Economic & Market Research Committee Report

Presented to the
Florida Citrus Commission
January 21, 2026

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EMRD Agenda

- Orange Juice, Grapefruit Juice and Other Updates on Retail Sales Trends
- Florida Citrus Outlook – 2025/26 Season

Handouts

1. Nielsen Topline Report #3 of the 2025-26 Season
2. Nielsen Retail Sales Trends Report #3 of the 2025-26 Season
3. Economic Indicators – January 2026
4. Florida Citrus Outlook 2025-26 Season

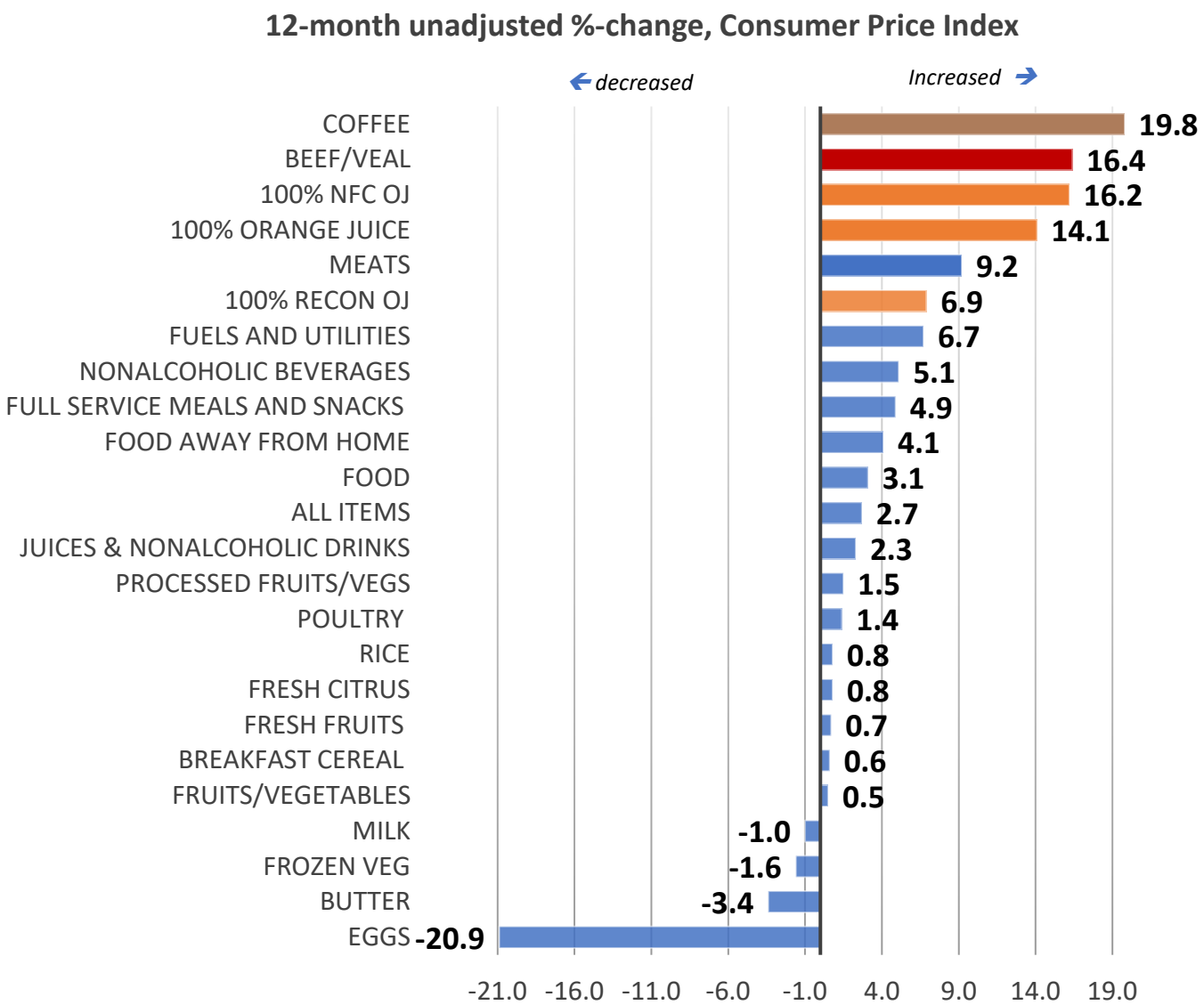
Agenda Item:

OJ/GJ Retail Sales Trends

Inflation

- Overall **Consumer Price Index** in December 2025 reveals a continued trend towards stabilizing (up by 2.7%) including food prices.

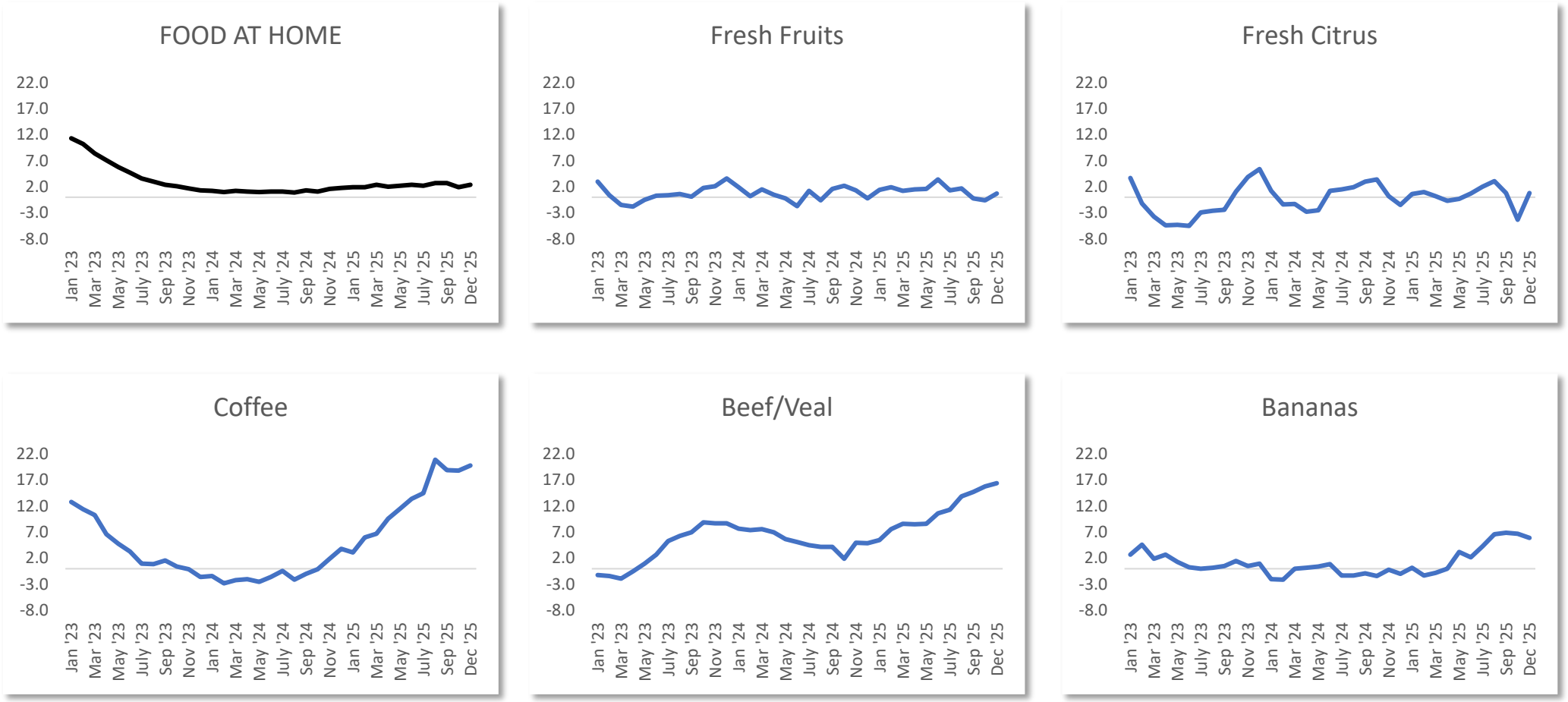
- Food prices are up by **3.1%**.
- Food at Home prices up by **2.4%.**
- Food Away from Home prices up **4.1%.**
- Juices and non-alcoholic drinks up **2.3%.**



