



Florida Citrus Season Retrospective: 2024-25 Season Final Season Outlook Update

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Florida Citrus Outlook

2024-25 Season: September Update

Introduction

This report provides the final season update on supply, demand, and price projections of Florida citrus for the 2024-25 season. On August 29, 2025, the USDA's National Agricultural Statistics Service (USDA/NASS) released the preliminary 2024-25 Citrus Production Forecast for the Florida citrus crop, by variety, which provides the baseline for these projections. This report examines utilization of oranges, grapefruit, and specialty citrus in line 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 also presented, given its strong bearing on Florida's OJ situation. Fresh fruit movement projections are included as well. Sensitivity analyses assess alternative scenarios for availability and movement where appropriate.

The preliminary estimate for the 2024-25 Florida citrus season is 13.85 million boxes (not including lemons), an estimated 31.4% decline in total Florida citrus production of oranges, grapefruit, and tangerines. The forecast for total U.S. citrus production for the 2024-25 season indicates production will decrease overall by 0.9% with a total of 126.7 million boxes of oranges, grapefruit, lemons, and specialty citrus from California, Florida, Texas, and Arizona. Specifically, the preliminary forecast projects 62.00 million boxes of oranges, 7.60 million boxes of grapefruit, and 28.40 million boxes of specialty tangerines and tangelos. The USDA preliminary estimates for California, Arizona, and Florida lemon production is 28.79 million boxes of lemons in the 2024-25 season, (USDA-NASS, 2025a).

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 2023-24 Florida Citrus Season

This section provides an overview of trends from the 2023-24 season that may impact the outlook for the 2024-25 season. The most significant events affecting the Florida 2024-25 citrus season continued to be weather-related, namely Hurricane Milton's impact as it crossed through Florida's citrus producing regions on October 9, 2024. The full impact of the hurricane on the 2024-25 crop has yet to be fully assessed.

The production crop for the 2023-24 Florida citrus season is 20.20 million boxes, an estimated 11.7% increase in total Florida citrus production of oranges, grapefruit, and tangerines. The updated estimate for total U.S. citrus production for the 2023-24 season indicates production increased overall by 9% with a total of 128.53 million boxes of oranges, grapefruit, lemons, and specialty citrus from California, Florida, Texas, and Arizona. Specifically, the September preliminary estimate projects 66.64 million boxes of oranges, 8.49 million boxes of grapefruit, and 27.85 million boxes of specialty tangerines and tangelos. The USDA forecast also anticipates that California and Arizona will produce 25.55 million boxes of lemons in the 2023-24 season (USDA-NASS, 2025a).

The season ending USDA-NASS September 2024 estimate for the Florida round orange crop in the 2023-24 season, released on August 29, 2024, was 17.96 million boxes, an increase of 2.16 million boxes, or 14% more than the previous season's crop of 15.8 million boxes. However,

¹ USDA National Agricultural Statistics Service, Florida Field Office. "Citrus Production March Forecast" https://www.nass.usda.gov/Statistics_by_State/Florida/Publications/Citrus/; Net pounds per box: oranges in California-80, Florida-90, Texas-85; grapefruit in California and Texas-80, Florida-85; lemons-80; tangerines and mandarins in California-80, Florida-95.

Florida's total round orange production was below the reported 41.2 million boxes in the 2021-22 season.

In addition, the industry continues to experience considerable drop rates, declines in production associated with fewer bearing trees compared to the previous year, and fewer pieces of fruit per tree across all varieties. The early-midseason orange fruit drop rate, excluding navels, was 43% compared to a 39% drop rate during the 2021-22 season. The drop rate for navel oranges was 37% compared to a 28% drop rate during the 2021-22 season. The drop rate for Valencia oranges was 50%, compared to the 51% drop rate during the 2021-22 season and a 41% drop rate during the 2020-21 season (USDA-NASS, 2023b).

The USDA/NASS September preliminary estimate for the 2023-24 Florida round orange crop is 17.96 million boxes, which would represent an increase of 13.7%, or equivalent to 2.2 million more boxes compared to last season's crop of 15.8 million boxes. Table 2 reports Florida orange box utilization. The 2023-24 early and mid-season orange crop preliminary estimate, including Navel oranges, is 6.76 million boxes, up 0.61 million boxes (or an increase of 9.9%) from last season. The navel orange crop is estimated at 180,000 boxes, representing 2.7% of the total early and mid-season orange crop estimate. The Valencia crop preliminary estimate is 11.2 million boxes, a projected 16.1% increase over last season's Valencia production of 9.67 million boxes.

Approximately 90.8% of orange production was used on the processed market. The share 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 12.85 million boxes (or 78.8% of total processed utilization) in the 2023-24 season, a decrease of 0.11 million boxes from last season despite the increase in the crop. The quantity of orange boxes utilized in 2023-24 to produce FCOJ

is estimated at 3.46 million boxes, an increase of 2.11 million boxes over last season's utilization of 1.35 million boxes. Higher futures prices may have contributed to the higher share of orange crop utilization into FCOJ. Certified fresh orange shipments in 2023-24 are estimated at 1.69 million boxes, up 13% from the 1.49 million boxes shipped last season. Florida's processed orange utilization is estimated at 16.26 million boxes, an increase of 14.0% over last season's utilization of 14.26 million boxes.

The total juice yield for Florida processed production is roughly estimated to be 4.725 SSE gallons per box for the 2024-25 season based on Florida processor combined SSOJ and FCOJ juice yield and reported boxes.

Compared to the prior season, global availability of orange juice experienced further declines. The main orange juice producing countries (Brazil, Mexico, and the United States) witnessed a slight increase in production overall due to higher orange production in Brazil. Nevertheless, a general decrease in worldwide combined inventory projections resulted in a drop in the availability of orange juice globally by about 5%. The decline in availability in recent seasons has created uncertainty concerning the supply needed for processors to meet market demand for both NFC and concentrate orange juice. Aggregate OJ supplies from the three leading suppliers in 2023-24 is projected at 1.98 billion SSE gallons, a decrease of 86.3 million SSE gallons (or down 4% from last season's 2.07 billion SSE gallons) largely due to the decline in beginning inventories, reduced juice yields, and declines in Brazil's orange production. Global trade of orange juice must incorporate inventories along with production each season. Additionally, demand for orange juice in the United States must compete with demand in other markets around the world. While the vast majority of U.S. orange juice production is consumed domestically, Brazilian and Mexican orange juice production is primarily intended for the world

market. Even though there was a slight increase in the share of Brazil's exports to the United States over the previous three seasons, Brazil continued to be the leading source of orange juice in Europe.

The USDA-NASS September 2023 estimate for the Florida grapefruit crop in 2023-24 is 1.79 million boxes, a decrease of 1.1% from last season's crop of 1.81 million boxes. Florida grapefruit production suffered losses of more than 86% since the 2005-06 season due to hurricanes and HLB. The share of certified fresh grapefruit shipments has increased, with an estimated 1.17 million boxes in 2023-24, representing a 13% increase compared to last season's certified fresh utilization. Non-certified fresh utilization is forecasted at 30,000 boxes in 2023-24. Processed utilization is projected to account for approximately 33% of the total crop and is estimated at 589,000 boxes, a decline of about 14% compared to the 2022-23 season. The remaining 30,000 boxes are designated as other processed utilization. This outlook assumes that utilization of the processed grapefruit crop into single-strength grapefruit juice (SSGJ), used to make NFC grapefruit juice, is reported to account for nearly 100% of processed utilization.

Combining initial inventories with production, the projected availability of GJ in 2023-24 stands at 19.2 million SSE gallons, marking a 15% decrease and a drop of 3.36 million gallons compared to the previous season. The preliminary 2023-24 ending inventory for Florida GJ is estimated at 7.98 million SSE gallons (or 35 weeks supply).

Meanwhile, Florida's certified fresh grapefruit utilization accounted for approximately 65% of total grapefruit production during the 2023-24 season, a much higher share than in previous years. Certified fresh grapefruit shipments in 2023-24 totaled 1.17 million boxes, representing a 13% increase compared to the previous season, despite an overall 1.1% decline in the crop. The average domestic share of fresh grapefruit shipments had historically been around 42%, then rose

steadily from 47% in 2017-18 to 89% in the 2023-24 season. Of the 2.34 million cartons of fresh grapefruit shipped this season, 2.09 million cartons were shipped domestically. Florida exported 250,179 cartons of certified fresh grapefruit during the 2023-24 season, representing a decline of 31% compared to last season. Florida fresh grapefruit was shipped to various export markets in Asia, Europe, and Canada.

The preliminary estimate for the 2023-24 Florida specialty citrus crop production is 450,000 boxes, a decrease of 30,000 boxes from last season. Despite higher freight on board (FOB) prices in recent years, specialty production has declined more than 94% since the 2004-05 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 68% of the crop with 304,718 boxes (equivalent to 609,437 cartons) moving during the 2023-24 season, primarily to the domestic market.

The 2023-24 citrus season in Florida was marked by a combination of challenges, resilience, and ongoing adaptation by the state's growers. This year was shaped by multiple factors that influenced production, processing, and overall market dynamics for Florida's iconic citrus. As such, 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. Recognizing the importance of this \$6.9 billion industry, Florida will need to continue making strategic investments in replanting efforts today to ensure a more resilient and productive future. Furthermore, in today's consumer landscape, there's a growing recognition of the challenges posed by price increases amid supply shortages. These facts emphasize the importance of reinforcing

consumer awareness of the benefits of citrus products and alleviating concerns about rising prices. It's imperative to foster and support the demand for orange juice through strategic marketing.

Florida Orange Crop, Utilization and Movement

This section provides an overview of world orange production and utilization trends that may have an impact on the Florida citrus industry outlook during the 2024-25 season based on the most recent information. Table 1 provides estimates of the orange utilization and outlook of the world's 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 is expected to decline by 14.1% with the United States, Brazil, and Mexico expected to produce approximately a combined 481.5 million 90-lb equivalent boxes in the 2024-25 season.

Specifically, the United States is expected to produce 56.5 million 90-lb equivalent boxes, Brazil is expected to produce 301.3 million 90-lb equivalent boxes, and Mexico is expected to produce an estimated 123.7 million 90-lb equivalent boxes in the 2024-25 season. The data suggests that approximately 65.8% of production in these countries will be utilized for processing, which represents a projected 11.0% decline over last season. The remainder of this section examines utilization within each country.

