



Florida Citrus Economic & Market Indicators

December, 2006

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Summary Comments

- Over the July through October period of the 2006-07 Brazilian season, ABECitrus FCOJ exports were down 10.3% from the previous season with exports to Europe, NAFTA countries and Asia down 13.3%, up 10.3% and down 42.1%, respectively.
- Season-to-date through 12/09/06, Florida OJ movement was down 5.8% from last season; pack from fruit was up 23.5%; imports and miscellaneous supplies were up 37.8%; and inventories were down 26.5%.
- For October, U.S. OJ imports and exports were up 31.2% and 15.4%, respectively. Season-to-date through 12/09/06, Florida OJ exports were down 23.4% (FCPA).
- For October, non-FCPA FCOJ disappearance, based on FCOJ inventories and imports, was down 76.0%.
- Season-to-date through 11/25/06, OJ volume sales in all ACNielsen retail outlets (U.S. grocery store chains doing \$2 million plus business, Wal-Mart stores excluding Sam's Clubs, mass merchandisers and drug stores doing \$1 million plus business) were down 10.2 % from the previous season, with the NFC price up 15.5%, the Recon price up 16.1%, the FCOJ price up 15.2%, and the overall OJ price up 16.0%.
- The November average FCOJ Futures price was \$1.98/PS, up \$.78/PS from last year. The Florida bulk FCOJ FOB price was \$2.12/PS for the week ending 11/25/06, up \$.85/PS from last year; while the Rotterdam price was at an estimated \$2,475/MT, up \$1,037/MT from last year.
- Season-to-date through 12/09/06, the delivered-in price for early & midseason oranges was \$1.82/PS, up \$.87/PS from last season; season-to-date delivered-in prices for white and red grapefruit juice were \$.75/PS and \$.66/PS, down \$1.08/PS and \$.87/PS from last season, respectively.
- Season-to-date through 12/10/06, fresh orange and specialty citrus shipments were up 10.4% from last season; domestic FOB prices for early/midseason & Temple oranges, Navel oranges and early tangerines were up 12.7%, 13.5% and .6%, respectively.
- Season-to-date, August through October, clementine/tangerine imports were up 4.4%. Season-to-date through 12/10/06, Texas fresh grapefruit shipments were down 12.9%.
- Season-to-date through 12/09/06, Florida GJ availability, movement and the ending inventory level were up 10.6%, 1.8% and 13.2% , respectively.
- For October, U.S. GJ exports were up 63.8%. Season-to-date through 12/09/06, Florida GJ exports were up 87.0% (FCPA).
- Season-to-date through 11/25/06, GJ volume sales in all ACNielsen retail outlets were down 4.9% from last season, with the NFC, Recon and overall prices up 5.0%, down 3.4% and up .4%, respectively.
- Season-to-date through 12/10/06, Florida fresh grapefruit shipments were up 83.8% from last season, with domestic/Canadian shipments up 31.8% and offshore shipments up 167.4% (CAC). Season-to-date through 11/26/06, certified shipments to Europe and Japan were up 261.4% and 232.1%, respectively. Season-to-date through 12/10/06, domestic FOB prices for Sunridge and Indian River fresh white and colored grapefruit were \$11.40/carton and \$10.54/carton, respectively.
- The Euro continues to be relatively strong; for the week ending 12/15/06 versus the same period last year, the Euro-per-Dollar was down 10.6%. The Yen has remained relatively stable.
- Specific OJ ad recall is down directionally vs. same time last year, though there were fewer TRPs this year. Recall of "Healthy, Pure, & Simple" is up vs. same time last year.
- Recent OJ purchases are up vs. same time last year.
- The proportion of frequent OJ users is up vs. same time last year; however, the proportion of moderate OJ users is down directionally.
- Key campaign element "provides important nutrients, vitamins, and/or minerals" is up directionally vs. same time last year.

Brazil Orange-Juice Exports

Country	Season (July-June)			Season-to-Date (July-October)		
	2005-06	2006-07	Change	2005-06	2006-07	Change
	- million SSE gallons -		- % -	- million SSE gallons -		- % -
Europe	1,234.2	1,229.0	-.4	456.9	396.3	-13.3
NAFTA	246.1	320.0	+30.0	86.9	95.9	+10.3
Asia	243.7	250.0	+2.6	83.4	48.3	-42.1
Mercosul	1.5	1.6	+5.0	.7	.4	-37.1
Others	171.7	140.4	-18.2	55.7	72.6	+30.3
TOTAL	1,897.2	1,941.0	+2.3	683.6	613.5	-10.3

SOURCE: ABECitrus.

