



Florida Citrus Economic & Market Indicators

April, 2005

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Summary Comments

- For the July through February period of the 2004-05 Brazilian season, ABECitrus FCOJ exports were up 8.6% from last year, with exports to Europe and NAFTA countries up 7.9% and 18.6%, respectively.
- Season-to-date through 04/02/05, Florida OJ movement was down 4.5% from last season; pack from fruit was down 36.6%; imports and miscellaneous supplies were up 93.7%; and inventories were down 13.6%.
- Season-to-date through February, U.S. OJ imports were up 25.7%, while U.S. OJ exports were down 9.4%. Season-to-date through 04/02/05, Florida OJ exports were down 12.3% (FCPA).
- Season-to-date through 03/19/05, 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 1.0% from the previous season, with the NFC price up 2.9%, the Recon price down 2.4%, the FCOJ price down 1.0%, and the overall OJ price up .3%.
- The March average FCOJ Futures price was \$.95/PS, up \$.34 from last year. The Florida bulk FCOJ FOB price was \$1.07/PS for the week ending 03/19/05, up \$.25 from last year; while the Rotterdam price was at an estimated \$925/MT, down \$25/MT from last year. Season-to-date through 04/02/05, the delivered-in price for Valencia oranges was \$1.00/PS, up \$.26/PS from last season. The season-to-date delivered-in prices for white and red grapefruit were \$1.898/PS and \$1.925/PS, up \$1.424/PS and \$1.471/PS, respectively.
- Season-to-date through 04/10/05, fresh orange and specialty citrus shipments were down 22.3% from last season's level, with (CAC) FOB prices up 1.1% to 31.8%, depending on variety.
- Season-to-date through February, Clementine/tangerine imports were down 7.2%. Season-to-date through 04/02/05, Texas fresh grapefruit shipments were down 26.0%.
- Season-to-date through 04/02/05, Florida GJ availability, movement and the ending inventory level were down 39.4%, 36.4% and 41.2%, respectively.
- Season-to-date through February, U.S. GJ exports were down 22.4%. Season-to-date through 04/02/05, Florida GJ exports were down 47.8% (FCPA).
- Season-to-date through 03/19/05, 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 24.4% from last season, with the NFC, Recon and overall prices up 15.7%, 12.0% and 12.0%, respectively.
- Season-to-date through 04/10/05, Florida fresh grapefruit shipments were down 55.6% from last season, with domestic/Canadian shipments down 46.3% and offshore shipments down 60.1% (CAC). Season-to-date through 04/03/05, certified shipments to Europe and Japan were down 57.9% and 60.2%, respectively. Season-to-date through 04/10/05, domestic FOB prices for fresh grapefruit were up 78.9% to 88.8%, depending on variety and region.
- The Euro and Yen continue to be relatively strong.
- The Consumer Tracking Study for period Jan/Feb/Mar 2005 shows that recent recall is at historically high levels and purchase intent and replenishment continue to track positively. In general, imagery trends are negative, or lower than year ago levels, however recallers have significantly more favorable imagery scores than non-recallers. This suggests that overall consumers are not giving OJ very positive scores vs historical patterns, but the advertising does have a positive impact on consumers perspectives of key imagery.

Brazil Orange-Juice Exports

| Country | Season (July-June) | | | Season-to-Date (July-February) | | |
|-----------------|-------------------------|----------------------|---------------------|-----------------------------------|----------------|--------------|
| | 2003-04 | 2004-05 ^a | Change ^a | 2003-04 | 2004-05 | Change |
| | - million SSE gallons - | | - % - | - million SSE gallons - | | - % - |
| Europe | 1,370.6 | 1,232.9 | -10.0 | 880.8 | 950.3 | +7.9 |
| NAFTA | 234.4 | 355.1 | +51.5 | 173.3 | 205.5 | +18.6 |
| Asia | 209.7 | 212.1 | +1.1 | 126.2 | 124.3 | -1.5 |
| Mercosul | 3.9 | 3.9 | -1.4 | 2.6 | 1.9 | -26.5 |
| Others | 90.7 | 79.3 | -12.6 | 55.0 | 62.5 | +13.7 |
| TOTAL | 1,909.3 | 1,883.2 | -1.4 | 1,237.8 | 1,344.4 | +8.6 |

^aFDOC estimates.
SOURCE: ABECitrus.

Florida Orange-Juice Availability, Movement and Inventory

| Item | Season (October-September) | | | Season-to-Date 04/02/05 (FCPA Week 26) | | |
|--|-------------------------------|-----------------------------------|--------------|---|----------------|--------------|
| | 2003-04 ^a | 2004-05 ^e ^b | Change | 2003-04 | 2004-05 | Change |
| | - million SSE gallons - | | - % - | - million SSE gallons - | | - % - |
| Beginning Inventory^c | 680.5 | 794.8 | +16.8 | 680.5 | 794.8 | +16.8 |
| Pack from Fruit^d | 1,452.4 | 910.6 | -37.3 | 870.5 | 551.6 | -36.6 |
| Imports^e | 96.4 | 147.2 | +52.7 | 56.0 | 108.6 | +93.7 |
| Availability | 2,229.3 | 1,852.7 | -16.9 | 1,607.0 | 1,454.9 | -9.5 |
| Movement | 1,438.6 | 1,343.6 | -6.6 | 725.7 | 693.3 | -4.5 |
| FCOJ ^f | 862.3 | 748.3 | -13.2 | 435.1 | 382.0 | -12.2 |
| NFC ^g | 576.3 | 595.3 | +3.3 | 290.6 | 311.3 | +7.1 |
| Ending Inventory | 790.7 | 509.0 | -35.6 | 881.3 | 761.6 | -13.6 |
| | - - weeks supply - - | | - % - | - - weeks supply - - | | - % - |
| Carryover | 29.1 | 19.7 | -32.4 | 31.6 | 28.6 | -9.6 |

^a53 weeks.

