



# Florida Citrus Economic & Market Indicators

November, 2005

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## Summary Comments

- Over the July through September period of 2005, ABECitrus FCOJ exports were down 2.8% from the previous season, with exports to NAFTA countries and Europe up 53.5% and down 19.7%, respectively.
- Season-to-date through 10/29/05, Florida OJ movement was down 14.6% from last season; pack from fruit was up 14.0%; imports and miscellaneous supplies were up 42.3%; and inventories were down 24.4%.
- In 2004-05, U.S. OJ imports were up 60.8%, while U.S. OJ exports were down 3.2%. In 2005-06, season-to-date through 10/29/05, Florida OJ exports were down 48.8% (FCPA).
- For the 2004-05 season, 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 1.2% from the previous season, with the NFC price up 3.7%, the Recon price down .5%, the FCOJ price down .9%, and the overall OJ price up 1.6%.
- The October average FCOJ Futures price was \$1.08/PS, up \$.26/PS from last year. The Florida bulk FCOJ FOB price was \$1.17/PS for the week ending 10/29/05, up \$.25/PS from last year; while the Rotterdam price was at an estimated \$1,413/MT, up \$488/MT from last year.
- Season-to-date through 11/13/05, fresh orange and specialty citrus shipments were down 28.5% from last season, with (CAC) FOB prices for early & midseason and navel oranges up 6.5% and down 22.8%, respectively.
- For August through September, 2005, Clementine/tangerine imports were up 65.1%. Season-to-date through 11/13/05, Texas fresh grapefruit shipments were up 76.6%.
- Season-to-date through 10/29/05, Florida GJ availability, movement and the ending inventory level were down 48.4%, 59.6% and 47.0%, respectively.
- For the 2004-05 season, U.S. GJ exports were down 43.6%. In 2005-06, season-to-date through 10/29/05, Florida GJ exports were down 63.4% (FCPA).
- For the 2004-05 season, GJ 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 26.6% from last season, with the NFC, Recon and overall prices up 24.6%, 20.3% and 19.3%, respectively.
- Season-to-date through 11/13/05, Florida fresh grapefruit shipments were down 52.4% from last season, with domestic/Canadian shipments down 25.4% and offshore shipments down 77.1% (CAC). Season-to-date through 10/30/05, certified shipments to Europe and Japan were down 66.6% and 83.3%, respectively.
- For the week ending 11/14/05 versus a year ago, the Euro-per-Dollar and Yen-per-Dollar exchange rates were up 10.1% and 11.2%, respectively.
- Advertising recall continues to trend upward, along with increased awareness of the tag-line, "Healthy. Pure & Simple." Furthermore, Intent to Purchase is also significantly higher than the same time last year. The advertising seems to be swaying Intent to Purchase as recallers are motivated significantly more than non-recallers. Also, the main advertising theme is coming through as can be seen with the comparison of recallers and non-recallers with respect to the perception "OJ is Good for your Health."

## Brazil Orange-Juice Exports

Country	Season (July-June)			Season-to-Date (July-September)		
	2003-04	2004-05	Change	2004-05	2005-06	Change
	- million SSE gallons -		- % -	- million SSE gallons -		- % -
<b>Europe</b>	<b>1,370.6</b>	<b>1,384.1</b>	<b>+1.0</b>	<b>406.9</b>	<b>326.6</b>	<b>-19.7</b>
<b>NAFTA</b>	<b>234.4</b>	<b>300.8</b>	<b>+28.3</b>	<b>44.1</b>	<b>67.7</b>	<b>+53.5</b>
<b>Asia</b>	<b>209.7</b>	<b>210.3</b>	<b>+.3</b>	<b>28.3</b>	<b>55.1</b>	<b>+94.6</b>
<b>Mercosul</b>	<b>3.9</b>	<b>2.7</b>	<b>-30.1</b>	<b>.8</b>	<b>.4</b>	<b>-51.1</b>
<b>Others</b>	<b>90.7</b>	<b>97.4</b>	<b>+7.4</b>	<b>26.1</b>	<b>42.3</b>	<b>+62.2</b>
<b>TOTAL</b>	<b>1,909.3</b>	<b>1,995.4</b>	<b>+4.5</b>	<b>506.2</b>	<b>492.1</b>	<b>-2.8</b>

SOURCE: ABECitrus.

