Florida Citrus Outlook 2026-27 Season

Prepared by:
Marisa L. Zansler, Ph.D.
Economic and Market Research Department
Florida Department of Citrus
Gainesville, Florida

For release to:
Florida Citrus Commission
Economic and Market Research Committee

October 28, 2026

Report no. EMRD-Outlook-2026/27-1

EMRD Working Papers are generally speeches and research reports to the Florida Citrus Commission and other industry organizations. The content focuses on research results and industry implications. Technical details of the analytical models are presented in other professional and EMRD publication outlets.

EMRD wishes to acknowledge industry leaders and stakeholders for providing useful insight and guidance into the key components of this report.

ECONOMIC AND MARKET RESEARCH DEPARTMENT

FLORIDA DEPARTMENT OF CITRUS

Web Site: www.FloridaCitrus.org/grower/

Bartow Office: 605 East Main Street
P.O. Box 9010
Bartow, Florida 33831-9010 USA

Gainesville Office: 2125 McCarty Hall
P.O. Box 110249
University of Florida
Gainesville, Florida 32611-0249 USA

Telephone: 352-294-7691
E-Mail: mzansler@ufl.edu

Table of Contents

Introduction 3
Review of the 2025-26 Florida Citrus Season 4
Florida Orange Crop, Utilization and Movement 7
- Florida 8
- São Paulo 10
- Mexico 10
- Other U.S. Orange Production 12
- Orange Juice Production and Availability 13
- Florida Orange Juice Inventory and Movement 15
- U.S. Orange Juice Supply, Disappearance and Retail Sales 18
- Florida Fresh Orange Shipments, by Market 22

Florida Grapefruit Crop, Utilization and Movement 23
- Florida Grapefruit Juice Inventory and Movement 24
- U.S. Grapefruit Juice Supply, Disappearance, and Retail Sales 25
- Fresh Grapefruit Shipments, by Market 28

Florida Specialty Crop and Utilization 29
Summary: Implications for the Florida Grower 30
References 33
TABLES 34

List of Tables

Table 1. Utilization of world oranges – Selected Countries. 35
Table 2. Utilization of Florida round oranges. 36
Table 3. Comparative utilization of round oranges, Florida, São Paulo, and Mexico. 37
Table 4. Comparative orange juice yields, Florida, Brazil, and Mexico. 38
Table 5. Comparative orange juice production, Florida, São Paulo, and Mexico. 39
Table 6. Total Florida, Brazil, and Mexico OJ availability 40
Table 7. Brazil orange juice exports to select regions. 41
Table 8. U.S. Imports orange juice, by origin and type. 42
Table 9. Total Florida forecasted OJ availability, movement, and carryover for 2026-27 and actual for 2024-25 and 2025-26. 43
Table 10. Florida FCOJ forecasted availability, movement, and carryover for 2026-27 and actual for 2024-25 and 2025-26. 44
Table 11. Florida SSOJ forecasted availability, movement, and carryover for 2026-27 and actual for 2024-25 and 2025-26 45
Table 12. U.S. orange juice supply and disappearance. 46
Table 13. Florida processor OJ receipts, movement, and inventory, by type. 47
Table 14. Retail orange juice sales. 48
Table 15. Share of 100% orange juice sold on promotion with reported price, by type 49
Table 16. Destination markets for Florida certified fresh orange shipments. 50
Table 17. Utilization of Florida grapefruit. 51
Table 18. Florida FCGJ and SSGF availability, movement, and carryover for 2026-27, and actual for 2023-24 through 2025-26. 52
Table 19. U.S. grapefruit juice production, supply, and disappearance. 53
Table 20. Retail grapefruit juice sales. 54
Table 21. Share of 100% grapefruit juice sold on promotion with reported price, by type. 55
Table 22. Destination markets for Florida certified fresh grapefruit. 56
Table 23. Utilization of Florida fresh specialty. 57
Table 24. Destination markets for Florida certified fresh specialty shipments. 58

Florida Citrus Outlook
2026-27 Season

Introduction

This report provides supply and demand projections for Florida citrus during the 2026-27 season. On Friday, October 09, 2026, the USDA's National Agricultural Statistics Service (USDA/NASS) released the 2026-27 Citrus Production Forecast for the Florida citrus crop, by variety, which provides the baseline for these projections. This report examines the utilization of oranges, grapefruit, and specialty citrus, in accordance with industry trends. Projections include certified fresh utilization and shipment destinations, Florida orange juice (OJ) and grapefruit juice (GJ) pack, movement, and ending inventory, along with estimates of U.S. consumption and retail sales of OJ and GJ. World OJ availability is presented, given its strong bearing on Florida's OJ situation. Sensitivity analyses are provided to assess alternative scenarios for availability and movement, where appropriate.

The October citrus forecast for the 2026-27 Florida citrus season is 11.75 million boxes, an estimated 20.4% decline in total Florida citrus production of oranges, grapefruit, and tangerines. The forecast for total U.S. citrus production for the 2026-27 season indicates production will increase overall by 1.5% with a total of 132.45 million boxes of oranges, grapefruit, lemons, and specialty citrus from California, Florida, Texas, and Arizona. Specifically, the October forecast projects 61.70 million boxes of oranges, 8.50 million boxes of grapefruit, and 32.45 million boxes of specialty tangerines and tangelos. The USDA forecast also anticipates that California, Florida, and Arizona will produce 29.80 million boxes of lemons in the 2026-27 season.

The projections contained in this report rely on assumptions based on recent industry trends

in production components, as well as trends in supply and demand for citrus products. Even a modest variation in these trends could substantially change forecast projections.[1]

Review of the 2025-26 Florida Citrus Season

This section provides an overview of trends from the 2025-26 season that may impact the outlook for the 2026-27 season. The preliminary production projection for the 2025-26 Florida citrus season was 14.76 million boxes of Florida oranges, grapefruit, and tangerines, an estimated 6% increase in total citrus production compared to production in the 2024-25 season.

The USDA/NASS preliminary estimate for the Florida round orange crop in the 2025-26 season, released on August 29, 2026, was 12.95 million boxes, an increase of 6.1%, or equivalent to 0.8 million boxes compared to last season's crop of 12.2 million boxes. The fruit drop rate for early-midseason oranges was 40%, compared to a 56% drop rate during the 2024-25 season. The drop rate for Valencia oranges was 46%, compared to 52% the previous season. Trends in utilization reveal a higher share of the orange crop utilized on the fresh market. Certified fresh orange utilization is projected to account for approximately 10.1% of total orange production during the 2025-26 season. Certified fresh orange shipments in 2025-26 are estimated at 1.31 million boxes (equivalent to 2.61 million cartons), which would be an increase of 30.8% from the 1.00 million boxes (equivalent to 2.00 million cartons) shipped last season.

Domestic fresh orange shipments are projected at 2.59 million cartons, up by 623,799 cartons. The domestic share is projected to be about 99% of all Florida fresh orange shipments in 2025-26. Florida packers are projected to export 25,119 cartons of fresh oranges during the 2025-

[1] USDA National Agricultural Statistics Service, Florida Field Office. "Citrus Production January Forecast" https://www.nass.usda.gov/Statistics_by_State/Florida/Publications/Citrus/; Net pounds per box: oranges in California-80, Florida-90, Texas-85; grapefruit in California and Texas-80, Florida-85; lemons-80; tangerines and mandarins in California-80, Florida-95.

26 season, representing a decline of 24.9% compared to last season. Accounting for 43% of all exports, Canada was the leading destination of Florida fresh oranges.

Approximately 89.8% of Florida's orange production was utilized in the processed market. The number of round orange boxes directly used for single-strength orange juice (SSOJ), which is used to make not-from-concentrate (NFC) orange juice, is estimated at 7.29 million boxes (or 63% of total processed utilization) in the 2025-26 season, an increase of 0.13 million boxes from last season. The quantity of orange boxes used in 2025-26 to produce FCOJ is estimated at 4.28 million boxes, an increase of 0.43 million boxes compared to last season's utilization of 3.85 million boxes.

The preliminary September estimate of the Florida grapefruit crop in 2025-26 is 1.35 million boxes, an increase of 3.8%. The fruit drop rate for red grapefruit was 33%, compared to a 43% drop rate during the 2024-25 season. The drop rate for white grapefruit was 29%, compared to 51% the previous season. Approximately 38% of Florida's certified grapefruit was utilized on the processed market, a slightly higher share compared to last season. Processed utilization is projected is estimated at 518,695 boxes, all used to make NFC GJ, up by 37.5% compared to the 2024-25 season. Certified fresh grapefruit shipments are estimated to be 779,590 boxes in 2025-26, which would represent a decline of about 11% compared to certified fresh utilization last season.

The 2025-26 Florida specialty citrus crop is forecast at 460,000 boxes, up 60,000 from last year. Certified fresh shipments are expected to represent 61% of production, totaling nearly 280,000 boxes, primarily for the domestic market.

The latest USDA/NASS Commercial Citrus Inventory, published on August 29, 2026, helps to explain the season's opening forecast of 11.75 million boxes of oranges grapefruit, and specialty. Florida now has 165,359 acres of commercial citrus, down 21% from the year before.

That is a net loss of 42,827 acres, with only about 5,200 acres being newly planted. Oranges account for 143,650 acres, down 22%, and Valencia now covers about two-thirds of all orange land. Grapefruit acreage fell 10% to roughly 11,500 acres, and specialty citrus fell 11% to just over 10,000 acres.

The commercial tree count tells a similar story, but the details vary by variety. Florida has 26.7 million commercial citrus trees, down 18% from last year and down from a count of 50.3 million trees in 2023. Early and mid-season oranges were hit hardest. Hamlin trees fell 27% to about 5.6 million, and the non-Valencia group as a whole lost a similar share. Valencia trees fell 16% to just under 16 million. Specialty trees declined 14% to about 1 million trees. Yet, some indications of the benefits of replanting can be seen in the grapefruit data with the number of grapefruit trees holding steady at about 1.8 million. Red seedless trees rose about 8%, which suggests growers are planting more densely.

With fewer bearing trees, especially early-season Hamlin, a smaller crop was likely no matter how much each tree yields. The numbers also show the industry rebuilding. About 3.7 million trees, nearly 14% of the state's total, were planted between 2023 and 2025 and are not yet bearing. Almost a third of all grapefruit trees fall in this young group. Because these trees aren't producing fruit yet, they barely show up in this year's forecast. A smaller forecast is therefore no verdict on the growers replanting today. Their investment is expected to show up in future seasons, as young trees reach bearing age. Helping those plantings and the remaining mature trees succeed is the current industry mission.

By the end of the 2025-26 season, Florida's citrus research effort was entering a new phase. Under 2026 state legislation, the Citrus Research and Field Trial (CRAFT) Foundation and the Citrus Research and Development Foundation (CRDF) merged efforts on October 1, 2026. The

merger puts basic laboratory research and large-scale field testing in the same organization, so promising findings can move more directly into commercial groves. The combined group has a broader board, a grower-led research management committee, and a technical working group of scientists from UF/IFAS, USDA-ARS, and FDACS. It also has $164.5 million in new state money: $160 million for large field trials and $4.5 million for basic research, with USDA funds covering the upkeep of projects already underway. The 2026 funding builds on the momentum of investments made in citrus research in recent years, with CRAFT previously receiving about $195 million in funding, and CRDF investing more than $341 million in research.

The funding is aimed at achieving two goals: keeping the currently producing trees productive and planting healthy new trees. The Existing Tree Therapies program pays growers to test approved treatments on mature trees over several years, and growers from earlier rounds can extend their trials. The Cycle 8 planting program supports new plantings with grower-selected rootstock and scion combinations. A royalty reimbursement component is included to offset part of the cost of licensed varieties. Together, these programs provide practical data from working groves on which therapies and tree choices hold the most promise for future production.

For Florida growers, successes observed in the 2025-26 season underscore the urgency of accelerating tree replanting efforts, investing in disease management, and bolstering marketing strategies to sustain consumer demand amid tighter supplies and higher retail prices.

Florida Orange Crop, Utilization, and Movement

This section provides an overview of world orange production and utilization trends that may have an impact on the Florida citrus industry outlook during the 2026-27 season based on the most recent information. Table 1 provides estimates of the orange utilization and outlook of the

world's leading suppliers of orange juice to the U.S. market, namely Brazil, Mexico, and the United States, in terms of 90-lb equivalent boxes.

Total combined orange production in the United States, Brazil, and Mexico is expected to decline by 7.3% with the United States, Brazil, and Mexico expected to produce approximately a combined 407.3 million 90-lb equivalent boxes in the 2026-27 season.

