RESEARCH PAPER: 2000-4

U.S. ORANGE JUICE AND GRAPEFRUIT JUICE DEMANDS: ACNIELSEN SALES VERSUS FCPA MOVEMENT

BY

Mark G. Brown

Senior Research Economist

FLORIDA DEPARTMENT OF CITRUS

Economic and Market Research Department

P.O. Box 110249

Gainesville, Florida 32611-2049 USA

Phone: 352-392-1874

Fax: 352-392-8634

Email: mgbrown@ufl.edu

www.floridajuice.com

U.S. Orange Juice and Grapefruit Juice Demands: ACNielsen Sales Versus FCPA Movement

The purpose of this paper is to compare ACNielsen volume sales of orange juice (OJ) and grapefruit juice (GJ) versus Florida Citrus Processors Association (FCPA) movement of OJ and GJ. Although both of these measures provide indications of the strength of demand for Florida OJ and GJ, they are defined differently and, hence, may substantially differ at times.

Orange Juice

ACNielsen volume sales indicate U.S. demand for OJ in grocery store chains doing at least $2 million business annually, super centers, drug stores and mass merchandising outlets. These sales account for an estimated 54% of 1999-00 U.S. consumption of OJ (Table 1), with the remaining consumption occurring in smaller retail outlets, restaurants and fast food outlets, schools, hospitals and other institutional outlets. The ACNielsen sales are a measure of final consumer demand (recorded at grocery store check-out scanners) for all OJ regardless of origin. All of the ACNielsen sales are in packaged form.

In contrast, FCPA movement of OJ measures the demand for OJ produced by FCPA members. The OJ could have originated from Florida's orange crop or been imported from elsewhere in the U.S. or other countries. Both packaged and bulk product movement are covered. FCPA movement measures aggregate world demand for Florida product, although the largest portion of this demand originates in the U.S. The U.S. portion of FCPA movement accounts for part of the ACNielsen sales, as well as part of the sales in non-ACNielsen outlets. The major non-Florida supplier of OJ to the U.S. is Brazil. Much of Brazil's OJ, as well as other foreign product, is imported around Florida, packaged close to the final consumers, and is sold in both the ACNielsen and non-ACNielsen markets.

Table 2 summarizes the differences in FCPA movement and ACNielsen sales. A flow chart showing major links between the ACNielsen market and OJ supplies from Florida and elsewhere is provided in Figure 1. FCPA movement for chilled orange juice (COJ) and frozen concentrated orange juice (FCOJ) are shown in Tables 3 through 5. COJ movement includes both not-from-concentrate (NFC) OJ and reconstituted (RECON) OJ movement. Estimates of movement for these two categories are shown in Tables 3 and 5. Tables 6 through 9 provide similar data for the GJ situation.

Orange and Grapefruit Juice Availability and Disposition

It is helpful in comparing ACNielsen volume sales and FCPA movement to trace where the OJ or GJ in the U.S. comes from, where it goes and what volumes we can track. The major stocks and flows for OJ and GJ are shown in Figure 1. What we do not know about the stocks and flows are shaded. The discussion here will focus on the OJ situation but the general stocks and flows noted also apply to GJ.

The OJ in the U.S. market originates from Florida inventory, U.S. inventory outside Florida, Florida production, other U.S. production (California, Arizona, Texas), and foreign imports. We know or can reasonably estimate the levels of these supplies, except the inventory held outside Florida and, in the case of NFC and FCOJ separately, U.S. production outside of Florida. Supply from these sources makes up the available OJ in Florida and outside Florida. Florida availability can be determined from reported data, but, given outside Florida inventories, as well as, separate NFC and FCOJ production in the U.S. outside of Florida, are unknown, outside Florida availability is unknown.

In any given period, say a season, the available OJ in Florida is moved in the form of packaged or bulk product, or is stored in inventory. The movement is to the U.S. or export markets. Florida's packaged movement to the U.S. market goes to both the ACNielsen and non-ACNielsen market segments. We do not know this split. A major portion of Florida's bulk movement also goes to U.S. processors outside of Florida, from which, it is moved to the ACNielsen and non-ACNielsen U.S. market segments, export markets or goes into inventory. The amounts of product going to these markets are unknown.

