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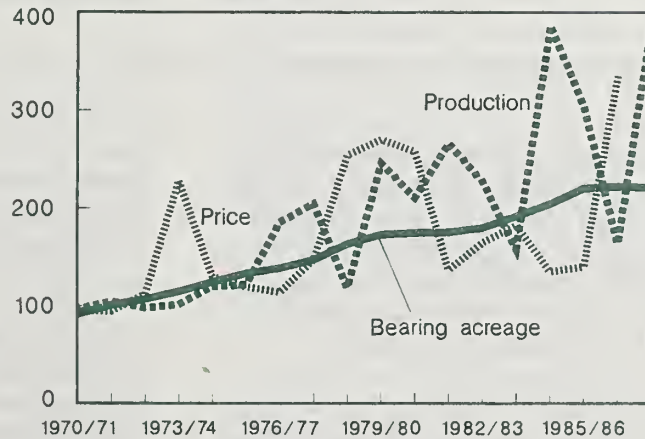
TFS-243
September 1987

Fruit

Situation and Outlook Report

U.S. Almonds: Bearing Acreage, Production, and Price

Percent of 1970/71-1972/73



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SUMMARY

This fall's supplies of *fresh noncitrus fruit* are expected to be substantially larger than last year. The U.S. apple crop forecast, at a record 9.69 billion pounds, is 23 percent more than 1986 production. Total pear production is expected to be 10 percent above last year, with production of fall and winter pears up 8 percent. However, the U.S. grape crop is forecast 2 percent less, with California table grape production down 15 percent.

The 1987/88 citrus crop probably will be larger than 1986/87 as citrus groves in Florida and Texas continue to recover from recent freezes. Most citrus groves in Florida and Texas are in very good or excellent condition. All fruit crops are making very good progress. Even though demand is expected to remain relatively strong, fresh fruit prices are likely to decline below a year ago this fall.

Larger crops of clingstone peaches, Bartlett pears, and apples will result in more canning than last year. But depleted carryin stocks will result in relatively small supplies of several canned fruit items again in 1987/88. Strong demand prospects, high contract prices of raw products, and small supplies are likely to keep canned fruit prices firm. On the other hand, expected lower contract prices for canning apples and larger pack may weaken canned apple product prices in 1987/88.

Supplies of dried fruit should be adequate to meet demand. The larger raisin grape crop is expected to result in higher raisin output this year than last year's 278,900 tons. Thus, even with smaller carryin stocks (excluding the reserve pool diverted by growers), raisin supplies should be adequate. The California prune crop is estimated to be significantly above 1986. Even with carryin stocks considerably below a year ago, the 1987/88 supply will remain above 1986/87. Nevertheless, larger supplies are unlikely to result in an appreciable price drop if demand remains strong.

Supplies of frozen fruit will be larger than a year ago. Larger crops and a need to rebuild smaller stocks of frozen strawberries early this season have resulted in sharply increased deliveries of strawberries to freezers in the Pacific Coast States. Imports of frozen strawberries, mostly from Mexico, have been significantly above a year ago. Consequently, larger supplies of frozen strawberries are likely to weaken prices. The sharply larger tart cherry crop will result in increased supplies of frozen tart cherries. Grower prices are likely to fall below last season even though the industry forecasts that this year's frozen cherry pack probably will not be as large as expected.

Strong demand from processors for rebuilding reduced stocks and for export markets have kept U.S. orange prices strong this season. Because of the higher juice yield, Florida packers have processed 10 percent more frozen concentrated orange juice (FCOJ) in 1986/87 than the previous season. Although total FCOJ imports are running above a year ago, Florida imports so far have been substantially lower than a year ago. Higher prices and increased competition from strong demand for chilled orange juice reprocessed from the imported FCOJ have weakened movement of Florida FCOJ. The increased pack and sluggish movement have been counterbalanced by reduced carryin stocks, leaving stocks as of August 15 almost the same as a year ago. F.o.b. prices have been steady at \$4.46 per dozen 6-ounce cans since the last hike in late March, compared with \$3.84 a year ago. Weak movement is likely to keep prices steady during the balance of the season.

Supplies of almonds and walnuts are expected to be larger than last season. Larger supplies will likely more than offset strong demand, pushing this season's prices received by growers below last season's high.

GENERAL PRICE OUTLOOK

For the first 8 months of 1987, grower prices for fresh and processing fruit averaged 5 percent higher than a year ago. However, the August index of grower prices fell to 147 (1977=100), 12 percent below July and 22 percent lower than a year ago. The decrease from last year was primarily due to lower prices for apples, grapefruit, peaches, pears, and strawberries, although prices were higher for oranges and lemons. The index is expected to decline further this fall, with seasonal increases in supplies of apples, pears, and citrus.

Retail fresh fruit prices have been substantially higher than a year ago. The Bureau of Labor Statistics' (BLS) consumer price index for fresh fruit, at 416.7 (1967-100)

in July, rose 9 percent from the year before even though it fell 5 percent from June. Higher prices have been attributed primarily to increased prices for apples and oranges. However, retail prices of bananas have averaged lower than year-earlier levels. As supplies of apples, pears, and citrus increase seasonally this fall, retail prices are expected to drop further.

Retail prices of processed fruit have steadily increased, led by canned and dried fruit. Retail prices of frozen concentrated orange juice (FCOJ) have also risen from a year ago since May. The July index of processed fruit, reported by the BLS, averaged 5.2 percent above a year ago. Prices of most processed fruits have remained strong. With f.o.b. prices for FCOJ steady, retail prices are not likely to rise appreciably. In view of

Table 1.—Index of annual and quarterly prices received by growers for fresh and processing fruit, 1984-87

Year	Annual	1st	2nd	3rd	4th
1977=100					
1984	202	142	170	255	239
1985	181	180	178	184	180
1986	167	150	159	178	180
1987		168	178	1/ 157	

1/ Two-month average.

SOURCE: Agricultural Prices, NASS, USDA.

Prices Received by Producers, Fruit and All Farm Products

1977 = 100

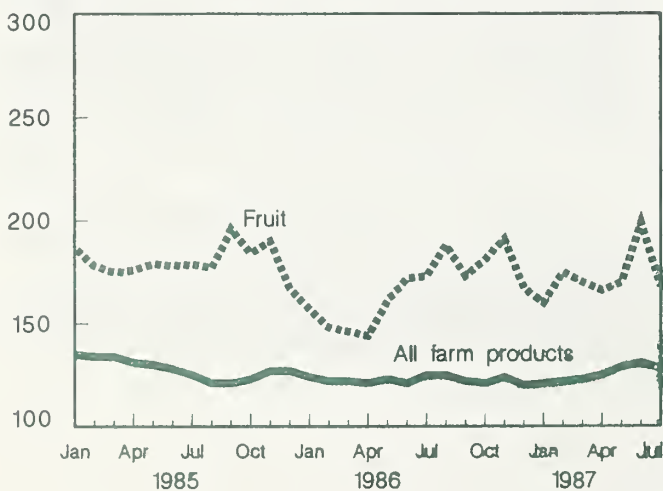


Table 2.—Annual and quarterly consumer price indexes for fresh fruit, 1984-87

Year	Annual	1st	2nd	3rd	4th
1967=100					
1984	329	295	321	355	343
1985	362	356	377	372	344
1986	369	352	375	386	364
1987		400	429	1/ 417	

1/ July's figure only.

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

Fresh Fruit: BLS Consumer Price Index

% of 1967

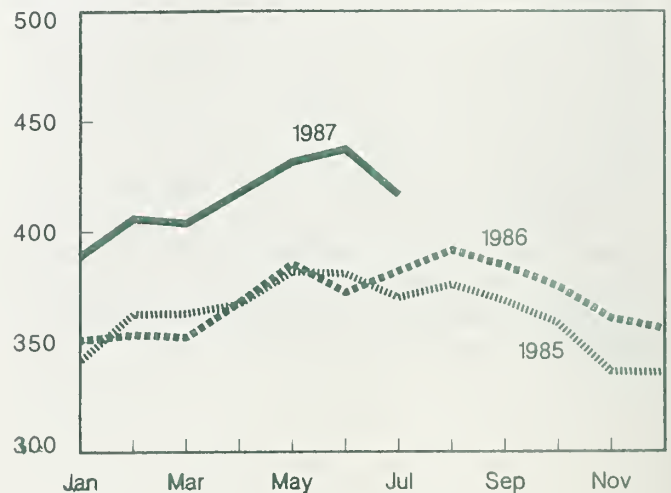


Table 3.—Frozen fruit and berries: Cold storage holdings, July 31, 1985-87

Commodity	1985	1986	1987
1,000 pounds			
Apples	45,807	59,861	48,658
Apricots	11,859	9,651	13,499
Cherries	199,217	204,698	244,782
Grapes	3,190	2,110	1,293
Peaches	20,581	19,232	27,684
Blackberries	12,745	15,690	25,339
Blueberries	23,223	27,743	33,116
Boysenberries	4,477	5,150	6,557
Raspberries, red	39,936	41,561	52,085
Strawberries	257,865	242,981	330,198
Other fruits and berries	88,075	90,924	94,204
Total	706,975	719,601	877,415

SOURCE: Cold Storage, NASS, USDA.

relatively small supplies of canned fruit and higher contract prices for clingstone peaches and Bartlett pears, canned fruit prices are expected to stay firm. Supplies of dried and frozen fruit are likely to be adequate to meet demand. Overall, retail prices of processed fruit are expected to remain slightly higher than a year ago.

NONCITRUS

The August 1 forecast for this year's noncitrus production of all major tree fruits and grapes is 13.5 million tons, 12 percent above last year. Because of larger supplies of summer fruit, f.o.b. prices have averaged well below 1986 levels. With larger supplies of apples and pears, fall supplies of fresh noncitrus are expected to be more than adequate to meet market demand.

Consequently, even with the anticipation of rising demand, grower prices of fresh noncitrus fruit this fall likely will remain below a year ago.

Apples

Record Crop Expected

The August 1 forecast for U.S. 1987 apple production is 9.69 billion pounds, 23 percent more than 1986 and 22 percent above 1985. All regions of the country expect production increases over 1986. Good weather in all

Table 4.—U.S. noncitrus fruit: Total production, 1985, 1986, and indicated 1987

Crop	1985	1986	1987
1,000 short tons			
Apples	3,961	3,946	4,845
Apricots	132	55	116
Cherries, sweet	133	138	190
Cherries, tart	143	112	182
Grapes	5,607	5,226	5,099
Nectarines	210	172	190
Peaches	1,074	1,163	1,243
Pears	747	766	842
Plums and prunes	648	490	806
Total	12,656	12,068	13,513

SOURCE: Crop Production, NASS, USDA.

regions contributed to heavy fruit set and larger than normal fruit size. Additionally, young trees are entering commercial bearing age. In Washington, bearing acreage increased from 112,000 in 1985 to 126,000 in 1986.

The forecast for the Eastern States, 3.37 billion pounds, is up 15 percent from last year. New York, the leading apple producing State in the East, expects to harvest 20 percent more apples. Maturity and size are ahead of normal. In contrast, Pennsylvania, the region's second largest apple producing State, expects a 12-percent smaller crop. Virginia's crop, at 490 million pounds, is up 6 percent, while North Carolina expects a crop of 400 million pounds, up 233 percent from last year's small crop. Early freeze and frost damage were limited this year throughout the region.

The Central States' forecast, 1.69 billion pounds, is up 60 percent from 1986. All States show big gains, but the harvest in Michigan, the region's leading producer, is forecast at 1.15 billion pounds, up 64 percent from a year ago. Good growing conditions and more bearing trees have pushed Michigan's crop to record expectation. Ohio, the second major producer, expects a crop of 155 million pounds, 72 percent above 1986 and 7 percent from 1985. Excellent spring weather helped fruit set. Thinning has been effective and should produce a crop of outstanding size and quality. There was little frost damage in Ohio.

Table 5.--Apples: Regional production, 1985, 1986, and indicated 1987

Area	1985	1986	1987
Billion pounds			
East	3.14	2.94	3.37
Central	1.64	1.06	1.69
West	3.14	3.89	4.63
Total U.S.	7.92	7.89	9.69

SOURCE: Crop Production, NASS, USDA.

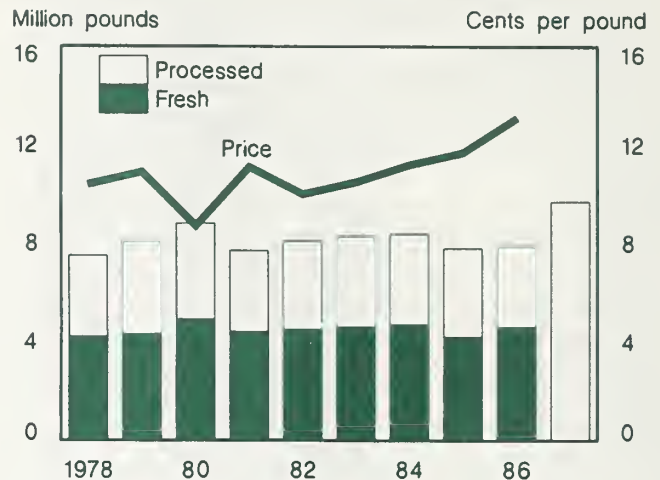
Production in the Western States is forecast at 4.63 billion pounds, up 19 percent from last year. Washington, the Nation's leading apple-producing State, expects a crop of 3.5 billion pounds, up 13 percent from 1986. However, Washington's share of the U.S. apple crop decreased to 36 from 39 percent in 1986. In Washington, the winter was mild, pollination weather was favorable, and the set good. Many young orchards are coming into production. At 650 million pounds, apple production in California, the second largest producer in the West, is 22 percent larger than in 1986. California's pollination weather was excellent and the set heavy. Oregon's crop forecast is 160 million pounds, 52 percent more than last year. Weather conditions in Oregon have been much better than last year. Crop development is ahead of normal, and there is little frost damage. Production in all other Western States also shows strong gains.

