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THE FRUIT SITUATION

Summary

Fruit prices during the past month have continued relatively low, owing largely to weak consumer demand. Domestic demand for all fruits, however, is expected to show some improvement during the fall and winter as a result of prospective increases in consumer incomes.

Foreign demand for United States fruits may be somewhat better than last season because of the relatively light fruit crops in England and most European countries. A lower level of business activity in many countries, continued decline in the value of the French franc, and a continuation of import duties and trade restrictions which were in effect last year are factors tending partially to offset the effect of smaller foreign fruit crops.

Prospective apple production for the 1938 season declined about 2 percent during August and is now indicated at 132 million bushels, compared with 211 million bushels produced in 1937 and the 1927-36 average of 151 million bushels. Production of pears was indicated at 32 million bushels, 8 percent larger than the previous record crop of 1937, and nearly one-third larger than the 1927-36 average production. Total grape production for the 1938 season is indicated at 2.5 million tons, compared with 2.8 million tons in 1937 and the 1927-36 average of 2.2 million tons. The California grape crop is only 5 percent smaller than the record 1937 crop, but production in other important regions is much below last year's crop.

This issue of The Fruit Situation contains a series of charts relating to the various factors affecting apple prices.

FRUITS

Domestic demand

Domestic demand for all fruits is expected to show some improvement during the fall and winter as a result of prospective increases in consumer incomes. Consumer incomes have been at low levels relative to a year ago throughout the summer, but a slight improvement occurred in July and August. The September 15 issue of The Demand and Price Situation ^{1/} summarized the outlook for business activity and domestic demand as follows:

"Developments during the past month have removed nearly all doubts that there will be a substantial improvement in industrial activity, consumer incomes and domestic demand for farm products this fall. The Federal Reserve index of industrial production for July was 83 percent of the 1923-25 average, up 6 points from the June level. There was a slight improvement also in employment and factory payrolls. Orders for steel and other products going into new automobile models, together with other new business definitely in sight, seem to assure a substantial additional rise in industrial activity through the fall...

"In the present recovery, as in others, consumers' incomes and the demand for farm products are lagging behind the improvement in industrial production. Material increases in the demand for most farm products, particularly perishables, must await actual increases in the purchasing power of consumers..."

Prospective production

Apples.- Prospective apple production for the 1938 season declined about 2 percent during August and is now indicated at 132 million bushels, compared with 211 million bushels produced in 1937, and the 1927-36 average of 151 million bushels. The regional distribution of apple supplies this year is expected to be rather similar to that of the 1934 season, although the total crop this year will probably be slightly larger than in 1934.

Production this year is indicated to be relatively smallest in the Central group of States, although the prospective crop in the Atlantic Coast States is much smaller than the heavy production of last year and a little below average. Production in the Western States is expected to be about the same as it has been in each of the past 6 or 7 years.

Apple crop prospects were reduced during August in New York, Illinois, Idaho, and Washington, largely as a result of heavy insect damage. Indicated production in West Virginia is also below that of a month ago. In Massachusetts, Pennsylvania, Michigan, Virginia, and Oregon, crop prospects improved during August.

Pears.- Production of pears was indicated on September 1 at 32 million bushels, 8 percent larger than the previous record crop of 1937, and nearly one-third larger than the 1927-36 average production.

^{1/} Issued each month by the Bureau of Agricultural Economics.

Prospects remained unchanged from a month ago in Oregon, while indicated production declined slightly in Washington, due to heavy codling moth damage. Orchards in the main producing areas of both these States carried good crops of both Bartletts and Winter varieties, but considerable quantities of fruit may be allowed to remain unharvested because of low prices. In California total pear production is indicated to be the same as a month ago. Prospects in New York and Michigan improved during August, and production will be well above average in both of these States.

Grapes.- Total grape production for the 1938 season is indicated to be 2,520,570 tons compared with a crop of 2,776,770 tons in 1937 and the 1927-36 average of 2,196,516 tons. Growing conditions have been particularly favorable this year in California, and the 1938 crop in that State is expected to be 2,336,000 tons, only 5 percent less than the record crop of 1937. Raisin, table, and wine varieties are indicated to be in about the same proportion this year as a year ago.

Grape crops in important eastern producing regions are indicated to be much less than the relatively large 1937 crop, ranging from four-fifths smaller in Michigan to one-third smaller in New York. Grape prospects in Ohio declined during August, largely because of excessive rains during late July and early August which resulted in the development of black rot in some areas. Prospects on September 1 in New York, Pennsylvania, Missouri and Arkansas were unchanged from a month earlier. In Michigan conditions during August were favorable, but the crop is unusually late.

Citrus fruits.- Citrus crops from the bloom of 1938 developed under favorable conditions in all States during August. The September 1 condition of Florida oranges is slightly above that of a year ago. In California the condition of Valencias, and Navel and miscellaneous varieties improved slightly during August, and is above last year and the 1927-36 average for both classes. Condition of the Texas orange crop is materially above that of the same date last year. Prospects in Arizona showed little change from August 1.

The September 1 condition of grapefruit from the 1938 bloom was materially above last year and average in Florida and Texas, but was below average in California and Arizona. The September 1 condition of California lemons from the bloom of 1938 was 80 percent, compared with 60 percent last year.

Foreign demand for U. S. fresh fruits

Foreign demand for United States fresh fruits appears to be dependent upon at least three factors -- production of fruits in importing countries and in competing exporting countries, the level of consumer purchasing power in importing countries, and import restrictions and other factors which operate to interfere with international trade. Data concerning these factors for the current season are incomplete, but probably offer a basis for formulating at least tentative ideas concerning foreign demand for our fruits during the coming fall and winter relative to a year ago.

Fruit crops in England and most European countries are indicated to be light compared with last year and this factor points to increased foreign demand for our fruits -- particularly apples and pears. Early reports point to a much smaller apple crop in England than was produced last year. The effect of short supplies in England on the demand for United States apples may be partially offset by a relatively large crop of Canadian apples -- indicated in August at only 5 percent less than the large crop of 1937.

Early prospects point towards a much reduced crop of all fruits for greater Germany (including Austria) this season compared with last year, although prospects for apples appear to be relatively better than for other fruits.

In France, favorable growing weather during the summer has improved the prospects for apples and pears, and these crops will turn out better than expected earlier in the season. Compared with a year ago, the crop of high quality apples will be considerably lighter, but the crop of common varieties which forms the bulk of French production will be heavier. Assuming French exports to be normal, it is probable that United States apples will meet with more competition in French markets from domestic supplies, than during the 1937-38 season. Although the French pear crop has improved during the summer, total production of table varieties suitable for market is not likely to exceed 40 percent of a good year. Exportable surpluses of apples and pears from other European countries are also expected to be relatively small.

Partially offsetting the effect of short European supplies upon foreign demand for United States fruits, however, are a few other important factors. Perhaps most important among them is the continued decline in the exchange value of the French franc, which will operate to restrict purchases in the United States. With the buying rate for dealers close to 37 francs per dollar it is apparent that the French consumer must pay high prices for even the cheapest of American goods. For example, under the present exchange rate, apples costing \$1.50 f.o.b. Pacific Coast would cost c.i.f. Havre 89 francs as compared with 35 in 1935, 50 in 1936, and 71 in 1937. It does not appear that increases in wages in France have kept pace with the change in exchange rates.

Little change has been made since last season in import duties and trade restrictions in other countries. United States fresh fruits are still classed by Germany among the luxury goods and consequently are placed in an extremely unfavorable trading position. Even though the proposed trade agreement with Great Britain may include some concessions for apples, it is not likely that negotiations will be completed soon enough to be of any benefit during the current season. In the meantime, because of the existing duty on United States apples, Canadian apples have a distinct advantage in British markets. Continued weakness in the pound sterling is also an important factor in the outlook for British demand for our products.

Compared with a year ago, business activity in some of the important fruit importing countries is at a lower level. The effect of this upon consumer incomes and consequently upon demand for all products is an adverse factor in the outlook for foreign demand for United States fresh fruits.

Prices of fresh fruits

Apples:- Prices of early apples have been high relative to last year at markets in the Central States where the crop is extremely light. In the Eastern markets, however, prices have been about the same as they were a year ago. For the week ended September 10 the general average of all Eastern varieties of apples at Chicago was \$1.32 per bushel, compared with 95 cents for the corresponding week in 1937. At New York the general average for the same week was 98 cents per bushel this year and \$1.01 a year ago.

Prices of California Gravensteins have averaged materially above last year's prices in all markets, owing to the much smaller crop of this variety this year than last.

