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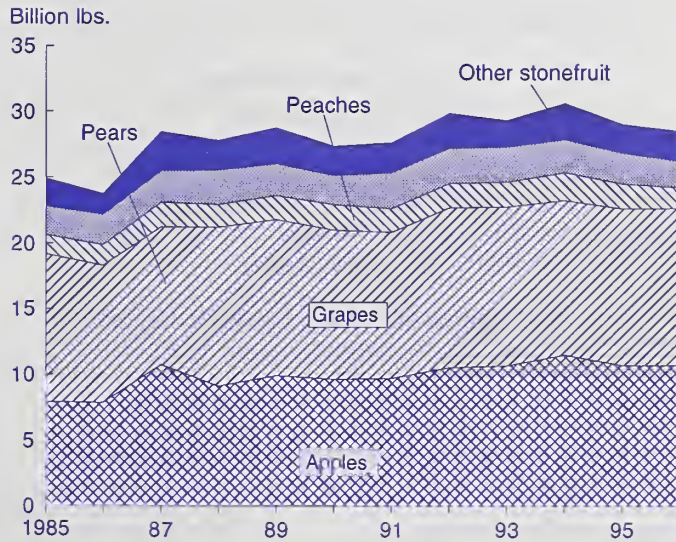
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# Fruit and Tree Nuts

## Situation and Outlook Report

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U.S. Production of Selected Noncitrus Fruits



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## Summary

Grower prices for fruits were higher than a year ago during the first 7 months of 1996, due largely to smaller crops of apples and pears during the fall of 1995, and strong domestic and export demand. Reduced production of grapefruit, Florida Valencia oranges, Florida temples, and tangelos in 1995/96 also helped bolster prices for the season. Almond prices were also up sharply, reflecting reduced 1995 production. Expected smaller crops of peaches, cherries, and blueberries this summer and another small harvest of pears this fall will continue to support grower prices during the second half of 1996. Grape prices this fall and through early 1997 are expected to remain strong, reflecting nearly the same production as last year, a generally good quality crop in California, and continued strong demand. All-apple grower prices during 1996/97 will likely average the same as last year's strong level, reflecting a relatively unchanged 1996 U.S. apple crop and continued tight supplies of processing apples. Strawberry prices this summer and almond prices in 1996/97 may slip given the forecast of a larger new crop.

Higher retail prices for apples, grapefruit, peaches, pears, bananas, and grapes raised the consumer price index for fresh fruits during January-June 1996 to 229, up 7 percent from a year earlier. Light supplies of summer noncitrus fruits will likely keep the index strong this summer while increased production of western crop apples and a larger California table grape crop could weaken the index this fall. A potentially smaller pear crop, however, may offset some of the downward pressure on fresh fruit prices this fall.

U.S. apple production in 1996 is forecast at 10.7 billion pounds, about the same as last year. Cold weather and excessive moisture delayed blooms and reduced crop potential in many apple-growing States. Smaller crops in many central and eastern States will be offset by expected larger crops in Washington and California. Apple production is expected to be up 15 percent in the western States, but down 29 percent in the central States, and down 15 percent in the eastern States. The larger western crop and the expected smaller fruit size of the Washington crop are likely to put downward pressure on fresh-market apple prices. However, continued tight supplies of processing apples and apple juice stocks will likely help to maintain a relatively strong average all-apple price.

California grape production is expected to increase 3 percent above a year ago in 1996, with wine varieties up 1 percent, table varieties virtually unchanged, and raisin varieties up 6 percent. Low chilling hours this winter, particularly in the Coachella Valley, diminished fruit bud formation and reduced yields. Barring any adverse weather, however, other California grape-production areas are expecting typical yields and a good quality crop. USDA forecasts this year's total U.S. grape output to be only fractionally above last year, likely keeping prices strong as last year.

USDA's August forecast puts the 1996 U.S. pear crop 17 percent smaller than a year ago, with production of Bartlett pears on the Pacific Coast down 18 percent and total U.S. production of other varieties down 17 percent.

Sharply smaller crops in Washington and Oregon will likely offset the expected 9-percent gain in California's Bartlett output.

California peach production in 1996 is forecast up 19 percent from a year ago, but sharply reduced crops in many States, especially Georgia and South Carolina, will lower the U.S. output an estimated 13 percent. Total freestone peach production, mainly for fresh use, is forecast down 31 percent, while California clingstones, mostly for canning, are expected up 16 percent.

The 1996 U.S. sweet cherry crop was down 19 percent from a year earlier, reflecting reduced production in Washington, Oregon, Michigan, Pennsylvania, and New York. Low chilling hours during the winter limited California's production potential. California's production was up 26 percent from 1995's weather-reduced output, but 52 percent below 1994's bumper crop. California and Washington grow mostly Bing cherries and other sweet varieties for the fresh market. Fresh sweet cherry prices averaged higher than a year ago, due partly to a 33-percent drop in Washington, the largest domestic source. This year's U.S. tart cherry production dropped 35 percent from 1995, with smaller crops in all producing States except Utah. Production declined 42 percent in Michigan where nearly three-fourths of U.S. tart cherries are grown. Low stocks of frozen tart cherries and a small crop helped to boost prices.

Large gains in California and New Jersey strawberry production are compensating for smaller outputs in Florida, Washington, Oregon, and Michigan. USDA forecasts 1996 commercial strawberry production in the six major producing States to be up 16 percent from a year ago. Increased supplies, including imports, are forcing fresh prices down. More fresh supplies and lower prices will likely encourage fresh strawberry consumption to increase from 3.76 pounds per person in 1995.

Industry sources expect blueberry supplies to be lighter this summer, pushing grower prices up. Cultivated blueberry production will likely decrease in Michigan and other producing States except New Jersey, Washington, and Oregon. Fresh use and processing use of the new blueberry crop will be down this summer.

Preliminary indications from the California Kiwifruit Commission suggest a slightly larger kiwifruit crop in 1996 that could weaken prices in 1997. California's kiwifruit production decreased for the third straight year in 1995. Increased imports made up for the decline, maintaining U.S. supplies and holding prices down. Consumption rose from 0.503 pounds per person in 1994 to 0.514 pounds in 1995.

Hawaii's banana crop in 1996 will decrease for the second straight year due to adverse weather. New acreage is being planted in stages and production is anticipated to increase next year. U.S. fresh banana imports in 1995 were down 1 percent from year-earlier levels, lowering domestic supplies and consumption. Imports during January-May 1996 were virtually unchanged from last year, and if they re-

main unchanged for the rest of 1996, higher prices could be expected. Limited supplies of stone fruit and pears will also help support banana prices during the remainder of 1996.

Imports will likely boost U.S. mango and papaya supplies in 1996. Mango and papaya imports, mainly from Mexico, increased in 1995, pushing U.S. supplies above a year earlier and raising consumption to a new record. Imports and consumption were lower for fresh and canned pineapple, but higher for pineapple juice.

The 1995/96 U.S. orange crop was up about 2 percent from 1994/95, and the second largest on record. A large California orange crop led to an abundant supply of fresh-market oranges. Although the California Valencia crop was up 8 percent, good fruit quality and strong demand raised f.o.b. prices. Meanwhile, higher juice yields boosted orange juice supplies despite a slightly smaller Florida orange crop. Orange juice prices were also above last year's because of reduced carryin stocks and strong domestic demand.

The 1995/96 U.S. grapefruit crop was down 5 percent from a year earlier. Florida's crop was 6 percent smaller,

accounting for 80 percent of U.S. grapefruit production. California's crop was up 2 percent. Florida grapefruit destined for the processing sector declined about 12 percent. Total Florida fresh shipments increased 3 percent in 1995/96, but the growth was in the export market. Florida domestic f.o.b. prices increased for both fresh white and red grapefruit.

Total tree nut production in the United States will likely be up in 1996, reflecting expected larger almond and walnut crops in California. Almond production is forecast up 43 percent from 1995's sharply reduced output, likely forcing prices down in 1996/97 and boosting domestic and export demand. Despite increased production, walnut supplies are expected to remain unchanged due to slightly lower beginning stocks. Therefore, walnut prices in 1996/97 are expected to remain good. Pistachio and pecan crops are expected to be about average size, although smaller than in 1995. Hazelnut production is expected to be much lower this year due to alternate-bearing characteristics of this nut. Hawaii's macadamia production will likely continue to trend upward due to the increasing number of bearing trees.

## Noncitrus Prices Strong in 1996

Smaller crops of many noncitrus fruits this summer point to strong grower and retail prices during the second half of 1996. Production of apples and grapes will be nearly unchanged from last year, and along with a smaller pear harvest, 1996/97 prices are likely to remain strong. Good quality and continued strong domestic demand will buoy fresh Valencia orange prices.

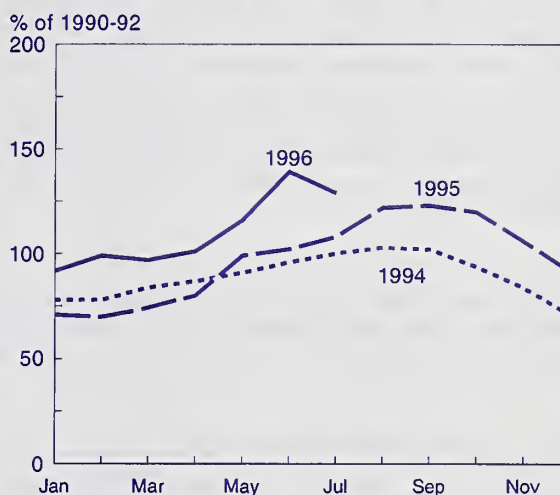
### Smaller Crops Bring Higher Prices

The grower price index for fruit and nuts (1990-92=100) averaged higher than a year ago during the first 7 months of 1996 (table 1). Contributing to the strong price index were higher grower prices of apples, grapes, peaches, pears, grapefruit, oranges, and almonds. Smaller crops of apples and pears during the fall of 1995 supported their respective prices. The 1995/96 season-average grower price for apples, at 16.7 cents a pound, was up 29 percent from 1994/95, and the season-average price for pears was 13.4 cents, up 20 percent.

Production of grapefruit, Florida Valencia oranges, Florida temples, tangelos, and almonds also declined during the 1995/96 marketing season. While orange juice production was up from a year earlier, lower frozen concentrated orange juice (FCOJ) inventories and strong domestic demand kept processing orange prices higher than a year ago. From January to June 1996, preliminary U.S. on-tree equivalent prices for processing oranges averaged \$4.87 a box, compared to \$3.32 a year earlier. At the same time, the U.S. all-orange on-tree equivalent price rose from \$4.27 a box to \$5.20.

The grower price index for fruit and nuts will likely continue strong through the second half of 1996 and into early 1997. The expected smaller peach crop this summer and the forecast of another small pear harvest this fall will continue to support grower prices. Grape prices are likely to remain strong through early 1997 as the 1996 output will be nearly the same as last year, domestic and export demand should continue strong, and the grapes, particularly in California, will be of good quality. All-apple grower prices during the 1996/97 marketing season will likely match last year's strong level, reflecting a relatively un-

Figure 1  
Prices Received by Growers for Fruit and Nuts



changed 1996 U.S. apple crop and continued tight supplies of processing apples brought by smaller crop forecasts for central and eastern States. Although not included in the calculation of the grower price index, expected smaller crops of sweet and tart cherries and blueberries will continue to support grower prices.

From January to June 1996, U.S. fresh orange on-tree equivalent prices averaged about 9 percent lower than in January-June 1995, but the average price in July matched last year's level. The larger 1995/96 California navel crop, which had quality problems, was partly the reason for lower fresh orange prices during the first half of 1996. Navel oranges dominate the fresh orange market from fall through early spring, while Valencia oranges are most available during the spring and summer months. The good quality of the 1995/96 California Valencia crop will likely boost domestic demand. Hence, in spite of the expected larger Valencia crop, strong demand and the expected high prices of many noncitrus fruits will likely help support fresh orange prices this summer. Increased supplies of summer strawberries and the forecast of a larger 1996 almond crop will likely force their grower prices down, offsetting some of the strength in the fruit price index during the second half of 1996.

### Consumers Pay More For Fruits

The Consumer Price Index for fresh fruits (1982-84=100) remained above a year ago from January to July 1996, with higher retail prices for apples, grapefruit, peaches,

Table 1--Index of prices received by growers for fruit and nuts, 1992-96

Month	1992	1993	1994	1995	1996
	1990-92=100				
January	105	72	78	71	92
February	106	72	78	70	99
March	109	69	84	74	97
April	104	73	87	80	101
May	98	81	91	99	116
June	100	97	96	102	139
July	92	101	100	108	129
August	102	113	103	122	
September	101	112	102	123	
October	96	107	94	120	
November	92	105	82	106	
December	80	86	71	92	
Annual	99	91	89	97	

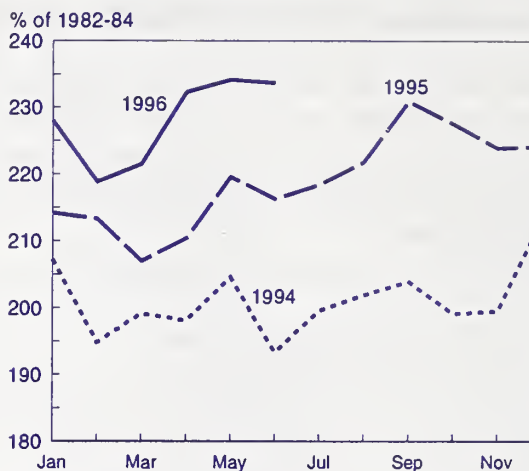
Source: National Agricultural Statistics Service, USDA.

pears, bananas, and grapes. Prices of Red Delicious apples rose seasonally during the first 7 months of 1996 as the 1995/96 marketing season wound down and inventories remained tight. The CPI for fresh fruits will likely remain strong this summer as fruit supplies become limited by reduced production of many summer noncitrus fruits. The fresh fruit index will likely weaken in the fall, reflecting increased apple supplies from the western States, more smaller-sized apples, and the expected large California table grape crop. However, a potentially smaller pear crop this fall will likely offset some of the downward pressure on fresh fruit prices.

The Consumer Price Index for fresh fruit (1982-84=100) averaged 9 percent higher in 1995 than in 1994 (table 2). Contributing to the increase were higher retail prices for fresh oranges, Red Delicious apples, grapefruit, lemons, bananas, peaches, grapes, and strawberries. Retail prices for navel oranges averaged 62.5 cents a pound in 1995, up from 54.5 cents in 1994, and Valencia oranges averaged 64.8 cents a pound, up from 58.7 cents. Retail prices for Red Delicious apples were 3.2 cents a pound higher in 1995 than in 1994.

The Consumer Price Index for processed fruit (1982-84=100) remained above a year ago from February 1995 through June 1996, mainly reflecting higher prices of orange juice and apple juice. The Consumer Price Index for

Figure 2  
Fresh Fruit: Consumer Price Index



frozen fruit and juice averaged 136.7 in 1995, up from 132.2 in 1994. From January through June 1996, the CPI for frozen fruit and juice advanced to 142.6. Although U.S. orange juice production is forecast up in 1995/96, decreased supplies due to low carryin stocks of frozen concentrated orange juice (FCOJ) and higher apple juice prices are contributing to stronger orange juice prices compared to a year ago. Retail prices for FCOJ averaged 2 percent higher than a year ago during the first half of 1996.

Table 2—U.S. consumer price indexes for fruit, 1994-96

Month	Fresh fruit			Processed fruit		
	1994	1995	1996	1994	1995	1996
	1982-84=100					
January	207.2	214.2	228.0	134.6	134.4	140.7
February	194.8	213.3	218.8	133.0	135.3	141.9
March	199.1	207.0	221.5	133.3	136.5	141.3
April	198.1	210.3	232.3	133.9	136.8	142.8
May	204.6	219.6	234.2	132.6	136.7	145.7
June	193.3	216.3	233.7	132.6	137.2	145.3
July	199.6	218.4	232.7	133.8	138.0	147.6
August	201.9	221.8		132.1	139.2	
September	203.9	230.9		132.4	138.1	
October	199.1	227.5		133.3	138.4	
November	199.5	223.9		132.5	137.6	
December	213.1	224.2		133.3	138.1	

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

## U.S. 1996 Apple Crop the Same as Last Year

*Production gains in Washington and California will offset apple output declines in central and eastern States this fall. Apple prices will likely continue strong.*

USDA's August forecast of the 1996 U.S. apple crop was 10.7 billion pounds, virtually unchanged from last year (table 3). Expected larger crops in Washington, California, and other western States will make up for reduced production in many central and eastern States this fall. In general, cold spring weather and excessive moisture may be blamed for delaying blooms and affecting post-bloom development in many apple-producing States. In the central region, winter freezes, heavy rains, hail, and lack of bees contributed to poor pollination and spotty fruit set. In the eastern States, growers also faced problems with poor pollination and some disease problems resulting from excessive moisture. Production in the western States is forecast up 15 percent from a year ago, while production in the central and eastern States likely will be down 29 and 15 percent, respectively.

Although Washington's 1996 apple crop is forecast to recover from last year's weather-reduced output, outlook for a bumper crop this year will likely be tempered by generally smaller-sized fruits. Production in Washington this year—forecast as the second highest on record—is 5.6 billion pounds, up 12 percent from 1995, but 4 percent below the 1994 record. Apple orchards in California were subject to excessive heat in July which may affect the size of early maturing varieties, but quality, otherwise, is reported excellent. The California apple crop is forecast at 950 million pounds, 12 percent larger than last year. Poor pollination caused by a cool, wet spring in Michigan will likely result in a 32-percent smaller crop, at 825 million pounds. Production in New York is forecast 5 percent smaller, and output is likely to decline 20 percent in both Pennsylvania and Virginia.

