Economic & Market Research Committee Report



October 2026 - Florida Citrus Commission

Agenda Item:

Florida Citrus

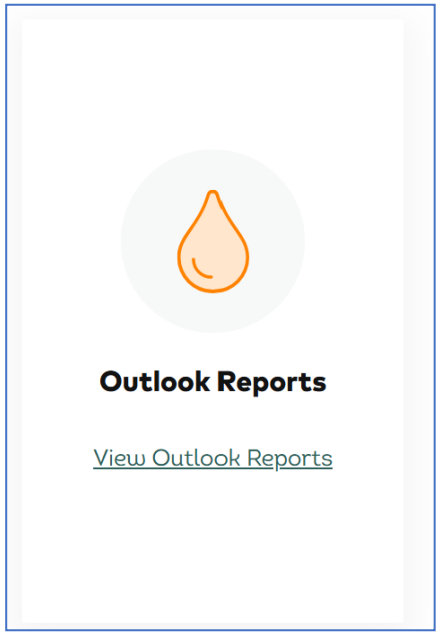
2026-27 Season Florida Citrus Outlook



Forecast Florida Citrus Outlook: 2026-27 Season

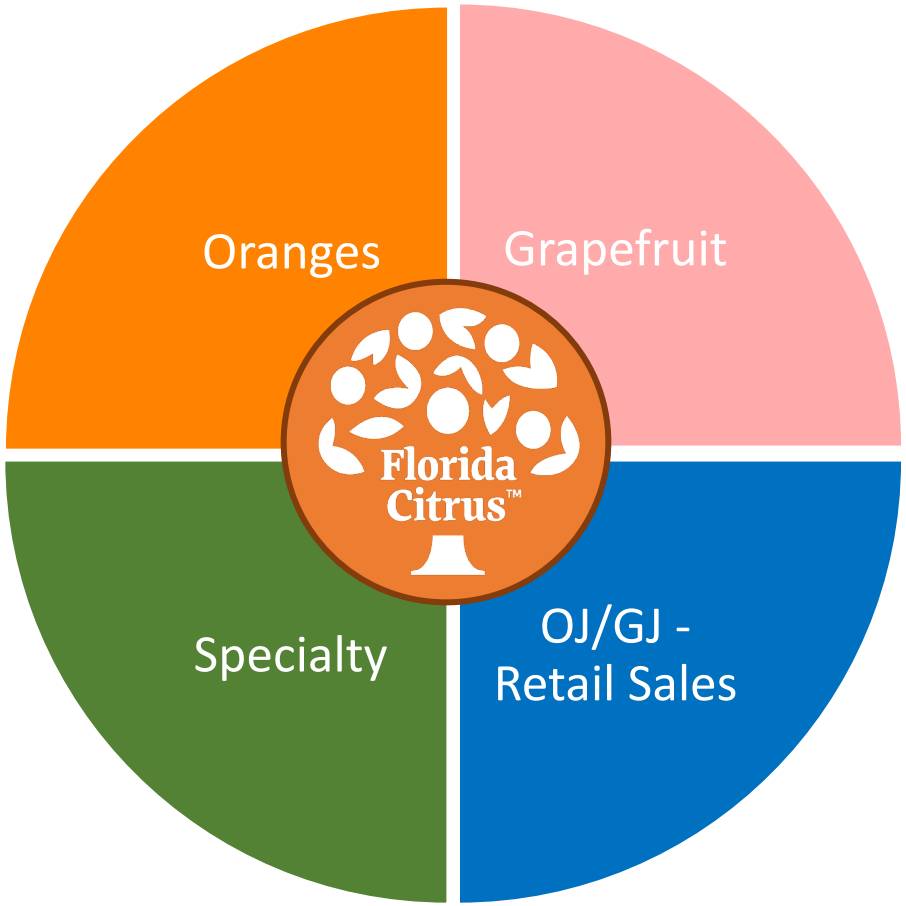
Available on-line at:

https://www.floridacitrus.org/grower/economic-market-resources/economic-reports/



Note: The *Florida Citrus Outlook* is based on the initial release of the USDA Citrus Forecast for the 2026-27 season (October 9, 2026).

