United States Department of Agriculture

FTS-345

Nov. 30, 2010

A Report from the Economic Research Service

www.ers.usda.gov

Fruit and Tree Nuts Outlook

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U.S. Citrus Production Forecast Up in 2010/11

The next release is March 30, 2011

Approved by the World Agricultural Outlook Board.

USDA's National Agricultural Statistics Service (NASS) forecasts 2010/11 U.S. citrus production at 11.9 million tons, up 9 percent from last season and virtually the same as 2 seasons ago. Production of all citrus crops is forecast higher than last year, except for grapefruit.

NASS forecast California's orange crop at 2.4 million tons, up 14 percent from last season and nearly 39 percent above 2008/09. Both the navel and Valencia orange crops are forecast higher this season, with navels accounting for 77 percent of production. Despite reports of good quality, the larger expected crop and potentially smaller fruit size this season may place downward pressure on grower prices for fresh oranges this season.

Florida's orange production, 95 percent of which is used to make juice, is forecast at 6.6 million tons, a 9-percent increase from last season but 10 percent lower than 2008/09. Adequate beginning stocks of orange juice and higher production of oranges available for processing will keep the orange juice market well supplied this year, while domestic consumption is likely to continue to wane, consistent with the long term trend. The combination of adequate stocks, weaker domestic consumption, and increased availability of oranges for processing is expected to limit any price gains compared to last season.

NASS forecast the U.S. 2010/11 grapefruit crop at 1.2 million tons, down less than 1 percent from last season but the fourth consecutive season of declining production, and the second lowest level dating back to 1980. Florida's crop accounts for 70 percent of the total, with Texas and California producing the remainder. Florida shipments began slowly this season. Prices are likely to remain similar to last year based on reports of good quality and the potential for strong exports to Japan—the leading market for Florida's fresh grapefruit.

NASS forecast the 2010/11 U.S. lemon crop at 948,000 tons, 10 percent higher than the 2009/10 crop. Tangerine and mandarin production is forecast 5 percent more than last season. In California, fresh tangerine/mandarin prices are likely to remain strong as its industry continues to grow and its markets continue to expand.

Price Outlook

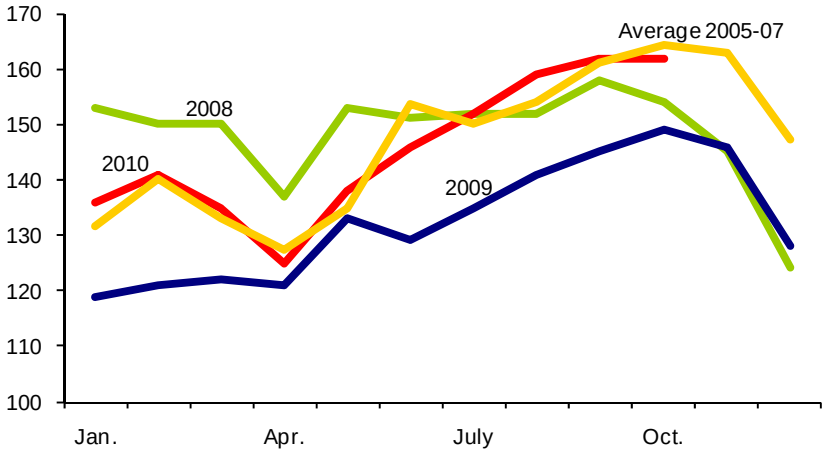
Fruit and Nut Grower Prices Continue Upward

The index of prices received by fruit and tree nut growers rose 7 percent in October 2010 compared with the October 2009 index, from 152 to 162 (1990-92=100). The October grower price index was unchanged from the previous month and both were the highest index since December 2007 (fig. 1). The strong index in October reflects the higher grower prices for fresh-market apples, pears, grapes and lemons (table 1). The price increases for these commodities in October more than offset significant price declines for grapefruit and fresh-market strawberries.

Lemon prices remained strong in October, receiving 37 percent higher prices from this time last year. Most of last-season's California lemon crop was finished by October and unusually wet weather reduced beginning-season supplies, causing the increase in grower prices. Wet weather that is causing delays for lemons also ended the strawberry season in the Salinas and Watsonville growing districts and caused some quality problems. Though fresh-market strawberry prices averaged less than last year, grower prices have increased 8 percent since September, representing low supply. Orange prices could be pressured down by the forecast larger 2010/11 crop and the smaller-than-average orange sizes, which are less desirable on the international market.

Continued tight supplies have maintained higher grower prices for fresh-market pears through October, with a 26 percent increase over the October 2009 average price. September fresh-market apple prices declined 2 percent but increased 12 percent in October, over the same time last year. Lower-than-average fresh-market apple supplies are being reported in storage facilities, resulting from the smaller harvest this fall. Grape growers have also received higher prices in September and October, an increase of 62 and 16 percent, respectively.

Figure 1
Index of prices received by growers for fruit and tree nuts
1990-92=100



Source: USDA, National Agricultural Statistics Service, *Agricultural Prices*.

Table 1--Monthly fruit prices received by growers, United States

Commodity	2009		2010		2009-10 change	
	September	October	September	October	September	October
	Dollars per box				*Percent*	
Citrus fruit: 1/						
Grapefruit, all	6.55	16.41	4.70	1.10	-28.2	-93.3
Grapefruit, fresh	7.15	19.80	4.70	1.10	-34.3	-94.4
Lemons, all	17.60	15.59	19.96	21.34	13.4	36.9
Lemons, fresh	27.06	24.77	28.60	26.20	5.7	5.8
Oranges, all	--	--	7.12	6.68	--	--
Oranges, fresh	--	--	10.69	9.99	--	--
	Dollars per pound					
Noncitrus fruit:						
Apples, fresh 2/	0.357	0.312	0.349	0.349	-2.2	11.9
Grapes, fresh 2/	0.235	0.315	0.380	0.365	61.7	15.9
Peaches, fresh 2/	0.328	--	0.247	--	-24.7	--
Pears, fresh 2/	0.192	0.241	0.222	0.302	15.9	25.6
Strawberries, fresh	0.750	1.080	0.733	0.791	-2.3	-26.8

1/ Equivalent on-tree price.
2/ Equivalent packinghouse-door returns for CA, NY (apples only), OR (pears only), and WA (apples, peaches, and pears). Prices as sold for other States.
Source: USDA, National Agricultural Statistics Service, *Agricultural Prices*.

Consumer Price Index for Fresh Fruit Continue Lower Than Last Year

The U.S. consumer price index (CPI) for fresh fruit rose 1 percent this October from September, to 317.8 (1982-84=100) (fig. 2). Relative to the October 2009 CPI, however, the October 2010 CPI declined 2 percent due to decreases in retail prices for Thompson seedless grapes, bananas, strawberries, and grapefruit. These price declines were not offset by retail price increases for Red Delicious apples, oranges, and lemons.

