FY26-27 Domestic Marketing Update



September FCC Meeting

Agenda

The State of Social Media

Industry Update

- Florida Citrus Media Audit
- Brix & FDA Announcements
- Industry Events & Conferences

Domestic Florida Orange Juice Marketing Program Update

- Latest Dashboard Report
- Digital Advertising Performance
- Creative Updates
- Latest Media Placements & Updates
- Tampa Bay Lightning Partnership

FY 26-27 Fresh Citrus Update

- Fresh Citrus Workshops (Grapefruit and Orange)
- Revised Plans with Retail Focus



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The State of Social Media

How FDOC is navigating an evolving social media landscape.



The Role of Social Media has Changed

Social is no longer simply a place to build followers and publish content.

- It is increasingly where consumers discover, search, learn, validate and buy.
- Different platforms now serve fundamentally different roles.
- Organic reach alone is increasingly unreliable.
- The opportunity is not to be everywhere; it is to invest where consumer behavior and FDOC’s objectives intersect

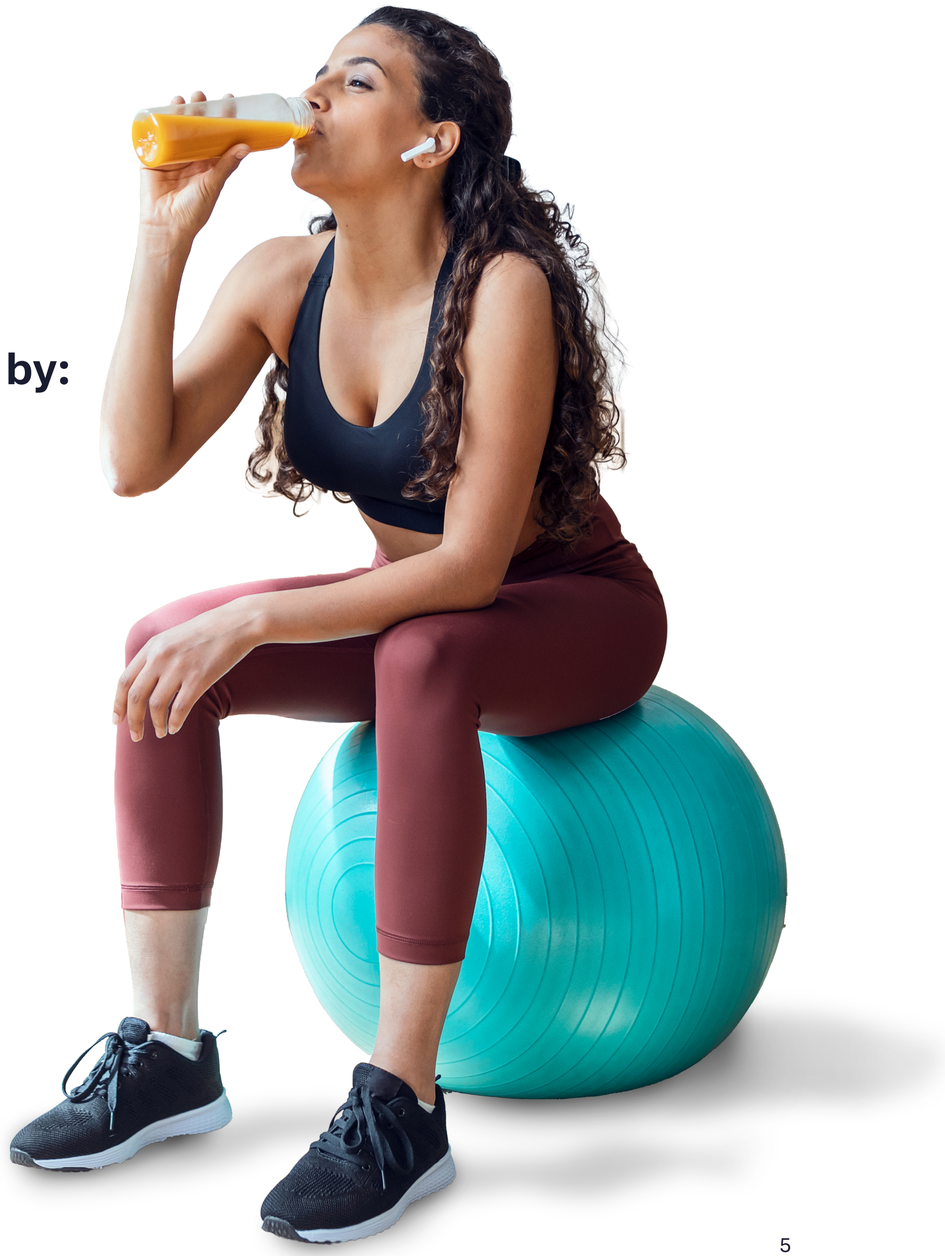


We Start With the Consumer, not the Platform

FDOC's social strategy is built around Modern Juice Consumers, a roughly 30-40-million-person opportunity audience characterized by:

- Interest in wellness for themselves and their families
- Digital-first behaviors
- Mid- to upper-income households
- Interest in sports, fitness and active lifestyles
- Openness to new ways to incorporate Florida Orange Juice into daily routines

We prioritize the channels, content and creators most capable of making Florida Orange Juice relevant to this audience.



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Every Platform has a Different Job

The channel strategy reflects what consumers are doing on these platforms, not just where a brand can maintain an account.

