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BRIEFING MEMORANDUM FOR THE FLORIDA LEGISLATURE AND THE EXECUTIVE OFFICE OF THE GOVERNOR

SUBJECT: Measurement of Consumer Orange Juice Demand and Benefits to Florida

BACKGROUND

The Florida Department of Citrus (FDOC) requested Advertising Promotional Campaigns Special Category funding and was granted General Revenue funding to engage in domestic marketing programs focused on highlighting the nutritional benefits of Florida Orange Juice while protecting and defending the Florida Citrus industry and the communities it serves. The primary objective is to drive sales of Florida Orange Juice while increasing consumer awareness and improving the perception of the health and wellness benefits of Florida Orange Juice. Consumer awareness and influencer outreach programs are critical to maintaining the positive perception of Florida Orange Juice and fresh Florida Citrus as a premium product that consumers have a willingness to pay for under current citrus growing conditions.

FDOC, in partnership with University of Florida (UF)/Florida Agricultural Marketing Research Center (FAMRC), estimated a return on investment (ROI) and evaluated the benefits to the State of Florida from investing $10.4 million in both grower resources and General Revenue in the 2025-26 season towards sustaining consumer awareness of Florida-sourced orange juice in an effort to maintain consumer demand at the established baseline level. The significant decline in citrus crop production over the past several years, primarily associated with the impacts of HLB and multiple adverse weather events between 2017 and 2024, has directly threatened the funding of the program whose mission is to ensure the sustainability and economic well-being of the Florida Citrus grower, the citrus industry, the State of Florida, and Florida's local communities served by the industry. The Department's regular statutory funding source is entirely tied to citrus production. Thus, as production decreased considerably over the last decade and production costs increased, funds available in the Citrus Advertising Trust Fund have also decreased contributing to a decline in consumer awareness in prior years.[1]

BRIEFING NOTES

- At 22.5%, more than 1 in 5 respondents demonstrated awareness of orange juice promotions during the 2025-26 fiscal year, higher than last year's level.

[1] Methodology citation: Heng Y, Ward RW, House LA, Zansler M. Assessing key factors influencing orange juice demand in the current US market. *Agribusiness*. 2019; 35:501–515.https://doi.org/10.1002/agr.21596

- Consumers who were aware of OJ promotions exhibited a 10.7% increase in their willingness to pay for OJ, coupled with an 8.9% heightened perception of the health/wellness benefits associated with OJ.
- The study shows consumers' perception of the health/wellness benefits of OJ was strong in 2025-26 with 38% of consumers citing health and wellness as a major factor influencing their purchase of 100% OJ.
- Results of the 2026 ROI analysis indicate that FDOC programs in the last year will have a benefit-cost ratio between 2.64 and 3.40, signifying that each dollar spent on generic promotions of processed orange marketing returned between $2.64 and $3.40 to the Florida grower in added revenue at the grower delivered-in price level. The returns increased by $0.995 and $1.17 for each respective model compared to last fiscal year.
- The 2026 UF-FAMRC study showed that demand for orange juice would have declined by 8.9% without the awareness of FDOC promotional activities. The Awareness model estimates consumption would have declined by an additional 78.49 million single-strength equivalent gallons, equivalent to roughly 14.27 million boxes of Florida processed oranges, without FDOC promotions. The volume supported by awareness was reinforced by a secondary model using retail sales data.
- The domestic share of Florida Orange Juice was estimated at 13% for the 2025-26 season, a increase compared to previous seasons with improved production compared to the previous season. A 3-season average of 13% accounts for the domestic share of existing inventories from previous seasons.
- The estimated economic impacts represent a conservative baseline, as the models do not account for institutional/food service orange juice consumption and exports.

SUMMARY

Reinforcing the positive attributes of orange juice, such as consumers' awareness of the health and wellness benefits of 100% orange juice, is an ongoing effort and a top priority for the FDOC. In a time when misinformation, distortion, and false narratives proliferate in news media and blogs, scientific studies resoundingly attest to the undeniable nutritional benefits of 100% orange juice. These substantiated attributes are further reinforced by FDOC's marketing strategies, which encompass an Always On Activation campaign crafted to enhance the sales of Florida Orange Juice. Investment in promotions and public relations/issues management not only benefits the Florida Citrus industry but also provides economic benefits to the State of Florida. Promotional activities have a lag effect in building consumer awareness. Over time, the health and wellness attributes of orange juice may have sustained the category during periods of high inflation. A strong majority of consumers continue to associate OJ with positive health attributes (e.g., vitamin C, immune support). Results indicate that funding serves the primary purpose of the program, which is to sustain the economic benefits to the state by keeping Florida Citrus top of mind, improving awareness of nutritional benefits, and boosting demand for Florida oranges. In turn, demand for fresh and processed citrus is a key driver in promoting incentives for growers to replant in the long run.

As the Florida citrus industry seeks to reverse the course of a downward production trend and invests in the strategic marketing of Florida citrus, the overarching goal of this funding request remains to safeguard the enduring vitality of the orange juice category, ensuring its long-term sustainability as a cornerstone of Florida's economic landscape.