Economic & Market Research Committee Report



Agenda

- Florida Citrus Industry: 2025/26 Retrospective
- Orange Juice and Grapefruit Juice Retail Sales Trends Final Season Update
- Benefits from FDOC General Promotion on the Demand for Orange Juice



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- Florida Citrus Industry: 2025/26 Retrospective
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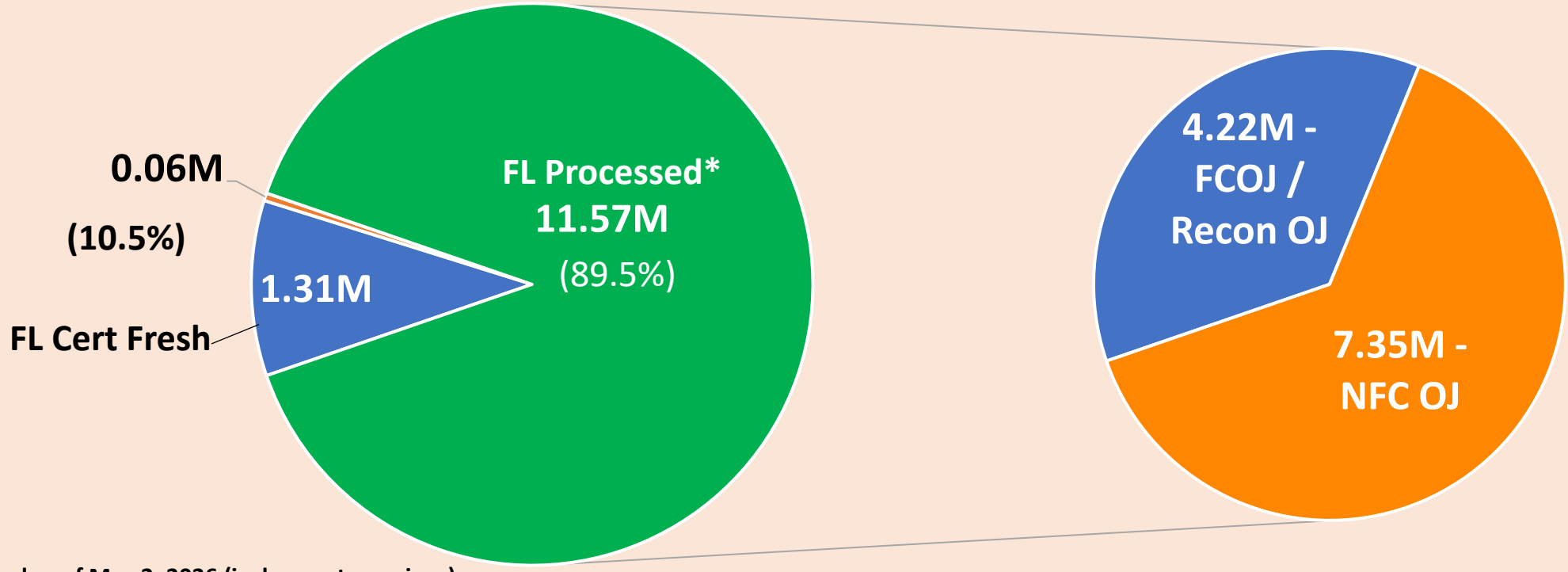


Utilization of Florida Crop – 2025-26p

Variety	Certified Fresh [a]	Non-Cert Fresh	Processed			Total 25-26 Estimates [c]
			Frozen Concentrate [b]	Single-Strength [b]	Other	
	---------- Millions 90-lb boxes ----------					
Oranges	1.306	0.057	4.220	7.354	0.013	12.950
Grapefruit	0.7796	0.0314	--	0.5187	0.023	1.350
Specialty	0.2796	0.214	0.159		0.000	0.460
Total	2.3652	0.3024	4.379	7.8727	0.036	**14.76**

[a] Source: FDOC Database – FDACS Certified; [b] Source: FDOC Florida Processor Database; [c] Non-cert and Other are residuals derived from USDA Estimates

Florida Orange Utilization – 12.95M

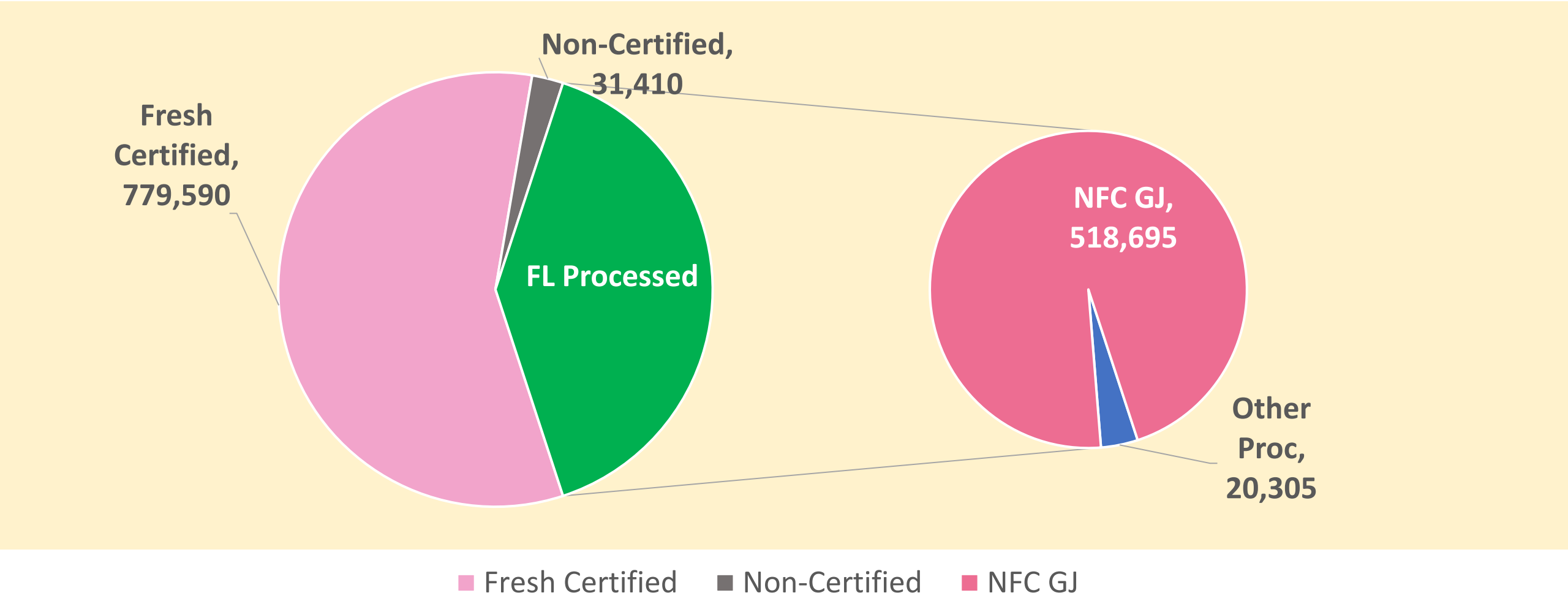


*Estimated as of May 2, 2026 (incl some tangerines)

Fresh Certified non-cert FCOJ NFC OJ

Share of total OJ as retail consumption is estimated to range from 66-68%.

Florida Grapefruit Utilization – 1.35M



*Other Proc = USDA September 2026 processed estimate less FDOC Processor database

Florida Processor OJ/GJ Availability

- Beginning Inventory - ↑17%
  - FCOJ – 124.3M ps (↑68%) & NFC OJ – 76.1M ps (↓21%)
- Pack from Fruit: production, juice yields
- Imports
- Movement (domestic, exports) ← Consumption
- Ending Inventory
- External Trends* (weather-related events, etc.)

Florida SSOJ Supply & Domestic Use

Proxy for consumption in millions equivalent gallons).

