Florida Citrus Outlook
2025-26 Season

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Florida Citrus Outlook
2025-26 Season

Introduction

This report provides supply and demand projections of Florida citrus for the 2025-26 season. On Monday, January 12, 2026, the USDA's National Agricultural Statistics Service (USDA/NASS) released the initial 2025-26 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. 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 January citrus forecast for the 2025-26 Florida citrus season is 13.60 million boxes, an estimated 2.2% decline in total Florida citrus production of oranges, grapefruit, and tangerines. The forecast for total U.S. citrus production for the 2025-26 season indicates production will decrease overall by 2.7% with a total of 120.35 million boxes of oranges, grapefruit, lemons, and specialty citrus from California, Florida, Texas, and Arizona. Specifically, the January forecast projects 58.40 million boxes of oranges, 7.70 million boxes of grapefruit, and 27.40 million boxes of specialty tangerines and tangelos. The USDA forecast also anticipates that California, Arizona, and Florida will produce 26.85 million boxes of lemons in the 2025-26 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 2024-25 Florida Citrus Season

The 2024–25 Florida citrus season is expected to face a sharp downturn following modest gains last year. Preliminary USDA/NASS estimates place total Florida citrus production at 13.85 million boxes, a 31.4% decline compared to 2023–24. The reduction reflects the continuing toll of HLB (citrus greening), the impact of hurricanes from preceding seasons on total acreage, and persistently low tree replanting rates.

Florida's round orange crop is preliminarily estimated at 12.2 million boxes, down 32.3% from last season's 18.0 million boxes. Early and mid-season varieties, including Navels, are estimated at 4.6 million boxes (–32%), while Valencia oranges are estimated at 7.6 million boxes (–32.6%). Processed utilization remains dominant, with about 91% of oranges expected to be crushed. Of this, 7.16 million boxes are preliminarily allocated for NFC juice (down 5.4 million boxes from last season), while 3.85 million boxes are estimated for FCOJ, a slight increase. Juice yields are expected to average 4.79 SSE gallons per box, slightly higher than last season.

Certified fresh orange shipments are preliminarily estimated at 0.97 million boxes, a 42.6% decline from 2023–24. Exports are expected to account for only 33,000 cartons, down nearly 77%, with Canada remaining the primary destination.

Florida grapefruit production is preliminarily estimated at 1.30 million boxes, a 27.4% decline from last season. Certified fresh shipments are expected at 0.87 million boxes, about 67%

[1] USDA National Agricultural Statistics Service, Florida Field Office. "Citrus Production January 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.

of the crop, while processed utilization is estimated at 0.38 million boxes (–35.8%). Nearly all processed grapefruit is expected to be used for NFC juice, though overall grapefruit juice availability will fall by nearly 20% year-over-year.

Specialty citrus production is preliminarily estimated at 400,000 boxes, down 50,000 boxes from last season. Certified shipments are expected to be 182,000 boxes, representing about 45% of the crop, nearly all sold in the domestic market.

Total U.S. citrus production is preliminarily estimated at 126.7 million boxes, a slight 0.9% decline. California production is expected to remain stable, while Florida's sharp reduction accounts for nearly all of the national decrease. Globally, combined orange production from the U.S., Brazil, and Mexico is estimated to fall 14.1% to 481.5 million 90-lb boxes, with São Paulo production down 27% due to poor fruit set and quality issues. Mexico's crop is expected to remain essentially flat, though more fruit continues to be diverted into processing as exports to the U.S. increase.

Aggregate orange juice availability across the top three suppliers (Brazil, Mexico, and the U.S.) is preliminarily estimated to decline 18% to 1.63 billion SSE gallons, intensifying global supply shortages. Brazil's NFC exports to the U.S. are expected to decline modestly, while NFC imports from Mexico remain crucial to balancing the U.S. market.[2]

The contraction in Florida citrus production will further strain industry infrastructure already weakened by years of declining acreage and production. On-tree revenues for oranges are preliminarily estimated at $158.9 million, down from $176.5 million in 2023–24, while grapefruit revenues are expected to fall 34% to $38.6 million. Specialty citrus, though small in volume, is preliminarily estimated at $15.4 million in revenues, offering slight stability.

[2] 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.

Overall, on-tree revenues for oranges, grapefruit, and specialty citrus are projected to decline by 15.6% from an estimated $252.4 million in the 2023-24 season to an estimated $212.9 million in 2024-25 season.

For Florida growers, the 2024–25 season underscores the urgency of accelerating tree replanting, investing in disease management, and bolstering marketing strategies to sustain consumer demand amid tighter supplies and rising retail prices. With orange juice retail prices already above $10.80 per gallon and showing no signs of relief, continued consumer education on the health and wellness benefits of citrus will be critical to maintaining demand.

Florida Orange Crop, Utilization and Movement

This section provides an overview of world orange production and utilization trends that may have an impact on the Florida citrus industry outlook during the 2025-26 season based on the most recent information. Table 1 provides estimates of the orange utilization and outlook of the world's 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 is expected to increase by 11.6% with the United States, Brazil, and Mexico expected to produce approximately a combined 463.2 million 90-lb equivalent boxes in the 2025-26 season.

Specifically, the United States is expected to produce 53.3 million 90-lb equivalent boxes, Brazil is expected to produce 330.0 million 90-lb equivalent boxes, and Mexico is expected to produce an estimated 79.9 million 90-lb equivalent boxes in the 2025-26 season. The data suggests that approximately 70.4% of production in these countries will be utilized for processing, which represents a projected 13.8% increase over last season. In terms of processed utilization, the remainder of this section examines utilization within key regions of each country.

Florida

The USDA/NASS January forecast for the 2025-26 Florida round orange crop is 12.00 million boxes, which would represent a decline of 1.6%, or equivalent to 0.2 million boxes compared to last season's crop of 12.2 million boxes. Table 2 reports Florida orange box utilization. The 2025-26 early and mid-season orange crop forecast, including Navel oranges, is 4.50 million boxes, down 0.10 million boxes (or a decline of 2.2%) from last season. The navel orange crop is forecasted at 50,000 boxes, representing 1.1% of the total early and mid-season orange crop estimate. The Valencia crop is forecasted at 7.5 million boxes, a projected 1.3% decrease over last season's Valencia production of 7.6 million boxes.[3]

This Outlook assumes approximately 90.8% of orange production will be utilized in the processed market. The number of round orange boxes directly used for single-strength orange juice (SSOJ), which is used to make not-from-concentrate (NFC) orange juice, is estimated at 7.09 million boxes (or 65.1% of total processed utilization) in the 2025-26 season, a decrease of 0.07 million boxes from last season. The quantity of orange boxes used in 2025-26 to produce FCOJ is estimated at 3.80 million boxes, a decrease of 0.05 million boxes compared to last season's utilization of 3.85 million boxes. Certified fresh orange shipments in 2025-26 are estimated at 1.03 million boxes, up 3.0% from the 1.00 million boxes shipped last season. Florida's processed orange utilization is estimated at 10.89 million boxes, a decrease of 1.1% compared to last season's utilization of 11.01 million boxes.

The total juice yield for Florida processed production is roughly estimated to be 4.674 SSE gallons per box for the 2025-26 season based on an evaluation of currently available production

[3] One Florida orange box weighs 90-lb.

