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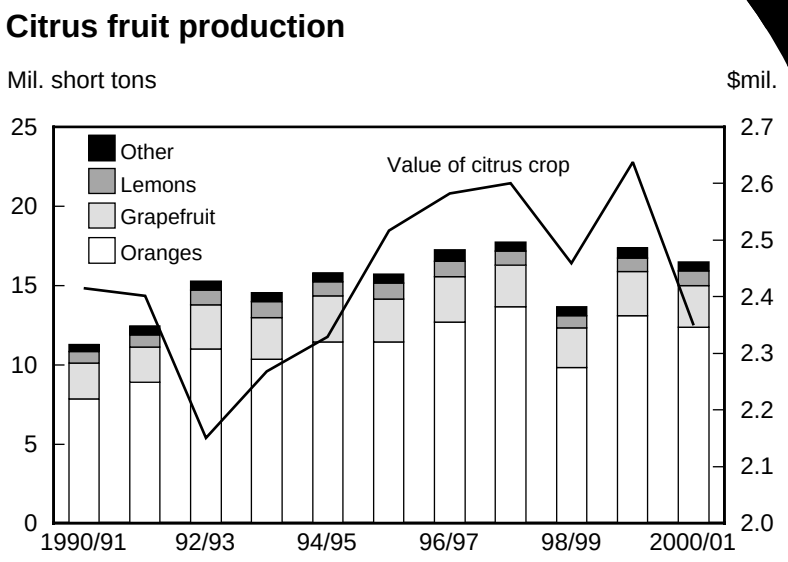
Fruit and Tree Nuts

Situation and Outlook Report



2000/01 forecast.

Source: National Agricultural Statistics Service, USDA.

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This summer, ERS is launching two online newsletters on specialty crops – a new *Fruit and Tree Nuts Outlook* will *alternate each month* with a new *Vegetables and Melons Outlook.*

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Fruit and Tree Nuts Outlook *Vegetables and Melons Outlook*

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Fruit and Tree Nuts Situation and Outlook Report. Market and Trade Economics Division, Economic Research Service, U.S. Department of Agriculture, March 2001, FTS-291.

Contents

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Approved by the World Agricultural Outlook Board. Summary released March 22, 2001. The summary of the next *Fruit and Tree Nuts Situation and Outlook* is scheduled for release on September 6, 2001. Summaries and full text of Situation and Outlook reports may be accessed electronically via the ERS website at www.ers.usda.gov.

The *Fruit and Tree Nuts Situation and Outlook* is published two times a year and supplemented by a yearbook. To order, call 1-800-999-6779 in the United States or Canada. Other areas please call (703) 605-6220. Or write ERS-NASS, 5285 Port Royal Road, Springfield, VA 22161.

Summary

The index of prices received by growers for fruit averaged 12 percent lower in 2000 than 1999. Prices declined for all major fresh fruit except apples. Prices for processing citrus also declined. The return to a more normal size citrus crop in 2000 after substantial losses in California from a freeze the preceding year, contributed to the overall price decline.

The Consumer Price Index (CPI) for fresh fruit averaged 3 percent lower in 2000 than 1999. Consumers paid higher prices at the retail level for Red Delicious apples and bananas. Lower prices for citrus fruit, especially oranges, drove the CPI down. Barring any weather-related problems this spring and early summer, we can expect the 2001 CPI to continue lower than a year ago. This winter provided sufficient chill hours for the noncitrus crops to produce good supplies this summer and fall.

The current citrus crop is forecast to be almost a million tons smaller than last year's crop, although it is still larger than the 1998/99 crop. If realized, the 2000/01 crop of 16.5 million tons would be the second smallest in the last 5 years. All the major citrus crops, except lemons, are expected to be smaller this year. Declines in crop size are predicted for the two largest producing States, Florida and California, but increases are expected in Texas and Arizona.

Crop size is estimated to be 12.4 million tons, 7.1 million tons of navel and other early to mid-season orange varieties, and 5.3 million tons of Valencia, the late-season variety. The 2000/01 orange crop is forecast to be 6 percent smaller than the previous crop. Drought conditions and freezing temperatures in Florida contributed to the reduction in expected crop size.

California's orange crop is projected to reach 2.2 million tons this year, 12 percent below the 1999/2000 crop. The number of fruit per tree was down this year, resulting in larger sized navel oranges than last year. Plenty of rain this past winter also helped fruit size. The Valencia orange crop is forecast to reach 938,000 tons in 2000/01, 7 percent below a year ago, but higher than the freeze-reduced crop of 2 years ago. Fresh orange exports are up so far this marketing year (November-December) over the same period a year ago. Exports increased to all major markets. Asian markets are strong this year, and orange exports to China have grown rapidly since it opened its market to U.S. citrus last year.

Florida's orange production is expected to be 4 percent below a year ago. Lack of rain and cold weather for much of the growing season caused fruit size to be below average. Orange juice production is forecast at 1.4 million single-strength equivalent (sse) gallons, down 4 percent from last year but 16 percent above 2 years ago when there was a smaller crop. Juice yields are projected at 1.58 gallons per box, up from 1.55 gallons in 1999/2000. Despite the expected smaller level of production in 2000/01, juice supplies are predicted to be up 1 percent from last year. Record-large beginning stocks in October, the beginning of the new marketing year, coupled with an expected increase in imports without much change forecast in exports, result in the projection for orange juice supplies to total 2.4 billion sse gallons. Demand for fruit by processors should increase as harvesting of the Valencia crop picks up. The strong demand for the smaller crop should push prices up, benefiting growers. Prices have been low in the beginning of the season as processors reduced stocks.

The U.S. grapefruit crop is forecast at 2.6 million tons, 6 percent smaller than 1999/2000, but still larger than the 2 previous seasons. The Florida crop, which accounts for 80 percent of U.S. production, is expected to decline 8 percent. The cool, dry winter in Florida this year limited fruit growth. Fruit size is the third smallest in the last 10 years. The small size and lagging maturity levels of the fruit have slowed utilization. Also slowing utilization are the large beginning stocks of grapefruit juice, reducing demand by processors. The lagging demand for grapefruit this year has lowered grower prices in Florida after 2 years of increases. Fresh grapefruit exports rose 1 percent from September through December 2000 over the same period the previous year. Exports to Japan and the European Union were higher.

The 2000/01 lemon crop is estimated to total 927,000 tons, the largest crop since 1996/97. If realized, the crop will be 7 percent bigger than last year. Both California and Arizona are expecting larger crops. The large crop is putting downward pressure on grower and retail prices.

Tangerine, Temple, and tangelo production are projected to be lower in 2000/01 than the previous year. The tangerine crop, the largest of the specialty citrus crops, is expected to be 16 percent smaller than last season's record-large crop. It is expected, however, to be larger than the crops for the 2 years prior. Tangerine prices have been averaging higher this year and should stay strong for the remainder of the season as imports decline.

The 2000 utilized production of noncitrus fruit was estimated at about 18.2 million short tons, up 5 percent from 1999. Many fruit orchards and vineyards in California and Washington experienced generally favorable weather conditions during 2000 that have been conducive to high production. The good performance of many of the fruit crops in these two States balanced out production declines brought by weather problems in other regions. U.S. utilized production increased for grapes, peaches, strawberries, prunes and plums, blackberries, blueberries, raspberries, tart cherries,

California figs and kiwifruit, and Hawaiian bananas, papayas, and pineapples.

The preliminary estimate of the value of noncitrus fruit production for 2000 was a record $8.1 billion, up less than 1 percent from the previous year. Much of the increase came from a 5- percent increase in the value of the 2000 grape crop, the most valuable noncitrus crop in the United States.

Based on the U.S. Department of Agriculture's (USDA) preliminary estimates, total U.S. apple production for 2000 is 10.6 billion pounds, down less than 1 percent from a year earlier. The average price for apples received by U.S. growers in 2000 was $300 per short ton, about the same as a year ago. The large Washington crop, however, will likely contribute to increased fresh-market supplies in the United States during 2000/01 compared with the previous year. Consequently, prices for fresh-market apples will likely average lower than a year ago.

Freezing temperatures in late December and early January slowed the progress of Florida's 2001 strawberry winter crop. Shipments have been behind last year. While no major damage was reported, the prolonged cold weather delayed bloom. Also, wet fields resulting from irrigating to protect the crop from freezing temperatures hindered harvesting. Although shipment volume picked up by mid-February, overall shipments through early March were still down significantly from last year. In California, slightly smaller acreage is expected to be devoted to strawberry production this year. Increased plantings of new, everbearing, high-yielding varieties are expected to make up for some of the reduced acreage and keep production near last year's record-high crop.

Based on estimates from both Florida and California, domestically-grown avocados will likely be in abundant supply this year. Because overall domestic supplies in 2000/01 are anticipated to exceed last season, avocado prices are likely to average lower. So far, 2000/01 shipments from California during November to late February have been running 10 percent ahead of the same period in 1999/2000.

Early indications point to another strong crop of California peaches and nectarines in 2001, according to industry sources. Abundant supplies of good quality peaches and nectarines are expected, but this same situation may not hold true for plums. Heavy rains in early March hampered pollination, particularly for early plum varieties that were already in full bloom. A strong growing season may put downward pressure on stone fruit prices this summer. However, if export markets remain strong like a year ago, the downward pressure on prices could be moderated.

U.S. imports of Chilean fruit are projected to be up for 2000/01. Favorable weather throughout most of Chile's fruit-growing season has benefited the country's production of apples, pears, table grapes, avocados, stone fruit, and kiwifruit for this marketing season. Improvement in both yields and quality for most of these crops point to the prospect of increased Chilean fruit imports into the United States this year. Also fueling the growth in Chilean shipments to the United States is the devaluation of the Euro against the U.S. dollar. Chilean exporters are shifting some fruit shipments to the United States that would normally be bound for the European market.

Total tree nut production was 16 percent lower this year due to the alternate bearing nature of nut trees. Production was down for all nut crops except pistachios. Pistachio production reached a record 243 million tons in 2000/01. Bearing acreage was up for all the major California nut crops—almonds, pistachios, and walnuts. Macadamia nut bearing acreage in Hawaii and hazelnut bearing acreage in both Washington and Oregon declined for the third straight year. The smaller crops resulted in higher season-average grower prices for almonds, hazelnuts, and pecans. Despite a smaller crop in 2000/01, macadamia nut growers received lower prices for their crop, as did pistachio nut growers with their large crop drawing down prices.

Fruit Price Outlook

Fruit Grower Prices Averaged Lower in 2000

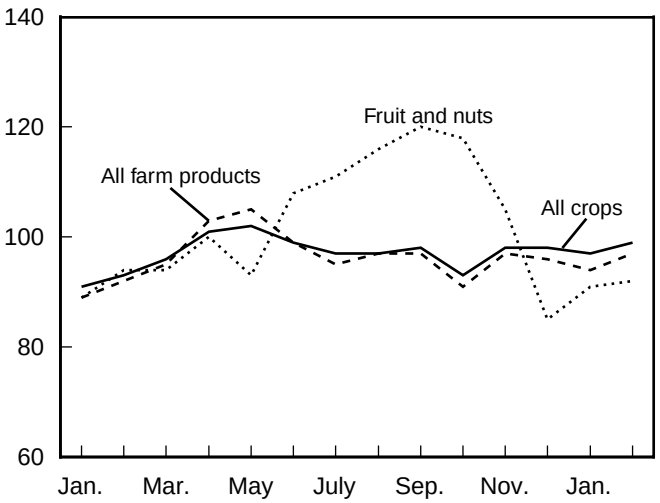
The index of prices received by growers for fruit averaged 12 percent lower in 2000 than 1999 (table 1). Prices declined for all major fresh fruit except apples. Prices for processing citrus also declined. The return to a more normal size citrus crop in 2000, after substantial losses in California from a freeze the preceding year, contributed to the overall price decline. The index in January 2001 was 2 percent above the previous January and 7 percent above December 2000 due to higher prices for strawberries and fresh oranges. In February, the index rose 1 percent from January but fell 2 percent from February 2000. Higher prices for fresh oranges and grapefruit drove prices up from January. Weak demand this February, however, has lowered prices from February 2000 for apples, pears, and grapefruit. An expected large crop of lemons this year is keeping lemon prices below a year ago.

The Consumer Price Index (CPI) for fresh fruit averaged 3 percent lower in 2000 than 1999. Consumers paid higher prices at the retail level for Red Delicious apples, bananas, Thompson seedless grapes, and strawberries. Lower prices for citrus fruit, however, especially oranges, drove the CPI down. Valencia orange prices averaged 36 percent lower than the previous year and navel orange prices averaged 27 percent lower. The January 2001 CPI was 3 percent below December 2000 and 2 percent below January 2000. Barring

Figure 1

Indexes of prices received by farmers, 2000-2001

1990-92=100

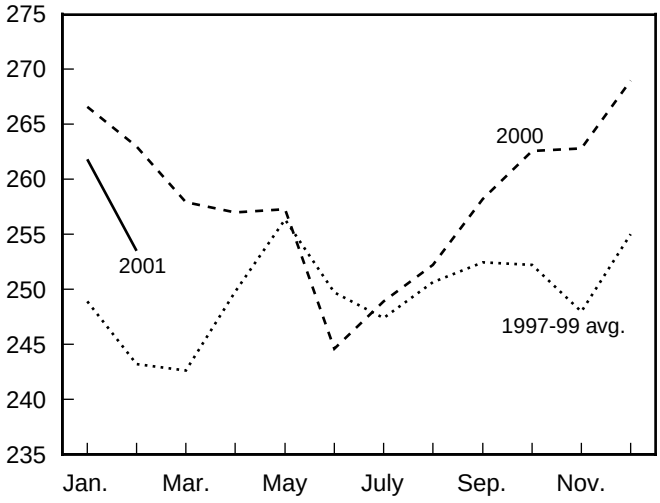


Source: National Agricultural Statistics Service, USDA.

Figure 2

U.S. consumer price index for fresh fruit

1982-84=100



Source: Bureau of Labor Statistics, USDL.

Table 1--Index of prices received by growers for fruit and nuts, 1993-2001

Month	1993	1994	1995	1996	1997	1998	1999	2000	2001
					1990-92=100				
Jan.	72	79	74	95	98	88	96	89	91
Feb.	72	79	74	95	96	101	106	94	92
Mar.	69	84	76	104	108	105	112	94	
Apr.	73	86	81	100	86	108	119	100	
May	81	92	101	114	104	114	115	93	
June	97	97	105	134	128	116	126	108	
July	101	100	111	130	123	126	130	111	
Aug.	113	102	127	131	122	134	131	116	
Sep.	121	105	118	144	130	128	129	120	
Oct.	119	97	113	140	121	127	126	118	
Nov.	106	88	99	125	110	115	116	105	
Dec.	86	76	90	103	97	96	95	85	
Annual	93	90	97	118	110	113	117	103	

Source: National Agricultural Statistics Service,USDA.

any weather-related problems this spring and early summer, the 2001 CPI is expected to continue lower than a year ago. This winter provided sufficient chill hours for the noncitrus crops to provide good supplies this summer and fall.

Citrus fruit dominate the retail markets during the winter months. Lower prices for grapefruit and lemons are driving the overall CPI down (table 2). Prices for Red Delicious apples were lower than a year ago and have been falling since August. Large apple stocks have put downward pressure on prices, helping consumers with lower prices at the retail level. Prices for navel oranges, however, are above December and a year ago January. The large size of the fruit and good quality have pushed prices up. Although the navel orange crop is smaller this year than last, strong competition from imported fruit, such as summer fruit from Chile and clementines from Spain, kept retail prices lower for November and December. Lemon prices have been averaging below a year ago so far this marketing year (beginning in August). From August through January, retail prices averaged 16 percent lower than in 1999/2000. The larger lemon crop in both California and Arizona has driven down its price.

