Retail Sales Trends

Report # 3 of the 2025-26 Season
Period Ending 12/27/2025

Florida Department of Citrus
Economic and Market Research Department

2025-26

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This EMRD report provides the retail sales trends of orange juice, orange juice blends, and grapefruit juice for the period ending 12/27/2025.

Source of data: Nielsen IQ Discover. xAOC = Expanded All Outlets Combined. xAOC data consists of POS data for U.S. grocery stores doing $2 million and greater annual sales, drug stores doing $1 million and greater annual sales, mass merchandisers (e.g., Target, Walmart), club (e.g., Sam's and BJ's), dollar stores (e.g., Dollar General, Family Dollar and Fred's), and military/DECA.

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Quick Topline

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Total xAOC – 4 Weeks ending 12/27/25

TOTAL US - XAOC
4 WEEKS ENDING
12/27/25

	Gallons			Dollars			Price per EQ Gallon		
	4 Weeks YA	4 Weeks	% Chg	4 Weeks YA	4 Weeks	% Chg	4 Weeks YA	4 Weeks	% Chg
TL OJ	27,923,158	25,021,767	-10.39%	$280,409,373	$286,635,947	2.22%	$10.04	$11.46	14.07%
TL OJ REF NFC	19,010,493	17,459,903	-8.16%	$200,499,243	$213,937,887	6.70%	$10.55	$12.25	16.18%
NFC <11oz	273,683	267,048	-2.42%	$5,207,318	$5,354,484	2.83%	$19.03	$20.05	5.38%
NFC 11-20oz	326,941	338,846	3.64%	$7,950,427	$8,674,461	9.11%	$24.32	$25.60	5.27%
NFC 20-40oz	167,821	121,387	-27.67%	$3,512,538	$3,146,404	-10.42%	$20.93	$25.92	23.84%
NFC 40-70oz	13,432,082	11,660,586	-13.19%	$134,419,296	$136,948,686	1.88%	$10.01	$11.74	17.36%
NFC 70-110oz	4,015,933	4,456,285	10.97%	$42,410,792	$53,544,268	26.25%	$10.56	$12.02	13.78%
NFC >110oz	794,033	615,751	-22.45%	$6,998,872	$6,269,585	-10.42%	$8.81	$10.18	15.52%
TL OJ REF RECON	7,341,374	6,350,184	-13.50%	$65,650,705	$60,728,207	-7.50%	$8.94	$9.56	6.94%
TL GJ	775,178	703,963	-9.19%	$8,841,240	$8,791,867	-0.56%	$11.41	$12.49	9.50%

Total xAOC - SYTD

TOTAL US - XAOC
Season Year to Date

	Gallons			Dollars			Price per EQ Gallon		
	SYTD 2024-25	SYTD 2025-26	% Chg	SYTD 2024-25	SYTD 2025-26	% Chg	SYTD 2024-25	SYTD 2025-26	% Chg
TL OJ	75,146,745	66,730,495	-11.20%	$749,025,974	$768,959,622	2.66%	$9.97	$11.52	15.61%
TL OJ REF NFC	49,737,958	45,549,103	-8.42%	$525,632,587	$566,534,267	7.78%	$10.57	$12.44	17.69%
NFC <11oz	814,894	781,197	-4.14%	$15,275,525	$15,614,604	2.22%	$18.75	$19.99	6.63%
NFC 11-20oz	974,032	970,897	-0.32%	$23,142,704	$24,906,644	7.62%	$23.76	$25.65	7.97%
NFC 20-40oz	499,430	385,426	-22.83%	$10,104,801	$9,656,986	-4.43%	$20.23	$25.06	23.84%
NFC 40-70oz	35,073,080	30,077,185	-14.24%	$353,740,988	$359,263,573	1.56%	$10.09	$11.94	18.43%
NFC 70-110oz	10,083,977	11,631,150	15.34%	$103,861,453	$139,857,700	34.66%	$10.30	$12.02	16.75%
NFC >110oz	2,292,545	1,703,246	-25.71%	$19,507,115	$17,234,760	-11.65%	$8.51	$10.12	18.92%
TL OJ REF RECON	21,090,733	17,828,800	-15.47%	$184,268,640	$169,488,950	-8.02%	$8.74	$9.51	8.81%
TL GJ	2,216,067	1,965,710	-11.30%	$24,738,157	$23,902,855	-3.38%	$11.16	$12.16	8.93%

Orange Juice Prices

- The scanner data as reported in the Nielsen Topline Report for period ending 12/27/2025 is preliminary. The Nielsen Topline report provides year-over-year (YOY) and season-to-date (STD) data.

- Average YOY Total OJ price increased by 14.1% to $11.46 per equivalent gallon.
  - Average YOY NFC price increased by 16.2% to $12.25 per equivalent gallon.
  - Average YOY Recon price increased by 6.9% to $9.56 per equivalent gallon.

- Average STD Total OJ price increased by 15.6% from $ 9.97 to $11.52 per equivalent gallon.
  - Average STD NFC price increased by 17.7 % from $ 10.57 to $ 12.44 per equivalent gallon.
  - Average STD Recon price increased by 8.8 % from $ 8.74 to $9.51 per equivalent gallon.

Orange Juice Volume

- The scanner data as reported in the Nielsen Topline Report for period ending 12/27/2025 is preliminary. The Nielsen Topline report provides year-over-year (YOY) and season-to-date (STD) data.

- Average YOY Total OJ sales decreased by 10.4% to 25.02 million equivalent gallons.
  - Average YOY NFC sales decreased by 8.2% (or by 1.55 million equivalent gallons).
  - Average YOY Recon sales decreased by 13.5% (or by 0.99 million equivalent gallons).

- Average Total OJ sales for the season since October 2025 are down by 11.2% with 66.73 million equivalent gallons.
  - Average STD NFC sales decreased by 8.4% with 45.55 million equivalent gallons sold since October 2025.
  - Average STD Recon sales decreased by 15.5% with 17.83 million equivalent gallons sold since October 2025.

Container Size Categories

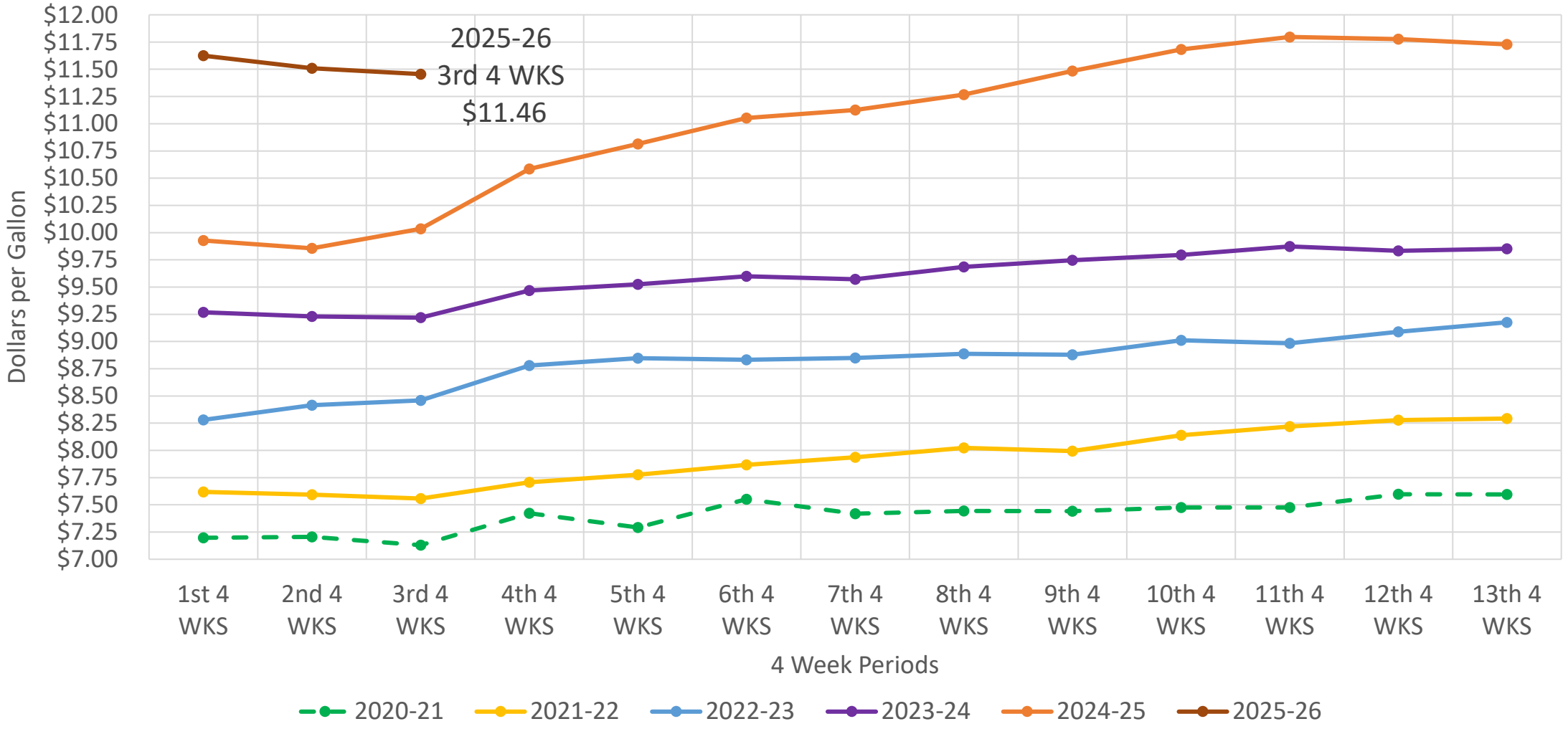
Size Ranges	Container sizes included (ounces)
<11 oz	6, 6.75, 8, 8.45, 10, 10.1, 10.5
11-20 oz	11, 11.5, 12, 12.07, 13.5, 14, 15.2, 16, 17.5
20-40 oz	20, 25.3, 25.4, 28, 32, 33.8
40-70 oz	46, 48, 52, 59, 59.15, 59.17, 63.882, 64
70-110 oz	76, 89, 92, 96
>110 oz	118, 128

Orange Juice Summary

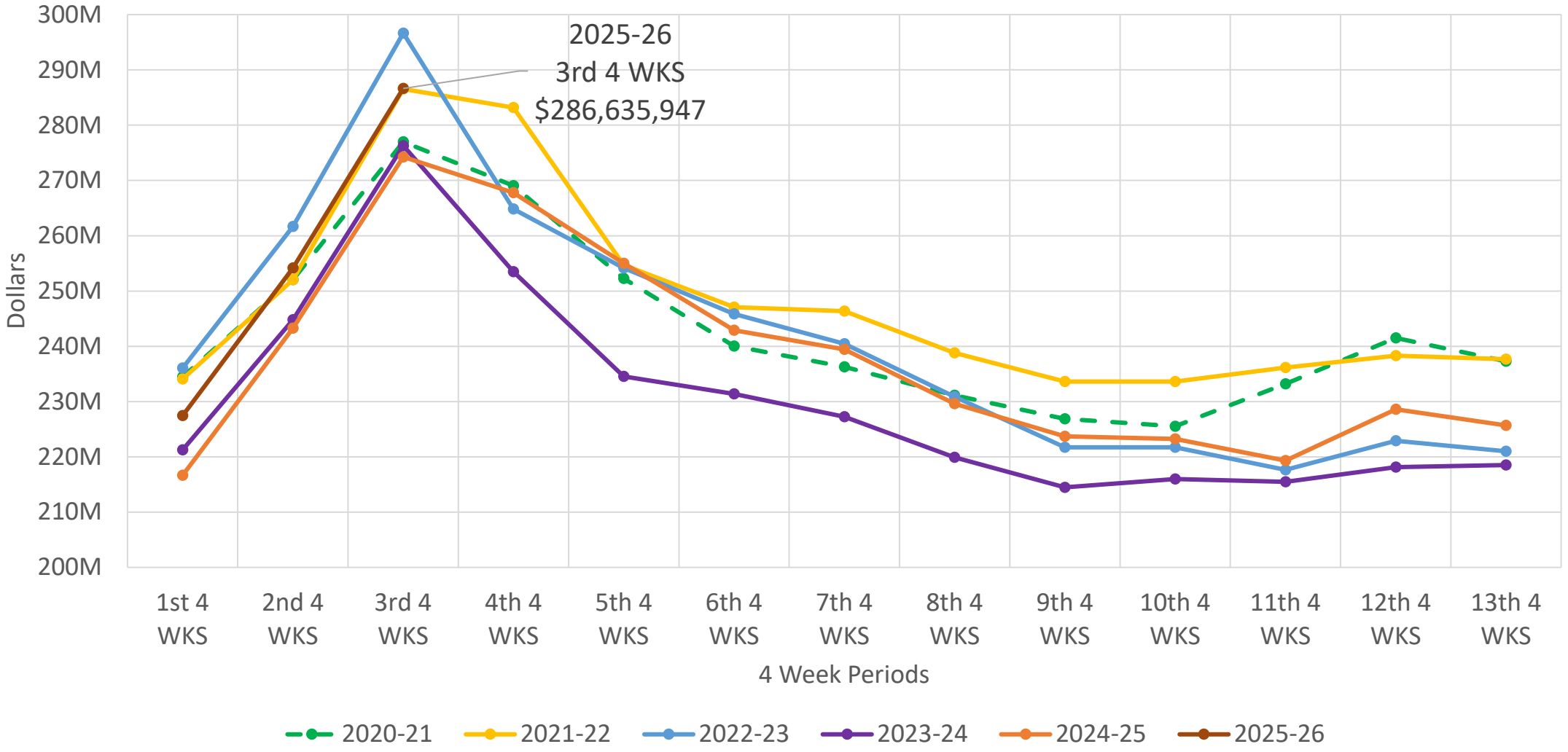
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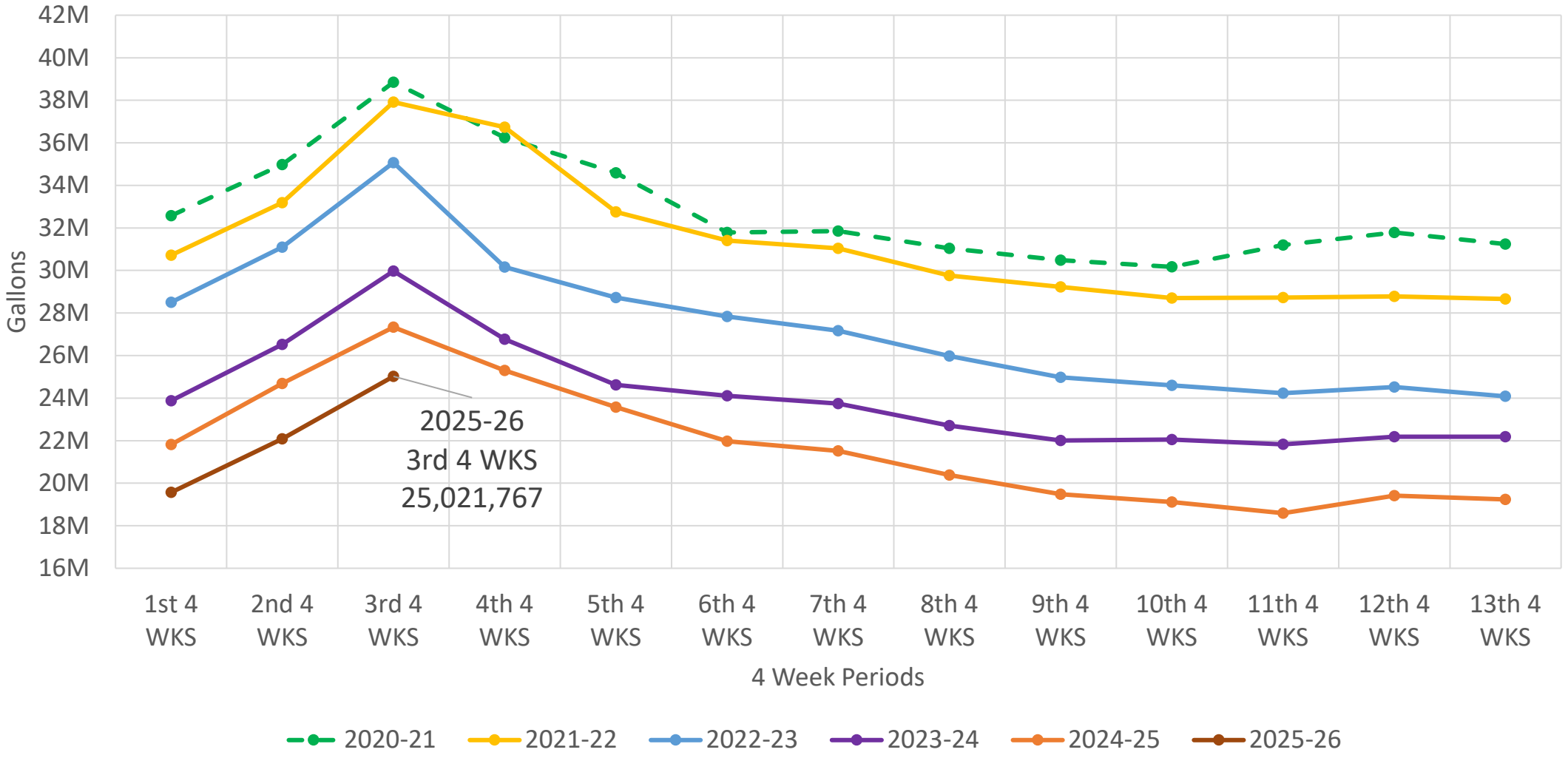
Average OJ Price (xAOC)



