Economic & Market Research Committee Report

Presented to the
Florida Citrus Commission
March 18, 2026

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Florida Citrus™

FLORIDA DEPARTMENT OF CITRUS

EMRD Agenda

- Audited Post Estimate Fruit Price Report in 25-26 Season
- Fresh Citrus Movement and Retail Sales Trends
- Orange Juice, Grapefruit Juice Retail Sales Trends
- Household Purchase Trends in the Beverage Category

Handouts

1. Briefing Memo to PSRAC - 2025-26 Post Estimate Reporting Process
2. Rule 20-3 Reports by Citrus Fruits Dealers
3. Nielsen Topline Report #5 of the 2025-26 Season
4. Nielsen Retail Sales Trends Report #5 of the 2025-26 Season
5. Household Purchase Dynamics in Beverage Category
   - Summary Overview - Household Purchase Dynamics in Beverage Category
   - Consumer Perceptions
6. Economic Indicators – March 2026

Agenda Item:

Audited Post Estimate Fruit Price Report in 25-26 Season

Audited Post Estimate Fruit Price Report in 25-26 Season

BACKGROUND:

- Rule 20-3.007, Florida Administrative Code, establishes the reporting requirements for Post-Estimate Price Reports. The rule requires licensed citrus fruit dealers engaged in processing to submit weekly data beginning after USDA's initial crop estimate, regardless of volume reported, and the Department must compile and publish audited reports at designated harvest thresholds.


USDA's National Agricultural Statistics Service
Florida Field Office *(Part of the Southern Regional Field Office)*

Citrus Production Forecast

2025-26 Season

OCT 9, 2025 (Not published due to lapse in Federal funding)

JAN 12, 2026

APR 9, 2026

JUL 10, 2026

- 20-3.007(3) states that data "is reported only for fruit for which a contract has been executed after the release of the initial USDA Crop Estimate for the current fruit season (generally released in October of each year)".
  - ❑ Due to a Federal Government shutdown from 10/1/2025 through 11/12/2025, the initial USDA Crop Estimate for the 2025-26 season was officially released on January 12, 2026.

Audited Post Estimate Fruit Price Report in 25-26 Season

ISSUE:

A review of the Post Estimate input forms received from processing facilities, as well as the subsequent audit findings, indicates there are no post-estimate fruit boxes and corresponding prices to report for either early-midseason oranges or grapefruit in the first two Audited Post-Estimate Fruit Price Reports following the initial release of the USDA Crop Estimate of the 2025-26 season.

Update to Briefing Memo: Audited Report # 3 will reflect post-estimate contracts for red grapefruit and Audited Report #4 will reflect post-estimate contracts for Valencia.

Issue for Commission Direction

<u>Release Timing</u> – Audited Post Estimate Fruit Price Report # 3 (25-26)

Option 1 – Confirm January 12, 2026

Recognize January 12, 2026 as the initial release date of the USDA citrus production forecast of the 2025-26 season.

Option 2-

Recognize October 9, 2025, the originally scheduled date of the USDA citrus production forecast, as the initial benchmark for the date for the estimate.

Issue for Commission Direction

Future Handling of Estimate Report Timing

Option 1 – Maintain current regulatory structure and established interpretation under Rule 20-3, F.A.C.

Option 2 – Establish contingency criteria for Federal or other Disruptions.

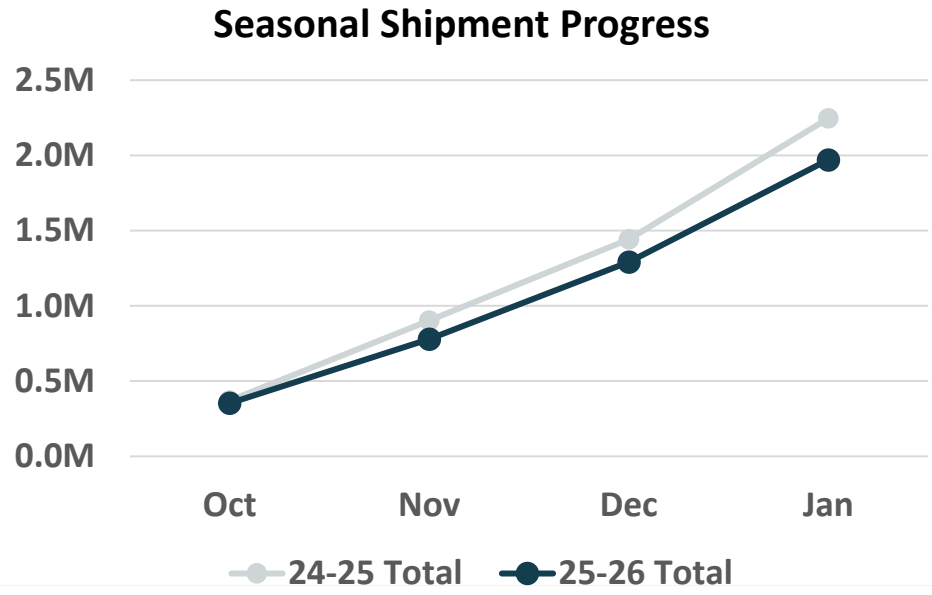
Agenda Item:

Fresh Citrus Movement and Retail Sales Trends

Florida Fresh Certified Shipments - Cartons

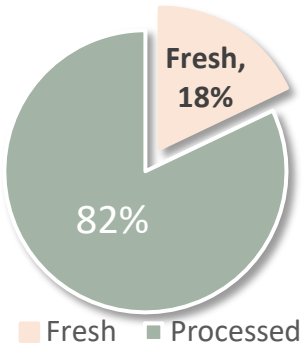
Season-to-date through Feb 15, 2026

Season-to-Date Change vs Last Season	
Oranges	+14.1%
Grapefruit	-25.9%
Specialty	+61.4%
Total Regulated	-8.1%



Season-to-Date Current Shipments	
Oranges	1,209,269
Grapefruit	1,053,394
Specialty	54,234
Total	2,298,071

Data Source: FDACS



Estimated 25-26 Crop Util thru 2/15/26

Date	2024-25	2025-26
Oct	353k	371k
Nov	780k	902k
Dec	1.29M	1.44M
Jan	1.97M	2.25M
Thru Feb 15th	2.500M	2.298M

Florida Fresh Citrus - PLU/UPC-Level Retail Data Purchase

Scope: One-time retail data extract at UPC and PLU level for fresh citrus categories.
One-time Data Extract Cost - $19,487

Geographic Coverage



Total U.S. Retail Market (xAOC)

Data Coverage

- UPC and PLU level retail data
- All items within each citrus category
- Three years of weekly historical data

Product Categories



- Fresh Oranges,
- Grapefruit,
- Lemons,
- Tangerines,
- Mandarins,
- Tangelos

Metrics Included



- Dollar sales
- Units sold,
- Equivalent pounds
- Avg unit price
- Avg equivalent price
- %-ACV distribution

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 Takeaway:
Opportunity Comes with Strategic Positioning of Florida at Retail



Florida's competitive advantage is rooted in reputation for delivering premium fruit.

- Florida fresh citrus volumes will remain limited in near-term but will grow with replanting efforts.
- Limited supply and high cost to produce require premium pricing to be economically viable for the Florida grower.
- Fresh market channels do not require mass volume to be profitable when they reward origin and quality.
- Florida already reaches strategic domestic and export markets despite small supply.

Agenda Item:

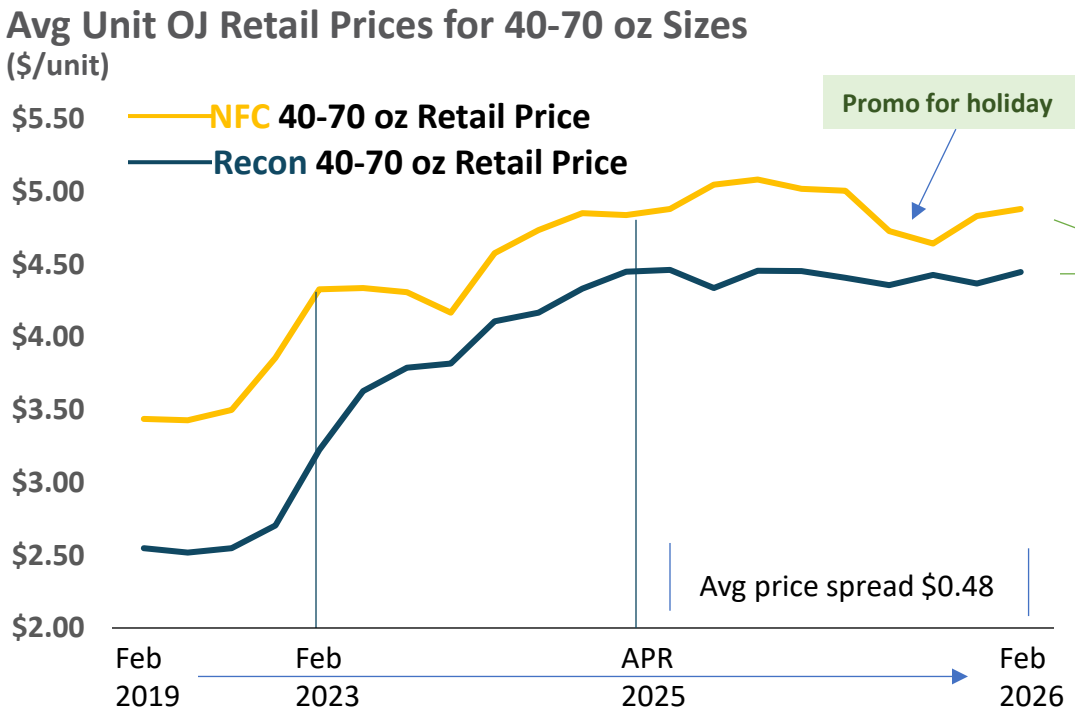
Orange Juice, Grapefruit Juice Retail Sales Trends

