

# Florida Citrus Economic & Market Indicators February 2023

**Florida Department of Citrus**  
Economic and Market Research Department



# Florida Citrus Economic & Market Indicators

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## Summary Comments

- Brazil's OJ exports for 2022-23 Brazilian season July - January were down 11.2% from the previous 3 season average with exports to the USMCA region, Europe and the East Asia up 44.7%, down 25.5% and down 17.8%, respectively.
- Season-to-date through 01/28/23, Florida FCOJ availability, movement and ending inventories were down 28.2%, down 6.4%, and down 40.6% respectively, from last season.
- Season-to-date through 01/28/23, Florida SSOJ availability, movement and ending inventories were down 4.5%, down 2.7%, and down 6.8% respectively, from last season.
- For October through December of the 2022-23 season, U.S. OJ imports and exports were up 69.1% and down 29.2% from last season, respectively. Season-to-date through 01/28/23, Florida OJ exports were down 80.3% (FDOC Processors Report).
- For October through December of the 2022-23 season, Non-FDOC Processor FCOJ disappearance, based on FCOJ inventories and imports, was up 38.7%.
- Season-to-date through 01/28/23, 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 9.7% from the previous season, with the NFC price up 11.5%, the Recon price up 32.6% and the overall OJ price up 12.1%.
- The average FCOJ Futures price was \$2.06/PS, up \$0.56/PS from last year.
- Season-to-date through 02/11/23, the delivered-in price for early and midseason oranges was \$2.77/PS, up \$0.57/PS from last season. Late season Orange prices cannot be compared.
- Season-to-date through 01/29/23, fresh orange and specialty citrus shipments were down 33.4% from last season.
- From August through December of the 2022-23 season, clementine and tangerine imports were down 3.8% relative to last season. Season-to-date through 02/11/23, Texas fresh grapefruit shipments were up 35.1% relative to last season.
- Season-to-date through 01/28/23, Florida FCGJ availability, movement and ending inventories were down 36.6%, down 55.7%, and down 30.0% respectively, from last season.
- Season-to-date through 01/28/23, Florida SSGJ availability, movement and ending inventories were down 15.3%, down 10.0%, and down 18.7% respectively, from last season.
- For October through December of the 2022-23 season, U.S. GJ exports were down 29.7%. Season-to-date through 01/28/23, Florida GJ exports were down 98.8% (FDOC Processors report).
- Season-to-date through 01/28/23, 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 6.0% from the previous season, with the overall GJ price up 9.4%.
- Season-to-date through 01/29/23, Florida fresh grapefruit shipments were down 33.1% from last season, with Domestic/Canadian shipments down 24.5% and offshore shipments down 61.2% (DFVI). Shipments to Europe and Japan were down 54.6% and down 62.5%, respectively. Domestic FOB prices (CAC) for fresh white and red/pink grapefruit were up 7.6% and up 6.9%, respectively.
- For the month of January, versus the same period last year, the Euro/USD, Real/USD, and Yen/USD exchange rates were up 6.3%, down 4.3%, and up 14.8% respectively.



## Brazil Orange Juice Exports

Destination		Season-to-date July - January				Change from 3 season average
		2019-20	2020-21	2021-22	2022-23	
million SSE Gallons						%
USMCA <sup>b</sup>	Total	178.4	188.2	164.8	256.3	+44.7
	FCOJ	102.3	105.1	76.1	138.2	+46.2
	SSOJ	76.1	83.1	88.7	118.1	+43.0
Europe <sup>c</sup>	Total	697.6	577.6	545.5	451.9	-25.5
	FCOJ	552.7	427.7	413.6	343.6	-26.1
	SSOJ	144.9	149.9	131.9	108.3	-23.9
East Asia <sup>d</sup>	Total	97.4	82.1	114.2	80.5	-17.8
Others	Total	36.3	47.5	42.6	32.2	-23.5
Total		1,009.8	895.4	867.0	820.9	-11.2