# Florida Orange-Juice Availability, Movement and Inventory

Item	Season (October-September)			Season-to-Date 10/29/05 (FCPA Week 4)		
	2003-04 <sup>a</sup>	2004-05 <sup>e</sup>	Change	2004-05	2005-06	Change
	- million SSE gallons -		- % -	- million SSE gallons -		- % -
<b>Beginning Inventory<sup>c</sup></b>	<b>680.5</b>	<b>794.8</b>	<b>+16.8</b>	<b>794.8</b>	<b>602.8</b>	<b>-24.2</b>
<b>Pack from Fruit<sup>d</sup></b>	<b>1,451.1</b>	<b>913.9</b>	<b>-37.0</b>	<b>.8</b>	<b>.9</b>	<b>+14.0</b>
<b>Imports<sup>d,e</sup></b>	<b>96.4</b>	<b>164.1</b>	<b>+67.4</b>	<b>12.4</b>	<b>17.6</b>	<b>+42.3</b>
<b>Availability</b>	<b>2,228.0</b>	<b>1,872.7</b>	<b>-15.9</b>	<b>808.0</b>	<b>621.4</b>	<b>-23.1</b>
<b>Movement</b>	<b>1,437.3</b>	<b>1,269.9</b>	<b>-11.6</b>	<b>109.5</b>	<b>93.5</b>	<b>-14.6</b>
FCOJ <sup>f</sup>	861.0	681.6	-20.8	63.1	52.0	-17.7
NFC <sup>g</sup>	576.3	588.4	+2.1	46.4	41.6	-10.4
<b>Ending Inventory</b>	<b>790.7</b>	<b>602.8</b>	<b>-23.8</b>	<b>698.4</b>	<b>527.8</b>	<b>-24.4</b>
	- - weeks supply - -		- % -	- - weeks supply - -		- % -
<b>Carryover – STD<sup>h</sup></b>	<b>29.1</b>	<b>24.7</b>	<b>-15.3</b>	<b>25.5</b>	<b>22.6</b>	<b>-11.5</b>
<b>Carryover – 13 Weeks<sup>i</sup></b>				<b>25.4</b>	<b>21.0</b>	<b>-17.5</b>
<b>Carryover – 3 Years<sup>j</sup></b>				<b>27.1</b>	<b>20.5</b>	<b>-24.4</b>

<sup>a</sup>53 weeks.

<sup>b</sup>52 weeks.

<sup>c</sup>2004-05 beginning inventory adjusted (bulk chilled OJ put on an 11.8° Brix gallon basis).

<sup>d</sup>FCPA non-member Florida product included in pack from fruit for season data but included in imports for season-to-date data.

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

<sup>f</sup>Excludes COJ used in FCOJ.

<sup>g</sup>Excludes movement of reconstituted chilled orange juice.

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

<sup>i</sup>Season-to-date weeks supply based on last 13-week movement.

<sup>j</sup>Season-to-date weeks supply based on last 3-year movement.

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

Country	(October-September)		
	2003-04	2004-05	Change
	- - - million SSE gallons - - -		- % -
<b>Brazil</b>	<b>154.63</b>	<b>231.91</b>	<b>+50.0</b>
<b>CBI</b>	<b>55.23</b>	<b>63.68</b>	<b>+15.30</b>
<b>Mexico</b>	<b>8.22</b>	<b>54.98</b>	<b>+568.9</b>
<b>Other</b>	<b>4.27</b>	<b>6.93</b>	<b>+62.3</b>
<b>TOTAL</b>	<b>222.34</b>	<b>357.49</b>	<b>+60.8</b>

<sup>a</sup>Includes OJ with added vitamins and minerals.  
 SOURCE: U.S. Department of Commerce.

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

Country	(October-September)		
	2003-04	2004-05	Change
	- - - million SSE gallons - - -		- % -
<b>Canada</b>	<b>56.64</b>	<b>63.81</b>	<b>+12.7</b>
<b>Europe</b>	<b>39.51</b>	<b>30.03</b>	<b>-24.0</b>
<b>Japan</b>	<b>6.65</b>	<b>4.25</b>	<b>-36.1</b>
<b>Other</b>	<b>20.18</b>	<b>20.99</b>	<b>+4.0</b>
<b>TOTAL</b>	<b>122.98</b>	<b>119.08</b>	<b>-3.2<sup>b</sup></b>

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

<sup>b</sup>FCPA exports of OJ for the 2005-06 season were down 48.8%, season-to-date through 10/29/05.

SOURCE: U.S. Department of Commerce.

## U.S. Retail Orange-Juice Sales

Item	Volume			Price		
	Season		Change	Season		Change
	2003-04	2004-05		2003-04	2004-05	
	- million SSE gallons -		- % -	- million SSE gallons -		- % -
<b>Refrigerated</b>	<b>716.7</b>	<b>716.6</b>	<b>.0</b>	<b>4.45</b>	<b>4.52</b>	<b>+1.5</b>
NFC	387.1	373.8	-3.4	5.06	5.25	+3.7
RECON	329.6	342.8	+4.0	3.74	3.72	-.5
<b>FCOJ</b>	<b>78.6</b>	<b>69.9</b>	<b>-11.0</b>	<b>3.31</b>	<b>3.28</b>	<b>-.9</b>
<b>Shelf Stable</b>	<b>7.4</b>	<b>6.6</b>	<b>-10.8</b>	<b>5.28</b>	<b>5.47</b>	<b>+3.6</b>
<b>TOTAL</b>	<b>802.7</b>	<b>793.1</b>	<b>-1.2</b>	<b>4.35</b>	<b>4.42</b>	<b>+1.6</b>

