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CITRUS

MARCH FORECAST

MATURITY TEST RESULTS AND FRUIT SIZE



FLORIDA
AGRICULTURE

March 10, 2005

ALL ORANGES REDUCED TO 153.0 MILLION BOXES

The USDA Agricultural Statistics Board has released the all orange crop forecast for Florida which is lowered from last month's 162.0 million boxes to 153.0 million boxes. Comprising the forecast are 81.0 million boxes of early-midseason-Navel oranges and 72.0 million boxes of the later maturing Valencia variety. If realized, this crop will be 37 percent less than harvested last season, and the fewest boxes harvested since the 1991-92 season.

In the past 10 seasons, the March forecast of all orange has differed from final production by an average of 1.7 million boxes with three seasons higher and seven lower. Final utilization may differ from these forecasts because of the extreme variability in average fruit per tree and assumptions made on loss of fruit following the hurricanes in 2004.

EARLY-MID-NAVELS LOWERED TO 81.0 MILLION BOXES

Early-mid-Navel oranges were reduced three million boxes to 81.0 million. The primary indicator for lowering the forecast is the utilization of 74.0 million boxes of early-mids to the beginning of the month, plus expected receipts to processing plants. The Row Count survey, conducted March 1-2, 2005, shows 92 percent rows harvested. It is expected that the final rows to be harvested will not be as productive as the initial rows.

CITRUS PRODUCTION, MARCH 1, 2005

FORECASTS BY VARIETIES AND STATES, WITH COMPARISONS

Crop and State	Production		Forecast	
	2002-03	2003-04	Feb 9, 2005	Mar 10, 2005

--- 1,000 boxes ---

EARLY, MIDSEASON, AND NAVAL ORANGES:

FLORIDA	112,000	126,000	84,000	81,000
California	42,000	38,000	44,000	44,000
Texas	1,350	1,420	1,500	1,500
Arizona	200	300	240	240
Total Above Varieties	155,550	165,720	129,740	126,740

VALENCIAS:

FLORIDA	91,000	116,000	78,000	72,000
California	20,000	14,000	16,500	20,000
Texas	220	230	250	250
Arizona	270	170	190	190
Total Valencias	111,490	130,400	94,940	92,440

ALL ORANGES:

FLORIDA	203,000	242,000	162,000	153,000
California	62,000	52,000	60,500	64,000
Texas	1,570	1,650	1,750	1,750
Arizona	470	470	430	430
Total All Oranges	267,040	296,120	224,680	219,180

FORECAST DATES 2004-05 SEASON

April 8, 2005	May 12, 2005
June 10, 2005	July 12, 2005

Early-mid season size and drop surveys were completed in December, providing the final components used in the forecast preparation. The follow-up survey conducted in January confirmed fruit sizes to be below average, and drop rates to be high.

The **Navel** portion of the forecast remains unchanged at 2.5 million boxes. Harvesting of Navels is relatively complete. Certified utilization through March 1 is 1.96 million boxes. It is anticipated that less than the allocated 1.0 million boxes will be used in gift fruit and local sales.

SURVEY COMPONENTS USED IN THE FORECAST ^{1/}

Type	Bearing trees	Fruit per tree	Percent droppage	Fruit per box
	(1,000)			
Early-Mid	31,999	863	18	263
Navel	1,862	249	21	138
Valencia	41,208	529	24	217

^{1/} November survey data is considered final for Navels, December for early-mids, and March for Valencias.

VALENCIAS LOWERED TO 72.0 MILLION BOXES

The Valencia forecast has been lowered by six million boxes to 72.0 million boxes. The growth rate during the past month was less than projected. The measured fruit size is smaller than nine of the last ten seasons. It will now take seven more pieces to fill a 90 pound equivalent box. There has been an increase in the drop rate in the last month. If the droppage continues at this pace through the final survey, it is projected that 24 percent will be lost prior to harvest. Although not a record level for a non-freeze year, it is the highest since 1990-91. Harvesting of Valencias is just beginning.

FCOJ YIELD 1.58 GALLONS PER BOX

The all orange projected FCOJ yield remains at 1.58 gallons per box. The early-midseason portion is increased from 1.52 gallons per box to 1.53. The late portion is unchanged at 1.66. Last seasons final yield for all orange was 1.56 gallons per box.

GRAPEFRUIT 13.0 MILLION BOXES

The Florida forecast of grapefruit for certified utilization (including an allocation of 700,000 boxes of gift fruit and local sales) is maintained at 13.0 million boxes, unchanged since December. The forecast consists of 3.0 million boxes of white grapefruit and 10.0 million boxes of colored varieties. If realized, this forecast will be 68 percent less than harvested last season and the lowest since the 1935-36 season. Assumptions are made based on the fruit per tree number published in the October forecast. Final utilization could differ from the forecast if the fruit per tree due to initial fruit loss from the hurricanes is different than projected.

