UF IFAS Extension UNIVERSITY of FLORIDA

FE945

Florida Citrus Outlook 2013/14 Season[1]

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Introduction

This report provides supply, demand, and price projections of Florida citrus for the 2013/14 season based on the November 2013 forecast of the 2013/14 Florida citrus crop, by variety (FASS 2014). Projections are for Florida orange juice (OJ) and grapefruit juice (GJ) pack, movement, and ending inventory, along with estimates of US consumption and retail sales of OJ and GJ, preliminary on-tree price estimates, and Brazil's OJ outlook (given its bearing on Florida's OJ situation).

Aggregate Florida–Brazil OJ availability (beginning inventories and production from fruit) was relatively stable and about 0.4% higher in the 2012/13 season, compared to the 2011/12 season. Aggregate Florida–Brazil OJ availability was estimated to drop in the 2013/14 season by about 8.5%, coinciding with the projected decrease in aggregate OJ production in both Florida and Brazil. The Florida orange crop was down in 2012/13, compared to the 2011/12 season, by 13.1 million boxes (about a 9% decrease). Above average levels of fruit drop in the Florida crop contributed significantly to the production decline. The orange crop for Florida in 2013/14 was estimated to decline further to 125 million boxes, or 6.4% lower than in 2012/13, representing the lowest production level in Florida since the freeze-affected 1989/90 season (110.2 million boxes). With respect to Brazil, while the Brazilian orange crop was down in 2012/13 to 504 million boxes, compared to 554 million boxes in 2011/12, the 2012/13 crop was the second largest crop for Brazil since the 1997/98 season. The Brazilian orange crop in 2013/14 was estimated at about 407 million boxes, nearly 100 million boxes smaller than in 2012/13 (the 2010/11 season crop was 388 million boxes, and the 2005/06 season crop for Brazil was 406 million boxes).

During the course of the 2012/13 season, stocks in Florida and Brazil continued to increase, leaving products on hand to begin the 2013/14 season about 11% higher than in 2011/12. Florida citrus on-tree earnings were projected at $1.2 billion in 2013/14, representing about an 8% increase from the 2012/13 preliminary number (and about 27% lower than 2011/12 on-tree earnings), leading to some declines in market demand.

Orange Forecast and Utilization (Florida and Brazil)

Florida

The FASS November estimate of the 2013/14 Florida round orange crop was 125 million boxes, a decrease of 8.6 million boxes, or 6.4% from the 2012/13 crop of 133.6 million boxes (Table 1). The 2013/14 early and mid-season orange crop, including Navel oranges, was forecasted at 58.0 million boxes, down 9.1 million boxes from 2012/13 (about 13% lower). This would be the lowest production level of early mid-season oranges since the 1984/85 season (55 million boxes). The Navel orange crop was forecasted at 2.1 million boxes (5% lower than 2012/13), while the Valencia crop was forecasted at 67.0 million boxes (up 0.5 million boxes from 2012/13).

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Certified fresh orange shipments for 2013/14 were estimated at 4.3 million boxes, down 6.4% from the 4.6 million boxes in 2012/13. Florida's processed orange utilization was estimated at 119.4 million boxes, down 8.2 million boxes from the 2012/13 utilization of 127.6 million boxes. The amount of fruit directly utilized for chilled orange juice (COJ) or not-from-concentrate (NFC) was estimated at 77.1 million boxes in 2013/14, down 2.1 million boxes from 2012/13. A small amount of NFC–COJ boxes was estimated to end up in the FCOJ supply chain, about 1.3 million boxes in 2012/13. The amount of oranges utilized in 2013/14 to produce FCOJ was estimated at 41.1 million boxes, down 5.9 million boxes from the 2012/13 level of 47 million boxes. The FCOJ yield per box was projected to increase from 1.59 gallons of 42° Brix concentrate per box in 2012/13 to 1.60 gallons in 2013/14.

Brazil

Orange production in the State of São Paulo), where most of Brazil's oranges used for processing are grown, was estimated to decrease in 2013/14 from the high crop in 2012/13. The United States Department of Agriculture's Foreign Agricultural Service (USDA/FAS) estimated the 2013/14 São Paulo orange crop at 290 million boxes, down 100 million boxes from the 390 million boxes produced in 2012/13 (Table 2). São Paulo's processed utilization (FCOJ and NFC for export) in 2013/14 was estimated at 240 million boxes, down 70 million boxes from 2012/13. São Paulo's fresh utilization in 2013/14 was estimated at 50 million boxes, down 30 million boxes from 2012/13. There is some uncertainty regarding precisely how many boxes actually will be processed in Brazil. (Note: fresh utilization includes actual fresh consumption plus losses from natural drop, harvesting, transportation, and packing, as well as fruit utilized to produce NFC OJ for the domestic market.) Therefore, some alternative estimates of Brazil's processed utilization and OJ production are provided in Table 3 (processed boxes depend on crop size and fresh utilization).

São Paulo's juice yield per box was estimated to be relatively stable, from 1.32 in 2012/13 to 1.33 in 2013/14; juice yields for the remainder of Brazil were projected to decrease by 1.9% in 2013/14. Applying Brazil's estimated juice yields to the forecasted processed boxes, Brazil's OJ production from São Paulo and other regions was estimated at 1,393 million single-strength-equivalent (SSE) gallons in 2013/14, down 348 million SSE gallons (or 20%) from 2012/13. Alternative estimates of Brazil OJ production in 2013/14 in Table 3 range from 1,344 million SSE gallons to 1,441 million SSE gallons. In the following discussion, the middle Brazil OJ production estimate of 1,393 million SSE gallons in 2013/14 was assumed.

Orange Juice (OJ) Inventory and Production (Florida and Brazil)

Comparisons of Florida and Brazil orange crops, fresh and processed utilization levels, and juice yields are provided in Table 4, followed by OJ production estimates in Table 5. OJ availability levels, beginning inventory plus production, are provided in Table 6. Aggregate OJ production for Florida and Brazil in 2013/14 was projected at 2,185 million SSE gallons, down 395 million SSE gallons (or 15.3%) from the 2,580 million SSE gallons in 2012/13. As noted above, Brazil's OJ production in 2013/14 was estimated at 1,393 million SSE gallons, down 348 million SSE gallons from 2012/13, while Florida's OJ production was estimated at 793 million SSE gallons, down 46 million SSE gallons from 2012/13.

Brazil's beginning OJ inventory (July) for the 2013/14 season was estimated at 635.0 million SSE gallons, up 22.3 million SSE gallons from 2012/13 (Table 6). Florida's beginning inventory for the July/June season was 708.0 million SSE gallons, up 49.3 million SSE gallons from the 2012/13 level of 658.8 million SSE gallons. Aggregate Florida–Brazil OJ beginning inventory in 2013/14 was estimated at 1,343.1 million SSE gallons, up 71.6 million SSE gallons.

Adding July beginning inventories to OJ production, aggregate Florida–Brazil OJ availability in 2013/14 (July/June) was estimated at 3,528.4 million SSE gallons, down 323.0 million SSE gallons (or 8.4%) from 2012/13. Some alternative 2013/14 OJ availability, movement and ending inventory scenarios for Brazil (July/June season) and Florida (October/September season) are shown in Table 7.

Florida

Estimates of Florida's OJ situation (October/September season) are shown in Table 9. Florida's OJ imports are based on the middle scenario for Brazil's exports (Tables 7 and 8). Three scenarios for 2013/14 are provided in Table 9, varying with respect to the Florida OJ movement. Discussion focuses on the middle scenario.

Florida ended the 2012/13 season with an OJ inventory level of 523.3 million SSE gallons, or 28.4 weeks of supply, compared to 22.7 weeks in the 2011/12 season. Adding the 2012/13 ending inventory to the 2013/14 estimate of Florida OJ production of 792.8 million SSE gallons plus an estimated import level of 132.5 million SSE gallons

(includes foreign and domestic imports, net futures, reprocessed tangerine juice, and a net loss/gain from reprocessing), Florida's OJ availability in 2013/14 was estimated at 1448.7 million SSE gallons, down 33.1 million SSE gallons (or 2.2%) from 2012/13. Total movement in 2013/14 was estimated at 927.4 million SSE gallons, down 3.2% from 2012/13. At the end of the 2013/14 season, Florida's OJ inventory level would be 521.3 million SSE gallons (29.2 weeks of supply). Based on alternative movement levels (5% greater or less than that discussed above), ending inventories would range from 474.9 million SSE gallons (25.4 weeks) to 567.7 million SSE gallons (33.5 weeks). Estimates of Florida's inventory, production, and movement levels for FCOJ and NFC, underlying the total OJ estimates in Table 9, are shown in Tables 10 and 11.

