Global Marketing
January
FCC Update



2026 Consumer Trends: Florida Citrus

2025 Dietary Guidelines for Americans Update

Domestic Florida Orange Juice Marketing Program Update

FY2025/26 Domestic Fresh Citrus Programs Update

International Marketing Programs Update



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2026 Consumer Trends: Florida Citrus

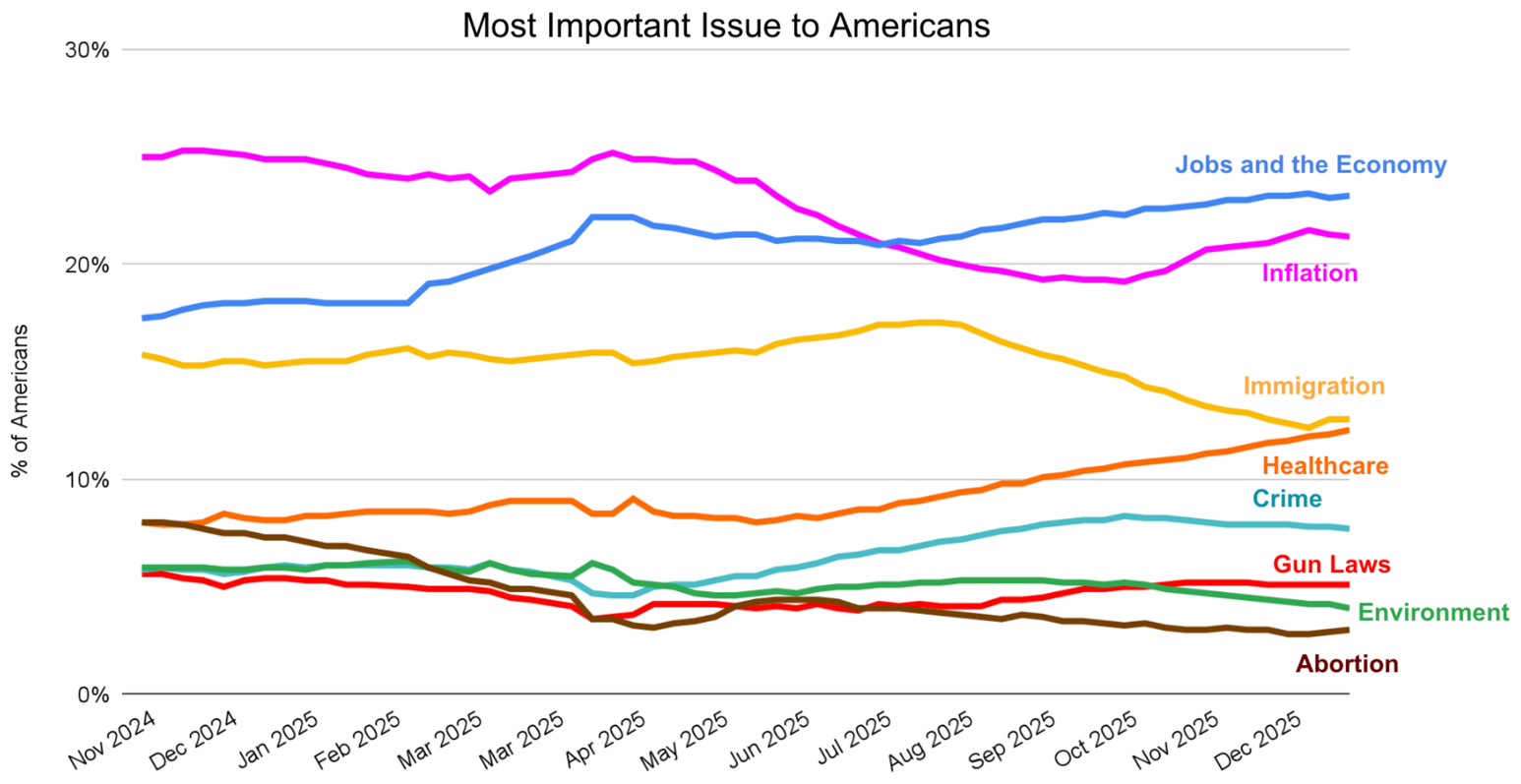


Consumer Mindset Shaped by Economic Concerns

As the new year begins, and voter attention shifts toward the 2026 midterm elections, jobs and the economy, and inflation continue to be voters' top concerns.

In a tight and cooling labor market, longer-term economic stability and job security have consumers' top concern.

With inflationary pressures in mind it's not surprising to see that healthcare has risen steadily coinciding with debate over ACA tax credits and rising concerns over healthcare affordability and access.



Source: Occam AlphaROC

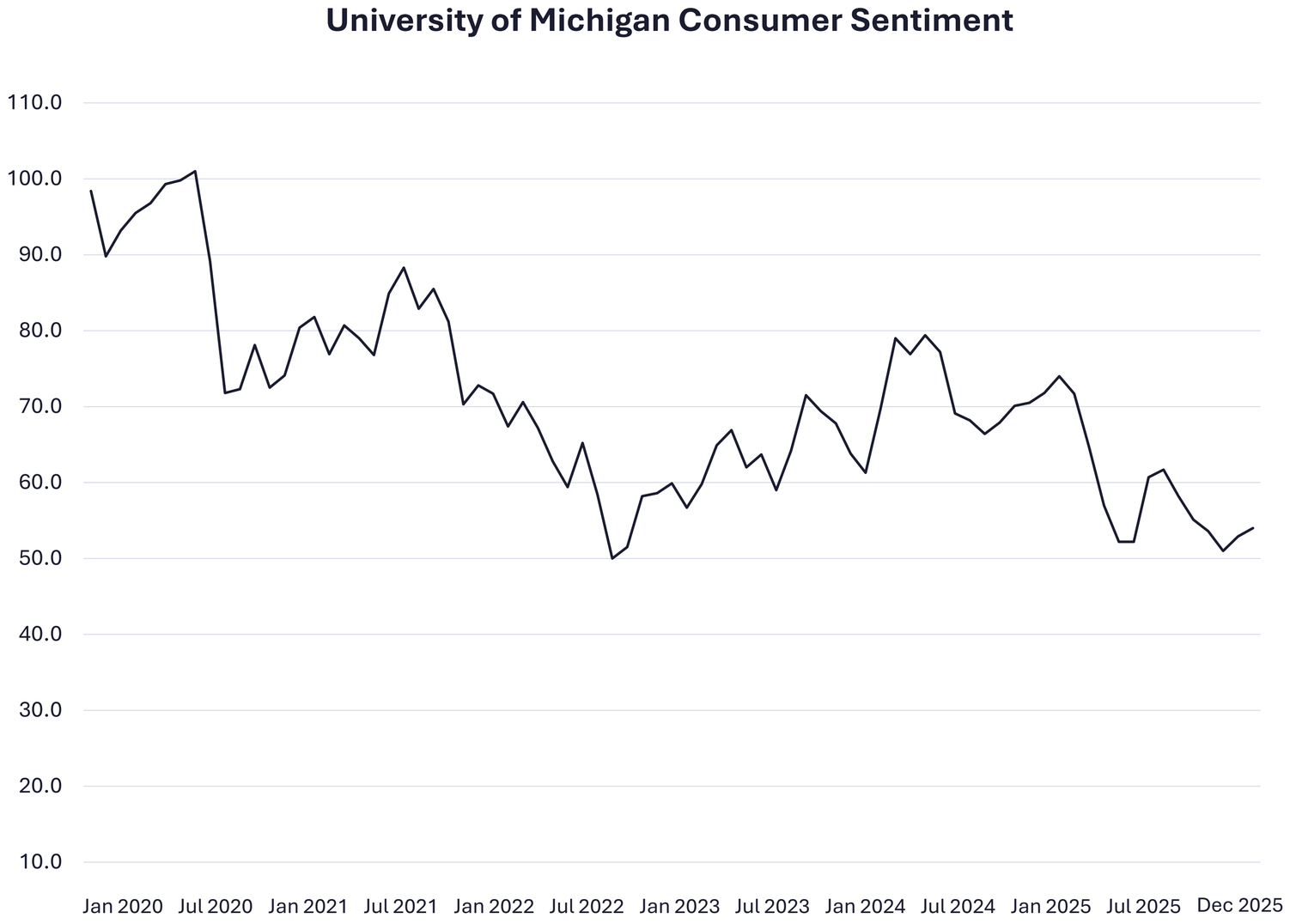
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Consumers Sentiment Stuck at Historic Lows

U.S. consumer sentiment increased slightly in December 2025, but remains near record lows due to worries about rising inflation and pessimism about the job environment.