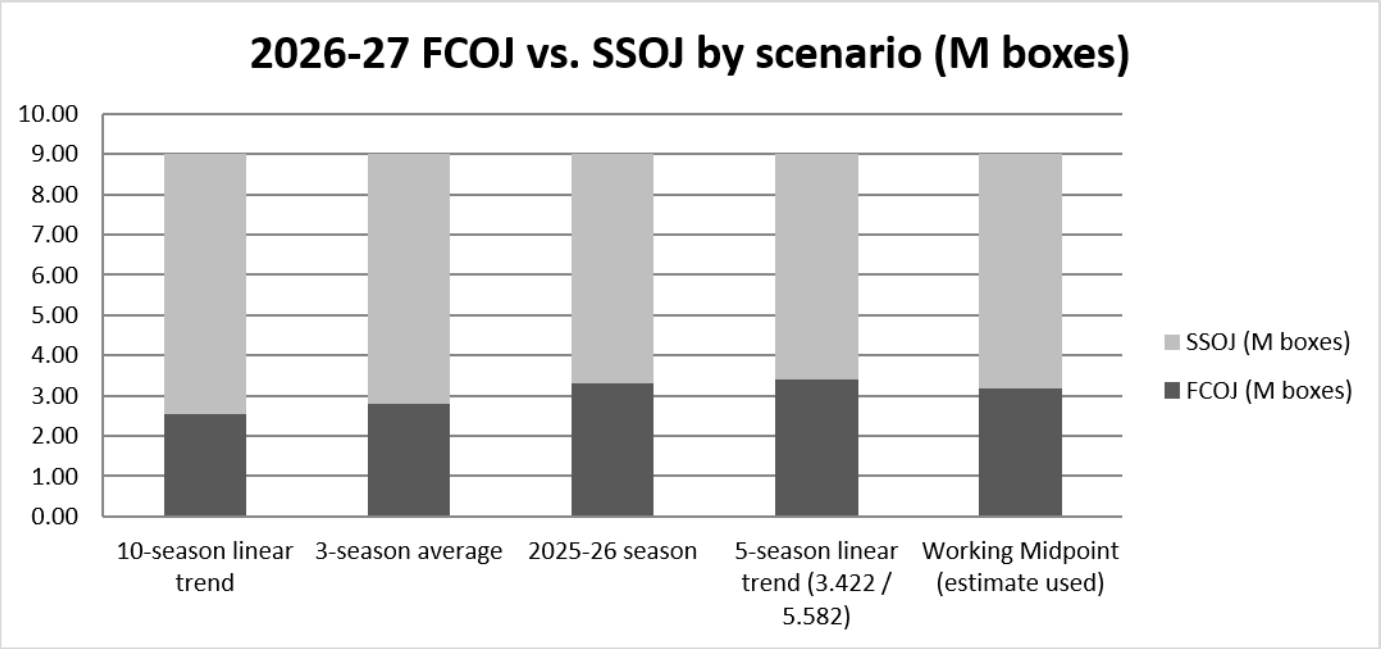
Specifically, the United States is expected to produce 47.1 million 90-lb equivalent boxes, Brazil is expected to produce 323.2 million 90-lb equivalent boxes, and Mexico is expected to produce an estimated 37.0 million 90-lb equivalent boxes in the 2026-27 season. The data suggests that approximately 73.9% of production in these countries will be utilized for processing, which represents a projected 9.8% decline over last season. The remainder of this section examines utilization within each country. .

Florida

The USDA/NASS October forecast for the 2026-27 Florida round orange crop is 10.0 million boxes, which would represent a decline of 22.8%, or equivalent to 3.0 million boxes compared to last season's crop of 13.0 million boxes. Table 2 reports Florida orange box utilization. The 2026-27 early and mid-season orange crop forecast, including Navel oranges, is 3.00 million boxes, down 1.77 million boxes (or a decline of 37.1%) from last season. The navel orange crop is forecasted at 80,000 boxes, representing 2.7% of the total early and mid-season orange crop estimate. The Valencia crop is forecasted at 7.0 million boxes, a projected 14.4% decrease over last season's Valencia production of 8.2 million boxes.[2]

This Outlook assumes approximately 90.0% of orange production will be utilized in the processed market. The number of round orange boxes directly used for single-strength orange juice

[2] One Florida orange box weighs 90-lb.



(SSOJ), which is used to make not-from-concentrate (NFC) orange juice, is estimated at 5.80 million boxes (or 64.5% of total processed utilization) in the 2026-27 season, a decrease of 1.49 million boxes from last season. Figure 1 illustrates various scenarios under which the processed allocation between SSOJ and FCOJ has been estimated. Total fresh versus processed utilization is treated exogenously, and processor trends are implicitly considered. The quantity of orange boxes used in 2026-27 to produce FCOJ is estimated at 3.20 million boxes, a decrease of 1.08 million boxes compared to last season's utilization of 4.28 million boxes. Certified fresh orange shipments in 2026-27 are estimated at 0.95 million boxes, down 27.5% from the 1.31 million boxes shipped last season. Florida's certified processed orange utilization is estimated at 9.00 million boxes, a decrease of 22.5% compared to last season's utilization of 11.62 million boxes.

The total juice yield for Florida processed production is roughly estimated to be 4.896 SSE gallons per box for the 2026-27 season, currently aligned with the production data for combined SSOJ and FCOJ juice yield and reported boxes from Florida processors during the 2025-26 season. An overview of historical juice yields is reported in Table 4.

Figure 1. Florida processed orange crop utilization scenarios in 2026-27.

São Paulo

All Brazil production data presented in this section is based on the most recently available Fundecitrus forecast for the state of São Paulo and the West-Southwest Minas Gerais citrus belt, originally released in May 2026 and revised in September 2026. Additional information and context regarding Brazil's citrus industry were reviewed from the USDA Foreign Agricultural Service (FAS) GAIN report, "Brazil: Citrus Annual", released in January 2026. Without final estimates on juice production and yields, this report is based on previous season assumptions. Total juice availability may be overstated.

Brazil is the leading exporter of orange juice in the world, with the majority of production reaching markets in Europe, North America, and Asia. Orange juice production in the State of São Paulo and the West-Southwest Minas Gerais citrus belt, where most of Brazil's oranges for processing are grown, decreased by roughly 10% over the previous season, from 292.9 million 90-lb equivalent boxes to 263.2 million 90-lb equivalent boxes, representing a reduction of 29.8 million boxes. The current estimates for the São Paulo orange crop, as reported by Fundecitrus, are found in Table 3. The juice yield for São Paulo production is roughly estimated to be 4.321 SSE gallons per box for the 2026-27 season based on an evaluation of currently available production and movement data. An overview of historical juice yields is reported in Table 4.

The juice yield for São Paulo production is roughly estimated to be 4.321 SSE gallons per box for the 2026-27 season based on an evaluation of currently available production and movement data. An overview of historical juice yields is reported in Table 4.

Mexico

Mexico is the second leading exporter of orange juice. The share of its orange production into the processing sector, and its exports overall, have increased incrementally in recent seasons in response to declines in world orange juice supplies. Although a net exporter of orange juice,

orange production in Mexico is primarily intended for consumption in the fresh, domestic market. However, favorable prices and supply shortages in the United States over the last decade continue to displace fresh utilization in favor of the processed export market. Between 80 to 83 percent of Mexican exports are destined for the U.S. market. The packout rate for fresh oranges declined marginally each season, with supplies diverted to processed utilization. The orange fruit processing period in Mexico, from October through April, overlaps Florida's. While most of the processed utilization goes into FCOJ, with Mexico producing mainly Valencia varieties for processing, NFC production has increased incrementally each season.

Mexico has been afflicted with extreme temperatures, which have significantly impacted citrus production. Multiple years of prolonged heatwaves and dry conditions have placed considerable stress on the trees leading to fruit drop. Without official estimates, this Outlook considers recent trends in production and review information from industry sources. Final estimates rely on USDA/FAS production, supply, and demand data and are to be considered approximations. To reiterate, no official estimates for Mexico are available for the 2026-27 season, only approximations.

Orange production in Mexico is assumed to increase by roughly 30% over the previous season, from 28.4 million 90-lb equivalent boxes to 37.0 million 90-lb equivalent boxes, representing an increase of 8.5 million boxes. The estimates for the Mexico orange crop are based on industry sources in the absence of current data typically reported by USDA/FAS and are found in Table 3. The juice yield for Mexico production is roughly estimated to be 4.622 SSE gallons per box for the 2026-27 season and is based on an evaluation of currently available production and movement data provided by USDA/FAS. However, it is important to note that the juice yield has

been fixed in recent years, stemming from lack of official estimates from Mexico. An overview of historical juice yields is reported in Table 4.[3]

Other U.S. Orange Production

Other U.S. oranges come primarily from California and Texas, with utilization primarily intended for fresh consumption. About 80-85% of California and Texas oranges were once intended for the fresh market. However, in recent years, the processed share has increased to meet U.S. demand amid supply constraints. During the 2023-24 season, California fresh utilization was estimated at 64%, and Texas utilization was estimated at 63%, with the remainder going into processed. During the 2024-25 season, California fresh utilization was estimated at 77% with Texas fresh utilization hovering around 79%, with the remainder going into processed. During the 2025-26 season, California fresh utilization was estimated at 65% with Texas fresh orange utilization at 76%.

According to the USDA/NASS citrus production forecast for the 2026-27 season, California is expected to produce 42.0 million 80-lb boxes of non-Valencia type oranges and 8.5 million 80-lb boxes of Valencia oranges for a total of 50.5 million boxes of oranges, an increase of 2.0% over the previous season. As many as 16.0 million boxes are estimated to be processed into juice based on previous utilization rates. The USDA/NASS citrus production forecast for Texas orange production in the 2026-27 season is estimated to increase by 10.1% to 1.2 million 85-lb boxes. The Texas crop share into processed utilization could represent as many as 338,846 85-lb boxes. For comparison purposes, California and Texas production has been converted into 90-lb Florida-equivalent boxes. On this basis, California and Texas combined production is

[3] Official estimates of production from Mexico were not available at the time of this publication. Estimated juice production is based on yield trends estimated using U.S. Commerce data on Mexico imports and Florida juice receipts data.

equivalent to as many as 14.5 million 90-lb boxes that may be used for processing. The share of single-strength and concentrate is not reported by either state. Despite the increase in overall production, this analysis considers a three-season utilization trend and projects that orange juice production may decrease likely by approximately 6.9% from an estimated 68.9 million SSE gallons of orange juice in the 2025-26 season to 64.2 million SSE gallons in the 2026-27 season.

Orange Juice Production and Availability

This section describes orange juice (OJ) availability on the domestic market by evaluating world production, inventories, and movement. Orange juice production and availability are key measures in sustaining the demand for Florida citrus products over the long run. Table 5 provides estimates of comparative juice production from Florida, São Paulo, and Mexico based on their respective production seasons. For the 2026-27 Florida season, the estimated total supply of orange juice on the world market is projected to decrease by 13.5% over the previous period, from 1.44 billion SSE gallons to 1.25 billion SSE gallons due to reduced availability in production from leading suppliers such as São Paulo, Mexico, and the United States (Table 5). Florida production is estimated to contribute 3.5% of orange juice to this total supply this season.

Global trade continues to respond to supply constraints even with increases in inventory levels and supplies. Elevated beginning inventories and increased production serve as a cushion rather than a sign of surplus and slumping global demand. OJ inventory levels in the Brazil and the U.S. help to meet current demand, particularly given that combined availability entering the Florida season remained below historical norms. While Mexico also remains an important supplier of OJ to the U.S. market, the extent to which Mexican processors hold consistent multi-year inventories is unclear without official reporting structures. In recent years, Brazil and Mexico have become key sources of NFC for the U.S. market, contributing to substitution away from FCOJ

during periods of tight supply. Taken together, these dynamics reinforce that increases in Brazil's production or beginning stocks levels in Florida do not necessarily translate into looser market conditions. Global orange juice inventories remain below levels typically associated with comfortable availability.

Comparisons of orange juice beginning inventories and production levels for Florida, Brazil, and Mexico are provided in Table 6. Aggregate OJ availability from the three leading suppliers in 2026-27 is projected at 1.72 billion SSE gallons, a decrease of 130.6 million SSE gallons (or down 7.1% from last season's 1.85 billion SSE gallons), largely due to the decline in juice yields and reduced orange production. World orange juice production must also consider world demand for orange juice stocks as the United States is only one market for the leading suppliers. While the vast majority of U.S. orange juice production is consumed domestically, Brazil and Mexico orange juice production is primarily intended for the world market. Table 7 reports Brazil's orange juice exports by destination, while Table 8 reports U.S. orange juice imports by country of origin and juice type.

Based on Brazilian Department of Foreign Trade (SECEX) data, an estimated 1.14 billion SSE gallons of OJ were exported from Brazil in 2025-26, up 3.9% from the 1.09 billion SSE gallons exported in 2024-25. Most of Brazil's orange juice exports are bound for Europe, with shipments to Europe during the 2025-26 season estimated at 539.6 million SSE gallons (representing approximately 47% of all exports), an estimated 2.8% decline over the previous season. The majority of Brazil's exports to Europe are frozen concentrate, representing 67% of the total in 2025-26, with NFC exports on the rise each season. A portion of Brazil's OJ sent to Europe may be re-exported to other markets. Brazil's OJ exports to East Asia were also down by 19.5% with 61.2 million SSE gallons. Brazil's exports to North American (USMCA) countries were up

by 16.2% with 507.5 million SSE gallons, primarily intended for the U.S. market. A declining share, approximately 40%, of these exports in the 2025-26 season were frozen concentrate, used to make reconstituted, shelf-stable, and frozen orange juice, signaling a rise in the NFC export market to USMCA. Table 7 estimates Brazil's 2026-27 SSE gallons of OJ exports based on availability and recent trends.

Table 8 provides a summary of U.S. imports of orange juice by origin and type. For FCOJ, imports through Florida Ports decreased from 222.59 million gallons in the 2024-25 season to 172.93 million gallons in the 2025-26 season, representing a decrease of 49.65 million gallons. Similarly, imports from Brazil decreased from 155.07 million gallons to 123.34, showing a reduction of 31.74 million gallons. On the other hand, imports from Mexico decreased from 53.70 million gallons to 21.72, representing a reduction of 31.98 million gallons. In total, FCOJ imports declined from 282.14 million gallons in 2024-25 to 227.04 million gallons in 2025-26, indicating a decrease of 55.09 million gallons. For NFC-OJ, imports through Florida Ports declined from 211.77 million gallons in the 2024-25 season to 206.82 million gallons in the 2025-26 season, indicating a decline of 4.95 million gallons. Imports from Brazil, which is a significant contributor to NFC-OJ imports, also fell from 200.24 million gallons to 194.99, representing a decrease of 5.25 million gallons. In total, NFC-OJ imports decreased from 278.35 million gallons in 2024-25 to 265.08 million gallons in 2025-26, indicating a reduction of 13.27 million gallons.

Florida Orange Juice Inventory and Movement

Both demand-side and supply-side factors affecting orange juice availability are analyzed in this section. Florida's orange juice (OJ) situation continues to be affected by the historical trend in reduced production levels largely associated with the spread of Huanglongbing (HLB, also known as citrus greening), weather-related events, and the fluctuation in global supplies.

Preliminary projections for the Florida OJ situation (October-September season) are shown in Table 9. Florida's OJ imports are based on aggregate OJ availability from Florida, Brazil, and Mexico , and are adjusted for Florida processor trends. Three scenarios for 2026-27 are provided, varying with respect to Florida processor imports.