A result of the row count survey conducted on March 1-2, 2005 in conjunction with utilization through that time is the primary indicator for the March grapefruit forecast. The January size and drop surveys provided the final components used in the forecast preparation, and a follow-up survey conducted in February showed size slightly larger and drop higher on all grapefruit varieties.

The **white** grapefruit forecast remains at 3.0 million boxes. The row count survey shows 68 percent rows harvested. Estimated utilization to March 1 is

2.3 million boxes, compared to 7.7 million boxes the same time last year.

The **colored** grapefruit forecast is maintained at 10.0 million boxes. The row count survey shows 75 percent rows harvested. Estimated utilization until March 1 was 6.6 million boxes, compared to 15.5 million boxes the same time last year.

SURVEY COMPONENTS USED IN THE FORECAST ^{1/}

Type	Bearing trees	Fruit per tree	Percent droppage	Fruit per box
	(1,000)			
White Grapefruit ^{2/}	2,861	109	22	86
Colored Grapefruit	5,366	210	26	97

^{1/} January survey data is considered final.

^{2/} Seedless variety only.

ALL TANGERINES REMAIN AT 4.5 MILLION BOXES

The forecast of all tangerines is continued at 4.5 million boxes. Forecast for the early varieties (**Fallglo and Sunburst**) is 2.5 million boxes and the later maturing **Honey** variety is 2.0 million boxes.

The forecast of utilization for early tangerines is unchanged at 2.5 million boxes. Early tangerine harvest is relatively complete by this time in the season. **Fallglo** tangerine harvest is complete at slightly more than 650,000 boxes including other use, and **Sunburst** tangerines estimated utilization to March 1 is at 1.85 million boxes, including other use.

The **Honey** tangerine forecast is unchanged at 2.0 million boxes, down 200,000 boxes from the initial forecast set in October. The month after size and drop survey showed size was slightly smaller than the prior month, and drop at 67 percent was up more than 13 percentage points from the previous month. Although not the highest drop, this year's drop rate is higher than nine of the last ten years.

TEMPLES REMAIN AT 700,000 BOXES

The Temple forecast remains at 700,000 boxes. If attained, this will be the smallest amount since the forecasting of Temples began in the 1953-54 season. With just over 45 percent rows picked, utilization for Temples is 460,000 boxes compared to 850,000 boxes the same time last year.

TANGELOS NOW AT 1.5 MILLION BOXES

Tangelos increased to 1.5 million boxes, 100,000 more than the initial October forecast of 1.4 million boxes. The increase was based primarily on estimated utilization to March 1 at slightly fewer than 1.5 million boxes, up 300,000 boxes from last month.

CITRUS PRODUCTION, MARCH 1, 2005

FORECASTS BY VARIETIES AND STATES, WITH COMPARISONS

Crop and State	Production		Forecast	
	2002-03	2003-04	Feb 9, 2005	Mar 10, 2005
--- 1,000 boxes ---				
Grapefruit:				
FLORIDA-All	38,700	40,900	13,000	13,000
White	16,200	15,900	3,000	3,000
Colored	22,500	25,000	10,000	10,000
Texas	5,650	5,700	6,200	6,200
Arizona	130	140	180	180
California	5,600	5,400	5,300	5,300
Total Grapefruit	50,080	52,140	24,680	24,680
Lemons:				
California	24,000	18,000	19,500	19,500
Arizona	3,000	3,000	2,400	2,400
Total Lemons	27,000	21,000	21,900	21,900
Temples: Florida	1,300	1,400	700	700
Tangelos: Florida	2,350	1,000	1,400	1,500
Tangerines:				
FLORIDA-All	5,500	6,500	4,500	4,500
Early ^{1/}	3,000	3,600	2,500	2,500
Honey	2,500	2,900	2,000	2,000
California ^{2/}	2,800	2,700	2,900	2,900
Arizona ^{2/}	430	690	450	450
Total Tangerines	8,730	9,890	7,850	7,850

^{1/} Fallglo and Sunburst varieties.

^{2/} Includes tangelos.