Brazil

Based on Brazilian Department of Foreign Trade (SECEX) data, an estimated 1,658.2 million SSE gallons of OJ were exported from São Paulo in 2012/13, up 2.5% from the 1,618.5 million SSE gallons exported in 2011/12 (Table 8). Brazil's OJ exports in 2012/13 to European, Far East Asian, and North American free trade (NAFTA) countries were 1,142.8 million SSE gallons (71%), 146.2 million SSE gallons (11%), and 291.3 million SSE gallons (13%), respectively (some product sent to Europe may have been re-exported to other markets). For the 2013/14 season, Brazil's OJ exports were estimated at 1,679.1 million SSE gallons, up 1.3% from 2012/13. The change in exports was expected since Brazil's OJ inventory remains high. Brazil's exports to NAFTA countries were estimated to increase by 1.3%, based on the projection of a decline in Florida OJ availability.

US Orange Juice (OJ) Supply, Presumed Consumption, and Retail Sales

In 2013/14, total US presumed OJ consumption was estimated at 919 million SSE gallons, down 12% from an estimated 1,045 million SSE gallons consumed in 2012/13 (Table 12). (Note: US presumed consumption for OJ or GJ is a disappearance measurement calculated as season-beginning US OJ inventory plus Florida production plus other US production plus US imports minus US exports minus season-ending US inventory. The higher level of presumed consumption for 2012/13 reflected supply-side factors, namely a 90% increase in US OJ imports, whereas the projected decline in presumed consumption for 2013/14 reflected the weakened supply situation coupled with flat market growth. US OJ imports for 2013/14 were estimated at 281 million SSE gallons, down 140 million SSE gallons (or 33.3%) from 2012/13. Imports were estimated to decline in 2013/14 as a result of increased inventory levels and a declining domestic movement. US exports were estimated at 186 million SSE gallons, up from an estimated 169 million SSE gallons exported in 2012/13. Higher exports were anticipated due to Brazil's decreased production and an orange crop with lower than normal Brix levels. Other US OJ production was estimated at 40 million SSE gallons, up 10 million SSE gallons from 2012/13 based on USDA forecasts of the orange crops in California and Texas.

Presumed consumption is a rough measure of market performance. Nielsen provides more exact measures but for reduced market coverage. The Florida Department of Citrus (FDOC) purchases Nielsen retail outlet data for OJ sales in grocery stores with annual sales of at least $2 million, drug stores with annual sales of at least $1 million, mass merchandisers, Wal-Mart, clubs (Sam's and BJ's), dollar stores (Dollar General, Family Dollar, and Fred's), and military/DECA. The analysis below is based on these data.

Retail OJ sales in the upcoming season will depend largely on the OJ price level. Estimates are provided for three price scenarios (Table 13):

1. Scenario 1 (middle/base price): overall retail OJ price increases slightly from $6.20 per SSE gallons in 2012/13 to $6.29 per SSE gallon in 2013/14 (a 1.5% increase)

2. Scenario 2 (low price): prices decline by about 1.5% (about $0.09 per SSE gallon) from the 2012/13 price

3. Scenario 3 (high price): prices increase by about 4.3% (about $0.27 per SSE gallon) from the 2012/13 price

In addition to its own price, the demand for OJ depends on the level of OJ advertising and promotion, consumer income, and competition from other beverages through prices and advertising/promotion levels of these beverages, as well as other factors.

For Scenario 1 (middle/base price), OJ sales in Nielsen retail outlets were estimated at 557.5 million SSE gallons in 2013/14, down 1.0% from the 2012/13 sales of 563.2 million SSE gallons (Table 13). For Scenario 2 (low price), sales were projected at 585.2 million SSE gallons, up 3.9% from 2012/13. For Scenario 3 (high price), 2013/14 sales were projected at 532.0 million SSE gallons, down 5.5% from 2012/13. Estimates of sales by segment (FCOJ, NFC, and RECON) are also shown in Table 13. Note the growing

share of NFC gallon sales going from 50% in 2005/06 to 57% in 2012/13. Retail and other price assumptions, along with recent historical data, are summarized in Table 14. As illustrated in Figure 1, historical OJ prices are for FCOJ Futures and Rotterdam prices.

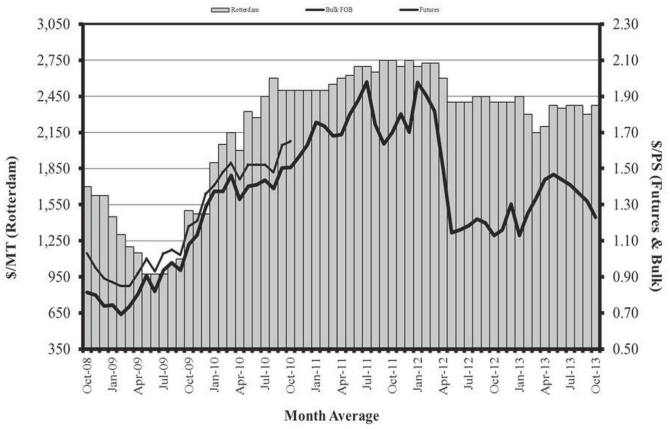

Figure 1. FCOJ futures, Florida bulk FOB and Rotterdam monthly average prices, September 2007 through September 2013

Florida Grapefruit Crop, Utilization, and Sales

The FASS November estimate of Florida's grapefruit production in 2013/14 was 17.8 million boxes, a decrease from 18.4 million boxes in 2012/13 (Table 15). The 2013/14 white grapefruit crop (including seedy) was forecasted at 4.8 million boxes, down 0.45 million boxes from 2012/13, and the colored grapefruit crop was forecasted at 13.0 million boxes, down 0.1 million boxes from 2012/13. Certified fresh grapefruit shipments in 2013/14 were estimated at 6.9 million boxes, down 0.2 million boxes from 2012/13. Non-certified utilization was estimated at 0.7 million boxes in 2013/14, the same as 2012/13. Processed utilization in 2013/14 was estimated at 10.2 million boxes, down 0.3 million boxes from 2012/13. Utilization for frozen concentrated grapefruit juice (FCGJ) in 2013/14 was estimated at 5.8 million boxes, down 0.3 million boxes from 2012/13. Chilled grapefruit juice or NFC-GJ in 2013/14 was projected to account for 4.1 million boxes, down 0.1 million boxes from 2012/13.

Florida Fresh Grapefruit Shipments, by Market

Domestic fresh grapefruit shipments in 2013/14 were projected at 5.3 million cartons, down 0.7 million cartons from 2012/13 (Table 16). It was estimated that the amount of competitive Texas grapefruit would decrease based on the November forecast of a 15% decrease in Texas grapefruit production in 2013/14. Export shipments were projected at 8.5 million cartons, up 0.2 million cartons from 2012/13. A rebound in fresh exports to Japan was estimated in 2013/14 after exports decreased in the 2012/13 season due to lower quality, smaller sizes, and unfavorable exchange rates. While FASS reports of fresh grapefruit remained comparatively small, industry sources suggested there was more variability in fruit size, higher internal fruit quality, and more favorable foreign exchange rates in 2013/14 than in 2012/13 (Figure 2).

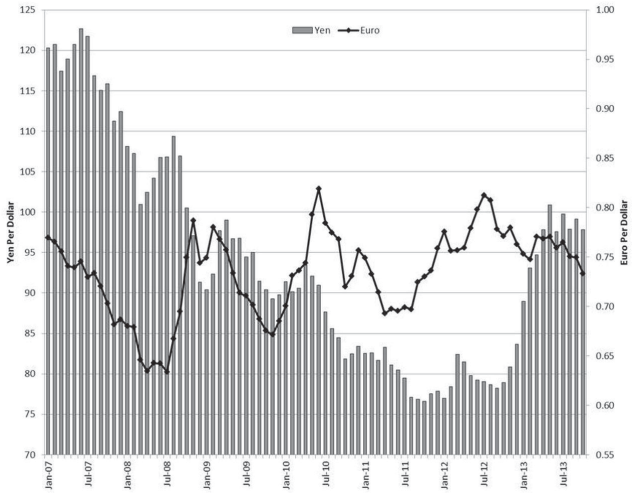

Figure 2. Euro and Yen exchange rates, January 2007 through October 2013

Florida Grapefruit Juice (GJ) Inventory and Movement

Florida began the 2013/14 season with 34.0 million SSE gallons of GJ in inventory (29.6 weeks supply), down from the 2012/13 level of 36.6 million SSE gallons (31.0 weeks) (Table 17). GJ production in 2013/14 was estimated at 49.4 million SSE gallons, down 1.6 million SSE gallons from 2012/13. (Note: GJ production includes annual crops, imports, miscellaneous supplies, and adjustments). Combining production with beginning inventories, GJ availability in 2013/14 was estimated at 83.4 million SSE gallons, down 4.1 million SSE gallons (or 4.7%) from 2012/13. GJ movement in 2013/14 was estimated at 49.9 million SSE gallons, down 6.7% from 2012/13. The 2013/14 ending-inventory for Florida GJ was estimated at 34.0 million SSE gallons (34.9 weeks supply). Table 17 also shows the availability, movement, and inventory estimates for FCGJ and chilled grapefruit juice (CGJ). GJ exports in 2013/14 were estimated at 19.2 million SSE gallons, down 1.6 million SSE gallons from 2012/13, as reported by FCPS (Table 18). In some seasons, the level of GJ exports reported by FCPS has exceeded the level reported by the United States Department of Commerce (USDOC), whose

data were tracked to provide an indication of market shares across export destinations. (Note: Although there are several reasons for the disparity, one reason involves coding differences and the possibility that some GJ, such as fortified GJ, may be included in other catch-all juice categories. Fruit and vegetable juices fortified with vitamins or minerals is a growing category, and while the USDOC has specified codes to track fortified OJ, they do not break out fortified GJ.)

