

PEACH FUZZ



An exclusive membership newsletter published by California Canning Peach Association the cooperative bargaining association in the canning cling peach industry.

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CCPA'S PRETHINNING ESTIMATE TOTALS 213,740 TONS

The Association's 2023 Prethinning Estimate, which is based on figures provided by our Directors, Delegates, and Committeemen covering a total of more than 5,200 acres, amounts to 213,740 tons, up 5% from our 2022 crop of 204,440 tons. The 2023 crop estimate represents an average yield of 15.7 tons/acre, up 5% from last year's 15.0 ton/acre yield. The estimated 15.7 ton/acre yield would be the fourth consecutive year that the industry yield was in the 15 ton/acre range. Our projected bearing acreage is 13,582 acres which represents a 90 acre decrease from 2022's 13,672 bearing acres. The biggest projected yield increase is the Extra Early varietal group which shows a 22% increase (14.5 tons/acre vs. 11.9 tons/acre last year). The Early varietal group yield is unchanged from last year at 13.3 tons/acre while Lates are up 1% to 17.6 tons/acre and Extra Lates yields are expected to increase 8% to 16.2 tons/acre. Area yields are expected to improve by 10% in the Yuba/Sutter area (15.7 tons/acre vs. 14.3 tons/acre last year). Modesto yields are expected to drop 4% to 15.6 tons/acre while Kingsburg yields are projected to increase by 10% to 16.7 tons/acre. Earlier in May, the USDA's National Ag Statistics Service released their initial 2023 California Cling Peach crop estimate of 210,000 tons. The industry's 2023 Block X Block estimate is scheduled to be released on June 12th.

2023 Prethinning Estimate

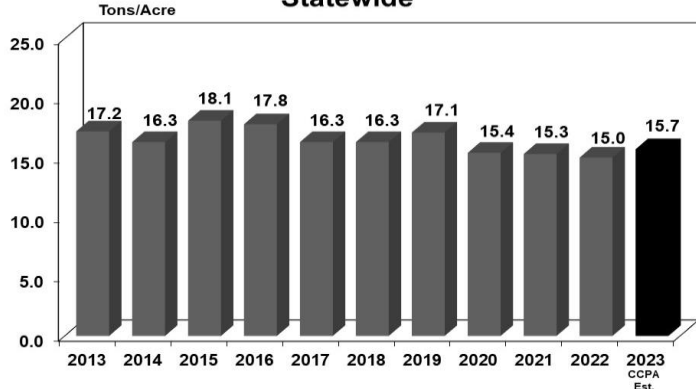
Tonnage by Area

| Area | Bearing Acres | Prethinning Estimate | 2022 Deliveries | % Change vs Last Year | Yield/Acre |
|---------------|---------------|----------------------|-----------------|-----------------------|-------------|
| Yuba/Sutter | 8,348 | 130,735 | 119,687 | +9% | 15.7 |
| Stockton | 688 | 10,747 | 11,312 | -5% | 15.6 |
| Modesto | 3,376 | 51,045 | 54,186 | -6% | 15.6 |
| Kingsburg | 1,270 | 21,213 | 19,255 | +10% | 16.7 |
| TOTALS | 13,582 | 213,740 | 204,440 | +5% | 15.7 |

