Retail Promotion Trends

Report # 13 of the 2025-26 Season
Period Ending 10/03/2026

Florida Department of Citrus
Economic and Market Research Department

2025-26

Florida Citrus™

FLORIDA DEPARTMENT OF CITRUS

This EMRD report provides retail promotional trends of orange juice products by U.S. regions and syndicated markets for the period ending 10/03/2026.

Source of data: Nielsen IQ Discover.

xAOC = Expanded All Outlets Combined. xAOC data consists of POS data for U.S. grocery stores doing $2 million and greater annual sales, drug stores doing $1 million and greater annual sales, mass merchandisers (e.g., Target, Walmart), club (e.g., Sam's and BJ's), dollar stores (e.g., Dollar General, Family Dollar and Fred's), and military/DECA.

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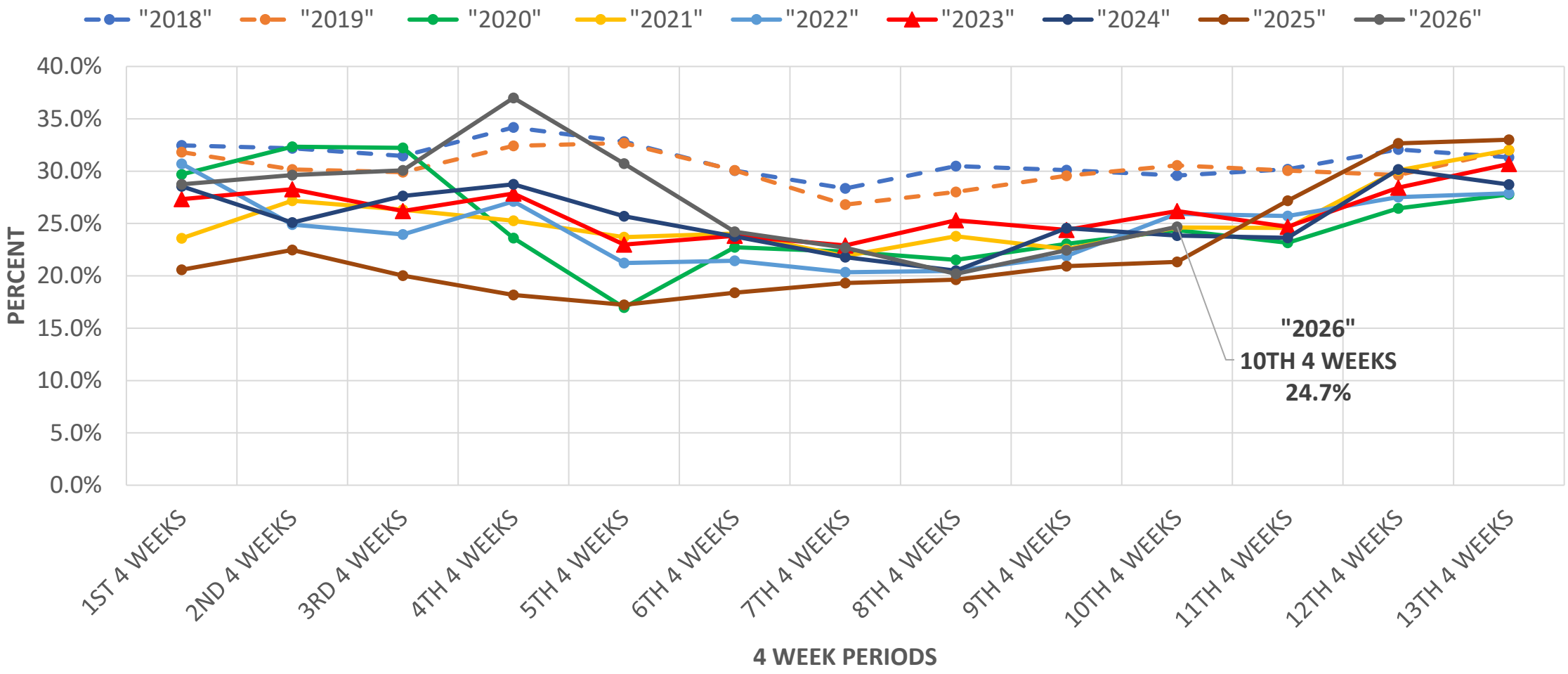
Orange Juice

Summary Promotional Information

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Percent of Total US – XAOC TL OJ Gallons Sold on Promotion



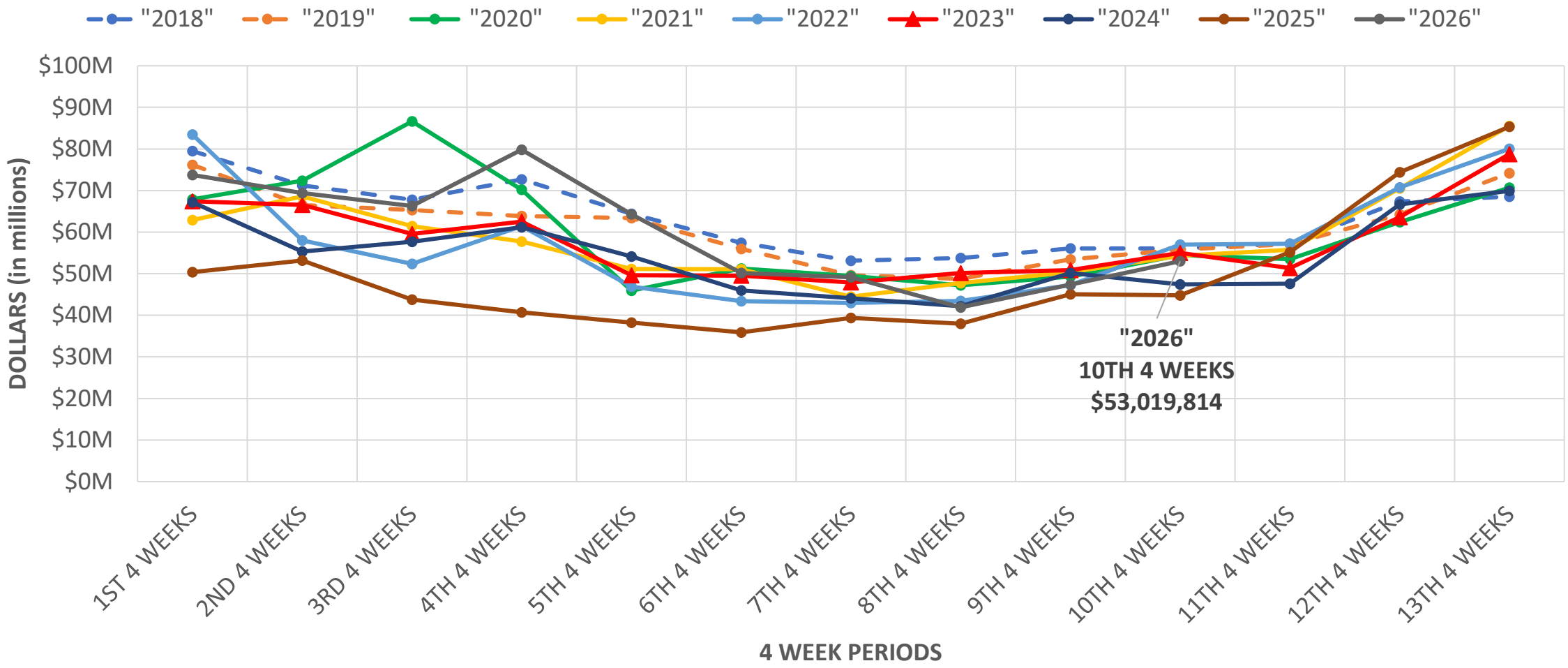
Total xAOC Gallons – 4 Weeks ending 10/03/26