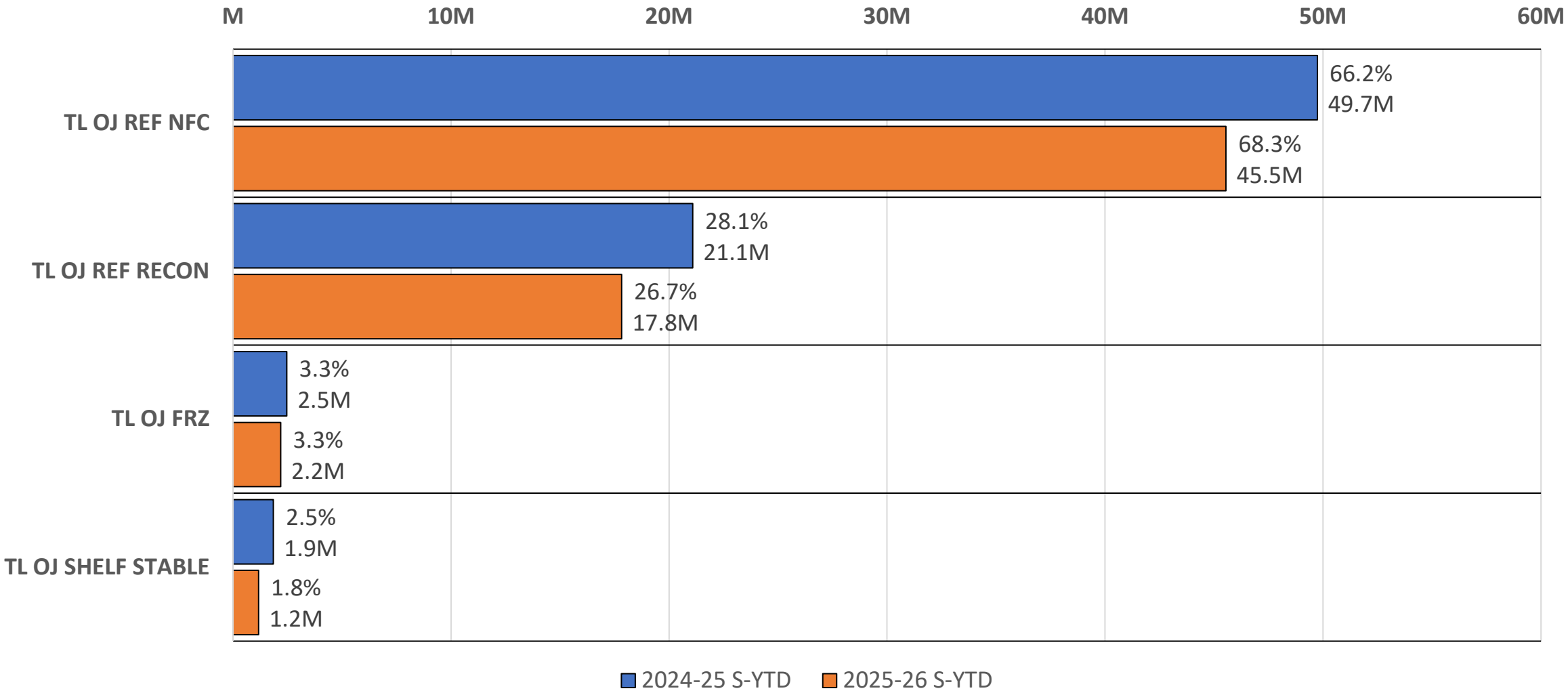
Total OJ Dollars (xAOC)



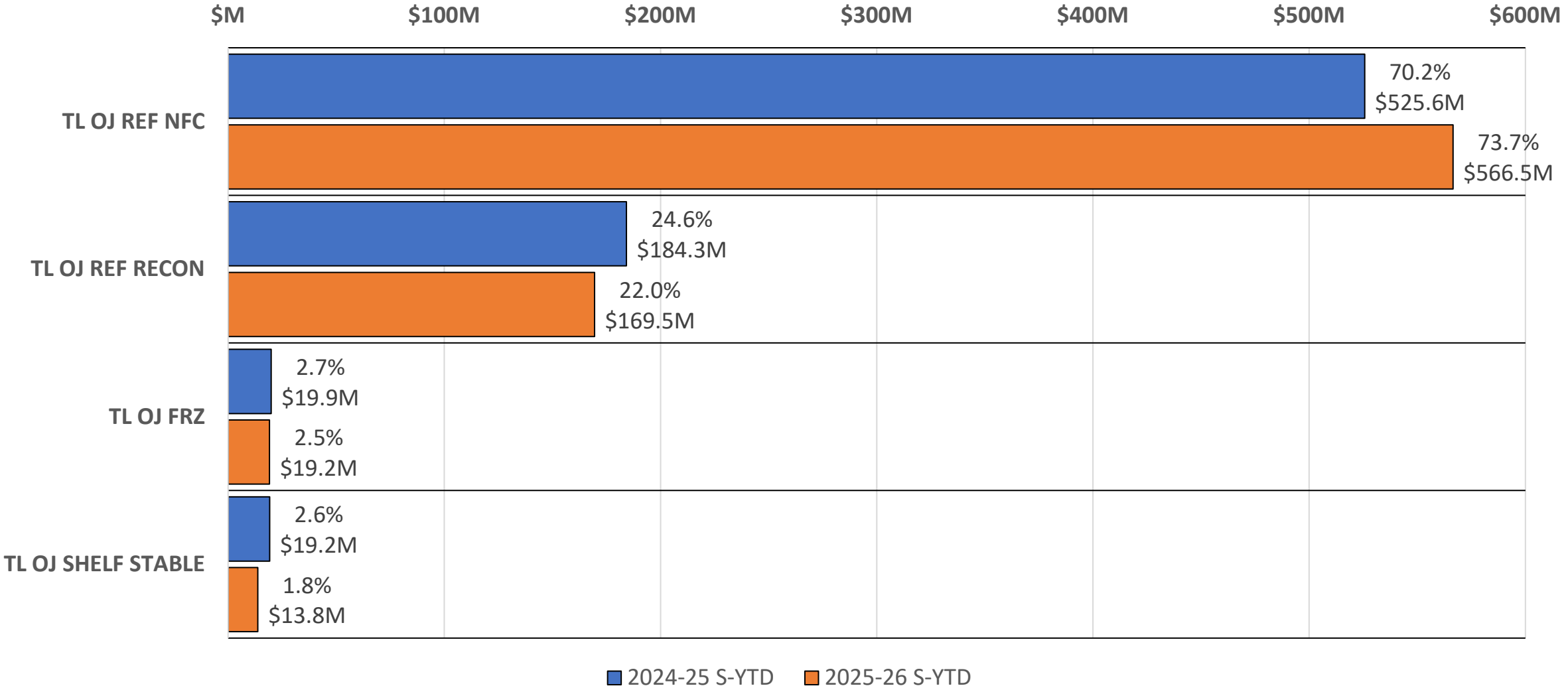
Total OJ Gallons (xAOC)



OJ Volume Share by Product



OJ Dollar Share by Product

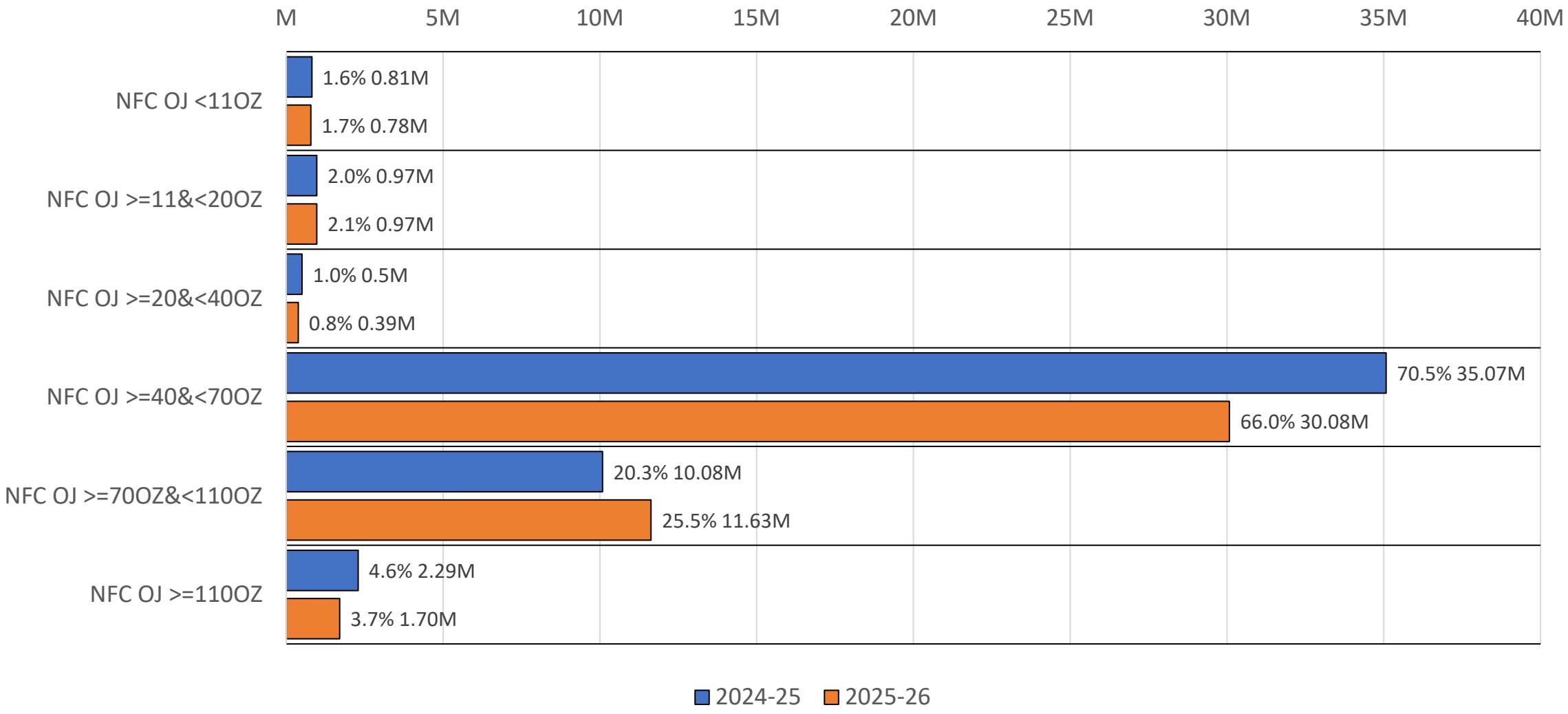


NFC Orange Juice

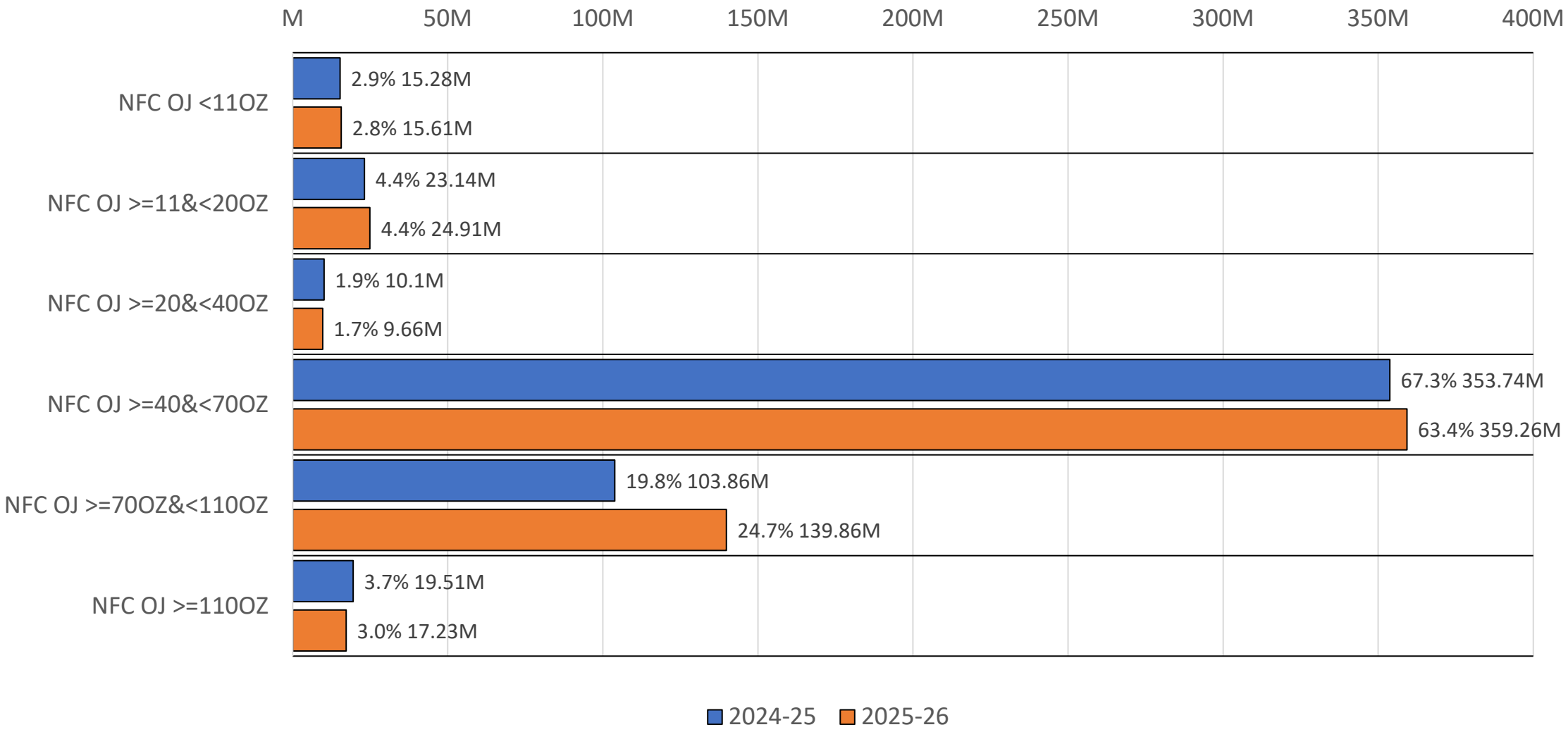
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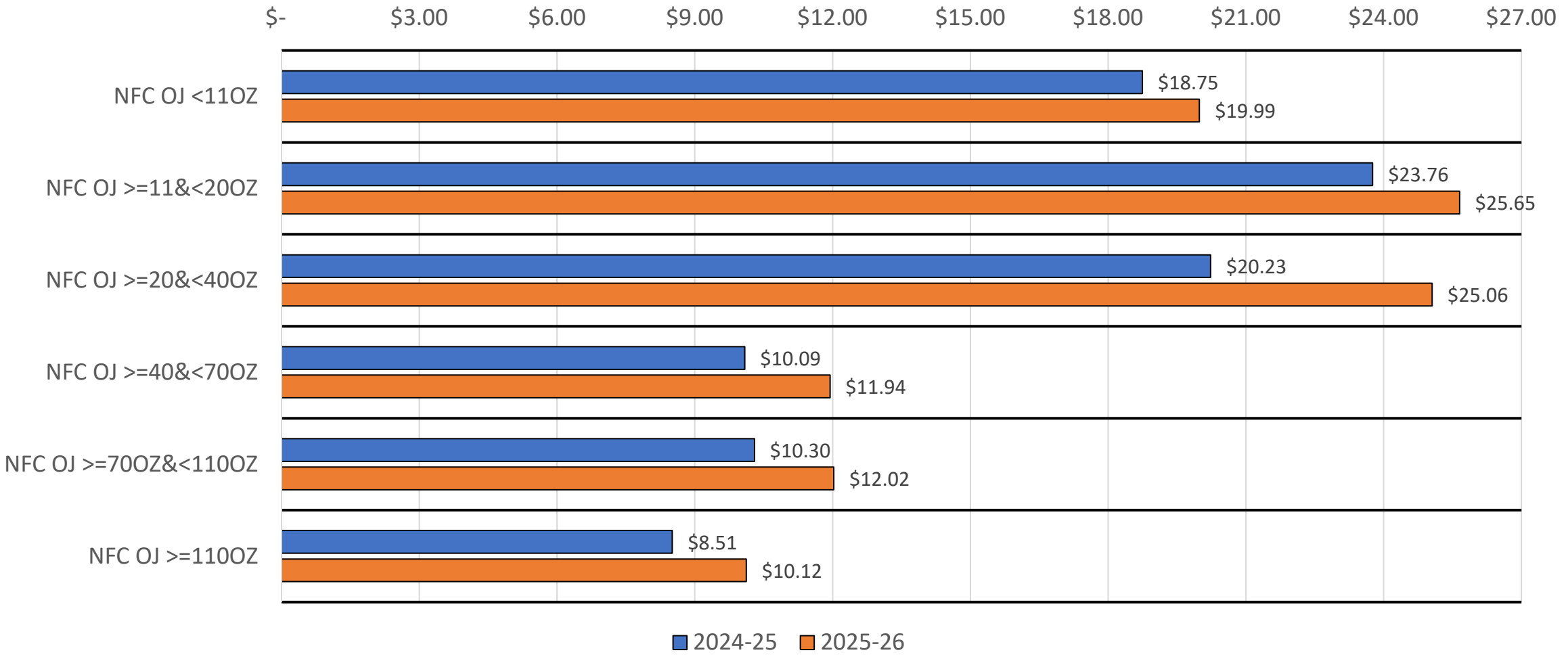
NFC OJ Gallon Sales by Size (S-YTD)