^b52 weeks.

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

^dFCPA members only except for season data which includes an estimate of other Florida production by non-members.

^eIncludes domestic receipts by members of non-Florida product, Florida product received by members from non-members, futures receipts minus deliveries, foreign imports, reprocessed tangerine juice, net loss or gain during reprocessing and adjustments.

^fExcludes COJ used in FCOJ.

^gExcludes movement of reconstituted chilled orange juice.

U.S. Orange-Juice Imports^a

| Country | Season (October-September) | | | Season-to-Date (October-February) | | |
|---------------|-------------------------------|-----------------------------------|---------------------|--------------------------------------|---------------|-----------------|
| | 2003-04 | 2004-05 ^e ^b | Change ^b | 2003-04 | 2004-05 | Change |
| | - million SSE gallons - | | - % - | - million SSE gallons - | | - % - |
| Brazil | 154.63 | 220.50 | +42.6 | 72.92 | 76.50 | +4.9 |
| CBI | 55.23 | 55.23 | 0.0 | 10.32 | 16.62 | +61.0 |
| Mexico | 8.22 | 25.00 | +204.1 | 1.09 | 12.30 | +1,028.4 |
| Other | 4.27 | 4.27 | 0.0 | 1.69 | 2.73 | +61.5 |
| TOTAL | 222.34 | 305.00 | +37.2 | 86.02 | 108.15 | +25.7 |

^aIncludes OJ with added vitamins and minerals.

^bFDOC estimates.

SOURCE: U.S. Department of Commerce.

U.S. Orange-Juice Exports^a

| Country | Season (October-September) | | | Season-to-Date (October-February) | | |
|---------------|-------------------------------|-----------------------------------|---------------------|--------------------------------------|--------------|-------------------------|
| | 2003-04 | 2004-05 ^e ^b | Change ^b | 2003-04 | 2004-05 | Change |
| | - million SSE gallons - | | - % - | - million SSE gallons - | | - % - |
| Canada | 57 | 48 | -15.8 | 23.75 | 27.03 | +13.8 |
| Europe | 40 | 35 | -12.5 | 23.32 | 13.61 | -41.6 |
| Japan | 7 | 5 | -28.6 | 1.62 | 1.97 | +21.6 |
| Other | 20 | 16 | -20.0 | 7.12 | 7.93 | +11.4 |
| TOTAL | 123 | 104 | -15.4 | 55.80 | 50.54 | -9.4^c |

^aIncludes OJ with added vitamins and minerals.

^bFDOC estimates.

^cFCPA exports of OJ for the 2004-05 season were down 12.3%, season-to-date thru 04/02/05.

SOURCE: U.S. Department of Commerce.