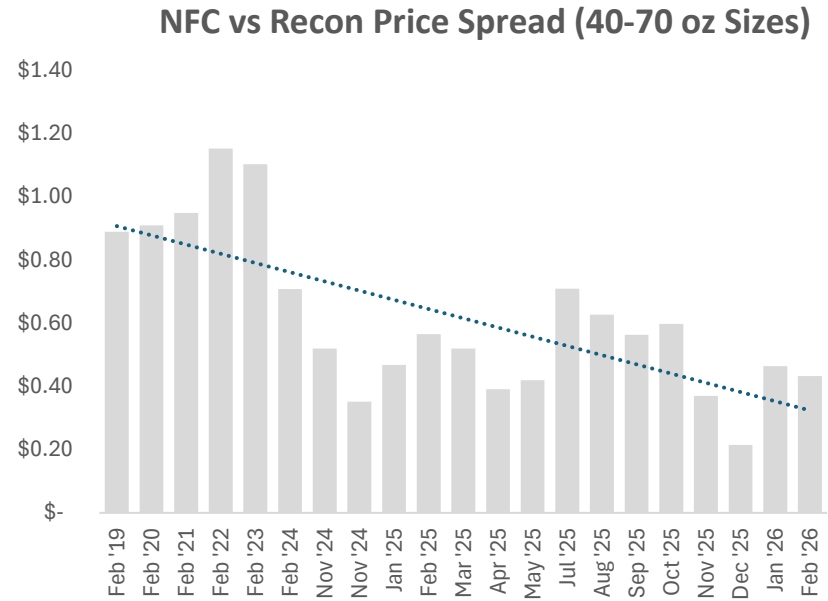
Orange Juice at Retail – Season-YTD through 2/21/26

Total US - xAOC	Gallons			Dollars			Price per EQ Gallon		
Season-YTD through 2/21/26	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	125.05 M	112.92 M	-9.69%	$1,284.11 M	$1,309.25 M	1.96%	$10.27	$11.59	12.90%
TL OJ REF NFC	82.41 M	77.18 M	-6.35%	$901.16 M	$967.48 M	7.36%	$10.94	$12.54	14.63%
NFC <11oz	1.35 M	1.32 M	-2.68%	$25.82 M	$26.62 M	3.07%	$19.09	$20.22	5.91%
NFC 11-20oz	1.62 M	1.66 M	2.22%	$38.97 M	$42.26 M	8.42%	$24.02	$25.48	6.07%
NFC 20-40oz	0.82 M	0.60 M	-26.78%	$17.04 M	$15.48 M	-9.15%	$20.70	$25.69	24.08%
NFC 40-70oz	57.44 M	50.94 M	-11.32%	$601.38 M	$614.38 M	2.16%	$10.47	$12.06	15.20%
NFC 70-110oz	17.40 M	19.66 M	13.00%	$184.55 M	$238.39 M	29.18%	$10.61	$12.13	14.31%
NFC >110oz	3.77 M	3.01 M	-20.38%	$33.40 M	$30.36 M	-9.10%	$8.85	$10.10	14.16%
TL OJ REF RECON	35.58 M	30.46 M	-14.39%	$317.79 M	$289.64 M	-8.86%	$8.93	$9.51	6.46%
TL GJ	3.79 M	3.45 M	-9.04%	$43.85 M	$42.68 M	-2.68%	$11.57	$12.37	7.00%

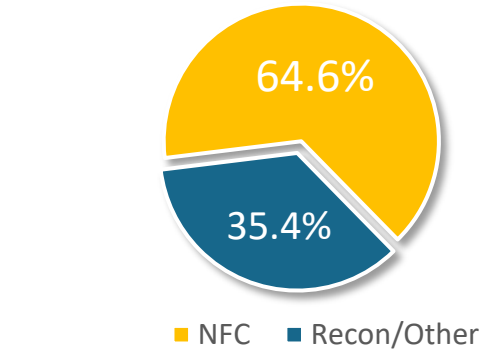
Data Source: FDOC Custom Database Nielsen. xAOC = Expanded All Outlets Combined.

Average Unit Retail OJ Prices for 40-70 oz - NFC and Recon Converge





- ✓ Retail prices remain historically high.
- ✓ Rate of increase slowing month to month.
- ✓ NFC and Recon prices trend towards convergence into premium pricing for most common sizes as supply tightens.



Agenda Item:

Household Purchase Dynamics in the Beverage Category

EMRD Report:

Nielsen Homescan Household Purchase Analysis

OJ Tracker – Managed by UF-FAMRC

Objectives

- **Household Panel Data Used to Identify Beverage Purchase Trends**
  - Provide an overview of beverage category purchase patterns and trends;
  - Identify changing dynamics among orange juice (OJ), grapefruit juice (GJ) and competitive fruit juices; and
  - Detail OJ and GJ household purchasing trends;

Full Market Summary Report available
www.floridacitrus.org/grower/economic-market-resources/research/

Parameters

- **The Homescan Consumer Purchase Panel plus Enhanced Trip Projection:**
  - 3.05 million “Raw Occasions” used for sample
  - 128.9 million Buyers assumed for projection
  - Demographically & geographically balanced to represent U.S. population
  - Report Appendix provides more information on methodology changes
- **The Data:**
  - All UPC coded purchases from all outlets (over 8,000 unique UPCs)
  - Consumer perceived details (i.e. coupons & store sales)
  - Volume: Equivalent gallons*
- **Time Periods:**
  - 2025 Year (12/29/2024 to 12/27/2025) vs.
  - 2024 Year-Ago (12/31/2023 to 12/28/2024)

***NOTE**: Equivalent gallons in Nielsen Panel data are derived from estimated unit sizes and volumes sold. While dollar sales align, equivalent gallons may not reconcile with the FDOC custom database which is maintained monthly.

Parameters

- **Geography:**
  - Total U.S., All Outlets

- **Category Definition:**
  - TOTAL BEVERAGES* is disaggregated into the following segments:

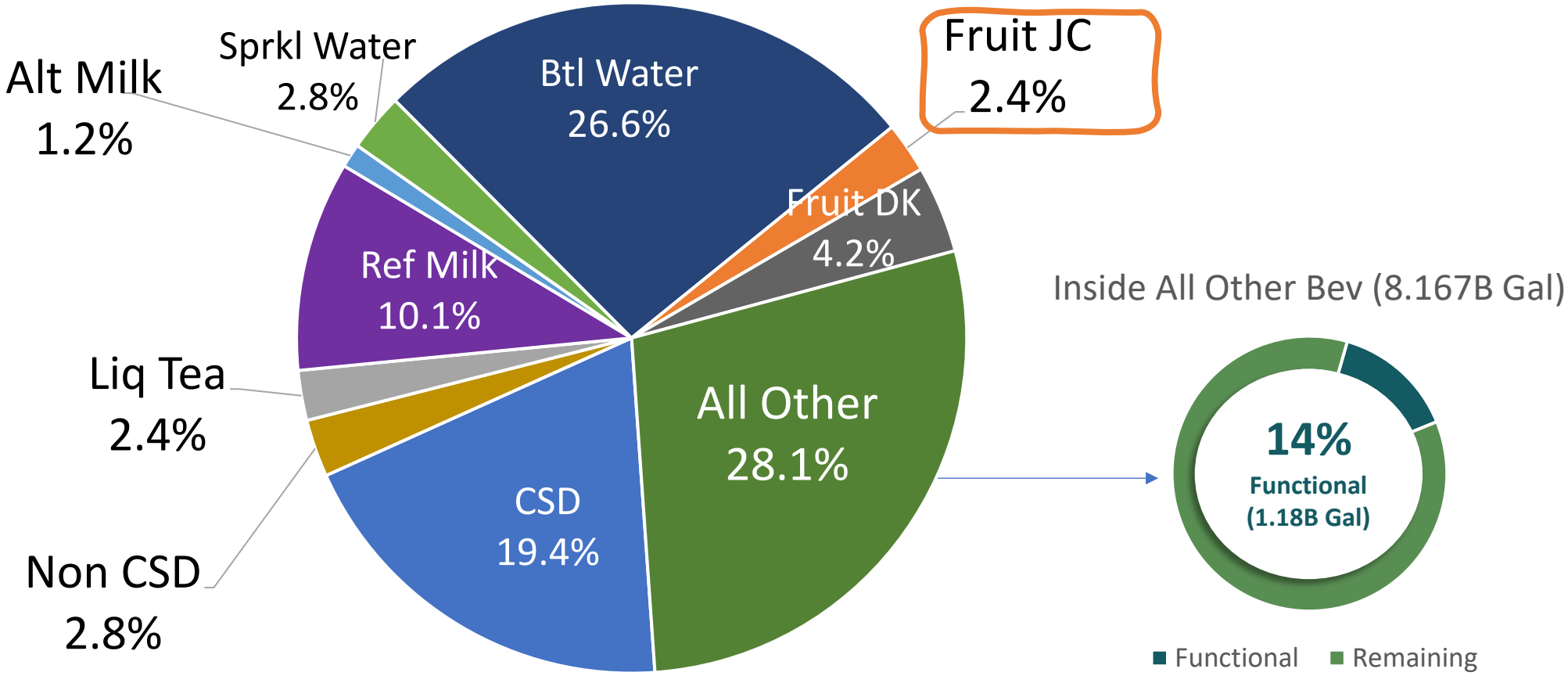
    - Carbonated Soft Drinks (CSD)
    - Ref, White & Flavored Milk
    - Liquid Tea
    - Dry Coffee
    - Isotonics
    - Bottled Water
    - Shakes & meal replacement drinks
    - Non-Carb Soft Drinks (non CSD)
    - Liquid Coffee
    - Dry Tea
    - Fruit Juices & Drinks
    - Vegetable Juice/Drinks
    - Sparkling Water
    - Functional Beverages
    - Plant-based milk alternatives (e.g., oat, almond)
    - Coffee creamer (disaggregated from TTL Beverage to monitor consumer trends)