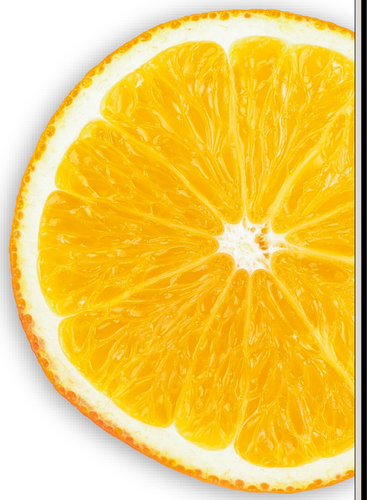
Platform	Primary Role	FDOC Strategic Purpose
Facebook	Scale & Community	Core
Instagram	Discovery & Culture	Core
Pinterest	Search & Inspiration	Core
LinkedIn	B2B Influencer	Selective
YouTube	Search & Education	Selective

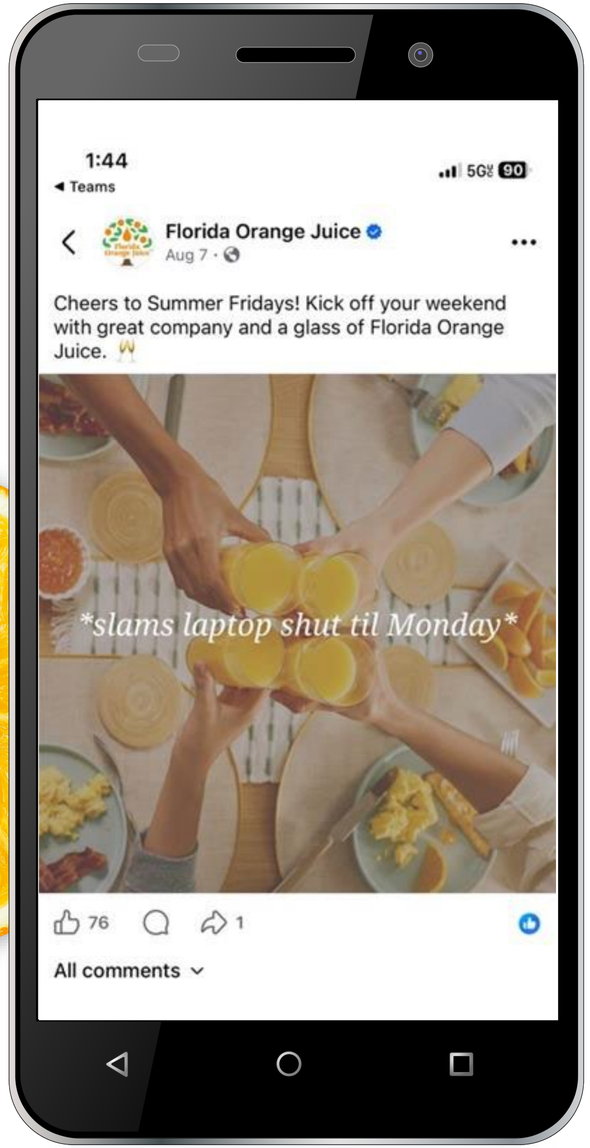
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Facebook: Scale Still Matters

WHAT FACEBOOK IS TODAY: A mature but highly scalable platform, particularly among millennial, Gen X and older consumers.

- AI increasingly determines what users see
- Video and engaging visual content are favored over outbound links
- Organic activity builds familiarity and community
- Paid media gives FDOC precision and scale beyond its existing followers





FDOC STRATEGY: Maintain as a core channel, particularly for broad consumer reach and paid amplification.

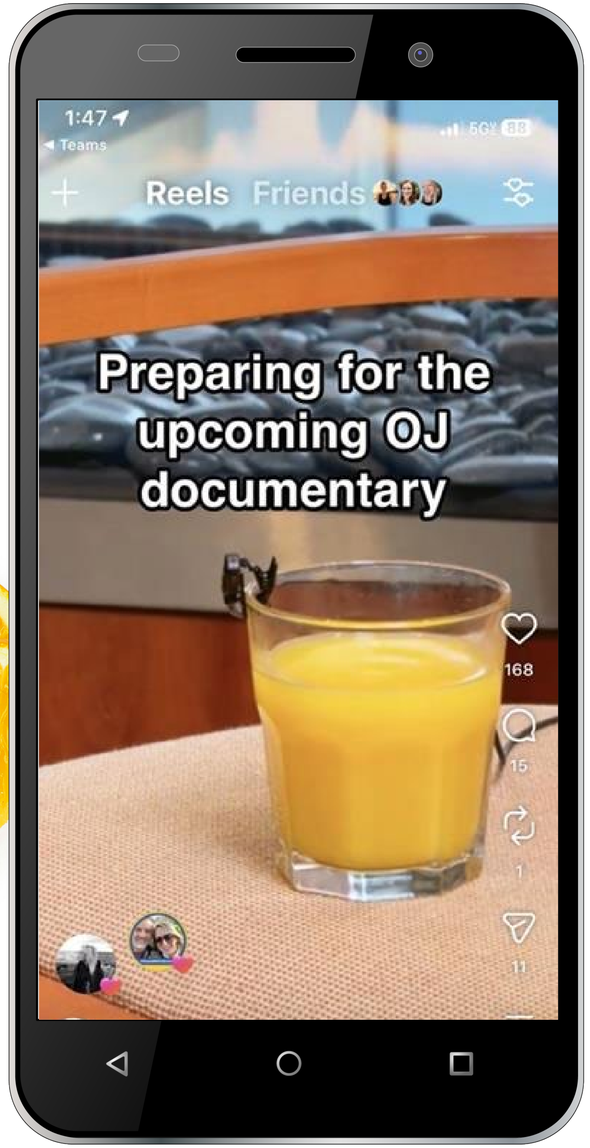
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Instagram: Building Relevance

WHAT INSTAGRAM IS TODAY: A discovery engine built around visual storytelling, creators and culture.

