



Florida Citrus Outlook 2024-25 Season (March Update)

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Florida Citrus Outlook 2024-25 Season: March Update

Introduction

This report provides an update to supply, demand, and price projections of Florida citrus for the 2024-25 season. The March USDA National Agricultural Statistics Service (USDA/NASS) revised 2024-25 Citrus Production Forecast for the Florida citrus crop, by variety, provides the baseline for these updated projections. This report examines the utilization of oranges, grapefruit, and specialty citrus, in accordance with industry trends. Projections include Florida orange juice (OJ) and grapefruit juice (GJ) pack, movement, and ending inventory. World OJ availability is presented, given its strong bearing on Florida's OJ situation. Fresh fruit movement projections are also included. Sensitivity analyses are provided to assess alternative scenarios for availability and movement, where appropriate.

The March citrus forecast for the 2024-25 Florida citrus season is 13.15 million boxes, an estimated 34.9% 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 7.2% with a total of 119.25 million boxes of oranges, grapefruit, lemons, and specialty citrus from California, Florida, Texas, and Arizona. Specifically, the March forecast projects 59.00 million boxes of oranges, 7.40 million boxes of grapefruit, and 25.35 million boxes of specialty tangerines and tangelos. The USDA forecast also anticipates California and Arizona will produce 27.50 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 2023-24 season based on 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 impact 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 are expected to decline by 22.3% with the United States, Brazil, and Mexico expected to produce approximately a combined 433.9 million 90-lb equivalent boxes in the 2024-25 season.

Specifically, the United States is expected to produce 53.8 million 90-lb equivalent boxes, Brazil is expected to produce 320.0 million 90-lb equivalent boxes, and Mexico is expected to produce an estimated 60.1 million 90-lb equivalent boxes in the 2024-25 season. The data suggests that approximately 59.6% of production in these countries will be utilized for processing, which represents a projected 26.7% decline over last season. The remainder of this section examines utilization within each country.

Florida

The USDA/NASS March forecast for the 2024-25 Florida round orange crop is 11.6 million boxes, which would represent a decline of 35.4%, equivalent to 6.4 million boxes compared to last season's crop of 18.0 million boxes. Table 2 reports Florida orange box utilization. The 2024-25 early and mid-season orange crop forecast, including Navel oranges, is 4.6 million boxes, down 2.16 million boxes (or a decline of 32.0%) from last season. The navel orange crop is forecasted at 100,000 boxes, representing 2.2% of the total early and mid-season

orange crop estimate. The Valencia crop is forecasted at 7.0 million boxes, a projected 37.5% decrease over last season's Valencia production of 11.2 million boxes.²

This Outlook assumes approximately 90% of orange production will be 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 7.80 million boxes (or 74.4% of total processed utilization) in the 2024-25 season, a decrease of 4.76 million boxes from last season. The quantity of orange boxes used in 2024-25 to produce FCOJ is estimated at 2.68 million boxes, a decrease of 0.78 million boxes compared to last season's utilization of 3.46 million boxes. Certified fresh orange shipments in 2024-25 are estimated at 1.03 million boxes, down 38.6% from the 1.69 million boxes shipped last season. Florida's processed orange utilization is estimated at 10.49 million boxes, a decrease of 34.6% compared to last season's utilization of 16.03 million boxes.

The total juice yield for Florida processed production is roughly estimated to be 4.557 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 its 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 26% over the previous season, from 307.2 million 90-lb equivalent boxes to 228.5 million 90-lb equivalent boxes, representing a reduction

² One Florida orange box weighs 90-lb.

of 78.7 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 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 have 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

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

period in Mexico, from October through April, overlaps Florida's. While most of the processed utilization goes into FCOJ, with Mexico producing mainly Valencia varieties for processing, NFC production has increased incrementally each season.

Over the last four seasons, production has been inconsistent due to inclement weather and other unknown factors. Mexico experienced extreme weather conditions in 2021, impacting the available crop. Without official estimates, this Outlook considers recent trends in production and review information from industry sources. Final estimates rely on USDA-FAS production, supply, and demand data and are to be considered approximations. Orange processed production in Mexico decreased by roughly 49% over the previous season, from 56.4 million 90-lb equivalent boxes to 28.8 million 90-lb equivalent boxes, representing a reduction of 27.6 million 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 3.577 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 was estimated at 74% and Texas utilization was estimated at 76%, with the remainder going into processed. During the 2021-22 season, California fresh utilization was 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 was 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 March citrus production forecast for the 2024-25 season, California is expected to produce 39.0 million 80-lb boxes of non-Valencia type oranges and 7.5 million 80-lb boxes of Valencia oranges for a total of 46.5 million boxes of oranges, a decrease of 2.1% over the previous season. As many as 12.3 million boxes are estimated to be processed into juice based on previous utilization rates. The USDA/NASS citrus production forecast for Texas orange production in the 2024-25 season is estimated to decrease by 23.7% to 900,000 85-lb boxes. The Texas crop share into processed utilization could represent as many as 291,873 85-lb boxes. This analysis estimates that as many as 11.2 million 90-lb Florida equivalent boxes of California and Texas combined production may be used in processing of orange juice. The share of single-strength and concentrate is not reported by either state. This analysis projects that orange juice production may decrease by approximately 28.5% from an estimated 69.9 million SSE gallons of orange juice in the 2023-24 season to 50.0 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 26.9% over the previous period, from 1.61 billion SSE gallons to 1.17 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. Consequently, an upturn in production might not fully compensate for the decline in existing inventories this season. Both the U.S. and Brazil will rely on their current inventory levels to satisfy present demand, especially considering that combined supplies were down at the onset of the Florida citrus season. 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 1.51 billion SSE gallons, a decrease of 401.3 million SSE gallons (or down 20.9% from last season's 1.92 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 1.42 billion SSE gallons of OJ were exported from Brazil in 2023-24, up 3.8% from the 1.36 billion SSE gallons exported in 2022-23. Most of Brazil's orange juice exports are bound for Europe, with shipments to Europe during the 2023-24 season estimated at 746.5 million SSE gallons (representing approximately 53% of all exports), an estimated 4.2% increase over the previous season. The majority of Brazil's exports to Europe are frozen concentrate, representing 72% of the total in 2023-24p, 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 up by 12.5% with 165.9 million SSE gallons. Brazil's exports to North American (USMCA) countries were up by 1.7% with 451.9 million SSE gallons, primarily intended for the U.S. market. A declining share, approximately 39%, of these exports in the 2023-24 season were frozen concentrate, used to make reconstituted, shelf-stable, and frozen orange juice, signaling a rise in the NFC export market to USMCA.

