

# Florida Citrus Economic & Market Indicators March 2020

Florida Department of  
Citrus

Economic and Market  
Research



# Florida Citrus Economic & Market Indicators

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<b>Summary Comments.....</b>	<b>3</b>
<b>Oranges &amp; Specialty Fruit</b>	
· Brazil Orange Juice Exports.....	4
· Florida FCOJ Availability, Movement and Inventory.....	5
· Florida SSOJ Availability, Movement and Inventory.....	6
· U.S. Orange Juice Imports.....	7
· U.S. Orange Juice Exports.....	8
· Non-FDOC Processor FCOJ Disappearance Index.....	9
· U.S. Retail Orange Juice Sales Expanded All Outlets Combined (xAOC).....	10
· U.S. Retail NFC Orange Juice Promotional Pricing (xAOC).....	10a
· U.S. Retail NFC Orange Juice Sales by Unit Size (xAOC).....	10b
· FCOJ Futures.....	11
· FCOJ Prices.....	12
· FDOC Processor Delivered-In Prices.....	13
· Sao Paulo Processed Orange Delivered-In Prices.....	14
· Florida Fresh Orange and Specialty Fruit Shipments and FOB Prices, Season-to-Date.....	15
· Selected Competitive Fresh Fruit Shipments.....	16
<b>Grapefruit</b>	
· Florida FCGJ Availability, Movement and Inventory.....	17
· Florida SSGJ Availability, Movement and Inventory.....	18
· U.S. Grapefruit Juice Exports.....	19
· U.S. Retail Grapefruit Juice Sales Expanded All Outlets Combined (xAOC).....	20
· Florida Fresh Grapefruit Shipments, Season-to-Date.....	21
· Florida Fresh Grapefruit Domestic and Export Certified Shipments.....	22
· Florida Fresh Grapefruit Domestic FOB Prices, Season-to-Date.....	23
<b>Foreign Exchange Rates Per USD.....</b>	<b>24</b>

## Summary Comments

- Brazil's OJ exports for 2019-20 Brazilian season (July-February) were up 9.6% from the previous 3 season average with exports to the NAFTA region, Europe and the Far East down 15.6%, up 19.5% and up 28.7%, respectively.
- Season-to-date through 02/29/20, Florida FCOJ availability, movement and ending inventories were up 9.8%, down 7.0%, and up 18.8% respectively, from last season.
- Season-to-date through 02/29/20, Florida SSOJ availability, movement and ending inventories were up 11.0%, up 0.3%, and up 15.3% respectively, from last season.
- For October through January of the 2019-20 season, U.S. OJ imports and exports were down 32.3% and up 4.9% from last season, respectively. Season-to-date through 02/29/20, Florida OJ exports were down 41.2% (FDOC Processors Report).
- For October through January of the 2019-20 season, Non-FDOC Processor FCOJ disappearance, based on FCOJ inventories and imports, was up 113.6%.
- Season-to-date through 02/15/20, 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 down 2.3% from the previous season, with the NFC price down 1.1%, the Recon price down 1.1% and the overall OJ price down 1.6%.
- The average FCOJ Futures price was \$0.98/PS, down \$0.21/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. Late season Orange prices cannot be compared.
- Season-to-date through 02/09/20, fresh orange and specialty citrus shipments were up 20.6% from last season.
- From August through January of the 2019-20 season, clementine and tangerine imports were down 31.5% relative to last season. Season-to-date through 02/29/20, Texas fresh grapefruit shipments were up 2.4% relative to last season.
- Season-to-date through 02/29/20, Florida FCGJ availability, movement and ending inventories were down 7.1%, down 52.3%, and up 11.9% respectively, from last season.
- Season-to-date through 02/29/20, Florida SSGJ availability, movement and ending inventories were up 10.9%, down 13.0%, and up 15.8% respectively, from last season.
- For October through January of the 2019-20 season, U.S. GJ exports were down 46.6%. Season-to-date through 02/29/20, Florida GJ exports were down 49.2% (FDOC Processors report).
- Season-to-date through 02/15/20, 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 down 7.0% from the previous season, with the overall GJ price up 5.4%.
- Season-to-date through 02/09/20, Florida fresh grapefruit shipments were up 5.3% from last season, with Domestic/Canadian shipments up 1.7% and offshore shipments up 10.3% (DFVI). Shipments to Europe and Japan were up 47.2% and down 16.6%, respectively. Domestic FOB prices (CAC) for fresh white and red/pink grapefruit were down 11.5% and down 13.4%, respectively.
- For the month of February, versus the same period last year, the Euro/USD, Real/USD, and Yen/USD exchange rates were up 4.0%, up 16.8%, and down 0.3% respectively.

