Benefits from FDOC Generic Promotion on the Demand for Orange Juice

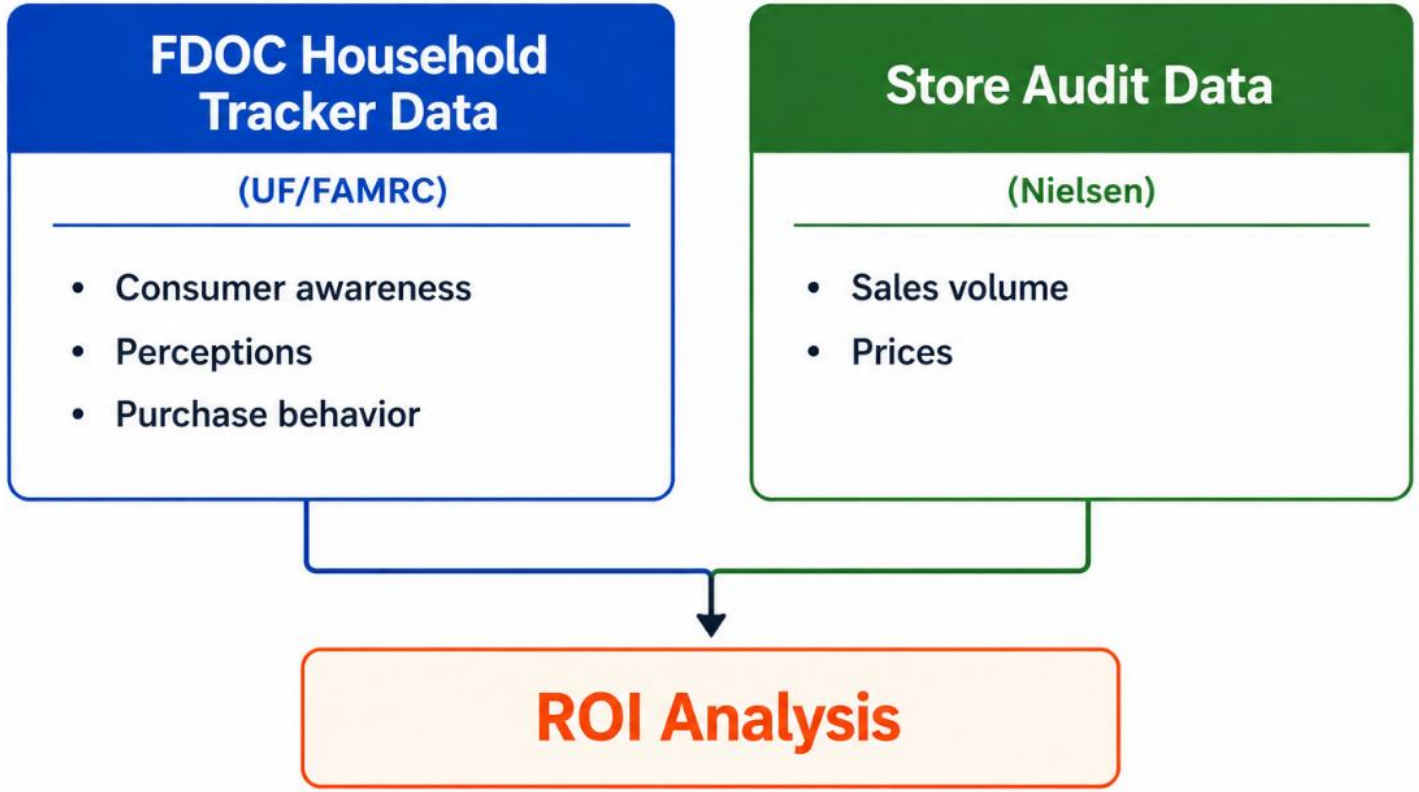
Presentation to the Florida Citrus Commission

September XX, 2026

Dr. Lisa House

Prepared with Dr. Sungeun Yoon, UF FAMRC

FDOC ROI Analysis/Data Sources



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Demand Drivers

Demographics



Perceived benefits and risks



Promotions and advertising



Seasonal effects

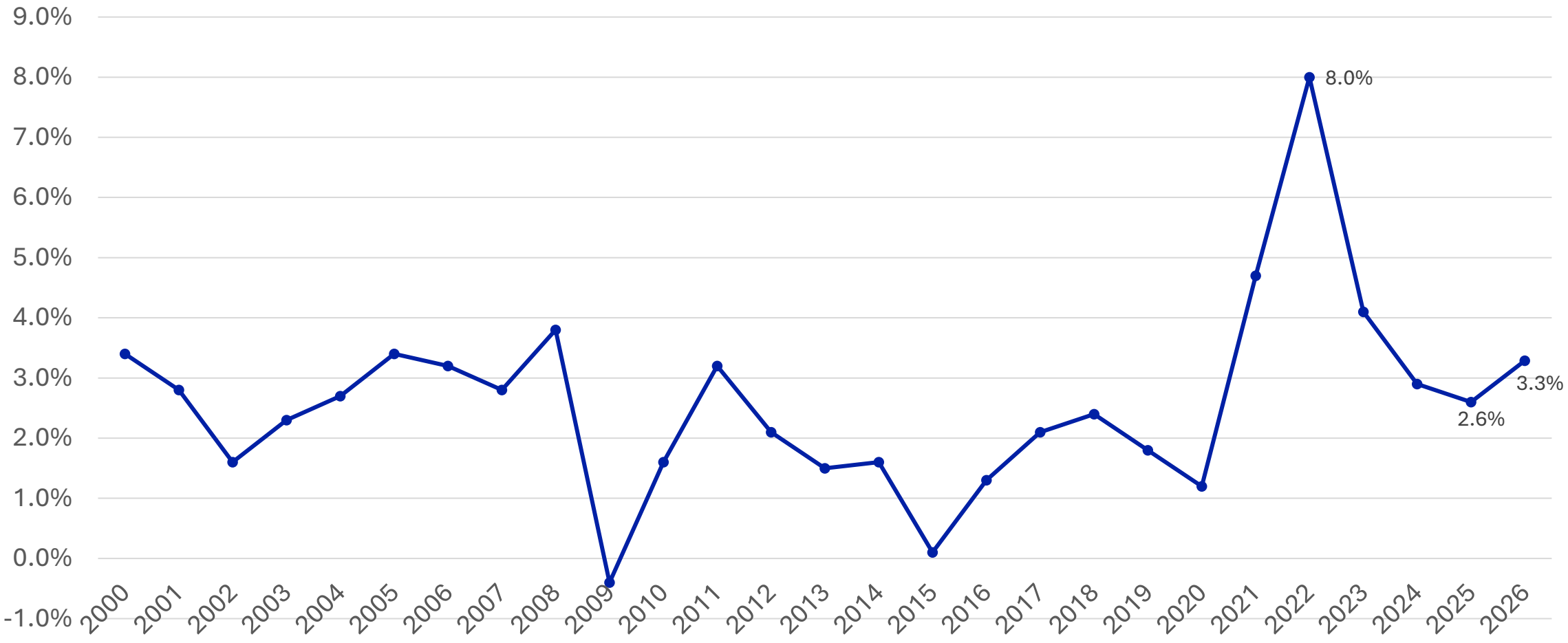


Other



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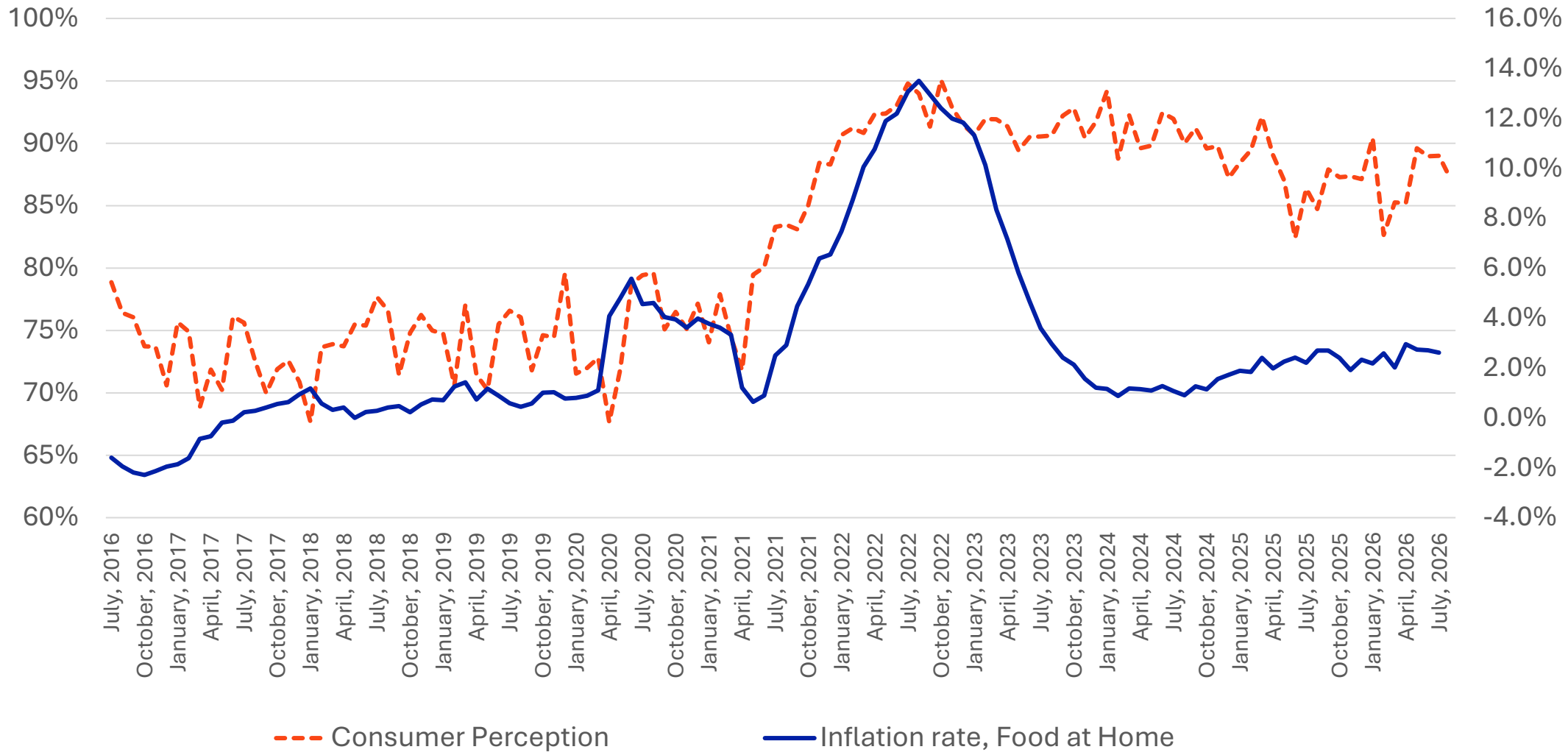
US Inflation Rate