According to current SECEX export data, Brazil's orange juice shipments for the 2024-25 season are trending to reach approximately 1.06 billion SSE gallons, reflecting a 24.9% decrease from the 1.42 billion SSE gallons exported in 2023-24. Europe remains the largest destination, accounting for an estimated 550.2 million SSE gallons, or roughly 52% of total exports, representing a 26.3% decline compared to the previous season. The composition of Brazil's OJ exports to Europe continues to favor frozen concentrate, which is projected to make up around 70% of the total in 2024-25, though NFC exports are steadily increasing each year. Shipments to East Asia are also experiencing a downturn, with exports trending 40% lower at 99.5 million SSE gallons. Similarly, exports to North American (USMCA) countries, primarily the U.S., are tracking at 388.4 million SSE gallons, down 14.1% from the previous season. Within this market, frozen

concentrate is expected to account for about 47% of exports, continuing a shift toward NFC, which is gaining market share as demand for fresh and premium juice products grows.

As noted earlier, Brazil's 2024-25 orange crop faced multiple blossoming cycles, leading to inconsistent fruit maturity and a lower-than-optimal brix-acid ratio, which has impacted juice quality and processing efficiency. As a result, not-from-concentrate (NFC) orange juice exports have been impacted.

Table 8 provides a summary of U.S. imports of orange juice by origin and type. For FCOJ, imports through Florida Ports increased from 158.27 million gallons in the 2022-23 season to 198.34 million gallons in the 2023-24 season, representing an increase of 40.07 million gallons. Similarly, imports from Brazil increased from 69.96 million gallons to 79.80, showing an increase of 9.84 million gallons. On the other hand, imports from Mexico increased from 64.72 million gallons to 99.97, representing an increase of 35.25 million gallons between the two seasons. In total, FCOJ imports declined from 277.68 million gallons in 2022-23 to 273.52 million gallons in 2023-24, indicating a decrease of 4.16 million gallons. For NFC-OJ, imports through Florida Ports decreased from 224.97 million gallons in the 2022-23 season to 207.54 million gallons in the 2023-24 season, indicating a decline of 17.43 million gallons. Imports from Brazil, which is a significant contributor to NFC-OJ imports, also fell from 16.04 million gallons to 12.02, representing a decrease of 4.02 million gallons. In total, NFC-OJ imports decreased from 281.26 million gallons in 2022-23 to 261.61 million gallons in 2023-24, indicating a reduction of 19.65 million gallons.

Florida Orange Juice Inventory and Movement

Both demand-side and supply-side factors influencing orange juice availability are analyzed in this section. While the 2023-24 orange crop is expected to increase, Florida's orange

juice (OJ) situation continues 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 will outpace 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 opt 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 47.8 million SSE gallons, plus estimated imports and other adjustments totaling 467.6 million SSE gallons, Florida's OJ availability in 2024-25 (October 2023 through September 2024) is estimated at 678.9 million SSE gallons, down 48.8 million SSE gallons (or 6.7%) from last season's level. Total movement in 2024-25 is estimated to decline by 42.3 million SSE gallons (or 7.5%) to 521.9 million SSE gallons from last season. By the end of the 2024-25 season, Florida's OJ ending inventory is estimated to decline to 157.1 million SSE gallons (or 15.6 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 115.0 million SSE gallons (11.5 weeks supply) to 199.2 million SSE gallons (19.8 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 and now assumes approximately 25.6% of Florida processed orange utilization will be processed as FCOJ during the 2024-25 season. Beginning Florida processor inventories of FCOJ for the 2024-25 season totaled 66.9 million SSE gallons, a decrease of 2.2% compared to the previous season. Florida processor FCOJ production is estimated at approximately 11.8 million SSE gallons based on an estimated utilization of 2.68 million boxes of round oranges and an average FCOJ juice yield of 4.38 gallons per box in 2024-25 season. Imports of FCOJ, which is used to make Recon, shelf-stable, and frozen orange juice, are projected to decrease by 11.8% to 188.8 million SSE gallons. Total overall FCOJ availability is projected to decline by 4.0% when compared to the 2023-24 season. Total movement is projected to increase by at least 0.9% as a result of the decline in availability. Based on the estimated utilization, receipts, and movement trends, FCOJ ending inventories are projected to decrease by the end of the season to approximately 52.1 million SSE gallons (or 10.8 weeks of supply).

