


Retail Sales Trends



*Report # 7 of the 2019-20 Season
Period Ending 04/11/2020*

Florida Department of Citrus
Economic and Market Research
Department

2020



This EMRD report provides the retail sales trends of orange juice, orange juice blends, and grapefruit juice for the period ending 4/11/2020.

Source of data: Nielsen. xAOC = Expanded All Outlets Combined. xAOC data consists of POS data for U.S. grocery stores doing \$2 million and greater annual sales, drug stores doing \$1 million and greater annual sales, mass merchandisers (like Target), Walmart, club (Sam's and BJ's), dollar stores (Dollar General, Family Dollar and Fred's), and military/DECA.



Quick Topline



Total xAOC – 4 Weeks ending 4/11/20

**TOTAL US - XAOC
4 WEEKS ENDING
04/11/20**

	Gallons			Dollars			Price per EQ Gallon		
	4 Weeks YA	4 Weeks	% Chg	4 Weeks YA	4 Weeks	% Chg	4 Weeks YA	4 Weeks	% Chg
TL OJ	30,258,180	44,049,710	45.58%	\$211,368,670	\$318,496,696	50.68%	\$6.99	\$7.23	3.51%
TL OJ REF NFC	17,400,152	26,046,903	49.69%	\$146,609,819	\$226,640,874	54.59%	\$8.43	\$8.70	3.27%
NFC <11oz	201,409	212,580	5.55%	\$2,433,571	\$2,659,662	9.29%	\$12.08	\$12.51	3.55%
NFC 11-20oz	553,605	531,275	-4.03%	\$8,538,793	\$8,361,237	-2.08%	\$15.42	\$15.74	2.04%
NFC 20-50oz	130,194	171,191	31.49%	\$1,880,917	\$2,751,646	46.29%	\$14.45	\$16.07	11.26%
NFC 50-70oz	11,185,349	17,329,611	54.93%	\$90,909,850	\$148,216,623	63.04%	\$8.13	\$8.55	5.23%
NFC 70-110oz	4,539,346	6,658,118	46.68%	\$37,519,986	\$56,819,414	51.44%	\$8.27	\$8.53	3.25%
NFC >110oz	790,249	1,144,128	44.78%	\$5,326,704	\$7,832,293	47.04%	\$6.74	\$6.85	1.56%
TL OJ REF RECON	10,721,973	14,511,498	35.34%	\$51,752,753	\$71,230,006	37.64%	\$4.83	\$4.91	1.69%
TL GJ	908,317	1,137,293	25.21%	\$7,517,535	\$9,940,148	32.23%	\$8.28	\$8.74	5.60%

Total xAOC - SYTD

TOTAL US - XAOC
Season Year to Date

	Gallons			Dollars			Price per EQ Gallon		
	SYTD 2018-19	SYTD 2019-20	% Chg	SYTD 2018-19	SYTD 2019-20	% Chg	SYTD 2018-19	SYTD 2019-20	% Chg
TL OJ	222,483,793	236,036,624	6.09%	\$1,557,226,816	\$1,669,955,677	7.24%	\$7.00	\$7.07	1.08%
TL OJ REF NFC	131,517,811	139,120,340	5.78%	\$1,092,785,860	\$1,180,972,031	8.07%	\$8.31	\$8.49	2.16%
NFC <11oz	1,433,034	1,382,753	-3.51%	\$17,102,033	\$16,776,686	-1.90%	\$11.93	\$12.13	1.66%
NFC 11-20oz	3,825,323	3,911,862	2.26%	\$59,267,961	\$60,477,071	2.04%	\$15.49	\$15.46	-0.22%
NFC 20-50oz	995,518	1,037,991	4.27%	\$14,047,035	\$16,114,438	14.72%	\$14.11	\$15.52	10.02%
NFC 50-70oz	85,671,353	90,558,372	5.70%	\$684,661,275	\$745,087,703	8.83%	\$7.99	\$8.23	2.95%
NFC 70-110oz	33,642,389	36,186,605	7.56%	\$278,093,191	\$301,922,500	8.57%	\$8.27	\$8.34	0.94%
NFC >110oz	5,950,193	6,042,764	1.56%	\$39,614,365	\$40,593,640	2.47%	\$6.66	\$6.72	0.90%
TL OJ REF RECON	75,195,603	80,308,543	6.80%	\$368,722,954	\$390,032,865	5.78%	\$4.90	\$4.86	-0.96%
TL GJ	6,376,375	6,308,261	-1.07%	\$51,295,366	\$53,619,807	4.53%	\$8.04	\$8.50	5.66%

Orange Juice Prices

- The scanner data as reported in the Nielsen Topline Report for period ending 04/11/2020 is preliminary. The Nielsen Topline report provides year-over-year (YOY) and season-to-date (STD) data.
- Average YOY Total OJ price increased by 3.5% to \$7.23 per equivalent gallon.
 - Average YOY NFC price increased by 3.27% to \$8.70 per equivalent gallon.
 - Average YOY Recon price increased by 1.69% to \$4.91 per equivalent gallon.
- Average STD Total OJ price increased by 1.1% from \$7.00 to \$7.07 per equivalent gallon, largely associated with increase in the average NFC price for the year.
 - Average STD NFC price increased by 2.16% from \$8.31 to \$8.49 per equivalent gallon.
 - Average STD Recon price decreased by 0.96% from \$4.90 to \$4.86 per equivalent gallon.

Orange Juice Volume

- The scanner data as reported in the Nielsen Topline Report for period ending 04/11/2020 is preliminary. The Nielsen Topline report provides year-over-year (YOY) and season-to-date (STD) data.
- Average YOY Total OJ sales increased by 46% to 44.05 million equivalent gallons.
 - Average YOY NFC sales increased by 50% (or an additional 8.6 million equivalent gallons).
 - Average YOY Recon sales increased by 35% (or an additional 3.8 million equivalent gallons).
- Average Total OJ sales for the season since October 2019 are up by 6% with 236 million equivalent gallons.
 - Average STD NFC sales increased by 5.78% with 139 million equivalent gallons sold since October 2019.
 - Average STD Recon sales increased by 6.80% with 80 million equivalent gallons sold since October 2019.

Container Size Categories

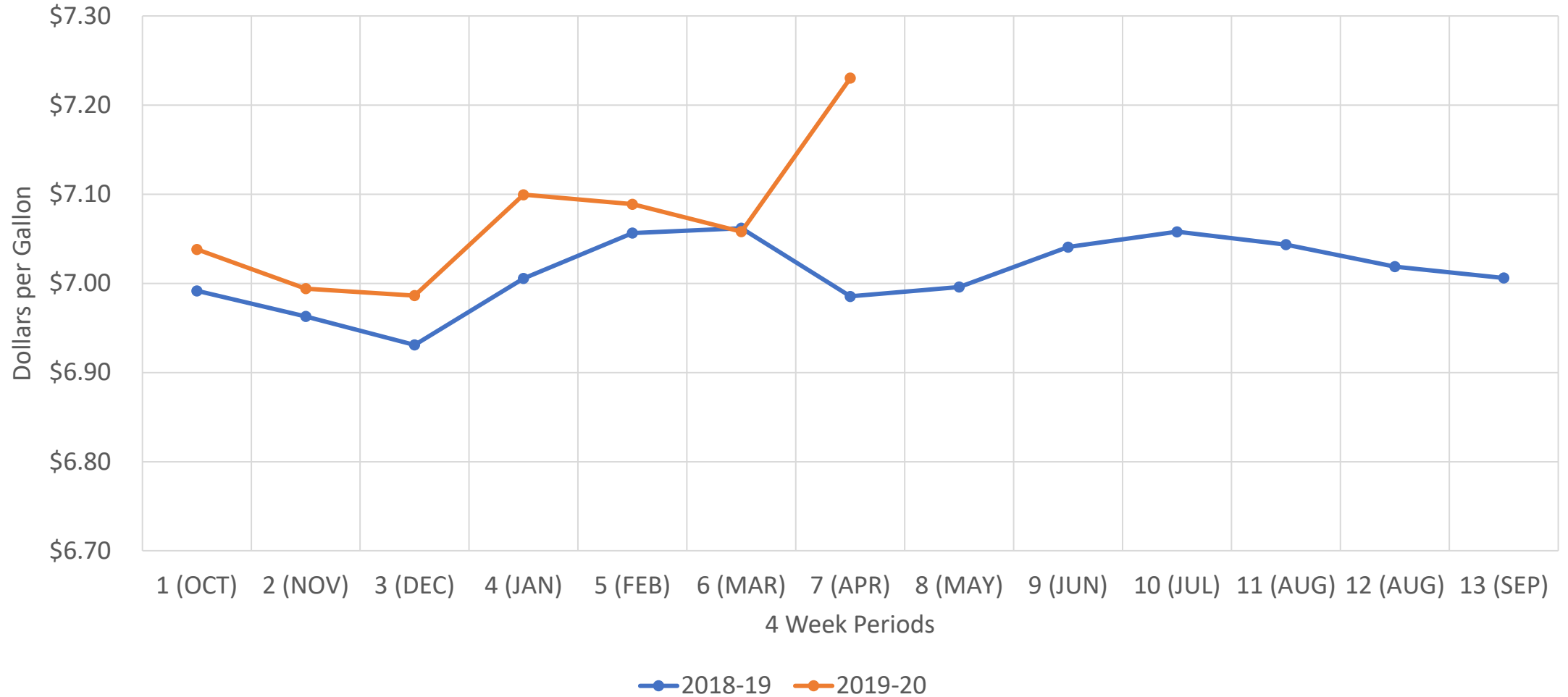
Size Ranges	Container sizes included (ounces)
<11 oz	6, 6.75, 8, 8.45, 10, 10.1, 10.5
11-20 oz	11.5, 12, 12.07, 13.5, 14, 15.2, 16, 17.5
20-50 oz	25.3, 25.4, 32, 33.8, 48
50-70 oz	52, 59, 59.15, 59.17, 63.882, 64
70-110 oz	89, 92, 96
>110 oz	118, 128



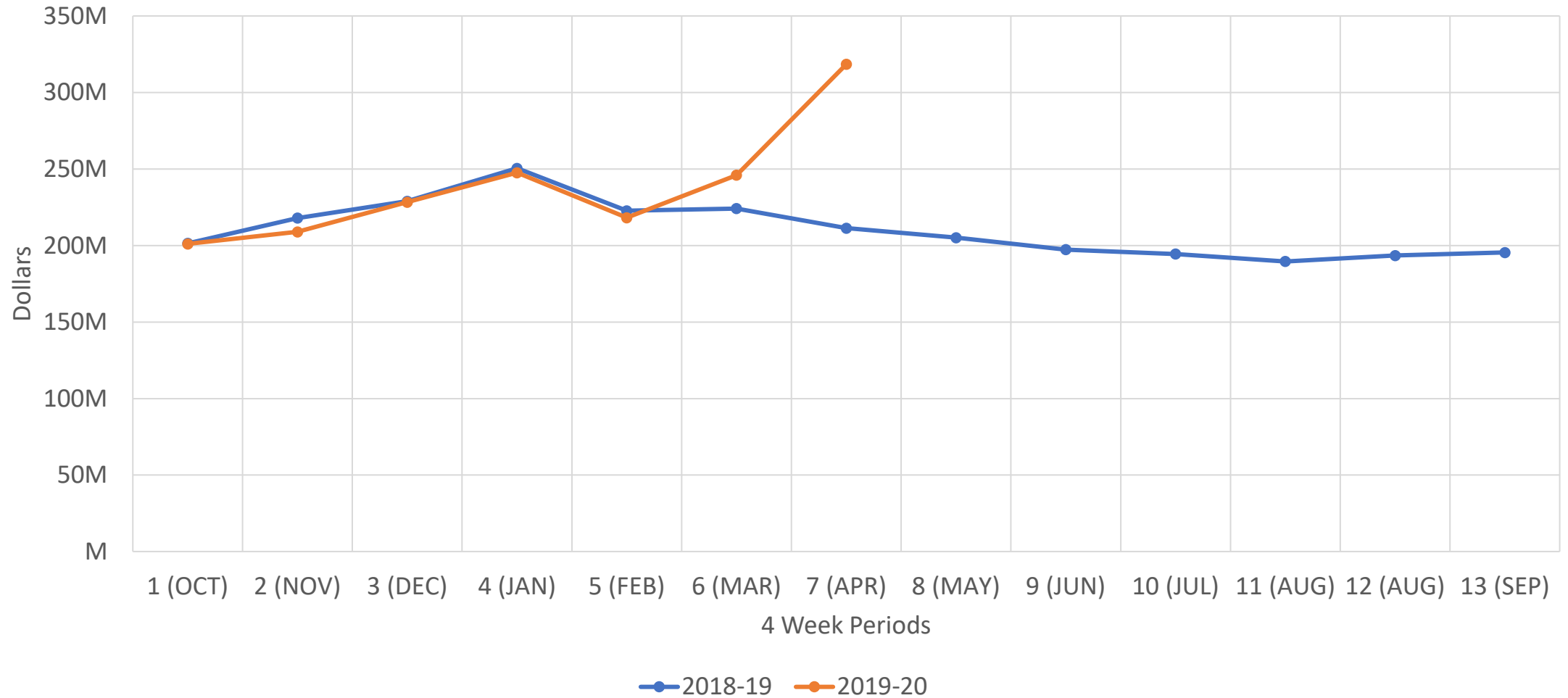
Orange Juice Summary



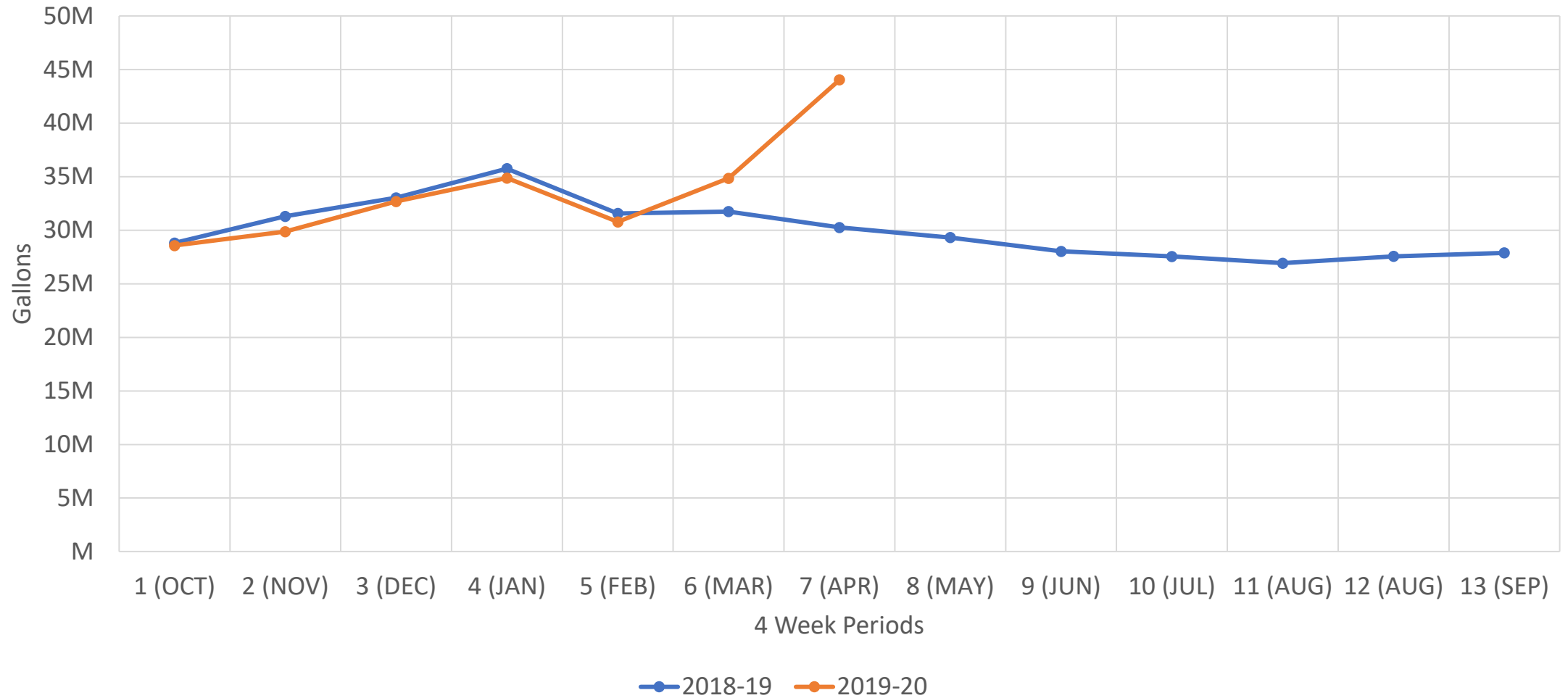
Average OJ Price (xAOC)



