

Florida Department of Citrus International Marketing



Program Plans FY 2009-10

Industry Analysis Executive Summary

The Florida grapefruit industry is still recovering from devastating hurricanes earlier this decade. Though the storms themselves have passed, their lasting effects were depleted rootstocks and the spread of canker. Coupled with greening, the two diseases, if left unchecked, could threaten the industry's long-term viability. Needless to say, significant federal, state and industry resources have been allocated to research and combat these diseases. Though there is promise in the work now being done, this effort will take time. As a result, the FDOC projects diminishing grapefruit stocks over the next several years.

Unfortunately, Florida's grapefruit growers are facing challenges beyond those on the supply side. U.S. grapefruit consumption has steadily decreased over the last decade, and though consumption has now leveled off, the U.S. market alone is unable to support the industry. This has resulted in greater emphasis placed on sustaining export sales and ultimately on developing new export markets for Florida grapefruit. As it now stands, international markets account for a greater percent of sales than 10 to 15 years ago. Moreover, these products command a premium price in European and Asian markets, helping growers make up for lower domestic margins.

Because of the significance of export sales, there is interest to develop new export markets for Florida grapefruit and grapefruit juice. But in the immediate years, FDOC-driven development efforts in expansion markets are unrealistic. Supply limitations and demand from the FDOC's core target markets necessitates that attention remains focused in Japan, Europe, and Canada. Japan alone accounts for over 50% of all export shipments and sales to that market could be much higher. Exports to Japan in 2008/09 were down about 50% from their peak in 2003/04 in part because of limited supply. Exports to Europe and Canada were also traditionally higher than current levels.

The immediate focus in all of the FDOC's core markets is to maintain consumer demand for grapefruit and grapefruit juice while reinforcing the perception of Florida grapefruit as superior to all others. Accomplishing this will ensure that these markets are capable of absorbing future supply increases at prices that still deliver solid returns to growers. The FDOC has succeeded over the years by 1) highlighting the health and nutritional benefits of grapefruit and grapefruit juice consumption, 2) showcasing the added value benefits of Florida grapefruit and grapefruit juice and 3) demonstrating the versatility of these products in various food and beverage preparations. These strategies will be carried through to the 2009/10 program.

A number of tactics are employed in each market within these strategies. In most markets, in-store consumer sampling is central. This is, by far, the most efficient mechanism to generate consumer trial. Aside from direct consumer interaction through sampling, the media is typically enlisted to disseminate recipe suggestions, nutritional and product benefit messages, and information about Florida citrus availability. In

Japan, the scope of activity goes even further and includes promotions within the foodservice sector that lead to innovative uses for Florida grapefruit and grapefruit juice. Because these tactics helped Florida citrus exports reach new heights earlier this decade, large scale adjustments are unnecessary. Nevertheless, the FDOC still looks for new ways in which to reach its target consumers.

Much of this summary has focused on Florida grapefruit and grapefruit juice but orange juice is not overlooked. The situation for orange juice is the reverse of that for grapefruit and grapefruit juice. The vast majority of Florida orange juice is consumed domestically which lessens the need for promotional resources covering orange juice in most international markets. The primary exception is Canada, where FDOC orange juice promotions have helped preserve this important market.

Overall, the 2009/10 FDOC international marketing program will resemble campaigns in recent years. This is for good reason. The strategies and tactics employed by the FDOC over the years have achieved great success and record exports. Though limited production now inhibits further export growth, these same strategies and tactics will help preserve Florida's position as the top supplier of premium citrus, hopefully allowing export growth to resume as production levels recover.

The following sections provide a marketing plan by country. Included in the plans are a market assessment, target audience, objectives, strategies, tactics, and key measurements. The following countries will receive promotional support for the 2009/10 season.

Fresh Grapefruit & Grapefruit Juice

- Japan
- France
- United Kingdom
- Sweden
- Benelux (Belgium and Netherlands)
- Canada

Orange Juice

- Canada

Marketing Plan – FY 2009-10 Japan Grapefruit/Grapefruit Juice

Market Assessment:

- Japan is the world's largest market for imported consumer food products and the largest overseas market for U.S. food and agricultural exports.
- The total food market in Japan is valued at \$555 billion for a population of 127 million compared to the U.S. food market valued at \$1 trillion for a population of nearly 300 million. Japanese consumption focused on quality (not quantity).
- Japan is the world's second largest economy. It is also the most important and highest per capita consumption market for Florida grapefruit in the world.
- Japan's market for high-value foods and beverages continues to change dramatically, with the latest trend being a major thrust toward functional, healthy and nutritious foods.
- Japan has steadily grown less self-reliant for its food supply. Japan's self-sufficiency rate is 39% and has been declining due to an aging and declining farm population.
- Consumers in Japan are strongly influenced by American food culture via the Japanese media.
- Florida is the primary imported grapefruit representing about a 90% share of market during Florida's season. Primary competitor is Israeli Sweetie.
- Florida also competes with the Japanese Mikan (orange) for shelf space.
- Consumers have a high expectation for quality (internal and external), and are willing to pay a premium price for superior products.
- Grapefruit continues to be a popular flavor/scent appearing in many products.
- Grapefruit juice/drug interaction continues to be an issue.
- Consumer preference continues to shift from white to pink grapefruit; Japan is the industry's only notable white fresh market.
- Per capita consumption of fresh produce is declining among young consumers.
- Food safety issues and healthcare policy issues are a growing concern.
- **Strengths:** Health benefits, premium taste, brand awareness, strong trade relations, quality perceptions, infrastructure, acceptance of grapefruit
- **Weaknesses:** Escalating production costs, lack of convenience, lower taste profile in early season, peak season for domestic products, lack of excitement in the category, drug interaction
- **Opportunities:** Demand for high-quality healthy and functional foods, trends in foodservice, low consumption cities, growing Japanese emulation of U.S. cultural and food trends, acceptance of fresh-cut, partnerships with complementary products
- **Threats:** Aging population, Mikan orange, opportunistic competitors, increased food safety awareness, increasing demand for food quality certificates and production information, current worldwide economic crisis forced Japanese consumers to be more frugal in purchasing food products, strong Yen increases the cost of marketing programs

Target Audience:

Consumer - Middle to upper income health conscious women 25+

Retail Trade - Wholesalers, supermarkets, hypermarkets and convenience stores

Foodservice Trade - Foodservice chains and popular eating and drinking establishments

Objective:

- Evolve Florida grapefruit (fresh and juice) from a commodity to a value-added product in the Japanese market, and position the fruit as an indispensable item in the daily life of the target consumer.
- Establish Florida grapefruit as a perennial favorite in the typical Japanese diet.

Strategies:

The overall strategy is to maintain the trade's commitment to handling Florida grapefruit and grapefruit juice and strengthen top-of-mind consumer awareness of the products as supply remains tight and prices are high. Specific strategies include:

- Through advertising and promotion, create sense of urgency and excitement with consumers that Florida grapefruit is now "in-season".
- Partner with retailers to expand shelf space during peak selling season.
- Educate consumers about the wellness benefits of grapefruit.
- Differentiate Florida grapefruit and grapefruit juice from competing products through brand identification and by educating all sectors about Florida's unique value-added product attributes. Fresh - size, juice content, taste, quality assurance. Juice – freshness, natural sweetness, quality assurance.
- Develop new channels of distribution.
- Improve consumption in specific western and northern cities through promotions and consumer education.
- Emphasize the convenience of grapefruit juice and introduce new uses for grapefruit.
- Continue to strengthen Florida grapefruit and grapefruit juice positioning as trendy products that appeal to younger consumers while maintaining the core consumer base.
- Improve brand identification of Florida grapefruit and grapefruit juice at retail by highlighting the Florida logo.
- Expand the usage of fresh-squeezed juice in pubs, which benefits small size white grapefruit – a product that has few other markets.