<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 01/28/23 (FDOC Processor Week 17)		
	2020-21	2021-22	Change	2021-22	2022-23	Change
	- million PS -		- % -	- million PS -		- % -
<b>Beginning Inventory</b>	<b>259.7</b>	<b>232.7</b>	<b>-10.4</b>	<b>232.7</b>	<b>125.7</b>	<b>-46.0</b>
<b>Pack from Fruit</b>	<b>30.2</b>	<b>20.3</b>	<b>-32.8</b>	<b>8.0</b>	<b>1.3</b>	<b>-83.2</b>
<b>Imports<sup>a</sup></b>	<b>227.1</b>	<b>196.0</b>	<b>-13.7</b>	<b>29.5</b>	<b>66.8</b>	<b>+126.5</b>
<b>Availability</b>	<b>517.0</b>	<b>449.1</b>	<b>-13.1</b>	<b>270.2</b>	<b>193.9</b>	<b>-28.2</b>
<b>Movement</b>	<b>284.3</b>	<b>323.3</b>	<b>+13.7</b>	<b>97.8</b>	<b>91.5</b>	<b>-6.4</b>
Bulk	228.0	260.0	+14.0	78.5	72.1	-8.1
Packaged	56.3	63.4	+12.6	19.4	19.4	+0.2
<b>Ending Inventory</b>	<b>232.7</b>	<b>125.7</b>	<b>-46.0</b>	<b>172.4</b>	<b>102.4</b>	<b>-40.6</b>
Bulk	226.7	119.1	-47.4	166.0	96.5	-41.9
Packaged	6.1	6.6	+8.6	6.4	5.9	-7.9
	- weeks supply -		- % -	- weeks supply -		- % -
<b>Carry Over - STD<sup>b</sup></b>	<b>42.6</b>	<b>20.2</b>	<b>-52.5</b>	<b>30.0</b>	<b>19.0</b>	<b>-36.5</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 01/28/23 (FDOC Processor Week 17)		
	2020-21	2021-22	Change	2021-22	2022-23	Change
	- million PS -		- % -	- million PS -		- % -
<b>Beginning Inventory</b>	<b>149.7</b>	<b>124.6</b>	<b>-16.7</b>	<b>124.6</b>	<b>93.4</b>	<b>-25.0</b>
<b>Pack from Fruit</b>	<b>241.2</b>	<b>174.0</b>	<b>-27.8</b>	<b>67.5</b>	<b>24.2</b>	<b>-64.2</b>
<b>Imports<sup>a</sup></b>	<b>108.1</b>	<b>154.0</b>	<b>+42.5</b>	<b>33.8</b>	<b>98.1</b>	<b>+190.7</b>
<b>Availability</b>	<b>498.9</b>	<b>452.6</b>	<b>-9.3</b>	<b>225.8</b>	<b>215.7</b>	<b>-4.5</b>
<b>Movement<sup>b</sup></b>	<b>367.2</b>	<b>354.6</b>	<b>-3.4</b>	<b>127.2</b>	<b>123.7</b>	<b>-2.7</b>
Bulk	13.4	11.4	-14.6	2.9	3.9	+34.5
Packaged	353.9	343.2	-3.0	124.3	119.8	-3.6
<b>Ending Inventory</b>	<b>124.6</b>	<b>93.4</b>	<b>-25.0</b>	<b>98.5</b>	<b>91.9</b>	<b>-6.8</b>
Bulk	119.4	87.9	-26.4	93.6	85.7	-8.5
Packaged	5.1	5.5	+6.9	4.9	6.1	+26.2
	- weeks supply -		- % -	- weeks supply -		- % -
<b>Carry Over - STD<sup>c</sup></b>	<b>17.6</b>	<b>13.7</b>	<b>-22.4</b>	<b>13.2</b>	<b>12.6</b>	<b>-4.1</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 - December						
Country	Volume			FOB Value/SSG <sup>c</sup>		
	2021-22	2022-23	Change	2021-22	2022-23	Change
<b>TOTAL OJ</b>						
	- million SSE gallons -		- % -	- \$/SSE gallon -		- % -
Brazil	65.22	122.55	+87.9	1.35	1.67	+23.3
CBI <sup>b</sup>	0.01	0.00	-85.9	5.84	7.64	+30.8
Mexico	15.63	14.26	-8.8	2.23	2.77	+24.2
Other	2.20	3.62	+64.8	2.21	2.30	+4.0
<b>TOTAL</b>	<b>83.06</b>	<b>140.43</b>	<b>+69.1</b>	<b>1.54</b>	<b>1.80</b>	<b>+16.5</b>
<b>NFC OJ</b>						
Brazil	36.12	60.82	+68.4	1.48	1.58	+6.7
CBI <sup>b</sup>	0.00	0.00	N/A	0.00	0.00	N/A
Mexico	3.79	2.02	-46.6	2.64	3.60	+36.3
Other	0.96	0.31	-68.0	1.24	4.94	+297.5
<b>TOTAL</b>	<b>40.87</b>	<b>63.14</b>	<b>+54.5</b>	<b>1.58</b>	<b>1.66</b>	<b>+4.9</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 - December						
Country	Volume			FOB Value/SSG <sup>c</sup>		
	2021-22	2022-23	Change	2021-22	2022-23	Change
	- million SSE gallons -		- % -	- \$/SSE gallon -		- % -
Canada	7.16	6.14	-14.2	4.87	5.16	+5.8
Europe	0.10	0.25	+152.9	4.73	3.79	-19.7
Japan	0.17	0.04	-78.3	4.68	4.71	+0.7
Other	3.29	1.16	-64.6	5.21	5.69	+9.1
<b>TOTAL</b>	<b>10.72</b>	<b>7.59</b>	<b>-29.2</b>	<b>4.97</b>	<b>5.19</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 2022-23 season were down 80.3%, season-to-date through 01/28/23.