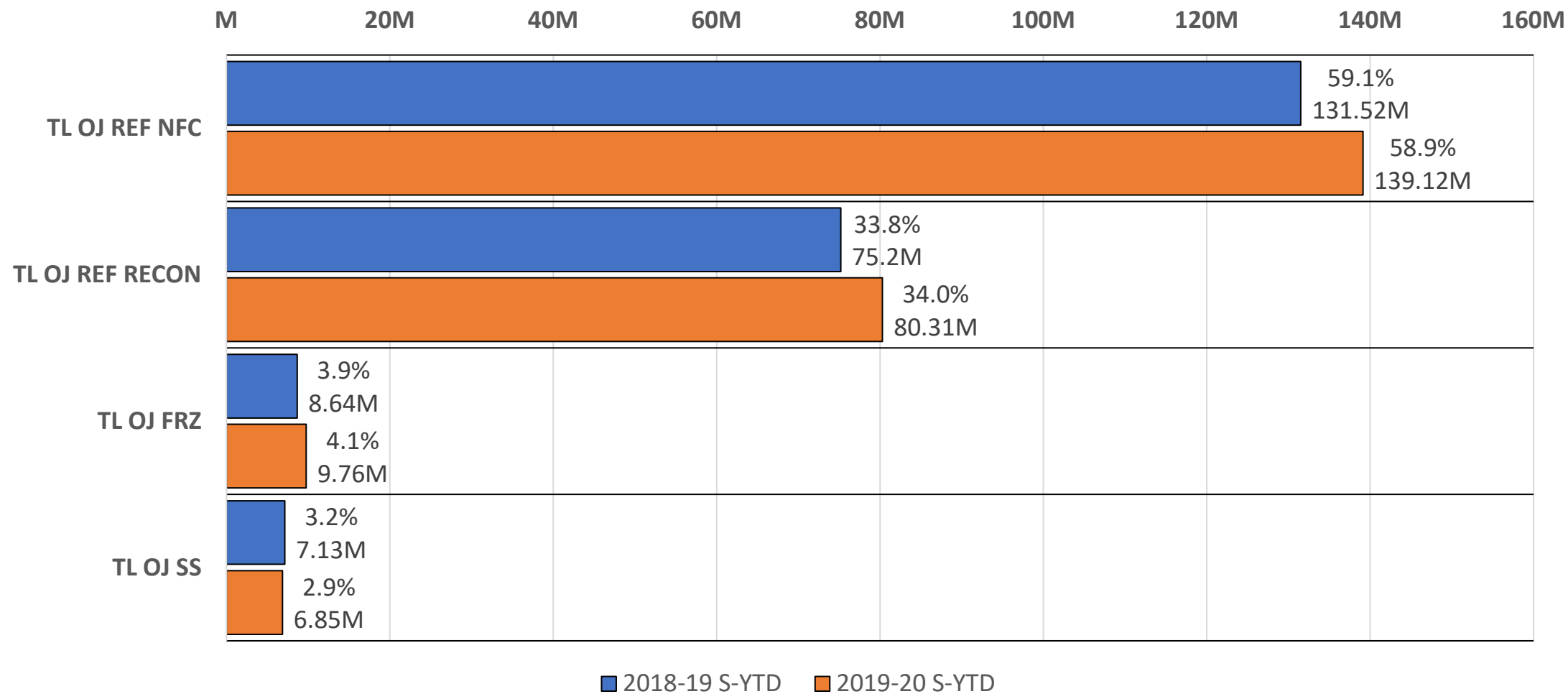
Total OJ Dollars (xAOC)



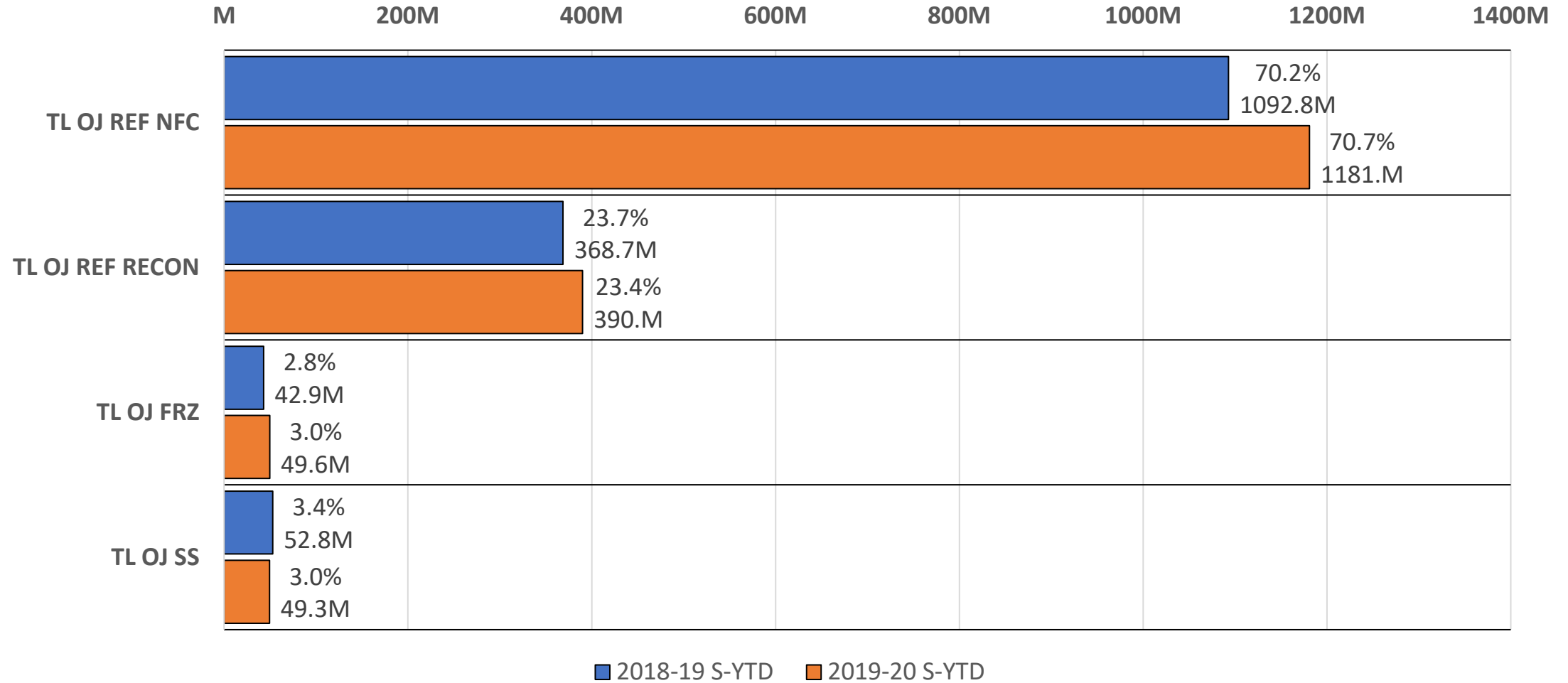
Total OJ Gallons (xAOC)