Florida Citrus Outlook Report Structure



- World OJ Availability
- Florida Utilization and Movement
  - Florida Processed
  - Florida Fresh
- U.S. OJ/GJ Disappearance
- OJ/GJ - Retail Sales
- Certified Fresh Destinations

Industry in Transition: Strategies Underway for Florida Citrus Production

$164.5 million

In new state funding
$160M for field trials + $4.5M for research

3.7 million

Non-bearing commercial trees
Planted in 2023 to 2025; nearly 14% of all trees will produce under better conditions and improved yields

Existing Tree Therapies

Multi-year trials of approved treatments support mature trees. Growers from earlier rounds can extend their trials.

Cycle 8 Plantings

Grower-selected rootstock and scion combinations, with royalty reimbursement to help offset licensed-variety costs.

Research to the Grove

CRAFT and CRDF combined efforts on October 1, 2026, linking research and commercial field testing.

USDA Florida Citrus 2026-27 Forecast – October 2026

11.75

million boxes of citrus

OR, GF, SP crop: down by 21%

18.2 M

million bearing commercial trees

Non-Val trees: down 24%
Valencia trees: down 12%
Grapefruit trees held near 1.8 million.

Fruit drop improved across major varieties

Fruit drop	2025–26	2026-27	Change
Early / midseason oranges	40%	35%	−5points
Valencia oranges	46%	40%	−6 points
Red grapefruit	33%	24%	−9 points
White grapefruit	29%	23%	−6 points

** Fruit size and Harvest - Record Lows

2026-27F	FPT	Fruit per Box
Early / midseason oranges	394	340
Valencia oranges	276	280
Red grapefruit	251	123
White grapefruit	298	119

(All comparisons to non-hurricane, non-freeze seasons)

Source: Outlook, Review of the 2025–26 Florida Citrus Season. Tree and acreage figures: 2026 commercial inventory.

Florida Orange Utilization – October 2026

Segment	2022-23	2023-24	2024-25	2025-26p	2026-27f
Fresh	1.49	1.69	1.00	1.31	**0.946**
FCOJ	1.35	3.46	3.85	4.28	**3.200**
SSOJ (NFC)	12.96	12.57	7.16	7.29	**5.804**
Non-Certified	0.12	0.07	0.07	0.06	**0.050**
Other	<0.00	0.23	0.15	0.05	**0.000**
TOTAL	15.82	17.96	12.20	12.95	**10.00**

Million 90-pound boxes. p = preliminary. f = forecast. Source: Outlook Table 2.

FL Processor Juice Imports

Origin		Season-to-date October-September				Change from 3 season average
		2022-23	2023-24	2024-25	2025-26	
		million SSE Gallons				%
Brazil	**Total**	**341.3**	**277.2**	**338.7**	**347.7**	**+9.0**
	FCOJ	*86.0*	*84.4*	*153.5*	*128.0*	*+18.6*
	SSOJ (NFC)	*255.3*	*192.9*	*185.3*	*219.7*	*+4.1*
Mexico	**Total**	**79.0**	**108.0**	**74.3**	**38.8**	**-55.5**
	FCOJ	*64.5*	*100.8*	*61.2*	*25.8*	*-65.8*
	SSOJ (NFC)	*14.5*	*7.2*	*13.2*	*12.9*	*+11.2*
Other Countries	**Total**	**23.6**	**23.6**	**12.6**	**28.7**	**+43.8**
Domestic	**Total**	**10.0**	**11.9**	**14.6**	**12.8**	**+4.8**
Total		**453.8**	**420.8**	**440.2**	**427.9**	**-2.4**

