Fruit Situation

Economic Research Service

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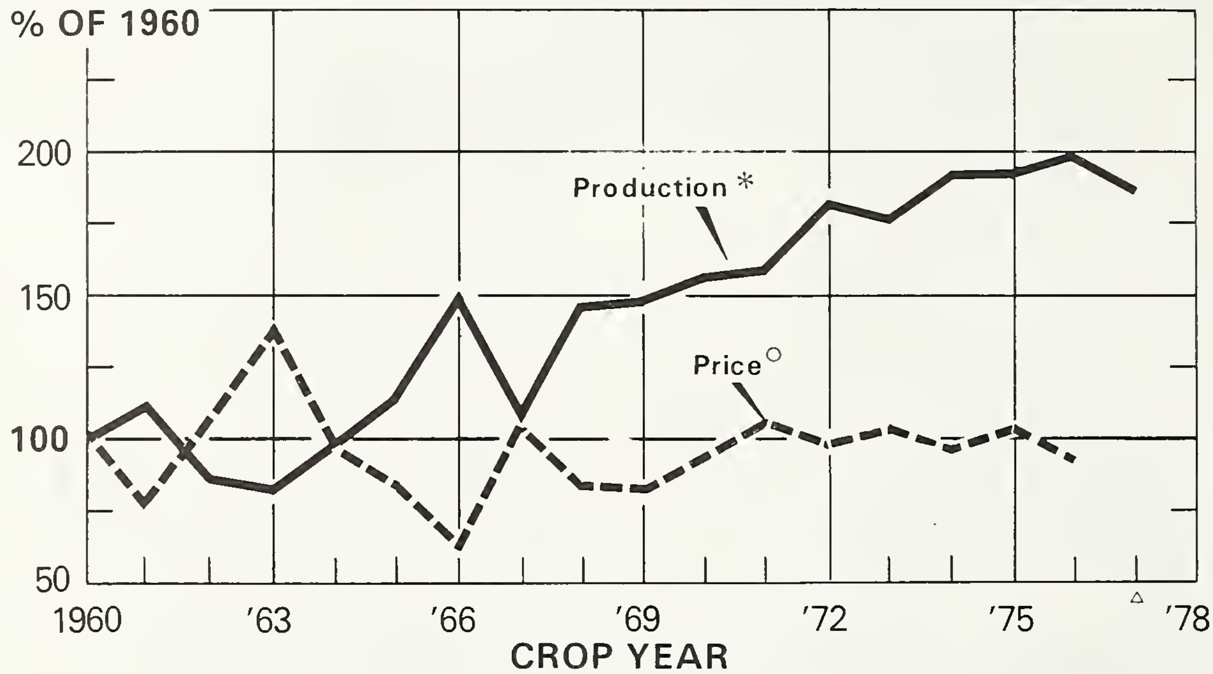
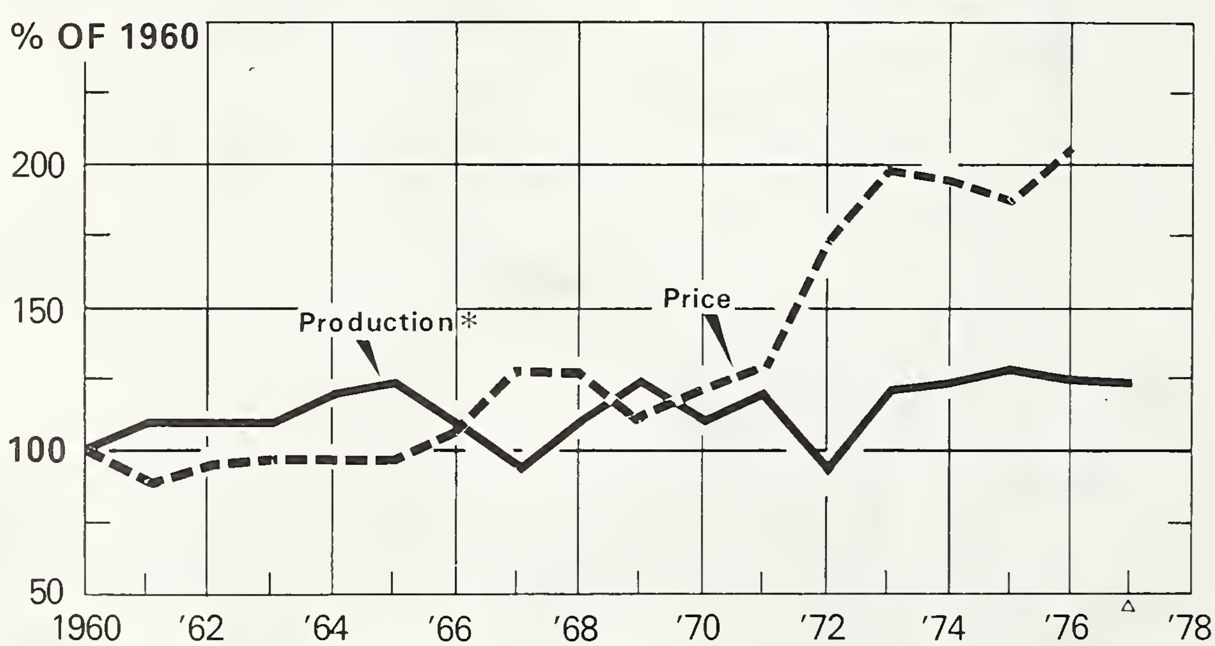
CITRUS FRUIT PRODUCTION AND PRICES



*INCLUDES PRODUCTION OF ALL CITRUS FRUITS. ○SEASON AVERAGE PRICE TO GROWERS. PRICE WEIGHTED BY PRODUCTION. Δ PRELIMINARY.

USDA NEG. ERS 2042-77(4)

NONCITRUS FRUIT PRODUCTION AND PRICES



*15 IMPORTANT FRUITS. ○SEASON AVERAGE PRICE TO GROWERS. PRICE WEIGHTED BY PRODUCTION. ΔPRELIMINARY.

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THE FRUIT SITUATION

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SUMMARY

Smaller Supplies, Strong Demand Exert Upward Pressure on Prices

Smaller supplies of most citrus, moderate supplies of most noncitrus, and strong demand are expected to keep prices for fresh and processed fruit this season moderately above last year's levels.

The first forecast of the 1977/78 citrus crop is 14.3 million tons, 6 percent less than last year's record and 2 percent below 1975/76. The indicated orange crop is down 9 percent, but Florida's early and mid-season crops—both important juice producers—will be down 23 percent.

The smaller crops of Florida oranges and strong demand will result in higher prices for frozen concentrated orange juice (FCOJ) this season. Stocks in marketing channels in mid-October were low because of a high level of sales and a smaller pack as the result of a low yield of juice (1.07 gallons per box) from last season's freeze-damaged crop. Carryout at the end of the season will be smallest in several years. However, based on the current crop and juice yield estimates, the 1977/78 pack could be up moderately over last year. This would result in a total supply below 1976/77 levels. These smaller supplies will be reflected in retail prices throughout the 1977/78 season above last year's level.

A record-large grapefruit crop is indicated and prices should be moderately lower than last year. The lemon crop is expected to be slightly smaller than 1976/77 and f.o.b. prices are likely to average moderately higher.

The 1977 noncitrus fruit crop is forecast at 11.14 million tons, slightly below last year's level, and 4 percent below 1975. Shipping point prices for most fresh noncitrus fruits have been generally above a year ago. Available supplies for fresh market sales are not expected to be large this season since processor demand is strong due to the smaller carryover stocks of many processed noncitrus items. Consequently, f.o.b. prices for most noncitrus fruit are likely to remain above year-earlier levels. This also will be reflected in higher prices to consumers.

The 1977/78 pack of most noncitrus fruit is expected to be above that of a year ago. However, total supplies of canned noncitrus are still likely to be near last year's level because of smaller carryin stocks at the beginning of the season, while supplies of dried and frozen fruit are expected to be moderately above a year ago. Demand for processed noncitrus fruit is expected to be good both here and abroad. Thus, with higher costs of raw materials and processing, prices of processed noncitrus items at all levels are expected to remain firm.

The total crops of domestic tree nuts (almonds, filberts, pecans, and walnuts) are estimated at 603,500 tons (in-shell basis) substantially larger than last season, because of a sharply larger pecan crop, plus large crops of almonds and walnuts. Prices for pecans will decline from last year's highs, but almond and perhaps walnut prices will remain slightly above year-earlier levels.

RECENT DEVELOPMENTS AND OUTLOOK

GENERAL PRICE OUTLOOK

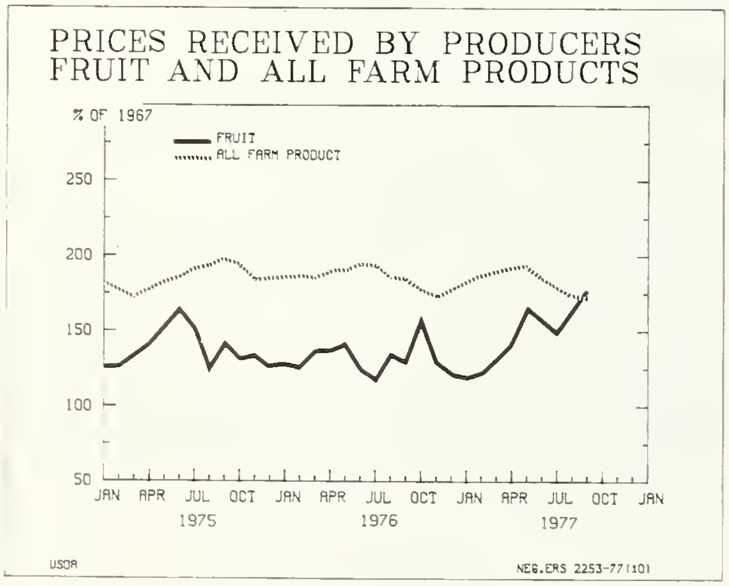
Prices received by growers for fresh and processed fruit so far this year have averaged substantially above year-earlier levels. The September index of prices received by growers stood at 176 (1967=100), up moderately from August's level and well above a year ago. Higher prices were recorded for most fruits, particularly for citrus. The seasonal increase in supplies of fresh fruit this fall will result in price declines from current levels, but the price index in the fourth quarter is still expected to average moderately higher than a year ago. Consequently, the 1977 index of prices received by growers for fresh and processed fruit will average well above year-earlier levels.

The 1977 contract prices negotiated for most noncitrus fruit for processing are above last year's levels, which will push up the 1978 grower price index. Even with the larger apple crop, grower prices for apples for fresh market use are not expected to decline substantially from last year's high levels. Thus, the higher contract prices combined with the smaller output of pears and citrus fruit are likely to push the grower prices above year-earlier levels through the winter.

Table 1—Index of quarterly prices received by growers for fresh and processed fruit

Year	(1967=100)			
	1st	2nd	3rd	4th
1973	123	136	148	142
1974	133	140	148	142
1975	129	152	140	130
1976	130	134	127	137
1977	124	154	165	

Source: Agricultural Prices, SRS.



Retail prices for most fresh fruit have been moderately to substantially above year-earlier levels. The Bureau of Labor Statistics (BLS) September retail price index for fresh fruit stood at 180.4 (1967=100), one-tenth higher than a year ago. With the seasonal increase in supplies of fresh fruit, retail prices are expected to decline this fall. However, smaller supplies of citrus fruit combined with higher marketing costs will keep the retail fresh fruit price index moderately higher this fall than a year earlier.

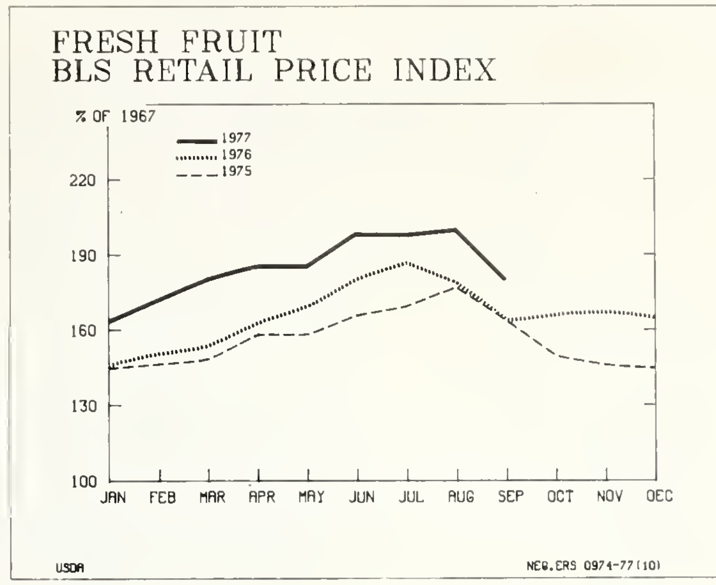
Wholesale prices of canned fruit have been moderately above year-earlier levels. The BLS wholesale price index had dipped in July and August, but the September index strengthened, advancing to 179.9 (1967=100) from 178.8 in August. In response to good demand and tight supplies of frozen concentrated orange juice, the wholesale price

Table 2—Quarterly wholesale price indexes for canned fruit

Year	(1967=100)			
	1st	2nd	3rd	4th
1972	112.4	114.6	115.5	111.0
1973	119.6	121.3	124.3	131.7
1974	136.0	140.8	163.6	170.4
1975	170.3	170.7	167.3	164.9
1976	162.8	164.9	171.2	174.0
1977	175.4	179.0	179.6	

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

index for frozen fruits and juices has been well above last year. With higher prices of raw products and higher processing costs, wholesale prices of processed fruit items will remain higher through the winter.



FRESH CITRUS FRUIT

The first forecast of U.S. citrus production (except grapefruit in California, other than desert areas) for the 1977/78 season is estimated at nearly 14.3 million tons, down 6 percent from 1976/77 and 2 percent below 1975/76. Orange production is forecast to be 9 percent smaller than last year, but larger crops are indicated for Florida grapefruit, tangerines, and Temples. Tangelos are estimated to be the same as last year.

Oranges

Smaller Crop

October 1 prospects point to a 9-percent decrease in total U.S. orange production during the 1977/78 season. The lower output is mostly due to a drastic reduction in the early and midseason Florida orange crops, down 23 percent from last year's record crop and the smallest crop since 1971/72. The set of fruit on trees is the prime contributor to the production decline as a result of last year's freeze. In addition, orange acreage is down somewhat in Florida.

The U.S. output of early, midseason, and Navel oranges is forecast at 115.9 million boxes, down one-fifth from last year's record level and 12 percent below the 1975/76 level. The largest reduction is expected in Florida's early and midseason varieties. Production is forecast at 88 million boxes, compared with 115 million last year and 98.8 million in 1975/76. The crops of California Navel and miscellaneous varieties at 23 million boxes, is down 10 percent from last year and 19 percent from 1975/76. The Arizona early and midseason orange crop, at 820,000 boxes, is up 2.5 percent. The Texas crop, at 4.1 million boxes is forecast 7 percent smaller than last season.

The U.S. Valencia crop is estimated at 106.7 million boxes, up 8 percent from last year, but 4 percent lower than in 1975/76. At 76 million boxes, the Florida crop is up 6 percent over last year, when Valencias were hard-hit by the freeze, but 8 percent smaller than the 1975/76 crop. The California crop of 25 million boxes is nearly one-fifth larger than last year but only slightly larger than in 1975/76. Arizona producers expect to harvest 3.3 million boxes of Valencias, up slightly from last year, and Texas producers expect a crop of 2.4 million boxes, down slightly from a year earlier.