Season	Beginning inventory	Total Production	FL Processor		NFC Availability*	Ending Inventory	Movement: Presumed Consumption
			Imports	Exports			
	Millions 11.8° Brix gallons						
2022-23	90.76	61.45	248.60	0.85	399.96	115.70	324.19
2023-24	115.70	59.49	198.89	0.52	373.56	93.80	299.44
2024-25	93.80	34.97	198.22	0.27	326.72	73.97	268.34
2025-26p	73.97	35.98	201.89	0.27	311.57	103.37	258.68

*NFC Availability as presented excludes Recon used in SSOJ and reported net/loss gains

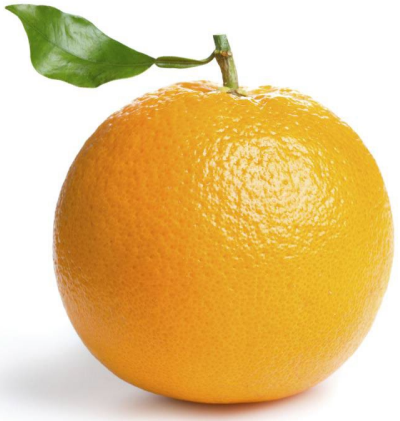
Florida FCOJ Supply & Domestic Use

Proxy for consumption in millions equivalent gallons).

Season	Beginning inventory	Total Production	FL Processor		FCOJ Availability	Ending Inventory	Movement: Presumed Consumption
			Imports	Exports			
	Millions 11.8° Brix gallons						
2022-23	122.19	5.96	178.94	2.73	316.93	68.40	248.53
2023-24	68.40	16.25	211.64	7.05	314.85	71.86	243.42
2024-25	71.86	17.83	225.58	0.49	339.15	120.88	218.26
2025-26p	120.88	21.14	159.22	0.34	359.17	178.53	180.64

*FCOJ Availability represents OJ for recon, shelf stable, and frozen OJ.

Florida Certified Fresh Citrus Shipments



Florida Certified Fresh Oranges

Fresh shipments by destination (millions of cartons and 90-lb boxes).

Season	Exports (1%)		Domestic (99%)				Total	
	Overseas	Canada	South	Northeast	Central	West		90-lb
	Millions 4/5 Bushel Cartons							Boxes
2021-22	0.017	0.143	1.869	1.405	1.191	0.054	4.679	2.340
2022-23	0.012	0.089	1.138	0.915	0.795	0.033	2.983	1.492
2023-24	0.015	0.129	1.480	0.927	0.696	0.128	3.375	1.688
2024-25	0.010	0.023	0.878	0.606	0.461	0.016	1.995	0.998
2025-26p	0.014	0.011	1.154	0.719	0.566	0.147	2.611	1.305

Florida Certified Fresh Grapefruit

Fresh shipments by destination (millions of cartons and 85-lb boxes).

Season	Exports (4.2%)		Domestic (95.8%)				Total	
	Overseas	Canada	South	Northeast	Central	West		85-lb
	Millions 4/5 Bushel Cartons							Boxes
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
2024-25	0.030	0.054	0.936	0.547	0.155	0.020	1.743	0.872
2025-26p	0.026	0.039	0.835	0.492	0.116	0.051	1.559	0.780

Florida Certified Fresh Specialty

Fresh shipments by destination (millions of cartons and 95-lb boxes).

Season	Exports (0.9%)		Domestic (99.1%)				Total	
	Overseas	Canada	South	Northeast	Central	West		95-lb
	Millions 4/5 Bushel Cartons							Boxes
2021-22	0.005	0.011	0.521	0.145	0.061	0.066	0.808	0.404
2022-23	0.002	0.004	0.415	0.131	0.040	0.055	0.647	0.324
2023-24	0.003	0.009	0.367	0.135	0.058	0.039	0.611	0.305
2024-25	0.002	0.002	0.214	0.079	0.027	0.041	0.365	0.183
2025-26p	0.001	0.004	0.328	0.129	0.035	0.063	0.559	0.280

Processors' Statistics Report Prices

	2023-24 8/10/2024	2024-25 8/9/2025	2025-26 8/8/2026	% Change 2025-26 over 2023-24	% Change 2025-26 over 2024-25
		Processor Week 45 of 53			
		$ / Pound Solid		%	
Early and Midseason Oranges					
Final Full Price Known	$2.51	$3.78	$3.37	*34.0%*	*-10.9%*
Final Intermediate Price Only (Floor)	$2.45	$3.29	$3.38	*38.0%*	*2.7%*
Final Full and Intermediate Combined	$2.45	$3.51	$3.37	*37.6%*	*-4.0%*
Late Season Oranges					
STD Full Price Known	$3.17	$3.95	$3.44	*8.5%*	*-12.9%*
STD Intermediate Price Only (Floor)	$2.66	$3.41	$3.51	*32.0%*	*3.1%*
STD Full and Intermediate Combined	$2.69	$3.60	$3.47	*28.9%*	*-3.6%*
Complete Season					
STD Full Price Known	$3.00	$3.87	$3.41	*13.8%*	*-11.9%*
STD Intermediate Price Only (Floor)	$2.58	$3.37	$3.47	*34.5%*	*3.1%*
STD Full and Intermediate Combined	$2.60	$3.57	$3.44	*32.1%*	*-3.7%*
		Millions of 8/5-Bushel Boxes		%	
Early and Midseason Oranges	**6.1**	**4.0**	**3.9**	***-36.2%***	***-3.5%***
Final Full Price Known	0.2	1.2	1.6	*761.4%*	*31.6%*
Final Intermediate Price Only (Floor)	4.6	1.5	1.2	*-74.0%*	*-18.5%*
Final Unpriced	1.3	1.3	1.1	*-17.1%*	*-19.3%*
Late Season Oranges	**9.9**	**7.0**	**7.7**	***-22.6%***	***10.1%***
STD Full Price Known	0.5	1.4	2.5	*432.7%*	*80.7%*
STD Intermediate Price Only (Floor)	6.6	2.4	2.3	*-66.0%*	*-7.1%*
STD Unpriced	2.8	3.2	2.9	*3.2%*	*-7.6%*
Complete Season	**16.0**	**11.0**	**11.6**	***-27.8%***	***5.1%***
STD Full Price Known	0.7	2.6	4.1	*526.6%*	*57.6%*
STD Intermediate Price Only (Floor)	11.2	3.9	3.5	*-69.3%*	*-11.4%*
STD Unpriced	4.1	4.5	4.0	*-3.2%*	*-11.1%*
		% of Total		%	
Early and Midseason Oranges					
Final Full Price Known	3.1%	30.3%	41.4%	*1250.8%*	*36.5%*
Final Intermediate Price Only (Floor)	75.5%	36.4%	30.8%	*-59.2%*	*-15.5%*
Final Unpriced	21.4%	33.2%	27.8%	*30.0%*	*-16.3%*
Late Season Oranges					
STD Full Price Known	4.7%	19.9%	32.6%	*588.2%*	*64.1%*
STD Intermediate Price Only (Floor)	66.7%	34.8%	29.4%	*-56.0%*	*-15.6%*
STD Unpriced	28.5%	45.4%	38.1%	*-16.1%*	*-16.1%*
Complete Season					
STD Full Price Known	4.1%	23.7%	35.6%	*767.8%*	*50.0%*
STD Intermediate Price Only (Floor)	70.1%	35.4%	29.8%	*-57.4%*	*-15.7%*
STD Unpriced	25.8%	40.9%	34.6%	*34.1%*	*-15.4%*

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100% Orange Juice Delivered Retail Value in 2025-26

