

# Florida Citrus Economic & Market Indicators September 2020

Florida Department  
of Citrus

Economic and Market  
Research



# Florida Citrus Economic & Market Indicators

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## Summary Comments

- Brazil's OJ exports for 2020-21 Brazilian season July - August were down 17.2% from the previous 3 season average with exports to the NAFTA region, Europe and the Far East down 24.1%, down 25.3% and up 38.5%, respectively.
- Season-to-date through 08/29/20, Florida FCOJ availability, movement and ending inventories were down 7.4%, down 2.8%, and down 9.9% respectively, from last season.
- Season-to-date through 08/29/20, Florida SSOJ availability, movement and ending inventories were down 0.2%, up 9.5%, and down 20.2% respectively, from last season.
- For October through July of the 2019-20 season, U.S. OJ imports and exports were down 38.1% and up 13.6% from last season, respectively. Season-to-date through 08/29/20, Florida OJ exports were down 24.2% (FDOC Processors Report).
- For October through July of the 2019-20 season, Non-FDOC Processor FCOJ disappearance, based on FCOJ inventories and imports, was down 17.2%.
- Season-to-date through 08/29/20, OJ volume sales in all Nielsen retail outlets (U.S. grocery stores doing \$2 million and greater annual sales, drug stores doing \$1 million and greater annual sales, mass merchandisers, Walmart, club (Sam's and BJ's), dollar stores (Dollar General, Family Dollar and Fred's), and military/DECA) were up 12.6% from the previous season, with the NFC price up 2.9%, the Recon price down 0.5% and the overall OJ price up 2.0%.
- The average FCOJ Futures price was \$1.17/PS, up \$0.17/PS from last year.
- Season-to-date through 02/22/20, the delivered-in price for early and midseason oranges was \$0.97/PS, down \$1.23/PS from last season. Season-to-date through 08/01/20, the delivered-in price for late season oranges was \$1.25/PS, down \$1.14/PS from last season.
- Season-to-date through 07/31/20, fresh orange and specialty citrus shipments were up 26.9% from last season.
- From August through July of the 2019-20 season, clementine and tangerine imports were down 4.9% relative to last season. Season-to-date through 04/11/20, Texas fresh grapefruit shipments were up 0.3% relative to last season.
- Season-to-date through 08/29/20, Florida FCGJ availability, movement and ending inventories were down 9.7%, down 51.6%, and up 7.0% respectively, from last season.
- Season-to-date through 08/29/20, Florida SSGJ availability, movement and ending inventories were up 4.6%, down 6.2%, and up 12.5% respectively, from last season.
- For October through July of the 2019-20 season, U.S. GJ exports were down 18.0%. Season-to-date through 08/29/20, Florida GJ exports were up 14.4% (FDOC Processors report).
- Season-to-date through 08/29/20, GJ volume sales in all Nielsen retail outlets (U.S. grocery stores doing \$2 million and greater annual sales, drug stores doing \$1 million and greater annual sales, mass merchandisers, Walmart, club (Sam's and BJ's), dollar stores (Dollar General, Family Dollar and Fred's), and military/DECA) were up 5.1% from the previous season, with the overall GJ price up 6.6%.
- Season-to-date through 07/31/20, Florida fresh grapefruit shipments were up 14.4% from last season, with Domestic/Canadian shipments up 17.4% and offshore shipments up 9.7% (DFVI). Shipments to Europe and Japan were up 36.6% and down 10.9%, respectively. Domestic FOB prices (CAC) for fresh white and red/pink grapefruit were up 6.6% and down 11.4%, respectively.
- For the month of August, versus the same period last year, the Euro/USD, Real/USD, and Yen/USD exchange rates were down 5.8%, up 35.6%, and down 0.2% respectively.

## Brazil Orange Juice Exports

Destination		Season-to-date July - August				Change from 3 season average
		2017-18	2018-19	2019-20	2020-21	
million SSE Gallons						%
NAFTA <sup>b</sup>	Total	55.0	53.5	46.4	39.2	-24.1
	FCOJ	32.3	33.4	31.7	21.9	-32.6
	SSOJ	22.8	20.1	14.7	17.3	-9.8
Europe <sup>c</sup>	Total	173.0	165.9	198.7	133.8	-25.3
	FCOJ	133.7	131.5	155.2	94.4	-32.6
	SSOJ	39.3	34.3	43.5	39.4	+9.9
East Asia <sup>d</sup>	Total	14.6	10.2	29.4	25.0	+38.5
Others	Total	8.9	7.9	7.2	14.8	+84.1
Total		251.5	237.5	281.8	212.8	-17.2

<sup>a</sup>Assumes exports with codes 2009.11.00 (FCOJ) and 2009.19.00 (Other) are 66° Brix, while exports with code 2009.12.00 (NFC) are 11.8° Brix.