Functional beverages are non-alcoholic drinks containing bioactive ingredients that deliver health benefits beyond basic nutrition and hydration (Giri et al., 2023).

***NOTE:** Nielsen Panel data uses syndicated definitions not maintained as frequently as the FDOC custom database.

Beverage Category Gallon Shares in 2025

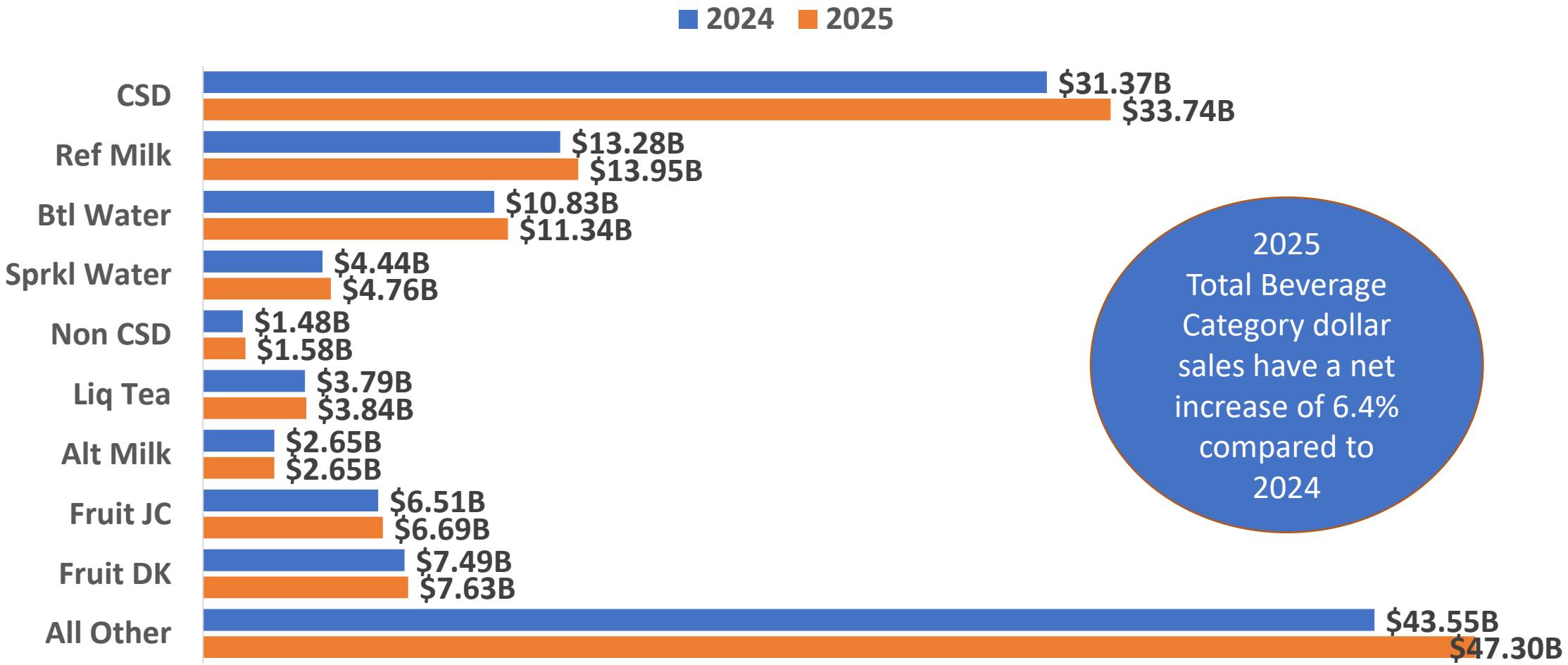
Volume in Beverage category 1% growth compared to 2024 with estimated 29.1B Gallons



Source: Nielsen HomescanTM data for Y/E Dec 2025

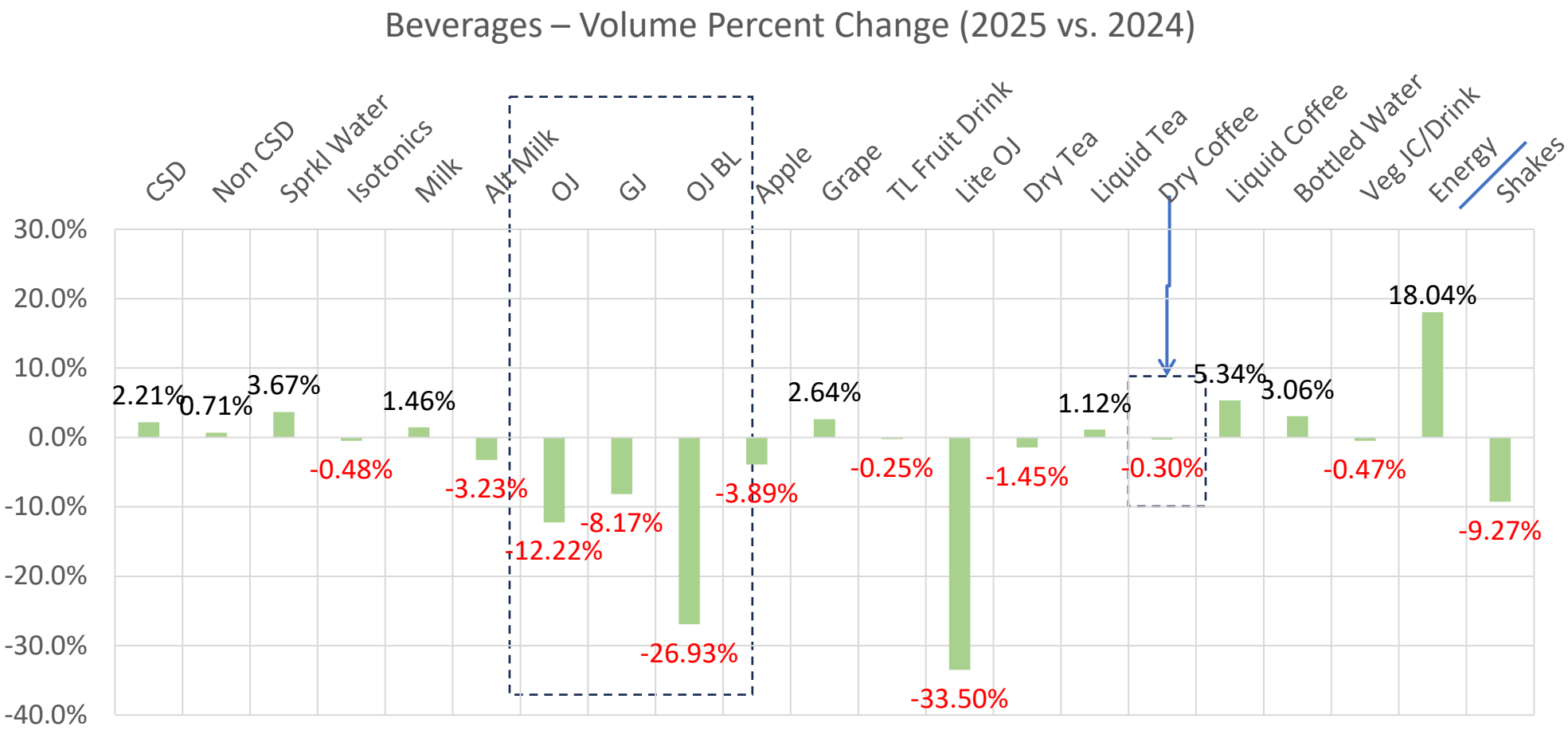
Panel Data Sales Summary - Estimated at $133.4 Billion