The 2025-26 Florida citrus season concluded with a year-over-year increase in combined SSOJ and FCOJ inventories from the previous season. Combined Florida OJ ending inventory for the 2025-26 season is 259.1 million SSE gallons or 30.6 weeks of supply, compared to 20.8 weeks in the previous 2024-25 season. Adding the 2025-26 ending inventory to the 2026-27 estimate of Florida OJ production of 44.1 million SSE gallons, plus estimated imports and other adjustments totaling 426.1 million SSE gallons, Florida's OJ availability in 2026-27 (October 2026 through September 2027) is estimated at 729.2 million SSE gallons, up 8.8 million SSE gallons (or 1.2%) from last season's level. Total movement in 2026-27 is estimated to decline by 34.4 million SSE gallons (or 7.5%) to 426.9 million SSE gallons from last season. By the end of the 2026-27 season, Florida's OJ ending inventory is estimated to increase to 302.3 million SSE gallons (or 36.8 weeks of supply).

Import quantities will most likely be influenced by actual production, movement, and availability from non-Florida sources observed during the 2026-27 season. Holding all trends constant and considering alternate import scenarios where OJ imports are 10% higher and 10% lower than discussed in the previous paragraph, ending inventories would range from 263.4 million SSE gallons (32.1 weeks supply) to 341.2 million SSE gallons (41.6 weeks supply). Estimates of Florida's inventory, production, and movement levels for FCOJ and NFC, underlying the total OJ estimates in Table 9, are shown in Table 10 and Table 11.

This analysis assumes approximately 35.5% of Florida processed orange utilization will be processed as FCOJ during the 2026-27 season. Beginning Florida processor inventories of FCOJ for the 2026-27 season totaled 166.8 million SSE gallons, an increase of 38.0% compared to the previous season. Florida processor FCOJ production is estimated at approximately 15.6 million SSE gallons based on an estimated utilization of 3.20 million boxes of round oranges and an average FCOJ juice yield of 4.87 gallons per box in 2026-27 season. Imports of FCOJ, which is used to make Recon, shelf-stable, and frozen orange juice, are projected to decrease by 20.0% to 148.0 million SSE gallons. Total overall FCOJ availability is projected to increase by 0.9% when compared to the 2025-26 season due to higher beginning inventoriy levels. Total movement is projected to decline by at least 8.8% as a result of the decline in market access experienced in the previous season. Based on the estimated utilization, receipts, and movement trends, FCOJ ending inventories will likely to experience additional increases by the end of the season to approximately 185.7 million SSE gallons (or 58.2 weeks of supply).

This analysis assumes that approximately 64.5% of Florida processed orange utilization during the 2026-27 season will be processed as SSOJ, which is used for NFC orange juice. At the onset of the 2026-27 season, beginning Florida processor inventories of SSOJ were 92.3 million SSE gallons (18.4 weeks supply), an increase of 24.8% when compared to the previous season. Florida processor SSOJ production is estimated at approximately 28.5 million SSE gallons based on an estimated utilization of 5.80 million boxes of round oranges and an average juice yield of 4.91 SSE gallons per box, which would be a decrease of 20.8% compared to the pack last season. Imports and domestic receipts of SSOJ are projected to increase by 3.9% to 240.7 million SSE gallons. Total overall SSOJ availability is projected to increase by 5.2% when compared to the 2025-26 season. Total movement, including EVAP into Recon, is projected to decline by at least

2.1% with a majority of SSOJ consumed through retail channels. Based on the estimated utilization, receipts, and movement trends, SSOJ ending inventories are projected to increase by the end of the season to approximately 116.6 million SSE gallons (or 23.2 weeks of supply).

U.S. Orange Juice Supply, Disappearance and Retail Sales

The volume of orange juice disappearance, which is derived from comprehensive inventory data tracking, orange juice produced from the current crop, imports, exports, and ending inventory, serves as a pivotal measure in this analysis, offering insights into the availability of orange juice to meet consumer demand and serves as a proxy for what is referred to as presumed consumption.

Presumed consumption is a rough measure of market performance reflecting orange juice movement in which the disappearance of orange juice from measurable data is calculated as the sum of: 1) beginning U.S. inventory, 2) Florida and other U.S. production, and 3) U.S. imports minus 1) U.S. exports and 2) ending U.S. inventory. U.S. ending inventories for OJ consider Florida processor ending inventories and the USDA-NASS cold storage survey report. Cold storage stocks are updated monthly.

Preliminary estimates of total U.S. orange juice disappearance are projected at 558.7 million SSE gallons for the 2026-27 season, a projected decline of 2.0% from an estimated 569.9 million SSE gallons consumed in the previous season (Table 12). The projected reduction in consumption primarily reflects supply-side constraints and changes in distribution channels compared to the 2020-21 season. Total U.S. orange juice production is estimated at 105.2 million SSE gallons based on the preliminary USDA estimate for the orange crop in Florida, California, and Texas (NASS/USDA, 2026a). Total U.S. orange juice imports are projected at 501.6 million SSE gallons, a projected decrease of 7.1% over the previous season. The projected decline in total U.S. imports may reflect surplus inventories held over due to a decline in foodservice movement.

U.S. exports are projected at 29.5 million SSE gallons, a 1.4% decrease over last season.

By comparison, Florida processor orange juice receipts, movement, and net change in inventory are reported in Table 13. Net from Florida fruit refers to the orange juice production from Florida-sourced oranges in each season, which is compared to receipts of 100% orange juice from imported sources, domestic sources, and non-reporting Florida facilities. Movement is reported as domestic packaged and bulk movement as well as exports. During the 2026-27 Florida citrus season, Florida orange production is projected to account for 10.0% of SSOJ and 8.9% of FCOJ receipts by processors, respectively. Specifically, Florida processors are expected to receive 28.5 million gallons of SSOJ from Florida production and 257.4 million gallons from other sources. Florida processors are expected to receive 16.6 million gallons of FCOJ from Florida's orange crop with a remaining 169.5 million gallons from other sources. The majority of SSOJ movement from Florida processors is packaged, whereas the majority of FCOJ movement occurs as bulk movement for packaging out of state. It is estimated that between 63-68% of orange juice from Florida movement is consumed through retail channels, with the remainder consumed as foodservice and institutional demand.

The Nielsen Topline Report provides more exact measures across retailers, but with abridged market coverage. The Florida Department of Citrus (FDOC) purchases Nielsen retail outlet data for OJ sales in grocery stores with annual sales of at least $2 million, drug stores with annual sales of at least $1 million, mass merchandisers, such as Wal-Mart, club (Sam's and BJ's), dollar stores (Dollar General, Family Dollar, and Fred's), and military/Defense Commissary Agency (DeCA). The following analysis is based on the Nielsen retail universe Expanded All Outlets Combined (xAOC) data described above. The average price of orange juice and OJ volume sales at retail during the 2025-26 season is largely dependent upon juice availability, market

growth/ contraction, current rates on inflation affecting retail prices, and substitutes for OJ not yet known. In forecasting orange juice sales, it is assumed that consumer behavior during 2025-26 will continue into the 2026-27 season, despite ongoing concerns over high inflation. Estimated price projections consider a high price scenario and are adjusted for various marketing conditions, such as consumer demand trends, promotional activities, and competitive pricing, with a sensitivity analysis provided for three price scenarios in Table 14.[4]

Retail OJ sales depend on availability, prices, consumer purchasing patterns, and competing beverages. Three price scenarios are presented in Table 14. Scenario 1 (middle or base price): the average retail OJ price is projected at $11.89 per SSE gallon in 2026-27, compared with $11.83 in 2025-26, representing an increase of 0.5%. Retail sales volume is projected at 264.1 million SSE gallons, representing a decrease of 4.2% compared with the previous season.

Scenario 2 (high price): the average retail OJ price is projected at $12.82 per SSE gallon in 2026-27, compared with $11.83 in 2025-26, representing an increase of 8.4%. Retail sales volume is projected at 253.5 million SSE gallons, representing a decrease of 8.0% compared with the previous season.

Scenario 3 (low price): the average retail OJ price is projected at $11.83 per SSE gallon in 2026-27, compared with $11.83 in 2025-26, representing no material change. Retail sales volume is projected at 274.6 million SSE gallons, representing a decrease of 0.3% compared with the previous season.

Estimates of sales by segment (NFC, RECON, FCOJ, and Other Types of OJ) are also shown in the table. Under the middle price scenario, shares of total retail OJ volume are NFC

[4] Retail market forecasts prepared by Sungeun Yoon, Ph.D. and Moonwon Soh, Ph.D., Assistant Research Scientists, Food and Resource Economics Department, University of Florida

69.9%, Recon 25.7%, frozen OJ 2.7%, and Other OJ (mostly shelf-stable) 1.6%. Segment prices and volumes are shown separately in the table.

Orange juice that is sold on trade promotion at retail has been at historically low levels the last couple of years, contributing to the increase in the average price. The share of orange juice sold on promotion with corresponding price per equivalent gallon is reported in Table 15. Nielsen collects promotional information from retailers, known as trade promotions, which are compiled into four categories in the FDOC Nielsen custom database. The key promotional items are: 1) feature items, 2) display items, 3) a combination of both features and display, and 4) temporary price reductions (also known as price decrease). The FDOC Nielsen custom database provides periodic updates on the share of retail sales sold with and without promotions. Feature items are retailer specific promotions, such as print ads and coupons from retailers. Displays must be set in a secondary selling location and showcase a product in high traffic areas that consumers can pick up and purchase. A display must be temporary for Nielsen to recognize as a display. A promotion that combines elements of features and displays are tracked separately. Finally, a common trade promotion is a temporary price reduction. Price decreases must be at least five percent lower than the regular price. If the lower price persists over 13 consecutive weeks, Nielsen will consider the reduced price as the new regular price and will no longer record the item as sold on promotion (source: NielsenIQ).

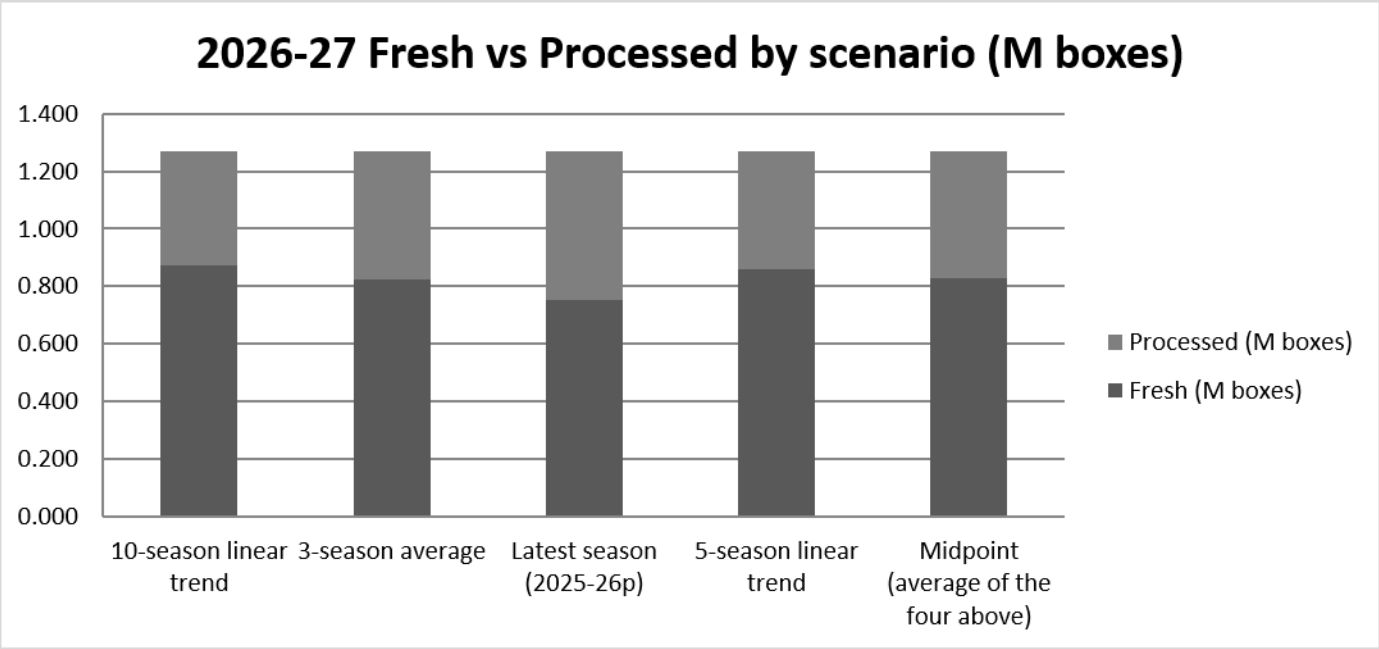
Table 15 summarizes retail orange juice promotions across multiple store formats, including grocery stores, mass merchandisers, and others, for the 2024-25 and 2025-26 seasons. During the 2025-26 season, promotional activity for NFC orange juice accounted for 28.9% of total sales, which is an increase from 22.2% in the 2024-25 season. Recon orange juice saw promotional activity at 30.3% of total sales in 2025-26, compared to 23.1% in the previous season,

indicating a significant change. Overall, total promotional sales represented 28.4% of all orange juice sales during 2025-26, compared to 21.7% in 2024-25. For orange juice sold without promotions, NFC sales were at 71.1% of total sales in 2025-26, compared to 77.8% in the previous season. Recon orange juice accounted for 69.7% of non-promotional sales in 2025-26, which is lower compared to 76.9% in 2024-25. Total non-promotional sales decreased from 78.3% in 2024-25 to 71.6% in 2025-26. The average price for NFC orange juice sold on promotion increased from $10.61 per SSE gallon in 2024-25 to $11.31 in 2025-26. Recon orange juice sold on promotion had an average price of $8.76 in 2025-26, compared to $8.57 in 2024-25. For non-promotional sales, NFC orange juice was priced at $13.54 per SSE gallon in 2025-26, compared to $12.29 in the previous season, while Recon prices changed from $9.63 to $9.76 per SSE gallon.