<sup>b</sup>U.S., Canada, and Mexico.

<sup>c</sup>Russia, Ukraine, and Turkey are included in Europe.

<sup>d</sup>China, Japan, Taiwan, Hong Kong, Macau, South Korea, North Korea, Philippines, and Vietnam.

SOURCE: Secretary of External Commerce - Brazil

## Florida FCOJ Availability, Movement and Inventory

Item	Prior Season Comparison (October - September)			Season-to-Date 08/29/20 (FDOC Processor Week 48)		
	2017-18	2018-19	Change	2018-19	2019-20	Change
	- million PS -		- % -	- million PS -		- % -
<b>Beginning Inventory</b>	<b>192.2</b>	<b>243.1</b>	<b>+26.5</b>	<b>243.1</b>	<b>317.8</b>	<b>+30.7</b>
<b>Pack from Fruit</b>	<b>41.1</b>	<b>87.3</b>	<b>+112.4</b>	<b>87.3</b>	<b>82.0</b>	<b>-6.0</b>
<b>Imports<sup>a</sup></b>	<b>313.3</b>	<b>304.4</b>	<b>-2.8</b>	<b>280.9</b>	<b>166.0</b>	<b>-40.9</b>
<b>Availability</b>	<b>546.6</b>	<b>634.8</b>	<b>+16.1</b>	<b>611.3</b>	<b>565.8</b>	<b>-7.4</b>
<b>Movement</b>	<b>303.5</b>	<b>317.0</b>	<b>+4.5</b>	<b>296.1</b>	<b>287.7</b>	<b>-2.8</b>
Bulk	237.3	251.6	+6.1	237.5	237.1	-0.2
Packaged	66.2	65.4	-1.2	58.6	50.6	-13.6
<b>Ending Inventory</b>	<b>243.1</b>	<b>317.8</b>	<b>+30.7</b>	<b>315.2</b>	<b>284.0</b>	<b>-9.9</b>
Bulk	237.2	311.9	+31.5	309.2	278.0	-10.1
Packaged	5.9	5.8	-1.6	6.0	6.0	+0.3
	- weeks supply -		- % -	- weeks supply -		- % -
<b>Carry Over - STD<sup>b</sup></b>	<b>41.7</b>	<b>52.1</b>	<b>+25.1</b>	<b>51.1</b>	<b>47.4</b>	<b>-7.3</b>

<sup>a</sup>Also includes domestic receipts by members of non-Florida product, foreign imports, reprocessed tangerine juice, chilled OJ used in FCOJ, net loss or gain during reprocessing and adjustments.

<sup>b</sup>Season-to-date weeks supply based on season-to-date movement.

## Florida SSOJ Availability, Movement and Inventory

Item	Prior Season Comparison (October - September)			Season-to-Date 08/29/20 (FDOC Processor Week 48)		
	2017-18	2018-19	Change	2018-19	2019-20	Change
	- million PS -		- % -	- million PS -		- % -
<b>Beginning Inventory</b>	<b>186.7</b>	<b>124.5</b>	<b>-33.3</b>	<b>124.5</b>	<b>209.0</b>	<b>+67.8</b>
<b>Pack from Fruit</b>	<b>200.2</b>	<b>318.4</b>	<b>+59.0</b>	<b>318.3</b>	<b>292.7</b>	<b>-8.1</b>
<b>Imports<sup>a</sup></b>	<b>104.8</b>	<b>119.3</b>	<b>+13.8</b>	<b>112.9</b>	<b>52.8</b>	<b>-53.2</b>
<b>Availability</b>	<b>491.8</b>	<b>562.3</b>	<b>+14.3</b>	<b>555.8</b>	<b>554.5</b>	<b>-0.2</b>
<b>Movement<sup>b</sup></b>	<b>365.4</b>	<b>347.4</b>	<b>-4.9</b>	<b>321.5</b>	<b>352.1</b>	<b>+9.5</b>
Bulk	26.7	20.0	-25.1	17.4	23.9	+37.5
Packaged	338.7	327.4	-3.3	304.1	328.2	+7.9
<b>Ending Inventory</b>	<b>124.5</b>	<b>209.0</b>	<b>+67.8</b>	<b>230.6</b>	<b>183.9</b>	<b>-20.2</b>
Bulk	119.7	203.5	+70.0	224.8	178.4	-20.6
Packaged	4.9	5.5	+13.0	5.8	5.5	-4.0
	- weeks supply -		- % -	- weeks supply -		- % -
<b>Carry Over - STD<sup>c</sup></b>	<b>17.7</b>	<b>31.3</b>	<b>+76.5</b>	<b>34.4</b>	<b>25.1</b>	<b>-27.2</b>

<sup>a</sup>Also includes domestic receipts by members of non-Florida product, foreign imports, reprocessed tangerine juice, FCOJ used in chilled OJ, net loss or gain during reprocessing and adjustments.

