

Retail Communications Update

Presented to the Florida Citrus Commission
September 17, 2008



Targeted Retailers

- Wal-Mart
- Publix
- Stop & Shop
- Shaw's
- Hannaford Brothers
- Giant, Carlisle
- Giant, Landover
- Wegmans
- Tops
- Shop-rite
- A&P
- Pathmark
- Food Lion
- Kroger



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New Targeted Retailers

- Winn-Dixie
- Meijer
- Sweetbay
- HEB
- Harris Teeter
- Jewel
- Target
- Giant Eagle
- Safeway
- Supervalu (Albertson's)
- Bi-Lo
- Ingles Markets

26 Retailers
60%+ OJ ACV



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Florida Orange & Grapefruit Juice

Retailer X



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Executive Overview

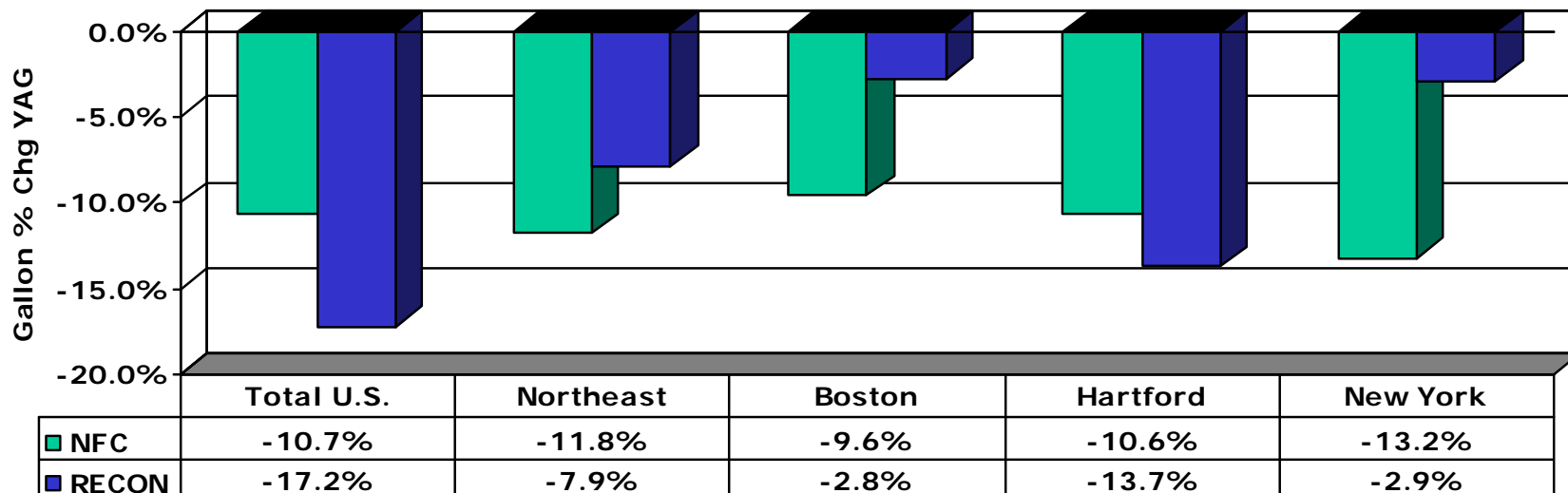
- Refrigerated Orange juice is highly responsive to promotional activity such as Feature & Display ... delivering high lifts. OJ does not respond well to price reduction only tactics.
- Retailer X is retaining OJ consumers better than its competition and is still converting OJ consumer well, but both measures are declining.
- When Retailer X's customers go to a competitor to buy groceries they tend to buy a disproportionately high amount of Orange Juice. When Retailer X loses an OJ sale to a competitor it also loses \$58.70 in total basket sales.
- Leverage feature and display promotional tactics to ensure Refrigerated OJ has its share of voice in Retailer X's beverage category. Additional opportunities to bring customers into Retailer X could generate **\$6 MM** in increased Ref OJ sales and over **\$90 MM** in total basket sales.