Florida Fresh Orange Shipments, by Market

Florida fresh certified shipments are reported in Table 16. Certified fresh orange utilization is projected to account for approximately 9.5% of total orange production during the 2026-27 season. Certified fresh orange shipments in 2026-27 are estimated at 0.95 million boxes (equivalent to 1.89 million cartons), which would be a decrease of 27.5% from the 1.31 million boxes (equivalent to 2.61 million cartons) shipped last season. Domestic fresh orange shipments are projected at 1.87 million cartons, down by 719,056 cartons. The domestic share is projected to be about 99% of all Florida fresh orange shipments in 2026-27. Florida packers are projected to export 24,953 cartons of fresh oranges during the 2026-27 season, representing a decline of 0.7% compared to last season. Accounting for 59% of all exports, Canada was the leading destination of Florida fresh oranges.

Within the domestic market, South represents the largest share of Florida fresh orange movement at approximately 44.7%, followed by Northeast at 29.4%, Central at 22.7%, and West



at 3.2%. Compared to last season, fresh orange movement to the South is projected to decline by approximately 27.7%, while movement to the Northeast is projected to decline by approximately 23.8%. Central movement is projected to decline by approximately 25.1%, while movement to the West is projected to decline by approximately 58.7% compared to last season.

Florida Grapefruit Crop, Utilization and Movement

The USDA/NASS October estimate of the Florida grapefruit crop in 2026-27 is 1.30 million boxes, a decrease of 3.7% from last season's crop of 1.35 million boxes (Table 17). Florida grapefruit production has suffered losses of more than 94% since the 2008-09 season due to the harmful impacts of hurricanes and HLB. Figure 2 illustrates various scenarios under which the Florida certified fresh grapefruit allocation has been estimated.

Certified fresh grapefruit shipments are estimated to be 826,391 boxes in 2026-27, up by 6% compared to certified fresh utilization last season. Non-certified fresh utilization is forecasted at 30,247 boxes in 2026-27. Processed utilization is projected to account for approximately 34%

Figure 2. Florida grapefruit crop utilization scenarios in 2026-27.

of the total crop and is estimated at 443,362 boxes, a decline of about 14.5% compared to the 2025-26 season. This outlook assumes that utilization of the processed grapefruit crop into single-strength grapefruit juice (SSGJ), which is used to make NFC grapefruit juice, is expected to account for as much as 100% of processed utilization with an estimated 0.44 million boxes used this season, which represents a decrease of about 14.5% compared to last season. Utilization of the processed grapefruit crop into frozen concentrated grapefruit juice (FCGJ) is estimated at zero boxes in 2026-27, equal to last season.

Florida Grapefruit Juice Inventory and Movement

Florida processors began the 2026-27 season with 4.41 million SSE gallons of GJ in inventory, including 4.27 million SSE gallons bulk (23.4 weeks supply), down from the previous season's level of 4.92 million SSE gallons (25.0 weeks supply based on average movement at that time) (Table 18). Combined GJ production plus processor imports, both domestic and foreign, in 2026-27 is estimated at 8.87 million SSE gallons, up 1.14 million SSE gallons from last season. Combining production with beginning inventories, GJ availability in 2026-27 is estimated at 13.3 million SSE gallons, up by 5.0% and representing an incr

ease of 0.63 million gallons from last year. GJ movement in 2026-27 is estimated at 9.59 million SSE gallons, down 1.0% from last year. The 2026-27 ending inventory for Florida GJ is estimated at 3.69 million SSE gallons (or 20.0 weeks supply). Table 18 also describes the availability, movement, and inventory estimates for FCGJ and single-strength grapefruit juice (SSGJ) projected for the 2026-27 season.

Florida processors are projected to utilize 100% of processed grapefruit for SSGJ (or GJ NFC). Beginning inventory of SSGJ for the 2026-27 season is up by 11.1% over the previous season at 3.67 million SSE gallons (22.86 weeks supply). Production from Florida fruit is

estimated at 2.22 million SSE gallons based on an estimated 0.44 million boxes of grapefruit and a juice yield of 5.014 SSE gallons per box, representing a 30.2% decrease in pack from fruit over the previous season.

Total availability of Florida FCGJ in the 2026-27 season is projected at 1.77 million SSE gallons, which represents a decline of 12.0% compared to the 2025-26 season. Beginning inventories are expected to decline from 1.62 million SSE gallons to 0.75 million SSE gallons in 2026-27. Imports are projected to increase to 1.02 million SSE gallons from 0.39 million SSE gallons in the prior season, helping to offset lack of pack-from-fruit volumes. Despite the rise in imports, ending inventories for the 2026-27 season are expected to tighten to 0.58 million SSE gallons compared to 0.75 million SSE gallons in 2025-26.

In some seasons, the level of GJ exports reported by the Florida citrus processors has exceeded the level reported by the U.S. Department of Commerce. The U.S. Department of Commerce data are tracked to provide an indication of market shares across export destinations.

U.S. Grapefruit Juice Supply, Disappearance, and Retail Sales

The volume of grapefruit juice disappearance, derived from comprehensive inventory data tracking, grapefruit juice produced from the current crop, imports, exports, and ending inventory, serves as a pivotal measure in this analysis, offering insights into the availability of grapefruit juice to meet consumer demand and serves as a proxy for what is considered to be presumed consumption.

Presumed consumption is a rough measure of market performance reflecting grapefruit juice movement in which the disappearance of grapefruit juice from measurable data is calculated as the sum of: 1) beginning U.S. inventory, 2) Florida and other U.S. production, and 3) U.S. imports minus 1) U.S. exports and 2) ending U.S. inventory. U.S. ending inventories for GJ

consider Florida processor ending inventories and industry sources for the rest of the United States. The measure considers combined grapefruit juice types in which not-from-concentrate grapefruit juice and frozen concentrated grapefruit juice are not disaggregated.

U.S. disappearance of GJ is estimated at 15.65 million SSE gallons in 2026-27, compared to 15.54 million SSE gallons in the previous season (Table 19). Disappearance is expected to increase by 1% between the 2025-26 season and the 2026-27 season, but may be overstated as previous season estimates would have included cold storage supplies not tracked within the FDOC Florida processor database or by USDA cold storage estimates. Total U.S. GJ production is estimated at 15.76 million SSE gallons based on Florida processor data and the USDA forecast of the grapefruit crop in California and Texas. Total U.S. GJ imports are estimated at 4.68 million SSE gallons, a decrease of 8% over the previous season. U.S. exports are projected at 3.50 million SSE gallons based on analysis of Florida processor statistics.

Other U.S. grapefruit comes primarily from California and Texas, with utilization intended for both fresh and processed consumption. According to the USDA/NASS citrus production forecast for the 2026-27 season, California is expected to produce 4.80 million 80-lb boxes of grapefruit, which would be an increase of 9.1% compared to the previous season. As many as 2.18 million boxes are estimated to be processed into juice this season based on previous utilization rates. The USDA/NASS citrus production forecast for Texas grapefruit production in the 2026-27 season is estimated to increase by 14.3% to 2.40 million 80-lb boxes. The Texas crop share into processed utilization could represent as many as 0.69 million 80-lb boxes. This analysis estimates that as many as 2.70 million 85-lb Florida equivalent boxes of California and Texas combined production may be used in processing of grapefruit juice. The share of single-strength and concentrate is not reported by either state. This analysis projects that grapefruit juice production

may increase by approximately 10.3% from an estimated 12.3 million SSE gallons of grapefruit juice in the 2025-26 season to 13.5 million SSE gallons in the 2026-27 season.

Retail GJ sales depend on availability, prices, consumer purchasing patterns, and competing beverages. Three price scenarios are presented in Table 20. Scenario 1 (middle or base price): the average retail GJ price is projected at $12.61 per SSE gallon in 2026-27, compared with $12.19 in 2025-26, representing an increase of 3.5%. Retail sales volume is projected at 7.8 million SSE gallons, representing a decrease of 9.9% compared with the previous season. Scenario 2 (high price): the average retail GJ price is projected at $13.12 per SSE gallon in 2026-27, compared with $12.19 in 2025-26, representing an increase of 7.6%. Retail sales volume is projected at 7.6 million SSE gallons, representing a decrease of 11.7% compared with the previous season.

Scenario 3 (low price): the average retail GJ price is projected at $11.92 per SSE gallon in 2026-27, compared with $12.19 in 2025-26, representing a decrease of 2.2%. Retail sales volume is projected at 7.8 million SSE gallons, representing a decrease of 9.0% compared with the previous season.

Estimates of sales by segment (NFC, RECON, FCGJ, and Other Types of GJ) are also shown in the table. Under the middle price scenario, shares of total retail GJ volume are NFC 67.4%, Recon 3.9%, Other GJ (mostly shelf-stable) 28.1%, and frozen GJ 0.5%. Segment prices and volumes are shown separately in the table.

Table 21 summarizes retail grapefruit juice promotions across multiple store formats, including grocery stores, mass merchandisers, and others, for the 2024-25 and 2025-26 seasons. During the 2025-26 season, promotional activity for NFC grapefruit juice accounted for 35.0% of total sales, which is an increase from 30.3% in the 2024-25 season. Recon grapefruit juice saw promotional activity at 11.3% of total sales in 2025-26, compared to 11.2% in the previous season,

indicating a slight change. Overall, total promotional sales represented 26.3% of all grapefruit juice sales during 2025-26, compared to 24.2% in 2024-25. For grapefruit juice sold without promotions, NFC sales were at 65.0% of total sales in 2025-26, compared to 69.7% in the previous season. Recon grapefruit juice accounted for 88.7% of non-promotional sales in 2025-26, which is slightly lower compared to 88.8% in 2024-25. Total non-promotional sales decreased from 75.8% in 2024-25 to 73.7% in 2025-26. The average price for NFC grapefruit juice sold on promotion increased from $10.56 per SSE gallon in 2024-25 to $10.74 in 2025-26. Recon grapefruit juice sold on promotion had an average price of $11.27 in 2025-26, compared to $10.58 in 2024-25. For non-promotional sales, NFC grapefruit juice was priced at $14.30 per SSE gallon in 2025-26, compared to $13.55 in the previous season, while Recon prices changed from $9.11 to $9.02 per SSE gallon.

Fresh Grapefruit Shipments, by Market

Florida fresh certified grapefruit shipments are reported in Table 22. Certified fresh grapefruit utilization is projected to account for approximately 64% of total grapefruit production during the 2026-27 season. Certified fresh grapefruit shipments in 2026-27 are currently estimated at 0.83 million boxes (equivalent to 1.65 million cartons), representing an increase of approximately 6.0% compared to last season. Domestic fresh grapefruit shipments are projected at approximately 1.59 million cartons and account for nearly 96% of total fresh grapefruit movement. Export shipments are projected at approximately 62,650 cartons, accounting for about 4% of total movement. While both domestic and export movements are projected to change from last season, the domestic movement change is greater, further increasing the share of fresh grapefruit moving through the domestic market. Canada remains the leading export destination, accounting for approximately 63% of Florida fresh grapefruit exports.

Within the domestic market, South represents the largest share of Florida fresh grapefruit movement at approximately 56.5%, followed by Northeast at 32.7%, Central at 8.5%, and West at 2.3%. Compared to last season, fresh grapefruit movement to the South is projected to increase by approximately 7.5%, while movement to the Northeast is projected to increase by approximately 5.7%. Central movement is projected to increase by approximately 16.1%, while movement to the West is projected to decline by approximately 27.9% compared to last season.

Florida Specialty Crop and Utilization

The USDA/NASS October estimate of the Florida specialty crop in 2026-27 is 450,000 boxes, a decrease of 10,000 boxes from last season (Table 23). Despite higher FOB prices in recent years, specialty production has declined about 94% since the 2007-08 season. The USDA/NASS preliminary estimate of specialty citrus includes tangelos, Royal tangerines (formerly known as Temple oranges), early tangerine varieties, honey tangerines, Autumn Honey, Juicy Crunch, Orri, Roe, Tango, and other minor tangerine varieties. Temples were classified and reported as early-midseason oranges between the 2005-06 and 2015-16 seasons. Florida certified shipments are estimated to be about 62% of the crop with an estimated 279,495 boxes (equivalent to 558,990 cartons) moving during the 2026-27 season to primarily the domestic market (Table 24).

Domestic fresh specialty shipments are projected at 553,882 cartons, down by less than 200 cartons. The domestic share is expected to represent 99.1% of annual shipments. Florida packers are projected to export approximately 5,108 cartons of fresh specialty fruit during the 2026-27 season, representing an increase of about 186 cartons over last season. Accounting for 81% of exports, Canada is the leading destination of Florida fresh specialty.

Within the domestic market, South represents the largest share of Florida fresh specialty movement at approximately 59.9%, followed by Northeast at 22.6%, West at 11.3%, and Central

at 6.2%. Compared to last season, fresh specialty movement to the South is projected to increase by approximately 1.1%, while movement to the Northeast is projected to decline by approximately 2.8%. Central movement is projected to decline by approximately 1.5%, while movement to the West is also projected to decline slightly compared to last season.

Summary: Implications for the Florida Grower

The USDA/NASS October 9th citrus forecast places total Florida citrus production for the 2026-27 season at 11.75 million boxes, a 20.4% decline from last season. Total U.S. citrus production is forecast at 132.45 million boxes, up 1.5%, including 61.70 million boxes of oranges, 8.50 million boxes of grapefruit, 32.45 million boxes of specialty tangerines and tangelos, and 29.80 million boxes of lemons.

The Florida round orange crop is forecast at 10.0 million boxes, down 22.8% from last season. Approximately 90.0% of Florida oranges are expected to go to processing, with an estimated 5.80 million boxes used for NFC orange juice and 3.20 million boxes for FCOJ. Certified fresh orange shipments are projected at 0.95 million boxes, down 27.5%, with approximately 99% destined for the domestic market. Combined orange juice production from Florida, São Paulo, and Mexico is projected to decline 13.5% to 1.25 billion single-strength equivalent (SSE) gallons. Florida is expected to contribute approximately 3.5% of that production, leaving the state's processors and the domestic market closely tied to supplies from other origins.

Global orange juice availability remains sensitive to crop size, juice yields, and competing demand across export markets. The projected decline in São Paulo production reinforces the importance of carryover inventories and imports in meeting U.S. demand. Higher Florida processor inventories provide a cushion against supply disruptions, but they also reflect slower

movement and differences among juice types and distribution channels. Aggregate inventory growth therefore requires careful interpretation alongside demand and market access.