<sup>b</sup>Excludes evaporated COJ.

<sup>c</sup>Season-to-date weeks supply based on season-to-date movement.

## U.S. Orange Juice Imports<sup>a</sup>

Season-to-Date October - July						
Country	Volume			FOB Value/SSG <sup>c</sup>		
	2018-19	2019-20	Change	2018-19	2019-20	Change
<b>TOTAL OJ</b>						
	- million SSE gallons -		- % -	- \$/SSE gallon -		- % -
Brazil	198.73	140.23	-29.4	1.46	1.29	-12.0
CBI <sup>b</sup>	2.34	2.88	+23.1	1.03	1.05	+1.4
Mexico	190.33	91.58	-51.9	1.86	1.79	-3.8
Other	26.74	24.03	-10.1	1.84	1.85	+0.3
<b>TOTAL</b>	<b>418.13</b>	<b>258.71</b>	<b>-38.1</b>	<b>1.67</b>	<b>1.52</b>	<b>-9.1</b>
<b>NFC OJ</b>						
Brazil	97.36	56.00	-42.5	1.60	1.47	-8.5
CBI <sup>b</sup>	0.00	0.00	N/A	0.00	0.00	N/A
Mexico	24.30	17.56	-27.7	2.56	2.67	+4.6
Other	0.06	0.08	+35.2	4.73	3.45	-27.1
<b>TOTAL</b>	<b>121.71</b>	<b>73.64</b>	<b>-39.5</b>	<b>1.79</b>	<b>1.76</b>	<b>-2.1</b>

<sup>a</sup>Includes OJ with added vitamins and minerals.

<sup>b</sup>Includes Dominican Republic-Central America initiatives.

<sup>c</sup>The FOB value of the products reported by the exporter, which does not include duties, freight, custom fees or other charges, divided by the reported number of single strength gallons.

SOURCE: U.S. Department of Commerce.

## U.S. Orange Juice Exports<sup>a,b</sup>

Season-to-Date October - July						
Country	Volume			FOB Value/SSG <sup>c</sup>		
	2018-19	2019-20	Change	2018-19	2019-20	Change
	- million SSE gallons -		- % -	- \$/SSE gallon -		- % -
Canada	24.87	27.66	+11.2	5.21	5.07	-2.6
Europe	0.37	0.81	+118.1	6.35	4.00	-37.0
Japan	0.33	0.23	-31.3	6.36	4.94	-22.3
Other	9.51	11.15	+17.3	5.41	5.10	-5.9
<b>TOTAL</b>	<b>35.09</b>	<b>39.85</b>	<b>+13.6</b>	<b>5.29</b>	<b>5.05</b>	<b>-4.4</b>

<sup>a</sup> Includes OJ with added vitamins and minerals.

<sup>b</sup> FDOC Processor exports of OJ for the 2019-20 season were down 24.2%, season-to-date through 08/29/20.

<sup>c</sup> The FOB value of the products reported by the exporter, which does not include duties, freight, custom fees or other charges, divided by the reported number of single strength gallons.

SOURCE: U.S. Department of Commerce.



## Non-FDOC Processor FCOJ Disappearance Index

Item	Season-to-Date October - July		
	2018-19	2019-20	Change
- million SSE gallons -			- % -
<b>Beginning Inventory<sup>a</sup></b>	<b>12.3</b>	<b>21.6</b>	<b>+76.3</b>
<b>Foreign Imports<sup>b</sup></b>	<b><u>78.7</u></b>	<b><u>57.2</u></b>	<b><u>-27.3</u></b>
<b>Availability<sup>c</sup></b>	<b>91.0</b>	<b>78.9</b>	<b>-13.3</b>
<b>Ending Inventory<sup>a</sup></b>	<b><u>25.1</u></b>	<b><u>24.3</u></b>	<b><u>-3.2</u></b>
<b>Non-FDOC Processor FCOJ Disappearance<sup>d</sup></b>	<b>65.9</b>	<b>54.5</b>	<b>-17.2</b>

<sup>a</sup>National Agricultural Statistics Service (NASS), U.S. FCOJ cold storage minus FDOC Processor, FCOJ inventory, as reported in NASS-USDA, "Cold Storage" reports and FDOC Processor weekly reports.

<sup>b</sup>U.S. Department of Commerce, FCOJ imports (excludes bonded product) minus FDOC Processor, FCOJ foreign product imported by members (includes bonded product).

<sup>c</sup>Beginning inventory and imports.

<sup>d</sup>Non-FDOC Processor FCOJ Disappearance is a partial Measure of non-Florida presumed consumption that does not include U.S. production from States other than Florida or U.S. exports.