### Tight Apple Supplies To Support Prices

Apple stocks remain below a year earlier, following a 7-percent smaller fall harvest in 1995. According to the International Apple Institute, U.S. apple stocks on July 1, 1996, were 8 percent below a year earlier, but 13 percent higher than the 5-year (1991-1995) average for that month. Total stocks intended for the fresh market and for processing were 5 percent and 20 percent less than the year earlier, respectively. Season-to-date apple shipments as of June 1996 were 26 percent less than the same period in 1995, and were 13 percent below the 5-year average. Produce movement to the fresh market and to processors was down 24 percent and 32 percent from a year ago, respectively. This slower movement helped support apple prices, particularly during the first half of 1996.

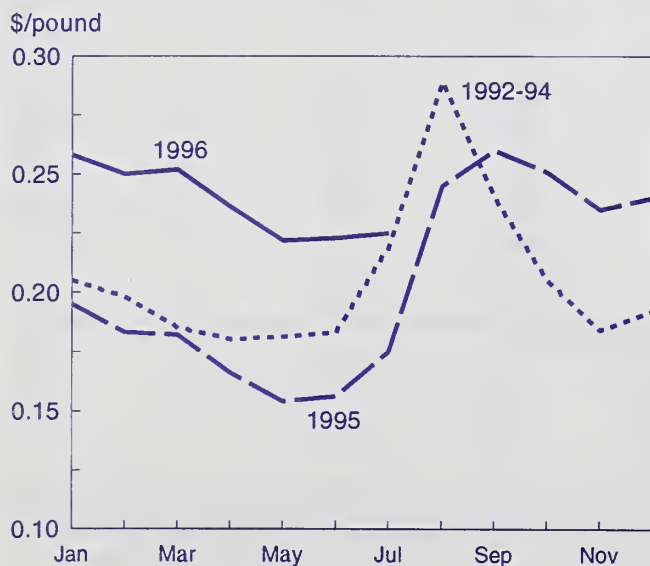
Washington accounted for 90 percent of all apple stocks on July 1, 1996. Stocks were down 8 percent in Washington and 56 percent in California, reflecting smaller crops in these two States last year. Stocks in the Southeast on July 1, mainly from Virginia and West Virginia, were down 54 percent from a year ago. Stocks in the Northeast, mainly from New York and Maine, were up 24 percent. On a varietal basis, U.S. apple stocks on July 1, 1996, consisted mostly of Red Delicious (67 percent), Golden Delicious (16 percent), and Granny Smith (9 percent) varieties.

Tight supplies and strong demand contributed to higher grower prices during the 1995/96 marketing season, raising the crop's value to \$1.76 billion, up 20 percent from the prior season. The 1995/96 season-average all-apple grower price rose from 12.9 cents a pound in 1994/95 to 16.7 cents, the highest since 1990/91's 17.9 cents. Grower prices for fresh-market apples averaged 23.8 cents a pound, compared to 18.6 cents in 1994/95, as some fresh-market apples were diverted to the processing sector. Tight supplies of processing apples drove processing apple prices up 39 percent from 1994/95 to 8 cents a pound in 1995/96. The larger 1996 Washington crop and smaller fruit size will likely put some downward pressure on fresh-market apple grower prices during the 1996/97 marketing season. Meanwhile, smaller apple crop forecasts in the central and eastern States along with the recent drawdown of domestic and international apple juice stocks will likely keep processing apple prices strong during 1996/97. Continued high processing apple prices will likely help maintain the average all-apple grower price at last year's strong level.

### Fresh Apple Exports Likely Unchanged

The smaller European apple crop last year led to tight world supplies and high prices of apple juice concentrate, creating a demand for competitively priced U.S. apples. Export demand for U.S. fresh apples during the 1995/96 mar-

Figure 3  
**U.S. Grower Prices for Fresh Apples**



keting season (August/July) will likely continue at about 21 percent of domestic production, nearly the same as the 4-year average share of 22 percent. However, reduced domestic production, low inventories, and increased competition from major exporting countries such as New Zealand and France are limiting the quantity of apples that can be exported by the United States. Through May 1996, exports totaled about 1.1 billion pounds, down 20 percent from the same period a year ago. The smaller fruit size of the 1996 Washington crop and the relatively unchanged level of domestic production may prevent any growth in U.S. fresh ap-

ple exports during 1996/97, especially since major U.S. export markets demand fruit of good quality and size.

The top five U.S. markets during the 1995/96 season were Taiwan, Canada, Mexico, Hong Kong, and Indonesia, which accounted for 62 percent of total U.S. fresh apple exports. Exports through May 1996 dropped 13 percent to Taiwan, 4 percent to Canada, and 33 percent to Hong Kong, while shipments to Indonesia rose 18 percent and to Mexico were unchanged. Other growth markets for U.S. fresh apples were the Dominican Republic and Central America, particularly Guatemala and Honduras.

Table 3--Apples: Total production and season-average price received by growers, 1993-95, and indicated 1996 production 1/

State	Production				Price		
	1993	1994	1995	1996	1993	1994	1995
	-- Million pounds --				-- Cents per pound --		
<b>Eastern States:</b>							
Connecticut	25	25	21	22	23.5	28.3	27.6
Delaware	28	20	11	20	10.6	16.8	18.0
Georgia	34	26	30	22	14.6	13.9	16.4
Maine	54	54	65	58	20.5	17.4	17.9
Maryland	42	35	35	30	14.1	17.3	17.6
Massachusetts	59	63	65	62	20.2	22.6	20.8
New Hampshire	37	41	44	41	21.2	21.7	20.3
New Jersey	75	70	75	55	15.9	15.7	15.9
New York	870	1,100	1,110	1,050	11.6	11.8	12.1
North Carolina	320	250	270	180	5.8	8.8	8.4
Pennsylvania	530	400	500	400	8.6	10.4	9.5
Rhode Island	5	5	5	5	29.3	31.0	30.1
South Carolina	60	60	60	40	13.1	13.0	12.6
Vermont	38	42	45	44	17.0	16.5	18.1
Virginia	370	305	400	320	7.6	9.0	9.9
West Virginia	190	150	175	120	8.2	9.5	10.6
Total	2,736	2,645	2,910	2,469			
<b>Central States:</b>							
Arkansas <sup>3</sup>	12	8	10	7	16.4	16.4	14.3
Illinois	90	47	80	70	16.9	20.9	21.0
Indiana	80	50	75	48	16.6	20.0	19.7
Iowa	10	12	10	8	29.4	24.4	30.3
Kansas	7	5	7	4	16.9	20.6	25.2
Kentucky	22	7	17	14	19.4	21.6	25.5
Michigan	1,020	1,020	1,220	825	8.5	8.6	9.8
Minnesota	23	23	22	20	32.9	33.2	40.3
Missouri	51	33	38	34	18.5	19.8	16.0
Ohio	105	90	120	90	16.0	18.1	20.0
Tennessee	19	10	16	11	16.9	19.5	21.5
Wisconsin	62	80	58	49	22.4	23.0	24.1
Total	1,501	1,385	1,672	1,180			
<b>Western States:</b>							
Arizona	61	64	11	100	6.6	7.8	7.1
California	880	1,050	850	950	15.7	13.3	18.3
Colorado	92	85	55	30	14.7	15.7	14.5
Idaho	195	165	75	170	10.7	10.1	17.9
New Mexico	7	8	3	2/	25.1	21.9	29.8
Oregon	160	200	140	185	13.1	10.7	11.6
Utah	53	48	20	50	12.1	12.1	18.8
Washington	5,000	5,850	5,000	5,600	14.2	13.8	20.8
Total	6,448	7,470	6,154	7,085			
United States	10,685	11,500	10,736	10,734	12.9	12.9	16.7

1/ Commercial production from orchards of at least 100 bearing-age trees. 2/ Forecast discontinued.

Source: National Agricultural Statistics Service, USDA.



# Larger California Grape Crop in 1996

California grape output in 1996 is up 3 percent from last year—keeping the U.S. grape crop up fractionally from 1995. Fruit quality is better than last year. Fresh use of the 1995 U.S. grape crop was up, but strong domestic and export demand brought higher fresh-market prices. Wine-type grape prices were also strong.

California grape production is expected at 10.8 billion pounds in 1996, up 3 percent from a year earlier (table 4). Growers finished picking grapes for fresh use (particularly the Thompson seedless variety) in the Coachella Valley by July 1, while harvesting in the San Joaquin Valley will continue through October. Production in the Coachella Valley was lighter than normal this spring due to an unusually warm November. The warm weather shortened the dormancy period for most vines, diminishing fruit bud formation and reducing yields. However, typical yields and good quality grapes are expected from other California production areas as long as weather remains favorable with excellent moisture conditions.

The forecast for California's wine-type grapes is 4.6 billion pounds, up 1 percent from 1995. Output of table-type grapes is expected to be virtually unchanged from last season, at 1.4 billion pounds, while output of raisin-type grapes will likely be up 6 percent, at 4.8 billion pounds. Last year, output of raisin-type grapes declined 6 percent from the prior year partly because 25,000 acres were enrolled in the Raisin Industry Diversion program. This year, no acreage was enrolled in this program.

USDA forecast grape production in 12 other States to be about 1.1 billion pounds in 1996, 22 percent below last

year. This output will account for about 9 percent of this year's U.S. grape production. Production in Michigan and

Figure 4  
U.S. Grape Utilization

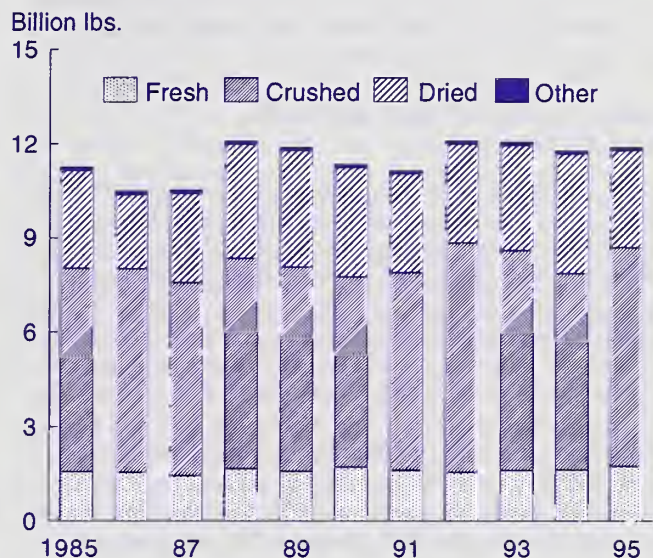


Table 4--Grapes: Total production and season-average price received by growers in principal States, 1993-95, and indicated 1996 production

State	Production				Price		
	1993	1994	1995	1996	1993	1994	1995
	-- Million pounds --				-- Cents per pound --		
Arizona	48	52	52	50	37.7	47.0	44.9
Arkansas	16	12	16	18	24.7	23.8	31.7
Georgia	7	6	6	7	42.2	46.0	55.5
Michigan	110	130	140	124	11.9	11.9	11.9
Missouri	5	5	5	4	18.8	24.4	24.0
New York	236	380	330	370	11.1	10.7	11.1
North Carolina	3	3	3	2	35.5	36.5	39.1
Ohio	14	14	18	16	12.6	12.0	11.4
Oregon	25	22	28	30	40.0	42.3	47.5
Pennsylvania	108	160	126	134	10.5	9.1	8.6
South Carolina	1	1	1	1	71.0	62.0	59.5
Washington	708	450	652	312	12.7	12.8	11.3
Total 1/	1280	1235	1377	1068			
California:							
Wine	4794	4530	4550	4600	18.1	18.9	21.2
Table	1264	1204	1436	1440	28.7	25.8	26.3
Raisin 2/	4708	4778	4510	4800	12.8	11.5	11.0
All	10766	10512	10496	10840	17.0	16.3	17.5
United States	12046	11747	11873	11908	16.7	16.1	17.1

1/ Some figures may not add due to rounding. 2/ Fresh weight of raisin-type grapes.

Source: National Agricultural Statistics Service, USDA.

Washington is expected to be down 11 percent and 52 percent, respectively, while output in New York and Pennsylvania is forecast up 12 percent and 6 percent. Winter freeze damage to the Washington crop has made the State's forecast the smallest since 1986. If the projected crops in California and the other States are realized, the 1996 U.S. grape output will be up only fractionally from a year ago and grape prices will likely remain strong as last year.

### U.S. Grape Production Up in 1995

During 1995, a 1-percent decrease in total bearing acreage was offset by a 6-percent higher average yield, raising U.S. grape output 1 percent from 1994. Yields in California alone averaged 5 percent higher than in 1994. Production of wine- and table-type grapes in California rose fractionally and 19 percent, respectively, while output of raisin-type grapes fell 6 percent from 1994.

### More Grapes for Fresh Use, Wine, And Juice in 1995

Fresh use of the 1995 U.S. grape crop rose 7 percent from 1994, to 1.74 billion pounds, while processed use was about unchanged. California provided 1.67 billion pounds of fresh-market grapes, 96 percent of the Nation's total fresh-market grape output. California also provided 8.8 billion pounds of grapes for processing last year, 87 percent of the U.S. grape output processed. Of the total grape output processed last year, 67 percent was for wine and juice, 31 percent was dried for raisin production, and less than 1 percent was for canning. The actual quantity crushed for wine and juice in 1995 increased 11 percent from a year earlier to 6.94 billion pounds, while the quantity dried for raisin production decreased 19 percent to 3.1 billion pounds.

The average price growers received for all grapes increased from 16.1 cents a pound in 1994 to 17.1 cents in 1995, as lower prices for grapes crushed for juice and dried for raisins were offset by higher prices for fresh-market grapes

and grapes for wine production. Grower prices for grapes intended for canning remained about unchanged from a year earlier in 1995. Strong domestic and export demand helped raise the U.S. season-average price for fresh-market grapes to 31.0 cents a pound in 1995, a 7-percent increase from a year earlier. The same factors also supported prices of grapes crushed to make wine, with the season-average grower price at 19.0 cents a pound in 1995, up 9 percent from a year earlier. However, grower prices for grapes crushed to make juice and grapes dried to make raisins last season averaged 8.0 cents and 8.8 cents a pound, respectively, down 14-15 percent from a year earlier.

### Grape Imports and Exports Rise in 1995/96

U.S. fresh-market grape supplies during the 1995/96 (May 1995-April 1996) marketing season increased from a year earlier, reflecting the largest table-variety grape crop since 1988. Imports for the season were up 10 percent from a year earlier, at 792.6 million pounds, 76 percent of which were shipped from Chile and 22 percent from Mexico (table 5). Most grape shipments from Chile arrive between January and May, which is generally the off-season for U.S. grapes. California, the largest grape-producing State, primarily ships table grapes from May through December, with some overlap into January. Mexico ships primarily during May and June before finishing in early July. Chilean fresh-grape shipments to the United States were 603.4 million pounds during 1995/96, down nearly 3 percent from the same period a year ago. At the same time, Mexican shipments totaled 177.6 million pounds, up 96 percent from a year earlier. Total U.S. fresh grape imports during 1995/96 accounted for 31 percent of U.S. fresh-market grape supplies, about the same as during the past five seasons.

Increased supplies of fresh-market grapes and strong export demand will likely keep U.S. fresh grape exports above the 1995/96 season. Total exports were up 5 percent from a year earlier, to 500.2 million pounds. The top three U.S. markets for fresh grapes were Canada, Hong Kong, and Mexico. Exports to Canada in 1995/96 totaled 228.6 million pounds, 46 percent of U.S. fresh grape exports, and up 2 percent from 1994/95. Exports to Hong Kong totaled 66.8 million pounds, up 43 percent from a year earlier, and represented 13 percent of the U.S. total. Exports to Mexico (6 percent of the total) were down 43 percent, partly reflecting the devaluation of the peso which made U.S. goods relatively more expensive in Mexico. Among smaller markets, exports increased to Central America (particularly Guatemala, El Salvador, and Honduras), South

Figure 5  
Thompson Seedless Grapes: Consumer Price

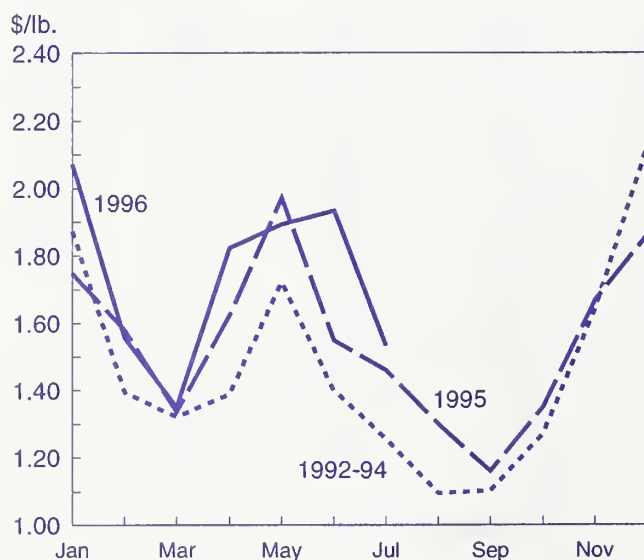


Table 5--U.S. imports of fresh grapes, by country, (May-April)  
1991/92-1995/96

Source	1991/92	1992/93	1993/94	1994/95	1995/96
Million pounds					
Chile	592.3	628.0	586.2	619.0	603.4
Mexico	94.6	81.7	91.1	90.5	177.6
Canada	2.7	3.4	0.6	1.6	2.8
Italy	0.2	0.2	0.7	0.4	0.3
Other	0.3	0.8	2.1	7.6	8.5
World	690.1	714.1	680.7	719.0	792.6

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

America (particularly Brazil, Venezuela, and Colombia), the United Kingdom and the Netherlands, and to Southeast Asia (particularly Malaysia, Indonesia, the Philippines, Vietnam, and Singapore).