% Changes in CPI for 2025

	DEC	12 Months
All Items	0.3	2.7
Food at Home	**0.7**	**2.4**
NA Beverages	**0.4**	**5.1**
Foodservice	0.7	4.1



Sources: University of Michigan, US Bureau of Labor Statistics

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Juice Category & Orange Juice Pricing Trending Ahead of Average Food Inflation

- Refrigerated orange juice price increases are running at over 5x the rate of overall grocery price increases
- Orange juice volumes continue to decline across all food channels
- Sharp increases in pricing have helped refrigerated and NFC orange juices grow dollars in the 25/26 season
- Prices in the overall juice category are among the fastest growing with pace of increases accelerating through end of 2025

Price Trends in Retail Food & Beverage



Price per Volume (4 weeks ending Nov. 30, 2025 % change vs. YA

2025 YTD and 25/26 SYTD Sales Trend Scorecard

Dollar, Unit Sales and Price – All Food Channels – Change vs. Year Ago

		% Change	$ / Unit	$ / U %Change
All Food & Bev	**Dollars**	3.4%	$4.29	2.6%
	Units	0.6%		
Refrigerated Orange Juice	**Dollars**	3.7%	$11.52	15.9%
	Units	-10.5%		
NFC Orange Juice	**Dollars**	7.4%	$12.44	17.7%
	Units	-8.4%		
Recon Orange Juice	**Dollars**	-8.0%	$9.51	8.8%
	Units	-15.5%		

F&B Data Source: Circana, YTD ending Dec 28, 2025
Orange Juice Data Source: FDOC NIQ Retail Sales Trend SYTD ending 12/27/25
For Orange Juice, unit = gallon

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Value-seeking Shopping Behavior Intensified in 2025

Deal Shopping Behavior Continued to Grow in 2025

Consumers are shopping more frequently, purchasing less per trip, especially in center-store foods.

Uncommitted Shopping Behavior is Becoming Further Entrenched in All Retail Categories

Digital, value-seeking, opportunistic shoppers who prioritize their households and wallets over loyalty to any retailer or brand are becoming the norm.

Grocery Shopping Trips

Average Annual Retail Trips/HH	Change vs. 2023	Change vs. 2021
222	+12 trips (+6%)	+22 trips (+11%)

Per Trip Purchase	2025	Change vs. YA
Items	5.2	-0.1
Categories	3.8	-1.6

Average U.S. Consumer Monthly Transactions

2.6 +7% YoY
Gas Stations per Month

3.2 +17% YoY
Convenience Stores per Month

3.2 +8% YoY
Grocery Stores per Month

4.0 +3% YoY
Restaurants per Month

60% of consumers compare prices between locations all or most of the time

Sources: Circana, Upside

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Little Treat Culture Reflects a Shift in Consumers' Approach to Indulgences

- This trend reflects a shift in discretionary spending in uncertain times, with small, affordable indulgences becoming key emotional and experiential purchases
- LTC reflects a pivot to self-care, and emotional reward through everyday low-cost purchases rather than infrequent luxury buys
- People have redefined "indulgence" in today's world where bigger milestones (like homeownership or expensive travel) often feel less attainable





86% of consumers enjoy a snack, drink, or dessert simply to brighten their day in the past month

66% of consumers say they have a little treat weekly, and that rises to **77% among Gen Z specifically**

Source: Datassentials Hot Shot Report

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Citrus Flavors Evident in Beverage Menu & Concept Trends

Beverages are cornerstone of “little treat culture” that are driving higher frequency lower cost foodservice visits — shakes, refreshers, smoothies and mocktails.

Smoothie juice and bowl concepts are growing, fueled by consumer interest in indulgent healthy choices.

Beverage innovation and limited time offers are key to foodservice customer engagement and loyalty programs.

Citrus Beverage Menu Terms

	Menu Penetration	12-month Growth	4-year Growth
Smoothies			
Lime	7.7%	+51%	+45%
Juice	7.1%	+66%	+35%
Milkshakes			
Creamsicle	1.7%	+68%	+21%
Lime	2.9%	+43%	+69%
Mocktails			
Blood Orange	3.0%	+32%	+211%
Grapefruit	6.0%	0%	+353%

Number of Locations Added ‘25 vs. ‘19

Smoothie Juices	tropical SMOOTHIE CAFE 769	SMOOTHIE KING 228	nékter JUICE BAR 89
Smoothie Bowls	PLAYA BOWLS 259	NAUTICAL BOWLS 75	everbowl 67

Source: Datassentials, Circana

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Wellness Continues to be a Fundamental Mainstream Driver of Food & Beverage Choices

Physical exercise and food & beverage choices are tied as the two top contributors to health and wellbeing – picked by 51% of Americans – up in 2025 vs. 2024.

77% of Americans would like to eat a healthier diet.

Gen Z

(1997-2012, Age 13-28)

Exploring identity and independence, Gen Z is navigating early adulthood with a focus on mental health, authenticity, and financial firsts.

Health is Identity

- Wellness intersects with social and environmental beliefs
- Health reflects deeper values like sustainability and ethics
- Digital-first habits shape health decisions
- Health is self-empowering and socially-validated

Millennials

(1981-1996, Age 29-44)

Millennials are juggling careers, parenting, and rising costs, seeking balance through flexible work, wellness routines, and financial stability.

Health is Balance

- Wellness is functional, driving 'feel good' energy and productivity
- Rely on sustainable, integrated daily wellness routines
- Convenience, flexibility, and value drive health choices
- Health part of broader pursuit of work-life balance

Gen X

(1965-1980, Age 45-60)

In their peak earning and caregiving years, Gen X is managing households, aging parents, and long-term planning while prioritizing resilience and practicality.

Health is Resilience

- Energy and stress maintenance are essential
- Health supports role as caregiver and provider
- Wellness choices are practical and time-efficient
- Aging well and preventive care are important, but need to be convenient

Boomers

(1946-1964, Age 61-79)

Mostly retired or nearing retirement, Boomers are focused on maintaining health, independence, and enjoying the fruits of decades of hard work.