Pears:- Prices of pears in all markets continue much below last year's prices. California Bartletts averaged \$2.02 per box in Chicago the second week of September this year compared with \$2.50 a year ago. At New York similar prices were \$2.32 this year and \$2.66 in 1937. The average of all Eastern varieties at New York was \$1.21 per bushel for the week ended September 10 this year and \$1.40 a year earlier. At Chicago prices of local pears for these weeks averaged \$1.09 this year and \$1.40 last year.

Grapes:- Prices of California table grapes this season have been much below those of last year. At the shipping point, Red Malagas averaged 60 cents per lug for the week ended September 10 compared with 76 cents per lug for the corresponding week of 1937. This disparity also existed at terminal markets. Red Malagas averaged \$1.16 at New York for the second week of September this year, compared with \$1.39 a year ago.

Peaches:- Terminal market prices of peaches have shown some improvement in recent weeks and are a little higher than a year earlier. This is explained largely by the fact that the main source of supply has shifted to the late States where the crop is relatively light. At New York the average of all varieties for the second week of September was \$2.04 per bushel compared with \$1.80 the preceding week and \$1.74 a year earlier. At Chicago prices averaged \$2.03 for the second week of September, \$1.90 the week before, and \$1.98 a year earlier.

STATISTICS RELATING TO THE MARKETING OF FRESH FRUITS

Table 1.- Apples: Production by regions and selected States, average 1927-36, annual 1937 and 1938

Region and State	Average 1927-36 1/	1937 1/	Indicated 1938	1938 as percentage of average	1938 as percentage of 1937
	1,000 bu.	1,000 bu.	1,000 bu.	Percent	Percent
Total United States.....	150,728	210,673	132,231	87.7	62.8
North Atlantic	38,019	55,989	36,010	94.7	64.3
South Atlantic	24,816	39,952	23,058	92.9	57.7
Total Eastern	62,835	95,941	59,068	94.0	61.6
North Central	27,507	49,960	21,736	79.2	43.6
South Central	6,268	11,450	2,960	47.2	25.9
Total Central	33,775	61,410	24,746	73.3	40.3
Pacific Northwest	40,821	39,200	37,791	92.6	96.4
California	9,288	10,292	7,011	75.5	68.1
Other West	4,009	3,830	3,605	90.2	94.4
Total Western	54,118	53,322	48,417	89.5	90.8
Massachusetts.....	2,927	3,465	2,822	96.4	81.4
New York	17,125	24,340	15,120	88.3	62.1
New Jersey	3,484	5,463	4,249	122.0	77.8
Pennsylvania	9,465	16,728	9,541	100.8	57.0
Delaware	1,388	2,750	1,771	127.6	64.4
Maryland	1,920	2,847	2,194	114.3	77.1
Virginia	11,533	18,000	10,560	91.6	58.7
West Virginia	5,780	10,004	5,040	87.2	50.4
Ohio	6,095	12,636	4,030	66.1	31.9
Illinois	4,099	8,960	3,472	84.7	38.8
Michigan	7,731	14,432	7,260	93.9	50.3
Missouri	2,207	4,214	539	24.4	12.8
Arkansas	1,394	2,295	338	24.2	14.7

1/ Includes some quantities in some States not harvested on account of market conditions.

Table 4.-Pears: Production, total and specified States, average 1927-36, annual 1937 and 1938

State	Average		1937	Indicated	1938 as	
	1927-36	1,000 bu.			1938	percentage of average
Total United States	1/ 24,326	1/ 29,548	31,779		130.6	107.6
Pacific Coast	1/ 16,128	1/ 18,484	21,354		132.4	115.5
California	1/ 9,076	1/ 9,334	11,102		122.3	118.9
Washington	1/ 4,142	5,600	6,132		148.0	109.5
Oregon	1/ 2,910	3,550	4,120		141.6	116.1
New York	1,300	1,305	1,950		150.0	149.4
Michigan	892	1,380	1,502		168.4	108.8
All other	6,006	8,379	6,973		116.1	83.2

1/ Includes some quantities not harvested on account of market conditions.

Table 5.-Pears, California Bartlett: Weighted average auction price per box, New York and Chicago, specified weeks, 1937 and 1938

Week ended	New York		Chicago	
	1937	1938	1937	1938
	Dollars	Dollars	Dollars	Dollars
Aug. 5	2.35	1.84	2.33	1.82
12	2.28	1.82	2.22	1.81
19	2.41	1.82	2.38	1.78
26	2.42	1.72	2.31	1.65
Sept. 2	2.55	1.74	2.36	1.80
9	2.66	2.32	2.50	2.02

Table 6.- Pears, eastern 1/: L.c.l. price per bushel, New York and Chicago, by specified varieties and weeks, 1937 and 1938

		1937			1938		
Week ended		New York	N.Y.Clapp	All	New York	N.Y.Clapp	All
		Bartletts	Favorites	varieties	Bartletts	Favorites	varieties
		Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
New York							
Aug.	6	---	1.60	1.60	---	.98	.98
	13	1.50	1.49	1.49	.92	.85	.95
	20	1.52	1.58	1.51	1.01	.92	1.04
	27	1.58	1.56	1.56	.92	1.09	1.00
Sept.	3	1.42	1.47	1.50	.98	1.09	1.08
	10	1.46	1.45	1.40	1.11	1.12	1.21
Chicago							
		1937			1938		
		Michigan	Mich.Clapp	All	Michigan	Mich.Clapp	All
		Bartletts	Favorites	varieties	Bartletts	Favorites	varieties
		Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
Aug.	6	---	---	1.41	---	1.34	1.34
	13	---	2/1.55	1.40	2/1.20	.99	1.02
	20	---	1.38	1.38	1.09	.87	.94
	27	1.54	1.36	1.37	.96	.88	.90
Sept.	3	1.39	1.20	1.30	1.10	.92	1.04
	10	1.49	1.39	1.40	1.22	---	1.09

1/ 2-2½ inch size.

2/ Average for 1 day.

Table 7.- Grapes: Production, total and specified States, average 1927-36, annual 1937 and 1938

State	Average		1937	Indicated 1938	1938 as per-	
	1927-36				centage of	
	1,000 tons	1,000 tons			Percent	Percent
Total United States	1/ 2,197	1/ 2,777	2,521	114.7	90.8	
California	1/ 1,929	2,454	2,336	121.1	95.2	
Raisin varieties	1/ 1,126	1,407	1,339	118.9	95.2	
Wine "	1/ 450	631	603	134.0	95.6	
Table "	1/ 353	416	394	111.6	94.7	
New York	74	89	59	79.7	66.3	
Michigan	61	1/67	15	24.6	22.4	
Ohio	27	38	13	48.1	34.2	
Pennsylvania	22	26	18	81.8	69.2	
Missouri	9	12	7	77.8	58.3	
Arkansas	10	13	6	60.0	46.2	
All other	65	78	67	103.1	85.9	

1/ Includes some quantities not harvested on account of market conditions.

Table 8.-Grapes, California: Price per lug, carloads, f.o.b. cash track and California acceptance, by specified weeks and varieties, 1937-38

Week ended <u>1/</u>	Thompson		Red Malaga		Ribier	
	Seedless					
	1937	1938	1937	1938	1937	1938
	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
Aug. 6	.95	.74	1.31	1.12	1.46	1.34
13	.83	.64	1.16	.98	1.27	1.22
20	.74	.62	.98	.89	1.08	1.08
27	.70	.59	.84	.76	.91	.91
Sept. 3	.71	.56	.81	.67	.90	.82
10	.70	.56	.76	<u>2/</u> .60	.86	.76

1/ Based on 1938 calendar.

2/ Average for 1 day.

Table 9.-Grapes, California: Weighted average auction price per lug at New York and Chicago, by specified varieties and weeks, 1937-38

Market and week <u>1/</u>	Thompson		Red Malaga		Ribier	
	Seedless					
	1937	1938	1937	1938	1937	1938
	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
<u>New York</u>						
Aug. 6	2.18	1.86	2.93	2.31	2.95	2.63
13	1.63	1.32	1.82	1.73	2.58	1.98
20	1.28	1.48	1.31	1.28	1.78	1.98
27	1.45	1.44	1.39	1.37	1.76	1.96
Sept. 3	1.67	1.14	1.22	1.23	1.50	1.46
10	1.60	1.14	1.39	1.16	1.67	1.52
<u>Chicago</u>						
Aug. 6	1.66	1.51	2.33	2.04		2.38
13	1.60	1.28	1.79	1.86	2.34	1.81
20	1.41	1.33	1.46	1.55	1.76	1.92
27	1.22	1.21	1.17	1.20	1.27	1.70
Sept. 3	1.43	1.04	1.23	1.15	1.42	1.44
10	1.41	1.08	1.28	1.07	1.60	1.24

1/ Based on 1938 calendar.

Table 10.- Peaches, all varieties: Weekly average l.c.l. price per bushel at New York and Chicago, 1936-38.