This analysis assumes that approximately 74.4% of Florida processed orange utilization during the 2024-25 season will be 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 36.0 million SSE gallons based on an estimated utilization of 7.80 million boxes of round oranges and an average juice yield of 4.62 SSE gallons per box, which would be a decrease of 39.5% compared to the pack last season. Imports and domestic receipts of SSOJ are projected to increase by 14.0% to 232.1 million SSE gallons. Total overall SSOJ availability is projected to decline by 5.1% 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 increase by the end of the season to approximately 100.1 million SSE gallons (or 20.1 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.

Preliminary estimates of total U.S. orange juice disappearance are projected at 620.3 million SSE gallons for the 2024-25 season, a projected decline of 12.0% from an estimated 705.0 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 compared to the 2020-21 season. Total U.S. orange juice production is estimated at 97.3 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 projected at 542.4 million SSE gallons, a projected decrease of 6.0% over the previous season. The projected decline in total U.S. imports may reflect surplus inventories held over due to a decline in food service movement. U.S. exports are projected at 30.7 million SSE gallons, a 14.3% 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 6% of FCOJ receipts by processors, respectively. Specifically, Florida processors are expected to receive 36.0 million gallons of SSOJ from Florida production and 274.5 million gallons from other sources. Florida processors are expected to receive 12.7 million gallons of FCOJ from Florida's orange crop with a remaining 223.8 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 will be largely dependent upon juice availability, market growth/ contraction, and substitutes not yet known. In forecasting orange juice sales, it is assumed that consumer behavior during 2024 will continue into the 2024-25 season, despite ongoing concerns over high inflation. The forecasting model also considered the global orange juice shortage, recent resizing of the most popular container size from 52 oz to 46 oz for a significant share of the sales, and potential supply constraints that may not become apparent until later in the season and well into next. The container size change is 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. 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 price projections consider a high price scenario and are adjusted for various marketing conditions, such as consumer demand trends, promotional activities, and competitive pricing, with a sensitivity analysis provided for three price scenarios in Table 14.

Overall retail prices are projected to increase in all three scenarios. Scenario 1 (the high price projection): the OJ retail price is projected to increase from \$9.57 per gallon in 2023-24, to \$10.40 per gallon in 2024-25, a 9% increase in retail price. The price increase over the course of the season is projected to lead to a reduction in retail sales volume, measured in equivalent gallons.

In the 2024-25 period, orange juice sales within Nielsen retail outlets are estimated to reach approximately 278 million equivalent gallons at that price, marking a 11% decline from the previous season's sales of 312.67 million SSE gallons, based on an average price of \$10.40 per equivalent gallon.

In addition to its own price, the demand for OJ depends on levels of OJ advertising and promotion, consumer income, attitudes and perceptions, and competition from other beverages through prices and advertising/promotion levels of these beverages, as well as other factors. Higher promotional activity at retail, on the other hand, would trend towards the low-price scenario. At the other end of the range, Scenario 3 represents the low-end price projection. Under this scenario, price increases at a slower pace from \$9.57 per gallon in 2023-24, to \$9.79 per gallon in 2024-25, a 3% increase in retail price. The low-price scenario is also projected to lead to a reduction in retail sales volume over the course of the season, as measured in equivalent gallons, but at a slower pace. In the 2024-25 period, orange juice sales within Nielsen retail outlets are estimated to reach approximately 305.4 million equivalent gallons, marking a 3% decline from the previous season's sales of 312.67 million SSE gallons, based on an average price of \$9.79 per equivalent gallon.

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. For NFC, the high price scenario projects a 7.7% increase in price, reaching \$11.27 per gallon, with volume falling by 13% to 172.55 million gallons. Mid- and low-price scenarios also show price increases, but with smaller declines in volume. RECON prices are expected to rise to \$8.37 per gallon in the high price scenario (a 5.1% increase), with sales volume declining by 7.6%. Under the mid- and low-price scenarios, volume declines are more moderate. FCOJ is projected to see a

7.3% price increase to \$8.10 per gallon in the high price scenario, with a significant 17.2% drop in volume to 8.9 million gallons. Shelf Stable OJ prices are expected to rise to \$10.53 per gallon (a 6.9% increase), leading to a volume decline of 13.6%. Across all segments, higher prices are associated with lower sales volumes, demonstrating the price sensitivity of each orange juice product type.

The preceding estimates represent a 62% NFC market share of OJ category market sales volume, RECON market share estimated at 32% of total OJ category market sales volume, FCOJ market share estimated at 3% of total OJ category market sales volume, and remaining share of 3% total volume allocated to Shelf Stable.

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.

Reporting of trade promotion activity in the orange juice category increased slightly for NFC orange juice during the 2023-24 season. Yet, the increase in promotional activity still remained well below pre-pandemic levels. Additionally, for much of the season, the average price of orange juice sold on promotion was higher than the previous year's average non-promotional price, especially for Recon orange juice during the 2023-24 season. An analysis of trade promotions revealed that 25.9% of total orange juice sales were on promotion, including 29.4% of NFC orange juice sales and 22.0% of Recon orange juice sales. The average price of orange juice sold on promotion during the 2023-24 season was \$8.884 per equivalent gallon, compared to a non-promotional price of \$9.81 per equivalent gallon.

