



Florida Citrus Outlook 2022-23 Season

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Florida Citrus Outlook

2022-23 Season

Introduction

This report provides supply, demand, and price projections of Florida citrus for the 2022-23 season. On Wednesday, October 12, 2022, the USDA's National Agricultural Statistics Service (USDA-NASS) released the 2022-23 Citrus Production Forecast for the Florida citrus crop by variety, which provides the baseline for these projections. This report examines the utilization of oranges, grapefruit, and specialty citrus, in accordance with industry trends. Projections include Florida orange juice (OJ) and grapefruit juice (GJ) pack, movement, and ending inventory, along with estimates of U.S. consumption and retail sales of OJ and GJ and preliminary on-tree price estimates. World OJ availability is presented, given its strong bearing on Florida's OJ situation. Fresh fruit movement projections are also included. Sensitivity analyses are provided to assess alternative scenarios for availability and movement, where appropriate.

The October citrus forecast for the 2022-23 Florida citrus season is 30.7 million boxes, an estimated 32% decline in total Florida citrus production of oranges, grapefruit, and tangerines. The forecast for total U.S. citrus production for the 2022-23 season indicates production will decrease overall by 10% with a total of 108.05 million boxes of oranges, grapefruit, lemons, and specialty citrus from California, Florida, Texas, and Arizona. Specifically, the October forecast projects 76.25 million boxes of oranges, 8.10 million boxes of grapefruit, and 23.70 million boxes of specialty tangerines and tangelos. The USDA forecast also anticipates California and Arizona will produce 24.150 million boxes of lemons in the 2022-23 season (USDA-NASS, 2022a).

The projections contained in this report rely on assumptions based on recent industry trends in production components, as well as trends in supply and demand for citrus products. Even a modest variation in these trends could substantially change forecast projections.¹

Review of the 2021-22 Florida Citrus Season

This section provides an overview of trends from the 2021-22 season that may impact the outlook for the 2022-23 season. The most significant events affecting the Florida 2022-23 citrus season are weather-related. The first event causing citrus damage was a freeze occurring over two days in late January 2022. Considerable grove acreage experienced significantly lower temperatures over long durations. The second significant event occurred when Hurricane Ian crossed through the majority of Florida's citrus producing regions on September 28, 2022. The full impact of Ian and the January 2022 freeze on the crop has yet to be fully assessed.

At the onset of the 2021-22 season, the Florida citrus industry continued its efforts towards recovery following a decade of significant decline in production and citrus availability associated with the harmful impacts of HLB. The September 2022 production results for the 2021-22 Florida citrus season was 45.13 million boxes of Florida oranges, grapefruit, and tangerines, an estimated 22% decline in total citrus production compared to production in the 2020-21 season. The October 2021 citrus forecast originally projected 51.7 million boxes of oranges, grapefruit, and tangerines. Valencia fruit drop, along with the freeze in early 2022, contributed to the overall decline in availability for the season.

The season ending USDA-NASS September 2022 estimate for the Florida round orange crop in the 2021-22 season, released in September 2022, was 41.05 million boxes, a decline of 11.9 million boxes, or 22% less than the previous season's crop of 52.95 million boxes. The decline

¹ USDA National Agricultural Statistics Service, Florida Field Office. "Citrus Production October Forecast" https://www.nass.usda.gov/Statistics_by_State/Florida/Publications/Citrus/

in production was associated with fewer bearing trees compared to the previous year along with fewer pieces of fruit per tree across all varieties. The drop rate declined for early-midseason oranges. The early-midseason orange fruit drop rate, excluding navels, was 39% compared to a 43% drop rate during the 2020-21 season. The drop rate for navel oranges was 28% compared to a 37% drop rate during the 2020-21 season and a 26% drop rate during the 2019-20 season. However, the drop rate for Valencia oranges was 51%, higher than the 41% drop rate during the 2020-21 season and a 30% drop rate during the 2019-20 season (USDA-NASS, 2022b).

A slightly smaller share of the overall Florida orange crop has been utilized by the processed sector in recent seasons when compared to historical data, with approximately 94% of total orange production made into either frozen concentrated orange juice (FCOJ) or single-strength orange juice (SSOJ), which is also referred to as not-from-concentrate (NFC) orange juice. Typically, processed utilization had represented between 95-96% of total orange production. The share of round orange boxes directly utilized for SSOJ was estimated at 34.36 million boxes in 2021-22. This share was 89% of total processed utilization, the highest NFC share in Florida processor history. However, this still represented a decrease of 9.3 million boxes from last season. The quantity of orange boxes utilized in 2021-22 to produce FCOJ is estimated at 4.19 million boxes, a decrease of 1.6 million boxes over last season's utilization of 5.8 million boxes, representing a further decline in the share of boxes of oranges utilized to produce FCOJ.

World availability of orange juice was down compared to the previous season as the leading OJ producing suppliers (Brazil, Mexico, and the United States) faced weather-related and other production challenges. The decline in availability in recent seasons has created uncertainty around the supply needed for processors to meet market demand for both NFC and concentrate orange juice. Preliminary aggregate OJ production from the three leading suppliers in 2020-21 was

projected at 2.43 billion SSE gallons, a decrease of 278.5 million SSE gallons (or down 10.3% from the previous season's 2.71 billion SSE gallons) largely due to the decline in juice yields and reduced orange production. Distribution of world orange juice production by the leading suppliers must also consider world demand for orange juice as the United States is only one of several markets. Even though there was a slight increase in the share of Brazil's exports to the United States in 2021-22, Brazil continued to be the leading source of orange juice in Europe. While the majority of U.S. orange juice production is consumed domestically, Brazil and Mexico orange juice production is primarily intended for the world market.

The USDA-NASS September 2022 estimate for the 2021-22 Florida grapefruit crop production was 3.33 million boxes, representing a decrease of 18.8% from the previous season's crop of 4.10 million boxes. Florida grapefruit production has declined by 92% since the 2003-04 season due to the harmful impacts of hurricanes and HLB. The September 2022 estimated production for the white grapefruit crop was 500,000 boxes, down 120,000 boxes from last season, and the red grapefruit crop was 2.83 million boxes, down 650,000 boxes from last season. Certified fresh grapefruit shipments were estimated to be 1.76 million boxes in 2021-22, down 6.8% from last season. Processed utilization is estimated at 1.53 million boxes, down 0.57 million boxes from last season. Utilization for frozen concentrated grapefruit juice (FCGJ) is estimated at 0.20 million boxes in 2020-21, down 0.11 million boxes from last season. Single-strength grapefruit juice, or NFC GJ, is projected to account for 1.33 million boxes, down 0.46 million boxes from last season.

Total movement of grapefruit juice from Florida-based processors in 2021-22 was estimated to reach 16.21 million SSE gallons, a slight decline over previous season, but an increase in domestic movement over the previous season with stable demand at retail for NFC GJ. The increased movement continued to alleviate some of the surplus NFC GJ inventories. By the end of

the 2021-22 season, Florida's ending GJ inventory was estimated at 12.66 million SSE gallons (or 43 weeks of supply).

Florida's certified fresh grapefruit utilization accounted for approximately 52.8% of total grapefruit production during the 2021-22 season. Certified fresh grapefruit shipments in 2021-22 were 1.76 million boxes, representing a decline of 129,095 boxes compared to the previous season. The domestic share of these fresh shipments has increased in recent years from around 42% annually to a 74% share of all Florida fresh grapefruit shipments. As such, domestic fresh grapefruit shipments were up by 155,462 cartons with 2.60 million cartons. Florida exported 915,902 cartons of certified fresh grapefruit during the 2021-22 season, representing a decline of 413,655 cartons over last season. Florida fresh grapefruit was shipped to various export markets in Asia, Europe, and Canada.

The preliminary estimate for the 2021-22 Florida specialty citrus crop production is 750,000 boxes, a decrease of 140,000 boxes from last season. Despite higher freight on board (FOB) prices in recent years, specialty production has declined more than 90% since the 2009-10 season. Specialty citrus includes tangelos, Royal tangerines (formerly known as Temple oranges), early tangerine varieties, honey tangerines, Autumn Honey, Juicy Crunch, Orri, Roe, Tango, and other minor tangerine varieties. Florida certified shipments are estimated to be about 65% of the crop with 484,000 boxes (equivalent to 968,000 cartons) moving during the 2021-22 season, primarily to the domestic market.

The Florida citrus industry continues to be in a state of recovery following several years of decline, including dealing with higher production costs, reduced overall tree replant rates, and annual declines in fruit availability that have had irremediable impacts on industry infrastructure. As consumers continue to indicate a renewed awareness of the health and wellness benefits of

citrus in recent months, the recovery of the industry is crucial to meet both short-term and long-term demand.²

Florida Orange Crop, Utilization and Movement

This section provides an overview of world orange production and utilization trends that may impact the Florida citrus industry outlook during the 2022-23 season. Table 2 provides estimates of the orange utilization and outlook of the leading suppliers of orange juice on the world market, namely Brazil, Mexico, and the United States. Total combined orange production in the United States, Brazil, and Mexico are expected to increase by 4.1% with the United States, Brazil, and Mexico expected to produce approximately a combined 565 million 90-lb equivalent boxes in the 2022-23 season.

Specifically, the United States is expected to produce 71 million 90-lb equivalent boxes, Brazil is expected to produce 409.1 million 90-lb equivalent boxes, and Mexico is expected to produce an estimated 84.9 million 90-lb equivalent boxes in the 2022-23 season. The data suggests that approximately 65.7% of production in these countries will be utilized for processing, a projected 10.8% increase over last season. The remainder of this section looks specifically at utilization within each country.

Florida

The USDA-NASS October forecast for the 2022-23 Florida round orange crop is 28.0 million boxes, which would represent a decline of 31.8%, or equivalent to 13.1 million boxes compared to last season's crop of 41.1 million boxes. Table 1 reports Florida orange utilization. The 2022-23 early and mid-season orange crop forecast, including Navel oranges, is 11 million

² At the time of this writing, the full impact of Hurricane Ian had not yet been assessed and is to be considered the most significant event that will adversely affect the Florida 2022-23 citrus season.

boxes, down 7.3 million boxes (or a decline of 39.7%) from last season. The navel orange crop is forecasted at 300,000 boxes, representing 2.7% of the total early and mid-season orange crop estimate. The Valencia crop is forecasted at 17 million boxes, a projected 25.4% decrease over last season's Valencia production of 22.8 million boxes.³

This Outlook assumes that approximately 94% of orange production will be utilized in the processed market. The number of round orange boxes directly utilized for single-strength orange juice (SSOJ), which is used to make not-from-concentrate (NFC) orange juice, is estimated at 23.67 million boxes (or 90.0% of total processed utilization) in the 2022-23 season, a decrease of 10.69 million boxes from last season. The quantity of orange boxes utilized in 2022-23 to produce FCOJ is estimated at 2.63 million boxes, a decrease of 1.56 million boxes over last season's utilization of 4.19 million boxes. Certified fresh orange shipments in 2022-23 are estimated at 1.59 million boxes, down 34.9% from the 2.45 million boxes shipped last season. Florida's processed orange utilization is estimated at 26.30 million boxes, a decrease of 31.8% over last season's utilization of 38.55 million boxes.

The total juice yield for Florida processed production is roughly estimated to be 4.144 SSE gallons per box for the 2022-23 season based on an evaluation of currently available production and movement data, as well as the forecast components reported in the USDA forecast. An overview of historical juice yields is reported in Table 4.

São Paulo

Brazil is the leading exporter of orange juice in the world with most of its production reaching markets in Europe, North America, and Asia. Orange production in the State of São Paulo, where most of Brazil's oranges used for processing are grown, increased by roughly 23%

³ One Florida orange box weighs 90-lb.

over the previous season from 224.4 million 90-lb equivalent boxes to 277 million 90-lb equivalent boxes, an increase of 52.5 million boxes. The current estimates for the São Paulo orange crop, as reported by Fundecitrus, are found in Table 3. Juice yield for São Paulo production is estimated to be 5.299 SSE gallons per box for the 2022-23 season (Fundecitrus, 2022). An overview of historical juice yields is reported in Table 4.