Week ended in 1938	New York			Chicago		
	1936	1937	1938	1936	1937	1938
	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
May 7			4.00			
14			3.75			3.10
21			2.90			2.90
28			2.53	3.33		2.23
June 4	3.62	4.55	1.92	4.00	3.90	2.16
11	2.72	3.87	1.93	2.67	3.53	1.69
18	2.24	3.15	1.66	2.39	3.08	1.66
25	2.37	2.90	1.90	2.52	2.58	1.96
July 2	2.50	3.17	1.99	2.01	2.30	2.34
9	2.60	3.35	1.70	3.04	3.06	1.62
16	3.40	3.18	1.66	4.00	3.46	1.84
23	2.37	2.73	1.79	2.58	2.95	1.94
30	2.05	2.23	2.04	2.38	2.26	2.30
Aug. 6	2.30	1.94	2.49	2.54	2.06	2.24
13	2.12	1.77	1.90	2.54	1.79	1.78
20	1.98	1.82	1.78	2.41	1.90	1.81
27	2.04	2.27	1.77	2.22	1.80	2.17
Sept. 3	2.31	1.47	1.80	2.11	1.58	1.90
10	2.10	1.74	2.04	1.80	1.98	2.03
17	2.38	1.69		1.94	1.62	
24	2.67	1.49		1.70	1.39	
Oct. 1	2.55	1.56		2.08	1.60	
8	2.98	1.65		2.12	1.58	
15	---	1.88			1.44	
22	---	1.75				
29	---	1.62				

1/ Includes some generally fair in color.

Table 11.- Peaches, Elberta: Price per bushel, carloads and truckloads, f.o.b. usual terms, 1936-38 1/

Week ended 1938	F.o.b. cash-track		F.o.b. usual terms		
	Anna, Illinois <u>2/</u>		Benton Harbor, Michigan		
	1937	1938	1936	1937	1938
	<u>Dollars</u>	<u>Dollars</u>	<u>Dollars</u>	<u>Dollars</u>	<u>Dollars</u>
Aug. 6	<u>3/</u> 1.42	1.70			
13	: 1.39	1.23			
20	: 1.50				
27	: 1.47				2.02
Sept. 3	:		1.66	1.60	1.52
10	:		1.60	1.49	1.60
17	:		1.79	1.31	
	:				

1/ Range 2 to 2 1/2 inches.

2/ Not reported in 1936.

3/ Average for one day.

Table 12.- Oranges: Weekly shipments from producing areas, by varieties and totals, July to September 1937 and 1938

		1937			1938			
Week ended		Calif.-	Fla.	Total	Calif.-	Fla.	Total	
		Ariz.	Valen-	Valen-	Ariz.	Fla.	Com-	
		Fla.	cias	1/	Valen-	2/	mercial	
					cias	2/	1/	
					2/		3/	
		Cars	Cars	Cars	Cars	Cars	Cars	
July	2 ...	1,000	125	1,125	1,648	263	1,911	81
	9 ...	874	61	935	1,806	108	1,914	62
	16 ...	1,131	3	1,134	1,890	77	1,967	92
	23 ...	1,063	2	1,065	2,071	9	2,080	106
	30 ...	1,002	4	1,006	1,741	7	1,748	82
Aug.	6 ...	874	4	878	1,733	5	1,738	88
	13 ...	914	3	917	1,565	2	1,567	81
	20 ...	806	2	808	1,635	-	1,635	91
	27 ...	919	3	922	1,630	-	1,630	86
Sept.	3 ...	843	1	844	1,765	-	1,765	105
	10 ...	990	3	993	1,414	-	1,414	111

1/ Includes shipments from Texas, Louisiana, Alabama and Mississippi, also Florida tangerines. 2/ Excluding relief shipments. 3/ Purchases made by Federal Surplus Commodities Corporation.

Table 13.- Grapefruit: Weekly shipments from producing areas and totals, July to September 1937 and 1938

		1937 1/			1938		
Week ended		Florida	California-	Total	Florida	California-	Total
		Ariz.	Arizona		Ariz.	Arizona	
		Cars	Cars	Cars.	Cars	Cars	Cars
July	2 ...	16	56	72	32	71	103
	9 ...	3	51	54	13	118	131
	16 ...	3	52	55	15	85	100
	23 ...	2	28	30	3	91	94
	30 ...	3	33	36	1	88	89
Aug.	6 ...	3	27	30	5	91	96
	13 ...	1	30	31	1	113	114
	20 ...	2	26	28	2	75	77
	27 ...	3	31	34	4	40	44
Sept.	3 ...	5	16	21	35	32	67
	10 ...	49	15	64	174	10	184

1/ Excluding relief shipments which for the entire season amounted to 1,822 cars from Florida, and 2,924 cars from Texas.

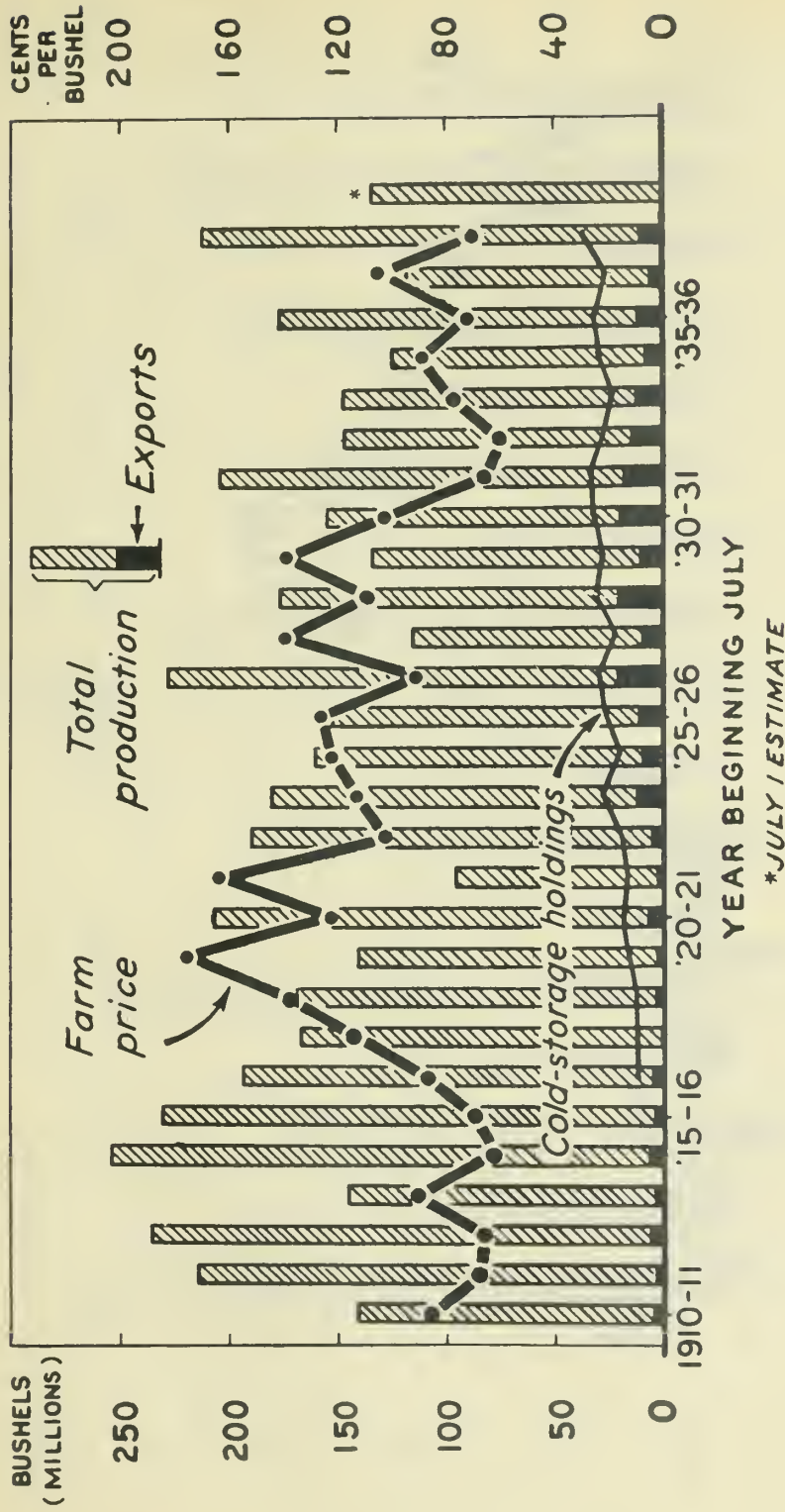
Table 14.-Citrus fruits: Weighted average auction prices per box, New York and Chicago, June to September, 1937 and 1938