OJ Volume Share by Product



OJ Dollar Share by Product

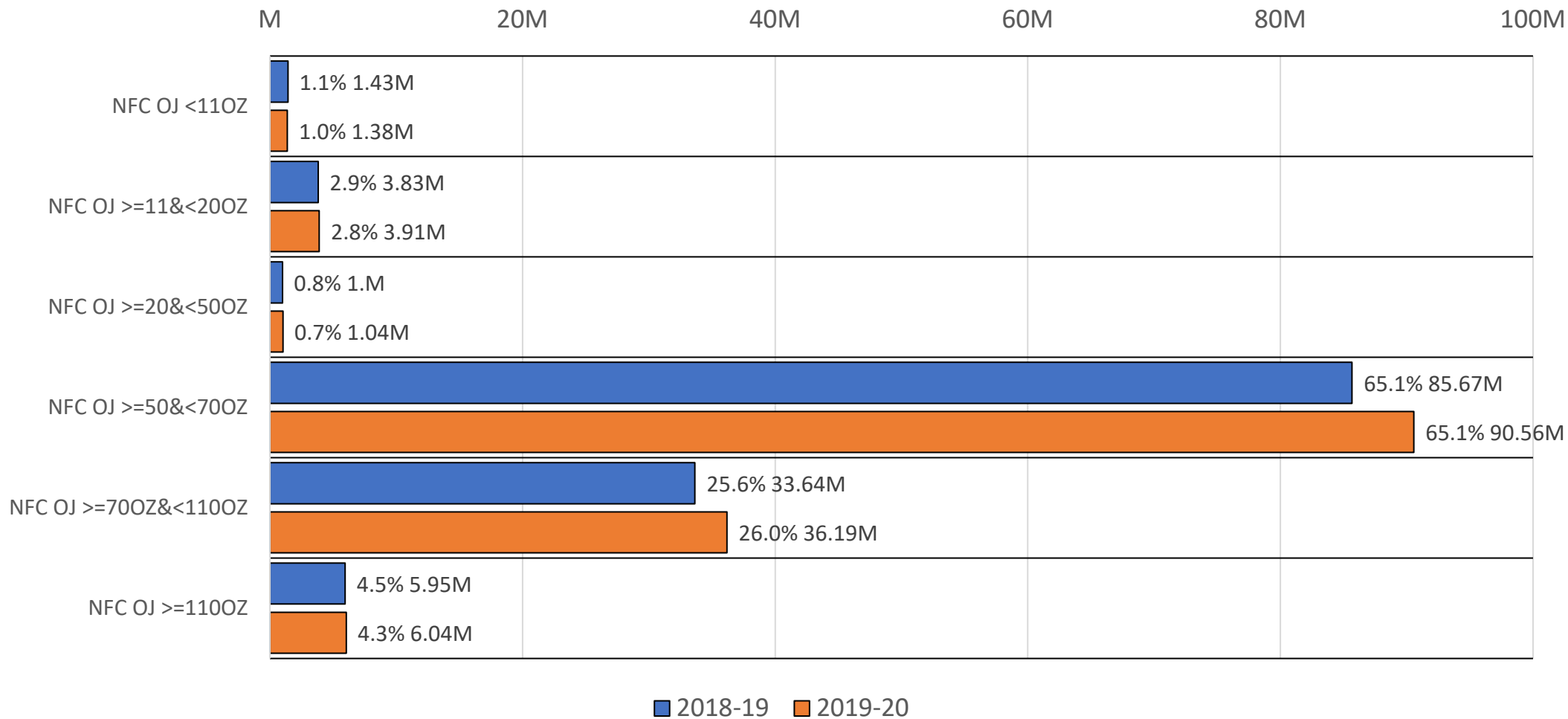




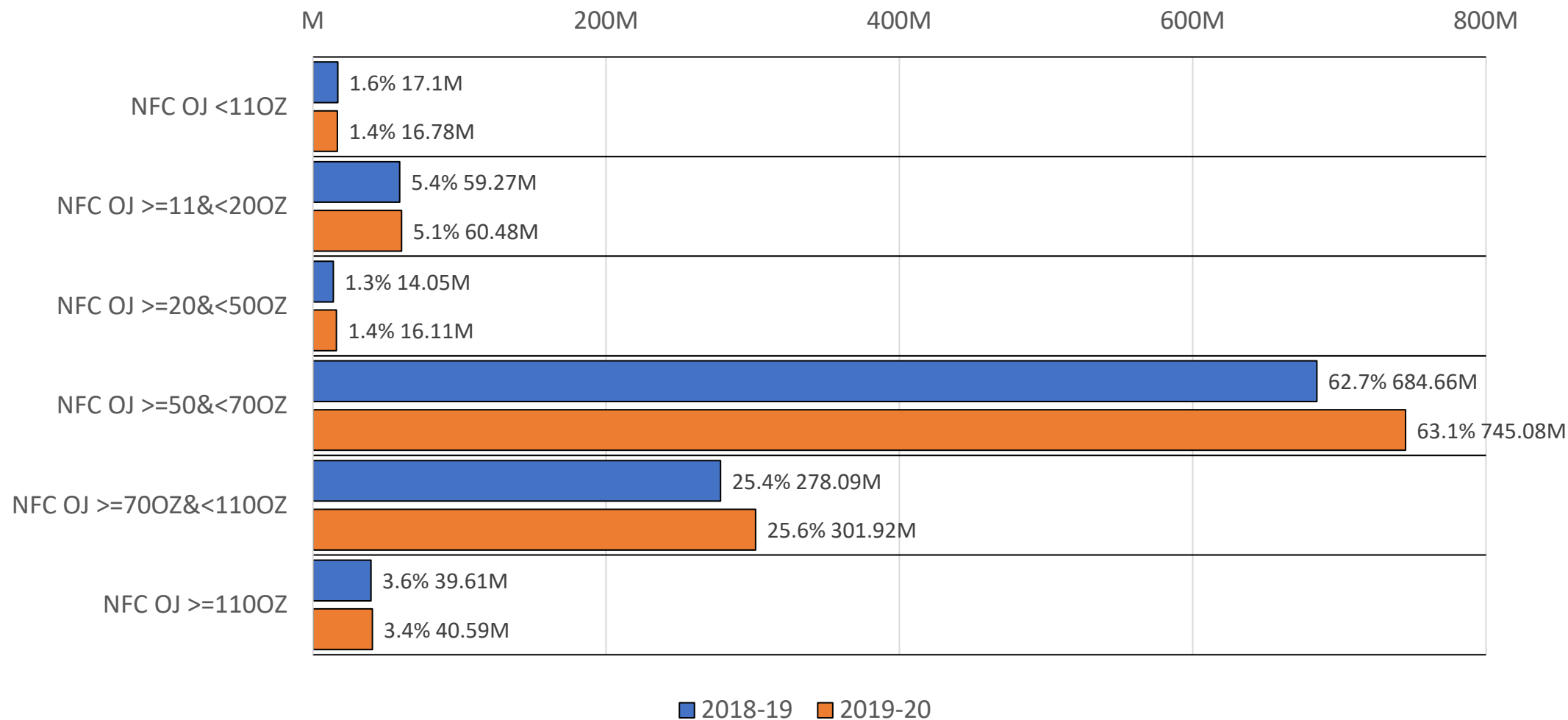
NFC Orange Juice



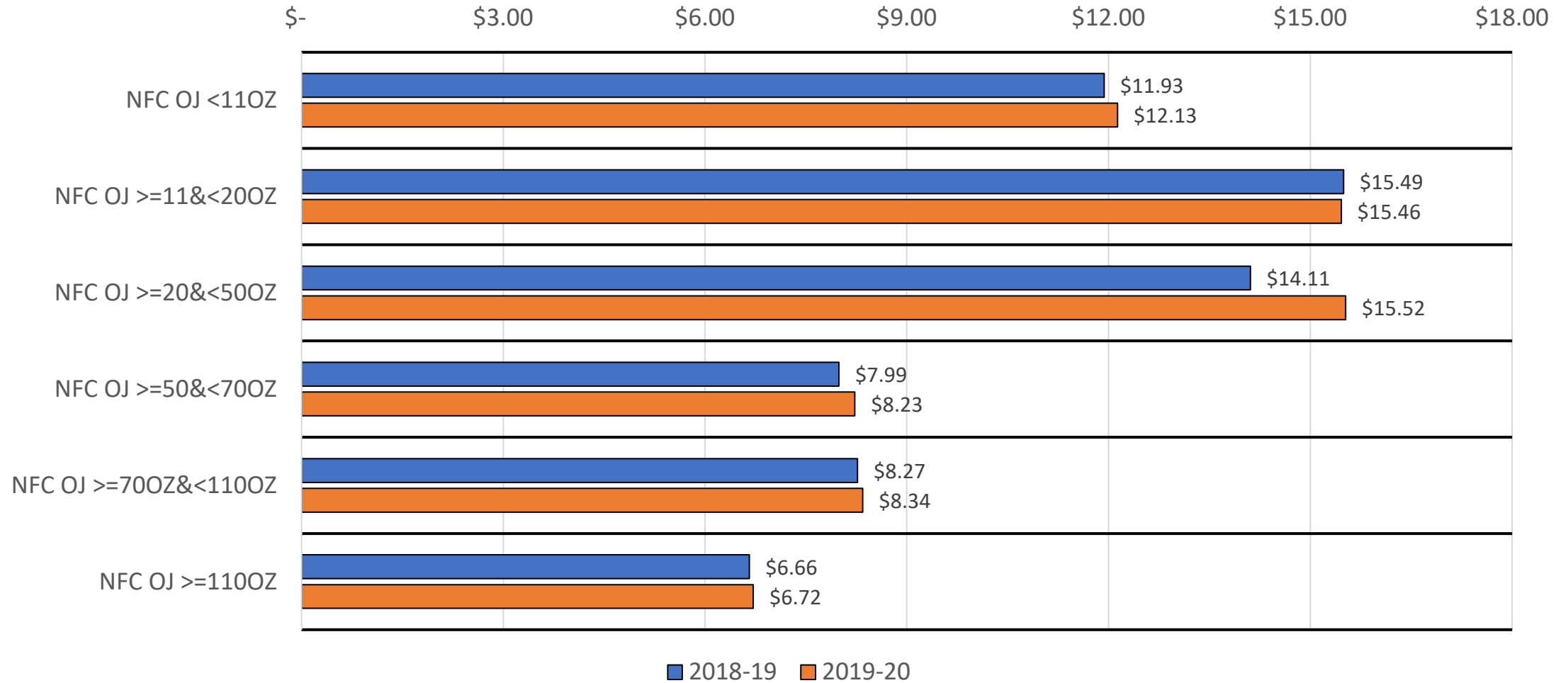
NFC OJ Gallon Sales by Size (S-YTD)



NFC OJ Dollar Sales by Size (S-YTD)

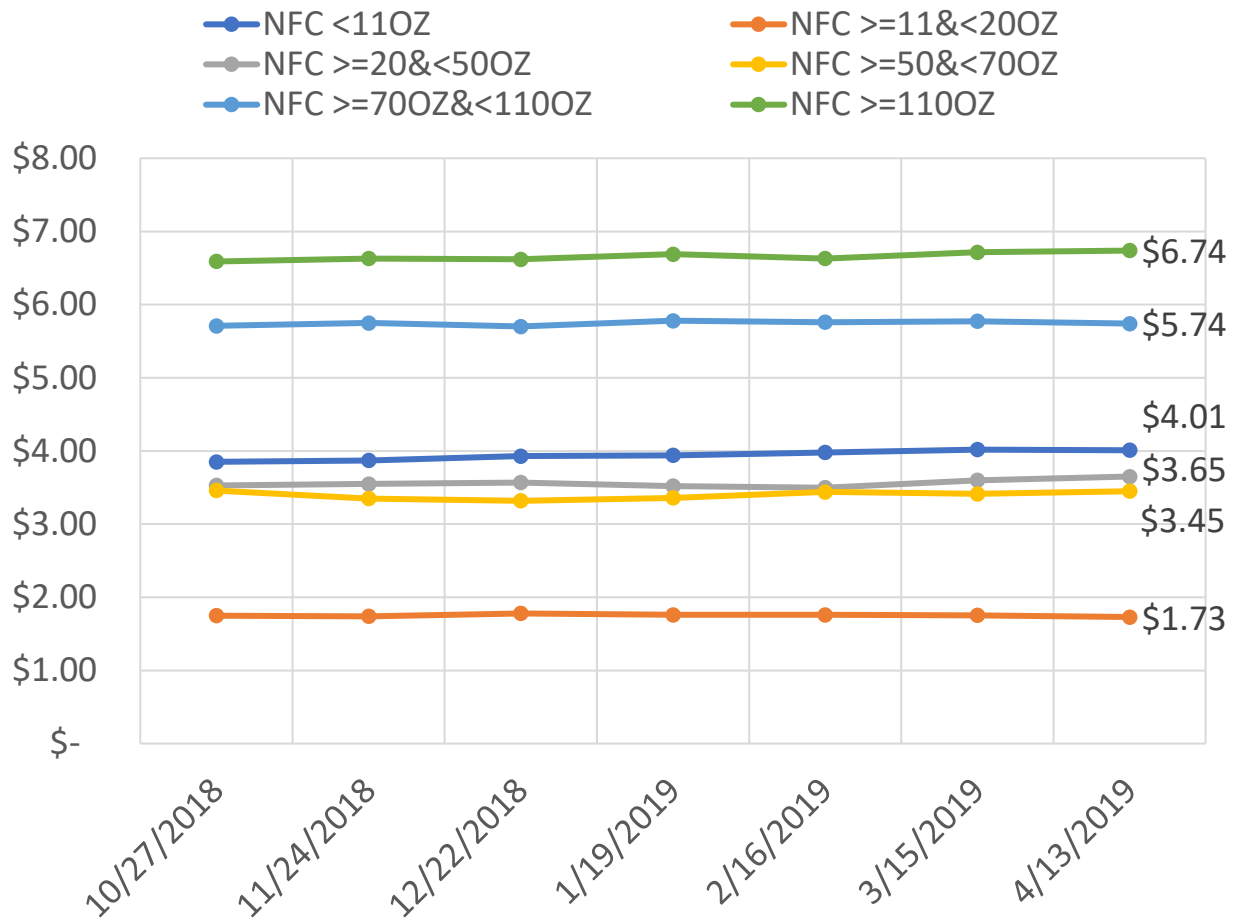


NFC OJ Dollars per Gallon by Size (S-YTD)

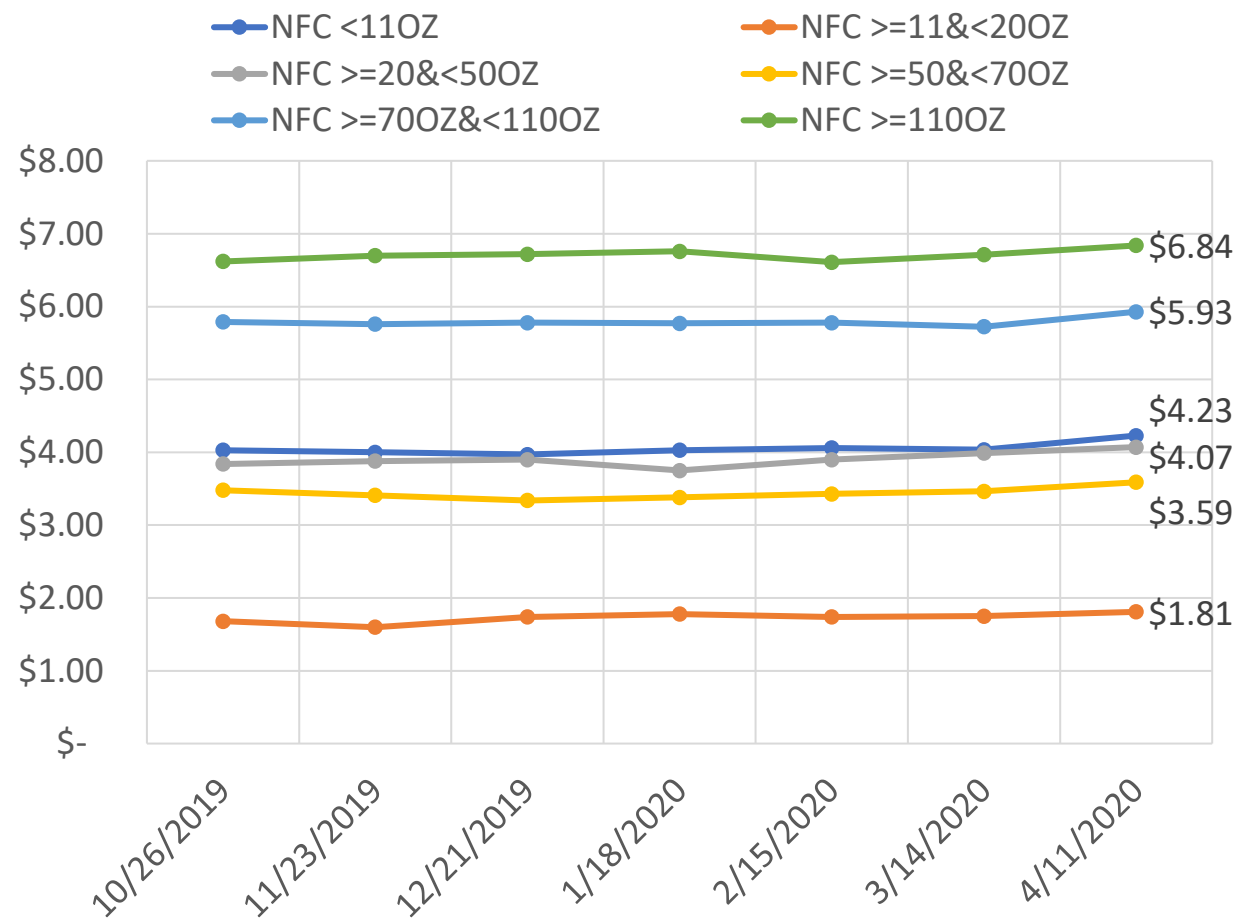


NFC OJ Average Retail Price by Size

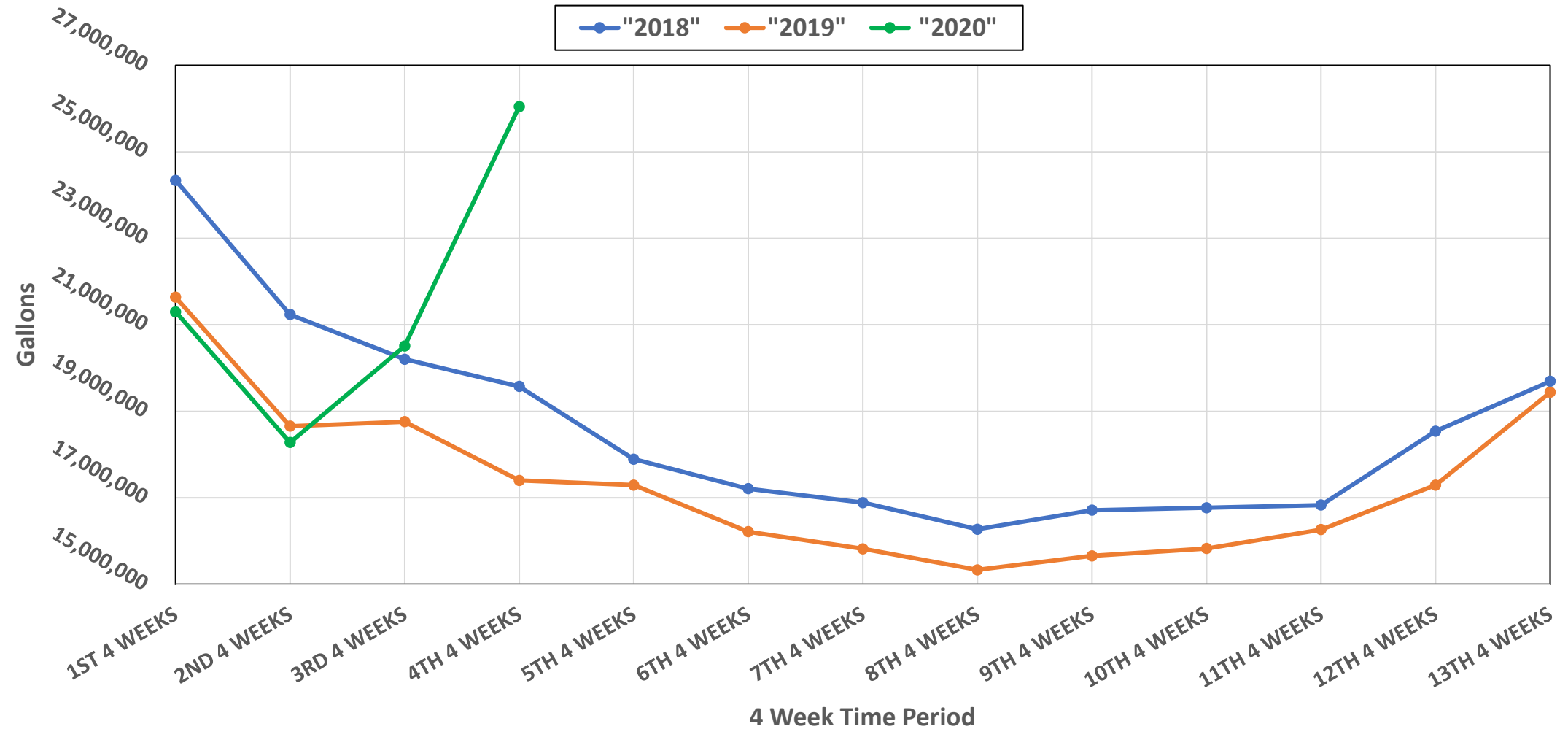
2018-19 NFC OJ



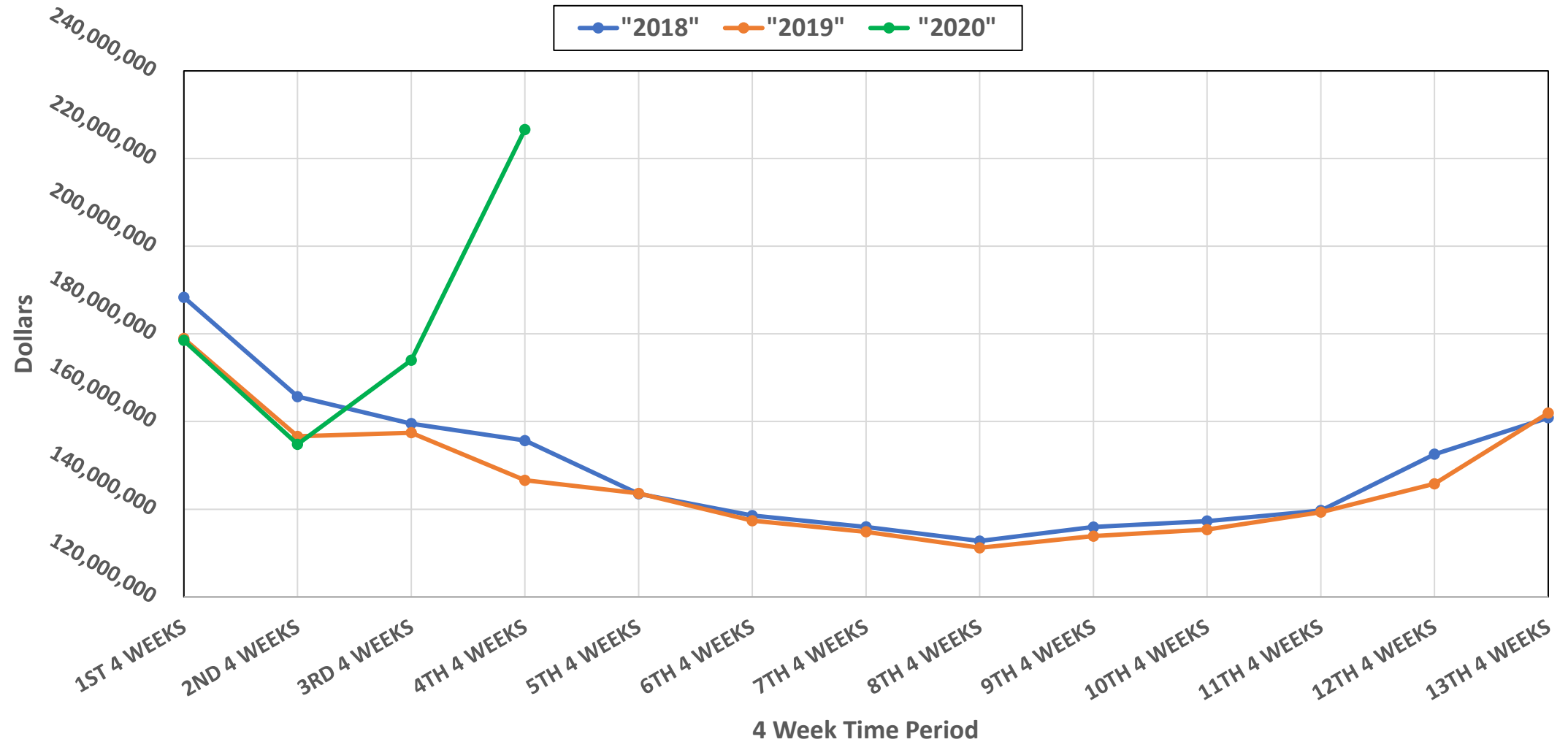
2019-20 NFC OJ



NFC OJ Gallon Sales (Year-over-Year)