Mexico

Mexico is the second leading exporter of orange juice. The share of its orange production into the processing sector and its exports has increased incrementally in recent seasons in response to declines in world orange juice supplies. Although a net exporter of orange juice, orange production in Mexico is primarily intended for consumption in the fresh, domestic market. However, favorable prices and supply shortages in the United States over the last decade continue to displace fresh utilization in favor of the processed export market. Between 80 to 83 percent of Mexican exports are destined for the U.S. market. The packout rate for fresh oranges declined marginally each season, with supplies diverted to processed utilization. The orange fruit processing period in Mexico, from October through April, overlaps Florida's. While most of the processed utilization goes into FCOJ, with Mexico producing mainly Valencia varieties for processing, NFC production has increased incrementally each season.

Over the last four seasons, production has been inconsistent due to inclement weather and other unknown factors. Mexico experienced extreme weather conditions in 2021, impacting the available crop. Without official estimates, this Outlook considers recent trends in production and review information from industry sources. Final estimates rely on the USDA Foreign Agricultural Service (FAS) production, supply, and demand data and are to be considered approximations. The estimates for the Mexico orange crop, found in Table 3, are based on the most current data through

the 2021-22 season reported by USDA-FAS. Processed orange production in Mexico is expected to decrease by roughly 10% over the previous season from 41.6 million 90-lb equivalent boxes to 37.5 million 90-lb equivalent boxes, a reduction of 4.2 million boxes. Juice yield for Mexico production is roughly estimated to be 5.685 SSE gallons per box for the 2022-23 season and is based on an evaluation of currently available production and movement data provided by USDA-FAS. An overview of historical juice yields is reported in Table 4.

Other U.S. Orange Production

Other U.S. oranges come primarily from California and Texas with utilization primarily intended for fresh consumption. Typically, about 80-85% of California and Texas oranges are intended for the fresh market. However, in recent years, processed share has increased. During the 2019-20 season, California fresh utilization was estimated at 80% and Texas fresh utilization was estimated at 74%, with the remainder going into processed. During the 2020-21 season, California fresh utilization was estimated to decline to a 74% share with Texas fresh utilization hovering around a 76% share, with the remainder going into processed. During the 2021-22 season, California fresh utilization was estimated at 81% share with the share of Texas fresh orange utilization at 58% due to a smaller crop following the February 2021 freeze.

According to the USDA-NASS citrus production forecast for the 2022-23 season, California is expected to produce 38 million 80-lb boxes of non-Valencia type oranges and 9.1 million 80-lb boxes of Valencia oranges for a total of 47.1 million boxes of oranges, an increase of 16.6% over the previous season. As many as 10.2 million boxes are estimated to be processed into juice based on previous utilization rates. The USDA-NASS citrus production forecast for Texas orange production in the 2022-23 season is estimated to increase by 475% to 1.15 million 85-lb boxes, following a post-freeze recovery. The Texas crop share into processed utilization

could represent as many as 307,000 85-lb boxes. This analysis estimates that as many as 9.4 million 90-lb Florida equivalent boxes of California and Texas combined production may be used in processing orange juice. The share of single-strength and concentrate is not reported by either state. This analysis projects that orange juice production may increase by approximately 35.2% from an estimated 38.3 million SSE gallons of orange juice in the 2021-22 season to 51.8 million SSE gallons in the 2022-23 season.

Orange Juice Production and Availability

This section describes potential orange juice (OJ) availability on the domestic market by evaluating world production, inventories, and movement. Orange juice production and availability are key measures in sustaining the demand for Florida citrus products over the long run. Table 5 provides estimates of comparative juice production from Florida, Brazil, and Mexico based on their respective production seasons. For the 2022-23 Florida season, estimated total supply of orange juice on the world market is projected to increase by 9.4% over the previous period from 1.63 billion SSE gallons to 1.78 billion SSE gallons due to increased availability in production from leading suppliers, such as Brazil, Mexico, and the United States despite the production losses in Florida (Table 5). Florida orange juice production is estimated to contribute 6.3% of orange juice to this total supply this season compared to 12% the previous season.

Global trade fluctuates in accordance with the changes in supply. As such, USDA-FAS reports global consumption will be higher with the increase in Brazil's production this season. Yet, the U.S. and Brazil will also use existing inventory to meet current demand. While a majority of orange juice is produced in Brazil, Mexico is the leading supplier of FCOJ to the U.S. market. In recent seasons, both countries have emerged as competitive suppliers of NFC orange juice to the United States, as well.

Comparisons of beginning inventories and production levels of orange juice for Florida, São Paulo, and Mexico are provided in Table 6. Aggregate OJ production from the three leading suppliers in 2022-23 is projected at 2.19 billion SSE gallons, a reduction of 235.5 million SSE gallons (or down 9.7% from last season's 2.43 billion SSE gallons) largely due to the decline in juice yields and reduced orange production. World orange juice production must also consider world demand for orange juice stocks as the United States is only one of several markets for the leading suppliers. While the vast majority of U.S. orange juice production is consumed domestically, São Paulo and Mexico orange juice production is primarily intended for the world market. The share among Brazil and Mexico export markets for orange juice are reported in Tables 7 and 8, respectively.

Based on Brazilian Department of Foreign Trade (SECEX) data, an estimated 1.41 billion SSE gallons of OJ were exported from Brazil in 2021-22, down 5% from the 1.49 billion SSE gallons exported in 2020-21. Most of Brazil's orange juice exports are bound for Europe, with shipments to Europe during the 2021-22 season at an estimated 889.2 million SSE gallons (and representing approximately 63% of all exports), an estimated 8.2% decline over the previous season. Most of Brazil's exports to Europe are frozen concentrate, representing 75% of the total in 2021-22. However, it is worth noting that exports of NFC OJ are on the rise each season. A portion of Brazil's OJ sent to Europe may be re-exported to other markets. Brazil's OJ exports to East Asia were up by 14% with 164.3 million SSE gallons. Brazil's exports to North American (USMCA) countries were up by 18.4% with 283.1 million SSE gallons, intended primarily for the U.S. market to meet a demand that is currently outpacing domestic supply. A declining share, approximately 43%, of these exports in the 2021-22 season were frozen concentrate, which is used to make

reconstituted, shelf stable, and frozen concentrated orange juice, signaling a rise in the NFC export market to USMCA.

Based on U.S. Customs import data, an estimated 164 million SSE gallons of orange juice were exported from Mexico in 2021-22, an increase of 18% from the 138.8 million SSE gallons imported in the 2020-21 season. It is estimated that approximately 86% of Mexico's orange juice exports are bound for the United States⁴ with reported shipments expected to increase with the decline in Florida's production. While most of the Mexico's orange juice exports to the United States are frozen concentrate, an increasing share of NFC has been used to offset the decline Florida production. A review of U.S. orange juice imports by type of juice and origin are reported in Table 8 of this report.

Florida Orange Juice Inventory and Movement

Both demand-side and supply-side factors affecting orange juice availability are analyzed in this section. The 2022-23 Florida citrus season will experience further declines in orange production which can be attributed to weather-related events in 2022. Concurrently, consumer demand for orange juice outpaced juice receipts from the Florida crop and imports during the previous season, ensuring that existing inventories would be needed. In addition, the Florida OJ situation continues to be affected by the reduced production levels largely associated with the spread of Huanglongbing (HLB, also known as citrus greening).

Preliminary projections for the Florida OJ situation (October-September season) are shown in Table 9. Florida's OJ imports are based on aggregate Florida-Brazil-Mexico OJ availability and

⁴ Estimated share of Mexico's orange juice exports to the U.S. are based on access to Mexico National Institute of Statistics via Trade Data Monitor.

adjusted for Florida processor trends. Three scenarios for 2022-23 are provided, varying with respect to Florida processor imports.

The 2021-22 Florida citrus season concluded with a year-over-year reduction in SSOJ and FCOJ inventories from the previous season. Combined Florida OJ ending inventory for the 2021-22 season is 214.3 million SSE gallons or 16.8 weeks of supply, compared to 28.5 weeks in the previous 2020-21 season. Adding the 2021-22 ending inventory to the 2022-23 estimate of Florida OJ production of 112.1 million SSE gallons, plus an estimated imports and other adjustments totaling 468.7 million SSE gallons, Florida's OJ availability in 2022-23 (October 2021 through September 2022) is estimated at 795.1 million SSE gallons, down 103.6 million SSE gallons (or 11.5%) from last season's level. Total movement in 2021-22 is estimated to decline by 78.8 million SSE gallons (or 11.5%) to 605.6 million SSE gallons from last season. By the end of the 2022-23 season, Florida's OJ ending inventory is estimated to decline to 189.5 million SSE gallons (or 16.3 weeks of supply) associated with a decline in availability.

Import quantities will most likely be influenced by actual production, movement, and availability from non-Florida sources observed during the 2022-23 season. Holding all trends constant and considering alternate import scenarios where OJ imports are 10% higher and 10% lower than discussed in the previous paragraph, ending inventories would range from 145 million SSE gallons (12.5 weeks supply) to 234 million SSE gallons (20.1 weeks supply). Estimates of Florida's inventory, production, and movement levels for FCOJ and NFC, underlying the total OJ estimates in Table 9, are shown in Table 10 and Table 11.

This analysis assumes approximately 10% of Florida processed orange utilization will be processed as FCOJ during the 2022-23 season. Beginning Florida processor inventories of FCOJ for the 2022-23 season totaled 122.2 million SSE gallons, down by more than 100 million SSE

gallons (or 46%) compared to a year ago. Florida processor FCOJ production is estimated at approximately 10.8 million SSE gallons, based on an estimated utilization of 2.63 million boxes of round oranges and an average FCOJ juice yield of 4.10 gallons per box in 2022-23 season. Imports of FCOJ, which is used to make Recon, shelf stable, and frozen orange juice are projected to increase by 59% to 294.6 million SSE gallons. Total overall FCOJ availability is projected to decline by 2.1% when compared to the 2022-23 season. Total movement is projected to increase by at least 1.6% as a result of an increase in the use of FCOJ to blend with NFC to meet market demands. Based on the estimated utilization, receipts, and movement trends, FCOJ ending inventories are projected to further decrease by the end of the season to approximately 108.2 million SSE gallons (or 17.6 weeks of supply).

This analysis assumes that approximately 90% of Florida processed orange utilization during the 2022-23 season will be processed as SSOJ, which is used for NFC orange juice. At the onset of the 2022-23 season, the beginning Florida processor inventories of SSOJ were 94.8 million SSE gallons (13.7 weeks supply), a decrease of 23.9% when compared to the previous season. Florida processor SSOJ production is estimated at approximately 101.4 million SSE gallons based on an estimated utilization of 23.67 million boxes of round oranges and an average juice yield of 4.28 SSE gallons per box, which would be a decrease of 40.1% compared to the juice pack from Florida oranges last season. Imports and domestic receipts of SSOJ are projected to increase by 9% to 141.6 million SSE gallons. At the same time, total overall SSOJ availability is projected to decline by 17.3% when compared to the 2021-22 season. Total movement, including EVAP into Recon⁵, is projected to decline by at least 17.3% with a majority of SSOJ consumed through retail channels. Based on the estimated utilization, receipts, and movement trends, SSOJ

⁵ EVAP refers to frozen concentrated orange juice reconstituted into single-strength orange juice.

ending inventories are projected to decrease by the end of the season to approximately 78.7 million SSE gallons (or 15.3 weeks of supply).

U.S. Orange Juice Supply, Disappearance and Retail Sales

Disappearance is used in this analysis to discuss orange juice availability to meet demand. Presumed consumption is a rough measure of market performance reflecting orange juice movement in which the disappearance of orange juice from measurable data is calculated as the sum of 1) beginning U.S. inventory, 2) Florida and other U.S. production, and 3) U.S. imports minus 1) U.S. exports and 2) ending U.S. inventory.

