

Global Marketing March FCC Update

March FCC Agenda

Domestic Florida Orange Juice Marketing Program Update

- Latest Dashboard Results
- Digital Advertising Performance
- New Lifestyle Content
- Benchmark Arena & Tampa Bay Lighting Highlights

FY2025/26 Domestic Fresh Citrus Programs Update

- Fresh Citrus
- Grapefruit
- Fresh Citrus Workshop Recap
- New Fresh Citrus Program Recommendations



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Domestic Florida Orange Juice Program Update



FY 2025-2026 Florida Citrus: March 13, 2026

FDOC DOMESTIC OJ MARKETING CAMPAIGN

OVERVIEW

BUDGET: $8.6M

Advertising Attributed Sales Goal
$25-30 Million

% To Goal ($25M)
144.62%

Advertising Attributed Sales
$36,153,951

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
$11,063,761	$5,895,603	$19,194,587

AUDITED POST ESTIMATE
(Week-ending January 24, 2026)

Early/Mid-Season
N/A

Valencia
N/A

Grapefruit
White: N/A
Red/Pink: N/A

Average Price Per Pounds Solids

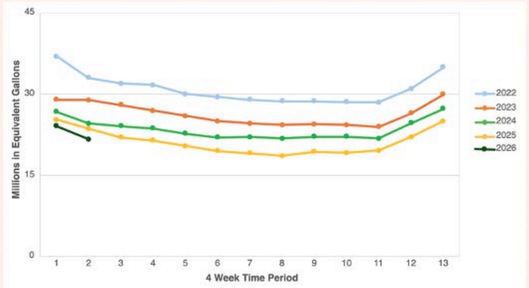
CROP FORECAST
(January 2026)

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 – February 21, 2026)

REGION	GALLONS	PRICE PER EQ
South TL OJ	47,726,226	$11.22
Midwest TL OJ	23,656,148	$11.48
West TL OJ	20,833,160	$11.77
Northeast TL OJ	20,757,851	$12.38
TOTAL U.S. TL OJ	112,923,805	$11.59

FDOC CITRUS JUICE STATISTICS

Florida Processors' Statistics Report Summary (Oct-Sep)
Season-to-Date Packaged and Bulk Movement
W/E February 28, 2026, Processors' Statistics Report #22

	2024-25	2025-26	% CHANGE
SSOJ (NFC) (Millions SSG)	128.1	117.9	-8.0%
FCOJ (Millions SSG)	98.0	83.1	-15.3%
SSGJ (NFC) (Millions SSG)	4.0	3.5	-12.6%
FCGJ (Millions SSG)	0.5	0.8	84.1%

