

Florida Orange Juice Outlook, Research and Marketing

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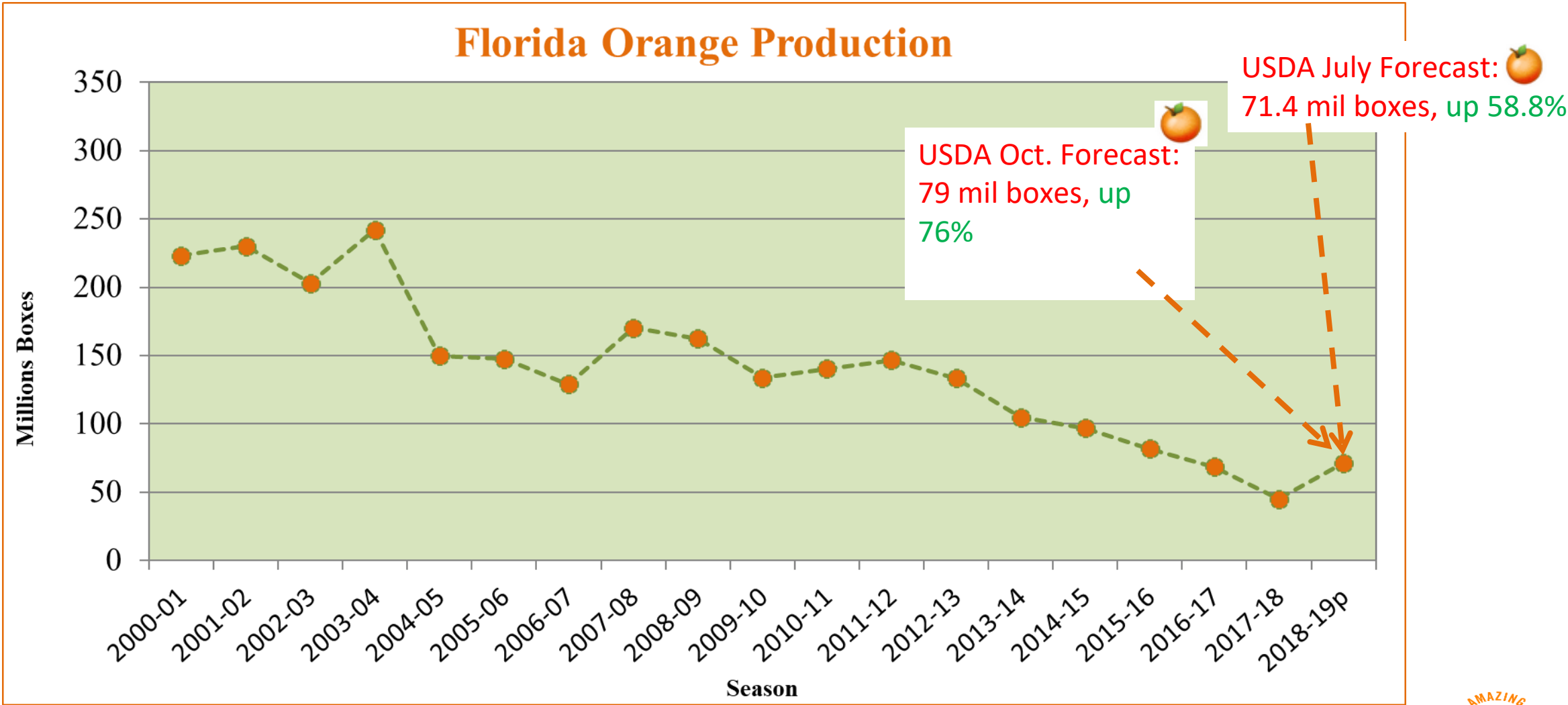
Overview

- (1) Trends influencing domestic orange juice availability;
- (2) Current OJ retail sales trends and consumer demand;
- (3) Overview of current scientific research on OJ nutrition and communication to consumers.

Florida Processed Orange Trends



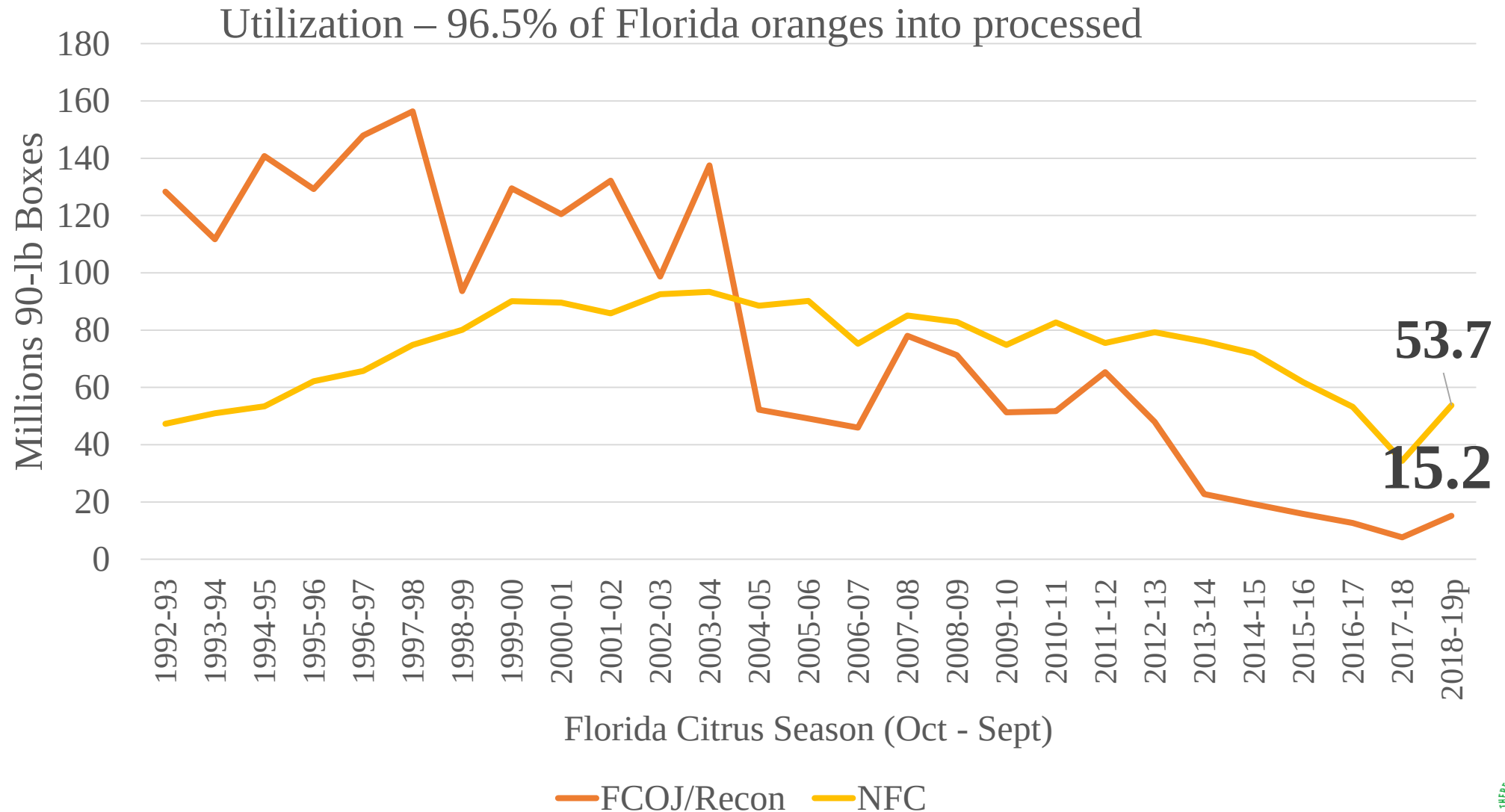
USDA Citrus Crop Forecast – Oct. '18 to July '19