NFC OJ Dollar Sales (Year-over-Year)

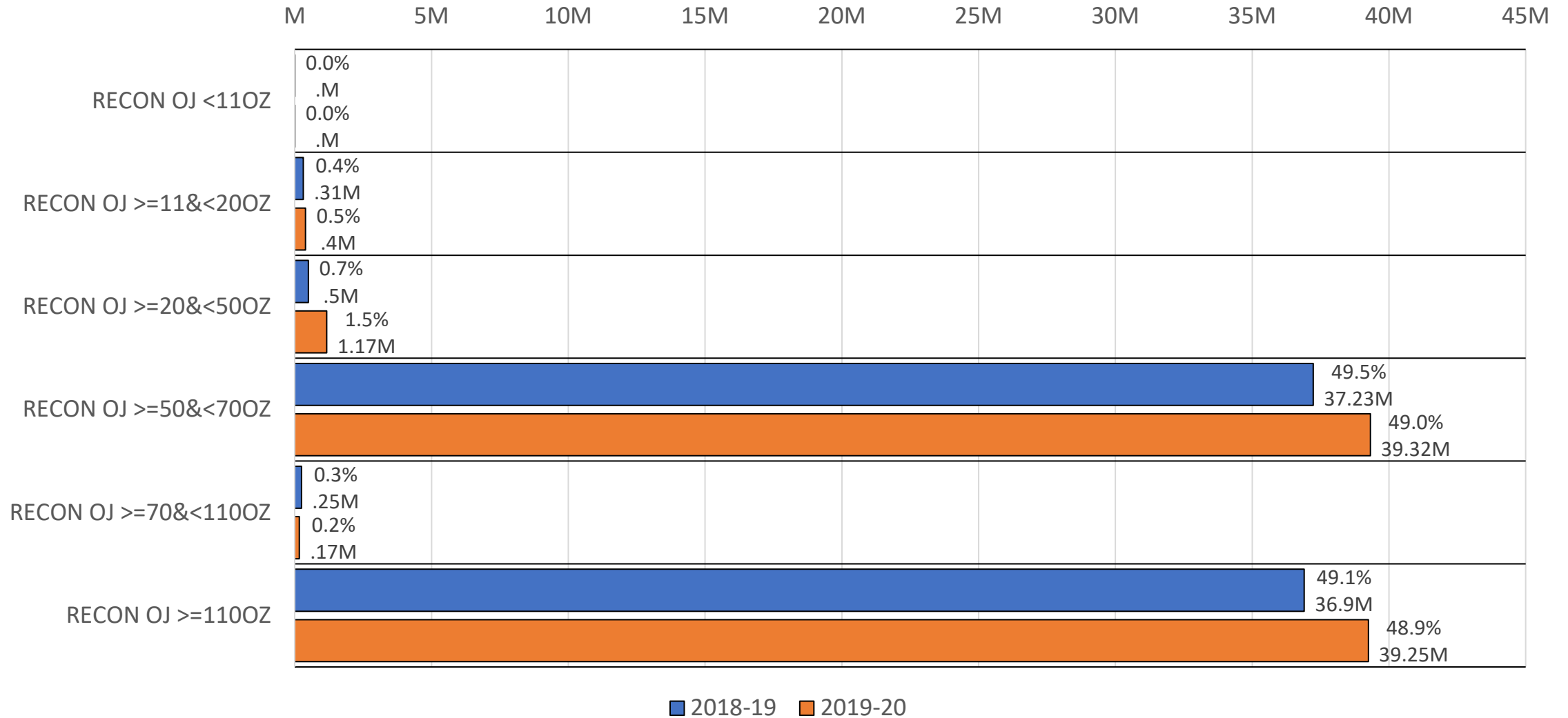




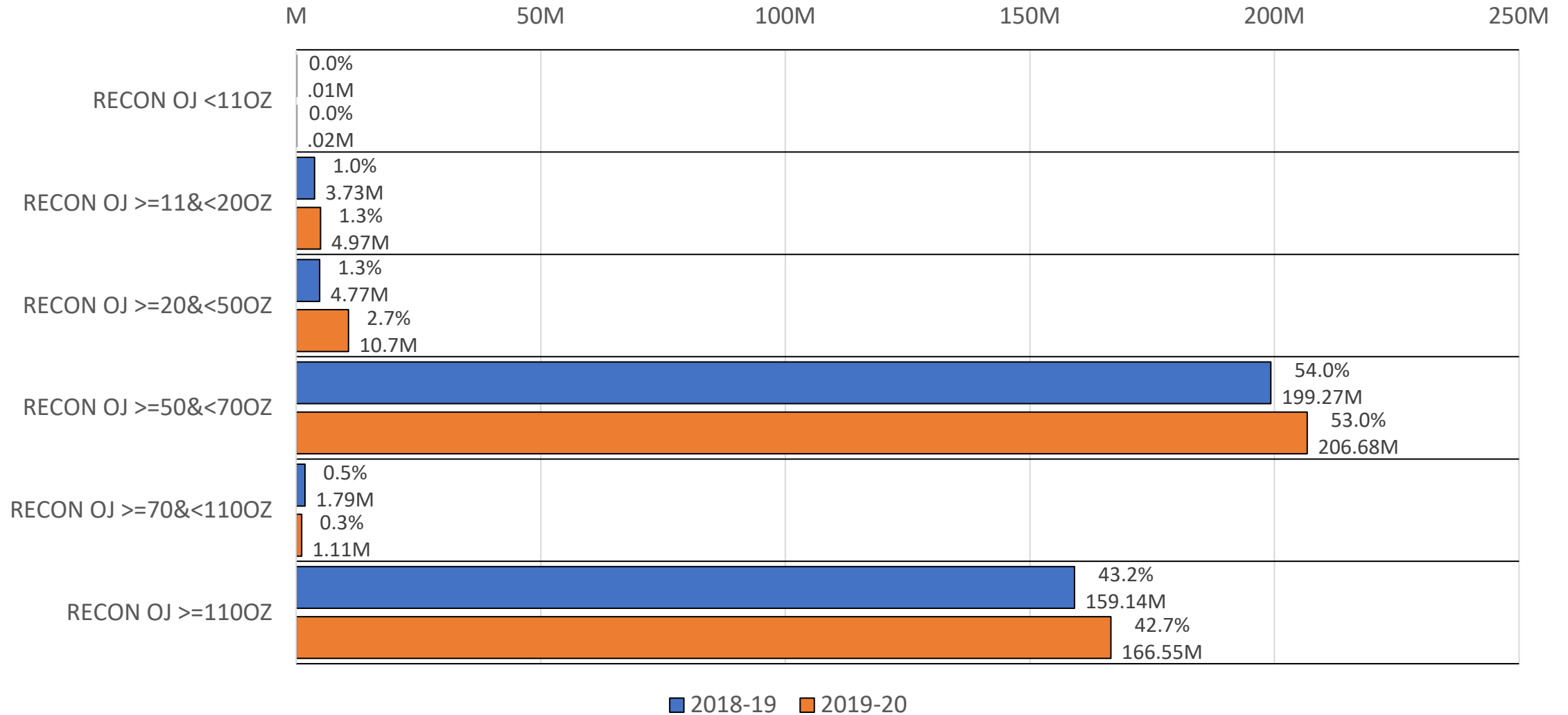
Recon Orange Juice



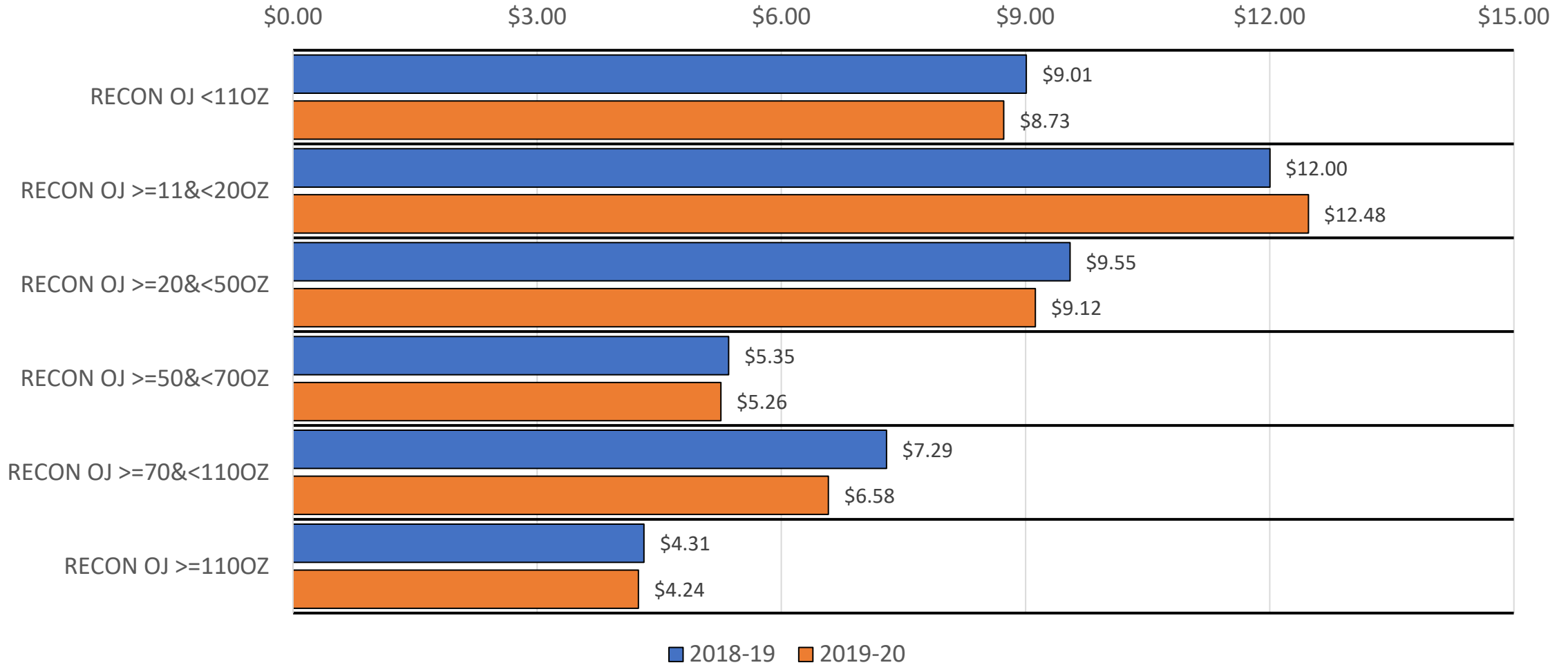
Recon OJ Gallon Sales by Size (S-YTD)



Recon OJ Dollar Sales by Size (S-YTD)



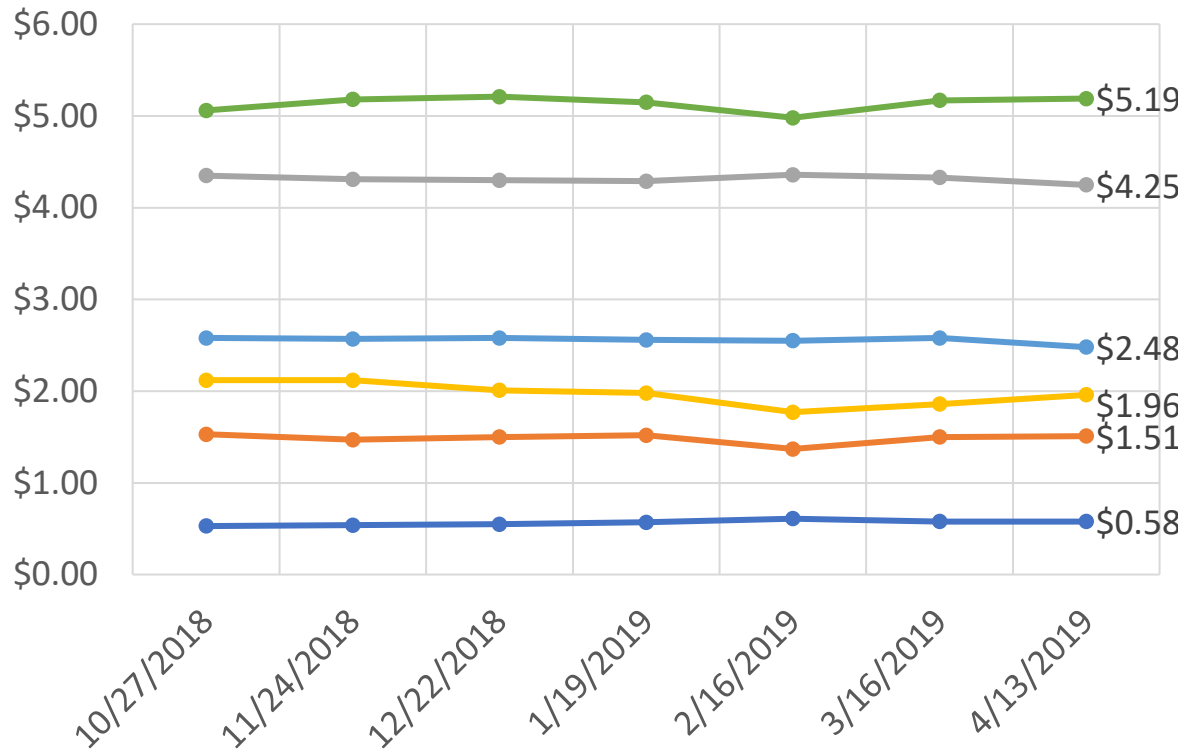
Recon OJ Dollars per Gallon by Size (S-YTD)