<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 - December		
	2021-22	2022-23	Change
- million SSE gallons -			- % -
<b>Beginning Inventory<sup>a</sup></b>	<b>24.6</b>	<b>21.9</b>	<b>-10.9</b>
<b>Foreign Imports<sup>b</sup></b>	<b><u>23.9</u></b>	<b><u>23.9</u></b>	<b><u>+0.0</u></b>
<b>Availability<sup>c</sup></b>	<b>48.6</b>	<b>45.9</b>	<b>-5.5</b>
<b>Ending Inventory<sup>a</sup></b>	<b><u>20.7</u></b>	<b><u>7.2</u></b>	<b><u>-65.3</u></b>
<b>Non-FDOC Processor FCOJ Disappearance<sup>d</sup></b>	<b>27.9</b>	<b>38.7</b>	<b>+38.7</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		
	2020-21	2021-22	Change	2020-21	2021-22	Change	2020-21	2021-22	Change
	- million SSE gallons -		- % -	- million dollars -		- % -	- \$/SSE gallon -		- % -

### Full Season Results for the Previous Two Seasons

Refrigerated	397.80	379.48	-4.6	2,961.94	3,034.22	+2.4	7.45	8.00	+7.4
NFC	260.26	244.50	-6.1	2,294.14	2,317.75	+1.0	8.81	9.48	+7.5
RECON	137.54	134.98	-1.9	667.80	716.47	+7.3	4.86	5.31	+9.3
FCOJ	15.10	14.73	-2.4	77.46	78.52	+1.4	5.13	5.33	+3.9
Shelf Stable	14.75	13.32	-9.7	112.35	109.38	-2.6	7.62	8.21	+7.8
<b>TOTAL</b>	<b>427.65</b>	<b>407.53</b>	<b>-4.7</b>	<b>3,151.75</b>	<b>3,222.11</b>	<b>+2.2</b>	<b>7.37</b>	<b>7.91</b>	<b>+7.3</b>

### Season-to-Date through 01/28/23, Topline Report #4

	2021-22	2022-23	Change	2021-22	2022-23	Change	2021-22	2022-23	Change
Refrigerated	129.30	116.51	-9.9	996.71	1,007.59	+1.1	7.71	8.65	+12.2
NFC	86.12	67.88	-21.2	781.80	687.32	-12.1	9.08	10.13	+11.5
RECON	43.18	48.50	+12.3	214.91	320.12	+49.0	4.98	6.60	+32.6
FCOJ	4.86	4.65	-4.3	25.36	25.87	+2.0	5.22	5.56	+6.6
Shelf Stable	4.31	3.92	-9.0	33.76	35.24	+4.4	7.83	8.98	+14.7
<b>TOTAL</b>	<b>138.47</b>	<b>125.08</b>	<b>-9.7</b>	<b>1,055.83</b>	<b>1,068.70</b>	<b>+1.2</b>	<b>7.63</b>	<b>8.54</b>	<b>+12.1</b>