U.S. prices to growers for fresh and processing oranges during the 1976/77 season averaged $1.56 per box (equivalent on-tree returns) compared with $1.77 in 1975/76 and $1.72 in 1974/75. Prices averaged lower because of the large crop and the lower juice yield of the freeze-damaged fruit. The total value of all orange sales during 1976/77 was $649 million, at equivalent packinghouse door prices.

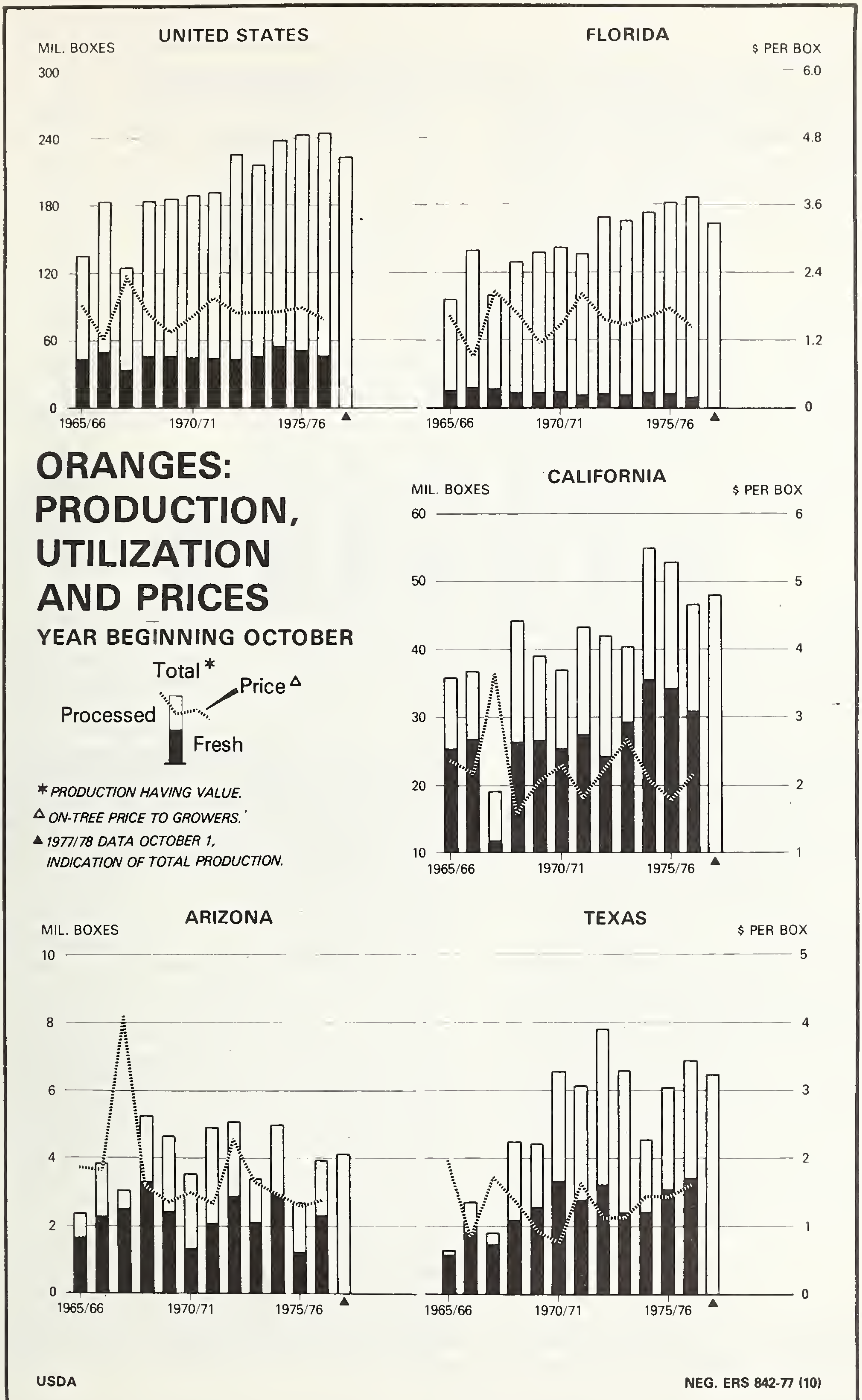
The season average price (equivalent on-tree returns) for all oranges in Florida during 1976/77 is estimated to be $1.41 per box, compared with $1.77 a year earlier. Valencias averaged $2.27 per box, up from $1.88 a year earlier. In contrast, the 1976/77 California orange prices averaged $2.18 per box, up considerably from $1.79 the previous year. California Navel and miscellaneous varieties averaged $2.36 per box, compared with $1.96 in 1975/76.

Table 3—Citrus fruit: Production, 1975/76, 1976/77, and indicated 1977/78[1]

Crop and State	Boxes			Ton equivalent		
	Utilized		1977/78	Utilized		1977/78
	1975/76	1976/77		1975/76	1976/77	
	1,000 boxes[2]			*1,000 tons*		
Oranges:						
Early, Midseason and Navel varieties[3]:						
California	28,300	25,600	23,000	1,061	960	863
Florida	98,800	115,000	88,000	4,446	5,175	3,960
Texas	3,700	4,400	4,100	157	187	174
Arizona	730	800	820	27	30	31
Total	131,530	145,800	115,920	5,691	6,352	5,028
Valencias:						
California	24,500	21,000	25,000	919	788	938
Florida	82,400	71,800	76,000	3,708	3,231	3,420
Texas	2,400	2,500	2,400	102	106	102
Arizona	1,950	3,150	3,300	73	118	124
Total	111,250	98,450	106,700	4,802	4,243	4,584
All Oranges:						
California	52,800	46,600	48,000	1,980	1,748	1,801
Florida	181,200	186,800	164,000	8,154	8,406	7,380
Texas	6,100	6,900	6,500	259	293	276
Arizona	2,680	3,950	4,120	100	148	155
Total oranges	242,780	244,250	222,620	10,493	10,595	9,612
Grapefruit:						
Florida all	49,100	51,500	54,000	2,088	2,189	2,296
Seedless	41,300	42,400	46,000	1,756	1,802	1,956
Pink	13,000	12,500	15,000	553	531	638
White	28,300	29,900	31,000	1,203	1,271	1,318
Other	7,800	9,100	8,000	332	387	340
Texas	10,700	12,400	11,500	428	496	460
Arizona	3,080	3,000	3,100	99	96	99
California	7,200	7,600	---	235	248	---
Desert Valleys	4,100	4,500	4,400	131	144	141
Other areas[4]	3,100	3,100	---	104	104	---
Total grapefruit	70,080	74,500	---	2,850	3,029	---
Lemons:						
California	15,200	20,600	20,000	578	783	760
Arizona	2,420	5,000	5,300	92	190	201
Total lemons	17,620	25,600	25,300	670	973	961
Limes:						
Florida	1,080	1,000	500	43	40	20
Tangelos:						
Florida	5,500	4,800	4,800	248	216	216
Tangerines:						
Florida	3,400	3,300	3,400	162	157	162
Arizona	660	650	725	25	24	27
California	1,300	1,820	1,900	49	68	71
Total tangerines	5,360	5,770	6,025	236	249	260
Temples:						
Florida	5,500	3,800	5,200	248	171	234
Total[5]	344,820	356,620	337,445	14,684	15,169	14,299

[1] The crop year with bloom of the first year and ends with completion of harvest the following year. [2] Net content of box varies. Approximate averages are as follows: Oranges-California and Arizona, 75 lbs.; Florida, 90 lbs., Texas, 85 lbs.; Grapefruit-California, Desert Valleys, and Arizona, 64 lbs.; other California areas, 67 lbs.; Florida, 85 lbs. and Texas, 80 lbs.; Lemons, 76 lbs.; Limes-80 lbs.; Tangelos-90 lbs.; Tangerines-California and Arizona, 75 lbs.; Florida, 95 lbs.; and Temples-90 lbs.; [3] Navel and Miscellaneous varities in California and Arizona. Early and Midseason varieties in Florida and Texas, including small quantities of tangerines in Texas. [4] The first forecast for California grapefruit, "other areas", will be as of December 1. [5] Excludes California grapefruit in "other areas".

Source: Crop Production, SRS.



UNITED STATES
FLORIDA
MIL. BOXES
$ PER BOX
300
240
180
120
60
0
6.0
4.8
3.6
2.4
1.2
1965/66
1970/71
1975/76
ORANGES: PRODUCTION, UTILIZATION AND PRICES
YEAR BEGINNING OCTOBER
Total *
Price △
Processed
Fresh
* PRODUCTION HAVING VALUE.
△ ON-TREE PRICE TO GROWERS.
▲ 1977/78 DATA OCTOBER 1, INDICATION OF TOTAL PRODUCTION.
CALIFORNIA
MIL. BOXES
$ PER BOX
60
50
40
30
20
10
6
5
4
3
2
1
ARIZONA
TEXAS
MIL. BOXES
$ PER BOX
10
8
6
4
2
0
5
4
3
2
1
0
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Export Demand Weaker

Export demand for fresh oranges weakened during the 1976/77 season. During the first 11 months of the season (November 1976 through September 1977) exports totaled 382,775 metric tons, 8 percent below the quantity shipped during a similar period a year earlier. Exports to Canada, our major customer, were down 1 percent, while exports to Europe and Japan were down 33 and 8 percent, respectively.

Export shipments of U.S. oranges during 1977/78 could reach the 1976/77 level. Trade reports indicate smaller orange supplies from the Mediterranean region, especially Spain. Smaller supplies of competing fresh noncitrus fruit, especially apples, in Europe will also probably strengthen demand for oranges. Despite the smaller domestic crop, strong demand, and higher prices, the recent depreciation of the dollar relative to other currencies may make U.S. oranges a good buy to foreign buyers if current relationships are maintained.

Market Prospects

Price behavior during the 1977/78 season will depend on a number of factors. Acting to push the price up will be sharply lower carryover stocks of frozen concentrated orange juice. In addition, increased consumer disposable income and higher prices for most competing fruits will strengthen prices. Consequently, current prospects for oranges through the winter months point to grower prices declining seasonally, but averaging slightly to moderately above year-earlier levels. These prices will show up at the retail level.

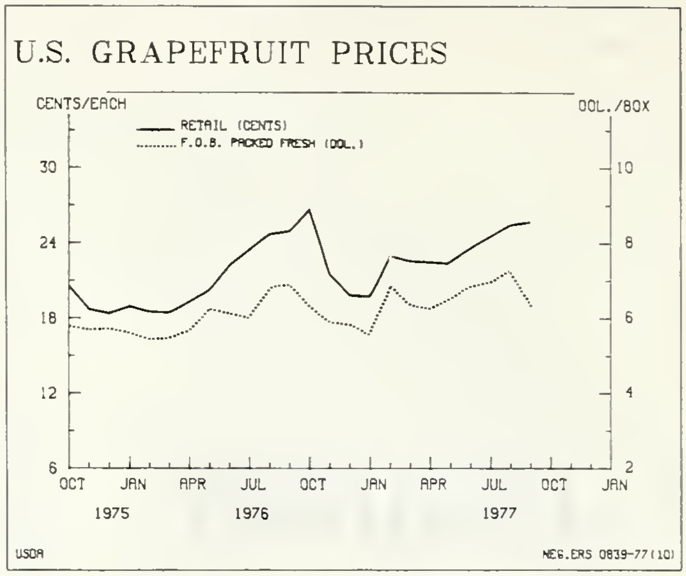
Grapefruit

Record Crop in Prospect

Supplies for 1977/78 are expected to total 3.0 million tons or 73.0 million boxes (for California, includes Desert Valley fruit only) up 2 percent from last season. The large crop this season results from a record Florida crop. Florida's grapefruit crop is forecast at an all-time high of 54.0 million boxes, 5 percent above the previous record set last season. Supplies of both pink and white seedless varieties will be larger. Arizona growers also expect to harvest a 3-percent larger crop, but the crop in Texas will be down 7 percent and the California Desert Valley crop will be 2 percent less than last season.

Utilization and Value of the 1976/77 Crop

Reflecting the record large grapefruit crop and freeze damage in Florida last year, the proportion of the crop used fresh dropped to 38 percent, but the actual quantity used fresh remained fairly constant at 1.1 million tons. Processing use increased to 62 percent of the crop and the actual quantity processed also increased 0.4 million tons to 1.9 million tons. The value of production increased to $168 million, at packinghouse door prices.



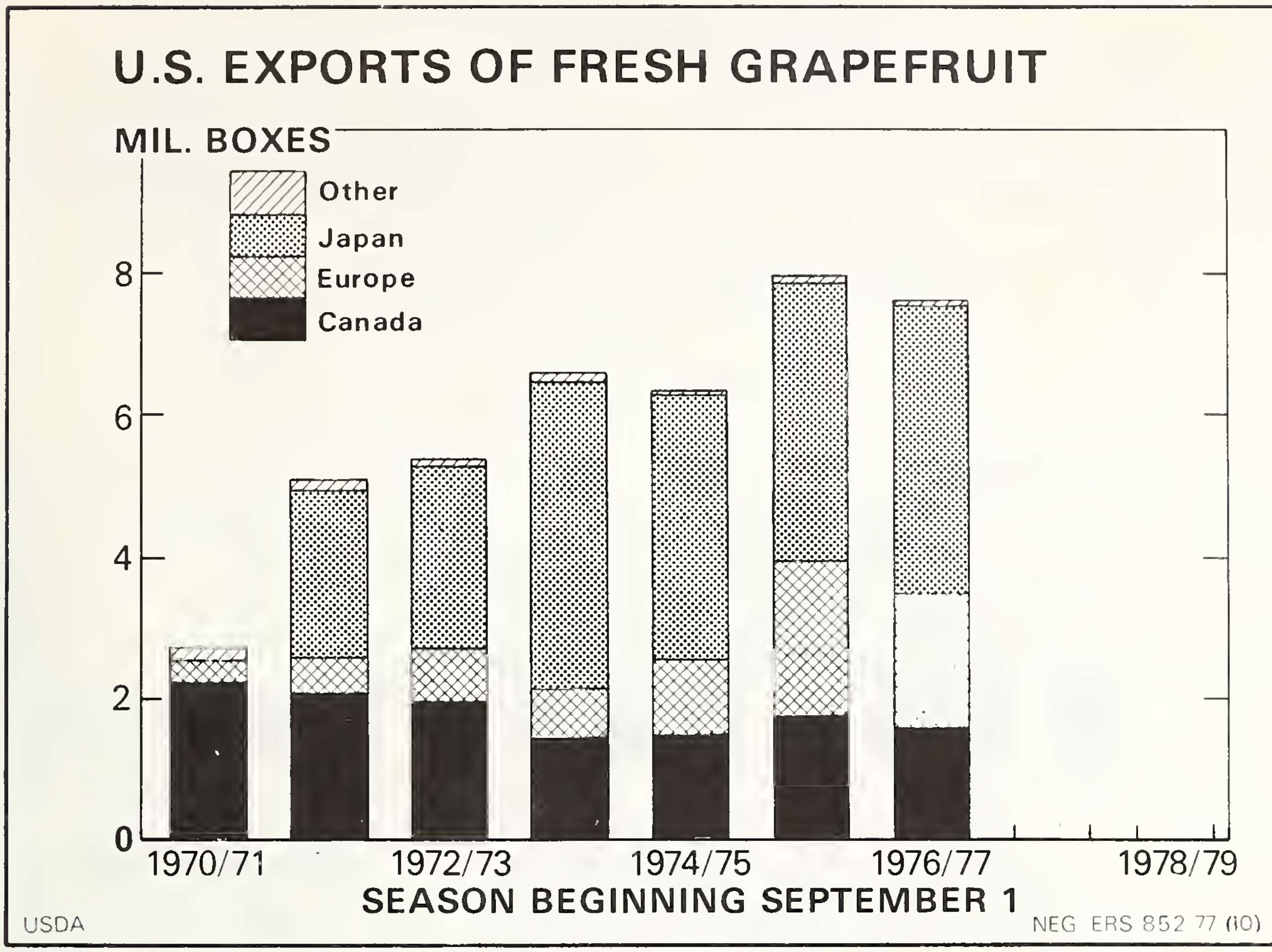
The average U.S. grower price (equivalent on-tree returns) for all grapefruit dropped to $1.31 per box, down from $1.40 a year earlier. Grower prices for fresh grapefruit were up sharply and averaged $2.68 per box while returns for processing were down to 47 cents per box. Adequate stocks of processed grapefruit products at the start of the 1976/77 season weakened processor demand early in the season. However, after the freeze in January of 1977, movement of processed grapefruit products increased and this was reflected in higher returns to growers for processed grapefruit products.