Grower Prices Strong

Strong demand improved the 1986 season-average apple price for growers significantly over 1985. Higher prices were indicated for both fresh and processing apples. Estimated grower prices for fresh apples averaged 19.2 cents a pound, up 11 percent from 1985, while those for processing apples averaged \$117 a ton, compared with \$103 in 1985.

With larger stocks and increased supplies of summer fruit, grower prices for fresh apples fell sharply in August. The August price, 15.5 cents a pound, declined 39 percent from July and 48 percent from a year ago.

U.S. Apple Production, Utilization, and Prices



Utilized production. Season-average grower prices. 1987 indicated total production.

More apples will be available for fresh market during 1987/88 because of the substantially increased Washington crop. However, domestic demand for apples is likely to remain strong. Export sales of fresh apples also are likely to stay strong in view of the weak dollar and sharply increased supplies.

Processor demand for this year's apples looks favorable because of strong demand for apple juice. However, negotiated prices for processing apples are likely to be at levels below last year. The Michigan Processing Apple Grower Marketing Committee recommended that the negotiated prices for most processing apples be moderated below last year. For instance, the price for Jonathan apples for 2-3/8 inches and up, is \$8 per cwt, compared with \$8.25 a year ago. Overall, larger supplies will likely more than offset strong demand, pushing this season's apple prices received by growers below a year ago.

Exports Up, Imports Fall

The trade picture for fresh apples has improved substantially from last season. The weak dollar and continued marketing promotion and development have contributed to improved export markets. During 1986/87 (July-June), exports of fresh apples totaled 168,274 metric tons, up 10 percent from the previous year. Exports were reported up to all regions except East Asia and the Pacific, where exports showed a mixed pattern. Exports to Taiwan showed a sharp gain, while those to Hong Kong, Malaysia, and Singapore

Table 6.--Processed apples: Season-average price per ton received by growers, by type of use, principal States, 1984-86

Use and State	1984	1985	1986
	Dollars		
Canning:			
Michigan	138.00	130.00	138.00
New York	132.00	110.00	130.00
Pennsylvania	138.00	135.00	124.00
Virginia	130.00	164.00	1/
Washington	117.00	129.00	126.00
West Virginia	182.00	140.00	144.00
United States	128.00	137.00	137.00
Juice and cider:			
California	109.00	76.00	105.00
Michigan	92.00	72.00	104.00
New York	84.00	66.00	102.00
Pennsylvania	96.00	74.00	90.00
Virginia	88.00	76.00	1/
Washington	70.00	78.00	77.00
United States	88.00	75.00	97.70
Frozen:			
Michigan	166.00	142.00	168.00
New York	126.00	126.00	1/
United States	151.00	139.00	150.00
Dried:			
California	133.00	128.00	140.00
New York	124.00	114.00	1/
United States	123.00	132.00	122.00

1/ Data not available due to disclosure of individual operations.

SOURCE: Noncitrus Fruits and Nuts, NASS, USDA.

decreased sharply. Canada, the leading importer of U.S. fresh apples, recorded a strong increase. Shipments to Western Europe also recorded sharp gains. Moderate increases were indicated for the Mideast and North Africa and for Latin America and the Caribbean.

During 1986/87, U.S. fresh apple imports decreased sharply from 1985/86. There were reduced shipments from France because of plant quarantine restrictions and from South Africa because of the October 1986 trade embargo. Imports from Canada also showed a moderate decline. In contrast, continuing an upward trend, imports from New Zealand were up 10 percent from a year earlier. Imports from Chile rose 41 percent. Consequently, Chile has become the leading U.S. apple imports. If shipments from France are approved, imports could increase slightly in 1987/88.

Grapes

Slightly Smaller Crop Expected

On August 1, the U.S. production forecast for all grapes was 5.1 million tons, 2 percent below last year and 9 percent lower than 1985. The moderately smaller California crop is chiefly responsible, while larger crops are expected in other major States.

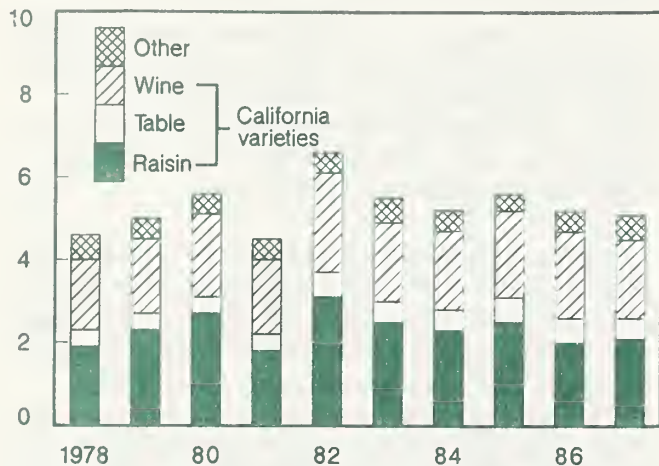
The California all grape forecast is 4.53 million tons, 5 percent below last year and 13 percent lower than 1985 production. Drought and other factors reduced the yield potential by lowering berry growth and cluster size. California is experiencing the driest year since 1978. Many growers' water allocations have been scaled back, and some growers have switched to costly pumping of well water. However, reservoirs were holding at near normal levels going into this growing season.

The California raisin-type grape forecast is set at 2.1 million tons, up 3 percent from 1986, but 16 percent lower than the 1985 crop. Bunch counts are average. Only 15,000 acres of Thompson Seedless variety grapes are enrolled in the 1987 raisin industry diversion program, compared with 50,000 enrolled in 1986. Therefore, harvested acreage will be substantially higher. The forecast for California's wine-type grapes is 1.9 million tons, 10 percent below 1986 and 11 percent less than 1985. Bunch counts are slightly below average, but crop quality is expected to be good. The California table-type grape forecast is 530,000 tons, a 15-percent decline from 1986. Most table variety yields have been light, and some quality problems were reported.

Total grape production in other States is estimated at 596,000 tons, up 25 percent from last year and 42 percent from 1985, primarily because of increased production in Michigan, New York, and Washington. The Michigan grape forecast is 55,000 tons, 72 percent above 1986. Growing conditions have been ideal for fruit set and quality. This year's early maturing crop is expected to have some of the highest sugar content seen in several years. The New York all grape forecast is set at 172,000 tons, an increase of 5 percent from last season. Grapes were growing well, developing 5 to 7 days ahead of normal, and showing good yield potential.

U.S. Grape Production

Million tons



Total production. 1987 Indicated production.

The Washington forecast for all grapes is 235,000 tons, 51 percent above 1986 production. The forecast consists of 195,000 tons of Concord grapes and 40,000 tons of wine varieties. Washington had a mild winter, a frost-free spring, and favorable growing conditions so far. Also, bearing acreage continued to increase in 1986, rising 3 percent from 1985. Production in Ohio and Pennsylvania also showed gains of 19 and 5 percent, respectively, over 1986.

Prices Strengthening

Because of the smaller crop, shipments of fresh table grapes are running well behind last year's pace. However, even with reduced supplies, f.o.b. prices for fresh grapes were weak early in the season primarily because of quality. Prices have strengthened recently. In mid-August, the f.o.b. price for Thompson Seedless grapes was quoted at \$8-\$9 per 23-pound lug in central San Joaquin Valley, compared with \$7-\$8 a year earlier. Fresh market grape supplies will be down this season because of the smaller crop. The use of table grapes for the fresh market is expected to fall from last year. The market for competing uses of multipurpose varieties, particularly Thompson Seedless, likely will be strong because of strong domestic wine shipments, improved demand for raisins, and the smaller crop.

On the other hand, marketing of this season's fresh grapes may be affected by the California table grape industry's proposal to

ask retailers to post signs cautioning shoppers that table grapes may have been treated with potentially hazardous sulfur dioxide. As a result, 40 percent of the bunches in each treated box of California table grapes sold in supermarkets after September 1 will bear tags warning that these grapes have been treated with sulfites. The label will permit grapes to be sold regardless of sulfite residue levels. The proposal is to be reviewed by the Environmental Protection Agency and the Food and Drug Administration.

Because of larger crops, the grape crush in New York, Michigan, and Washington is likely to rise this year. However, a smaller wine grape crop will result in California's crush being moderately less than last season. The expected smaller crush, coupled with fewer stocks and reduced imports, will result in smaller wine supplies. Wine imports are likely to remain sluggish because of higher prices resulting from the weak U.S. dollar. Demand for domestic wine has been strong. According to the Wine Institute, California wine shipments through May this year rose about 6 percent from a year ago. Imports of wine through May recorded an 11-percent decline, with smaller purchases from most major wine-producing countries.

Strong demand has strengthened wine prices reported by the BLS. The BLS July consumer price index for all wines was 249.1 (1967-100), up slightly from a year ago. In view of strong demand for domestic wine and a smaller crop, grower prices for California wine-type grapes are expected to average above last year's \$207 a ton. In turn, wine prices are likely to remain firm.

During 1986/87, domestic shipments of raisins fell slightly from the preceding season in response to higher prices, while exports gained substantially. Larger exports have resulted from the weak dollar and increased export promotion. According to the Raisin Administrative Committee, exports totaled 90,601 tons during 1986/87, up almost 14 percent from a year ago. Sharply larger shipments to Europe were chiefly responsible.

The United Kingdom, our largest European market, purchased 28 percent more raisins than in 1985/86. However, Japan, our leading customer, bought a substantially smaller quantity. Consequently, carryout

inventory of free raisin tonnage at the beginning of 1987/88 was well below a year earlier. With a slightly larger raisin grape crop and increased demand, 1987 raisin output is likely to increase. Currently, trade estimates place raisin production at 300,000 to 320,000 tons, compared with 1986's 278,900 tons. However, even with smaller carryin stocks (excluding the reserve pool diverted by growers), the 1987/88 supply will be adequate.

Export demand for raisins is expected to remain strong as 1987 raisin output by the four major Southern Hemisphere producers fell 28 percent from 1986. Most of the decline among the four countries--Argentina, Australia, Chile, and South Africa--is attributable to Australia where production was down an estimated 36 percent from 1986. After 5 years of sustained high yields, grape vines in Australia apparently have produced a much lower outturn this year, despite generally favorable weather during the growing season. Greek production also is projected to decline. In anticipation of strong demand, raisin prices are likely to advance further. The BLS July producer price index for raisins, at 378.8 (1967-100), was 6 percent above a year earlier.

Nectarines

The 1987 California nectarine harvest is forecast at 190,000 tons, 10 percent more than last year, but 10 percent below the record 1985 crop. The 1987 crop continues to be harvested, with good yields reported. Quality is above average. Many young trees are

Table 7.--Nectarines: Acreage, production, yield per acre, California, 1981-87

Season	Bearing acreage	Production	Yield per acre
	1,000 acres	1,000 short tons	Tons
1981	21.0	182.0	8.67
1982	22.2	178.0	8.02
1983	22.3	185.0	8.30
1984	24.5	183.0	7.47
1985	22.4	210.0	9.38
1986	22.6	172.0	7.61
1987 1/	22.7	190.0	8.37

1/ Preliminary.

SOURCE: California Crop and Livestock Reporting Service.

beginning to bear fruit. Acreage to be harvested, at 22,700, is up slightly from 1986, while yield per acre is up from 7.61 tons in 1986 to 8.37.

Because of late maturity, nectarine shipments through mid-August were running near last year's pace. Nevertheless, larger supplies of summer fruit have resulted in lower f.o.b. prices. In mid-August, the shipping point price was quoted at \$6.00 per two-layer lug (size 70) in the central and south San Joaquin Valley, compared with \$9.00 a year earlier. The season-average price received by growers likely will be below last year's \$440 a ton.

Peaches

Substantially Larger Peach Crop

U.S. peach production is forecast at 2.49 billion pounds in 1987, up 7 percent from last year. The freestone crop, which excludes California clingstone peaches that are mostly canned, is expected to total 1.51 billion pounds, 8 percent more than last year. Production in the nine Southern States is forecast at 502.6 million pounds, 19 percent more than last year. South Carolina, the leading producer, expects to harvest 350 million pounds, up 35 percent. However, peach production in Georgia, the second largest producer, will be 5 percent less. Winter damage has reduced peach production sharply in Arkansas and Texas from a year ago.

The California freestone crop, at 520 million pounds, is up 5 percent from a year ago. Quality is excellent. Production of California clingstone peaches is expected to total 980 million pounds, 5 percent above the 1986 level. Quality is excellent, but individual fruit size is small.

Crop levels are mixed in several States that grow a large quantity of peaches. Michigan and Washington harvests are up 10 and 5 percent, respectively, from last year, while New Jersey will harvest 80 million pounds of peaches, down 24 percent for 1986.

Prices Weak

Shipments of peaches to the fresh market have lagged slightly, mainly because of slower movement from California, while shipments from South Carolina have shown strong gains.