U.S. Retail Orange-Juice Sales

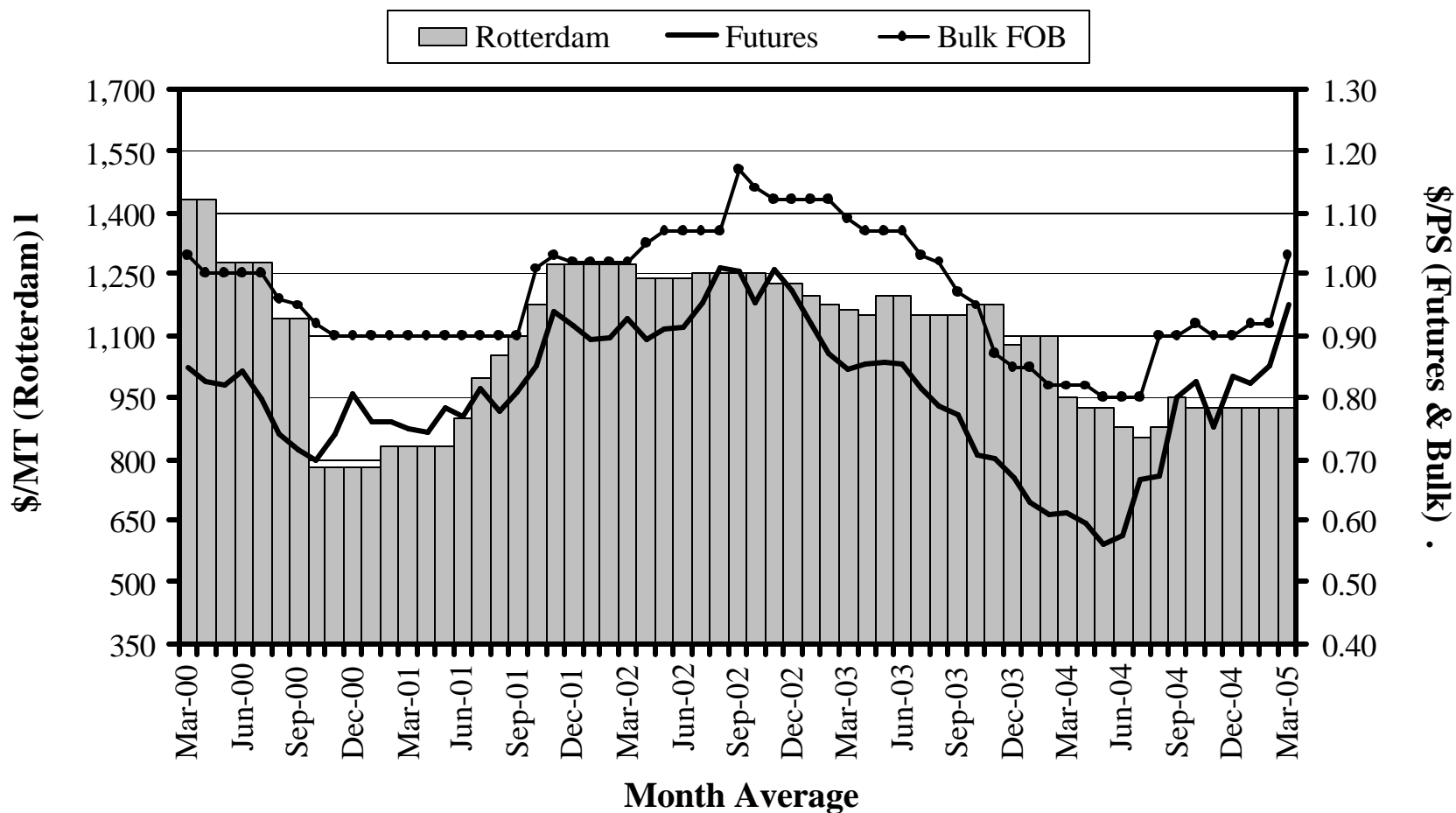
| Item | Volume | | | Price | | |
|---|-------------------------|--------------|--------------|-----------------------|-------------|-------------|
| | 2003-04 | 2004-05 | Change | 2003-04 | 2004-05 | Change |
| | - million SSE gallons - | | - % - | - - \$/SSE gallon - - | | - % - |
| Season^a | | | | | | |
| Refrigerated | 721.9 | 726.7 | +7 | 4.56 | 4.56 | NC |
| NFC | 390.6 | 383.8 | -1.7 | 5.19 | 5.20 | +2 |
| RECON | 331.3 | 342.9 | +3.5 | 3.81 | 3.82 | +3 |
| FCOJ | 79.5 | 70.0 | -11.9 | 3.37 | 3.37 | NC |
| Shelf Stable | 7.4 | 6.3 | -14.9 | 5.29 | 5.27 | -.4 |
| TOTAL | 808.7 | 803.0 | -.7 | 4.45 | 4.48 | +.7 |
| Season-to-Date (Thru 03/19/05)^b | | | | | | |
| Refrigerated | 349.1 | 350.5 | +4 | 4.54 | 4.55 | +.1 |
| NFC | 189.4 | 182.4 | -3.7 | 5.14 | 5.29 | +2.9 |
| RECON | 159.7 | 168.1 | +5.3 | 3.84 | 3.74 | -2.4 |
| FCOJ | 40.0 | 35.2 | -11.9 | 3.36 | 3.33 | -1.0 |
| Shelf Stable | 3.7 | 3.1 | -15.8 | 5.29 | 5.44 | +2.8 |
| TOTAL | 392.8 | 388.9 | -1.0 | 4.43 | 4.44 | +.3 |

^aSeason: preliminary 52-weeks ending 10/02/04 for 2003-04 and estimates for 2004-05.

^bSeason-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 March 2000 Thru March 2005



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

FCOJ and FCGJ Prices – March^a

| Item | 2003-04 | 2004-05 | Change |
|---------------------------------|----------------------------------|-------------|--------------|
| FCOJ | - - - - \$/pounds solids - - - - | | - - % - - |
| Futures | .61 | .95 | +55.7 |
| Florida Bulk FOB | .82 | 1.07 | +30.5 |
| | - - - - \$/metric ton - - - - | | |
| Rotterdam | 950 | 925 | -2.6 |
| FCGJ | - - - - \$/pounds solids - - - - | | - - % - - |
| Florida Bulk FOB – Red | .72 | NA | NA |
| Florida Bulk FOB – White | .75 | NA | NA |

^aPrices are for the following time periods: Futures – March average.

Florida Bulk FCOJ and FCGJ FOB – Week ending 03/19/05.

Rotterdam – March *Foodnews*.

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

FCPA Delivered-In Prices
(Report #26 – Week Ending 04/02/05)

| Variety | Week Ending | | | Season-to-Date | | |
|--|-------------|--------------|---------------|----------------|--------------|---------------|
| | 2003-04 | 2004-05 | Change | 2003-04 | 2004-05 | Change |
| ----- \$/PS ----- | | | | | | |
| Early & Midseason^{a,b} | .648 | .932 | +.284 | .649 | .798 | +.149 |
| Valencias^a | .754 | 1.002 | +.248 | .746 | 1.001 | +.255 |
| White Grapefruit | .544 | 1.781 | +1.237 | .474 | 1.898 | +1.424 |
| Red Grapefruit | .573 | 1.542 | +.969 | .454 | 1.925 | +1.471 |

^aFinal priced, combined.