Week ended 1/	Oranges				Grapefruit				Lemons	
	Calif. Valencias:		Fla.		Fla.		Calif.		Calif.	
	1937	1938	1937	1938 2/	1937	1938 2/	1937	1938	1937	1938
	Dol.	Dol.	Dol.	Dol.	Dol.	Dol.	Dol.	Dol.	Dol.	Dol.
New York :										
June 4 :	4.45	2.55	3.34	2.46	2.95	2.33	---	---	6.12	4.10
11 :	4.59	2.68	3.53	2.73	3.36	2.03	---	---	6.99	3.93
18 :	4.74	2.67	3.66	2.49	4.11	1.64	---	3.06	6.73	3.79
25 :	4.93	2.77	3.82	2.32	3.76	1.46	4.04	2.31	6.08	4.19
Mo. av. :	4.75	2.76	3.68	2.52	3.44	1.91	4.17	2.40	6.27	4.12
July 9 :	5.08	2.98	4.63	2.64	3.22	1.59	4.76	2.40	6.04	4.16
16 :	5.44	2.93	5.13	2.56	2.50	1.73	3.84	2.28	7.36	4.39
23 :	5.31	3.31	4.77	2.27	---	1.51	3.26	2.64	6.15	4.23
30 :	5.65	3.36	---	2.42	---	1.24	3.33	2.84	5.80	3.69
Mo. av. :	5.39	3.15	4.88	2.52	2.79	1.47	3.60	2.54	6.34	4.13
Aug. 6 :	5.49	3.32	---	2.57	---	1.56	3.38	3.40	5.29	4.39
13 :	5.38	3.16	---	2.60	---	---	3.79	3.25	5.60	4.00
20 :	5.21	3.18	---	2.51	---	---	3.44	2.80	5.53	4.55
27 :	5.38	3.42	---	---	---	---	3.25	2.89	6.66	4.73
Mo. av. :	5.36	3.28	---	---	---	---	3.47	3.02	5.69	4.42
Sept. 3 :	5.38	3.23	---	---	---	---	2.86	2.71	6.45	4.54
10 :	5.50	3.28	---	---	---	---	3.13	2.53	7.24	4.04
:										
:										
Chicago :										
June 4 :	4.71	2.76	3.36	2.58	2.80	2.16	---	---	6.49	3.90
11 :	4.57	2.93	3.98	3.27	4.21	2.64	2.72	---	6.56	3.91
18 :	4.82	2.72	3.98	2.71	4.02	1.91	---	2.53	6.44	4.02
25 :	4.82	2.68	4.02	2.62	5.16	1.46	---	1.91	6.49	4.57
July 2 :	4.64	2.79	4.71	3.13	4.34	1.45	2.60	1.85	6.18	4.62
Mo. av. :	4.70	2.78	3.78	2.90	3.27	2.07	2.86	2.17	6.44	4.29
July 9 :	4.67	2.86	4.03	2.99	3.49	1.31	3.76	1.31	5.99	4.47
16 :	5.19	3.22	---	3.48	---	.73	3.48	1.78	6.64	4.71
23 :	5.47	3.12	---	---	---	---	3.47	2.21	5.89	3.96
30 :	5.51	3.10	---	---	---	---	3.02	2.44	5.64	3.61
Mo. av. :	5.18	3.07	4.03	3.08	3.49	1.05	3.41	1.87	6.12	4.29
Aug. 6 :	5.18	3.11	---	---	---	---	2.63	2.86	5.18	4.07
13 :	5.30	3.11	---	---	---	---	2.54	2.58	5.44	4.45
20 :	5.29	3.05	---	---	---	---	1.64	2.31	5.97	4.34
27 :	5.36	3.21	---	---	---	---	2.95	2.79	6.21	4.29
Mo. av. :	5.29	3.14	---	---	---	---	2.55	2.62	5.80	4.31
Sept. 3 :	5.40	3.27	---	---	---	---	3.46	2.33	7.06	4.45
10 :	5.42	3.22	---	---	---	---	3.27	1.94	7.01	4.25
:										

1/ Based on 1938 calendar.

2/ Includes Bruce boxes.

Apples: Production, Cold-Storage Holdings, Exports, and Price Received by Producers, United States, 1910-38



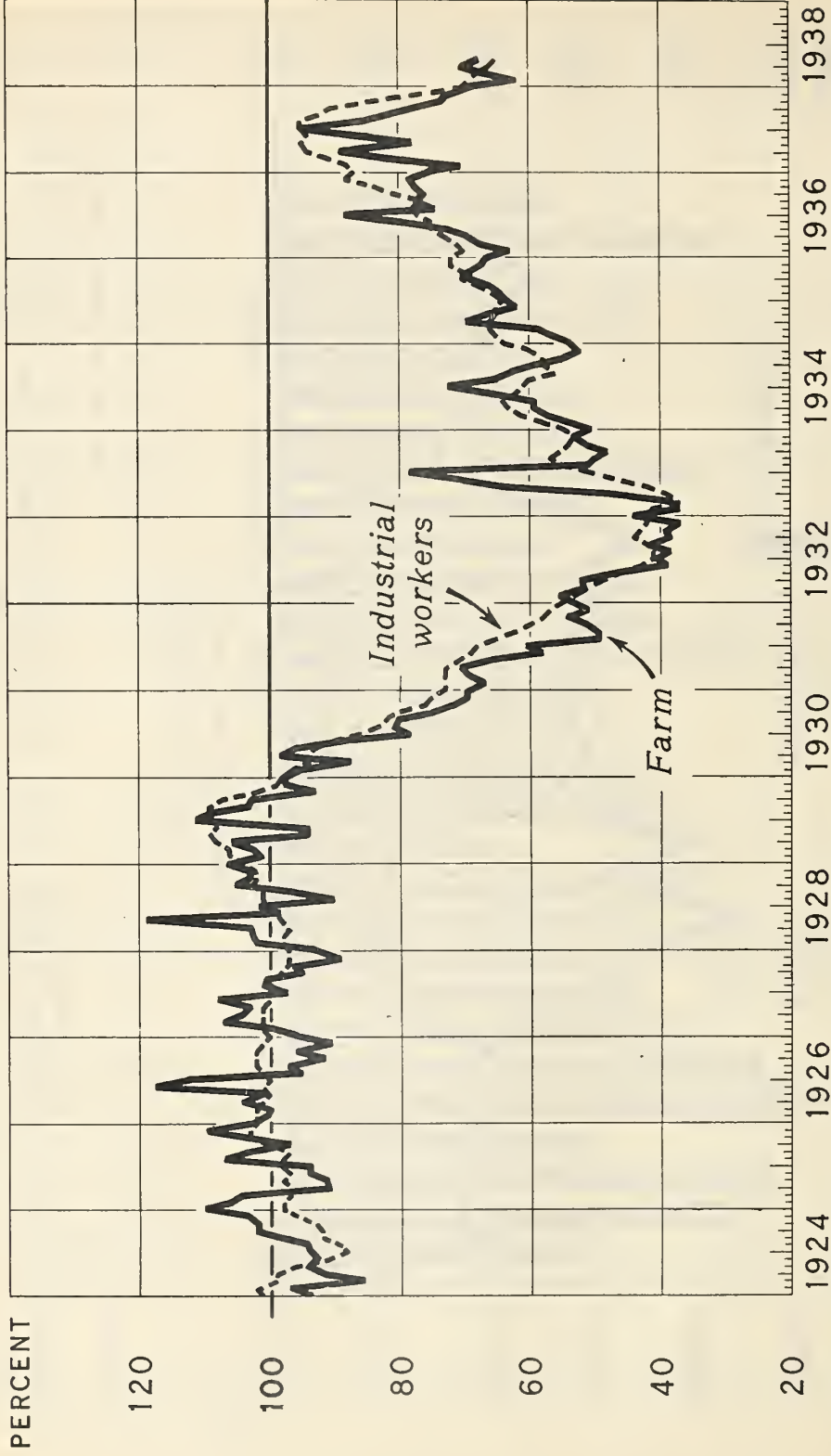
U. S. DEPARTMENT OF AGRICULTURE

NEG. 20706-B BUREAU OF AGRICULTURAL ECONOMICS

During the period, 1921-30, year to year changes in the average price received by apple producers were closely associated with changes in the total production of apples. Since 1930, however, changes in production do not appear to have been so important in determining changes in prices. For example, in the 1932-33 season apple production was nearly one-third less than in the 1931-32 season, but the season average price for 1932-33 was several cents per bushel less than that of a year earlier. Changes in consumer purchasing power have been responsible for a large proportion of the variation in season average apple prices in recent years.