Table 8.--Peaches: Total production and season-average prices received by growers, 1985, 1986, and indicated 1987 production

State	Production 1/			Price per pound	
	1985	1986	1987	1985	1986
	Million pounds			Cents	
Southern States:					
North Carolina	2.0	25.0	30.0	25.0	15.7
South Carolina	230.0	260.0	350.0	20.2	16.0
Georgia	90.0	105.0	100.0	24.6	19.7
Alabama	1.5	6.0	10.0	30.5	27.2
Mississippi	2.5	.3	.5	35.0	33.0
Arkansas	5.0	9.5	1.5	17.2	17.3
Louisiana	6.5	.2	.6	33.0	34.0
Oklahoma	8.0	5.5	4.0	23.3	33.4
Texas	30.0	10.0	6.0	28.0	39.0
Total Southern States	375.5	421.5	502.6		
California:					
Clingstone 2/	985.0	933.0	980.0	11.0	9.8
Freestone	486.0	495.0	520.0	11.4	13.8
Total California	1,471.0	1,428.0	1,500.0		
Other States:					
Massachusetts	2.1	1.9	1.9	41.0	48.0
Connecticut	3.0	2.6	3.0	41.0	48.0
New York	14.5	14.0	12.6	23.2	23.6
New Jersey	95.0	105.0	80.0	28.3	23.6
Pennsylvania	40.0	100.0	100.0	25.1	18.2
Ohio	3/	2.5	9.0	3/	29.0
Indiana	3/	4.0	7.5	3/	33.0
Illinois	3/	21.0	20.0	3/	24.0
Michigan	55.0	50.0	55.0	20.9	17.7
Missouri	3/	12.0	16.0	3/	21.0
Kansas	3.5	5.0	2.0	25.1	37.0
Delaware	1.2	2.7	1.8	26.2	18.5
Maryland	1.0	20.0	18.4	26.2	20.4
Virginia	2.0	28.0	29.0	22.1	21.2
West Virginia	3/	23.0	19.0	3/	14.5
Kentucky	3/	2.0	10.0	3/	20.4
Tennessee	3/	4.0	2.0	3/	24.0
Idaho	11.0	11.0	11.3	19.6	23.6
Colorado	15.0	6.7	19.0	26.0	31.0
Utah	11.0	10.5	11.5	17.0	17.7
Washington	31.0	38.0	40.0	23.8	23.1
Oregon	15.5	13.0	15.0	29.0	27.3
Total Other States	300.8	476.9	484.0		
United States	2,147.3	2,326.4	2,486.6	15.0	14.6

1/ Includes unharvested production and harvest not sold (million pounds): United States, excluding California clingstone, 1985-33.4; 1986-29.0. 2/ California clingstone is over the scale tonnage and includes culls and cannery diversions (million pounds): 1985-67.5; 1986-59.5. 3/ No significant commercial production due to earlier frosts.

SOURCES: Crop Production and Noncitrus Fruit and Nuts, NASS, USDA.

Nevertheless, f.o.b. prices from all sources (South Carolina, Georgia, and California) were below a year ago early in the season. Prices have strengthened somewhat in response to seasonally lower supplies. In mid-August, the f.o.b. price for California peaches in the central and south San Joaquin Valley was

quoted at \$4.00 per two-layer lug pack, compared with \$5-\$6 a year ago. The f.o.b. price for South Carolina peaches at shipping point was quoted at \$3.00 per two-layer lug tray pack, sizes 2-1/4 inches and up, compared with \$6-\$7 last year. As supplies dwindle seasonally, peach prices are likely to rise

further. Nevertheless, grower prices for fresh peaches are expected to average below last year's 19.8 cents a pound.

Strong demand and depleted carryover stocks of canned peaches have strengthened canning peach prices. The California Peach Association and canners have agreed to a 1987 field price of \$193 per ton for clingstone peaches, compared with \$179 in 1986. A field price of \$151 a ton also has been established for 1987 freestone peaches for canning, up 3.4 percent from 1986.

Canned Clingstone Carryin Down Sharply

This year's delivery of clingstone peaches to canners is running moderately behind last year's pace. However, according to the Cling Peach Advisory Board's block-by-block estimates, total 1987 deliveries are expected to reach 492,380 tons, up 9 percent from 1986. Even with the larger pack, total supply of canned peaches for 1987/88 still will fall below last season's 20.1 million cases (24/2 1/2 basis) because of a 41-percent smaller carryin stock. Prices have been steady to firm. With strong movement and higher cost, canned peach prices are expected to remain high during 1987/88.

Canned Peach Exports Strong, Imports Down

Exports of canned peaches during 1986/87 totaled 15,992 metric tons, up 13 percent from the preceding season. The increased exports were attributed mainly to sharply larger quantities shipped to East Asia and the Pacific region, which accounted for 70 percent of total exports. Shipments to Japan increased 36 percent from a year ago. The weak dollar coupled with continued promotion through the Targeted Export Assistance Program (TEA) contributed to increased exports.

Exports to the EC, although relatively small, increased 36 percent over a year ago. In July 1986, the EC cut its subsidy to canned peach processors by 25 percent, and eliminated the processing element of its subsidy program by July 1987. This allows U.S. canned peaches to compete more equitably with EC products. Consequently, prospects to further improve U.S. canned

peach exports are bright during 1987/88. Additionally, the weak dollar, combined with promotion through TEA funds, should further enhance U.S. exports of canned peaches. In contrast, shipments to Canada continued weak, down 26 percent from 1985/86, accounting for only 15 percent of total exports, compared with 23 percent the previous year.

Imports of canned peaches during 1986/87 totaled 17,306 metric tons, down 40 percent. Although reduced imports were recorded from most countries, reduced purchases from Spain were primarily responsible for the overall drop in imports. Imports from Spain totaled only 503 metric tons, compared with 6,924 the previous season. Imports from Greece and Chile were down 15 and 4 percent, respectively.

Pears

Crop Up Substantially

The August 1 forecast for the Nation's pear crop is 842,100 tons, up 10 percent from last year and 13 percent from 1985. Bartlett tonnage in California, Oregon, and Washington is forecast at 520,000, an increase of 12 percent over last year. The California crop is in good condition due to ideal growing weather. Excellent prospects prevail in Washington. Pollination was good, and ideal weather has promoted good sizing. Oregon had excellent growing conditions. Fruit quality and size are good.

Production of pears other than Bartletts in the Pacific Coast States is forecast at 281,000 tons, up 8 percent from last year. Growing conditions have been excellent this year, and size and quality appear very good. This crop is 1 to 2 weeks ahead of normal in Oregon. California production, normally

Table 9.--West Coast Bartlett pear production, 1983-86 and indicated 1987

State	1983	1984	1985	1986	Indicated 1987
Short tons					
Washington	140,800	101,000	111,000	126,000	145,000
Oregon	63,000	44,000	75,000	55,000	75,000
California	259,500	302,000	282,000	285,000	300,000
Total	463,300	434,500	468,000	466,000	520,000

SOURCE: Crop Production, NASS, USDA.

small, is estimated at 11,000 tons, up 22 percent from last year. Crops were up 7 percent for both Oregon and Washington, the principal suppliers of pears for the fresh market in winter and spring. Most of the remaining U.S. crop is centered in Michigan and New York. Production is down 16 percent in New York and has remained unchanged in Michigan.

Prices Down Substantially

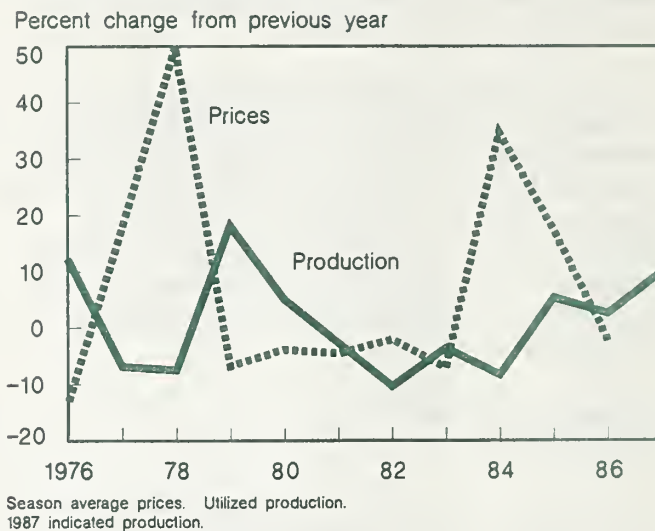
Despite the larger California crop, shipments of fresh Bartletts through mid-August were well behind last year's pace. However, f.o.b. prices for fresh Bartletts at shipping points have been weak. In mid-August, the f.o.b. price was \$8.70-\$9.70 a 36-pound carton for size 110 in Mendocino County, California, compared with \$11.70 a year ago. Bartlett pear prices are likely to strengthen somewhat in late summer when supplies of most summer fruit are depleted. Demand for Bartlett pears from packers will be strong because of depleted carryover stocks and strong demand for canned pears. Because of strong demand, the field price for canning pears has been settled between growers and canners at \$180 a ton, up from last year's \$177. On the other hand, the larger crop of winter pears in the Northwest and increased apple supplies will weaken grower prices during the fall and winter to levels below a year ago.

Sharply Reduced Canned Pear Stocks

Despite higher prices, shipments of canned pears were strong during 1986/87. Total offshore exports of canned pears (excluding Canada) rose 72 percent from 1985/86. Most of the increase was recorded in Western Europe and Asia. The dollar's decline, combined with the infusion of \$5.6 million of TEA funds for canned fruit, contributed primarily to the increase.

Consequently, the smaller supply and increased shipments have resulted in a depleted carryover stock of canned pears at the end of 1986/87. The carryover stock of 1.7 million cases (24/2 1/2 basis) was down 45 percent from last year and off 52 percent from the previous 5-year average. The larger Bartlett pear crop is expected to result in an increased canned pear pack. However, even

U.S. Pears: Changes in Production and Prices



with a larger pack, this season's total supply will still be small because of depleted stock. Prices have been strong and are expected to remain so because of small supplies and higher contract prices for canning pears.

Fresh Pear Exports Strong

Total offshore exports of fresh pears (excluding Canada) during 1986/87 amounted to 17,623 metric tons, up 18 percent from the previous year, the highest level in 5 years. Ample supplies, a pre-Christmas opening date for imports to Sweden, and the decline in U.S. dollar value contributed to the strong performance.

A push for major increases in exports through promotion and market development under the TEA included efforts in Sweden and Saudia Arabia. A sharp increase in shipments to Sweden was recorded, up 32 percent from the previous season. Sweden became the top U.S. customer among offshore countries. Shipments to Latin America were also significantly higher than a year ago, while purchases from the Middle East and North Africa increased only slightly. Export prospects for 1987/88 are favorable because of a good U.S. pear crop and the weak U.S. dollar.

Plums and Prunes

Plum Crop Up Significantly

California plum production is forecast at 210,000 tons, 38 percent more than in 1986.

Quality is above average, but sizes are smaller than normal. California's plum-bearing acreage continues to increase, reaching 37,600 in 1986, up 3 percent from 1985. Due to the larger crop, shipments are running well above last year's pace. Larger shipments and increased supplies of other competing summer fruit have exerted downward pressure on fresh plum prices. In mid-August, the shipping point price for casselman plums was reported at \$4.00 a 28-pound carton in the central and south San Joaquin Valley, compared with \$14.00 a year earlier. Prices are likely to strengthen somewhat as supplies decline seasonally. The season-average price is expected to be well below last year's high of \$657 a ton.

The prune and plum crop in Idaho, Michigan, Oregon, and Washington is expected to total 55,600 tons, 18 percent more than last year. Larger crops are expected for all four States. Idaho expects 6,000 tons, up 20 percent from 1986. Hail and frost damage have been spotty this season, and insect and disease damage has been light. The crop is developing ahead of schedule. Michigan's crop is forecast at 17,000 tons, up 54 percent from last year. Quality is good. The Oregon forecast of 23,000 tons is up 4 percent, while Washington's forecast, at 9.6 tons, is 5 percent larger.

California dried prune production is forecast at 180,000 tons, 82 percent above 1986. The fruit is sizing well considering the heavy crop. The reduced supply and increased shipments have resulted in a carryover stock considerably below a year ago. However, with a larger crop, the total 1987/88 supply will be more than in 1986/87. According to the California Prune Marketing Committee, dried prune shipments during 1986/87 totaled 147,031 tons, up 4.5 percent from 1985/86, with increased exports more than offsetting reduced domestic shipments. Increased exports were attributed primarily to heavy shipments to Europe and Asia. An expanded market development program in Europe and the dollar's declining value have contributed to the increase.

A \$4-million TEA in eight West European countries in fiscal 1986 has spurred European demand for dried prunes. Through June 1987, exports to Western Europe have risen 13 percent from a year ago. Shipments to Asia

have increased 23 percent from a year ago. Japan still remains the leading customer, with a 32-percent larger purchase over a year earlier. However, exports will meet additional competition this season because lower Soviet purchases will force increased quantities of Yugoslav dried prunes into the Western Europe market where they will compete with U.S. prunes. Additionally, the large Yugoslav fresh plum crop anticipated in 1987 will compound this excess supply problem.

The 1987 prune prices have not been established. Despite increased shipments, this year's wholesale prices of dried prunes held steady at last year's levels until July when prices advanced 4 percent from June and a year ago. With larger supplies, dried prune prices are not likely to decline appreciably if demand remains strong. The California Prune Marketing Committee has recommended that 100 percent of the 1987 prune crop be saleable.

CITRUS

With 92 percent of the harvest complete, the July 1 estimate of the 1986/87 citrus crop was 11.8 million tons, 7 percent above 1985/86. Most of the increase is accounted for by a 47-percent jump in the California-Arizona lemon crop, an 8-percent increase in the Florida grapefruit crop and the California-Arizona orange crop, and the continued rebound from the December 1983 freeze that ruined the Texas orange and grapefruit crops. Lemon yields are up in California and Arizona compared to last year's unusually low level. After four significant freezes in Florida over the last 6 years, the Florida grapefruit crop had an excellent 1986/87 season. The weather provided good growing and fruiting conditions. Florida grapefruit production is estimated to be up 6 percent over last season. Although the Florida orange crop is projected to be less than 1 percent above last season, the total citrus crop is still estimated to be 7.9 million tons, about 3 percent larger.

