



Florida Citrus Outlook 2024-25 Season

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Florida Citrus Outlook

2024-25 Season

Introduction

This report provides supply, demand, and price projections of Florida citrus for the 2024-25 season. On Friday, October 11, 2024, the USDA's National Agricultural Statistics Service (USDA/NASS) released the 2024-25 Citrus Production Forecast for the Florida citrus crop, by variety, which provides the baseline for these projections. This report examines the utilization of oranges, grapefruit, and specialty citrus, in accordance with industry trends. Projections include Florida orange juice (OJ) and grapefruit juice (GJ) pack, movement, and ending inventory, along with estimates of U.S. consumption and retail sales of OJ and GJ estimates. World OJ availability is presented, given its strong bearing on Florida's OJ situation. Fresh fruit movement projections are also included. Sensitivity analyses are provided to assess alternative scenarios for availability and movement, where appropriate.

The October citrus forecast for the 2024-25 Florida citrus season is 16.80 million boxes, an estimated 16.8% 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 3.0% with a total of 123.85 million boxes of oranges, grapefruit, lemons, and specialty citrus from California, Florida, Texas, and Arizona. Specifically, the October forecast projects 63.55 million boxes of oranges, 7.50 million boxes of grapefruit, and 25.40 million boxes of specialty tangerines and tangelos. The USDA forecast also anticipates that California, Florida, and Arizona will produce 27.4 million boxes of lemons in the 2024-25 season (USDA-NASS, 2024a).

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 preliminary production projection 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 preliminary estimate for total U.S. citrus production for the 2023-24 season indicates production will increase 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 25.5 million boxes of lemons in the 2023-24 season (USDA-NASS, 2024a).

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 October 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 2022-23 season.

In addition, the industry continues to experience considerable drop rates, as well as declines in production associated with fewer bearing trees compared to the previous year along with 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).²

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

² The fruit drop rate during the previous 2022-23 season, in which Hurricane Ian was a factor, was considerable higher for all varieties.

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 1.54 million boxes, up 3% from the 1.49 million boxes shipped last season. Florida's processed orange utilization is estimated at 16.31 million boxes, an increase of 14.0% over last season's utilization of 14.31 million boxes.

The total juice yield for Florida processed production is roughly estimated to be 4.591 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 overall due solely 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 4% to 5%. The decline in availability in recent seasons has created uncertainty around the supply needed for processors to meet market demand for both NFC and concentrate orange juice. 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, and 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 has suffered losses of more than 86% since the 2005-06 season due to the harmful impacts of 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 both initial inventories and 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 6.91 million SSE gallons (or 25 weeks supply).³

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

³ At the time of this publication, the Florida Department of Citrus is still gathering data from a small number of facilities and September preliminary estimates will be revised accordingly.

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 are likely to impact the Florida citrus industry's outlook during the 2024-25 season. Table 1 provides estimates of the orange utilization and outlook of the leading suppliers of orange juice on the world market, namely Brazil, Mexico, and the United States. Total combined orange production in the United States, Brazil, and Mexico are expected to decrease by 31.3% with these three countries expected to produce approximately a combined 383.8 million 90-lb equivalent boxes in the 2024-25 season.

Specifically, the United States is expected to produce 58.2 million 90-lb equivalent boxes, Brazil is expected to produce 265.5 million 90-lb equivalent boxes, and Mexico is expected to produce an estimated 60.1 million 90-lb equivalent boxes in the 2023-24 season. The data suggests that approximately 54.1% of production in these countries would be utilized for processing, a projected 41.2% decline over last season. The remainder of this section looks specifically at utilization within each country.

Florida

The USDA/NASS October forecast for the 2024-25 Florida round orange crop is 15.0 million boxes, which would represent a decline of 16.5%, or equivalent to 3.0 million boxes compared to last season's crop of 17.96 million boxes. Table 2 reports Florida orange box utilization. The 2024-25 early and mid-season orange crop forecast, including Navel oranges, is 6.0 million boxes, down 0.76 million boxes (or a decline of 11.2%) from last season. The navel

orange crop is forecasted to be 190,000 boxes, representing 3.2% of the total early and mid-season orange crop estimate. The Valencia crop is forecasted at 9.0 million boxes, a projected 19.6% decrease over last season's Valencia production of 11.2 million boxes.⁴

This Outlook assumes approximately 90% of orange production will be utilized in the processed market. The number of round orange boxes directly utilized for single-strength orange juice (SSOJ), which is used to make not-from-concentrate (NFC) orange juice, is estimated at 11.46 million boxes (or 85.0% of total processed utilization) in the 2024-25 season, a decrease of 1.11 million boxes from last season. The quantity of orange boxes utilized in 2024-25 to produce FCOJ is estimated at 2.02 million boxes, a decrease of 1.44 million boxes over last season's utilization of 3.46 million boxes. Certified fresh orange shipments in 2024-25 are estimated at 1.44 million boxes, down 14.5% from the 1.69 million boxes shipped last season. Florida's processed orange utilization is estimated at 13.48 million boxes, a decrease of 15.9% over last season's utilization of 16.03 million boxes.

The total juice yield for Florida processed production is roughly estimated to be 4.729 SSE gallons per box for the 2024-25 season based on an evaluation of currently available production of 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 vast majority of production reaching markets in Europe, North America, and Asia. The 2024-25 orange crop is facing significant challenges primarily due to extreme heat conditions, increasing disease incidence, and low inventory levels. Heatwaves, worsening citrus greening (HLB), and historically

⁴ One Florida orange box weighs 90-lb.

low rainfall are leading factors behind the projected production drop of 30%, making this the smallest crop since 1988. The greening incidence is expected to increase to at least 46% in 2024, affecting fruit quality and increasing the drop rate. In addition, historically low inventories will hinder availability in the 2024-25 season.