U.S. ending inventories for OJ consider Florida processor ending inventories and the USDA-NASS cold storage survey report. Cold storage stocks are updated monthly. A preliminary estimate of total U.S. OJ disappearance is projected at 708.6 million SSE gallons for the 2022-23 season, a projected decline of 2.3% from an estimated 725.1 million SSE gallons consumed in the previous season (Table 12). The projected reduction in consumption reflects a both a contraction in supply on the domestic market and tempered demand during a period of high inflation compared to the 2020-21 season. Total U.S. OJ production is estimated at 163.4 million SSE gallons based on the preliminary USDA estimated for the orange crop in Florida, California, and Texas (NASS-USDA, 2022a). Total U.S. OJ imports are projected at around 533 million SSE gallons, a projected increase of 28.7% over the previous season. The projected increase in total U.S. imports may reflect the demand to compensate for declining production. U.S. exports are projected at 30.8 million SSE gallons, a 21.5% decrease over last season.

By comparison, Florida processor orange juice receipts, movement, and net change in inventory are reported in Table 13. Net from Florida fruit refers to the orange juice production from Florida-sourced oranges in each season which is compared to receipts of 100% orange juice

from imported sources, domestic sources, and non-reporting Florida facilities. Movement is reported as domestic packaged and bulk movement as well as exports. During the 2022-23 Florida citrus season, Florida orange production is projected to account for 37% of SSOJ and 4% of FCOJ receipts by processors, respectively. Specifically, Florida processors are expected to receive 101.4 million gallons of SSOJ from Florida production and 174.2 million gallons from other sources. Florida processors are expected to receive 11.7 million gallons of FCOJ from Florida's orange crop with the remaining 294.4 million gallons from other sources. The majority of SSOJ movement from Florida processors is packaged, whereas the majority of FCOJ movement occurs as bulk movement for packaging out of state. It is estimated that between 63-68% of orange juice from Florida movement is consumed through retail channels with the remainder consumed as foodservice and institutional demand.

The Nielsen Topline Report provides more exact measures across retailers, but with abridged market coverage. The Florida Department of Citrus (FDOC) purchases Nielsen retail outlet data for OJ sales in grocery stores with annual sales of at least \$2 million, drug stores with annual sales of at least \$1 million, mass merchandisers, such as Wal-Mart, club (Sam's and BJ's), dollar stores (Dollar General, Family Dollar, and Fred's), and military/DECA. The following analysis is based on the Nielsen retail universe Expanded All Outlets Combined (xAOC) data described above. The average price of orange juice and OJ volume sales at retail during the 2022-23 season will be largely dependent upon juice availability, market growth/contraction, and substitutes not yet known. Retail sales are estimated assuming consumer behavior during 2022 will carry forward into the 2022-23 season amid consumer concerns over high inflation in the economy. It is also assumed that supply constraints will not be apparent until later in the season

and well into next season. Estimates with a sensitivity analysis are provided for three price scenarios in Table 14.⁶

Scenario 1 (middle or base price): Overall retail OJ price is projected to increase from \$7.91 per gallon in 2021-22, to \$8.36 per gallon in 2022-23, a 5.7% increase in retail price. Retail prices could increase by as much as 7% if inflation persists. The increase in prices is also attributed to an expected reduction in promotional activity. In addition to its own price, the demand for OJ depends on levels of OJ advertising and promotion, consumer income, attitudes and perceptions, and competition from other beverages through prices and advertising/promotion levels of these beverages, as well as other factors.

Retail sales of orange juice, in terms of equivalent gallon sales, are projected to decline based on increased prices and somewhat declining distribution. OJ sales in Nielsen retail outlets are estimated at about 389.5 million equivalent gallons in 2022-23, down 4.4% from last season's sales of 407.5 million SSE gallons based on the average price of \$8.36 per equivalent gallon. Estimates of sales by segment (FCOJ, NFC, and RECON) are also shown in the table. The preceding estimates represent a 51% NFC market share of OJ category market sales volume, RECON market share estimated at 42% of total OJ category market sales volume, FCOJ market share estimated at 3.6% of total OJ category market sales volume, and remaining share of total volume allocated to shelf stable. The shift in the share of retail volume from NFC to Recon accounts for the significant decline in NFC OJ volume movement due to changes in processing methods by some suppliers.

Orange juice that is sold on trade promotion at retail has been at historically low levels the last couple of years, contributing to the increase in the average price. The share of orange juice

⁶ Retail market forecasts prepared by Yan Heng, Ph.D., Assistant Research Scientist, Food and Resource Economics Department, University of Florida

sold on promotion with corresponding price per equivalent gallon is reported in Table 15. Nielsen collects promotional information from retailers, known as trade promotions, which are compiled into four categories in the FDOC Nielsen custom database. The key promotional items are 1) feature items, 2) display items, 3) a combination of both feature and display, and 4) temporary price reductions (also known as price decrease). The FDOC Nielsen custom database provides periodic updates on the share of retail sales sold with and without promotions. Feature items are retailer specific promotions, such as print ads and coupons from retailers. Displays must be set in a secondary selling location and showcase a product in high traffic areas that consumers can pick up and purchase. A display must be temporary for Nielsen to recognize as a display. A promotion that combines elements of features and displays are tracked separately. Finally, a common trade promotion is a temporary price reduction. Price decreases must be at least five percent lower than regular price. If the lower price persists over seven consecutive weeks, Nielsen will consider the reduced price as the new regular price and will no longer record the item as sold on promotion (source: NielsenIQ).

The reporting of promotional activity increased slightly during the 2021-22 season with an analysis of trade promotions revealing that 25.4% of total orange juice sold during the 2021-22 season was sold on promotion. NFC and Recon orange juice sales sold on promotion accounted for 27.7% and 24.3%, respectively, of volume movement. The average price of orange juice sold on trade promotion during the 2021-22 season was \$7.26 per equivalent gallon compared to a no promo price of \$8.13 per equivalent gallon.

Florida Fresh Orange Shipments, by Market

Florida fresh certified shipments are reported in Table 16. Certified fresh orange utilization is projected to account for approximately 5.7% of total orange production during the 2022-23

season. As such, certified fresh orange shipments in 2022-23 are estimated at 1.59 million boxes (equivalent to 3.19 million cartons), which would be a decrease of 34.9% from the 2.45 million boxes (equivalent to 4.89 million cartons) of Florida fresh certified orange production in the 2021-22 season. Domestic fresh orange shipments are projected at 3.06 million cartons, down by nearly 1.66 million cartons. The domestic share is projected to be about 96% of all Florida fresh orange shipments in 2022-23. Florida packers are projected to export roughly 122,380 cartons of fresh oranges during the 2022-23 season, representing a decline of 28.1% compared to last season. Furthermore, Canada is expected to be the leading export destination of Florida fresh oranges, accounting for 89% of all exports.

Florida Grapefruit Crop, Utilization and Movement

The USDA-NASS October estimate of the Florida grapefruit crop in 2022-23 is 2.0 million boxes, a decrease of 40% from last season's crop of 3.33 million boxes (Table 17). Florida grapefruit production has suffered losses of more than 95% since the 2003-04 season due to the harmful impacts of hurricanes and HLB. Certified fresh grapefruit shipments are estimated to be 1.02 million boxes in 2022-23, which would represent a decline of about 42% compared to certified fresh utilization last season. Non-certified utilization is forecasted at 50,000 boxes in 2022-23. Processed utilization is projected to account for approximately 47% of the total crop and is estimated at 0.93 million boxes, a decline of about 39.1% compared to the 2021-22 season. This outlook assumes that utilization of the processed grapefruit crop into single-strength grapefruit juice (SSGJ), which is used to make NFC grapefruit juice, is expected to account for 91% of processed utilization with an estimated 0.85 million boxes used this season, which represent a decrease of about 36.2% compared to last season. Utilization of the processed grapefruit crop into

frozen concentrated grapefruit juice (FCGJ) is estimated at 83,700 boxes in 2022-23, down 115,935 boxes from last season.

Florida Grapefruit Juice Inventory and Movement

Florida processors began the 2022-23 season with 12.66 million SSE gallons of GJ in inventory (equivalent to 42.9 weeks supply), down from the previous season's level of 16.90 million SSE gallons (55.6 weeks supply based on average movement at that time) (Table 18). Combined GJ production plus processor imports, domestic and foreign, in 2022-23 is estimated at 10.03 million SSE gallons, down 3.04 million SSE gallons from last season. Combining production with beginning inventories, GJ availability in 2022-23 is estimated at 22.7 million SSE gallons, down by 24.3% and representing a decrease of 7.28 million gallons from last year. GJ movement in 2022-23 is estimated at 15.31 million SSE gallons, down 5.5% from last year. The 2022-23 ending inventory for Florida GJ is estimated at 7.38 million SSE gallons (or 25.1 weeks supply). Table 18 also describes the availability, movement, and inventory estimates for FCGJ and SSGJ projected for the 2022-23 season.

Florida processors are projected to utilize 91% of processed grapefruit for SSGJ (i.e., NFC GJ). Beginning inventory of SSGJ for the 2022-23 season is down by 18.1% over the previous season at 8.45 million SSE gallons (34.58 weeks supply). Production from Florida fruit is estimated at 4.56 million SSE gallons based on an estimated 0.85 million boxes of grapefruit and juice yield 5.390 SSE gallons per box, representing a 37.1% decrease in pack from fruit over the previous season. Florida processors are projected to utilize 9% of processed grapefruit for FCGJ. Beginning inventory of FCGJ for the 2022-23 season is down by 36% over the previous season at 4.21 million SSE gallons (51.85 weeks supply). Production from Florida fruit is estimated at 0.43 million SSE gallons based on an estimated 83,700 boxes of grapefruit and juice yield 5.087 SSE

gallons per box, representing a 58.1% decrease in pack from fruit over the previous season. Exports of in 2022-23 are estimated at 0.40 million SSE gallons based on analysis of Florida processor statistics and industry sources. In some seasons, the level of GJ exports reported by the Florida citrus processors has exceeded the level reported by the U.S. Department of Commerce. The U.S. Department of Commerce data are tracked to provide an indication of market shares across export destinations.

U.S. Grapefruit Juice Supply, Disappearance, and Retail Sales

U.S. disappearance of GJ is estimated at 21.2 million SSE gallons in 2022-23, compared to 29.31 million SSE gallons in the previous season (Table 19). Disappearance is expected to decline by 28% between 2022-23 season and the 2022-23 seasons. However, this may exclude some cold storage supplies not tracked within the FDOC Florida processor database or by USDA cold storage estimates. Total U.S. GJ production is estimated at 15.21 million SSE gallons, based on Florida processors data and the USDA forecast of the grapefruit crop in California and Texas. The projected decline in disappearance for the 2022-23 season is consistent with the decline in availability coupled with declining market growth prior to the pandemic. Total U.S. GJ imports are estimated at 5.12 million SSE gallons, an increase of 33% over the previous season. U.S. exports are projected at 5.01 million SSE gallons based on analysis of Florida processor statistics.

Other U.S. grapefruit come primarily from California and Texas, with utilization intended for both fresh and processed consumption. According to the USDA-NASS citrus production forecast for the 2022-23 season, California is expected to produce 4.1 million 80-lb boxes of grapefruit, unchanged from last season. Approximately 1.08 million boxes are estimated to be processed into juice this season based on previous utilization rates. The USDA-NASS citrus production forecast for Texas grapefruit production in the 2022-23 season is estimated to rebound

following the freeze in 2021 and is expected to increase by 17.6% to 2.0 million 80-lb boxes. The Texas crop share into processed utilization could represent as many as 940,000 80-lb boxes. This analysis suggests that as many as 1.9 million 85-lb Florida equivalent boxes of California and Texas combined production may be used in the processing of grapefruit juice. The share of single-strength and concentrate is not reported by either state. This analysis projects that grapefruit juice production may decrease by approximately 26.7% from an estimated 14.0 million SSE gallons of orange juice in the 2021-22 season to 10.2 million SSE gallons in the 2022-23 season with the inclusion of Florida production.