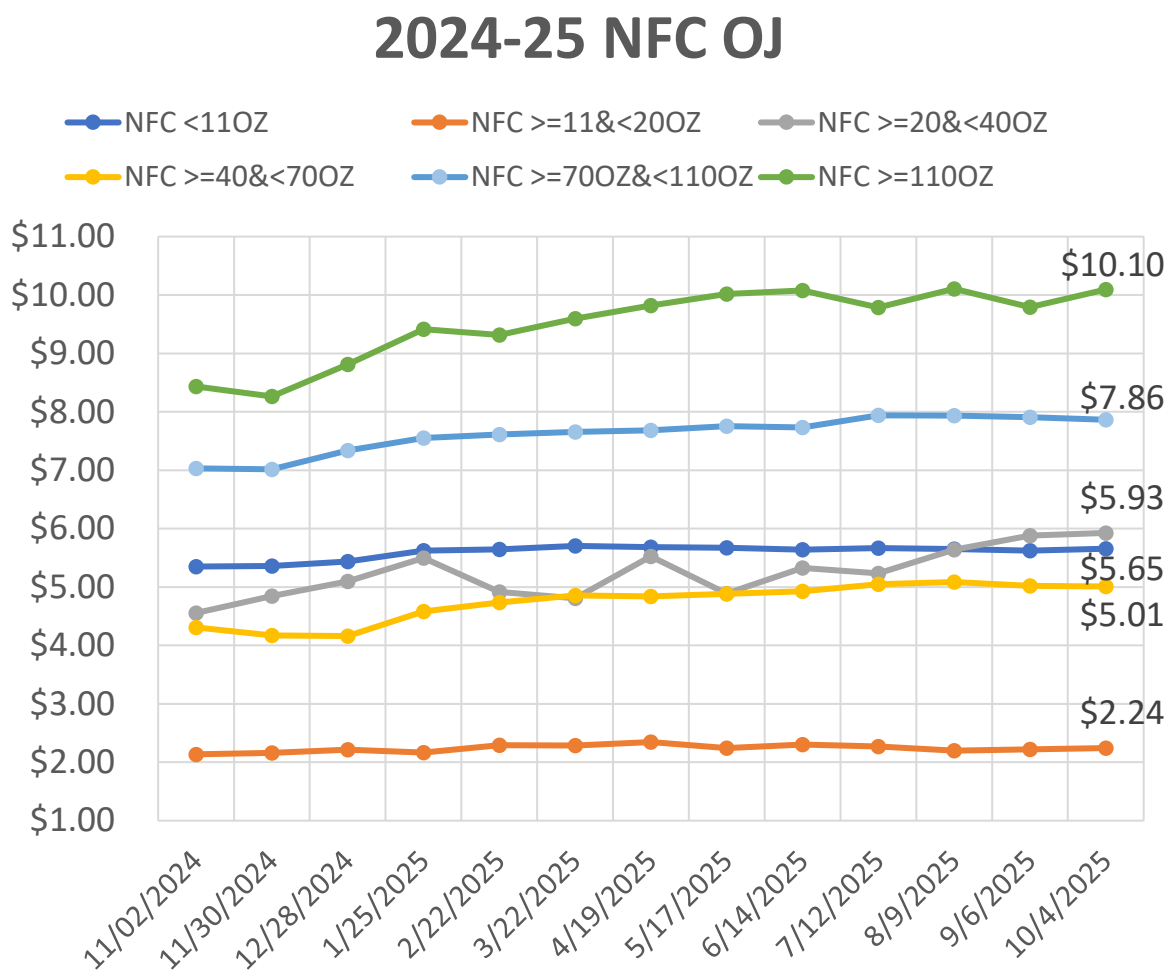
NFC OJ Dollar Sales by Size (S-YTD)

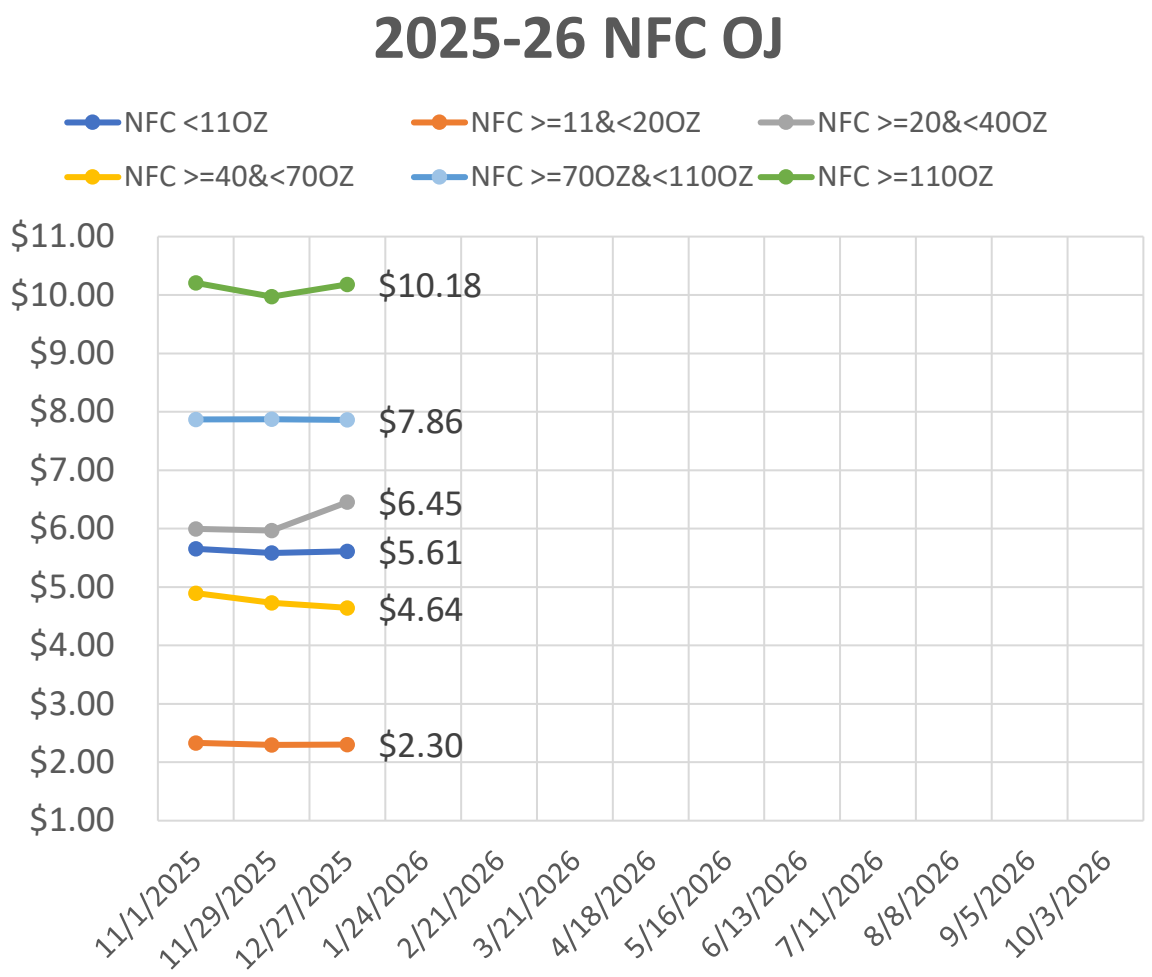


NFC OJ Dollars per Gallon by Size (S-YTD)

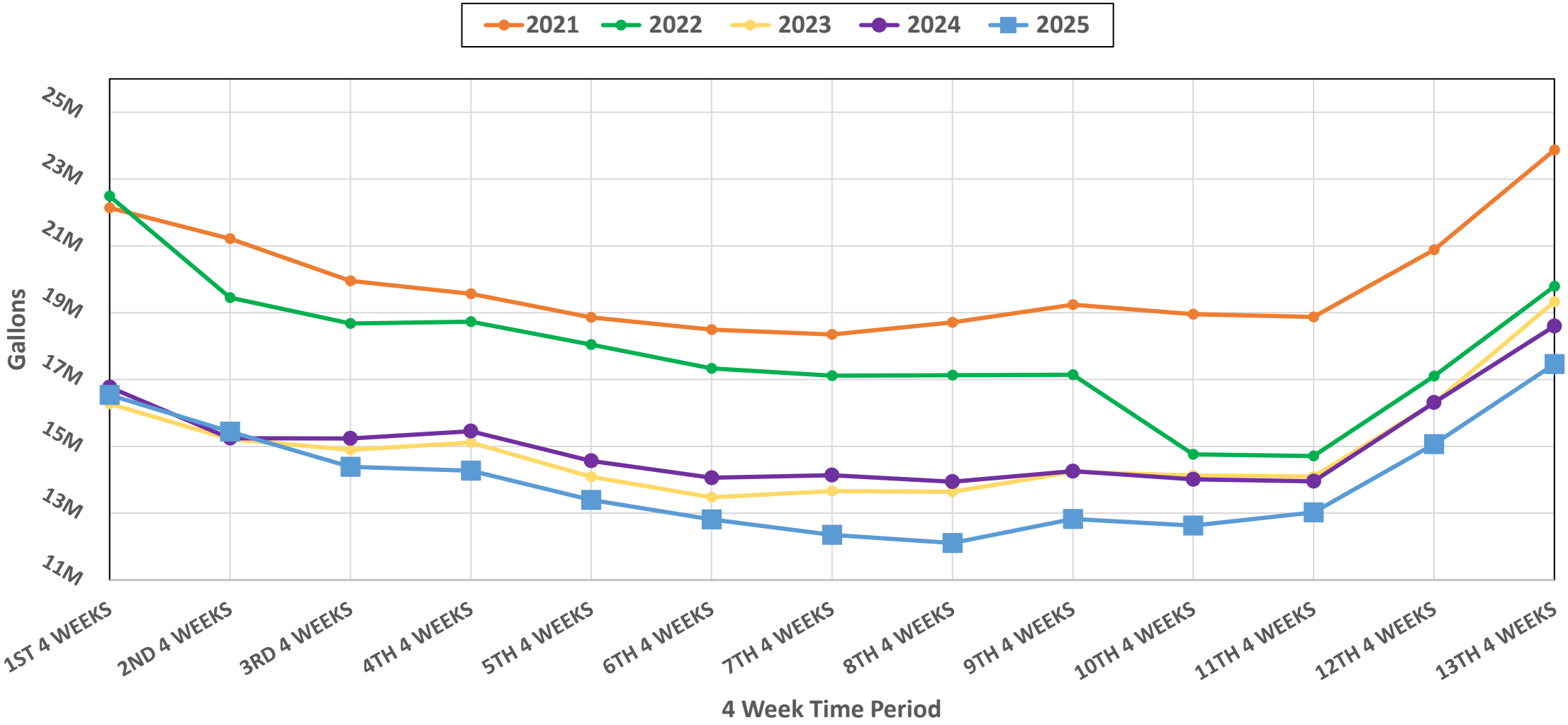


NFC OJ Average Retail Price by Size

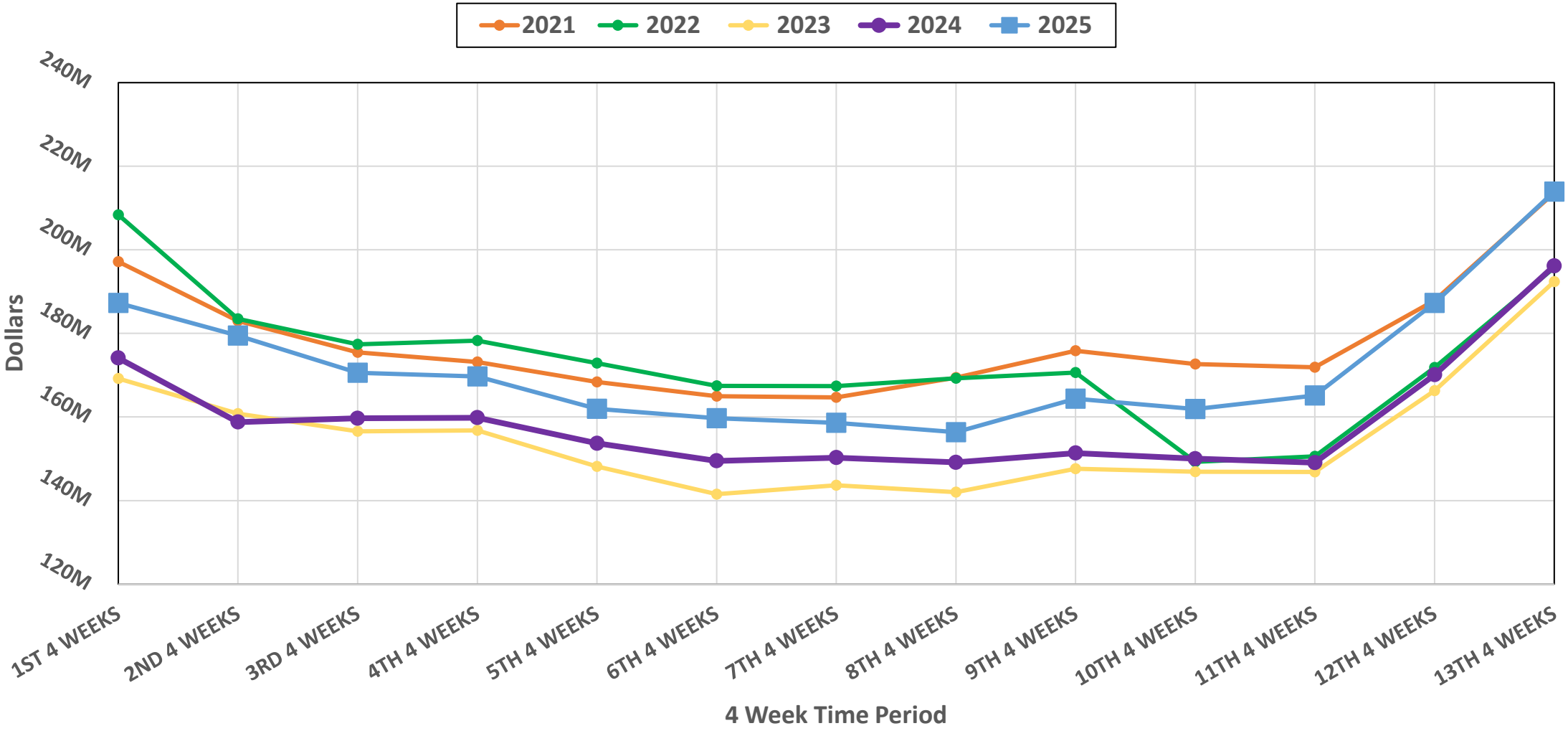




NFC OJ Gallon Sales (Year-over-Year)



NFC OJ Dollar Sales (Year-over-Year)