Table 2--U.S. monthly retail prices for selected fruits and juices, 1998-2001

Month	Valencia oranges				Navel oranges				Orange juice, concentrate 1/				Grapefruit			
	1998	1999	2000	2001	1998	1999	2000	2001	1998	1999	2000	2001	1998	1999	2000	2001
	--Dollars per pound--				--Dollars per pound--				--Dollars per 16 fl.oz.--				--Dollars per pound--			
Jan.	--	--	--	--	0.525	0.830	0.607	0.638	1.601	1.753	1.823	1.863	0.499	0.543	0.567	0.563
Feb.	--	--	--	--	0.507	0.889	0.586	0.660	1.568	1.780	1.811	1.909	.481	0.545	0.572	0.583
Mar.	--	--	--		0.505	0.869	0.572		1.587	1.741	1.807		.503	0.546	0.556	
Apr.	--	--	--		0.571	0.944	0.573		1.634	1.779	1.819		.510	0.556	0.551	
May	--	0.865	--		0.672	--	0.638		1.589	1.764	1.802		.491	0.606	0.585	
June	0.664	0.942	--		--	--	0.699		1.633	1.758	1.800		.587	0.712	0.603	
July	0.683	0.959	0.666		--	--	--		1.655	1.813	1.875		.695	0.778	0.633	
Aug.	0.679	0.989	0.639		--	--	--		1.668	1.825	1.882		.738	0.803	0.672	
Sep.	0.650	0.974	0.547		--	--	--		1.599	1.825	1.837		.750	0.762	0.704	
Oct.	0.643	0.955	0.559		--	--	--		1.655	1.784	1.863		.767	0.710	0.706	
Nov.	0.621	--	--		--	0.884	0.725		1.654	1.841	1.884		.618	0.631	0.592	
Dec.	--	--	--		0.608	0.641	0.624		1.679	1.822	1.878		.548	0.582	0.581	

	Lemons				Red Delicious apples				Bananas				Peaches			
	1998	1999	2000	2001	1998	1999	2000	2001	1998	1999	2000	2001	1998	1999	2000	2001
	--Dollars per pound--				--Dollars per pound--				--Dollars per pound--				--Dollars per pound--			
Jan.	1.026	1.402	1.436	1.082	0.922	0.860	0.952	0.808	0.473	0.489	0.490	0.500	--	--	--	--
Feb.	0.976	1.274	1.416	1.138	0.960	0.870	0.974	0.830	0.489	0.509	0.528	0.496	1.894	1.856	1.773	1.774
Mar.	0.959	1.167	1.338		0.949	0.852	0.960		0.475	0.506	0.517		--	1.941	--	
Apr.	0.946	1.188	1.298		0.974	0.870	0.957		0.511	0.482	0.510		--	--	--	
May	1.027	1.159	1.200		0.955	0.881	0.927		0.510	0.492	0.509		--	--	--	
June	1.059	1.183	1.195		1.000	0.893	0.918		0.507	0.502	0.506		1.425	1.413	1.211	
July	1.262	1.282	1.253		0.990	0.905	0.940		0.530	0.494	0.512		1.179	1.160	1.180	
Aug.	1.405	1.397	1.375		0.935	0.921	0.928		0.489	0.490	0.490		1.065	1.098	1.143	
Sep.	1.428	1.463	1.357		0.971	0.972	0.922		0.476	0.481	0.488		1.221	1.100	1.282	
Oct.	1.462	1.535	1.321		0.902	0.919	0.899		0.470	0.471	0.496		--	--	--	
Nov.	1.453	1.538	1.173		0.878	0.902	0.833		0.487	0.480	0.479		--	--	--	
Dec.	1.372	1.414	1.111		0.854	0.918	0.816		0.510	0.494	0.487		--	--	--	

	Anjou pears				Strawberries 2/				Thompson seedless grapes				Wine			
	1998	1999	2000	2001	1998	1999	2000	2001	1998	1999	2000	2001	1998	1999	2000	2001
	--Dollars per pound--				--Dollars per 12-oz. pint--				--Dollars per pound--				--Dollars per liter--			
Jan.	0.863	0.923	1.017	0.945	2.135	--	2.167	--	1.815	2.341	2.450	2.126	5.302	5.287	5.458	5.630
Feb.	0.931	0.925	1.011	0.950	2.080	2.102	1.935	2.140	1.722	1.663	1.872	1.647	4.790	5.103	5.256	5.400
Mar.	0.878	0.942	1.003		1.751	1.960	1.825		1.579	1.613	1.663		5.306	5.262	5.471	
Apr.	0.918	0.953	1.015		1.613	1.751	1.450		1.516	2.262	1.746		4.764	5.129	5.156	
May	0.962	0.960	0.999		1.386	1.419	1.218		--	--	1.872		5.322	5.302	5.530	
June	0.996	0.913	0.871		1.413	1.490	1.187		1.651	1.864	1.359		4.808	5.093	5.273	
July	--	--	0.835		1.346	1.375	1.246		1.256	1.678	1.358		5.319	5.384	5.547	
Aug.	--	--	--		1.454	1.557	1.263		1.448	1.522	1.283		4.801	5.141	5.290	
Sep.	--	--	--		1.469	1.679	1.416		1.393	1.453	1.329		5.370	5.385	5.573	
Oct.	--	--	--		1.779	1.664	1.619		1.564	1.557	1.590		4.823	5.166	5.400	
Nov.	--	--	--		--	1.948	--		1.941	1.897	2.062		5.274	5.452	5.539	
Dec.	0.983	1.034	--		--	--	--		--	2.403	2.359		4.978	5.171	5.412	

-- = Insufficient marketing to establish price. 1/ Data converted from 12 fluid ounce containers. 2/ Dry pint.

Source: Bureau of Labor Statistics, U.S. Department of Labor.

Citrus Fruit Outlook

The current citrus crop is forecast to be almost a million tons smaller than last year's crop, although it is still larger than the 1998/99 crop. If realized, the 2000/01 crop of 16.5 million tons would be the second smallest in the last 5 years.

All the major citrus crops, except lemons, are expected to be smaller this year. The greatest decline is expected for the tangerine crop, which is forecast to be 16 percent below last year's record crop. Declines in crop size are predicted for the two largest producing States, Florida and California, but increases are expected in Texas and Arizona. Dry weather and freezing temperatures throughout much of Florida's citrus-growing season resulted in smaller sized fruit this year. The other three States report good size and quality citrus fruit. The improved size and quality of fresh-market citrus from the West Coast could help pull up navel prices at the end of their season, despite lower prices at the beginning of the season.

Orange Crop Expected To Be Smaller But Prices Weak

The 2000/01 orange crop is forecast to be 6 percent smaller than the previous crop. Crop size is estimated to be 12.4 million tons, 7.1 million tons of navel and other early- to mid-season orange varieties, and 5.3 million tons of Valencia, the late-season variety (table 3). California's navel production is expected to be 15 percent lower than a year earlier and its Valencia crop is expected to drop 7 percent. Florida's production is expected to drop 5 percent from the previous year's crop, with the greatest decline expected in the early- to mid-season crop. Drought conditions and cold weather in Florida throughout most of the growing season contributed to the reduction in its expected crop size. Both Arizona and Texas are expecting bigger orange crops this year. All of Arizona's increase is projected to be in the Valencia crop, with navels 14 percent down this year. Texas is expecting a larger early- to mid-season orange crop, up 23 percent, with the Valencia crop remaining unchanged at 8,000 short tons.

California's Crop Smaller but Quality Better in 2000/01

California's orange crop is projected to reach 2.2 million tons this year, 12 percent below the 1999/2000 crop. The smaller crop is partly a result of the greater quantity of fruit left on the trees from 1999/2000 while this year's crop was maturing. The Valencia crop is particularly affected by this situation. The fresh oranges stayed on the trees longer than usual last season because of slow movement in the marketplace. A positive side to the reduced number of fruit on trees this year is that fruit had a chance to get bigger. Plenty of rain this past winter also helped produce larger oranges. With the fruit larger this year, and the reported good quality of the fruit, growers should be looking at improved average navel prices over last year. Early in the season (November and December), navel orange prices have been running 5 percent lower than last year, but prices picked up in January

Table 3--Oranges: Utilized production, 1997/98-1999/2000 and indicated 2000/01 1/

Crop and State	Utilized			Forecast 2000/01	Utilized			Forecast 2000/01
	1997/98	1998/99	1999/2000	as of 3-2001	1997/98	1998/99	1999/2000	as of 3-2001
	--1,000 boxes 2/--				--1,000 short tons--			
Oranges:								
Early/mid season and navel 3/:								
Arizona	350	550	600	500	13	21	22	19
California	44,000	21,000	40,000	34,000	1,650	787	1,500	1,275
Florida	140,000	112,000	134,000	127,000	6,300	5,040	6,030	5,715
Texas	1,350	1,250	1,540	1,900	57	53	66	81
Total	185,700	134,800	176,140	163,400	8,020	5,901	7,618	7,090
Valencia:								
Arizona	650	600	500	550	25	22	19	21
California	25,000	15,000	27,000	25,000	938	563	1,013	938
Florida	104,000	74,000	99,000	96,000	4,680	3,330	4,455	4,320
Texas	175	180	200	200	7	8	8	8
Total	129,825	89,780	126,700	121,750	5,650	3,923	5,495	5,287
Total	315,525	224,580	302,840	285,150	13,670	9,824	13,113	12,377

1/ The crop year begins with bloom of the first year shown and ends with completion of harvest the following year.

2/ Net pounds per box: Arizona and California--75 lbs, Florida--90 lbs, and Texas--85 lbs.

3/ Navel and miscellaneous varieties in California and Arizona, and early- and mid-season (including Navel) varieties in Florida and Texas. Small quantity of tangerines also included in Texas.

Source: National Agricultural Statistics Service, USDA.

Table 4--All oranges: State average equivalent on-tree prices received by growers, 1997-2001

Month	Arizona					California				
	1997	1998	1999	2000	2001	1997	1998	1999	2000	2001
	--Dollars/75-lb box--					--Dollars/75-lb box--				
January	6.30	3.42	22.06	5.81	5.38	7.17	5.67	5.52	6.19	7.42
February	3.11	0.61	16.71	3.77	3.85	6.18	5.53	9.58	4.74	7.36
March	2.53	2.67	15.02	1.06		6.40	6.00	8.62	4.33	
April	3.56	3.56	16.58	2.86		7.38	8.72	12.76	3.82	
May	3.27	2.41	16.27	1.16		8.35	8.91	13.04	4.45	
June	0.12	3.82	13.70	0.19		5.93	8.38	12.16	5.21	
July	--	--	--	0.03		6.48	6.77	9.02	2.87	
August	--	--	--	--		7.45	5.56	7.06	2.17	
September	--	--	--	--		7.15	6.03	10.41	0.93	
October	-2.26	--	27.30	--		6.66	6.43	9.88	0.97	
November	3.85	13.35	9.23	4.08		7.60	11.08	10.07	5.32	
December	4.80	11.77	7.19	6.06		6.86	10.77	6.96	6.41	
	Florida					Texas				
	1997	1998	1999	2000	2001	1997	1998	1999	2000	2001
	--Dollars/90-lb box--					--Dollars/85-lb box--				
January	3.17	2.84	4.39	3.24	2.41	2.12	1.18	6.74	2.75	0.48
February	3.18	3.17	4.54	3.25	2.62	3.93	1.66	8.38	2.51	0.13
March	4.00	4.78	5.47	3.71		4.74	3.74	3.89	2.58	
April	4.15	4.89	5.50	4.49		4.95	2.58	5.13	2.57	
May	4.11	5.10	5.70	4.74		4.66	3.00	5.38	2.15	
June	4.21	5.26	6.43	4.61		--	--	--	--	
July	--	--	--	4.02		--	--	--	--	
August	--	--	--	--		--	--	--	--	
September	--	--	--	--		--	--	--	--	
October	3.25	5.87	--	--		7.18	6.12	9.53	5.39	
November	2.50	4.16	3.17	2.62		3.05	6.88	7.31	2.21	
December	2.66	4.21	3.10	2.40		1.88	6.26	5.16	1.76	

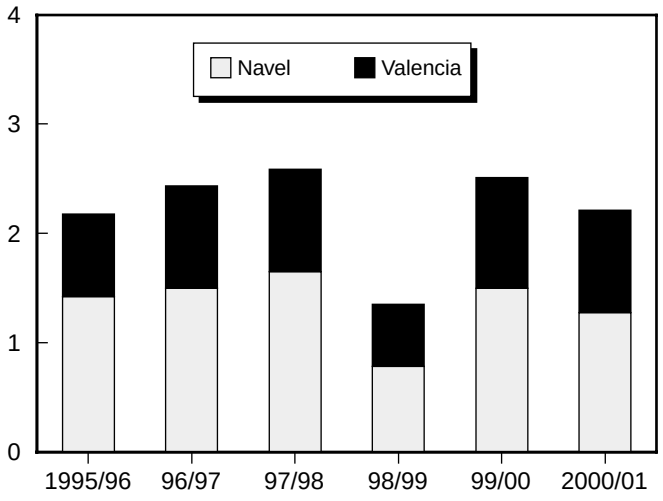
-- = Not available.

Source: National Agricultural Statistics Service, USDA.

Figure 3

Utilized orange production in California

Mil. short tons



Source: National Agricultural Statistics Service, USDA.

and February and should remain strong through early spring when the navel crop is replaced by the Valencia crop.

The Valencia orange crop is forecast to reach 938,000 tons in 2000/01, 7 percent below a year ago, but higher than the freeze-reduced crop 2 years ago. The smaller crop should help California growers move their fruit. Last year demand was weak for fresh-market Valencias. The Valencia oranges compete with all the summer fruit in the markets, including the more desirable navel oranges imported from the Southern Hemisphere during the summer months. The weak demand lowered average grower prices from $10 per 75-lb box during March through December 1998/99 to $3.65 per box for the same period in 1999/2000, a 64-percent decline. With the smaller crop this year, supply may be more in line with demand and grower prices should improve.

Fresh orange exports are up this marketing year (November-December), increasing 64 percent over the same period a year ago. Exports increased to all major markets, with Asian markets strong. Canada remains the major market for U.S. fresh oranges, although its share of total exports fell from 44 percent in 1999/2000 to 34 percent during the first 2

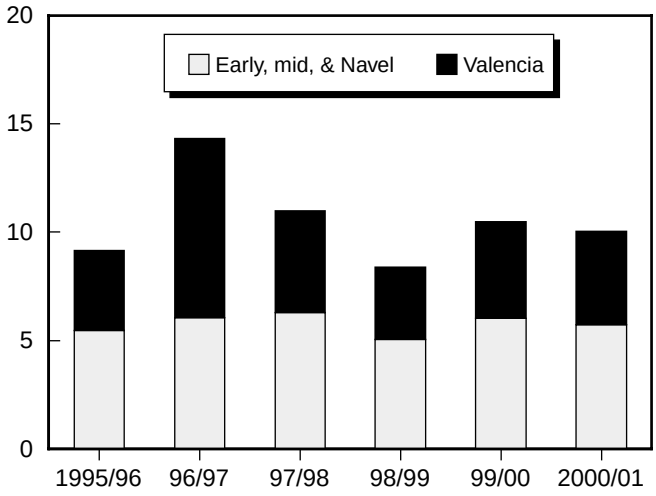
months. Japan, so far this year, accounted for 13 percent of the international market, declining from 18 percent last year. Exports increased considerably to other Asian markets, Singapore, Malaysia, South Korea, the Philippines, and Vietnam. Since China's market opened last year for U.S. citrus, their share of the market rose from about 1 percent to 7 percent so far this year. If Hong Kong's imports are included with China's (since much of the shipments to Hong Kong are transshipped to the mainland), this area accounted for almost 30 percent of U.S. shipments in November and December and makes it the second most important market for U.S. fresh oranges after Canada. With China's market still in its infancy and a strong demand for American products in China, the future looks good for U.S. orange exports to China.

Fresh orange imports declined 55 percent in 2000 compared with 1999. Imports were down from Mexico, Spain, the Caribbean, Israel, and Morocco. Shipments from these countries, which produce oranges during the same season as the United States, were high during the early months of 1999 to compensate for the short California crop in 1998/99. Since California's crop improved in 1999/2000, there was less demand for these imports. Despite the reduced demand for imports in 2000, however, shipments from the European Union, Israel, Turkey, and Morocco were substantially above levels from 2 years ago. The United States is a highly desirable market for much of the world, and it appears that since these countries have made inroads into the U.S. markets, their presence is growing. Also increasing their presence in the U.S. market for fresh oranges are Southern Hemisphere countries that can produce the more desirable navel orange at a time when they are not produced in the United States. Australia leads as a major source of navels during our summer months, however South Africa is quickly becoming a major competitor, as is Argentina. The presence of the navel oranges in the U.S. marketplace during the summer of the 1999/2000 season was an important factor contributing to the slow movement of Valencia oranges from California and Arizona, according to industry sources. As a result, a larger than normal quantity of fruit remained on the trees later than they usually do, affecting the size of this year's crop.