## Brazil Orange Juice Exports

Destination		Season-to-date (July-February)				Change from 3 season average
		2016-17	2017-18	2018-19	2019-20	
million SSE Gallons						%
NAFTA <sup>b</sup>	Total	190.5	268.5	220.7	191.1	-15.6
	FCOJ	113.5	165.8	102.1	108.1	-15.0
	SSOJ	77.0	102.6	118.7	83.0	-16.5
Europe <sup>c</sup>	Total	595.2	697.2	637.0	768.5	+19.5
	FCOJ	432.0	553.7	480.3	607.4	+24.3
	SSOJ	163.3	143.5	156.6	161.1	+4.3
East Asia <sup>d</sup>	Total	69.1	94.5	83.0	105.8	+28.7
Others	Total	65.3	58.9	51.7	42.4	-27.7
Total		920.1	1,119.0	992.4	1,107.8	+9.6

<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 02/29/20 (FDOC Processor Week 22)		
	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>40.0</b>	<b>48.4</b>	<b>+20.8</b>
<b>Imports<sup>a</sup></b>	<b>313.9</b>	<b>304.4</b>	<b>-3.0</b>	<b>116.9</b>	<b>73.3</b>	<b>-37.3</b>
<b>Availability</b>	<b>547.2</b>	<b>634.8</b>	<b>+16.0</b>	<b>400.1</b>	<b>439.4</b>	<b>+9.8</b>
<b>Movement</b>	<b>303.5</b>	<b>317.0</b>	<b>+4.5</b>	<b>139.0</b>	<b>129.3</b>	<b>-7.0</b>
Bulk	237.3	251.6	+6.1	113.2	103.0	-9.0
Packaged	66.2	65.4	-1.2	25.8	26.2	+1.6
<b>Ending Inventory</b>	<b>243.7</b>	<b>317.8</b>	<b>+30.4</b>	<b>261.1</b>	<b>310.1</b>	<b>+18.8</b>
Bulk	237.8	311.9	+31.2	255.7	302.8	+18.4
Packaged	5.9	5.8	-1.6	5.3	7.4	+38.7
	- weeks supply -		- % -	- weeks supply -		- % -
<b>Carry Over - STD<sup>b</sup></b>	<b>41.8</b>	<b>52.1</b>	<b>+24.8</b>	<b>41.3</b>	<b>52.8</b>	<b>+27.8</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 02/29/20 (FDOC Processor Week 22)		
	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>117.3</b>	<b>119.0</b>	<b>+1.5</b>
<b>Imports<sup>a</sup></b>	<b>104.9</b>	<b>119.3</b>	<b>+13.8</b>	<b>79.2</b>	<b>28.4</b>	<b>-64.1</b>
<b>Availability</b>	<b>491.8</b>	<b>562.3</b>	<b>+14.3</b>	<b>321.0</b>	<b>356.5</b>	<b>+11.0</b>
<b>Movement<sup>b</sup></b>	<b>365.4</b>	<b>347.5</b>	<b>-4.9</b>	<b>155.1</b>	<b>155.6</b>	<b>+0.3</b>
Bulk	26.7	20.0	-24.9	8.0	10.8	+35.0
Packaged	338.7	327.4	-3.3	147.1	144.7	-1.6
<b>Ending Inventory</b>	<b>124.6</b>	<b>209.0</b>	<b>+67.8</b>	<b>163.5</b>	<b>188.6</b>	<b>+15.3</b>
Bulk	119.7	203.5	+70.0	157.7	183.6	+16.5
Packaged	4.9	5.5	+13.0	5.9	5.0	-14.9
	- weeks supply -		- % -	- weeks supply -		- % -
<b>Carry Over - STD<sup>c</sup></b>	<b>17.7</b>	<b>31.3</b>	<b>+76.4</b>	<b>23.2</b>	<b>26.7</b>	<b>+15.0</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 - January						
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	95.86	82.19	-14.3	1.48	1.28	-13.5
CBI <sup>b</sup>	3.00	0.42	-86.0	1.94	2.26	+16.5
Mexico	56.57	22.26	-60.7	2.00	2.02	+1.0
Other	0.59	0.72	+22.0	3.32	2.75	-17.2
<b>TOTAL</b>	<b>156.02</b>	<b>105.59</b>	<b>-32.3</b>	<b>1.69</b>	<b>1.45</b>	<b>-14.2</b>
<b>NFC OJ</b>						
Brazil	57.82	30.42	-47.4	1.58	1.54	-2.5
CBI <sup>b</sup>	0.00	0.00	N/A	5.40	0.00	-100.0
Mexico	4.08	3.36	-17.6	2.56	2.82	+10.2
Other	0.02	0.00	-100.0	4.25	16.22	+281.6
<b>TOTAL</b>	<b>61.92</b>	<b>33.79</b>	<b>-45.4</b>	<b>1.65</b>	<b>1.67</b>	<b>+1.2</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 - January						
Country	Volume			FOB Value/SSG <sup>c</sup>		
	2018-19	2019-20	Change	2018-19	2019-20	Change
	- million SSE gallons -		- % -	- \$/SSE gallon -		- % -
Canada	10.20	10.16	-0.4	5.14	5.18	+0.8
Europe	0.07	0.67	+857.1	4.89	3.68	-24.7
Japan	0.07	0.02	-71.4	5.76	4.24	-26.4
Other	3.80	3.98	+4.7	5.66	6.78	+19.8
<b>TOTAL</b>	<b>14.14</b>	<b>14.83</b>	<b>+4.9</b>	<b>5.23</b>	<b>5.21</b>	<b>-0.4</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 41.2%, season-to-date through 02/29/20.