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		
	6/18/2022	10/8/2022	01/28/23	6/18/2022	10/8/2022	01/28/23
<b>Non-Promotional Price</b>						
NFC <11 oz	\$4.44	\$4.76	\$5.09	\$16.35	\$16.57	\$17.05
NFC 11-20 oz	\$1.92	\$2.01	\$2.08	\$20.41	\$21.33	\$22.10
NFC 20-50 oz	\$4.71	\$4.87	\$5.05	\$18.95	\$19.56	\$20.42
NFC 50-70 oz	\$4.11	\$4.27	\$4.47	\$9.66	\$10.00	\$10.38
NFC 70-110 oz	\$6.30	\$6.53	\$6.66	\$9.06	\$9.39	\$9.58
NFC >110 oz	\$7.53	\$7.84	\$8.12	\$7.29	\$7.84	\$8.12
<b>Promotional Price<sup>a</sup></b>						
NFC <11 oz	\$3.71	\$4.06	\$4.66	\$16.00	\$16.42	\$17.55
NFC 11-20 oz	\$1.70	\$1.70	\$1.75	\$18.08	\$18.30	\$18.89
NFC 20-50 oz	\$4.03	\$4.11	\$4.09	\$16.61	\$17.27	\$17.25
NFC 50-70 oz	\$3.51	\$3.58	\$3.66	\$8.53	\$8.76	\$8.91
NFC 70-110 oz	\$5.97	\$6.21	\$6.34	\$8.58	\$8.93	\$9.11
NFC >110 oz	\$6.76	\$6.73	\$7.07	\$6.76	\$6.73	\$7.07

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		
	6/18/2022	10/8/2022	01/28/23	6/18/2022	10/8/2022	01/28/23
NFC <11 oz	\$18,941,774	\$19,289,214	\$21,176,817	1,160,446	1,165,402	1,239,159
NFC 11-20 oz	\$32,736,682	\$31,981,554	\$33,390,707	1,631,981	1,549,790	1,554,041
NFC 20-50 oz	\$11,114,065	\$10,939,774	\$10,950,701	598,791	568,673	547,420
NFC 50-70 oz	\$438,781,136	\$405,009,626	\$446,313,714	47,184,124	42,108,894	45,627,918
NFC 70-110 oz	\$168,742,175	\$165,086,449	\$151,641,291	18,686,261	17,643,380	15,912,719
NFC >110 oz	\$25,618,932	\$24,200,105	\$23,845,300	3,522,855	3,106,713	2,997,942
<b>% Sold on Promotion<sup>a</sup></b>						
NFC <11 oz	7.1%	10.1%	8.7%	7.2%	10.2%	8.4%
NFC 11-20 oz	13.5%	20.4%	16.8%	15.0%	22.9%	19.2%
NFC 20-50 oz	14.9%	12.7%	11.3%	16.6%	14.1%	13.1%
NFC 50-70 oz	29.5%	28.2%	36.9%	32.2%	31.0%	40.5%
NFC 70-110 oz	6.4%	6.6%	10.4%	6.7%	6.9%	10.9%
NFC >110 oz	3.9%	4.2%	14.0%	4.2%	4.8%	15.7%