US Grapefruit Juice (GJ) Supply, Presumed Consumption, and Retail Sales

US presumed consumption of GJ was estimated at 50.6 million SSE gallons in 2013/14, compared to 51.9 in 2012/13 (Table 19). Presumed consumption in 2012/13 ended higher than in 2011/12 (46.6 million SSE gallons) primarily due to higher production of GJ in other states as well as from a slight decline in exports. US GJ availability, measured by Florida beginning inventory plus Florida and other US production plus imports, was estimated to decrease by 6.4 million SSE gallons, from 106.7 million SSE gallons in 2012/13 to 100.3 million SSE gallons in 2013/14. Exports were estimated to decrease and inventories were estimated to be drawn down. Nielsen retail outlet sales of GJ were projected to decrease from 17.6 million SSE gallons in 2012/13 to 16.1 million SSE gallons in 2013/14, assuming an increase in the overall price of GJ of $0.25 per SSE gallon (Table 20). Assuming GJ prices were 3% below the middle scenario price level ($6.92 per SSE gallon), retail GJ sales in 2013/14 were estimated at 16.6 million SSE gallons. Assuming GJ prices in 2013/14 were 3% above that in the middle scenario ($7.35 per SSE gallon), retail GJ sales were estimated at 15.7 million SSE gallons.

Florida Specialty Crop and Utilization

The FASS November estimate of Florida's specialty citrus production in 2013/14 was 4.75 million boxes, an increase of 0.47 million boxes from 2012/13 (Table 21). The 2013/14 tangelo crop was estimated at 1.00 million boxes, same as 2012/13. The 2013/14 tangerine crop was estimated at 3.75 million boxes, up slightly from 2012/13. Early and late (Honey) tangerine production levels were estimated at 2.05 and 1.70 million boxes, respectively, in 2013/14, up 0.14 and up 0.33 million boxes, respectively, from 2012/13. Total certified fresh specialty shipments in 2013/14 were estimated at 2.66 million boxes, up slightly from 2012/13.

Preliminary On-Tree Expectations

Prices are critical variables for the various projections in this report. For example, they are primary explanatory variables in projecting volume sales, which in turn determine inventory levels. Various data on citrus prices are reported from which price trends can be identified and used in the analysis. This section is a discussion of some of the price trends at the grower level. (Note: Information does not imply minimum pricing or FDOC staff opinion on optimal pricing.)

State average on-tree prices for 2013/14 were estimated (Tables 22–24) following the same methodology used by FASS to calculate on-tree prices reported in *Florida Citrus Statistics, 2011/12*. The on-tree price estimates are based on assumed state average prices and costs, and may not reflect the returns for any particular grower, to the extent that prices and costs faced by a grower deviate from the averages.

Separate on-tree prices for fresh and processed utilization were estimated following the treatment of eliminations by FASS. In Tables 22 and 23, fresh on-tree earnings are for fruit meeting fresh standards (100% pack out). In these two tables, fruit not meeting fresh standards (eliminations) that were sent to juice processors after being rejected by packinghouses are included with fruit sent directly from the field to processing plants (field run) in estimating processed on-tree prices. Table 24 shows the on-tree prices for various categories, including all fruit sent to packinghouses (certified fresh plus eliminations).

For fresh citrus, the on-tree price estimates are the assumed FOB prices minus packing costs minus pick and haul costs. Estimates from the UF/IFAS Citrus Research and Education Center in Lake Alfred, Florida (see various reports at the Citrus Economics website at http://www.crec.ifas.ufl.edu/Extension/Economics) and prices reported by the National Agricultural Statistics Service (*Citrus Fruit 2013 Summary*) were used in developing cost assumptions. According to the National Agricultural Statistics Service (NASS) packing costs are differences between FOB and PHD (packinghouse door or delivered-in) prices, and Pick and haul costs are differences between on-tree and PHD prices.

Based on assumed average delivered-in prices for early/mid-season and Valencia oranges of $1.50 per pound solids (PS) and $1.76 per PS, respectively, average processed on-tree prices in 2013/14 for early/mid-season and Valencia oranges were estimated at $6.47 per box and $9.28 per box, respectively (Table 22), compared to $5.58 per box and

$8.30 per box (preliminary), respectively, in 2012/13. The estimated delivered-in prices in 2013/14 were weighted averages of priced (spot and contract) and non-priced fruit (long-term, cooperative, processor-owned). Industry sources were consulted to assess the proximity of assumptions on contract prices with actual market values. On-tree prices for alternative scenarios are shown in Table 22. Total processed orange on-tree revenue was projected at $949.3 million in 2013/14, compared to the preliminary estimate of $888.4 million for 2012/13 (Table 23). Fresh orange on-tree revenue was estimated at $72.3 million in 2013/14, compared to $65.4 million in 2012/13.

Based on an average delivered-in price for white grapefruit juice of $1.45 per PS and for red grapefruit of $1.10 per PS, processed on-tree prices in 2013/14 were projected at about $4.48 per box for white grapefruit and about $2.60 per box for red grapefruit (scenarios for delivered-in prices above and below these levels are shown in Table 22). Total processed grapefruit on-tree revenue in 2013/14 was estimated at $33.5 million, compared to $25.8 million in 2012/13. Fresh on-tree revenue for grapefruit was estimated at $85.5 million in 2013/14, compared to $85.4 million in 2012/13, assuming roughly equal FOB prices for fresh white and colored seedless grapefruit in 2013/14.

Specialty citrus on-tree revenue was estimated at $62.9 million in 2013/14, compared to $53.6 million in 2012/13. Overall, total on-tree revenue for oranges, grapefruit, and specialty citrus was projected at $1,203.5 million in 2013/14, up 7.8% from the preliminary estimate of $1,116.5 million for 2012/13.

Summary: Implications for the Florida Grower

The November Florida orange crop forecast for the 2013/14 season was 125.0 million boxes, down 8.6 million boxes (or 6.4%) from 2012/13. Based on this forecast, Florida OJ production was projected to decrease from 839.26 million SSE gallons in 2012/13 to 792.8 million SSE gallons in 2013/14, a decrease of 46.4 million SSE gallons. Brazil's OJ production was projected to decrease by 348.2 million SSE gallons, from 1,740.8 million SSE gallons in 2012/13 to 1,392.6 million SSE gallons in 2013/14.

Brazil's beginning inventory level for the 2013/14 season was estimated to be up by 22.2 million SSE gallons, while Florida's beginning inventory level was up by 49.2 million SSE gallons at the beginning of July 2013, the start of Brazil's July/June season, which was used for the aggregation of OJ supplies from Florida and Brazil. Overall, aggregate production and beginning inventories in Florida and Brazil were estimated to be down by 323.2 million SSE gallons (or 8.4%) in 2013/14.

The decrease in aggregate Florida–Brazil OJ availability underlies the 2013/14 projected weighted average delivered-in prices (cash, contract, and participation) of $1.50/PS for processed early and mid-season oranges and $1.80/PS for processed Valencia oranges, as well as the processed orange on-tree revenue estimate of $1,203.5 million (up by $85 million from the 2012/13 preliminary estimate).

Retail OJ sales in 2013/14 were projected at 557.5 million SSE gallons, down 1.0% from 2012/13, assuming average price levels increase by about 1.5%. US presumed OJ consumption in 2013/14 was estimated to be down 12% from 2012/13. The projected reduction in presumed consumption reflects in large part the constrained supply situation.

FASS estimated that Florida's grapefruit crop will be 17.8 million boxes in 2013/14, down from the 18.4 million boxes in 2012/13. For 2013/14, GJ availability was estimated to be down 4.7% as the result of the smaller crop size, while GJ movement was projected to be down based on higher prices. The season-ending GJ inventory level was estimated to be down by about 2.5 million SSE gallons. On-tree returns for processed grapefruit (eliminations and field-run fruit) were estimated at $33.5 million in 2013/14, while fresh on-tree returns were estimated at $85.5 million, resulting in a total grapefruit on-tree revenue estimate of $119.0 million, an increase from the preliminary estimate of $111.1 million for 2012/13.