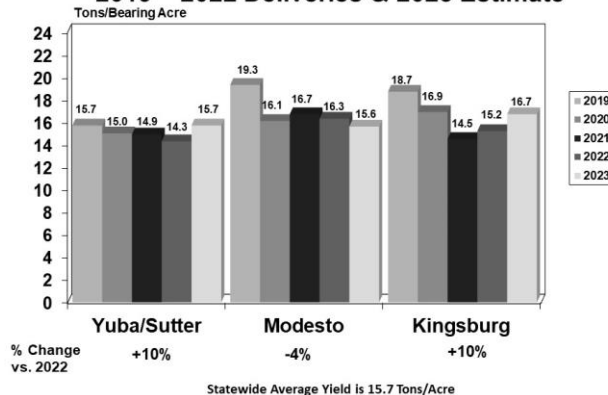
Tonnage by Varietal Group

| Varietal Group | Bearing Acres | Prethinning Estimate | 2022 Deliveries | % Change vs Last Year | Yield/Acre |
|----------------|---------------|----------------------|-----------------|-----------------------|-------------|
| Extra Early | 3,255 | 47,117 | 39,528 | +19% | 14.5 |
| Early | 2,980 | 39,515 | 39,361 | N/C | 13.3 |
| Late | 5,750 | 101,206 | 102,374 | -1% | 17.6 |
| Extra Late | 1,597 | 25,902 | 23,177 | +12% | 16.2 |
| TOTALS | 13,582 | 213,740 | 204,440 | +5% | 15.7 |

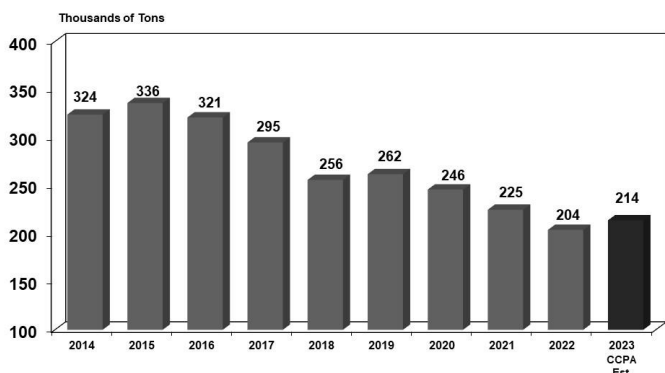
California Cling Peach Yield Trends Statewide



California Cling Peach Industry Yield/Acre Comparison By Area 2019 – 2022 Deliveries & 2023 Estimate



California Cling Peach Delivery Trends Total Tons to All Processors



California Canning Peach Association 2023 Prethinning Estimate

| Area | Acres in Prethinning Estimate | Total Bearing Acres | % of Total |
|---------------|-------------------------------|---------------------|------------|
| Yuba/Sutter | 3,699 | 8,348 | 44% |
| Stockton | 259 | 688 | 38% |
| Modesto | 968 | 3,276 | 30% |
| Kingsburg | 314 | 1,270 | 25% |
| TOTALS | 5,240 | 13,582 | 39% |

RETURN SERVICE REQUESTED

CURRENT CROP CONDITIONS

Peach growers are continuing to thin their orchards in all three growing areas. As a result of inconsistent fruit sets in many orchards this year, some growers are electing to pay on an hourly basis instead of the typical “per tree” payment practice. The 2023 peach crop timing continues to be much later than last year. Our statewide full bloom date of March 14 was eight days later than last year’s date but our statewide Reference Date timing of May 27 is 15 days later than last year’s May 12th Reference Date. The 74 day interval between our 2023 full bloom date and Reference Date is the longest since 2003 (2005 & 2006 matched our current 74 day interval). Fruit sizing at the Reference Date is better than normal in all three growing areas. Yuba/Sutter area fruit sizes at Reference Date averaged 36.9mm vs. 36.4mm last year. The Modesto area averaged 37.4mm, nearly unchanged from last year’s 37.5mm fruit size. Reference Date Plus 10-day sizes in Kingsburg amounted to 37.8mm vs. 39.1mm last year.