Product	4 WEEK PERIOD ENDING 10/04/2025					4 WEEK PERIOD ENDING 10/03/2026				
	No Promo Gallons	Pct No Promo to Total	Any Promo Gallons	Pct Any Promo to Total	Total Gallons	No Promo Gallons	Pct No Promo to Total	Any Promo Gallons	Pct Any Promo to Total	Total Gallons
TL OJ	**15,414,144**	**79.0%**	**4,107,844**	**21.0%**	**19,521,988**	**14,986,095**	**75.3%**	**4,913,524**	**24.7%**	**19,899,618**
OJ REF NFC	**10,226,846**	**78.8%**	**2,747,498**	**21.2%**	**12,974,344**	**10,102,801**	**73.6%**	**3,618,537**	**26.4%**	**13,721,338**
OJ REF NFC < 11 OZ	234,912	92.7%	18,383	7.3%	253,295	226,925	89.6%	26,226	10.4%	253,151
OJ REF NFC 11-20 OZ	228,798	73.0%	84,615	27.0%	313,413	237,029	66.6%	118,809	33.4%	355,838
OJ REF NFC 20-40 OZ	104,697	85.7%	17,448	14.3%	122,144	81,381	85.0%	14,384	15.0%	95,764
OJ REF NFC 40-70 OZ	6,258,774	75.3%	2,057,498	24.7%	8,316,272	6,147,027	68.0%	2,895,806	32.0%	9,042,834
OJ REF NFC 70OZ-110 OZ	2,916,367	85.1%	510,394	14.9%	3,426,761	2,958,626	86.3%	468,271	13.7%	3,426,898
OJ REF NFC 110 + OZ	483,299	89.1%	59,160	10.9%	542,458	451,813	82.6%	95,040	17.4%	546,853
OJ REF RECON	**4,186,055**	**76.7%**	**1,272,364**	**23.3%**	**5,458,419**	**4,117,807**	**76.9%**	**1,234,905**	**23.1%**	**5,352,712**
OJ REF RECON < 11 OZ	1,728	98.5%	26	1.5%	1,754	1,574	99.9%	2	0.1%	1,576
OJ REF RECON 11-20 OZ	33,288	90.7%	3,417	9.3%	36,705	36,277	88.9%	4,551	11.1%	40,828
OJ REF RECON 20-40 OZ	37,734	70.3%	15,942	29.7%	53,675	52,209	72.8%	19,502	27.2%	71,711
OJ REF RECON 40-70 OZ	2,440,732	73.2%	892,524	26.8%	3,333,256	2,165,178	74.2%	754,577	25.8%	2,919,756
OJ REF RECON 70-110 OZ	826,128	77.7%	237,196	22.3%	1,063,324	1,118,564	87.1%	166,149	12.9%	1,284,713
OJ REF RECON 110 + OZ	846,445	87.3%	123,260	12.7%	969,705	744,004	71.9%	290,123	28.1%	1,034,128

Total xAOC Gallons – S-YTD ending 10/03/26

Product	2024-25 (S-YTD)					2025-26 (S-YTD)				
	No Promo Gallons	Pct No Promo to Total	Any Promo Gallons	Pct Any Promo to Total	Total Gallons	No Promo Gallons	Pct No Promo to Total	Any Promo Gallons	Pct Any Promo to Total	Total Gallons
TL OJ	**227,148,765**	**78.3%**	**62,806,619**	**21.7%**	**289,955,384**	**198,262,838**	**71.9%**	**77,295,017**	**28.1%**	**275,557,855**
OJ REF NFC	**149,451,985**	**77.7%**	**42,872,034**	**22.3%**	**192,324,019**	**134,638,625**	**71.3%**	**54,069,792**	**28.7%**	**188,708,416**
OJ REF NFC < 11 OZ	3,021,596	91.4%	284,884	8.6%	3,306,479	3,041,376	92.9%	231,139	7.1%	3,272,515
OJ REF NFC 11-20 OZ	3,059,975	75.4%	999,272	24.6%	4,059,247	3,215,730	74.1%	1,126,059	25.9%	4,341,789
OJ REF NFC 20-40 OZ	1,454,176	73.7%	517,677	26.3%	1,971,853	1,165,810	85.3%	201,344	14.7%	1,367,154
OJ REF NFC 40-70 OZ	92,303,680	71.5%	36,729,396	28.5%	129,033,076	79,297,973	63.0%	46,479,422	37.0%	125,777,395
OJ REF NFC 70OZ-110 OZ	42,419,024	93.8%	2,819,504	6.2%	45,238,528	41,507,743	90.2%	4,493,874	9.8%	46,001,617
OJ REF NFC 110 + OZ	7,193,535	82.5%	1,521,301	17.5%	8,714,836	6,409,992	80.6%	1,537,954	19.4%	7,947,946
OJ REF RECON	**62,411,971**	**77.1%**	**18,530,262**	**22.9%**	**80,942,233**	**52,310,472**	**70.3%**	**22,129,640**	**29.7%**	**74,440,112**
OJ REF RECON < 11 OZ	61,258	96.9%	1,941	3.1%	63,198	19,776	89.7%	2,272	10.3%	22,048
OJ REF RECON 11-20 OZ	538,248	86.4%	84,407	13.6%	622,655	457,113	90.4%	48,718	9.6%	505,831
OJ REF RECON 20-40 OZ	543,364	66.3%	276,066	33.7%	819,430	603,670	69.5%	264,309	30.5%	867,980
OJ REF RECON 40-70 OZ	36,318,482	73.0%	13,429,066	27.0%	49,747,548	28,642,293	68.7%	13,070,838	31.3%	41,713,131
OJ REF RECON 70-110 OZ	13,249,074	84.4%	2,457,033	15.6%	15,706,107	12,597,641	69.3%	5,568,188	30.7%	18,165,829
OJ REF RECON 110 + OZ	11,701,544	83.7%	2,281,750	16.3%	13,983,294	9,989,980	75.9%	3,175,314	24.1%	13,165,294

Total US – XAOC TL OJ Dollars Sold on Promotion



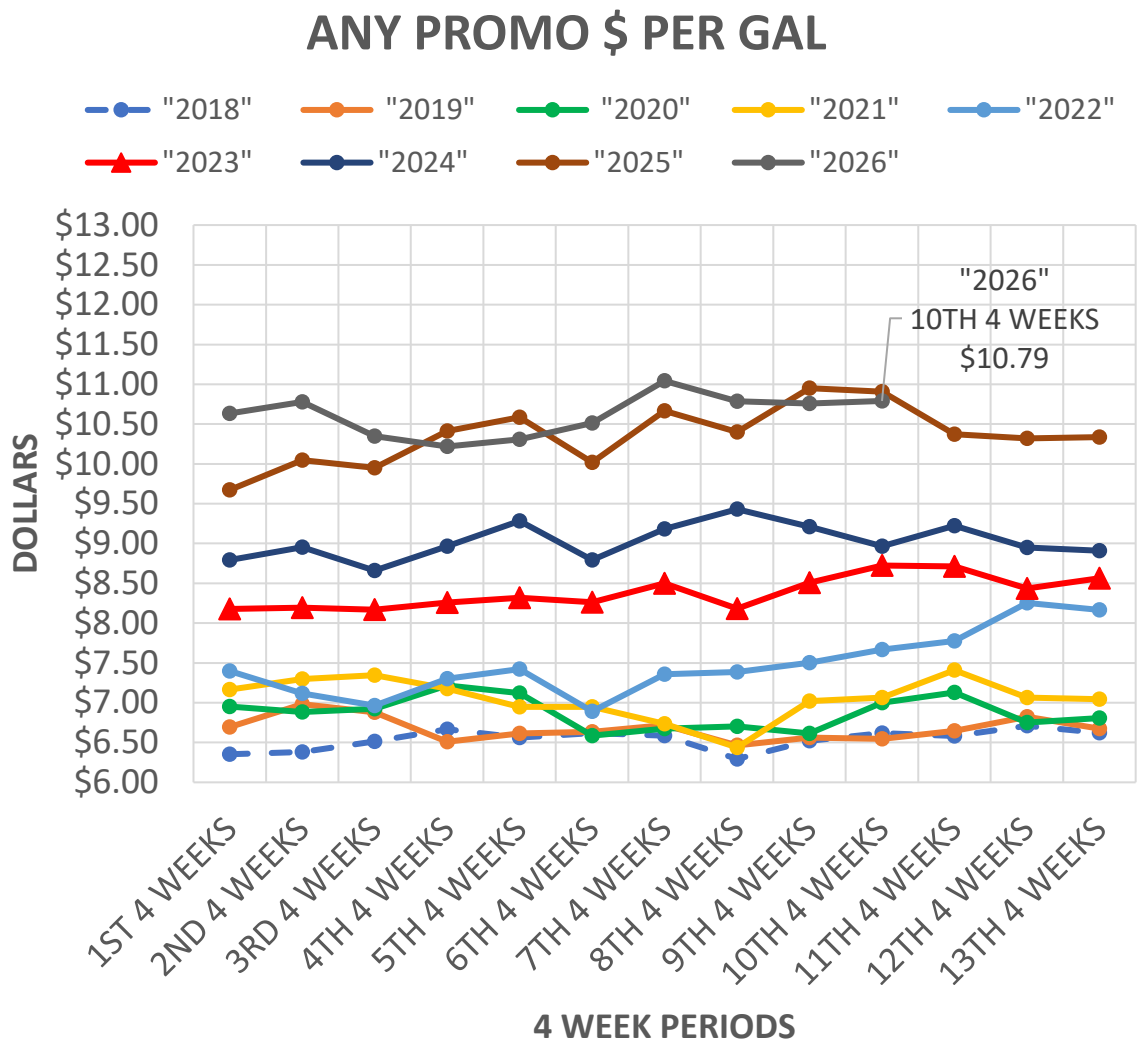
Total xAOC Dollars –4 Weeks ending 10/03/26