Orange Juice at Retail – Season-YTD through 8/8/26

Total U.S. - xAOC 8/8/2026	Gallons			Dollars			Price per EQ Gallon		
	S-YTD 2024-25	S-YTD 2025-26	% Chg	S-YTD 2024-25	S-YTD 2025-26	% Chg	S-YTD 2024-25	S-YTD 2025-26	% Chg
TL OJ REF NFC	166.18 M	161.58 M	-2.77%	$1,958.47 M	$2,080.97 M	6.26%	$11.79	$12.88	9.28%
NFC <11oz	2.80 M	2.77 M	-0.99%	$54.61 M	$57.00 M	4.39%	$19.54	$20.60	5.43%
NFC 11-20oz	3.44 M	3.65 M	6.36%	$84.99 M	$92.49 M	8.83%	$24.74	$25.31	2.32%
NFC 20-40oz	1.72 M	1.18 M	-31.74%	$37.05 M	$31.55 M	-14.85%	$21.48	$26.80	24.74%
NFC 40-70oz	112.29 M	107.98 M	-3.84%	$1,283.65 M	$1,348.03 M	5.02%	$11.43	$12.48	9.21%
NFC 70-110oz	38.37 M	39.20 M	2.18%	$427.63 M	$481.76 M	12.66%	$11.15	$12.29	10.25%
NFC >110oz	7.57 M	6.80 M	-10.16%	$70.53 M	$70.14 M	-0.56%	$9.32	$10.32	10.69%
TL OJ REF RECON	70.07 M	63.78 M	-8.97%	$655.25 M	$604.23 M	-7.79%	$9.35	$9.47	1.30%
TOTAL 100% OJ	**250.74 M**	**236.05 M**	**-5.86%**	**$2,751.1 M**	**$2,790.7 M**	**1.44%**	**$10.97**	**$11.82**	**7.75%**

OJ Category Delivered at Retail in 2025-26

Total OJ Dollar Sales (YTD)

$2.79B

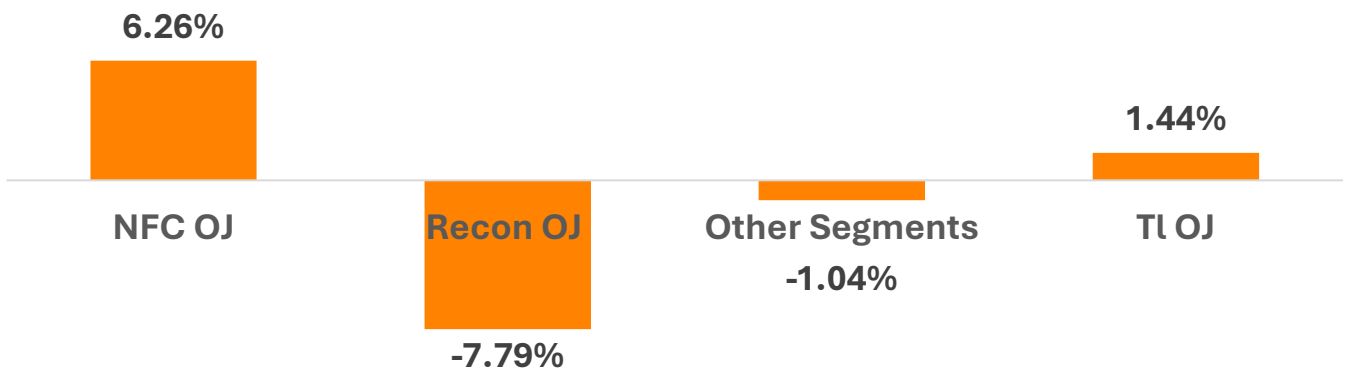
+1.4% vs last season

NFC OJ Dollar Sales (YTD)

$2.08B

+6.3% vs last season

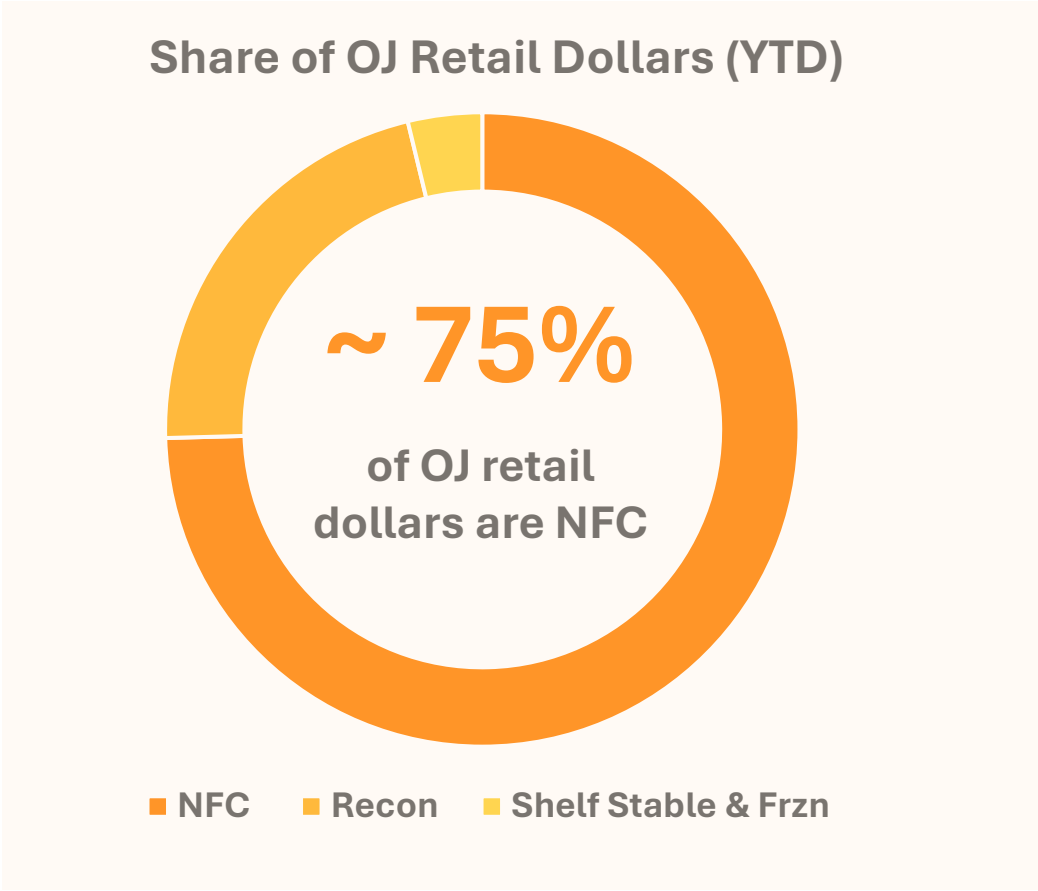
Change in OJ Retail Dollar Sales, by Segment 2025-26 vs. 2024-25 (S-YTD)