Overall, total fresh and processed on-tree revenue for oranges, grapefruit, and specialty citrus were projected at $1,203.5 million in 2013/14, up 7.8% from the preliminary estimate of $1,116.5 for 2012/13.

Table 1. Utilization of Florida round oranges

Season	Volume					
	Fresh	FCOJ	COJ	Noncertified	Other[a]	Total
			million 90-pound boxes			
1999/2000	6.9	129.5	90.1	2.5	4.0	233.0
2000/01	6.7	120.5	89.6	3.0	3.5	223.3
2001/02	6.9	132.2	85.9	2.5	2.5	230.0
2002/03	6.3	98.7	92.5	3.4	2.1	203.0
2003/04	6.2	137.0	93.4	3.7	1.7	242.0
2004/05	4.9	52.2	88.5	2.5	1.7	149.8
2005/06	4.5	49.1	90.2	2.8	1.1	147.7
2006/07[b]	5.0	46.0	75.2	1.4	1.4	129.0
2007/08[b]	4.4	78.0	85.1	1.4	1.3	170.2
2008/09[b]	5.5	71.2	82.8	1.4	1.6	162.5
2009/10[b]	4.5	51.3	75.1	1.4	1.4	133.7
2010/11[b]	4.5	50.3	82.6	1.5	1.6	140.5
2011/12[b]	4.6	63.9	75.5	1.5	1.2	146.7
2012/13[b]	4.6	47.0	79.2	1.4	1.3	133.6
2013/14f[b]	4.3	41.1	77.1	1.3	1.2	125.0

f=Forecast.

[a] Includes CSSOJ, blends, and utilization by nonmembers of Florida citrus processors' statistics.

[b] Includes Temple oranges in 2005/06 and subsequent years; in prior years, Temple oranges were included with specialty citrus.

Table 2. Utilization of Brazil round oranges

Item	Region	2012/13[a]	2013/14f	Change	% Change
			million 90-pound boxes		%
Production	Sao Paulo	390	290	–100	–25.6
	Other	114	117	3	2.6
	Total	504	407	–97	–19.2
Fresh	Sao Paulo	80	50	–30	–37.5
	Other	97	97	0	0.0
	Total	177	147	–30	–16.9
Processed	Sao Paulo	310	240	–70	-22.6
	Other	17	20	3	17.6
	Total	327	260	–67	–20.5
			SSE gallons per box		%
Juice Yield	Sao Paulo	5.32	5.37	0.05	0.9
	Other	5.32	5.22	–0.10	–1.9
	Total	5.32	5.36	0.04	0.8
			million SSE gallons		%
OJ Production	Sao Paulo	1,650	1,288	–362	–21.9
	Other	91	104	14	15.4
	Total	1,741	1,393	–348	–20.0

[a] USDA/FAS, *Brazil Citrus Semi-annual 2013*, GAIN Report No. BR13003, June 18, 2013.

Table 3. Alternative 2013/14 Sao Paulo OJ production scenarios

Sao Paulo Processed Utilization		OJ Production			
		Sao Paulo	Other	Total Brazil	% change[a]
	million 90-pound boxes			*million SSE gallons*	
Low	232	1,243	101	1,344	–22.8
Middle	240	1,288	104	1,393	–20.0
High	248	1,333	108	1,441	–17.2

[a] From 2012/13 production (1,741 million SSE gallons).

Table 4. Comparative utilization of round oranges, Brazil and Florida

Season	Brazil[a]				Florida			
	Production	Utilization[b]		Juice Yield	Production	Utilization		Juice[c] Yield
		Fresh	Processed			Fresh	Processed	
	million 90-pound boxes			*SSE gallons/box*	*million 90-pound boxes*			*SSE gallons/box*
1999/2000	450	136	314	6.03	233.0	9.4	223.6	6.23
2000/01	420	139	281	5.93	223.3	9.7	213.6	6.25
2001/02	361	134	227	6.00	230.0	9.4	220.6	6.30
2002/03	450	135	315	5.99	203.0	9.7	193.3	6.14
2003/04	377	120	257	6.24	242.0	9.9	232.1	6.17
2004/05	467	117	350	5.90	149.8	7.4	142.4	6.30
2005/06	406	110	296	6.06	147.7	7.3	140.4	6.45
2006/07	441	110	331	6.06	129.0	6.4	122.6	6.55
2007/08	453	113	340	6.06	170.2	5.9	164.3	6.62
2008/09	413	124	289	6.34	162.5	6.9	155.6	6.59
2009/10	417	130	287	6.18	133.7	5.9	127.8	6.23
2010/11	388	119	269	5.93	140.5	4.5	134.5	6.35
2011/12	554	135	419	5.32	146.7	4.6	140.6	6.53
2012/13	504	177	327	5.32	133.6	4.6	127.6	6.53
2013/14f	407	147	260	5.36	125.0	4.3	119.4	6.58

f=Forecast.

[a] Based on various reports by the Agricultural Attaché, Sao Paulo, Brazil.

[b] Fresh utilization includes NFC for domestic consumption for all seasons and NFC for export prior to 2003/04; thereafter, NFC-for-export, along with FCOJ utilization, is included in processed boxes.

[c] Weighted by utilized round oranges and specialty citrus used in OJ.

Table 5. Comparative orange juice (OJ) production, Brazil and Florida

Season	Brazil[a,b] (July/June)	Florida[c,d] (October/September)	Total
		million SSE gallons	
1999/2000	1,897.0	1,422.4	3,319.4
2000/01	1,690.7	1,357.1	3,047.8
2001/02	1,398.0	1,415.0	2,813.0
2002/03	1,969.4	1,208.1	3,177.5
2003/04	1,602.9	1,448.0	3,050.9
2004/05	2,063.9	911.3	2,975.2
2005/06	1,789.5	923.8	2,713.3
2006/07	2,005.4	816.4	2,821.8
2007/08	2,061.1	1,106.5	3,167.6
2008/09	1,831.3	1,034.8	2,866.1
2009/10	1,772.8	806.3	2,579.1
2010/11	1,594.5	864.0	2,458.5
2011/12	2,228.2	927.5	3,155.7
2012/13	1,740.8	839.2	2,580.0
2013/14f	1,392.6	792.8	2,185.4

f=Forecast.

[a] Based on various reports by the Agricultural Attaché, Sao Paulo, Brazil.

[b] For the 1999/2000 through 2002/03 seasons (includes NFC production for export), OJ production is estimated as boxes utilized for NFC times the FCOJ juice yield (converted to SSE gallons); NFC yield was not reported. For 2003/04 and thereafter, FCOJ plus NFC-for-export production is reported by the Attaché.

[c] Based on data reported by the Florida citrus processors' statistics.

[d] Juice yield times processed utilization (round oranges and specialty citrus).

Table 6. Total Brazil and Florida orange juice (OJ) availability, July/August season

Season	Brazil[a,b]		Florida[c]		Total (Brazil+Florida)			
	Beginning Inventory	Production	Beginning Inventory	Production	Beginning Inventory	Production	Availability	Availability Change[d]
	million SSE gallons		*million SSE gallons*		*million SSE gallons*			*%*
2003/04	334.2	1,602.9	961.0	1,448.0	1,295.2	3,050.9	4,346.1	2.3
2004/05	78.0	2,063.9	1,091.5	911.3	1,169.5	2,975.2	4,144.7	–4.6
2005/06	140.7	1,789.5	867.7	905.4[e]	1,008.4	2,694.9	3,703.3	–10.7
2006/07	25.1	2,005.4	672.8	835.9[e]	697.9	2,841.3	3,539.2	–4.4
2007/08	20.9	2,061.1	576.3	1,106.5	597.2	3,167.6	3,764.7	6.4
2008/09	231.2	1,831.3	857.4	1,034.8	1,088.6	2,866.1	3,954.7	5.0
2009/10	239.5	1,772.8	892.7	806.0	1,132.2	2,578.8	3,711.0	–6.2
2010/11	178.3	1,524.9	779.2	864.0	957.5	2,388.9	3,346.4	–9.8
2011/12	90.5	2,228.2	591.3	927.5	681.8	3,155.7	3,837.5	14.7
2012/13	612.8	1,740.8	658.8	839.2	1,271.6	2,580.0	3,851.6	0.4
2013/14f	635.0	1,392.6	708.0	792.8	1,343.0	2,185.4	3,528.4	–8.4

f=Forecast.

[a] Based on various reports by the Agricultural Attaché, Sao Paulo, Brazil.