Source: https://www.usinflationcalculator.com/inflation/current-inflation-rates/

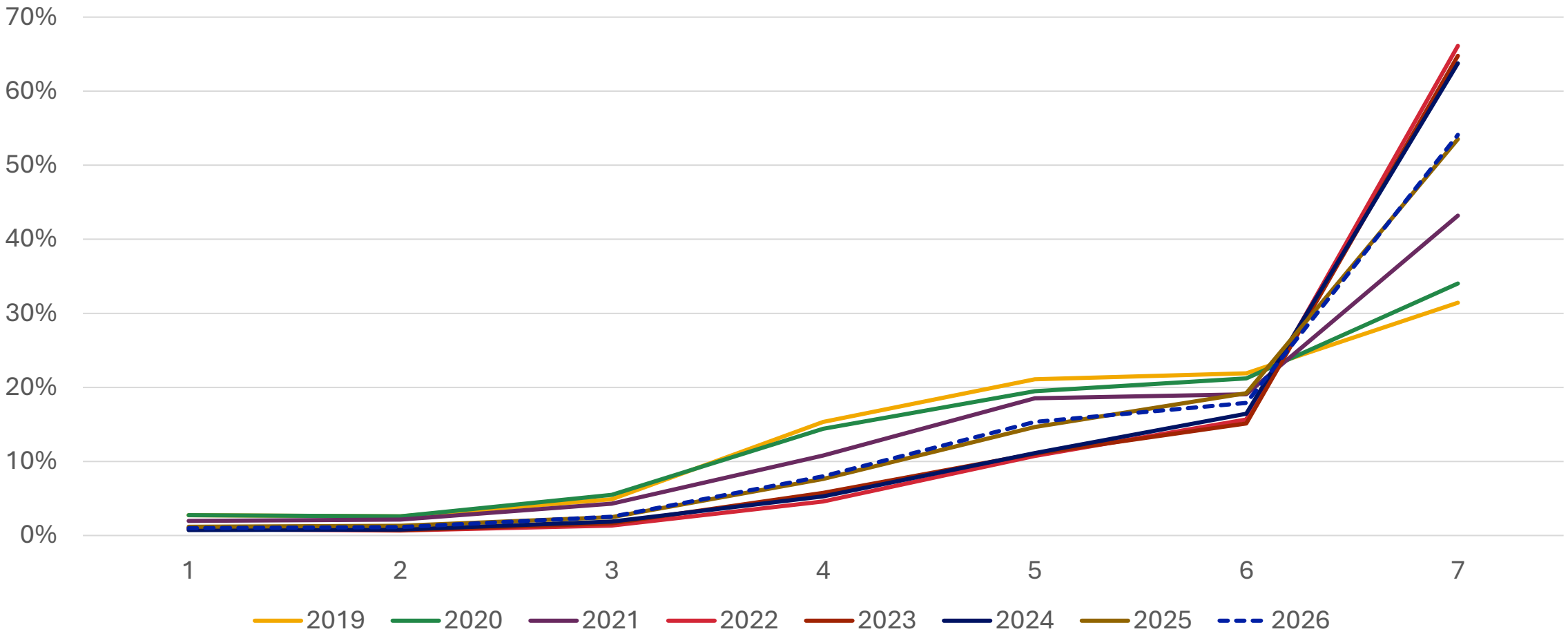
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Do consumers notice?



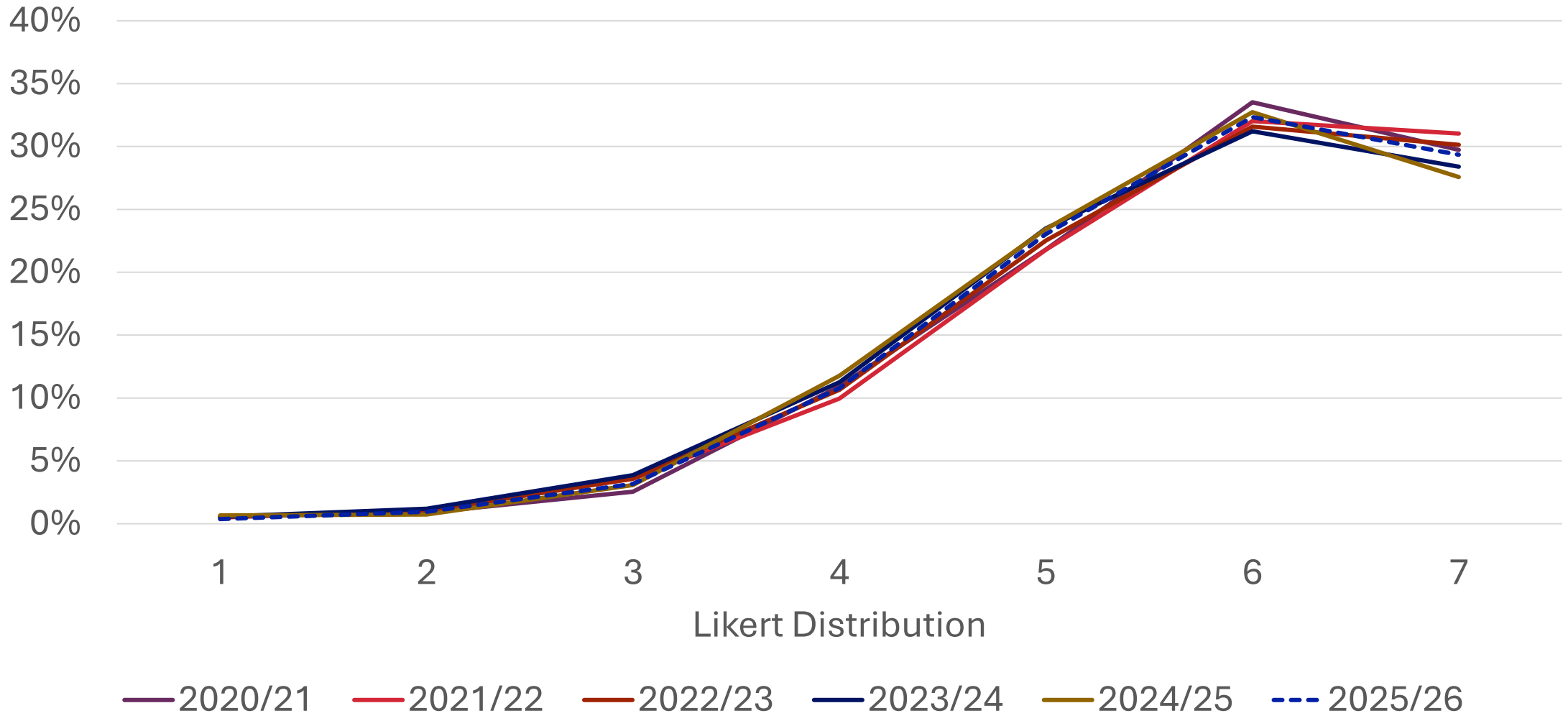
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Intensity of price awareness



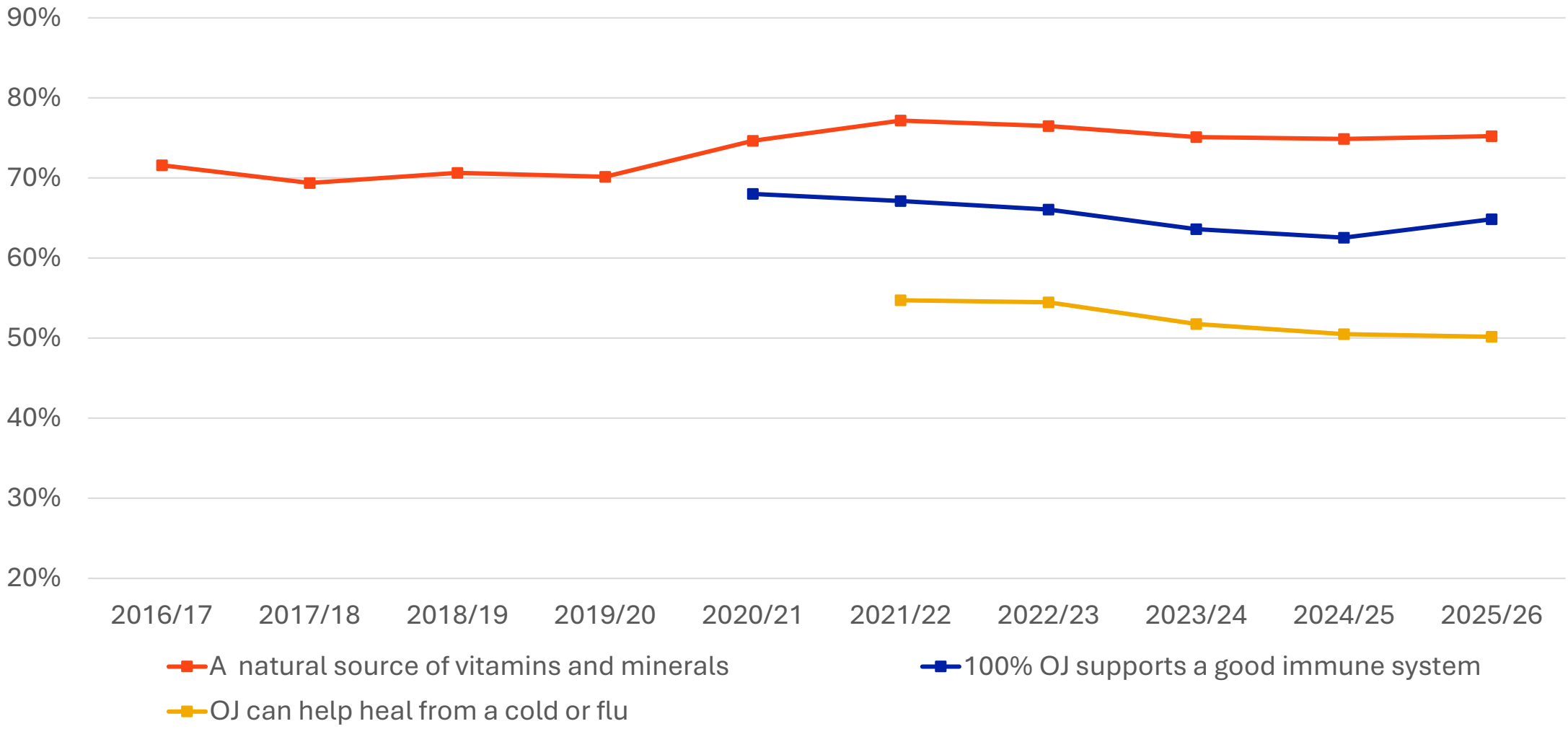
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Agreement with OJ Good Attribute Statements



