



Florida Citrus Season Retrospective: 2025-26 Season Final Season Outlook Update

Prepared by:

Marisa L. Zansler, Ph.D.

Economic and Market Research Department

Florida Department of Citrus

Gainesville, Florida

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**ECONOMIC AND MARKET RESEARCH DEPARTMENT
FLORIDA DEPARTMENT OF CITRUS**

Web Site: www.FloridaCitrus.org/grower/

Bartow Office: 605 East Main Street
P.O. Box 9010
Bartow, Florida 33831-9010 USA

Gainesville Office: 2125 McCarty Hall
P.O. Box 110249
University of Florida
Gainesville, Florida 32611-0249 USA

Telephone: 352-294-7691
E-Mail: mzansler@ufl.edu

Table of Contents

Introduction.....	3
Review of the 2024-25 Florida Citrus Season	4
Florida Orange Crop, Utilization and Movement	6
Florida.....	7
São Paulo	7
Mexico	8
Other U.S. Orange Production.....	9
Orange Juice Production and Availability	9
Florida Orange Juice Inventory and Movement	11
U.S. Orange Juice Supply, Disappearance and Retail Sales.....	14
Florida Fresh Orange Shipments, by Market.....	18
Florida Grapefruit Crop, Utilization and Movement	19
Florida Grapefruit Juice Inventory and Movement	19
U.S. Grapefruit Juice Supply, Disappearance, and Retail Sales.....	21
Fresh Grapefruit Shipments, by Market	25
Florida Specialty Crop and Utilization	26
Summary: Implications for the Florida Grower.....	27
References.....	30
TABLES	31

List of Tables

Table 1. Utilization of world oranges – Selected Countries.	32
Table 2. Utilization of Florida round oranges.	33
Table 3. Comparative utilization of round oranges, Florida, São Paulo, and Mexico.	34
Table 4. Comparative orange juice yields, Florida, Brazil, and Mexico.	35
Table 5. Comparative orange juice production, Florida, São Paulo, and Mexico.	36
Table 6. Total Florida, Brazil, and Mexico OJ availability	37
Table 7. Brazil orange juice exports to select regions.	38
Table 8. U.S. Imports orange juice, by origin and type.	39
Table 9. Total Florida forecasted OJ availability, movement, and carryover for 2025-26, and actual for 2023-24 and 2024-25.	40
Table 10. Florida FCOJ forecasted availability, movement, and carryover for 2025-26, and actual for 2023-24 and 2024-25.	41
Table 11. Florida SSOJ forecasted availability, movement, and carryover for 2025-26, and actual for 2023-24 and 2024-25.	42
Table 12. U.S. orange juice supply and disappearance.	43
Table 13. Florida processor OJ receipts, movement, and inventory, by type.	44
Table 14. Retail orange juice sales.	45
Table 15. Share of 100% orange juice sold on promotion with reported price, by type	46
Table 16. Destination markets for Florida certified fresh orange shipments.	47
Table 17. Utilization of Florida grapefruit.	48
Table 18. Florida FCGJ and SSGF availability, movement, and carryover for 2025-26, and actual for 2023-24 and 2024-25.	49
Table 19. U.S. grapefruit juice production, supply, and disappearance.	50
Table 20. Retail grapefruit juice sales.	51
Table 21. Share of 100% grapefruit juice sold on promotion with reported price, by type.	52
Table 22. Destination markets for Florida certified fresh grapefruit.	53
Table 23. Utilization of Florida fresh specialty.	54
Table 24. Destination markets for Florida certified fresh specialty shipments.	55

Florida Citrus Outlook

2025-26 Season: September Update

Introduction

This report provides the final season update on supply, demand, and price projections of Florida citrus for the 2025-26 season.¹ On Thursday, August 27, 2026, the USDA's National Agricultural Statistics Service (USDA/NASS) revised the preliminary 2025-26 Citrus Production Forecast for the Florida citrus crop, by variety, which provides the baseline for these projections. This report examines utilization of oranges, grapefruit, and specialty citrus in line 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, and preliminary on-tree price estimates. World OJ availability is also presented, given its strong bearing on Florida's OJ situation. Fresh fruit movement projections are included as well. Sensitivity analyses assess alternative scenarios for availability and movement where appropriate.

The preliminary September estimate for the 2025-26 Florida citrus season is 14.76 million boxes, an estimated 6.2% increase 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 increase overall by 4.9% with a total of 130.47 million boxes of oranges, grapefruit, lemons, and specialty citrus from California, Florida, Texas, and Arizona. Specifically, the preliminary forecast projects 63.54 million boxes of oranges, 7.85 million boxes of grapefruit, and 31.46 million boxes of specialty tangerines and tangelos. The USDA forecast also reports

¹ The Federal government shutdown in late 2025 affected the release of several industry reports during the 2025-26 season. This report is subject to revision based on receipt of updated data.

27.62 million boxes of lemons from California, Florida, and Arizona in the 2025-26 season (USDA-NASS, 2026a).

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.²

Review of the 2024-25 Florida Citrus Season

The 2024–25 Florida citrus season faced a sharp downturn following modest gains in the previous 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 expected to be 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.

² USDA National Agricultural Statistics Service, Florida Field Office. “Citrus Production March 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.

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% 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.

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.

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 11.2% with the United States, Brazil, and Mexico expected to produce approximately a combined 526.0 million 90-lb equivalent boxes in the 2025-26 season.

Specifically, the United States is expected to produce 58.0 million 90-lb equivalent boxes, Brazil is expected to produce 352.9 million 90-lb equivalent boxes, and Mexico is expected to produce an estimated 115.1 million 90-lb equivalent boxes in the 2025-26 season. The data suggests that approximately 70.1% of production in these countries will be utilized for processing, which represents a projected 17.3% increase over last season.

The remainder of this section examines utilization within each country.

Florida

The USDA/NASS preliminary September estimate for the 2025-26 Florida round orange crop is 12.95 million boxes, which would represent an increase of 6.1%, equivalent to 0.75 million boxes compared with last season's crop of 12.2 million boxes. Table 1 reports Florida orange box utilization. The 2025-26 early- and mid-season orange crop forecast, including Navel oranges, is 4.77 million boxes, up 0.2 million boxes (an increase of 3.7%) from last season. The fresh Navel orange crop is at nearly 80,000 boxes, representing 1.7% of the early- and mid-season estimate. The Valencia crop is forecast at 8.18 million boxes, a projected 7.6% increase from last season's Valencia production of 7.6 million boxes.

