# Florida Citrus Economic & Market Indicators
## July, 2010




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# Summary Comments

- For the 2009-10 season (July-June), Brazil's OJ exports were up .4% from the previous year with exports to NAFTA countries, Europe and the Far East up 26.7%, down 5.5% and up 17.1%, respectively.
- Season-to-date through 07/03/10, Florida OJ availability, movement and ending inventories were down 10.8%, 8.7% and 12.8%, respectively, from last season.
- For October through March of the 2009-10 season, U.S. OJ imports and exports were up 11.4% and 7.4%, respectively. For 2009-10, season-to-date through 07/03/10, Florida OJ exports were up 41.9% (FDOC Processors report).
- For October through May of the 2009-10 season, Non-FDOC Processor FCOJ disappearance, based on FCOJ inventories and imports, was down 15.0%.
- Season-to-date through 06/12/10, OJ volume sales in all Nielsen retail outlets (U.S. grocery stores doing $2 million plus business, Wal-Mart stores excluding Sam's Clubs, mass merchandisers and drug stores doing $1 million plus business) were down 1.1% from the previous season, with the NFC price down 2.5%, the Recon price down 6.6% and the overall OJ price down 4.0%.
- The June average FCOJ Futures price was $1.41/PS, up $.59/PS from last year. The Florida bulk FCOJ FOB price was $1.52/PS for the week ending 06/26/10, up $.60/PS from last year; while the Rotterdam price was at an estimated $2,275/MT, up $1,300/MT from last year.
- The season delivered-in price for early and midseason oranges was $1.32/PS, up $.31/PS from last season; the delivered-in price for Valencia oranges was $1.55/PS, up $.42/PS from last season; delivered-in prices for white and red grapefruit juice were $1.16/PS and $1.12/PS, up $.58/PS and $.47/PS from last season, respectively.
- Season-to-date through 06/27/10, fresh orange and specialty citrus shipments were down 12.2% from last season.
- Season-to-date through May, clementine/tangerine imports were down 11.8%. Season-to-date through 06/13/10, Texas fresh grapefruit shipments were up 2.3%.
- Season-to-date through 07/03/10, Florida GJ availability, movement and ending inventory were down 18.3%, 31.9% and 4.7%, respectively.
- For October through May of 2009-10, U.S. GJ exports were down 39.4%. Season-to-date through 07/03/10, Florida GJ exports were down 42.7% (FDOC Processors report).
- Season-to-date through 06/12/10, GJ volume sales in all Nielsen retail outlets were down 5.3% from last season, with the overall GJ price up .4%.
- Season-to-date through 06/27/10, Florida fresh grapefruit shipments were up .5% from last season, with Domestic/Canadian shipments up 1.9% and offshore shipments down .5% (CAC). Season-to-date through 06/27/10, certified shipments to Europe and Japan were down 11.9% and up 4.0%, respectively. Season-to-date through 06/13/10, Domestic FOB prices (CAC) for fresh white and colored grapefruit were up 40.9% and 25.3%, respectively.
- For the week ending 07/15/10 versus the same period last year, the Euro-per-Dollar exchange rate was up 10.2%, while the Yen-per-Dollar was down 4.7%.
- Communication awareness has dropped slightly from Q4-2009 despite similar levels of spend.
- There has been no significant change in purchasing trends in Q1-2010.
- There was a small increase in the number of regular drinkers during Q1-2010; however, this was offset by a slight decrease in more frequent drinkers.
- During Q1-2010, satisfaction with orange juice steadied at levels consistent with its pre-Q3-2009 peak.

# Brazil Orange-Juice Exports

| Destination | Final (July-June) | | |
|---|---|---|---|
| | 2008-09 | 2009-10 | Change |
| | - - - - - million SSE gallons[a] - - - - - | | - % - |
| NAFTA[b] | 205.1 | 259.9 | +26.7 |
| Europe[c] | 1,320.8 | 1,248.6 | -5.5 |
| Far East[d] | 161.4 | 189.1 | +17.1 |
| Others | 91.4 | 89.2 | -2.4 |
| TOTAL | 1,778.8 | 1,786.7 | +.4 |

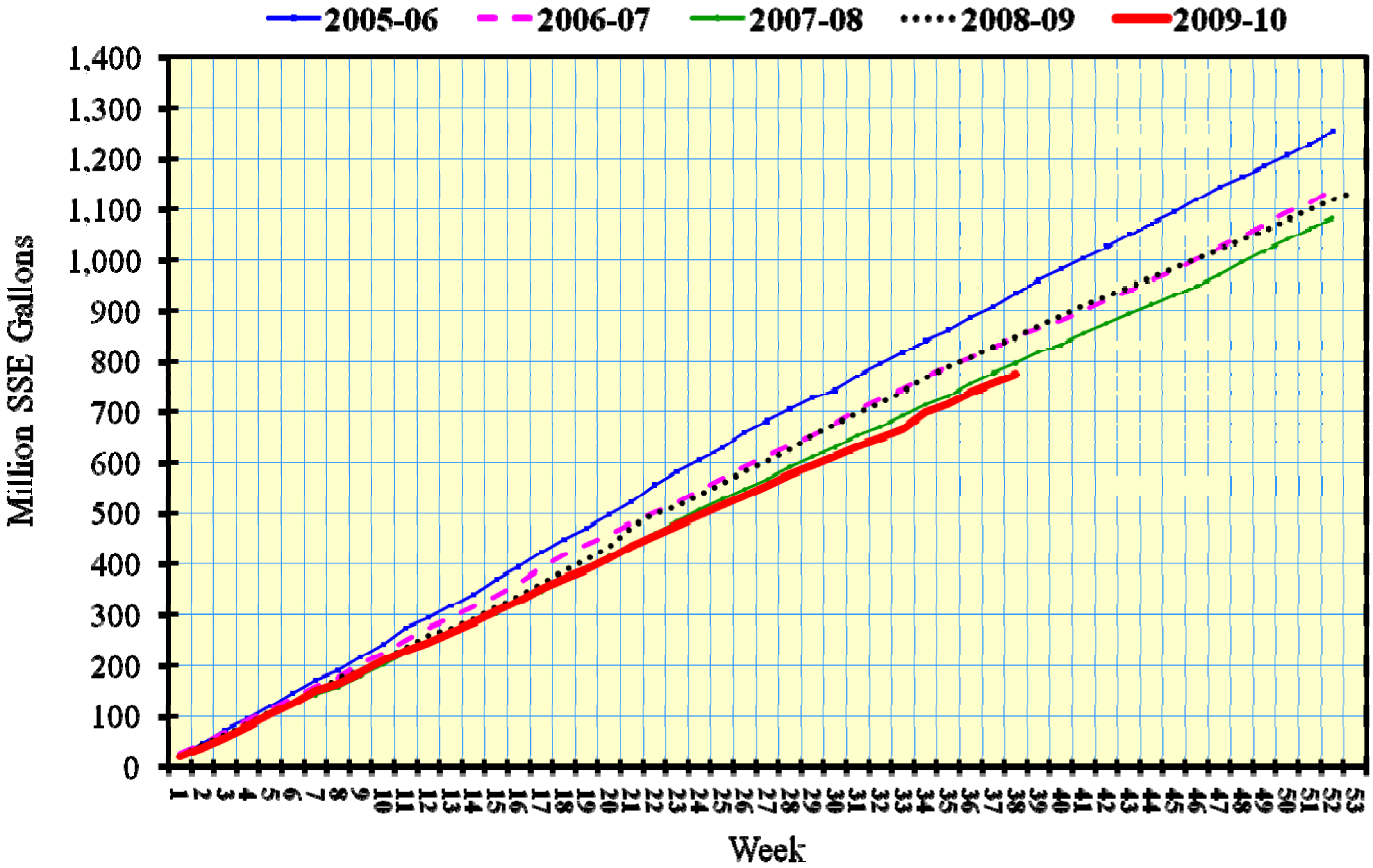
[a]Assumes exports with codes 2009.11.00 (FCOJ) and 2009.19.00 (Other) are 66° Brix, while exports with code 2009.12.00 (NFC) are 11.6° Brix.
[b]U.S., Canada, and Mexico.
[c]Russia, Ukraine, and Turkey are included in Europe.
[d]China, Japan, Taiwan, Hong Kong, Macau, South Korea, North Korea, Philippines, and Vietnam.
SOURCE: SECEX.