For more info: https://www.bls.gov/news.release/cpi.nr0.htm

Not all Demand Responses the Same

12-month unadjusted %-change, Consumer Price Index



For more info: https://www.bls.gov/news.release/cpi.nr0.htm

Example of Current Consumer Retail Response:

Fresh Meat sales nearly $77 Billion through 7/13/2025

Retail Fresh Meat Sales, YTD ending 7/13/2025

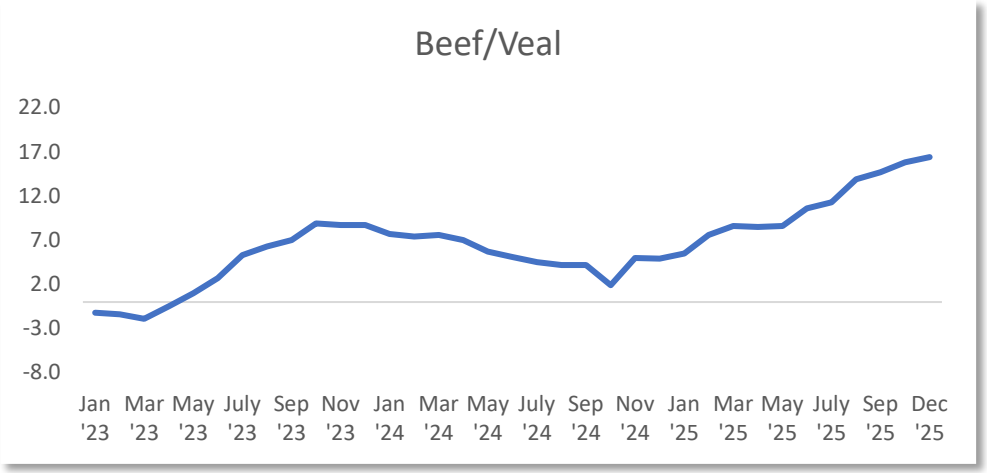
+8.9%

$ sales growth

+4.1%

Lbs. sales growth

12-month unadjusted %-change, Consumer Price Index



	$ YTD Ending 7/13 v. YAGO	LBS. YTD Ending 7/13 v. YAGO
	+12.5% $43B v. $38.2B	+6.3% 6.2B v. 5.8B lbs.
	+6.2% $20.3B v. $19B	+3.2% 6.5B v. 6.3B lbs.
	+3.7% $8.6B v. $8.3B	2.4% 2.68B v. 2.62B lbs.
	-14.6% $286M v. $335M	-14.6% 35.3M v. 41.3M lbs.

FIGURE 3.

FRESH MEAT RETAIL SALES, JANUARY – JULY 13, 2025

Source: Circana, Fresh Beef Sales by Volume and Value, Data Ending 7/13/2025

For more info: https://www.beefresearch.org/

Orange Juice at Retail – 4-wks through 12/27/25

Total US - xAOC	Gallons			Dollars			Price per EQ Gallon		
4-Wks Ending 12/27/25	4-Weeks YAGO	4-Weeks	% Chg	4-Weeks YAGO	4-Weeks	% Chg	4-Weeks YAGO	4-Weeks	% Chg
TL OJ	27.92 M	25.02 M	-10.39%	$280.41 M	$286.64 M	2.22%	$10.04	$11.46	14.07%
TL OJ REF NFC	19.01 M	17.46 M	-8.16%	$200.50 M	$213.94 M	6.70%	$10.55	$12.25	16.18%
NFC <11oz	0.27 M	0.27 M	-2.42%	$05.21 M	$05.35 M	2.83%	$19.03	$20.05	5.38%
NFC 11-20oz	0.33 M	0.34 M	3.64%	$07.95 M	$08.67 M	9.11%	$24.32	$25.60	5.27%
NFC 20-40oz	0.17 M	0.12 M	-27.67%	$03.51 M	$03.15 M	-10.42%	$20.93	$25.92	23.84%
NFC 40-70oz	13.43 M	11.66 M	-13.19%	$134.42 M	$136.95 M	1.88%	$10.01	$11.74	17.36%
NFC 70-110oz	4.02 M	4.46 M	10.97%	$42.41 M	$53.54 M	26.25%	$10.56	$12.02	13.78%
NFC >110oz	0.79 M	0.62 M	-22.45%	$07.00 M	$06.27 M	-10.42%	$8.81	$10.18	15.52%
TL OJ REF RECON	7.34 M	6.35 M	-13.50%	$65.65 M	$60.73 M	-7.50%	$8.94	$9.56	6.94%
TL GJ	0.78 M	0.70 M	-9.19%	$08.84 M	$08.79 M	-0.56%	$11.41	$12.49	9.50%

Data Source: FDOC Custom Database Nielsen. xAOC = Expanded All Outlets Combined.

Orange Juice at Retail – Season-YTD through 12/27/25

Total US - xAOC	Gallons			Dollars			Price per EQ Gallon		
Season-YTD through 12/27/25	S-YTD 2024-25	S-YTD 2025-26	% Chg	S-YTD 2024-25	S-YTD 2025-26	% Chg	S-YTD 2024-25	S-YTD 2025-26	% Chg
TL OJ	75.15 M	66.73 M	-11.20%	$749.03 M	$768.96 M	2.66%	$9.97	$11.52	15.61%
TL OJ REF NFC	49.74 M	45.55 M	-8.42%	$525.63 M	$566.53 M	7.78%	$10.57	$12.44	17.69%
NFC <11oz	0.81 M	0.78 M	-4.14%	$15.28 M	$15.61 M	2.22%	$18.75	$19.99	6.63%
NFC 11-20oz	0.97 M	0.97 M	-0.32%	$23.14 M	$24.91 M	7.62%	$23.76	$25.65	7.97%
NFC 20-40oz	0.50 M	0.39 M	-22.83%	$10.10 M	$09.66 M	-4.43%	$20.23	$25.06	23.84%
NFC 40-70oz	35.07 M	30.08 M	-14.24%	$353.74 M	$359.26 M	1.56%	$10.09	$11.94	18.43%
NFC 70-110oz	10.08 M	11.63 M	15.34%	$103.86 M	$139.86 M	34.66%	$10.30	$12.02	16.75%
NFC >110oz	2.29 M	1.70 M	-25.71%	$19.51 M	$17.23 M	-11.65%	$8.51	$10.12	18.92%
TL OJ REF RECON	21.09 M	17.83 M	-15.47%	$184.27 M	$169.49 M	-8.02%	$8.74	$9.51	8.81%
TL GJ	2.22 M	1.97 M	-11.30%	$24.74 M	$23.90 M	-3.38%	$11.16	$12.16	8.93%

Data Source: FDOC Custom Database Nielsen. xAOC = Expanded All Outlets Combined.

OJ Blends and Drinks

Florida Department of Citrus, Economic and Market Research Department.
Retail Sales Trends: Report #3 of the 2025-26 Season, released 1/9/2026,
pp 44-52.