The 2025-26 preliminary estimate suggests that approximately 89.5% of orange production was 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 7.35 million boxes (or 63.5% of total processed utilization) in the 2025-26 season, an increase of 0.19 million boxes from last season. The quantity of orange boxes used in 2025-26 to produce FCOJ is estimated at 4.22 million boxes, an increase of 0.37 million boxes compared with last season's utilization of 3.85 million boxes.

The total juice yield for Florida processed production is roughly estimated to have increased 2 percent to 4.895 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.

São Paulo

Brazil is the leading exporter of orange juice in the world, with the majority of production reaching markets in Europe, North America, 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 27% over the previous season, from 230.9 million 90-lb equivalent boxes to 292.94 million 90-lb equivalent boxes, representing an increase of 62.1 million boxes. 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, with exports increasing incrementally in recent seasons in response to the decline 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 production 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 declines marginally each season, with supplies diverted to processed utilization. With processing occurring from October through April, the orange fruit processing period in Mexico 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.

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 processed production in Mexico decreased by roughly 2.8% over the previous season, from 118.5 million 90-lb equivalent boxes to 115.1 million 90-lb equivalent boxes, representing a reduction of 3.3 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 2.441 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

According to the USDA/NASS citrus production forecast for the 2025-26 season, California is expected to produce 41.0 million 80-lb boxes of non-Valencia oranges and 8.5 million 80-lb boxes of Valencia oranges, for a total of 49.5 million boxes, an increase of 9.5% over the previous season. The USDA preliminary estimate reports 17.3 million 80-lb boxes from California were processed into juice based in the 2025-26 season. The USDA/NASS forecast for Texas orange production in the 2025-26 season is projected to increase by 28.2% to 1.09 million 85-lb boxes. The preliminary estimate of the Texas crop share into processed utilization was estimated at 0.260 million 85-lb boxes. This analysis estimates that up to 15.6 million 90-lb Florida-equivalent boxes of combined California and Texas production was used for orange-juice processing in the United States. The share of single-strength and concentrate is not reported by either state. This analysis projects that orange-juice production may increase by approximately 64.0% from an estimated 41.9 million SSE gallons in the 2024-25 season to 68.8 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 27.3% over the previous period, from 1.16 billion SSE gallons to 1.47 billion SSE gallons due to reduced availability in production from leading suppliers such as São Paulo, Mexico, and the United States (Table 5). Florida production is estimated to contribute 3.9% of orange juice to this total supply this season.

Comparisons of orange juice beginning inventories and production levels for Florida, Brazil, and Mexico are provided in Table 6. Aggregate OJ production from the three leading suppliers in 2025-26 is projected at 1.87 billion SSE gallons, an increase of 384.6 million SSE gallons (or up 25.8% from last season's 1.49 billion SSE gallons), largely due to the decline in juice yields and reduced orange production. 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 1.14 billion SSE gallons of OJ were exported from Brazil in 2025-26, up 3.9% from the 1.09 billion SSE gallons exported in the 2024-25 season. Most of Brazil's orange juice exports are bound for Europe, with shipments to Europe during the 2025-26 season estimated at 539.6 million SSE gallons (representing approximately 47% of all exports), an estimated 2.8% decline over the previous season. The majority of Brazil's exports to Europe are frozen concentrate, representing 67% of the

total in the 2025-26 season 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 down by 19.5% with 61.2 million SSE gallons. Brazil's exports to North American (USMCA) countries were up by 16.2% with 507.5 million SSE gallons, primarily intended for the U.S. market. A declining share, approximately 40%, of these exports in the 2025-26 season were frozen concentrate, used to make reconstituted, shelf-stable, and frozen orange juice, reinforcing a rise in the NFC export market to USMCA.

Table 8 provides a summary of U.S. imports of orange juice by origin and type. For FCOJ, imports through Florida Ports decreased from 222.70 million gallons in the 2024-25 season to 150.74 million gallons in the 2025-26 season (YTD), representing a decrease of 71.96 million gallons. Similarly, imports from Brazil decreased from 155.07 million gallons to 101.13, showing a decrease of 53.94 million gallons. Furthermore, imports from Mexico decreased from 53.77 million gallons to 21.69, representing a reduction of 32.08 million gallons. In total, FCOJ imports declined from 289.41 million gallons in 2024-25 to 200.62 million gallons in 2025-26, indicating a decrease of 88.79 million gallons. For NFC-OJ, imports through Florida Ports declined from 211.66 million gallons in the 2024-25 season to 170.92 million gallons in the 2025-26 season, indicating a decline of 40.74 million gallons. Imports from Brazil, which is a significant contributor to NFC-OJ imports, also fell from 200.24 million gallons to 159.69, representing a decrease of 40.55 million gallons. In total, NFC-OJ imports decreased from 254.59 million gallons in 2024-25 to 206.50 million gallons in 2025-26, indicating a reduction of 48.09 million gallons.

Florida Orange Juice Inventory and Movement

Both demand-side and supply-side factors influencing orange juice availability are analyzed in this section. Florida's orange juice (OJ) situation continued to be hampered by the

historical trend in reduced production levels largely associated with the spread of Huanglongbing (HLB, also known as citrus greening) and weather related events. Concurrently, consumer demand for orange juice may have outpaced juice receipts from the Florida crop and imports during the previous season, guaranteeing that existing inventories will be needed. Simultaneously, the inflationary pressures within the category resulting from shortages and the high cost of production raise concerns that consumers might be opting 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 Florida-Brazil-Mexico OJ availability, and 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 56.7 million SSE gallons, plus estimated imports and other adjustments totaling 469.7 million SSE gallons, Florida's OJ availability in 2025-26 (October 2025 through September 2026) is estimated at 721.2 million SSE gallons, up 25.6 million SSE gallons (or 3.7%) from last season's level. Total movement in 2025-26 is estimated to decline by 61.4 million SSE gallons (or 12.3%) to 439.3 million SSE gallons from last season. By the end of the 2025-26 season, Florida's OJ ending inventory is estimated to increase to 281.9 million SSE gallons (or 33.4 weeks of supply) associated with a decline in availability. Import quantities will most likely be influenced by 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 238.6 million SSE gallons (28.2 weeks supply) to 325.2 million SSE gallons (38.5 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 revises initial projections from January 2026 and now assumes approximately 36.4% 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 20.6 million SSE gallons based on an estimated utilization of 4.22 million boxes of round oranges and an average FCOJ juice yield of 4.87 gallons per box in the 2025-26 season. Imports of FCOJ, which is used to make Recon, Shelf-stable, and Frozen orange juice, are projected to decrease by 13.2% to 196.7 million SSE gallons. Total overall FCOJ availability is projected to increase by 5.9% when compared to the 2024-25 season. Total movement is projected to decline by at least 17.2% as a result of the decline in availability. Based on the estimated utilization, receipts, and movement trends, FCOJ ending inventories are projected to increase by the end of the season to approximately 178.5 million SSE gallons (or 52.4 weeks of supply).