# Florida Orange-Juice Availability, Movement and Inventory

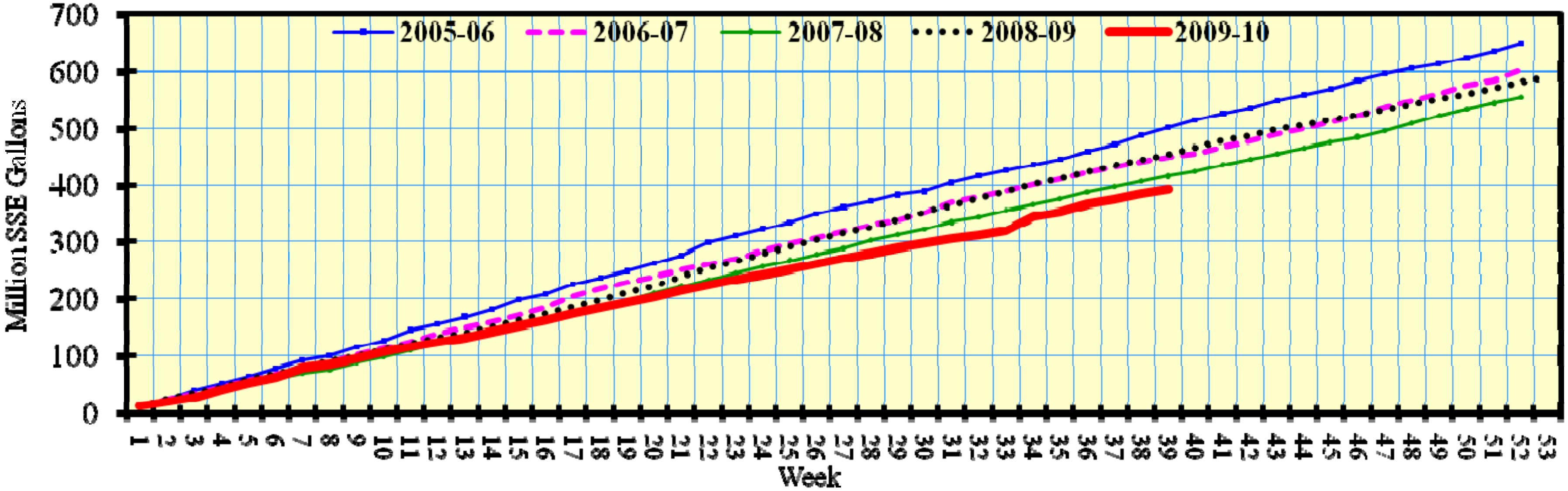
| Item | Season (October-September) | | | Season-to-Date 07/03/10 (FDOC Processor Week 39) | | |
|---|---|---|---|---|---|---|
| | 2008-09 | 2009-10e | Change | 2008-09 | 2009-10 | Change |
| | - million SSE gallons - | | - % - | - million SSE gallons - | | - % - |
| **Beginning Inventory** | **624.2** | **672.9** | **+7.8** | **624.2** | **672.9** | **+7.8** |
| **Pack from Fruit[a]** | **1,034.7** | **808.8** | **-21.8** | **1,023.0** | **797.3** | **-22.1** |
| **Imports[a,b]** | **152.4** | **144.3** | **-5.3** | **114.1** | **101.6** | **-10.9** |
| **Availability** | **1,811.3** | **1,626.0** | **-10.2** | **1,761.2** | **1,571.8** | **-10.8** |
| **Movement** | **1,138.4** | **1,037.6** | **-8.9** | **868.5** | **793.2** | **-8.7** |
| FCOJ | 591.1 | 506.8 | -14.3 | 455.2 | 393.1 | -13.6 |
| NFC[c] | 547.3 | 530.8 | -3.0 | 413.3 | 400.1 | -3.2 |
| **Ending Inventory** | **672.9** | **588.4** | **-12.6** | **892.7** | **778.6** | **-12.8** |
| FCOJ | **470.8** | **432.6** | **-8.1** | 576.0 | 502.6 | -12.7 |
| NFC | **202.2** | **155.6** | **-23.0** | 316.7 | 276.0 | -12.8 |
| | - - weeks supply - - | | - % - | - - weeks supply - - | | - % - |
| **Carryover – STD[d]** | **31.3** | **29.5** | **-5.9** | **40.1** | **38.3** | **-4.5** |
| FCOJ[d] | 42.4 | 49.8 | +17.4 | 49.4 | 49.9 | +1.0 |
| COJ[d] | 18.3 | 15.1 | -17.5 | 27.6 | 25.7 | -7.0 |

[a]FDOC Processor non-member Florida product included in pack from fruit for season data but included in imports for season-to-date data.
[b]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.
[c]Excludes movement of reconstituted chilled orange juice and evaporated COJ.
[d]Season-to-date weeks supply based on season-to-date movement.

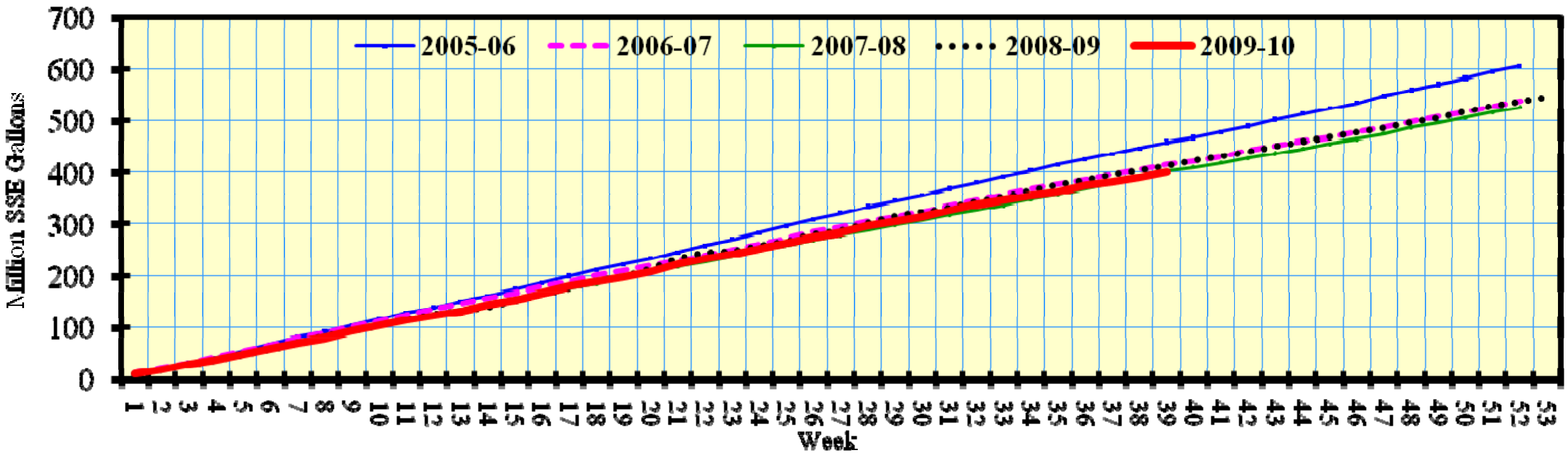
# Florida Orange-Juice Movement



## Florida FCOJ Movement




## Florida NFC-OJ Movement



# U.S. Orange-Juice Imports[a]

| Country | Season-to-Date (October-May) | | | | | |
|---|---|---|---|---|---|---|
| | TOTAL OJ | | | NFC-OJ | | |
| | 2008-09 | 2009-10 | Change | 2008-09 | 2009-10 | Change |
| | - - mil. SSE gal. - - | | - % - | - - mil. SSE gal. - - | | - % - |
| **Brazil** | **108.92** | **129.84** | **+19.2** | **42.87** | **29.15** | **-32.0** |
| **CBI[b]** | **30.85** | **31.74** | **+2.9** | **.13** | **.09** | **-30.8** |
| **Mexico** | **71.51** | **75.78** | **+.4** | **.88** | **3.06** | **+247.7** |
| **Other** | **5.38** | **3.92** | **-27.1** | **.02** | **.01** | **-.5** |
| **TOTAL** | **216.66** | **241.28** | **+11.4** | **43.90** | **32.32** | **-26.4** |

[a]Includes OJ with added vitamins and minerals.

[b]Includes Dominican Republic-Central America initiatives.

SOURCE: U.S. Department of Commerce.