- Reels help brands reach beyond their existing followers
- Carousels encourage deeper engagement and saves
- Shares are increasingly important signals of valuable content
- Creators and UGC bring credibility brands cannot manufacture themselves





FDOC STRATEGY: A core platform for wellness, inspiration, influencers, growers and culturally relevant storytelling.

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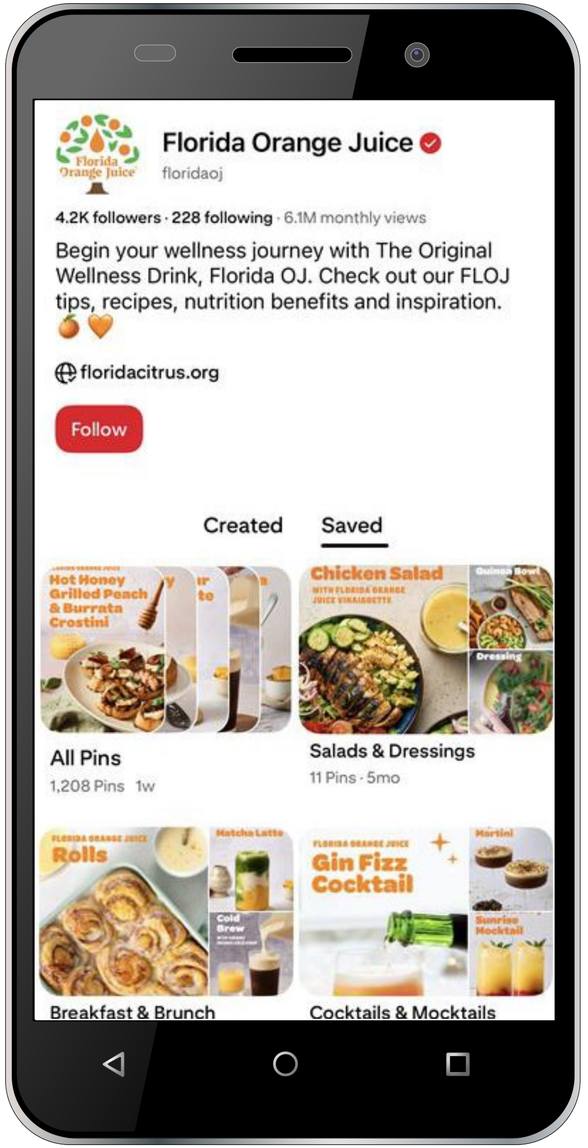
Pinterest: A Particularly Strong fit for FDOC

WHAT PINTEREST IS TODAY: Pinterest behaves less like traditional social media and more like a visual search engine.

Consumers arrive with intent:

- What should I make?
- What should I serve?
- What should I try?
- What fits my lifestyle?





FDOC STRATEGY: Pinterest is not just an awareness channel for FDOC; it connects inspiration to action.

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LinkedIn: Reaching the People who Influence the Industry

WHAT LINKEDIN IS TODAY: The leading professional platform, increasingly shaped by expert voices, industry conversation and thought leadership.

- Strong concentration of working-age professionals, including decision-makers and industry stakeholders
- Algorithm rewards meaningful interaction, expertise and timely perspectives
- Short-form video, document posts and authentic executive content perform particularly well
- Increasingly influential beyond the platform as LinkedIn content surfaces in search and AI-generated answer

FDOC STRATEGY: LinkedIn is used strategically to reach retailers, foodservice partners, industry stakeholders and other B2B audiences. This is done through content that builds confidence in Florida Citrus, demonstrates category leadership and reinforces the value FDOC brings to the marketplace.



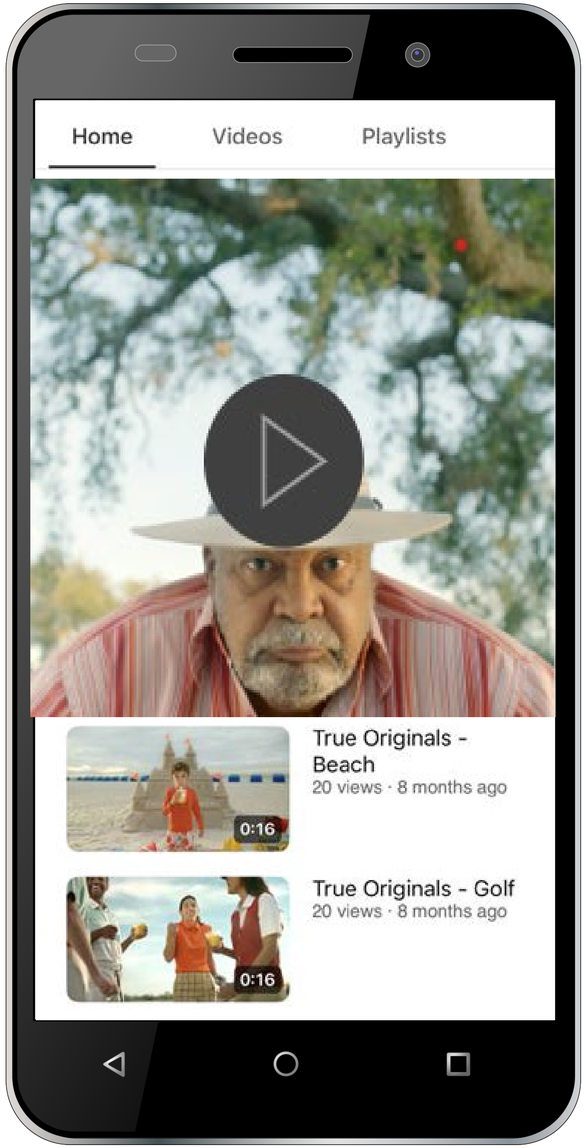
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YouTube: Increasingly Important Because Social and Search are Converging

WHAT YOUTUBE IS TODAY: Part entertainment platform, part social network and part search engine.