As the shaded areas in Figure 1 show, there are many unknowns in tracing what happens to the OJ and GJ in the U.S., making it difficult, at times, to reconcile the data on ACNielsen volume sales and FCPA movement.

NFC

The differences between the FCPA and ACNielsen measures of OJ demand are prominent for the NFC OJ category. In 1999-00 (October-September), ACNielsen NFC gallon sales were up 8.0% or 23 million gallons from last season (1999-00 sales at 309.5 million gallons versus 1998-99 sales at 286.5 million gallons). As can be gleaned from the flow chart in Figure 1, there are four sources of NFC in the ACNielsen market --- 1.) Florida NFC packaged in Florida, 2) Florida Bulk NFC shipped to another state and packaged there, 3) NFC from California, Arizona and Texas, and 4) foreign NFC imports (around Florida). In aggregate these four categories should account for the additional 23 million gallons of NFC in the ACNielsen market segment, but the supplies from any specific category could be up, down or constant compared to last season. The change in NFC supplies in each of these four categories is considered in turn below.

First, consider the NFC supplies from Florida (Table 3). Beginning with the COJ category, note that FCPA movement of COJ in 1999-00 was down by 1.7% or 10 million gallons (1999-00 movement at 578 million gallons versus 1998-99 movement at 588 million gallons, line 16 in the table). Disaggregating COJ into NFC and RECON, FCPA movement of NFC in 1999-00 decreased by an estimated 2.3% or 11 million gallons (1999-00 movement at 492 million gallons versus 1998-99 movement at 503 million gallons, line 9 in the table). NFC movement could be packaged product going to the U.S. ACNielsen market, the remaining U.S. market and exports markets, as well as, bulk product going to U.S. processors outside of Florida and foreign processors. In 1999-00, FCPA packaged movement of NFC going to the U.S. market appears to have been roughly flat--- it was estimated that this portion of NFC movement slightly decreased by .2% or .4 million gallons (1999-00 movement at 266.3 million gallons versus 1998-99 movement at 266.7 million gallons, line 15 in the table)[1]. The ACNielsen market takes a share of Florida's packaged NFC movement going to the U.S. market, and, to the extent that this share has been constant in 1998-99 and 1999-00, FCPA packaged movement of NFC to the ACNielsen market would also have been flat. Hence, based on the foregoing estimates and assumptions, the 23 million gallon increase in ACNielsen NFC OJ sales does not seem to have come from Florida packaged NFC, unless ACNielsen's share of Florida's domestic packaged NFC movement was up from a year ago.

The second point concerns supplies of bulk NFC from Florida reaching the ACNielsen market indirectly via an out-of-state processor. Bulk NFC sales to the domestic market were down by an estimated 4.6% in 1999-00 (line 12 in the table). Hence, the portion of these bulk sales that are packaged and sent to the ACNielsen stores would have had to been significantly up to explain the ACNielsen NFC volume increase.

The third point may provide a possible explanation; that is, production and movement of NFC in California, Arizona and Texas were up. However, data on NFC production/movement for these states is not available to make a further determination.

Lastly, an increase in foreign imports seems to be an unlikely explanation for the ACNielsen NFC volume increase. Foreign imports of NFC OJ around Florida were down about 1.5 million gallons during the first 10 months (October through July) of 1999-00 (U.S. Department of Commerce). In contrast, NFC foreign imports into Florida were up by 2.4 million gallons based on the same data. It should be noted that imports held in bonded warehouses are not counted by the U.S. Department of Commerce, so that 1999-00 imports could be higher to the extent foreign product is being held in bonded warehouses[2].

Overall, the most likely explanations for the increase in NFC sales in the ACNielsen market seem to be an increase in NFC supplies from California, Arizona and Texas; an increase in the amount of Florida Bulk NFC that is packaged outside Florida and shipped to ACNielsen markets; and an increase in ACNielsen's share of Florida's domestic packaged NFC movement.