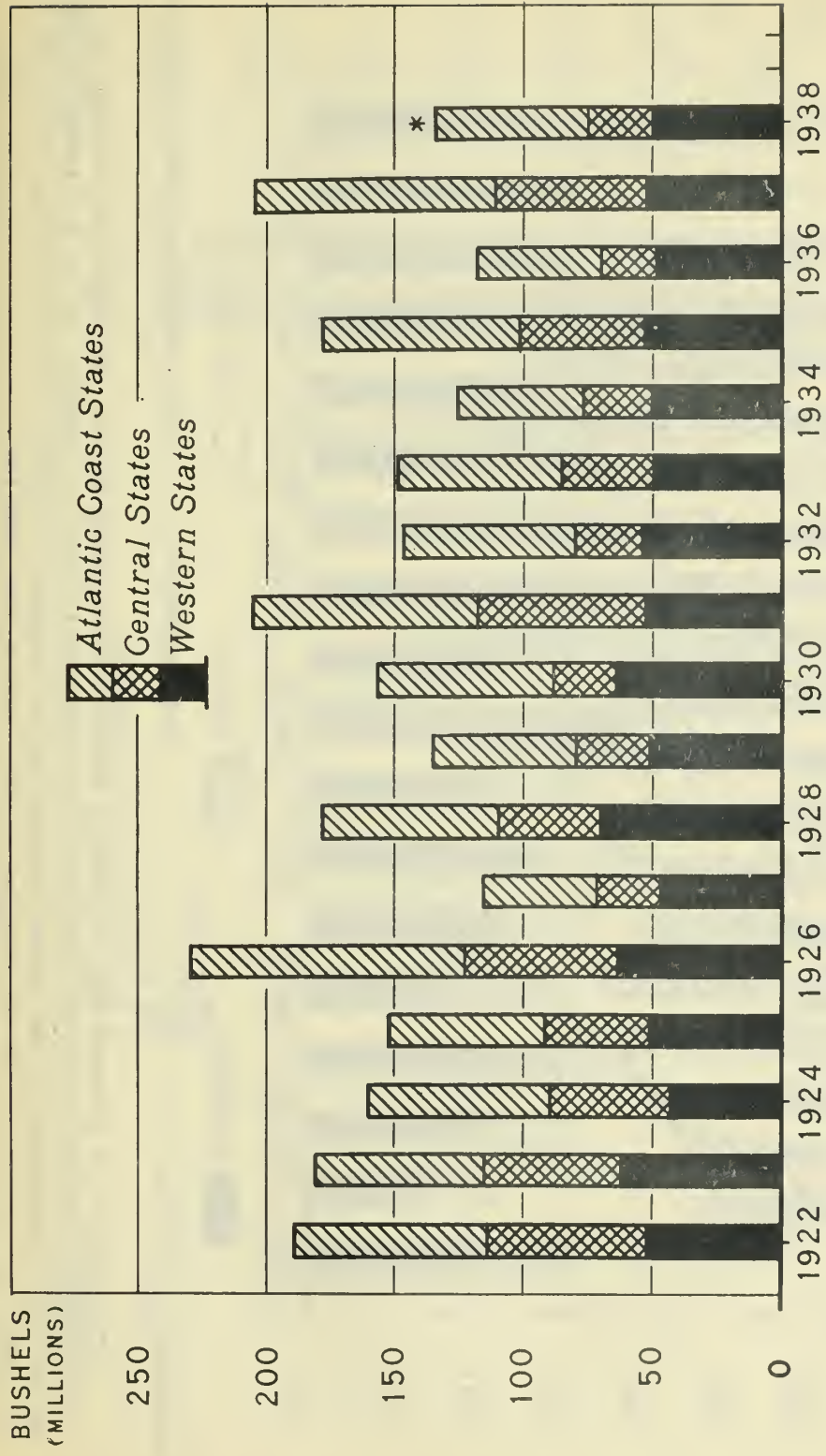
CASH INCOME FROM FARM MARKETINGS AND INCOME OF INDUSTRIAL WORKERS, UNITED STATES, 1924 TO DATE

INDEX NUMBERS (1924-29 = 100) ADJUSTED FOR SEASONAL VARIATION



Variations in the cash income from apples as well as from all farm marketings are closely associated with changes in the income of industrial workers. At the beginning of the 1938 apple marketing season income of industrial workers is approximately 30 percent less than a year ago. However, it now seems likely that some improvement may occur in the remainder of the season.

APPLES: U. S. PRODUCTION BY REGIONS, 1922-38



* INDICATED JULY 1

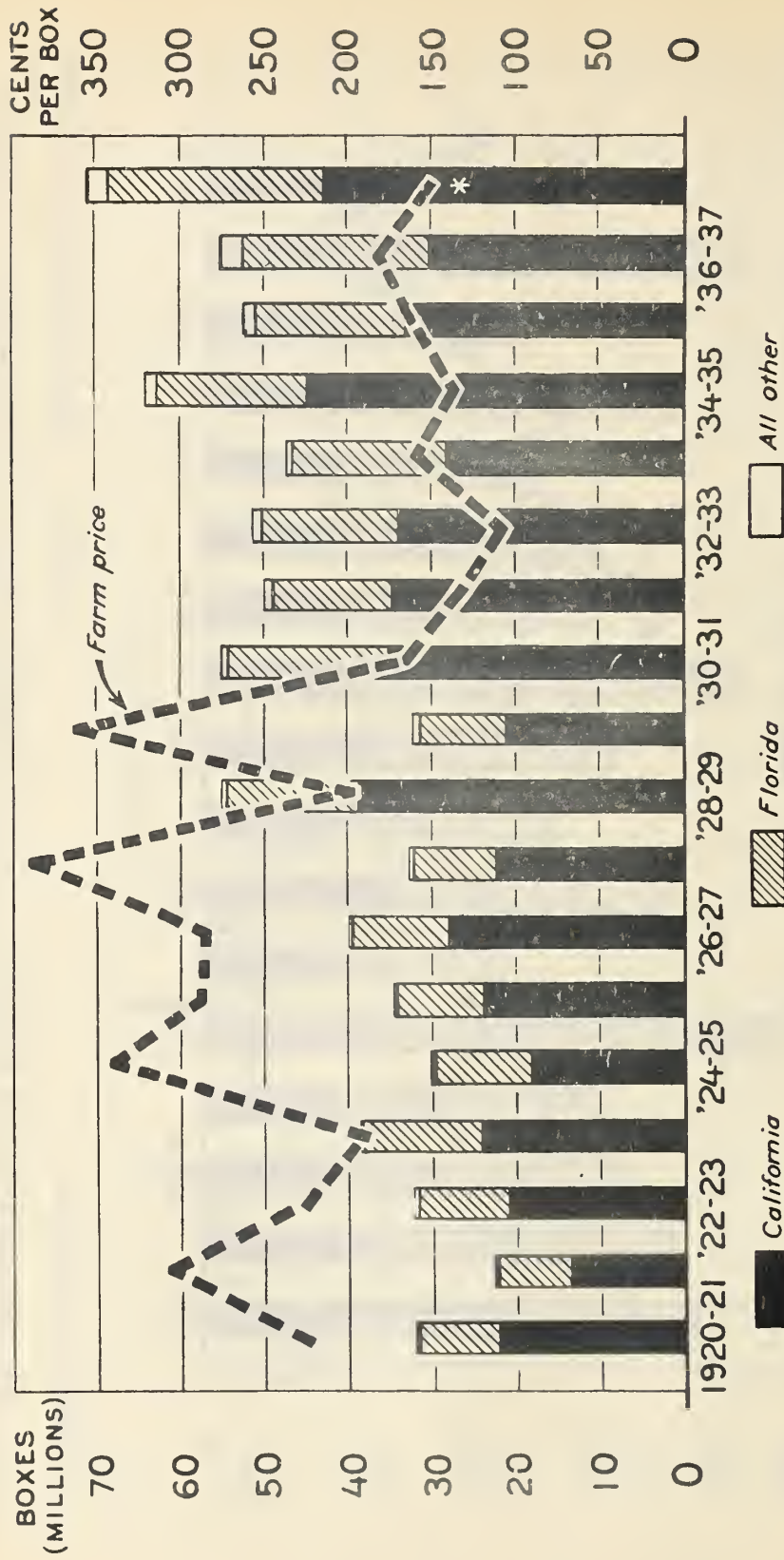
U. S. DEPARTMENT OF AGRICULTURE

NEG. 34514

BUREAU OF AGRICULTURAL ECONOMICS

The 1938 apple crop is indicated to be about one-third smaller than the large crop of 1937. Production is expected to be relatively lightest in the Central States, although the crop in the Atlantic Coast States is indicated to be much smaller than the large crop of last year. Production in the Western States is expected to be about the same as it has been in each of the past 6 or 7 years. The quantity and location of apple supplies this year will probably be somewhat similar to the situation in 1934.