Recon OJ Average Retail Price by Size

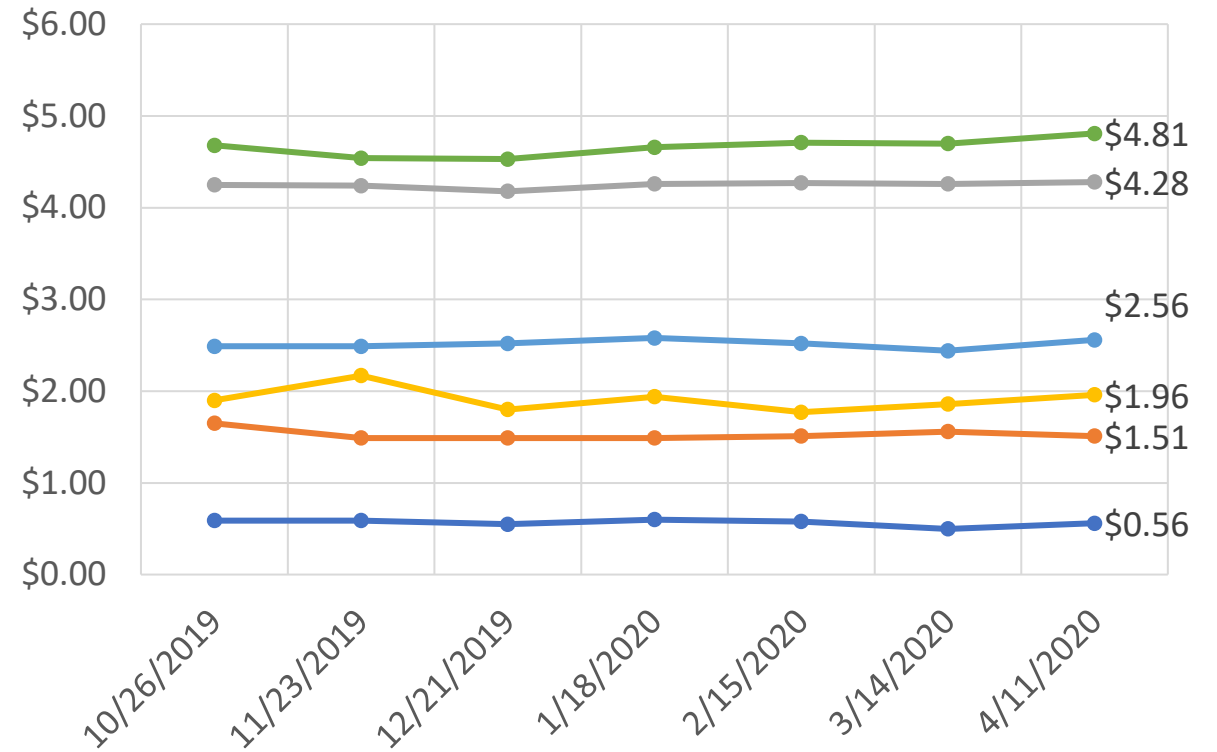
2018-19 RECON OJ

- RECON <11OZ
- RECON >=20<50OZ
- RECON >=70<110OZ
- RECON >=11<20OZ
- RECON >=50<70OZ
- RECON >=110OZ

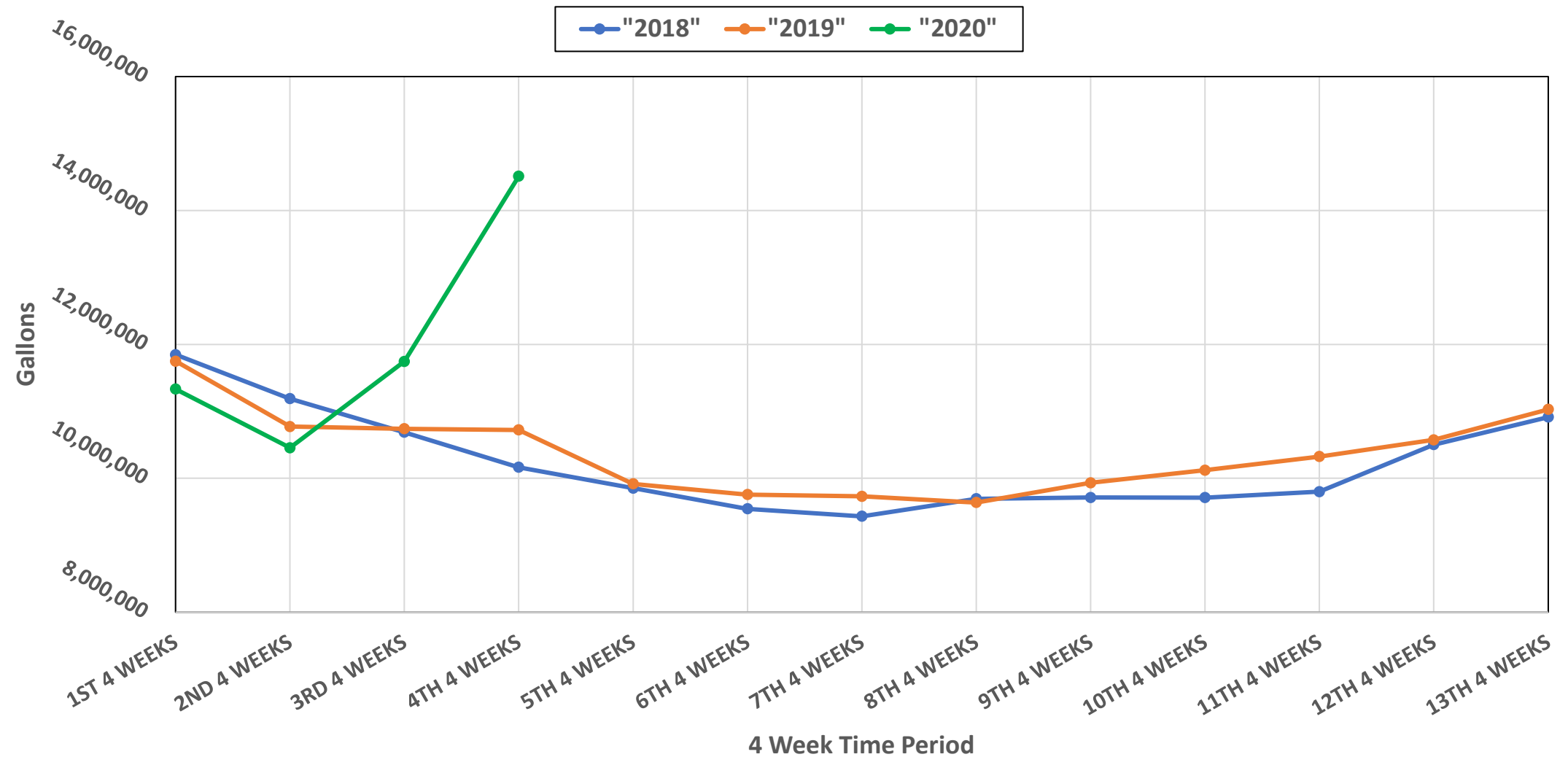


2019-20 RECON OJ

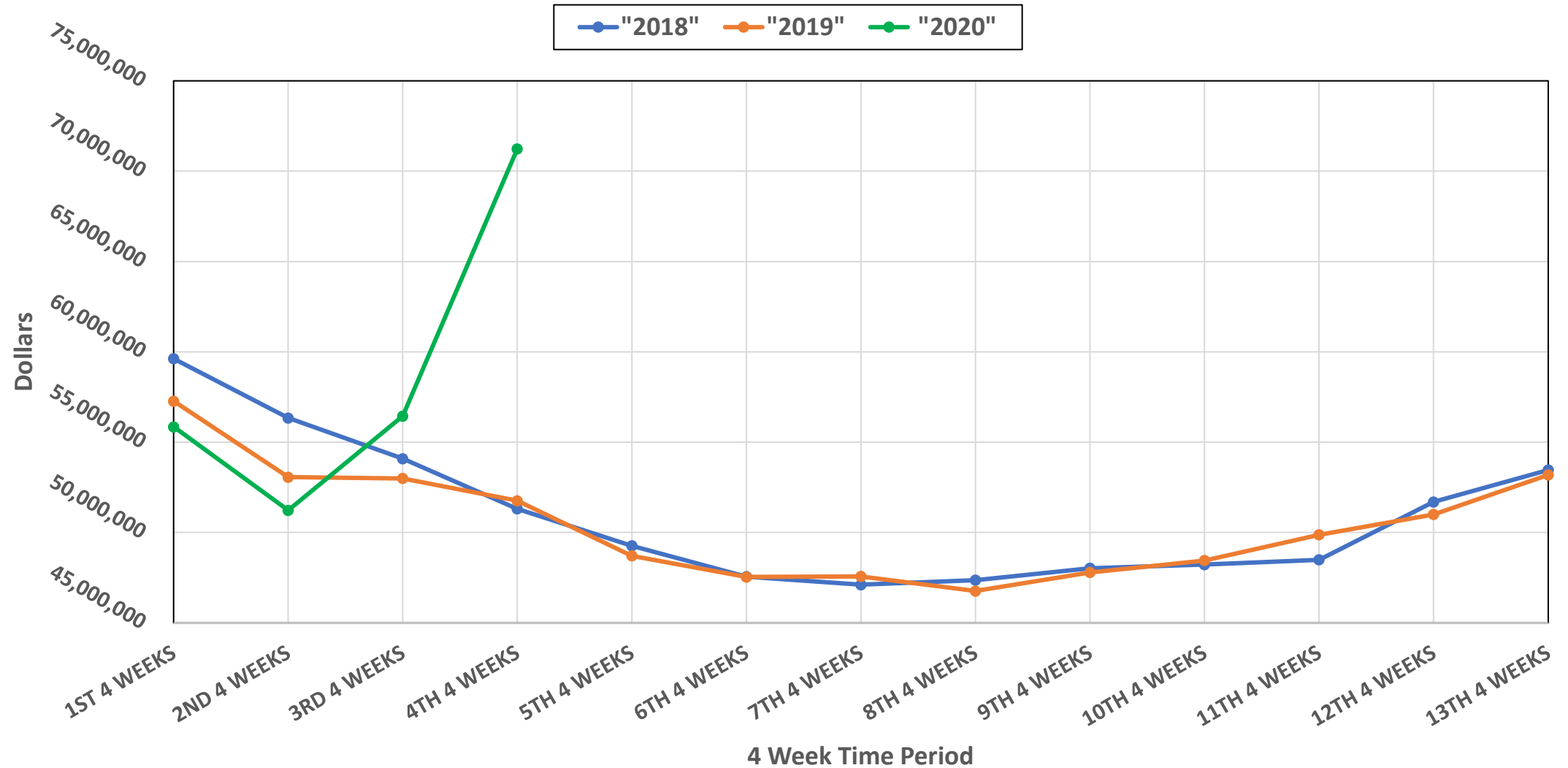
- RECON <11OZ
- RECON >=20<50OZ
- RECON >=70<110OZ
- RECON >=11<20OZ
- RECON >=50<70OZ
- RECON >=110OZ



Recon OJ Gallon Sales (Year-over-Year)



Recon OJ Dollar Sales (Year-over-Year)





Orange Juice Measures of Distribution

Percent ACV Distribution

- **All-commodity volume (ACV) is a weighted measure of product availability, or distribution, based on total store sales.**
- **Percent ACV is a percentage of stores where product is available (based on Nielsen data).**
- **Allows for equalization across different sized markets:**
 - **A large share of sales in a smaller market may or may not be a numerical driver compared to having a lesser share in a larger market.**

NFC OJ Percent ACV Distribution

NFC% ACV Distribution

- Percentage of retail stores where product is available

% ACV (% Stores Selling)	2019-20*	2018-19	2017-18
<11 oz	59.1	60.0	61.0
11-20 oz	88.7	87.1	87.0
20-50 oz.	26.1	28.0	22.0
50-70 oz	97.0	96.0	97.0
70-110 oz	74.0	73.7	73.0
>110 oz	44.7	45.1	46.0
Total NFC	97.9	97.0	97.0

*Season YTD

Recon OJ Percent ACV Distribution

Recon % ACV Distribution

- Percentage of retail stores where product is available

% ACV (% Stores Selling)	2019-20*	2018-19	2017-18
<11 oz	1.0	1.0	1.0
11-20 oz	36.4	17.7	39.5
20-50 oz.	30.9	10.9	11.0
50-70 oz	81.6	81.1	87.0
70-110 oz	1.0	2.0	2.0
>110 oz	69.0	68.3	69.0
Total NFC	90.9	87.3	92.3

*Season YTD

Percent Change in Total Distribution Points (TDP)

- **TDP is a measure that summarizes both span and depth of distribution.**
- **Summarizes percent ACV (span) and the Average Number of Items/ UPCs (depth) available.**
- **Sometimes, TDP and Average Items Carried will be redundant. If percent ACV is high (95% or more), then TDPs are essentially equivalent to Avg Items Carried.**

NFC OJ Percent Change in TDP

% Chg in TDP	% Chg from 2018-19 to 2019-20*	% Chg from 2017-18 to 2018-19
<11 oz	-5.36%	-27.67%
11-20 oz	-6.24%	-7.60%
20-50 oz.	-8.57%	68.11%
50-70 oz	-7.19%	-18.34%
70-110 oz	0.41%	-1.23%
>110 oz	-4.14%	-42.75%
Total NFC	-5.32%	-12.09%

*Season YTD

Recon OJ Percent Change in TDP

% Chg in TDP	% Chg from 2018-19 to 2019-20*	% Chg from 2017-18 to 2018-19
<11 oz	0.00%	0.00%
11-20 oz	107.41%	-83.80%
20-50 oz.	184.52%	-61.70%
50-70 oz	5.58%	-20.30%
70-110 oz	-50.00%	-20.00%
>110 oz	-0.55%	-20.90%
Total Recon	9.48%	-26.30%

*Season YTD

Percent Change in Average Number of Items per Store

- **The number of items, on average, that a retailer carries of a category, segment, or brand.**
- **Measured by number of UPCs.**
- **It can be calculated by taking the sum of percent ACV Distribution of all the items divided by the percent ACV Distribution of the brand/ category.**