The United States remains a net importer of wine, with imports amounting to 72.5 million gallons during 1995 and wine exports at 35 million gallons. U.S. wine imports and exports both increased in 1995, up 3 percent and 10 percent from 1994, respectively. Italy, France, and Chile provided 76 percent of all U.S. wine imports in 1995, while the United Kingdom, Canada, and Japan were the largest markets for U.S. wine. These three countries imported more than half of U.S. wine exports last year. Continued strong domestic and export demand and the expected small increase in California's wine grape production will likely boost U.S. wine imports in 1996. Despite a slightly smaller 1996 crop, Chile's wine exports are forecast to increase 23 percent from a year ago. Chile's export sales are forecast at \$240 million for this year, up 30 percent from 1995, with much of the growth expected to come from sales to the United States.

#### ***U.S. Wine Consumption Up 1 Percent in 1995***

U.S. wine consumption rose to 470.2 million gallons in 1995, from 459.6 million gallons in 1994. On a per capita basis, domestic consumption rose 1 percent to 1.79 gallons

in 1995, but remained 4 percent below the 1990-94 average. Table wines accounted for about 83 percent of domestic wine consumption in 1995, followed by sparkling wines (6 percent), dessert wines (5 percent), wine coolers (4 percent), and vermouth (0.8 percent).

California wine shipments totaled 379.9 million gallons in 1995, 3 percent above a year earlier, and accounted for about 75 percent of domestic consumption. Of these shipments, 353.3 million gallons were destined for the domestic market, with 75.8 million gallons shipped within the State. Wines from other States accounted for 9 percent of the domestic market while imports supplied slightly over 15 percent of the market.

According to USDA's California Agricultural Statistics Service, the red wine grape varieties used in Zinfandel, Cabernet Sauvignon, and Merlot accounted for 59 percent of California's red wine variety grape acreage in 1995 and 30 percent of the State's total wine variety grape acreage. During the same period, the white wine grape varieties used in Chardonnay, Colombard, and Chenin Blanc accounted for 80 percent of the State's white variety grape acreage and 40 percent of California's total wine variety grape acreage. Zinfandel, Cabernet Sauvignon, Merlot, and Chardonnay are all used primarily in varietal wines while Colombard and Chenin Blanc are used more in generic wines.

# Pear Production Down in 1996

U.S. pear production is forecast to decline in 1996. Bartlett pear production is expected down 18 percent from 1995 and output of other varieties down 17 percent. Higher prices are in the forecast.

## Smaller 1996 Pear Crops in Washington and Oregon

USDA's 1996 U.S. pear crop forecast is 1.57 billion pounds, 17 percent below the previous year (table 6). In the Pacific Coast (California, Washington, and Oregon), production of Bartlett pears, the variety used mostly for canning and other processing, is expected to be down 18 percent from 1995, and the region's output of other varieties will also be 18 percent smaller. Pacific Coast Bartlett pear output usually accounts for more than 50 percent of U.S. pear production. The expected smaller U.S. pear crop will likely support pear prices received by growers during the 1996/97 marketing season.

Due to more favorable weather conditions, California's 1996 pear crop is forecast 12 percent larger than a year earlier, and is expected to be of good quality. Last year, excessive rains and a hailstorm in June led to a 26-percent smaller crop. While California's 1996 Bartlett pear production is expected to increase 9 percent from 1995, sharply smaller Bartlett crops in Washington (down 47 percent) and Oregon (down 36 percent) will likely offset the increase, reducing Pacific Coast Bartlett output to the smallest since 1970. Cold weather in late winter and poor pollination conditions resulted in reduced yields in Washington and Oregon. Washington will experience its smallest Bartlett crop since 1969. Production of other pear varieties is forecast to be up 50 percent from 1995 in California,

Table 6--Pears: Total production and season-overage price received by growers, 1993-95, and indicated 1996 production

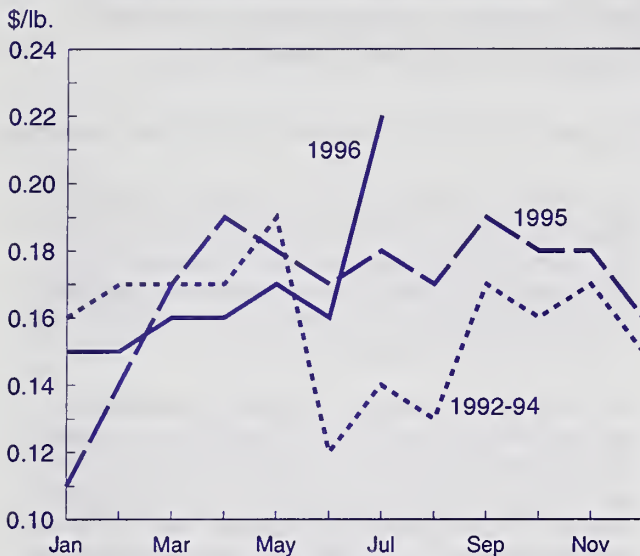
State	Production 1/				Price		
	1993	1994	1995	1996	1993	1994	1995
	-- Million pounds --				-- Cents per pound --		
Pacific Coast:							
California:							
Bartlett	576	666	494	540	11.9	9.2	10.6
Other	40	60	40	60	26.4	14.1	26.9
Total	616	726	534	600	12.8	9.6	11.9
Oregon:							
Bartlett	126	166	140	90	13.0	10.7	12.6
Other	320	350	320	280	10.4	11.0	14.9
Total	446	516	460	370	11.1	10.9	14.2
Washington:							
Bartlett	326	348	360	190	13.5	11.3	11.5
Other	440	436	480	350	11.4	13.3	15.2
Total	766	784	840	540	12.3	12.4	13.6
3 States:							
Bartlett	1,028	1,180	994	820	12.5	10.0	11.2
Other	800	846	840	690	11.7	12.4	15.6
Total	1,828	2,026	1,834	1,510			
Colorado	10	8	6	2	17.4	13.4	17.9
Connecticut	3	3	2	2	30.0	29.0	35.0
Michigan	11	9	11	12	11.3	14.0	14.0
New York	30	32	29	29	13.1	15.2	18.6
Pennsylvania	12	12	13	9	17.5	19.3	18.2
Utah	3	2	2	2	20.0	18.0	23.0
Total	69	66	63	57			
United States							
Bartlett	1,028	1,180	994	820	12.5	10.0	11.2
Other	869	912	903	747	11.7	12.4	15.6
Total	1,897	2,092	1,897	1,567	12.3	11.2	13.4

1/ Includes unharvested production and production not sold.

Source: National Agricultural Statistics Service, USDA.

Figure 6

### U.S. Grower Prices for Fresh Pears



while down 27 percent and 13 percent in Washington and Oregon, respectively.

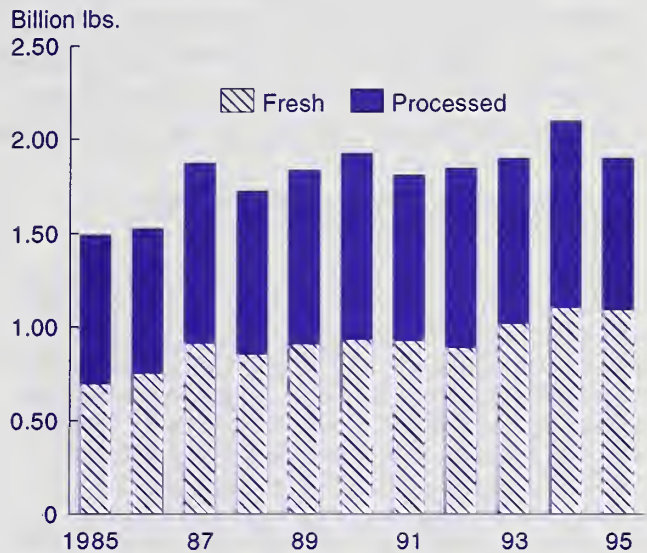
#### **Reduced Fresh and Processing Use, Higher Prices in 1995**

Grower prices for all pears increased 20 percent in 1995/96 as utilized production declined 9 percent, to approximately 1.9 billion pounds. Fresh use decreased 1 percent and amounted to 57 percent of the 1995 pear crop. The 1995/96 season-average price was 16.8 cents a pound for all fresh pears, up from 12.9 cents a year earlier, reflecting lower availability for fresh utilization and strong export demand. At the same time, grower prices for Bartlett fresh pears averaged 70 percent above a year earlier, at 16.0 cents a pound, and grower prices for non-Bartlett fresh pears averaged 19 percent higher, at 16.9 cents a pound.

Forty-three percent of the 1995 U.S. pear crop was used for processing and the quantity processed decreased 18 percent from the previous season, to 806 million pounds. Although Bartlett pears processed from last year's Pacific Coast crop declined 17 percent from the year before, large cannery carryover stocks (both Bartlett and non-Bartlett pears) from the 1994 crop brought processing prices for Bartletts in the region down 9 percent from 1994 to 9.3 cents a pound in 1995. The small 1995 crop, however,

Figure 7

### U.S. Pear Utilization



helped offset the large carryover supplies. According to USDA's *Cold Storage* report, stocks of Bartlett pears were depleted by May 31, 1996 and as of June 30, 1996, 98 percent of total pear stocks at the beginning of the 1995/96 season were gone. A smaller crop in 1996 and continued low carryover stocks from the 1995/96 season will likely support processing pear prices in 1996/97.

#### **Pear Imports and Exports Rise**

From July 1995 through May 1996, the United States imported 119.9 million pounds of fresh pears, 21 percent more than during the same 11 months of 1994/95. Fifty-seven percent of the imports were from Chile, compared with 54 percent the year before. Argentina was also a major supplier.

U.S. fresh pear exports from July 1995 through May 1996 totaled 308.5 million pounds, up 6 percent from a year earlier. Major U.S. markets were Canada (31 percent), Mexico (19 percent), Brazil (16 percent), Taiwan (8 percent), and the European Union (8 percent). Exports were up sharply to each of these countries except Canada and Mexico, which imported nearly 1 percent and 40 percent less, respectively. Reduced production will likely lead to increased U.S. imports of fresh pears in 1996/97, but higher prices are likely to reduce exports.

# U.S. Stonefruit Output Down Slightly in 1996

*Adverse weather has lowered production of peaches, sweet cherries, and tart cherries. This brings the overall U.S. stonefruit output in 1996 down from a year earlier and raises prices for peaches and sweet and tart cherries. Increases in California stonefruits are offset by reduced production in other States.*

## California Peach Output Outpaces 1995, Other States Produce Smaller Crops

California will produce more peaches in 1996, but sharply reduced output in key producing States such as Georgia and South Carolina will lower U.S. peach production 13 percent from last year's 2.3 billion pounds for the smallest crop since 1983 (table 7). USDA also expects peach production to be down in most other States, except Connecticut, Massachusetts, New Jersey, New York, Ohio, Delaware, Colorado, Idaho, Oregon, and Utah. The U.S. freestone peach crop, mostly for fresh use, is forecast at 993.4 million pounds, 31 percent less than in 1995. In contrast, the California clingstone peach crop, mostly for canning, is expected at 1.0 billion pounds, 16 percent larger than last year. Harvest of the clingstone crop started in mid-June, and as of the end of July, was 15 percent complete.

A mixture of weather conditions limited California's production potential in 1996. Below average chilling hours in the winter resulted in lower than normal fruit set. Periods of cold, wet weather during the spring hampered pollination. However, generally good weather later in the season allowed the crop to progress well. Fruit quality and size are generally good. The size for some of the clingstones harvested was even better than expected. The State's total peach output for this year is forecast at 1.62 billion pounds, up 19 percent from 1995's weather-reduced crop, but down 8 percent from 1994. California's freestone output, accounting for about 38 percent of the State's total peach output, is expected to be up 24 percent from a year

ago. Relative to 1994, however, the State's freestone and clingstone crops will likely be down 2 percent and 12 percent. With sharply reduced output in most other States, California's overall peach crop is expected to represent about 81 percent of the U.S. peach crop, up from 59 percent last year, and 70 percent in 1994.

This year, Georgia and South Carolina experienced their smallest peach crops since 1955. Harsh freezes in February and March severely limited fruit set in most of the southeast and central growing areas. The Southern States' share of U.S. peach production dropped from 25 percent in 1995 to only 4 percent in 1996. In Georgia, temperatures dipped as low as 16-18°F on March 9, destroying some early varieties and seriously damaging others. In South Carolina, the extreme cold weather in February damaged dormant buds while the freezes that occurred during March 9-20 brought serious damage to the blooms. Most of the early varieties were devastated and some of the late varieties were seriously damaged. USDA forecasts Georgia's peach production to be down 96 percent from 1995 and South Carolina's output to be down 91 percent.

The 1996 peach crops in most of the States in the Northeast were in good condition. The combined production in New Jersey, New York, and Pennsylvania this year is expected to be up 3 percent from 1995. Freeze damage reduced output in all the north central peach-growing States this year. In Michigan, the forecast 25-percent reduction in this year's crop is not as severe as in 1994 when the State's output declined 74 percent from the previous year.

## Peach Prices Higher

An overall reduction in fresh-market peach output in the United States and strong domestic and export demand are boosting fresh peach prices in 1996. Grower prices for fresh-market peaches in May to July 1996 averaged 66 percent above the same period last year. Fresh peach prices in California are also up despite increased fresh-market deliveries, reflecting a good quality crop and limited supplies from the other States. California represents about 62 percent of the U.S. fresh-market (freestone) crop. According to USDA's Federal-State Market News Service, fresh-market freestone peach prices were \$9.00 per box of 54's-56's (f.o.b. Fresno) on July 26, up about \$1.00 per box at the end of July 1995. Relatively stronger fresh peach prices, compared to last year, are expected for the rest of the season as overall U.S. supplies remain limited.

The California Cling Peach Association (CCPA) estimated that 15 percent more peaches will be delivered to processors this year. On July 11, 1996, CCPA announced that growers with commercial contracts will be paid \$155 per ton (7.75 cents a pound) on deliveries subject to the Sched-

Figure 8

## U.S. Peach Utilization

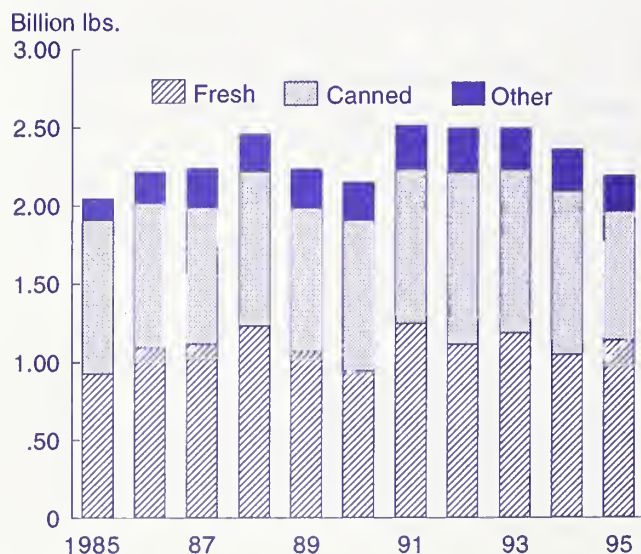


Table 7--Peaches: Total production and season-average prices received by growers, 1993-95, and indicated 1996 production

State	Production				Price		
	1993	1994	1995	1996	1993	1994	1995
	-- Million pounds --				-- Cents per pound --		
Alabama	14	17	22	1	32.9	23.5	28.5
Arkansas	24	8	20	1	14.0	24.5	17.7
California							
Clingstone	1,097	1,130	865	1,000	10.9	9.0	11.0
Freestone	603	634	502	620	14.9	10.7	18.6
Colorado	18	20	17	17	31.1	31.9	49.6
Connecticut	4	2	2	3	52.0	50.0	60.0
Delaware	4	3	2	3	24.0	36.5	38.6
Georgia	150	175	160	6	22.5	18.4	20.3
Idaho	7	4	4	7	24.2	35.1	34.5
Illinois	16	5	13	2	29.9	32.0	33.9
Indiana	8	1/	5	2	35.3	1/	36.1
Kansas	1	1	1	0.4	38.0	26.0	41.0
Kentucky	6	1/	6	2	30.0	1/	32.2
Louisiana	4	4	5	1	48.0	44.0	54.6
Maryland	10	3	12	9	25.5	39.2	30.8
Massachusetts	2	1	1	2	52.0	50.0	70.0
Michigan	57	15	60	45	19.0	22.7	21.0
Missouri	8	5	9	4	24.0	32.0	31.5
New Jersey	90	75	70	80	29.8	32.9	38.5
New York	9	7	12	12	29.6	25.1	20.7
North Carolina	35	33	35	1	20.1	22.4	22.0
Ohio	7	1/	6	7	35.5	1/	42.1
Oklahoma	20	25	30	1/	35.2	29.5	37.0
Oregon	14	16	9	11	24.1	29.8	29.7
Pennsylvania	100	1/	90	85	21.0	1/	27.4
South Carolina	220	250	215	20	16.7	18.8	18.0
Tennessee	10	2	10	0.4	38.0	40.4	35.4
Texas	25	20	24	6	36.0	39.0	36.0
Utah	6	7	6	7	24.0	23.0	25.0
Virginia	28	12	26	16	16.0	22.6	23.0
Washington	47	41	44	10	21.6	21.8	32.3
West Virginia	18	1/	18	15	14.7	1/	22.4
United States	2,660	2,514	2,301	1,993	16.0	13.3	18.6

1/ No significant commercial production due to frost damage.