^bSeason final.

Florida Fresh Orange and Specialty Fruit Shipments and FOB Prices, Season-to-Date Thru 04/10/05

| Variety | Shipments | | | FOB Price | | |
|------------------------------|---------------------------|----------------|--------------|--------------------------|----------------|--------------|
| | 2003-04 STD | 2004-05 STD | Change | 2003-04 STD | 2004-05 STD | Change |
| | - 1,000 4/5-bu. cartons - | | - % - | ----- \$ ----- | | - % - |
| Early & Midseason | 2,858 | 2,784 | -2.6 | 6.41 | 7.63 | +19.0 |
| Navel | 4,248 | 2,954 | -30.5 | 8.73 | 10.60 | +21.4 |
| Valencia | 2,304 | 1,758 | -23.7 | 6.47 | 7.15 | +10.5 |
| Tangelo | 644 | 628 | -2.5 | 8.99 | 9.09 | +1.1 |
| Temple | 552 | 312 | -43.5 | 7.88 | 8.80 | +11.7 |
| Early Tangerines | 4,224 | 3,260 | -22.8 | 11.93^a | 15.30 | +28.2 |
| Honey | 3,378 | 2,448 | -27.5 | 12.78 | 16.84 | +31.8 |
| TOTAL | 18,208 | 14,144 | -22.3 | | | |

^aPrices for Sunburst.

SOURCE: Citrus Administrative Committee.

Selected Competitive Fresh Fruit Shipments

| U.S. Clementine and Tangerine Imports | | | Texas Fresh Grapefruit Shipments | | |
|--|---------|--------|-------------------------------------|---------|--------|
| 2003-04 | 2004-05 | Change | 2003-04 | 2004-05 | Change |
| August – February | | | STD – 04/02/05 | | |
| - - - - million pounds - - - - | | - % - | - - thousand 7/10-bu. cartons - - | | - % - |
| 177.28 | 164.52 | -7.2 | 5,749 | 4,253 | -26.0 |

SOURCE: U.S. Department of Commerce.

SOURCE: Texas Valley Citrus Committee.

Florida Grapefruit-Juice Availability, Movement and Inventory

| Item | Season (October-September) | | | Season-to-Date 04/02/05 (FCPA Week 26) | | |
|--|-------------------------------|------------------------|--------------|---|-------------|--------------|
| | 2003-04 ^a | 2004-05 ^{e,b} | Change | 2003-04 | 2004-05 | Change |
| | - million SSE gallons - | | - % - | - million SSE gallons - | | - % - |
| Beginning Inventory^c | 74.3 | 65.0 | -12.6 | 74.3 | 65.0 | -12.6 |
| Pack from Fruit^{d,e} | 120.4 | 37.5 | -68.9 | 87.5 | 33.1 | -62.2 |
| Availability | 194.7 | 102.5 | -47.4 | 161.9 | 98.1 | -39.4 |
| Movement | 130.0 | 81.1 | -37.6 | 60.1 | 38.3 | -36.4 |
| FCGJ ^f | 95.6 | 55.3 | -42.2 | 44.0 | 28.6 | -35.0 |
| NFC ^g | 34.4 | 25.8 | -25.1 | 16.1 | 9.6 | -40.3 |
| Ending Inventory | 64.7 | 21.4 | -66.9 | 101.7 | 59.8 | -41.2 |
| | - - weeks supply - - | | - % - | - - weeks supply - - | | - % - |
| Carryover | 26.4 | 13.7 | -48.0 | 44.0 | 40.7 | -7.5 |

^a53 weeks.

^b52 weeks.

^c2004-05 beginning inventory adjusted (bulk chilled GJ put on a 10.0° Brix gallon basis).

^dFCPA members only except for season data which includes an estimate of other Florida production by non-members.

^eIncludes 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.

^fExcludes CGJ used in FCGJ.

^gExcludes movement of reconstituted chilled grapefruit juice.

U.S. Grapefruit-Juice Exports

| Country | Season (October-September) | | | Season-to-Date (October-February) | | |
|---------------|-------------------------------|-----------------------|---------------------|--------------------------------------|--------------|--------------------------|
| | 2003-04 | 2004-05 ^{ea} | Change ^a | 2003-04 | 2004-05 | Change |
| | - million SSE gallons - | | - % - | - million SSE gallons - | | - % - |
| Canada | 3.38 | 2.10 | -37.9 | 1.26 | 1.29 | +2.4 |
| Europe | 21.45 | 13.20 | -38.5 | 7.79 | 3.32 | -57.4 |
| Japan | 15.93 | 9.70 | -39.1 | 4.08 | 5.31 | +30.1 |
| Other | 1.54 | 1.0 | -35.1 | .66 | .77 | +16.7 |
| TOTAL | 42.31 | 26.0 | -38.5 | 13.78 | 10.69 | -22.4^b |

^aFDOC estimates.

^bFPCA exports of GJ for the 2004-05 season were down 47.8%, season to-date thru 04/02/05.

SOURCE: U.S. Department of Commerce.