Florida

The USDA/NASS preliminary September estimate for the 2024-25 Florida round orange crop is 12.2 million boxes, which would represent a decline of 32.3%, equivalent to 5.8 million boxes compared with last season's crop of 18.0 million boxes. Table 1 reports Florida orange box utilization. The 2024-25 early- and mid-season orange crop forecast, including Navel oranges, is 4.6 million boxes, down 2.2 million boxes (a decline of 32.0%) from last season. The Navel orange crop is forecast at 100,000 boxes, representing 2.2% of the early- and mid-season estimate. The

Valencia crop is forecast at 7.6 million boxes, a projected 32.6% decrease from last season's Valencia production of 11.2 million boxes.²

The 2024-25 preliminary estimate suggests that approximately 91.1% of orange production was utilized in the processed market. The number of round orange boxes directly used for single-strength orange juice (SSOJ), which is used to make not-from-concentrate (NFC) orange juice, is estimated at 7.16 million boxes (or 65.0% of total processed utilization) in the 2024-25 season, a decrease of 5.40 million boxes from last season. The quantity of orange boxes used in 2024-25 to produce FCOJ is estimated at 3.85 million boxes, an increase of 0.39 million boxes compared with last season's utilization of 3.46 million boxes.

The total juice yield for Florida processed production is roughly estimated to be 4.794 SSE gallons per box for the 2024-25 season, based on an evaluation of currently available production data for combined SSOJ and FCOJ juice yield and reported boxes from Florida processors. 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 the majority of production reaching markets in Europe, North America, and Asia. Orange juice production in the State of São Paulo and the West-Southwest Minas Gerais citrus belt, where most of Brazil's oranges for processing are grown, decreased by roughly 27% compared to last season, from 307.2 million 90-lb equivalent boxes to 230.9 million 90-lb equivalent boxes, representing a reduction of 76.4 million boxes. The current estimates for the São Paulo orange crop, as reported by Fundecitrus, are found in Table 3. The juice yield for São Paulo production is roughly estimated to be 4.788

² One Florida orange box weighs 90-lb.

SSE gallons per box for the 2024-25 season based on an evaluation of currently available production and movement data. An overview of historical juice yields is reported in Table 4.

In addition to lower production, fruit quality issues have further constrained the industry, impacting juice yields and exports. According to an industry update from Cepea-Brazil in March, the 2024-25 crop experienced multiple blossoming cycles, leading to variations in fruit maturity and a lower-than-desirable brix-acid ratio for processing. As a result, not-from-concentrate (NFC) orange juice exports have underperformed compared to the previous season, with shipments from July 2024 to January 2025 totaling 1.09 million tons, a 3.4% decline year-over-year. Concurrently, international orange juice prices softened, contributing to downward pressure on industry returns.³

Mexico

Mexico is the second leading exporter of orange juice. The share of its orange production into the processing sector and its exports have 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 fresh fruit consumption in the 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.

³<https://cepea.esalq.usp.br/en/brazilian-agribusiness-news/low-quality-and-international-price-drops-press-down-values-to-the-industry.aspx>

Without official estimates, this Outlook considers recent trends in production and review information from industry sources. Final estimates rely on USDA-FAS production, supply, and demand data and are to be considered approximations. Orange processed production in Mexico remained essentially unchanged, declining slightly from 56.4 to 56.3 million 90-lb equivalent boxes. The estimates for the Mexico orange crop are based on the most current data reported by USDA/FAS and are found in Table 3. The juice yield for Mexico production is roughly estimated to be 4.622 SSE gallons per box for the 2024-25 season and is based on an evaluation of currently available production and movement data provided by USDA/FAS. However, it is important to note that the juice yield has not fluctuated in recent years, indicating a lack of official estimates emerging from Mexico. 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. Historically, about 80-85% of California and Texas oranges are sent to the fresh market. However, in recent years, processed share has increased. During the 2020-21 season, for example, California fresh utilization is estimated at 74% and Texas utilization is estimated at 76%, with the remainder going into processed. During the 2021-22 season, California fresh utilization is estimated to increase to an 82% share with Texas fresh utilization hovering around a 58% share and the remainder going into processed. During the 2022-23 season, California fresh utilization is estimated at 77% share with the share of Texas fresh orange utilization at 75%. During the 2021-22 season, 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 2024-25 season, California is expected to produce 41.0 million 80-lb boxes of non-Valencia oranges and 8.0 million 80-lb boxes of Valencia oranges, for a total of 49.0 million boxes, an increase of 3.2% compared

to last season. As many as 13.0 million boxes are estimated to be processed into juice based on prior utilization rates. The USDA/NASS forecast for Texas orange production in the 2024-25 season is projected to decrease by 28.0% to 0.85 million 85-lb boxes. The Texas crop share into processed utilization could represent as many as 0.276 million 85-lb boxes. This analysis estimates that up to 11.8 million 90-lb Florida-equivalent boxes of combined California and Texas production may be used for orange-juice processing. The share of single-strength and concentrate is not reported by either state. This analysis projects that orange-juice production may decrease by approximately 24.8% from an estimated 69.9 million SSE gallons in the 2023-24p season to 52.6 million SSE gallons in the 2024-25 season.

Orange Juice Production and Availability

This section describes 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, São Paulo, and Mexico based on their respective production seasons. For the 2024-25 Florida season, the estimated total supply of orange juice on the world market is projected to decrease by 22.8% over the previous period, from 1.68 billion SSE gallons to 1.29 billion SSE gallons due to reduced availability in production from leading suppliers such as São Paulo, Mexico, and the United States (Table 5). Florida production is estimated to contribute 4.1% of orange juice to this total supply this season.

Global trade is subject to fluctuations driven by shifts in supply. Both the U.S. and Brazil rely on their current inventory levels to satisfy market demand. Mexico is a key supplier to the U.S. market; however, there is limited evidence to indicate that it maintains a consistent inventory across seasons. In recent seasons, both Brazil and Mexico have emerged as formidable suppliers

of NFC orange juice to the United States, which has contributed to a displacement of FCOJ among declining supplies. However, to meet the demand, orange juice stocks have fallen below optimal levels in recent years, leading to an overall reduction in availability.

Comparisons of orange juice beginning inventories and production levels for Florida, Brazil, and Mexico are provided in Table 6. Aggregate OJ production from the three leading suppliers in 2024-25 is projected at 1.63 billion SSE gallons, a decrease of 358.4 million SSE gallons (or down 18.1% from last season's 1.98 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 market for the leading suppliers. While the vast majority of U.S. orange juice production is consumed domestically, Brazil 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 1.09 billion SSE gallons of OJ were exported from Brazil in 2024-25, down 23.0% from the 1.42 billion SSE gallons exported in the 2023-24 season. Most of Brazil's orange juice exports are bound for Europe, with shipments to Europe during the 2024-25 season estimated at 555.0 million SSE gallons (representing approximately 51% of all exports), an estimated 25.6% decline compared to last season. Most of Brazil's exports to Europe are frozen concentrate, representing 70% of the total in the 2024-25 season with NFC exports 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 down by 54.2% with 76.0 million SSE gallons. Brazil's exports to North American (USMCA) countries were down by 3.4% with 436.8 million SSE gallons, primarily intended for the U.S. market. A declining share,

approximately 39%, of these exports in the 2024-25 season were frozen concentrate, used to make reconstituted, shelf-stable, and frozen orange juice, reinforcing a rise in the NFC export market to USMCA.

Table 8 provides a summary of U.S. imports of orange juice by origin and type. For FCOJ, imports through Florida Ports decreased from 198.59 million gallons in the 2023-24 season to 184.44 million gallons in the 2024-25 season, representing a decrease of 14.15 million gallons. Yet, imports from Brazil increased from 79.80 million gallons to 120.58, showing an increase of 40.77 million gallons. On the other hand, imports from Mexico decreased from 99.97 million gallons to 52.46, representing a reduction of 47.51 million gallons. In total, FCOJ imports declined from 276.73 million gallons in 2023-24 to 238.49 million gallons in 2024-25, indicating a decrease of 38.24 million gallons. For NFC-OJ, imports through Florida Ports declined from 220.15 million gallons in the 2023-24 season to 144.91 million gallons in the 2024-25 season, indicating a decline of 75.23 million gallons. Imports from Brazil, which is a significant contributor to NFC-OJ imports, also fell from 207.54 million gallons to 134.23, representing a decrease of 73.32 million gallons. In total, NFC-OJ imports decreased from 261.66 million gallons in 2023-24 to 178.86 million gallons in 2024-25, indicating a reduction of 82.80 million gallons.

Florida Orange Juice Inventory and Movement

Both demand-side and supply-side factors influencing orange juice availability are analyzed in this section. Florida's orange juice (OJ) situation continued to be hampered by the historical trend in reduced production levels largely associated with the spread of Huanglongbing (HLB, also known as citrus greening) and weather related events. Concurrently, consumer demand for orange juice may have outpaced juice receipts from the Florida crop and imports during the previous season, guaranteeing that existing inventories will be needed. Simultaneously, the

inflationary pressures within the category resulting from shortages and the high cost of production raise concerns that consumers might be opting for alternatives due to elevated prices.

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 adjusted for Florida processor trends. Three scenarios for 2024-25 are provided, varying with respect to Florida processor imports.

The 2023-24 Florida citrus season concluded with a year-over-year reduction in combined SSOJ and FCOJ inventories from the previous season. Combined Florida OJ ending inventory for the 2023-24 season is 163.6 million SSE gallons or 15.5 weeks of supply, compared to 16.7 weeks in the previous 2022-23 season. Adding the 2023-24 ending inventory to the 2024-25 estimate of Florida OJ production of 52.8 million SSE gallons, plus estimated imports and other adjustments totaling 466.0 million SSE gallons, Florida's OJ availability in 2024-25 (October 2023 through September 2024) is estimated at 682.4 million SSE gallons, down 45.4 million SSE gallons (or 6.2%) from last season's level. Total movement in 2024-25 is estimated to decline by 76.7 million SSE gallons (or 13.6%) to 487.4 million SSE gallons from last season. By the end of the 2024-25 season, Florida's OJ ending inventory is estimated to increase to 195.0 million SSE gallons (or 20.8 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 2024-25 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 157.4 million SSE gallons (16.8 weeks supply) to 232.6 million SSE gallons (24.8 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 revises initial projections from October 2024. The 2024-25 preliminary estimate suggests that approximately 34.8% of Florida processed orange utilization will be processed as FCOJ during the 2024-25 season. Preliminary estimates place beginning Florida processor inventories of FCOJ for the 2024-25 season at 66.9 million SSE gallons, a decrease of 2.2% compared with the previous season. Florida processor FCOJ production is projected at approximately 17.8 million SSE gallons, based on an estimated utilization of 3.85 million boxes of round oranges and an average FCOJ juice yield of 4.63 gallons per box in the 2024-25 season. Imports of FCOJ, which are used to make recon, shelf-stable, and frozen orange juice, are projected to decrease by 2.3% to 209.3 million SSE gallons. Total overall FCOJ availability is projected to increase by 0.2% when compared with the 2023-24 season. Preliminary total movement is projected to decline by at least 13.0% as a result of the change in availability. Based on the estimated utilization, receipts, and movement trends, FCOJ ending inventories are currently projected to increase by the end of the season to approximately 99.6 million SSE gallons (or 24.0 weeks of supply).