# Non-FDOC Processor FCOJ Disappearance Index

| Item | Season-to-Date (October-May) | | |
|---|---|---|---|
| | 2008-09 | 2009-10 | Change |
| | - million SSE gallons - | | - % - |
| Beginning Inventory[a] | 57.3 | 23.7 | -58.6 |
| Foreign Imports[b] | 101.7 | 134.7 | +32.4 |
| Availability[c] | 159.0 | 158.4 | -.4 |
| Ending Inventory[a] | 40.2 | 57.5 | +43.0 |
| Non-FDOC Proc. FCOJ Disappearance[d] | 118.8 | 100.9 | -15.0 |

[a]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.
[b]U.S. Department of Commerce, FCOJ imports (excludes bonded product) minus FDOC Processor, FCOJ foreign product imported by members (includes bonded product).
[c]Beginning inventory and imports.
[d]Partial measure of non-Florida presumed consumption. Omits non-Florida, U.S. production and exports.

# U.S. Orange-Juice Exports[a,b]

| Country | Season-to-Date (October-May) | | |
|---|---|---|---|
| | 2008-09 | 2009-10 | Change |
| | - - - million SSE gallons - - - | | - % - |
| Canada | 45.34 | 43.46 | -4.1 |
| Europe | 24.91 | 34.14 | +37.1 |
| Japan | 2.49 | .56 | -77.5 |
| Other | 16.84 | 18.02 | +7.0 |
| TOTAL | 89.58 | 96.19 | +7.4 |

[a]Includes OJ with added vitamins and minerals.
[b]FDOC Processor exports of OJ for the 2009-10 season were up 41.9%, season-to-date through 07/03/10.
SOURCE: U.S. Department of Commerce.

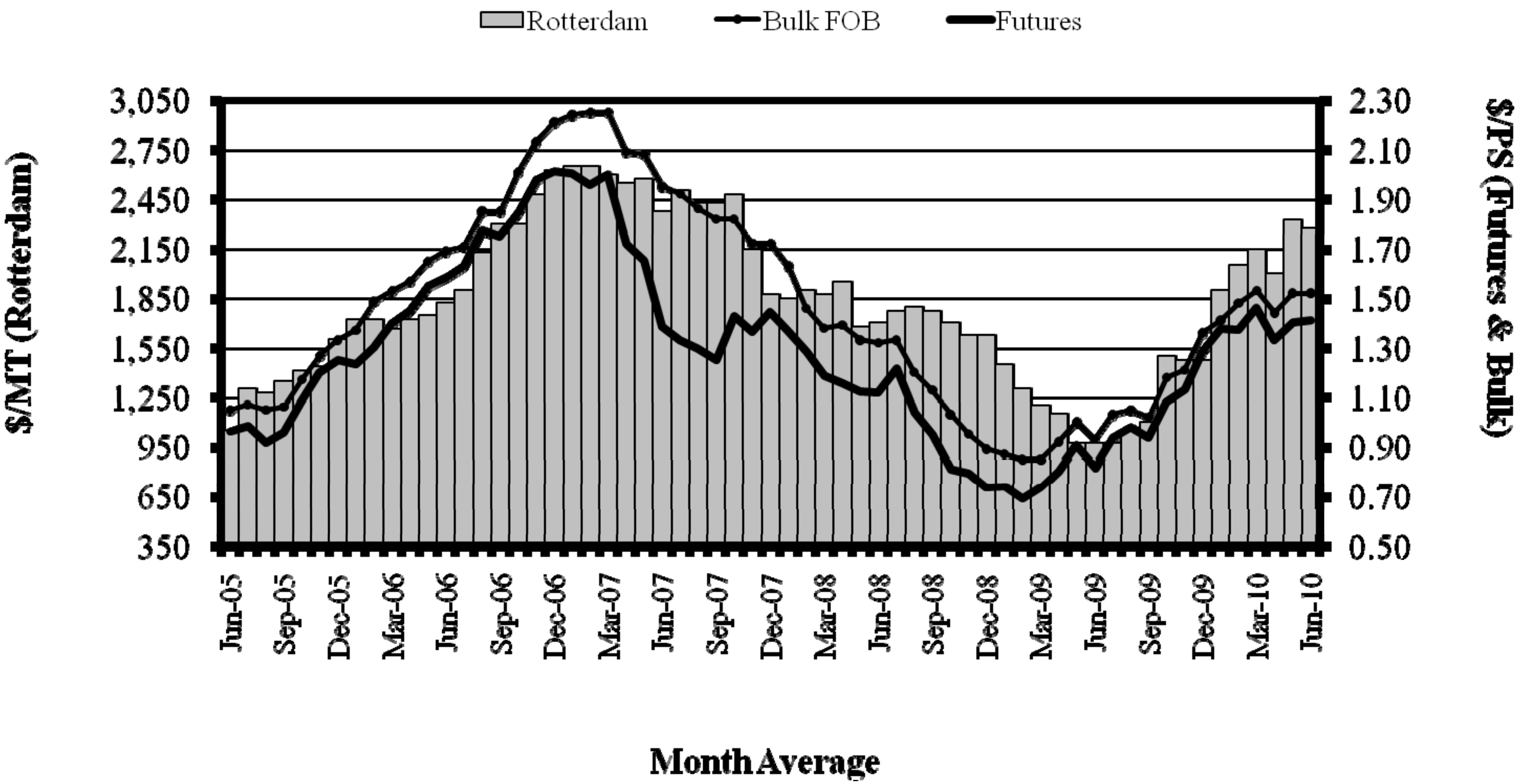
# U.S. Retail Orange-Juice Sales

| Item | Volume | | | Price | | |
|---|---|---|---|---|---|---|
| | 2008-09p | 2009-10f | Change | 2008-09p | 2009-10f | Change |
| | - million SSE gallons - | | - % - | - - $/SSE gallon - - | | - % - |
| **SEASON:** | | | | | | |
| **Refrigerated** | **577.9** | **572.6** | **-.9** | **5.68** | **5.55** | **-2.3** |
| NFC | 317.1 | 312.1 | -1.6 | 6.59 | 6.47 | -1.8 |
| RECON | 260.8 | 260.5 | -.1 | 4.57 | 4.44 | -2.8 |
| **FCOJ** | **45.2** | **37.7** | **-16.6** | **4.66** | **4.58** | **-1.7** |
| **Shelf Stable** | **5.4** | **3.3** | **-39.8** | **6.74** | **7.00** | **+3.8** |
| **TOTAL** | **628.5** | **613.5** | **-2.4** | **5.61** | **5.49** | **-2.2** |
| **SEASON-TO-DATE: (through 06/12/10)[a]** | | | | | | |
| **Refrigerated** | **406.24** | **408.67** | **+.6** | **5.75** | **5.50** | **-4.3** |
| NFC | 225.47 | 222.76 | -1.2 | 6.61 | 6.44 | -2.5 |
| RECON | 180.78 | 185.91 | +2.8 | 4.67 | 4.37 | -6.6 |
| **FCOJ** | **32.67** | **26.92** | **-17.6** | **4.66** | **4.56** | **-2.3** |
| **Shelf Stable** | **3.83** | **2.32** | **-39.4** | **6.77** | **6.93** | **+2.4** |
| **TOTAL** | **442.74** | **437.91** | **-1.1** | **5.68** | **5.45** | **-4.0** |

[a]Actual for 2008-09 and preliminary for 2009-10.

SOURCE: Nielsen—Data are for U.S. grocery stores 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
## June 2005 through June 2010




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

# FCOJ Prices – June[a]

| Item | 2008-09 | 2009-10 | Change |
|---|---|---|---|
| | - - - - $/pounds solids - - - - | | - - % - - |
| **FCOJ Florida Bulk FOB** | **.92** | **1.52** | **+65.2** |
| **FCOJ Futures** | **.82** | **1.41** | **+72.0** |
| | - - - - $/metric ton - - - - | | |
| **FCOJ Rotterdam** | **975** | **2,275** | **+133.3** |

[a]Prices are for the following time periods: Florida Bulk FCOJ FOB – Week ending 06/26/10.
Futures – June average.
Rotterdam – June *Foodnews.*

SOURCES: IntercontinentalExchange, Inc. (Futures); Florida Citrus Mutual (Florida Bulk FCOJ FOB); *Foodnews* (Rotterdam).