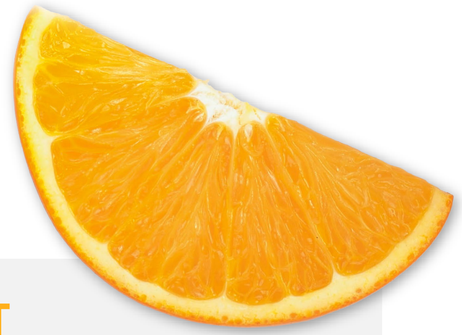
- Consumers actively seek how-to, health and educational content
- Shorts create discovery
- Longer-form video provides depth and longevity
- Content can continue being discovered through both YouTube and Google search
- Aids in GenAI search

FDOC STRATEGY: YouTube is more useful as an intentional content and paid distribution platform than as an always-on social feed, with additional implications from GenAI search.



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Some Platforms are Strategically Less Important for FDOC



TIKTOK

- Highly influential for discovery, culture and younger consumers
- Strong fit for creator-led, native content
- We can still apply lessons from TikTok behavior, including short-form video, creator-style content and fast, culturally relevant storytelling, across other channels

X

- Strongest around news and real-time conversation
- FDOC has not maintained an active presence, and we do not currently see a compelling consumer marketing reason to prioritize it

SNAPCHAT

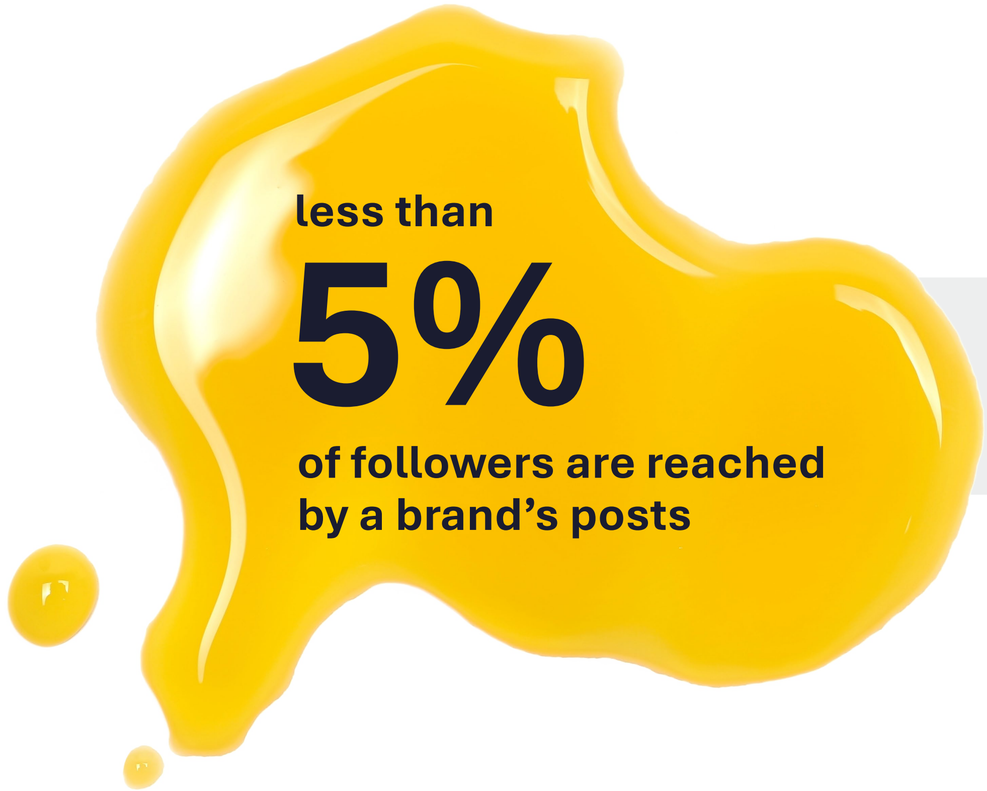
- Strong reach among younger consumers
- More dependent on paid media and high-volume, mobile-first creative
- Currently a lower strategic fit for FDOC than Instagram, Pinterest or creator-led opportunities

Not every influential platform needs to be an FDOC channel. The strategy is to understand the behavior, then apply what is relevant within the channels we can and should use.

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The Fallacy of Followers

Followers are often the first thing you notice when you visit a brand or business page on Facebook, but they aren't a good indicator of who you're reaching.



Add paid media to reach exactly the right audience

INSTEAD MEASURE:

Reach
Impressions
Engagement

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Paid Media Turns Good Content into Targeted Communication

Organic content gives FDOC a consistent brand presence. Paid media ensures the strongest content reaches the consumers we most want to influence.