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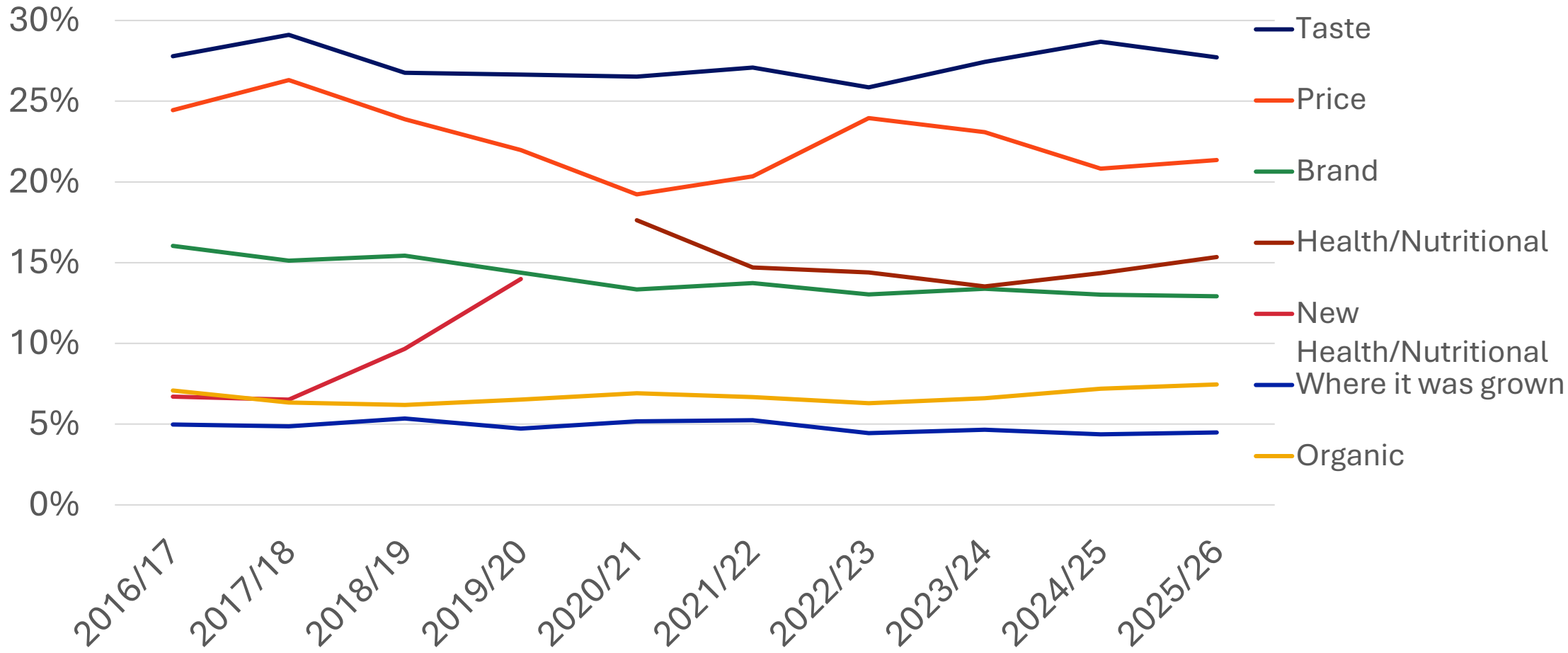
Health Perception of OJ



% of respondents who agree with each statement (Likert scale greater than 5 out of 7)

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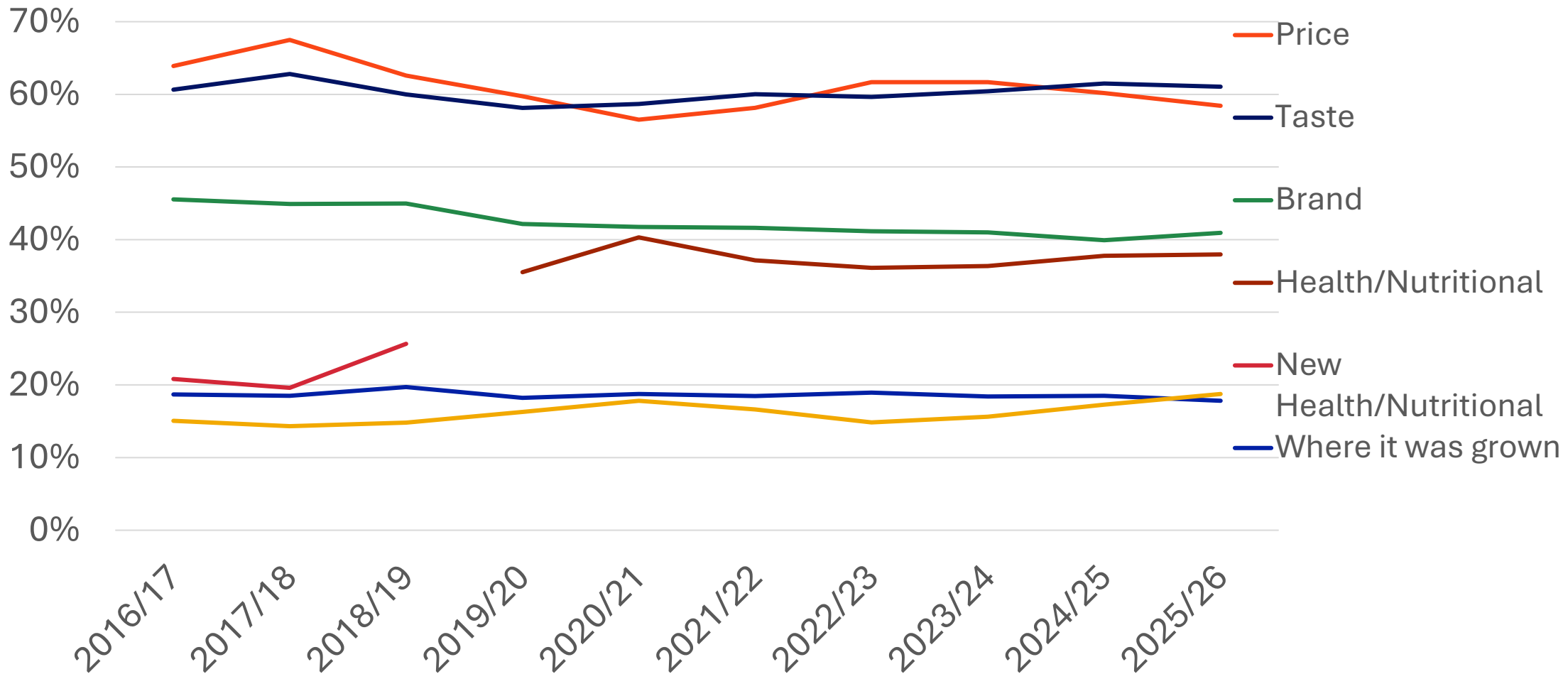
Factors considered when buying OJ (first choice)



Note: A change to the survey was made in April 2019, changing the title from 'New health and nutritional benefits' to 'Health and nutritional benefits'.

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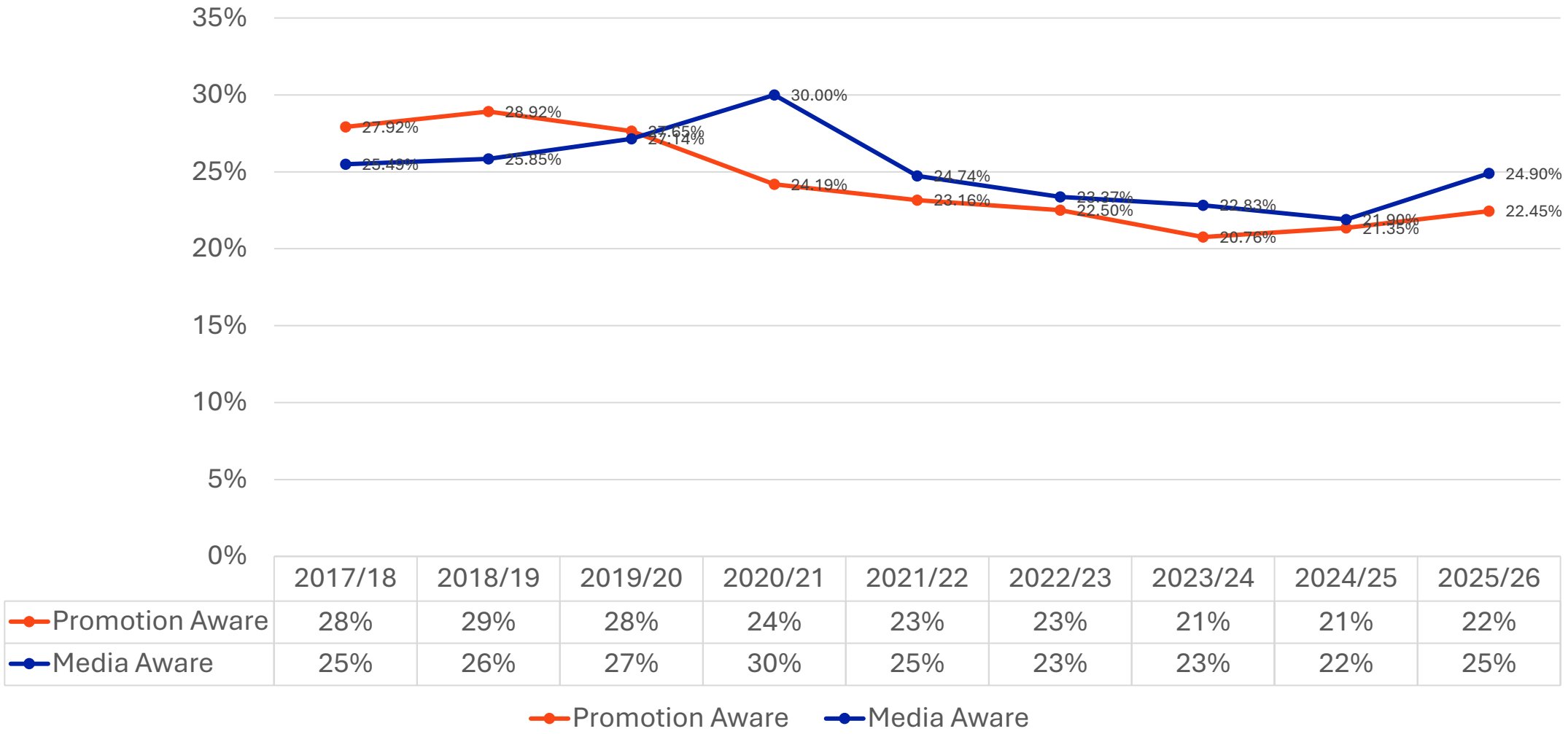
Factors considered when buying OJ (all three choices)



Note: A change to the survey was made in April 2019, changing the title from 'New health and nutritional benefits' to 'Health and nutritional benefits'.

