

RPAC 2020 Crop Analysis So Far:

Nonpareil - In 2019 made up 1.05 Billion Lbs. - about 41% of the 2.551 Billion Lb. Crop - We expect 175 to 250 million lbs. of growth this season

Acreage is Increasing. Fresno south the Nonpareil crop seems fairly flat on yields, but benefits from acreage and the young acreage going up in age i.e. 4th, 5th leaf orchards. Locally our mature (6th and older) NP are up 2% but we are up 11% overall due to the large amount of young acreage. Madera to the North is reporting good to phenomenal yields. From the 2016 to 2019 crops the total Nonpareil volume changed annually by 115.8, 107.3, -29.2, and 153.5 million lbs. This year seems like a back to back large growth year.

Monterey - 460 Million Lbs. - 18% of the 2019 crop - Expect growth of 30 - 40 M lbs.

Increasing acreage. This seems to be one of the least improved varieties vs. last year. Locally our mature Monterey are down 8% and down 2.5% overall. We hear similar reports further south. The east side and North seem to have better Monterey crops but not as impressive as their Nonpareil yields vs. last year. From the 2016 to 2019 crops the total Monterey volume increased annually by 25.8, 34.5, 34.3, and 54.4 million lbs. Even in mediocre or off years Monterey volume has grown due to acreage trends.

Butte/Padre - 296 Million Lbs. - 11.6% of the 2019 crop - Expect similar volume this season, perhaps +/- 5 M lbs.

Decreasing acreage. Yields in our area are mixed but with more up than down. Due to older blocks being removed, our total volume for this season, based on field weight, is down 3%. After several years of light Butte/Padre yields due to the 2018 frost and 2019 bacterial blast, yields in 2020 seem to be considerably up in the Center-East and North. Due to good yields but declining acres, this group may be relatively flat. The last time it was up in total volume was in 2016 and only by 1.4% (5.5 million lbs.)

Independence - 157 Million Lbs. - 6.2% of the 2019 crop - Expect growth of 60 - 80 M lbs.

Greatly increasing acreage. Our Independence receipts on 6th leaf and older are down 9% on mature trees and but up 2% overall. The East sides and North are experiencing Independence yields lower than growers hoped for based on how they looked on the tree, not excellent, but still up from last year, and considerably up with the young acreage. From the 2016 to 2019 crops the total volume grew annually by 12.6, 28.5, 52.5 then 45.8 million lbs.

Carmel - 122 Million Lbs. - 4.8% of the 2019 crop - Expect a decline of 10 - 20 M lbs.

Decreasing acreage. Carmel for us locally are off 7% on mature trees and overall. Generally, reports are not great for Carmel. In 2016 they saw their last increase in volume, which was 18.5 million lbs., then subsequently declined by 24.2, 2.8, and 7.6 million lbs.

Fritz - 112 Million Lbs. - 4.4% of the 2019 crop - Expect an increase of +/- 10 M lbs.

Fairly steady Acreage. Yields are up 7% in our area. Should be up more in better areas of the state like the east side and North. From the 2016 to 2019 crops the total Fritz volume changed annually by 6.9, -9.8, 9.2, and -7.6 million lbs. This seems like their "on year".

Wood Colony - 99.5 Million Lbs. - 3.9% of the 2019 crop - Expect growth of 25 - 30 M lbs.

Increasing Acreage. Yields are up 17% in our area for mature trees, 21% overall. We hear good yields all over the state. From the 2016 to 2019 crops the total WC volume changed annually by 24.9, 16.1, -10.1, and 27.8 million lbs.

Aldrich - 90.1 Million Lbs. - 3.5% of the 2019 crop - Expect growth of +/- 15 M lbs.

Increasing Acreage. Yields are up 6% in our area for mature trees, 8% overall. From the 2016 to 2019 crops the total Aldrich volume grew annually by 10.6, 2.9, 16.1, and 2.4 million lbs.

Other Varieties are relatively minor once you get below Aldrich. You could see some 10 - 15 million lbs. of growth from Price and others (taking out some declines in disappearing varieties like Mission).

The above estimations give an increase in the range of 300 to 435 million lbs. That would put the crop at a range of 2.85 to 2.986 billion lbs.

NASS is forecasted an 18% increase in supply to reach the 3.0 Billion lbs., which seems possible but on the high side in our opinion.