
Introduction

Orange juice remains a fixture in supermarket assortments despite shifting consumer preferences, rising production costs, and climate-driven supply constraints. Its enduring presence reflects a combination of cultural familiarity, nutritional perception, and strategic retail positioning. Even as the category evolves through new formats, blended products, and expanded private label penetration, orange juice continues to function as a high-value anchor item that shoppers expect to find on shelves. This resilience underscores the product's unique role within both consumer behavior and the broader grocery ecosystem.

Why Consumers Continue to Choose Orange Juice

Consumer purchasing decisions are often driven by habit, trust, and perceived value. Orange juice benefits from all three. While consumption patterns continue to evolve, orange juice remains uniquely positioned within the supermarket.

- **Deep Cultural Roots** - Orange juice has been a breakfast staple for decades, maintaining strong emotional and habitual ties across generations. Unlike trend-driven beverages that rise and fall in popularity, orange juice has maintained a consistent presence in American households. This long-standing familiarity and association with family routines creates strong purchasing habits that are difficult to disrupt, even during periods of economic uncertainty or changing dietary trends.
 - **Health & Nutritional Perception** - Consumers continue to associate orange juice with vitamin C, immunity support, and convenient fruit intake, sustaining baseline demand. According to the Florida Department of Citrus, a single 8-ounce serving of 100% orange juice provides an entire day's recommended value of vitamin C, helping maintain its position as one of the most recognized health-oriented beverages available. Even as modern consumers scrutinize sugar content, orange juice continues to benefit from its natural, healthy and nutrient-rich image.
 - **The Convenience Factor** - Today's consumers increasingly seek foods and beverages that fit into their busy lifestyles. Orange juice offers a quick, convenient way to incorporate fruit and nutrients into daily routines without preparation or cleanup. This convenience remains particularly appealing to families and time-conscious shoppers.
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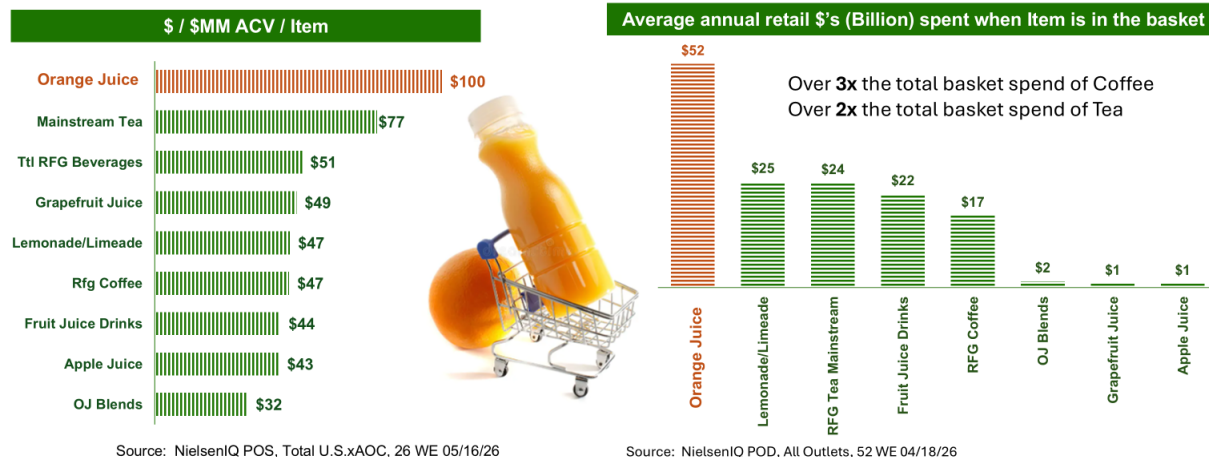
Why Retailers Should Prioritize Orange Juice

Orange juice remains an important category for supermarket retailers because it contributes to both sales performance and customer expectations.

- **A Destination Category** - Refrigerated juice remains a high turnover, high-visibility category and a frequently visited section of the store. Orange juice serves as the anchor product within the broader juice category, helping drive traffic and supporting adjacent product sales. According to NielsenIQ data, orange juice delivers the most productivity per item in the refrigerated beverage segment – making it a “win” for both retailers and customers alike. Shoppers expect to find orange juice on the shelf. Failure to maintain assortment can negatively impact customer satisfaction and store perception.