Florida processor OJ availability is projected at 729.2 million SSE gallons in 2026-27, up 1.2%, while movement is projected to decline 7.5% to 426.9 million SSE gallons. Combined ending inventories are projected to rise to 302.3 million SSE gallons, equivalent to 36.8 weeks of supply. Under alternative import scenarios, ending inventories range from 263.4 million to 341.2 million SSE gallons. Total U.S. OJ disappearance, used as a proxy for consumption, is projected to decline 2.0% to 558.7 million SSE gallons. In contrast, the base retail scenario projects a 0.5% increase in the average OJ price to $11.89 per SSE gallon with a 4.2% decline in measured retail volume to 264.1 million equivalent gallons.

Florida grapefruit production is forecast at 1.30 million boxes in 2026-27, down 3.7% from last season. Certified fresh shipments are projected at approximately 826,000 boxes, or 1.65 million cartons, up 6.0%. Processed utilization is estimated at approximately 443,000 boxes, or 34% of the crop, down 14.5%, with all processed fruit expected to be used for NFC grapefruit juice. Approximately 95% of certified fresh shipments are intended for the domestic market. Exports are projected at approximately 74,000 cartons, with Canada accounting for about 62% of export volume.

Combined grapefruit juice production and processor imports are estimated at 8.87 million SSE gallons in 2026-27, up 1.14 million SSE gallons from last season. Including beginning inventories, Florida processor GJ availability is projected at 13.3 million SSE gallons, up 5.0%. Movement is projected at 9.59 million SSE gallons, down 1.0%, leaving ending inventories at 3.69 million SSE gallons, or 20.0 weeks of supply. Total U.S. GJ disappearance is projected at 15.65 million SSE gallons, compared to 15.54 million last season. The base retail scenario projects an

average GJ price of $12.53 per SSE gallon, up 2.6%, with retail volume declining approximately 0.5%.

Florida specialty citrus production is forecast at 450,000 boxes in 2026-27, down 10,000 boxes from last season. Certified fresh shipments are projected at approximately 279,500 boxes, equivalent to 559,000 cartons and about 62% of the crop. The domestic market is expected to account for 99.1% of shipments. Exports are projected at approximately 5,100 cartons, with Canada accounting for 81% of export volume.

For Florida growers, the smaller crop reflects continued pressure from HLB, weather-related losses, and a reduced commercial acreage and tree base. Commercial citrus acreage declined 21% to 165,359 acres, while the commercial tree count declined 18% to 26.7 million. At the same time, approximately 3.7 million trees planted between 2023 and 2025 are not yet bearing, indicating that recent replanting investments will contribute to future seasons rather than the current forecast. Continued support for existing-tree therapies, healthy new plantings, and the processing and packing infrastructure is essential to sustain production capacity. The combined CRAFT and CRDF research effort and $164.5 million in new state funding provide support for field trials and basic research directed toward these needs.

Demand development remains equally important as the industry rebuilds. The base OJ retail scenario indicates an opportunity for modest volume recovery as average prices stabilize, while weaker overall movement and rising processor inventories underscore the need to preserve market access across retail, foodservice, and institutional channels. Marketing that communicates the nutritional and wellness attributes of Florida citrus, supported by effective promotion and coordinated action among growers, processors, and packers, can help sustain consumer demand for future production.

References

Florida Department of Citrus. 2026a. FDOC Processors statistics database. Economic and Market Research Department, Gainesville, FL.

Florida Department of Citrus. 2026b. Neilsen Retail Sales Monthly Topline Report: Report 13 of the 2025-26 Season. Economic and Market Research Department, Gainesville, FL.

Foreign Agricultural Service. January 2026. Brazil Citrus Annual. GAIN report no. BR2025-0052. U.S. Dept. Agr., Washingotn D.C.

Foreign Agricultural Service. January 2026. Mexico Citrus Update. GAIN report no. MX2025-0069, U.S. Dept. Agr., Washington D.C.

Foreign Agricultural Service Office of Global Analysis. January 2025. Citrus: World Markets and Trade, U.S. Dept. Agr. , Washington D.C.

Foreign Agricultural Service. Downloadable datasets – PSD online- U.S. Dept. Agr., Washingotn D.C.

Fundecitrus. September 2026. 2026-27 Orange Crop Forecast Update for the São Paulo and West-Southwest Minas Gerais citrus belt.

National Agricultural Statistics Service Florida Field Office. 2026a. Citrus October forecast. U.S. Dept. Agr., Maitland, FL.

National Agricultural Statistics Service Florida Field Office. 2026b. Forecast Components Update (August 2026). U.S. Dept. Agr.

National Agricultural Statistics Service Florida Field Office. May 2026c. Florida citrus statistics 2025-26. U.S. Dept. Agr., Maitland, FL.

National Agricultural Statistics Service Florida Field Office. 2026d. Citrus fruits 2026 summary (August 2026). U.S. Dept. Agr.

National Agricultural Statistics Service Florida Field Office. 2026e. Cold Storage Survey (last avail on September 2026). U.S. Dept. Agr.

TABLES

Table 1. Utilization of world oranges – Selected Countries.

	United States			Brazil[b]			Mexico		
Season	Prod[a]	Util Fresh	Util Proc	Prod[a]	Util Fresh	Util Proc	Prod[a]	Util Fresh	Util Proc
	- million 90-lb equivalent boxes -								
2007-08	227.0	49.9	177.1	441.0	110.0	331.0	105.3	80.8	24.5
2008-09[d]	205.2	43.3	162.0	453.0	113.0	340.0	102.7	78.2	24.5
2009-10	186.4	50.3	136.0	413.0	124.0	289.0	99.2	77.7	21.6
2010-11	197.9	51.1	146.7	417.0	130.0	287.0	99.9	77.2	22.8
2011-12	199.6	50.7	148.9	388.0	119.0	269.0	89.8	69.5	20.3
2012-13	183.7	49.8	134.0	554.0	135.0	419.0	107.8	70.8	37.0
2013-14	150.4	42.1	108.3	504.0	177.0	327.0	111.0	81.6	29.4
2014-15[d]	141.2	40.1	101.1	401.0	133.0	268.0	110.6	72.6	38.0
2015-16	135.3	45.1	90.2	438.0	148.0	290.0	112.8	72.3	40.4
2016-17	113.1	39.6	73.5	409.7	127.7	282.0	113.4	62.0	51.4
2017-18	86.1	37.0	49.1	353.3	121.3	232.0	111.0	64.4	46.5
2018-19	120.6	38.2	82.5	512.0	117.0	395.0	113.6	59.7	53.9
2019-20[d]	115.9	41.5	74.4	391.0	122.0	269.0	62.0	39.9	22.0
2020-21	97.5	36.2	61.3	473.0	121.0	352.0	101.3	68.2	33.1
2021-22	76.1	31.1	45.1	359.7	112.3	247.4	112.6	59.9	52.7
2022-23	55.3	31.4	23.8	415.0	101.0	314.0	118.9	60.5	58.4
2023-24	61.3	29.4	31.9	378.0	113.4	264.6	121.1	64.6	56.4
2024-25	53.2	32.6	20.6	301.3	61.2	240.1	60.5	32.1	28.4
2025-26p[d]	58.0	30.8	27.2	352.9	60.0	292.9	28.4	15.1	13.4
2026-27f	47.1	26.8	20.3	323.2	60.0	263.2	37.0	19.6	17.4

p = preliminary.
f = Forecast (based on the USDA production forecast for 2026-27 season released on October 9, 2026).
[a] U.S. production estimates as reported by USDA-NASS Citrus Fruits Summary (*various issues)* and converted into 90-lb equiv. boxes; Brazil based on various Foreign Agricultural Service GAIN reports and Fundecitrus/CitrusBR. Mexico based on Foreign Agricultural Service, Official USDA Estimates as of September 2024.
[b] As of 2023, Brazil Production, based on the Brazil Citrus Season (July-June), is reported concurrently with the current Florida citrus season (October-September) to reflect total availability in the Florida citrus season.
[c] Weighted by utilized round oranges and specialty citrus used in OJ.
[d] 53-week season

Table 2. Utilization of Florida round oranges.

Season	Certified[a] Fresh	FCOJ[b]	SSOJ[b]	Certified[a] Processed	Non-Certified Fresh	Other[c]	Total
				million 90-lb boxes			
2007-08	4.42	80.80	85.11	163.83	1.43	1.27	170.20
2008-09[d]	5.54	72.58	82.81	155.13	1.38	1.56	162.50
2009-10	4.49	52.74	75.14	127.48	1.37	1.68	133.70
2010-11	4.48	51.75	82.69	134.09	1.48	0.13	140.50
2011-12	4.63	65.35	75.52	140.28	1.46	-0.26	146.70
2012-13	4.59	47.95	79.23	127.18	1.38	0.41	133.60
2013-14	4.15	22.72	76.03	98.88	1.35	0.44	104.70
2014-15 [d]	3.99	19.22	71.89	91.72	0.98	0.87	96.95
2015-16	3.07	15.84	61.85	77.60	0.92	0.10	81.70
2016-17	2.19	12.65	53.27	66.09	0.62	0.14	68.85
2017-18	2.33	7.66	34.36	42.26	0.43	0.27	45.05
2018-19	2.32	15.20	53.76	69.11	0.43	0.16	71.85
2019-20 [d]	2.98	14.15	49.85	64.18	0.25	0.18	67.30
2020-21	3.05	5.81	43.66	49.65	0.22	0.21	52.95
2021-22	2.45	4.19	34.36	38.62	0.15	0.07	41.05
2022-23	1.49	1.35	12.96	14.26	0.12	<0.00	15.82
2023-24	1.69	3.46	12.57	16.26	0.07	0.23	17.96
2024-25	1.00	3.85	7.16	11.16	0.07	0.15	12.20
2025-26p[d]	1.31	4.28	7.29	11.62	0.06	0.05	12.95
2026-27f	0.946	3.200	5.804	9.00	0.050	0.000	10.00

p = preliminary.
f = Forecast (based on the USDA production forecast for 2026-27 season released on October 9, 2026).
[a] Certified deliveries to Florida processors based on Florida Department of Agriculture and Consumer Services data.
[b] FCOJ and SSOJ utilization includes specialty boxes processed into orange juice; Florida reporting facilities (F.A.C. 20-3) only.
[c] FDACS certified processed utilization exceeds USDA final processed utilization.
[d] 53-week season

Table 3. Comparative utilization of round oranges, Florida, São Paulo, and Mexico.

Season	Florida			São Paulo[a]			Mexico[b]		
	Prod	Utilization		Prod	Utilization		Prod	Utilization	
		Fresh	Processed		Fresh	Processed		Fresh	Processed
	- million 90-lb equivalent boxes -								
2007-08	170.2	5.9	164.3	360.0	35.0	325.0	105.3	80.8	24.5
2008-09[d]	162.5	6.9	155.6	315.0	39.0	276.0	102.7	78.1	24.5
2009-10	133.7	5.9	127.8	320.0	46.0	274.0	99.2	77.6	21.6
2010-11	140.5	6.0	134.5	285.0	28.0	257.0	99.9	77.3	22.8
2011-12	146.7	6.1	140.6	444.0	40.7	403.3	89.8	69.9	20.3
2012-13	133.6	6.0	127.6	385.4	80.0	314.2	107.8	70.7	37.0
2013-14	104.7	5.5	99.2	290.0	50.0	240.0	111.0	81.1	29.4
2014-15[d]	97.0	5.1	91.8	309.0	60.1	248.9	110.6	72.2	38.0
2015-16	81.7	4.0	77.7	300.7	39.1	261.6	112.8	71.7	40.4
2016-17	68.9	2.8	66.0	245.3	59.7	185.6	113.4	60.6	51.4
2017-18	45.1	2.9	42.2	398.4	28.4	370.0	116.0	68.2	46.5
2018-19	71.9	3.0	68.8	286.0	49.2	236.8	115.5	60.9	53.9
2019-20[d]	67.3	2.9	64.4	386.8	61.7	325.1	62.0	39.1	22.0
2020-21	53.0	3.3	49.7	268.6	46.1	222.5	113.9	59.2	53.9
2021-22	41.2	2.6	38.6	263.0	38.6	224.4	112.6	58.6	52.7
2022-23	15.8	1.6	14.2	314.1	48.8	265.3	118.9	59.8	58.4
2023-24	18.0	1.8	16.2	307.2	46.1	261.1	121.1	64.6	56.4
2024-25	12.2	1.1	11.1	230.9	36.1	194.8	60.5	32.1	28.4
2025-26p[d]	13.0	1.4	11.6	292.9	36.0	256.9	28.4	15.1	13.4
2026-27f	10.0	1.0	9.0	263.2	36.0	227.2	37.0	19.6	17.4

p = preliminary.
f = Forecast (based on the USDA production forecast for 2026-27 season released on October 9, 2026).
[a] Based on USDA, FAS, "Brazil Citrus Semi-annual," GAIN report various issues and Fundecitrus updates. As of 2023, São Paulo production, based on the Brazil Citrus Season (July-June), is reported concurrently with the current Florida citrus season (October-September) to reflect total availability in the Florida citrus season. The harvest estimate includes the region of São Paulo and the West-Southwest Minas Gerais citrus belt.
[b] FAS Production, Supply and Demand database; 2023-24 and 2024-25 estimated using varous industry sources.
[c] Weighted by utilized round oranges and specialty citrus used in OJ.
[d] 53-week season.

Table 4. Comparative orange juice yields, Florida, Brazil, and Mexico.