DOLLARS

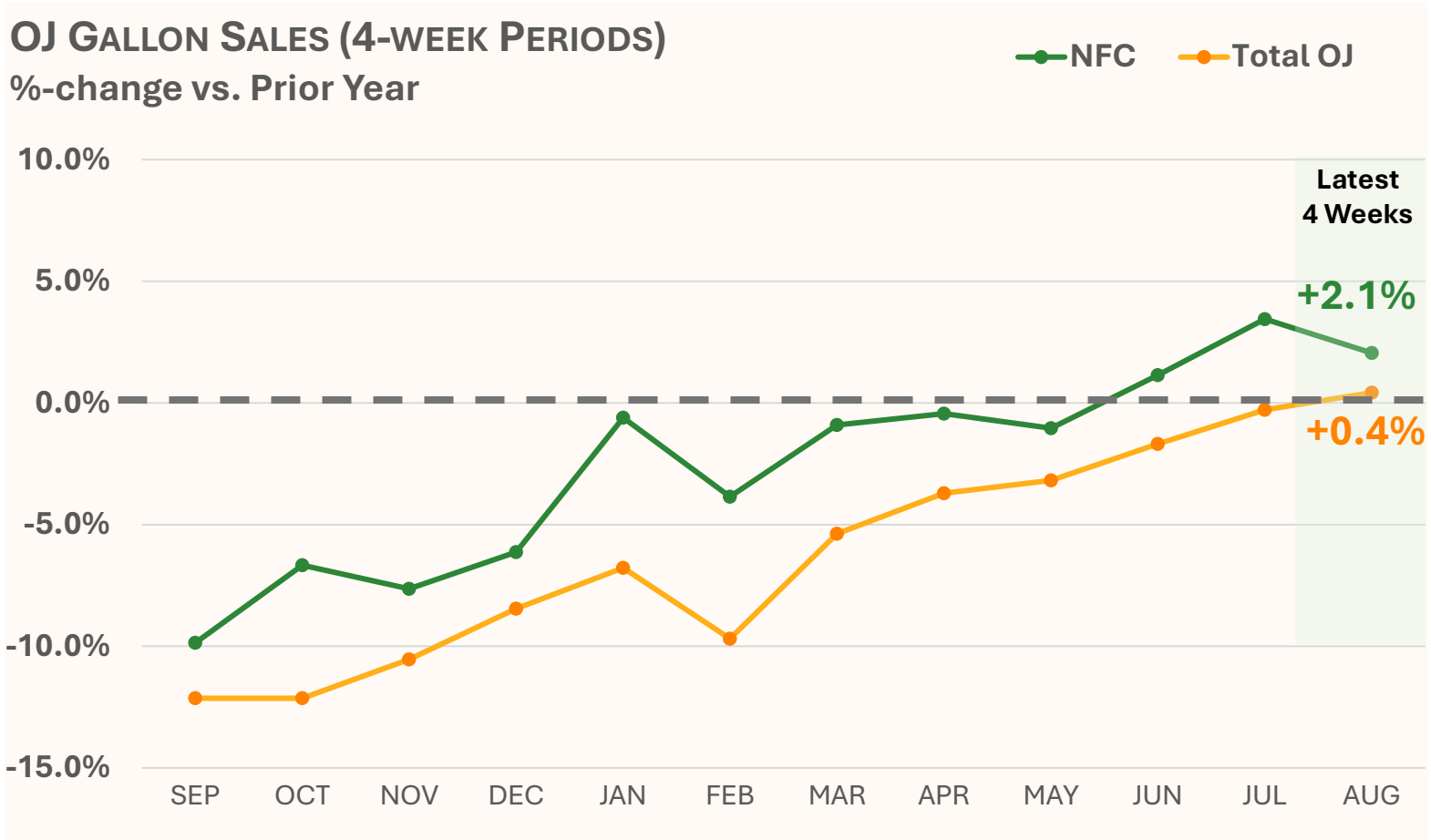
NFC OJ is Driving OJ Category Performance



	Dollars	%-Chg	%-Dollars sold on Promo
TL OJ REF NFC	**$2.08 B**	**6.26%**	**25.6%**
NFC <11oz	$57.0 M	4.39%	6.1%
NFC 11-20oz	$92.5 M	8.83%	21.0%
NFC 20-40oz	$31.6 M	-14.85%	11.6%
NFC 40-70oz	$1.35 B	5.02%	33.6%
NFC 70-110oz	$481.8 M	12.66%	8.9%
NFC >110oz	$70.1 M	-0.56%	16.2%
TL OJ REF RECON	**$604.2 M**	**-7.79%**	**28.6%**

VOLUME

NFC OJ is Driving OJ Category Performance



NFC OJ Performance by Size (YTD)	
11-20oz Single-Serve	+6.36%
NFC 70-110oz (Family Sizes)	+2.18%

NFC OJ Performance by Distribution Measures(YTD)	
%-ACV	96%
Avg # Items	+0.33%
Total Distribution Pts	+0.42%

Total GJ - SYTD

Grapefruit Juice at Retail – Season-YTD through 8/8/26

Total U.S. – xAOC 8/8/2026	Gallons			Dollars			Price per EQ Gallon		
	2024-25	2025-26	% Chg	2024-25	2025-26	% Chg	2024-25	2025-26	% Chg
TL GJ	8,001,074	7,391,876	-7.61%	$94,862,009	$90,371,253	-4.73%	$11.86	$12.23	3.12%
TL GJ REF NFC	5,474,663	4,738,135	-13.45%	$68,722,580	$61,774,234	-10.11%	$12.55	$13.04	3.86%
TL GJ REF RECON	204,445	285,661	39.73%	$4,748,988	$6,698,316	41.05%	$23.23	$23.45	0.95%
TL GJ FRZ	7,603	35,256	363.73%	$47,847	$261,477	446.49%	$6.29	$7.42	17.85%
TL GJ SHELF STABLE	2,314,363	2,332,824	0.80%	$21,342,593	$21,637,225	1.38%	$9.22	$9.28	0.58%

Retail Takeaways

- **$2.79B in OJ Retail Sales**

  Total OJ dollar sales up **1.4%** season YTD, demonstrating retail value amid shortages

- **NFC OJ Driving Category Performance**

  NFC OJ represents 75% of retail OJ dollars, with dollar sales up 6.3%, with several package sizes up for the season

- **NFC OJ Exhibits Volume Strength Amid Shortages**

  Single serve and family sizes exhibit season YTD volume growth. NFC OJ volume gains occurred in some 4-week periods



Recent Volume Trends are Encouraging Signs of Demand Resilience

Retrospective of 25-26 Season

- Overall, Florida citrus production forecast of 14.76 million boxes oranges, grapefruit, and tangerines represents a 6.2% increase when compared to the 2024-25 season,
  - Orange Juice yield increased
  - Fresh orange distribution increased
  - Grower price for Category A fruit signified cash market value.
  - SSOJ into NFC movement outpaced decline in availability, but FCOJ declines reflected reality of lost shelf space and higher prices in previous season.