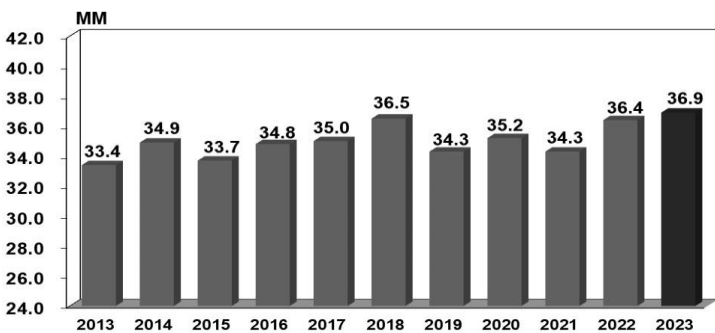
2023 Reference Date Timing

| <u>Area</u> | <u>2019</u> | <u>2020</u> | <u>2021</u> | <u>2022</u> | <u>2023</u> |
|-------------|-------------|-------------|-------------|-------------|-------------|
| Yuba/Sutter | May 20 | May 13 | May 17 | May 13 | May 29 |
| Modesto | May 13 | May 15 | May 14 | May 10 | May 25 |
| Kingsburg | May 11 | May 11 | May 14 | May 8 | May 20 |
| Statewide | May 17 | May 13 | May 16 | May 12 | May 27 |

Interval Between Full Bloom & Reference Date

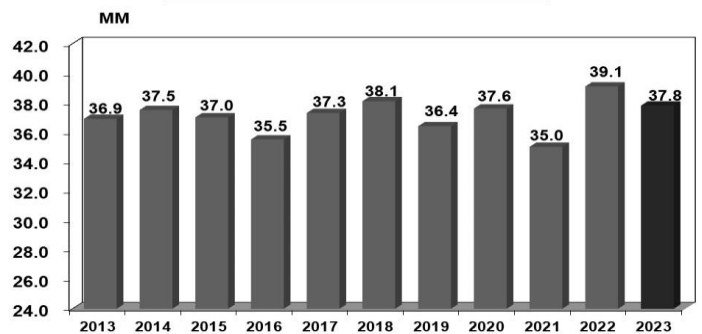
| <u>Year</u> | <u>Days</u> |
|-------------|-------------|
| 2019 | 60 |
| 2020 | 71 |
| 2021 | 70 |
| 2022 | 67 |
| 2023 | 74 |

**Reference Date Sizes in Yuba/Sutter
 2013 - 2023**



10 Year Average Reference Date Size is 34.9 mm.

**Reference Date Sizes in Kingsburg
 10 Days After Reference Date**



10 Year Average Reference Date Plus 10 Days Size is 37.0 mm.

PEACH TREE SALES UP 208% IN 2023

According to responses to the Peach Association’s annual survey of nurseries selling cling peach trees to California growers for 2023 plantings, a total of 285,035 trees were sold this year which amounts to a 208% increase over 2022 tree sales. (The 2023 sales volume nearly equals the combined sales volume of the past four years.) The four leading varieties sold this year were Kader, Stanislaus, Calaveras, and Ross. Collectively the four varieties accounted for more than half of all sales volume. The Association projects that total new plantings this year (excluding replants in existing orchards) will amount to approximately 1,250 acres.

**Cling Peach Tree Sales
 2023 Nursery Survey Results – Top Varieties**

| <u>Variety</u> | <u>2021 Sales</u> | <u>2022 Sales</u> | <u>2023 Sales</u> |
|------------------------|-----------------------|-----------------------|-----------------------|
| Kader | 23,024 | 36,473 | 55,818 |
| Stanislaus | 3,015 | 3,270 | 38,454 |
| Calaveras | 7,287 | 8,740 | 34,354 |
| Ross | 3,688 | 2,910 | 28,341 |
| Starn | 8,156 | 5,613 | 28,147 |
| Vilmos | 9,654 | 11,137 | 22,664 |
| Late Ross | 3,089 | 2,841 | 20,149 |
| Lilleland | 8,553 | 253 | 12,280 |
| Carson | 1,390 | 6,066 | 11,650 |
| Klamath | 4,986 | 7,319 | 9,751 |
| Loadel | 3,885 | 3,273 | 5,561 |
| American | 0 | 1,986 | 3,350 |
| Kingsburg Kling | 848 | 1,833 | 1,631 |
| All Other | 2,652 | 825 | 12,885 |
| Totals | 80,227 | 92,539 | 285,035 |