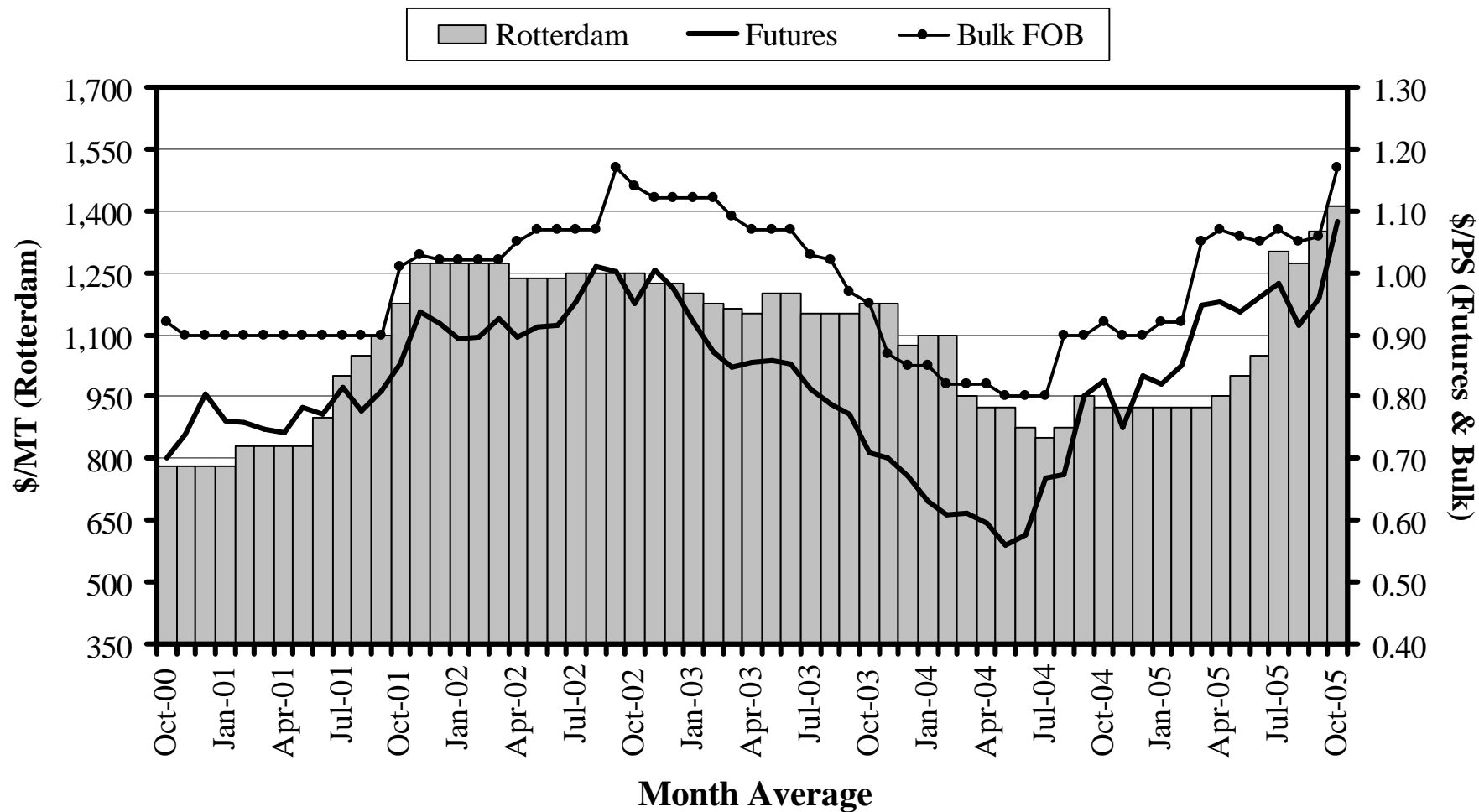
\*SEASON: Preliminary 52-weeks ending 10/02/04 for 2003-04.

†SEASON: Estimates for 2004-05.

‡SEASON-TO-DATE: Actual for 2003-04 and preliminary for 2004-05.

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 October 2000 Thru October 2005



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



## FCOJ and FCGJ Prices – October<sup>a</sup>

Item	2004-05	2005-06	Change
<b>FCOJ</b>	- - - - \$/pounds solids - - - -		- - % - -
<b>Futures</b>	<b>.82</b>	<b>1.08</b>	<b>+31.7</b>
<b>Florida Bulk FOB</b>	<b>.92</b>	<b>1.17</b>	<b>+27.2</b>
	- - - - \$/metric ton - - - -		
<b>Rotterdam</b>	<b>925</b>	<b>1,413</b>	<b>+52.8</b>
<b>FCGJ</b>	- - - - \$/pounds solids - - - -		- - % - -
<b>Florida Bulk FOB – Red</b>	<b>na</b>	<b>na</b>	<b>na</b>
<b>Florida Bulk FOB – White</b>	<b>na</b>	<b>na</b>	<b>na</b>

<sup>a</sup>Prices are for the following time periods: Futures – October average.

Florida Bulk FCOJ and FCGJ FOB – Week ending 10/29/05.

Rotterdam – October *Foodnews*.

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

**FCPA Delivered-In Prices**  
**(Report #41 (Final Report) – Week Ending 07/16/05)**

Variety	Final Season-to-Date		
	2003-04	2004-05	Change
	----- \$/PS -----		
Early & Midseason <sup>a</sup>	.649	.798	+149
Valencias <sup>a</sup>	.765	1.028	+263
White Grapefruit	.494	1.884	+1390
Red Grapefruit	.490	1.818	+1328

<sup>a</sup> Final priced, combined.