1

The estimate of NFC package movement to the U.S. market is based on two assumptions: 1) bulk COJ is NFC and 2) COJ packaged exports are NFC. In some cases, however, these assumptions may be incorrect (e.g, some COJ packaged exports could be RECON, say, to Canada), which would introduce an error in the estimate of domestic package movement of NFC.

2

The U.S. Department of Commerce only counts tariff paid imports, and the tariff is not paid on foreign product held in a bonded warehouse until it is withdrawn.

FCOJ and RECON

Next, consider retail FCOJ. In 1999-00, ACNielsen FCOJ gallon sales were down 9.7% or 16 million single strength equivalent (SSE) gallons from last season (1999-00 sales at 148.3 million gallons versus 1998-99 sales at 164.3 million gallons). In comparison, 1999-00 FCPA movement of retail packaged FCOJ product to the domestic market was down 10.3% from the previous season (1999-00 movement at 142.3 million gallons versus 1998-99 movement at 158.6 million gallons, line 9 in Table 4). This comparison suggests that, for retail FCOJ, FCPA movement and ACNielsen volume sales are following the same trend.

Finally, consider RECON. In 1999-00, ACNielsen RECON gallon sales were up 2.9% or 11 million gallons from last season (1999-00 sales at 401.3 million gallons versus 1998-99 sales at 390.1 million gallons). Some of this RECON is packaged in Florida and some is packaged outside of Florida. The RECON packaged outside of Florida could be from Florida or other suppliers. In 1999-00, FCPA movement of bulk FCOJ to the domestic market was 671 million SSE gallons, up 6.3% from last season (Table 4, line 13) . Much of this product is made into RECON and is sold in the ACNielsen and non-ACNielsen markets; the amounts, however, are not reported. On the other hand, FCPA data on the amount of RECON produced in Florida is available, from which Florida packaged RECON movement is estimated to have increased by 1.9% from 1998-99 to 1999-00 (Table 3, line 8), indicating that FCPA movement and ACNielsen volume sales are following the same trend.

Further understanding of the volume changes in the FCOJ and RECON categories would require similar information as in the case of NFC. The four supply categories for NFC discussed above can be redefined for RECON and FCOJ --- 1.) Florida RECON or FCOJ product packaged in Florida, 2) Florida Bulk FCOJ shipped to an out-of-state processor and made into RECON or FCOJ package product, 3) RECON or FCOJ from California, Arizona and Texas, and 4) foreign FCOJ imports (around Florida) made into RECON or FCOJ packaged product. Supply changes in these categories should explain the 16 million gallon decrease in the ACNielsen FCOJ market and the11 million gallon increase in the ACNielsen RECON market. However, determination of the amounts of RECON and FCOJ originating from each of these categories and sent to the ACNielsen market is problematic due to the unknowns that are highlighted in Figure 1 and the foreign and other U.S. supply competition which is greater for these categories than for NFC.

The aggregate COJ and FCOJ situation is shown in Table 5. Aggregate COJ- FCOJ movement (domestic and export) is estimated to have increased by .6% from 1998-99 to1999-00 (line 14 in the table).

Grapefruit Juice

The definitions of ACNielsen volume sales and FCPA movement for GJ are similar to those discussed above for OJ, and, as many of above comments on OJ also apply to GJ, the discussion in this section will brief.

First, note that ACNielsen GJ volume sales account for an estimated 37% and 40% of 1998-99 and 1999-00 U.S. consumption of GJ, respectively (Table 6). Recall that ACNielsen volume sales for OJ were 54% of estimated U.S. OJ consumption in 1999-00. That is, there is larger share of GJ sold in non-Nielsen outlets compared to OJ[3]. Due to this larger GJ share and less complete FCPA data for GJ, compared to that for OJ, it is more difficult to analyze the the various GJ segments.