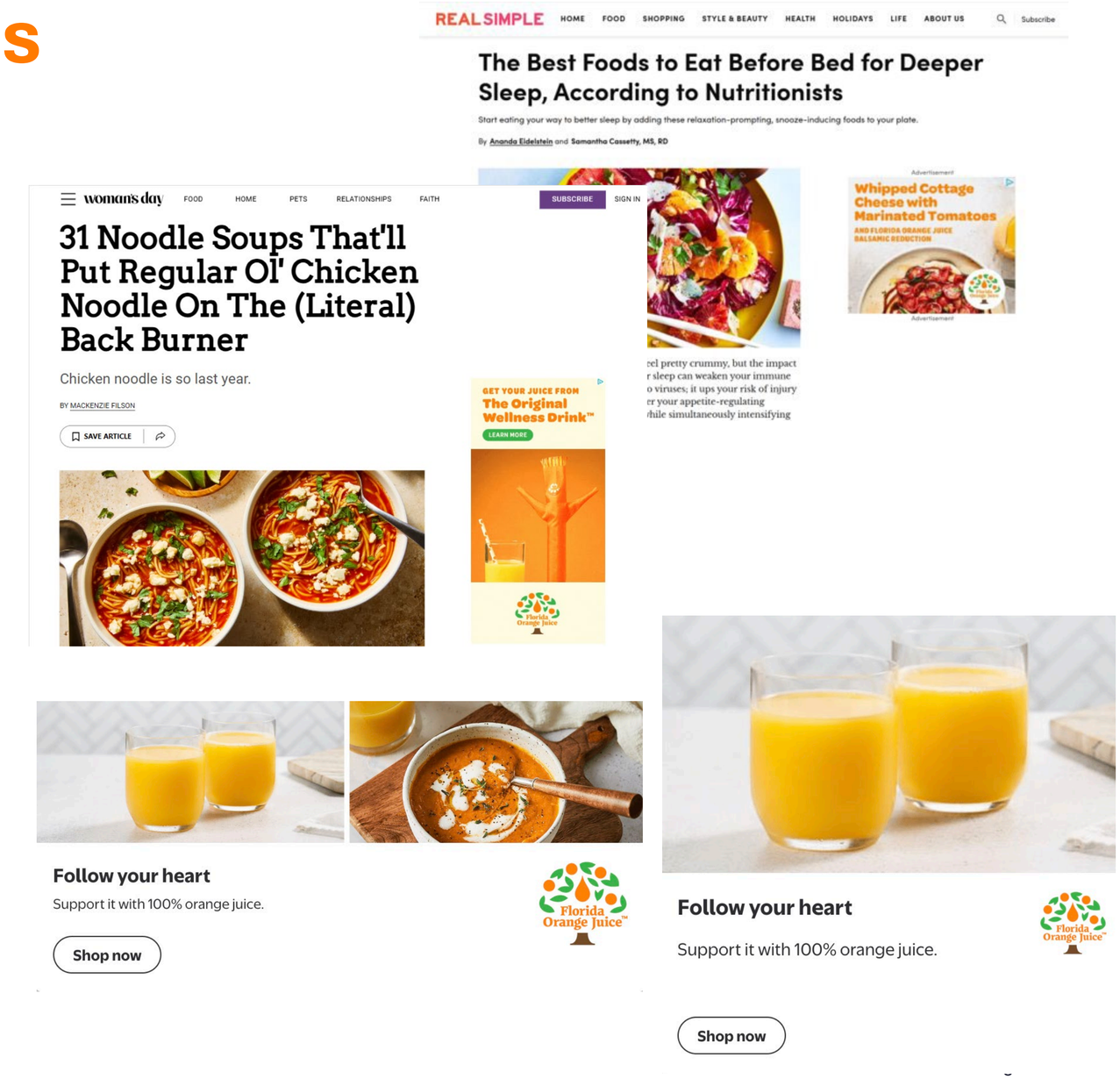
*Data Source: 2022-2026 FDOC Custom Database – Nielsen Answers on Demand (AOD) and Nielsen IQ Discover

Digital Advertising Exceeds Attributed Sales Goals

Juice buyers remain engaged, and performance improved across both efficiency and revenue generation. Instacart attributed sales increased 15%, driving ROAS growth from $11.80 to $15.50, year-over-year. Attributed units also grew by 6.5%, demonstrating substantially stronger overall results.

The Walmart Winter Wellness campaign ended with a ROAS of $36.21 surpassing last year's final campaign result of $21.86 and the combined average ROAS grew to $19.32.

2.73M E-Comm Units Sold	**217.6M** Impressions	**$36.15M** Attributed Sales
$19.32 Average ROAS	**92%** VCR	**254.8K** Clicks to website



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Walmart Campaign Update

Issue

- The Walmart campaign ran into a product availability issue and inventory changes, with many approved UPCs becoming unavailable, particularly certain product sizes.
- This led to a data delay in reporting dashboards since February 20, initially believed to be temporary.

Action

- Early attributed sales estimates provided by Walmart were overstated by approximately +$200K; corrections were applied all impacted dashboards retroactively.
- The Heart Health campaign paused on March 10 until inventory and reporting accuracy are resolved.

Next Steps

- Updated UPCs received on March 13th are being reviewed against approved 100% OJ UPCs to reactivate campaign.
- Brands will need to approve new UPC usage.
- Despite the pause, this program has **already exceeded the $35M stretch sales goal**, and **Instacart plus performance marketing continue delivering strong ROAS**, allowing sales to continue growing while the issue is addressed.