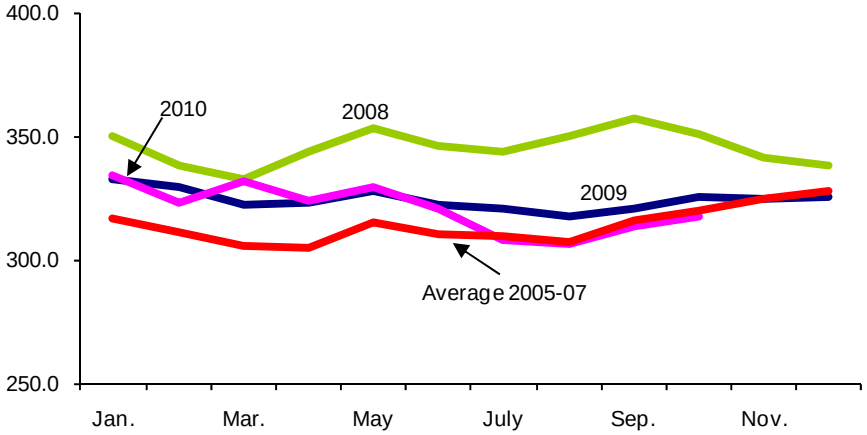
Consumers paid higher prices at retail in October over the same time last year for navel oranges and lemons. Fresh lemon retail prices increased from $1.63 in October 2009 to $1.76 in October 2010, almost an 8 percent increase (table 2). Navel orange retail prices are slightly up due to weather-caused harvest delays that had tightened supplies even more at the end of the season, pushing prices up 2 percent from last October when prices were elevated for the same reason.

Red Delicious apples maintained higher retail prices due to low ending stocks, finishing at $1.18 per pound. Increased imports are driving down banana retail prices.

Figure 2

Consumer Price Index for fresh fruit

1982-84=100



Source: U.S. Dept. of Labor, Bureau of Labor Statistics, (http://www.bls.gov/data/home.htm).

Table 2--U.S. monthly retail prices, selected fruit, 2009-10

		2009		2010		2009-10 change	
Commodity	Unit	September	October	September	October	September	October
		--- *Dollars* ---		--- *Dollars* ---		--- *Percent* ---	
Fresh:							
Valencia oranges	pound	1.006	--	1.017	--	1.1	--
Navel oranges	pound	1.255	1.262	1.302	1.281	3.7	1.5
Grapefruit	pound	1.021	1.025	1.002	1.018	-1.9	-0.7
Lemons	pound	1.664	1.634	1.719	1.757	3.3	7.5
Red Delicious apples	pound	1.212	1.129	1.259	1.180	3.9	4.5
Bananas	pound	0.605	0.598	0.573	0.580	-5.3	-3.0
Peaches	pound	1.570	--	1.591	--	1.3	--
Anjou pears	pound	--	--	--	--	--	--
Strawberries 1/	12-oz. pint	1.877	2.102	1.896	2.095	1.0	-0.3
Thompson seedless grapes	pound	1.638	2.009	1.622	1.805	-1.0	-10.2
Processed:							
Orange juice, concentrate 2/	16 fl oz	2.522	2.530	2.463	2.461	-2.3	-2.7
Wine	liter	8.917	12.179	8.304	10.382	-6.9	-14.8

-- Insufficient marketing to establish price.
1/ Dry pint.
2/ Data converted from 12-fluid-ounce containers.
Source: U.S. Dept. of Labor, Bureau of Labor Statistics (http://www.bls.gov/data/home.htm).

U.S. Citrus Production Forecast Up 9 Percent in 2010/11

USDA's National Agricultural Statistics Service (NASS) forecasts 2010/11 U.S. citrus production at 11.9 million tons, up 9 percent from last season and virtually the same as 2 seasons ago. Production of all citrus crops is forecast higher than last year, except grapefruit. Citrus production in Florida, led by a strong gain in Valencia production compared to last year's weather-impacted season, is forecast at 7.7 million tons, 8 percent higher than 2009/10, with grapefruit the only crop facing a slight decline. California's early, mid-season, and navel orange crops appear poised for a second successive large increase, and combined with smaller gains for other citrus crops, total California citrus production is projected at 3.8 million tons in 2010/11—12 percent above the previous year. Citrus production in Texas is expected to be similar to last year, about 0.3 million tons, with slightly lower grapefruit production offsetting a small gain to the orange crop.

California's Orange Crop Up in 2010/11

NASS forecast California's orange crop at 2.4 million tons, up 14 percent from last season and nearly 39 percent above 2008/09 (table 3). Both the navel and Valencia orange crops are forecast higher this season, with navels accounting for 77 percent of production. If realized, the navel crop of 1.86 million tons would exceed the record output of 1.76 million tons in 2005/06, while the Valencia crop of 560,000 tons is below average for the decade.

Although navel-bearing acreage of 133,500 was down 1,000 acres from the previous season, a cool wet spring and a cool summer contributed to a larger-than-average fruit set growth. Survey data indicated an average fruit set per tree of 418, well above the 5-year average of 348, and a large improvement from last season's 294. Fruit size is reported to be smaller than average, but orange growers

Table 3--Oranges: Utilized production, 2007/08-2009/10 and forecast for 2010/11 1/

Crop and State	Utilized			Forecast 2010/11	Utilized			Forecast 2010/11
	2007/08	2008/09	2009/10	as of 10-2010	2007/08	2008/09	2009/10	as of 10-2010
	--1,000 boxes 2/--				*--1,000 short tons --*			
Oranges:								
Early/mid-season and navel 3/:								
Arizona	230	150	--	--	9	5	--	--
California	45,000	34,500	42,500	46,500	1,688	1,294	1,594	1,860
Florida	83,500	84,600	68,600	69,000	3,758	3,807	3,087	3,105
Texas	1,600	1,300	1,360	1,400	68	55	58	60
Total	130,330	120,550	112,460	116,900	5,523	5,161	4,739	5,025
Valencia:								
Arizona	150	100	--	--	6	4	--	--
California	17,000	12,000	14,000	14,000	638	450	525	560
Florida	86,700	77,900	65,000	77,000	3,902	3,506	2,925	3,465
Texas	196	159	275	290	8	7	12	12
Total	104,046	90,159	79,275	91,290	4,554	3,967	3,462	4,037
All oranges	234,376	210,709	191,735	208,190	10,077	9,128	8,201	9,062

-- = Data not available.
1/ The crop year begins with bloom of the first year shown and ends with completion of harvest the following year.
2/ Net pounds per box: Arizona and California--75 prior to 2010/11, 80 thereafter, Florida--90, and Texas--85.
3/ Navel and miscellaneous varieties in California and Arizona, and early- and mid-season (including Navel) varieties in Florida and Texas. A small quantity of tangerines is also included in Texas' data.
Source: USDA, National Agricultural Statistics Service, *Crop Production Report.*

continue to plant trees more densely on newer acreage, with the average number of trees per acre climbing to 133 in 2010, up from 121 during most of the 1990s.