## Florida Fresh Orange and Specialty Fruit Shipments and FOB Prices, Season-to-Date Thru 11/13/05

Variety	Shipments			FOB Price		
	2004-05 STD	2005-06 STD	Change	2004-05 STD	2005-06 STD	Change
	- 1,000 4/5-bu. cartons -		- % -	----- \$ -----		- % -
<b>Early &amp; Midseason</b>	<b>608</b>	<b>274</b>	<b>-54.9</b>	<b>10.58</b>	<b>11.27</b>	<b>+6.5</b>
<b>Navel</b>	<b>624</b>	<b>570</b>	<b>-8.7</b>	<b>14.27</b>	<b>11.02</b>	<b>-22.8</b>
<b>Valencia</b>	<b>0</b>	<b>0</b>	<b>--</b>	<b>na</b>	<b>na</b>	<b>--</b>
<b>Tangelo</b>	<b>18</b>	<b>6</b>	<b>-66.7</b>	<b>na</b>	<b>na</b>	<b>--</b>
<b>Temple</b>	<b>0</b>	<b>0</b>	<b>--</b>	<b>na</b>	<b>na</b>	<b>--</b>
<b>Early Tangerines</b>	<b>1,287</b>	<b>964</b>	<b>-25.1</b>	<b>17.01</b>	<b>na</b>	<b>--</b>
<b>Honey</b>	<b>0</b>	<b>0</b>	<b>--</b>	<b>na</b>	<b>na</b>	<b>--</b>
<b>TOTAL</b>	<b>2,537</b>	<b>1,814</b>	<b>-28.5</b>			

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

SOURCE: Citrus Administrative Committee.

## Selected Competitive Fresh Fruit Shipments

U.S. Clementine and Tangerine Imports			Texas Fresh Grapefruit Shipments		
2004-05	2005-06	Change	2004-05	2005-06	Change
August-September			STD – 11/13/05		
- - - - million pounds - - - -		- % -	- - thousand 7/10-bu. cartons - -		- % -
12.68	20.94	+65.1	466	823	+76.6

SOURCE: U.S. Department of Commerce.

SOURCE: Citrus Administrative Committee.

# Florida Grapefruit-Juice Availability, Movement and Inventory

Item	Season (October-September)			Season-to-Date 10/29/05 (FCPA Week 4)		
	2003-04 <sup>a</sup>	2004-05 <sup>e</sup>	Change	2003-04	2004-05	Change
	- million SSE gallons -		- % -	- million SSE gallons -		- % -
<b>Beginning Inventory<sup>c</sup></b>	<b>74.3</b>	<b>65.0</b>	<b>-12.5</b>	<b>65.0</b>	<b>33.1</b>	<b>-49.0</b>
<b>Pack from Fruit<sup>d</sup></b>	<b>120.4</b>	<b>34.6</b>	<b>-71.3</b>	<b>.7</b>	<b>.8</b>	<b>+7.8</b>
<b>Availability</b>	<b>194.6</b>	<b>99.6</b>	<b>-48.8</b>	<b>65.8</b>	<b>33.9</b>	<b>-48.4</b>
<b>Movement</b>	<b>129.9</b>	<b>66.5</b>	<b>-48.8</b>	<b>7.4</b>	<b>3.0</b>	<b>-59.6</b>
FCGJ <sup>e</sup>	95.6	47.0	-50.8	5.6	1.6	-71.8
NFC <sup>f</sup>	34.4	19.5	-43.3	1.8	1.4	-21.5
<b>Ending Inventory</b>	<b>64.7</b>	<b>33.1</b>	<b>-48.8</b>	<b>58.3</b>	<b>30.9</b>	<b>-47.0</b>
	- - weeks supply - -		- % -	- - weeks supply - -		- % -
<b>Carryover – STD<sup>g</sup></b>	<b>26.4</b>	<b>25.9</b>	<b>-2.0</b>	<b>31.5</b>	<b>41.3</b>	<b>+31.2</b>
<b>Carryover – 13 Weeks<sup>h</sup></b>				<b>23.4</b>	<b>21.4</b>	<b>-8.7</b>
<b>Carryover – 3 Years<sup>i</sup></b>				<b>28.2</b>	<b>14.9</b>	<b>-47.0</b>

<sup>a</sup>53 weeks.

<sup>b</sup>52 weeks.

<sup>c</sup> 2004-05 beginning inventory adjusted (bulk chilled GJ put on a 10.0° Brix gallon basis).

<sup>d</sup>Includes 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.

<sup>e</sup>Excludes CGJ used in FCGJ.

<sup>f</sup>Excludes movement of reconstituted chilled grapefruit juice.

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

<sup>h</sup>Season-to-date weeks supply based on last 13-week movement.

<sup>i</sup>Season-to-date weeks supply based on last 3-year movement.

## U.S. Grapefruit-Juice Exports

Country	(October-September)		
	2003-04	2004-05	Change
	- million SSE gallons -		- % -
<b>Canada</b>	<b>3.38</b>	<b>3.16</b>	<b>-6.5</b>
<b>Europe</b>	<b>21.45</b>	<b>8.55</b>	<b>-60.1</b>
<b>Japan</b>	<b>15.93</b>	<b>10.00</b>	<b>-37.2</b>
<b>Other</b>	<b>1.54</b>	<b>2.18</b>	<b>+41.6</b>
<b>TOTAL</b>	<b>42.31</b>	<b>23.88</b>	<b>-43.6<sup>b</sup></b>

<sup>a</sup>FDOC estimates.

<sup>b</sup>FCPA exports of GJ for the 2005-06 season were down 63.4%, season-to-date through 10/29/05.

SOURCE: U.S. Department of Commerce.