# U.S. Retail Orange Juice Sales

## Expanded All Outlets Combined (xAOC)<sup>a</sup>

Item	Volume Sales			Dollar Sales			Price/Eq Gallon		
	2017-18	2018-19	Change	2017-18	2018-19	Change	2017-18	2018-19	Change
	- million SSE gallons -		- % -	- million dollars -		- % -	- \$/SSE gallon -		- % -
Full Season Results for the Previous Two Seasons									
Refrigerated	382.78	361.94	-5.4	2,633.77	2,564.57	-2.6	6.88	7.09	+3.0
NFC	249.50	227.66	-8.8	1,969.77	1,909.03	-3.1	7.90	8.39	+6.2
RECON	133.28	134.28	+0.8	663.99	655.53	-1.3	4.98	4.88	-2.0
FCOJ	16.40	15.18	-7.4	82.33	75.61	-8.2	5.02	4.98	-0.8
Shelf Stable	12.26	12.66	+3.2	89.34	92.62	+3.7	7.29	7.32	+0.4
TOTAL	411.44	389.78	-5.3	2,805.43	2,732.79	-2.6	6.82	7.01	+2.8
Season-to-Date through 08/29/20, Topline Report #12									
	2018-19	2019-20	Change	2018-19	2019-20	Change	2018-19	2019-20	Change
Refrigerated	336.00	378.72	+12.7	2,380.76	2,742.74	+15.2	7.09	7.24	+2.2
NFC	211.83	240.23	+13.4	1,773.68	2,068.98	+16.6	8.37	8.61	+2.9
RECON	124.16	138.49	+11.5	607.08	673.76	+11.0	4.89	4.86	-0.5
FCOJ	14.15	16.81	+18.8	70.52	85.76	+21.6	4.98	5.10	+2.4
Shelf Stable	11.74	12.03	+2.5	86.07	87.04	+1.1	7.33	7.24	-1.3
TOTAL	361.89	407.56	+12.6	2,537.35	2,915.54	+14.9	7.01	7.15	+2.0

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

## U.S. Retail NFC Orange Juice Promotional Pricing (xAOC)

Unit Sizes	Average Price Per Unit			Average Price Per Eq. Gallon		
	16 Week Period Ending			16 Week Period Ending		
	1/18/2020	5/9/2020	08/29/20	1/18/2020	5/9/2020	08/29/20
<b>Non-Promotional Price</b>						
NFC <11 oz	\$4.05	\$4.21	\$4.06	\$12.21	\$12.38	\$12.11
NFC 11-20 oz	\$1.81	\$1.96	\$1.98	\$15.89	\$16.29	\$16.23
NFC 20-50 oz	\$3.94	\$4.10	\$4.19	\$15.58	\$16.16	\$16.37
NFC 50-70 oz	\$3.70	\$3.76	\$3.81	\$8.65	\$8.84	\$8.93
NFC 70-110 oz	\$5.84	\$5.94	\$6.00	\$8.41	\$8.55	\$8.63
NFC >110 oz	\$6.73	\$6.79	\$6.77	\$6.73	\$6.79	\$6.77
<b>Promotional Price<sup>a</sup></b>						
NFC <11 oz	\$3.59	\$3.14	\$3.03	\$10.39	\$10.90	\$10.53
NFC 11-20 oz	\$1.38	\$1.34	\$1.38	\$13.80	\$13.64	\$14.02
NFC 20-50 oz	\$3.38	\$3.68	\$3.41	\$13.80	\$14.79	\$13.57
NFC 50-70 oz	\$3.07	\$3.23	\$3.24	\$7.51	\$7.86	\$7.91
NFC 70-110 oz	\$5.53	\$5.52	\$5.63	\$7.97	\$7.96	\$8.10
NFC >110 oz	\$6.26	\$6.20	\$6.70	\$6.26	\$6.20	\$6.70

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

<sup>a</sup>Promotional prices includes features, displays, and combined feature and display prices. Temporary price reductions (TPR) are not included in promotional prices.