Florida Orange-Juice Availability, Movement and Inventory

Item	Season (October-September)			Season-to-Date 12/09/06 (FCPA Week 10)		
	2005-06	2006-07e	Change	2005-06	2006-07	Change
	- million SSE gallons -		- % -	- million SSE gallons -		- % -
Beginning Inventory	602.8	446.3	-26.0	602.8	446.3	-26.0
Pack from Fruit^a	924.9	849.5	-8.2	53.1	65.5	+23.5
Imports^{a,b}	133.5	217.0	+62.5	31.2	43.0	+37.8
Availability	1,661.2	1,512.8	-8.9	687.1	554.9	-19.2
Movement	1,214.9	1,149.7	-5.4	239.7	225.8	-5.8
FCOJ ^c	622.0	576.7	-7.3	127.3	112.2	-11.9
NFC ^d	592.9	573.0	-3.4	112.4	113.6	+1.1
Ending Inventory	446.3	363.1	-18.6	447.4	329.0	-26.5
	- - weeks supply - -		- % -	- - weeks supply - -		- % -
Carryover – STD^e	19.1	16.4	-14.0	18.7	14.6	-21.9
Carryover – 13 Weeks^f				17.9	13.6	-24.2
Carryover – 3 Years^g				17.9	13.2	-26.5

^aFCPA non-member Florida product included in pack from fruit for season data but included in imports for season-to-date data.

^bAlso includes domestic receipts by members of non-Florida product, foreign imports, reprocessed tangerine juice, net loss or gain during reprocessing and adjustments.

^cExcludes COJ used in FCOJ.

^dExcludes movement of reconstituted chilled orange juice.

^eSeason-to-date weeks supply based on season-to-date movement.

^fSeason-to-date weeks supply based on last 13-week movement.

^gSeason-to-date weeks supply based on last 3-year movement.

U.S. Orange-Juice Imports^a

Country	October		
	2005-06	2006-07	Change
	- - - million SSE gallons - - -		- % -
Brazil	12.35	19.54	+58.2
CBI	.34	.27	-20.6
Mexico	4.51	3.21	-28.8
Other	.88	.71	-19.3
TOTAL	18.08	23.72	+31.2

^aIncludes OJ with added vitamins and minerals.
 SOURCE: U.S. Department of Commerce.

Non-FCPA FCOJ Disappearance Index

Item	October		
	2005-06	2006-07	Change
	- million SSE gallons -		- % -
Beginning Inventory^a	72.1	45.4	-37.0
Foreign Imports^b	<u>6.1</u>	<u>11.8</u>	<u>+94.4</u>
Availability^c	78.2	57.2	-26.8
Ending Inventory^a	<u>67.9</u>	<u>54.8</u>	<u>-19.4</u>
Non-FCPA FCOJ Disappearance^d	10.2	2.5	-76.0

^aNational Agricultural Statistics Service (NASS), U.S. FCOJ cold storage minus FCPA, FCOJ inventory, as reported in NASS-USDA, "Cold Storage" reports and FCPA weekly reports.

^bU.S. Department of Commerce, FCOJ imports (excludes bonded product) minus FCPA, FCOJ foreign product imported by members (includes bonded product).

^cBeginning inventory and imports.

^dPartial measure of non-Florida presumed consumption. Omits non-Florida, U.S. production and exports.

U.S. Orange-Juice Exports^a

Country	October		
	2005-06	2006-07	Change
	- - - million SSE gallons - - -		- % -
Canada	4.50	5.07	+12.7
Europe	.98	1.04	+6.1
Japan	.17	.22	+29.4
Other	1.05	1.41	+34.3
TOTAL	6.71	7.74	+15.4^b

^aIncludes OJ with added vitamins and minerals.

^bFPCA exports of OJ for the 2006-07 season were down 23.4%, season-to-date through 12/09/06.

SOURCE: U.S. Department of Commerce.