Grower equivalent on-tree prices have been mixed this season compared to last. Orange prices were higher, but lemon prices were sharply lower, especially early in the season. Grapefruit prices started the season above year ago levels, but slipped below these levels in May, June, July, and August.

Oranges

Slightly Larger Crop

The final forecast for the 1986/87 U.S. orange crop was 7.7 million tons or 3 percent above the previous season. Most of the increase was due to a forecasted 12-percent larger California Valencia crop. The California and Florida navel orange harvest is projected to be 3 percent larger than the 1985/86 season and 24 percent larger than the 1984/85 freeze-damaged crop. Although small, Texas orange production was up 182 percent from 1985/86, continuing its recovery from the December 1983 freeze.

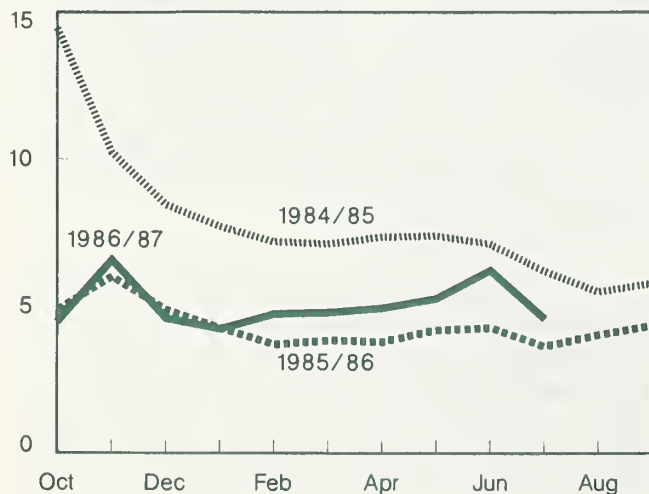
Grower Prices Higher

Despite the larger crop, U.S. orange on-tree returns rebounded from last season's relatively low prices. However, they were still sharply below those received 2 years ago. Strong demand from processors and export markets have kept orange prices strong. However, grower prices have declined this summer primarily because of increased shipments and competition from ample supplies of summer fruit. In August, on-tree returns for Valencia oranges fell to \$4.17 a box from \$4.58 in July, but were still slightly above a year ago. With smaller remaining supplies, on-tree returns for Valencia are likely to remain above a year ago.

Similar to the changes in grower returns, retail prices for fresh oranges have been

All Oranges: U.S. Equivalent On-Tree Returns Received by Growers

Dollars per box



strong. July retail prices averaged 56.4 cents per pound, compared with 46.7 cents a year ago and 57.1 cents 2 years ago. Smaller remaining supplies are likely to keep orange prices above a year ago throughout the early fall.

Larger Share of California Crop Goes to Processing

Total fresh shipments of California Valencia oranges through August 20 were 4 percent lower this year compared to the same period last year. A 14-percent decline in domestic shipments was mostly offset by higher export shipments. The increase in the Valencia crop has gone entirely into processed products. The proportion of total shipments through August 20 going into processing use increased from 19 percent last season to 34 percent this season. The drop in fresh utilization reflects, in part, difficulties of marketing a larger crop of small oranges. Because of stable demand and about the same size orange crop in Florida this year as last, use of Florida oranges for processing was about 93 percent, the same as last season.

Fresh Orange Exports Up, Imports Down

This season's exports of fresh oranges from November 1986 to June 1987 were running 8 percent ahead of the same period last season. Exports to Japan were up 15 percent and accounted for 30 percent of the U.S. total. Exports to East Asia and the Pacific region (including Japan and Hong Kong) accounted for 66 percent of all U.S. exports, almost the same as last year. Exports to the EC-12 and other Western European countries were up sharply, but still represented less than 5 percent of total fresh exports so far this season.

Increased exports can be attributed primarily to abundant supplies of California export-grade oranges and the weak dollar. An increase in the annual import quota, expansion of importers' profit margin due to the dollar's depreciation against the yen, and the smaller Japanese mandarin orange crop also helped U.S. orange exports to Japan. U.S. orange shipments to the EC could benefit from lower duty rates for U.S. citrus negotiated under the U.S.- EC citrus accord.

From November 1986 to June 1987, U.S. imports of fresh oranges were running 28 percent less than for the same period last year. Imports from Spain and Israel were both off sharply, but were up almost 18 percent from Mexico.

Larger FCOJ Pack Rebuilds Stocks

The 1986/87 net production of frozen concentrated orange juice (FCOJ) in Florida totaled 145 million gallons, up 9.6 percent from last season. However, the expanded pack and sluggish movement nearly offset the lower FCOJ carryin stocks and imports to Florida, leaving the total supply available as of August 15 this season almost the same as last season. Total FCOJ movement through August 15 declined from 157.7 million gallons (42 degree brix) last season to 152.6 million this season, reflecting higher prices. The f.o.b. price for FCOJ has been steady at \$4.46 per dozen 6-ounce cans (unadvertised brand, Florida canneries) since the last hike late March. This compares with \$3.84 a year ago. Sluggish movement is likely to keep prices steady during the balance of the season.

Through August 15, foreign FCOJ imports to Florida amounted to 44 million gallons, off 14 percent from a year ago. Almost 19 percent of the total available supply of FCOJ in Florida was imported, compared with 22 percent a year ago. However, total FCOJ imports to the United States for the season through June 1987 were up 9 percent from a year ago. Brazil has accounted for about 88 percent of the total, down slightly from last season. Imports now account for more than 40 percent of total supply of FCOJ.

Average retail FCOJ price was generally lower the first half of 1987 compared to 1986. Prices have strengthened somewhat recently. In July, the U.S. city average retail price for 16 oz. FCOJ was \$1.53 compared to \$1.49 last year and \$1.76 2 years ago.

Brazil Likely To Expand Orange Production

Brazil, already the world's leading orange producer, likely will continue to expand production. According to the 1987 estimate of the State Secretariat of Agriculture, there were 139 million orange trees in Sao Paulo, of

which 23 million were less than 4 years old. The high proportion of young nonbearing trees suggests that orange production is headed up in Brazil in the early 1990's. The number of nonbearing trees increased about 4 million in 1985 and again in 1986. A recent USDA report estimated that when these trees come into production in the early 1990's, Brazilian orange production could reach 300 million boxes, 25 percent higher than the 240 million boxes produced in 1987. 1/

About 90 percent of Brazil's orange crop is processed, mostly into FCOJ. Furthermore, about 98 percent of its FCOJ production is exported. In 1984/85, 65 percent of Brazil's FCOJ exports went to the United States, primarily to compensate for reduced production in Florida following major freezes. As the Florida industry gradually recovers, the United States is accounting for a smaller share of Brazil's exports. By 1986/87, 51 percent of Brazilian FCOJ went to the United States. Through June of this season, FCOJ imports from Brazil were about 7 percent above the same period a year ago.

The emergence of Brazil as an alternative source for FCOJ likely means less volatile U.S. orange prices. U.S. prices would be expected to rise less during periods when U.S. production is adversely affected by freezes than they would if no alternative supply existed.

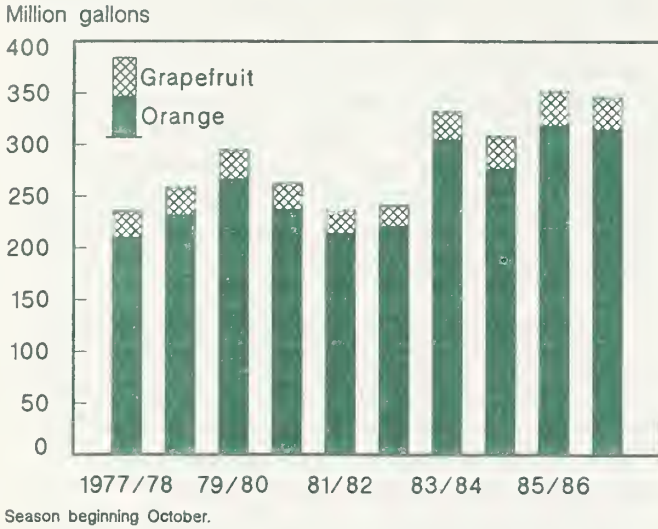
Brazilian FCOJ production is forecast to be 269 million gallons (42 degree brix) in 1987/88, up sharply from last season's 200 million. However, because of the sharply reduced carryin stocks, total supply of FCOJ will be only slightly above a year ago. Brazilian FCOJ demand in the United States is expected to be flat or slightly less in 1987/88, while demand in Europe is likely to expand moderately.

Demand for Chilled Orange Juice Continues Up

Demand for chilled orange juice continues to expand this season. Through August 15, the total domestic movement was 10 percent

1/ "Brazil's Orange Juice Supplies Increase Moderately," Horticultural Products Review, June 1987, Foreign Agricultural Service, USDA.

Florida Packs of Chilled Citrus Juice



ahead of last season and 27 percent ahead of 2 years ago. Florida processors packed 320 million gallons of chilled orange juice (including from fruit, single-strength reprocessed, and concentrates) through August 15, up almost 13 percent from last season. Exports through August 15, though a very small part of total movement, were up 26 percent from a year ago.

Movement of canned orange juice, at 7.1 million cases (24-2's), has rebounded about 6 percent from the sluggish demand recorded last year. But large carryin stocks and pack more than offset increased movement, leaving stocks as of August 15 slightly above last year, but near normal levels.

Stronger movement has advanced canned orange juice prices this year. The price for a dozen 46-ounce cans of single-strength sweetened and unsweetened orange juice was \$11.25 in July compared with \$9.75 last year.

Grapefruit

Remaining Supplies Significantly Larger

The July 1 forecast for the 1986/87 U.S. grapefruit crop is 2.5 million tons, 8 percent above the previous season. Harvest in Florida and the desert area of California is virtually complete, with remaining supplies coming from Southern California. The remaining supplies as of July 1 were up significantly this year, with 7 percent of the U.S. crop

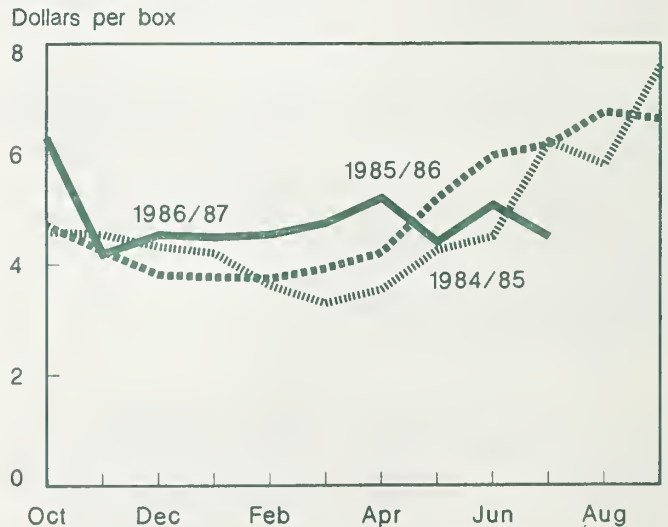
remaining compared to only 3 percent a year ago. The larger grapefruit crop this year is due primarily to an increase of 2.95 million boxes in Florida. Texas grapefruit production remains relatively small, but was more than eight times larger than last season.

In response to strong processor and export demand, Florida grapefruit prices were strong. Florida canneries actively bid for grapefruit during 1986/87 because of strong demand for processed grapefruit products. This season's on-tree grower returns for Florida grapefruit were well above 1986 levels through April 1987. However, the increased supplies of California-Arizona grapefruit have weakened grower prices from May through August to levels below a year ago. In August, on-tree returns for all U.S. grapefruit averaged \$4.14 a box, compared with \$6.76 a year ago. The U.S. average retail price for fresh grapefruit has softened, but is still running at about year-ago levels.

Fresh Exports Up Sharply

Total exports of fresh grapefruit from September through June were up 37 percent this season compared to last. Exports to Japan, the major purchaser of U.S. grapefruit, jumped from 128,477 to 181,959 metric tons or more than 42 percent. So far this season, Japan has accounted for 56 percent of total U.S. grapefruit exports. Exports to the EC-12, primarily France and the Netherlands, are up 30 percent and accounted for 31 percent of total U.S. grapefruit exports. The

All Grapefruit: U.S. Equivalent On-Tree Returns Received by Growers



weaker dollar and increased promotion under USDA's TEA program have contributed to increased exports. Additionally, the Japanese agreement to accept Florida grapefruit either from designated areas with ethylene dibromide (EDB) fumigation or that has been cold treated has encouraged export sales. However, Japan sometimes turned back shipments of some grapefruit because of the Fullers Rose Beetle (FRB). This poses a problem for grapefruit in both Florida and California. The problem is that the FRB lays eggs under the button (remains of the calyx and receptacle) at the stem-end of the fruit. The cold treatment does not kill these eggs.

Processed Utilization Up

Fresh grapefruit utilization in the United States declined about 5 percent reflecting sluggish consumer demand. The lower utilization combined with a larger crop resulted in a 34-percent jump in grapefruit used for processing. The proportion of the total U.S. crop used for processing increased from 44 percent in 1985/86 to 64 percent this season.