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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. * *Note: May include 100% orange juice from single or blended origins.*
- 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%

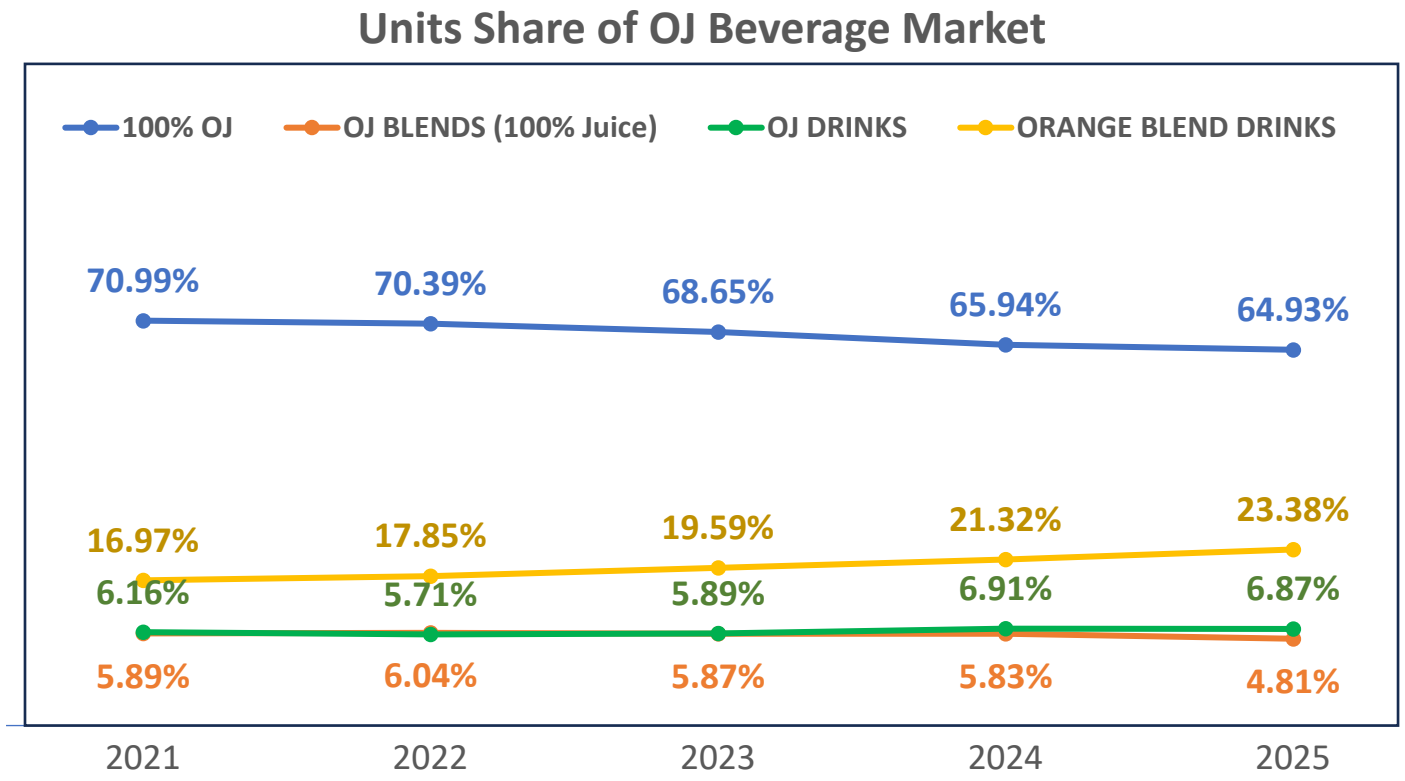
Total OJ Blends and Drinks - SYTD

TOTAL US - XAOC

Season Year to Date

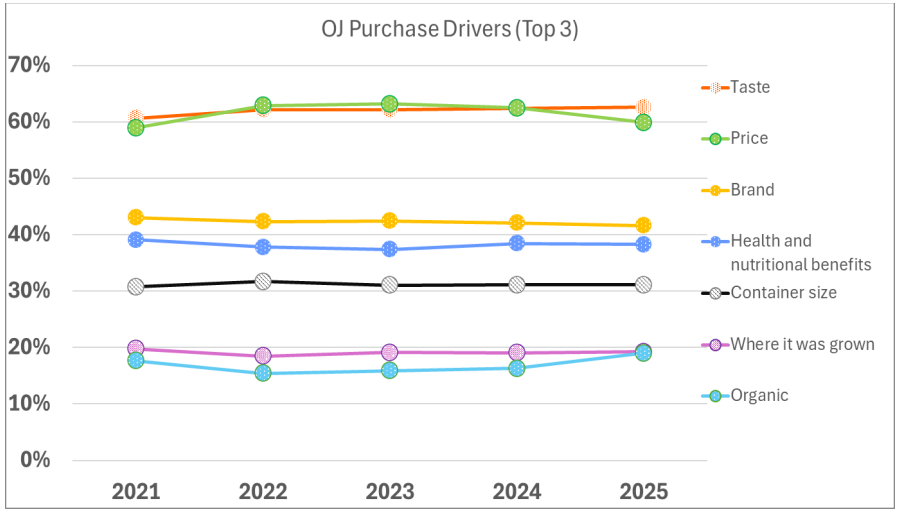
	Gallons			Dollars			Price per EQ Gallon		
	2024-25	2025-26	% Chg	2024-25	2025-26	% Chg	2024-25	2025-26	% Chg
TL OJ (100% OJ)	75,146,745	66,730,495	-11.20%	$749,025,974	$768,959,622	2.66%	$9.97	$11.52	15.61%
TL of All OJ Blends/ Drinks	45,888,649	42,207,985	-8.02%	$291,205,017	$280,014,262	-3.84%	$6.35	$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%

100% OJ Share of OJ Category



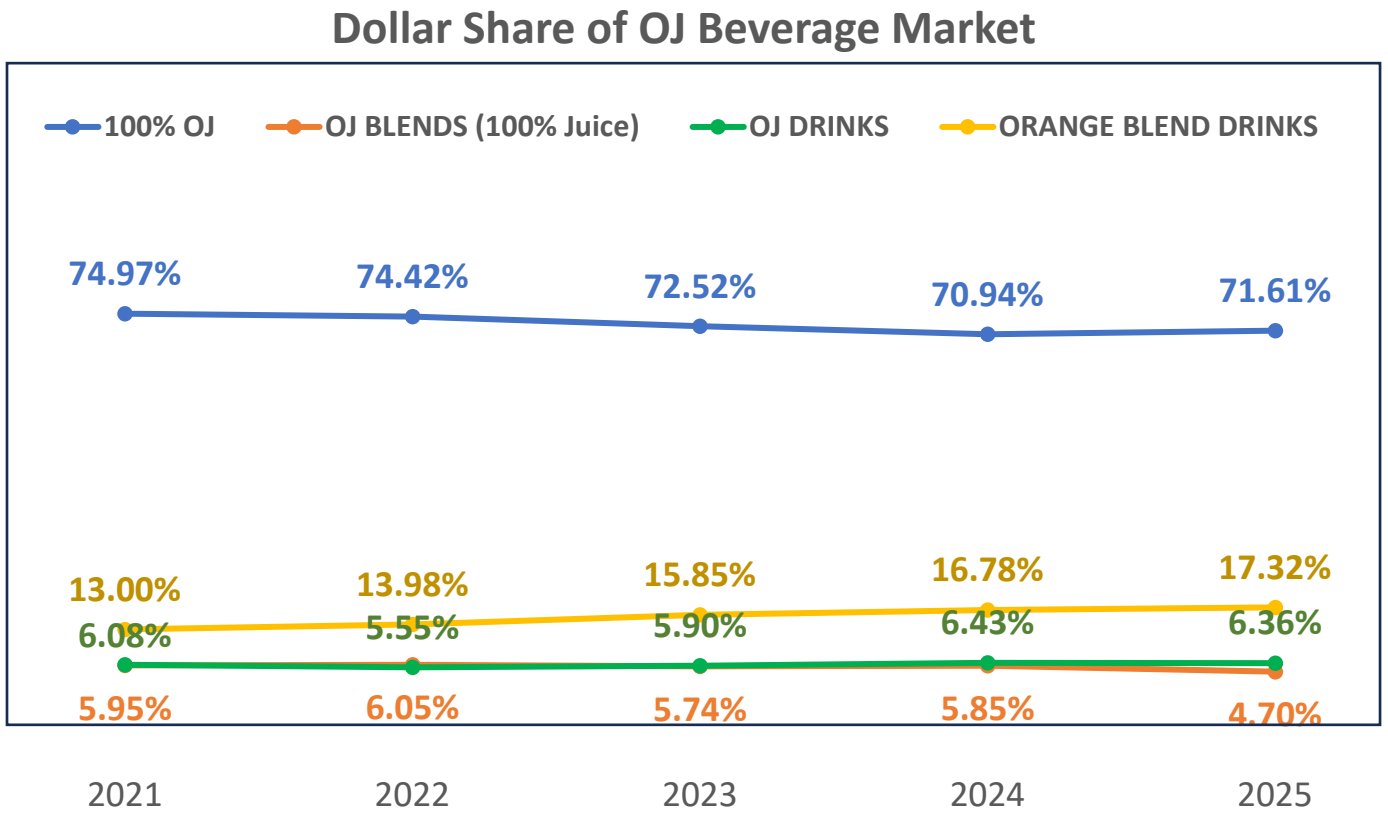
Average Consumer Shelf Price

xAOC - Avg. Unit $	2021	2022	2023	2024	2025
100% OJ	$3.55	$3.84	$4.19	$4.45	$5.03
OJ BLEND (100% Juice)	$3.39	$3.63	$3.88	$4.15	$4.46
OJ DRINKS	$3.32	$3.53	$3.97	$3.85	$4.22
ORANGE BLEND DRINKS	$2.58	$2.84	$3.21	$3.25	$3.38



