



STRAWBERRY REVIEW

2006 Acreage Survey - Updated February 2006

ACREAGE TRENDS

The California Strawberry Commission's 2006 acreage survey reports different trends for fall-planted acreage compared to acreage planted in the summer months. **California strawberry acreage planted in the fall, which produces fruit during the traditional winter, spring, and summer seasons, increased in 2006 by 193 acres or 0.7% statewide.** Fewer acres were planted in Orange County/San Diego and San Joaquin compared to the previous year. Acreage in Orange County/San Diego decreased by 600 acres; San Joaquin decreased by 135 acres. Oxnard and Watsonville/Salinas reported the largest increases in acreage planted with 162 and 778 acres respectively. The Watsonville/Salinas district continues to be the largest producing area with 12,775 acres planted in the fall. Fall-planted acreage in Santa Maria decreased slightly compared to 2005.

Fall Planted Acreage for Winter, Spring and Summer Production

By District	2002	2003	2004	2005	2006	change	% chng
Orange Co. / San Diego	2,506	2,877	2,899	2,427	1,827	(600)	-24.7%
%State	10.7%	11.8%	10.8%	8.5%	6.3%		
Oxnard	7,081	6,950	7,784	8,033	8,195	162	2.0%
%State	30.3%	28.6%	29.0%	28.1%	28.4%		
Santa Maria	3,839	4,167	4,755	5,864	5,852	(12)	-0.2%
%State	16.4%	17.2%	17.7%	20.5%	20.3%		
Watsonville	9,631	10,293	11,410	11,997	12,775	778	6.5%
%State	41.2%	42.4%	42.5%	41.9%	44.3%		
San Joaquin	309	0	0	304	169	(135)	-44.4%
%State	1.3%	0.0%	0.0%	1.1%	0.6%		
State Total	23,365	24,286	26,847	28,625	28,817	193	0.7%

California strawberry acreage planted in the summer, which produces during the fall season, increased by 1,326 acres or 33% in 2006. Most of the summer planted acreage is located in Oxnard and Santa Maria, and these districts reported the largest increases compared to 2005. Santa Maria acreage increased by 1,005 acres and Oxnard by 441 acres. Summer planted acreage was reported as 15.6% of the state total in 2006 compared to 12.3% in 2005.

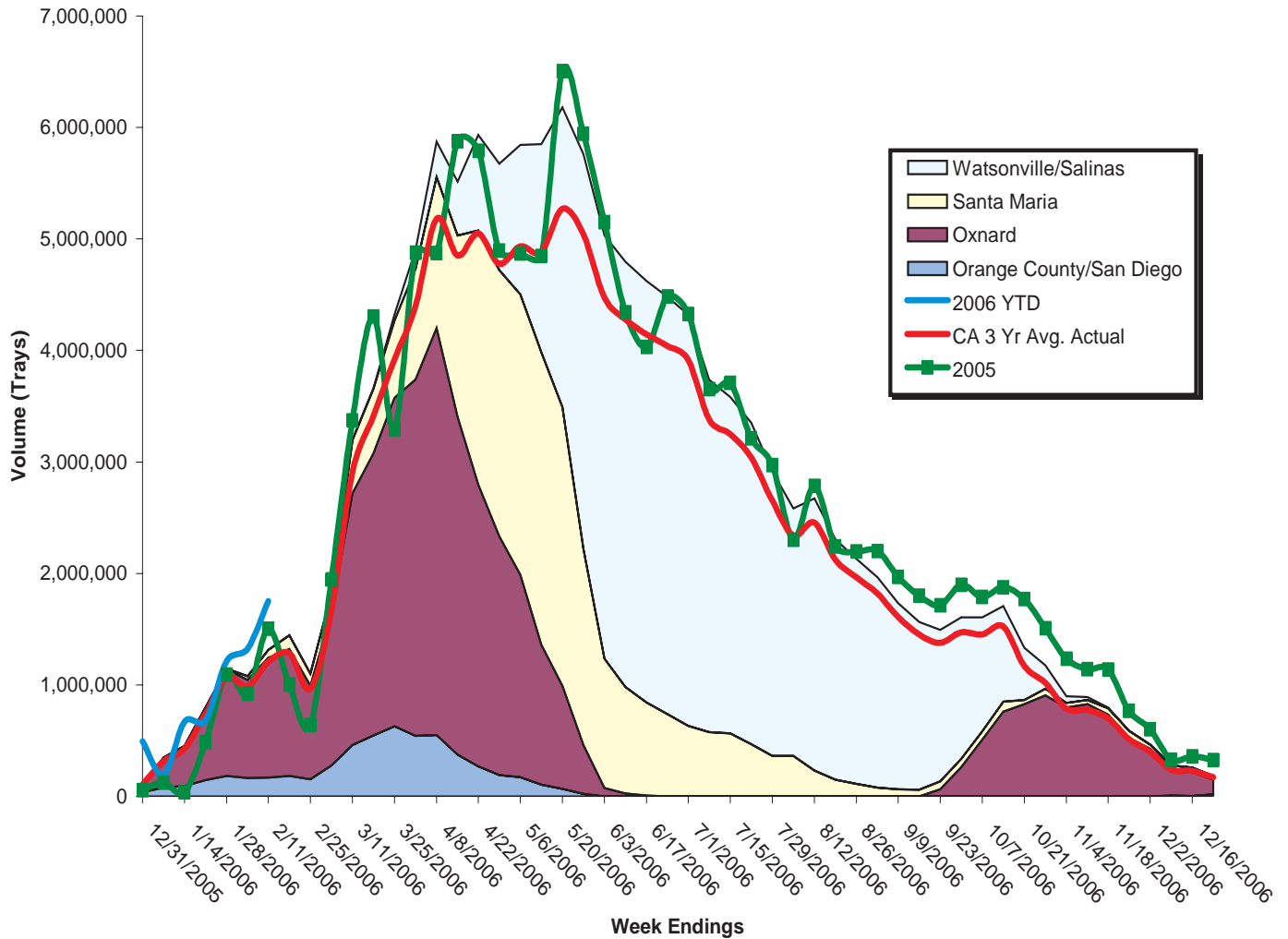
Summer Planted Acreage for Fall Production