Citrus forecast Data Source: USDA



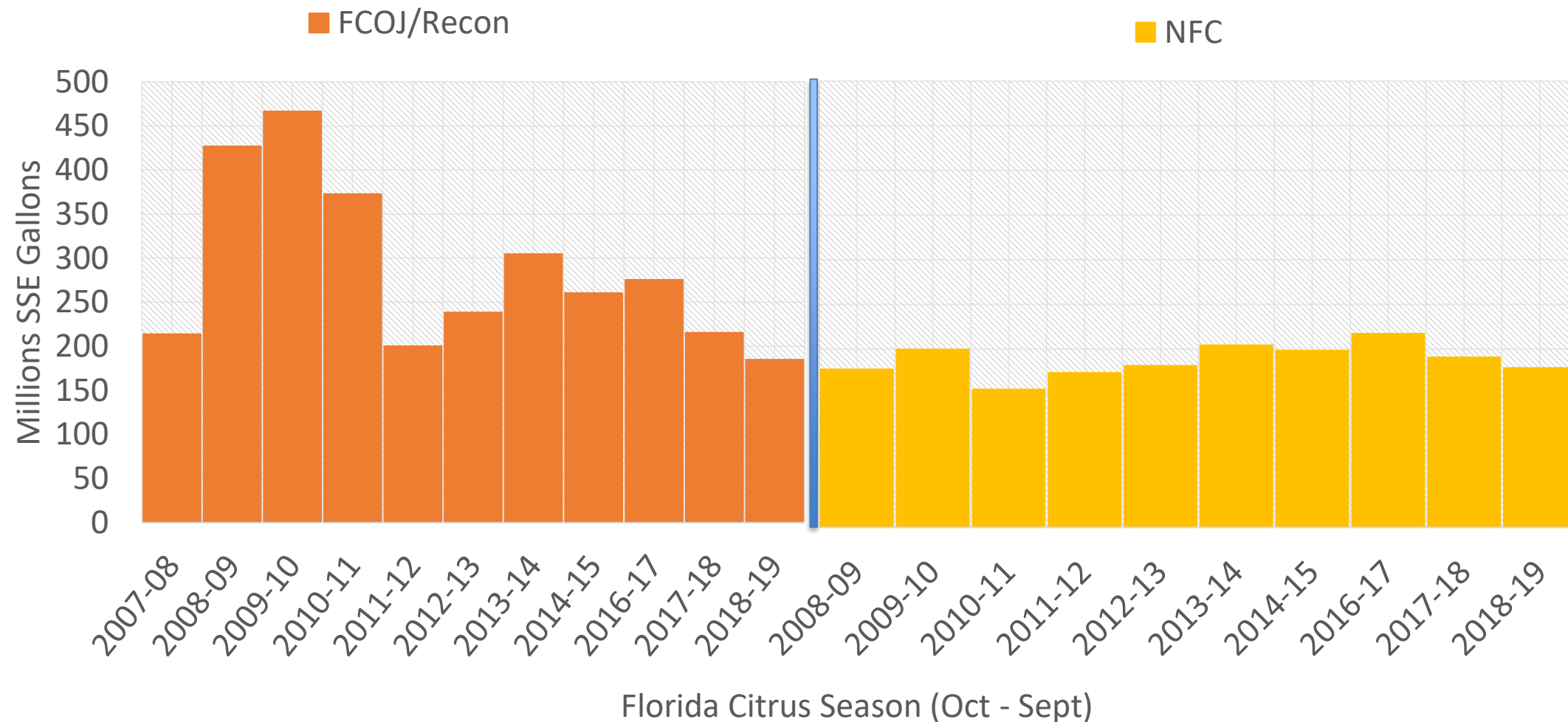
Florida Processed Orange Utilization



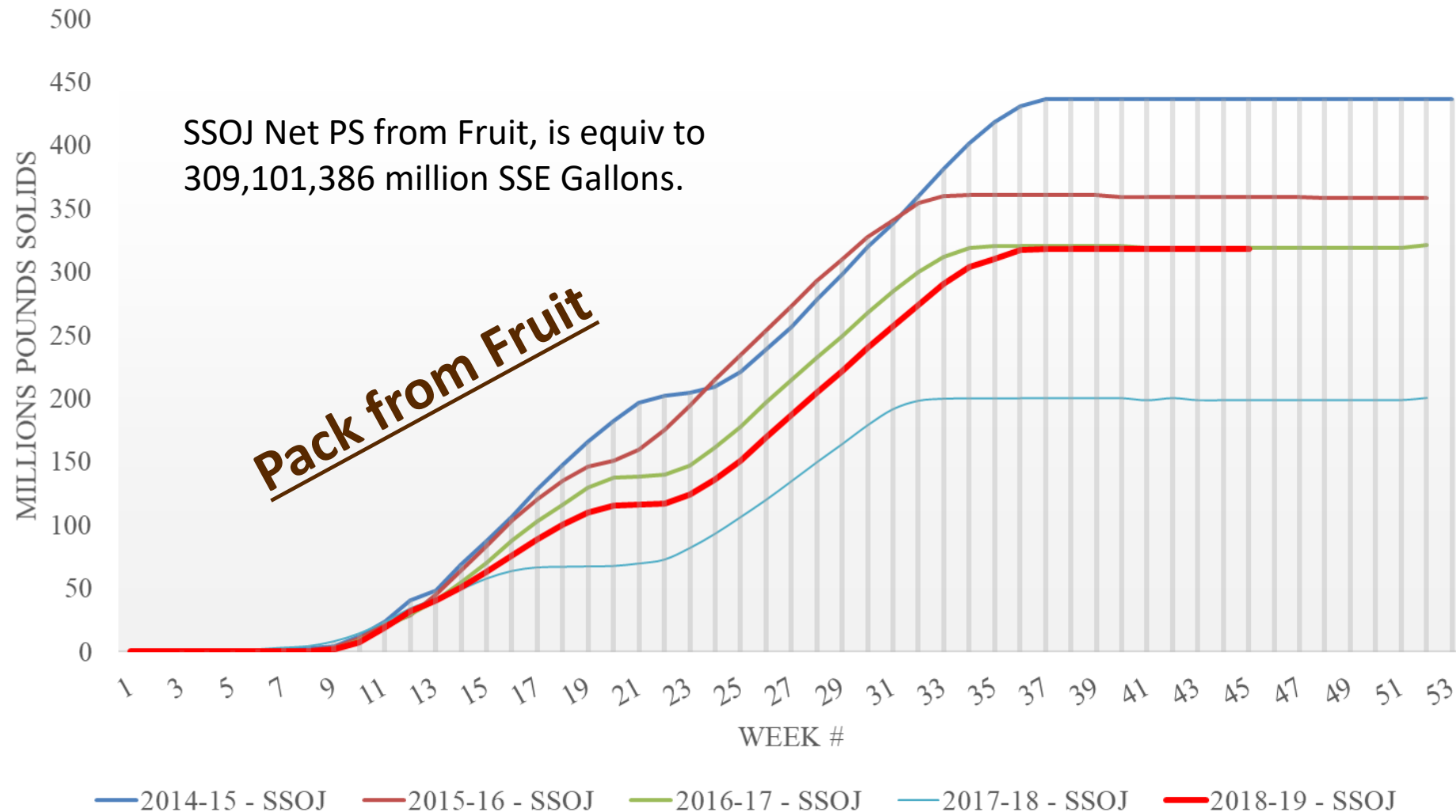
Florida OJ Availability

- Beginning inventory
- Pack from Fruit: production, juice yields
 - Estimated pack from fruit declined since USDA October forecast by 32 million SSE gallons
- Net Imports
- Movement
- Ending Inventory
- External Trends*

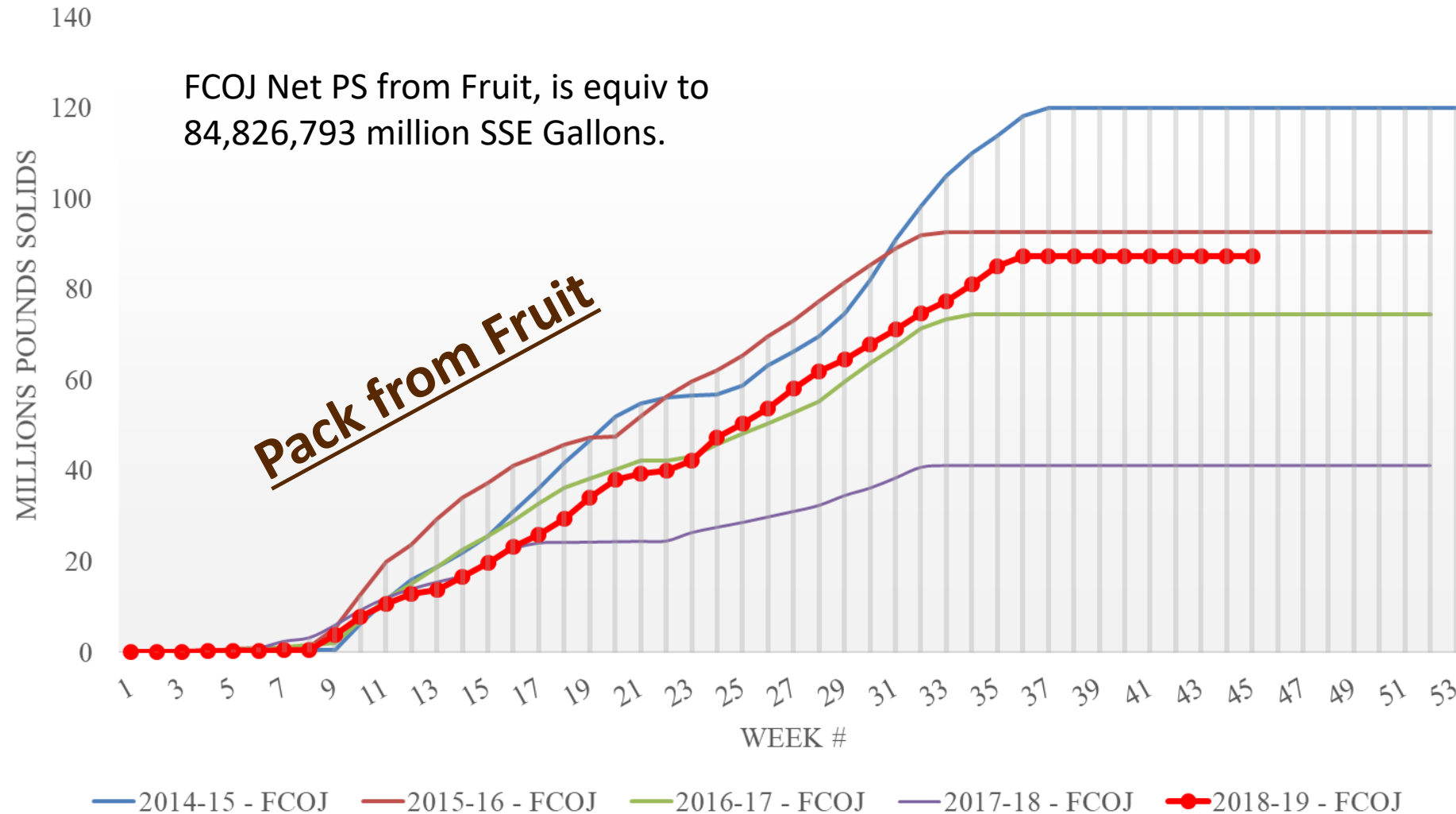
Beginning Inventory – FCOJ/Recon ↓14%, NFC ↓6% YOY