	Florida[a]	São Paulo[b]	Mexico[c]
Season		SSE gal/box	
2007-08	6.61971	6.07673	5.79887
2008-09 [d]	6.59442	6.18843	5.96943
2009-10	6.23481	5.59156	5.68517
2010-11	6.35204	5.38623	5.58736
2011-12	6.52862	5.87744	5.68517
2012-13	6.38718	5.32859	5.68517
2013-14	6.22370	5.36539	5.96554
2014-15 [d]	5.93257	5.01416	5.83188
2015-16	5.67329	5.87939	5.70240
2016-17	5.82744	4.67900	5.68517
2017-18	5.57996	4.93765	5.83478
2018-19	5.71727	5.01665	5.42675
2019-20 [d]	5.69192	5.22540	5.68517
2020-21	5.33159	5.23140	5.68517
2021-22	4.89963	5.32177	5.68517
2022-23	4.71572	5.25063	3.33721
2023-24	4.72496	5.03954	3.47674
2024-25	4.79398	4.78756	4.62229
2025-26p[d]	4.93426	4.54818	4.62229
2026-27f	4.89559	4.32078	4.62229

p = preliminary.
f = Forecast (based on the USDA production forecast for 2026-27 season released on October 9, 2026).
[a] Source: FDOC Processors Statistics database.
[b] Source: CitrusBr
[c] Estimated juice yield in Mexico is calculated using USDA/FAS Production, Supply and Distribution (PSD) Datasets. The yield remains unchanged from 2019-20 to 2022-23 suggesting the reported yield is used to derive production estimates.
[d] 53-week season.

Table 5. Comparative orange juice production, Florida, São Paulo, and Mexico.

Season	Florida[a] (October - September)	São Paulo[b] (July - June)	Mexico[c] (October - September)	Total
		- million SSE gallons -		
2007-08	1,098.3	1,977.5	142.0	3,217.9
2008-09[d]	1,024.7	1,761.7	146.2	2,932.6
2009-10	797.3	1,699.0	122.6	2,618.8
2010-11	854.0	1,538.8	127.3	2,520.1
2011-12	919.7	2,147.9	115.6	3,183.2
2012-13	812.3	1,685.5	210.3	2,708.1
2013-14	614.6	1,201.2	175.4	1,991.2
2014-15[d]	540.5	1,461.0	221.4	2,223.0
2015-16	440.8	1,222.8	230.5	1,894.0
2016-17	384.1	916.1	292.4	1,592.7
2017-18	234.5	1,956.1	264.6	2,455.2
2018-19	394.3	1,242.7	306.4	1,943.3
2019-20[d]	364.3	1,699.6	125.3	2,189.2
2020-21	263.8	1,185.1	306.4	1,755.2
2021-22	188.9	1,161.7	299.4	1,650.0
2022-23	67.5	1,337.0	195.0	1,599.4
2023-24	75.7	1,350.1	196.2	1,622.1
2024-25	52.8	981.7	120.5	1,155.0
2025-26p[d]	57.1	1,294.9	88.6	1,440.6
2026-27f	44.1	1,087.5	115.1	1,246.7

p = preliminary.
f = Forecast (based on the USDA production forecast for 2026-27 season released on October 9, 2026).
[a] Source: Florida Department of Citrus Processor Database.
[b] Source: Brazilian Association of Citrus Exporters (CitrusBR)
[c] Estimated juice yield in Mexico is calculated using USDA/FAS Production, Supply and Distribution (PSD) Datasets.
[d] 53-week season.

Table 6. Total Florida, Brazil, and Mexico OJ availability

Season	Florida[a]		Brazil[b]		Mexico[c]		Total			
	Beg. Inv.	Prod.	Beg. Inv.	Prod.	Beg. Inv.	Prod.	Beg. Inv.	Prod.	Avail	Avail Change
	- million SSE gallons -									- % -
2007-08	363.06	1,107.55	20.89	1,977.51	1.39	142.05	385.34	3,227.11	3,612.45	9.21%
2008-09 [d]	624.16	1,034.74	231.17	1,761.66	2.79	146.22	858.12	2,942.62	3,800.75	5.21%
2009-10	672.93	806.07	239.53	1,698.99	2.79	122.55	915.25	2,627.61	3,542.86	-6.79%
2010-11	548.46	863.71	178.25	1,538.84	2.79	127.28	729.50	2,529.83	3,259.34	-8.00%
2011-12	391.23	928.39	303.12	2,147.86	2.79	115.59	697.14	3,191.83	3,888.97	19.32%
2012-13	433.56	820.90	936.70	1,685.48	-	210.28	1,370.26	2,716.66	4,086.92	5.09%
2013-14	523.57	622.41	1,083.01	1,201.17	2.29	175.36	1,608.87	1,998.93	3,607.80	-11.72%
2014-15 [d]	473.95	547.24	755.82	1,460.99	1.27	221.43	1,231.04	2,229.66	3,460.70	-4.08%
2015-16	503.16	443.59	721.69	1,222.77	2.39	230.48	1,227.24	1,896.84	3,124.07	-9.73%
2016-17	409.89	387.41	497.11	916.12	2.37	292.45	909.37	1,595.98	2,505.35	-19.80%
2017-18	368.28	236.73	151.84	1,956.07	1.67	264.60	521.80	2,457.40	2,979.20	18.91%
2018-19	357.31	396.47	484.95	1,242.68	2.79	306.38	845.05	1,945.53	2,790.57	-6.33%
2019-20 [d]	517.69	366.60	358.00	1,699.63	27.85	125.34	903.54	2,191.57	3,095.11	10.91%
2020-21	397.78	265.55	666.19	1,185.09	2.79	306.38	1,066.75	1,757.02	2,823.77	-8.77%
2021-22	347.20	189.64	448.14	1,161.74	2.79	299.41	798.12	1,650.79	2,448.91	-13.28%
2022-23	212.95	67.78	202.35	1,336.97	2.79	194.97	418.09	1,599.72	2,017.80	-17.60%
2023-24	184.10	77.38	119.83	1,350.12	2.79	196.22	306.71	1,623.72	1,930.43	-4.33%
2024-25	165.65	54.21	165.01	981.72	2.79	120.53	333.45	1,156.46	1,489.91	-22.82%
2025-26p[d]	194.86	58.13	206.87	1,294.88	2.79	88.57	404.51	1,441.58	1,846.09	23.91%
2026-27f	259.10	44.08	206.87	1,087.49	2.79	115.13	468.75	1,246.71	1,715.46	-7.08%

p = preliminary.
f = Forecast (based on the USDA production forecast for 2026-27 season released on October 9, 2026).
[a] Source: Florida Department of Citrus Processor Database.
[b] Source: Brazilian Association of Citrus Exporters (CitrusBR).
[c] Source: USDA/FAS Production, Supply and Distribution (PSD) Datasets for Mexico; forecast applied to PSD data using industry source projections.
[d] 53-week season.

Table 7. Brazil orange juice exports to select regions.

Season	USMCA Concentrate	USMCA NFC	USMCA **Total**	Europe Concentrate	Europe NFC	Europe **Total**	East Asia Total	All Else Total	**Total**
Jul - Jun				- million SSE gallons -					
2007-08	274.35	72.80	347.15	1,051.31	157.51	1,208.83	164.23	92.22	1,812.43
2008-09 [d]	147.29	59.26	206.55	1,150.97	173.89	1,324.86	161.44	91.39	1,784.24
2009-10	200.57	60.39	260.96	1,085.01	167.50	1,252.51	189.07	89.16	1,791.70
2010-11	86.28	73.06	159.34	978.55	197.67	1,176.22	227.75	80.34	1,643.65
2011-12	149.29	67.38	216.68	970.30	173.15	1,143.45	174.90	84.96	1,619.99
2012-13	222.31	69.51	291.82	929.34	214.98	1,144.32	146.16	77.72	1,660.02
2013-14	252.62	48.96	301.58	804.02	213.92	1,017.94	135.34	84.86	1,539.71
2014-15 [d]	261.06	83.43	344.50	884.95	210.27	1,095.22	144.98	91.79	1,676.49
2015-16	191.39	88.13	279.52	898.24	228.44	1,126.68	124.76	81.90	1,612.86
2016-17	144.04	101.30	245.34	652.13	234.23	886.36	113.50	96.19	1,341.39
2017-18	290.29	154.93	445.23	806.54	228.19	1,034.74	151.06	86.68	1,717.70
2018-19	126.29	150.72	277.00	684.16	230.21	914.37	120.66	73.21	1,385.25
2019-20 [d]	134.80	111.39	246.19	840.00	234.84	1,074.85	150.74	67.86	1,539.64
2020-21	155.75	135.73	291.48	712.62	255.72	968.34	144.10	83.66	1,487.58
2021-22	121.47	161.68	283.14	669.91	219.27	889.18	164.33	74.41	1,411.06
2022-23	193.86	250.54	444.40	528.28	188.07	716.35	147.40	55.09	1,363.25
2023-24	174.03	277.92	451.94	535.27	211.24	746.50	165.85	51.36	1,415.66
2024-25	170.51	266.25	436.77	390.20	164.83	555.04	76.03	26.12	1,093.96
2025-26 [a]	201.56	305.92	507.48	359.61	180.01	539.61	61.17	28.44	1,136.70
2026-27est	173.73	263.67	437.40	309.95	155.15	465.09	52.72	24.51	979.73

Source: FDOC-EMRD IMEX Database; Secretary of External Commerce – Brazil Comex Stat

[a] 53-week season.

Table 8. U.S. Imports orange juice, by origin and type.

FCOJ	2021-22	2022-23	2023-24	2024-25	2025-26Ytd
			- SSE gallons -		
Florida Ports	**173,965,975**	**157,474,289**	**197,891,284**	**222,585,539**	**172,934,448**
BRAZIL	32,850,373	69,958,251	79,800,432	155,070,865	123,335,727
MEXICO	114,011,642	63,722,006	99,177,756	53,695,732	21,716,817
COSTA RICA	25,786,273	22,379,546	16,956,870	10,810,046	24,756,219
BELIZE	102,830	2,839	20,060	0	0
Rest of World	1,214,857	1,411,648	1,936,166	3,008,896	3,125,685
Rest of US	**81,021,023**	**114,532,126**	**76,440,711**	**59,550,107**	**54,108,065**
BRAZIL	62,470,380	96,450,331	57,142,127	29,842,469	34,809,690
MEXICO	12,876,488	8,180,696	11,942,742	14,537,613	6,956,175
COSTA RICA	1,282,144	609,486	217,145	1,790,396	1,528,362
BELIZE	0	1380	0	0	0
Rest of World	4,392,011	9,290,234	7,138,697	13,379,630	10,813,838
FCOJ Total	**254,986,998**	**272,006,415**	**274,331,995**	**282,135,647**	**227,042,512**

NFC-OJ	2021-22	2022-23	2023-24	2024-25	2025-26Ytd
Florida Ports	**129,286,281**	**242,617,177**	**220,941,030**	**211,772,565**	**206,824,243**
BRAZIL	108,008,020	224,970,070	207,544,129	200,240,900	194,992,820
MEXICO	20,918,720	17,034,574	12,808,124	10,067,587	10,506,454
Rest of World	359,540	612,533	588,777	1,464,077	1,324,969
Rest of US	**57,488,619**	**53,858,368**	**58,399,183**	**66,580,639**	**58,255,805**
BRAZIL	39,093,907	39,807,111	42,490,027	49,329,804	43,024,392
MEXICO	16,616,898	12,598,967	14,312,610	15,089,168	12,409,643
Rest of World	1,765,847	1,352,875	1,414,675	2,123,122	2,821,770
NFC-OJ Total	**186,774,900**	**296,475,545**	**279,340,213**	**278,353,204**	**265,080,048**

Source: FDOC-EMRD IMEX Database; U.S. Department of Commerce. 2025-26Ytd – October 2025 through August 2026.

Table 9. Total Florida forecasted OJ availability, movement, and carryover for 2026-27 and actual for 2024-25 and 2025-26.

Item[a]	2024-25	2025-26p[f]	2026-27f		
			Low[b]	Mid	High[c]
	- million 11.8° Brix gallons -				
Beginning Inventory[a]	165.65	194.86	259.10	259.10	259.10
Production[a]	54.12	58.13	44.08	44.08	44.08
Imports[d]	424.84	416.76	349.85	388.73	427.60
Other adjustments[e]	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	485.84	447.73	426.28	426.28	426.28
Export	0.76	0.65	0.65	0.65	0.65
Ending Inventory	194.86	259.10	263.44	302.31	341.18
			- weeks supply -		
Carryover	20.8	30.6	32.1	36.8	41.6

p = preliminary.
f = Forecast (based on the USDA production forecast for 2026-27 season released on October 9, 2026).
[a] Based on data reported by Florida Citrus processors' statistics; October-September season.
[b] Projected Florida imports 10% less than middle scenario.
[c] Projected Florida imports 10% more than middle scenario.
[d] Foreign and domestic; Includes production by Florida Citrus processors' statistics members and an estimate of other Florida production by non-members.
[e] Reprocessed tangerine juice; net loss/gain during reprocessing; and adjustments.
[f] 53-week season

Table 10. Florida FCOJ forecasted availability, movement, and carryover for 2026-27 and actual for 2024-25 and 2025-26.

Item	2023-24	2024-25	2025-26p[d]	2026-27f
FCOJ		- million SSE gallons -		
Beginning Inventory	68.40	71.86	120.88	166.77
Pack	16.25	17.83	21.14	15.59
Other Sources	230.20	249.76	206.32	169.23
Imports	214.12	226.57	184.98	147.98
FCTJ	3.37	4.68	3.38	3.08
Evap	11.10	18.73	18.94	18.95
Net loss/gain	1.61	-0.21	(0.97)	(0.78)
Total FCOJ Availability	314.85	339.15	348.35	351.59
Total FCOJ Movement	243.42	218.26	181.81	165.89
By Form				
Retail	6.54	5.20	4.52	4.06
Institutional	43.69	41.21	44.40	39.96
Bulk	193.19	171.86	132.90	121.87
By Market				
Domestic	236.37	217.77	181.47	165.56
Export	7.05	0.49	0.34	0.34
Ending Inventory	71.86	120.88	166.77	185.70
		- weeks supply -		
Carryover	15.4	28.8	48.6	58.2

p = preliminary based on Florida Processor FCOJ Data.
f = Forecast (based on the USDA production forecast for 2026-27 season released on October 9, 2026).
[a] Includes pack from specialty fruit.
[b] Domestic receipts by members of non-Florida products; Florida product received by members from non-members; foreign imports; reprocessed frozen concentrated tangerine juice; chilled OJ used in FCOJ, net loss or gain during reprocessing; and adjustments.
[c] Forecasted imports, FCTJ, Evap and Net loss/gain adjustments combined in October 2020 Florida Citrus Outlook.
[d] 53-week season
Data source: FDOC Florida Citrus processors' statistics database.