By District	2002	2003	2004	2005	2006	change	% chng
Orange Co. / San Diego	32	6	0	30	28	(2)	-6.7%
%State	0.9%	0.2%	0.0%	0.7%	0.5%		
Oxnard	1,501	1,844	2,565	3,300	3,741	441	13.4%
%State	43.3%	46.8%	53.5%	82.3%	70.1%		
Santa Maria	261	271	892	429	1,434	1,005	234.1%
%State	7.5%	6.9%	18.6%	10.7%	26.9%		
Watsonville	1,670	1,394	791	253	135	(118)	-46.6%
%State	48.2%	35.3%	16.5%	6.3%	2.5%		
San Joaquin	0	429	544	0	0	0	0
%State	0.0%	10.9%	11.4%	0.0%	0.0%		
State Total	3,464	3,944	4,792	4,012	5,338	1,326	33.0%

Total California strawberry acreage reported for the 2006 season is 34,155 acres. The reported increase over 2005 acreage is 1,518 acres or an additional 4.7%.

2006 PROJECTED VOLUME BY DISTRICT

The chart below projects 2006 California fresh strawberry volume based on the three year average weekly yields for each district applied to the 2006 reported acreage for each district. Actual shipments through February 11, 2006 are trending ahead of projection at 5,834,900 trays in total. Favorable weather is expected to drive a rapid increase in production over the next few weeks.



ORGANIC TRENDS

Organic Trends

Fall planted organic acreage statewide increased by 433 acres, primarily in the Watsonville/Salinas and Oxnard districts. Santa Maria reported organic acreage for the first time at 95 acres. Summer planted organic acreage dropped slightly. Total organic acreage was reported at 965 acres, an increase of 424 acres or 78% compared to 2005.

Fall Planted for Winter, Spring and Summer Production

Organic By District	2002	2003	2004	2005	2006	change	% chng
Orange Co./San Diego	52	70	76	48	5	(43)	-89.6%
%State	14.2%	11.9%	12.9%	10.1%	0.6%		
Oxnard	55	224	153	68	192	124	180.5%
%State	15.2%	38.4%	26.0%	14.4%	21.1%		
Santa Maria	0	0	0	0	95	95	
%State	0.0%	0.0%	0.0%	0.0%	10.5%		
Watsonville	256	290	359	358	616	258	71.9%
%State	70.6%	49.7%	61.0%	75.5%	67.8%		
State Total	363	583	588	475	908	433	91.2%

Summer Planted for Fall Production

Organic By District	2002	2003	2004	2005	2006	change	% chng
Orange Co./San Diego	0	0	0	0	0		
%State	0.0%	0.0%	0.0%	0.0%	0.0%		
Oxnard	0	8	0	25	35	10	40.0%
%State	0.0%	33.3%	0.0%	37.9%	61.4%		
Santa Maria	0	0	0	0	0		
%State	0.0%	0.0%	0.0%	0.0%	0.0%		
Watsonville	15	16	19	41	22	(19)	-46.3%
%State	100.0%	66.7%	100.0%	62.1%	38.6%		
State Total	15	24	19	66	57	(9)	-13.6%