Health is Independence

- Health is about maintaining autonomy and quality of life
- Managing health conditions and preventive care are top priorities
- Simplicity and reliably matter more than trends
- Good health enables meaningful moments and legacy-building

Beverages Play a Disproportionate Role in Addressing Personalized Well-being Need States

Fusion of Needs/Occasions

Indulgence + hydration + recovery + social

Blending of Beverages

Fruit taste + protein + caffeine + low calorie

Physical and Mental Benefits

Physical energy, weight loss and mood elevation, mental focus/clarity

Source: Circana

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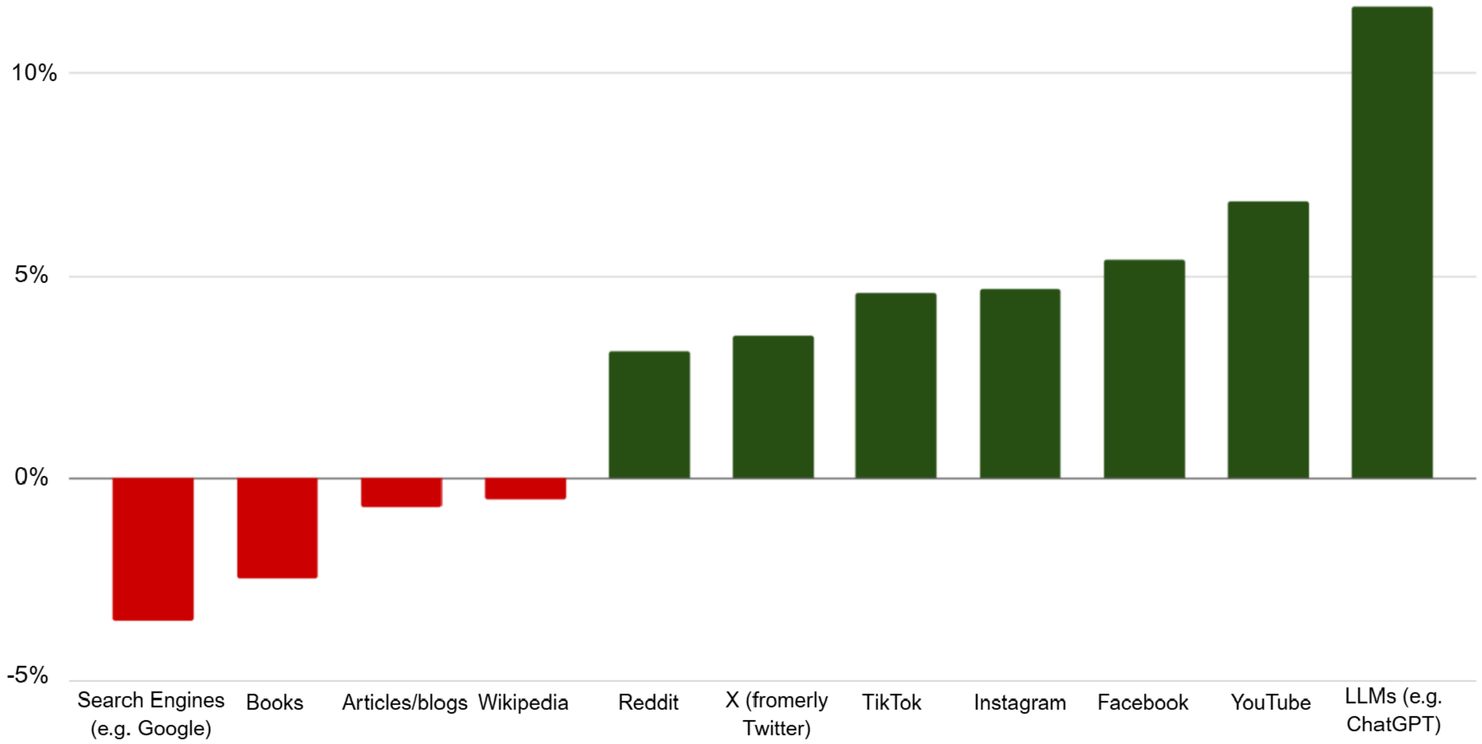


AI Growing Source of Personalized Guidance

Artificial intelligence will continue shaping consumer experiences. Expect:

- AI-powered recommendations and shopping assistants
- Tailored products and services based on behavior data
- Expect more AI in retail customer service and digital engagement

2025 vs 2024 Change in Americans' Go-to Sources for Information



Note: Data reflects responses from U.S. adults in August 2025. Respondents citing friends or family were excluded.

Source: AlphaROC

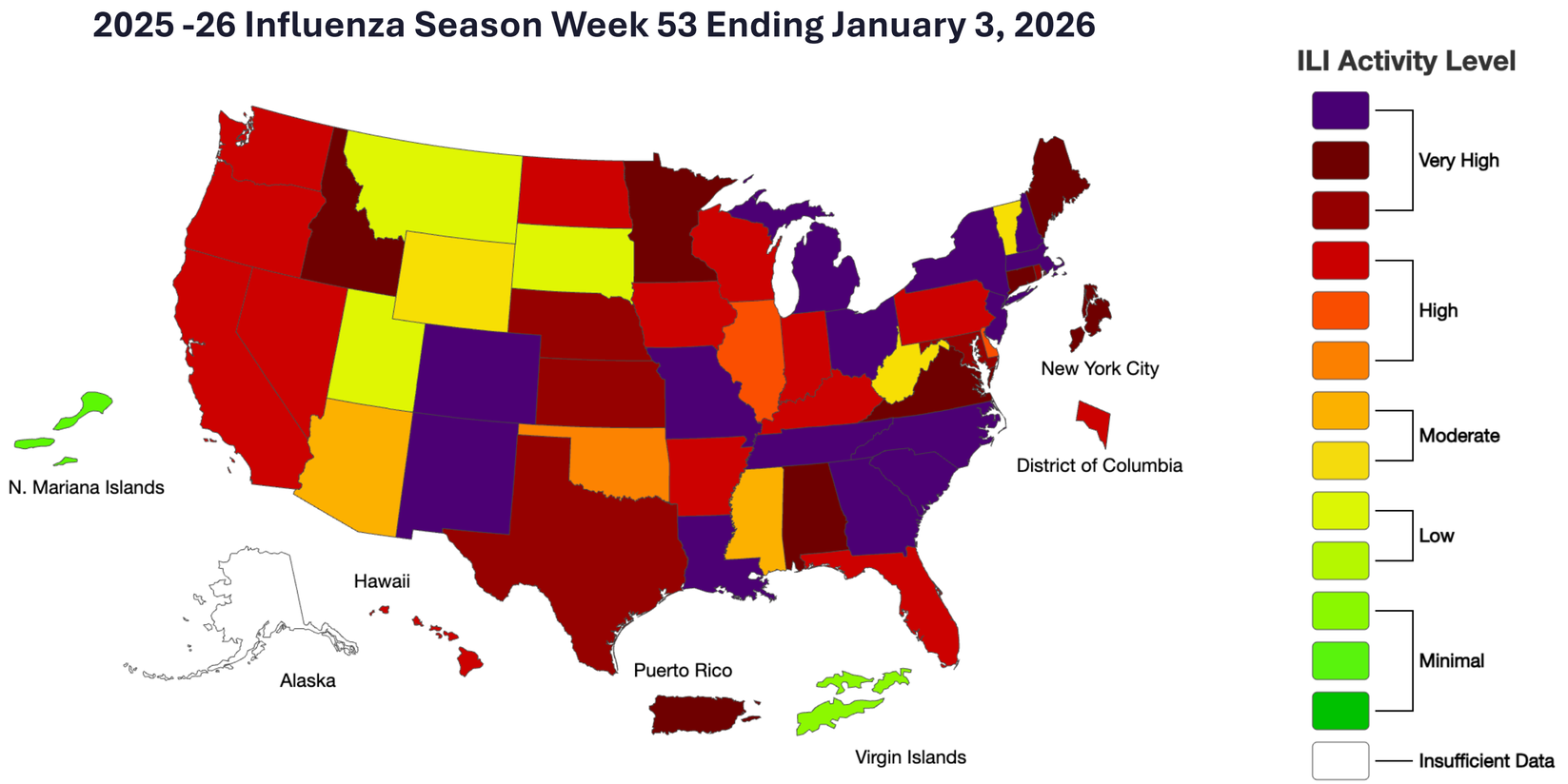
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Prime Opportunity for the Original Wellness Drink in Flu & Cold Season

Majority of states reporting high or very high levels of flu symptoms.