In addition to GJ prices, retail sales of GJ during the 2022-23 season may be constrained by declines in distribution, substitutes, and decline in promotion. Estimates are provided for three price scenarios. Nielsen retail sales of GJ are projected to decrease from 11.41 million SSE gallons to 10.90 million SSE gallons, assuming a 4.8% increase in price for the overall price of GJ from \$9.73 to \$10.20 per SSE gallon from last year (middle scenario) (Table 20). Estimates of sales by segment (FCGJ, NFC, and RECON) are also shown in Table 20. The estimated sales reflect market share of NFC GJ will be 73% of retail sales volume, Shelf Stable market share estimated at 21% of retail sales volume, FCGJ market share estimated at 4% of retail sales volume, and remaining shares allocated to Recon GJ. Even prior to the pandemic, grapefruit juice sold on promotion has been on the decline. The share of grapefruit juice sold on promotion with corresponding price per equivalent gallon is reported in Table 21.

Grapefruit juice selling on promotion at retail, like orange juice, has been historically low, and this is contributing to an increase in the average reported price. The share of grapefruit juice sold on promotion with corresponding price per equivalent gallon is reported in Table 21. Nielsen collects promotional information from retailers, known as trade promotions, which are compiled

into four categories in the FDOC Nielsen custom database. The key promotional items are 1) feature items, 2) display items, 3) a combination of both feature and display, and 4) temporary price reductions (also known as price decrease). The FDOC Nielsen custom database provides periodic updates on the share of retail sales sold with and without promotions. Feature items are retailer specific promotions, such as print ads and coupons from retailers. Displays must be set in a secondary selling location and showcase a product in high traffic areas that consumers can pick up and purchase. A display must be temporary for Nielsen to recognize as a display. A promotion that combines elements of features and displays are tracked separately. Finally, a common trade promotion is a temporary price reduction. Price decreases must be at least five percent lower than regular price. If the lower price persists over seven consecutive weeks, Nielsen will consider the reduced price as the new regular price and will no longer record the item as sold on promotion (source: NielsenIQ).

The share of grapefruit juice sold on promotion with corresponding price per equivalent gallon is reported in Table 21. The reporting of promotional activity declined considerably during the pandemic, which may have been due to multiple factors. The most critical was the inability of Nielsen in-store data dispatchers to coordinate with retailers. Another reason behind the reduction in activity is due to supply chain coordination. An analysis of trade promotions reveals that for total refrigerated grapefruit juice sales, the share of gallons sold on promotion has declined from 38.3% during the 2018-19 season to 28.6% during the 2021-22 season. Sales of shelf stable grapefruit juice sold on promotion fell from 10.9% during the 2018-19 season to 5.2% during the 2021-22 season. The average price of grapefruit juice sold on trade promotion during the 2021-22 season was \$8.64 per equivalent gallon compared to a no promo price of \$10.06 per equivalent gallon.

Fresh Grapefruit Shipments, by Market

Florida fresh certified grapefruit shipments are reported in Table 22. Certified fresh grapefruit utilization is projected to account for approximately 51% of total grapefruit production during the 2022-23 season. Certified fresh grapefruit shipments in 2022-23 are currently estimated at 1.02 million boxes (equivalent to 2.04 million cartons, which would represent a decline of 42% compared to last season. Domestic fresh grapefruit shipments are projected at 1.29 million cartons, which would represent a decline of 50.6% compared to last season. The domestic share has increased in recent years from around 42% annually to a 63% share of all Florida fresh grapefruit shipments. Export shipments are projected at 750,000 cartons of fresh grapefruit during the 2022-23 season, representing a decline of 18% compared to last season. Certified Florida fresh exports represent 37% of fresh shipments. Florida fresh grapefruit is shipped to various export markets in Asia, Europe, and Canada. Accounting for an estimated 334,814 cartons, the top markets for Florida certified fresh grapefruit are Japan and Korea (ROK). Europe is projected to receive approximately 295,066 cartons of fresh Florida grapefruit, and Florida fresh packers are expected to ship approximately 124,919 cartons to Canada, accounting for 6% of total exports and 23% decline compared to the previous season.

Florida Specialty Crop and Utilization

The USDA-NASS October estimate of the Florida specialty crop in 2022-23 is 700,000 boxes, a decrease of 50,000 boxes from last season (Table 23). Despite higher FOB prices in recent years, specialty production has declined more than 90% since the 2003-04 season. The USDA-NASS preliminary estimate of specialty citrus includes tangelos, Royal tangerines (formerly

known as Temple oranges), early tangerine varieties, honey tangerines, Autumn Honey, Juicy Crunch, Orri, Roe, Tango, and other minor tangerine varieties. Temples were classified and reported as early-midseason oranges between the 2005-06 and 2015-16 seasons. Florida certified shipments are estimated to be about 58% of the crop with an estimated 406,000 boxes (equivalent to 812,000 million cartons) moving during the 2022-23 season to primarily the domestic market, down by 64,521 cartons (Table 24). The domestic share typically represents close to 97% of annual shipments. Florida packers are projected to export approximately 23,034 cartons of fresh specialty fruit during the 2022-23 season, representing an increase of 5,965 cartons over last season. Accounting for 69% of exports, Canada would be the leading destination of Florida fresh specialty.

Summary: Implications for the Florida Grower

The October citrus forecast for the 2022-23 Florida citrus season suggests Florida citrus production will drop by 32% to 30.7 million boxes of oranges, grapefruit, and tangerines. The forecast also reports total U.S. citrus production for the 2022-23 season will decrease overall by 4% with a total of 129.20 million boxes of oranges, grapefruit, lemons, and specialty citrus from California, Florida, Texas, and Arizona. Specifically, the October forecast projects 76.26 million boxes of oranges, 8.1 million boxes of grapefruit, 20.7 million boxes of specialty tangerines and tangelos, and 24.15 million boxes of lemons.

The decline in production will likely serve to increase imports, prices, and reduce returns to growers. At the same time, the demand for Florida citrus products, which remained stable during 2022 as many consumer-shopper trends which had emerged during 2020 carried through the 2021-22 season, is expected to outpace supply. Despite an overall decline in world availability of citrus,

total grower returns are expected to decline with the reduced crop, weather-related impacts, and higher production costs.

The USDA-NASS October forecast for the 2022-23 reports that Florida production of round oranges will be 28 million boxes, production of grapefruit crop will be 2 million boxes, and production of specialty tangerines will be 700,000 boxes.

Florida processed utilization of oranges and grapefruit will decline with the decrease in production, but at least 90% of the processed share will be used to make NFC juices. While overall movement of juice is expected to decline, movement is expected to be consistent with Florida availability and supplies.

Early projections for the 2022-23 Florida citrus season reveal a steady demand for fresh and processed citrus products amid an expected decrease in overall availability. At the same time, demand of both fresh and processed citrus is tenuous as consumers face tough decisions amid high inflation. As such, it is vital for the Florida citrus industry to stay the course in its efforts to ease harmful impacts to grower and processor returns due to severe multi-weather events in 2022 by alleviating higher production costs, increasing overall tree replant rates, and protecting and revitalizing industry infrastructure.

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TABLES

Table 1. Utilization of Florida round oranges.

Season	Certified ^a Fresh	FCOJ ^b	SSOJ ^b	Certified ^a Processed	Non- Certified ^c Fresh	Other	Total
millions 90-lb boxes							
2002-03	6.28	98.72	92.51	193.29	3.44	2.06	203.00
2003-04	6.16	137.50	93.39	232.34	3.74	1.22	242.00
2004-05	4.90	52.18	88.51	142.36	2.49	1.71	149.80
2005-06	4.53	49.11	90.17	140.46	2.78	1.11	147.70
2006-07	4.97	45.96	75.21	121.96	1.43	1.43	129.00
2007-08	4.42	80.80	85.11	163.83	1.43	1.27	170.20
2008-09	5.54	72.58	82.81	155.13	1.38	1.56	162.50
2009-10	4.49	52.74	75.14	127.48	1.37	1.68	133.70
2010-11	4.48	51.75	82.69	134.09	1.48	0.13	140.50
2011-12	4.63	65.35	75.52	140.28	1.46	-0.26	146.70
2012-13	4.59	47.95	79.23	127.18	1.38	0.41	133.60
2013-14	4.15	22.72	76.03	98.88	1.35	0.44	104.70
2014-15	3.99	19.22	71.89	91.72	0.98	0.87	96.95
2015-16	3.07	15.84	61.85	77.60	0.92	0.10	81.70
2016-17	2.19	12.65	53.27	66.09	0.62	0.14	68.85
2017-18	2.33	7.66	34.36	42.26	0.43	0.27	45.05
2018-19	2.32	15.20	53.76	69.11	0.43	0.16	71.85
2019-20	2.98	14.15	49.85	64.18	0.25	0.18	67.30
2020-21	3.05	5.81	43.66	49.65	0.22	0.21	52.95
2021-22 ^p	2.45	4.19	34.36	38.62	0.15	0.07	41.05
2022-23 ^f	1.593	2.63	23.67	#N/A	0.11	0.00	28.00

p = preliminary;

f = Forecast (based on the USDA production forecast for 2022-23 season released on October 12, 2022).

^a Certified deliveries to Florida processors based on Florida Department of Agriculture and Consumer Services data.

^b FCOJ and SSOJ utilization includes specialty boxes processed into orange juice; Florida reporting facilities (F.A.C. 20-3) only.

^c USDA final fresh utilization less FDACS certified fresh.

Table 2. Utilization of world oranges – Selected Countries.

Season	<u>United States</u>			<u>Brazil</u>			<u>Mexico</u>		
	Prod ^a	Util Fresh	Util Proc	Prod ^a	Util Fresh	Util Proc	Prod ^a	Util Fresh	Util Proc
- million 90-lb equivalent boxes -									
2003-04	288.4	50.9	237.6	450.0	135.0	315.0	95.6	90.7	4.9
2004-05	208.8	53.1	155.7	377.0	120.0	257.0	98.0	79.9	18.1
2005-06	203.4	48.6	154.9	467.0	117.0	350.0	101.8	88.1	13.7
2006-07	171.8	33.0	138.8	406.0	110.5	295.5	104.1	86.9	17.1
2007-08	227.0	49.9	177.1	441.0	110.0	331.0	105.3	80.8	24.5
2008-09	205.2	43.3	162.0	453.0	113.0	340.0	102.7	78.2	24.5
2009-10	186.4	50.3	136.0	413.0	124.0	289.0	99.2	77.7	21.6
2010-11	197.9	51.1	146.7	417.0	130.0	287.0	99.9	77.2	22.8
2011-12	199.6	50.7	148.9	388.0	119.0	269.0	89.8	69.5	20.3
2012-13	183.7	49.8	134.0	554.0	135.0	419.0	107.8	70.8	37.0
2013-14	150.4	42.1	108.3	504.0	177.0	327.0	111.0	81.6	29.4
2014-15	141.2	40.1	101.1	401.0	133.0	268.0	110.6	72.6	38.0
2015-16	135.3	45.1	90.2	438.0	148.0	290.0	112.8	72.3	40.4
2016-17	113.1	39.6	73.5	409.7	127.7	282.0	113.4	62.0	51.4
2017-18	86.1	37.0	49.1	353.3	121.3	232.0	111.0	64.4	46.5
2018-19	120.6	38.2	82.5	512.0	117.0	395.0	113.6	59.7	53.9
2019-20	115.9	41.5	74.4	391.0	122.0	269.0	62.0	39.9	22.0
2020-21	97.5	36.2	61.3	364.5	90.5	274.0	101.3	68.2	33.1
2021-22p	77.2	31.9	45.2	360.6	112.6	248.0	104.8	63.2	41.6
2022-23f	71.0	35.3	35.7	409.1	111.1	298.0	84.9	47.5	37.5

p = preliminary; f = Forecast (based on the USDA production forecast for 2022-23 season released on October 12, 2022).

^a U.S. production estimates as reported by USDA-NASS Citrus Fruits Summary (*various issues*) and converted into 90-lb equiv. boxes; Brazil based on various Foreign Agricultural Service GAIN reports and Fundecitrus/CitrusBR. Mexico based on Foreign Agricultural Service, Official USDA Estimates as of July 2021.

