# Economic & Market Research Committee Report

*Presented to the*
*Florida Citrus Commission*
*June 10, 2026*

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Florida Citrus™

FLORIDA DEPARTMENT OF CITRUS

# Agenda

Florida Citrus Update: Crop Utilization, Demand, and Consumer Awareness

# USDA Florida Citrus Crop Forecast – 2025-26

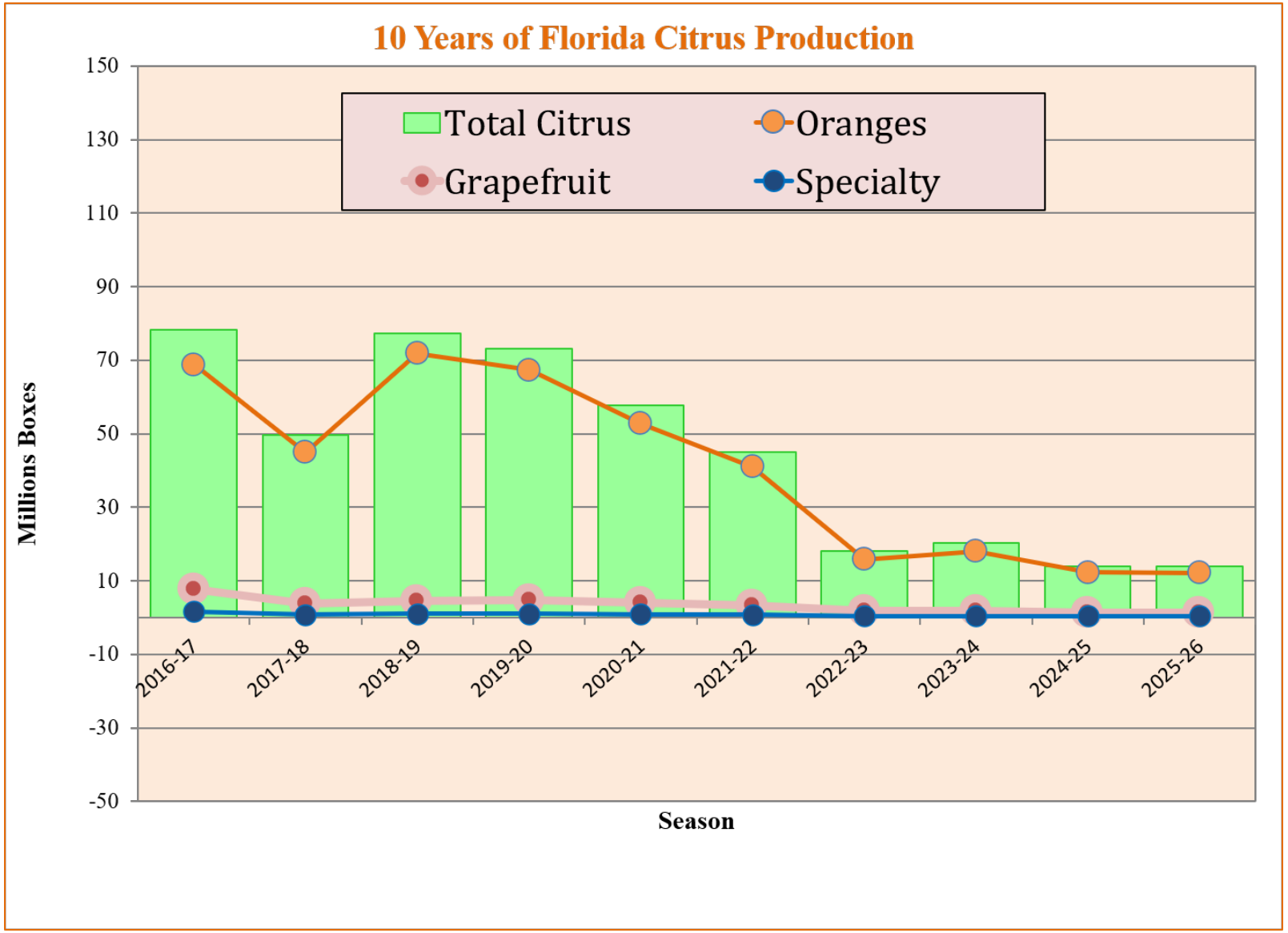
Source: USDA April 2026 Forecast

## 13.9M Boxes

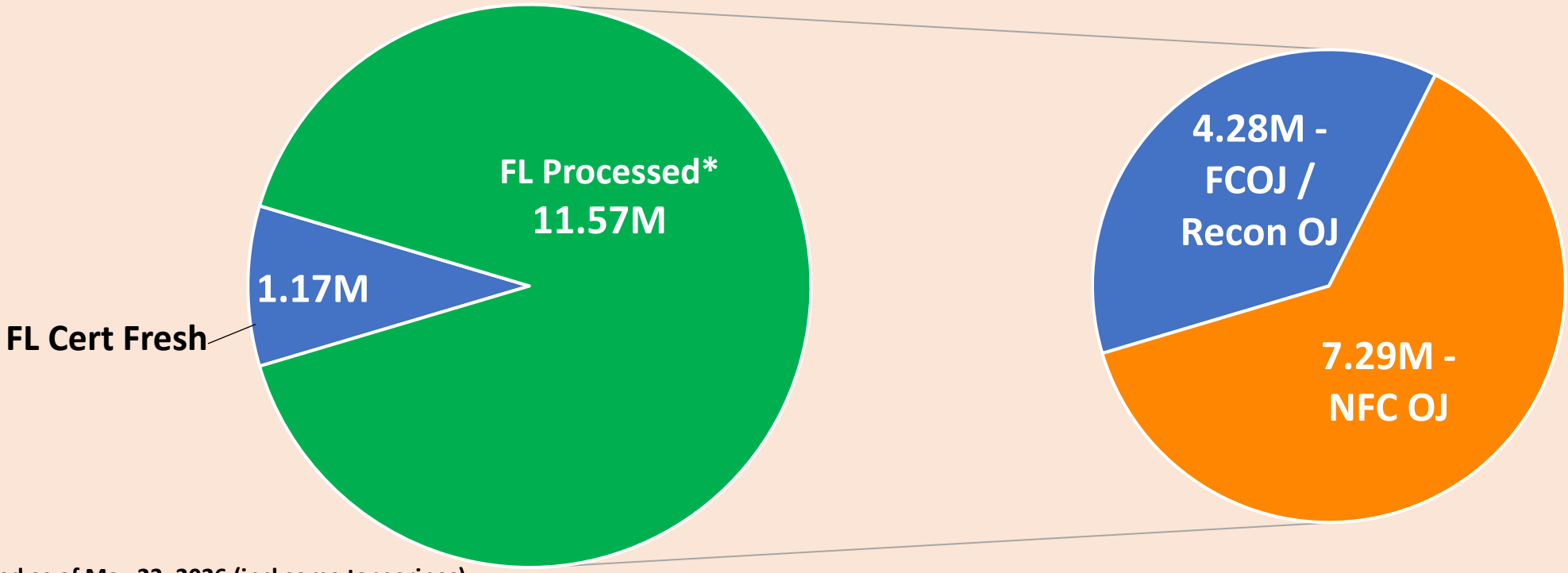
**Oranges – 12.2M**
**Non-Valencia 4.7M**
**Valencia 7.5M**