Preliminary estimates suggest that approximately 64.7% of Florida processed orange utilization during the 2024-25 season was processed as SSOJ, which is used for NFC orange juice. At the onset of the 2024-25 season, beginning Florida processor inventories of SSOJ were 96.7 million SSE gallons (16.8 weeks supply), a decrease of 16.4% when compared to the previous season. Florida processor SSOJ production is estimated at approximately 35.0 million SSE gallons based on an estimated utilization of 7.16 million boxes of round oranges and an average juice yield of 4.88 SSE gallons per box, which would be a decrease of 41.2% compared to the pack last season.

Imports and domestic receipts of SSOJ are projected to increase by 6.0% to 215.8 million SSE gallons. Total overall SSOJ availability is projected to decline by 7.6% when compared to the 2023-24 season. Total movement, including EVAP into Recon, is projected to decline by at least 9.5% with a majority of SSOJ consumed through retail channels. Based on the estimated utilization, receipts, and movement trends, SSOJ ending inventories are projected to decrease by the end of the season to approximately 92.5 million SSE gallons (or 18.2 weeks of supply).

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

The volume of orange juice disappearance, derived from comprehensive inventory data tracking, orange juice produced from the current crop, imports, exports, and ending inventory, serves as a pivotal measure in this analysis, offering insights into the availability of orange juice to meet consumer demand and serves as a proxy for presumed consumption.

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.

Disappearance is used in this analysis to discuss orange juice availability to meet demand. Preliminary estimates of total U.S. OJ disappearance are projected at 592.1 million SSE gallons for the 2024-25 season, a projected decline of 13.1% from an estimated 681.5 million SSE gallons consumed in the previous season (Table 12). The projected reduction in consumption reflects both a contraction in supply on the domestic market and changes in distribution channels. Total U.S. OJ production is estimated at 145.2 million SSE gallons based on the preliminary USDA estimated

for the orange crop in Florida, California, and Texas (NASS/USDA, 2021a). Total U.S. OJ imports are projected at 546.6 million SSE gallons, a projected decrease of 1.3% compared to last season. The projected decline in total U.S. imports may reflect the surplus inventories held over due to decline in foodservice movement. U.S. exports are projected at 30.6 million SSE gallons, a 14.9% decrease over last season.

Preliminary estimates of total U.S. orange juice disappearance are projected at 592.1 million SSE gallons for the 2024-25 season, a projected decline of 13.1% from an estimated 681.5 million SSE gallons consumed in the previous season (Table 12). The projected reduction in consumption primarily reflects supply-side constraints and changes in distribution channels dating back to the 2020-21 season. Total U.S. orange juice production is estimated at 104.8 million SSE gallons based on the preliminary USDA estimate for the orange crop in Florida, California, and Texas (NASS/USDA, 2025a). Total U.S. orange juice imports are currently projected at 546.6 million SSE gallons, a projected decrease of 1.3% over the previous season. The projected decline in total U.S. imports may reflect surplus inventories held over due to a decline in foodservice movement. U.S. exports are projected at 30.6 million SSE gallons, a 14.9% 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 2024-25 Florida citrus season, Florida orange production is projected to account for 12% of SSOJ and 8% of FCOJ receipts by processors, respectively. Specifically, Florida processors are expected to receive 35.0

million gallons of SSOJ from Florida production and 251.4 million gallons from other sources. Florida processors are expected to receive 18.8 million gallons of FCOJ from Florida's orange crop with a remaining 230.7 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 food service 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/Defense Commissary Agency (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 2024-25 season was largely dependent upon juice availability, market contraction, and substitutes not yet fully assessed, including OJ blends and OJ drinks. In forecasting orange juice sales, it was assumed that consumer behavior during 2024 would continue into the 2024-25 season, despite ongoing concerns over high inflation. The forecasting model also considered the global orange juice shortage, as well as recent resizing of the most popular container size from 52 oz to 46 oz for a significant share of the sales. The container size change was expected to decrease demand for NFC due to consumers perceiving less value in smaller packaging, while increasing the price per gallon in the upcoming year. The shift also contributed to volume loss. Recon orange juice experienced significant changes in both price and demand during the 2023-24

season, and while this trend is expected to continue, it is likely to do so at a reduced rate in the next season. Estimated preliminary price projections are based on the mid-price scenario, with a sensitivity analysis provided for three price scenarios in Table 14.

Under Scenario 2 (the mid-price projection), the average OJ retail price is estimated to rise from \$9.58 per gallon in 2023-24 to \$10.81 per gallon in 2024-25, a 13% increase. The higher price is associated with lower retail sales volume due to supply constraints and reduced container sizes. In 2024-25, orange juice sales within Nielsen retail outlets are estimated at 281.7 million equivalent gallons at that price, down 11.5% from the previous season's 318.27 million SSE gallons, based on an average price of \$10.81 per equivalent gallon.

Preliminary estimates of sales by segment (FCOJ, NFC, and RECON) are also shown in Table 14. The preceding preliminary estimates represent a 65.6% NFC market share of total OJ category sales volume, RECON market share estimated at 28.5% of total OJ category sales volume, FCOJ market share estimated at 3.5% of total OJ category sales volume, with remaining shares allocated to shelf stable. Estimates of sales by segment (NFC, RECON, FCOJ, and Other types of OJ) are also shown in the table. Retail prices for NFC, RECON, FCOJ, and Other OJ (mostly shelf stable) are projected to increase in all scenarios for the 2024-25 season, leading to declines in sales volumes.

Orange juice sold on trade promotion at retail has been at historically low levels for the last couple of years, contributing to the increase in the average price. 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 the regular price. If the lower price persists over 13 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 orange juice sold on promotion with corresponding price per equivalent gallon is reported in Table 15.

Table 15 summarizes retail orange juice promotions across multiple store formats, including grocery stores, mass merchandisers, and others, for the 2023-24 and 2024-25 seasons. During the 2024-25 season, promotional activity for NFC orange juice accounted for 23.5% of total sales, which is a decrease from 29.5% in the 2023-24 season. Recon orange juice saw promotional activity at 22.1% of total sales in 2024-25, compared to 22.1% in the previous season, indicating slight change. Overall, total promotional sales represented 22.2% of all orange juice sales during 2024-25, compared to 26.0% in 2023-24. For orange juice sold without promotions, NFC sales were at 76.5% of total sales in 2024-25, compared to 70.5% in the previous season. Recon orange juice accounted for 77.9% of non-promotional sales in 2024-25, which is unchanged compared to 77.9% in 2023-24. Total non-promotional sales increased from 74.0% in 2023-24 to 77.8% in 2024-25. The average price for NFC orange juice sold on promotion increased from \$9.44 per SSE gallon in 2023-24 to \$10.26 in 2024-25. Recon orange juice sold on promotion had an average price of \$8.37 in 2024-25, compared to \$7.42 in 2023-24. For non-promotional sales,

NFC orange juice was priced at \$11.91 per SSE gallon in 2024-25, compared to \$10.88 in the previous season, while Recon prices changed from \$8.12 to \$9.50 per SSE 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 8.0% of total orange production during the 2024-25 season. Certified fresh orange shipments in 2024-25 are estimated at 0.97 million boxes (equivalent to 1.94 million cartons), which would be a decrease of 42.6% from the 1.69 million boxes (equivalent to 3.37 million cartons) shipped last season despite the overall decline in Florida orange production in the 2023-24 season. Domestic fresh orange shipments are projected at 1.90 million cartons, down by 1.3 million cartons. The domestic share is projected to be about 98% of all Florida fresh orange shipments in 2024-25. Florida packers are projected to export 33,435 cartons of fresh oranges during the 2024-25 season, representing a decline of -76.7% compared to last season. Accounting for 69% of all exports, Canada was the leading destination of Florida fresh oranges.

Florida Grapefruit Crop, Utilization and Movement

The USDA/NASS September preliminary estimate of the Florida grapefruit crop in 2024-25 is 1.30 million boxes, a decrease of 27.4% from last season's crop of 1.79 million boxes (Table 17). Florida grapefruit production has suffered losses of more than 95% since the 2006-07 season due to the harmful impacts of hurricanes and HLB. Certified fresh grapefruit shipments are estimated to be 871,580 boxes in 2024-25, which would represent a decline of about 26% compared to certified fresh utilization last season. Non-certified fresh utilization is forecasted at 17,421 boxes in 2024-25. Processed utilization is projected to account for approximately 29% of the total crop and is estimated at 377,340 boxes, a decline of about 35.5% compared to the 2023-

24 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 as much as 99% of processed utilization with an estimated 0.38 million boxes used this season, which represents a decrease of about 35.8% compared to last season. Utilization of the processed grapefruit crop into frozen concentrated grapefruit juice (FCGJ) is estimated to be less than 2,000 boxes in 2024-25.

Florida Grapefruit Juice Inventory and Movement

Preliminary projections for the Florida OJ situation (October-September season) are shown in Table 18. Florida processors began the 2024-25 season with 8.11 million SSE gallons of GJ in inventory (35.0 weeks supply), down from the previous season's level of 9.58 million SSE gallons (39.6 weeks supply based on average movement at that time). Combined GJ production plus processor imports, both domestic and foreign, in 2024-25 are currently estimated at 7.23 million SSE gallons, down 2.34 million SSE gallons from last season. Combining production with beginning inventories, GJ availability in 2024-25 is estimated at 15.3 million SSE gallons, down by 19.9% and representing a decrease of 3.80 million gallons from last year. GJ movement in 2024-25 is currently estimated at 9.67 million SSE gallons, down 18.6% from last year. The 2024-25 ending inventory for Florida GJ is currently estimated at 5.67 million SSE gallons (or 30.5 weeks supply). Table 18 also describes the availability, movement, and inventory estimates for FCGJ and single-strength grapefruit juice (SSGJ) projected for the 2024-25 season.