## U.S. Retail Grapefruit-Juice Sales

Item	Volume			Price		
	Season		Change	Season		Change
	2003-04	2004-05		2003-04	2004-05	
	- million SSE gallons -		- % -	- million SSE gallons -		- % -
<b>NFC</b>	<b>17.0</b>	<b>11.0</b>	<b>-35.7</b>	<b>5.13</b>	<b>6.39</b>	<b>+24.6</b>
<b>RECON</b>	<b>15.4</b>	<b>12.2</b>	<b>-20.5</b>	<b>4.49</b>	<b>5.40</b>	<b>+20.3</b>
<b>FCGJ</b>	<b>1.6</b>	<b>1.8</b>	<b>+11.5</b>	<b>3.40</b>	<b>3.18</b>	<b>-6.6</b>
<b>TOTAL</b>	<b>34.0</b>	<b>24.9</b>	<b>-26.6</b>	<b>4.76</b>	<b>5.68</b>	<b>+19.3</b>

\*SEASON: Preliminary 52-weeks ending 10/02/04 for 2003-04.

\*SEASON: Estimates for 2004-05.

\*SEASON-TO-DATE: Actual for 2003-04 and preliminary for 2004-05.

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 Thru 11/13/05

Shipments/ Variety	2004-05	2005-06	Change
	----- 1,000 4/5-bu. cartons -----		-- % --
<b>Domestic &amp; Canadian – All</b>	<b>814</b>	<b>607</b>	<b>-25.4</b>
<b>White</b>	<b>41</b>	<b>75</b>	<b>+82.9</b>
<b>Colored</b>	<b>773</b>	<b>532</b>	<b>-31.2</b>
<b>Offshore Exports – All</b>	<b>888</b>	<b>203</b>	<b>-77.1</b>
<b>White</b>	<b>347</b>	<b>110</b>	<b>-68.3</b>
<b>Colored</b>	<b>541</b>	<b>93</b>	<b>-82.8</b>
<b>TOTAL - All</b>	<b>1,702</b>	<b>810</b>	<b>-52.4</b>
<b>White</b>	<b>388</b>	<b>185</b>	<b>-52.3</b>
<b>Colored</b>	<b>1,314</b>	<b>625</b>	<b>-52.4</b>

SOURCE: Citrus Administrative Committee, preliminary.



## Florida Fresh Grapefruit Domestic and Export Shipments

Country	Season-to-Date (August 1 – October 30)		
	2004-05	2005-06	Change
	- thousand cartons -		- % -
<b>United States</b>	<b>391</b>	<b>297</b>	<b>-24.1</b>
<b>Canada</b>	<b>71</b>	<b>45</b>	<b>-35.8</b>
<b>Europe</b>	<b>124</b>	<b>42</b>	<b>-66.6</b>
<b>Japan</b>	<b>191</b>	<b>32</b>	<b>-83.3</b>
<b>Other</b>	<b>1</b>	<b>3</b>	<b>+200.0</b>
<b>TOTAL</b>	<b>778</b>	<b>419</b>	<b>-46.1</b>

SOURCE: Florida Department of Citrus.

## Florida Fresh Grapefruit Domestic FOB Prices Season-to-Date Thru 11/13/05

Variety	FOB Price		
	2004-05 STD	2005-06 STD	Change
	----- \$ -----		-- % --
<b>GULF COAST</b>			
White	15.86	na	na
Colored	16.10	na	na
<b>INDIAN RIVER</b>			
White	na	na	na
Colored	15.95	na	na
<b>SUNRIDGE</b>			
White	na	na	na
Colored	14.99	na	na

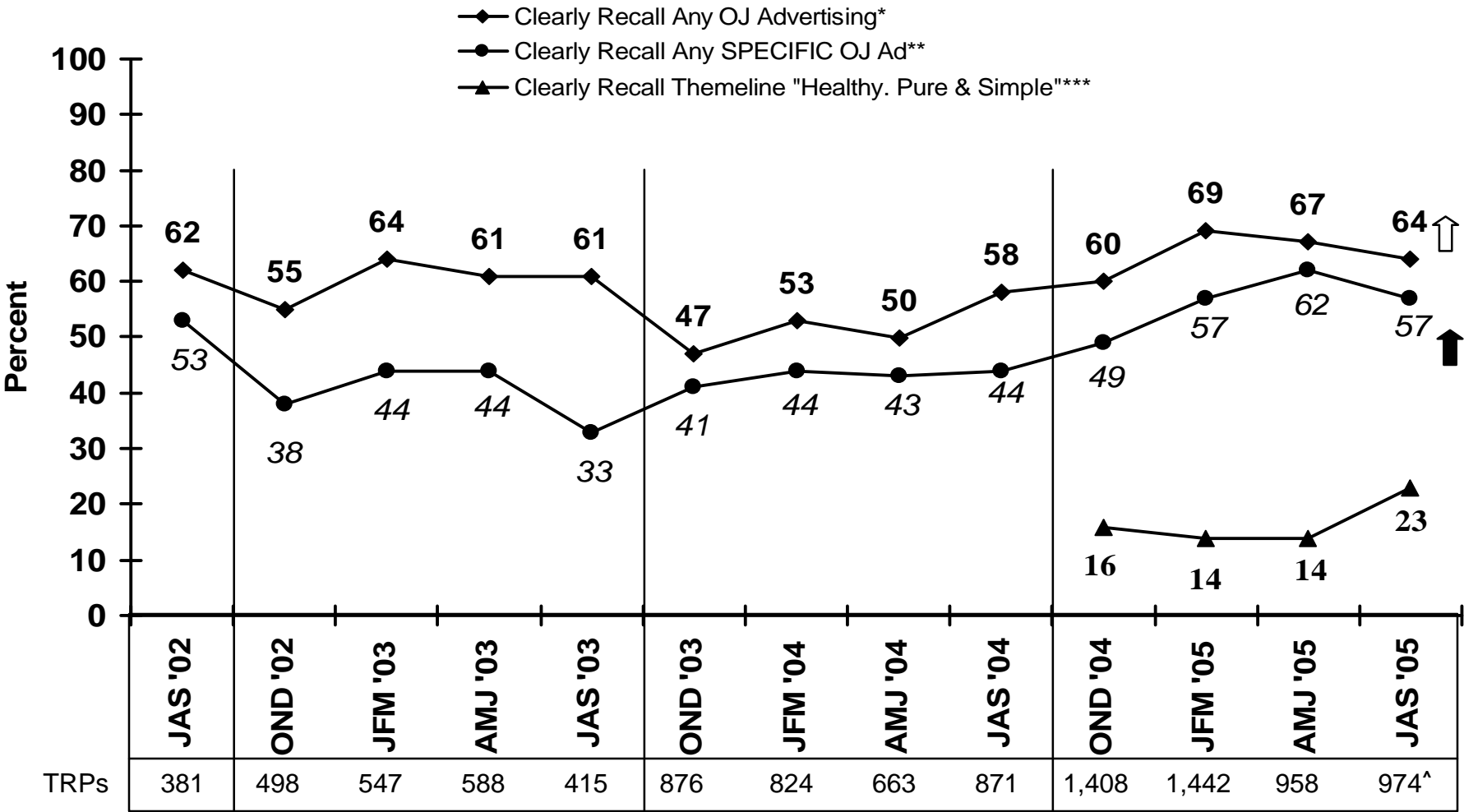
SOURCE: Citrus Administrative Committee.