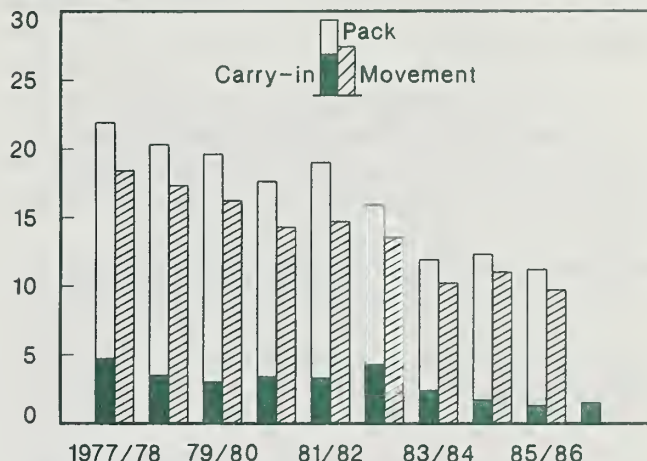
Chilled and FCGJ Packs Up

The utilization of processed Florida grapefruit reflects changes in consumer preferences. Florida canned grapefruit movement continues down while movement of both frozen concentrated grapefruit juice (FCGJ) and chilled grapefruit juice increased slightly through August 15. Frozen concentrated and chilled grapefruit juice both are up 9 percent from last season. Movement of canned grapefruit juice through August 15 was 9 percent below the same period last season and 20 percent below two seasons ago. The industry reduced canned pack accordingly so that August 15 inventories totaled 2 million cases (24-2's), about the same as for the previous 2 years.

Florida packers processed 32.7 million gallons of chilled grapefruit juice, 29.8 million gallons (40 degree brix) of FCGJ, and 8.4 million cases of no. 2 basis cans through August 15 this season. F.o.b. prices at Florida canneries were running ahead of prices for the previous 2 years for all three different juice packs. Despite the larger packs, there has been no buildup of stocks indicating strong demand and firm prices.

Florida Canned Grapefruit Juice: Pack, Movement, and Stocks

Million cases*



* 24/2's. Season beginning October.

Lemons

California-Arizona lemon production rebounded sharply from last season's relatively small crop. The July 1 forecast is 27 million boxes, up 47 percent from last season and 5 percent from 2 years ago.

Movement of California-Arizona lemons into both domestic and export markets during the 1986/87 season was well ahead of last year. Domestic fresh movement was up 7.5 percent, while exports were up almost 15 percent. However, 43 percent of the lemon crop had gone into the domestic and export fresh markets compared to 63 percent for the same period a year ago. Much of the increase in lemon production has been diverted into processing, up 143 percent from a year ago.

The on-tree grower returns for all U.S. lemons have steadily increased during the first half of 1987, but were sharply below year-earlier levels. The deterioration of grower returns reflects the larger crop that more than offset the strength in both domestic and export markets. Also, the lower grower return reflects the relatively small proportion of the crop going to fresh markets, with the balance being diverted into processing where grower returns are negative. However, on-tree returns for all lemons rebounded sharply in August to levels well above a year ago.

U.S. average retail prices for fresh lemons were below year-ago levels through

March this season. Retail prices have since strengthened to levels above a year ago. July prices averaged \$1 a pound, 11 percent higher.

Exports Strong

From August through June, exports of fresh lemons increased almost 18 percent above a year ago, reflecting larger supplies and sharply lower prices especially early in the season. So far this season, Japan has accounted for 86 percent of U.S. fresh lemon exports, about the same as last year.

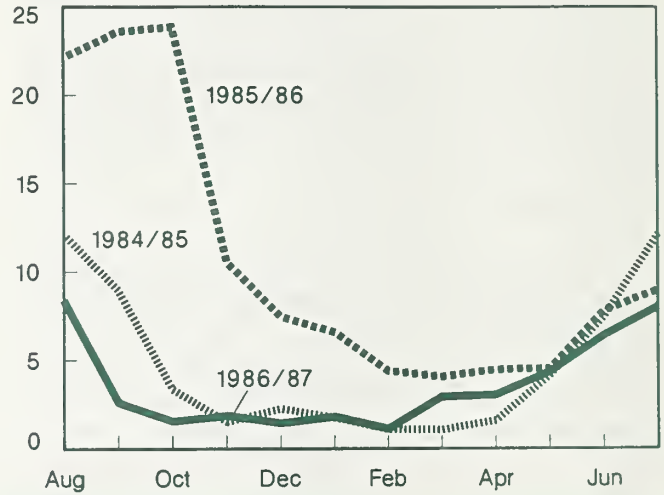
Florida Citrus Production Shifts South

The recent freezes have contributed to a continued southerly shift in the Florida citrus industry (see map). Citrus production in north Florida almost disappeared from 1970 to 1985. Production there dropped 98 percent, mostly reflecting four major freezes over the past 6 years. This is in sharp contrast to the more than sevenfold increase in Collier County, the almost sixfold increase in Glades

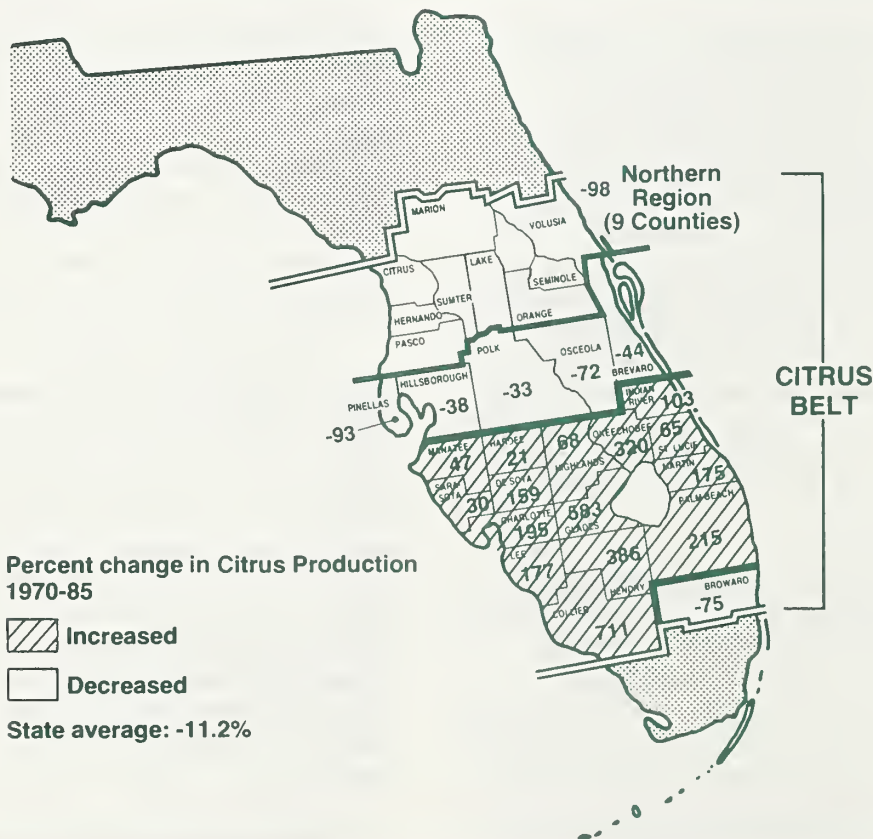
County, and the more than threefold increase in Okeechobee and Hendry Counties. Citrus production likely will rebound somewhat in the north, but the region's share of the Florida crop probably will never equal 1970 levels. This can have significant implications for

All Lemons: U.S. Equivalent On-Tree Returns Received by Growers

Dollars per box



Florida Citrus Belt Shifting South



Florida. As a larger share of citrus trees are in counties further south, they are less likely to be damaged by future frosts.

Citrus production in Broward County, just north of Miami, declined 75 percent from 1970 to 1985, probably due in large part to urbanization. High nonagricultural use value of land around Orlando in the north likely would be a factor in limiting the replanting of orange groves after the freeze.

With the exception of Florida counties with major population centers, land values likely have played only a limited role in the southward shift in orange production. In March 1986, the value of potential citrus land was estimated to be \$2,064 per acre in the southern counties (excluding Palm Beach, Broward, and Dade) and \$2,801 per acre in the counties where orange production declined from 1970 to 1985 (see map). 2/

The lower valued land in southern counties showing growth in orange production reportedly has higher development costs for groves on its flat land than on the sandy soil characteristic of counties where citrus production had declined. This would suggest that differences in land values, including development costs, are not major factors in the location of new citrus groves.

BERRIES

Strawberries

The 1987 strawberry production in the major States is forecast at 1,080 million pounds, up 10 percent from last year with increases in both acreage and yield. Estimates place the spring strawberry crop at 965 million pounds, up 9 percent from 1986, although its share of total production declined to 89 percent from 91 percent last year. California, the leading producer with 88 percent of the spring crop, expects 7 percent more. Larger production is also reported for all other States. Oregon, the second largest producer,

expects a crop of 75 million pounds, 18 percent more than last year. Oregon's strawberry fields survived the winter season in excellent condition. Hot weather in late April and early May put the crop ahead of normal. Later cool and wet weather have been very good for ripening berries. Washington's crop, 21 million pounds, is 50 percent above last year, reflecting a significant increase in yield.

Despite the larger crop, shipments of fresh strawberries through mid-August were running slightly behind last year's pace. The reduced fresh movement was attributed to sharply increased deliveries of strawberries to freezers. Nevertheless, f.o.b. prices for fresh strawberries have been generally well below a year earlier in central California. In mid-August, f.o.b. prices were quoted at \$5-\$6 a 12-pint tray (medium to large size) in central California, compared with \$10-\$11 a year ago. Prices are likely to strengthen as supplies taper off seasonally.

Larger crops and smaller stocks of frozen strawberries early this season have resulted in sharply increased deliveries of strawberries to freezers in the Pacific Coast States. Deliveries of strawberries to freezers in California through mid-August totaled 217 million pounds, up 32 percent from year-earlier levels. Because of strong demand, the field price for processing strawberries in California ranged from a low of 25-32 cents a pound in southern growing areas to 32-35 cents in northern areas, compared with a range of 25 to 28 cents a pound a year ago.

Larger crops in Oregon and Washington also resulted in a significantly larger quantity of strawberries delivered to freezers. However, field prices were lower in the northwest than a year ago. Field prices ranged from 28 to 35 cents a pound near the end of the season, depending on the variety, compared with 35 to 47 cents a year earlier. The overall pack of frozen strawberries on the West Coast is expected to exceed year-earlier levels by a wide margin.

Imports of frozen strawberries from Mexico totaled 27,732 metric tons through June 1987, up 103 percent from a year ago, reflecting increased available supplies. Mexican production of frozen strawberries in the 1986/87 marketing year

2/ Atkinson, J.H., John F. Reynolds, and John R. Gordon. *1986 Florida Farm Land Values Survey Highlight*, Florida Food and Resource Economics, No. 71., Institute of Food and Agricultural Sciences, University of Florida. July-August 1986.

Table 10.--Strawberry deliveries for freezing, 1986-87

State	1986	1987
	Million pounds	
California 1/	166.0	217.1
Oregon 2/	58.9	78.1
Washington 2/	8.6	12.7
Total	233.5	307.9

1/ Through August 15. 2/ For the season.

SOURCE: Food Institute Report.

(October-September) is forecast at 39,753 tons, up 42 percent from last season. So far about 70 percent of Mexico's frozen pack is for export markets, primarily to the United States. Significantly increased domestic pack and imports have resulted in frozen strawberry stocks well above a year ago. However, even with higher prices of the raw product in California, larger stocks and increased supplies of tart cherries are likely to weaken frozen strawberry prices.

TREE NUTS

Almonds

Record Crop

The final forecast for the 1987 California almond crop is a record high 600 million pounds, shelled basis, 140 percent above last year's small crop of 250 million pounds. This year's harvest is expected to be 2 percent above the previous record high of 590 million pounds set in 1984. The 1987 forecast is based on 410,000 bearing acres, down slightly from 1986.

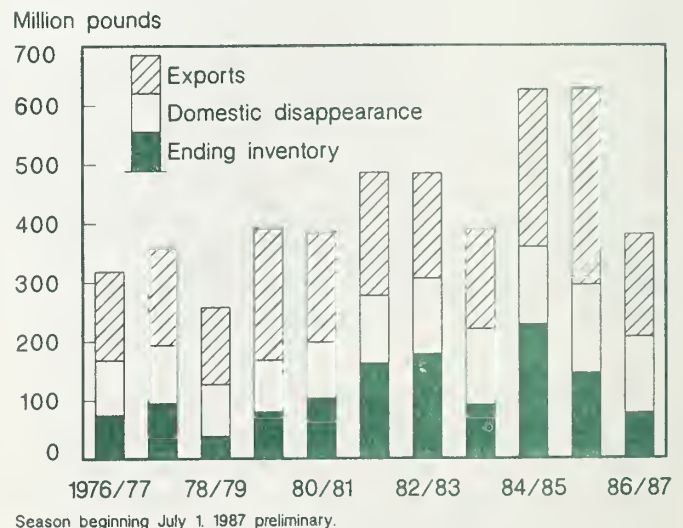
Almonds were developing well under favorable growing conditions. Nut set is heavy, particularly in the California varieties, with some droppage reported. Nonpareil set is described as very good though somewhat less than the California varieties. Trees appear to be rebounding well from last year's low production. The condition and quality of the crop are very good. Maturity in several areas is ahead of normal. Nut size seems to be normal for a high production year. Yield per

acre is estimated at 1,366 pounds (shelled basis), compared with only 601 pounds for the 1986 crop.