Orange processed production in the State of São Paulo and the West-Southwest Minas Gerais citrus belt, where most of Brazil's oranges used for processing are grown, decreased by roughly 30% over the previous season from 307.2 million 90-lb equivalent boxes to 215.8 million 90-lb equivalent boxes, a reduction of 91.4 million boxes. The current estimates for the São Paulo orange crop, as reported by Fundecitrus, are found in Table 3. The juice yield for São Paulo production is roughly estimated to be 4.788 SSE gallons per box for the 2024-25 season based on an evaluation of currently available production and fruit quality. The juice yield will be updated in future reports as more information becomes available. An overview of historical juice yields is reported in Table 4.

Mexico

Mexico is the second leading exporter of orange juice. The share of its orange production into the processing sector, and its exports overall, 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 consumption in the fresh, domestic market. However, favorable prices and supply shortages in the United States over the last decade continue to displace fresh utilization in favor of the processed export market. Between 80 to 83 percent of Mexican exports are destined for the U.S. market. The packout rate for fresh oranges declined marginally each season, with supplies diverted to processed utilization. The orange fruit processing period in Mexico, from October through April, overlaps Florida's. While most of the processed

utilization goes into FCOJ, with Mexico producing mainly Valencia varieties for processing, NFC production has increased incrementally each season.

Mexico too has been afflicted with extreme temperatures, which have significantly impacted citrus production. Multiple years of prolonged heatwaves and dry conditions have placed considerable stress on the trees leading to fruit drop.

Without official estimates, this Outlook considers recent trends in production and review information from industry sources. Final estimates rely on the USDA Foreign Agricultural Service (FAS) production, supply, and demand data and are to be considered approximations. The estimates for the Mexico orange crop, found in Table 3, are based on the most current data through the 2023-24 season reported by USDA-FAS. Projections for the 2024-25 season in this report are based on industry sources for what to expect in the upcoming season. The projections presented in this report are based on analysis derived from industry sources, which has been applied to the publicly available data provided by USDA-FAS (PSD-Online, 2024).

Processed orange production in Mexico is expected to decrease by as much as 50% over last season, from 56.4 million 90-lb equivalent boxes to 28.8 million 90-lb equivalent boxes, a decrease of 27.6 million boxes. 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 data provided by USDA-FAS. However, it is important to note that the estimated juice yield between the 2016-17 and 2020-21 seasons has not fluctuated, 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, with 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. For the 2023-24 preliminary estimates, California and Texas fresh shares are projected at 68% and 59%, respectively, with the remainder going to processing. The forecast for the 2024-25 season indicates a slight decrease for California to 73% and an increase for Texas to 65%.

According to the USDA/NASS 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 8.7 million 80-lb boxes of Valencia oranges for a total of 47.7 million boxes of oranges, an increase of 0.4% over the previous season. As many as 12.8 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 28% to 850,000 85-lb boxes. The Texas crop share into processed utilization could represent as many as 276,000 85-lb boxes. This analysis estimates that as many as 11.7 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 24.7% from an estimated 69.9 million SSE gallons of orange juice in the 2023-24p season to 52.6 million SSE gallons in the 2024-25 season.

Orange Juice Production and Availability

This section describes orange juice (OJ) availability on the domestic market by evaluating world production, inventories, and movement. Orange juice production and availability are key measures in sustaining the demand for Florida citrus products over the long run. Table 5 provides estimates of comparative juice production from Florida, São Paulo, and Mexico based on their respective production seasons. For the 2024-25 Florida season, estimated total supply of orange juice on the world market is projected to decrease by 29.3% over the previous period from 1.61 billion SSE gallons to 1.14 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 5.6% 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 by an estimated 6% at the onset of the Florida citrus season, equating to roughly 115 million gallons. Mexico also plays a crucial role as a supplier for the U.S. market, but there is limited evidence to determine whether Mexico maintains a consistent inventory from season to season. In recent seasons, both Brazil and Mexico have emerged as significant suppliers of NFC orange juice to the United States, contributing to a displacement of FCOJ amid declining supplies. However, recent increases in FCOJ futures prices have driven demand for FCOJ, while NFC availability remains constrained. As a result, orange juice stocks have fallen below optimal levels in recent years, leading to an overall reduction in availability.

Comparisons of beginning inventories and production levels of orange juice for Florida, São Paulo, and Mexico are provided in Table 6. Aggregate OJ production from the three leading suppliers in 2024-25 is projected at 1.48 billion SSE gallons, a reduction of 440 million SSE gallons (or down 23% from last season's 1.9 billion SSE gallons) due largely to the decline in global production and reduced inventories. World orange juice production must also consider world demand for orange juice stocks as the United States is only one of several markets for the leading suppliers. While the vast majority of U.S. orange juice production is consumed domestically, São Paulo and Mexico orange juice production is primarily intended for the world market. The share among Brazil and Mexico export markets for orange juice are reported in Tables 7 and 8, respectively.

Based on Brazilian Department of Foreign Trade (SECEX) data, an estimated 1.42 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 despite the decline in production and inventories. Most of Brazil's orange juice exports are bound for Europe, with shipments to Europe during the 2023-24 season at an estimated 746.5 million SSE gallons (and 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 2023-24, 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 165.9 million SSE gallons, an increase of 12.5% over the previous period. Brazil's exports to North American (USMCA) countries were up slightly by 1.7% with 451.9 million SSE gallons, intended primarily 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. Table 7 estimates Brazil's 2024-25 SSE gallons of OJ exports based on availability and recent trends.

Based on U.S. Customs import data, an estimated 498 million SSE gallons of OJ were imported into the U.S. during the 2023-24 season through August 2024, down 11% from the 559 million SSE gallons imported during the entire 2022-23 season. While imports of orange juice from Brazil were reportedly down by 19% for the 2023-24 season, FCOJ imports into Florida ports were up by 7 percent. However, it is essential to note that NFC imports are considerably higher than previous years. A majority of Mexico's orange juice exports are bound for the United States, with reported imports at about 137 million gallons through August 2024, an estimated 35% increase over the previous season. A review of U.S. orange juice imports by type of juice and origin are reported in Table 8 of this report.