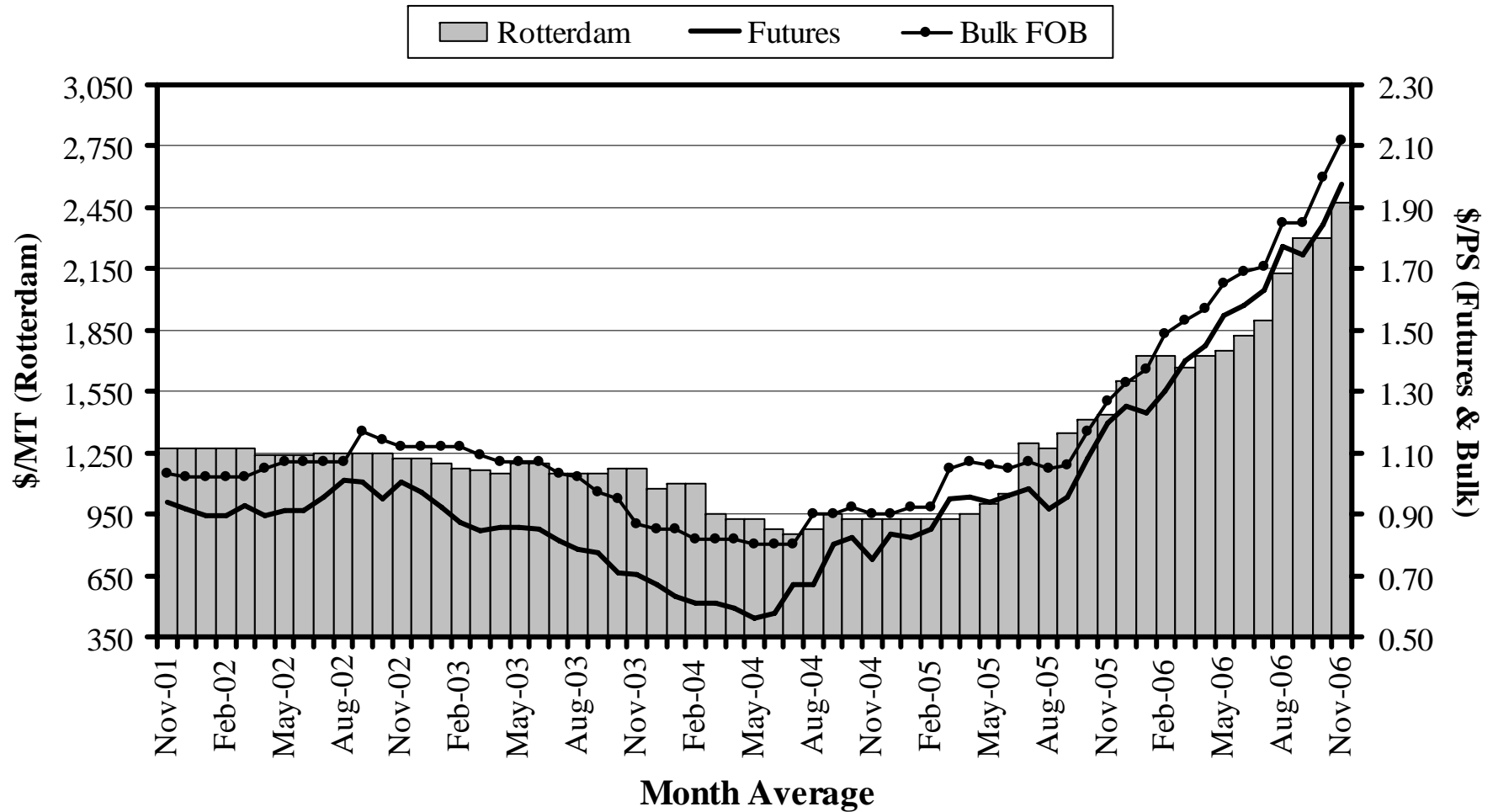
U.S. Retail Orange-Juice Sales

Item	Volume			Price		
	2005-06p	2006-07f	Change	2005-06p	2006-07f	Change
	- million SSE gallons -		- % -	- - \$/SSE gallon - -		- % -
SEASON:						
Refrigerated	675.7	631.8	-6.5	4.80	5.20	+8.3
NFC	372.4	361.7	-2.9	5.44	5.80	+6.6
RECON	303.3	270.1	-10.9	4.01	4.39	+9.5
FCOJ	62.1	55.2	-11.1	3.46	3.85	+11.3
Shelf Stable	6.3	5.8	-7.9	5.64	6.07	+7.6
TOTAL	744.2	692.8	-6.9	4.69	5.13	+9.4
SEASON-TO-DATE: (through 11/25/06) ^a						
Refrigerated	108.6	97.5	-10.2	4.54	5.27	+16.2
NFC	59.0	54.2	-8.1	5.15	5.95	+15.5
RECON	49.6	43.3	-12.7	3.80	4.42	+16.1
FCOJ	10.0	8.9	-11.2	3.30	3.80	+15.2
Shelf Stable	1.0	1.0	-2.8	5.59	5.85	+4.8
TOTAL	119.7	107.4	-10.2	4.44	5.15	+16.0

^aActual for 2004-05, preliminary for 2005-06, and forecast for 2006-07.