- Paid targeting extends that content beyond existing followers to Modern Juice Consumers
- Audience targeting can reflect demographics, interests, behaviors and geography
- We can optimize distribution based on the objective, including awareness, engagement or website traffic
- Influencer and UGC content can also be amplified, combining authentic voices with targeted reach
- Performance data helps us continually refine both the audience and the creative approach

Paid social is not separate from organic social. It is the distribution engine that helps the right content reach the right people at meaningful scale.

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All the More Reason That Influencers & Creators Rule the Day



Authenticity



Engaged Followers

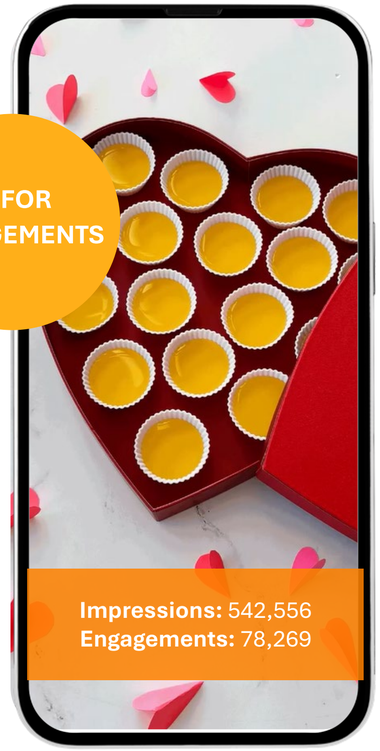


Reach

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When Brands Share Authentic Posts, it all Comes Together

#1 FOR ENGAGEMENTS



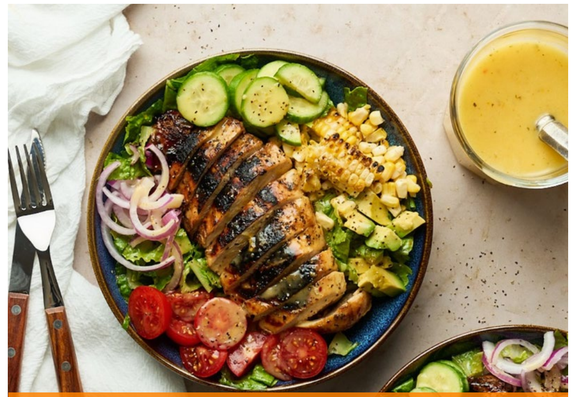
Impressions: 542,556
Engagements: 78,269



Impressions: 694,664
Engagements: 61,975



Impressions: 1,109,426
Engagements: 964



Impressions: 1,049,371
Engagements: 7,191



Impressions: 833,466
Engagements: 23,486



Impressions: 764,551
Engagements: 9,914

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Florida Citrus Industry Updates



MEDIA AUDIT FINDINGS & IMPLICATIONS

Florida Citrus Drives Media Coverage



68%

of media coverage was positive

4,309

total articles analyzed (June 2025-June 2026)

<3%

of coverage framed sugar negatively

43%

of coverage included recipe content

25%

of coverage mentions Florida

MEDIA AUDIT FINDINGS & IMPLICATIONS

Build Relevance, Advance Florida's Story & Own Key Moments

The findings reinforce the strategy already underway, while helping us further refine the media opportunities, priorities and moments where Florida Citrus can have the greatest impact.

2026–27 Priority	What the Audit Reinforces
Build Consumer Relevance	Continue leading with credible nutrition information around immunity, hydration, heart health and timely consumer moments
Advance Grower Roots	Show the faces behind Florida Citrus, resilience efforts and progress to balance production-focused headlines that drive coverage today
Own the Industry Moments	Put growers and industry leaders in front of reporters ahead of crop forecast, weather topics and industry updates, so Florida helps shape the conversation from the start
Plan Around Predictable Opportunities	Efforts to maximize seasonal and topics moments like National Orange Juice Day, winter immunity, summer hydration, holiday entertaining add value
Focus Outreach Where it Matters Most	Use the audit's outlet and coverage-quality findings to prioritize the media relationships and opportunities that can most meaningfully build Florida Citrus relevance and reputation

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Citrus Expo Showcases Florida Citrus Momentum to Industry

Attended and featured FDOC messaging and signage at the AgeNet Citrus & Specialty Crop Expo in August, with upcoming participation at The Global Produce & Floral Show taking place in October:

CITRUS & SPECIALTY CROP EXPO

- Showcased FDOC campaigns and wins via a sizzle reel at the Citrus Expo
- Held conversations with industry members

THE GLOBAL PRODUCE & FLORAL SHOW

- FDOC will host growers at GFPS to support ongoing industry needs

THE GLOBAL PRODUCE & FLORAL SHOW





CITRUS & SPECIALTY CROP EXPO
PRESENTED BY: AgNet MEDIA

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Brix Announcement Builds Momentum Across Media

TOPIC GENERATED 66 UNIQUE ARTICLES (255 IN TOTAL)

11 UNIQUE ARTICLES (42 in total)
mentioned and/or quoted Shannon Shepp

TOTAL UVM: 485.87M

BROADER INDUSTRY MOMENTUM PLAN INCLUDED:

FDOC press release, native article amplification, geo-fenced paid media, SMT with Commissioner Ressler and Shannon Shepp

WinterHavenSun

Secretary Kennedy announces major update to 63-year-old orange juice regulation



AMERICAN AG NETWORK

Florida Department of Citrus Applauds Updated Federal Standard for 100% Orange Juice