# FDOC Processor Delivered-In Prices

## Preliminary Season Final Prices

| Variety | Week Ending | | | Season-to-Date | | |
|---|---|---|---|---|---|---|
| | 2008-09 | 2009-10 | Change | 2008-09 | 2009-10 | Change |
| | - - - - - - - - - - - - - - - - - - - $/PS - - - - - - - - - - - - - - - - - - - | | | | | |
| **Early & Midseason[a,b]** | -- | -- | -- | 1.010 | 1.318 | +.308 |
| **Valencias[a]** | -- | -- | -- | 1.134 | 1.549 | +.415 |
| **White Grapefruit** | .750 | 1.150 | +.400 | .585 | 1.162 | +.577 |
| **Red Grapefruit** | .800 | .937 | +.137 | .649 | 1.118 | +.469 |

[a]Final priced, combined.
[b]Season final.

# Sao Paulo Processed Orange Delivered-In Prices

## Monthly Average and Season-to-Date

| Season | June Average | | Final (July-June)[a] | |
|---|---|---|---|---|
| | Price | Change From Year Ago | Price | Change From Year Ago |
| | - $/box[b] - | - - % - - | - $/box[b] - | - - % - - |
| 2007-08 | 6.01 | +45.9 | 5.97 | +8.6 |
| 2008-09 | 1.88 | -68.7 | 3.57 | -40.2 |
| 2009-10 | 8.22 | +337.2 | 4.50 | +26.1 |

[a] Unweighted average of monthly prices.

[b] In U.S. dollars as reported at the CEPEA website.

SOURCE: CEPEA website – http://www.cepea.esalq.usp.br

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

| Variety | Shipments thru 06/27/10 | | | FOB Price thru 06/13/10 | | |
|---|---|---|---|---|---|---|
| | 2008-09 STD | 2009-10 STD | Change | 2008-09 STD | 2009-10 STD | Change |
| | - 1,000 4/5-bu. cartons - | | - % - | - - - - $/carton - - - - | | - % - |
| Early, Mids & Temples[a] | 2,848 | 2,850 | +.1 | 8.45 | 10.66 | +26.2 |
| Navel | 3,880 | 2,870 | -26.0 | 10.46 | 13.62 | +30.2 |
| Valencia | 4,188 | 3,010 | -28.1 | 8.33 | 11.12 | +33.5 |
| Tangelo | 827 | 637 | -23.0 | 9.37 | 11.24 | +20.0 |
| Early Tangerines[b] | 3,431 | 2,695 | -21.5 | 12.43 | 16.33 | +31.4 |
| Honey | 1,687 | 2,749 | +63.0 | 15.36 | 15.23 | -.8 |
| TOTAL | 16,861 | 14,811 | -12.2 | | | |

[a]Prices for Early & Mids.
[b]Prices for Sunburst.
SOURCE: Citrus Administrative Committee.

# Selected Competitive Fresh Fruit Shipments

| U.S. Clementine and Tangerine Imports | | | Texas Fresh Grapefruit Shipments | | |
|---|---|---|---|---|---|
| 2008-09 | 2009-10 | Change | 2008-09 | 2009-10 | Change |
| August-May | | | STD – 06/13/10 | | |
| - - - - million pounds - - - - | | - % - | - - thousand 7/10-bu. cartons - - | | - % - |
| **223.94** | **197.58** | **-11.8** | **6,061** | **6,203** | **+2.3** |

SOURCE: U.S. Department of Commerce.

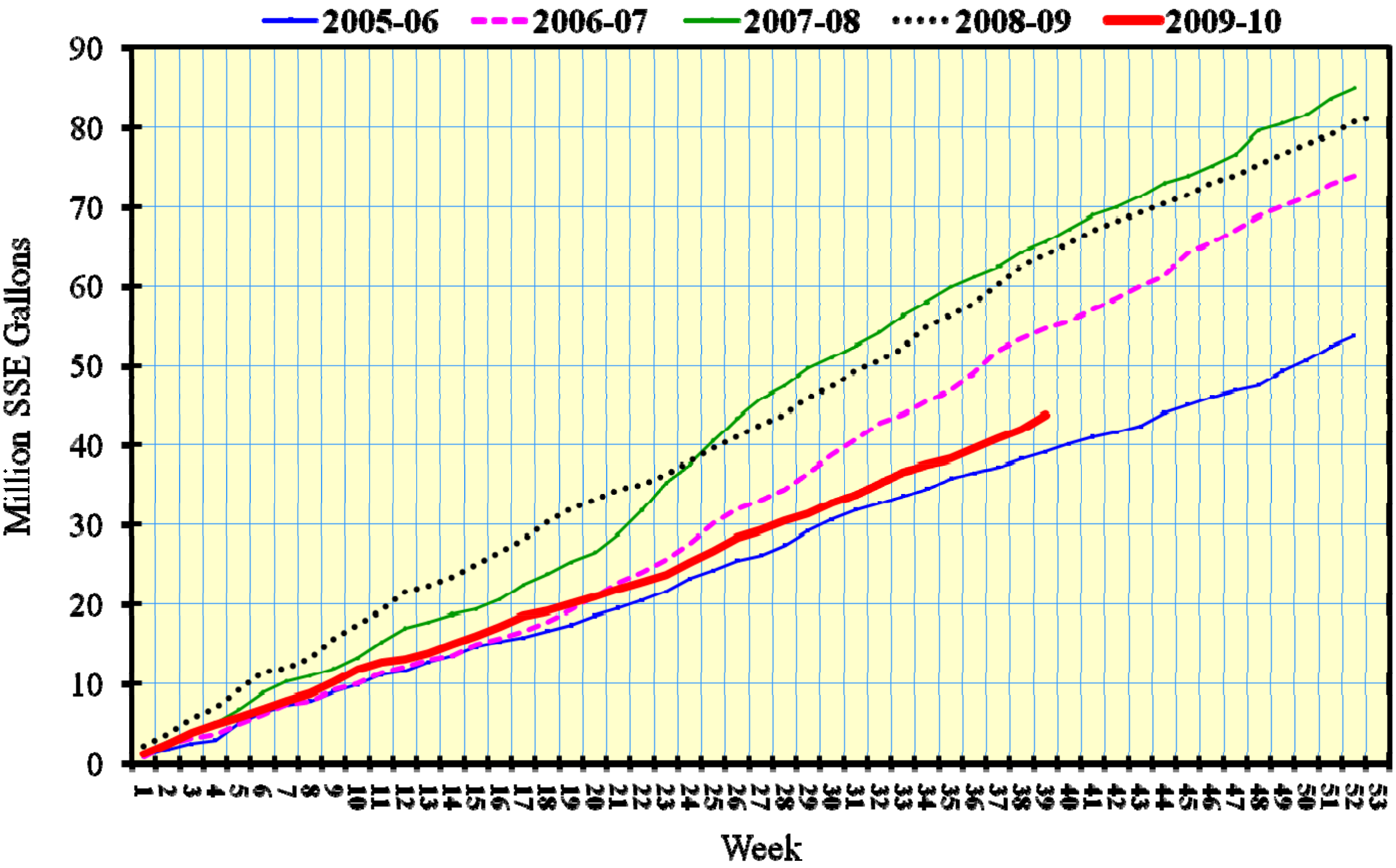
SOURCE: Citrus Administrative Committee.