Vaccinations down 6% though end of 2025, reliance on home remedies up.

Higher health care costs driving prevention mindset.



Source: CDC

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Key Takeaways

- Consumer challenged by economic uncertainty and inflationary prices especially in grocery and foodservice — value shopping behavior is the new norm, eroding retailer and manufacturer brand loyalty
- Orange juice volumes challenged in grocery retail by price increases running 5X those of the overall food channel — higher quality/better value NFC orange juice performing better vs. reconstituted orange juice
- Consumer sentiment is weak — people crave affordable everyday treats and indulgences, especially those aligned with wellness and better for you benefits
- Beverages — smoothies, mocktails, shakes, refreshers are a big player in the Little Treat Culture movement — citrus is evident within beverage treat options, and should be leveraged
- Wellness continues to be a primary driver in food and beverage behavior — new AI-driven digital tools are playing an increased role in consumer search for personalized solutions — FDOC content must be optimized for this new reality
- Prevalence and severity of 25/26 U.S. flu season offers a point of maximal relevance for orange juice and citrus fruits

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2025 Dietary Guidelines for Americans Update



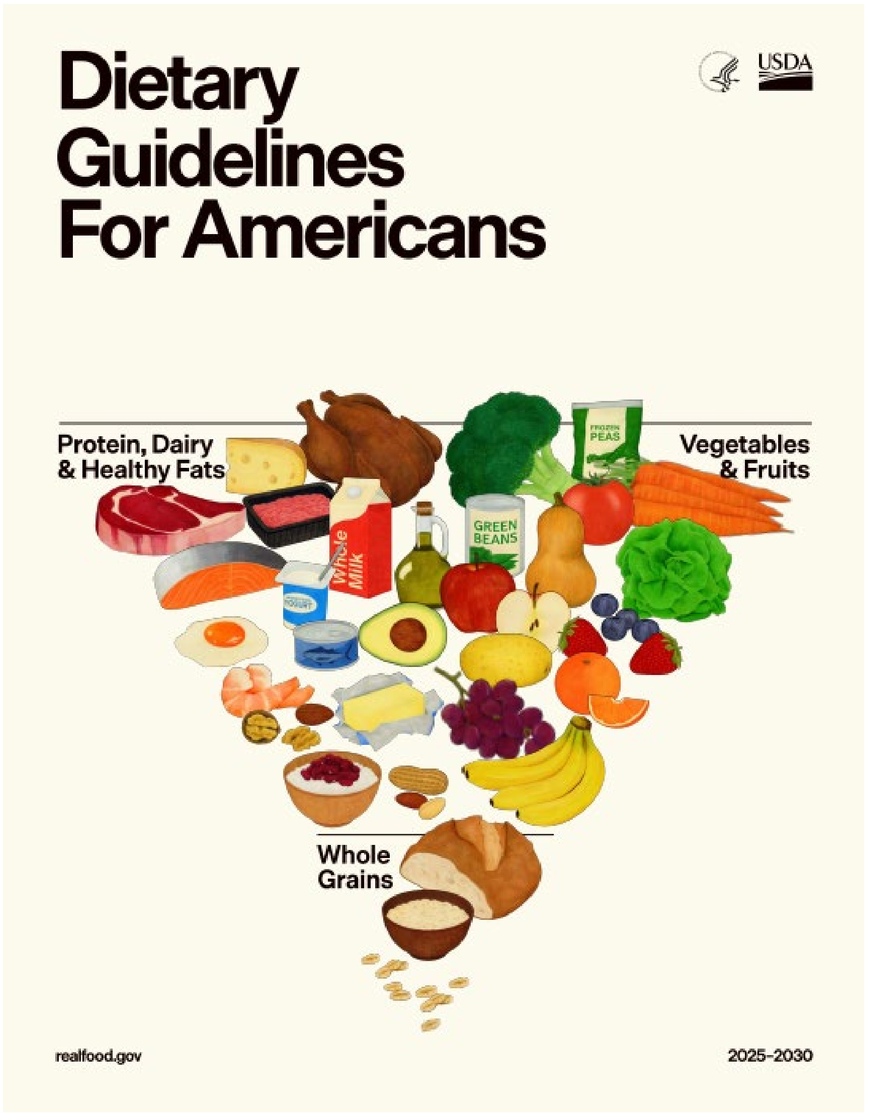
The 2025-2030 Dietary Guidelines for Americans Were Released on January 7

WHAT THEY SAY

- **Eat the right amount for you**
- Prioritize protein foods at every meal
- Consume dairy
- **Eat vegetables and fruits throughout the day**
- Incorporate healthy fats
- Focus on whole grains
- **Limit highly processed foods, added sugars** and refined grains
- Limit alcoholic beverages

WHY THEY MATTER

The DGAs are the foundation for federal feeding programs and national nutrition guidance.

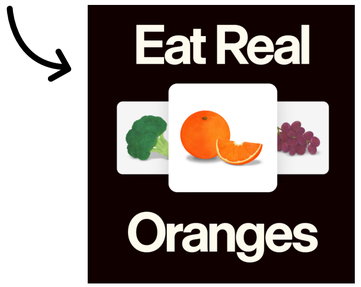


New Guidance Elevates Whole Citrus, Recommends 100% Juice With Limits

FRESH CITRUS

- Strong alignment with “Eat Real Food” framework
- More than meets the standards "whole, minimally processed, nutrient-dense"
- Included in the New Pyramid

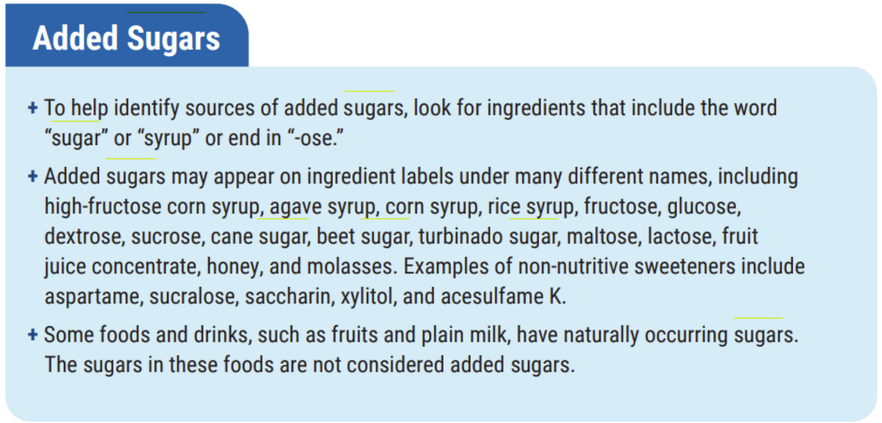






100% JUICE

- Recognized as part of the fruit group, with no added sugar
- Recommended in limited portions or diluted with water
- Differentiated from whole fruit due to fiber and satiety
- For children, cites evidence linking higher juice intake with weight gain



Conversations Dominated by Meat & Processed Foods; Sparking Mixed Reactions from Nutrition Thought Leaders

AP

New dietary guidelines urge Americans to avoid processed foods and added sugar

The Guardian

Trump administration releases updated dietary guidelines: 'Eat real food'

New guidance presented by Robert F Kennedy Jr prioritizes protein, healthy fats and 'declares war on added sugar'

msn

Fruit juice is banished but you should eat red meat and butter, Americans told in food revolution

*"We are concerned that recommendations regarding salt seasoning and red meat consumption **could inadvertently lead consumers to exceed recommended limits for sodium and saturated fats**, which are primary drivers of cardiovascular disease."*

American Heart Association.