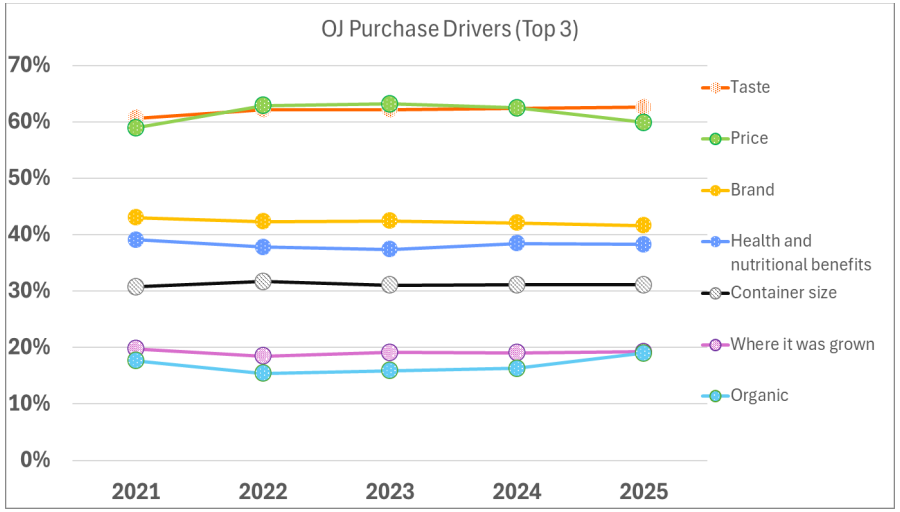
Data Source: FDOC Custom Database Nielsen. xAOC = Expanded All Outlets Combined.

100% OJ Share of OJ Category



Average Consumer Shelf Price

xAOC - Avg. Unit $	2021	2022	2023	2024	2025
100% OJ	$3.55	$3.84	$4.19	$4.45	$5.03
OJ BLEND (100% Juice)	$3.39	$3.63	$3.88	$4.15	$4.46
OJ DRINKS	$3.32	$3.53	$3.97	$3.85	$4.22
ORANGE BLEND DRINKS	$2.58	$2.84	$3.21	$3.25	$3.38



Data Source: FDOC Custom Database Nielsen. xAOC = Expanded All Outlets Combined.

Total OJ Blends and Drinks Percent Change in Total Distribution Points (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 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 Average Number of Items per Store Percent Change

- In terms of #UPCs

% 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

Upcoming Research & Consumer Insights

- Household Purchase Trends in the Beverage Category – March FCC
- OJ and GJ Retail Sales Trends and Consumer Awareness Updates – March FCC
- Fresh Citrus Consumer Awareness Updates – Dr. Lisa House



Agenda Item:

Florida Citrus

2025-26 Season Florida Citrus Outlook



Delayed Pending Forecast Florida Citrus Outlook 2025-26 Season

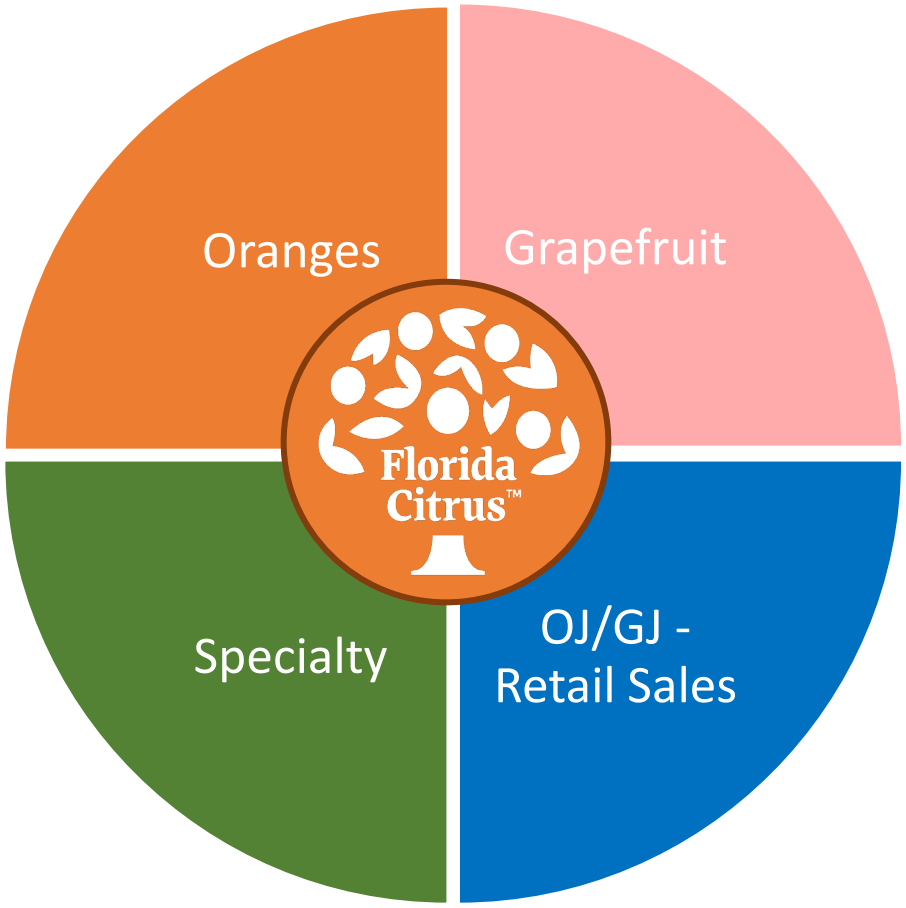
Available on-line at:

https://www.floridacitrus.org/grower/economic-market-resources/economic-reports/



Note: The *Florida Citrus Outlook* is based on the initial release of the USDA Citrus Forecast for the 2025-26 season (January 12, 2026).