Weather Factors Hamper Florida's Crop

Florida's orange production is expected to be 4 percent below a year ago. Lack of rain and cold temperatures for much of the season caused fruit size to be below average. This year's drought has had a greater impact on Florida's orange production than a freeze early in January. The colder weather in Florida around the time of the freeze prevented a shock to the fruit and trees and minimized the potential damage than would normally occur. Growers also were irrigating extensively due to the drought, and irrigation helped warm up the groves and protect the fruit. The freeze may result in increased fruit droppage which would affect the Valencia

Figure 4
Utilized orange production in Florida



Source: National Agricultural Statistics Service, USDA.

crop more than the early- to mid-season oranges which have been mostly harvested. By the end of February less than 4 percent of the early- to mid-season crop remained to be harvested. Valencia harvesting had only just begun a few weeks prior. Fruit movement was above last year but similar to 2 years ago when the crop was 20 percent smaller. About 4 percent of the crop went to fresh use, similar to previous years. The remainder of the fruit went to juice.

Orange juice production is forecast at 1.4 million single-strength equivalent (sse) gallons, down 4 percent from last year but 16 percent above 2 years ago (table 5). Juice-yield projections in February rose to 1.58 gallons per box, up from 1.55 gallons in 1999/2000. Despite the expected smaller level of production in 2000/01, juice supplies are predicted to be up 1 percent from last year. Record-large beginning stocks in October, the beginning of the new marketing year, coupled with an expected increase in imports without much change forecast in exports, resulted in the U.S. Department of Agriculture (USDA) projection for orange juice supplies to total 2.4 billion sse gallons. According to industry data, movement has been strong so far this year, especially for chilled orange juice. As of mid-February, chilled juice movement was up 18 percent from last year, and 16 percent above 2 years ago. The strongest movement has been in bulk sales, with the share of bulk sales of chilled juice usage increasing relative to retail sales over the past few years. Frozen concentrated orange juice (FCOJ) movement is up slightly from last year, but was slow compared with 1998/99. Orange juice consumption is expected to be up this year due to the larger supply and movement from a year ago. For the 2000/01 marketing year, annual per capita consumption is estimated to be 6.01 gallons, 2 percent higher than a year ago.

Table 5--United States: Orange juice supply and utilization, 1987/88-2000/01

Season 1/	Beginning stocks	Production	Imports	Exports	Domestic consumption	Ending stocks 2/
			Million SSE gallons 3/			
1987/88	201	907	416	90	1,223	212
1988/89	212	970	383	73	1,258	233
1989/90	233	652	492	90	1,062	225
1990/91	225	876	327	96	1,174	158
1991/92	158	930	286	108	1,097	170
1992/93	170	1,207	326	114	1,339	249
1993/94	249	1,133	403	106	1,319	360
1994/95	360	1,257	198	117	1,415	283
1995/96	356	1,271	261	119	1,358	411
1996/97	411	1,437	257	148	1,454	502
1997/98	502	1,555	305	148	1,680	533
1998/99	533	1,236	346	150	1,438	527
1999/00	527	1,496	338	141	1,617	603
2000/01 f	603	1,429	358	146	1,664	580

f=Forecast

1/ Season begins in December of the first year shown until 1998/99. Since 1999/2000, the marketing year has been changed to begin in October.

2/ Data may not add due to rounding. Beginning with 1994/95 ending stocks, stock data include chilled as well as canned and frozen concentrate juice.

3/ SSE = single-strength equivalent. To convert to metric tons at 65 degrees brix, divide by 1,405.88.

Sources: Economic Research Service and Foreign Agricultural Service, USDA.

Florida's Department of Citrus estimated in October that 59 percent of fruit would go into making FCOJ this marketing year (table 6). While the portion of the crop going to FCOJ would be 8 percent higher than last year, the actual number of boxes would be 4 percent fewer than last year due to the smaller crop.

Demand for fruit by processors should increase as harvesting of the Valencia crop picks up. The USDA's forecast for juice yields from Valencia oranges is 1.65 gallons per box as of March. The strong demand for the small crop should push prices up, benefiting growers. Prices have been low in the beginning of the season as processors try to reduce stocks (table 7). With juice demand above a year ago, however, the demand for fruit should grow, driving up prices.

Orange juice exports are down for the first 2 months of the marketing season (October-December). Exports to Canada and Belgium, the two major export markets for U.S. orange juice, have been higher than a year ago to date, however, they are down to the Netherlands, Japan, and South Korea, also important markets. A decline in FCOJ exports accounted for the decline. Exports of chilled juice have been running about 13 percent above a year ago to date, with a growth rate of 12 percent a year since 1996 during the October-December period. Canada is the largest market for chilled orange juice. Most of the rest of the shipments go to the European Union by way of Belgium.

Table 6--Oranges used for frozen concentrate, Florida, 1990/91-2000/01

Season	Orange and Temple production	Used for frozen concentrate		Yield per box
	--Million boxes 1/--		Percent	Gallons 2/
1990/91	154.1	100.4	65.2	1.45
1991/92	142.2	90.6	63.7	1.55
1992/93	189.1	128.3	67.8	1.58
1993/94	176.7	111.7	63.2	1.57
1994/95	208.1	140.8	67.7	1.50
1995/96	205.5	129.3	62.9	1.52
1996/97	228.6	147.9	64.7	1.57
1997/98	246.3	156.4	63.5	1.58
1998/99	187.8	93.7	49.9	1.63
1999/00	235.0	129.5	55.1	1.55
2000/01 3/	224.7	133.5	59.4	1.58

1/ Picking boxes weigh approximately 90 pounds.

2/ Gallons per box at 42-degrees-brix equivalent.

3/ Forecast, March 2001

Sources: National Agricultural Statistics Service, USDA, and the Florida Department of Citrus.

Table 7--Processing oranges: Average equivalent on-tree prices received by growers, Florida, 1996-2001

Month	1996	1997	1998	1999	2000	2001
			--Dollars/90-lb box--			
Jan.	3.70	3.19	2.85	4.26	3.24	2.40
Feb.	3.89	3.15	3.19	4.39	3.28	2.60
Mar.	5.18	3.99	4.80	5.29	3.67	
Apr.	5.47	4.17	4.93	5.33	4.50	
May	5.77	4.11	5.13	5.45	4.75	
June	6.07	4.02	5.18	5.45	4.55	
July	--	--	--	--	3.80	
Aug.	--	--	--	--	--	
Sep.	--	--	--	--	--	
Oct.	--	2.03	3.27	--	--	
Nov.	2.86	2.44	3.70	1.99	2.45	
Dec.	3.10	2.62	3.93	2.99	2.30	

-- = Not available.

Source: National Agricultural Statistics Service, USDA.

Imports are down 21 percent so far in 2000/01 over a year ago (October through December). Shipments from Brazil were 37 percent lower than a year ago. The large stocks coming into this year, along with fruit maturing earlier this year than last, reduced the demand for imported juice. To help compensate for some of the decline in Brazilian juice, imports from Mexico grew 8 percent from the same period last year, increasing Mexico's share of total imports.

Brazil's orange juice production is forecast to be 19 percent below a year earlier (table 8). The drop in production is expected because below-average rainfall resulted in smaller size fruit this year. The large beginning stocks, however, helped buffer supplies. Even so, availability this year is expected to be down about 13 percent. The anticipated reduced supplies lowered the export forecast to 1.6 billion sse gallons, 10 percent lower than last year. Despite the lower availability of juice, FCOJ market prices dropped this

Table 8--Brazilian FCOJ production and utilization, 1992-2000

Season 1/	Beginning stocks	Production	Domestic consumption	Exports	Ending stocks 2/
	Million SSE gallons 3/				
1992	96	1,610	25	1,532	148
1993	148	1,572	25	1,546	148
1994	148	1,583	31	1,482	218
1995	218	1,525	25	1,476	242
1996	242	1,620	24	1,660	177
1997	177	1,954	22	1,778	331
1998	331	1,665	26	1,586	370
1999	370	1,912	22	1,821	439
2000	439	1,555	25	1,625	343

1/ Season begins in July.

2/ Data may not add due to rounding.

3/ SSE = single-strength equivalent. To convert to metric tons at 65 degrees brix, divide by 1.40588

Source: Foreign Agricultural Service, USDA.

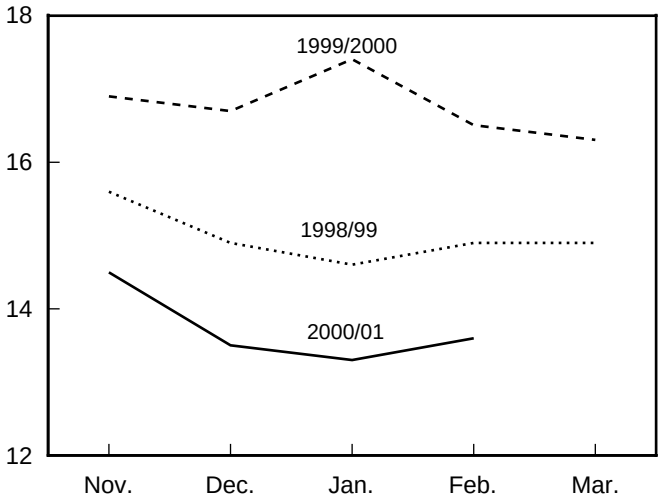
year, according to USDA's Foreign Agriculture Service. The price decline was attributed to processors attempting to gain market share. The drop in prices could have an adverse affect on U.S. growers as well as Brazilian growers because of the lower price of Brazilian juice imported into the U.S. market and because of lower world prices. More than three-quarters of Brazilian orange juice exports were shipped to the European Union during the first half of the marketing year; 11 percent was shipped to the United States.

Grapefruit Production and Prices Lower in 2000/01

The U.S. grapefruit crop is forecast at 2.6 million tons, 6 percent smaller than 1999/2000, but still larger than the two previous seasons (table 9). The Florida crop, which accounts for 80 percent of U.S. production, is expected to decline 8 percent. The cool, dry winter in Florida this year limited

Figure 5

F.o.b. grapefruit prices



Source: National Agricultural Statistics Service, USDA.

growth. Fruit size is the third smallest in the last 10 years. The small size and lagging maturity levels of the fruit have slowed utilization through February. While March is the time of year when grapefruit are usually processed, processors have been holding off on harvesting, until the solids-to-acid ratio increases, producing sweeter fruit. This year, 60 percent of the crop remained to be harvested by mid-February, compared with 56 percent of the crop remaining at the same time last year, and 43 percent remaining in 1998/99.

Texas, Arizona, and California are all expecting to have bigger grapefruit crops this year over a year ago. Texas, the second largest grapefruit producer, is projected to have a 10-percent larger crop in 2000/01. The color, sweetness, and

Table 9--Grapefruit: Utilized production, 1997/98-1999/2000 and indicated 2000/01 1/

Crop and State	Utilized			Forecast 2000/01	Utilized			Forecast 2000/01
	1997/98	1998/99	1999/2000	as of 3-2001	1997/98	1998/99	1999/2000	as of 3-2001
	--1,000 boxes 2/--				--1,000 short tons--			
Florida, all	49,550	47,050	53,400	49,000	2,106	2,000	2,269	2,083
Seedless	30,600	28,700	31,900	29,000	1,301	1,220	1,356	1,233
Colored	18,950	18,350	21,500	20,000	805	780	913	850
Arizona	800	750	500	600	27	25	17	20
California	8,000	7,300	7,000	7,200	268	244	235	241
Texas	4,800	6,100	5,930	6,500	192	244	237	260
Total	63,150	61,200	66,830	63,300	2,593	2,513	2,758	2,604

1/ The crop year begins with bloom of the first year shown and ends with completion of harvest the following year.

2/ Net pounds per box: California and Arizona-67, Florida-85, and Texas-80.

Source: National Agricultural Statistics Service, USDA.

overall quality of the fruit are reported to be excellent. California's crop is projected to be 3-percent larger than in 1999/2000, and Arizona's crop 18 percent larger. Both States report good fruit quality, which should help prices during the late spring and summer when most of their fruit is marketed.

Grower prices in Florida have fallen after 2 years of increasing prices (table 10). Weak demand in both the fresh market and by processors have brought prices down. Between September and February, grower prices for all Florida grapefruit dropped 50 percent from the same period. They were 47 percent lower for fresh grapefruit and 117 percent lower for processing grapefruit. Fresh grapefruit prices were also lower than last year for Texas and California. In Texas, prices ranged from a high of $5.55 per 85-lb box in November to a low of $2.35 per box in February. Last year, $5.55 per box was the low price during this time and the high was $13.45 in October 1999. Only Arizona growers have received higher prices for their grapefruit this year.

While processors have been slow to harvest grapefruit due to maturity, demand by the industry is also weaker this year as a result of large juice beginning stocks for the 2000/01 season. Stocks for frozen concentrated grapefruit juice had declined by mid-February relative to a year ago, but movement is slow relative to last year. Chilled grapefruit juice movement has also been lower this season. According to ACNeilsen Scantrack, retail sales of grapefruit juice were down during September to February, however, prices averaged higher. Sales of not-from-concentrate grapefruit juice were 11 percent lower than September through mid-February, however, retail prices averaged 1 percent lower. Reconstituted juice sales were running 28 percent behind a year ago, but prices were 12 percent above the same period. Similarly, frozen juice sales were down 32 percent, with prices up 17 percent.

Fresh grapefruit exports rose 1 percent from September through December 2000 over the same period the previous year. Exports to Japan were up 2 percent, accounting for 38 percent of the shipments, but down 9 percent to Canada. The slightly stronger Euro, from a year ago, improved trade with the European Union, which accounted for 40 percent of grapefruit exports to date. The largest shipments went to France, the Netherlands, Germany, and the United

Table 10--Grapefruit: Monthly equivalent on-tree prices received by growers, 1997-2001

	Florida															
	All					Fresh market					Processing					
Month	1997	1998	1999	2000	2001	1997	1998	1999	2000	2001	1997	1998	1999	2000	2001	
	--Dollars/85-lb box--					--Dollars/85-lb box--					--Dollars/85-lb box--					
Jan.	1.99	1.53	2.41	4.95	1.64	3.75	3.27	4.39	7.54	2.93	-0.06	-0.29	0.31	2.87	0.18	
Feb.	1.52	1.19	2.09	4.31	2.01	3.29	3.46	4.88	6.62	3.48	0.09	-0.13	0.43	2.87	1.01	
Mar.	1.05	0.70	1.88	3.79		3.88	3.11	5.07	6.34		0.07	-0.30	0.49	3.00		
Apr.	0.90	0.65	2.14	3.32		3.24	2.97	5.43	5.76		-0.02	-0.40	0.70	2.80		
May	0.53	0.34	2.19	2.61		1.92	2.29	6.92	4.29		-0.05	-0.40	0.61	2.30		
June	1.42	--	--	1.37		2.16	--	--	4.22		0.40	--	--	0.20		
July	--	--	--	--		--	--	--	--		--	--	--	--		
Aug.	--	--	--	--		--	--	--	--		--	--	--	--		
Sep.	--	--	--	--		--	--	--	--		--	--	--	--		
Oct.	3.65	4.59	6.87	4.17		4.57	6.20	9.27	5.41		-0.31	0.49	-0.37	-1.73		
Nov.	1.93	2.94	4.30	2.69		3.36	4.89	6.11	4.13		-0.71	-0.96	0.83	-0.62		
Dec.	2.10	2.36	4.79	2.03		3.77	4.22	6.63	3.31		-0.59	-0.10	2.42	-0.29		

	Fresh-Arizona					Fresh-California					Fresh-Texas				
	1997	1998	1999	2000	2001	1997	1998	1999	2000	2001	1997	1998	1999	2000	2001
	--Dollars/67-lb box--					--Dollars/67-lb box--					--Dollars/80-lb box--				
Jan.	2.92	2.62	4.02	4.12	4.92	8.62	7.32	13.62	11.12	10.62	3.75	3.85	5.55	6.85	2.75
Feb.	3.72	3.82	3.92	4.02	5.02	6.32	5.22	9.82	9.22	8.82	2.95	4.85	5.25	5.55	2.35
Mar.	2.50	3.82	4.92	4.92		5.02	5.82	7.52	7.32		3.25	4.25	4.25	6.35	
Apr.	3.92	4.22	5.52	5.02		4.92	6.82	6.82	5.62		3.35	4.75	5.05	5.95	
May	4.12	5.92	7.72	4.92		5.52	8.32	10.92	6.82		3.35	4.75	6.05	5.95	
June	3.82	7.82	8.32	5.12		7.22	9.22	13.22	5.82		--	--	--	--	
July	2.42	7.52	7.82	5.42		7.32	10.52	11.42	7.92		--	--	--	--	
Aug.	--	--	--	--		6.52	12.52	7.82	8.42		--	--	--	--	
Sep.	--	--	--	--		6.52	16.82	4.82	8.02		--	--	--	--	
Oct.	--	--	--	--		4.72	16.82	8.12	8.72		6.45	14.05	13.45	5.35	
Nov.	1.72	--	--	--		5.02	14.32	9.92	10.22		5.55	9.05	10.55	5.55	
Dec.	2.72	5.22	5.12	5.72		7.52	13.22	11.72	10.02		4.65	8.05	6.95	3.15	

-- = Not available.