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 majority of production reaching markets in North America, Europe, and Asia. Orange juice production in the State of São Paulo and the West-Southwest Minas Gerais citrus belt, where most of Brazil's oranges for processing are grown, increased by roughly 36% over the previous season, from 230.9 million 90-lb equivalent boxes to 314.6 million 90-lb equivalent boxes, representing an increase of 83.7 million boxes. The increase in production and beginning inventories were a leading factor in the overall increase in global OJ availability in the current season. 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 5.248 SSE gallons per box for the 2025-26 season based on an evaluation of currently available production and movement data. 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 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 USDA/FAS production, supply, and demand data and are to be considered approximations. Orange production in Mexico increased by roughly 32.0% over the previous season, from 60.5 million 90-lb equivalent boxes to 79.9 million 90-lb equivalent boxes, representing an increase of 19.4 million boxes. Processed orange production in Mexico is expected to increase by as much as 32% over last season due to favorable weather conditions, from 28.4 million 90-lb equivalent boxes to 37.6 million 90-lb equivalent boxes, an increase of 9.1 million boxes. The estimates for the Mexico orange crop are based on the most current data reported by USDA/FAS and are found in Table 3.

The juice yield for Mexico production is roughly estimated to be 4.415 SSE gallons per box for the 2025-26 season and is based on an evaluation of currently available production and movement data provided by USDA/FAS. However, it is important to note that the juice yield has not fluctuated in recent years, 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 were intended for the fresh market. However, in recent years, the processed share has increased. During the 2022-23 season, California fresh utilization was estimated at 76% and Texas utilization was

estimated at 75%, with the remainder going into processed. During the 2023-24 season, California fresh utilization was estimated at 64% with Texas fresh utilization hovering around 63%, with the remainder going into processed. During the 2024-25 season, California fresh utilization was estimated at 77% with Texas fresh orange utilization at 79%.

According to the USDA/NASS citrus production forecast for the 2025-26 season, California is expected to produce 38.0 million 80-lb boxes of non-Valencia type oranges and 7.5 million 80-lb boxes of Valencia oranges for a total of 45.5 million boxes of oranges, an increase of 0.7% over the previous season. As many as 12.6 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 2025-26 season is estimated to increase by 5.9% to 900,000 85-lb boxes. The Texas crop share into processed utilization could represent as many as 258,892 85-lb boxes. This analysis estimates that as many as 11.5 million 90-lb Florida equivalent boxes of California and Texas combined production may be used in processing orange juice. The share of single-strength and concentrate is not reported by either state. This analysis projects that orange juice production may increase by approximately 21.4% from an estimated 41.9 million SSE gallons of orange juice in the 2024-25 season to 50.9 million SSE gallons in the 2025-26 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 2025-26 Florida season, the estimated total supply of orange juice on the world market is projected to increase by 35.1% over the previous period, from 1.22

billion SSE gallons to 1.64 billion SSE gallons due to production from leading suppliers such as São Paulo (Brazil), Mexico, and the United States (Table 5). Florida production is expected to contribute 3.1% of orange juice to this total supply this season.

Global trade continues to respond to supply constraints despite increases in inventory levels and supplies. Elevated beginning inventories and increased production in Brazil serve as a cushion rather than a sign of surplus and slumping global demand. OJ inventory levels in the Brazil and the U.S. help to meet current demand, particularly given that combined availability entering the Florida season remained below historical norms. While Mexico also remains an important supplier of OJ to the U.S. market, the extent to which Mexican processors hold consistent multi-year inventories is unclear without official reporting structures. In recent years, Brazil and Mexico have become key sources of NFC for the U.S. market, contributing to substitution away from FCOJ during periods of tight supply. More recently, fluctuating FCOJ futures prices have sparked uncertainty on the Florida production landscape where NFC availability remains constrained. Taken together, these dynamics reinforce that increases in Brazil's production or beginning stocks levels in Florida do not necessarily translate into looser market conditions. Global orange juice inventories remain below levels typically associated with comfortable availability.

Comparisons of orange juice beginning inventories and production levels for Florida, Brazil, and Mexico are provided in Table 6. Aggregate OJ availability from the three leading suppliers in 2025-26 is projected at 2.08 billion SSE gallons, an increase of 534.6 million SSE gallons (or up 34.5% from last season's 1.55 billion SSE gallons). World orange juice production must also consider world demand for orange juice stocks as the United States is only one market for the leading suppliers. While the vast majority of U.S. orange juice production is consumed domestically, Brazil 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 1.09 billion SSE gallons of OJ were exported from Brazil in 2024-25, down 22.7% from the 1.42 billion SSE gallons exported in 2023-24. Most of Brazil's orange juice exports are bound for Europe, with shipments to Europe during the 2024-25 season estimated at 555.0 million SSE gallons (representing approximately 51% of all exports), an estimated 25.6% decline over the previous season. The majority of Brazil's exports to Europe are frozen concentrate, representing 70% of the total in 2024-25, 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 also down by 54.2% with 76.0 million SSE gallons. Brazil's exports to North American (USMCA) countries were down by -3.4% with 436.8 million SSE gallons, primarily intended for the U.S. market. A declining share, approximately 39%, of these exports in the 2024-25 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.

Table 8 provides a summary of U.S. imports of orange juice by origin and type. For FCOJ, imports through Florida Ports increased from 198.69 million gallons in the 2023-24 season to 205.48 million gallons in the 2024-25 season, representing an increase of 6.79 million gallons. Similarly, imports from Brazil increased from 79.80 million gallons to 137.85, showing an increase of 58.05 million gallons. On the other hand, imports from Mexico decreased from 99.97 million gallons to 53.77, representing a reduction of 46.20 million gallons. In total, FCOJ imports declined from 276.87 million gallons in 2023-24 to 272.28 million gallons in 2024-25, indicating a decrease

of 4.59 million gallons. For NFC OJ, imports through Florida Ports declined from 220.15 million gallons in the 2023-24 season to 203.17 million gallons in the 2024-25 season, indicating a decline of 16.97 million gallons. Imports from Brazil, which is a significant contributor to NFC OJ imports, also fell from 207.54 million gallons to 191.76, representing a decrease of 15.78 million gallons. In total, NFC OJ imports decreased from 261.66 million gallons in 2023-24 to 246.11 million gallons in 2024-25, indicating a reduction of 15.55 million gallons.

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 fluctuation in global supplies. Inventory levels measured at the beginning of each season can rise or fall year-over-year without indicating a surplus or shortage market situation. When availability is tight in prior seasons, processors may draw from existing inventories or adjust movement patterns to ensure continuity. For example, the 2024-25 season saw an increase in orane juice drinks blended with other fruit juices, concentrates, and sweeteners. Concurrently, consumer demand for 100% 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 OJ availability from Florida, Brazil, and

Mexico, and are adjusted for Florida processor trends. Three scenarios for 2025-26 are provided, varying with respect to Florida processor imports.

The 2024-25 Florida citrus season concluded with a year-over-year increase in combined SSOJ and FCOJ inventories from the previous season. Combined Florida OJ ending inventory for the 2024-25 season is 194.9 million SSE gallons or 20.8 weeks of supply, compared to 15.9 weeks in the previous 2023-24 season. Adding the 2024-25 ending inventory to the 2025-26 estimate of Florida OJ production of 50.9 million SSE gallons, plus estimated imports and other adjustments totaling 464.6 million SSE gallons, Florida's OJ availability in 2025-26 (October 2025 through September 2026) is estimated at 710.4 million SSE gallons, up 14.8 million SSE gallons (or 2.1%) from last season's level. Total movement in 2025-26 is estimated to decline by 63.8 million SSE gallons (or 12.7%) to 437.0 million SSE gallons from last season. By the end of the 2025-26 season, Florida's OJ ending inventory is estimated to increase to 273.5 million SSE gallons (or 32.5 weeks of supply).

