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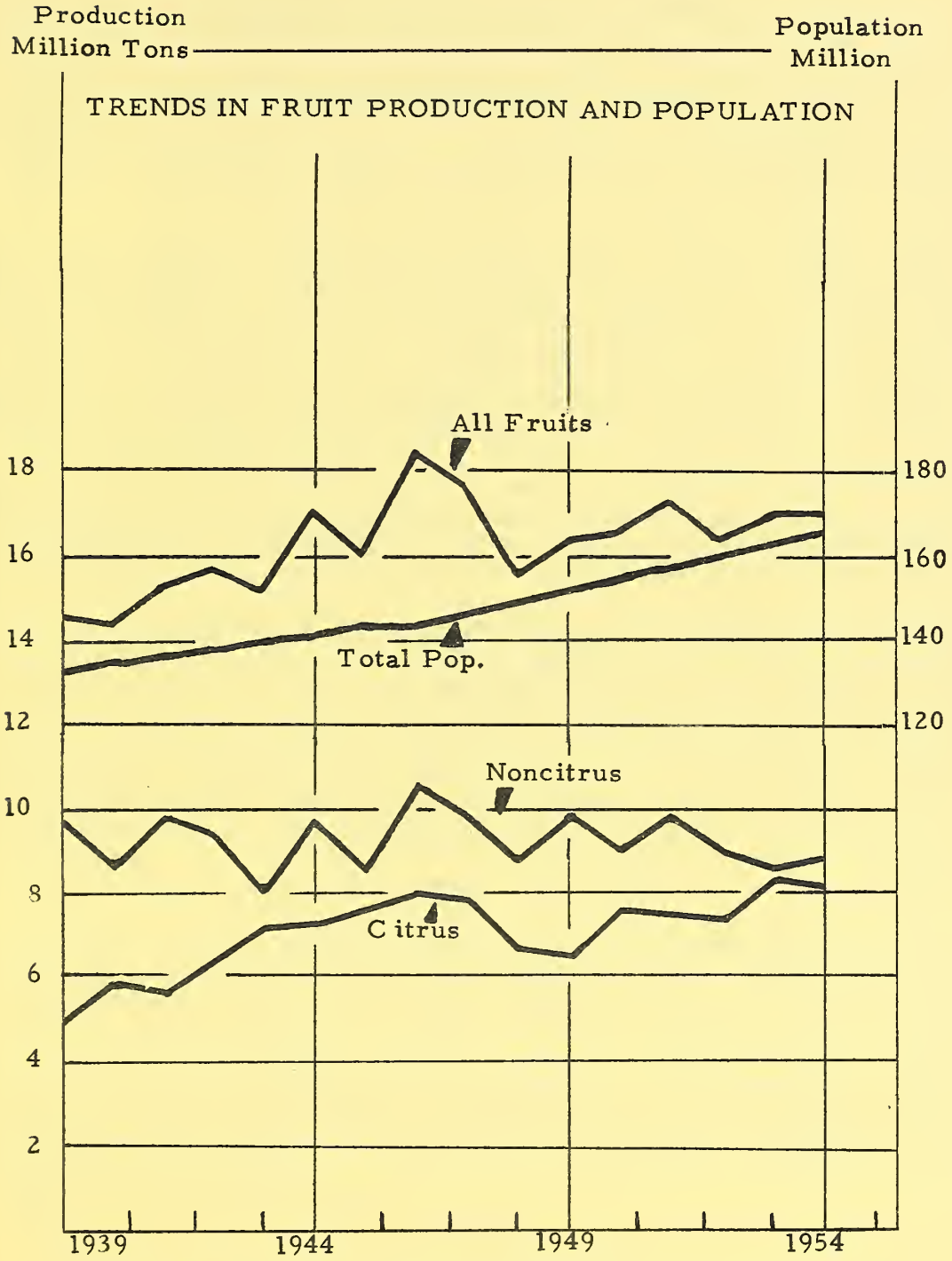
PRODUCTION CONSIDERATIONS IN THE 1956 FRUIT AND TREE NUT OUTLOOK



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PRODUCTION CONSIDERATIONS IN THE 1956 OUTLOOK FOR FRUITS AND TREE NUTS

The level of total fruit production in the United States has increased about 17 percent during the past 15 years, while population during this period has increased about 24 percent. This means that per capita production of fruits has been declining for several years despite higher consumer purchasing power.