Florida Orange Juice Inventory and Movement

Both demand-side and supply-side factors affecting orange juice availability are analyzed in this section. Florida's orange juice (OJ) situation continues to be affected by the historical trend in reduced production levels largely associated with the spread of Huanglongbing (HLB, also known as citrus greening), weather-related events, and the decline in global supplies. Concurrently, consumer demand for orange juice will outpace juice receipts from the Florida crop and imports during the previous season, ensuring that existing inventories would be needed. Simultaneously, 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 162.1 million SSE gallons, or 15.3 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 63.7 million SSE gallons, plus estimated imports and other adjustments totaling 413.1 million SSE gallons, Florida's OJ availability in 2024-25 (October 2023 through September 2024) is estimated at 638.9 million SSE gallons, down 88.6 million SSE gallons (or 12.2%) from last season's level. Total movement in 2024-25 is estimated to decline by 64.1 million SSE gallons (or 11.3%) to 501.4 million SSE gallons from last season. By the end of the 2024-25 season, Florida's OJ ending inventory is estimated to decline to 137.6 million SSE gallons (or 14.3 weeks of supply) associated with a decline in availability.

Import quantities will most likely be influenced by actual production, movement, and availability from non-Florida sources observed during the 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 101.0 million SSE gallons (10.5 weeks supply) to 174.2 million SSE gallons (18.1 weeks supply). Estimates of Florida's inventory, production, and movement levels for FCOJ and NFC, underlying the total OJ estimates in Table 9, are shown in Table 10 and Table 11.

This analysis assumes approximately 15% 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 nearly 65 million SSE gallons, representing a 5% decline. Florida

processor FCOJ production is estimated at approximately 9.5 million SSE gallons based on an estimated utilization of 2.02 million boxes of round oranges and an average FCOJ juice yield of 4.70 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 7.0% to 199.1 million SSE gallons. Total overall FCOJ availability is projected to decline by 8.2% when compared to the 2023-24 season. Total movement is projected to decline by at least 8.0% 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 59.4 million SSE gallons (or 13.5 weeks of supply).

This analysis assumes that approximately 85% 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 97.1 million SSE gallons (16.8 weeks supply), a decrease of 16.1% when compared to the previous season. Florida processor SSOJ production is estimated at approximately 54.2 million SSE gallons based on an estimated utilization of 11.46 million boxes of round oranges and an average juice yield of 4.73 SSE gallons per box, which would be a decrease of 8.8% compared to the pack last season. Imports and domestic receipts of SSOJ are projected to decrease by 18.0% to 166.8 million SSE gallons. Total overall SSOJ availability is projected to decline by 11.9% when compared to the 2023-24 season. Total movement, including EVAP into Recon, is projected to decline by at least 9.4% with a majority of SSOJ consumed through retail channels. Based on the estimated utilization, receipts, and movement trends, SSOJ ending inventories are projected to decrease by the end of the season to approximately 73.3 million SSE gallons (or 15.0 weeks of supply).

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

The volume of orange juice disappearance, which is 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 what is referred to as 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 602.8 million SSE gallons for the 2024-25 season, a projected decline of 10.2% from an estimated 671.2 million SSE gallons consumed in the previous season (Table 12). The projected reduction in consumption primarily reflects supply-side constraints and changes in OJ distribution compared to the previous season. Total U.S. orange juice production is estimated at 115.8 million SSE gallons based on the preliminary USDA estimate for the orange crop in Florida, California, and Texas (NASS/USDA, 2024a). Total U.S. orange juice imports are projected at 487.5 million SSE gallons, a projected decrease of 9.5% over the previous season. The projected decline in total U.S. imports may reflect surplus inventories held over due to a decline in foodservice movement. U.S. exports are projected at 29.8 million SSE gallons, a 9.1% 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 21% of SSOJ and 5% of FCOJ receipts by processors, respectively. Specifically, Florida processors are expected to receive 54.2 million gallons of SSOJ from Florida production and 209.2 million gallons from other sources. Florida processors are expected to receive 10.5 million gallons of FCOJ from Florida's orange crop with a remaining 214.6 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 60-65% of orange juice from Florida movement is consumed through retail channels, with the remainder consumed as foodservice and institutional demand.

The Nielsen Topline Report provides more exact measures across retailers, but with abridged market coverage. The Florida Department of Citrus (FDOC) purchases Nielsen retail outlet data for OJ sales in grocery stores with annual sales of at least \$2 million, drug stores with annual sales of at least \$1 million, mass merchandisers, such as Wal-Mart, club (Sam's and BJ's), dollar stores (Dollar General, Family Dollar, and Fred's), and military/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 14.⁵

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 276 million equivalent gallons at that price, marking a 12% 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. On

⁵ Retail market forecasts prepared by Sungeun Yoon, Ph.D. and Moonwon Soh, Ph.D., Assistant Research Scientists, Food and Resource Economics Department, University of Florida

the other end of the range, Scenario 3 represents the low end price projection. Under this scenario price increases at a slower pace from \$9.55 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 171.22 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 17.8% drop in volume to 8.83 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 26.2% of total orange juice sales were on promotion, including 29.9% 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 \$8.84 per equivalent gallon, compared to a non-promotional price of \$9.77 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 9.6% of total orange production during the 2024-25 season. As such, certified fresh orange shipments in 2024-25 are estimated at 1.44 million boxes (equivalent to 2.88 million cartons), a decrease of 14.5% from the 1.69 million boxes (equivalent to 3.37 million cartons) shipped last season. Domestic fresh orange shipments are projected at 2.78 million cartons, down by 455,382 cartons. The domestic share is projected to be about 96% of all Florida fresh orange shipments in 2024-25. Florida packers are projected to export 104,849 cartons of fresh oranges during the 2024-25 season, a decline of -24.1% compared to last season. Accounting for 89% of all exports, Canada was the leading destination of Florida fresh oranges.