Preliminary estimates suggests that approximately 63.5% of Florida processed orange utilization during the 2025-26 season was 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 36.1 million SSE gallons

based on an estimated utilization of 7.35 million boxes of round oranges and an average juice yield of 4.91 SSE gallons per box, which would be a increase of 3.2% 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 5.8% when compared to the 2024-25 season. Total movement, including EVAP into Recon, is projected to decline by at least 3.6% 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 98.5 million SSE gallons (or 21.2 weeks of supply).

U.S. Orange Juice Supply, Disappearance and Retail Sales

The volume of orange juice disappearance, derived from: 1) comprehensive inventory data tracking, 2) orange juice produced from the current crop, 3) imports, 4) exports, and 5) 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 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.

Disappearance is used in this analysis to discuss orange juice availability to meet demand. Preliminary estimates of total U.S. orange juice disappearance are projected at 586.7 million SSE gallons for the 2025-26 season, a projected decline of 0.8% from an estimated 591.5 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 compared to the 2024-25 season. Total U.S. orange juice production is estimated at 124.6 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 576.4 million SSE gallons, a projected increase of 2.8% over the previous season. The projected increase in total U.S. imports may reflect increase imports of NFC OJ offsetting decline in FCOJ imports for all processors in the United States. U.S. exports are projected at 29.5 million SSE gallons, a 20.6% 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 12% of SSOJ and 9% of FCOJ receipts by processors, respectively. Specifically, Florida processors are expected to receive 36.1 million gallons of SSOJ from Florida production and 270.9 million gallons from other sources. Florida processors are expected to receive 21.5 million gallons of FCOJ from Florida's orange crop with a remaining 217.7 million gallons from other sources. The majority of SSOJ movement from Florida processors is packaged, 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 was largely dependent upon juice availability, market contraction, and substitutes not yet fully assessed, including OJ blends and OJ drinks.

Overall, preliminary estimates of retail prices are projected to increase across all OJ categories in 2025-26. Under Scenario 2 (the mid-price projection), the average OJ retail price is estimated to rise from \$11.07 per equivalent gallon in 2024-25 to \$11.81 per equivalent gallon in 2025-26, a 7% increase. In 2025-26, the preliminary estimate of orange juice sales within Nielsen retail outlets is 274.5 million equivalent gallons at that price, down 4.5% from the previous season's 287.56 million SSE gallons, based on an average price of \$11.81 per equivalent gallon.

Estimates of sales by segment (FCOJ, NFC, and RECON) are also shown in Table 14. The preceding preliminary estimates represent a 67.2% NFC market share of total OJ category sales volume, a RECON market share of 27.2% of total OJ category sales volume, an FCOJ market share of 2.9% of total OJ category sales volume, with the remaining share allocated to shelf-stable. 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 2025-26 season.

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

Table 15 summarizes retail orange juice promotions across multiple store formats, including grocery stores, mass merchandisers, and others, for the 2022-23 through 2025-26 seasons. During the 2025-26 season, promotional activity for NFC orange juice accounted for 29.4% of total sales, which is a significant increase from 22.2% in the 2024-25 season. Promotional activity for NFC OJ in the 2025-26 may have boosted sales amid high inflation.

Recon orange juice saw promotional activity at 30.9% of total sales in 2025-26, compared to 23.1% in the previous season, also a significant increase. However, overall volume movement remained below the previous season despite price decreases.

Overall, total promotional sales represented 28.9% of all orange juice sales during 2025-26, compared to 21.7% in 2024-25. For orange juice sold without promotions, NFC sales were at 70.6% of total sales in 2025-26, compared to 77.8% in the previous season. Recon orange juice accounted for 69.1% of non-promotional sales in 2025-26, which is slightly lower compared to 76.9% in 2024-25. Total non-promotional sales decreased from 78.3% in 2024-25 to 71.1% in 2025-26. The average price for NFC orange juice sold on promotion increased from \$10.61 per SSE gallon in 2024-25 to \$11.28 in 2025-26. Recon orange juice sold on promotion had an average price of \$8.79 in 2025-26, compared to \$8.57 in 2024-25. For non-promotional sales, NFC orange juice was priced at \$13.54 per SSE gallon in 2025-26, compared to \$12.29 in the previous season, while Recon prices changed from \$9.63 to \$9.78 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 10.1% of total orange production during the 2025-26 season. Certified fresh orange shipments in 2025-26 are estimated at 1.31 million boxes (equivalent to 2.61 million cartons), which would be an increase of 30.8% from the 1.00 million boxes (equivalent to 2.00 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 2.59 million cartons, up by 623,799 cartons. The domestic share is projected to be about 99% of all Florida fresh orange shipments in 2025-26. Florida packers are projected to export 25,119 cartons of fresh oranges during the 2025-26 season, representing a decline of 24.9% compared to last

season. Accounting for 43% of all exports, Canada was the leading destination of Florida fresh oranges.

Within the domestic market, South represents the largest share of Florida fresh orange movement at approximately 44.6%, followed by Northeast at 27.8%, Central at 21.9%, and West at 5.7%. Compared to last season, fresh orange movement to the South is projected to increase by approximately 31.4%, while movement to the Northeast is projected to increase by approximately 18.6%. Central movement is projected to increase by approximately 22.6%, while movement to the West is projected to increase by approximately 833.3% compared to last season.

Florida Grapefruit Crop, Utilization and Movement

The USDA/NASS preliminary September estimate of the Florida grapefruit crop in 2025-26 is 1.35 million boxes, an increase of 3.8% from last season's crop of 1.30 million boxes (Table 17). Certified fresh grapefruit shipments are estimated to be 779,590 boxes in 2025-26, which would represent a decline of about 11% compared to certified fresh utilization last season. Non-certified fresh utilization is estimated at 31,410 boxes in 2025-26. Processed utilization is projected to account for approximately 38% of the total crop and is estimated at 518,695 boxes, up by 37.5% 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 100% of processed utilization this season, which represents an increase of about 38.2% compared to last season.