Orange Juice Delivers the Highest \$ Productivity per Item and the Largest total Basket Spend of any RFG Beverage segment

- Orange Juice delivers the most productivity per item, nearly 2x the category average and the only triple-digit segment
- Average annual retail \$'s spend with OJ in the basket is over 2x greater than any other segment



- **Appeal Across Demographics** - Orange juice resonates with multiple consumer segments, including families with children, health-conscious shoppers, older consumers and value-oriented households. As per NielsenIQ, orange juice has a 44% household penetration in the US (see below). This widely recognized segment contributes to consistent category demand.

OJ delivers dollars & drives traffic for the RFG Beverage Category

- Orange Juice is, by far, the largest segment within refrigerated beverages, reaching almost half of U.S. households
- Contributes 2.5x the dollars and over 2.7x the households of Coffee
- Generates over 2.3x the dollars and the households of Tea



Source: NielsenIQ POS, Total U.S.xAOC, 26 WE 05/16/26

Source: NielsenIQ POD, Total U.S. All Outlets, 52 WE 04/18/26

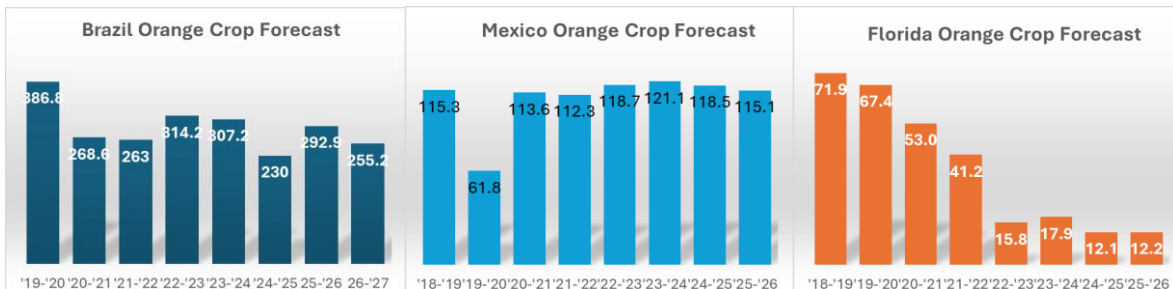
- **Private Label Opportunity** - As inflation has influenced shopping behavior, many consumers have become more willing to purchase store-brand products. According to the Private Label Manufacturers Association (PLMA), private label grocery sales reached record levels in 2024, as consumers increasingly sought value without sacrificing quality. Orange juice has been a major beneficiary of this trend, allowing retailers to strengthen margins while offering lower-priced alternatives to national brands.
- **Retention During Economic Pressure** - Orange juice consumers often continue to buy within the category even when prices rise. Rather than eliminating purchases altogether, shoppers tend to exhibit “trade-down behavior”, typically moving from premium brands to mainstream or private label brands, purchasing smaller sizes or choosing blended juices or reconstituted products over not-from-concentrate options. This trade-down behavior can help preserve category volume and retailer sales.

Industry Supply Challenges

The orange juice industry has experienced unprecedented supply disruption over the past two decades. Producers face several challenges that continue to reduce supply and raise costs across the globe.

Below is a look at the Orange Crop over the last 8 years.

- **Brazil:** 2026/27 forecast of 255MM is down 12.9% vs prior season, due to biennial production cycle pressure, climate conditions, premature fruit drop and greening.
- **Mexico: 115MM box 2025/26 forecast**, down -3% from last year; relatively stable supply, however quality is pressured.
- **Florida: 12.2MM box 2025/26 forecast** is modestly improved vs. prior forecast but still historically low, reinforcing supply fragility.



Forecast represented in millions of 90lbs boxes

Brazil Source: Brazilian Citrus Belt data only. CitrusIndustry.net. Fundecitrus. May 8th, 2026. Next update: Sept 10th, 2026

Mexico.: USDA Foreign Agricultural Services, Citrus: World Markets and Trade, Jan 2026) Next update Jan, 2027.

Florida Source: USDA National Agricultural Statistics Service. April 9th, 2026. Next update: July 10th, 2026; final 25/26 forecast

As demonstrated above, particularly in Brazil and Florida, the main factors impacting supply include disease, weather, and production costs.

- **Citrus Greening Disease** - Citrus greening disease has significantly reduced orange production in major growing regions, particularly Florida. According to USDA data, Florida orange production has declined by more than 90% since its peak in the late 1990s, creating substantial pressure on growers, processors, and retailers.
- **Extreme Weather** - Hurricanes, freezes, drought conditions, and flooding have negatively impacted citrus yields. Florida and Brazil - the world's two most important orange juice producing regions - have both experienced weather-related disruptions that contributed to reduced harvests and higher commodity costs.
- **Rising Production Costs** - Growers face increasing expenses related to disease management, labor, fertilizer, transportation, and water management. These pressures have translated into higher retail prices across the category.