Because of higher prices and tight supplies, almond shipments in 1986/87 were well below the previous year. According to the Almond Board of California, total exports during 1986/87 amounted to 174 million pounds, down 48 percent. The decrease was shared by all major importing countries. West Germany, the leading importer of U.S. almonds, showed a decrease of 53 percent from a year ago. Purchases of almonds in Eastern Europe totaled only 8 million, compared with 73 million in 1985/86, mostly from the Soviet Union. Purchases by Japan, at 39 million pounds, were off slightly. But Japan still replaced the Soviet Union as the second largest customer. Export prospects for 1987/88 are likely to improve in light of lower prices and increased supplies.

Domestic almond shipments totaled 130 million pounds during 1986/87, down 14 percent from the previous season. Despite reduced shipments, 1986/87 carryover stocks were well below last season. However, the larger crop is likely to result in larger supplies in 1987/88. Opening f.o.b. prices for the 1987 almond crop are reported to be sharply below last year. In 1986, the U.S. average grower price was a record \$1.92 a pound, compared \$0.80 in 1985.

U.S. Almond Supply and Utilization



Walnuts

Heavy Crop

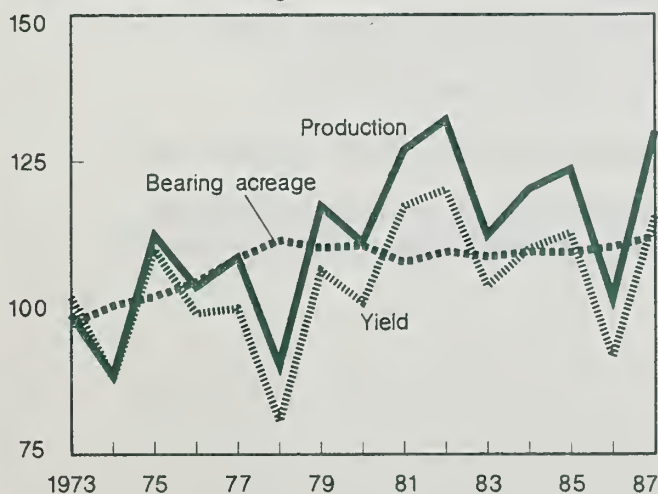
The 1987 California walnut crop forecast, at 230,000 tons, is 28 percent more than last year's production and 5 percent above 1985. The crop is in good condition. Trees are very heavy with nuts. Sizes are varying by area, and quality appears to be excellent. Harvest may be slightly ahead of schedule.

According to the Walnut Marketing Board, 1986/87 shipments of in-shell walnuts totaled 131,776 million pounds, up 4 percent from last year due entirely to 15 percent larger exports. Domestic shipments showed a sharp decline. Consequently, exports accounted for 71 percent of total shipments, compared with 64 percent a year ago.

Most of the increase in exports resulted from significantly larger purchases by Western Europe, particularly West Germany, Spain, and the Netherlands. The increase was primarily attributed to the weak dollar and the European Community's rollback of its counter retaliatory import duty on U.S. in-shell walnuts to 8 percent from 30 percent. Shipments to the East Asia and Pacific region showed strong gains, most of which went to Japan. Japan opened its market to U.S. in-shell walnut exports late in fiscal 1986. The increased promotional activities through the TFA fund also have improved exports to Europe and the Far East.

California Walnuts: Acreage, Production, and Yield Per Acre

Percent of 1973-75 average



Shipments of shelled walnuts dropped moderately as decreased domestic shipments more than offset increased exports. Consequently, the share of the domestic market fell from 90 percent in 1985/86 to 88 percent in 1986/87. Higher prices have contributed to lower domestic shipments. Heavy shipments to Japan accounted for increased exports. Despite sharply decreased purchases from Australia, exports to the Pacific Rim rose 13 percent from a year ago. With the weak dollar and larger supplies, prospects for exports are favorable during the upcoming season.

Prices for the 1987 crop have not been established. The larger supplies likely will result in moderately lower prices even with strong demand prospects. In 1986, the U.S. average grower price for walnuts was \$1,080 a ton, compared with \$798 a year earlier.

Filberts

Third Largest Production Expected

Oregon and Washington filbert growers are expecting to harvest an 18,500-ton crop (in-shell basis), the third largest crop on record, up 23 percent from last year's crop of 15,100 tons, but 25 percent below the record high 1985 crop. Oregon growers will harvest 18,200 tons, up 22 percent from 1986, while the Washington crop, at 300 tons, is 50 percent more than last year.

Weather during the season has promoted earlier-than-normal development of nuts, which apparently caused an early blank drop. Average nut size and weight appear larger than normal and comparable with 1986. Nut set was heavier this year than in 1986, and the number of good nuts per cluster is also higher. Brown stain has been more common this year than last, but still thought to be of minor consequence. The number of bearing trees continues to increase but at a lesser rate than in 1986. The bearing acreage in Oregon continued to rise, from 22,900 in 1985 to 24,500 in 1986, while Washington bearing acreage remained unchanged at 400.

Grower prices for the 1987 crop have not been established. However, the larger crop combined with increased production for almonds and walnuts is likely to weaken filbert prices. In 1986, the U.S. average grower price was \$726 a ton, up 7 percent from 1985.

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Table 11.--Tree nuts: Production, 1985, 1986, and indicated 1987

Crop and State	1985	1986	1987
	1,000 lbs. (kernel weight)		
Almonds:			
California	465,000	250,000	600,000
	Short tons (in-shell)		
Walnuts, English:			
California	219,000	180,000	230,000
Pecans:			
United States	122,200	136,350	N.A.
Filberts:			
United States	24,600	15,100	18,500

N.A.= not available.

SOURCE: Crop Production, NASS, USDA.

Table 12.--Tree nuts in cold storage, June 30, 1985-87

Kinds	1985	1986	1987
	Million pounds		
Almonds:			
In-shell	5.9	5.1	0.4
Nutmeats	145.8	135.0	129.9
English walnuts:			
In-shell	19.0	29.1	.6
Nutmeats	19.7	20.0	32.3
Filberts:			
In-shell	.4	.7	.4
Nutmeats	1.7	3.2	1.6
Pecans:			
In-shell	45.8	52.6	47.0
Nutmeats	28.8	35.8	41.8
Other tree nuts:			
In-shell	2.0	2.4	1.8
Nutmeats	10.4	10.7	17.4
Total:			
In-shell	73.1	89.9	50.2
Nutmeats	206.4	204.7	223.0

SOURCE: Cold Storage, NASS, USDA.

Table 13.--Apples, commercial crop 1/: Total production and season-average prices received by growers, 1985, 1986, and indicated 1987 production

State and area	Production 2/			Price per pound	
	1985	1986	1987	1985	1986
	Million pounds			Cents	
Eastern States:					
Maine	85.0	88.0	79.0	16.3	19.2
New Hampshire	56.0	50.0	51.0	18.6	20.0
Vermont	49.0	49.0	45.0	16.5	17.7
Massachusetts	89.0	95.0	97.0	18.3	19.6
Rhode Island	4.0	5.5	5.5	21.8	22.3
Connecticut	42.0	47.0	44.0	16.6	19.3
New York	1,090.0	900.0	1,080.0	7.0	10.1
New Jersey	105.0	100.0	100.0	11.8	12.4
Pennsylvania	585.0	620.0	545.0	9.4	8.3
Delaware	19.0	27.0	30.0	8.7	9.1
Maryland	80.0	87.0	80.0	10.2	11.3
Virginia	395.0	460.0	490.0	9.8	9.7
West Virginia	230.0	230.0	230.0	9.8	10.6
North Carolina	275.0	120.0	400.0	7.4	8.5
South Carolina	16.0	30.0	45.0	11.0	13.5
Georgia	20.0	30.0	50.0	11.2	16.0
Total	3,140.0	2,938.5	3,371.5		
Central States:					
Ohio	145.0	90.0	155.0	14.4	17.8
Indiana	75.0	37.0	80.0	13.1	18.6
Illinois	106.0	90.0	101.0	12.2	16.0
Michigan	1,100.0	700.0	1,150.0	7.4	9.3
Wisconsin	60.0	56.0	60.0	14.0	17.1
Minnesota	23.0	19.0	26.0	22.0	30.5
Iowa	13.5	5.5	10.0	15.4	26.8
Missouri	62.0	37.0	53.0	16.2	21.2
Kansas	15.0	3.0	12.0	11.6	23.9
Kentucky	17.0	4.0	20.0	14.1	20.8
Tennessee	11.0	9.0	13.0	13.6	18.5
Arkansas	16.0	10.0	12.0	11.6	13.3
Total	1,643.5	1,060.5	1,692.0		
Western States:					
Idaho	131.0	94.0	135.0	19.6	22.2
Colorado	110.0	18.0	110.0	9.5	9.7
New Mexico	10.0	6.0	10.0	12.8	19.0
Utah	57.0	34.0	62.0	12.1	13.8
Washington	2,050.0	3,100.0	3,500.0	17.0	15.8
Oregon	160.0	105.0	160.0	12.6	10.5
California	620.0	535.0	650.0	9.4	17.3
Total	3,138.0	3,892.0	4,627.0		
United States	7,921.5	7,891.0	9,690.5	11.7	13.6

1/ In orchards of 100 or more bearing trees. 2/ Includes unharvested production and harvested not sold (million pounds): United States: 1985-87.7; 1986-25.7.

SOURCES: Production, Crop Production and Prices, Noncitrus Fruits and Nuts, NASS, USDA.

Table 14.--Grapes: Total production and season-average prices received by growers in principal States, 1985, 1986, and indicated 1987 production

State	Production 1/			Price per pound 2/	
	1985	1986	1987	1985	1986
	Short tons			Cents	
New York	144,000	164,000	172,000	147.00	201.00
Pennsylvania	50,000	60,000	63,000	148.00	180.00
Ohio	7,000	8,000	9,500	135.00	220.00
Michigan	51,000	32,000	55,000	215.00	255.00
Missouri	900	2,900	2,600	362.00	310.00
North Carolina	1,500	1,500	2,500	316.00	385.00
Georgia	2,100	2,000	2,700	494.00	792.00
South Carolina	600	500	700	372.00	352.00
Arkansas	8,000	6,000	5,000	129.00	207.00
Arizona	18,500	23,000	21,000	968.00	1,090.00
Washington	116,100	156,000	235,000	178.00	238.00
California:					
Wine	2,140,000	2,105,000	1,900,000	184.00	207.00
Table	580,000	620,000	530,000	230.00	307.00
Raisin 3/	2,487,000	2,045,000	2,100,000	141.00	207.00
All	5,207,000	4,770,000	4,530,000	168.00	220.00
United States	5,606,700	5,225,900	5,099,000	171.00	224.00

1/ Includes unharvested production and harvested not sold (tons): United States 1985-100; 1986-600.
2/ Price derived from unrounded data for California all varieties and raisin varieties. 3/ Fresh equivalent of dried and not dried.

SOURCES: Production, Crop Production and Prices, Noncitrus Fruits and Nuts, NASS, USDA.

Table 15.--Wine: Inventories in California, other States, and United States

Area and type of wine	as of March 31		
	1987	1986	1985
	1,000 gallons		
California:			
Table	433,393	457,170	460,596
Dessert	33,924	38,580	39,092
Other	26,719	26,566	23,470
Total	494,036	522,316	523,158
Other States:			
Table	35,922	31,741	39,068
Dessert	6,692	8,267	8,487
Other	5,620	5,816	4,664
Total	48,234	45,824	52,219
United States:			
Table	469,315	488,910	499,664
Dessert	40,616	46,847	47,578
Other	32,338	32,383	28,135
Total	542,269	568,140	575,377

SOURCE: Wine Institute's Economic Research Department from reports of the Bureau of Alcohol, Tobacco, and Firearms.

Table 16.--Wine entering U.S. distribution channels by origin and type 1/

Origin and type of wine	January-March			Calendar year		
	1987 2/	1986	1985	1986 2/	1985	1984
	1,000 gallons					
U.S. produced: 3/						
Table	25,686	23,722	24,122	267,028	265,980	282,602
Dessert	3,094	2,767	2,216	31,733	30,778	34,131
Other	17,288	11,305	8,191	179,130	146,830	95,366
Total	46,068	37,794	34,529	477,891	443,588	412,099
Imported: 4/						
Table	5,613	7,378	8,621	83,539	111,991	118,722
Dessert	357	235	237	3,250	3,509	3,607
Other	2,779	1,427	1,387	21,910	21,204	20,082
Total	8,749	9,040	10,245	108,699	136,704	142,411
All wine:						
Table	31,299	31,100	32,743	350,567	377,971	401,324
Dessert	3,451	3,002	2,453	34,983	34,287	37,738
Other	20,067	12,731	9,578	201,039	168,034	115,448
Total	54,817	46,833	44,774	586,589	580,292	554,510

1/ Due to rounding, totals may not equal sum of components. 2/ Preliminary. 3/ Includes taxable withdrawals only. 4/ Imports for consumption. 5/ Appears to be overstated. Wine Institute has requested that BATF verify the accuracy of figures reported for this category.

SOURCE: Wine Institute's Economic Research Department from reports of the Bureau of Alcohol, Tobacco, and Firearms.