Tactics:

- Advertising
FDOC's advertising campaigns in 2009-10 will continue emphasizing the theme, "The peak season of Florida Grapefruit is Spring." Advertisements will be placed in

magazines, newspapers, websites, mass transit, and on the radio. These ads will run nationwide with a particular focus on Tokyo, Osaka, and Nagoya. They will target women 25+. Initial target publications will include *Practical Living Magazine*, *Yomiuri Shimbun* (newspaper) and *Hokkaido Shimbun* (newspaper). Radio advertising slots will be purchased on four stations in the cities of Sapporo, Saitama, Nagoya, and Fukuoka. Transit ads will be placed in the Kanto, Kansai and Chukyo regions.

- **Retail Promotions**

To promote the Florida brand and communicate wellness and product attribute messages, the FDOC will conduct retail promotions with chains throughout the country. The following list contains the various promotions that will be organized to support the retailers' efforts.

- Retail In-store Promotional Events – The FDOC will retain demonstrators to conduct product sampling of Florida grapefruit and grapefruit juice to increase awareness of these products and influence purchase decisions. The product sampling will take place in-store and will also feature expanded shelf displays of Florida citrus products during the demonstration period. Demonstrators will also distribute leaflets and other educational materials about the wellness benefits and versatility of Florida grapefruit and grapefruit juice. The leaflets and educational materials will highlight the Florida sunburst logo. Because the vast majority of grapefruit and grapefruit juice sold in this market is through major retailers, this activity is key to the FDOC's efforts to maintain shelf space and grow consumer interest.
- Florida Grapefruit Caravan – The FDOC will set up as many as 50 special Florida grapefruit caravan demonstrations at large supercenter stores in Japan. The focus will be on Tohoku, Hokkaido, Kanto, Kansai, and Nagoya. The displays will include POS materials featuring the many benefits of Florida grapefruit, and will have demonstrators providing fruit and juice samples to consumers. Samples of both fresh-cut grapefruit and grapefruit juice will be available.
- Consumer Campaign – The Grapefruit Morning Campaign will target consumers to increase consumption of Florida grapefruit at breakfast. This will be done in coordination with the Florida grapefruit Ambassador. As part of the campaign, the FDOC will set up a consumer quiz to win grapefruit-related products or a trip to Florida. The quiz will focus on nutrition and health topics, and will be advertised online and through POS materials.
- Fruit Shop Promotion – Although large supermarkets represent the main distribution channel for Florida grapefruit in Japan, there are approximately 30,000 small fruit and vegetable shops in Japan that are frequented by Japanese housewives. FDOC will target the most premium stores within this segment, emphasizing the high quality and value of Florida grapefruit in special promotions. The highest quality grapefruit, Florida's "Caramel White" variety, will be featured as an exclusive treat with availability on a limited basis. Top end fruit is a good match for the Japanese market, as these items are often used as gifts. The FDOC will develop posters to display during the promotions and will provide advertising support for this campaign.

- Cross-promotional Advertising – The FDOC will continue efforts to cross-promote Florida grapefruit and grapefruit juice with the liquor and beverage sectors in select supermarkets nationwide. The cross-promotions have the effect of expanding shelf space devoted to Florida grapefruit and grapefruit juice, while promoting new uses and partners for Florida grapefruit. Targeted partners for the cross-merchandising will include Suntory and Jinro (liquor). The FDOC has also succeeded in the past in obtaining cross promotion agreements with salad dressing manufacturers for citrus based salads. These, and some dessert cross promotions will again be sought.
- POS Material
POS materials will be created to educate consumers about the superior quality, nutritional value, and functional attributes of Florida grapefruit and grapefruit juice. All POS materials will feature the Florida Sunburst logo, and will include posters, stickers, leaflets, video, squeezers, grapefruit straws, easy-peelers and spoons. Materials will be distributed for retail promotions and public relations activities.
- Merchandising
FDOC will retain merchandisers to phone and make personal visits to importers, wholesalers, retailers, and convenience stores nationwide. Merchandisers will visit targeted trade contacts to educate the trade about the benefit of handling Florida grapefruit and grapefruit juice, and arrange retail promotions. Merchandisers will distribute POS materials and other promotional items. Importantly, merchandisers will also inform the trade about the FDOC's branding efforts and will encourage the trade to take advantage of the opportunity by carrying and prominently displaying Florida products.
- Public Relations
The FDOC's public relations campaign is designed to educate consumers and influencers on how consuming Florida citrus products every day can help maintain a healthy lifestyle. The PR program will also reinforce the FDOC's branding strategy, ensuring that consumers identify the Florida logo and look for Florida grapefruit at retail. A part of this branding strategy will be to reinforce the seasonality of Florida grapefruit to ensure that consumers recognize that premium Florida grapefruit is generally available only from November – April/May. Promoting the seasonality of Florida fruit should help encourage greater early season sales. Components of the public relations activity will include:
 - Press Conference (Kick-off Meeting) – The FDOC will hold its annual trade meeting in Tokyo at the beginning of the Florida season to inform the trade and media about the status of the Florida grapefruit crop, shipment updates, and FDOC promotional plans. The FDOC will also invite trade and consumer media to a press conference preceding the meeting. A spokesperson will be invited to discuss the health and wellness messages of grapefruit and grapefruit juice consumption. By incorporating this media element to the meeting, the FDOC has been able to generate early season coverage for its programs and messages and has been able to reinforce trade confidence in handling early season Florida

grapefruit. To increase exposure in other regions, the FDOC will hold similar seminars/meetings in Sapporo, Nagoya, Kobe, and Fukuoka.

- Media Tie up Program – To increase awareness and consumption of Florida grapefruit and grapefruit juice, the FDOC will pitch stories focusing on the quality and wellness benefits of Florida grapefruit and grapefruit juice to targeted media, including national newspapers (family and lifestyle sections), women’s magazines, cooking and health magazines, and medical journals. The FDOC will also develop placements with prominent television programs such as King’s Brunch. These “tie-ups” will include the use of well known spokespeople such as models, TV personalities, and food journalists. The FDOC will individualize content for each media outlet that features the FDOC’s key health, wellness, and seasonality messages.
 - Grapefruit Ambassador – The FDOC will contract with a female celebrity to generate press coverage for Florida grapefruit and grapefruit juice in lifestyle, fitness, medical, women’s issues, and cooking publications. The celebrity will act as a Florida grapefruit spokesperson drawing attention to the many benefits of Florida grapefruit consumption.
 - Fruit Clinic Program – FDOC will attract media attention and reach out to consumers by conducting cooking schools and food education events, which will provide education on the health benefits of grapefruit consumption. The campaign will highlight grapefruit as the perfect food for breakfast, proper health, and maintaining a strong immune system. These efforts will be covered on Japan’s Fruit Clinic News website (www.fruitsclinic.jp).
 - Press Office – The FDOC will fund a press office that prepares media releases, handles media inquiries, collates and distributes materials, arranges interviews with visiting FDOC staff or industry, provides issues/crisis management contacts, etc. The public relations agency will also work in conjunction with Yamano & Associates (the FDOC’s marketing representatives) to assure maximum media cover at the annual trade meeting.
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- Web Site

The FDOC will maintain the Florida Citrus Fan Club web site (www.citrus-fc.com) in Japan. The site provides information to consumers and the trade regarding the wellness benefits and product attributes of Florida citrus. It also enables the FDOC to have direct interaction with, and receive feedback from, consumers. Changes will be made to the web site to ensure that it ties into the FDOC’s promotional and public relations campaigns and contains information on the latest FDOC activities taking place throughout the season.
 - New Business Development

The FDOC will work with product manufacturers or distributors in Japan to introduce new food, beverage, and cosmetic products containing Florida grapefruit or grapefruit juice. Products that have been explored with food/product manufacturers include peeled grapefruit, salads with grapefruit and grapefruit dressing, dessert menu items and other products for cafeterias.