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Ref OJ Gallon Sales Trends



Although less Ref OJ is sold on promotion in the Boston market, Boston's volume trends are better than New York and Hartford. The average non-promo price of Ref OJ in Boston is 20-25% less than the other two markets.

Source: Nielsen Scanning Data - \$2mm Grocery – 52 weeks thru 2/16/08

		% Gallons Sold on Promo (not including TPR)
Total U.S.	NFC	34.1%
	Recon	23.9%
Northeast	NFC	44.5%
	Recon	26.1%
Boston	NFC	34.2%
	Recon	12.2%
Hartford	NFC	51.2%
	Recon	34.1%
New York	NFC	54.7%
	Recon	46.9%



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Retailer X Refrigerated OJ Purchase Dynamics

	RETAILER X			Account A			Account B		
	2007	2006	% Chg	2007	2006	% Chg	2007	2006	% Chg
Total Shoppers (000)	7,048.0	6,823.8	3.3%	5,281.3	5,292.4	-0.2%	3,596.6	3,656.6	-1.6%
Ref OJ Shoppers (000)	5,433.5	5,428.0	0.1%	4,156.9	4,331.2	-4.0%	2,599.3	2,797.9	-7.1%
Ref OJ Buyers (000)	3,020.5	3,059.2	-1.3%	2,877.6	3,050.0	-5.7%	1,236.0	1,374.7	-10.1%
Buyer Conversion	55.6%	56.4%	-1.4%	69.2%	70.4%	-1.7%	47.6%	49.1%	-3.2%
Total Retailer Trips (000)	166,647.3	160,341.4	3.9%	143,595.2	143,458.9	0.1%	68,574.5	72,043.6	-5.5%
Ref OJ Trips (000)	15,327.9	16,439.6	-6.8%	18,476.9	20,929.9	-11.7%	6,552.2	8,171.5	-7.3%
Shopping Conversion	9.2%	10.3%	-10.3%	12.9%	14.6%	-11.8%	9.6%	11.3%	-1.8%

- Retailer X has gained Total Shoppers and Ref OJ Shoppers and lost less Ref OJ Buyers than the competition.
- However, Retailer X's Ref OJ Shopping Conversion is down -10.3% while Ref OJ trips are down -6.8%. Lost item buyers and lost shopping conversions cost Retailer X sales and profit dollar.

* Shopping Conversion – When Ref OJ is purchased on a general shopping trip



Source: Nielsen Cross Outlet*Facts 2007

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Retailer X Ref OJ Opportunity



- If Retailer X can increase Shopping Conversion by 10% this would increase Retailer X Ref OJ sales by **\$6.4 MM**
- When Ref OJ is in the basket, customers spend \$58.70 in total basket purchases. If 10% of Ref OJ Trips are gained the resulting increase of total basket dollar sales is **\$90 MM**