"While many recommendations align with longstanding nutrition science, other elements raise significant concerns."

eat right PRO® Academy of Nutrition and Dietetics

*" [..] oversimplification of the Guidelines in ways that introduce contradictory messaging is likely to **further confuse consumers**."*

ASN EST. 1928 American Society for Nutrition
Excellence in Nutrition Research and Practice

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Turning DGA Nuance Into Clear, Credible Messaging

Real Fruit Nutrition

100% orange juice is made entirely from fruit, with no added sugar, as is fresh citrus

Distinct from Sugary Beverages

Unlike sugar-sweetened beverages, 100% orange juice offers key nutrients like vitamin C, potassium and folate

Complements Whole Fruit

Orange juice can be a part of healthy eating alongside whole fruit

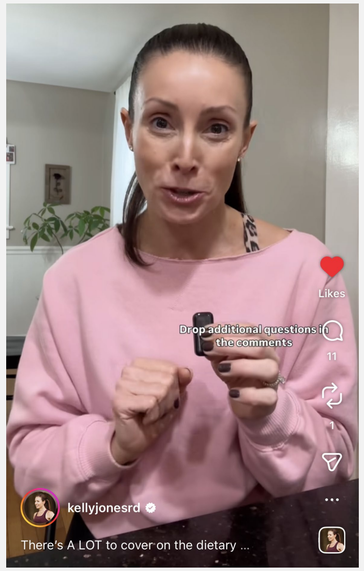
An Easy Way to Get More Fruit

100% juice can help Americans achieve daily fruit and nutrient goals

Supports Health Across the Lifespan

Fortified 100% orange juice provides key nutrients, like calcium and vitamin D, that support health across different ages

Expert Reinforcement: FLOJ Squad



*[Juice] is also **packed with nutrition**. 90%+ Americans don't meet produce needs and **8 oz juice (4oz for kids) is an easy add to protein and fiber rich meals**.*

Trust me that it's not the 100% juice causing high levels of obesity and chronic disease.

Health Professional Education & Campaign Integration



Domestic Florida Orange Juice Program Update



FY 2025-2026 Florida Citrus: January 16, 2026

FDOC DOMESTIC OJ MARKETING CAMPAIGN

OVERVIEW

BUDGET: $8.6M

Advertising Attributed Sales Goal
$25-30 Million

% To Goal ($25M)
97.38%

Advertising Attributed Sales
$24,343,972

FY2024-25 Annual FDOC Generic Promotion Return on Investment (ROI)*
$1.69 - $2.23

*Benefits of FDOC Generic Promotion on Demand for OJ, Annual ROI Study, UF-FAMRC

ATTRIBUTED SALES



ATTRIBUTED SALES BY PARTNER

Walmart	Instacart	Performance Marketing
$8,899,771	$4,361,675	$11,082,526

AUDITED POST ESTIMATE

(Week-ending March 29, 2025)

Early/Mid-Season
$4.51636 (Final)

Valencia
$4.21898 (Final)

Grapefruit
White: $3.50000 (Final)
Red/Pink: $3.75000 (Final)

Average Price Per Pounds Solids

CROP FORECAST

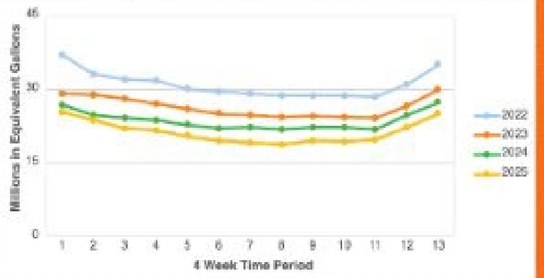
(January 2026)

Florida Oranges
12.0 Million Boxes

Florida Grapefruit
1.2 Million Boxes

Florida Specialty
400,000 Boxes

U.S. TOTAL OJ VOLUME SALES



TOTAL U.S. – XAOC SYTD 2025-26 IN GALLONS

(SYTD – December 27, 2025)

REGION	GALLONS	PRICE PER EQ
South TL OJ	28,068,754	$11.17
Midwest TL OJ	13,962,565	$11.41
West TL OJ	12,440,210	$12.29
Northeast TL OJ	12,287,931	$11.66
TOTAL U.S. TL OJ	66,730,495	$11.52

FDOC CITRUS JUICE STATISTICS

Florida Processors' Statistics Report Summary (Oct-Sep)
Season-to-Date Packaged and Bulk Movement
W/E December 27, 2025, Processors' Statistics Report #13

	2024-25	2025-26	% CHANGE
SSOJ (NFC) (Millions SSG)	77.3	67.4	-12.8%
FCOJ (Millions SSG)	56.3	49.6	-11.9%
SSGJ (NFC) (Millions SSG)	2.4	1.9	-21.6%
FCGJ (Millions SSG)	0.3	0.5	61.2%

*Data Source: 2019-2023 FDOC Custom Database – Nielsen Answers on Demand (AOD) and Nielsen IQ Discover

Paid Media Continues to Outperform Sales Expectations

Juice buyers are engaged and we are driving above average ROAS across platforms. Instacart has delivered a 22% YoY lift in attributed sales and a 16% increase in units, despite a 14% reduction in spend.

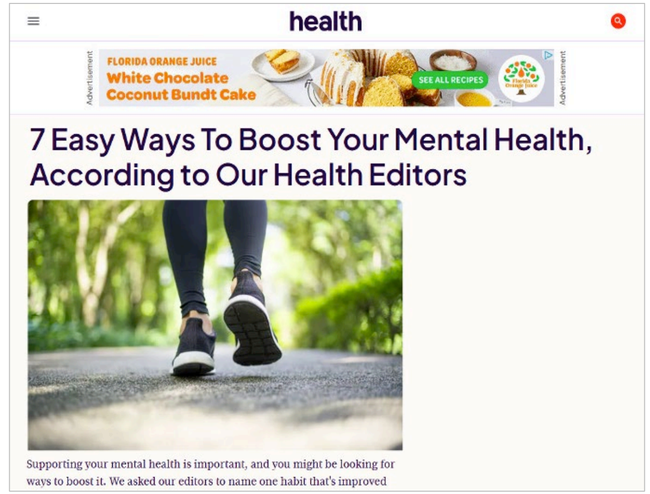
Walmart performance is also strong. The Winter Wellness campaign is already delivering a ROAS above $22, already surpassing last year's final campaign result of $21.86.