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Awareness of Promotions and Media Mentioning about OJ

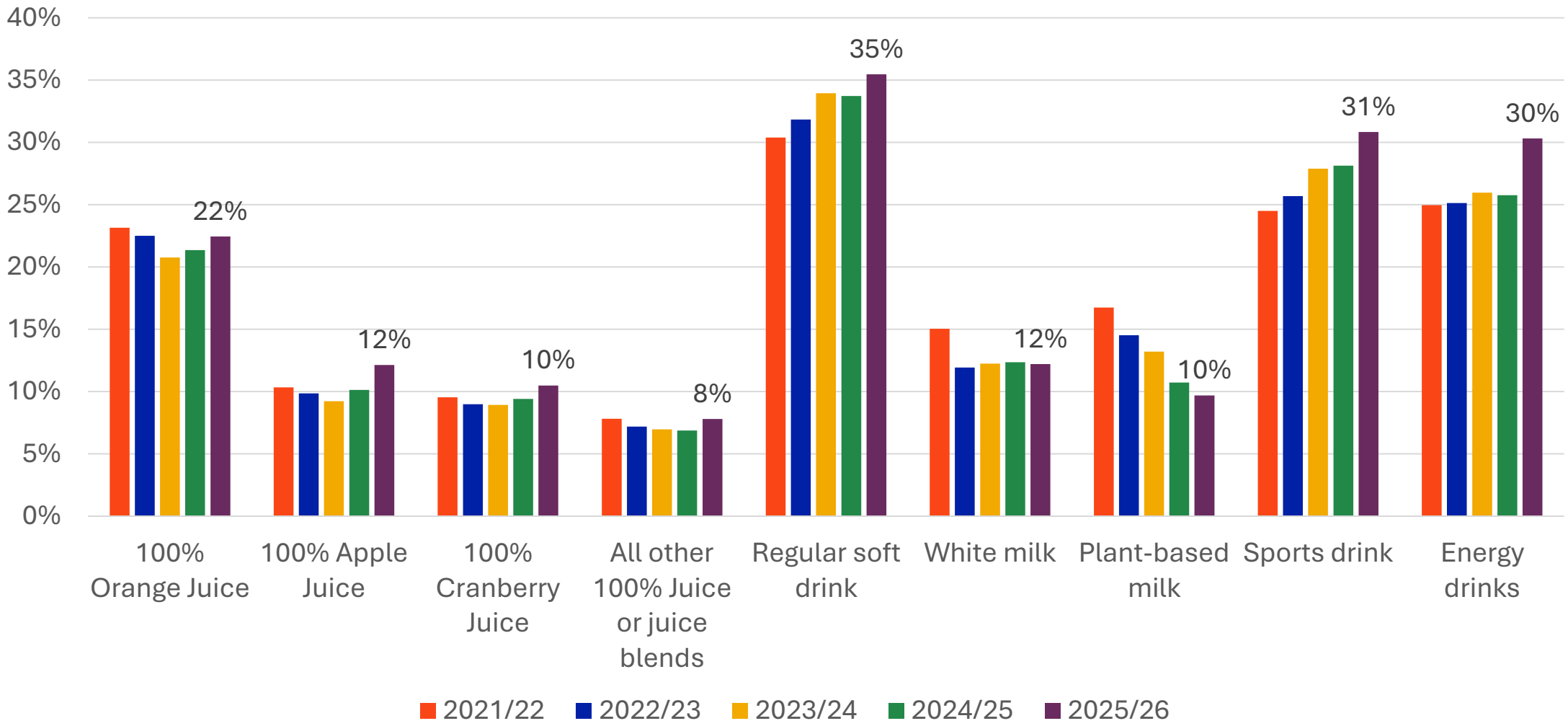


	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
Promotion Aware	28%	29%	28%	24%	23%	23%	21%	21%	22%
Media Aware	25%	26%	27%	30%	25%	23%	23%	22%	25%

Promotion: Do you recall hearing or seeing any mention of promotion or advertisement for OJ during the past 30 days?
Media: Have you seen, heard or read anything about OJ anywhere in the past 30 days?

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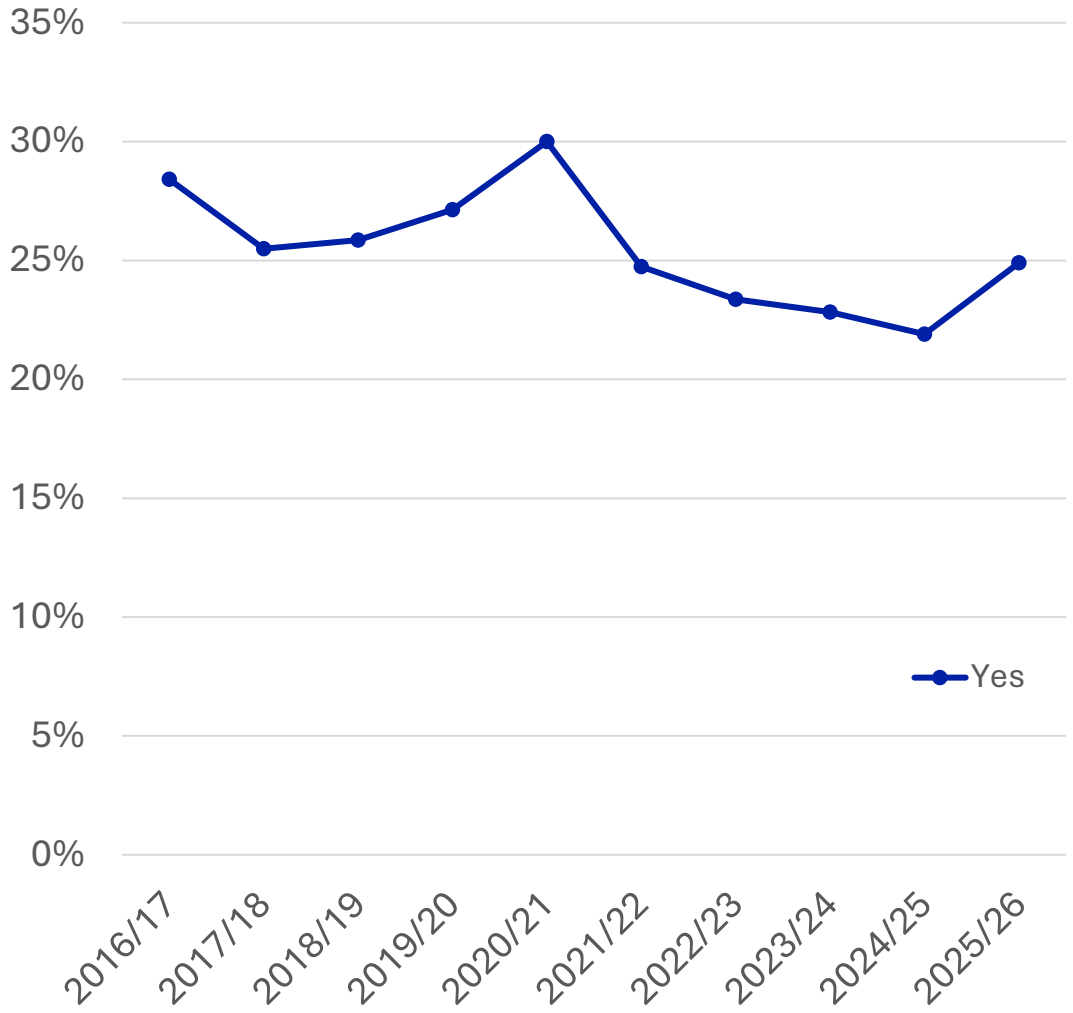
OJ Promotion Awareness Compared