Source: National Agricultural Statistics Service, USDA.

Table 8--Apricots and nectarines: Total production and season-average price received by growers, 1993-95, and indicated 1996 production

Item and State	Production				Price		
	1993	1994	1995	1996	1993	1994	1995
	-- Million pounds --				-- Cents per pound --		
Apricots--							
California	178.0	290.0	104.0	140.0	18.2	16.6	19.6
Utah	0.5	0.8	1/	0.6	26.3	25.6	
Washington	16.2	15.6	13.0	6.0	38.8	32.0	53.7
United States	194.7	306.4	117.0	146.6	19.9	17.5	23.4
Nectarines--							
California	410	484	352	na	25.0	14.1	26.7

na = Not available.

1/ No significant production due to frost damage.

Source: National Agricultural Statistics Service, USDA.

ule of Values based on offgrade at the time of harvest. The 1996 sliding scale of prices for canning peaches ranges from \$200 a ton (10 cents a pound) to \$242 (12.1 cents). During 1995, the top price was \$213 a ton.

### Increased Apricot Production

This appears to be a better year for apricot production. Total U.S. apricot production is forecast to increase 25 percent from a year ago in 1996 to 146.6 million pounds (table 8). In California, where over 90 percent of the Nation's apricots are produced, output is expected at 140 million pounds, up 35 percent from last year's 104 million pounds, but down from 1994's 290 million. Low chilling hours this winter caused below-average fruit sets and brief periods of cold, wet weather in the spring hampered pollination. Although lighter than average, the fruit set this year was better than last year, when production fell 64 percent from 1994. The 1996 harvest was complete by July 1 and the fruits were reported to be generally of excellent quality and normal sizes, supporting prices. F.o.b. prices for California apricots were about \$17 per 24-pound carton in late June, compared with about \$14 a year earlier.

Production in Utah is expected to recover from last year's frost-damaged crop, with the 1996 output totaling 600,000 pounds. Production in Washington is forecast to reach 6.0 million pounds, 54 percent below last year. Extremely cold temperatures early this winter and a generally cold, damp spring damaged apricot trees and buds in the State, with the heaviest losses in the lower Yakima Valley.

### More California Prunes and Plums

USDA forecast California dried prune production to be up 10 percent from a year ago in 1996 and the largest output since 1989 (table 9). The increase may be attributed to generally favorable weather during the pollination period. Output was reduced 6 percent last year due to poor pollination and flood damage early in the season. The California Tree

Fruit Agreement indicated that California's 1996 plum production will be up about 70 percent from last year's weather-reduced crop. USDA forecasts prune and plum production in Idaho, Michigan, Oregon, and Washington at 38 million pounds in 1996, 17 percent below a year earlier, and the smallest on record. All these States, excluding Idaho, are expected to produce smaller crops. Poor pollination reduced the crop in Michigan and Oregon, while fruit drop was a problem in some growing areas in Washington. Michigan's sharply reduced crop also reflects fewer bearing trees compared to last year.

### Unfavorable Weather Lowers Sweet Cherry Output in 1996

The 1996 U.S. sweet cherry crop was 19 percent smaller than in 1995, reflecting reduced output in Washington (33 percent), Oregon (21 percent), Michigan (19 percent), Pennsylvania (20 percent), and New York (36 percent). Total sweet cherry production is estimated at 266.4 million pounds, the smallest since 1985 (table 10). Blooms of some early varieties in Washington and Oregon were damaged by freezing temperatures in February. Cool, wet spring weather also contributed to poor pollination in both States. In Michigan, poor pollination conditions hurt the prospect of achieving a good crop this year and a May frost damaged fruit buds.

California's sweet cherry production was about 26 percent larger than last year's weather-reduced crop, but 52 percent below 1994's bumper crop. Low chilling hours during the winter limited the production potential of this year's crop. In addition, up to 2 inches of rain during May 15-16 caused some fruit splitting and lowered the quality of cherries, particularly those (mostly Bing cherries) that were scheduled to be harvested by late May. California and Washington grow mostly Bing and other sweet cherry varieties and supply the fresh market, while light-colored sweet cherries from Oregon and Michigan are usually processed. An overall reduction in the availability of fresh-mar-

Table 9--Plums and prunes: Production and season-average price received by growers in principal States, 1993-95, and indicated 1996 production

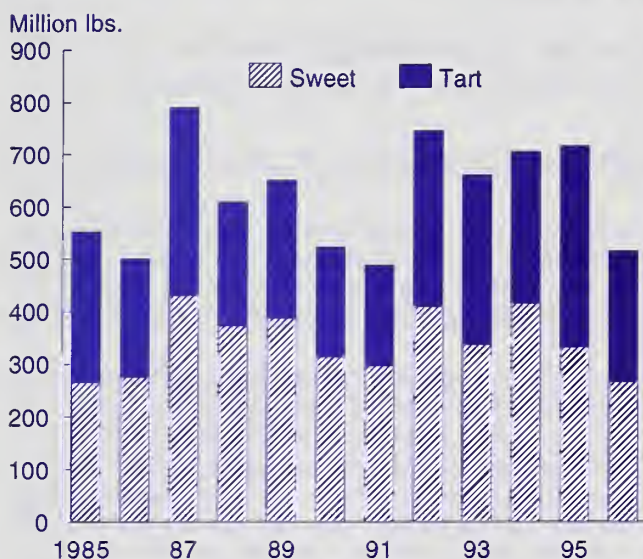
Item and State	Production				Price		
	1993	1994	1995	1996	1993	1994	1995
	-- Million pounds --				-- Cents per pound --		
California:							
Plums	370	494	248	na	25.4	16.1	47.5
Prunes (fresh basis)	750	1,188	1,195	1,264	18.7	17.7	16.0
Total California	1,120	1,682	1,443	na			
Prunes (dried basis)	242	386	362	400	56.0	54.5	52.0
Prunes and plums:							
Idaho	14	9	6	11	8.1	19.4	31.3
Michigan	14	12	16	7	12.2	8.3	12.5
Oregon	9	38	11	10	8.3	6.4	12.1
Washington	19	17	13	10	7.9	7.5	15.8
Total 4 States	56	76	46	38	9.2	8.4	15.9
United States	1,176	1,758	1,489	na			

na = Not available.

Source: National Agricultural Statistics Service, USDA.



Figure 9

**U.S. Cherry Production**

ket sweet cherries supported fresh cherry prices. F.o.b. prices were \$1.30-\$1.60 a pound in June, up from \$1.27-\$1.30 the same time last year, and were about \$1.00 a pound during the first 2 weeks of July, unchanged from a year ago.

**Smaller Tart Cherry Crop in 1996**

Except for Utah, all tart cherry producing States surveyed by USDA's National Agricultural Statistics Service (NASS) are likely to produce smaller crops in 1996. The U.S. tart cherry output is estimated to decline 35 percent from a year ago to 247.9 million pounds (table 11). Production in Michigan, where nearly three-fourths of U.S. tart cherries are grown, is expected to decline 42 percent, to 180.0 million pounds. A prolonged bloom period that hindered proper fruit development, unfavorable weather, and a shortage of bees that resulted in poor pollination may be partly blamed for the State's reduced output. Michigan's share of U.S. tart cherry output is expected to drop from 81 percent in 1995 to 73 percent this year.

Frozen tart cherry stocks as of June 30 amounted to 60.6 million pounds, down 16 percent from a year ago. Relatively low stocks and the reduced crop will likely keep tart cherry prices strong in 1996.

Table 10--Sweet cherries: Total production and season-average price received by growers, 1993-95, and indicated 1996 production

State	Production				Price		
	1993	1994	1995	1996	1993	1994	1995
	-- Million pounds --				-- Cents per pound --		
California	38.0	104.0	39.6	50.0	113.5	61.0	105.0
Idaho	3.0	2.8	1.4	3.6	37.7	72.5	80.5
Michigan	60.0	50.0	54.0	44.0	34.7	29.4	29.1
Montana	1.8	1.5	1.3	1.8	79.5	60.0	67.0
New York	1.4	1.8	2.2	1.4	42.5	42.5	48.0
Oregon	68.0	84.0	76.0	60.0	44.7	36.6	38.3
Pennsylvania	2.4	1.9	2.0	1.6	71.0	92.0	65.0
Utah	2.5	4.6	4.0	4.0	47.9	45.1	43.3
Washington	160.0	164.0	150.0	100.0	62.0	60.0	76.0
United States	337.1	414.6	330.6	266.4	59.5	52.0	63.0

Source: National Agricultural Statistics Service, USDA.

Table 11--Tart cherries: Total production and season-average price received by growers, 1993-95, and indicated 1996 production

State	Production				Price		
	1993	1994	1995	1996	1993	1994	1995
	-- Million pounds --				-- Cents per pound --		
Colorado	1.6	1.5	1.2	1.0	24.9	35.5	41.4
Michigan	270.0	210.0	310.0	180.0	11.4	17.0	5.4
New York	15.7	26.0	32.0	25.0	10.3	12.4	8.1
Oregon	3.0	8.0	1.6	1.5	15.2	15.6	11.3
Pennsylvania	11.5	9.0	9.5	8.5	18.1	26.5	10.7
Utah	15.0	26.5	22.0	25.0	12.8	10.3	4.8
Wisconsin	6.6	9.2	7.7	6.9	9.8	12.7	6.3
United States	323.4	290.2	384.0	247.9	12.1	16.3	6.1

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

## More Strawberries Expected in 1996

*Large gains in California and New Jersey production are compensating for smaller strawberry crops in Florida, Washington, Oregon, and Michigan. A large spring/summer crop will keep fresh-market prices lower.*

### California Strawberry Production Up a Fifth

The 1996 commercial strawberry crop in the six major producing States, California, Florida, Oregon, Washington, Michigan, and New Jersey, is forecast to increase 16 percent from a year earlier, to 1.67 billion pounds (table 12). Large production increases in California and New Jersey will compensate for declines in the other four States. The 1996 winter crop in Florida is forecast down 7 percent from a year ago, reflecting some crop damage from late December freezes, heavy rains in early January, and another freeze in early February. The number of strawberry acres harvested in the State was unchanged from last year's 6,000 acres, but yields were down 7 percent. Spring/summer strawberry production in the five major summer-producing States (California, Oregon, Washington, Michigan, and New Jersey) is forecast to total 1.52 billion pounds in 1996, up 19 percent from a year earlier.

California, by far the largest strawberry-producing State, supplied 83 percent of the U.S. strawberry output in 1995. This year, increased acreage and improved growing conditions are expected to boost production 22 percent from 1995 to 1.45 billion pounds. California growers have 1,600 more acres of strawberries to harvest in 1996 than the year before and yields are forecast to be a record at 57,500 pounds per acre, 14 percent above a year earlier.

The 1996 strawberry crop in Oregon, the second largest producer during the summer season, is forecast at 47.8 million pounds, down 20 percent from a year earlier. The State's crop suffered some root rot problems due to freezes

in February and May and rains just prior to the bloom period. The cool spring weather also restricted fruit size. Harvested area is forecast to be 5,200 acres this summer, 500 acres less than last year, and yields will be 12 percent lower.

Washington's strawberry crop will likely be down 8 percent from a year earlier in 1996 to 9.6 million pounds. A cool, wet spring delayed crop development for about 2 weeks and also caused some root rot and mildew problems. While yields are forecast to remain unchanged from last year's 8,000 pounds per acre, the total number of strawberry acres harvested will likely decrease 100 acres from the 5,700 acres harvested in 1995.

In Michigan, the strawberry crop is forecast to be down 17 percent from 1995. Harvested area is expected to be 1,500 acres, a 300-acre drop from 1995, while average yields are expected to remain unchanged at 6,000 pounds per acre. Cold, spring weather may have contributed to smaller than normal berry sizes and heavy rains in June disrupted harvesting schedules. These weather conditions were also felt in New Jersey, bringing the same effects on berry size and harvesting schedules. The 1996 strawberry crop in New Jersey, however, is expected to increase 60 percent from a year ago, with per acre yields up sharply.

### Increased Supplies Lower Fresh-Market Prices

Increased overall supplies are forcing fresh strawberry prices down in 1996. During the first 7 months of 1996, grower and retail prices averaged 12 percent and 2 percent below the same period last year, respectively. Fresh strawberry shipments, including imports, were up 16 percent from a year ago during the first half of 1996 (table 13). California shipments were up 14 percent. Strawberry harvest in California is year-round, and the heaviest shipments usually run from April through June. An unseasonably warm winter in California accelerated crop development and brought in large early season supplies. Florida's marketing season runs from November through May, with most berries usually shipped in March. Expectations of a larger 1996 U.S. strawberry crop will likely keep fresh strawberry prices below last year for much of 1996. Processing prices, on the other hand, are likely to average unchanged to slightly higher than last year due to low carryover stocks. As of June 30, 1996, stocks of frozen strawberries were 13 percent below the same period last year and season-to-date deliveries of grade-1 freezer berries to processors were down 3 percent on August 10, 1996.

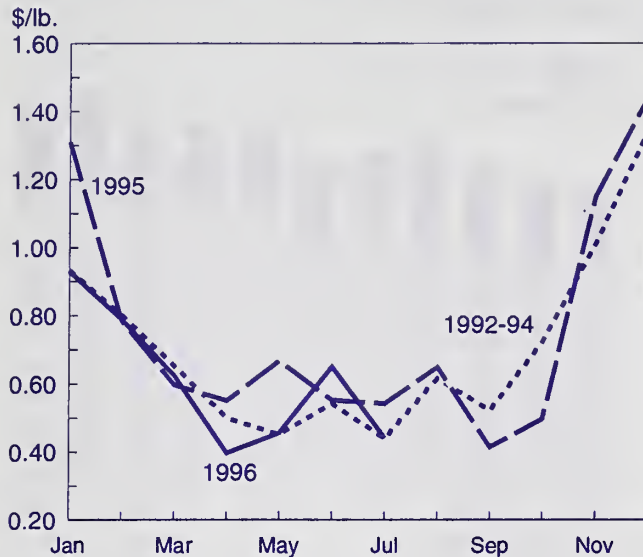
Table 12--U.S. strawberry production, major States, 1992-96

State	1992	1993	1994	1995	1996
-- Million pound --					
Arkansas	0.6	0.7	0.5	1.2	na
California	1,032.0	1,142.1	1,328.1	1,191.8	1,449.0
Florida	162.0	162.4	168.2	168.0	156.0
Louisiana	12.0	11.0	15.4	9.5	na
Michigan	13.2	11.4	9.9	10.8	9.0
New Jersey	2.5	1.8	1.4	1.5	2.4
New York	7.8	16.2	10.4	8.4	na
North Carolina	12.7	10.8	15.6	19.2	na
Ohio	8.5	6.4	6.1	5.0	na
Oregon	61.0	62.0	70.2	59.9	47.8
Pennsylvania	5.9	5.4	6.3	6.4	na
Washington	11.2	11.2	11.2	10.4	9.6
Wisconsin	5.4	5.7	6.1	5.5	na
U.S. total	1,334.8	1,447.1	1,649.4	1,497.6	

na = Not available.

Source: National Agricultural Statistics Service, USDA.

Figure 10

**U.S. Grower Prices for Fresh Strawberries****Imports from Mexico To Decrease**

Over 90 percent of U.S. strawberry imports come from Mexico. Mexico's strawberry production is forecast to decrease to a more normal level in 1995/96 with a corresponding drop in shipments to the United States. The smaller Mexican crop and likely higher fresh-market grower prices will likely lower Mexican exports of frozen strawberries, leading to an overall decrease in strawberry shipments into the United States. Mexico's 1995/96 crop was harvested from November 1995 through June 1996. U.S. imports of frozen strawberries from Mexico totaled 62.3 million pounds from January through the week ending July 20, 1996, compared to 82.4 million the same time last year. On the other hand, fresh strawberry shipments from Mexico totaled 60.4 million pounds from January through June, compared to 53 million a year earlier. U.S. imports of fresh strawberries from all foreign sources totaled 59.8 million pounds from January to May, up 31 percent from a year earlier, while imports of frozen strawberries totaled 44.4 million pounds, down 28 percent.