Exports Decline Slightly

Export shipments of 7.6 million boxes during 1976/77 registered a slight decline from the record 7.8 million boxes the previous season. Shipments to Europe and Canada decreased, but U.S. exports to Japan and other countries increased 3 percent. Shipments to Japan—which has developed into our major customer—totaled more than 4 million boxes in 1976/77. U.S. exports are expected to resume their upward trend during the 1977/78 season in view of the record large crop in Florida, likely lower market prices, and strong foreign demand.

Market Prospect

Carryover stocks of most processed grapefruit products are up going into the 1977/78 season. Both chilled and frozen concentrated grapefruit juices have shown good growth patterns in recent years. Processor demand for the new crop could be good.



Domestic movement of fresh grapefruit during 1977/78 is expected to expand and exports should also register a gain over 1976/77. The export market is of vital importance to domestic producers. In view of the record crop in prospect, prices for grapefruit are expected to decline to levels moderately below last year. However, improved export prospects this season might curtail downward price pressure.

Lemons

Large Crop in Prospect

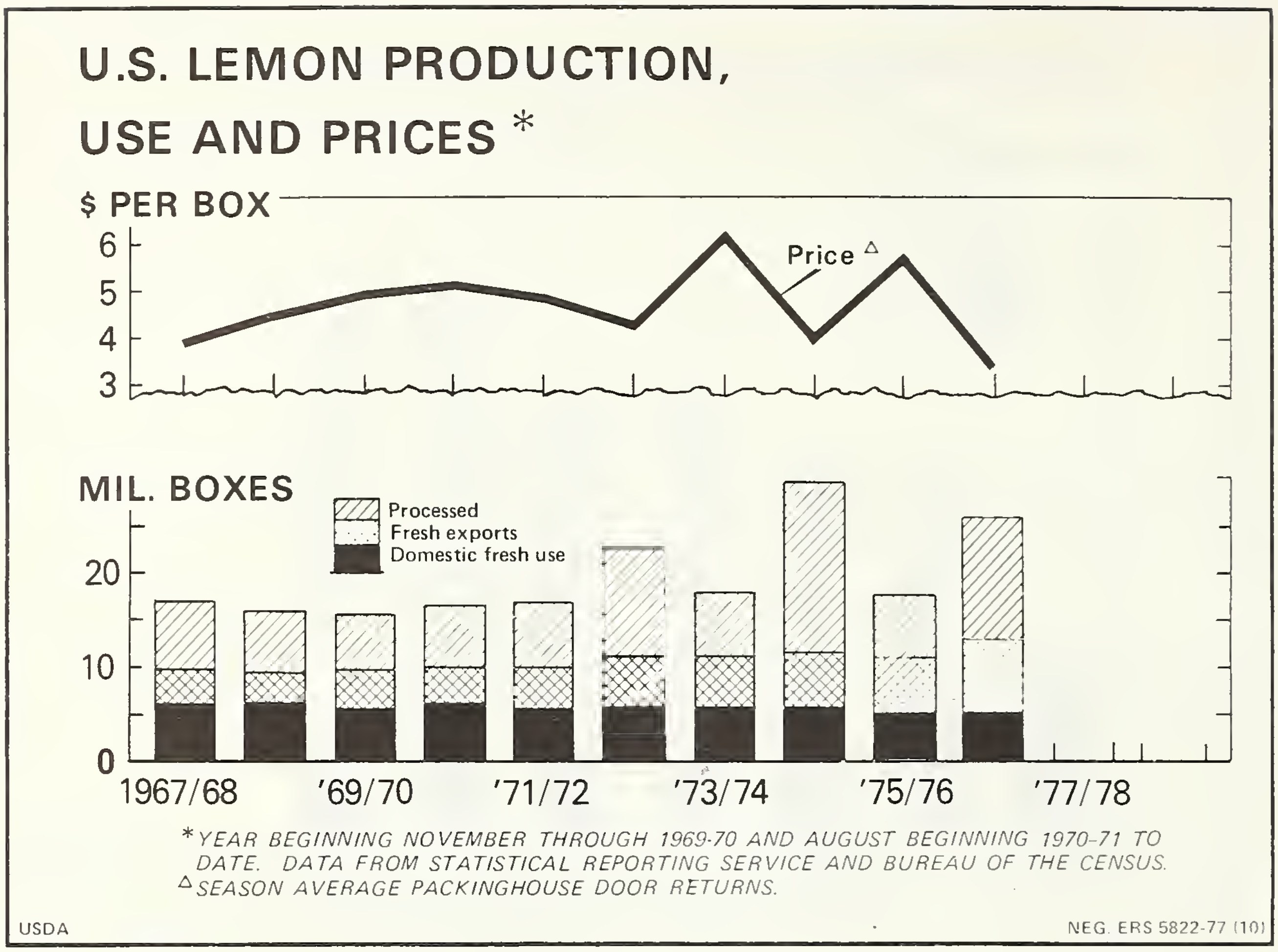
The Arizona-California lemon crop is forecast at 25.3 million boxes, 1 percent less than last year, but 44 percent greater than the 1975/76 crop. In mid-October, harvest was well underway in both States and quality was good. Arizona's crop, at 5.3 million boxes, is up slightly over last year, while California's crop, at 20 million boxes, will be down 3 percent.

Total movement this season through early October was slightly higher than a year ago, reflecting an earlier season and generally good weather througout the country. Shipments to export markets, so far this season, are down 6 percent from a year earlier, but deliveries to both the fresh and processing markets have been running ahead of a year ago. Reflecting a slightly smaller crop with a smaller proprotion of large lemons than usual, f.o.b. prices for fresh lemons so far this season have averaged 13 percent higher than last year. Prices during the 1977/78 season are expected to average moderately higher than during the previous season.

During the 1976/77 season, slightly more than half of the 25.6 million boxes of U.S. lemons was sold to the fresh market. Total fresh use was the highest on record because of the large shipments to domestic fresh markets and the largest exports on record. Processing use was also up. As a result of the large crop last year, the season average price received by growers was $1.52 per box (equivalent on-tree returns) compared with $4.07 received a year earlier for a very small crop. This year's crop, which upsets the biennial production pattern of lemon trees, should yield a slightly higher price than last year because both domestic and export markets for fresh lemons appear to be strong and processing usage will be down.

Other Citrus Fruit

The first forecast for U.S. tangerine production is placed at 6.0 million boxes, 4 percent greater



than last season. Slightly larger crops are predicted for all producing areas.

The Florida tangerine forecast of 3.4 million boxes includes only that portion of the crop expected to reach a size of 210 fruit per 4/5 bushel carton by December 1. California expects a crop of 1.9 million boxes, slightly larger than last year. The Arizona crop is expected to be up 12 percent.

Tangerines are a fresh market crop, usually two-thirds or more going to fresh outlets. Despite the larger crop last year, the season average price for fresh use to U.S. growers in 1976/77 was $5.75 per box (equivalent on-tree return), 17 percent higher than the previous year. Grower returns are higher for tangerines in Arizona and California than in Florida, where some tangerines are processed for juice.

Florida Temples are forecast at 5.2 million boxes, up more than one-third over last year's freeze-damaged crop. The marketing season for Temples usually begins in December and is completed by May. The crop was especially susceptible to the freeze which occurred January 18-20, 1977. A larger proportion of the crop, 69 percent, was salvaged by processing than usual. Grower returns for processing dropped to 45 cents per box (equivalent on-tree return) a third of the year-earlier price. The drastic price reduction was caused by the larger quantity of fruit to be salvaged, the need to salvage it quickly, and the sharply reduced juice yield of the freeze-damaged fruit. Grower prices are expected to be sharply higher this year because of low processor stocks and high level of demand for Temples.

The Florida tangelo crop is forecast at 4.8 million boxes (excluding K-early citrus fruit). This is the same as last year, but 13 percent below the 1975/76 season. About half of the tangelo crop is usually sold on the fresh market. During the 1976/77 season, grower returns for fresh use averaged $2.05 per box (equivalent on-tree returns) up slightly from returns for the record large crop of a year earlier. Prices should average slightly higher this year.

PROCESSED CITRUS FRUIT

Processing Use Record Large

With the record large 1976/77 citrus crop, utilization for processing reached another record of 11.5 million tons, 8 percent above the record set the previous year. Processing accounted for three-fourths of total utilized production, also a new record. More than four-fifths of the oranges, 62 percent of the grapefruit, and 49 percent of the lemons were processed.

In Florida, oranges used for processing accounted for 95.2 percent of utilized production in 1976/77. The percentage of oranges (including tangelos, Temples, and honey tangerines) processed for frozen concentrated orange juice (FCOJ) reached 80 percent, down slightly from a year before, but the quantity of oranges was a record high. In addition, the quantity of oranges used for chilled products was the largest ever. Florida's record grapefruit crop also resulted in increases in processing use. The share used for processing increased to 68 percent, up from 59 percent a year earlier and the previous high of 65 percent in 1970/71.

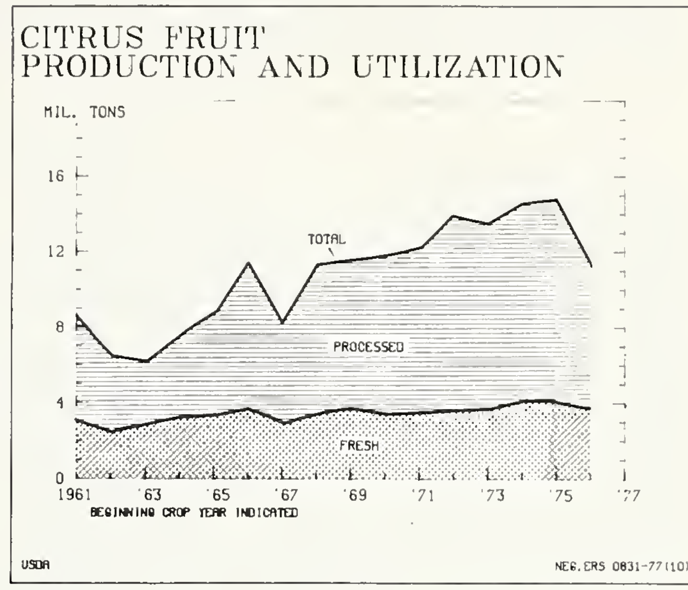


Table 4—Oranges, grapefruit, and tangerines processed, Florida, 1969/70 through 1976/77[1]

Crop and season	Frozen concentrates	Chilled products: Juice	Chilled products: Sections and salads	Other processed[3]	Total processed
	1,000 boxes				
ORANGES:[2]					
1969/70	100,739	18,640	841	8,206	128,426
1970/71	103,521	19,772	703	8,834	132,830
1971/72	104,399	19,509	535	7,726	132,169
1972/73	132,210	20,465	654	8,949	162,278
1973/74	132,469	20,405	605	7,518	160,997
1974/75	135,512	22,761	526	7,580	166,379
1975/76	144,526	24,006	621	7,580	176,733
1976/77	147,772	27,217	378	8,821	184,188
GRAPEFRUIT:					
1969/70	4,579	1,824	1,158	15,577	23,138
1970/71	6,819	2,348	1,091	17,682	27,940
1971/72	8,725	3,206	994	17,036	29,961
1972/73	8,212	2,908	1,209	16,025	28,354
1973/74	8,732	2,715	1,118	16,804	29,369
1974/75	7,779	3,332	967	13,725	25,803
1975/76	8,987	3,919	1,054	14,771	28,731
1976/77	13,020	4,331	934	16,822	35,107
TANGERINES:					
1969/70	586	---	---	31	617
1970/71	1,000	---	---	39	1,039
1971/72	961	---	---	11	972
1972/73	961	---	---	21	982
1973/74	732	---	---	13	745
1974/75	889	---	---	---	889
1975/76	1,024	---	---	14	1,038
1976/77	959	---	---	24	983

[1] 1976/77 preliminary. [2] Includes tangelos, Temples, and honey tangerines. [3] *Oranges* and *grapefruit*, includes cannery juice, blend, sections, and salads; and *tangerines*, includes mostly blend products.

Source: Florida Canners Association.

In California, fresh sales remained the most important outlet for citrus fruit. Slightly more than three-fourths of the State's Navel crop was shipped to fresh market, and more than half of the Valencias. With a larger lemon crop in California in 1976/77, nearly 47 percent of the lemon crop was processed, up from 37 percent a year earlier. The proportion of the Texas crop processed jumped to nearly 49 percent, up from 39 percent a year earlier.

Frozen Concentrates

Florida's 1976/77 pack of FCOJ amounted to 158.0 million gallons, substantially below a year ago. This small pack was caused by the severe January freeze which seriously reduced the juice yield of oranges. Processors recovered only 1.07 gallons of 45° brix FCOJ per box from the 1976/77 crop, compared with 1.29 gallons in 1975/76 and 1.31 gallons in 1974/75. Juice yield is estimated to be 1.28 gallons per box for the 1977/78 crop.

Despite higher prices, movement of FCOJ has been very good. In anticipation of a record large 1976/77 crop, f.o.b. prices for FCOJ (unadvertised brands) had been as low as $1.60 per dozen 6-ounce cans last year. Immediately following the freeze most canners withdrew from the market. Major packers reentered the market with prices ranging from $2.20 to $2.40 per dozen 6-ounce cans, and on February 8, a major packer increased the price to $2.60 per dozen. In mid-October, the f.o.b. price stands at $3.05-$3.10.

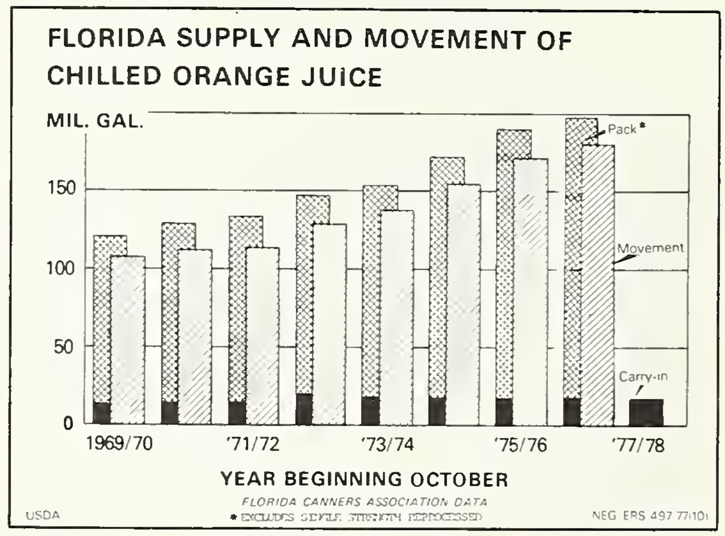
Despite this price escalation, movement of Florida FCOJ through October 8 had amounted to 181.4 million gallons, slightly above the rate of a year earlier. Consequently, packers stocks on October 8 stood at 49.1 million gallons, which is substantially lower than the industry would like to have. If movement continues at the current pace of 3.0-3.5 million gallons per week (retail, institutional, and bulk) carryover stocks at the end of the season could be as low as 25 million gallons. This prospect, plus the prospect of a smaller 1977/78 crop with juice yields of 1.28 gallons per box will result in a total supply moderately below the 1976/77 level. These smaller supplies will be reflected in retail prices throughout the 1977/78 season above last year's level.