Florida Fresh Orange Shipments, by Market

Florida fresh certified shipments are reported in Table 16. Certified fresh orange utilization is projected to account for approximately 8.9% of total orange production during the 2024-25 season. Certified fresh orange shipments in 2024-25 are estimated at 1.03 million boxes (equivalent to 2.07 million cartons), which would be a decrease of 38.6% 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 2.05 million cartons, down by 1,183,507 cartons. The domestic share is projected to be about 99% of all Florida fresh orange shipments in 2024-25. Florida packers are projected to export 23,937 cartons of fresh oranges during the 2024-25 season, representing a decline of 82.7% compared to last season. Accounting for 74% of all exports, Canada was the leading destination of Florida fresh oranges.

Florida Grapefruit Crop, Utilization and Movement

The USDA/NASS March estimate of the Florida grapefruit crop in 2024-25 is 1.2 million boxes, a decrease of 33.0% from last season's crop of 1.79 million boxes (Table 17). Florida grapefruit production has suffered losses of nearly 96% since the 2006-07 season due to hurricanes and HLB. Certified fresh grapefruit shipments are estimated to be around 819,000 boxes in 2024-25, which would represent a decline of about 30% compared to certified fresh utilization last season. Non-certified fresh utilization is currently maintained at 30,000 boxes in the 2024-25 season. Processed utilization is projected to account for approximately 29% of the total crop and is estimated at 351,000 boxes, a decline of about 40% 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 99.4% of processed utilization with an estimated 0.35 million boxes used this season, which represents a decrease of about 40.3% compared to last season. Utilization of the processed grapefruit crop into frozen concentrated grapefruit juice (FCGJ) has been on the decline and is estimated to represent less than 2,000 boxes in 2024-25.

Florida Grapefruit Juice Inventory and Movement

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) (Table 18). Combined GJ production plus processor imports, both domestic and foreign, in 2024-25 is estimated at 7.43 million SSE gallons, down 2.14 million SSE gallons from last season. Combining production with beginning inventories, GJ availability in 2024-25 is estimated at 15.5 million SSE gallons, down by 18.9% and representing a decrease of 3.61 million gallons from last year. GJ movement in 2024-25 is

estimated at 9.54 million SSE gallons, down 19.6% from last year. The 2024-25 ending inventory for Florida GJ is estimated at 5.99 million SSE gallons (or 32.6 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 are projected to utilize 99.4% 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 estimated at 1.86 million SSE gallons based on an estimated 0.35 million boxes of grapefruit and a juice yield of 5.326 SSE gallons per box, representing a 38.5% decrease in pack from fruit over the previous season. Florida processors are projected to utilize less than 2,000 boxes of processed grapefruit for FCGJ, representing just 0.06% of processed utilization. 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 8,000 SSE gallons and a juice yield of 3.841 SSE gallons per box. Exports in 2024-25 are 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. presumed consumption of GJ is estimated at 16.55 million SSE gallons in 2024-25, compared to 18.93 million SSE gallons in the previous season (Table 19). The consumption levels are more than twice the expected sales volumes at retail, as reported by Nielsen. This may exclude some cold storage supplies not tracked within the FDOC Florida processor database or by USDA cold storage estimates. Total U.S. GJ production is estimated at 13.05 million SSE gallons, based on Florida processors data and the USDA forecast of the grapefruit crop in California and Texas. Total U.S. GJ imports are estimated at 5.86 million SSE gallons, a decrease of 22% over the previous season. U.S. exports are projected at 4.22 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 3.70 million 80-lb boxes of grapefruit, which would be a decrease of 14.0% compared to the previous season. As many as 1.11 million boxes are estimated to be processed into juice this season based on previous utilization rates. The USDA/NASS citrus production forecast for Texas grapefruit production in the 2024-25 season is estimated to increase by 4.2% to 2.50 million 80-lb boxes. The Texas crop share into

processed utilization could represent as many as 1.13 million 80-lb boxes. This analysis estimates that as many as 2.10 million 85-lb Florida equivalent boxes of California and Texas combined production may be used in processing of grapefruit juice. The share of single-strength and concentrate is not reported by either state. This analysis projects that grapefruit juice production may decrease by approximately 12.0% from an estimated 12.7 million SSE gallons of orange juice in the 2023-24 season to 11.2 million SSE gallons in the 2024-25 season.

In addition to GJ prices, retail sales of GJ during the 2023-24 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 2023-24 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 69% 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).

Overall retail GJ price is projected to increase by 10.5% from \$10.82 per gallon in 2023-24 to \$11.95 per gallon in the 2024-25 season. Scenario 1 (the high price projection): The price increase is projected to lead to a reduction in retail sales volume over the course of the season, as measured in equivalent gallons. At the high price scenario, grapefruit juice sales within Nielsen retail channels are estimated at approximately 9.53 million equivalent gallons, which would be a decline of 2.8% from the previous season's sales of 9.81 million SSE gallons, based on an average price of \$12.19 per equivalent gallon that season. Estimates of sales by segment (FCGJ, NFC, and RECON) are also shown in the table. The demand for GJ depends on the levels of GJ advertising and promotion, consumer income, attitudes and perceptions, and competition from other beverages through prices and advertising/promotion levels of these beverages, as well as other factors. As such, increased distribution or higher promotional activity at retail would trend towards the low-price scenario. Scenario 3 (the low-price projection): Overall retail GJ price is projected to increase by 7.3% to \$11.61 per gallon in 2024-25. At the low-price scenario, volume sales are projected to lead to a growth in retail sales volume over the course of the season, suggesting asymmetric demand, in which consumers respond to price reductions at a slower pace. At the lower price point, grapefruit juice sales within Nielsen retail outlets would be estimated to reach approximately 9.91 million equivalent gallons, marking a growth of 1.0% from the previous season's sales of 9.81 million SSE gallons, based on an average price of \$11.61 per equivalent gallon.