<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 - January		
	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>23.3</u></b>	<b><u>43.9</u></b>	<b><u>+88.0</u></b>
<b>Availability<sup>c</sup></b>	<b>35.6</b>	<b>65.5</b>	<b>+83.9</b>
<b>Ending Inventory<sup>a</sup></b>	<b><u>13.9</u></b>	<b><u>19.1</u></b>	<b><u>+37.5</u></b>
<b>Non-FDOC Processor FCOJ Disappearance<sup>d</sup></b>	<b>21.7</b>	<b>46.4</b>	<b>+113.6</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 02/15/20, Topline Report #5									
	2018-19	2019-20	Change	2018-19	2019-20	Change	2018-19	2019-20	Change
Refrigerated	149.09	146.28	-1.9	1,052.69	1,041.48	-1.1	7.06	7.12	+0.8
NFC	95.36	92.56	-2.9	788.71	780.35	-1.1	8.27	8.43	+1.9
RECON	53.73	53.71	0.0	263.98	261.14	-1.1	4.91	4.86	-1.0
FCOJ	6.31	5.95	-5.6	31.23	29.84	-4.5	4.95	5.01	+1.2
Shelf Stable	5.08	4.56	-10.1	37.75	32.93	-12.8	7.43	7.21	-3.0
TOTAL	160.48	156.79	-2.3	1,121.66	1,104.25	-1.6	6.99	7.04	+0.8