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New OJ Assets to Amplify the True Originals



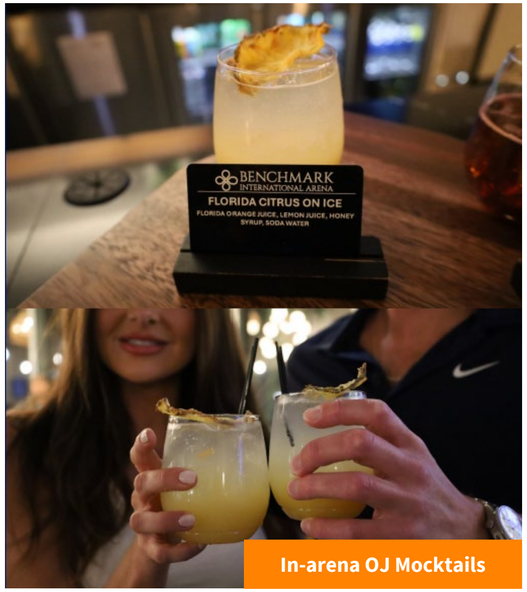




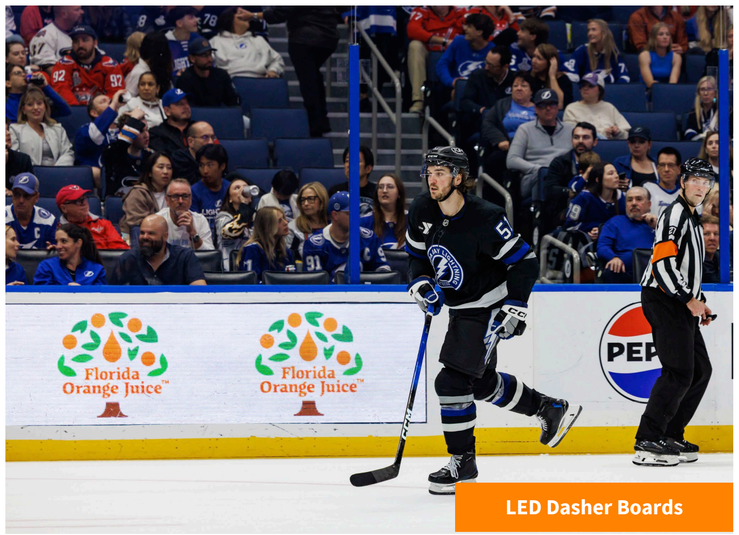
Florida Orange Juice on Ice



Broadcast Digital Dasher Boards



In-arena OJ Mocktails



LED Dasher Boards


In-arena LED Ribbon





“Morning Skate” Social Media Sponsorship


Visitor Tunnel LED



Pre-game Plaza Sampling & Giveaways

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Fresh Citrus Update

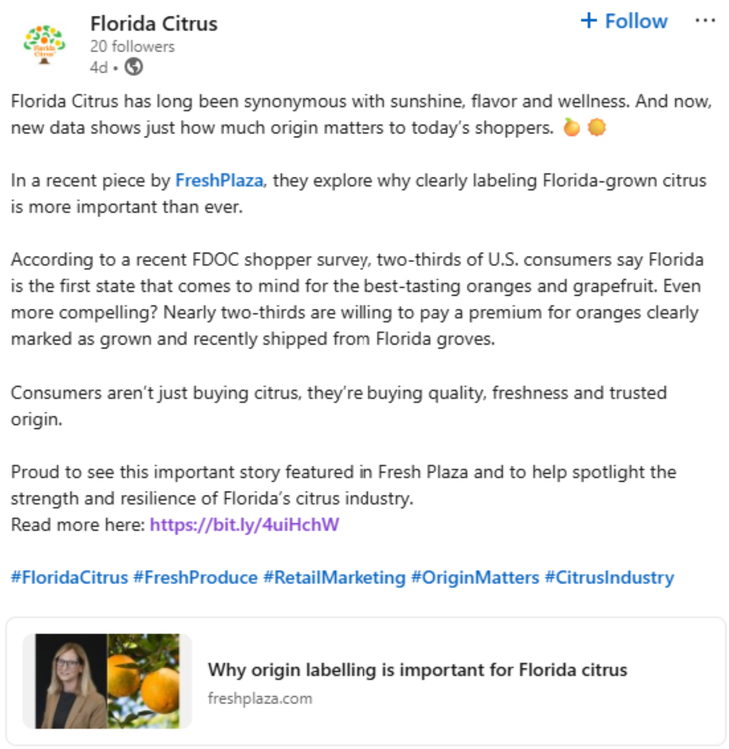