**Grapefruit – 1.25M**
**Red – 1.17M**
**White – 80k**

**Specialty – 450k**



# Florida Orange Utilization – 12.74M*




*Estimated as of May 23, 2026 (incl some tangerines)

Fresh Certified FCOJ NFC OJ

Share of total OJ as retail consumption is estimated to range from 66-68%.

# Oranges Regions Served

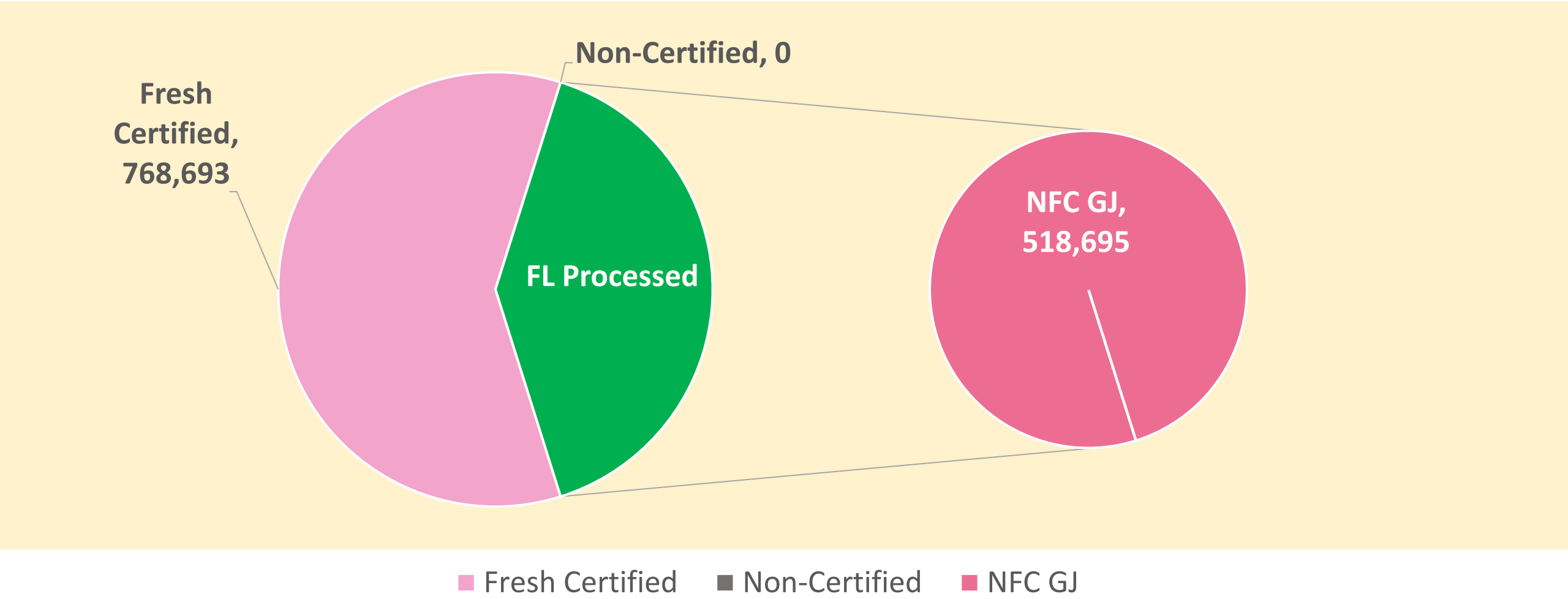


## Florida Fresh Orange – 2025-26 Distribution

| Region | 90-lb Boxes | % Share | Notes |
|---|---|---|---|
| Southern | 465,032 | 46.4% | Primary domestic market |
| Northeast | 272,775 | 27.2% | Critical secondary market |
| Central | 204,076 | 20.4% | Solid tertiary market |
| Western | 48,651 | 4.9% | Y-O-Y growth - Modest volume |
| Canada | 5,261 | 0.52% | Limited, but strong export mkt. |
| Other U.S. | 6,399 | 0.64% | Incl. Puerto Rico, |
| Overseas | <500 | 0.02% | Incl CBI |

***Estimated as of May 2026**

# Florida Grapefruit Utilization – 1.287M*




***Estimated as of May 2026**

# Grapefruit Regions Served



**Florida Fresh Grapefruit – 2025-26 Distribution**

| Region | 85-lb Boxes | % Share | Notes |
|---|---|---|---|
| United States | 736,464 | 95.8% | Primary domestic market; Southern Region with 54.9% share |
| Canada | 19,625 | 2.60% | Strongest export market |
| Europe | 5,670 | 0.74% | Niche, premium |
| East Asia | 5,230 | 0.68% | Japan & South Korea |
| Other | 1,704 | 0.20% | Includes Puerto Rico, Africa, & others |