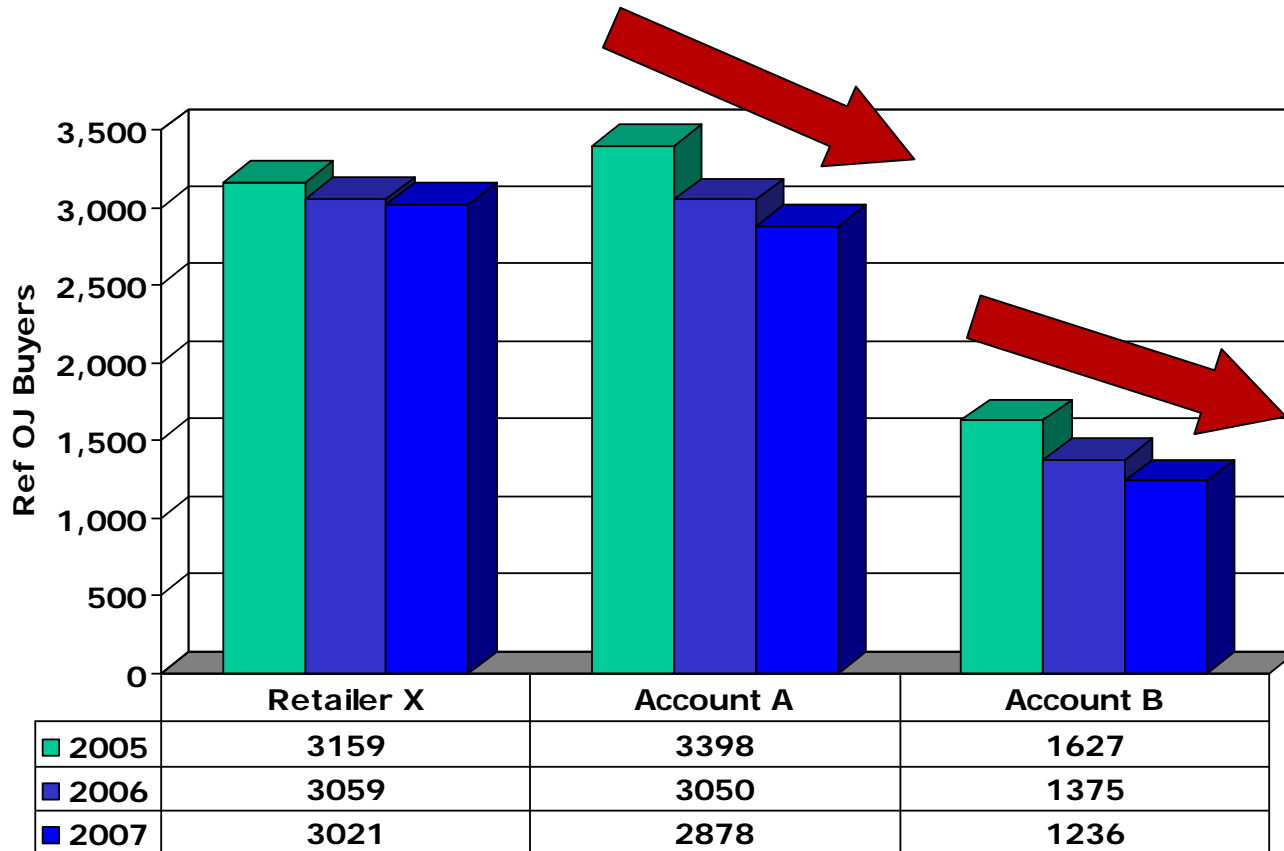
Source: Nielsen Cross Outlet*Facts 2007



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Trends in Ref OJ Buyers



**Accounts A&B are losing Ref OJ consumers faster than Retailer X.
Retain your shoppers and attract the competition's Ref OJ
customers by promoting more often.**