Equipping Retail Decision Makers with Fresh Citrus Shopper Insights

Paid and organic social showcase shopper preference and earned media for Florida Citrus, while media partnerships reinforce the value of origin labeling and consumer demand for Florida Oranges and Grapefruit at retail.

3.34M
Paid Social Impressions

4K
Paid Social Engagements







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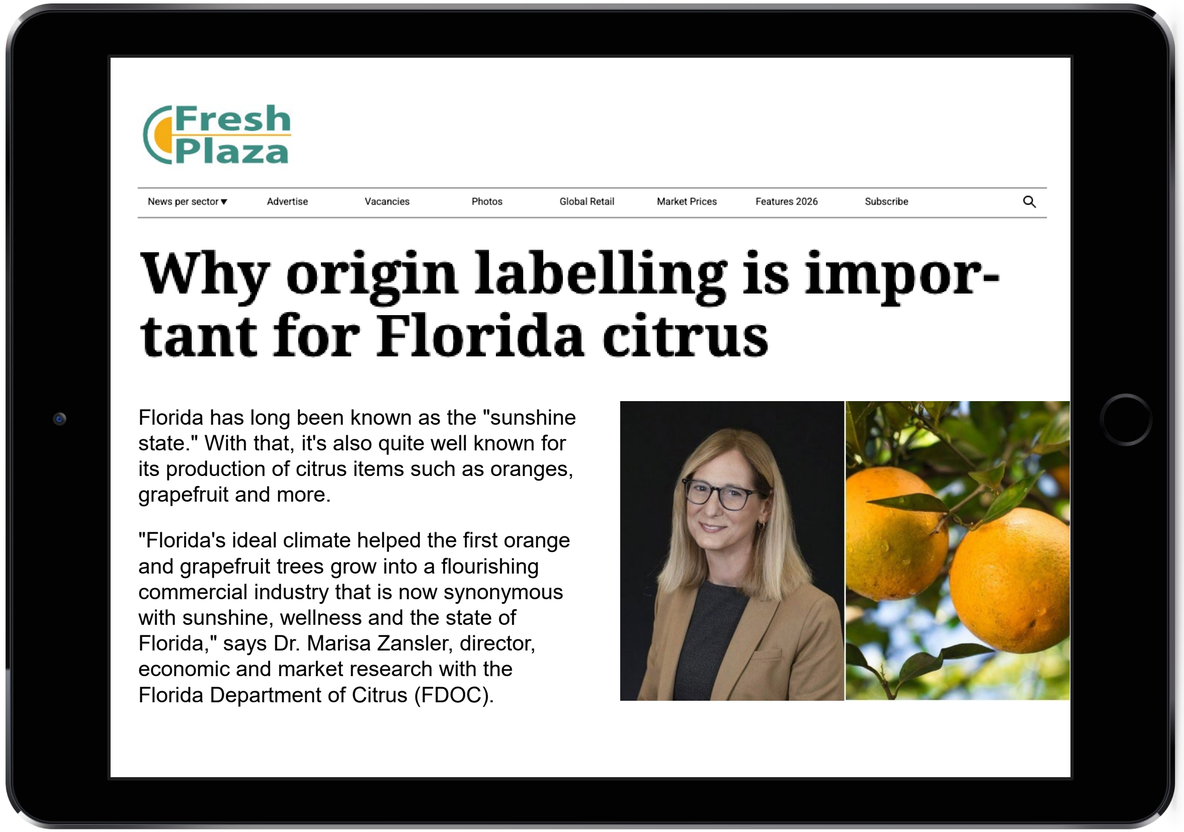
Targeting Retail Decision Makers and Produce Consumers Through Earned Media