- Foodservice Promotions

The FDOC intends to use foodservice promotions to maintain distribution through existing partners and to establish new partnerships that will help expand distribution for Florida citrus in this sector. The majority of these promotions will target Tokyo and Osaka, where Florida citrus still has significant growth potential through foodservice.

The FDOC will conduct promotions with up-scale coffee shops, pubs, salad bars, cafes, hotels, and quick-service establishments. The FDOC will provide POS materials, table tents, menu cards and incentives to foodservice establishments to offer new Florida grapefruit or grapefruit juice products. Specifically, the FDOC will work with pubs to develop new grapefruit-based cocktails, with coffee shops to offer Florida citrus juices or juice mixes, with salad bars to introduce fruit salads with fresh grapefruit or salad dressings, dessert items, etc. In addition, FDOC will team up with the gourmet professional website “Gyao,” a new type of Web TV that provides information on restaurants. This partnership will include the incorporation of a promotional film about Florida grapefruit on the site along with restaurant recommendations, menus, and directions to establishments that feature Florida grapefruit products in recipes and on the menu.

Measurements:

- ✓ Performance Measurement Study – annual tracking study that measures consumer purchase dynamics
- ✓ Country Progress Report – annual evaluation of program results, a requirement of Foreign Agricultural Services (USDA)
- ✓ Florida’s Fresh Citrus Shipment Report – tracks weekly movement of Florida grapefruit movement by country
- ✓ Florida Citrus Economic Indicators Report – reports US Department of Commerce monthly tracking of US grapefruit juice exports by global region
- ✓ Global Trade Atlas – electronic database that measures export volume and market share

Marketing Plan – FY 2009-10 France Grapefruit/Grapefruit Juice

Market Assessment:

- France is a leading economic player in the EU. With a \$2.5 trillion gross domestic product, France is the world's sixth largest industrialized economy. The French population of 63.7 million has a per capita income of \$39,215.
- The food industry in France is the largest industrial sector, far ahead of the automobile, electric and electronic sectors.
- French consumers are exacting when it comes to quality and innovation; food is their culture.
- France remains a significant export market for Florida grapefruit. (It is the largest European market for Florida fresh grapefruit - second in the world only to Japan.)
- France consumes nearly half of all Florida grapefruit shipped to Europe.
- Increasing fruit consumption remains French government policy, strongly pushed via the French Health Ministry campaign.
- Packaging of fruit in-store encouraging portability and ease of consumption on the rise.
- French women view "diet" to mean having a better, healthier attitude towards food rather than losing weight.
- Grapefruit and drug interaction is not perceived as a key issue in France among the media or medical community. Health officials are aware of potential interactions but not overly concerned, and no scientific research launched on the subject. General perception is that drug and food interaction is a possible and normal occurrence.
- With more and more French children classified as overweight, there is growing interest in information related to health and well-being among consumers and in the media. The overarching message is about finding and maintaining balance in diet and lifestyle.
- **Strengths:** Strong consumer perceptions regarding Florida quality, health benefits, premium taste, strong trade relations, well established channels of distribution
- **Weaknesses:** Lack of convenience, lack of understanding the value of a Florida grapefruit (heavier, juicier than competition), lack of direct representation, living with canker
- **Opportunities:** Relatively strong Euro allows growers to pass on higher production costs, establishment of a strong brand logo, American food and food products remain popular
- **Threats:** EU scrutiny of canker-free protocol, aggressive competition in the area, alternative fruit varieties compete for shelf space, grapefruit not considered a mainstream fruit, Intercitrus promotional campaign financed with the assistance of the European Community, relatively weak U.S. dollar results in high marketing costs

Target Audience:

Consumer - middle to upper income health conscious women 25+
Media – food & beverage, lifestyle, and health editors and writers
Trade - Importers, wholesalers, and retailers

Objective:

- Raise awareness and preference for Florida as producing the best quality grapefruit and juice, and associate products with a healthy lifestyle.
- Continue to win back lapsed consumers, expand consumption with occasional users.

Strategies:

The FDOC anticipates that increases in grapefruit and grapefruit juice exports to France can be achieved by implementing the following strategies:

- Differentiate Florida grapefruit and grapefruit juice from competing products on the basis of superior quality and value (Fresh - juiciness, size, superior taste, quality assurance; Juice - natural sweetness, superior taste, freshness, quality assurance). This strategy will reinforce Florida citrus as premium products worth the additional expense.
- Take advantage of France's wellness trend by educating consumers and influencers about the wellness benefits of grapefruit and that Florida grapefruit and grapefruit juice are key to maintaining a healthy lifestyle.
- Facilitate product identification by continuing to highlight the "Florida" logo and educating the trade and consumers regarding its meanings.
- Leverage increased retailer focus by offering consumers a more exciting in-store experience.

Tactics:

- Public Relations

The FDOC will conduct a comprehensive PR campaign to reinforce the image and awareness of Florida grapefruit and grapefruit juice through messages on wellness and product benefits. The campaign will focus on the superior taste of Florida grapefruit while positioning Florida grapefruit and grapefruit juice as trendy products that help maintain a healthy lifestyle. Activities included in the public relations program are as follows:

- In-store Promotions – The FDOC will conduct retail promotions to increase consumer awareness of Florida grapefruit products at retail. The promotions will include in-store tastings of Florida grapefruit and grapefruit juice, advertorials about the Florida grapefruit industry and the quality and benefits of Florida grapefruit, and the dissemination of leaflets containing nutritional information, recipes, and a summary of the products' benefits. A contest/quiz will also be featured through the in-store leaflets.