Organic by Variety	Acreage
Albion	172
%State	18%
Camrosa	162
%State	17%
Diamante	7
%State	1%
Other	131
%State	14%
Proprietary	453
%State	47%
Ventana	40
%State	4%
Total	965

In 2006, all major reported varieties contribute to the state's organic acreage as shown in the table to the left. Proprietary varieties dominate the mix totaling 47% of the state's organic acreage. Newcomer Albion reported 172 acres followed by Camarosa at 162 acres, and Other varieties at 131 acres. Diamante and Ventana varieties contribute 5% of the state's organic acreage.

VARIETAL TRENDS

Proprietary varieties represent the largest single variety type statewide, consisting of 39% of the state's acreage. However, the sum of University of California (UC) developed varieties: Albion, Camarosa, Ventana, Diamante and Other total 20,841 acres compared to 13,314 acres of Proprietary varieties. Diamante, the state's second largest variety, decreased to 6,023 acres replaced primarily by Albion. Camarosa has decreased to 5,675 acres. The Ventana variety decreased to 4,634 acres. The latest UC variety, Albion, planted in the Santa Maria and Watsonville/Salinas districts, reported 2,795 acres. Due to declining acreage, the Chandler, Selva, Aromas and Camino Real varieties are counted as Other varieties comprising 6.5% of the state's acreage.

By Variety	2002	2003	2004	2005	2006	change	% chng
Albion					2,795	2,795	100%
% State					8.2%		
Camarosa	10,485	9,626	9,832	6,462	5,675	(787)	-12.2%
% State	39.1%	34.1%	31.1%	19.8%	16.6%		
Diamante	6,408	7,445	7,527	7,515	6,023	(1,492)	-19.9%
% State	23.9%	26.4%	23.8%	23.0%	17.6%		
Other	1,806	1,718	1,748	1,610	1,714	105	6.5%
% State	6.7%	6.1%	5.5%	4.9%	5.0%		
Proprietary	8,068	8,421	9,756	12,271	13,314	1,043	8.5%
% State	30.1%	29.8%	30.8%	37.6%	39.0%		
Ventana	62	1,020	2,777	4,779	4,634	(145)	-3.0%
% State	0.2%	3.6%	8.8%	14.6%	13.6%		
State Total	26,828	28,230	31,639	32,636	34,155	1,518	4.7%

SOUTHERN DISTRICTS

(Orange, San Diego and Riverside Counties)

The Orange County area remains the primary location for acreage at 1,301 acres despite decreasing from last years' total of 1,598 acres due to land development and rising property costs in the area. Additionally, San Diego area acreage decreased to 279 acres from the previous year. Coachella reported 275 acres, a decrease of 98 acres in 2005.

These districts show that the Camarosa variety decreased from 1,201 acres in 2005 to 718 acres in 2006. Ventana, remains the top variety in the district, despite a decrease of 172 acres from 1,036 acres last year. Proprietary varieties represent 5.2% of the district. Other varieties have all but disappeared in Orange County/San Diego.

Orange Co. / San Diego	2002	2003	2004	2005	2006	change	% chng
Camarosa	2,384	2,683	2,351	1,201	718	(482)	-40.2%
% District	93.9%	93.1%	81.1%	48.9%	38.7%		
% State	8.4%	9.5%	7.4%	3.7%	0.0%		
Other	44	81	75	1	3	2	245.0%
% District	1.7%	2.8%	2.6%	0.0%	0.2%		
% State	0.2%	0.3%	0.2%	0.0%	0.0%		
Proprietary	110	119	80	48	97	49	102.1%
% District	4.3%	4.1%	2.8%	2.0%	5.2%		
% State	0.4%	0.4%	0.3%	0.1%	0.3%		
Ventana			394	1,207	1,036	(171)	-14.2%
% District	0.0%	0.0%	13.6%	49.1%	55.9%		
% State	0.0%	0.0%	1.2%	3.7%	0.0%		
Orange Co / SD Total	2,538	2,883	2,899	2,457	1,855	(602)	-24.5%

VARIETAL TRENDS BY DISTRICT

OXNARD DISTRICT

Oxnard reported a 5.3% increase from 2005. The Camarosa variety continues to decrease, now comprising 12.8% of the district's acreage. This is being offset with plantings of Ventana and Proprietary varieties. Proprietary varieties dominate the district with 6,985 acres, an increase of 285 acres over the previous year. Ventana is the 2nd largest variety planted reporting 3,095 acres. Other varieties have increased slightly.