Import quantities will most likely be influenced by pre-existing contracts, actual production, movement, and availability from non-Florida sources observed during the 2025-26 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 230.6 million SSE gallons (27.4 weeks supply) to 316.3 million SSE gallons (37.6 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 34.9% of Florida processed orange utilization was processed as FCOJ during the 2025-26 season. Beginning Florida processor inventories of FCOJ for the 2025-26 season totaled 120.9 million SSE gallons.an increase of 68.2% compared to the

previous season. Florida processor FCOJ production is estimated at approximately 17.2 million SSE gallons based on an estimated utilization of 3.80 million boxes of round oranges and an average FCOJ juice yield of 4.53 gallons per box in 2025-26 season. Imports of FCOJ, which is used to make Recon, shelf-stable, and frozen orange juice, are projected to decrease by 15.3% to 191.8 million SSE gallons. Total overall FCOJ availability is projected to increase by 4.0% when compared to the 2024-25 season. Total movement is projected to decline by at least 12.3% this season. Based on the estimated utilization, receipts, and movement trends, FCOJ ending inventories are projected to increase by the end of the season to approximately 161.4 million SSE gallons (or 44.7 weeks of supply).

This analysis assumes that approximately 65.1% of Florida processed orange utilization during the 2025-26 season will be processed as SSOJ, which is used for NFC orange juice. At the onset of the 2025-26 season, beginning Florida processor inventories of SSOJ were 74.0 million SSE gallons (14.3 weeks supply), a decrease of 21.1% when compared to the previous season. Florida processor SSOJ production is estimated at approximately 33.7 million SSE gallons based on an estimated utilization of 7.09 million boxes of round oranges and an average juice yield of 4.75 SSE gallons per box, which would be a decrease of 3.6% compared to the pack last season. Imports and domestic receipts of SSOJ are projected to increase by 19.3% to 236.5 million SSE gallons. Total overall SSOJ availability is projected to increase by 4.5% when compared to the 2024-25 season. Total movement, including EVAP into Recon, is projected to decline by at least 8.5% with a majority of SSOJ consumed through retail channels. Based on the estimated utilization, receipts, and movement trends, SSOJ ending inventories are projected to increase by the end of the season to approximately 107.2 million SSE gallons (or 24.2 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 554.6 million SSE gallons for the 2025-26 season, a projected decline of 1.7% from an estimated 564.3 million SSE gallons consumed in the previous season (Table 12). The projected reduction in consumption primarily reflects supply-side constraints and changes in distribution channels. Total U.S. orange juice production is estimated at 101.3 million SSE gallons based on the preliminary USDA estimate for the orange crop in Florida, California, and Texas (NASS/USDA, 2026a). Total U.S. orange juice imports are projected at 558.9 million SSE gallons, a projected increase of 4.5% over the previous season. U.S. exports are projected at 29.3 million SSE gallons, a 23.4% 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 2025-26 Florida citrus season, Florida orange production is projected to account for 11% of SSOJ and 8% of FCOJ receipts by processors, respectively. Specifically, Florida processors are expected to receive 33.7 million gallons of SSOJ from Florida production and 270.4 million gallons from other sources. Florida processors are expected to receive 18.2 million gallons of FCOJ from Florida's orange crop with a remaining 214.6 million gallons from other sources. Between 95 and 97 percent of SSOJ movement from Florida processing facilities is in the form of packaged goods, whereas the majority of FCOJ movement occurs as bulk movement for packaging out of state. It is estimated that between 63-68% 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 2025-26 season is largely dependent upon juice availability, market growth/ contraction, current rates on inflation affecting retail prices, and substitutes for OJ not yet known. In forecasting orange juice sales, it is assumed that consumer behavior during 2025 will continue into the 2025-26 season, despite ongoing concerns over high inflation. 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.[4]

Overall retail prices are projected to increase in all three scenarios for the 2025-26 season. Scenario 1 (middle or base price): the overall retail OJ price is projected to change from $10.95 per SSE gallon in 2025-26 to $11.58 per SSE gallon in 2024-25, a 5.8% increase in the average retail price. At this price level, orange juice sales within Nielsen retail outlets are projected to total approximately 260.7 million equivalent gallons, representing a 9.2% decline in volume compared to the previous season. In addition to its own-price elasticity, the demand for OJ depends on levels of OJ advertising and promotion, consumer income, attitudes and perceptions, and competition from other beverages through their prices and advertising and promotion levels, as well as other factors.

Scenario 2 (high price): the average retail OJ price is projected to increase from $10.95 per SSE gallon in 2024-25 to $12.04 per SSE gallon in 2025-26, a 10.0% increase in retail price. At this price level, orange juice sales within Nielsen retail outlets are projected to total approximately 245.8 million equivalent gallons, representing a 14.3% decline in volume compared to the previous season.

Scenario 3 (low price): the average retail OJ price is projected to increase from $10.95 per SSE gallon in 2024-25 to $11.12 per SSE gallon in 2025-26, a 1.5% increase in retail price. At this price level, orange juice sales within Nielsen retail outlets are projected to total approximately 272.5 million equivalent gallons, representing a 5.1% decline in volume compared to the previous season.

[4] 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 preceding estimates represent a 65% NFC market share of total OJ category retail sales volume, RECON market share estimated at 28% of total retail OJ sales volume, Frozen OJ market share estimated at 3% of total retail OJ sales volume, and a remaining 2% share allocated to Shelf Stable OJ. 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

Orange juice that is sold on trade promotion at retail has been at historically low levels the last couple of years, contributing to the increase in the average price. The share of orange juice sold on promotion with corresponding price per equivalent gallon is reported in Table 15. 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 features 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).

Table 15 summarizes retail orange juice promotions across multiple store formats, including grocery stores, mass merchandisers, and other outlets. During the 2024-25 season, promotional activity for NFC orange juice accounted for 22.5% of total sales, which is a decrease from 29.5% in the 2023-24 season. Recon orange juice saw promotional activity at 22.9% of total sales in 2024-25, compared to 22.2% in the previous season, indicating a slight change. Overall, total promotional sales represented 21.8% of all orange juice sales during 2024-25, compared to 26.0% in 2023-24. For orange juice sold without promotions, NFC sales were at 77.5% of total sales in 2024-25, compared to 70.5% in the previous season. Recon orange juice accounted for 77.1% of non-promotional sales in 2024-25, which is slightly lower compared to 77.8% in 2023-24. Total non-promotional sales decreased from 74.0% in 2023-24 to 78.2% in 2024-25. The average price for NFC orange juice sold on promotion increased from $9.44 per SSE gallon in 2023-24 to $10.51 in 2024-25. Recon orange juice sold on promotion had an average price of $8.52 in 2024-25, compared to $7.41 in 2023-24. For non-promotional sales, NFC orange juice was priced at $12.15 per SSE gallon in 2024-25, compared to $10.88 in the previous season, while Recon prices changed from $8.11 to $9.56 per SSE 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 8.6% of total orange production during the 2025-26 season. Certified fresh orange shipments in 2025-26 are estimated at 1.03 million boxes (equivalent to 2.07 million cartons), which would be an increase of 3.0% from the 1.00 million boxes (equivalent to 2.01 million cartons) shipped last season despite the overall decline in Florida orange production in the 2024-25 season. Domestic fresh orange shipments are projected at 2.03 million cartons, up by 58,733 cartons. The domestic share is projected to be about 98% of all

Florida fresh orange shipments in 2025-26. Florida packers are projected to export 34,431 cartons of fresh oranges during the 2025-26 season, representing an increase of 3.0% compared to last season. Accounting for 69% of all exports, Canada was the leading destination of Florida fresh oranges.