[b] Inventory is FCOJ. Production for 2002/03 includes NFC production for export, estimated as boxes utilized for NFC times the FCOJ juice yield (converted to SSE gallons), as an NFC yield was not reported; for 2003/04 and thereafter, production is FCOJ plus NFC-for-export as reported by the Attaché.

[c] Based on data reported by the Florida citrus processors' statistics.

[d] Current versus previous season.

[e] Florida production excludes Florida citrus processors' statistics production in 2005/06 that occurred after July 1, 2006; this amount is included in 2006/07 Florida production.

Table 7. 2013/14 orange juice (OJ) scenarios for Brazil and Florida availability, movement, and ending inventory

Item	2012/13 Season	2013/14 Season		
		Ending-Inventory Scenario		
		Low	Middle	High
Brazil (July/June Season)				
		million SSE gallons		
Beginning Inventory	612.8	635.0	635.0	635.0
Production	1,740.8	1,392.6	1,392.6	1,392.6
Availability	2,353.6	2,027.6	2,027.6	2,027.6
Total Movement	1,718.5	1,782.6	1,739.3	1,696.1
Ending Inventory	635.0	245.0	288.3	331.5
		thousand MT 65° Brix		
Ending Inventory	456.0	175.9	207.0	238.0
		carry-over weeks		
Carryover	19.2	7.1	8.6	10.2
Florida (October/September Season)				
		million SSE gallons		
Beginning Inventory	433.5	523.3	523.3	523.3
Production	839.2	792.8	792.8	792.8
Imports	209.1	112.6	132.5	152.4
Availability	1481.8	1428.7	1448.7	1468.5
Total Movement	958.5	927.4	927.4	927.4
Ending Inventory	523.3	501.3	521.3	541.1
		carry-over weeks		
Carryover	28.4	28.1	29.2	30.3

Source: USDA/FAS, *Brazil Citrus Semi-annual 2013*, GAIN Report No. BR13003, June 18, 2013; FDOC estimate.

Table 8. Brazil and US orange juice (OJ) exports

Item	Season[a]		
	2011/12	2012/13	2013/14f
Brazil[b]		*million SSE gallons*	
NAFTA[c]	216.2	291.3	295.0
Europe[d]	1,142.3	1,142.8	1,157.2
Far East[e]	174.9	146.2	148.0
Others	85.1	77.9	78.8
Total	1,618.5	1,658.2	1,679.1
United States (US)[f]		*million SSE gallons*	
Europe	36.0	39.1	43.0
Canada	87.8	93.0	102.3
Japan	1.3	1.1	1.2
Others	26.7	36.3	39.9
Total	151.8	169.4	186.4

f=Forecast.

[a] Brazil season is July through June (July/June); US season is October through September (October/September).

[b] SECEX: 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 11.60 Brix.

[c] NAFTA includes the United States, Canada, and Mexico.

[d] Europe also includes Russia, Ukraine, and Turkey.

[e] Far East includes China, Japan, Taiwan, Hong Kong,, Macau, South Korea, North Korea, Philippines, and Vietnam.

[f] United States Department of Commerce (USDOC).

Table 9. Forecast availability, movement, and carryover of Florida orange juice (OJ) for 2013/14, and actual for 2011/12 and 2012/[13a,b]

Item	2011/12	2012/13	2013/14f		
			Low[c]	Mid	High[d]
OJ (fresh orange juice)	*million SSE gallons*			*million SSE gallons*	
Beginning Inventory	391.2	433.5	523.3	523.3	523.3
Production[e]	927.5	839.2	792.8	792.8	792.8
Imports[f]	109.3	209.1	132.5	132.5	132.5
Availability	1,428.0	1,481.8	1,448.7	1,448.7	1,448.7
Total Movement	994.5	958.5	881.0	927.4	973.8
Domestic	902.2	865.6	783.2	824.4	865.6
Export	92.3	92.9	97.9	103.0	108.2
Ending Inventory	433.5	523.3	567.7	521.3	474.9
	weeks supply			*weeks supply*	
Carryover	22.7	28.4	33.5	29.2	25.4

f=Forecast.

[a] Based on data reported by Florida citrus processors' statistics; October/September season.

[b] 52-week season.

[c] Movement 4% less than middle scenario.

[d] Movement 4% more than middle scenario.

[e] Includes production by Florida citrus processors' statistics members and an estimate of other Florida production by non-members.

[f] Foreign and domestic, reprocessed tangerine juice, net loss/gain during reprocessing, and adjustments.

Table 10. Forecast availability, movement, and carryover of Florida FCOJ for 2013/14, and actual for 2010/11 through 2012/13

Item	2010/11	2011/12	2012/13	2013/14f
FCOJ (frozen concentrated)		*million 42° Brix gallons*		
Beginning Inventory	95.0	51.6	61.1	76.9
Pack[a]	82.1	106.4	76.1	67.3
Imports & Other Supplies[b]	23.0	27.3	48.0	30.6
Total FCOJ Availability	200.1	185.4	185.3	147.8
Total FCOJ Movement	148.5	124.3	108.4	105.9
By Form				
Retail	9.4	7.5	6.8	6.6
Institutional	17.4	16.8	16.7	16.2
Bulk	121.7	100.0	84.9	83.1
By Market				
Domestic	120.0	108.9	91.2	88.4
Export	28.5	15.3	17.3	17.5
Ending Inventory	51.6	61.1	76.9	68.9
		million SSE gallons		
Ending Inventory	208.5	247.0	310.5	278.1
		weeks supply		
Carryover	18.1	25.6	36.9	33.8

f=Forecast.

Source: Florida citrus processors' statistics.

[a] Includes pack from specialty fruit.

[b] Domestic receipts by members of non-Florida products; Florida product received by members from non-members; foreign imports; reprocessed frozen concentrated tangerine juice; chilled OJ used in FCOJ, net loss or gain during reprocessing; and adjustments.

Table 11. Forecast availability, movement, and carryover of Florida COJ for 2013/14, and actual for 2010/11 through 2012/13[a]

Item	2010/11	2011/12	2012/13	2013/14f
COJ (chilled orange juice)		*million SSE gallons*		
Beginning Inventory	164.8	182.7	186.6	213.1
Pack From Fruit[b]	545.5	505.0	524.1	528.3
Pack From FCOJ	19.9	19.0	24.5	19.0
Total COJ Availability	730.2	706.8	735.2	760.4
Total COJ Movement	547.5	520.2	522.1	528.7
By Form				
NFC	527.6	501.2	497.6	500.7
RECON[c]	19.9	19.0	24.5	19.0
NFC By Market				
Domestic NFC	483.9	460.6	469.6	472.6
Export NFC	37.5	30.3	22.9	32.1
Ending Inventory	182.7	186.6	213.1	231.7
Bulk Ending Inventory[d]	177.0	178.8	206.6	236.9
		weeks supply		
Bulk Carryover[d]	17.4	18.6	21.6	24.6

f=Forecast.

Source: Florida citrus processors' statistics.

[a] Availability, movement, and inventory adjusted by Florida Citrus processors' statistics to 11.8° Brix gallons.

[b] Includes supplies from non-member sources and adjustments.

[c] Assumes RECON movement equals pack from FCOJ.

[d] Assumes bulk inventories are NFC.

Table 12. US orange juice (OJ) supply and presumed consumption

Season	Beginning Inventory	Florida Production	Other US Production	United States		Ending Inventory	Presumed Consumption	
				Imports	Exports		Total	Per Capita
			million SSE gallons					*gallons*
2000/01	618	1,357	42	258	123	670	1,482	5.2
2001/02	670	1,415	32	189	181	666	1,460	5.1
2002/03	666	1,208	53	291	105	681	1,433	4.9
2003/04[a]	681	1,448	28	222	123	815	1,440	4.9
2004/05[b,c]	853	911	67	358	119	675	1,394	4.7
2005/06[b,c]	675	924	72	299	138	492	1,340	4.5
2006/07[b,c]	492	816	80	399	123	406	1,259	4.2
2007/08[b,c]	406	1,106	64	406	139	680	1,163	3.8
2008/09[a,b,c]	680	1,035	32	317	125	722	1,217	4.0
2009/10[b,c]	713	806	41	328	147	588	1,153	3.7
2010/11[b,c]	588	864	56	265	214	422	1,138	3.7
2011/12[b,c]	422	928	39	223	152	463	996	3.2
2012/13[b,c]	464	839	30	421	169	539	1,045	3.3
2013/14f[b,c]	539	793	40	281	186	547	919	2.9

f=Forecast.

[a] Florida ending inventories for the 52nd week of a 53-week season.

[b] 2004/05 and thereafter Florida bulk NFC inventory and production adjusted by Florida citrus processors' statistics (FCPS) to 11.8° Brix gallons.

[c] Based on FCOJ inventories for the United States (NASS, Cold Storage Reports) plus Florida COJ inventories (FCPS); in 2003/04 and prior years based on Florida FCOJ and COJ inventories.