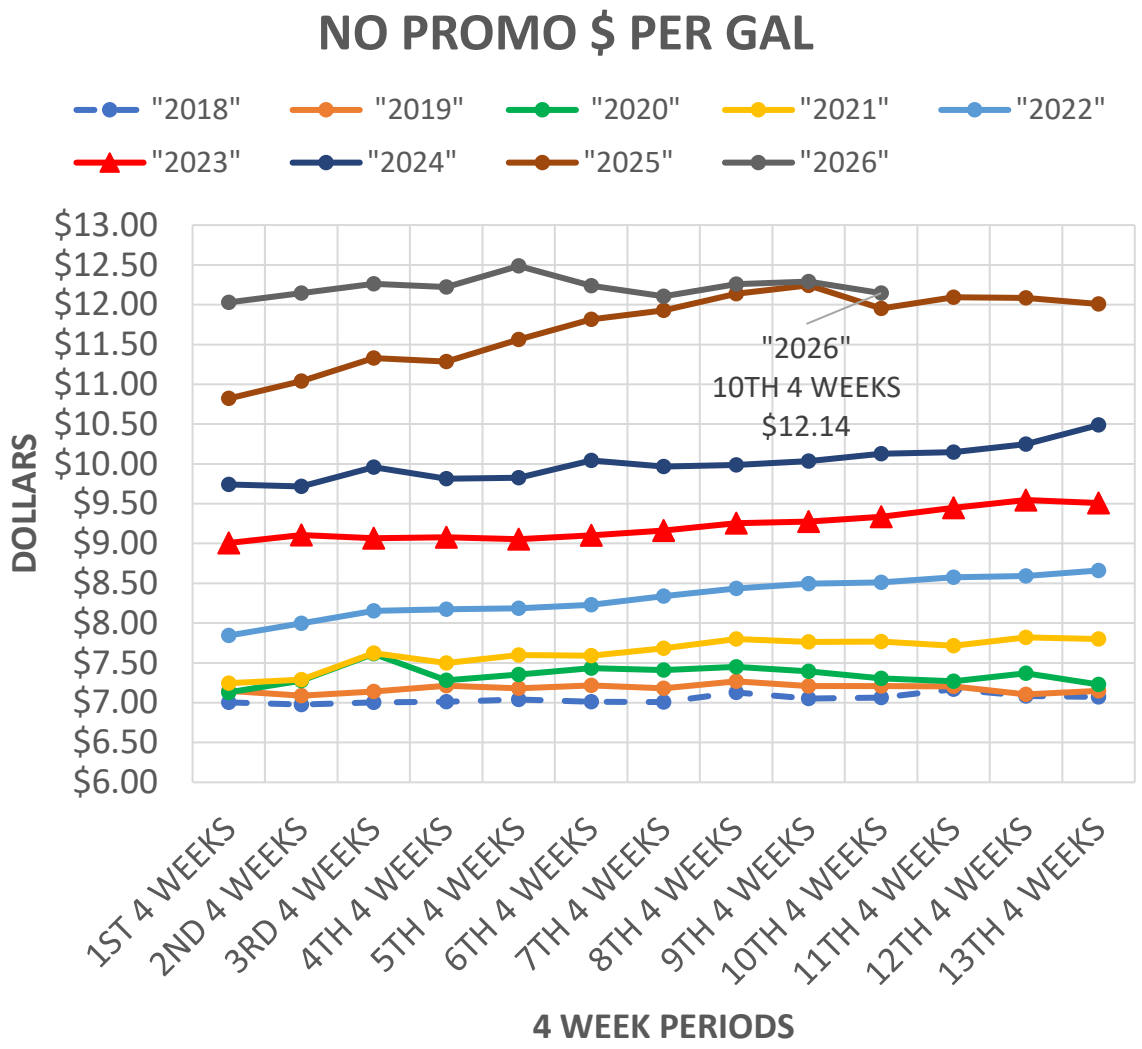
Product	4 WEEK PERIOD ENDING 10/04/2025					4 WEEK PERIOD ENDING 10/03/2026				
	No Promo Dollars	Pct No Promo to Total	Any Promo Dollars	Pct Any Promo to Total	Total Dollars	No Promo Dollars	Pct No Promo to Total	Any Promo Dollars	Pct Any Promo to Total	Total Dollars
TL OJ	**$188,274,200**	**80.7%**	**$45,111,410**	**19.3%**	**$233,385,610**	**$181,997,491**	**77.4%**	**$53,019,814**	**22.6%**	**$235,017,305**
OJ REF NFC	**$137,014,565**	**80.8%**	**$32,534,585**	**19.2%**	**$169,549,150**	**$135,368,930**	**76.3%**	**$42,151,612**	**23.7%**	**$177,520,542**
OJ REF NFC <11 OZ	$4,734,031	93.4%	$336,505	6.6%	$5,070,536	$4,791,740	90.6%	$495,487	9.4%	$5,287,226
OJ REF NFC 11-20 OZ	$6,029,190	77.2%	$1,778,078	22.8%	$7,807,268	$6,147,745	71.2%	$2,483,292	28.8%	$8,631,037
OJ REF NFC 20-40 OZ	$2,693,845	90.4%	$286,271	9.6%	$2,980,115	$2,365,753	87.3%	$344,686	12.7%	$2,710,439
OJ REF NFC 40-70 OZ	$83,110,235	77.8%	$23,768,834	22.2%	$106,879,069	$80,651,689	71.2%	$32,617,467	28.8%	$113,269,156
OJ REF NFC 70 OZ-110 OZ	$35,535,094	86.0%	$5,808,167	14.0%	$41,343,261	$36,539,334	87.4%	$5,273,418	12.6%	$41,812,753
OJ REF NFC 110 + OZ	$4,912,170	89.8%	$556,730	10.2%	$5,468,901	$4,872,668	83.9%	$937,262	16.1%	$5,809,931
OJ REF RECON	**$41,372,600**	**78.0%**	**$11,687,946**	**22.0%**	**$53,060,546**	**$39,120,883**	**79.3%**	**$10,224,076**	**20.7%**	**$49,344,958**
OJ REF RECON <11 OZ	$29,469	98.7%	$380	1.3%	$29,849	$26,968	99.9%	$37	0.1%	$27,005
OJ REF RECON 11-20 OZ	$635,947	90.9%	$63,570	9.1%	$699,517	$858,349	88.1%	$115,944	11.9%	$974,293
OJ REF RECON 20-40 OZ	$730,966	78.1%	$204,849	21.9%	$935,815	$991,444	79.0%	$263,606	21.0%	$1,255,050
OJ REF RECON 40-70 OZ	$24,948,900	75.7%	$8,019,198	24.3%	$32,968,097	$21,347,369	77.3%	$6,251,722	22.7%	$27,599,091
OJ REF RECON 70-110 OZ	$9,274,736	78.8%	$2,488,690	21.2%	$11,763,426	$11,387,116	87.4%	$1,641,086	12.6%	$13,028,202
OJ REF RECON 110 + OZ	$5,752,583	86.3%	$911,259	13.7%	$6,663,842	$4,509,637	69.8%	$1,951,679	30.2%	$6,461,317