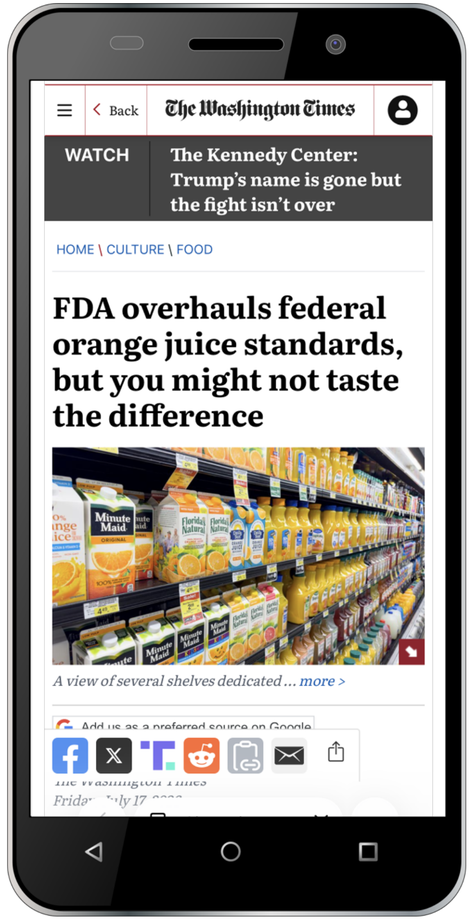


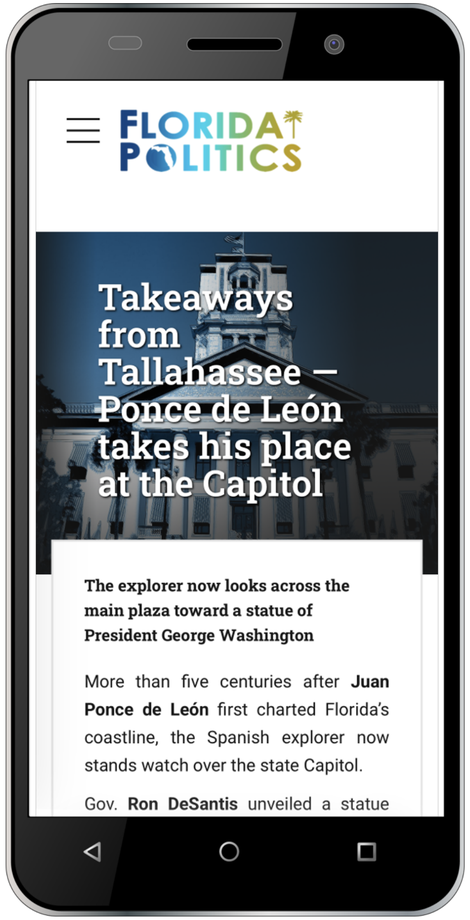


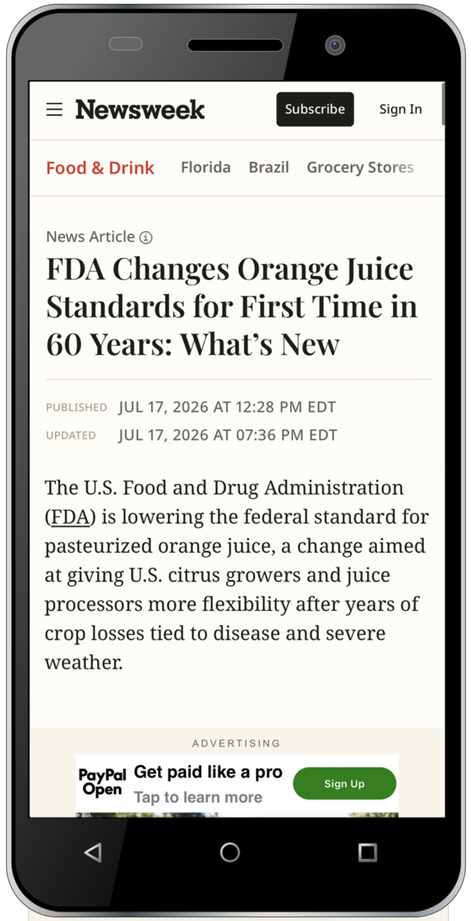
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FDA Standard Update Sparks National and Statewide Coverage











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Satellite Media Tour Spotlights Florida Citrus' Resilience and Recovery

Use a coordinated series of TV interviews to tell a broader Florida Citrus story centered on resilience, recovery and optimism.



WHAT WE DID

- Secured 29 broadcast interviews with outlets including markets such as Atlanta, Tampa, Chicago and New York City.
- Positioned Florida Citrus producers as resilient and forward-looking
- Highlighted tangible signs of momentum, including final crop forecast increase production increase and Brix Standard update
- Elevated FDOC's industry perspective (via Shannon Shepp) and the grower perspective (via Commissioner Ressler)
- Drove consumer confidence in Florida Citrus and 100% orange juice

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Domestic Florida Orange Juice Marketing Program Updates



FY 2026-2027 Florida Citrus: September 11, 2026

FDOC DOMESTIC OJ MARKETING CAMPAIGN

OVERVIEW

BUDGET: $12.16M

Advertising Attributed Sales Goal
$52-56 Million

% To Goal ($52M)
21.17%

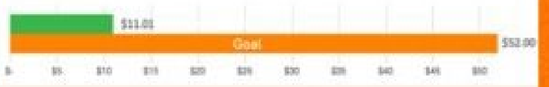
Advertising Attributed Sales
$11,006,126

FY2024-25 Annual FDOC Generic Promotion Return on Investment (ROI)*
$1.69 - $2.23