The total production of citrus fruits has increased 70 percent since 1939, despite severe freeze damage in several producing areas during this period. This upward trend in citrus production is expected to continue for several years but at a slower rate of increase. Florida continues to expand in bearing capacity, both from new plantings and increasing size of trees. The trend in California oranges and grapefruit is moderately downward and for lemons, about level. Texas citrus trees of all kinds were nearly wiped out in February 1951. The level of production was reduced from about 30 million boxes to less than 1 million but has been reviving since the freeze, reaching 4 million boxes in 1954-55. Texas production should continue to increase for several years. Arizona citrus production probably will not change materially for at least a few years.

Fresh sales of citrus fruits increased steadily from about the turn of the century until the period from 1943 to 1946. Since 1946, total fresh sales of citrus have declined moderately and are now at about the same level as in 1939. Processing of citrus fruits, on the other hand, has continued to increase steadily and the level is now about four times that of 1939. Until about 10 years ago, canned single strength juice was the principal product, but in recent years frozen concentrated orange juice has become the most important citrus product. Frozen concentrated orange juice now accounts for more than a third of all oranges produced in the country and about two-thirds of all oranges processed.

The level of noncitrus fruit production is about the same as it was 15 years ago. Total noncitrus fruits probably will remain at approximately this level for the next few years. Lower levels since 1939 for apples, peaches, prunes, and figs have been offset by increases in pears, grapes, cherries, and cranberries. Apricots, plums, strawberries, and olives are at about the same level of production as 15 years ago. Fresh sales of noncitrus fruits have declined moderately since 1939 while total processing increased about the same amount. Increases in canning and freezing during

this period were about offset by a decline in dried fruits. The production of other processed products--principally vinegar, wine, and jelly--is at about the same level as in 1939.

Total tree-nut production (almonds, walnuts, filberts, and pecans) has increased about 40 percent during the past 15 years, with increases in each of the 4 major kinds. The trend should continue upward for almonds and walnuts for a few years but probably has leveled off for filberts and pecans.

Oranges: The trend in orange production has been upward for 50 years and will probably continue upward for several years but at a slower rate of increase. Production of oranges in the United States is now in greater volume than for any other fruit crop. More than half of the United States production is processed. The production of frozen concentrated orange juice is probably the outstanding development in the United States fruit industry in recent years. The packing of this product on a commercial scale started only about 10 years ago. However, it increased so rapidly that in the past two seasons more than a third of the United States orange crop was used for frozen concentrate. Nearly all of this product has been made in Florida.

Production in Florida for most kinds of oranges continues sharply upward. In California, the production trend has turned moderately downward for both navels and Valencias. California Valencias are essentially the only fresh oranges available during the summer and early fall. This has been a great advantage to California in marketing her Valencia crop. This advantage has been sharply reduced by the competition of frozen orange concentrate from Florida. The pressure of this competition will probably increase as Florida production increases. Many California citrus groves are giving way to the expanding cities and towns, especially in Southern California. Arizona orange production probably will not change materially in the next few years. The Texas production will be relatively small for a few years because of severe freeze damage in 1949 and 1951.

Grapefruit: The production of grapefruit in the United States increased rapidly from 1939 until 1949 when the upward trend was halted by a freeze in Texas. Another Texas freeze in 1951 killed most of the trees. Texas production is expected to increase in the future. The trend in Florida grapefruit will probably continue moderately upward for several years.

Lemons: The level of lemon production has not changed significantly during the past 15 years. A slight to moderate increase is possible in the next few years, since the increase in population should increase the demand for fresh lemons as well as the new processed products such as frozen lemonade concentrate.

Apples: Apples account for about a third of the noncitrus fruit total and provide almost half the fresh market supplies of domestic noncitrus fruit. The production trend for apples has been moderately downward since 1939, and appears to be leveling off at 15 to 20 percent below the production potential of 1939. Sales of nursery stock are reported to have been large during the past 2 years. The decline in apple production has been accounted for mostly by the removal of low yielding orchards and less desirable varieties. Despite the downtrend in production, processing has been increasing, particularly the canning of applesauce in the East.

The production of apples in New England has increased moderately since 1939, in contrast with moderate to sharp declines for all other important producing areas of the East. New York is down about a fifth and the Appalachian area (Pennsylvania, Maryland, Virginia, West Virginia) is down about a fourth. These areas have probably leveled off in production.

Michigan production has fluctuated between 5 and 12 million bushels since 1939 but production capacity has declined only slightly. This trend is expected to hold about level or increase moderately during the next few years. The total production level for the other Central States is down about a third with considerable variation among the States.