Florida Grapefruit Crop, Utilization and Movement

The USDA/NASS October estimate of the Florida grapefruit crop in 2024-25 is 1.40 million boxes, a decrease of 21.8% from last season's crop of 1.79 million boxes (Table 17). Florida grapefruit production has suffered losses of more than 95% since the 2006-07 season due to the harmful impacts of hurricanes and HLB. In recent years, the utilization of Florida grapefruit in the fresh market has seen an uptick, driven by increasingly favorable market prices and deliberate plantings specifically intended for the fresh market. Between the 2004-05 and the 2019-20 seasons, the average portion of Florida's certified fresh grapefruit in relation to the total crop was 40%. However, in the past three years, this share has surpassed 50%. In this analysis, it is

assumed that fresh certified grapefruit will account for 65% of the overall grapefruit utilization, consistent with the previous season. Certified fresh grapefruit shipments are estimated to be 910,000 boxes in 2024-25, which would represent a decline of about 22% compared to certified fresh utilization last season. Non-certified fresh utilization is forecasted at 30,000 boxes in 2024-25. Processed utilization is projected to account for approximately 33% of the total crop and is estimated at 459,000 boxes, a decline of about 21.3% 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 nearly 100% of the processed utilization. Florida processors have not utilized the processed grapefruit crop into frozen concentrated grapefruit juice (FCGJ) since the 2021-22 season.

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 9.34 million SSE gallons, down 0.23 million SSE gallons from last season. Combining production with beginning inventories, GJ availability in 2024-25 is estimated at 17.5 million SSE gallons, down by 8.9% and representing a decrease of 1.70 million gallons from last year. GJ movement in 2024-25 is estimated at 10.69 million SSE gallons, down 10.0% from last year. The 2024-25 ending inventory for Florida GJ is estimated at 6.76 million SSE gallons (or 32.9 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.

The 2022-23 season marked a structural shift in which Florida processors utilized nearly 100% of the processed grapefruit crop for SSGJ (i.e., GJ NFC.) Florida processors are projected to utilize 100.0% 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 2.31 million SSE gallons based on an estimated 0.46 million boxes of grapefruit and a juice yield of 5.001 SSE gallons per box, representing a 23.8% decrease in pack from fruit over the previous season. Florida processors are not expected to utilize processed grapefruit for FCGJ in the 2024-25 season. Beginning inventory of FCGJ for the 2024-25 season is down by 32% over the previous season at 2.30 million SSE gallons (63.39 weeks supply). 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 what is considered to be presumed consumption.

Presumed consumption is a rough measure of market performance reflecting grapefruit juice movement in which the disappearance of grapefruit juice from measurable data is calculated as the sum of: 1) beginning U.S. inventory, 2) Florida and other U.S. production, and 3) U.S.

imports minus 1) U.S. exports and 2) ending U.S. inventory. U.S. ending inventories for GJ consider Florida processor ending inventories and industry sources for the rest of the United States. The measure considers combined grapefruit juice types in which not-from-concentrate grapefruit juice and frozen concentrated grapefruit juice are not disaggregated.

U.S. disappearance of GJ is estimated at 17.69 million SSE gallons in 2024-25, compared to 18.70 million SSE gallons in the previous season (Table 19). Disappearance is expected to decline by 5% between the 2023-24 season and the 2024-25 season. However, this may be overstated, as previous season estimates would have included cold storage supplies not tracked within the FDOC Florida processor database or by USDA cold storage estimates. Total U.S. GJ production is estimated at 13.75 million SSE gallons based on Florida processor data and the USDA forecast of the grapefruit crop in California and Texas. The projected decline in disappearance for the 2024-25 season is consistent with the decline in availability coupled with declining market growth. Total U.S. GJ imports are estimated at 7.21 million SSE gallons, a decrease of 1% 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 4.20 million 80-lb boxes of grapefruit, which would be a decrease of 2.3% compared to the previous season. As many as 1.84 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 decrease by 20.8% to 1.90 million 80-lb boxes. The Texas crop share into

processed utilization could represent as many as 0.89 million 80-lb boxes. This analysis estimates that as many as 2.57 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 increase by approximately 1.2% from an estimated 12.7 million SSE gallons of orange juice in the 2023-24 season to 12.9 million SSE gallons in the 2024-25 season.

In addition to GJ prices, retail sales of GJ during the 2024-25 season may be constrained by declines in distribution, substitutes, and decline in promotion. Estimates are provided for three price scenarios. Nielsen retail sales of GJ are projected to decline in the 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 72% of retail sales volume, Shelf Stable market share estimated at 26% of retail sales volume, FCGJ market share estimated at 2% of retail sales volume, and remaining shares allocated to Recon GJ. Even prior to the pandemic, grapefruit juice sold on promotion has been on the decline. The share of grapefruit juice sold on promotion with corresponding price per equivalent gallon is reported in Table 21.

Grapefruit juice selling on promotion at retail, like orange juice, has been historically low, and this is contributing to an increase in the average reported price. The share of grapefruit juice sold on promotion with corresponding price per equivalent gallon is reported in Table 21. Nielsen collects promotional information from retailers, known as trade promotions, which are compiled into four categories in the FDOC Nielsen custom database. The key promotional items are: 1) feature items, 2) display items, 3) a combination of both feature and display, and 4) temporary price reductions (also known as price decrease). The FDOC Nielsen custom database provides periodic updates on the share of retail sales sold with and without promotions. Feature items are

retailer specific promotions, such as print ads and coupons from retailers. Displays must be set in a secondary selling location and showcase a product in high traffic areas that consumers can pick up and purchase. A display must be temporary for Nielsen to recognize as a display. A promotion that combines elements of features and displays are tracked separately. Finally, a common trade promotion is a temporary price reduction. Price decreases must be at least five percent lower than 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).

Scenario 1 (the high price projection): Overall retail GJ price is projected to increase from \$10.82 per gallon in 2023-24, to \$11.68 per gallon in 2024-25, an 8% 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, grapefruit juice sales within Nielsen retail outlets are estimated at approximately 8.66 million equivalent gallons, which would be a 12% decline from the previous season's sales of 9.81 million SSE gallons, based on an average price of \$11.68 per equivalent gallon that season.

In addition to its own price elasticity, the demand for GJ depends on 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. Increased distribution or higher promotional activity at retail, on the other hand, would trend towards the low-price scenario. Scenario 3 (the low-price projection): Overall retail GJ price is projected to increase \$10.82 per gallon in 2023-24 to \$11.00 per gallon in 2024-25, a 1.7% 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. In the 2024-25 period, grapefruit juice sales within

Nielsen retail outlets are estimated to reach approximately 9.36 million equivalent gallons, marking a 5% decline from the previous season's sales of 9.81 million SSE gallons, based on an average price of \$11.00 per equivalent gallon.