U.S. strawberry exports through much of the first half of 1996 increased 23 percent from a year earlier as exports of

Table 13—Fresh strawberry shipments in the United States, monthly, by source, 1991-96

Source/year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
Million pounds													
<b>California</b>													
1991	2.7	14.8	33.2	163.4	172.7	133.8	95.0	68.3	57.6	38.2	12.1	3.7	795.5
1992	6.7	16.9	52.1	187.5	175.5	102.5	85.7	49.5	47.2	33.8	5.2	1.5	764.1
1993	3.5	11.6	61.4	149.3	158.6	123.2	93.0	69.0	64.9	31.9	46.2	1.2	813.8
1994	13.7	20.1	68.7	172.8	177.3	138.7	108.3	90.4	69.8	40.6	8.2	0.8	909.4
1995	0.6	17.2	46.8	149.7	159.5	145.0	114.1	77.8	70.3	46.7	11.3	1.4	840.4
1996	16.3	25.9	73.0	184.6	201.4	88.6							
<b>Florida</b>													
1991	9.6	11.3	23.2	3.2	0.1	--	--	--	--	--	0.4	6.2	54.0
1992	8.4	16.1	26.4	8.3	0.3	--	--	--	--	--	0.4	4.1	64.0
1993	10.5	8.5	24.7	7.4	2.5	--	--	--	--	--	0.3	4.0	57.9
1994	7.5	13.2	33.0	2.8	--	--	--	--	--	--	0.4	3.0	59.9
1995	4.7	5.4	23.0	4.1	--	--	--	--	--	--	0.1	5.1	42.4
1996	5.9	6.7	33.7	7.9	0.1	--	--	--	--	--			
<b>Mexico</b>													
1991	3.1	5.4	4.3	5.2	3.9	3.1	0.5	--	--	--	1.3	2.1	28.9
1992	1.8	2.1	5.3	4.8	1.9	0.7	0.1	--	--	--	0.7	1.8	19.2
1993	2.3	2.3	9.0	5.6	4.7	2.2	--	--	--	--	0.3	1.6	28.0
1994	3.2	3.4	11.6	12.8	5.5	4.5	0.2	--	--	0.1	0.8	1.9	44.0
1995	3.2	5.3	12.3	11.6	11.5	8.4	0.7	--	--	0.1	0.8	1.5	55.4
1996	3.8	7.6	13.6	20.6	13.1	1.7							
<b>Total</b>													
1991	15.4	31.5	60.7	171.8	176.7	136.9	95.5	68.3	57.6	38.2	13.8	12.0	878.4
1992	16.9	35.1	83.8	200.6	177.7	103.2	85.8	49.5	47.2	33.8	6.3	7.4	847.3
1993	16.3	22.4	95.1	162.3	165.8	125.4	93.0	69.0	64.9	31.9	46.8	6.8	899.7
1994	24.4	36.7	113.3	188.4	182.8	143.2	108.5	90.4	69.8	40.7	9.4	5.7	1013.3
1995	8.5	27.9	82.1	165.4	171.0	153.4	114.8	77.8	70.3	46.8	12.2	8.0	938.2
1996	26.0	40.2	120.3	213.1	214.6	90.3							

-- No shipments reported.

Source: Agricultural Marketing Service, USDA.

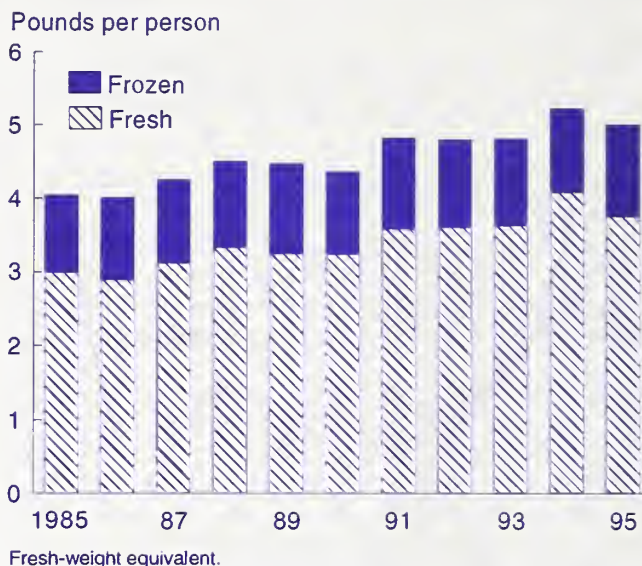
fresh strawberries rose 37 percent to 60.6 million pounds. In contrast, frozen strawberry exports declined 7 percent to 20.5 million pounds. In 1995, total strawberry exports fell 13 percent from a year earlier. Canada was the largest market for U.S. fresh strawberry exports in 1995, accounting for 73 percent of the total, followed by Japan, Mexico, and the United Kingdom. Japan continued to receive the largest share of U.S. frozen strawberry exports, about 67 percent of the 1995 total, compared to Canada's 19 percent.

The United States also exports small quantities of strawberries to Mexico from July through November. Under the NAFTA, U.S. strawberry exports to Mexico are no longer subject to a duty and likewise for Mexican strawberry exports to the United States. Exports to Mexico from non-NAFTA countries are charged a 20-percent import tax.

**Fresh Consumption Expected Up in 1996, Frozen Consumption Down**

U.S. fresh strawberry consumption will likely increase in 1996 as fresh-market supplies are expected to be up from a year ago and average prices are likely lower. During 1995, Americans consumed about 3.76 pounds of fresh strawberries, second only to 1994's 4.09 pounds. On a fresh-weight equivalent, Americans also consumed 1.25 pounds of frozen strawberries in 1995 (1.41 pounds per person on a product-weight equivalent), up from 1.14 pounds in 1994, and second only to 1971's 1.27 pounds. The frozen strawberry pack reported by the American Frozen Food Institute

Figure 11  
**U.S. Strawberry Consumption**



decreased as well last year, but large beginning stocks and reduced exports increased the availability of frozen strawberries for domestic consumption. This year, U.S. consumption of frozen strawberries will likely drop due to lower processing supplies.

# Blueberry Production Plummet in 1996

*U.S. blueberry production will likely decrease 21 percent in 1996, with smaller crops in all producing States except New Jersey, Washington, and Oregon. Decreased supplies of fresh and frozen blueberries will likely bolster prices.*

## Unfavorable Weather Lowers Production of Cultivated Blueberries

Blueberry supplies are expected to be lighter this summer, likely pushing U.S. blueberry grower prices higher than the 63.7 cents a pound achieved in 1995 (table 14). A very cold winter followed by a cold, wet spring slowed crop growth in Michigan and New Jersey, the two major producers of cultivated blueberries. High temperatures during the summer of 1995 also put Michigan's crop under stress and affected early bud development of the 1996 crop. Michigan's 1996 blueberry crop is expected to be down sharply from last year, while New Jersey's output will likely be unchanged (table 15). Other States producing cultivated blueberries are also forecast to produce smaller crops in 1996, except for Oregon and Washington where production is expected to be up. Freezing temperatures earlier in the year slowed growth and damaged some early varieties in Florida, Georgia, and North Carolina. Preliminary estimates from the North American Blueberry Council put the U.S. blueberry crop in 1996 at 177.1 million pounds, down 19 percent from a year ago.

Table 14--Blueberry prices received by growers, 1993-95

Use and state	1993	1994	1995
	Cents per pound		
All Uses:			
Michigan	39.8	53.6	49.9
New Jersey	79.4	73.7	75.7
North Carolina	89.0	92.5	92.8
Oregon	54.8	51.8	49.3
Washington	50.7	48.2	49.1
U.S. average	55.6	66.4	63.7
Fresh:			
Michigan	75.0	74.0	75.0
New Jersey	87.0	86.0	88.0
North Carolina	109.0	105.0	105.0
Oregon	80.5	73.0	71.0
Washington	78.0	62.0	77.0
U.S. average	87.9	90.2	90.4
Processed:			
Michigan	30.0	44.0	40.0
New Jersey	55.0	49.0	45.0
North Carolina	34.1	42.6	39.0
Oregon	34.0	34.0	33.0
Washington	39.0	42.0	38.0
U.S. average	32.7	42.9	40.0

Source: National Agricultural Statistics Service, USDA.

Table 15--North American blueberry production, 1993-96

State of Province	1993	1994	1995	1996F
	Million pounds			
Cultivated: 1/				
Michigan	87.0	47.0	67.0	34.0
New Jersey	31.5	31.5	35.0	35.0
British Columbia	18.3	23.0	30.0	25.0
Oregon	14.5	17.5	14.0	16.0
North Carolina	15.0	15.0	13.0	10.5
Washington	6.7	8.7	6.3	7.0
Georgia	5.5	7.5	13.0	4.0
Indiana	2.8	2.7	3.8	3.0
Other	4.7	6.6	5.9	2.6
Total 2/	186.0	160.5	189.1	138.1
U.S.	167.7	136.5	158.0	112.1
Wild:				
Maine	64.6	59.5	66.2	65.0
Nova Scotia	30.9	27.2	30.2	27.0
Quebec	23.3	16.0	16.3	17.0
New Brunswick	7.2	10.3	9.0	11.0
Newfoundland and Prince Edward Island	2.8	4.0	1.5	1.5
Total	128.8	117.0	124.8	123.0
Total U.S.	232.3	196.0	224.2	177.1

F = Forecast from the North American Blueberry Council.

1/ Cultivated blueberry production from 1993-95 represent utilized production reported by USDA's National Agricultural Statistics Service, except for British Columbia.

2/ Includes Ontario.

Sources: National Agricultural Statistical Service, USDA and the North American Blueberry Council (Maine and Canada).

## Fresh Use and Processed Use Drops

Industry sources have indicated that fresh use of the 1996 U.S. blueberry crop is expected to decline about 27 percent from a year ago. Fresh-market production in New Jersey, the largest source of fresh blueberries, is expected to decline about 8 percent from 1995 and provide about 42 percent of U.S. fresh-market use. Harvesting usually begins in June and peaks around mid-July (table 16). Michigan's fresh-market output is expected to be about 53 percent of last year's level, and account for about 18 percent of U.S. fresh-market use. Last year, the USDA estimate for fresh use of U.S. cultivated blueberries was 74.4 million pounds, up 9 percent from 1994. Despite the increase, the average price received by growers for fresh-market cultivated blueberries last year was about unchanged from a year earlier at 90 cents a pound.

Frozen blueberry supplies in 1996 will be limited by expected smaller crops in Michigan, Maine, and most of the Canadian provinces. Preliminary estimates suggest that processed use of the 1996 U.S. blueberry crop (both from

cultivated and wild varieties) will decrease about 18 percent from a year ago and account for about 69 percent of total blueberry supplies. Maine's production of wild blueberries, mostly for freezing, is projected to be 65.0 million pounds, down 2 percent from 1995. In Michigan, processors are expecting a 50-percent reduction in processing use. The total Michigan crop is expected to be 34 million pounds, with 71 percent going to the processing sector. Shipments of Michigan blueberries typically begin in early

July and last through September or, sometimes, into early October. Reduced blueberry supplies, lower stocks, and continued strong export demand are likely to put some upward pressure on prices paid by processors for blueberries intended for processing. USDA reported that U.S. stocks of frozen blueberries on July 1, 1996, were 27 percent below a year earlier. During January-May 1996, U.S. exports of frozen blueberries totaled 11.7 million pounds, up 31 percent from a year earlier.

Table 16—U.S. blueberry shipments, monthly, 1991-96

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Million pounds													
All 1/													
1991	0.2	0.1	0.1	--	4.2	11.1	21.2	21.9	1.9	--	--	--	60.7
1992	0.2	0.2	0.1	0.1	1.1	6.8	16.5	20.3	3.5	1.0	0.8	0.2	50.8
1993	0.3	0.1	--	--	1.5	12.2	22.9	25.6	3.2	--	--	0.2	66.0
1994	0.3	0.3	0.1	0.8	6.7	12.5	24.7	23.6	1.7	0.1	--	0.2	71.1
1995	0.7	0.2	0.2	0.2	6.5	12.2	32.7	23.1	2.6	0.1	--	0.3	78.8
1996	0.6	0.3	0.0	0.0	3.3	13.1	--	--	--	--	--	--	--
Florida													
1991	--	--	--	--	0.3	0.2	--	--	--	--	--	--	0.5
1992	--	--	--	0.1	0.6	0.2	--	--	--	--	--	--	0.9
1993	--	--	--	--	0.1	--	--	--	--	--	--	--	0.1
1994	--	--	--	0.8	1.0	--	--	--	--	--	--	--	1.8
1995	--	--	--	0.2	1.2	0.1	--	--	--	--	--	--	1.5
1996	--	--	--	--	0.4	0.3	--	--	--	--	--	--	--
North Carolina													
1991	--	--	--	--	3.9	3.5	--	--	--	--	--	--	7.4
1992	--	--	--	--	0.5	6.1	0.1	--	--	--	--	--	6.7
1993	--	--	--	--	1.4	8.8	0.8	--	--	--	--	--	11.0
1994	--	--	--	--	6.8	7.6	0.5	--	--	--	--	--	13.9
1995	--	--	--	--	5.3	7.0	0.4	--	--	--	--	--	12.7
1996	--	--	--	--	2.9	7.3	--	--	--	--	--	--	--
New Jersey													
1991	--	--	--	--	--	6.6	13.8	0.4	--	--	--	--	20.8
1992	--	--	--	--	--	0.4	10.1	2.5	--	--	--	--	13.0
1993	--	--	--	--	--	3.4	15.2	2.1	--	--	--	--	20.7
1994	--	--	--	--	--	4.9	15.1	1.1	--	--	--	--	21.1
1995	--	--	--	--	--	4.9	21.0	2.4	--	--	--	--	28.3
1996	--	--	--	--	--	5.5	--	--	--	--	--	--	--
Michigan													
1991	--	--	--	--	--	0.8	7.3	3.2	0.1	--	--	--	11.4
1992	--	--	--	--	--	--	2.2	5.7	1.9	0.1	--	--	9.9
1993	--	--	--	--	--	--	6.0	10.9	1.7	--	--	--	18.6
1994	--	--	--	--	--	--	6.6	7.2	1.4	--	--	--	15.2
1995	--	--	--	--	--	--	6.4	9.1	1.4	--	--	--	16.9
1996	--	--	--	--	--	--	--	--	--	--	--	--	--

-- = No shipments reported.

1/ Includes imports from Canada, Chile, and New Zealand.

Source: Agricultural Marketing Service, USDA.

## California's Kiwifruit Production To Expand

*Hot and windy weather destroyed some blooms in May but growers still anticipate a good crop in 1996. Increased production could weaken prices. Warm, wet weather during the pollination period reduced kiwifruit production in 1995, but grower prices averaged lower as U.S. supplies were up due to imports.*

Preliminary estimates from the California Kiwifruit Commission indicate a slightly larger California kiwifruit crop in 1996. If realized, increased production could weaken grower prices. Fruit size is expected to be smaller than normal partly due to the heavy fruit set. Grown mostly in northern California, kiwifruit is harvested in October and November, and marketed through the following May. Grower concerns about the lack of chilling hours this winter were mitigated by excellent blooms. The potential for a much larger crop, however, was tempered by hot and windy conditions last May that destroyed some blossoms.

### California Output Curtailed in 1995

During 1995, California's kiwifruit production decreased for the third straight year, partly due to warm, wet weather during the pollination period and a 4-percent decrease in bearing acreage. Production declined 4 percent from 1994 to 76.0 million pounds (table 17). In spite of reduced domestic output, fresh kiwifruit average grower prices declined 4 percent to 23.7 cents per pound (\$473 per ton), partly reflecting a 1-percent increase in world kiwifruit supplies during the 1995/96 marketing year and increased imports. Hence, the total value of the crop was down 18 percent from 1994, at \$15.1 million.

### Imports Increase, Exports Decrease

The United States continued to be a net importer of kiwifruit in 1995, with imports totaling 83.5 million pounds

and exports reaching 17.5 million pounds. After declining since 1991, U.S. kiwifruit imports increased for the second consecutive year in 1995, and were up 33 percent from 1994. Increased imports compensated for the decline in domestic production, keeping U.S. kiwifruit supplies in 1995 about unchanged from a year earlier. Domestic consumption rose slightly from 0.503 pounds per person in 1994 to 0.514 pounds in 1995.

Kiwifruit imports to the United States start around April and end in October when the California season begins. Shipments come mainly from Chile, New Zealand, and Italy (table 18). Chile became the leading supplier in 1992 when anti-dumping action against New Zealand was implemented. Chile shipped 89 percent of total U.S. kiwifruit imports in 1995, up from 87 percent in 1994, and up 11 percent from 1991. New Zealand accounted for nearly 9 percent of total imports, down from 10 percent in 1994, and down from 88 percent in 1991. Imports from Italy, the world's largest producer and exporter of kiwifruit, have averaged about 3 percent of the U.S. market since 1993 as its shipments coincide with California's season. Imports in 1995 from the three countries rose 35 percent, 15 percent, and 42 percent, respectively, from a year earlier.

U.S. kiwifruit exports dropped 15 percent from a year earlier in 1995 and accounted for 11 percent and 25 percent of U.S. kiwifruit supplies and California shipments, respectively. Major markets were Canada, Taiwan, and Korea.

Table 17—California kiwifruit: Acreage, production, and value, 1991-95

Year	Bearing acreage Acres	Total production Million pounds	Price 1/ Cents per pound	Value 2/ 1,000 dollars
1991	7,300	59.2	41.0	21,976
1992	7,300	104.6	14.5	13,833
1993	7,200	98.4	18.5	16,502
1994	6,900	78.8	24.6	18,413
1995	6,600	76.0	23.7	15,089

1/ Season-average grower price. 2/ Value is based on utilized production.  
Source: National Agricultural Statistics Service, USDA.

Table 18—U.S. imports of fresh kiwifruit, by country, 1991-95

Source	1991	1992	1993	1994	1995
	1,000 pounds				
Chile	6,828	27,141	42,871	54,778	74,002
New Zealand	56,533	16,435	10,542	6,360	7,341
Italy	505	1,036	1,863	1,550	2,202
Other countries	71	0	2	91	2
World	63,936	44,613	55,279	62,779	83,548

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

## Banana Imports and Domestic Production Down

*U.S. banana supplies in 1996 will likely be down from last year. Reduced domestic supplies and higher prices in 1995 led to a slight decline in domestic consumption from 1994's record level.*

Hawaii's banana production in 1996 will likely decline from last year's 13.0 million pounds. Tropical storms during February and March damaged some plantations and forced some banana acreage out of production. According to the Hawaii Department of Agriculture, production totaled 5.9 million pounds during the first 7 months of 1996, 14 percent below the same period last year. During 1995, production also declined 5 percent from a year earlier due to weather. It was dry for most of the first half of 1995, particularly in the major Cavendish orchards. Harvested acreage in 1995 remained unchanged from a year ago, but yields were lower. The 2-year dip in production, however, is only a temporary trend. Banana production this August is forecast to be up 19 percent from July and 25 percent from August 1995. In addition, new acreage is being planted in stages. By late 1997, planted acreage is expected to increase 40 to 50 percent from a year ago. Given favorable growing conditions, domestic banana production will likely be up in the next few years.