Washington State produced a record crop of 35½ million bushels in 1950. The following four crops were each less than 25 million bushels but the 1955 crop is estimated at 31 million. Production capacity in this State declined moderately between 1939 and 1943 but has been increasing since 1943 and is now about the same as in 1939. This slight upward trend is expected to continue during the next few years.

California apple production increased from 1939 to 1947 when a record crop of 11 million bushels was produced. The tend has leveled off moderately below the peak of 1947 and is expected to hold about steady for a few years. Each of the other Western States shows a decline since 1939 and a slight to moderate decline can be expected for the next few years.

Peaches: Peaches are exceeded in importance only by apples and grapes among noncitrus fruits. Fresh sales of peaches amount to about half of production and are second only to fresh apple sales in tonnage. Production increased sharply from 1939 until 1946 and has since declined to a level slightly below that of 1939. In the spring of 1955, a disastrous freeze in the Southern States practically wiped out the 1955 peach crop in those States and killed or damaged a great many peach trees. The production capacity in these States will be reduced for at least 2 or 3 years.

The potential level of production in California, where about one-half of the United States total peaches are grown, has increased moderately during the past 10 years. About two-thirds of the peaches produced in California have been clingstones used principally for canning. In order to hold production of clingstones within the limits of market requirements, California growers have put into operation a "green drop" program in recent years of large production. This program, which is operated as part of a marketing agreement, has resulted in the elimination of about 15 percent of production by stripping the green fruit from the trees early in the season.

The production level in the important Western States of Colorado, Washington, and Oregon increased between 1939 and 1946 but has not changed significantly during the past 10 years. No important changes are expected in these States during the coming few years except some possible expansion in the Grand Coulee Project of Washington.

Production trends in nearly all areas of the Northeastern and North Central States have been moderately downward except in New Jersey, which has shown a moderate increase.

The Southeastern and South Central States have been decreasing in production levels at rates from moderate to rapid. The 1955 freeze in these States will no doubt accelerate the downtrend--at least temporarily.

Pears: Pear production increased moderately between 1939 and 1947 and has since declined to about the same level as in 1939. The three Pacific Coast States moduce more than four-fifths of the Nation's pears and the proportion is increasing. Little change is expected during the next few years in overall pear production. The pear crops in California and Oregon have increased about 50 percent since 1939, while the Washington crop has not changed significantly. The increases in California and Oregon have been offset by decreases in nearly all Eastern and Central States. Fire blight has been a serious threat to pear trees for many years in nearly all areas of the country. The Western States have been able to keep the blight under control but damage in the Eastern and Central States has been severe. Some of the new treatments, especially antibiotics, show promise of controlling blight.

Grapes: The level of grape production in the United States increased about a fourth between 1939 and 1951. Since 1951, the trend apparently has turned downward. California continues to produce about nine-tenths of the United States total grapes. All three classes of California grapes (wine, table, and raisin) show about the same trend pattern since 1939--an increase between 1939 and 1951 and a moderate decline since 1951.

Grape production in Washington has increased steadily for more than 20 years and is now exceeded only by California and New York. The present level is more than four times as large as it was 15 years ago. This upward trend will probably continue for a few years. Production in the Great Lakes States varies widely from year to year from the effects of weather but the trend has been upward since 1939.

Cherries: The trend in production of sweet cherries was sharply upward until 1949 and has not changed significantly since. Little change is expected in the near future.

The production potential for sour cherries has increased steadily in the past 16 years and is now about 50 percent higher than in 1939. Actual production has fluctuated widely from year to year because of damage from freezes, frosts, and storms. The biggest crop to date was in 1951 when about 158,000 tons were harvested, including 8,700 tons which were not utilized because of low prices. In 1952, 1953, and 1954, production ranged from 108,000 to 132,000 tons but in 1955 again reached the 150,000-ton mark.

Production is expected to trend moderately upward for several years because of extensive recent plantings in Michigan and New York.

Plums: Plums are estimated only for California and Michigan. California produces more than nine-tenths of the total. The production level is moderately higher than in 1939. Very little change is expected in the near future.

Prunes: Production has declined about a fourth since 1939 but is expected to change very little in the next few years. Sharp drops occurred in Washington, Oregon, and California. The level in Idaho changed very little but Idaho accounts for only about 5 percent of the total production. Practically all of the California prunes are dried while most of the prunes in Washington, Oregon, and Idaho are sold fresh or canned.

Apricots: The level of apricot production has declined about a fourth since 1939. This decline is expected to continue for some time but at a slower rate. California produces about nine-tenths of the United States crop. From a fourth to a third of the crop is dried--all in California.