Estimates of sales by segment (FCGJ, NFC, and RECON) are also shown in the table. Retail prices for refrigerated NFC GJ, RECON GJ, Shelf Stable GJ, and FCGJ/ Other are projected to increase across all scenarios for the 2024-25 season, resulting in declines in sales volumes. For refrigerated NFC GJ, the high price scenario projects a 10% increase, from \$11.20 per gallon in 2023-24 to \$12.31 per gallon in 2024-25, with the volume declining by 9%, from 6.83 to 6.22 million gallons. Mid- and low-price scenarios also show price increases, with the lowest volume decline occurring under the low-price scenario, which projects 6.76 million gallons sold at \$11.59 per gallon.

Reconstituted GJ is projected to experience an increase in price, reaching \$30.16 per gallon in the high price scenario, with the volume remaining steady at 0.16 million gallons. This low volume is largely due to the prevalence of smaller-sized Private Label brands, which results in a higher price per equivalent gallon. Shelf Stable GJ follows a similar trend, with a price increase from \$9.00 to \$14.16 per gallon in the high price scenario (a 57.3% rise), leading to a decline from 2.78 to 2.27 million gallons. Overall, higher retail prices are expected to suppress sales volumes across all GJ categories, indicating the products' sensitivity to price changes.

The share of grapefruit juice sold on promotion with corresponding price per equivalent gallon is reported in Table 21. The reporting of promotional activity remained similar to the previous season with an analysis of trade promotions revealing that 25.4% of total grapefruit juice sold during the 2023-24 season was sold on promotion. NFC and shelf stable grapefruit juice sales sold on promotion accounted for 31.1% and 12.4%, respectively, of volume movement. The

average price of grapefruit juice sold on trade promotion during the 2023-24 season was \$9.65 per equivalent gallon compared to a no promo price of \$11.15 per equivalent gallon.

Fresh Grapefruit Shipments, by Market

Florida fresh certified grapefruit shipments are reported in Table 22. Certified fresh grapefruit utilization is projected to account for approximately 65% of total grapefruit production during the 2024-25 season. Certified fresh grapefruit shipments in 2024-25 are currently estimated at 0.91 million boxes (equivalent to 1.82 million cartons), which would represent a decline of 22.2% compared to last season. Domestic fresh grapefruit shipments are projected at 1.64 million cartons, which would represent a decline of 21.7% compared to last season. The domestic share has increased in recent years from around 42% annually to a projected 90% share of all Florida fresh grapefruit shipments. Export shipments are projected at about 180,000 cartons of fresh grapefruit during the 2024-25 season, representing a decline of 27% compared to last season. Certified Florida fresh exports represent 10% of fresh shipments. Florida fresh grapefruit will ship to various export markets in Asia, Europe, and Canada. Accounting for an estimated 17,654 cartons, the top markets for Florida certified fresh grapefruit are Japan and Korea (ROK). Europe is projected to receive approximately 90,636 cartons of fresh Florida grapefruit, and Florida fresh packers are expected to ship approximately 73,710 cartons to Canada, accounting for 4% of total exports and 11% decline compared to the previous season.

Florida Specialty Crop and Utilization

The USDA/NASS October estimate of the Florida specialty crop in 2024-25 is 400,000 boxes, a decrease of 50,000 boxes from last season (Table 23). Despite higher FOB prices in recent years, specialty production has declined more than 94% since the 2005-06 season. The USDA/NASS 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-mid season oranges between the 2005-06 and 2015-16 seasons. Florida certified shipments are estimated to be about 68% of the crop with an estimated 272,000 boxes (equivalent to 544,000 million cartons) moving during the 2024-25 season to primarily the domestic market (Table 24). Domestic fresh specialty shipments are projected at 535,354 million cartons, down by 67,523 cartons. The domestic share typically represents close to 97% of annual shipments. Florida packers are projected to export approximately 6,559 cartons of fresh specialty fruit during the 2024-25 season, representing a decline of 4,151 cartons over last season. Accounting for 66% of exports, Canada would be the leading destination of Florida fresh specialty.

Summary: Implications for the Florida Grower

The October citrus forecast for the 2024-25 Florida citrus season indicates a decline of 16.8% in total Florida citrus production, with a forecast of 16.80 million boxes of oranges, grapefruit, and tangerines. For the entire United States, citrus production is expected to decrease by 3.0%, totaling 123.85 million boxes of oranges, grapefruit, lemons, and specialty citrus from California, Florida, Texas, and Arizona. Specifically, the October forecast projects 63.55 million boxes of oranges, 7.50 million boxes of grapefruit, and 25.40 million boxes of specialty tangerines and tangelos.

The USDA/NASS October forecast for the 2024-25 Florida round orange crop is 15.0 million boxes, which would represent a decline of 16.5%, or equivalent to 3.0 million fewer boxes compared to last season's crop of 17.96 million boxes. This reduction comes amid concerns about reduced availability and increased reliance on imports to meet market demand for orange juice. Total orange juice production is expected to decrease by 29.3% this season, and combined

beginning inventories are projected to be down by 12.2%, leading to potential shortages in meeting demand. Total production by the three main suppliers—Florida, São Paulo, and Mexico—will reach 1.48 billion SSE gallons, down 23% from the previous season. Florida's share is estimated to be 5.6%. Beginning inventories in Florida are also down by 16.1%, and total OJ availability is projected to decline by 11.9%. Retail prices are expected to rise, leading to a decline in sales volumes, with overall retail sales estimated to drop by as much as 12%.

The USDA/NASS October estimate for the Florida grapefruit crop in 2024-25 is 1.40 million boxes, a significant decrease of 21.8% compared to last season's crop of 1.79 million boxes. This decline continues a long-term downward trend in grapefruit production, primarily due to hurricane damage and the spread of HLB (citrus greening). However, the proportion of certified fresh grapefruit has increased, with fresh utilization accounting for approximately 65% of total grapefruit production. Florida fresh grapefruit is still expected to reach international markets, specifically in Asia, Europe, and Canada.