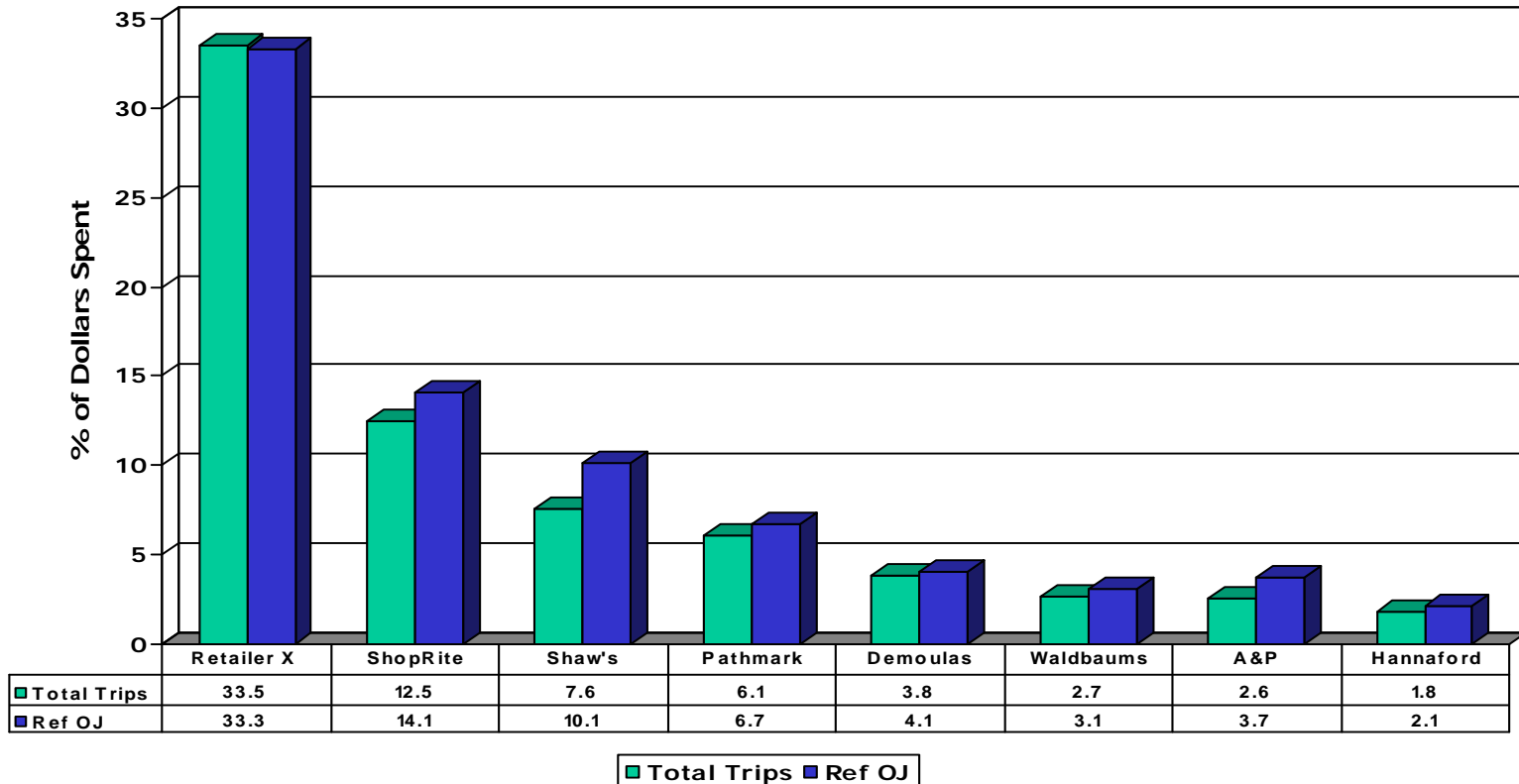


Source: Nielsen Cross
Outlet*Facts 2007

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Where do Retailer X Customers spend their Ref OJ and Grocery \$\$?



When Retailer X consumers go to ShopRite or Shaw's to shop, they spend a higher share of their Ref OJ dollars than Total Grocery dollars at the competition.