Cranberries: Cranberry production has trended upward since 1939. This trend probably will continue for a few years. Processing is the most important factor in the increase of cranberry production. Prior to 1934, processing was not important, but this utilization has since

expanded rapidly and now accounts for more than half of the production. The marketing season is extended throughout the year by the canned pack of cranberry products. Massachusetts has consistently produced more than half of the United States crop but the proportion of production in Massachusetts is decreasing as Wisconsin, Washington, and Oregon become more important producers. New Jersey holds at about the same level. Wisconsin has more than doubled in production since 1939 while Washington and Oregon crops are about 5 times as large as in 1939.

Fruits and Tree Nuts: Production and Per Capita Production, United States, 1939-1954

Year	Total Citrus 1/		Total Noncitrus 2/	
	Production	Per Capita 4/	Production	Per Capita 4/
	1,000 tons	Pounds	1,000 tons	Pounds
1939	4,776	72	9,698	146
1940	5,662	85	8,628	129
1941	5,521	83	9,680	145
1942	6,302	95	9,282	139
1943	7,089	109	7,971	122
1944	7,233	111	9,683	149
1945	7,466	114	8,489	130
1946	7,861	112	10,531	150
1947	7,792	108	9,838	136
1948	6,636	90	8,764	119
1949	6,479	87	9,761	130
1950	7,538	99	8,967	118
1951	7,368	96	9,816	128
1952	7,338	94	8,962	115
1953	8,220	104	8,636	109
1954	8,053	100	8,815	109

Year	Total Fruits		Total Tree Nuts 3/	
	Production	Per Capita 4/	Production	Per Capita 4/
	1,000 tons	Pounds	1,000 tons	Pounds
1939	14,474	218	144	2.2
1940	14,290	213	130	1.9
1941	15,201	227	147	2.2
1942	15,584	234	136	2.0
1943	15,060	231	158	2.4
1944	16,916	260	182	2.8
1945	15,955	244	177	2.7
1946	18,392	262	165	2.4
1947	17,630	244	170	2.4
1948	15,400	209	201	2.7
1949	16,240	217	204	2.7
1950	16,505	217	170	2.2
1951	17,184	224	204	2.7
1952	16,300	210	206	2.6
1953	16,856	213	209	2.6
1954	16,868	209	172	2.1

1/ Citrus fruit total includes oranges, tangerines, grapefruit, lemons, limes. The season for citrus fruits begins with the bloom of the year shown and ends with the completion of harvest the following year.

2/ Noncitrus fruit total includes apples (commercial)peaches, pears, grapes, cherries, plums, prunes, apricots, figs, olives, avocados, cranberries, strawberries.

3/ Tree nut total includes almonds, walnuts, filberts, pecans.

4/ Per capita production based on total population July 1 for years 1939-40, population eating out of civilian supplies, 1941-54. Estimates from data of Federal agencies with adjustments for under-enumeration.

Citrus Fruits and Tree Nuts: Production, by Kinds, United States, 1939-1954

Year	Oranges (including Tangerines)	Grapefruit	Lemons	Limes	Total citrus	Total fruits
			- 1,000 tons -			
1939	2,958	1,359	455	4	4,776	14,474
1940	3,335	1,669	655	3	5,662	14,290
1941	3,488	1,564	463	6	5,521	15,201
1942	3,728	1,979	588	7	6,302	15,584
1943	4,455	2,191	436	7	7,089	15,060
1944	4,693	2,034	496	10	7,233	16,916
1945	4,402	2,485	571	8	7,466	15,955
1946	4,979	2,330	545	7	7,861	18,392
1947	4,850	2,427	508	7	7,792	17,630
1948	4,440	1,793	395	8	6,636	15,400
1949	4,603	1,417	449	10	6,479	16,240
1950	5,175	1,821	531	11	7,538	16,505
1951	5,262	1,590	506	10	7,368	17,184
1952	5,323	1,506	497	12	7,338	16,300
1953	5,670	1,898	637	15	8,220	16,856
1954	5,833	1,652	553	15	8,053	16,868

Year	Almonds	Walnuts	Filberts	Pecans	4 Nuts
			- 1,000 tons -		
1939	29	62	4	49	144
1940	15	51	3	61	130
1941	10	70	6	61	147
1942	32	61	4	39	136
1943	20	64	7	67	158
1944	32	72	7	71	182
1945	32	71	5	69	177
1946	47	72	8	38	165
1947	36	65	9	60	170
1948	36	71	6	88	201
1949	43	88	11	62	204
1950	38	64	7	61	170
1951	43	77	7	77	204
1952	36	84	12	74	206
1953	39	59	5	106	209
1954	43	75	9	45	172