As with last season, California's navel orange harvest is expected to begin later than normal, and size is expected to be smaller than average, but the overall quality is reported to be good. USDA's Agricultural Marketing Service (AMS) shipment data show California's shipments to be light as of the first week of November this season and lower compared with the same time last season. The data also reports that import shipments from Australia have continued into early November, although at a reduced pace from last year, while shipments from Chile have virtually ceased. These two countries provide most of the summer/early fall navels in the U.S. fresh market. With navel imports mostly finished for the season, California's navels will be positioned well in the marketplace when harvesting gets into full swing.

Fresh Orange Prices Likely To Face Downward Pressure This Season

Despite reports of good quality, the larger expected crop and potentially smaller fruit size this season may place downward pressure on grower prices for fresh oranges this season. The delay in harvesting, resulting in fewer fruit available at the start of the season, could bring a price spike for fresh oranges in the market in November. As the season progresses, prices will likely moderate somewhat as harvest hits full swing. Overall, ERS anticipates that grower prices will average somewhat lower than last season, but remaining higher than the average for most of the decade, excluding 2006/07 when supplies were limited and prices soared due to a freeze-damaged crop. Much of the price outlook depends on export demand which, in 2009/10, was the strongest dating back to 1969/70. U.S. fresh orange exports in 2009/10 are estimated at 1.47 billion pounds, and ERS projects continued export strength in 2010/11 with a forecast of 1.6 billion pounds. Domestic fresh orange consumption is forecast by ERS to total 3.23 billion pounds in 2010/11, up from 2.97 billion pounds in 2009/10. If realized, per capita consumption would reach 10.3 pounds, the first time it would exceed 10 pounds since 2005/06.

Florida's Orange Output Expected to Improve in 2010/11

Florida's orange production, 95 percent of which is used to make juice, is forecast at 6.6 million tons, a 9-percent increase from last season but 10 percent lower than 2008/09. Early, midseason, and navel varieties in Florida are forecast at 3.11 million tons, 1 percent higher than last season. The Valencia orange crop, forecast at 3.47 million tons, is up 18 percent from the 2009/10 crop. In September, the USDA NASS *Commercial Citrus Inventory Preliminary Report* indicated that orange acreage in Florida declined for the sixth consecutive year to 483,418 acres, the lowest since 1986. Ideal conditions during the bloom period resulted in a heavy fruit set, but the November *Citrus Maturity Test Results and Fruit Size* report indicated fruit sizes smaller than the previous season.

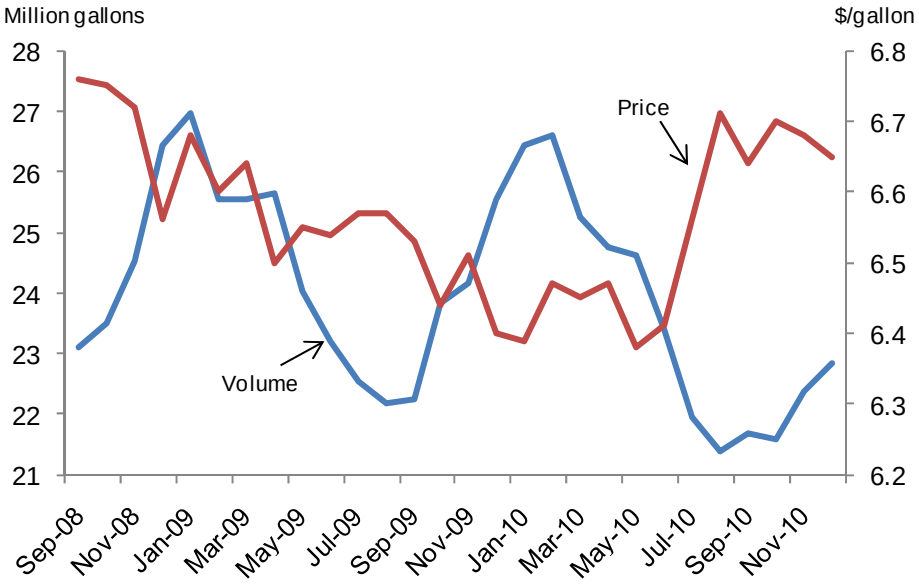
Since so much of Florida's orange crop is used to make juice, grower prices will be determined primarily by the supply and demand situation for orange juice. Adequate beginning stocks of orange juice and higher production of oranges available for processing will keep the orange juice market well supplied this year, while domestic consumption is likely to continue to wane, consistent with the long term trend. Entering the 2010/11 season, orange juice stocks, at 558 million single-

strength-equivalent (sse) gallons, are down 20 percent from the previous season, but about average for the past 5 years. The combination of adequate stocks, weaker domestic consumption, and increased availability of oranges for processing is expected to limit any price gains compared to last season. According to the Florida Department of Citrus (*Florida Citrus Outlook 2010-11 Season*, October 20, 2010), the mid-range of average processed on-tree price for early and midseason and Valencia oranges are expected to be about $1.50 per box higher than in 2009/10. Early and midseason oranges were estimated at $6.98 per box and $8.68 for Valencias.

U.S. Orange Juice Production Forecast Up for 2010/11

As a result of this season's larger Florida orange crop, USDA's Economic Research Service forecasts this year's orange juice production at 949 single-strength equivalent (sse) gallons, up 13 percent from last season's 2 decade low of 838 million gallons (table 4). However, lower beginning stocks than the previous year and a projected decline in imports are expected to keep overall supplies about 4 percent below last season, or just under 1.8 billion gallons. With a still generally weak U.S. dollar, and reports of production problems in Brazil, U.S. exports are projected to climb further this year to 165 million gallons, up from 147 million gallons in 2009/10, and potentially the second highest on record. Along with increased domestic production, these same factors are expected to dampen imports, which are forecast at 280 million gallons, or 48 million gallons lower than in 2009/10. Domestic consumption is projected to decline 3.7 percent to 1.11 billion gallons, consistent with weak retail sales data and rising prices for not-from-concentrate (NFC) orange juice reported by the Florida Department of Citrus (fig. 3).

Figure 3
Not-from-concentrate orange juice sales dip as prices rise



Nielsen sales data, refrigerated not-from-concentrate Orange Juice.
Source: compiled by USDA, Economic Research Service from Florida Department of Citrus.