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		
	7/6/2019	10/26/2019	02/15/20	7/6/2019	10/26/2019	02/15/20
<b>Non-Promotional Price</b>						
NFC <11 oz	\$4.05	\$4.05	\$4.06	\$12.19	\$12.16	\$12.21
NFC 11-20 oz	\$1.93	\$1.90	\$1.83	\$16.30	\$16.12	\$16.04
NFC 20-50 oz	\$3.82	\$3.87	\$3.94	\$15.09	\$15.31	\$15.56
NFC 50-70 oz	\$3.73	\$3.74	\$3.69	\$8.58	\$8.75	\$8.63
NFC 70-110 oz	\$5.86	\$5.86	\$5.84	\$8.44	\$8.44	\$8.41
NFC >110 oz	\$6.70	\$6.70	\$6.74	\$6.70	\$6.70	\$6.74
<b>Promotional Price<sup>a</sup></b>						
NFC <11 oz	\$3.23	\$3.04	\$3.58	\$10.20	\$10.17	\$10.35
NFC 11-20 oz	\$1.31	\$1.36	\$1.39	\$13.20	\$13.27	\$13.73
NFC 20-50 oz	\$2.95	\$3.01	\$3.48	\$11.66	\$12.11	\$14.28
NFC 50-70 oz	\$3.09	\$3.12	\$3.07	\$7.52	\$7.60	\$7.51
NFC 70-110 oz	\$5.51	\$5.54	\$5.52	\$7.94	\$7.98	\$7.96
NFC >110 oz	\$6.95	\$6.07	\$6.17	\$6.95	\$6.07	\$6.17

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.

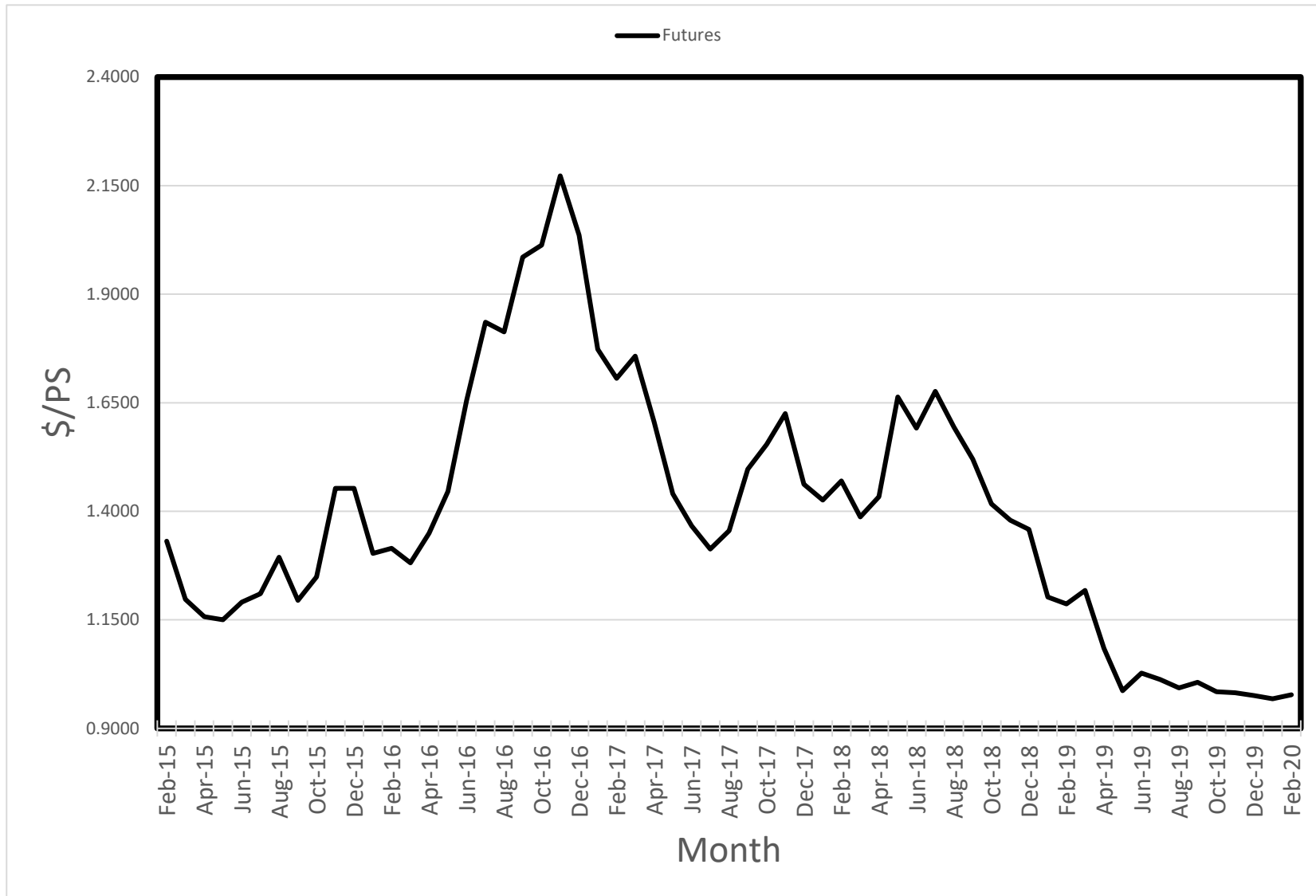
## U.S. Retail NFC Orange Juice Sales by Unit Size (xAOC)