Florida Grapefruit Crop, Utilization and Movement

The USDA/NASS January estimate of the Florida grapefruit crop in 2025-26 is 1.20 million boxes, a decrease of 7.7% from last season's crop of 1.30 million boxes (Table 17). Florida grapefruit production has suffered losses of more than 95% since the 2007-08 season due to the harmful impacts of hurricanes and HLB. Certified fresh grapefruit shipments are estimated to be 828,000 boxes in 2025-26, which would represent a decline of about 5% compared to certified fresh utilization last season. Non-certified fresh utilization is forecasted at roughly 17,000 boxes in 2025-26. Processed utilization is projected to account for approximately 29% of the total crop and is estimated at 348,000 boxes, a decline of about 7.8% compared to the 2024-25 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 as much as 99% of processed utilization with an estimated 0.35 million boxes used this season, which represents a decrease of about 7.8% compared to last season. Utilization of the processed grapefruit crop into frozen concentrated grapefruit juice (FCGJ) is estimated at less than 2,000 boxes in 2025-26.

Florida Grapefruit Juice Inventory and Movement

Florida processors began the 2025-26 season with 4.92 million SSE gallons of GJ in inventory (25.0 weeks supply), down from the previous season's level of 6.57 million SSE gallons (28.8 weeks supply based on average movement at that time) (Table 18). Combined GJ production

plus processor imports, both domestic and foreign, in 2025-26 is estimated at 6.80 million SSE gallons, down 0.13 million SSE gallons from last season. Combining production with beginning inventories, GJ availability in 2025-26 is estimated at 11.7 million SSE gallons, down by 13.3% and representing a decrease of 1.79 million gallons from last year. GJ movement in 2025-26 is estimated at 7.77 million SSE gallons, down 21.5% from last year. The 2025-26 ending inventory for Florida GJ is estimated at 3.95 million SSE gallons (or 26.4 weeks supply). Table 18 also describes the availability, movement, and inventory estimates for FCGJ and single-strength grapefruit juice (SSGJ) projected for the 2025-26 season.

Florida processors are projected to utilize 99.4% of processed grapefruit for SSGJ (or GJ NFC). Beginning inventory of SSGJ for the 2025-26 season is down by 22.9% over the previous season at 3.30 million SSE gallons (19.59 weeks supply). Production from Florida fruit is estimated at 1.60 million SSE gallons based on an estimated 0.35 million boxes of grapefruit and a juice yield of 4.627 SSE gallons per box, representing a 23.8% decrease in pack from fruit over the previous season.

Total availability of Florida FCGJ in the 2025-26 season is projected at 2.56 million SSE gallons, which represents a decline of 7.2% compared to the 2024-25 season. Beginning inventories are expected to decline from 2.30 million SSE gallons to 1.62 million SSE gallons in 2025-26, indicating continued tightness in carryover stocks. At the same time, imports are projected to increase to 1.33 million SSE gallons from 1.01 million SSE gallons in the prior season, helping to offset reduced production from Florida fruits and strained inventories. Despite the rise in imports, ending inventories for the 2025-26 season are expected to tighten to 1.16 million SSE gallons compared to 1.62 million SSE gallons in 2024-25.

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 14.50 million SSE gallons in 2025-26, compared to 16.59 million SSE gallons in the previous season (Table 19). Disappearance is expected to decline by 13% between the 2024-25 season and the 2025-26 season but 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 12.38 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 2025-26 season is consistent with the decline in availability coupled with declining market growth. Total U.S. GJ imports are estimated at 6.66 million SSE gallons, a decrease of 2% over the previous season. U.S. exports are projected at 4.46 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 2025-26 season, California is expected to produce 4.30 million 80-lb boxes of grapefruit, which would be an increase of 4.9% compared to the previous season. As many as 1.57 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 2025-26 season is estimated to increase by 10.0% to 2.20 million 80-lb boxes. The Texas crop share into processed utilization could represent as many as 0.90 million 80-lb boxes. This analysis estimates that as many as 2.33 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 6.2% from an estimated 10.2 million SSE gallons of orange juice in the 2024-25 season to 10.8 million SSE gallons in the 2025-26 season.

In addition to GJ prices, retail GJ sales during the 2025-26 season will be largely dependent on availability, overall market growth or contraction, and the presence of substitutes. Retail sales are estimated assuming that recent consumer purchasing patterns continue into the 2025-26 season. Estimates with a sensitivity analysis are provided for three price scenarios (Table 20).

Scenario 1 (middle or base price): the overall retail GJ price is projected to change from $11.89 per SSE gallon in 2024-25 to $12.55 per SSE gallon in 2025-26, a 5.6% increase in the average retail price. At this price level, orange juice sales within Nielsen retail outlets are projected to total approximately 8.4 million equivalent gallons, representing a 9.6% decline in volume compared to the previous 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 their prices and advertising and promotion levels, as well as other factors.

Scenario 2 (high price): the average retail GJ price is projected to increase from $11.89 per SSE gallon in 2024-25 to $13.05 per SSE gallon in 2025-26, a 9.8% increase in retail price. At this price level, orange juice sales within Nielsen retail outlets are projected to total approximately 8.0 million equivalent gallons, representing a 13.5% decline in volume compared to the previous season.

Scenario 3 (low price): the average retail GJ price is projected to increase from $11.89 per SSE gallon in 2024-25 to $12.05 per SSE gallon in 2025-26, a 1.4% increase in retail price. At this price level, orange juice sales within Nielsen retail outlets are projected to total approximately 8.8 million equivalent gallons, representing a 5.4% decline in volume compared to the previous season.

Estimates of sales by segment (NFC, RECON, FCGJ, and Other Types of GJ) are also shown in the table. Retail prices for NFC, RECON, FCGJ, and Other GJ (mostly Shelf Stable) are projected to increase in all scenarios for the 2025-26 season. The preceding estimates represent a 69% NFC market share of total GJ category retail sales volume, RECON market share estimated at 2% of total retail GJ sales volume, Frozen GJ market share estimated at 0% of total retail GJ

sales volume, and a remaining 28% share allocated to Shelf Stable GJ.

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. Table 21 summarizes retail grapefruit juice promotions across multiple store formats, including grocery stores, mass merchandisers, and other outlets. During the 2024-25 season, promotional activity for NFC grapefruit juice accounted for 30.5% of total sales, which is the same as the 30.5% in the 2023-24 season. Recon grapefruit juice saw promotional activity at 11.2% of total sales in 2024-25, compared to 12.7% in the previous season, indicating a slight change. Overall, total promotional sales represented 24.3% of all grapefruit juice sales during 2024-25, compared to 25.1% in 2023-24. For grapefruit juice sold without promotions, NFC sales were at 69.5% of total sales in 2024-25, compared to 69.5% in the previous season. Recon grapefruit juice accounted for 88.8% of non-promotional sales in 2024-25, which is slightly lower compared to 87.3% in 2023-24. Total non-promotional sales decreased from 74.9% in 2023-24 to 75.7% in 2024-25. The average price for NFC grapefruit juice sold on promotion increased from $9.54 per SSE gallon in 2023-24 to $10.55 in 2024-25. Recon grapefruit juice sold on promotion had an average price of $10.56 in 2024-25, compared to $10.25 in 2023-24. For non-promotional sales, NFC grapefruit juice was priced at $13.52 per SSE gallon in 2024-25, compared to $11.93 in the previous season, while Recon prices changed from $8.82 to $9.10 per SSE 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 69% of total grapefruit production during the 2025-26 season. Certified fresh grapefruit shipments in 2025-26 are currently estimated at 0.83 million boxes (equivalent to 1.66 million cartons), which would represent a decline of 5.0%