1999-00 ACNielsen volume sales for NFC-GJ, RECON GJ and frozen concentrated grapefruit juice (FCGJ) were down 2.8%, 27.8% and 23.3%, respectively, from a year ago. In comparison, FCPA 1999-00 movement levels for chilled grapefruit juice (CGJ), RECON and FCGJ were down from a year ago by 14.4%, 59.6% and 23.9%, respectively, while movement of NFC-GJ was up by an estimated 2.7% (Tables 7 and 8). The differences between the ACNielsen and FCPA volume changes appear to be due to differences in market coverage, with FCPA movement being for the entire U.S. and export markets versus ACNielsen sales representing roughly 40% or less of the U.S. market.

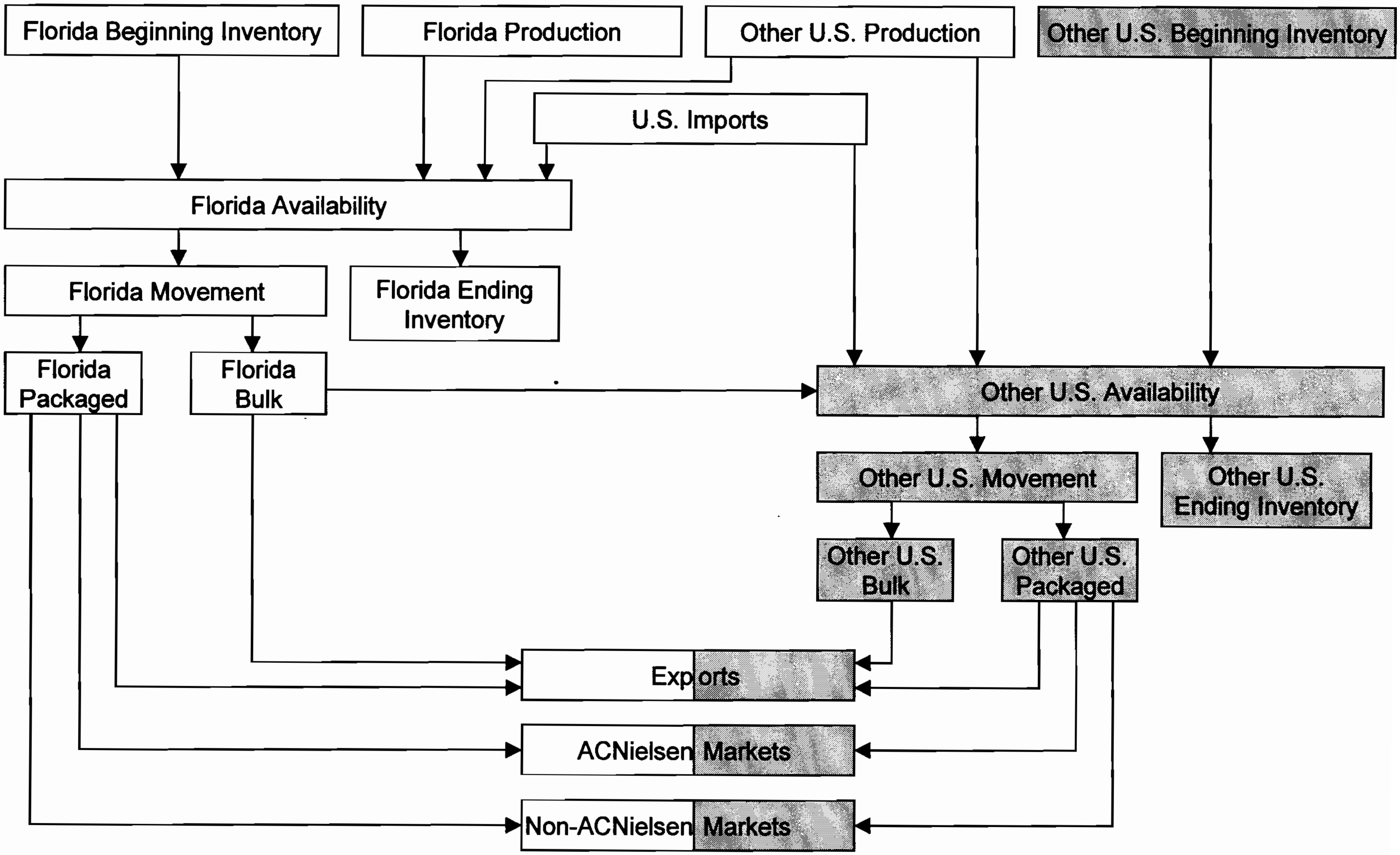
In 1999-00, ACNielsen total GJ gallon sales were down 16.6% or 9.8 million gallons from last season (1999-00 sales at 49.5 million gallons versus 1998-99 sales at 59.3 million gallons). In comparison, FCPA GJ movement decreased by an estimated17.5% (Table 9, line 8). CGJ exports were not reported in 1998-99, so that the 1998-99-to-1999-00 change in total FCPA exports of GJ and, hence, domestic movement could not be determined, but, based on U.S. Department of Commerce data, U.S. GJ exports are estimated to be up from 24.3 million gallons in1998-99 to 31.5 million gallons in 1999-00. Assuming Florida accounts for nearly all of the U.S. GJ exports, these Department-of-Commerce export estimates can be subtracted from line 8 of Table 9 to find that FCPA domestic GJ movement may have declined 25.3% from 145.3 million gallons in 1998-99 to 108.5 million gallons in 1999-00. Given the percentage decline in domestic GJ movement (25.3%) is larger than the percentage decline in ACNielsen volume sales (16.6%), the percentage decline in the non-ACNielsen portion of the U.S. would appear to be larger than that for ACNielsen portion.