The share of grapefruit juice sold on promotion with corresponding price per equivalent gallon is reported in Table 21. During the 2023-24 season, promotional activity for NFC grapefruit juice accounted for 30.5% of total sales, which is an increase from 31.6% in the 2022-23 season. Recon grapefruit juice saw promotional activity at 12.6% of total sales in 2023-24, compared to 9.1% in the previous season, indicating a slight change. Overall, total promotional sales represented 25.1% of all grapefruit juice sales during 2023-24, compared to 25.4% in 2022-23. For grapefruit juice sold without promotions, NFC sales were at 69.5% of total sales in 2023-24, compared to 68.4% in the previous season. Recon grapefruit juice accounted for 87.4% of non-promotional sales in 2023-24, which is slightly lower compared to 90.9% in 2022-23. Total non-promotional sales decreased from 74.6% in 2022-23 to 74.9% in 2023-24. The average price for NFC grapefruit juice sold on promotion increased from \$8.92 per SSE gallon in 2022-23 to \$9.53 in 2023-24. Recon grapefruit juice sold on promotion had an average price of \$10.28 in 2023-24, compared to \$10.21 in 2022-23. For non-promotional sales, NFC grapefruit juice was priced at \$11.90 per SSE gallon in 2023-24, compared to \$11.38 in the previous season, while Recon prices changed from \$8.93 to \$8.81 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 68% of total grapefruit production during the 2024-25 season. Certified fresh grapefruit shipments in 2024-25 are currently estimated at 0.82 million boxes (equivalent to 1.64 million cartons), which would represent a decline of 30.0% compared to last season. Domestic fresh grapefruit shipments are projected at 1.54 million cartons, which would represent a decline of 26.4% compared to last season. The domestic share has increased in recent years from around 42% annually to a 94% share of all Florida fresh

grapefruit shipments. Export shipments are projected roughly 98,280 million cartons of fresh grapefruit during the 2024-25 season, representing a decline of 61% compared to last season. Certified Florida fresh exports represent 6% of fresh shipments. Florida fresh grapefruit will be shipped to various export markets in Asia, Europe, and Canada. Accounting for an estimated 24,570 cartons, the top markets for Florida certified fresh grapefruit are Japan and Korea (ROK). Europe is projected to receive approximately 39,312 cartons of fresh Florida grapefruit, and Florida fresh packers are expected to ship approximately 34,398 cartons to Canada, accounting for 2% of total exports and 58% decline compared to the previous season.

Florida Specialty Crop and Utilization

The USDA/NASS March estimate of the Florida specialty crop in 2024-25 is 350,000 boxes, a decrease of 100,000 boxes from last season (Table 23). Despite higher FOB prices in recent years, specialty production has declined more than 95% 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 61% of the crop with an estimated 213,500 boxes (equivalent to 427,000 million cartons) moving during the 2024-25 season to primarily the domestic market (Table 24). Domestic fresh specialty shipments are projected at 425,583 million cartons, down by 182,436 cartons. The domestic share, which has typically accounted for close to 97% of annual shipments, is expected to exceed 99% of fresh shipments this season. Florida packers are projected to export approximately 1,400 cartons of fresh specialty fruit during the 2024-25 season,

representing a decline of more than 9,000 cartons over last season. Accounting for 42% of exports, Canada would be the leading destination of Florida fresh specialty.

Summary: Implications for the Florida Grower

The USDA March 2025 forecast update indicates that the 2024-25 Florida orange crop is projected at 11.6 million boxes, marking a 35.4% decline from the previous season's 18.0 million boxes. This decrease follows the continued challenges of HLB (citrus greening), extreme weather events, and declining tree replant rates. The early and mid-season crop, including Navel oranges, is forecast at 4.6 million boxes (down 32%), while Valencia oranges are projected at 7.0 million boxes, a 37.5% drop.

Approximately 90% of Florida's orange production is projected to be processed, mainly for single-strength orange juice (SSOJ) with a higher utilization into frozen concentrated orange juice (FCOJ) this season. Processed orange utilization is forecast at 10.49 million boxes, a 34.6% decrease from the previous season. Total orange production across Brazil, Mexico, and the U.S. is projected to decline by 22.3%, with each region experiencing a downturn due to lower yields and fruit quality issues. Brazil's NFC orange juice exports are down 3.4% year-over-year, while Mexico's processed orange production has declined 49% over the previous season.

The USDA/NASS March estimate for the Florida grapefruit crop in 2024-25 is 1.2 million boxes, marking a 33% decline from the 1.79 million boxes produced in the 2023-24 season. Over the past few seasons, fresh market utilization has increased, with certified fresh grapefruit shipments expected to account for 68% of total production in 2024-25, totaling approximately 819,000 boxes (1.64 million cartons), with the majority shipped domestically. Florida grapefruit will continue reaching global markets, including Europe, Asia, and Canada, though export volumes have declined. Processed utilization is forecast to be 351,000 boxes, making up 29% of

the total crop, a 40% decrease from last season. Nearly all processed grapefruit will be used for NFC grapefruit juice (GJ NFC), while frozen concentrated grapefruit juice (FCGJ) production remains minimal.

Florida's certified fresh orange shipments for the 2024-25 season are projected at 1.03 million boxes (2.07 million cartons), marking a 38.6% decline from last season's 1.69 million boxes. Despite the drop in production, fresh orange shipments remain a crucial segment of Florida's citrus industry, with 99% of shipments expected to be consumed domestically. Export volumes are forecast to decline significantly, with only 23,937 cartons projected for Canada overseas markets, an 82.7% decrease from the previous season.