## Foreign Exchange Rates Per \$US

Date	Euro	Real	Yen
<b>ANNUAL</b>			
<b>2001</b>	<b>1.11700</b>	<b>2.37881</b>	<b>121.55551</b>
<b>2002</b>	<b>1.06106</b>	<b>2.96705</b>	<b>125.21937</b>
<b>2003</b>	<b>0.88540</b>	<b>3.11678</b>	<b>115.97995</b>
<b>2004</b>	<b>0.80510</b>	<b>2.92629</b>	<b>108.17451</b>
<b>2004</b> (Thru 11/14/04)	<b>0.81289</b>	<b>2.95420</b>	<b>108.83119</b>
<b>2005</b> (Thru 11/14/05)	<b>0.79835</b>	<b>2.46071</b>	<b>108.84969</b>
<b>% Change</b>	<b>-1.8</b>	<b>-16.7</b>	<b>+.02</b>
<b>WEEK ENDING 11/14/05</b>			
<b>2004</b>	<b>0.77323</b>	<b>2.81600</b>	<b>105.96143</b>
<b>2005</b>	<b>0.85141</b>	<b>2.17470</b>	<b>117.81000</b>
<b>% Change</b>	<b>+10.1</b>	<b>-22.8</b>	<b>+11.2</b>

RANDOM

# Percentage Recalling Any FDOC OJ Advertising\*



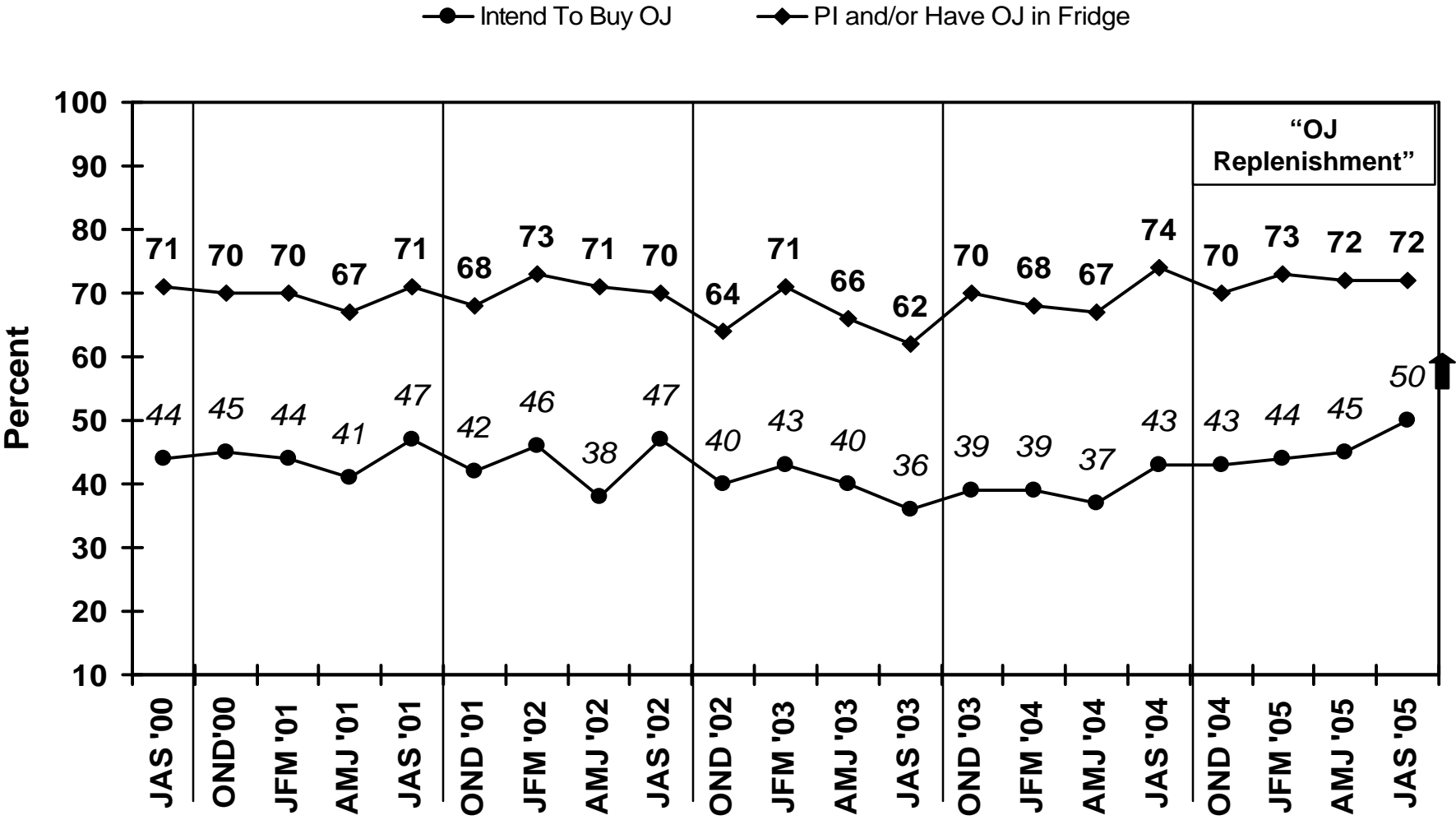