Total xAOC Dollars – S-YTD ending 10/03/26

Product	2024-25 (S-YTD)					2025-26 (S-YTD)				
	No Promo Dollars	Pct No Promo to Total	Any Promo Dollars	Pct Any Promo to Total	Total Dollars	No Promo Dollars	Pct No Promo to Total	Any Promo Dollars	Pct Any Promo to Total	Total Dollars
TL OJ	**$2,594,684,602**	**80.6%**	**$625,524,176**	**19.4%**	**$3,220,208,778**	**$2,442,674,596**	**74.9%**	**$817,403,333**	**25.1%**	**$3,260,077,929**
OJ REF NFC	**$1,844,963,541**	**80.2%**	**$454,450,154**	**19.8%**	**$2,299,413,695**	**$1,821,896,697**	**74.8%**	**$612,888,143**	**25.2%**	**$2,434,784,840**
OJ REF NFC <11 OZ	$59,553,521	91.9%	$5,239,754	8.1%	$64,793,276	$63,202,574	93.5%	$4,387,270	6.5%	$67,589,845
OJ REF NFC 11-20 OZ	$79,782,620	79.4%	$20,682,396	20.6%	$100,465,017	$85,816,187	78.4%	$23,675,623	21.6%	$109,491,811
OJ REF NFC 20-40 OZ	$35,212,965	81.8%	$7,848,134	18.2%	$43,061,099	$32,487,428	88.1%	$4,382,042	11.9%	$36,869,470
OJ REF NFC 40-70 OZ	$1,121,582,002	74.9%	$376,857,223	25.1%	$1,498,439,224	$1,059,256,570	67.3%	$514,092,788	32.7%	$1,573,349,358
OJ REF NFC 70 OZ-110 OZ	$479,631,710	93.9%	$31,129,980	6.1%	$510,761,691	$513,338,655	90.8%	$51,979,915	9.2%	$565,318,570
OJ REF NFC 110 + OZ	$69,200,722	84.5%	$12,692,666	15.5%	$81,893,388	$67,795,282	82.5%	$14,370,505	17.5%	$82,165,787
OJ REF RECON	**$603,060,136**	**79.2%**	**$158,513,250**	**20.8%**	**$761,573,386**	**$509,538,474**	**72.5%**	**$193,348,938**	**27.5%**	**$702,887,412**
OJ REF RECON <11 OZ	$991,199	97.2%	$28,269	2.8%	$1,019,468	$337,303	90.3%	$36,304	9.7%	$373,607
OJ REF RECON 11-20 OZ	$10,194,523	89.3%	$1,223,513	10.7%	$11,418,036	$10,072,618	90.9%	$1,008,295	9.1%	$11,080,913
OJ REF RECON 20-40 OZ	$10,010,879	76.0%	$3,161,126	24.0%	$13,172,005	$11,783,495	76.9%	$3,538,371	23.1%	$15,321,866
OJ REF RECON 40-70 OZ	$354,793,364	75.5%	$115,039,622	24.5%	$469,832,986	$291,743,442	71.8%	$114,606,116	28.2%	$406,349,558
OJ REF RECON 70-110 OZ	$142,337,650	85.1%	$24,977,161	14.9%	$167,314,811	$129,955,753	71.2%	$52,551,594	28.8%	$182,507,347
OJ REF RECON 110 + OZ	$84,732,521	85.7%	$14,083,559	14.3%	$98,816,080	$65,645,863	75.2%	$21,608,257	24.8%	$87,254,120

Total US – XAOC TL OJ Price per Gallon





Total xAOC Price – 4 weeks ending 10/03/26

Product	4 WEEK PERIOD ENDING 10/04/2025			4 WEEK PERIOD ENDING 10/03/2026			Pct Chg Total Dollars per Gallon
	No Promo Dollars per Eq Gallon	Any Promo Dollars per Eq Gallon	Total Dollars per Eq Gallon	No Promo Dollars per Eq Gallon	Any Promo Dollars per Eq Gallon	Total Dollars per Eq Gallon	
TL OJ	**$12.21**	**$10.98**	**$11.96**	**$12.14**	**$10.79**	**$11.81**	**-1.21%**
OJ REF NFC	**$13.40**	**$11.84**	**$13.07**	**$13.40**	**$11.65**	**$12.94**	**-1.00%**
OJ REF NFC <11 OZ	$20.15	$18.31	$20.02	$21.12	$18.89	$20.89	4.33%
OJ REF NFC 11-20 OZ	$26.35	$21.01	$24.91	$25.94	$20.90	$24.26	-2.63%
OJ REF NFC 20-40 OZ	$25.73	$16.41	$24.40	$29.07	$23.96	$28.30	16.00%
OJ REF NFC 40-70 OZ	$13.28	$11.55	$12.85	$13.12	$11.26	$12.53	-2.54%
OJ REF NFC 70 OZ-110 OZ	$12.18	$11.38	$12.06	$12.35	$11.26	$12.20	1.13%
OJ REF NFC 110 + OZ	$10.16	$9.41	$10.08	$10.78	$9.86	$10.62	5.38%
OJ REF RECON	**$9.88**	**$9.19**	**$9.72**	**$9.50**	**$8.28**	**$9.22**	**-5.17%**
OJ REF RECON <11 OZ	$17.06	$14.71	$17.02	$17.13	$19.07	$17.13	0.66%
OJ REF RECON 11-20 OZ	$19.10	$18.61	$19.06	$23.66	$25.48	$23.86	25.22%
OJ REF RECON 20-40 OZ	$19.37	$12.85	$17.43	$18.99	$13.52	$17.50	0.38%
OJ REF RECON 40-70 OZ	$10.22	$8.98	$9.89	$9.86	$8.29	$9.45	-4.43%
OJ REF RECON 70-110 OZ	$11.23	$10.49	$11.06	$10.18	$9.88	$10.14	-8.33%
OJ REF RECON 110 + OZ	$6.80	$7.39	$6.87	$6.06	$6.73	$6.25	-9.08%

Total xAOC Price – S-YTD ending 10/03/26

Product	2024-25 (S-YTD)			2025-26 (S-YTD)			Pct Chg Total Dollars per Gallon
	No Promo Dollars per Eq Gallon	Any Promo Dollars per Eq Gallon	Total Dollars per Eq Gallon	No Promo Dollars per Eq Gallon	Any Promo Dollars per Eq Gallon	Total Dollars per Eq Gallon	
TL OJ	**$11.42**	**$9.96**	**$11.11**	**$12.32**	**$10.58**	**$11.83**	**6.53%**
OJ REF NFC	**$12.34**	**$10.60**	**$11.96**	**$13.53**	**$11.34**	**$12.90**	**7.92%**
OJ REF NFC <11 OZ	$19.71	$18.39	$19.60	$20.78	$18.98	$20.65	5.40%
OJ REF NFC 11-20 OZ	$26.07	$20.70	$24.75	$26.69	$21.03	$25.22	1.89%
OJ REF NFC 20-40 OZ	$24.22	$15.16	$21.84	$27.87	$21.76	$26.97	23.49%
OJ REF NFC 40-70 OZ	$12.15	$10.26	$11.61	$13.36	$11.06	$12.51	7.72%
OJ REF NFC 70 OZ-110 OZ	$11.31	$11.04	$11.29	$12.37	$11.57	$12.29	8.85%
OJ REF NFC 110 + OZ	$9.62	$8.34	$9.40	$10.58	$9.34	$10.34	10.01%
OJ REF RECON	**$9.66**	**$8.55**	**$9.41**	**$9.74**	**$8.74**	**$9.44**	**0.36%**
OJ REF RECON <11 OZ	$16.18	$14.57	$16.13	$17.06	$15.98	$16.95	5.04%
OJ REF RECON 11-20 OZ	$18.94	$14.50	$18.34	$22.04	$20.70	$21.91	19.46%
OJ REF RECON 20-40 OZ	$18.42	$11.45	$16.07	$19.52	$13.39	$17.65	9.82%
OJ REF RECON 40-70 OZ	$9.77	$8.57	$9.44	$10.19	$8.77	$9.74	3.15%
OJ REF RECON 70-110 OZ	$10.74	$10.17	$10.65	$10.32	$9.44	$10.05	-5.69%
OJ REF RECON 110 + OZ	$7.24	$6.17	$7.07	$6.57	$6.81	$6.63	-6.21%