Ongoing pitching and high-value trade placements reinforce Florida Citrus origin labeling and the health benefits of fresh citrus, strengthening brand value and generating:

8
Earned Media Placements

35M
Earned Media Impressions

TODAY Prevention TastingTable. health martha stewart



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Fresh Citrus Content in Development



December 2025
Photo Shoot Content



Dedicated Fresh Citrus Shoot
Week of March 23rd, Orlando

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Grapefruit Update



Peak Season Puts Florida Grapefruit in the Spotlight

Seasonal wellness messaging highlights the health benefits of Florida Grapefruit and 100% grapefruit juice, while on-trend recipes inspire new usage occasions across media and social.

127.1M
Media Impressions YTD

5.65M
Impressions YTD

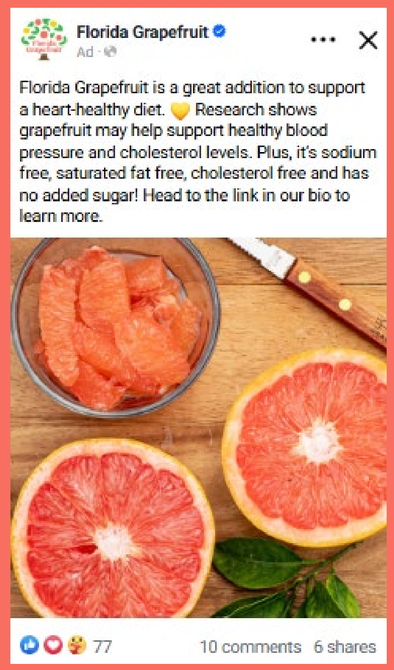
3.59M
Social Impressions

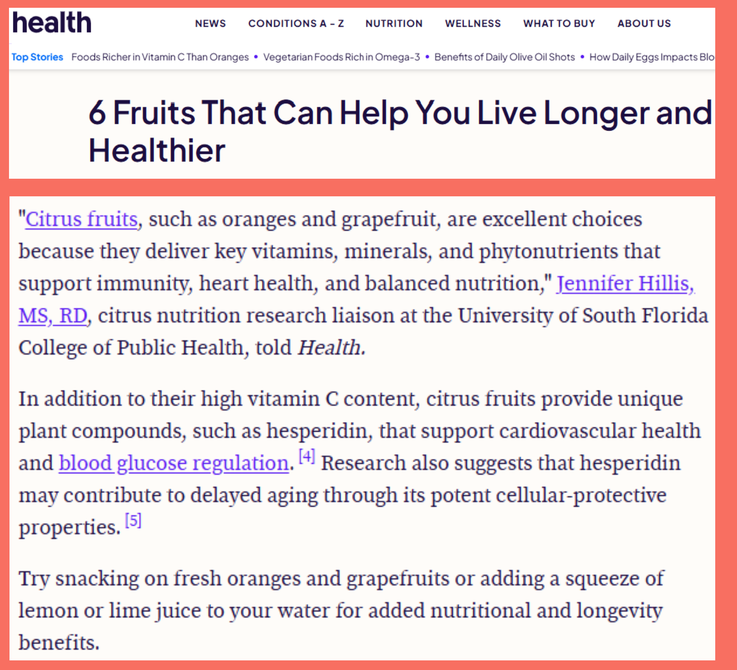
16k
Social Engagements











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Florida Grapefruit Takes the Field for Spring Training in Florida

The MLB Grapefruit League Spring Training partnership kicked off in late February featuring promotions and activations with 6 teams.