Florida Grapefruit Juice Inventory and Movement

Preliminary projections for the Florida OJ situation (October-September season) are shown in Table 18. Florida processors began the 2025-26 season with 4.92 million SSE gallons of GJ in inventory (24.5 weeks supply), down from the previous season's level of 6.57 million SSE gallons

(28.3 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 8.16 million SSE gallons, up 1.23 million SSE gallons from last season. Combining production with beginning inventories, GJ availability in 2025-26 is estimated at 13.1 million SSE gallons, down by 3.2% and representing a decrease of 0.43 million gallons from last year. GJ movement in 2025-26 is estimated at 9.64 million SSE gallons, down 4.5% from last year. The 2025-26 ending inventory for Florida GJ is estimated at 3.44 million SSE gallons (or 18.6 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 utilized 100% of processed grapefruit for SSGJ (or GJ NFC). Beginning inventory of SSGJ for the 2025-26 season was 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 2.60 million SSE gallons based on an estimated 0.52 million boxes of grapefruit and a juice yield of 5.014 SSE gallons per box, representing a 23.8% increase in pack from fruit over the previous season.

Total availability of Florida FCGJ in the 2025-26 season is projected at 1.95 million SSE gallons, which represents a decline of 29.2% compared to the 2024-25 season. Beginning inventories were down from 2.30 million SSE gallons to 1.62 million SSE gallons in 2025-26, indicating continued tightness in carryover stocks. Imports are projected to increase to 1.31 million SSE gallons from 1.01 million SSE gallons in the prior season, helping to offset zero pack-from-fruit volume and net loss/gains. Despite the rise in imports, ending inventories for the 2025-26 season are expected to tighten to 0.57 million SSE gallons compared to 1.62 million SSE gallons

in 2024-25. Overall, movement of FCGJ increased 21 percent from 1,14 million gallons in 2024-25 to a projected 1.38 million gallons in 2025-26.

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 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 14.84 million SSE gallons in 2025-26, compared to 16.50 million SSE gallons in the previous season (Table 19). Disappearance is expected to decline by 10% 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 14.09 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 4.81 million SSE gallons, a decrease of 15% over the previous

season. U.S. exports are projected at 3.53 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 5.0% to 2.10 million 80-lb boxes. The Texas crop share into processed utilization could represent as many as 0.86 million 80-lb boxes. This analysis estimates that as many as 2.29 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 13.2% from an estimated 10.2 million SSE gallons of orange juice in the 2024-25 season to 11.5 million SSE gallons in the 2025-26 season.

In addition to GJ prices, retail GJ sales during the 2025-26 season were largely dependent on availability, overall market growth or contraction, and the presence of substitutes over the previous several years. 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 \$11.91 per SSE gallon in 2024-25 to \$12.22 per SSE gallon in 2025-26, a 2.6% increase in the average retail price. At this price level, grapefruit juice sales within Nielsen retail outlets are projected to total approximately 8.5 million equivalent gallons, representing a

7.8% 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 \$11.91 per SSE gallon in 2024-25 to \$12.26 per SSE gallon in 2025-26, a 2.9% increase in retail price. At this price level, orange juice sales within Nielsen retail outlets are projected to total approximately 8.5 million equivalent gallons, representing an 8.2% decline in volume compared to the previous season. Scenario 3 (low price): the average retail GJ price is projected to increase from \$11.91 per SSE gallon in 2024-25 to \$12.16 per SSE gallon in 2025-26, a 2.1% increase in retail price. At this price level, orange juice sales within Nielsen retail outlets are projected to total approximately 8.6 million equivalent gallons, representing a 7.3% 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 64% NFC market share of total GJ category retail sales volume, RECON market share estimated at 4% of total retail GJ sales volume, Frozen GJ market share estimated at 1% of total retail GJ sales volume, and a remaining 31% share allocated to Shelf Stable GJ.

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 feature 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 thirteen 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 21 summarizes retail grapefruit juice promotions across multiple store formats, including grocery stores, mass merchandisers, and others, for the 2024-25 and 2025-26 seasons. During the 2025-26 season, promotional activity for NFC grapefruit juice accounted for 35.5% of total sales, which is an increase from 30.3% in the 2024-25 season. Recon grapefruit juice saw promotional activity at 11.2% of total sales in 2025-26, compared to 11.2% in the previous season, indicating little change. Overall, total promotional sales represented 26.7% of all grapefruit juice sales during 2025-26, compared to 24.2% in 2024-25. For grapefruit juice sold without promotions, NFC sales were at 64.5% of total sales in 2025-26, compared to 69.7% in the previous season. Recon grapefruit juice accounted for 88.8% of non-promotional sales in 2025-26, unchanged from 88.8% in 2024-25. Total non-promotional sales decreased from 75.8% in 2022-23 to 73.3% in 2023-24. The average price for NFC grapefruit juice sold on promotion increased from \$10.56 per SSE gallon in 2024-25 to \$10.71 in 2024-25. Recon grapefruit juice sold on promotion had an average price of \$11.19 in 2025-26, compared to \$10.58 in 2024-25. For non-

promotional sales, NFC grapefruit juice was priced at \$14.32 per SSE gallon in 2023-24, compared to \$13.55 in the previous season, while Recon prices changed from \$9.11 to \$9.03 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 58% of total grapefruit production during the 2025-26 season, down from a 67% share last season. Certified fresh grapefruit shipments in 2025-26 are currently estimated at 0.78 million boxes (equivalent to 1.56 million cartons), representing a decline of approximately 10.6% compared to last season. Domestic fresh grapefruit shipments are projected at approximately 1.49 million cartons and account for nearly 96% of total fresh grapefruit movement. Export shipments are projected at approximately 64,758 cartons, accounting for about 4% of total movement. While both domestic and export movement are projected to decline from last season, the export movement change is greater, further increasing the share of fresh grapefruit moving through the domestic market. Canada remains the leading export destination, accounting for approximately 61% of Florida fresh grapefruit exports.

Within the domestic market, South represents the largest share of Florida fresh grapefruit movement at approximately 55.9%, followed by Northeast at 32.9%, Central at 7.8%, and West at 3.4%. Compared to last season, fresh grapefruit movement to the South is projected to decline by approximately 10.8%, while movement to the Northeast is projected to decline by approximately 10.1%. Central movement is projected to decline by approximately 24.9%, while movement to the West is projected to increase by approximately 148.8% compared to last season.