Total xAOC Price (per Unit) – S-YTD ending 10/03/26

Product	2024-25 (S-YTD)			2025-26 (S-YTD)			Pct Chg Total Dollars per Unit
	No Promo Dollars per Unit	Any Promo Dollars per Unit	Total Dollars per Unit	No Promo Dollars per Unit	Any Promo Dollars per Unit	Total Dollars per Unit	
TL OJ	**$5.25**	**$3.96**	**$4.94**	**$5.55**	**$4.30**	**$5.18**	**4.81%**
OJ REF NFC	**$5.49**	**$3.94**	**$5.09**	**$5.85**	**$4.24**	**$5.34**	**4.82%**
OJ REF NFC <11 OZ	$5.64	$5.05	$5.59	$5.82	$5.14	$5.77	3.30%
OJ REF NFC 11-20 OZ	$2.37	$1.88	$2.25	$2.57	$1.98	$2.42	7.45%
OJ REF NFC 20-40 OZ	$5.91	$3.48	$5.24	$6.94	$5.36	$6.70	27.87%
OJ REF NFC 40-70 OZ	$5.19	$3.95	$4.81	$5.51	$4.19	$5.00	3.89%
OJ REF NFC 70 OZ-110 OZ	$7.68	$7.58	$7.67	$8.03	$7.77	$8.00	4.37%
OJ REF NFC 110 + OZ	$9.62	$8.34	$9.40	$10.58	$9.34	$10.34	10.01%
OJ REF RECON	**$5.12**	**$4.12**	**$4.88**	**$5.21**	**$4.60**	**$5.03**	**3.14%**
OJ REF RECON <11 OZ	$1.73	$3.62	$1.75	$6.83	$14.11	$7.19	310.12%
OJ REF RECON 11-20 OZ	$2.42	$1.77	$2.32	$2.99	$2.53	$2.94	26.64%
OJ REF RECON 20-40 OZ	$4.57	$2.86	$4.00	$4.11	$3.34	$3.90	-2.44%
OJ REF RECON 40-70 OZ	$4.44	$3.73	$4.24	$4.60	$3.90	$4.38	3.37%
OJ REF RECON 70-110 OZ	$7.47	$7.07	$7.41	$7.17	$6.56	$6.99	-5.69%
OJ REF RECON 110 + OZ	$7.24	$6.17	$7.07	$6.57	$6.81	$6.63	-6.21%

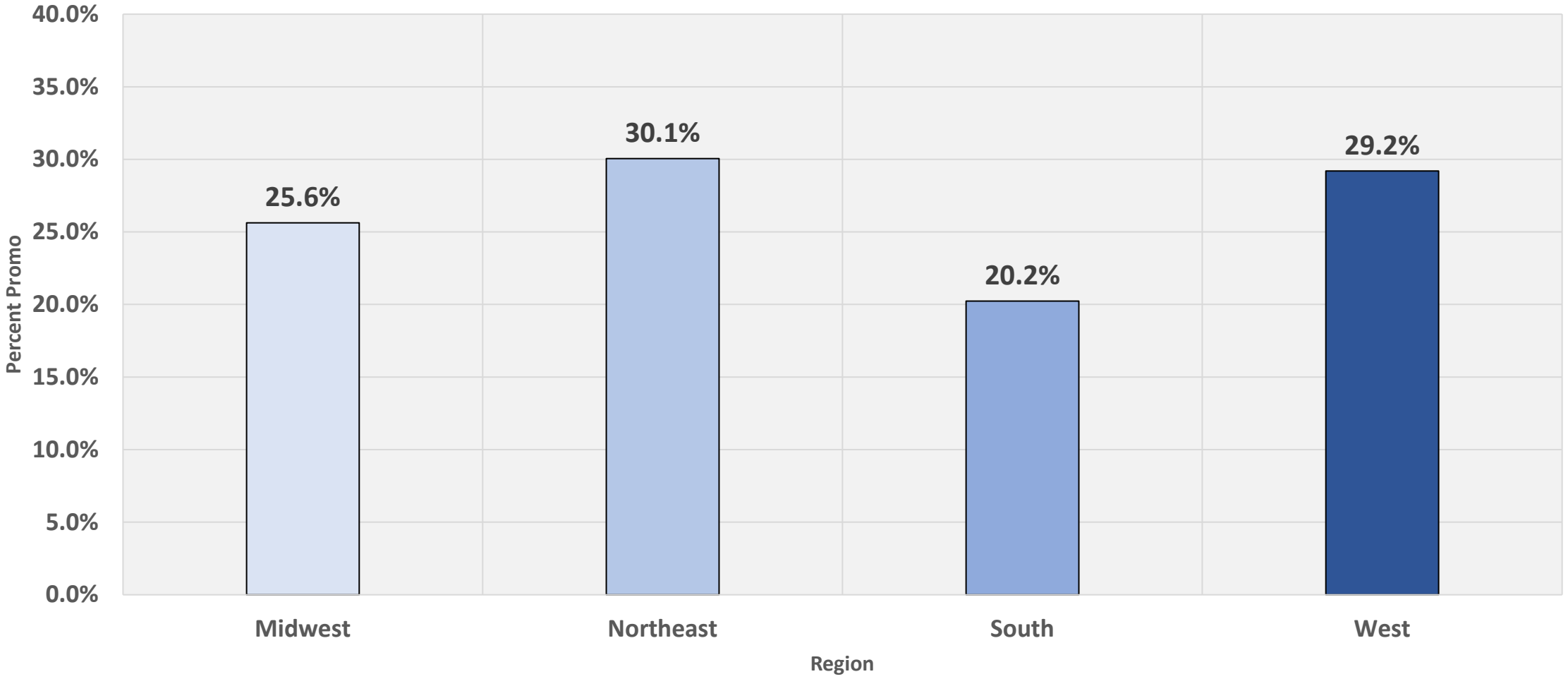
Orange Juice

Promotions by Region

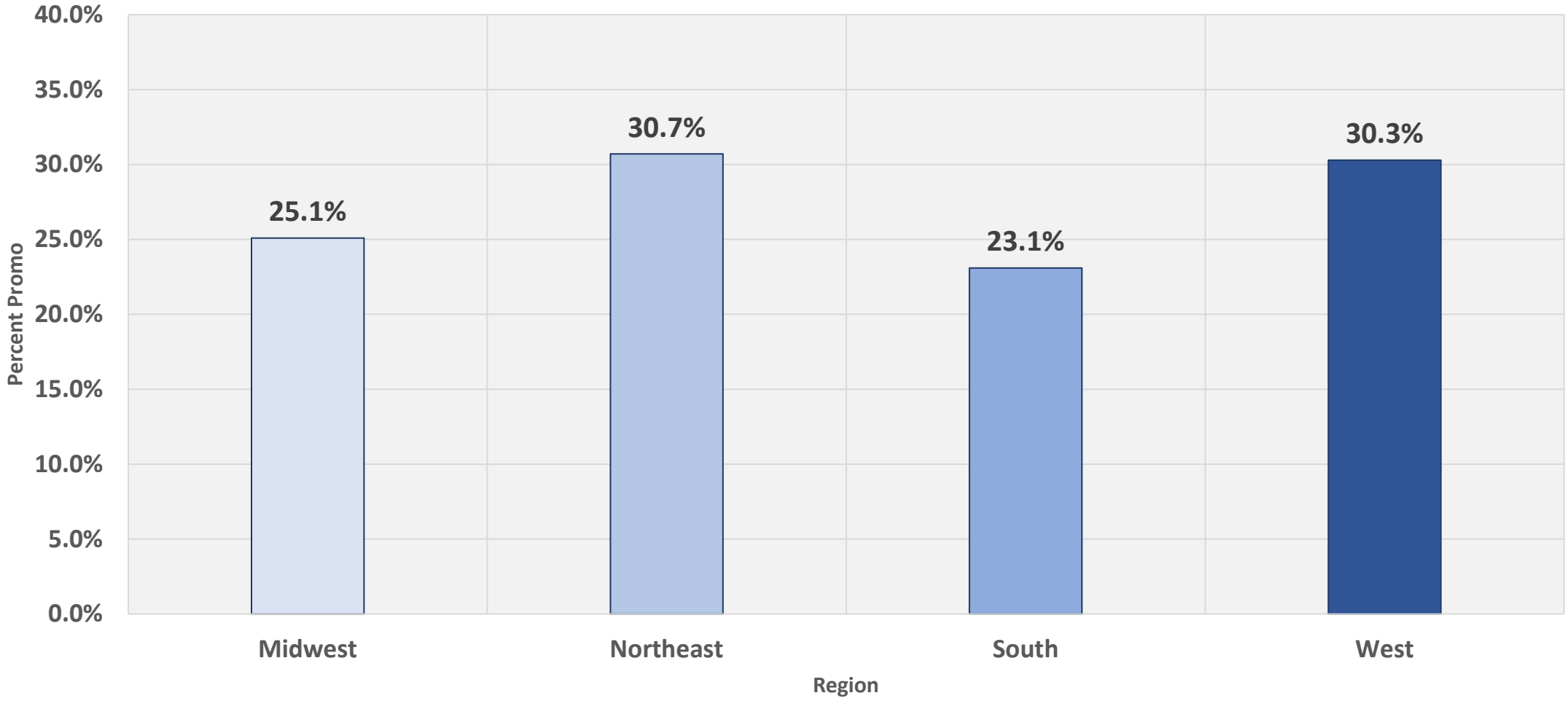
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FLORIDA DEPARTMENT OF CITRUS