- POS Material – The FDOC will develop new materials for use during the in-store promotions and public relations activities and for delivery to the trade as part of the FDOC’s brand identification program. Materials will include leaflets, posters and shelf talkers. Materials will convey the product attribute and wellness messages.
- Advertorials – The FDOC will create a two-page advertorial, which will run in the monthly culinary magazine *Vie Pratique Gourmand* and the weekly woman’s magazine *Femme Actuelle*. *Vie Pratique Gourmand* has a monthly circulation of 182,662, and *Femme Actuelle* has a weekly circulation of 983,657. These publications provide the perfect medium to deliver FDOC advertorials on the health and wellness associated with Florida grapefruit and grapefruit juice. The advertorials will also focus on the distinguishing quality and taste of Florida grapefruit, and will demonstrate the benefits through a mix of editorials, photos, and recipes.
- www.750g.com Culinary Website Partnership – The 750g website is one of the 3 major websites with 4.3 million viewers a month and 34 million visited pages per month. The website is directed by two well-known chefs who give recipes and advise. The partnership will include banner ads, articles dedicated to Florida grapefruit, links to a specially created mini website, and 4 special issues of the 750g newsletter specially dedicated to Florida grapefruit. In addition, Chef Damien Duquesne will create 10 new recipes that will be used in press kits to promote Florida grapefruit.
- Media Relations – FDOC will continue to build relationships with key journalists and to educate the media on the benefits of Florida grapefruit and grapefruit juice. FDOC will generate press releases throughout the season to inform the trade media on the new crop and PR efforts, and to communicate to consumers regarding health and “detox” benefits of grapefruit.
 FDOC will also develop a Press Kit to help journalists become ambassadors for Florida grapefruit and grapefruit juice. The kit will provide the media with everything they need in order to write articles on the grapefruit industry and the benefits of grapefruit consumption. It will also include new recipes using juice and fruit, updated health claims, and photographs. The kit will be designed in the form of a “Carte Michelin” road map, showing the path from Florida to France – how grapefruit are grown and how they are shipped to France. The map will fold out into a poster and include comprehensive information on the health benefits, superior quality, and recipe innovation possible with Florida grapefruit and grapefruit juice.
 FDOC will partner with 750g at their annual “Culinary Blogs Fair”. The fair is an annual gathering of the most viewed and respected culinary bloggers from France, Belgium, and Switzerland. It represents a unique opportunity to communicate and promote Florida grapefruit among opinion leaders and purchasing advisors (i.e. the culinary blogs).
- Truth Squad – The truth squad will respond to negative and misleading articles about grapefruit interacting with certain medications. Accurate information on safe consumption of grapefruit and grapefruit juice will be offered.

Measurements:

- ✓ Performance Measurement Study – annual tracking study that measures consumer purchase dynamics
- ✓ Country Progress Report – annual evaluation of program results, a requirement of Foreign Agricultural Services (USDA)
- ✓ Florida's Fresh Citrus Shipment Report – tracks weekly movement of Florida grapefruit movement by country
- ✓ Florida Citrus Economic Indicators Report – reports US Department of Commerce monthly tracking of US grapefruit juice exports by global region
- ✓ Global Trade Atlas – electronic database that measures export volume and market share

Marketing Plan – FY 2009-10

United Kingdom Grapefruit/Grapefruit Juice

Market Assessment:

- The UK remains a trading power house and financial center and is the fourth largest economy in the world. The UK is one of a quintet of trillion dollar economies in Western Europe with rich consumers looking for high quality food products from around the world.
- The UK's economic growth is currently running at around 2.9% annually but is expect to slow given the current global economic crisis.
- The UK is a net importer of food, meeting only 60% of its food needs.
- Although the UK is the third largest market in Europe (behind France and Germany), it is recognized as a key market because of premium pricing and volume potential.
- Forty percent of meals are now eaten outside of home. Snacking and eating out are becoming increasingly common – and consumers are looking for convenient foods that are good for them.
- Health and wellness continue to be top of the political and media agenda in the UK. An extensive survey, conducted by the Health and Social Information Center, found that nearly one in four adults in England is obese. Among children 2-15, approximately 30% are obese or overweight.
- The Government is taking an active role to tackle the obesity crisis. Cooking lessons are to be compulsory in England's secondary schools for children 11 to 14.
- Grapefruit and drug interaction coverage continues to be an issue in the UK.
- The grey market is the UK's fastest growing sector of the population and control 80% of the wealth. These consumers are concerned with eating foods that provide the vitamins and overall benefits necessary to stay healthy.
- Consumer recognition for the Florida name is quite strong and consumers rank Florida product high in terms of product quality.
- **Strengths:** Health benefits, premium taste and premium perception, well known by the produce industry, well established infrastructure and distribution network
- **Weaknesses:** Lack of convenience, external appearance of Florida grapefruit, lack of direct representation, lack of understanding the value of Florida grapefruit
- **Opportunities:** Establishment of a strong brand logo, development potential outside of the greater London area, disposable income allows for higher per capita consumption of the category, increased purchasing power of the British Pound allows growers to pass on higher production costs
- **Threats:** Aggressive foreign competition, alternative fruit varieties compete for shelf space, grapefruit not considered mainstream fruit, Intercitrus promotional campaign financed with the assistance of the European Community, weak U.S. dollar increases the cost of marketing programs

Target Audience:

Middle to upper income health-conscious women 25+

Objective:

- Raise awareness and preference for Florida as producing the best quality grapefruit and juice, and associate products with a healthy lifestyle.
- Continue to win back lapsed consumers, expand consumption with occasional users.

Strategies:

Implementing the following strategies will help the Florida citrus industry expand grapefruit and grapefruit juice exports to the UK:

- Differentiate Florida grapefruit and grapefruit juice from competing products on the basis of premium quality and value (Fresh – superior taste, juiciness, size, quality assurance; Juice – natural sweetness, freshness, quality assurance). This strategy will reinforce Florida citrus as a premium product worth the additional expense.
- Educate consumers and influencers that Florida grapefruit and grapefruit juice consumption helps maintain a healthy lifestyle.
- Take advantage of the UK's wellness trend by educating consumers about the wellness benefits of grapefruit. Continue to position Florida grapefruit and grapefruit juice as trendy products that should be a part of an active, healthy life.
- Facilitate product identification by labeling all Florida citrus with a common "Florida" logo and educating the trade and consumers regarding its meanings.

Tactics:

- **Public Relations**
The FDOC will conduct a retail and public relations campaign during the 2009-10 marketing year to deliver messages pertaining to the wellness and product benefits of Florida grapefruit and grapefruit juice. Activities included in the public relations program are as follows:
 - Season Launch – In an effort to garner media and consumer attention for the start of the Florida grapefruit season, FDOC will turn a busy London square into a Florida style beach for one day. Turning a city into a beach will represent the mood-boosting benefits granted by the vitamin C found in grapefruit – thus mimicking the uplifting effect of eating Florida grapefruit when the weather is gloomy. Media will be invited to cover and attend the event, which will also be promoted through social networking tools such as Twitter and Facebook. Promotional staff will hand out marketing materials highlighting the mood-lifting and health benefits associated with eating grapefruit.
 - Media Outreach: Healthy Eating & Weight Loss – FDOC will work to generate new and positive media coverage about grapefruit, particularly as it relates to weight management and healthy eating. A new media kit will be produced that positions Florida grapefruit as a healthy way to manage weight. This media collateral will be distributed to key press contacts throughout the season. Additionally, an omnibus survey will be conducted to determine the success rates of popular "quick-fix" diets. Using the survey results, FDOC will hire a celebrity

nutritionist to develop a healthy eating plan incorporating Florida grapefruit, which will be distributed to media along with successful case studies of consumers who have gone on the “Florida grapefruit diet.”