^b Fresh utilization includes NFC for domestic consumption for all seasons and NFC for export prior to 2003-04; thereafter, NFC-for-export, along with FCOJ utilization, is included in processed boxes.

^c Weighted by utilized round oranges and specialty citrus used in OJ.

Table 3. Comparative utilization of round oranges, Florida, São Paulo, and Mexico.

Season	Florida			São Paulo ^a			Mexico ^b		
	Prod	Utilization		Prod	Utilization		Prod	Utilization	
		Fresh	Processed		Fresh	Processed		Fresh	Processed
- million 90-lb equivalent boxes -									
2003-04	242.0	9.9	232.1	365.0	60.0	305.0	95.6	90.8	4.9
2004-05	149.8	7.4	142.4	290.0	46.0	244.0	98.0	80.1	18.1
2005-06	147.7	7.3	140.4	380.0	44.0	336.0	101.8	88.4	13.7
2006-07	129.0	6.4	122.6	320.0	36.5	283.5	104.1	86.6	17.1
2007-08	170.2	5.9	164.3	350.0	34.0	316.0	105.3	80.8	24.5
2008-09	162.5	6.9	155.6	360.0	35.0	325.0	102.7	78.1	24.5
2009-10	133.7	5.9	127.8	315.0	39.0	276.0	99.2	77.6	21.6
2010-11	140.5	6.0	134.5	320.0	46.0	274.0	99.9	77.3	22.8
2011-12	146.7	6.1	140.6	285.0	28.0	257.0	89.8	69.9	20.3
2012-13	133.6	6.0	127.6	444.0	49.0	395.0	107.8	70.7	37.0
2013-14	104.7	5.5	99.2	390.0	80.0	310.0	111.0	81.1	29.4
2014-15	97.0	5.1	91.8	290.0	45.0	245.0	110.6	72.2	38.0
2015-16	81.7	4.0	77.7	325.0	55.0	270.0	112.8	71.7	40.4
2016-17	68.9	2.8	66.0	300.7	38.7	262.0	113.4	60.6	51.4
2017-18	45.1	2.9	42.2	245.3	36.3	209.0	111.0	68.2	46.5
2018-19	71.9	3.0	68.8	407.0	36.0	371.0	113.6	60.9	53.9
2019-20	67.3	2.9	64.4	286.0	41.0	245.0	62.0	39.1	22.0
2020-21	53.0	3.3	49.7	268.6	46.1	222.5	101.3	67.3	33.1
2021-22p	41.1	2.6	38.5	263.0	38.6	224.4	104.8	62.2	41.6
2022-23f	28.0	1.7	26.3	314.0	37.1	277.0	84.9	46.3	37.5

p = preliminary;

f = Forecast (based on the USDA production forecast for 2022-23 season released on October 12, 2022).

^a Based on USDA, FAS, "Brazil Citrus Semi-annual," GAIN report various issues and Fundecitrus updates.

^b FAS Production, Supply and Demand database; 2020-21 and 2021-22 estimated using various industry sources. Data current through July 2021 and may not reflect the freezes from February 2021.

^c Weighted by utilized round oranges and specialty citrus used in OJ.

Table 4. Comparative orange juice yields, Florida, Brazil, and Mexico.

Season	Florida	São Paulo SSE gal/box	Mexico
2003-04	6.16219	5.97683	5.71360
2004-05	6.30517	6.23894	5.69285
2005-06	6.44845	5.79055	5.73593
2006-07	6.54986	6.24501	5.68517
2007-08	6.61971	6.07673	5.79887
2008-09	6.59442	6.18843	5.96943
2009-10	6.23481	5.59156	5.68517
2010-11	6.35204	5.38623	5.58736
2011-12	6.52862	5.87744	5.68517
2012-13	6.38718	5.32859	5.68517
2013-14	6.22370	5.36539	5.96554
2014-15	5.93257	5.01416	5.83188
2015-16	5.67329	5.87939	5.70240
2016-17	5.82744	4.67900	5.68517
2017-18	5.57996	4.93765	5.83478
2018-19	5.71727	5.01665	5.42675
2019-20	5.69192	5.22540	5.68517
2020-21	5.33159	5.32177	5.68517
2021-22 ^p	4.89963	5.34500	5.68517
2022-23 ^f	4.14410	5.29939	5.68517

^p = preliminary;

^f = Forecast (based on the USDA production forecast for 2022-23 season released on October 12, 2022).

^a Source: FDOC Processors Statistics database.

^b Source: CitrusBr

^c Mexico estimates are calculated using USDA/FAS Production, Supply and Distribution (PSD) Datasets.

Table 5. Comparative orange juice production, Florida, São Paulo, and Mexico.

Season	Florida (October - September)	São Paulo ^a (July - June)	Mexico (October - September)	Total
- million SSE gallons -				
2003-04	1,440.7	1,885.6	28.0	3,354.3
2004-05	900.6	1,602.9	103.2	2,606.7
2005-06	916.7	2,063.9	78.7	3,059.3
2006-07	807.1	1,789.5	97.5	2,694.1
2007-08	1,098.3	2,005.4	142.0	3,245.7
2008-09	1,024.7	2,061.1	146.2	3,232.0
2009-10	797.3	1,831.3	122.6	2,751.1
2010-11	854.0	1,772.8	127.3	2,754.0
2011-12	919.7	1,594.5	115.6	2,629.8
2012-13	812.3	2,228.2	210.3	3,250.8
2013-14	614.6	1,758.9	175.4	2,548.9
2014-15	540.5	1,364.8	221.4	2,126.7
2015-16	440.8	1,712.9	230.5	2,384.1
2016-17	384.1	1,401.0	292.4	2,077.5
2017-18	234.5	1,196.3	271.6	1,702.3
2018-19	394.3	2,015.1	292.4	2,701.8
2019-20	364.3	1,398.2	125.3	1,887.8
2020-21	263.8	1,185.1	188.0	1,636.9
2021-22 ^p	188.9	1,199.5	236.7	1,625.2
2022-23 ^f	112.1	1,453.4	213.0	1,778.5

p = preliminary;

f = Forecast (based on the USDA production forecast for 2022-23 season released on October 12, 2022).

^a Source: Brazilian Association of Citrus Exporters (CitrusBR)

Table 6. Total Florida, Brazil, and Mexico OJ availability

Season	Florida ^a		Brazil ^b		Mexico ^c		Total			Avail Change
	Beg.	Prod.	Beg.	Prod.	Beg.	Prod.	Beg.	Prod.	Avail	
	Inv.		Inv.		Inv.		Inv.			
- million SSE gallons -										
2003-04	680.53	1,448.16	210.28	1,885.60	1.39	27.99	892.21	3,361.75	4,253.96	18.2%
2004-05	794.78	911.12	334.23	1,602.90	1.39	103.19	1,130.40	2,617.21	3,747.60	-11.9%
2005-06	602.80	924.46	77.99	2,063.85	2.51	78.68	683.29	3,066.99	3,750.28	0.1%
2006-07	446.29	815.73	140.65	1,789.51	1.39	97.48	588.33	2,702.73	3,291.06	-12.2%
2007-08	363.06	1,107.55	25.07	2,005.36	1.39	142.05	389.52	3,254.96	3,644.48	10.7%
2008-09	624.16	1,034.74	20.89	2,061.07	2.79	146.22	647.84	3,242.04	3,889.88	6.7%
2009-10	672.93	806.07	231.17	1,831.29	2.79	122.55	906.89	2,759.91	3,666.80	-5.7%
2010-11	548.46	863.71	239.53	1,772.80	2.79	127.28	790.78	2,763.79	3,554.57	-3.1%
2011-12	391.23	928.39	178.25	1,594.54	2.79	115.59	572.27	2,638.52	3,210.79	-9.7%
2012-13	433.56	820.90	90.52	2,228.18	-	210.28	524.08	3,259.37	3,783.44	17.8%
2013-14	523.57	622.41	612.75	1,758.87	2.29	175.36	1,138.61	2,556.64	3,695.25	-2.3%
2014-15	473.95	547.24	708.84	1,364.76	1.27	221.43	1,184.06	2,133.43	3,317.49	-10.2%
2015-16	503.16	443.59	465.13	1,712.92	2.39	230.48	970.68	2,386.98	3,357.66	1.2%
2016-17	409.89	387.41	458.17	1,400.97	2.37	292.45	870.43	2,080.83	2,951.26	-12.1%
2017-18	368.28	236.73	204.71	1,196.26	1.67	271.56	574.67	1,704.54	2,279.21	-22.8%
2018-19	357.31	396.47	8.36	2,015.11	2.79	292.45	368.45	2,704.03	3,072.48	34.8%
2019-20	517.69	366.60	222.82	1,398.18	-	125.34	740.51	1,890.12	2,630.63	-14.4%
2020-21	397.78	265.55	666.19	1,185.09	2.79	188.00	1,066.75	1,638.65	2,705.40	-11.88%
2021-22p	347.20	192.46	448.14	1,199.54	2.79	236.74	798.12	1,628.74	2,426.85	-10.30%
2022-23f	207.91	112.14	202.35	1,453.38	2.79	213.01	413.05	1,778.53	2,191.57	-9.69%

p = preliminary;

f = Forecast (based on the USDA production forecast for 2022-23 season released on October 12, 2022).

^a Source: Florida Department of Citrus Processor Database.

^b Source: Brazilian Association of Citrus Exporters (CitrusBR).

^c Source: USDA/FAS Production, Supply and Distribution (PSD) Datasets for Mexico.

Table 7. Brazil orange juice exports to select regions.

Table 7: Brazil Orange juice exports to select regions.

Season	USMCA			Europe			East Asia	All Else	Total
	Concentrate	NFC	Total	Concentrate	NFC	Total	Total	Total	
Jul - Jun	- million SSE gallons -								
2002-03	328.09	10.90	338.98	1,203.72	40.49	1,244.20	174.97	73.02	1,831.18
2003-04	226.52	20.52	247.03	1,362.70	58.61	1,421.32	205.34	72.97	1,946.66
2004-05	281.08	21.00	302.07	1,330.54	74.21	1,404.75	205.98	88.64	2,001.45
2005-06	223.00	24.60	247.59	1,206.68	102.90	1,309.58	231.93	115.46	1,904.56
2006-07	336.80	34.91	371.71	1,219.97	135.76	1,355.73	183.07	90.66	2,001.18
2007-08	274.35	72.80	347.15	1,051.31	157.51	1,208.83	164.23	92.22	1,812.43
2008-09	147.29	59.26	206.55	1,150.97	173.89	1,324.86	161.44	91.39	1,784.24
2009-10	200.57	60.39	260.96	1,085.01	167.50	1,252.51	189.07	89.16	1,791.70
2010-11	86.28	73.06	159.34	978.55	197.67	1,176.22	227.75	80.34	1,643.65
2011-12	149.29	67.38	216.68	970.30	173.15	1,143.45	174.90	84.96	1,619.99
2012-13	222.31	69.51	291.82	929.34	214.98	1,144.32	146.16	77.72	1,660.02
2013-14	252.62	48.96	301.58	804.02	213.92	1,017.94	135.34	84.86	1,539.71
2014-15	261.06	83.43	344.50	884.95	210.27	1,095.22	144.98	91.79	1,676.49
2015-16	191.39	88.13	279.52	898.24	228.44	1,126.68	124.76	81.90	1,612.86
2016-17	144.04	101.30	245.34	652.13	234.23	886.36	113.50	96.19	1,341.39
2017-18	290.29	154.93	445.23	806.54	228.19	1,034.74	151.06	86.68	1,717.70
2018-19	126.29	150.72	277.00	684.16	230.21	914.37	120.66	73.21	1,385.25
2019-20	155.75	135.73	291.48	712.62	255.72	968.34	144.10	83.66	1,487.58
2020-21	121.47	161.68	283.14	669.91	219.27	889.18	164.33	74.41	1,411.06
2021-22p	132.4	181.6	314.0	705.5	225.3	930.8	174.1	76.1	1,495.00

Source: FDOC-EMRD IMEX Database; Secretary of External Commerce – Brazil Comex Stat

Table 8. U.S. Imports orange juice, by origin and type.