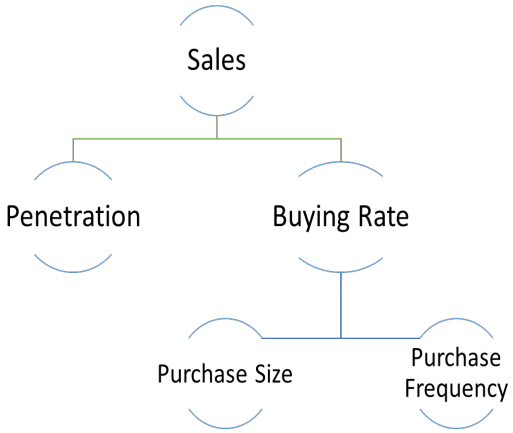
Select Beverage Categories (in $billions)



Source: Nielsen HomescanTM data for Y/E Dec 2025

How Beverage Category Trends Shifted in 2025

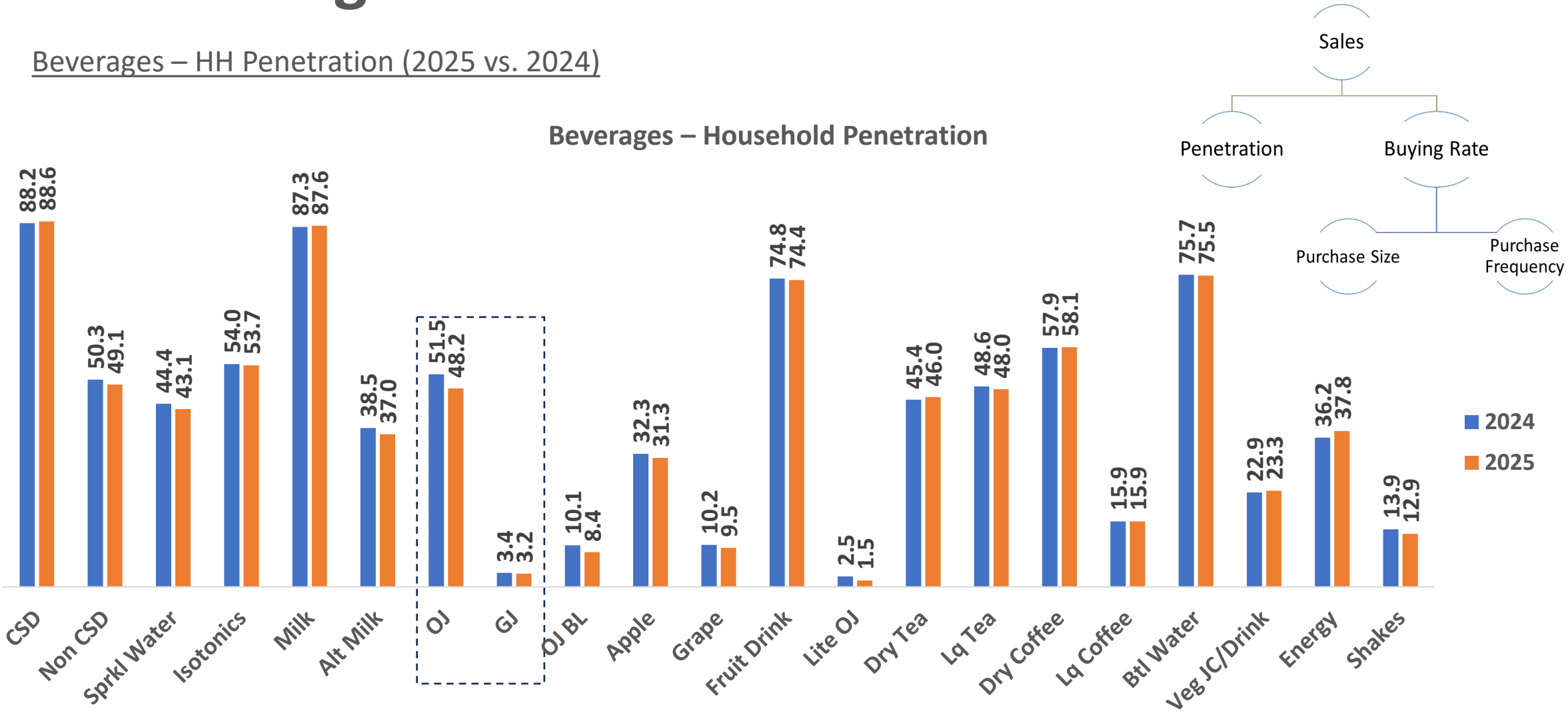




Source: Nielsen HomescanTM data for Y/E Dec 2025

Changes in HH Penetration Mixed in 2025

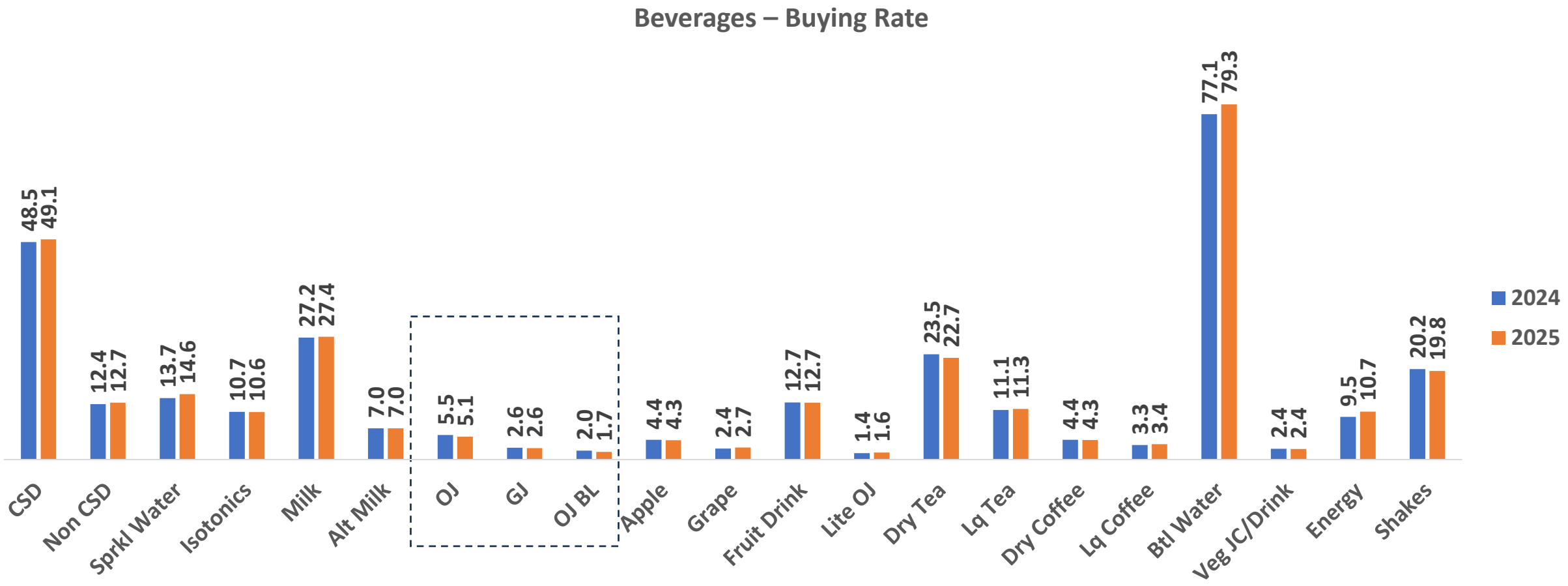
Beverages – HH Penetration (2025 vs. 2024)