Florida processors utilized 99.5% of processed grapefruit for SSGJ (or GJ NFC). Beginning inventory of SSGJ for the 2024-25 season is down by 6.3% over the previous season at 5.81 million SSE gallons (30.24 weeks supply). Production from Florida fruit is currently estimated at 1.75 million SSE gallons based on an estimated 0.38 million boxes of grapefruit and

a juice yield of 4.650 SSE gallons per box, representing a 42.3% decrease in pack from fruit over the previous season. Florida processors utilized less than 2,000 boxes of processed grapefruit for FCGJ, representing just 0.05% of processed utilization. Florida processors utilized 0.5% of processed grapefruit for FCGJ. Beginning inventory of FCGJ for the 2024-25 season is down by 32.0% over the previous season at 2.30 million SSE gallons (63.39 weeks supply). Production from Florida fruit is estimated at less than 10,000 SSE gallons. Exports in 2024-25 are currently estimated at 0.03 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

The volume of grapefruit juice disappearance, derived from comprehensive inventory data tracking, grapefruit juice produced from the current crop, imports, exports, and ending inventory serves as a pivotal measure in this analysis, offering insights into the availability of grapefruit juice to meet consumer demand and serves as a proxy for presumed consumption.

Presumed consumption is a rough measure of market performance reflecting grapefruit juice movement in which the disappearance of grapefruit 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 GJ consider Florida processor ending inventories and industry sources for the rest of the United States. The measure considers combined grapefruit juice types in which not-from-concentrate grapefruit juice and frozen concentrated grapefruit juice are not disaggregated.

U.S. disappearance of GJ is currently estimated to be 17.47 million SSE gallons in 2024-25, compared to 18.89 million SSE gallons in the previous season (Table 19). Disappearance is projected to decline by 8% between the 2023-24 season and the 2024-25 season, but may be overstated as previous season estimates would have included cold storage supplies not tracked within the FDOC Florida processor database or by USDA cold storage estimates. Total U.S. GJ production is currently estimated to be 12.76 million SSE gallons based on Florida processor data and the USDA forecast of the grapefruit crop in California and Texas. The projected decline in disappearance for the 2024-25 season is consistent with the decline in availability coupled with weakening market growth. Total U.S. GJ imports are currently estimated at 6.04 million SSE gallons, a decrease of 20% over the previous season. U.S. exports are currently estimated to be 4.16 million SSE gallons based on analysis of Florida processor statistics.

Other U.S. grapefruit comes primarily from California and Texas, with utilization intended for both fresh and processed consumption. According to the USDA/NASS citrus production forecast for the 2024-25 season, California is expected to produce 4.3 million 80-lb boxes of grapefruit, unchanged compared with the previous season. Close to 1.6 million boxes are estimated as processed into juice this season based on prior utilization rates. The USDA/NASS citrus production forecast for Texas grapefruit in the 2024-25 season is projected to decrease by 16.7% to 2.0 million 80-lb boxes. The Texas crop share into processed utilization could represent close to 0.9 million 80-lb boxes. This analysis estimates that up to 2.4 million 90-lb Florida-equivalent boxes of combined California and Texas production may have been used for processing 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 13.4% from an estimated 12.7 million SSE gallons in the 2023-24 season to 11.0 million SSE gallons in the 2024-25 season.

In addition to GJ prices, retail sales of GJ during the 2024-25 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 decline in the 2024-25 season with estimates of sales by segment (FCGJ, NFC, and RECON) shown in Table 20. The estimated sales reflect market share of NFC GJ will be 68% of retail sales volume, Shelf Stable market share estimated at 29% of retail sales volume, Recon GJ market share estimated at 2% of retail sales volume, and remaining shares allocated to FCGJ have diminished to nearly zero. 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.

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 the regular price. If the lower price persists over thirteen 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).

Under Scenario 2 (the mid-price projection), the average GJ retail price is estimated to rise from \$10.82 per gallon in 2023-24 to \$11.78 per gallon in 2024-25, a 9% increase. The higher price is associated with lower retail sales volume due to supply constraints. In 2024-25, grapefruit juice sales within Nielsen retail outlets are estimated at 9.2 million equivalent gallons at that price, down 8% from the previous season's 10 million SSE gallons, based on an average price of \$11.78 per equivalent gallon.

Preliminary estimates of sales by segment (FCGJ, NFC, and RECON) are also shown in Table 20. The estimates project market share of NFC GJ will be 68% of retail sales volume, Shelf Stable market share estimated at 29% of retail sales volume, FCGJ market share estimated at 0% 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.

Table 21 summarizes retail grapefruit juice promotions across multiple store formats, including grocery stores, mass merchandisers, and others, for the 2023-24 and 2024-25 seasons. During the 2024-25 season, promotional activity for NFC grapefruit juice accounted for 30.7% of total sales, which is an increase from 30.6% in the 2023-24 season. Recon grapefruit juice saw promotional activity at 12.1% of total sales in 2024-25, compared to 12.7% in the previous season, indicating a slight decline. Overall, total promotional sales represented 24.8% of all grapefruit juice sales during 2024-25, compared to 25.1% in 2023-24. For grapefruit juice sold without promotions, NFC sales were at 69.3% of total sales in 2024-25, compared to 69.4% in the previous season. Recon grapefruit juice accounted for 87.9% of non-promotional sales in 2024-25, which is slightly higher compared to 87.3% in 2023-24. Total non-promotional sales increased from 74.9% in 2023-24 to 75.2% in 2024-25. The average price for NFC grapefruit juice sold on

promotion increased from \$9.54 per SSE gallon in 2023-24 to \$10.43 in 2024-25. Recon grapefruit juice sold on promotion had an average price of \$10.22 in 2024-25, compared to \$10.24 in 2023-24. For non-promotional sales, NFC grapefruit juice was priced at \$13.34 per SSE gallon in 2024-25, compared to \$11.94 in the previous season, while Recon prices changed from \$8.82 to \$9.00 per SSE 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 67% of total grapefruit production during the 2024-25 season. Certified fresh grapefruit shipments in 2024-25 are currently estimated at 0.87 million boxes (equivalent to 1.74 million cartons), which would represent a decline of 25.6% compared to last season. Domestic fresh grapefruit shipments are projected at 1.66 million cartons, which would represent a decline of 20.7% compared to last season. The domestic share has increased in recent years from around 42% annually to a 95% share of all Florida fresh grapefruit shipments. Export shipments are projected at 84,475 cartons of fresh grapefruit during the 2024-25 season, representing a decline of 66% compared to last season. Certified Florida fresh exports represent 5% of fresh shipments. Florida fresh grapefruit will be shipped to various export markets in Asia, Europe, and Canada. Accounting for an estimated 10,504 cartons, the top markets for Florida certified fresh grapefruit are Japan and Korea (ROK). Europe is projected to receive approximately 15,120 cartons of fresh Florida grapefruit, and Florida fresh packers are expected to ship approximately 54,139 cartons to Canada, accounting for 3% of total exports and 35% decline compared to the previous season.

Florida Specialty Crop and Utilization

The USDA/NASS September estimate of the Florida specialty crop in 2024-25 is 0.4 million 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 94% since the 2005-06 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 45% of the crop with an estimated 181,677 boxes (equivalent to 363,354 cartons) moving during the 2024-25 season to primarily the domestic market (Table 24). Domestic fresh specialty shipments are projected at 357,427 cartons, down by 247,006 cartons. The domestic share typically represents close to 97% of annual shipments. Florida packers are projected to export approximately 5,913 cartons of fresh specialty fruit during the 2024-25 season, representing a decline of 5,706 cartons over last season. Accounting for 73% of exports, Canada would be the leading destination of Florida fresh specialty.

Preliminary On-Tree Price Expectations

Prices are critical variables for the various projections in this report. For example, they are the primary explanatory variables in projecting volume sales, which in turn, determine inventory levels. Various data on citrus prices are reported. From this, price trends can be identified and used in the analysis. In this section, some price trends at the grower level are discussed. Nothing herein is meant to imply minimum pricing, nor FDOC staff opinion on optimal pricing. The preliminary estimates of on-tree price are used to estimate certified on-tree revenues for the season.

State average certified on-tree revenue for 2024-25 are estimated using the same methodology used by the USDA/NASS Florida Field Office to calculate the final on-tree returns reported in the preliminary 2024-25 Citrus Summary released on August 29, 2025. The on-tree price estimates are based on assumed state average prices and costs and may not reflect the returns for any particular grower to the extent that prices and costs faced by a grower deviate from the averages. The on-tree prices are determined by factoring in the estimated expenses for picking, hauling, and packing charges (if applicable). This calculation utilizes a weighted average based on production at the state level for both fresh and processing markets as reported in the USDA/NASS 2024-25 Florida Citrus Statistics. The variance in average processor delivered-in prices per pounds solids for processed oranges and grapefruit are shown in Table 25.⁴ The estimated delivered-in prices in 2024-25 are weighted averages of priced fruit as of the week of delivery (spot and contract). Industry sources are consulted to assess the proximity of assumptions on contract prices with actual market values. On-tree price projections are calculated using pick and haul costs as reported by the University of Florida's Citrus Research and Education Center (UF-CREC) (Singerman, 2025). Based on assumed average delivered-in prices for early/mid-season and Valencia oranges of \$3.71/ps⁵ and \$3.79/ps, respectively, average processed on-tree prices in 2024-25 for early/mid-season and Valencia oranges are estimated at \$11.45/box and \$13.69/box, respectively (Table 25). Based on assumed average delivered-in prices for white and red grapefruit combined of \$3.79/ps, average processed on-tree prices in 2024-25 for white grapefruit and red grapefruit are estimated at \$13.69/box (Table 25).