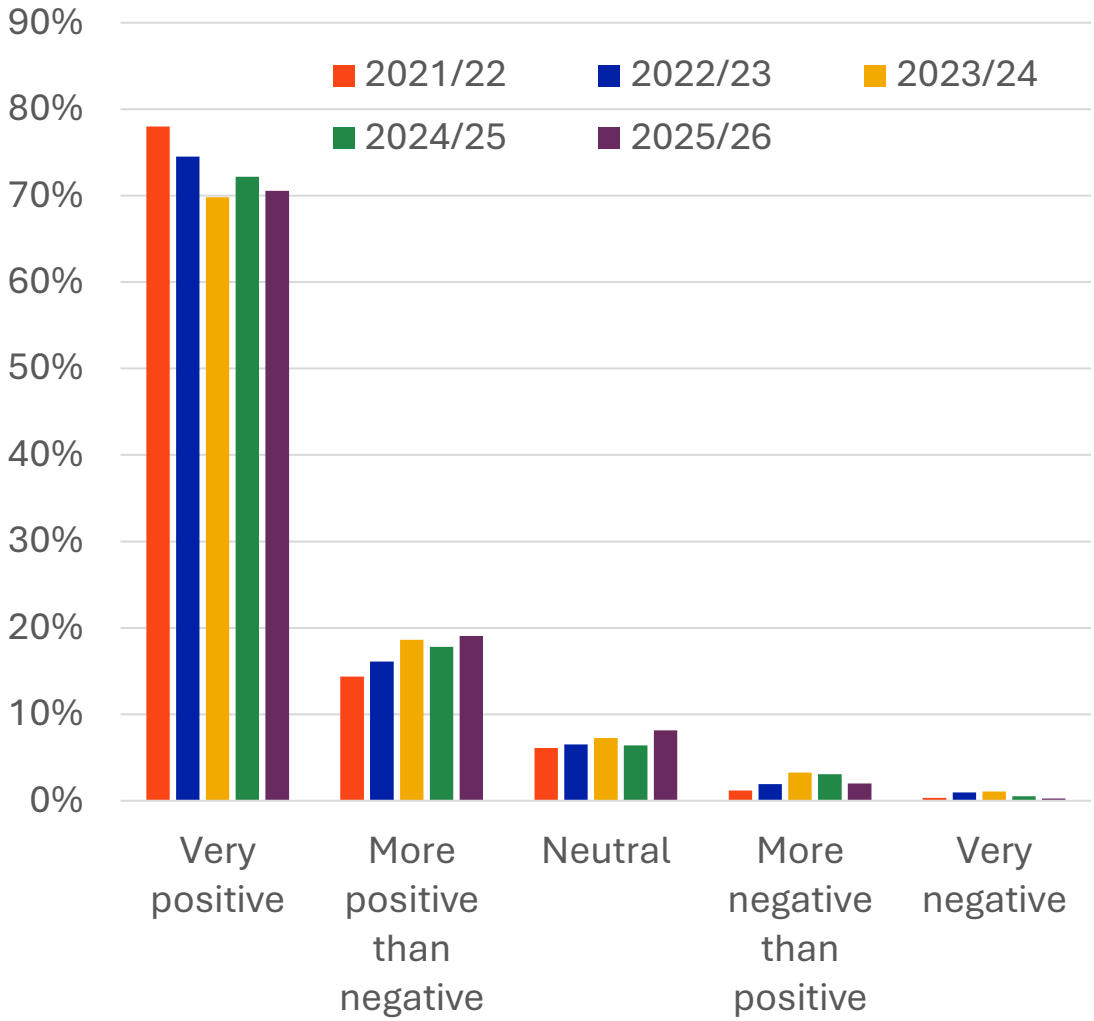


During the past 30 days, do you recall hearing or seeing any mention of promotion or advertisement for each of the types of beverages below from any sources? (Select all that apply)

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OJ Media Awareness and Temperature

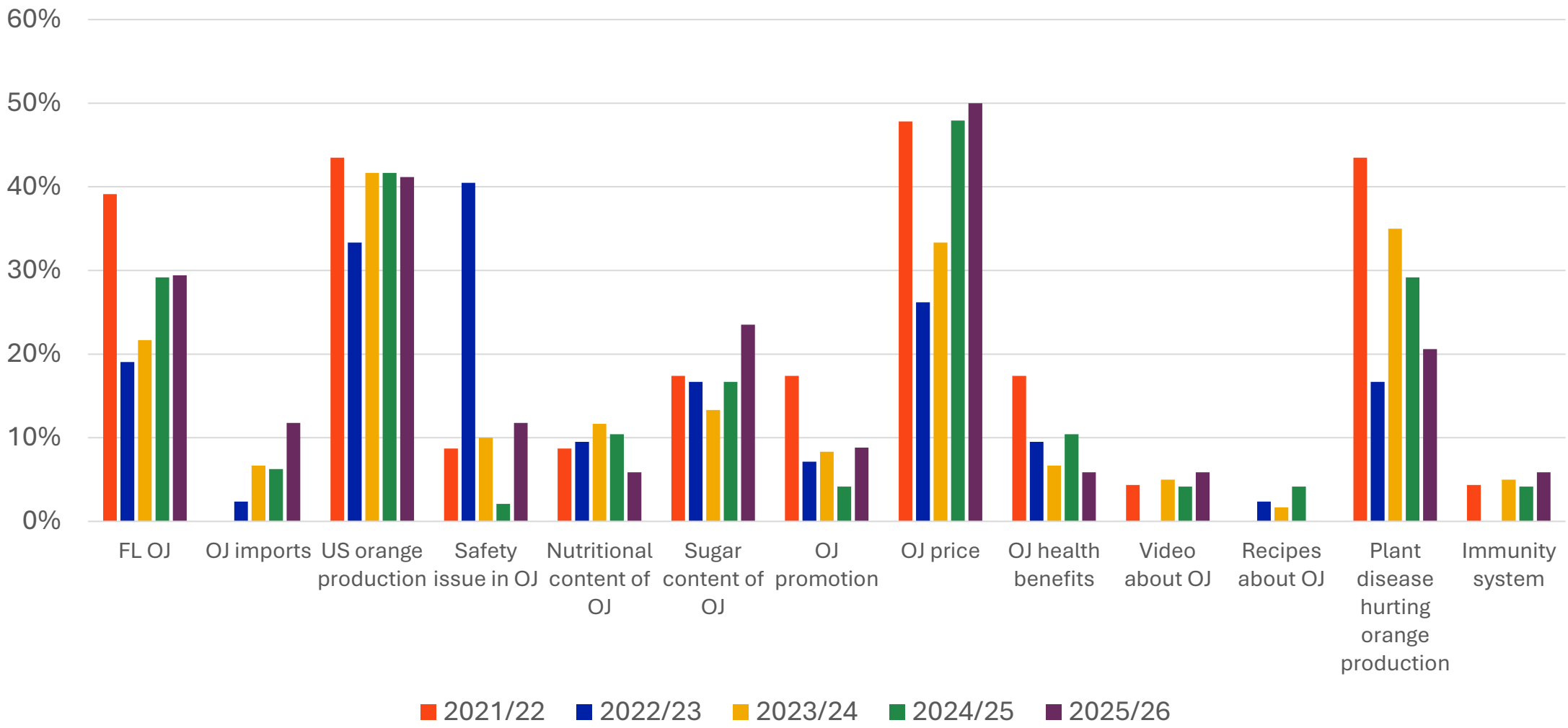




Have you seen, heard, or read anything about Orange Juice anywhere in the past 30 days?
Would you say the things you have seen, heard, or read about Orange Juice in the past 30 days have been:

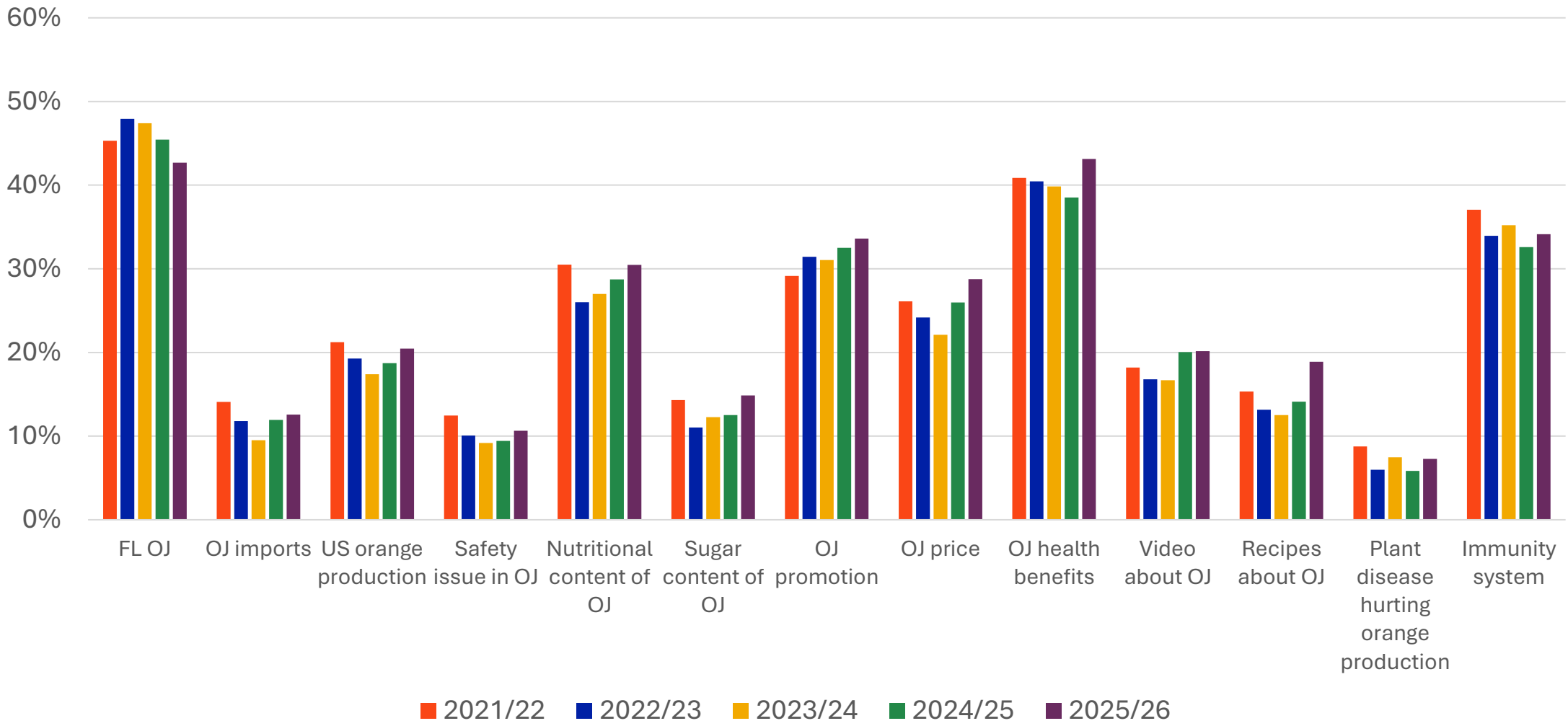
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Topics mentioned by those who reported hearing negative news about OJ