3

ACNielsen volume sales and FCPA movement of OJ and GJ discussed here are 100% juice products. However, an additional amount of GJ is sold in ACNielsen outlets in the form of GJ cocktail and other (less than 100%) juice drinks; an additional amount of OJ is also sold in ACNielsen outlets in the form of juice drinks.

Figure 1

Orange & Grapefruit Juice Availability & Disposition*



*Shaded areas denote unknown volumes.

Table 1. U.S. Presumed OJ Consumption Versus ACNielsen OJ Sales (a).

		1998-99	1999-00	% Change
1	Presumed OJ Consumption			
2	Availability	Million SSE Gallons		
3	Beg. Inv. (b)	629.8	512.6	-18.6%
4	Florida Prod. (c)	1154.6	1422.5	23.2%
5	Other U.S. Prod. (d)	71.4	78.8	10.4%
6	Imports (e)	350.1	340.0	-2.9%
7	Total	2205.9	2353.9	6.7%
8	Movement			
9	Exports (e)	144.9	147.0	1.4%
10	U.S. Presumed Cons.	1548.4	1599.2	3.3%
11	Total	1693.3	1746.2	3.1%
12	Ending Inv. (b)	512.6	607.7	18.6%
13	ACNielsen OJ Sales			
14	Volume Sales	850.3	867.7	2.0%
15	Percent of Presumed Cons.	54.9%	54.3%	-1.2%

(a) In grocery store chains doing at least $2 million business annually, super centers, drug stores and mass merchandising outlets.

(b) FCPA: Florida inventory only (1998-99 ending and 1999-00 beginning and ending canned inventory estimated at 1 million SSE gallons); assumes U.S. inventories outside of Florida remain unchanged.

(c) FDOC estimate based on FCPA and FASS reports.

(d) FASS and industry sources.

(e) U.S. Department of Commerce.

Table 2. Definitions of ACNielsen Sales and FCPA Movement.

I. ACNielsen Sales.

- A Coverage: U.S. retail grocery stores with over $2 million annual sales including super centers.
- B. Packaged goods only.
- C. Source of product: Florida, California, Arizona, Texas, and U.S. imports.

II FCPA Movement.

- A Coverage: Total U.S. (retail plus non-retail sales) plus exports.
- B Packaged goods and bulk.
- C. Source of product: Florida, foreign and domestic imports.
- D. Movement does not double count inter-processor sales.

Table 3. Florida COJ Availability, Movement, and Carry-Over (a).