Table 4--United States: Orange juice supply and utilization, 1990/91 to date

Season 1/	Beginning stocks	Production	Imports	Supply	Exports	Domestic consumption	Ending stocks 2/	Per capita consumption
	----------	----------	----------	*Million sse gallons 3/*	----------	----------	----------	*Gallons*
1990/91	225	876	320	1,422	94	1,170	158	4.6
1991/92	158	930	286	1,374	107	1,096	170	4.3
1992/93	170	1,207	324	1,701	114	1,337	249	5.2
1993/94	249	1,133	405	1,787	107	1,320	360	5.0
1994/95	360	1,257	198	1,815	117	1,264	434	4.8
1995/96	434	1,271	261	1,967	119	1,431	417	5.3
1996/97	417	1,437	256	2,110	148	1,398	564	5.2
1997/98	564	1,555	281	2,400	150	1,571	679	5.7
1998/99	679	1,236	350	2,265	147	1,585	534	5.7
1999/00	534	1,493	339	2,366	146	1,575	645	5.6
2000/01	645	1,387	258	2,291	123	1,470	698	5.2
2001/02	698	1,433	189	2,321	181	1,447	692	5.0
2002/03	692	1,250	291	2,233	103	1,426	705	4.9
2003/04	705	1,467	222	2,393	123	1,448	822	5.0
2004/05	822	974	358	2,153	119	1,411	623	4.8
2005/06	623	986	299	1,909	138	1,312	459	4.4
2006/07	459	889	399	1,747	123	1,248	376	4.2
2007/08	376	1,156	406	1,938	136	1,155	647	3.8
2008/09	647	1,060	317	2,025	125	1,206	694	3.9
2009/10	694	837	328	1,859	147	1,155	558	3.7
2010/11 f/	558	949	280	1,787	165	1,112	510	3.6

f = forecast.

1/ Season begins in December of the first year shown. As of 1998/99, season begins the first week of October.

2/ Data may not add due to rounding. Beginning with 1994/95, stock data include chilled as well as canned and frozen concentrate juice. 3/ SSE = single-strength equivalent.

Source: USDA, Economic Research Service.

World Orange Juice Supplies Expected Tight This Season

World orange juice supplies are comprised mostly of Brazilian and U.S. production. According to USDA's Foreign Agricultural Service's (FAS) *Production, Supply, and Distribution* database, Brazil accounts for about one-third of the world orange juice production, but it accounts for about 85 percent of the export market. The United States, while producing about the same amount of orange juice as Brazil, markets most of its juice domestically and is a small player in the international market, except for not-from-concentrate orange juice (NFC), in which the U.S. industry is a lead player.

According to data last released by FAS in July, Brazil's orange juice production in 2010/11 is forecast up nearly 4 percent from last season's 6-year low of 1.78 billion gallons, sse (table 5). However, beginning stocks this season are projected to be 35 percent lower than in 2009/10, and more recent reports indicate that orange juice production in Brazil is not likely to meet the projections made by FAS this summer (table 5 does not reflect these potential changes). In particular, a drought in the State of Sao Paolo, which accounted for more than three-quarters of Brazilian production last year, is expected to drive Brazilian orange juice production down as much as much as 10 percent this year, according to the *Florida Citrus Outlook 2010-11 Season* report (Florida Department of Citrus, October 20, 2010). With lower beginning stocks and reduced orange juice production, supplies are expected to be tight and Brazilian exports are likely to decline from the 2009/10 season. The more recent information on Brazil's production and export prospects contributed to ERS's forecast for reduced U.S. orange juice imports and for continued strength in U.S. exports (table 5).

Table 5--Brazilian orange juice production and utilization, 1991-2010

Season 1/	Beginning stocks	Production	Domestic consumption	Exports	Ending stocks 2/
			--Million sse gallons 3/--		
1991	177	1,334	25	1,390	96
1992	96	1,610	25	1,532	148
1993	148	1,572	25	1,546	148
1994	148	1,583	31	1,482	218
1995	218	1,525	25	1,476	242
1996	242	1,620	24	1,660	177
1997	177	1,954	22	1,778	331
1998	331	1,712	26	1,600	418
1999	418	1,912	22	1,821	486
2000	486	1,683	21	1,778	370
2001	370	1,375	21	1,511	212
2002	212	1,904	21	1,757	337
2003	337	1,618	25	1,852	79
2004	79	2,084	28	1,992	142
2005	142	1,807	32	1,877	25
2006	25	2,024	39	1,989	21
2007	21	2,061	43	1,808	231
2008	231	1,831	47	1,776	240
2009	240	1,783	47	1,817	157
2010	157	1,852	49	1,838	123

f = forecast. 1/ Season begins in July. 2/ Data may not add due to rounding.
3/ SSE = single-strength equivalent. To convert to metric tons at 65 degrees brix, divide by 140588. Beginning in 2007, divide by 13926.
Source: USDA, Foreign Agricultural Service, *Brazil Citrus Semi Annual* reports.

U.S. Grapefruit Production Forecast Down for Fourth Consecutive Year

NASS forecast the U.S. 2010/11 grapefruit crop at 1.2 million tons, down less than 1 percent from last season but the fourth consecutive season of declining production, and the second lowest level dating back to 1980 (table 6). If realized, this season's crop would be the smallest since the 2004/05 when Florida's hurricane reduced crop drove U.S. grapefruit production to a record low since the 1970's. Florida's crop accounts for 70 percent of total U.S. grapefruit production, with Texas and California producing the remainder. Prior to the hurricanes of 2004/05 and 2005/06, Florida's production averaged about 80 percent of the U.S. total.

Florida's grapefruit crop is forecast to reach 850,000 tons, 2 percent lower than last season. Grapefruit acreage in Florida fell by an estimated 7 percent in 2010 to just over 50,000 acres, but a larger average fruit size kept production close to last year's level. Acreage was down in all production areas, including a 3,000 acre decline in the Indian River, the State's largest production region.

Shipments began slowly this season, with Florida's Citrus Administrative Committee (FCAC) reporting about 30-40 percent fewer shipments, season to date (through November 14th), than either of the previous two seasons. Shipments have been down so far to both domestic and export markets. Due to the lack of available

Table 6--Grapefruit: Utilized production, 2007/08-2009/10 and indicated 2010/11 1/

Crop and State	Utilized 2007/08	Utilized 2008/09	Utilized 2009/10	Forecast for 2010/11 as of 10-2010	Utilized 2007/08	Utilized 2008/09	Utilized 2009/10	Forecast for 2010/11 as of 10-2010
	--1,000 boxes 2/--				--1,000 short tons--			
Florida, all	26,600	21,700	20,300	20,000	1,131	922	863	850
Colored	17,600	15,100	14,300	14,000	748	642	608	595
White	9,000	6,600	6,000	6,000	383	281	255	255
Arizona	100	25	3/	3/	3	1	3/	3/
California	5,200	4,800	4,200	3,800	174	161	141	152
Texas	6,000	5,500	5,600	5,500	240	220	224	220
Total	37,900	32,025	30,100	29,300	1,548	1,304	1,228	1,222

1/ The crop year begins with bloom of the first year shown and ends with completion of harvest the following year.
2/ Net pounds per box: California and Arizona-67 prior to 2010/11, 80 thereafter, Florida-85, and Texas-80.
3/ Estimtes discontinued beginning with the 2009/10 crop year.
Source: USDA, National Agricultural Statistics Service, *Crop Production Report.*

fruit early in the season, the FCAC is reporting free-on-board (f.o.b.) prices for both white and red seedless grapefruit of just under $15 per 4/5 bushel box. This is similar to last year, but about $3 per bushel higher than 2008/09, season-to-date. Prices are likely to remain similar to last year based on reports of good quality and the potential for strong exports to Japan—the leading market for Florida's fresh grapefruit—due to its strengthening currency.