Florida Specialty Crop and Utilization

The USDA/NASS preliminary September estimate of the Florida specialty crop in 2025-26 is 460,000 boxes, an increase of 60,000 boxes from last season (Table 23). The USDA/NASS 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 61% of the crop with an estimated 279,586 boxes (equivalent to 559,171 million cartons) moving during the 2025-26 season to primarily the domestic market (Table 24). Domestic fresh specialty shipments are projected at 554,249 cartons, up by 193,865 cartons. The domestic share represents 99.1% of annual shipments. Florida packers are projected to export approximately 4,922 cartons of fresh specialty fruit during the 2025-26 season, representing an increase of 0,671 cartons over last season. Accounting for 81% of exports, Canada is the leading destination of Florida fresh specialty.

Within the domestic market, South represents the largest share of Florida fresh specialty movement at approximately 59.2%, followed by Northeast at 23.2%, West at 11.3%, and Central at 6.2%. Compared to last season, fresh specialty movement to the South is projected to increase by approximately 53.7%, while movement to the Northeast is projected to increase by approximately 61.9%. Central movement is projected to increase by approximately 27.6%, while movement to the West is projected to increase by approximately 53.2% compared to last season.

Summary: Implications for the Florida Grower

The USDA September 2026 preliminary forecast projects an overall 6% increase in Florida's production with a total production estimate of 14.76 million boxes of oranges, grapefruit, and specialty citrus.

The 2025-26 Florida orange crop at 12.95 million boxes, an increase of 6.1%, or equivalent to 0.8 million boxes compared to last season's crop of 12.2 million boxes. The 2025-26 early and mid-season orange crop forecast, including Navel oranges, is 4.77 million boxes, up 0.17 million boxes (or an increase of 3.7%) from last season. The navel orange crop is forecasted at 80,000 boxes, representing 1.7% of the total early and mid-season orange crop estimate. The Valencia crop is forecasted at 8.2 million boxes, a projected 7.6% increase over last season's Valencia production of 7.6 million boxes.

Trends in utilization reveal a higher share of the orange crop utilized on the fresh market. Certified fresh orange utilization is projected to account for approximately 10.1% of total orange production during the 2025-26 season. Certified fresh orange shipments in 2025-26 are estimated at 1.31 million boxes (equivalent to 2.61 million cartons), which would be an increase of 30.8% from the 1.00 million boxes (equivalent to 2.00 million cartons) shipped last season. Domestic fresh orange shipments are projected at 2.59 million cartons, up by 623,799 cartons. The domestic share is projected to be about 99% of all Florida fresh orange shipments in 2025-26. Florida packers are projected to export 25,119 cartons of fresh oranges during the 2025-26 season, representing a decline of 24.9% compared to last season. Accounting for 43% of all exports, Canada was the leading destination of Florida fresh oranges.

Approximately 89.5% of Florida's orange production was 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 7.35 million boxes (or 63.5% of total processed utilization) in the 2025-26 season, an increase of 0.19 million boxes from last season. The quantity of orange boxes used in 2025-26 to produce FCOJ is estimated at 4.22 million boxes, an increase of 0.37 million boxes compared to last season's utilization of 3.85 million boxes.

The preliminary September estimate of the Florida grapefruit crop in 2025-26 is 1.35 million boxes, an increase of 3.8%. Approximately 38% of Florida's certified grapefruit was utilized on the processed market, a slightly higher share compared to last season. Processed utilization is projected is estimated at 518,695 boxes, all used to make NFC GJ, up by 37.5% compared to the 2024-25 season. Certified fresh grapefruit shipments are estimated to be 779,590 boxes in 2025-26, which would represent a decline of about 11% compared to certified fresh utilization last season.

The 2025-26 Florida specialty citrus crop is forecast at 460,000 boxes, up 60,000 from last year. Certified fresh shipments are expected to represent 61% of production, totaling near 280,000 boxes, primarily for the domestic market.

For growers, the economic environment presents both risks and opportunities. On the supply side, increased production is an encouraging sign. Yet, lower per acreage yields, lower juice yields, and shrinking exports are expected to limit returns. On the demand side, signs of the resiliency of NFC orange juice are a promising indication of consumer awareness of the value of 100% orange juice. At the same time, inflation and price volatility threaten to shape consumer behavior, creating uncertainty in both fresh fruit and processed juice markets. To navigate these pressures, Florida citrus will need to accelerate replanting, strengthen infrastructure, and sustain investment in consumer-focused marketing to preserve competitiveness and reinforce the crop's

economic value to Florida's communities. To mitigate these challenges, Florida's citrus industry must prioritize tree replanting initiatives, enhance industry infrastructure, and invest in consumer-driven marketing strategies to maintain market competitiveness and reinforce the value of Florida citrus in the State's overall economy.

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TABLES

Table 1. Utilization of world oranges – Selected Countries.

Season	United States			Brazil ^b			Mexico		
	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	56.5	32.7	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	121.1	64.6	56.4
2024-25	53.2	32.6	20.6	301.3	61.2	240.1	118.5	64.9	53.6
2025-26 ^f	56.5	33.7	22.8	301.3	63.5	237.8	123.7	67.4	56.3
2025-26 ^p	58.0	30.8	27.2	352.9	60.0	292.9	115.1	66.6	48.5

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 January 2026. The Foreign Agricultural Service GAIN report for Brazil was not published in June 2026 as of this writing.

^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
millions 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
2024-25	1.00	3.85	7.16	11.16	0.07	0.15	12.20
2025-26 ^f	1.033	3.799	7.093	---	0.075	<0.000	12.000
2025-26 ^p	1.306	4.220	7.354	11.59	0.057	0.013	12.950

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	39.3	267.9	121.1	63.8	56.4
2024-25	12.2	1.1	11.1	230.9	36.1	194.8	118.5	64.5	53.6
2025-26 ^f	12.0	1.1	10.9	314.6	48.2	266.4	79.9	42.3	37.6
2025-26 ^p	13.0	1.4	11.6	292.9	36.0	256.9	115.1	66.2	48.5

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 may overstate production based on additional industry sources in Mexico.