Pct of TL OJ Sold on Promotion by Region – 4 Week Period ending 10/03/26 (xAOC)



Pct of NFC OJ Sold on Promotion by Region – 4 Week Period ending 10/03/26 (xAOC)



Total xAOC Gallons – 4 Week Period Compare (10/03/26)

Region	Product	Fact	10/04/25	10/03/26	% Change
MIDWEST	**TL OJ**	**ANY PROMO EQU - GALLONS**	846,852	1,023,836	20.90%
MIDWEST	TL OJ	NO PROMO EQU - GALLONS	3,115,922	2,970,617	-4.66%
MIDWEST	TL OJ	TOTAL EQU - GALLONS	3,962,774	3,994,453	0.80%
NORTHEAST	**TL OJ**	**ANY PROMO EQU - GALLONS**	953,412	1,092,530	14.59%
NORTHEAST	TL OJ	NO PROMO EQU - GALLONS	2,631,481	2,542,980	-3.36%
NORTHEAST	TL OJ	TOTAL EQU - GALLONS	3,584,892	3,635,509	1.41%
SOUTH	**TL OJ**	**ANY PROMO EQU - GALLONS**	1,374,346	1,745,172	26.98%
SOUTH	TL OJ	NO PROMO EQU - GALLONS	6,942,005	6,879,653	-0.90%
SOUTH	TL OJ	TOTAL EQU - GALLONS	8,316,352	8,624,825	3.71%
WEST	**TL OJ**	**ANY PROMO EQU - GALLONS**	941,635	1,066,665	13.28%
WEST	TL OJ	NO PROMO EQU - GALLONS	2,726,806	2,586,604	-5.14%
WEST	TL OJ	TOTAL EQU - GALLONS	3,668,441	3,653,269	-0.41%
TOTAL US	**TL OJ**	**ANY PROMO EQU - GALLONS**	4,107,844	4,913,524	19.61%
TOTAL US	TL OJ	NO PROMO EQU - GALLONS	15,414,144	14,986,095	-2.78%
TOTAL US	TL OJ	TOTAL EQU - GALLONS	19,521,988	19,899,618	1.93%

NFC OJ xAOC Gallons – 4 Week Period Compare (10/03/26)

Region	Product	Fact	10/04/25	10/03/26	% Change
MIDWEST	**NFC OJ**	**ANY PROMO EQU - GALLONS**	521,715	661,311	26.76%
MIDWEST	NFC OJ	NO PROMO EQU - GALLONS	1,962,523	1,974,411	0.61%
MIDWEST	NFC OJ	TOTAL EQU - GALLONS	2,484,238	2,635,721	6.10%
NORTHEAST	**NFC OJ**	**ANY PROMO EQU - GALLONS**	732,909	869,025	18.57%
NORTHEAST	NFC OJ	NO PROMO EQU - GALLONS	1,967,951	1,961,052	-0.35%
NORTHEAST	NFC OJ	TOTAL EQU - GALLONS	2,700,860	2,830,077	4.78%
SOUTH	**NFC OJ**	**ANY PROMO EQU - GALLONS**	885,386	1,325,415	49.70%
SOUTH	NFC OJ	NO PROMO EQU - GALLONS	4,451,735	4,414,073	-0.85%
SOUTH	NFC OJ	TOTAL EQU - GALLONS	5,337,121	5,739,487	7.54%
WEST	**NFC OJ**	**ANY PROMO EQU - GALLONS**	607,655	763,795	25.70%
WEST	NFC OJ	NO PROMO EQU - GALLONS	1,851,510	1,757,748	-5.06%
WEST	NFC OJ	TOTAL EQU - GALLONS	2,459,166	2,521,543	2.54%
TOTAL US	**NFC OJ**	**ANY PROMO EQU - GALLONS**	2,747,498	3,618,537	31.70%
TOTAL US	NFC OJ	NO PROMO EQU - GALLONS	10,226,846	10,102,801	-1.21%
TOTAL US	NFC OJ	TOTAL EQU - GALLONS	12,974,344	13,721,338	5.76%

Total xAOC Gallons – S-YTD Compare (2024-25 vs 2025-26)

Region	Product	Fact	2024-25	2025-26	% Change
MIDWEST	**TL OJ**	**ANY PROMO EQU - GALLONS**	12,609,087	16,907,425	34.09%
MIDWEST	TL OJ	NO PROMO EQU - GALLONS	47,228,464	39,959,199	-15.39%
MIDWEST	TL OJ	TOTAL EQU - GALLONS	59,837,551	56,866,624	-4.96%
NORTHEAST	**TL OJ**	**ANY PROMO EQU - GALLONS**	15,236,683	16,662,955	9.36%
NORTHEAST	TL OJ	NO PROMO EQU - GALLONS	38,082,844	34,179,127	-10.25%
NORTHEAST	TL OJ	TOTAL EQU - GALLONS	53,319,528	50,842,082	-4.65%
SOUTH	**TL OJ**	**ANY PROMO EQU - GALLONS**	22,362,068	28,575,596	27.79%
SOUTH	TL OJ	NO PROMO EQU - GALLONS	100,151,821	88,792,593	-11.34%
SOUTH	TL OJ	TOTAL EQU - GALLONS	122,513,890	117,368,189	-4.20%
WEST	**TL OJ**	**ANY PROMO EQU - GALLONS**	13,057,883	15,412,836	18.03%
WEST	TL OJ	NO PROMO EQU - GALLONS	41,351,293	35,192,175	-14.89%
WEST	TL OJ	TOTAL EQU - GALLONS	54,409,177	50,605,011	-6.99%
TOTAL US	**TL OJ**	**ANY PROMO EQU - GALLONS**	62,806,619	77,295,017	23.07%
TOTAL US	TL OJ	NO PROMO EQU - GALLONS	227,148,765	198,262,838	-12.72%
TOTAL US	TL OJ	TOTAL EQU - GALLONS	289,955,384	275,557,855	-4.97%

NFC OJ xAOC Gallons – S-YTD Compare (2024-25 vs 2025-26)

Region	Product	Fact	2024-25	2025-26	% Change
MIDWEST	**NFC OJ**	**ANY PROMO EQU - GALLONS**	8,209,709	11,199,494	36.42%
MIDWEST	NFC OJ	NO PROMO EQU - GALLONS	28,777,490	26,174,906	-9.04%
MIDWEST	NFC OJ	TOTAL EQU - GALLONS	36,987,199	37,374,400	1.05%
NORTHEAST	**NFC OJ**	**ANY PROMO EQU - GALLONS**	11,667,962	13,071,916	12.03%
NORTHEAST	NFC OJ	NO PROMO EQU - GALLONS	28,443,580	26,026,591	-8.50%
NORTHEAST	NFC OJ	TOTAL EQU - GALLONS	40,111,542	39,098,507	-2.53%
SOUTH	**NFC OJ**	**ANY PROMO EQU - GALLONS**	14,874,394	19,489,854	31.03%
SOUTH	NFC OJ	NO PROMO EQU - GALLONS	65,023,962	58,153,606	-10.57%
SOUTH	NFC OJ	TOTAL EQU - GALLONS	79,898,356	77,643,460	-2.82%
WEST	**NFC OJ**	**ANY PROMO EQU - GALLONS**	8,456,385	10,392,192	22.89%
WEST	NFC OJ	NO PROMO EQU - GALLONS	26,953,167	24,279,815	-9.92%
WEST	NFC OJ	TOTAL EQU - GALLONS	35,409,552	34,672,007	-2.08%
TOTAL US	**NFC OJ**	**ANY PROMO EQU - GALLONS**	42,872,034	54,069,792	26.12%
TOTAL US	NFC OJ	NO PROMO EQU - GALLONS	149,451,985	134,638,625	-9.91%
TOTAL US	NFC OJ	TOTAL EQU - GALLONS	192,324,019	188,708,416	-1.88%