compared to last season. Domestic fresh grapefruit shipments are projected at 1.58 million cartons, which would represent a decline of 4.6% compared to last season. The domestic share has increased in recent years from around 42% annually to a 96% share of all Florida fresh grapefruit shipments. Export shipments are projected at 74,520 million cartons of fresh grapefruit during the 2025-26 season, representing a decline of 12% compared to last season. Certified Florida fresh exports represent 5% of fresh shipments. Florida fresh grapefruit will be shipped to various export markets in Asia, Europe, and Canada. Accounting for an estimated 9,647 cartons, the top markets for Florida certified fresh grapefruit are Japan and Korea (ROK). Europe is projected to receive approximately 14,365 cartons of fresh Florida grapefruit, and Florida fresh packers are expected to ship approximately 50,508 cartons to Canada, accounting for 3% of total exports and 7% decline compared to the previous season.

Florida Specialty Crop and Utilization

The USDA/NASS January estimate of the Florida specialty crop in 2025-26 is 400,000 boxes, unchanged from last season (Table 23). Despite higher FOB prices in recent years, specialty production has declined more than 93% since the 2006-07 season. The USDA/NASS preliminary 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-midseason oranges between the 2005-06 and 2015-16 seasons.

Florida certified shipments are estimated to be about 45% of the crop with an estimated 181,000 boxes (equivalent to 363,000 cartons) moving during the 2025-26 season to primarily the domestic market (Table 24). The domestic share typically represents close to 97% of annual shipments. Florida packers are projected to export approximately five to six thousand cartons of

Florida fresh specialty fruit during the 2025-26 season. At an estimated 75% of exports, Canada would be the leading destination of Florida fresh specialty.

Summary: Implications for the Florida Grower

The USDA/NASS January citrus forecast is the initial release of the 2025-26 Florida citrus season following the federal government shutdown in the Fall of 2025. Data indicates total Florida citrus production of 13.60 million boxes, a 2.2% decline from last season. Total U.S. citrus production is forecast at 120.35 million boxes, down 2.7%, consisting of 58.40 million boxes of oranges, 7.70 million boxes of grapefruit, and 27.40 million boxes of specialty tangerines and tangelos.

The USDA/NASS January forecast for the 2025-26 Florida round orange crop is 12.0 million boxes, a slight 1.6% decline from last season. Approximately 90.8% of Florida oranges are expected to go to processing, with an estimated 7.09 million boxes utilized for NFC and 3.80 million boxes for FCOJ. While Florida remains a relatively small contributor to global orange juice supplies by volume, Florida's processing infrastructure and the domestic served remain closely tied to global availability. Orange juice production among the three major suppliers (Brazil, Mexico, and the United States) is projected to increase 32% to 2.05 billion SSE gallons, driven primarily by higher beginning stocks and increased production from Brazil.

Global trade is still operating under supply-constrained conditions, and elevated beginning inventories in Florida and increased production in Brazil are functioning as a cushion rather than signaling surplus or weak demand. Even with Brazil and Mexico supplying more NFC to the U.S., global orange juice inventories remain below levels typically associated with comfortable availability, meaning increased production or higher stocks do not necessarily translate into looser market conditions.

Florida orange juice availability is projected to increase modestly. Combined Florida processed OJ ending inventories are projected to increase to 273.5 million SSE gallons in 2025-26, equivalent to roughly 32.5 weeks of supply. Total U.S. disappearance, used as a proxy for consumption, is projected to decline 15.2% to 576.7 million SSE gallons as higher retail prices, reduced promotional activity, and continued inflation exert pressure on demand. Retail OJ prices are expected to increase again across all modeled scenarios, with baseline retail volumes declining an estimated 9.2% for NFC-dominant channels.

Florida grapefruit production in 2025-26 is estimated at 1.20 million boxes, a decrease of 7.7% from last season's crop of 1.30 million boxes. Certified fresh grapefruit shipments are estimated to be 828,000 boxes in 2025-26, which would represent a decline of about 5% compared to certified fresh utilization last season. Processed utilization is projected to account for approximately 29% of the total crop and is estimated at 348,000 boxes, a decline of about 7.8% compared to the 2024-25 season. Florida fresh grapefruit is still expected to reach international markets, specifically in Asia, Europe, and Canada.

Combined GJ production plus processor imports, both domestic and foreign, in 2025-26 is estimated at 6.80 million SSE gallons, down 0.13 million SSE gallons from last season. Combining production with beginning inventories, GJ availability in 2025-26 is estimated at 11.7 million SSE gallons, down by 13.3% and representing a decrease of 1.79 million gallons from last year. GJ movement in 2025-26 is estimated at 7.77 million SSE gallons, down 21.5% from last year. The 2025-26 ending inventory for Florida GJ is estimated at 3.95 million SSE gallons (or 26.4 weeks supply).

Florida certified shipments are estimated to be about 45% of the crop with an estimated 181,000 boxes (equivalent to 363,000 cartons) moving during the 2025-26 season to primarily the

domestic market. Additional shipment considered non-certified increased the share to 68% of the grapefruit crop utilized. The domestic share typically represents close to 97% of annual shipments. Florida packers are projected to export approximately five to six thousand cartons of Florida fresh specialty fruit during the 2025-26 season. At an estimated 75% of exports, Canada would be the leading destination of Florida fresh specialty.

The convergence of Florida's declining production due to weather and HLB, uncertain global supply each season, and persistent inflationary pressures on retail sales have created significant headwinds for Florida growers on the 2025-26 season. The current environment requires a multi-faceted approach to supply-side rehabilitation and fostering demand to maintain market access for future production. From a production standpoint, continued investment in replanting programs, integrated pest and disease management systems, and maintaining the processing and packing infrastructure still in place represent the necessities for long-term viability.

Concurrently, the industry must continue to promote awareness of the positive attributes of Florida citrus products. During the 2025-26 season, consumers will see still higher prices at retail. Given increasing price sensitivity among consumers, strategic awareness programs emphasizing the nutritional and wellness attributes of citrus products have become increasingly critical to maintain demand. Coordinated actions in place across production, processing, packing, and marketing sectors are needed to prevent further erosion of Florida's signature crop.

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TABLES

Table 1. Utilization of world oranges – Selected Countries.

	United States			Brazil[b]			Mexico		
Season	Prod[a]	Util Fresh	Util Proc	Prod[a]	Util Fresh	Util Proc	Prod[a]	Util Fresh	Util Proc
	- million 90-lb equivalent boxes -								
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	61.3	29.4	31.9	378.0	113.4	264.6	119.3	62.9	56.4
2024-25p	53.2	32.6	20.6	301.3	63.5	237.8	60.5	32.1	28.4
2025-26f	53.3	30.9	22.4	330.0	63.6	266.4	79.9	42.3	37.6

p = preliminary.
f = Forecast (based on the USDA production forecast for 2025-26 season released on January 12, 2026).
[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
				million 90-lb boxes			
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	1.69	3.46	12.57	16.26	0.07	0.23	17.96
2024-25p	1.00	3.85	7.16	11.16	0.07	0.15	12.20
2025-26f	1.033	3.799	7.093	---	0.075	<0.000	12.000

p = preliminary.
f = Forecast (based on the USDA production forecast for 2025-26 season released on January 12, 2026).
[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 -								
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	18.0	1.8	16.2	307.2	46.1	261.1	119.3	62.1	56.4
2024-25p	12.2	1.1	11.1	230.9	36.1	194.8	60.5	66.6	28.4
2025-26f	12.0	1.1	10.9	314.6	48.2	266.4	79.9	42.3	37.6

p = preliminary.

f = Forecast (based on the USDA production forecast for 2025-26 season released on January 12, 2026).