SOURCE: ACNielsen—Data are for U.S. grocery store chains doing \$2 million and greater annual sales, Wal-Mart stores excluding Sam's Clubs, mass-merchandisers and drug stores doing \$1 million and greater annual sales.

FCOJ Futures, Florida Bulk FOB & Rotterdam Monthly Average Prices November 2001 through November 2006



SOURCES: NYBOT (Futures); FCM (Bulk); Foodnews (Rotterdam).

FCOJ, NFC-OJ and FCGJ Prices – November^a

Item	2005-06	2006-07	Change
	- - - - \$/pounds solids - - - -		- - % - -
FCOJ Florida Bulk FOB	1.27	2.12	+66.9
FCOJ Futures	1.20	1.98	+65.0
NFC-OJ Futures	--	2.38	--
	- - - - \$/metric ton - - - -		
FCOJ Rotterdam	1,438	2,475	+72.1
	- - - - \$/pounds solids - - - -		- - % - -
FCGJ Florida Bulk FOB:			
Red	NA	NA	NA
White	NA	NA	NA

^aPrices are for the following time periods: Florida Bulk FCOJ and FCGJ FOB – Week ending 11/25/06.

Futures – November average.

Rotterdam – November *Foodnews*.

SOURCES: New York Board of Trade (Futures); Florida Citrus Mutual (Florida Bulk FCOJ and FCGJ FOB); *Foodnews* (Rotterdam).

FCPA Delivered-In Prices
(Report #10 – Week Ending 12/09/06)

Variety	Week Ending			Season-to-Date		
	2005-06	2006-07	Change	2005-06	2006-07	Change
----- \$/PS -----						
Early & Midseason^{a,b}	.968	1.859	+.891	.951	1.818	+.867
Valencias^a	NA	NA	NA	NA	NA	NA
White Grapefruit	1.968	.922	-1.046	1.831	.752	-1.079
Red Grapefruit	1.843	.818	-1.025	1.535	.661	-.874

^aFinal priced, combined.

^bSeason final.

Florida Fresh Orange and Specialty Fruit Shipments and FOB Prices, Season-to-Date

Variety	Shipments thru 12/10/06			FOB Price thru 12/10/06		
	2005-06 STD	2006-07 STD	Change	2005-06 STD	2006-07 STD	Change
	- 1,000 4/5-bu. cartons -		- % -	- - - - \$/carton - - - -		- % -
Early, Mids & Temples	728	916	+25.8	9.44	10.64	+12.7
Navel	2,294	2,502	+9.1	9.76	11.08	+13.5
Valencia	0	0	--	NA	NA	NA
Tangelo	264	349	+32.2	NA	1.36	NA
Early Tangerines	2,137	2,219	+3.8	15.10	15.19	+.6
Honey	0	0	--	NA	NA	NA
TOTAL	5,423	5,986	+10.4			

^aPrices for Sunburst.

SOURCE: Citrus Administrative Committee.

Selected Competitive Fresh Fruit Shipments

U.S. Clementine and Tangerine Imports			Texas Fresh Grapefruit Shipments		
2005-06	2006-07	Change	2005-06	2006-07	Change
STD August - October			STD – 12/10/06		
- - - - million pounds - - - -		- % -	- - thousand 7/10-bu. cartons - -		- % -
31.11	32.49	+4.4	1,661	1,447	-12.9

SOURCE: U.S. Department of Commerce.

SOURCE: Citrus Administrative Committee.