30+
In stadium activations

21
In game grower highlights

1.17 million
Broadcast Impressions through 3/7

Tampa

Port St. Lucie

Fort Meyers

Venice

Venice

Sarasota

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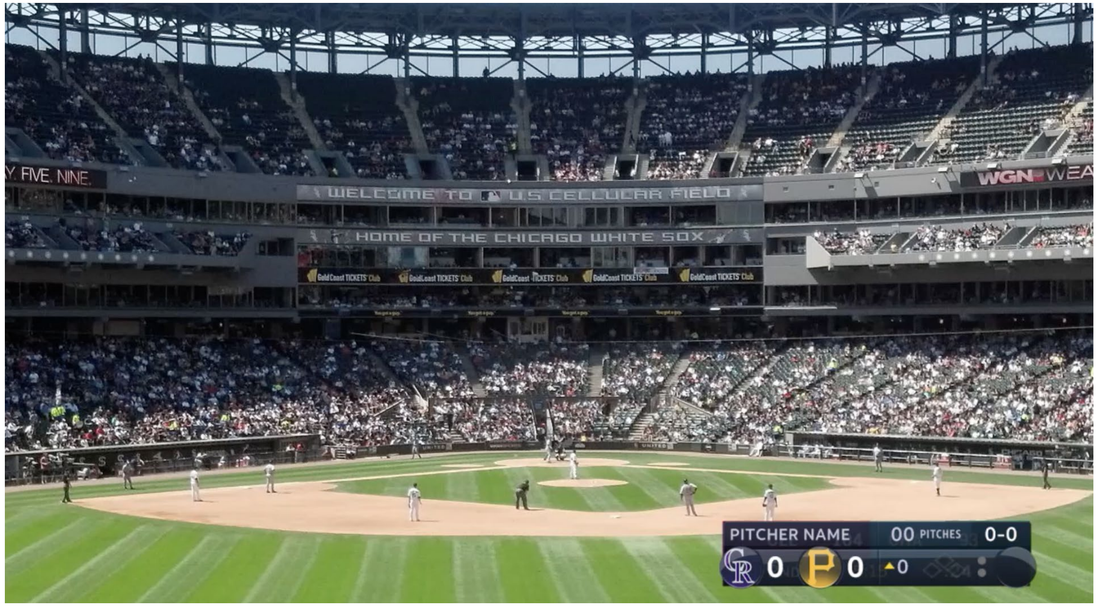








Spotlighting Florida Grapefruit In-Stadiums and on Regional Broadcast during Spring Training



GameFlow Animations



In Stadium & Broadcast Ad

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Fresh Citrus Workshop Recap

Why We Convened

FDOC brought together fresh citrus industry leaders to gather input on the challenges and opportunities facing fresh citrus and to help inform potential future marketing programs.

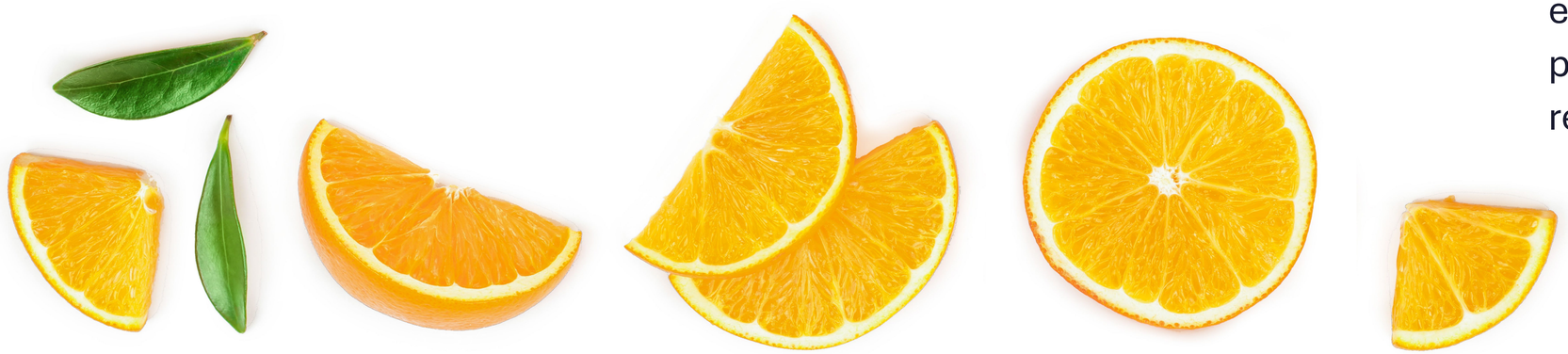
The discussion provides early industry perspective as FDOC explores promotional support for Florida citrus in fresh channels.