[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 varous industry sources.

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

Table 4. Comparative orange juice yields, Florida, Brazil, and Mexico.

	Florida[a]	São Paulo[b]	Mexico[c]
Season		SSE gal/box	
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	4.72496	5.03954	4.44154
2024-25p	4.79398	4.78756	4.62229
2025-26f	4.67398	5.24781	4.41493

p = preliminary.
f = Forecast (based on the USDA production forecast for 2025-26 season released on January 12, 2026).
[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 -		
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	75.7	1,350.1	250.7	1,676.5
2024-25p	52.8	981.7	181.1	1,215.6
2025-26f	50.9	1,342.4	248.7	1,642.1

p = preliminary.
f = Forecast (based on the USDA production forecast for 2025-26 season released on January 12, 2026).
[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	Florida[a]		Brazil[b]		Mexico[c]		Total			
	Beg. Inv.	Prod.	Beg. Inv.	Prod.	Beg. Inv.	Prod.	Beg. Inv.	Prod.	Avail	Avail Change
	- million SSE gallons -									- % -
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%
2023-24	184.10	77.26	119.83	1,350.12	2.79	250.67	306.71	1,678.04	1,984.75	-1.63%
2024-25p	165.65	53.69	165.01	981.72	2.79	181.07	333.45	1,216.48	1,549.93	-21.91%
2025-26f	194.86	50.91	206.87	1,342.43	2.79	248.74	404.51	1,642.07	2,046.58	32.04%

p = preliminary.
f = Forecast (based on the USDA production forecast for 2025-26 season released on January 12, 2026).
[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.

Season	USMCA Concentrate	USMCA NFC	**USMCA Total**	Europe Concentrate	Europe NFC	**Europe Total**	East Asia Total	All Else Total	**Total**
Jul - Jun				- million SSE gallons -					
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
2024-25	170.51	266.25	436.77	390.20	164.83	555.04	76.03	26.12	1,093.96
2025-26est	196.90	302.05	498.95	282.52	125.27	407.79	38.51	17.44	962.68

Source: FDOC-EMRD IMEX Database; Secretary of External Commerce – Brazil Comex Stat

Table 8. U.S. Imports orange juice, by origin and type.

FCOJ	**2020-21**	**2021-22**	**2022-23**	**2023-24**	**2024-25**
			- million SSE gallons -		
Florida Ports	**175,260,427**	**178,446,659**	**158,497,552**	**198,685,306**	**205,476,737**
BRAZIL	57,711,921	32,850,373	69,958,251	79,800,432	137,845,870
MEXICO	91,708,575	118,417,894	64,719,012	99,966,308	53,765,375
COSTA RICA	23,870,353	25,786,273	22,379,546	16,956,870	10,810,046
BELIZE	1,449,858	102,830	2,839	20,060	0
Rest of World	519,719	1,289,289	1,437,905	1,941,637	3,055,446
Rest of US	**90,361,955**	**82,490,093**	**122,942,500**	**78,182,183**	**66,805,627**
BRAZIL	70,419,192	62,677,270	96,554,827	58,167,655	36,318,262
MEXICO	16,244,040	13,839,183	15,895,874	12,157,965	14,662,414
COSTA RICA	720,455	1,282,144	609,486	217,145	1,790,396
BELIZE	200	0	1380	0	0
Rest of World	2,978,067	4,691,496	9,880,933	7,639,419	14,034,555
FCOJ Total	**265,622,382**	**260,936,753**	**281,440,051**	**276,867,490**	**272,282,364**
NFC-OJ	**2020-21**	**2021-22**	**2022-23**	**2023-24**	**2024-25**
Florida Ports	**73,009,914**	**124,805,596**	**241,593,915**	**220,147,007**	**203,174,781**
BRAZIL	56,429,047	108,008,020	224,970,070	207,544,129	191,759,308
MEXICO	16,533,163	16,512,468	16,037,569	12,019,572	9,997,944
Rest of World	47,704	285,108	586,276	583,306	1,417,528
Rest of US	**56,260,828**	**56,020,535**	**45,453,332**	**56,708,488**	**322,185,516**
BRAZIL	41,293,369	38,887,017	39,702,614	41,511,752	42,937,291
MEXICO	14,372,111	15,655,190	4,883,788	14,100,867	14,966,562
Rest of World	595,348	1,478,329	866,930	1,095,869	264,281,663
NFC-OJ Total	**114,303,283**	**163,692,613**	**281,296,529**	**261,658,760**	**246,112,071**

Source: FDOC-EMRD IMEX Database; U.S. Department of Commerce.

Table 9. Total Florida forecasted OJ availability, movement, and carryover for 2025-26 and actual for 2023-24 and 2024-25.

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

p = preliminary.
f = Forecast (based on the USDA production forecast for 2025-26 season released on January 12, 2026).
[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 2025-26, and actual for 2022-23 to 2024-25.

Item	2022-23	2023-24	2024-25p	2025-26f
FCOJ		- million SSE gallons -		
Beginning Inventory	122.19	68.40	71.86	120.88
Pack	5.96	16.25	17.83	17.21
Other Sources	188.78	230.20	249.76	214.62
Imports	179.20	214.12	226.57	191.80
FCTJ	2.64	3.37	4.68	4.02
Evap	2.10	11.10	18.73	20.41
Net loss/gain	4.84	1.61	(0.21)	(1.61)
Total FCOJ Availability	316.93	314.85	339.15	352.71
Total FCOJ Movement	248.53	242.97	218.26	191.32
By Form				
Retail	7.01	6.54	5.20	4.54
Institutional	47.31	43.69	41.21	36.01
Bulk	194.21	192.74	171.86	150.76
By Market				
Domestic	245.80	235.92	217.77	191.25
Export	2.73	7.05	0.49	0.06
Ending Inventory	68.40	71.86	120.88	161.40
		- weeks supply -		
Carryover	14.3	15.4	28.8	44.7

p = preliminary based on Florida Processor FCOJ Data.
f = Forecast (based on the USDA production forecast for 2025-26 season released on January 12, 2026).
[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 2025-26, and actual for 2022-23 to 2024-25.