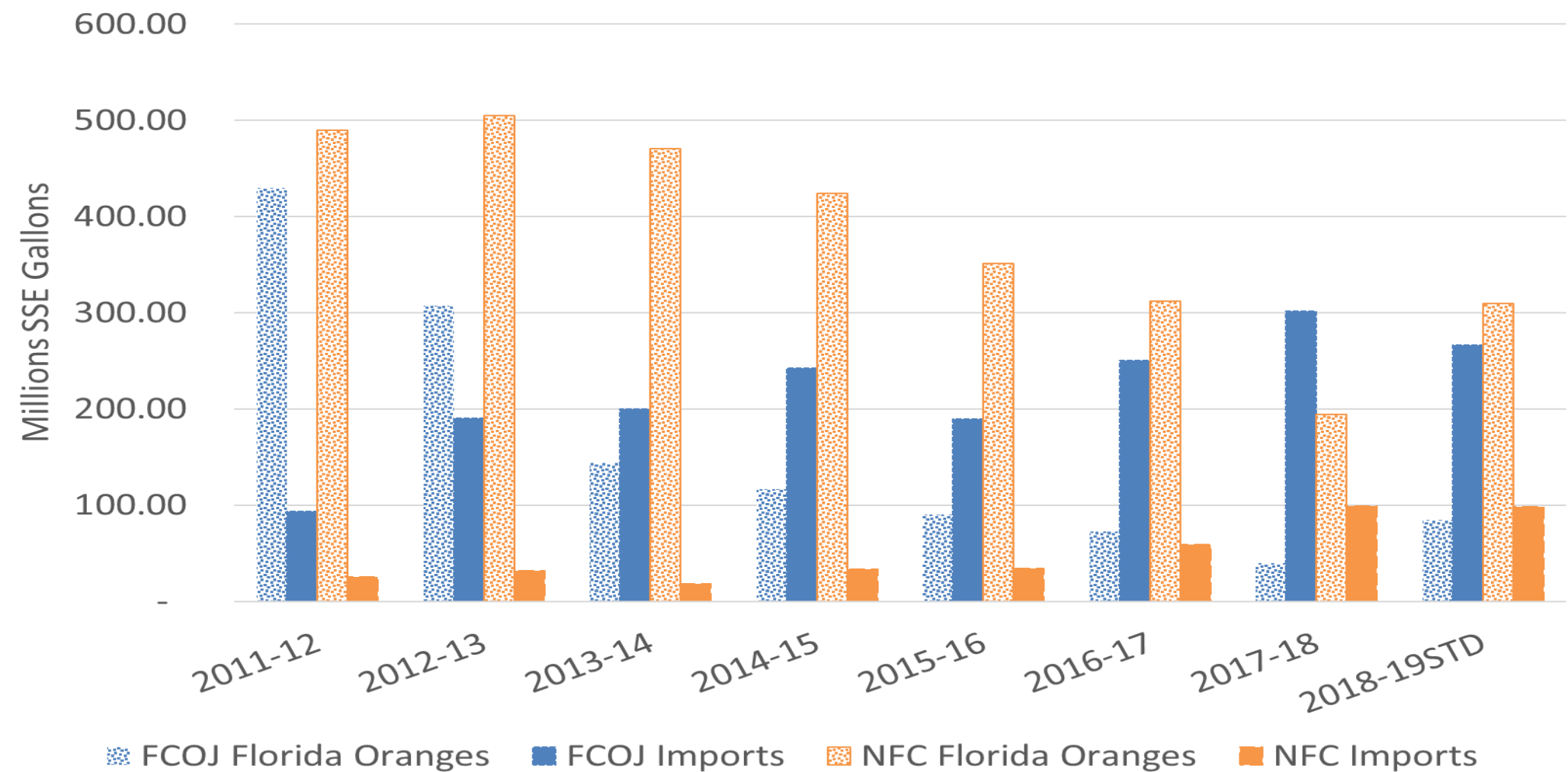
NFC from Florida oranges – up 59% YOY



FCOJ/Recon from Florida oranges – up 112% YOY



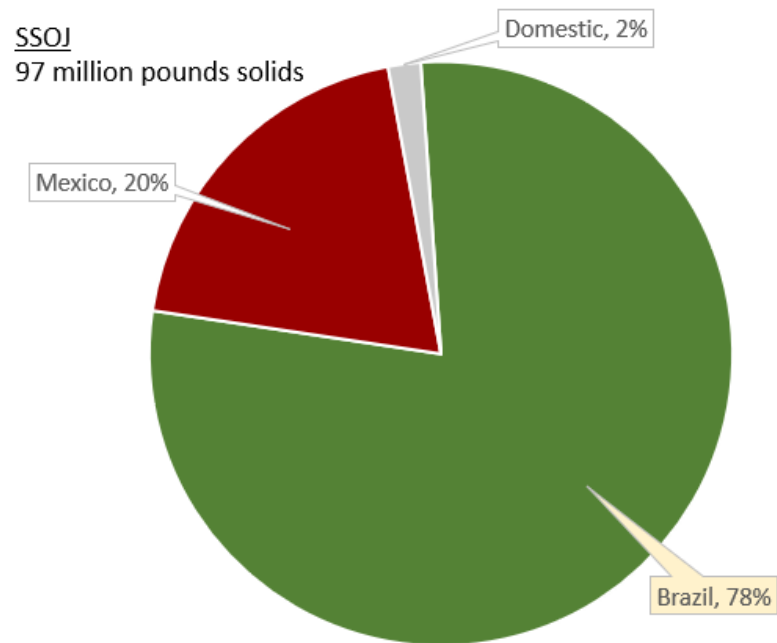
FL Processor OJ Imports* and Juice from FL fruit comparison