U.S. Retail Grapefruit-Juice Sales

| Item | Volume | | | Price | | |
|---|-------------------------|-------------|--------------|-----------------------|-------------|--------------|
| | 2003-04 | 2004-05 | Change | 2003-04 | 2004-05 | Change |
| | - million SSE gallons - | | - % - | - - \$/SSE gallon - - | | - % - |
| Season^a | | | | | | |
| NFC | 17.2 | 11.7 | -32.0 | 5.33 | 6.13 | +15.0 |
| RECON | 15.5 | 11.6 | -25.2 | 4.56 | 5.37 | +17.8 |
| FCGJ | 1.6 | .7 | -56.3 | 3.44 | 4.25 | +23.5 |
| TOTAL | 34.2 | 24.0 | -29.8 | 4.90 | 5.76 | +17.6 |
| Season-to-Date (Thru 03/19/05)^b | | | | | | |
| NFC | 8.0 | 5.6 | -30.3 | 5.31 | 6.14 | +15.7 |
| RECON | 7.6 | 6.0 | -20.4 | 4.51 | 5.05 | +12.0 |
| FCGJ | .8 | .8 | -1.8 | 3.42 | 3.28 | -4.0 |
| TOTAL | 16.4 | 12.4 | -24.4 | 4.85 | 5.43 | +12.0 |

^aSeason: preliminary 52-weeks ending 10/02/04 for 2003-04 and estimates for 2004-05.

^bSeason-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, By Season (August-July) and Season-to-Date Thru 04/10/05

| Shipments | Season (August-July) | | | Season-to-Date Thru 04/10/05 | | |
|--------------------------------|---------------------------|---------------------------------|---------------------|------------------------------|---------------------------------|---------------------|
| | 03-04 ^a | 04-05 ^e ^b | Change ^b | 03-04 ^a | 04-05 ^p ^c | Change ^c |
| | - 1,000 4/5-bu. cartons - | | - % - | - 1,000 4/5-bu. cartons - | | - % - |
| Domestic & Canadian | 10,775 | 5,410 | -49.8 | 9,368 | 5,034 | -46.3 |
| Offshore Exports | 19,575 | 8,390 | -57.1 | 19,065 | 7,602 | -60.1 |
| TOTAL | 30,350 | 13,800 | -54.5 | 28,433 | 12,636 | -55.6 |

^aCitrus Administrative Committee.

^bFDOC estimates.

^cPreliminary.

Florida Fresh Grapefruit Domestic and Export Shipments

| Country | Season (August - July) | | | Season-to-Date (August 1 – April 3) | | |
|----------------------|---------------------------|----------------------|---------------------|--|---------------|--------------|
| | 2003-04 | 2004-05 ^e | Change ^a | 2003-04 | 2004-05 | Change |
| | - thousand cartons - | | - % - | - thousand cartons - | | - % - |
| United States | 8,995 | 4,656 | -48.2 | 7,601 | 4,213 | -44.6 |
| Canada | 1,780 | 754 | -57.6 | 1,503 | 677 | -55.0 |
| Europe | 6,909 | 3,010 | -56.4 | 6,403 | 2,694 | -57.9 |
| Japan | 12,123 | 5,271 | -56.5 | 11,814 | 4,705 | -60.2 |
| Other | 543 | 110 | -79.7 | 466 | 111 | -76.2 |
| TOTAL | 30,350 | 13,800 | -54.5 | 27,787 | 12,400 | -55.4 |

^aFDOC estimates.
SOURCE: Florida Department of Citrus.

Florida Fresh Grapefruit Domestic FOB Prices Season-to-Date Thru 04/10/05

| Variety | FOB Price | | |
|---------------------|----------------|-------------|---------|
| | 2003-04 STD | 2004-05 STD | Change |
| | ----- \$ ----- | | -- % -- |
| GULF COAST | | | |
| White | 7.69 | 13.76 | +78.9 |
| Colored | 7.57 | 13.83 | +82.7 |
| INDIAN RIVER | | | |
| White | 8.53 | -- | -- |
| Colored | 8.22 | 14.88 | +81.0 |
| SUNRIDGE | | | |
| White | 7.77 | -- | -- |
| Colored | 7.31 | 13.80 | +88.8 |

SOURCE: Citrus Administrative Committee.