Source: National Agricultural Statistics Service, USDA.

Kingdom. Shipments to China, the newest market for U.S. fresh grapefruit, is still in its infancy and accounts for 1 percent of exports, the same as last year. Since grapefruit are not as familiar as oranges in China, it may take a few years before this market shows much growth.

Large Lemon Crop Brings Down Prices

The 2000/01 lemon crop is estimated to total 927,000 tons, the largest crop since 1996/97. If realized, the crop will be 7 percent bigger than last year (table 11). Both California and Arizona are expecting larger crops. California's crop accounts for 86 percent of total production. Fruit quality is reported high with good size and color. The high quality of this year's crop could act as a moderating factor for prices this year.

California prices this marketing year (August through February) have averaged $6.62 a 76-pound box, ranging from a high of $16.52 in August to $1.39 in February (table 12). Prices are averaging lower than the last several years, and are 57 percent below a year ago when they were high because of the previous year's freeze. Arizona's prices have averaged $7.54 per box from August through February, 42 percent below the same period the previous marketing year. While the high quality of the fruit is a plus in marketing, the large crop will make it difficult to move the fruit at prices seen the last several years.

Lemon exports have been running 5 percent above a year ago for August through December. Exports are sluggish to Japan, a market that accounts for 62 percent of U.S. lemon imports. Shipments to Canada, with its 22 percent share, increased 10 percent over the previous year. Exports to South Korea and Hong Kong, which together account for 11 percent of the market also increased this year. China remains a very small market, with exports down slightly this year over last year.

Lemon imports increased 23 percent in 2000 over 1999. Argentina was given approval by USDA's Animal and Plant Health Inspection Service to ship to specific States beginning in 2000. Within the year, Argentina's share of U.S. lemon imports rose from 0 to 27 percent. Imports from Spain, the number one supplier for imported lemons in the U.S. market, increased 3 percent in 2000. Chilean imports, which slipped from its number one place to Spain in 1998, fell 13 percent. Much of the Chilean decline last year could be attributed to the introduction of Argentina into the U.S. market. Both countries are in the Southern Hemisphere and their fruit enter the U.S. market during the summer months. The summer is the biggest market for lemons in the United States. U.S. producers look to the summer months to sell most of their crop. With the presence of Chilean and especially Argentine lemons also in the U.S. market competing for market share, U.S. producers may have more difficulties selling their crop this year. Prices can be expected to be

Table 11--Lemons: Utilized production, 1997/98-1999/2000 and forecast for 2000/01 1/

Crop and State	Utilized			Forecast 2000/01	Utilized			Forecast 2000/01
	1997/98	1998/99	1999/2000	as of 3-2001	1997/98	1998/99	1999/2000	as of 3-2001
	--1,000 boxes 2/--				--1,000 short tons--			
Arizona	2,600	3,450	3,100	3,400	99	131	118	129
California	21,000	16,200	19,600	21,000	798	616	745	798
Total	23,600	19,650	22,700	24,400	897	747	863	927

1/ The crop year begins with bloom of the first year shown and ends with completion of harvest the following year.

Source: National Agricultural Statistics Service, USDA.

Table 12--All lemons: State-average equivalent on-tree prices received by growers, 1997-2001

Month	Arizona					California				
	1997	1998	1999	2000	2001	1997	1998	1999	2000	2001
	--Dollars/76-lb box--									
Jan.	4.15	1.75	8.43	7.65	3.04	4.34	2.04	8.00	13.54	3.48
Feb.	2.48	0.96	4.18	5.43	1.26	1.83	1.78	5.57	11.59	1.39
Mar.	1.28	0.86	1.73	4.34		1.98	1.74	5.98	10.34	
Apr.	--	0.25	1.75	2.26		5.28	2.84	6.75	6.53	
May	--	--	--	--		15.34	6.88	8.59	4.48	
June	--	--	--	--		25.14	16.45	10.76	7.92	
July	--	--	--	--		29.44	23.33	14.48	12.62	
Aug.	--	--	--	--		23.66	23.90	18.35	16.52	
Sep.	37.20	23.78	25.33	15.90		18.60	18.32	21.10	10.75	
Oct.	13.85	23.91	19.72	14.56		10.58	20.30	16.33	6.91	
Nov.	4.12	12.49	9.85	5.67		4.70	12.95	13.06	2.40	
Dec.	2.42	7.23	10.25	4.78		2.95	7.51	13.81	4.88	

-- = Not available.

Source: National Agricultural Statistics Service, USDA.

below last year as these countries compete over market share. Sunkist marketed Argentine lemons their first year in the U.S. market, but has stated that it will not do so again this year. This might put a slight damper on Argentine sales as they work to create new marketing channels.

Smaller Specialty Citrus Crops Expected in 2000/01

Tangerine, Temple, and tangelo production are projected to be lower in 2000/01 than the previous season. The tangerine crop, the largest of the specialty citrus crops, is expected to be 16 percent smaller than last season's record-large crop. It is expected, however, to be larger than the crops for the two seasons prior. Florida's production, the largest in the country, is projected to decline 20 percent to 266,000 tons. Projected declines are smaller in California, with a 3-percent smaller crop and Arizona with a 6-percent smaller crop than a year ago. Despite the drought in Florida, fruit size was good for the early tangerines. The later crop of Honey tangerines, however, may not turn out to be as large as was originally expected. By mid-February, harvesting of early tangerines, Robinson, Fallglo, Sunburst, and Dancy, was completed. Honey tangerine harvest was about half completed, running ahead of last year, but on par with 2 years ago. All tangerine prices have been averaging $8.87 a box during October through February, 9 percent above a year ago. Tangerine prices should stay strong for the remainder of the season, as imports decline in the marketplace.

Clementine imports continue to grow during the 2000/01 marketing year. Between October and December this year, clementine imports increased 9 percent. The increase in shipments between 1999 and 2000 was the smallest in the last 5 years. Between 1996 and 1997 and again between 1998 and 1999 imports increased 107 percent. Part of the increase in clementine imports between October and December 1998 and 1999 could be attributed to the small supply of U.S. oranges due to the California freeze in 1998/99. Also contributing to the large increase in imports was the expansion of the clementine market to new regions of the United States beyond the original market in the Northeast. Shipments from Spain account for 98 percent of the imports this year. The more modest growth of clementine imports this year is likely due to Spain's expected smaller production. Despite the smaller crop, Spain's citrus exporters sponsored promotion programs in seven U.S. cities, hoping to expand their presence further in U.S. markets.

Table 13-Other citrus: Utilized production, 1997/98-1999/2000 and forecast for 2000/01 1/

Crop and State	Utilized			Forecast 2000/01	Utilized			Forecast 2000/01
	1997/98	1998/99	1999/2000	as of 3-2001	1997/98	1998/99	1999/2000	as of 3-2001
	--1,000 boxes 2/--				--1,000 short tons--			
Tangelos:								
Florida	2,850	2,550	2,200	2,100	128	115	99	95
Tangerines:								
Arizona	600	950	850	800	23	36	32	30
California	2,400	1,500	2,300	2,200	90	56	86	83
Florida	5,200	4,950	7,000	5,600	247	235	333	266
Total	8,200	7,400	10,150	8,600	360	327	451	379
Temples:								
Florida	2,250	1,800	1,950	1,700	101	81	88	77

1/ The crop year begins with bloom of the first year shown and ends with completion of harvest the following year.

2/ Net pound per box: tangerines--California and Arizona--75; Florida--95; tangelos--90; Temples--90.

Source: National Agricultural Statistics Service, USDA.

Noncitrus Fruit Outlook

2000 Noncitrus Production Increases From Previous Year

The 2000 utilized production of noncitrus fruit was estimated at about 18.2 million short tons, up 5 percent from 1999 (table 14). Many fruit orchards and vineyards in California and Washington, two major noncitrus fruit producing States, experienced generally favorable weather conditions during 2000 that have been conducive to large or higher production. The good performance of many of the fruit crops in these two States balanced out production declines brought by weather problems in other regions. U.S. utilized production increased for grapes, peaches, strawberries, prunes and plums, blackberries, blueberries, raspberries, tart cherries, California figs and kiwifruit, and Hawaiian bananas, papayas, and pineapples.

The preliminary estimate of the value of noncitrus fruit production for 2000 was a record $8.1 billion, up less than 1 percent from the previous year (table 14). Much of the increase came from a 17-percent larger grape crop (the most valuable noncitrus crop in the United States) which more than offset the decrease in prices for a net increase of 5 percent in total crop value. Similarly, production increases were also significant enough to compensate price declines for wild blueberries, Oregon raspberries, and Hawaiian papayas and pineapples. Conversely, increased prices more than offset production decreases for an overall increase in the value of production for apples, the second most valuable noncitrus crop in the United States. Meanwhile, higher prices and increased production raised the value of production for peaches, prunes and plums, and California figs and raspberries.

Plenty of Fresh-Market Apples in 2000/01, Prices Averaging Lower

USDA's National Agricultural Statistics Service (NASS) will report its final estimate of 2000 fresh-market apple production in the United States on July 6, 2001. Based on USDA's January 2001 preliminary estimates, total U.S. apple production for 2000 is 10.6 billion pounds, down less

Table 14--Utilized production and value of noncitrus fruit, United States, 1998-2000

	Utilized production			Value of utilized production		
Crop	1998	1999	2000	1998	1999	2000
	--1,000 short tons--			--1,000 dollars--		
Apples	5,381.3	5,223.3	5,167.4	1,316,172	1,552,615	1,553,536
Apricots	108.1	90.5	88.8	35,358	35,377	31,579
Avocados	159.3	183.3	3/ 236.5	343,730	375,716	6/
Bananas, Hawaii	10.5	12.3	14.3	7,350	8,575	9,975
Berries 1/	175.2	198.1	228.9	221,537	315,808	327,522
Cherries, sweet	208.4	227.8	214.9	226,236	248,493	286,774
Cherries, tart	152.8	127.1	140.7	44,186	55,505	52,753
Cranberries	272.2	316.7	264.4	199,113	112,235	4/ 6/
Dates, California	24.9	22.2	19.9	30,378	27,528	24,875
Figs, California	51.3	45.2	49.0	11,611	12,330	13,770
Grapes	5,816.4	6,234.8	7,314.6	2,640,470	2,926,759	3,063,918
Guavas, Hawaii	7.3	5.4	3/ 6.4	1,781	974	6/
Kiwifruit, California	33.0	24.0	31.0	24,544	15,215	6/
Nectarines, California	224.0	274.0	266.0	105,466	112,497	105,849
Olives, California	90.0	142.0	53.0	41,331	56,567	33,903
Papayas, Hawaii	20.0	21.2	26.5	12,589	15,929	17,319
Peaches	1,162.8	1,216.7	1,259.9	446,534	462,836	495,067
Pears	967.8	1,013.4	957.2	281,611	298,009	255,354
Pineapples, Hawaii	332.0	352.0	354.0	92,776	101,448	101,530
Plums, California	188.0	196.0	196.0	99,388	82,041	86,669
Prunes, California	329.6	478.5	624.9	78,692	147,180	6/
Plums & prunes 2/	24.8	21.6	22.0	7,707	4,500	4,907
Strawberries	819.9	905.2	923.8	1,001,854	1,105,513	1,013,537
Total	16,559.6	17,331.3	5/ 18,460.1	7,270,414	8,073,650	8,146,287

1/ Berries include cultivated and wild blueberries, cultivated blackberries, boysenberries, loganberries, black and red raspberries, and all California raspberries. 2/ Idaho, Michigan, Oregon, and Washington. 3/ NASS data available on July 6, 2001. The avocado production for 2000 is based on estimates from the California Avocado Commission, Florida Agricultural Statistics Service, and ERS. The guava production estimate is an average of 1998-99 production. 4/ Data available August 21, 2001. 5/ Total estimates based on estimates for avocado and guava production. 6/ Uses 2000 production and 1999 prices to compute estimated value of 2000 crop of cranberries, kiwifruit, and California prunes. Avocado and guava value estimate uses 1999 value.

Source: National Agricultural Statistics Service, USDA.

than 1 percent from a year earlier (table 15). The average price for apples received by U.S. growers in 2000 was $300 per ton, about unchanged from a year ago. Although down by a fraction, apple production remained large—averaging 1 percent less than the previous 5-year average. A record-large apple crop was harvested in 1998, totaling 11.6 billion pounds. Total bearing acreage declined 2 percent in 2000, but per-acre yields averaged higher, particularly in the Western States, narrowing the difference in crop size between last year and the year before.

Large production declines in the Eastern and Central States more than offset a 12-percent increase in total output for the Western States. Most apple-producing States in the Eastern and Central United States, including all major producers such as New York, Pennsylvania, Virginia, and Michigan, experienced significant production declines. In Washington, the largest producer of apples in the United States, apple production increased 14 percent, from 2.5 million tons to nearly 2.9 million tons. Favorable weather contributed to increased production in Washington and most Western States. Meanwhile, a combination of factors such as freeze

Table 15--Apples, commercial crop 1/: Total production and season-average prices received by growers, 1998-2000

State and area	Production 2/			Price per short ton		
	1998	1999	2000	1998	1999	2000
	--1,000 short tons--			--Dollars--		
EASTERN STATES:						
Connecticut	8.8	11.5	10.5	670	552	584
Georgia	5.5	6.0	7.0	322	348	376
Maine	22.3	36.0	17.5	436	404	456
Maryland	17.3	19.0	15.4	356	188	302
Massachusetts	16.0	32.5	24.5	614	536	590
New Hampshire	9.5	21.8	18.3	558	430	510
New Jersey	27.5	25.0	27.5	244	256	256
New York	535.0	630.0	525.0	228	228	268
North Carolina	92.5	95.0	100.0	222	302	254
Pennsylvania	197.5	252.5	241.0	278	218	292
Rhode Island	1.3	1.8	1.1	608	744	790
South Carolina	22.5	16.0	10.0	394	274	258
Vermont	17.5	28.5	20.0	434	410	446
Virginia	140.0	180.0	170.0	234	218	220
West Virginia	55.0	70.0	45.0	180	186	204
Total	1,168.1	1,425.6	1,232.7			
CENTRAL STATES:						
Arkansas	2.3	2.7	3.6	454	476	504
Illinois	22.5	29.3	21.3	372	428	568
Indiana	27.0	30.2	22.5	484	468	458
Iowa	4.4	5.5	3.8	572	638	666
Kansas	0.8	3.6	1.5	512	554	536
Kentucky	5.5	4.5	3.4	568	586	518
Michigan	500.0	600.0	425.0	174	176	192
Minnesota	11.9	11.5	11.0	888	828	856
Missouri	17.0	24.5	19.0	344	348	370
Ohio	40.0	50.0	47.5	410	438	468
Tennessee	6.3	4.8	4.8	444	422	492
Wisconsin	38.1	38.7	35.5	556	562	598
Total	675.6	805.2	598.8			
WESTERN STATES:						
Arizona	23.0	17.2	47.5	294	254	144
California	430.0	448.0	365.0	306	292	272
Colorado	32.5	4.0	16.0	238	436	350
Idaho	77.5	35.0	75.0	170	342	250
New Mexico	4.0	1.0	4.0	420	500	508
Oregon	90.0	75.0	87.5	282	218	214
Utah	22.5	4.5	22.5	290	438	398
Washington	3,300.0	2,500.0	2,850.0	230	342	322
Total	3,979.5	3,084.7	3,467.5			
United States	5,823.2	5,315.4	5,299.0	244	298	300

1/ In orchards of 100-or-more bearing-age trees. 2/ Includes unharvested production and harvested not sold.

Source: National Agricultural Statistics Service; converted to short tons by the Economic Research Service, USDA.

damage, poor pollination conditions, hail, and fire-blight problems has resulted in much smaller crops in the other growing regions.