*Benefits of FDOC Generic Promotion on Demand for OJ, Annual ROI Study, UF-FAMRC

ATTRIBUTED SALES

FDOC 2026 2027 Attributed Sales
(values in millions)



ATTRIBUTED SALES BY PARTNER

Criteo**	Instacart	Walmart	Performance Marketing
$547,195	$2,505,268	N/A	$7,953,663

AUDITED POST ESTIMATE

(Week-ending March 28, 2026)

Early/Mid-Season
No Estimate for 25-26

Valencia
$2.77977

Grapefruit
White: No Estimate for 25-26
Red/Pink: $3.75000 (Final)

Average Price Per Pounds Solids

CROP FORECAST

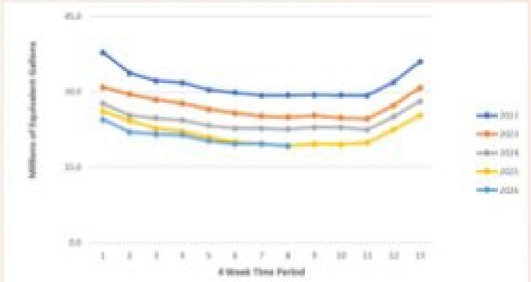
(August 2026)

Florida Oranges
12.95 Million Boxes

Florida Grapefruit
1.35 Million Boxes

Florida Specialty
460,000 Boxes

U.S. TOTAL OJ VOLUME SALES



TOTAL U.S. – XAOC SYTD 2025-26 IN GALLONS

(SYTD – August 8, 2026)

REGION	GALLONS	PRICE PER EQ
South TL OJ	100,270,559	$11.51
Midwest TL OJ	48,882,288	$11.68
West TL OJ	43,355,297	$11.86
Northeast TL OJ	43,643,684	$12.65
TOTAL U.S. TL OJ	236,045,625	$11.82

FDOC CITRUS JUICE STATISTICS

Florida Processors' Statistics Report Summary (Oct-Sep)
Season-to-Date Packaged and Bulk Movement
W/E August 29, 2026, Processors' Statistics Report #48

	2024-25	2025-26	% CHANGE
SSOJ (NFC) (Millions SSG)	250.7	242.4	-3.3%
FCOJ (Millions SSG)	202.8	165.5	-18.4%
SSGJ (NFC) (Millions SSG)	8.2	7.8	-4.9%
FCGJ (Millions SSG)	1.0	1.2	21.4%

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

**Includes these retailers: Albertsons, Meijer, Walgreens, Shipt, Weis Markets, Giant Eagle, Fresh Direct

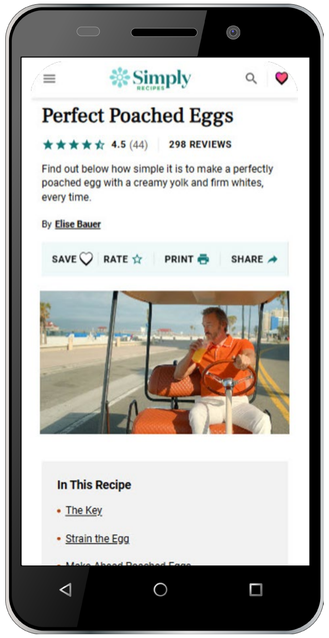
Driving Demand for Florida Orange Juice

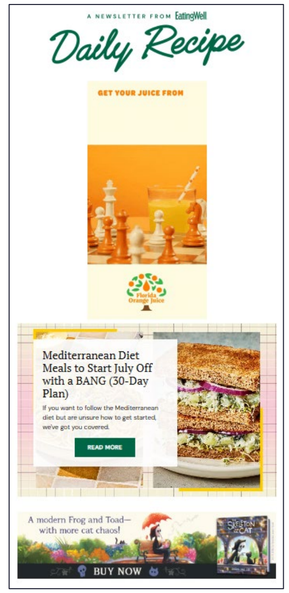
Strengthened Florida Orange Juice performance through a diversified, full-funnel media strategy that reaches modern juice consumers from discovery through purchase.

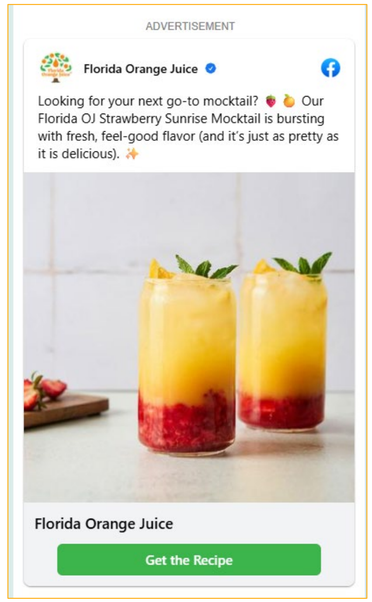
KEY HIGHLIGHTS

- Core performance channels, OLV and display, continued to drive strong results
    - New email display and social amplification expanded reach and strengthened the overall media mix
- Criteo broadened FDOC's retail media presence, reaching shoppers across retailers
- The overall ROAS for Performance Marketing has improved nearly 40% since being introduced indicating the updated UPCs helped accelerate performance
- Paid search drove consumers to high-value Florida Orange Juice content, including recipes, nutrition information and blog posts









$11M Attributed Sales	**63.9M** Impressions	**1.5M** Purchases
$16.93 Average ROAS	**97.55%** VCR	**346K** Clicks

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Fresh Creative to Sustain Momentum for Florida Orange Juice

This year's True Originals and Grower shoots will build on the momentum of previous year's True Originals campaign, continuing to celebrate the energy, drive and passion behind Florida Orange Juice.