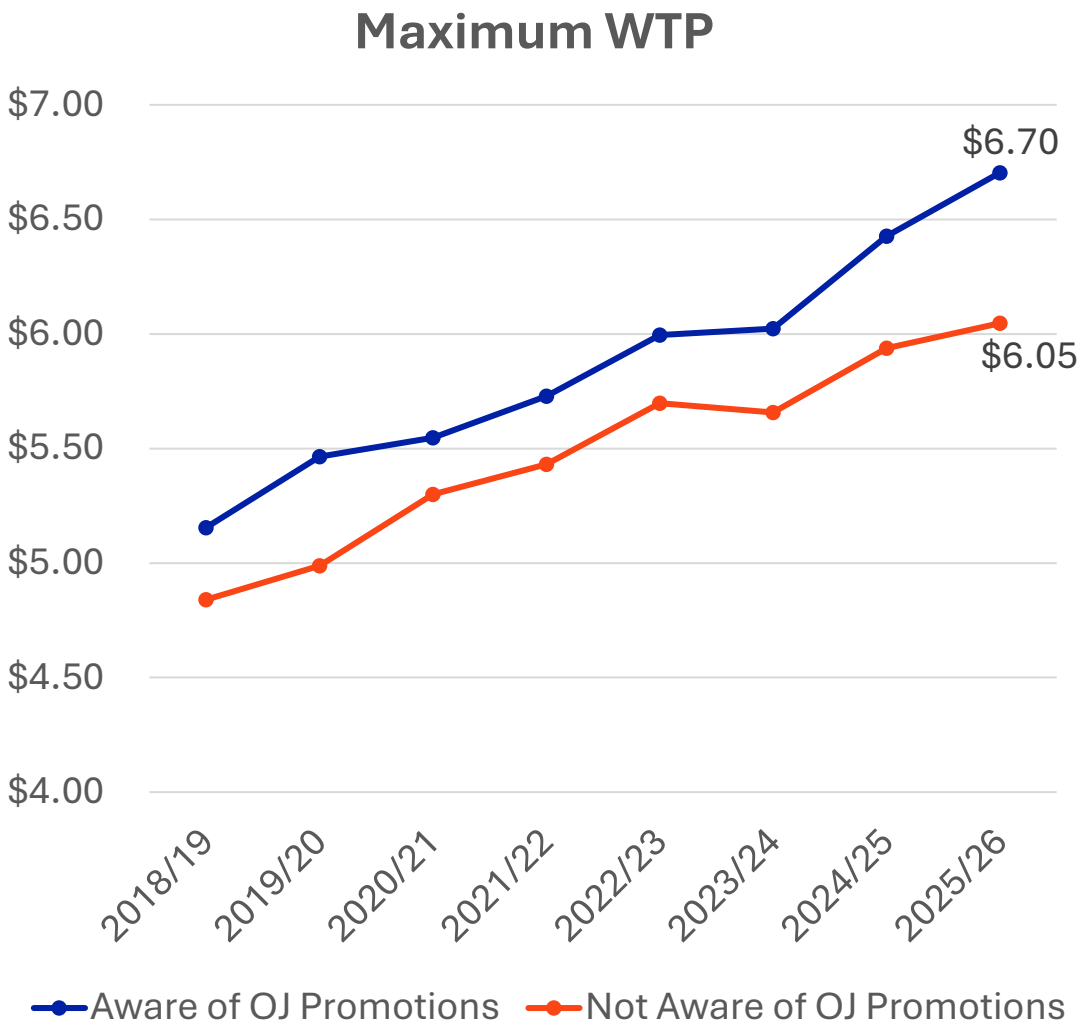
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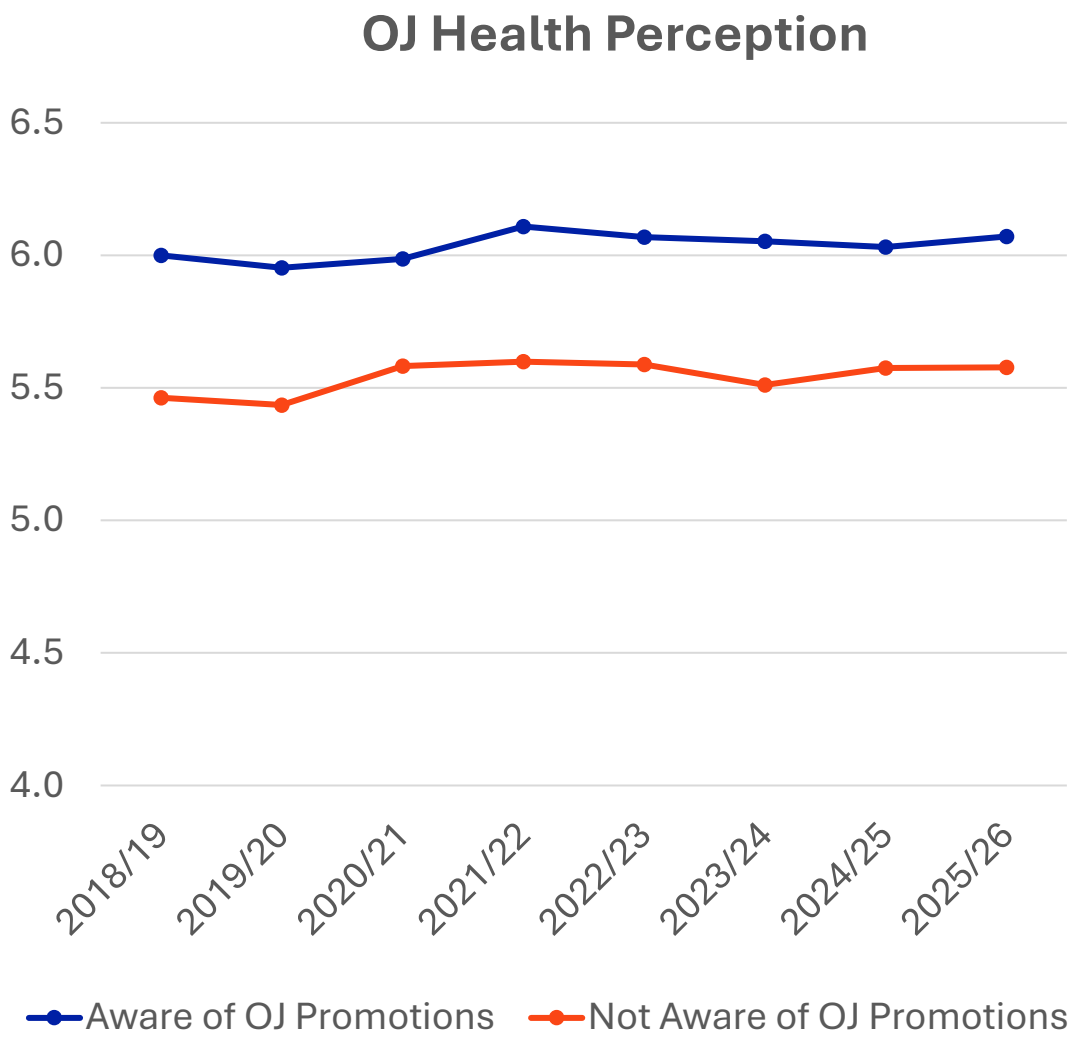
Topics mentioned by those who reported hearing positive news about OJ



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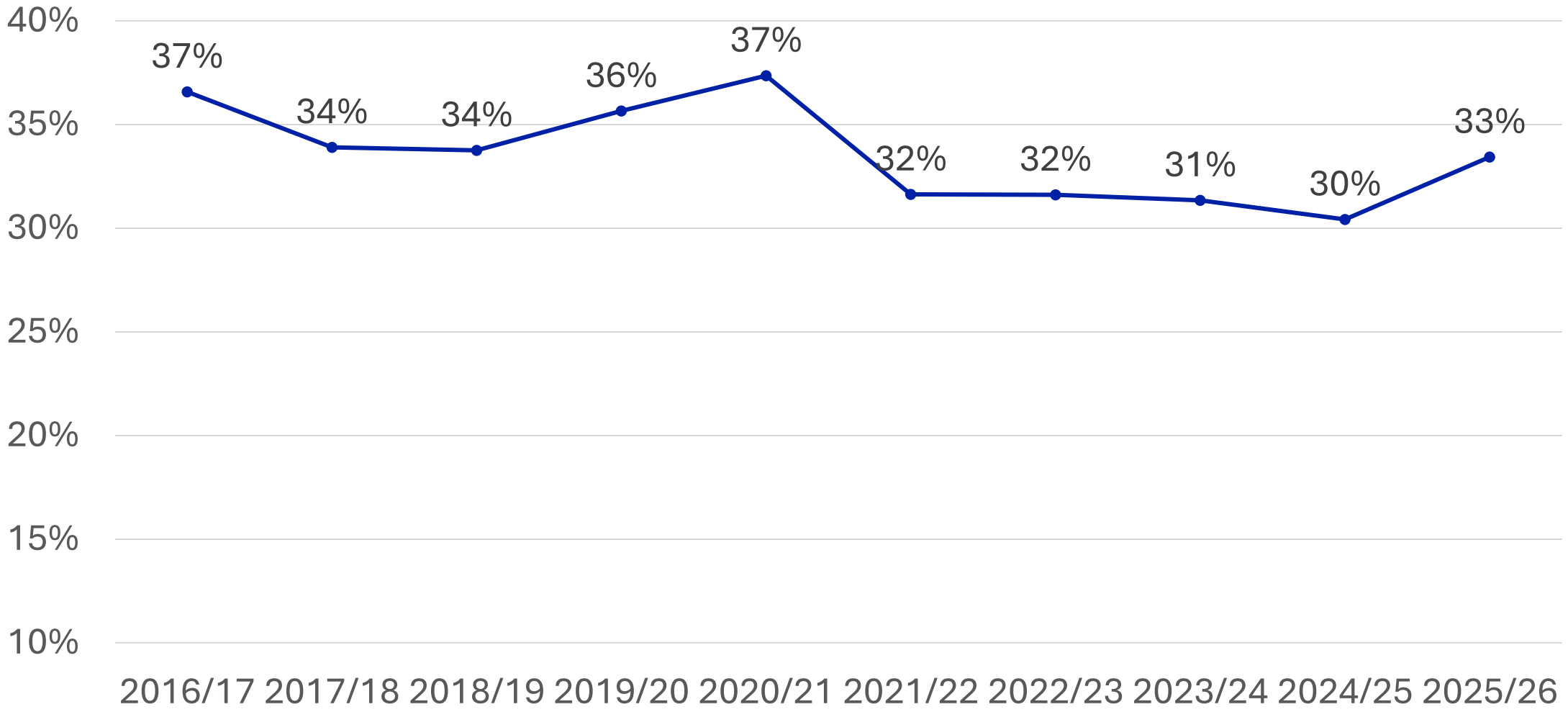
OJ Promotion Awareness and OJ Price and Health Benefits