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

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

Season	Florida ^a	São Paulo ^b SSE gal/box	Mexico ^c
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	3.47674
2024-25p	4.79398	4.78756	2.24886
2025-26f	4.67398	5.24781	4.41493
2025-26p	4.89526	5.24781	2.44060

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	120.5	1,155.0
2025-26f	50.9	1,342.4	248.7	1,642.1
2025-26p	56.7	1,294.9	118.4	1,469.9

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			Avail Change
	Beg.	Prod.	Beg.	Prod.	Beg.	Prod.	Beg.	Prod.	Avail	
	Inv.		Inv.		Inv.		Inv.			
- 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	196.22	306.71	1,623.59	1,930.30	-4.33%
2024-25p	165.65	53.69	165.01	981.72	2.79	120.53	333.45	1,156.37	1,489.82	-22.82%
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%
2025-26p	194.86	56.66	206.87	1,294.88	2.79	118.37	404.51	1,469.91	1,874.42	25.82%

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			Europe			East Asia	All Else	Total
	Concentrate	NFC	Total	Concentrate	NFC	Total	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
2025-26f	196.90	302.05	498.95	282.52	125.27	407.79	38.51	17.44	962.68
2025-26p	201.56	305.92	507.48	359.61	180.01	539.61	61.17	28.44	1,136.70

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

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

FCOJ	2021-22	2022-23	2023-24	2024-25	2025-26Ytd
- million SSE gallons -					
Florida Ports	178,446,659	158,497,552	198,685,306	222,701,732	150,744,665
BRAZIL	32,850,373	69,958,251	79,800,432	155,070,865	101,134,214
MEXICO	118,417,894	64,719,012	99,966,308	53,765,375	21,688,286
COSTA RICA	25,786,273	22,379,546	16,956,870	10,810,046	24,756,983
BELIZE	102,830	2,839	20,060	0	0
Rest of World	1,289,289	1,437,905	1,941,637	3,055,446	3,165,183
Rest of US	82,490,093	122,942,500	78,182,183	66,708,200	49,872,526
BRAZIL	62,677,270	96,554,827	58,167,655	36,315,608	31,202,211
MEXICO	13,839,183	15,895,874	12,157,965	14,662,414	6,188,226
COSTA RICA	1,282,144	609,486	217,145	1,790,396	1,528,362
BELIZE	0	1380	0	0	0
Rest of World	4,691,496	9,880,933	7,639,419	13,939,782	10,953,728
FCOJ Total	260,936,753	281,440,051	276,867,490	289,409,931	200,617,191
NFC-OJ	2021-22	2022-23	2023-24	2024-25	2025-26Ytd
Florida Ports	124,805,596	241,593,915	220,147,007	211,656,373	170,918,505
BRAZIL	108,008,020	224,970,070	207,544,129	200,240,900	159,694,417
MEXICO	16,512,468	16,037,569	12,019,572	9,997,944	10,306,254
Rest of World	285,108	586,276	583,306	1,417,528	917,833
Rest of US	56,020,535	45,453,332	56,708,488	59,505,368	267,742,544
BRAZIL	38,887,017	39,702,614	41,511,752	42,937,291	35,583,552
MEXICO	15,655,190	4,883,788	14,100,867	14,966,562	11,587,375
Rest of World	1,478,329	866,930	1,095,869	1,601,515	220,571,618
NFC-OJ Total	163,692,613	281,296,529	261,658,760	254,593,664	206,502,057

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	2024-25	2025-26p		
			Low ^b	Mid	High ^c
- millions 11.8° Brix gallons -					
Beginning Inventory ^a	184.10	165.65	194.86	194.86	194.86
Production ^a	77.26	54.12	56.66	56.66	56.66
Imports ^d	414.45	424.84	389.88	433.20	476.52
Other adjustments ^e	48.45	50.97	36.50	36.50	36.50
Availability	724.25	695.57	677.90	721.22	764.54
Total Movement	558.60	500.72	439.32	439.32	439.32
Domestic	535.29	485.84	438.71	438.71	438.71
Export	7.57	0.76	0.61	0.61	0.61
Ending Inventory	165.65	194.86	238.58	281.90	325.22
- weeks supply -					
Carryover	15.9	20.8	28.2	33.4	38.5

^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 2023-24 and 2024-25.

Item	2023-24	2024-25	2025-26f	2025-26p
FCOJ	- million SSE gallons -			
Beginning Inventory	68.40	71.86	120.88	120.88
Pack	16.25	17.83	17.21	20.56
Other Sources	230.20	249.76	214.62	217.72
Imports	214.12	226.57	191.80	196.66
FCTJ	3.37	4.68	4.02	2.89
Evap	11.10	18.73	20.41	18.95
Net loss/gain	1.61	-0.21	(1.61)	-0.78
Total FCOJ Availability	314.85	339.15	352.71	359.17
Total FCOJ Movement	243.42	218.26	191.32	180.64
By Form				
Retail	6.54	5.20	4.54	4.77
Institutional	43.69	41.21	36.01	42.91
Bulk	193.19	171.86	150.76	132.97
By Market				
Domestic	236.37	217.77	191.25	180.30
Export	7.05	0.49	0.06	0.34
Ending Inventory	71.86	120.88	161.40	178.53
Carryover	15.4	28.8	44.7	52.4

p = preliminary based on 47-weeks 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 2023-24 and 2024-25.

Item ^a	2023-24	2024-25	2025-26f	2025-26p
SSOJ				
	----- million SSE gallons -----			
Beginning Inventory	115.70	93.80	73.97	73.97
Pack From Fruit	59.49	34.97	33.70	36.10
Other Sources	218.04	213.55	250.03	251.98
Imports ^b	200.33	198.27	236.54	236.54
Recon ^c	33.78	38.61	39.04	37.14
Net loss/gain	(16.07)	(23.34)	(25.55)	(21.70)
Total SSOJ Availability	393.23	342.31	357.70	362.05
Total SSOJ Movement	299.44	268.34	245.63	258.68
By Form				
Packaged	279.86	258.57	258.57	229.18
Bulk	19.58	9.77	9.77	16.46
NFC By Market				
Domestic	298.92	268.07	268.27	258.41
Export	0.52	0.27	0.07	0.27
Ending Inventory	93.80	73.97	73.97	103.37
Bulk Ending Inventory ^d	89.77	68.49	68.49	98.54
	----- weeks supply -----			
Carryover	16.3	14.3	24.2	21.1
Bulk Carryover ^d	15.6	13.3	23.1	20.2

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 n ^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	
2024-25 ^p	186.90	94.85	560.57	37.13	213.67	591.51	1.75	
2025-26 ^f	213.7	101.3	558.9	29.3	290.0	554.6	1.60	
2025-26 ^p	213.67	124.63	576.36	29.47	298.45	586.75	1.72	