UPCOMING PHOTOSHOOT UPDATES

- New imagery and ad spots will reinforce Florida Orange Juice as the Original Wellness Drink, bringing key benefits to life
- Consistent, compelling creative will help sustain the strong brand-lift gains achieved in FY25–26 across purchase intent, wellness positioning and health-benefit perceptions
- The refreshed content will be tested to ensure it further strengthens emotional relevance and keeps Florida Orange Juice top of mind among targeted consumers







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Earned Media Keeps Florida Orange Juice in High-Impact Conversations

The fiscal year is just getting underway, and earned media is already building strong momentum with high-impact coverage including Vogue, EatingWell and ABC Tampa Bay. These early wins are helping keep 100% orange juice and Florida citrus visible in influential conversations reaching consumers both nationally and in key Florida markets.

"We produce graduates who are talented and are ready to go into the groves and work. They're also talented and grounded with basics in business, with that knowledge as well. So they can truly do both things,"

— Dr. Jeremy Martin, President of Florida Southern College.

EatingWell **The #1 Nutrient You May Be Missing for Muscle Health After 50 (No, It's Not Protein)**

New citrus groves at Florida Southern College aims to help growers fight industry decline



VOGUE

4 Drinks That Are More Hydrating Than Water

100% Orange Juice

Ehsani explains that 100% orange juice contains 90% water and natural electrolytes like potassium. "An eight-ounce serving provides 10% of your daily potassium (an electrolyte that maintains fluid balance plus contains no added sugar) needs," she says. Orange juice also contains other nutrients that play a huge role in fluid balance and hydration, such as magnesium and, in fortified varieties, calcium and vitamin D.

How to Get More Vitamin D

Through Foods

Vitamin D isn't found naturally in many foods, but these sources can help you meet your needs:[10]

- Trout, 3 ounces: 645 IU (81% Daily Value)
- Salmon, sockeye, 3 ounces: 571 IU (71% DV)
- Mushrooms, sliced, exposed to ultraviolet (UV) light, ½ cup: 366 IU (46% DV)
- Milk, 2% milkfat, vitamin D fortified, 1 cup: 120 IU (15% DV)
- Egg, with yolk: 44 IU (6% DV)

Fortified foods can also help, such as 100% orange juice, soy milk and ready-to-eat cereal.

Tampa Bay Lightning Partnership Puts Florida Orange Juice at Center Ice

The Tampa Bay Lightning partnership returns this October with an expanded mix of in-arena, broadcast, experiential and social opportunities that position Florida Orange Juice as game-day fuel.



KEY PARTNERSHIP HIGHLIGHTS

- Virtual center-ice logo during all 42 regular-season home game broadcasts
- Bolt Run partnership connecting Florida Orange Juice to hydration and performance
- Dedicated Presenting Game Night in February with opportunities to spotlight growers and support grower attendance, feature integrated branding and promote fan engagement
- Season-long signature Florida Orange Juice mocktail at select arena locations
- Ford Thunder Alley activations with sampling and fan engagement
- Custom ThunderBug social content highlighting Florida Orange Juice game-day fuel



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FY 26-27 Fresh Citrus Update





Dialing in on Fresh Citrus Strategies from Fresh Orange & Grapefruit

OVERVIEW

Held planning discussions and ideation sessions for Fresh Orange and Fresh Grapefruit programs to help guide FY 26-27 plan refinement.

PLANNING WORKSHOP UPDATES

- Shifting Fresh Orange focus to B2B and Foodservice audiences, targeting high volume channels. Refining positioning and creative to align with this approach.
- Fresh Grapefruit programming updated to reflect a retail focused, younger consumer. Programmatic elements aligned to stakeholders' guidance on optimal timing for tactics and priority markets.

GROCERY DIVE

PB PRODUCE BUSINESS



FY26-27 Florida Fresh Grapefruit Plan

Core Campaign Activities & Partnerships

Creative Content Development

Influencer & Social Media

E-Commerce, Display & Retail Promotions

Media Relations & Crisis Communications

COSTCO WHOLESALE

instacart

FY26-27 Fresh Orange Plan

Core Campaign Activities and Partnerships

Creative Content Development

LinkedIn Promotions

Trade Media Outreach

Retail Trade Advertising

Retail Webinars & ABM Campaigns

Foodservice Support & Relationship Building

PB PRODUCE BUSINESS

Progressive GROCER

GROCERY DIVE

THE PACKER

RESTAURANT DIVE

Food Business News


The
Famous
Florida Orange.
Florida Citrus™
When people think of Florida, they think of oranges. When asked about oranges, they think Florida. The Florida Orange is an icon, indeed. Famous for its flavor, famous for its versatility, and especially famous for its juiciness. With fans worldwide, the Florida Orange is always a hit in your produce aisle.
@FloridaCitrusUS
@FloridaOJ
@FloridaCitrusUS
FloridaCitrus.org


Famous for
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Florida Citrus™
When people think of Florida, they think of oranges. When asked about oranges, they think Florida. The Florida Orange is an icon, indeed. Famous for its flavor, famous for its versatility, and especially famous for its juiciness. With fans worldwide, the Florida Orange is always a hit in your produce aisle.
@FloridaCitrusUS
@FloridaOJ
@FloridaCitrusUS
FloridaCitrus.org

Fresh Orange

10:30

Florida Citrus US



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Florida Citrus™

Famous for
a reason.