Florida Citrus Outlook Report Structure



- World OJ Availability
- Florida Utilization and Movement
  - Florida Processed
  - Florida Fresh
- U.S. OJ/GJ Disappearance
- OJ/GJ - Retail Sales
- Certified Fresh Destinations

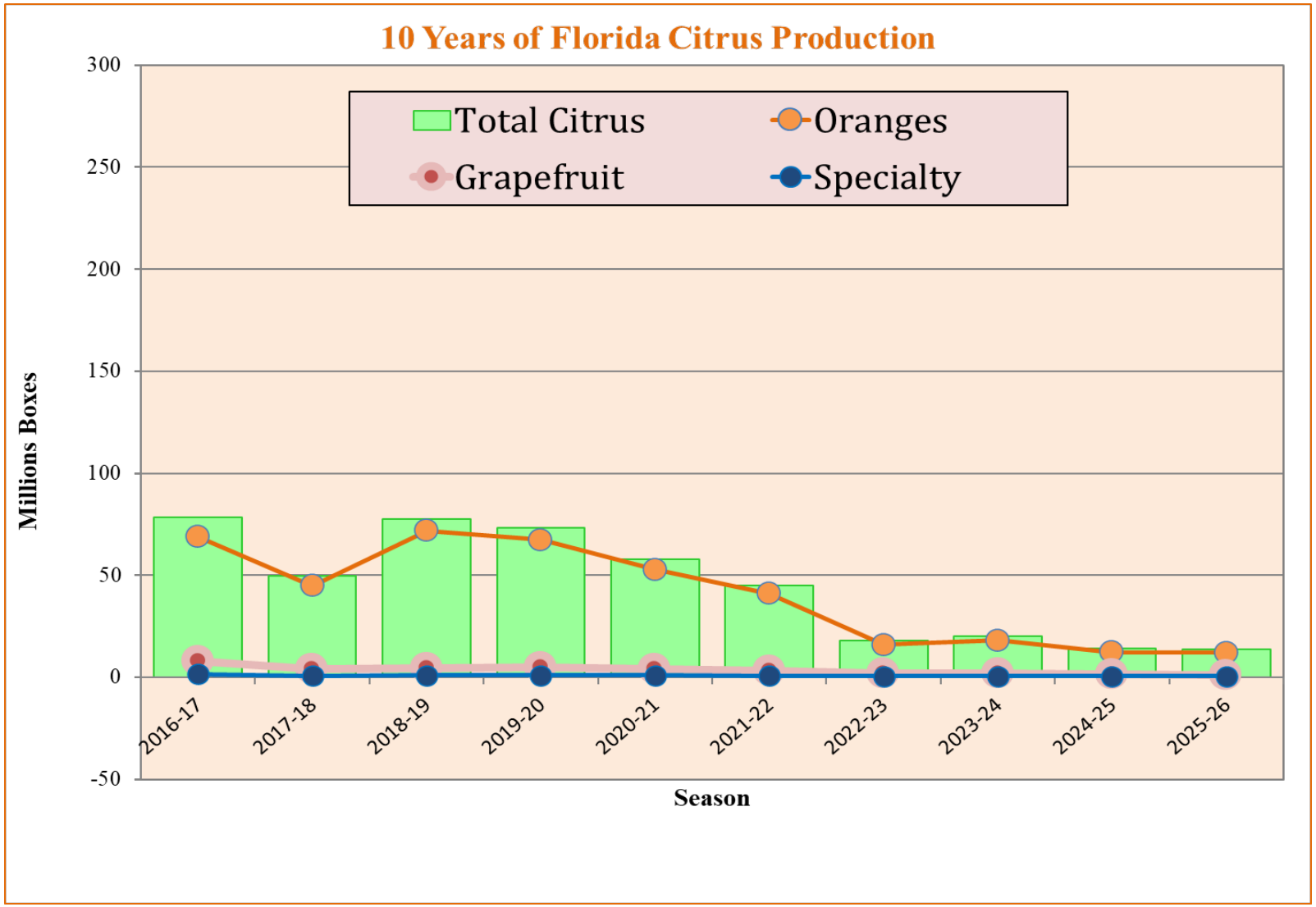
USDA Florida Citrus Crop Forecast – January 2026 (-2.2%)

13.6M Boxes

Oranges – 12M
Non-Valencia 4.5M
Valencia 7.5M

Grapefruit – 1.2M
Red – 1.1M
White – 100k

Specialty – 400k



Source: USDA

Florida Oranges

Florida Citrus Outlook 2025-26 Season

Florida Orange Utilization – October 2024

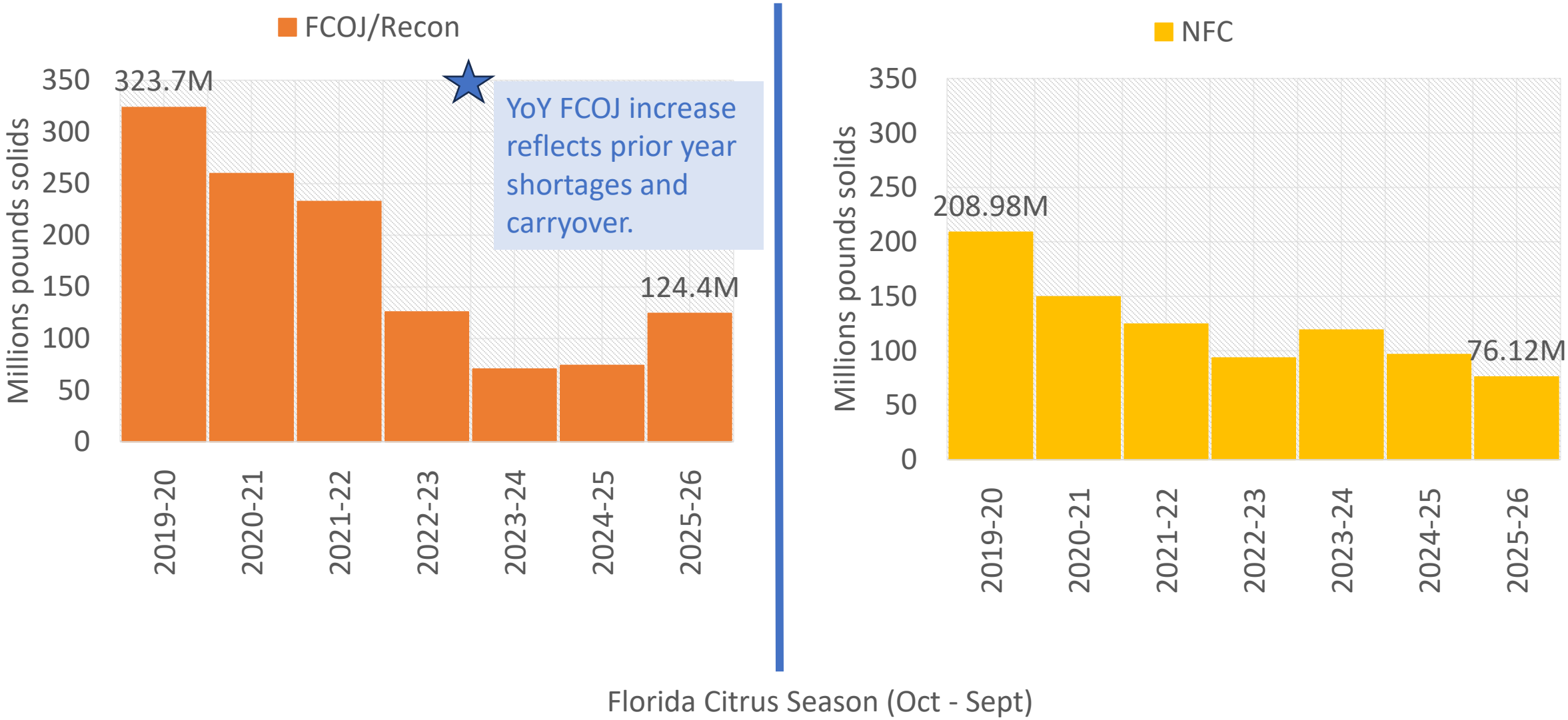
Segment	2021-22	2022-23	2023-24	20224-25p	2025-26p
	----------*million boxes*----------				
Fresh	2.45	1.49	1.69	1.00	**1.033**
FCOJ	4.19	1.35	3.46	3.85	**3.799**
SSOJ (NFC)	34.36	12.96	12.57	7.16	**7.093**
Non-Certified	0.15	0.12	0.07	0.075	**0.075**
Other	<0.001	<0.001	0.23	0.11	**<0.001**
TOTAL	41.05	15.80	17.96	12.20	**12.00**

Florida Processor OJ/GJ Availability*

- Beginning Inventory
- Pack from Fruit: production, juice yields
- Imports
- Movement (domestic, exports)
- Ending Inventory
- External Trends (weather-related events, etc.)