Export shipments of FCOJ during the first 11 months of the shipping year (November 1-September 30) were up 20 percent from a year earlier. Sharply larger shipments to Sweden, The Netherlands, and the United Kingdom were largely responsilbe for an 11-percent rise in exports in Europe. Exports to Canada, our largest customer were up 19 percent. Our exports have been assisted by a reduction in exports of Brazil, our major competitor and the largest exporter of concentrated orange juice.

Excluding reprocessed gallonage, the 1976/77 pack of frozen concentrated grapefruit juice totaled 12.4 million gallons, up nearly one-third from 1975/76. Because of a smaller carryin at the beginning of the season and strong sales—which continue to increase each year—the frozen concentrated grapefruit juice stocks on-hand in mid-October were not burdensome at only 16 percent larger than a year earlier.

Chilled Products

Florida's pack of chilled orange juice for the 1976/77 season reached another record high of 178.7 million gallons (excluding single-strength reprocessed) 2 percent more than last season. Total domestic movement also set a record of 175.9 million gallons, in spite of higher prices. The U.S. retail price of chilled orange juice averaged 59.3 cents per quart during the 1976/77 season (October through September) compared with 55.1 cents during the same period a year ago. Foreign demand declined slightly. However, the larger movement more than offset larger carryin and pack leaving carryover one-fifth smaller than a year earlier.



Canned Citrus

The total pack of canned citrus products in Florida for the 1976/77 season totaled nearly 33 million cases (24-2's) only slightly less than last season. Movement was down slightly, particularly in canned grapefruit juice. The slackening movement may be attributed to higher prices or to a continuing shift in consumer preferences from canned to the frozen and chilled products. The current list f.o.b. Florida cannery prices of single-strength canned orange juice (unsweetened) have been steady at $5.85-6.10 per case (one dozen 46-ounce cans) compared with $5.20 a year ago. However, carryover of canned citrus products at the end of the 1976/77 season was slightly larger than a year earlier, despite a moderately smaller carryin at the beginning of the season.

In view of the large Florida grapefruit crop for the 1977/78 season, the pack of canned grapefruit juice (the leading canned citrus item) is expected to be larger than in 1976/77. Thus, with larger inventories at the beginning of the 1977/78 season, the total supply of canned citrus products will be ample. Prices should average slightly to moderately lower during the marketing season.

FRESH NONCITRUS

The 1977 noncitrus fruit crop is forecast at 11.14 million tons, slightly below last year's level, and 4 percent below 1975. However, cold storage holdings of fresh noncitrus fruit at the beginning of October were considerably larger than last year. Shipping point prices for most fresh noncitrus fruit are generally above a year ago. With the prospective good demand from processors, prices received by fruit growers are expected to average at levels above the 1976/77 season.

Table 5—U.S. noncitrus fruit: Total production, 1975, 1976, and indicated 1977

Crop	1975	1976	1977
	1,000 tons		
Apples	3,748	3,198	3,440
Apricots	183	155	145
Cherries, sweet	152	173	147
Cherries, tart	145	73	107
Cranberries	104	120	108
Grapes	4,379	4,304	4,195
Nectarines	111	133	130
Peaches	1,421	1,509	1,446
Pears	748	847	756
Prunes and plums	650	630	661
Total	11,641	11,142	11,135

Source: Crop Production, SRS.

Apples

Larger Crop Expected

The October 1 forecast of the 1977 U.S. apple crop is 6.9 billion pounds. This is 8 percent above last year's freeze-damaged crop, but 8 percent below the record 1975 total. Since August 1, prospects improved in the East and Central regions but declined in the important producing areas in the West. The following table shows the 1977 apple crop by regions, compared with apple production in 1975 and 1976.

Larger crops are reported for every State in the East except Massachusetts and Georgia which remain unchanged. New York, the leading apple State in this region, expects a crop of 900 million pounds, up almost a tenth from last year. Likewise, a larger apple crop is expected for each State in the Central region except Minnesota and Ohio. Michigan, the major apple-producing State in the region, expects a crop of 540 million pounds, 13 percent above 1976. The Western region, now expects a crop slightly less than the large 1976 output. Hot August weather in Washington retarded sizing and contributed to the reduction in prospects. However, Washington, the No. 1 U.S. apple-producing State, still expects a record 2,270 million pounds, up slightly from 1976.

Table 6—Apples: Regional production, 1975, 1976, and indicated 1977

Area	1975[1]	1976[1]	Indicated 1977
	Billion pounds		
East	3.12	2.35	2.73
Central States	1.30	.87	.99
West	3.07	3.17	3.16
Total U.S.	[2] 7.50	[2] 6.40	6.88

[1] Includes unharvested production and excess cullage (million pounds): United States 1975—429.8; 1976—6.3. [2] Total does not add due to rounding.

Source: Crop Production, SRS.

Market Prospects and Prices

Because of the late harvest, shipments of fresh apples are running moderately behind last year's pace. Even with a larger crop, available supplies of apples for fresh market are not likely to be substantially larger. Processor demand is expected to remain strong during the 1977/78 processing season as processor inventories of canned apples and applesauce are low.

Opening f.o.b. prices for fresh apples were generally mixed at major shipping points. Prices generally have continued to fall to levels slightly to moderately below a year ago, but in Michigan and Washington f.o.b. prices have advanced to levels moderately above a year ago. Mid-October quotations for Red Delicious apples by major producing areas are shown in the table below.

Table 7—Red Delicious Apples: Shipping point prices, selected regions, 1976 and 1977

Shipping points	Mid-October F.O.B. prices		Units
	1977	1976	
Western Michigan	6.63	6.21	Per carton, U.S. Fancy, 2¼" up, 12-3 lb. film bags.
Appalachian District	5.75	6.50	Cartons, U.S. Fancy or better 12-3-lbs, film bags, 2¾.. up.
Yakima Valley, Washington ..	9.44	8.63	Per carton, tray pack, Wash., State Extra Fancy, 80-125's.

Source: F.O.B. prices, AMS.

Prices of fresh apples are likely to decline further as a result of larger supplies, but good processor demand combined with a smaller prospective citrus crop, could dampen the downward pressure on prices. In addition, foreign demand for our fresh apples looks favorable. Apple production in Western Europe for 1977 is expected to be nearly one-fifth below the previous season which was considered normal. Output in the two key exporting countries, France and Italy, is down 24 percent and 16 percent, respectively, from a year ago. Production in West Germany, a key importing country on the Continent, is down 23 percent from last year. Export prospects to Canada, an important customer, may be off somewhat as the Canadian apple crop is expected to be up moderately from the 1976 level.

The 1976/77 retail price of fresh apples averaged considerably above the low levels of the 1975/76 season. However, retail prices of fresh apples have declined in response to the seasonal increases in supplies. The BLS September retail price of fresh apples fell to 38.3 cents per pound from 44.6 cents in August, but is still moderately above last year.

The larger crop prospects in major processing States will increase the available supplies for processing use relative to a year ago. Offering prices for apples to be used in processing have been below the high levels of last season. Many processors in the East and Midwest have agreed to pay $5.75-$7.00 per hundredweight (cwt.) for processing variety apples, U.S. No. 1 canner grade, 2½ inches and up, delivered to processors. Last year's initial prices were $8.75 per cwt. However, in the West, apple prices for processing are generally slightly to moderately higher than last year depending on the variety and size. In California, processing apples are quoted at between $95 and $140 per ton compared with $90 and $110 a year ago.

Avocados

The forecast of avocados for certified shipment from Florida during the 1977/78 season is estimated to be 380,000 bushels. This is the smallest crop in more than a decade and is 54 percent below 1976/77. This reduction in crop size follows the severe cold weather that hit Florida including the Homestead fruit area, in mid-January. Young trees and non-irrigated groves were particularly hard hit. The major portion of the harvest will be from irrigated groves.

Because of the smaller crop, shipments to the end of September were 174,000 bushels, down from last season when 272,400 bushels had been shipped. Consequently, f.o.b. prices for avocados at South Florida points have averaged sharply above year-earlier levels. In mid-October, shipping point prices for Florida avocados, Greenskin Varieties, size 8-16, were quoted at $6.63 a flat, compared with $3.88 a year earlier.

The first forecast for the 1977/78 California avocado crop is 2,990,000 bushels, down more than one-third from the previous season. Alternate bearing characteristics account for most of the estimated reduction in crop size. Demand for avocados is very strong. Total unloads of fresh California avocados at 41 major cities during the first ten months of 1977 were running almost more than double the same period a year ago.

Bananas

U.S. imports of bananas during January-August 1977 at 1.4 million metric tons were up slightly from 1976. Costa Rica is still our top supplier, but our imports from there during the first 8 months of 1977 were down almost one-fifth from the corresponding period a year ago. It provided only one-fourth of our total imports compared with almost one-third last year. Honduras was our second major source of bananas with a 24-percent share.

Because of larger total imports during July and August, retail prices of bananas have declined from the record high of 27.4 cents per pound recorded each month during the March-May period. The September price of 24.1 cents per pound was still slightly above a year ago. The seasonal increase in domestic supplies of fresh fruit could weaken retail prices of bananas further.

Cherries

Sweet Cherry Output Down

The U.S. sweet cherry crop totaled 147,100 tons, off 15 percent from last year's record output. Smaller production was recorded for all the producing States except Colorado and Michigan. Washington, the leading sweet cherry State, produced

46,300 tons, off 15 percent from last year, while California production at 27,000 tons, was approximately half of last year's quantity.

In response to the smaller crop, prices received by growers for the 1977 sweet cherry crop averaged $530 per ton, up from $384 a year ago. Higher prices were recorded for all the States with sharply higher prices reported for California, Montana, New York and Washington.

The smaller 1977 sweet cherry crop resulted in a substantial decrease in shipments to fresh markets, while movement to processors increased slightly. The following table shows the utilization of the U.S. sweet cherry crop during the last 5 years.

Sharply Larger Tart Cherry Crop

The 1977 tart cherry crop in the United States totaled 213.1 million pounds, 45 percent above the 1976 freeze-damaged crop. Michigan, the leading State, produced 162 million pounds, compared with 90 million pounds in 1976. Altogether, the Great Lake States produced 192.5 million pounds in 1977, a 63-percent increase over last year. The Great Lake States account for 90 percent of the U.S. tart cherry crop.

Despite a larger crop, prices received by growers for the 1977 tart cherry crop averaged 29.2 cents per pound, up from 25.1 cents a year ago. Contributing to substantially higher prices were very low carryover stocks of canned and frozen tart cherries and active processor demand. Consequently, substantially larger quantities of tart cherries were used for canning and freezing. The following table shows the utilization of tart cherries during the last 5 seasons.

Cranberries

The 1977 production of cranberries is forecast at 2.16 million barrels, a slight decline from the August 15 estimate and one-tenth less than last year's large crop. Reductions from a year ago are expected in Massachusetts, New Jersey, and Wisconsin.

Because of a smaller crop, shipping point prices at Cape Cod, Massachusetts opened higher at $6.35 for Early Blacks in cartons of 24 1-pound packages

Table 8—Sweet cherries: Production, utilization, price, and value, 1973-77 crops

Crop	Production[1]		Utilization				Price per ton	Value of utilized production
	Total	Utilized[2]	Fresh	Processed (fresh equivalent)				
				Canned	Brined	Other[3]		
	Thou. tons						*Dol.*	*Thou. dol.*
1973	157.6	153.6	82.8	13.0	53.9	3.9	367	56,395
1974	143.6	143.6	66.6	14.8	51.5	10.6	448	64,310
1975	151.9	151.9	77.5	8.9	60.3	5.2	411	62,472
1976	172.9	167.7	95.1	11.2	51.4	10.0	384	64,464
1977	147.1	145.8	72.2	11.1	51.6	10.9	530	77,230

[1] Difference between total and utilized is excess cullage and quantities not harvested for economic reasons. [2] Some totals do not add due to rounding. [3] Includes frozen, juice, jelly, etc.

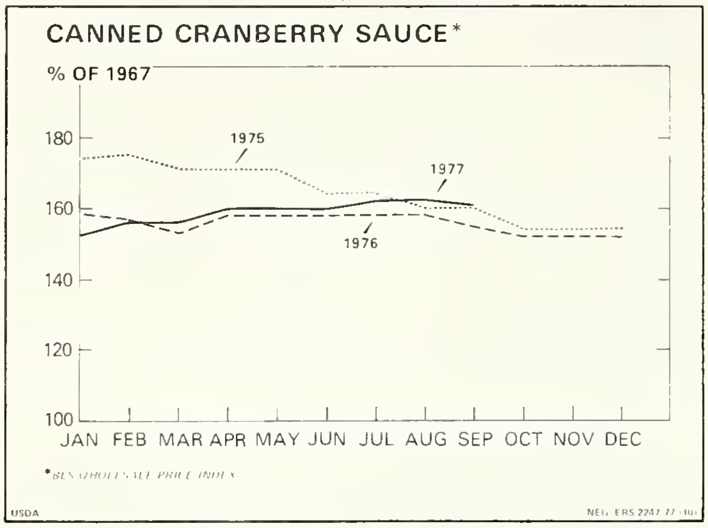
Source: Crop Production, SRS.

Table 9—Tart cherries: Production, utilization, price, and value, 1973-77 crops

Crop	Production[1]		Utilization				Price per ton	Value of utilized production
	Total	Utilized	Fresh	Processed (fresh equivalent)				
				Canned	Frozen	Other[3]		
	Thou. tons						*Dollars*	*Thou. dollars*
1973	87.6	87.0	2.6	23.5	57.5	3.4	377	32,776
1974	132.4	132.3	2.2	44.9	81.3	3.9	369	48,881
1975[2]	145.2	123.1	3.6	40.8	74.6	4.1	206	25,349
1976	73.3	73.3	3.0	18.6	49.1	2.6	502	36,806
1977	106.6	106.6	3.3	31.4	69.2	2.7	584	62,224

[1] Difference between total and utilized is excess cullage and quantities not harvested for economic reasons. [2] 1975 tart cherry production, price and value of production include 1975 crop reserve pool quantities sold during 1975-76 market season. [3] Includes juices, wine, jam, etc.

Source: Crop Production, SRS.



compared with $5.75 a year ago. Season opening prices for fresh Massachusetts cranberries in both New York and Chicago wholesale markets were moderately higher than a year earlier. They are expected to decline as the season progresses.

F.o.b. prices for canned cranberry sauce have been moderately above year-earlier levels but declined slightly in September. The BLS wholsale price index for canned cranberry sauce (No. 300 can) averaged 161.4 (1967=100) for September 1977, 4 percent higher than last year.