Innovation Keeps the Category Relevant

Despite the challenges, orange juice continues to deliver sales, traffic, and merchandising opportunities for retailers. One reason the orange juice category remains resilient despite these

challenges is the industry's willingness to adapt. Producers mitigate supply volatility by offering blends, reconstituted formats, and value tier options that preserve affordability.

- **Expanded Product Formats** - Manufacturers now offer juices in numerous formats: Not-from-concentrate products, Traditional concentrate, Single-serve formats, Calcium-fortified varieties, Reduced-acid options and Functional juice blends.

These choices allow brands to appeal to a broader range of shoppers and price points.

- **Juice Blends and Functional Beverages** - Many manufacturers have expanded beyond traditional orange juice by incorporating Mango, Pineapple, Peach, Strawberry juices, Probiotic ingredients, and Additional vitamins and nutrients.

These products help attract younger consumers while leveraging the trust and familiarity associated with orange juice.

- **Value and Private Label Offerings** – While highly-popular national brands continue to enforce familiarity, trust & recognition in the category, more consumers are seeking value in terms of product size and/or price. Manufacturers can appeal to these preferences by producing value-sized packages and/or private brand offerings that are more competitively priced than the national name brands.

Closing Thoughts – and a Call to Action

Orange juice remains a supermarket staple not because the category has avoided disruption, but because it has successfully adapted to it.

Strong consumer loyalty, deep cultural roots, positive health perceptions, and strategic retail importance have allowed orange juice to remain relevant despite significant economic and supply-side challenges. At the same time, manufacturers and retailers have responded with innovative formats, expanded private label offerings, and diversified sourcing strategies that keep the category accessible to consumers.

Below are best practices and key recommendations for manufacturers, retailers and broker partners to take full advantage of orange juice's opportunities:

For Manufacturers

- **Diversify Sourcing Strategies** – Reduce supply risk by utilizing multiple sourcing regions and maintaining flexibility across concentrate, not-from-concentrate, and blended juice formulations.

- **Invest in Innovation** – Continue developing functional beverages, juice blends, fortified products, and convenient package formats that appeal to evolving consumer preferences.
- **Expand Value-Tier Offerings** – Provide a range of price points through private label programs, family-size packages, and reconstituted products to maintain accessibility during periods of inflation.
- **Communicate Product Benefits** – Highlight key nutritional attributes such as vitamin C content, fruit servings, and clean-label positioning to reinforce consumer trust and health perceptions.
- **Collaborate Closely with Retailers** – Share category insights, supply outlooks, and promotional strategies to help retailers optimize assortment and inventory management.

For Retailers

- **Maintain Core Assortment Availability** – Ensure consistent availability of key orange juice products, including premium, mainstream, and value-tier options, to meet shopper expectations and minimize lost sales.
- **Optimize Shelf Placement** – Position orange juice prominently within refrigerated beverage sets to maximize visibility and encourage cross-category purchases.
- **Use Data-Driven Category Management** – Monitor sales trends, shopper behavior, and demographic preferences to refine assortment decisions and allocate shelf space effectively.
- **Promote Trade-Down Alternatives** – When category pricing rises, highlight smaller sizes, blends, and private label offerings to retain shoppers within the category rather than losing purchases altogether.

For Broker Partners

- **Provide Market Intelligence** – Keep retailers and manufacturers informed on crop forecasts, commodity trends, supply disruptions, and competitive activity.
- **Identify Growth Opportunities** – Utilize category data to uncover assortment gaps, emerging consumer trends, and new product opportunities.
- **Support Promotional Planning** – Align promotional calendars with seasonal demand periods and category insights to maximize sales effectiveness.
- **Facilitate Strategic Partnerships** – Serve as the link between manufacturers and retailers, helping both parties navigate supply challenges and capitalize on growth opportunities.
- **Champion Category Development** – Use shopper and market data to reinforce orange juice's role as a destination category and advocate for continued investment in assortment and merchandising.

Success in the category will also depend on consistent promotion and merchandising support. Even with strong consumer loyalty, orange juice performs best when retailers actively highlight the category through advertising, displays, digital engagement, and value-driven promotions that keep the product top-of-mind for shoppers.

As shopper preferences continue to evolve, orange juice is likely to remain a foundational grocery item - one that balances tradition, nutrition, convenience, and value. For retailers, maintaining a strong orange juice assortment is not simply about preserving shelf space; it is about meeting consumer expectations and supporting a category that continues to earn its place in the shopping basket.

The juice, it turns out, is still worth the squeeze.