Florida Grapefruit-Juice Availability, Movement and Inventory

Item	Season (October-September)			Season-to-Date 12/09/06 (FCPA Week 10)		
	2005-06	2006-07 ^e	Change	2005-06	2006-07	Change
	- million SSE gallons -		- % -	- million SSE gallons -		- % -
Beginning Inventory	33.1	41.0	+23.7	33.1	41.0	+23.7
Pack from Fruit^a	61.6	70.9	+15.1	9.8	6.4	-34.2
Availability	94.6	111.9	+18.2	42.9	47.4	+10.6
Movement	53.7	61.0	+13.6	9.9	10.0	+1.8
FCGJ ^b	33.0	37.2	+12.7	6.5	6.5	+.2
NFC ^c	20.7	23.8	+15.0	3.4	3.5	+5.0
Ending Inventory	41.0	50.9	+24.1	33.0	37.4	+13.2
	- - weeks supply - -		- % -	- - weeks supply - -		- % -
Carryover – STD^d	39.7	43.4	+9.3	33.5	37.2	+11.1
Carryover – 13 Weeks^e				22.5	37.1	+64.7
Carryover – 3 Years^f				20.5	23.2	+13.2

^aIncludes domestic receipts by members of non-Florida product, Florida product received by members from non-members, foreign imports, net loss or gain during reprocessing and adjustments.

^bExcludes CGJ used in FCGJ.

^cExcludes movement of reconstituted chilled grapefruit juice.

^dSeason-to-date weeks supply based on season-to-date movement.

^eSeason-to-date weeks supply based on last 13-week movement.

^fSeason-to-date weeks supply based on last 3-year movement.

U.S. Grapefruit-Juice Exports

Country	October		
	2005-06	2006-07	Change
	- - - million SSE gallons - - -		- % -
Canada	.25	.21	-16.0
Europe	.49	.94	+91.8
Japan	.05	.32	+540.0
Other	.15	.07	-53.3
TOTAL	.94	1.54	+63.8

^aFDOC estimates.

^bFCPA exports of GJ for the 2006-07 season were up 87.0%, season-to-date through 12/09/06.

SOURCE: U.S. Department of Commerce.

U.S. Retail Grapefruit-Juice Sales

Item	Volume			Price		
	2005-06p	2006-07f	Change	2005-06p	2006-07f	Change
	- million SSE gallons -		- % -	- - \$/SSE gallon - -		- % -
SEASON:						
NFC	9.0	10.8	+20.0	7.05	6.16	-12.6
RECON	11.5	12.1	+5.2	5.72	4.89	-14.5
FCGJ	1.5	1.4	-6.7	3.32	3.20	-3.6
TOTAL	22.0	24.2	+10.0	6.11	5.36	-12.3
SEASON-TO-DATE: (through 11/25/06) ^a						
NFC	1.5	1.3	-13.8	6.82	7.16	+5.0
RECON	1.6	1.7	+4.4	5.80	5.60	-3.4
FCGJ	.2	.2	-13.1	3.24	3.62	+11.7
TOTAL	3.3	3.1	-4.9	6.10	6.12	+.4

^aSEASON-TO-DATE: Actual for 2004-05 and preliminary for 2005-06.

SOURCE: ACNielsen—Data are for U.S. grocery store chains doing \$2 million and greater annual sales, Wal-Mart stores excluding Sam's Clubs, mass-merchandisers and drug stores doing \$1 million and greater annual sales.

Florida Fresh Grapefruit Shipments, Season-to-Date through 12/10/06

Shipments/ Variety	2005-06	2006-07	Change
	----- 1,000 4/5-bu. cartons -----		-- % --
Domestic & Canadian – All	1,669	2,199	+31.8
White	104	74	-28.8
Colored	1,565	2,125	+35.8
Offshore Exports – All	1,040	2,781	+167.4
White	329	676	+105.5
Colored	711	2,105	+196.1
TOTAL - All	2,709	4,980	+83.8
White	433	750	+73.2
Colored	2,276	4,230	+85.9

SOURCE: Citrus Administrative Committee, preliminary.

Florida Fresh Grapefruit Domestic and Export Shipments

Country	STD through 11/26/06		Change
	2005-06	2006-07	
	- thousand cartons -		- % -
United States	854	1,169	+36.9
Canada	164	299	+82.6
Europe	275	993	+261.4
Japan	403	1,337	+232.1
Other	11	21	+90.9
TOTAL	1,707	3,819	+123.7

SOURCE: Florida Department of Citrus.