Combined Florida OJ Availability, Movement, and Inventory

Million SSE gallons, except carryover in weeks; Please Note: 2025-26 is a 53-week season

Item	2024–25	2025–26p	2026–27f
Beginning inventory	165.65	194.86 →	**259.10**
Production	54.12	58.13 →	**44.08**
Imports / domestic receipts	424.84	416.76	**388.73**
Other adjustments	50.97	50.73	**37.33**
Availability	695.57	720.48	**729.24**
Movement	500.72	461.38 →	**426.93**
Ending inventory	194.86	259.10	**302.31**
Carryover (weeks)	20.8	30.6	**36.8**

64% - FCOJ

Source: Outlook Table 9, base import scenario. Other adjustments include reprocessed tangerine juice and net loss/gain.
2025-26 is a 53-week season

Combined Florida OJ Import Scenarios

Million SSE gallons, except carryover in weeks.

Item	2024–25	2025–26p	26-27f −10%	2026-27	26-27f +10%
Beginning inventory	165.65	194.86	259.10	**259.10**	259.10
Production	54.12	58.13	44.08	**44.08**	44.08
Imports	424.84	416.76	349.85	**388.73**	427.60
Other adjustments	50.97	50.73	37.33	**37.33**	37.33
Availability	695.57	720.48	690.37	**729.24**	768.11
Total movement	500.72	461.38	426.93	**426.93**	426.93
Domestic movement	485.84	447.73	426.28	**426.28**	426.28
Export movement	0.76	0.65	0.65	**0.65**	0.65
Ending inventory	194.86	259.10	263.44	**302.31**	341.18
Carryover (weeks)	20.8	30.6	32.1	**36.8**	41.6

Source: Outlook Table 9. Low and high cases vary imports by ±10% from the base case, holding other assumptions constant. 2025-26 is a 53-week season

Florida NFC OJ Availability, Movement, and Inventory

SSOJ used for NFC. Million SSE gallons, except carryover in weeks. 2025-26 is a 53-week season

Item	2024–25	2025–26p	2026–27f
Beginning inventory	93.80	73.97	92.33
Pack from fruit	34.97	35.97	28.49
Imports / domestic receipts	198.27	231.78	240.75
Recon	38.61	39.27	37.78
EVAP & Net loss / gain	(23.34)	(22.10)	(21.70)
Availability	342.31	358.90	377.65
Total movement	268.34	266.56	261.03
Ending inventory, total	73.97	92.33	116.61
Ending inventory, bulk	68.49	86.88	111.80
Carryover, total (weeks)	14.3	18.4	23.2
Carryover, bulk (weeks)	13.3	17.3	22.3

Source: Outlook Table 11. Total inventory includes packaged juice. Parentheses indicate deductions.

Florida NFC OJ Import Scenarios

Million SSE gallons, except approximate carryover in weeks.

Item	Imports −10%	26-27f	Imports +10%
Beginning inventory	92.33	**92.33**	92.33
Pack from fruit	28.49	**28.49**	28.49
Imports / domestic receipts	216.68	**240.75**	264.83
Recon	37.78	**37.78**	37.78
Net loss / gain	(21.70)	**(21.70)**	(21.70)
Availability	353.58	**377.65**	401.73
Total movement	261.03	**261.03**	261.03
Ending inventory	92.54	**116.61**	140.69
Carryover (weeks, approx.)	18.4	**23.2**	28.0

Only imports vary by ±10%. Production, Recon, net loss/gain, and movement remain constant.

Source: Table 11 baseline; alternative scenarios calculated. Total inventory includes packaged juice. Source rounding retained.

Florida FCOJ Availability, Movement, and Inventory

Million SSE gallons, except carryover in weeks. Updated 2026–27 forecast.