Oxnard	2002	2003	2004	2005	2006	change	% chng
Camarosa	4,780	4,031	3,304	1,767	1,526	(240)	-13.6%
% District	55.7%	45.8%	31.9%	15.6%	12.8%		
% State	16.9%	14.3%	10.4%	5.4%	4.5%		
Other	106	213	283	287	331	43	15.1%
% District	1.2%	2.4%	2.7%	2.5%	2.8%		
% State	0.4%	0.8%	0.9%	0.9%	1.0%		
Proprietary	3,696	3,841	4,768	6,700	6,985	285	4.3%
% District	43.1%	43.7%	46.1%	59.1%	58.5%		
% State	13.1%	13.6%	15.1%	20.5%	20.4%		
Ventana		709	1,994	2,580	3,095	514	19.9%
% District	0.0%	8.1%	19.3%	22.8%	25.9%		
% State	0.0%	2.5%	6.3%	7.9%	9.1%		
Oxnard Total	8,582	8,794	10,349	11,333	11,936	603	5.3%

SANTA MARIA DISTRICT

This district reported an increase of 993 acres compared to last year. Camarosa is still the primary variety despite a slight decrease in acreage. The Diamante variety decreased 239 acres, now comprising 22.6% of the district's acreage. Proprietary varieties total 16.2% of this district's acreage. Albion is at 878 acres, and comprises 12.1% of this district. Other varieties increased to 532 acres.

Santa Maria	2002	2003	2004	2005	2006	change	% chng
Albion					878	878	100.0%
% District					12.1%		
% State					2.6%		
Camarosa	2,474	2,134	2,901	2,567	2,550	(17)	-0.6%
% District	60.3%	48.1%	51.4%	40.8%	35.0%		
% State	8.8%	7.6%	9.2%	7.9%	7.5%		
Diamante	943	1,314	1,522	1,884	1,646	(239)	-12.7%
% District	23.0%	29.6%	27.0%	29.9%	22.6%		
% State	3.3%	4.7%	4.8%	5.8%	4.8%		
Other	73	86	108	359	532	173	48.1%
% District	1.8%	1.9%	1.9%	5.7%	7.3%		
% State	0.3%	0.3%	0.3%	1.1%	1.6%		
Proprietary	610	665	788	970	1177	207	21.3%
% District	14.9%	15.0%	13.9%	15.4%	16.2%		
% State	2.2%	2.4%	2.5%	3.0%	3.4%		
Ventana		239	328	513	503	(10)	-1.9%
% District	0.0%	5.4%	5.8%	8.1%	6.9%		
% State	0.0%	0.8%	1.0%	1.6%	1.5%		
Santa Maria Total	4,100	4,438	5,647	6,293	7,285	993	15.8%

VARIETAL TRENDS BY DISTRICT

WATSONVILLE/SALINAS DISTRICT

Watsonville/Salinas, still the largest producing district at 37.8% of the state's acreage, reported an increase of 660 acres. Propriety varieties lead the district with 39.2% or 5,055 acres. Diamante decreased 1,254 acres from 2005 to 4,379 acres in 2006. The Camarosa variety decreased slightly to 856 acres while the Ventana variety was not reported in the district this year, replaced by Albion comprising 1,917 acres.

Watsonville/Salinas	2002	2003	2004	2005	2006	change	% chng
Albion					1,917	1,917	100.0%
% District					14.8%		
% State					5.6%		
Camarosa	867	778	1,250	868	856	(12)	-1.4%
% District	7.7%	6.7%	10.2%	7.1%	6.6%		
% State	3.1%	2.8%	4.0%	2.7%	2.5%		
Diamante	5,427	6,113	6,003	5,631	4,378	(1,254)	-22.3%
% District	48.0%	52.3%	49.2%	46.0%	33.9%		
% State	19.2%	21.7%	19.0%	17.3%	12.8%		
Other	1,354	978	767	719	704	(15)	-2.1%
% District	12.0%	8.4%	6.3%	5.9%	5.5%		
% State	5.0%	3.5%	2.4%	2.2%	2.1%		
Proprietary	3,652	3,796	4,120	4,553	5,055	502	11.0%
% District	32.3%	32.5%	33.8%	37.2%	39.2%		
% State	12.9%	13.4%	13.0%	14.0%	14.8%		
Ventana			62	479		(479)	-100.0%
% District			0.5%	3.9%	0.0%		
% State			0.2%	1.5%	0.0%		
Wats./Salinas Total	11,301	11,687	12,201	12,250	12,910	660	5.4%