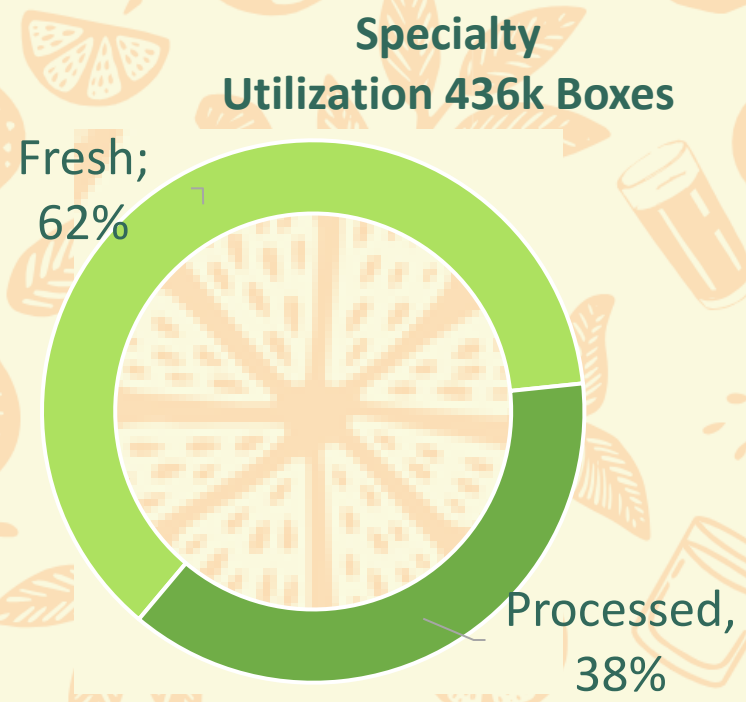
***Estimated as of May 2026**

# Tangerines & Mandarins
# Regions Served



**Florida Fresh Specialty – 2025-26 Distribution**

| Region | 90-lb Boxes | % Share | Notes |
|---|---|---|---|
| Southern | 164,626 | 58.8% | Primary domestic market |
| Northeast | 64,302 | 23.0% | Critical secondary market |
| Western | 31,356 | 11.2% | Moderate share of volume despite long distance |
| Central | 17,318 | 6.2% | Lower tier market/ Opportunity for Growth |
| Canada | 1,986 | 0.7% | Primary export mkt |
| Overseas | <500 | 0.17% | Niche, premium |