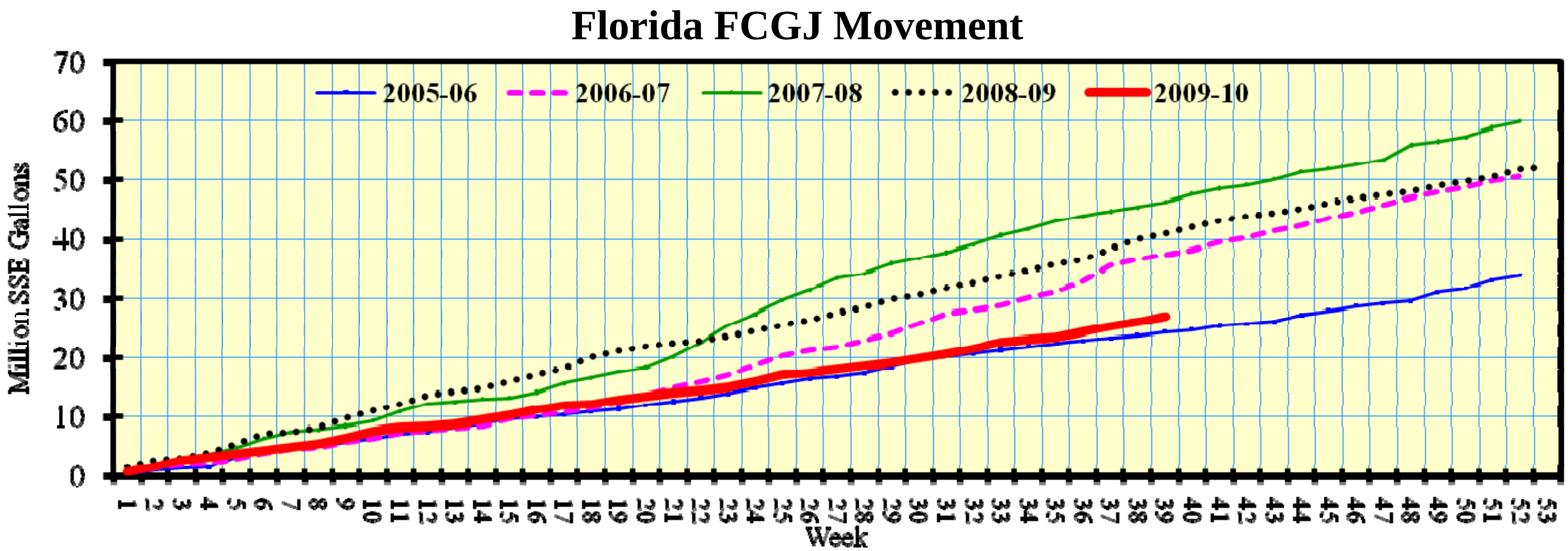
# Florida Grapefruit-Juice Availability, Movement and Inventory

| Item | Season (October-September) | | | Season-to-Date 07/03/10 (FDOC Processor Week 39) | | |
|---|---|---|---|---|---|---|
| | 2008-09 | 2009-10e | Change | 2008-09 | 2009-10 | Change |
| | - million SSE gallons - | | - % - | - million SSE gallons - | | - % - |
| **Beginning Inventory** | **59.3** | **45.7** | **-23.0** | **59.3** | **45.7** | **-23.0** |
| **Pack from Fruit**[a] | **68.0** | **61.0** | **-10.3** | **68.2** | **58.8** | **-13.8** |
| **Availability** | **127.3** | **106.7** | **-16.2** | **127.5** | **104.1** | **-18.3** |
| **Movement** | **81.6** | **56.0** | **-31.4** | **63.9** | **43.5** | **-31.9** |
| FCGJ | 52.3 | 33.8 | -35.4 | 40.8 | 26.7 | -34.5 |
| NFC[b] | 29.3 | 22.1 | -24.4 | 23.1 | 16.8 | -27.1 |
| **Ending Inventory** | **45.7** | **50.7** | **+11.0** | **63.6** | **60.6** | **-4.7** |
| | - - weeks supply - - | | - % - | - - weeks supply - - | | - % - |
| **Carryover – STD**[c] | **29.7** | **47.1** | **+58.8** | **38.8** | **54.3** | **+39.9** |
| **Carryover – 13 Weeks**[d] | | | | **36.2** | **52.1** | **+43.8** |
| **Carryover – 3 Years**[e] | | | | **41.6** | **39.6** | **-4.7** |

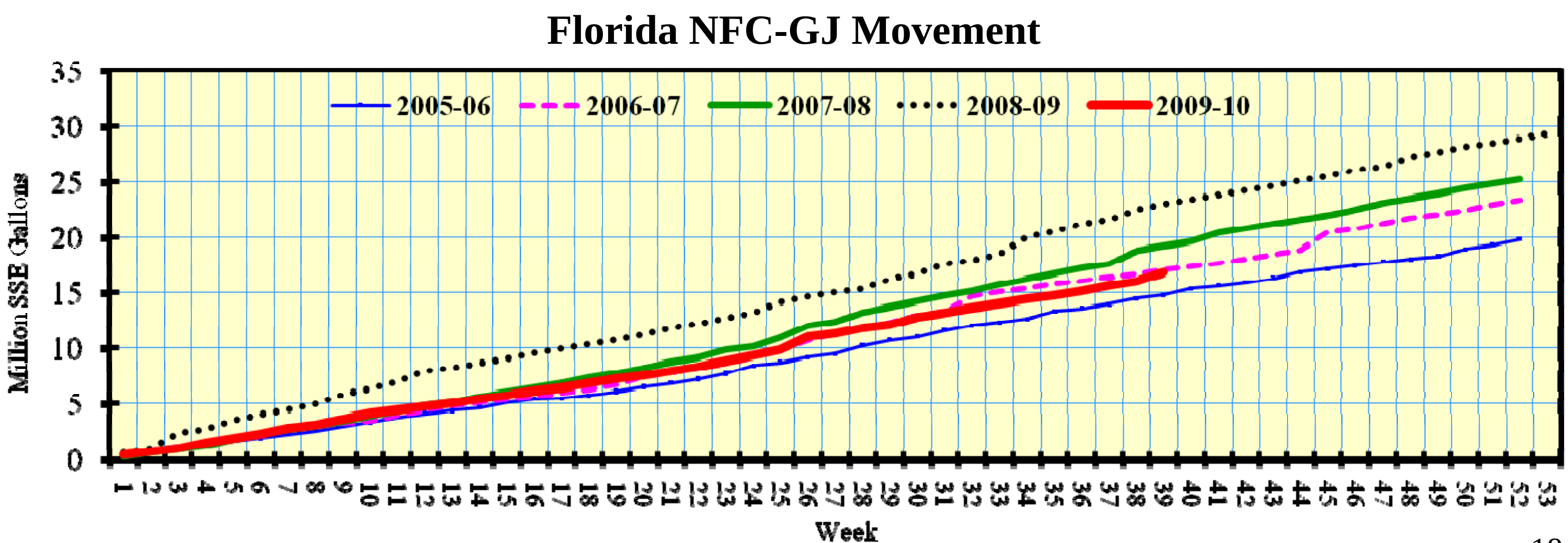
[a]Includes domestic receipts by members of non-Florida product, Florida product received by members from non-members, foreign imports, net loss or gain during reprocessing and adjustments.
[b]Excludes movement of reconstituted chilled grapefruit juice and evaporated CGJ.
[c]Season-to-date weeks supply based on season-to-date movement.
[d]Season-to-date weeks supply based on last 13-week movement.
[e]Season-to-date weeks supply based on last 3-year movement.

# Florida Grapefruit-Juice Movement





Florida FCGJ Movement
2005-06
2006-07
2007-08
2008-09
2009-10
Million SSE Gallons
Week

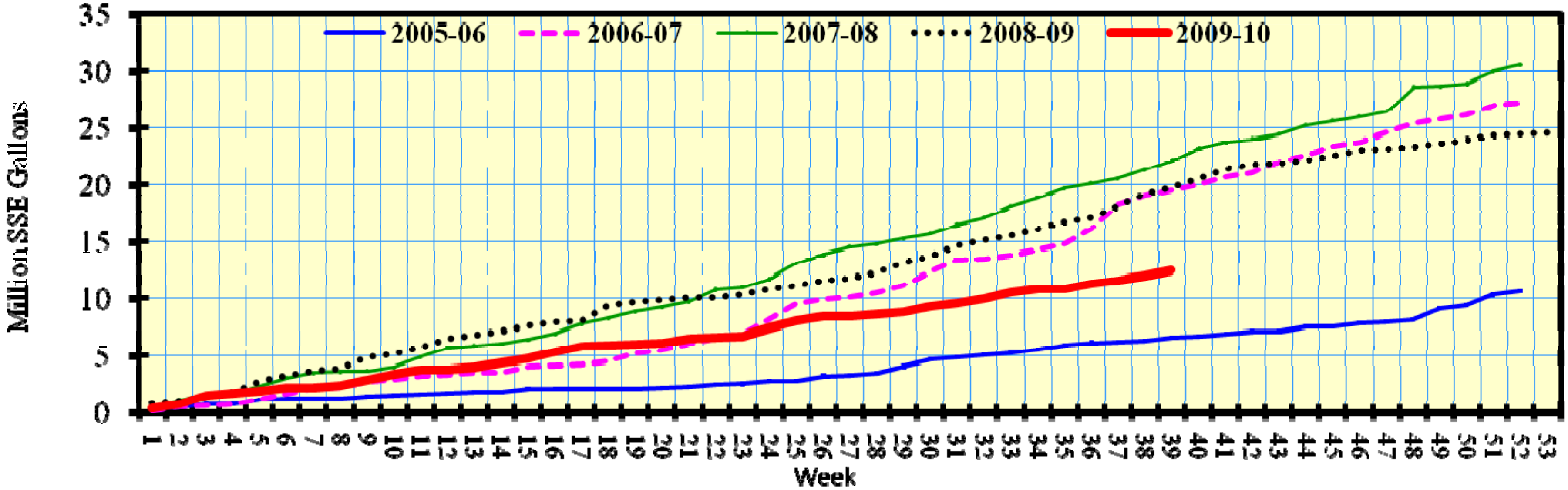
Florida NFC-GJ Movement
2005-06
2006-07
2007-08
2008-09
2009-10
Million SSE Gallons
Week