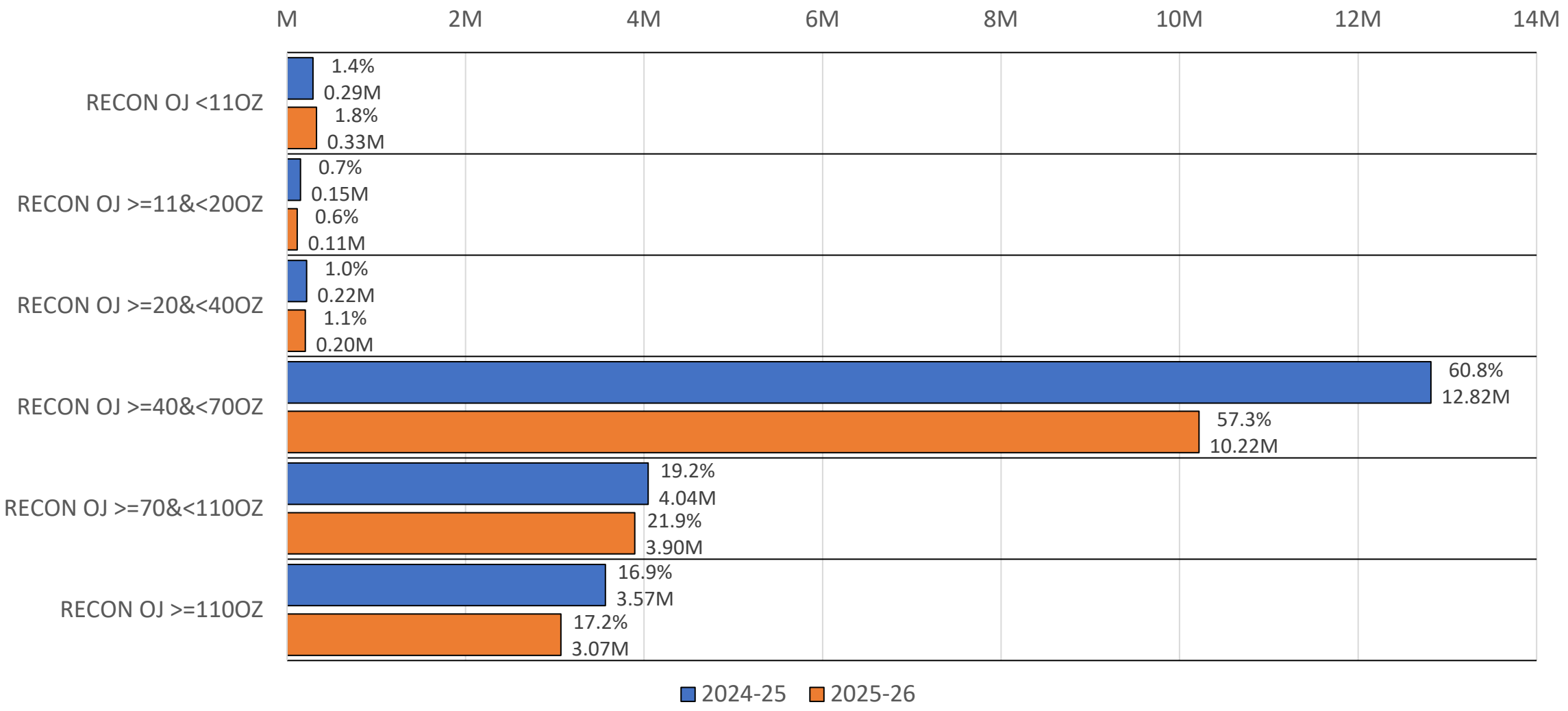


Recon Orange Juice

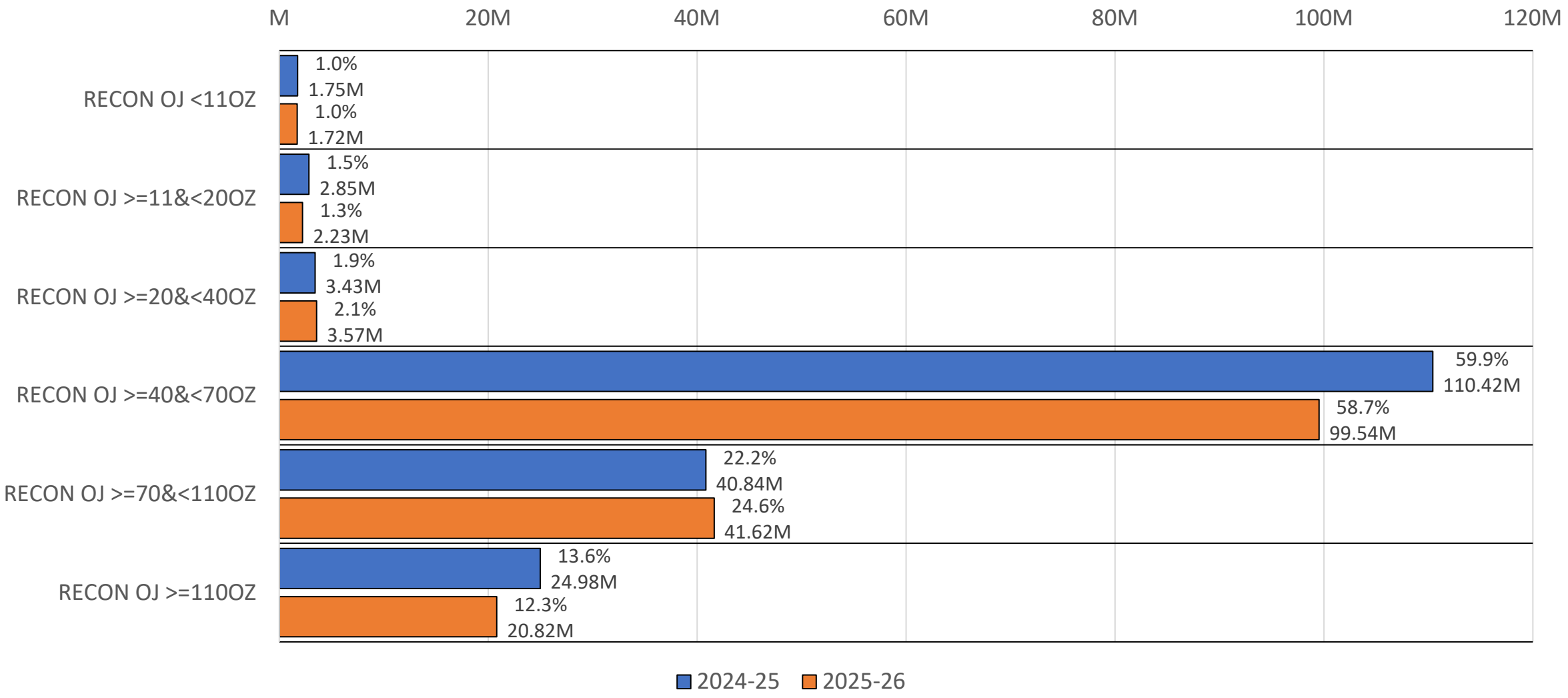
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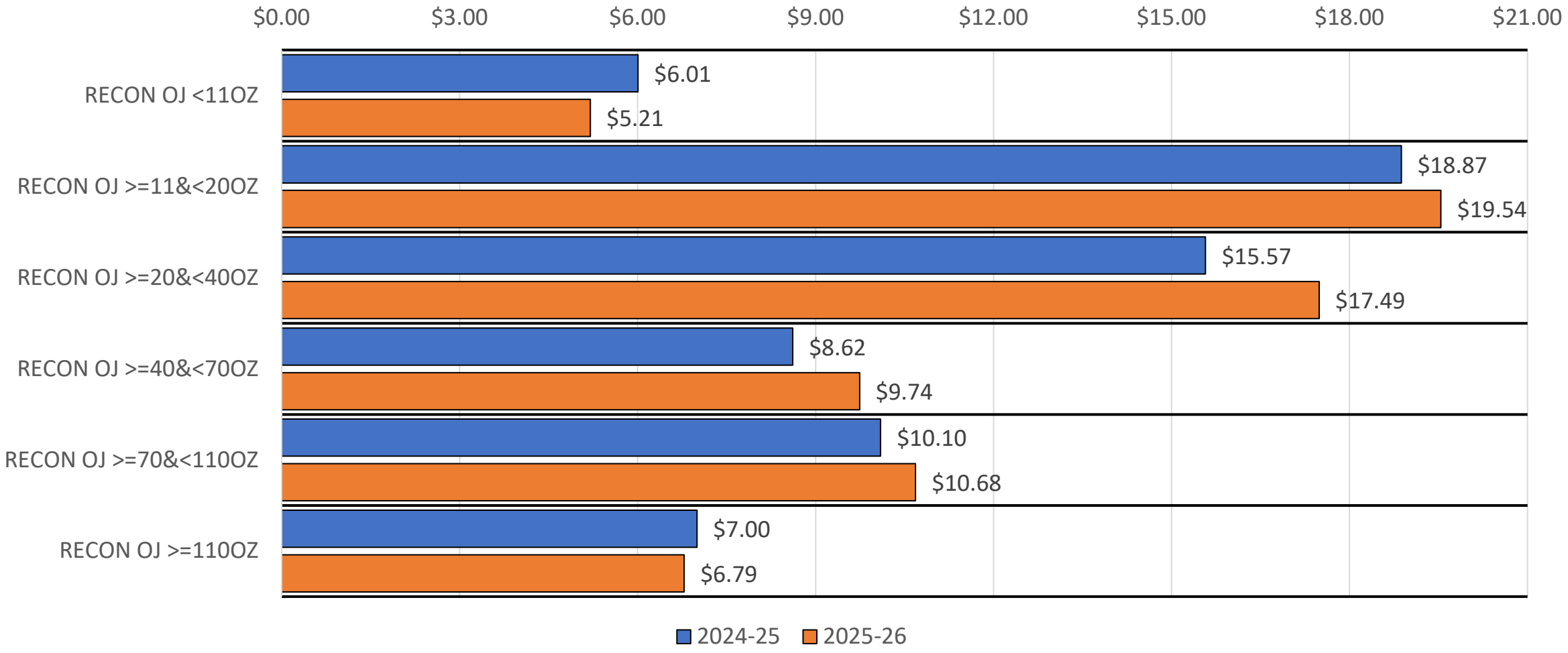
Recon OJ Gallon Sales by Size (S-YTD)



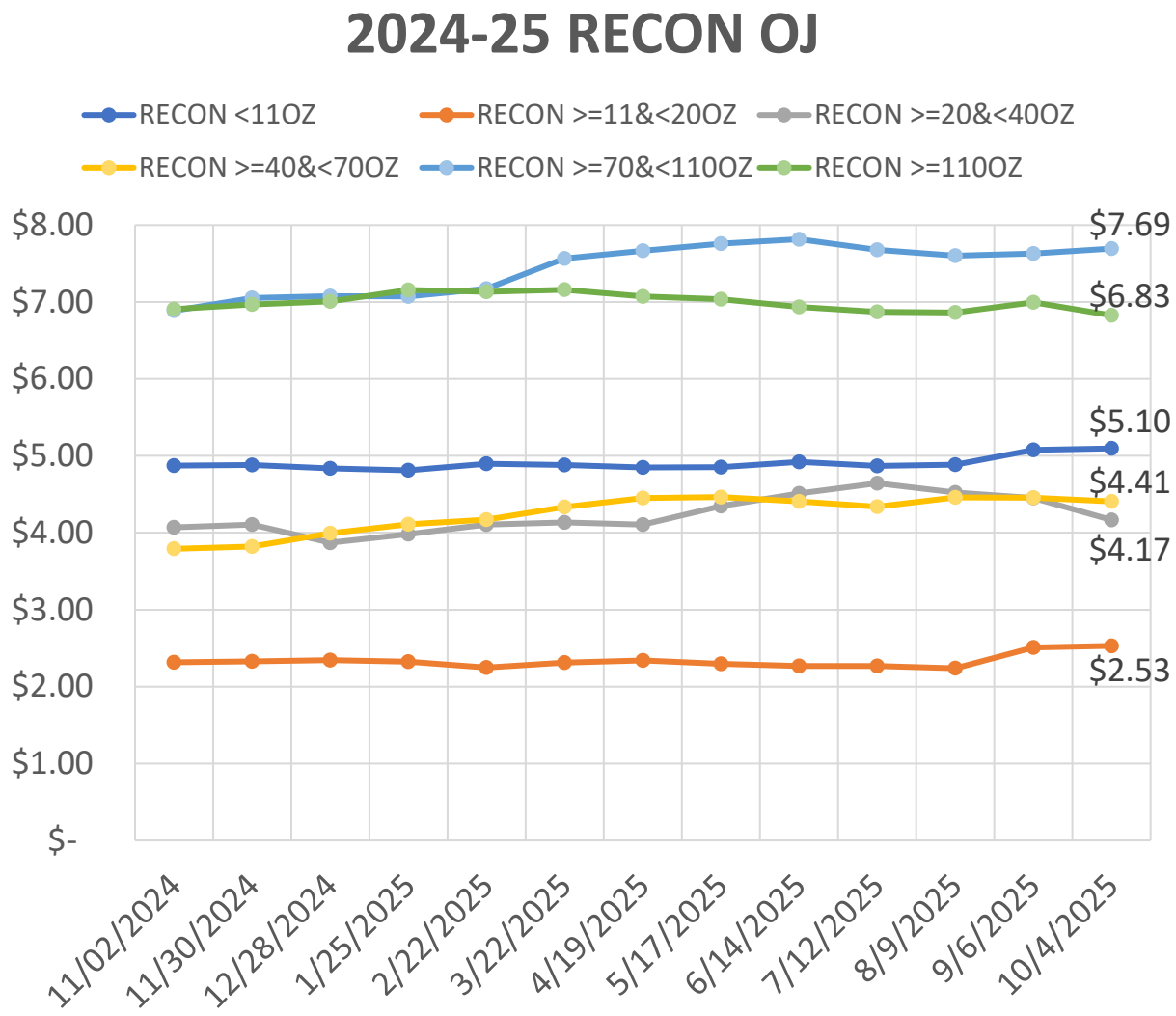
Recon OJ Dollar Sales by Size (S-YTD)

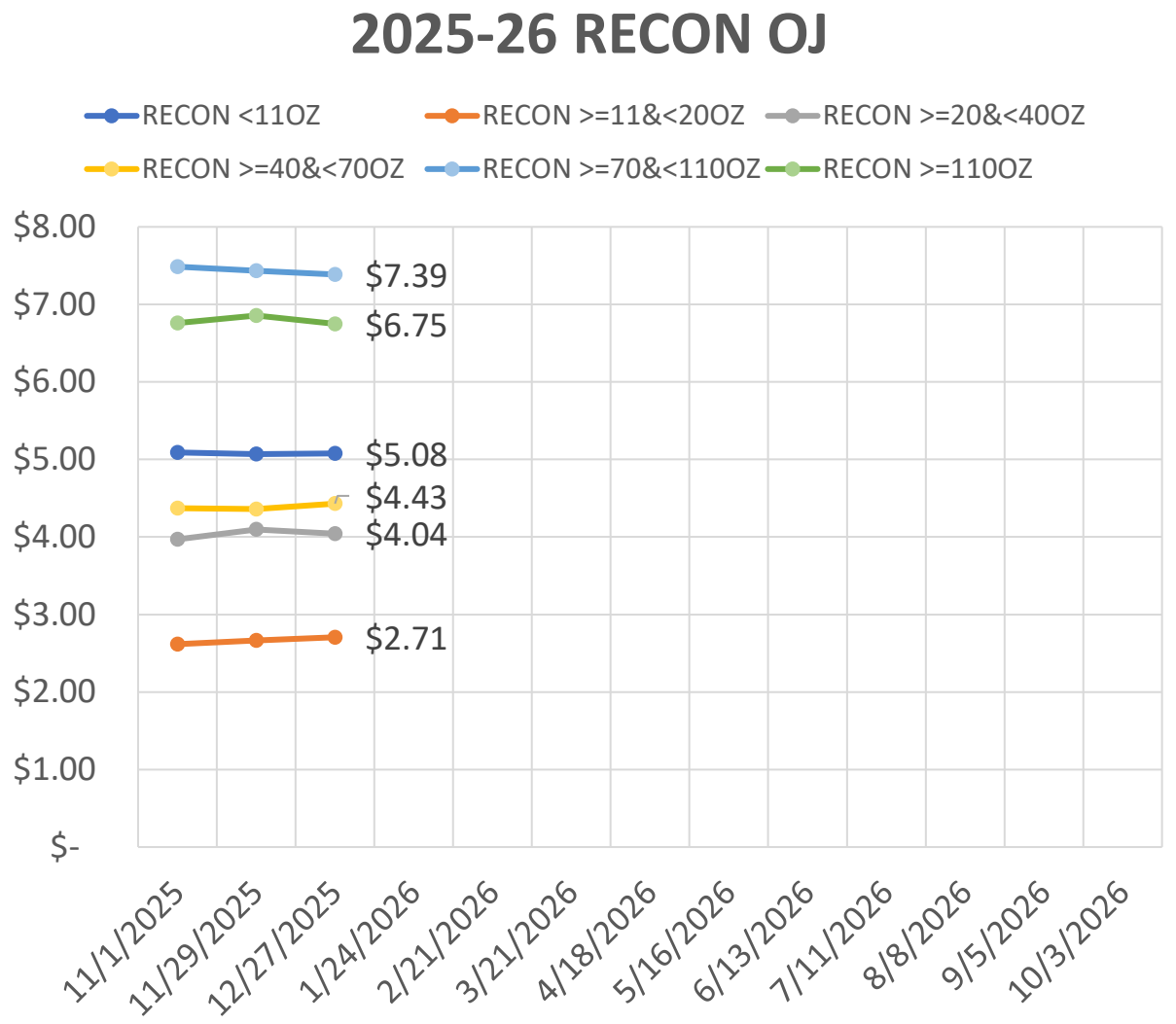


Recon OJ Dollars per Gallon by Size (S-YTD)