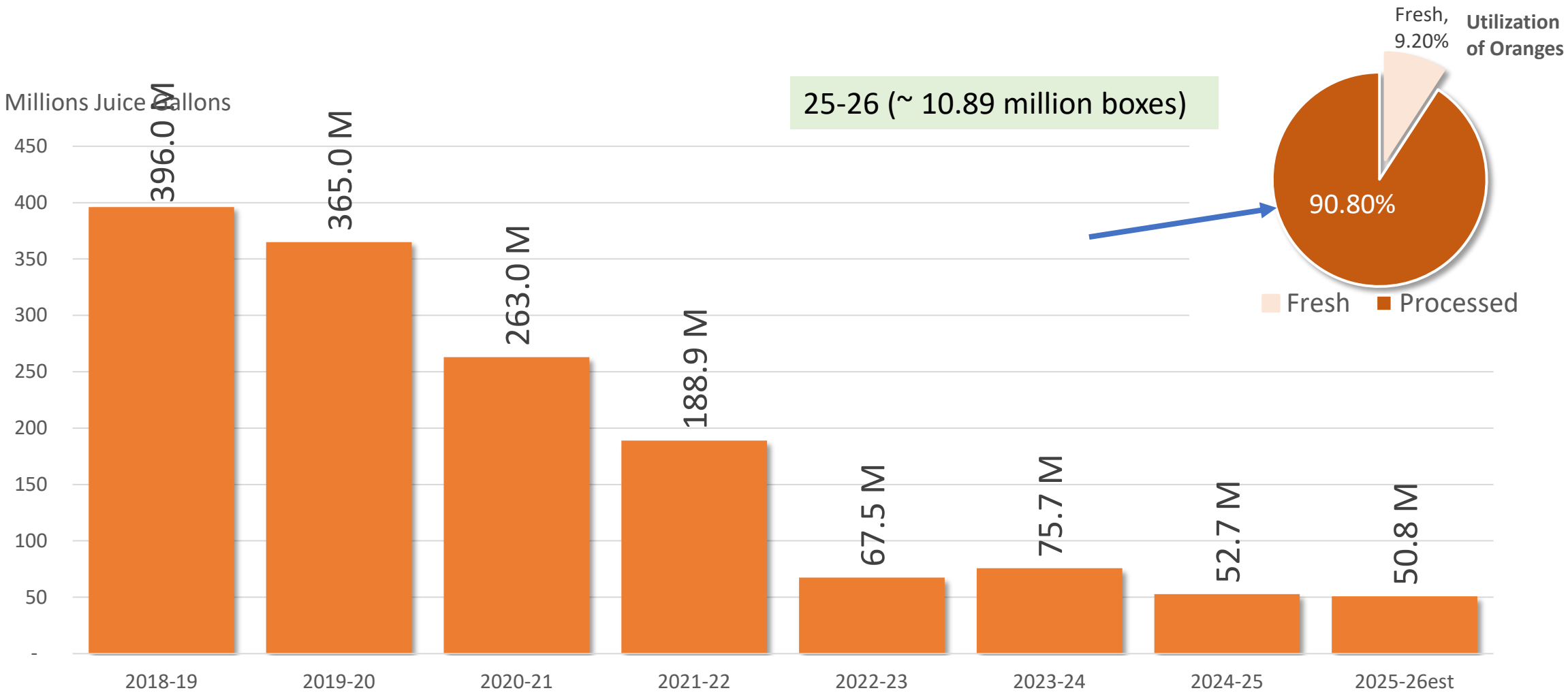
* Single-season availability does not determine import or movement patterns, which are partly influenced by multi-year inventory fluctuations and contracts.

OJ Beginning Inventory – Week 1 of Florida Citrus Season



Conversion: 1 single-strength equivalent gallon = 1.029 pounds solids

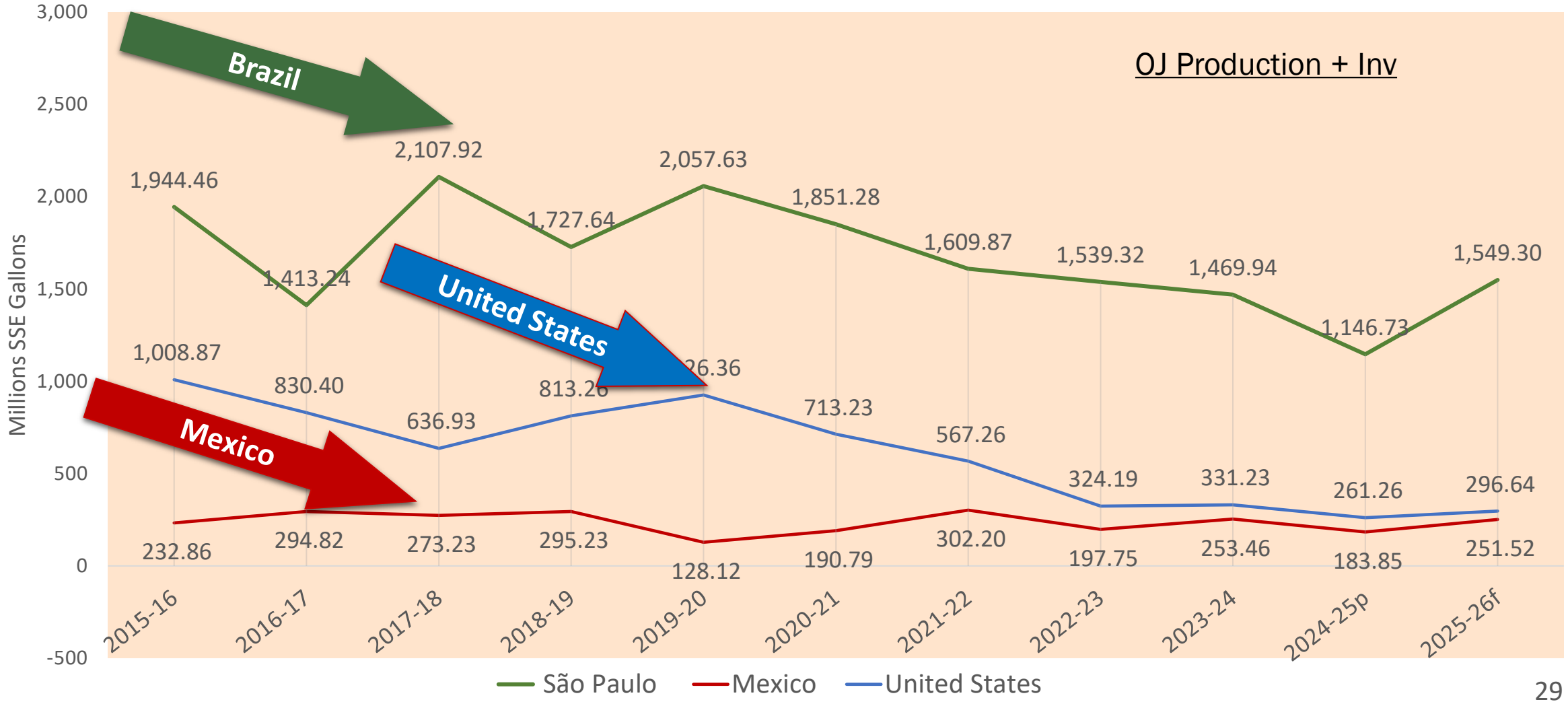
OJ Gallons produced from Florida-sourced oranges



Conversion: 1 single-strength equivalent gallon = 1.029 pounds solids

Leading OJ suppliers to US. market

Estimated Overall **availability** up by 31.76% with increased inv and Brazil prod



USMCA Now Leads Brazil OJ Exports

Brazil Orange Juice Exports

Destination		Season-to-date July - December 2022-23	2023-24	2024-25	2025-26	Change from 3 season average
		million SSE Gallons				%
USMCA[b]	Total	214.4	251.9	228.4	308.9	+33.4
	FCOJ	*110.9*	*119.6*	*89.4*	*121.1*	*+13.6*
	SSOJ (NFC)	*103.5*	*132.4*	*138.9*	*187.8*	*+50.3*
Europe[c]	Total	371.6	449.8	338.8	252.5	-34.7
	FCOJ	*281.6*	*334.6*	*239.9*	*175.5*	*-38.5*
	SSOJ (NFC)	*89.9*	*115.2*	*98.9*	*77.0*	*-24.0*
East Asia[d]	Total	57.8	75.4	47.7	24.4	-59.5
Others	Total	24.8	30.6	16.8	10.2	-57.6
Total		668.6	807.7	631.6	596.0	-15.2

[a]Assumes exports with codes 2009.11.00 (FCOJ) and 2009.19.00 (Other) are 66° Brix, while exports with code 2009.12.00 (NFC) are 11.8° Brix.