		98/99	99/00	
		Million SSE Gallons		% Change
1	AVAILABILITY			
2	BEG. INV.	83.7	86.7	3.6%
3	PACK FROM FRUIT	505.5	558.8	10.5%
4	FROM CONCENTRATE	85.1	86.7	1.9%
5	OTHER NET SUPPLIES (b)	0.5	9.1	1855.4%
6	TOTAL	674.8	741.3	9.9%
7	MOVEMENT			
8	RECON (c)	85.1	86.7	1.9%
9	NFC (d)	503.0	491.6	-2.3%
10	BULK	203.1	201.4	-0.8%
11	EXPORTS (e)	28.3	34.5	21.9%
12	DOMESTIC	**174.8**	**166.8**	-4.6%
13	PACKAGED	299.9	290.2	-3.2%
14	EXPORTS (f)	33.2	24.0	-27.8%
15	DOMESTIC	**266.7**	**266.3**	-0.2%
16	TOTAL	588.1	578.3	-1.7%
17	C.O.	86.7	163.0	88.0%
18	WEEKS	7.7	14.7	91.2%

(a) FCPA members.

(b) Foreign and domestic imports, and receipts from of Florida product from non-members.

(c) Assumes RECON (made from FCOJ) is shipped and not stored.

(d) Alternatively, NFC movement can be estimated assuming bulk stocks are NFC only and the level of NFC packaged inventories remains unchanged from season to season:

	98/99	99/00
	Million SSE Gallons	
BULK BEG. INV.	81.1	83.3
PACK FROM FRUIT	505.5	558.8
OTHER NET SUPPLIES (a)	0.5	9.1
TOT. AVAIL.	587.0	651.2
NFC MOVEMENT	503.8	491.8
BULK END. INV.	83.3	159.4

(e) 1998-99 FCPA bulk exports are not reported, but estimated based on U.S. Department of Commerce data. For the first 10 months of the 1999-00 season (October through July), U.S. exports of NFC OJ were down 1.9 million gallons (58.1 million gallons in 1998-99 versus 56.2 million gallons in 1999-00); for the season, U.S. exports are estimated to be down 3 million gallons. 1999-00 FCPA exports of NFC were 48 million gallons from October through July or 85% of the U.S. Department of Commerce level; assuming that FCPA and U.S. Department of Commerce data follow the same trend, FCPA exports of NFC are estimated to also be down by 3 million gallons for the entire 1999-00 season. Given 1999-00 FCPA packaged NFC exports are down by 9.2 million gallons, bulk NFC exports are estimated to be up by 6.2 million gallons.

(f) May include some RECON, particularly exports to Canada.

Source: FCPA.

Table 4. Florida FCOJ Availability, Movement, and Carry-Over (a).

		1998-99	1999-00	1998-99	1999-00	
		Mil. 42 Deg. Brix Ga.		Mil. SSE Ga.		% Change
1	AVAILABILITY					
2	BEG. INV.	135.0	105.2	545.2	424.9	-22.1%
3	PACK	158.9	207.7	641.8	838.9	30.7%
4	OTHER NET SUPPLIES (b)	49.40	39.4	199.5	159.1	-20.2%
5	TOT. AVAIL.	343.3	352.3	1386.5	1422.9	2.6%
6	MOVEMENT					
7	RETAIL					
8	Export	1.8	0.5	7.3	1.9	-74.7%
9	Domestic	39.3	35.2	158.6	142.3	-10.3%
10	Total	41.1	35.7	166.0	144.2	-13.1%
11	BULK					
12	Export	13.5	13.1	54.4	52.8	-3.0%
13	Domestic	156.3	166.2	631.4	671.4	6.3%
14	Total	169.8	179.3	685.8	724.2	5.6%
15	INSTITUTIONAL					
16	Export	0.5	0.5	2.0	2.0	1.0%
17	Domestic	26.7	27.0	107.8	109.0	1.1%
18	Total	27.2	27.5	109.9	111.1	1.1%
19	TOTAL	238.1	242.5	961.7	979.4	1.8%
20	C.O.	105.2	109.8	424.9	443.5	4.4%
21	WEEKS	23.0	23.5	23.0	23.5	2.5%

(a) FCPA members.