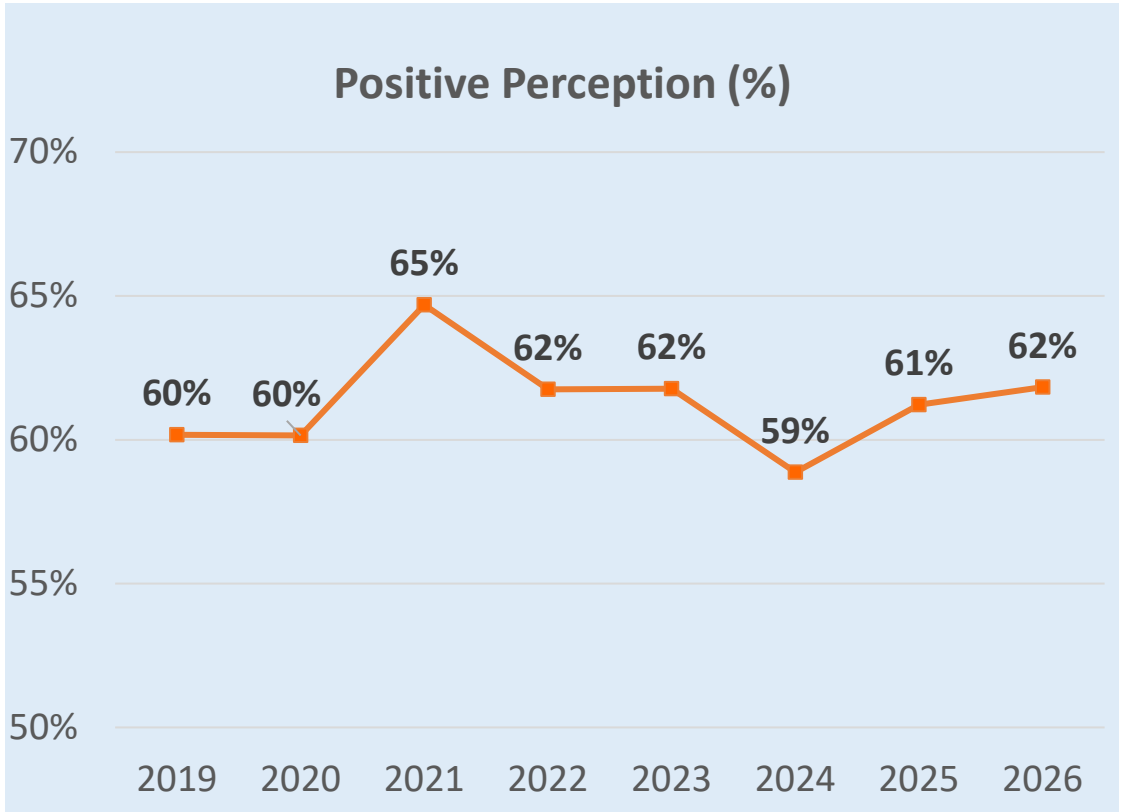

***Estimated as of May 2026**

# Orange Juice at Retail – Season-YTD through 5/16/26

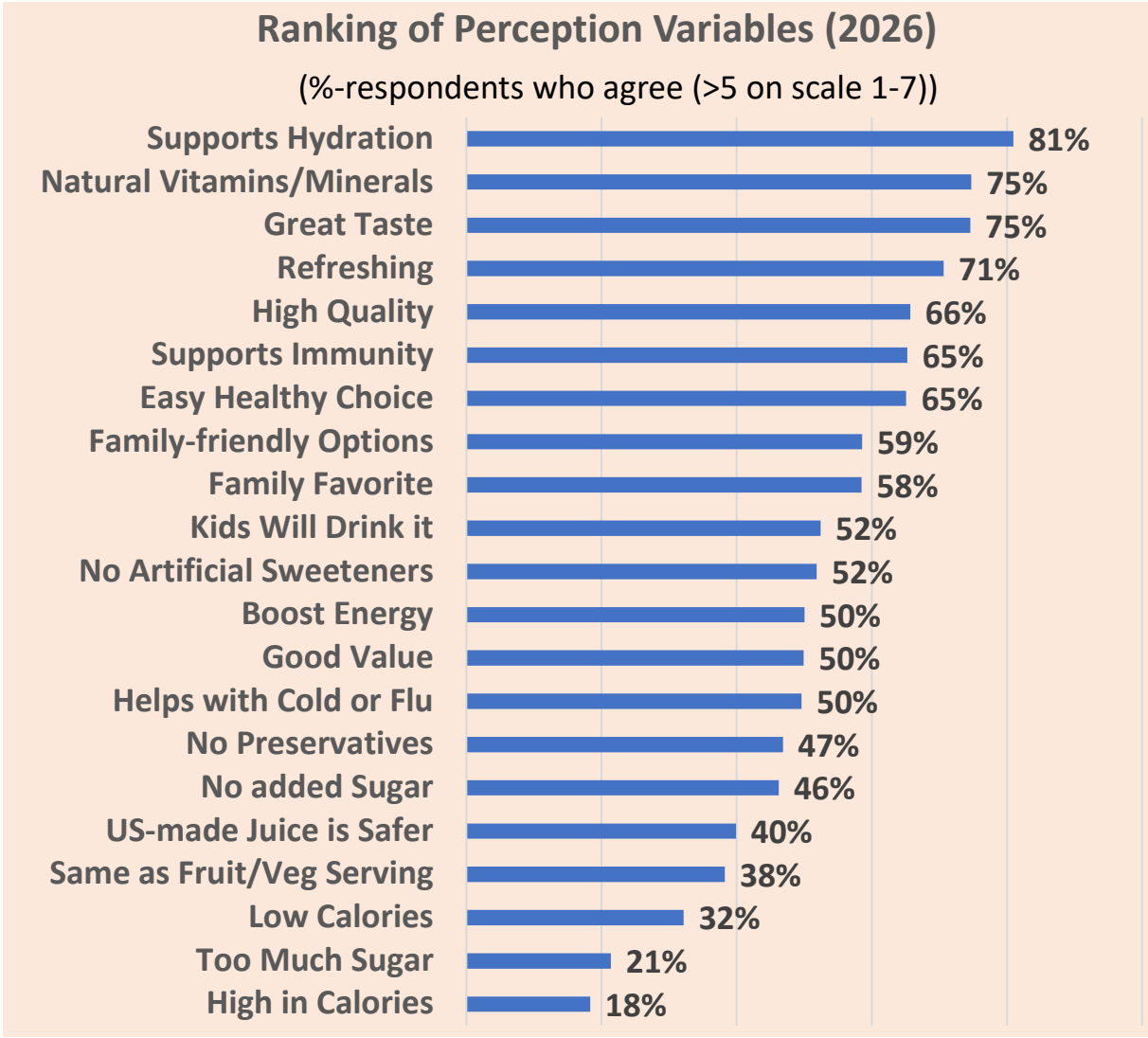
| Total US - xAOC | Gallons | | | Dollars | | | Price per EQ Gallon | | |
|---|---|---|---|---|---|---|---|---|---|
| **Season-YTD through 5/16/26** | S-YTD 2024-25 | S-YTD 2025-26 | % Chg | S-YTD 2024-25 | S-YTD 2025-26 | % Chg | S-YTD 2024-25 | S-YTD 2025-26 | % Chg |
| TL OJ | 192.02 M | 177.84 M | -7.39% | $2,052.47 M | $2,092.31 M | 1.94% | $10.69 | $11.77 | 10.07% |
| TL OJ REF NFC | 127.11 M | 121.55 M | -4.37% | $1,454.60 M | $1,557.30 M | 7.06% | $11.44 | $12.81 | 11.95% |
| NFC <11oz | 2.10 M | 2.07 M | -1.44% | $40.70 M | $42.33 M | 4.00% | $19.40 | $20.47 | 5.53% |
| NFC 11-20oz | 2.55 M | 2.67 M | 4.73% | $62.68 M | $67.98 M | 8.46% | $24.59 | $25.47 | 3.56% |
| NFC 20-40oz | 1.30 M | 0.90 M | -31.26% | $27.41 M | $23.62 M | -13.83% | $21.03 | $26.37 | 25.36% |
| NFC 40-70oz | 87.32 M | 81.65 M | -6.49% | $966.92 M | $1,014.25 M | 4.89% | $11.07 | $12.42 | 12.18% |
| NFC 70-110oz | 28.17 M | 29.38 M | 4.29% | $304.92 M | $359.11 M | 17.77% | $10.82 | $12.22 | 12.92% |
| NFC >110oz | 5.67 M | 4.89 M | -13.73% | $51.96 M | $50.00 M | -3.77% | $9.17 | $10.23 | 11.54% |
| TL OJ REF RECON | 53.89 M | 48.15 M | -10.65% | $494.42 M | $454.30 M | -8.11% | $9.17 | $9.44 | 2.84% |
| TL GJ | 5.97 M | 5.47 M | -8.41% | $70.10 M | $67.24 M | -4.08% | $11.74 | $12.29 | 4.72% |

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

# Reinforce Positive Perceptions of OJ to Drive Consumer Purchase Intent




OJ_GOOD_Variable - %-respondents who agree (>5 on a 1-7 scale, to be consistent with performance measurements) – yearly average