Florida's certified fresh grapefruit shipments are estimated at 819,000 boxes (1.64 million cartons) for the 2024-25 season, representing a 30% decline from last season. The domestic market continues to be the leading destination in recent years, currently projected to account for 94% of all fresh grapefruit shipments, as exports shrink to below 100,000 cartons, a 61% decrease compared to last season. Key export destinations such as Japan, Korea, and Europe have seen declining volumes, though Canada remains a key buyer. Florida's fresh grapefruit industry faces ongoing challenges due to declining production, higher input costs, and shifting consumer preferences, but remains a key segment for the state's citrus economy.

The 2024-25 Florida specialty citrus crop is forecast at 350,000 boxes, reflecting a 100,000-box decline from last season. Certified fresh shipments are expected to account for 61% of total production, with 213,500 boxes (427,000 cartons) primarily allocated for the domestic market. Despite higher FOB prices, long-term declines in specialty citrus production (down 95% since 2005-06) highlight ongoing industry challenges, including reduced acreage and other impacts from HLB.

While the 2024-25 Florida citrus forecast highlights the continued challenges of production decline, it is essential to view these estimates within the larger industry trend. The October 2024 and March 2025 USDA forecasts reflect the ongoing impacts of Hurricane Milton (October 2024), citrus greening (HLB), and lower tree replanting rates, all of which have contributed to the 34.9% drop in total citrus production. While past seasons showed modest signs of recovery, the long-term trajectory of Florida citrus remains downward, underscoring the need for strategic investment and industry adaptation to ensure long-term sustainability.

Despite tightened supply, demand for fresh and processed citrus products remains uncertain, as inflation and price volatility continue to influence consumer behavior. The 2024-25 season presents key economic risks, including higher input costs, shrinking export markets, and shifts in consumer preferences, all of which may impact grower and processor returns. 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	55.3	31.4	23.8	415.0	101.0	314.0	118.9	60.5	58.4
2023-24 ^p	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	53.8	32.1	21.7	320.0	112.0	208.0	60.1	31.3	28.8

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
2023-24p	1.69	3.46	12.57	16.26	0.07	0.23	17.96
2024-25f	1.441	2.022	11.457	#N/A	0.080	0.000	15.00
2024-25u	1.035	2.681	7.804		0.080	0.000	11.60

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	11.6	1.1	10.5	228.5	34.3	194.2	60.1	31.3	28.8

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	4.55685	4.78756	3.57672

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
2023-24 ^p	75.7	1,316.0	215.9	1,607.6
2024-25 ^f	63.7	924.3	147.8	1,135.9
2024-25 ^u	47.8	978.9	147.8	1,174.5

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	1,316.03	2.79	215.86	306.71	1,609.14	1,915.86	-5.04%
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	172.25	47.78	165.01	978.91	2.79	147.80	340.05	1,174.49	1,514.54	-20.95%

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.

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	182.73	205.66	388.39	385.39	164.76	550.16	99.51	25.68	1,063.74

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

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

FCOJ	2019-20	2020-21	2021-22	2022-23	2023-24
- million SSE gallons -					
Florida Ports	120,237,520	175,014,098	178,114,848	158,270,942	198,338,494
BRAZIL	29,623,767	57,711,921	32,850,373	69,958,251	79,800,432
MEXICO	61,128,559	91,708,575	118,417,894	64,719,012	99,966,308
COSTA RICA	25,638,906	23,870,353	25,786,273	22,379,546	16,956,870
BELIZE	3,578,647	1,449,858	102,830	2,839	20,060
Rest of World	267,641	273,390	957,478	1,211,295	1,594,825
Rest of US	83,466,244	89,606,491	81,798,725	119,408,602	75,184,128
BRAZIL	65,233,048	70,419,192	62,677,270	96,554,827	58,120,881
MEXICO	15,428,259	16,244,040	13,839,183	15,895,874	12,157,965
COSTA RICA	556,074	720,455	1,282,144	609,486	217,145
BELIZE		200		1380	0
Rest of World	2,248,862	2,222,604	4,000,128	6,347,035	4,688,137
FCOJ Total	203,703,764	264,620,589	259,913,573	277,679,544	273,522,622
NFC-OJ	2019-20	2020-21	2021-22	2022-23	2023-24
Florida Ports	38,550,471	73,003,176	124,769,318	241,553,026	220,098,832
BRAZIL	30,400,980	56,429,047	108,008,020	224,970,070	207,544,129
MEXICO	8,123,475	16,533,163	16,512,468	16,037,569	12,019,572
Rest of World	26,016	40,966	248,830	545,387	535,131
Rest of US	49,988,471	56,111,399	55,875,578	45,256,836	56,388,719
BRAZIL	39,575,844	41,293,369	38,887,017	39,702,614	41,511,752
MEXICO	10,330,474	14,372,111	15,655,190	4,883,788	14,100,867
Rest of World	82,153	445,919	1,333,371	670,434	776,100
NFC-OJ Total	88,538,942	129,114,575	180,644,897	281,255,640	261,610,585

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 2022-23 and 2023-24.