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 -----						
<u>FCOJ</u>						
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	186.14	7.05	4.54
2024-25	19.14	249.76	46.41	171.37	0.49	50.64
2025-26 ^f	18.19	214.62	40.56	150.76	0.06	41.42
2025-26 ^p	21.53	217.72	47.67	132.97	0.34	58.28
<u>SSOJ</u>						
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)
2024-25 ^p	34.97	213.55	258.57	9.71	0.07	(19.82)
2025-26 ^f	33.70	270.44	229.18	16.46	0.00	58.50
2025-26 ^p	36.10	270.93	242.47	16.20	0.27	48.08

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 ^c	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	201.1	97.3	10.9	8.9	318.3
2023-24	189.9	81.1	9.7	6.9	287.6
2024-25^f	179.04	92.78	9.18	8.15	289.16
2025-26^p					
High Price	179.1	69.6	8.0	6.1	245.8
Mid-Price	184.6	74.7	8.1	4.4	274.5
Low Price	186.4	78.5	8.3	6.2	272.5
Price^b					
----- \$ per SSE gallon -----					
2016-17	7.67	5.15	4.93	8.67	6.69
2017-18 ^c	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	10.46	7.96	7.55	9.86	9.58
2024-25^f	11.92	9.38	8.47	11.02	11.07
2025-26^p					
High Price	13.01	9.57	8.67	12.41	11.95
Mid-Price	12.88	9.47	8.59	12.29	11.81
Low Price	12.83	9.43	8.55	12.23	11.73

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	2022-23	2023-24	2024-25	2025-26S-Ytd
Share - Any Promo^a	----- % of total sales -----			
NFC	28.9%	29.5%	22.2%	29.4%
RECON	24.5%	22.1%	23.1%	30.9%
TOTAL	26.0%	26.0%	21.7%	28.9%
Share - No Promo	----- % of total sales -----			
NFC	71.1%	70.5%	77.8%	70.6%
RECON	75.5%	77.9%	76.9%	69.1%
TOTAL	74.0%	74.0%	78.3%	71.1%
Any Promo Price	----- \$ per SSE gallon -----			
NFC	\$9.36	\$9.44	\$10.61	\$11.28
RECON	\$6.50	\$7.42	\$8.57	\$8.79
TOTAL	\$8.25	\$8.87	\$9.96	\$10.54
No Promo Price	----- \$ per SSE gallon -----			
NFC	\$10.75	\$10.88	\$12.29	\$13.54
RECON	\$6.92	\$8.12	\$9.63	\$9.78
TOTAL	\$9.00	\$9.83	\$11.37	\$12.34

^aShare 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	Exports		Domestic				TOTAL ^b	
(Aug-July)	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
2025-26p	0.01	0.01	1.15	0.72	0.57	0.15	2.61	1.31

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
----- millions 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
2024-25 ^p	0.872	0.002	0.375	0.017	0.034	1.300
2025-26 ^f	0.828	0.002	0.346	0.017	0.007	1.200
2025-26 ^p	0.780	0.000	0.519	0.031	0.020	1.350

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 2023-24 and 2024-25.

Item	2023-24	2024-25	2025-26f	2025-26p
FCGJ		--- million SSE gallons ---		
Beginning Inventory	3.37	2.30	1.62	1.62
Pack From Fruit	--	--	--	--
Imports/Dom Receipts ^b	0.80	1.01	0.85	1.31
Other adjustments ^a	(0.07)	(0.55)		(0.98)
Total FCGJ Availability	<u>4.10</u>	<u>2.75</u>	<u>2.56</u>	<u>1.95</u>
Movement	<u>1.88</u>	<u>1.14</u>	<u>0.92</u>	<u>1.38</u>
Ending Inventory	2.30	1.62	1.16	1.62
Carryover (weeks supply)	63.4	74.0	67.1	25.0
SSGJc		--- million SSE gallons ---		
Beginning Inventory	6.20	4.28	3.30	3.30
Pack from Fruit	3.03	2.10	1.60	2.60
Imports/Dom Receipts ^b	6.63	5.68	5.59	6.12
Total SSGJ Availability	<u>15.86</u>	<u>12.06</u>	<u>10.50</u>	<u>12.02</u>
Movement – Domestic	9.99	8.76	6.85	8.26
Movement– Export ^{d,e}	0.18	0.15	0.15	0.15
Total SSGJ Movement	<u>10.02</u>	<u>8.76</u>	<u>6.85</u>	<u>8.26</u>
Bulk Ending Inventory	5.66	3.15	3.49	3.57
		--- Weeks supply ---		
Bulk Carryover ^f	22.3	19.6	27.6	23.3
TOTAL GJ				
Beginning Inventory	9.58	6.57	4.92	4.92
Production and Imports ^a	9.57	6.94	6.80	8.16
Total GJ Availability	<u>19.15</u>	<u>13.51</u>	<u>11.72</u>	<u>13.08</u>
Movement- Domestic	11.85	9.84	7.77	9.49
Movement- Export	0.03	0.06	0.01	0.15
Total GJ Movement	<u>11.88</u>	<u>9.90</u>	<u>7.77</u>	<u>9.64</u>
Bulk Ending Inventory	7.98	4.77	3.95	3.44
		--- Weeks supply ---		
Carryover	35.0	25.0	26.9	18.9

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.

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
Millions SSE gallons							
2006-07 ^f	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	13.95	38.92	12.26	5.95	17.78	41.40	0.13
2019-20 ^e	17.84	30.34	4.98	5.09	19.46	28.60	0.09
2020-21 ^f	19.46	18.37	2.82	5.03	23.45	18.84	0.06
2021-22	23.57	24.51	4.05	5.30	15.33	31.51	0.09
2022-23	15.33	15.68	8.90	3.92	10.46	25.53	0.08
2023-24	10.46	15.65	7.24	4.39	8.89	20.08	0.06
2024-25 ^p	8.89	12.06	5.66	4.03	6.07	16.50	0.05
2025-26 ^f	6.1	12.4	6.7	4.5	6.1	14.5	0.04
2025-26 ^p	6.08	14.09	4.81	3.53	6.60	14.84	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 included 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 estimates, 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 2004-05 and thereafter Florida bulk NFC inventory and production adjusted by FCPS to 10.0° Brix gallons.