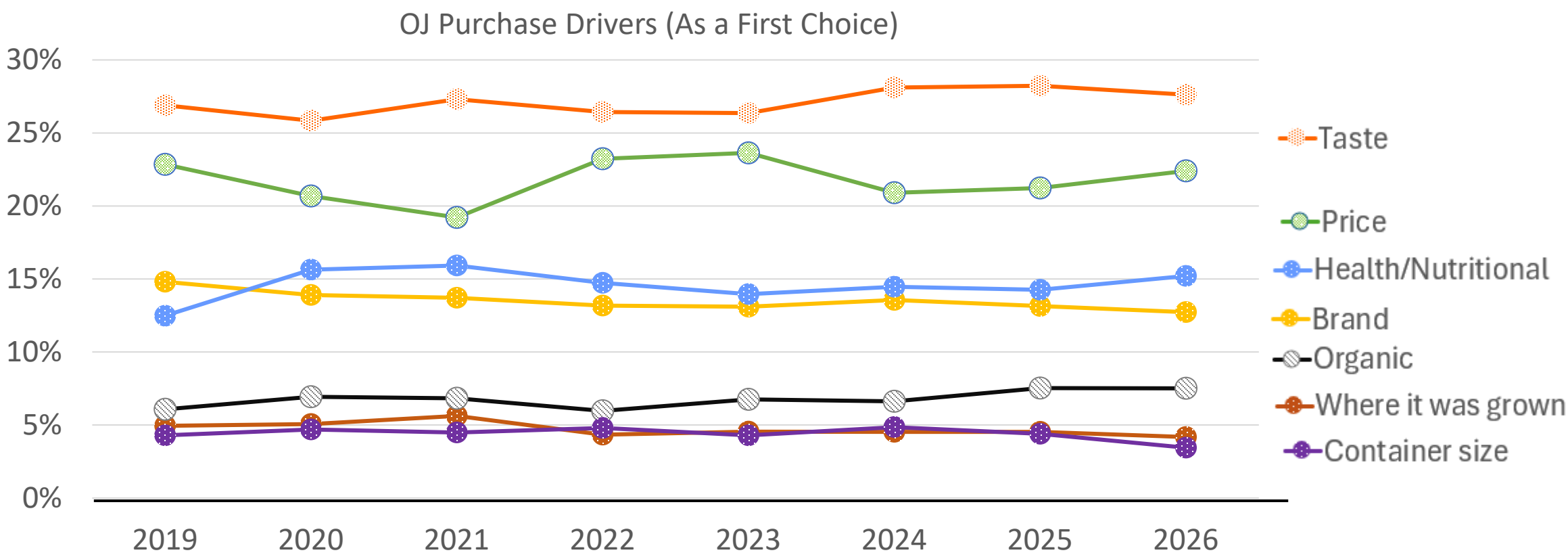



*2026 Data is January – May

Source: FDOC OJ Tracker – Managed by UF-FAMRC

# Significance of Taste, Price, Health/Nutritional and Other Key Drivers in 2026

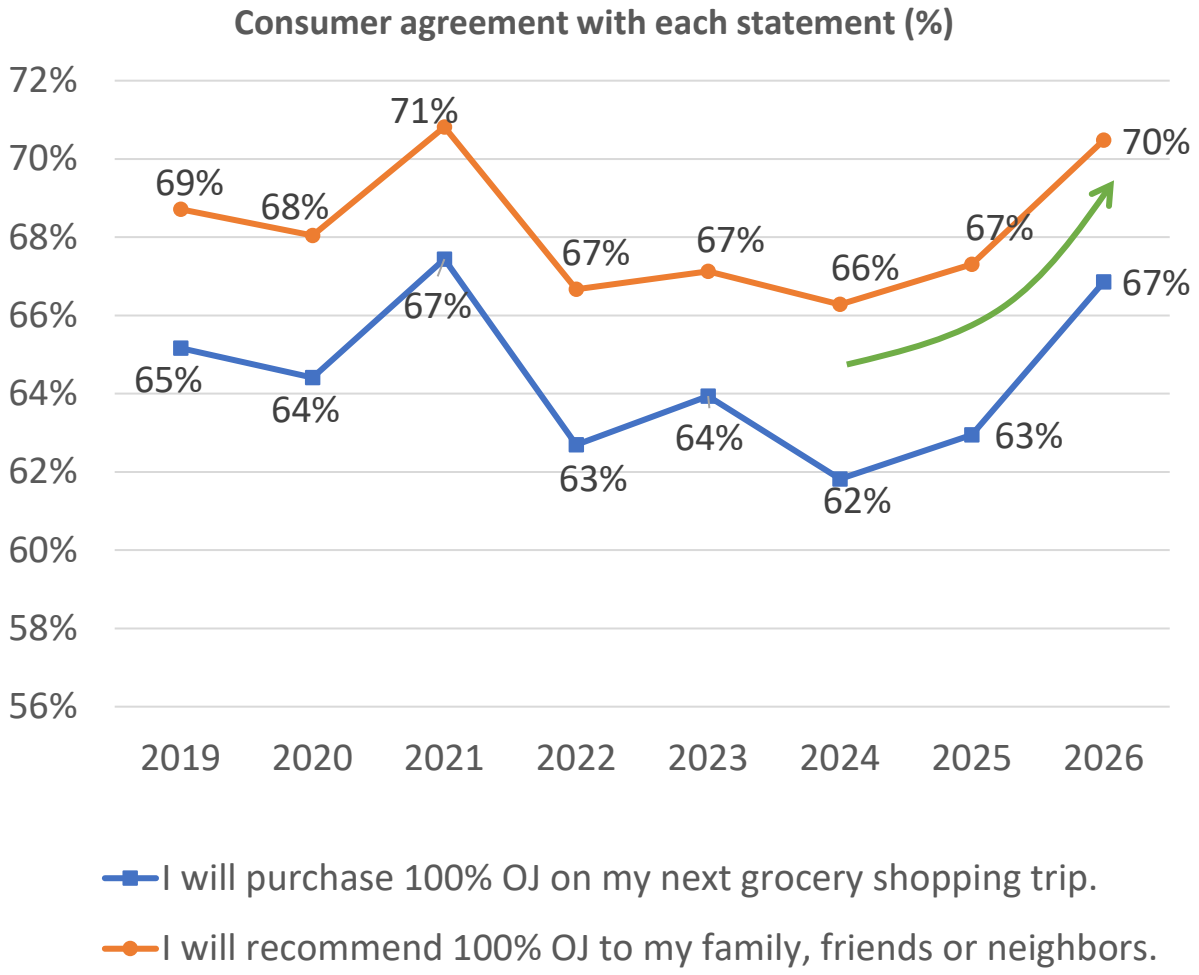
Question: When choosing 100% OJ, what factors went into your decision?