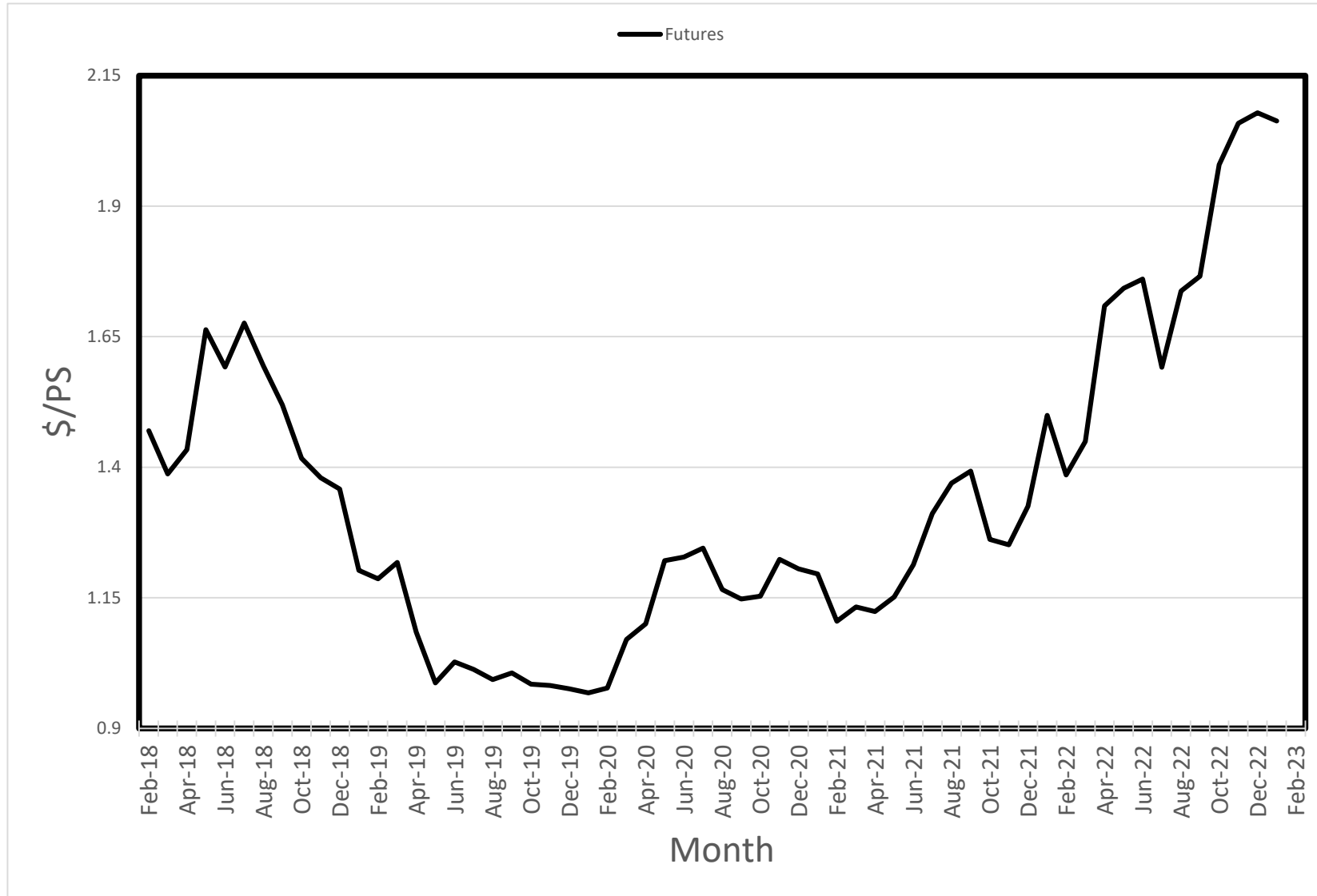
Source: Nielsen. xAOC = Expanded All Outlets Combined. xAOC data consists of POS data for U.S. grocery stores doing \$2 million and greater annual sales, drug stores doing \$1 million and greater annual sales, mass merchandisers (like Target), Walmart, club (Sam's and BJ's), dollar stores (Dollar General,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

January 2018 through January 2023



## FCOJ Prices January

Item	2022	2023	Change
	- \$ / PS -		- % -
<b>FCOJ Futures<sup>a</sup></b>	<b>1.4995</b>	<b>2.0631</b>	<b>+37.6</b>