# U.S. Grapefruit-Juice Exports[a,b]

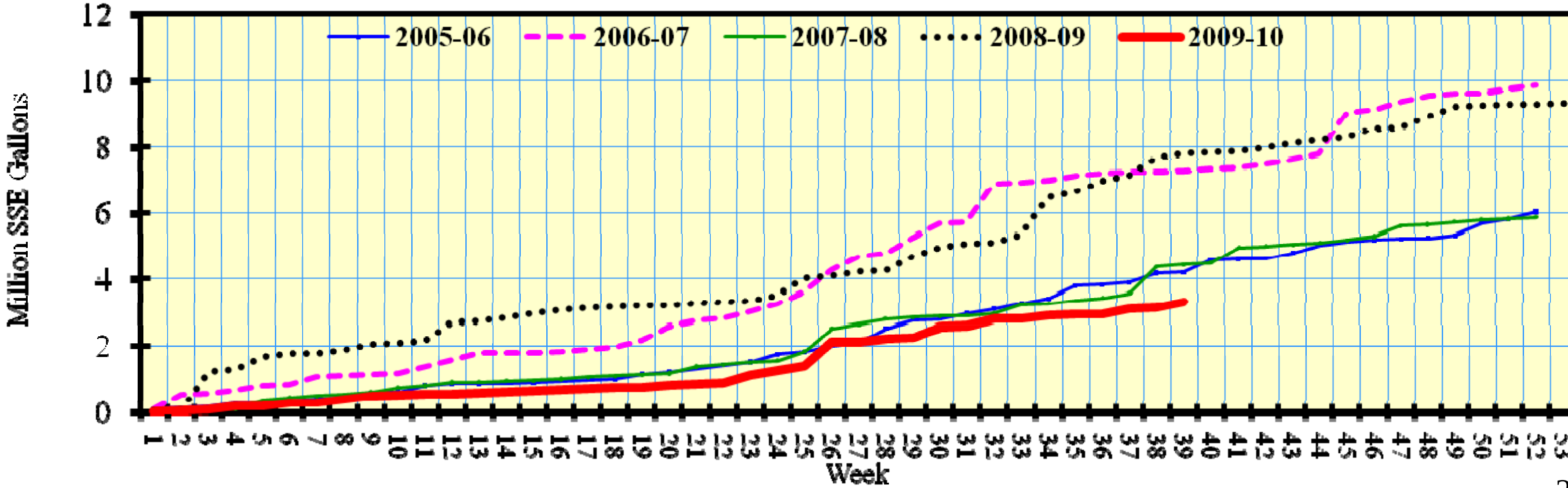
| Country | Season-to-Date (October-May) | | |
|---|---|---|---|
| | 2008-09 | 2009-10 | Change |
| | - - - million SSE gallons - - - | | - % - |
| **Canada** | **1.79** | **1.44** | **-19.6** |
| **Europe** | **5.96** | **2.37** | **-60.2** |
| **Japan** | **1.72** | **2.20** | **+27.9** |
| **Other** | **1.47** | **.62** | **-57.8** |
| **TOTAL** | **10.94** | **6.63** | **-39.4** |

[a]FDOC estimates.
[b]FDOC Processor exports of GJ for the 2009-10 season were down 42.7%, season-to-date through 07/03/10.
SOURCE: U.S. Department of Commerce.

## Florida FCGJ Export Movement




## Florida NFC-GJ Export Movement



# U.S. Retail Grapefruit-Juice Sales

| Item | Volume | | | Price | | |
|---|---|---|---|---|---|---|
| | 2008-09p | 2009-10f | Change | 2008-09p | 2009-10f | Change |
| | - million SSE gallons - | | - % - | - - $/SSE gallon - - | | - % - |
| **SEASON:** | | | | | | |
| **Refrigerated** | **13.00** | **12.79** | **-1.6** | **6.60** | **6.53** | **-1.0** |
| NFC | 12.27 | 12.15 | -1.0 | 6.74 | 6.63 | -1.6 |
| RECON | .73 | .64 | -12.2 | 4.27 | 4.68 | +9.7 |
| **FCGJ** | **.77** | **.42** | **-45.0** | **4.26** | **4.47** | **+4.9** |
| **Shelf Stable** | **7.16** | **6.63** | **-7.4** | **6.04** | **6.08** | **+.6** |
| **TOTAL** | **20.94** | **19.85** | **-5.2** | **6.32** | **6.34** | **+.3** |
| **SEASON-TO-DATE: (through 06/12/10)[a]** | | | | | | |
| **Refrigerated** | **9.20** | **9.11** | **-1.0** | **6.61** | **6.52** | **-1.3** |
| NFC | 8.68 | 8.65 | -.4 | 6.75 | 6.62 | -1.9 |
| RECON | .52 | .46 | -10.7 | 4.25 | 4.66 | +9.8 |
| **FCGJ** | **.59** | **.32** | **-45.9** | **4.24** | **4.45** | **+5.0** |
| **Shelf Stable** | **5.14** | **4.70** | **-8.5** | **5.99** | **6.07** | **+1.3** |
| **TOTAL** | **14.93** | **14.13** | **-5.3** | **6.30** | **6.33** | **+.4** |

[a]SEASON-TO-DATE: Actual for 2008-09 and preliminary for 2009-10.
SOURCE: Nielsen—Data are for U.S. grocery stores 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 through 06/27/10

| Shipments/ Variety | 2008-09 STD | 2009-10 STD | Change |
|---|---|---|---|
| | - - - - - 1,000 4/5-bu. cartons - - - - - | | - - % - - |
| **Domestic & Canadian – All** | **7,133** | **7,265** | **+1.9** |
| **Offshore Exports – All** | **10,220** | **10,168** | **-.5** |
| **TOTAL - All** | **17,353** | **17,433** | **+.5** |

SOURCE: Citrus Administrative Committee, preliminary; last two weeks of the 2009-10 season contain estimates.

# Florida Fresh Grapefruit Domestic and Export Certified Shipments, Season-to-Date through 06/27/10

| Country | 2008-09 STD | 2009-10 STD | Change |
|---|---|---|---|
| | - thousand cartons - | | - % - |
| United States | 6,044 | 6,094 | +.8 |
| Canada | 1,088 | 1,150 | +5.7 |
| Europe | 3,924 | 3,455 | -11.9 |
| Japan | 6,036 | 6,277 | +4.0 |
| Other | 260 | 430 | +65.4 |
| TOTAL | 17,352 | 17,406 | +.3 |

SOURCE: Florida Department of Citrus.