Grapes

Slightly Smaller Grape Production

This season's U.S. grape production is forecast at 4.2 million tons, 3 percent under the 1976 total. In California, production is expected to total 3.9 million tons, only slightly ahead of a year ago. Larger crops of wine and table varieties more than offset smaller output of raisin varieties.

Total grape production from States other than California and Arizona is now estimated at 283,720 tons, down 30 percent from 1976. Prospects in all other States except New York remained unchanged from August. New York, the second largest producing State, estimated a crop of 98,000 tons, approximately half of last year's quantity. Substantial decreases from last year in grape production are also recorded for Ohio and Pennsylvania. Most of the crops in these States are Concord varieties which are largely used for canned or frozen concentrated grape juice although some go into wine.

Market Prospects and Prices

Because of the late season, shipments of fresh grapes totaled 14,144 carlots through mid-October compared with 17,198 during the same period last season. Consequently, shipping point prices for California grapes have been substantially above last year. In Kern County, California, Ribier was

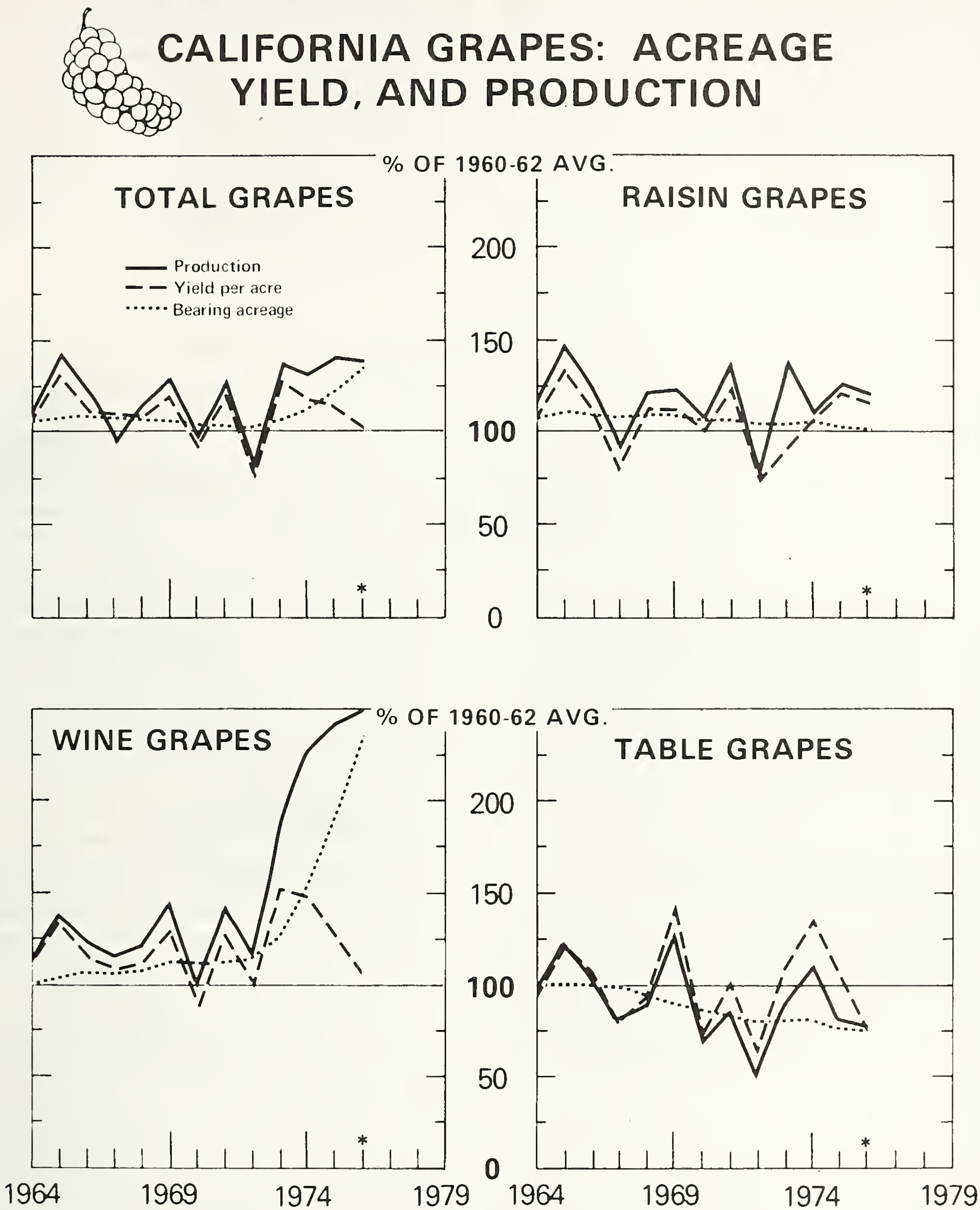
Table 10—Grapes: Total production and season average prices received by growers in principal States, 1975, 1976, and indicated 1977 production

State	Production			Price per ton	
	1975[1]	1976[1]	1977	1975	1976
	Tons	*Tons*	*Tons*	*Dollars*	*Dollars*
New York	153,000	185,000	98,000	201.00	164.00
New Jersey	1,200	750	900	188.00	210.00
Pennsylvania	48,000	58,000	30,000	168.00	158.00
Ohio	14,600	15,000	6,000	194.00	162.00
Michigan	56,000	14,500	26,000	131.00	162.00
Missouri	2,750	1,750	3,000	242.00	228.00
North Carolina	4,400	4,580	4,620	255.00	266.00
Georgia-South Carolina	4,800	4,950	4,900	208.00	209.00
Arkansas	10,500	6,500	10,300	196.00	189.00
Arizona	12,300	12,400	11,000	595.00	725.00
Washington	110,200	111,000	100,000	149.00	114.00
California:					
Wine	1,322,000	1,355,000	1,500,000	110.00	135.00
Table	434,000	406,000	450,000	218.00	216.00
Raisin	2,205,000	2,129,000	1,950,000	138.00	153.00
Dried[2]	284,000	258,000	—	665.00	680.00
Not dried	955,400	989,000	—	119.00	151.00
All	3,961,000	3,890,000	3,900,000	137.00	153.00
United States	4,378,750	4,304,430	4,194,720	142.00	155.00

[1] Includes unharvested production and excess cullage. (tons): U.S. 1975-1,280, 1976-299,350. (287,000 tons fresh equivalent raisin type in California laid, but not harvested due to severe weather damage). [2] Dried basis, 1 ton of raisins is equivalent to 4.40 tons of fresh grapes for 1975 and 4.42 for 1976.

Source: Crop Production, SRS.

CALIFORNIA GRAPES: ACREAGE YIELD, AND PRODUCTION



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quoted at $8.00 per 23-pound lug in mid-October, compared with $6.25 a year ago. More Thompson Seedless grapes are expected to be dried for raisins. There is virtually no carryover of raisins from last year when the unusual September rain destroyed much of the raisin crop. Fresh grape prices could remain moderately to substantially above last year because of strong demand from raisin packers and wineries.

With the smaller quantity of grapes available for fresh market early in the season, retail prices of fresh grapes averaged $1.01 per pound in August compared with $0.85 a year ago. Prices have declined seasonally, to $0.73 in September, but were substantially higher than last year.

With production of standard quality raisins increasing to the normal range after last year's very short crop, the field price for California raisins has been settled lower than last year. The Raisin Bargaining Association offered prices for free tonnage natural Thompson Seedless at $840 per ton and Zante currants at $800 per ton, and handlers accepted. This compares with $1,050 per ton for both natural Thompson Seedless and Zante currants a year ago.

Winery prices to growers for good quality grapes have been above year-earlier levels despite a larger crop of wine varieties. As expected, prices varied greatly by producing areas and varieties of grapes. In early October, the wine grape prices for Thompson Seedless in most areas ranged from $100 to $105 per ton, with no sugar stipulated, compared with $85 per ton a year ago.

Drying Expected Above Year-Earlier Levels But Crushing Lagging

Raisins delivered to handlers are running considerably ahead of last year's pace. Through mid-October, deliveries amounted to 155,324 tons, compared with 41,311 tons during the same period last season. With the prospective reduced demand for table varieties and smaller crushing of raisin varieties by wineries, total production of Thompson Seedless raisins is expected to be substantially above last year's small pack. Trade estimates placed this year's standard quality production of all types of raisins around 243,000 tons compared with about 142,000 tons last year. Thus, even with a small carryover of raisins from last season, the larger pack will boost supplies of raisins substantially during the 1977/78 marketing season.

Reported use of California grapes for crushing through October 8 was 1.8 million tons (fresh basis), down slightly from last year. The lagging crush was attributed to the substantial decreases in raisin and table varieties while wine varieties increased moderately from last season. Crush data for 1976 do not include substantial quantities of sub-standard raisins used for brandy. Inventories of wine in California as of June 30 were slightly greater than a year ago. Prices for bulk wine have been good, and in mid-October were moderately above last year's low level. However, the smaller grape crops this year in States other than California, especially the Great Lake States are expected to result in a decreased crush of Concord and other American-type grapes.

Pears

Production Down Moderately

The final forecast of the Nation's 1977 pear crop placed production at 755,900 tons, 11 percent less than the record 1976 total, but still slightly above 1975. The decline is generally attributed to the smaller output of pears from the major producing areas in the Pacific Coast. The Pacific Coast's Bartlett pear crop is forecast at 526,000 tons, down one-tenth from last year as smaller crops were reported for all three Pacific Coast States. Production of other pears most of which are fall and winter varieties in the Pacific Coast, is forecast at 183,000 tons, down one-fifth from last year's record crop. However, pear output in other than Pacific Coast States is estimated to be up one-half from last year due mainly to sharp increases in the crops in Michigan and New York.

Fresh Shipments Down Sharply

With harvest of Bartletts later than last season, fresh pear shipments from the Pacific Coast States through mid-October have been running sharply less than last year. However, last year a large quantity of Bartlett pears were diverted to fresh market because of the cannery workers strike.

F.o.b. fresh Bartlett prices on the West Coast have shown a mixed pattern. In mid-October, the f.o.b. quotation for Bartlett pears at Lake County District, California, was $8.88 per box U.S. No. 1 90-150s compared with $8.81 a year ago, while prices in Yakima Valley, Washington averaged $8.50 per box U.S. No. 1, 90-135s compared with $8.88 a year ago. F.o.b. prices for D'Anjou pear at Yakima Valley, Washington were substantially higher than last year.

Smaller available supplies of Bartlett pears have resulted in higher prices for processing use. Growers and canners in California agreed to a field price of $120 per ton for No. 1 grade Bartletts compared with $105 in 1976. The Washington-Oregon

Canning Pear Association reported the cannery price for No. 1 Bartletts, 2½ inches and larger at $115 per ton, up 6 percent from a year earlier. Prices for fresh pears are expected to remain firm as the foreign market situation is also favorable. The 1977 pear crops in major producing countries such as France, Germany, and Italy are expected to be sharply less than last year's large crops. In addition, the expected substantial decline in winter pear production in the Northwest will also strengthen the late-season market.

Exports Down

Total pear production in Europe during 1977 is expected to be 27 percent below 1976. This could enhance our prospects for pear exports to the European Community (EC) this season. However, prospective exports to Canada, an important destination, are less favorable as a substantially larger Canadian pear crop is expected. Exports of fresh pears during the first 2 months of the 1977/78 season (July and August) amounted to 4,994 metric tons, 40 percent below the same period a year ago.

PROCESSED NONCITRUS

Despite a slightly smaller noncitrus crop, the 1977/78 pack of most noncitrus fruit is likely to be above that of a year ago. However, total supplies of canned noncitrus are still expected to be near last year's level because of smaller carryin stocks at the beginning of the season. Dried fruit supplies will be larger. Supplies of frozen fruit could be moderately above a year ago. However, with higher costs of raw materials and processing, prices of most processed noncitrus items at all levels are expected to remain firm.

Larger Canned Pack Likely

The 1977/78 pack of most canned noncitrus fruit will probably be larger than last year. Pack data for most canned noncitrus items are not available at this writing. Complete pack data for canned noncitrus items available so far this season indicate that the pack of canned apricots totaled 2.3 million cases (24 No. 2½'s), compared with 2.4 million cases last year. Because of substantially smaller carryin at the beginning of the season, total supply of canned apricots for the 1977/78 marketing season is one-fifth smaller than 1976/77. The total pack of canned clingstone peaches amounted to 27.6 million cases (24 No. 2½'s) compared with 22.8 million cases in 1976. Thus, even with a substantially smaller carryin at the beginning of the season, total supplies of canned clingstone peaches for this season will be considerably larger than in 1976/77.

The total pack of canned tart cherries amounted to 605,000 cases (24 No. 2½'s), up 38 percent from 1976, but is still only half of the pack in 1975. With a depleted stock at the beginning of the season, total supply of canned tart cherries is only one-fourth above year-earlier levels. Thus, supplies for the 1977/78 marketing year are still tight and prices at all levels are expected to remain firm. The pack of canned sweet cherries is near last year's level. But with the substantially smaller carryover stocks, total supplies of canned sweet cherries are the smallest in several years.

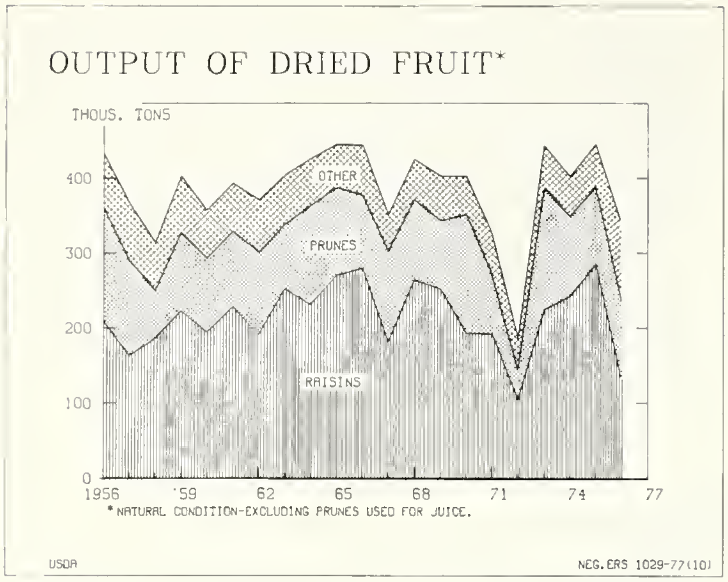
Carryover stocks of canned apples and applesauce were smaller than a year ago, but the larger apple crop in major processing areas will assure larger supplies of canned apple products. The total pack of canned Bartlett pears this season is expected to be smaller than last year. So far, 218,419 tons of Bartlett pears were delivered to California canners through September 20, compared with 251,579 tons through the same period in 1976.

In response to smaller supplies, wholesale prices of canned fruit during the first 9 months of 1977 have averaged moderately higher than a year ago. Likewise, retail prices of canned noncitrus fruit are also slightly to moderately higher. In view of higher costs of raw materials, processing, and marketing, prices of most canned fruits at all levels are likely to remain higher.

Exports of canned noncitrus fruit so far this season have shown a mixed pattern. Exports increased sharply from a year ago for canned peaches, pears, and fruit cocktail, and dropped for apricots, pineapples, and cherries. A smaller noncitrus crop in Western Europe is likely to enhance our exports, although the economic slowdown could be a moderating factor.

Dried Fruit

U.S. dried fruit production for the 1977/78 season is expected to total above that of last season. According to trade sources, total production of raisins is expected to be 243,000 tons, substantially above a year earlier when rains severly damaged the raisin variety grapes. Production of dried prunes, the other major dried fruit item, is currently estimated at 152,000 tons, moderately larger than last year.