Table 13. Retail orange juice (OJ) sales in grocery stores $2 million+, Walmart discount stores and supercenters, mass merchandisers, club stores, dollar stores, drug stores $1 million+, and military DECA

Season	FCOJ	NFC	RECON	Other	Total
			Volume		
			million SSE gallons		
2006/07	54.6	332.0	258.0	5.8	650.4
2007/08	49.3	323.3	245.3	5.8	623.7
2008/09	45.2	314.5	263.6	5.3	628.6
2009/10	37.3	307.6	259.9	3.2	608.1
2010/11[b]	37.1	326.0	250.3	2.8	616.1
2011/12[b]	31.9	315.5	220.1	1.9	569.4
2012/13[a,b]	27.5	319.1	215.1	1.5	563.2
2013/14f[a,b]					
Low Price	24.9	340.0	219.0	1.3	585.2
Mid Price	23.9	321.1	211.2	1.2	557.5
High Price	23.0	303.8	204.0	1.2	532.0
			Price		
			$ per SSE gallon		
2006/07	4.36	6.50	4.98	6.25	5.71
2007/08	4.67	6.73	5.05	6.60	5.91
2008/09	4.66	6.61	4.56	6.74	5.61
2009/10	4.57	6.53	4.41	6.95	5.51
2010/11[b]	4.59	6.84	4.82	7.42	5.89
2011/12[b]	4.75	7.18	5.05	8.33	6.23
2012/13[a,b]	4.77	7.25	4.82	8.74	6.20
2013/14f[a,b]					
Low Price	4.67	7.14	4.68	8.82	6.11
Mid Price	4.82	7.36	4.82	9.09	6.29
High Price	4.96	7.58	4.96	9.36	6.47

f=Forecast.

[a] Based on an analysis of trends; does not imply minimum pricing or FDOC staff opinion on optimal pricing.

[b] Based on the new Nielsen retail universe expanded all outlets combined.

Table 14. Orange juice (OJ) and grapefruit juice (GF) prices

Item	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14f
Orange Juice									
Florida Grower[a]					*$ per pounds solids*				
Early-Mids.	1.16	1.82	1.34	1.21	1.36	1.59	1.82	1.37[b]	1.40–0.60
Valencia	1.33	2.06	1.43	1.34	1.58	1.88	2.00	1.65[b]	1.66–1.86
Total	1.26	1.85	1.39	1.28	1.47	1.74	1.92	1.52[b]	1.56–0.76
FOB bulk FCOJ[c]	1.52	2.08	1.45	0.94	1.43	NA	NA	NA	NA
					$ per metric ton				
Rotterdam FCOJ[d]	1,766	2,513	1,900	1,260	2,058	2,590	2,588	2,340	2,485
Nielsen Retail[e,f]					*$ per gallon*				
FCOJ	3.48	4.36	4.67	4.66	4.57	4.59	4.75	4.77[b]	4.67–4.96
NFC	5.45	6.50	6.73	6.61	6.53	6.84	7.18	7.25[b]	7.14–7.58
RECON	3.98	4.98	5.05	4.56	4.41	4.82	5.05	4.82[b]	4.68–4.96
Total	4.69	5.71	5.91	5.61	5.51	5.89	6.23	6.20[b]	6.11–6.47
Grapefruit Juice									
Florida Grower[a]					*$ per pounds solids*				
White Grft	1.76	0.71	0.60	0.70	1.12	1.21	1.45	1.37[b]	1.35–1.55
Red Grft	1.52	0.88	0.68	0.77	1.17	1.32	1.57	1.04[b]	1.00–1.20
Total	1.62	0.80	0.65	0.74	1.15	1.28	1.52	1.17[b]	1.27–1.44
Nielsen Retail[e,f]					*$ per gallon*				
FCGJ	3.37	4.03	4.14	4.26	4.48	4.53	4.50	4.46[b]	4.29–4.56
NFC	7.02	6.95	6.91	6.74	6.66	6.98	7.30	7.53[b]	7.59–8.06
RECON	5.50	4.86	4.59	4.33	4.92	5.55	5.86	6.09[b]	6.20–6.58
Shelf Stable	5.95	5.97	6.05	6.03	6.03	5.80	5.77	5.98[b]	5.97–6.34
Total	6.25	6.30	6.42	6.32	6.34	6.50	6.70	6.89[b]	6.92–7.35

f=Forecast. Based on analysis of trends; does not imply minimum pricing or FDOC staff opinion on optimal pricing.

[a] Packinghouse door or delivered-in price reported by the NASS in *Citrus Fruits, 2013 Summary, 2009–2013*, and previous issues. Estimate for 2013/14 is a weighted average of priced and non-priced fruit (spot, long-term, cooperative, processor owned, etc.).

[b] Preliminary.

[c] Florida Citrus Mutual.

[d] *Foodnews:* unweighted average of monthly prices, October through September.

[e] Reflects actual price paid after discounts (coupons, sales, etc.).

[f] From 2005/06, based on scanner data for $2 million plus stores + mass merchandisers (K-Mart & Target) + $1 million plus drug stores, plus Nielsen household-panel-based estimates for Walmart discount stores and supercenters; from 2010/11 season onward, based on the Expanded All Outlets Combined (xAOC) retail universe.

Table 15. Utilization of Florida grapefruit

Season	Volume						
	Fresh	FCGJ	CGJ	Non-Certified	Other[a]	Total Utilized[b]	Abandonment
	million 85-pound boxes						
2000/01	15.9	21.2	6.4	1.6	0.9	46.0	2.0
2001/02	15.9	21.7	6.4	1.5	1.2	46.7	0.0
2002/03	14.1	16.0	6.2	1.5	0.9	38.7	0.0
2003/04	15.2	17.2	6.6	1.5	0.4	40.9	0.0
2004/05	6.7	2.5	2.8	0.7	0.2	12.8	0.0
2005/06	6.2	8.0	4.1	0.7	0.3	19.3	0.0
2006/07	10.3	11.6	4.4	0.6	0.3	27.2	0.0
2007/08	9.9	10.4	5.2	0.7	0.3	26.6	0.0
2008/09	8.7	8.4	3.7	0.7	0.2	21.7	0.0
2009/10	8.7	6.0	4.6	0.6	0.3	20.3	0.0
2010/11	7.7	7.0	4.2	0.7	0.2	19.8	0.0
2011/12	7.2	6.9	3.8	0.7	0.2	18.9	0.0
2012/13	7.1	6.1	4.2	0.7	0.3	18.4	0.0
2013/14f	6.9	5.8	4.1	0.7	0.3	17.8	0.0

f=Forecast.

[a] Includes CSSGJ, blends, and utilization by non-members of the Florida citrus processors' statistics.

[b] Numbering may be off due to rounding.

Table 16. Destination markets for Florida fresh grapefruit

Season (August/ July)	Domestic	Exports				Total[b]	
		Canada	Europe[a]	Far East	Total Exports[b]		
		million 42.5-pound cartons				*million 85-lb box equivalent*	
1999/2000	13.2	2.3	6.7	11.8	20.8	33.9	17.0
2000/01	11.6	2.2	6.6	11.4	20.2	31.9	15.9
2001/02	11.1	2.2	6.6	11.9	20.7	31.8	15.9
2002/03	9.9	1.6	6.2	10.5	18.3	28.3	14.1
2003/04	9.0	1.8	6.9	12.7	21.4	30.4	15.2
2004/05	4.9	0.8	2.8	5.0	8.5	13.4	6.7
2005/06	4.8	0.8	2.1	4.8	7.7	12.5	6.2
2006/07	6.8	1.3	4.4	8.2	13.9	20.6	10.3
2007/08	6.2	1.2	5.0	7.5	13.6	19.8	9.9
2008/09	6.0	1.1	3.9	6.3	11.3	17.4	8.7
2009/10	6.1	1.2	3.5	6.7	11.3	17.4	8.7
2010/11	5.4	1.1	3.1	5.8	10.1	15.5	7.7
2011/12	5.5	1.0	2.8	5.2	9.0	14.5	7.2
2012-13	6.0	1.1	2.9	4.3	8.3	14.3	7.1
2013-14f	5.3	1.0	2.8	4.8	8.5	13.8	6.9

f=Forecast.

Historical Source: Division of Fruit and Vegetable Inspection Service, Florida Department of Agriculture.

[a] Includes some offshore exports not destined for Europe.