Unit Sizes	Dollar Sales			Gallon Sales		
	16 Week Period Ending			16 Week Period Ending		
	7/6/2019	10/26/2019	02/15/20	7/6/2019	10/26/2019	02/15/20
NFC <11 oz	\$8,830,037	\$8,969,804	\$9,153,821	734,917	748,535	761,473
NFC 11-20 oz	\$32,567,414	\$32,967,406	\$34,336,594	2,105,555	2,147,354	2,218,464
NFC 20-50 oz	\$7,328,170	\$7,646,309	\$8,864,074	501,685	515,768	577,636
NFC 50-70 oz	\$350,067,937	\$332,332,278	\$402,702,131	43,142,940	40,173,249	49,743,198
NFC 70-110 oz	\$143,135,148	\$138,416,289	\$164,693,381	17,179,505	16,580,695	19,818,669
NFC >110 oz	\$20,523,830	\$19,383,584	\$21,285,294	3,061,146	2,914,472	3,178,590
<b>% Sold on Promotion<sup>a</sup></b>						
NFC <11 oz	7.5%	7.4%	8.6%	8.8%	8.7%	10.0%
NFC 11-20 oz	22.9%	23.2%	21.5%	26.8%	26.8%	24.3%
NFC 20-50 oz	11.2%	12.3%	15.4%	14.0%	15.1%	16.6%
NFC 50-70 oz	40.6%	38.0%	44.4%	43.9%	41.4%	47.8%
NFC 70-110 oz	20.3%	18.8%	20.9%	21.3%	19.7%	21.8%
NFC >110 oz	2.0%	7.2%	7.5%	1.9%	7.9%	8.2%

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 February 2015 through February 2020



## FCOJ Prices February

Item	2019	2020	Change
- \$ / PS -			- % -
FCOJ Futures	1.1865	0.9772	-17.6

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	-56.1
Late Season Oranges <sup>b</sup>	N/A	\$1.13	N/A
White Grapefruit <sup>c</sup>	N/A	N/A	N/A
Red/Pink Grapefruit <sup>c</sup>	\$3.45	\$2.03	-41.1

<sup>a</sup> 2019-20 Season final price from 02/22/20. 2018-19 Season final price from 03/02/19.

<sup>b</sup> 2019-20 STD price through 02/29/20. 2018-19 STD price through 03/02/19.

<sup>c</sup> 2019-20 STD price through 02/29/20. 2018-19 STD price through 03/02/19.