# Florida Fresh Grapefruit Domestic FOB Prices
## Season-to-Date through 06/13/10

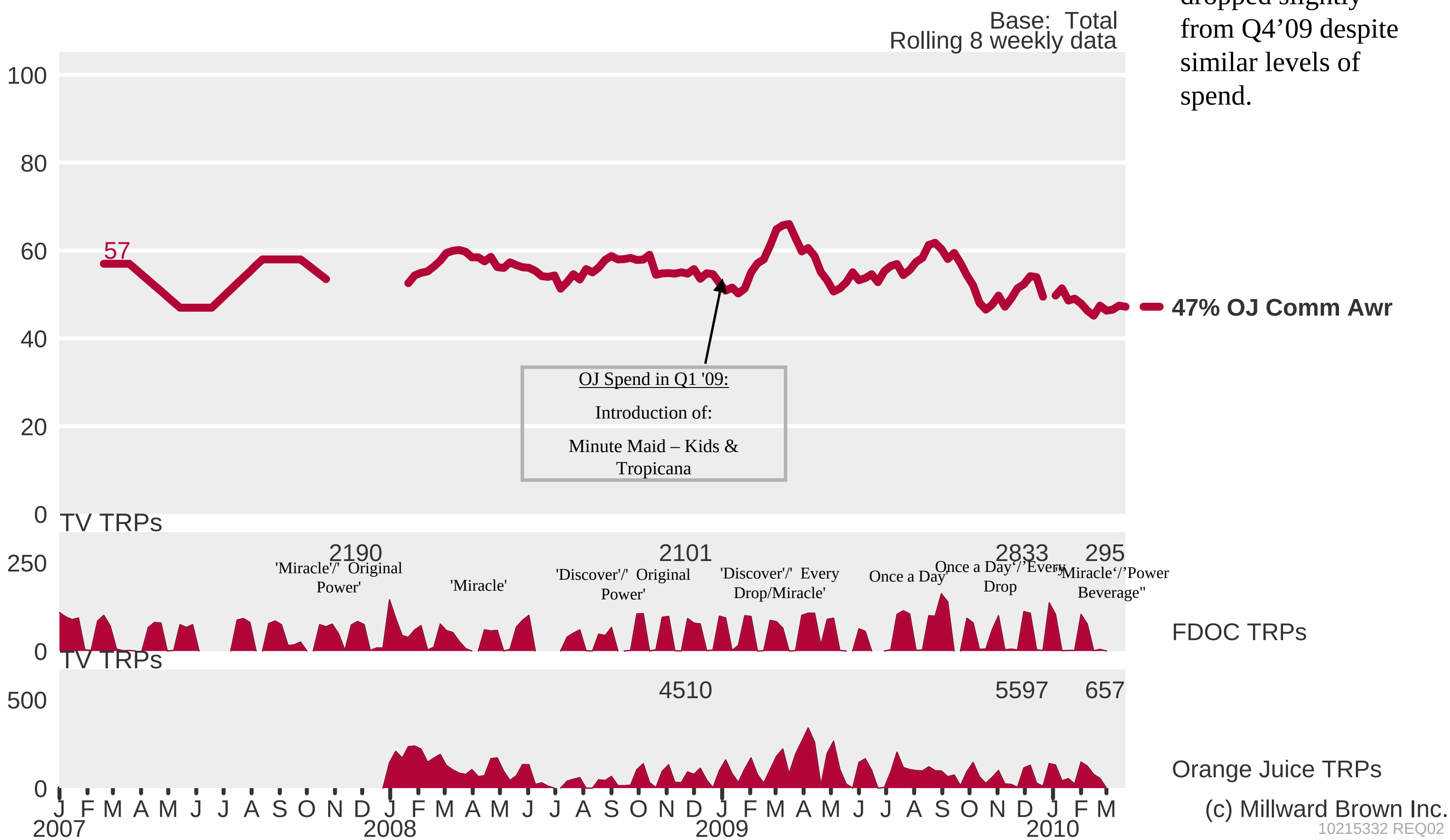
| Variety | FOB Price | | |
|---|---|---|---|
| | 2008-09 STD | 2009-10 STD | Change |
| | - - - - - - - $/carton- - - - - - - | | - - % - - |
| **TOTAL** | | | |
| White | 9.26 | 13.05 | +40.9 |
| Colored | 9.40 | 11.78 | +25.3 |

SOURCE: Citrus Administrative Committee.

# Foreign Exchange Rates Per $US

| Date | Euro | Real | Yen |
|---|---|---|---|
| **ANNUAL** | | | |
| 2006 | 0.79703 | 2.17995 | 116.33664 |
| 2007 | 0.73082 | 1.95159 | 117.81453 |
| 2008 | 0.68341 | 1.84021 | 103.46616 |
| 2009 | 0.71916 | 2.00847 | 93.61672 |
| 2009 (thru 07/15/09) | 0.74745 | 2.19052 | 95.43668 |
| 2010 (thru 07/15/10) | 0.75722 | 1.80303 | 91.21428 |
| % Change | +1.3 | -17.7 | -4.4 |
| **WEEK ENDING 07/15/10** | | | |
| 2009 | 0.71736 | 2.00567 | 92.95834 |
| 2010 | 0.79076 | 1.76470 | 88.56773 |
| % Change | +10.2 | -12.0 | -4.7 |

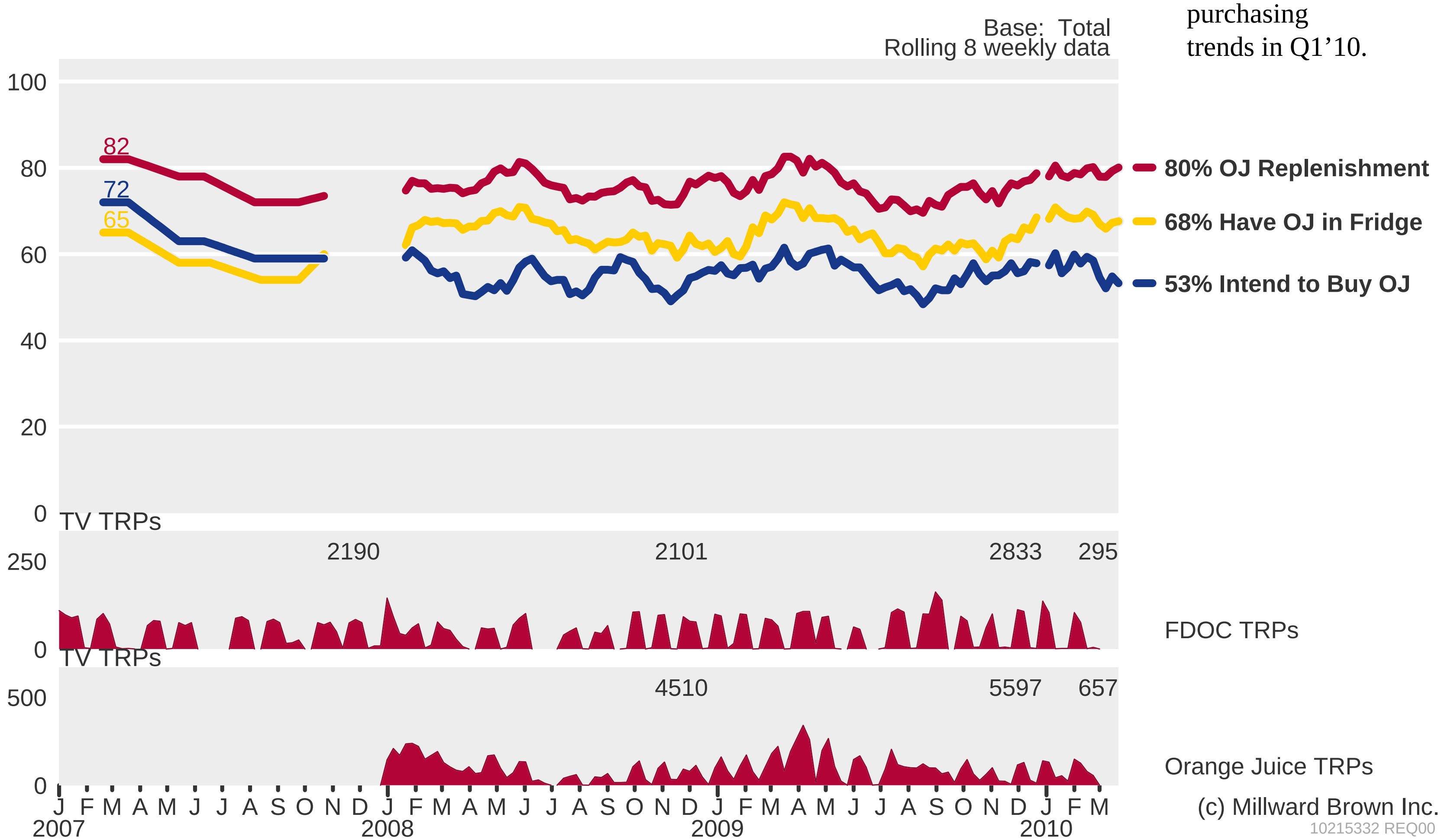
# Total Communication Awareness




Awareness has dropped slightly from Q4'09 despite similar levels of spend.

Q10. Have you seen, heard or read anything lately about Orange juice anywhere recently?
Orange Juice TRPs include FDOC, Tropicana, Minute Maid, Simply Orange, Florida Natural.

# Purchase Trends




There has been no significant change in purchasing trends in Q1'10.

* Intend to purchase or/and have OJ in the fridge

Orange Juice TRPs include FDOC, Tropicana, Minute Maid, Simply Orange, Florida Natural.