*Includes Domestic Receipts; 2018-19STD Season-to-date through August 10, 2019

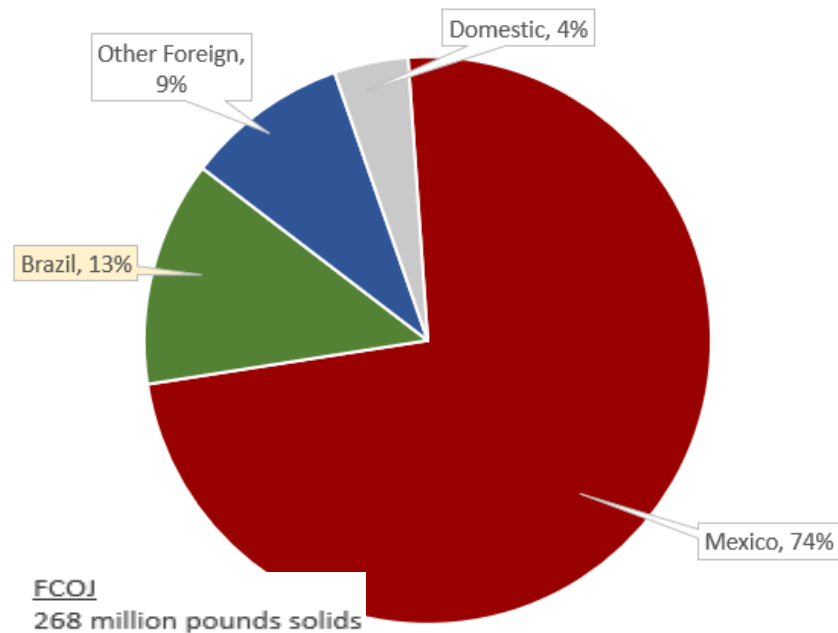


Origin of Florida Processor Imports

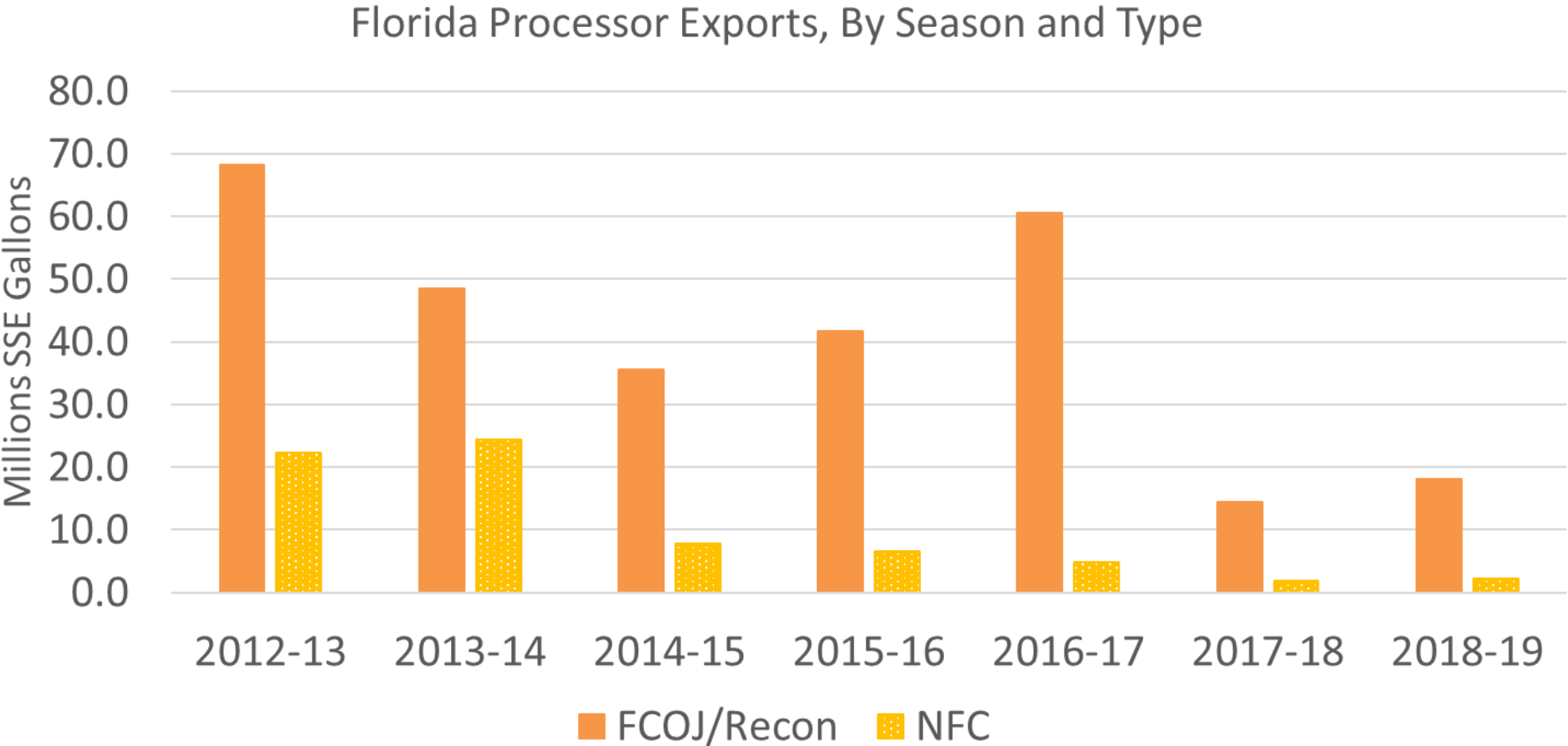


NFC Imports/Domestic Receipts up by 5% through August 24, 2019

FCOJ Imports/Domestic Receipts down by -9% through August 17, 2019



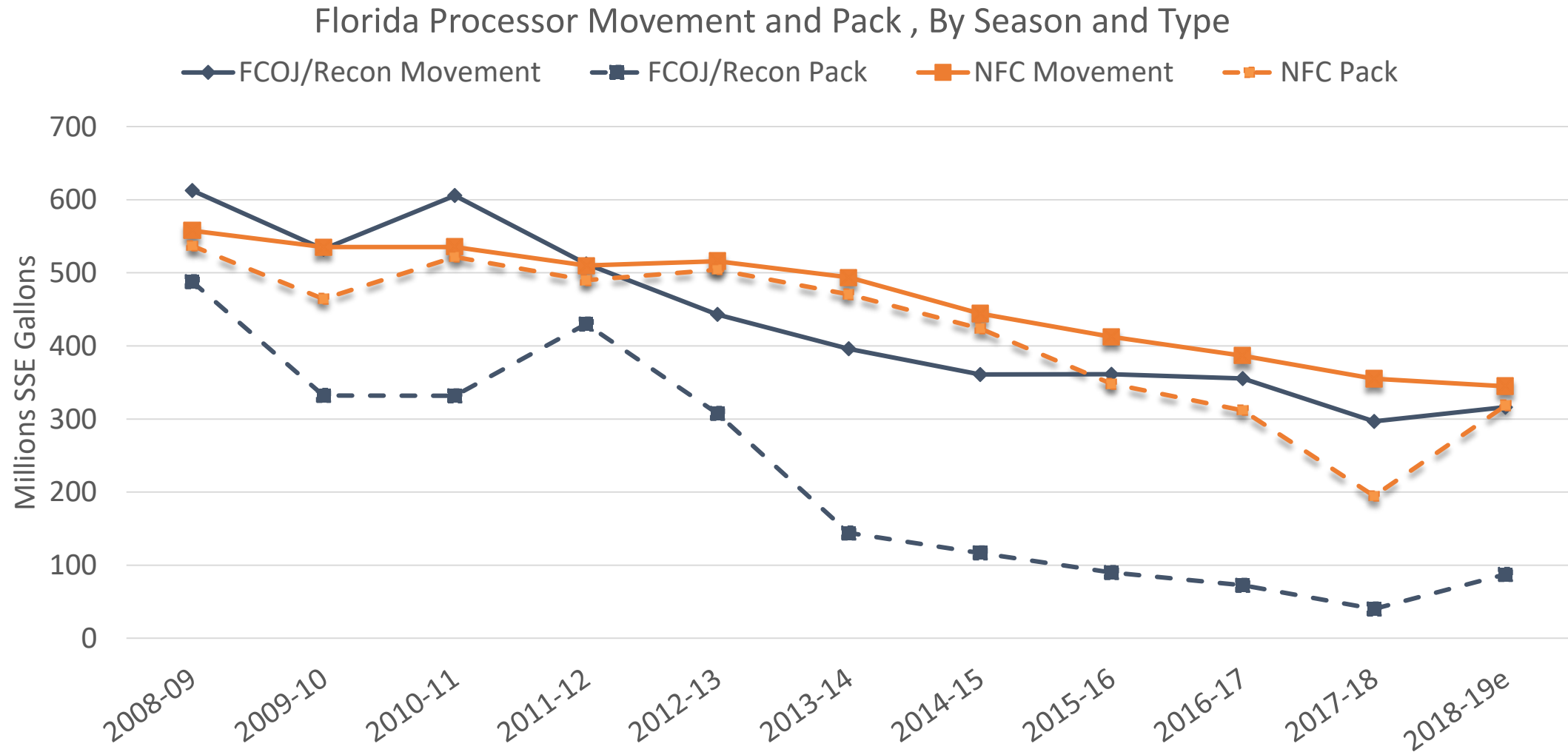
FL Processor OJ Exports*



***2018-19 Season-to-date through August 24, 2019**

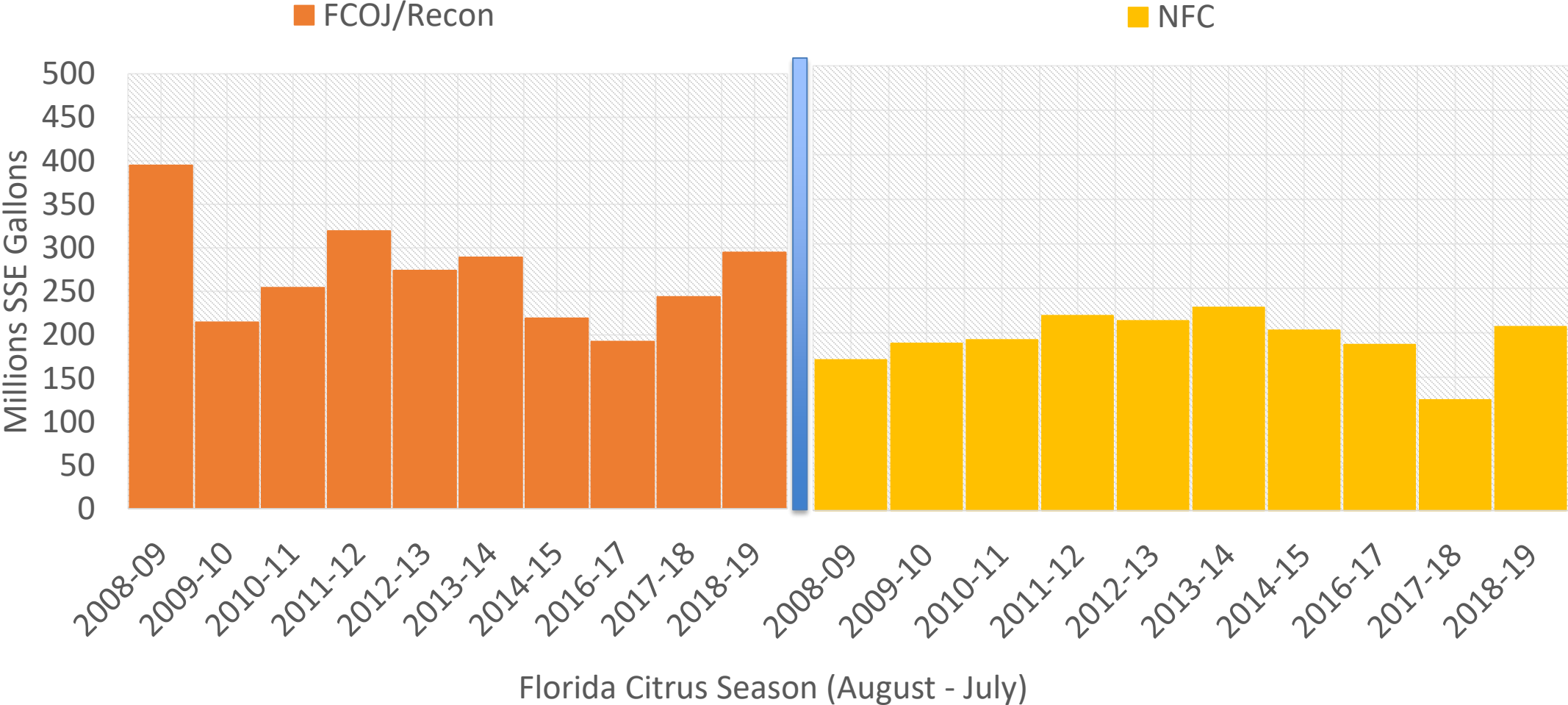