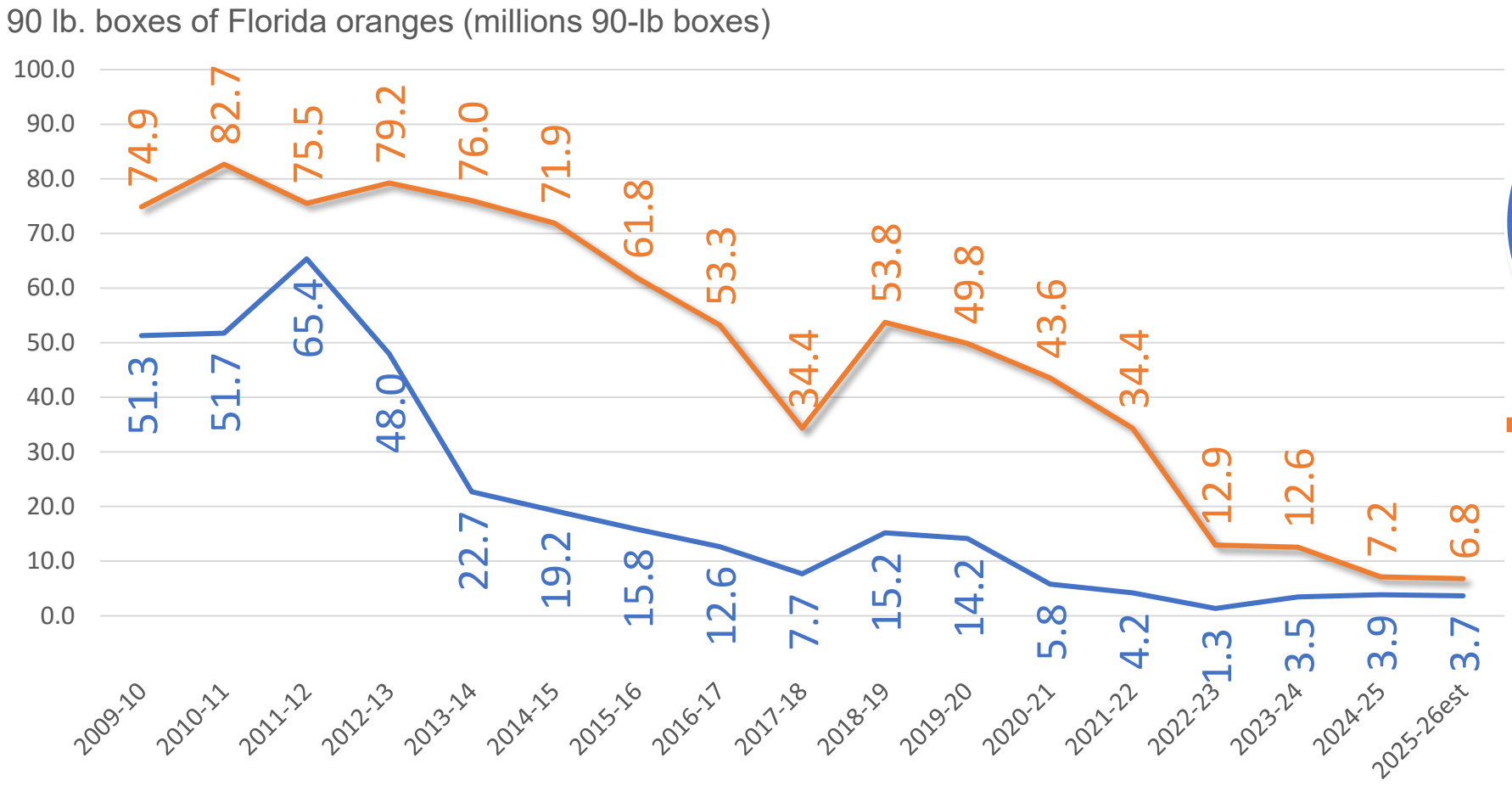
[b]U.S., Canada, and Mexico.

[c]Russia, Ukraine, and Turkey are included in Europe.

[d]China, Japan, Taiwan, Hong Kong, Macau, South Korea, North Korea, Philippines, and Vietnam.

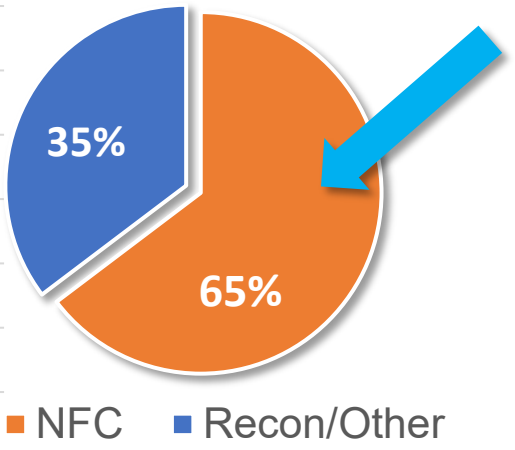
SOURCE: Secretary of External Commerce - Brazil

Florida expected to account for about 51% of domestically produced OJ in 2025-26



Utilization of Processed Oranges

2025-26f Season



NFC vs Recon Share by Season

%-Share	NFC	Recon/Other
18-19	77%	22%
21-22	89%	11%
22-23	90%	10%
23-24	78%	22%
24-25	65%	35%

Combined FL OJ Availability, Movement, and Inventory

Item	2023-24*	2024-25p	2025-26f
	million SSE gallons		
Beg. Inventory	184.1	165.7	**194.9**
Production	77.3	53.6	**50.9**
Imports/Domestic Receipts	415.3	424.8	**428.3**
Availability[a]	724.7	695.6	**710.4**
Movement	559.0	500.7	**436.9**
End. Inventory	165.7	194.9	**273.5**
	weeks supply		
Carryover	15.9	20.8	**32.5**

[A] **Avail includes reprocessed tangerine juice; net loss/gain during reprocessing; and other adjustments. *23-24 references revised processor data received in 2025**

Combined FL OJ - Import Scenarios

Item	2023-24	2024-25p	2025-26f		
			Imports <10%	Mid	Imports >10%
	- million 11.8° Brix gallons -				
Beginning Inventory	184.1	165.7		194.9	
Production	77.3	53.7		50.9	
Imports	415.3	424.8	385.5	428.3	471.2
Other Adjustments	48.0	51.4		36.3	
Availability	724.7	695.6	667.6	710.4	753.2
Total Movement	559.0	500.7		437.0	
Domestic Move	535.7	486.0		436.9	
Export Move	7.6	0.6		0.1	
Ending Inventory	165.7	194.9	230.63	273.5	316.29
	- weeks supply -			- weeks supply -	
Carryover	15.9	20.8	27.4	32.5	37.6

[A] Avail includes reprocessed tangerine juice; net loss/gain during reprocessing; and other adjustments. *23-24 references revised processor data received in 2025

U.S. OJ Supply & Domestic Use

Season	Beginning Inventory	Other U.S. Production	U.S. Imports	U.S. Exports	Ending Inventory	Disappearance
	- - - - - - - - - - million SSE gallons - - - - - - - - - -					
2021-22	371.9	219.2	440.6	42.2	234.9	754.6
2022-23	234.9	110.0	567.8	32.4	203.6	676.7
2023-24	203.6	145.2	553.7	35.9	186.9	679.6
2024-25p	186.9	94.4	535.0	38.3	213.7	564.3
2025-26f	213.7	101.3	558.9	29.3	290.0	554.6