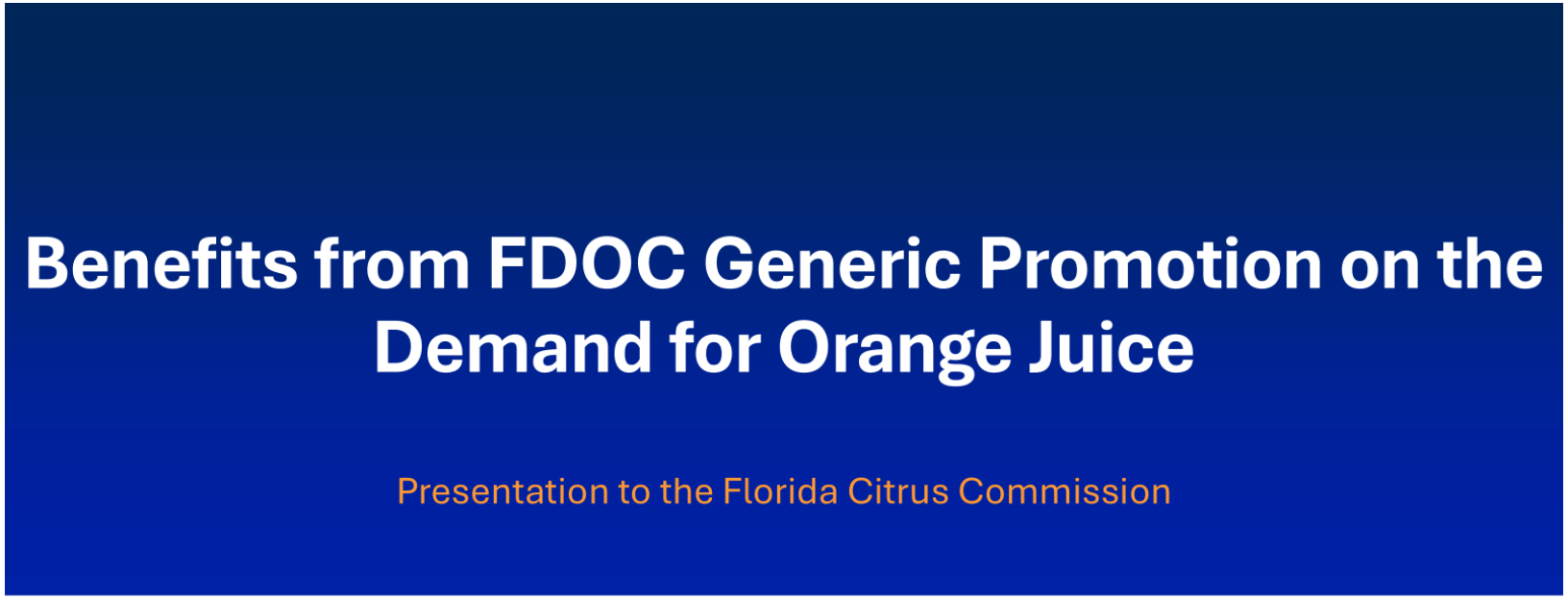


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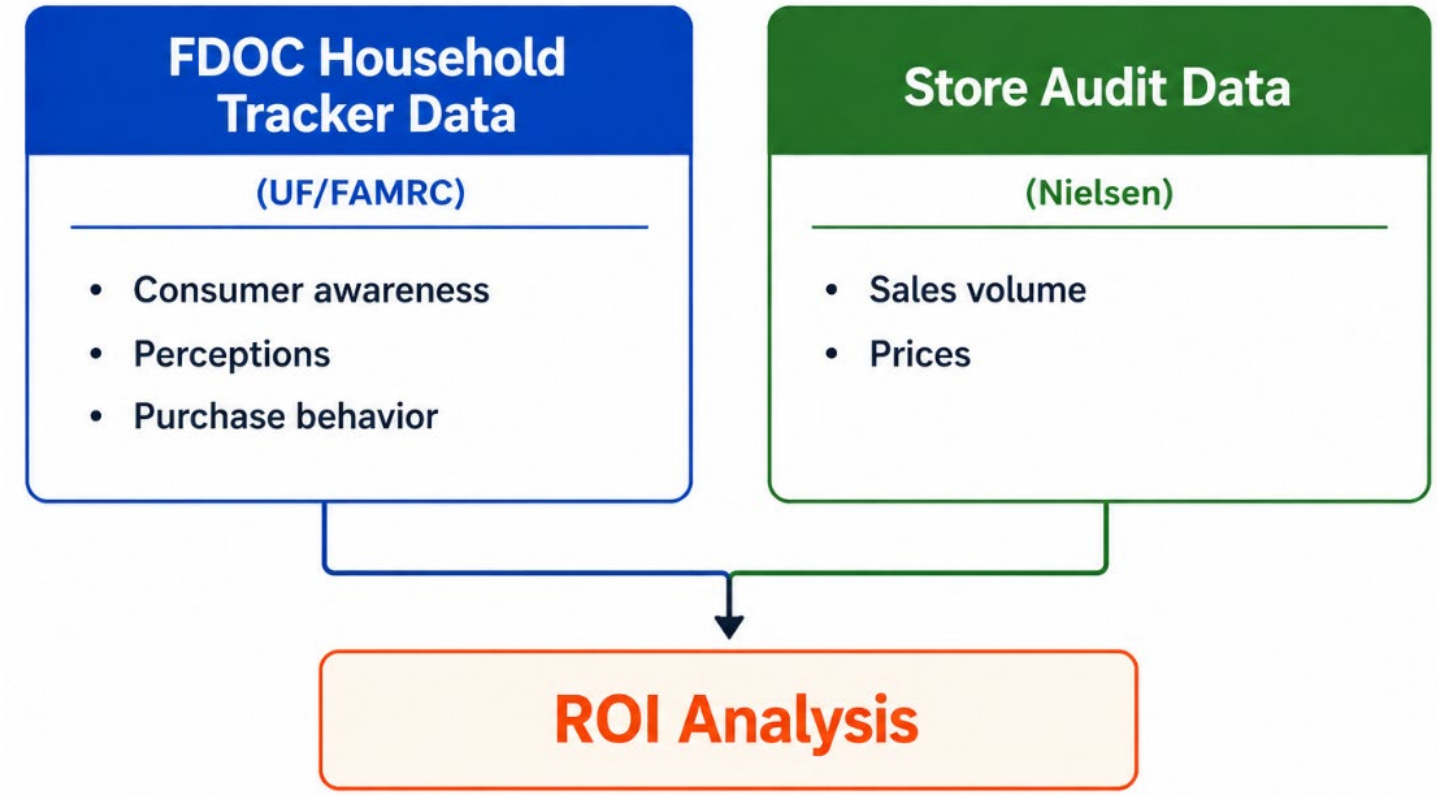
FDOC Promotions: Measuring the Return



September 16, 2026

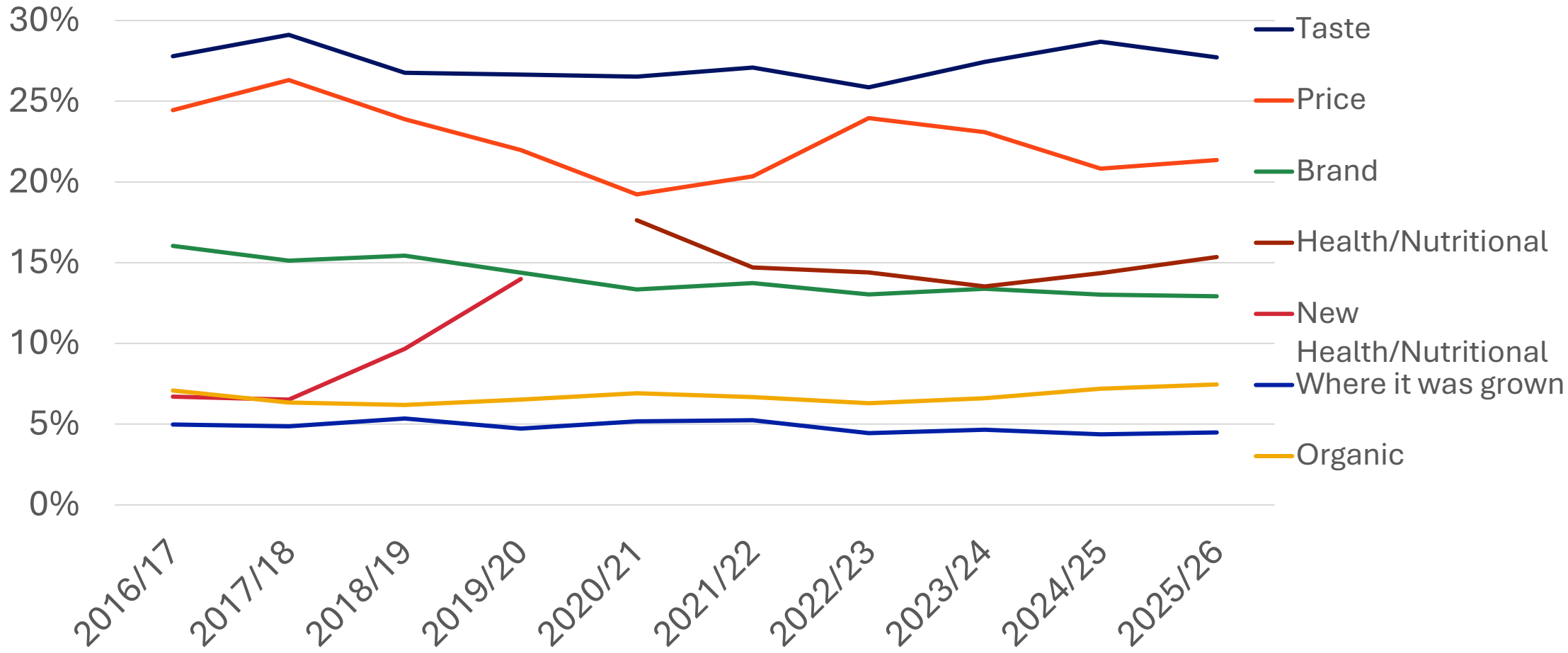
Dr. Lisa House
Prepared with Dr. Sungeun Yoon, UF FAMRC