Item ^a	2023-24	2024-25f	2024-25u		
			Low ^b	Mid	High ^c
- millions 11.8° Brix gallons -					
Beginning Inventory ^a	184.1	162.1	162.1	162.1	162.1
Production ^a	77.3	63.7	47.8	47.8	47.8
Imports ^d	417.7	366.0	378.8	420.9	463.0
Other adjustments ^e	48.7	47.1	46.6	46.6	46.6
Availability	727.8	638.9	636.9	678.9	721.0
Total Movement	564.2	501.4	521.9	521.9	521.9
Domestic	540.7	500.2	520.7	520.7	520.7
Export	7.6	1.1	1.2	1.2	1.2
Ending Inventory	163.6	137.6	114.97	157.1	199.15
- weeks supply -					
Carryover	15.5	14.3	11.5	15.6	19.8

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	11.76
Other Sources	188.78	230.20	214.58	223.63
Imports	179.20	214.12	199.14	188.84
FCTJ	2.64	3.37	3.30	3.30
Evap	2.10	11.10	10.69	30.52
Net loss/gain	4.84	1.61	1.46	0.97
Total FCOJ Availability	316.93	314.85	289.05	302.24
Total FCOJ Movement	248.53	247.96	229.63	250.16
By Form				
Retail	7.01	6.54	6.05	5.30
Institutional	47.31	43.69	40.37	35.39
Bulk	194.21	197.73	183.22	209.48
By Market				
Domestic	245.80	240.91	228.75	248.28
Export	2.73	7.05	0.88	0.88
Ending Inventory	68.40	66.86	59.42	52.08
Carryover	14.31	14.02	13.46	10.83

u = update based on 51-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	2023-24f	2023-24u
SSOJ				
	----- million SSE gallons -----			
Beginning Inventory	90.76	115.70	97.11	96.73
Pack From Fruit	61.51	59.49	54.23	36.02
Other Sources	287.62	221.85	198.53	243.94
Imports ^b	248.62	203.58	166.85	232.09
Recon ^c	47.09	33.78	46.36	46.36
Net loss/gain	(8.10)	(15.52)	(14.67)	(34.50)
Total SSOJ Availability	439.89	397.04	349.87	376.70

Total SSOJ Movement	324.19	300.30	271.72	271.72
By Form				
Packaged	307.59	279.86	279.73	255.42
Bulk	16.60	20.44	20.08	16.30
NFC By Market				
Domestic	323.34	299.78	299.30	271.44
Export	0.85	0.52	0.52	0.28

Ending Inventory	115.70	96.73	78.15	104.98
Bulk Ending Inventory ^d	110.88	92.71	73.29	100.12

	----- weeks supply -----			
Carryover	18.6	16.8	15.0	20.1
Bulk Carryover ^d	17.8	16.1	14.0	19.2

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. Productio n ^b	United States		Ending Inventory	Disappearance	
			Imports ^c	Exports ^{c,d}		TOTAL	Per Capita
- millions SSE gallons -							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 ^p	203.6	145.2	576.9	35.8	184.8	705.0	2.09
2024-25 ^f	183.4	115.8	487.5	29.8	154.1	602.8	1.78
2024-25 ^u	184.8	97.3	542.4	30.7	173.6	620.3	1.83

^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	12.73	223.80	40.69	209.48	0.88	(14.69)
<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	36.02	274.46	255.42	16.30	0.28	38.48

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	180.3	93.3	9.3	8.2	291.1
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	11.27	8.37	8.10	10.53	10.40
Mid-Price	10.95	8.13	7.86	10.23	10.09
Low Price	10.62	7.89	7.63	9.92	9.79

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	2020-21	2021-22	2022-23	2023-24p
Share - Any Promo^a	----- % of total sales -----			
NFC	27.8%	27.4%	28.9%	29.4%
RECON	21.3%	24.6%	24.5%	22.0%
TOTAL	24.7%	25.3%	26.0%	25.9%
Share - No Promo	----- % of total sales -----			
NFC	72.2%	72.6%	71.1%	70.6%
RECON	78.7%	75.4%	75.5%	78.0%
TOTAL	75.3%	74.7%	74.0%	74.1%
Any Promo Price	----- \$ per SSE gallon -----			
NFC	\$8.11	\$8.61	\$9.36	\$9.43
RECON	\$4.34	\$4.65	\$6.50	\$7.46
TOTAL	\$6.99	\$7.26	\$8.25	\$8.88
No Promo Price	----- \$ per SSE gallon -----			
NFC	\$9.08	\$9.81	\$10.75	\$10.87
RECON	\$5.00	\$5.52	\$6.92	\$8.11
TOTAL	\$7.51	\$8.12	\$9.00	\$9.81

^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 -----								90-lb boxes
2005-06	0.15	0.54	4.03	3.14	1.04	0.16	9.06	4.53
2006-07	0.12	0.56	4.51	3.11	1.26	0.04	9.59	4.80
2007-08	0.28	0.49	3.91	2.91	0.97	0.01	8.58	4.29
2008-09	0.25	0.59	4.69	3.97	1.30	0.02	10.83	5.41
2009-10	0.19	0.55	3.83	3.17	0.95	0.03	8.73	4.36
2010-11	0.14	0.55	3.70	3.22	1.03	0.04	8.69	4.35
2011-12	0.09	0.51	3.93	3.27	1.22	0.06	9.08	4.54
2012-13	0.12	0.57	3.92	3.16	1.21	0.04	9.02	4.51
2013-14	0.12	0.53	3.35	2.81	1.28	0.03	8.13	4.06
2014-15	0.06	0.65	3.09	2.68	1.33	0.03	7.83	3.92
2015-16	0.13	0.50	2.29	1.97	1.10	0.02	6.02	3.01
2016-17	0.03	0.39	1.51	1.61	0.82	0.02	4.38	2.19
2017-18	0.02	0.34	1.64	1.57	1.05	0.05	4.67	2.33
2018-19	0.04	0.27	1.54	1.66	1.08	0.04	4.63	2.32
2019-20	0.02	0.24	2.38	2.00	1.27	0.04	5.96	2.98
2020-21	0.03	0.19	2.66	1.74	1.27	0.21	6.09	3.05
2021-22	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
2023-24p	0.01	0.12	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	0.93	0.64	0.44	0.03	2.07	1.03