Florida FCOJ/Recon and NFC Movement –



Florida Processor Inventory - FCOJ ↑, SSOJ ↑

Current Weeks Supply		
	8/24/2018	8/24/2019
FCOJ	44	53
SSOJ	21	35
Combined	32	44

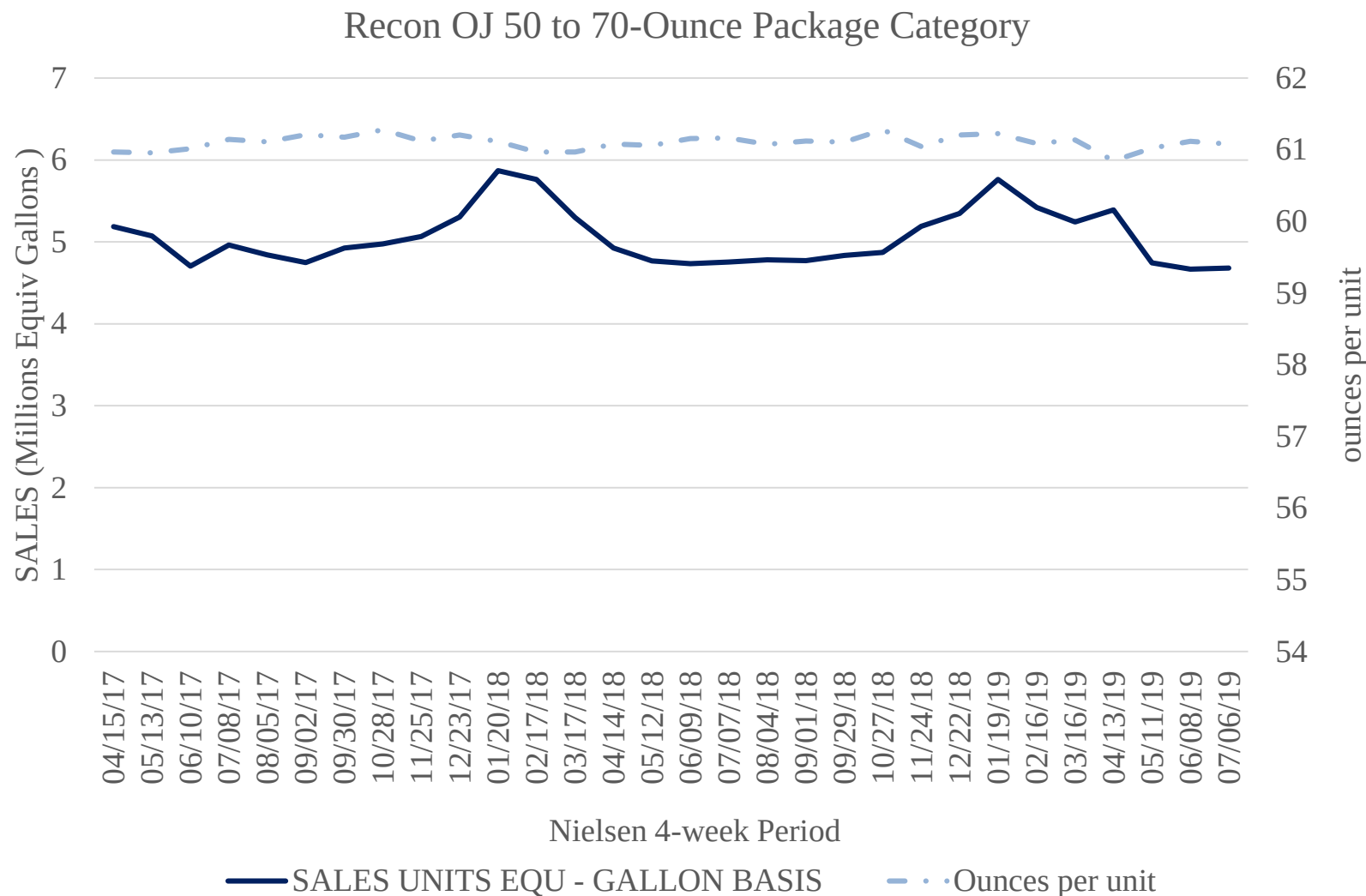


Historical Beginning OJ Inventories (measured in Weeks Supply)

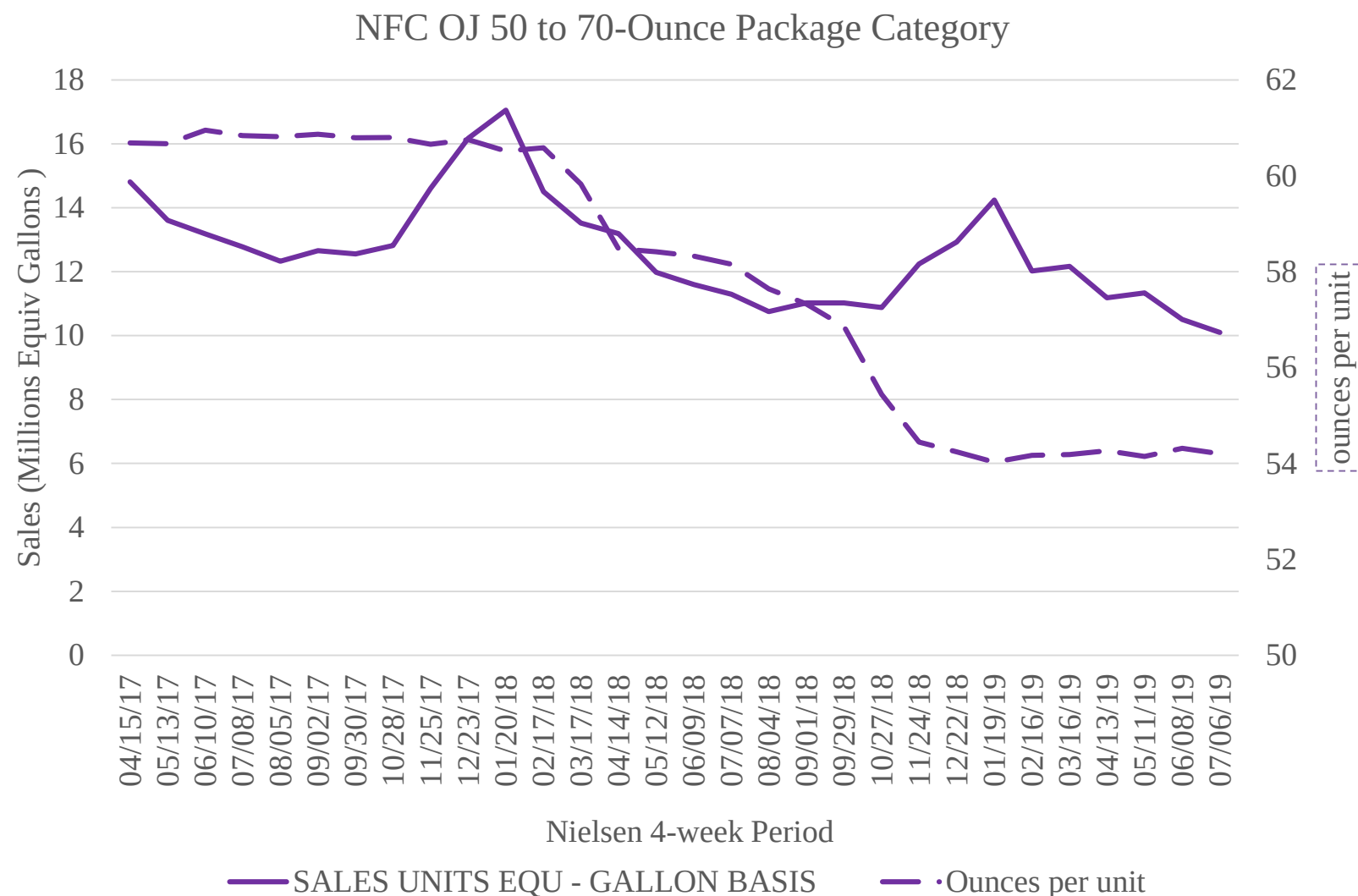
Season	Week #	FCOJ	SSOJ
2011-12	1	17.9	17.7
2012-13	1	25.1	19.0
2013-14	1	36.4	21.5
2014-15	1	35.0	21.9
2015-16	1	41.9	27.6
2016-17	1	30.6	24.8
2017-18	1	27.3	24.4
2018-19	1	41.5	17.7
2019-20est	1	48-50 weeks	28-30 weeks