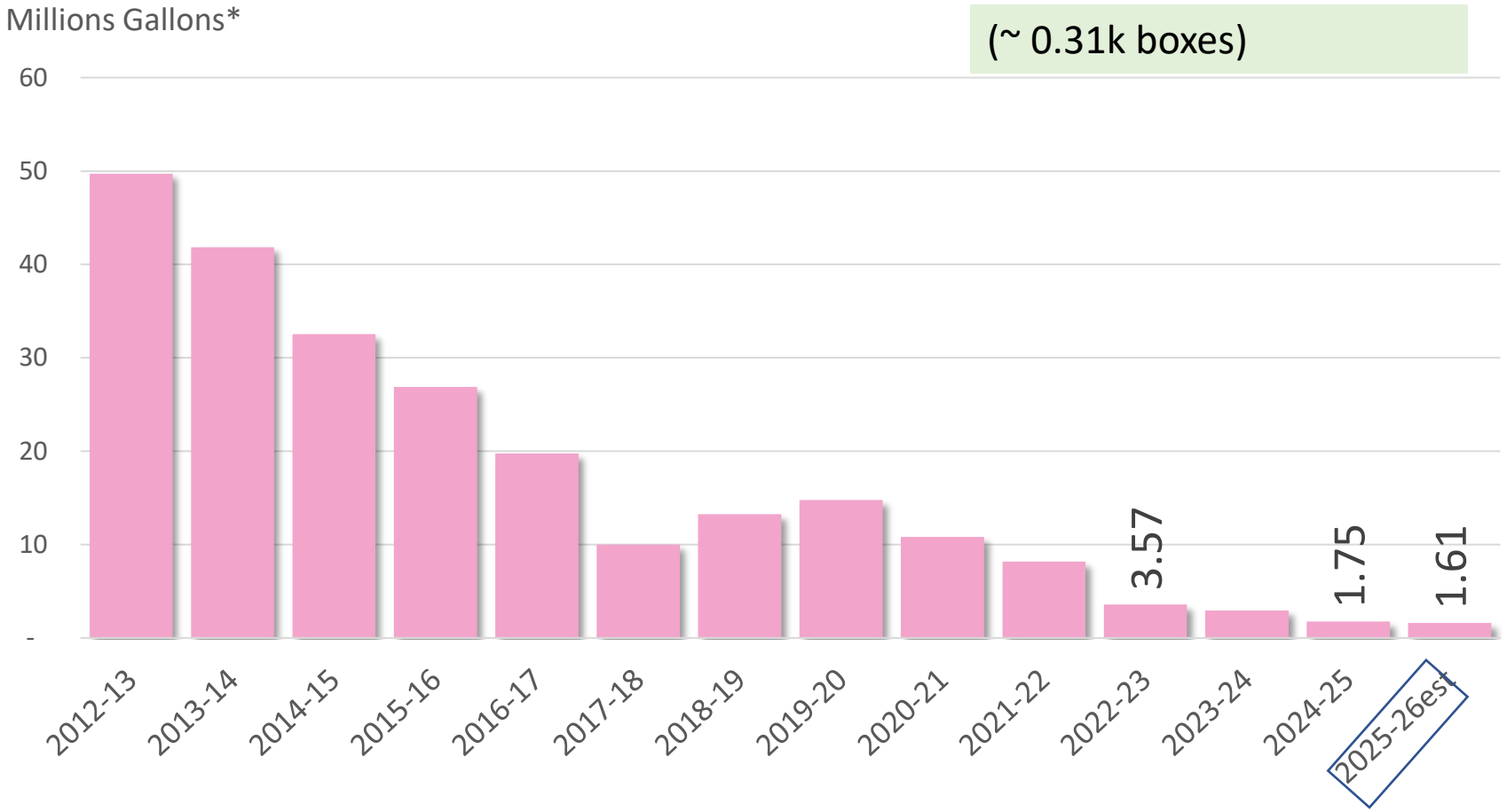
Florida Citrus Outlook 2025-26 Season

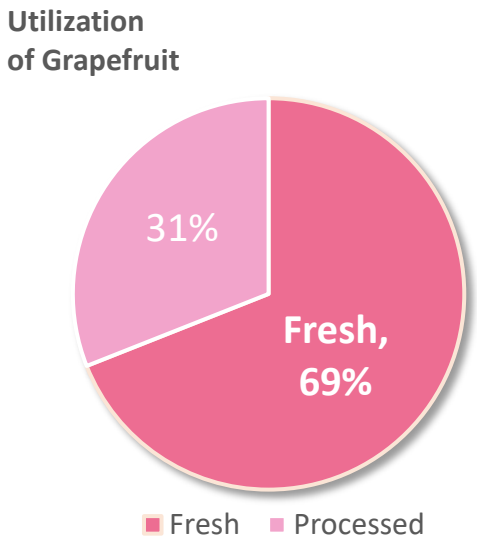
FLORIDA GRAPEFRUIT

Florida Grapefruit Utilization – January 2026

Item	2022-23	2023-24	2024-25p	2025-26f
	- - - - - - - - - million boxes - - - - - - - -			
Certified Fresh	1.037	1.171	0.872	0.828
FCGJ	--	--	0.002	<0.002
SSGJ (NFC)	0.683	0.585	0.375	0.346
Non-Certified	0.030	0.030	0.017	0.017
Other	0.060	0.004	0.034	0.007
TOTAL Utilized	1.810	1.790	1.300	1.200

Gallons of GJ produced from all Florida-sourced grapefruit





Conversion: 1 single-strength equivalent gallon of orange juice = 0.8655 pounds solids

Florida GJ Availability, Movement, and Carryover

Item	2022-23	2023-24	2024-25p	2025-26f
		million SSE gallons		
Beg. Inventory	12.66	9.58	6.57	**4.92**
Production/IM[a]	9.85	7.92	6.94	**6.80**
Availability	22.50	17.50	13.51	**11.72**
Movement	13.05	11.88	9.90	**7.77**
Domestic	13.02	11.85	9.84	**7.74**
Export	0.03	0.03	0.06	**0.03**
Bulk End. Inventory	9.74	6.4	4.77	**3.95**
		weeks supply		
GJ Carryover	38.8	28.2	**25.0**	**26.9**

[a] Foreign and domestic; reprocessed tangerine juice; net loss/gain during reprocessing; and adjustments.

U.S. GJ Supply & Domestic Use

	Beginning Inventory	US Production	Total U.S. Imports	Total U.S. Exports	Ending Inventory	Disappearance
Season	*- - - - - - - - million SSE gallons - - - - - - - - -*					
2022-23	15.33	15.68	8.90	3.92	10.46	25.53
2023-24	10.46	15.65	7.59	4.39	8.89	20.42
2024-25p	10.46	15.65	7.59	4.39	8.89	20.42
2024-25p	8.89	12.06	6.80	5.07	6.07	16.59
2025-26f	**4.46**	**12.38**	**6.65**	**4.46**	**6.14**	**12.90**

*** 2019-20 and forward includes estimated non-Florida processor U.S. cold storage**

Fresh Grapefruit Shipments

Season	Dom.	Canada	Europe	Far East	Total Exports	Total	
	- - - - - - - - - - - - million cartons - - - - - - - - - - - -						*mil. boxes*
2021-22	2.456	0.155	0.388	0.295	0.854	3.310	1.655
2022-23	1.711	0.099	0.177	0.074	0.360	2.071	1.036
2023-24	2.091	0.083	0.112	0.049	0.251	2.343	1.171
2024-25p	**1.659**	**0.054**	**0.015**	**0.011**	**0.084**	**1.743**	**0.872**
2025-26f	**1.581**	**0.051**	**0.014**	**0.010**	**0.075**	**1.656**	**0.828**

FLORIDA SPECIALTY

Specialty Tangerine Citrus



Season	Fresh*	Processed	Total
2021-22	0.484	0.266	0.750
2022-23	0.335	0.145	0.480
2023-24	0.329	0.121	0.450
2024-25p	0.243	0.157	0.400
2025-26f	0.243	0.157	0.400

*** Includes USDA non-certified.**

www.floridacitrus.org/grower/economic-market-resources/

Thank You