Noncitrus Fruits: Production by Kinds, United States, 1939-54

Year	Apples (Com'l)	Peaches	Pears	Grapes	Cherries	Plums	Prunes
			- 1,000 tons -				
1939	3,342	1,541	721	2,449	184	77	673
1940	2,674	1,388	730	2,466	173	74	543
1941	2,933	1,809	719	2,725	162	77	583
1942	3,041	1,601	746	2,396	197	76	542
1943	2,095	1,026	593	2,965	116	78	625
1944	2,910	1,874	766	2,696	196	96	507
1945	1,600	1,902	799	2,767	148	73	711
1946	2,854	1,988	823	3,137	228	106	688
1947	2,709	1,834	837	3,020	171	79	594
1948	2,144	1,455	614	3,061	213	72	544
1949	3,216	1,660	835	2,623	245	99	536
1950	2,988	1,215	719	2,688	239	84	418
1951	2,656	1,527	736	3,390	230	102	538
1952	2,220	1,501	758	3,164	218	61	423
1953	2,239	1,547	715	2,700	224	92	455
1954	2,628	1,472	744	2,569	206	79	515

Year	Apricots	Figs	Olives	Avocados	Cranberries	Straw-berries (Com'l)	Total Noncitrus
			- 1,000 tons -				
1939	332	88	23	10	35	223	9,698
1940	127	112	69	16	29	227	8,628
1941	214	121	55	20	36	226	9,680
1942	228	103	57	18	41	236	9,282
1943	104	134	57	26	34	118	7,971
1944	352	125	42	17	19	83	9,683
1945	192	113	30	27	33	94	8,489
1946	339	129	48	20	43	128	10,531
1947	201	131	40	21	40	161	9,838
1948	246	103	58	17	48	189	8,764
1949	197	94	35	21	42	158	9,761
1950	215	85	42	28	49	197	8,967
1951	183	103	64	34	46	207	9,816
1952	177	99	57	32	40	212	8,962
1953	243	83	28	32	60	218	8,636
1954	155	89	52	50	51	205	8,815

Fruits: Production and Utilization of Sales, Citrus and Noncitrus, United States, 1939-1954

Year	Citrus			
	Production 1,000 tons	Total Sales 1,000 tons	Fresh Sales 1,000 tons	Processed 1,000 tons
1939	4,776	4,690	3,609	1,081
1940	5,662	5,566	4,053	1,513
1941	5,521	5,462	4,137	1,325
1942	6,302	6,245	4,385	1,860
1943	7,089	7,021	4,997	2,024
1944	7,233	7,128	4,929	2,199
1945	7,466	7,399	4,610	2,789
1946	7,861	7,553	4,956	2,597
1947	7,792	7,413	4,297	3,116
1948	6,636	6,558	3,796	2,762
1949	6,479	6,399	3,333	3,066
1950	7,538	7,457	3,769	3,688
1951	7,368	7,160	3,820	3,340
1952	7,338	7,267	3,874	3,393
1953	8,220	8,078	3,745	4,333
1954	8,053	7,970	3,849	4,121

Year	Noncitrus						
	Production	Total Sales	Fresh Sales	Canned	Dried	Frozen	Other Processing
	1,000 tons	1,000 tons					
				- 1,000 tons -			
1939	9,698	8,791	4,295	945	2,255	24	1,272
1940	8,628	8,014	4,080	874	1,572	31	1,457
1941	9,680	9,050	4,371	1,182	1,783	37	1,677
1942	9,282	8,568	4,113	1,192	2,024	28	1,211
1943	7,971	7,691	2,967	854	2,576	88	1,206
1944	9,683	9,149	4,111	1,176	2,264	163	1,435
1945	8,489	8,102	3,500	983	1,994	193	1,432
1946	10,531	10,146	4,226	1,623	1,867	199	2,231
1947	9,838	9,340	4,248	1,370	2,168	115	1,439
1948	8,764	8,401	3,488	1,317	1,652	152	1,792
1949	9,761	8,918	4,080	1,428	1,830	139	1,441
1950	8,967	8,565	3,581	1,515	1,366	206	1,897
1951	9,816	9,233	3,614	1,645	1,706	174	2,094
1952	8,962	8,641	3,627	1,458	1,768	181	1,607
1953	8,636	8,340	3,478	1,583	1,608	219	1,452
1954	8,815	8,514	3,493	1,691	1,403	235	1,692