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

Season	February Average		Season-to-Date <sup>a</sup> (July - February)	
	Price	Change from Year Ago	Price	Change from Year Ago
	- \$ / box <sup>b</sup> -	- % -	- \$ / box <sup>b</sup> -	- % -
<b>2017-18</b>	<b>5.15</b>		<b>5.77</b>	
<b>2018-19</b>	<b>5.70</b>	<b>+10.7</b>	<b>5.69</b>	<b>-1.3</b>
<b>2019-20</b>	<b>4.88</b>	<b>-14.4</b>	<b>4.96</b>	<b>-12.8</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 02/09/20			FOB Price through 02/23/20		
	2018-19 STD	2019-20 STD	Change	2018-19 Final	2019-20 STD	Change
	- 1,000 of 4/5 bu. cartons -		- % -	- \$ / carton -		- % -
Early & Mid Oranges	1,478	1,758	+19.0	15.07	12.37	-17.9
Navel	651	755	+16.1	17.60	15.44	-12.3
Valencia	8	15	+82.6	N/A	12.58	N/A
Tangelo	112	130	+16.6	16.07	24.13	+50.2
Early Tangerines <sup>a</sup>	536	733	+36.6	21.37	23.43	+9.6
Honey / Murcotts	62	46	-26.0	29.67	23.47	-20.9
Royal Tangerines / Temples	11	10	-8.8	17.91	N/A	N/A
<b>TOTAL</b>	<b>2,858</b>	<b>3,448</b>	<b>+20.6</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 - January			STD - 02/29/20		
- million pounds -		- % -	- thousand 7/10 bu. Cartons -		- % -
393.0	269.4	-31.5	Total 3,125	3,199	+2.4
			Export 272	18	-93.4
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 02/29/20 (FDOC Processor Week 22)		
	2017-18	2018-19	Change	2018-19	2019-20	Change
	- million PS -		- % -	- million PS -		- % -
<b>Beginning Inventory</b>	<b>9.5</b>	<b>5.2</b>	<b>-45.8</b>	<b>5.2</b>	<b>6.8</b>	<b>+32.2</b>
<b>Pack from Fruit</b>	<b>2.3</b>	<b>2.7</b>	<b>+19.5</b>	<b>1.4</b>	<b>1.6</b>	<b>+9.7</b>
<b>Imports<sup>a</sup></b>	<b>4.5</b>	<b>2.4</b>	<b>-46.0</b>	<b>2.4</b>	<b>0.0</b>	<b>-100.0</b>
<b>Availability</b>	<b>16.4</b>	<b>10.3</b>	<b>-36.7</b>	<b>9.1</b>	<b>8.4</b>	<b>-7.1</b>
<b>Movement</b>	<b>11.7</b>	<b>4.9</b>	<b>-57.9</b>	<b>2.6</b>	<b>1.2</b>	<b>-52.3</b>
Bulk	11.6	4.7	-58.9	2.5	1.2	-53.2
Packaged	0.1	0.2	+44.8	0.1	0.1	-15.7
<b>Ending Inventory</b>	<b>5.2</b>	<b>6.9</b>	<b>+31.7</b>	<b>7.1</b>	<b>7.9</b>	<b>+11.9</b>
Bulk	5.2	6.8	+31.8	7.1	7.9	+11.9
Packaged	0.0	0.0	-3.0	0.0	0.0	+0.3
	- - weeks supply - -		- % -	- - weeks supply - -		- % -
<b>Carry Over<sup>b</sup></b>	<b>23.2</b>	<b>72.7</b>	<b>+212.8</b>	<b>61.2</b>	<b>143.5</b>	<b>+134.3</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: 02/29/20 (FDOC Processor Week 22)		
	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>6.7</b>	<b>7.9</b>	<b>+17.4</b>
<b>Imports<sup>a</sup></b>	<b>4.4</b>	<b>4.7</b>	<b>+7.3</b>	<b>2.5</b>	<b>1.4</b>	<b>-42.9</b>
<b>Availability</b>	<b>19.3</b>	<b>20.3</b>	<b>+5.1</b>	<b>16.1</b>	<b>17.8</b>	<b>+10.9</b>
<b>Movement</b>	<b>12.4</b>	<b>11.0</b>	<b>-11.5</b>	<b>4.6</b>	<b>4.0</b>	<b>-13.0</b>
Bulk	1.2	0.5	-58.7	0.2	-0.1	-156.3
Packaged	11.2	10.5	-6.5	4.4	4.1	-7.1
<b>Ending Inventory</b>	<b>6.8</b>	<b>8.5</b>	<b>+25.3</b>	<b>11.4</b>	<b>13.2</b>	<b>+15.8</b>
Bulk	6.7	8.4	+25.5	11.2	13.0	+15.7
Packaged	0.1	0.2	+14.6	0.2	0.2	+24.4
	- - weeks supply - -		- % -	- - weeks supply - -		- % -
<b>Carry Over<sup>b</sup></b>	<b>28.6</b>	<b>40.5</b>	<b>+41.6</b>	<b>54.7</b>	<b>72.8</b>	<b>+33.1</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 - January						
Country	Volume			FOB Value/SSG <sup>c</sup>		
	2018-19	2019-20	Change	2018-19	2019-20	Change
	- million SSE gallons -		- % -	- \$/SSE gallon -		- % -
Canada	0.52	0.32	-38.5	5.68	6.32	+11.3
Europe	0.95	0.41	-56.8	5.34	4.11	-23.0
Japan	0.44	0.19	-56.8	5.02	4.79	-4.6
Other	0.47	0.35	-25.5	4.25	4.66	+9.6
<b>TOTAL</b>	<b>2.38</b>	<b>1.27</b>	<b>-46.6</b>	<b>5.14</b>	<b>4.91</b>	<b>-4.5</b>