What We Heard

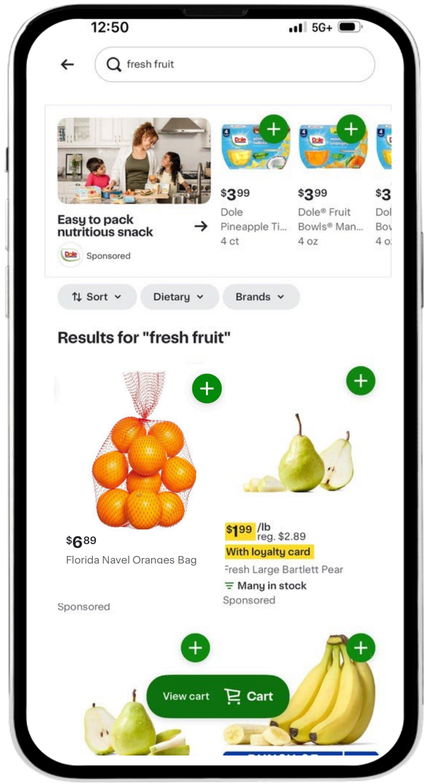
- Declining presence at retail and institutional accounts, with Florida Citrus increasingly replaced by domestic and imported competitors
- Consumer misperceptions around appearance, quality and availability, despite strong fruit quality this season
- Reduced promotional investment over time has contributed to lower consumer awareness and category support

Key Themes for Consideration

- Industry participants expressed strong interest in greater promotional focus on fresh citrus channels
- A Florida-first approach that reconnects consumers and retailers with the value of Florida citrus was widely discussed as a potential path forward
- Near-term opportunities may exist to support current-season product movement while rebuilding consumer awareness



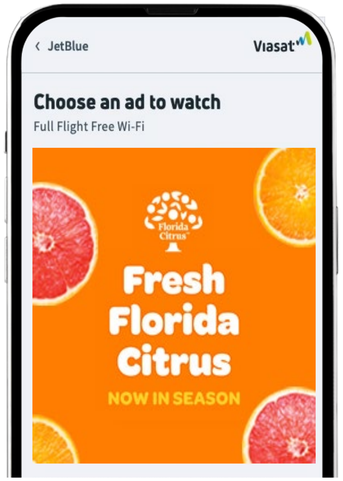
Fresh Citrus Opportunities



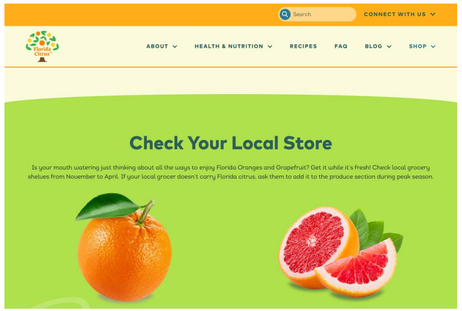
Instacart Test



Fresh Citrus Shoot



Airport Advertising



Fresh Landing Page



Digital Out of Home



Influencers
@taylorjackzen (79k followers)
@colettescocktails (138k followers)

Grapefruit League & Retail Pilot Expansion

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Fresh Citrus Allocation Recommendation

Due to the freeze, FDOC cancelled the grove media event scheduled for February 2026. With the Florida Orange Juice program tracking ahead of its attributed sales goal, $184,000 from the cancelled event and select digital advertising allocations is proposed for Commission approval to support fresh citrus during the current season.