UNADJUSTED MATURITY TESTS: Average of regular bloom fruit from sample groves, 2003-04 and 2004-05 seasons

Fruit type (No. groves) test date	Acid		Solids (Brix)		Ratio		Unfinished juice per box		Solids per box	
	2003-04	2004-05	2003-04	2004-05	2003-04	2004-05	2003-04	2004-05	2003-04	2004-05
	<i>Percent</i>		<i>Percent</i>				<i>Pounds</i>		<i>Pounds</i>	

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

ORANGES:

Early (NA-9)

Sep 1	NA	1.67	NA	9.31	NA	5.59	NA	44.59	NA	4.14
Oct 1	NA	1.14	NA	9.37	NA	8.34	NA	48.25	NA	4.53
Nov 1	NA	0.89	NA	9.94	NA	11.35	NA	53.07	NA	5.28
Dec 1	NA	0.80	NA	10.91	NA	13.65	NA	54.10	NA	5.90
Jan 1	NA	0.79	NA	11.61	NA	14.78	NA	53.79	NA	6.25
Feb 1	NA	0.72	NA	11.68	NA	16.23	NA	51.83	NA	6.05
Mar 1	NA	0.75	NA	12.77	NA	17.13	NA	48.28	NA	6.15

Mid (NA-5)

Sep 1	NA	1.96	NA	9.22	NA	4.73	NA	42.67	NA	3.92
Oct 1	NA	1.34	NA	9.09	NA	6.91	NA	49.02	NA	4.46
Nov 1	NA	0.95	NA	9.48	NA	10.21	NA	54.25	NA	5.13
Dec 1	NA	0.87	NA	10.64	NA	12.45	NA	52.06	NA	5.54
Jan 1	NA	0.79	NA	10.91	NA	13.83	NA	53.33	NA	5.81
Feb 1	NA	0.83	NA	12.21	NA	14.66	NA	52.05	NA	6.34
Mar 1	NA	0.76	NA	12.19	NA	16.27	NA	49.85	NA	6.08

Late (149-144)

Sep 1	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Oct 1	2.01	2.43	8.92	8.63	4.48	3.59	46.28	46.52	4.13	4.02
Nov 1	1.64	1.92	9.56	8.84	5.90	4.65	51.05	50.28	4.88	4.45
Dec 1	1.40	1.56	10.39	9.72	7.53	6.30	53.44	53.23	5.55	5.18
Jan 1	1.26	1.39	11.13	10.46	8.94	7.57	53.38	54.00	5.94	5.64
Feb 1	1.18	1.23	11.87	10.99	10.12	9.01	52.01	55.05	6.18	6.06
Mar 1	1.06	1.11	12.66	11.93	12.01	10.85	52.53	54.97	6.65	6.56

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 no restrictors are used.

MATURITY TEST AVERAGES BY AREAS, MARCH 1, 2005

Fruit type	Groves sampled	Acid	Solids (Brix)	Ratio	Unfinished juice per box	Solids per box
	<i>Number</i>	<i>Percent</i>	<i>Percent</i>		<i>Pounds</i>	<i>Pounds</i>
ORANGES:						
Early						
Indian River Dist.	1	0.90	13.75	15.28	48.83	6.71
Other Areas	8	0.73	12.64	17.36	48.21	6.08
Midseason						
Indian River Dist.	NA	NA	NA	NA	NA	NA
Other Areas	5	0.76	12.19	16.27	49.85	6.08
Late						
Indian River Dist.	22	1.07	11.82	11.10	55.39	6.55
Other Areas	119	1.12	11.95	10.81	54.89	6.56

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 14 through 28, 2005. Comparable sizes for 2003 and 2004 are also shown. These measurements are of fruit from spring bloom and exclude summer bloom in all seasons.

FLORIDA CITRUS: Size frequency distributions from February measurements

Type of fruit and size in 4/5-bushel containers	2003	2004	2005
--- Percent ---			
Valencia oranges:			
64 and larger	14.7	11.2	3.7
80	33.9	29.8	19.7
100	36.4	38.4	43.7
125	12.7	16.8	25.3
163 and smaller	2.3	3.8	7.6
White seedless grapefruit:			
32 and larger	34.9	26.7	29.3
36	24.7	21.0	23.9
40	17.6	20.3	16.9
48	11.4	13.2	13.5
56	5.2	7.1	6.4
63 and smaller	6.2	11.7	10.0
Colored seedless grapefruit:			
32 and larger	25.0	12.1	18.1
36	22.8	20.2	23.4
40	20.5	25.3	20.9
48	14.6	17.1	17.6
56	7.7	10.3	9.3
63 and smaller	9.4	15.0	10.7
Temples:			
80 and larger	59.2	38.3	30.0
100	22.5	30.4	46.0
120	10.0	18.8	21.0
156 and smaller	8.3	12.5	3.0
Honey tangerines:			
80 and larger	33.7	40.5	18.0
100	30.9	32.1	32.8
120	25.2	17.9	31.4
176	5.2	4.0	10.0
210 and smaller	5.0	5.5	7.8

The chart below compares the relationship of the February 2005 Valencia orange fruit size measurements with those taken in February 2004. The diameter measurements shown are the minimum values of each eighth inch range except for the smallest value.

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