Orange Production and Farm Price 1920-21 to Date

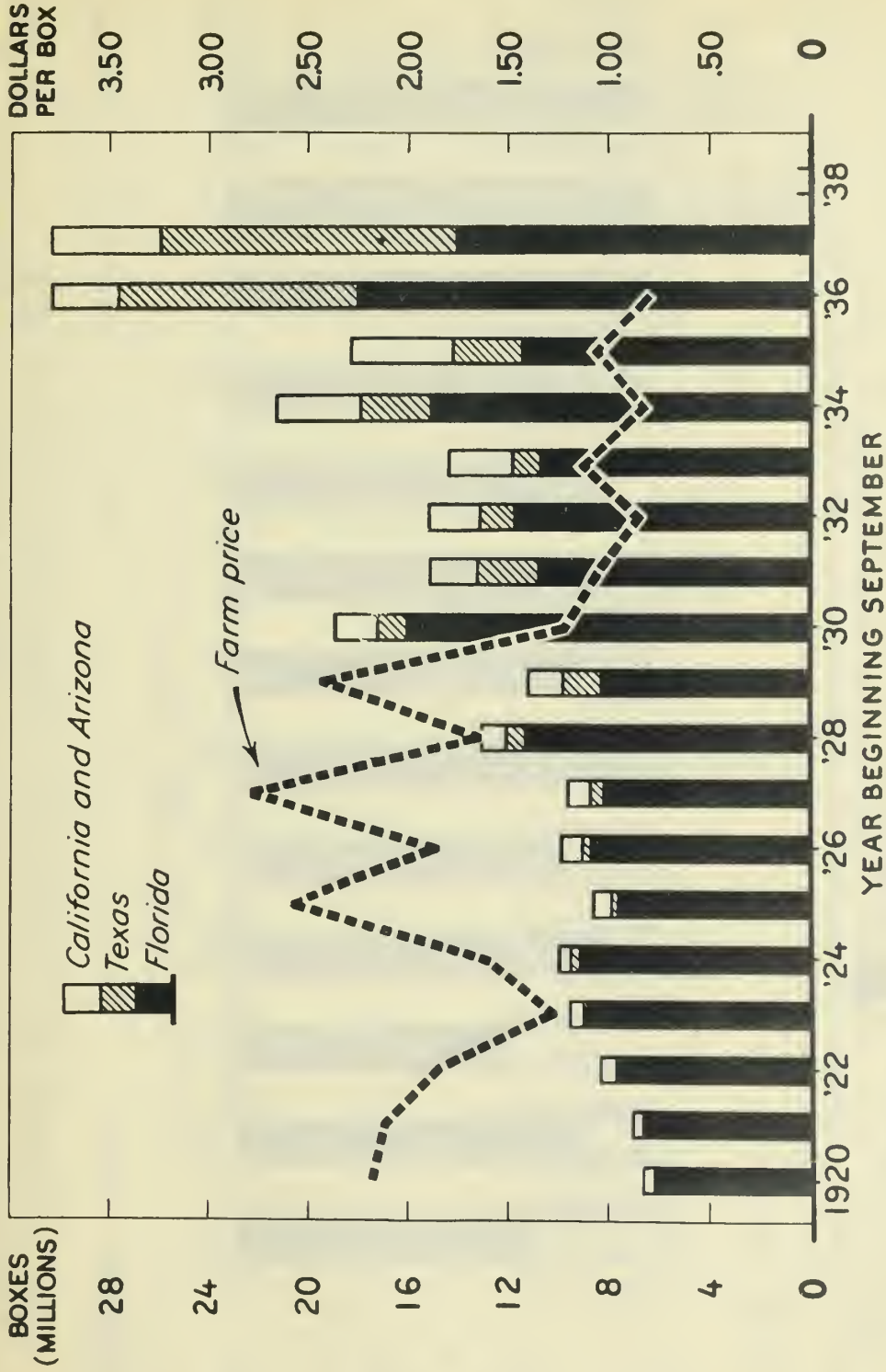


U.S. DEPARTMENT OF AGRICULTURE NEG. 23742-B BUREAU OF AGRICULTURAL ECONOMICS

* PRELIMINARY

Production of oranges has followed a steady upward trend during the past two decades, and the total orange production for the 1937-38 season was the largest on record. It is too early in the season for an estimate of the actual production of oranges in 1938-39, but conditions on August 1 this year were as favorable for oranges as they were a year earlier.

Grapefruit Production and Farm Price, 1920-37

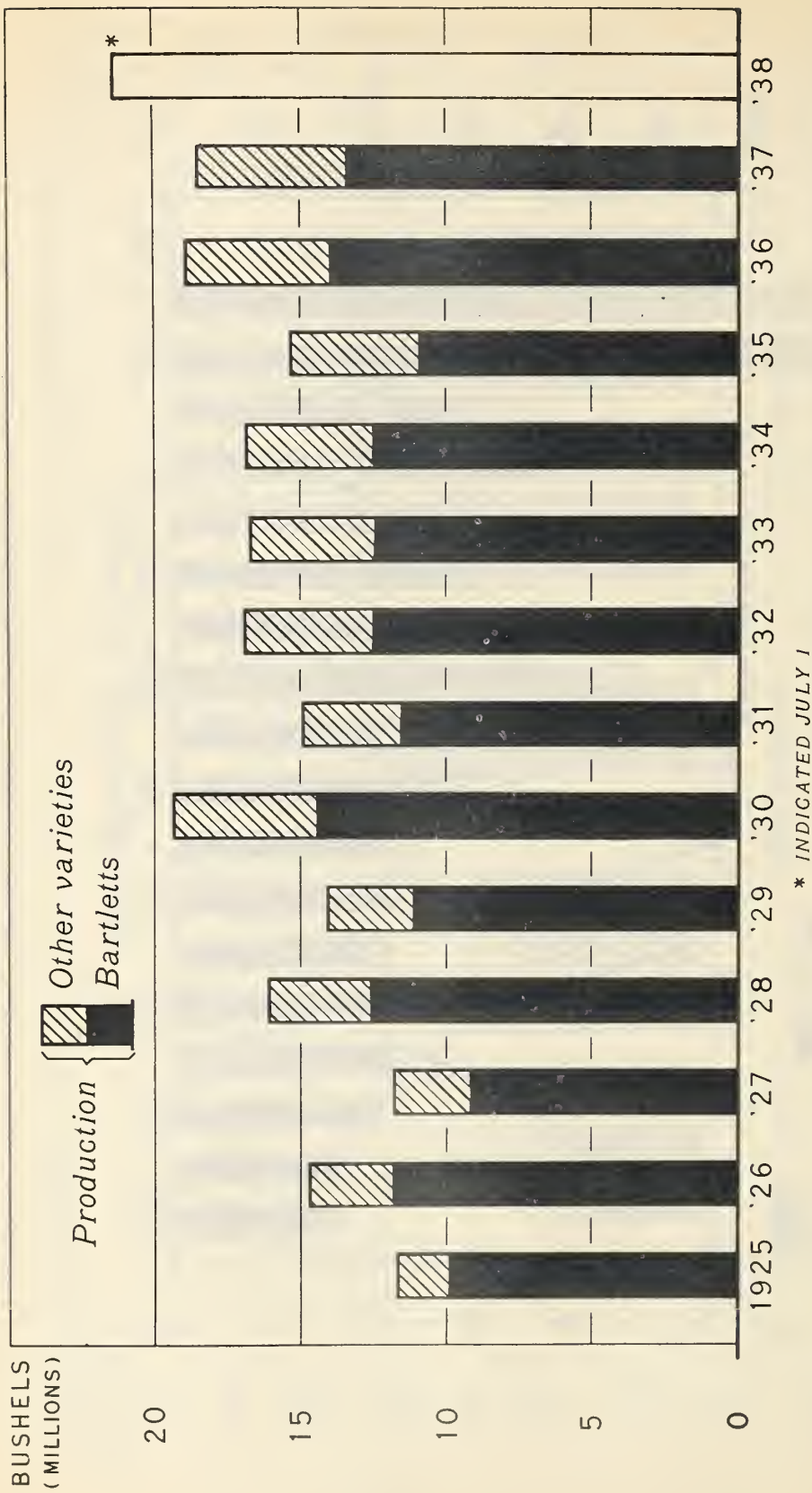


U. S. DEPARTMENT OF AGRICULTURE

NEG. 23741-8 BUREAU OF AGRICULTURAL ECONOMICS

Grapefruit production has increased sharply in recent years and production in each of the last two seasons has been nearly twice as great as the average of the preceding 10-year period. It is too early for an estimate of the 1938-39 grapefruit crop, but conditions on August 1 were even more favorable this year than a year earlier.