(b) Domestic receipts by members of Non-Florida product; Florida product received by members from non-members; futures receipts minus futures deliveries; foreign imports; reprocessed frozen concentrated tangerine juice; chilled OJ used in FCOJ; net loss or gain during reprocessing; definitional adjustments.

Source: FCPA.

Table 5. Total FCOJ-COJ Availability, Movement, and Carry-Over.

		FCOJ		COJ		TOTAL		
		1998-99	1999-00	1998-99	1999-00	1998-99	1999-00	
		Million SSE Gallons						% Change
1	AVAILABILITY							
2	BEG. INV.	545.2	424.9	83.7	86.7	628.9	511.6	-18.7%
3	PACK	641.8	838.9	505.5	558.8	1147.3	1397.7	21.8%
4	FCOJ TO RECON			85.1	86.7	(a)	(a)	
5	COJ TO FCOJ	2.7	0.1			(b)	(b)	
6	OTHER NET SUPPLIES (c)	196.8	159.0	0.5	9.1	197.3	168.1	-14.8%
7	TOT. AVAIL.	1386.5	1422.9	674.8	741.3	1973.5	2077.3	5.3%
8	MOVEMENT							
9	RETAIL	166.0	144.2			166.0	144.2	-13.1%
10	BULK (d)	685.8	724.2			600.7	637.5	6.1%
11	INST.	109.9	111.1			109.9	111.1	1.1%
12	RECON			85.1	86.7	85.1	86.7	1.9%
13	NFC (e)			503.0	491.6	500.3	491.5	-1.8%
14	TOTAL	961.7	979.4	588.1	578.3	1461.9	1470.9	0.6%
15	C.O.	424.9	443.5	86.7	163.0	511.6	606.5	18.5%

(a) Included in FCOJ pack.

(b) Included in NFC pack.

(c) Domestic receipts by members of Non-Florida product; Florida product received by members from non-members; futures receipts minus futures deliveries; foreign imports; reprocessed frozen concentrated tangerine juice; chilled OJ used in FCOJ; net loss or gain during reprocessing.

(d) Total bulk movement excludes movement to COJ, which in turn, becomes RECON movement.

(e) Total NFC movement excludes movement to FCOJ.

Source: FCPA.

Table 6. U.S. Presumed GJ Consumption Versus ACNielsen GJ Sales (a).

1	Presumed GJ Consumption	1998-99	1999-00	% Change
2	Availability	Million SSE Gallons		
3	Beg. Inv. (b)	84.9	52.8	-37.8%
4	Florida Prod. (c)	140.4	170.0	21.1%
5	Other U.S. Prod. (d)	12.2	13.4	9.8%
6	Imports (e)	0.3	5.0	1566.7%
7	Total	237.8	241.2	1.4%
8	Movement			
9	Exports (e)	24.3	31.5	29.6%
10	U.S. Presumed Cons.	160.7	125.1	-22.2%
11	Total	185.0	156.6	-15.4%
12	Ending Inv. (b)	52.8	84.6	60.2%
13	ACNielsen OJ Sales			
14	Volume Sales	59.3	49.5	-16.6%
15	Percent of Presumed Cons.	36.9%	39.6%	7.1%

(a) In grocery store chains doing at least $2 million business annually, super centers, drug stores and mass merchandising outlets.

(b) FCPA: Florida inventory only (1998-99 ending and 1999-00 beginning and ending canned inventory estimated at 1 million SSE gallons); assumes U.S. inventories outside of Florida remain unchanged.

(c) FDOC estimate based on FCPA and FASS reports.

(d) FASS and industry sources.

(e) U.S. Department of Commerce.

Table 7. Florida CGJ Availability, Movement, and Carry-Over (a).