Although the carryin of dried prunes at the beginning of the season was sharply smaller than last season, supplies for the 1977/78 season are expected to total slightly above year-earlier levels. Dried prune shipments are running moderately ahead of last year's pace. Export prospects for 1977/78 are very bright as France, an important customer for dried prunes, expects a substantially smaller crop. Spring frosts, excessive rain, and hail storms devastated the 1977 French dried prune crop. A sharp decrease in French dried prune output may enhance our exports to the European market. Last year, exports to Europe accounted for almost 73 percent of our total dried prune export shipments.

Although the carryover of raisins is below normal, total supplies of standard quality raisins during the 1977/78 marketing season are expected to be larger. Raisin prices are expected to be below last season's high levels. Foreign demand for raisins during 1977/78 looks promising as several major producing countries are expected to harvest smaller than the normal crops.

The Raisin Administrative Committee recommended to the USDA that free and reserve tonnages of 59 and 41 percent, respectively, be established for natural seedless and dipped seedless raisins.

Because of the reduced supplies, wholesale prices of dried prunes and raisins have been considerably above year-earlier levels. The BLS September wholesale price for dried prunes was $10.49 (16-ounce package, case of 24) compared with $9.42 a year ago. The wholesale price of raisins in September was $20.09 (15-ounce package, case of 24), up two-thirds from last year. The average prices for raisins are expected to be lower this season in view of the larger supplies.

Larger Frozen Fruit Pack

The U.S. pack of frozen deciduous fruits and berries is expected to surpass the 1976 pack of 587 million pounds. Through October 1, receipts of domestic strawberries by California freezers totaled 176 million pounds, sharply more than 140 million pounds a year earlier. During the first 8 months of 1977, imports of frozen strawberries amounted to 39,770 metric tons, more than double last year's small imports. Imports from Mexico are expected to remain above 1976 for the balance of the year as total production of strawberries during 1976/77 returned to more normal levels. Furthermore, for the 1977/78 strawberry season, the area planted to strawberries in Mexico is expected to reach 5,200 hectares, an increase of 11 percent from 1976/77.

Because of the larger crop, the freezer's pack of red tart cherries will be substantially above last year's small pack. The larger pack was due primarily to a substantial increase in Michigan which had a small crop in 1976. Through early October, freezers' receipts of blackberries from Oregon and Washington were substantially below year-earlier levels. Also, receipts of blueberries were sharply less than a year ago due mainly to the considerably small receipts from Michigan.

Larger Cold Storage Stocks

Cold storage holdings of frozen fruits and berries (excluding juices) on October 1 totaled 627 million pounds, one-fifth larger than a year earlier. Substantial increases in three items were chiefly responsible: strawberries at 202 million pounds were up two-fifths; apples, 61 million pounds, up

Table 11—Stocks of frozen fruit: End of September, 1974-77

Frozen fruit	1974	1975	1976	1977
	Thousand pounds			
Apples	54,734	34,694	41,290	60,752
Apricots	13,940	14,624	14,850	14,084
Blackberries	17,384	19,568	16,213	15,277
Blueberries	50,042	35,505	36,079	33,258
Boysenberries	5,200	6,435	3,910	3,804
Cherries[1]	93,738	122,713	72,721	93,622
Grapes	2,990	3,877	3,571	5,959
Peaches	58,171	41,175	66,664	67,953
Raspberries, Red	21,711	26,756	19,171	19,492
Raspberries, Black	2,220	2,654	2,734	1,620
Strawberries	191,769	174,401	141,804	201,848
Other frozen fruits	106,463	109,003	98,155	108,931
Total frozen fruits	618,362	591,405	517,162	626,600

[1] Includes both sweet and tart cherries.

Source: Cold storage, SRS.

almost one-half; and cherries, 94 million pounds, about one-third larger.

Despite a substantial increase in frozen stocks, the BLS wholesale price of frozen strawberries has been steady at $4.94 per dozen 10-ounce packages since July. Because of the larger supplies, current indications point to declining prices during 1977/78.

TREE NUTS

Larger Total Production

The total crops of the four major domestic tree nuts (almonds, filberts, pecans, and walnuts) are estimated to be 603,500 tons (in-shell basis), substantially larger than last season. A pecan crop sharply larger than the very small crop last year, plus large crops of almonds and walnuts, are responsible.

Almonds

Record Almond Crop

The almond crop in California is forecast at a record 255,000 tons, 9 percent above last year. The continued increase in almond production reflects a steady upward trend in bearing acreage and increased average yields per tree. California bearing acreage increased from 89,118 acres in 1960 to an estimated 275,390 acres in 1977.

The total movement of shelled almonds during the 1977 season (July-June) was a record 243.8 million pounds, up almost one-fourth from 1975/76. Demand for California almonds is expected to remain strong in 1977/78. The Spanish crop of almonds is down this year. Salable and reserve percentages of 100 and zero have been established under the Marketing Order. Sales in 1977/78 will approximate 280 million pounds, shelled basis, divided roughly 40 and 60 percent between the domestic and export markets, respectively.

In response to substantially larger supplies, average prices received by almond growers for the 1976 crop were $790 per ton in-shell weight, slightly lower than a year before. However, even with a larger crop in prospect this year, almond prices are expected to be higher than last year's which were the lowest since 1972. California handlers aggressively sold the 1977 crop on one-year contracts last summer and now most of the crop is essentially presold.

Movement may follow different patterns this year. Because of the drought, the crop is running predominantly to smaller kernel sizes. The smaller kernels are usually preferred by the confectionery industry, so movement to this outlet might be even stronger than usual. However, the quality of the

Table 12—Tree nuts: Production in principal States, 1975, 1976, and indicated 1977

Crop and State	1975	1976	Indicated 1977	Crop and State	1975	1976	Indicated 1977
	Tons	Tons	Tons		Tons	Tons	Tons
Almonds:				Pecans:			
California	160,000	233,000	255,000	North Carolina	1,100	1,400	1,200
				South Carolina	1,000	1,250	1,500
Filberts:				Georgia	37,500	26,000	35,000
Oregon	11,800	6,950	10,700	Florida	3,250	1,250	3,000
Washington	320	220	300	Alabama	10,000	2,500	20,000
2 States	12,120	7,170	11,000	Mississippi	3,000	750	7,000
				Arkansas	1,750	500	2,000
Walnuts, English:				Louisiana	16,000	1,000	12,500
California	198,000	183,000	210,000	Oklahoma	10,000	1,150	12,000
Oregon	1,500	700	800	Texas	34,000	10,000	26,000
2 States	199,500	183,700	210,800	New Mexico	6,550	5,750	6,500
				Total	124,150	51,550	126,700
Macadamia nuts:							
Hawaii	9,105	9,495	N.A.	Improved varieties[1]	55,350	38,650	69,250
				Native and seedling	68,800	12,900	57,450
				Total 4 tree nuts[2]	495,770	475,420	603,500

[1] Budded, grafted, or topworked varieties. [2] Excludes Macadamia nuts.

n.a.—Data not available temporarily.

Source: Crop Production, SRS.

crop is generally good, but there was some navel orange worm damage predominantly in the northern counties.

Filberts

Larger Filbert Crop

Filbert production in Oregon and Washington is forecast at 11,000 tons, 53 percent above last year but 9 percent below the 1975 crop. Nut sizes are large and quality is good. Oregon will produce 97 percent of the U.S. total crop.

Foreign production of filberts is also expected to be up this year. Spain's production is expected to be 14 percent greater than last year. Partially offsetting is Italy's crop which is estmated to be down 5 percent. Early estimates place Turkey's production at 250,000 metric tons.

If the current forecasts are correct there should be larger supplies of filberts in world markets this year than last. Turkey continues to maintain a high level of production. Support prices are expected to be increased over last year by the Turkish government. This may require a government subsidy for Turkey's exports.

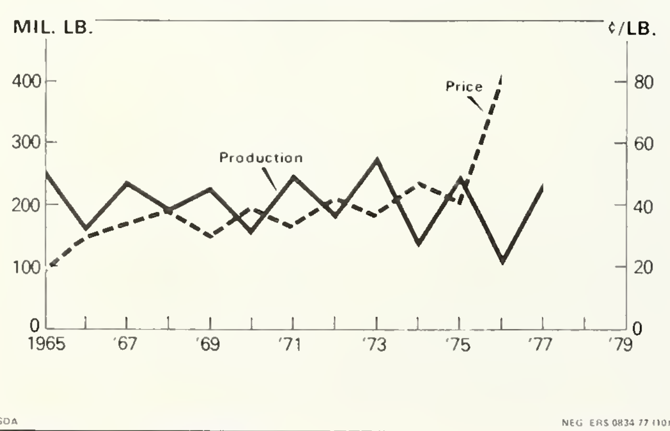
Increases in both domestic and foreign supplies point to lower U.S. price prospects for new crop filberts. Last season filbert growers received an average price of $640 per ton at first delivery point, an increase of 5 percent over 1975.

Pecans

Pecan Crop Up Substantially

As of October 1, U.S. production of pecans in 1977 is expected to total 126,700 tons, more than double last year's small crop and 2 percent more than in 1975. All producing States except North Carolina expect larger crops. In Georgia, the largest producing State, sizes will be smaller than normal because of early summer dry weather. In Texas, the second largest producer, hot, dry weather helped alleviate some insect problems but stressed trees, causing excessive nut drop.

U.S. PECAN PRODUCTION AND PRICES RECEIVED BY GROWER



Carryover stocks of pecans at the beginning of this season were at record lows. Consequently, prices paid to growers early in the season averaged near year-earlier levels. Smaller sizes and adequate supplies of pecans plus large crops of walnuts and almonds probably will keep grower prices below last year's record high levels. Prices received by U.S. pecan growers in 1976 averaged 81.5 cents per pound for all varieties, compared with 39.8 cents in 1975 and 47.1 cents per pound in 1974.

Walnuts

Record Large Crop

Production of walnuts in California and Oregon is forecast at 210,800 tons, 15 percent more than in 1976, and 6 percent larger than the previous record set in 1975. Shipments of shelled walnuts for the marketing year (August-July 31) passed 100 million pounds for the first time. Shipments for the marketing year totaled 203,000 tons in-shell basis. The carryout inventory is estimated at less than 30,000 tons, the smallest since 1973.

The Walnut Marketing Board administers the federal marketing agreement and order programs covering walnuts. It has recommended to the Secretary of Agriculture that three-fourths of the California walnut crop be made available to U.S. markets and a quarter be held in reserve for export. The Board's recommendations provide for an estimated domestic trade demand of 60 million pounds of inshell and 90 million pounds of shelled walnuts. The Board recommended that the entire reserve be released for export.

Nearly 76 million pounds of inshell, and 8 million pounds of shelled walnuts were exported during the last marketing year (August 1, 1976-July 29, 1977). Our major customers are Spain, West Germany, Italy, The Netherlands, and Canada. The long-run export picture for walnuts is bright since many of the Mediterranean producers have declining production trends due to losses of walnut trees to the lumber industries.

Grower prices per ton for walnuts in California averaged $633 last year. This is 35 percent higher than in 1975. In view of the small carryover from last year's near-record large crop, and prospects for good export markets this year, grower prices should average about the same as last year or slightly higher.

Other Nuts

U.S. Pistachio Nuts Increasing

Sharply larger tonnage of California pistachio nuts will be marketed this year. About 30,000 acres of pistachio trees were planted in California in recent years. Last year 2 million pounds of the nuts were marketed. Industry sources say 5 million pounds will be marketed during the 1977-78 marketing year, and they expect to market 80 million pounds by 1981. The California nuts are reported to be 40 percent larger than the nuts imported from Iran and Turkey.

Macadamia Nut Supplies Up

Indications are that the Macadamia crop in Hawaii will be up again this year. The 1976 crop totaled 9,495 tons. This is nearly 140 percent greater than ten years earlier and two-thirds more than the 1967-71 average. Increasing production has met with increasingly higher grower prices. In 1976, the farm price for Macadamia nuts in Hawaii was 36.9 cents per pound, up from 31.6 cents a year earlier.

Macadamia nut production is expected to continue to increase in the immediate years ahead as more and more trees become of bearing age and the yields per bearing tree increase as the trees become older.

* * * * * * *

YOU'RE INVITED

Don't miss the U.S. Department of Agriculture's Food and Agricultural Outlook Conference, November 14-17, in Washington, D.C.

You're invited to attend and actively participate in this year's proceedings which have been restructured to allow more time for questions and answers. So be there and join in when we preview the 1978 outlook for agriculture with leading authorities who will help you size up next year's uncertainties.

You'll benefit from the latest thinking in outlook sessions on the U.S. agricultural and general economies, world trade, weather, retail food supplies and prices, implications of new farm and food policy, farm inputs, food marketing and distribution, and the major farm commodities, including livestock and meat. This year, there will also be sessions on how outlook information is derived, and on natural resources and the environment.

Or, if consumer affairs are your bread and butter, attend the family living session for the latest on legislation, clothing, housing, health care, and food consumption.

A concluding general session on food and diets will have implications for both consumers and producers.

The Preliminary Program that appears at the end of this publication, is intended as an early guide to Conference times and topics. Please remember that it is subject to change.

The session on Fruits, Vegetables, and Tree Nuts will be held on Wednesday, November 16, at 3:30 p.m. in the auditorium of the Freer Gallery, 12th and Independence Avenue, S.W.

For a complete schedule of the Conference, call (202) 447-7255 or write: U.S. Department of Agriculture, ERS-Division of Information, Room 0054, South building, Washington, D.C. 20250.