Imports continue to account for a majority of U.S. banana supplies, with most of the shipments coming from Central America (principally Costa Rica, Guatemala, Honduras, and Panama) and South America (mainly Colombia, Ecuador, and Venezuela). U.S. banana imports totaled 8.077 billion pounds in 1995 while Hawaii's production was 13.0 million pounds. In volume terms, Costa Rica, Ecuador, Honduras, Guatemala, and Colombia were the five leading sources of U.S. banana imports during 1995, accounting for 92 percent of all banana shipments into the United States that year. Costa Rica provided 26 percent of the imports, Ecuador 25 percent, and the other three countries 16, 13, and 12 percent, respectively.

U.S. banana imports in 1995 were down 1 percent from 1994 (table 19). Shipments in 1995 were up from the five major sources except from Costa Rica (down 2 percent) and Colombia (down 30 percent). Some banana plantations in Costa Rica were eliminated after a high occurrence of black sigatoka in 1994 that caused the lowest yields in the last 10 years. In Colombia, financial difficulties continue to plague the banana industry, particularly in Uraba, the principal export banana producing area. From January through May 1996, U.S. banana imports were virtually unchanged from the same period in 1995. Increased imports from Costa Rica and Honduras during this 5-month period in 1996 were offset by reduced shipments from the other three major exporting countries.

Banana retail prices from January through July 1996 averaged 50.2 cents a pound, compared with 49.8 cents a year ago. Banana prices usually peak between February and May and then drop seasonally as summer fruits become available. The same level of imports and tight supplies of domestic stone fruit and pears will help support banana prices during the remainder of 1996. However, larger supplies of fresh-market apples (with generally small fruit size) this fall will likely offset some of the strength in banana prices. Banana retail prices in 1995 averaged higher than a year earlier as domestic supplies declined 1 percent from 1994. Domestic consumption in 1995 dropped from the record 28.1 pounds per person in 1994 to 27.4 pounds. Despite the drop, bananas are still the most popular fruit in the United States, followed by apples and oranges. Domestic consumption of fresh apples during 1995 was about 19 pounds per person, while for oranges was about 14 pounds.

Table 19--U.S. Imports of bananas, excluding plantains, by country, 1988-95

Year	Costa Rica	Ecuador	Colombia	Honduras	Guatemala	Mexico	Other	World
Million pounds								
1988	1,312.0	1,669.6	985.1	1,339.7	467.3	182.1	380.0	6,335.9
1989	1,404.6	1,873.1	939.7	1,216.3	535.2	208.5	260.3	6,437.6
1990	1,260.1	2,518.0	787.7	1,070.6	733.5	334.7	116.8	6,821.4
1991	1,513.1	2,458.1	1,000.8	917.8	649.8	475.0	104.2	7,118.8
1992	2,104.3	1,975.9	917.2	905.4	842.8	873.1	166.3	7,785.0
1993	2,033.8	1,678.5	1,314.7	940.6	832.9	679.8	264.9	7,745.1
1994	2,154.1	1,732.6	1,387.8	1,096.2	969.9	422.6	380.5	8,143.8
1995	2,112.3	2,053.7	969.0	1,284.7	1,021.5	343.2	292.9	8,077.3

Source: Foreign Agricultural Service, U.S. Department of Agriculture.



# Imports Continue To Boost Tropical Fruit Supplies

*U.S. mango and papaya supplies are likely to be up in 1996. Mango and papaya imports increased in 1995, raising U.S. supplies above a year earlier and consumption to a new record. Pineapple supplies were down due to a continued decline in Hawaii's production and lower imports of fresh and canned pineapples. Pineapple consumption was down except for juice.*

## Florida To Produce an Average Mango Crop in 1996

Florida will likely harvest an average mango crop in 1996, but total production may be slightly smaller than in 1995. According to the Florida Agricultural Statistics Service, cold weather caused some blooms to drop during March, but most mango trees produced a fairly good set of second blooms. Harvest has been abundant thus far. Mango orchards in Florida begin to bloom in March and are harvested from June through August.

Florida's mango production increased for the second consecutive year in 1995, after declining sharply in 1993 due to serious damage from Hurricane Andrew in August 1992. Florida harvested 8.2 million pounds of mangoes in 1995, 50 percent more than in 1994, reflecting higher yields. However, the 1995 output only accounted for about 38 percent of pre-hurricane levels in 1992. Bearing acreage dropped 13 percent and the number of bearing trees declined 9 percent from a year earlier. Increased production lowered the 1995 season-average grower price to 20.9 cents a pound, down from 27.3 cents in 1994, and down 18 percent from the 1990-94 average. The sharp increase in production, however, was enough to offset the price decline, and raised the total value of the crop to \$1.7 million, up 15 percent from a year ago.

## Mango Imports Are Record High

U.S. fresh mango imports from January through May 1996 totaled 174.7 million pounds, up 36 percent from a year ago. Imports from Mexico were up 48 percent and accounted for about 76 percent of the total. Shipments from Mexico are usually the highest during April through August. Continued increased imports in 1996 will likely put some downward pressure on wholesale prices and could set a new record for domestic mango consumption.

Record large imports of fresh mangoes in 1995 helped to increase domestic consumption from 0.98 pounds per person in 1994 to a 1.13 pounds—a record. Fresh mango imports in 1995 made up 97 percent of U.S. supplies. Imports rose 14 percent from 1994 and were valued at \$122.5 million. Mexico supplied 81 percent of U.S. mango imports last year (table 20), with the volume up 6 percent from a year earlier, and Mexico's largest exports to the United States since the 1970's. Haiti, Guatemala, Peru, Brazil, Venezuela, and Ecuador were the other leading suppliers, each providing at least a million pounds. Imports rose from each of these six countries, except Venezuela, whose shipments were down 38 percent from the year before.

Figure 12

## U.S. Fresh Mango Supply

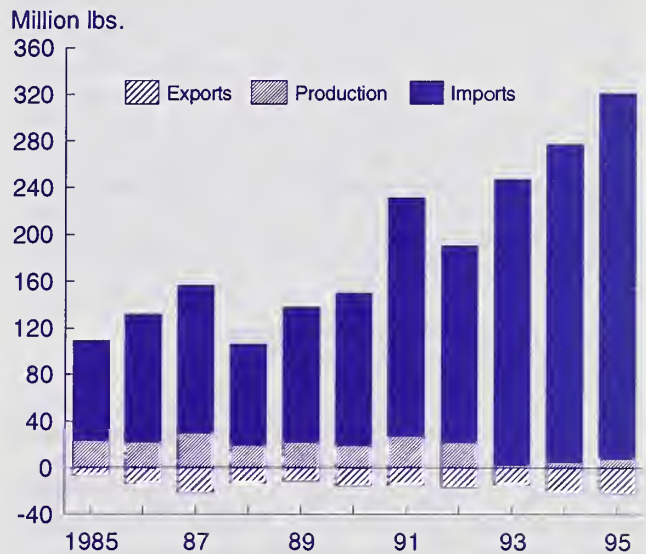


Table 20—U.S. imports of fresh mangoes, by country, 1991-95

Country	1991	1992	1993	1994	1995
	1,000 pounds				
Mexico	168,612	151,083	211,135	241,038	256,294
Peru	481	6,698	6,063	7,862	8,505
Venezuela	1,638	5,831	6,259	7,410	4,621
Haiti	29,923	611	18,441	8,417	22,077
Guatemala	33	0	1,393	5,258	12,833
Brazil	2,282	3,772	6,973	4,859	6,515
Ecuador	291	822	730	1,933	3,285
Leeward and Windward Islands	24	75	161	97	117
Dominican Republic	335	183	302	384	287
Costa Rica	37	49	82	185	150
Other countries	368	115	157	536	1,907
World	204,024	169,238	251,696	277,978	316,589

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

## Hawaii's Papaya Production Continues To Decline

Hawaii's papaya production in 1996 is expected to decline from a year ago, due partly to the effects of tropical storms. Also, the papaya ring spot virus remains a problem in major production areas, causing lower yields and increased tree losses. Harvested acreage and fresh production have averaged 4 percent and 14 percent below a year ago, respectively, during the first 7 months of 1996. Grower prices for fresh papayas, however, have averaged 45.2

cents a pound from January through May, compared with 59.7 during the same period last year.

Hawaii's papaya production decreased 18 percent from a year earlier to 50.8 million pounds in 1995, the lowest since 1980's 48.9 million pounds. Acres harvested expanded 11 percent from 1994, but yields were 26 percent lower. Variable weather throughout the year could be blamed for the State's production performance, but heavy losses in major producing areas were mostly due to the papaya ring spot virus.

During 1995, 82 percent of production entered the fresh market, and the remainder was processed. Fresh-market production decreased 25 percent from a year earlier while processed use increased 53 percent. The decline in fresh-market output drove fresh-market grower prices sharply higher last year, bringing the season-average grower price for all papayas up 63 percent from 1994. At the same time, grower prices paid by processors in 1995 remained unchanged from the year before. Even with the large decline in total output, the sharp rise in grower prices helped raise the total value of last year's crop to \$18.5 million, 34 percent above the previous year.

### **Growth in Imports Compensates Dip in Hawaii's Papaya Output**

U.S. fresh papaya imports are expected to continue to increase in 1996, offsetting some of the declines in domestic production. Imports have consistently increased over the last 8 years and have accounted for a rising share of total papaya supplies. Cumulative U.S. imports of fresh papayas during the first 5 months of 1996 totaled 52.8 million pounds, up 70 percent from a year ago. During 1995, imports were a record at 73.4 million pounds, up 78 percent from 1994, and accounted for 64 percent of U.S. fresh papaya supplies. Increased papaya imports, mainly from Mexico, and reduced exports raised fresh papaya consumption to a record 0.37 pounds per person in 1995, 23 percent above 1994. Mexico shipped 67.2 million pounds of papaya

Table 21—U.S. imports of fresh papayas, by country, 1991-95

Country	1991	1992	1993	1994	1995
1,000 pounds					
Mexico	8,927	18,615	21,533	32,997	67,154
Belize	82	1,347	4,297	3,957	1,440
Jamaica	720	2,324	4,509	2,590	3,461
Costa Rica	0	4	11	796	20
Dominican Republic	521	768	683	787	1,250
Haiti	0	0	250	18	13
Thailand	111	35	10	13	2
Bahamas	2,969	0	0	0	31
Other countries	49	0	8	22	16
<b>World</b>	<b>13,378</b>	<b>23,094</b>	<b>31,301</b>	<b>41,180</b>	<b>73,387</b>

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

to the United States in 1995, 92 percent of total U.S. papaya imports (table 21). U.S. exports of fresh papayas amounted to 17.3 million pounds, down 5 percent from 1994.

### **Pineapple Production Continues Long-Term Decline**

Hawaii's pineapple production declined for the eighth consecutive year in 1995, totaling 690 million pounds, 5 percent smaller than in 1994. The long-term decline in the State's production may be attributed to increased industry pressure from foreign competition, rising production costs, a tight labor situation, and nonagricultural land use. Hawaiian pineapple production may continue to decline if these factors continue to plague the industry. Acreage harvested, which declined each year from 1987 to 1993, was again below a year earlier, dropping from 22,300 acres in 1994 to 20,800 acres.

Fresh use of Hawaii's 1995 pineapple crop decreased to 250 million pounds, about 4 percent less than in 1994 while processed use dropped to 440 million pounds, down 6 percent. Decreased domestic output contributed to stronger grower prices in 1995, raising the value of Hawaii's crop to \$87.4 million, from \$78.9 million in 1994. The 1995 season-average grower price for all pineapples was 12.7 cents per pound, 17 percent higher than the previous year, with fresh-market prices up 23 percent and processing prices up 3 percent.

### **Lower Fresh and Canned Pineapple Imports, Consumption Down**

U.S. fresh pineapple imports declined 6 percent from a year earlier during the first 5 months of 1996. Despite reduced production last year, U.S. fresh pineapple imports totaled 274.7 million pounds, down 5 percent from 1994 (table 22). Imports came mainly from Costa Rica, Honduras, and Mexico. During the past several years, duty-free status, established in the Caribbean Basin Initiative in 1983, encouraged more imports from Central American and Caribbean countries. However, imports from the Dominican Republic in 1995, previously the third largest supplier of fresh pineapples to the United States and the largest among the Caribbean countries, declined 67 percent from the prior year. Tight U.S. supplies and higher prices lowered domestic consumption, from 2.04 pounds of fresh pineapples per person in 1994 to 1.93 pounds in 1995.

Figure 13

### **U.S. Fresh Papaya Supply**

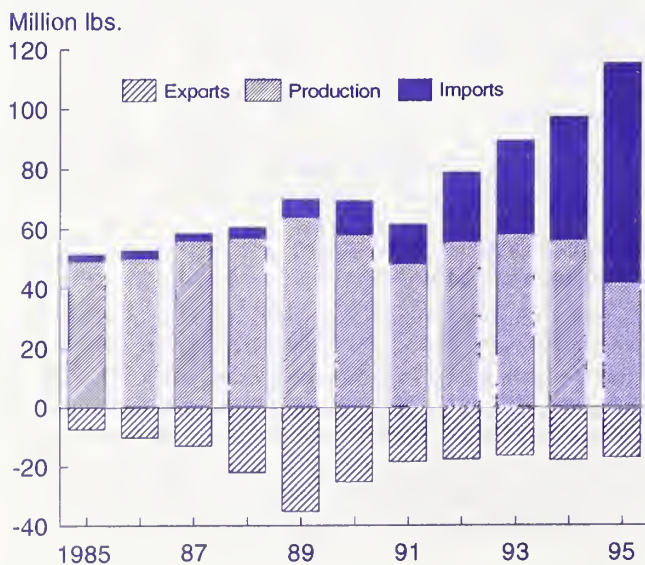


Table 22--U.S. imports of fresh and frozen pineapple, 1993-95

Source	1993	1994	1995
1,000 pounds			
Costa Rica	161,718	185,350	172,995
Honduras	58,857	63,977	73,378
Dominican Republic	38,610	23,393	7,491
Mexico	17,150	13,148	13,598
Thailand	5,977	6,777	4,001
Guatemala	681	750	1,204
Indonesia	518	419	0
Panama	57	298	93
Colombia	218	11	7
Hong Kong	851	0	326
Other countries	110	467	5,694
<b>World</b>	<b>284,747</b>	<b>294,590</b>	<b>278,787</b>

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

Table 23--U.S. imports of canned pineapple, 1993-95

Source	1993	1994	1995
1,000 pounds			
Thailand	379,243	339,953	219,503
Philippines	283,219	284,617	274,702
Indonesia	42,091	53,815	61,583
Japan	29,262	27,421	52,231
Malaysia	5,529	11,742	18,342
Singapore	6,773	5,199	2,050
Mexico	8,247	4,969	3,942
Costa Rica	295	3,770	3,380
Hong Kong	412	1,949	1,938
Honduras	1,032	875	626
Dominican Republic	2,013	518	2
Taiwan	840	104	1,153
Other countries	2,978	5,218	15,516
<b>World</b>	<b>761,934</b>	<b>740,149</b>	<b>654,969</b>

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

Table 24--U.S. imports of pineapple juice, 1993-95

Source	1993	1994	1995
1,000 gallons, sse			
Philippines	37,689	36,795	43,718
Thailand	41,768	27,121	30,440
Indonesia	871	3,423	3,951
Japan	2,536	2,500	3,529
Costa Rica	2,859	1,874	1,780
Dominican Republic	1,437	729	141
Honduras	984	112	48
Mexico	220	94	523
Brazil	79	52	0
Hong Kong	43	27	230
Other countries	515	486	659
<b>World</b>	<b>89,000</b>	<b>73,213</b>	<b>85,019</b>

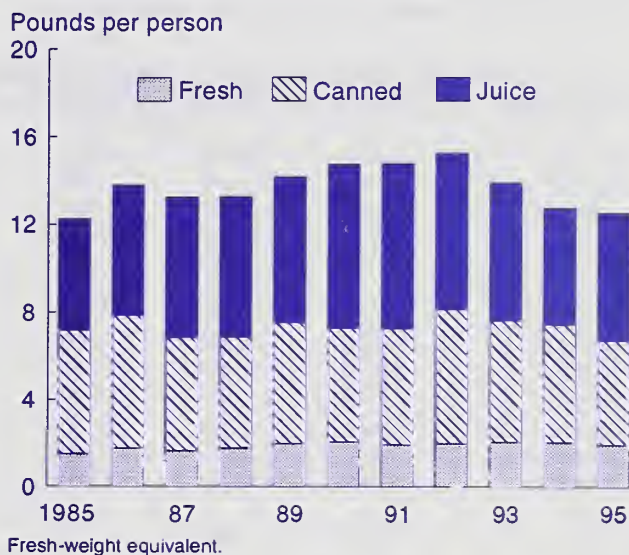
Source: Bureau of the Census, U.S. Department of Commerce.