Source: Nielsen HomescanTM data for Y/E Dec 2025

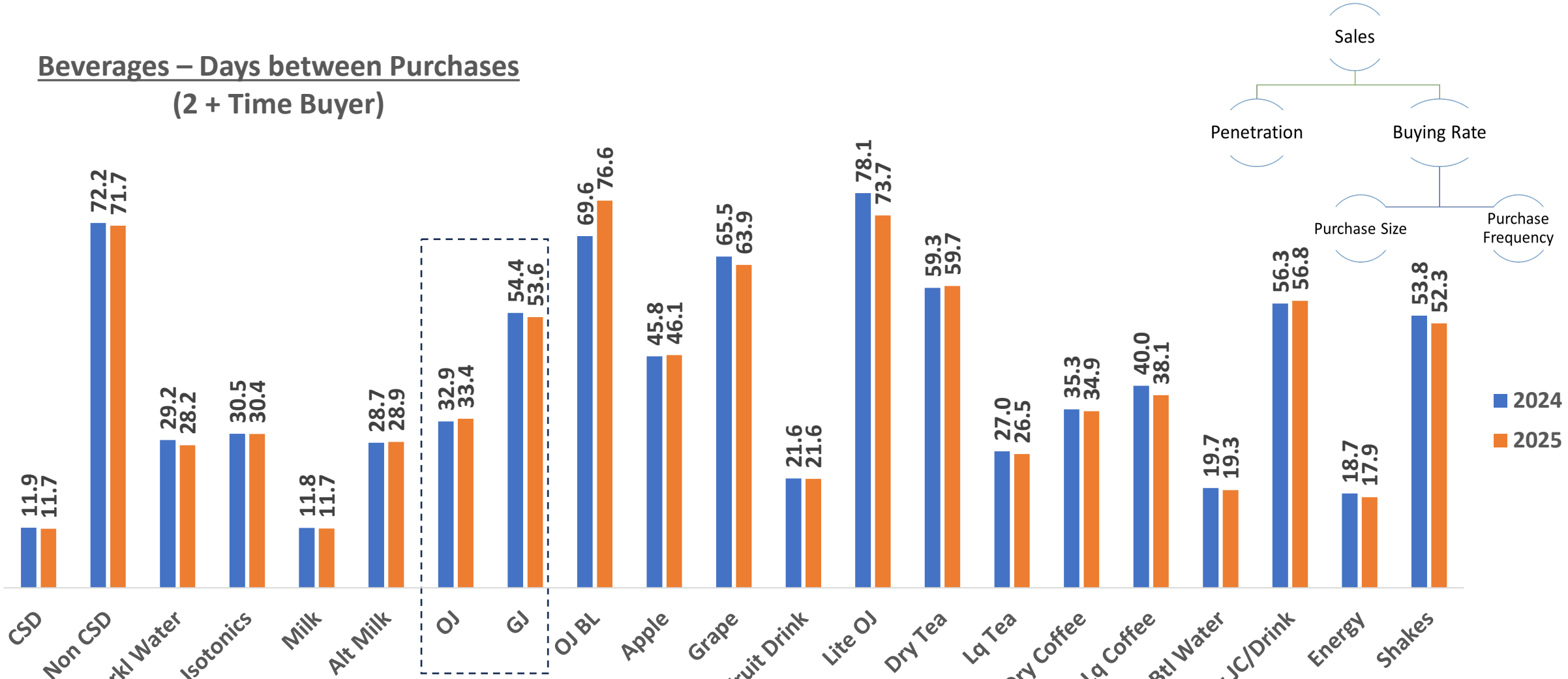
Household Buying Rate Trends

Beverages – HH Buying Rate (2025 vs. 2024)



Source: Nielsen HomescanTM data for Y/E Dec 2025

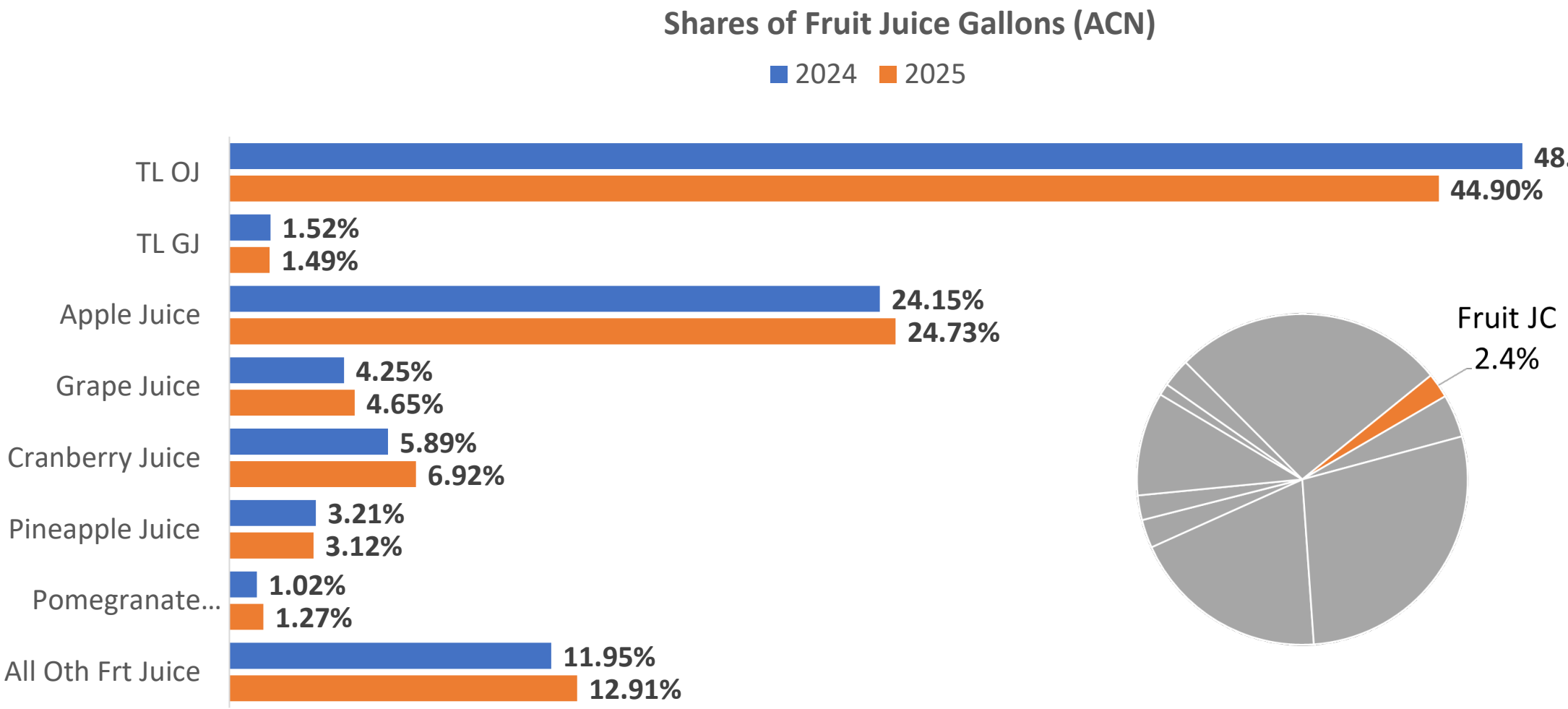
Purchase Frequency Trends (Repeat Buyers)



Source: Nielsen HomescanTM data for Y/E Dec 2025

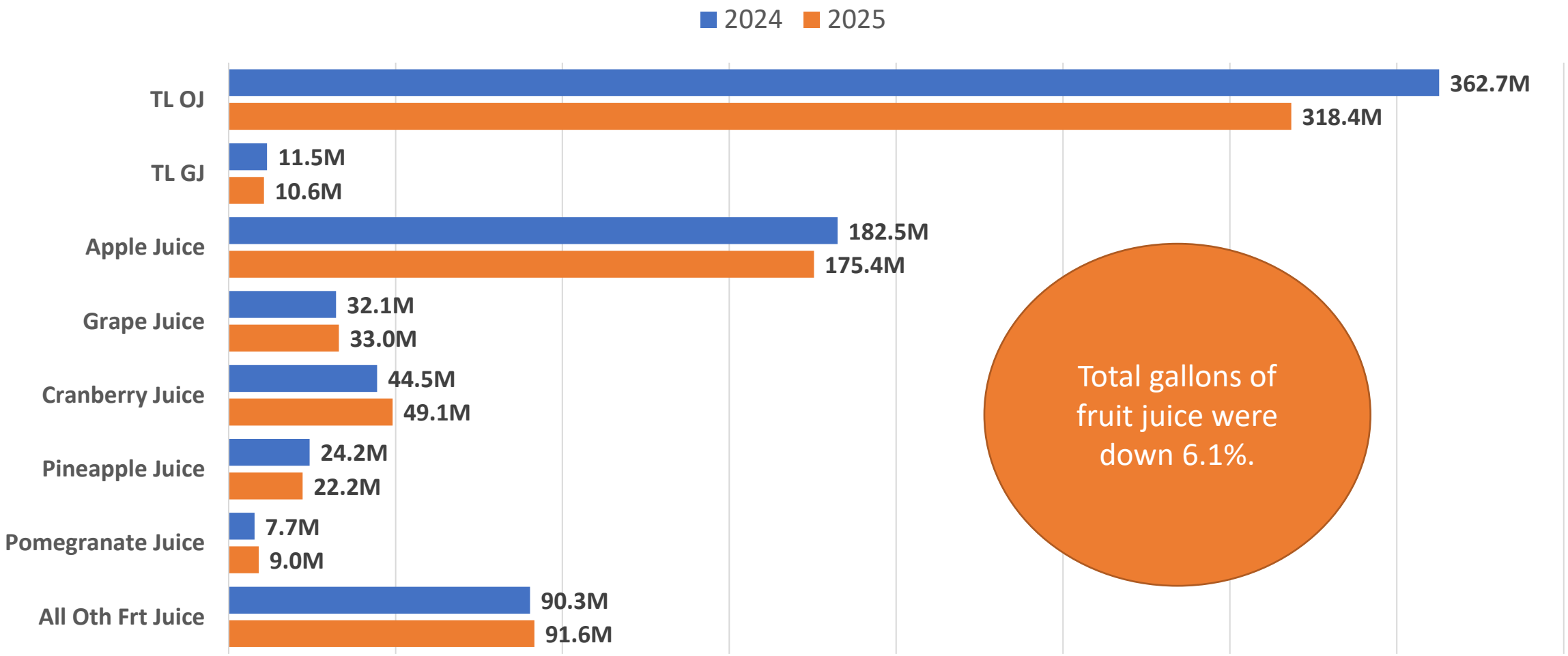
Fruit Juice Category Purchasing Overview

Total OJ share of the Fruit Juice Market down by 3.1%.