\*Recall of FDOC Themelines for OJ is included. \*\*Recall of Specific OJ Ads (excluding themelines) provided since inception of Moms campaign in JFM '02. "Best Start Under the Sun" was the themeline from JFM '02 through February '04. "Drink Florida Orange Juice Everyday" was the themeline for March-Oct '04; this themeline was not tracked. \*\*\*New themeline "Healthy. Pure & Simple" added November 2004; shown but not spoken in 15 second ads for "Health Drink," "Island," and "Squeezer." Spoken in both 15 and 30 seconds ads for "Laboratory." TRPs are for target of Adults 35+ as of May 2004. ^Estimated TRPs.

↑ = Significantly higher than year ago at 90%+ confidence level.

↑ = Directionally higher than year ago at 80% confidence level.

SOURCE: Data Development Worldwide

# Intending to Purchase Orange Juice on Next Shopping Trip

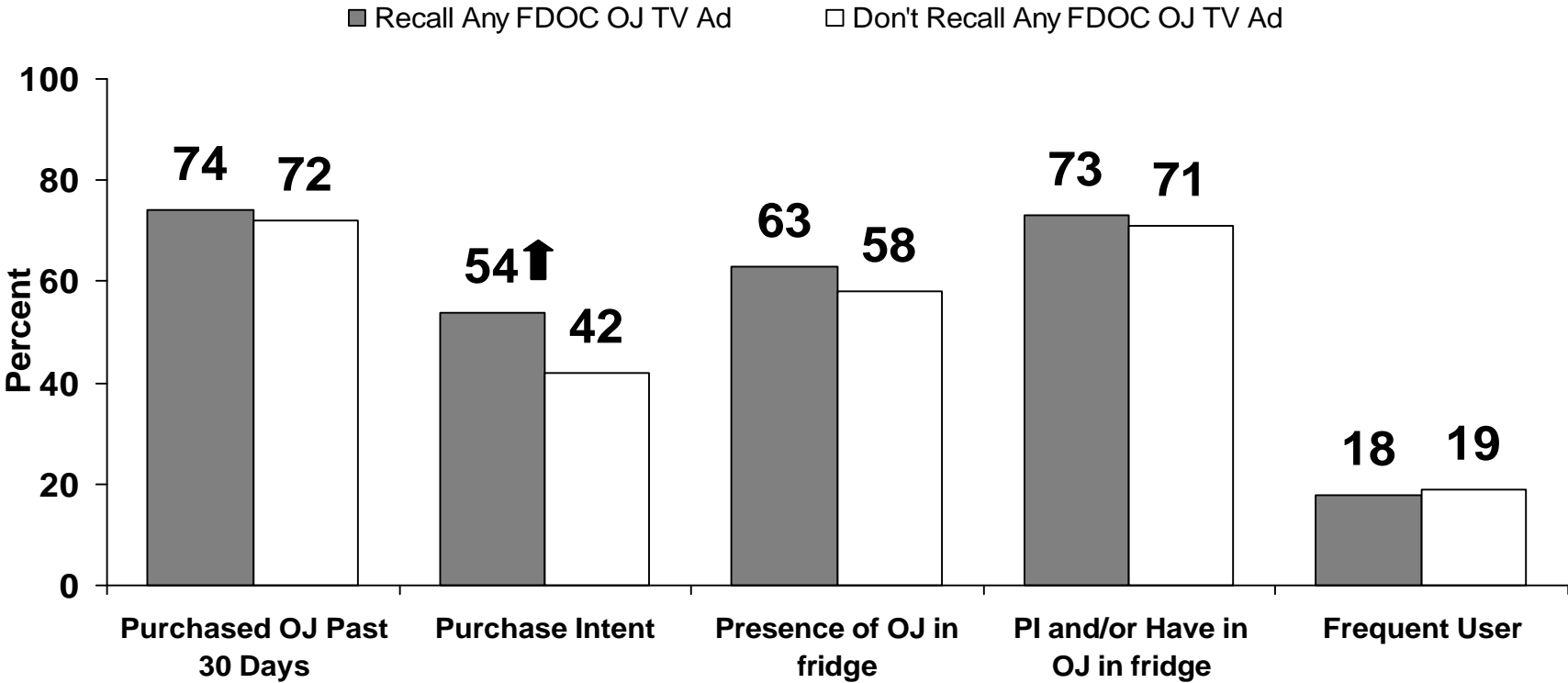


↑ = Significantly higher than year ago at 90%+ confidence level.