^g 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 ^b	8.47	0.18	2.97	0.42	12.04
2021-22 ^b	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	6.96	0.18	2.83	0.02	9.99
2024-25^b	6.33	0.22	2.71	0.01	9.27
2025-26^p					
High Price	5.52	0.31	2.64	0.04	8.51
Mid Price	5.54	0.31	2.65	0.04	8.54
Low Price	5.57	0.32	2.66	0.04	8.59
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	11.21	24.30	9.00	7.55	10.82
2024-25^b	12.65	23.44	9.28	8.47	11.91
2025-26^p					
High Price	13.06	23.46	9.35	7.49	12.26
Mid Price	13.04	23.45	9.28	7.42	12.22
Low Price	12.99	23.41	9.15	7.39	12.16

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 database, 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	2022-23	2023-24	2024-25	2024-25S-Ytd
Share - Any promo^a	----- % of total sales -----			
NFC	31.6%	30.6%	30.3%	35.5%
RECON	9.1%	12.7%	11.2%	11.2%
TOTAL	25.4%	25.1%	24.2%	26.7%
Share - No Promo	----- % of total sales -----			
NFC	68.4%	69.4%	69.7%	64.5%
RECON	90.9%	87.3%	88.8%	88.8%
TOTAL	74.6%	74.9%	75.8%	73.3%
Any Promo Price	----- \$ per SSE gallon -----			
NFC	\$8.92	\$9.54	\$10.56	\$10.71
RECON	\$10.21	\$10.24	\$10.58	\$11.19
TOTAL	\$9.06	\$9.73	\$10.67	\$10.91
No Promo Price	----- \$ per SSE gallon -----			
NFC	\$11.38	\$11.94	\$13.55	\$14.32
RECON	\$8.93	\$8.82	\$9.11	\$9.03
TOTAL	\$10.74	\$11.19	\$12.31	\$12.71

^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.

Table 22. Destination markets for Florida certified fresh grapefruit.								
Season	Exports		Domestic				TOTAL ^b	
(Aug-July)	Overseas ^a	Canada	South	Northeast	Central	West		
----- million 45-pound cartons -----								Million 90-lb boxes
2006-07	12.592	1.282	1.966	3.170	1.373	0.239	20.621	10.311
2007-08	12.495	1.163	1.878	2.941	1.177	0.169	19.822	9.911
2008-09	10.221	1.088	1.797	2.869	1.254	0.125	17.353	8.677
2009-10	10.162	1.151	1.886	2.919	1.180	0.123	17.420	8.710
2010-11	8.965	1.098	1.710	2.539	0.977	0.165	15.455	7.728
2011-12	7.971	0.992	1.694	2.608	1.094	0.133	14.491	7.246
2012-13	7.659	1.148	2.201	2.756	1.220	0.189	15.172	7.586
2013-14	6.074	1.105	2.019	2.552	1.067	0.123	12.939	6.470
2014-15	5.371	0.835	1.611	1.987	0.839	0.118	10.762	5.381
2015-16	5.143	0.718	1.446	1.848	0.675	0.102	9.933	4.967
2016-17	3.612	0.444	1.036	1.327	0.366	0.037	6.822	3.411
2017-18	1.508	0.221	0.625	0.748	0.127	0.011	3.241	1.620
2018-19	1.405	0.300	0.767	0.923	0.158	0.019	3.572	1.786
2019-20	1.545	0.315	0.959	1.056	0.185	0.027	4.087	2.043
2020-21	1.110	0.219	1.079	1.048	0.282	0.038	3.776	1.888
2021-22	0.699	0.155	1.116	0.912	0.388	0.040	3.310	1.655
2022-23	0.263	0.099	0.820	0.649	0.229	0.013	2.073	1.036
2023-24	0.168	0.083	1.029	0.753	0.283	0.026	2.343	1.171
2024-25p	0.030	0.054	0.936	0.547	0.155	0.020	1.743	0.872
2025-26f	0.084	0.054	n/a	n/a	n/a	n/a	1.743	0.872
2025-26p	0.026	0.039	0.835	0.492	0.116	0.051	1.559	0.780

p = preliminary.

f = Forecast (based on the USDA production forecast for 2025-26 season released on January 12, 2026). Table has been revised to report regional shipments within the United States. Domestic fresh grapefruit movement was projected in January 2026 to reach 1.605 million cartons. Regional estimates were not reported under previous framework.

Source: Division of Fruit and Vegetable Inspection Service, Florida Department of Agriculture.

a Includes offshore exports destined for Europe and South Korea.

b May not add up due to rounding.

Table 23. Utilization of Florida fresh specialty.

Season	Fresh	Non-Certified	Processed	Total
----- millions 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
2024-25 ^p	0.182	0.061	0.157	0.400
2025-26 ^f	0.182	0.061	0.157	0.400
2025-26 ^p	0.280	0.021	0.159	0.460

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.

b 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 -----								
2006-07	0.008	0.410	2.55	2.14	1.29	0.20	6.61	million 90-lb boxes
2007-08	0.001	0.334	2.82	2.47	1.20	0.16	7.07	3.30
2008-09	0.052	0.326	2.40	2.22	1.16	0.14	6.25	3.53
2009-10	0.099	0.298	2.45	1.97	0.95	0.60	6.35	3.12
2010-11	0.039	0.238	2.47	1.96	0.99	0.55	6.36	3.17
2011-12	0.052	0.214	2.42	1.82	0.89	0.55	5.95	3.18
2012-13	0.030	0.159	2.04	1.48	0.72	0.42	4.93	2.98
2013-14	0.031	0.127	1.70	1.33	0.62	0.37	4.20	2.46
2014-15	0.013	0.058	1.53	1.19	0.48	0.26	3.61	2.10
2015-16	0.016	0.042	0.99	0.81	0.32	0.17	2.37	1.80
2016-17	0.005	0.015	0.72	0.61	0.20	0.13	1.72	1.19
2017-18	0.008	0.027	0.41	0.30	0.09	0.05	0.87	0.86
2018-19	0.007	0.030	0.48	0.31	0.09	0.06	0.98	0.43
2019-20	0.015	0.020	0.58	0.31	0.11	0.11	1.14	0.49
2020-21	0.005	0.012	0.63	0.23	0.08	0.12	1.10	0.57
2021-22	0.002	0.004	0.55	0.17	0.06	0.07	0.88	0.55
2022-23	0.0017	0.004	0.42	0.13	0.04	0.06	0.65	0.44
2023-24	0.0028	0.009	0.37	0.14	0.06	0.04	0.61	0.32
2024-25p	0.002	0.002	0.214	0.079	0.027	0.041	0.365	0.31
2025-26f	0.0015	0.004	0.22	0.08	0.03	0.03	0.36	0.183
2025-26p	0.001	0.004	0.328	0.129	0.035	0.063	0.559	0.180
								0.280

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