Item[a]	2022-23	2023-24	2024-25p	2025-26f
SSOJ	---------- million SSE gallons ----------			
Beginning Inventory	90.76	115.70	93.80	73.97
Pack From Fruit	61.51	59.49	34.97	33.70
Other Sources	287.62	218.91	213.55	250.03
Imports[b]	248.62	201.19	198.27	236.54
Recon[c]	47.09	33.78	38.61	39.04
Net loss/gain	(8.10)	(16.07)	(23.34)	(25.55)
Total SSOJ Availability	439.89	394.10	342.31	357.70
Total SSOJ Movement	324.19	300.30	268.34	245.63
By Form				
Packaged	307.59	279.86	258.57	229.18
Bulk	16.60	20.44	9.77	16.46
NFC By Market				
Domestic	323.34	299.78	268.27	245.63
Export	0.85	0.52	0.07	<0.01
Ending Inventory	115.70	93.80	73.97	112.06
Bulk Ending Inventory[d]	110.88	89.77	68.49	107.23
	---------- weeks supply ----------			
Carryover	18.6	16.2	14.3	24.2
Bulk Carryover[d]	17.8	15.5	13.3	23.1

p = preliminary.
f = Forecast (based on the USDA production forecast for 2025-26 season released on January 12, 2026).
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[b]	United States		Ending Inventory	Disappearance	
			Imports[c]	Exports[c,d]		TOTAL	Per Capita
	- millions SSE gallons -						gallons
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	203.6	145.2	553.7	35.9	186.9	679.6	2.0
2024-25p	186.9	94.4	535.0	38.3	213.7	564.3	1.7
2025-26f	213.7	101.3	558.9	29.3	290.0	554.6	1.6

p = preliminary.
f = Forecast (based on the USDA production forecast for 2025-26 season released on January 12, 2026).
[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 ----------					
FCOJ						
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	17.76	230.20	50.23	185.69	7.05	5.00
2024-25p	18.72	249.76	46.41	171.37	0.49	50.22
2025-26f	18.19	214.62	40.56	150.76	0.06	41.42
SSOJ						
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	59.49	218.91	279.86	19.92	0.52	(21.90)
2024-25p	34.97	213.55	258.57	9.71	0.07	(19.82)
2025-26f	33.70	270.44	229.18	16.46	0.00	58.50

p = preliminary.

f = Forecast (based on the USDA production forecast for 2025-26 season released on January 12, 2026).

[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 ----------				
2016-17	265.4	148.7	18.1	0.3	432.4
2017-18	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	135.9	13.3	11.8	357.4
2023-24	197.4	95.7	10.8	8.8	312.6
2024-25p	188.8	81.4	9.7	7.0	287.0
2025-26f					
High Price	162.1	69.6	8.0	6.1	245.8
Mid Price	170.4	73.8	8.2	6.1	260.7
Low Price	179.5	78.5	8.3	6.2	272.5

Price[b]					
	---------- $ per SSE gallon ----------				
2016-17	7.67	5.15	4.93	8.50	6.69
2017-18	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	9.16	8.81
2023-24	10.45	7.95	7.55	9.85	9.57
2024-25p	11.78	9.32	8.46	10.89	10.95
2025-26f					
High Price	12.77	10.36	9.59	11.81	12.04
Mid Price	12.28	9.96	9.22	11.36	11.58
Low Price	11.79	9.56	8.85	10.90	11.12

p = preliminary.
f = Forecast (based on the USDA production forecast for 2025-26 season released on January 12, 2026).
[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	2021-22	2022-23	2023-24	2024-25
Share - Any Promo[a]	---------- % of total sales ----------			
NFC	27.6%	28.9%	29.5%	22.5%
RECON	24.6%	24.5%	22.2%	22.9%
TOTAL	25.4%	26.0%	26.0%	21.8%
Share - No Promo	---------- % of total sales ----------			
NFC	72.4%	71.1%	70.5%	77.5%
RECON	75.4%	75.5%	77.8%	77.1%
TOTAL	74.6%	74.0%	74.0%	78.2%
Any Promo Price	---------- $ per SSE gallon ----------			
NFC	$8.61	$9.36	$9.44	$10.51
RECON	$4.65	$6.50	$7.41	$8.52
TOTAL	$7.26	$8.25	$8.86	$9.88
No Promo Price	---------- $ per SSE gallon ----------			
NFC	$9.81	$10.75	$10.88	$12.15
RECON	$5.52	$6.92	$8.11	$9.56
TOTAL	$8.13	$9.00	$9.82	$11.24

[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 16. Destination markets for Florida certified fresh orange shipments.

Season (Aug-July)	Exports		Domestic				TOTAL[b]	
	Overseas[a]	Canada	South	Northeast	Central	West		
	---------- million 45-pound cartons ----------							90-lb boxes
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	0.01	0.12	1.48	0.93	0.70	0.13	3.37	1.69
2024-25p	0.01	0.02	0.88	0.61	0.46	0.02	2.01	1.00
2025-26f	0.01	0.02	0.91	0.63	0.48	0.02	2.07	1.03

p = preliminary.
f = Forecast (based on the USDA production forecast for 2025-26 season released on January 12, 2026).
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
	---------- million 85-lb boxes ----------					
2006-07	10.311	11.565	4.426	0.648	0.251	27.200
2007-08	9.915	10.458	5.197	0.708	0.322	26.600
2008-09	8.677	8.428	3.702	0.662	0.231	21.700
2009-10	8.710	6.047	4.589	0.647	0.307	20.300
2010-11	7.728	6.967	4.176	0.651	0.228	19.750
2011-12	7.246	6.873	3.830	0.683	0.218	18.850
2012-13	7.136	6.103	4.232	0.607	0.272	18.350
2013-14	6.054	4.733	4.048	0.636	0.179	15.650
2014-15	5.274	3.835	3.158	0.434	0.199	12.900
2015-16	4.536	2.770	3.067	0.410	0.018	10.800
2016-17	3.246	1.814	2.363	0.291	0.047	7.760
2017-18	1.620	0.556	1.556	0.124	0.025	3.880
2018-19	1.786	0.602	1.976	0.135	0.011	4.510
2019-20	2.044	0.471	2.242	0.093	0.000	4.850
2020-21	1.889	0.309	1.791	0.098	0.013	4.100
2021-22	1.759	0.200	1.327	0.067	(0.022)	3.330
2022-23	1.037	-	0.683	0.030	0.060	1.810
2023-24	1.171	-	0.585	0.030	0.004	1.790
2024-25p	0.872	0.002	0.375	0.017	0.034	1.300
2025-26f	0.828	0.002	0.346	0.017	0.007	1.200

p = preliminary.
f = Forecast (based on the USDA production forecast for 2025-26 season released on January 12, 2026).

Table 18. Florida FCGJ and SSGF availability, movement, and carryover for 2025-26, and actual for 2022-23 through 2024-25.

Item	2022-23	2023-24	2024-25p	2025-26f
FCGJ		--- million SSE gallons ---		
Beginning Inventory	4.21	3.37	2.30	1.62
Pack From Fruit	<0.00	--	--	--
Imports and other adjustments[a]	1.08	0.72	0.45	0.85
Total FCGJ Availability	5.28	4.10	2.75	2.56
Movement	1.91	1.88	1.14	0.92
Ending Inventory	3.37	2.30	1.62	1.16
Carryover (weeks supply)	91.9	63.4	74.0	67.1
SSGJ[c]		--- Million SSE gallons ---		
Beginning Inventory	8.45	6.20	4.28	3.30
Pack from Fruit[a]	3.28	3.03	2.10	1.60
Imports/Dom Receipts[b]	5.77	6.63	5.68	5.59
Total SSGJ Availability	17.50	15.86	12.06	10.50
Movement – NFC	11.14	9.99	8.76	6.85
Movement– RECON/EVAP[d,e]	0.32	0.18	0.15	0.15
Total SSGJ Movement	11.30	10.02	8.76	6.85
Bulk Ending Inventory	6.05	5.66	3.15	3.49
		--- Weeks supply ---		
Bulk Carryover[f]	28.5	22.3	19.6	27.6
TOTAL GJ				
Beginning Inventory	12.66	9.58	6.57	4.92
Production and Imports[a]	9.85	9.57	6.94	6.80
Total GJ Availability	22.50	19.15	13.51	11.72
Movement- Domestic	13.02	11.85	9.84	7.77
Movement- Export	0.03	0.03	0.06	0.01
Total GJ Movement	13.05	11.88	9.90	7.77
Bulk Ending Inventory	9.74	7.98	4.77	3.95
		--- Weeks supply ---		
Carryover	38.8	35.0	25.0	26.9