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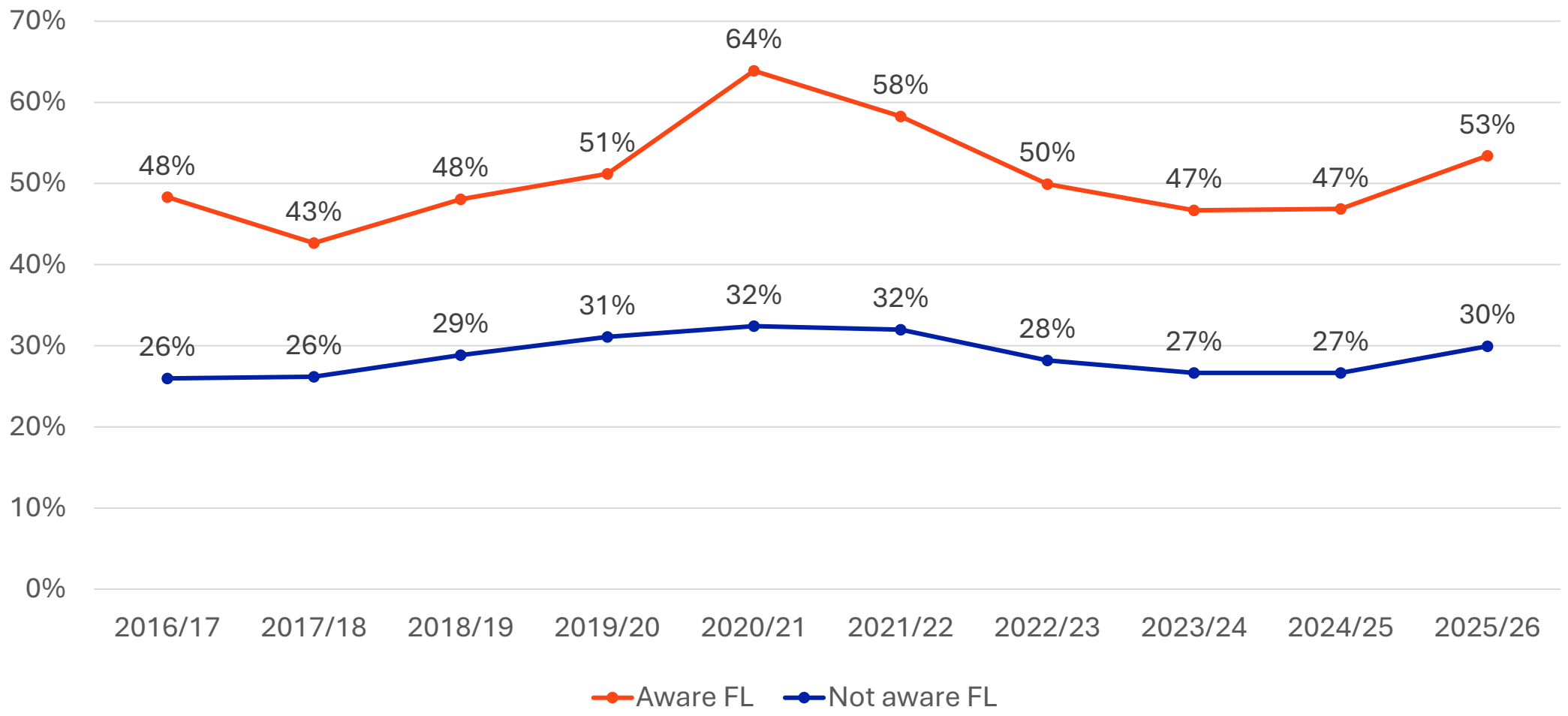
Awareness of Florida 100% OJ logo



Have you seen any logos for 100% Orange Juice that is from Florida, either in advertising, promotions, or on a container in the past 30 days?

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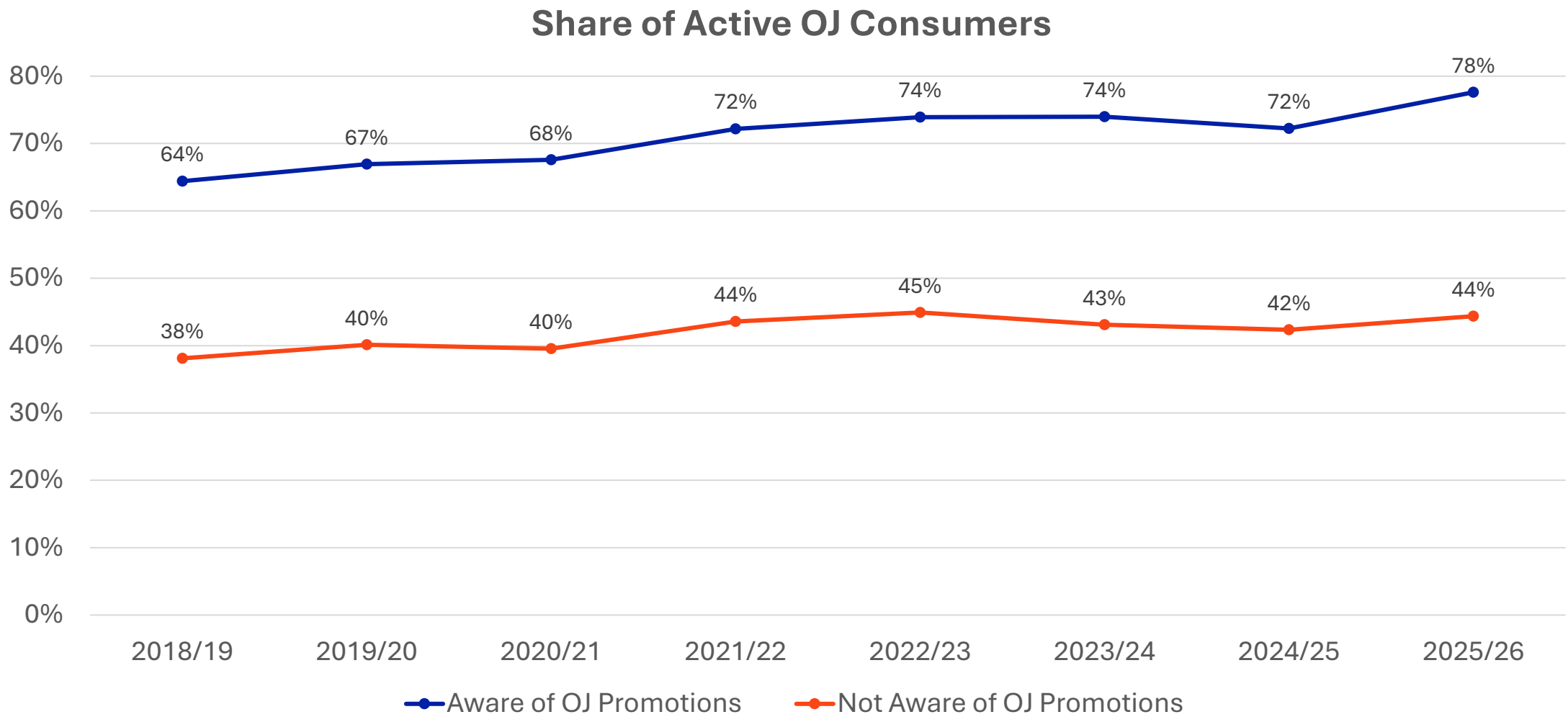
FL-logo aware consumers are more likely to purchase OJ more often



When was the last time you purchased 100% Orange Juice? – Within the last week

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Promotion-aware consumers are more likely to be active OJ consumers



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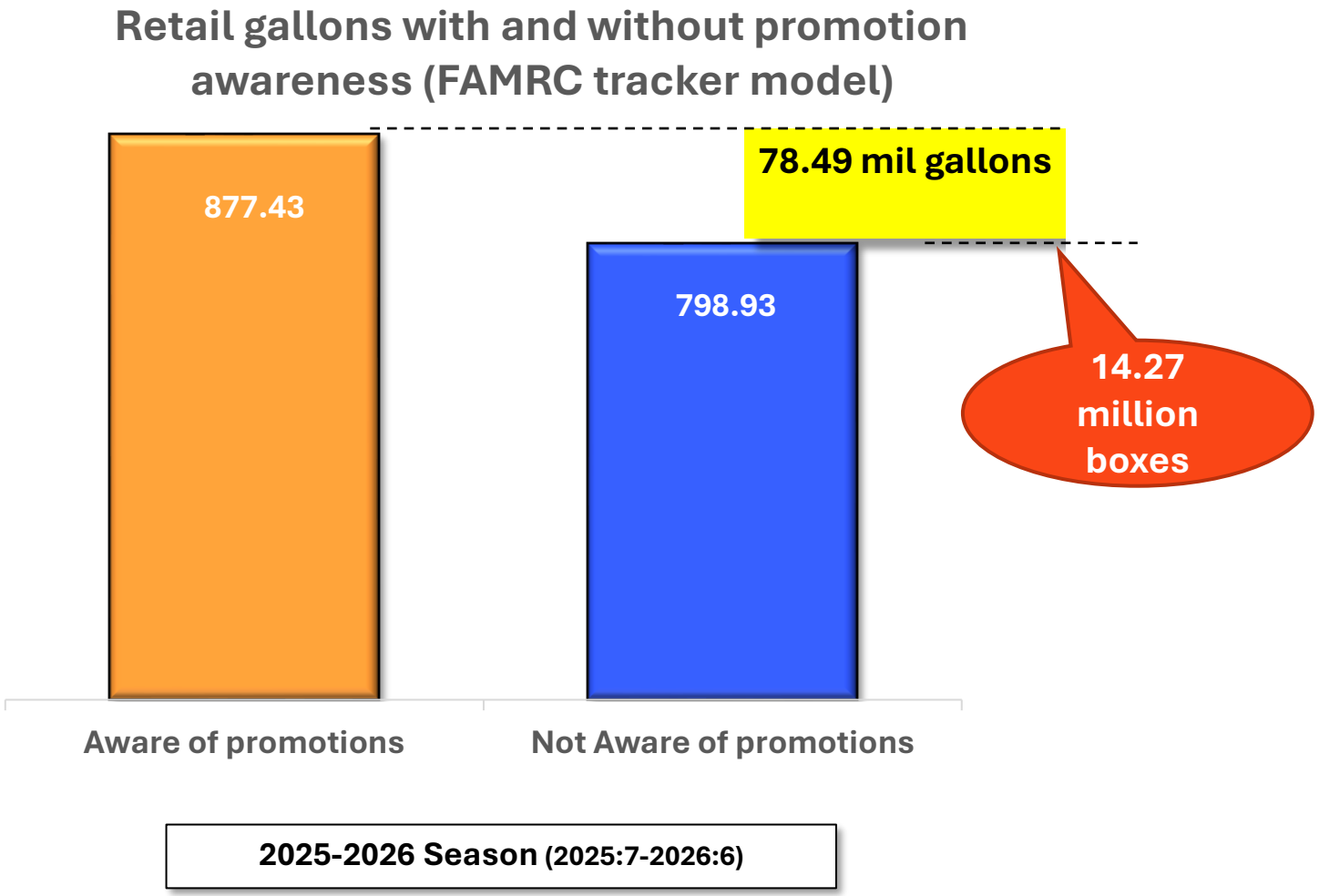
Impact of Promotion Awareness on Market Penetration