NFC OJ Average Number of Items per Store Percent Change

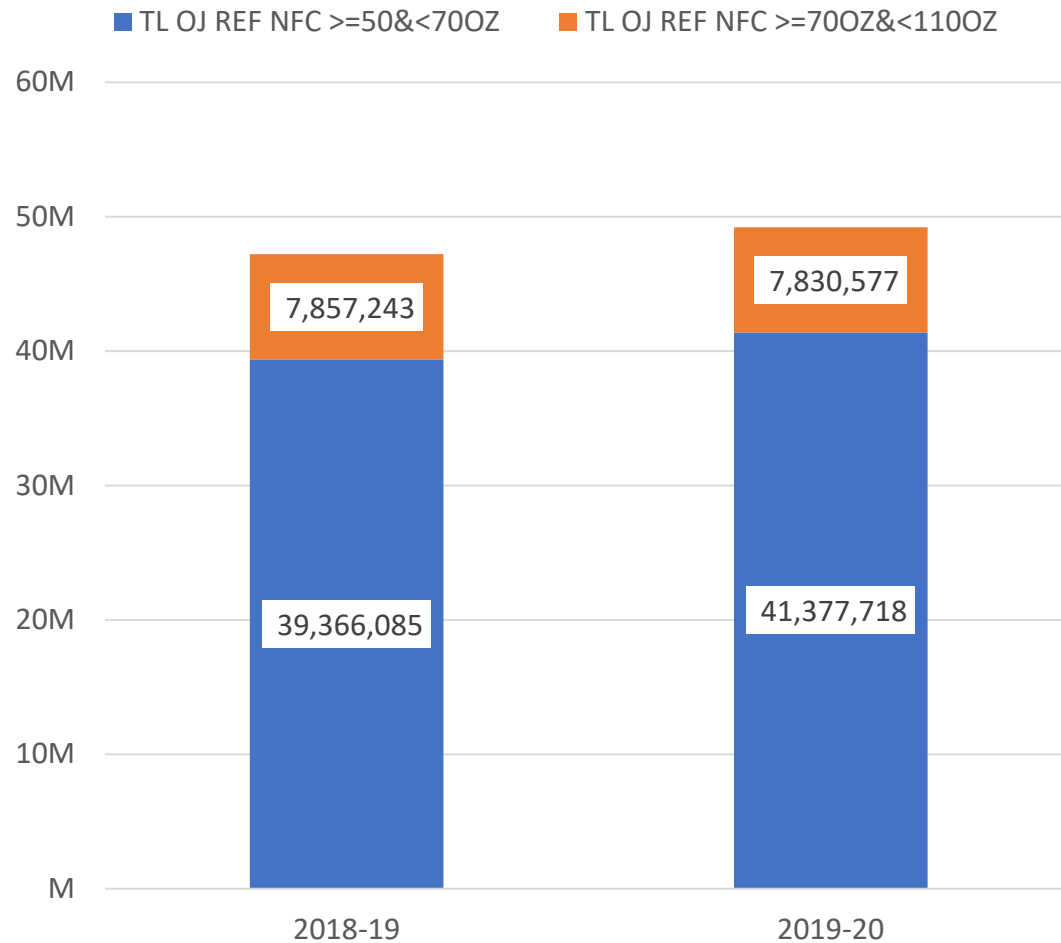
% Chg in Items per Store	% Chg from 2018-19 to 2019-20*	% Chg from 2017-18 to 2018-19
<11 oz	-3.99%	-26.50%
11-20 oz	-7.91%	-7.60%
20-50 oz.	-2.08%	30.90%
50-70 oz	-8.14%	-19.20%
70-110 oz	0.03%	-2.20%
>110 oz	-3.22%	-41.80%
Total NFC	-6.14%	-12.10%
*Season YTD		

Recon OJ Average Number of Items per Store Percent Change

% Chg in Items per Store	% Chg from 2018-19 to 2019-20*	% Chg from 2017-18 to 2018-19
<11 oz	0.00%	0.00%
11-20 oz	0.86%	-63.40%
20-50 oz.	0.11%	-47.40%
50-70 oz	5.03%	-14.40%
70-110 oz	0.00%	-20.00%
>110 oz	-1.58%	-19.70%
Total Recon	5.18%	-19.30%
*Season YTD		

NFC OJ Gallons Sold on Promotion

Gallons Sold on Promotion - NFC OJ



Product	NO PROMO		ANY PROMO	
	2018-19	2019-20	2018-19	2019-20
TL OJ REF NFC <110Z	1,278,512	1,267,620	154,522	115,147
TL OJ REF NFC >=11Z<200Z	2,846,755	2,931,916	978,561	979,937
TL OJ REF NFC >=20Z<50OZ	838,956	874,479	156,558	163,511
TL OJ REF NFC >=50Z<70OZ	46,305,267	49,178,530	39,366,085	41,377,718
TL OJ REF NFC >=70OZ<110OZ	25,785,146	28,355,562	7,857,243	7,830,577
TL OJ REF NFC >=110OZ	5,441,756	5,592,644	508,436	450,118
TL OJ REF NFC	82,496,392	88,200,751	49,021,405	50,917,008

Product	NO PROMO		ANY PROMO	
	2018-19	2019-20	2018-19	2019-20
TL OJ REF NFC <110Z	1.0%	0.9%	0.1%	0.1%
TL OJ REF NFC >=11Z<200Z	2.2%	2.1%	0.7%	0.7%
TL OJ REF NFC >=20Z<50OZ	0.6%	0.6%	0.1%	0.1%
TL OJ REF NFC >=50Z<70OZ	35.2%	35.4%	29.9%	29.7%
TL OJ REF NFC >=70OZ<110OZ	19.6%	20.4%	6.0%	5.6%
TL OJ REF NFC >=110OZ	4.1%	4.0%	0.4%	0.3%
TL OJ REF NFC	62.7%	63.4%	37.3%	36.6%

NFC OJ Gallons Sold on Promotion

Size	NO PROMO GALLONS		ANY PROMO GALLONS		ANY FEAT W/O DISP GALLONS		ANY DISP W/O FEAT GALLONS		ANY FEAT AND DISP GALLONS		PRICE DECR GALLONS	
	2018-19	2019-20	2018-19	2019-20	2018-19	2019-20	2018-19	2019-20	2018-19	2019-20	2018-19	2019-20
NFC <11OZ	1,278,512	1,267,620	154,522	115,147	10,509	9,808	2,528	2,292	21	-	141,465	103,044
NFC >=11<20OZ	2,846,755	2,931,916	978,561	979,937	261,620	234,420	35,470	45,096	12,785	8,553	668,690	691,871
NFC >=20<50OZ	838,956	874,479	156,558	163,511	39,526	34,701	2,500	29,628	874	364	113,655	98,820
NFC >=50<70OZ	46,305,267	49,178,530	39,366,085	41,377,718	23,072,359	24,847,786	1,476,107	1,219,524	2,848,945	1,790,675	11,968,676	13,519,735
NFC >=70OZ<110OZ	25,785,146	28,355,562	7,857,243	7,830,577	3,295,716	3,439,866	755,120	223,641	232,444	115,415	3,573,959	4,051,654
NFC >=110OZ	5,441,756	5,592,644	508,436	450,118	327,161	240,971	12,454	21,293	3,222	1,915	165,599	185,941
<u>NFC TOTAL</u>	<u>82,496,392</u>	<u>88,200,751</u>	<u>49,021,405</u>	<u>50,917,008</u>	<u>27,006,891</u>	<u>28,807,552</u>	<u>2,284,179</u>	<u>1,541,474</u>	<u>3,098,291</u>	<u>1,916,922</u>	<u>16,632,044</u>	<u>18,651,065</u>



Grapefruit Juice



Total GJ – 4 Weeks ending 4/11/20

**TOTAL GJ - XAOC
4 WEEKS ENDING
04/11/20**

	Gallons			Dollars			Price per EQ Gallon		
	4 Weeks YA	4 Weeks	% Chg	4 Weeks YA	4 Weeks	% Chg	4 Weeks YA	4 Weeks	% Chg
TL GJ	908,317	1,137,293	25.21%	\$ 7,517,535	\$ 9,940,148	32.23%	\$ 8.28	\$ 8.74	5.60%
TL GJ REF NFC	630,603	792,591	25.69%	\$ 5,623,355	\$ 7,346,189	30.64%	\$ 8.92	\$ 9.27	3.94%
TL GJ REF RECON	9,008	25,116	178.82%	\$ 116,422	\$ 472,194	305.59%	\$ 12.92	\$ 18.80	45.47%
TL GJ FRZ	31,905	49,906	56.42%	\$ 150,105	\$ 175,933	17.21%	\$ 4.70	\$ 3.53	-25.07%
TL GJ SS	236,801	269,682	13.89%	\$ 1,627,654	\$ 1,945,832	19.55%	\$ 6.87	\$ 7.22	4.97%

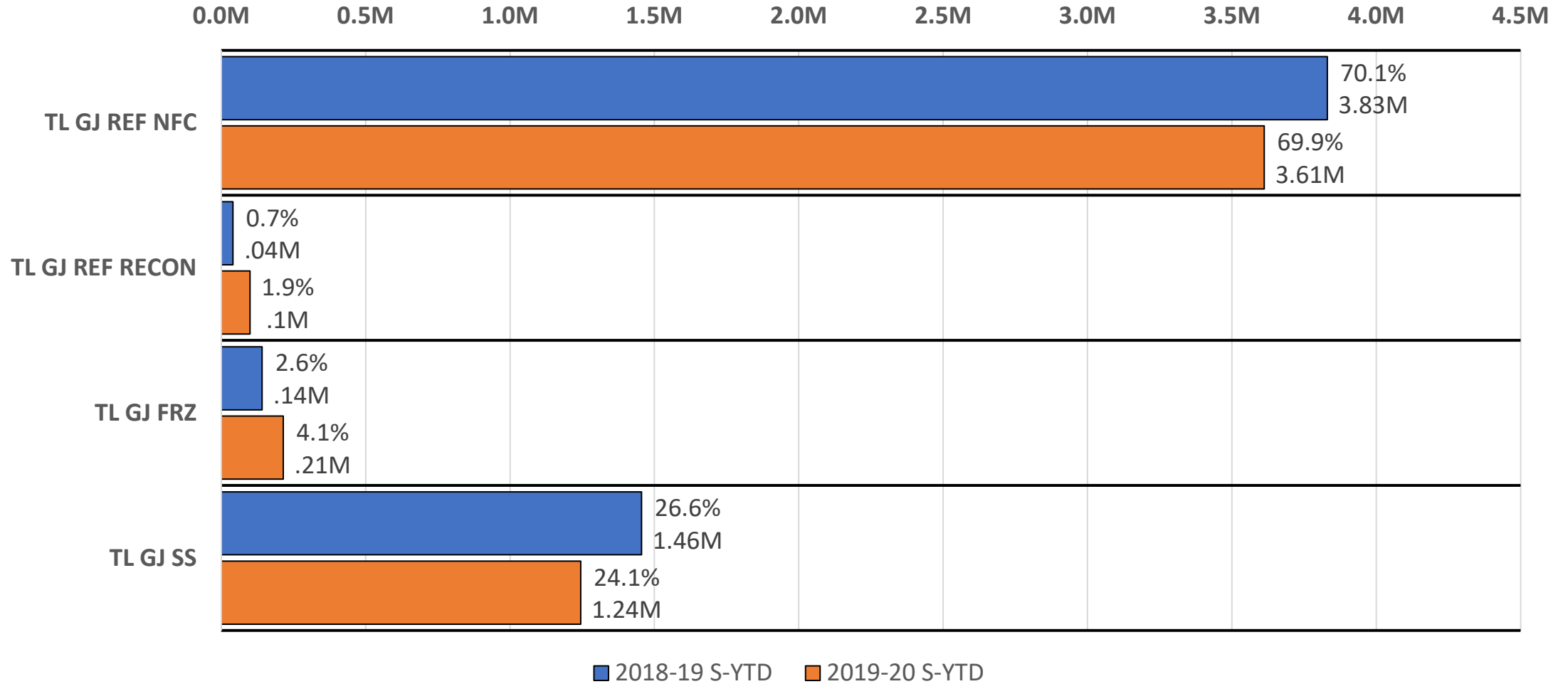
Total GJ - SYTD

TOTAL US - XAOC

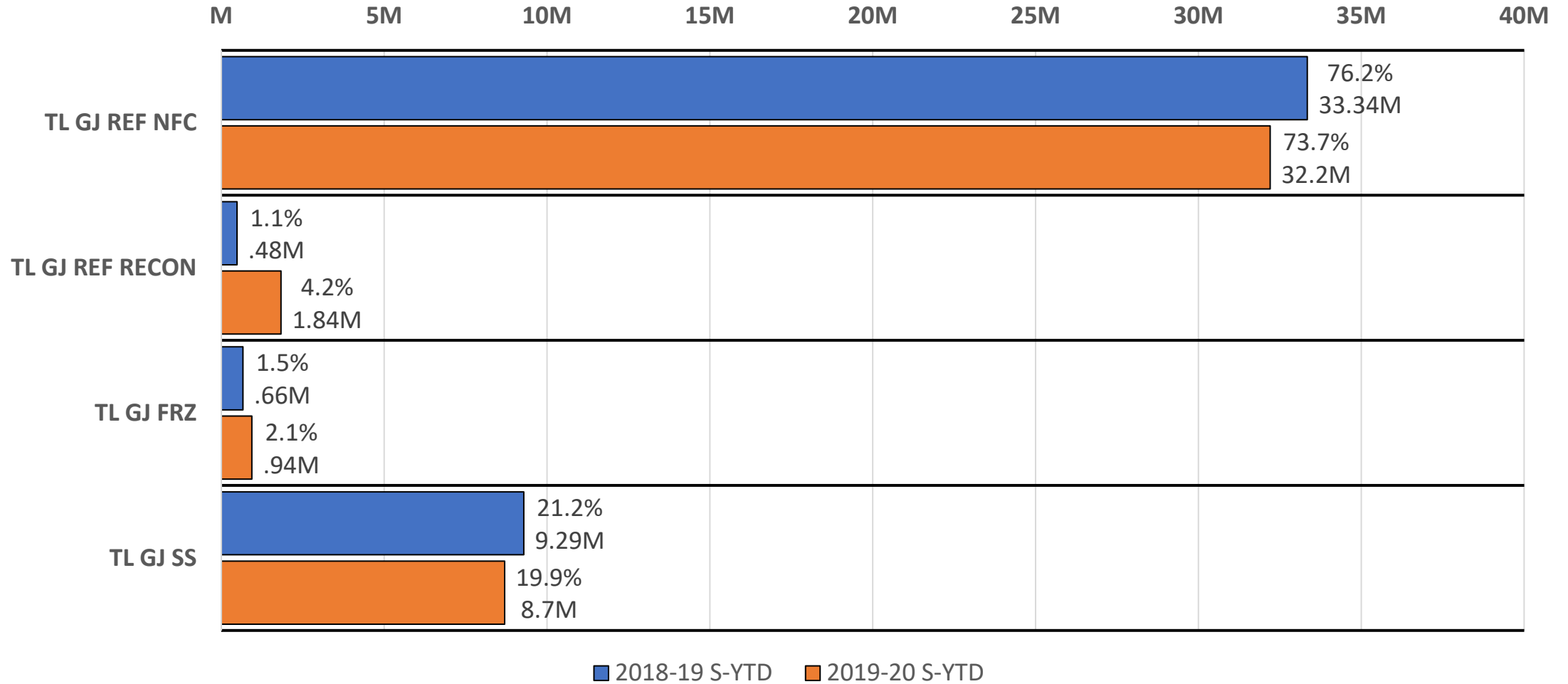
Season Year to Date

	Gallons			Dollars			Price per EQ Gallon		
	SYTD 2018-19	SYTD 2019-20	% Chg	SYTD 2018-19	SYTD 2019-20	% Chg	SYTD 2018-19	SYTD 2019-20	% Chg
TL GJ	6,376,375	6,308,261	-1.1%	\$51,295,366	\$53,619,807	4.5%	\$8.04	\$8.50	5.7%
TL GJ REF NFC	4,461,048	4,404,774	-1.3%	\$38,967,337	\$39,548,635	1.5%	\$8.74	\$8.98	2.8%
TL GJ REF RECON	49,693	124,979	151.5%	\$598,104	\$2,307,278	285.8%	\$12.04	\$18.46	53.4%
TL GJ FRZ	173,170	264,264	52.6%	\$814,086	\$1,114,528	36.9%	\$4.70	\$4.22	-10.3%
TL GJ SS	1,692,470	1,514,245	-10.5%	\$10,915,843	\$10,649,365	-2.4%	\$6.45	\$7.03	9.0%

GJ Volume Share by Product



GJ Dollar Share by Product



GJ Percent ACV Distribution

Total GJ% ACV Distribution

- Percentage of retail stores where product is available

% ACV (% Stores Selling)	2019-20*	2018-19	2017-18
NFC GJ	73.0	72.0	72.0
RECON GJ	26.4	6.1	7.0
FROZEN GJ	16.0	15.7	6.0
SS GJ	55.4	55.9	68.5
Total GJ	75.3	75.0	76.8