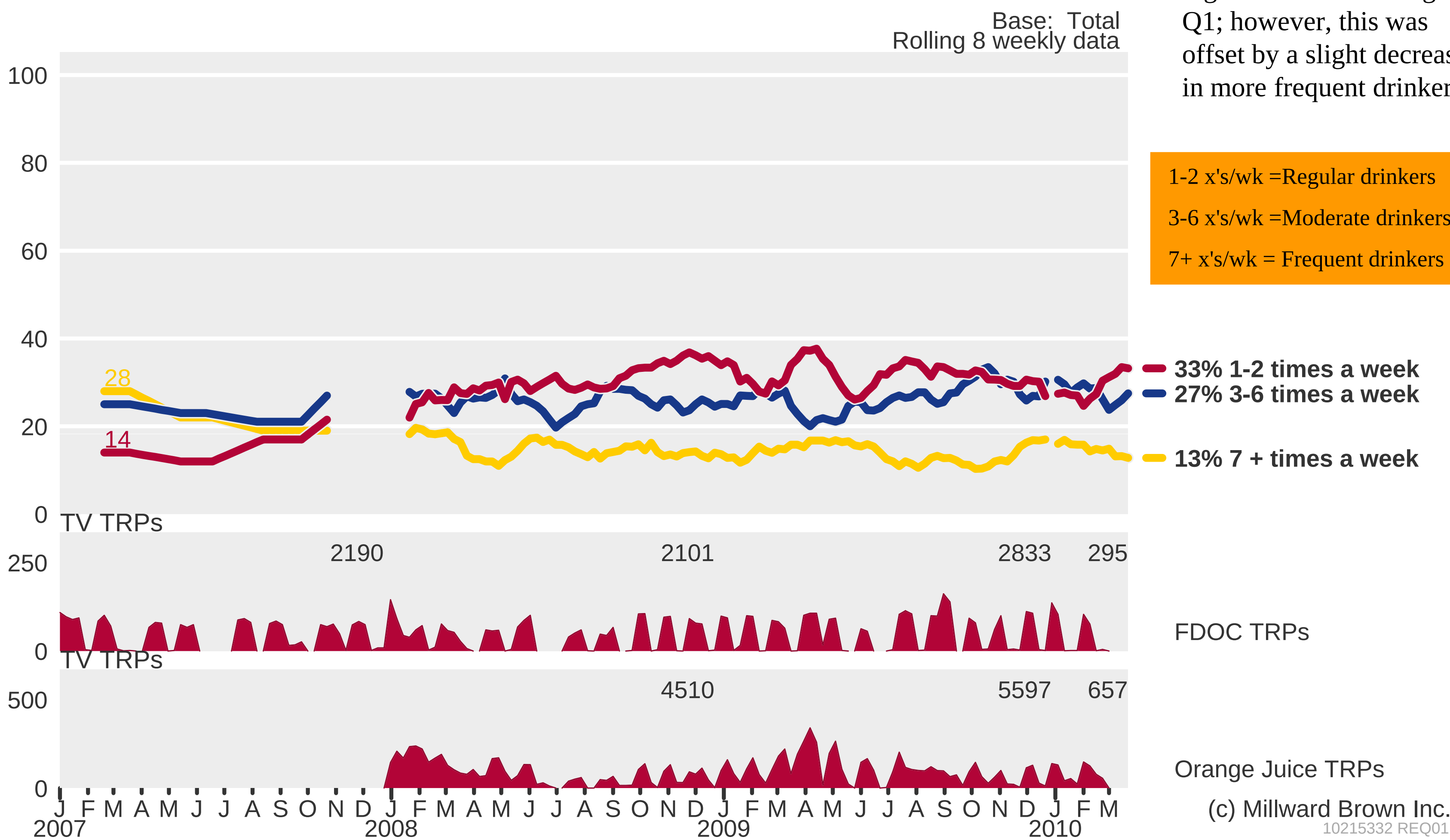
# Consumption

There was a small increase in the number of regular drinkers during Q1; however, this was offset by a slight decrease in more frequent drinkers.

1-2 x's/wk =Regular drinkers

3-6 x's/wk =Moderate drinkers

7+ x's/wk = Frequent drinkers

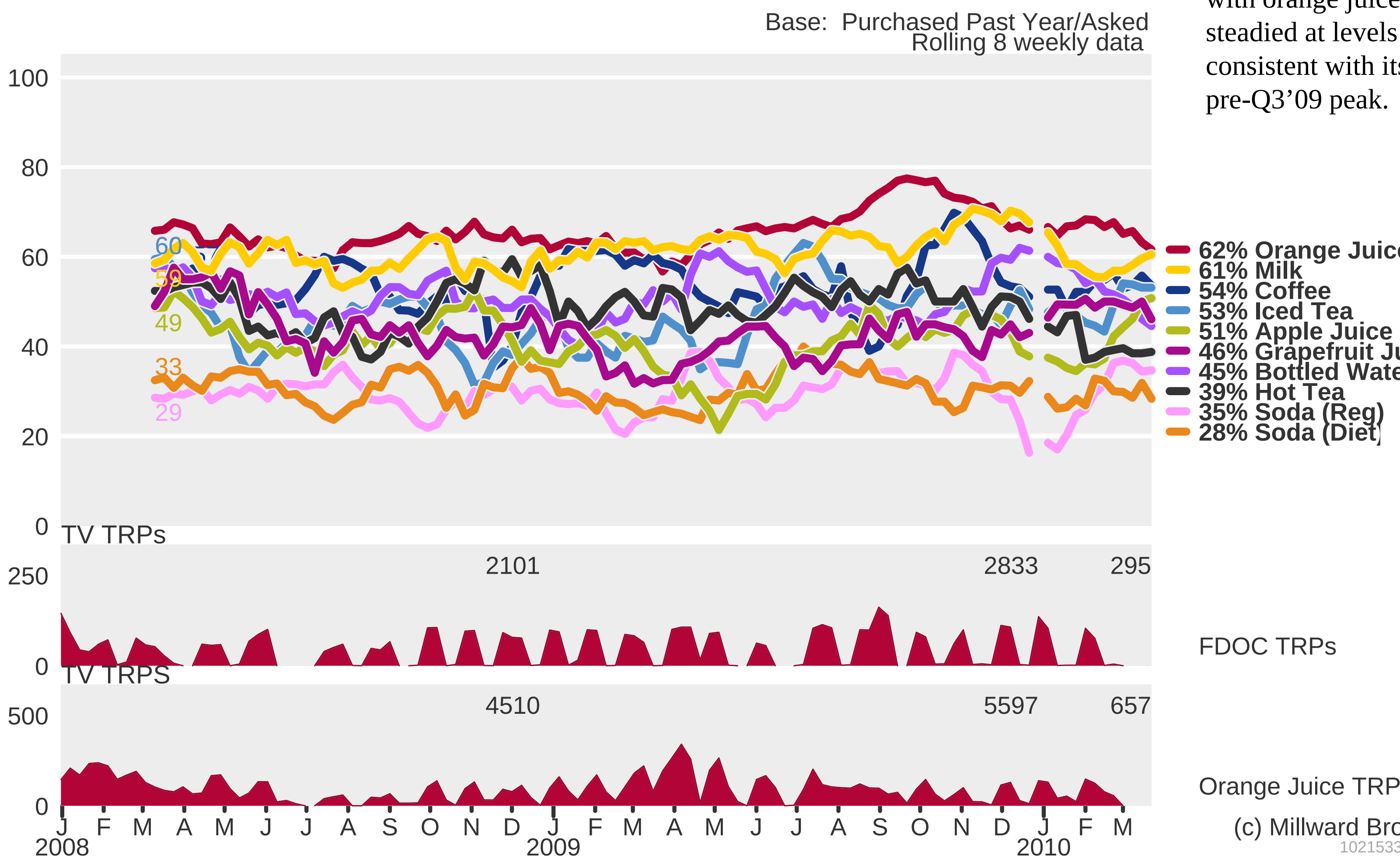



Q1: How often would you say you consume the following beverages?

Orange Juice TRPs include FDOC, Tropicana, Minute Maid, Simply Orange, Florida Natural.

# Satisfaction

During the 1st quarter, satisfaction with orange juice steadied at levels consistent with its pre-Q3'09 peak.

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Q22: Overall, how satisfied are you with each of the following beverages?

Orange Juice TRPs include FDOC, Tropicana, Minute maid, Simply Orange, Florida Natural.