Grapefruit juice production and inventory are both projected to decline in the 2024-25 season. Beginning inventory of GJ in Florida is estimated at 8.11 million SSE gallons, down from 9.58 million gallons last season. Combined availability of GJ is projected to decrease by 8.9%. Texas, California, and Mexico are leading suppliers to Florida processors in addition to Florida's grapefruit crop. Retail sales are expected to be impacted by higher prices and reduced promotion levels, with NFC GJ projected to see a 9% decline in sales volume and Shelf Stable GJ experiencing a substantial price increase leading to a volume decline of 18.3%.

The USDA/NASS October estimate for the Florida specialty crop in 2024-25 is 400,000 boxes, a decrease of 50,000 boxes from last season. Certified shipments are estimated to be around

68% of the crop, with most shipments going to the domestic market. Specialty citrus production has continued to decline despite favorable FOB prices in recent years.

While the projected decline in Florida citrus production is concerning, it should be viewed in the context of broader long-term challenges, such as hurricanes and HLB disease. The Florida citrus industry faces a critical period of adaptation, requiring strategic investments in replanting efforts, infrastructure revitalization, and increased consumer awareness of citrus products to sustain demand.

Despite the decline in production, demand for both fresh and processed citrus remains tenuous as inflation continues to impact consumer purchasing decisions. It is vital for the Florida citrus industry to sustain its efforts in mitigating higher production costs and rebuilding industry infrastructure to ensure long-term sustainability.

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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

p = preliminary.

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

^a U.S. production estimates as reported by USDA-NASS Citrus Fruits Summary (*various issues*) and converted into 90-lb equiv. boxes; Brazil based on various Foreign Agricultural Service GAIN reports and Fundecitrus/CitrusBR. Mexico based on Foreign Agricultural Service, Official USDA Estimates as of September 2024.

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

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

Table 2. Utilization of Florida round oranges.

Season	Certified ^a Fresh	FCOJ ^b	SSOJ ^b	Certified ^a Processed	Non-Certified Fresh	Other ^c	Total
millions 90-lb boxes							
2005-06	4.53	49.11	90.17	140.46	2.78	1.11	147.70
2006-07	4.97	45.96	75.21	121.96	1.43	1.43	129.00
2007-08	4.42	80.80	85.11	163.83	1.43	1.27	170.20
2008-09	5.54	72.58	82.81	155.13	1.38	1.56	162.50
2009-10	4.49	52.74	75.14	127.48	1.37	1.68	133.70
2010-11	4.48	51.75	82.69	134.09	1.48	0.13	140.50
2011-12	4.63	65.35	75.52	140.28	1.46	-0.26	146.70
2012-13	4.59	47.95	79.23	127.18	1.38	0.41	133.60
2013-14	4.15	22.72	76.03	98.88	1.35	0.44	104.70
2014-15	3.99	19.22	71.89	91.72	0.98	0.87	96.95
2015-16	3.07	15.84	61.85	77.60	0.92	0.10	81.70
2016-17	2.19	12.65	53.27	66.09	0.62	0.14	68.85
2017-18	2.33	7.66	34.36	42.26	0.43	0.27	45.05
2018-19	2.32	15.20	53.76	69.11	0.43	0.16	71.85
2019-20	2.98	14.15	49.85	64.18	0.25	0.18	67.30
2020-21	3.05	5.81	43.66	49.65	0.22	0.21	52.95
2021-22	2.45	4.19	34.36	38.62	0.15	0.07	41.05
2022-23	1.49	1.35	12.96	14.26	0.12	<0.00	15.82
2023-24 ^p	1.69	3.46	12.57	16.26	0.07	0.23	17.96
2024-25 ^f	1.441	2.022	11.457	#N/A	0.080	0.000	15.00

p = preliminary.

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
2023-24 ^p	18.0	1.8	16.2	307.2	46.1	261.1	119.3	62.1	56.4
2024-25 ^f	15.0	1.5	13.5	215.8	32.4	183.4	60.1	31.3	28.8

p = preliminary.

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 SSE gal/box	Mexico ^c
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

p = preliminary.

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

p = preliminary.

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%

p = preliminary.

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's 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

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	193,298,647
BRAZIL	29,623,767	57,711,921	32,850,373	69,958,251	75,003,234
MEXICO	61,128,559	91,708,575	118,417,894	64,719,012	99,889,750
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	1,428,734
Rest of US	83,466,244	89,606,491	81,798,725	119,408,602	72,605,768
BRAZIL	65,233,048	70,419,192	62,677,270	96,554,827	56,154,633
MEXICO	15,428,259	16,244,040	13,839,183	15,895,874	11,727,751
COSTA RICA	556,074	720,455	1,282,144	609,486	170,562
BELIZE		200		1380	0
Rest of World	2,248,862	2,222,604	4,000,128	6,347,035	4,552,823
FCOJ Total	203,703,764	264,620,589	259,913,573	277,679,544	265,904,415
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	193,965,995
BRAZIL	30,400,980	56,429,047	108,008,020	224,970,070	181,511,089
MEXICO	8,123,475	16,533,163	16,512,468	16,037,569	11,969,655
Rest of World	26,016	40,966	248,830	545,387	485,251
Rest of US	49,988,471	56,111,399	55,875,578	45,256,836	52,003,629
BRAZIL	39,575,844	41,293,369	38,887,017	39,702,614	37,711,903
MEXICO	10,330,474	14,372,111	15,655,190	4,883,788	13,585,444
Rest of World	82,153	445,919	1,333,371	670,434	706,283
NFC-OJ Total	88,538,942	129,114,575	180,644,897	281,255,640	231,677,898

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	2022-23	2023-24p	2024-25f		
			Low ^b	Mid	High ^c
- millions 11.8° Brix gallons -					
Beginning Inventory ^a	213.0	184.1	162.1	162.1	162.1
Production ^a	67.5	77.3	63.7	63.7	63.7
Imports ^d	427.8	417.6	329.4	366.0	402.6
Other adjustments ^e	65.0	48.6	47.1	47.1	47.1
Availability	773.4	727.5	602.3	638.9	675.5
Total Movement	589.3	565.4	501.4	501.4	501.4
Domestic	569.1	541.9	500.2	500.2	500.2
Export	3.6	7.6	1.1	1.1	1.1
Ending Inventory	184.1	162.1	101.0	137.6	174.2
- weeks supply -					
Carryover	16.7	15.3	10.5	14.3	18.1

p = preliminary.