Percent Sold on Promotion (Gallons) - 4 weeks ending 10/03/26

Channel	Market	Product	Pct Sold on Promo (Oct 03, 2026)
XAOC	**MIDWEST**	**TL OJ**	25.6%
XAOC	MIDWEST	OJ REF NFC	25.1%
XAOC	MIDWEST	OJ REF NFC 40-70 OZ	29.5%
XAOC	MIDWEST	OJ REF NFC 70 OZ-110 OZ	13.4%
XAOC	MIDWEST	OJ REF RECON	29.0%
XAOC	MIDWEST	OJ REF RECON 40-70 OZ	30.7%
XAOC	MIDWEST	OJ REF RECON 110 + OZ	53.0%
XAOC	**NORTHEAST**	**TL OJ**	30.1%
XAOC	NORTHEAST	OJ REF NFC	30.7%
XAOC	NORTHEAST	OJ REF NFC 40-70 OZ	36.9%
XAOC	NORTHEAST	OJ REF NFC 70 OZ-110 OZ	15.5%
XAOC	NORTHEAST	OJ REF RECON	30.2%
XAOC	NORTHEAST	OJ REF RECON 40-70 OZ	33.9%
XAOC	NORTHEAST	OJ REF RECON 110 + OZ	15.4%

Channel	Market	Product	Pct Sold on Promo (Oct 03, 2026)
XAOC	**SOUTH**	**TL OJ**	20.2%
XAOC	SOUTH	OJ REF NFC	23.1%
XAOC	SOUTH	OJ REF NFC 40-70 OZ	28.5%
XAOC	SOUTH	OJ REF NFC 70 OZ-110 OZ	11.6%
XAOC	SOUTH	OJ REF RECON	16.1%
XAOC	SOUTH	OJ REF RECON 40-70 OZ	20.1%
XAOC	SOUTH	OJ REF RECON 110 + OZ	14.9%
XAOC	**WEST**	**TL OJ**	29.2%
XAOC	WEST	OJ REF NFC	30.3%
XAOC	WEST	OJ REF NFC 40-70 OZ	36.9%
XAOC	WEST	OJ REF NFC 70 OZ-110 OZ	17.2%
XAOC	WEST	OJ REF RECON	29.4%
XAOC	WEST	OJ REF RECON 40-70 OZ	28.1%
XAOC	WEST	OJ REF RECON 110 + OZ	54.7%

* Items highlighted gold when over 40%.

Percent Sold on Promotion (Gallons) - S-YTD ending 10/03/26

Channel	Market	Product	Pct Sold on Promo (S-YTD 25-26)
XAOC	**MIDWEST**	**TL OJ**	29.7%
XAOC	MIDWEST	OJ REF NFC	30.0%
XAOC	MIDWEST	OJ REF NFC 40-70 OZ	39.0%
XAOC	MIDWEST	OJ REF NFC 70 OZ-110 OZ	9.1%
XAOC	MIDWEST	OJ REF RECON	32.1%
XAOC	MIDWEST	OJ REF RECON 40-70 OZ	31.8%
XAOC	MIDWEST	OJ REF RECON 110 + OZ	32.0%
XAOC	**NORTHEAST**	**TL OJ**	32.8%
XAOC	NORTHEAST	OJ REF NFC	33.4%
XAOC	NORTHEAST	OJ REF NFC 40-70 OZ	41.3%
XAOC	NORTHEAST	OJ REF NFC 70 OZ-110 OZ	13.0%
XAOC	NORTHEAST	OJ REF RECON	33.4%
XAOC	NORTHEAST	OJ REF RECON 40-70 OZ	38.8%
XAOC	NORTHEAST	OJ REF RECON 110 + OZ	11.2%

Channel	Market	Product	Pct Sold on Promo (S-YTD 25-26)
XAOC	**SOUTH**	**TL OJ**	24.3%
XAOC	SOUTH	OJ REF NFC	25.1%
XAOC	SOUTH	OJ REF NFC 40-70 OZ	32.9%
XAOC	SOUTH	OJ REF NFC 70 OZ-110 OZ	8.7%
XAOC	SOUTH	OJ REF RECON	25.7%
XAOC	SOUTH	OJ REF RECON 40-70 OZ	27.6%
XAOC	SOUTH	OJ REF RECON 110 + OZ	18.0%
XAOC	**WEST**	**TL OJ**	30.5%
XAOC	WEST	OJ REF NFC	30.0%
XAOC	WEST	OJ REF NFC 40-70 OZ	39.1%
XAOC	WEST	OJ REF NFC 70 OZ-110 OZ	10.4%
XAOC	WEST	OJ REF RECON	35.1%
XAOC	WEST	OJ REF RECON 40-70 OZ	34.4%
XAOC	WEST	OJ REF RECON 110 + OZ	47.4%

* Items highlighted gold when over 40%.

Percent Sold on Promotion (difference from U.S. Avg.) – 4-weeks ending 10/03/26

Channel	Market	Product	Diff from Total US (Oct 03, 2026)
XAOC	MIDWEST	TL OJ	0.9%
XAOC	MIDWEST	OJ REF NFC	-1.3%
XAOC	MIDWEST	OJ REF NFC 40-70 OZ	-2.5%
XAOC	MIDWEST	OJ REF NFC 70 OZ-110 OZ	-0.2%
XAOC	MIDWEST	OJ REF RECON	5.9%
XAOC	MIDWEST	OJ REF RECON 40-70 OZ	4.9%
XAOC	MIDWEST	OJ REF RECON 110 + OZ	24.9%
XAOC	NORTHEAST	TL OJ	5.4%
XAOC	NORTHEAST	OJ REF NFC	4.3%
XAOC	NORTHEAST	OJ REF NFC 40-70 OZ	4.9%
XAOC	NORTHEAST	OJ REF NFC 70 OZ-110 OZ	1.8%
XAOC	NORTHEAST	OJ REF RECON	7.2%
XAOC	NORTHEAST	OJ REF RECON 40-70 OZ	8.0%
XAOC	NORTHEAST	OJ REF RECON 110 + OZ	-12.7%

Channel	Market	Product	Diff from Total US (Oct 03, 2026)
XAOC	SOUTH	TL OJ	-4.5%
XAOC	SOUTH	OJ REF NFC	-3.3%
XAOC	SOUTH	OJ REF NFC 40-70 OZ	-3.5%
XAOC	SOUTH	OJ REF NFC 70 OZ-110 OZ	-2.1%
XAOC	SOUTH	OJ REF RECON	-7.0%
XAOC	SOUTH	OJ REF RECON 40-70 OZ	-5.7%
XAOC	SOUTH	OJ REF RECON 110 + OZ	-13.2%
XAOC	WEST	TL OJ	4.5%
XAOC	WEST	OJ REF NFC	3.9%
XAOC	WEST	OJ REF NFC 40-70 OZ	4.9%
XAOC	WEST	OJ REF NFC 70 OZ-110 OZ	3.5%
XAOC	WEST	OJ REF RECON	6.3%
XAOC	WEST	OJ REF RECON 40-70 OZ	2.2%
XAOC	WEST	OJ REF RECON 110 + OZ	26.7%

* Items highlighted in yellow are in highest quartile.
Items highlighted in blue are in lowest quartile.