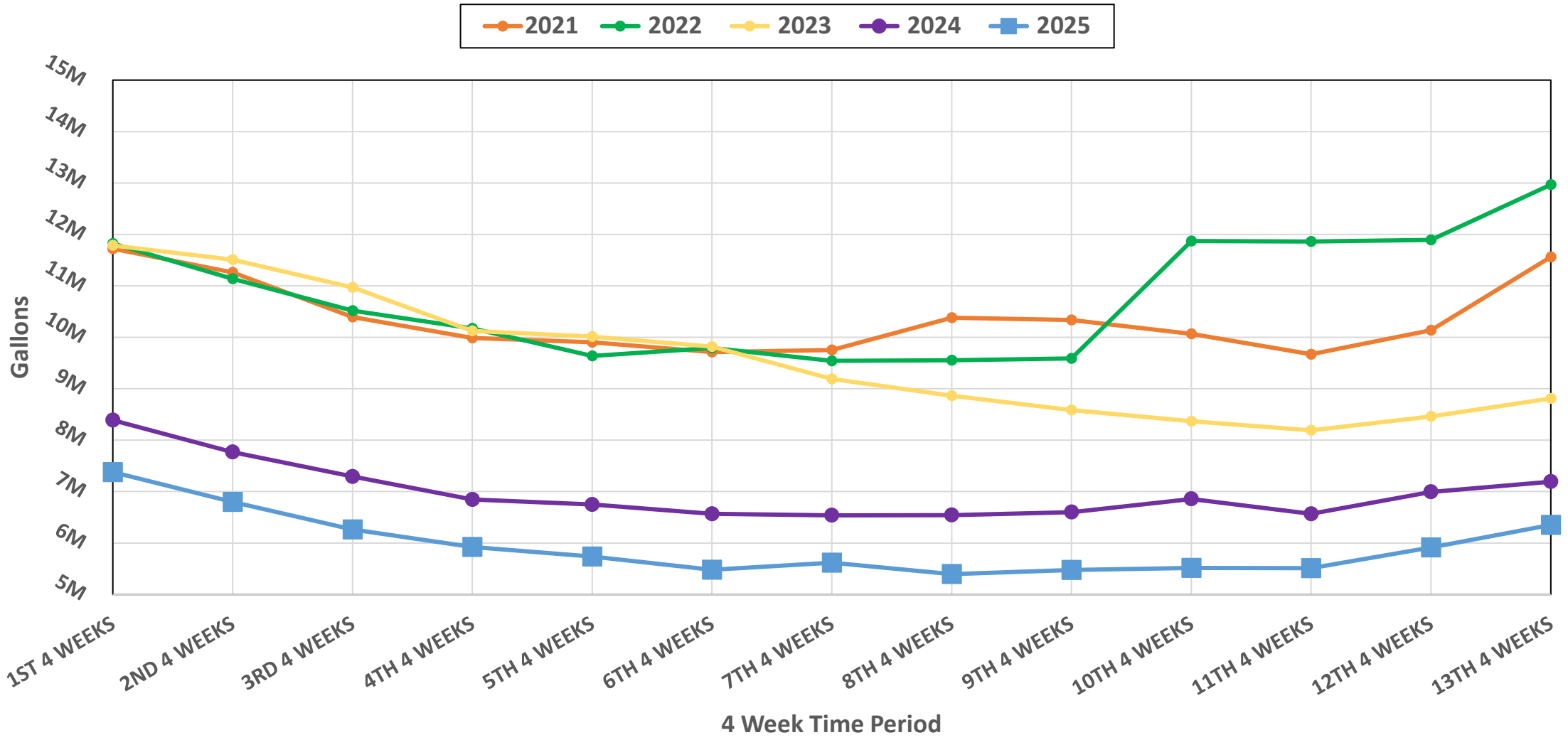


Recon OJ Average Retail Price by Size

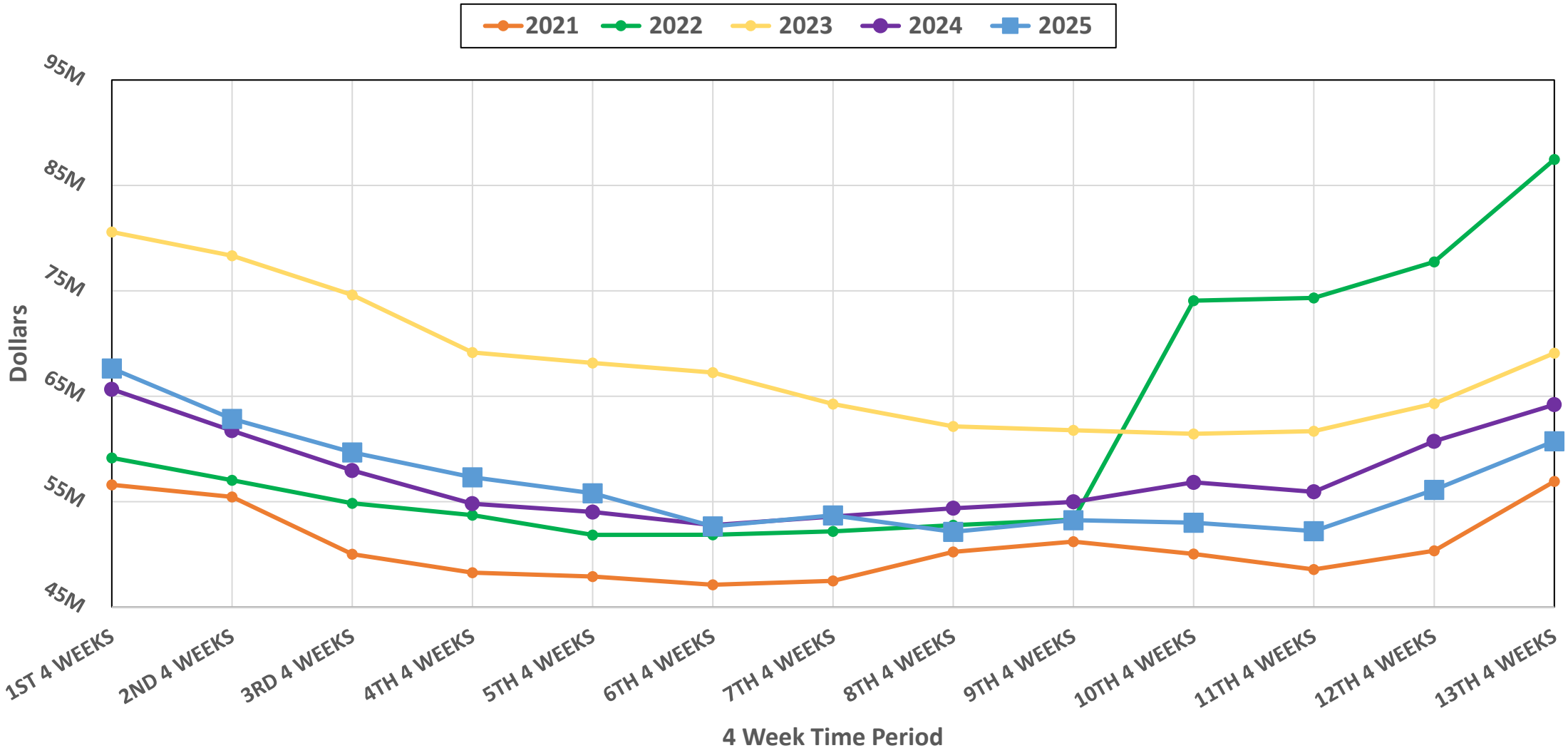




Recon OJ Gallon Sales (Year-over-Year)



Recon OJ Dollar Sales (Year-over-Year)



Orange Juice
Measures of Distribution

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Percent ACV Distribution

- All-commodity volume (ACV) is a weighted measure of product availability, or distribution, based on total store sales.
- Percent ACV is a percentage of stores where product is available (based on Nielsen data).
- Allows for equalization across different sized markets:
  - A large share of sales in a smaller market may or may not be a numerical driver compared to having a lesser share in a larger market.

NFC OJ Percent ACV Distribution

NFC% ACV Distribution by Container Size

- Percentage of retail stores where product is available

% ACV (% Stores Selling)	2025-26*	2024-25	2023-24
<11 oz	56.1	55.9	57.3
11-20 oz	81.3	80.3	83.0
20-40 oz.	16.5	16.8	15.1
40-70 oz	95.1	94.8	94.6
70-110 oz	73.4	72.1	72.5
>110 oz	34.3	40.9	42.6
Total NFC	96.1	96.2	95.9

*Season YTD from
Nielsen IQ Discover

Recon OJ Percent ACV Distribution

Recon % ACV Distribution by Container Size

- Percentage of retail stores where product is available

% ACV (% Stores Selling)	2025-26*	2024-25	2023-24
<11 oz	4.1	4.6	4.2
11-20 oz	16.7	19.4	19.1
20-40 oz.	12.3	13.1	13.1
40-70 oz	76.9	75.9	75.7
70-110 oz	50.2	50.7	52.3
>110 oz	28.1	38.5	61.3
Total Recon	84.2	84.3	83.7

*Season YTD from
Nielsen IQ Discover

Percent Change in Total Distribution Points (TDP)

- **TDP is a measure that summarizes both span and depth of distribution.**
- **Summarizes percent ACV (span) and the Average Number of Items/ UPCs (depth) available.**
- **Sometimes, TDP and Average Items Carried will be redundant. If percent ACV is high (95% or more), then TDPs are essentially equivalent to Avg Items Carried.**

NFC OJ Percent Change in TDP

% Chg in TDP	% Chg from 2024-25 to 2025-26*	% Chg from 2023-24 to 2024-25	% Chg from 2022-23 to 2023-24
<11 oz	-3.88%	-6.63%	2.72%
11-20 oz	10.66%	-5.11%	1.94%
20-40 oz.	-20.77%	29.36%	10.43%
40-70 oz	-1.36%	-4.07%	1.57%
70-110 oz	-2.12%	-9.32%	-3.42%
>110 oz	-14.84%	-13.40%	-4.98%
Total NFC	-1.17%	-5.21%	0.39%

*Season YTD from Nielsen IQ Discover

Recon OJ Percent Change in TDP

% Chg in TDP	% Chg from 2024-25 to 2025-26*	% Chg from 2023-24 to 2024-25	% Chg from 2022-23 to 2023-24
<11 oz	-11.59%	1.62%	-35.00%
11-20 oz	-22.17%	5.46%	15.16%
20-40 oz.	-8.19%	-3.10%	-1.64%
40-70 oz	-11.63%	-8.17%	-11.40%
70-110 oz	10.11%	35.66%	-6.40%
>110 oz	-33.09%	-51.23%	-5.20%
Total Recon	-9.64%	-7.85%	-9.14%

*Season YTD from Nielsen IQ Discover

Percent Change in Average Number of Items per Store

- **The number of items, on average, that a retailer carries of a category, segment, or brand.**
- **Measured by number of UPCs.**
- **It can be calculated by taking the sum of percent ACV Distribution of all the items divided by the percent ACV Distribution of the brand/ category.**

NFC OJ Average Number of Items per Store Percent Change

% Chg in Items per Store	% Chg from 2024-25 to 2025-26*	% Chg from 2023-24 to 2024-25	% Chg from 2022-23 to 2023-24
<11 oz	-4.19%	-3.56%	-2.53%
11-20 oz	9.20%	-1.98%	3.28%
20-40 oz.	-19.70%	14.32%	8.83%
40-70 oz	-1.66%	-3.94%	1.95%
70-110 oz	-3.78%	-9.41%	-2.41%
>110 oz	1.53%	-0.23%	4.62%
Total NFC	-1.02%	-5.19%	0.81%

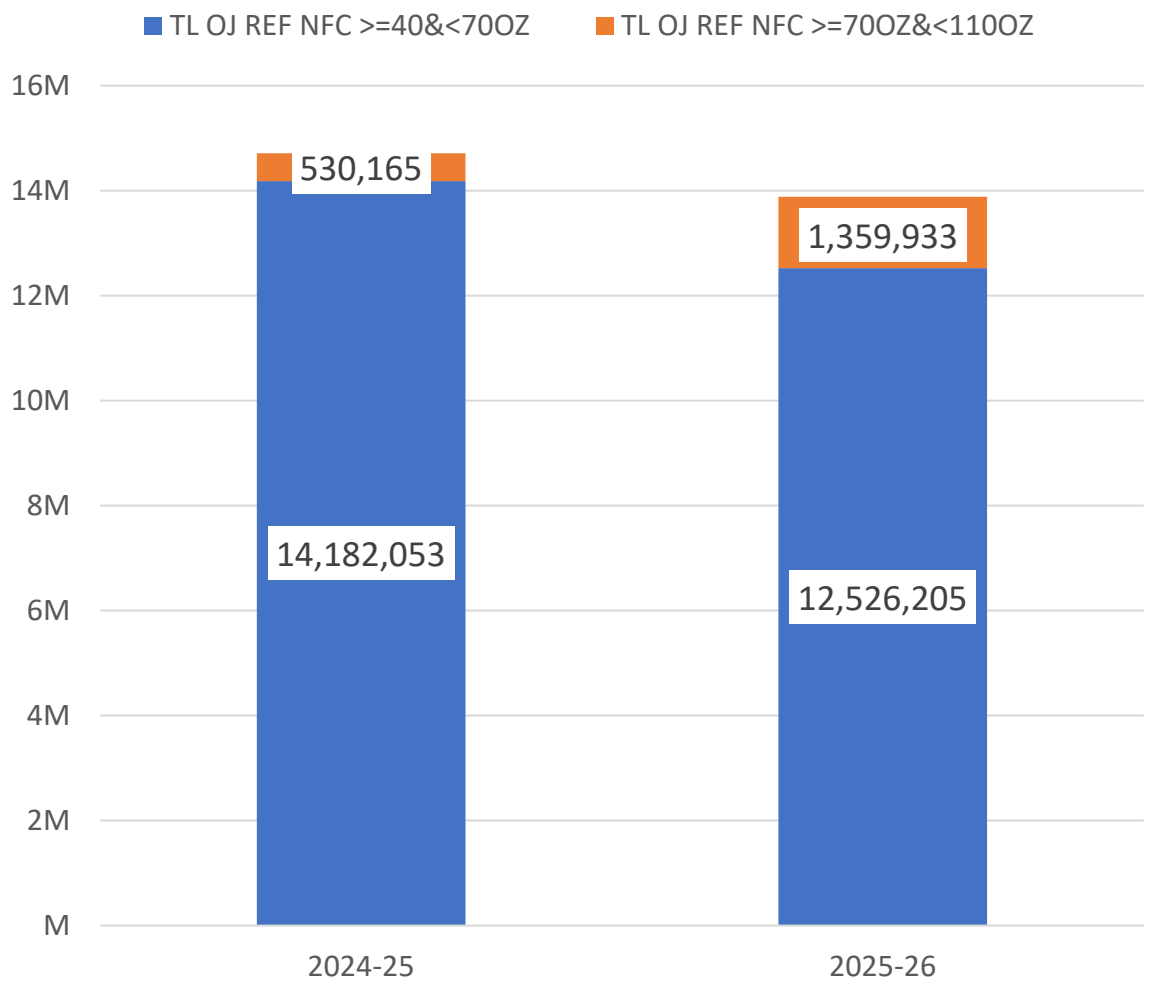
*Season YTD from Nielsen IQ Discover

Recon OJ Average Number of Items per Store Percent Change

% Chg in Items per Store	% Chg from 2024-25 to 2025-26*	% Chg from 2023-24 to 2024-25	% Chg from 2022-23 to 2023-24
<11 oz	0.00%	-0.05%	-3.66%
11-20 oz	-9.58%	6.37%	6.83%
20-40 oz.	-2.72%	-0.18%	0.97%
40-70 oz	-12.70%	-8.03%	-11.29%
70-110 oz	11.24%	41.35%	2.39%
>110 oz	-8.50%	-10.76%	-4.25%
Total Recon	-9.54%	-7.31%	-9.03%

*Season YTD from Nielsen IQ Discover

NFC OJ Gallons Sold on Promotion



Product	NO PROMO		ANY PROMO	
	2024-25	2025-26	2024-25	2025-26
TL OJ REF NFC <11OZ	737,649	721,489	77,245	59,708
TL OJ REF NFC >=11&<20OZ	773,122	737,011	200,909	233,886
TL OJ REF NFC >=20&<40OZ	317,870	326,273	181,561	59,154
TL OJ REF NFC >=40&<70OZ	20,891,027	17,550,980	14,182,053	12,526,205
TL OJ REF NFC >=70OZ&<110OZ	9,553,812	10,271,218	530,165	1,359,933
TL OJ REF NFC >=110OZ	1,878,115	1,522,881	414,430	180,365
TL OJ REF NFC	**34,151,595**	**31,129,852**	**15,586,363**	**14,419,251**

Product	NO PROMO		ANY PROMO	
	2024-25	2025-26	2024-25	2025-26
TL OJ REF NFC <11OZ	1.5%	1.6%	0.2%	0.1%
TL OJ REF NFC >=11&<20OZ	1.6%	1.6%	0.4%	0.5%
TL OJ REF NFC >=20&<40OZ	0.6%	0.7%	0.4%	0.1%
TL OJ REF NFC >=40&<70OZ	42.0%	38.5%	28.5%	27.5%
TL OJ REF NFC >=70OZ&<110OZ	19.2%	22.5%	1.1%	3.0%
TL OJ REF NFC >=110OZ	3.8%	3.3%	0.8%	0.4%
TL OJ REF NFC	**68.7%**	**68.3%**	**31.3%**	**31.7%**

NFC OJ Gallons Sold on Promotion

	NO PROMO GALLONS		ANY PROMO GALLONS		ANY FEAT W/O DISP GALLONS		ANY DISP W/O FEAT GALLONS		ANY FEAT AND DISP GALLONS		PRICE DECR GALLONS	
Size	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**
NFC <11OZ	737,649	721,489	77,245	59,708	8,176	3,477	2,157	1,971	0	9	72,689	57,853
NFC >=11&<20OZ	773,122	737,011	200,909	233,886	17,912	19,663	9,820	9,825	149	51	188,602	224,855
NFC >=20&<40OZ	317,870	326,273	181,561	59,154	45,849	4,975	721	1,522	1,379	82	180,124	56,653
NFC >=40&<70OZ	20,891,027	17,550,980	14,182,053	12,526,205	6,787,395	5,613,259	1,153,577	827,693	457,773	325,504	12,722,286	11,780,146
NFC >=70OZ&<110OZ	9,553,812	10,271,218	530,165	1,359,933	161,509	259,085	36,577	79,059	3,673	12,604	405,785	1,273,761
NFC >=110OZ	1,878,115	1,522,881	414,430	180,365	327,172	1,472	4,683	3,750	0	0	379,878	177,326
NFC TOTAL	**34,151,595**	**31,129,852**	**15,586,363**	**14,419,251**	**7,348,013**	**5,901,931**	**1,207,535**	**923,820**	**462,974**	**338,250**	**13,949,363**	**13,570,594**

Recon OJ Gallons Sold on Promotion

	NO PROMO GALLONS		ANY PROMO GALLONS		ANY FEAT W/O DISP GALLONS		ANY DISP W/O FEAT GALLONS		ANY FEAT AND DISP GALLONS		PRICE DECR GALLONS	
Size	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**
RECON <11OZ	290,257	329,566	1,607	117	28	0	245	0	0	0	1,362	117
RECON >=11&<20OZ	130,561	103,601	20,217	10,355	4,030	585	2,996	786	170	0	13,832	9,005
RECON >=20&<40OZ	139,503	135,325	80,781	68,702	33	223	643	1,031	0	0	80,375	67,581
RECON >=40&<70OZ	9,066,502	6,696,696	3,748,751	3,520,891	1,162,949	675,753	124,247	96,304	80,701	23,973	3,542,555	3,371,520
RECON >=70OZ&<110OZ	3,749,472	2,307,092	295,527	1,588,733	40,634	64,419	21,704	15,984	621	938	268,420	1,570,821
RECON >=110OZ	3,137,873	2,281,710	429,683	786,012	79,712	147,268	34,913	24,048	247	0	347,721	628,155
RECON TOTAL	**16,514,167**	**11,853,991**	**4,576,566**	**5,974,809**	**1,287,386**	**888,248**	**184,747**	**138,152**	**81,739**	**24,911**	**4,254,265**	**5,647,200**

NFC + Recon OJ Gallons Sold on Promotion

	NO PROMO GALLONS		ANY PROMO GALLONS		ANY FEAT W/O DISP GALLONS		ANY DISP W/O FEAT GALLONS		ANY FEAT AND DISP GALLONS		PRICE DECR GALLONS	
Size	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**
REF OJ <11OZ	1,027,905	1,051,054	78,852	59,826	8,204	3,477	2,402	1,971	0	9	74,051	57,970
REF OJ >=11&<20OZ	903,684	840,612	221,126	244,241	21,942	20,248	12,816	10,611	319	51	202,434	233,861
REF OJ >=20&<40OZ	457,373	461,598	262,341	127,855	45,882	5,199	1,364	2,553	1,379	82	260,500	124,234
REF OJ >=40&<70OZ	29,957,529	24,247,677	17,930,804	16,047,096	7,950,344	6,289,012	1,277,823	923,997	538,474	349,477	16,264,841	15,151,666
REF OJ >=70OZ&<110OZ	13,303,284	12,578,310	825,692	2,948,666	202,143	323,504	58,282	95,043	4,294	13,542	674,205	2,844,582
REF OJ >=110OZ	5,015,988	3,804,591	844,113	966,377	406,884	148,739	39,596	27,798	247	0	727,599	805,481
REF OJ TOTAL	**50,665,762**	**42,983,842**	**20,162,929**	**20,394,060**	**8,635,399**	**6,790,178**	**1,392,283**	**1,061,972**	**544,713**	**363,162**	**18,203,629**	**19,217,794**

OJ Blends and Drinks

Florida Citrus™

FLORIDA DEPARTMENT OF CITRUS

Definitions

- 100% OJ
  - A beverage that contains only orange juice, water (if reconstituted from OJ concentrate).
  - May include fortifying vitamins and minerals, such as Calcium and Vitamin D.
  - May include tangerine juice.*
- OJ Blends (100% Juice)
  - A beverage that includes orange juice **plus** one or more fruit juice or fruit/ vegetable extract that is not orange juice. Does not contain added sweeteners or additives.
- OJ Drinks
  - A beverage that include orange juice **plus** added sweeteners or additives (not including Calcium, Vitamin D, or other fortifying vitamins and minerals).
- OJ Blend Drinks
  - A beverage that includes orange juice **plus** one or more fruit juice or fruit/ vegetable extract that is not orange juice **plus** added sweeteners or additives.