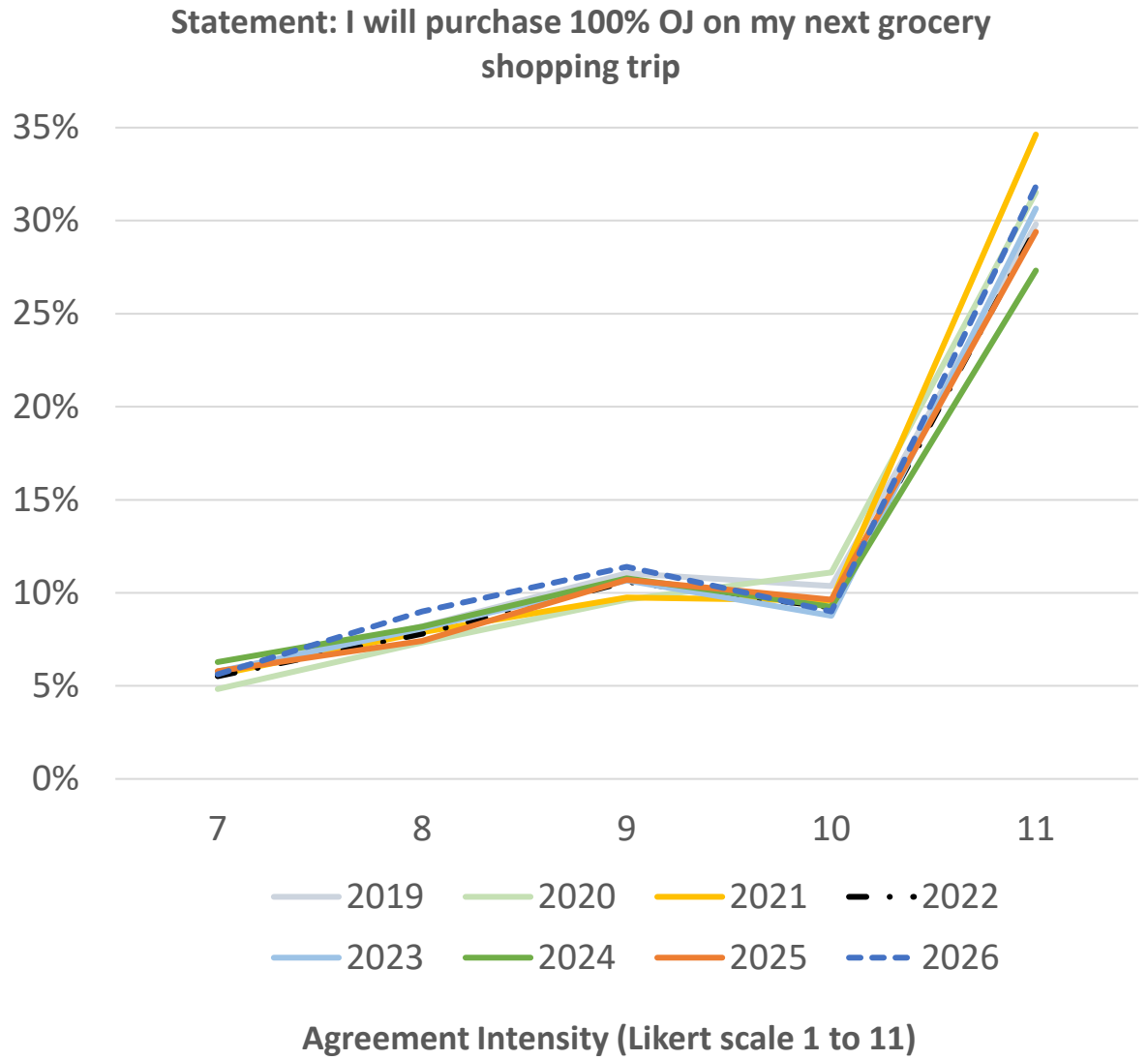



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Source: FDOC OJ Tracker – Managed by UF-FAMRC