Florida Fresh Grapefruit Domestic FOB Prices Season-to-Date through 12/10/06

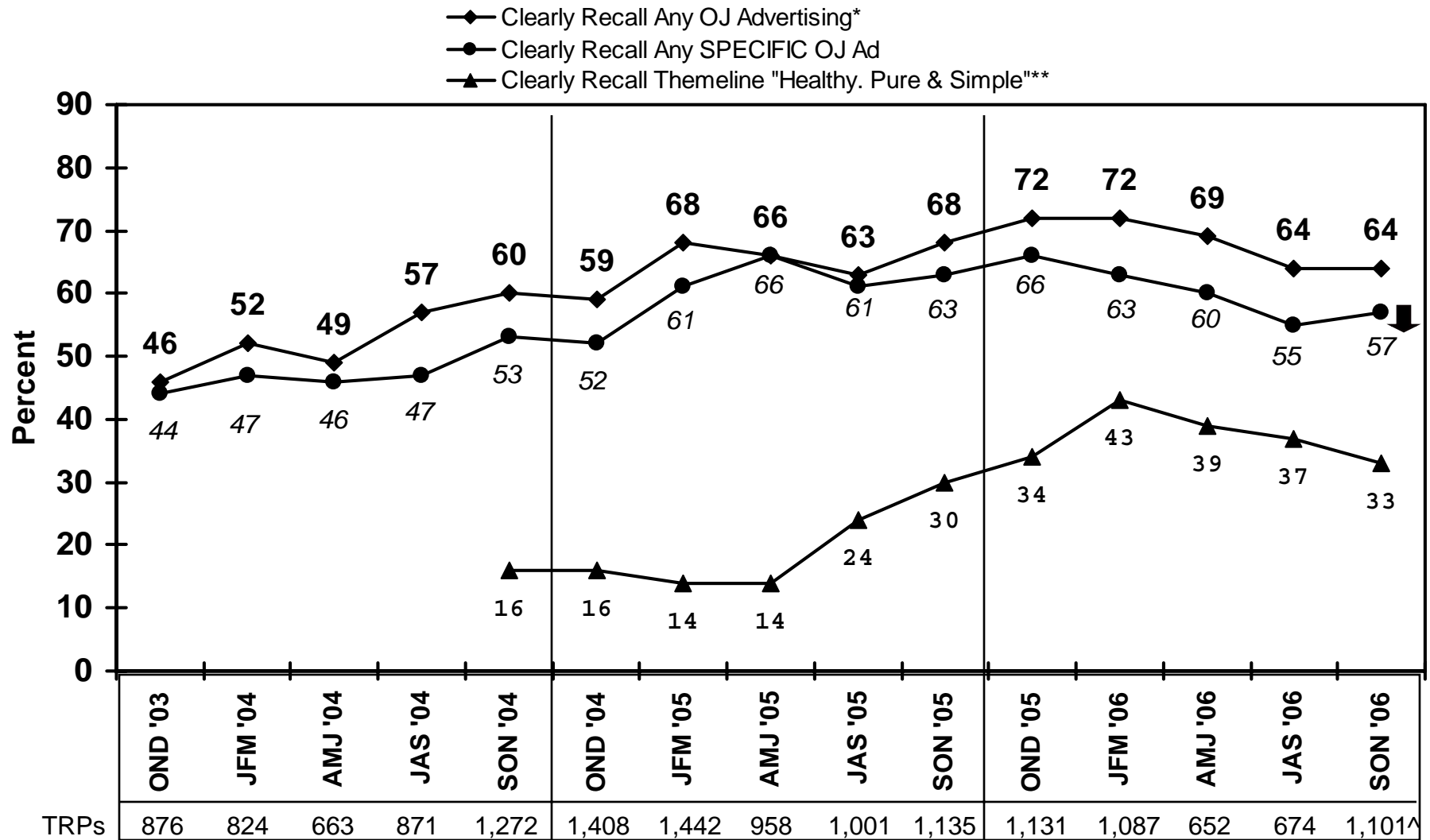
Variety	FOB Price		
	2005-06 STD	2006-07 STD	Change
	----- \$/carton-----		-- % --
GULF COAST			
White	NA	NA	NA
Colored	14.61	NA	NA
INDIAN RIVER			
White	NA	11.40	NA
Colored	13.55	10.54	-22.2
SUNRIDGE			
White	NA	11.40	NA
Colored	NA	10.54	NA

SOURCE: Citrus Administrative Committee.