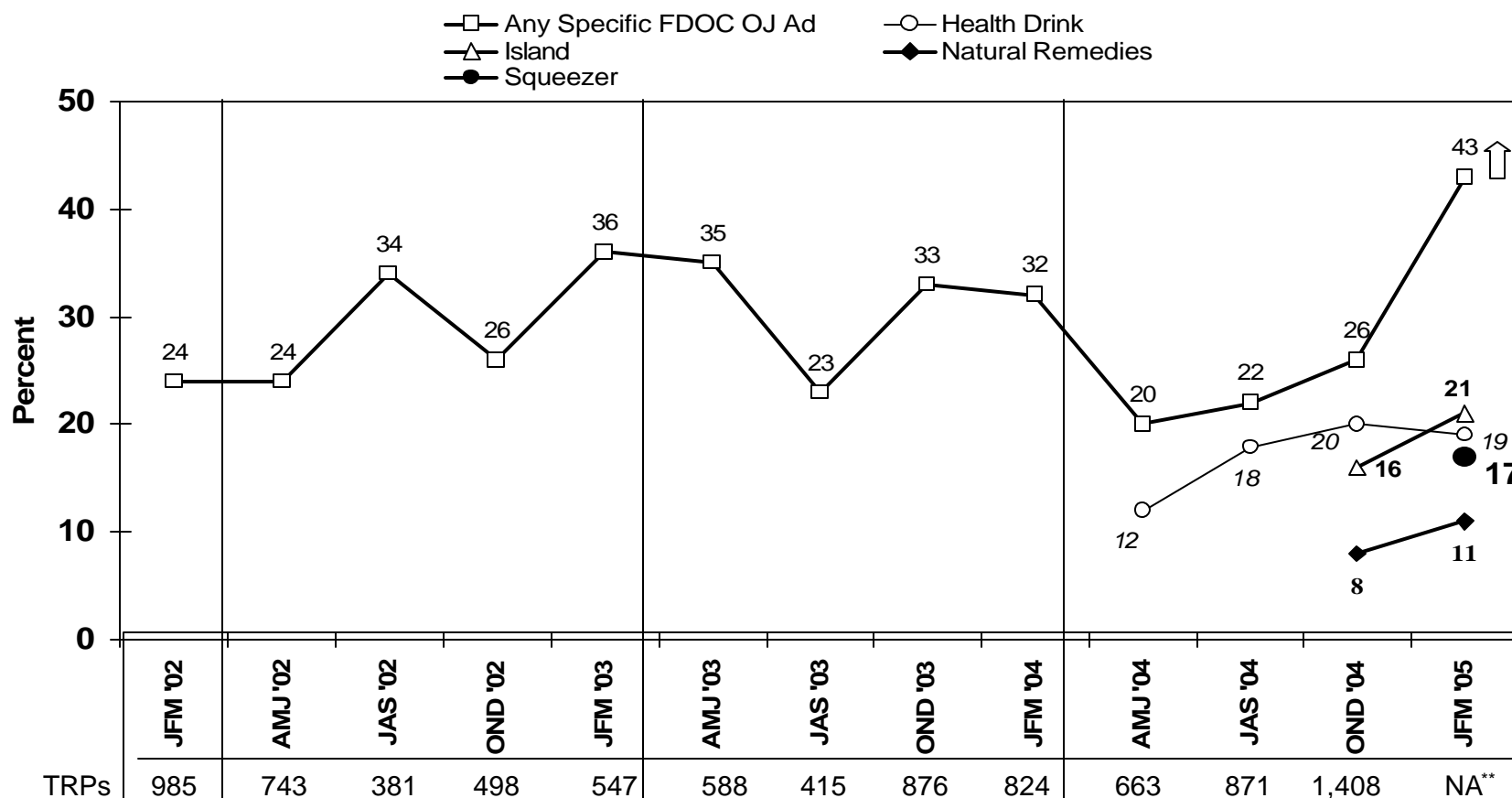
Foreign Exchange Rates

| Date | Euro Per \$US | Yen Per \$US |
|-----------------------------|----------------|------------------|
| ANNUAL | | |
| 2001 | 1.11700 | 121.55551 |
| 2002 | 1.06106 | 125.21937 |
| 2003 | 0.88540 | 115.97995 |
| 2004 | 0.80510 | 108.17451 |
| 2005 (Thru 04/15/05) | 0.76419 | 104.95600 |
| WEEK ENDING 04/15/05 | | |
| 2004 | 0.83014 | 106.61571 |
| 2005 | 0.77434 | 108.01571 |
| % Change | -6.7% | +1.3% |

RANDOM

Trended % of General Population Who Clearly Recall Specific OJ TV Ads in the Past 2 Weeks*