# 100% OJ Purchase Intentions when OJ is “Top of Mind”



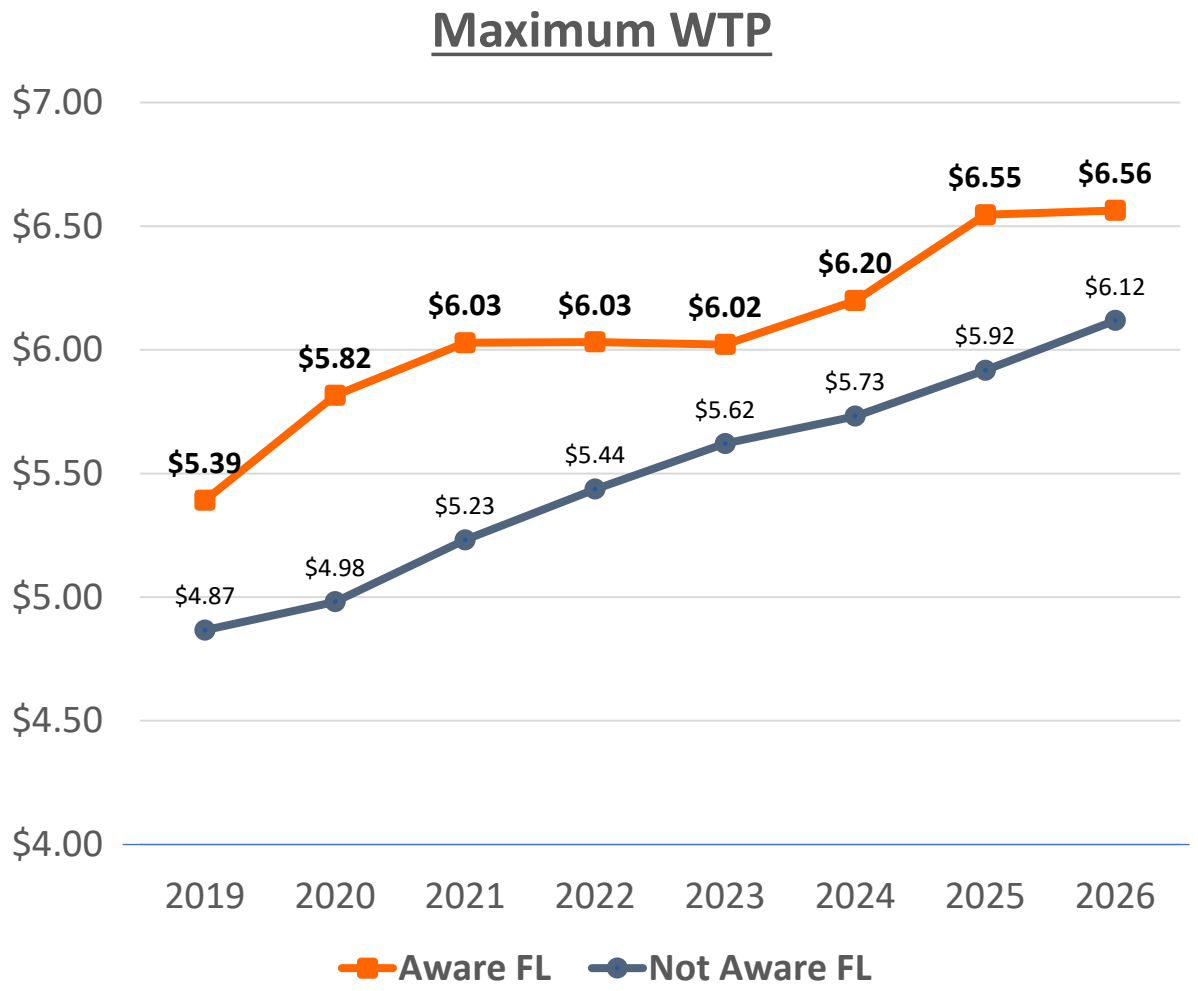




*2026 Data is January – May

Source: FDOC OJ Tracker – Managed by UF-FAMRC

# Cross Referencing Florida Awareness and WTP

- Consumers who recognized Florida in advertisements, promotions, or on container labels have a willingness to pay (WTP) of about 11% more for 100% orange juice compared to those who did not.
- Consistent higher agreement with good attributes of orange juice also suggested an increase in WTP more for 100% orange juice amid higher inflation in the category.




*2026 Data is January – May

Source: FDOC OJ Tracker – Managed by UF-FAMRC

# Fresh Citrus Fruit at Retail – Total US xAOC

## Avg Price per Pound

| Year | Total Citrus | Grapefruit | Lemons | Mandarins | Oranges | Tangelos | Tangerines |
|---|---|---|---|---|---|---|---|
| **2023 (Mar-Dec)** | $1.70 | $1.62 | $2.10 | $1.62 | $1.59 | $1.74 | $1.95 |
| **2024** | $1.73 | $1.62 | $2.08 | $1.71 | $1.57 | $1.74 | $2.07 |
| **2025** | $1.72 | $1.64 | $2.15 | $1.69 | $1.56 | $1.68 | $2.02 |

## Volume Sold (Mil lbs.)

| Year | Total Citrus | Grapefruit | Lemons | Mandarins | Oranges | Tangelos | Tangerines |
|---|---|---|---|---|---|---|---|
| **2023 (Mar-Dec)** | 2,199.19 M | 108.17 M | 400.59 M | 996.74 M | 656.09 M | 16.39 M | 21.21 M |
| **2024** | 2,772.04 M | 128.82 M | 475.99 M | 1,296.66 M | 827.71 M | 17.37 M | 25.49 M |
| **2025** | 3,036.60 M | 130.58 M | 494.73 M | 1,406.03 M | 951.98 M | 26.03 M | 27.25 M |

## Dollars (Mil $)

| Year | Total Citrus | Grapefruit | Lemons | Mandarins | Oranges | Tangelos | Tangerines |
|---|---|---|---|---|---|---|---|
| **2023 (Mar-Dec)** | $3,746.64 M | $175.44 M | $842.14 M | $1,617.95 M | $1,041.31 M | $25.52 M | $41.28 M |
| **2024** | $4,801.75 M | $208.34 M | $989.81 M | $2,217.26 M | $1,303.25 M | $30.26 M | $52.84 M |
| **2025** | $5,236.68 M | $213.70 M | $1,063.94 M | $2,377.28 M | $1,482.98 M | $43.64 M | $55.14 M |

**Source:** NIQ, Fresh Retail Database

# Key Purchase Drivers: Fresh Citrus

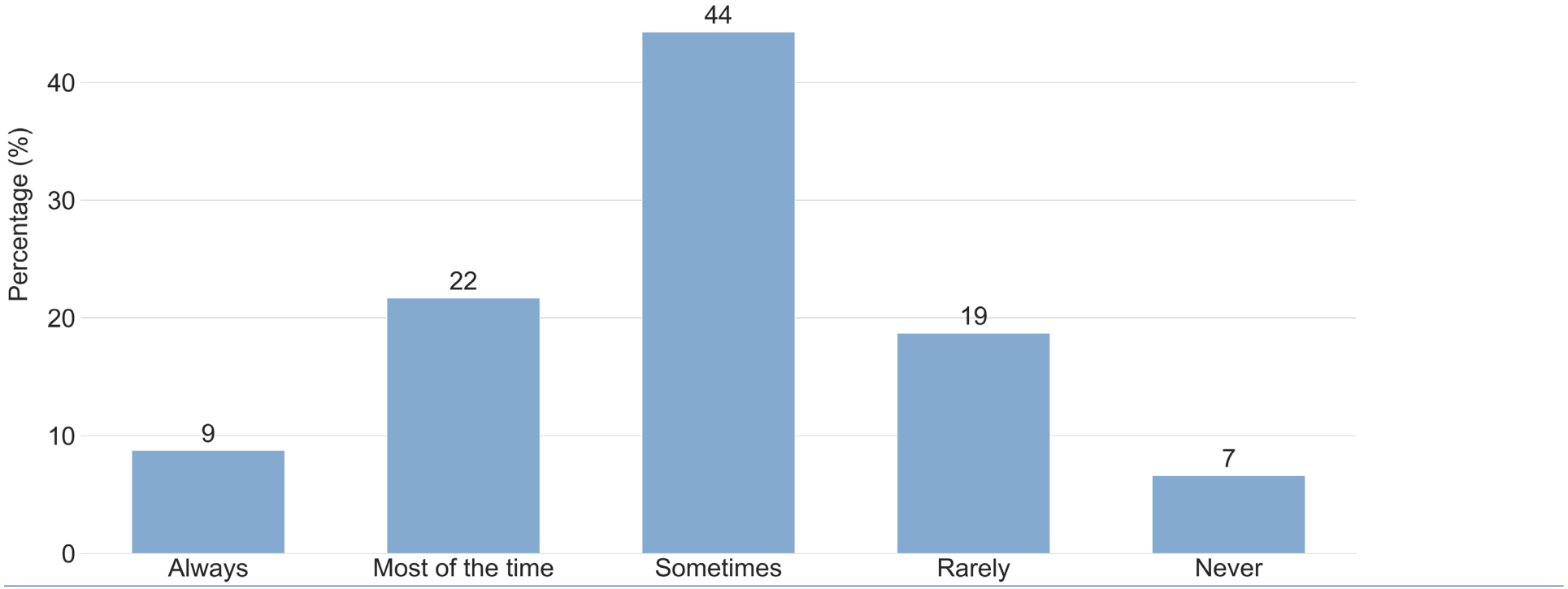
| Rank | Fresh Oranges | Fresh Grapefruit | Fresh Specialty Tangerines |
|---|---|---|---|
| **#1** | Freshness (90%) | Freshness (88%) | Freshness (90%) |
| **#2** | Juiciness (89%) | Juiciness (84%) | Juiciness (88%) |
| **#3** | Sweetness (88%) | Sweetness (81%) | Good Value (88%) |
| **#4** | Good Value (87%) | Appearance (81%) | Sweetness (87%) |
| **#5** | Health Benefits (82%) | Health Benefits (79%) | Health Benefits (83%) |
| **#6** | Price (81%) | Price (78%) | Ease of Peel (81%) |
| **#7** | Appearance (81%) | Seasonality (78%) | Price (80%) |