SOURCES: TradingView.com



## FDOC Processor Delivered-In Prices

Variety	STD Prices Reported for Canner's A		
	2021-22	2022-23	Change
	- \$ / PS -		- % -
<b>Early &amp; Midseason Oranges<sup>a</sup></b>	<b>\$2.21</b>	<b>\$2.77</b>	<b>25.3%</b>
<b>Late Season Oranges<sup>b</sup></b>	<b>NA</b>	<b>NA</b>	<b>NA</b>
<b>White Grapefruit<sup>c</sup></b>	<b>\$2.74</b>	<b>NA</b>	<b>NA</b>
<b>Red/Pink Grapefruit<sup>c</sup></b>	<b>\$2.84</b>	<b>\$3.52</b>	<b>23.9%</b>

<sup>a</sup> 2022-23 STD price through 01/28/23. 2021-22 STD price through 01/29/22.

<sup>b</sup> Late season fruit has not begun for this season

<sup>c</sup> 2022-23 STD price through 01/28/23. 2021-22 STD price through 01/29/22.



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

Season	January Average		Season-to-Date <sup>a</sup> (July - January)	
	Price	Change from Year Ago	Price	Change from Year Ago
	- \$ / box <sup>b</sup> -	- % -	- \$ / box <sup>b</sup> -	- % -
<b>2020-21</b>	<b>4.72</b>		<b>4.46</b>	
<b>2021-22</b>	<b>5.26</b>	<b>+11.4</b>	<b>5.35</b>	<b>+20.1</b>
<b>2022-23</b>	<b>6.15</b>	<b>+16.9</b>	<b>6.01</b>	<b>+12.4</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 01/29/23			FOB Price through 01/29/23		
	2021-22 STD	2022-23 STD	Change	2020-21 Final	2022-23 STD	Change
	- 1,000 of 4/5 bu. cartons -		- % -	- \$ / carton -		- % -
Early & Mid Oranges	1,725	975	-43.5	15.84	18.42	+16.3
Navel	580	321	-44.6	19.30	24.00	+24.4
Valencia	101	102	+0.5	17.61	21.22	+20.5
Tangelo	76	23	-70.3	33.28	33.28	0.0
Early Tangerines <sup>a</sup>	367	460	+25.3	26.90	14.53	-46.0
Honey / Murcotts	35	40	+15.4	25.32	27.25	+7.6
Royal Tangerines / Temples	4	1	-72.7	24.00	N/A	N/A
<b>TOTAL</b>	<b>2,888</b>	<b>1,922</b>	<b>-33.4</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		
2021-22	2022-23	Change		2021-22	2022-23	Change
August - December				STD - 02/11/23		
- million pounds -		- % -	- 1,000 Equivalent <sup>1</sup> 4/5 Bu. Cartons -			- % -
435.4	418.7	-3.8	Total	1,044	1,437	+37.6
			Domestic	1,037	1,401	+35.1
			Canada	7	14	+97.7
			Overseas	-	22	N/A
Source: U.S. Department of Commerce.			Source: Texas Valley Citrus Committee.			

<sup>1</sup>Reported as 7/10 Bu. Cartons, converted by equivalent weight to standard Florida 4/5 Bu. Carton.