- Girl Guide Campaign – FDOC will launch a campaign with the Girl Guides (analogous to U.S. Girl Scouts) highlighting the health benefits of eating Florida grapefruit. Over 125,000 Girl Guides will be reached throughout the UK. Each girl will be encouraged to spread their knowledge of cooking and healthy eating with fresh ingredients such as Florida grapefruit. To help motivate the girls to put this into practice, a competition will be set up challenging each Girl Guide group to create their own campaign to communicate the FDOC’s message to their community. The girls will be judged on their outreach success and the creativity of their campaigns. Local media will be contacted to follow the Girl Guide outreach, which will generate further promotion of Florida grapefruit.
- Consumer Sampling – The FDOC will conduct consumer sampling in the key retail outlets that carry Florida grapefruit and grapefruit juice: ASDA, Marks & Spencer, Morrison’s, Sainsbury’s, Tesco and Waitrose. The sampling activities will highlight the health benefits associated with grapefruit consumption and the product attributes of Florida grapefruit and grapefruit juice. Branded displays will be created and sampling personnel will be retained to staff the stations. Promotional activities such as online ads, grocery cart signage, competitions, recipe cards, floor graphics, leaflets, and in-store radio will also be conducted on a selected basis.
- Advertorials – Advertorials are an excellent vehicle to deliver key health and product attribute messages to target audiences. The FDOC will purchase advertorials in publications to coincide with the FDOC’s consumer sampling activities. The publication targets will be specialty food magazines, websites geared towards mothers, and lifestyle magazines. Specific examples include: *Delicious* magazine (circulation of 105,560), www.mumsnet.com (40,000 unique visitors per month), and *Loveit!* magazine (circulation of 227,156).
- Truth Squad – The truth squad will respond to negative and misleading articles in the healthcare and news/consumer press about grapefruit interacting with certain medications. Accurate information on safe consumption of grapefruit and grapefruit juice will be offered. Additionally, FDOC will continue distributing educational materials to UK pharmacists, which will aid in patient conversations regarding grapefruit-drug interactions. A new UK-specific educational packet will also be developed, rather than relying on the U.S. materials from past years.
- Press office – The FDOC will create press releases to generate media coverage for grapefruit and grapefruit juice with key trade and consumer media. The releases will outline FDOC product quality and wellness messages. The press office will also set up meetings between media/trade journalists and visiting FDOC staff, as well as monitor key issues and news related to Florida citrus products. The press office will draft weekly reports on market developments and activity updates for the FDOC. The office will also create grapefruit and grapefruit juice recipes that can be used in all reports sent to media and the trade, and to be used in advertorials and editorials.

Measurements:

- ✓ Performance Measurement Study – annual tracking study that measures consumer purchase dynamics
- ✓ Country Progress Report – annual evaluation of program results, a requirement of Foreign Agricultural Services (USDA)
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Marketing Plan – FY 2009-10

Sweden Grapefruit/Grapefruit Juice

Market Assessment:

- The Swedish economy has been growing rapidly in the past few years, but in 2008 the growth has fallen off with weaker tendency in exports, consumption, and investments. Although the demand for high-value, consumer-ready products has remained strong recently, the outlook for private consumption has become more negative and there are signs that the consumers are becoming more cautious.
- GDP grew 2.6% in 2007 and is expected to slow down in 2009. The Swedish government has adjusted the growth forecast to 1.3%, and expects growth to pick up again in 2010.
- Sweden, with a population of 9.1 million people, is a country with very high living standards. Swedish consumers are gravitating towards fresher, more convenient and more nutritious foods. High demands are made on food quality, origin, and environmental concerns
- Ongoing socio-demographic changes with busier lifestyles and increasing single-person households are affecting food retailing to a high degree. Retailers are shifting their product ranges towards an increasing share of healthier, ready-to-eat foods and home meal replacements.
- Eating out is growing faster than traditional retail sales.
- Organic and functional foods are gaining in popularity with significant consumer awareness in the area of food safety and healthy eating habits. This includes not only products with low fat benefits, but also those with nutritional advantages such as added fiber, vitamins and minerals, or ingredients with perceived disease-preventative qualities.
- There has been a recent proliferation of “greener” foods in Sweden.
- Fitness is a hot topic in Sweden and this trend is increasing all the time.
- The largest group of grapefruit consumers is adults that eat them naturally with a spoon for breakfast, mostly during the weekends.
- In Sweden, grapefruit is imported from Florida, Israel and Cyprus during the winter. In the summer, grapefruit come from Swaziland, Uruguay, and Argentina. There is no peak consumption period for grapefruit, it remains popular throughout the year.
- **Strengths:** Strong consumer perceptions regarding Florida quality, health benefits, premium taste, key exporters have well-established trade relations
- **Weaknesses:** Lack of convenience, lack of understanding the value of a Florida grapefruit (heavier, juicier than competition), lack of direct representation, external quality issues, a distant market with high distribution and shipping costs
- **Opportunities:** High standard of living, well-educated workforce, growing incomes, U.S. products are considered high quality and trendy
- **Threats:** Grapefruit not considered a mainstream fruit and not top-of-mind with consumers, attractive market for the competitive set

Target Audience:

Middle to upper income health conscious women 25+

Objective:

- Build the Florida Brand and position Florida grapefruit and grapefruit juice as being the highest quality, the sweetest, and best tasting in the world.
- Increase the Swedes' awareness and interest in grapefruit and grapefruit juice overall, and specifically, increase consumption and share of Florida grapefruit products.

Strategies:

The Florida citrus industry will look to improve the Swedish market position for Florida grapefruit and grapefruit juice consumption by:

- Focus activities on retailers that carry Florida products.
- Highlighting the numerous health benefits of grapefruit and grapefruit juice with particular emphasis on the dietary benefits and the natural energy boost these products provide.
- Reinforcing consumer perceptions of the superior quality of Florida grapefruit and grapefruit juice while educating consumers about the versatility of these products.

Tactics:

- **Public Relations**
The FDOC will conduct a comprehensive public relations program in Sweden consisting of the following activities:
 - **In-store Promotions** - The FDOC will conduct promotions with retail chains in Sweden, including Axfood/Hemkop, ICA, and VI stores. The promotions will include consumer samplings, Florida-branded leaflets containing information on Florida grapefruit, and competitions for the produce sales department. The promotions will be used to convey the FDOC's key messages, which include the quality of Florida grapefruit and grapefruit juice, the fruit's versatility, and the nutritional benefits associated with grapefruit consumption. The promotions will also highlight ways to incorporate grapefruit in every meal of the day.
 - **Release Event** – In cooperation with Swedish grapefruit distributors, the FDOC will invite key media personnel, trade members, and U.S. Embassy staff to an event celebrating the arrival of Florida grapefruit season. Each guest will be given a grapefruit and grapefruit spoon, as well as FDOC marketing materials and press information. Food and drinks using new grapefruit recipes will be served.
 - **Advertorials** - Advertorials will be carried out in conjunction with retail promotions to generate interest in the sampling activity and promote the quality, versatility, and health benefits of Florida grapefruit and grapefruit juice.
 - **The Good Kitchen fair** - FDOC will exhibit with a booth from November 6-8 at The Good Kitchen Fair (*Det Goda Koket*), the largest food and beverage trade

show in the Nordic countries. The FDOC will provide grapefruit and grapefruit juice samples and will distribute press and promotional literature at the booth and in the press room of the fair.

- Web Site - The FDOC will maintain its Swedish language website targeting the trade, media, and consumers. The site will contain grapefruit data, articles, recipes, photographs and other information/resources that convey the FDOC's health and quality messages. Links will also be incorporated to the FDOC website and cooperating Swedish distributors/retail partners so that visitors can learn of Florida grapefruit availability and promotions. The website will be promoted through all PR activities conducted by FDOC in Sweden.
- Press Office - The FDOC will also maintain a press office that prepares media releases, handles media inquiries, collates and distributes materials, arranges interviews with visiting FDOC staff or industry, provides issues/crisis management contacts, etc.