Table 11. Florida SSOJ forecasted availability, movement, and carryover for 2026-27 and actual for 2024-25 and 2025-26

Item[a]	2023-24	2024-25	2025-26p[e]	2026-27f
SSOJ	---------- million SSE gallons ----------			
Beginning Inventory	115.70	93.80	73.97	92.33
Pack From Fruit	59.49	34.97	35.97	28.49
Other Sources	218.04	213.55	248.95	256.83
Imports[b]	200.33	198.27	231.78	240.75
Recon[c]	33.78	38.61	39.27	37.78
Net loss/gain	(16.07)	(23.34)	(22.10)	(21.70)
Total SSOJ Availability	393.23	342.31	358.90	377.65
Total SSOJ Movement	299.44	268.34	266.56	261.03
By Form				
Packaged	279.86	258.57	250.85	244.83
Bulk	19.58	9.77	15.71	16.20
NFC By Market				
Domestic	298.92	268.07	266.25	260.73
Export	0.52	0.27	0.31	0.31
Ending Inventory	93.80	73.97	92.33	116.61
Bulk Ending Inventory[d]	89.77	68.49	86.88	111.80
	---------- weeks supply ----------			
Carryover	16.3	14.3	18.4	23.2
Bulk Carryover[d]	15.6	13.3	17.3	22.3

p = preliminary.
f = Forecast (based on the USDA production forecast for 2026-27 season released on October 9, 2026).
Source: Florida Citrus processors' statistics.
[a] Availability, movement and inventory adjusted by Florida Citrus processors' statistics to 11.8° Brix gallons.
[b] Includes supplies from non-member sources and adjustments.
[c] Assumes RECON movement equals pack from FCOJ.
[d] Assumes bulk inventories are NFC.
[e] 53-week season,

Table 12. U.S. orange juice supply and disappearance.

Season	Beginning Inventory[a]	Total U.S. Production[b]	United States		Ending Inventory	Disappearance	
			Imports[c]	Exports[c,d]		TOTAL	Per Capita
	- millions SSE gallons -						gallons
2007-08	651.4	1,171.6	405.5	138.7	1,161.8	927.9	3.1
2008-09[g]	1,161.8	1,066.8	317.4	124.7	1,188.3	1,233.0	4.1
2009-10	1,188.3	846.8	327.6	146.7	1,005.7	1,210.3	4.0
2010-11	1,005.7	920.2	265.2	214.2	657.7	1,319.1	4.4
2011-12	657.7	966.9	223.3	151.7	730.3	966.0	3.2
2012-13	730.3	850.7	420.5	169.4	856.2	975.8	3.2
2013-14	856.2	664.4	417.6	160.0	782.5	995.8	3.2
2014-15[g]	782.5	590.3	458.4	113.1	525.0	1,193.0	3.8
2015-16	525.0	504.0	390.1	91.6	436.8	890.7	2.8
2016-17	436.8	420.5	416.8	72.1	378.2	823.8	2.6
2017-18	378.2	268.6	581.3	44.8	364.8	818.5	2.6
2018-19	364.8	456.0	481.8	41.9	528.2	732.5	2.3
2019-20[eg]	528.2	408.7	292.2	47.8	415.9	765.4	2.4
2020-21[f]	421.8	316.0	393.8	43.1	371.9	716.5	2.2
2021-22	371.9	219.2	440.6	42.2	234.9	754.6	2.3
2022-23	234.9	110.0	567.8	32.4	203.6	676.7	2.0
2023-24	203.6	145.2	553.7	35.9	186.9	679.6	2.0
2024-25	186.9	94.9	560.6	37.1	213.7	591.6	1.7
2025-26p[g]	213.7	125.1	539.9	29.9	278.9	569.9	1.7
2026-27f	278.9	105.2	501.6	29.5	297.5	558.7	1.6

p = preliminary.
f = Forecast (based on the USDA production forecast for 2026-27 season released on October 9, 2026).
[a] Based on FCOJ inventories for the United States (National Agricultural Statistics Service, Cold Storage Reports) plus Florida SSOJ inventories (FCPS); in 2003-04 and prior years based on Florida FCOJ and SSOJ inventories (adjusted to 11.8° Brix gallons).
[b] OJ production from TX and CA estimated using USDA estimates, Florida production includes estimate from non-reporting processor members.
[c] U.S. Department of Commerce. Actual prior to 2023-24. Projected for September 2023-24 season.
[d] FDOC processor statistics reporting exports which exceeded the volume reported by the U.S. Department of Commerce.
[e] Ending inventories for a 53-week season.
[f] Adjustment to non-Florida cold storage is reflected in season 2020-21 and forward. [g] 53-week season

Table 13. Florida processor OJ receipts, movement, and inventory, by type.

Season	Net from Florida Fruit[a]	Imports and Other Receipts[b,c]	Domestic Packaged Movement	Domestic Bulk Movement	All exports	Net change in inventory
	---------- million SSE gallons ----------					
FCOJ						
2017-18	42.16	304.46	64.35	214.88	15.69	51.70
2018-19	87.03	295.82	63.56	225.57	18.98	74.75
2019-20[d]	82.04	164.78	54.17	237.55	15.16	(60.06)
2020-21	31.38	220.71	54.67	199.59	21.99	(24.16)
2021-22	20.28	190.49	61.25	233.64	19.31	(103.43)
2022-23	6.27	188.78	54.33	191.48	2.73	(53.48)
2023-24	17.89	230.20	50.23	186.14	7.05	4.67
2024-25	19.24	249.76	46.41	171.37	0.49	50.73
2025-26p[d]	22.08	206.83	50.04	136.65	0.34	41.88
2026-27f	16.56	169.50	45.04	125.62	0.34	15.07
SSOJ						
2017-18	194.56	100.04	328.96	24.13	1.97	(60.46)
2018-19	309.44	110.30	318.16	17.30	2.21	82.06
2019-20[d]	284.57	36.01	352.16	23.46	2.60	(57.64)
2020-21	234.40	98.48	343.61	11.73	1.90	(24.36)
2021-22	169.14	145.26	333.57	9.25	1.85	(30.26)
2022-23	61.51	287.62	307.59	15.76	0.85	24.94
2023-24	59.49	218.04	279.86	19.06	0.52	(21.90)
2024-25	34.97	213.55	258.36	9.71	0.27	(19.82)
2025-26p[d]	36.05	250.44	255.03	12.78	0.31	18.36
2026-27f	28.49	257.45	246.35	16.20	0.31	23.07

p = preliminary.

f = Forecast (based on the USDA production forecast for 2026-27 season released on October 9, 2026).

[a] FCOJ includes an estimate of non-reporting processor pound solids.

[b] FCOJ other receipts includes net loss/gain in production, evaporated SSOJ, and concentrated tangerine juice used in FCOJ.

[c] SSOJ other receipts includes net loss/gain in production, reconned FCOJ used in SSOJ, and is less evaporated SSOJ

[d] 53-week season.

Florida Department of Citrus; processor database.

Table 14. Retail orange juice sales.

Season	NFC	RECON	FCOJ	Other	TOTAL
Volume[b]					
	---------- million SSE gallons ----------				
2017-18	254.41	136.90	16.36	12.17	419.83
2018-19	231.00	135.96	14.72	12.56	394.24
2019-20	263.52	150.92	17.90	13.09	445.43
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
2026-27f					
High Price	177.3	65.3	6.9	4.0	253.5
Mid Price	184.7	68.0	7.2	4.2	264.1
Low Price	192.0	70.7	7.5	4.4	274.6

Price[b]					
	---------- $ per SSE gallon ----------				
2017-18	7.92	4.97	5.07	7.45	6.83
2018-19	8.40	4.88	5.06	7.42	7.03
2019-20	8.62	4.86	5.13	7.31	7.17
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
2026-27f					
High Price	13.97	10.09	8.93	13.08	12.82
Mid Price	12.92	9.40	8.55	12.57	11.89
Low Price	12.90	9.31	8.24	12.07	11.83

p = preliminary.
f = Forecast (based on the USDA production forecast for 2026-27 season released on October 9, 2026).
[a] Based on an analysis of trends to estimate remaining two periods for the season. Nothing herein is meant to imply minimum pricing, nor FDOC staff opinion on optimal pricing.
[b] Data source: Nielsen Answers on Demand, Expanded All Outlets Combined; FDOC Custom database. Grocery stores $2 million+, mass merchandisers, Walmart discount stores and supercenters, club stores, dollar stores, drug stores $1 million+, and military/Defense Commissary Agency (DeCA).
[c] Routine maintenance of the FDOC Custom database revealed several items (UPCs) were categorized as Recon OJ instead of shelf stable OJ. The database was refreshed in January 2019 altering the totals for the 2017-18 season forward.

Table 15. Share of 100% orange juice sold on promotion with reported price, by type

Season	2022-23	2023-24	2024-25	2025-26
Share - Any Promo[a]	---------- % of total sales ----------			
NFC	28.9%	29.5%	22.2%	28.9%
RECON	24.5%	22.1%	23.1%	30.3%
TOTAL	26.0%	26.0%	21.7%	28.4%
Share - No Promo	---------- % of total sales ----------			
NFC	71.1%	70.5%	77.8%	71.1%
RECON	75.5%	77.9%	76.9%	69.7%
TOTAL	74.0%	74.0%	78.3%	71.6%
Any Promo Price	---------- $ per SSE gallon ----------			
NFC	$9.36	$9.44	$10.61	$11.31
RECON	$6.50	$7.42	$8.57	$8.76
TOTAL	$8.25	$8.87	$9.96	$10.56
No Promo Price	---------- $ per SSE gallon ----------			
NFC	$10.75	$10.88	$12.29	$13.54
RECON	$6.92	$8.12	$9.63	$9.76
TOTAL	$9.00	$9.83	$11.37	$12.34

[a]Share sold on promotion include feature items, display items, a combination of both feature and display, and temporary price reductions (also known as price decrease). Information is reported for informational purposes. Outlook projections of retail sales are not disaggregated by promotional activity.
Data source: Nielsen Answers on Demand, Expanded All Outlets Combined; FDOC Custom database.

Table 16. Destination markets for Florida certified fresh orange shipments.

Season (Aug-July)	Exports		Domestic				TOTAL[b]	
	Overseas[a]	Canada	South	Northeast	Central	West		
	---------- million 45-pound cartons ----------							90-lb boxes
2007-08	0.28	0.49	3.91	2.91	0.97	0.01	8.58	4.29
2008-09[c]	0.25	0.59	4.69	3.97	1.30	0.02	10.83	5.41
2009-10	0.19	0.55	3.83	3.17	0.95	0.03	8.73	4.36
2010-11	0.14	0.55	3.70	3.22	1.03	0.04	8.69	4.35
2011-12	0.09	0.51	3.93	3.27	1.22	0.06	9.08	4.54
2012-13	0.12	0.57	3.92	3.16	1.21	0.04	9.02	4.51
2013-14	0.12	0.53	3.35	2.81	1.28	0.03	8.13	4.06
2014-15[c]	0.06	0.65	3.09	2.68	1.33	0.03	7.83	3.92
2015-16	0.13	0.50	2.29	1.97	1.10	0.02	6.02	3.01
2016-17	0.03	0.39	1.51	1.61	0.82	0.02	4.38	2.19
2017-18	0.02	0.34	1.64	1.57	1.05	0.05	4.67	2.33
2018-19	0.04	0.27	1.54	1.66	1.08	0.04	4.63	2.32
2019-20[c]	0.02	0.24	2.38	2.00	1.27	0.04	5.96	2.98
2020-21	0.03	0.19	2.66	1.74	1.27	0.21	6.09	3.05
2021-22	0.02	0.15	1.96	1.47	1.23	0.06	4.89	2.45
2022-23	0.01	0.09	1.14	0.92	0.79	0.03	2.98	1.49
2023-24	0.01	0.12	1.48	0.93	0.70	0.13	3.37	1.69
2024-25	0.010	0.023	0.878	0.606	0.461	0.016	1.995	0.998
2025-26p[c]	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

p = preliminary.
f = Forecast (based on the USDA production forecast for 2026-27 season released on October 9, 2026).
Source: Division of Fruit and Vegetable Inspection Service, Florida Department of Agriculture.
a Includes some offshore exports not destined for Europe.
b May not add up due to rounding.
[c] 53-week season.

Table 17. Utilization of Florida grapefruit.

Season	Volume					
	Fresh	FCGJ	SSGJ	Non-Certified	Other	TOTAL
	---------- million 85-lb boxes ----------					
2007-08	9.915	10.458	5.197	0.708	0.322	26.600
2008-09[a]	8.677	8.428	3.702	0.662	0.231	21.700
2009-10	8.710	6.047	4.589	0.647	0.307	20.300
2010-11	7.728	6.967	4.176	0.651	0.228	19.750
2011-12	7.246	6.873	3.830	0.683	0.218	18.850
2012-13	7.136	6.103	4.232	0.607	0.272	18.350
2013-14	6.054	4.733	4.048	0.636	0.179	15.650
2014-15 [a]	5.274	3.835	3.158	0.434	0.199	12.900
2015-16	4.536	2.770	3.067	0.410	0.018	10.800
2016-17	3.246	1.814	2.363	0.291	0.047	7.760
2017-18	1.620	0.556	1.556	0.124	0.025	3.880
2018-19	1.786	0.602	1.976	0.135	0.011	4.510
2019-20 [a]	2.044	0.471	2.242	0.093	0.000	4.850
2020-21	1.889	0.309	1.791	0.098	0.013	4.100
2021-22	1.759	0.200	1.327	0.067	(0.022)	3.330
2022-23	1.037	-	0.683	0.030	0.060	1.810
2023-24	1.171	-	0.585	0.030	0.004	1.790
2024-25	0.872	0.002	0.375	0.017	0.034	1.300
2025-26p[a]	0.780	-	0.519	0.031	0.020	1.350
2026-27f	0.826	-	0.443	0.030	<0.000	1.300

p = preliminary.
f = Forecast (based on the USDA production forecast for 2026-27 season released on October 9, 2026).
[a] 53-week season,

Table 18. Florida FCGJ and SSGF availability, movement, and carryover for 2026-27, and actual for 2023-24 through 2025-26.