SOURCE: Data Development Worldwide

# Orange Juice Purchasing Differences

## FDOC OJ Ad Recallers vs. Non-Recallers - JAS '05



“OJ Replenishment”

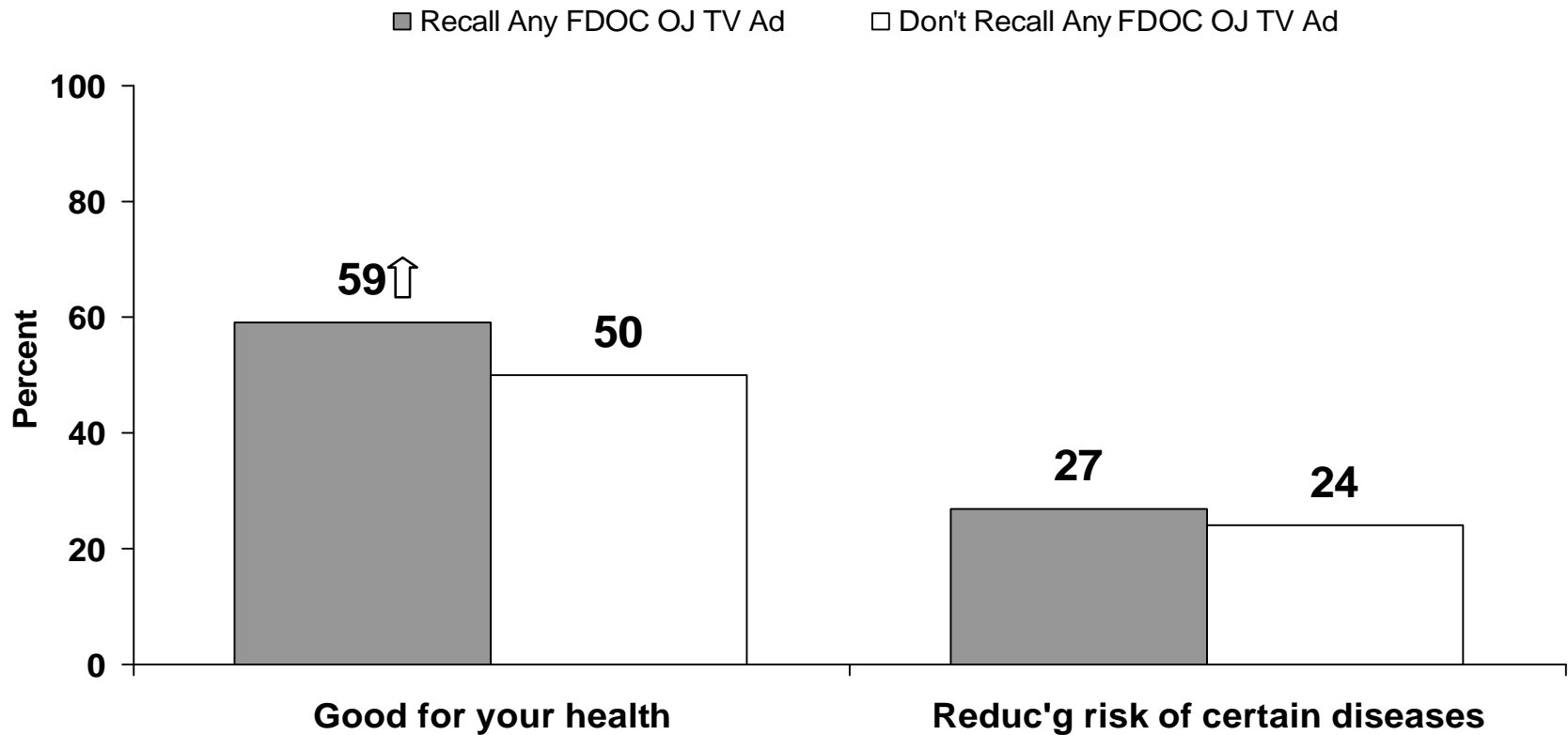
Point Difference Between  
Recallers and Non-Recallers

JAS-04	+5	+3	-7	-1	+3
JAS-05	+2	+12	+5	+2	-1

↑ = Significantly higher than Non-Recallers at 90%+ confidence level.

SOURCE: Data Development Worldwide

**“Being Good For Your Health” &  
“Reducing the Risk of Certain Diseases”  
FDOC OJ Ad Recallers vs. Non-Recallers - JAS '05**



Point Difference Between  
Recallers and Non-Recallers

JAS-04	+8	+10
JAS-05	+9	+3

↑ = Directionally higher than Non-Recallers at 80% confidence level.

SOURCE: Data Development Worldwide