**** Under 21 CFR §146.140(a), the standard of identity for pasteurized orange juice allows for the inclusion of juice from Citrus reticulata, including mandarin or tangerine oranges and their hybrids, at a level not exceeding 10 percent by volume.***

Total OJ Blends and Drinks – 4 Weeks ending 12/27/25

	Gallons			Dollars			Price per EQ Gallon		
	4 Weeks YA	4 Weeks	% Chg	4 Weeks YA	4 Weeks	% Chg	4 Weeks YA	4 Weeks	% Chg
TL OJ (100% OJ)	27,923,158	25,021,767	-10.39%	$280,409,373	$286,635,947	2.22%	$10.04	$11.46	14.07%
TL of All OJ Blends/ Drinks	15,185,922	13,889,571	-8.54%	$98,704,371	$94,259,984	-4.50%	$6.50	$6.79	4.41%
OJ Blend (100% Juice)	1,996,705	1,322,098	-33.79%	$20,175,437	$15,507,980	-23.13%	$10.10	$11.73	16.09%
OJ Drink	2,304,336	1,826,583	-20.73%	$23,976,142	$22,832,985	-4.77%	$10.40	$12.50	20.14%
OJ Blend Drink	10,884,881	10,740,890	-1.32%	$54,552,792	$55,919,019	2.50%	$5.01	$5.21	3.88%

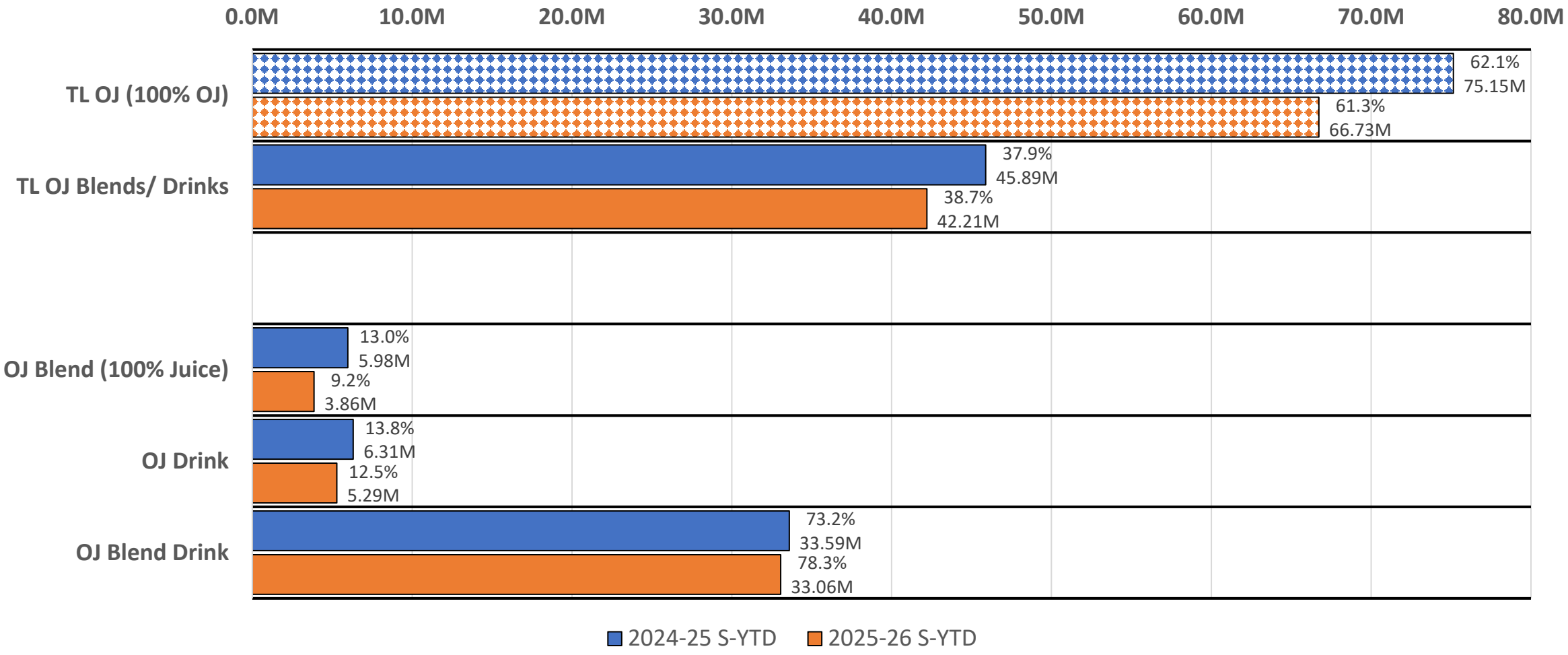
Total OJ Blends and Drinks - SYTD

TOTAL US - XAOC

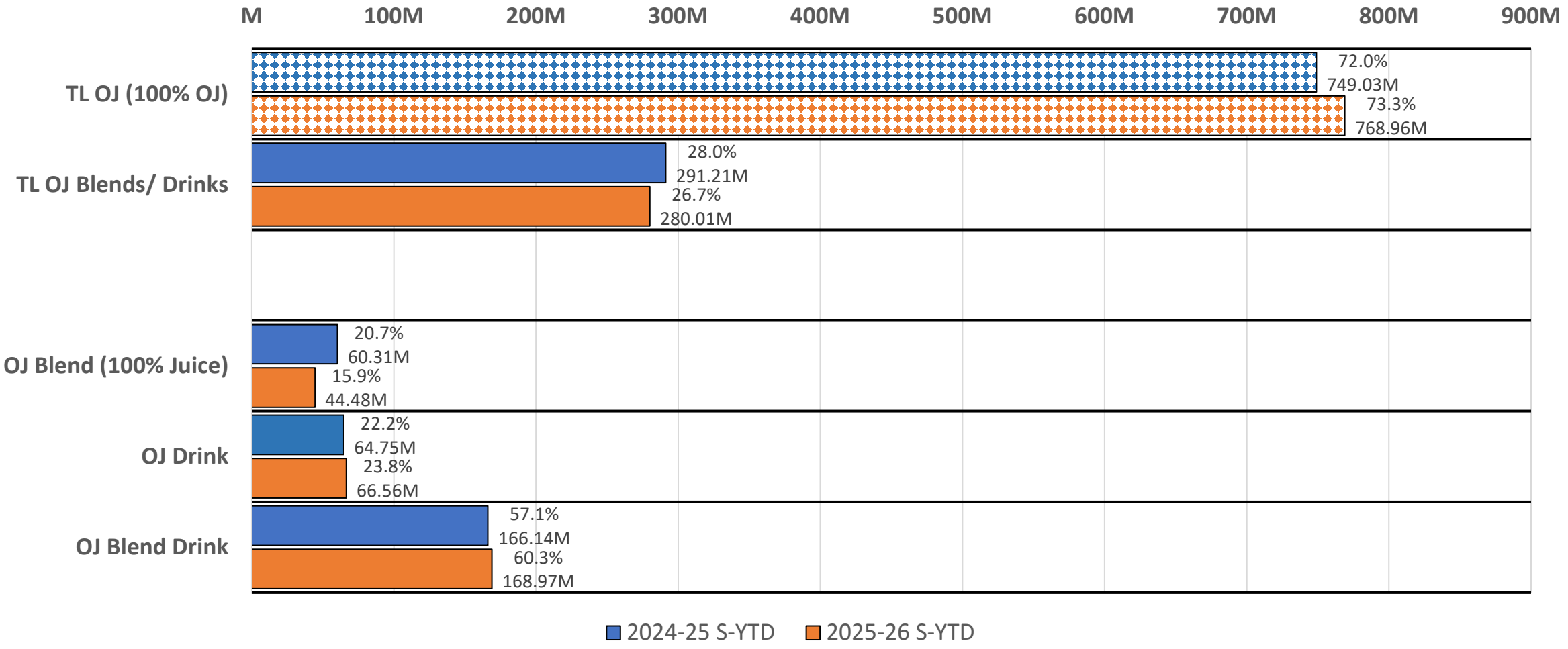
Season Year to Date

	Gallons			Dollars			Price per EQ Gallon		
	2024-25	2025-26	% Chg	2024-25	2025-26	% Chg	2024-25	2025-26	% Chg
TL OJ (100% OJ)	75,146,745	66,730,495	-11.20%	$749,025,974	$768,959,622	2.66%	$9.97	$11.52	15.61%
TL of All OJ Blends/ Drinks	45,888,649	42,207,985	-8.02%	$291,205,017	$280,014,262	-3.84%	$6.35	$6.63	4.54%
OJ Blend (100% Juice)	5,983,655	3,862,206	-35.45%	$60,312,547	$44,484,041	-26.24%	$10.08	$11.52	14.27%
OJ Drink	6,312,773	5,288,643	-16.22%	$64,751,150	$66,556,632	2.79%	$10.26	$12.58	22.69%
OJ Blend Drink	33,592,222	33,057,136	-1.59%	$166,141,320	$168,973,589	1.70%	$4.95	$5.11	3.35%

Total OJ Blends and Drinks Volume Share by Product



Total OJ Blends and Drinks Dollar Share by Product



Total OJ Blends and Drinks Percent ACV Distribution

Total OJ Blends and Drinks % ACV Distribution

- Percentage of retail stores where product is available

% ACV (% Stores Selling)	2025-26*	2024-25	2023-24
OJ Blend (100% Juice)	80.2	82.7	82.4
OJ Drink	79.3	79.7	78.8
OJ Blend Drink	87.7	86.4	87.0
TL OJ (100% OJ)	97.5	97.8	97.6

*Season YTD from
Nielsen IQ Discover

Total OJ Blends and Drinks Percent Change in TDP

% Chg in TDP	% Chg from 2024-25 to 2025-26*	% Chg from 2023-24 to 2024-25	% Chg from 2022-23 to 2023-24
OJ Blend (100% Juice)	-15.2%	-16.3%	-1.1%
OJ Drink	-11.1%	-2.6%	4.4%
OJ Blend Drink	-0.8%	4.3%	1.2%
TL OJ (100% OJ)	-7.3%	-6.9%	-4.9%

*Season YTD from Nielsen IQ Discover

Total OJ Blends and Drinks Average Number of Items per Store Percent Change

% Chg in Items per Store	% Chg from 2024-25 to 2025-26*	% Chg from 2023-24 to 2024-25	% Chg from 2022-23 to 2023-24
OJ Blend (100% Juice)	-12.7%	-16.1%	-1.4%
OJ Drink	-10.6%	-3.5%	3.4%
OJ Blend Drink	-2.3%	4.5%	3.1%
TL OJ (100% OJ)	-7.0%	-6.7%	-4.4%

*Season YTD from Nielsen IQ Discover

Grapefruit Juice

Florida Citrus™

FLORIDA DEPARTMENT OF CITRUS

Total GJ – 4 Weeks ending 12/27/25

	Gallons			Dollars			Price per EQ Gallon		
	4 Weeks YA	4 Weeks	% Chg	4 Weeks YA	4 Weeks	% Chg	4 Weeks YA	4 Weeks	% Chg
TL GJ	775,178	703,963	-9.19%	$8,841,240	$8,791,867	-0.56%	$11.41	$12.49	9.50%
TL GJ REF NFC	541,429	433,697	-19.90%	$6,355,723	$5,557,045	-12.57%	$11.74	$12.81	9.15%
TL GJ REF RECON	29,319	57,797	97.13%	$656,615	$1,290,108	96.48%	$22.40	$22.32	-0.33%
TL GJ FRZ	544	2,715	399.04%	$3,582	$20,305	466.81%	$6.58	$7.48	13.58%
TL GJ SHELF STABLE	203,886	209,754	2.88%	$1,825,320	$1,924,407	5.43%	$8.95	$9.17	2.48%