FDOC ROI Analysis/Data Sources



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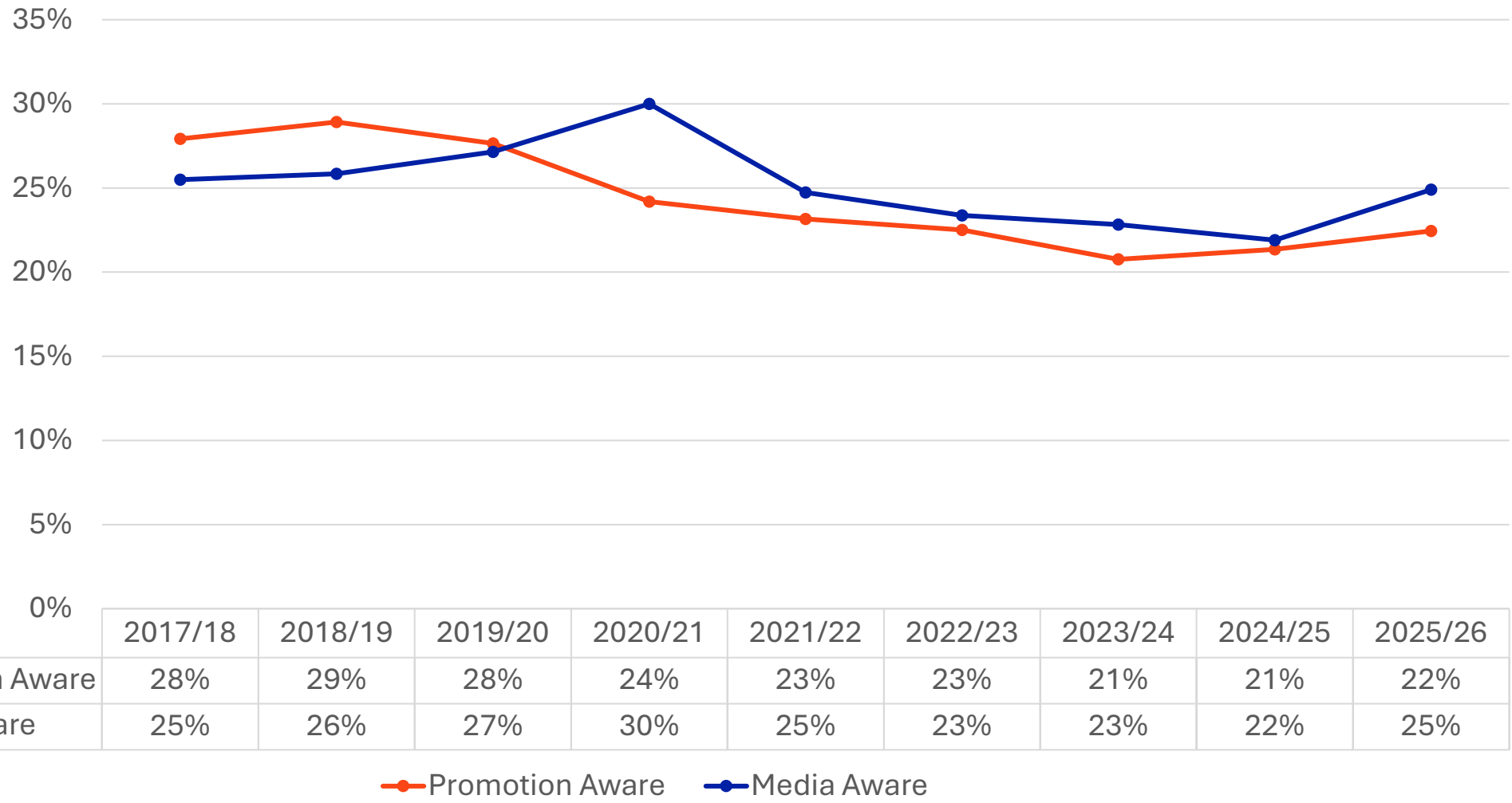
Factors considered when buying OJ (first choice)



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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Awareness of Promotions and Media Mentioning about OJ

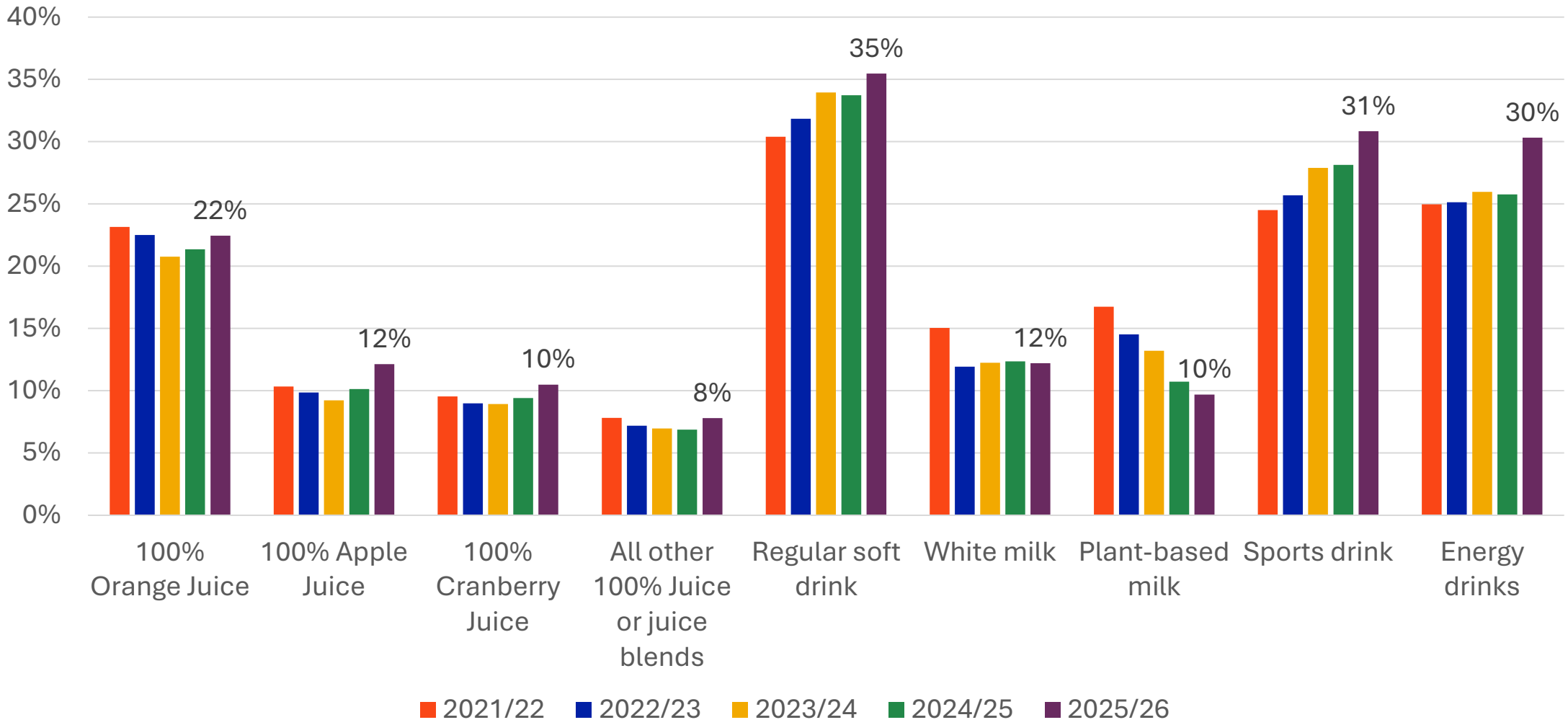


	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
Promotion Aware	28%	29%	28%	24%	23%	23%	21%	21%	22%
Media Aware	25%	26%	27%	30%	25%	23%	23%	22%	25%