FCOJ	2017-18	2018-19	2019-20	2020-21	2021-22
Florida Ports	308,813,933	259,877,147	120,237,520	175,014,098	178,114,848
BRAZIL	152,741,797	65,828,582	29,623,767	57,711,921	32,850,373
MEXICO	117,892,031	161,797,022	61,128,559	91,708,575	118,417,894
COSTA RICA	32,590,956	29,706,057	25,638,906	23,870,353	25,786,273
BELIZE	5,438,397	2,327,934	3,578,647	1,449,858	102,830
Rest of World	150,751	217,551	267,641	273,390	957,478
Rest of US	121,230,716	88,513,838	83,466,244	89,606,491	81,798,725
BRAZIL	90,883,636	67,278,889	65,233,048	70,419,192	62,677,270
MEXICO	25,244,623	18,559,430	15,428,259	16,244,040	13,839,183
COSTA RICA	1,378,126	211,251	556,074	720,455	1,282,144
BELIZE				200	
Rest of World	3,724,331	2,464,269	2,248,862	2,222,604	4,000,128
FCOJ Total	430,044,649	348,390,985	203,703,764	264,620,589	259,913,573
NFC-OJ	2017-18	2018-19	2019-20	2020-21	2021-22
Florida Ports	104,524,871	88,596,139	38,550,471	73,003,176	124,769,318
BRAZIL	94,366,794	76,006,369	30,400,980	56,429,047	108,008,020
MEXICO	10,158,077	12,588,534	8,123,475	16,533,163	16,512,468
Rest of World		1,236	26,016	40,966	248,830
Rest of US	46,745,729	44,799,286	49,988,471	56,111,399	55,875,578
BRAZIL	33,440,270	33,003,291	39,575,844	41,293,369	38,887,017
MEXICO	13,197,735	11,739,404	10,330,474	14,372,111	15,655,190
Rest of World	107,724	56,591	82,153	445,919	1,333,371
NFC-OJ Total	151,270,600	133,395,425	88,538,942	129,114,575	180,644,897

Source: U.S. Department of Commerce.

Table 9. Forcasted total Florida OJ availability, movement, and carryover for 2022-23, and actual for 2020-21 and 2021-22.

Item ^a	2020-21	2021-22p	2022-23f		
			Low	Mid	High
- million PS -					
Beginning Inventory	397.8	347.2	214.3	214.3	214.3
Production ^d	265.6	192.5	112.1	112.1	112.1
Imports ^e	300.6	315.2	400.2	444.6	489.1
Other adjustments ^e	35.2	44.0	24.1	24.1	24.1
Availability	999.1	898.8	750.7	795.1	839.6
Total Movement	651.9	684.4	605.7	605.7	605.7
Domestic	609.6	643.7	585.1	585.1	585.1
Export	23.9	21.2	20.6	20.6	20.6
Ending Inventory	347.3	214.3	145.02	189.5	233.94
- weeks supply -					
Carryover	28.5	16.8	12.5	16.3	20.1

p = preliminary;

f = Forecast (based on the USDA production forecast for 2022-23 season released on October 12, 2022).

^a Based on data reported by Florida Citrus processors' statistics; October-September season.

^b Projected Florida imports 10% less than middle scenario.

^c Projected Florida imports 10% more than middle scenario.

^d Includes production by Florida Citrus processors' statistics members and an estimate of other Florida production by non-members.

^e Foreign and domestic; reprocessed tangerine juice; net loss/gain during reprocessing; and adjustments.

Table 10. Florida FCOJ forecasted availability, movement, and carryover for 2022-23, and actual for 2019-20 to 2021-22.

Item	2019-20	2020-21	2021-22p	2022-23f
FCOJ	- million SSE gallons -			
Beginning Inventory	314.61	252.33	226.17	122.19
Pack	79.70	29.37	19.74	10.78
Other Sources	160.14	214.49	185.13	294.42
Imports	146.22	211.76	185.28	294.60
FCTJ	2.65	4.00	3.70	3.45
Evap	17.88	6.40	4.39	1.55
Net loss/gain	(1.97)	(1.45)	(2.88)	(5.18)
Total FCOJ Availability	559.09	502.42	436.40	427.39
Total FCOJ Movement	306.88	276.24	314.20	319.23
By Form				
Retail	9.68	8.05	7.79	7.65
Institutional	44.49	46.61	53.78	43.47
Bulk	252.71	221.58	252.63	268.11
By Market				
Domestic	291.72	254.26	294.89	300.24
Export	15.16	21.99	19.31	18.99
Ending Inventory	252.33	226.17	122.19	108.17
Carryover	43.58	42.57	20.22	17.62

p = preliminary;

Forecast (based on the USDA production forecast for 2020-21 season released on October 10, 2020).

^a Includes pack from specialty fruit.

^b Domestic receipts by members of non-Florida products; Florida product received by members from non-members; foreign imports; reprocessed frozen concentrated tangerine juice; chilled OJ used in FCOJ, net loss or gain during reprocessing; and adjustments.

^c Forecasted imports, FCTJ, Evap and Net loss/gain adjustments combined in October 2020 Florida Citrus Outlook.

Data source: FDOC Florida Citrus processors' statistics database.

Table 11. Florida SSOJ forecasted availability, movement, and carryover of Florida SSOJ for 2022-23, and actual for 2019-20 to 2021-22.

Item ^a	2019-20	2020-21	2021-22p	2022-23f
SSOJ ----- million SSE gallons -----				
Beginning Inventory	203.09	145.45	121.02	92.14
Pack From Fruit	284.57	234.40	169.14	101.36
Other Sources	36.01	98.48	152.61	172.69
Imports	35.63	88.86	129.87	141.56
Recon	22.22	23.10	33.39	38.40
Net loss/gain	(21.83)	(13.48)	(10.66)	(7.27)
Total SSOJ Availability	523.67	478.33	442.77	366.19

Total SSOJ Movement	378.22	357.24	350.63	284.87
By Form				
Packaged	352.21	343.89	333.57	269.24
Bulk	26.01	13.35	17.06	17.19
NFC By Market				
Domestic	375.62	355.35	348.78	284.85
Export	2.60	1.90	1.85	1.58

Ending Inventory	145.45	121.09	92.14	83.67
Bulk Ending Inventory ^d	139.52	116.08	86.79	78.67

----- weeks supply -----				
Carryover	20.4	17.6	13.7	15.3
Bulk Carryover ^d	19.6	16.9	12.9	14.4

p = preliminary;

f = Forecast (based on the USDA production forecast for 2022-23 season released on October 12, 2022).

Source: Florida Citrus processors' statistics.

^a Availability, movement and inventory adjusted by Florida Citrus processors' statistics to 11.8° Brix gallons.

^b Includes supplies from non-member sources and adjustments.

^c Assumes RECON movement equals pack from FCOJ.

^d Forecasted adjustment incorporated into pack from fruit in October 2020 Florida Citrus Outlook.

^e Assumes bulk inventories are NFC.

Table 12. U.S. orange juice supply and disappearance.

Season	Beginning Inventory a	Total U.S. Production b	United States		Ending Inventory	Disappearance	
			Imports ^c	Exports ^{c,d}		TOTAL	Per Capita
- millions SSE gallons -							gallons
2003-04	804.1	1,475.7	222.3	123.0	890.0	1,489.2	5.2
2004-05 ^a	890.0	977.7	357.5	119.1	674.9	1,431.2	5.0
2005-06	674.9	996.2	298.8	137.7	808.4	1,023.9	3.5
2006-07	808.4	896.1	399.2	122.6	651.4	1,329.7	4.5
2007-08	651.4	1,171.6	405.5	138.7	1,161.8	927.9	3.1
2008-09	1,161.8	1,066.8	317.4	124.7	1,188.3	1,233.0	4.1
2009-10	1,188.3	846.8	327.6	146.7	1,005.7	1,210.3	4.0
2010-11	1,005.7	920.2	265.2	214.2	657.7	1,319.1	4.4
2011-12	657.7	966.9	223.3	151.7	730.3	966.0	3.2
2012-13	730.3	850.7	420.5	169.4	856.2	975.8	3.2
2013-14	856.2	664.4	417.6	160.0	782.5	995.8	3.2
2014-15 ^e	782.5	590.3	458.4	113.1	525.0	1,193.0	3.8
2015-16	525.0	504.0	390.1	91.6	436.8	890.7	2.8
2016-17	436.8	420.5	416.8	72.1	378.2	823.8	2.6
2017-18	378.2	268.6	581.3	44.8	364.8	818.5	2.6
2018-19	364.8	456.0	481.8	41.9	528.2	732.5	2.3
2019-20 ^e	528.2	408.7	292.2	47.8	415.9	765.4	2.4
2020-21 ^f	421.81	315.95	393.75	43.15	371.89	716.47	2.2
2021-22 ^p	371.89	229.66	414.41	39.21	251.67	725.08	2.22
2022-23 ^f	251.67	163.42	533.34	30.77	209.10	708.55	2.05

p = preliminary;

f = Forecast (based on the USDA production forecast for 2022-23 season released on October 12, 2022).

^a Based on FCOJ inventories for the United States (National Agricultural Statistics Service, Cold Storage Reports) plus Florida SSOJ inventories (FCPS); in 2003-04 and prior years based on Florida FCOJ and SSOJ inventories (adjusted to 11.8° Brix gallons).

^b OJ production from TX and CA estimated using USDA estimates, Florida production includes estimate from non-reporting processor members.

^c U.S. Department of Commerce. Actual prior to 2019-20. Projected for September 2020-21 season.

^d FDOC processor statistics reporting exports which exceeded the volume reported by the U.S. Department of Commerce.

^e Ending inventories for a 53-week season.

^f Adjustment to non-Florida cold storage is reflected in season 2020-21 and forward.

Table 13. Florida processor OJ receipts, movement, and inventory, by type.

Season	Net from Florida Fruit ^a	Imports and Other Receipts ^{b,c}	Domestic Packaged Movement	Domestic Bulk Movement	All exports	Net change in inventory
----- million SSE gallons -----						
<u>FCOJ</u>						
2013-14	151.78	204.82	84.68	258.52	49.69	(36.30)
2014-15	123.33	252.37	83.93	234.31	36.18	21.28
2015-16	92.78	197.77	78.72	235.29	41.96	(65.42)
2016-17	75.67	254.37	68.75	224.05	60.00	(22.75)
2017-18	42.16	304.46	64.35	214.88	15.69	51.70
2018-19	87.03	295.82	63.56	225.57	18.98	74.75
2019-20	82.04	164.78	54.17	237.55	15.16	(60.06)
2020-21	31.15	220.71	54.67	199.59	21.99	(24.38)
2021-22p	23.32	190.49	61.25	233.64	19.31	(100.39)
2022-23f	11.75	294.42	51.12	268.11	18.99	(32.04)
<u>SSOJ</u>						
2013-14	470.63	17.55	434.44	34.72	24.57	(5.55)
2014-15	423.91	34.07	407.12	28.40	8.04	14.42
2015-16	350.81	39.69	384.92	23.77	6.82	(25.01)
2016-17	311.74	59.37	356.01	25.65	5.01	(15.55)
2017-18	194.56	100.04	328.96	24.13	1.97	(60.46)
2018-19	309.44	110.30	318.16	17.30	2.21	82.06
2019-20	284.57	36.01	352.16	23.46	2.60	(57.64)
2020-21	234.40	98.48	343.89	11.45	1.90	(24.36)
2021-22p	169.14	152.61	333.57	15.21	1.85	(28.89)
2022-23f	101.36	174.24	269.24	17.19	1.58	(12.41)

p = preliminary;

^a FCOJ includes an estimate of non-reporting processor pound solids.

^b FCOJ other receipts includes net loss/gain in production, evaporated SSOJ, and concentrated tangerine juice used in FCOJ.