## Florida FCGJ Availability, Movement and Inventory

Item	Prior Season Comparison (October - September)			Season-to-Date 01/28/23 (FDOC Processor Week 17)		
	2020-21	2021-22	Change	2021-22	2022-23	Change
	- million PS -		- % -	- million PS -		- % -
<b>Beginning Inventory</b>	<b>7.3</b>	<b>5.7</b>	<b>-22.5</b>	<b>5.7</b>	<b>3.6</b>	<b>-36.0</b>
<b>Pack from Fruit</b>	<b>1.3</b>	<b>0.9</b>	<b>-31.6</b>	<b>0.3</b>	<b>0.0</b>	<b>-100.0</b>
<b>Imports<sup>a</sup></b>	<b>0.9</b>	<b>0.7</b>	<b>-20.1</b>	<b>0.2</b>	<b>0.3</b>	<b>+65.2</b>
<b>Availability</b>	<b>9.5</b>	<b>7.3</b>	<b>-23.5</b>	<b>6.2</b>	<b>3.9</b>	<b>-36.6</b>
<b>Movement</b>	<b>3.8</b>	<b>3.7</b>	<b>-4.9</b>	<b>1.6</b>	<b>0.7</b>	<b>-55.7</b>
Bulk	3.7	3.6	-4.0	1.6	0.7	-58.1
Packaged	0.1	0.1	-35.7	0.0	0.0	+273.1
<b>Ending Inventory</b>	<b>5.7</b>	<b>3.6</b>	<b>-36.0</b>	<b>4.6</b>	<b>3.2</b>	<b>-30.0</b>
Bulk	5.7	3.6	-36.0	4.6	3.2	-30.0
Packaged	0.0	0.0	-39.2	0.0	0.0	-48.4
	- - weeks supply - -		- % -	- - weeks supply - -		- % -
<b>Carry Over<sup>b</sup></b>	<b>77.1</b>	<b>52.8</b>	<b>-31.4</b>	<b>49.5</b>	<b>78.2</b>	<b>+57.9</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: 01/28/23 (FDOC Processor Week 17)		
	2020-21	2021-22	Change	2021-22	2022-23	Change
	- million PS -		- % -	- million PS -		- % -
<b>Beginning Inventory</b>	<b>9.5</b>	<b>8.8</b>	<b>-7.1</b>	<b>8.8</b>	<b>7.3</b>	<b>-17.2</b>
<b>Pack from Fruit</b>	<b>8.1</b>	<b>6.2</b>	<b>-23.4</b>	<b>2.7</b>	<b>1.6</b>	<b>-40.4</b>
<b>Imports<sup>a</sup></b>	<b>1.7</b>	<b>3.2</b>	<b>+91.1</b>	<b>1.4</b>	<b>2.0</b>	<b>+46.8</b>
<b>Availability</b>	<b>19.3</b>	<b>18.2</b>	<b>-5.4</b>	<b>12.9</b>	<b>10.9</b>	<b>-15.3</b>
<b>Movement</b>	<b>10.4</b>	<b>11.0</b>	<b>+5.7</b>	<b>3.9</b>	<b>3.5</b>	<b>-10.0</b>
Bulk	-0.3	-0.3	+4.0	0.1	0.3	+308.9
Packaged	10.8	11.4	+5.6	3.8	3.2	-15.2
<b>Ending Inventory</b>	<b>8.8</b>	<b>7.3</b>	<b>-17.2</b>	<b>9.2</b>	<b>7.4</b>	<b>-18.7</b>
Bulk	8.7	7.1	-18.4	8.8	7.2	-17.8
Packaged	0.1	0.2	+58.0	0.4	0.2	-39.8
	- - weeks supply - -		- % -	- - weeks supply - -		- % -
<b>Carry Over<sup>b</sup></b>	<b>44.0</b>	<b>34.5</b>	<b>-21.6</b>	<b>40.1</b>	<b>36.2</b>	<b>-9.7</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 - December						
Country	Volume			FOB Value/SSG <sup>c</sup>		
	2021-22	2022-23	Change	2021-22	2022-23	Change
	- million SSE gallons -		- % -	- \$/SSE gallon -		- % -
Canada	0.39	0.52	+34.6	4.51	3.46	-23.3
Europe	0.28	0.12	-55.7	5.82	5.34	-8.2
Japan	0.09	0.12	+37.0	4.64	3.29	-29.0
Other	0.59	0.18	-69.7	5.16	5.40	+4.6
<b>TOTAL</b>	<b>1.35</b>	<b>0.95</b>	<b>-29.7</b>	<b>5.08</b>	<b>4.05</b>	<b>-20.3</b>

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

<sup>b</sup> FDOC Processor exports of GJ for the 2022-23 season were down 98.8%, season-to-date through 01/28/23.