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	1.1704	0.0000	0.5846	0.0306	<0.00	1.79
2024-25 _f	0.9100	0.0000	0.4600	0.030	<0.00	1.40
2024-25 _u	0.8190	0.0019	0.3491	0.0300	<0.00	1.20

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 2021-22 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	0.25
Total FCGJ Availability	<u>5.28</u>	<u>4.10</u>	<u>2.73</u>	<u>2.20</u>
Movement	<u>1.91</u>	<u>1.88</u>	<u>1.50</u>	<u>0.59</u>
Ending Inventory	3.37	2.30	1.23	1.61
Carryover (weeks supply)	91.9	63.4	42.7	142.6
<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	1.86
Imports/Dom Receipts ^b	<u>5.77</u>	<u>6.63</u>	<u>6.84</u>	<u>5.68</u>
Total SSGJ Availability	<u>17.50</u>	<u>15.85</u>	<u>14.97</u>	<u>13.37</u>
Movement – NFC	11.14	9.99	9.19	8.96
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>8.96</u>
Bulk Ending Inventory	6.05	5.66	5.56	4.20
		--- Weeks supply ---		
Bulk Carryover ^f	28.5	30.2	32.5	25.5
<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>7.43</u>
Total GJ Availability	<u>22.50</u>	<u>19.15</u>	<u>17.45</u>	<u>15.53</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>9.54</u>
Bulk Ending Inventory	9.74	7.98	6.76	5.99
		--- Weeks supply ---		
Carryover	38.8	35.0	32.9	32.6

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	7.5	4.3	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	13.1	5.9	4.2	8.6	16.6	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	6.51	0.41	2.61	0.00	9.53
Mid Price	6.64	0.42	2.66	0.00	9.72
Low Price	6.77	0.43	2.71	0.00	9.91
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	12.63	23.89	9.25	6.38	12.19
Mid Price	12.38	23.42	9.07	6.25	11.95
Low Price	11.95	22.55	9.02	8.85	11.61

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	2020-21	2021-22	2022-23	2023-24p
Share - Any promo^a	----- % of total sales -----			
NFC	31.5%	29.1%	31.6%	30.5%
RECON	6.0%	5.2%	9.1%	12.6%
TOTAL	24.1%	23.3%	25.4%	25.1%
Share - No Promo	----- % of total sales -----			
NFC	68.5%	70.9%	68.4%	69.5%
RECON	94.0%	94.8%	90.9%	87.4%
TOTAL	75.9%	76.7%	74.6%	74.9%
Any Promo Price	----- \$ per SSE gallon -----			
NFC	\$8.20	\$8.49	\$8.92	\$9.53
RECON	\$9.00	\$10.95	\$10.21	\$10.28
TOTAL	\$8.27	\$8.64	\$9.06	\$9.73
No Promo Price	----- \$ per SSE gallon -----			
NFC	\$10.08	\$10.64	\$11.38	\$11.90
RECON	\$7.84	\$8.59	\$8.93	\$8.81
TOTAL	\$9.32	\$10.06	\$10.74	\$11.16

^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	1.54	0.03	0.04	0.02	0.10	1.64	0.82

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	0.214	0.025	0.112	0.350

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 -----								---millions 90-pound boxes----
2006-07	0.01	0.43	2.55	2.14	1.29	0.20	6.61	3.30
2007-08	0.01	0.41	2.82	2.47	1.20	0.16	7.07	3.53
2008-09	0.00	0.33	2.40	2.22	1.16	0.14	6.25	3.12
2009-10	0.05	0.33	2.45	1.97	0.95	0.60	6.35	3.17
2010-11	0.10	0.30	2.47	1.96	0.99	0.55	6.36	3.18
2011-12	0.04	0.24	2.42	1.82	0.89	0.55	5.95	2.98
2012-13	0.05	0.21	2.04	1.48	0.72	0.42	4.93	2.46
2013-14	0.03	0.16	1.70	1.33	0.62	0.37	4.20	2.10
2014-15	0.03	0.13	1.53	1.19	0.48	0.26	3.61	1.80
2015-16	0.01	0.06	0.99	0.81	0.32	0.17	2.37	1.19
2016-17	0.02	0.04	0.72	0.61	0.20	0.13	1.72	0.86
2017-18	0.00	0.01	0.41	0.30	0.09	0.05	0.87	0.43
2018-19	0.01	0.03	0.48	0.31	0.09	0.06	0.98	0.49
2019-20	0.01	0.03	0.58	0.31	0.11	0.11	1.14	0.57
2020-21	0.01	0.02	0.63	0.23	0.08	0.12	1.10	0.55
2021-22	0.01	0.01	0.55	0.17	0.06	0.07	0.88	0.44
2022-23	0.0017	0.004	0.42	0.13	0.04	0.06	0.65	0.32
2023-24p	0.0022	0.010	0.37	0.14	0.06	0.04	0.61	0.30
2024-25f	0.0023	0.004	0.34	0.11	0.04	0.04	0.54	0.27
2024-25u	0.0008	0.001	0.27	0.09	0.03	0.03	0.43	0.21

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