***Estimated 2018-19 Beginning Weeks Supply based on current movement/import trends**

Shifting trends in packaging – Recon



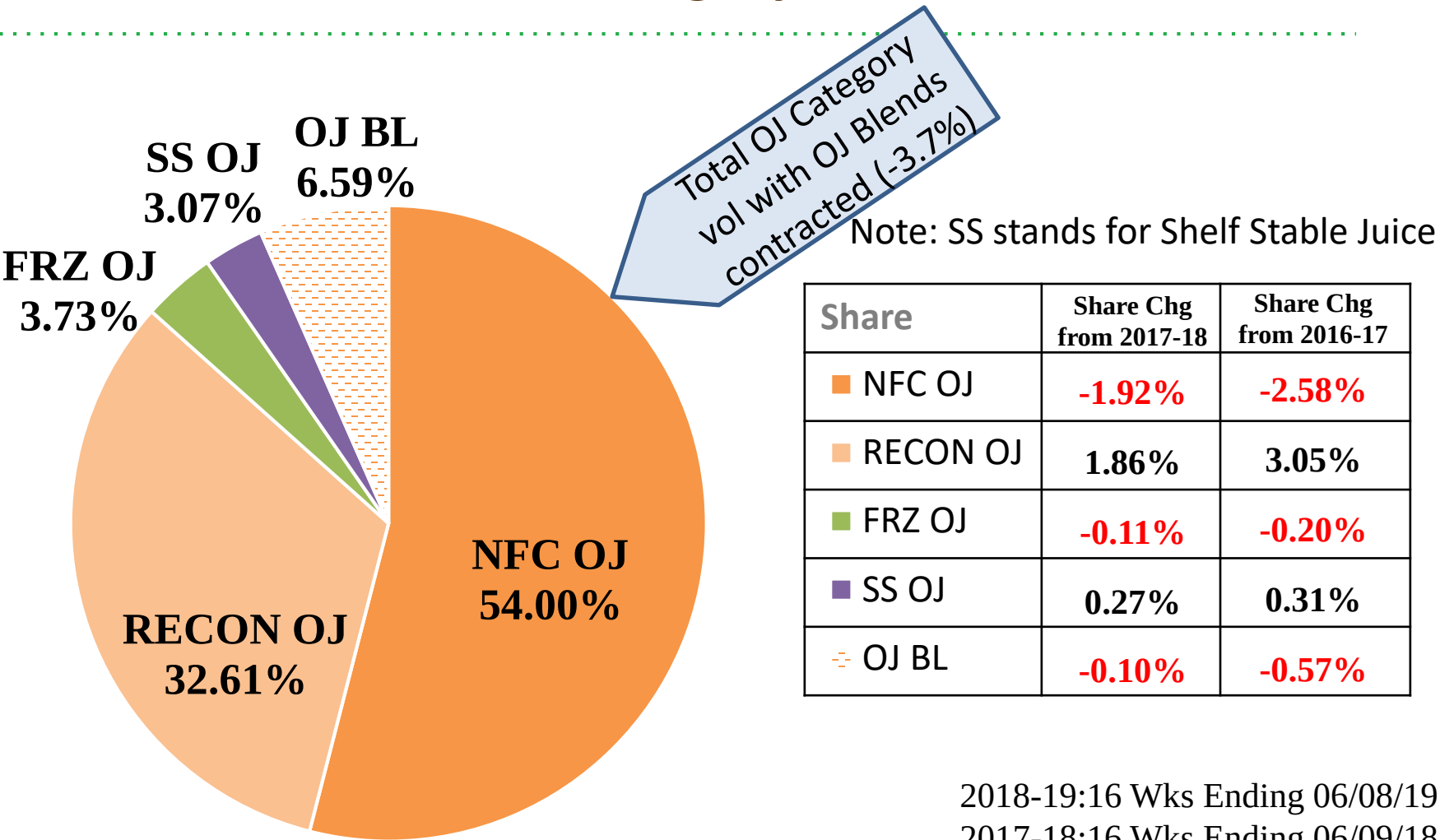
Shifting trends in packaging - NFC



Retail Orange Juice

	Millions Gallons			Millions Dollars			Price per EQ Gallon		
	4 Wks YA	4 Wks	% Chg	4 Wks YA	4 Wks	% Chg	4 Wks YA	4 Wks	% Chg
TL OJ	28.03	26.90	-4.0%	\$ 192.73	\$189.38	-1.7%	\$6.88	\$7.04	2.4%
TL OJ REF NFC	16.27	15.31	-5.9%	\$132.74	\$131.01	-1.3%	\$8.16	\$8.56	4.9%
NFC <11oz	0.17	0.16	-2.6%	\$2.00	\$1.98	-1.0%	\$11.91	\$12.12	1.7%
NFC 11-20oz	0.53	0.51	-2.5%	\$7.86	\$7.96	1.2%	\$14.88	\$15.46	3.9%
NFC 20-50oz	0.14	0.12	-14.4%	\$1.81	\$1.73	-4.6%	\$13.29	\$14.82	11.5%
NFC 50-70oz	10.75	9.78	-9.1%	\$83.30	\$80.84	-3.0%	\$7.75	\$8.27	6.7%
NFC 70-110oz	3.96	4.03	1.8%	\$32.92	\$33.75	2.5%	\$8.32	\$8.37	0.7%
NFC >110oz	0.73	0.71	-2.8%	\$4.85	\$4.76	-1.9%	\$6.64	\$6.70	0.9%
TL OJ REF RECON	9.69	9.63	-0.7%	\$47.36	\$46.67	-1.5%	\$4.89	\$4.85	-0.8%

Displacement of NFC within OJ Category for Recon and Shelf Stable

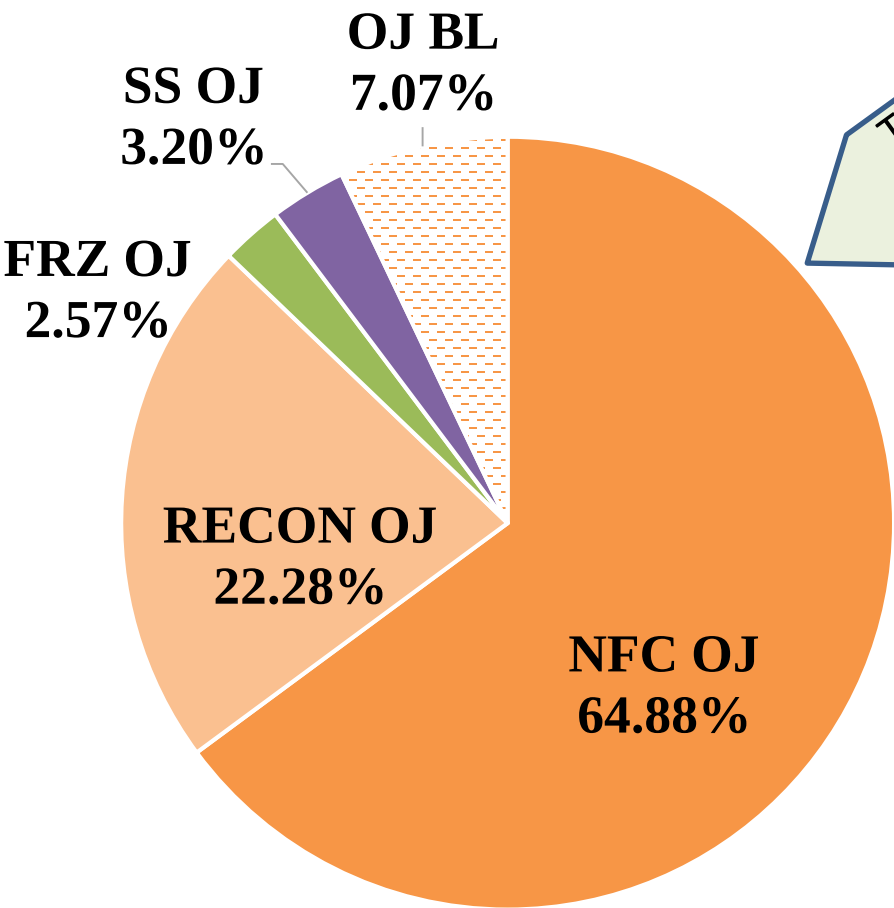


Share of Volume Sales in OJ Category

2018-19:16 Wks Ending 06/08/19
 2017-18:16 Wks Ending 06/09/18
 2016-17:16 Wks Ending 06/10/17