Florida Orange Juice Domestic Program	Fresh Citrus Requested Allocation	Total
FLOJ Grove Media Event	Grapefruit Influencers	$31,500
FLOJ Grove Media Event	Grapefruit League Activation Expansion & Retail Pilot Test	$35,000
FLOJ Grove Media Event	Digital Out of Home Advertising	$50,000
FLOJ Grove Media Event	Expanded Airport Advertising	$15,000
FLOJ Digital Advertising	Fresh Citrus Instacart Test and Airport Advertising	$52,500
TOTAL		**$184,000**

The Fresh Citrus shoot ($140,000), Fresh Citrus landing page ($6,500) and all associated creative ($22,500) needs to support digital out of home, expanded airport advertising and the Instacart test are already included within the domestic Florida Orange Juice budget ($169,000). With your approval, **the total incremental investment for Florida Citrus in FY25-26 will be $353,000.**

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FY26-27 Planning Timeline

Mar 17
Planning Kickoff and Workshops with FDOC Staff

Mar 18
Receive FCC Direction on Strategy and Budget

Mid April
Draft Plan Presented to FDOC Staff for Input

Apr 14-May 13
Plan Revisions and Finalization

May 20
FY26-27 Global Marketing Plan Presented to FCC

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FY26-27 Marketing Strategy & Budget Alignment

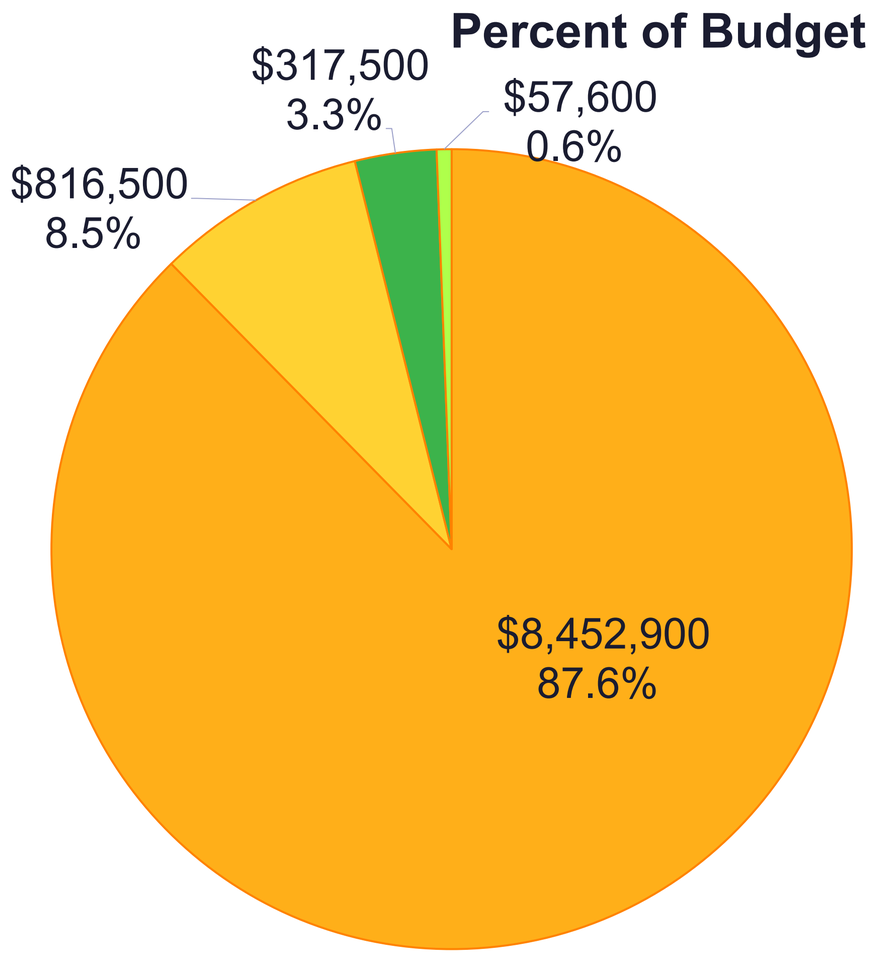
Current Program Strategy

- Build Value & Increase Sales of Florida Orange Juice
- Build Awareness of Fresh Florida Citrus

- Current Approach for Allocation of General Revenue Funds
  - Split by percentage based on utilization of the crop

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12.4% of GR Dedicated to Fresh Citrus



$250,000 of GR goes to the Visit Florida Welcome Centers; not included in this allocation



Staff requests approval to prepare marketing scenarios to be shared with the Commission in May that do not use utilization as the basis for budget allocations.

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Thank You