Because more than half of the Nation's fresh-market apples are grown in Washington, the larger crop there will likely contribute to increased fresh-market supplies in the United States during 2000/01 compared with the previous year. Consequently, prices for fresh-market apples will likely average lower than a year ago. Prices received by growers for fresh-market apples during 2000/01 thus far (August-February) averaged $379 per ton, down from $387 per ton the same period a year ago. Following the trend in grower prices, retail prices for Red Delicious apples, the most predominant variety produced in Washington, also averaged lower, at $0.88 per pound from August through December 2000, compared with $0.93 per pound the same period in 1999. USDA reports fresh apple stocks in cold storage as of February 1, 2001, were up 2 percent from the same time last year, totaling 4.1 billion pounds. Of this total, 87 percent were in controlled atmosphere storage and the remainder in regular cold storage. Stocks in controlled atmosphere storage were up 4 percent, while those in regular storage were down 9 percent.

According to the U.S. Apple Association, total movement of fresh-market apples as of February 2001 was 1 percent ahead of the same period in 2000, and 3 percent greater than the 5-year average for February. Increased movement could be attributed mainly to sharply increased movement of Northwest apples (Washington, Idaho, Oregon), as shipments were down significantly in the other apple-growing regions. The U.S. Apple Association also reports that fresh-market apples in storage as of March 1, 2001, were up 6 percent from March 2000, while processing apple stocks were 3 percent lower. By region, apple stocks were higher in the West (up 14 percent) and lower in other regions: Northeast (21 percent), Southeast (22 percent), and Midwest (24 percent). Of the fresh-market apples in storage, 41 percent were Red Delicious, and there were 2 percent more of this variety in storage than at the same time a year ago (but 5 percent less than the previous 5-year average). Stocks of fresh-market Golden Delicious were down 4 percent and fresh-market McIntosh apples, grown mostly in the Northeast, were down 35 percent. Meanwhile, stocks of fresh-market Granny Smiths were up 5 percent. Also, fresh-market stocks were up significantly for Fujis (up 78 percent) and Galas (up 49 percent).

Increased fresh-market supplies and lower U.S. prices are resulting in fewer imports and larger exports of U.S. fresh apples during the 2000/01 season. Also bolstering exports this season is the continued improvement in Asian economies, several of which are key export markets for U.S. apples. Imports thus far (August through December 2000) were down 19 percent from the same period a year ago. At the same time, exports have already shown a 50-percent increase despite larger world supplies, with shipments to major destinations such as Taiwan, Mexico, Canada, and Hong Kong, all up substantially.

2001 Strawberry Shipments Likely To Recover

Freezing temperatures in late December and early January slowed the progress of Florida's 2001 winter strawberry crop. Shipments from November 12, 2000, through January 13, 2001, as reported by USDA's Agricultural Marketing Service-Market News, were 39 percent behind last year. While no major damage to fruit was reported, the prolonged cold weather delayed bloom. As growers flooded their fields to protect the plants and immature fruit from the freeze, wet fields also slowed the harvest. Besides cold weather, harvesting also progressed at a slower pace due to a shift to later producing varieties. Although shipment volume picked up by mid-February, overall shipments through early March were still down significantly from last year.

Florida's strawberry season typically runs from November through April (at times extending through May), with peak volume usually during February and March, and tapering off in April when larger supplies from California become available. Both planted and harvested acreage for this year's winter strawberry crop is forecast at 6,500 acres, up 3 percent from last year and 5 percent above 2 years ago. The increase in acreage, however, will not be able to compensate for the lower shipment volume thus far. Production of this year's winter crop is expected to fall short of the State's record-large crop of 220.5 million pounds in 2000. As of January 16, 2001, f.o.b. prices in Central Florida (shipping-point basis) averaged $12.75 per flat of 12, 1-pint baskets of medium and medium-large berries, up from $8.50 to $12.50 a year earlier. Although higher than the previous season, prices have declined seasonally this winter from a high of $26.75 to $28.75 in late November 2000 to $11.75 to $12.75 as of mid-February.

Based on the annual acreage survey conducted by the California Strawberry Commission, strawberry acreage statewide in 2001 is expected to decline about 5 percent from a year ago. Despite the slightly smaller acreage devoted to strawberry production this year, increased plantings of the Diamante and Aroma varieties, fairly new varieties that are ever-bearing and high-yielding, are expected to make up for some of the reduced acreage and keep production near last year's record-high crop of 1.5 billion pounds. These two varieties, developed by the University of California-Davis, are replacing the Selva variety, a late-season variety that has relatively lower yields and lower quality.

California harvests the largest strawberry volume, growing an average of 83 percent of the U.S. total (table 16). For this year, cumulative shipments (January-February) of fresh strawberries from California were running 24 percent

Table 16--Strawberries: Acreage, yield per acre, and production for major States, 1998-2000

Crop and State	Acreage			Yield per acre			Production		
	1998	1999	2000	1998	1999	2000	1998	1999	2000
	-- Acres harvested --			-- Short tons --			-- 1,000 short tons --		
Early:									
Florida	6,200	6,200	6,300	13.0	15.0	17.5	80.6	93.0	110.3
Late:									
Arkansas	180	210	1/	2.2	2.6	1/	0.4	0.6	1/
California	24,200	24,600	27,600	28.0	30.8	27.5	677.6	756.5	759.0
Louisiana	400	400	1/	7.5	7.5	1/	3.0	3.0	1/
Michigan	1,400	1,400	1,300	3.4	3.2	3.5	4.8	4.5	4.5
New Jersey	450	450	450	2.2	2.2	1.8	1.0	1.0	0.8
New York	1,600	1,600	1,600	1.9	2.5	2.1	3.1	3.9	3.3
North Carolina	1,600	1,600	1,700	6.3	5.5	6.8	10.0	8.8	11.6
Ohio	1,000	1,000	1,000	2.6	2.0	2.2	2.6	2.0	2.2
Oregon	4,400	4,200	3,500	5.8	5.0	5.0	25.3	20.8	17.7
Pennsylvania	1,200	1,300	1,300	2.1	2.0	2.5	2.5	2.6	3.3
Virginia 2/			500			5.5			2.7
Washington	1,500	1,500	1,500	4.0	4.0	4.3	6.0	6.0	6.5
Wisconsin	1,100	1,100	1,000	2.8	2.4	2.2	3.1	2.6	2.2
Total 3/	45,230	45,560	47,750	18.2	19.9	19.4	819.9	905.2	923.8

1/ Estimates discontinued in 2000. 2/ Added to estimating program in 2000. 3/ Totals may not add due to rounding.

Sources: National Agricultural Statistics Service and Economic Research Service, USDA.

behind the same period a year ago. January shipments, in particular, were lagging 43 percent. In the same month, f.o.b. prices (shipping-point basis) per flat of 12, 1-pint baskets of strawberries from the South District of California were mostly $18.75, up from the range of $12.50 to $13.75 reported for January 2000. A relatively cold winter this year has slowed development of the crop as opposed to a relatively early start to the season last year when mild temperatures hastened crop maturity. Also, storms that passed the southern California growing regions this winter have disrupted field activities. Rains in February affected the quality of some fresh-market berries, resulting in a diversion of some berries to the processing sector for juice or other processing uses. Although total shipments for February exceeded those of the same period last year, volume was down significantly at the end of the month. With improved weather, growers are optimistic that their strawberry crops could get back to full production. Heavy shipments are expected during California's peak season (April-June), with enough volume for Mother's Day and Easter retail promotions. As of February 26, 2001, f.o.b. prices ranged from $14.75 to $16.80, with a reported wide range in quality. Prices are expected to continue to decline as shipment volume gains momentum. Expectations of continued abundant domestic supplies, along with reduced world supplies, will help boost the export potential of U.S. strawberries in 2001.

Avocado Production To Be Up Sharply in 2000/01, Prices To Fall

NASS releases the official U.S. avocado crop estimate for the 2000/01 season on July 6, 2001. However, based on estimates from the Florida Agricultural Statistics Service (FASS) and the California Avocado Commission (CAC), domestically-grown avocados will likely be in abundant supply this year with the harvest of approximately 236,500 short tons. If realized, this season's production will be up 29 percent from the previous season and up 31 percent from the previous 5-year average (table 17). Utilized as an indicator of total production, certified shipments from the Florida 2000/01 crop was estimated by FASS to be 25,000 tons, up 19 percent from the previous season and the largest crop harvested since the 1991/92 season. Florida's avocado cropland escaped the cold weather and freezing temperatures that affected much of the State this winter, resulting in a crop free of leaf or fruit damage. Last year, production was curtailed by loss of fruit due to the strong winds from Hurricane Irene that passed through the Homestead area on October 15, 1999. The quality of the fruit also deteriorated after the storm, resulting in a lot of fruit drop, particularly large-size fruit. Although most of Florida's commercial avocados mature from June through March, the heaviest shipments usually run from August through December. Through January 2001, approximately 99 percent of the estimated certified shipments had been shipped.

California avocado growers will likely harvest the State's second largest avocado crop since 1992/93. Over 85 percent of the Nation's avocado crop is produced in California, where the harvest usually begins in November and continues to the following November. Recent rains have helped fruit to size better, increasing the volume of large size fruit which was in short supply earlier during the season. Based on 2000/01 estimates from the California Avocado

Table 17--U.S. avocado production, by State, 1985/86-2000/01

Crop year 1/	Florida	California	Hawaii	Total
		--1,000 short tons--		
1985/86	28.5	160.0	0.6	189.1
1986/87	24.7	278.0	0.7	303.4
1987/88	29.0	180.0	0.5	209.5
1988/89	27.0	165.0	0.6	192.6
1989/90	33.5	105.0	0.6	139.1
1990/91	19.6	136.0	0.5	156.1
1991/92	28.3	156.0	0.4	184.7
1992/93	7.2	284.0	0.4	291.6
1993/94	4.4	139.0	0.3	143.7
1994/95	20.0	155.0	0.3	175.3
1995/96	19.0	171.0	0.3	190.3
1996/97	23.5	167.0	0.2	190.7
1997/98	24.0	154.0	0.3	178.3
1998/99	23.0	136.0	0.3	159.3
1999/00	22.0	161.0	0.3	183.3
2000/01 2/	26.1	210.1	0.3	236.5

1/ Crop years begin: California, November; Florida, June; and Hawaii, January of first year shown.
2/ Estimates from the California Avocado Commission, the Florida Agricultural Statistics Service, ERS estimates for Hawaii.

Sources: National Agricultural Statistics Service, USDA and Hawaii Agricultural Statistics Service.

Commission, California's production is expected to exceed last year's crop by more than 20 percent. Most of the production is in the following counties: San Diego (46 percent of output), Ventura (20 percent), Santa Barbara (14 percent), Riverside (13 percent), and Orange (4 percent). Among the commercially-grown varieties, Hass avocados remain the most predominant, with approximately 93 percent of the plantings concentrated in San Diego county. Hass avocado production is estimated to account for 90 percent of California's 2000/01 avocado output.

Because overall domestic supplies in 2000/01 are anticipated to exceed last season, avocado prices are likely to average lower. So far, 2000/01 California shipments from November to late February have been running 10 percent ahead of the same period in 1999/2000. Most of California's shipments usually occur between March and August. In February, f.o.b. prices (shipping-point basis) per two-layer carton of Hass avocados in Fresno, California ranged from $29.25 to $30.25 for size 48's and $19.25 to $23.25 for size 60's. In comparison with last year, prices for size 48's averaged $46 and for size 60's averaged $43.

Despite a significantly larger U.S. crop, strong consumer demand and the strong U.S. dollar will likely attract more avocado imports into the United States for the 2000/01 season. More than half of the import shipments come from Chile, but Mexico is also an important supplier with 1999/2000 shipments up sharply from the previous season. For the 2000/01 season, the Foreign Agricultural Service forecast Chile's avocado production to increase 11 percent from the previous season (due to favorable weather and new orchards coming into production) and exports to increase 14 percent. In Mexico, because avocado exports continue to be profitable, exports are forecast to increase 56 percent despite a 26-percent reduced crop. Mexico's crop is expected to be smaller due to unfavorable weather and intentional delays in harvesting to avoid market saturation and declining Mexican avocado prices.

Increased U.S. supplies and reduced production in most avocado-producing countries, including Mexico, the world's largest avocado producer, point to increased U.S. avocado exports in 2000/01. New markets for U.S. avocados will also aid the export picture. Chile, a large producer of avocados, opened its market to U.S. avocados on December 1, 2000. Previously, U.S. avocados were barred from entry into Chile due to pest concerns. The final rule allowing U.S. avocados into Chile was announced by the Agriculture and Livestock Service (SAG) of the Chilean Ministry of Agriculture on September 29, 2000. Under the rule, U.S. avocado shipments into Chile should have a phytosanitary certificate and be inspected by SAG officials. Market access into Chile will offer significant opportunities to U.S. avocado exporters, particularly at a time when the industry is faced with one of the largest crops ever harvested. Industry sources estimate the Chilean market to have a market potential of about $2 million annually, over one-fourth the average value of U.S. avocado exports to all destinations during 1996/97-1998/99. If this estimate holds true, this could position Chile as the second largest market for U.S. avocados. Currently, the Netherlands, Canada, and Japan are the top three markets for U.S. avocados, with over 70 percent of total export value. Because Chile is located in the Southern Hemisphere, its production is on alternate seasons with the United States, reducing the likelihood of direct competition between the two countries. In addition, Mexico, the world's largest avocado producer, currently is denied the privilege of shipping their avocados into Chile due to phytosanitary concerns.

Stone Fruit Crops Developing Early, Abundant Supplies and Good Quality Likely

Early indications point to another strong crop of California peaches and nectarines in 2001, according to industry sources. Abundant supplies of good quality peaches and nectarines are expected, but this same situation may not hold true for plums. Heavy rains in early March hampered bee activity and restricted pollination, particularly for early plum varieties that were already in full bloom. Unlike plums, setting crops during the wet weather was not a problem for some of the early varieties of peaches and nectarines that were also in bloom then because of their self-pollinating nature. While bud and bloom counts indicate the prospects of a full crop for peaches and nectarines this year, weather in the next several weeks will determine the final crop.

In general, stone fruit orchards in California received well over 1,000 chill hours (the amount of time the temperature is below 45 degrees Fahrenheit) as of early February, according to the California Tree Fruit Agreement (CTFA). Although still below the average of 1,146 chill hours, it was sufficient for the trees to achieve full dormancy. Hence, the trees are more likely to produce fruits that are less susceptible to pests and diseases, less prone to bruising, and have a longer shelf life. Orchards received beneficial rains this winter, but the amount of rainfall is still slightly below average in spite of the heavy rains that occurred in early March. Because most of the orchards are equipped with water pumps and wells, sufficient moisture requirements were still met. Concerns about possible water supply shortages in California's stone fruit growing region, however, were alleviated somewhat by the recent rains that slowed fieldwork but further improved high-elevation snow packs and spring runoff prospects.

Rolling blackouts experienced throughout much of California this winter were not much of a threat to California stone fruit orchards because the trees were all dormant. Rolling blackouts, however, continuing through the spring and summer, will be worrisome to stone fruit growers for a number of reasons. Irrigation schedules will be interrupted since most of the irrigation equipment is run by electricity. None of the packinghouses have generators, which could cause temporary disruptions in packing operations. Consequently, these would result in higher costs and reduced productivity because workers will be paid for the hours when work is temporarily halted and they will also have to be at the packinghouse longer than usual to finish a full day's work. Stone fruits also require much of the field heat to be removed prior to shipping in order to preserve quality. Because many cold storage facilities do not have generators, the pre-cooling process will be slowed and consequently cause disruptions in shipment schedules as it directly affects the number of trucks that can get loaded.

As of the second week of March, early varieties of plums, peaches, and nectarines were in bloom and in general, these varieties were developing 3 to 5 days ahead of last year. Earlier in the growing stage, it appeared that the timing of this season's stone fruit development was going to be about 5 to 7 days ahead of last year. Very cold weather, especially in late January, slowed crop development.

A strong growing season may put downward pressure on stone fruit prices this summer. However, if export markets remain strong as they had last year, the downward pressure on prices could be moderated. U.S. exports of fresh peaches (including nectarines) and fresh plums were up 15 percent and 12 percent from a year earlier last year. Japan also opened its market for the first time to U.S. fresh nectarines last year. However, because it was late in the season when the market opened, domestic supplies were already scarce and only a small volume was shipped. This year, the Japanese market will open for U.S. nectarines around June 15, according to CTFA. This is earlier in the U.S. stone fruit season, making supplies more available for shipments, granted export quality requirements are met.