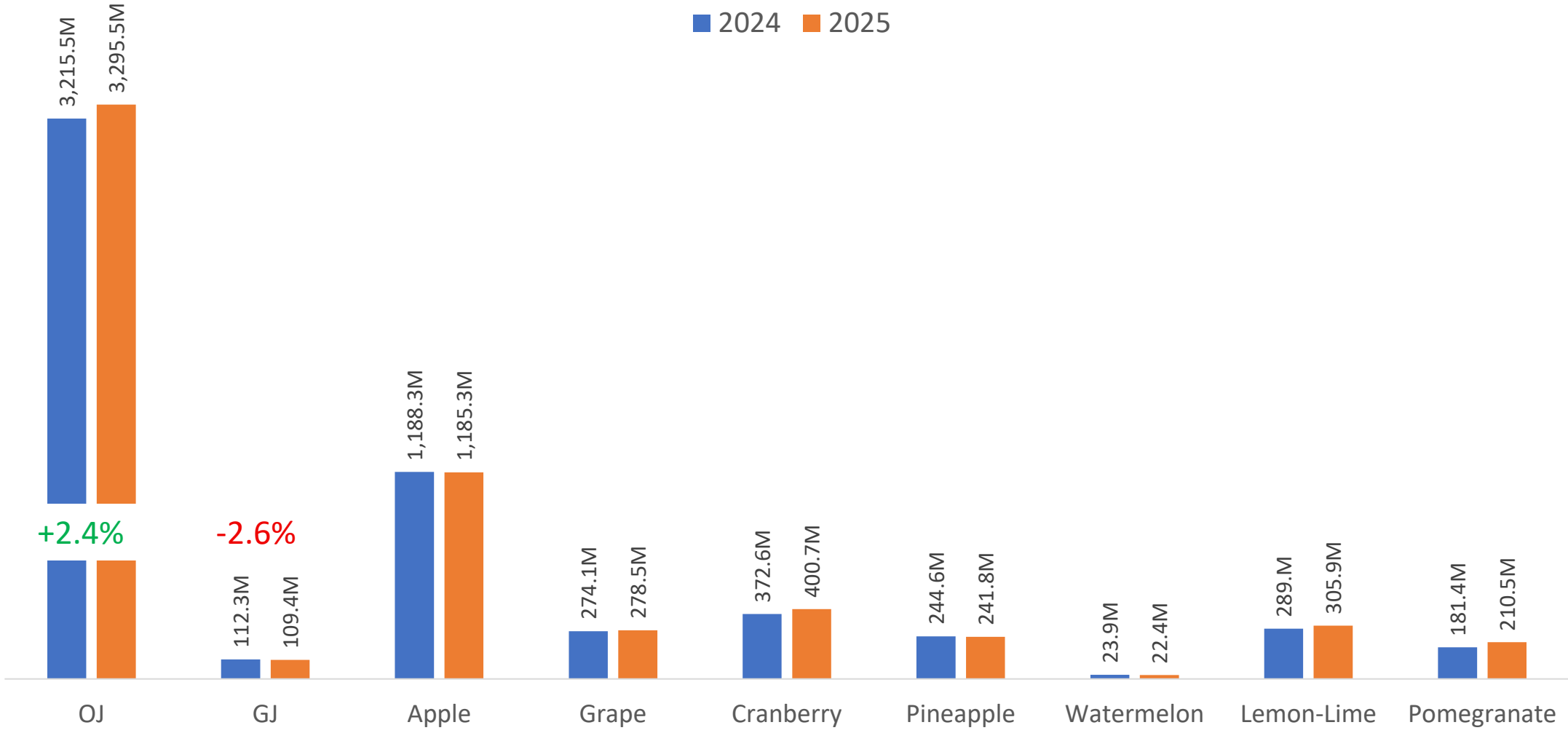
Source: Nielsen HomescanTM data for Y/E Dec 2025

Fruit Juice (in millions of gallons)



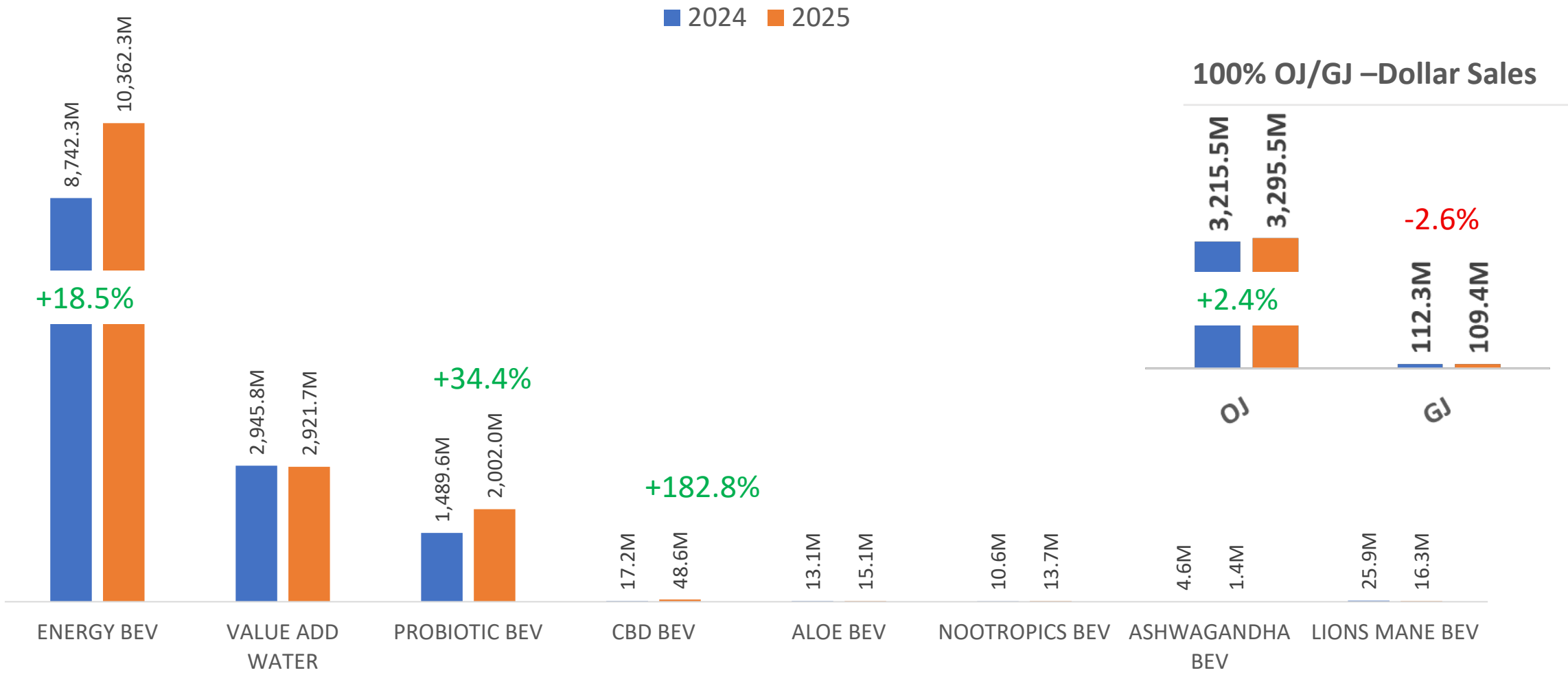
Source: Nielsen Homescan data for Y/E Dec 2025

100% Juice –Dollar Sales



Source: Nielsen Homescan data for Y/E Dec 2025

Functional Bev –Dollar Sales up 16%



Source: Nielsen Homescan data for Y/E Dec 2025

Consumer Perceptions in the Beverage Category

Economic and Market Research Department
Florida Department of Citrus
Presented to Florida Citrus Commission
March 2026

Data: OJ Consumer Tracker (monthly)