<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		
	2020-21	2021-22	Change	2020-21	2021-22	Change	2020-21	2021-22	Change
	- million SSE gallons -		- % -	- million dollars -		- % -	- \$/SSE gallon -		- % -

### Full Season Results for the Previous Two Seasons

Refrigerated	8.65	8.41	-2.7	83.75	86.28	+3.0	9.69	10.25	+5.9
NFC	8.47	8.21	-3.0	80.35	82.23	+2.3	9.49	10.01	+5.5
RECON	0.18	0.20	+14.2	3.39	4.05	+19.3	19.12	19.97	+4.4
FCGJ	0.42	0.46	+8.4	1.93	2.64	+36.5	4.60	5.79	+25.9
Shelf Stable	2.97	2.54	-14.4	22.97	22.15	-3.6	7.73	8.71	+12.6
<b>TOTAL</b>	<b>12.04</b>	<b>11.41</b>	<b>-5.2</b>	<b>108.66</b>	<b>111.07</b>	<b>+2.2</b>	<b>9.03</b>	<b>9.73</b>	<b>+7.8</b>

### Season-to-Date through 01/28/23, Topline Report #4

	2021-22	2022-23	Change	2021-22	2022-23	Change	2021-22	2022-23	Change
Refrigerated	2.59	2.51	-3.2	25.37	26.53	+4.6	9.78	10.57	+8.1
NFC	2.53	2.45	-3.0	24.16	25.34	+4.9	9.55	10.32	+8.1
RECON	0.06	0.06	-12.2	1.20	1.19	-0.8	18.91	21.37	+13.0
FCOJ	0.13	0.12	-12.0	0.74	0.90	+22.3	5.64	7.84	+38.9
Shelf Stable	0.86	0.74	-13.5	7.16	6.75	-5.6	8.31	9.08	+9.2
<b>TOTAL</b>	<b>3.59</b>	<b>3.37</b>	<b>-6.0</b>	<b>33.26</b>	<b>34.19</b>	<b>+2.8</b>	<b>9.28</b>	<b>10.15</b>	<b>+9.4</b>

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 01/29/23

Destination/Variety	2021-22 STD	2022-23 STD	Change
- 1,000 4/5-bu. cartons -			- % -
<b>Domestic &amp; Canadian - All</b>	<b>1,689</b>	<b>1,275</b>	<b>-24.5</b>
White	47	28	-39.0
Red/Pink	1,643	1,247	-24.1
<b>Offshore Exports - All</b>	<b>516</b>	<b>200</b>	<b>-61.2</b>
White	67	30	-54.5
Red/Pink	449	170	-62.2
<b>TOTAL - All</b>	<b>2,206</b>	<b>1,476</b>	<b>-33.1</b>
White	113	59	-48.1
Red/Pink	2,092	1,417	-32.3

Source: DFVI, Florida Dept. of Agriculture



## Florida Fresh Grapefruit Shipments Season-to-Date through 01/29/23

Country	2021-22 STD	2022-23 STD	Change
- 1,000 4/5-bu. cartons -			- % -
United States	1,585	1,205	-24.0
Canada	104	70	-32.4
Europe	304	138	-54.6
Japan	122	46	-62.5
Other	90	17	-81.6
<b>TOTAL - All</b>	<b>2,206</b>	<b>1,476</b>	<b>-33.1</b>

Source: DFVI, Florida Dept. of Agriculture





**Florida Fresh Grapefruit Domestic FOB Prices**  
**Season-to-Date through 01/29/23**

Variety	FOB Price		
	2021-22	2022-23	Change
	Final	STD	
	- \$ / carton -		- % -
<b>TOTAL<sup>a</sup></b>	<b>19.71</b>	<b>21.06</b>	<b>+6.8</b>
<b>White</b>	<b>20.65</b>	<b>22.22</b>	<b>+7.6</b>
<b>Red/Pink</b>	<b>19.66</b>	<b>21.01</b>	<b>+6.9</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>			
2018	0.8472	3.6398	110.3812
2019	0.8932	3.9440	109.0191
2020	0.8692	5.1704	106.7155
2021	0.8455	5.3959	109.7795
2022	0.9528	5.1574	131.6441
2022 (through January)	0.8824	5.3684	115.0551
2023 (through January)	0.9101	5.2491	123.5248
% Change	+3.1	-2.2	+7.4
<b>Average for Month of January</b>			
2022	0.8830	5.5313	114.842
2023	0.9384	5.2928	131.782
% Change	+6.3	-4.3	+14.8