Table 17.--Pears: Total production and season-average prices received by growers by States and Pacific Coast, variety comparison, 1985, 1986, and indicated 1987 production

State and area	Production 1/			Price per ton	
	1985	1986	1987	1985	1986
	Short tons			Dollars	
Connecticut	1,550	1,600	1,500	475.00	485.00
New York	16,000	19,000	16,000	242.00	210.00
Pennsylvania	2,300	3,000	3,000	319.00	317.00
Michigan	8,000	11,000	11,000	242.00	233.00
Colorado	6,000	1,750	6,000	219.00	280.00
Utah	2,500	2,200	3,600	294.00	345.00
Washington	225,000	266,000	295,000	307.00	274.00
Oregon	193,000	167,000	195,000	274.00	304.00
California	292,500	294,000	311,000	238.00	232.00
United States	746,850	765,550	842,100	269.00	263.00
Pacific Coast:					
Washington:					
Bartlett	111,000	126,000	145,000	248.00	225.00
Other	114,000	140,000	150,000	365.00	317.00
Total	225,000	266,000	295,000	307.00	274.00
Oregon:					
Bartlett	75,000	55,000	75,000	230.00	243.00
Other	118,000	112,000	120,000	302.00	331.00
Total	193,000	167,000	195,000	274.00	304.00
California:					
Bartlett	282,000	285,000	300,000	233.00	223.00
Other	10,500	9,000	11,000	373.00	522.00
Total	292,500	294,000	311,000	238.00	232.00
3 States:					
Bartlett	468,000	466,000	520,000	236.00	226.00
Other	242,500	261,000	281,000	335.00	330.00
Total	710,500	727,000	801,000		

1/ Includes unharvested production and harvested not sold (tons): United States 1985-150. 1986-6,000.
2/ All prices.

SOURCES: Production, Crop Production, and Prices, Noncitrus Fruits and Nuts, NASS, USDA.

Table 18.--Plums and prunes: Production and season-average prices received by growers in principal States, 1985, 1986, and indicated 1987 production

State and area	Production			Price per ton 1/	
	1985 2/	1986 2/	1987	1985	1986
	Short tons			Dollars	
Prunes and plums: 3/					
Michigan	11,000	11,000	17,000	299.00	243.00
Idaho	4,500	5,000	6,000	418.00	477.00
Washington	10,200	9,100	9,600	220.00	366.00
Oregon	26,000	22,000	23,000	163.00	155.00
Total 4 States	51,700	47,100	55,600	230.00	258.00
Dried prunes:					
California	141,000	99,000	4/ 180,000	680.00	792.00
Plums:					
California	166,500	152,000	210,000	514.00	657.00
United States (fresh basis)	648,300	490,200	805,600		

1/ All prices. 2/ Includes unharvested production and harvested not sold (tons): United States 1985-3,600; 1986-3,500. 3/ Mostly prunes, however estimates include small quantities of plums in all States. 4/ Dry-fresh ratio is 3 to 1.

SOURCES: Production, Crop Production and Prices, Noncitrus Fruits and Nuts, NASS, USDA.

Table 19.--Strawberries: Acreage, yield per acre, and production for major States, 1985, 1986, and indicated 1987 1/

Crop and State	Acreage			Yield per acre			Production		
	1985	1986	1987	1985	1986	1987	1985	1986	1987
	Acres			Cwt			1,000 cwt		
Early:									
Florida	5,300	4,900	4,900	200	185	235	1,060	907	1,152
Late:									
California	14,600	15,600	16,100	530	505	525	7,738	7,878	8,453
Louisiana	550	550	600	55	62	72	30	34	43
Michigan	2,500	2,400	2,300	65	60	64	163	144	147
New Jersey	1,100	900	800	55	42	53	61	38	42
Oregon	6,800	7,300	7,500	74	87	100	503	635	750
Washington	3,000	2,800	2,800	71	50	75	213	140	210
Group total	28,550	29,550	30,100	305	300	320	8,708	8,869	9,645
Major State total	33,850	34,450	35,000	289	284	308	9,768	9,776	10,797

1/ Includes fresh market and processing.

SOURCE: Vegetables, NASS, USDA.

Table 20.--Canned nonclitrus fruit: Cannery stocks, packs, supplies, and shipments, 1984/85-1986/87

Item and season 1/	Carryin	Pack	Total supply	Season shipments	June 1 stocks
1,000 equivalent cases 24 No. 2-1/2's					
Total:					
1984/85	5,037	39,382	44,419	35,710	8,709
1985/86	8,709	39,264	47,973	34,904	13,069
1986/87	13,069	33,000	46,069	38,060	8,009
Apricots 2/:					
1984/85	123	1,861	1,984	1,440	544
1985/86	544	1,532	2,076	1,712	364
1986/87	364	505	869	831	38
Fruit cocktail 2/:					
1984/85	1,899	8,671	10,570	8,912	1,658
1985/86	1,658	10,058	11,716	8,743	2,973
1986/87	2,973	8,976	11,949	9,679	2,270
Fruits for salad & mixed 2/:					
1984/85	312	2,506	2,818	2,147	671
1985/86	671	2,509	3,180	2,114	1,066
1986/87	1,066	1,845	2,911	2,210	701
Peaches, clingstone 2/:					
1984/85	1,140	18,687	19,827	15,636	4,191
1985/86	4,191	17,352	21,543	15,895	5,648
1986/87	5,648	14,465	20,113	16,779	3,334
Pears:					
1984/85	1,563	7,657	9,220	7,575	1,645
1985/86	1,645	7,813	9,458	6,440	3,018
1986/87	3,018	7,209	10,227	8,561	1,666

1/Season begins June 1. 2/ California only.

SOURCES: California League of Food Processors and Northwest Food Processors Association.

Table 21.--Canned cherries and purple plums: Cannery stocks, packs, supplies, and shipments, 1984/85-1986/87

Item and season 1/	Carryin	Pack	Total supply	Shipments to April 1	Stocks from April 1	Shipments from April 1	Total season shipments
1,000 equivalent cases 24 No. 2-1/2's							
Total:							
1984/85	302	1,323	1,625	1,033	592	104	1,217
1985/86	408	1,437	1,845	1,085	760	266	1,342
1986/87	502	1,212	1,714	1,058	656		
Cherries, RSP:							
1984/85	7	389	396	259	137	44	303
1985/86	93	390	483	343	139	78	421
1986/87	61	253	314	234	80		
Cherries, sweet:							
1984/85	200	357	557	359	190	67	426
1985/86	131	405	536	311	225	74	376
1986/87	160	327	487	327	160		
Purple plums, U.S.:							
1984/85	95	577	672	415	257	73	488
1985/86	184	642	826	431	395	114	545
1986/87	281	632	913	497	416		

1/ Season beginning July 1 for RSP cherries and June 1 for all other items.

SOURCE: National Food Processors Association.

Table 22.—Canned fruit: Commercial pack of principal items by size of container, United States, 1984/85–1986/87
(basis equivalent cases of 24 No. 2-1/2 cans)

Item and season 1/	Retail size 2/		Institutional size No. 10		Total pack	Item and season 1/	Retail size 2/		Institutional size No. 10		Total pack
	Quantity	Percent of pack	Quantity	Percent of pack			Quantity	Percent of pack	Quantity	Percent of pack	
	1,000 cases	Percent	1,000 cases	Percent	1,000 cases		1,000 cases	Percent	1,000 cases	Percent	1,000 cases
Apricots:											
1984/85	1,151	61.8	710	38.2	1,861	Fruit for salad and mixed 3/:	1,549	61.8	957	38.2	2,506
1985/86	742	48.4	790	51.6	1,532	1984/85	1,456	58.0	1,053	42.0	2,509
1986/87	281	55.6	224	44.4	505	1985/86	963	52.2	882	47.8	1,845
Cherries, RSP:						Peaches, clingstone 3/:					
1984/85	230	59.1	159	40.9	389	1984/85	12,125	64.9	6,562	35.1	18,687
1985/86	249	63.8	141	36.2	390	1985/86	11,096	63.9	6,256	36.1	17,352
1986/87	169	66.8	84	33.2	253	1986/87	9,276	64.1	5,189	35.9	14,465
Cherries, sweet:						Pears:					
1984/85	233	65.3	124	34.7	357	1984/85	4,531	59.2	3,126	40.8	7,657
1985/86	227	56.0	178	44.0	405	1985/86	4,485	57.4	3,328	42.6	7,813
1986/87	179	54.7	148	45.3	327	1986/87	4,142	57.5	3,067	42.5	7,209
Fruit cocktail 3/:						Purple plums:					
1984/85	6,476	74.7	2,195	25.3	8,671	1984/85	266	46.1	311	53.9	577
1985/86	6,850	68.1	3,208	31.9	10,058	1985/86	250	38.9	392	61.1	642
1986/87	6,416	71.5	2,560	28.5	8,976	1986/87	281	44.5	351	55.5	632

1/ Season beginning July 1 for RSP cherries and June 1 for all other items. 2/ May include some institutional sizes reported as miscellaneous. 3/ California only.

SOURCES: National Food Processors Association and California League of Food Processors.

Table 23.--Frozen fruit: Packers' carryin, pack, imports, supplies, apparent disappearance, and stocks of selected items, United States, 1984/85-1986/87

Item and season 1/	Carryin	Pack	Imports	Total supply	Disappearance to Mar. 31	Stocks Mar. 31	Total season disappearance
Million pounds							
Total:							
1984/85	237.4	504.3	78.6	820.3	516.1	304.2	608.5
1985/86	211.8	491.6	78.3	781.7	490.1	291.6	564.6
1986/87	217.1	578.1	107.9	903.1	630.5	272.6	
Apples:							
1984/85	31.2	78.0	--	109.2	45.6	63.6	77.2
1985/86	32.0	85.5	--	117.5	43.0	74.5	73.1
1986/87	44.4	111.1	--	155.5	81.4	74.1	
Apricots:							
1984/85	3.8	16.7	--	20.5	14.1	6.4	15.8
1985/86	4.7	11.8	--	16.5	12.0	4.5	12.5
1986/87	4.0	14.3	--	18.3	15.8	2.5	
Cherries, sweet:							
1984/85	6.1	13.3	--	19.4	8.5	10.9	12.8
1985/86	6.6	10.3	--	16.9	5.8	11.1	9.8
1986/87	7.1	14.4	--	21.5	13.2	8.3	
Peaches:							
1984/85	13.7	75.9	--	89.6	50.0	39.6	71.0
1985/86	18.6	70.3	--	88.9	63.4	25.5	79.6
1986/87	9.3	89.1	--	98.4	74.1	24.3	
Strawberries:							
1984/85	133.2	231.4	61.4	426.0	306.5	119.5	313.6
1985/86	112.4	229.1	53.6	395.1	284.9	110.2	284.9
1986/87	110.2	237.6	81.7	429.5	329.0	100.5	
Blackberries:							
1984/85	4.6	11.1	--	15.7	7.3	8.4	10.7
1985/86	5.0	12.7	--	17.7	8.4	9.3	11.1
1986/87	6.6	13.0	--	19.6	7.2	12.4	
Blueberries:							
1984/85	33.8	54.8	11.1	99.7	64.6	35.1	79.6
1985/86	20.1	54.5	10.9	85.5	47.6	37.9	65.1
1986/87	20.4	77.8	10.2	108.4	76.5	31.9	
Boysenberries:							
1984/85	1.0	3.5	2.8	7.3	5.2	2.1	5.6
1985/86	1.7	2.6	4.3	8.6	5.8	2.8	5.9
1986/87	2.7	5.5	3.4	11.6	9.5	2.1	
Raspberries:							
1984/85	10.0	19.6	3.3	32.9	14.3	18.6	22.2
1985/86	10.7	14.8	9.5	35.0	19.2	15.8	22.6
1986/87	12.4	15.3	12.6	40.3	23.8	16.5	

1/ Season beginning May 1 for strawberries, June 1 for apricots and boysenberries, October 1 for apples, and July 1 for all other items.

SOURCES: Pack data from American Frozen Food Institute; stocks, National Agricultural Statistics Service, USDA; imports, Bureau of Census, U.S. Department of Commerce.

Table 24.--U.S. Producer Price Indexes of selected dried and frozen juice items, by months, 1985-87

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1967=100												
Dried fruit:												
Prunes												
(24-1 lb. pkg.):												
1985	292.7	283.2	283.2	283.2	290.1	290.1	290.1	290.1	280.6	286.4	N.P.	286.4
1986	286.4	286.4	286.4	286.4	286.4	286.4	286.4	286.4	286.4	286.4	286.4	286.4
1987	286.4	286.4	287.3	286.4	286.4	286.4	298.6					
Raisins												
(24-15 oz. pkg.):												
1985	313.9	314.1	314.1	N.P.	321.7	N.P.	N.P.	N.P.	N.P.	350.3	N.P.	350.3
1986	341.5	341.5	355.4	345.8	345.8	351.5	358.1	367.6	359.7	374.1	374.0	378.8
1987	378.8	378.8	378.8	378.8	378.8	375.2	378.8					
Frozen juice:												
Orange, conc.												
(12-6 oz. cans):												
1985	400.8	419.1	419.4	418.3	420.2	416.9	410.7	396.7	390.1	375.7	365.6	355.1
1986	328.5	324.6	307.2	297.0	296.3	296.7	296.5	296.7	295.0	304.1	310.4	319.2
1987	332.4	336.4	338.0	346.0	341.1	343.0	342.7					

N.P. = Not published.

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

Table 25.--Fresh fruit: Retail price, marketing spreads, and grower-packer return per pound, sold in Baltimore, indicated months, 1986 and 1987

Commodity and season	Retail price	Marketing spreads		Grower-packer return 1/ (f.o.b. shipping point price)	
		Absolute	Percent of retail price	Absolute	Percent of retail price
		Cents	Percent	Cents	Percent
Apples, Appalachia Eastern					
Delicious:					
April 1986	51.3	25.3	49	26.0	51
April 1987	62.3	34.4	55	27.9	45
March 1987	59.0	31.1	53	27.9	47
Apples, Washington, Red					
Delicious:					
May 1986	89.0	45.7	51	43.3	49
May 1987	96.0	55.1	57	40.9	43
April 1987	91.0	54.6	60	36.4	40
Grapefruit, Florida:					
April 1986	28.2	15.3	54	12.9	46
April 1987	36.7	22.4	61	14.3	39
March 1987	34.8	22.7	65	12.1	35
Lemons, California:					
May 1986	89.6	64.8	72	24.8	28
May 1987	103.3	75.6	73	27.7	27
April 1987	108.3	79.4	73	28.9	27
Oranges, California navel:					
May 1986	42.6	24.7	58	17.9	42
May 1987	55.3	37.1	67	18.2	33
April 1987	53.3	35.4	66	17.9	34
Oranges, Florida:					
May 1986	46.5	35.4	76	11.1	24
May 1987	40.8	26.7	66	14.1	34
April 1987	37.5	23.4	63	14.1	37

1/Adjusted to account for waste and spoilage incurred during marketing.