Table 17. Forecast availability, movement, and carryover of Florida FCGJ and CGJ for 2013/14, and actual for 2011/12 and 2012/13

Item	2011/12	2012/13	2013/14f
FCGJ (frozen concentrated grapefruit juice)		*million 40° Brix gallons*	
Beginning Inventory	4.7	5.6	5.3
Pack[a]	9.4	8.1	7.1
Total FCGJ Availability	14.1	13.8	12.4
Movement	8.4	8.5	7.6
Ending Inventory	5.6	5.3	4.7
		million SSE gallons[b]	
Ending Inventory	22.5	21.1	19.0
		weeks supply	
Carryover	34.8	32.2	32.3
CGJ[c] (chilled grapefruit juice)		*million SSE gallons*	
Beginning Inventory	14.3	14.0	12.9
Pack from Fruit[a]	22.8	23.5	23.0
Pack from FCGJ[d]	0.8	1.4	0.7
Total CGJ Availability	37.9	39.0	36.7
Movement – NFC	23.1	24.6	21.4
Movement – RECON[d,e]	0.8	1.4	0.7
Total CGJ Movement	23.9	26.0	22.2
Ending Inventory	14.0	12.9	14.6
Bulk Ending Inventory	13.7	12.6	14.3
		weeks supply	
Bulk Carryover[f]	30.8	26.8	34.5
TOTAL GJ (grapefruit juice)		*million SSE gallons*[b]	
Beginning Inventory	33.1	36.6	34.0
Production[a]	60.4	51.0	49.4
Total GJ Availability	93.5	87.5	83.4
Movement – Domestic	35.3	32.7	30.7
Movement – Export	21.7	20.8	19.2
Total GJ Movement	56.9	53.5	49.9
Ending Inventory	36.6	34.0	33.5
		weeks supply	
Carryover	33.4	33.1	34.9

f=Forecast.

Source: Florida citrus processors' statistics.

[a] Includes miscellaneous supplies from non-member sources and adjustments.

[b] Assumes one gallon of 40° Brix FCGJ equals four 10.0° SSE gallons.

Availability, movement and inventory adjusted by FCPS to 10.0° Brix gallons.

[d] Rounds to zero.

[e] Assumes RECON movement equals pack from FCGJ.

[f] Assumes bulk inventories are NFC.

Table 18. US grapefruit juice (GJ) exports[a]

Season (October/September)	Europe	Canada	Japan	Other	Total	FDOC Exports
			million SSE gallons			
2000/01	22.7	3.1	11.1	2.2	39.0	37.5
2001/02	21.0	3.1	10.8	1.4	36.3	31.0
2002/03	20.0	3.3	12.8	2.2	38.3	39.5
2003/04	21.5	3.4	15.9	1.6	42.3	55.5
2004/05	8.5	3.2	10.0	2.2	23.9	22.0
2005/06	10.4	3.1	3.7	1.6	18.7	16.7
2006/07	10.4	2.4	5.6	1.8	20.2	37.2
2007/08	7.5	2.8	4.3	1.5	16.1	36.4
2008/09	8.4	2.6	2.5	2.1	15.6	33.9
2009/10	5.1	2.3	4.3	1.1	12.8	22.7
2010/11	6.0	2.1	6.1	1.6	15.8	29.7
2011/12	5.6	2.0	5.1	2.6	15.2	21.7
2012/13	6.2	2.0	4.3	2.3	14.8	20.8
2013/14f	5.6	2.0	4.0	1.7	13.3	18.2

F=Forecast.

[a] United States Department of Commerce (USDOC).

Table 19. US grapefruit juice (GJ) supply and presumed consumption

Season	Florida		Other US Production	United States		Florida Ending Inventory	Presumed Consumption	
	Beginning Inventory	Production		Imports[b]	Exports[b]		Total	Per Capita
			million SSE gallons					*gallons*
2000/01	75.8	146.6	17.8	0.9	39.0	76.5	125.5	0.44
2001/02	76.5	149.1	11.9	0.3	36.3	88.1	113.5	0.40
2002/03	88.1	114.8	13.2	0.4	39.5[c]	74.3	102.8	0.35
2003/04[d]	74.3	120.3	13.0	0.5	55.5[c]	67.6	85.0	0.29
2004/05[e]	65.0	29.1	18.7	11.4	23.9	33.1	67.2	0.23
2005/06[e]	33.1	62.2	11.6	5.6	18.7	41.0	52.8	0.18
2006/07[e]	41.0	91.1	19.5	0.9	37.2[c]	56.9	58.6	0.19
2007/08[e]	56.9	87.7	13.0	0.3	36.4[c]	59.3	62.2	0.20
2008/09[d,e]	59.3	66.2	11.1	0.5	33.9[c]	46.6	56.5	0.18
2009/10[e]	45.7	61.1	11.0	0.6	22.7[c]	42.1	53.6	0.17
2010/11[e]	42.1	62.4	14.0	0.4	29.7[c]	33.1	56.0	0.18
2011/12[e]	33.1	60.6	10.6	0.5	21.7	36.6	46.6	0.15
2012/13[e]	36.6	54.5	14.9	0.8	20.8	34.0	51.9	0.16
2013/14f[e]	34.0	53.0	12.7	0.7	18.2	31.5	50.6	0.16

f=Forecast.

[a] Estimated as US production plus imports minus exports plus beginning Florida inventory minus ending Florida inventory.

[b] USDOC, except for exports in 2002/03 and 2003/04, and 2006/07 through 2010/11.

[c] FDOC processor statistics reporting exports which exceeded the volume reported by the USDOC.

[d] Ending inventories for the 52nd week of an annual season.

[e] 2004/05 and thereafter Florida bulk NFC inventory and production adjusted by FCPS to 10.0° ° Brix gallons.

Table 20. Retail grapefruit juice (GJ) sales in grocery stores $2 million+, Walmart discount stores and supercenters, mass merchandisers, club stores, dollar stores, drug stores $1 million+, and military DECA

Season	FCGJ	Refrigerated NFC	Refrigerated RECON	Shelf Stable	Total
			Volume		
			million SSE gallons		
2007/08	0.9	12.6	0.7	7.7	21.8
2008/09	0.8	12.3	0.7	7.3	21.1
2009/10	0.5	12.3	0.7	6.7	20.1
2010/11[b]	0.5	12.6	0.6	6.5	20.2
2011/12[b]	0.4	11.5	0.6	6.0	18.6
2012/13[b]	0.4	10.6	1.0	5.6	17.6
2013/14f[b]					
Low Price	0.4	10.0	1.0	5.3	16.6
Mid Price	0.4	9.7	0.9	5.1	16.1
High Price	0.3	9.5	0.9	5.0	15.7
			Price		
			$ per SSE gallon		
2007/08	4.14	6.91	4.59	6.05	6.42
2008/09	4.26	6.74	4.33	6.03	6.32
2009/10	4.48	6.66	4.92	6.03	6.34
2010/11[b]	4.53	6.98	5.55	5.80	6.50
2011/12[b]	4.50	7.30	5.86	5.77	6.70
2012/13[b]	4.46	7.53	6.09	5.98	6.89
2013/14f[b]					
Low Price	4.29	7.59	6.20	5.97	6.92
Mid Price	4.42	7.82	6.39	6.16	7.14
High Price	4.56	8.06	6.58	6.34	7.35

f=Forecast.

[a] Based on an analysis of trends; does not imply minimum pricing or FDOC staff opinion on optimal pricing.

[b] From 2007/08, based on scanner data for $2 million plus stores + mass merchandisers (K-Mart & Target) + $1 million plus drug stores, plus Nielsen household-panel-based estimates for Walmart discount stores and supercenters; from 2010/11 season onward, based on the expanded all outlets combined (xAOC) retail universe.

Table 21. Specialty citrus utilization

Item/Season	Fresh	Processed	Non-Certified	Total
		million boxes		
Tangelo				
2007/08	0.36	1.07	0.07	1.50
2008/09	0.41	0.65	0.09	1.15
2009/10	0.32	0.49	0.10	0.90
2010/11	0.34	0.71	0.10	1.15
2011/12	0.34	0.72	0.10	1.15
2012/13	0.39	0.53	0.08	1.00
2013/14f	0.39	0.53	0.08	1.00
Tangerine[a]				
2007/08	3.04	2.22	0.24	5.50
2008/09	2.58	1.01	0.26	3.85
2009/10	2.73	1.44	0.28	4.45
2010/11	2.71	1.64	0.30	4.65
2011/12	2.55	1.45	0.29	4.29
2012/13	1.98	1.07	0.23	3.28
2013/14f	2.27	1.22	0.26	3.75
Total				
2007/08	3.40	3.29	0.31	7.00
2008/09	2.99	1.66	0.35	5.00
2009/10	3.05	1.92	0.38	5.35
2010/11	3.05	2.35	0.40	5.80
2011/12	2.89	2.17	0.39	5.44
2012/13	2.38	1.60	0.31	4.28
2013/14f	2.66	1.75	0.34	4.75

f=Forecast.

[a] Processed boxes are utilized for FCOJ, except some tangerines utilized to produce tangerine juice.