Percent Sold on Promotion (difference from U.S. Avg.) – S-YTD ending 10/03/26

Channel	Market	Product	Diff from Total US (S-YTD 25-26)
XAOC	MIDWEST	TL OJ	1.7%
XAOC	MIDWEST	OJ REF NFC	1.3%
XAOC	MIDWEST	OJ REF NFC 40-70 OZ	2.0%
XAOC	MIDWEST	OJ REF NFC 70 OZ-110 OZ	-0.7%
XAOC	MIDWEST	OJ REF RECON	2.4%
XAOC	MIDWEST	OJ REF RECON 40-70 OZ	0.5%
XAOC	MIDWEST	OJ REF RECON 110 + OZ	7.9%
XAOC	NORTHEAST	TL OJ	4.7%
XAOC	NORTHEAST	OJ REF NFC	4.8%
XAOC	NORTHEAST	OJ REF NFC 40-70 OZ	4.3%
XAOC	NORTHEAST	OJ REF NFC 70 OZ-110 OZ	3.2%
XAOC	NORTHEAST	OJ REF RECON	3.6%
XAOC	NORTHEAST	OJ REF RECON 40-70 OZ	7.4%
XAOC	NORTHEAST	OJ REF RECON 110 + OZ	-12.9%

Channel	Market	Product	Diff from Total US (S-YTD 25-26)
XAOC	SOUTH	TL OJ	-3.7%
XAOC	SOUTH	OJ REF NFC	-3.6%
XAOC	SOUTH	OJ REF NFC 40-70 OZ	-4.1%
XAOC	SOUTH	OJ REF NFC 70 OZ-110 OZ	-1.1%
XAOC	SOUTH	OJ REF RECON	-4.0%
XAOC	SOUTH	OJ REF RECON 40-70 OZ	-3.8%
XAOC	SOUTH	OJ REF RECON 110 + OZ	-6.1%
XAOC	WEST	TL OJ	2.4%
XAOC	WEST	OJ REF NFC	1.3%
XAOC	WEST	OJ REF NFC 40-70 OZ	2.2%
XAOC	WEST	OJ REF NFC 70 OZ-110 OZ	0.7%
XAOC	WEST	OJ REF RECON	5.4%
XAOC	WEST	OJ REF RECON 40-70 OZ	3.1%
XAOC	WEST	OJ REF RECON 110 + OZ	23.2%

* Items highlighted in yellow are in highest quartile.
Items highlighted in blue are in lowest quartile.

Orange Juice

Promotions by Promotional Type

Florida Citrus™

FLORIDA DEPARTMENT OF CITRUS

Types of Promotions

- **ANY FEATURE W/O DISPLAY**
  - Features are print ads and coupons from retailers. Does not include coupons from manufacturers. Mostly newspaper inserts and in-store circulars. Can also include coupon books. May or may not have price reduction.

- **ANY DISPLAY W/O FEATURE**
  - Displays must be set in a secondary selling location and contain product that consumers can pick up and purchase. A display must be temporary for Nielsen to recognize as a display. May or may not have price reduction.

- **ANY FEATURE AND DISPLAY**
  - A promotion that combines elements of features and displays.

- **ANY PRICE DECREASE**
  - Price decreases must be over five percent lower than regular price. If the lower price persists over thirteen consecutive weeks, Nielsen will consider the reduced price the new regular price, and it will no longer be counted as a promotion. Counts any price decreases (including features and displays).

Percent Distribution of Promotions by Product

Promo Type	NFC OJ	Recon OJ	REF OJ
NO PROMO	71.3%	70.3%	71.0%
ANY PROMO ↓↓	28.7%	29.7%	29.0%
- ANY FEATURE W/O DISPLAY	10.3%	5.2%	8.8%
- ANY DISPLAY W/O FEATURE	2.4%	1.0%	2.0%
- ANY FEATURE AND DISPLAY	0.6%	0.2%	0.5%
- ANY PRICE DECREASE	26.1%	28.3%	26.7%

Note: Sum of Promo types (in blue) may be greater than Any Promo percentage due to multiple promo types being applicable simultaneously.

NFC OJ Gallons Sold on Promotion (S-YTD 2025-26)

	NO PROMO GALLONS		ANY PROMO GALLONS		ANY FEAT W/O DISP GALLONS		ANY DISP W/O FEAT GALLONS		ANY FEAT AND DISP GALLONS		PRICE DECR GALLONS	
Size	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**
NFC OJ <11 OZ	3,021,596	3,041,376	284,884	231,139	38,509	19,109	12,026	11,997	50	130	267,951	218,913
NFC OJ 11-20 OZ	3,059,975	3,215,730	999,272	1,126,059	228,747	159,408	42,468	74,974	24,287	6,193	946,990	1,058,845
NFC OJ 20-40 OZ	1,454,176	1,165,810	517,677	201,344	96,911	20,164	5,583	11,470	3,009	82	509,713	187,430
NFC OJ 40-70 OZ	92,303,680	79,297,973	36,729,396	46,479,422	15,701,882	18,226,559	3,714,683	3,878,481	1,168,694	1,042,868	31,239,049	42,327,757
NFC OJ 70OZ-110 OZ	42,419,024	41,507,743	2,819,504	4,493,874	534,953	776,973	296,742	325,162	15,540	23,899	2,286,372	4,099,734
NFC OJ 110 + OZ	7,193,535	6,409,992	1,521,301	1,537,954	849,076	203,010	46,349	190,157	14,892	16,922	1,339,122	1,417,488
NFC OJ TOTAL	**149,451,985**	**134,638,625**	**42,872,034**	**54,069,792**	**17,450,078**	**19,405,224**	**4,117,852**	**4,492,241**	**1,226,471**	**1,090,094**	**36,589,197**	**49,310,167**

Recon OJ Gallons Sold on Promotion (S-YTD 2025-26)

	NO PROMO GALLONS		ANY PROMO GALLONS		ANY FEAT W/O DISP GALLONS		ANY DISP W/O FEAT GALLONS		ANY FEAT AND DISP GALLONS		PRICE DECR GALLONS	
Size	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**
RECON OJ <11 OZ	61,258	19,776	1,941	2,272	82	0	245	8	0	0	1,696	2,264
RECON OJ 11-20 OZ	538,248	457,113	84,407	48,718	9,316	4,788	11,057	5,218	170	0	67,208	43,305
RECON OJ 20-40 OZ	543,364	603,670	276,066	264,309	1,043	1,093	3,473	4,376	0	15	272,713	259,905
RECON OJ 40-70 OZ	36,318,482	28,642,293	13,429,066	13,070,838	4,258,509	3,285,892	454,096	417,969	304,522	125,397	12,519,359	12,461,785
RECON OJ 70OZ-110 OZ	13,249,074	12,597,641	2,457,033	5,568,188	298,329	337,630	119,647	148,390	15,230	16,961	2,322,952	5,423,458
RECON OJ 110 + OZ	11,701,544	9,989,980	2,281,750	3,175,314	793,435	226,778	113,560	187,099	1,407	1,041	1,487,444	2,862,544
RECON OJ TOTAL	**62,411,971**	**52,310,472**	**18,530,262**	**22,129,640**	**5,360,714**	**3,856,181**	**702,078**	**763,059**	**321,329**	**143,414**	**16,671,371**	**21,053,262**

Total REF OJ Gallons Sold on Promotion (S-YTD 2025-26; NFC + Recon)

	NO PROMO GALLONS		ANY PROMO GALLONS		ANY FEAT W/O DISP GALLONS		ANY DISP W/O FEAT GALLONS		ANY FEAT AND DISP GALLONS		PRICE DECR GALLONS	
Size	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**	**2024-25**	**2025-26**
REF OJ <11 OZ	3,082,853	3,061,152	286,825	233,411	38,591	19,109	12,271	12,005	50	130	269,647	221,177
REF OJ 11-20 OZ	3,598,223	3,672,843	1,083,679	1,174,777	238,063	164,197	53,525	80,191	24,457	6,193	1,014,197	1,102,150
REF OJ 20-40 OZ	1,997,540	1,769,481	793,743	465,653	97,954	21,256	9,056	15,846	3,009	97	782,426	447,335
REF OJ 40-70 OZ	128,622,162	107,940,266	50,158,462	59,550,260	19,960,391	21,512,451	4,168,780	4,296,450	1,473,215	1,168,265	43,758,408	54,789,543
REF OJ 70OZ-110 OZ	55,668,098	54,105,383	5,276,537	10,062,062	833,282	1,114,603	416,389	473,552	30,770	40,859	4,609,324	9,523,192
REF OJ 110 + OZ	18,895,079	16,399,972	3,803,051	4,713,268	1,642,511	429,788	159,909	377,256	16,298	17,963	2,826,566	4,280,032
REF OJ TOTAL	**211,863,956**	**186,949,097**	**61,402,296**	**76,199,432**	**22,810,792**	**23,261,405**	**4,819,930**	**5,255,300**	**1,547,799**	**1,233,508**	**53,260,568**	**70,363,429**

Thank You

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