SOURCES: Maryland Department of Agriculture Marketing Service, Agricultural Marketing Service, and Economic Research Service, USDA.

Table 26.--Fresh fruit: Representative truck rates for selected fruits, January-June, 1986-87 1/

Commodity, area, and city	1986						1987					
	Jan.	Feb.	Mar.	Apr.	May	June	Jan.	Feb.	Mar.	Apr.	May	June
Dollars per package												
Apples (tray packed carton)												
Yakima, Washington area to:												
Atlanta	2.80	2.80	2.80	2.80	2.80	2.80	2.05	2.93	2.00	2.88	2.88	2.80
Chicago	2.10	2.10	2.05	2.13	2.13	2.13	2.20	2.25	2.15	2.15	2.18	2.10
Dallas	--	--	--	2.28	2.28	2.28	2.30	2.30	2.30	2.30	2.33	2.33
Denver	1.50	1.50	1.50	1.55	1.55	1.55	--	1.55	1.50	1.55	1.50	1.50
Los Angeles	1.45	1.45	1.45	1.55	1.55	1.55	1.55	1.60	1.55	1.60	1.55	1.55
New York City	3.20	3.20	3.20	3.20	3.20	3.20	3.28	3.30	3.25	3.30	3.30	3.30
Hudson Valley, New York area to:												
New York City	.55	.55	.55	.55	.55	--	.58	.58	.50	.50	.58	--
Martinsburg, West Virginia area to:												
Atlanta	.93	.93	.93	.93	--	--	.80	.80	.80	.80	--	--
New York City	.80	.80	.80	.80	--	--	.72	.72	.72	.72	--	--
Grapefruit (4/5 bu. ctn.)												
Lakeland, Florida area to:												
Atlanta	.59	.58	.58	.60	.69	.60	.63	.63	.63	.60	.80	.60
Chicago	1.25	1.20	1.18	1.33	1.55	1.50	1.23	1.23	1.21	1.25	1.40	1.40
New York City	1.25	1.22	1.18	1.33	1.55	1.50	1.25	1.25	1.21	1.25	1.40	1.45
Grapes (23 lb. lug)												
Fresno area to:												
Atlanta	1.18	1.15	1.41	1.29	1.29	1.65	1.21	1.26	1.21	1.18	1.41	1.80
Chicago	1.15	1.15	1.29	1.26	1.26	1.56	1.12	1.15	1.09	1.21	1.32	1.82
Dallas	.85	.97	.97	.91	.97	1.18	.91	.91	.91	.91	.97	1.32
New York City	1.65	1.71	1.71	1.76	1.79	2.29	1.71	1.68	1.62	1.62	1.88	2.59
Citrus (7/10 bu. ctn.)												
Southern California area to:												
Atlanta	2.15	2.05	2.15	2.15	2.30	2.78	2.20	2.00	1.85	1.85	2.20	3.10
Chicago	1.90	2.00	1.95	2.00	2.15	2.40	2.05	1.85	1.85	1.85	2.15	3.00
Dallas	1.60	1.65	1.60	1.60	1.70	1.85	1.70	1.50	1.70	1.75	1.85	2.15
Denver	1.15	1.20	1.10	1.10	1.35	1.80	1.25	1.15	1.15	1.18	1.20	1.45
New York City	2.70	2.90	2.85	2.85	3.05	3.80	2.95	2.75	2.65	2.75	3.20	4.25
Oranges (4/5 bu. ctn.)												
Lakeland, Florida area to:												
Atlanta	.61	.57	.57	.62	.72	.68	.68	.68	.59	.68	.83	.73
Chicago	1.32	1.20	1.17	1.32	1.55	1.53	1.25	1.25	1.23	1.28	1.42	1.43
New York City	1.35	1.25	1.17	1.32	1.55	1.53	1.25	1.25	1.23	1.33	1.43	1.45

1/ Reported from a sample of shippers and/or truck brokers in specified areas for shippers during the first week of each month.

SOURCE: Fruit and Vegetable Truck Rate Report.

Table 27.—U.S. monthly average price indexes for fruits, selected months, 1986-1987

Item	1986						1987						
	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May.	June	July
(1967=100)													
Wholesale price index:													
Fresh fruit	275.6	274.5	273.9	271.0	272.1	272.1	255.1	261.3	268.0	250.3	251.1	260.3	256.1
Citrus	234.4	231.1	217.8	214.8	214.8	218.4	213.5	212.5	217.2	217.2	232.3	245.4	249.2
Other fruit	291.7	291.7	293.0	277.3	296.3	294.6	272.0	281.6	289.2	263.1	257.4	264.6	256.8
Dried fruit	377.4	381.5	377.9	383.8	386.1	385.0	383.6	385.1	385.6	384.9	384.9	383.6	390.6
Canned fruit and juice	315.2	317.4	311.8	310.9	314.6	320.9	322.1	322.1	323.9	321.4	324.5	331.1	330.2
Canned fruit	275.4	279.1	268.8	267.5	273.3	277.6	279.0	278.8	281.8	277.7	277.1	284.9	284.6
Canned fruit juice	260.8	377.8	379.5	260.8	379.5	389.2	390.1	390.3	390.4	390.4	399.0	403.8	402.0
Frozen fruit and juice	311.8	311.2	310.8	316.3	320.1	326.3	333.4	335.3	336.7	341.3	341.7	343.1	343.2
Consumer Price Index:													
Fresh fruit	382.2	391.5	384.5	375.1	360.6	355.8	389.1	406.7	403.9	417.9	431.8	437.5	416.7
(1977=100)													
Index of fruit prices received by growers 1/	173	188	173	181	191	167	160	175	170	166	170	199	168

1/ Index for fresh and processed.

SOURCES: Bureau of Labor Statistics, U.S. Department of Labor, and Agricultural Prices, NASS, USDA.

Table 28.—Canned citrus juices: Florida canners' packs, supplies, and movement, 1984/85-1986/87

Item and season	Carryin	Pack		Supply		Movement		Stocks 1/
		To date 1/	Total season	To date 1/	Total season	To date 1/	Total season	
1,000 cases, 24 No. 2's								
Oranges: 2/								
1984/85	1,187	6,840	7,425	8,027	8,612	6,954	7,723	1,073
1985/86	889	6,847	7,596	7,736	8,485	6,628	7,499	1,108
1986/87	986	7,257		8,243		7,061		1,182
Grapefruit: 3/								
1984/85	1,704	9,931	10,552	11,635	12,256	9,940	10,968	1,695
1985/86	1,288	9,397	9,948	10,685	11,236	8,721	9,721	1,964
1986/87	1,515	8,395		9,910		7,915		1,995
Blend:								
1984/85	100	587	615	687	715	526	579	161
1985/86	136	530	577	666	713	522	587	144
1986/87	126	493		619		466		153

1/ For 1986/87 season, week ending August 15; 1985/86, August 16; 1984/85, August 17. These respective dates include data through the 46th week of each season. 2/ Includes reconstituted orange juice. 3/ Includes reconstituted grapefruit juice.

SOURCE: Florida Citrus Processors Association.

Table 29.—Frozen concentrated citrus juices: Florida canners' stocks, pecks, supplies, and movement, 1984/85-1986/87

Item and season	Carryin	Pack		Supply		Movement		Stocks 1/
		To date 1/	Total season	To date 1/	Total season	To date 1/	Total season	
1,000 gallons 2/								
Oranges:								
1984/85	54,420	186,812	209,554	241,232	263,974	151,874	215,627	89,358
1985/86	48,347	187,838	215,124	236,185	263,471	159,648	226,476	76,537
1986/87	36,995	195,695		232,690		156,452		76,238
Grapefruit:								
1984/85	4,036	24,925	25,315	28,961	29,351	19,138	25,958	9,823
1985/86	3,386	25,404	26,174	28,790	29,560	19,148	26,138	9,642
1986/87	3,422	29,865		33,287		20,902		12,385
Tangerines:								
1984/85	304	559	797	863	1,101	368	507	495
1985/86	594	947	1,029	1,541	1,623	1,059	1,344	482
1986/87	279	836		1,115		952		163

1/ For the 1986/87 season, week ending August 15; 1985/86, August 16; 1984/85, August 17. These respective dates include data through the 37th week of each season. 2/ Oranges—42.0 degree Brix, grapefruit—40 degree Brix, and tangerines—42 degree Brix.

SOURCE: Florida Citrus Processors Association.

Table 30.—U.S exports of selected fresh noncitrus fruits, by destination, 1984/85-1986/87

Item and season 1/	Canada	Europe		Latin America	Taiwan	Hong Kong	Other	Total
		EC 2/	Total					
Metric tons								
Apples:								
1984/85	30,861	8,990	18,109	11,195	35,642	29,720	84,308	209,835
1985/86	25,202	12,046	21,144	10,852	30,065	22,920	42,609	152,792
1986/87	42,072	11,581	25,079	12,036	37,115	18,274	33,698	168,274
Grapes:								
1984/85	80,784	387	642	3,733	2,749	8,844	9,521	106,273
1985/86	64,870	675	2,064	4,300	3,733	18,129	11,102	104,198
1986/87	56,665	3,605	5,683	4,626	12,416	10,056	12,629	102,075
Pears:								
1984/85	14,300	201	2,725	3,151	--	--	7,004	27,180
1985/86	14,749	611	6,318	3,279	--	--	5,343	29,689
1986/87	18,742	948	8,249	4,259	--	--	5,115	36,365

1/ Season beginning July 1 for apples and pears, June 1 for grapes. 2/ Belgium-Luxembourg, France, West Germany, Italy, Netherlands, Greece, United Kingdom, Denmark, Ireland, Spain, and Portugal.

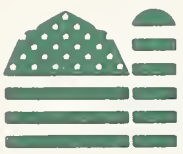
SOURCE: Foreign Agricultural Service, USDA.

Table 31.--U.S exports of selected canned noncitrus fruits, by destination, 1984/85-1986/87

Item and season 1/	Canada	Europe		Latin America	Japan	Other	Total
		EC 2/	Total				
Metric tons							
Peaches:							
1984/85	4,910	167	702	781	2,318	2,720	11,431
1985/86	3,269	244	1,286	812	6,407	2,333	14,107
1986/87	2,427	331	878	719	8,690	3,278	15,992
Fruit cocktail:							
1984/85	7,853	334	1,805	1,624	2,125	7,707	21,114
1985/86	4,313	390	1,155	1,699	3,246	6,716	17,129
1986/87	4,276	741	1,046	1,560	3,314	7,914	18,910
Cherries 3/:							
1984/85	240	45	143	27	653	925	1,988
1985/86	180	123	200	27	556	1,192	2,155
1986/87	2,018	145	197	17	730	1,047	4,009
Apricots:							
1984/85	39	87	151	48	33	238	509
1985/86	43	34	58	30	48	193	372
1986/87	50	39	57	4	27	139	277
Pears:							
1984/85	50	74	130	137	43	766	1,126
1985/86	38	51	288	59	97	293	775
1986/87	81	159	574	125	146	425	1,351

1/ Season beginning July 1 for cherries, June 1 for other canned items. 2/ Belgium-Luxembourg, France, West Germany, Italy, Netherlands, Greece, United Kingdom, Denmark, Ireland, Spain, and Portugal.
 3/ Excludes Maraschino cherries.

SOURCE: Foreign Agricultural Service, USDA.



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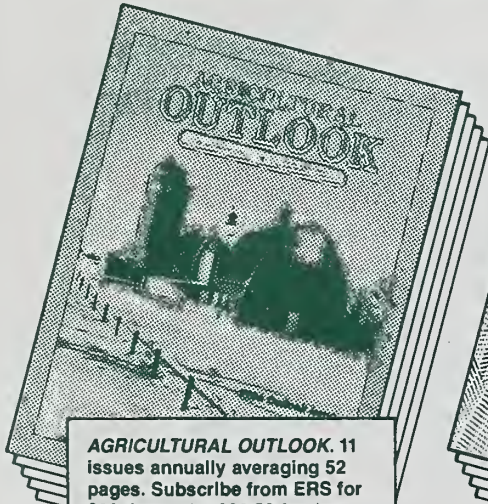
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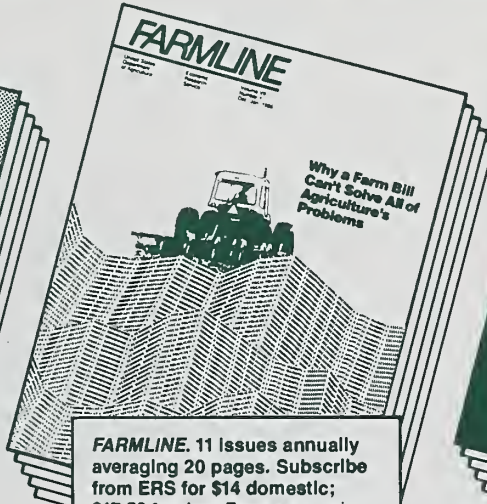
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