Table 22. Estimated 2013/14 Florida fresh and processed on-tree revenues[a]

Item	FOB Price	Packing Costs[b,c]		Delivered-In Price	Pick & Haul Costs[d]	On-Tree Price
		$ per carton			*$ per box*	
FRESH (100% Pack Out)						
Oranges						
Navel	14.72	5.60	9.12	18.24	2.60	15.64
Early & Mid	13.25	5.60	7.65	15.30	2.60	12.70
Valencia	12.68	5.60	7.08	14.16	2.80	11.36
Grapefruit[e]						
White	12.88	5.48	7.40	14.80	2.20	12.60
Red	12.02	5.38	6.64	13.28	2.25	11.03
Specialty						
Tangelo	15.99	5.83	10.16	20.32	2.75	17.57
Early Tangerine	17.89	6.70	11.19	22.37	3.55	18.82
Honey Tangerine	18.91	6.70	12.21	24.42	3.55	20.87
PROCESSED				*$/PS*[f]		
Oranges						
Early/Mid (6.19 PS/box)[g]		Low:	1.40	8.38	2.50	5.88
		Mid:	1.50	8.97	2.50	6.47
		High:	1.60	9.57	2.50	7.07
Valencia (7.01 PS/box)[g]		Low:	1.66	11.30	2.70	8.60
		Mid:	1.76	11.98	2.70	9.28
		High:	1.86	12.66	2.70	9.96
Grapefruit[h]						
White (5.08 PS/box)[g]		Low:	1.35	6.85	2.88	3.97
		Mid:	1.45	7.36	2.88	4.48
		High:	1.55	7.87	2.88	4.99
Red (5.08 PS/box)[g]		Low:	1.00	5.08	2.99	2.09
		Mid:	1.10	5.58	2.99	2.60
		High:	1.20	6.09	2.99	3.10

[a] Based on analysis of trends; does not imply minimum pricing or FDOC staff opinion on optimal pricing.

[b] Includes FDOC tax.

[c] State averages based on FOB/PHD (packinghouse door) price differences reported by the USDA/NASS in *Citrus Fruits 2013 Summary, 2009–2013*; and estimates by UF/IFAS CREC (http://www.crec.ifas.ufl.edu/Extension/Economics
).

[d] See footnote b above; pick-and-haul cost is the difference between PHD and on-tree prices.

[e] Weighted average domestic-export FOB prices and packing costs.

[f] Net of FDOC assessment.

[g] Test house.

[h] Grapefruit pick-and-haul costs are a weighted average of costs for field-run fruit and packinghouse eliminations; assumes an elimination charge of $1.20 per box.

Table 23. On-tree returns for Florida citrus

Variety	2011/12			2012/13p			2013/14f		
	Fresh	Processing	Total[b]	Fresh	Processing	Total[b]	Fresh	Processing	Total[b]
					million dollars				
Oranges									
Early, Mids & Navels	41.4	617.8	659.2	43.8	353.8	397.6	42.8	353.1	395.9
Valencias	22.0	774.5	796.6	21.6	532.6	554.2	29.5	596.2	625.7
All Oranges	63.4	1392.3	1455.7	65.4	888.4	951.8	72.3	949.3	1021.6
Grapefruit									
White Seedless	13.8	19.2	33.0	12.4	15.4	27.8	13.9	16.6	30.4
Colored Seedless	70.5	31.7	102.2	73.0	10.3	83.3	71.7	16.9	88.6
All Grapefruit	84.4	50.9	135.2	85.4	25.8	111.1	85.5	33.5	119.0
Specialty									
Early Tangerines	14.4	3.1	17.4	23.5	0.5	24.0	28.2	1.2	29.5
Honey Tangerines	16.5	4.4	20.9	18.0	1.4	19.5	21.5	2.1	23.6
All Tangerines	31.1	7.3	38.4	41.5	1.9	43.4			
Tangelos	6.0	5.2	11.1	8.0	2.3	10.2	8.3	1.6	9.8
All Specialty	37.0	12.5	49.5	49.4	4.2	53.6	58.0	4.9	62.9
Total Citrus	184.8	1455.7	1640.4	200.2	918.4	1116.5	215.9	987.6	1203.5

f=Forecast.

Historical Source: Florida Agricultural Statistics Service (FASS).

[a] Based on an analysis of trends; does not imply minimum pricing or FDOC staff opinion on optimal pricing.

[b] May not add up due to rounding.

Table 24. Estimated 2013/14 on-tree prices for eliminations, packinghouses, and selected catergories

Item	Unit	Navels	Early/Mid	Valencia	All Oranges	White	Red	All Grapefruit	Tangelos	Early	Honey	All Specialty
Certified Fresh												
FOB Price	*$/box*	29.44	26.50	25.36	26.66	25.76	24.04	24.26	31.98	35.77	37.82	35.94
Packing Cost	*$/box*	11.20	11.20	11.20	11.20	10.96	10.76	10.79	11.66	13.40	13.40	13.13
Pick & Haul Cost	*$/box*	2.60	2.60	2.80	2.69	2.20	2.25	2.24	2.75	3.55	3.55	3.42
On-Tree Price	*$/box*	15.64	12.70	11.36	12.76	12.60	11.03	11.23	17.57	18.82	20.87	19.39
Volume	*Mln boxes*	1.10	1.00	2.20	4.30	0.90	6.00	6.90	0.39	1.30	0.97	2.66
On-Tree Revenue	*Mln. $*	17.20	12.70	24.99	54.88	11.34	66.17	77.50	6.85	24.47	20.29	51.61
Processed Eliminations												
$/PS	*$/PS*	0.90	1.50	1.76	1.55	1.45	1.10	1.22	1.18	1.18	1.18	1.18
PS/Box (Test House)	*PS/box*	5.68	5.98	6.80	6.36	5.08	5.08	5.08	5.40	5.72	6.10	5.75
Delivered-In Price	*$/box*	5.12	8.97	11.98	9.87	7.36	5.58	6.21	6.34	6.72	7.17	6.75
Pick & Haul Cost	*$/box*	2.60	2.60	2.80	2.69	2.20	2.25	2.24	2.75	3.55	3.55	3.34
Elimination Cost	*$/box*	1.20	1.20	1.20	1.20	1.20	1.20	1.20	1.20	1.20	1.20	1.20
On-Tree Price	*$/box*	1.32	5.17	7.98	5.98	3.96	2.13	2.76	2.39	1.97	2.42	2.22
Volume	*Mln boxes*	0.31	0.54	0.94	1.79	2.10	4.00	6.10	0.26	0.43	0.29	0.98
On-Tree Revenue	*Mln $*	0.41	2.79	7.52	10.72	8.32	8.54	16.86	0.62	0.85	0.70	2.18
Cert. Fresh+Proc. Elim.												
On-Tree Price	*$/box*	12.48	10.06	10.34	10.77	6.55	7.47	7.26	11.50	14.61	16.63	14.75
Volume	*Mln boxes*	1.41	1.54	3.14	6.09	3.00	10.00	13.00	0.65	1.73	1.26	3.65
On-Tree Revenue	*Mln $*	17.61	15.48	32.51	65.60	19.65	74.71	94.36	7.47	25.32	20.99	53.79
Non-Certified Fresh												
On-Tree Price	*$/box*	15.64	12.70	11.36	13.41	12.60	11.03	11.48	17.57	18.82	20.87	18.89
Volume	*Mln boxes*	0.50	0.40	0.40	1.30	0.20	0.50	0.70	0.08	0.20	0.06	0.34
On-Tree Revenue	*Mln $*	7.82	5.08	4.54	17.44	2.52	5.51	8.03	1.41	3.76	1.25	6.42
Field-Run Processed												
Delivered-In Price	*$/box*	5.12	8.97	11.98	10.59	7.36	5.58	6.28	6.34	6.72	7.17	6.81
Pick & Haul Cost	*$/box*	2.50	2.50	2.70	2.61	2.20	2.25	2.23	2.75	3.55	3.55	3.27
On-Tree Price	*$/box*	2.62	6.47	9.28	7.98	5.16	3.33	4.05	3.59	3.17	3.62	3.54
Volume	*Mln boxes*	0.19	53.96	63.46	117.61	1.60	2.50	4.10	0.27	0.12	0.38	0.76
On-Tree Revenue	*Mln $*	0.50	349.38	588.68	938.55	8.26	8.34	16.60	0.97	0.37	1.37	2.71
Total Fresh & Processed												
On-Tree Price	*$/box*	12.34	6.62	9.34	8.17	6.34	6.81	6.68	9.85	14.37	13.89	13.25
Volume	*Mln boxes*	2.10	55.90	67.00	125.00	4.80	13.00	17.80	1.00	2.05	1.70	4.75
On-Tree Revenue	*Mln $*	25.92	369.94	625.73	1021.59	30.43	88.56	118.99	9.85	29.46	23.61	62.92