^c SSOJ other receipts includes net loss/gain in production, reconned FCOJ used in SSOJ, and is less evaporated SSOJ

Florida Department of Citrus; processor database.

Table 14. Retail orange juice sales.

Season	NFC	RECON	FCOJ	Other	TOTAL
Volume^b					
----- million SSE gallons -----					
2013-14	310.6	191.5	23.4	0.5	526.1
2014-15	292.1	175.9	21.2	0.6	489.8
2015-16	282.8	164.9	20.0	0.4	468.1
2016-17	265.4	148.7	18.1	0.3	432.4
2017-18 ^c	249.1	133.3	16.4	12.3	411.4
2018-19	231.0	136.0	14.7	12.6	394.2
2019-20	263.5	150.9	17.9	13.1	445.4
2021-22	260.3	137.5	15.1	14.7	427.6
2021-22p^a	244.5	135.0	14.7	13.3	407.5
2022-23f					
High Price	193.3	159.2	13.7	12.8	379.0
Mid-Price	198.7	163.6	14.1	13.2	389.5
Low Price	205.0	168.8	14.5	13.6	402.0
Price^b					
----- \$ per SSE gallon -----					
2013-14	7.27	4.87	4.89	8.89	6.29
2014-15	7.63	4.95	4.96	9.11	6.55
2015-16	7.56	4.92	4.91	8.95	6.51
2016-17	7.67	5.15	4.93	8.67	6.69
2017-18 ^c	7.92	4.97	5.07	7.45	6.83
2018-19	8.40	4.88	5.06	7.42	7.03
2019-20	8.62	4.86	5.13	7.31	7.17
2021-22	8.81	4.86	5.13	7.62	7.37
2021-22p^a	9.48	5.31	5.33	8.21	7.91
2022-23f					
High Price	10.36	6.08	5.45	8.71	8.43
Mid-Price	10.27	6.03	5.40	8.63	8.36
Low Price	10.18	5.98	5.35	8.55	8.28

p = preliminary.

f = Forecast (based on the USDA production forecast for 2022-23 season released on October 12, 2022).

^a Based on an analysis of trends to estimate remaining two periods for the season. Nothing herein is meant to imply minimum pricing, nor FDOC staff opinion on optimal pricing.

^b Data source: Nielsen Answers on Demand, Expanded All Outlets Combined; FDOC Custom database. Grocery stores \$2 million+, mass merchandisers, Walmart discount stores and supercenters, club stores, dollar stores, drug stores \$1 million+, and military/DECA.

^c Routine maintenance of the FDOC Custom database revealed several items (UPCs) were categorized as Recon OJ instead of shelf stable OJ. The database was refreshed in January 2019 altering the totals for the 2017-18 season forward.

Table 15. Share of 100% orange juice sold on promotion with reported price, by type

Season	2017-18	2018-19	2019-20	2020-21
Share - Any Promo^a	----- % of total sales -----			
NFC	35.1%	30.4%	28.5%	27.6%
RECON	25.2%	21.4%	22.1%	24.6%
TOTAL	30.2%	26.0%	25.0%	25.4%
Share - No Promo	----- % of total sales -----			
NFC	64.9%	69.6%	71.5%	72.4%
RECON	74.8%	78.6%	77.9%	75.4%
TOTAL	69.8%	74.0%	75.0%	74.6%
Any Promo Price	----- \$ per SSE gallon -----			
NFC	\$7.66	\$7.93	\$8.13	\$8.61
RECON	\$4.36	\$4.27	\$4.33	\$4.65
TOTAL	\$6.65	\$6.83	\$6.99	\$7.26
No Promo Price	----- \$ per SSE gallon -----			
NFC	\$8.81	\$8.93	\$9.09	\$9.81
RECON	\$5.05	\$5.03	\$5.01	\$5.52
TOTAL	\$7.20	\$7.29	\$7.50	\$8.13

^aShare sold on promotion include feature items, display items, a combination of both feature and display, and temporary price reductions (also known as price decrease). Information is reported for informational purposes. Outlook projections of retail sales are not disaggregated by promotional activity.

Data source: Nielsen Answers on Demand, Expanded All Outlets Combined; FDOC Custom database.

Table 16. Destination markets for Florida certified fresh orange shipments.

Season	Exports		Domestic				TOTAL ^b	
(Aug-July)	Overseas ^a	Canada	South	Northeast	Central	West		
----- million 45-pound cartons -----								
2004-05	0.42	0.57	3.99	3.37	1.21	0.24	9.81	90-lb boxes 4.90
2005-06	0.15	0.54	4.03	3.14	1.04	0.16	9.06	4.53
2006-07	0.12	0.56	4.51	3.11	1.26	0.04	9.59	4.80
2007-08	0.28	0.49	3.91	2.91	0.97	0.01	8.58	4.29
2008-09	0.25	0.59	4.69	3.97	1.30	0.02	10.83	5.41
2009-10	0.19	0.55	3.83	3.17	0.95	0.03	8.73	4.36
2010-11	0.14	0.55	3.70	3.22	1.03	0.04	8.69	4.35
2011-12	0.09	0.51	3.93	3.27	1.22	0.06	9.08	4.54
2012-13	0.12	0.57	3.92	3.16	1.21	0.04	9.02	4.51
2013-14	0.12	0.53	3.35	2.81	1.28	0.03	8.13	4.06
2014-15	0.06	0.65	3.09	2.68	1.33	0.03	7.83	3.92
2015-16	0.13	0.50	2.29	1.97	1.10	0.02	6.02	3.01
2016-17	0.03	0.39	1.51	1.61	0.82	0.02	4.38	2.19
2017-18	0.02	0.34	1.64	1.57	1.05	0.05	4.67	2.33
2018-19	0.04	0.27	1.54	1.66	1.08	0.04	4.63	2.32
2019-20	0.02	0.24	2.38	2.00	1.27	0.04	5.96	2.98
2020-21	0.03	0.19	2.66	1.74	1.27	0.21	6.09	3.05
2021-22p	0.02	0.15	1.96	1.47	1.23	0.06	4.89	2.45
2022-23f	0.01	0.11	1.32	0.98	0.71	0.06	3.19	1.59

p = preliminary.

f = Forecast (based on the USDA production forecast for 2022-23 season released on October 12, 2022).

Source: Division of Fruit and Vegetable Inspection Service, Florida Department of Agriculture.

a Includes some offshore exports not destined for Europe.

b May not add up due to rounding.

Table 17. Utilization of Florida grapefruit.

Season	Volume					
	Fresh	FCGJ	SSGJ	Non-Certified	Other ^a	TOTAL
----- millions 85-lb boxes -----						
2003-04	15.18	17.19	6.59	1.48	0.47	40.90
2004-05	6.70	2.47	2.76	0.71	0.15	12.80
2005-06	6.24	8.00	4.12	0.68	0.26	19.30
2006-07	10.31	11.56	4.43	0.65	0.25	27.20
2007-08	9.91	10.45	5.20	0.71	0.33	26.60
2008-09	8.68	8.42	3.70	0.66	0.23	21.70
2009-10	8.71	6.04	4.59	0.65	0.32	20.30
2010-11	7.73	7.01	4.18	0.66	0.18	19.75
2011-12	7.25	6.87	3.83	0.68	0.22	18.85
2012-13	7.14	6.10	4.23	0.70	0.18	18.35
2013-14	6.05	4.73	4.05	0.50	0.32	15.65
2014-15	5.27	3.83	3.16	0.44	0.19	12.90
2015-16	4.54	2.77	3.04	0.41	0.04	10.80
2016-17	3.25	1.81	2.36	0.25	0.09	7.76
2017-18	1.62	0.54	1.54	0.12	0.06	3.88
2018-19	1.79	0.60	1.97	0.14	0.01	4.51
2019-20	2.04	0.47	2.24	0.09	<0.001	4.85
2020-21	1.89	0.31	1.79	0.10	0.01	4.10
2021-22 ^p	1.76	0.20	1.33	0.07	<0.001	3.33
2022-23 ^f	1.02	0.08	0.85	0.05	<0.001	2.00

p = preliminary;

f = Forecast (based on the USDA production forecast for 2022-23 season released on October 12, 2022).

Table 18. Forecast availability, movement, and carryover of Florida FCGJ and SSGF for 2020-21, and actual for 2021-22 through 2022-23.

Item	2019-20	2020-21	2021-22p	2022-23f
<u>FCGJ</u>		--- millions SSE gallons ---		
Beginning Inventory	7.99	8.48	6.58	4.21
Pack From Fruit	2.56	1.48	1.02	0.43
Imports and other adjustments ^a	1.64	1.05	0.84	1.21
Total FCGJ Availability	<u>12.19</u>	<u>11.01</u>	<u>8.43</u>	<u>5.86</u>
Movement	<u>3.71</u>	<u>4.44</u>	<u>4.22</u>	<u>3.55</u>
Ending Inventory	8.48	6.58	4.21	2.32
Carryover (weeks supply)	121.3	77.1	51.8	34.0
<u>SSGJ^c</u>		--- Million SSE gallons ---		
Beginning Inventory	9.85	10.98	10.32	8.45
Pack from Fruit ^a	11.94	9.08	7.25	4.56
Imports/Dom Receipts ^b	<u>2.62</u>	<u>2.18</u>	<u>3.58</u>	<u>4.26</u>
Total SSGJ Availability	<u>24.42</u>	<u>22.24</u>	<u>21.16</u>	<u>17.27</u>
Movement – NFC	13.13	11.78	11.98	11.77
Movement– RECON/EVAP ^{d,e}	0.62	0.42	0.98	0.67
Total SSGJ Movement	<u>13.44</u>	<u>12.04</u>	<u>12.71</u>	<u>12.20</u>
Bulk Ending Inventory	10.67	10.04	8.19	4.84
		--- Weeks supply ---		
Bulk Carryover ^f	48.2	44.1	34.6	21.7
<u>TOTAL GJ</u>				
Beginning Inventory	17.84	19.46	17.00	12.66
Production and Imports ^a	<u>19.02</u>	<u>13.43</u>	<u>13.07</u>	<u>10.03</u>
Total GJ Availability	<u>36.86</u>	<u>32.90</u>	<u>29.97</u>	<u>22.69</u>
Movement- Domestic	14.74	14.32	15.30	14.91
Movement- Export	2.09	1.90	0.91	0.40
Total GJ Movement	<u>16.83</u>	<u>16.22</u>	<u>16.21</u>	<u>15.31</u>
Bulk Ending Inventory	19.75	17.00	12.66	7.38
		--- Weeks supply ---		
Carryover	62.2	54.5	42.9	25.1

p = preliminary;

Source: FDOC Florida Citrus processors' statistics database.

^a Includes adjustments and pack from reprocessed FCGJ.

^b Includes domestic receipts of non-Florida product, receipts of Florida product from non-member processors, and receipts from foreign sources

^c Availability, movement and inventory adjusted by FCPS to 10.0° Brix gallons.

^d Rounds to zero on FPS Weekly Report.

^e Assumes RECON movement equals pack from FCGJ.

^f Includes packaged

Table 19. U.S. grapefruit juice production, supply, and disappearance.