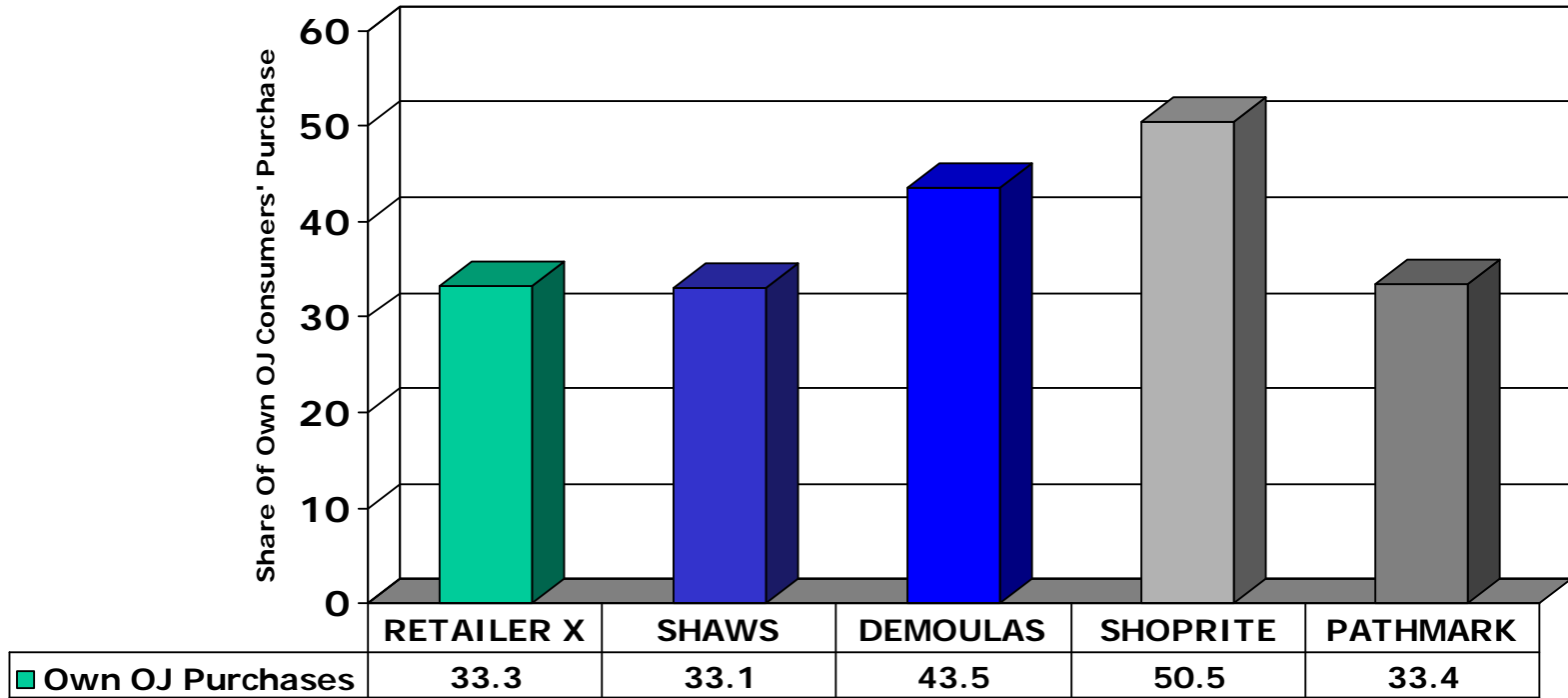


Source: Nielsen Cross Outlet*Facts 2007

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Keeping Your Shoppers' Ref OJ \$



Retailer X is one of the lowest, among its competitors, selling Ref OJ to its own shoppers. Retailer X shoppers are spending 33.3% of their Ref OJ \$ at Retailer X, while ShopRite keeps 50.5% of its shoppers' Ref OJ \$.



Source: Nielsen Cross
Outlet*Facts 2007

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Retailer X Ref OJ Opportunity



- If Retailer X could keep 50.5% of their shoppers' Ref OJ \$ at Retailer X, through additional promotional efforts, Ref OJ sales could increase by almost **\$33 MM**