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	2021-22	2022-23	2023-24p	2024-25f
FCOJ	- million SSE gallons -			
Beginning Inventory	226.17	122.19	68.40	64.97
Pack	19.74	5.96	16.25	9.50
Other Sources	185.13	188.78	230.20	214.58
Imports	185.28	179.20	214.12	199.14
FCTJ	3.70	2.64	3.37	3.30
Evap	4.39	2.10	11.10	10.69
Net loss/gain	(2.88)	4.84	1.61	1.46
Total FCOJ Availability	436.40	316.93	314.85	289.05
Total FCOJ Movement	314.20	248.53	249.68	229.63
By Form				
Retail	7.79	7.01	6.54	6.05
Institutional	53.78	47.31	43.69	40.37
Bulk	252.63	194.21	199.45	183.22
By Market				
Domestic	294.89	245.80	242.63	228.75
Export	19.31	2.73	7.05	0.88
Ending Inventory	122.19	68.40	64.97	59.42
Carryover	20.22	14.31	13.53	13.46

p = preliminary 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	2021-22	2022-23	2023-24p	2023-24f
SSOJ				
	----- million SSE gallons -----			
Beginning Inventory	121.02	90.76	115.70	97.11
Pack From Fruit	169.14	61.51	59.49	54.23
Other Sources	145.26	274.62	221.73	198.53
Imports ^b	122.53	236.67	203.47	166.85
Recon ^c	33.39	45.99	33.78	46.36
Net loss/gain	(10.66)	(8.04)	(15.52)	(14.67)
Total SSOJ Availability	435.43	426.89	396.92	349.87

Total SSOJ Movement	344.67	324.59	299.82	271.72
By Form				
Packaged	333.57	307.59	279.73	255.42
Bulk	11.10	16.60	20.08	16.30
NFC By Market				
Domestic	342.82	323.74	299.30	271.49
Export	1.85	0.85	0.52	0.23

Ending Inventory	90.76	115.70	97.11	78.15
Bulk Ending Inventory ^d	85.41	110.88	93.13	73.29

	----- weeks supply -----			
Carryover	13.7	18.6	16.8	15.0
Bulk Carryover ^d	12.9	17.8	16.2	14.0

p = preliminary.

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

Source: Florida Citrus processors' statistics.

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

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

^c Assumes RECON movement equals pack from FCOJ.

^d Assumes bulk inventories are NFC.

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

Season	Beginning Inventory a	Total U.S. Production 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	2.0
2023-24 ^p	203.6	145.2	538.6	32.8	183.4	671.2	1.99
2024-25 ^f	183.4	115.8	487.5	29.8	154.1	602.8	1.78

p = preliminary.

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>						
2015-16	92.78	197.77	78.72	235.29	41.96	(65.42)
2016-17	75.67	254.37	68.75	224.05	60.00	(22.75)
2017-18	42.16	304.46	64.35	214.88	15.69	51.70
2018-19	87.03	295.82	63.56	225.57	18.98	74.75
2019-20	82.04	164.78	54.17	237.55	15.16	(60.06)
2020-21	31.15	220.71	54.67	199.59	21.99	(24.38)
2021-22	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 ^p	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)
<u>SSOJ</u>						
2015-16	350.81	39.69	384.92	23.77	6.82	(25.01)
2016-17	311.74	59.37	356.01	25.65	5.01	(15.55)
2017-18	194.56	100.04	328.96	24.13	1.97	(60.46)
2018-19	309.44	110.30	318.16	17.30	2.21	82.06
2019-20	284.57	36.01	352.16	23.46	2.60	(57.64)
2020-21	234.40	98.48	343.89	11.45	1.90	(24.36)
2021-22	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 ^p	59.49	221.73	279.73	19.56	0.52	(18.59)
2024-25	54.23	209.22	255.42	16.30	0.23	(8.50)

p = preliminary.

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 -----					
2015-16	283.2	160.5	19.4	0.4	463.4
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^p	197.46	95.70	10.75	8.75	312.67
2024-25^f					
High Price	171.22	88.39	8.83	7.56	276.00
Mid-Price	179.04	92.78	9.18	8.15	289.16
Low Price	187.47	97.54	9.57	8.80	303.37
Price^b					
----- \$ per SSE gallon -----					
2015-16	7.56	4.92	4.91	8.95	6.51
2016-17	7.67	5.15	4.93	8.67	6.69
2017-18 ^c	7.92	4.97	5.07	7.45	6.83
2018-19	8.40	4.88	5.06	7.42	7.03
2019-20	8.62	4.86	5.13	7.31	7.17
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^p	10.46	7.96	7.55	9.85	9.57
2024-25^f					
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

p = preliminary.

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	28.5%	27.6%	28.9%	29.9%
RECON	22.1%	24.6%	24.5%	22.0%
TOTAL	25.0%	25.4%	26.0%	26.2%
Share - No Promo	----- % of total sales -----			
NFC	71.5%	72.4%	71.1%	70.1%
RECON	77.9%	75.4%	75.5%	78.0%
TOTAL	75.0%	74.6%	74.0%	73.8%
Any Promo Price	----- \$ per SSE gallon -----			
NFC	\$8.13	\$8.61	\$9.36	\$9.39
RECON	\$4.33	\$4.65	\$6.50	\$7.44
TOTAL	\$6.99	\$7.26	\$8.25	\$8.84
No Promo Price	----- \$ per SSE gallon -----			
NFC	\$9.09	\$9.81	\$10.75	\$10.84
RECON	\$5.01	\$5.52	\$6.92	\$8.05
TOTAL	\$7.50	\$8.13	\$9.00	\$9.77

^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
2023-24 ^p	0.01	0.12	1.48	0.93	0.70	0.13	3.37	1.69
2024-25 ^f	0.01	0.09	1.17	0.85	0.70	0.06	2.88	1.44

p = preliminary.