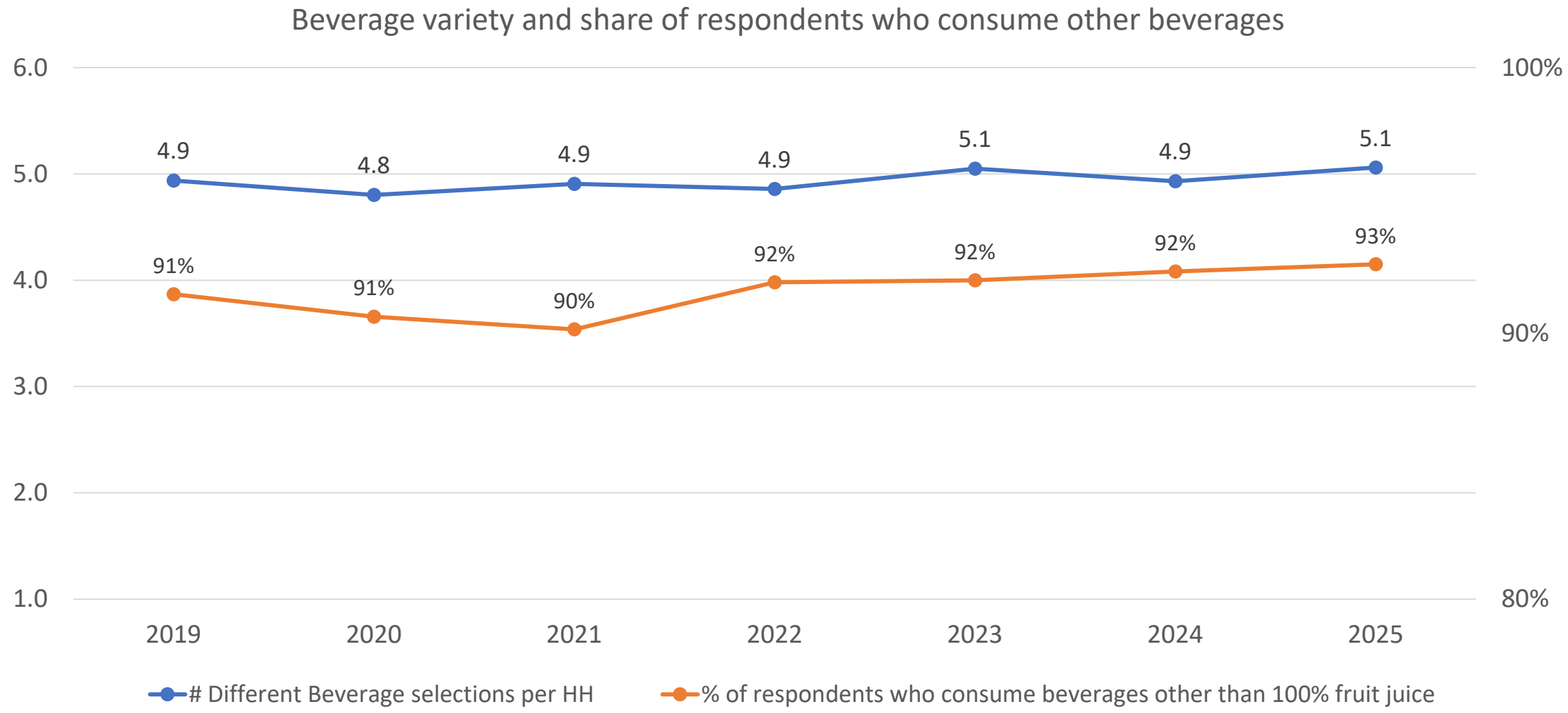
OJ Consumer Tracking Survey:

- Administered online using randomly drawn panel of participants through Toluna, USA; Monitored by UF-FAMRC
- 500 respondents per month
- Age 18+ years
- Demographically & geographically balanced to represent U.S. population
- Primary/shared grocery shopping responsibility

Current database:

- July 2016 through February 2026 (~59,300 plus observations)

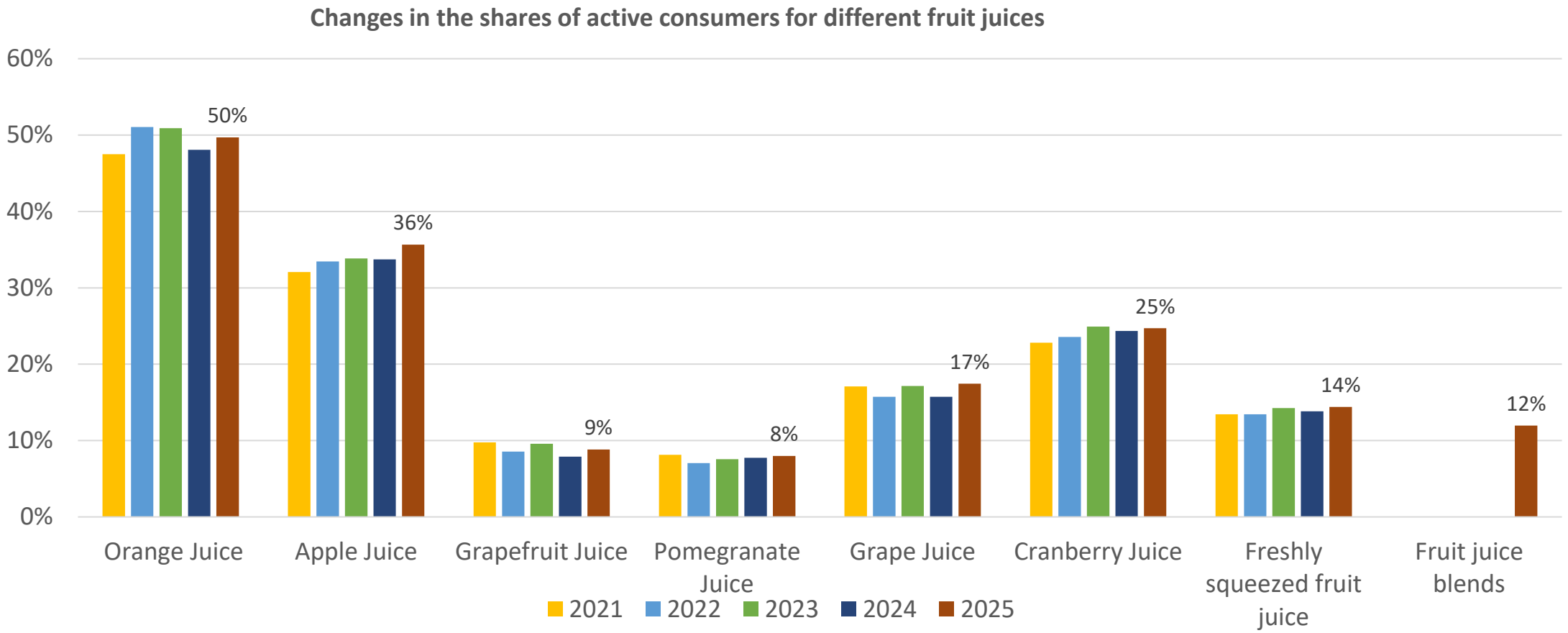
Relationship Between Beverage Variety and Consumer Consumption



*Data is January – December

Source: FDOC OJ Tracker – Managed by UF-FAMRC

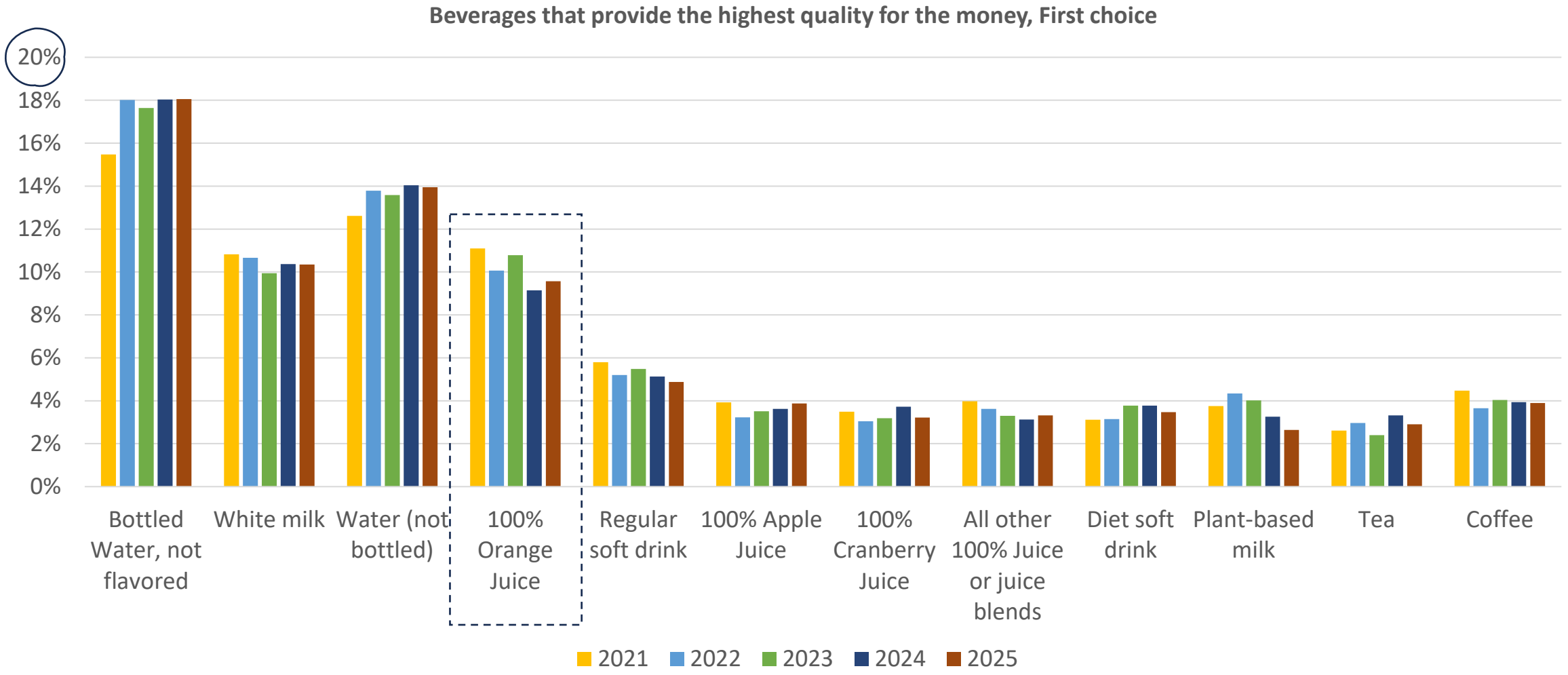
Juice Category: Average Monthly Market Penetration



QUESTION: Thinking about the last 30 days, please indicate if you bought any of the following 100% Fruit Juices. (Select all that apply)

*Data is January – December, “100% fruit juice blends” was added in June 2025.
Source: FDOC OJ Tracker – Managed by UF-FAMRC