Share of NFC and Recon dollars sales ↑



Note: SS stands for Shelf Stable Juice

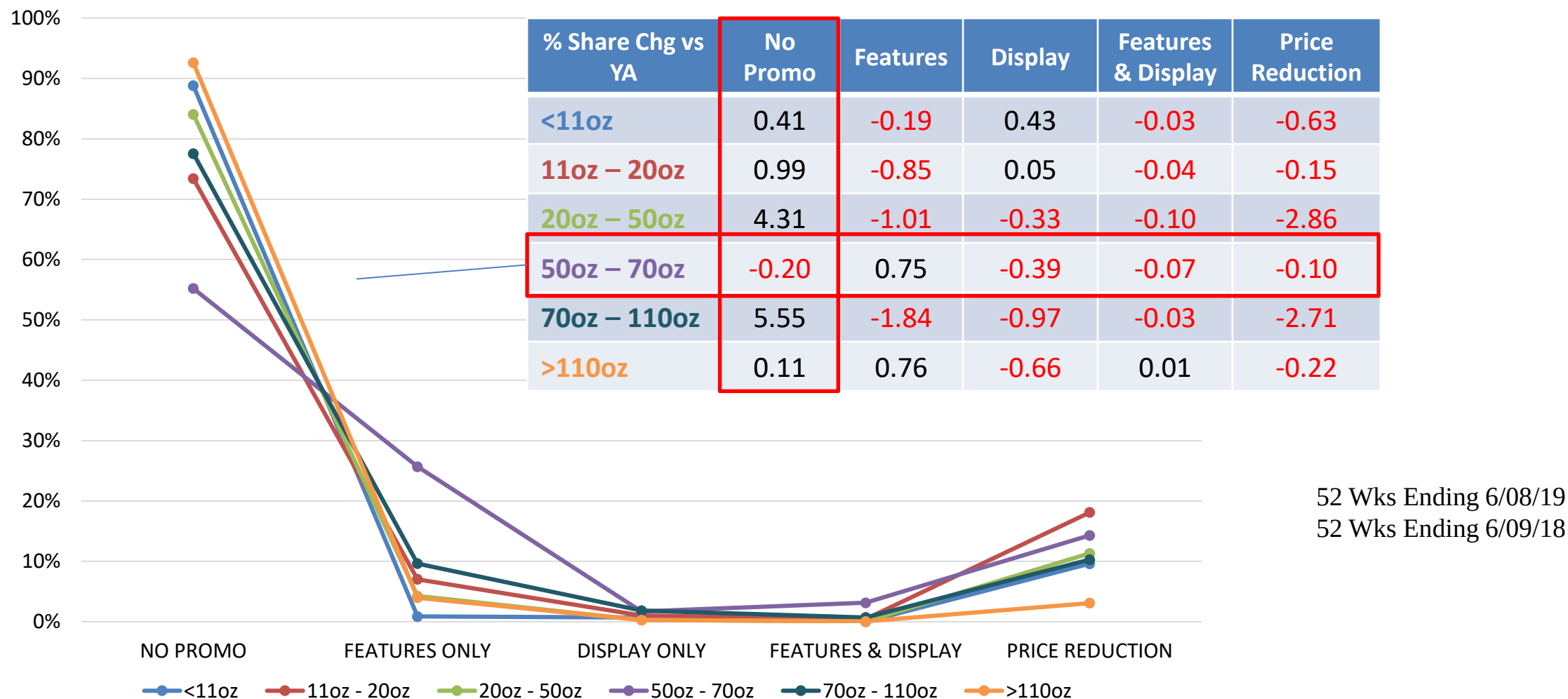
	Share Chg from 2017-18	Share Chg from 2016-17
NFC OJ	0.18%	0.01%
RECON OJ	0.12%	0.58%
FRZ OJ	-0.13%	-0.24%
SS OJ	-0.12%	0.17%
OJ BL	-0.05%	-0.52%

2018-19:16 Wks Ending 06/08/19
 2017-18:16 Wks Ending 06/09/18
 2016-17:16 Wks Ending 06/10/17

Share of Dollar Sales in OJ Category



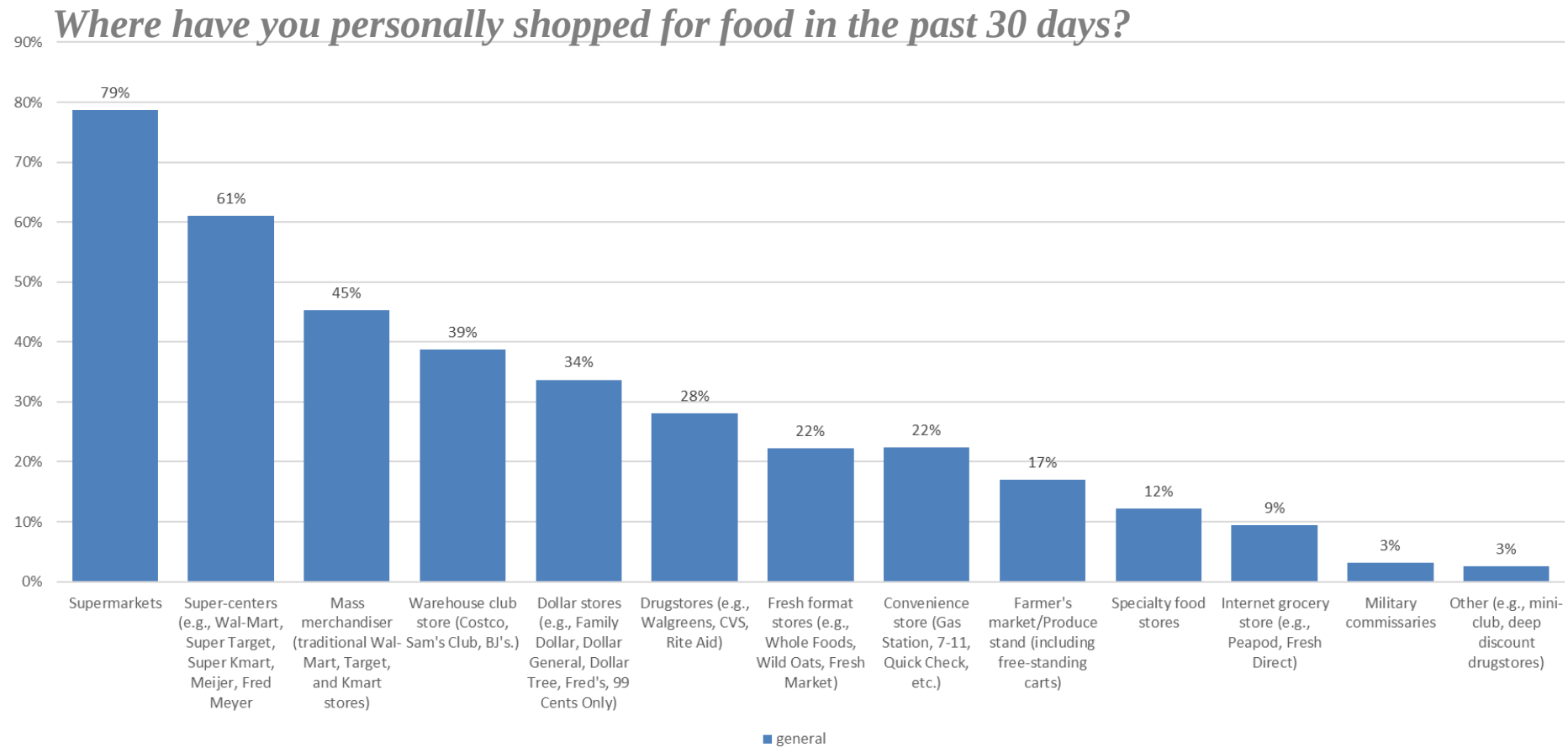
NFC – %Chg in Share of Volume Sales by Activity