## U.S. Retail NFC Orange Juice Sales by Unit Size (xAOC)

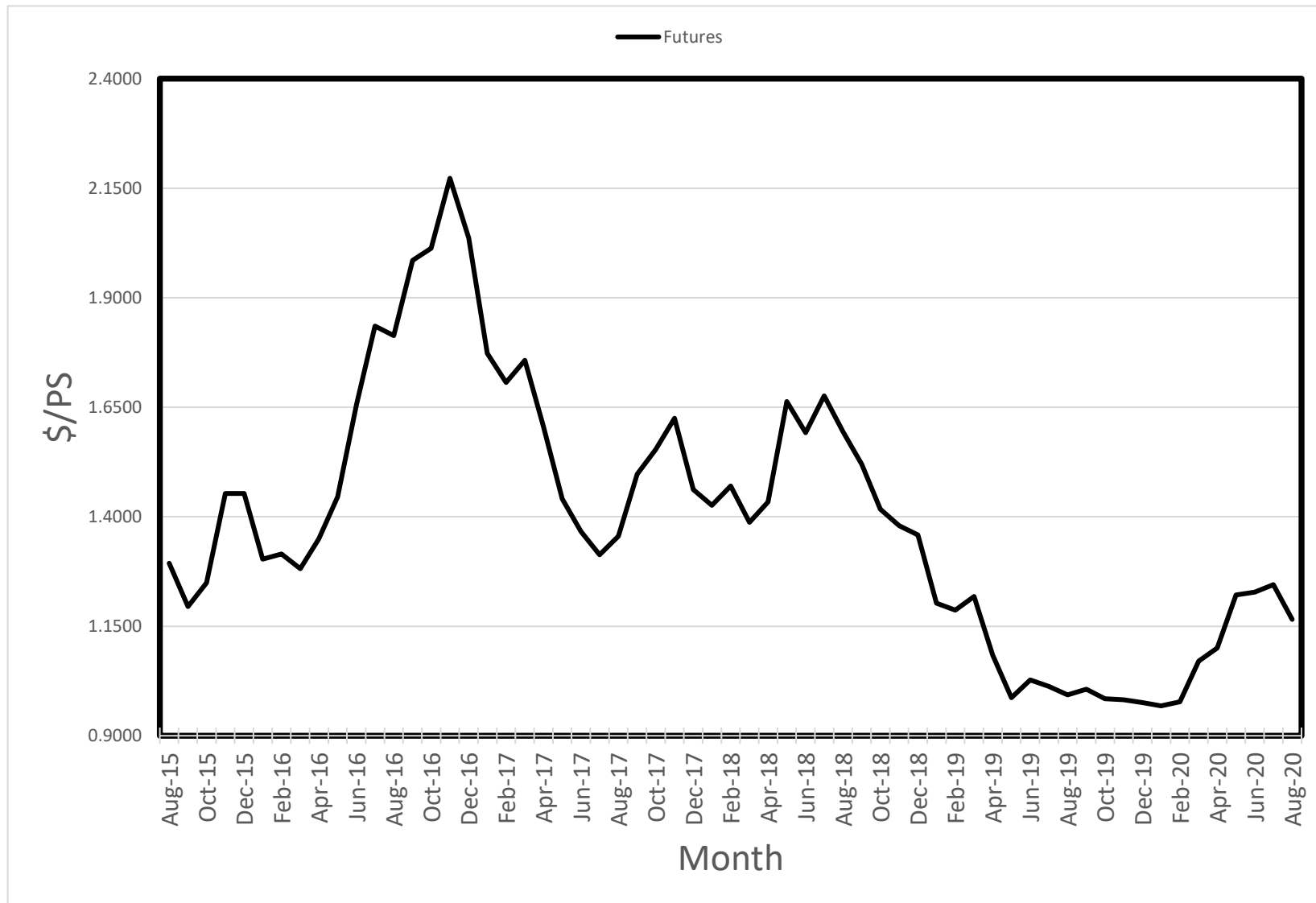
Unit Sizes	Dollar Sales			Gallon Sales		
	16 Week Period Ending			16 Week Period Ending		
	1/18/2020	5/9/2020	08/29/20	1/18/2020	5/9/2020	08/29/20
NFC <11 oz	\$9,158,142	\$9,947,298	\$9,727,138	760,438	810,545	812,804
NFC 11-20 oz	\$34,238,916	\$33,428,326	\$31,977,064	2,226,178	2,134,086	2,038,351
NFC 20-50 oz	\$8,760,186	\$9,707,404	\$8,760,014	573,160	608,259	547,859
NFC 50-70 oz	\$392,082,298	\$484,478,808	\$430,935,042	48,311,692	57,396,459	50,058,832
NFC 70-110 oz	\$160,464,576	\$189,106,030	\$180,657,992	19,303,728	22,404,094	21,039,092
NFC >110 oz	\$20,835,652	\$27,744,256	\$26,974,674	3,109,516	4,108,076	3,987,496
<b>% Sold on Promotion<sup>a</sup></b>						
NFC <11 oz	7.8%	6.2%	7.8%	9.1%	7.0%	8.9%
NFC 11-20 oz	22.0%	20.6%	21.8%	24.5%	23.7%	24.4%
NFC 20-50 oz	14.9%	13.5%	11.6%	16.5%	14.6%	13.6%
NFC 50-70 oz	43.1%	37.9%	28.8%	46.6%	40.7%	31.3%
NFC 70-110 oz	20.7%	16.9%	8.3%	21.6%	18.0%	8.8%
NFC >110 oz	6.0%	6.3%	1.2%	6.4%	6.9%	1.2%

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

<sup>a</sup>Promotional prices includes features, displays, and combined feature and display prices. Temporary price reductions (TPR) are not included in promotional prices.