Texas' fresh grapefruit crop is forecast down 2 percent this season from last, with an expected crop of 220,000 tons. According to AMS shipment data, as of November 13, Texas' grapefruit shipments were about 78 percent of the quantity shipped during the same period last season, with both domestic shipments and exports down.

Grapefruit Juice Supplies Forecast About the Same as Last Season

With Florida's grapefruit production forecast just slightly lower than last season, ERS forecasts 2010/11 grapefruit juice production at 79 million sse gallons, about 3 percent above last season (table 7). The forecast is based on recent historic data showing a slightly higher average share of Florida's grapefruit crop being utilized for processing in recent seasons than in the past (about 43 percent in the last 3 years compared to 41 percent earlier in the decade). Total supplies are forecast about the same as last year, at 125 million sse gallons, the second lowest quantity dating back to 1990. Coming into this season, juice stocks were lower than last season but this is roughly offset by the expectation of slightly higher production. On the use side, slightly higher exports may offset a continued decline in domestic consumption, and ERS forecasts per capita grapefruit juice consumption to decline only slightly to 0.21 gallons per person. If realized, this would be the second lowest in the past 30 years.

Table 7--U.S. grapefruit juice: Supply and utilization, 1990/91 to date

Season 1/	Supply				Utilization			
			Beginning		Ending		Consumption	
	Production	Imports	stocks 2/	Total supply	stocks	Exports 3/	Total	Per capita
	-- Million gallons, single-strength equivalent --							*Gallons*
1990/91	129.0	1.5	62.6	193.1	45.1	16.4	131.6	0.52
1991/92	119.5	4.2	45.1	168.9	42.1	23.2	103.6	0.40
1992/93	186.3	1.9	42.1	230.4	74.3	22.0	134.0	0.52
1993/94	168.5	0.9	74.3	243.7	63.6	17.4	162.7	0.62
1994/95	190.8	0.9	63.6	255.2	76.2	22.1	157.0	0.59
1995/96	171.5	0.5	76.2	248.2	69.4	26.8	152.0	0.56
1996/97	192.0	0.2	69.4	261.5	89.6	21.3	150.7	0.55
1997/98	166.0	0.2	89.6	255.8	67.8	18.1	166.7	0.60
1998/99	170.9	1.3	67.8	240.0	54.3	25.3	160.3	0.57
1999/2000	203.4	4.1	54.3	262.7	81.9	32.6	147.8	0.52
2000/01	184.9	0.9	81.9	267.7	74.8	39.0	153.9	0.54
2001/02	180.4	0.3	74.8	255.5	83.6	36.3	135.7	0.47
2002/03	141.6	0.4	83.6	225.6	71.7	38.3	115.6	0.40
2003/04	147.8	0.5	71.7	220.0	65.5	42.3	112.2	0.38
2004/05	50.7	11.5	65.5	127.6	35.5	23.9	68.2	0.23
2005/06	80.8	5.6	35.5	121.9	42.0	18.7	61.2	0.20
2006/07	121.4	0.9	42.0	164.4	57.9	20.2	86.3	0.29
2007/08	109.2	0.3	57.9	167.4	59.8	16.1	91.6	0.30
2008/09	83.6	0.5	59.8	143.9	48.2	15.6	80.1	0.26
2009/10	76.9	0.6	48.2	125.7	44.9	12.8	68.0	0.22
2010/11 f/	79.4	0.5	44.9	124.9	45.0	15.0	64.9	0.21

1/ As of 1998/99, season begins in October. Previously, it began in December.
2/ Stock data were adjusted beginning with 1989/90 ending stock data to more accurately reflect Florida inventories. 3/ Exports include shipments to territories until 1986/87. f/ = forecast.
Source: USDA, Economic Research Service calculations.

U.S. Lemon Crop Forecast Up Nearly 10 Percent in 2010/11

NASS forecast the 2010/11 U.S. lemon crop at 948,000 tons, 10 percent higher than the 2009/10 crop, which was considered average for the decade (table 8). California's production, forecast at 840,000 tons, would be 8 percent above last season. Arizona's crop, at 108,000 tons, would be 29 percent higher than 2009/10 if realized. AMS shipment data show total lemon shipments to be about 14 percent lower this season through November 14 than the same time last season. At the same time, total lemon imports are down slightly, about 3 percent, for the season but were comparatively strong in the most recent 2 weeks compared to last season. Despite the large crop, prices for all lemons have started off the first few months of the season relatively strong compared to last year but prices are expected to come down in the ensuing months due to ample supplies.

Table 8--Lemons: Utilized production, 2007/08-2009/10 and forecast for 2010/11 1/

State	Utilized			Forecast for 2010/11 as of 10-2010 2/	Utilized			Forecast for 2010/11 as of 10-2010
	2007/08	2008/09	2009/10		2007/08	2008/09	2009/10	
	---1,000 (76-lb) boxes---			--1,000 (80-lb) boxes---	*---1,000 short tons---*			
Arizona	1,500	3,000	2,200	2,700	57	114	84	108
California	14,800	21,000	20,500	21,000	562	798	779	840
Total	16,300	24,000	22,700	23,700	619	912	863	948

1/ The crop year begins with bloom of the first year shown and ends with completion of harvest the following year.
2/ 76 pound boxes prior to 2010/11, 80 pounds thereafter.
Source: USDA, National Agricultural Statistics Service, *Crop Production Report.*

Tangerine/Mandarin Production Forecast Climbs 5 Percent in 2010/11

Tangerine and mandarin production is forecast to reach 626,000 tons for the 2010/11 season, 5 percent more than last season, and 41 percent greater than 2 seasons ago (table 9). California's production is forecast to increase 8 percent to 400,000 tons, while Florida's is expected to rise 1 percent to 214,000 tons. Arizona's crop is expected to decline slightly to 12,000 tons.

For the 2010/11 season, NASS' California field office reports that there are 33,000 acres of tangerine/mandarin trees bearing commercial crops in 2010/11, up 3,000 acres from last season. NASS' Florida field office reports there has been a decrease in the number of bearing trees for all of Florida's major tangerine varieties (Fallglo, Sunburst, and Honey)—down about 2,000 acres to 20,430 acres, but the estimated fruit set per tree increased for all varieties except the Honey tangerine. Fruit size is smaller than last year for Fallglo and Sunburst Tangerines. Florida's tangelo production (which is counted separately in Florida but included with the tangerine/mandarin forecast in California) is forecast up 22 percent this year to 50,000 tons.

As of the end of October, the first month of Florida's tangerine season, the Florida Department of Citrus reported that shipments were up 1 percent over the same time last season, with a similar increase in revenues— indicating stable prices. More recent AMS shipment data show Florida tangerine shipments down about 4 percent compared to last year, season-to-date through mid-November, with about 17 percent of early tangerines having been harvested. F.O.B prices for Florida Sunburst and Fallglo varieties are averaging just slightly higher than last season according to the Florida Citrus Mutual, at $18.76 and $13.70 per 4/5 bushel box, respectively. But based on expectations of lower total on-tree revenues for Florida tangerines this year, grower prices are expected to decline somewhat in the coming months (*Florida Citrus Outlook 2010-11*, October 20, 2010).