Season	United States ^a					Disappearance	
	Beg Inv	Prod ^b	Imports	Exports ^c _d	End Inv	TOTAL	Per Capita
Millions SSE gallons							
2003-04 ^e	82.7	146.8	0.5	64.1	72.1	93.8	0.32
2004-05 ^f	72.1	53.2	11.4	27.6	35.9	73.1	0.25
2005-06	36.0	81.3	5.6	21.6	44.8	56.5	0.19
2006-07	44.8	124.7	0.9	42.9	62.6	64.9	0.22
2007-08	62.6	113.9	0.3	40.5	64.9	71.4	0.23
2008-09 ^e	64.9	88.3	0.5	37.1	50.4	66.1	0.22
2009-10	50.4	82.0	0.6	24.7	45.8	62.5	0.20
2010-11	45.8	87.3	0.4	32.8	35.6	65.1	0.21
2011-12	35.6	81.7	0.5	23.8	39.5	54.5	0.17
2012-13	39.5	78.5	0.8	22.7	36.8	59.3	0.19
2013-14	36.8	67.1	0.3	18.2	35.9	50.1	0.16
2014-15 ^e	35.9	51.6	0.4	16.0	29.7	42.2	0.13
2015-16	29.7	45.8	0.8	11.1	27.7	37.6	0.12
2016-17	27.7	37.9	2.8	8.6	21.0	38.7	0.12
2017-18	21.0	23.7	6.7	6.8	14.0	30.6	0.09
2018-19	14.0	38.9	12.3	5.9	17.8	41.5	0.13
2019-20 ^e	17.8	30.3	5.0	5.0	19.5	28.7	0.09
2020-21 ^g	19.5	18.4	2.7	4.9	23.5	18.9	0.06
2021-22 ^p	23.6	22.0	3.9	4.8	15.3	29.3	0.09
2022-23 ^f	15.3	15.2	5.1	5.0	9.5	21.2	0.06

p = preliminary;

f = Forecast (based on the USDA production forecast for 2022-23 season released on October 12, 2022).

^a Estimated as U.S. production plus imports minus exports plus beginning inventory minus ending inventory. Prior to 2019-20 season, presumed consumption estimates may have included cold storage outside of Florida. As of 2021-22, estimates of non-Florida processor cold storage incorporated into beginning and ending inventory.

^b GJ production from TX and CA estimated using USDA estimates, Florida production includes estimate from non-reporting processor members.

^c U.S. Department of Commerce, except for exports in 2002-03, 2003-04, and 2006-07 through 2010-11.

^d FDOC processor statistics reporting exports which exceeded the volume reported by the U.S. Department of Commerce.

^e Ending inventories for a 53-week season.

^f 2004-05 and thereafter Florida bulk NFC inventory and production adjusted by FCPS to 10.0° Brix gallons.

^g Production and inventory adjustments may have reduced actual Disappearance measure by approximately 5 million gallons.

Table 20. Retail grapefruit juice sales.

Season	Refrig. NFC	Refrig. RECON	FCGJ	Shelf Stable	TOTAL
Volume					
-----million SSE gallons -----					
2013-14	10.05	0.94	0.32	4.22	15.53
2014-15	9.29	1.02	0.10	3.87	14.27
2015-16	9.40	0.99	0.18	3.82	14.39
2016-17 ^b	9.51	0.53	0.12	3.77	13.93
2017-18 ^b	8.77	0.48	0.09	3.77	13.11
2018-19 ^{b,c}	8.11	0.12	0.38	3.02	11.63
2019-20 ^{b,c}	8.91	0.15	2.99	0.47	12.52
2020-21	8.47	0.18	2.97	0.42	12.04
2021-22 ^p	8.21	0.20	2.54	0.46	11.41
2022-23 ^f					
High Price	7.91	0.16	0.38	2.79	11.25
Mid Price	8.25	0.17	0.41	2.89	11.71
Low Price	8.61	0.17	0.44	2.99	12.21
Price					
----- \$ per SSE gallon -----					
2013-14	7.57	6.26	4.61	6.39	7.11
2014-15	7.85	6.17	5.24	6.43	7.32
2015-16	7.83	6.48	4.36	6.41	7.32
2016-17 ^b	7.96	5.88	4.42	6.28	7.40
2017-18 ^b	8.30	6.71	4.84	6.19	7.61
2018-19 ^{b,c}	8.86	13.78	4.74	6.64	8.19
2019-20 ^{b,c}	9.27	18.16	3.83	7.41	8.73
2020-21	9.49	19.12	7.73	4.60	9.03
2021-22 ^p	10.01	19.97	8.71	5.79	9.73
2022-23 ^f					
High Price	10.85	21.62	6.12	9.36	10.50
Mid Price	10.54	20.99	5.94	9.09	10.20
Low Price	10.22	20.36	5.76	8.81	9.89

p = preliminary.

f = Forecast (based on the USDA production forecast for 2022-23 season released on October 12, 2022).

^a Based on an analysis of trends. Nothing herein is meant to imply minimum pricing, nor FDOC staff opinion on optimal pricing.

^b Data source: Nielsen Answers on Demand, Expanded All Outlets Combined; FDOC Custom database. Grocery stores \$2 million+, mass merchandisers, Walmart discount stores and supercenters, club stores, dollar stores, drug stores \$1 million+, and military/DECA.

^c One or more refrigerated recon products, as indicated by UPCs in the FDOC custom database, were confirmed as discontinued leading to a significant drop in volume for the category. The volume remaining recon products reflects equivalent gallons of small container sizes which would indicate a significant increase in price.

Table 21. Share of 100% grapefruit juice sold on promotion with reported price, by type.

Season	2018-19	2019-20	2020-21	2021-22
Share - Any promo^a	----- % of total sales -----			
NFC	38.3%	34.1%	31.4%	29.1%
RECON	10.9%	8.0%	6.2%	5.2%
TOTAL	30.7%	27.1%	24.3%	23.3%
Share - No Promo	----- % of total sales -----			
NFC	61.7%	65.9%	68.6%	70.9%
RECON	89.1%	92.0%	94.0%	94.8%
TOTAL	69.3%	72.9%	75.7%	76.7%
Any Promo Price	----- \$ per SSE gallon -----			
NFC	\$7.72	\$8.00	\$8.21	\$8.49
RECON	\$6.41	\$7.51	\$9.09	\$10.95
TOTAL	\$7.59	\$7.92	\$8.27	\$8.64
No Promo Price	----- \$ per SSE gallon -----			
NFC	\$9.71	\$9.93	\$10.07	\$10.64
RECON	\$6.83	\$7.40	\$7.66	\$8.59
TOTAL	\$8.66	\$9.03	\$9.27	\$10.06

^aShare sold on promotion include feature items, display items, a combination of both feature and display, and temporary price reductions (also known as price decrease). Information is reported for informational purposes. Outlook projections of retail sales are not disaggregated by promotional activity.

Data source: Nielsen Answers on Demand, Expanded All Outlets Combined; FDOC Custom database.

Table 22. Destination markets for Florida certified fresh grapefruit.

Season (Aug-July)	Domestic	Exports				TOTAL ^b	
		Canada	Europe ^a	Far East	Total Exports ^b		
	----- million 42½-pound cartons -----						million 85-lb box equivalent
2003-04	9.00	1.80	6.90	12.70	21.40	30.40	15.20
2004-05	4.90	0.80	2.80	5.00	8.60	13.50	6.75
2005-06	4.80	0.80	2.10	4.80	7.70	12.50	6.25
2006-07	6.75	1.28	4.40	8.20	13.87	20.62	10.31
2007-08	6.20	1.20	5.00	7.50	13.70	19.90	9.95
2008-09	6.05	1.09	3.92	6.30	11.31	17.35	8.68
2009-10	6.11	1.15	3.46	6.71	11.31	17.42	8.71
2010-11	5.40	1.10	3.12	5.84	10.06	15.46	7.73
2011-12	5.53	0.99	2.80	5.17	8.96	14.49	7.25
2012-13	5.99	1.09	2.92	4.28	8.28	14.27	7.14
2013-14	5.13	0.99	2.61	3.39	6.98	12.11	6.05
2014-15	4.44	0.81	2.24	3.06	6.11	10.55	5.27
2015-16	3.79	0.65	1.93	2.70	5.28	9.07	4.54
2016-17	2.66	0.42	1.42	1.99	3.83	6.49	3.25
2017-18	1.51	0.22	0.61	0.90	1.73	3.24	1.62
2018-19	1.87	0.30	0.52	0.88	1.70	3.57	1.78
2019-20	2.24	0.31	0.71	0.83	1.85	4.09	2.04
2020-21	2.45	0.22	0.52	0.57	1.33	3.78	1.89
2021-22p	2.60	0.16	0.42	0.32	0.92	3.52	1.76
2022-23f	1.29	0.12	0.30	0.33	0.75	2.04	1.02

p = preliminary.

f = Forecast (based on the USDA production forecast for 2022-23 season released on October 12, 2022).

Source: Division of Fruit and Vegetable Inspection Service, Florida Department of Agriculture.

^a Includes some offshore exports not destined for Europe.

^b May not add up due to rounding.

Table 23. Utilization of Florida fresh specialty.

Season	Fresh	Non-Certified	Processed	Total
----- millions 90-pound boxes -----				
2003-04	4.99	0.26	2.52	7.50
2004-05	3.81	0.29	2.19	6.00
2005-06	4.16	0.34	2.75	6.90
2006-07	3.50	0.37	2.35	5.85
2007-08	3.71	0.31	3.29	7.00
2008-09	3.34	0.35	1.66	5.00
2009-10	3.43	0.38	1.92	5.35
2010-11	3.45	0.40	2.35	5.80
2011-12	3.27	0.39	2.17	5.44
2012-13	2.69	0.31	1.60	4.28
2013-14	2.34	0.33	1.44	3.78
2014-15	1.92	0.18	1.56	3.48
2015-16	1.13	-	0.70	1.82
2016-17 ^b	0.85	-	0.77	1.62
2017-18	0.49	-	0.26	0.75
2018-19	0.54	-	0.45	0.99
2019-20	0.64	-	0.38	1.02
2020-21	0.60	0.05	0.29	0.89
2021-22 ^p	0.48	0.05	0.27	0.75
2022-23 ^f	0.41	0.04	0.25	0.70

p = preliminary.

f = Forecast (based on the USDA production forecast for 2022-23 season released on October 12, 2022).

a Processed boxes are utilized for orange juice, except some tangerines utilized to 100% produce tangerine juice.

b Starting in the 2016-17 season, Royal tangerines (formerly Temple) reported with specialty.

Table 24. Destination markets for Florida certified fresh specialty shipments.

Table 24. Destination markets for Florida certified fresh specialty shipments.								
Season	Exports		Domestic				TOTAL ^b	
(Aug- July)	Overseas	Canada	South	Northeast	Central	West		
----- million 45-pound cartons -----								
								--- millions 90- pound boxes-- --
2004-05	0.09	0.34	2.43	2.19	1.12	0.87	7.05	3.52
2005-06	0.09	0.39	2.75	2.35	1.17	0.88	7.63	3.81
2006-07	0.01	0.43	2.55	2.14	1.29	0.20	6.61	3.30
2007-08	0.01	0.41	2.82	2.47	1.20	0.16	7.07	3.53
2008-09	0.00	0.33	2.40	2.22	1.16	0.14	6.25	3.12
2009-10	0.05	0.33	2.45	1.97	0.95	0.60	6.35	3.17
2010-11	0.10	0.30	2.47	1.96	0.99	0.55	6.36	3.18
2011-12	0.04	0.24	2.42	1.82	0.89	0.55	5.95	2.98
2012-13	0.05	0.21	2.04	1.48	0.72	0.42	4.93	2.46
2013-14	0.03	0.16	1.70	1.33	0.62	0.37	4.20	2.10
2014-15	0.03	0.13	1.53	1.19	0.48	0.26	3.61	1.80
2015-16	0.01	0.06	0.99	0.81	0.32	0.17	2.37	1.19
2016-17	0.02	0.04	0.72	0.61	0.20	0.13	1.72	0.86
2017-18	0.00	0.01	0.41	0.30	0.09	0.05	0.87	0.43
2018-19	0.01	0.03	0.48	0.31	0.09	0.06	0.98	0.49
2019-20	0.01	0.03	0.58	0.31	0.11	0.11	1.14	0.57
2020-21	0.01	0.02	0.63	0.23	0.08	0.12	1.10	0.55
2021-22p	0.01	0.01	0.55	0.17	0.06	0.07	0.88	0.44
2022-23f	0.01	0.02	0.46	0.19	0.06	0.08	0.81	0.41

p = preliminary.

f = Forecast (based on the USDA production forecast for 2022-23 season released on October 12, 2022).

Source: Division of Fruit and Vegetable Inspection Service, Florida Department of Agriculture.

a Includes some offshore exports not destined for Europe.

b May not add up due to rounding.