*Season YTD

GJ Percent Change in TDP

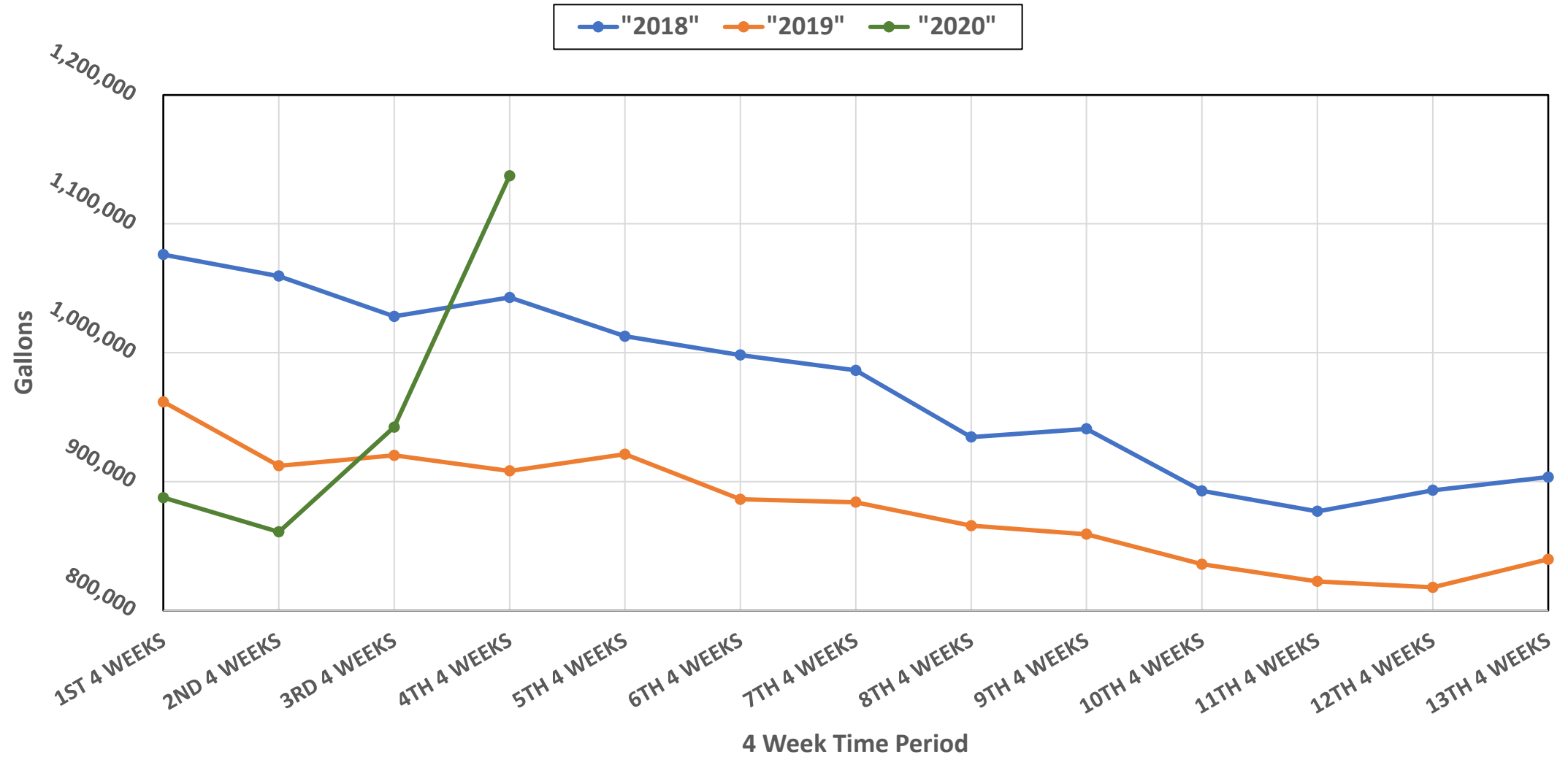
% Chg in TDP	% Chg from 2018-19 to 2019-20*	% Chg from 2017-18 to 2018-19
NFC GJ	-3.16%	4.95%
RECON GJ	344.19%	-52.77%
FROZEN GJ	-4.02%	238.89%
SS GJ	-13.16%	-27.98%
Total GJ	0.37%	-8.35%

*Season YTD

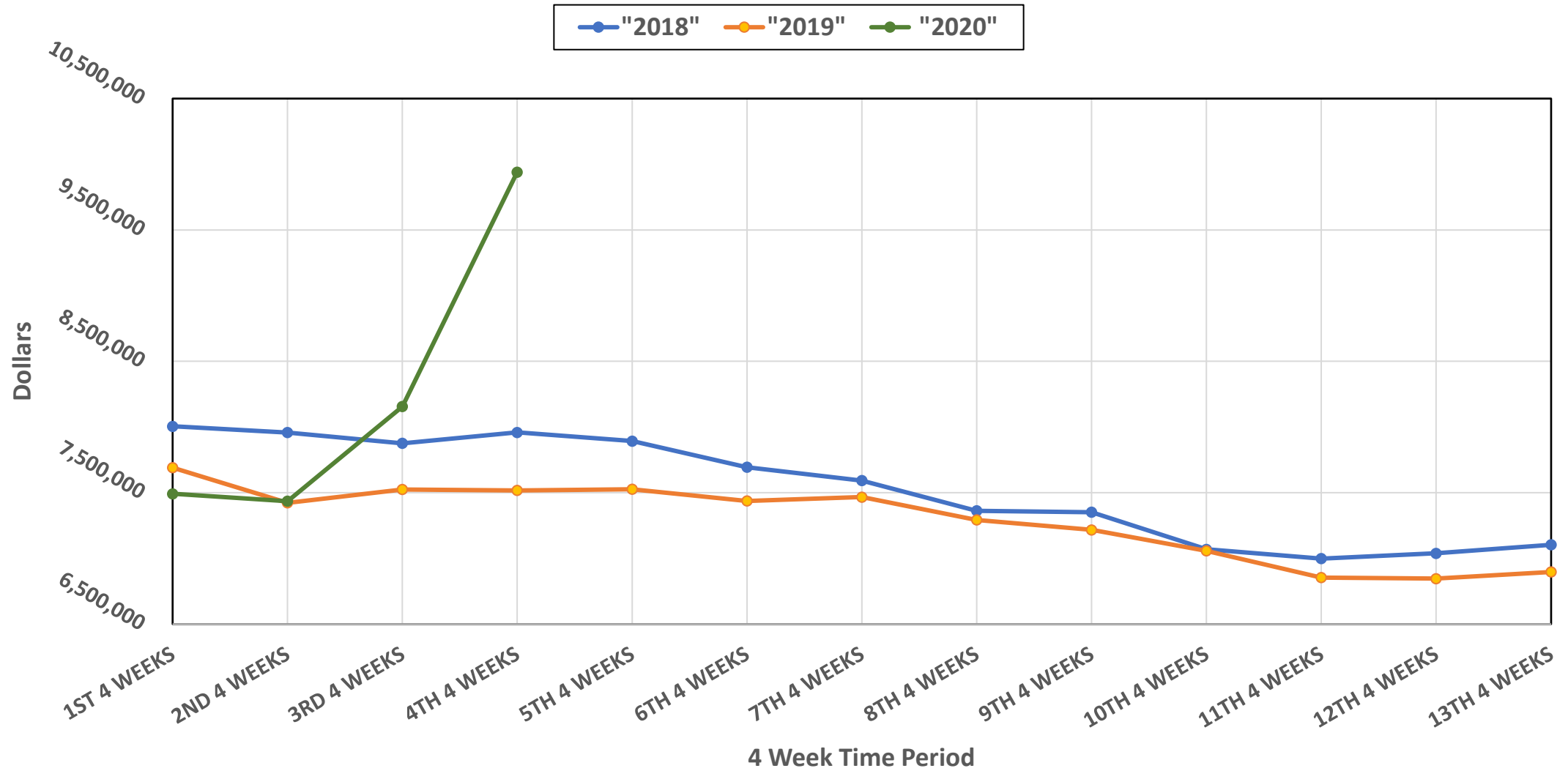
GJ Average Number of Items per Store Percent Change

% Chg in Items per Store	% Chg from 2018-19 to 2019-20*	% Chg from 2017-18 to 2018-19
NFC GJ	-4.48%	4.95%
RECON GJ	3.24%	-42.50%
FROZEN GJ	-5.73%	154.17%
SS GJ	-12.49%	-22.62%
Total GJ	-0.01%	-6.21%
*Season YTD		

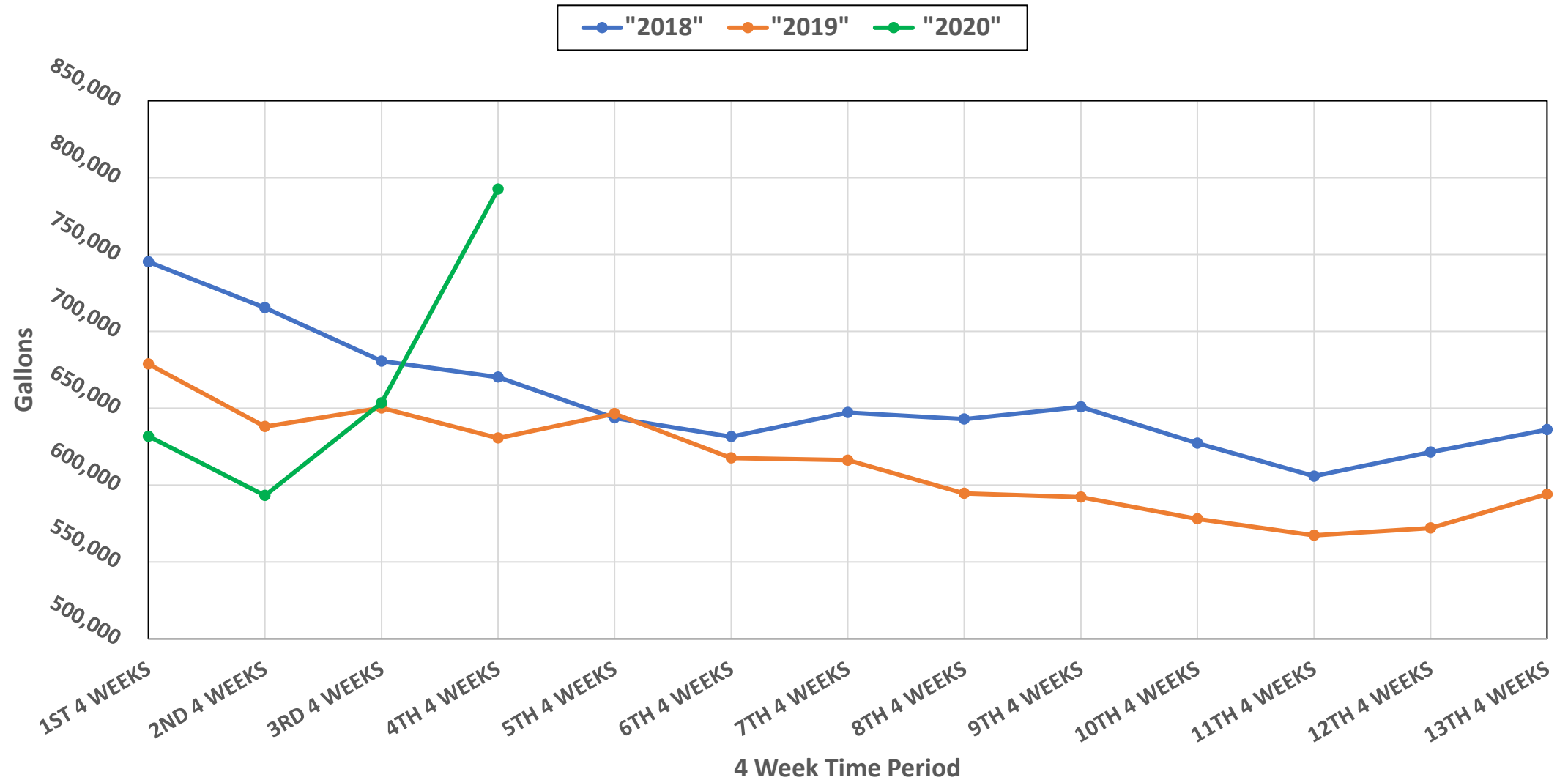
GJ Gallon Sales (Year-over-Year)



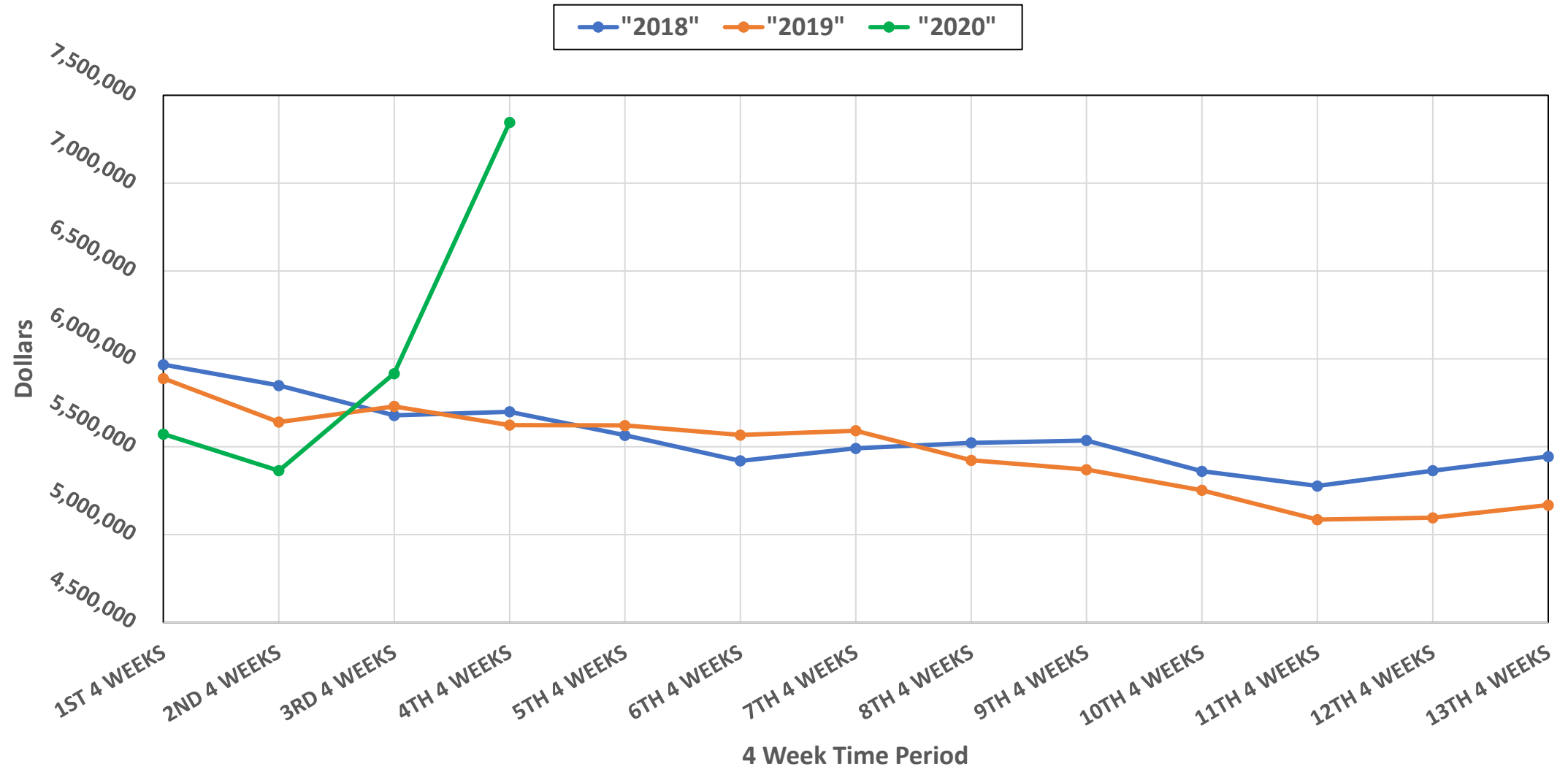
GJ Dollar Sales (Year-over-Year)