Table 13—Seven citrus fruits: Production, use, and value, United States, 1969/70 through 1976/77[1]

Fruit and season	Production[2]	Utilization of production				Value of production
		Fresh		Processed		
		Quantity	Percentage	Quantity	Percentage	
	1,000 tons		*Percent*	*1,000 tons*	*Percent*	*1,000 dollars*
Oranges:						
1969/70	8,023	1,791	22.3	6,232	77.7	388,313
1970/71	8,205	1,767	21.5	6,438	78.5	463.506
1971/72	8,237	1,725	20.9	6,512	79.1	549,369
1972/73	9,737	1,697	17.4	8,040	82.6	603,305
1973/74	9,386	1,779	19.0	7,607	81.0	600,691
1974/75	10,241	2,151	21.0	8,090	79.0	653,759
1975/76	10,493	1,986	18.9	8,507	81.1	678,717
1976/77	10,595	1,790	16.9	8,805	83.1	648,552
Grapefruit:						
1969/70	2,186	950	43.5	1,236	56.5	120,994
1970/71	2,473	989	40.0	1,484	60.0	145,287
1971/72	2,627	1,090	41.5	1,537	58.5	185,890
1972/73	2,676	1,109	41.4	1,567	58.6	177,055
1973/74	2,692	1,131	42.0	1,561	58.0	157,673
1974/75	2,504	1,145	45.7	1,359	54.3	154,439
1975/76	2,850	1,317	46.2	1,533	53.8	154,802
1976/77	3,029	1,141	37.7	1,888	62.3	167,328
Lemons:						
1969/70	574	351	61.1	223	38.9	73,294
1970/71	625	368	58.9	257	41.1	81,960
1971/72	634	366	57.7	268	42.3	80,266
1972/73	844	417	49.4	427	50.6	97,126
1973/74	676	423	62.6	253	37.4	109,851
1974/75	1,118	438	39.2	680	60.8	113,226
1975/76	670	416	62.1	254	37.9	101,949
1976/77	973	496	51.0	477	49.0	87,538
Limes:						
1969/70	29	15	51.7	14	48.3	4,140
1970/71	35	16	45.7	19	54.3	4,136
1971/72	44	19	43.2	25	56.8	6,039
1972/73	44	21	47.7	23	52.3	6,710
1973/74	42	19	45.2	23	54.8	7,560
1974/75	44	20	45.5	24	54.5	8,382
1975/76	43	23	53.5	20	46.5	10,012
1976/77	40	21	52.5	19	47.5	11,610
Tangelos:						
1969/70	113	63	55.8	50	44.2	5,325
1970/71	122	73	59.8	49	40.2	5,643
1971/72	162	77	47.5	85	52.5	9,900
1972/73	140	65	46.4	75	53.6	7,812
1973/74	167	72	43.1	95	56.9	9,250
1974/75	212	107	50.5	105	49.5	12,361
1975/76	248	101	40.7	147	59.3	3,860
1976/77	216	103	47.7	113	52.3	9,696
Tangerines:						
1969/70	189	141	74.6	48	25.4	15,556
1970/71	234	163	69.7	71	30.3	18,386
1971/72	220	148	67.3	72	32.7	22,767
1972/73	223	142	63.7	81	36.3	20,729
1973/74	210	154	73.3	56	26.7	23,032
1974/75	28	159	69.7	69	30.3	23,618
1975/76	236	160	67.8	76	32.2	25,976
1976/77	249	164	65.9	85	34.1	29,850
Temples:						
1969/70	234	127	54.3	107	45.7	12,012
1970/71	225	100	44.4	125	55.6	13,900
1971/72	239	81	33.9	158	66.1	15,317
1972/73	230	111	48.3	119	51.7	15,606
1973/74	239	87	36.4	152	63.6	14,840
1974/75	239	86	36.0	153	64.0	14,575
1975/76	248	105	42.3	143	57.7	15,895
1976/77	171	53	31.0	118	69.0	8,740
Total:						
1969/70	11,348	3,438	30.3	7,910	69.7	619,634
1970/71	11,919	3,476	29.2	8,443	70.8	732,818
1971/72	12,163	3,506	28.8	8,657	71.2	869,348
1972/73	13,894	3,562	25.6	10,332	74.4	928,343
1973/74	13,412	3,665	27.3	9,747	72.7	922,897
1974/75	14,586	4,106	28.2	10,480	71.8	980,360
1975/76	14,738	4,108	27.8	10,680	72.2	1,001,211
1976/77	15,273	3,768	24.7	11,505	75.3	963,514

[1] Preliminary. [2] Production having value.

Data prepared from citrus production and utilization reports, SRS, USDA.

Table 14—Selected citrus fruit: Use for processing by percentages of total production, 1969/70 through 1976/77

State, variety, and season	1969/70	1970/71	1971/72	1972/73	1973/74	1974/75	1975/76	1976/77[1]
	Percent							
ORANGES:								
Florida:								
Temple	45.7	55.4	66.4	52.1	63.7	64.0	57.7	68.8
Early and midseason	89.7	90.0	91.2	92.6	93.4	92.3	93.4	94.7
Valencia	91.1	90.4	92.4	93.0	93.2	92.2	93.6	96.2
Total	90.4	90.2	91.8	92.8	93.3	92.3	93.5	95.2
California:								
Navel and miscellaneous	24.5	18.4	25.6	33.2	20.5	27.2	27.2	24.7
Valencia	41.0	43.4	48.7	50.4	35.7	43.5	44.5	44.8
Total	32.0	31.6	36.8	42.8	27.5	35.3	35.2	33.8
GRAPEFRUIT:								
Florida:								
Seedless	50.9	53.4	53.6	52.4	51.2	50.1	50.9	61.5
Pink	34.4	35.5	36.5	38.0	35.7	33.5	31.2	47.8
White	60.4	63.1	62.4	59.5	58.5	57.5	60.0	67.2
Other seeded	94.1	95.9	97.4	97.2	98.6	98.0	98.6	99.3
Total	61.9	65.1	63.7	62.4	61.1	57.9	58.5	68.2
Texas	39.1	41.2	37.6	46.3	49.5	36.3	32.1	47.7
TANGERINES:								
Florida	20.6	28.1	30.4	32.7	26.6	28.7	30.5	29.8
California	46.8	36.8	40.5	45.0	26.5	37.0	38.5	46.7
LEMONS:								
California	35.8	36.8	39.0	48.3	36.9	56.8	37.1	46.7
Arizona	52.4	59.4	57.5	59.4	40.2	73.3	43.2	58.2

[1] Preliminary.

Data prepared from citrus production and utilization reports, SRS, USDA.

Table 15-Florida oranges used for frozen concentrate

Crop year	Florida orange and Temple production	Used for frozen concentrates		Yield per box
	Million boxes	*Million boxes*[1]	*Percent*	*Gallons*
1969/70	142.9	100.7	70.5	1.24
1970/71	147.3	103.5	70.3	1.21
1971/72	142.3	104.4	73.4	1.29
1972/73	174.8	132.2	75.6	1.33
1973/74	171.1	132.5	77.4	1.30
1974/75	178.6	135.5	75.9	1.31
1975/76	186.7	144.5	77.4	1.29
1976/77	190.6	147.8	77.5	1.07

[1] Includes tangelos, temples, and honey tangerines.

Table 16—Citrus fruit: Season average equivalent returns per box received by growers, by variety and utilization, by State and total United States, 1974/75-1976/77 seasons

Variety, States and U.S.	1974/75						1975/76						1976/77					
	Equivalent P.H.D.[1]			Equivalent on-tree			Equivalent P.H.D.[1]			Equivalent on-tree			Equivalent P.H.D.[1]			Equivalent on-tree		
	All	Fresh	Proc.	All	Fresh	Proc.	All	Fresh	Proc.	All	Fresh	Proc.	All	Fresh	Proc.	All	Fresh	Proc.
	Dollars																	
ORANGES:																		
Florida:																		
Early and midseason	2.46	3.15	2.40	1.46	2.15	1.40	2.69	3.25	2.65	1.69	2.25	1.65	1.92	3.20	1.85	.87	2.15	0.80
Valencia . . .	2.82	3.05	2.80	1.82	2.05	1.80	2.88	3.25	2.85	1.88	2.25	1.85	3.32	5.10	3.25	2.27	4.05	2.20
All	2.62	3.11	2.58	1.62	2.11	1.58	2.78	3.25	2.74	1.77	2.25	1.74	2.46	3.79	2.39	1.41	2.74	1.34
Temple	2.75	3.45	2.35	1.68	2.35	1.30	2.89	3.50	2.45	1.79	2.40	1.35	2.30	3.95	1.55	1.18	2.80	.45
California:																		
Navel and misc.	3.53	4.83	.10	2.37	3.67	-1.06	3.12	4.18	.28	1.96	3.02	-.88	3.60	4.70	.26	2.36	3.46	-.98
Valencia . . .	2.93	4.43	1.00	1.77	3.27	-.16	2.80	4.17	1.10	1.60	2.97	-.10	3.25	5.10	.96	1.95	3.80	-.34
All	3.23	4.66	.65	2.07	3.50	-.51	2.97	4.18	.76	1.79	3.00	-.42	3.44	4.85	.68	2.18	3.59	-.60
U.S.[2]	2.75	4.13	2.34	1.72	3.04	1.33	2.80	3.84	2.52	1.77	2.74	1.51	2.66	4.46	2.24	1.56	3.25	1.18
GRAPEFRUIT:																		
Florida:																		
Seedless . . .	2.76	3.89	1.64	1.88	3.04	.72	2.49	3.34	1.68	1.58	2.49	.71	2.45	3.86	1.56	1.50	2.96	.58
Seeded	1.72	2.72	1.70	.87	1.87	.85	1.70	2.05	1.70	.85	1.20	.85	1.54	([3])	1.54	.64	([3])	.64
All	2.59	3.88	1.66	1.72	3.03	.76	2.37	3.33	1.69	1.47	2.48	.75	2.29	3.86	1.55	1.35	2.96	.60
Texas	2.30	2.90	1.25	1.95	2.55	.90	1.74	2.13	.93	1.36	1.73	.57	2.03	2.60	1.41	1.06	1.60	.46
California . . .	2.34	3.95	.65	1.60	3.19	-.12	2.11	3.49	.72	1.27	2.63	-.11	2.52	4.21	.40	1.64	3.31	-.47
Arizona	2.10	3.40	.80	1.40	2.70	.10	1.51	2.65	.70	.76	1.90	-.05	1.79	3.30	.40	.99	2.50	-.40
U.S.	2.51	3.71	1.49	1.72	2.96	.66	2.21	3.05	1.48	1.40	2.31	.61	2.25	3.60	1.41	1.31	2.68	.47
LEMONS:																		
California . . .	4.03	8.03	.98	2.43	6.43	-.62	5.65	8.45	.90	3.95	6.75	-.80	3.48	5.70	.95	1.58	3.80	-.95
Arizona	3.30	7.00	1.95	1.60	5.30	.25	6.64	11.00	.90	4.79	9.15	-.95	3.17	6.25	.95	1.27	4.35	-.95
U.S.	3.85	7.86	1.27	2.23	6.24	-.36	5.79	8.77	.90	4.07	7.05	-.82	3.42	5.79	.95	1.52	3.89	-.95
TANGERINES:																		
Florida	4.85	6.05	1.85	3.05	4.30	-.05	4.81	6.20	1.65	3.02	4.45	-.25	5.20	7.00	.95	3.29	5.05	-.85
California . . .	3.70	5.68	.33	2.92	4.88	-.47	4.64	7.01	.84	3.27	5.65	-.52	4.74	8.25	.72	3.38	6.89	-.64
Arizona[4]	4.73	6.35	.55	3.33	4.95	-.85	5.44	7.30	.85	4.09	5.95	-.50	6.25	8.20	.75	4.90	6.85	-.60
U.S.	4.50	5.98	1.17	3.04	4.54	-.28	4.85	6.52	1.33	3.21	4.91	-.36	5.17	7.47	.84	3.50	5.75	-.74
TANGELOS:																		
Florida	2.63	3.35	1.90	1.45	2.15	.75	2.52	3.20	2.05	1.42	2.10	.95	2.02	3.25	.90	.80	2.05	-.35
LIMES:																		
Florida	7.62	14.90	1.70	5.35	12.50	-.45	9.27	15.40	2.00	6.70	12.60	-.30	11.61	20.50	2.20	8.60	17.15	-.35

[1] P.H.D.—Packing-house door. [2] Excludes Temples. [3] Fresh sales insignificant. [4] Includes tangelos.

Data from Statistical Reporting Service.

Table 17—Frozen concentrated citrus juices: Florida canners' stocks, packs, imports, supplies, and movement, current season with comparisons

Item and season	Carryin	Pack		Imports and other supply		Supply		Movement		Stocks[1]
		To date[1]	Total season	To date[1]	Total season	To date[1]	Total season	To date[1]	Total season	
	1,000 gallons									
Orange:										
1975/76	50,759	186,265	186,265	16,840	17,237	253,864	254,261	178,971	200,552	74,893
1976/77	53,709	158,035		18,804		230,548		181,433		49,115
Grapefruit:										
1972/73	2,831	8,658	8,658	---	---	11,489	11,489	6,919	7,908	4,570
1973/74	3,581	9,026	9,026	---	---	12,607	12,607	6,845	7,710	5,762
1974/75	4,897	7,847	7,847	---	---	12,744	12,744	7,471	8,509	5,273
1975/76	4,235	9,316	9,316	144	211	13,695	13,762	9,295	10,456	4,400
1976/77	3,306	11,258		1,146		15,710		10,219		5,491
Tangerine:										
1972/73	208	1,072	1,072	---	---	1,280	1,280	1,050	1,069	230
1973/74	211	1,019	1,019	---	---	1,230	1,230	822	831	408
1974/75	399	1,147	1,147	---	---	1,546	1,546	1,065	1,153	481
1975/76	393	1,111	1,111	15	15	1,519	1,519	1,086	1,137	433
1976/77	382	926		21		1,329		740		589

[1] For the 1976/77 season, week ending October 8; 1975/76, October 16; 1974/75, October 18; 1973/74, October 19; and 1972/73, October 20. These respective dates include data through the 46th week of each season except 1976/77 (45th week).

Source: Florida Canners Association.

Table 18—Chilled citrus products: Packs, stocks, supply, and movement, Florida, 1972/73 through 1976/77

Item and season[1]	Beginning stocks	Pack[2]	Total supply	Season movement	Ending stocks
	1,000 gallons				
Orange juice, s.s.:					
1972/73	19,992	125,683	145,675	127,255	18,420
1973/74	18,420	135,313	153,733	137,347	16,386
1974/75	16,386	154,478	170,864	154,085	16,779
1975/76[3]	16,779	174,804	191,583	173,558	18,025
1976/77	18,025	178,685	196,710	180,903	15,807
Grapefruit juice, s.s.:					
1972/73	3,021	16,071	19,092	16,871	2,221
1973/74	2,221	17,376	19,597	17,916	1,681
1974/75	1,681	20,535	22,216	20,768	1,448
1975/76[3]	1,448	24,538	25,986	24,583	1,403
1976/77	1,403	25,074	26,477	25,111	1,366
Grapefruit sections:					
1972/73	321	2,051	2,372	1,989	383
1973/74	383	1,894	2,277	1,836	441
1974/75	441	1,634	2,075	1,737	338
1975/76[3]	338	1,787	2,125	1,891	234
1976/77	234	2,095	2,329	1,982	347
Orange sections:					
1972/73	427	804	1,231	945	286
1973/74	286	765	1,051	804	247
1974/75	247	791	1,038	920	118
1975/76[3]	118	1,126	1,244	1,027	217
1976/77	217	797	1,014	827	187
Citrus salad:					
1972/73	312	4,818	5,130	4,349	781
1973/74	781	4,268	5,049	4,163	886
1974/75	886	3,465	4,351	3,724	627
1975/76[3]	627	4,027	4,654	3,599	1,055
1976/77	1,055	2,532	3,587	3,098	489

[1] Season beginning approximately October 1. [2] Packs of chilled juices include products of fresh fruit and frozen concentrate and exclude reprocessed single-strength bulk. [3] 1975/76 season incorporates 53 weeks.

Prepared from reports of Florida Canners Association.