Source: Nielsen Cross Outlet*Facts 2007



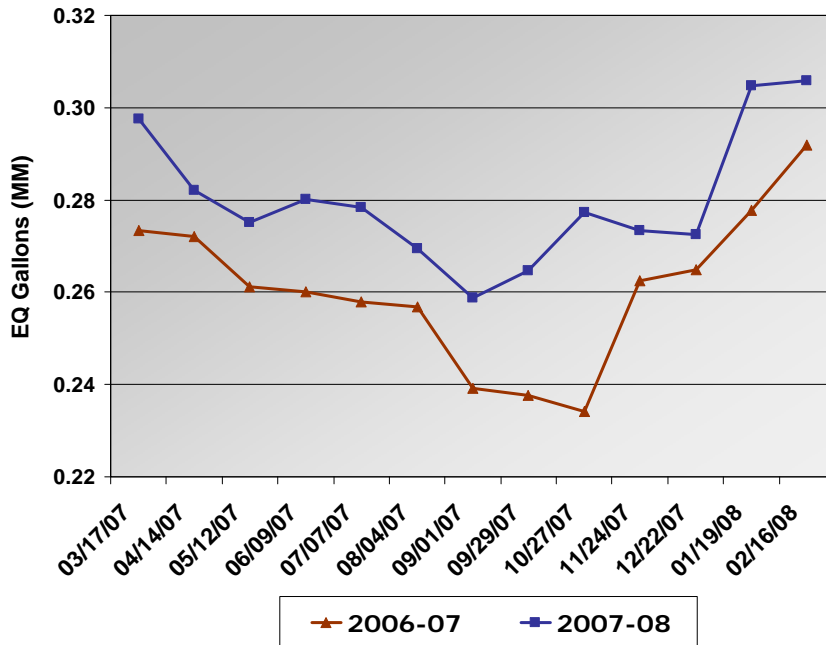
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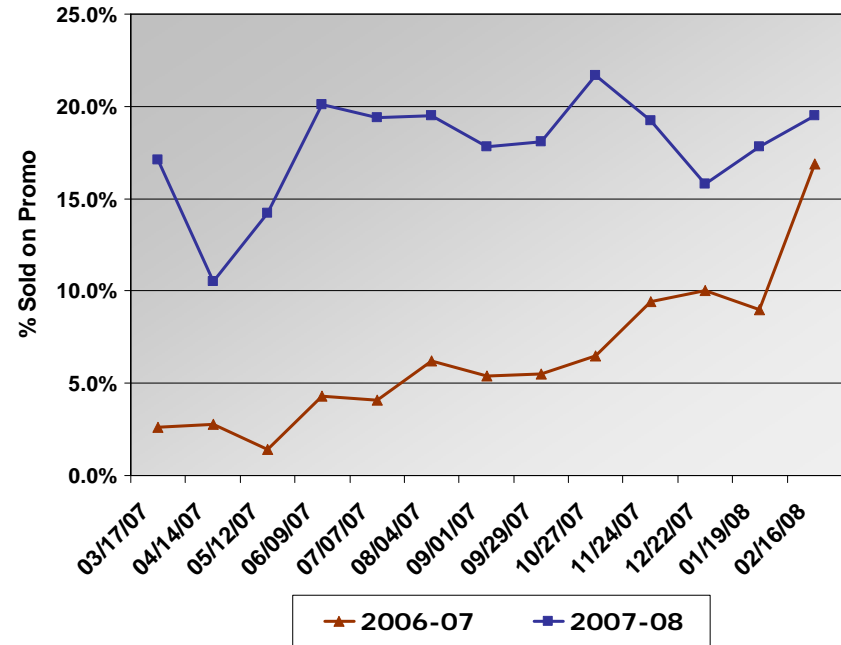
Grapefruit Juice – Northeast Region

GJ Gallon Sales at \$2mm Grocery in the Northeast are up +7.4% ... driven by an increase in promotional support at retail.

GJ Gallons



% GJ Sold on Promo



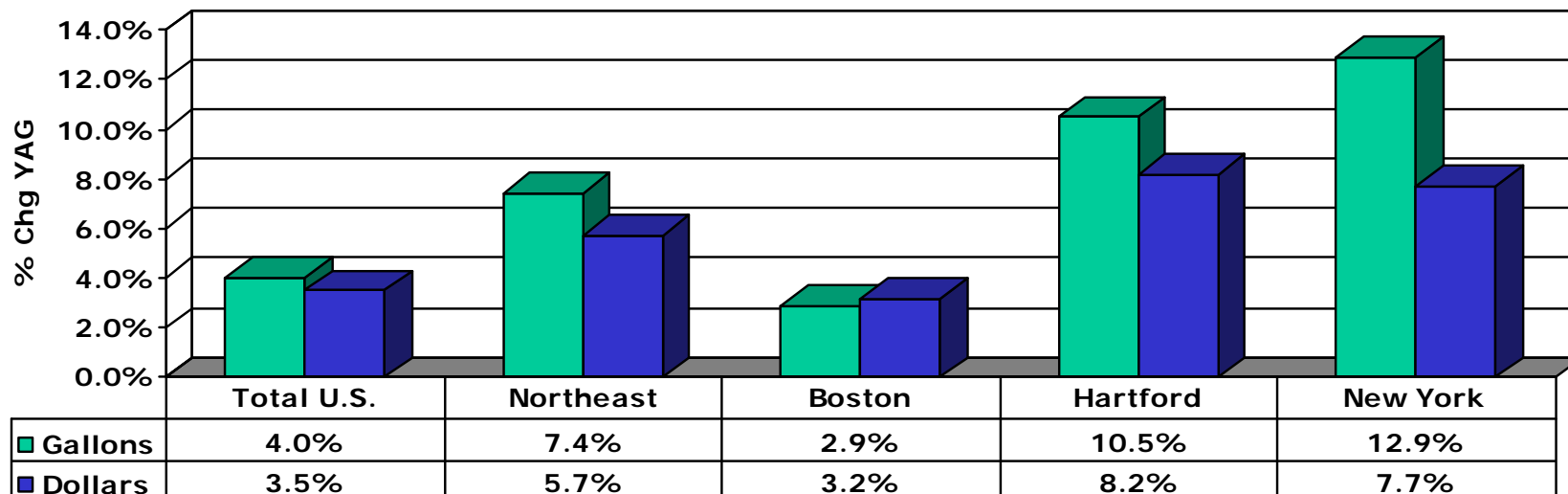
Source: Nielsen Scanning Data - \$2mm Grocery – 52 weeks thru 2/16/08