## FCOJ Futures Monthly Average Prices

August 2015 through August 2020



## FCOJ Prices August

Item	2019	2020	Change
- \$ / PS -			- % -
<b>FCOJ Futures</b>	<b>0.9933</b>	<b>1.1656</b>	<b>+17.3</b>

SOURCES: Intercontinental Exchange, Inc. (Futures)

## FDOC Processor Delivered-In Prices

Variety	STD Prices Reported for Canner's A		
	2018-19	2019-20	Change
	- \$ / PS -		- % -
Early & Midseason Oranges <sup>a</sup>	\$2.20	\$0.97	-55.9%
Late Season Oranges <sup>b</sup>	\$2.38	\$1.25	-47.5%
White Grapefruit <sup>c</sup>	\$3.15	\$2.25	-28.6%
Red/Pink Grapefruit <sup>c</sup>	\$3.07	\$2.07	-32.6%

<sup>a</sup> 2019-20 Season final price from 02/22/20. 2018-19 Season final price from 02/23/19.

<sup>b</sup> 2019-20 Season final price from 08/01/20. 2018-19 Season final price from 07/27/19.

<sup>c</sup> 2019-20 Season final price from 05/16/20. 2018-19 Season final price from 05/18/19.

**Sao Paulo Processed Orange Spot Prices**  
**Monthly Average and Season-to-Date**

Season	August Average		Season-to-Date <sup>a</sup> (July - August)	
	Price	Change from Year Ago	Price	Change from Year Ago
	- \$ / box <sup>b</sup> -	- % -	- \$ / box <sup>b</sup> -	- % -
<b>2018-19</b>	<b>5.6</b>		<b>5.49</b>	
<b>2019-20</b>	<b>4.98</b>	<b>-11.1</b>	<b>5.11</b>	<b>-6.9</b>
<b>2020-21</b>	<b>4.20</b>	<b>-15.7</b>	<b>4.25</b>	<b>-16.8</b>

<sup>a</sup> Unweighted average of monthly prices.

<sup>b</sup> In U.S. dollars as reported at the CEPEA website.



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

Variety	Shipments through 07/31/20			FOB Price through 05/17/20		
	2018-19	2019-20	Change	2018-19	2019-20	Change
	STD	STD		Final	STD	
	- 1,000 of 4/5 bu. cartons -		- % -	- \$ / carton -		- % -
Early & Mid Oranges	1,735	1,929	+11.1	15.07	12.37	-17.9
Navel	665	766	+15.2	17.60	15.44	-12.3
Valencia	2,214	3,263	+47.3	13.44	14.86	+10.6
Tangelo	133	136	+2.6	16.07	24.13	+50.2
Early Tangerines <sup>a</sup>	576	823	+43.0	21.37	23.43	+9.6
Honey / Murcotts	218	148	-31.9	29.67	24.74	-16.6
Royal Tangerines / Temples	52	32	-37.4	17.91	N/A	N/A
<b>TOTAL</b>	<b>5,593</b>	<b>7,098</b>	<b>+26.9</b>			

Source: Fresh fruit shipments as reported by FDACS. FOB prices as released by the Citrus Administrative Committee.

<sup>a</sup>Prices for Sunburst.

## Selected Competitive Fresh Fruit Shipments

U.S. Clementine, Tangerine and Wilkings Imports			Texas Fresh Grapefruit Shipments		
2018-19	2019-20	Change	2018-19	2019-20	Change
August - July			STD - 04/11/20		
- million pounds -		- % -	- thousand 7/10 bu. Cartons -		- % -
664.0	631.3	-4.9	Total 3,964	3,977	+0.3
			Export 274	18	-93.5
Source: U.S. Department of Commerce.			Source: Texas Valley Citrus Committee.		