PEARS: WASHINGTON, OREGON, AND CALIFORNIA PRODUCTION BY VARIETAL GROUPS, 1925-38



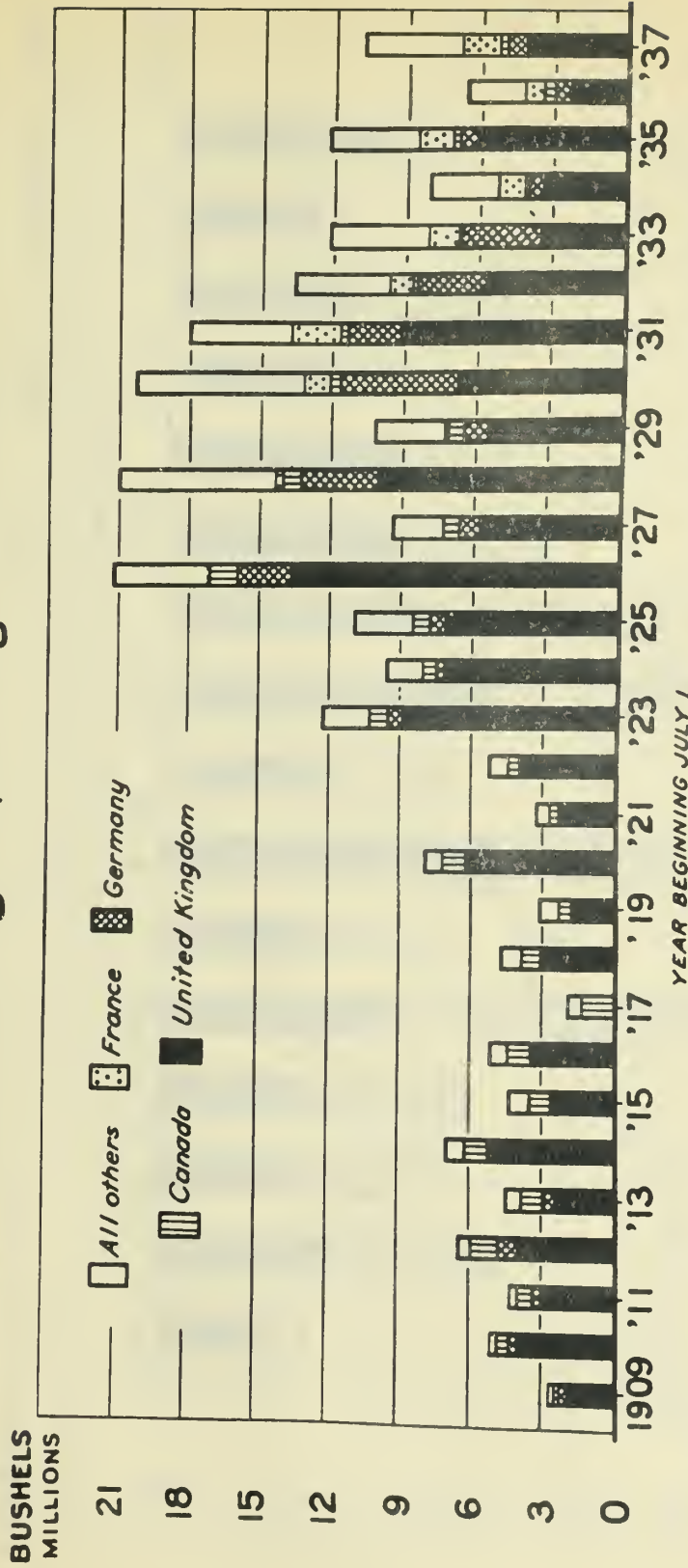
U. S. DEPARTMENT OF AGRICULTURE

NEG. 32710

BUREAU OF AGRICULTURAL ECONOMICS

Pears compete with apples, and the total production of pears in the United States has followed a steady upward trend during the last two decades. The 1938 production is indicated to be the largest on record.

Apples: United States Exports and Quantities Taken by Leading Importing Countries



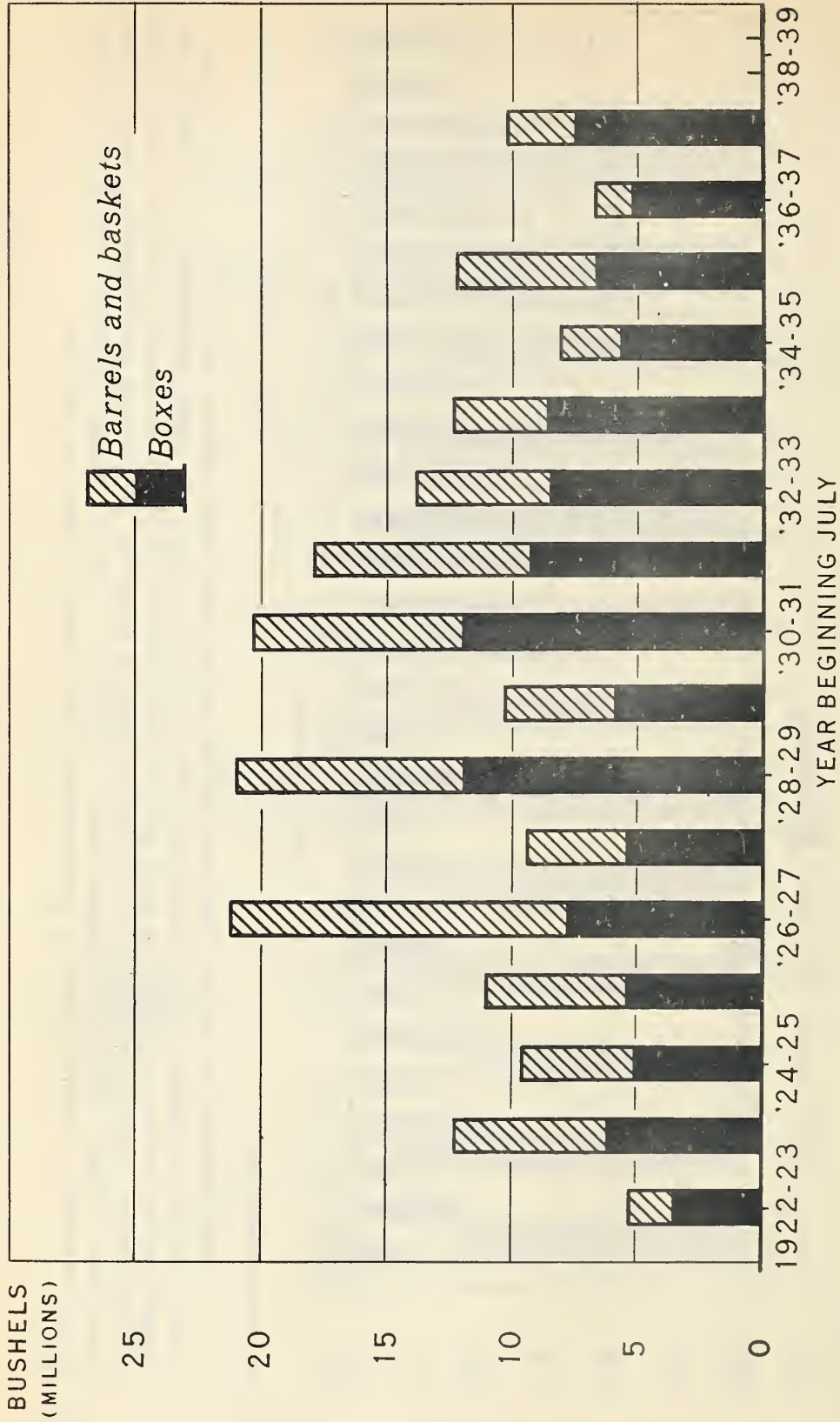
U. S. DEPARTMENT OF AGRICULTURE

NEG. 20391-B

BUREAU OF AGRICULTURAL ECONOMICS

Total exports of apples from the United States have been reduced materially in recent years owing largely to import restrictions and duties raised by many European countries. In 1934 Germany placed United States apples in a very unfavorable trading position by classing them as luxury goods, and requiring that for each dollar's worth of apples exported to Germany the exporting country must take three dollars worth of German products. Exports of United States apples to the United Kingdom have suffered in recent years by preferential duty favoring Canadian apples.