Source: Fresh Citrus Consumer Survey (FAMRC Report No. 2026-02), pages 23-25 Purchase Drivers


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# Origin Awareness

- Overall, over 40% of consumers indicated they are aware of the origin of their citrus "sometimes."
- Approximately 10% of consumers reported that they are "always" aware of their fruit's origin.



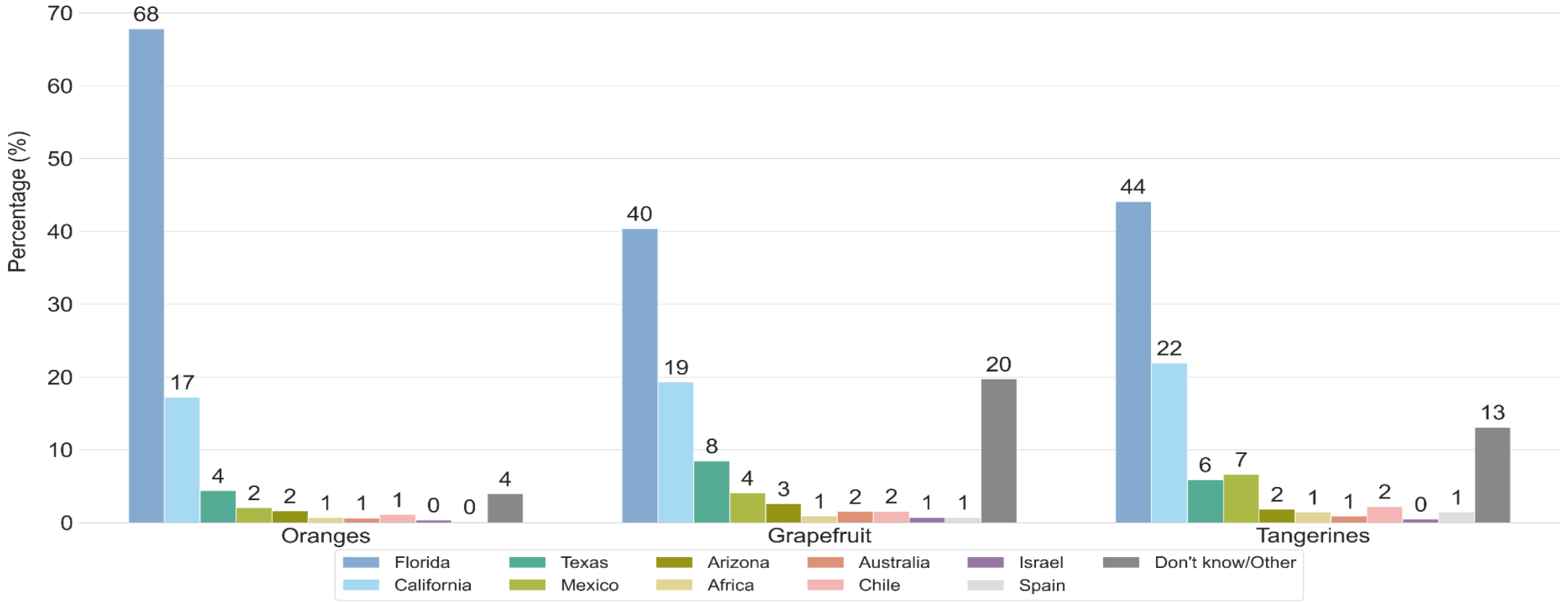

*Q5.2: When you purchase citrus are you aware of its country or state of origin? [n=1,600]*

*** Only the regional differences are significant*


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# Florida Brand Equity

- Overall, Florida is the most commonly recognized origin for citrus fruit production among consumers, followed by California , then Texas.





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# Florida Citrus Moving Forward

## *Key Takeaways & Strategic Implications*

### Florida Brand Equity is Strong

Florida is the most recognized citrus origin and awareness campaigns poised to drive purchase intent and willingness-to-pay.

### Key Indicators of Consumer Demand are Resilient

Strong perceptions of Taste, Health, and Value are persistent for both Fresh and Processed citrus.

### Retailer Engagement is an essential opportunity

Increasing Florida visibility at retail through partnerships and promotions can grow demand and increase WTP.

### Supply Constraints Persist

Lower crop volumes impede shelf space opportunities in the short-run. Focus on replanting, improving yields, and enhancing juice and fresh fruit quality.

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



# Thank You