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

<sup>b</sup> FDOC Processor exports of GJ for the 2019-20 season were down 49.2%, season-to-date through 02/29/20.

<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 02/15/20, Topline Report #5									
	2018-19	2019-20	Change	2018-19	2019-20	Change	2018-19	2019-20	Change
Refrigerated	3.21	3.03	-5.6	28.00	27.61	-1.4	8.71	9.10	+4.4
NFC	3.18	2.96	-7.0	27.61	26.28	-4.8	8.68	8.88	+2.3
RECON	0.03	0.08	+125.4	0.39	1.33	+240.3	11.71	17.67	+51.0
FCGJ	0.11	0.18	+60.6	0.53	0.81	+54.1	4.75	4.56	-4.1
Shelf Stable	1.22	1.02	-16.8	7.72	7.10	-8.0	6.31	6.98	+10.6
TOTAL	4.55	4.23	-7.0	36.25	35.52	-2.0	7.97	8.40	+5.4

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 02/09/20

Destination/Variety	2018-19 STD	2019-20 STD	Change
- 1,000 4/5-bu. cartons -			- % -
<b>Domestic &amp; Canadian - All</b>	<b>1,472</b>	<b>1,497</b>	<b>+1.7</b>
White	29	45	+55.0
Red/Pink	1,443	1,452	+0.7
<b>Offshore Exports - All</b>	<b>1,066</b>	<b>1,176</b>	<b>+10.3</b>
White	290	206	-29.1
Red/Pink	776	970	+25.0
<b>TOTAL - All</b>	<b>2,538</b>	<b>2,673</b>	<b>+5.3</b>
White	319	251	-21.4
Red/Pink	2,219	2,422	+9.2

Source: DFVI, Florida Dept. of Agriculture

## Florida Fresh Grapefruit Shipments Season-to-Date through 02/09/20

Country	2018-19 STD	2019-20 STD	Change
- 1,000 4/5-bu. cartons -			- % -
United States	1,257	1,291	+2.7
Canada	215	206	-4.2
Europe	355	522	+47.2
Japan	528	441	-16.6
Other	184	213	+16.1
<b>TOTAL - All</b>	<b>2,538</b>	<b>2,673</b>	<b>+5.3</b>

Source: DFVI, Florida Dept. of Agriculture



**Florida Fresh Grapefruit Domestic FOB Prices**  
**Season-to-Date through 02/23/20**

Variety	FOB Price		
	2018-19	2019-20	Change
	Final	STD	
	- \$ / carton -		- % -
<b>TOTAL<sup>a</sup></b>	<b>17.67</b>	<b>15.37</b>	<b>-13.1</b>
<b>White</b>	<b>16.66</b>	<b>14.75</b>	<b>-11.5</b>
<b>Red/Pink</b>	<b>17.82</b>	<b>15.43</b>	<b>-13.4</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 February)	0.8783	3.732	109.62
2020 (through February)	0.9081	4.237	109.59
% Change	+3.4	+13.5	0.0
<b>Average for Month of February</b>			
2019	0.8809	3.7162	110.27
2020	0.9159	4.3410	109.92
% Change	+4.0	+16.8	-0.3