The United States continues to be a net importer of canned pineapples and pineapple juice. During 1995, the United States imported 655.0 million pounds of canned pineapples and exported about 8 million pounds. During the same year, imports of pineapple juice totaled about 1.3 billion pounds (fresh-weight equivalent) while exports amounted to 39.6 million. Although still a significant proportion of U.S. supplies (about 88 percent), imports of canned pineapples decreased 11 percent from 1994. Shipments from Thailand and the Philippines, the two major suppliers, were down 35 percent and 3 percent, respectively (table 23).

U.S. pineapple juice imports during the same year rose 16 percent to 85.0 million gallons, with larger shipments from the major sources—the Philippines, Thailand, Indonesia, and Japan (table 24). Although minor U.S. sources, Mexico and Hong Kong increased exports to the United States about five- and eight-fold their levels a year earlier, respectively. Despite reduced U.S. exports, tighter supplies of canned pineapples resulted in a drop in domestic consumption, from 5.41 pounds per person in 1994 to 4.77 pounds in 1995. In contrast, consumption of pineapple juice rose from 5.28 pounds (fresh-weight equivalent) per person (0.35 gallons per person, processed-weight) in 1994 to 5.80 pounds (0.39 gallons) in 1995.

Figure 14

## U.S. Pineapple Consumption



## Record Large Florida Early and Midseason Orange Crop in 1995/96

USDA's final forecast of U.S. orange production for 1995/96 is 11.80 million tons, up nearly 2 percent from last year and second only to the record 11.83 million tons produced in 1979/80.

Early, midseason, and navel orange production rose in 1995/96 but Valencia production declined based on USDA's July forecast. Grapefruit production fell 5 percent. The total U.S. citrus crop was nearly 1 percent larger than last season (table 25).

U.S. production of early, midseason, and navel oranges in 1995/96 increased almost 4 percent from last season. Florida production increased 1 percent; early and midseason production reached record highs, and the navel crop was the second largest in history. California navel production increased 14 percent but much of the crop was affected by puff and crease, which contributed to low prices during the middle of the season.

While overall orange production was up, total Valencia production fell nearly 2 percent from last season. Florida's Valencia production was down 4 percent while California's production rose 8 percent, in part due to a good fruit set.

Both Arizona and Texas showed increases in Valencia production although the total was still small. Temple production fell almost 15 percent to 97,000 tons, the second smallest harvest since 1962/63. Temple bearing acres declined by two-thirds in the last 20 years.

Tangerine production in 1995/96 was a record 346,000 tons with production up 27 percent in Florida, 52 percent in Arizona, and 15 percent in California. Bearing acreage rose 30 percent from the 1992/93 to 1994/95 season. In Florida the early varieties (Robinson, Sunburst, and Fallglo) continue to show production increases, up 38 percent in the last three seasons, relative to later maturing varieties. Early varieties are desirable because they mature by the beginning of December; the harvest is in the marketplace for the holiday season, and the crop is less liable to experience cold damage. Tangelo production declined 23 percent. Tangelos are particularly susceptible to cold damage and mature at the same time as tangerines.

Table 25--U.S. Citrus fruit: Utilized production by crop and state, 1992/93-1995/96 1/

Crop and State	1992/93	1993/94	1994/95	1995/96	1992/93	1993/94	1994/95	1995/96
	-- 1,000 boxes 2/ --				-- 1,000 short tons --			
All oranges	255,760	240,450	268,505	273,790	10,992	10,329	11,616	11,796
Arizona	1,850	1,900	1,050	1,650	69	71	39	62
California	66,800	63,600	61,000	68,000	2,505	2,385	2,289	2,550
Florida	186,600	174,400	205,400	203,200	8,396	7,849	9,244	9,144
Texas	510	550	1,055	940	22	24	44	40
All grapefruit	68,375	65,100	71,050	67,600	2,791	2,661	2,912	2,765
Arizona	2,150	1,750	1,400	1,200	69	59	47	40
California	9,200	9,300	9,300	9,500	303	311	312	318
Florida	55,150	51,050	55,700	52,350	2,344	2,171	2,367	2,225
Texas	1,875	3,000	4,650	4,550	75	120	186	182
All lemons	24,800	25,900	24,100	26,100	942	984	916	992
Arizona	4,400	5,200	3,600	5,100	167	197	137	194
California	20,400	20,700	20,500	21,000	775	787	779	798
Limes:								
Florida	1,000	200	230	300	44	9	10	13
Tangelos:								
Florida	3,050	3,350	3,150	2,450	137	150	142	110
All tangerines	5,850	7,400	6,400	8,000	247	318	275	346
Arizona	950	1,000	650	1,000	35	37	25	38
California	2,100	2,300	2,200	2,500	79	86	82	94
Florida	2,800	4,100	3,550	4,500	133	195	168	214
Temples:								
Florida	2,500	2,250	2,550	2,150	113	101	114	97
K-early citrus:								
Florida	185	210	120	160	8	9	5	7
U.S. total citrus	--	--	--	--	15,274	14,561	15,990	16,128

-- = Not applicable.

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

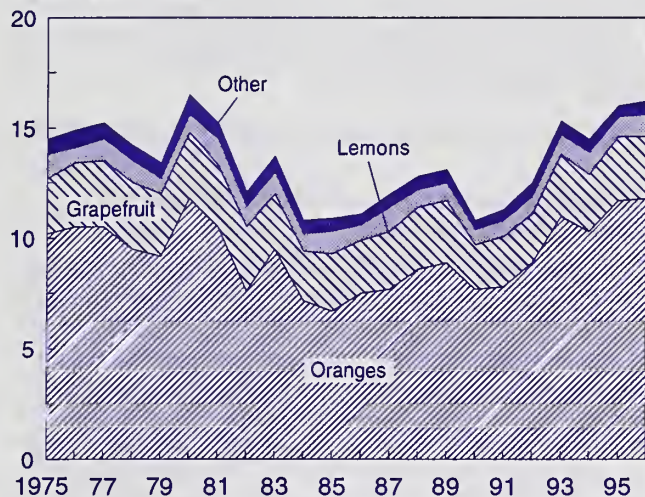
2/ Net pounds per box: oranges-California and Arizona-75; Florida-90; Texas-85; grapefruit-California desert and Arizona-64 prior to 1993/94, then 67; California other areas-67; Florida-85; Texas-80; lemons-76; limes-88; tangerines-California and Arizona-75; Florida-95; tangelos, temples, and K-early-90.

Source: National Agricultural Statistics Service, USDA.

Figure 15

### U.S. Citrus Production

Million short tons



The year harvest ends.

U.S. grapefruit production totaled 2.77 million tons in 1995/96, down 5 percent from last year. Florida, the major producer, saw a decline of 6 percent from the 1994/95 record. Fruit size was very large. Production of white seedless fell 10 percent and colored seedless declined 2 percent. Florida seedy production declined 18 percent to match the 1993/94 record low. Texas production declined 2 percent. California grapefruit production increased 2 percent with good quality.

The 1995/96 lemon production estimate is 992,000 tons, up 8 percent from a year earlier. California production, generally 80-85 percent of the total U.S. crop, increased a modest 2 percent. Arizona production increased 42 percent from the relatively low level of the previous season. Producers, however, continued to experience problems with heart rot dieback disease.

Lime production increased to 13,200 tons in 1995/96, 32 percent above the previous year as the industry rebuilds from the damage of Hurricane Andrew in 1992. Bearing acreage increased 26 percent from last season to 2,400 acres, still below the 6,300 acres in 1992.

# Strong Prices for Florida Oranges and California Valencias

California Valencia production increased and crop quality was good. Strong domestic demand is keeping prices high. Navel prices fell following a poor quality crop. Florida fresh-market production was the lowest since 1989/90, pushing up prices.

Total U.S. orange production is estimated to increase nearly 2 percent in 1995/96 from the previous season (table 26). Production is up in California and Arizona but down in Florida and Texas. Fresh consumption is estimated to increase 11 percent from last season.

Table 26-- U.S. Oranges: Supply and utilization, 1985/86-1995/96

Season 1/	Supply		Utilization		
	Production	Fresh imports	Processed	Fresh exports	Fresh consumption
	-- 1,000 short tons --				
1985/86	7,618	31	5,456	568	1,625
1986/87	7,889	22	5,731	584	1,596
1987/88	8,712	25	6,569	465	1,703
1988/89	9,117	9	7,062	559	1,505
1989/90	7,873	13	5,763	576	1,547
1990/91	7,961	69	6,704	257	1,068
1991/92	9,015	17	6,837	546	1,649
1992/93	11,105	11	8,664	613	1,839
1993/94	10,430	18	8,141	604	1,703
1994/95	11,730	20	9,525	635	1,590
1995/96f	11,893	19	9,518	623	1,771

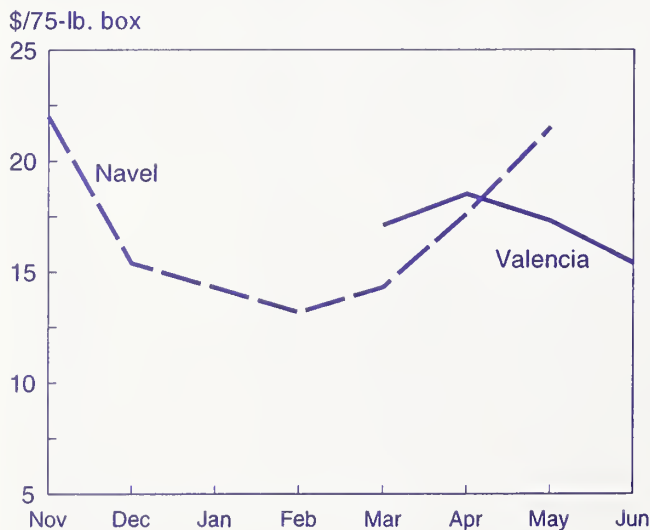
f = forecast

1/ Marketing season begins in November of the first year shown. Includes temples.

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

Figure 16

## Fresh-Market F.O.B. Orange Prices in California, 1995/96



## California's Navel Crop Suffers But Valencia Crop Prices Remain Strong

California 1995/96 navel production increased 14 percent from last season. Quality problems such as puff and crease contributed to marketing difficulties. More fruit went into the lower quality choice grade with prices falling accordingly. Lower quality fruit adversely affected exports through most of the season. The season started late and California navel f.o.b. prices were higher than last year at the beginning of the season. But from January through March, f.o.b. prices ranged from 5 to 17 percent below a year earlier. Export demand was strong in March and April, which helped raise prices above a year earlier at the end of the season.

California Valencia production rose 8 percent due mostly to a heavier fruit set. Quality is good and domestic demand has been particularly strong. F.o.b. prices through June ranged from 7 to 10 percent higher than a year ago. Japan, Hong Kong, and Singapore are particularly important markets for Valencias.

## Strong Florida Fresh Market Season

The Florida Citrus Administrative Committee estimates that in 1995/96, 8.4 million 90-pound boxes of Florida oranges went to the fresh market, only 4 percent of the harvest and the least since 1989/90. Florida exports (excluding Canada) declined 16 percent this season over last. Season-average Florida f.o.b. prices were up 17-18 percent, depending on the type of orange.

## Exports Down Slightly

U.S. orange exports are down 8 percent this season through June, primarily due to lower than expected exports to Japan. In 1994/95, 32 percent of the fresh orange and tangerine exports went to Canada, 29 percent to Japan, and 22 percent to Hong Kong. From November to June this season, exports to Canada were about the same as a year ago. Exports to Japan and Hong Kong were down 23 and 16 percent, respectively. Several potential explanations for lower exports include quality problems for navels, strong domestic demand for Valencias, and a relatively cold winter and spring in Japan which dampened consumer demand for citrus.

# Strong Demand Buoy Orange Juice Prices

Despite record high U.S. orange juice production, strong demand kept prices high. Imports are predicted at 17 percent above last year's relatively low level. Ending stocks are expected to be the lowest since 1991/92.

U.S. orange juice production for 1995/96 is forecast to be a record 1.3 billion single-strength equivalent (SSE) gallons, up 1 percent from last year (table 27). During the five seasons prior to 1995/96 Florida averaged 94 percent of the total U.S. orange juice production. Florida harvested 203.2 million 90-pound boxes of oranges, down 1 percent from last year. Sixty-four percent of the harvest was used for frozen concentrated orange juice (FCOJ), down from 69 percent a year ago. The FCOJ yield for all Florida oranges was 1.52 gallons (42 degrees Brix) per box, 1 percent over last year's yield. The juice yield for early and midseason oranges was 1.45 gallons, also up 1 percent from the previous year. For Valencia oranges the yield was 1.67 gallons per box, up 6 percent.

Table 27—United States: Orange Juice supply and utilization, 1985/86-1995/96

Season 1/	Beginning stocks	Production	Imports	Exports	Domestic consumption	Ending stocks 2/
—Million SSE gallons 3/—						
1985/86	249	683	546	71	1,204	204
1986/87	204	781	557	73	1,267	201
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	169
1992/93	169	1,207	326	114	1,342	247
1993/94	247	1,125	405	106	1,401	269
1994/95	269	1,251	198	117	1,427	205
1995/96 4/	205	1,300	232	115	1,427	195

1/ Season begins in December of the first year shown.

2/ Data may not add due to rounding.

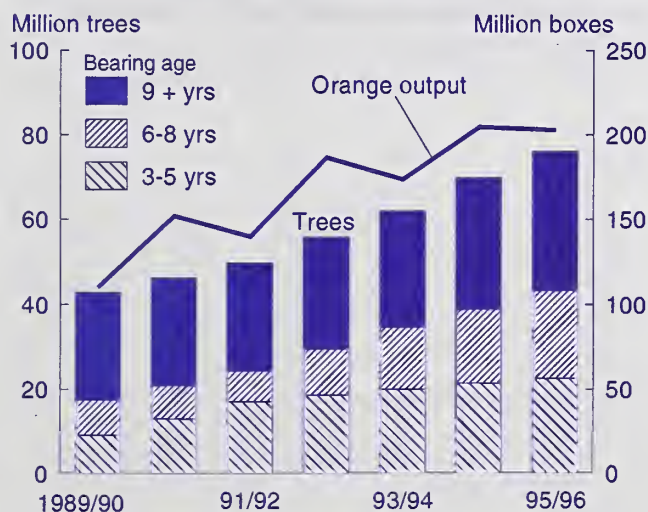
3/ SSE = single-strength equivalent.

4/ Forecast

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

Figure 17

## Florida Oranges: Trees and Output



1995/96 forecast.

This season 31 percent of the orange harvest went immediately to not-from-concentrate (NFC) chilled juice, up from 26 percent last year. FCOJ can be reprocessed at a later date to make reconstituted chilled juice. The Florida Citrus Processors Association (FCPA) reports that as of August 3, 1996, Florida chilled juice production (both NFC and reconstituted juice) was up 12 percent from the same time last season.

### Consumption Up

The FCPA reports that as of August 3, 1996, cumulative movement of FCOJ from Florida was 3 percent above the previous year despite higher prices. Higher prices for apple juice boosted demand for orange juice. However, movement is slowing in the summer months. Analysts are divided over expected movement for the rest of the season. Total Florida movement in 1994/95 was the largest to date. Movement includes both Florida production and imports by FCPA members. Through April of the 1995/96 season, 55 percent of orange juice imports entered through Florida ports compared to 38 percent at the same time last year.

Total U.S. carryin FCOJ stocks on December 1, 1995, were 24 percent below the previous year. As of August 3, 1996, FCOJ stocks in Florida were 12 percent below levels last year. Total U.S. ending stocks this season are forecast at 195 million SSE gallons, down 5 percent from last year, and the lowest since 1991/92.

### Orange Juice Prices Strong

The Florida Citrus Mutual reports that Florida bulk concentrate f.o.b. prices averaged \$1.46 per pound solids for the 1995/96 season through July 27, up 20 percent from the same time last season. So far during the 1995/96 processing season, the average monthly equivalent on-tree prices received by Florida growers for processing oranges has ranged from \$3.00 to \$7.05, up 38 percent from a year earlier (table 28).

### Imports Up

Imports in 1995/96 are predicted to be 232 million SSE gallons, 17 percent above last year's relatively low level. From December 1995 through May 1996, imports totaled 118.6 million SSE gallons, about 6 percent ahead of imports at the same time a year ago. This year 62 percent of imports have come from Brazil, up from 50 percent at this time last year. Imports of Mexican orange juice total 24 percent so far, down from 37 percent last year. Mexican orange juice production in 1995/96 is estimated to be 27 percent lower than last season due to a smaller orange crop. Most of the Mexican orange production goes to the fresh domestic market so the processing industry faces limited supplies of competitively priced oranges.

Table 28—Monthly prices for processed oranges and frozen concentrated orange juice, 1993/94-1995/96

Month	Processed oranges 1/			Near-term futures contract 2/			All grapefruit		
	1993/94	1994/95	1995/96	1993/94	1994/95	1995/96	1993/94	1994/95	1995/96
--Dollars per 85-lb box--									
December	3.38	2.45	3.00	1.067	1.094	1.240	1.672	1.549	1.573
January	3.61	2.80	3.50	1.099	1.048	1.179	1.674	1.583	1.577
February	3.74	3.05	4.50	1.059	1.032	1.258	1.648	1.609	1.625
March	4.00	4.00	4.90	1.094	1.016	1.332	1.665	1.629	1.609
April	4.59	4.40	5.75	1.032	1.058	1.323	1.662	1.632	1.657
May	4.75	4.60	6.60	0.954	1.046	1.235	1.600	1.632	1.704
June	4.77	4.30	7.05	0.925	1.012	1.215	1.598	1.620	1.743
July	--	--	--	0.916	0.936	1.255	1.640	1.639	1.774
August	--	--	--	0.943	1.084	--	1.578	1.642	--
September	--	--	--	0.909	1.122	--	1.594	1.607	--
October	1.40	--	--	1.004	1.162	--	1.574	1.583	--
November	1.95	2.50	--	1.104	1.226	--	1.550	1.550	--
Simple									
Average 4/	3.91	3.66	5.04	1.008	1.070	1.255	1.633	1.608	1.641

-- = Not applicable.