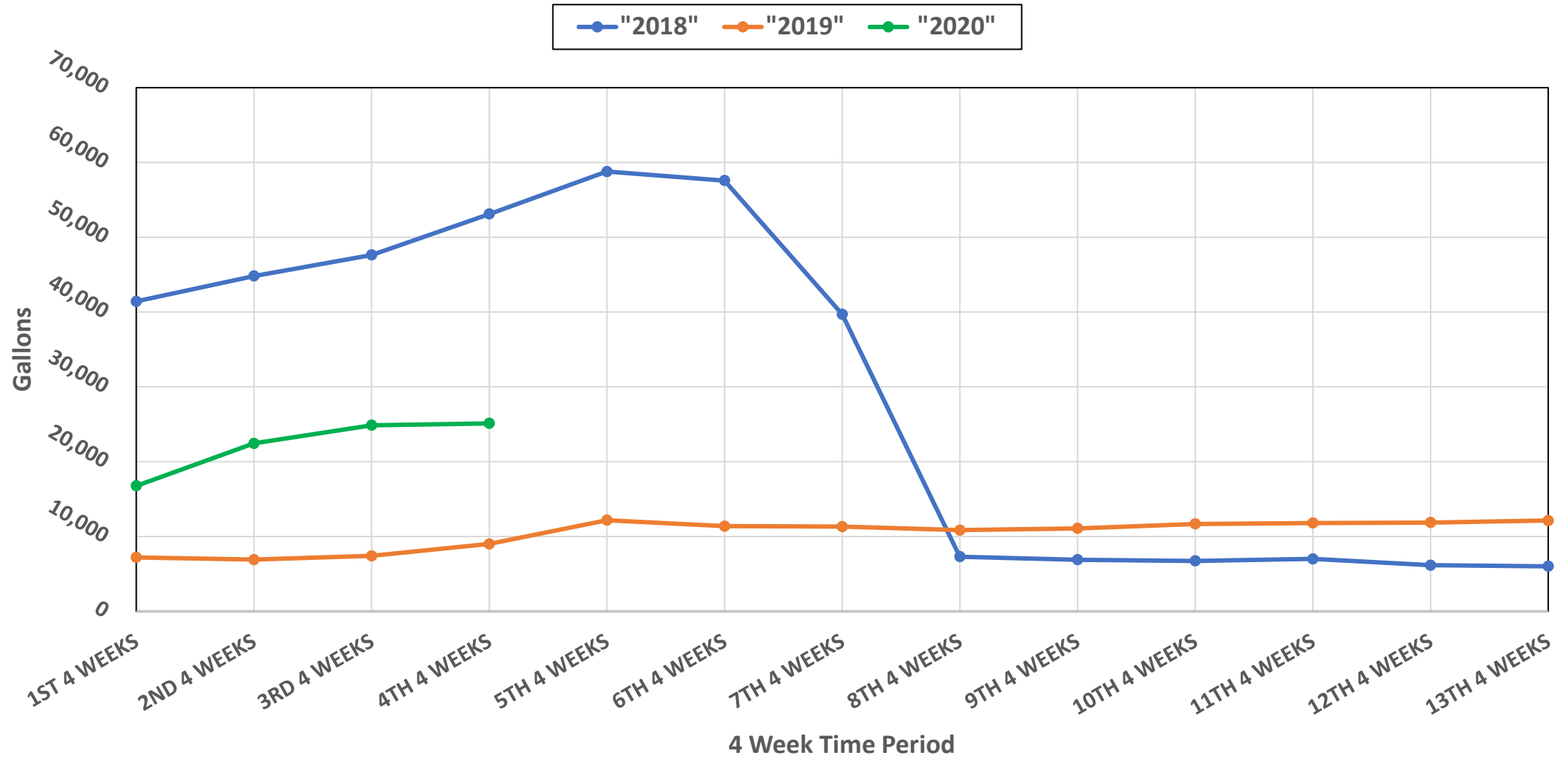
GJ REF NFC Gallon Sales (Year-over-Year)



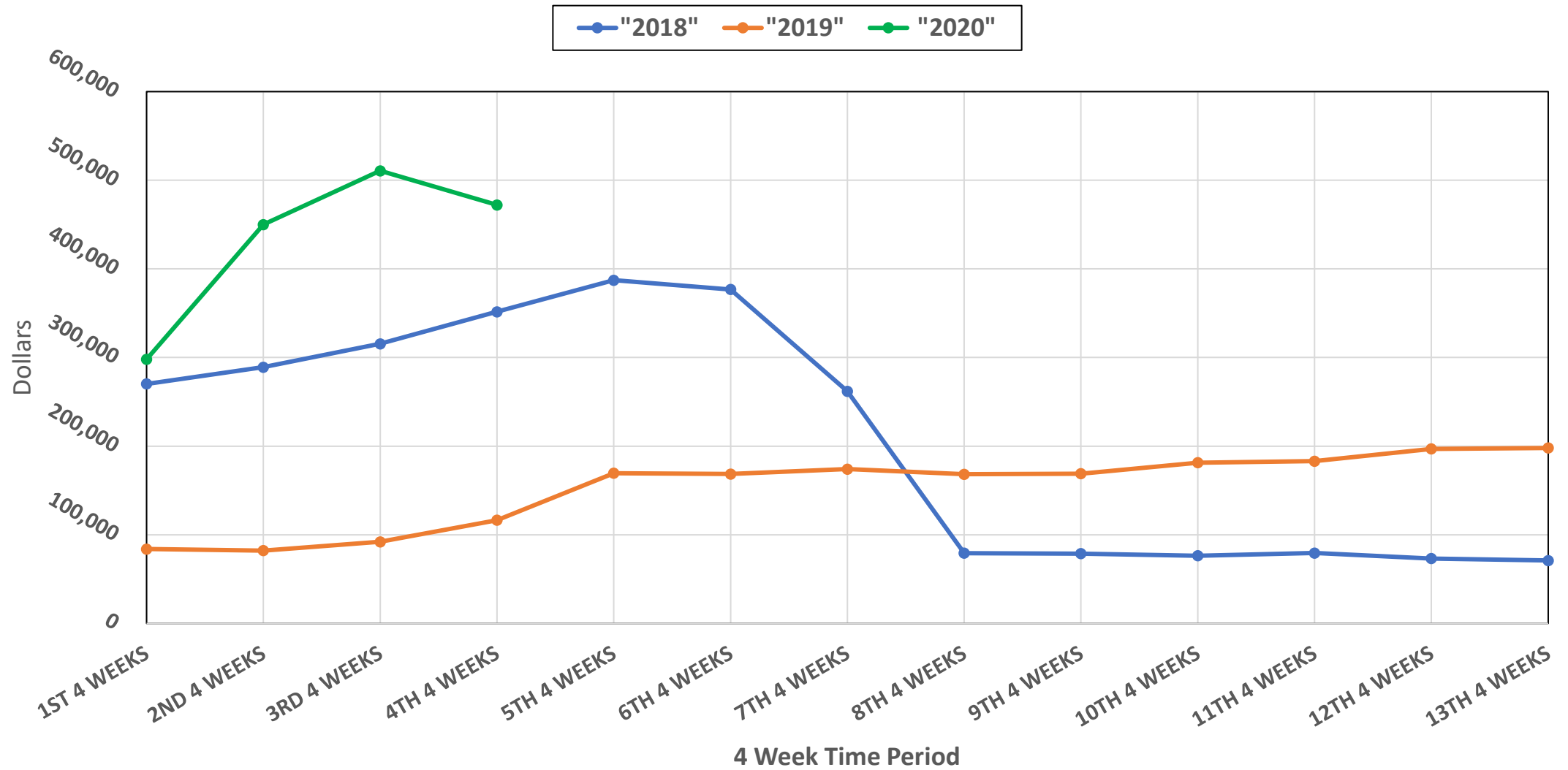
GJ REF NFC Dollar Sales (Year-over-Year)



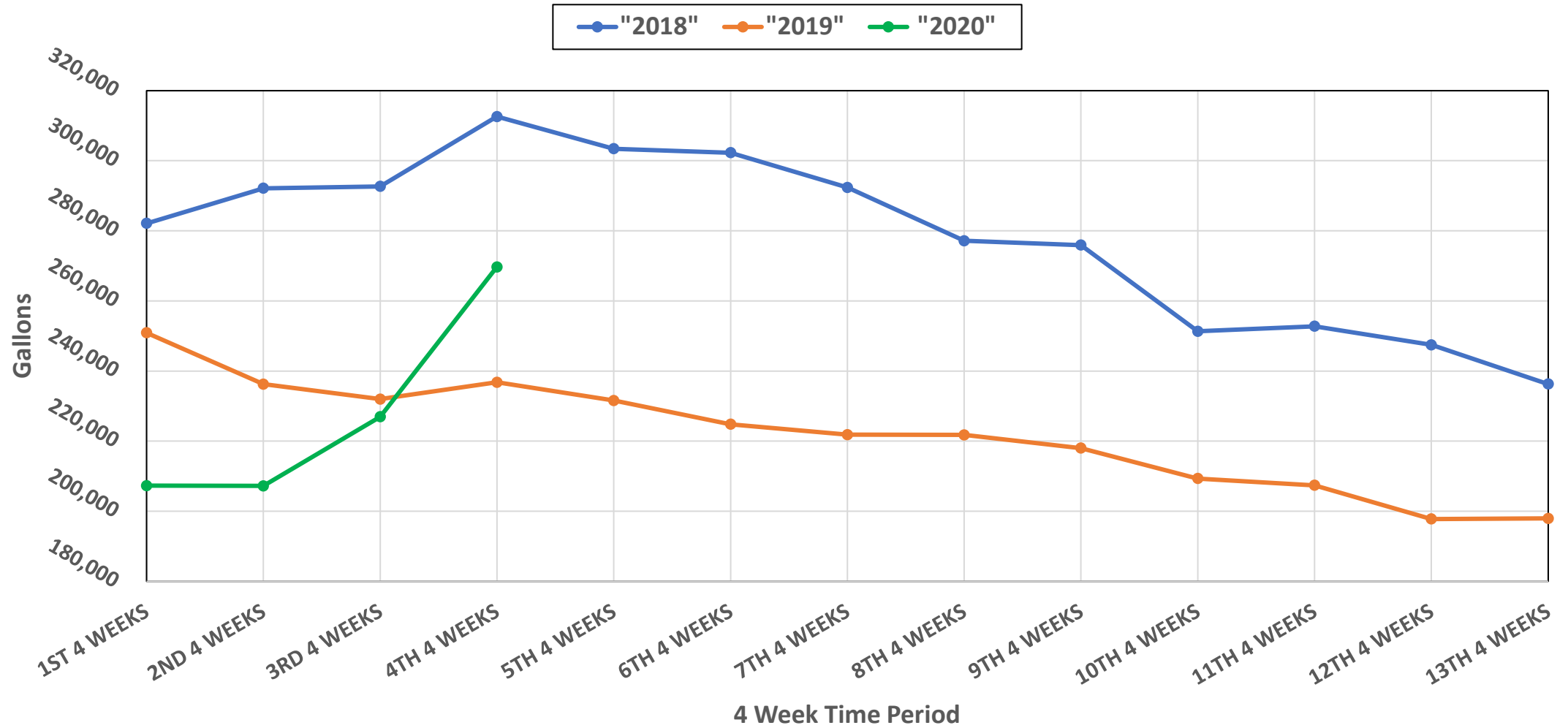
GJ REF RECON Gallon Sales (Year-over-Year)



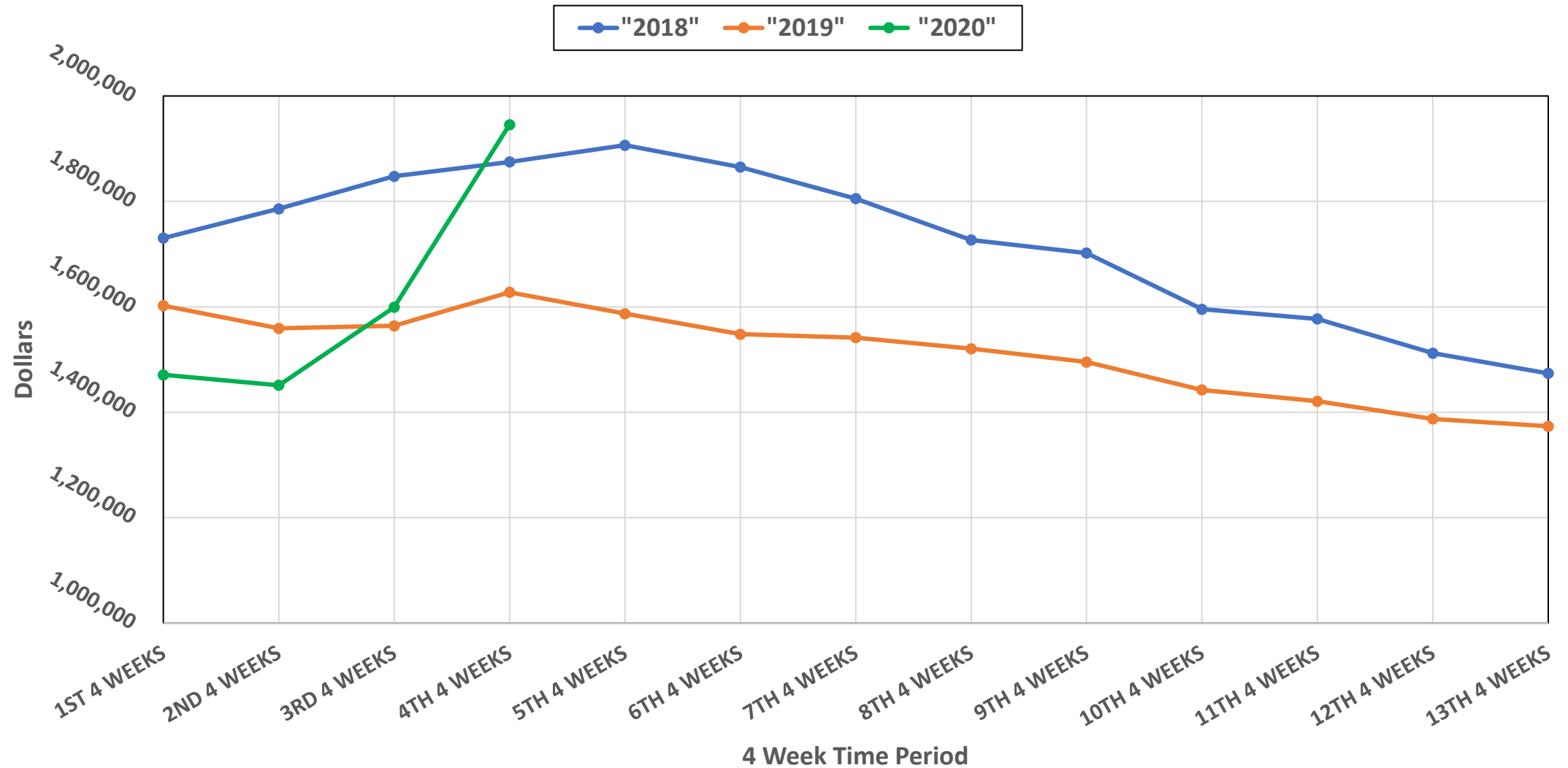
GJ REF RECON Dollar Sales (Year-over-Year)



GJ SS Gallon Sales (Year-over-Year)



GJ SS Dollar Sales (Year-over-Year)



Thank You