- On average, 50.1% of the households in the tracker purchased OJ in the past 30 days
- If we set awareness to 0, we predict 46.2% would purchase OJ (likewise, if we increase the awareness, we will increase the percentage purchasing)



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Impact of Promotion Awareness/Spending on Volume



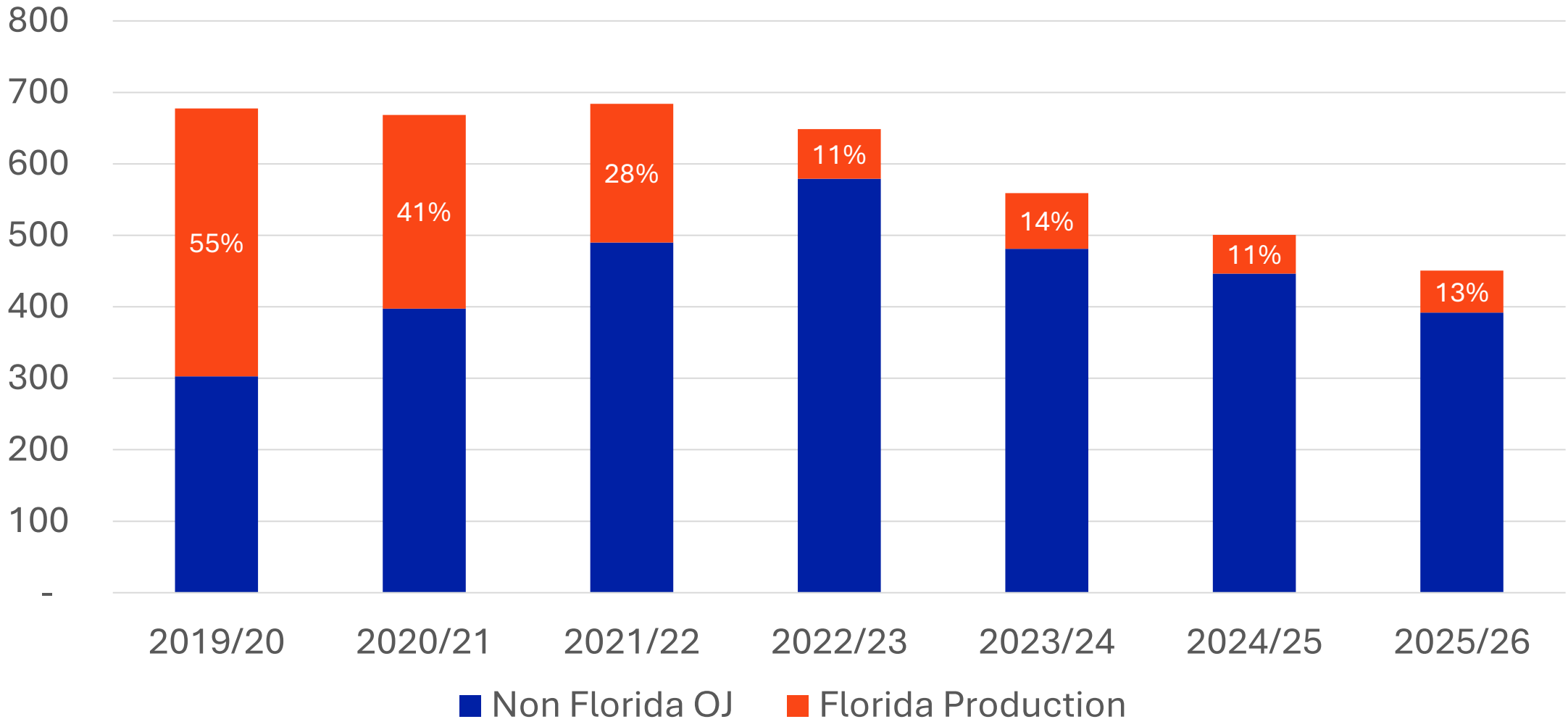
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ROI Table

	Units	Tracker data	Nielsen (85%) data
FDOC promotion expenditure	million $	$10.03 (3-year average, $10.39 in 2025-26FY)	
Estimated retail quantity sales with promotion	million SSE Gallon	877.43	297.10
Estimated retail quantity sales without promotion	million SSE Gallon	798.93	236.23
Retail quantity sales supported	million SSE Gallon	**78.49**	**60.86**
Retail Price (Nielsen)	$/Gallon	$11.66	$11.66
Gain in retail revenue	million $	$915.25	$709.66
Markup down (delivered-in/retail price)	%	29.6% (3-year average, 29% in 2025-26FY)	
Gain in delivered-in (producer) revenue	million $	$270.61	$209.82
Domestic share of total available OJ	%	13% (3-year average, 13% in 2025-26FY)	
Gain to Florida producers	million $	$34.12	$26.45
ROI (delivered-in to domestic juice)		**3.40**	**2.64**
Net ROI (delivered-in to domestic juice)		**2.40**	**1.64**

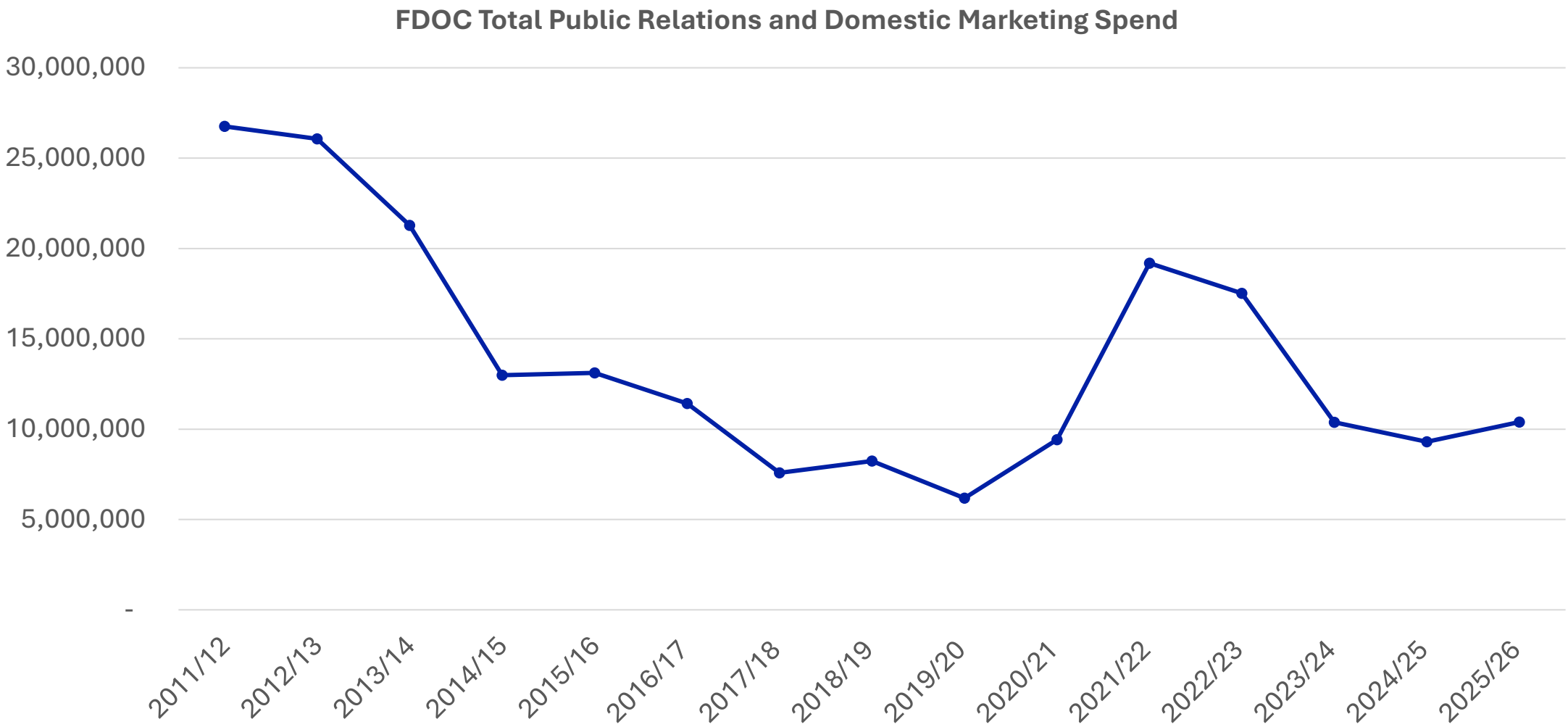
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Florida Production Share of Total Available OJ



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FDOC Orange Juice Marketing Spend



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What key variables influence ROI?

- ROI is calculated by dividing Gains to Florida producers by the most recent three years promotion expenditures
  - Changes in domestic share of OJ can cause larger changes as ROI is calculated on increase in sales attributed to awareness based on domestic share
  - Changes in promotion expenditures may cause large changes in ROI because it takes time for marketing investment to build results

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Conclusion

- OJ awareness of promotions increased this fiscal year and remained high within the beverage category, similar to other heavily promoted beverages.
- Consumers who are aware of OJ promotion or media are more likely to be active OJ consumers and have higher OJ price points and health perceptions of OJ.
- Consumers who are aware of the Florida OJ logo are more likely to purchase OJ frequently.
- Consumer inflation perceptions have moderated; however, they remain relatively elevated compared with the pre-high inflationary period.
- Benefits from promotions (ROI) to Florida producers are heavily influenced by the percentage of Florida product in the market

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