⁴ Note that the 2024–25 USDA/NASS preliminary estimate for processed on-tree returns may significantly understate total returns for the prior season before adjustments are made for intermediate-priced fruit. In addition, preliminary on-tree estimates may differ from initial USDA reporting due to variances in estimated packing and harvesting costs. Preliminary certified on-tree prices are derived from CREC cost estimates (see Singerman 2024; 2025). Certified on-tree revenue reflects certified fruit only.

⁵ ps = refers to pounds solids or the amount of soluble solids in each box of fruit.

Certified on-tree revenues for Florida oranges, grapefruit, and specialty citrus varieties are reported in Table 18. Total certified orange on-tree revenue is projected at \$158.9 million for the 2024-25 season compared to the preliminary estimated \$176.5 million for the 2023-24 season, representing a 28% decrease in orange revenues for the season. Total processed orange on-tree revenue is projected at \$141.7 million in 2024-25 compared to the preliminary estimate of \$151.1 million for the 2023-24 season, representing a 6.3% decrease in processed revenues for the season. Fresh orange on-tree revenue is estimated to decrease to \$17.2 million in 2024-25 compared to \$25.4 million in 2023-24, representing a 32.1% decrease.

Total certified grapefruit on-tree revenue is projected at \$38.6 million for the 2024-25 season compared to the preliminary estimated \$58.4 million for the 2023-24 season, representing 34% decrease in grapefruit revenues for the season. Total processed grapefruit on-tree revenue is projected at \$7.7 million in 2024-25 compared to the preliminary estimate of \$13.2 million for the 2023-24 season, representing a 41.9% decrease in processed revenues for the season. Fresh grapefruit on-tree revenue is estimated to decrease to \$30.9 million in 2024-25 compared to \$45.2 million in 2023-24, representing a 31.5% decrease.

Total specialty on-tree revenue is projected at \$15.4 million for the 2024-25 season compared to the preliminary estimated \$17.4 million for the 2023-24 season, representing a 10% increase in specialty revenues for the season.

Overall, on-tree revenues for oranges, grapefruit, and specialty citrus are projected to decline by 15.6% from an estimated \$252.4 million in the 2023-24 season to an estimated \$212.9 million in 2024-25 season.

Summary: Implications for the Florida Grower

The USDA September 2025 preliminary forecast projects the 2024-25 Florida orange crop at 12.2 million boxes, a decline of 32.3% from the previous season's 18.0 million boxes. This drop reflects the continuing impacts of HLB (citrus greening), Hurricane Milton, and historically low tree replant rates. Early and mid-season varieties, including Navels, are forecast at 4.6 million boxes (down 32%), while Valencias are projected at 7.6 million boxes, a 32.6% decline.

Approximately 91% of Florida's oranges are expected to be processed in 2024-25. Utilization into single-strength orange juice (SSOJ, NFC) is forecast at 7.16 million boxes, down 5.4 million boxes from last season, while frozen concentrated orange juice (FCOJ) utilization is projected to increase modestly to 3.85 million boxes. Across Brazil, Mexico, and the U.S., combined orange production is expected to decline by 14.1% to 481.5 million 90-lb boxes, with about two-thirds allocated to processing. In São Paulo, processed production fell by 27% from last season, and NFC exports to USMCA during July 2024–June 2025 were down 4.2% year-over-year due to weaker yields and fruit quality issues. Mexico's processed orange production is projected essentially flat at 56.3 million boxes, though shifts toward processing continue as more fruit is diverted away from fresh markets.

Certified fresh orange shipments are estimated at 0.97 million boxes (1.94 million cartons), a 42.6% decline from 2023-24. Roughly 98% of shipments are expected to remain in the domestic market, with exports falling to just 33,435 cartons, a 76.7% year-over-year reduction.

Florida grapefruit production is preliminarily forecast at 1.30 million boxes, down 27.4% from 2023-24. Certified fresh shipments are projected to reach 0.87 million boxes (1.74 million cartons), accounting for roughly 67% of the crop, with the majority shipped domestically.

Processed utilization is estimated at 0.38 million boxes, a 35.8% decline from last season, nearly all of which will go into NFC grapefruit juice (GJ NFC).

Florida's certified fresh grapefruit shipments are estimated at 0.87 million boxes (1.74 million cartons), about 67% of the 1.30 million box crop. Roughly 95% is projected for the domestic market, with exports near 84,475 cartons (about 5% of shipments). Top export destinations include Japan and Korea (~10,504 cartons), Europe (~15,120), and Canada (~54,139).

The 2024-25 Florida specialty citrus crop is forecast at 400,000 boxes, down 50,000 from last year. Certified fresh shipments are expected to represent 45% of production, totaling 181,677 boxes (363,354 cartons), primarily for the domestic market. Despite relatively higher FOB prices, specialty citrus production has contracted by more than 94% since 2005-06, highlighting the long-term structural pressures on this category.

Taken together, Florida's total citrus production for 2024-25 is projected at 13.85 million boxes, a 31.4% decline from last season. These estimates underscore the ongoing effects of HLB, hurricane damage, and limited replanting on the state's citrus base. While past seasons showed modest gains, the overall trajectory remains downward, reflecting a continuing contraction of industry infrastructure.

For growers, the economic environment presents both risks and imperatives. On the supply side, reduced crops, lower juice yields, and shrinking exports are expected to limit returns. On the demand side, inflation and price volatility continue to shape consumer behavior, creating uncertainty in both fresh fruit and processed juice markets. To navigate these pressures, Florida citrus will need to accelerate replanting, strengthen infrastructure, and sustain investment in consumer-focused marketing to preserve competitiveness and reinforce the crop's economic value to Florida's communities. To mitigate these challenges, Florida's citrus industry must prioritize

tree replanting initiatives, enhance industry infrastructure, and invest in consumer-driven marketing strategies to maintain market competitiveness and reinforce the value of Florida citrus in the State's overall economy.

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TABLES

Table 1. Utilization of world oranges – Selected Countries.

Season	United States			Brazil ^b			Mexico		
	Prod ^a	Util Fresh	Util Proc	Prod ^a	Util Fresh	Util Proc	Prod ^a	Util Fresh	Util Proc
- million 90-lb equivalent boxes -									
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	473.0	121.0	352.0	101.3	68.2	33.1
2021-22	76.1	31.1	45.1	359.7	112.3	247.4	112.6	59.9	52.7
2022-23	56.5	32.7	23.8	415.0	101.0	314.0	118.9	60.5	58.4
2023-24	61.3	29.4	31.9	378.0	113.4	264.6	119.3	62.9	56.4
2024-25 ^f	58.2	33.1	25.1	265.5	112.0	153.5	60.1	31.3	28.8
2024-25 ^u	56.5	33.7	22.8	301.3	63.5	237.8	123.7	67.4	56.3

u = update.

f = Forecast (based on the USDA production forecast for 2024-25 season released on October 11, 2024).

^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 September 2024.

^b As of 2023, Brazil Production, based on the Brazil Citrus Season (July-June), is reported concurrently with the current Florida citrus season (October-September) to reflect total availability in the Florida citrus season.

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

Table 2. Utilization of Florida round oranges.

Season	Certified ^a Fresh	FCOJ ^b	SSOJ ^b	Certified ^a Processed	Non-Certified Fresh	Other ^c	Total
millions 90-lb boxes							
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	2.45	4.19	34.36	38.62	0.15	0.07	41.05
2022-23	1.49	1.35	12.96	14.26	0.12	<0.00	15.82
2023-24 ^p	1.69	3.46	12.57	16.26	0.07	0.23	17.96
2024-25 ^f	1.441	2.022	11.457	#N/A	0.080	0.000	15.00
2024-25 ^u	0.968	3.851	7.162	11.07	0.110	0.059	12.150

u = update.

f = Forecast (based on the USDA production forecast for 2024-25 season released on October 11, 2024).

^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 FDACS certified processed utilization exceeds USDA final processed utilization.

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 -									
2005-06	147.7	7.3	140.4	320.0	36.5	283.5	101.8	88.4	13.7
2006-07	129.0	6.4	122.6	350.0	34.0	316.0	104.1	86.6	17.1
2007-08	170.2	5.9	164.3	360.0	35.0	325.0	105.3	80.8	24.5
2008-09	162.5	6.9	155.6	315.0	39.0	276.0	102.7	78.1	24.5
2009-10	133.7	5.9	127.8	320.0	46.0	274.0	99.2	77.6	21.6
2010-11	140.5	6.0	134.5	285.0	28.0	257.0	99.9	77.3	22.8
2011-12	146.7	6.1	140.6	444.0	40.7	403.3	89.8	69.9	20.3
2012-13	133.6	6.0	127.6	385.4	80.0	314.2	107.8	70.7	37.0
2013-14	104.7	5.5	99.2	290.0	50.0	240.0	111.0	81.1	29.4
2014-15	97.0	5.1	91.8	309.0	60.1	248.9	110.6	72.2	38.0
2015-16	81.7	4.0	77.7	300.7	39.1	261.6	112.8	71.7	40.4
2016-17	68.9	2.8	66.0	245.3	59.7	185.6	113.4	60.6	51.4
2017-18	45.1	2.9	42.2	398.4	28.4	370.0	116.0	68.2	46.5
2018-19	71.9	3.0	68.8	286.0	49.2	236.8	115.5	60.9	53.9
2019-20	67.3	2.9	64.4	386.8	61.7	325.1	62.0	39.1	22.0
2020-21	53.0	3.3	49.7	268.6	46.1	222.5	113.9	59.2	53.9
2021-22	41.2	2.6	38.6	263.0	38.6	224.4	112.6	58.6	52.7
2022-23	15.8	1.6	14.2	314.1	48.8	265.3	118.9	59.8	58.4
2023-24p	18.0	1.8	16.2	307.2	46.1	261.1	119.3	62.1	56.4
2024-25f	15.0	1.5	13.5	215.8	32.4	183.4	60.1	31.3	28.8
2024-25u	12.2	1.1	11.0	230.9	36.1	194.8	123.7	66.6	56.3

u = update. f = Forecast (based on the USDA production forecast for 2024-25 season released on October 11, 2024).

^a Based on USDA, FAS, "Brazil Citrus Semi-annual," GAIN report various issues and Fundecitrus updates. As of 2023, São Paulo production, based on the Brazil Citrus Season (July-June), is reported concurrently with the current Florida citrus season (October-September) to reflect total availability in the Florida citrus season. The harvest estimate includes the region of São Paulo and the West-Southwest Minas Gerais citrus belt.