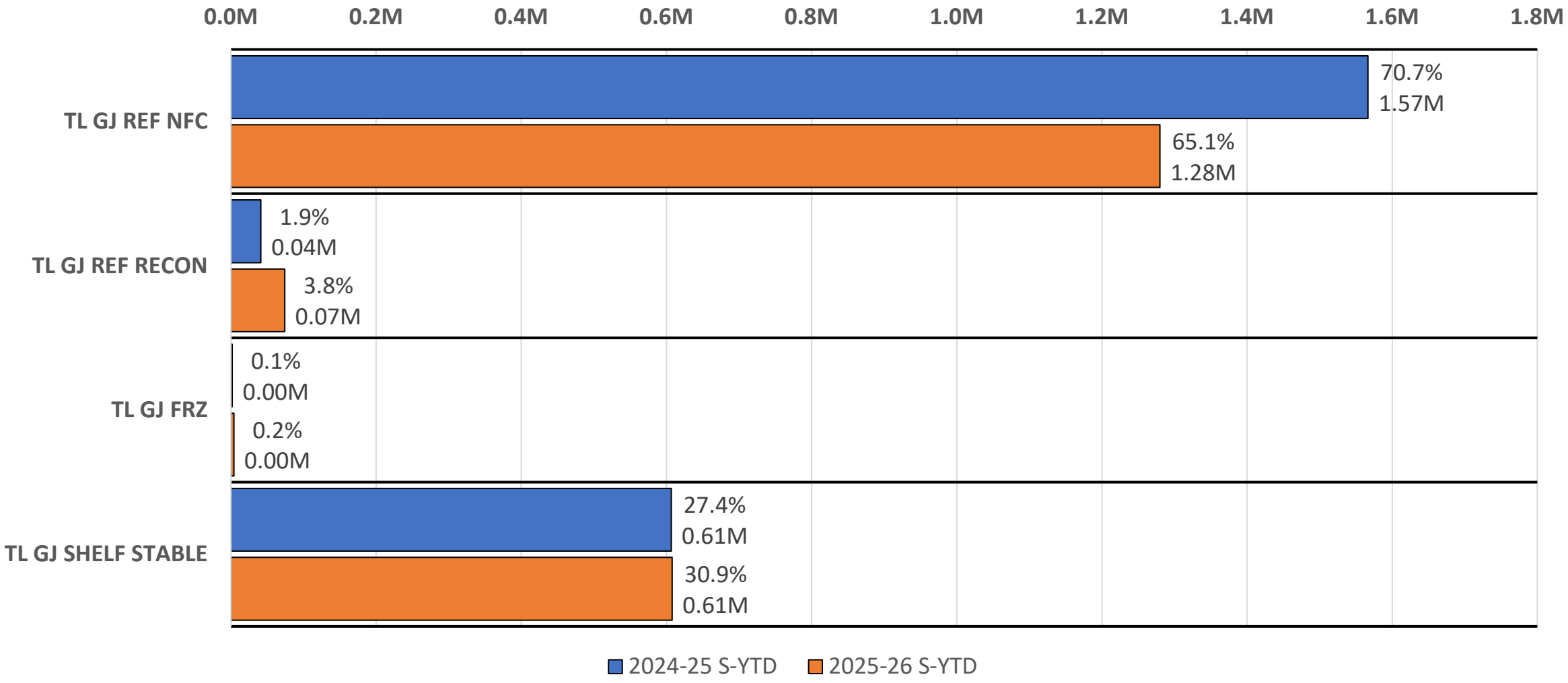
Total GJ - SYTD

TOTAL US - XAOC

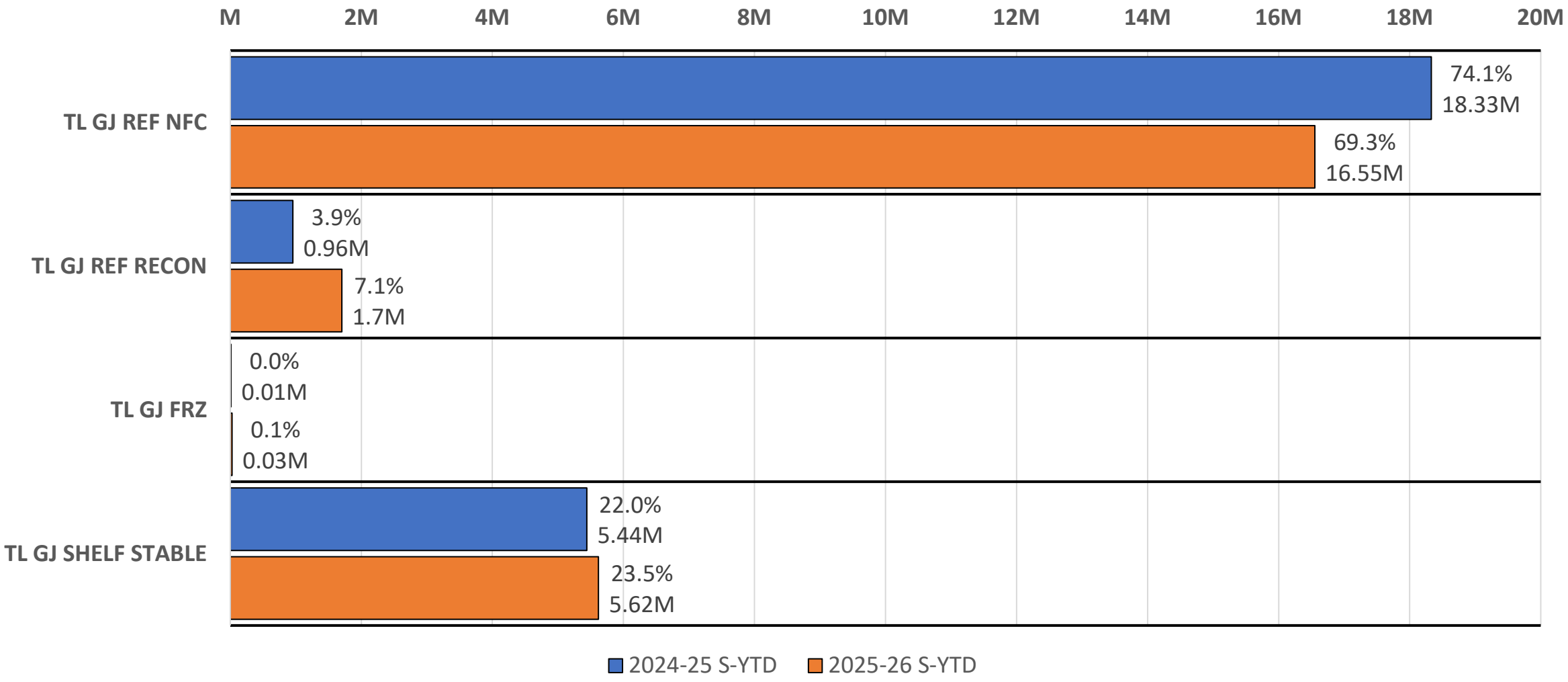
Season Year to Date

	Gallons			Dollars			Price per EQ Gallon		
	2024-25	2025-26	% Chg	2024-25	2025-26	% Chg	2024-25	2025-26	% Chg
TL GJ	2,216,067	1,965,710	-11.30%	$24,738,157	$23,902,855	-3.38%	$11.16	$12.16	8.93%
TL GJ REF NFC	1,566,700	1,279,936	-18.30%	$18,330,507	$16,553,287	-9.70%	$11.70	$12.93	10.54%
TL GJ REF RECON	41,127	74,025	79.99%	$956,238	$1,702,625	78.05%	$23.25	$23.00	-1.08%
TL GJ FRZ	1,708	3,901	128.44%	$11,237	$28,116	150.20%	$6.58	$7.21	9.53%
TL GJ SHELF STABLE	606,533	607,847	0.22%	$5,440,175	$5,618,827	3.28%	$8.97	$9.24	3.06%

GJ Volume Share by Product



GJ Dollar Share by Product



GJ Percent ACV Distribution

Total GJ% ACV Distribution

- Percentage of retail stores where product is available

% ACV (% Stores Selling)	2025-26*	2024-25	2023-24
NFC GJ	51.5	65.2	68.5
RECON GJ	4.2	1.9	2.3
FROZEN GJ	0.4	0.3	1.0
SHELF STABLE GJ	55.4	57.3	57.5
Total GJ	67.9	72.2	72.8

*Season YTD from
Nielsen IQ Discover

GJ Percent Change in TDP

% Chg in TDP	% Chg from 2024-25 to 2025-26*	% Chg from 2023-24 to 2024-25	% Chg from 2022-23 to 2023-24
NFC GJ	-19.5%	-7.9%	7.4%
RECON GJ	79.9%	4.1%	-45.1%
FROZEN GJ	60.0%	-70.9%	-91.8%
SS GJ	-5.3%	3.1%	7.8%
Total GJ	-11.9%	-3.2%	2.0%

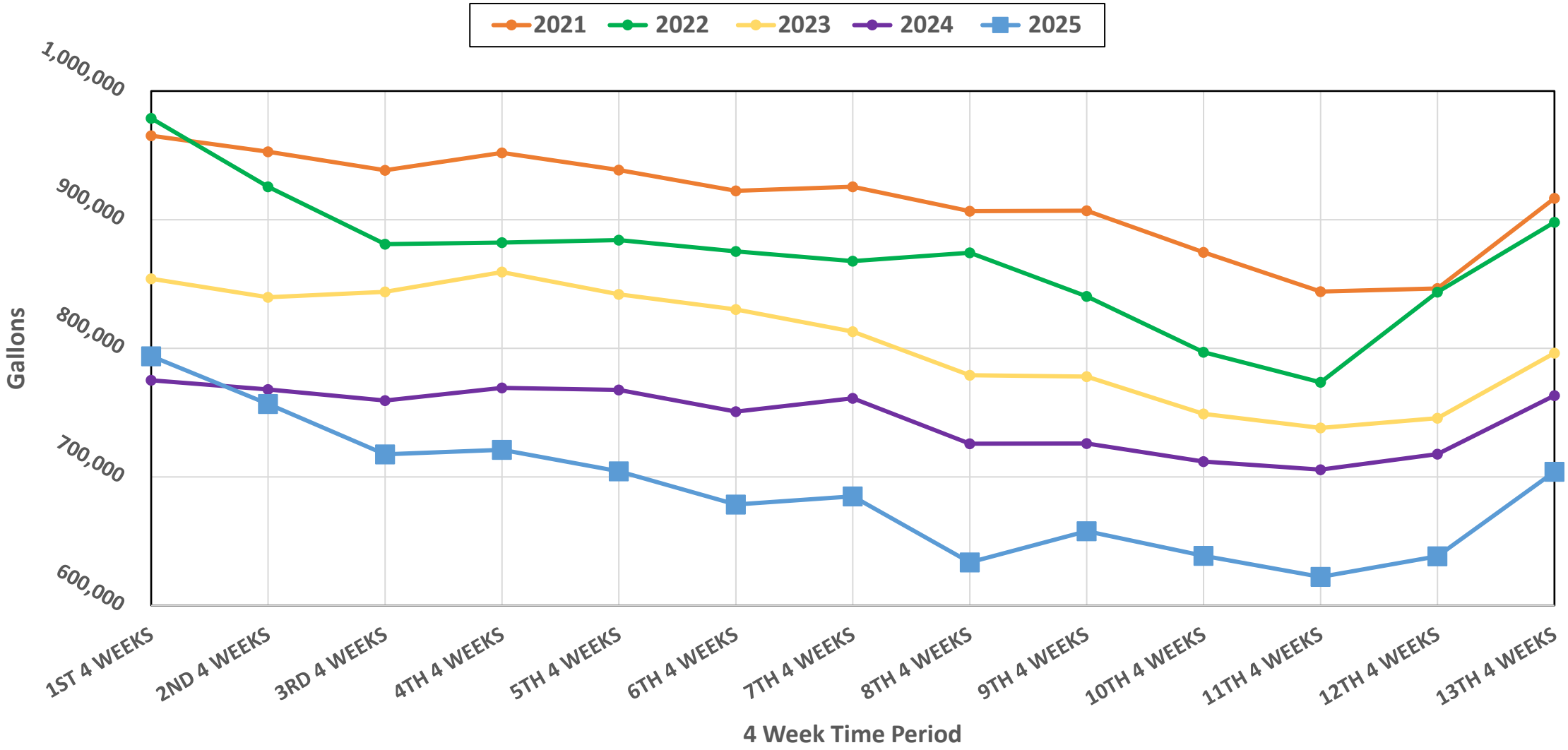
*Season YTD from Nielsen IQ Discover

GJ Average Number of Items per Store Percent Change

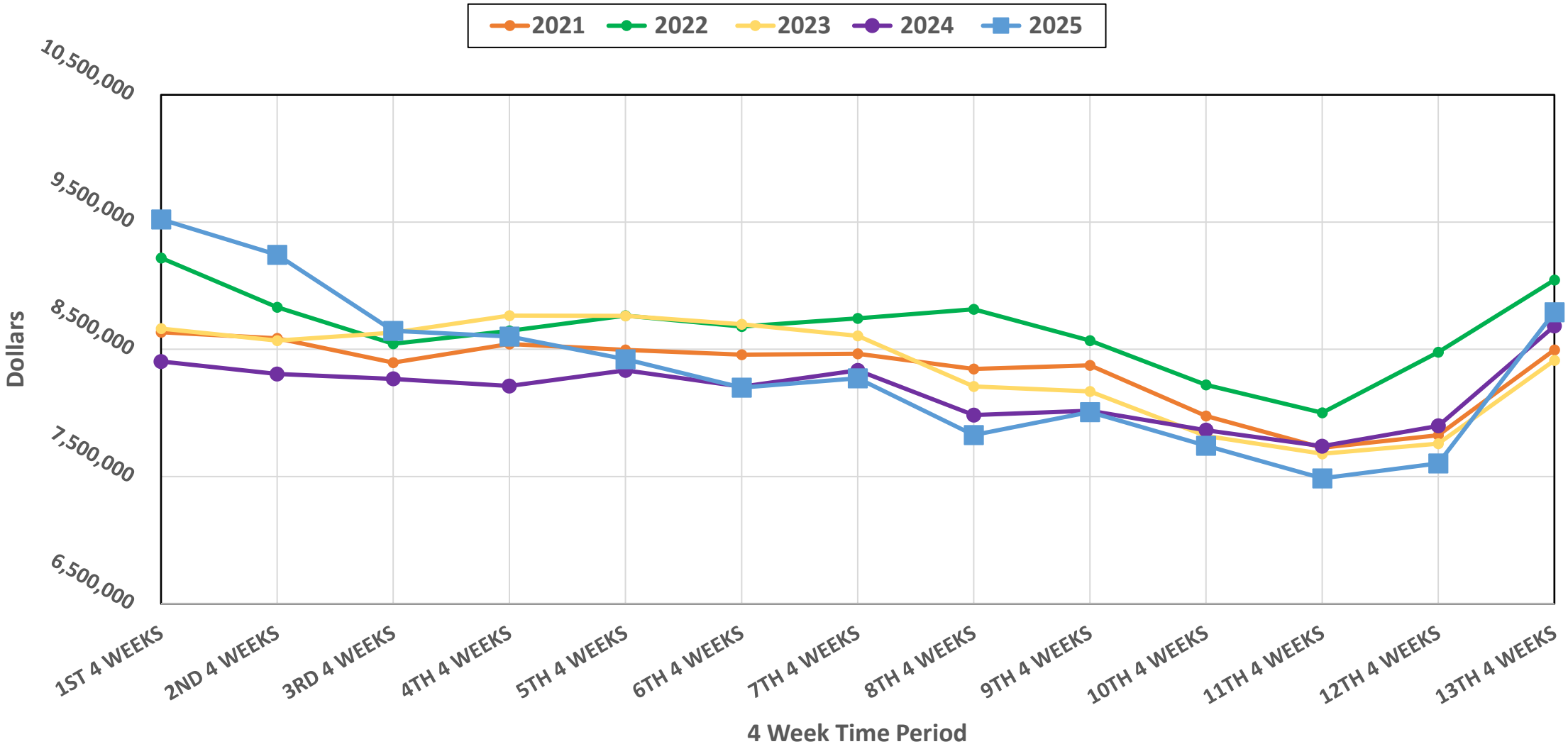
% Chg in Items per Store	% Chg from 2024-25 to 2025-26*	% Chg from 2023-24 to 2024-25	% Chg from 2022-23 to 2023-24
NFC GJ	1.9%	4.3%	9.5%
RECON GJ	-19.5%	-5.2%	22.2%
FROZEN GJ	0.0%	-0.7%	-44.1%
SS GJ	-2.0%	4.7%	7.4%
Total GJ	-6.3%	-0.6%	2.3%

*Season YTD from Nielsen IQ Discover

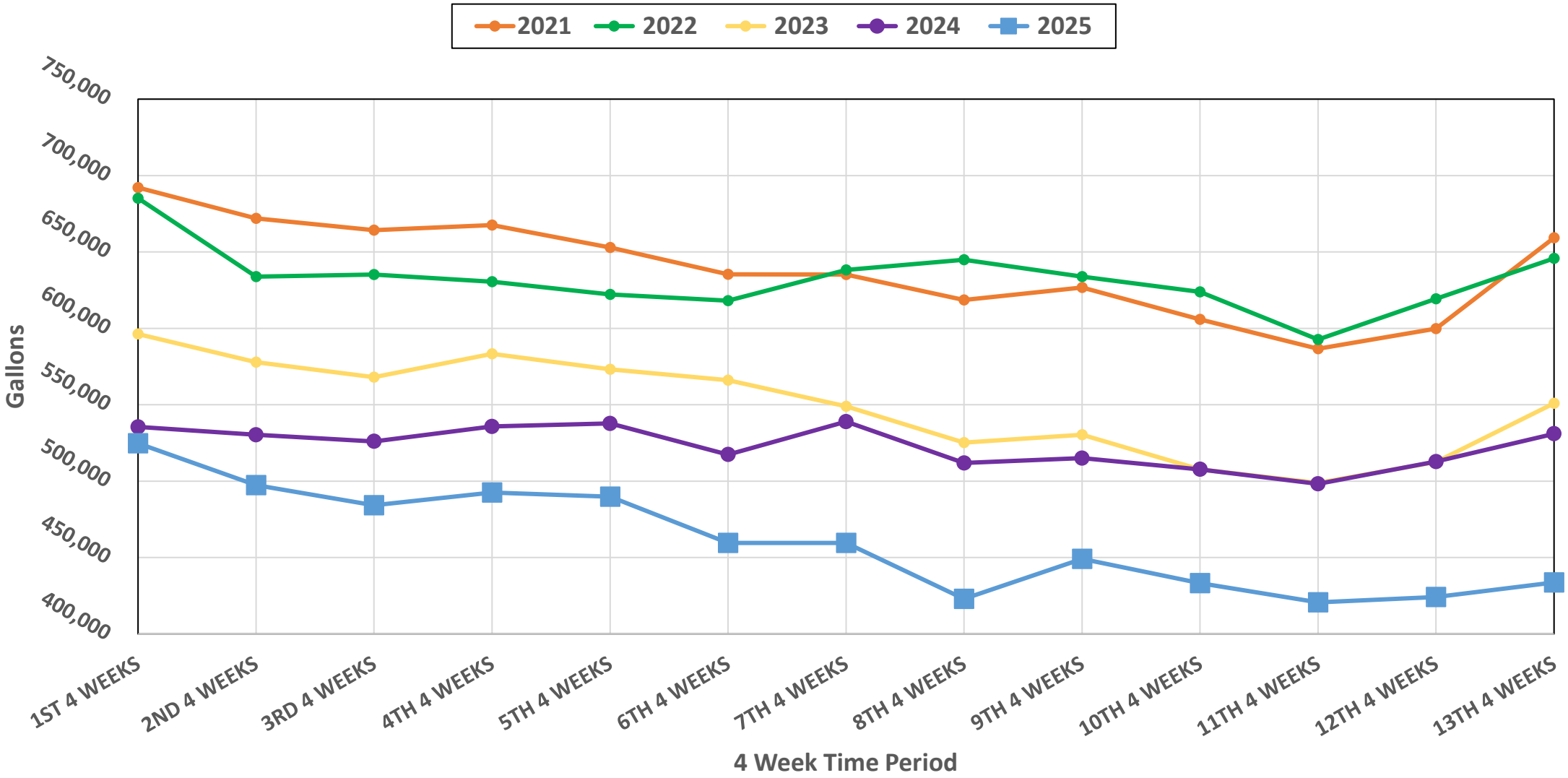
GJ Gallon Sales (Year-over-Year)