**PAST 2
WEEK
RECALL**



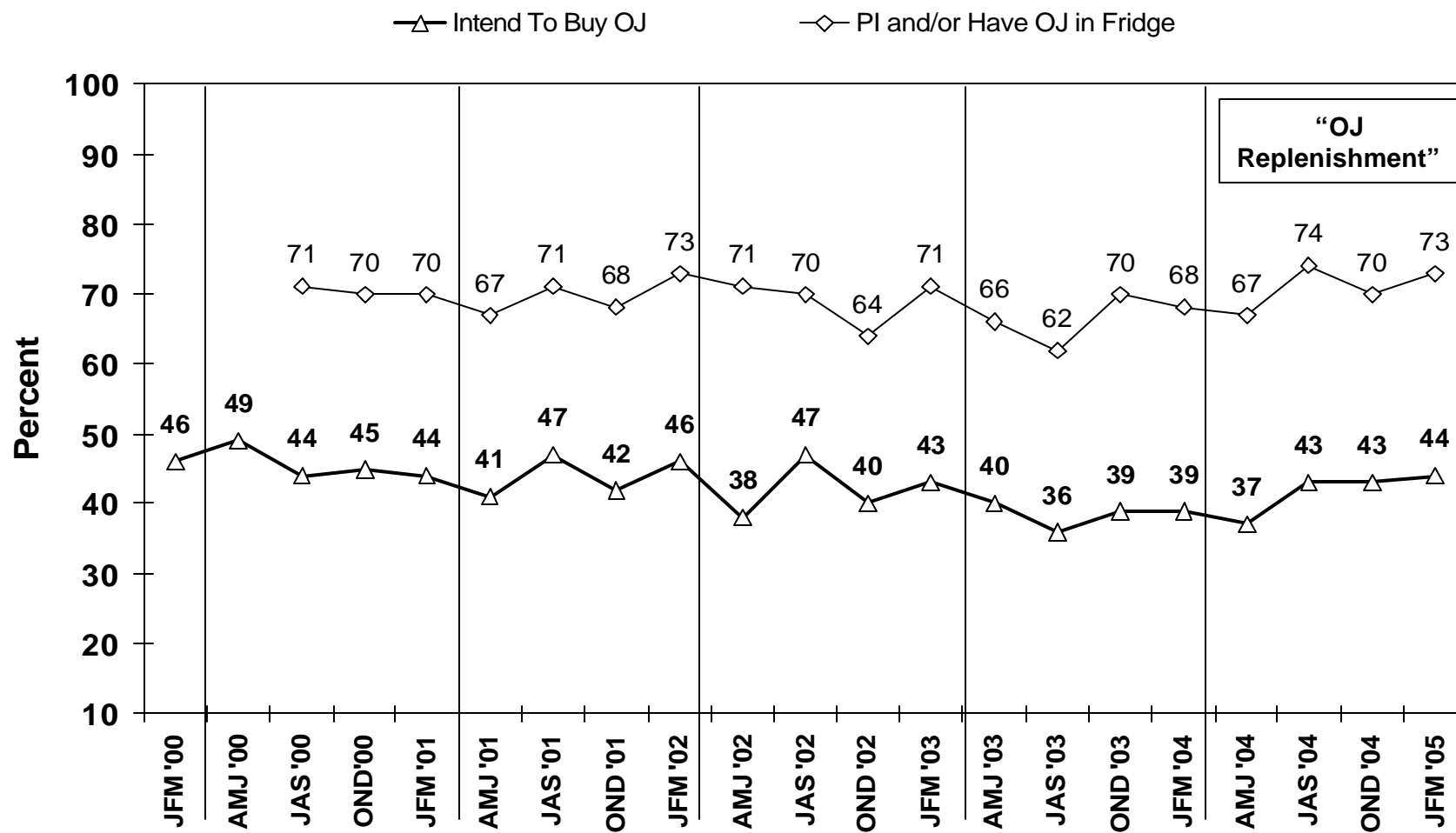
*Themeline present in "Island," "Natural Remedies," and "Squeezer" ads; however, themeline NOT spoken in 15 second ads. Health Drink was added May 2004 and was the only ad aired from May 2004– Oct. 2004. Island and Natural Remedies added Nov. 2004. Squeezer added Feb. 2005.

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

**To be obtained from ad agency.

SOURCE: Data Development Worldwide.

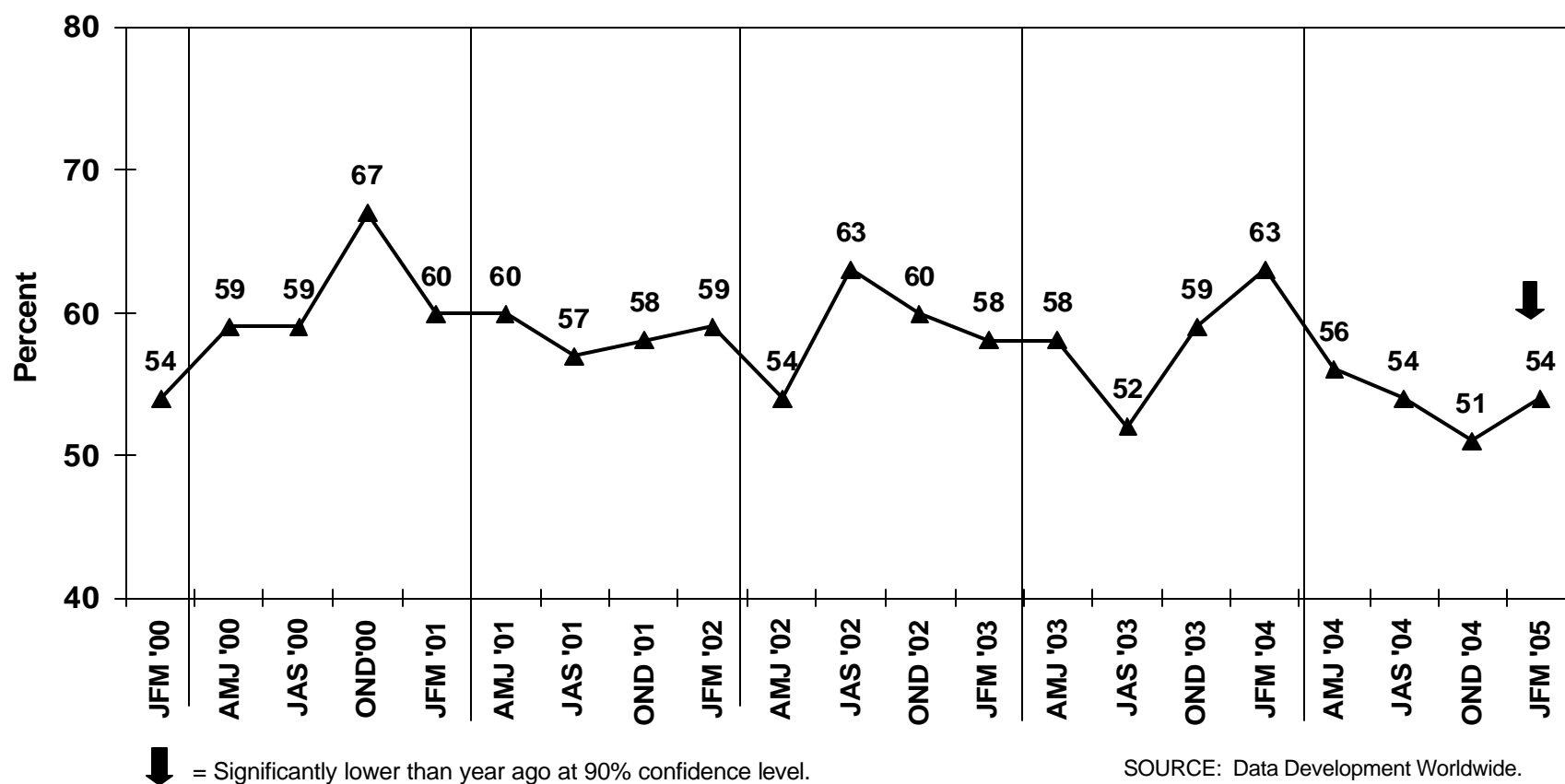
Intending to Purchase Orange Juice on Next Shopping Trip