Table 19—Canned citrus juices and fruit: Florida canners' stocks, packs, supplies, and movement, current season with comparisons

Item and season[1]	Beginning stocks	Pack	Supply	Movement	Ending stocks
	1,000 cases, 24 No. 2's				
Juices[2]					
Orange:					
1972/73	1,795	13,670	15,465	12,578	2,887
1973/74	2,887	10,885	13,772	11,133	2,639
1974/75	2,639	10,737	13,376	11,349	2,027
1975/76[3]	2,027	10,635	12,662	10,746	1,916
1976/77	1,916	10,767	12,683	10,592	2,091
Grapefruit:					
1972/73	4,310	19,059	23,369	19,166	4,203
1973/74	4,203	20,576	24,779	18,780	5,999
1974/75	5,999	15,951	21,950	18,129	3,821
1975/76[3]	3,821	18,439	22,260	18,623	3,637
1976/77	3,637	18,029	21,666	17,194	4,472
Grapefruit reconstituted:					
1972/73	153	279	432	405	27
1973/74	27	160	187	153	34
1974/75	34	443	477	391	86
1975/76[3]	86	487	573	528	45
1976/77	45	780	825	575	250
Blend:					
1972/73	327	1,898	2,225	1,823	402
1973/74	402	1,782	2,184	1,702	482
1974/75	482	1,493	1,975	1,699	276
1975/76[3]	276	1,687	1,963	1,566	397
1976/77	397	1,308	1,705	1,517	188
Tangerine:					
1972/73	3	24	27	20	7
1973/74	7	18	25	19	6
1974/75	6	12	18	17	1
1975/76[3]	1	19	20	20	([4])
1976/77	([4])	35	35	20	15
Canned fruits:					
Grapefruit sections:					
1972/73	440	2,687	3,127	2,804	323
1973/74	323	3,027	3,350	2,645	705
1974/75	705	2,236	2,941	2,027	914
1975/76[3]	914	1,602	2,516	1,906	610
1976/77	610	1,722	2,332	1,950	382
Orange sections:					
1972/73	6	18	24	17	7
1973/74	7	17	24	15	9
1974/75	9	18	27	19	8
1975/76[3]	8	26	34	17	17
1976/77	17	10	27	21	6
Citrus salad:					
1972/73	144	131	275	203	72
1973/74	72	117	189	158	31
1974/75	31	206	237	152	85
1975/76[3]	85	112	197	126	71
1976/77	71	84	155	124	31

[1] Season beginning approximately October 1. [2] Single strength. [3] 1975/76 season incorporates 53 weeks. [4] Less than 500 cases.

Compiled from Florida Canners Association reports.

Table 20—Canned noncitrus fruit and juice: Canners' carryin, pack, supplies, and shipments, current season with comparisons

Item and season[1]	Carryin	Pack	Total supply	Total season shipments
	1,000 equivalent cases, 24 No. 2½'s			
Apricots:[2]				
1973/74	298	4,094	4,392	3,925
1974/75	467	1,987	2,454	2,218
1975/76	236	4,421	4,657	3,124
1976/77	1,534	2,387	3,921	3,051
1977/78	870	2,269	3,139	
Cherries, RSP:				
1973/74	9	579	588	583
1974/75	5	1,188	1,193	1,135
1975/76	58	1,273	1,331	1,283
1976/77	48	438	486	477
1977/78	9	605	614	
Cherries, sweet:				
1973/74	190	503	693	566
1974/75	127	623	750	460
1975/76	290	412	702	487
1976/77	215	464	679	551
1977/78	128	482	610	
Pineapple:				
1973/74	7,012	14,981	21,993	16,804
1974/75	5,189	13,913	19,102	14,928
1975/76	4,174	14,852	19,026	13,589
1976/77	5,437	17,270	22,707	15,709
1977/78	6,998			
	1,000 equivalent cases, 24 No. 2's			
Canned juice:				
Single strength pineapple:				
1973/74	4,099	11,350	15,449	11,601
1974/75	3,848	8,448	12,296	10,180
1975/76	2,116	8,713	10,829	8,594
1976/77	2,235	10,205	12,440	9,614
1977/78	2,826			
	1,000 equivalent cases, 6 No. 10's			
Concentrated pineapple:				
1973/74	915	1,540	2,455	1,653
1974/75	802	899	1,701	1,312
1975/76	389	911	1,300	1,043
1976/77	257	1,157	1,414	980
1977/78	434			

[1] Season beginning July 1 for RSP cherries and June 1 for all other items. [2] California only.

Prepared from reports of National Canners Association, Canners League of California, and Pineapple Growers Association of Hawaii.

Table 21—U.S. wholesale prices of selected dried and frozen fruit items, by months, 1973-77

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
	Dollars per cases											
DRIED FRUIT:												
Prunes												
(24-1 lb. pkg.):												
1973	9.604	9.604	9.604	9.604	9.604	9.604	9.604	9.604	9.604	9.604	9.604	9.604
1974	9.604	9.604	9.604	9.653	9.653	9.653	9.653	9.653	9.653	9.571	9.571	9.571
1975	9.571	9.571	9.571	9.490	9.049	9.049	8.575	8.575	8.575	8.575	8.575	8.673
1976	8.526	8.428	8.526	8.918	8.918	9.065	9.065	9.424	9.424	9.914	9.914	9.914
1977	10.274	10.274	10.274	10.355	10.355	10.355	10.355	10.486	10.486			
Raisins												
(24-15 oz. pkg.):												
1973	9.609	9.609	9.996	10.119	10.119	10.315	10.315	10.315	10.437	11.564	11.618	12.108
1974	12.120	12.157	12.218	12.446	12.446	12.446	12.397	12.287	12.287	11.772	11.772	11.772
1975	11.650	11.650	11.650	11.527	11.282	11.282	11.282	11.282	11.282	11.527	11.650	11.650
1976	11.748	11.748	11.870	11.870	11.870	11.993	11.993	11.993	11.993	15.741	20.580	20.825
1977	20.825	20.825	20.825	20.825	20.825	20.335	19.845	20.090	20.090			
FROZEN FRUIT:												
Strawberries												
(12-10 oz. pkg.):												
1973	3.388	3.388	3.413	3.413	3.413	3.510	3.510	3.651	3.651	3.783	3.783	3.847
1974	3.847	3.888	3.888	3.888	3.888	3.888	4.087	4.091	4.219	4.219	4.219	4.219
1975	4.219	4.219	4.219	4.218	4.218	4.218	4.218	4.218	4.218	4.285	4.285	4.285
1976	4.285	4.285	4.285	4.407	4.407	4.407	4.648	4.648	4.648	4.679	4.679	4.679
1977	4.679	4.730	4.730	4.730	4.730	4.730	4.813	4.936	4.936			
FROZEN JUICE:												
Orange, conc.												
(12-6 oz. cans):												
1973	2.159	2.159	2.159	2.159	2.106	2.159	2.106	2.106	2.106	2.159	2.159	2.159
1974	2.167	2.152	2.152	2.152	2.152	2.152	2.151	2.151	2.170	2.195	2.134	2.154
1975	2.244	2.254	2.254	2.254	2.254	2.254	2.246	2.246	2.246	2.358	2.383	2.383
1976	2.383	2.352	2.352	2.383	2.383	2.383	2.187	2.187	2.187	2.187	2.187	2.089
1977	2.040	2.776	2.752	2.752	2.752	2.910	2.910	3.101	3.223			

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

Table 22—U.S. monthly average price indexes for fruit

Item	1976					1977								
	Annual	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.
	(1967=100)													
Wholesale price index:														
Fresh fruit	160.4	181.9	184.6	154.1	162.3	172.1	174.3	183.2	173.6	187.9	170.3	172.7	184.0	192.1
Citrus fruit	143.0	208.5	164.0	112.4	129.6	122.4	125.6	149.7	143.8	167.3	142.6	184.5	186.3	237.2
Other fruit	167.1	168.3	192.7	172.2	176.1	193.7	195.5	197.2	186.0	196.1	181.8	166.0	181.5	169.9
Dried fruit	234.9	218.9	244.4	309.4	356.7	356.7	356.7	356.7	357.2	357.2	357.2	353.3	353.3	356.9
Canned fruit and juice	174.4	178.5	179.8	179.9	180.0	178.7	184.8	186.1	187.7	188.6	190.7	190.5	191.0	192.8
Canned fruit	168.2	173.1	173.7	174.0	174.3	175.0	175.1	176.2	177.4	178.6	180.9	180.1	178.8	179.9
Canned fruit juice	186.0	189.1	191.5	191.2	191.2	186.9	201.6	203.4	205.5	206.1	207.8	208.5	211.5	214.4
Frozen fruit and juice	156.2	152.3	152.5	152.5	147.4	144.2	186.1	184.7	184.7	184.7	193.6	194.1	205.7	212.6
Consumer price index:														
Fresh fruit	160.8	163.4	166.2	166.9	165.1	164.1	172.3	180.9	185.8	185.8	197.4	197.1	200.2	180.4
Index of fruit prices received by growers[1]	132	130	159	130	121	119	122	131	141	165	156	151	169	176

[1] Index for fresh and processed.

Table 23—U.S. monthly average fruit prices received by growers

Commodity and unit	1976				1977								
	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.
Apples for fresh use (cents/lb.)	13.20	12.60	11.60	11.30	11.10	11.10	12.00	12.10	12.00	12.10	13.40	12.70	13.30
Pears for fresh use ($/ton)	146.00	182.00	172.00	171.00	140.00	121.00	102.00	112.00	117.00	133.00	140.00	116.00	181.00
Peaches for fresh use (cents/lb.) ...	14.00	---	---	---	---	---	---	---	33.30	17.10	15.60	14.40	15.30
Strawberries for fresh use (cts./lb.)	40.30	45.60	52.60	59.30	52.70	48.60	47.90	38.00	33.50	34.60	34.30	41.80	41.30
Oranges for: ($/box)[1]													
Fresh use	3.50	3.59	3.16	2.93	2.55	3.34	3.31	3.03	3.02	3.21	3.68	4.74	4.80
Processing	-.10	-.09	.59	.69	.72	.71	1.22	1.82	2.26	2.49	-.34	-.34	-.34
All	1.89	1.84	1.81	1.21	.91	.97	1.57	2.03	2.40	2.66	2.27	2.92	3.08
Grapefruit for: ($/box)[1]													
Fresh use	3.60	3.10	2.53	2.49	2.01	3.12	2.81	2.18	2.60	3.02	3.49	3.86	3.40
Processing	-.24	-.08	.38	.25	.34	.47	.57	.63	.67	.31	-.48	-.57	-.72
All	.90	2.16	1.51	1.41	1.07	1.58	1.13	1.10	1.28	1.44	1.30	2.12	2.06
Lemons for: ($/box)[1]													
Fresh use	3.95	5.10	3.69	3.44	3.66	3.56	3.41	3.11	3.90	4.40	3.65	5.00	6.37
Processing	-.95	-.97	-.97	-.95	-.95	-.95	-.95	-.95	-.95	-.95	-.95	-.96	-.95
All	2.59	1.76	1.12	.90	1.00	.59	.99	.99	1.89	2.20	1.96	3.61	4.04
Tangerines for: ($/box)[1]													
Fresh use	---	6.40	6.33	4.54	5.16	7.85	6.02	6.31	4.60	6.82	---	---	---
Processing	---	-.80	-1.17	-.60	-.68	-.63	-.63	-.63	-.62	-.64	-.64	---	---
All	---	4.79	3.94	2.89	3.17	3.90	2.54	3.41	1.98	.85	-.64	---	---

[1] Equivalent on-tree returns.

Source: Agricultural Prices, SRS.

Table 24—Fresh fruit: Retail prices, marketing margin, and grower and packer return per pound, sold in New York City, seasonal average, 1974/75-1976/77

Commodity and season	Retail price (cents)	Marketing margin		Grower and packer return[1] (f.o.b. shipping point price)[2]	
		Cents	Percentage of retail price	Cents	Percentage of retail price
Apples, Eastern Delicious:					
1976/77	34.8	15.4	44	19.4	56
1975/76	25.6	10.2	40	15.4	60
1974/75	31.9	13.7	43	18.2	57
Apples, Eastern McIntosh:					
1976/77	37.8	19.2	51	18.6	49
1975/76	31.3	19.7	63	11.6	37
1974/75	33.7	21.3	63	12.4	37
Apples, Western Delicious:					
1976/77	45.0	23.1	51	21.9	49
1975/76	41.5	25.2	61	16.3	39
1974/75	43.0	22.6	53	20.4	47
Grapes, Emperor:					
1976/77	64.1	36.9	58	27.2	42
1975/76	56.8	36.5	64	20.3	36
1974/75	60.0	40.2	67	19.8	33
Grapes, Thompson Seedless:					
1977	77.5	47.9	62	29.6	38
1976	69.1	40.7	59	28.4	41
1975	75.6	45.9	61	29.7	39
Lemons, Western:					
1976/77	44.5	28.7	64	15.8	36
1975/76	44.8	26.4	59	18.4	41
1974/75	40.5	24.1	59	16.4	41
Oranges, California Navel:					
1976/77	28.5	18.1	64	10.4	36
1975/76	24.7	14.8	60	9.9	40
1974/75	30.0	19.8	66	10.2	34
Oranges, California Valencia:					
1976	28.7	18.6	65	10.1	35
1975	28.2	18.6	66	9.6	34
1974	26.7	16.6	62	10.1	38
Oranges, Florida:					
1976/77	20.5	13.6	66	6.9	34
1975/76	19.7	13.4	68	6.3	32
1974/75	17.8	12.0	67	5.8	33

[1] For quantity of product equivalent to retail unit sold to consumer. Because of waste and spoilage during marketing, equivalent quantity exceeds retail unit. [2] Production area and season: Apples, Eastern Delicious-*New York State* (Oct.-May); Apples, Eastern McIntosh-*New York State* (Nov.-May); Apples, Western Delicious-*Washington* (Oct.-June); Grapes, Emperor-California (Oct.-Apr.); Grapes, Thompson Seedless-*California* (Oct.-Nov.); Lemons-*California* (Aug.-July); *California* Navel Oranges (Dec.-May); *California* Valencia Oranges (May-Nov.); *Florida* Oranges (Nov.-May).

Table 25—U.S. exports of selected dried fruits and tree nuts by destination, 1972/73-1976/77 seasons

Item and season[1]	Canada	Europe				Other	Total[3]
		United Kingdom	Original EC[2]	Other	Total[3]		
	Metric tons						
Prunes:							
1972/73	3,801	2,898	12,894	7,741	23,532	4,043	31,377
1973/74	5,066	5,672	21,675	13,689	41,036	7,609	53,711
1974/75	4,752	3,675	17,218	11,004	31,897	6,504	43,154
1975/76	4,140	3,278	27,061	15,072	45,411	9,438	58,989
1976/77	4,193	2,100	18,570	14,013	34,684	8,913	47,789
Raisins:							
1972/73	4,041	1,640	3,333	5,522	10,495	6,670	21,206
1973/74	5,849	6,193	5,614	11,636	23,444	15,912	45,205
1974/75	7,218	6,698	5,701	8,987	21,386	21,606	50,210
1975/76	8,660	7,859	6,206	12,823	26,889	29,328	64,876
1976/77	6,141	2,599	3,417	9,252	15,269	15,045	36,455
Apricots:							
1972/73	130	14	141	256	410	294	834
1973/74	145	---	229	304	533	156	834
1974/75	130	---	57	123	181	222	533
1975/76	239	8	112	102	224	335	798
1976/77	194	---	170	246	418	414	1,026
Shelled almonds:							
1972/73	1,015	1,934	9,884	3,989	15,807	7,996	24,818
1973/74	1,277	3,346	11,436	4,326	19,108	10,519	30,904
1974/75	1,121	3,083	22,522	8,326	33,930	8,526	43,577
1975/76	1,513	3,795	21,280	8,385	33,460	12,215	47,187
1976/77	2,422	4,062	24,577	9,164	37,803	19,856	60,080
Unshelled walnuts:							
1972/73	1,307	227	3,992	2,398	6,617	2,829	10,754
1973/74	1,548	815	9,710	5,158	15,682	2,976	20,206
1974/75	1,446	386	11,459	5,987	17,832	3,465	22,743
1975/76	1,769	977	18,989	13,655	33,621	3,171	38,561
1975/76 thru Aug.	1,195	837	18,357	12,825	32,018	3,093	36,306
1976/77 thru Aug.	1,755	399	13,675	12,793	26,868	2,375	30,998

[1] Season beginning September 1 for prunes and raisins, August 1 for almonds, October 1 for walnuts, and July 1 for apricots. [2] Belgium, Luxembourg, France, West Germany, Italy and Netherlands. [3] Some totals do not add due to rounding.

Source: Foreign Agricultural Service.

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