Chilean Fruit Imports To Grow During 2001

Chilean fresh fruit shipments to the United States (mostly from the months of November through March) have seen remarkable growth during the 1990's. In particular, among Chile's major export products to the United States, fresh shipments of avocados, apples, kiwifruit, berries (including strawberries), and mangoes were up sharply in 2000 from shipments during 1991 (table 18). Fresh grape shipments, the largest single U.S. fruit import from Chile, grew 25 percent during the same period. Relative to 1999, fresh ship-

Table 18--The volume of selected fresh fruit and juice imports from Chile, 1991-2000

Commodity	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
					1,000 lbs					
Apples	54,339	58,721	55,694	44,946	45,332	62,759	58,667	82,198	94,735	96,356
Avocados	31,299	35,487	3,931	40,498	25,069	35,876	33,366	98,670	70,074	112,765
Berries, excl. strawberries	6,061	4,440	4,628	6,743	7,977	20,082	18,643	10,440	18,940	20,048
Grapes	633,132	612,989	615,543	619,302	581,634	645,725	600,392	637,651	606,128	792,953
Kiwifruit	6,829	27,141	42,867	54,778	74,000	69,730	61,017	59,264	55,052	54,439
Mangoes	6	38	16	0	0	0	16	2	0	86
Peaches	110,010	115,937	90,869	97,807	99,850	96,262	89,842	76,220	105,331	95,372
Pears	59,321	78,576	98,793	97,904	57,365	73,658	82,047	50,908	74,339	54,764
Plums	52,312	55,680	48,906	48,094	50,036	45,206	50,163	43,470	58,391	50,596
Strawberries, fresh and frozen	42	432	645	0	39	31	416	127	460	1,848
					1,000 sse gallons					
Apple juice	29,506	30,599	34,056	19,513	18,439	29,876	29,789	32,086	63,929	40,124
Grape juice	1,741	3,234	293	1,251	3,886	7,003	4,535	1,796	3,799	4,056

Source: Bureau of the Census, U.S. Department of Commerce.

ments were all up, except for stone fruit, pears, and kiwifruit, as unseasonably heavy rains adversely affected yields and lowered the quality of these crops.

Favorable weather throughout most of Chile's fruit-growing season has benefited the country's production of apples, pears, table grapes, avocados, stone fruit, and kiwifruit for the 2000/01 marketing season. Improvement in both yields and quality for most of these crops point to the prospects of increased Chilean fruit exports this year. Most Chilean fruit shipments to the United States, therefore, are expected to be up from a year ago. Also fueling the growth in Chilean shipments to the United States is the devaluation of the Euro against the U.S. dollar, which is making the European market, Chile's largest export market for fruit, unattractive to Chilean fruit exporters. Chilean exporters are shifting some of the fruit shipments that would normally be bound for the European market to the United States where they receive higher prices.

Grapes are Chile's biggest export crop and more than 50 percent are shipped to the United States. Chile produces over 36 varieties for export, with Thompson seedless, Flame seedless, and Ribier making up the bulk of production. Planted acreage seemed to have stabilized over the years, with more recent plantings done only to replace aging vineyards. These new plantings are mostly new varieties that better reflect market demand, such as the Red Globe variety. According to USDA's Foreign Agricultural Service, Chile's fresh table grape harvest for the 2001 marketing season is expected to increase 4 percent from a year ago, to 975,000 metric tons—the second consecutive year of growth. Production will also expand this year as new vineyards come into production. About 61 percent of this output will be exported, with outgoing shipments up 4 percent from a year earlier. Cumulative U.S. imports of fresh grapes thus far (November-December 2000) are up 82 percent from the same period a year ago. Shipments are running a week earlier than last year as warm weather in the northern growing regions of Chile caused the fruit to mature faster. The good supply and quality of this year's fruit should result in increased promotions this winter for table grapes, and that should result in lower retail prices. From November 2000 through January 2001, U.S. retail prices for Thompson seedless grapes, the only retail price for grapes reported by the Bureau of Labor and Statistics, averaged 3 percent lower than the average of the same period a year ago.

Chile is the largest major foreign supplier of avocados to the U.S. market. U.S. avocado imports from Chile increased to a record 113 million pounds in 2000 compared with 1999, reflecting increased production as a result of good weather conditions and more new orchards reaching bearing age (table 18). With similar factors affecting production expansion in 2001, imports are expected to increase again this year. U.S. imports thus far (November-December) are already up 103 percent from the same period a year ago. The United States continues to be the destination for virtually all of Chile's avocado exports.

Despite reduced production in Chile during 2000, U.S. apple imports rose 2 percent from the previous year as Chilean exporters took advantage of more attractive prices in the United States relative to prices in the European market. With excellent growing weather, prospects appear strong that Chile's apple harvest will be up sharply for the 2001 marketing season. In an effort to maintain and expand their export markets, Chilean apple producers continue to plant more new varieties such as Fuji, Gala, Jonathan, and Braeburn that have increasingly become more popular, particularly among their foreign customers. While a majority of Chile's apple exports are of the red varieties, exports of the sweet varieties such as Fujis are increasing in share. Chilean apple exports for the 2000/01 marketing season are also likely to expand as a result of increased production. Unfavorable exchange rates will likely encourage Chilean

Table 19--The value of selected fresh fruit and juice imports from Chile, 1991-2000

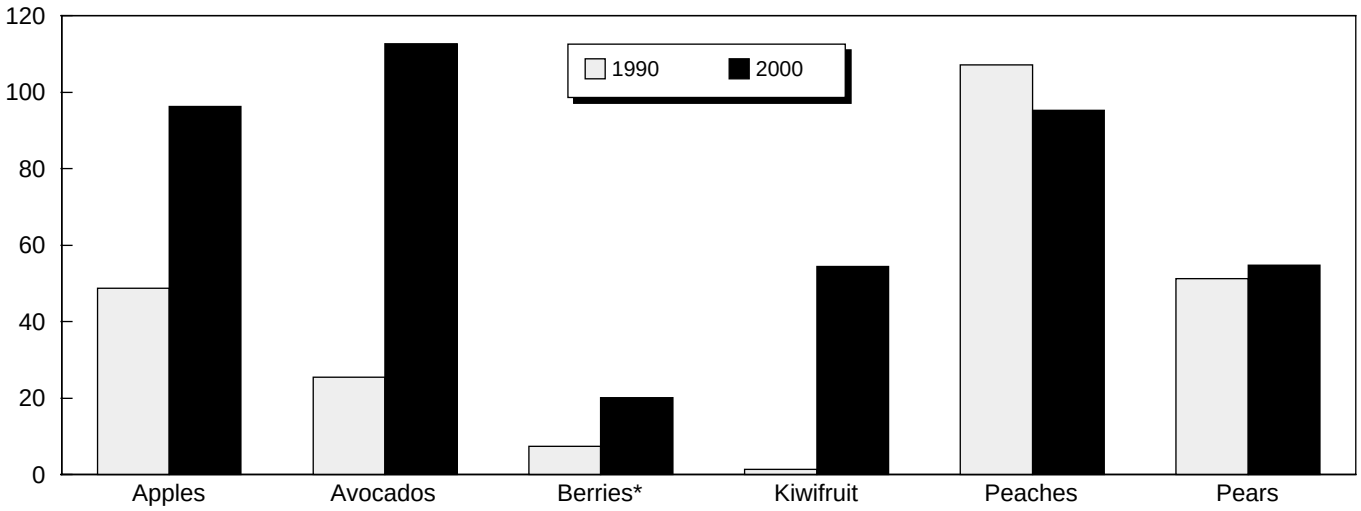
Commodity	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
					1,000 dollars					
Apples	8,055	11,558	9,466	7,096	7,025	13,088	14,386	17,140	28,666	22,552
Avocados	15,974	13,093	1,530	22,242	10,863	16,485	15,924	46,562	38,546	70,004
Berries, excl. strawberries	3,951	3,852	3,897	5,398	7,178	13,626	13,711	8,622	16,656	19,202
Grapes	198,825	193,718	202,848	216,766	212,509	294,001	264,746	277,647	304,736	388,078
Kiwifruit	2,417	9,674	10,902	13,840	18,370	18,344	14,965	16,295	18,770	13,229
Mangoes	2	27	15	0	0	0	10	1	0	39
Peaches	32,681	32,784	25,999	28,674	30,695	33,544	31,298	28,490	42,373	38,593
Pears	9,098	11,780	14,889	16,071	9,393	15,665	18,537	10,644	20,278	17,394
Plums	15,007	15,642	14,045	14,429	15,756	17,523	21,032	17,780	25,867	22,935
Strawberries, fresh and frozen	43	190	316	0	47	18	259	84	309	1,052
Apple juice	39,371	43,665	26,062	10,671	23,874	40,349	34,866	23,512	46,879	41,503
Grape juice	1,806	4,769	553	1,506	4,076	8,509	8,518	3,731	7,751	5,892

Source: Bureau of the Census, U.S. Department of Commerce.

exporters to continue to divert European-bound apple shipments to non-European markets. Increased fresh-market supplies resulting from the larger Washington crop are lowering U.S. prices. Lower prices combined with larger supplies may limit growth in Chilean fresh apple shipments to the United States during 2000/01.

U.S. concentrated juice imports from Chile declined sharply in 2000 from the previous year. Apple juice concentrate imports, the most important of all juice concentrate imports from Chile, fell 37 percent to 40 million gallons, single-strength equivalent, as a result of the sharply reduced Chilean apple crop last year. With the larger apple harvest expected in Chile for the 2001 marketing season, apple juice concentrate shipments to the United States may increase, especially since U.S. production of apples for the processing sector will likely be limited by production declines in the Eastern and Central States, whose output is geared mostly for processing. In addition, although the quality of the Chilean fresh-market apple crop is expected to be good, increased world supplies, including larger fresh-market supplies in the United States, will likely cause some diversion of Chilean apples to the processing sector. Chile relies heavily on export markets for its apple juice concentrate (AJC) product, little is consumed domestically. Traditionally, processing plants received the rejects of apples destined for the export markets. With increased global competition, efforts are now being geared towards improving the quality of Chile's AJC product. Apple producers are being encouraged to expand existing production of sour-type varieties and to increase plantings of new varieties.

Figure 6
U.S. imports of selected Chilean fruits
1,000 lbs



*Excludes strawberries.

Source: Bureau of the Census, USDC.

Tree Nuts Outlook

Tree Nut Production Declined In 2000/01

Tree nut production was 16 percent lower this year due to the alternate bearing nature of nut trees. Production was down for all nut crops except pistachios. Pistachio production reached a record 243 million pounds in 2000/01, 98 percent higher than a year ago. Bearing acreage was up for all the major California nut crops—almonds, pistachios, and walnuts. Macadamia nut bearing acreage in Hawaii, and hazelnut bearing acreage in both Washington and Oregon declined for the third straight year.

The smaller crops resulted in higher season-average grower prices for almonds, hazelnuts, and pecans. Despite a smaller crop in 2000/01, macadamia nut growers received lower prices for their crop, as did pistachio nut growers with their large crop drawing down prices. The higher prices received for the almond crop helped boost crop value to $1.6 billion, 5 percent higher than the previous year. Almonds accounted for 53 percent of nut production in 2000/01. (Value for the walnut crop was derived using current year production with the previous year's average price. Price estimates for the 2000/01 walnut crop will be available July 6, 2001.) The large pistachio crop was also a factor in the higher value, despite the fall in prices. The grower price increase for the hazelnut and pecan prices were not sufficient to offset the greater decrease in crop size. As a result, revenues from the 2000/01 hazelnut crop totaled $23 million, 35 percent lower than the previous year. Pecan revenues dropped 31 percent to $227 million.

Large carryin stocks for almonds this year (August through February) helped offset the smaller crop, and supply totaled 884 million tons (shelled), slightly lower than last year's record crop. Domestic sales (including commitments) were lagging slightly behind last year, and exports were up fractionally, according to the Almond Board of California. Domestic sales accounted for one-third of all almond shipments through February. Shipments were down to the major European markets, Germany, Spain, and the United Kingdom. The recovery of the Asian markets, on the other hand, increased sales to China, India, and Japan. The 2001/02 almond crop is underway as the trees have begun to bloom. While California has been experiencing more than usual rainfall this winter, there have been enough good days to provide sufficient bee activity for pollination. There has been some weather-related damage this winter, and some areas may experience smaller crops. However, because

Table 20--Tree nuts: Acreage, yield per acre, production, and price, 1998/99-2000/01

Commodity and year	Bearing acreage	Yield per acre	Production	Grower price
	Acres	Pounds	1,000 lbs	$/pound
Almonds				
1998/99	460,000	1,130	938,600	1.41
1999/00	480,000	1,740	1,343,600	0.86
2000/01	500,000	1,420	1,145,200	1.25
Macadamia nuts				
1998/99	19,200	2,990	57,500	0.65
1999/00	18,900	2,990	56,500	0.67
2000/01	17,700	2,770	49,000	0.61
Pistachios				
1998/99	68,000	2,760	188,000	1.03
1999/00	71,000	1,730	123,000	1.33
2000/01	74,600	3,260	243,000	0.98
Hazelnuts				
1998/99	29,530	1,040	31,000	0.48
1999/00	29,200	2,740	80,000	0.45
2000/01	28,350	1,700	48,000	0.48
Walnuts				
1998/99	193,000	2,360	454,000	0.53
1999/00	191,000	2,960	566,000	0.44
2000/01	193,000	2,480	478,000	1/
Pecans				
1998/99	--	--	146,400	1.21
1999/00	--	--	406,100	0.81
2000/01	--	--	206,600	1.10

-- = Not available.

1/ Available July 6, 2001

Source: National Agricultural Statistics Service; converted by the Economic Research Service, USDA.

almond production is so widely distributed through central California, weather-related damage is expected to be localized. Since this is an ‘ on year’ for almond production, the crop is expected to be larger than last year, although the industry does not expect a record crop. The official USDA almond forecast for 2001 will be released in NASS’ Crop Production report May 10, 2001.

Beginning stocks for walnuts were up 5 percent in 2001. The slightly larger stocks were not sufficient to offset the 16-percent decline expected in production, and supplies this year are projected to total 312,997 tons, 12 percent lower than last year. The tighter supplies should help push up grower prices this year. The Walnut Marketing Board reported shipments this marketing year from August to January to be up 4 percent for shelled walnuts, but down 21 percent for inshell. Only about one-fifth of inshell walnuts are consumed domestically. About three-quarters of the supply of shelled walnuts, however, are consumed in the domestic market. Exports of inshell walnuts to Spain, the major market, have been running higher than a year ago, but were down to Germany and Italy. Exports of shelled walnuts rose to the top markets, Japan, Australia, and South Korea.

The California pistachio industry celebrates its 25th year of commercial production this year, according to the California Pistachio Commission. Since the first commercial crop in 1976, pistachio production has increased from 1.5 million pounds on fewer than 1,500 acres to 243 million pounds on 74,600 bearing acres in 2000. The industry has prospered due to healthy domestic and international demand for the high-quality U.S. pistachios, as well as the international embargo on Iran, the world’s largest pistachio nut producer. Domestic pistachio consumption has been growing through the late nineties at the expense of exports. Domestic shipments rose from 63 percent of all shipments in 1998/99 to 70 percent in 1999/2000. This year, however, exports have been strong, and the share of total supply has increased. Exports of open-inshell pistachio nuts have risen to Europe, particularly to Germany, Belgium, and Italy, as well as to Japan and Canada. Despite strong demand for pistachios so far this year, the record crop has pushed prices to the lowest level since 1995. The pistachio crop is likely to be smaller this coming year, especially with such a large crop in 2000/01, which should help prices to recover.