p = preliminary. f = Forecast (based on the USDA production forecast for 2025-26 season released on January 12, 2026).
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
	Million SSE gallons						
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[f]	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	10.5	15.7	7.6	4.4	8.9	20.4	0.06
2024-25p	8.9	12.1	6.8	5.1	6.1	16.6	0.05
2025-26f	6.1	12.4	6.7	4.5	6.1	14.5	0.04

p = preliminary.
f = Forecast (based on the USDA production forecast for 2025-26 season released on January 12, 2026).
[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 inlcuded 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 estiamtes, 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] 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 ----------				
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	8.47	0.18	2.97	0.42	12.04
2021-22	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[b]	6.83	0.18	2.78	0.02	9.81
2024-25p	6.36	0.22	2.71	0.01	9.30
2025-26f					
High Price	5.59	0.20	0.01	2.26	8.05
Mid Price	5.83	0.20	0.01	2.37	8.41
Low Price	6.09	0.21	0.01	2.50	8.80
Price					
	---------- $ per SSE gallon ----------				
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[b]	11.20	24.29	9.00	$7.55	10.82
2024-25p	12.61	23.43	9.27	$8.46	11.89
2025-26f					
High Price	14.08	26.10	8.90	9.73	13.05
Mid Price	13.54	25.10	8.55	9.35	12.55
Low Price	12.99	24.10	8.21	8.98	12.05

p = preliminary.
f = Forecast (based on the USDA production forecast for 2025-26 season released on January 12, 2026).
[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 databse, 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	2021-22	2022-23	2023-24	2024-25
Share - Any promo[a]	---------- % of total sales ----------			
NFC	29.1%	31.6%	30.5%	30.5%
RECON	5.2%	9.1%	12.7%	11.2%
TOTAL	23.3%	25.4%	25.1%	24.3%
Share - No Promo	---------- % of total sales ----------			
NFC	70.9%	68.4%	69.5%	69.5%
RECON	94.8%	90.9%	87.3%	88.8%
TOTAL	76.7%	74.6%	74.9%	75.7%
Any Promo Price	---------- $ per SSE gallon ----------			
NFC	$8.49	$8.92	$9.54	$10.55
RECON	$10.95	$10.21	$10.25	$10.56
TOTAL	$8.64	$9.06	$9.72	$10.65
No Promo Price	---------- $ per SSE gallon ----------			
NFC	$10.64	$11.38	$11.93	$13.52
RECON	$8.59	$8.93	$8.82	$9.10
TOTAL	$10.06	$10.74	$11.19	$12.29

[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
2006-07	6.751	1.282	4.395	8.195	13.872	20.623	10.311
2007-08	6.183	1.163	5.015	7.468	13.647	19.829	9.915
2008-09	6.045	1.088	3.924	6.297	11.308	17.353	8.677
2009-10	6.109	1.151	3.455	6.705	11.312	17.421	8.710
2010-11	5.396	1.098	3.121	5.839	10.060	15.455	7.728
2011-12	5.529	0.992	2.799	5.168	8.962	14.491	7.246
2012-13	5.987	1.087	2.917	4.278	8.284	14.271	7.136
2013-14	5.126	0.987	2.609	3.380	6.982	12.108	6.054
2014-15	4.422	0.805	2.328	2.993	6.126	10.549	5.274
2015-16	3.791	0.655	1.926	2.699	5.280	9.071	4.536
2016-17	2.660	0.423	1.420	1.986	3.831	6.491	3.246
2017-18	1.512	0.221	0.610	0.897	1.729	3.241	1.620
2018-19	1.867	0.300	0.517	0.883	1.705	3.572	1.786
2019-20	2.226	0.315	0.707	0.830	1.861	4.087	2.044
2020-21	2.448	0.219	0.524	0.574	1.330	3.777	1.889
2021-22	2.603	0.163	0.416	0.321	0.916	3.519	1.759
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	2.342	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

p = preliminary.
f = Forecast (based on the USDA production forecast for 2025-26 season released on January 12, 2026).
[a] Total exports figue includes certain offshore exports shipped to destimations 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
	---------- million 90-pound boxes ----------			
2006-07	3.129	0.371	2.350	5.850
2007-08	3.400	0.314	3.286	7.000
2008-09	2.992	0.349	1.659	5.000
2009-10	3.049	0.377	1.924	5.350
2010-11	3.051	0.399	2.350	5.800
2011-12	2.885	0.387	2.168	5.440
2012-13	2.380	0.305	1.595	4.280
2013-14	2.012	0.327	1.441	3.780
2014-15	1.734	0.184	1.562	3.480
2015-16	1.13	-	0.70	1.820
2016-17[b]	0.86	-	0.77	1.620
2017-18	0.43	0.05	0.26	0.750
2018-19	0.49	0.05	0.45	0.990
2019-20	0.57	0.07	0.38	1.020
2020-21	0.548	0.051	0.291	0.890
2021-22	0.438	0.046	0.266	0.750
2022-23	0.324	0.011	0.145	0.480
2023-24	0.305	0.024	0.121	0.450
2024-25p	0.182	0.061	0.157	0.400
2025-26f	0.182	0.061	0.157	0.400

p = preliminary.
f = Forecast (based on the USDA production forecast for 2025-26 season released on January 12, 2026).
[a] Processed boxes are utilized for orange juice, except some tangerines utilized to 100% produce tangerine juice.
+ 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 ----------							--- million 90-pound boxes---
2006-07	0.008	0.410	2.55	2.14	1.29	0.20	6.61	3.30
2007-08	0.001	0.334	2.82	2.47	1.20	0.16	7.07	3.53
2008-09	0.052	0.326	2.40	2.22	1.16	0.14	6.25	3.12
2009-10	0.099	0.298	2.45	1.97	0.95	0.60	6.35	3.17
2010-11	0.039	0.238	2.47	1.96	0.99	0.55	6.36	3.18
2011-12	0.052	0.214	2.42	1.82	0.89	0.55	5.95	2.98
2012-13	0.030	0.159	2.04	1.48	0.72	0.42	4.93	2.46
2013-14	0.031	0.127	1.70	1.33	0.62	0.37	4.20	2.10
2014-15	0.013	0.058	1.53	1.19	0.48	0.26	3.61	1.80
2015-16	0.016	0.042	0.99	0.81	0.32	0.17	2.37	1.19
2016-17	0.005	0.015	0.72	0.61	0.20	0.13	1.72	0.86
2017-18	0.008	0.027	0.41	0.30	0.09	0.05	0.87	0.43
2018-19	0.007	0.030	0.48	0.31	0.09	0.06	0.98	0.49
2019-20	0.015	0.020	0.58	0.31	0.11	0.11	1.14	0.57
2020-21	0.005	0.012	0.63	0.23	0.08	0.12	1.10	0.55
2021-22	0.002	0.004	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
2023-24	0.0028	0.009	0.37	0.14	0.06	0.04	0.61	0.31
2024-25p	0.0021	0.00	0.21	0.08	0.03	0.04	0.36	0.18
2025-26f	0.0015	0.004	0.22	0.08	0.03	0.03	0.36	0.18

p = preliminary.
f = Forecast (based on the USDA production forecast for 2025-26 season released on January 12, 2026).
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.


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