SOURCE: Data Development Worldwide.

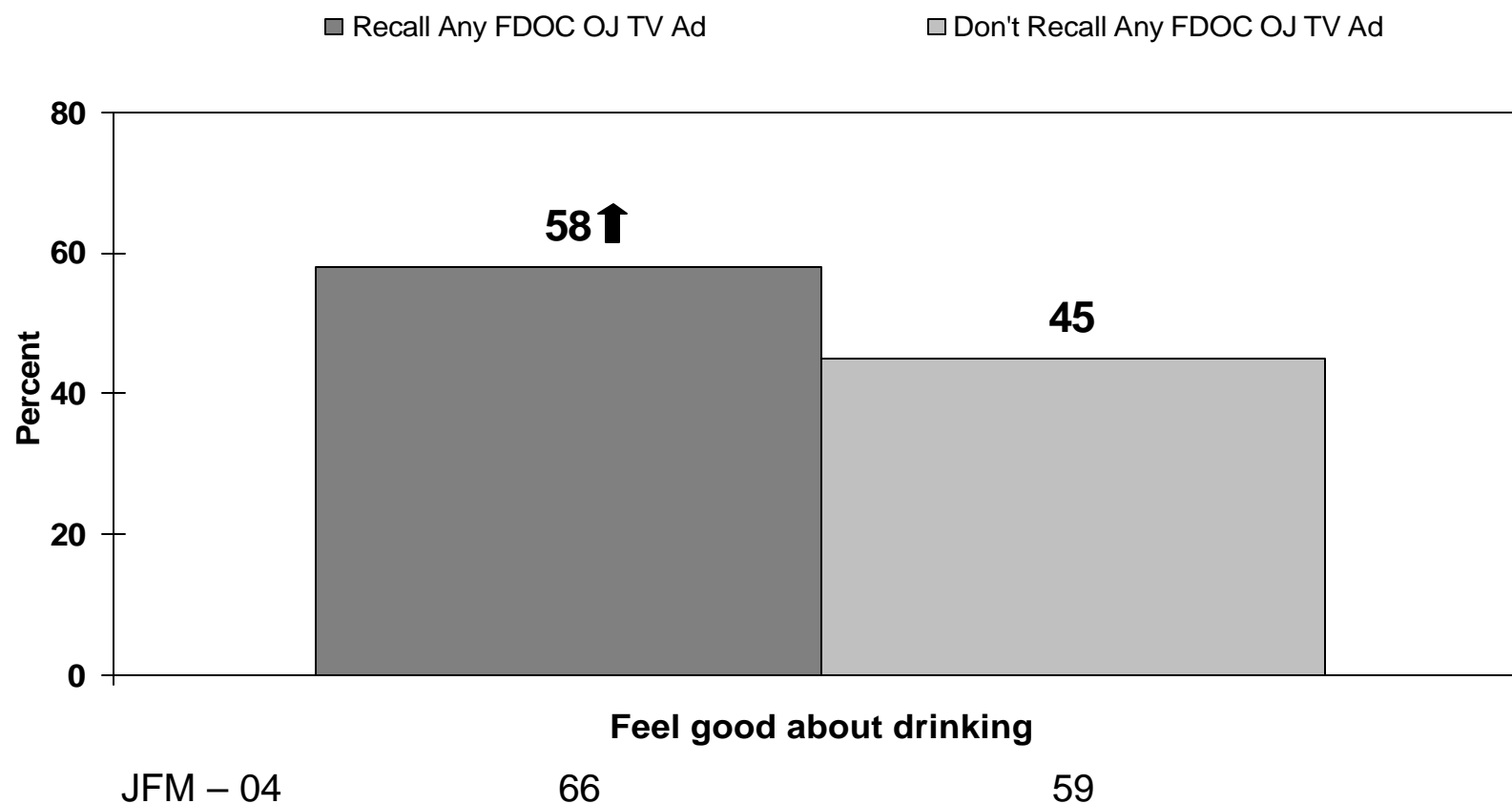
How Would You Rate Orange Juice For “Being a Drink You Feel Good about Drinking?”

% Rating 9 or 10 on a 10-Point Scale



SOURCE: Data Development Worldwide.

“Being a Drink You Feel Good About Drinking” FDOC OJ Ad Recallers vs. Non-Recallers - JFM '05



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

SOURCE: Data Development Worldwide.