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	1.08	0.00	0.78	0.04	<0.00	1.90
2024-25 ^f	0.91	0.00	0.46	0.03	<0.00	1.40

p = preliminary.

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	2021-22	2022-23	2023-24	2024-25 ^f
<u>FCGJ</u>		--- millions SSE gallons ---		
Beginning Inventory	6.58	4.21	3.37	2.30
Pack From Fruit	1.02	<0.00	--	--
Imports and other adjustments ^a	0.84	1.08	0.72	0.99
Total FCGJ Availability	<u>8.43</u>	<u>5.28</u>	<u>4.10</u>	<u>2.73</u>
Movement	<u>4.22</u>	<u>1.91</u>	<u>1.88</u>	<u>1.50</u>
Ending Inventory	4.21	3.37	2.30	1.23
Carryover (weeks supply)	51.8	91.9	63.4	42.7
<u>SSGJ^c</u>		--- Million SSE gallons ---		
Beginning Inventory	10.32	8.45	6.20	5.81
Pack from Fruit ^a	7.25	3.28	3.02	2.31
Imports/Dom Receipts ^b	<u>3.58</u>	<u>5.77</u>	<u>6.63</u>	<u>6.84</u>
Total SSGJ Availability	<u>21.16</u>	<u>17.50</u>	<u>15.85</u>	<u>14.97</u>
Movement – NFC	11.98	11.14	9.99	9.19
Movement– RECON/EVAP ^{d,e}	0.98	0.32	0.18	0.20
Total SSGJ Movement	<u>12.71</u>	<u>11.30</u>	<u>10.02</u>	<u>9.20</u>
Bulk Ending Inventory	8.19	6.05	5.66	5.56
		--- Weeks supply ---		
Bulk Carryover ^f	34.6	28.5	30.2	32.5
<u>TOTAL GJ</u>				
Beginning Inventory	16.90	12.66	9.58	8.11
Production and Imports ^a	<u>13.07</u>	<u>9.85</u>	<u>9.57</u>	<u>9.34</u>
Total GJ Availability	<u>29.97</u>	<u>22.50</u>	<u>19.15</u>	<u>17.45</u>
Movement- Domestic	15.30	13.02	11.85	10.66
Movement- Export	0.91	0.03	0.03	0.03
Total GJ Movement	<u>16.21</u>	<u>13.05</u>	<u>11.88</u>	<u>10.69</u>
Bulk Ending Inventory	13.36	9.74	7.98	6.76
		--- Weeks supply ---		
Carryover	42.9	38.8	35.0	32.9

p = preliminary. 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 ^p	10.5	15.7	7.3	4.3	10.4	18.7	0.06
2024-25 ^f	10.4	13.8	7.2	4.2	9.5	17.7	0.05

p = preliminary.

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 -----					
2015-16	9.29	0.98	3.91	0.20	14.38
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					
High Price	6.22	0.16	2.27	0.01	8.66
Mid Price	6.48	0.16	2.34	0.01	8.99
Low Price	6.76	0.16	2.43	0.01	9.36
Price					
----- \$ per SSE gallon -----					
2015-16	7.86	6.46	6.39	4.92	7.32
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					
High Price	12.31	30.16	14.16	9.83	11.68
Mid Price	11.95	29.29	13.75	9.54	11.34
Low Price	11.59	28.41	13.34	9.25	11.00

p = preliminary.

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	31.4%	29.1%	31.6%	31.1%
RECON	6.2%	5.2%	9.1%	12.4%
TOTAL	24.3%	23.3%	25.4%	25.4%
Share - No Promo	----- % of total sales -----			
NFC	68.6%	70.9%	68.4%	68.9%
RECON	94.0%	94.8%	90.9%	87.6%
TOTAL	75.7%	76.7%	74.6%	74.6%
Any Promo Price	----- \$ per SSE gallon -----			
NFC	\$8.21	\$8.49	\$8.92	\$9.43
RECON	\$9.09	\$10.95	\$10.21	\$10.23
TOTAL	\$8.27	\$8.64	\$9.06	\$9.65
No Promo Price	----- \$ per SSE gallon -----			
NFC	\$10.07	\$10.64	\$11.38	\$11.83
RECON	\$7.66	\$8.59	\$8.93	\$8.83
TOTAL	\$9.27	\$10.06	\$10.74	\$11.15

^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

p = preliminary.

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	0.30	0.02	0.12	0.45
2024-25 ^f	0.27	0.03	0.10	0.40

p = preliminary.

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-- --
2005-06	0.09	0.39	2.75	2.35	1.17	0.88	7.63	3.81
2006-07	0.01	0.43	2.55	2.14	1.29	0.20	6.61	3.30
2007-08	0.01	0.41	2.82	2.47	1.20	0.16	7.07	3.53
2008-09	0.00	0.33	2.40	2.22	1.16	0.14	6.25	3.12
2009-10	0.05	0.33	2.45	1.97	0.95	0.60	6.35	3.17
2010-11	0.10	0.30	2.47	1.96	0.99	0.55	6.36	3.18
2011-12	0.04	0.24	2.42	1.82	0.89	0.55	5.95	2.98
2012-13	0.05	0.21	2.04	1.48	0.72	0.42	4.93	2.46
2013-14	0.03	0.16	1.70	1.33	0.62	0.37	4.20	2.10
2014-15	0.03	0.13	1.53	1.19	0.48	0.26	3.61	1.80
2015-16	0.01	0.06	0.99	0.81	0.32	0.17	2.37	1.19
2016-17	0.02	0.04	0.72	0.61	0.20	0.13	1.72	0.86
2017-18	0.00	0.01	0.41	0.30	0.09	0.05	0.87	0.43
2018-19	0.01	0.03	0.48	0.31	0.09	0.06	0.98	0.49
2019-20	0.01	0.03	0.58	0.31	0.11	0.11	1.14	0.57
2020-21	0.01	0.02	0.63	0.23	0.08	0.12	1.10	0.55
2021-22	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	0.01	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

p = preliminary.

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.