^b FAS Production, Supply and Demand database; 2023-24 and 2024-25 estimated using various industry sources.

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

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

Season	Florida ^a	São Paulo ^b	Mexico ^c
		SSE gal/box	
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	5.23140	5.68517
2021-22	4.89963	5.32177	5.68517
2022-23	4.71572	5.25063	3.33721
2023-24 ^p	4.72496	5.03954	3.82466
2024-25 ^f	4.72855	4.78756	3.57672
2024-25 ^u	4.79398	4.78756	4.62229

u = update.

f = Forecast (based on the USDA production forecast for 2024-25 season released on October 11, 2024).

^a Source: FDOC Processors Statistics database.

^b Source: CitrusBr

^c Estimated juice yield in Mexico is calculated using USDA/FAS Production, Supply and Distribution (PSD) Datasets. The yield remains unchanged from 2019-20 to present suggesting the reported yield is used to derive production estimates.

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

Season	Florida ^a (October - September)	São Paulo ^b (July - June)	Mexico ^c (October - September)	Total
- million SSE gallons -				
2005-06	916.7	1,726.8	78.7	2,722.3
2006-07	807.1	1,921.8	97.5	2,826.4
2007-08	1,098.3	1,977.5	142.0	3,217.9
2008-09	1,024.7	1,761.7	146.2	2,932.6
2009-10	797.3	1,699.0	122.6	2,618.8
2010-11	854.0	1,538.8	127.3	2,520.1
2011-12	919.7	2,147.9	115.6	3,183.2
2012-13	812.3	1,685.5	210.3	2,708.1
2013-14	614.6	1,201.2	175.4	1,991.2
2014-15	540.5	1,461.0	221.4	2,223.0
2015-16	440.8	1,222.8	230.5	1,894.0
2016-17	384.1	916.1	292.4	1,592.7
2017-18	234.5	1,956.1	264.6	2,455.2
2018-19	394.3	1,242.7	306.4	1,943.3
2019-20	364.3	1,699.6	125.3	2,189.2
2020-21	263.8	1,185.1	306.4	1,755.2
2021-22	188.9	1,161.7	299.4	1,650.0
2022-23	67.5	1,337.0	195.0	1,599.4
2023-24p	75.7	1,350.1	250.7	1,676.5
2024-25f	63.7	924.3	147.8	1,135.9
2024-25u	52.8	981.7	260.4	1,294.9

u = update.

f = Forecast (based on the USDA production forecast for 2024-25 season released on October 11, 2024).

^a Source: Florida Department of Citrus Processor Database.

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

^c Estimated juice yield in Mexico is calculated using USDA/FAS Production, Supply and Distribution (PSD) Datasets.

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

Season	<u>Florida</u> ^a		<u>Brazil</u> ^b		<u>Mexico</u> ^c		<u>Total</u>			
	Beg. Inv.	Prod.	Beg. Inv.	Prod.	Beg. Inv.	Prod.	Beg. Inv.	Prod.	Avail	Avail Change
- million SSE gallons -										
2005-06	602.80	924.46	140.65	1,726.84	2.51	78.68	745.96	2,729.98	3,475.94	-9.67%
2006-07	446.29	815.73	25.07	1,921.81	1.39	97.48	472.75	2,835.02	3,307.77	-4.84%
2007-08	363.06	1,107.55	20.89	1,977.51	1.39	142.05	385.34	3,227.11	3,612.45	9.21%
2008-09	624.16	1,034.74	231.17	1,761.66	2.79	146.22	858.12	2,942.62	3,800.75	5.21%
2009-10	672.93	806.07	239.53	1,698.99	2.79	122.55	915.25	2,627.61	3,542.86	-6.79%
2010-11	548.46	863.71	178.25	1,538.84	2.79	127.28	729.50	2,529.83	3,259.34	-8.00%
2011-12	391.23	928.39	303.12	2,147.86	2.79	115.59	697.14	3,191.83	3,888.97	19.32%
2012-13	433.56	820.90	936.70	1,685.48	-	210.28	1,370.26	2,716.66	4,086.92	5.09%
2013-14	523.57	622.41	1,083.01	1,201.17	2.29	175.36	1,608.87	1,998.93	3,607.80	-11.72%
2014-15	473.95	547.24	755.82	1,460.99	1.27	221.43	1,231.04	2,229.66	3,460.70	-4.08%
2015-16	503.16	443.59	721.69	1,222.77	2.39	230.48	1,227.24	1,896.84	3,124.07	-9.73%
2016-17	409.89	387.41	497.11	916.12	2.37	292.45	909.37	1,595.98	2,505.35	-19.80%
2017-18	368.28	236.73	151.84	1,956.07	1.67	264.60	521.80	2,457.40	2,979.20	18.91%
2018-19	357.31	396.47	484.95	1,242.68	2.79	306.38	845.05	1,945.53	2,790.57	-6.33%
2019-20	517.69	366.60	358.00	1,699.63	27.85	125.34	903.54	2,191.57	3,095.11	10.91%
2020-21	397.78	265.55	666.19	1,185.09	2.79	306.38	1,066.75	1,757.02	2,823.77	-8.77%
2021-22	347.20	189.64	448.14	1,161.74	2.79	299.41	798.12	1,650.79	2,448.91	-13.28%
2022-23	212.95	67.62	202.35	1,336.97	2.79	194.97	418.09	1,599.56	2,017.64	-17.63%
2023-24p	184.10	77.26	119.83	1,350.12	2.79	250.67	306.71	1,678.04	1,984.75	-1.63%
2024-25f	172.25	63.74	165.01	924.33	2.79	147.80	340.05	1,135.87	1,475.92	-22.96%
2024-25u	163.60	52.80	165.01	981.72	2.79	260.42	331.40	1,294.94	1,626.33	-18.06%

u = update.

f = Forecast (based on the USDA production forecast for 2024-25 season released on October 11, 2024).

^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; forecast applied to PSD data using industry source projections.

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 -								
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	134.80	111.39	246.19	840.00	234.84	1,074.85	150.74	67.86	1,539.64
2020-21	155.75	135.73	291.48	712.62	255.72	968.34	144.10	83.66	1,487.58
2021-22	121.47	161.68	283.14	669.91	219.27	889.18	164.33	74.41	1,411.06
2022-23	193.86	250.54	444.40	528.28	188.07	716.35	147.40	55.09	1,363.25
2023-24	174.03	277.92	451.94	535.27	211.24	746.50	165.85	51.36	1,415.66
2024-25est	134.07	214.11	348.18	412.37	162.74	575.11	127.77	39.57	1,090.63
2024-25u	170.51	266.25	436.77	390.20	164.83	555.04	76.03	26.12	1,090.63

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

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

FCOJ	2020-21	2021-22	2022-23	2023-24	2024-25
- million SSE gallons -					
Florida Ports	175,233,402	178,409,897	158,460,789	198,586,782	184,438,921
BRAZIL	57,711,921	32,850,373	69,958,251	79,800,432	120,575,273
MEXICO	91,708,575	118,417,894	64,719,012	99,966,308	52,456,598
COSTA RICA	23,870,353	25,786,273	22,379,546	16,956,870	8,738,516
BELIZE	1,449,858	102,830	2,839	20,060	0
Rest of World	492,694	1,252,527	1,401,142	1,843,112	2,668,533
Rest of US	90,245,308	82,456,868	122,924,853	78,140,289	54,050,355
BRAZIL	70,419,192	62,677,270	96,554,827	58,167,655	29,665,855
MEXICO	16,244,040	13,839,183	15,895,874	12,157,965	12,326,615
COSTA RICA	720,455	1,282,144	609,486	217,145	955,304
BELIZE	200	0	1380	0	0
Rest of World	2,861,420	4,658,271	9,863,286	7,597,524	11,102,582
FCOJ Total	265,478,709	260,866,764	281,385,642	276,727,071	238,489,276
NFC-OJ	2020-21	2021-22	2022-23	2023-24	2024-25
Florida Ports	73,009,914	124,805,596	241,593,915	220,147,007	144,912,279
BRAZIL	56,429,047	108,008,020	224,970,070	207,544,129	134,226,499
MEXICO	16,533,163	16,512,468	16,037,569	12,019,572	9,655,293
Rest of World	47,704	285,108	586,276	583,306	1,030,487
Rest of US	56,250,341	55,971,271	45,442,847	56,658,506	241,448,686
BRAZIL	41,293,369	38,887,017	39,702,614	41,511,752	33,947,736
MEXICO	14,372,111	15,655,190	4,883,788	14,100,867	13,121,648
Rest of World	584,861	1,429,064	856,445	1,045,887	194,379,302
NFC-OJ Total	114,303,283	163,692,613	281,296,529	261,658,760	178,860,015

Source: FDOC-EMRD IMEX Database; U.S. Department of Commerce.

Table 9. Total Florida forecasted OJ availability, movement, and carryover for 2024-25, and actual for 2023-24.

Item ^a	2023-24	2024-25 ^f	2024-25 ^u		
			Low ^b	Mid	High ^c
- millions 11.8° Brix gallons -					
Beginning Inventory ^a	184.1	162.1	163.6	163.6	163.6
Production ^a	77.3	63.7	52.8	52.8	52.8
Imports ^d	417.7	366.0	338.4	376.0	413.6
Other adjustments ^e	48.7	47.1	90.0	90.0	90.0
Availability	727.8	638.9	644.8	682.4	720.0
Total Movement	564.2	501.4	487.4	487.4	487.4
Domestic	540.7	500.2	486.4	486.4	486.4
Export	7.6	1.1	1.0	1.0	1.0
Ending Inventory	163.6	137.6	157.35	195.0	232.55
- weeks supply -					
Carryover	15.5	14.3	16.8	20.8	24.8

u = update.

f = Forecast (based on the USDA production forecast for 2024-25 season released on October 11, 2024).

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

^e Reprocessed tangerine juice; net loss/gain during reprocessing; and adjustments.

Table 10. Florida FCOJ forecasted availability, movement, and carryover for 2024-25, and actual for 2021-22 to 2023-24.