2.14M E-Comm Units Sold	**169.3M** Impressions	**$24.3M** Attributed Sales
$17.30 Average ROAS	**91%** VCR	**212.8K** Clicks to website











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Holiday Airport Advertising Drives Video Views

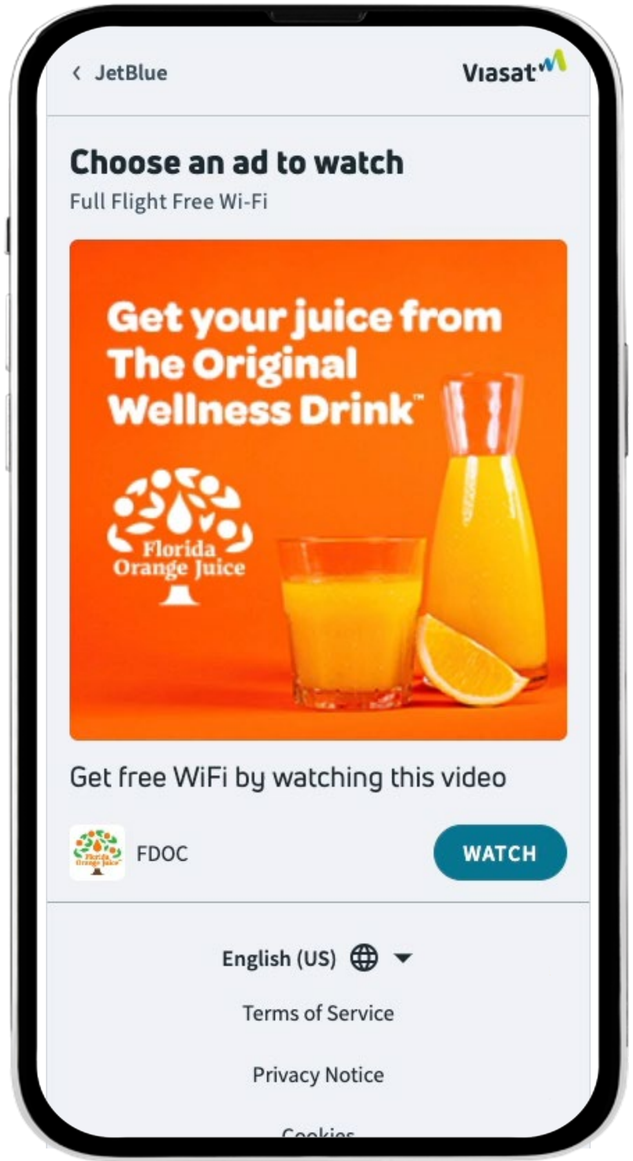
Florida Orange Juice was featured in immunity-focused Wi-Fi ads on inbound flights to Florida on JetBlue and American Airlines during the peak holiday travel season.

Performance exceeded benchmarks, with watch action rates up to 67.6% versus a 31.8% standard.

67.6%
Watch Action Rate

53,055
Video Views/Sessions

78,535
Impressions



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New Seasonal Recipes Lead to Major Q4 Improvements Over 2024

New seasonal, holiday-centric recipes boosted engagement and efficiency, increasing CTR by 30% on Pinterest and 272% on Meta, while reducing CPC by 39% and 69% YoY.

49,923,625 Organic Impressions	**1,528,342** Organic Engagements
66,709,354 Paid Impressions	**2,143,072** Paid Engagements









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Automated Nutrition Facts Enable New Promotional Tactics While Building Website Value & Trust

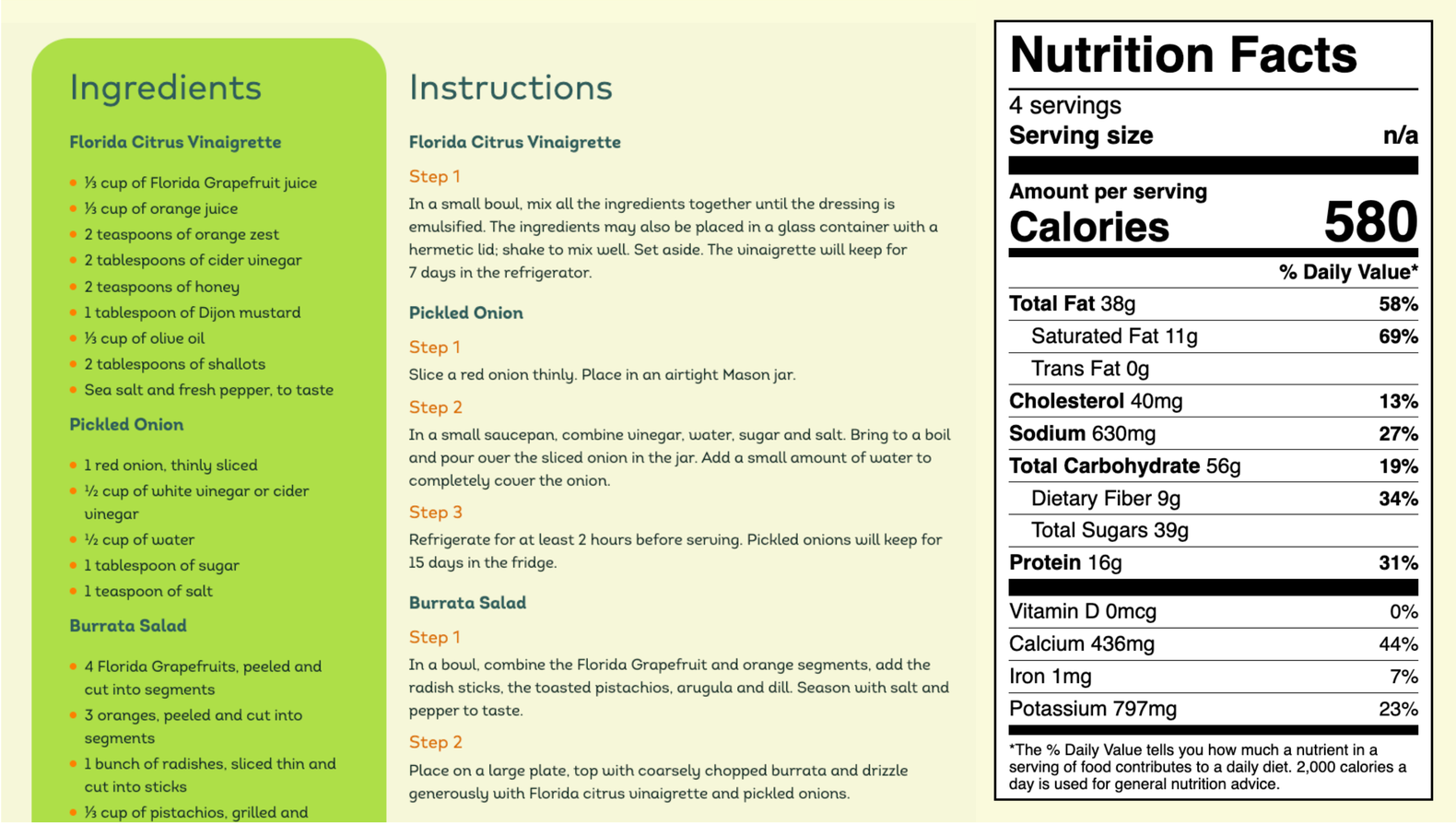
FDOC's recipes are the centerpiece of the website, inspiring product use and powering cross-channel promotion that drives clicks, saves, and prints — helping deliver 82% of page-view goals to date.

494.5K
Total Users
214% Increase YoY

721.8K
Page Views
236% Increase YoY

30.5K
Recipe Prints/Saves
New in 2025

+60.2%
YoY Increase in
Time Spent



Ingredients

Florida Citrus Vinaigrette

- ⅓ cup of Florida Grapefruit juice
- ⅓ cup of orange juice
- 2 teaspoons of orange zest
- 2 tablespoons of cider vinegar
- 2 teaspoons of honey
- 1 tablespoon of Dijon mustard
- ⅓ cup of olive oil
- 2 tablespoons of shallots
- Sea salt and fresh pepper, to taste

Pickled Onion

- 1 red onion, thinly sliced
- ½ cup of white vinegar or cider vinegar
- ½ cup of water
- 1 tablespoon of sugar
- 1 teaspoon of salt

Burrata Salad

- 4 Florida Grapefruits, peeled and cut into segments
- 3 oranges, peeled and cut into segments
- 1 bunch of radishes, sliced thin and cut into sticks
- ⅓ cup of pistachios, grilled and

Instructions

Florida Citrus Vinaigrette

Step 1

In a small bowl, mix all the ingredients together until the dressing is emulsified. The ingredients may also be placed in a glass container with a hermetic lid; shake to mix well. Set aside. The vinaigrette will keep for 7 days in the refrigerator.