APPLES: U. S. EXPORTS BY TYPE OF CONTAINER, 1922-37



U. S. DEPARTMENT OF AGRICULTURE

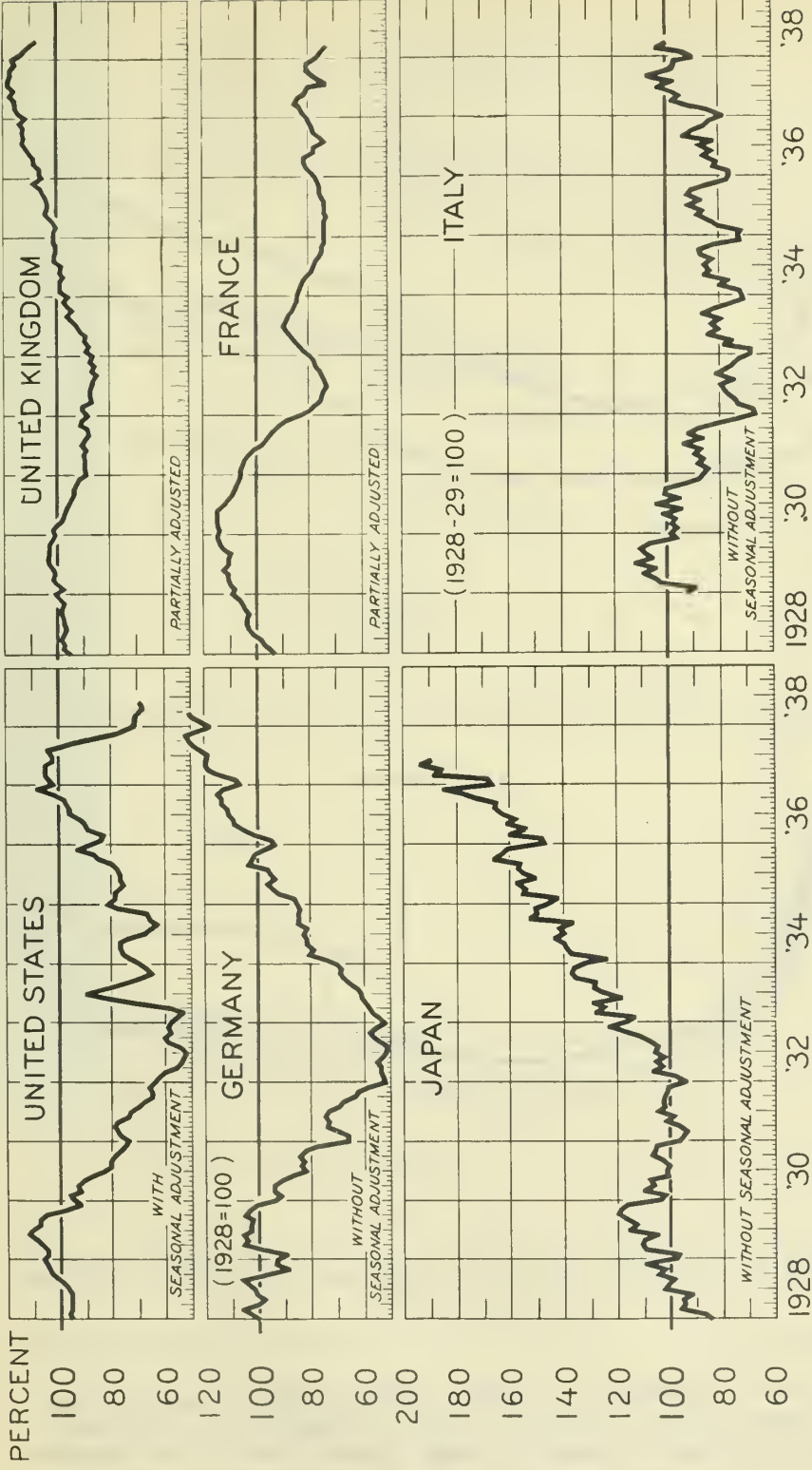
NEG. 34513

BUREAU OF AGRICULTURAL ECONOMICS

Exports of apples from all regions in the United States have declined in recent years, but the greatest decline has occurred in exports from those areas which pack their export apples in barrels and baskets.

INDUSTRIAL PRODUCTION, UNITED STATES AND SELECTED FOREIGN COUNTRIES, 1928 TO DATE

INDEX NUMBERS (1927-29 = 100)



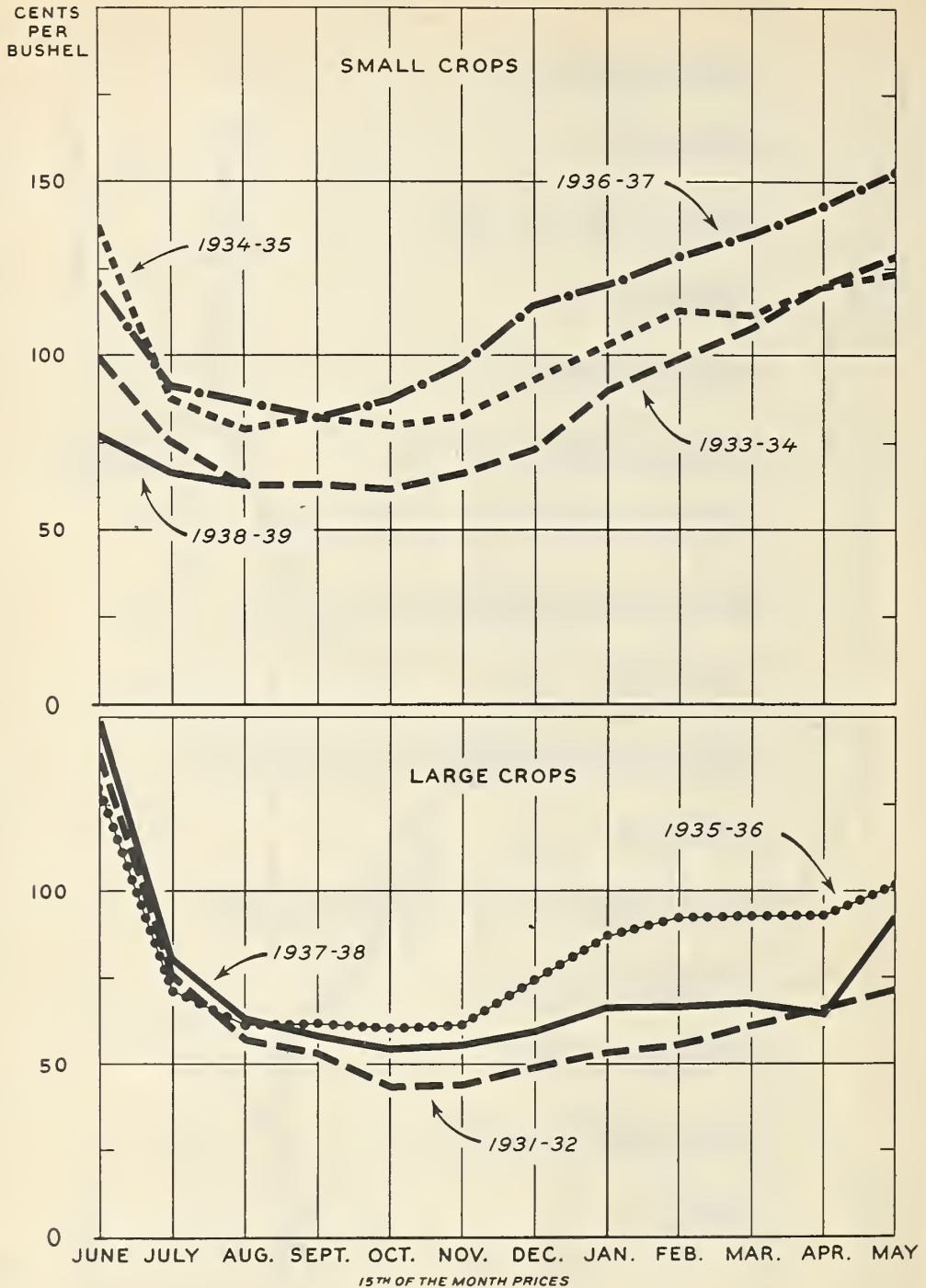
U.S. DEPARTMENT OF AGRICULTURE

NEG 25959

BUREAU OF AGRICULTURAL ECONOMICS

Industrial production in important apple importing countries has followed varied trends during the last year. In Germany, industrial production has continued the sharp upward trend which began in 1932. In the United Kingdom, industrial production has declined materially during the past year and at present is at about the same level as 2 years earlier. In France business conditions have shown no improvement since 1932 and industrial production is at a relatively low level.

APPLES: AVERAGE PRICE RECEIVED BY PRODUCERS,
SOUTH ATLANTIC STATES, SELECTED YEARS



Past experience indicates that in years of small crops the seasonal rise from the low point reached in the fall has been larger than in years of large crops. This is particularly true in a year when the small crop is accompanied by steady improvement in consumer purchasing power during the season.