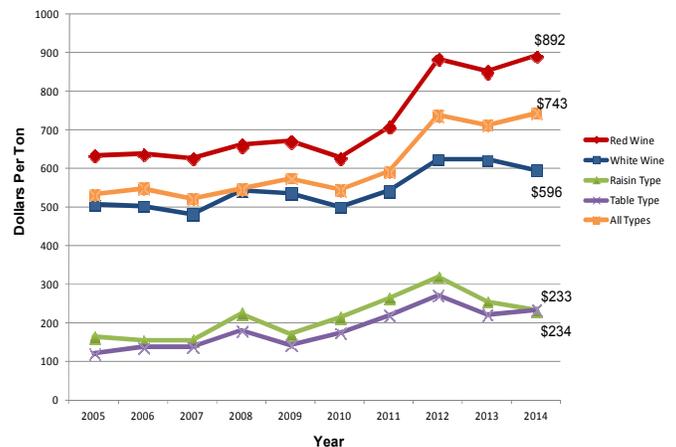
Leading Varieties Crushed

PERCENT OF TOTAL 2014 CRUSH



Source: USDA, National Agricultural Statistics Service, Pacific Regional Field Office - California
*Synonyms for variety names are shown on Page 5 of the Grape Crush Report.

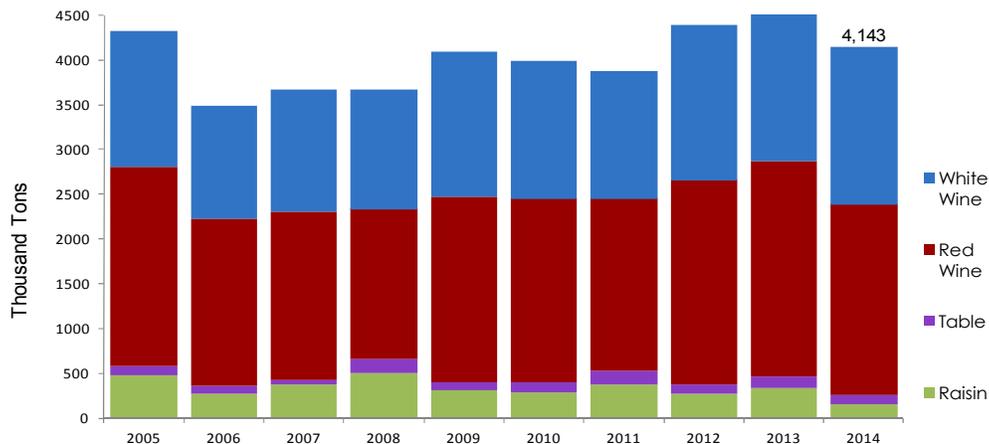
GRAPE CRUSH, DOLLARS PER TON 2005 - 2014



Source: USDA, National Agricultural Statistics Service, Pacific Regional Field Office - California

CALIFORNIA GRAPES

Tons Crushed 2005 - 2014

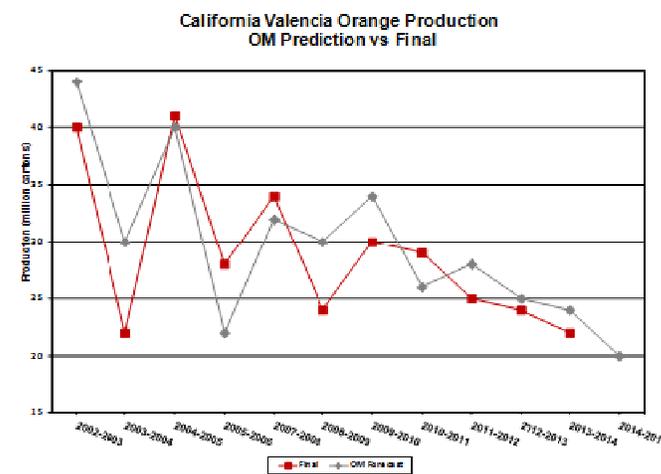


Source: USDA, National Agricultural Statistics Service, Pacific Regional Field Office - California

VALENCIA ORANGE PRODUCTION FORECAST 20 MILLION CARTONS

The March 2014-15 Valencia orange forecast is 20 million cartons. This forecast was based on the results of the 2014-15 Valencia Orange Objective Measurement (O.M.) Survey, which was conducted from January 16 to February 14, 2015. Estimated fruit set per tree, fruit diameter, trees per acre, bearing acreage, and oranges per carton were used in the statistical models estimating production.

The season has been dry in many areas and measurements are indicating an average fruit size, but the fruit set has been negatively impacted. Survey data indicated an average fruit set per tree of 545, well below the five-year average of 639 and the lowest set since the 2008-09 season. The average March 1 diameter was 2.571 inches, slightly above the five-year average of 2.562.

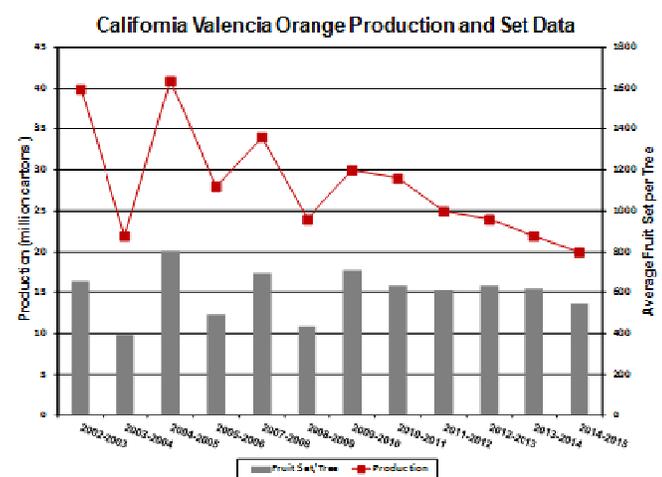


SURVEY SAMPLE

A sample of 577 Valencia orange groves was randomly selected proportional to acreage, county, and variety representation for the state, with 539 of these groves being utilized in this survey. Once a grove was randomly chosen and grower permission was granted, two trees were randomly selected for each grove. For each randomly selected tree, its trunk was measured along with all connected branches. A random number table was then used to select a branch, and then all connected branches from the randomly-selected branch were measured.

This process was repeated until a branch was reached with no significant limbs beyond it. This randomly-selected branch, called the terminal branch, was then closely inspected to count all fruit connected to it, as well as all of the fruit along the path from the trunk to the terminal branch. Since each selected path has a probability of selection associated with it, a probability-based method was then applied to estimate a fruit count for the entire tree.

In the last week of the survey period, fruit diameter measurements were made on the right quadrant of four trees surrounding the two trees of every third sampled grove. These measurements were used to estimate an average fruit diameter per tree. The sampled groves were primarily in the top Valencia orange producing counties of Tulare, Kern, Fresno, Ventura and San Diego.



SURVEY HISTORY

A Valencia Orange Objective Measurement Survey was conducted from the 1985-86 to 1993-94 seasons before suspension due to a lack of funding. The survey has been conducted since it was reinstated for the 1999-00 season, with the exception of the 2006-07 season due to a substantial freeze. The data from the first three years after the survey was reinstated were used for research purposes in developing crop-estimating models.