High Value for Money: 100% Orange Juice Ranked Among Top Beverages

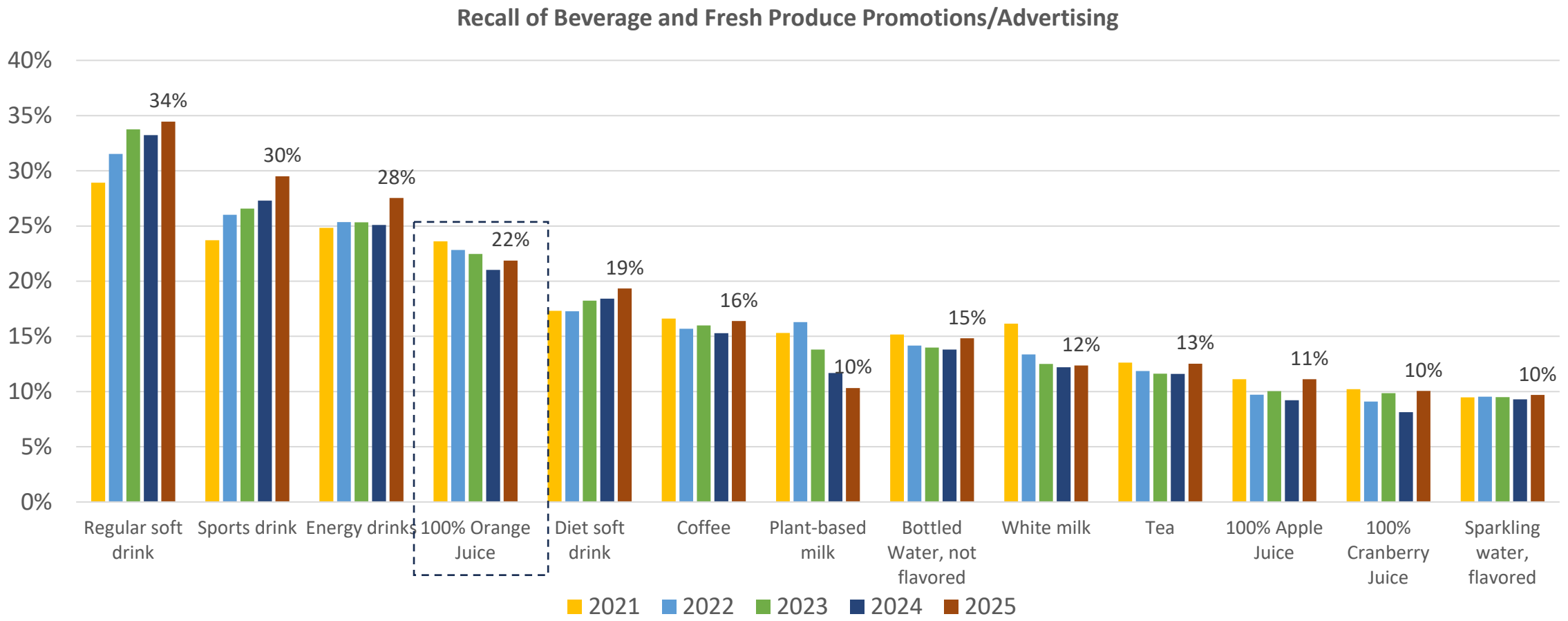


QUESTION: Of the following beverages, which do you feel provides the highest QUALITY for the money?

*Data is January – December

Source: FDOC OJ Tracker – Managed by UF-FAMRC

Recall of Beverage and Fresh Produce Promotions/Advertising : 100% Orange Juice Ranked Among Top Beverages



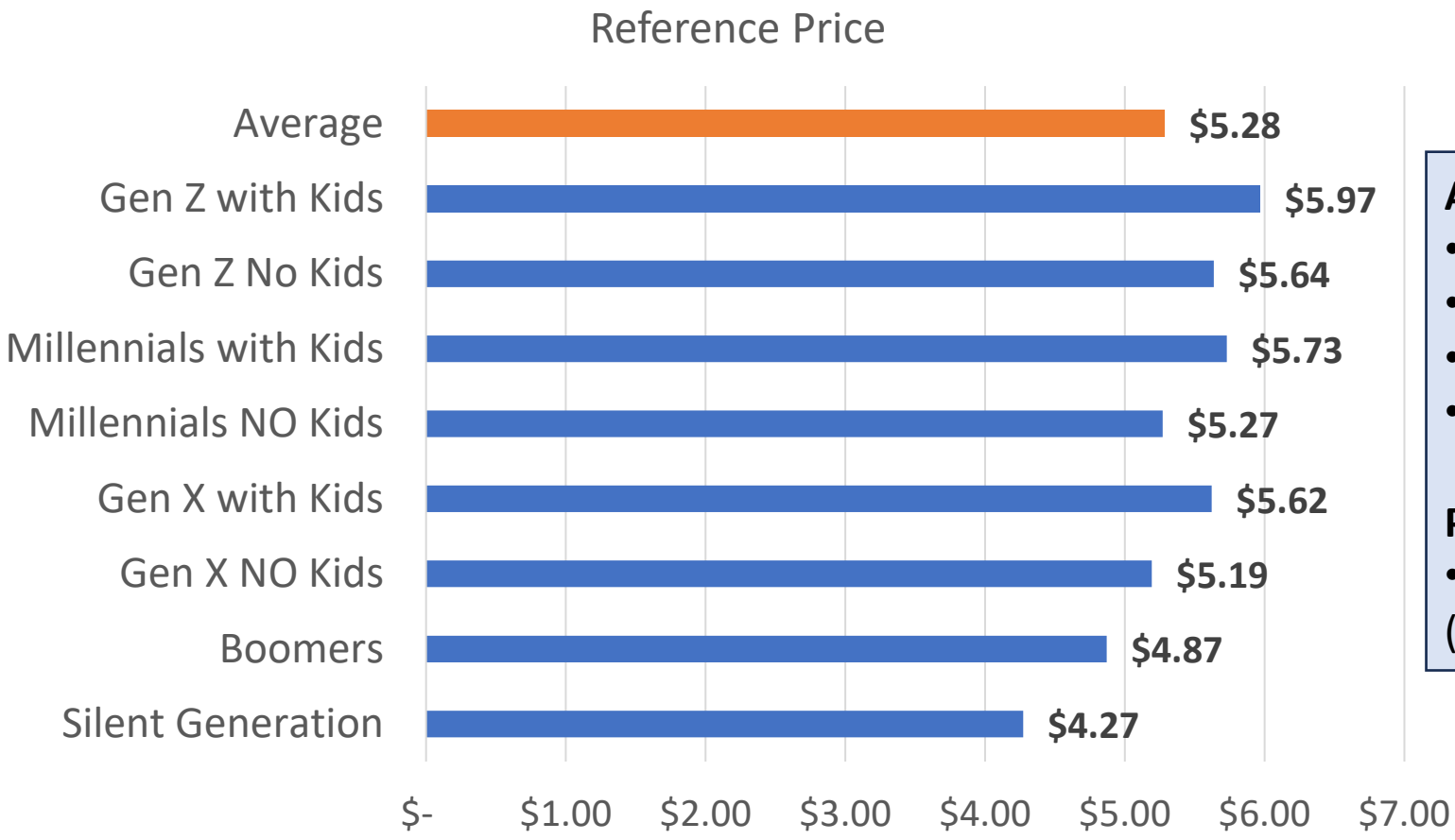
QUESTION: During the past 30 days, do you recall hearing or seeing any mention of promotion or advertisement for each of the types of beverages or fresh fruit/vegetable below from any sources.

*Data is January – December

Source: FDOC OJ Tracker – Managed by UF-FAMRC

Orange Juice Purchasing Behavior by Generation

OJ Tracker 2025 | n = 4,448 | Reference price for 46–52 oz refrigerated 100% OJ



Active OJ Consumers in 2025 – 48%

- Millennials: **62%**
- Gen Z: **53%**
- Gen X: **46%**
- Boomers: **37%**

Promotion Awareness

- Messaging resonates across generations (~21%) but higher in HH with kids

Question: Please indicate how much you usually pay to purchase a 46-52 oz. container of 100% orange juice, not-for -concentrate in the refrigerated section?

*Data is January – December

Source: FDOC OJ Tracker – Managed by UF-FAMRC

Key Takeaways: Demand Remains Steady Amid Supply Constraints

1. Supply Constraints Continue to Drive Prices
   - Retail price increases reflect limited orange supplies, not weakening demand.
   - NFC and Recon price convergence signals tight market conditions.
2. Consumers Still Value 100% Orange Juice
   - Dollar sales remain relatively stable amid higher retail prices.
   - FDOC OJ Tracker shows strong value perception.
3. The Category Still has Opportunities
   - Nutritional messaging remains highly relevant
   - Promotions continue to drive strong recall in the entire beverage category, even among younger households.

THEN	NOW	OPPORTUNITY
• Stable prices amid often surplus	• Supply shortages keeping retail prices higher	• Position OJ as the original wellness amid functional bev demand
• Strong HH penetration in Bev Category	• Dollar sales holding amid price increases	• Continue to promote to maintain visibility
• Clear retail NFC vs. Recon pricing	• Prices converging as supply tightens	• Engage younger HH for future production