Measurements:

- ✓ Performance Measurement Study – annual tracking study that measures consumer purchase dynamics
- ✓ Country Progress Report – annual evaluation of program results, a requirement of Foreign Agricultural Services (USDA)
- ✓ Florida's Fresh Citrus Shipment Report – tracks weekly movement of Florida grapefruit movement by country
- ✓ Florida Citrus Economic Indicators Report – reports US Department of Commerce monthly tracking of US grapefruit juice exports by global region
- ✓ Global Trade Atlas – electronic database that measures export volume and market share

Marketing Plan – FY 2009-10 Benelux Grapefruit/Grapefruit Juice

Market Assessment:

- Economic growth in 2009 for the region is expected to slow to around 1.0%, down from 2.5% in 2008.
- The recent financial crisis is having an impact on European consumers. Their confidence in the economy has gone down dramatically and people are worried about their savings, jobs and pensions. As a result they are adjusting their lifestyle. Sales of luxury food products and beverages are expected to go down.
- Like many countries in the developed world, the Benelux area is seeing an increased occurrence of obesity in their population. With greater media and political emphasis on the negative ramifications of poor eating habits and obesity, consumers are growing more health and weight conscious. As a result, consumption of fruit, vegetables, and fruit juices is steadily increasing.
- The obesity issue is also a hot topic among the media. Coverage includes TV reality shows on weight loss, and a number of magazines and websites focused on healthy lifestyles.
- The Benelux region ranks among the highest in Europe of women working outside of the home. Convenience and time-saving products are important.
- The Benelux population is graying. Last year, the age group of 55+ accounted for 26.4% of the population while 10 years ago this number was only 22.8%
- Because of a number of food safety scares during recent years, this issue has become more important to consumers. These crises prompted the government and many other organizations to focus on consumer demands for safe and traceable products.
- Few grapefruit/drug interaction articles/stories have appeared in the region. The topic is not perceived to be a significant issue at this time.
- Key competition for fresh grapefruit includes Israel and Turkey during the season, and South Africa and Argentina during the summer. Most competitive grapefruit juice comes from Cuba and Israel.
- **Strengths:** Strong consumer perceptions regarding Florida quality, health benefits, premium taste, key exporters have well-established trade relations
- **Weaknesses:** Lack of convenience, lack of understanding the value of a Florida grapefruit (heavier, juicier than competition), lack of direct representation, canker situation could affect supply situation in Europe
- **Opportunities:** High standard of living, well-educated workforce, growing incomes, U.S. products are considered high quality and trendy, elevated interest in diet/weight reducing foods, region contains major seaports for receiving imported Florida grapefruit, increased purchasing power of the Euro allows growers to pass on higher production costs
- **Threats:** Grapefruit not considered a mainstream fruit and not top-of-mind with consumers, attractive market for the competitive set, relatively weak U.S. dollar results in high marketing costs

Target Audience:

Middle to upper income health-conscious women 25+

Objective:

Increase the Belgian and Dutch consumers' awareness and interest in grapefruit and grapefruit juice over all, and specifically, make Florida the top choice among both consumers and retailers.

Strategies:

The Florida citrus industry's long-term strategy for increasing awareness and demand for Florida grapefruit and grapefruit juice in the Benelux region is as follows:

- Highlighting the numerous health benefits of grapefruit and grapefruit juice with particular emphasis on the dietary benefits and the natural energy boost these products provide.
- Reinforcing consumer perceptions of the superior quality of Florida grapefruit and grapefruit juice while educating consumers about the versatility of these products.

Tactics:

- **Public Relations**
The FDOC will conduct a retail and public relations program in this region consisting of the following activities:
 - **Consumer/Retail Outreach** – FDOC will collaborate with Delhaize, a Belgium retailer that produces its own branded Florida grapefruit juice, to place an advertorial in its client magazine, *De Leeuw Le Lion*. FDOC will also exhibit with a booth at the Health & Wellness Expo or the Belgium Food Fare, two top consumer food shows, which would allow FDOC to provide over 10,000 grapefruit samples.
 - **HORECAVA** – FDOC will exhibit with a booth at the HORECAVA expo, a Dutch trade show targeting the catering industry. This show attracts approximately 50,000 visitors. The FDOC booth will include Florida grapefruit and grapefruit juice samples and educational handouts will be provided to attendees.
 - **“Detox” Media Outreach** – As the shipping season begins, FDOC will present a Florida grapefruit detox theme to various Belgian media outlets to promote consumption of grapefruit. The effort will begin by launching a detox road show that will visit key publishing houses of lifestyle/female magazines, highlighting the role that grapefruit can play in purifying the body, aiding in weight loss, and strengthening immune systems. The FDOC detox team, which will include a nutritionist, will meet with top editors and culinary journalists to educate them on these grapefruit attributes in order to garner publicity for Florida grapefruit within their publications. Additionally, FDOC will organize at least two detox seminars for trainers that influence the membership of organizations such as Weight Watchers and *Vrouwen die bewegen* (women who move). Lastly, the FDOC

detox effort will include virtual online health coaches on health oriented websites and the Belgian FDOC site. These online resources will provide users with the health and dietary benefits of Florida grapefruit and grapefruit juice.

- Taste Academy – In an effort to receive increased press coverage, FDOC will invite culinary journalists of leading female/lifestyle magazines to attend a cooking course, or “Taste Academy,” led by an expert chef. The course will focus on combining unique tastes together to form surprising results – introducing grapefruit as an ingredient in many of the featured recipes. In collaboration with the Taste Academy, FDOC will develop a taste profile segment on its Belgian website, which prompts users to answer questions regarding their taste preferences. This virtual interaction will provide online visitors with recipe suggestions using Florida grapefruit to suit their taste.
- Website & Newsflash – The FDOC will maintain the www.coolfloridagrapefruit.be web site in Belgium and will develop a quarterly news flash that will be automatically sent to registered trade contacts and journalists. All press releases will also be added to the site and the site will include links and the latest information on the Florida citrus industry, grapefruit, and grapefruit juice.
- Press Office – To assist with advertising and public relations efforts, the FDOC will maintain separate press offices in the Netherlands and Belgium. The office will send out press releases to key target media in culinary, health, and beauty. Magazines such as Sante, Body & Mind, Marie Claire, Elle, and Evita, among others will be targeted with information about Florida grapefruit and grapefruit juice and their benefits.

To announce the arrival of Florida grapefruit at the beginning of the season, FDOC will send out a press release with a high quality, professional picture featuring a Florida grapefruit. There will only be a short paragraph regarding the launch of the season. The idea is to gain attention and media coverage by featuring a unique and stylish photo in place of a traditional written press release. After years of establishing extensive media and press relationships through various promotion events in the Netherlands, FDOC needs to revamp the Press Kit that it supplies to these contacts. The new kit will be entirely digital so that the materials (recipes, photography, and educational collateral) can be easily accessed and downloaded for use in different publications.

The press office will also monitor inaccurate media coverage of the interaction between grapefruit and some medications and will respond to journalists’ questions on this issue. The press office will also send out correct information on this topic through “truth squad” letters and will put journalists in touch with the FDOC, if requested.

- Valentine’s Grapefruit – FDOC will work with a chef to develop Valentine’s Day recipes that utilize grapefruit as an ingredient. In light of the economic recession, the FDOC anticipates that consumers will dine in during many holidays in which previously they would have eaten out. Valentine’s Day is one example. Recipes created for this occasion will be coined “Pink Recipes” and will be distributed to lifestyle journalists in a press release.