Source: FDOC custom Nielsen database



Shopping Locations



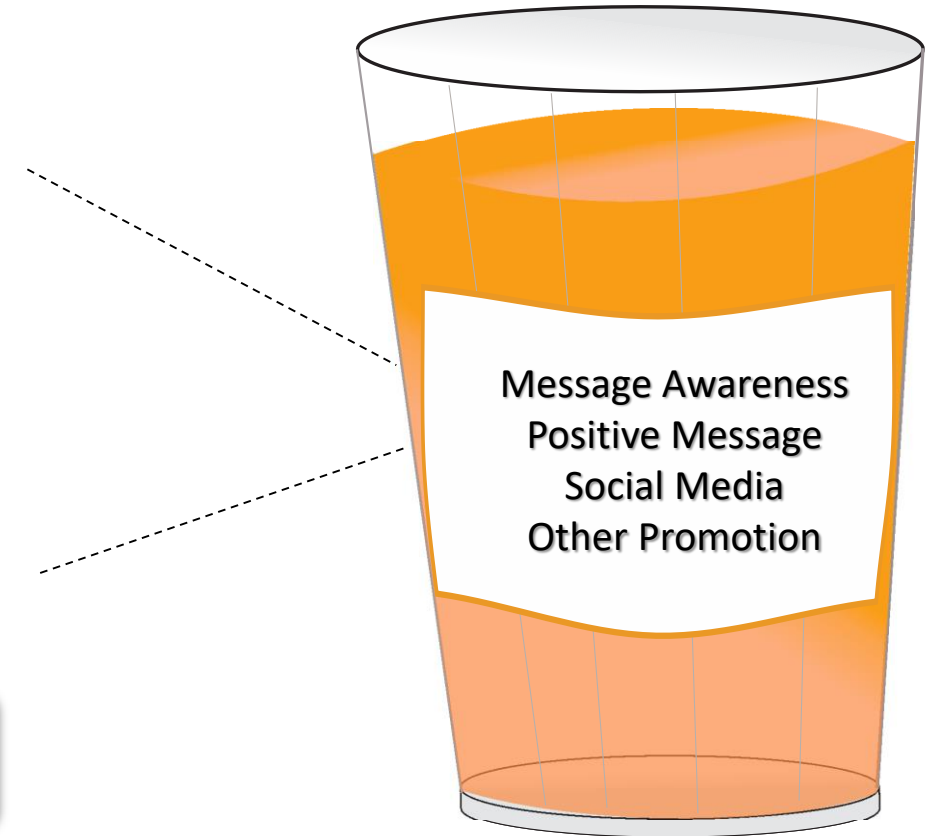
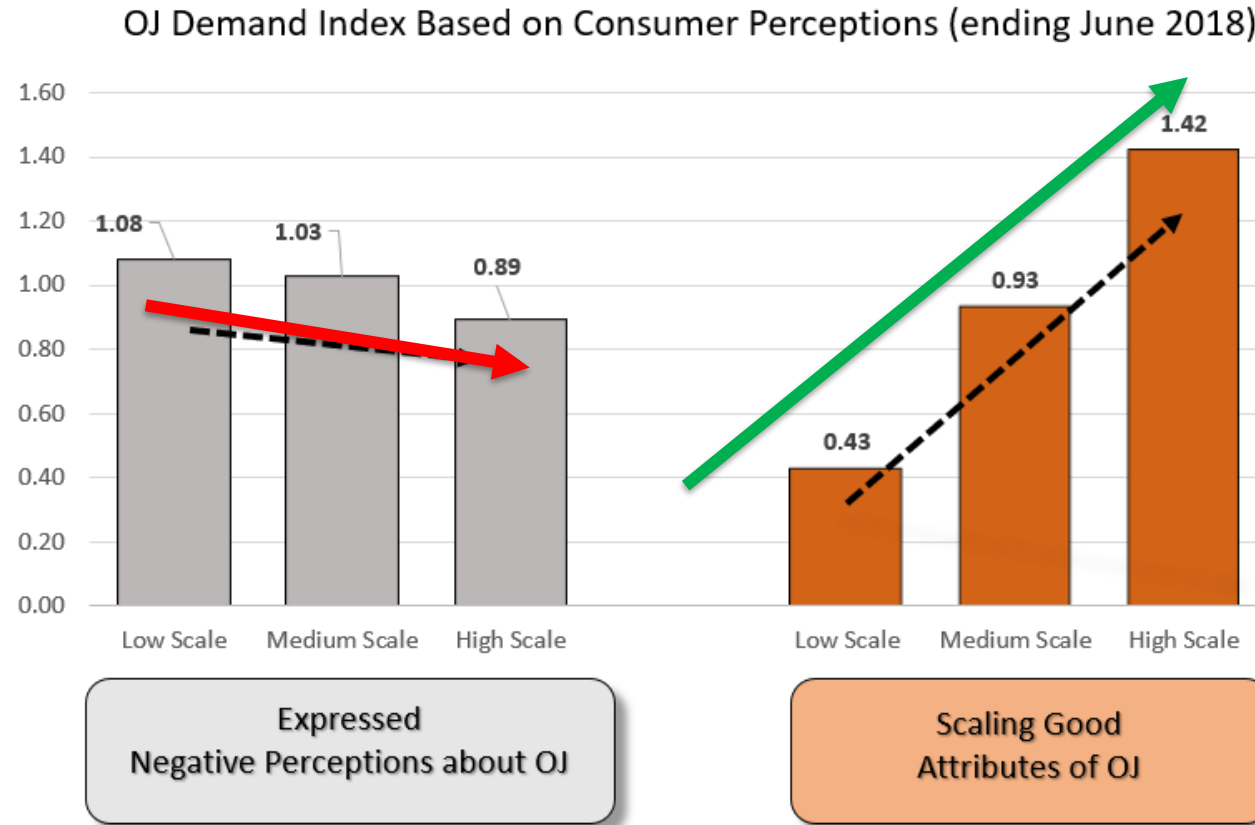
Source: Florida Department of Citrus, 2019



Summary OJ Retail Sales Trends

- Incremental decline in total OJ Category YOY.
- Decline in total NFC volume and dollar sales associated with decline in distribution and expenditures for promotional activity.
- Decrease in price and/or higher promotional activity contributed to increase in volume and/or dollar sales within some categories of container sizes this season.
- Adjustment in packaging skews YOY comparison for NFC 50-70oz container range.

Consumer Demand for OJ Increases with Positive Awareness



Citation: Y. Heng, R.W. Ward, L.A. House and M.L. Zansler. "Assessing key factors influencing orange juice demand in the current US market," Agribusiness. 2018;1–15.

Florida Orange Juice Nutrition Research

Samantha Lane
Global Marketing Director



100% Orange Juice...A Nutrient Dense Beverage

Excellent Source:

Vitamin C

Calcium, Vitamin D (fortified)

Good Source

Potassium

Folate

Thiamin

Vitamin B6

Lesser Amounts (<10% Daily

Value):

Magnesium

Riboflavin

Niacin

Vitamin A

Phytonutrients:

Flavonoids

- **Hesperidin** – unique to citrus
- Naringenin

Carotenoids

- Beta-carotene
- Alpha-carotene
- Beta-cryptoxanthin
- Lutein
- Zeaxanthin

**8 oz.
serving**



Research Supporting 100% OJ

- Heart Health



- Higher diet quality and increased levels of key nutrients



- Brain Health



- No Association with Weight Gain



- Blood Sugar



- Hydration and rehydration after workouts



Bioactives: Polyphenols

Polyphenols are associated with benefits seen with cocoa/chocolate, red wine, green tea, grape seeds and skin



Red Wine
Resveratrol



Green Tea
Catechin



100% Orange Juice
Hesperidin

Hesperidin plays a valuable role in the overall benefits of 100% orange juice and may play a positive role in:

- Antioxidant activities
- Anti-inflammatory processes
- Heart and vascular health
- Glucose metabolism
- Cognition

OJ is the only commonly consumed food that is a **SIGNIFICANT**
SOURCE OF HESPERIDIN



Communicating the Research

Samantha Lane
Global Marketing Director



2018-2019 Methods to Reach Consumers



OJ Nutrition Website: Floridajuice.com



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Florida OJ Health Benefits

Drinking Florida Orange Juice is not only delicious, it delivers a powerful combination of nutrients, vitamins, and antioxidants that have proven health benefits. From helping to reduce the risk of kidney stones to fighting inflammation, Florida Orange Juice is an excellent choice for overall health. See below to learn more about the benefits Florida Orange Juice provides:



Cardiovascular Health >

The nutrients and vitamins found in 100% orange juice play a role in maintaining a healthy heart.



Immune System Support >

The vitamins and minerals found in 100% orange juice support a healthy immune system.



Skin Health >

The nutrients and antioxidants found in 100% orange juice can help you maintain healthy skin.



Iron Absorption >

100% orange juice may help your body absorb iron and other nutrients from foods.



Cognitive Function >

The nutrients and plant compounds in 100% orange juice may have positive effects on brain function.



Respiratory Health >

100% orange juice contains essential nutrients that may improve asthma symptoms.



Kidney Health >

100% orange juice is one best juices to drink that may reduce the risk of kidney stones.



Bone Health >

One 8-ounce glass of 100% orange juice fortified with calcium and vitamin D provides nutrients that may help maintain strong bones.



Inflammation and Oxidative Stress >

100% orange juice has an array of nutrients with antioxidant powers.

Nutrition Website: Weight Management

Florida Orange Juice - Post X Weight Management and Florida X
th-nutrition/orange-juice-health-benefits/weight-management/



Weight Management

Impact of 100%

Florida Orange Juice has no added sugars, Americans recognize it as a healthy choice to maintain a healthy weight.

Studies report that 100% orange juice compared to other beverages has fewer calories and less sugar than many commonly consumed fruit juices AND has fewer calories.^{15,16}

100% Fruit Juice

Multiple systematic reviews have found that 100% fruit juice consumption is associated with weight management issues.

Detailed Nutrition Information

100% Orange Juice and Weight in Adults

Clinical studies have reported that 100% orange juice intake had no negative effects on BMI, waist circumference, body weight or body composition in adults (including large amounts of approximately 25 to 33 ounces per day for four to 12 weeks).⁵⁻¹⁰ In fact, men and women who consumed orange juice were reported to have a lower BMI and were 21 percent less likely to be obese compared to adults not consuming orange juice.⁴

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DID YOU KNOW?

many commonly consumed fruit juices AND has fewer calories.^{15,16}