Item	2024–25	2025–26p	2026–27f
Beginning inventory	71.86	120.88	**166.77**
Pack from fruit	17.83	21.14 →	**15.59**
Imports / domestic receipts	226.57	184.98 →	**147.98**
Reprocessed tangerine juice	4.68	3.38	**3.08**
Evaporation from NFC	18.73	18.94	**18.95**
Net loss / gain	(0.21)	(0.97)	**(0.78)**
Availability	339.15	348.35 →	**351.59**
Total movement	218.26	181.81	**165.89**
Ending inventory	120.88	166.77	**185.70**
Carryover (weeks)	28.8	48.6	**58.2**

Source: Outlook Table 10. Imports include domestic receipts. Parentheses indicate deductions. p = preliminary; f = forecast.

U.S. OJ Supply & Domestic Use

Million SSE gallons.

Season	Beginning inventory	U.S. production	Imports	Exports	Ending inventory	Domestic use*
2022-23	234.9	110.0	567.8	32.4	203.6	676.7
2023-24	203.6	145.2	553.7	35.9	186.9	679.6
2024-25	186.9	94.9	560.6	37.1	213.7	591.6
2025-26p	213.7	125.1	539.9	29.9	278.9	569.9
2026-27f	278.9	105.2	501.6	29.5	297.5	558.7

* Disappearance, used as a consumption proxy. Source: Outlook Table 12.

Nielsen Retail Orange Juice Sales



Average price ($ per SSE gallon)

Season	NFC	RECON	FCOJ	Other	Total
2020–21	$8.81	$4.86	$5.13	$7.62	**$7.37**
2021–22	$9.48	$5.31	$5.33	$8.21	**$7.91**
2022–23	$10.35	$6.82	$5.99	$9.16	**$8.81**
2023–24	$10.46	$7.96	$7.55	$9.86	**$9.58**
2024–25	$11.92	$9.38	$8.47	$11.02	**$11.07**
2025–26p	$12.90	$9.44	$8.53	$12.31	**$11.83**
2026–27 High	$13.97	$10.09	$8.93	$13.08	**$12.82**
2026–27 Mid	**$12.92**	**$9.40**	**$8.55**	**$12.57**	**$11.89**
2026–27 Low	$12.90	$9.31	$8.24	$12.07	**$11.83**

Volume (million SSE gallons)

Season	NFC	RECON	FCOJ	Other	Total
2020–21	260.25	137.52	15.10	14.75	**427.62**
2021–22	244.50	134.98	14.73	13.32	**407.53**
2022–23	196.37	135.94	13.32	11.75	**357.38**
2023–24	201.09	97.34	10.94	8.90	**318.27**
2024–25	189.91	81.05	9.70	6.90	**287.56**
2025–26p	188.71	74.44	8.03	4.38	**275.56**
2026–27 High	177.3	65.3	6.9	4.0	**253.5**
2026–27 at Mid Price	**184.7**	**68.0**	**7.2**	**4.2**	**264.1**
2026–27 Low	192.0	70.7	7.5	4.4	**274.6**

Source: Nielsen Answers on Demand, Expanded All Outlets Combined; FDOC Custom database. Outlook Table 14.

Florida Grapefruit Utilization – October 2026

Item	2023–24	2024–25	2025–26p	2026–27f
Certified fresh	1.171	0.872	0.780	0.826
FCGJ	-	0.002	-	-
SSGJ (NFC)	0.585	0.375	0.519	0.443
Non-Certified	0.030	0.017	0.031	0.030
Other	0.004	0.034	0.020	<0.000
TOTAL	1.790	1.300	1.350	1.300

Million boxes. Source: Outlook Table 17. Figures may differ slightly due to rounding.

U.S. GJ Supply & Domestic Use

Season	Beginning inventory	U.S. production	Imports	Exports	Ending inventory	Domestic use*
2022-23	15.3	14.3	8.6	3.6	10.5	24.0
2023-24	10.5	15.7	7.6	4.4	8.9	20.4
2024-25	8.89	12.06	5.66	4.03	6.07	16.50
2025-26p	6.07	14.97	5.09	3.87	6.72	15.54
2026-27f	6.72	15.76	4.68	3.50	8.00	15.65

Million SSE gallons. Domestic use = disappearance. Source: Outlook Table 19.