In California, fresh tangerine/mandarin prices are likely to remain strong as its industry continues to grow and its markets continue to expand. Consumers have shown strong preferences for mandarin varieties due to their lack of seeds and

Table 9--Other citrus: Utilized production, 2007/08-2009/10 and forecast for 2010/11 1/

Crop and State	Utilized			Forecast for 2010/11 as of 10-2010	Utilized			Forecast for 2010/11 as of 10-2010
	2007/08	2008/09	2009/10		2007/08	2008/09	2009/10	
	1,000 boxes 2/				*1,000 short tons*			
Tangelos:								
Florida	1,500	1,150	900	1,100	68	52	41	50
Tangerines:								
Arizona	400	250	350	300	15	9	13	12
California	6,700	6,700	9,900	10,000	251	251	371	400
Florida	5,500	3,850	4,450	4,500	261	183	211	214
Total	12,600	10,800	14,700	14,800	527	443	595	626

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

2/ Net pound per box: tangerines--California and Arizona--75 prior to 2010/11, 80 thereafter; Florida--95; tangelos--90;

Source: USDA, National Agricultural Statistics Service, *Crop Production Report*.

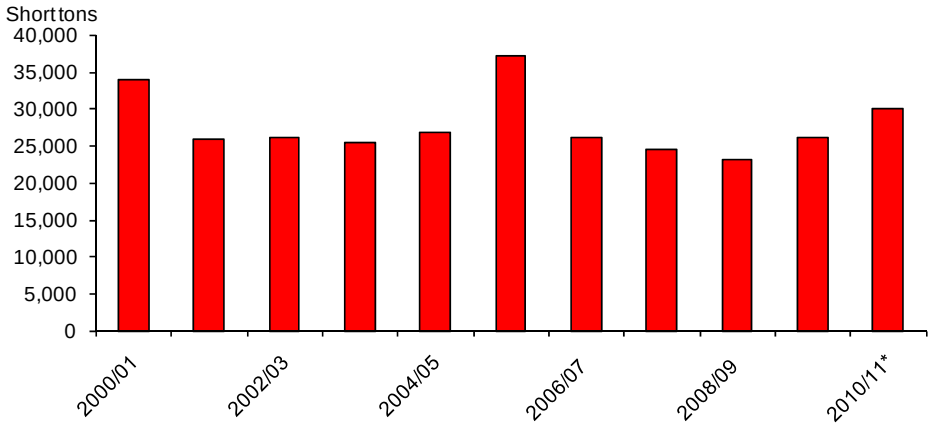
ease of peeling and eating. These easy peel varieties have been popular on the East Coast and Midwestern States for awhile now, almost all imported, and their popularity has remained quite strong.

2010 Kiwifruit Production in California Potentially Higher

While this year's cold and wet spring led to delays and reduced production of several fruit crops, California's 2010 kiwifruit crop is poised to be larger than a year ago, thanks to mild temperatures during the fruit-growing period that aided fruit size. Estimates from the California Kiwifruit Commission (CKC) put crop volume for the 2010/11 marketing season at around 7.5 million to 8.0 million trays, about 1.0 million trays over last season or a 15-percent increase. In 2009/10, NASS reported production at 26,000 tons or 52 million pounds. Based on this NASS figure, a 15-percent increase would bring production to around 30,000 tons in 2010/11. If realized, this will be a second straight year of increased production for the industry and although crop volume will not be a record-breaker, it will be higher than the average crop size over the past decade (fig. 4). The only time NASS reported production going over this projected volume during the past decade was in 2000/01, at 34,000 tons, and in 2005/06, at 37,000 tons. Record production was reported by NASS in 1992/93 at 52,300 tons. NASS will release its first estimate for the 2010/11 California kiwifruit crop in January 2011.

Despite the higher production, the market for California kiwifruit during the 2010/11 marketing season will likely remain fairly strong as the industry expects harvest schedules to fall near normal timing with the crop producing excellent quality and larger fruit size. During the previous season (2009/10), fruit were uniformly shaped, free of blemish, and generally larger in size than fruit produced in 2008/09, boosting both domestic and international demand and pricing of the crop. At $1,470 per ton in 2009/10, grower prices for California kiwifruit averaged 66 percent higher than in 2008/09 despite an increase in overall supplies (domestic production and imports).

Figure 4
This season's kiwifruit production in California above the past 10-year average



* USDA, Economic Research Service projection.
Source: USDA, National Agricultural Statistics Service, *Noncitrus Fruit and Nuts Summary*, various issues.

Based on AMS data, cumulative shipments of California kiwifruit for the current season through early November lagged in volume from those of the previous season for the same period by 58 percent. While a few growers started harvest in early October most held off until fruit sugar contents were at the required harvest level. As a result, California supplies did not show adequate volumes until around mid-October. Lingering supplies arriving from Chile and New Zealand during the first few weeks in October were larger compared with the same period last year, but California kiwifruit prices held almost nearly the same as last year's. Free-on-board (f.o.b.) shipping-point prices for California kiwifruit in the Central and Northern San Joaquin Valley opened for the 2010/11 season during the week ending October 30, with those in the size 27 category ranging from $15.10 to $16.10 per 9-kilogram (or 19.8 pounds) container loose of the Hayward variety. Opening prices for size 27's during the previous season (2009/10) were reported higher at $16.1-$17.3 on the week ending October 17, 2009 but prices by the end of the month had moved closer to this season's opening prices at around $15.5-$16.5. This season's opening f.o.b. prices for size 30's and 33's ranged from $14.8-$15.1 per 9 kilogram container loose, Hayward variety. Last year the same time, f.o.b. shipping-point prices in this size range were reported at around $14.1-$15.5.

With harvesting continuing through November, California supplies are expected to continue to build up, putting downward pressure on prices from earlier in the season and from a year ago. As of the first two weeks in November, prices for California kiwifruit in the size 27 classification already had slipped from earlier in the season, ranging from $14.5 to $16.1 per 9-kilogram container loose. Last year around the same time, prices were in the range of $14.1 to $16.50.

California's kiwifruit production represents about one-third of all the fresh kiwifruit supplies in the country during the season. A majority of the supplies come from imports, with Chile, New Zealand, and Italy leading the way. Higher imports and an increase in domestic production boosted the year-round availability of fresh kiwifruit in the U.S. market during the 2009/10 season compared with the previous season, helping to support both export and domestic demand. Estimated at 0.5 pound per person, U.S. fresh kiwifruit consumption in 2009/10 was higher than the per capita estimates during 2001/02 to 2008/09 and nearing the more-than-half-a-pound levels achieved through most of the 1990's.