Foreign Exchange Rates Per \$US

Date	Euro	Real	Yen
ANNUAL			
2002	1.06106	2.96705	125.21937
2003	0.88540	3.11678	115.97995
2004	0.80510	2.92629	108.17451
2005	0.80453	2.43480	110.12445
2005 (thru 12/15/05)	0.80295	2.43963	109.82100
2006 (thru 12/15/06)	0.79868	2.18125	116.23511
% Change	-0.5	-10.6	+5.8
WEEK ENDING 12/15/06			
2005	0.84613	2.24716	120.57671
2006	0.75621	2.14630	116.64586
% Change	-10.6	-4.5	-3.3

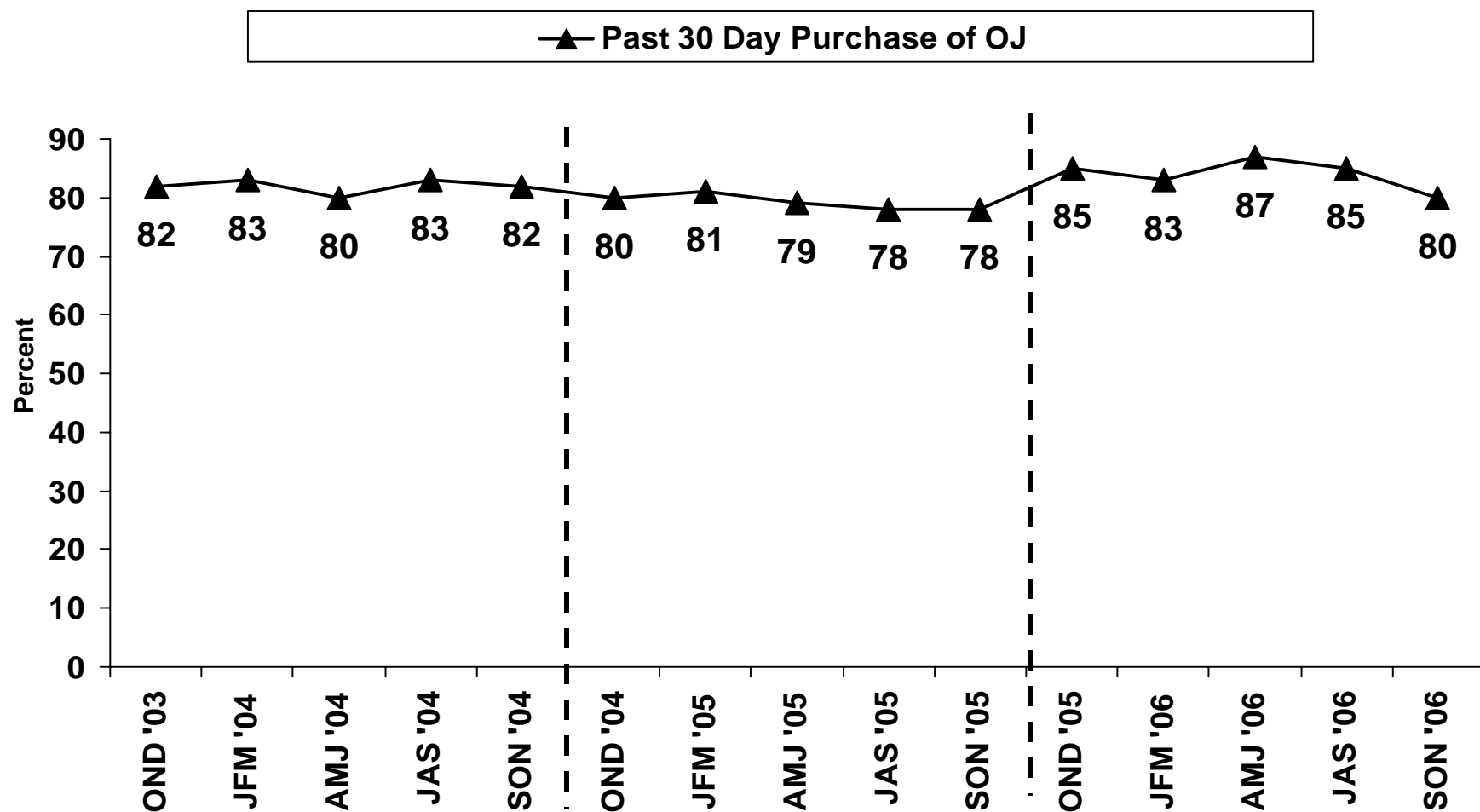
Recall of FDOC OJ Advertising*



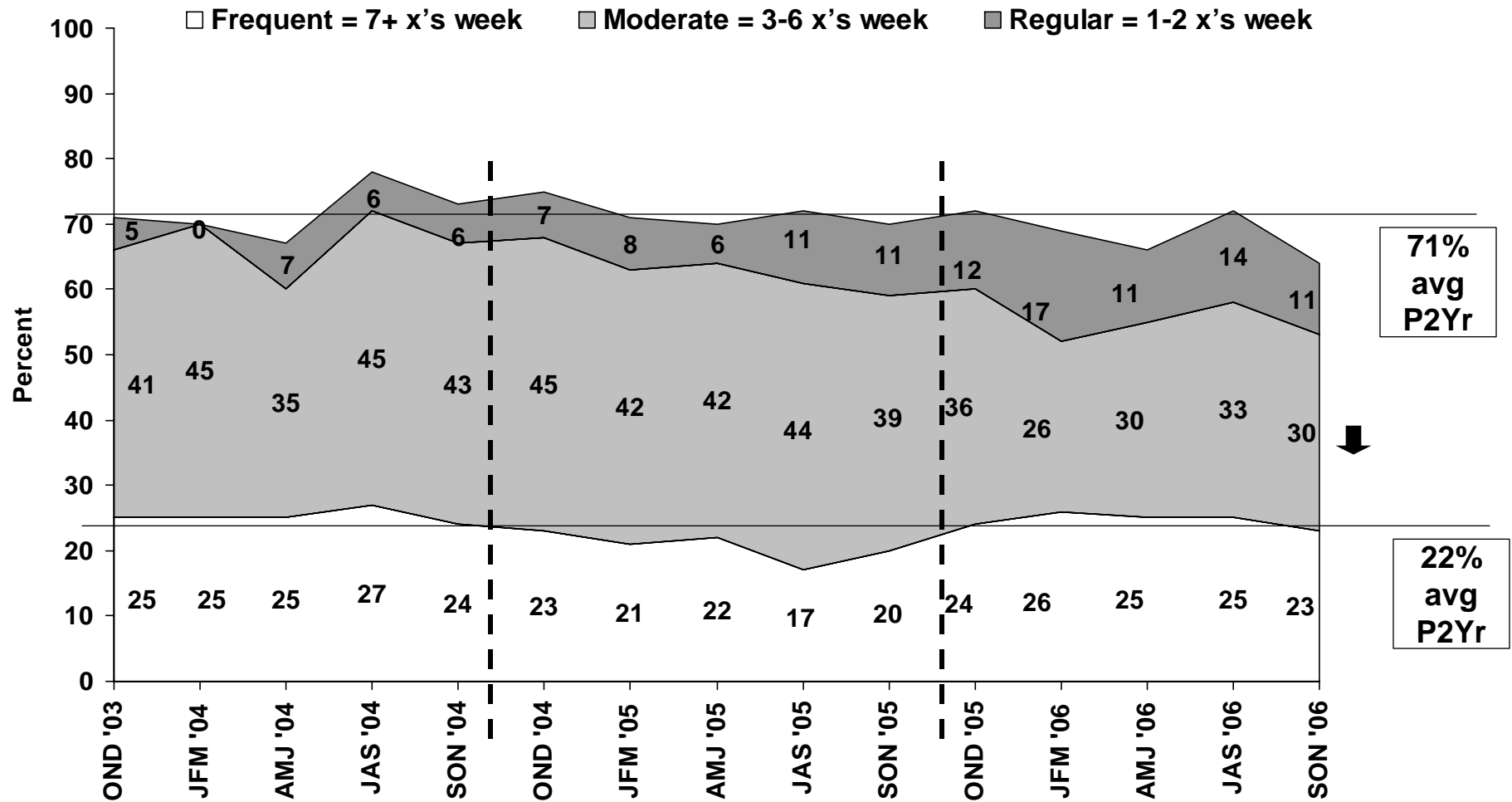
*Recall of FDOC Themelines for OJ is included. "Best Start Under the Sun" was the themeline from AMJ '02 through February '04. "Drink Florida Orange Juice Everyday" was the themeline for March-Oct '04; this themeline was not tracked. **New themeline "Healthy. Pure & Simple" added November 2004; shown but not spoken in 15 second ads for "Natural Remedies," and "Island". Spoken in both 15 and 30 seconds ads for "Laboratory" and "Hat". TRPs are for target of Adults 35+ as of May 2004.

^=Estimated TRPs.

Purchased Orange Juice in Past 30 Days



OJ Frequency of Usage Groups



↓ = Significantly lower than year ago at 90%+ confidence level.

OJ Provides Important Nutrients, Vitamins, and/or Minerals

(Top 2 Box Ratings – 10,9 on a 10-pt. Scale)