Nielsen Retail Grapefruit Juice Sales



Average price ($ per SSE gallon)

Season	Refrig. NFC	Refrig. RECON	Shelf stable	FCGJ / other	Total
2020–21	$9.49	$19.12	$7.73	$5.13	**$9.03**
2021–22	$10.01	$19.97	$8.71	$5.33	**$9.73**
2022–23	$10.60	$21.95	$9.05	$5.99	**$10.32**
2023–24	$11.21	$24.30	$9.00	$7.55	**$10.82**
2024–25	$12.65	$23.44	$9.28	$8.47	**$11.91**
2025–26p	$13.05	$23.58	$9.28	$7.48	**$12.19**
2026–27 High	$13.72	$25.13	$10.07	$8.60	**$13.12**
2026–27 Mid	**$13.19**	**$24.16**	**$9.69**	**$8.27**	**$12.53**
2026–27 Low	$12.35	$23.78	$9.33	$8.11	**$11.05**

Volume (million SSE gallons)

Season	Refrig. NFC	Refrig. RECON	Shelf stable	FCGJ / other	Total
2020–21	8.47	0.18	2.97	0.42	**12.04**
2021–22	8.21	0.20	2.54	0.46	**11.41**
2022–23	7.43	0.18	2.77	0.31	**10.70**
2023–24	6.96	0.18	2.83	0.02	**9.99**
2024–25	6.33	0.22	2.71	0.01	**9.27**
2025–26p	5.54	0.30	2.74	0.04	**8.62**
2026–27 High	5.13	0.30	2.14	0.04	**7.61**
2026–27 Mid	**5.24**	**0.30**	**2.19**	**0.04**	**7.81**
2026–27 Low	5.29	0.31	2.21	0.04	**8.47**

Table 20: historical sales and 2026–27 forecast price scenarios

Source: Nielsen Answers on Demand, Expanded All Outlets Combined; FDOC Custom database. Outlook Table 20.

Specialty Tangerine Citrus



Season	Fresh*	Processed	Total
2022-23	0.335	0.145	0.480
2023-24	0.329	0.121	0.450
2024-25	0.243	0.157	0.400
2025-26p	0.301	0.159	0.460
2026-27f	0.300	0.149	0.450

*** Million boxes. Fresh includes certified and non-certified shipments.**

Florida Certified Fresh Citrus Shipments



Florida Certified Fresh Oranges

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

Season	Exports (1.3%)		Domestic (98.7%)				Total	
	Overseas	Canada	South	Northeast	Central	West		90-lb
	Millions 4/5 Bushel Cartons							Boxes
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**	**1.306**
2026-27f	0.010	0.015	0.835	0.548	0.424	0.061	**1.892**	**0.946**

Florida Certified Fresh Grapefruit

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

Season	Exports (4.5%)		Domestic (95.5%)				Total	
	Overseas	Canada	South	Northeast	Central	West		85-lb
	Millions 4/5 Bushel Cartons							Boxes
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**
2026-27f	0.023	0.040	0.898	0.520	0.135	0.037	**1.653**	**0.826**

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
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**
2026-27f	0.001	0.004	0.332	0.125	0.034	0.063	**0.559**	**0.279**

Looking Ahead

Future Production

- Florida Production is undergoing a transition period.

Fresh Markets

- Fruit quality, reliable shipments, and strong retailer and customer engagement will help sustain domestic and export markets.

Juice Markets

- Maintaining processing capacity and strengthening consumer demand will support a market for future production.

3.7 million

Non-bearing commercial trees
Planted in 2023 to 2025; nearly 14% of all trees will produce under better conditions and improved yields



Thank you