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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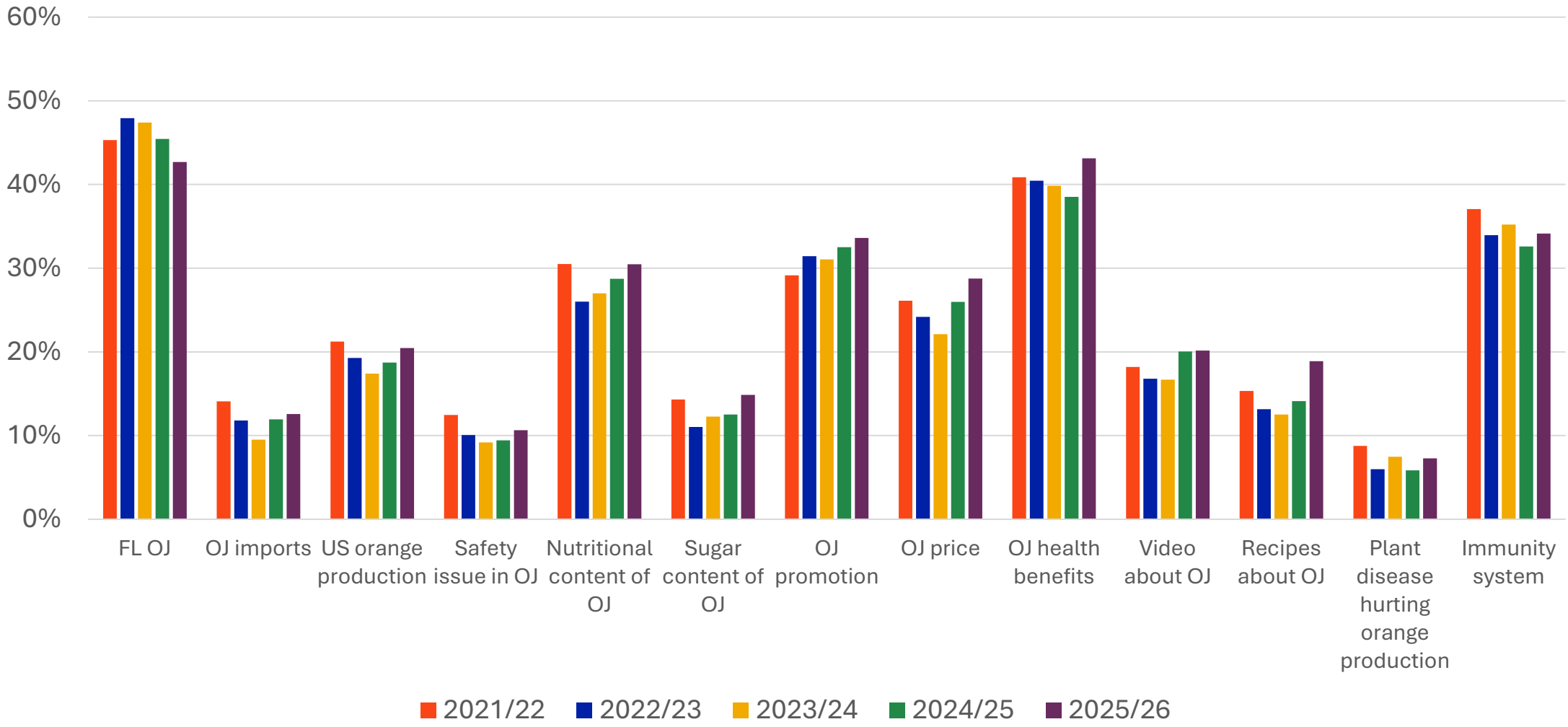
OJ Promotion Awareness Compared



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)

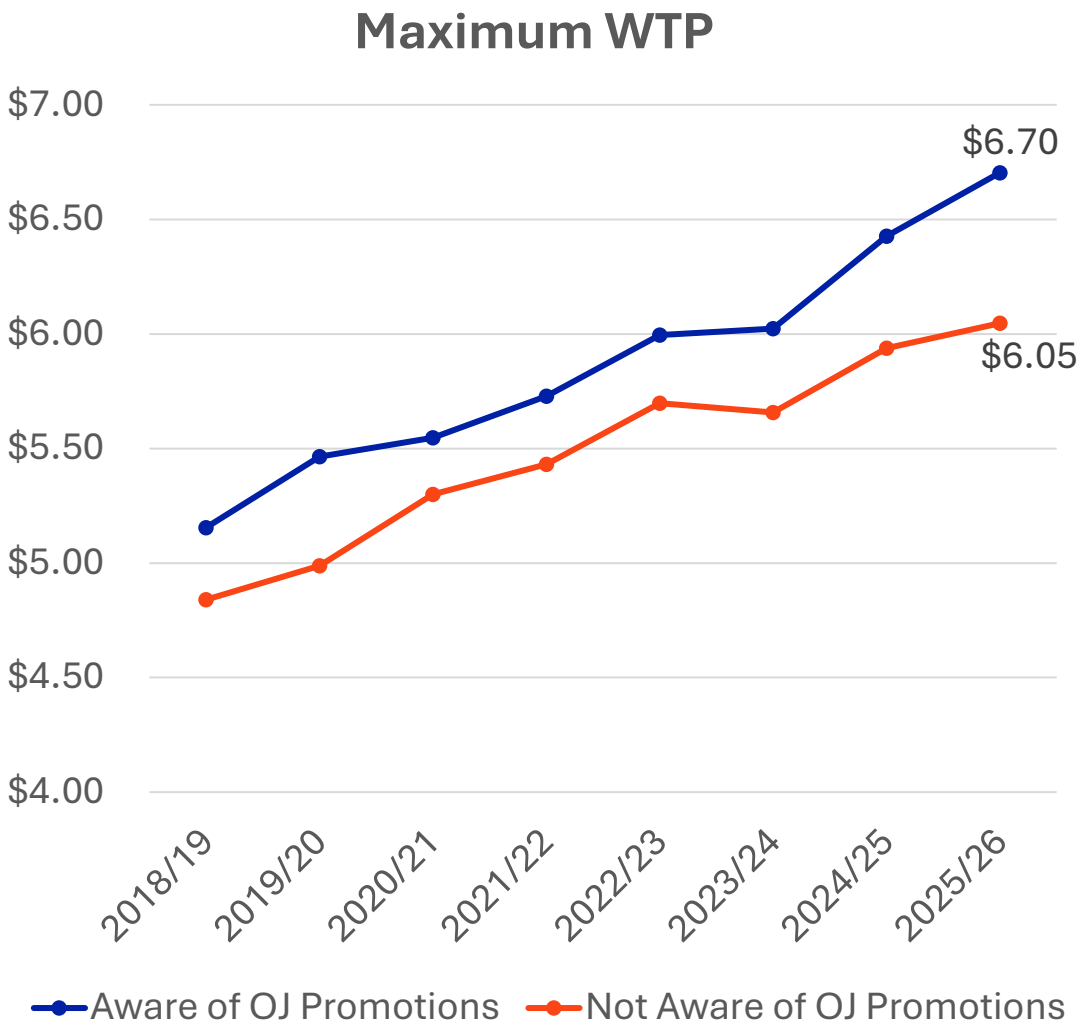
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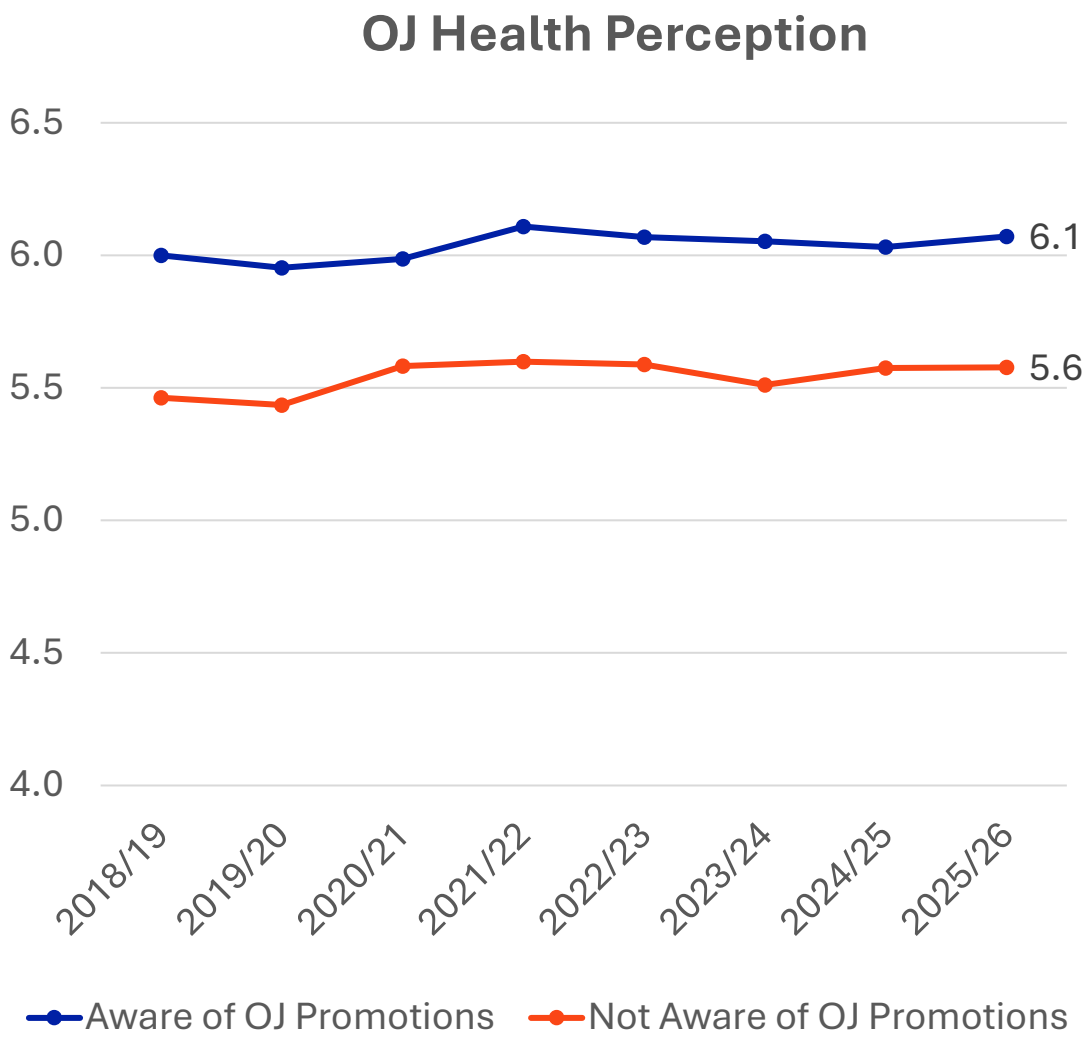
Topics mentioned by those who reported hearing positive news about OJ