		98/99	99/00	
		Millions SSE Gallons		% Change
1	AVAILABILITY			
2	BEG. INV.	12.9	11.4	-11.7%
3	PACK FROM FRUIT	39.4	51.8	31.5%
4	FROM CONCENTRATE	15.5	6.3	-59.6%
5	OTHER NET SUPPLIES (b)	0.01	0.01	-16.7%
6	TOTAL	67.8	69.4	2.5%
7	MOVEMENT			
8	RECON (c)	15.5	6.3	-59.6%
9	NFC (d)	40.9	42.0	2.7%
10	BULK	13.8	14.5	5.5%
11	EXPORTS	NA	5.1	NA
12	DOMESTIC	NA	9.4	NA
13	PACKAGED	27.1	27.5	1.3%
14	EXPORTS (f)	NA	2.8	NA
15	DOMESTIC	NA	24.7	NA
16	TOTAL	56.4	48.3	-14.4%
17	C.O.	11.4	21.2	86.0%
18	WEEKS	10.5	22.8	117.2%

(a) FCPA members.
(b) Foreign and domestic imports, and receipts of Florida product from non-members.
(c) Assumes RECON (made from FCGJ) is shipped and not stored.
(d) Alternatively, NFC movement can be estimated assuming bulk stocks are NFC only and the level of NFC packaged inventories remains unchanged from season to season:

	98/99	99/00
	Mil. SSE Ga.	
BULK BEG. INV.	12.2	10.7
PACK FROM FRUIT	39.4	51.8
OTHER NET SUPPLIES (a)	0.01	0.01
TOT. AVAIL.	51.6	62.5
NFC MOVEMENT	40.9	41.8
BULK END. INV.	10.7	20.7

(f) May include some RECON, particularly exports to Canada.
Source: FCPA.

Table 8. Florida FCGJ Availability, Movement, and Carry-Over (a).

		1998-99	1999-00	1998-99	1999-00	
		Mil. 40 Deg. Brix Ga.		Million SSE Gallons		% Change
1	AVAILABILITY					
2	BEG. INV.	17.6	10.1	70.4	40.4	-42.6%
3	PACK (b)	24.7	30	98.8	120.0	21.5%
4	TOT. AVAIL.	42.3	40.1	169.2	160.4	-5.2%
5						
6	MOVEMENT					
7	DOMESTIC & EXPORT					
8	RETAIL & INST.	1.4	1.0	5.4	3.9	-28.1%
9	BULK	30.9	23.6	123.4	94.3	-23.6%
10	TOTAL	32.2	24.5	128.8	98.0	-23.9%
11	DOMESTIC	28.0	18.6	111.9	74.5	-33.4%
12	EXPORT	4.2	5.9	16.9	23.5	38.6%
13	C.O.	10.1	15.6	40.4	62.4	54.5%
14	WEEKS	16.3	33.1	65.2	132.4	103.0%

(a) FCPA members.

(b) In addition to pack from fruit, includes domestic receipts by members of Non-Florida product; Florida product received by members from non-members; foreign imports; and chilled GJ used in FCGJ.

Source: FCPA.

Table 9. Total FCGJ-CGJ Availability, Movement, and Carry-Over.

		FCGJ		CGJ		TOTAL		
		1998-99	1999-00	1998-99	1999-00	1998-99	1999-00	
		Million SSE Gallons						% Change
1	AVAILABILITY							
2	BEG. INV.	70.4	40.4	12.9	11.4	83.3	51.8	-37.8%
3	PACK	97.8	114.4	39.4	51.8	137.1	166.2	21.2%
4	FCGJ TO RECON			15.5	6.3	(a)	(a)	
5	CGJ TO FCGJ	0.1	0.0			(b)	(b)	
6	OTHER NET SUPPLIES (c)	1.0	5.6	0.0	0.0	1.0	5.6	470.9%
7	TOT. AVAIL.	169.2	160.4	67.8	69.4	221.4	223.6	1.0%
8	MOVEMENT	128.8	98.0	56.4	48.3	169.6	140.0	-17.5%
	U.S. Exports (d)					24.3	31.5	29.6%
	Domestic					145.3	108.5	-25.3%
9	C.O.	40.4	62.4	11.4	21.2	51.8	83.6	61.4%

(a) Included in FCGJ pack.

(b) Included in NFC pack.

(c) Domestic receipts by members of Non-Florida product; Florida product received by members from non-members; and foreign imports.

(d) Assumes U.S. exports are from Florida.

Source: FCPA.