Import volume during the 2009/10 season, October through September, rose 7 percent from the previous season to a record 123.6 million pounds. Imports from Chile continued to top all other foreign kiwifruit shipments to the United States in 2009/10, accounting for more than one third of total import volume and increasing 10 percent from the previous season. Imports from New Zealand also posted a gain (up 12 percent) while those from Italy declined by almost 2 percent. The combined import volume from these top sources made up nearly all of the imported kiwifruit in the United States last season. Most imports from Chile and New Zealand enter the U.S. market around the spring and summer months — the low period for California supplies. Supplies from Italy, however, overlap mostly with California's. Some reports cited that Italian supplies are also leaning more on large-size fruit this season but problems with bacterial canker may curtail production volume. A significant drop in Italy's production could hamper export prospects to the United States for this season. New Zealand's kiwifruit industry could be facing a similar threat as a bacterial vine disease of an unknown strain was recently confirmed to

have infested three kiwifruit orchards in the northern part of the country and left two other orchards under quarantine.

The international marketing of U.S. fresh kiwifruit reached a total of 16 countries across the world during the 2009/10 season, with total export volume posting a gain of 5 percent over the previous season to 14.6 million pounds, valued at close to $12 million. Mexico continued to be the No. 1 export market for U.S. kiwifruit for a second straight year, surpassing Canada again—historically the leading market. Export volume to Mexico increased 8 percent and those from Canada rose by 12 percent. Exports to top markets in Asia—Taiwan and Japan—were both down significantly. For the current season, the projected increased production in California together with the crop's exceptional quality provides for the likely possibility of another strong season for U.S. kiwifruit exports in 2010/11. The industry has plenty of large-size fruit to move this season, a desirable attribute in some export markets including Mexico.

2010/11 Avocado Supplies in the U.S. Market Likely Lower

Sourcing of avocados in the U.S. market this fall through mid-spring will come mostly from imports. California's 2009/10 avocado season has ended and harvest for the 2010/11 marketing season resumes in the spring. Until then, Mexican avocados will be dominating the domestic market for this product, specifically the Hass avocado variety. Other avocado-producing States—Florida and Hawaii—generally produce varieties other than the Hass and their production volumes are relatively small. Mexico is the No.1 source for imported avocados in the United States, shipping year round almost three-quarters of total import volume in the United States in recent years. Chile, once the largest supplier to the United States, now account for almost a one-third share of total import volume, shipping from June through April.

As of this summer, avocado imports in the United States had dropped, reflecting lower shipments from both Mexico and Chile. Represented by relatively smaller volumes, shipments from the Dominican Republic also had fallen while Peru had made inroads in this market. Total July-September import volume declined 56 percent from those of the same period a year ago. Imports from Mexico during this 3-month period declined 20 percent, influenced heavily by an abundance of medium-size avocados from California and partly by lower-than-expected production in Mexico. Harvested this spring and summer, the 2009/10 California avocado crop ranked the second-largest over the past decade, totaling 245,000 tons. Last season's crop was the fourth largest in the history of California avocado production. The all-time high of 300,000 tons was harvested during the 2005/06 season. Just coming off a huge crop last season, production in California could potentially be reduced for the 2010/11 season.

According to the Avocado Producers and Exporting Packers Association of Michoacán, summer production in Mexico (which matured from the first of four bloom sets for the year) was below average. Unfavorable weather over the winter had an impact on the blooms and although production in Mexico is expected to increase during the fall and into the winter months, overall supplies could be down from last season. Chilean avocado shipments to the United States also have been down since this summer, with the volume from July through September falling by as much as 91 percent from those of the same time a year ago. Limited supplies in

Chile will continue to hamper U.S. imports of Chilean avocados for the remaining months of that country's 2010/11 shipping season. The Chilean Avocado Importers Association has cited cold weather during the growing season, an "off-year" in the alternate-bearing cycle of the crop, and currency exchange rates that are pointing to Europe as a more attractive market outlet for Chilean avocado exports as contributing to the Chile's lower shipments to the United States this season. With avocado consumption in the United States reaching an estimated over 4.0 pounds per person for the first time in 2009/10 and still expected to continue to grow, tighter supplies for this season will likely result in higher 2010/11 avocado prices. AMS data report that in October, avocado retail advertised prices in the United States averaged $1.11 each, up 2 percent from the average in October 2009. As of early November, prices continued even much higher than last season, increasing by as much as 15 percent.

Blueberry Supplies Plentiful This Winter

Far different from the past, buying fresh blueberries in the United States around this time of the year and through the winter is now made possible by increased imports from Southern Hemisphere producers, primarily Chile and Argentina. Most of the blueberries from Argentina enter the U.S. market during the fall months while supplies from Chile, although partly overlapping with Argentina's late season, peak around January and February. Early reports from industry indicate that U.S. blueberry import volumes are expected to increase from both these countries for this shipping season, providing ample promotional supplies for retailers especially by early next year when Chile is expected to have a heavy presence. Based on AMS shipment data, cumulative import volume from Argentina from early October through the second week of November was 25 percent larger than the same time last year. At the start of the season around the second week in October, free-on-board (f.o.b.) shipping-point prices for Argentine blueberries entering through Miami International Airport ranged from $38-$42 per flat of 12, 4.4-oz cups with lids (medium-large). With increasing supplies, prices by month's end had weakened to $16-$18 and further declined to $12-$15 by the second week in November. Late October f.o.b. prices last year were higher at $26-$32 per flat and $20-$24 in early November due to lower-than-expected supplies caused by heavy rains during the harvest time.

At the retail level, fresh blueberry advertised prices in October averaged $3.69 per 4.4-ounce package, compared with $2.95 in October 2009, based on AMS data. With increasing supplies and with some volume coming in from Chile, prices over the first 2 weeks in November declined to $2.32, down from the previous month and down from a $2.52 average the same time last year.

A combination of favorable weather over the growing period and increased acreage has led to a significant increase in production this year in Chile. Chile is a much bigger supplier of imported fresh blueberries to the United States, shipping more than four times the volume imported from Argentina, on average, over the past 2 years. Beginning in 2007, Chile gained the rank as the No. 1 supplier of fresh blueberries to the United States, surpassing the previous leader, Canada. Over the past couple of years, Chile has supplied over half the total fresh blueberries imported in the United States. Blueberries from Canada are available here in the U.S. market during the summer when domestic production is at its peak.

With very light supplies arriving in mid-October, cumulative import volume from Chile for this season through the second week of November lagged by about 27 percent those of the same time last year. Cool weather in late September and early October slowed maturity of Chile's blueberry crop, delaying their shipping season by about a week to 10 days. Chilean supplies are expected to increase seasonally in the coming weeks, likely driving down blueberry prices this winter.

Strong Off-year Harvest for Pecans

The 2010 pecan crop is on its off-cycle, with production forecasted by NASS at 271.3 million pounds, a decrease of 7 percent from the 2009 harvest, but a 40-percent increase from 2008— the last "off-cycle" of the pecan tree's alternate-bearing nature. If realized, 2010 stands to be the largest "off-year" harvest since 1988, which had a harvest of 308.2 million pounds. Georgia remains the top producer with an estimated harvest of 75 million pounds, while Texas is estimated to produce 70 million pounds.