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Grapefruit Juice Market Trends



GJ Sales Trends are better in Hartford and New York than in Boston. Trends in both Hartford and New York are exceeding trends in Total U.S. and Northeast.

	% Gallons Sold on Promo (not including TPR)
Total U.S.	9.7%
Northeast	17.7%
Boston	16.3%
Hartford	22.3%
New York	22.2%



Source: Nielsen Scanning Data - \$2mm Grocery – 52 weeks thru 2/16/08

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OJ Brochures

Cold and flu

Heart health

Good nutrition

**100% PURE
ORANGE JUICE**
Healthy. Pure & Simple.



Cold & flu

Boost your body's natural defenses the natural way.

Nutrients such as vitamin C, folate, vitamin B6, and carotenoids are important to the body's immune system. Florida Orange Juice is a natural way to help give your body what it needs to fight sickness and disease, especially during cold and flu seasons.

Did you know? One 8-ounce glass of Florida Orange Juice provides 100% of the daily recommended amount of vitamin C.

Other benefits of Florida Orange Juice:

- One 8-ounce glass counts as almost 25% of your USDA recommended daily fruit and vegetable servings.
- As a good source of potassium, it may help maintain healthy blood pressure.
- More nutrients per calorie than other commonly consumed 100% natural fruit juices.
- More vitamin C per ounce than apple, grape, pineapple, or prune juices.
- 100% natural.
- The vitamins and phytonutrients in Florida Orange Juice may help support the body's natural ability to fight inflammation.
- Makes it easy to get important nutrition at home, work, or play.

floridajuice.com

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Buena nutrición

**100% PURO
JUGO DE NARANJA**
Saludable. Puro y simple.

Spanish



OJ Brochures

CHAIN	STORES	JUICE AISLE	PHARMACY
Publix	900+	Cold & Flu General Nutrition	Cold & Flu
Wal-Mart	2,300+	Cold & Flu Heart Health	
Stop & Shop	350+		Cold & Flu
Giant Foods	190+		Cold & Flu
Giant Food Stores	180+		Cold & Flu

FDOC Marketing Plan Orange & Grapefruit Juice

Retailer X



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Presentation of Contract: 08-10 LifeClinic International, Inc.

**Presented to the Florida Citrus Commission
September 17, 2008**



Contract: 08-10

LifeClinic International, Inc.

- **Vendor:** LifeClinic International, Inc.
- **Contract Number:** 08-10
- **Amount:** \$245,219
- **Funding Sources:** 57101711001 - 133476
- **Terms:** Nov. 3, 2008 – Jan. 25, 2009
- **Status:** Single Source; new contract
- **Purpose:** LifeClinic International, Inc., will place 100% orange juice messaging on blood pressure machines in five major U.S. retailers totaling 2,172 stores.



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