Item	2022-23	2023-24	2024-25f	2024-25u
FCOJ	- million SSE gallons -			
Beginning Inventory	122.19	68.40	64.97	66.86
Pack	5.96	16.25	9.50	17.83
Other Sources	188.78	230.20	214.58	230.68
Imports	179.20	214.12	199.14	209.28
FCTJ	2.64	3.37	3.30	5.16
Evap	2.10	11.10	10.69	16.09
Net loss/gain	4.84	1.61	1.46	0.14
Total FCOJ Availability	316.93	314.85	289.05	315.37
Total FCOJ Movement	248.53	247.96	229.63	215.72
By Form				
Retail	7.01	6.54	6.05	5.72
Institutional	47.31	43.69	40.37	38.18
Bulk	194.21	197.73	183.22	171.82
By Market				
Domestic	245.80	240.91	228.75	214.79
Export	2.73	7.05	0.88	0.93
Ending Inventory	68.40	66.86	59.42	99.65
Carryover	14.31	14.02	13.46	24.02

u = update based on 47-weeks Florida Processor FCOJ Data.

f = Forecast (based on the USDA production forecast for 2024-25 season released on October 11, 2024).

^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 for 2024-25, and actual for 2021-22 through 2023-24.

Item ^a	2022-23	2023-24	2024-25f	2024-25u
<u>SSOJ</u>	----- million SSE gallons -----			
Beginning Inventory	90.76	115.70	97.11	96.73
Pack From Fruit	61.51	59.49	54.23	34.97
Other Sources	287.62	221.85	198.53	235.32
Imports ^b	248.62	203.58	166.85	215.80
Recon ^c	47.09	33.78	46.36	40.54
Net loss/gain	(8.10)	(15.52)	(14.67)	(21.02)
Total SSOJ Availability	439.89	397.04	349.87	367.02
Total SSOJ Movement	324.19	300.30	271.72	271.72
By Form				
Packaged	307.59	279.86	279.73	253.51
Bulk	16.60	20.44	20.08	18.21
NFC By Market				
Domestic	323.34	299.78	299.30	271.65
Export	0.85	0.52	0.52	0.07
Ending Inventory	115.70	96.73	78.15	95.30
Bulk Ending Inventory ^d	110.88	92.71	73.29	92.49
	----- weeks supply -----			
Carryover	18.6	16.8	15.0	18.2
Bulk Carryover ^d	17.8	16.1	14.0	17.7

u = update.

f = Forecast (based on the USDA production forecast for 2024-25 season released on October 11, 2024).

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 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 -							
2005-06 ^a	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	421.8	316.0	393.8	43.1	371.9	716.5	2.2
2021-22	371.9	219.2	440.6	42.2	234.9	754.6	2.3
2022-23	234.9	110.0	567.8	32.4	203.6	676.7	2.02
2023-24	203.6	145.2	553.5	35.9	184.8	681.5	2.02
2024-25 ^f	183.4	115.8	487.5	29.8	154.1	602.8	1.78
2024-25 ^u	184.8	104.8	546.6	30.6	213.5	592.1	1.74

u = update.

f = Forecast (based on the USDA production forecast for 2024-25 season released on October 11, 2024).

^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 2023-24. Projected for September 2023-24 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>						
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)
2021-22	20.95	190.49	61.25	233.64	19.31	(102.76)
2022-23	6.11	188.78	54.33	191.48	2.73	(53.64)
2023-24	17.76	230.20	50.23	192.40	7.05	(1.72)
2024-25 ^f	10.48	214.58	46.41	183.22	0.88	(5.45)
2024-25 ^u	18.80	230.68	43.90	171.82	0.93	32.83
<u>SSOJ</u>						
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)
2021-22	169.14	145.26	333.57	9.25	1.85	(30.26)
2022-23	61.51	287.62	307.59	15.76	0.85	24.94
2023-24	59.49	221.85	279.86	19.92	0.52	(18.96)
2024-25 ^f	54.23	209.22	255.42	16.30	0.23	(8.50)
2024-25 ^u	34.97	251.41	253.51	18.21	0.07	14.59

u = update.

f = Forecast (based on the USDA production forecast for 2024-25 season released on October 11, 2024).

^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 -----					
2016-17	265.4	148.7	18.1	0.3	432.4
2017-18 ^c	254.4	136.9	16.4	12.2	419.8
2018-19	231.0	136.0	14.7	12.6	394.2
2019-20	263.5	150.9	17.9	13.1	445.4
2020-21	260.3	137.5	15.1	14.7	427.6
2021-22	244.5	135.0	14.7	13.3	407.5
2022-23	196.4	135.8	13.3	11.8	357.4
2023-24	197.46	95.70	10.75	8.75	312.67
2024-25f^a	179.04	92.78	9.18	8.15	289.16
2024-25u^a					
High Price	172.5	88.9	8.9	7.7	278.0
Mid-Price	184.8	80.3	9.8	6.8	281.7
Low Price	188.7	98.1	9.7	8.9	305.4
Price^b					
----- \$ per SSE gallon -----					
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
2020-21	8.81	4.86	5.13	7.62	7.37
2021-22	9.48	5.31	5.33	8.21	7.91
2022-23	10.35	6.82	5.99	9.15	8.81
2023-24	10.46	7.96	7.55	9.85	9.57
2024-25f^a	10.95	8.13	7.86	10.23	10.09
2024-25u^a					
High Price	11.70	9.36	8.45	10.88	10.82
Mid-Price	11.62	9.26	8.36	10.77	10.81
Low Price	11.52	9.17	8.28	10.66	10.64

u = update.

f = Forecast (based on the USDA production forecast for 2024-25 season released on October 11, 2024).

^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/Defense Commissary Agency (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	2021-22	2022-23	2023-24	2024-25
Share - Any Promo^a	----- % of total sales -----			
NFC	27.6%	28.9%	29.5%	23.5%
RECON	24.6%	24.5%	22.1%	22.1%
TOTAL	25.4%	26.0%	26.0%	22.2%
Share - No Promo	----- % of total sales -----			
NFC	72.4%	71.1%	70.5%	76.5%
RECON	75.4%	75.5%	77.9%	77.9%
TOTAL	74.6%	74.0%	74.0%	77.8%
Any Promo Price	----- \$ per SSE gallon -----			
NFC	\$8.61	\$9.36	\$9.44	\$10.26
RECON	\$4.65	\$6.50	\$7.42	\$8.37
TOTAL	\$7.26	\$8.25	\$8.87	\$9.69
No Promo Price	----- \$ per SSE gallon -----			
NFC	\$9.81	\$10.75	\$10.88	\$11.91
RECON	\$5.52	\$6.92	\$8.12	\$9.50
TOTAL	\$8.13	\$9.00	\$9.83	\$11.05

^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 -----								
2005-06	0.15	0.54	4.03	3.14	1.04	0.16	9.06	90-lb boxes 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
2021-22	0.02	0.15	1.96	1.47	1.23	0.06	4.89	2.45
2022-23	0.01	0.09	1.14	0.92	0.79	0.03	2.98	1.49
2023-24	0.01	0.13	1.48	0.93	0.70	0.13	3.37	1.69
2024-25f	0.01	0.09	1.17	0.85	0.70	0.06	2.88	1.44
2024-25u	0.01	0.02	0.84	0.59	0.45	0.02	1.94	0.97

u = update.

f = Forecast (based on the USDA production forecast for 2024-25 season released on October 11, 2024).

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 -----						
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	1.76	0.20	1.33	0.07	<0.001	3.33
2022-23	1.04	0.00	0.68	0.03	0.06	1.81
2023-24 _p	1.171	-	0.585	0.030	0.004	1.790
2024-25 _f	0.910	0.000	0.460	0.030	<0.00	1.400
2024-25 _u	0.872	0.002	0.375	0.017	0.034	1.300

u = update.

f = Forecast (based on the USDA production forecast for 2024-25 season released on October 11, 2024).

Table 18. Florida FCGJ and SSGF availability, movement, and carryover for 2024-25, and actual for 2022-23 through 2023-24.

Item	2022-23	2023-24	2024-25f	2024-25u
<u>FCGJ</u>		--- millions SSE gallons ---		
Beginning Inventory	4.21	3.37	2.30	2.30
Pack From Fruit	<0.00	--	--	0.01
Imports and other adjustments ^a	1.08	0.72	0.99	0.54
Total FCGJ Availability	<u>5.28</u>	<u>4.10</u>	<u>2.73</u>	<u>2.90</u>
Movement	<u>1.91</u>	<u>1.88</u>	<u>1.50</u>	<u>0.90</u>
Ending Inventory	3.37	2.30	1.23	1.49
Carryover (weeks supply)	91.9	63.4	42.7	86.2
<u>SSGJ^c</u>		--- Million SSE gallons ---		
Beginning Inventory	8.45	6.20	5.81	5.81
Pack from Fruit ^a	3.28	3.02	2.31	1.75
Imports/Dom Receipts ^b	<u>5.77</u>	<u>6.63</u>	<u>6.84</u>	<u>5.93</u>
Total SSGJ Availability	<u>17.50</u>	<u>15.86</u>	<u>14.97</u>	<u>13.49</u>
Movement – NFC	11.14	9.99	9.19	8.77
Movement– RECON/EVAP ^{d,e}	0.32	0.18	0.20	0.19
Total SSGJ Movement	<u>11.30</u>	<u>10.02</u>	<u>9.20</u>	<u>8.77</u>
Bulk Ending Inventory	6.05	5.66	5.56	4.53
		--- Weeks supply ---		
Bulk Carryover ^f	28.5	30.2	32.5	28.0
<u>TOTAL GJ</u>				
Beginning Inventory	12.66	9.58	8.11	8.11
Production and Imports ^a	<u>9.85</u>	<u>9.57</u>	<u>9.34</u>	<u>7.23</u>
Total GJ Availability	<u>22.50</u>	<u>19.15</u>	<u>17.45</u>	<u>15.34</u>
Movement- Domestic	13.02	11.85	10.66	9.51
Movement- Export	0.03	0.03	0.03	0.03
Total GJ Movement	<u>13.05</u>	<u>11.88</u>	<u>10.69</u>	<u>9.67</u>
Bulk Ending Inventory	9.74	7.98	6.76	5.67
		--- Weeks supply ---		
Carryover	38.8	35.0	32.9	30.5

u = update. f = Forecast (based on the USDA production forecast for 2024-25 season released on October 11, 2024).

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							
2005-06 ^f	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	23.5	22.0	4.0	5.1	15.3	29.2	0.09
2022-23	15.3	14.3	8.6	3.6	10.5	24.0	0.07
2023-24	10.5	15.7	7.6	4.4	10.4	18.9	0.06
2024-25 ^f	10.4	13.8	7.2	4.2	9.5	17.7	0.05
2024-25 ^u	10.4	12.8	6.0	4.2	7.6	17.5	0.05

u = update.

f = Forecast (based on the USDA production forecast for 2024-25 season released on October 11, 2024).