## Florida FCGJ Availability, Movement and Inventory

Item	Prior Season Comparison (October - September)			Season-to-Date 08/29/20 (FDOC Processor Week 48)		
	2017-18	2018-19	Change	2018-19	2019-20	Change
	- million PS -		- % -	- million PS -		- % -
<b>Beginning Inventory</b>	<b>9.6</b>	<b>5.2</b>	<b>-45.7</b>	<b>5.2</b>	<b>6.9</b>	<b>+32.0</b>
<b>Pack from Fruit</b>	<b>2.3</b>	<b>2.7</b>	<b>+19.5</b>	<b>2.7</b>	<b>2.2</b>	<b>-18.8</b>
<b>Imports<sup>a</sup></b>	<b>5.0</b>	<b>3.8</b>	<b>-23.2</b>	<b>3.8</b>	<b>1.5</b>	<b>-60.3</b>
<b>Availability</b>	<b>16.9</b>	<b>11.8</b>	<b>-30.2</b>	<b>11.7</b>	<b>10.6</b>	<b>-9.7</b>
<b>Movement</b>	<b>11.5</b>	<b>4.1</b>	<b>-64.5</b>	<b>3.8</b>	<b>1.8</b>	<b>-51.6</b>
Bulk	11.4	3.9	-65.5	3.6	1.7	-52.7
Packaged	0.1	0.2	+44.8	0.2	0.1	-23.7
<b>Ending Inventory</b>	<b>5.2</b>	<b>6.9</b>	<b>+32.0</b>	<b>7.1</b>	<b>7.6</b>	<b>+7.0</b>
Bulk	5.2	6.8	+32.2	7.1	7.6	+7.0
Packaged	0.0	0.0	-3.0	0.0	0.0	-14.8
	- - weeks supply - -		- % -	- - weeks supply - -		- % -
<b>Carry Over<sup>b</sup></b>	<b>23.4</b>	<b>87.0</b>	<b>+271.4</b>	<b>89.8</b>	<b>198.4</b>	<b>+120.8</b>

<sup>a</sup>Also includes domestic receipts by members of non-Florida product, foreign imports, reprocessed tangerine juice, FCGJ used in chilled GJ, net loss or gain during reprocessing and adjustments.

<sup>b</sup>Season-to-date weeks supply based on season-to-date movement.

## Florida SSGJ Availability, Movement and Inventory

Item	Prior Season Comparison (October - September)			Season-to-Date: 08/29/20 (FDOC Processor Week 48)		
	2017-18	2018-19	Change	2018-19	2019-20	Change
	- million PS -		- % -	- million PS -		- % -
<b>Beginning Inventory</b>	<b>8.6</b>	<b>6.9</b>	<b>-19.7</b>	<b>6.9</b>	<b>8.5</b>	<b>+24.0</b>
<b>Pack from Fruit</b>	<b>6.4</b>	<b>8.7</b>	<b>+36.8</b>	<b>8.7</b>	<b>10.6</b>	<b>+21.1</b>
<b>Imports<sup>a</sup></b>	<b>4.4</b>	<b>4.7</b>	<b>+5.7</b>	<b>4.5</b>	<b>2.0</b>	<b>-56.4</b>
<b>Availability</b>	<b>19.4</b>	<b>20.3</b>	<b>+4.7</b>	<b>20.2</b>	<b>21.1</b>	<b>+4.6</b>
<b>Movement</b>	<b>12.4</b>	<b>11.0</b>	<b>-11.4</b>	<b>10.1</b>	<b>9.5</b>	<b>-6.2</b>
Bulk	1.2	0.5	-57.6	0.4	-0.1	-128.9
Packaged	11.2	10.5	-6.5	9.6	9.6	-0.5
<b>Ending Inventory</b>	<b>6.9</b>	<b>8.5</b>	<b>+24.0</b>	<b>9.3</b>	<b>10.4</b>	<b>+12.5</b>
Bulk	6.7	8.4	+24.2	9.0	10.3	+13.8
Packaged	0.1	0.2	+14.6	0.2	0.1	-36.9
	- - weeks supply - -		- % -	- - weeks supply - -		- % -
<b>Carry Over<sup>b</sup></b>	<b>28.9</b>	<b>40.5</b>	<b>+40.0</b>	<b>44.1</b>	<b>53.0</b>	<b>+20.0</b>

<sup>a</sup>Also includes domestic receipts by members of non-Florida product, foreign imports, reprocessed tangerine juice, FCGJ used in chilled GJ, net loss or gain during reprocessing and adjustments.

<sup>b</sup>Season-to-date weeks supply based on season-to-date movement.

## U.S. Grapefruit Juice Exports<sup>a,b</sup>

Season-to-Date October - July						
Country	Volume			FOB Value/SSG <sup>c</sup>		
	2018-19	2019-20	Change	2018-19	2019-20	Change
	- million SSE gallons -		- % -	- \$/SSE gallon -		- % -
Canada	1.34	1.25	-7.1	6.05	5.41	-10.5
Europe	1.56	1.06	-32.0	5.33	5.25	-1.6
Japan	0.88	0.68	-23.5	5.04	5.46	+8.4
Other	1.21	1.11	-8.1	4.39	4.42	+0.8
<b>TOTAL</b>	<b>4.99</b>	<b>4.09</b>	<b>-18.0</b>	<b>5.24</b>	<b>5.11</b>	<b>-2.6</b>

<sup>a</sup> SOURCE: U.S. Department of Commerce.

<sup>b</sup> FDOC Processor exports of GJ for the 2019-20 season were up 14.4%, season-to-date through 08/29/20.