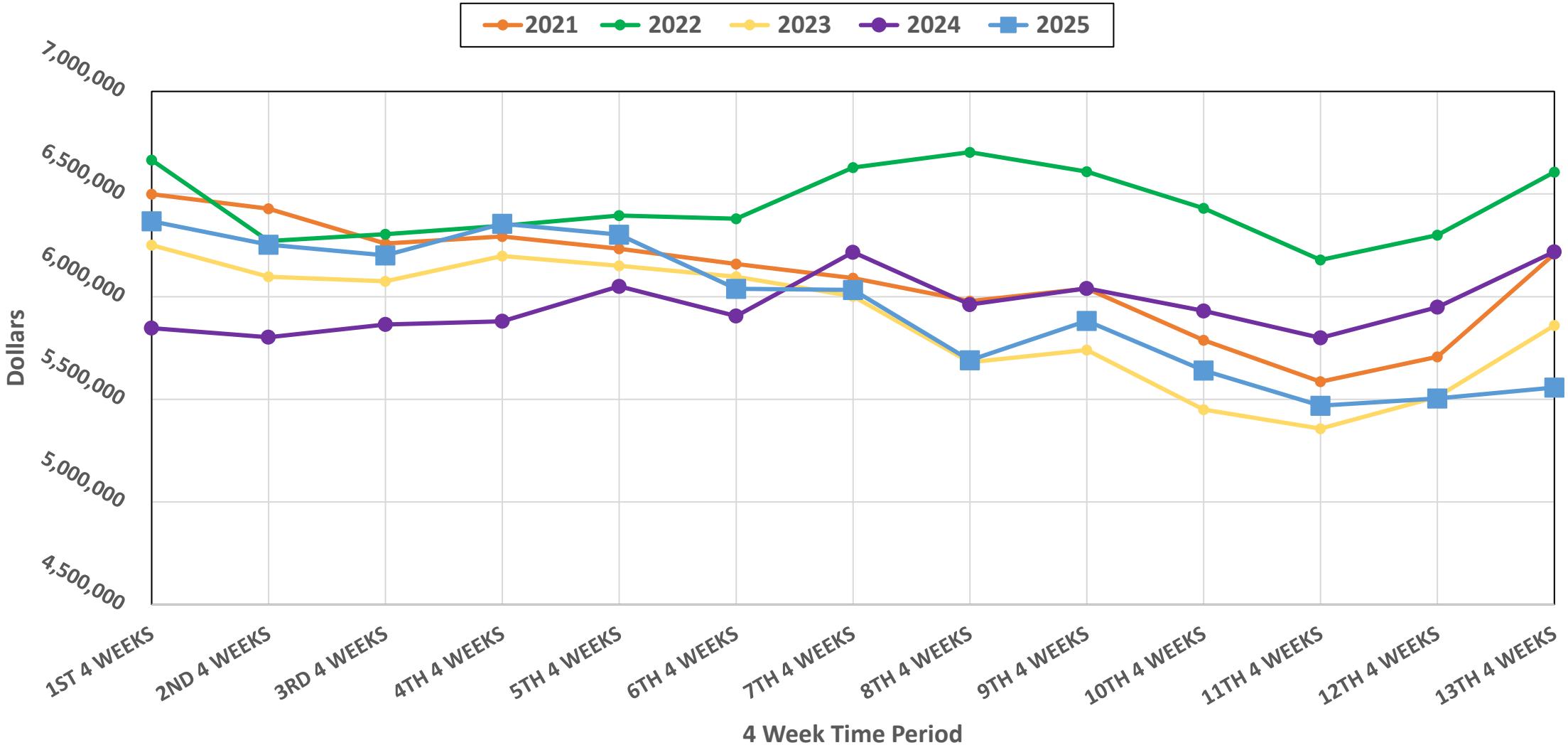
GJ Dollar Sales (Year-over-Year)



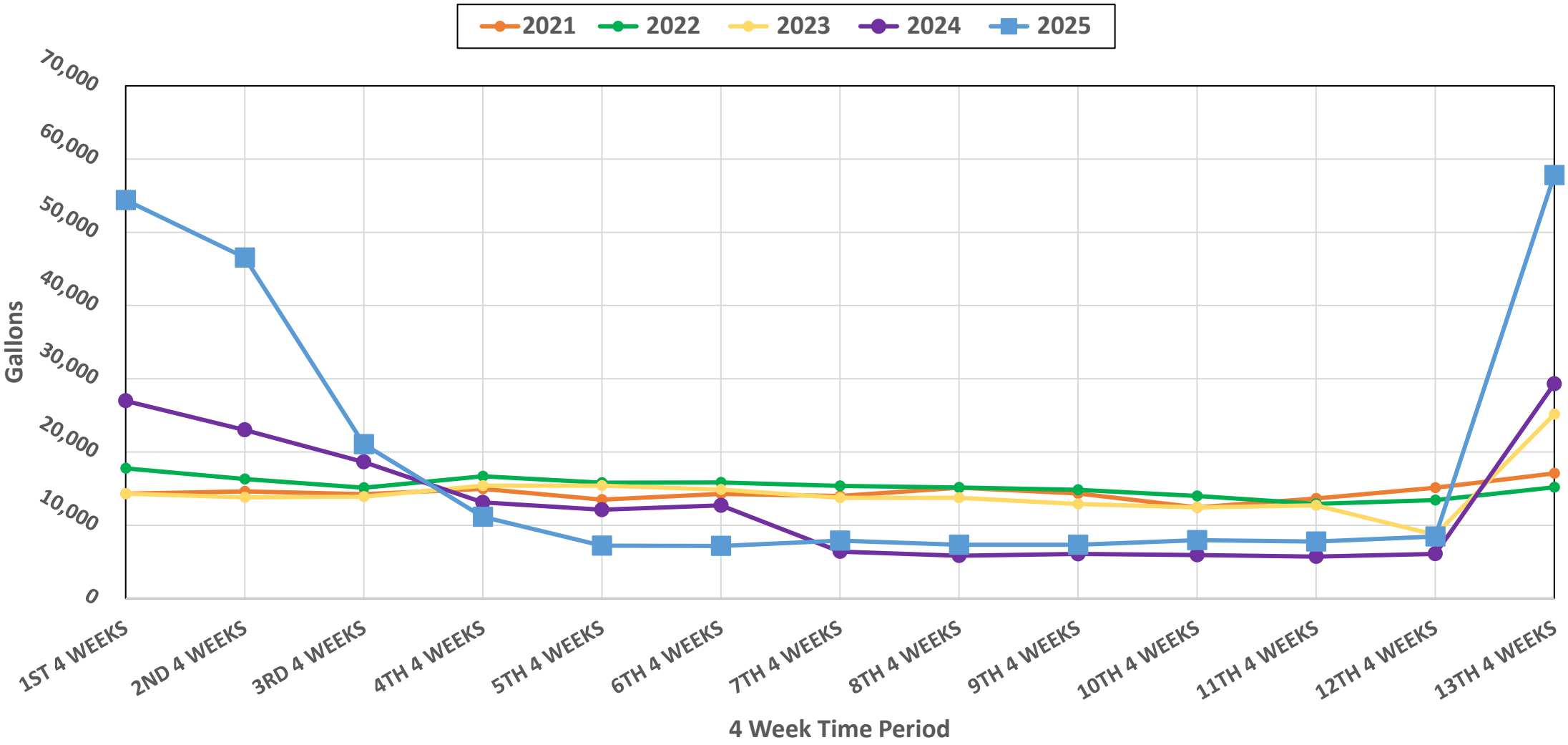
GJ REF NFC Gallon Sales (Year-over-Year)



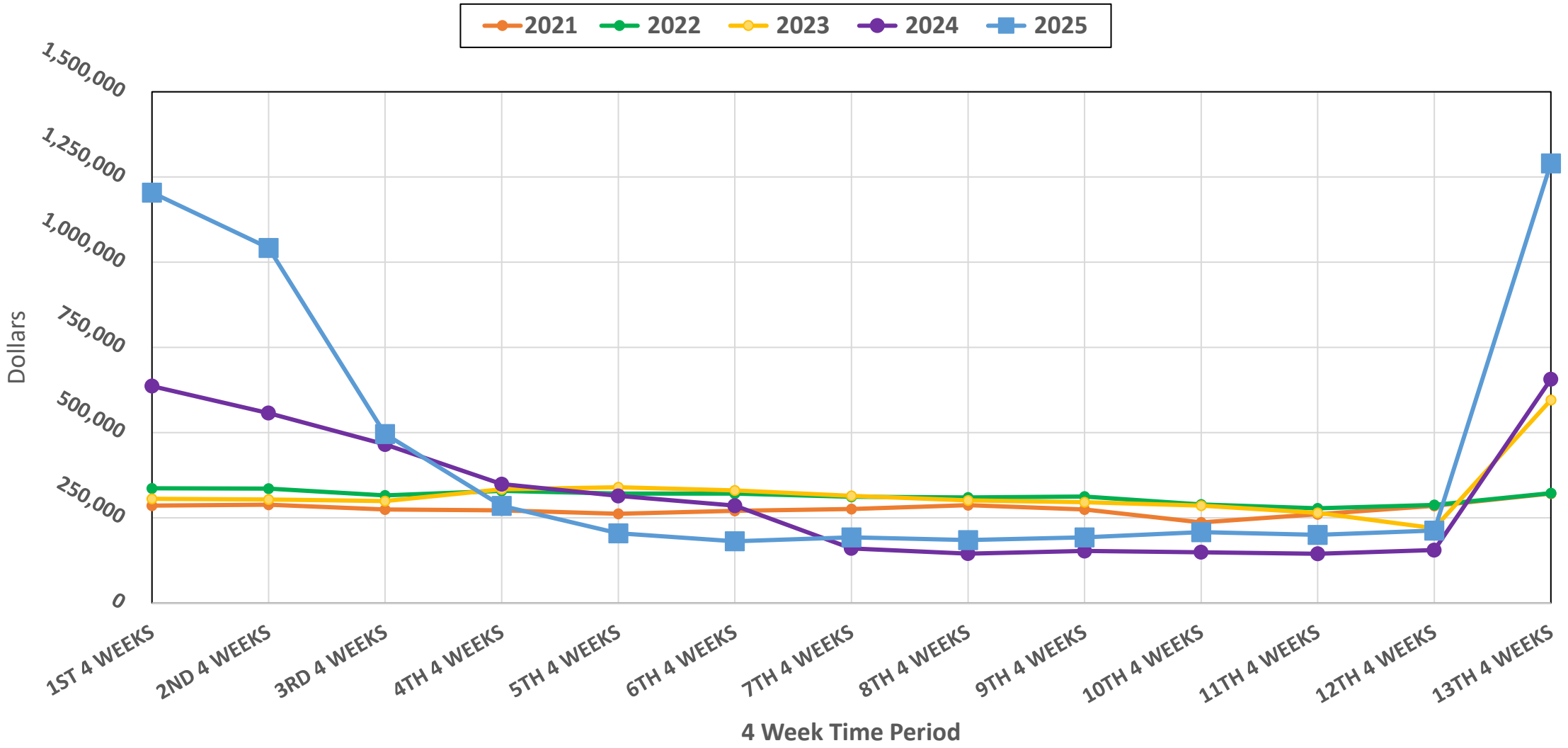
GJ REF NFC Dollar Sales (Year-over-Year)



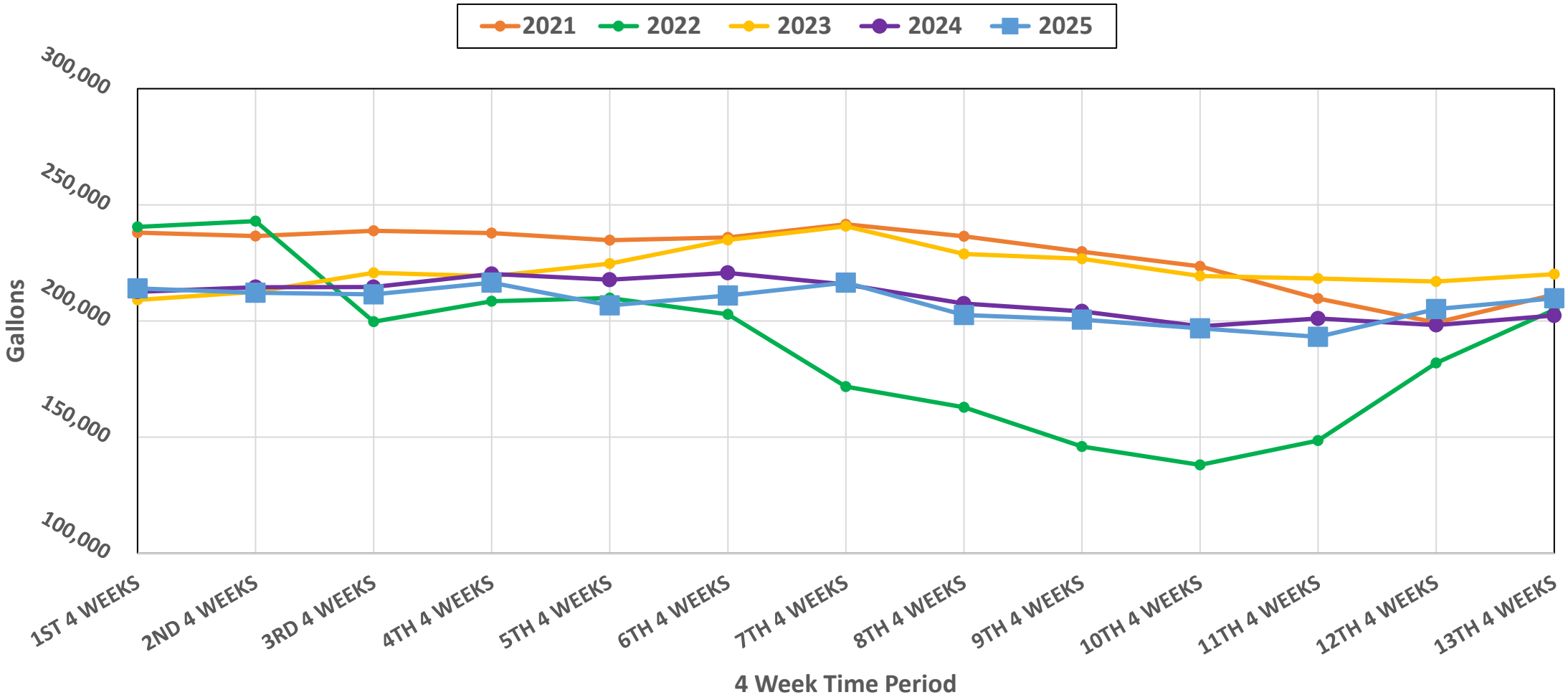
GJ REF RECON Gallon Sales (Year-over-Year)



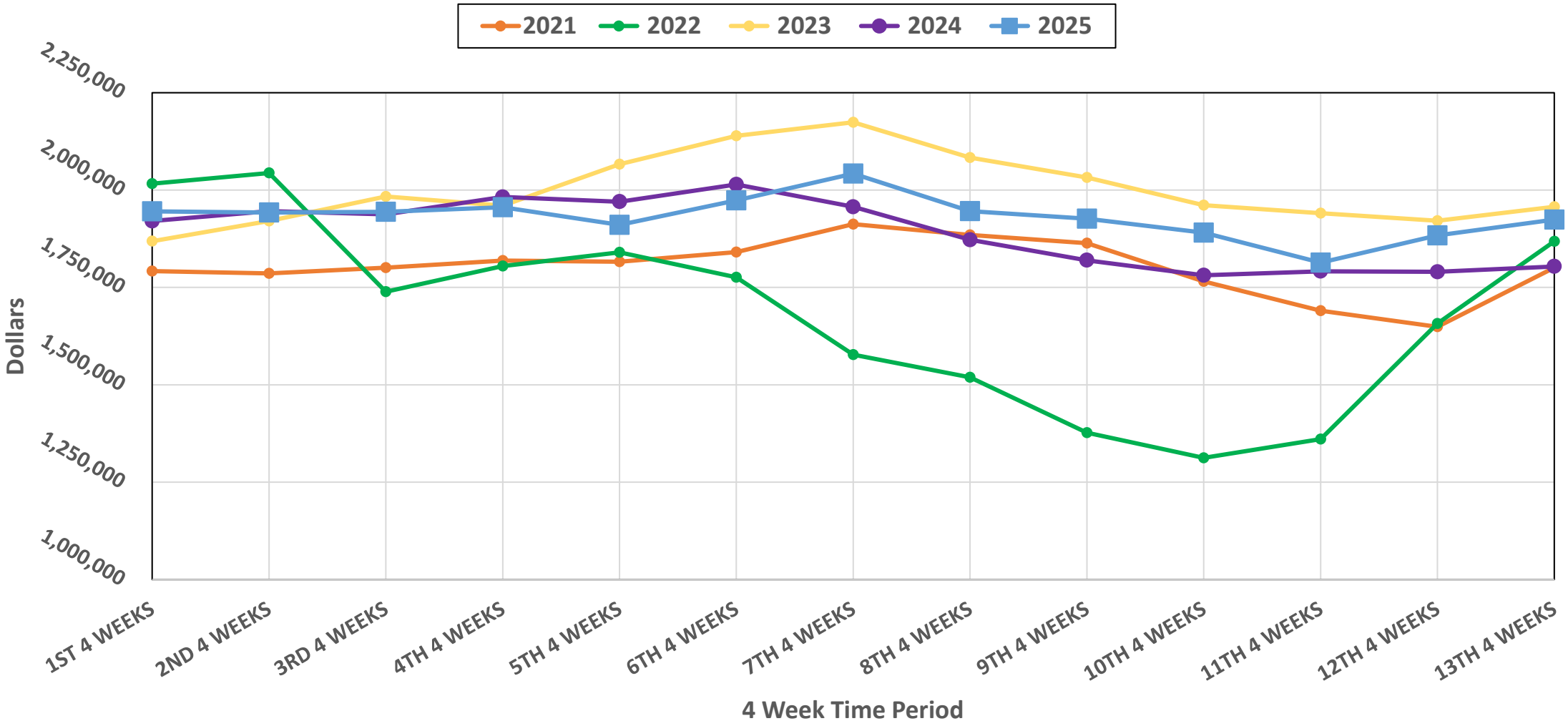
GJ REF RECON Dollar Sales (Year-over-Year)



GJ SHELF STABLE Gallon Sales (Year-over-Year)



GJ SHELF STABLE Dollar Sales (Year-over-Year)



Thank You

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