^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.

^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 2 million gallons.

Table 20. Retail grapefruit juice sales.

Season	Refrig. NFC	Refrig. RECON	Shelf Stable	FCGJ/Other	TOTAL
Volume					
-----million SSE gallons -----					
2016-17 ^b	9.20	0.84	3.77	0.13	13.94
2017-18 ^b	9.01	0.47	3.76	0.09	13.34
2018-19 ^{b,c}	8.46	0.10	2.99	0.39	11.95
2019-20 ^{b,c}	8.91	0.15	2.99	0.47	12.52
2020-21 ^b	8.47	0.18	2.97	0.42	12.04
2021-22 ^b	8.21	0.20	2.54	0.46	11.41
2022-23 ^b	7.43	0.18	2.77	0.31	10.70
2023-24^p	6.83	0.18	2.78	0.02	9.81
2024-25^f	6.48	0.16	2.34	0.01	8.99
2024-25^u					
High Price	6.29	0.22	2.73	0.01	9.25
Mid Price	6.26	0.22	2.71	0.01	9.20
Low Price	6.23	0.22	2.70	0.01	9.16
Price					
----- \$ per SSE gallon -----					
2016-17 ^b	7.81	8.36	6.28	4.93	7.39
2017-18 ^b	8.35	6.97	6.22	5.07	7.68
2018-19 ^{b,c}	8.95	16.32	6.79	5.06	8.33
2019-20 ^{b,c}	9.27	18.16	7.41	5.13	8.73
2020-21	9.49	19.12	7.73	5.13	9.03
2021-22	10.01	19.97	8.71	5.33	9.73
2022-23 ^b	10.60	21.95	9.05	5.99	10.32
2023-24^p	11.20	24.29	9.00	13.30	10.82
2024-25^f	11.95	29.29	13.75	9.54	11.34
2024-25^u					
High Price	12.58	23.35	9.22	6.33	11.84
Mid Price	12.52	23.23	9.18	6.29	11.78
Low Price	12.46	23.12	9.13	6.26	11.72

u = update.

f = Forecast (based on the USDA production forecast for 2024-25 season released on October 11, 2024).

^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/Defense Commissary Agency (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	2021-22	2022-23	2023-24	2024-25
Share - Any promo^a	----- % of total sales -----			
NFC	29.1%	31.6%	30.6%	30.7%
RECON	5.2%	9.1%	12.7%	12.1%
TOTAL	23.3%	25.4%	25.1%	24.8%
Share - No Promo	----- % of total sales -----			
NFC	70.9%	68.4%	69.4%	69.3%
RECON	94.8%	90.9%	87.3%	87.9%
TOTAL	76.7%	74.6%	74.9%	75.2%
Any Promo Price	----- \$ per SSE gallon -----			
NFC	\$8.49	\$8.92	\$9.54	\$10.43
RECON	\$10.95	\$10.21	\$10.24	\$10.22
TOTAL	\$8.64	\$9.06	\$9.73	\$10.52
No Promo Price	----- \$ per SSE gallon -----			
NFC	\$10.64	\$11.38	\$11.94	\$13.34
RECON	\$8.59	\$8.93	\$8.82	\$9.00
TOTAL	\$10.06	\$10.74	\$11.19	\$12.20

^a Share 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
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
2021-22	2.60	0.16	0.42	0.32	0.92	3.52	1.76
2022-23	1.71	0.10	0.18	0.07	0.36	2.07	1.04
2023-24p	2.09	0.08	0.11	0.05	0.25	2.34	1.17
2024-25f	1.64	0.07	0.09	0.02	0.18	1.82	0.91
2024-25u	1.66	0.05	0.02	0.01	0.08	1.74	0.87

u = update.

f = Forecast (based on the USDA production forecast for 2024-25 season released on October 11, 2024).

^a Total exports figure includes certain offshore exports shipped to destinations other than Canada, Europe, or the Far East.

^b May not add up due to rounding.

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

Table 23. Utilization of Florida fresh specialty.

Season	Fresh	Non-Certified	Processed	Total
----- millions 90-pound boxes -----				
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	0.48	0.05	0.27	0.75
2022-23	0.32	0.01	0.15	0.48
2023-24 ^p	0.305	0.024	0.121	0.450
2024-25 ^f	0.270	0.030	0.100	0.40
2024-25 ^u	0.182	0.061	0.157	0.400

u = update.

f = Forecast (based on the USDA production forecast for 2024-25 season released on October 11, 2024).

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.

Season	Exports		Domestic				TOTAL ^b	
(Aug-July)	Overseas	Canada	South	Northeast	Central	West		
----- million 45-pound cartons -----								
2006-07	0.01	0.43	2.55	2.14	1.29	0.20	6.61	---millions 90-pound boxes----
2007-08	0.01	0.41	2.82	2.47	1.20	0.16	7.07	3.30
2008-09	0.00	0.33	2.40	2.22	1.16	0.14	6.25	3.53
2009-10	0.05	0.33	2.45	1.97	0.95	0.60	6.35	3.12
2010-11	0.10	0.30	2.47	1.96	0.99	0.55	6.36	3.17
2011-12	0.04	0.24	2.42	1.82	0.89	0.55	5.95	3.18
2012-13	0.05	0.21	2.04	1.48	0.72	0.42	4.93	2.98
2013-14	0.03	0.16	1.70	1.33	0.62	0.37	4.20	2.46
2014-15	0.03	0.13	1.53	1.19	0.48	0.26	3.61	2.10
2015-16	0.01	0.06	0.99	0.81	0.32	0.17	2.37	1.80
2016-17	0.02	0.04	0.72	0.61	0.20	0.13	1.72	1.19
2017-18	0.00	0.01	0.41	0.30	0.09	0.05	0.87	0.86
2018-19	0.01	0.03	0.48	0.31	0.09	0.06	0.98	0.43
2019-20	0.01	0.03	0.58	0.31	0.11	0.11	1.14	0.49
2020-21	0.01	0.02	0.63	0.23	0.08	0.12	1.10	0.57
2021-22	0.01	0.01	0.55	0.17	0.06	0.07	0.88	0.55
2022-23	0.0017	0.004	0.42	0.13	0.04	0.06	0.65	0.44
2023-24p	0.0028	0.01	0.37	0.14	0.06	0.04	0.61	0.32
2024-25f	0.0023	0.004	0.34	0.11	0.04	0.04	0.54	0.31
2024-25u	0.0016	0.004	0.23	0.07	0.03	0.03	0.36	0.27
								0.18

u = update. f = Forecast (based on the USDA production forecast for 2024-25 season released on October 11, 2024).

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 25. Projected average preliminary 2024-25 Florida fresh and processed on-tree prices.

Table 25. Projected average preliminary 2024-25 Florida fresh and processed on-tree prices.						
Item	FOB Price	Packing Costs ^{b,c}	Delivered-In Price ^a	Pick & Haul Costs ^d	On-Tree Price ^a	
----- \$ per carton -----			----- \$ per box -----			
<u>FRESH (100% Pack Out)</u>						
Oranges						
Navel	24.13	8.38	15.76	31.51	5.16	26.35
Early & Mid	18.45	8.07	10.38	20.75	4.50	16.25
Valencia	19.67	8.07	11.60	23.19	5.49	17.70
Grapefruit						
All Grapefruit	23.86	7.88	15.99	31.97	4.04	27.93
Specialty						
All Tangerine	34.54	9.39	25.15	50.30	10.20	40.10
<u>PROCESSED</u>			- \$/ps ^e -			
Oranges ^f						
Early & Mid (4.54 ps/box)		Low:	3.51	15.91	5.38	10.53
		Mid:	3.71	16.83	5.38	11.45
		High:	3.89	17.63	5.38	12.25
Valencia (5.05 ps/box)		Low:	3.58	18.05	5.46	12.59
		Mid:	3.79	19.15	5.46	13.69
		High:	3.98	20.11	5.46	14.65
Grapefruit ^f						
Red/White (3.91 ps/box)		Low:	3.22	12.62	3.95	8.67
		Mid:	3.42	13.37	3.95	9.42
		High:	3.58	14.03	3.95	10.08

^a No implications regarding minimum or optimal prices are intended herein. Prices based on the marketing year average on-tree price received. 2024-25 preliminary prices are based on cash sales only as reported by the USDA, National Agricultural Statistics Service in "2024-25 Citrus Summary," released August 2025.

^b Packing charges for Florida citrus are reported by Singerman (2024).

^c Includes Industry Assessments (See Singerman (2025)).

^d Pick and haul costs are reported by Singerman (2025).

^e Net of FDOC assessment, inspection fees and import duty ps = refers to pounds solids or the amount of soluble solids in each box of fruit.

^f Spot and contract final prices known week of delivery for Florida certified shipments. Round orange prices include hybrids & tangerines processed with round oranges. Yield data source: Florida Processor Statistics database.

Table 26. Preliminary On-tree returns for certified Florida citrus.

Variety	2023-24			2024-25 ^p		
	Fresh	Processing	TOTAL ^b	Fresh	Processing	TOTAL ^b
<u>Oranges</u>						
Early, Mids, & Navels	12.86	48.06	60.92	8.01	47.44	55.45
Valencias	12.54	103.06	115.60	9.23	94.22	103.45
Total Orange	25.40	151.13	176.52	17.24	141.66	158.90
<u>Grapefruit</u>						
Red/White Grapefruit	45.18	13.20	58.39	30.94	7.67	38.61
<u>Specialty</u>						
Total Tangerines	16.70	0.74	17.44	14.96	0.48	15.44
TOTAL CITRUS^a	87.28	165.07	252.35	63.14	149.80	212.94

p = preliminary estimates

Note that the 2024-25 USDA/NASS preliminary estimate for processed on-tree returns may significantly underestimate total on-tree returns for the prior season before adjustments are made for intermediately priced fruit.

^aBased on an analysis of trends. Nothing herein is meant to imply minimum pricing, nor FDOC staff opinion on optimal pricing. Processing data based on delivered-in prices known week of delivery. Fresh fruit data based on industry trends and the USDA/NASS Citrus Summary released in August 2025 marketing year prices.

^bMay not add up due to rounding.