AMS reported by the second week of November, the pecan harvest has increased in southern Georgia on well maintained, irrigated orchards. Deliveries to the door have remained light in Georgia, Louisiana and Texas, as growers are waiting for cold temperatures to open the remaining pecans, cause nut drop, and defoliate the leaves. Georgia pecan demand is good but quality is an issue in some areas. Purchases for gift packs are very good and should increase once temperatures drop and harvesting increases.

Exports Up for Grapefruit, Lemons and Pecans

Exports of fresh fruit and tree nuts through September 2010 have increased for new crops of grapefruit, lemons, almonds and pecans compared with the same time last year (table 10). Despite the forecast reduced in domestic production, grapefruit has experienced a 3-fold increase in exports early into the 2010/11 season, with export volume in September increasing to 12.3 million pounds, from 4.9 million the same time last year. Japan is the main destination of grapefruit shipments accounting for 62 percent of September's exports, while Canada accounted for 20 percent.

Lemon exports are up 15 percent compared with this time last year. Canada and Japan are the top 2 markets for fresh lemons accounting for a combined share of 56 percent of total lemon exports through September 2010. China rounded out the top 3 with 3 million pounds shipped in the last two months.

U.S. frozen concentrate orange juice (FCOJ) has ended the 2009/10 season in September with total export volume for the season up by 45 percent compared to last season. Belgium was the number one market for U.S. FCOJ, accounting for 36 percent of total export volume. The Netherlands and Saudi Arabia represented 25 and 12 percent of the market, respectively.

U.S. exports of fresh peaches (includes nectarines) and strawberries are posting gains for this season compared to last. Peach exports were up almost 14 percent, while strawberries are close to an 8 percent increase over this time last year. Pecan exports, for the 2009/10 season ended being up 8 percent from the previous season. Hong Kong remained the number one export market for U.S. pecans, with 49 million pounds. The large harvest last year aided the increase in exports. This

Table 10--U.S. exports of selected fruit and tree nut products

Commodity	Marketing season	Season-to-date (through September) 2009	2010	Year-to-date change
		---------- *1,000 pounds* ----------		*Percent*
Fresh-market:				
Oranges	November-October	1,076,080	1,450,945	34.8
Grapefruit	September-August	4,944	12,308	148.9
Lemons	August-July	16,022	18,485	15.4
Apples	August-July	203,300	156,721	-22.9
Grapes	May-April	346,873	309,491	-10.8
Pears	July-June	65,665	56,003	-14.7
Peaches (including nectarines)	January-December	189,343	215,502	13.8
Straw berries	January-December	228,874	246,679	7.8
Cherries	January-December	141,673	128,302	-9.4
		------ *1,000 sse gallons 1/* -------		
Processed:				
Orange juice, frozen concentrate	October-September	54,076	78,141	44.5
Orange juice, not-from-concentrate	October-September	54,245	51,766	-4.6
Grapefruit juice	October-September	15,616	12,790	-18.1
Apple juice and cider	August-July	1,457	1,041	-28.6
Wine	January-December	71,316	77,210	8.3
		---------- *1,000 pounds* ----------		
Raisins	August-July	81,691	64,444	-21.1
Canned pears	June-May	3,879	5,784	49.1
Canned peaches	June-May	11,736	12,069	2.8
Frozen straw berries	January-December	22,576	23,051	2.1
		---------- *1,000 pounds* ----------		
Tree nuts:				
Almonds (shelled basis)	August-July	192,677	208,882	8.4
Walnuts (shelled basis)	September-August	9,003	4,125	-54.2
Pecans (shelled basis)	October-September	48,582	67,740	39.4
Pistachios (shelled basis)	September-August	7,719	3,313	-57.1

1/ Single-strength equivalent.

Source: U.S. trade data provided by the U.S. Department of Commerce, U.S. Census Bureau.

upcoming harvest will be similar in size, forecasted at 271 million pounds. The ample size of the 2010/11 harvest will aid in the continued strong exports of U.S. pecans.

Majority of Fresh Fruit Imports Up

Imports are up through September for many fresh fruit (table 11). Orange imports are up 14 percent mostly from South Africa, Chile and Mexico. Much of the increase can be attributed to the offseason products entering the U.S. market when major domestic supplies of fruit are not available. South Africa and Chile accounted for close to 30 percent of U.S. fresh orange imports.

Banana imports rose 18 percent over this time last year. This season has so far been clear of adverse weather conditions, so supplies are up in major banana-producing countries in Central and South America compared to last year when poor weather affected most of their production. With the increased supply and lower prices, banana imports are on the rise for the season. Guatemala remained the No. 1 supplier of fresh bananas to the United States for 2010 with 1.95 billion pounds.

Lighter supplies of apples at the beginning of the new season, resulting from lower domestic production, partly contributed to a 40-percent increase in fresh apple imports. Chile exported 25 million pounds to the United States, representing 48 percent of total U.S. apple imports. Grape imports are also up this season through September. Mexico experienced a large crop and has exported over 325 million pounds of grapes into the United States since May 2010, representing 91 percent of total U.S. grape imports.

Table 11--U.S. imports of selected fruit and tree nut products

Commodity	Marketing season	Season-to-date (through September) 2009	2010	Year-to-date change
		---------- *1,000 pounds* ----------		*Percent*
Fresh-market:				
Oranges	November-October	179,680	204,649	13.9
Tangerines (including clementines)	October-September	286,575	277,956	-3.0
Lemons	August-July	41,104	38,804	-5.6
Limes	January-December	605,411	603,697	-0.3
Apples	August-July	36,992	51,703	39.8
Grapes	May-April	261,084	358,101	37.2
Pears	July-June	6,795	6,954	2.3
Peaches (including nectarines)	January-December	101,878	97,939	-3.9
Bananas	January-December	5,852,932	6,891,114	17.7
Mangoes	January-December	530,919	621,427	17.0
		------ *1,000 sse gallons 1/* -------		
Processed:				
Orange juice, frozen concentrate	October-September	316,071	327,066	3.5
Apple juice and cider	August-July	534,774	541,128	1.2
Wine	January-December	173,419	177,003	2.1
		---------- *1,000 pounds* ----------		
Canned pears	June-May	16,234	19,280	18.8
Canned peaches (including nectarines)	June-May	42,483	54,849	29.1
Canned pineapple	January-December	574,303	534,576	-6.9
Frozen strawberries	January-December	154,623	162,946	5.4
		---------- *1,000 pounds* ----------		
Tree nuts:				
Brazil nuts (shelled basis)	January-December	15,876	17,547	10.5
Cashews (shelled basis)	January-December	196,296	200,984	2.4
Pine nuts (shelled basis)	January-December	4,996	1,892	-62.1
Pecans (shelled basis)	October-September	37,837	38,331	1.3

1/ Single-strength equivalent.
Source: U.S. trade data provided by the U.S. Department of Commerce, U.S. Census Bureau.

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