Table 21--Free-on-board tree nut prices, 1999-2000

Month	Almonds		Pecans		Hazelnuts	
	Nonpareil supreme		Fancy halves		Large	
	1999	2000	1999	2000	1999	2000
	--Dollars per pound--					
Jan.	2.10-2.25	1.25-1.75	4.00-4.25	2.80-2.85	2.19	--
Feb.	1.75-1.80	1.25-1.80	4.00-4.25	2.80-3.00	2.19	1.90
Mar.	1.50-1.55	1.25-1.75	4.35-4.60	2.80-3.00	2.19	1.90
Apr.	1.50-1.55	--	4.50-4.70	--	2.40	--
May	1.30-1.35	--	4.50-4.70	--	2.40	--
June	1.45-1.50	--	4.50	3.15-3.35	2.40	--
July	1.35-1.60	1.60-1.80	4.50-4.75	3.25-3.80	2.40	1.90
Aug.	1.60-1.70	1.60-1.70	4.75	3.90-4.00	2.40	1.90
Sep.	1.20-1.25	1.60-1.70	4.75	--	2.40	--
Oct.	1.05-1.50	1.65	4.50-4.75	3.75-3.95	2.40	1.99
Nov.	1.00-1.60	1.65	4.50-4.75	--	1.90	1.99
Dec.	1.50-1.60	1.65	3.00-3.05	3.85	1.90	1.99
	Macadamia nuts		Walnuts		Pistachios	
	Style 2		Light halves and pieces		U.S. No. 1 21/25 ct.	
	1999	2000	1999	2000	1999	2000
	--Dollars per pound--					
Jan.	5.00-5.25	3.50-3.60	2.05-2.25	1.55-1.65	1.80-1.85	--
Feb.	4.90-5.00	3.50-3.60	2.00-2.05	1.55-1.65	1.80-1.85	2.45
Mar.	4.50	--	2.05	1.60-1.65	1.80-1.85	2.45
Apr.	4.50	--	2.00-2.10	--	1.80-1.85	--
May	4.50	--	1.90-2.00	--	1.95-2.00	--
June	4.50	--	2.00-2.05	--	--	--
July	4.25	--	2.00-2.05	1.80-2.10	2.30	1.85-2.30
Aug.	4.00	--	2.00-2.05	--	2.30	--
Sep.	3.50	--	1.85-1.90	2.00-2.15	2.30-2.35	1.80-1.85
Oct.	3.50	--	1.55-1.65	2.20-2.25	2.30-2.40	1.80-1.85
Nov.	3.50	--	1.50-1.65	2.30-2.35	2.45	1.75-1.85
Dec.	3.50-3.60	--	1.55-1.70	2.25-2.35	2.45	1.75-1.85

-- = Not available.

Source: Food Institute Report, January 2001.

List of Tables and Figures

Figures

Table 22--Peaches: Total production and season-average prices received by growers, 1998-2000

State	Production			Price per short ton		
	1998	1999	2000	1998	1999	2000
	--1,000 short tons--			--Dollars--		
Alabama	8.0	10.0	7.5	912	594	810
Arkansas	6.3	6.0	9.0	656	680	740
California						
Clingstone	522.5	529.5	532.0	220	226	250
Freestone	340.5	381.5	400.5	314	320	314
Colorado	10.0	1.5	9.5	976	1,280	940
Connecticut	1.2	1.1	1.0	1,400	1,300	1,300
Georgia	35.0	55.0	57.5	690	746	758
Idaho	4.5	4.0	6.5	872	944	774
Illinois	7.5	9.5	11.5	866	778	824
Indiana	1.9	1.5	1.3	636	738	828
Kansas	0.3	0.4	1/	940	840	1/
Kentucky	0.9	1.1	0.6	750	860	1,032
Louisiana	0.7	0.4	0.6	1,420	1,760	1,542
Maryland	5.3	4.4	4.5	600	942	796
Massachusetts	0.9	1.0	1.1	1,600	1,600	1,400
Michigan	21.5	11.5	23.8	544	474	498
Missouri	4.5	5.3	4.8	792	834	700
New Jersey	35.0	35.0	32.5	898	866	854
New York	5.0	7.0	6.0	832	908	800
North Carolina	12.5	14.0	16.0	760	720	740
Ohio	3.4	4.4	5.2	832	894	936
Oklahoma	10.0	7.5	7.0	824	986	1,018
Oregon	4.0	3.5	4.0	632	730	846
Pennsylvania	32.5	37.5	30.0	634	644	574
South Carolina	70.0	80.0	75.0	520	408	408
Tennessee	1.6	1.6	1.3	900	940	1,090
Texas	12.0	6.5	10.5	1,040	1,240	1,160
Utah	3.7	3.1	5.5	540	656	600
Virginia	7.0	7.5	5.0	600	580	600
Washington	26.0	25.5	32.5	1,030	888	766
West Virginia	6.4	6.3	3.5	528	604	512
United States	1,200.4	1,262.9	1,305.5	384	380	392

1/ Estimates discontinued in 2000.

Source: National Agricultural Statistics Service, USDA; converted to short tons by the Economic Research Service, USDA.

Table 23--Blueberry area and production, by State, 1998-2000

State	Area harvested			Utilized production		
	1998	1999	2000 1/	1998	1999	2000 1/
	Acres			Short tons		
Cultivated:						
Alabama	310	310	300	250	325	225
Arkansas	500	450	400	450	565	530
Florida	1,200	1,200	1,400	1,000	725	1,400
Georgia	4,400	4,400	4,600	3,750	5,500	9,500
Indiana	790	770	720	1,550	1,400	1,250
Michigan	16,400	16,600	16,700	24,500	35,000	31,000
New Jersey	7,500	7,500	7,500	18,000	19,500	17,000
New York	700	700	700	750	800	950
North Carolina	3,000	3,200	3,600	7,100	6,500	8,750
Oregon	2,500	2,600	2,700	11,500	11,250	14,000
Washington	1,500	1,600	1,700	5,250	5,440	6,205
Total	38,800	39,330	40,320	74,100	87,005	90,810
Wild:						
Maine	--	--	--	31,491	32,932	55,320
United States	38,800	39,330	40,320	105,591	119,937	146,130

-- = Not available.

1/ Preliminary

Sources: National Agricultural Statistics Service, USDA, and New England Agricultural Statistics Service, USDA.

Table 24--Stocks of frozen fruits and berries: January 31, 1998-2001

Frozen fruit	1998	1999	2000	2001 1/
		-- 1,000 short tons --		
Frozen fruits:				
Apples	35.7	36.7	39.3	33.0
Apricots	5.7	5.0	4.0	3.6
Cherries, tart 2/	65.4	56.1	53.6	54.3
Cherries, sweet	7.2	7.6	6.2	5.6
Grapes	1.3	2.6	2.2	2.5
Peaches	30.2	30.7	30.0	32.7
Frozen berries:				
Blackberries	11.6	9.7	9.9	11.0
Blueberries	41.7	30.4	26.4	38.3
Boysenberries	2.4	1.8	2.3	2.1
Raspberries 3/	21.7	17.6	24.2	23.1
Strawberries	91.1	89.9	130.3	131.3
Other	248.2	263.4	339.9	399.6
Total	562.2	551.5	668.2	737.1

1/ Preliminary.

2/ Includes juice cherries.

3/ Includes black raspberries.

Source: National Agricultural Statistics Service, USDA.

Table 25--Selected citrus, packinghouse-door returns, by month, 1999-2001

Item	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
						--Dollars per box 1/--						
ORANGES:												
Arizona												
1999	24.04	18.70	17.05	18.65	18.34	15.78	--	--	--	29.28	11.21	9.17
2000	7.79	5.75	3.04	4.92	3.24	2.27	2.11	--	--	--	6.06	8.04
2001	7.36	5.83										
Florida												
1999	6.24	6.40	7.43	7.46	7.65	8.38	--	--	--	--	5.01	4.92
2000	5.04	5.06	5.57	6.39	6.64	6.52	5.92	--	--	--	4.43	4.21
2001	4.22	4.43										
California												
1999	7.50	11.57	10.60	14.76	15.11	14.24	11.10	9.14	12.49	11.96	12.07	8.94
2000	8.17	6.73	6.31	5.81	6.46	7.26	4.95	4.25	3.01	3.05	7.34	8.40
2001	9.40	9.34										
Texas												
1999	8.03	9.67	5.17	6.40	6.65	--	--	--	--	10.82	8.60	6.45
2000	4.04	3.80	3.87	3.86	3.44	--	--	--	--	6.68	3.50	3.03
2001	1.76	1.40										
GRAPEFRUIT:												
Arizona												
1999	5.07	4.33	5.50	5.01	8.03	6.10	8.20	--	--	--	--	7.06
2000	5.48	4.93	4.94	3.62	2.97	2.52	3.08	--	--	--	--	5.82
2001	5.92	4.81										
Florida												
1999	4.67	4.40	4.22	4.50	4.58	--	--	--	--	8.96	6.43	6.97
2000	7.17	6.55	6.07	5.63	4.93	3.72	--	--	--	6.24	4.83	4.19
2001	3.84	4.26										
California												
1999	13.68	9.63	7.97	6.28	12.56	14.51	12.35	8.69	6.22	7.59	10.85	13.15
2000	12.03	10.57	9.06	7.27	7.87	6.76	8.30	8.28	8.65	10.33	11.48	10.33
2001	11.89	10.70										
Texas												
1999	5.33	4.77	3.91	3.96	3.84	--	--	--	--	13.09	9.77	6.28
2000	5.85	4.73	5.12	3.78	3.33	--	--	--	--	5.78	5.50	3.25
2001	2.75	2.36										
LEMONS:												
Arizona												
1999	12.07	7.82	5.37	5.39	--	--	--	--	28.97	23.36	13.49	13.89
2000	11.29	9.07	7.98	5.90	--	--	--	--	19.54	18.20	9.31	8.42
2001	6.68	4.90										
California												
1999	11.64	9.21	9.62	10.39	12.23	14.40	18.12	21.99	24.74	19.97	16.70	17.45
2000	17.18	15.23	13.98	10.17	8.12	11.56	16.26	20.16	14.39	10.55	6.04	8.52
2001	7.12	5.03										
TANGERINES:												
Arizona												
1999	20.79	17.95	18.88	17.90	11.80	--	--	--	--	--	12.55	12.75
2000	14.38	9.66	7.07	5.48	1.32	--	--	--	--	--	20.30	16.75
2001	17.81	12.60										
Florida												
1999	17.46	18.19	16.85	21.10	--	--	--	--	--	11.60	10.52	10.22
2000	10.69	9.44	9.89	10.83	10.38		--	--	--	8.98	10.91	10.67
2001	13.87	12.59										
California												
1999	14.05	12.84	12.10	3.58	--	--	--	--	--	27.81	17.15	14.56
2000	13.16	10.33	12.22	11.84	14.37	3.94	--	--	--	--	19.29	15.36
2001	13.01	14.83										

-- = Insufficient marketing to establish price.1/ Net contents per box: oranges: Arizona and California--75 lbs, Florida--90 lbs, and Texas--85 lbs; grapefruits: Arizona and California 67 lbs, Florida--85 lbs, and Texas--80 lbs; tangerines: Arizona and California--75 lbs, and Florida--95 lbs; and lemons: 76 lbs.

Source: National Agricultural Statistics Service, USDA.

Table 26--Fruit and edible tree nuts: Season-average prices per unit received by growers, 1999-2000

Commodity	1999			2000 1/		
	Fresh	Processed	All	Fresh	Processed	All
			--Dollars/short ton--			
NONCITRUS: 2/						
Apples, commercial	426	123	298	6/	6/	300
Apricots, three States	638	292	391	533	280	356
Avocados 3/	2,050	--	2,050	7/	7/	7/
Avocados, California 3/	2,230		2,230	6/	6/	6/
Bananas, Hawaii	700	--	700	700		700
Berries	--	--	1,594	--	--	1,431
Cherries, sweet	1,460	577	1,090	1,800	548	1,330
Cherries, tart	1,124	432	436	1,150	370	374
Cranberries	--	--	354	--	--	8/
Dates, California	1,240	--	1,240	1,250	--	1,250
Figs, California	--	--	273	--	--	281
Grapes	660	438	469	644	387	419
Grapes, California	652	447	479	637	385	418
Guavas, Hawaii	--	182	182	--	6/	6/
Kiwifruit, California	--	--	634	--	--	6/
Nectarines, California	--	--	411	--	--	398
Olives, California	500	398	398	500	641	640
Papayas, Hawaii	804	60	752	702	60	654
Peaches	580	216	380	568	238	392
Pears	393	9/ 184	294	326	9/ 183	267
Pineapples, Hawaii	594	126	288	585	130	287
Plums, California	--	--	419	--	--	442
Prunes, California	--	892	892	--	6/	6/
Prunes and plums, other States	232	182	208	321	151	224
Strawberries	1,470	658	1,222	1,302	490	1,098
			--Dollars/box--			
CITRUS: 4/						
Oranges	16.24	6.11	7.45	8.36	5.20	5.76
Tangerines	19.95	5.14	15.85	14.67	4.21	11.05
Grapefruit	8.12	2.74	5.42	8.63	4.69	6.32
Lemons	20.95	0.83	13.25	21.83	1.12	14.02
Limes	19.60	2.00	16.43	18.10	2.28	15.46
Tangelos	9.90	5.83	7.17	8.20	3.79	5.27
Temples	11.30	5.26	7.25	7.80	3.77	4.68
			--Dollars/pound--			
TREE NUTS:						
Almonds, California 5/	--	--	0.86	--	--	1.25
Hazelnuts, Oregon, Washington	--	--	0.45	--	--	0.48
Macadamia nuts, Hawaii	--	--	0.67	--	--	0.61
Pistachios, California	--	--	1.33	--	--	0.98
Pecans, all	--	--	0.81	--	--	1.10
Improved	--	--	1.01	--	--	1.22
Native and seedling	--	--	0.58	--	--	0.70
Walnuts, California	--	--	0.44	--	--	6/

-- = Not available.

1/ Preliminary. 2/ Fresh fruit prices are equivalent returns at packinghouse-door for Washington and Oregon, equivalent first delivery-point returns for California, and prices as sold for other States. Processing fruit prices for all States are equivalent returns at processing plant door. 3/ Column headed 1999 refers to 1999/2000 crop. 4/ Equivalent on-tree returns; column headed 1999 refers to 1998/99 crop. 5/ Shelled basis. 6/ Data available July 6, 2001. 7/ Data for 1999/2000 will be available May 10, 2001, and July 6, 2001. 8/ Data available August 21, 2001. 9/ Processed mostly canned, but includes small quantities of dried and other uses.

Source: National Agricultural Statistics Service; converted to dollars per short ton by the Economic Research Service, USDA.

Table 27--Fruit for processing: Season-average prices received by growers, by use and principal State, 1998-2000 1/

Fruit, use, & States	1998	1999	2000
	--Dollars/short ton--		
Apricots:			
Canning			
California	330	--	322
Freezing			
California	315	--	298
Drying			
California 2/	258	--	260
Cherries, tart:			
Processing, all			
New York	334	306	348
Michigan	278	452	360
Wisconsin	300	380	450
Cherries, sweet:			
Processing, all			
Oregon	827	732	647
Michigan	544	498	448
Washington	563	580	589
Canning			
Washington	845	730	953
Oregon	1,000	975	1,008
Michigan	580	540	500
Brining			
Washington	565	570	516
Michigan	530	470	430
Oregon	800	710	622
Grapes--California			
All processing	429	447	385
Grapes--California (cont'd):			
Dried 2/	265	292	3/
Wine	500	520	438
Peaches, clingstone:			
Canning			
California	230	232	251
Peaches, freestone:			
Canning			
California	215	216	209
Freezing			
California	200	201	201
Drying			
California 2/	68	73	78
Pears, Bartlett:			
Canning 4/			
Washington	228	159	188
California	231	235	218
Drying			
California 2/	217	150	133
Prunes and plums:			
Canning			
Michigan	255	240	255
Prunes:			
Drying 2/			
California	239	308	3/

-- = Not available.

1/ California fruits are priced at first delivery point, except prunes, pears for drying, and grapes. Prices of those California fruits and other States' fruit are equivalent processing-plant-door returns.

2/ Fresh basis.

3/ Data available July 6, 2001.

4/ Includes small quantities of dried and other processed pears.

Source: National Agricultural Statistics Service, USDA.