1/ Equivalent on-tree price received by growers, Florida. One box contained 6.52 pounds of orange juice solids in 1993/94, 6.22 in 1994/95, and 6.33 in 1995/96.

2/ Average of Friday closing prices. 3/ 16 fluid ounces of 42 degrees Brix product contain 0.52 pounds of orange juice solids. 4/ 1995/96 averages calculated on available months. Average processed orange price is calculated November/June.

Sources: National Agricultural Statistics Service, USDA; New York Cotton Exchange; Bureau of Labor Statistics, U.S. Department of Labor.

Exports of all orange juice through May of the 1995/96 season are down almost 2 percent from a year ago. Exports to Canada, Western Europe, and Asia accounted for 93 percent of trade through April of this season. The share of exports to Canada and Asia increased 24 and 57 percent, respectively, from last season. The share of exports to Western Europe declined 28 percent because of higher domestic prices this season.

### **Brazilian Orange Juice Production Forecast To Decline 3 Percent in 1996**

Brazilian 1996 FCOJ production is projected at 1,483 million SSE gallons, down 3 percent from 1995 (table 29). Despite the expected decline, exports are forecast to increase 2 percent to 1,511 million SSE gallons, with most going to European markets. Exports to the U.S. will depend on Florida's production.

The harvest for Brazil's 1996 orange season began in June. In 1995, the State of Sao Paulo accounted for 98 percent of total Brazilian FCOJ production. Orange production in Sao Paulo is forecast at 352 million boxes in 1996 with 247 million boxes destined for processing.

Table 29—Brazilian FCOJ production and utilization, 1990/91-1995/96

Season 1/	Beginning stocks	Production	Domestic consumption	Exports	Ending stocks 2/
--Million SSE gallons 3/--					
1991	177	1,334	25	1,390	96
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	31	1,483	229
1996f	229	1,483	31	1,511	170

f = forecast.

1/ Season begins in July of the indicated year.

2/ Data may not add due to rounding.

3/ SSE = single-strength equivalent.

Source: Foreign Agricultural Service, USDA.

Brazilian domestic consumption of fresh oranges has been increasing over the last 10 years. Large production and less aggressive buying by processors have led to lower fresh prices and strengthened consumer demand. Changes in the economy that have increased income for lower- and lower-middle income consumers also have bolstered demand for fresh oranges.



# Record Exports Raise Fresh Grapefruit Prices

*Fresh grapefruit continued to face low demand in the domestic market while exports increased. Grapefruit juice prices remain low with large stocks overhanging the market.*

U.S. grapefruit production in 1995/96 is expected to decline to 2.77 million tons, 5 percent below last year and 9 percent below the 1976/77 record (table 30). Florida production, 80 percent of the total U.S. crop, declined 6 percent. Production of all three types of grapefruit declined: white seedless fell 10 percent, colored seedless fell 2 percent from last year's record, and seedy declined 18 percent. The seedy crop, estimated at 45,000 tons, continues to decline. Fruit size in Florida was very large this year. Texas production, which is still recovering from the 1990/91 freeze, was 2 percent lower than last year. Arizona production declined 15 percent and California production is likely to increase 2 percent.

Table 30--U.S. Grapefruit: Supply and utilization, 1985/86-1995/96

Season 1/	Supply		Utilization		
	Production	Fresh imports	Processed	Fresh exports	Fresh consumption
-- 1,000 short tons --					
1985/86	2,352	3	1,264	353	738
1986/87	2,586	2	1,386	436	766
1987/88	2,801	6	1,469	523	815
1988/89	2,844	4	1,449	587	812
1989/90	1,978	5	1,096	337	550
1990/91	2,256	8	1,015	513	736
1991/92	2,224	12	975	506	755
1992/93	2,791	14	1,518	486	801
1993/94	2,661	16	1,377	506	794
1994/95	2,912	15	1,596	536	795
1995/96f	2,765	19	1,430	573	781

f = forecast

1/ Marketing season begins in September of the first year shown.

Source: Economic Research Service, USDA.

## Domestic Fresh Sales Weak but Exports Increase to Record Levels

Data from the Florida Citrus Administrative Committee show that while total Florida fresh grapefruit shipments increased 3 percent during 1995/96, the growth was in the export market. Fresh Florida domestic shipments in 1995/96 to the U.S. and Canada were 7 percent below last season. Florida fresh shipments declined 7.5 percent for white seedless and 6.7 percent for red seedless. Texas fresh shipments to the U.S. and Canada were also down 6.2 percent from last year.

U.S. fresh grapefruit exports from September through June this season were up 5 percent from a year ago. Exports to the European Union increased 20 percent above levels at the same time last year. Quality of red grapefruit on arrival in export markets was much better than in recent years. Industry analysts credit strong growth in Europe to the relatively weak U.S. dollar and a decline in noncitrus fruit supplies. Texas grapefruit had problems with irregular shape (sheepnose) and short shelf-life so exports were down and more fruit went into the processed market.

Florida domestic f.o.b. prices increased for both white and red grapefruit. Fresh-market Florida white grapefruit prices increased 5-10 percent from last year and red increased 10-11 percent. The average of monthly on-tree-equivalent prices for fresh-market grapefruit was \$3.96 for Florida this year, 15 percent lower than last year (table 31). The monthly on-tree-equivalent prices reflect f.o.b. prices minus the packing charges and the costs of picking the fruit, loading, and delivery. This price also includes returns from fruit sold on the export market. If a higher percent of fruit fails to meet the stringent export market standards, it is possible for export returns to fall below domestic returns. November 1995 f.o.b. prices for all Florida fresh grapefruit

Table 31--Grapefruit: Average monthly equivalent on-tree prices received by growers, Florida, 1992/93-95/96

Month	Fresh grapefruit				Processing grapefruit				All grapefruit			
	1992/93	1993/94	1994/95	1995/96	1992/93	1993/94	1994/95	1995/96	1992/93	1993/94	1994/95	1995/96
--Dollars per 85-lb box--												
September	--	--	8.65	--	--	--	-2.31	--	--	--	7.20	--
October	7.41	9.47	6.89	6.37	0.81	-0.34	-1.91	-1.28	6.28	7.43	4.37	4.84
November	5.38	6.20	3.69	4.13	1.17	-0.30	-1.64	-1.93	4.24	4.49	1.73	2.22
December	5.28	5.17	3.38	2.92	1.38	0.01	-1.25	-1.69	3.78	3.30	1.22	1.37
January	4.06	4.99	4.39	3.48	1.39	0.50	-0.71	-0.96	2.77	2.92	1.44	1.36
February	4.68	5.16	4.69	3.45	1.06	0.82	-0.11	0.04	2.66	2.59	1.34	1.39
March	4.09	5.68	4.23	1.65	1.04	1.01	-0.13	0.04	1.81	2.43	1.03	0.53
April	4.58	4.95	3.36	5.14	1.01	0.82	-0.86	-0.19	2.10	2.10	0.55	1.87
May	3.21	1.99	2.75	4.55	0.97	0.37	-1.81	-0.31	1.60	0.96	0.22	2.37
June	3.00	2.10	--	--	0.55	-0.47	--	--	1.50	1.09	--	--

-- = Insufficient marketing to establish price.

Source: National Agricultural Statistics Service, USDA.

exceeded those of November 1994. April and May prices were also much stronger than the previous year. Consumers in Japan and Hong Kong prefer the sweeter grapefruit available at the end of the season. Also, a tighter supply situation for noncitrus fruit may have bolstered the demand for grapefruit.

### **Large Grapefruit Juice Stocks Still Depressing Juice Prices**

The Florida Citrus Administrative Committee reports that for the 1995/96 season 1.253 million tons of the Florida grapefruit crop went to the processing sector, down about 12 percent from the previous season. Only 57 percent of the Florida grapefruit supply went into processing in 1995/96 compared to 60 percent in 1994/95. Processing took 76.1 percent of the Florida white seedless crop and 40.5 percent of the red seedless crop. The Florida grapefruit juice yield is 1.17 gallons (40 degrees Brix) per box, 3 percent below the average of the previous five seasons. Florida beginning stocks of frozen concentrate for the 1995/96 season were 13.1 million gallons, up 37 percent from the previous year.

The Florida Citrus Processors Association reports that Florida frozen concentrated grapefruit juice production through August 3 of the 1995/96 season declined 13 percent from the same time last year. Movement to date is down 2 percent from a year ago. Stocks on August 3, 1996, were about 2 percent above the same time last year. White juice accounts for 72 percent of bulk stocks, a slightly higher percentage than in previous years. Estimated monthly on-tree-equivalent prices for processing grapefruit averaged a

negative \$0.79 for 1995/96, a slight improvement over last year's minus \$1.19.

The prices for processing grapefruit vary by variety. In the early and mid-1980s red juice commanded a premium over white. Between 1984 and 1994 red grapefruit tree numbers increased 87 percent while white grapefruit trees declined 2 percent. The large increase in red grapefruit supplies will continue to depress prices. Estimated monthly on-tree-equivalent prices for processing grapefruit averaged a minus \$0.03 for white seedless and a minus \$1.71 for red seedless. Seedy grapefruit prices averaged \$1.01 for the season. The Florida Citrus Mutual reports season average prices (weighted by bulk movement) through July 27 for Florida bulk frozen concentrated grapefruit juice are down 2 percent for red and 12 percent for white. The market for grapefruit byproducts, such as peel products and animal feed pellets, has lifted the returns for farmers while the price of juice remains low.

For the 1995/96 season, 77 percent of the Florida processed grapefruit went to frozen concentrated grapefruit juice. The importance of chilled grapefruit juice has continued to grow and 23 percent of the processed grapefruit went immediately into NFC chilled production (frozen concentrate can be reprocessed later into chilled). Data from large retail stores, collected by A.C. Nielson, show that season-to-date sales of all grapefruit juice products through July 13, 1996, are down 2.3 percent from the same time last season. Frozen concentrate consumption was down 6 percent from a year ago. Between 1983/84 and 1993/94, chilled juice grew from 35 percent to 63 percent of the grapefruit juice market.

## **Almond, Walnut Harvests Increase, Other Nut Crops Average**

*Generally normal weather in California portends good crops in the West. Southwest pecan orchards have experienced drought conditions. Southeast conditions are good.*

---

### **Almond Supply Rebounds**

California expects 530 million pounds (shelled basis) of almonds to be harvested this year. The forecast is 43 percent higher than the small crop harvested in 1995. Even though bloom conditions were reported good to excellent by most growers, cold weather and intermittent rain storms during February and March hampered pollination. The estimated 410,000 bearing acres for 1996 are up approximately 10,000 acres from last year. Production of Nonpareil, the major almond variety, is forecast at 250 million pounds, up 52 percent from last season. The average nut set is 5,482 almonds per tree, up 45 percent from 1995. The Nonpareil nut set is 4,963, 29 percent above last year. The average kernel weight, at 1.85 grams, is down slightly from last year, but the percent of sound nuts is 97, indicating excellent quality and only minor insect and other off-grade problems.

Stocks at the end of the 1995/96 marketing year (June 30) totaled 89.1 million pounds, according to the Almond Board of California, the lowest in recent years (table 32). Domestic almond demand declined last year to 133 million pounds or .50 pounds per capita, the third lowest since 1982/83. The season-average grower price hit a record high of \$2.39 per pound, compared with 1994's \$1.34 and the previous record of \$1.94 set in 1993.

The high price and low supply situation during the 1995/96 season caused exports to fall to 335 million pounds, well below those of the past five seasons. With the much improved supply situation for the 1996/97 marketing season, exports are expected to increase dramatically and domestic consumption should also rise. Even though prices are likely to decline due to the larger supply, grower cash receipts should total about \$1 billion.

### **Walnut Production Up Slightly**

California walnut production is forecast at 235,000 tons (in-shell basis), slightly higher than the 1995 crop. Bearing acreage is estimated at 169,000 acres, the same as in 1995. Expectations are for above average yields from early-season varieties, while mid- and late-season varieties are expected to have average yields. Heavy drop resulted from this winter's low chilling hours and rains received in May. An updated production forecast by USDA, based upon an objective measurement survey, will be available on August 30, 1996.

Total supply for the 1996/97 marketing year should be virtually the same as last season because beginning stocks are slightly lower than a year ago. According to the Walnut Marketing Board, in-shell shipments August 1, 1995-June

30, 1996 totaled 137 million pounds, down 13 percent from a year earlier. Shelled shipments totaled 141 million pounds through June 30, compared with 121 million pounds the previous year. Total domestic shipments through June 30 exceeded 148,000 tons (in-shell equivalent), up 18 percent from last season, while export shipments totaled nearly 90,000 tons, down 10 percent. Shipments to most European markets as well as to Canada and other major world markets were lower during the 1995/96 season. The primary reason is ever-increasing competition from China. However, domestic demand for U.S. walnuts continues to hold steady.

The grower price averaged \$1,340 per ton during the 1995/96 season, compared with \$1,000 the previous year due to quality problems, and \$1,390 per ton in 1993/94. Prices for the 1996/97 marketing year are expected to remain good.

### **Smaller Hazelnut Output**

The Oregon hazelnut crop this year is expected to be much lower than in 1995 due to the alternate-bearing nature of this tree nut even though bearing acres continue to increase. Flooding and other weather-related problems have reportedly caused only minor losses. The official USDA forecast based upon an objective measurement survey will be available on August 27, 1996. The 1995 U.S. hazelnut production was 39,000 tons (in-shell basis) and nearly all of this production was located in Oregon. In spite of a large supply during the 1995/96 season, the grower price averaged \$913 per ton, the highest since 1987 due to strong domestic demand. Carryover stocks for the 1996/97 marketing year that began July 1 were seasonally low and will have little impact on the available supply. Therefore, prices are expected to continue very strong.

### **Pecan Crop Prospects Mixed**

Some pecan producing States expect production to rise this year while others anticipate a decrease from 1995. Overall, prospects are for an average size pecan crop. Some industry estimates place the 1996 U.S. crop at about 250 million pounds. The first official forecast will be issued by USDA on September 11, 1996. Last year production totaled 268 million pounds (in-shell basis), compared with a small crop of 199 million in 1994 and the second-largest crop on record of 365 million in 1993. The pecan crops this year are down substantially in Texas and Oklahoma due to drought conditions. New Mexico output is also much lower than the record crop harvested last year, but yields this year should be near average. Georgia, the largest producing State, expects a substantial increase from the below normal crop produced in 1995.



The U.S. grower price for all pecans was strong last year averaging \$1.01 per pound for the entire season, compared with \$1.04 per pound for the 1994 crop and 58.6 cents in 1993. Beginning stocks for the 1996/97 season (July 1) at 49 million pounds were 11 percent lower than a year ago. Pecan exports and imports are growing, but in the 1990's imports have accelerated more, leaving the United States a net importer of pecans. Nearly all pecan imports are from Mexico and the quantity imported varies from year to year depending on the U.S. supply situation. Typically, imports account for 10-20 percent of total pecan supply. The industry reports that Mexico could add substantially to the supply this year and in years to come. Some estimate that Mexico could have as many as 130,000 acres of irrigated pecans in various stages of maturity. Mexico may eventually produce as many pecans as Georgia and Texas combined or approximately two-thirds of total U.S. production.

### ***Pistachio Production Expectations Good***

There will be no production forecast for California pistachios this season. Results of an objective measurement survey will be released on August 30 showing nut set and other yield factors. The first USDA production estimate will be available in January 1997. Indications are that a good crop is expected. Pistachios, like walnuts, bloom later than many other fruit and nut crops and appear to have been generally unaffected by spring rains. Pistachios, however, are more alternate-bearing than walnuts, and more similar biologically to almonds, bearing heavy one year and then bearing lighter the next. In 1995, pistachio

production was 148 million pounds in California, compared with 129 million in 1994 and 152 million in 1993. Bearing acreage was 60,300 in 1995 and should be higher in 1996 as acreage continues to trend upward.

The grower price last season averaged 95.7 cents per pound (in-shell basis). This compares to 92.1 cents per pound in 1994 and \$1.07 in 1993. According to the California Pistachio Commission, the in-shell pistachio inventory was 22.6 million pounds on June 30, 1996, exactly the same as on June 30, 1995. Shelling stock this June stood at 6.2 million pounds, compared with 3.9 million a year ago. Domestic in-shell shipments totaled 59.9 million pounds (September 1-June 30) this year, compared with 72.4 million a year earlier. However, export in-shell shipments for the same period during the 1995/96 season, at 34.6 million pounds, were slightly higher than in 1994/95. Major export markets include Eastern Europe, Australia, Hong Kong, Korea, Japan, Switzerland, and Canada.

### ***Macadamia Nut Output Trending Upward***

Although the 1995 production of Hawaii macadamia nuts fell slightly to 50 million pounds (in-shell basis), output of macadamias continues to trend upward due to increasing numbers of bearing trees. In 1995, bearing acreage stood at 19,300, compared with 18,500 acres in 1994. Acreage and production are expected to continue gradually upward. Grower prices have also been improving with 1995 prices averaging 74.0 cents per pound, up from 69.0 cents in 1994.

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