<sup>c</sup> The FOB value of the products reported by the exporter, which does not include duties, freight, custom fees or other charges, divided by the reported number of single strength gallons.

# U.S. Retail Grapefruit Juice Sales

## Expanded All Outlets Combined (xAOC)<sup>a</sup>

Item	Volume Sales			Dollar Sales			Price/Eq Gallon		
	2017-18	2018-19	Change	2017-18	2018-19	Change	2017-18	2018-19	Change
	- million SSE gallons -		- % -	- million dollars -		- % -	- \$/SSE gallon -		- % -
Full Season Results for the Previous Two Seasons									
Refrigerated	9.25	8.22	-11.1	76.02	73.42	-3.4	8.22	8.93	+8.6
NFC	8.77	8.11	-7.6	72.82	71.79	-1.4	8.30	8.86	+6.7
RECON	0.48	0.12	-75.2	3.20	1.63	-49.1	6.72	13.78	+105.2
FCGJ	0.09	0.38	+321.0	0.44	1.82	+312.3	4.84	4.74	-2.1
Shelf Stable	3.69	3.02	-18.2	22.84	20.05	-12.2	6.18	6.64	+7.4
TOTAL	13.04	11.63	-10.8	99.30	95.29	-4.0	7.62	8.19	+7.6
Season-to-Date through 08/29/20, Topline Report #12									
	2018-19	2019-20	Change	2018-19	2019-20	Change	2018-19	2019-20	Change
Refrigerated	7.63	8.14	+6.6	67.99	77.00	+13.3	8.91	9.46	+6.2
NFC	7.53	7.91	+5.1	66.54	72.82	+9.4	8.84	9.20	+4.1
RECON	0.11	0.23	+111.5	1.45	4.18	+188.8	13.59	18.57	+36.6
FCOJ	0.35	0.44	+28.0	1.64	1.74	+6.1	4.72	3.91	-17.1
Shelf Stable	2.81	2.76	-1.9	18.61	20.06	+7.8	6.62	7.28	+9.9
TOTAL	10.79	11.34	+5.1	88.24	98.80	+12.0	8.18	8.71	+6.6

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

## Florida Fresh Grapefruit Shipments Season-to-Date through 07/31/20

Destination/Variety	2018-19 STD	2019-20 STD	Change
- 1,000 4/5-bu. cartons -			- % -
<b>Domestic &amp; Canadian - All</b>	<b>2,172</b>	<b>2,551</b>	<b>+17.4</b>
White	44	81	+84.8
Red/Pink	2,128	2,470	+16.1
<b>Offshore Exports - All</b>	<b>1,400</b>	<b>1,536</b>	<b>+9.7</b>
White	355	267	-24.7
Red/Pink	1,046	1,269	+21.4
<b>TOTAL - All</b>	<b>3,572</b>	<b>4,087</b>	<b>+14.4</b>
White	399	349	-12.6
Red/Pink	3,174	3,739	+17.8

Source: DFVI, Florida Dept. of Agriculture

## Florida Fresh Grapefruit Shipments Season-to-Date through 07/31/20

Country	2018-19 STD	2019-20 STD	Change
- 1,000 4/5-bu. cartons -			- % -
United States	1,872	2,236	+19.4
Canada	300	315	+5.0
Europe	517	707	+36.6
Japan	652	581	-10.9
Other	231	249	+7.8
<b>TOTAL - All</b>	<b>3,572</b>	<b>4,087</b>	<b>+14.4</b>

Source: DFVI, Florida Dept. of Agriculture



**Florida Fresh Grapefruit Domestic FOB Prices**  
**Season-to-Date through 05/17/20**

Variety	FOB Price		
	2018-19 Final	2019-20 STD	Change
	- \$ / carton -		- % -
<b>TOTAL<sup>a</sup></b>	<b>17.69</b>	<b>15.96</b>	<b>-9.8</b>
<b>White</b>	<b>16.66</b>	<b>17.76</b>	<b>+6.6</b>
<b>Red/Pink</b>	<b>17.82</b>	<b>15.79</b>	<b>-11.4</b>

<sup>a</sup>Weighted average based on FDACS reporting of fresh fruit shipments.  
Source: Citrus Administrative Committee

## Foreign Exchange Rates Per USD

Date	Euro	Real	Yen
<b>Annual</b>			
2015	0.9013	3.329	121.02
2016	0.9042	3.492	108.91
2017	0.8871	3.188	112.14
2018	0.8472	3.640	110.38
2019	0.8932	3.944	109.02
2019 (through August)	0.8877	3.857	109.33
2020 (through August)	0.8836	5.024	107.71
% Change	-0.5	+30.3	-1.5
<b>Average for Month of August</b>			
2019	0.8980	4.0104	106.20
2020	0.8457	5.4378	105.99
% Change	-5.8	+35.6	-0.2