Item	2023-24	2024-25	2025-26p[g]	2026-27f
FCGJ		--- million SSE gallons ---		
Beginning Inventory	3.37	2.30	1.62	0.75
Pack From Fruit	--	0.01	--	--
Imports and other adjustments[a]	0.72	0.45	0.39	1.02
Total FCGJ Availability	4.10	2.75	2.01	1.77
Movement	1.88	1.14	1.26	1.19
Ending Inventory	2.30	1.62	0.75	0.58
Carryover (weeks supply)	63.4	74.0	31.3	29.5
SSGJ[c]		--- Million SSE gallons ---		
Beginning Inventory	6.20	4.28	3.30	3.67
Pack from Fruit[a]	3.03	2.10	3.18	2.22
Imports/Dom Receipts[b]	4.98	5.68	5.68	6.50
Total SSGJ Availability	14.32	12.06	12.16	12.40
Movement – Domestic	10.19	8.96	8.43	8.40
Movement– Exports[d,e]	0.18	0.15	0.13	0.14
Total SSGJ Movement	10.21	8.96	8.50	8.43
Bulk Ending Inventory	4.13	3.15	3.54	3.81
		--- Weeks supply ---		
Bulk Carryover[f]	22.3	19.6	22.9	24.4
TOTAL GJ				
Beginning Inventory	9.58	6.57	4.92	4.41
Production and Imports[a]	7.92	6.94	7.73	8.87
Total GJ Availability	17.50	13.51	12.65	13.28
Movement- Domestic	12.04	10.00	9.65	9.56
Movement- Export	0.03	0.10	0.04	0.03
Total GJ Movement	12.07	10.10	9.69	9.59
Bulk Ending Inventory	6.45	4.77	4.27	3.69
		--- Weeks supply ---		
Carryover	27.8	24.5	23.4	20.0

p = preliminary. f = Forecast (based on the USDA production forecast for 2026-27 season released on October 9, 2026).
Source: FDOC Florida Citrus processors' statistics database.

[a] Includes adjustments and pack from reprocessed FCGJ.

[b] Includes domestic receipts of non-Florida product, receipts of Florida product from non-member processors, and receipts from foreign sources

[c] Availability, movement and inventory adjusted by FCPS to 10.0° Brix gallons.

[d] Rounds to zero on FPS Weekly Report.

[e] Assumes RECON movement equals pack from FCGJ.

[f] Includes packaged.

[g] 53-week season.

Table 19. U.S. grapefruit juice production, supply, and disappearance.

Season	United States[a]					Disappearance	
	Beg Inv	Prod[b]	Imports	Exports[c,d]	End Inv	TOTAL	Per Capita
	Million SSE gallons						
2007-08	62.6	113.9	0.3	40.5	64.9	71.4	0.23
2008-09[e]	64.9	88.3	0.5	37.1	50.4	66.1	0.22
2009-10	50.4	82.0	0.6	24.7	45.8	62.5	0.20
2010-11	45.8	87.3	0.4	32.8	35.6	65.1	0.21
2011-12	35.6	81.7	0.5	23.8	39.5	54.5	0.17
2012-13	39.5	78.5	0.8	22.7	36.8	59.3	0.19
2013-14	36.8	67.1	0.3	18.2	35.9	50.1	0.16
2014-15[e]	35.9	51.6	0.4	16.0	29.7	42.2	0.13
2015-16	29.7	45.8	0.8	11.1	27.7	37.6	0.12
2016-17	27.7	37.9	2.8	8.6	21.0	38.7	0.12
2017-18	21.0	23.7	6.7	6.8	14.0	30.6	0.09
2018-19	14.0	38.9	12.3	5.9	17.8	41.5	0.13
2019-20[e]	17.8	30.3	5.0	5.0	19.5	28.7	0.09
2020-21[f]	19.5	18.4	2.7	4.9	23.5	18.9	0.06
2021-22	23.5	22.0	4.0	5.1	15.3	29.2	0.09
2022-23	15.3	14.3	8.6	3.6	10.5	24.0	0.07
2023-24	10.5	15.7	7.6	4.4	8.9	20.4	0.06
2024-25	8.89	12.06	5.66	4.03	6.07	16.50	0.05
2025-26p	6.07	14.97	5.09	3.87	6.72	15.54	0.05
2026-27f	6.72	15.76	4.68	3.50	8.00	15.65	0.05

p = preliminary.
f = Forecast (based on the USDA production forecast for 2026-27 season released on October 9, 2026).
[a] Estimated as U.S. production plus imports minus exports plus beginning inventory minus ending inventory. Prior to 2019-20 season, presumed consumption estimates may have inlcuded cold storage outside of Florida. As of 2021-22, estimates of non-Florida processor cold storage incorporated into beginning and ending inventory.
[b] GJ production from TX and CA estimated using USDA estimates, Florida production includes estimate from non-reporting processor members.
[c] U.S. Department of Commerce.
[d] FDOC processor statistics reporting exports which exceeded the volume reported by the U.S. Department of Commerce.
[e] Ending inventories for a 53-week season.

Table 20. Retail grapefruit juice sales.

Season	Refrig. NFC	Refrig. RECON	Shelf Stable	FCGJ/Other	TOTAL
Volume					
	----------million SSE gallons ----------				
2017-18[b]	9.01	0.47	3.76	0.09	13.34
2018-19[b,c]	8.46	0.10	2.99	0.39	11.95
2019-20 [b,c]	8.91	0.15	2.99	0.47	12.52
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[b]	7.43	0.18	2.77	0.31	10.70
2023-24[b]	6.96	0.18	2.83	0.02	9.99
2024-25[b]	6.33	0.22	2.71	0.01	9.27
2025-26p[b]	5.54	0.30	2.74	0.04	8.62
2026-27f					
High Price	5.13	0.30	2.14	0.04	7.61
Mid Price	5.24	0.30	2.19	0.04	7.81
Low Price	5.29	0.31	2.21	0.04	8.47
Price					
	---------- $ per SSE gallon ----------				
2017-18[b]	$8.35	$6.97	$6.22	$5.07	$7.68
2018-19[b,c]	8.95	16.32	6.79	$5.06	8.33
2019-20 [b,c]	9.27	18.16	7.41	$5.13	8.73
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[b]	10.60	21.95	9.05	$5.99	10.32
2023-24[b]	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
2026-27f					
High Price	13.72	25.13	10.07	8.60	13.12
Mid Price	13.19	24.16	9.69	8.27	12.53
Low Price	12.35	23.78	9.33	8.11	11.05

p = preliminary.
f = Forecast (based on the USDA production forecast for 2026-27 season released on October 9, 2026).
[a] Based on an analysis of trends. Nothing herein is meant to imply minimum pricing, nor FDOC staff opinion on optimal pricing.
[b] Data source: Nielsen Answers on Demand, Expanded All Outlets Combined; FDOC Custom database. Grocery stores $2 million+, mass merchandisers, Walmart discount stores and supercenters, club stores, dollar stores, drug stores $1 million+, and military/Defense Commissary Agency (DeCA).
[c] One or more refrigerated recon products, as indicated by UPCs in the FDOC custom databse, were confirmed as discontinued leading to a significant drop in volume for the category. The volume remaining recon products reflects equivalent gallons of small container sizes which would indicate a significant increase in price.

Table 21. Share of 100% grapefruit juice sold on promotion with reported price, by type.

Season	2022-23	2023-24	2024-25	2025-26
Share - Any promo[a]	---------- % of total sales ----------			
NFC	31.6%	30.6%	30.3%	35.0%
RECON	9.1%	12.7%	11.2%	11.3%
TOTAL	25.4%	25.1%	24.2%	26.3%
Share - No Promo	---------- % of total sales ----------			
NFC	68.4%	69.4%	69.7%	65.0%
RECON	90.9%	87.3%	88.8%	88.7%
TOTAL	74.6%	74.9%	75.8%	73.7%
Any Promo Price	---------- $ per SSE gallon ----------			
NFC	$8.92	$9.54	$10.56	$10.74
RECON	$10.21	$10.24	$10.58	$11.27
TOTAL	$9.06	$9.73	$10.67	$10.94
No Promo Price	---------- $ per SSE gallon ----------			
NFC	$11.38	$11.94	$13.55	$14.30
RECON	$8.93	$8.82	$9.11	$9.02
TOTAL	$10.74	$11.19	$12.31	$12.67

[a] Share sold on promotion include feature items, display items, a combination of both feature and display, and temporary price reductions (also known as price decrease). Information is reported for informational purposes. Outlook projections of retail sales are not disaggregated by promotional activity.
Data source: Nielsen Answers on Demand, Expanded All Outlets Combined; FDOC Custom database.

Table 22. Destination markets for Florida certified fresh grapefruit.

Season (Aug-July)	Exports		Domestic				TOTAL[b]	
	Overseas[a]	Canada	South	Northeast	Central	West		
	---------- million 45-pound cartons ----------							Million 90-lb boxes
2007-08	12.495	1.163	1.878	2.941	1.177	0.169	19.822	9.911
2008-09	10.221	1.088	1.797	2.869	1.254	0.125	17.353	8.677
2009-10	10.162	1.151	1.886	2.919	1.180	0.123	17.420	8.710
2010-11	8.965	1.098	1.710	2.539	0.977	0.165	15.455	7.728
2011-12	7.971	0.992	1.694	2.608	1.094	0.133	14.491	7.246
2012-13	7.659	1.148	2.201	2.756	1.220	0.189	15.172	7.586
2013-14	6.074	1.105	2.019	2.552	1.067	0.123	12.939	6.470
2014-15	5.371	0.835	1.611	1.987	0.839	0.118	10.762	5.381
2015-16	5.143	0.718	1.446	1.848	0.675	0.102	9.933	4.967
2016-17	3.612	0.444	1.036	1.327	0.366	0.037	6.822	3.411
2017-18	1.508	0.221	0.625	0.748	0.127	0.011	3.241	1.620
2018-19	1.405	0.300	0.767	0.923	0.158	0.019	3.572	1.786
2019-20	1.545	0.315	0.959	1.056	0.185	0.027	4.087	2.043
2020-21	1.110	0.219	1.079	1.048	0.282	0.038	3.776	1.888
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	0.779
2026-27f	0.023	0.040	0.898	0.520	0.135	0.037	1.653	0.826

p = preliminary.
f = Forecast (based on the USDA production forecast for 2026-27 season released on October 9, 2026). Table has been revised to report regional shipments within the United States. Domestic fresh grapefruit movement was projected in January 2026 to reach 1.605 million cartons. Regional estimates were not reported under previous framework.
Source: Division of Fruit and Vegetable Inspection Service, Florida Department of Agriculture.
a Includes offshore exports destined for Europe and South Korea.

Table 23. Utilization of Florida fresh specialty.

Season	Fresh	Non-Certified	Processed	Total
	---------- million 90-pound boxes ----------			
2007-08	3.400	0.314	3.286	7.000
2008-09	2.992	0.349	1.659	5.000
2009-10	3.049	0.377	1.924	5.350
2010-11	3.051	0.399	2.350	5.800
2011-12	2.885	0.387	2.168	5.440
2012-13	2.380	0.305	1.595	4.280
2013-14	2.012	0.327	1.441	3.780
2014-15	1.734	0.184	1.562	3.480
2015-16	1.13	-	0.70	1.820
2016-17[b]	0.86	-	0.77	1.620
2017-18	0.43	0.05	0.26	0.750
2018-19	0.49	0.05	0.45	0.990
2019-20	0.57	0.07	0.38	1.020
2020-21	0.548	0.051	0.291	0.890
2021-22	0.438	0.046	0.266	0.750
2022-23	0.324	0.011	0.145	0.480
2023-24	0.305	0.024	0.121	0.450
2024-25	0.183	0.060	0.157	0.400
2025-26p	0.280	0.021	0.159	0.460
2026-27f	0.279	0.021	0.149	0.450

p = preliminary.
f = Forecast (based on the USDA production forecast for 2026-27 season released on October 9, 2026).
[a] Processed boxes are utilized for orange juice, except some tangerines utilized to 100% produce tangerine juice.
[b] Starting in the 2016-17 season, Royal tangerines (formerly Temple) reported with specialty.

Table 24. Destination markets for Florida certified fresh specialty shipments.

Season	Exports		Domestic				TOTAL[b]	
(Aug-July)	Overseas[a]	Canada	South	Northeast	Central	West		
	---------- million 45-pound cartons ----------							-- million 90-pound boxes--
2007-08	0.009	0.410	2.825	2.468	1.198	0.157	7.067	3.533
2008-09[c]	0.001	0.334	2.401	2.218	1.156	0.136	6.246	3.123
2009-10	0.053	0.331	2.448	1.967	0.953	0.596	6.348	3.174
2010-11	0.100	0.300	2.471	1.958	0.988	0.548	6.365	3.182
2011-12	0.039	0.240	2.422	1.815	0.890	0.545	5.952	2.976
2012-13	0.053	0.232	2.233	1.629	0.793	0.433	5.374	2.687
2013-14	0.032	0.161	1.743	1.383	0.633	0.410	4.361	2.181
2014-15[c]	0.032	0.132	1.542	1.207	0.488	0.260	3.662	1.831
2015-16	0.013	0.072	1.085	0.877	0.352	0.206	2.604	1.302
2016-17	0.016	0.045	0.776	0.638	0.210	0.141	1.827	0.914
2017-18	0.005	0.015	0.411	0.296	0.093	0.046	0.865	0.433
2018-19	0.008	0.027	0.478	0.311	0.091	0.065	0.978	0.489
2019-20[c]	0.008	0.030	0.575	0.313	0.105	0.110	1.140	0.570
2020-21	0.015	0.020	0.632	0.231	0.078	0.120	1.096	0.548
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[c]	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

p = preliminary.
f = Forecast (based on the USDA production forecast for 2026-27 season released on October 9, 2026).
Source: Division of Fruit and Vegetable Inspection Service, Florida Department of Agriculture.
[a] Includes some offshore exports not destined for Europe.
[b] May not add up due to rounding.
[c] 53-week season


Florida
Citrus™