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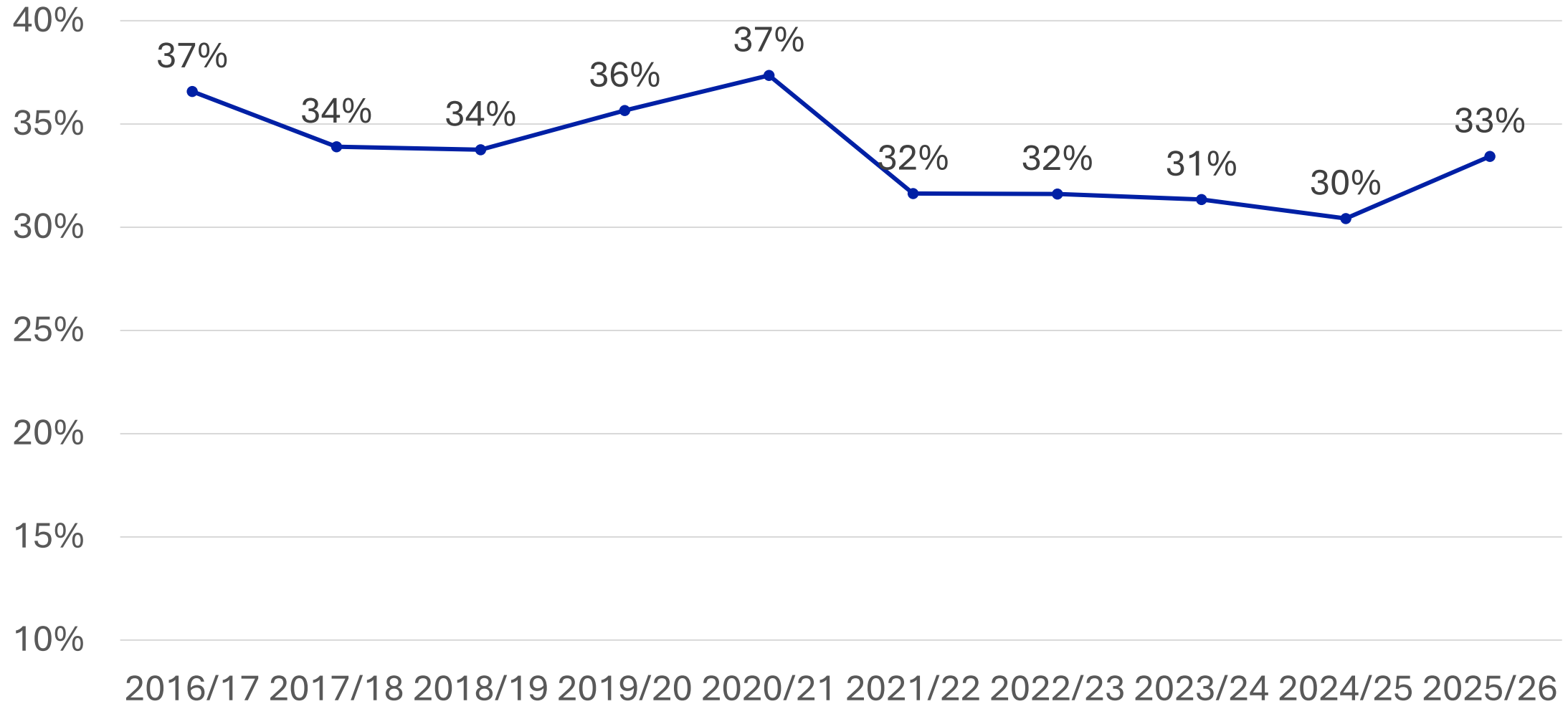
OJ Promotion Awareness and OJ Price and Health Benefits





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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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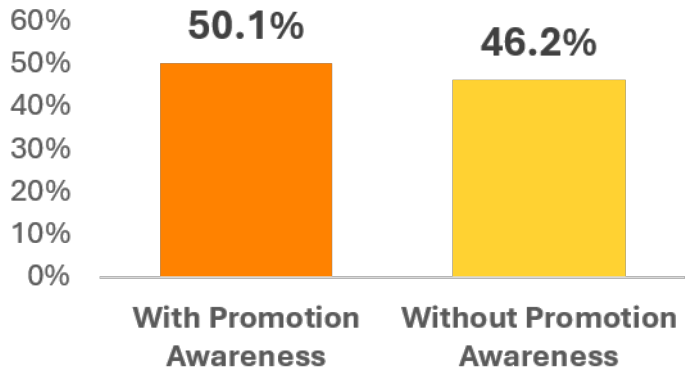
The Measurable Impact of FDOC Promotion

Promotion Supports Higher Market Penetration

+3.9

Percentage points

higher estimated market penetration associated with promotion



*Promotion Awareness Model

Return on Investment

$2.64 - $3.40

For Every $1 Spent

Estimated return for FDOC promotion delivered-in to domestic juice*

* Promotion Awareness Model and Nielsen Store Audit Data Model

Promotion Supports Significant Volume

78.49

Million Gallons

estimated gallons of OJ supported by promotion awareness

14.27

Million Boxes

(90-lb equivalent)

Thank you