Pickled Onion

Step 1

Slice a red onion thinly. Place in an airtight Mason jar.

Step 2

In a small saucepan, combine vinegar, water, sugar and salt. Bring to a boil and pour over the sliced onion in the jar. Add a small amount of water to completely cover the onion.

Step 3

Refrigerate for at least 2 hours before serving. Pickled onions will keep for 15 days in the fridge.

Burrata Salad

Step 1

In a bowl, combine the Florida Grapefruit and orange segments, add the radish sticks, the toasted pistachios, arugula and dill. Season with salt and pepper to taste.

Step 2

Place on a large plate, top with coarsely chopped burrata and drizzle generously with Florida citrus vinaigrette and pickled onions.

Nutrition Facts

4 servings
Serving size n/a

Amount per serving
Calories 580

	% Daily Value*
Total Fat 38g	**58%**
Saturated Fat 11g	**69%**
Trans Fat 0g	
Cholesterol 40mg	**13%**
Sodium 630mg	**27%**
Total Carbohydrate 56g	**19%**
Dietary Fiber 9g	**34%**
Total Sugars 39g	
Protein 16g	**31%**
Vitamin D 0mcg	0%
Calcium 436mg	44%
Iron 1mg	7%
Potassium 797mg	23%

*The % Daily Value tells you how much a nutrient in a serving of food contributes to a daily diet. 2,000 calories a day is used for general nutrition advice.

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Expertise Yields Coverage Worth The Squeeze

Building strong relationships with registered dietitians and a tailored outreach strategy drove a 76% increase in media impressions and more than 1,000 additional placements compared to the same period in 2024.

2.3B
Impressions YTD

186M
Impressions
December 2025

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martha stewart

6 of the Best Fruits to Boost Your Immunity This Winter, According to Nutritionists

Help keep sickness at bay with these tasty immune-supporting fruits.

By Kirsten Nunez | Published on January 7, 2026

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Credit: Gettv Imaoes

health

7 Drinks Athletes Need for Hydration and Recovery After Workouts

By Jillian Kubala, RD • Published on October 16, 2025

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Credit: Jordi Salas / Getty Images

After a tough workout, what you drink matters just as much as what you eat.

While water is one of the most popular choices for hydration, there are **other drinks that can help replenish lost water and electrolytes**, restore energy reserves, and support post-workout muscle recovery.

Here are 7 expert-recommended hydration and recovery drinks to help you refuel and feel your best after exercise.

AP

Florida Orange Juice Makes a Splash on Holiday Menus This Year



1 of 5 | Chef Jordan Andino cooking at the Florida Orange Juice "Walking in a Citrus Wonderland" event.

martha stewart

How to Freeze Oranges: The Best Methods for Whole Fruit, Segments, Juice, and Zest

A citrus expert explains the best ways to preserve every part of this favorite fruit.

By Lynn Andriani | Updated on December 17, 2025

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In This Article

- Freezing Whole Oranges
- Freezing Orange Segments, Slices, and Supremes
- Freezing Orange Juice
- Freezing Orange Zest
- The Best Types to Freeze
- Using Thawed Oranges



Credit: Getty Images

KEY TAKEAWAYS

- You can freeze every part of an orange—whole fruit, segments, juice, or zest—because citrus freezes beautifully without losing

Fresh Oranges Update



Leveraging the Power of Florida Oranges with Retailers

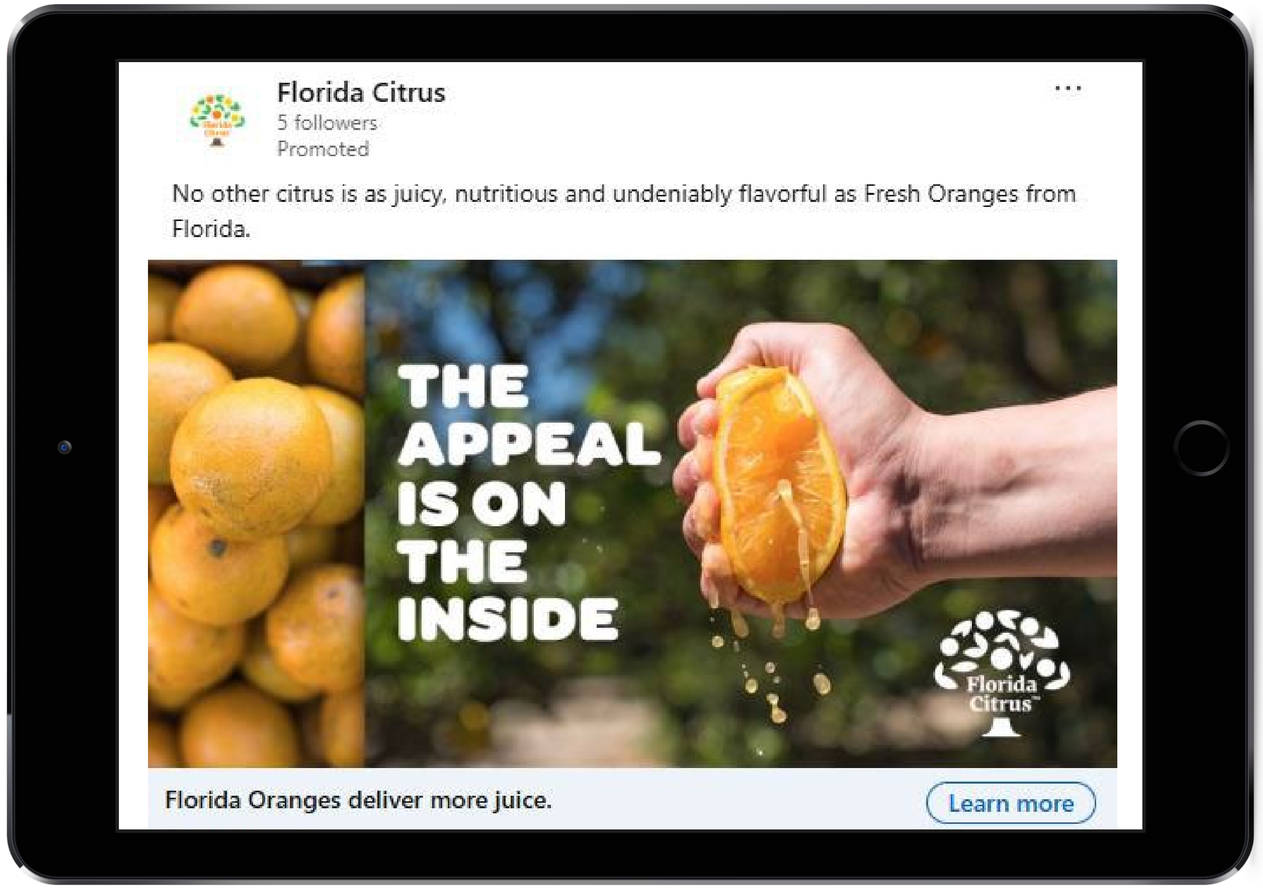
Social ads on LinkedIn and Meta are laying the foundation for upcoming retail promotions resulting in:

1.4M
Paid Social Impressions

1.6K
Paid Social Engagements

An upcoming media partnership with Grocery Dive is set to launch by early March following the completion of the omnibus survey with a suite of tactics:

- Custom Article
- Custom Infographic
- E-Newsletter Promotions



GROCERY DIVE

producebusiness

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Fresh Citrus Workshop in January

An opportunity to attend in-person sessions to guide planning for FY 26/27 Fresh Citrus programs.