- Health Angels TV – FDOC will work with the popular Dutch health and lifestyles television program, “Health Angels,” to have Florida grapefruit featured on one of their episodes, which reaches approximately 2.5 million viewers. Along with the TV exposure, Florida grapefruit recipes would also be featured on the Health Angels’ website and the largest Dutch recipe website, www.smulweb.nl. The television feature would be followed up with a one-page advertorial that would be published in the Health Angels magazine, which is distributed as an insert in key lifestyle publications in the Netherlands.

Measurements:

- ✓ Performance Measurement Study – annual tracking study that measures consumer purchase dynamics
- ✓ Country Progress Report – annual evaluation of program results, a requirement of Foreign Agricultural Services (USDA)
- ✓ Florida’s Fresh Citrus Shipment Report – tracks weekly movement of Florida grapefruit movement by country
- ✓ Florida Citrus Economic Indicators Report – reports US Department of Commerce monthly tracking of US grapefruit juice exports by global region
- ✓ Global Trade Atlas – electronic database that measures export volume and market share

Marketing Plan – FY 2009-10

Canada Grapefruit/Grapefruit Juice

Market Assessment:

- Canada is the No. 1 market for U.S. agricultural exports. U.S. agricultural exports to Canada account for 15-20% of the total U.S. food and agricultural exports. More importantly, American products account for more than 75% of total Canadian agricultural imports.
- Trade with Canada is facilitated by proximity, common culture, language, similar lifestyle pursuits, and the ease of travel.
- Although Canada consumes some Mediterranean fruit in the winter and Southern Hemisphere (primarily South Africa and Argentina) fruit in the summer, Florida continues to be the major supplier of fresh grapefruit to Canada. Primary competitors are Texas and California. Texas is considered a quality supplier equal to Florida.
- Toronto and Montreal are highly developed markets for Florida grapefruit. Western Canada is an area of strong opportunity for Florida grapefruit.
- Canadians claim to be health conscious and concerned about what they eat. However, many have limited knowledge of the protective effects of eating a diet high in fruits and vegetables. This is due in part to the strict controls the Canadian government has on advertising and product benefit claims.
- Canadian baby boomers continue to influence the market as they approach retirement. According to the Government of Canada, by 2011 close to 15% of the Canadian population will be over the age of 65. This segment of the population is weight conscious and focused on nutrition and keeping fit.
- The increase in demand for ethnic diversity in food is also having an impact on grocery shelves. What was once considered ethnic cuisine is now mainstream.
- Grapefruit and drug interaction continues to be an issue in Canada.
- The Canadian Dollar has weakened considerably against the U.S. Dollar over the last three months of 2008.
- Historically, the market has demanded small sizes at relatively low prices.
- **Strengths:** Health benefits, premium taste and premium perception, Florida's proximity to foreign market, well established infrastructure and channels of distribution, well known by the Canadian trade – some buying offices located in Florida
- **Weaknesses:** Lack of convenience, external appearance of Florida grapefruit, low awareness of Florida product attributes
- **Opportunities:** Populace favorably disposed to consumption of fresh fruits and vegetables, market access and ease of entry, high U.S. quality and safety perceptions, the name "Florida" is strongly perceived among Canadians, increase purchasing power of the U.S. dollar allows for an increase in marketing support
- **Threats:** Graying population, strong U.S. Dollar makes it more difficult for growers to pass on higher production costs, Canadian still want value and will price shop

Target Audience:

- Active women 25+ looking for a tasty and healthy option for their diet.
- Food retailers in primary and secondary markets in Central and Eastern Canada and the Quebec market.

Objective:

- Increase awareness, trial and preference for Florida grapefruit and grapefruit juice to drive sales in the Canadian market.
- Position Florida grapefruit and grapefruit juice in the changing fruit market as a reliable, timeless, exciting and viable option for the modern consumer.

Strategies:

The FDOC anticipates that increases in grapefruit and grapefruit juice exports to Canada can be achieved by implementing the following strategies:

- Differentiate Florida grapefruit and grapefruit juice from competing products in terms of taste, quality and value.
- Educate consumers and influencers about how consuming Florida grapefruit and grapefruit juice every day can help maintain a healthy lifestyle. Specific focus to be placed on the wellness benefits of grapefruit and grapefruit juice.
- Position Florida grapefruit and grapefruit juice in the changing fruit market as an exciting and viable option for the modern consumer.
- Continue brand identification for all Florida grapefruit to ensure that consumers can identify Florida grapefruit/juice at retail.

Tactics:

- **Public Relations**
The FDOC has an in-depth PR campaign planned for the 2009-10 marketing year. The campaign will promote Florida grapefruit and grapefruit juice as high quality, versatile, and delicious, while highlighting their superior product attributes and wellness benefits. Activities included in the public relations program are as follows:
 - Retail Sampling Program – FDOC will execute a sampling program with major retailers throughout Central and Eastern Canada highlighting the taste and health benefits of grapefruit. Develop a promotional program with retailers that would include providing grapefruit juice alongside fresh grapefruit samples, digital displays at select stores, and the distribution of recipe cards or other branded information. This program will also emphasize that Florida grapefruit are the premium grapefruit available and that it travels the shortest distance out to get to Canada of all competing grapefruit. FDOC will also participate in the “SUSTA Taste US” retail promotion conducted by Sobey’s stores throughout Eastern Canada. FDOC promotional messages will be conveyed in all print material.

- State of Citrus Report – Prior to the shipping season, FDOC will prepare a State of Citrus report in both English and French that will be delivered to key trade and media contacts in Ontario, Quebec, and Eastern Canada. This report will also contain educational tools to help retailers increase sales of grapefruit in their stores. The report will be posted on the FDOC Canadian website after it is distributed.
- Media Monitoring – The FDOC’s Canadian PR company will provide media monitoring services for “grapefruit-drug interaction” and other news coverage featuring grapefruit or grapefruit juice. This will cover Canadian newspaper, trade, and broadcast media. The media monitoring activity will also consist of the FDOC’s “Truth Squad” effort. The FDOC will monitor and immediately counter stories that offer negative and inaccurate information about grapefruit and drug interaction. This effort has been effective in recent years in preventing misinformation from gaining greater traction in the market.
- Canadian Web Site – The FDOC will maintain a Canadian-specific website that compliments and supports the FDOC’s main site, providing a portal of information on grapefruit and grapefruit juice to Canadian consumers. The website will also include new content designed to create more interaction among visitors, such as adding a blog, leveraging social media tools, and allowing users to submit their own recipes in a contest. FDOC will also continue its presence on www.UrbanMoms.ca, a popular online forum geared toward Canadian moms. FDOC will provide [UrbanMoms.ca](http://www.UrbanMoms.ca) with grapefruit recipes, and include a forum for discussion and recipe feedback. The site will also include blogs about different grapefruit and grapefruit juice recipes.
- Promotional Alliances – FDOC will work to create synergies with health-based organizations to profile Florida grapefruit and grapefruit juice. One possible example of a FDOC alliance partner is the Heart and Stroke Foundation. FDOC will use alliances like this to promote its key messages on quality, health, and functional benefits associated with grapefruit/grapefruit juice consumption. This will be accomplished through recipe contests and cooperation within the partners’ websites.
- Consumer Show – FDOC will partner with VISIT FLORIDA, the state’s tourism promotion agency, to exhibit with a booth at the Zoomer’s consumer show in Toronto. Zoomer’s is the first consumer show dedicated exclusively to adults over 45 years old. FDOC will utilize its presence to promote the healthy benefits of Florida grapefruit and to deconstruct the myths surrounding grapefruit/drug interactions. FDOC will create educational and promotional materials for distribution at the show, and will feature a medical researcher or specialist to answer questions regarding drug interactions with grapefruit juice.
- Media Outreach/Press Office – FDOC will increase awareness of Florida grapefruit and grapefruit juice through an active media relations campaign. This will include developing an updated media list, which will help reach mainstream, online, and multicultural media. FDOC will also utilize the Mat story program. Through this approach, FDOC will continue to communicate the superior value and quality of Florida grapefruit and grapefruit juice – highlighting the message that Canadian consumers prefer Florida product over competitive fruit and juice.