Table 28--Fruit and edible tree nuts: Utilized production, 1999-2000

Commodity	1999			2000 1/		
	Fresh	Processed	All	Fresh	Processed	All
			--Short tons--			
NONCITRUS:						
Apples, commercial	2,997,400	2,225,850	5,223,250	5/	5/	5,167,350
Apricots, 3 States	25,800	64,700	90,500	26,580	62,180	88,760
Avocados 2/	183,300	--	183,300	5/	5/	5/
Avocados, California 2/	161,000	--	161,000	5/	5/	5/
Bananas, Hawaii	12,250	--	12,250	14,250	--	14,250
Berries	51,806	144,871	6/ 198,077	52,510	175,120	6/ 228,900
Cherries, sweet	131,910	95,850	227,760	134,560	80,360	214,920
Cherries, tart	900	126,150	127,050	900	139,800	140,700
Cranberries	--	--	316,700	--	--	264,400
Dates, California	22,200	--	22,200	19,900	--	19,900
Figs, California	2,000	43,200	45,200	4,000	45,000	49,000
Grapes	887,221	5,347,609	6,234,830	903,825	6,410,805	7,314,630
Grapes, California	868,000	4,674,000	5,542,000	885,000	5,802,000	6,687,000
Guavas, Hawaii	--	5,350	5,350	--	5/	5/
Kiwifruit, California	23,100	900	24,000	30,000	1,000	31,000
Nectarines, California	256,300	17,700	274,000	8/	8/	266,000
Olives, California	500	141,500	142,000	500	52,500	53,000
Papayas, Hawaii	19,700	1,500	21,200	24,500	2,000	26,500
Peaches	550,150	666,550	1,216,700	591,950	667,900	1,259,850
Pears	536,175	7/ 477,260	1,013,435	562,130	7/ 395,040	957,170
Pineapples, Hawaii	122,000	230,000	352,000	122,000	232,000	354,000
Plums, California	8/	8/	196,000	8/	8/	19,600
Prunes, California (dried basis)	--	165,000	165,000	--	199,000	199,000
Prunes and plums, other States	11,150	10,470	21,620	9,400	12,550	21,950
Strawberries	627,050	278,150	905,200	691,150	232,650	923,800
			--1,000 short tons--			
CITRUS: 3/						
Oranges	1,301	8,523	9,824	2,348	10,765	13,113
Tangerines	236	91	327	295	156	451
Grapefruit	1,250	1,263	2,513	1,138	1,620	2,758
Lemons	461	286	747	537	326	863
Limes	18	4	22	22	4	26
Tangelos	38	77	115	33	66	99
Temples	27	54	81	20	68	88
			--Million pounds--			
TREE NUTS:						
Almonds, California 4/	--	--	833	--	--	710
Hazelnuts, Oregon, Washington	--	--	80	--	--	48
Macadamia nuts, Hawaii	--	--	57	--	--	49
Pistachios, California	--	--	123	--	--	243
Pecans, all 5/	--	--	406	--	--	207
Improved	--	--	187	--	--	49
Native and seedling	--	--	219	--	--	157
Walnuts, California	--	--	566	--	--	478

-- = Not available.

1/ Preliminary.

2/ Column headed 1999 refers to 1999/2000 crop.

3/ Column headed 1999 refers to 1998/99 crop.

4/ Shelled basis.

5/ Data available July 6, 2001. Avocado data available May 10 and July 6, 2001.

6/ Fresh and processed do not add to total because there is no breakdown of utilization available for boysenberries and all raspberries in California.

7/ Processed mostly canned, but includes small quantities of dried and other uses. 8/ Missing data are not published to avoid disclosure of individual operations.

Source: National Agricultural Statistics Service; converted to short tons by the Economic Research Service, USDA.

Table 29--Fruit and edible tree nuts: Value of utilized production, 1999-2000

Commodity	1999			2000 1/		
	Fresh	Processed	All	Fresh	Processed	All
			--1,000 dollars--			
NONCITRUS:						
Apples, commercial	1,278,048	274,567	1,552,615	5/	5/	1,553,536
Apricots, 3 States	16,455	18,922	35,377	14,175	17,404	31,579
Avocados 2/	375,716	--	375,716	5/	5/	5/
Avocados, California 2/	358,900	--	358,900	5/	5/	5/
Bananas, Hawaii	8,575	--	8,575	9,975		9,975
Berries	128,809	152,068	6/ 283,185	147,706	177,755	6/ 325,461
Cherries, sweet	193,145	55,348	248,493	242,766	44,008	286,774
Cherries, tart	1,011	54,494	55,505	1,035	51,718	52,753
Cranberries	--	--	112,235	--	--	7/
Dates, California	27,528	--	27,528	24,875	--	24,875
Figs, California	--	--	12,330	--	--	13,770
Grapes	585,243	2,341,516	2,926,759	581,836	2,482,082	3,063,918
Grapes, California	565,532	2,090,234	2,655,766	563,900	2,232,319	2,796,219
Guavas, Hawaii	--	974	974	--	5/	5/
Kiwifruit, California	--	--	15,215	--	--	5/
Nectarines, California	--	--	112,497	--	--	105,849
Olives, California	250	56,317	56,567	250	33,653	33,903
Papayas, Hawaii	15,839	90	15,929	17,199	120	17,319
Peaches	319,133	143,703	462,836	336,288	158,779	495,067
Pears	210,607	8/ 87,402	298,009	183,239	8/ 72,115	255,354
Pineapples, Hawaii	72,468	28,980	101,448	71,370	30,160	101,530
Plums, California	--	--	82,041	--	--	86,669
Prunes, California	--	147,180	147,180	--	5/	5/
Prunes and plums, other States	2,592	1,908	4,500	3,014	1,893	4,907
Strawberries	922,360	183,153	1,105,513	899,554	113,983	1,013,537
CITRUS: 3/						
Oranges	538,837	1,161,695	1,700,532	507,765	1,245,144	1,752,909
Tangerines	107,577	9,960	117,537	99,284	13,993	113,277
Grapefruit	259,187	81,505	340,692	244,284	179,154	423,438
Lemons	254,115	6,221	260,336	308,568	9,594	318,162
Limes	8,036	180	8,216	9,050	228	9,278
Tangelos	8,296	9,981	18,277	6,035	5,549	11,584
Temples	6,701	6,349	13,050	3,432	5,693	9,125
TREE NUTS:						
Almonds, California 4/	--	--	687,742	--	--	852,000
Hazelnuts, Oregon, Washington	--	--	35,603	--	--	23,064
Macadamia nuts, Hawaii	--	--	37,855	--	--	29,890
Pistachios, California	--	--	163,590	--	--	238,140
Pecans, all 5/	--	--	330,398	--	--	226,975
Improved	--	--	222,647	--	--	192,183
Native and seedling	--	--	107,751	--	--	34,792
Walnuts, California	--	--	250,738	--	--	5/

-- = Not available.

1/ Preliminary.

2/ Column headed 1999 refers to 1999/2000 crop.

3/ Column headed 1999 refers to 1998/99 crop.

4/ Shelled basis.

5/ Data available July 6, 2001. Avocado data available May 12 and July 6, 2001.

6/ Fresh and processed do not add to total because there is no breakdown of utilization available for boysenberries and all raspberries in California.

7/ Data available August 21, 2001. 8/ Processed mostly canned, but includes small quantities of dried and other uses.

Source: National Agricultural Statistics Service, USDA.

Table 30--Production and utilization of specified noncitrus fruits, United States, 1998-2000

Commodity and year	Production		Utilization 1/									
	Total	Utilized 2/	Processed (fresh equivalent)									
			Fresh	Canned	Frozen	Brined	Crushed for			Dried	Other 3/	Total 2/
							Wine	Juice	Oil			
	--1,000 short tons--											
Apricots:												
1998 4/	118.5	108.1	22.9	40.7	10.4	--	--	24.0	--	9.0	--	85.2
1999 4/	90.5	90.5	25.8	--	--	--	--	--	--	--	--	64.7
2000 4/	99.9	88.8	26.6	32.0	10.0	--	--	10.0	--	9.0	--	62.2
Cherries, sweet:												
1998	211.4	208.4	109.0	15.7	--	69.3	--	--	--	--	5/ 14.5	99.5
1999	230.6	227.8	131.9	12.7	--	69.8	--	--	--	--	5/ 13.4	95.9
2000	217.4	214.9	134.6	11.4	--	52.6	--	--	--	--	5/ 16.4	80.4
Cherries, tart:												
1998	174.1	152.8	1.2	37.7	99.9	--	--	--	--	--	14.1	151.7
1999	128.1	127.1	0.9	42.5	69.0	--	--	--	--	--	14.8	126.2
2000	144.3	140.7	0.9	47.7	72.2	--	--	--	--	--	20.0	139.8
Figs:												
1998	51.3	51.3	1.8	--	--	--	--	--	--	49.5	--	49.5
1999	45.2	45.2	2.0	--	--	--	--	--	--	43.2	--	43.2
2000	49.0	49.0	4.0	--	--	--	--	--	--	45.0	--	45.0
Grapes:												
1998	5,820.0	5,816.4	780.8	36.0	--	--	3,314.8	353.3	--	1,331.6	--	5,035.6
1999	6,236.4	6,234.8	887.2	35.0	--	--	3,350.7	502.1	--	1,459.9	--	5,347.6
2000	7,315.3	7,314.6	903.8	32.0	--	--	3,962.0	424.3	--	1,992.6	--	6,410.8
Kiwifruit:												
1998	36.6	33.0	32.0	--	--	--	--	--	--	--	--	1.0
1999	27.0	24.0	23.1	--	--	--	--	--	--	--	--	0.9
2000	35.0	31.0	30.0	--	--	--	--	--	--	--	--	1.0
Nectarines:												
1998	224.0	224.0	207.6	--	--	--	--	--	--	--	--	16.4
1999	274.0	274.0	256.3	--	--	--	--	--	--	--	--	17.7
2000	266.0	266.0	4/	--	--	--	--	--	--	--	--	4/
Olives:												
1998	90.0	90.0	0.5	6/ 64.2	--	--	--	--	4.1	--	7/ 21.2	89.5
1999	142.0	142.0	0.5	6/ 86.0	--	--	--	--	5.0	--	7/ 50.5	141.5
2000	53.0	53.0	0.5	41.4	--	--	--	--	3.0	--	8.1	52.5
Papayas:												
1998	--	20.0	17.8	--	--	--	--	--	--	--	--	2.2
1999	--	21.2	19.7	--	--	--	--	--	--	--	--	1.5
2000	--	26.5	24.5	--	--	--	--	--	--	--	--	2.0
Peaches:												
1998	1,200.4	1,162.8	500.2	492.6	92.9	--	--	--	--	12.5	64.6	662.6
1999	1,262.9	1,216.7	550.1	498.0	102.1	--	--	--	--	15.7	50.8	666.6
2000	1,305.5	1,259.9	592.0	517.3	109.8	--	--	--	--	12.6	28.2	667.9

See footnotes at end of table.

continued--

Table 30--Production and utilization of specified noncitrus fruits, United States, 1998-2000--Continued

Commodity and year	Production		Utilization 1/								
	Total	Utilized 2/	Fresh	Processed (fresh equivalent)							
				Canned	Frozen	Brined	Crushed for			Dried	Other 3/	Total 2/
							Wine	Juice	Oil			
	--1,000 short tons--											
Pears:												
1998	970.1	967.8	513.8	8/ 376.0	--	--	--	--	--	7.6	--	454.0
1999	1,015.5	1,013.4	536.2	8/ 425.0	--	--	--	--	--	7.0	--	477.3
2000	975.2	957.2	562.1	8/ 335.0	--	--	--	--	--	2.0	--	395.0
Pineapples:												
1998	--	332.0	111.0	--	--	--	--	--	--	--	--	221.0
1999	--	352.0	122.0	--	--	--	--	--	--	--	--	230.0
2000	--	354.0	122.0	--	--	--	--	--	--	--	--	232.0
Plums, CA:												
1998	188.0	188.0	--	--	--	--	--	--	--	--	--	--
1999	196.0	196.0	--	--	--	--	--	--	--	--	--	--
2000	196.0	196.0	--	--	--	--	--	--	--	--	--	--
Prunes, CA 9/:												
1998	108.0	103.0	--	--	--	--	--	--	--	103.0	--	103.0
1999	178.0	165.0	--	--	--	--	--	--	--	165.0	--	165.0
2000	220.0	199.0	--	--	--	--	--	--	--	199.0	--	199.0
Other prunes & plums 10/:												
1998	25.6	24.8	11.8	7.3	1.7	--	--	--	--	4.2	--	13.1
1999	22.9	21.6	11.2	5.4	1.0	--	--	--	--	4.1	--	10.5
2000	23.9	22.0	9.4	5.4	1.5	--	--	--	--	5.7	--	12.6
Strawberries:												
1998	819.9	819.9	566.9	--	--	--	--	--	--	--	--	253.0
1999	905.2	905.2	627.1	--	--	--	--	--	--	--	--	278.2
2000	923.8	923.8	691.2	--	--	--	--	--	--	--	--	232.7

-- = Not available.

1/ For all items except bananas and California apricots, dates, plums, and prunes, some quantities canned, frozen, or otherwise processed are included in other utilization categories to avoid disclosure of individual operations. 2/ Some totals do not add due to rounding. 3/ Tart cherries, juice, wine, and brined; sweet cherries, frozen, juice, etc.; and olives, chopped, minced, brined, and other cured. 4/ Missing data are not published to avoid disclosure of individual operations, but are included in total. 5/ Frozen, juices, and etc. 6/ Canning size fruit only, mostly whole and pitted but also includes some chopped and sliced. 7/ Limited (canned, sliced, chopped, wedged, and undersize). 8/ Mostly canned, includes small quantities dried; other, excluding California dried pears, uses not published by State to avoid disclosure of individual operations. 9/ Dried basis. 10/ Michigan, Idaho, Oregon, and Washington.

Source: National Agricultural Statistics Service, USDA.

Table 31--Value of fruit and tree nut crops, by State, 1998-2000

State	Crop value			Share of U.S.		
	1998	1999	2000	1998	1999	2000
		--1,000 dollars--			--Percent--	
Alabama	11,820	15,265	18,849	0.1	0.1	0.2
Arizona	85,363	137,302	101,382	0.8	1.1	0.8
Arkansas	8,644	10,949	11,559	0.1	0.1	0.1
California	6,474,249	6,757,868	7,031,622	57.6	56.1	56.9
Colorado	17,929	4,099	14,383	0.2	1/	0.1
Connecticut	8,164	8,244	8,135	0.1	0.1	0.1
Florida	1,789,653	1,765,913	1,941,786	15.9	14.7	15.7
Georgia	81,664	150,970	151,816	0.7	1.3	1.2
Hawaii	152,131	165,141	160,048	1.4	1.4	1.3
Idaho	18,168	18,914	29,822	0.2	0.2	0.2
Illinois	12,346	15,722	18,617	0.1	0.1	0.2
Indiana	16,029	16,462	12,354	0.1	0.1	0.1
Iowa	2,317	3,514	2,495	1/	1/	1/
Kansas	509	5,178	869	1/	1/	1/
Kentucky	3,119	2,782	1,967	1/	1/	1/
Louisiana	15,994	18,836	12,148	0.1	0.2	0.1
Maine	38,556	45,962	51,162	0.3	0.4	0.4
Maryland	9,128	7,711	8,118	0.1	0.1	0.1
Massachusetts	68,160	48,403	44,890	0.6	0.4	0.4
Michigan	205,010	249,791	226,609	1.8	2.1	1.8
Minnesota	8,304	7,575	7,447	0.1	0.1	0.1
Mississippi	960	3,975	2,583	1/	1/	1/
Missouri	9,730	14,040	11,246	0.1	0.1	0.1
Montana	2,040	1,076	1,569	1/	1/	1/
New Hampshire	5,296	9,023	9,190	1/	1/	1/
New Jersey	80,072	77,759	73,901	0.7	0.6	0.6
New Mexico	49,360	62,900	43,632	0.4	0.5	0.4
New York	167,833	222,601	193,447	1.5	1.8	1.6
North Carolina	56,242	66,683	71,509	0.5	0.6	0.6
Ohio	25,240	30,686	31,406	0.2	0.3	0.3
Oklahoma	8,884	42,296	9,063	0.1	0.4	0.1
Oregon	271,527	305,996	259,721	2.4	2.5	2.1
Pennsylvania	98,717	113,939	114,541	0.9	0.9	0.9
Rhode Island	668	1,079	870	1/	1/	1/
South Carolina	37,251	33,021	33,597	0.3	0.3	0.3
Tennessee	3,350	3,096	3,344	1/	1/	1/
Texas	72,828	121,274	97,307	0.6	1.0	0.8
Utah	12,942	7,985	20,354	0.1	0.1	0.2
Vermont	7,278	10,640	8,240	0.1	0.1	0.1
Virginia	35,091	41,655	45,080	0.3	0.3	0.4
Washington	1,114,850	1,304,317	1,391,973	9.9	10.8	11.3
West Virginia	12,948	16,221	10,744	0.1	0.1	0.1
Wisconsin	135,465	91,709	76,876	1.2	0.8	0.6
United States	11,235,829	12,038,572	12,366,271	100.0	100.0	100.0

1/ Less than 0.05 percent.

Source: National Agricultural Statistics Service, USDA.