This Fresh Citrus Workshop will take place in Bartow, FL on January 29th where industry members can take part in planning sessions provide real-time feedback.



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Grapefruit Update



Positioning Florida Grapefruit as a Versatile Health Hero

Tailored media placements are driving buzz around the health benefits of Florida Grapefruit and Grapefruit Juice.

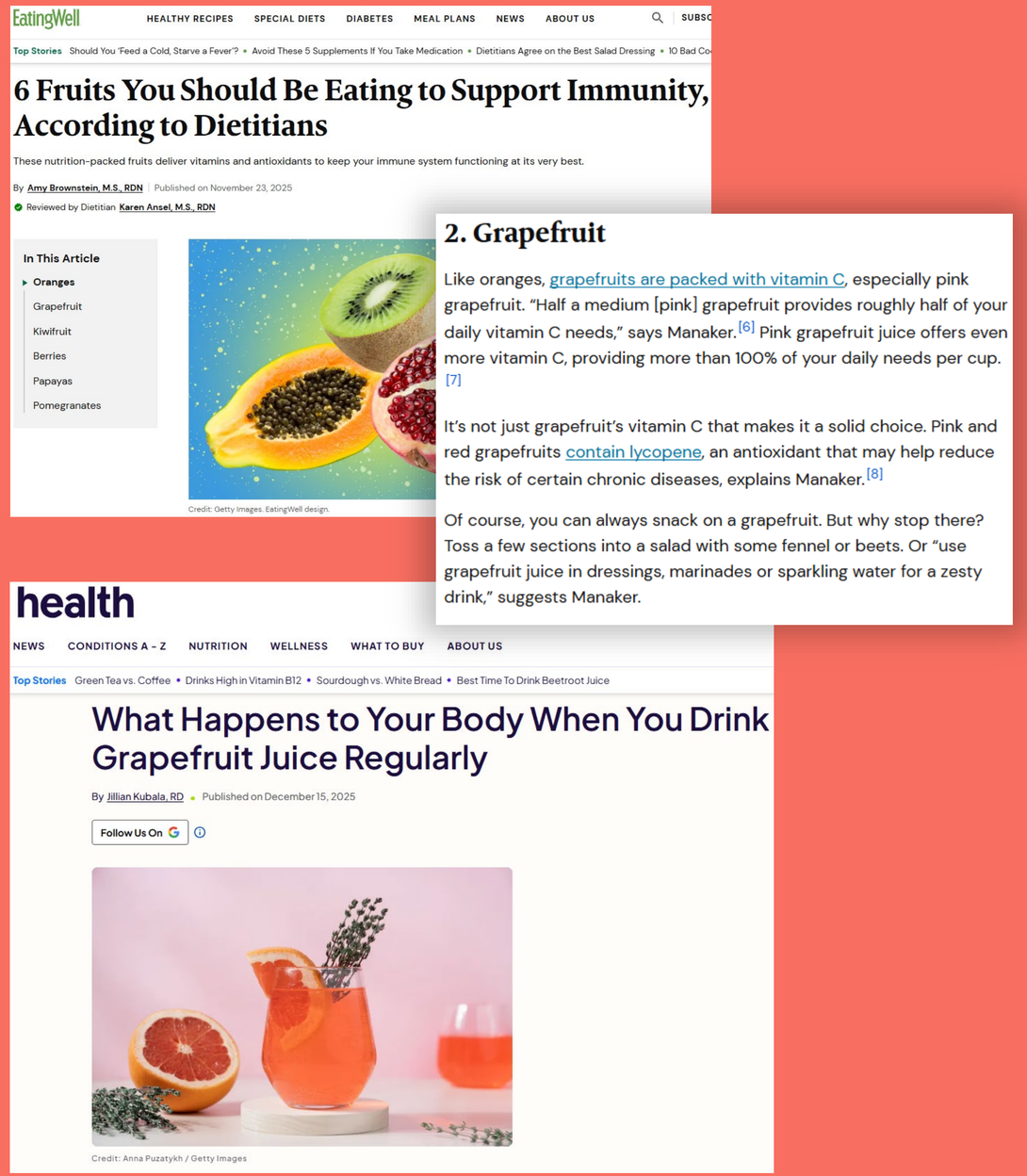
Partnering with registered dietitians is driving high value media placements in Health and Eating Well, while social promotions continue to inspire usage opportunities and reinforce health benefits.

19M
Media Impressions YTD

5.5M
Impressions
December 2025

58K
Organic Social Impressions

909
Organic Social Engagements



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Gift
Fruit
Update
Florida Citrus

Inspiring Gift Fruit Sales for the Holidays

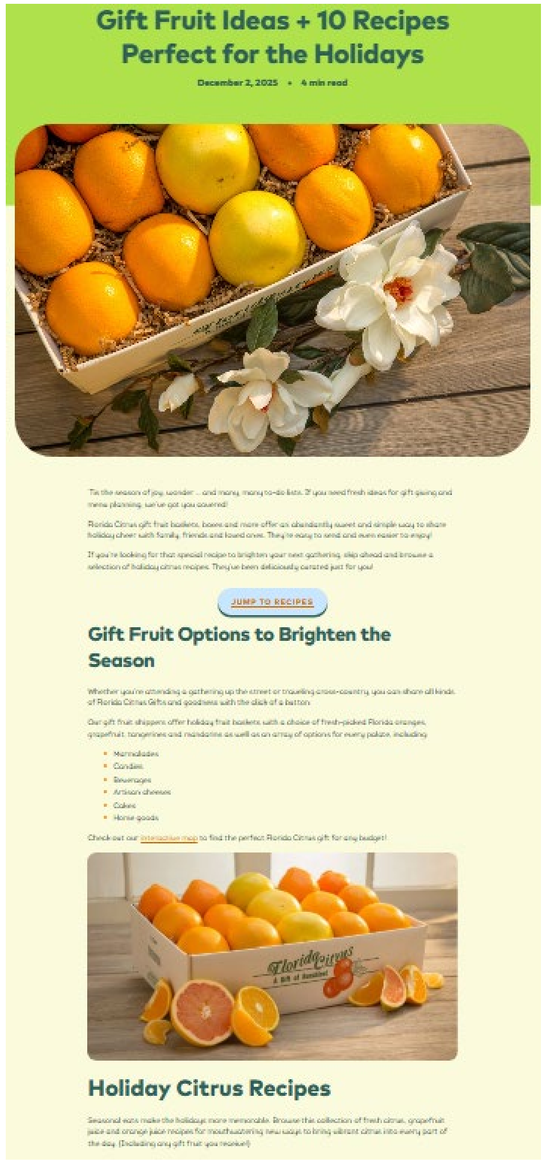
The holiday search campaign and tailored social and media partner content placed Florida Citrus Gifts at top of mind and search results, increasing page views YoY by 168% and overall program impressions by 38%.

338M+
YTD Impressions

59.7K
YTD Engagements

15.2K
Website: Page Views
168% Increase from 2024

10.2K
Website: Active Users
140% Increase from 2024











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International Program Update



International Agency Education Tour













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Thank You