The functional benefits of Florida grapefruit will also be communicated, such as aiding in weight loss, helping the body absorb iron, improving skin appearance, and boosting energy. The media will also be reminded of Florida's "green" advantage, as it is the grapefruit supplier closest to Canada.

Measurements:

- ✓ Performance Measurement Study – annual tracking study that measures consumer purchase dynamics
- ✓ Country Progress Report – annual evaluation of program results, a requirement of Foreign Agricultural Services (USDA)
- ✓ Florida's Fresh Citrus Shipment Report – tracks weekly movement of Florida grapefruit movement by country
- ✓ Florida Citrus Economic Indicators Report – reports US Department of Commerce monthly tracking of US grapefruit juice exports by global region
- ✓ Global Trade Atlas – electronic database that measures export volume and market share

Marketing Plan – FY 2009-10

Canada Orange Juice

Market Assessment:

- The recession, which from a consumer's point of view, came to Canada in the 4th quarter of 2008, will continue to have an impact on the food business throughout 2009 and into 2010. "Recession Diets" will cause consumer spending in the grocery aisles to decrease.
- The orange juice category is relatively mature and household penetration is high. The market dynamics in Canada closely resemble those of the US.
- Canada is the No. 1 export market for Florida orange juice with approximately 50% of our export sales going north.
- Spending on food outside of the home is increasing but still lags behind the US.
- The popularity of US food products among Canadian consumers is very high.
- The closer integration of the North American food market under the NAFTA agreement means that US food and agricultural products are in high demand by Canadian retailers.
- Dual-income families are the norm but single-parent families are also prominent, there are many more women in the work force today compared to prior generations. Women are the primary shoppers of the category.
- Canadian consumers hold Florida orange juice in high regard, research indicates 86% of Canadians surveyed consider 100% pure Florida orange juice as having the highest quality.
- The Canadian Dollar, like some foreign currencies, has lost buying power against the USD over the last twelve months.
- Florida is the market leader in Canada with approximately a 55% share; Brazil is the major competitor.
- **Strengths:** Wholesomeness of the product, the "Florida" name - Florida has high recognition and a positive association with the Canadian consumer, consumer's premium perception of Florida OJ, Florida's proximity to foreign market, well established infrastructure and channels of distribution, Florida processors (private label and branded) well known and respected by the Canadian trade
- **Weaknesses:** Low awareness of specific product benefits, stringent Canadian standards on product benefit claims, no common identifier for Florida juice, diminishing fruit supply, diseases and rising prices
- **Opportunities:** Populace favorably disposed to consumption of fresh fruits and juices, market access and ease of entry, convenience of providing a daily recommended serving of fruit and vegetables, not-from-concentrate juice on the rise in Canada
- **Threats:** Juice confusion with products containing less than 100% fruit juice, Brazil and ease of market entry, beverage proliferation encroaching on the breakfast occasion, strong U.S. Dollar makes it more difficult for growers to pass on higher production costs, recession will impact food purchases

Target Audience:

Middle to upper income consumers, aged 35+ with children

Objective:

Increase awareness and preference for orange juice to increase overall sales of orange juice and, by virtue of its market share leadership, increase Florida orange juice market share and sales.

Strategies:

The FDOC anticipates that increases in orange juice consumption and exports to Canada can be achieved by implementing the following strategies:

- Leverage the health benefits of drinking a daily glass of 100 percent orange juice – beneficial nutrients recharge/energize, boost immunity and contribute to heart health – to motivate Canadians to drink more.
- Educate consumers about the superior taste of 100% pure Florida orange juice.
- Communicate orange juice's benefits as a cold and flu fighter.

Tactics:

- **Advertising**
As in previous years, the FDOC will conduct a consumer advertising campaign that will consist of television ads, reinforcing the FDOC's message that Florida orange juice is an essential part of maintaining a healthy lifestyle. Commercials will air in three markets: Toronto, Ottawa, and Montreal. In Montreal, the commercial will run in English and French.
- **Public Relations**
In order to maintain Florida orange juice's position in the Canadian diet, the FDOC will continue to promote the health and wellness benefits associated with daily orange juice consumption. Public relations activities will be an important component in achieving this goal. The following tactics will be part of the public relations effort:
 - Retail Outreach/Sampling – FDOC will work with retailers to promote awareness of Florida orange juice's availability, premium taste and health benefits. A promotional program will be developed to provide orange juice samples to grocery customers. FDOC will also continue to build its relationship with key retailers in targeted regions through ongoing liaison outreach.
 - State of Citrus Report – FDOC will prepare a State of Citrus report in both English and French that will be delivered to key trade and media contacts in Ontario, Quebec, and Eastern Canada. In addition to information on the citrus crop, this report will also contain educational tools to help retailers increase sales of orange juice in their stores. The report will be posted on the FDOC Canadian website after it is distributed.

- Canadian Web Site – FDOC will maintain a Canadian-specific website that compliments and supports the FDOC's main site, providing a portal of information on Florida orange juice to Canadian consumers. The website will also include new content designed to create more interaction among visitors, such as adding a blog and leveraging social media tools. FDOC will use the site as a hub for housing all marketing collateral, and will post information on PR events being conducted throughout Canada.
- Promotional Alliances – FDOC will work to create synergies with health-based organizations to profile Florida orange juice. One possible example of a FDOC alliance partner is the Heart and Stroke Foundation. FDOC will use alliances like this to promote its key messages on quality, health, and functional benefits associated with orange juice consumption. This will be accomplished through recipe contests and cooperation within the partners' websites.
- Media Relations – FDOC will increase awareness of Florida orange juice through an active media relations campaign. This will include developing an updated media list, which will help reach mainstream, online, and multicultural media. FDOC will also utilize the Mat story program. Through this approach, FDOC will continue to communicate the superior value and quality of Florida orange juice – highlighting the message that Canadian consumers prefer Florida orange juice over the competition. The media will receive communications on Florida orange juice being a good source of antioxidants and vitamin C that can help maintain a healthy lifestyle, boost energy, and help reduce the severity of colds and the flu.
- Media Monitoring – The FDOC's Canadian PR company will provide media monitoring services for news coverage featuring orange juice. This will cover Canadian newspaper, trade, and broadcast media. They will also provide counsel to the FDOC on how to address any negative coverage in response to news stories as they appear.

Measurements:

- ✓ Performance Measurement Study – annual tracking study that measures consumer purchase dynamics
- ✓ Country Progress Report – annual evaluation of program results, a requirement of Foreign Agricultural Services (USDA)
- ✓ Florida Citrus Economic Indicators Report – reports US Department of Commerce monthly tracking of US orange juice exports by global region
- ✓ Global Trade Atlas – electronic database that measures export volume and market share